Children's Services Council of Broward County
Our Focus is Our Children.

COPY BUDGET(S) IN NEXUS

Prepared by the Finance Department
April 2024

Before you get started

Before starting your budget, review the previous year's budget in detail. This is important because you will need to update the system with any changes to the position and fringe benefit rates before you begin.

The COPY budget entry is a step-by-step process. You must follow the sequence of steps to ensure a successful entry and approval. Not following the sequence of steps below may require you to DELETE the budget and start over.

Copying your Previous Budget – If the previous year's budget in Nexus is similar to your new budget, you may copy it. Copying the prior year's budget will copy all budget information, including narratives. This is intended to save data entry time.

☐ The **budget workflow must be set up** before you can copy your budget in NEXUS. Your Agency's NEXUS administrator manages the workflow set up for your new contract. Support: Wiki (nexuscscbroward.org)

☐ **Only the budget creator** can create, edit, or modify changes in the Budget in NEXUS.

☐ **Only the budget creator** can create, edit, or perform changes to positions and staff in Position Management.

☐ If the **Budget is rejected** at any point in the process, it goes **back to the budget creator**, for only they can make changes.

The Copy Budget Entry Process

STEP 1. Define Fringe Benefits % Rate	Pg. 3
STEP 2. Assign Funders/Match – Cash, In-Kind, or Leverage (Delivery Module)	Pg. 7
STEP 3. Entering the Staff Names (Fiscal Module)	Pg. 9
STEP 4. Creating & Assigning New Positions (Fiscal Module)	Pg. 11
STEP 5. Copy the Previous Period Budget - (Fiscal Module)	Pg. 20
Index	Pg. 22

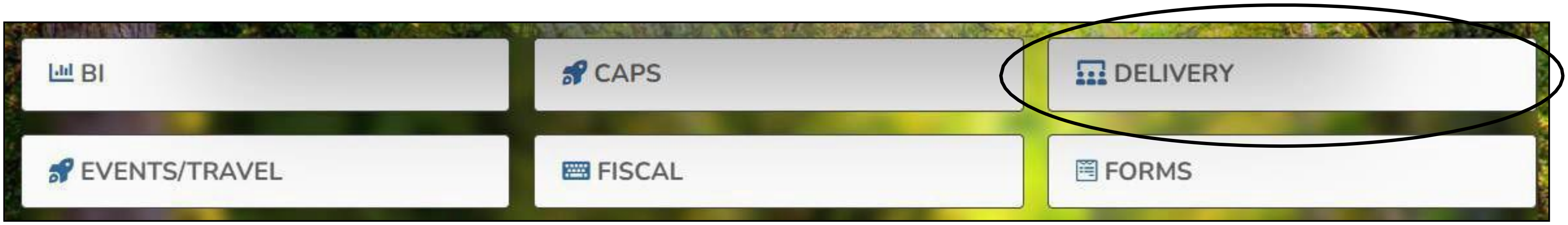
https://www.nexuscscbroward.org/

STEP 1. Define Fringe Benefits % Rates (Delivery Module)

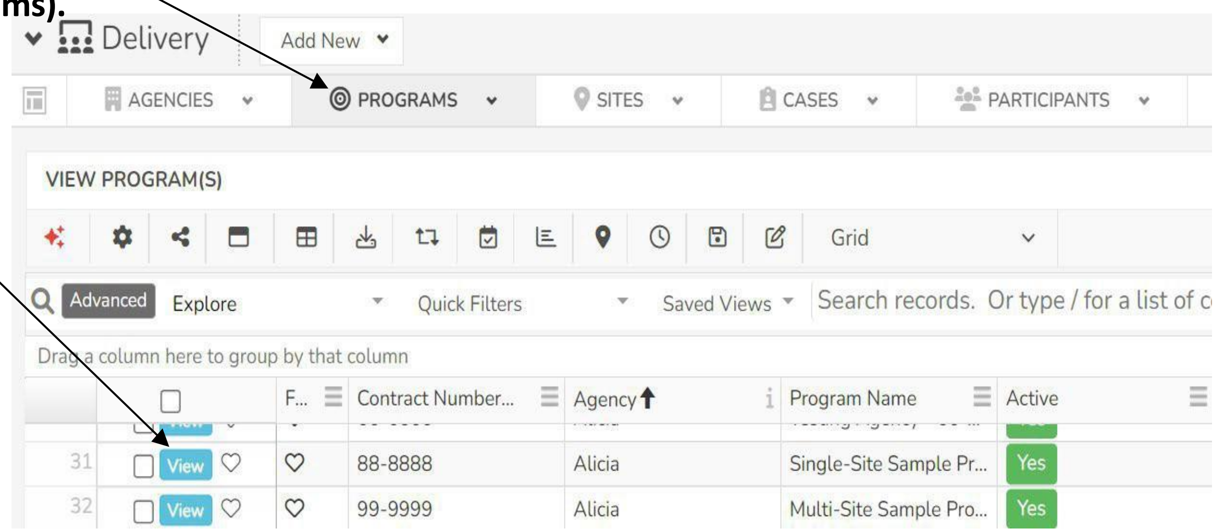
FICA is auto-populated in the Budget; therefore, **FICA** is not part of the fringe benefits described here. The fringe benefits are retirement, health insurance, worker's compensation (WC), and SUTA. Only enter % rates for fringe benefits calculated by multiplying the **% rate X gross salary** across **ALL** positions in the Budget.

For the most part, **WC** will be the only fringe benefit to apply, but there are some exceptions.

- To define the fringe benefits % rates, begin by selecting the **DELIVERY** module.

