2022

Performance Budgeting Manual

For Postsecondary Institutions

Executive Budget Office

Table of Contents

Overview....2

Header Page....3

PS BUD REQ E&G....4

Expenditures by Function Tab....7

Expenditures by Object Tab....8

Employer Costs – Fringe Benefits Tab....9

Condition of Current Funds Tab....10

PS BUD REQ Auxiliary Tab....12

Auxiliary Revenues Tab....14

Auxiliary Expenditures Tab....15

Auxiliary Transfers....16

PS BUD REQ Personnel....18

Education & General (E&G) Personnel by Function Tab....21

Education & General (E&G) Personnel by Occupational Activity Tab....22

Auxiliary Enterprise by Occupational Activity Tab....23

PS BUD REQ Hospital....24

Hospital Revenues....27

Hospital – Expenditures, Transfers & Accounts....28

Hospital – Personnel Tab....31

Document Management Tab....32

Submission....33

Workflow....34

PERFORMANCE BUDGETING

BUDGET REQUEST MANUAL

FOR POSTSECONDARY INSTITUTIONS

Welcome to STAARS Performance Budgeting! Performance Budgeting is the system of record for budgeting for the State of Alabama. Postsecondary institutions will complete budget request forms 14, 17, and 14A using different tabs within Performance Budgeting. These forms will be rolled up to create the Budget Request Packet that will be submitted to the Executive Budget Office through electronic workflow.

Budget Request Forms

- **Form 14** Financial Summary
- **Form 17** Personnel
- **Form 14A** Hospital Financial Summary (if applicable)
- **Form 14B** Industries for the Blind (if applicable)

To Access STAARS Performance Budgeting:

Access to two different areas of STAARS will be required. Budget request forms will be completed in the STAARS Performance Budgeting application. Once all forms are finished, access to STAARS infoAdvantage will be necessary to run the reports (budget request packet) generated in the application. Please contact financialsystems@comptroller.Alabama.gov or call 334-353-9000 for login credentials.

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

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

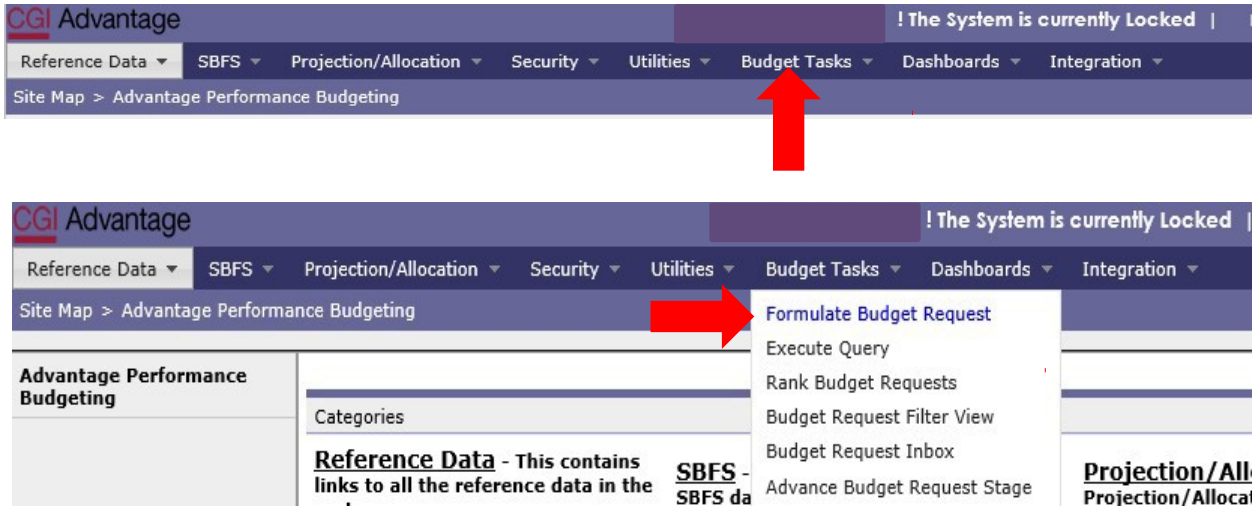
Additional instructions for navigation and browser setup:

http://staarstraining.alabama.gov/staars1050/STAARS1050.pdf

This link will provide step-by-step instructions to assist you with navigating the STAARS Budgeting Interface, browser preferences such as turning off pop-up blockers and allowing downloadable files. Instructions are also offered for users to add Performance Budgeting to My Favorites for easier access.

