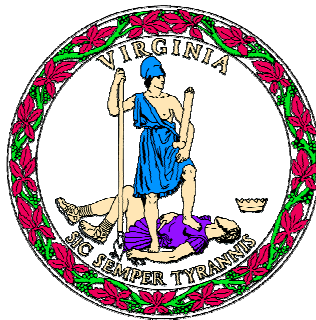


Commonwealth of Virginia



Performance Budgeting System

Decision Package Module Instructions

Contents

Decision Packages Overview	2
Quick Guide – Agency Analyst	3
Quick Guide – Agency Analyst	3
Overview Tab.....	5
Budget Summary Tab.....	9
Narratives Tab	10
NGF Revenue Source Tab	12
Budget Detail Tab	13
Position Planning Tab.....	14
Rate Adjustment Tab	18
Allocation to Components.....	19

Decision Packages Overview

A decision package is a proposal to modify your agency's budget or to modify language in the Appropriation Act.

Each decision package should cost out and justify one budget action. The action proposed in each decision package should be a discrete unit that can be evaluated on its own merit, independently of any other proposals. Under certain circumstances, several strategies or actions may be tightly related and cannot be viewed independently. If so, they may be grouped together in one decision package.

Your agency should submit a decision package for:

- Any action that your agency proposes to take that reflects a net savings of dollars or positions, or that reflects a net cost in dollars or increase in positions;
- Any action that your agency proposes that has a significant policy or budgetary impact;
- Any action that impacts achievement of performance targets relating to objectives/measures;
- Proposed changes to language to the Appropriation Act that has a policy impact; or
- Any budgetary impact associated with legislative proposals.

Quick Guide – Agency Analyst

Agency Analyst

1. Mouse over the Operating Budget functional area menu item and then mouse over Decision Packages. From the resulting dropdown menu, select Decision Packages and the Overview tab will appear.
2. Complete the Overview tab as described in the Overview tab instructions.
3. Complete the Narratives tab as described in the Narratives tab instructions.
4. Complete the NGF Revenue Source tab as described in the NGF Revenue Source tab instructions. This tab only needs to be completed if there is an NGF Revenue impact for the decision package.
5. Complete the Position Planning tab as described in the Position Planning tab instructions. This tab only needs to be completed if positions are requested or impacted by this request, including position reductions.
6. Complete the Budget Detail tab as described in the Budget Detail tab instructions.
7. Complete the Budget Summary tab as described in the Budget Summary tab instructions.
8. Complete the Rate Adjustment tab as described in the Rate Adjustment tab instructions. Only complete this tab if you are a central service agency submitting a request for a rate adjustment.
9. Click Submit and select the appropriate action from the available options.
 - a. Continue Working - Saves the decision package and returns the work item to the Available Work Items tab on the Work Tray for users with similar credentials to claim.
 - b. Submit for Agency Review - Submits the decision package to the next step in the workflow.
 - c. Void Document - Voids the decision package.

Quick Guide – Agency Analyst

Agency Reviewer

NOTE: Ensure that all decision packages have been prioritized in the Decision Package Prioritization module. All decision packages must be prioritized before they can be submitted to DPB.

1. Click on Available to be Claimed from the Work Tray.
2. Select the Document Type filter and select Decision Package to filter on the decision packages.
3. Click Claim next to a decision package that is ready for review. Once decision package is claimed, the Overview tab will appear.
4. Review the Overview tab for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.

5. Click on the Budget Summary tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
6. Click on the Narratives tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
7. Click on the NGF Revenue Source tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
8. Click on the Budget Detail tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
9. Click on the Position Planning tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
10. Click on the Rate Adjustment tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
11. Click Submit and select the appropriate action from the available options.
12. Continue Review - Saves the decision package and returns the work item to the Available Work Items tab on the Work Tray for users with similar credentials to claim.
 - a. Submit for DPB Review - Submits the decision package to DPB. (Must have been ranked in the Decision Package Prioritization module.)
 - b. Return for Further Data Entry - Returns the decision package to the data entry workflow step.
 - c. Void Document - Voids the decision package.

Overview Tab

Overview

The purpose of the **Overview** tab is to describe the decision package and select the level at which the budget details will be entered. Additionally, the ability to specify if new legislation or Appropriation Act language changes and attach a file related to those changes is provided.

