



Operating Budget User Manual

Carroll County Public Schools
125 North Court St.
Westminster, Md. 21157
Phone 410-751-3115

BUDGET REQUEST ENTRY

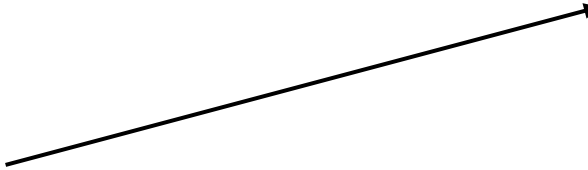
- 1) In the upper left corner, click “Main Menu”, then “Budget Preparation”, then “Entry & Processing”, and then “Budget Entry”.

The screenshot displays the eFinancePLUS application interface. At the top left, the logo for PLUS 360 and the text "eFinancePLUS a PLUS 360 Application" are visible. To the right of the logo, the text "eFinancePlus - CARROLL COUNTY PUBLIC SCHOOLS V5.1" is displayed. Below the header, there is a search bar and a "Main Menu" dropdown. The main menu is open, showing a list of options: "Budget Preparation", "Entry & Processing", "Reports", and "Reference Tables". The "Budget Preparation" option is selected, and its sub-menu is displayed, showing "Budget Administrator", "Budget Entry", and "Miscellaneous". The "Budget Entry" option is highlighted, and an arrow points to it from the right. The bottom of the screen shows the text "Version 5.1" on the left and "CARROLL COUNTY PU" on the right.

2) Under “Expenditure”, click “Requested”



Expenditure	Revenue	Project
<input type="button" value="Requested"/>	<input type="button" value="Requested"/>	<input type="button" value="Requested"/>
<input type="button" value="Recommended"/>	<input type="button" value="Recommended"/>	<input type="button" value="Recommended"/>
<input type="button" value="Approved"/>	<input type="button" value="Approved"/>	<input type="button" value="Approved"/>
<input type="button" value="Future Years"/>	<input type="button" value="Future Years"/>	<input type="button" value="Future Years"/>



3) For “FINANCIAL CODE”, type the first four (4) digits of the desired code or set of codes, type an asterisk (*), and type the three-digit Cost Center number, e.g. 1116*057, and press “TAB” key

For “Account”, leave it blank for all accounts, or enter a specific account if desired, and click “OK”

Note: To enter the budget for a single line item, enter the complete 16 digit Financial Code and 3-digit Account



Search Criteria

FINANCIAL CODE	<input type="text" value="1116*057"/>	<input type="text"/>	CATEGORY	<input type="text"/>
Account	<input type="text"/>	<input type="text"/>	PROGRAM	<input type="text"/>
Budget FINANCIAL CODE	<input type="text"/>	<input type="text"/>	SERVICE AREA	<input type="text"/>
Budget Account	<input type="text"/>	<input type="text"/>	ACTIVITY	<input type="text"/>
Freeze	<input type="text"/>	<input type="text"/>	PROJECT	<input type="text"/>
FUND	<input type="text"/>	<input type="text"/>	COST CENTER	<input type="text"/>
CLASSIFICATION	<input type="text"/>	<input type="text"/>		

FINANCIAL CODE	Account	Requested Base	Requested New

- 4) In the “REQUESTED BASE” field, type in an amount and Click “OK”
Please keep amounts in whole dollars.

