



Schools Front End (SFE) Training Budget Maintenance

Presented by: School Fiscal Services Branch

Purpose

During this training session, you will learn how to use Schools Front End (SFE) during the Budget Management period to adjust your school's budget for the current fiscal year.



Training Objective

By the end of this session, you will be able to:

1. Understand key budget concepts used in Schools Front End.
2. Understand Schools Front End features and terms.
3. Enter budget adjustments in Schools Front End.
4. Print the School Budget Signature Form.
5. Delete a Work in Progress in Schools Front End.

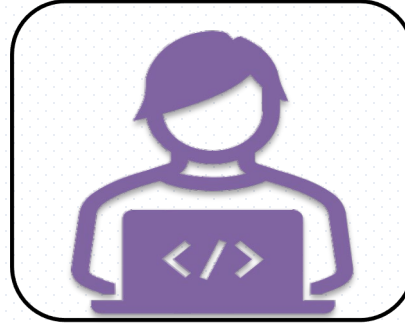
Agenda



**Key Budget
Concepts**



**Schools Front
End (SFE)
Navigation and
Terms**



**Creating
Budget
Adjustments in
SFE (Exercises)**



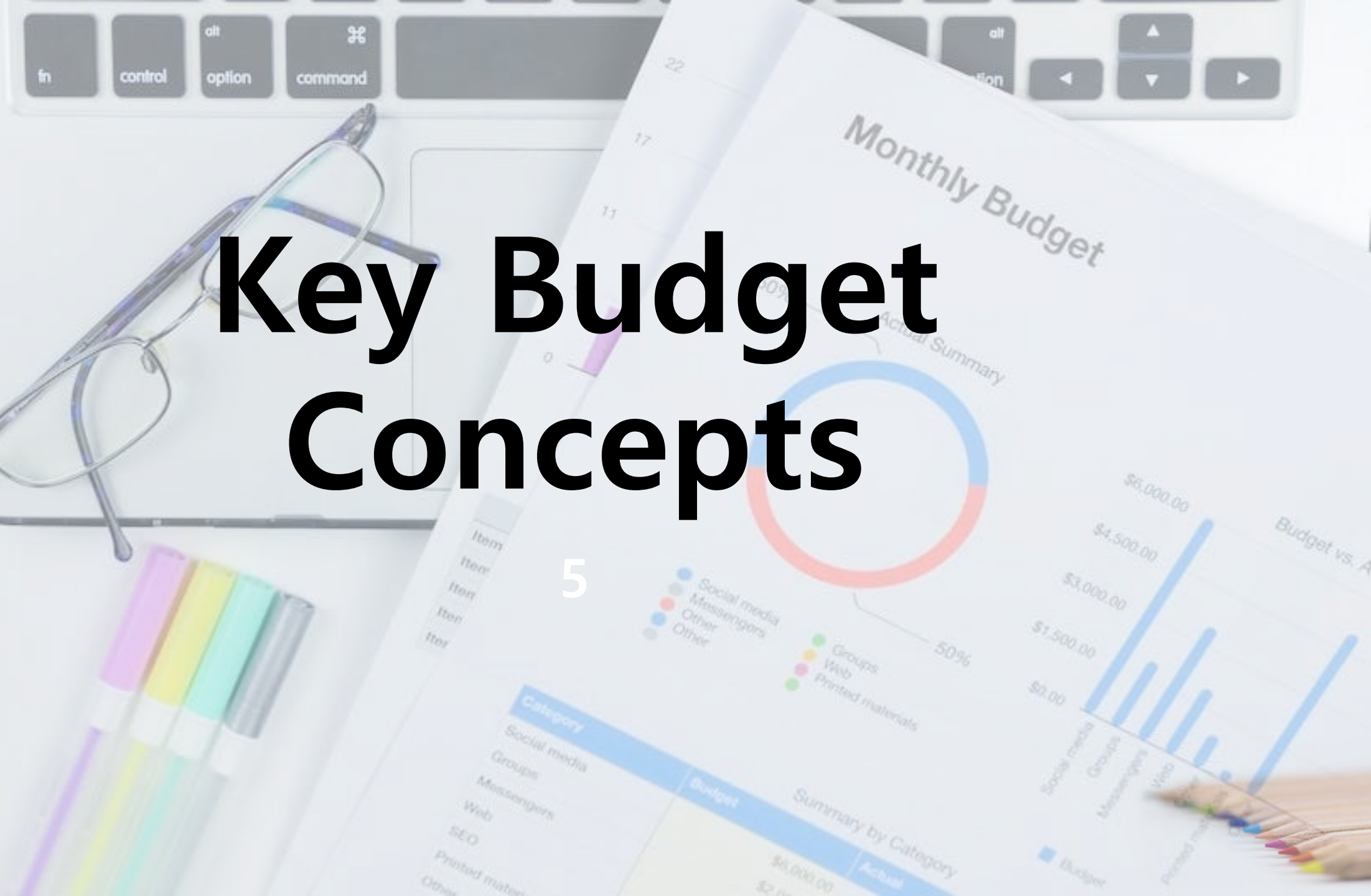
**Printing the
School Budget
Signature Form**







**Deleting A
Work in
Progress (WIP)
in SFE**

Key Budget Concepts

5



Funding Line

			
<u>Fund Center</u> 1234501	<u>Fund</u> 010-0000	<u>Functional Area</u> 1110-1000-13027	<u>Commitment Item</u> 430010
Fund Center (1 + Location Code + Suffix*)	Fund (SACS Fund + Resource)	Functional Area (Goal + Function + Program Code)	Commitment Item (General Ledger or GL)
School location code *The suffix is designated based on the school sub-locations e.g. 01 for the main or regular school and 02 for magnet school	Classifies purpose of the funds and spending restrictions	Goal – groups costs by population, setting and/or educational mode or objective Function – describes activities or services performed to accomplish the Goal Program Code – identifies the allocation resource	Purpose of spending e.g. Salaries, benefits, goods or services that may be budgeted/spent

Key Budget Concepts

Fund and Functional Area Translator

The **SAP Fund and Functional Area Translator** provides a suggested fund/functional area with the input of a commitment item or GL Account and a Program Code.

The screenshot displays the SAP Fund and Functional Area Translator interface. On the left is the SAP navigation menu, and on the right is the main wizard form. The navigation menu includes a 'Welcome JOHN DOE' header, tabs for 'Home', 'Financials/Budget', and 'Human Resources', and a 'Detailed Navigation' sidebar. The sidebar lists 'Upcoming Dates', 'Help Zone', 'SAP Business Workplace', 'Time Statement', 'Account String Wizard', and 'Fund/Functional Area Translator', which is highlighted with a red rectangle. The main wizard form, titled 'SAP Fund and Functional Area Wizard', contains the following fields and annotations:

- Posting Date:** 01/04/2024
- GL Account:** 430001 General Supplies. An annotation '1 Enter GL Account (also known as Commitment Item)' points to this field.
- OR**
- Product Category:** (empty field)
- Program Code:** 13027 General Fund School Program. An annotation '2 Enter Program Code' points to this field.
- Find Suggested Fund and Functional Area ->** A yellow button with an annotation '3 Click Find Suggested Fund and Functional Area' pointing to it.
- Functional Area:** 1110-1000-13027 General Fund Sch Program. A blue bracket groups this field with the 'Fund' field below it, with an annotation 'Result displays' pointing to the bracket.
- Fund:** 010-0000 GF-Unrestricted
- Note:** This offers only a suggested Functional Area. For categorical programs, please refer to your categorical guidelines to make sure the appropriate Functional Area is used.
- Clear** button at the bottom.

Key Budget Concepts

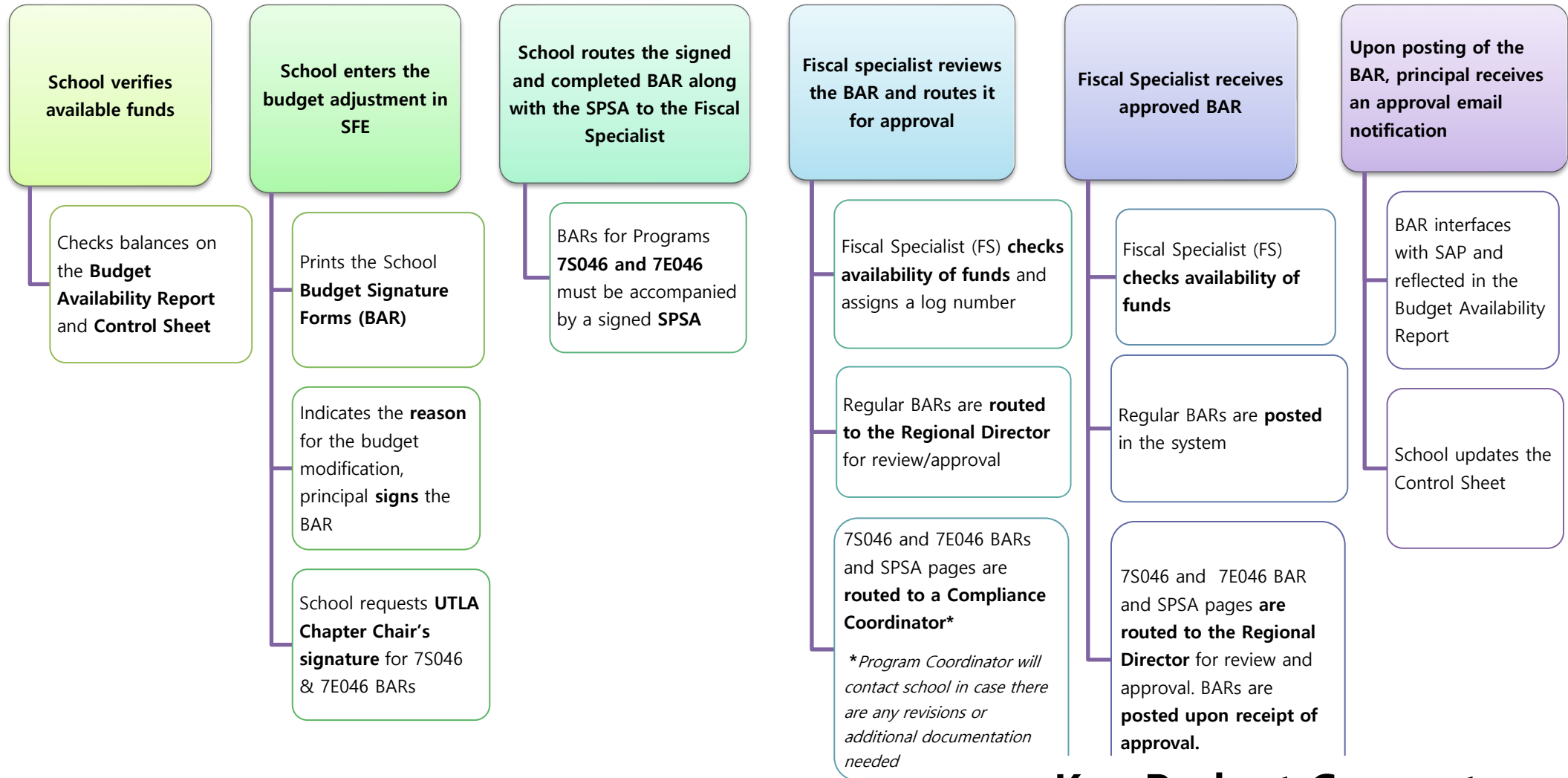
Fund and Functional Area Guide

The information below may be used as a general guide to budget positions and supplemental salaries.

