STATE OF ALABAMA ACCOUNTING AND RESOURCE SYSTEM (STAARS)

QUARTERLY PERFORMANCE REPORT

A Guide for ALL Agencies

Welcome to STAARS Budgeting! STAARS Budgeting is the system of record for budgeting for the State of Alabama. The Quarterly Performance Reporting (QPR) application is to be used by state agencies as a tool for planning and documenting performance. It is required that each state agency input a minimum of one goal and one performance objective. As directed in Section 41-19-11 of the Budget Management Act (Code of Alabama 1975), each state agency/department is required to submit a performance report. These requirements will be accomplished through Performance Budgeting. This guide will walk users through the process of inputting annual and quarterly data.

To Access STAARS Budgeting on the Internet:

Access to two different areas of STAARS will be required. The QPR data will be completed in the STAARS Performance Budgeting application. Once all forms are complete, access to STAARS infoAdvantage will be necessary to run the QPR report generated in the application. Please contact your Agency Implementation Lead (AIL) for login credentials or STAARS Support at 334-353-9000 or STAARS.Support@Finance.Alabama.gov.

To access Performance Budgeting (PB)   https://budget.staars.alabama.gov

To access reports in infoAdvantage   https://infoadv.staars.alabama.gov/BOE/BI

Additional instructions for navigation and browser setup can be accessed at
http://staarstraining.alabama.gov

Mission, Vision, Goals and Performance Measures

Inputting initial data (Mission-Vision-Goals-Objective-Targets) into QPR reports is required for each new fiscal year.

The EBO recommends reviewing the mission, vision and goals performance measures for accuracy. If the department decides to make changes to either the mission, vision, goals, or performance measures (targets) make notes and contact your budget analyst.

I. MISSION/VISION

Step 1. Under the **Reference Data** category, select **Performance Budgeting**.

Step 2. From the **Performance Budgeting** screen, select **Performance Missions**.

The **Performance Missions Maintenance** screen will appear.

Step 3. In the **Code** field enter the **Department 3-digit number** (include the asterisk). Click **Search.**
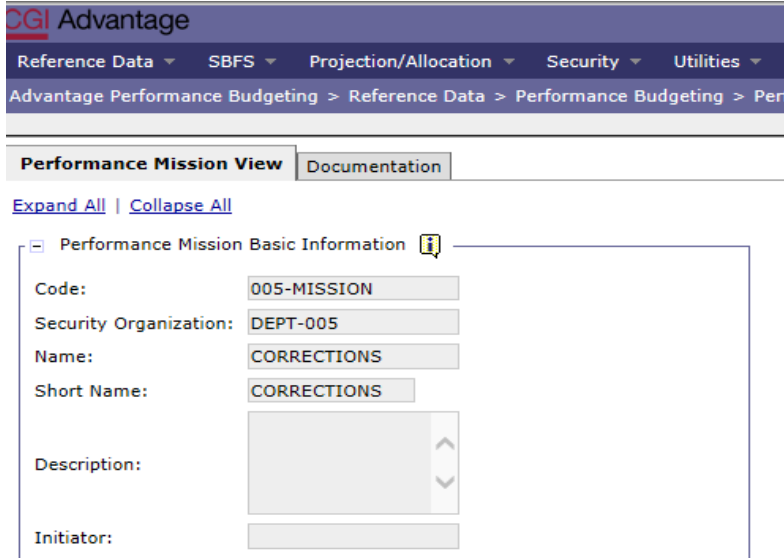
Search

Step 4. Select the code for your department to review the information in the performance hierarchy. **Click VIEW or EDIT** (for changes).