Details

Search Criteria

FINANCIAL CODE	1116*057	SEARCH	CATEGORY	
Account		SEARCH	PROGRAM	
Budget FINANCIAL CODE		SEARCH	SERVICE AREA	
Budget Account		SEARCH	ACTIVITY	
Freeze			PROJECT	
FUND			COST CENTER	
CLASSIFICATION				

Find
 Advanced

FINANCIAL CODE	Account	Requested Base	Requested New	Curre
1116010100000057	308	0.00 X	0.00	
1116010100000057	322	0.00	0.00	
1116010100000057	325	0.00	0.00	
1116010100000057	328	0.00	0.00	
1116010100000057	329	0.00	0.00	
1116010100000057	399	0.00	0.00	
1116010200000057	308	0.00	0.00	
1116010200000057	311	0.00	0.00	

Please note the following:

- Budgets must be entered in “Requested Base” field unless you are specifically directed otherwise by Budget office staff
- You must Click “OK” to save the budgets you have entered
- You can scroll down through the listing if it is longer than what appears on the screen.
- Totals at the bottom of the listing are updated after you Click “OK”

ENTERING EXPLANATIONS AND/OR JUSTIFICATIONS

5) Click on the symbol that looks like a note pad/pencil.

Expenditure Budget Process - Requested - CARROLL COUNTY PUBLIC SCHOOLS V5.1 - Internet Ex

eFinancePLUS
a PLUS 360 Application

Expenditure Budget Process - Requested -

Details

Search Criteria

FINANCIAL CODE	<input type="text" value="1116*057"/>	CATEGORY
Account	<input type="text"/>	PROGRAM
Budget FINANCIAL CODE	<input type="text"/>	SERVICE ARE
Budget Account	<input type="text"/>	ACTIVITY
Freeze	<input type="text"/>	PROJECT
FUND	<input type="text"/>	COST CENTE
CLASSIFICATION	<input type="text"/>	

Find
 Advanced

FINANCIAL CODE	Account	Requested Base	Requested New
1116010100000057	308	0.00 X	
1116010100000057	322	0.00	
1116010100000057	325	0.00	
1116010100000057	328	0.00	






- 6) The Notes screen will open. Enter an explanation, justification, or description, and an amount. You can have one or multiple lines of detail.

Notes - CARROLL COUNTY PUBLIC SCHOOLS V5.1 - Internet Explorer

PLUS 360 eFinancePLUS
a PLUS 360 Application

Notes - CARROLL COUNTY PUBLIC SCHOOLS V5.1

Insert Row Delete Row

FINANCIAL CODE INST PGM-ENGLISH
Account GENERAL SUPPLIES

Notes	Amount	
SUPPLIES FOR ENGLISH	1500.00 X	

Total Budget

Update Requested Base Total

When finished, click “OK” once, click on “Update Requested Base Total” to set “Requested Base” budget to equal the “Total Budget” entered here on the Notes screen, and click “OK” to save entries and return to main budget entry screen.

REQUESTED WORKSHEET - FOR SCHOOLS ONLY

Others should use the 'PRINTING BUDGET REQUEST WORKSHEETS' (P.15)

The following steps should be followed when trying to complete the FY 20 budget allocation.

- 1) Go to the eFinance Resource Center.
- 2) Click on the 'Reporting' link at the top.
- 3) From the drop down menu, click on 'School Reports'.

The screenshot shows the eFinancePLUS Resource Center interface. At the top, there is a navigation bar with links for Home, Resources, Reporting, Applications, Utilities, and Admin. The Reporting link is highlighted, and a dropdown menu is open, listing various report categories: Audit Reports, Budget Reports, Finance Reports, Human Resources Reports, Payroll Reports, Purchasing Reports, and School Reports. The School Reports option is highlighted in blue. Below the navigation bar, there is a section titled 'My Top 5 Reports' which lists several reports with their respective counts: Position C (572), Fund 1 Detail Expenditure Status Report (243), Fund 1 Requested Worksheet (180), Grant Financial Status (56), and Fund 2 Balance Report (17). The URL at the bottom of the page is https://ccpsportal.ccps.wan/efpcenter/reports/rpt_menu.aspx?categoryID=6.

Click on 'Requested Worksheet'.