The screenshot shows the 'Overview' tab of the Virginia Performance Budgeting System. The interface includes a header with the system name and user role 'Agency Analyst 001'. A navigation bar contains tabs for 'Work Tray', 'Operating Budget', 'Capital Budget', 'Budget Execution', 'Six-Year Plans', 'Narrative', 'Reporting', 'Administration', and 'Logout'. The main content area is titled 'Enter Technical Adjustment' and features several input fields: 'Agency', 'Biennium' (set to 2012-2014), 'Budget Round' (set to Introduced Bill), 'Title', and 'Region'. Below these is a 'Strategic Link' table with columns for 'Objective/Performance Measure', 'GF Percentage', and 'NGF Percentage'. The table currently shows one row with empty values. At the bottom, there is a 'Description' text area. The interface also includes a sidebar with icons for 'Help', 'Print', 'Save', 'Validate', and 'Submit', and a footer with pagination information (Page 1 of 1) and a 'View 1 - 1 of 1' indicator.

Instructions

1. Click on the **Overview** tab.
2. Select the Agency to which the decision package will be applied.
3. Select the Biennium to which the decision package will be applied.
4. Make sure the correct budget round is selected (initial budget, amended, or caboose).
5. Enter the Title for the decision package.

Insert a short descriptive title. Remember that your title should begin with a verb such as increase, add, reduce, transfer, shift, expand, etc.

6. Select the Category for the decision package.
 - a. Select the category that most closely defines the proposed strategy. The following list of categories represents typical request categories; if additional categories are needed they will be conveyed through the DPB transmittal.
 - b. Required Base Adjustments. This category is for the base adjustments communicated to the agencies by DPB.

- c. Technical adjustments. This category is for technical or housekeeping adjustments that do not have an overall net general fund budget impact or do not involve policy decisions, such as to shift funds or positions between programs or service areas or to appropriate additional nongeneral fund revenue (such as a federal grant that is more than originally anticipated or will continue for an additional year).
- d. Emergencies. The request is essential to prevent or eliminate an immediate threat to life, safety, health, or property.
- e. Mandates. The request is necessary to meet the requirements of a state or federal law or a court order. (Note: The definition of mandate is restrictive.) Requirements of state or federal regulations are not considered mandates per se. If a regulation or legislation simply enables or authorizes an activity but does not require it, the activity is not considered a mandate. This category should be used only if there is absolutely no alternative but to fund the request. It is anticipated that very few, if any, requests will fall within this definition.
- f. Unanticipated and unavoidable cost adjustments. This category is for increases or decreases in your agency's budget to reflect cost adjustments involving existing services or for adjustments to the rates charged by central service agencies for services used by other state agencies. (Note: This category is NOT for budget proposals involving a change in the scope of services or the way your agency delivers services or does business.)
- g. Salary increases and regrades. Salary increases and regrades. This category is for salary increases due to position regrade/classification. (Note: This category is NOT for statewide salary increases or for new positions).
- h. Caseload or workload adjustments. This category is for routine changes, either increases or decreases, in your agency's budget to reflect cost adjustments involving changes in workloads or client loads. (Note: This category is NOT for budget proposals involving a change in the scope of services or the way your agency delivers services or does business.)
- i. New general fund spending initiatives. This category is for proposing new general fund spending initiatives that have not received prior approval from the Governor or Cabinet Secretary.
- j. New general fund spending initiatives source of funding. This category is for identification of the source of funding for new general fund spending initiatives that have not received prior approval from the Governor or Cabinet Secretary. This should be a negative number and within your current budget.
- k. Operational efficiencies and service reductions. This category is for cost savings or efficiency measures that your agency proposes to implement or for proposals that produce cost savings by reducing the services or scope of services delivered to your agency's customers. Examples include phasing out or eliminating certain administrative activities or positions, reducing or eliminating discretionary expenses (printing, travel, etc.), or decreasing or eliminating current services.