Step 5. Click **VIEW or EDIT** to verify the security organization, name and short name.
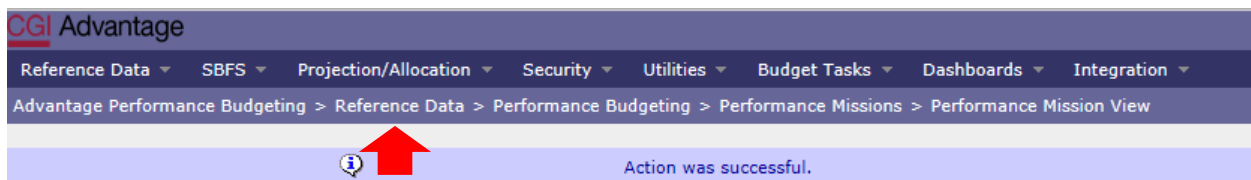
Step 6. Under the **Performance Mission Detail Information** section, edit the Mission of the department only if necessary.

Step 7. Once complete, click **Save** at the top of the page. The **Action was Successful** message will appear.

II. GOALS

Step 8. Using the thread (or bread crumb trail), return to the **Reference Data** screen.

Step 9. Select **Performance Budgeting** under the Categories section. The **Performance Budgeting** Screen will appear.
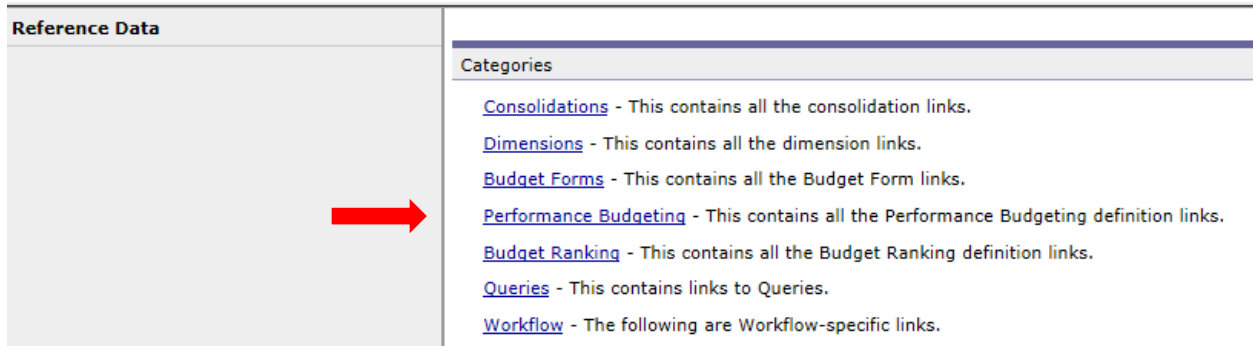
Step 9. From the **Performance Budgeting** screen, select **Performance Goals**.
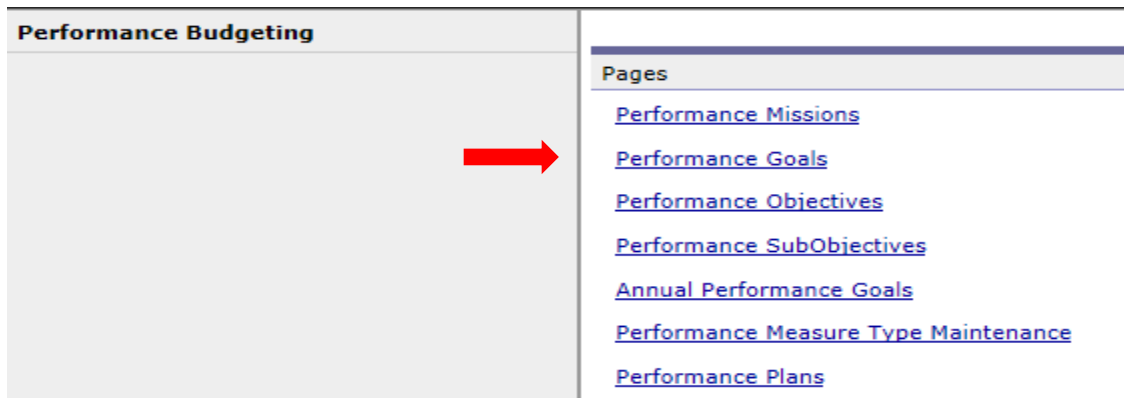
The **Performance Goals Maintenance** screen will appear.
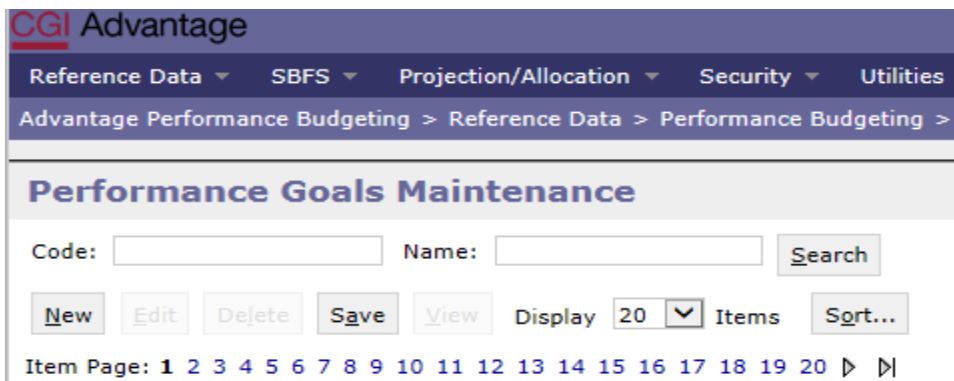
Step 10. In the **Code** field enter the **3-digit Department number** (include the asterisk). Click **Search.**