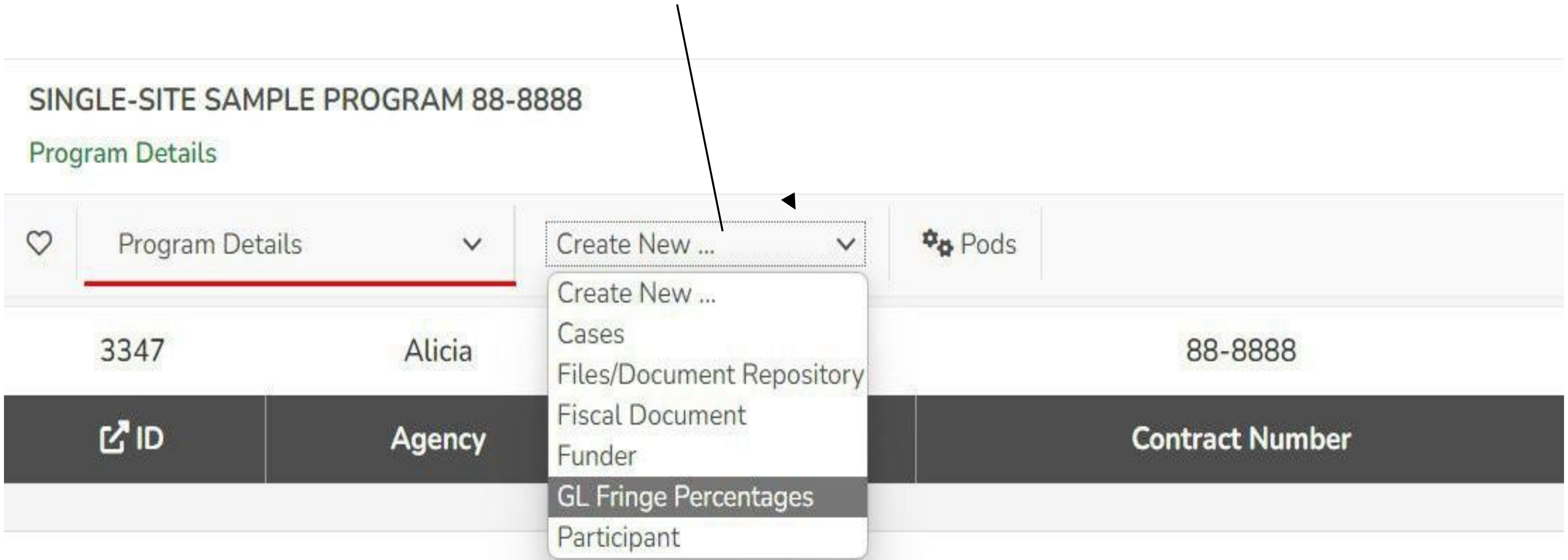


- From the main navigation menu, select **PROGRAMS Select your Program (agencies with multiple programs).**



STEP 1. Define Fringe Benefits % Rates - Create New

➢ To assign a fringe benefit, click on the **Create New** dropdown menu. Then select **GL Fringe Percentages.**



- For the most part, **WC** will be the only fringe benefit to apply, but there are some exceptions.
- The calculation **= % rate X gross salary across ALL positions** (rounded to the nearest dollar).
- Do not enter monthly costs (such as health insurance cost), only **%** rates.

STEP 1. Define Fringe Benefits % Rates

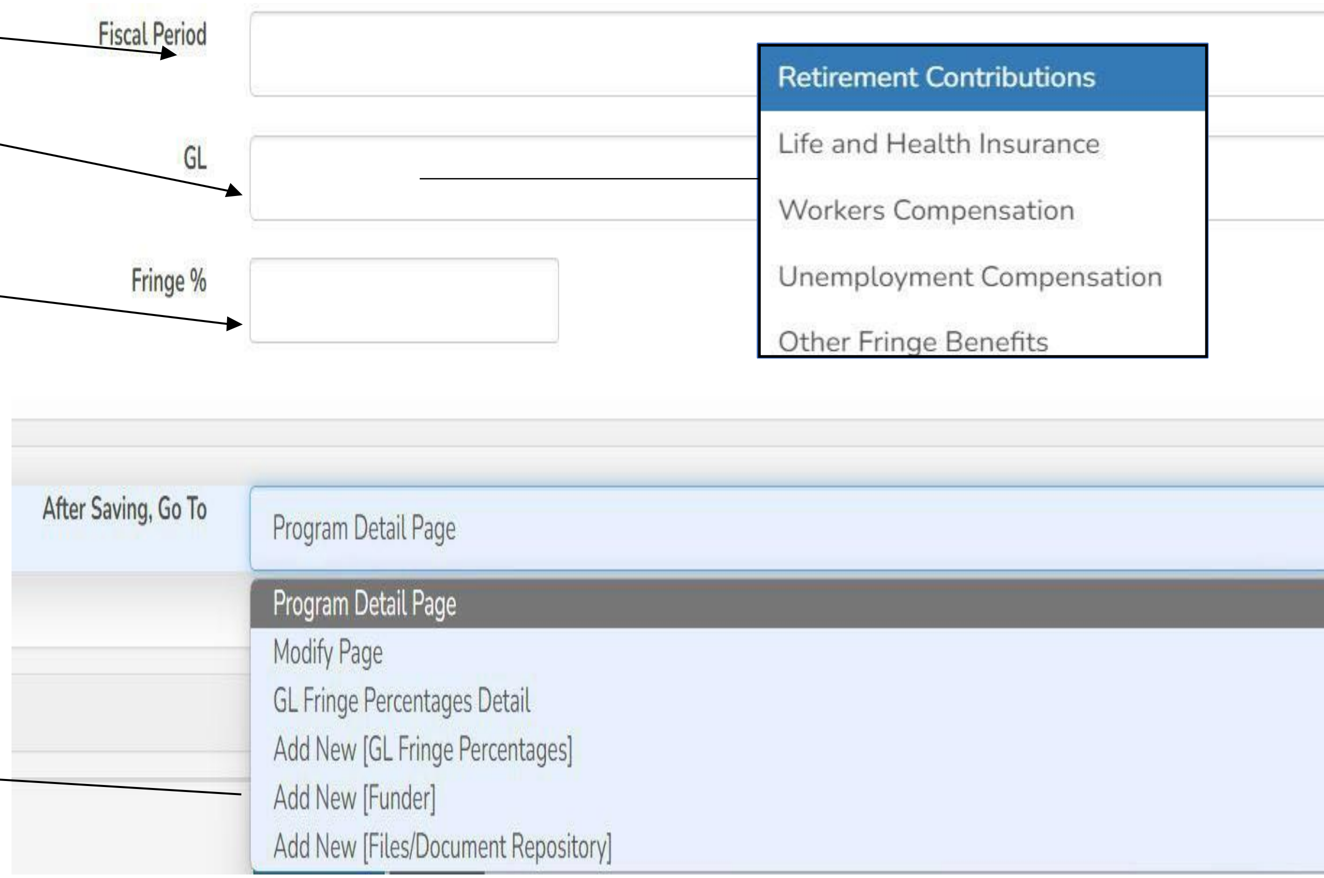
Complete the required fields:

- Select your **Fiscal Period**
- Select the Fringe Benefit **GL**
- Enter the **Fringe %** rate
  - up to 2 decimal points
  - **no** % sign needed.

    e.g., 2.36% = 2.36

Before you click save, Select your next move from the dropdown menu.

