

# Instructions for the Submission of Non-Technical Decision Packages

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**2020-2022 Biennial Budget / 2020 Session**



**Department of Planning and Budget**

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# Decision Package Overview

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## About the Decision Package Submission

This package provides guidance and instructions for the submission of non-technical decision packages for the 2020-2022 biennium or any 2020 caboose budget requests. This submission is due to DPB by **September 20, 2018**.

To complete the submission, you will be using the following modules in the Performance Budgeting System: 1) Decision Packages, 2) Decision Package Prioritization, and 3) Decision Package Bulk Submit to DPB. These modules can be found on the “Operating Budget” menu on the Performance Budgeting system work tray/main screen.

Detailed instructions on the use of the Performance Budgeting system modules are included later in this package under the section titled “Decision Package Module Detailed Instructions – Performance Budgeting System”. However, this package also highlights key topics such as technical adjustments, non-technical adjustments, information technology submissions, personal services, non-personal services, nongeneral fund revenue sources, rate adjustments, and available reports.

Also included are instructions for the “bulk” submission of your decision packages. The bulk submission functionality is optional and allows agencies with multiple information technology related decision packages to submit them all to DPB at once.

## Non-Technical Decision Packages Defined

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A non-technical decision package is a proposal to modify your agency's budget or to modify language in the Appropriation Act that results in a new initiative, a change or clarification in policy, or a significant budgetary impact. Each decision package should address one budget action only. Each action should be a discrete unit that can be evaluated on its own merit independent of any other proposals. If you have a request that should be categorized as a technical adjustment (a proposal that does not involve changes in policy or significant budgetary impact) at this time and missed the deadline for technical submissions, contact your DPB budget analyst for guidance. Otherwise, all requests for this submission should be submitted as a non-technical decision package.

# Personal Services

## Benefit Rates

If any of your technical adjustment decision packages involve personal services, you should use the rates included in the table below as applicable.

<i>Sub Object</i>	<i>Benefit</i>	<i>2020-22 Budget Development Rates/Factors<sup>1</sup></i>
<b>1111</b>	<b>VRS Retirement Contributions</b>	
	State Employees	13.52%
	Virginia Law Officers Retirement (VaLORS)	21.61%
	State Police (SPORS)	24.88%
	Judges (JRS)	34.39%
<b>1112</b>	<b>Social Security <sup>2</sup></b>	6.20% <b>capped</b> at \$132,900
<b>1112</b>	<b>Medicare</b>	1.45%
<b>1114</b>	<b>Group Life</b>	1.31%
<b>1115</b>	<b>Annual Employer Health Insurance Premiums</b>	
	<b>COVA Care</b> Single	\$8,244
	Employee + One	\$14,748
	Family	\$21,624
	<b>COVA High Deductible</b> Single	\$7,008
	Employee + One	\$13,032
	Family	\$19,044
	<b>HealthAware</b> Single	\$8,124
	Employee + One	\$14,748
	Family	\$21,624
	<b>Kaiser Permanente</b> Single	\$7,008
	Employee + One	\$12,420
	Family	\$18,156
	<b>Optima Health Vantage</b> Single	\$8,220
	Employee + One	\$14,760
	Family	\$21,420
<b>1116</b>	<b>Retiree Health Insurance Credit Premium</b>	1.17%
<b>1117</b>	<b>VSDP &amp; Long-Term Disability Insurance</b>	0.62%
<b>1118</b>	<b>Teachers Insurance and Annuity<sup>3</sup> Plan 1</b>	10.40%
<b>1118</b>	<b>Teachers Insurance and Annuity<sup>3</sup> Plan 2</b>	8.50%
<b>1119</b>	<b>Defined Contribution Plan<sup>4</sup></b>	10.40%
<b>1138</b>	<b>Deferred Compensation Match Payments</b>	One-half of employee's contribution per pay period, up to a max of \$20 per pay period or \$480 annually

## Notes on Benefit Rates

<sup>1</sup> Percentages refer to percent of salaries. Health insurance premiums are the annual employer dollar cost for an individual.

<sup>2</sup> The Social Security cap applies to calendar year 2019. Future year caps are unknown at this time.

<sup>3</sup> For institutions of higher education: Teachers Insurance and Annuity (subobject 1118) includes alternative retirement options, such as TIAA-CREF, for those employees as defined in § 51.1-126 of the Code of Virginia. Plan 1 employees are those employees hired before 7/1/2010. Plan 2 employees were hired after 6/30/2010.