Search

Performance Goals Maintenance

Code: 005*   Name: [   ]   Search

New   Edit   Delete   Save   View   Display 20 ⌄ Items   Sort...

Step 11. Select the code for your department to review the information in the performance hierarchy. **Click VIEW or EDIT** (for changes).
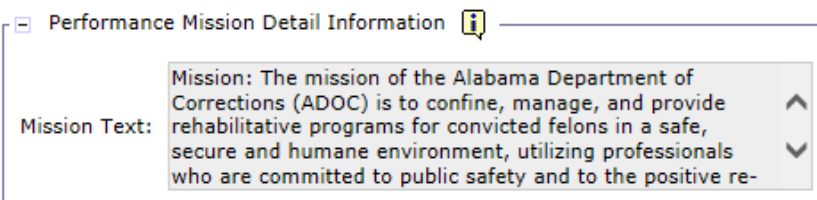
Performance Goals Maintenance

Code: 005*   Name: [   ]   Search

New   Edit   Delete   Save   View   Display 20 ⌄ Items   Sort...

☑	Code	Name
📄☑	005-GOAL-001	Optimize inmate healthcare spending to limit annual increase

Step 12. Click **VIEW or EDIT** to verify the **security organization**, **name**, **short name** and **description**.

| Performance Goal View | Performance Allocations | Milestones | Documentation |

Expand All | Collapse All

⊟ Basic Information ⓘ

* Code: [005-GOAL-001]

* Security Organization: [DEPT-005]   ✏

Name: [Optimize inmate health]

Short Name: [Optimize inmate]

Description: [Optimize inmate
                           healthcare
                           spending to limit
                           annual increases to
                           6% through 2016.]

Initiator: [   ]

Save

**Step 13.** Once complete, click **Save** [Save] at the top of the page. The **Action was Successful** message will appear.