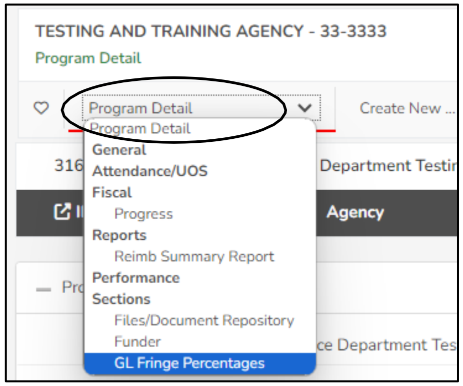
- To assign a second fringe benefit % select **Add New [Funder]**, and Save!



STEP 1. Fringe Benefits & Funders – Review & Corrections

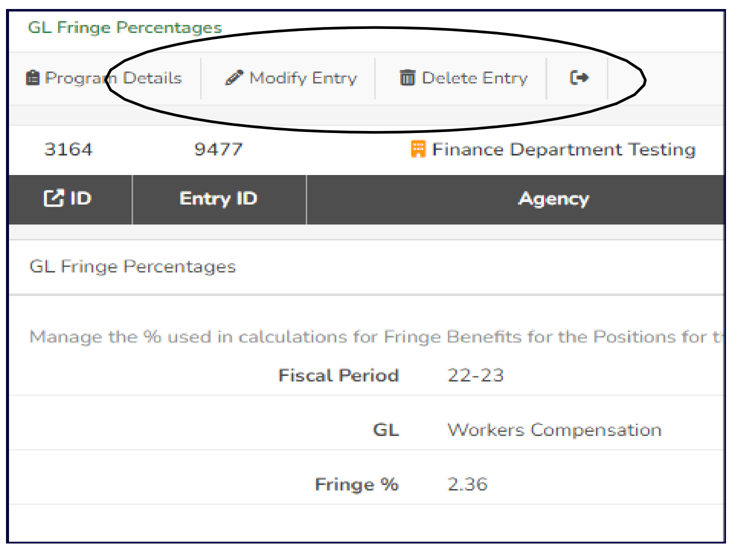
Review your entry and make corrections to GL Fringe benefits or Funders assigned.

Delivery Module > Select your Program, click on View > Program Detail dropdown > Select Funder OR GL Fringe Percentages



Review the entries. **Click on View if a correction is needed.**

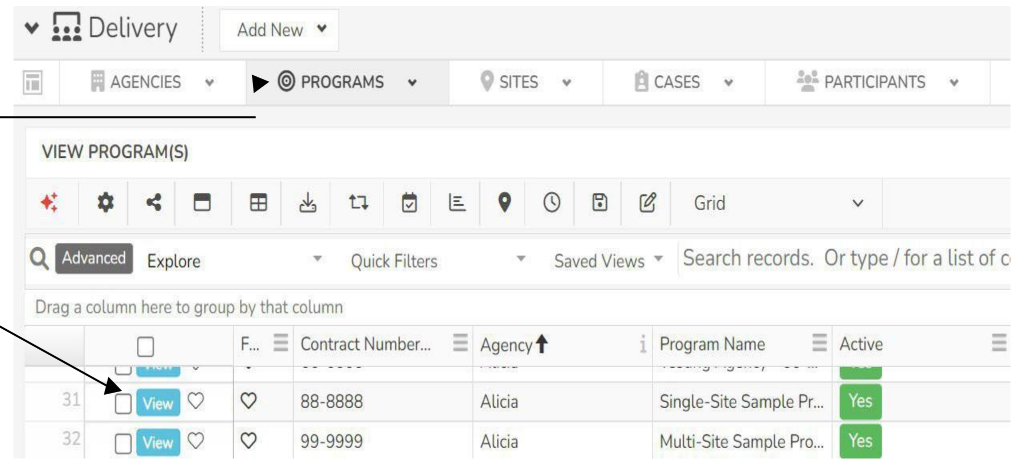
Proceed to ***Modify or Delete*** the entry.



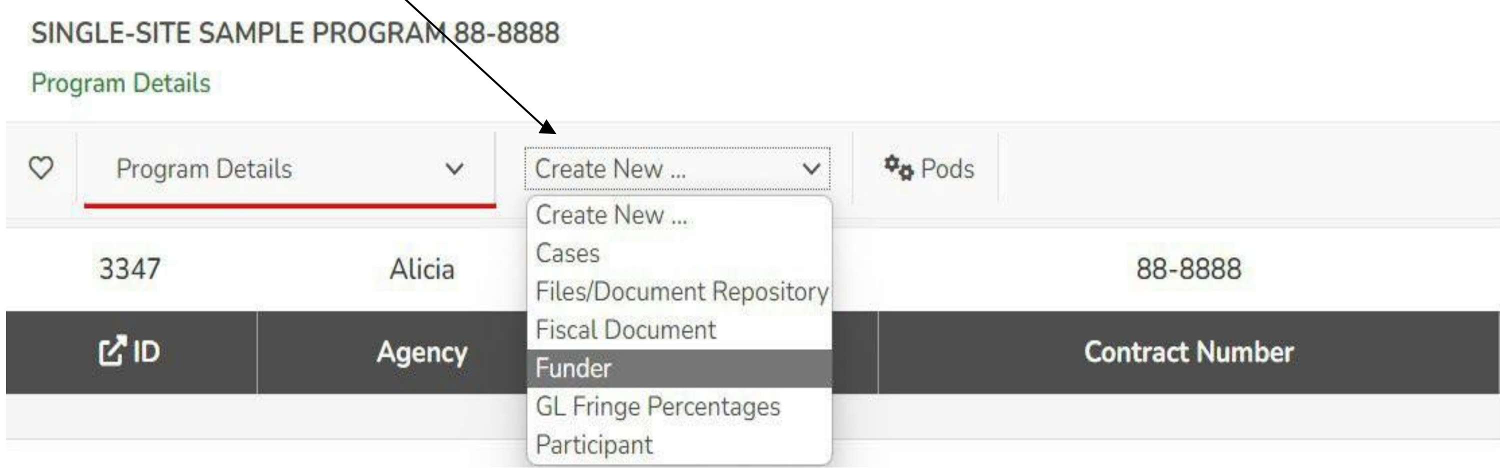
STEP 2. Assign Funders/Match – Cash, In-Kind, or Leverage (Delivery Module)

Review your approved budget detail to note the type of funders CSC approved - Cash, In-Kind, and or Leverage.