The screenshot shows the FinancePLUS Resource Center interface. At the top, there is a dark green header with the text "FinancePLUS Resource Center". Below this is a dark navigation bar with the following items: "Resources" (with a magnifying glass icon), "Reporting" (with a bar chart icon), "Applications" (with a document icon), "Utilities" (with a wrench icon), and "Admin" (with a gear icon). Below the navigation bar is a light green section titled "School Reports". This section contains four report cards. The first card is "Detail Fixed Assets Listing" with a description: "Shows the status of each inventory item at each school. Used by all schools all of the time." The second card is "Fund 2 Balance Report" with a description: "Shows the balance and totals in school-based fund 2/athletic accounts. This report is used daily by the Finance Office and every school." The third card is "Fund 1 Detail Expenditure Status Report" with a description: "Shows the Fund 1 balance for each school. This report is used by the Finance Office and every school." The fourth card is "Requested Worksheet" with a description: "Show budgeted and actual expenses. Very helpful for schools to create their new budgets." This fourth card is highlighted in a light green color. A blue arrow points from the "Requested Worksheet" card back to the "School Reports" header. At the bottom of the page, there is a dark grey footer with the text "© Carroll County Public Schools".

FinancePLUS Resource Center

Resources Reporting Applications Utilities Admin

School Reports

Detail Fixed Assets Listing
Shows the status of each inventory item at each school. Used by all schools all of the time.

Fund 2 Balance Report
Shows the balance and totals in school-based fund 2/athletic accounts. This report is used daily by the Finance Office and every school.

Fund 1 Detail Expenditure Status Report
Shows the Fund 1 balance for each school. This report is used by the Finance Office and every school.

Requested Worksheet
Show budgeted and actual expenses. Very helpful for schools to create their new budgets.

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Select your school 'Cost Center' from the drop down menu.

Click on 'Run Report'.

eFinancePLUS Resource Center

Home Resources Reporting Applications Utilities Admin

Fund 1 Requested Worksheet Criteria:

Cost Center: Administrative Services

Filter Categories:

- Criteria
- Run Report

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When the data is displayed click on 'Export to Excel'.

eFinancePLUS Resource Center

Home Resources Reporting Applications Utilities Admin

Fund 1 Requested Worksheet Criteria:

Cost Center: Liberty High School

Filter Categories: Criteria

Run Report

Fund 1 Requested Worksheet Results

Export to Excel

Organization	Budget Acct	Organization Title	Account Name
1102020000000057	102	ALL OTHER EDUCATIONAL SER	NON INSTR HOURLY CLASSIFI
1102012000000057	102	ALL OTHER EDUCATIONAL SER	NON INSTR HOURLY CLASSIFI

You will be asked whether you want to 'Open' or 'Save' the file. Click on 'Open'.

Once the Excel document opens, Click on 'Enable Editing' at the top in the yellow bar.

Then save the document in a convenient location in order to create your budget.

