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| *SBS BUDGETING SOFTWARE FLOWCHART WHAT DO I DO NEXT?* | | | | | | | | |
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| **ACTIVATE ACCOUNT (new users only)**  User name and password provided by SBS User Guidance Pages 2-7   |  | | --- | |  | |  |  | |  |  |  |  |  |
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|  |  |  | |  |  | **DASHBOARD**  Check User Details & Updates |  |  |
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|  |  |  | |  |  | **SETTINGS CHECKS** |  |  |
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|  | **Service Terms**  Settings > Budgets > Edit > Staff Contract Settings |  | |  |  |  |  |  |
|  |  | **Teacher Payscales**  Staffing > Salary Scales | |  |  |  |  | **Staffing Inflation & Pension Rates**  Staffing > Inflation & Superannuation |
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|  | **UPDATE STAFF MEMBERS**  Staffing > Staff Members > select Contract Name |  | |  |  |  |  |  |
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| **Pupil Numbers**  As previous Oct census and future forecasts | **PLANNING**  )  **Funding Predictor**  Check against LA funding figures |  | | **Income Calculator**  Examples EYSFF, Teacher Pay Grant |  |  |  | **Budget Entries**  Planning > Budget Entries  (for Income & Expenditure,  Revenue & Capital) |
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|  | **KEY CHECKS**  Reports > General Reports > Budget Overview |  | |  |  |  |  |  | | |
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|  | **PRODUCE REPORTS**  Reporting >  CFR Summary for LA |  | |  |  |  |  |  |
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|  | **FIX BUDGET**  Settings > Budgets > Select Budget > Cog icon > Fix |  | |  |  |  |  |  |
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| **PUBLISH BUDGET**  Settings > Budgets > Select Budget > Cog icon > Publish | | | | | | | | | |
| ? Help icon on each page and at bottom left hand corner.  OR  Connect to SBS Assist by icon or the assist on the top of each page. | | | | | | | | | |
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| * For Finance assistance contact your link officer * For technical assistance contact SBS Budgets 0345 222 1551 Option 8 | | | | | | | | | |

Schools Finance Team

February 2023