Fund	Func Area	Job Classifications
010-XXXX	1110-1000-XXXXX	Teachers, Instructional Aides, Special Ed Assts
010-XXXX	1110-2420-XXXXX	Librarians, Library Aides
010-XXXX	1110-3110-XXXXX	Counselors, AP Sec Counseling Svcs Itin PSA, Itin PSW, Itin Psych, Itin Stud & Fam Resource Nav
010-XXXX	1110-3140-XXXXX	Itin Nurses
010-XXXX	1110-2700-XXXXX	Principals, Assistant Principals and Clerical Staff
010-XXXX	1110-2100-XXXXX	Certificated Out of Classroom Assignments (Coordinators) Campus Aides, Community Reps, Sch Supervision Aides
010-XXXX	1110-8100-XXXXX	Custodial staff (School Facilities Attendants, B&G Wrkrs, etc.) School Police

Key Budget Concepts

Budget Adjustment Process



Key Budget Concepts

SFE Navigation and Terms

Approval save

Item

Allocation

wip

cm0

submit matchbox

total Maintenance
closed action

SAP Access and Roles

SAP Portal link: <https://bts.lausd.net/irj/portal>

Path: Financials/Budget > SAP Budget – School Front End > School Budget Planning Maintenance

The screenshots illustrate the navigation path to the School Budget Planning Maintenance page. The first screenshot shows the SAP portal home page with the 'Financials/Budget' link highlighted. The second screenshot shows the 'SAP Budget - Schools Front End' link highlighted. The third screenshot shows the 'School Budget Planning and Maintenance' page with the main content area highlighted.

1 Financials/Budget

2 SAP Budget - Schools Front End

3 School Budget Planning and Maintenance

Task

Task	Version	Fiscal Year	Locks
Budget Planning	FN0 Final Version	2025	Locked
Budget Maintenance	CM0 Current Maintena...	2025	

Reports Justification Administration Message

Reports	Justification	Administration	Message
Budget Report	Archive Report	School Resource Allocation	
Signature Form	Archived Signature Form	General Fund Allocation Report	
Signature Form With Print Range	COFE Budget Report	Staffing and Resources	
Progress Report	School Discretionary Programs Rep	School Budget Summary	
Budget With Incumbent Report	Estimated Rates By Budget Item	Cost Limits	
Position With Incumbent Report	Employee Assignment Cost	Furlough Savings Report	



To request access to Schools Front End (SFE) use the SAP Access Request Form to request one of the following roles for your cost center:

1. RF705 – Budget Adjuster (SAA, Coordinator and Assistant Principal)
2. RF706 – School Budget Submitter (Principal)

SFE Navigation and Terms

Budget Version

- 3
- Choose the Version:
- Budget Planning -FN0 - *used for Budget Development; locked during the remainder of the school year.*
 - **Budget Maintenance - CM0 – used throughout the school year to adjust the current school year's budget.**

School Budget Planning and Maintenance

School Budget Planning and Maintenance

Funds Center }
SACS Fund
LAUSD Program } Enter Fund Center, Fund, and Program.

List All Authorized Clear Selection Criteria Save Selection Criteria Click Save Selection Criteria.

Task

	Version	Fiscal Year	Locks
Budget Planning	FN0 Final Version	2025	Locked
Budget Maintenance	CM0 Current Maintena...	2025	

Reports Justification Administration Message

Budget Report	Archive Report	School Resource Allocation
Signature Form	Archived Signature Form	General Fund Allocation Report
Signature Form With Print Range	COFE Budget Report	Staffing and Resources
Progress Report	School Discretionary Programs Rep	School Budget Summary
Budget With Incumbent Report	Estimated Rates By Budget Item	Cost Limits
Position With Incumbent Report	Employee Assignment Cost	Furlough Savings Report

SFE Navigation and Terms

SFE Budget Adjustment

School Budget Maintenance

1

2

3

4

5

Submit For Approval Warnings Cost Limits Delete WIP

LAUSD
READY FOR THE WORLD

Funds Center 1234501 ABC ELEMENTARY
SACS Fund/Rsrc 010 / 3010 General Fund
LAUSD Program 7S046 CE-NCLB T1 Schools
Version CM0 Current Maintenance
Fiscal Year 2025

Change Type School Change
Status Work In Progress

Total Allocation 277,920.00
Total Budget Amt 277,920.00
Total Difference 0.00

Item Based Detail Non-Item Based Detail Approvals History Notes Header Details Reason

Add New Item Based Detail Line

Line Type Item Goal Function Position Temp Position Clear Add Entry Validate Detail Validate

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370750	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370753	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	117360	CAT PRG AD CIT 27/10	1110	2100	30522819	190001	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	156,770.00
1POSITN	27785	COMMUNITY REP C	1110	2100	30453708	290001	07/01/2024	06/30/2025	A	3.0...	5.000	0.38	100.00	14,824.00
20THS-L	11681	CRD DIF CAT PRG ADV	1110	2100		190004	07/01/2024	06/30/2025				0.00		1,559.00
20THS-L	14693	TCHR X (NON-TUTOR)	1110	1000		110004	07/01/2024	06/30/2025				0.00		7,210.00
30TH-L	40239	POTENTIAL FNDING VAR	1110	1000		430098	07/01/2024	06/30/2025				0.00		0.00
30TH-L	40261	PENDING DISTRIBUTION	1110	1000		430009	07/01/2024	06/30/2025				0.00		5,183.00

Double click on line to display Entry Detail Entry 1 of 8

New Work In Progress (WIP) will be created

1. Menu Bar

2. Action buttons

3. Budget Information

- Fund Center,
- Program Information,
- Version and Fiscal Year

4. Change Type/Budget Status

- Allocation Information
- Total Allocation,
- Total Amount Budgeted, and
- Total Difference

SFE Navigation and Terms

SFE Budget Adjustment

School Budget Maintenance

Submit For Approval Warnings Cost Limits Delete WIP

Funds Center 1234501 **ABC ELEMENTARY** **Change Type** School Change
SACS Fund/Rsrc 010 / 3010 **General Fund** **Status** Work In Progress
LAUSD Program 7S046 **CE-NCLB T1 Schools**
Version CM0 **Current Maintenance**
Fiscal Year 2025

Total Allocation 277,920.00
Total Budget Amt 277,920.00
Total Difference 0.00

Item Based Detail Non-Item Based Detail Approvals History Notes Header Details Reason

6 Add New Item Based Detail Line

Line Type Item Goal Function Position Temp Position Clear Add Entry Validate Detail **7**

8

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370750	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370753	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	117360	CAT PRG AD CIT 27/10	1110	2100	30522819	190001	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	156,770.00
1POSITN	27785	COMMUNITY REP C	1110	2100	30453708	290001	07/01/2024	06/30/2025	A	3.0...	5.000	0.38	100.00	14,824.00
20THS-L	11681	CRD DIF CAT PRG ADV	1110	2100		190004	07/01/2024	06/30/2025				0.00		1,559.00
20THS-L	14693	TCHR X (NON-TUTOR)	1110	1000		110004	07/01/2024	06/30/2025				0.00		7,210.00
30TH-L	40239	POTENTIAL FNDING VAR	1110	1000		430098	07/01/2024	06/30/2025				0.00		0.00
30TH-L	40261	PENDING DISTRIBUTION	1110	1000		430009	07/01/2024	06/30/2025				0.00		5,183.00

Double click on line to display Entry Detail Entry 1 of 8

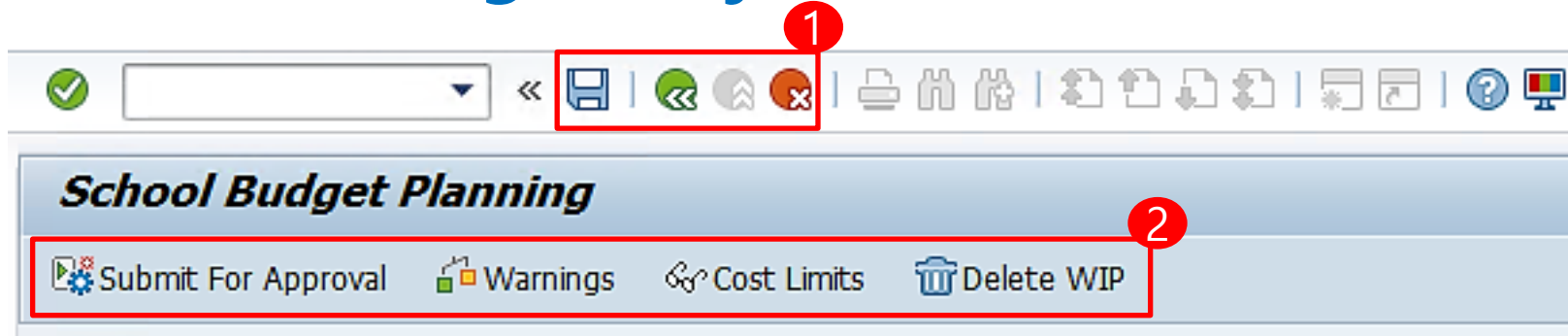
10 ☒ New Work In Progress (WIP) will be created