III. PERFORMANCE PLANS

Step 14. Using the thread (or bread crumb trail), return to the **Reference Data** screen.
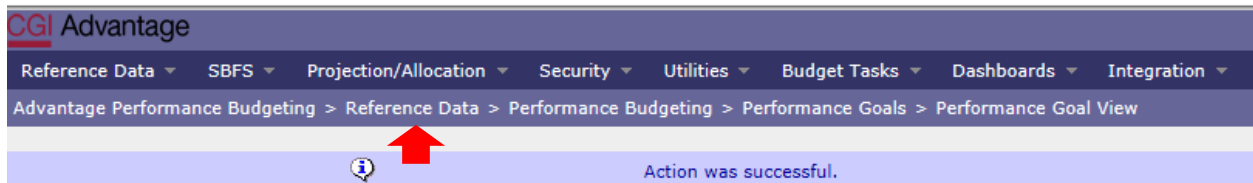
Step 15. Select **Dimensions** under the Categories section.
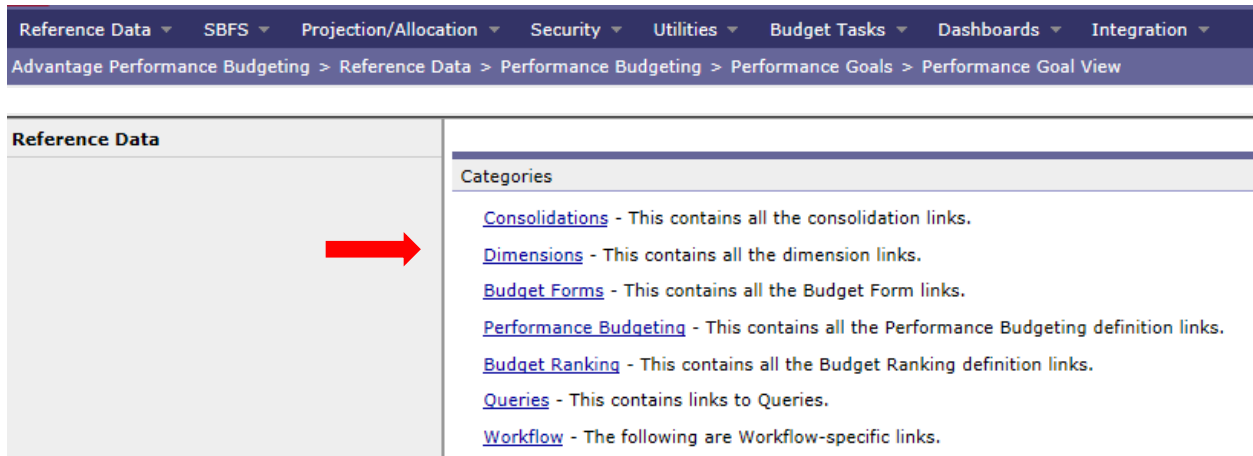
The **Dimensions** screen will appear.

Step 16. From the **Dimensions** screen, select **Budget Object Maintenance**.
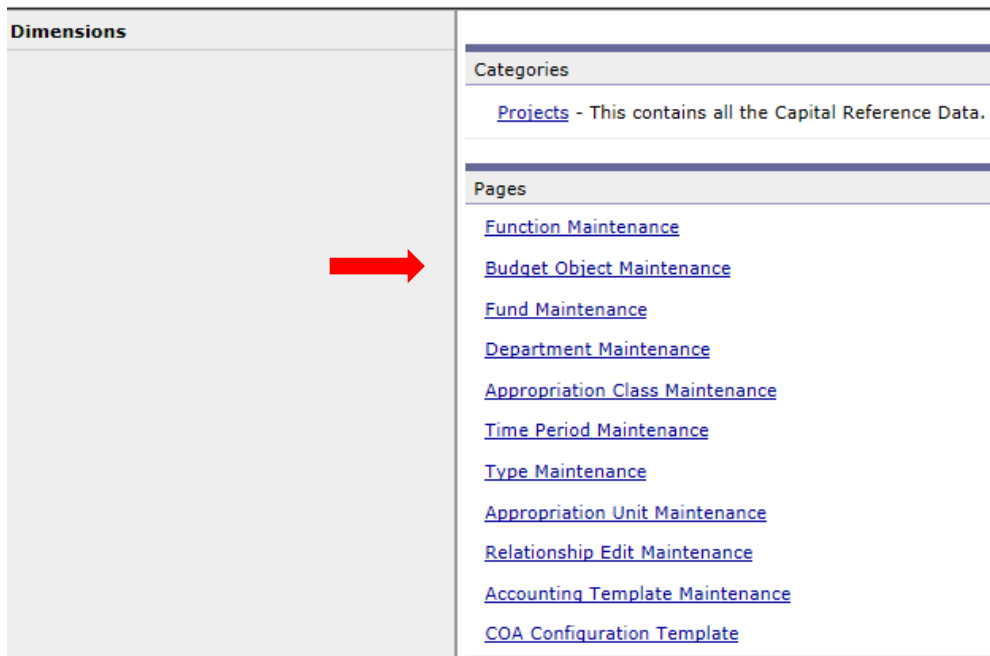
The **Budget Object Maintenance** screen will appear.

