Syracuse City

SCSD

School District

FINANCIAL SERVICES GUIDE

Table of Contents

When you have questions – We are here to help!

PeopleSoft Questions and Training Requests…………………………Eric Vogelsang or Chris Komar ext. 5013

Purchasing Procedures……………………...Division of Purchase 435-3458

Budget Questions by Functional Area:

    Teaching and Learning .... Tyler Hall ext. 4434

    Schools.. Lauryn LaBorde ext. 4463

    Board of Education and Fiscal Services ....Chris Bianchi ext. 4981

    Health Services and Human Resources .... Amanda Grode ext. 5950

    Food Service, School Security, Office of Shared Accountability, Office of the Superintendent,

    Transportation, and Facilities and Operations ....Lisa Doerle ext. 4160

BUDGET

PeopleSoft Financials Access

PeopleSoft ™ is a financial software application used by the Syracuse City School District. Access can be obtained by completing a PeopleSoft Access Center ticket. The url is http://ne .

Below is an image of the types of roles that are available.

For budget inquiries, you will want to request Fin Sc Inquiry.

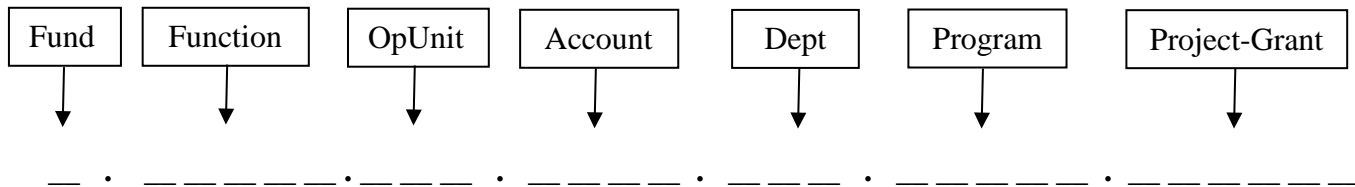| Hover your mouse over a checkbox for privilege description			
☐ Requisition Approver	☐ Requisition Requester	☐ Special Requester	☐ SCSD User
☐ Fin Sc Inquiry	☐ Claims Auditor	☐ Accounts Payable	☐ Paycycle
☐ 1099 Maintenance	☐ Accounts Payable Supervisor	☐ Accounting	☐ Accounting Supervisor
☐ Inventory Accounting Mgr	☐ Batch Jobs	☐ Budget	☐ Budget F
☐ Special Programs	☐ Business Operations	☐ Budget Supervisor	☐ AM Accounting Users
☐ AM Batch User	☐ AM IT Warehouse Users	☐ AM Warehouse Users	☐ AM Warehouse Manager
☐ Billing Clerk	☐ Permit Processor	☐ AR Maintenance	☐ Payment Entry
☐ Payment Processor	☐ AR Collector	☐ AR Supervisor	☐ Billing Supervisor
☐ AR BI Batch Processing	☐ Purchasing Special Requests	☐ Vendor Maintenance	☐ Buyer
☐ Po Approver	☐ Purchasing Supervisor	☐ Fulfillment Clerk	☐ RMA Clerk
☐ RTV Clerk	☐ Warehouse Clerk	☐ Stock Inquiry	☐ Item Entry Clerk
☐ Receiver	☐ Receiving Log Clerk	☐ Replenishment Clerk	☐ Item Maintenance
☐ Replenishment Manager	☐ Item Approver	☐ Fulfillment Manager	☐ RMA Manager
☐ RTV Manager	☐ Warehouse Manager		

Budget Numbers

The budget number provides the framework used to budget, record, and report all the District's financial transactions and balances. The budget number is comprised of seven individual elements: Fund, Function, Operating Unit, Account, Department, Program and Project-Grant. The general purpose of each of these elements is as follows:
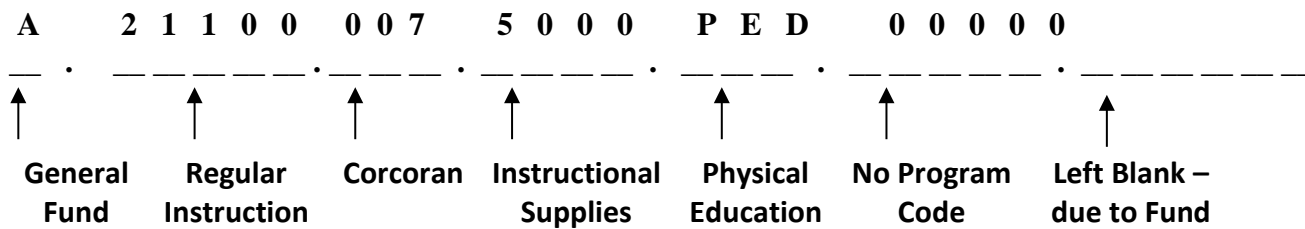
- Fund – The Fund identifies the overall funding source. The funds most commonly used by school personnel are A (General Fund) and F (Special Programs Fund). C (Cafeteria Fund) and H/H2 (Capital Projects Fund/JSCB) are used by specific operations.

- Function – The Function identifies groups of related activities aimed at accomplishing a major service or purpose. Function codes are grouped as follows:
  - 10000 – 19999   General Support
  - 20000 – 29999   Instruction
  - 50000 – 59999   Transportation
  - 60000 – 89999   Community Service
  - 90000 – 99999   Undistributed

- Operating Unit – The Operating Unit identifies the school or administrative division. For example, an operating unit of 007 indicates that the school is Corcoran.

- Account – The Account identifies transaction types. Account codes are grouped as follows:
  - 1000 – 1999   Personnel Services
  - 2000 – 2999   Equipment and Capital Outlay
  - 3000 – 3999   Revenue
  - 4000 – 4999   Contract Services
  - 5000 – 5999   Supplies and Materials
  - 6000 – 7999   Debt Service
  - 8000 – 8999   Employee Benefits
  - 9000 – 9999   Interfund Transfer

- Department – The Department classifies the activity performed within a school or administrative division. For example, department PED indicates that the activity is classified under the category of Physical Education.

- Program – The Program identifies a specific activity that may cross functions, operating units and/or departments. For example, a program code of 00190 indicates that the activity is related to Leadership Academy.

- Project-Grant – Project-grants apply only to specific funds: F (Special Programs Fund), H (Capital Projects Fund) and H2 (JSCB). The project-grant in the F fund identifies the specific funding source such as Title I, Universal Pre K or Student Health Services grant. The project-grant in the H and H2 funds identifies the capital project such as Nottingham Roof Replacement or HW Smith Reconfiguration.
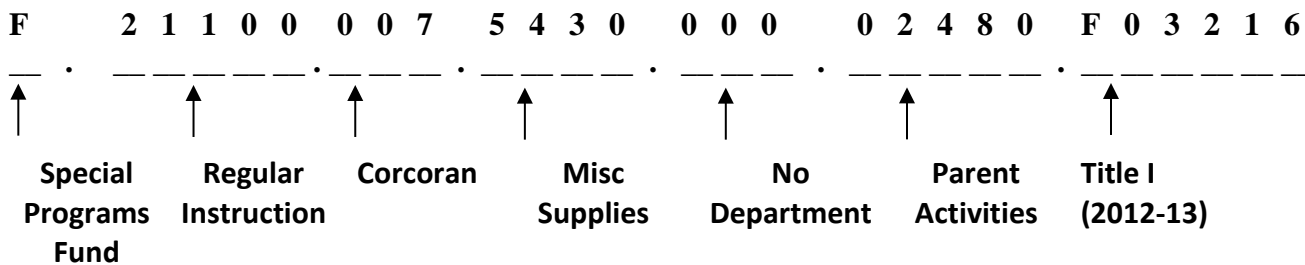
Budget Numbers

Budget Number

Fund	Function	OpUnit	Account	Dept	Program	Project-Grant

__ . __ __ __ __ __ . __ __ __ . __ __ __ __ . __ __ __ . __ __ __ __ __ . __ __ __ __ __ __

Example 1 – A Fund:

A   2 1 1 0 0   0 0 7   5 0 0 0   P E D   0 0 0 0 0

General Fund	Regular Instruction	Corcoran	Instructional Supplies	Physical Education	No Program Code	Left Blank – due to Fund

Example 2 – F Fund:

F   2 1 1 0 0   0 0 7   5 4 3 0   0 0 0   0 2 4 8 0   F 0 3 2 1 6

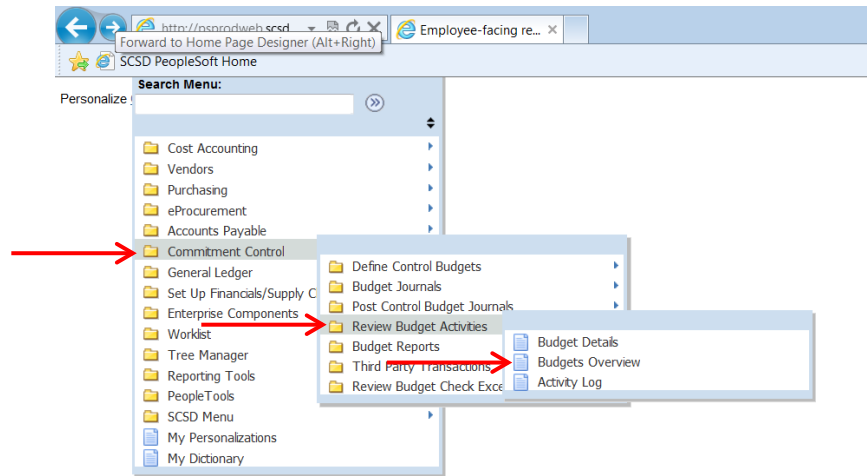| Special Programs Fund	Regular Instruction	Corcoran	Misc Supplies	No Department	Parent Activities	Title I (2012-13)

Looking Up Budget Information in PeopleSoft Financials

<u>Menu path: Commitment Control > Review Budget Activities > Budgets Overview</u>

If this is your first time going into Budgets Overview, click Add a New Value. Otherwise, click Find an Existing Value, Search and click on one in the drop down box.

Looking Up Budget Information in PeopleSoft Financials

Type in a name you would like to call your Inquiry. (ex. Budget) Then click Add.

The first item to complete is the Ledger Group. Click on the magnifying glass next to Ledger Group.

Looking Up Budget Information in PeopleSoft Financials

When looking up A FUND Budgets, you want to always choose A_TRACK. For all others, choose the control group (i.e. F_CONTROL for F FUND, or C_CONTROL for C FUND). Click on A_TRACK.

Looking Up Budget Information in PeopleSoft Financials

Fill out the Budget period. It is named after the second half of the fiscal year (i.e. 2013 for the 2012/2013 fiscal year; 2014 for the 2013/2014 fiscal year). Not applicable for F Funds.

Fill in the information in the proper boxes. % signs represent wildcards. (ex. If you want to see only accounts that begin with 5, enter "5%" or "5%%%")

Looking Up Budget Information in PeopleSoft Financials

ORACLE

Favorites | Main Menu> Commitment Control > Review Budget Activities > Budgets Overview

Inquiry Results

Business Unit:	SCSD1
Ledger Group:	A_TRACK A Fund Track
Type of Calendar:	Detail Budget Period
Amounts in Base Currency:	USD
Revenue Associated: ☐	

Return to Criteria   Max Rows: [100] Display Options   [Search]

Ledger Totals (18 Rows)

		Net Transfers:	
Budget:	237,641.33		1,265.33
Expense:	221,311.41		
Encumbrance:	0.00		
Pre-Encumbrance:	26.55		
Budget Balance:	16,303.37		
Associate Revenue:	0.00		
Available Budget:	16,303.37		

This is the available budget in Total.