HEADER PAGE

After logging in, begin by clicking **Budget Tasks**. Then, select **Formulate Budget Request**.



The **Budget Layout Selection** screen will appear. This screen will be used several times during the preparation of the Budget Request. Below are the code names for Forms 14, 17, and 14A that will be used during the process.

FORM 14

- **PS BUD REQ E&G** - PS Restricted & Unrestricted & E&G Bud Request

Form 14

- **PS BUD REQ AUXILIARY** - PS Unrestricted Auxiliary Enterprises Bud Request

Form 17

- **PS BUD REQ PERSONNEL** - PS Restricted & Unrestricted Personnel Bud Request

FORM 14A

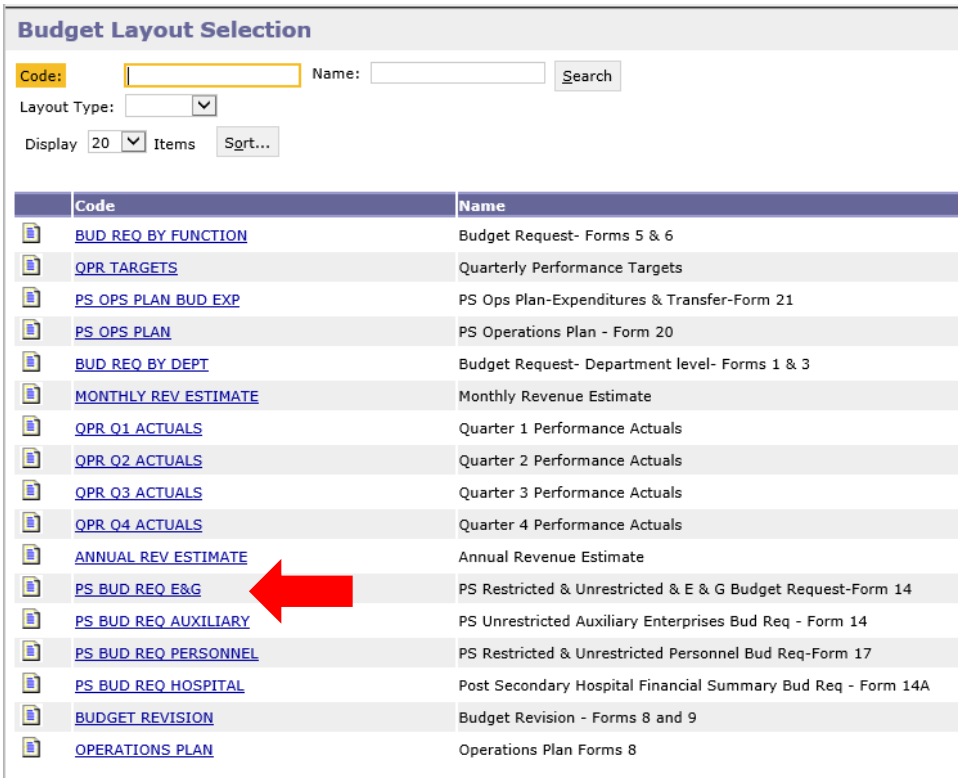
- **PS BUD REQ HOSPITAL** - PS Hospital Financial Summary Bud Request