Step 17. In the **Budget Object Maintenance** screen, enter the department code (include the asterisk). Also, use the drop down arrow in the **Object Type** box to select **Performance Measure**. Click **Search.**

The **Performance Measure(s)** from prior year will be listed.

Step 18. Select the code for your department to review the information in the performance hierarchy. **Click VIEW or EDIT** (for changes).

Step 19. The screen will appear with details of the performance measure. Review and edit the name, short name, and description. **DO NOT CHANGE the Security Organization. Contact EBO.**

If add additional performance measures need to be added, contact the Budget Office. We will walk you through the process of creating new goals and/or measures.

Step 20. Once complete, click **Save** at the top of the page. The **Action was Successful** message will appear.

Quarterly Report Performance (Targets)

IV. TARGETS

Step 1. Using the tool bar, click on **Budget Task,** then click **Formulate Budget Request** from the dropdown menu.
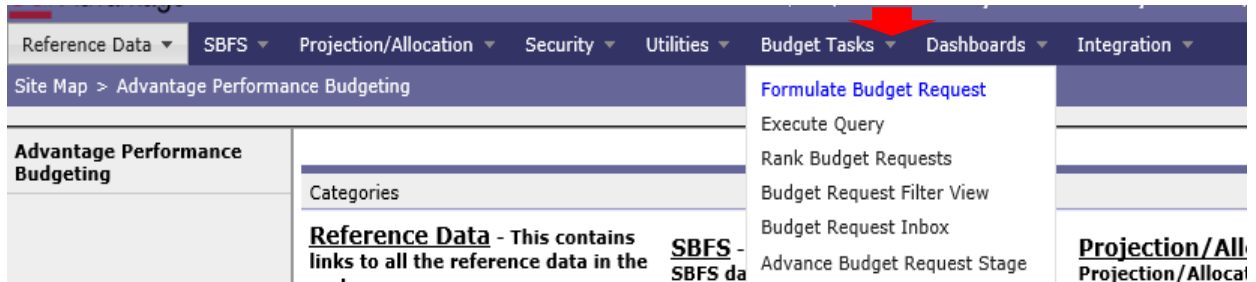
The **Budget Layout Selection** screen will appear.