- l. Reorganizations. This category is for proposals to transfer a program, service, or activity to another government entity (local, state, or federal), or to privatize. This category is for operational or organizational changes that will result in long-term cost-savings or benefits to the Commonwealth such as consolidating organizational units. This category also is for proposals that involve any agency reorganization that produces a need for additional agency resources (either funds or positions), or involves a policy issue. Examples include creating new organizational units or changing functional program units.
 - m. Information technology. This category is for proposals for information technology resources, including hardware, software (whether commercial packages or custom-developed), telecommunications equipment or services, and any related consulting, training, or support/maintenance services.
 - n. VITA rate change requests. This category is for requests for funding required by any change in VITA rates charged to agencies.
 - o. Other spending or initiatives. This category is for any other proposals for additional resources that will require new or expanded services.
 - p. Position level changes only. This category is for technical changes (increases or decreases) to position levels that have no other impact on appropriated amounts.
 - q. Appropriation Act language only. This category is for proposals to add, delete, or modify language in the Appropriation Act. Proposals in this category should have no impact on the appropriation amounts.
7. Select a link for the decision package to an agency Objective/Measure in the **Strategic Link** grid. Additionally, apply a general fund percentage and nongeneral fund percentage and description of the link.
8. Agencies may link a decision package to either a measure(s) or an objective, not both. If you opt to link to a measure or measures, then you should not also link to that objective. The percentages you apply to each measure would, when added up, effectively equal the objective total. Numbers must add up to a 100 percent. Objectives/measures are from agency submissions in Virginia Performs.
9. Add rows to the **Strategic Link** grid as needed to specify objective/measure lines by using the button shown below.
10. Select the **Region** of the state that the decision package most impacts. If it impacts more than one region, select "Multiple Regions".
11. If applicable, select the statewide **Enterprise Strategy** that the decision package supports. It is not necessary to force a selection if the decision package does not clearly support any of the strategies listed.
12. Enter the Agency Description for the decision package.

Summarize the actions your agency proposes to take with the requested dollars or positions. If the decision package is for language only, explain what the language will allow the agency to do. In addition, provide detailed information to indicate the need for the proposed service. For example, is there a waiting list for

services? If so, how long is the wait, how many individuals are on the list, what is the average wait time to receive services? Have demographics, weather, or other factors changed the need for the service? Cite quantitative data wherever possible. Make sure to explain why the request is inherently governmental.

13. Check **Will new legislation be required as a result of this request?** if new legislation is required as a result of the decision package.
14. Check **Is Appropriation Act Language required as part of this request?** if Appropriation Act language is required for the decision package.
15. Upload any supporting documentation for the decision package by clicking Browse, selecting the file to be uploaded, and clicking the Upload button.

Note: This will be required if either the check box about new legislation or new Appropriation Act Language is checked. Changes will be shown using the appropriate italics or strike-through.

16. Check **Show Cost Code and/or Show Project Code** if the budget details for the decision package will be entered at the cost code level, operating project code level, or both.

Budget Summary Tab

Overview

The purpose of the **Budget Summary** tab is to capture the high level general fund (GF) and nongeneral fund (NGF) six-year budget impact for the decision package. The information on this tab can be entered before the **Budget Detail** tab is completed as a placeholder if an agency is unsure if they are going to submit a decision package to DPB. If the **Total Services** grid on the **Budget Detail** tab has already been entered, the Summarize Budget functionality can be used to populate the first two years of the **Summary of Costs and Positions** grid based upon the data entered in the **Total Services** grid.

Virginia.gov Agency Analyst 001

Performance Budgeting System UAT
Commonwealth of Virginia

Work Tray | Operating Budget | Capital Budget | Budget Execution | Six-Year Plans | Narrative | Reporting | Administration | Logout

Enter Decision Package

Overview | **Budget Summary** | Narratives | NGF Revenue Source | Budget Detail

Position Planning | Rate Adjustment | Allocation to Components | Validation

Agency: Biennium: 2012-2014 Budget Round: Introduced Bill

Title: Category: -- Please Select --

	Object Type	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018	One-Time
1	GF Dollars							<input type="checkbox"/>
2	NGF Dollars							<input type="checkbox"/>
3	GF Positions							<input type="checkbox"/>
4	NGF Positions							<input type="checkbox"/>
5	GF Transfer							<input type="checkbox"/>
6	GF Revenue							<input type="checkbox"/>
7	Layoffs							<input type="checkbox"/>