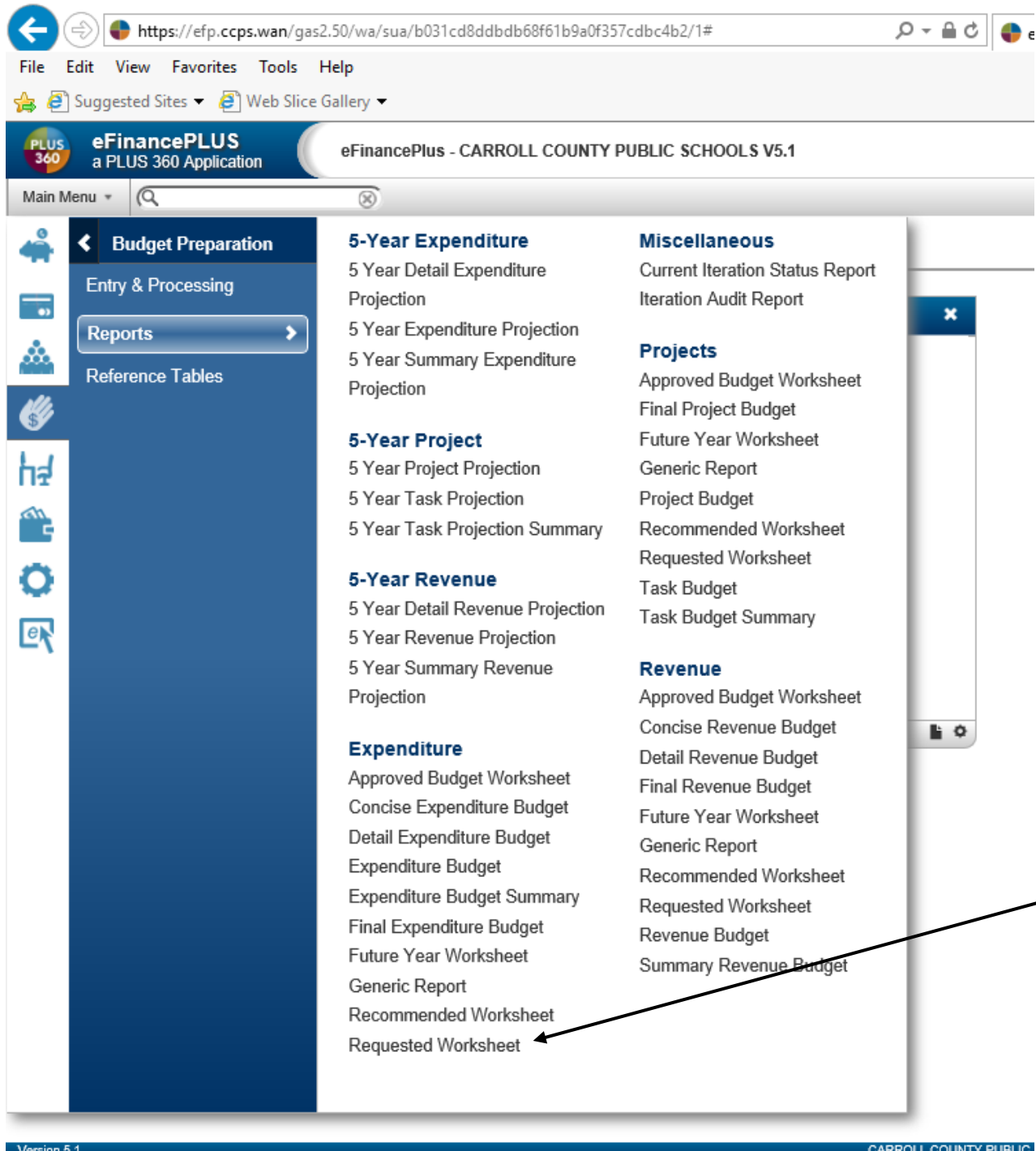
This document provides prior year budget and actuals [FY 18], and current year budget and YTD actuals [FY 19]. These figures should be very helpful when deciding on the requested budget for FY 20.

