Skyward Instructions: Prepare File for Upload

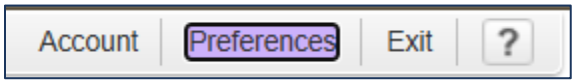
Original Budget-Amended Budget- FER Actuals

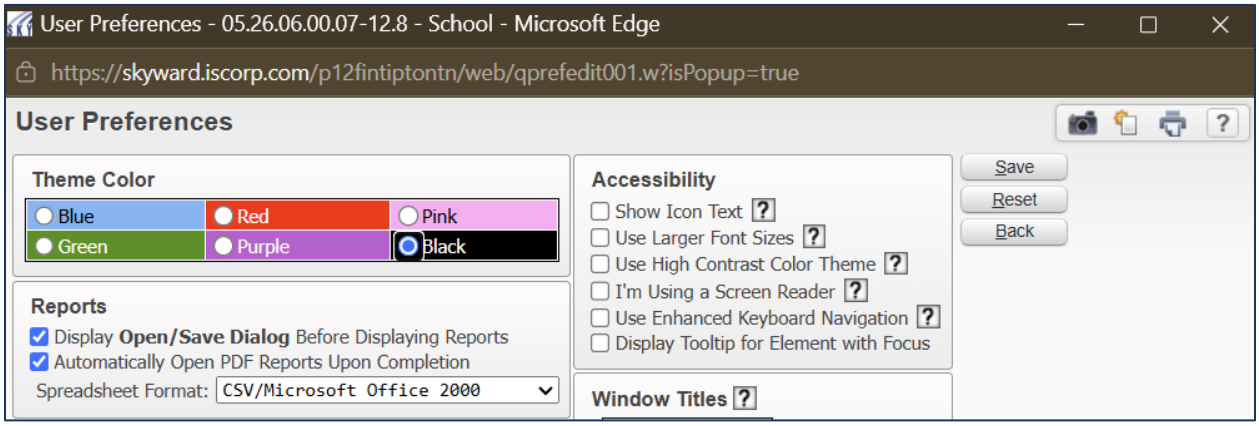
Purpose

Generate a report in Skyward that pulls original budgets, amended budgets, and Final Expenditure Report (FER) actuals into a single file for upload to ePlan. This will save LEAs time when entering State Funds budgets or FER data by using the upload feature in ePlan. This will also allow corrections to expenditures during the FER review process, which is not always possible when expenditures are hand-keyed.

Before Downloading the Report

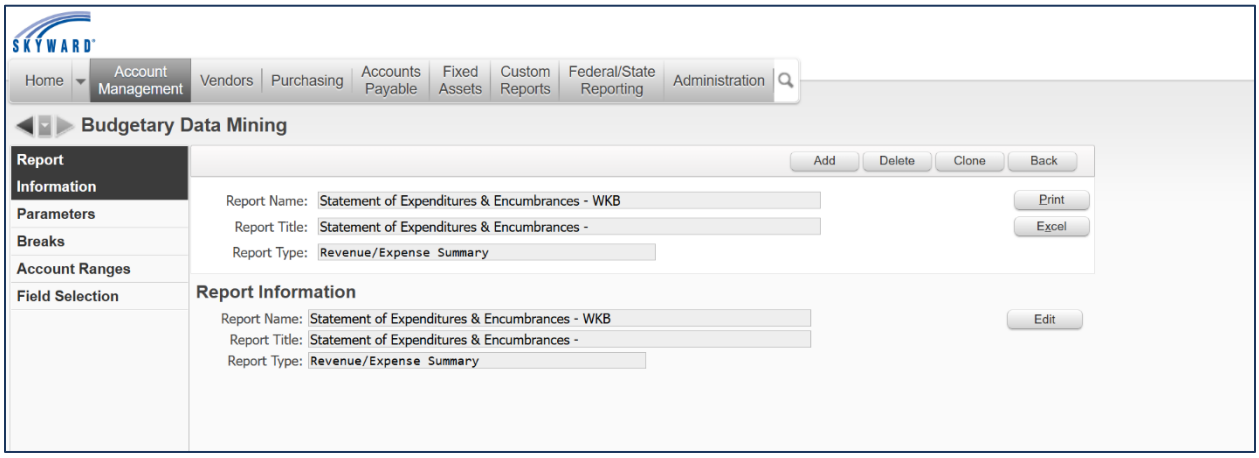
1. In Skyward, select **Preferences** in the upper-right corner.
2. Change the download format from **Excel** to **CSV**.
3. CSV format provides a cleaner and more user-friendly file for data transfer and upload preparation.





