

Executive Budget Office

Performance Budgeting (PB) Manual for Quarterly Performance Reporting



For use by Alabama state agencies, boards, commissions, departments, and institutions to submit reports of quarterly performance (§41-19-11, Code of Alabama 1975).

Quarterly Performance Manual

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STAARS PERFORMANCE BUDGETING
QUARTERLY PERFORMANCE REPORTING
FOR ALL AGENCIES AND INSTITUTIONS

Welcome to STAARS Performance Budgeting! Performance Budgeting is the system of record for budgeting for the State of Alabama. The Quarterly Performance Report (QPR) is 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 PERFORMANCE BUDGETING (PB):

Access to two different areas of STAARS will be required. The QPR data will be completed in the 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 STAARS Support at 334-353-9000 or STAARS.Support@Finance.Alabama.gov for access.

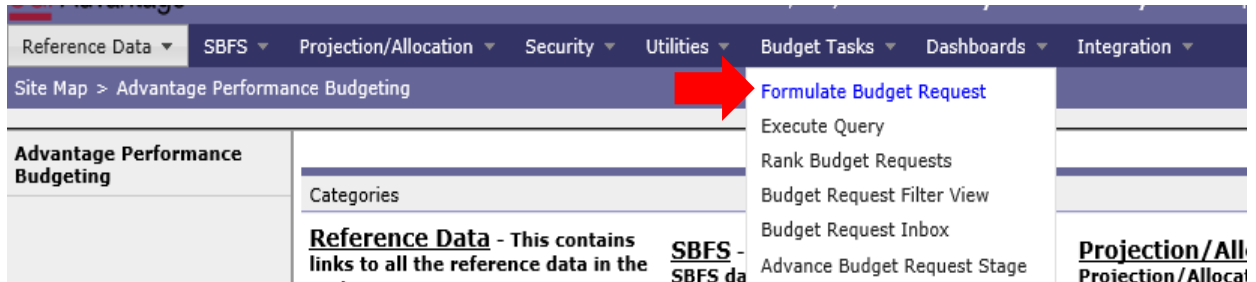
- To access Performance Budgeting (PB): <https://budget.staars.alabama.gov>
- To access reports in infoAdvantage : <https://staarsinfo.alabama.gov/BOE/BI>
- Agencies with access to STAARS Financials should access infoAdvantage through Financials.

*Please contact **STAARS Support** at **334-353-9000** or **STAARS.Support@Finance.Alabama.gov** for login or password assistance.

Quarterly Performance Report (TARGETS)

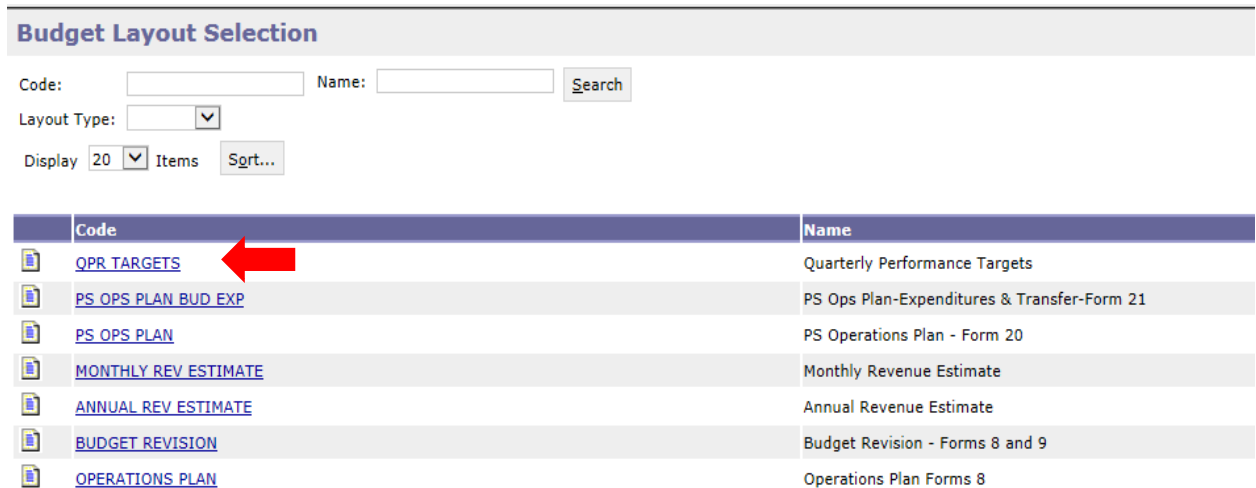
I. TARGETS

Step 1. Using the tool bar, click on **Budget Tasks**, then click **Formulate Budget Request** from the dropdown menu.