Step 2. From the **Budget Layout Selection** screen, select **QPR Targets**.
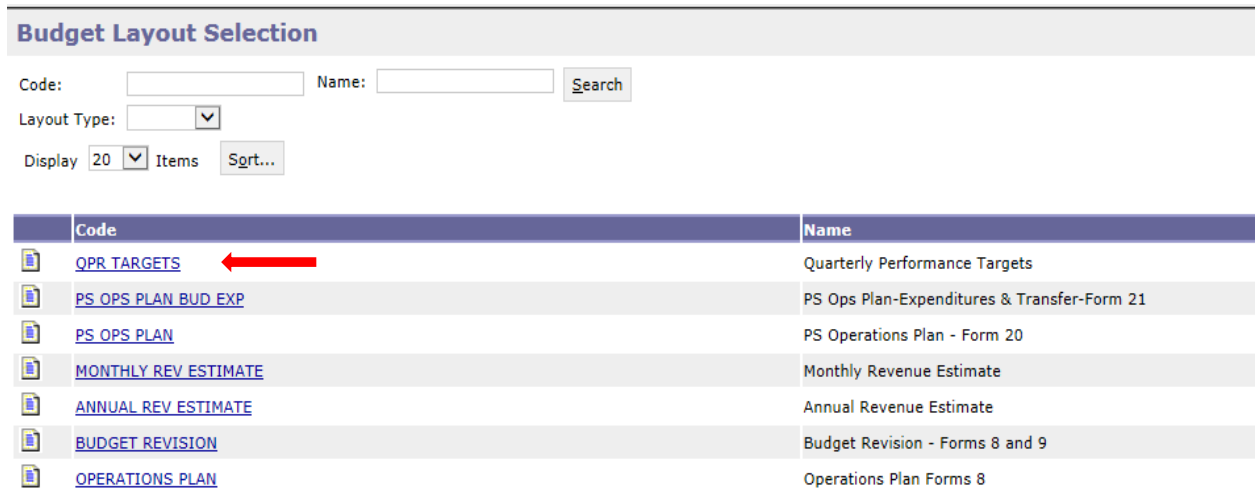
The **Select Budget Request** screen will appear.
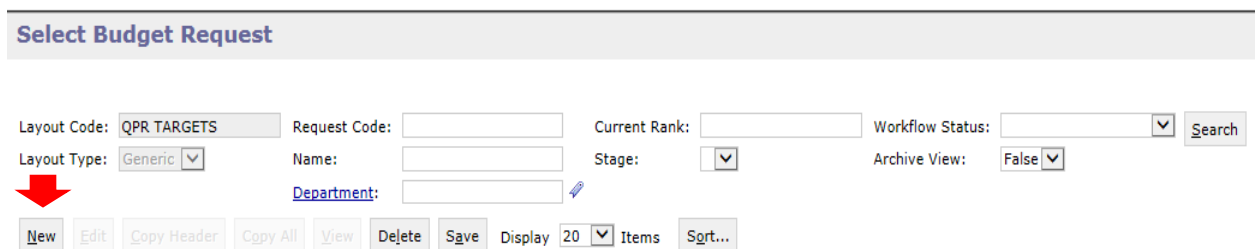
Step 3. **Click NEW** to create your targets. The Header page will appear.

Step 4. Complete the required fields in the **Budget Request Details** section by entering your agency information for the Form 8 as follows:

Enter the **Request Code** and the **Name** using the following format for both:

        REQUEST CODE EXAMPLE: **005 QPRT 2017**

                DEPARTMENT NUMBER: 005

                QPRT

                CURRENT FISCAL YEAR: 2017

        NAME: **005 QPRT 2017**

                DEPARTMENT NUMBER: 005

                QPRT

                CURRENT FISCAL YEAR: 2017

Step 5. Be sure to provide the **Department** number in the **Dimensions** section at the bottom of the header page.

Step 6. Once complete, click **Save** [Save] at the top of the page. The **Action was Successful** message will appear.

Supplementary tabs will emerge that will allow you to enter the quarterly and annual targets for each performance measure. The tabs are: **QPR Targets** and **Document Management**.

NOTE: You will never use the Document Management tab within Performance Measures. Documents (reports) will always be attached to an Operations Plan, Budget Request or Revision as a PDF.

Never use the Document Management tab in QPR

Step 7. Click **New Item** [New Item] to create a new target. Use the first line to begin entering the data.

Step 8. Begin with the **PM Obj** section. **Right click** in the field to search for the targets that preexist for the department.

The **Budget Object Search** screen will appear.

Step 9. **Click Search** again for the list of targets to appear. **Click Select** [Select] for the target(s) to add on the beginning of the year QPR report.

Step 10. Once the target is selected, the screen will return to the main screen allowing agencies to input the quarterly targets across **Quarter 1, Quarter 2, Quarter 3, and Quarter 4**. **NOTE:** The system will not automatically calculate the Annual Target column. You will need to enter the Annual Target total as well.

PM Obj	Unit	Quarter 1 Target	Quarter 2 Target	Quarter 3 Target	Quarter 4 Target	Annual Target
005-01		25,000,000	25,000,000	13,000,000	15,000,000	78,000,000

Continue by entering as many targets desired for the department to report quarterly performance indicators. (The example provided is an agency with one target).
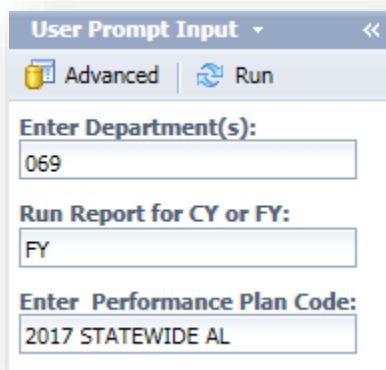
Step 11. Once all targets have been included, click **Save** [Save] at the top of the page. The **Action was Successful** message will appear.