<sup>4</sup> Subobject 1119, is used for employees eligible for a defined contribution plan established pursuant to § 51.1-126.5 of the Code of Virginia.

## Calculating the Cost of Personal Services

While the position planning grid within the Performance Budgeting system is capable of calculating the cost of personal services, it is not recommended that you use this functionality in your technical adjustment decision package submission. The PB system is designed to use one set of rates at a time and since this year the base budget module is also being used at the same time as the base adjustment and decision package modules, the rates being used by the Position Planning grid are more appropriate for base budget development.

Instead, it is recommended that personal services cost for this submission be calculated outside of the PB system. A position calculator has been posted on the DPB website in the same place where you downloaded these instructions. This position calculator is a Microsoft Access database that will assist you with calculating personal services costs and will also help you create a file that can be uploaded into the PB system. Instructions for using this calculator and importing the resulting data into the PB system have also been posted on the DPB website.

## Requests for Salary Increases

For requests involving additional funds for employee salaries, agencies should address the extent to which current salaries are recruiting, retaining, and motivating employees; how total compensation compares to what is offered by other relevant employers for similar positions; and the impact on the agency's ability to provide services and recruit, retain, and motivate employees. If you have any such requests you should include this explanation in the "Explanations and Methodologies" field on the "Narratives" tab of the decision package module.

# Nonpersonal Services

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For nonpersonal services, you should array any applicable changes by major object of expenditure unless a more detailed subobject detail is desired or is required to fully explain the request. You should use the allowable nonpersonal convenience subobject codes listed in the table below if you are arraying these amounts by major object. **No other budgetary convenience subobject codes should be used.**

If you choose to array nonpersonal services to a lower level of detail, you may refer to the complete subobject code listing available at the following link:

[http://publicreports.dpb.virginia.gov/rdPage.aspx?rdReport=COA\\_SubObject](http://publicreports.dpb.virginia.gov/rdPage.aspx?rdReport=COA_SubObject).

## Allowable Nonpersonal Services Convenience Codes

1295	Undistributed Contractual Services	2195	Undistributed Property and Improvements
1395	Undistributed Supplies and Materials	2295	Undistributed Equipment
1495	Undistributed Transfer Payments	2395	Undistributed Plant and Equipment
1595	Undistributed Continuous Charges	3195	Undistributed Obligations

# Nongeneral Fund Revenue Source

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If you are requesting a decision package for nongeneral fund appropriation that will require the collection of new or additional revenue above and beyond the base level of revenue included in your nongeneral fund revenue estimate, you should complete the NGF Revenue Source tab in the decision package module. If you are requesting nongeneral fund appropriation that can be supported by existing revenue collections, you can skip this tab.

For details on completing this tab, see the Performance Budgeting System instructions included later in these instructions.

Note: You will receive separate instructions on submitting updates to your agency's overall nongeneral fund revenue estimates to be based on existing revenue collections.

# Rate Adjustments

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If you are a central service agency that provides services to other agencies and charges rates for these services, you will need to complete the Rate Adjustment tab in the decision package module if you anticipate a change in those rates. You should also explain as in much detail as possible, the need for the rate adjustment and attach a spreadsheet showing the impact by agency in the Narrative tab.

For details on completing the Rate Adjustment tab, see the Performance Budgeting System instructions included later in these instructions.

# Reports

You may run a report of your decision package submissions by clicking on the “[BD 1.17 -Agency Budget Requests](#)” report link within the Performance Budgeting system reports menu. This report contains several options that allow you to run detailed reports on requested dollar amounts and authorized positions. There are options that allow the viewing of information in a summarized form and the creation of a formatted, more detail report. When the report is opened, it defaults to the following filter:

The screenshot shows the 'Agency Budget Requests' report filter interface. At the top, there is a title bar with 'Agency Budget Requests' in the center, 'Hide Filter | Help' on the left, and 'View Bookmarks | Save Bookmark' on the right. Below the title bar, there are five main filter sections: 'Biennium' (set to '2020-2022'), 'Budget Round' (set to 'Initial Bill'), 'Secretarial Areas' (radio button selected, with a list including 'Administration', 'Agriculture and Forestry', 'Central Appropriations', 'Commerce and Trade', 'Education', and 'Executive Offices'), 'Agencies' (a list including '100: Senate of Virginia', '101: House of Delegates', '102: Legislative Department Reversion Clearing', '103: Magistrate System', '104: Judicial Department Reversion Clearing', and '105: Virginia Commission on Intergovernmental Relations'), and 'Request Type Group' (set to 'Decision Packages'). To the right of these is a 'Workflow Step' section with a list including 'Draft', 'Agency Review', 'Ready for DPB Submission', 'DPB Review', and 'Parked for Completion'. Below these sections is a 'Custom Title' field containing 'Agency Budget Requests'. Underneath is a 'Select an Output Option' section with checkboxes for 'Formatted', 'Summary Analysis Grid' (checked), 'Aggregate Dollars', 'Dollar Details Analysis Grid', 'Aggregate Positions', and 'Positions Details Analysis Grid'. Below this is a 'More Filters' link. Under 'More Filters' is an 'Agency Decision Package Category' section with a list including '\*' (selected), 'Appropriation Act language only', 'Budget reductions', 'Caseload or workload adjustments', and 'Discretionary Reappropriation'. At the bottom left is a 'Submit' button.

You may filter out Technical Adjustments and Information Technology requests that were part of a separate submission by selecting all items in the “Agency Decision Package Category” except those two categories. In order to open the “Agency Decision Package Category” filter, click the “More Filters” link.



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# Decision Package Module Instructions - Performance Budgeting System

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The decision package module is used for proposals to modify your agency's budget or to modify language in the Appropriation Act. These proposals will be in the form of either technical or non-technical adjustments.

Each decision package in this submission should address and justify one IT-related budget action only. The action proposed in each decision package should be a discrete unit that can be evaluated on its own merit, independent 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.

To access the decision package module, select "Decision Packages" within the "Decision Package sub-menu under the "Operating Budget" link on the Performance Budgeting System work tray / main screen. Detail instructions below will explain how to create an IT decision package.

If you have any questions of a policy nature, please contact your DPB budget analyst. If you experience technical issues with the Performance Budgeting System, you can use the "Help Request" option on the top menu within the Budgeting application to open a ticket or you can contact the PB Help Desk at the email address [PBHelpDesk@vita.virginia.gov](mailto:PBHelpDesk@vita.virginia.gov)

## Decision Package Module Quick Guides

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### AGENCY ANALYST QUICK GUIDE

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. Click Submit and select the appropriate action from the available options.
  1. 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.

2. Submit for Agency Review - Submits the decision package to the next step in the workflow.
3. Void Document - Voids the decision package.

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## AGENCY REVIEWER QUICK GUIDE

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 a 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. The Rate Adjustment tab is not appropriate for this submission. Please ignore this tab.
11. Click Submit and select the appropriate action from the available options.
  - a. 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.
  - b. Ready For DPB Bulk Submit – Places the decision package in a batch to be submitted to DPB via the Decision Package Bulk Submit to DPB module. (Make sure you also rank the decision package in the Decision Package Prioritization module.)
  - c. Return for Further Data Entry - Returns the decision package to the data entry workflow step.
  - d. Void Document - Voids the decision package.

## Overview Tab

### 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 'Enter Decision Package' form. The top navigation bar includes 'Work Tray', 'Operating Budget', 'Capital Budget', 'Budget Execution', 'Six-Year Plans', 'Narrative', 'Strategic Planning', 'Help Request', 'Administration', 'Reporting', and 'Logout'. The 'Enter Decision Package' header has buttons for 'Help', 'Print', 'Save', 'Validate', and 'Submit'. Below this is a sub-header with tabs: 'Overview' (selected), 'Budget Summary', 'Narratives', 'NGF Revenue Source', 'Budget Detail', 'Position Planning', 'Rate Adjustment', and 'Validation'. The form fields include: Agency (136: Virginia Information Technologies Agency), Biennium (2020-2022), Budget Round (Initial Bill), Title (Eliminate appropriation for Workplace Productivity Solutions service), and Category (Technical Adjustment). A 'Strategic Link' table is shown with columns for Measures, GF Percentage, and NGF Percentage. Below the table are buttons for 'Add', 'Import', 'Export', 'Clear', 'Choose Rows', and 'Refresh'. The 'Region' and 'Enterprise Strategy' fields are also present. The 'Agency Description' section contains a text box with funding information. At the bottom, there are checkboxes for 'Will new legislation be required as a result of this request?' and 'Is Appropriation Act Language required as part of this request?'. A 'Supporting Legislation' section shows 'No Files Uploaded' and an 'Upload File' button.