6. Add New Item Based Detail Line
7. Validate Detail
8. Budget Information
9. Difference Column
10. Information Messages





Difference

SFE Navigation and Terms

SFE Budget Adjustment - Actions




- 1  - Saves changes and returns the user to the SFE home screen
-  - Navigates back to the previous screen
-  - Cancels the last action and navigates back to the previous screen

-  Submit For Approval - Allows user to submit the budget adjustment (available to administrators only)
- 2  Warnings - Displays incumbent warning (e.g. position being closed is not vacant)
-  Cost Limits - Displays cost limits based on program guidelines (indirect, PD, IMA, etc.), if applicable
-  Delete WIP - Allows user to delete a Work in Progress (WIP) and return to the last approved budget

SFE Budget Adjustment - Header

School Budget Maintenance

Submit For Approval Warnings Cost Limits Delete WIP

	Funds Center	1234501	ABC ELEMENTARY	1	Change Type	School Change	
	SACS Fund/Rsrc	010 / 3010	General Fund		Status	Work In Progress	
	LAUSD Program	7S046	Academic Excellence				
	Version	CM0	Final Version				
	Fiscal Year	2025					
					2	Total Allocation	277,920.00
						Total Budget Amt	277,920.00
						Total Difference	0.00

1. School and Budget Information - Fund Center, Fund, Program, Budget Version, and Fiscal Year
2. Total Allocation should equal the Total Budget Amount. Total Difference should be zero.



When the intent is to move funds between the TSP programs (10552, 10947, 10948, 10949), the combination of budget adjustments must result in a Total Difference of zero in order to be considered balanced.

SFE Budget Adjustment – Budget Lines

1

2

Item Based Detail Non-Item Based Detail Approvals History Notes Header Details Reason

Add New Item Based Detail Line

Line Type Item Goal Function Position Temp Position Clear Add Entry Validate Detail Validate

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmmt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370750	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370753	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	117360	CAT PRG AD C1T 27/10	1110	2100	30522819	190001	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	156,770.00
1POSITN	27785	COMMUNITY REP C	1110	2100	30453708	290001	07/01/2024	06/30/2025	A	3.0...	5.000	0.38	100.00	14,824.00
20THS-L	11681	CRD DIF CAT PRG ADV	1110	2100		190004	07/01/2024	06/30/2025				0.00		1,559.00
20THS-L	14693	TCHR X (NON-TUTOR)	1110	1000		110004	07/01/2024	06/30/2025				0.00		7,210.00
30TH-L	40239	POTENTIAL FNDING VAR	1110	1000		430098	07/01/2024	06/30/2025				0.00		0.00
30TH-L	40261	PENDING DISTRIBUTION	1110	1000		430009	07/01/2024	06/30/2025				0.00		5,183.00

1. New budget lines are added by completing the New Item Based Detail Line area and clicking the *Add Entry* button.
2. Existing budget lines display in the bottom portion of the screen and may be modified as needed.



Information can only be entered in the white-shaded fields.

SFE Budget Adjustment -Matchbox

Clicking in some fields in SFE will give you access to a matchbox. The matchbox will provide a dropdown menu of options for filling in the field.

Line Type

Budget Line Type 7 Entries

BudLnTyp	Short Description
1POSITN	Position Requisition
20THS-L	Other Salary Items L
20THS-M	Other Salary Items M
20THS-O	Other Salary Items O
30TH-L	Other Budget Limited
30TH-M	Other Budget MultiYr
30TH-O	Other Budget Ongoing

Item

Budget Item 28 Entries

Bud Item	Item Description	Comm item	Indirect
40005	OTHER BOOKS	420010	
40124	NON-CAP EQUIP CLSRM	440001	
40125	NON-CAP EQUIP-OTHER	440001	
40127	GEN SUPPLIES TECHNO	430001	
40183	MAIN/OPER SUPPLIES	430003	
40230	NEGATIVE ALLOCATION	430077	
40261	PENDING DISTRIBUTION	430009	
40269	SUPPLMTL INSTRL MAT	430010	
40322	SALARY INCREASE	430077	
40330	SAL INC-SEIU	430009	
40335	H&W/BENEFIT ADJ	430009	
40346	PEND DIST 2ND ALLOCA	430009	
50002	CONTR INSTRL SVC	580030	
50003	OTH NON INSTRL CONT	580002	
50058	ADMISSION TICKET	580005	
50059	MILEAGE	520001	
50073	PARENT CONF ATTND	520002	
50080	STAFF CONF ATTEND	520002	
50118	DUES & MBRSHIP/STF	530001	
50133	RENTAL/LEASE EQUIP	560011	
50147	MAINTENANCE OF EQUIP	560006	
50161	PRS SER CONT NON INS	580001	
50174	CURRICULAR TRIPS	580012	
50243	SOFTWARE LICNS MAINT	580020	
50254	PHONEEXP-TI OFC/PRNT	590001	
50255	CNTRCTSUBARGMNTS>25K	510010	
50256	RENIL/LEASE EQP-INST	560011	
JRABE-60	RES FOR ANTICPTD BAL	430077	

Goal

Goal 2 Entries

Goal	Substring Description 2
0000	Undistributed
1110	Regular Education, K-12

Function

SACS Function 1 Entry

Func	Substring Description 2
2700	School Administration

SFE Navigation and Terms

SFE Matchbox – Position Status

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370750	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370753	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	117360	CAT PRG AD C1T 27/10	1110	2100	30522819	190001	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	156,770.00
1POSITN	27785	COMMUNITY REP C	1110	2100	30453708	290001	07/01/2024	06/30/2025	A	3.0...	5.000	0.38	100.00	14,824.00
20THS-L	11681	CRD DIF CAT PRG ADV	1110	2100		190004	07/01/2024	06/30/2025				0.00		1,559.00
20THS-L	14693	TCHR X (NON-TUTOR)	1110	1000		110004	07/01/2024	06/30/2025				0.00		7,210.00
30TH-L	40239	POTENTIAL FNDING VAR	1110	1000		430098	07/01/2024	06/30/2025				0.00		0.00
30TH-L	40261	PENDING DISTRIBUTION	1110	1000		430009	07/01/2024	06/30/2025				0.00		5,183.00

Clicking the *PStat* matchbox will provide the dropdown menu

Position Status:

- **Active** – activates a position and calculates the cost of the position based on its attributes, and effectivity dates
- **Closed** – closes a position and releases unused funds based on the end date
- **Suspend** – used to capture salary savings during Budget Maintenance (CM0) only.

Position Status 3 Entries

Pos Stat	Short Descript.
A	Active
C	Closed
S	Suspend

✓ ★ H P ✗

SFE Budget Adjustment - Add New Item Based Detail Line

1 Add New Item Based Detail Line

Line Type: Item: Goal: Function: Position: Temp Position: Next Clear Add Entry Validate

2

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370750	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370753	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	117360	CAT PRG AD C1T 27/10	1110	2100	30522819	190001	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	156,770.00
1POSITN	27785	COMMUNITY REP C	1110	2100	30453708	290001	07/01/2024	06/30/2025	A	3.0...	5.000	0.38	100.00	14,824.00
20THS-L	11681	CRD DIF CAT PRG ADV	1110	2100		190004	07/01/2024	06/30/2025				0.00		1,559.00
20THS-L	14693	TCHR X (NON-TUTOR)	1110	1000		110004	07/01/2024	06/30/2025				0.00		7,210.00
30TH-L	40239	POTENTIAL FNDING VAR	1110	1000		430098	07/01/2024	06/30/2025				0.00		0.00
30TH-L	40261	PENDING DISTRIBUTION	1110	1000		430009	07/01/2024	06/30/2025				0.00		5,183.00

Budget Line Type 7 Entries

BudLnTyp	Short Description
1POSITN	Position Requisition
20THS-L	Other Salary Items L
20THS-M	Other Salary Items M
20THS-O	Other Salary Items O
30TH-L	Other Budget Limited
30TH-M	Other Budget MultiYr
30TH-O	Other Budget Ongoing

1. Clicking on the **Line Type** matchbox will provide the dropdown menu

2. **Budget Line Types for Schools:**

- 1POSITN - Positions
- 20THS-L - Other Supplemental salary budget lines (Limited) - e.g. teacher x-time, clerical overtime, itinerants
- 30TH-L - Other Operating expense budget lines (Limited) - e.g. IMA, general supplies, contracts



Line Types ending with an M or an O are for central office use only.

SFE Budget Adjustment - Add New Item Based Detail Line

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmmt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370750	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	30370753	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00

1. SFE uses Item Numbers which can be obtained from the *Item* dropdown menu or by viewing the *Estimated Rate Sheet* on the School Fiscal Services website.
2. The Goal and Function for the *Item* are available from the dropdown menu or automatically populated for most positions
3. The Position and Temp Position may be used as needed to create or modify positions.
4. Click Add Entry to add the new line to the budget.

Double Clicking on any line in your budget will take you to the Detail Screen.

