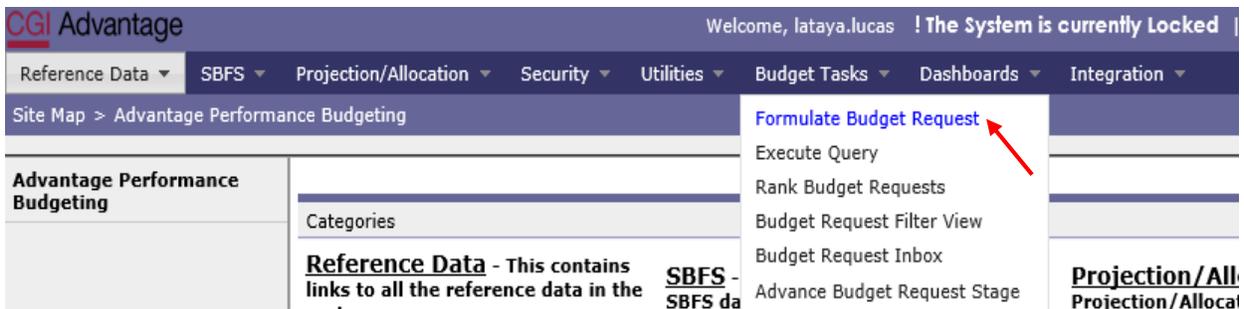


BUDGET REVISIONS MANUAL

FOR STATE AGENCIES

After you login STAARS Budgeting, you will be on the **Welcome Page** for the application. Begin by clicking the down arrow next to **Budget Tasks** on the task bar. Then select **Formulate Budget Request** on the drop down menu.



The **Budget Layout Selection** screen will appear. Notice the code name used to identify Forms 8 and 9 used for Budget Revisions.

Forms 8 and 9

BUDGET REVISION

Note: Form 9-Employee Staffing Plan will be generated by STAARS Budgeting after completion of Form 8. If applicable, Form 101 will also be automatically created based on entries created in Form 8.

FORMS 8 and 9 – BUDGET REVISION

Step 1. Select [BUDGET REVISION](#) under the Code section to begin creating Form 8 for the revision.

CGI Advantage Welcome, lataya.lucas ! The System is currently Locked

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Advantage Performance Budgeting > Budget Tasks > Budget Layout Selection

Budget Layout Selection

Code: Name:

Layout Type:

Display Items

Code	Name
BUD REQ BY FUNCTION	Budget Request- Forms 5 & 6
QPR TARGETS	Quarterly Performance Targets
PS OPS PLAN BUD EXP	PS Ops Plan-Expenditures & Transfer-Form 21
PS OPS PLAN	PS Operations Plan - Form 20
BUD REQ BY DEPT	Budget Request- Department level- Forms 1 & 3
MONTHLY REV ESTIMATE	Monthly Revenue Estimate
QPR Q1 ACTUALS	Quarter 1 Performance Actuals
QPR Q2 ACTUALS	Quarter 2 Performance Actuals
QPR Q3 ACTUALS	Quarter 3 Performance Actuals
QPR Q4 ACTUALS	Quarter 4 Performance Actuals
ANNUAL REV ESTIMATE	Annual Revenue Estimate
PS BUD REQ E&G	PS Restricted & Unrestricted & E & G Budget Request-Form 14
PS BUD REQ AUXILIARY	PS Unrestricted Auxiliary Enterprises Bud Req - Form 14
PS BUD REQ PERSONNEL	PS Restricted & Unrestricted Personnel Bud Req-Form 17
PS BUD REQ HOSPITAL	Post Secondary Hospital Financial Summary Bud Req - Form 14A
BUDGET REVISION	Budget Revision - Forms 8 and 9
OPERATIONS PLAN	Operations Plan Forms 8

Step 2. On the [Select Budget Request](#) screen click [New](#).

CGI Advantage Welcome, dept.entry2 !

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾

Advantage Performance Budgeting > Budget Tasks > Formulate Budget Request > Select Budget Request

Select Budget Request

Layout Code: Request Code: Current Rank:

Layout Type: Name: Stage:

Department:

Display Items

The [Create Budget Request](#) screen appears.

Step 3. 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: 050 OP Revision 13

Follow the same format for the Name field

Agency Number: 3 digits

OP Revision

Then the sequential revision number

NAME EXAMPLE: 050 OP Revision 13

Step 4. Be sure to provide the **Department** number in the **Dimensions** section at the bottom of the header

page.

Step 5. Once complete click **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 department data for the Form 8 and 9 revision. The tabs are: **Form 8 Operations Plan, Form 8 Source of Funds, Form 9 Position changes, Revision Justification** and **Document Management**.



Action was successful.

Save

Back

Edit Budget Request

Form 8 Operations Plan

Form 8 Source of Funds

Form 9 Position Changes

Revision Justification

Document Management

FORM 8 OPERATIONS PLAN TAB



Step 1. Select the **Form 8 Operations Plan** tab.

Step 2. Click **New Item**  to insert a line.

Step 3. Enter the **Appropriation Class, Function, Fund, Appropriation Unit,** and **Budget Object** that needs to be revised. NOTE: that data from MULTIPLE Form 8's may be entered on this form. The reports generated in infoAdvantage will create individual Form 8's and Summary Form 8's based on the data entered in this tab.