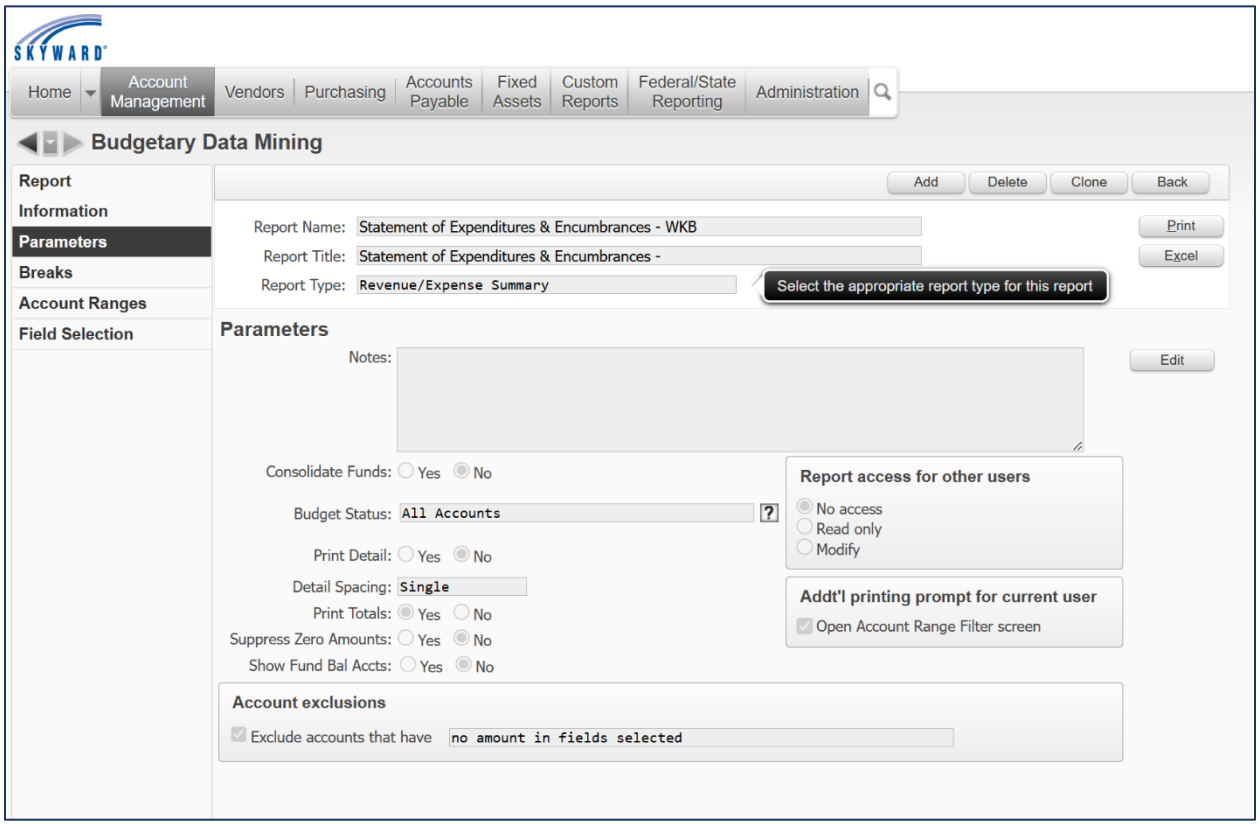
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Report Information