PS BUD REQ E&G

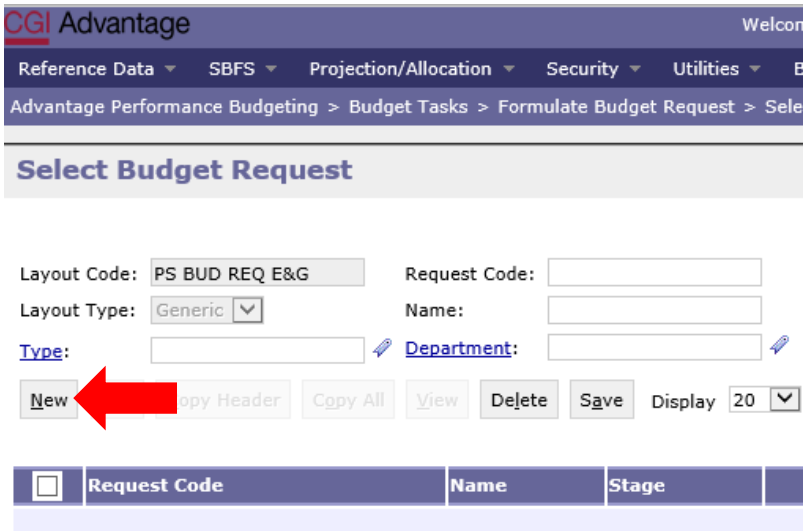
Form 14 - PS Restricted and Unrestricted & E&G Budget Request

The following steps will be completed twice: Once for restricted funds and once for unrestricted funds.

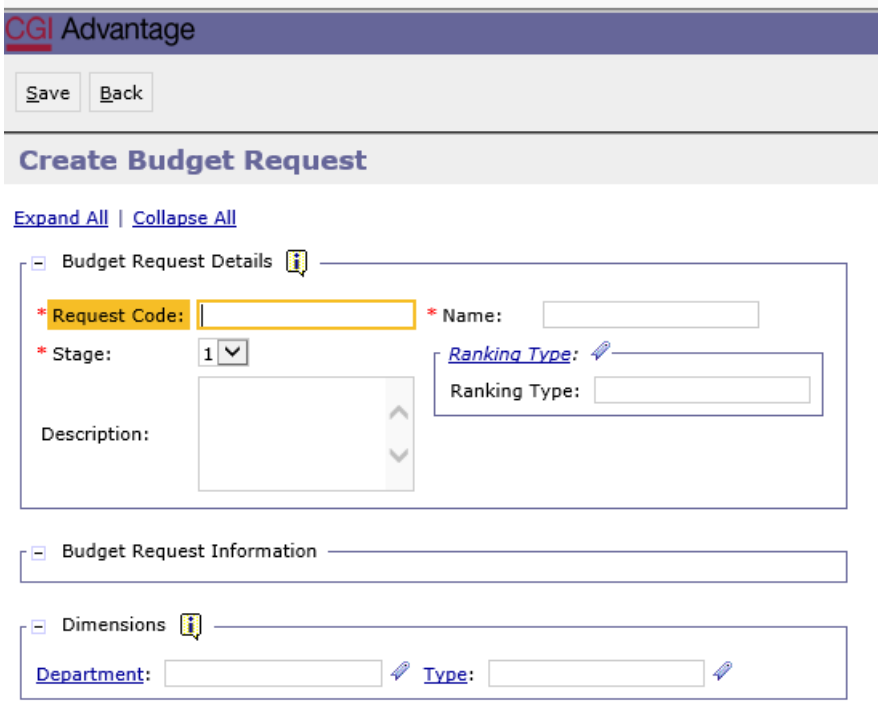
Step 1. Select **PS BUD REQ E&G** under the Code section to begin creating **Form 14**.



Step 2. On the **Select Budget Request** screen, click **New**.



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



Step 3. Complete the required fields in the **Budget Request Details** section by entering the following:

Request Code Example:

506 Form 14 RES

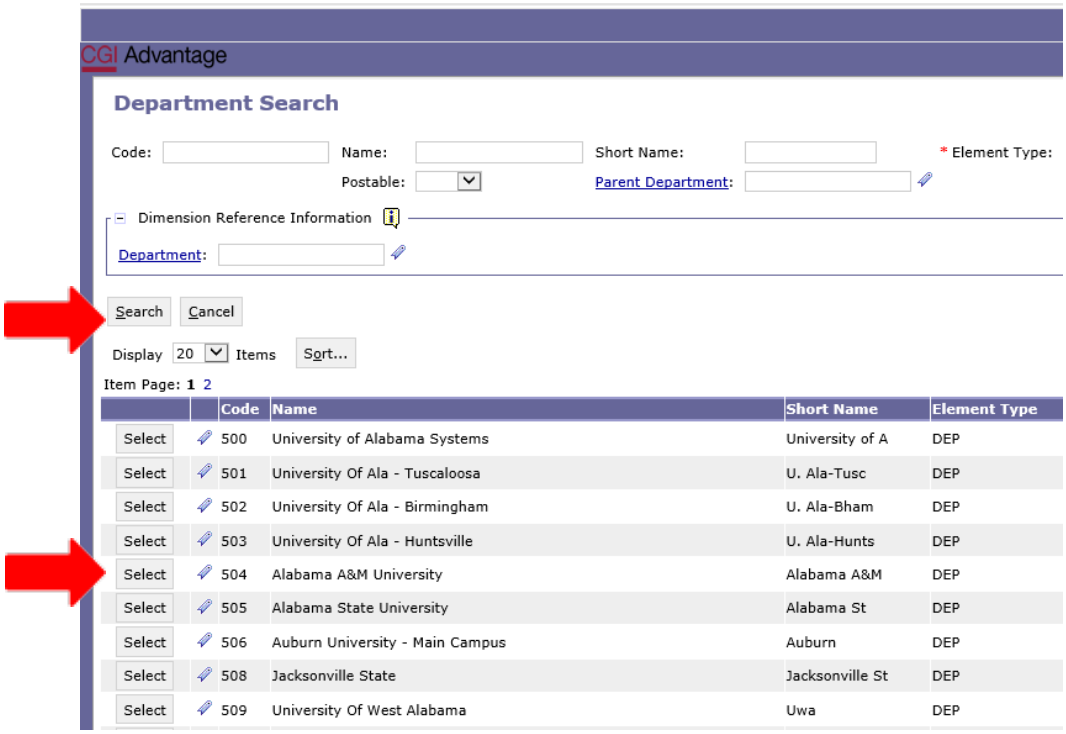
- Department/Institution Code: **3 Digits**
- **Form 14**
- **RES** (Restricted) or **UNR** (Unrestricted)

Name Example:

Auburn Main Form 14 RES

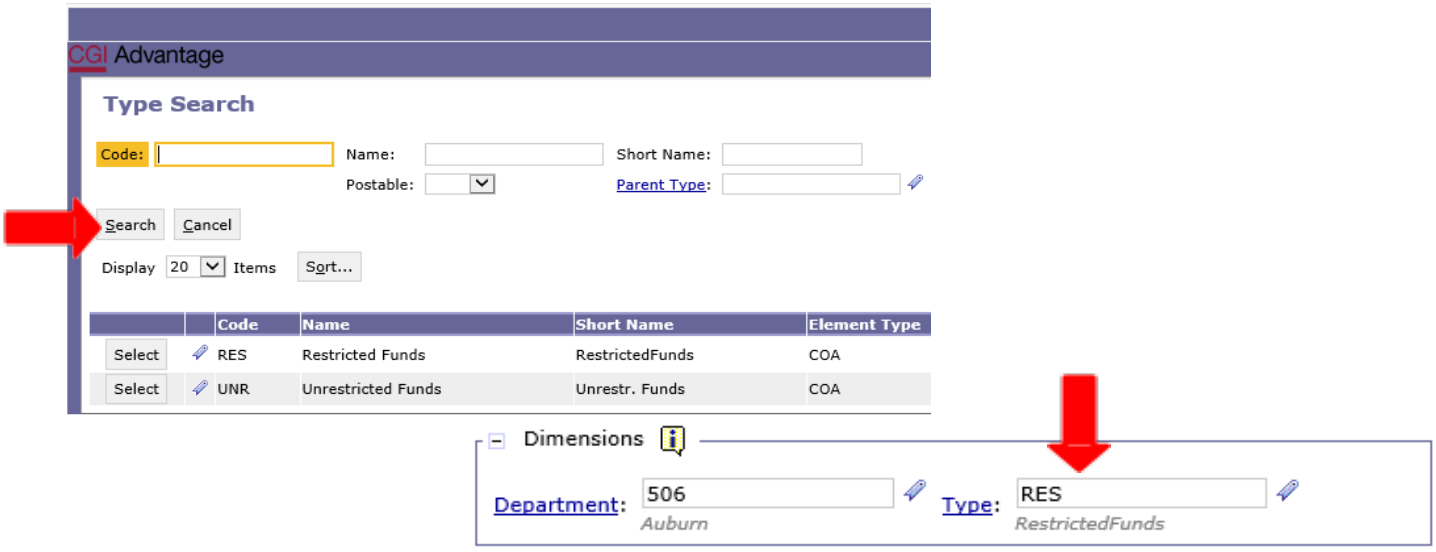
Step 4. Complete the **Dimensions** section in the bottom of the **Create Budget Request** screen by searching for each required field. Begin by keying your institution's assigned agency code or click on **Department.**

