

Instructions for the Submission of Decision Packages

Operating Budget Requests – 2027 Session



Department of Planning and Budget

July 2026

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Decision Package Overview

About the Decision Package Submission

This package provides guidance and instructions for the submission of operating budget decision packages to be considered as amendments to the 2026-2028 biennium budget. This submission is due to DPB by **Monday, September 14.**

Executive Department agencies should not submit decision packages to DPB without receiving approval from their applicable Cabinet Secretary.

Please remember that once you submit your decision packages to DPB, the request becomes public via the [Agency Operating Budget Requests Submissions report](#) on the DPB website.

To complete the submission, you will be using the Performance Budgeting system Decision Package module and optionally, the Decision Package Bulk Submit to DPB module. 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 these instructions under the section titled “Decision Package Module Detailed Instructions – Performance Budgeting System”.

These instructions highlight key topics such as technical adjustments, non-technical adjustments, personal services, non-personal services, nongeneral fund revenue sources associated with proposed budget changes, 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 decision packages to submit them all to DPB at once.

Categorizing Submissions

Distinguishing between technical adjustments and non-technical adjustments is essential in creating your decision packages. Technical adjustments are a discrete decision package category. Non-technical decision packages fall into several other categories. If you intend for a budget request to be addressed as a technical adjustment, you must categorize it as “Technical Adjustment” in the “Category” field of the decision package “Overview” tab. Provided below are definitions that should help in determining what type of decision package you are submitting,

A technical adjustment is a proposal to modify your agency’s budget that does not involve changes in policy. Technical adjustments may involve things such as the transfer of dollars or positions between programs or service areas to reflect the correct implementation of budgeted amounts.

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 budgetary impact.

The following is a list of technical and non-technical categories. If you are not sure whether a request should be categorized as a technical adjustment or submitted under a non-technical category, contact your DPB budget analyst for guidance. Otherwise, the request should be submitted as a non-technical decision package.

- **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.
- **Emergencies** The request is essential to prevent or eliminate an immediate threat to life, safety, health, or property.
- **Affordability Improvements** This category is for proposals that address affordability issues for Virginians, particularly as it relates to healthcare, energy, and housing costs (see [Executive Order 1](#) and [Executive Order 3](#)).
- **Diversify and grow the economy** This category is for proposals designed to grow and/or diversify Virginia's economy, especially in the wake of recent and potential future federal reductions (see [Executive Order 5](#)).
- **Increase effectiveness and efficiency of operations** This category is for requests that will improve service delivery and/or increase the efficiency of Commonwealth operations.
- **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.)
- **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.)

- **Information technology** This category is for proposals for information technology resources, including hardware, software, telecommunications equipment or services, and any related consulting, training, or support/maintenance services.
- **Reorganizations** This category is to reflect proposals to reorganize your agency.
- **Salary increases and regrades** This category should be used to identify requests for salary increases for agency staff or for salary increase funding for state supported local employees.
- **Other new general fund spending initiatives** This category is for proposing new general fund spending initiatives (other than those included in other categories).
- **Other new nongeneral fund spending initiatives** This category is for proposing new nongeneral fund spending initiatives (other than those included in other categories).
- **Zero-Sum Transfers** This category is for requests that involve the transfer of appropriation amounts between programs, agencies, etc.
- **Position level changes only** This category is for technical changes (increases or decreases) to position levels that have no other impact on appropriated amounts.
- **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 that does not involve the creation or expansion of a program.
- **Appropriation Act language only** This category is for proposals to modify language in the Appropriation Act. Proposals in this category should have no impact on the appropriation amounts.
- **Other – NGF Only** This category is for NGF only requests that do not fit any other category.

Each decision package (technical or non-technical) 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.