	A	B	C	D	E	F	G	H	I
1	Organization	Budget Acct	Organization Title	Account Name	PY Budget	PY Actual	CY Budget	YTD Exp + Enc	Requested Base
2	110202000000057	102	ALL OTHER EDUCATIONAL SER	NON INSTR HOURLY CLASSIFI	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
3	110201200000057	102	ALL OTHER EDUCATIONAL SER	NON INSTR HOURLY CLASSIFI	\$11,556.00	\$0.00	\$11,556.00	\$0.00	\$0.00
4	110201200000057	141	ALL OTHER EDUCATIONAL SER	INSTR ASST TEMPORARY	\$0.00	\$353.39	\$0.00	\$0.00	\$0.00
5	110201040000057	141	SCIENCE	INSTR ASST TEMPORARY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
6	110202000000057	141	ALL OTHER EDUCATIONAL SER	INSTR ASST TEMPORARY	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
7	110202000000057	161	ALL OTHER EDUCATIONAL SER	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
8	1102040101029057	161	AGRICULTURE PRODUCTION	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
9	1102040301029057	161	COOPERATIVE	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
10	1102040504000057	161	CONSUMER & HOMEMAKING	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
11	1102040704029057	161	BUS ADMINS/MANAGEMENT	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
12	1102040804029057	161	CAREER/VSSST DISADVAN	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
13	1102100100000057	161	INST SAL/GUIDAN/COUNSEL	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
14	1102010400000057	161	SCIENCE	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
15	1102010500000057	161	FOREIGN LANGUAGE	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
16	1102010600000057	161	ART	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
17	1102010700000057	161	PHYSICAL EDUCATION	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
18	1102010800000057	161	MUSIC	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
19	1102011400000057	161	HEALTH	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
20	1102011500000057	161	TECHNOLOGY EDUCATION	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
21	1102012000000057	161	ALL OTHER EDUCATIONAL SER	TEACHER HOURLY/TEMP	\$0.00	\$371.25	\$0.00	\$0.00	\$0.00
22	1102013701000057	161	EXTRA-CURRIC ATHLETIC	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
23	1102010100000057	161	ENGLISH LANGUAGE ARTS	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
24	1102010200000057	161	SOCIAL STUDIES	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
25	1102010300000057	161	MATHEMATICS	TEACHER HOURLY/TEMP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
26	Sub Totals:				\$11,556.00	\$724.64	\$11,556.00	\$0.00	\$0.00
27	1104000000000057	201	HEALTH SERVICES	MAINT. & REPAIR OF EQUIP	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
28	1104000000000057	299	HEALTH SERVICES	OTHER CONTRACTED SERVICES	\$0.00	\$30.52	\$0.00	\$0.00	\$0.00
29	1104000000000057	313	HEALTH SERVICES	HEALTH ROOM SUPPLIES	\$2,000.00	\$1,704.98	\$2,000.00	\$1,199.31	\$0.00
30	1104000000000057	314	HEALTH SERVICES	FOOD FOR HUMAN CONSUPTION	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
31	1104000000000057	399	HEALTH SERVICES	OTHER NON-INSTR SUP & MAT	\$0.00	\$43.78	\$0.00	\$0.00	\$0.00

PRINTING BUDGET REQUEST WORKSHEETS

This will work for all cost centers, but schools should use the 'REQUESTED WORKSHEET – FOR SCHOOLS ONLY (P.9)'

7) In the upper left corner, click “Main Menu”, then “Budget Preparation”, then “Reports”, then “Expenditure”, and then double-click “Requested Worksheet”.



8) For “FINANCIAL CODE”, type the first four (4) digits of the desired code or set of codes, type an asterisk (*), and type the three-digit Cost Center number, e.g. 1116*057, and press “ENTER” key. This will take the cursor to the bottom section. Then click on the button next to “Print Notes and Amounts” and hit “ENTER”.

For “Account”, leave it blank to get all accounts, or enter a specific account if desired, and click “OK”

Select “Print Notes and Amounts” and Click “OK”

Requested Expenditure Worksheet - CARROLL COUNTY PUBLIC SCHOOLS V5.1 - Internet Explorer

PLUS 360 eFinancePLUS
a PLUS 360 Application

Requested Expenditure Worksheet - CARROLL COUNTY PUBLIC SCHOOLS V5.1

Report Information
This report lists the Expenditure Requested worksheet.