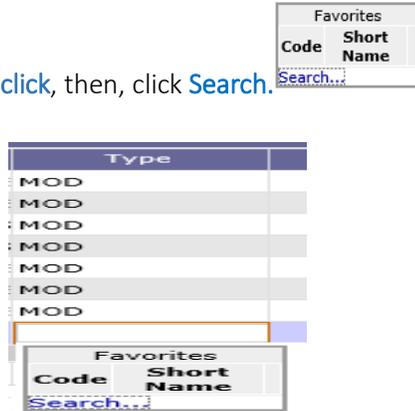
[Export](#)
[Import](#)
[Audit Trail](#)
[View Graph](#)

[View as CSV](#)

Summary						
<input type="checkbox"/>	Line	Appropriation Class	Function	Fund	Appropriation Unit	Budget Object
<input type="checkbox"/>	1	918	0619	0100	0	0203
<input type="checkbox"/>	2	918	0619	0100	0	0202
<input type="checkbox"/>	3	918	0619	0100	0	FTE
<input type="checkbox"/>	4	918	0619	0100	0	POS
<input type="checkbox"/>	5	918	0619	0100	0	0104
<input type="checkbox"/>	6	918	0619	0100	0	0129
<input type="checkbox"/>	7	918	0619	0100	0	0201
<input checked="" type="checkbox"/>	8	<input type="text"/>				

A red arrow points to the 'New Item' button, and another red arrow points to the input field for line 8.

Step 4. In the **Type** field, right click, then, click **Search**. The **Type Search** screen displays.



Step 5. Click the **Search** again to display the options for the **Type** field.

	Code	Name	Short Name	Element Type
Select	NEW	New Line	New Line	COA
Select	MOD	Modify Line	Modify Line	COA

This field is used to either add a new line (NEW) in the Operations Plan or modify (MOD) a line that already exists in the Operations Plan. If you are unsure whether a line exists in the Operations Plan, run the AFIN-BUD-013 (formerly P421) report in infoAdvantage. This report represents your current Operations Plan and will help you determine if the **Type** field in the revision should be NEW or MOD.

Step 6. Select the appropriate **Type** and it will populate in the form.

Summary									
<input type="checkbox"/>	Line	Appropriation Class	Function	Fund	Appropriation Unit	Budget Object	I	Type	
<input type="checkbox"/>	1 918		0619	0100	0	0203		E MOD	
<input type="checkbox"/>	2 918		0619	0100	0	0202		E MOD	
<input type="checkbox"/>	3 918		0619	0100	0	FTE		S MOD	
<input type="checkbox"/>	4 918		0619	0100	0	POS		S MOD	
<input type="checkbox"/>	5 918		0619	0100	0	0104		E MOD	
<input type="checkbox"/>	6 918		0619	0100	0	0129		E MOD	
<input type="checkbox"/>	7 918		0619	0100	0	0201		E MOD	

Step 7. Enter the amounts that should be revised for the chart of accounts elements selected by quarter in the **Q1 –Q4 Revision columns**.

Type	Q1 Revision	Q2 Revision	Q3 Revision	Q4 Revision	Revision Total
MOD	2,475	2,475	2,475	2,475	9,900
MOD	2,689	1,860	1,860	1,395	7,804
MOD	1	1	1	1	4
MOD	1	1	1	1	4
MOD	16,137	13,832	13,832	11,527	55,328
MOD	400				400
MOD	1,265	1,058	1,058	882	4,263

Step 8. Enter an explanation for this revision in the **Justification Line Text column**. The information typed into this field will display in the **Objective** field on the top of Form 8. The justification should be entered only once for an Appropriation Class, Function, Fund and Appropriation Unit combination. If entered more than once, the justification will populate multiple times on the same Form 8.

The image shows a software interface for entering justification text. At the top, there is a header bar with the text "Justification Line Text" and three small icons (a square, a document with a pencil, and a square). Below the header is a large, empty text input area. A red arrow points upwards from the bottom of this input area. Below the input area, there is a blue bar containing the text "To move budget authority from in-state trav".

Step 9. Click **Save** and the **Action was Successful** message will display.

FORM 9 – POSITION CHANGES TAB

If a revision requires changes to personnel costs that affect salaries, you must use the **Form 9 Position Changes tab** to ensure the Form 9 automatically generated during the revision process will agree to the total personnel costs in the Operations Plan at the agency level.

The **Position Change Tab** is used along with the Salaries Benefits Forecasting System (SBFS) projections commonly referred to as the SBFS Data Dump Report. However, you must run the SBFS report through infoAdvantage (see the section for Running Reports through infoAdvantage).

The SBFS projection projects salaries (including longevity and merit raises, if eligible), Social Security (FICA) and Medicare (OASDI), Retirement and Insurance. The projection DOES NOT calculate overtime costs, subsistence pay, termination costs or FICA on instate travel, so be sure to include these planned expenditures, if necessary, on the Form 8 Operations Plan tab.

Make note that the **ONLY** way to change Object 0104 is through the Position Change tab. Just adding an amount on the Form 5 will cause the infoAdvantage generated Form 6 to not be in agreement with the Form 5 in total.

1. Select the **Form 9 Position Changes** Tab.



A. REMOVE AN EMPLOYEE

2. To remove an employee, click on **Add Existing Position**.



The **Assigned or Vacant Position Search** screen displays.

Assigned or Vacant Position Search

Position Code: Employee Code: Employee Classification:

Employee First Name: Employee Last Name:

Display

Step 3. Enter any of the identifying information followed by a wildcard (*) for the specific employee you wish to remove from the particular chart of accounts using the following fields: Position Code, Employee Code, Employee classification, Employee First Name, or Employee Last Name then click [Search](#).

Step 4. Click on the box next to the employee, then click [Select](#)  and the employee data will populate in the **Form 9 Position Changes** tab. Note that the employee's chart of account information populates in the form.

Step 5. Update the **Type** field.

Appropriation Unit	Type
0	0

The **Type** field is used to either add a new line in the Operations Plan (NEW) or modify (MOD) an existing line in Operations Plan. If you are unsure whether a line exists in the Operation Plan, run the AFIN-BUD-013 (formerly P421) Report in infoAdvantage. This report reflects the department's current Operations Plan and allow you to determine if the **Type** field in the revision for Personnel Costs should be NEW or MOD.

Step 6. Right click in the **Type** field, then click [Search](#)  for the **Type** options to appear.