Import Export Refresh Page 1 of 1 View 1 - 7 of 7

Summarize Budget

Instructions

1. Click on the **Budget Summary** tab.
2. If the data has already been entered in the **Total Services** grid on the **Budget Detail** tab, click Summarize Budget. This will populate the GF and NGF data for the first two years in the **Summary of Costs and Positions** grid based upon the data entered in the **Total Services** grid on the **Budget Detail** tab.
3. Enter the out-year impact for the decision package in the **Summary of Costs and Positions** grid and, if entering Budget Summary first, enter data for the two years of the biennium for which work is currently being completed. Agencies must enter data for all six years, even if the amount is zero.
4. If the decision package results in a change in general fund resources/revenue, enter the amount in the applicable row at the bottom of the summary grid. "GF Transfer" is for nongeneral fund cash transfers to the general fund, "GF Revenue" is for changes in general fund revenue coming in to the

New!

New!

- Commonwealth, and "Additions to Balance" is for the reversion of general fund balances from agencies to the General Fund.
- The **Resource Item** field above the summary grid is intended only for decision packages that impact general fund resources/revenue. If the decision package impacts general fund resources/revenue, select the resource category from the **Resource Item** field. If the decision package does not involve general fund resources/revenue, leave this field blank.

Narratives Tab

Overview

The purpose of the **Narratives** tab is to capture the justification for the decision package, including justification for any rate adjustments. Remember, quality is important! Decision-makers may have only your narrative as a basis for evaluating your agency's proposal. You will need to be as thorough as possible to explain what the proposal involves and why it should be funded.

The screenshot shows the 'Narratives' tab in the 'Performance Budgeting System' UAT. The interface includes a navigation bar with tabs like 'Work Tray', 'Operating Budget', 'Capital Budget', 'Budget Execution', 'Six-Year Plans', 'Narrative', 'Reporting', 'Administration', and 'Logout'. The 'Narrative' tab is active. Below the navigation bar, there's a section titled 'Enter Decision Package' with sub-tabs: 'Overview', 'Budget Summary', 'Narratives' (selected), 'NGF Revenue Source', and 'Budget Detail'. Under 'Narratives', there are further sub-tabs: 'Position Planning', 'Rate Adjustment', 'Allocation to Components', and 'Validation'. The main form area contains fields for 'Agency', 'Biennium' (set to 2012-2014), 'Budget Round' (set to Introduced Bill), 'Title', and 'Category' (set to -- Please Select --). Below these fields are two large text areas: 'Consequences of not funding/Justification' and 'Alternatives considered (must list at least one)'. On the right side of the form, there are icons for 'Help', 'Print', 'Save', 'Validate', and 'Submit'.

Instructions

- Click on the **Narratives** tab.
- Enter the Consequences of not funding/justification.

Indicate the consequences you expect if your proposal is not approved. Detail how not funding this action will impact the agency's performance measures and targets.

3. Enter the Alternatives considered (must list at least one).

Indicate any other alternatives you considered for accomplishing the objectives of the request and why you selected the proposed action. Briefly list the pros and cons of each alternative.

4. Enter the Explanations and Methodologies.

Explain how you calculated your request and any assumptions used, the methodology used. Enter as much detail as necessary to fully explain the methodologies used.

5. Attach any Supporting Documentation to further justify the need for the decision package.

NGF Revenue Source Tab

Overview

The purpose of the **NGF Revenue Source** tab is to capture a six-year estimate of any NGF Revenues that will be generated from the decision package is approved. The revenue estimate should include any nongeneral fund revenue that the agency will collect, receive from another agency, or send to another agency based upon the implementation of the decision package. This tab should only be completed if there is a nongeneral fund request/impact. This is over and above amounts in the six-year nongeneral revenue fund estimates module.

The screenshot displays the 'Performance Budgeting System' interface for the Commonwealth of Virginia. The 'NGF Revenue Source' tab is selected under the 'Enter Decision Package' section. The interface includes a navigation bar with tabs like 'Overview', 'Budget Summary', 'Narratives', 'NGF Revenue Source', and 'Budget Detail'. Below the navigation bar, there are input fields for 'Agency', 'Biennium' (set to 2012-2014), 'Budget Round' (set to Introduced Bill), 'Title', and 'Category'. The main area features the 'NGF Revenue Estimate' grid with columns for Fund, Revenue Source, Revenue Action, Agency, and fiscal years (FY 2013 Dollars, FY 2014 Dollars, FY 2015 Dollars). A table with one row is visible. The bottom of the screen shows a status bar with 'Page 1 of 1' and 'View 1 - 1 of 1'.