This is the available budget by line item.

Budget Overview Results   Customize | Find | View All | 🖼 | ⊞   First ◄ 1-18 of 18 ► Last

		Ledger Group	Fund	Class	Oper Unit	Account	Dept	Program	Budget Period	Budget	Expense	Encumbrance	Pre-Encumbrance	Available Budget	Percent Available
1		A_TRACK	A	20200	001	1570	000	00000	2013	108,662.000	108,532.330	0.000	0.000	129.670	0.12
2		A_TRACK	A	20200	001	1800	000	00000	2013	49,352.000	37,860.490	0.000	0.000	11,491.510	23.28
3		A_TRACK	A	20200	001	1810	000	00000	2013	0.000	2,146.850	0.000	0.000	-2,146.850	0.00
4		A_TRACK	A	20200	001	1810	000	00790	2013	0.000	2,654.190	0.000	0.000	-2,654.190	0.00
5		A_TRACK	A	20200	001	5010	000	00000	2013	4,728.330	4,689.160	0.000	26.550	12.620	0.27
6		A_TRACK	A	20200	001	8010	000	00000	2013	8,678.000	7,541.200	0.000	0.000	1,136.800	13.10
7		A_TRACK	A	20200	001	8010	000	00790	2013	0.000	491.040	0.000	0.000	-491.040	0.00
8		A_TRACK	A	20200	001	8020	000	00000	2013	13,583.000	12,814.740	0.000	0.000	768.260	5.66
9		A_TRACK	A	20200	001	8030	000	00000	2013	9,784.000	8,817.670	0.000	0.000	966.330	9.88
10		A_TRACK	A	20200	001	8030	000	00790	2013	0.000	160.370	0.000	0.000	-160.370	0.00
11		A_TRACK	A	20200	001	8040	000	00000	2013	4,140.000	0.000	0.000	0.000	4,140.000	00.00
12		A_TRACK	A	20200	001	8050	000	00000	2013	32,958.000	29,802.140	0.000	0.000	3,155.860	9.58
13		A_TRACK	A	20200	001	8050	000	00790	2013	0.000	539.000	0.000	0.000	-539.000	0.00
14		A_TRACK	A	20200	001	8060	000	00000	2013	2,010.000	2,274.020	0.000	0.000	-264.020	-13.14
15		A_TRACK	A	20200	001	8060	000	00790	2013	0.000	38.500	0.000	0.000	-38.500	0.00
16		A_TRACK	A	20200	001	8090	000	00000	2013	2,292.000	2,062.210	0.000	0.000	229.790	10.03
17		A_TRACK	A	20200	001	8090	000	00790	2013	0.000	37.500	0.000	0.000	-37.500	0.00
18		A_TRACK	A	20200	001	8110	000	00000	2013	1,454.000	850.000	0.000	0.000	604.000	41.54

Return to Criteria   *Notes

Click on hyperlinks for detailed activity.

Budget: Original Budget (net of transfers)

Expense: Includes closed Purchase Orders and Inventory Orders, and actual salary and benefit expenses

Encumbrance: Open Purchase Orders

Pre-Encumbrance: Open Requisitions

Budget Transfers

The transfer of funds between budget lines is sometimes required during the school year. The following is the procedure for requesting a budget transfer and completing the budget transfer form. The updated electronic budget transfer form can be emailed upon request.

> Click Budget Transfer and Adjustment boxes

⬇

> Be sure to input ENTIRE budget number – Fund, Function, Operating Unit, Account, Department, Program and, if applicable, Project (Grant)

⬇

> The TOTAL that is increased must equal the TOTAL that is decreased. Check all budget lines being decreased for sufficient funds availability (see section 3 – Looking up budget information in PeopleSoft financials – Budget Overview).

⬇

> Please give a detailed explanation as to the reason for this transfer request. The format to use is Transfer funds from _____ to _____ for _____. For example, "Transfer funds from Equipment Repair to Computer Hardware for computer purchases".

⬇

Budget Transfers

The completed form must be signed by the person with budget authority over the budget number, and forwarded to Fiscal Services for approval and processing

Syracuse City School District
Fiscal Services Department: BUDGET TRANSFER REQUEST

Fund	Function	OpUnit	Account	Dept	Program	Function Description	Object Description	Increase	Decrease ( )
		Chart Field String							
A	20600	OSA	5010	TST	00000	Research, Planning & Evalu	Office Supplies & Equipment	7,475.00	-
A	26300	OSA	4790	TEC	00000	Computer Assisted Instructi	Maintenance Agreements	-	7,475.00
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
TOTAL								**7,475.00**	**7,475.00**

EXPLANATION:
Transfer funds from Maintenance Agreements (Technology) to Office Supplies & Equipment (Testing and Scoring) for printing of Scantron sheets

Preparer: _____ Signature _____ Printed Name   Dept: _____

Budget Approver: _____ Signature _____ Printed Name   Dept: _____

Fiscal Services Approval Use Only:

Approved: ☐   Disapproved: ☐   Delete: ☐   Date: _____

Signature: _____   Title: _____

Journal Entry Number: _____   Entered by: _____   Entry Date: _____

PURCHASING

Purchasing Information

The Syracuse City School District and the Onondaga County Division of Purchase have entered into an Inter Municipal Agreement consolidating purchasing services effective July 1, 2015. The agreement provided for the transfer of personnel, function and services from the School District to the Onondaga County Division of Purchase. Below you will find the new contact information. All inquiries should now be directed to the Onondaga County Division of Purchase.

Office Location and Mailing Address:	Ship to Address:
Onondaga County	SCSD Bova Supply Center
Division of Purchase	1023 Erie Blvd. West
John H. Mulroy Civic Center, 13th Floor	Syracuse, NY 13204
421 Montgomery Street	
Syracuse, NY 13202	
Purchasing Contact:	Bova Warehouse Contact:
Phone: (315) 435-3458	Phone: (315) 435-4422
Fax: (315) 435-3424	Fax: (315) 435-4002
SCSDPurchasing@ongov.net	
Web Site:	Hours:
http://www.syracusecityschools.com/districtpage.cfm?pageid=499	Monday – Friday
	7:00 a.m. – 5:00 p.m.
Hours:	**CLOSED ON S SCHOOL HOLIDAYS**
Monday – Friday	**CALL BERFORE DELIVERING ON**
8:30 a.m. – 4:30 p.m.	**ANNOUNCED SNOW DAYS**

November 15, 2016 was the deadline for entering all requisitions for instructional supplies, physical education supplies, and special education supplies.

May 31, 2017 is the deadline for entering requisitions for all other orders.

**Only emergency orders will be accepted after the purchasing cut-off deadlines. Emergencies will be evaluated and approved on a case by case basis. No orders are to be entered into PeopleSoft after the deadlines without prior approval from the Onondaga County Division of Purchase - 435-3458 or SCSDPurchasing@ongov.net.

Who Do I Contact with Purchasing Questions?		
For general purchasing questions, contact the Onondaga County Division of Purchase at SCSDPurchasing@ongov.net or 315-435-3458 Additional points of contact to include for specific inquiries are:		
Bidding (RFBs) procedures and status	SCSDPurchasing@ongov.net	315-435-3458
Supplier registration for bids	Register with Onondaga County Division of Purchase	
Request for Proposal (RFP) procedures and status	SCSDPurchasing@ongov.net	315-435-3458
Equipment repair orders	Deanne Dwyer	x5853
Travel requisition assistance	Deanne Dwyer	x5853
Driver delivery confirmations and schedules	John Daws	x4422
Packing materials (boxes, tape, etc.)	John Daws	x4422
Property Control / BOVA Transfers (assets for disposal/auction, move requests, pick-up requests)	John Daws	x4422
Requests for tables and/or chairs	John Daws	x4422

Onondaga County Division of Purchase - Purchasing Office Staff		
Valerie Gould Buyer III (315) 435-3209 ValerieGould@ongov.net	James Jackson Buyer II (315) 435-3415 JamesJackson@ongov.net	Cory Larrabee Buyer II (315) 435-5063 CoryLarrabee@ongov.net
Jodi Reith Buyer II (315) 435-3448 JodiReith@ongov.net	Tierza Sovocool Buyer II (315) 435-3475 TierzaSovocool@ongov.net	Brian Chairmonte Buyer I (315) 435-5064 Chairmonte@ongov.net
Beverley Chapman Buyer I (315) 435-3474 BeverleyChapman@ongov.net	Stephanie Cunningham Buyer I (315) 435-3471 StephanieCunningham@ongov.net	Elizabeth Florack Buyer I (315) 435-3466 ElizabethFlorack@ongov.net
Julie McCarthy Buyer I (315) 435-3470 JulieMcCarthy@ongov.net	Alycia Guy Clerk I (315) 435-3458 AlyciaGuy@ongov.net	Rene VanCleef Purchasing Clerk (315) 435-3504 ReneVanCleef@ongov.net
James Corbett Spec Writer I (315) 435-3472 JamesCorbett@ongov.net		
Herman Howard Director Contract Compliance (315) 435-8462 HermanHoward@ongov.net	Tajuana Cerutti Deputy Director Contract Compliance (315) 435-5065 TajuanaCerrutti@ongov.net	James Swan Warehouse Manager (315) 435-2249 JamesSwan@ongov.net

Bova Warehouse Staff		
Don Carr Purchasing Analyst (315) 435-4201 DCarr2@scsd.us	John Daws Central Stores & Mail Manager (315) 435-4422 JDaws@scsd.us	Deanne Dwyer Purchasing Clerk (315) 435-5853 DDwyer@scsd.us
Gerald Lavy, Jr. (Jerry) Stock Clerk (315) 435-5953 GLavyJr@scsd.us	Phuong Huynh Stock Attendant (315) 435-5952 PHuynh48@scsd.us	Brian Hammond Stock Attendant (315) 435-5955 BHammond@scsd.us
John Pawelek Stock Attendant (315) 435-5957 JPawelek@scds.us	John Walsh Stock Attendant (315) 435-5954 JWalsh@scsd.us	Vincent Zoll Stock Attendant (315) 435-5956 VZoll@scsd.us
Richard Cooper, Jr. Driver Messenger (315) 243-9849 RCooperJr@scsd.us	Mike Savage Driver Messenger (315) 251-5366 GSavage@scsd.us	Kyle Tape Driver Messenger (315) 247-9321 KTape@scsd.us
Adam Phillips Driver Messenger (315) 877-5616 APhillips@scsd.us		

Appropriate Use of Funds

INSTRUCTIONAL SUPPLIES
Special Education Supplies: Allocation for Special Education Teachers to purchase consumable items used for instruction of special education students. These funds should not be transferred to Regular Instructional Supplies.
Physical Education Supplies: For purchase of consumable items used for physical education instruction of students.
Regular Instructional Supplies: For purchase of consumable items used for instruction of students.
Science Center Supplies: For purchase of supplies for animals in science center.
PBIS Supplies: For purchase of supplies to provide Positive Behavior Incentives. Please refer to Student Support Services for guidance on acceptable items.

LIBRARY SUPPLIES & MATERIALS
Library Books – State Aided: For purchase of library books such as encyclopedias, reference books, hardcover fiction or non-fiction books and non-print library resources.
Library Materials: For purchase of film or videos, library books such as encyclopedias, reference books, hardcover fiction or non-fiction books and non-print library resources. For purchase of, or subscription to, publications such as law books, newspapers, periodicals, and paperbacks.