- **DELIVERY Module > Programs Tab**
- Select your Program by clicking on **View.**

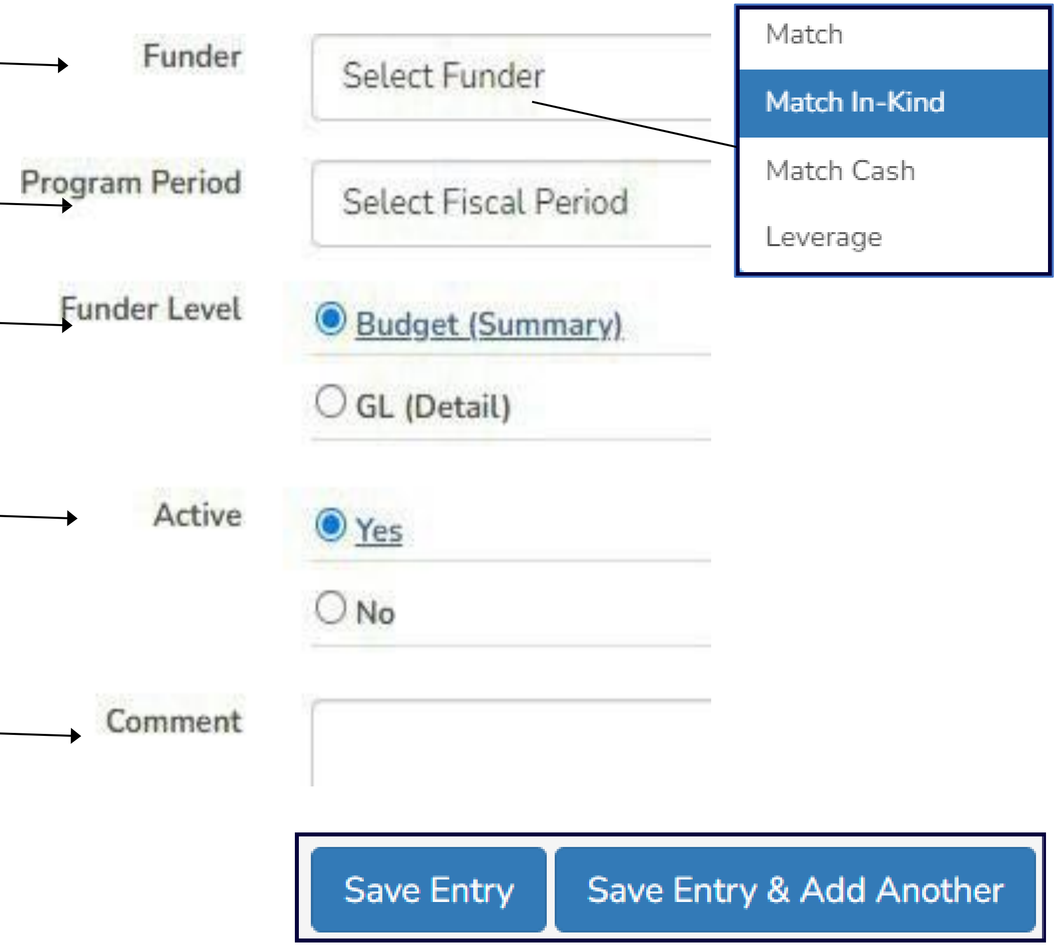


- To assign a funder, click on the **Create New** dropdown to **Funder**



STEP 2. Assign Funders/Match – Cash, In-Kind, or Leverage

- Select the **Funder** type.
  Match In-Kind
  Match Cash
  Leverage
- Select **Program Period**
- Select the radio button for
  Budget (Summary)
- Select the Active radio button for
  Yes
- In the **Comment** box,
  briefly describe.
- **Save Entry or Save Entry & Add Another to record a second type of match…**

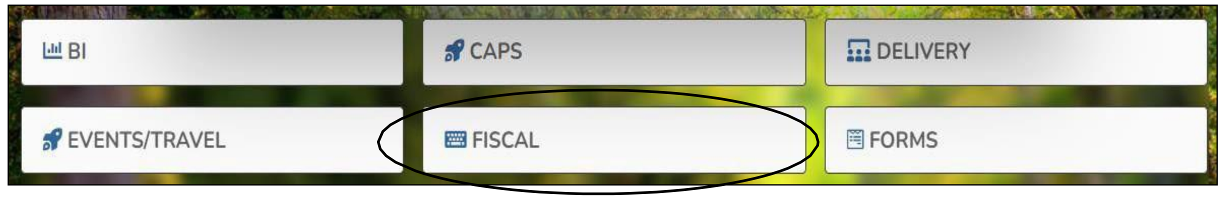


- **To review your entry or make corrections:**

Delivery Module > Programs > select VIEW on your program > **Program Detail dropdown** menu > select Funder > click VIEW on the erroneous entry > Modify or Delete Entry **(see details on Pg.6).**

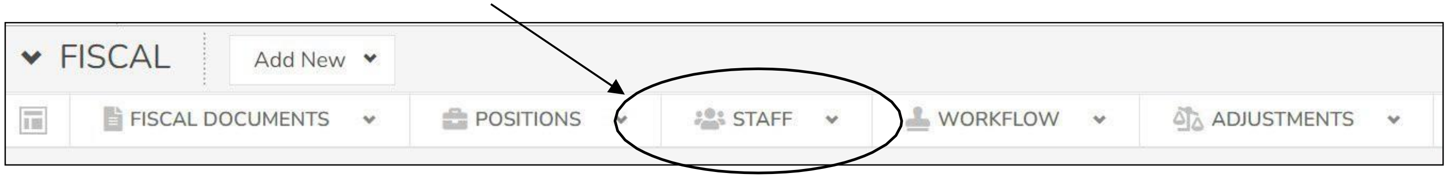
STEP 3: Entering the Staff Names (Fiscal Module)

Step 3 requires us to move from the DELIVERY module to the FISCAL module. You can transition by clicking on the hamburger icon or the CSC logo in the upper left-hand corner of your screen and selecting FISCAL.



The Fiscal Module

- Under the FISCAL module, click on **STAFF**



An established provider should recognize the names of current and past staff members in the *Results List*.
If you have new staff members proceed to the next page.