Instructions

1. Click on the **NGF Revenue Source** tab
2. In the **NGF Revenue Estimate** grid, enter the fund and revenue source code associated with the nongeneral fund revenue.
3. In the **NGF Revenue Estimate** grid, select the Revenue Action (send to or receive from) and Agency (pass through or may be blank) associated with that action if applicable.
4. In the **NGF Revenue Estimate** grid, enter an nongeneral fund revenue estimate for six years in the columns labeled with the out-years, FY 20XX Dollars.
5. In the **NGF Revenue Estimate** grid, click on the Methodology cell for revenue source that is currently being estimated. In the popup window that appears, enter the methodology used to make the estimate.

Institutions of higher education should explain the impact on student tuition and fees of any requests for nongeneral fund dollars.

6. Add rows to the **NGF Revenue Estimate** grid as needed to specify multiple nongeneral revenue sources for the decision package by using the button shown below.

Budget Detail Tab

Overview

The purpose of the **Budget Detail** tab is to capture the budget details, line by line, for the decision package. A user will be required to enter the program, fund, subobject, and FY 20XX and 20XX dollars for each budget line associated with the decision package. If a user specifies that they will be budgeting at the cost code and/or project code levels, then they will be allowed to enter this level of detail when entering the budget details. Additionally, the **Position Planning** tab must be used to budget for any position increases or decreases associated with the decision package.

The screenshot displays the 'Budget Detail' tab within the Virginia Performance Budgeting System. The top navigation bar includes links for Work Tray, Operating Budget, Capital Budget, Budget Execution, Six-Year Plans, Narrative, Reporting, Administration, and Logout. The 'Enter Decision Package' section contains input fields for Agency, Title, Biennium (set to 2012-2014), and Budget Round (set to Introduced Bill). Below this, the 'Total Services' grid is shown with columns for Program, Fund, Subobject, FY 2013 Dollars, FY 2014 Dollars, and One-time Funding?. The grid currently shows a single row with empty input fields for each column.

Instructions

1. Click on the **Budget Detail** tab.
2. Confirm the personal services data that populated the **Total Services** grid from the **Position Planning** tab is correct. If the data is incorrect, return to the **Position Planning** tab to make corrections and then repopulate the data as described in the **Position Planning** tab instructions.
3. In the **Total Services** grid, enter the Program (program, service area and component), Fund, and Subobject for each nonpersonal services budget line.

Additionally, if applicable for the budget line, enter the Cost Code and/or Project Code.

4. Enter the FY 20XX Dollars for the budget line.
5. In the **Total Services** grid, if the budget line specified is one-time funding, then check the One-time Funding checkbox. If a budget line contains a mix of one-time and ongoing funding, create a separate line for the one-time amount and another for the ongoing funding requirements.
6. Add rows to the **Total Services** grid as needed to specify multiple nonpersonal services budget lines by using the button.

Position Planning Tab

Overview

The purpose of the **Position Planning** tab is to capture position changes associated with the decision package. Once the positions are entered, the personal services budget can be automatically calculated and the resulting budget data can be used to populate the personal services subobjects in the **Total Services** grid on the **Budget Detail** tab.

New! The position planning tab allows you to enter authorized position and salary information by either position and role which will in turn allow you to calculate the overall cost of new positions to include compensation and benefits. Alternatively, you may enter just the authorized position information by selecting the "Not Budgeting by Role or Position" option.

Instructions

Position Planning by Role

1. Click on the **Position Planning** tab.

2. Select the **Budget By Role** radio button.
3. In the **Position Planning** grid, enter the program, fund and subobject for the role. Additionally, if applicable for the role, enter the Cost Code and/or Project Code.
4. In the **Position Planning** grid, select the Role.

Enter the proper role title for the position you are requesting. Please consult the Department of Human Resource Management (DHRM), the DHRM website, or your agency human resource department for this proper role title.