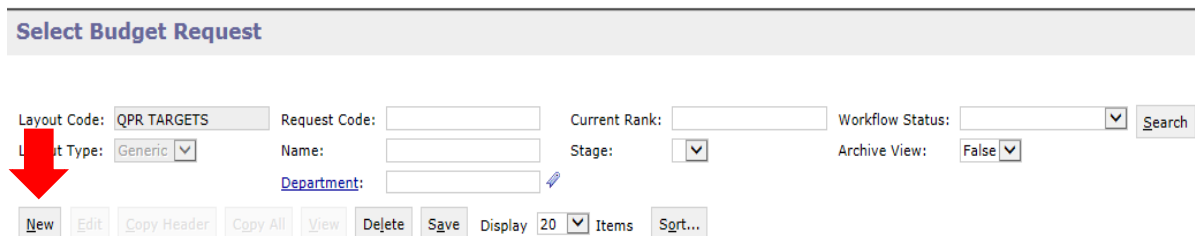
The **Budget Layout Selection** screen will appear.

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 QPR Target Form as follows:

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

REQUEST CODE EXAMPLE: 069 QPRT 2021

DEPARTMENT NUMBER: 069 QPRT

UPCOMING FISCAL YEAR: 2021

NAME: 069 QPRT 2021

Create Budget Request

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

Budget Request Details

* Request Code: 069 QPRT 20** * Name: 069 QPRT 20**

* Stage: 1

Description:

Ranking Type: [edit icon]

Ranking Type:

Budget Request Information

Dimensions

Department: 069 [edit icon]

[Go to top of page](#)

Step 5. Enter the **Department** number in the **Dimensions** section at the bottom of the header page.

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

OGI Advantage

[Save](#) [Back](#)

Action was successful.

Edit Budget Request | **QPR Targets** | **Document Management**

[Notify](#)

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

NOTE: There is no need to use the Document Management tab within Performance Measures. Documents (reports) will always be attached to the Operations Plan as a PDF. Since QPR does not move through workflow, if you chose to add documents to the Document Management tab, this would be a quick agency review before starting each quarterly report.

***IF THE QPR TARGET DATA FOR YOUR AGENCY DOES NOT POPULATE ON THE QPR TARGETS TAB, USE STEPS 7-9 TO POPULATE THE LINES. ***

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

Buttons: Refresh, Zero Out, Display Sub Total:
 Buttons: New Item, Copy Item, Delete Item, Export, Audit Trail, Sgrt..., View as CSV

Summary			
<input type="checkbox"/>	Line	PM Obj	Unit
		Totals:	

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

Summary		
<input type="checkbox"/>	Line	PM Obj
<input checked="" type="checkbox"/>	1	
		Totals:

Context Menu: Favorites, Code, Short Name, Search...

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

CGI Advantage

Budget Object Search

Code:

Parent Budget Object:

Buttons: Search, Cancel, Sort by User-Defined Order

Display 20 Items Sgrt...

Step 9. Enter your Agency number and asterisk * in Code Box. Click **Search** for the list of targets. Click **Select** for the target(s) to add.

CGI Advantage

Budget Object Search

Code: Name: Object Type: * Element Ty
 Parent Budget Short Name: Itemization
 Object: Name: Type:

Display Items

	Code	Name	Short Name	Object Type	Elemen
<input type="button" value="Select"/>	069-01	Incrs Number of Students Who Earn A Short-Term Or Long-Term	Incr # of Certi	Performance Measure	COA
<input type="button" value="Select"/>	069-02	Incrs The Number of Individuals Served In Adult Education.	Incr # serv adu	Performance Measure	COA
<input type="button" value="Select"/>	069-03	Conduct Peer Reviews at 12 Accs Institutions	Conduct peer re	Performance Measure	COA

Step 10. On the QPR Targets tab, enter the quarterly targets across **Quarter 1, Quarter 2, Quarter 3, and Quarter 4**. **NOTE:** The system will **NOT** automatically calculate the Annual Target column. **The Annual Target will need to be entered.**

PM Obj	Unit	Quarter 1 Target	Quarter 2 Target	Quarter 3 Target	Quarter 4 Target	Annual Target
069-01	Percentage					5
069-02	Percentage					5
069-03	Number					12
		0	0	0	0	22

Continue by entering as many targets desired for the department to report quarterly performance indicators.