The **Department Search** screen will appear.

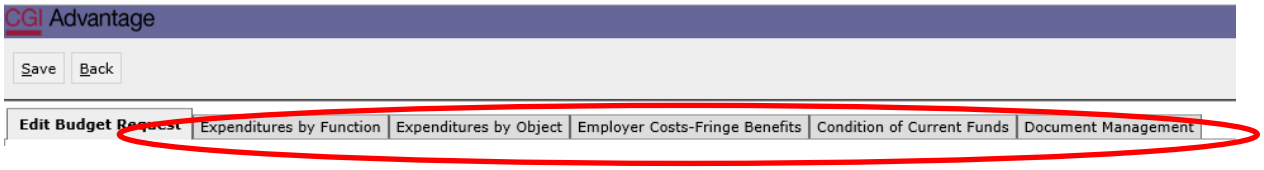


Step 5. Click on the **Search** button and when the screen changes, click **Search** again. Select the Department code specific to your institution.

Step 6. Staying in the **Dimensions** section, click on **Type**. Click on the **Search** button and when the screen changes to the **Type Search Screen**, click **Search** again. Select **RES** (Restricted Funds) or **UNR** (Unrestricted Funds) as needed.



Step 7. Once all fields are complete, click **Save** at the top of the page. **Action was Successful** will appear. Supplementary tabs emerge that will allow you to enter the institution data for Form 14. The tabs are as follows: **Expenditures by Function, Expenditures by Object, Employer Costs- Fringe Benefits, Condition of Current Funds**, and **Document Management.**



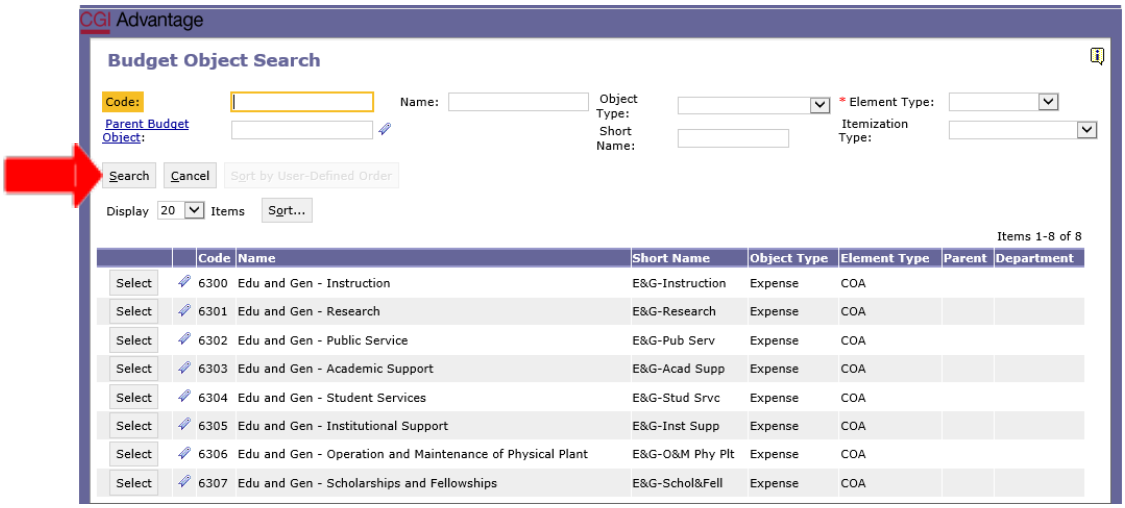
EXPENDITURES BY FUNCTION TAB

Step 1. Select the **Expenditures by Function** Tab.