INTERNATIONAL BACCALAUREATE (IB)
IBO Extension of Service: Salary paid to certified staff for extension of service or extra assignments relating to the IB Program.
IBO Postage: Cost incurred for mailing/parcel delivery relating to the IB Program.
IBO Contractual: For IB registration fee.
IBO Test Fees: For IB testing fees.
IBO Membership: For IB per capita registration fees.
IBO Instructional Supplies: For purchase of consumable items used for instruction of students in the IB Program.

NJROTC
Uniform Cleaning & Alterations: For alterations and annual cleaning for storage of cadet uniforms.
Orientation & Travel: For travel expenses of cadets and NJROTC Instructors incurred in support of the NJROTC program.
Unit Support & Maintenance Supplies: For purchase of consumable items used in direct support of the NJROTC program.

OCCUPATIONAL EDUCATION SUPPLIES
Computer Aided Instruction: For purchase of consumable items for computer aided instruction of students.
Foods: For purchase of Food Program supplies.
Automotive Programs: For purchase of consumable items for instruction of students in Automotive Program.
Cosmetology Supplies: For purchase of consumable items for instruction of students in Cosmetology Program.

OTHER
Office Supplies: Purchase of consumable items used for administration, office or other work.
Custodial Supplies: Supplies necessary for cleaning of District buildings such as cleaning products, garbage bags and waxes.
Interscholastic Athletics: For purchase uniforms or cloth orders for athletic teams.
PSAT/NMSQT Scoring: Fees paid to score standardized tests.
AP Test Fees: Fees for Advanced Placement tests.

Bid Thresholds

For goods over $20,000 or services over $35,000, work with the Purchasing Department and your Supervisor to complete any required bidding procedures, Request for Proposal (RFP) and/or contract execution. Please allow three to four months to complete the formal bidding process.

If the goods or services are over $1,500, Purchasing will obtain 3 quotes from different vendors and identify the vendor with the lowest total cost including shipping and installation if necessary. Please allow approximately two weeks for purchasing to obtain all quotes needed.

Further information can be found on the SCSD Purchasing web site.

TABLE OF PROCUREMENT THRESHOLDS
City of Syracuse Ordinance No. 141-2012, Amended Schedule A, Effective May 16, 2012

Determination of Procurement Method

Purchase Contracts (Commodities, Equipment or Goods)	No Quotes (1)	Minimum Number of Informal Quotes (2) (3)	Minimum Number of Formal Quotes (4) (5)	Formal Bid (6)
Up to $1,500	X			
$1,501 - $3,000		3		
$3,001 - $20,000			3	
Over $20,000				X

Public Works or Services (Construction and Service Contracts)	No Quotes (1)	Minimum Number of Informal Quotes (2) (3)	Minimum Number of Formal Quotes (4) (5)	Formal Bid (6)
Up to $1,500	X			
$1,501 - $3,000		3		
$3,001 - $20,000			3	
Over $20,000				X

(1) "Open Market" purchases at the discretion of the Purchasing Agent
(2) Documented telephone quotations from at least three vendors (if available)
(3) Requires RFQ and Informal Quotes documented, summarized and attached to Approved Requisition.
(4) Written/fax quotations from at least three vendors (if available)
(5)   Requires written RFQ and Formal Vendor Quotes attached to Approved Requisition.
(6) When a purchase is requisitioned, the cost must be estimated. When the cost is estimated in excess of the Formal Bid threshold, SCSD Department must submit to Purchasing a request to advertise for formal bidding along with tentative specifications. Each request will also be reviewed against prior records and anticipated usage to determine if purchases of a similar nature

will exceed the Formal Bid thresholds within a consecutive six-month period. If so, the SCSD Department must submit a request to advertise and tentative specifications for formal bidding.

Bid Thresholds

Procedures for the Award of Quotations

a) Quotes will be awarded to the lowest responsible and responsive vendor who meets the specifications.
b) Whenever an award is made to other than the lowest quote, this shall be indicated in writing and maintained in the requisition file.
c) When the specified number of quotations cannot or will not be secured, the reason for this shall be indicated in writing and maintained in the requisition file.

Exceptions to Bidding

a) Emergency Situations - An emergency exists if the delay caused by soliciting quotes would endanger the health, welfare or property of the municipality or the citizens.
b) Council Ordinance - Authorized by Common Council to waive competitive bidding requirements.
c) Sole Source - One possible source. A common Council ordinance to waive competitive bidding is required.
d) True Lease - Prices will be obtained thorough quotations whenever possible.
e) Preferred Sources - NYS Department of Corrections, NYS Ind. for the Blind and NYS Ind for the Disabled, NYS Office of Mental Health
f) Professional Services - Services which require special education and training, license to practice or are creative in nature (examples: lawyers, doctors, accountants, engineers, artists, etc.). For procurement of professional services, see Ordinance 141-2012 and Schedule B

How to Look Up a Requisition

PURPOSE:

- You have entered a requisition in PeopleSoft and you want to review the requisition status to determine if the requisition has been approved or make changes to the requisition.
- You want to know what the related PO number is, if goods/services have been received or if the vendor has been paid.
- You want to review a similar requisition to help you enter a new requisition.

PROCEDURE:

1. **Navigate to:** eProcurement > Manage Requisitions
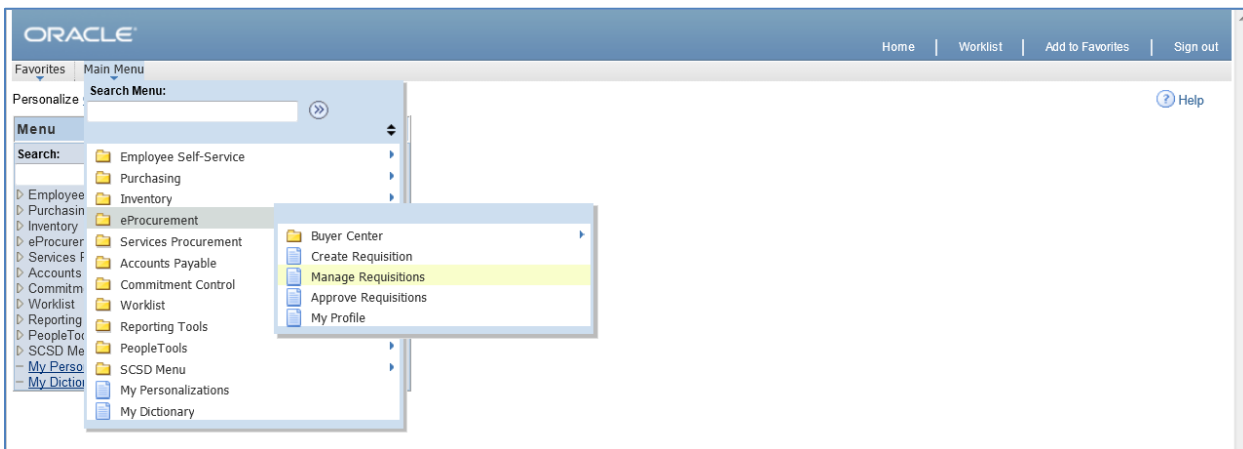
2. **Enter the information you know to locate the requisition – examples include:**

Search by "*Requisition ID*"#

- If you know the "*Requisition ID*", enter the 10 digit number in the "*Requisition ID*" field.
- Delete the "*Date From*" field to allow a larger range for the search.
- Delete the "*Requester*" field and click search.

TIP: The "*Request Status*" field defaults to "*All but Complete*", if the requisition is not found when you search, try changing the "*Request Status*" to "*Complete*".

How to Look Up a Requisition

Search by yourself as "*Requester*"
- If you are looking for an order for which you are the "*Requester*", delete the "*Date From*" field and click search at this time.
- This will list the most current orders, up to 50, for this "*Requester*".

  TIP: To list more orders, change the date range fields to search a time period prior to the last order listed.

Search by someone else as "*Requester*"
- If you are not the "*Requester*" for the order you are looking for, delete the "*Date From*" field and your name from the "*Requester*" field.
- Click on the magnifying glass next to the field and find the name of the person who is the "*Requester*", click the user ID in the requester column.
- Select search for the most current list of orders for that "*Requester*".

Search by "*Entered By*"
- If you are the person that entered the order or you know the name of the person that entered the order, you can search for the order by the "*Entered By*" field.
- Delete the "*Date From*" field and the "*Requester*" field.
- Click on the magnifying glass next to the "*Entered By*" field. Select the desired user ID in the entered by column, then select search.
- This will list up to 50 of the most current orders entered by this person.

Search by "*PO ID*"
- If you know the purchase order number and want to view information from the original requisition you can search by "*PO ID*".
- Delete the "*Date From*" field and the "*Requester*" field.
- Enter the 10 digit purchase order number in the "*PO ID*" field, then select search.
- This will list all requisitions associated with this PO.

How to Look Up a Requisition

Search by "*Requisition Name*"
- When the preceding methods of searches do not provide the results you needed, you can try searching by entering information that may be in the "*Requisition Name*" field.
- The standard for naming the requisition is the 3 digit location code of where the item(s) are to be delivered, the last name and sometimes first initial of person that the order is for, and the name of the suggested vendor for the order.
- The most useful key word is usually the teacher's last name.
- Be sure to delete anything in the "*Requisition*", "*Date From*", "*Requester*", "*Entered By*", and "*PO ID*" fields.
- Enter the last name of the person the order is for and select search. This will list all orders with that name in the "*Requisition Name*" field.
- Scroll down the list to find the requisition you are looking for.
- If you do not find the requisition you were looking for, try a different date range.

TIP: Due to security restrictions, some users can only look up requisitions where they are the "*Requester*" or "*Entered By*". If you need assistance, please call the Purchasing Department.

3. Review the requisition information

- Click on the twisty next to the requisition number you would like to review to display the different types of information available.

- Click on the specific type of information you would like to review (i.e. "Requisition", "Approvals", "Receiving", "Payment", etc.)
- **TIP:** Click on the Select Action drop down menu to cancel or copy the requisition

How to Look Up a Purchase Order

PURPOSE:

- You have entered a requisition in PeopleSoft and you want to review the purchase order status to determine if the purchase order has been approved.
- You want to review the prior year's purchase order to help you enter a new requisition.