Step 11. Once all targets have been included, click **Save** at the top of the page. **Action was Successful** will appear.

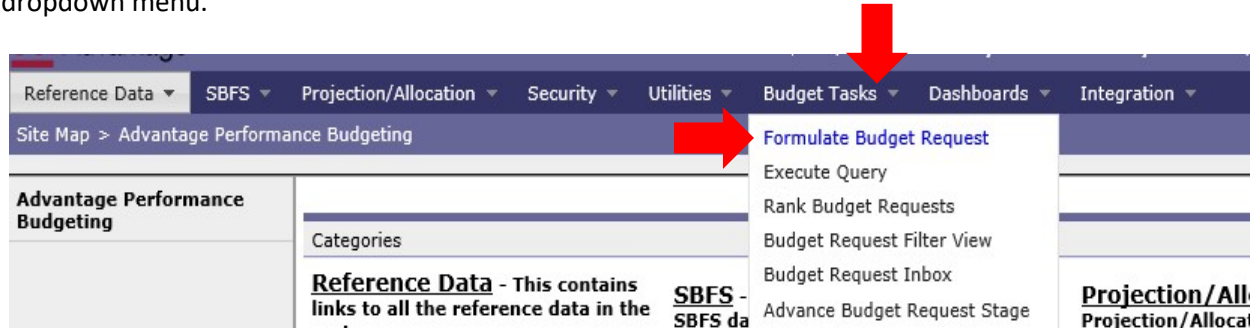
Proceed to page 12 for instructions on submission of information.

***DO NOT SUBMIT TO EBO THROUGH WORKFLOW IN PB**

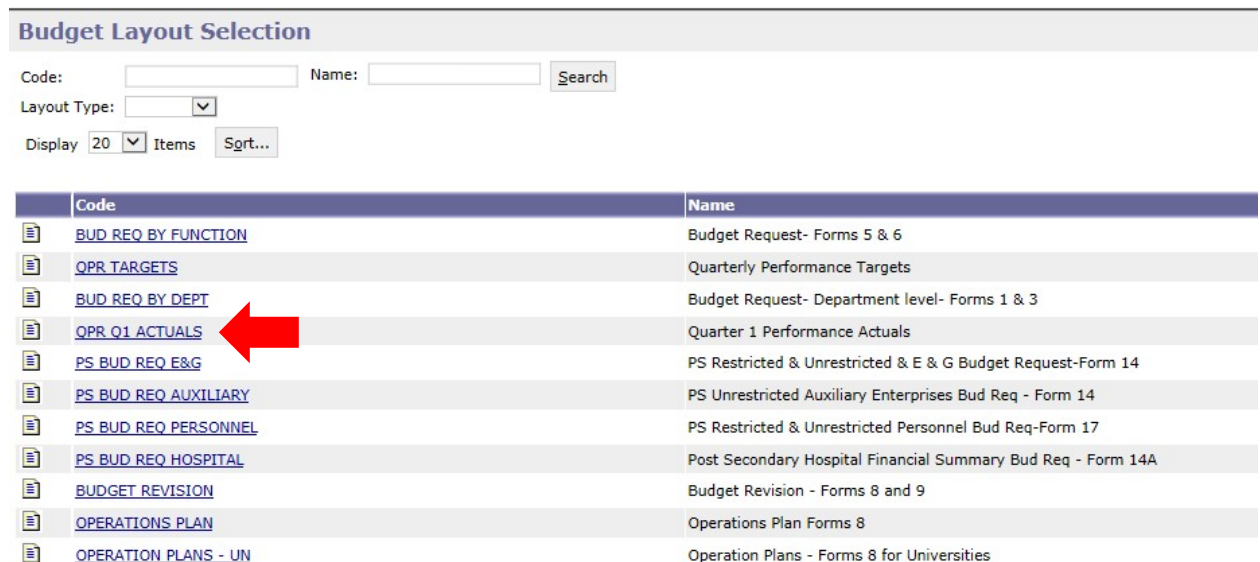
Quarterly Performance Report (ACTUALS)

II. ACTUALS

Step 1. Using the tool bar, click on **Budget Task**, then click **Formulate Budget Request** from the dropdown menu.