Type Search

Code: Name: Short Name: * Element

[Parent Type:](#)

Display Items

	Code	Name	Short Name	Element Type
Select	NEW	New Line	New Line	COA
Select	MOD	Modify Line	Modify Line	COA

Step 7. Select the appropriate **Type**, New Line or Modify Line, to populate in the form.

Summary					
<input type="checkbox"/>	Appropriation Class	Function	Fund	Appropriation Unit	Type
<input checked="" type="checkbox"/>	640	0421	0101	0	MOD

Step 8. Next, enter a negative 1 (-1) in the **Count** field to remove the employee.

Classification	Step	Category	Funding Start Date	Funding End Date	FTE	Count	Salary Percentage
10613	08				1	-1	100

Step 9. Enter the necessary information for the **Funding Start Date** and **Funding End Date** that corresponds to the employee’s last date of employment or the date for which you are moving an employee to another chart of account element.

Funding Start Date	Funding End Date
10/01/2016	12/31/2016

STAARS BUDGETING DEFAULT SETTING - Without designating the specific Funding Start Date and Funding End Date when working with Position Line Changes, STAARS Budgeting will default employee changes for the entire year. If the goal is to remove an employee for a partial year, specific dates must be entered.

Step 9. Once all of the required information has been entered click **Calculate**. Note the calculated salary and total cost fields are updated to reflect the changes.

Buttons: Calculate, Refresh, New Position, Add Existing Position, Copy Item, Delete Item, Export, Import, Sort..., View as CSV

Salary Percentage	Benefit Percentage	Calculated Salary	Current Salary	Cost
100	100	-60,898.102008		-85,668.104918

B. ADD AN EMPLOYEE OR NEW POSTION

Step 10. To ADD a new hire or add an existing employee to a new chart of account combination, click **New Position**. A new line will be added to the **Form 9 Position Changes tab**.

CGI Advantage

Save Back

Edit Budget Request | Form 8 Operations Plan | Form 8 Source of Funds | **Form 9 Position Changes** | Revision Justification | Document Management

Budget Request Summary

Layout Code: BUDGET REVISION | Layout Type: Generic | Request Code: 066 OP REVISION 2 | Request Name: 066 OP Revision 2 | Stage: 1 | Department: 066

Buttons: Calculate, Refresh, New Position, Add Existing Position, Copy Item, Delete Item, Export, Import, Sort..., View as CSV

Appropriation Class	Function	Fund	Appropriation Unit	Type	Pos No.	Emp No.	Classification	Step	Category	Funding Start Date	Funding End Date	FTE
918	0738	0399	0	MOD	2616100-066-0170	0000037220	10517	18		04/01/2016	09/30/2016	

Totals:

Page 1 of 1 | Show 20 rows per page | Rows 1 - 2 of 2

Step11. Enter the chart of account elements (Appropriation Class, Function, Fund, and Appropriation Unit, if applicable) for the proper grouping in which you wish to add the new or existing employee.

Step 12. In the **Type** field, select the appropriate **Type (NEW or MOD)**.



Step 13. In the **Classification** field, right click and then click **Search**.

Step 14. The **Classification Search** page will display. Click **Search** again.

Classification Search

Classification Search

Code: Name:

Search Cancel

Display 20 Items Sort...

	Code	Name
Select	10613	SENIOR ACCOUNTANT
Select	10613T	SENIOR ACCOUNTANT
Select	10613F02	ACCOUNTANT III - AOC
Select	10613S	SR ACCT (AGENCY 099)

Step 15. Using the wildcard (*), search for the classification by **Code** or **Name** of the new hire or employee you are adding. Example: 10613*

Step 16. Select the **Classification**, and the data will populate in the **Form 9 Position Changes** tab.

STAARS BUDGETTING DEFAULT SETTING - For a new hire starting at a step greater than Step 1, you must identify the beginning step. If left blank, the system will default to the first step in which the salary range begins for this classification.



Step 17. In the **Step** field, right click, then click **Search**.

Step 18. The **Step Search** screen will display, click **Search** again for the list to populate. Select the appropriate step.

Step Search

Code: Name:

Display Items

Item Page: **1** 2

	Code	Name
Select	29	DIFF 29
Select	CV	CONVERSION
Select	30	STEP 30
Select	31	STEP 31
Select	32	STEP 32
Select	33	STEP 33
Select	34	DIFF 34
Select	35	DIFF 35

Step 19. Next, you will need to select the proper retirement category. In the **Category** field, right click

Favorites	
Code	Short Name
Search...	

then click **Search**

Step 20. The **Category Search** screen will display. Click **Search** and the categories will display.

	Code	Name
Select	DEFAULT	Default Benefits
Select	NO BENEFITS	No Benefits
Select	TIER 1- TEACHERS	Tier 1- Teachers
Select	TIER 2- TEACHERS	Tier 2- Teachers
Select	TIER 1- ALL OTHER	Tier 1- All Other State Agencies
Select	TIER 2- ALL OTHER	Tier 2- All Other State Agencies
Select	TIER 1- LAW ENFORCE	Tier 1- Law Enforcement
Select	TIER 2- LAW ENFORCE	Tier 2- Law Enforcement
Select	TIER 1- JUDICIAL	Tier 1- Judicial
Select	TIER 2- JUDICIAL	Tier 2- Judicial

Step 21. Select the appropriate category to calculate the desired retirement and insurance benefits. Once selected the data will populate in the tab.

STAARS BUDGETING DEFAULT SETTING - Without designating the specific **Funding Start Date** and **Funding End Date** when working with Position Line Changes, STAARS Budgeting will default employee changes for the entire year. If the goal is to remove an employee for a partial year, specific dates must be entered.

Funding Start Date	Funding End Date
10/01/2016	12/31/2016

Step 22. In the **FTE** field, enter the desired FTE percentage:

FTE	Count	Salary Percentage
1	1	100

- 1 for a full-time employee
- .75 for a 75% part-time employee
- .50 for a 50% part-time employee
- .25 for a 25% part-time employee
- Or any other desired FTE percentage

Step 23. In the **Count** field, enter the number of employees that will be hired at this rate.

