

Procedure:  <b>Maintenance of a Budget Data set of Positions in SMS</b>	Policy: <b>Grant Budgeting</b>		Number: <b>GP0200.7</b>
	<input type="checkbox"/> Complete Revision <input checked="" type="checkbox"/> Partial Revision <input type="checkbox"/> New	Supersedes: <b>7/1/2018</b>	Page: <b>Page 1 of 2</b>

**Overview of Procedure**

A single repository of budgeted positions is required to be maintained in order to produce accurate budget to on-board position actual reports. Such reporting is essential for the District to stay within budget or, if over-budgeted, an opportunity to make adjustments. Also, position budget to actual reports are an important management tool for program managers at all levels of the organization. The Financial / Human Resource (HR) system does not contain a mechanism to store budgeted position data sets. Therefore, the Staffing Management System (SMS), originally designed to facilitate the school budgeting process only, is the database in which school and central office budgeted position data sets will be maintained.

There are two categories of position approvals in the District and three broad categories of budgeted position data sets maintained in SMS:

1. Non-Job Requisition Positions
  - A. School based positions allocated through a formula (all funds) and loaded into SMS pursuant to the school budget process.
  - B. Central office budgeted positions allocated to schools that spend most, if not all, of their time in schools. Examples are Operating Cleaners and trades positions, transportation personnel. Etc. These positions are loaded into SMS in order to create a complete data set.
2. Job Requisition Positions
  - C. Central Office budgeted administrative positions, even if the positions spend a significant portion of time in schools. Many grant funds have this attribute.

**Procedure Details**

The following steps outline the procedures for entering positions approved through the Job Requisition (Job Req.) system into SMS after the job requisition has received final approval and been sent to HR for processing. The purpose of these procedures is to ensure that all positions that have received final approval in the Job Requisition System have been entered into SMS.

**Procedure Steps**

RESPONSIBLE POSITION	Step	ACTION TAKEN
GFS Director (or designee)	1	The Director will run a report entitled Job Req. Ready for HR(2) within the first 10 days of the month after the end of each quarter. The report will provide the position description and ABC code for all positions receiving final approval in the Job Requisition System, regardless of fund, and then automatically sent to HR. This report will then be sent to all Grant Budget Analysts (GBAs) with grants listed on the report.
GBA	2	The GBAs will reconcile the report with the existing SMS content and enter new positions into SMS by the 15th of the month.
GFS Director (or designee)	3	After GBA entry, the Director will run a report against the SMS system entitled -Allotted positions. This list will be compared to the Job Req. Ready for HR(2) list generated from step 1 with all differences resolved.

**Policy**

- *GP0200: Grant Budgeting*

**Forms**

- *Reports*

**Definitions**

**Contacts**

- *Grant Fiscal Services*
- *Office of Management and Budget*

**Frequently Asked Questions**

**Related Information**

**History**

- Created on November 16, 2015.
- Amended May 21, 2018 for technical updates.
- Updated June 2021 to be consistent with current practices.

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