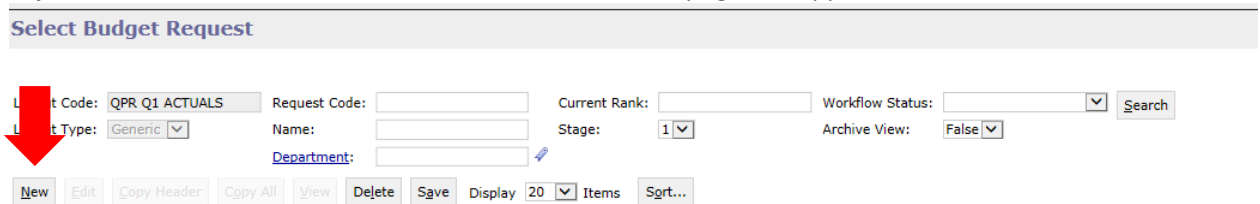


Step 2. From the **Budget Layout Selection** screen, select **QPR Q1 ACTUALS**. (*Each quarter will require a submission of actual amounts and the available Budget Layout will correspond to the quarter that is being reported.)



The **Select Budget Request** screen will appear.

Step 3. Click **NEW** to create the Actuals form. The Header page will appear.



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

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

REQUEST CODE EXAMPLE: 005 QPR1A 2020

NAME: 1st Quarter 2020

Request Code and Name will change to reflect the quarter that is being reported.

Step 5. Enter the **Department** number in the **Dimensions** section at the bottom of the header page.

Create Budget Request

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

Budget Request Details

* Request Code: 069 QPR1A 20** * Name: 1st Quarter 20**

* Stage: 1

Description:

Ranking Type:

Budget Request Information

Dimensions

Department: 069

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

CGI Advantage

Action was successful.

[Save](#) [Back](#)

Edit Budget Request | **QPR Q1 Actuals** | **Document Management**

[Notify](#)

Supplementary tabs will emerge that will allow you to enter the actual amounts for each performance measure. The tabs are: **QPR Q1 Actuals** and **Document Management**.

Step 7. All performance measures (PM) objectives, units of measure and targets previously identified should automatically appear. ****IF THE DATA HAS NOT PRE-POPULATED, CLICK UPDATE PRELOAD.**

Step 8. Enter the data for each objective in the **Quarter 1 Actuals** column.

Refresh	Zero Out	Update Preload	Display Sub Total: <input type="checkbox"/>		
New Item	Copy Item	Delete Item	Export Audit Trail Sort... View as CSV		
Summary					
<input type="checkbox"/>	Line	PM Obj	Unit	First Quarter Target 2016	Quarter 1 Actuals
<input checked="" type="checkbox"/>	1	005-01	Dollars	28,500,000	
Totals:				28,500,000	0



Step 9. Once all actuals data for each measure has been included, click **Save** at the top of the page. The **Action was Successful** message will appear.

Step 10. Generate the report in infoAdvantage using the **ABUD-QPR-001 Quarterly Performance Report**.

Click **Advanced** and use the following prompts:

- Enter Department: **3-Digit Agency Number**
- Run Report for CY or FY:
 - For quarterly reporting input **CY** (Current Year) in the prompt.
 - **Always use a capitalized CY.**
- Enter Performance Plan Code: **20** STATEWIDE AL**

Review the report for accuracy and if edits need to be made return to the Performance Budgeting application. If the report is accurate, you are finished. Print and retain copies for your records.

YOU HAVE SUCCESSFULLY COMPLETED ENTERING THE DEPARTMENT ACTUALS.

****DO NOT SUBMIT THROUGH WORKFLOW****

NOTE: You will never use the **Document Management** tab within Performance Measures. After each quarter, EBO will access all department reports and consolidate for reporting purposes.

SUBMISSION OF QUARTERLY PERFORMANCE TARGETS
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 you should EXPORT the report as a PDF and save the report to your PC. 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 Targets 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.

The screenshot shows a software interface with a blue header bar containing 'Advanced' and 'Run' buttons. Below the header are three input fields with blue labels: 'Enter Department(s):' containing '069', 'Run Report for CY or FY:' containing 'FY', and 'Enter Performance Plan Code:' containing '20** STATEWIDE AL'.