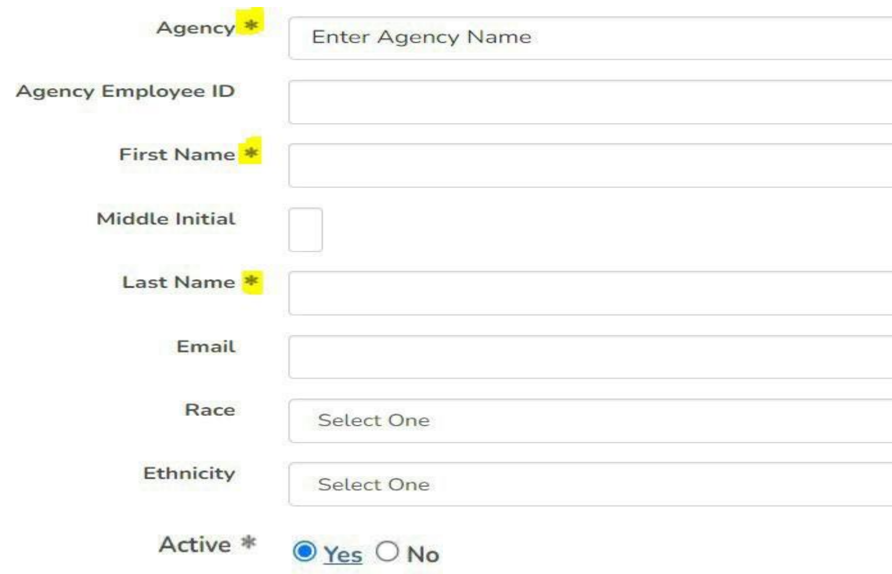
Quick Tip: Click on any of the *columns heading* to sort by that column.

		Active Programs	First Nam...	Last Na...	Active Positions	Date Created
1	View	3198: CSA Testing Agency 44-4444	Bruno	Mars	14282: Senior Programs Manager	9/11/2019
2	View	3198: CSA Testing Agency 44-4444	John	Brown	14288: Counselor	9/18/2019
3	View	3198: CSA Testing Agency 44-4444	Kirk	Dasos	14288: Counselor	6/25/2020
4	View	3164: Testing Agency - 33-3333| 319...	Janet	Jackson	13823: Therapist| 14289: Program Assistant	9/11/2019
5	View	3164: Testing Agency - 33-3333	Elan	Rusk	13822: Seniors Programs Manager	6/25/2020

STEP 3: Entering the Staff Names, cnt'd.

Record the names of the staff members working in the Program. If a position is currently vacant, no name will be required. You will need to update NEXUS as you hire the staff at a later date.

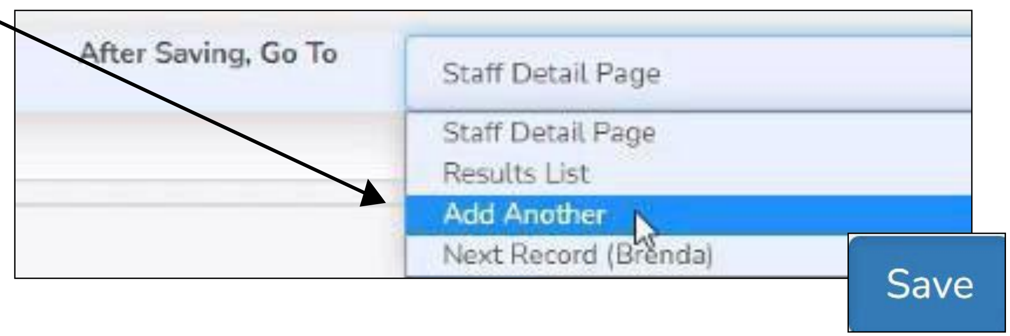
- Click the **+ New Staff** button



- On the form, items marked by an *asterisk are required fields:

  Agency, First Name, and Last Name

- Use the efficiency dropdown menu to select ***Add Another*** if making multiple entries. First, make your selection, then click Save.
- When all the new names have been entered, select ***Results List*** to review your new staff roster!



STEP 4: Creating & Assigning Positions (Fiscal Module)

Step 4 takes place in the FISCAL module. On the main navigation menu, click on the POSITIONS tab.

Because you are an **established provider**, all the CSC's positions funded, past and present, will be visible. The *Results List* can be sorted by clicking on the *column heading* of your choice.

Associated Programs	Position ID	Title	Associated ...	Hourl...	Full or ...	Ho...	Date Creat...
Testing Agency - 66-6666	**14931**	**PUP Supervisor**	**Joshua Sue**	**35**	**Full-Time**	**2080**	**3/30/2022**
Testing Agency - 66-6666	14932	PUP Clinician	Becky Sue	25	Part-Time	1040	3/30/2022
Testing Agency - 66-6666	14933	Administrative Support	Lecky Sue	15	Full-Time	2080	3/30/2022
Testing Agency - 66-6666| Testing A...	14940	Teacher 1	Becky Sue| Beck...	0		2080	4/14/2022
Single-Site Sample Program 88-8888	14943	Program Director	John Pink	38.46	Full-Time	2080	4/21/2022
Single-Site Sample Program 88-8888	14944	Lead Therapist	Mary James	28.85	Full-Time	2080	4/21/2022
Single-Site Sample Program 88-8888	14945	Family Support Worker	Sue Brown	25	Part-Time	2080	4/21/2022

IMPORTANT NOTES to the Creator of the Budget:

- ☐ After creating a position, it is permanently stored in your Agency's *position library*.
- ☐ A position is assigned to a program using the specific contract number offered in the dropdown menu in the setup process.

STEP 4: Creating & Assigning Positions – Notes to the budget creator

NOTES to the Budget Creator – cont'd.

- ☐ A position is only assigned once and will remain active in the Program for the term of the RFP, a four-year term for CSC Broward (or until the position assignment is end-dated/terminated).
- ☐ Multiple programs can share a position, but the allocation cannot exceed 100%.
- ☐ The staff member filling the position may change throughout the contract period (turnover); update the staff assigned.
- ☐ Position management is an active, ongoing function of program management. Staff name(s), start, and end dates must be updated monthly.
- ☐ All contracts are required to maintain an up-to-date staff roster in NEXUS.

STEP 4: Creating & Assigning Positions

You are a returning provider, and the contract number remained the same (CSC has 4-year RFP cycle):

- A good starting point is the previous fiscal year budget in NEXUS. Review the positions' titles and prior year % allocations. Do they match? If not, we will need to update the changes in Position Management.

If the position title changes (not an exact match): The staff, program assignment, and position **must be end-dated and closed**. The old position becomes inactive in the position library.