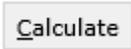
FTE	Count	Salary Percentage
1	1	100

Step 24. In the **PT or FT** field, right click then click **Search**  to select the code for full time or part-time employee.

Step	PT or FT	Category	Funding Start Date
------	----------	----------	--------------------

Step 25. In the **Salary Percentage** field you will need to key the equivalent percent for the FTE keyed (Step 22). If nothing is entered, the system will automatically calculate at 100%.

FTE	Count	Salary Percentage
1	1	100

Step 26. Once all fields have been added, click **Calculate** .

Step 27. Click **Save**  and determine if the **Action was Successful**.

NOTE:

Because the old Operations Plan Application was used to enter your Operations Plan for FY2016, STAARS Budgeting does not have the data to produce a complete or revised Form 9 that you will use throughout

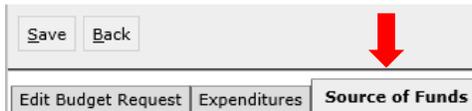
fiscal year 2016. It is not a requirement to manually complete and provide a Form 9 with each revision. However, for record keeping purposes at the department, you may decide to keep documentation of all personnel changes made through revisions in STAARS Budgeting. STAARS Budgeting will reflect changes made, but a full report will not be available.

The same process would need to be followed to add an employee that is being moved from another set of chart of accounts elements. Because the employee is actually assigned to certain chart of account elements, you may remove the specific employee, but a specific employee may not be added to a different chart of accounts grouping and must be added using the classification. Therefore, when removing specific employees, be sure to make note of the classification, grade, step, and category when adding back the employee. This will ensure that amounts removed from one set of chart of accounts elements is the same amount added to a different set of chart of accounts elements.

To make adjustments for a promotion, REMOVE the specific employee for the dates desired, then create another line to ADD the employee back using the new classification, step, category and appropriate dates, along with the chart of account element combination the employee needs to be budgeted in.

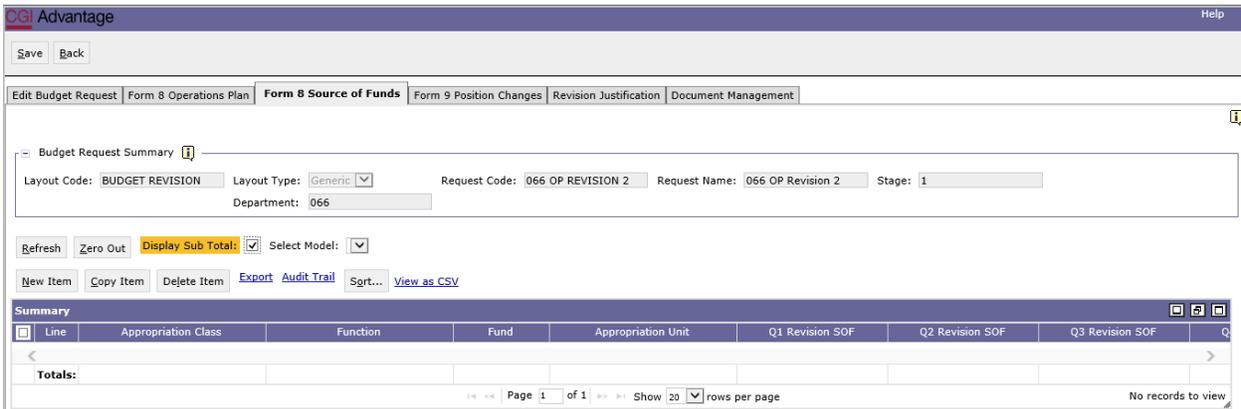
The SBFS projections does not project any type of raises for non-merit employees. Therefore, to adjust the salaries for non-merit employees and all corresponding benefits you will need to use the Form 9 Position Changes tab to remove the employee at the old rate and return them to the budget request at the new rate.

FORM 8 SOURCE OF FUNDS TAB

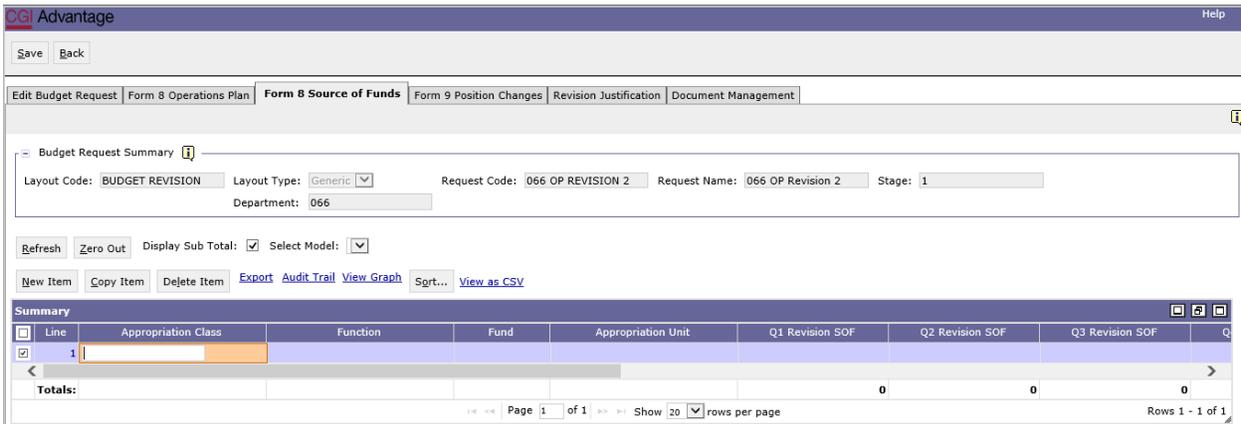


If all changes have been made both for Expenditures by Object on the Form 8 Operations Plan tab and the Form 9 Position Changes tab, you are now ready to complete the Source of Funds.