PROMPTS:

- Click Advanced.
- Enter Department Number: 3-digit Agency Number
- Run Report for FY:
 - For **QPR Target** submissions, input **FY (Future Year)** in the prompt.
- Search Performance Plan Code: 20** STATEWIDE AL

Quarterly (4) Submissions throughout the Fiscal Year

EBO will continue to send out reminders when Quarterly Performance Actuals are due. The QPR Actual forms will remain open for 30 days after each quarter ends. Agencies should log into Performance Budgeting 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 entered. *** 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 Targets Report that will be submitted with the Operations Plan:

Report ID: STAARS-QPR-0001	State of Alabama
Report Date: 4/30/20	Quarterly Performance Report
Report Time: 11:47:01 AM	Fiscal Year
Report ID: STAARS-QPR-0001	State of Alabama

Cover Page

Parameters and Prompts

Department(s): 038
 CY or FY: FY
 Performance Plan: 2020 STATEWIDE AL

Report ID: STAARS-QPR-0001	State of Alabama	Page 1 of 4
Report Date: 4/30/20	Quarterly Performance Report	
Report Time: 11:44:42 AM	Fiscal Year 2020	
Report ID: STAARS-QPR-0001	State of Alabama	

Department: 038 - Insurance

Mission: To serve the people of Alabama by regulating the insurance industry, providing consumer protection, promoting market stability, and enforcing fire safety standards and laws.

Vision: To be the recognized benchmark for departments of insurance throughout the nation in meeting the challenges of regulating a dynamic, diverse, and global industry and ensuring our citizens' protection from fire, fraud, and unfair business practices.

Annual Goals

01	Protect the public from unfair and illegal practices involving insurance by regulating persons engaged in the sale of insurance by providing counseling and assistance to the public and by monitoring compliance with state laws and through competent regulation of rates and policies for insurance and Preneed markets
02	To efficiently ensure that insurers and other regulated entities doing business in Alabama are financially sound and in compliance with applicable law.
03	Protect the public from loss of life and property due to fire or explosion.

01 - Complete the licensing process in prompt fashion.

Goal	Unit	First Quarter		Second Quarter		Third Quarter		Fourth Quarter		Annual	
		Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual
01	Licenses Processed in 3 Days	100		100		100		100		100	

MISSION, VISION, GOALS AND PERFORMANCE MEASURES

EBO recommends reviewing the Mission, Vision, Goals, and Performance Measures for accuracy. Changes can only be made when entering QPR Targets that are due with the Operation Plan submission. If changes are necessary for the Mission, Vision, Goals, or Performance Measures (Targets), review and **CONTACT YOUR BUDGET ANALYST** for any edits.

MISSION/VISION

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

CGI Advantage

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

Site Map > Advantage Performance Budgeting

Advantage Performance Budgeting

Categories

Reference Data - This contains links to all the reference data in the system.

SBFS - This contains links to all the SBFS data in the system.

[Consolidations](#) - This contains all the consolidation links.

[Dimensions](#) - This contains all the dimension links.

[Budget Forms](#) - This contains all the Budget Form links.

[Performance Budgeting](#) - This contains all the Performance Budgeting definition links.

[Budget Ranking](#) - This contains all the Budget Ranking definition links.

[Queries](#) - This contains links to Queries.

[Workflow](#) - The following are Workflow-specific links.

[Positions, Employees and Assignments](#) - This contains links to Positions, Employees and Assignments.

[Benefits and Supplemental](#) - This contains links to Benefits and Supplemental.

[Class, Category and Other](#) - This contains links to Class, Category and Other.

[Salary Tables](#) - This contains links to Salary Tables.

[Salary Projections](#) - This contains links to Salary Projection.

Utilities - Links to utilities.

Budget Tasks - This contains links to independent Views.

[Import / Export](#) - This contains links to all Import / Export data.

[Rollover](#) - This contains links to rollover.

[ECM](#) - This contains links to all ECM Integration data.

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

CGI Advantage

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting

Performance Budgeting

Pages

[Performance Missions](#)

[Performance Goals](#)

[Performance Objectives](#)

[Performance SubObjectives](#)

[Annual Performance Goals](#)

[Performance Measure Type Maintenance](#)

[Performance Plans](#)

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

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

Step 4. Select the code for your department.

Step 5. Click **VIEW** to verify the Performance Mission Detail Information.