Step 2. Select **New Item** to insert a new line that will allow you to add the institution's data for the Prior Year Actuals, Current Year Estimated, and Requested funds.

Step 3. In the **Budget Object** field, right click and then select **Search**.

The **Budget Object Search** screen will appear. Click search again for the codes to populate.



Step 4. Select the code(s) necessary to complete the institution's Educational and General(E&G)

Expenditures by Function data for **Restricted funds**. Key the amounts for all three columns**: Prior Year Actuals, Current Year Estimated,** and **Requested**. If an object does not apply to your institution in any given year, there is no need to select that budget object.

Below is a snapshot of the section from Form 14 that you will be preparing on the Expenditures by Function tab:

EDUCATIONAL AND GENERAL (E&G) EXPENDITURES BY

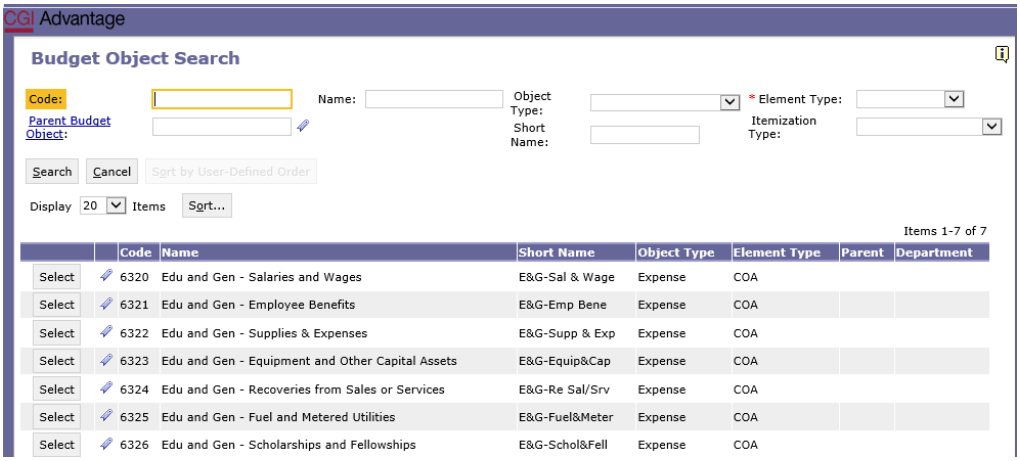
Instruction
Research
Public Service
Academic Support
Student Services
Institutional Support
Operation and Maintenance of Physical Plant
Scholarships and Fellowships

Step 5. Once complete, click **Save** at the top of the page. **Action was Successful** message will appear.

EXPENDITURES BY OBJECT TAB

Step 1. Select the **Expenditures by Object** Tab.

Step 2. Click **New** to insert a new line that will allow you to add the institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested funds**.



Step 3. In the **Budget Object** field, right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the Budget Object codes to populate.

Step 4. Select the code(s) required to complete the institution's Expenditures by Object data. Key the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

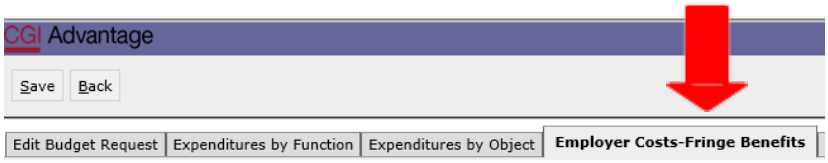
Below is a snapshot of the section from Form 14 that you will be preparing on the Expenditures by Object tab:

> **EDUCATIONAL AND GENERAL (E&G) EXPENDITURES BY** OBJECT
> Salaries and Wages
> Employee Benefits
> Supplies and Expenses
> Equipment and Other Capital Assets
> Scholarships and Fellowships
> FICA (Social Security and Medicare)
> Retirement
> Health Insurance
> Unemployment Compensation
> All Other

Step 5. Once complete, click **Save** at the top of the page. **Action was Successful** will appear.