- 1. Return to List
- 2. Validate All Detail Lines
- 3. Copy
- 4. Undo Changes
- 5. Reset Before WIP
- 6. Next Entry
- 7. Entry Detail
- 8. Position Detail
- 9. Costs
- 10. Last Change

Item Based DetailNon-Item Based DetailApprovalsHistoryNotesHeader DetailsReason

Return To List

Validate All Detail Lines

Copy

Undo Changes

Reset Before WIP

Previous Entry

Next Entry

Entry 3 of 8

Entry Detail

Line Type1POSITN

Item117360

CAT PRG AD C1T 2

SACS Goal1110

SACS Function2100

Position30522819

Temp Position

Commitment Item190001

Fund010-3010

Functional Area1110-2100-7S046

Fund Percentage100.00

FTE1.00

Position Detail

Position Status

Job19100704

ADVSR, CTEGORCL PGM

Incumbent0

Hours/Day/Month6.000 / 0.000

Days/Week5.000

Subgrp31-Hrly3-Salary

PersonnelArea2UTKSubareaCSXXWT0005

Pay ScaleType02AreaUTLevel10Group27

Norm Indicator

Start Date07/01/2024

End Date06/30/2025

Costs

Salary Amount108,115.00

Total Benefits24,155.00

Health24,500.00

Total Cost156,770.00

Benefits Detail

Worker Comp1,882.00

Unemployment55.00

STRS20,650.00

Social Security0.00

PERS0.00

PARS0.00

Medicare1,568.00

Last Change

User Name

Date

Time00:00:00

SFE Budget Adjustment

SFE Navigation and Terms

22

SFE Budget Adjustment - Messages

These messages will appear at the bottom of your screen and alert you to important issues.

☒ New Work In Progress (WIP) will be created

☐ Enter date in the format __/__/__

☒ All budget entries are valid

☐ End Date cannot be prior to Start Date

☒ New Item Based entry has been inserted in sorted position

☐ Position 30471010 has overlapping Active/Closed (A/C) intervals

☒ Budget changes were Submitted to Fiscal Specialist for Approval

School Budget Maintenance

Submit For Approval Warnings Cost Limits Delete WIP

Los Angeles Unified
Funds Center: 1234501
SACS Fund/Rsrc: 010 / 3010
LAUSD Program: 75046
Version: CM0
Fiscal Year: 2025

ABC ELEMENTARY
General Fund
CE-NCLB T1 Schools
Current Maintenance

Change Type: School Change
Status: Work In Progress

Total Allocation: 277,920.00
Total Budget Amt: 277,920.00
Total Difference: 0.00

Item Based Detail Non-Item Based Detail Approvals History Notes Header Details Reason

Add New Item Based Detail Line

Line Type	Item	Goal	Function	Position	Temp Position	Clear	Add Entry	Validate Detail
					Next			Validate

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
1POSTIN	107762	TCHER AST DEG TK NW/2	1110	1000	30370750	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSTIN	107762	TCHER AST DEG TK NW/2	1110	1000	30370753	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00
1POSTIN	117960	CAT FRG AD CIT 27/10	1110	2100	30522819	190001	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	156,770.00
1POSTIN	27785	COMMUNITY REP C	1110	2100	30453708	290001	07/01/2024	06/30/2025	A	3.0...	5.000	0.38	100.00	14,824.00
20THS-L	11691	CRD DIF CAT FRG ADV	1110	2100		190004	07/01/2024	06/30/2025				0.00		1,559.00
20THS-L	14693	TCHER X (NON-TUTOR)	1110	1000		110004	07/01/2024	06/30/2025				0.00		7,210.00
30TH-L	40239	POTENTIAL ENDING VAR	1110	1000		430098	07/01/2024	06/30/2025				0.00		0.00
30TH-L	40241	PENDING DISTRIBUTION	1110	1000		430009	07/01/2024	06/30/2025				0.00		5,183.00

Double click on line to display Entry Detail

Entry 1 of 8

☒ New Work In Progress (WIP) will be created

SFE Navigation and Terms

Creating Budget Adjustments in SFE

24



Entering Budget Adjustments in SFE

Program 10947

1. Add a New Item Based Detail Line – Non-Salary – Other Books
2. Move dollars between existing budget lines
3. Add a new position budget line – Teacher Assistant

Entering Budgets in SFE

Exercise 1

Add a New Item Based Detail Line – Non-Salary in Program 10947

1. Add a new item-based detail line for Other Books:

- a. Locate Line Type under Add New Item Based Detail Line. Use matchbox to select "**3OTH-L**"
- b. Use the "**Item**" matchbox to select the budget item for "**OTHER BOOKS**".¹
- c. Use the "**Goal**" matchbox to select the goal.²
- d. Use the "**Function**" matchbox to select the function.³
- e. Click "**Add Entry**"

Helpful Hints:

- ¹ The item number is also available on the Estimated Rates Sheet.
- ² Note: The same goal is used for all budget line items in a program.
- ³ Note: The Function Job Aide by Program and/or Fund/Functional Area Translator can be used to identify the correct function, if multiple options are presented.

Entering Budgets in SFE

Exercise 1

Add a New Item Based Detail Line – Non-Salary in Program 10947

2. Enter additional required information on newly added item-based detail line

a. Input the following:

- Start date – 7/1/2024 ¹
- End date – 6/30/2025
- Total Cost - \$1,000 ²

b. Click "**Validate**" ³

Helpful Hints:

- ¹ Dates can also be entered in this format - 070124
- ² When inputting dollars, do not enter cents and do not use commas.
- ³ Every time you click validate, check to see if you have any warnings.

3. Move funds from General Supplies

- Locate the "**GENERAL SUPPLIES**" budget line item
- Click on the "**Total Cost**" of the "**GENERAL SUPPLIES**" budget line and reduce to \$0
- Click "**Validate**"
- Input the amount from the "**Total Difference**" field in the "**Total Cost**" column of the "**GENERAL SUPPLIES**" budget line item
- Click "**Validate**"

Entering Budgets in SFE

Exercise 2

Move funds from H&W Benefit Adjustment and Contract Instructional Service to increase Teacher Assistant Relief to \$15,000 in program 10947.

1. **Zero out the Teacher Assistant Relief budget line:**
 - a. Click on the **"Total Cost"** of the **"TEACHER AST RELIEF"** budget line and reduce to \$0
 - b. Click **"Validate"**
2. **Enter the new amount in the Teacher Assistant Relief budget line.**
 - a. Enter \$15,000 in the **"Total Cost"** column of the **"TEACHER AST RELIEF"** budget line
 - b. Click **"Validate"**
3. **Zero out the H&W Benefit Adjustment budget line**
 - a. Click on the **"Total Cost"** of the **"H&W WC&PERS BENADJ"** budget line and reduce to \$0
 - b. Click **"Validate"**

Entering Budgets in SFE

Exercise 2

Move funds from H&W Benefit Adjustment and Contract Instructional Service to increase Teacher Assistant Relief to \$15,000 in program 10947.

4. **Reduce the Contract Instructional Service budget line**
 - a. Click on the **"Total Cost"** of the **"CONTR INSTRL SVC"** budget line and reduce to \$0
 - b. Click **"Validate"**
 - c. The **"Total Difference"** field should now reflect the amount needed to balance the document. Enter that amount in the **"Total Cost"** field for **"CONTR INSTRL SVC"**.
 - d. Click **"Validate"**
5. **Click Save.**

Entering Budgets in SFE

Exercise 3

Add a New Item Based Detail Line Teacher Assistant Position in Program 10947. Balance the budget adjustment with Tutor Teacher x-time.

1. Add New Teacher Assistant Position

- a. Locate "**Line Type**" under "**Add New Item Based Detail Line**". Use matchbox to select "1POSITN".
- b. Enter the item number for a Teacher Assistant Degree Track - 107762.
- c. Use the matchbox next to "**Goal**" to select the goal.
- d. Use the matchbox next to "**Function**" to select the function.
- e. Click "**NEXT**" (under "Temp Position") to generate a temporary position control number. Note the temporary position control number.
- f. Click "**Add Entry**".

Helpful Hints:

- Clicking on the Item matchbox will give the option to search for a position by job code. The item number is available on the Estimated Rates Sheet
- The same goal is used for all budget line items in a program.
- The Function Job Aide by Program and/or Fund/Functional Area Translator can be used to identify the correct function.

Entering Budgets in SFE

Exercise 3

Add a New Item Based Detail Line Teacher Assistant Position in Program 10947. Balance the budget adjustment with Tutor Teacher x-time.

2. Enter the additional required information on the newly added item-based detail line

a. Input the following:

- Start date – 7/1/2024
- End date – 6/30/2025
- Hours per day - 6
- Days per week - 5
- Fund % - 100%

Helpful Hints:

- 1 Dates can also be entered in this format - 070124
- 2 When inputting dollars, do not enter cents and do not use commas.
- 3 Every time you click validate, check to see if you have any warnings.

b. Click "**Validate**" and the system will generate the total cost for the position

3. Move funds from Tutor Teacher x-time

- Locate the "**TUTOR TCHR X TIME**" budget line item
- Click on the "**Total Cost**" of the "**TUTOR TCHR X TIME**" budget line item and reduce to \$0
- Click on "**Validate**"
- Input the amount in the "**Total Difference**" field in the "**Total Cost**" column of the "**TUTOR TCHR X TIME**" budget line item
- Click "**Validate**"

4. Click "Save" to return to the SFE Home Page.

Entering Budgets in SFE

Exercise 1

LOS ANGELES UNIFIED
READY FOR THE WORLD

Funds Center: 1234501
SACS Fund/Rsrc: 010 / 0000
LAUSD Program: 10947
Version: CM0
Fiscal Year: 2025

ABC ELEMENTARY
General Fund
Academic Excellence
Current Maintenance

Change Type: School Change
Status: Work In Progress

Total Allocation: 1,068,075.00
Total Budget Amt: 1,068,075.00
Total Difference: 0.00

Item Based Detail | Non-Item Based Detail | Approvals | History | Notes | Header Details | Reason

Add New Item Based Detail Line

Line Type: 30TH-L (a) | Item: 40005 (b) | Goal: 1110 (c) | Function: 1000 (d) | Position: | Temp Position: | Clear | Add Entry (e) | Validate Detail | Validate

Instructions

1. Add a new item-based detail line for Other Books:

- Use the "Line Type" matchbox to select 30TH-L
- Use the "Item" matchbox to select the budget item for "OTHER BOOKS"
- Use the "Goal" matchbox to select the goal
- Use the "Function" matchbox to select the function
- Click "Add Entry"

Helpful Hints:

To view the matchbox for a cell, click anywhere in the cell.