### Overview Tab 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. (2018-2020 is the default.)
4. Make sure the correct budget round is selected (initial budget, amended, or caboose).
5. Enter the Title for the decision package. (The *Amended Bill* will be your only option.)

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.

Select the category that most closely defines the proposed decision package. The following list of categories represents typical request categories.

- a. *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.
- b. *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.)

- c. *Emergencies*. The request is essential to prevent or eliminate an immediate threat to life, safety, health, or property.
- d. *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.
- 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. *New general fund spending initiatives*. This category is for proposing new general fund spending initiatives.
- g. *New nongeneral fund spending initiatives*. This category is for proposing new nongeneral fund spending initiatives.
- h. *Position level changes only*. This category is for technical changes (increases or decreases) to position levels that have no other impact on appropriated amounts.

- i. *Operational efficiencies and service reductions*. This category is to reflect proposals to implement efficiencies and/or service reductions. This usually involves a reduction in appropriation.
- j. *Reorganizations*. This category is to reflect proposals to reorganize your agency.
- k. *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).
- l. *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.
- m. *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.)
- n. *Other – NGF Only*. This category is for NGF only requests that do not fit any other category.
- o. *Other spending or initiatives*. This category is for any other proposals for additional resources that will require new or expanded services.

- 7. You may link a decision package to one or more performance measures in your agency's strategic plan via the **Strategic Link** grid. If you opt to link to a measure or measures you will need to enter the percent from GF and NGF sources associated with the request and applied to each applicable measure. These percentages must add up to a 100 percent. Note: measures are from agency strategic plans in Virginia Performs.
- 8. Select the **Region** of the state that the decision package most impacts. If it impacts more than one region, select "Multiple Regions".

9. 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.
10. 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. Cite quantitative data wherever possible.

11. Check **Will new legislation be required as a result of this request?** if new legislation is required as a result of the decision package.
12. Check **Is Appropriation Act Language required as part of this request?** if Appropriation Act language is required for the decision package.
13. 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.

## Narratives Tab

### Narratives Tab Overview

The purpose of the **Narratives** tab is to capture the justification for the decision package. 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.

Work Tray Operating Budget Capital Budget Budget Execution Six-Year Plans Narrative Strategic Planning Help Request Administration Reporting Logout

Enter Decision Package

Help Print Save Validate Submit

Overview Budget Summary **Narratives** NGF Revenue Source Budget Detail Position Planning Rate Adjustment Validation

Agency 136: Virginia Information Technologies Agency Biennium 2020-2022 Budget Round Initial Bill ABC

Title Eliminate appropriation for Workplace Productivity Solutions ser Category Technical Adjustment

Consequences of not funding/Justification

The appropriation for Fund 0932 (Program 82803) will remain available but will not be used.

Alternatives considered (must list at least one)

Do nothing. This would leave budget funding in Chapter 2 that will not be utilized.

Explanations and Methodologies

To remove all but \$150,000 in FY2020 and the complete appropriation - \$1,110,137 in FY2021 and forward.

Supporting Documentation No Files Uploaded

+ Upload File

### Narratives Tab Instructions

1. Click on the **Narratives** tab.
2. 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.

# Budget Summary Tab

## 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.

The screenshot shows the 'Enter Decision Package' interface with the 'Budget Summary' tab selected. The 'Summary of Costs and Positions' grid is displayed, showing data for FY 2021 and FY 2022. The grid includes columns for Object Type, FY 2021 Req, FY 2022 Req, and years FY 2023 through FY 2026, along with a One-Time checkbox.

	Object Type	FY 2021 Req	FY 2022 Req	FY 2023 Req	FY 2024 Req	FY 2025 Req	FY 2026 Req	One-Time
1	GF Dollars	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>
2	NGF Dollars	\$1,067,600	\$1,067,600	\$0	\$0	\$0	\$0	<input type="checkbox"/>
3	GF Positions	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
4	NGF Positions	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
5	Layoffs	0	0	0	0	0	0	<input type="checkbox"/>
6	GF Transfer	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>
7	GF Revenue	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>
8	Additions to Balance	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>

At the bottom of the grid, there are buttons for 'Import', 'Export', and 'Refresh'. The page number is 1 of 1, and the total number of rows is 8.

## Budget Summary Tab 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 Commonwealth, and "Additions to Balance" is for the reversion of general fund balances from agencies to the General Fund.