PROCEDURE:

1. **Navigate to:**   Purchasing > Purchase Order > Review PO Information > Purchase Order
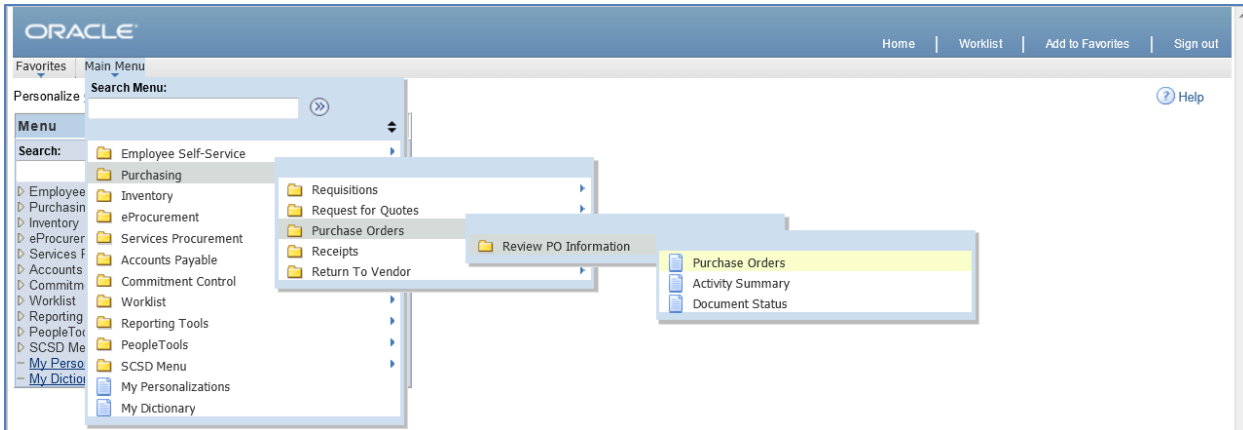
2. **Enter the information you know to locate the purchase order – examples include:**

- If you know the Purchase Order number, enter the 10 digit number in the "*PO ID*" field.
- Enter or search for and select the vendor name.
- Hit Enter or Click [Search]

How to Look Up a Purchase Order

3. Click on the Purchase Order you would like to review from the search result listing

4. Review the Purchase Order information such as:

- Vendor name and Vendor ID
- Item Description, Category code, PO quantity, unit of measure and amount

- Click on the Line Comments icon 🗩 on the right side to view the information that was entered in the "Additional Information" section during requisition entry. Click [OK] to return to the previous screen.
- In this example, the state contract number (PC62993), fund (A) and the quote number (Quote 2018329589) were entered.

How to Look Up a Purchase Order

- Click on the Schedule icon ![icon] on the right side to view the line details.

- Then click on the Distribution/Chartfield icon ![icon] on the far right side to view the chartfield string for the line.

- In this example, the chartfield string is:

- Click ![Return] to go back to the previous screen.

- Click Return to Main Page on the top right to return to the original Purchase Order inquiry screen.

How to Approve a Requisition

In PeopleSoft, the budget authority will approve requisitions that will affect their budget lines. Approval is needed prior to the request becoming a purchase order.

Procedure
Once you have signed in to PeopleSoft, navigate to Main Menu > eProcurement > Approve Requisitions
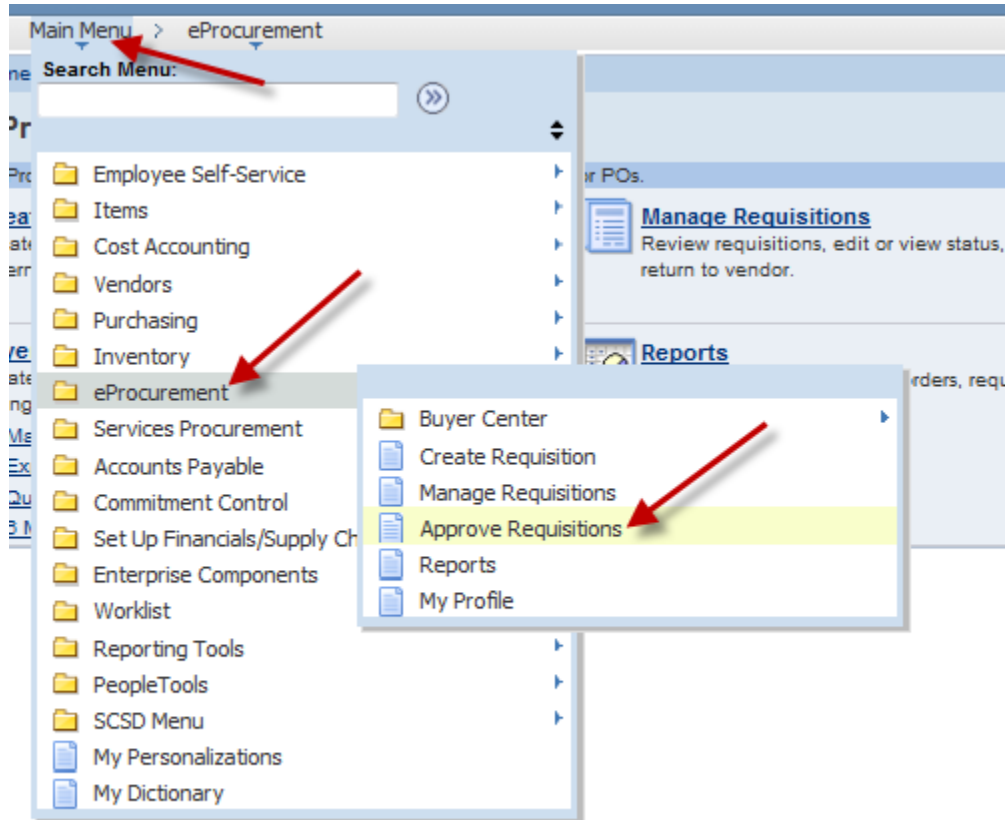
How to Approve a Requisition

Click on search and the screen will show all the requisitions awaiting your action. You can select a requisition to review for approval.

Click on Search

Manage Req... ...ls

Search Requisitio...
To locate requisitions t...r requisitions that previously required your approval), edit the criteria below and click the Search button.

Requisition ID:		Requisition Name:	
Business Unit:		*Status:	Pending
Date From:	08/12/2014	Date To:	08/12/2015
Requester:		Entered by:	

Search | **Clear** | Show Advanced Search

Requisitions
To view the complete details and approve a Requisition, click the requisition ID link.

Expand All | Collapse All

	Action/Status	Req ID	Requisition Name	Bus. Unit	Date	Requester	Entered By	Total	
	Pending	0000044873	FMO CITY ELECTRIC	SCSD1	07/01/2015				USD
	Pending	0000045017	...TECOGEN	SCSD1	07/02/2015				USD
	Pending	0000045033	CA RE						USD

Choose a requisition from the list.

Requisition Approval

Business Unit:	SCSD1
Requisition ID:	0000044873
Requisition Name:	
Requester:	
Entered on:	07/01/2015
Status:	Pending	**Total Amount:**	35,000.00 USD
Priority:	Medium
Budget Status:	Valid
Requester's Justification:	
No justification entered by requester.	

Edit Requisition

To view budget information please click on Select All and then click on View Line Details

Line Information

		Line	Item Description	Vendor Name	Quantity	UOM	Price		Requester's Comments
		1...16 BLANKET PURCHASE OR...	CITY ELECTRIC		$		1.00000 USD		

Customize | Find | First 1 of 1 Last

Select All / Deselect All

View Line Details

Review/Edit Approvers

Enter Approver Comments

Approve | **Deny**

If you have Comments you would type them here. (*You cannot deny a Requisition without comments*)

Return to Approve Requisitions

Choose Approve or Deny to complete the process.

The requester of the requisition will receive a notification of your approval or denial.

How to Approve a Requisition

The requester of the requisition will receive a notification of your approval or denial.

Requisition Approval

Confirmation

✔ FMO KPARK CITY ELECTRIC has been approved.

Review/Edit Approvers

Purch Clerk - EPLS Verified

▽ **FMO KPARK CITY ELECTRIC:Approved** 💬 View/Hide Comments

Purch Clerk - EPLS Verified

Approved

✔ Purchasing Clerk
07/02/15 - 2:22 PM

▷ **Comment History**

County Approval

▽ **FMO KPARK CITY ELECTRIC:Approved** 💬 View/Hide Comments

County Approval

Approved

✔ County routing on cat for req
08/12/15 - 9:30 AM

▷ **Comment History**

Return to Approve Requisitions   Previous in List   Next in List

Click on Return to Approve Requisitions to choose another requisition.

How to Approve a Purchase Order

In PeopleSoft, the budget authority will approve purchase orders that will affect their budget lines. Approval is needed prior to the purchase order being dispatched to the vendor.

Procedure
Once you have signed in to PeopleSoft, navigate to Main Menu > Purchasing > Purchase Orders > Approve POs
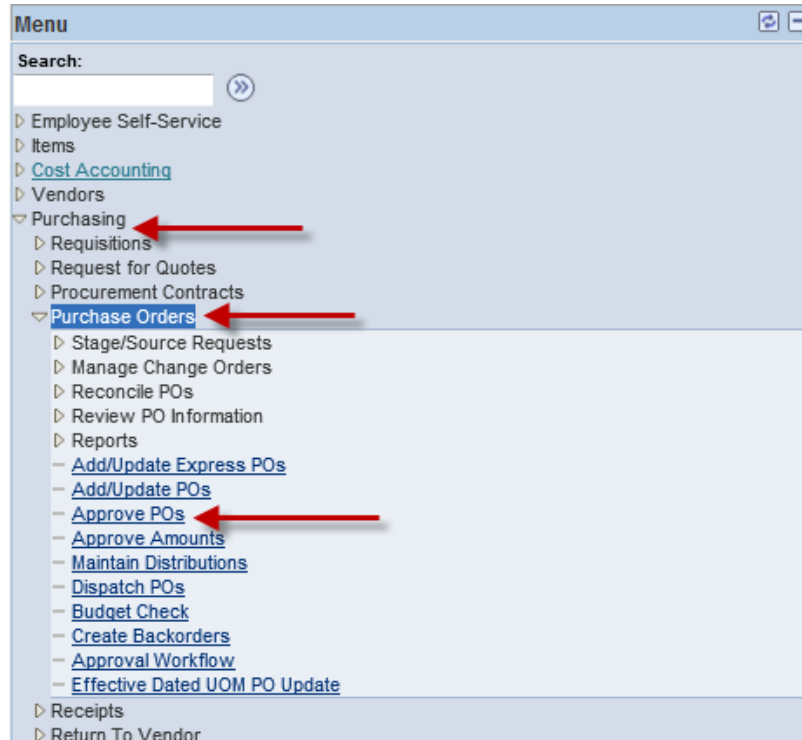
Click on search and the screen will show all the Purchase Orders awaiting your action. You can select a Purchase Order to review for approval.

How to Approve a Purchase Order

After reviewing the information you can either approve or deny the Purchase Order

To view budget information please click on Select All and then click on View Line Details

If you have Comments you would type them here. (*You cannot deny a Purchase Order without comments*)

Choose Approve or Deny to complete the process.

How to Approve a Purchase Order

You can then review the next layers of approval in the process

Click on Return to Approve POs to choose another requisition.

How to Delegate Requisition Approval Authority

In PeopleSoft, as a budget owner, you have the ability to delegate the approval authority for requisitions assigned to your budget when you are not able to approve requests due to time away from the office. You can delegate the approval authority for a specific date range. The assigned delegate (typically this individual would be your designated backup) will receive all the requests entered against your budget from that point on in their worklist.

Procedure

Once you have signed in to PeopleSoft:

How to Delegate Requisition Approval Authority

Click on
My Profile

In the Alternate User ID field enter the UserID of your designated Backup. You would then enter the effective dates to and from.