Entering Budgets in SFE

Exercise 1

Exercise 1

Instructions

2. Enter the additional required information on the newly added item-based detail line:
 - a. Input the following:
 - Start date – 07/01/2024
 - End date – 06/30/2025
 - Total Cost - \$1,000
 - b. Click “**Validate**”.

Helpful Hints:

Note the change in the Total Difference and the system message that indicates “All budget entries are valid”.

Double click on line to display Entry Detail


Entry 20 of 27

✓ All budget entries are valid

SAP

Entering Budgets in SFE

Exercise 1



Funds Center 1234501 ABC ELEMENTARY
SACS Fund/Rsrc 010 / 0000 General Fund
LAUSD Program 10947 Academic Excellence
Version CM0 Current Maintenance
Fiscal Year 2025

Change Type School Change
Status Work In Progress

Total Allocation 1,068,075.00
Total Budget Amt 957,079.00
Total Difference 110,996.00

Item Based Detail | Non-Item Based Detail | Approvals | History | Notes | Header Details | Reason

Add New Item Based Detail Line
Validate Detail

Line Type	Item	Goal	Function	Position	Temp Position	Clear	Validate
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="button" value="Clear"/>	<input type="button" value="Validate"/>

Line Type	Bud Item	Bud Item Description	Goal	Funct	Po...	Cmnt Itm	Start Date	End Date	P...	Hr...	Day/...	FTE	Fu...	Total Cost	Difference
30TH-L	40005	OTHER BOOKS	1110	1000		420010	07/01/2024	06/30/2025				0.00		1,000.00	1,000.00
30TH-L	40125	NON-CAP EQUIP-OTHER	1110	1000		440001	07/01/2024	06/30/2025				0.00		2,200.00	
30TH-L	40227	GENERAL SUPPLIES	1110	1000		430001	07/01/2024	06/30/2025				0.00		111,996.00-	

Instructions

3. Move funds from General Supplies:

- Locate the "GENERAL SUPPLIES" budget line
- Delete the amount in the "Total Cost" column
- Click "Validate"


Helpful Hints:

Note the change in the Total Difference and the system message that indicates "All budget entries are valid".

☒ All budget entries are valid

Entering Budgets in SFE

Exercise 1



Funds Center 1234501 ABC ELEMENTARY
SACS Fund/Rsrc 010 / 0000 General Fund
LAUSD Program 10947 Academic Excellence
Version CM0 Current Maintenance
Fiscal Year 2025

Change Type School Change
Status Work In Progress

Total Allocation 1,068,075.00
Total Budget Amt 1,068,075.00
Total Difference 0.00

Item Based Detail | Non-Item Based Detail | Approvals | History | Notes | Header Details | Reason

Add New Item Based Detail Line
Validate Detail

Line Type	Item	Goal	Function	Position	Temp Position	Clear	e Validate
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Add Entry	

Line Type	Bud Item	Bud Item Description	Goal	Funct	Po...	Cmmt Itm	Start Date	End Date	PS...	Hr...	Day/...	FTE	Fu...	Total Cost	Difference
30TH-L	40005	OTHER BOOKS	1110	1000		420010	07/01/2024	06/30/2025				0.00		1,000.00	1,000.00
30TH-L	40125	NON-CAP EQUIP-OTHER	1110	1000		440001	07/01/2024	06/30/2025				0.00		2,200.00	
30TH-L	40227	GENERAL SUPPLIES	1110	1000		430001	07/01/2024	06/30/2025				0.00	d	110,996.00	1,000.00-

Instructions

3. Move funds from General Supplies (continued):

d. Input the amount in the Total Difference field in the "General Supplies" "Total Cost" column

e. Click "Validate".


Helpful Hints:

Note the change in the Total Difference. When the Total Difference is zero, the budget adjustment is balanced.

☒ All budget entries are valid

Entering Budgets in SFE

Exercise 2



Funds Center 1234501 ABC ELEMENTARY

SACS Fund/Rsrc 010 / 0000 General Fund

LAUSD Program 10947 Academic Excellence

Version CM0 Current Maintenance

Fiscal Year 2025

Change Type School Change

Status Work In Progress

Total Allocation 1,068,075.00

Total Budget Amt 1,070,075.00

Total Difference 2,000.00-

Item Based Detail Non-Item Based Detail Approvals History Notes Header Details Reason

Add New Item Based Detail Line

Line Type	Item	Goal	Function	Position	Temp Position	Clear	Add Entry
					Next		

Validate Detail
Validate

Line Type	Bud Item	Bud Item Description	Goal	Func	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/...	D...	FTE	F...	Total Cost	Difference
20THS-L	10701	TCHR AST RELIEF	1110	1000		110005	07/01/2024	06/30/2025				0.00		15,000.00	2,000.00


Instructions

- Zero out the Teacher Assistant Relief budget line:**
 - Click on the **"Total Cost"** of the **"TEACHER AST RELIEF"** budget line and reduce to \$0
 - Click **"Validate"**
- Enter the new amount in the Teacher Assistant Relief budget line:**
 - Enter \$15,000 in the **"Total Cost"** column of the **"TEACHER AST RELIEF"** budget line
 - Click **"Validate"**

Double click on line to display Entry Detail

Entry 12 of 27

☒ All budget entries are valid



Entering Budgets in SFE

Exercise 2

Header Information:

- Funds Center: 1234501
- SACS Fund/Rsrc: 010 / 0000
- LAUSD Program: 10947
- Version: CM0
- Fiscal Year: 2025
- ABC ELEMENTARY
- General Fund
- Academic Excellence
- Current Maintenance
- Change Type: School Change
- Status: Work In Progress
- Total Allocation: 1,068,075.00
- Total Budget Amt: 1,069,835.00
- Total Difference: 1,760.00-

Item Based Detail Line Entry:

Line Type	Item	Goal	Function	Position	Temp Position

Table:

Line Type	Bud Item	Bud Item Description	Goal	Funct	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/...	D...	FTE	F...	Total Cost	Difference
30TH-L	40339	H&W WC&PERS BENADJ	1110	1000		430009	07/01/2024	06/30/2025				0.00			240.00

Instructions

3. Zero out the H&W Benefit Adjustment budget line:
 - a. Click on the "Total Cost" of the "H&W WC&PERS BENADJ" budget line and reduce it to \$0
 - b. Click "Validate"

Status Bar:

Double click on line to display Entry Detail

Entry 25 of 27

All budget entries are valid

Entering Budgets in SFE

Exercise 2

Exercise 2

Header Information:

- Funds Center: 1234501
- SACS Fund/Rsrc: 010 / 0000
- LAUSD Program: 10947
- Version: CM0
- Fiscal Year: 2025
- ABC ELEMENTARY
- General Fund
- Academic Excellence
- Current Maintenance
- Change Type: School Change
- Status: Work In Progress
- Total Allocation: 1,068,075.00
- Total Budget Amt: 1,068,075.00
- Total Difference: 0.00

Item Based Detail

Add New Item Based Detail Line

Line Type: [] Item: [] Goal: [] Function: [] Position: [] Temp Position: [] [Next] [Clear] [Add Entry] [Validate]

Line Type	Bud Item	Bud Item Description	Goal	Func	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/...	D...	FTE	F...	Total Cost	Difference
30TH-L	50002	CONTR INSTRL SVC	1110	1000		580030	07/01/2024	06/30/2025				0.00		83,240.00	1,760.00-

Instructions

4. Reduce the Contract Instructional Service budget line:

- Click on the "Total Cost" of the "CONTR INSTRL SVC" budget line and reduce to \$0
- Click "Validate"
- The "Total Difference" field should now reflect the amount needed to balance the document. Enter that amount in the "Total Cost" field for "CONTR INSTRL SVC".
- Click "Validate"

Double click on line to display Entry Detail

Entry 26 of 27

All budget entries are valid

Entering Budgets in SFE

Exercise 3

LOS ANGELES UNIFIED
READY FOR THE WORLD

Funds Center: 1234501
SACS Fund/Rsrc: 010 / 0000
LAUSD Program: 10947
Version: CM0
Fiscal Year: 2025

ABC ELEMENTARY
General Fund
Academic Excellence
Current Maintenance

Change Type: School Change
Status: Work In Progress

Total Allocation: 1,068,075.00
Total Budget Amt: 1,068,075.00
Total Difference: 0.00

Item Based Detail | Non-Item Based Detail | Approvals | History | Notes | Header Details | Reason

Add New Item Based Detail Line

Line Type	Item	Goal	Function	Position	Temp Position
1POSITN	107762	1110	1000		Next B2388487

Clear | Add Entry | Validate

a b c d e f

Instructions

1. Add New Teacher Assistant Position

- Locate "**Line Type**" under "**Add New Item Based Detail Line**". Use the matchbox to select "1POSITN".
- Enter the item number for a Teacher Assistant Degree Track - 107762.
- Use the matchbox next to "**Goal**" to select the goal.
- Use the matchbox next to "**Function**" to select the function.
- Click "**NEXT**" (under "Temp Position") to generate a temporary position control number. Note the temporary position control number.
- Click "**Add Entry**".

Entering Budgets in SFE

Exercise 3

Los Angeles Unified
READY FOR THE WORLD

Funds Center: 1234501
SACS Fund/Rsrc: 010 / 0000
LAUSD Program: 10947
Version: CM0
Fiscal Year: 2025

ABC ELEMENTARY
General Fund
Academic Excellence
Current Maintenance

Change Type: School Change
Status: Work In Progress

Total Allocation: 1,068,075.00
Total Budget Amt: 1,114,262.00
Total Difference: 46,187.00-

Item Based Detail | Non-Item Based Detail | Approvals | History | Notes | Header Details | Reason

Add New Item Based Detail Line

Line Type: Item: Goal: Function: Position: Temp Position:

Line Type	Bud I...	Bud Item Description	Goal	Funct	Position	Cmnt	Start Date	End Date	PS	Hr/Day	Day/Wk	FTE	Fund %	Total Cost	D
1POSITN	107762	TCHR AST DEG TK NW/2	1110	1000	B2388487	110005	07/01/2024	06/30/2025	A	6.0...	5.000	1.00	100.00	46,187.00	..