Report Criteria

FINANCIAL CODE 1116*057

Account

FUND

CLASSIFICATION

CATEGORY

PROGRAM

SERVICE AREA

ACTIVITY

PROJECT

COST CENTER

Advanced

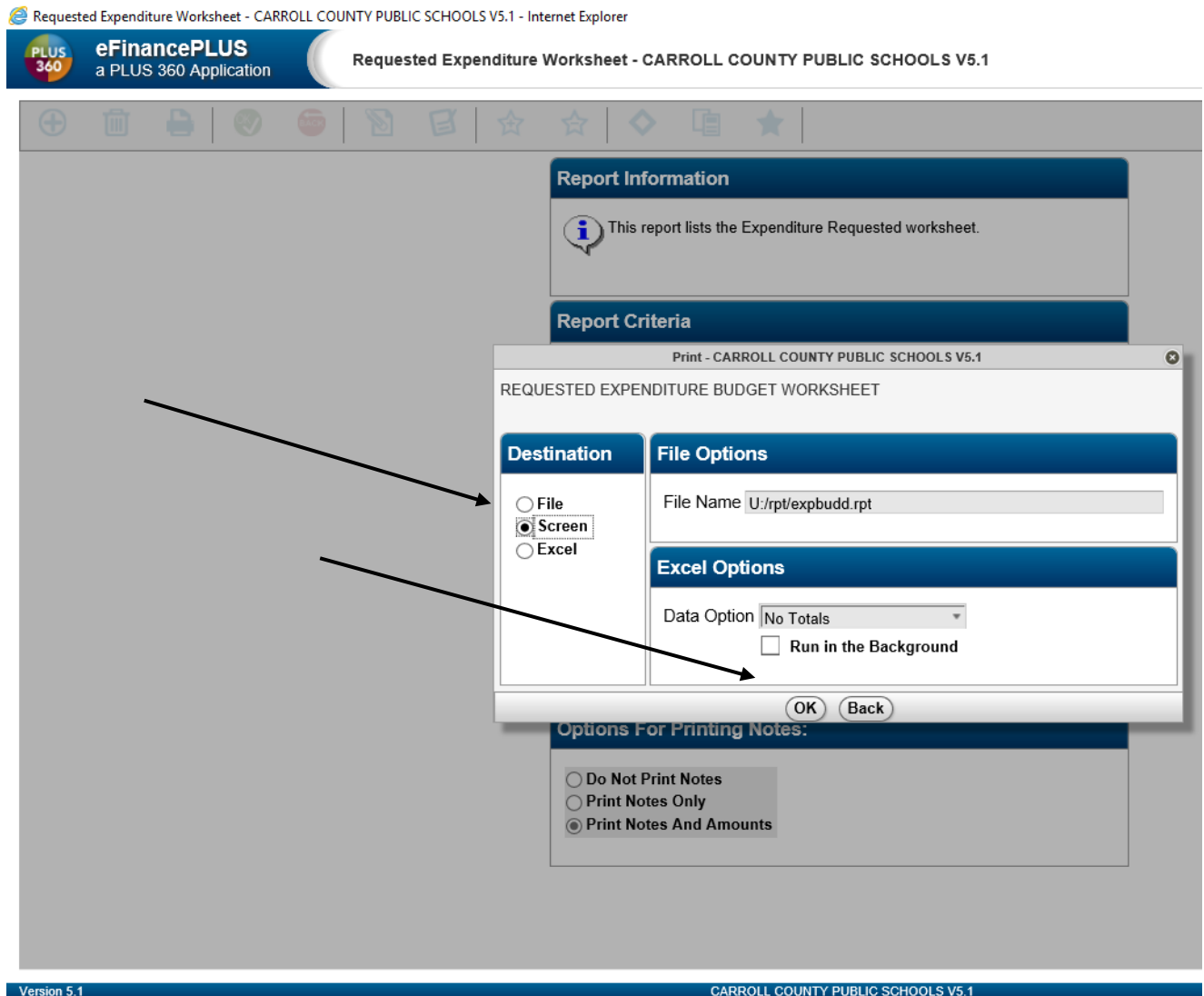
Options For Printing Notes:

Do Not Print Notes

Print Notes Only

Print Notes And Amounts

9) Select “Screen” and then hit “OK”



Adobe Acrobat Reader will open, and the document will be displayed. It can then be printed or saved just like any Adobe “PDF” style document.

For additional assistance, contact the Budget Office

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