Then Click on Save
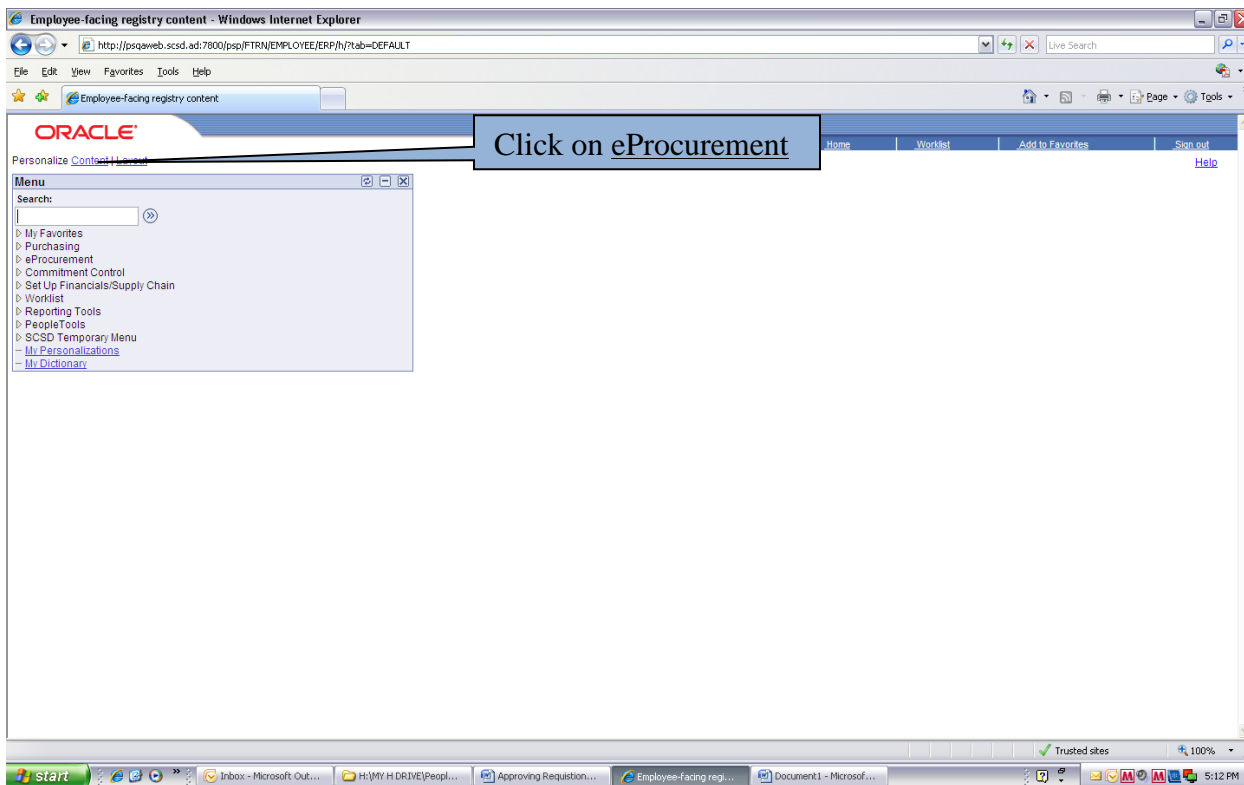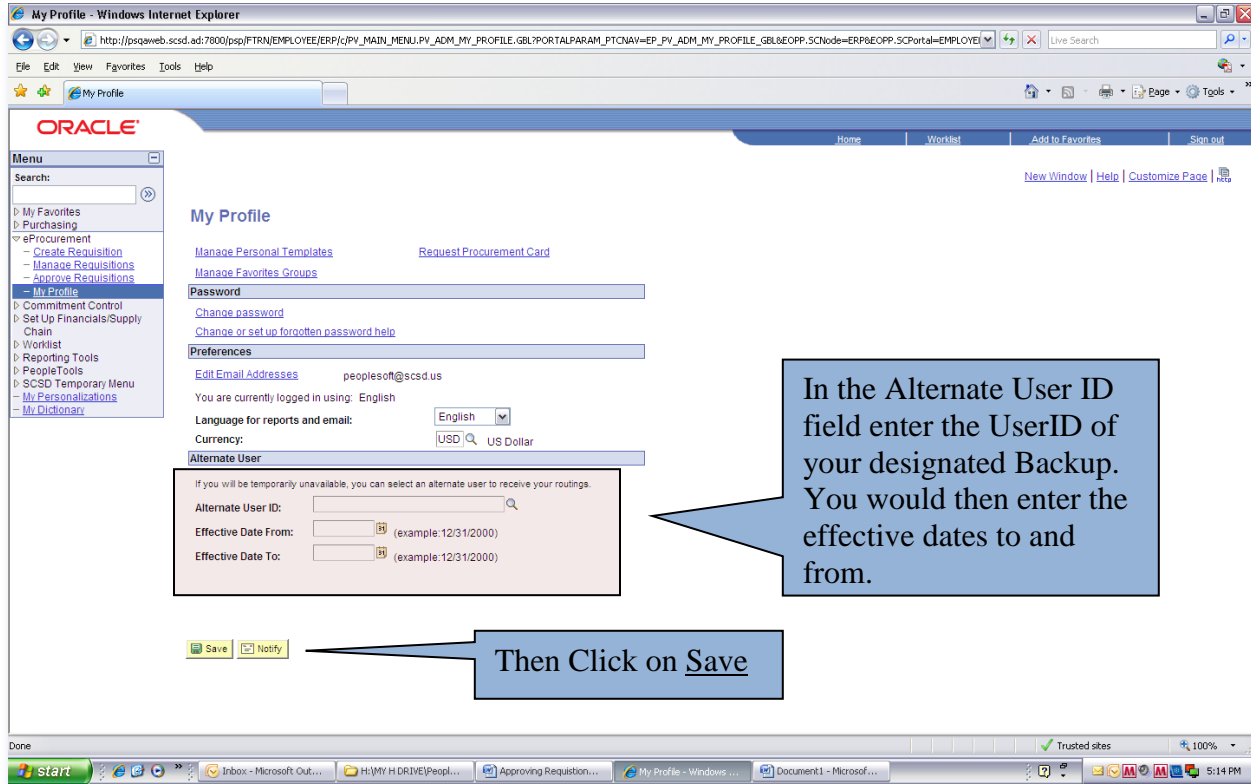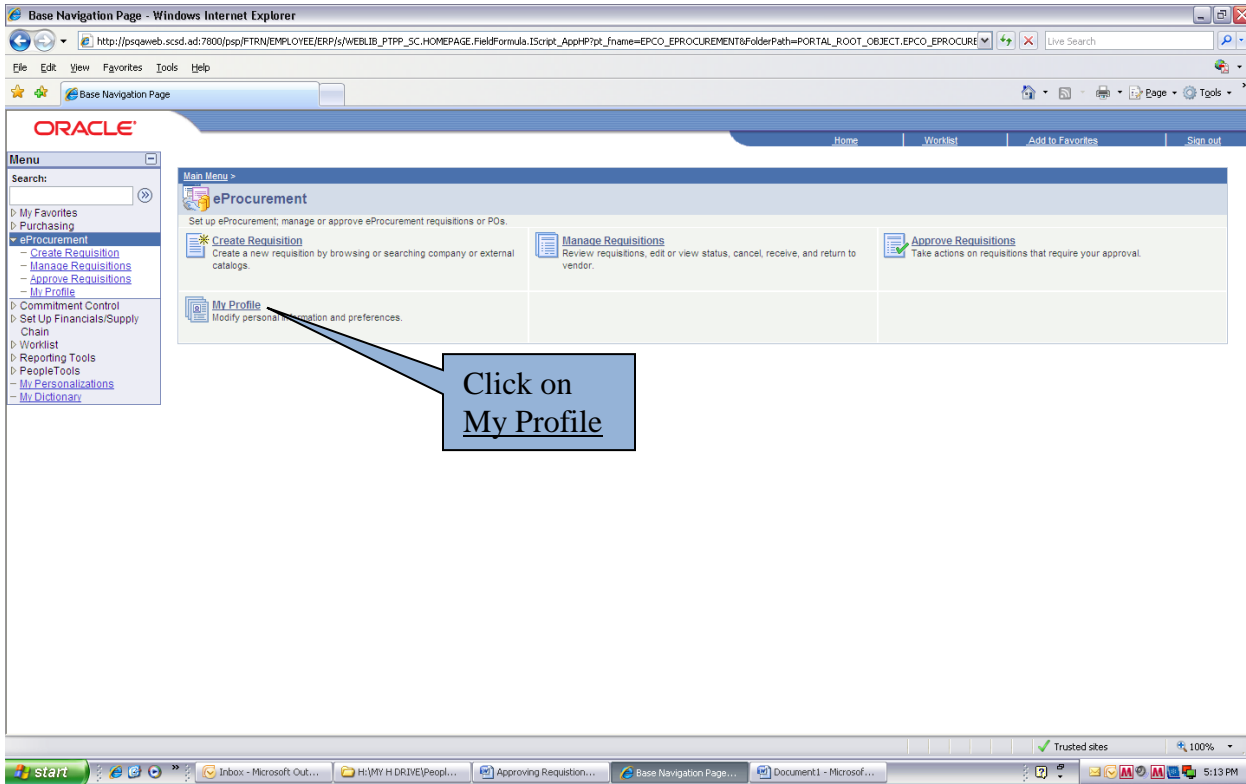
Extraclassroom Activities (ECA)

The Syracuse City School District, Booster/PTA groups, and Extraclassroom Activities (ECA) funds all serve different purposes for supporting the district's students. Examples are the following:

District	ECA	Booster/PTA
Pays for coaches, uniforms, equipment and transportation for basketball team	Students host a charity basketball fundraiser to collect money to donate to a homeless shelter	Parents fundraise to pay for the basketball team's party at the end of the season

Guidance from NYSED regarding ECA policies may be found on their website at:
http://www.p12.nysed.gov/mgtserv/accounting/docs/ExtraclassroomActivitiesJanuary2015.pdf

Please note that ECAs, Booster Clubs, and PTA/PTOs cannot use the District's tax identification number for purchases or to open bank accounts

Wegmans Card Requisitions

Wegmans cards offer the opportunity to purchase food and food related items for students and staff using beverage commissions and grant funds.

The staff member identified on the purchase requisition will be contacted when the card is ready to be picked up. Wegmans Shoppers Club cards can be picked up from Pat Hellinger, Accounts Receivable at Central Office ext. 4840.

The Shoppers Club cards should only be used for food items and products relating to food. If you are unsure if an item is allowed, please contact Bess Lyon at ext. 4832 or Pat Hellinger at ext. 4840.

Allowable Purchases:	Non-Allowable Purchases
- Food - Non-alcoholic beverages - Snacks - Plates - Bowls - Cups - Cutlery - Napkins	- Flowers - Balloons - Gift cards - Plants - Wrapping paper - Note cards - School supplies - Alcoholic beverages - Tobacco products
** A person who purchases non-allowable item(s) is required to reimburse the District for the cost of the non-allowable item(s) immediately upon notification of disallowance **	

Frequently Asked Questions

What do I do with my receipt?
Complete the Wegmans Receipt Submission Form including:
- Signature
- Reason for purchase (i.e. 10th grade celebration, staff meeting, etc.)
- Date of purchase
- Date of event
- Purchase Order Number

Submit the original receipt and form within 48 hours to the Accounts Payable department.

How do I check the balance on my Wegmans card?
To check the balance on your card or report a lost or stolen card: Call 1-800-934-6267
Choose option 3.

What do I do if I forgot the PIN for my Wegmans card?
If you forget or lose the PIN for your card, contact Pat Hellinger at ext. 4840 or Bess Lyon at ext. 4832.

Who do I return my Wegmans card to when the balance is $0 or the program ends?
Cards should be returned to Pat Hellinger in the Accounting Department at Central Office.

Additional information can be found on the Wegmans Shoppers Card Information page of the SCSD Purchasing Web site at http://www.syracusecityschools.com/districtpage.cfm?pageid=707

Beverage Commissions

Schools receive notification of Beverage Commission revenue from the Accounting Department at Central Office. This report includes any expenses during the current year. The New York State Department of Education has directed that these commissions cannot be held in a trust & agency account, so the commissions are held in the 'A' fund (general fund).