Instructions

2. Enter the additional required information on the newly added item-based detail line:

a. Input the following:

- Start date – 07/01/2024
- End date – 06/30/2025
- Hours per day – 6
- Days per week – 5
- Fund % - 100

b. Click "Validate".

Double click on line to display Entry Detail

Entry: 1 01 20

✓ All budget entries are valid

SAP

Entering Budgets in SFE

Exercise 3

Header Details:

- Funds Center: 1234501
- SACS Fund/Rsrc: 010 / 0000
- LAUSD Program: 10947
- Version: CMO
- Fiscal Year: 2025
- ABC ELEMENTARY
- General Fund
- Academic Excellence
- Current Maintenance
- Change Type: School Change
- Status: Work In Progress

Summary:

- Total Allocation: 1,068,075.00
- Total Budget Amt: 1,034,262.00
- Total Difference: 33,813.00

Item Based Detail Line:

Line Type	Bud I...	Bud Item Description	Goal	Func	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost	D
20THS-L	10376	TUTOR TCHR X TIME	1110	1000		110004	07/01/2024	06/30/2025				00			..


Instructions:

3. Move funds from Tutor Teacher x-time:
 - a. Locate the "TUTOR TCHR X TIME" budget line
 - b. Delete the amount in the "Total Cost" column
 - c. Click "Validate"

Status: Entry 10 of 28. All budget entries are valid.

Entering Budgets in SFE

Exercise 3

 Funds Center 1234501 ABC ELEMENTARY
SACS Fund/Rsrc 010 / 0000 General Fund
LAUSD Program 10947 Academic Excellence
Version CM0 Current Maintenance
Fiscal Year 2025

Change Type School Change
Status Work In Progress

Total Allocation 1,068,075.00
Total Budget Amt 1,068,075.00
Total Difference 0.00

Item Based Detail Non-Item Based Detail Approvals History Notes Header Details Reason

Add New Item Based Detail Line

Line Type Item Goal Function Position Temp Position Clear Add Entry Validate Detail

Next

Validate

Line Type	Bud L...	Bud Item Description	Goal	Funct	Position	Cmnt Itm	Start Date	End Date	PStat	Hr/Day	Day/Wk	FTE	Fund %	Total Cost
20THS-L	10376	TUTOR TCHR X TIME	1110	1000		110004	07/01/2024	06/30/2025				0.00		33,813.00

Instructions

3. Move funds from Tutor Teacher x-time (continued):

d. Input the amount in the Total Difference field in the "TUTOR TCHR X TIME" "Total Cost" column

e. Click "Validate".

Double click on line to display Entry Detail

Entry 10 of 28

☒ All budget entries are valid

SAP

Printing the School Budget Signature Form



Printing the School Budget Adjustment Form

1. From the *School Budget Planning and Maintenance* screen, click *Reports*
2. Click *Signature Form*

School Budget Planning and Maintenance

School Budget Planning and Maintenance

Funds Center: 1234501 ABC ELEMENTARY
SACS Fund: 010 General Fund
LAUSD Program: 10947 Academic Excellence

List All Authorized Clear Selection Criteria Save Selection Criteria

Task

	Version	Fiscal Year	Locks
Budget Planning	FNO Final Version	2025	Locked
Budget Maintenance	CMO Current Maintena...	2025	

1 Reports Justification Administration Message

2

Budget Report	Archive Report	School Resource Allocation
Signature Form	Archived Signature Form	General Fund Allocation Report
Signature Form With Print Range	COFE Budget Report	Staffing and Resources
Progress Report	School Discretionary Programs Rep	School Budget Summary
Budget With Incumbent Report	Estimated Rates By Budget Item	Cost Limits
Position With Incumbent Report	Employee Assignment Cost	Furlough Savings Report

Printing the School Budget Adjustment Form

3. Enter the following:
Version – *CM0*
Fiscal Year – e.g. *2025*
Fund Center – Cost Center
Fund – *010*
LAUSD Program - 10947
4. Select *WIP Version*
5. Select *Print the Form*
6. Click *Execute*

School Budget Signature Form

6

School Budget Selection

3 List All Authorized Clear Selection Criteria

Version	CM0	Current Maintenance
Fiscal Year	2025	
Fund Center	1234501	ABC ELEMENTARY
SACS Fund	010	General Fund
LAUSD Program	10947	Academic Excellence

Number of Blank Lines

Budget Detail Version

4 ☐ Before WIP Version
☒ WIP Version (Work In Progress - with unapproved changes)

5 Output Type
☒ Print the Form
☐ Email the Form

Email Parameters

Send To

CC To

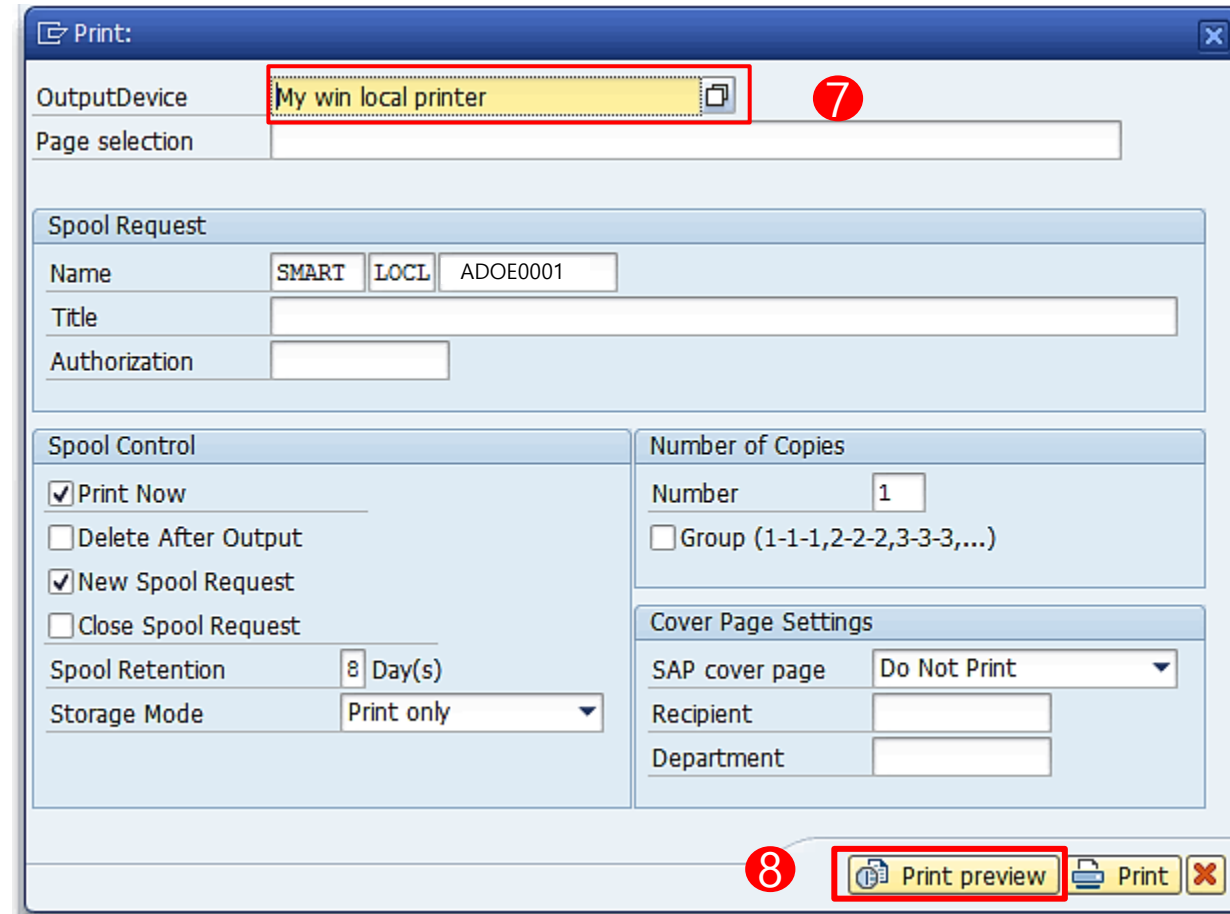
☐ Add Attachments From Desktop?

☐ Edit Message Before Sending?

Email Title

Printing the School Budget Adjustment Form

7. In the *Output Device*, select *My win local printer*
8. Click *Print Preview*



Print:

OutputDevice: **My win local printer** 7

Page selection:

Spool Request

Name:

Title:

Authorization:

Spool Control

☒ Print Now

☐ Delete After Output

☒ New Spool Request

☐ Close Spool Request

Spool Retention: Day(s)

Storage Mode:

Number of Copies

Number:

☐ Group (1-1-1,2-2-2,3-3-3,...)