Parameters

1. Set the parameters to match the screenshot below

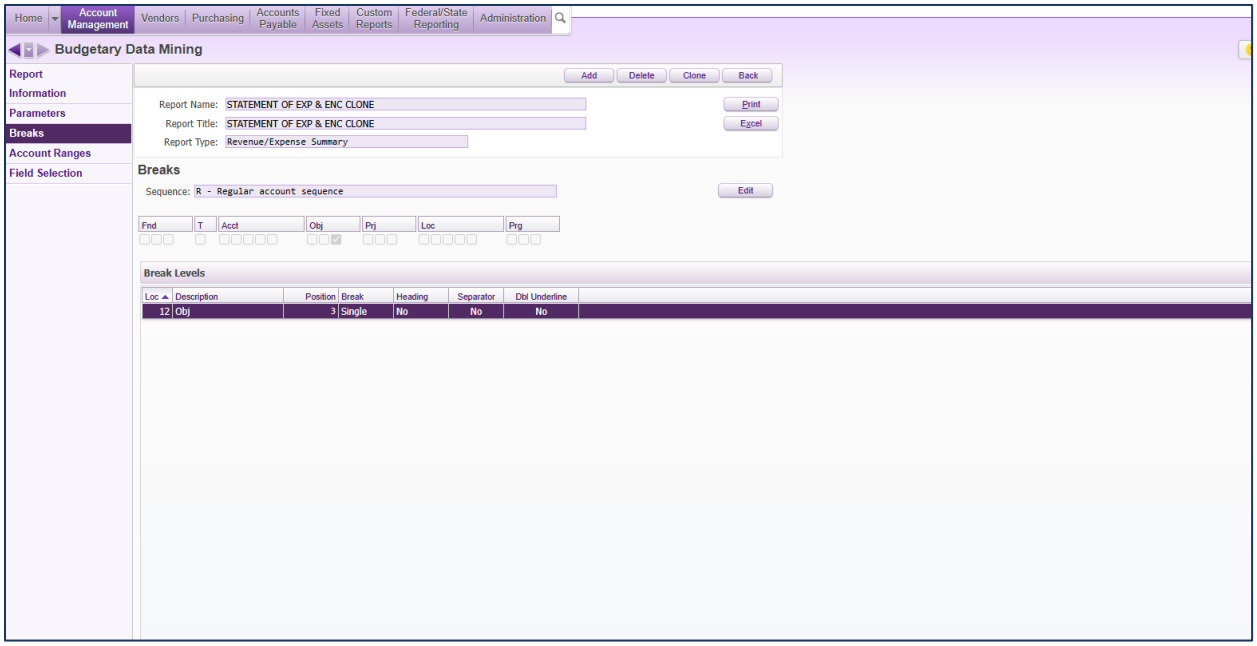


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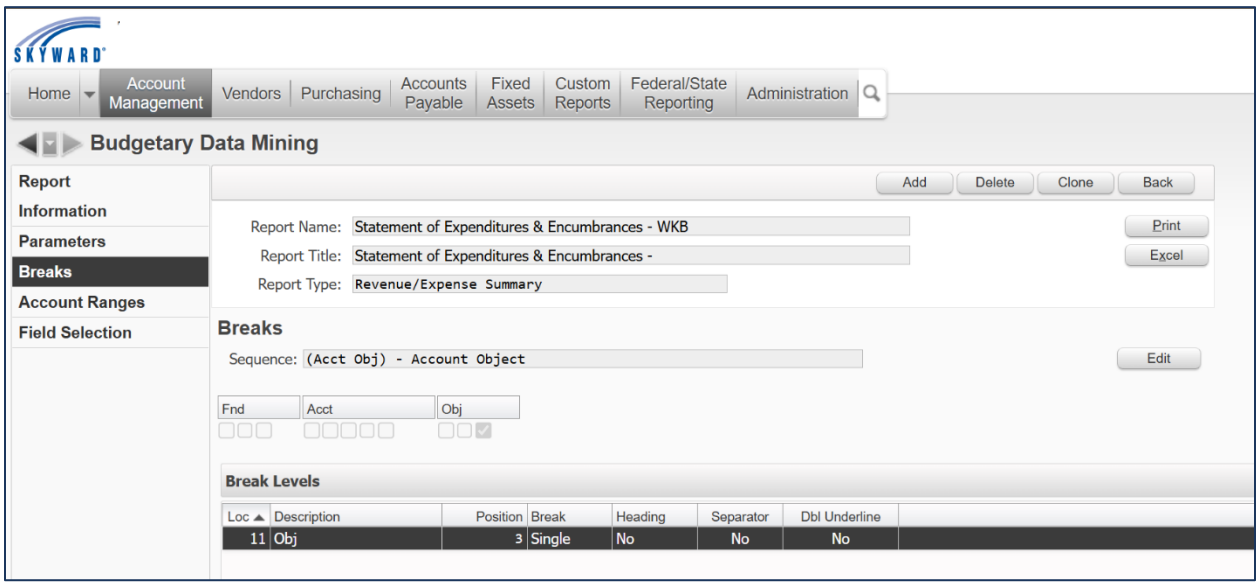
Breaks

1. Click the **Edit** icon.
2. Set the break level to **Object.**
3. Verify that the **third checkbox** under Object is selected.