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>2026-28 Budget Development Rates/Factors¹</i>
1111	VRS Retirement Contributions	
	State Employees	11.07%
	State Employees – Hybrid ²	11.07% Plus ²
	Virginia Law Officers Retirement (VaLORS)	22.60%
	State Police (SPORS)	31.67%
	Judges (JRS)	30.49%
1112	Social Security³	6.20% capped at \$184,500
1112	Medicare	1.45%
1114	Group Life	1.06%
1115	Annual Employer Health Insurance Premiums	
	COVA Care	
	Single	\$11,676
	Employee + One	\$20,940
	Family	\$30,636
	COVA High Deductible	
	Single	\$11,064
	Employee + One	\$20,496
	Family	\$29,904
	COVA HealthAware	
	Single	\$11,772
	Employee + One	\$21,144
	Family	\$30,948
	Kaiser Permanente	
	Single	\$10,728
	Employee + One	\$19,032
	Family	\$27,804
	Sentara Health Plans	
	Single	\$10,848
	Employee + One	\$19,404
	Family	\$28,140
1116	Retiree Health Insurance Credit Premium	0.70%
1117	VSDP & Long-Term Disability Insurance	0.42%
1118	Optional Retirement Plan for Higher Education (ORPHE) Defined Contribution⁴ Plan 1	10.40%
	ORPHE Defined Contribution⁴ Plan 2	8.50%
1119	Optional Retirement Plan for Political Appointees (ORPPA) Defined Contribution⁵ Plan 1	10.40%
	ORPPA Defined Contribution⁵ Plan 2	8.50%
1138	Deferred Compensation Match Payments	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

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

² Certain state employees hired on or after January 1, 2014 are enrolled in a hybrid defined benefit / defined contribution retirement plan. The actual employer contribution rate for these plans includes the base contribution rate (11.07% for state employees) plus the *Total Additional Employer Contribution Above Base Contribution* column in the following table:

Hybrid Employee Voluntary Contribution	Employer Hybrid Mandatory Match		Employer Additional Match (Based on Employee Voluntary Contribution)		Total Additional Employer Contribution Above Base Contribution
0.00% (Employee)	1.00%	+	0.00%	=	1.00%
0.50% (Employee)	1.00%	+	0.50%	=	1.50%
1.00% (Employee)	1.00%	+	1.00%	=	2.00%
1.50% (Employee)	1.00%	+	1.25%	=	2.25%
2.00% (Employee)	1.00%	+	1.50%	=	2.50%
2.50% (Employee)	1.00%	+	1.75%	=	2.75%
3.00% (Employee)	1.00%	+	2.00%	=	3.00%
3.50% (Employee)	1.00%	+	2.25%	=	3.25%
4.00% (Employee)	1.00%	+	2.50%	=	3.50%

³ The Social Security cap applies to calendar year 2026. Future year caps are unknown at this time.

⁴ For institutions of higher education: This 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.

⁵ 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

The position planning grid within the Performance Budgeting system can calculate the cost of personal services. See the section in this document on the Position Planning grid in the Decision Package module for more information. The downside of using the position planning grid to calculate personnel costs is that it does not provide details about how the calculations are made. If you prefer that additional level of detail, using this option may not be the best for you.

Instead, you may use the standalone position calculator which has been posted on the DPB website where you downloaded these instructions. This position calculator is a Microsoft Excel spreadsheet that will assist you with calculating personal services costs in detail 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 are included in the position calculator spreadsheet.

Requests for Salary Increases

For requests involving additional funds for employee salaries, agencies should address the extent to which current compensation levels are sufficient at 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

For nonpersonal services, you should at minimum, array amounts by major object of expenditure unless a more detailed subobject detail is desired. You should use the allowable “XX95” nonpersonal convenience subobject codes listed in the table on the following page if arraying these amounts by major object. **No other budgetary convenience subobject codes should be used.**

If you choose to array your submission by more detailed subobjects, you may also refer to the complete subobject code listing available at the following link:

<https://reports.dpb.virginia.gov/coa50>

Allowable Nonpersonal Services Convenience Codes

For any portion of your base adjustment details or zero-sum technical adjustment decision packages where you are rolling nonpersonal services to a summary level of detail, you may use the budgetary convenience codes listed in the table below. You should not use other budgetary convenience codes.