Cover Page Settings

SAP cover page:

Recipient:

Department:

8 Print preview

School Budget Signature Form

Fund Center	1234501	ABC EL
Fund	010-0000	GF-Unrestricted
LAUSD Program	10947	Academic Excellence
Version / Year	CM0 / 2025	
Grant / Funded	NOT RELEVANT /	OPR00000
Division	RN	REGION NORTH

BUDGET MAINTENANCE WORKSHEET			
Total Allocation		1,068,075.00	
Direct Budgeted		1,068,075.00	
Indirect Limit		0.00	0.000 %
Budgeted		0.00	0.000 %
COFE/FM/GM Docs	/ /		
Comment			
Status	W		

BUDGET MAINTENANCE WORKSHEET			
Total Allocation		1,068,075.00	
Direct Budgeted		1,068,075.00	
Indirect Limit		0.00	0.000 %
Budgeted		0.00	0.000 %
COFE/FM/GM Docs	/ /		
Comment			
Status	B		

Budget Item Description	Line Type	Functional Area Commit Item	Job / Description	Person, Subarea	Position	P Stat	Start / End Date	Hrs/Day Days/Wk	Fund % FTE	Total Cost	Change
107762 TCHR AST DEG TK NW/2	1POSITN	1110-1000-10947 110005	11500953 TEACHER ASST - DEGREE TRA	XXXX	30308511 Name: Ana Lanuza	A	07/01/2024 06/30/2025	6.000 5.000	100.00 1.00	46,187.00	
107762 TCHR AST DEG TK NW/2	1POSITN	1110-1000-10947 110005	11500953 TEACHER ASST - DEGREE TRA	XXXX	30444761 Name: Randy Guerra	A	07/01/2024 06/30/2025	3.000 5.000	100.00 0.50	13,895.00	
107762 TCHR AST DEG TK NW/2	1POSITN	1110-1000-10947 110005	11500953 TEACHER ASST - DEGREE TRA	XXXX	30444761 Name: Randy Guerra	C	07/01/2024 07/01/2024	6.000 5.000	100.00 1.00	0.00	
113029 AST PRN EL BIT 38/05	1POSITN	1110-2700-10947 130001	13100680 ASST PRIN, ELEMENTARY	BSXX	30459552 Name: Alberto Banos	A	07/01/2024 06/30/2025	8.000 5.000	100.00 1.00	190,264.00	

Budget Status:

- **Before WIP (Work in Progress)**
 - Status of the program budget prior to any changes
- **Work in Progress (WIP)**
 - Indicates unapproved budget changes that have been saved in SFE awaiting approvals
 - An "unofficial" saved changed to the budget
- **Submitted**
 - Indicates that the budget adjustment has been reviewed at the school level and submitted for Local District approval
- **Approved**
 - Indicates that the budget adjustment has been reviewed at Local District level and accepted in SFE by the fiscal specialist

School Budget Signature Form

Fund Center	1234501	ABC ELEMENTARY
Fund	010-0000	GF-Unrestricted
LAUSD Program	10947	Academic Excellence
Version / Year	CM0 / 2025	
Grant / Funded	NOT RELEVANT /	OPR00000
Division	RN	REGION NORTH

BUDGET MAINTENANCE WORKSHEET			
Total Allocation		1,160,876.00	
Direct Budgeted		1,160,876.00	
Indirect Limit		0.00	0.000 %
Budgeted		0.00	0.000 %
COFE/FM/GM Docs	/ /		
Comment			
Status	W		

Budget Item Description	Line Type	Functional Area Commit Item	Job / Description	Person. Subarea	Position	P Stat	Start / End Date	Hrs/Day Days/Wk	Fund % FTE	Total Cost	Change
10027 TCHR ELEM C1T 26/10	1POSITN	1110-1000-10947 110001	11100731 ELEMENTARY TEACHER	CSXX	30511208 Name:	A	07/01/2023 06/30/2024	6.000 5.000	100.00 1.00	141,415.00	
100904 TCHR ELEM C1T 27/10	1POSITN	1110-1000-10947 110001	11100731 ELEMENTARY TEACHER	CSXX	30511209 Name:	A	07/01/2023 06/30/2024	6.000 5.000	100.00 1.00	146,665.00	
107762 TCHR AST DEG TK NW/2	1POSITN	1110-1000-10947 110005	11500953 TEACHER ASST - DEGREE TRA	XXXX	N2624044 Name:	A	07/01/2023 06/30/2024	6.000 5.000	100.00 1.00	26,209.00	26,209.00
11368 TSP PRG AD C1T C3/27	1POSITN	1110-2100-10947 190001	19100706 ASMT_NONCLSRM.PREP	CSXX	30511207 Name:	A	07/01/2023 06/30/2024	6.000 5.000	100.00 1.00	155,227.00	
119246 CSR TCHR ELEM 24/10	1POSITN	1110-1000-10947 110001	11100731 ELEMENTARY TEACHER	CSXX	30511210 Name:	A	07/01/2023 06/30/2024	6.000 5.000	100.00 1.00	131,207.00	
13001 TCHR S LIB C1T 27/10	1POSITN	1110-2420-10947 120001	12100591 TCHR,S.LIBR MEDIA	CSXX	30511211 Name:	A	07/01/2023 06/30/2024	6.000 5.000	100.00 1.00	146,665.00	
13454 INSTRL COACH EL C1T	1POSITN	1110-1000-10947 110001	11100843 Instrl Coach, Elem	CSXX	30510969 Name:	A	07/01/2023 06/30/2024	6.000 5.000	20.00 1.00	29,335.00	
14893 INTRVN SUP E TCHR 1T	1POSITN	1110-1000-10947 110001	11100731 ELEMENTARY TEACHER	CSXX	30511212 Name:	A	07/01/2023 06/30/2024	6.000 5.000	100.00 1.00	146,665.00	
10247 DIFF INSTL COACH ELM	20THS-L	1110-1000-10947 110004	Tchr Sal-Supple/Oth				07/01/2023 06/30/2024			377.00	
10376 TUTOR TCHR X TIME	20THS-L	1110-1000-10947 110004	Tchr Sal-Supple/Oth				07/01/2023 06/30/2024			53,791.00	26,209.00-
10562 DDSUB CSR T BEN ABSC	20THS-L	1110-1000-10947 110002	Tchr Sal-Subs				07/01/2023 06/30/2024			7,802.00	
11377 CRD DIFF TSP ADV	20THS-L	1110-2100-10947 190004	Other Cert Sal-Suppl				07/01/2023 06/30/2024			1,570.00	
40005 OTHER BOOKS	30TH-L	1110-1000-10947 420010	Other Books-Gen Purp				07/01/2023 06/30/2024			1,000.00	1,000.00
40227 GENERAL SUPPLIES	30TH-L	1110-1000-10947 430001	General Supplies				07/01/2023 06/30/2024			59,800.00	1,000.00-
40267 IMA	30TH-L	1110-1000-10947 430010	Instr Mat-Gen Purp				07/01/2023 06/30/2024			54,948.00	25,052.00-
40320 POSITION COST INC	30TH-L	1110-1000-10947 430077	Instr Mat-Reimb Obj				07/01/2023 06/30/2024			0.00	25,911.00

School Budget Signature Form

Fund Center	1234501 ABC ELEMENTARY
Fund	010-0000 GF-Unrestricted
LAUSD Program	10947 Academic Excellence
Version / Year	CM0 / 2025
Grant / Funded	NOT RELEVANT / OPR00000
Division	RN REGION NORTH

BUDGET MAINTENANCE WORKSHEET			
Total Allocation		1,160,876.00	
Direct	Budgeted	1,160,876.00	
Indirect	Limit	0.00	0.000 %
	Budgeted	0.00	0.000 %
COFE/FM/GM Docs		/ /	
Comment			
Status		W	

Budget Item Description	Line Type	Functional Area Commit Item	Job / Description	Person. Subarea	Position	P Stat	Start / End Date	Hrs/Day Days/Wk	Fund % FTE	Total Cost	Change
40335 H&W/BENEFIT ADJ	3OTH-L	1110-1000-10947 430009	Instl Mat&Supls-Bud				07/01/2023 06/30/2024			0.00	859.00-
50002 CONTR INSTRL SVC	3OTH-L	1110-1000-10947 580030	ProfSv Contr-GP-Inst				07/01/2023 06/30/2024			19,200.00	
50003 OTH NON INSTRL CONT	3OTH-L	1110-1000-10947 580002	Other Contracts				07/01/2023 06/30/2024			9,000.00	
50174 CURRICULAR TRIPS	3OTH-L	1110-1000-10947 580012	Contract Bus Svcs				07/01/2023 06/30/2024			30,000.00	

School Budget Signature Form

Fund Center	1234501 ABC ELEMENTARY
Fund	010-0000 GF-Unrestricted
LAUSD Program	10947 Academic Excellence
Version / Year	CM0 / 2025
Grant / Funded	NOT RELEVANT / OPR00000
Division	RN REGION NORTH

BUDGET MAINTENANCE WORKSHEET			
Total Allocation		1,160,876.00	
Direct Budgeted		1,160,876.00	
Indirect Limit		0.00	0.000 %
Budgeted		0.00	0.000 %
COFE/FM/GM Docs	/ /		
Comment			
Status		W	

The local district signatures below confirm that the budget request has been reviewed and approved.

The Board of Education has delegated to the general superintendent and the local district superintendents, the responsibility for budget and program decisions based on state and federal laws, collective bargaining unit agreements, Personnel Commission Rules, Human Resources Division Rules and Policies, court orders, consent decree, and LAUSD's Local Control and Accountability Plan (LCAP), if applicable.

The principal's signature below confirms his/her understanding that: (a) the stakeholders had the opportunity to provide recommendations/input during budget planning and development, (b) the Targeted Student Population (TSP) funds will be used to support the English Learners, low income, and foster youth students, and (c) the TSP funds are subject to audit.

Reason: Purchase books and fund TA position support of 5th grade reading program, address position cost increases

FOR SCHOOL SITE USE ONLY

Principal's Signature

Date

When applicable, the signature of the UTLA Chapter Chair indicates that the procedures of Article IV, Section 8.2 a & b have been followed.

UTLA Chapter Chair

Date

Date

FOR BUDGET SERVICES AND LD USE ONLY

BA/Log Sheet No.

Input Date

Processed By

Program Coordinator's Signature

Date

Community of Schools Administrator or Designee's Signature

Date

and/or

Administrator of Operations or Designee's Signature (optional)

Date

Fiscal Specialist's Signature

Date

School Budget Signature Form

Fund Center	1234501 ABC ELEMENTARY
Fund	010-0000 GF-Unrestricted
LAUSD Program	10947 Academic Excellence
Version / Year	CM0 / 2025
Grant / Funded	NOT RELEVANT / OPR00000
Division	RN REGION NORTH

BUDGET MAINTENANCE WORKSHEET			
Total Allocation		1,160,876.00	
Direct	Budgeted	1,160,876.00	
Indirect	Limit	0.00	0.000 %
	Budgeted	0.00	0.000 %
COFE/FM/GM Docs	/ /		
Comment			
Status	W		

"Unit D, Collective Bargaining Agreement, Appendix C, 4.0, b

...Criteria: The identification of individual employees within a department or unit for reassignment shall be based upon consideration of seniority (as defined below) and also consideration of the objective operational needs of the department or unit, such as the need to minimize disruption of services, the need to minimize retraining of the remaining employees, and the need to retain employees who possess special skills and/or expertise. It may also be based upon the avoidance of extraordinary personal hardship to an employee.