View 1 Example:



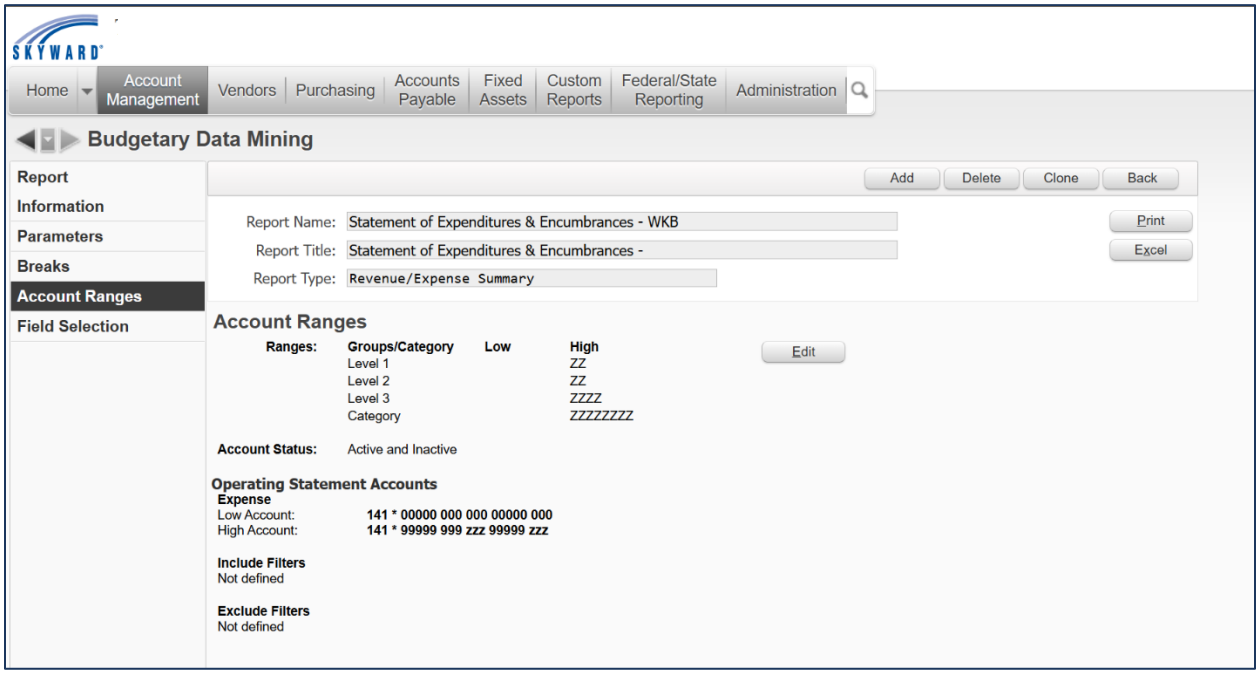
View 2 Example:



Account Ranges

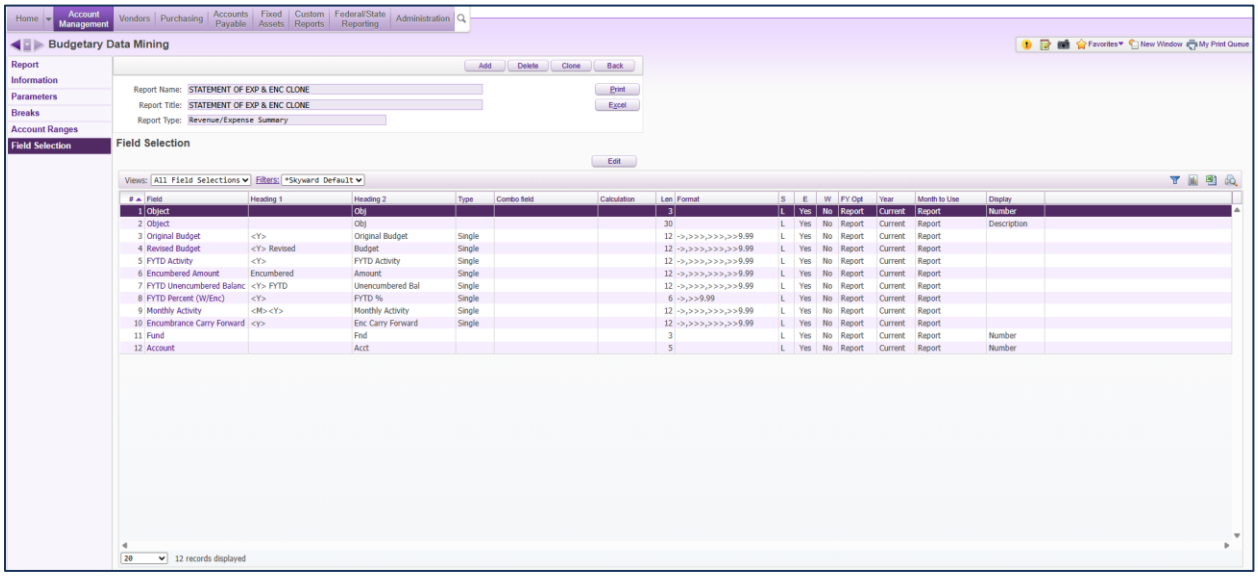
1. Run the report for a single fund or multiple funds.
2. Enter the lowest fund number in the **Low** field (typically Fund 141).
3. Enter the highest fund number you wish to include in the **High** field.

This sample below is set to pull all accounts in Fund 141 only:



Field Selection

1. Click the **Edit** icon to add or remove fields.
2. Select the fields required for the upload process as identified in the report setup



Download the Report

1. Verify that all report settings are correct.
2. Click Excel to download the report.
3. Although the button is labeled "Excel," the file will download as a CSV because of the preference setting.
4. Apply filters to the downloaded file.
5. If multiple funds are included, sort the file by Fund

Convert the Report to the ePlan Upload Template

Use the downloaded Skyward file and copy each column into the appropriate field of the ePlan upload template.

Note: All values must remain on the same row during the copy and transfer process.

Required Fields

	A	B	C	D	E	F	G	H
	District Number	Reporting Year	Report	Account	Expenditure Object	Fund	Sub Fund	Amount
2	721	2026	AFR	71100	116	141		$200,000.00
3								

District Number

- Enter the LEA district number (up to three digits).
- Manually enter the number and copy it down through the last row of data.

Reporting Year

- Enter the fiscal year associated with the funding application.
- Example:
  - FY26 Amended Budget and FY26 FER Actuals = **2026**
  - FY27 Original Budget = **2027**

Report

- **BUD** = Original Budget or Amended Budget
- **AFR** = FER Actuals

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Account

- Copy the Account field from the Skyward Report.
- This is the five-digit account code (for example, 71100 or 71200).

Expenditure Object

- Copy the Object field from the Skyward Report.
- This is the three-digit expenditure object code (for example, 116 or 429).

Fund

- Copy the Fund field from the Skyward Report.
- This is the three-digit fund code (for example, 141 or 143).
- **Fund 142 should be included only for FER Actual uploads and should not be used for budget uploads.**

Sub Fund

- Leave this field blank for State Funds FER uploads.

Amount

- Copy the Amount field from the Skyward Report.
- This should reflect the total amount for each line item.

Data Cleanup

1. Add filters to the ePlan Upload Template first row.
2. Sort the **Amount** column from lowest to highest.
3. Delete all rows where the amount equals **$0**. Delete the entire row, not just the cell contents.
4. Verify that all data remains aligned correctly after copying and sorting.

A	B	C	D	E	F	G	H
District Number	Reporting Year	Report	Account	Expenditure Object	Fund	Sub Fund	Amount
721	2026	AFR	71100	116	141		$200,000.00

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Upload in ePlan

1. Save the completed template as an **Excel Workbook (.xlsx)**.
2. Do **not** upload the original Skyward CSV file.
3. Use the completed ePlan template for the upload process.
4. Follow the separate ePlan upload instructions to complete the submission.

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