Funds do not roll from school year to school year, so purchase requisitions must be entered in a timely manner. Requisitions must be entered by the Special Request requisition deadline set by Purchasing (February 26, 2016 for the 2015-2016 school year).

Reminder: Per Board Resolution 1107-78: Instructional buildings may use 100% of commissions solely for student incentives or 60% student initiatives, 40% staff development activities, geared to improve student achievement. Examples:

60% Student Incentives: Field trips, Awards, Leadership Training, Literacy incentives, Positive incentive refreshments (e.g., grocery store card)

40% Staff Incentives: Registration for workshops, Professional Books, Refreshments (e.g., grocery store card)

It is the school's responsibility to keep a running balance of your beverage commissions, as well as a running balance of items spent/added $ to your Wegmans cards. To inquire as to your balances to date on your Wegmans cards, please call Wegmans at 800-848-1555 x5 (Business Shopper's Card).

Any questions about Beverage Commissions should be directed to Galina Donescu at 315-435-4873 or GDonescu@scsd.us

Field Trip Pricing

Destinations	Field Trip-1/2 Day (up to 5 hrs)		Field Trip-Full Day (5+ hrs)	
	Round Trip	2 One-Ways	Round Trip	2 One-Ways
WITHIN SYRACUSE	$273	$276	$446	$276
ALBANY	$928	$1,586	$1,100	$1,586
ALEXANDRIA BAY	$672	$1,074	$841	$1,074
AUBURN	$386	$502	$558	$502
BALDWINSVILLE	$341	$411	$512	$411
BINGHAMTON	$642	$1,014	$812	$1,014
BREWERTON	$341	$411	$512	$411
BROCKPORT	$695	$1,119	$866	$1,119
BUFFALO	$973	$1,676	$1,143	$1,676
CAMDEN	$590	$908	$759	$908
CAMILLUS	$311	$351	$482	$351
CANANDAIGUA	$642	$1,014	$812	$1,014
CANASTOTA	$386	$502	$558	$502
CANTON	$868	$1,465	$1,038	$1,465
CARTHAGE	$590	$908	$759	$908
CATO	$388	$502	$558	$502
CATSKILL	$1,064	$1,857	$1,233	$1,857
CAYUGA	$590	$908	$759	$908
CAZENOVIA	$386	$502	$558	$502
CENTRAL SQUARE	$386	$502	$558	$502
CHEEKTOWAGA	$853	$1,435	$1,023	$1,435
CHENANGO FALLS	$657	$1,044	$828	$1,044
CHITTENANGO	$341	$411	$512	$411
CICERO	$341	$411	$512	$411
CLAY	$341	$411	$512	$411
CLINTON	$590	$908	$759	$908
COBLESKILL	$718	$1,164	$777	$1,164
COLONIE	$853	$1,435	$1,023	$1,435
COOPERSTOWN	$672	$1,074	$841	$1,074
CORNING	$672	$1,074	$841	$1,074
CORTLAND	$590	$908	$759	$908
DEWITT	$296	$321	$467	$321
DOLGEVILLE	$642	$1,014	$812	$1,014
EAST HAMPTON	$2,050	$3,829	$2,217	$3,829
ELBRIDGE	$341	$411	$512	$411
ELMIRA	$672	$1,074	$841	$1,074
ESM	$273	$276	$446	$276
FABIUS	$386	$502	$558	$502
FAYETTEVILLE	$311	$351	$482	$351
FISHKILL	$1,244	$2,218	$1,414	$2,218
FREEVILLE	$590	$908	$759	$908
FULTON	$371	$472	$543	$472
GENESEO	$778	$1,285	$949	$1,285
GENEVA	$642	$1,014	$812	$1,014
GLENS FALLS	$1,064	$1,857	$1,233	$1,857
GOVENEUR	$672	$1,074	$841	$1,074
HAMILTON	$590	$908	$759	$908
HANNIBAL	$657	$908	$759	$908
HENRIETTA	$657	$1,044	$828	$1,044
HERKIMER	$642	$1,014	$812	$1,014

Destinations	Field Trip-1/2 Day (up to 5 hrs)		Field Trip-Full Day (5+ hrs)	
	Round Trip	2 One-Ways	Round Trip	2 One-Ways
HOMER	$590	$908	$759	$908
HORSEHEADS	$673	$1,074	$841	$1,074
ILION	$642	$1,014	$812	$1,014
ITHACA	$642	$1,014	$812	$1,014
JAMESTOWN	$1,244	$2,218	$1,414	$2,218
JAMESVILLE	$296	$321	$467	$321
JOHNSTOWN	$672	$1,074	$841	$1,074
JORDAN	$341	$411	$512	$411
KIRKVILLE	$341	$411	$512	$411
LAFAYETTE	$312	$353	$482	$353
LAKE GEORGE	$1,064	$1,857	$1,233	$1,857
LAKE PLACID	$1,154	$2,037	$1,324	$2,037
LANCASTER	$853	$1,435	$1,023	$1,435
LITTLE FALLS	$642	$1,014	$812	$1,014
LIVERPOOL	$296	$321	$467	$321
LOCKPORT	$1,064	$1,857	$1,233	$1,857
LOWVILLE	$672	$1,074	$841	$1,074
MANLIUS	$341	$411	$512	$411
MARCELLUS	$341	$411	$512	$411
MARTVILLE	$567	$863	$738	$863
MATTYDALE	$296	$321	$467	$321
MEDINA	$853	$1,435	$1,023	$1,435
MEMPHIS	$341	$411	$512	$411
MEXICO	$567	$863	$738	$863
MORAVIA	$567	$863	$738	$863
MORRISVILLE	$567	$863	$738	$863
MT. MARKHAM	$642	$1,014	$812	$1,014
MT. VERNON	$1,378	$2,489	$1,549	$2,489
MUNNSVILLE	$672	$1,074	$841	$1,074
NEDROW	$296	$321	$467	$321
NEW HARTFORD	$589	$908	$759	$908
NEW YORK CITY	$1,448	$2,624	$1,615	$2,624
NEWARK	$642	$1,014	$812	$1,014
NIAGARA FALLS	$1,064	$1,857	$1,233	$1,857
NORTH SYRACUSE	$312	$351	$482	$351
NORWICH	$642	$1,014	$812	$1,014
OGDENSBURG	$853	$1,435	$1,023	$1,435
OLD FORGE	$672	$1,074	$841	$1,074
ONEIDA	$590	$908	$759	$908
ONEONTA	$657	$1,044	$828	$1,044
OSWEGO	$590	$908	$759	$908
OWEGO	$642	$1,014	$812	$1,014
PENN YAN	$642	$1,014	$812	$1,014
PHOENIX	$341	$411	$512	$411
PLATTSBURGH	$1,259	$2,248	$1,429	$2,248
POMPEY	$341	$411	$512	$411
PORT BRYON	$386	$502	$558	$502
POTSDAM	$853	$1,435	$1,023	$1,435
POUGHKEEPSIE	$1,154	$2,037	$1,324	$2,037
PULASKI	$589	$908	$759	$908
RENNSELEAR	$853	$1,435	$1,023	$1,435
ROCHESTER	$657	$1,044	$828	$1,044
ROME	$590	$908	$759	$908

Destinations	Field Trip-1/2 Day (up to 5 hrs)		Field Trip-Full Day (5+ hrs)	
	Round Trip	2 One-Ways	Round Trip	2 One-Ways
SARANAC LAKE	$1,154	$3,037	$1,324	$3,037
SARATOGA SPRINGS	$853	$1,435	$1,023	$1,435
SCHENECTADY	$853	$1,435	$1,023	$1,435
SENECA FALLS	$642	$1,014	$812	$1,014
SKANEATELES	$386	$502	$558	$502
SODUS	$642	$1,014	$812	$1,014
SPECUALTOR	$672	$1,074	$841	$1,074
THENDORA	$672	$1,074	$841	$1,074
TONOWANDA	$883	$1,495	$1,053	$1,495
TROY	$883	$1,495	$1,053	$1,495
TULLY	$386	$502	$558	$502
UNION ENDICOT	$657	$1,044	$828	$1,044
UTICA	$597	$923	$768	$923
VERNON	$590	$908	$759	$908
VERNONA	$590	$908	$759	$908
VERONE	$590	$908	$759	$908
VESTAL	$657	$1,044	$828	$1,044
WAMPSVILLE	$386	$502	$558	$502
WANAKENA	$642	$1,014	$812	$1,014
WAPPENGER FALLS	$1,199	$2,128	$1,368	$2,128
WATERLOO	$590	$908	$759	$908
WATERTOWN	$642	$1,014	$812	$1,014
WEBSTER	$567	$1,044	$828	$1,044
WEEDSPORT	$386	$502	$558	$502
WEST GENESEE	$273	$276	$446	$276
WEST POINT	$1,244	$2,218	$1,414	$2,218
WHITE PLAINS	$1,290	$2,308	$1,458	$2,308
WHITESBORO	$590	$908	$759	$908
YONKERS	$1,290	$2,308	$1,458	$2,308

Cancellation Fee: $125 charge will be imposed if scheduled charter is cancelled within 2.0 hours of schedule pick-up time

Overnight Trips: Add $181 per night to cover room/meals for driver

One Way: Within Syracuse $133

Textbooks

If you have questions regarding textbook procurement, please contact the appropriate Department Coordinator:

Social Studies	x6358
English Language Arts	x6358
Math	x4303
Fine Arts	x4181
Science and Technology	x4269
Health and Athletics	x4181
Curriculum and Instruction	x4303

Textbook Barcoding

The Follett Barcode Readers are preloaded with the Follett Software Company Firmware to scan the Follett barcode labels. For first time use, you will have to calibrate the scanner to ensure that it is ready to read barcodes. The scanner must be connected to the USB port on your computer. To test the scanner you must use Notepad or Simple Text. Each scanner comes with a Getting Started pamphlet which can be used to test the scanner. For best results, scan all barcodes from a distance of 7-10 inches. If you find that the bar code scanner does not read the test barcode in the instructions, click on the help button.

Click on the Hardware icon.

Click on the Model 3800 Scanner.

Print these directions for your barcode scanner.

You will use this page to test your barcode scanner.

Textbook Barcoding

When the test barcode is scanned you should see the number come up in Notepad or Simple Text.
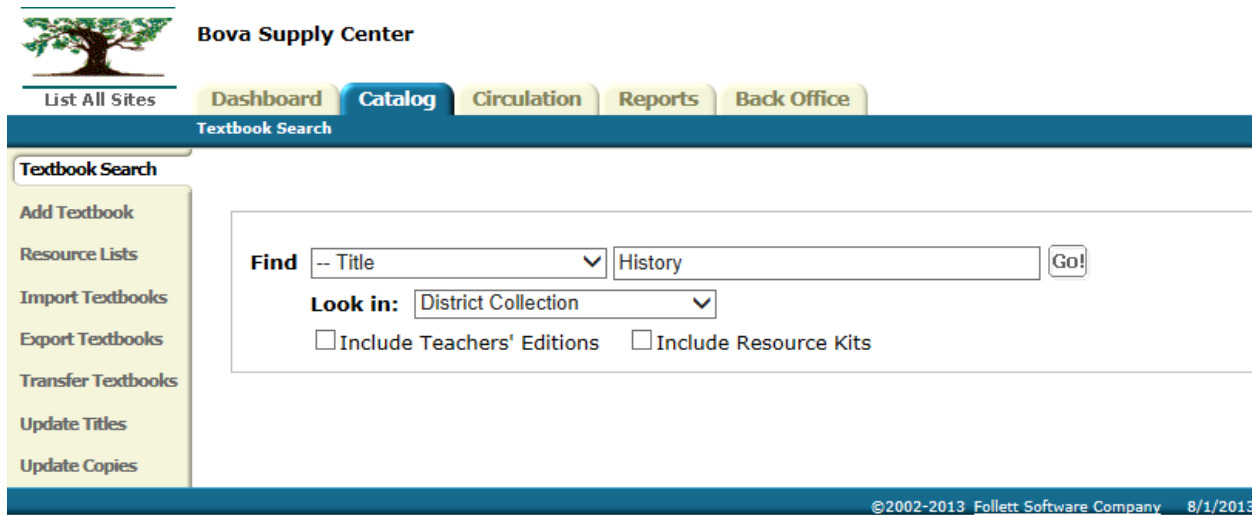
Receiving Books at BOVA-
All books received at the warehouse must be reviewed to determine if they should be barcoded, counted or just sent to the location. Once determined, you can look for a book, kit or any supplemental materials in Destiny by:

ISBN Number, Barcode #, Keyword-Publisher, Author, Vendor, Subject or Instructional Classification.