5. In the **Position Planning** grid, enter the Salary for the selected role.

Enter the projected annual base salary for the position being requested. Do not include any benefit amounts. The requested amount must be within salary range and should be based on starting salaries for recent hires in this role.

6. In the **Position Planning** grid, select the Health Insurance for the role.

Select a health premium. You can select the statewide average, or the actual employers? premium for single, employee plus one, and family coverage.

7. In the **Position Planning** grid, select the Retirement for the role.

Select the retirement type for the position: regular VRS, VaLORS, SPORS, judges? retirement, or defined contribution.

8. In the **Position Planning** grid, enter the number of pay periods for the role for the first year of the biennium in the FY 20XX Pay Periods cell if the role is valid for the first year of the biennium.

No more than 22 pay periods should be used for each new position in the first year the position will be filled. If the new position begins in the second year of the biennium, enter a ""0"" in the first year.

9. In the **Position Planning** grid, if the role is valid for the first year of the biennium, enter the number of positions allocated to the specified role for the first year of the biennium in the FY 20XX Positions cell.
10. In the **Position Planning** grid, enter/select the FY 20XX Pay Periods, FY 20XX Positions, and the FY 20XX Percentage where 20XX is the second year of the biennium. Data will only be entered for the second year of the biennium if the role is valid for the second year of the biennium, you should enter a ""0"" for the first year.
11. Add rows to the **Position Planning** grid as needed to specify multiple programs, roles, or percentage allocations of existing roles, using the button shown below.

12. Once all roles have been added to the **Position Planning** grid, click the Calculate button to calculate the budget for both years of the biennium for the specified roles. This calculation is based upon the data entered for each role.
13. Confirm the calculation of the budget for both the first and second years of the biennium FY 20XX Budget. If the amounts are not correct, edit the values entered for a role and recalculate the budget for that role.
14. Once the budget for both years of the biennium for each role is satisfactory, click the Populate Total Services button to calculate the personal services budget for the **Budget Details** tab based upon the data entered in the **Position Planning** grid.

Position Planning by Position

1. Click on the **Position Planning** tab.
2. Select the **Budget By Position** radio button.
3. In the **Position Planning** grid, enter the Program, Fund, and Subobject for the role. Additionally, if applicable for the position, enter the Cost Code and/or Project Code.
4. In the **Position Planning** grid, enter the Position Title.

Enter the proper position title for the position you are requesting. Please consult the Department of Human Resource Management (DHRM), the DHRM website, or your agency human resource department for this proper title.

5. In the **Position Planning** grid, enter the Salary for the selected position.

Enter the projected annual base salary for the position being requested. Do not include any benefit amounts. The requested amount must be within salary range and should be based on starting salaries for recent hires in this position.

6. In the **Position Planning** grid, select the Health Insurance for the position.

Select a health premium. You can select the statewide average, or the actual employers?premium for single, employee plus one, and family coverage.

7. In the **Position Planning** grid, select the Retirement for the position.

Select the retirement type for the position: regular VRS, VaLORS, SPORS, judges? retirement, or defined contribution.

8. In the **Position Planning** grid, enter the number of pay periods for the position for the first year of the biennium in the FY 20XX Pay Periods cell if the position is valid for the first year of the biennium.

No more than 22 pay periods should be used for each new position in the first year the position will be filled. If the new position begins in the second year of the biennium, enter a ""0"" in the first year.

9. In the **Position Planning** grid, enter the number of positions allocated to the specified position for the first year of the biennium in the FY 20XX Positions cell if the position is valid for the first year of the biennium. If the position is not valid for the first year of the biennium, enter a "0" in the cell.
10. In the **Position Planning** grid, enter/select the FY 20XX Pay Periods, FY 20XX Positions, and the FY 20XX Percentage, where 20XX is the second year of the biennium. Data will only be entered for the second year of the biennium if the position is valid for the second year of the biennium.
11. Add rows to the **Position Planning** grid as needed to specify multiple programs, positions, or percentage allocations of existing positions, by using the button shown below.
12. Once all roles have been added to the **Position Planning** grid, click the Calculate button to calculate the budget for both years of the biennium for the specified positions. This calculation is based upon the data entered for each.
13. Confirm the calculation of the budget for both the first and second years of the biennium FY 20XX Budget. If the amounts are not correct, edit the values entered for one or more positions and recalculate the budget for that those positions by repeating step 12.
14. Once the budget for both years of the biennium for each position is satisfactory, click the Populate Total Services button to calculate the Personal Services budget for the **Budget Details** tab based upon the data entered in the **Position Planning** grid.