If the title matches, but the Type of Wage, Hourly Rate, Hours per Year, % Time in Program, or Weeks Funded changed: All of these changes will need to be made within the budget form in Nexus.

Salary & Wages > Select the Position by clicking on the title > update the data as applicable.

SALARY ACCOUNT: REGULAR SALARIES AND WAGES

ID	Position	Staff
14861	Administrative Assistant	Janet Brown (4581)

Staff	Janet Brown
Type of Wage *	○ Salary ◉ Hourly
Hourly Rate *	$ 28.85
Hours per Year *	1248
% Time In Program *	60 %
Full or Part-Time	Full-Time
Weeks Funded *	52
Note	

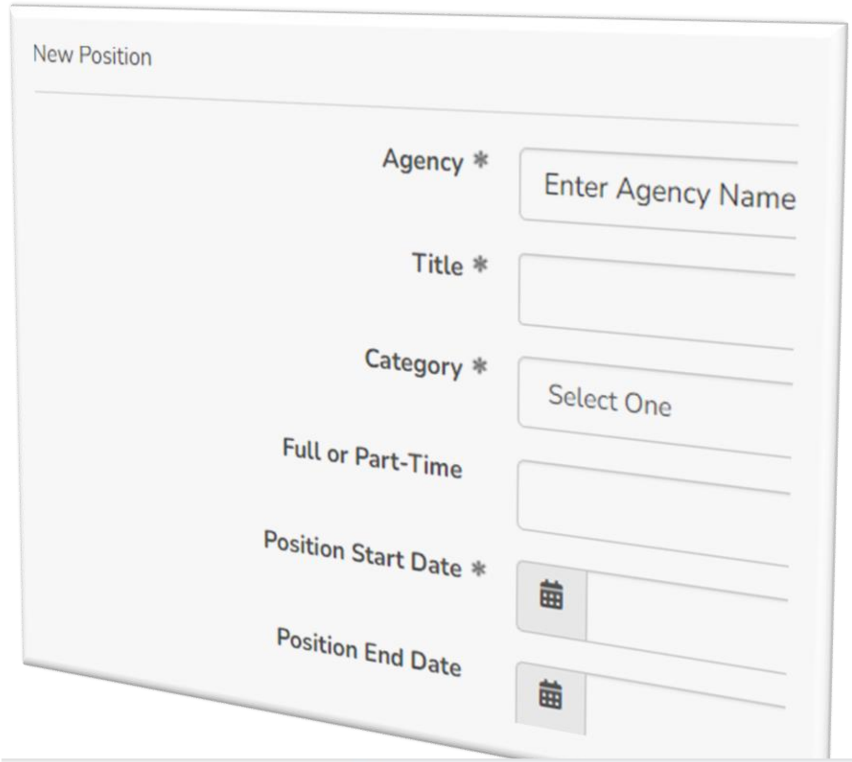
NEW position to the Program: Create the new position (Pg. 14).

If a position has been eliminated and will not be part of the new contract year: The staff member, program assignment, and position will need to be end-dated/closed before populating the new budget.

STEP 4: Creating a Position (Fiscal Module)

Creating a Position (Positions Tab)

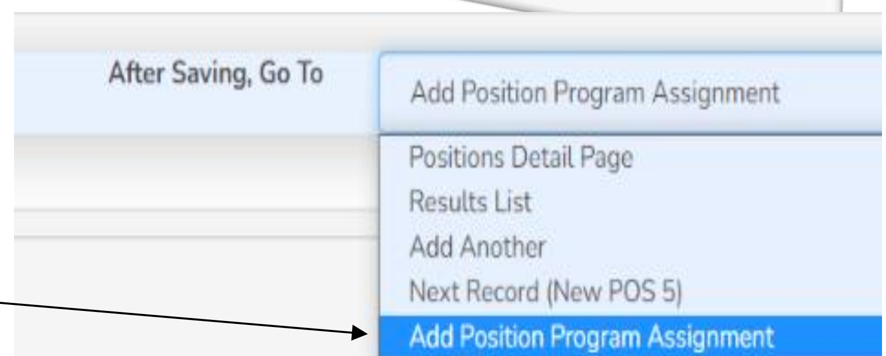
Click on the + New Position button.

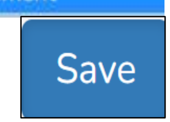


On the form, items marked by an *asterisk indicates it is a required field.

- Select your **Agency**
- Enter the **position's title** –
  DO NOT USE ALL CAPS
  Capitalize Each Word
- **Category** – obtained from the contract's staffing chart
  Professional – BA, Master, or Doctorate
  Paraprofessional – GED, HSD, and AA/AS
- **FT** or **PT –** to your agency
- **Position Start Date** aligns with the contract start date.
- **NO Position End Date** – we are building the budget.
- Use the efficiency dropdown menu to select

Add Position Program Assignment
First, make your selection, then click Save.



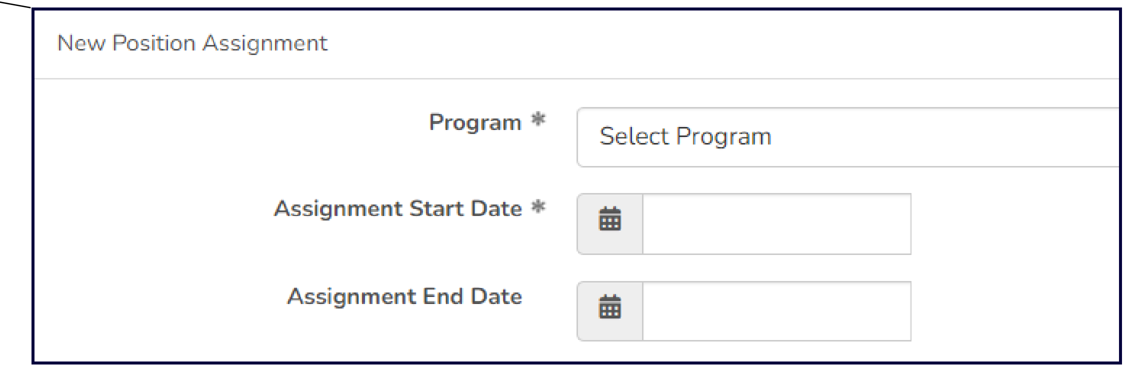


STEP 4: Assigning the Position to the Program

Assigning the Position to a Program

First, you will assign your new program/contract #. Second, you will record the staff member's details

Program Assignment



- Select your program/contract number
- Assignment Start Date –
  same as the contract start date.
- **No** Assignment End Date –
  we are building our budget.