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

Nongeneral Fund Revenue Source

If you are requesting a decision package for nongeneral fund appropriation that will generate the collection of new or additional revenue above and beyond the base level of revenue that will be 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

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 in as 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 proposed decision package submissions by clicking on the [BD 117 - Agency Budget Requests](#) 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.

The screenshot displays the 'Agency Budget Requests' report configuration page. At the top, there are navigation links: 'Report Filter', 'Submit', 'Help', 'Back to Report Menu', and 'Export to CSV Excel PDF'. The main configuration area is divided into several sections:

- Biennium:** A dropdown menu set to '2026-2028'.
- BudgetRound:** A dropdown menu with options 'Initial', 'Amended', and 'Caboose'.
- Sec Groups Analyst:** Radio buttons for 'Sec' (selected), 'Groups', and 'Analyst'.
- Agencies:** A list of agencies including '194: Department of General Services', '195: Secretary of Labor', '197: Direct Aid to Public Education', '198: *Virginia Department for Children', '199: Department of Conservation and', '200: Children's Services Act', '201: Department of Education, Centra', and '202: The Library Of Virginia'.
- Request Type Group:** A list of request types including 'Base Budget', 'Base Budget Adjustments', and 'Decision Packages'.
- Workflow Step:** A list of workflow steps including 'Draft', 'Agency Review', 'Ready for DPB Review', and 'DPB Review'.
- Decision Package Category:** A list of categories including 'Appropriation Act language only', 'ARPA - Other Grants', 'ARPA - SLRF - CH 1 Amounts', and 'ARPA - SLRF - New Request'.

Below these sections, there are three main option groups:

- Output Option:** Radio buttons for 'Formatted' (selected), 'Summary', 'Aggregate Dollars', 'Dollar Details', 'Aggregate Positions', and 'Position Details'.
- Formatted Report Options:** A checked checkbox for 'Formatted'.
- Numbers:** A checked checkbox for 'Requests'.
- Totals:** A checked checkbox for 'Grand Totals', and unchecked checkboxes for 'Secretarial Totals' and 'Agency Totals'.
- Narratives:** A section with two columns of options. Under 'Base Budget Adjustments', 'Description' is checked and 'Agency Comments' is unchecked. Under 'Decision Packages', 'Agency Description' is checked, and 'Consequences of not Funding / Justification', 'Alternatives Considered', and 'Explanations and Methodologies' are unchecked.

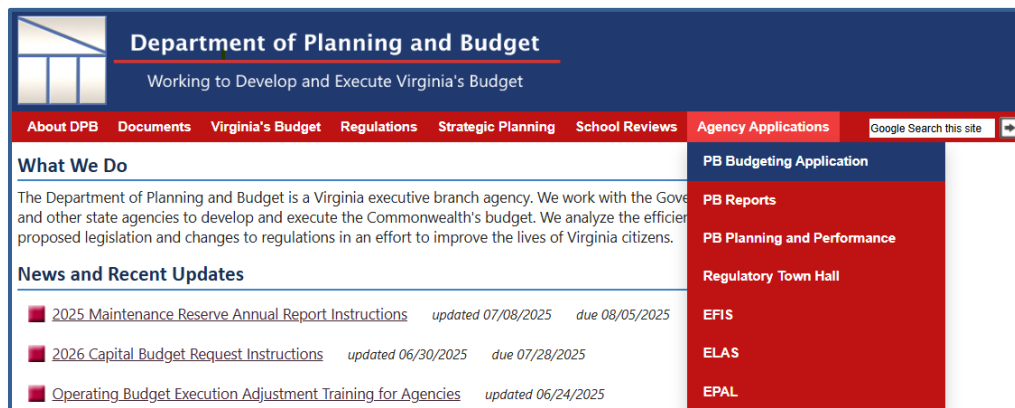
Using the BD 117 report, you can view requests at different levels of detail including at a summary level which can be viewed by choosing the “Formatted” or “Summary” output options. In addition, requests can be viewed at various summation levels using the “Aggregate Dollars” or “Aggregate Positions” output options or you can view the raw details using the “Dollar Details Analysis Grid” or “Position Details Analysis Grid” output options. The “Formatted” option is designed to be exportable to a PDF file but any of the other options can be exported to Excel after the report is run.