Step 1. Select the **Form 8 Source of Funds** tab.



Step 2. Click **New Item** to insert a line for each fund used for the department expenditures



Step 3. Enter the **Appropriation Class** and **Function** if known or right click to Search.

Step 4. In the **Fund** column right click to search for available funds. Click **Search** the **Fund Search** screen will appear, click **Search** again for the list of funds to emerge. Select the fund code that corresponds with the source of fund(s) required for the revision.



All Sources of Funds available for your agency will display. To narrow down the Sources of Funds, in the Code field enter the 4-digit fund number followed by a wildcard (*).

Step 5. Click [Search](#).

Fund Search

Code: 0100* x Name: Short Name: * Element Type: Parent Fund: Financial Rollups Information Category: Search Cancel Display 20 Items Sgrt... Item Page: 1 2 Items 1-20 of 38

	Code	Name	Short Name	Element Type	Parent	Department
Select	0100-201	State General Fund - Transfer from Legislative Building Aut	ST Gen Fd-Trans	COA		
Select	0100-203	State General Fund - Capital Outlay	ST Gen Fd-Capit	COA		
Select	0100-213	State General Fund - Administrative Costs	ST Gen Fd-Admin	COA		
Select	0100-214	State General Fund - Dependent Claims	ST Gen Fd-Depen	COA		
Select	0100-224	State General Fund - Transfer from 21st Century Fund	ST Gen Fd-Trans	COA		

Step 6. Select the desired **Source of Funds** and it will populate in the tab.

Form 8 Source of Funds

Budget Request Summary: Layout Code: BUDGET REVISION Layout Type: Generic Request Code: 066 OP REVISION 2 Request Name: 066 OP Revision 2 Stage: 1 Department: 066

Refresh Zero Out Display Sub Total: Select Model: New Item Copy Item Delete Item Export Audit Trail View Graph Sgrt... View as CSV

Summary	Line	Appropriation Class	Function	Fund	Appropriation Unit	Q1 Revision SOF	Q2 Revision SOF	Q3 Revision SOF	Q4 Revision SOF
	1	551	0275	0100-230					
Totals:						0	0	0	0

Page 1 of 1 Show 20 rows per page Rows 1 - 1 of 1

Step 7. Enter the **Appropriation Unit**, if applicable, then enter the totals by quarter for that **Source of Funds**.

NOTE: You MUST enter a Source of Funds EVEN IF the amounts per quarter are -0-.

Step 8. Once all Sources of Funds have been entered on the tab, click [Save](#)  to exit. **Action was Successful** will appear.

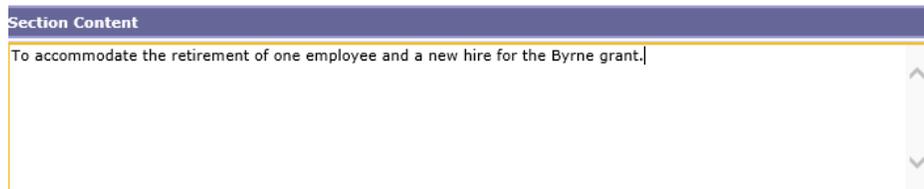
Follow these steps to enter Sources of Funds for all chart of account combinations entered on the Form 8 Operations Plan tab.

REVISION JUSTIFICATION TAB

Step 1. Select the **Revision Justification** tab.



Step 2. Enter the reason for the revision in the **Section Content** box. This tab populates the justification on the 101 Form (if necessary).



Step 3. Click **Save**  and determine if the **Action was Successful**.

Step 4. Now, you are ready to generate the infoAdvantage Report that will create Forms 8, 9 and 101 (if necessary). Log into the infoAdvantage website. To run the reports, see the STAARS infoAdvantage manual.

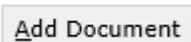
DOCUMENT MANAGEMENT TAB

All reports created in infoAdvantage will need to be attached in the appropriate form using the following steps.

Step 1. Select the [Document Management](#) tab.

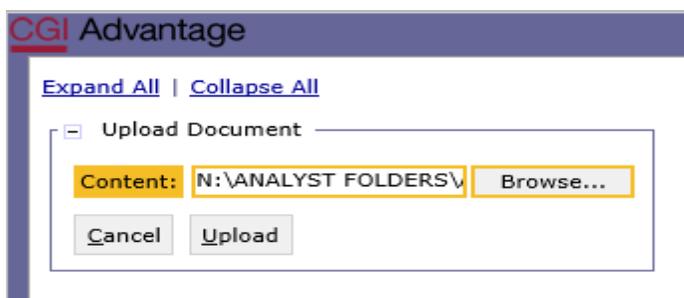


Step 2. Click [Add Document](#).

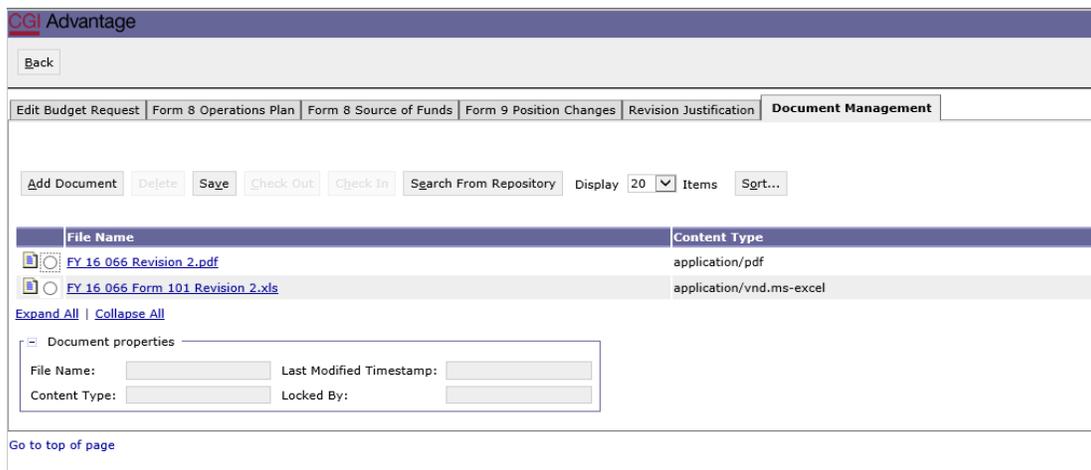


The following screen will display.