Books received at BOVA will be barcoded or counted and transferred at BOVA before being transferred to the school.

The Destiny system contains Follett T2 titles that can be edited for district use. To search in Destiny for a Book that has been barcoded at the BOVA Supply Center, go to Catalog>Textbook Search> Type in the Title or any part thereof>Go

This will bring up a list of all textbooks with the word History. The more information keyed in to Destiny, the more refined the search will be.

Textbook Barcoding

Click on the title:

The following screen will appear. From this screen the description can be edited to add more information:

Textbook Barcoding

Make sure that all of the information in the Title description is accurate.

Textbook Barcoding

Edit as necessary. Use you arrow back button to return to the previous screen. You can now add copies of the books.

You can enter copies by barcode, or copy count. Curriculum will determine which books are counted or barcoded. **As a general rule, all textbooks are barcoded and all supplemental or consumable items are counted unless otherwise directed by curriculum.**

Textbook Barcoding

Enter the number of copies you want to add. Scan the beginning Follett barcode label and click Save.

The barcode labels are positioned on the textbooks as follows:
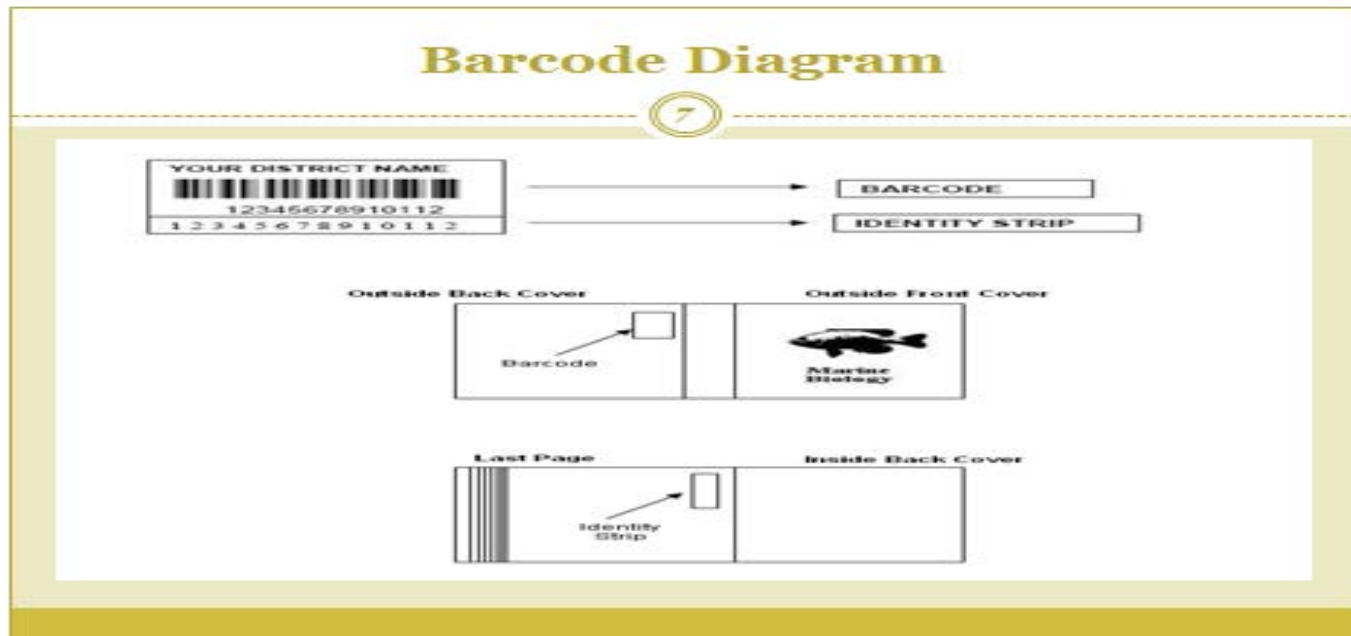
Once all barcode labels have been affixed to the appropriate places on the textbooks, the books can be transferred to the appropriate location.

Transfer materials from BOVA
Go to Catalog>Transfer textbooks> Upload

Select the location that the books will be transferred to from the dropdown menu. Click add and begin to scan the barcodes into Destiny. The system will keep a running count of barcodes scanned. Once all of the barcodes have been scanned for a location, Click transfer. Your job manager will appear. Click on View to review the job when completed.

The transfer is now pending on the school end.

Textbook Barcoding

Books Received at School Location

When you open Destiny, you will see that you have processing needed. Click on this button to see what transfers have been made to your school. The physical count of books received at the school will need to be confirmed.

Once the book count is verified, click on processing and click receive all. You do not have to scan barcodes in again. The books will now be part of your school inventory.

To Assign Books to Teachers

The Destiny System is linked to our ESchool schedule, as well as student information. Books can be assigned to a teacher, for classroom sets which do not go home with the students.

To check out textbooks to teacher, navigate to the **Circulation** tab, **Checkout Text** option, **To Teacher** subtab. Locate the teacher by entering or scanning the teacher's barcode in the **Find** box, then select the appropriate class from the **Class** drop-down list under the teacher's displayed name. Finally, enter or scan the barcodes of items being circulated in the **Find** box.

Check Out to Teacher

If your school distributes textbooks to students in a classroom, you can use this check-out method to check textbooks out to the teacher, where they can remain the teacher's responsibility or you can reassign them to students.

The district recommends scanning the barcodes to achieve maximum accuracy.

Textbook Barcoding

To Assign Books to Students
Patrons can be students or teachers. To assign books from a teacher to a student for maximum accountability:

Navigate to the **Circulation** tab, **Check Out Text** option. Ensure the **To Patron** subtab is selected.

Before checking out a textbook to a patron, you must first find the patron in the database by searching for the patron's name or by scanning the patron's barcode.

The most accurate method to check out items is to scan the patron's barcode and scan the textbook's barcode.

Next, scan the textbook barcode. If you scan the barcode, Destiny starts the search immediately (you don't have to click the **Find Copy** button as you would if you typed the barcode).

Destiny assigns due dates based on class and section information and the loan periods and policies you set up. You can change the due date, if necessary, by clicking the **Change** button when the textbook is in the Checked Out field.

If you check out a second item to the patron, the first item drops to the Items Out field. Both fields identify what is checked out to the patron.

You can print receipts for your patrons to provide a written record of the textbook due dates. You can choose to print a receipt for all textbooks checked out or just for the ones checked out that day.

Other materials are also included in the Destiny module that may appear as counts in your school. These items include kits, novels, supplemental materials or professional development materials.   If you are assigning these to teachers, the classes and the counts need to be transferred in the system as well following the same procedures as above.

Check-In a Textbook

To check in a textbook, navigate to the **Circulation** tab, **Check In Text** option.

The most accurate way to check in is to scan the barcode in the **Find Copy** field.

The Most Recently Checked In section lists checked-in items. Information here comprises the text name and barcode, due date, patron who checked out the item, and number of items the patron still has checked out.

PAYROLL AND PERSONNEL

Timecards

Timecards must be submitted for work done beyond normal working hours. Some instances where submission of a timecard would be required include Extension of Service and Overtime.

The timely submission of timecards is imperative because it enables the District to have as accurate a picture of spending and available budgets as possible.

All timecards must be submitted during the time period of when that work is taking place or the pay period immediately following. Timecards must be signed by both the employee and their supervisor, and must include hours worked as well as any vacation, personal, or sick time used.

Location Dashboard

Principals with access to the SCSD Location Dashboard can view a staff listing for all employees at their location

Navigate to: PeopleSoft HR – Main Menu – SCSD Customization – Location Dashboard

Example:
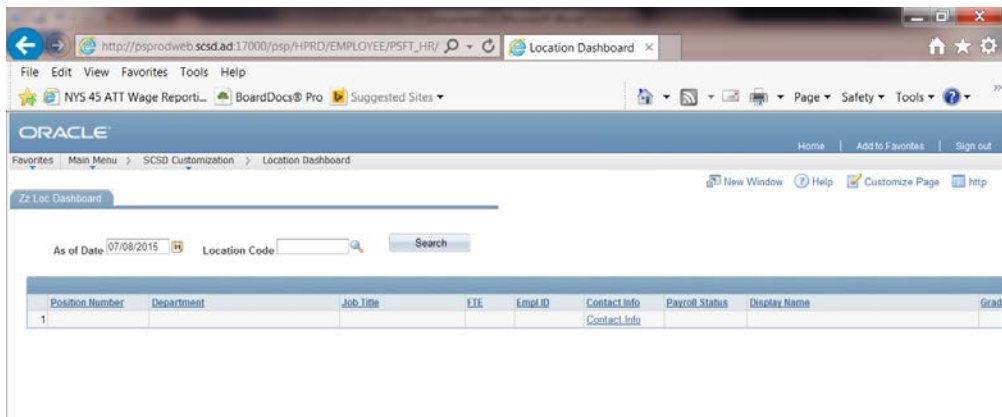
Select the Location Code for your building.

Example:
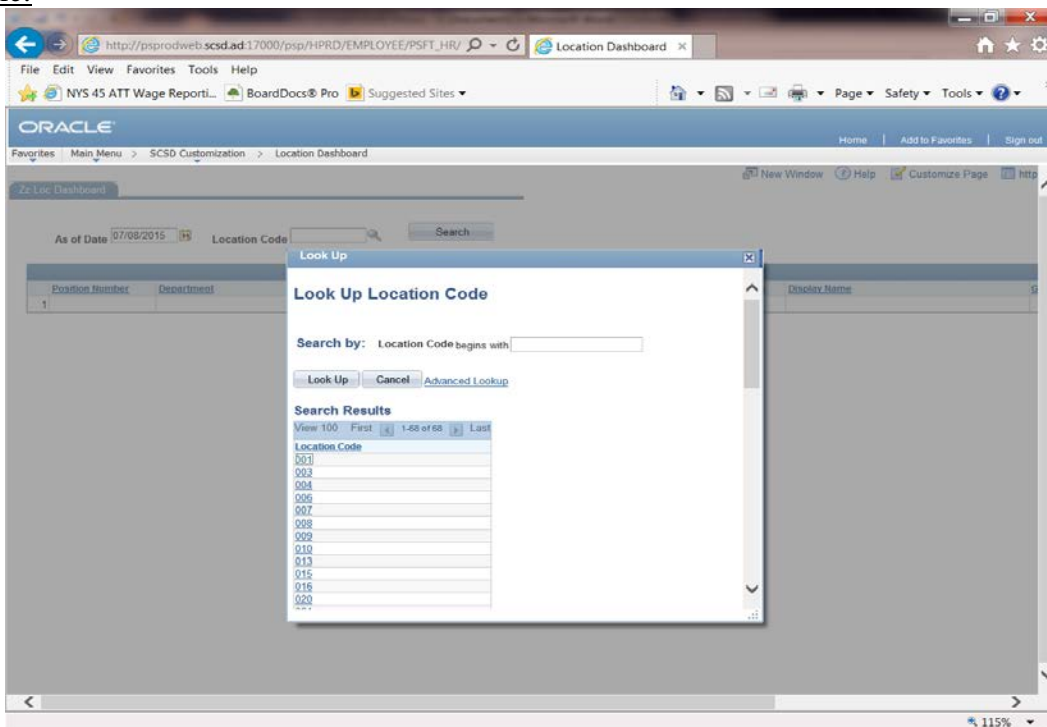
Location Dashboard

Click on Search

   o   A list of all of the employees at that location will appear

Example:

Periodically during the school year, Finance will request that the each school principal reviews the employees at their school to ensure that they are at the correct location. Schools should contact the Finance department if an employee not working at the school is on the list, or if a new employee is not included on the list.