## Budget Detail Tab

### 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 (including service area), 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.

Program	Fund	Subobject	FY 2021 Dollars Req	FY 2022 Dollars Req	One-time Funding?
All	All	All			
82003: Network Service	06136: VITA Internal Ser	1273: Information Manag	\$1,067,600	\$1,067,600	<input type="checkbox"/>

### Budget Detail Tab Instructions

1. Click on the **Budget Detail** tab.
2. If applicable, 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,



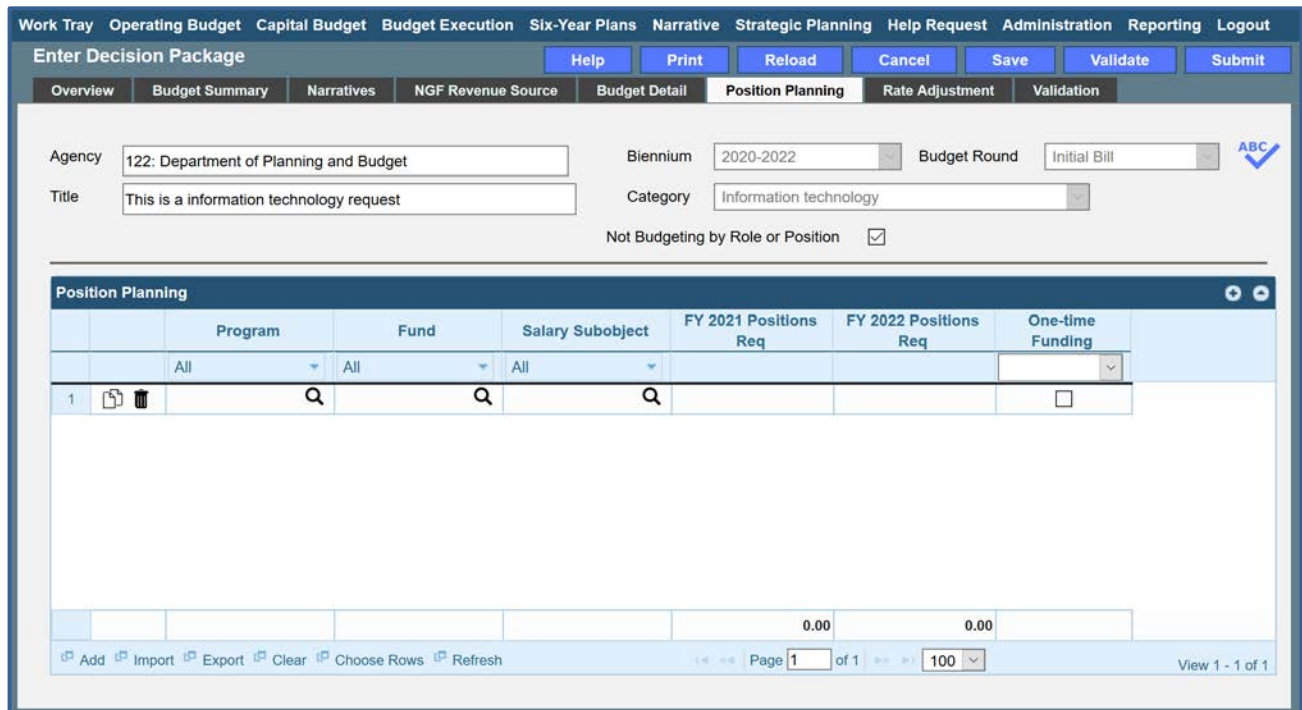
create a separate line for the one-time amount and another for the ongoing funding requirements.

6. Add rows to the **Total Services** grid as needed to specify multiple nonpersonal services budget lines by using the button.

## Position Planning Tab

### 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. The position planning tab allows you to enter authorized position and salary information by either position or 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.



### Position Planning Tab Instructions

#### Not Budgeting by Position or Role

Use this option to record authorized positions only in the position planning grid. This is the recommended method for this submission. Use this method in conjunction with the Position Calculator on the DPB website to calculate personal services costs. See the "Calculating the Cost of Personal Services" section of these instructions for more information.

1. Click on the **Position Planning** tab.
2. Check the **Not Budgeting by Position or Role** checkbox.

3. In the **Position Planning** grid, enter the total number of positions for the Agency for both the first year and second years of the biennium in the **FY 20XX Positions** cells.
4. Add rows to the **Position Planning** grid, by clicking the **Add** button in the lower left corner of the grid as needed.
5. Authorized positions can also be uploaded from an .Excel file.