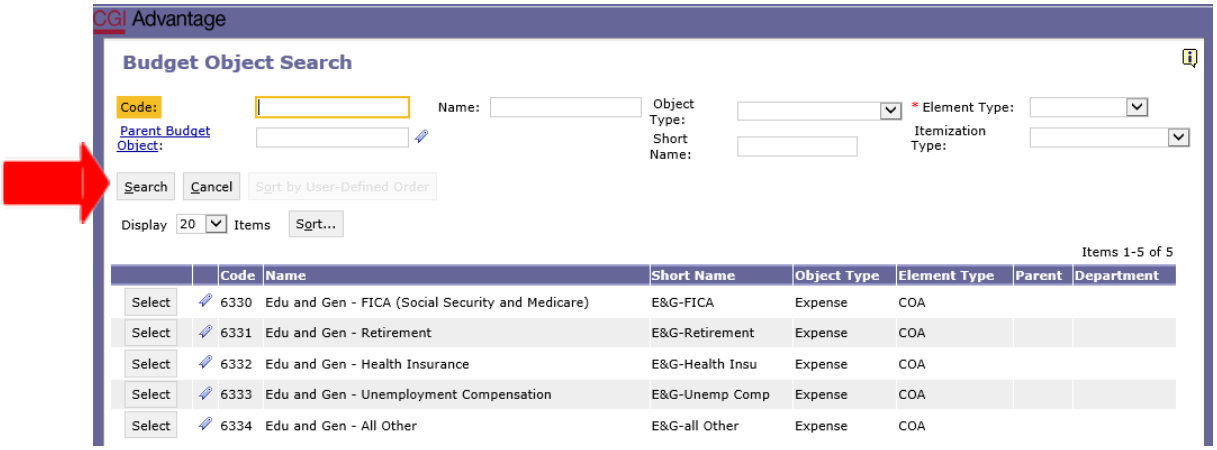
EMPLOYER COSTS-FRINGE BENEFITS TAB

Step 1. Select the **Employer Costs-Fringe Benefits** tab.



Step 2. Click **New Item** to insert a new line that will allow you to add the Institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested funds**.

Step 3. In the **Budget Object** field, right click and then select **Search**. The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete your institution's Fringe Benefits data. Key the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

Below is a snapshot of the section from Form 14 that you will be preparing on the Employer Costs-Fringe Benefits tab:

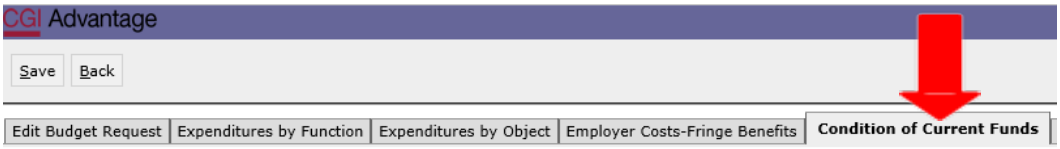
DETAIL OF EMPLOYER COSTS FOR FRINGE

FICA (Social Security and Medicare)
Retirement
Health Insurance
Unemployment Compensation
All Other

Step 5. Once complete, click **Save**. **Action was Successful** will appear.