Step 3. Click [Browse](#) to locate your saved files. Select your file which will populate in the Content: box.



Step 4. Click [Upload](#). As your documents are attached to the form, they will display below.



NOTE: Please be sure to include ALL documentation required to be attached for the Operations Plan or in the Document Management tab using PDF format. Other documentation could be grant award letters, program change letters, etc.

Please use a similar format for naming these additional documents, examples:

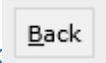
FY 16 066 Revision 2 Program Change Letter

FY 16 066 Revision 2 Grant Awards

FY 16 066 Revision 2 Other Support

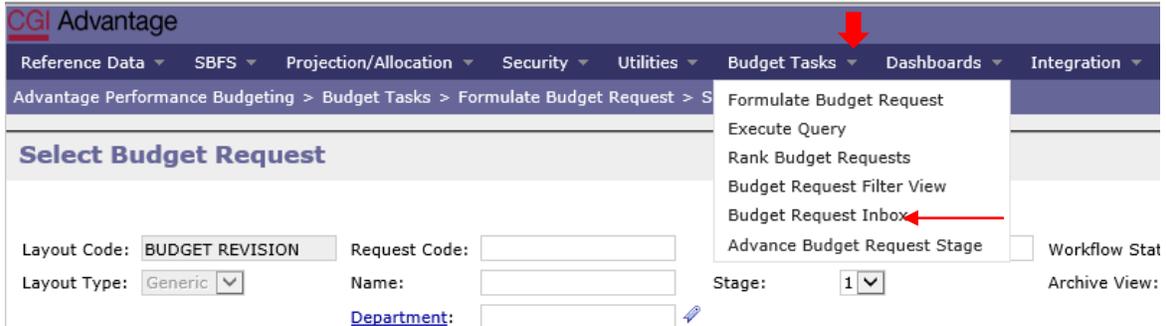
Step 5. When all required forms have been attached in the **Document Management** tab, click on the **Edit Budget Request** tab.

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

Step 7. Click **Back**  to exit out of the form.

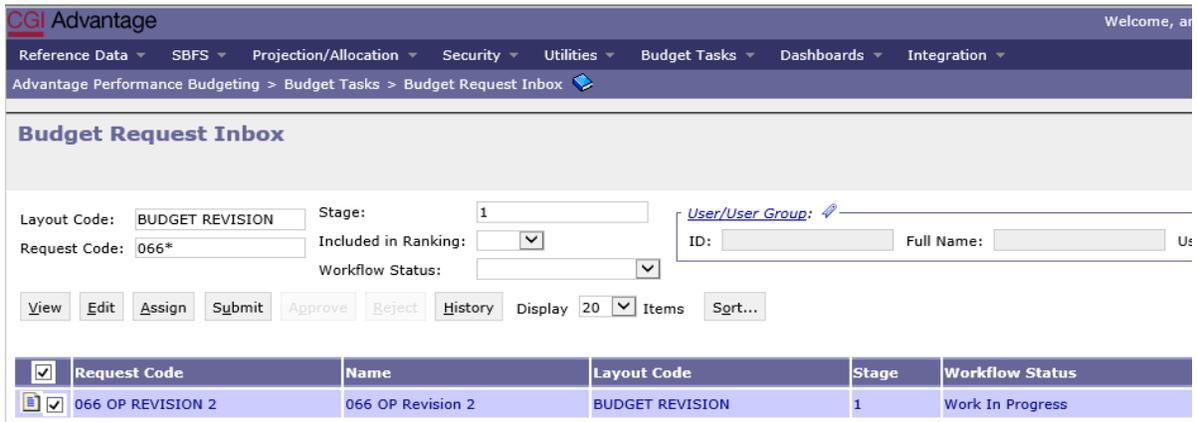
SUBMISSION

To submit the final Budget Revision Packet return to the **Budget Tasks** drop down menu.



Step 1. Select **Budget Request Inbox**. The **Budget Request Inbox** will display.

Step 2. Select the Budget Revision that is ready to be submitted. Note the action buttons that light up: View, Edit, Assign, and Submit.



Step 3. Click **Submit**. The following screen displays, allowing you to add comments for the 1st Approver.

CGI Advantage

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox > Submit Budget Request

Submit Budget Request

Comments:

Summary

Step 4. Click **Confirm**. You will be taken back to the **Budget Request Inbox** and receive a message that the budget revision was **Successfully Submitted** to the 1st approver. Each document submitted will be identified by the name given during preparation.