Decision Package Module Instructions - Performance Budgeting System

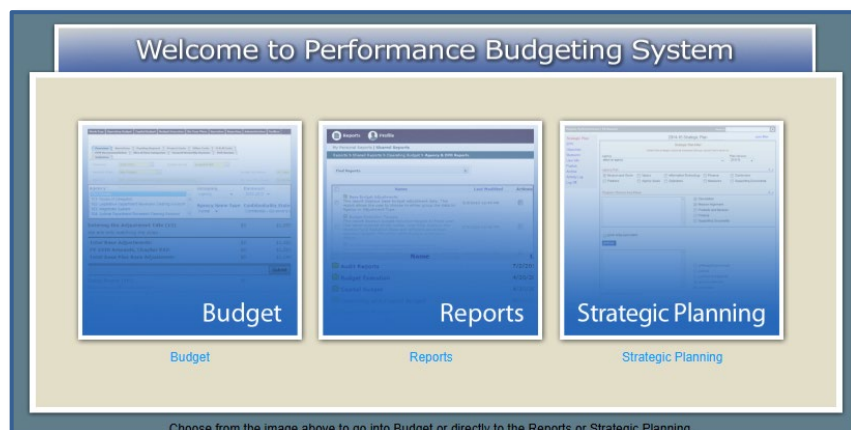
The decision package module is used for proposals to modify your agency's budget or to modify language in the Appropriation Act. These proposals will be in the form of either technical or non-technical adjustments which should address and justify one budget action only. The action proposed in each decision 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.

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 "Service Desk 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

To access the Performance Budgeting system, select PB Budget Application from the Agency Applications menu bar on the [DPB website](#).



In the screen that opens next, click the Budget button to open the Performance Budgeting system work tray.



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 a decision package.

Work Tray	Operating Budget	Capital Budget	Budget Execution	Six-Year Plans	Narrative	Strategic Planning	Service Desk Request	Administration
My Work	Base Budget							
	Base Budget Adjustment							
	☒ Decision Package	Decision Packages						Work Item Name
	☐ Supplemental Rep	Decision Package Prioritization						
	☐ Budget Savings	Decision Package Bulk Submit to DPB						
☐ BEX.2024.158.50765	FY25 Realignment of Appropriation							

At any time, agencies may submit or save the work item as indicated in the instructions below. The work item will then be available in the work tray for you and others with the same permissions in the Performance Budgeting System.

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.

Enter Decision Package

Help Print Reload Cancel Save Validate Submit

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

Agency 136: Virginia Information Technologies Agency Biennium 2026-2028 Budget Round Initial Bill

Title Adjust budget details between subobjects of expenditure Category Zero Sum Technical Adjustments

Strategic Link	
Measures	GF Percentage NGF Percentage
1	0.00% 0.00%

Add Import Export Clear Choose Rows Refresh Page 1 of 1 20 View 1 - 1 of 1

Region Enterprise Strategy

Agency Description of Request

This technical request moves base budget amounts between budgetary convenience subobject codes and other expenditure codes to better reflect the potential use of budgeted amounts.

☐ Will new legislation be required as a result of this request?

☐ Is Appropriation Act Language required as part of this request?

Supporting Legislation

No Files Uploaded

+ Upload File

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 (*2026-2028* is the default).
4. Make sure the correct **budget round** is selected (*amended bill* is the default).
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.

