**SBS ONLINE NEW PORTAL GUIDANCE - 2025-26 BUDGETS – Part 2**

**SETTINGS cont.**

* **Overview – Opening Balances**
* Both Revenue and Capital Brought Forward Balances need to be updated and/or added here.
	+ Click Overview > Slide mouse over to the right > Select Opening Balances
	+ Either edit or add by choosing Revenue or Capital (Use balances as recorded on the Year End Statement)
	+ Revenue Balances can be split into committed balances, which include NTP, Recovery Pupil Premium and PE & Sports 2024-25 remaining balances and the ‘Uncommitted Balance’

**Getting started on STAFFING**

Staff Data:

* Staff should already be in SBS from last year’s scenario/budget - required to update joiners and leavers in the new year. Start with your teachers who have left and started in September 2024. Then move on to updating Support staff.
* Click Staffing > Slide mouse over to the right > Select either Staff Member or Staff Contracts
* This section is a “header” for all staff which will need to be updated when adding a new member of staff details, such as employment numbers, etc.
* Under Staff Contracts, shows a list of all staff contracts and by clicking on the staff name takes you into “Settings”; where changes such as start date and end ‘Leave’ dates can be entered. By selecting “Salary” across the top; where salary grades, pension and auto increments can be applied. By selecting “Notes”; where further information can be entered.
* Pay scales and allowances applied in the contracts can be checked in this section but not changed at school level.

**Getting started on NON-STAFFING**

Pupil Numbers

* Click Non-Staffing > Slide mouse over to the right > Select Pupil Numbers
	+ Make sure the October 2024 Census data is used to enter the pupil numbers in each year group, starting with 2025-26 Section under the Census Oct 2024 column and then cascaded down into the Census Oct 2025 and Census Oct 2026 columns appropriately.
	+ Actual columns can be used to update future numbers in year, used only for information purposes. These numbers are not used for any calculation within the software.
	+ Nursery numbers entered under the EYFS row and are again for data information purposes only.
	+ Scroll down to ‘Totals’, these must match with the Indicative Budget Statement pupil unit numbers for Primary/Secondary Sector.

Funding Predicator:

* Click Non-Staffing > Slide mouse over to the right > Select Funding Predicator
	+ The 2025-26 Indicative Budget Statement figures need to be updated here using the unit numbers as shown on the Budget Statements. These should also include: Rates, Education Function top slicing under Delegation Deductions, MFG figure (if a school has been allocated this under “MFG Adjustment”) which should be applied to 2025-26, one year only.
	+ Other DSG Funding streams at the bottom half of the Budget Statement should be added in the next Section.

Budget Entries:

* Click Non-Staffing > Slide mouse over to the right > Select Budget Entries
* Here, clicking into the ‘Header’ of columns – Ledger (this puts the Ledger Codes in order and helps to see all income Ledger Codes at the bottom half of the list) or Cost Centre (in some sort of CC order) sorts these into number order.
	+ Here, schools need to check and enter all the other streams of 2025-26 Funding that have been identified to be paid to schools. Both via the Cash Advance in April/May as well as school generated income. Whilst the High Needs Top up – SEN is paid via the ContrOCC system, this will need to be added as a separate line, to be added as a direct Budget into FMS too.
	+ Please note some of this funding streams are to be treated as ‘Expected Funds’ and hence should be entered as such, i.e., against an Expected Funds Cost Centre.
	+ Examples of these are;
		- GLA FSM Apr -Aug
		- GLA FSM Sep – Mar
		- National Insurance Contribution Grant

Cost Centre Descriptions:

* Click Overview > Slide mouse over to the right > Select Coding Index. This takes you into Ledger Codes first. Across the top heading, select ‘Cost Centres’ > Select the Cost Centre Number required > Click and add ‘Alt Description’ that your school uses against that Cost Centre.

If you have any questions or wish to discuss any of the systems further, please contact the support desk from the details below:

Email Address: sbsonline@schoolbusinessservices.co.uk

Telephone number: 0345 222 1551 Option 8

Alternatively, please contact your Link Officer

Schools Finance Team

March 2025