SUBMISSION OF QUARTERLY PERFORMANCE REPORTS

TO THE EXECUTIVE BUDGET OFFICE

Annual Fiscal Year Operations Plan Submissions

The Quarterly Performance Report, ABUD-QPR-001, should be generated in CGI infoAdvantage. Once the report is created, please print a copy of the report and review the data for completeness and accuracy. Return to the Operations Plan-Form 8 in Performance Budgeting (PB) and attach the finalized QPR report as a PDF to the Document Management tab along with other documents required for submission of the annual Operations Plan. Annual Operation Plans will not be approved without the submission of the annual QPR goals and targets.

PROMPTS:

1. Enter Department(s) Number: 3-digit Agency Number
2. Run Report for CY or FY:
    a. For annual reporting input FY (Future Year) in the prompt.
    b. For quarterly reporting input CY (Current Year) in the prompt.
3. Enter Performance Plan Code: Prepopulates

Quarterly (4) Submissions throughout the Fiscal Year

EBO will continue to send out reminders when it's time for agencies to input quarterly targets. The application will be open for 30 days after each quarter ends. Agencies should log into PB to report actuals at the end of each quarter.

Once the Quarterly Performance Report, ABUD-QPR-001, report is generated please print a copy of the report and review the data for completeness and accuracy. Send your budget analyst a courtesy email notifying them that the Quarterly data has been completed. DO NOT click Submit and move QPR through workflow. At the end of the quarter EBO will access all agency reports to create a statewide report that will be posted to our website.

Below is an example of a completed Quarterly Performance Report at the beginning of the Fiscal Year.

Report ID: STAARS-QPR-0001	State of Alabama
Report Date: 7/13/16	Quarterly Performance Report
Report Time: 10:39:26 AM	Fiscal Year 2017

Cover Page

Parameters and Prompts

Department(s):	069
CY or FY:	FY
Performance Plan:	2017 STATEWIDE AL

Report Description

This report will display the performance targets and corresponding year-to-date actual information for an agency. The report will also display the mission, vision, and goals established by the agency. This report will be run on demand by regular agency, postsecondary institution, and EBO users, primarily during the operations plan cycle (June 1 – September 1). This report will also be run quarterly by agency and EBO users, coinciding with the recording of quarterly actuals.

Department: 069 - Ala Community College System

Mission: The Alabama Community College System has direct responsibility to the Alabama Community College System Board of Trustees for the direction and supervision of educational programs and services provided by the Alabama Community College System. The System Office provides leadership, service, and regulatory functions for the member institutions of the Alabama Community College System to ensure educational accessibility, excellence and equity for all citizens of Alabama.

Vision: To develop an educated, prosperous population by providing an affordable pathway to help citizens of any walk or stage of life to succeed through quality education and training; a community college system where education works for all.

Annual Goals

01	Provide a skilled workforce for Alabama's existing industries in targeted occupational sectors.
02	Increase the number of individuals served in Adult Education programs.
03	Conduct peer reviews at ACCS institutions; identify best practices, efficiencies & opportunities.

Quarterly Objectives and Targets

	Unit of Measure	Goal	First Quarter Target	First Quarter Actual	Second Quarter Target	Second Quarter Actual	Third Quarter Target	Third Quarter Actual	Fourth Quarter Target	Fourth Quarter Actual	Annual Target	Annual Actual
01 Increase number of students who earn a short-term or long-term certificate, degree, or an industry recognized credential.	Percentage	01	0	0	0	0	0	0	0	0	5	0
02 Increase the number of individuals served in Adult Education.	Percentage	02	0	0	0	0	0	0	0	0	5	0
03 Conduct peer reviews at two ACCS institutions will identify best practices, efficiencies, and opportunities for improvements.	Number	03	0	0	0	0	0	0	0	0	12	0