Advantage Performance Budgeting > Reference Data > Performance Budgeting > Performance Missions Maintenance

Performance Missions Maintenance

Code: 038*

Display 20

<input checked="" type="checkbox"/>	Code
<input checked="" type="checkbox"/>	038-MISSION

Step 6. Under the **Performance Mission Detail Information** section, review the Mission and Vision of the department. The Mission and Vision are in the same location, continue scrolling down until you see the Vision statement.

Performance Mission Detail Information

Mission Text: 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

Performance Mission Detail Information

Mission Text: 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.

Step 7. Once complete, click **Performance Budgeting** in the Task Bar at the top of the page.

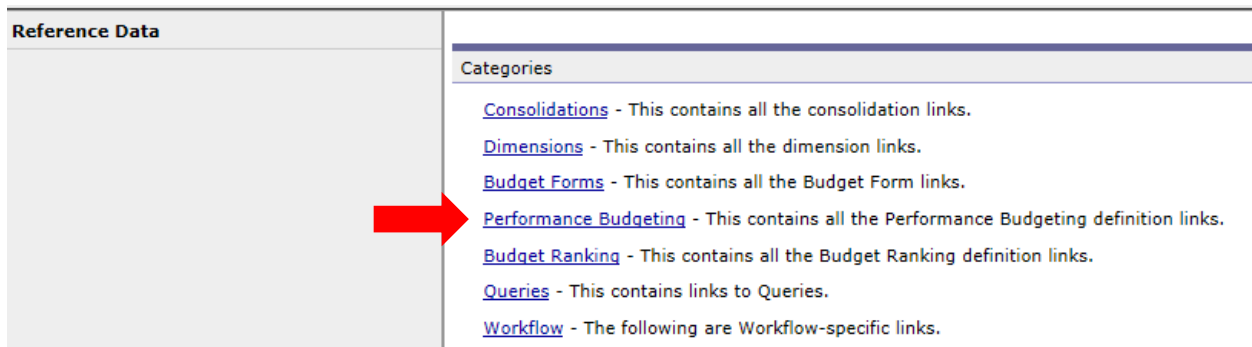
NOTE: *If changes need to be made for the Mission or Vision. *CONTACT YOUR BUDGET ANALYST

GOALS

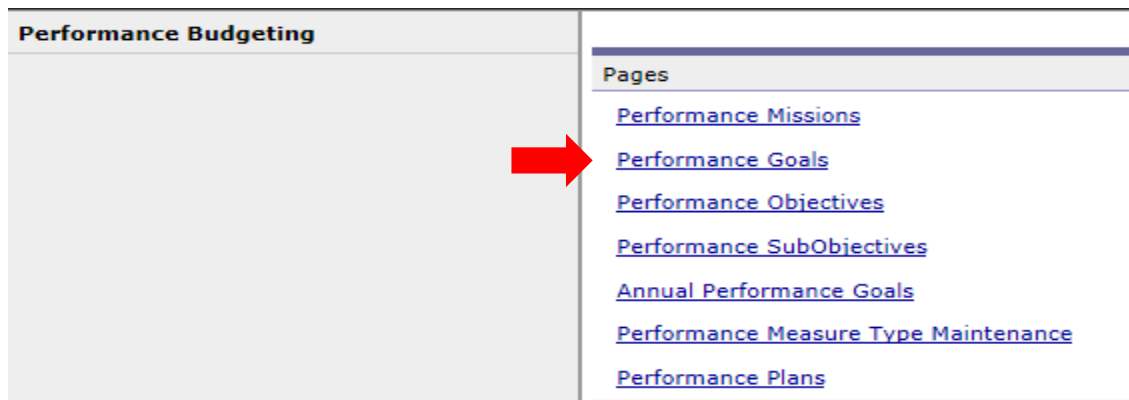
Step 8. Using the task bar at the top of the screen, return to the **Reference Data** screen.



Step 9. Select **Performance Budgeting** under the Categories section. The **Performance Budgeting** Screen will appear.



Step 10. From the **Performance Budgeting** screen, select **Performance Goals**.



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

CGI Advantage

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting >

Performance Goals Maintenance

Code: Name:

Display 20 ▾ Items

Item Page: 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 ▸ ▹

Step 11. In the **Code** field enter the **3-digit Department number** (include the asterisk). Click **Search**.