Select the category that most closely defines the proposed decision package. (*Appropriation Act language only, Caseload or workload adjustments, Unanticipated and unavoidable cost adjustments, etc.*)

7. **Strategic Link grid.** You should skip this field. At this time, the update of the Strategic Plan information has not been completed so linking to the old information is not recommended.
8. Select the **Region** of the state that the decision package most impacts. If it impacts more than one region, select "Multiple Regions".
9. **Enterprise Strategy.** You should skip this field. At this time Strategic Plan information has not been updated so linking to the old information is not recommended.
10. Enter the **Agency Description of Request** for the decision package.

Summarize the actions your agency proposes to take with the requested dollars or positions. Provide information to indicate the need for the proposed change and the projected return on the requested investment. Cite quantitative data wherever possible. If the decision package is for language only, explain what the language will allow the agency to do. Please keep this description as brief as possible while describing the need and projected outcomes of the budget request. Note: Entry in this field is limited to 3,500 characters.

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 for 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.

The screenshot shows the 'Narratives' tab selected in a multi-tabbed interface. The tabs include Overview, Budget Summary, Narratives, NGF Revenue Source, Budget Detail, Position Planning, Rate Adjustment, and Validation. The main form area contains several sections:

- Agency:** 136: Virginia Information Technologies Agency
- Biennium:** 2026-2028
- Budget Round:** Initial Bill
- Title:** Adjust budget details between subobjects of expenditure
- Category:** Zero Sum Technical Adjustments

Below these fields are three large text areas for narrative input:

- Consequences of not funding/Justification:** This is a technical change so the consequences of not adopting it are minimal. The main outcome would be that without the change, the agency's budget at the subobject of expenditure level does not accurately depict the potential uses of the budgeted amounts.
- Alternatives considered (must list at least one):** One alternative would be to wait until budget execution and submit a budget execution adjustment (BEX) request to transfer amounts between subobject codes.
- Explanations and Methodologies:** This request moves amounts from generic budgetary convenience codes to more object / subject codes to better depict the agency base budget.

At the bottom, there is a section for **Supporting Documentation** with the text 'No Files Uploaded' and a '+ Upload File' button.

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, any assumptions used, and 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 displays the 'Budget Summary' tab within a software application. At the top, there are several tabs: Overview, Budget Summary (selected), Narratives, NGF Revenue Source, Budget Detail, Position Planning, Rate Adjustment, and Validation. Below the tabs, there are input fields for Agency (136: Virginia Information Technologies Agency), Biennium (2026-2028), Budget Round (Initial Bill), Title (Adjust budget details between subobjects of expenditure), and Category (Zero Sum Technical Adjustments). A 'Summarize Budget' button is located to the right of the Category field. Below these fields is a table titled 'Summary of Costs and Positions'. The table has columns for Object Type, FY 2027 Req, FY 2028 Req, FY 2029 Req, FY 2030 Req, FY 2031 Req, FY 2032 Req, and One-Time. The rows include GF Dollars, NGF Dollars, GF Positions, NGF Positions, Layoffs, GF Transfer, GF Revenue, and Additions to Balance. The bottom of the interface shows 'Import', 'Export', and 'Refresh' buttons, along with a page indicator 'Page 1 of 1' and a view count 'View 1 - 8 of 8'.

	Object Type	FY 2027 Req	FY 2028 Req	FY 2029 Req	FY 2030 Req	FY 2031 Req	FY 2032 Req	One-Time
1	GF Dollars	\$0	\$0	\$0	\$0	\$0	\$0	☐
2	NGF Dollars	\$0	\$0	\$0	\$0	\$0	\$0	☐
3	GF Positions	0.00	0.00	0.00	0.00	0.00	0.00	☐
4	NGF Positions	0.00	0.00	0.00	0.00	0.00	0.00	☐
5	Layoffs	0	0	0	0	0	0	☐
6	GF Transfer	\$0	\$0	\$0	\$0	\$0	\$0	☐
7	GF Revenue	\$0	\$0	\$0	\$0	\$0	\$0	☐
8	Additions to Balance	\$0	\$0	\$0	\$0	\$0	\$0	☐

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 into 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.