In PeopleSoft, navigate to:

Menu Path: Workforce Administration > Personal Information > Modify a Person

Search for the employee by name or Employee ID

You can search by any of the fields here. Use the name field for the first name.

Click on search

Looking Up Staff Biographical Information

If your search returns more than one result then choose the employee from the list

Search Results

View All

First ◀ 1-4 of 4 ▶ Last

Empl ID	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name
19751	Barbara Rushlo	Barbara	Rushlo	(blank)	(blank)	J
30943	Barney Rubble	Barney	Rubble	(blank)	(blank)	J
26634	Benjamin Rudolph	Benjamin	Rudolph	(blank)	(blank)	D
30033	Brian Rushing	Brian	Rushing	(blank)	(blank)	C.

You will then be able to view their biographical Information

Favorites | Main Menu > Workforce Administration > Personal Information > Biographical > Modify a Person

Contact Information | Regional

Barney Rubble   Person ID: 30943

Current Addresses

Customize | Find | View All | 📊 | 📅   First ◀ 1 of 1 ▶ Last

Address Type	As Of Date	Status	Address	
Home	09/12/2012	A	123 Rocky Rd Stonequarry, OK 12312	View Address Detail

Phone Information

Customize | Find | View All | 📊 | 📅   First ◀ 1 of 1 ▶ Last

Phone Type	Telephone	Extension	Preferred
Home	315/435-6000	5013	✓

Email Addresses

Customize | Find | View All | 📊 | 📅   First ◀ 1 of 1 ▶ Last

Email Type	Email Address	Preferred
WORK	brubble@SCSD.US	✓

🖫 Save | 🔍 Return to Search | 📧 Notify | 🔄 Refresh   🖺 Update/Display | 🖺 Include History

Contact Information | Regional

FREQUENTLY USED FORMS

In District Travel

Print Form

CITY SCHOOL DISTRICT
SYRACUSE, NEW YORK

Enclosure 1
Policy# 8422

REQUEST FOR INTERSCHOOL TRAVEL REIMBURSEMENT

Claimant _____   Department/School _____

Address _____   Employee Id # _____

City _____ Zip _____

I.   Application

I hereby apply for : (check one)

A.   Reimbursement for inter-school travel, effective

☐   A regular travel schedule
☐   An irregular travel schedule

B.   ☐   A Federal income tax letter (use enclosure 4)

II.   Reimbursement Procedure

A.   *Regular Travel Schedule* - If your travel does not vary substantially from week to week, use the chart below to indicate the mileage between your assigned locations for a sample week (use the attached Mileage Index). If your assignment changes during the year, you will be required to file an extended application.

Day	From School	To School	Miles Per Travel Index	Audit Use Only
Mon				
Tues				
Wed				
Thurs				
Fri				
Total Miles per Week:				

B.   *Irregular Travel Schedule* - If your travel varies from week to week, you will be reimbursed on the basis of your actual mileage. You must maintain a detailed daily log on the Statement of Auto Travel Form.

Date: _____

_____   _____
Signature of Applicant   Signature of Immediate Supervisor

Please provide Budget to be charged: _____

FINANCE DEPARTMENT USE ONLY

Budget to be charged: _____

_____   _____
Chief Financial Officer   Date

Scholarships

Print Form

Syracuse City

School District

REQUEST TO ESTABLISH A SCHOLARSHIP

☆ **DONOR INFORMATION**

Donor Name:_____ **Date:**_____

Donor Address:_____
        (Street)   City   State   Zip

Donor Contact Name:_____ **Telephone #:**_____

Donor Contact Title:_____ **Fax #:**_____

Donor Contact Signature:_____ **E-mail:**_____

☆ **SCHOLARSHIP INFORMATION**

Name of the Scholarship Fund to be Created:_____

Amount of Annual Scholarship Award(s): $_____ **Number of Annual Awards:**_____

In Memory Of:_____ **In Honor Of:**_____

Other Scholarship Information:_____

☆ **FINANCIAL INFORMATION**

Which type of scholarship will this be?   ☐ *Annual*   ☐ *One Time*   ☐ *Endowment*

If the scholarship will be annual, please specify the funding mechanism:

☐ *Annual Contribution of $*_____ *per year*

Annual scholarships can be established with an initial commitment the year that the scholarship is established. An annual scholarship is not a permanent fund and is awarded only as long as the donor or other benefactors choose to contribute to the fund.

☐ *One Time Contribution of $*_____

A One Time contribution will be awarded per the instructions of the donor until all funds have been expended.

☐ *Endowment with gift of $*_____

Endowed scholarships are designed to be permanent and perpetual. The principal of the fund is invested to produce income, and an annual award is made to a student. The principal is not expended so the endowment can last into perpetuity.

⭐ SCHOLARSHIP SELECTION REQUIREMENTS

Please indicate preferences in the composition of the scholarship selection committee:

☐ *Principal*   ☐ *Assistant Principal*   ☐ *Guidance Counselor*   ☐ *Teacher in Field of Study*

☐ *Director/Administrator*   ☐ *Coach*   ☐ *Other:*_____

Additional selection criteria: _____

⭐ SCHOLARSHIP ELIGIBILITY CRITERIA

Must the student be attending a particular high school?   ☐ *Yes*   ☐ *No*
*If yes, please specify school:*_____

Is there a grade point average eligibility requirement?   ☐ *Yes*   ☐ *No*
*If yes, please specify range:*_____

Is there a financial need eligibility requirement?   ☐ *Yes*   ☐ *No*
*If yes, please specify criteria:*_____

Is there a specific major/field of study required or preferred?   ☐ *Yes*   ☐ *No*
*If yes, please specify criteria:*_____

Additional scholarship eligibility criteria and donor restrictions (*attach additional pages if necessary*):
_____
_____
_____

If you wish to change your requirements or modify the scholarship amount, please contact the Chief Financial Officer of the Syracuse City School District. All checks and future payments should be sent to the Chief Financial Officer at the following address:

<div align="center">

Chief Financial Officer
Syracuse City School District
1025 Erie Blvd. West
Syracuse, NY 13204-2749

</div>

Checks or other gifts should be made payable to the Syracuse City School District. Please specify the scholarship fund name on the payment.

For Office Use Only	
Date Received:_____	Scholarship Program Code:_____
Date Processed:_____	Bank Account Number:_____

Travel Expense Reimbursement

http://www.syracusecityschools.com/tfiles/folder495/Travel%20Expense%20Statement%20Form.pdf

Syracuse City School District

SYRACUSE CITY SCHOOL DISTRICT
TRAVEL
EXPENSE STATEMENT

EVENT: _____

PLACE: _____

DATES: _____

NAME: _____ BUILDING LOCATION: _____

	SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY	TOTAL FOR WEEK
DATE:								
I. TRANSPORTATION								
A. AUTO, _____ MILES AT _____ (RATE)								
B. PLANE_____, BUS_____,* TRAIN_____, RIDING w/,* OTHER___, DIST CAR_____*								
C. THRUWAY TOLLS*								
D. OTHER TOLLS AND PARKING FEES*								
E. TRANSPORTATION CHARGES TO & FROM AIRPORT*								
II. LODGING & MEALS								
A. AMERICAN PLAN (room and meals combined)*								
B. EUROPEAN PLAN (hotel expenses)*								
C. MEALS (details required for claim) maximum								
Breakfast - $9.00 ($12.00 in high cost area) B								
Lunch - $13.00 ($17.00 in high cost area) L								
Dinner - $24.00 ($30.00 in high cost area) D								
III. OTHER EXPENSES								
A. REGISTRATION FEE ETC.*								
B. OTHER (explain)*								
TOTAL EXPENSES								

REMARKS: * Receipts Required

CLAIMANT'S CERTIFICATION: Sign this request for reimbursement after trip is completed and submit to the Accounts Payable Dept. with receipts, approved Request for Excused Absence, and proof of attendance such as an itinerary or certificate of completion.

I hereby certify that the above claim for reimbursement in the amount of $_____ is true and correct and that the services charged were actually performed, delivered, or made within the dates stated; that the items are correct; that the sums charged are reasonable and just; that no part has been paid or reimbursed from other sources; that taxes from which the School District is exempt are not included, and that the amount claimed is actually due.

_____   _____   _____
         Signature   Mailing Address   Date

Donations

Syracuse City SCSD School District

☆ **REQUEST TO MAKE DONATION FORM**

☆ **Donor Name:** _____ **Date:** _____

Donor Address: _____
(Street)   City   State   Zip

Donor Contact Name: _____ **Telephone #**_____
Contact Person's Title: _____

☆ **Donor Contact Signature:**_____

Donation Description: _____

☆ _____ **Value: $** _____

For cash donations only:

Were these funds earned through a fundraiser?   ☐ Yes   ☐ No

Are these funds designated for use by a specific school building?   ☐ Yes   ☐ No

If yes, name of school or school department:

| Example: Levy M.S. Music Department | _____ |

Is the donor stipulating any spending restrictions?

                ☐ Yes   ☐ No
                If yes, please describe below:

| Examples: Funds to be used to purchase computer software; or, funds to be used to purchase football uniforms. | _____ _____ |

Please attach other documents to this form

☆ *For donations of specific goods or services:*

Is the item being donated new or used?   ☐ New   ☐ Used
Approximate age of the item: _____

Is the item being donated to a specific school or program?
                ☐ Yes   ☐ No

*If yes, specify:*_____

☆ **FOR ECA ACCOUNTS?** *If yes, specify Chase account number:*_____

May the Superintendent use his/her discretion as to where the item is housed to bring the most benefit to the most children?   ☐ Yes   ☐ No

Please attach other documents to this form

☆ **Form completed by:**_____
           District Employee Name   Location   Date

Budget Transfer Form

Syracuse City School District
Fiscal Services Department: BUDGET TRANSFER REQUEST

Chart Field String										
Fund	Function	OpUnit	Account	Dept	Progra	Function Description	Object Description	Increase	Decrease ( )
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
								-	-
TOTAL								0.00	0.00

EXPLANATION:

Preparer: _____ Dept: _____
Signature Printed Name

Budget Approver: _____ Dept: _____
Signature Printed Name

Fiscal Services Approval Use Only:

Approved: ☐   Disapproved: ☐   Delete: ☐   Date: _____

Signature: _____   Title: _____

Journal Entry Number: _____   Entered by: _____   Entry Date: _____