Step 12. Select the Goal for your department.

Step 13. Click **VIEW** to review the selected Goal. Check the information in the **Description** box for accuracy.

Performance Goals Maintenance

Code:

Display 20 ▾ Items

<input type="checkbox"/>	Code	Name
<input checked="" type="checkbox"/>	038-GOAL-001	Protect the public from unfair and illegal practices involi
<input type="checkbox"/>	038-GOAL-002	To efficiently ensure that insurers and other regulated enti
<input type="checkbox"/>	038-GOAL-003	Protect the public from loss of life and property due to fir

Performance Goal View

Performance Allocations

Milestones

Documentation

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

[-] Basic Information ⓘ

Code: 038-GOAL-001

Security Organization: DEPT-038

Name: Protect the public from

Short Name: Protect the pub

Description: Protect the public from unfair and illegal practices involving insurance by regulating



Initiator:

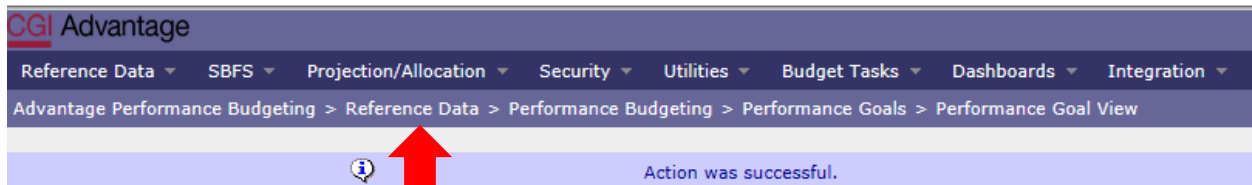
[-] Detail Information ⓘ

****IF CHANGES NEED TO BE MADE FOR ANY OF THE GOALS, CONTACT YOUR BUDGET ANALYST. ****

Step 14. Once complete, return to Reference Data in the task bar at the top of the screen.

PERFORMANCE MEASURES

Step 15. Using the path at the top of the screen, return to the **Reference Data** screen.



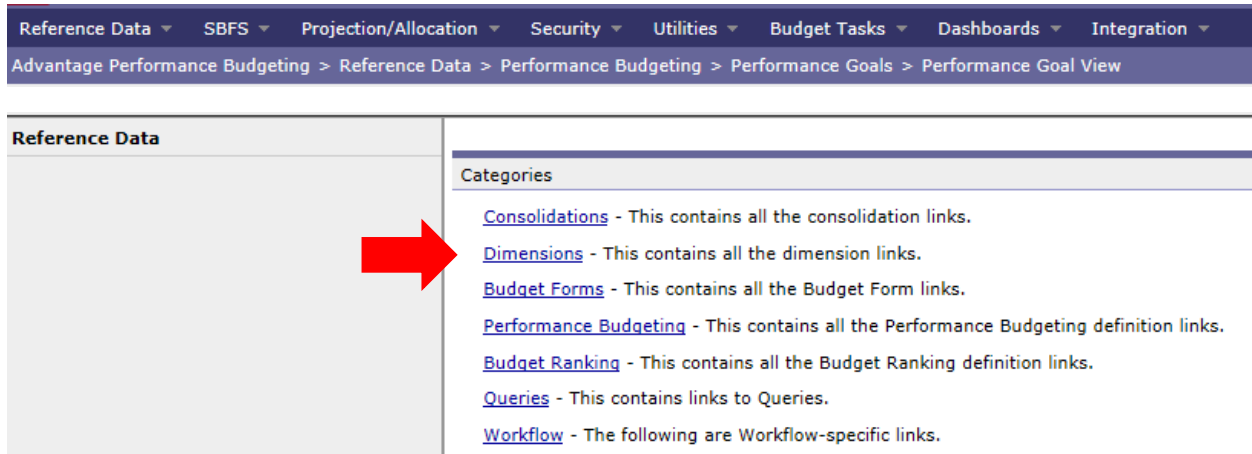
CGI Advantage

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting > Performance Goals > Performance Goal View

Information icon: Action was successful.

Step 16. Select **Dimensions** under the Categories section.