The screenshot displays the 'Budget Detail' tab in a software application. At the top, there are several tabs: Overview, Budget Summary, Narratives, NGF Revenue Source, Budget Detail (selected), Position Planning, Rate Adjustment, and Validation. Below the tabs, there are input fields for Agency (136: Virginia Information Technologies Agency), Biennium (2026-2028), Budget Round (Initial Bill), Title (Adjust budget details between subobjects of expenditure), and Category (Zero Sum Technical Adjustments). The main area is a table titled 'Total Services' with columns: Program, Fund, Subobject, FY 2027 Dollars Req, FY 2028 Dollars Req, and One-time Funding?. The table contains 7 rows of data. The first row shows a total of (\$4,404,141) for FY 2027 and (\$4,404,141) for FY 2028. The subsequent rows show individual budget lines with their respective dollar amounts. The table is currently on page 1 of 1, showing 100 rows.

	Program	Fund	Subobject	FY 2027 Dollars Req	FY 2028 Dollars Req	One-time Funding?
1	82401: Information Tr	06136: VITA Internal	4100: Undistributed E	(\$4,404,141)	(\$4,404,141)	☐
2	82401: Information Tr	06136: VITA Internal	1123: Salaries, Class	\$197,000	\$197,000	☐
3	82401: Information Tr	06136: VITA Internal	1111: Employer Retir	\$27,916	\$27,916	☐
4	82401: Information Tr	06136: VITA Internal	1112: Federal Old-Ag	\$14,214	\$14,214	☐
5	82401: Information Tr	06136: VITA Internal	1115: Medical/Hospit	\$49,344	\$49,344	☐
6	82401: Information Tr	06136: VITA Internal	1395: Undistributed	\$100,000	\$100,000	☐
7	82401: Information Tr	06136: VITA Internal	1295: Undistributed	\$4,015,667	\$4,015,667	☐
				\$0	\$0	

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. Enter the FY 20XX Dollars for the budget line.
4. In the **Total Services** grid, if the budget line specified is one-time funding, 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.
5. 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.

Agency: 136: Virginia Information Technologies Agency
Title: Adjust budget details between subobjects of expenditure
Biennium: 2026-2028
Budget Round: Initial Bill
Category: Zero Sum Technical Adjustments
Budget by Role or Position: ☐ Budget by Position: ☐ Budget by Role: ☒
Not Budgeting by Role or Position: ☐
Populate Total Services

	Program	Fund	Salary Subobject	Role	Salary	Health Insurance	Retirement
1	All	All	All	All		All	All

Page 1 of 1, 100, View 1 - 1 of 1

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 these 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.

The screenshot shows the 'NGF Revenue Source' tab within a budgeting application. At the top, there are several tabs: Overview, Budget Summary, Narratives, NGF Revenue Source (selected), Budget Detail, Position Planning, Rate Adjustment, and Validation. Below the tabs, there are input fields for Agency (136: Virginia Information Technologies Agency), Biennium (2026-2028), Budget Round (Initial Bill), Title (Adjust budget details between subobjects of expenditure), and Category (Zero Sum Technical Adjustments). A blue checkmark icon is visible next to the Budget Round field. Below these fields is a table titled 'NGF Revenue Estimate'. The table has columns for Fund, Revenue Source, Revenue Action, Agency, FY 2027 Dollars Req, FY 2028 Dollars Req, FY 2029 Dollars Req, and FY 2030 Dollars Req. The first row is numbered 1 and contains search icons for the Fund, Revenue Source, and Agency columns.