Position Planning for Authorized Positions Only

New!

1. Click on the **Position Planning** tab.
2. Select the **Not Budgeting By Role or Position** radio button.
3. The grid will change to hide the role, position, salary, benefits, and pay period columns.
4. Enter the Program, Fund, and authorized position amount changes requested for the decision package.
5. Choosing the **Not Budgeting By Role or Position** option will allow you to record only authorized position data. It will not calculate the cost of new positions for the Total Services grid on the Budget Detail tab. If there are costs associated with the positions in the decision package, it is recommended that you use either the **Budget by Role** or **Budget By Position** options, otherwise the cost of any new positions will need to be calculated manually and entered into the Total Services grid.

Rate Adjustment Tab

Overview

The purpose of the **Rate Adjustment** tab is only for central service agencies that anticipate a change in their assessed rates for internal service fund services they provide to other state government agencies. A spreadsheet showing the impact of the proposed rate change, by agency, must be attached.

The screenshot displays the Virginia Performance Budgeting System (UAT) interface. At the top, there is a header with the Virginia.gov logo, the title 'Performance Budgeting System Commonwealth of Virginia', and the user 'Agency Analyst 001'. Below the header is a navigation bar with tabs: Work Tray, Operating Budget, Capital Budget, Budget Execution, Six-Year Plans, Narrative, Reporting, Administration, and Logout. The 'Rate Adjustment' tab is selected. The main area is titled 'Enter Decision Package' and contains several input fields: Agency, Title, Biennium (2012-2014), Budget Round (Introduced Bill), and Category (-- Please Select --). Below these fields is a table titled 'Rate Adjustment' with columns: Rate Name, Current Rate, Current Unit, Current Number of Units, Current Date Implemented, Proposed Rate, and Proposed Unit. The table has one row with a data entry icon. At the bottom, there is a footer with 'Page 1 of 1' and 'View 1 of 1'.

Instructions

1. Click on the **Rate Adjustment** tab.
2. In the **Rate Adjustment** grid, enter a Rate Name for rate that will be adjusted.

Enter the official name/title of the rate as it is commonly known.

3. In the **Rate Adjustment** grid, enter the Current Rate, Current Unit, Current Number of Units, and the most Current Date Implemented for the rate that will be adjusted.
4. In the **Rate Adjustment** grid, enter the Proposed Rate, Proposed Unit, Proposed Number of Units, and the Proposed Effective Date for the rate that will be adjusted.
5. Enter the FY 20XX Revenue Impact for the rate that will be adjusted, where XX is the first and second years of the biennium and the four out-years.
6. Enter the Rationale for Rate Change for the rate that will be adjusted. Associated/required narrative fields can be found on the narratives tab.

Describe the anticipated results or objectives your agency expects to accomplish if the proposed rate adjustment is approved.

Allocation to Components

Overview

The purpose of the **Allocation to Components** tab is to capture the budget details for each budgetary component by program and fund/fund detail.

Instructions

1. Click on the **Allocation to Components** tab.
2. Click on the "update" button. This will populate the **Allocation to Components** tab with your budget by program and fund/fund detail as allocated in the base budget total services grid. These lines will appear in the shaded grey rows. The balance to be allocated by component will be in the shaded yellow rows.
3. Click on the balance row where you would like to add a new row, and click "Add." In order to select the balance row properly, click the program field in the balance row.
4. Allocate each program and fund combination across the agency components by entering program, fund, and component information in the newly added row(s).
5. Keep adding rows until your budget is fully allocated by component.
6. Click the "update" button to check the balance remaining to be allocated. A green shaded row indicates that your budget is fully allocated and the totals in the balance row should be zero.
7. Components can also be imported into the grid. The best method for this is to export the grid after you have clicked "update." Add component records in the

Excel file using the proper ID numbers, and re-import the data set. After you re-import you will need to click "update" again.