Reference Data

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting > Performance Goals > Performance Goal View

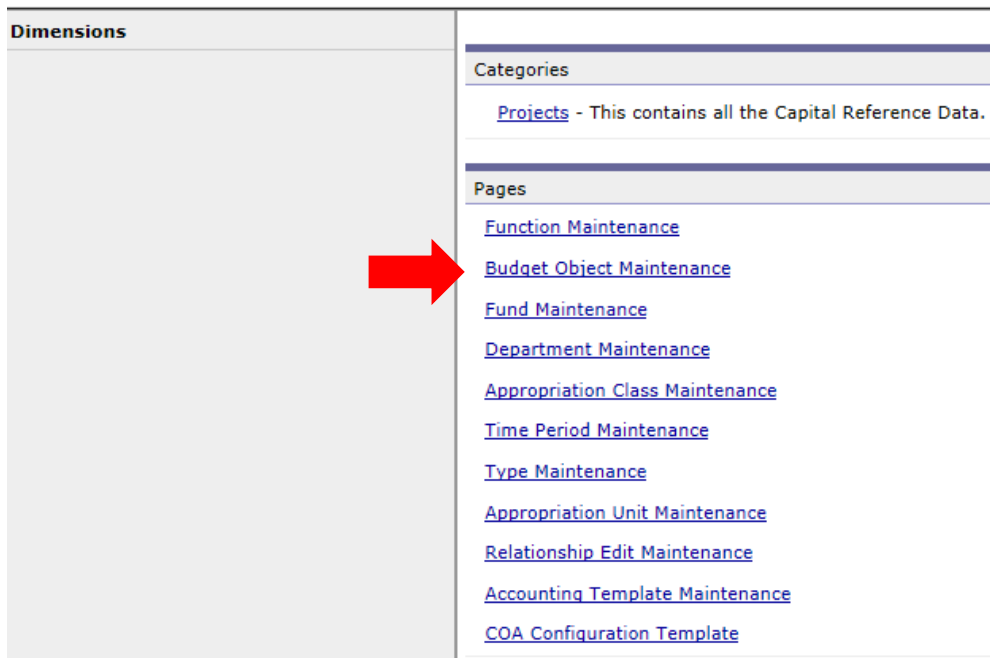
Reference Data

Categories

- [Consolidations](#) - This contains all the consolidation links.
- [Dimensions](#) - This contains all the dimension links.
- [Budget Forms](#) - This contains all the Budget Form links.
- [Performance Budgeting](#) - This contains all the Performance Budgeting definition links.
- [Budget Ranking](#) - This contains all the Budget Ranking definition links.
- [Queries](#) - This contains links to Queries.
- [Workflow](#) - The following are Workflow-specific links.

The **Dimensions** screen will appear.

Step 17. From the **Dimensions** screen, select **Budget Object Maintenance**.



Dimensions

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

Advantage Performance Budgeting > Reference Data > Performance Budgeting > Performance Goals > Performance Goal View

Categories

- [Projects](#) - This contains all the Capital Reference Data.

Pages

- [Function Maintenance](#)
- [Budget Object Maintenance](#)
- [Fund Maintenance](#)
- [Department Maintenance](#)
- [Appropriation Class Maintenance](#)
- [Time Period Maintenance](#)
- [Type Maintenance](#)
- [Appropriation Unit Maintenance](#)
- [Relationship Edit Maintenance](#)
- [Accounting Template Maintenance](#)
- [COA Configuration Template](#)

Step 18. In the **Budget Object Maintenance** screen, enter the department code (include the asterisk) in the **Code** box.

Click **Search**.

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

Step 19. Select the performance measure you wish to review. Click **VIEW**.

Budget Object Maintenance

Code: Name: Short Name: E
Usage: Postable: [Parent Budget Object:](#)

Display

<input type="checkbox"/>	Code	Name	Short Name
<input checked="" type="checkbox"/>	038-01	Complete The Licensing Process In Prompt Fashion.	Complete the li
<input type="checkbox"/>	038-02	To Respond In A Timely Fashion To Consumer Inquiries and Com	to respond in a
<input type="checkbox"/>	038-03	Provide Access to Markets For The Newest Insurance Products	Provide access

Step 20. The screen will appear with details of the performance measure. Review the **Name** and **Description**.

****IF CHANGES NEED TO BE MADE FOR ANY OF THE PERFORMANCE MEASURES, CONTACT YOUR BUDGET ANALYST. ****

****IF ANY ADDITIONAL PERFORMANCE MEASURES NEED TO BE ADDED, CONTACT YOUR BUDGET ANALYST**.**