

# DBT Rollover from 2019 to 2020

Version 1.0 | May 13, 2019

FY2019 = July 1, 2018 – June 30, 2019

FY2020 = July 1, 2019 – June 30, 2020

## Overview

Once per year, typically at the end of the fiscal year, each organization needs to request that SDCOE Payroll Services performs a Department Budget Table (DBT) rollover in PeopleSoft. This process takes any positions from 2018-19 (labeled 2019) and creates a 2019-20 record (labeled 2020) on the DBT screen in HCM.

In this example, Position 10990604 now has a “2020” record – 2020 represents 2019-20.

**Search Results THE DBT ROLLOVER CREATES A "2020" RECORD FOR EACH POSITION**

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Set ID	Department	Fiscal Year	Budget Level	Position Pool ID	Job Code	Set ID	Job Code	Position Number	Empl ID	Empl Record
09900	000	2020	Position	(blank)	(blank)	(blank)	(blank)	10990604	(blank)	0
09900	000	2019	Position	(blank)	(blank)	(blank)	(blank)	10990604	(blank)	0
09900	000	2018	Position	(blank)	(blank)	(blank)	(blank)	10990604	(blank)	0
09900	000	2017	Position	(blank)	(blank)	(blank)	(blank)	10990604	(blank)	0
09900	000	2016	Position	(blank)	(blank)	(blank)	(blank)	10990604	(blank)	0
09900	000	2015	Position	(blank)	(blank)	(blank)	(blank)	10990604	(blank)	0

## Things to Do Prior to the Rollover

The following items should be considered/addressed before rolling your Department Budget Tables to the next fiscal year (2019 -2020). Waiting to make these changes until after the rollover can cause unwanted and old data to carry over to next fiscal year.

- Know which data will roll.** All active DBTs roll. 2020 DBTs are created with the data from the most current row of the active 2019 DBTs and will all have an Effective Date of 07/01/2019.

**NOTE: Inactive DBTs will be excluded from the roll.**

- Clean up Departments.** Prior to the roll, plan out desired department changes on positions. Once you have confirmed what department the position is going from and to, follow the steps below to update the department correctly:

1. Decide what Effective Date you will use for the Department Change. Be sure to use Effective Dates in the current fiscal year so that the new DBTs are rolled. (In this example, Effective Date of 06/01/2019).
2. Inactivate the old DBT. Use an Effective Date of one day prior to the Department Change you plan to make. (In this example, Effective Date of 05/31/2019).
3. Change the Department on Position (In this example, Effective Date of 06/01/2019)
4. Verify that Job Data reflects the new Department.
5. Create the new DBT (In this example, Effective Date of 06/01/2019).

When your DBTs roll, the new DBTs with the updated departments will roll rather than the old (inactive) DBTs

**IMPORTANT! STEP 2 IS CRITICAL TO ENSURE THAT ONLY THE CURRENT (Active) DBTs ROLL.**

- Decide when to roll.** Consider when would be best to run the rollover process. Rolling DBTs too soon can create added work for your organization because after your DBTs are rolled, you'll need to update *both* the 2019 and 2020 DBTs with your changes until next fiscal year.
- Create new positions but be aware of how they are impacted by the rollover.** New Positions for next fiscal year can be created at any time but hold off on creating 2020 DBTs until after your district's DBTs are rolled.  
**NOTE:** If you create a position with a future Effective Date the DBT screen will consider that position as invalid until its Effective Date. You'll have to hold off creating the DBT until the Effective Date of the position is current or past.
- Do not create DBTs for FY 2020.** Hold off on creating any 2020 DBTs until after the rollover process is run for your district. ***If 2020 DBTs are created prior to the rollover of 2019 DBTs, they will be overwritten.***
- Clean up DBTs.** Update sequence numbers and remove MCOPs as they are not expensed separate from regular earnings.

### Things to Do After the Rollover

- If you need to enter or update a position's DBT, update BOTH the 2019 and 2020 DBTs with your changes.** This ensures that the 2020 DBT data continues to mirror the 2019 DBT data.
  - If you need to enter or update a position's DBT for 2018-19 only, and not 2019- 20, make sure you only work with the record labeled 2019.
  - If you need to enter or update a position's DBT for 2019-20 only, and not 2018-19, make sure you only work with the record labeled 2020.
- REMEMBER, EFFECTIVE DATES ARE CRITICAL.** When updating DBTs you must be conscious of the dates within each fiscal year and enter them accordingly. If an Effective Date from one fiscal year is entered in the DBT for different fiscal year, the earnings and fringes for the employee in that position will go to suspense.  
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**FY2020 = July 1, 2019 – June 30, 2020 (07/01/2019 – 06/30/2020)**
- M\_KK\_POSIT\_COMBO\_ACCTS\_LIST and other DBT queries will return 2020 data after the rollover.**