CGI Advantage

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Inte

Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox 

 BF3143 The Budget Request '066 OP REVISION 2' successfully submitted 

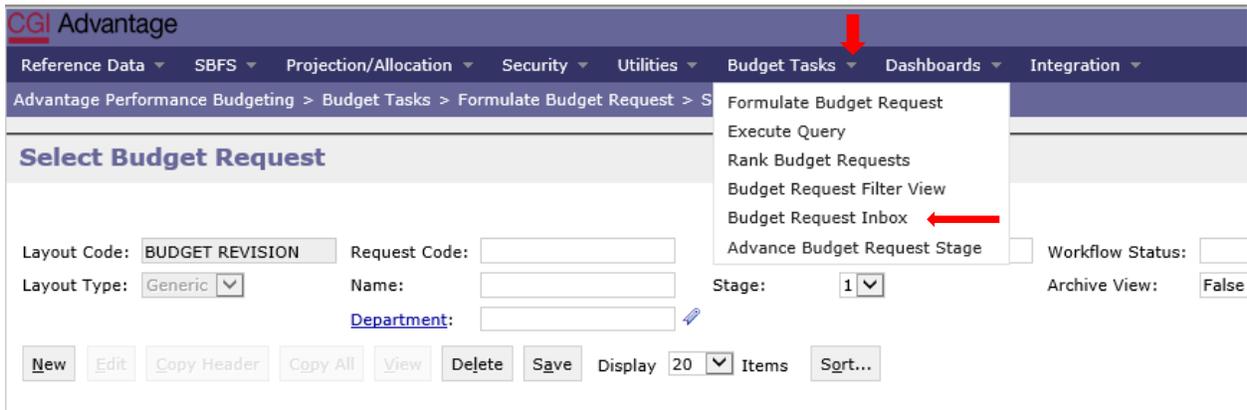
Budget Request Inbox

WORKFLOW

The 1st approver will receive an email. The email will include the comment along with a link to STAARS Budgeting.

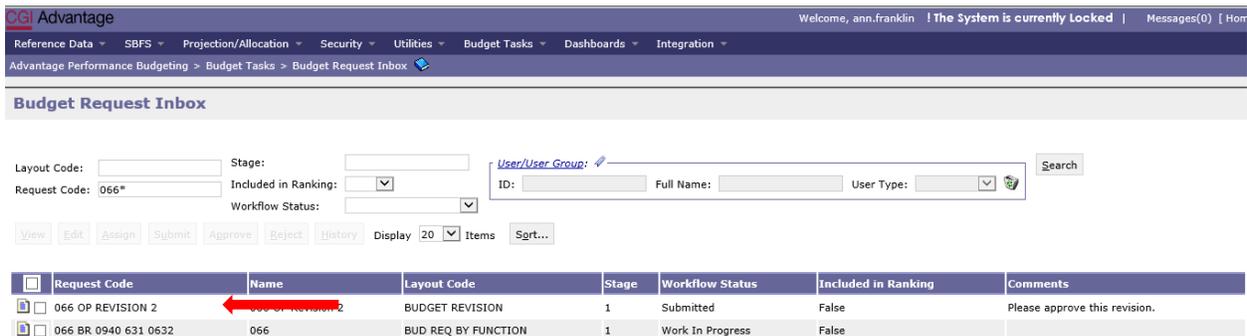
Please approve this revision. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

Step 1. Clicking the link will bring up the sign in page for STAARS Budgeting. The 1st approver will need to open their **Budget Request Inbox** under **Budget Tasks**.



The screenshot shows the 'Formulate Budget Request' dropdown menu in the CGI Advantage system. The menu items are: Formulate Budget Request, Execute Query, Rank Budget Requests, Budget Request Filter View, Budget Request Inbox (highlighted with a red arrow), and Advance Budget Request Stage. The background shows the 'Select Budget Request' page with various search filters and a toolbar.

Step 2. The 1st approver will need to **select the revision**.



The screenshot shows the 'Budget Request Inbox' page. It features search filters for Layout Code, Request Code, Stage, and User. Below the filters is a table of budget requests. The first row is highlighted with a red arrow pointing to the 'View' button.

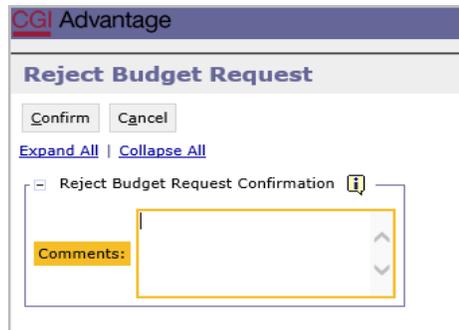
Request Code	Name	Layout Code	Stage	Workflow Status	Included in Ranking	Comments
066 OP REVISION 2	066 OP REVISION 2	BUDGET REVISION	1	Submitted	False	Please approve this revision.
066 BR 0940 631 0632	066	BUD REQ BY FUNCTION	1	Work In Progress	False	

Step 3. To review the revision, click **View**.



Step 4. After review, if the documents need editing, the 1st approver will need to click **Reject**. The following screen will appear.

Reject



Step 5. Use the **Comments** section to describe why the documents were rejected.



Step 6. Click **Confirm**. This will send the budget revision back to the person that submitted it to the 1st approver. The submitter will receive an email that includes the comment and a link to STAARS Budgeting to open the document and make the necessary corrections.

Confirm

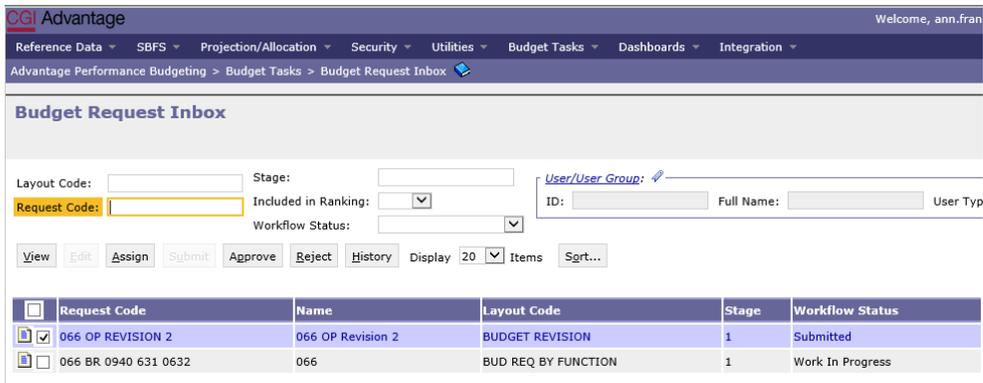
We also need to move funds from object 0800 to object 0900 in Fund 0399 for Fund 0275. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

NOTE: The submitter should make the required changes in STAARS Budgeting, rerun the reports in infoAdvantage and attach updated error reports (with no mismatch message) using the **Document Management** tab. The process should take place anytime corrections are to be made for a Budget Request, Operations Plan or Budget Revision. Then, the submitter can resubmit the Packet(s) to the 1st approver.