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 anongeneral 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.

The screenshot displays the 'Rate Adjustment' tab within a software interface. At the top, there are several tabs: Overview, Budget Summary, Narratives, NGF Revenue Source, Budget Detail, Position Planning, Rate Adjustment (selected), and Validation. Below the tabs, there are input fields for Agency (136: Virginia Information Technologies Agency), Biennium (2026-2028), Budget Round (Initial Bill), Title (Adjust budget details between subobjects of expenditure), and Category (Zero Sum Technical Adjustments). 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, Proposed Unit, and Proposed Number of Units. The table has one row with a blue header and one row with a blue footer. The footer row contains the text '1', a trash icon, and the text 'Pro'.

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.

Submitting Decision Packages

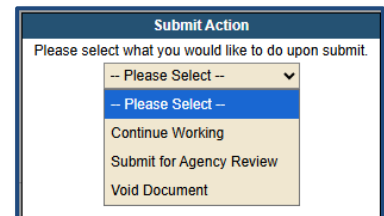
Decision Package Submission Overview

To submit a Decision Package work item to Agency Review or ultimately, to DPB, click the **Submit** button at the upper right corner of the work item screen. The options that appear after clicking the **Submit** button will vary depending on your permissions and the work flow step of the work item. The options for the two agency level permission types are detailed as follows.

Submitting Decision Packages as an Agency Analyst

The applicable submission selections for the Agency Analyst role are as follows:

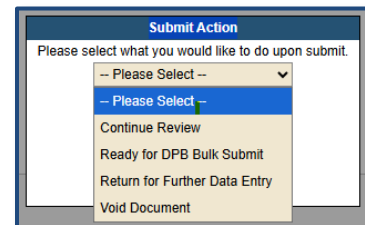
- *Continue Working* - Saves the work item and returns it to the Available Work Items on the Work Tray for users with similar credentials to claim.
- *Submit for Agency Review* - Submits the work item to the next step in the workflow.
- *Void Document* - Voids the work item.



Submitting Decision Packages as an Agency Reviewer

The applicable submission selections for the Agency Reviewer role are as follows:

- *Continue Working* - Saves the work item and returns it to the Available Work Items on the Work Tray for users with similar credentials to claim.
- *Submit for Agency Review* - Submits work item to the next step in the workflow if applicable.
- *Ready for DPB Bulk Submit* - Sets the work item as available to be bulk submitted along with others to DPB. Instructions on bulk submitting decision packages are included in the next section of this document.
- *Return for Further Data Entry* - Returns the work item to the previous work flow step. Selecting this option from the Agency Reviewer 1 step will return the work item to the Agency Analyst / Continue Entry step.
- *Void Document* - Voids the work item.



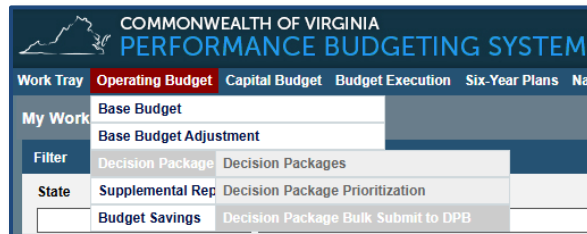
Notes:

- One individual may have both Agency Analyst and Agency Reviewer permissions in the Performance Budgeting system. This does not change the submission process.
- The *Submit for Agency Review* option will also appear under the Agency Reviewer selections if the agency has multiple Agency Reviewer levels established. If an agency only has one Agency Reviewer level, this option will only appear under the Agency Analyst level selections.
- Work items set as *Ready for DPB Bulk Submit* may later be submitted individually to DPB by the Agency Reviewer if that is preferred.

Decision Package Bulk Submit Instructions

Performance Budgeting System

To access the Decision Package Bulk Submit module, select “Decision Package Bulk Submit to DPB” under the “Decision Package” selection on “Operating Budget” menu.



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.



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.