

Program Description

The Employment/Budget Authorization Program (EBAP) is designed to handle budget requests pertaining to employment. The program handles requests for new positions, a change in employment status, and the hiring of replacement employees.

The primary objectives of the program are:

- To reduce the time it takes between requesting an authorization and obtaining approval by speeding up the flow of information from the requestor, approvers, and the budget and human resources departments.
- To reduce the dependence on paper forms, specifically the carbon copy forms currently in use.
- To maintain accurate records of the requests as well as the changes made to them.
- To better manage the communications between all parties involved in the request.

General Program Functionality

Logging In

Users will be unable to use the EBAP program without logging in using the ‘Log In’ link on the top right side of the screen. The user name and password is the same that users use to log into their computers (your Active Directory AD or NT Account).

Use the Log In Link to log into the system



Given the program objectives, the EBAP gathers budget request information from the requestor and streamlines the approval process by automatically emailing approvers when the request is awaiting their approval. The process flow is as follows:

1. The requestor fills out the request for authorization in 5 easy steps and submits the request.
 - a. A list of approvers is created based on the budget account number(s) affected.

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- b. If the requestor is not the originator, the originator is emailed a link to review, edit, and approve the request.
2. The first approver is emailed a link to review, edit, and approve or deny the request. Assuming the approver approves the request, subsequent approvers are also emailed links to review, edit, and approve or deny the request.
 - a. If a request is denied, an email is sent to everyone who has already approved the request stating the request has been denied and providing a link to review the request.
 - b. The requestor is emailed a link to edit the request and resubmit the request. On a resubmit, all prior approvals are cleared and the approval process starts over.
3. Once the final approval has been made, an email is sent to all approvers, as well as the requestor and the originator informing them that the request has been approved. A link is provided for users to print a copy if they wish for their records.

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Detailed Program Functionality

Submitting the Request

The request is filled out in a five-step process. The information for each step is detailed below.

Step 1 – Request Information

Choose the request type and fill out the information relating to the request.

1. New Position
 - a. Comments
2. Hire For Replacement
 - a. Replace Employee #/Name – The employee number of the employee for which the request is being created. If the employee number is not available, please enter the employee name beginning with the last name. A list of employees will be displayed and the employee can then be picked from the list. After entering the employee number or picking the employee by their name, click on the ‘Get Info’ button to get information about the employee.
 - b. Last Day Paid Status
 - c. Comments (*optional*) - Any comments regarding the creation of this position
3. Change of Status
 - a. Employee #/Name - The employee number of the employee for which the request is being created. . If the employee number is not available, please enter the employee name beginning with the last name. A list of employees will be displayed and the employee can then be picked from the list. After entering the employee number or picking the employee by their name, click on the ‘Get Info’ button to get information about the employee.
 - b. Change Description (*optional*) – What is being changed
 - c. Effective Date – The date the change takes effect.
 - d. Comments - Any comments regarding the creation of this position

Step 2 – Position Information

Fill out the information about the position. This page will reflect the new status for a change of status, as well as the status for a replacement or new position.

1. Position Title - If this is a new position, choose the title. If it is a replacement or change of status, the title will default to the selected employee’s primary title.
2. Months/Year – months worked per year
3. Track Assignment (*optional*) – School track code
4. Shift Differential (*optional*) – Choose whether this position gets shift differential

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5. Date Needed (*optional*)
6. Start Time – can entered or picked from a list (*optional*)
7. End Time – can entered or picked from a list (*optional*)
8. Hours Per Day – cannot be more than 8 hours
9. Total FTE – the decimal representing how much FTE this position represents (0.1 – 1.6). For classified positions, where the hours per day four is or more the FTE is required. For certificated positions the FTE is always required.
10. Comments or Special Requirements (*optional*)

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Step 3 – Accounting Information

This is the budget account information. Check the budget account numbers carefully as an incorrect account number could lead to a denial of the request.

1. Account Number – the budget account number that is assigned to this position.
2. Position Title – either the new position selected or the position of the replaced/changed employee.
3. Funding % - The percent of the employee’s time that the row represents. All rows must add up to 100%.
4. Hours/Day – The number of hours assigned to each row.
5. Type-Title-Sequence (*optional*)

In the system, for current RUSD employees, this step is broken up into two sections. The top portion allows users to add, edit, or delete the budget account information. The second section (visible again for current RUSD employees only) lists position information for the employee as it currently exists in galaxy at the time of the submission. Using both sections enables users to view all account changes in the system.