Staff Assignment continues on the next page…

- For **VACANT** positions, the ***Select Staff*** field **will remain blank – no selection is made**. At a later date, when the position is filled, we will record the newly hired staff member - Pg. 9 Entering the Staff.

STEP 4: Assigning the Staff to a Program

Assigning the Staff to a Program

Staff Assignment

Staff	Found In Budget	Hr/Yr	% of Time	Start Date	End Date	Last Check Run Date	Termination
Select Staff							Select One

Select the staff member's name from the dropdown menu. Don't see the name, see page 9 – Entering the Staff.

if the position is vacant at the time of the budget entry leave the Select Staff field blank, but continue to enter the information in the following fields:

- **Hr/Yr:** the # of hours per year a staff member works annually for the Agency (40 hrs. per wk. X 52 wks. per yr. = 2,080 hrs.). A PT staff member of the agency would report fewer hours than 2,080 annually.
- **% of Time:** the % allocation of the specific staff member hours to the position – time allocation may not be greater than 100% for any employee.
- **Start Date:** if the position is **vacant**, the start date **=** the contract's start date. If the position is **filled**, the start date **=** the staff member's hire date. Vacant positions will be updated when you hire the staff.

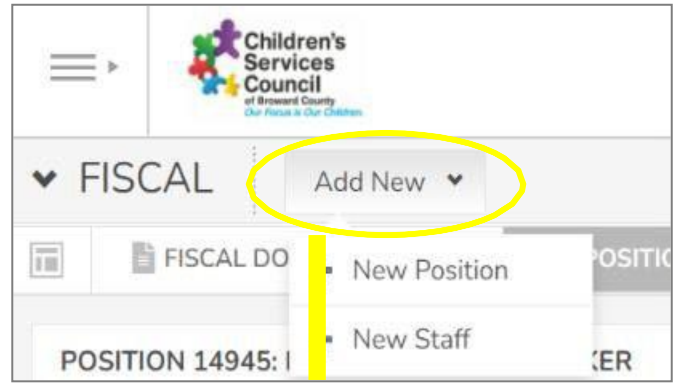
No Position End Date – we are building the budget. The end date is recorded when the staff member is terminated from the program.

No Last Check Run Date - required when you terminate a staff member. It is the final check run in which the staff member reports to the program, and the Agency pays wages.

h - also required when terminating an individual from the program.

STEP 4: How To Review the Positions Assigned to your Program

Assigning Staff to a Program (Cont'd)



Quick Access to add a New Position or Staff

- Repeat the steps for all positions that need to be created - Pg. 14 Creating a Position.

  Fiscal > Positions Tab > **+** New Position or use the quick access

- Once all the positions are created and staff is assigned, you can review the roster by clicking:

  Positions Tab > Sort the listing by Associated Program

- NEXUS will display an alert if:

  A position is over 100% allocated across CSC programs

  A staff member is over 100% allocated among all CSC positions

- A notification of an over-allocation error must be corrected before the budget is submitted. See Pgs. to troubleshoot.

- Repeat the steps for all new positions (Pg 14).

STEP 4: Reassigning a Position to a Program

Reassigning a Position to a Program (Positions Tab)

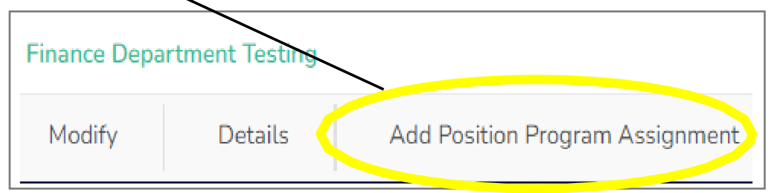
- Start by recording the names of newly hired staff members into NEXUS. Complete the step before you begin to reassign the position(s) to the contract Pg. 9 Entering the Staff

- Next, review your active positions roster in NEXUS: **Fiscal > Positions Tab** Note titles and Position ID.

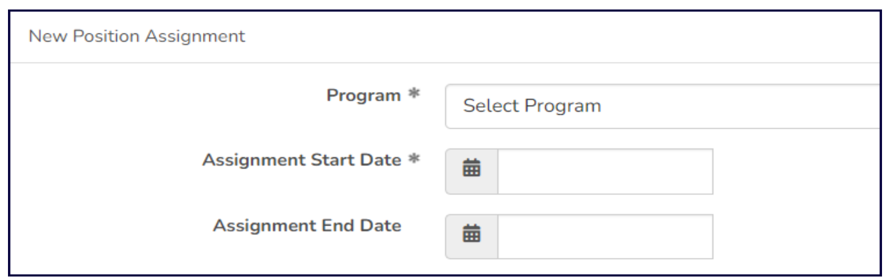
  TIP: You can also review Position IDs using the prior year's program budget in NEXUS or the last Reimbursement Detail Report.

- Under the Positions Tab, find the positions you will need by title and note the Position ID# **>** click on View

- Click the ***Add Position Program Assignment*** button to reassign the position.



- Assign the new program
  - Assignment Start Date – same as the contract start date.
  - No Assignment End Date – we are building our budget.



- Continue to record the staff member… next page

STEP 4: Reassigning a Staff to a Program

Staff Assignment

Staff	Found In Budget	Hr/Yr	% of Time	Start Date	End Date	Last Check Run Date	Termination
Select Staff							Select One

Select the staff member's name from the dropdown menu. Don't see the name, see page 9 – Entering the Staff. <u>Leave the Select Staff field blank if the position is vacant at the time of the budget entry,</u> but continue to enter the information in the following fields:

- **<u>Hr/Yr:</u>** the # of hours per year a staff member works annually for the Agency (40 hrs. per wk. X 52 wks. per yr. = 2,080 hrs.). A PT staff member of the agency would report fewer hours than 2,080 annually.
- **<u>% of Time:</u>** the % allocation of the specific staff member hours to the position – time allocation may not be greater than 100% for any employee.
- **<u>Start Date:</u>** if the position is **vacant**, the start date **=** the contract's start date. If the position is **filled**, the start date **=** the staff member's hire date. Vacant positions will be updated when you hire the staff.

No Position End Date – we are building the budget. The end date is recorded when the staff member is terminated from the program.

No Last Check Run Date - required when you terminate a staff member. It is the final check run in which the staff member reports to the program, and the Agency pays wages.