Step 7. Once the 1st approver receives the corrected Budget Revision, reviews and determines that the Packet is satisfactory, the 1st approver can use the email received in Microsoft Outlook to follow the link

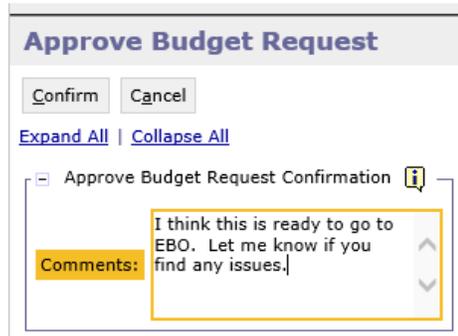
and now approve the Revision by clicking **Approve**.

Approve



Step 8. The **Approve Budget Request** screen displays allowing for **Comments** to be sent to the 2nd approver.

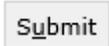
Step 9. Click **Confirm**  to approve the budget revision.



Step 10. The 2nd approver will receive an email in Microsoft Outlook with a link to STAAR Budgeting to login and approve.

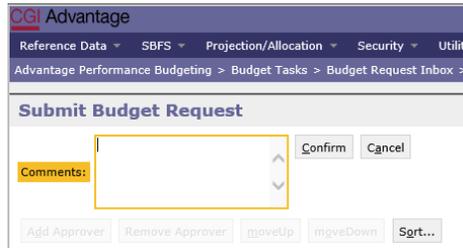
I think this is ready to go to EBO. Let me know if you find any issues. https://STAARS-SHR_ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

NOTE: The revision will stay in 1st approver's inbox until they **submit** the revision to the 2nd approver. **Step**

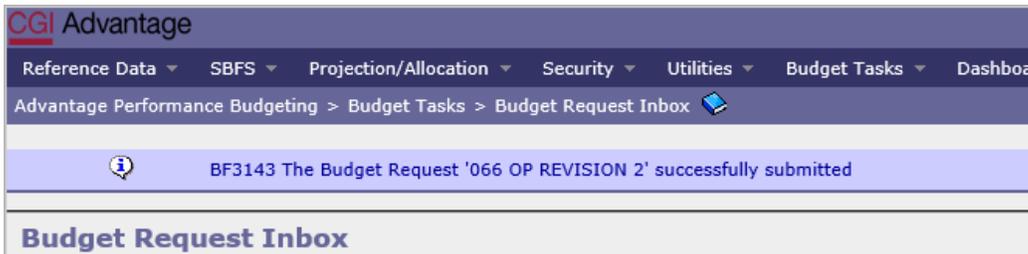
11. To submit the revision to the 2nd approver, select the revision again, then click **Submit** 

The **Submit Budget Request** screen displays.

Step 12. Click **Confirm**  to submit the budget revision.



Step 13. You will return to the **Budget Request Inbox** and a message displays that the Budget Revision was **Successfully Submitted**. The 2nd approver receives an email in Microsoft Outlook indicating that the Packet has been submitted.



ADDITIONAL OPTION - REJECTED

The 2nd approver also has the options, to View, Approve, or Reject a form. If rejected, the form(s) are returned to the 1st approver. After the 2nd approver has reviewed the form, the form(s) are ready to approve and submit to the Executive Budget Office.

Step 14. Select the form(s), then click **Approve**. 

CGI Advantage Welcome, ann.fran

Reference Data ▾ SBFS ▾ Projection/Allocation ▾ Security ▾ Utilities ▾ Budget Tasks ▾ Dashboards ▾ Integration ▾

Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox

Budget Request Inbox

Layout Code: Stage: [User/User Group: ↗](#)

Request Code: 066* Included in Ranking: ID: Full Name: User Typ:

Workflow Status:

Display 20 Items

<input type="checkbox"/>	Request Code	Name	Layout Code	Stage	Workflow Status
<input checked="" type="checkbox"/>	066 OP REVISION 2	066 OP Revision 2	BUDGET REVISION	2	Submitted
<input type="checkbox"/>	066 BR 0940 631 0632	066	BUD REQ BY FUNCTION	1	Work In Progress

The **Approve Budget Request** screen displays, allowing for **Comments**.

Step 15. Click **Confirm** to approve the form(s).

CGI Advantage

Approve Budget Request

[Expand All](#) | [Collapse All](#)

Approve Budget Request Confirmation

Comments:

NOTE: The form(s) remains in the 2nd approver's **Budget Request Inbox** until it is submitted to the Executive Budget Office.

Step 16. Select the form(s), then click **Submit**.

Advantage Performance Budgeting > Budget Tasks > Budget Request Inbox

Budget Request Inbox

Layout Code: Stage: [User/User Group: ↗](#)

Request Code: 066* Included in Ranking: ID: Full Name: User Typ:

Workflow Status:

Display 20 Items

<input type="checkbox"/>	Request Code	Name	Layout Code	Stage	Workflow Status
<input checked="" type="checkbox"/>	066 OP REVISION 2	066 OP Revision 2	BUDGET REVISION	3	Approved
<input type="checkbox"/>	066 BR 0940 631 0632	066	BUD REQ BY FUNCTION	1	Work In Progress

The **Submit Budget Request** screen displays.

Step 17. Enter any desired **Comments** for the Executive Budget Office, then click **Confirm**.



Step 18. You will return to the **Budget Request Inbox** and should have a message that the revision was **Successfully Submitted**.

The process to Submit has been Completed!



NOTE: If rejected by the Executive Budget Office, the form(s) will be returned to the 2nd approver for corrections. The 2nd approver will need to make the required changes, regenerate the reports in infoAdvantage and re-submit the form(s).