Edit- press this button to make changes

Del - deletes the entire row

Section 1 Make Changes Here

Step 3 of 5

Enter account changes:

Row	Account Number	Position Title	Funding %	Hrs/Day	Type-Title-Seq		
1	00-000-0000-0-0000-0000-0000	ACCOUNT CLERK I - CLASSIFIED	100.00	8	1 001 001	Del	Edit

Add new account info here:

Choose Save Cancel

<< Back Next >>

Insert a new row/Save Changes

Information from Galaxy Personnel before EBA Request submission (for reference only):

Account Number	Position Title	Funding %	Hrs/Day	Type-Title-Seq
00-000-0000-0-0000-0000-0000	ACCOUNT CLERK I - CLASSIFIED	100.00	6	

Step 4 – Authorization Information

Enter the first approver by typing the approver’s name in the last name, first name format and then choose the approver from the list that is displayed. Once the request is submitted, this person will be first one to review and approve the request.

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Step 4 of 5

Authorizations

Requestor	Requestor Name	Email:	@rusd.k12.ca.us
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Please enter the 1st approver using their last name.

1st Approver

List Last Name, First Name (Employee ID)

Authorization Information

Approver	Email Address	Status
Budget Department	_BudgetTeam@rusd.k12.ca.us	Needs Approval
Fine, Michael (160446)	mfine@rusd.k12.ca.us	Needs Approval
Grad El Maria, Delia (219227)	dgradelmari@rusd.k12.ca.us	Needs Approval
Conner, Vanessa (59197)	vconner@rusd.k12.ca.us	Needs Approval

<< Prev Next >>

Choose the first approver by typing the last name. Then choose the employee from the list.

The authorization information is automatically filled out based on the account numbers specified in step 3. If it is a new position, then Michael Fine is added to the list.

Step 5 – Submit Request

Review the information entered for accuracy. Click the “Edit” button in each section to edit that step. When the request is completed, click the “Submit” button to submit the request for approval. Clicking the “Cancel” button will cancel the request permanently.

Please note that the total hours in step 3 are compared to the hours/day in step 2 (if entered). If they do not match, a warning is displayed. However, users can still submit or cancel the request.

Approving the Request

Once the request has been submitted, it is sent to the originator for approval. The originator will follow the email link to review the request. To approve the request, the originator clicks the “Originator Approval” button.

Once the originator has approved it, it is sent to each subsequent approver for approval. To approve the request, click the “Approve” button next to the approver name. The approver will be prompted for their password. Enter the password and click “Approve” to approve the request.

Any approver may edit the request until it has been approved by the budget manager. At that point, the account numbers may no longer be edited.

The final approver is the human resources department. Once HR has approved the request, it is locked for future editing. The requestor, originator, and all approvers are sent an email informing them that the request has been approved.

Denying the Request

A request may be edited at anytime along the process. Therefore, it is preferential to edit and correct any discrepancies rather than deny the request due to inaccurate information.

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If there is a need to deny the request, an approver may click the “Deny” button next to the approver name. The approver will be prompted for their reason for the denial.

Upon denial, the originator and every prior approver will be sent an email informing them of the denial, who it was denied by, and the reason given for the denial. The requestor and first approver will be sent a similar email along with a link that enables them to correct the request and resubmit it if applicable.

Upon resubmission, the approver list is recreated and all approvers must re-approve the request.

Major Changes

During the approval routing, any major changes listed below will reset the approval routing and users will have review and resubmit the request. The request will then be sent to the first approver for approval. Below is a list of major changes that can trigger a resubmit during the approval routing process:

1. Changing the request type in step 1 of the request
2. Modifying the employee for which the request was originally submitted for also in step 1 of the request
3. Changing the position title in step 2
4. Modifying the resource portion of any of the account number(s) in step 3 of the request

Checking the Status of a request

A user may check on the status of a report by clicking ‘Check Request Status’ from the main menu. Enter the budget request number that was provided when the request was submitted and click ‘Submit’. In addition if the user is a requestor or approver for the request, the user can click on the view link to see any changes made to the request after the submission.

Approver Login

Approvers may login to see all requests that they are an approver for. To login, click “Approver Login” from the main menu. Enter your approver password and click ‘Login’.

You can filter the list of requests by pending, approved, or denied requests and by changing the “Submitted After” date. Click on the request number to view the request in a new window.

Search Page

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The new search page allows you to search requests based on various information. Users can only search on requests for which they are a requestor or an approver for. Please enter as much information as possible to limit the results of the search.

Alternate Approver

This option is only available to users who approve requests based on assigned resource codes. These approvers can set alternate employees to approve requests while they are out of the office for a given date range. Once an alternate is set, a notification is sent via email to the approver, alternate approver, and the budget team. Notifications are also sent for any changes or removal of an alternate approver.