Employees who have volunteered for reassignment shall be considered first, subject to and consistent with the above considerations. Reassignment selections are not to be used to evade appropriate progressive disciplinary procedures; however, employees whose performance is marginal or below standard shall remain subject to the above reassignment criteria along with all other employees. For purposes of identification for reassignment, "seniority" means length of regular District service within the classification."

"My signature confirms that I have followed the Unit D Collective Bargaining Agreement criteria set forth above in approving the reassignments resulting from this budget form."

Principal's Signature

Date

Deleting WIPs in SFE

MISTAKE




Deleting the Work in Progress (WIP)

A WIP can be deleted anytime before the approval process.

1. Click *Delete WIP*

School Budget Maintenance



Funds Center1234501ABC ELEMENTARY

SACS Fund/Rsrc010 / 0000General Fund

LAUSD Program10947Academic Excellence

VersionCM0Current Maintenance

Fiscal Year2025

Change TypeSchool Change

StatusWork In Progress

Total Allocation1,068,075.00

Total Budget Amt1,068,075.00

Total Difference0.00

Item Based Detail

Non-Item Based Detail

Approvals

History

Notes

Header Details

Reason

Add New Item Based Detail Line

Line Type

Item

Goal

Function

Position

Temp Position





Clear

Add Entry

Validate Detail

Validate

Line T...	Bud It...	Bud Item Description	Goal	Fu...	Posi...	Cmmt ...	Start Date	End Date	P...	Hr/Day	Day/...	FTE	Fu...	Total Cost	Difference
30TH-L	40005	OTHER BOOKS	1110	1000		420010	07/01/2024	06/30/2025				0.00		1,000.00	1,000.00
30TH-L	40125	NON-CAP EQUIP-OTHER	1110	1000		440001	07/01/2024	06/30/2025				0.00		2,200.00	
30TH-L	40227	GENERAL SUPPLIES	1110	1000		430001	07/01/2024	06/30/2025				0.00		110,996.00	1,000.00-
30TH-L	40239	POTENTIAL FNDING VAR	1110	1000		430098	07/01/2024	06/30/2025				0.00		0.00	
30TH-L	40320	POSITION COST INC	1110	1000		430077	07/01/2024	06/30/2025				0.00			
30TH-L	40339	H&W WC&PERS BENADJ	1110	1000		430009	07/01/2024	06/30/2025				0.00		240.00	
30TH-L	50002	CONTR INSTRL SVC	1110	1000		580030	07/01/2024	06/30/2025				0.00		85,000.00	
30TH-L	60034	EQUIP OTHER, CAPITAL	1110	1000		640001	07/01/2024	06/30/2025				0.00		30,092.00	



Double click on line to display Entry Detail


Entry 20 of 27

Deleting the Work in Progress (WIP)

2. Click *Yes*

School Budget Maintenance

Submit For Approval Warnings Cost Limits Delete WIP

 Funds Center 171234501 SYABC ELEMENTARY
SACS Fund/Rsrc 010 / 0000 General Fund
LAUSD Program 10947 Academic Excellence
Version CM0 Current Maintenance
Fiscal Year 2025

Change Type School Change
Status Work In Progress

Total Allocation 1,068,075.00
Total Budget Amt 1,068,075.00
Total Difference 0.00

Item Based Detail No

Add New Item Based Detail

Line Type Item

Delete Work In Progress (WIP)?

If you delete the Work In Progress (WIP),
all non-approved changes will be lost.

Do you really want to delete the Work In Progress (WIP)?

2 Yes No

Clear Add Entry Validate Detail Validate

Line T...	Bud It...	Bud Item				Day/...	FTE	Fu...	Total Cost	Difference
30TH-L	40005	OTHER BOOKS	1110	1000	420010	07/01/2024 06/30/2025	0.00		1,000.00	1,000.00
30TH-L	40125	NON-CAP EQUIP-OTHER	1110	1000	440001	07/01/2024 06/30/2025	0.00		2,200.00	
30TH-L	40227	GENERAL SUPPLIES	1110	1000	430001	07/01/2024 06/30/2025	0.00		110,996.00	1,000.00-
30TH-L	40239	POTENTIAL FNDING VAR	1110	1000	430098	07/01/2024 06/30/2025	0.00		0.00	
30TH-L	40320	POSITION COST INC	1110	1000	430077	07/01/2024 06/30/2025	0.00			
30TH-L	40339	H&W WC&PERS BENADJ	1110	1000	430009	07/01/2024 06/30/2025	0.00		240.00	
30TH-L	50002	CONTR INSTRL SVC	1110	1000	580030	07/01/2024 06/30/2025	0.00		85,000.00	
30TH-L	60034	EQUIP OTHER, CAPITAL	1110	1000	640001	07/01/2024 06/30/2025	0.00		30,092.00	

Double click on line to display Entry Detail

Entry 20 of 27

Deleting the Work in Progress (WIP)

School Budget Planning and Maintenance

School Budget Planning and Maintenance

Funds Center 1234501 ABC ELEMENTARY
SACS Fund 010 General Fund
LAUSD Program 10947 Academic Excellence

List All Authorized Clear Selection Criteria Save Selection Criteria

Task

	Version	Fiscal Year	Locks
Budget Planning	FIN0 Final Version	2025	Locked
Budget Maintenance	CM0 Current Maintena...	2025	

Reports Justification Administration Message

Budget Report	Archive Report	School Resource Allocation
Signature Form	Archived Signature Form	General Fund Allocation Report
Signature Form With Print Range	COFE Budget Report	Staffing and Resources
Progress Report	School Discretionary Programs Rep	School Budget Summary
Budget With Incumbent Report	Estimated Rates By Budget Item	Cost Limits
Position With Incumbent Report	Employee Assignment Cost	Furlough Savings Report

☒ Budget Work In Progress (WIP) was deleted

Result



Manual Budget Adjustment

Los Angeles Unified School District
Budget Services and Financial Planning Division

BUDGET ADJUSTMENT REQUEST

Fiscal Year 2024-25

School/Office _____ Region _____ Phone No. _____ Contact Person _____ Date _____

REQUIRED ONLY FOR POSITIONS																											
GC*	Fund Center	Fund		Functional Area			Budget Item	Commitment Item	Date		Job	Position Status	Temp Position ID	Position Control #	ES	Personnel		Pay Scale			Pos Ind	Rate	Hrs / Day	Days / Week	FTE	Amount (\$)	
Budget Line Item	Fund Center Name	Fund	Resource	Goal	Function	Program	Item Name		Start	End			Title		CAP	Area	Sub Area	Area	Group	Level	Type	Misc	Salary	Benefits	Funding (%)	From	To
1																											
2																											
Document Total																								-	-		

Reason for budget adjustment: (For Categorical Programs, justification pages must be attached.)

I understand that I shall be fully responsible for any program and/or fiscal implications of this request due to non-compliance with Federal/State policies, rules and regulations. The signatures below confirm that this request has been reviewed for compliance.

FOR SCHOOL SITE USE ONLY	
Principal's Signature _____	Date _____
For Categorical Programs: Attach the following two documents:	
<input type="checkbox"/> Copy of School Plan Page or Single Plan for Student Achievement Modification	
<input type="checkbox"/> If multi-funded, please indicate other funding source(s):	
Budget Adjustment for Title I Program, please identify:	
<input type="checkbox"/> TAS <input type="checkbox"/> SWP	
When applicable, the signature of the UTLA Chapter Chair indicates that the procedures of Article IV, Section 3.2 a & b have been followed	
The SSC sought and considered recommendation from the appropriate advisory committee.	
UTLA Chapter Chair _____	Date _____
SSC Date _____	ELAC Date _____
Form revised 10-04-2023	

FOR BUDGET SERVICES AND REGIONAL USE ONLY			
BA/Log Sheet No. _____	Input Date _____	Regional Director _____	Date _____
Processed By _____		and/or	
		Administrator of Operations or Designee _____	Date _____
Fiscal Specialist's Signature _____	Date _____	Program Coordinator's Signature or Designee _____	Date _____
Fiscal Services Manager's Signature _____	Date _____	Asst. Budget Director _____	Date _____
		Deputy Budget Director _____	Date _____

FOR GRANTS INCLUDE:
1. Administrative Service Charge (ASC) of 3.15%, commitment item 730001.
Calculation:
a) Total Grant Amount - Capital Outlay = Net Grant Amount
b) Net Grant Amount/1.0315 = Amount Subject to ASC
2. Funding Variance (5% of Salaries & Benefits), commitment item 430098

...Criteria: The identification of individual employees within a department or unit for reassignment shall be based upon consideration of seniority (as defined below) and also consideration of the objective operational needs of the department or unit, such as the need to minimize disruption of services, the need to minimize retraining of the remaining employees, and the need to retain employees. Employees who have volunteered for reassignment shall be considered first, subject to and consistent with the above considerations. Reassignment selections are not to be used to evade appropriate progressive disciplinary procedures; however, employees whose performance is marginal or below standard shall remain subject to the above reassignment criteria along with all other employees. "My signature confirms that I have considered and relied upon the criteria set forth above in approving the reassignments resulting from this budget form."

Principal's Signature _____ Date _____

Key Concepts

Tips and Reminders

- Enter only whole numbers, no cents
- Get in the habit of saving your entries. If it is left idle for a long period of time, entries will be lost
- Information can only be entered in white fields. Blue fields are locked and cannot be edited.
- Use the Estimate Rates Sheet to look for item numbers. Filter by job code.
- Slashes are not necessary when entering dates
- Use the *Warning* and *Cost Limits* features or buttons in SFE, if applicable
- Verify available balances against the Budget Availability report and Control Sheets prior to processing a budget adjustment
- The total funding percentage of a position should be 100% across programs
- Budget adjustments must balance, *Total Difference* should be zero.

Regional Fiscal Staff





Questions?