### Position Planning by Role / Position Planning by Position

Using the Position Planning grid to calculate Personal Services costs by role or position is not recommended for this submissions. Instead, use the “Not Budgeting by Role or Position” option (above) for authorized positions and the Position Calculator on the DPB website to calculate the dollar costs. See the “Calculating the Cost of Personal Services” section of these instructions for more information.

## NGF Revenue Source Tab

### NGF Revenue Source 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. 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.

### NGF Revenue Source 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.
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.

## Rate Adjustment Tab

### 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 to the **Narratives** tab.

### Rate Adjustment Tab 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.

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# Decision Package Bulk Submit Instructions

## Performance Budgeting System

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### Bulk Submit Overview

The purpose of the Decision Package Bulk Submit to DPB module is to allow an agency to submit all their decision packages to DPB at once.

Agency: 136: Virginia Information Technologies Agency

Set all to: -- Please Select --

Submit

Base Budget Adjustments		
	Agency	Document Title
1		

Submit Action

Export Refresh

Page 1 of 1 50

View 1 - 1 of 1

### Bulk Submit Instructions

1. To ensure that all requests are accounted for, look at the Document Title column to review the base budget adjustments.
2. Confirm that the Step Title and State fields are correct for each of the base budget adjustments.
3. To bulk manage the submit action, click the Set all to dropdown and select the submit action that the requests require: Submit to DPB, Continue Review, or Return to Previous Submitter. If submitting to DPB, all requests must be set to Submit to DPB. The submit actions correspond to the submit actions in the Decision Package module documentation.
4. Click the Submit button. A message will display in the text box below the submit button to alert you that the submission was successful. If you receive a message that one or more work items could not be submitted, you should navigate to the work tray and open the work items to determine if they are failing validation rules for some reason.

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# Decision Package Prioritization Instructions

## Performance Budgeting System

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### Decision Package Prioritization Overview

The purpose of the Decision Package Prioritization module is for an Agency Analyst or Agency Reviewer to rank the agency's decision packages prior to submitting them to DPB. This prioritization helps DPB and decision makers to assess the criticality of each request. Please note you are only permitted to use whole numbers when prioritizing decision packages and the priorities must be unique.

The screenshot shows the 'Decision Package Prioritization' module interface. At the top, there is a navigation bar with links: Work Tray, Operating Budget, Capital Budget, Budget Execution, Six-Year Plans, Narrative, Strategic Planning, Help Request, Administration, Reporting, and Logout. Below this, the module title 'Decision Package Prioritization' is displayed with a 'Help' button. The main area contains search filters: 'Agency' (194: Department of General Services), 'Biennium' (2020-2022), and 'Budget Round' (Initial Bill). Below the filters is a table titled 'Decision Package Prioritization' with columns: Decision Package Title, FY 2021 GF Dollars, FY 2022 GF Dollars, FY 2021 NGF Dollars, FY 2022 NGF Dollars, and Agency Ranking. The table shows one row with a ranking of 1. At the bottom, there are buttons for 'Export', 'Choose Rows', and 'Refresh', along with pagination information (Page 1 of 1, 500 rows) and 'Save Prioritization' and 'Reload' buttons.

	Decision Package Title	FY 2021 GF Dollars	FY 2022 GF Dollars	FY 2021 NGF Dollars	FY 2022 NGF Dollars	Agency Ranking
1						1

### Decision Package Prioritization Instructions

1. Mouse over the Operating Budget Functional Area menu item and then mouse over Decision Package from the resulting dropdown menu. An additional menu will appear. Click on Decision Package Prioritization. The Decision Package Prioritization module will appear.
2. Click on the **Agency** box and enter or select an agency to rank the decision packages for that agency.
3. Confirm the **Biennium** and **Budget Round** for the decision packages.
4. To change the ranking of a decision package in the Decision Package Prioritization grid, click and hold on a decision package that should have a different rank. Move the decision package up or down using the mouse to insert the decision package at a higher or lower ranking. Then, release the mouse. The rankings of all decision packages will then be automatically adjusted. Re-rank as many decision packages as necessary until the desired ranking is achieved.

5. While working, if you would like to reload the rankings as they appeared upon the last save, click the **Reload** button
6. Once the desired ranking is achieved, click the **Save Prioritization** button to save the decision package ranking for an agency.