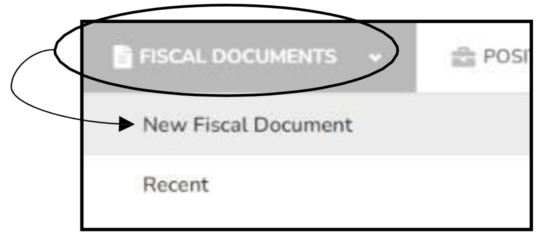
No Reason for Termination - also required when terminating an individual from the program.

Once all the positions are created and staff is reassigned, you can **review the roster** by clicking:

Positions Tab > Sort the listing by Associated Program

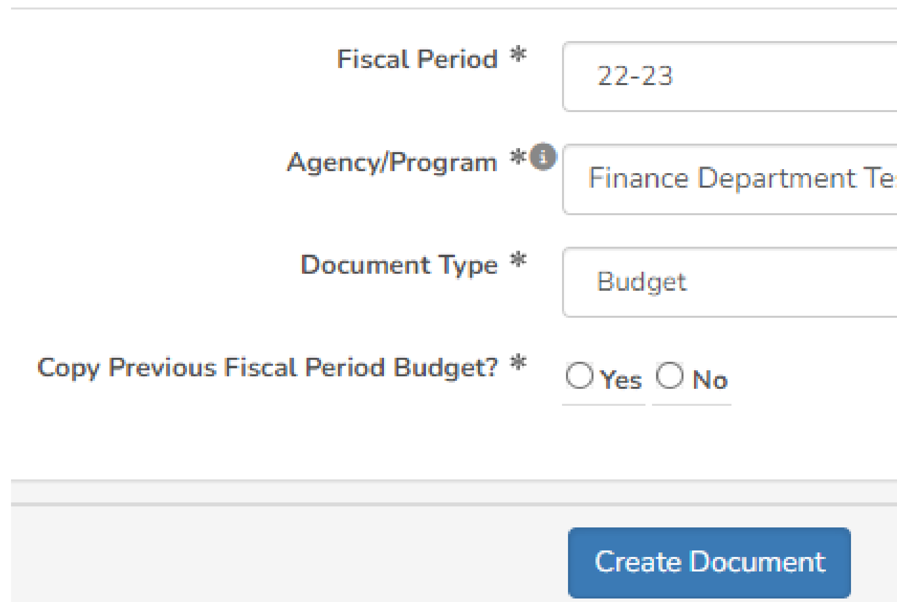
STEP 5: Copy the Previous Period Budget (Fiscal Module)

Step 5 takes place in the FISCAL module. On the main navigation menu, click on FISCAL DOCUMENTS > New Fiscal Document or click on the + New Fiscal Document button. Both paths provide access.



- Enter **Fiscal Period** – coincides with CSC's fiscal year
- Select your **Agency / Program**
- **Document Type –** Budget
- ***Copy Option*** is only available if the contract number did not change.

  This feature creates a copy of the prior Year's Budget, including positions and staff, wages and fringe, expenses, the match, account narratives, and $ amounts. **NOT AVAILABLE FOR A NEW AGENCY or NEW RFP.**
- Click on **Create Document** to create the budget



Please go through the newly populated budget in its entirety and update all verbiage and numbers as needed, including the match.

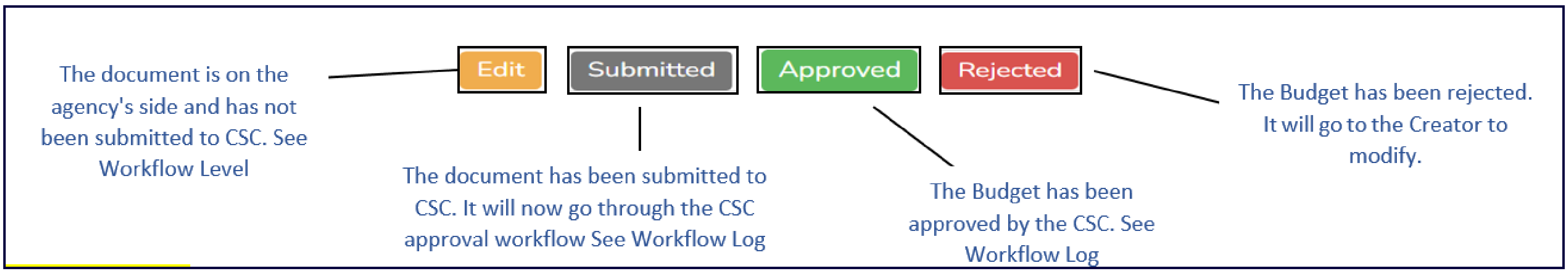
Additional Notes – The Budget Status & Types of Contracts

- **Congratulations**, you have completed copying your Budget in NEXUS!
- Give it a good review.
- Ready to Forward your Budget? 

- The Creator forwards the budget to the Reviewer (if applicable). Only the Submitter can submit the Budget to CSC.
- *Reviewers* on the workflow & the *Submitter* of the budget can either submit (budget moves forward) or reject the budget (back to the Creator) to adjust.

- Only the Creator can make adjustments in the budget.

Budget Status:



Page #	Subject
2	Before you get started
3	**STEP 1. Define Fringe Benefits % Rates (Delivery Module)**
4	STEP 1. Define Fringe Benefits % Rates - Create New
5	STEP 1. Define Fringe Benefits % Rates
6	STEP 1. Fringe Benefits & Funders – Review & Corrections
7	**STEP 2. Assign Funders – Cash, In-Kind, or Leverage (Delivery Module)**
8	STEP 2. Assign Funders – Cash, In-Kind, or Leverage
9	**STEP 3: Entering the Staff Names (Fiscal Module)**
10	STEP 3: Entering the Staff Names, cnt'd.
11	**STEP 4: Creating & Assigning Positions (Fiscal Module)**
12	STEP 4: Creating & Assigning Positions: Notes to the budget creator
13	STEP 4: Creating & Assigning Positions
14	STEP 4: Creating a Position (Fiscal Module)
15	STEP 4: Assigning the Position to the Program
16	STEP 4: Assigning the Staff to a Program
17	STEP 4: How To Review the Positions Assigned to your Program
18	STEP 4: Reassigning a Position to a Program
19	STEP 4: Reassigning a Staff to a Program
20	**STEP 5: Copy the Previous Period Budget (Fiscal Module)**
21	Additional Notes – The Budget Status & Types of Contracts
22	**Index**