Budget – Partners Tab

Note: Please be aware that there are some issues on this page that could not be resolved prior to the release of Phase 1. To make sure you do not lose any data, please click "Save Budget Partners" before you click "Add Partners to Budget", or after you have removed a partner from the list. We will be resolving these issues in upcoming releases.

The "Partners Tab" allows you to add all relevant partners that should be included on a job center budget and identify the footprint for each partner.

Important Note: Once you have applied a "Manual" allocation to any of the budget line items, the system will prevent you from Adding or Removing partners from the budget. You can still edit the allocation amounts, but you will need to remove "Manual" from all budget items before you can Add/Remove partners. To avoid re-work, we highly recommend that you finalize the partners tab before adding "Manual" allocation to the budget.

Important Note: Save any modifications to the "Partners" tab before clicking "Add Partners to Budget". Leaving any changes unsaved will trigger a navigation warning when you try to save the partners on the "Partner List", which can result in you losing data.

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- To can begin associating partners by clicking "Add Partners to Budget". This will bring up a list of all available partners. See "Budget Details – Partners Tab (Adding Partners)" for the steps to add partners.
- To modify the foot print for each partner, click "Edit", this will bring up four text boxes for each of the partner's allocation types. You can revert any changes you made by clicking "Cancel".
- 3) In each of the four text boxes you can identify the partner's footprint for each allocation type.

Some items to note:

- "Sq Ft" and "Custom" must be whole numbers, while "FTE" and "Customer Count" allow decimals.
- The system does not require that "Custom" be dollar values, arbitrary numbers or percentages. "Custom" has been created to allow flexibility to apply an allocation distribution other than "Sq Ft", "FTE" and "Customer Count." When calculating the budget distribution, the system will calculate a percentage for each partner based on the amount entered and total.
- Leaving any field blank for a partner will be treated as a 0 during distribution.
- 4) You can remove any partner from a budget by clicking on the \blacksquare
- 5) Click "Save Budget partners" to save any changes to the "Partner" tab. We recommend you do this often to avoid losing any data.

Budget Details – Partners Tab (Adding Partners)

The "Partner List" comes up once you click "Add Partner to Budget" on the "Partners" tab. The list contains all the available partners statewide.

Note: This "Partner List" maintained by DWD, if you do not see a partner on the list please contact your Local Program Liaison (LPL). The list of LPLs and their WDAs can be found on the <u>"Contact" page</u>.

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- 1) You can add a partner to a budget by clicking the 👽. Partners can only be removed from the "Partner" tab.
- 2) Once you have added partners, click "Save" to add them to your budget.