CONDITION OF CURRENT FUNDS TAB

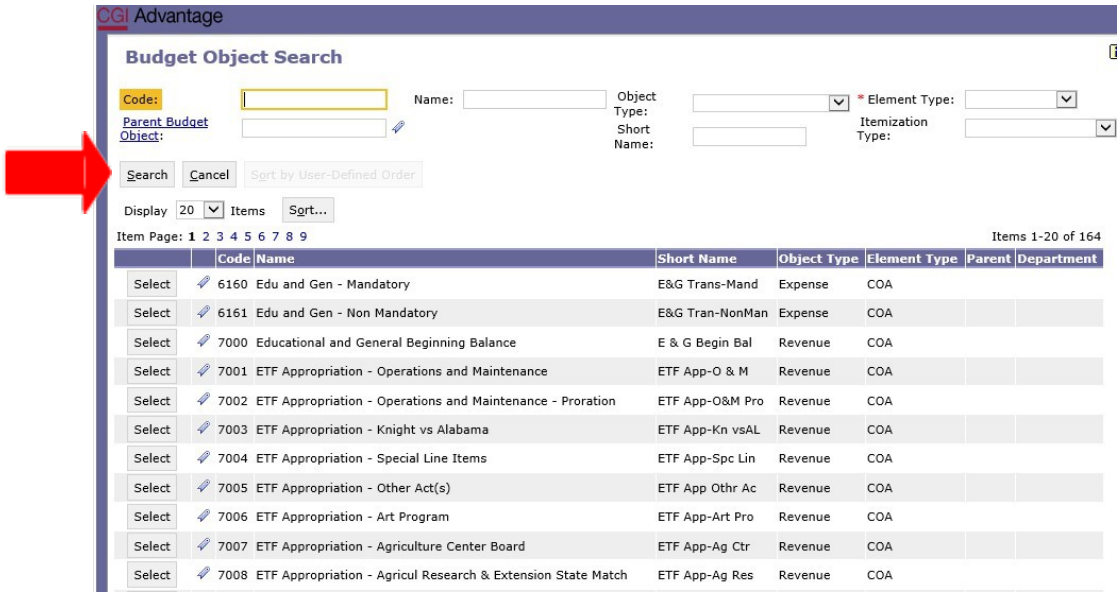
Step 1. Select the **Condition of Current Funds** tab.



Step 2. Click **New Item** to insert a new line that will allow you to add the institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested funds**.

Step 3. In the **Budget Object** field, right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's Condition of Funds information. Key the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

Below is a snapshot of the section from Form 14 that you will be preparing on the Condition of Funds tab:

EDUCATIONAL AND GENERAL BEGINNING BALANCE

REVENUES

ETF Appropriation - Operations & Maintenance

ETF Appropriation - Other (specify)

State Department of Education - In-Service Center

Other State Funds

Federal Funds

Federal - American Recovery and Reinvestment Act (ARRA)

Federal - State Fiscal Stabilization Funds (SFSF)

Local Funds

Tuition and Fees

All Other Sources: (Specify-Major Categories)

EDUCATIONAL AND GENERAL TRANSFERS (NET)

Mandatory

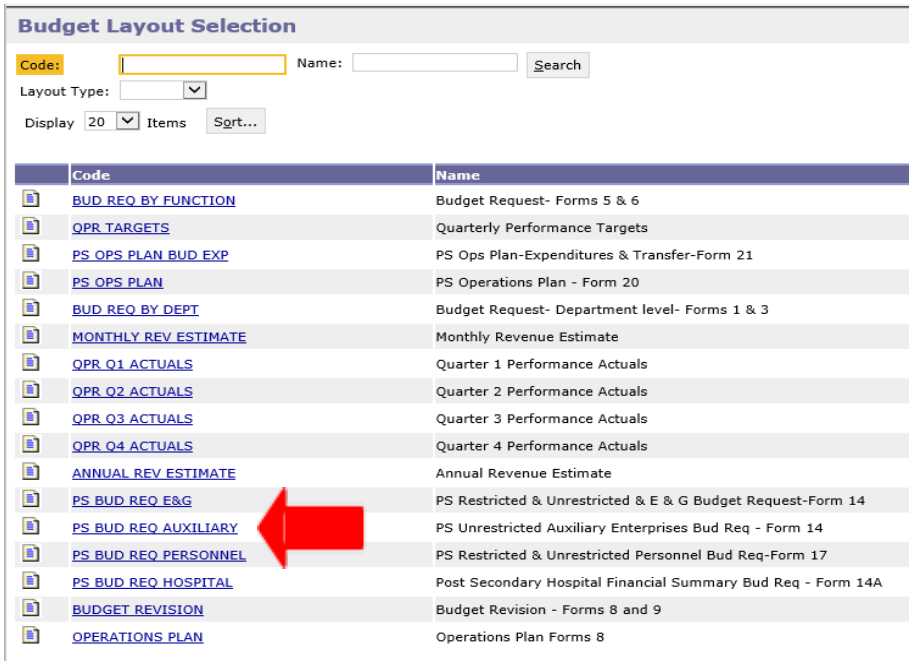
Non-Mandatory

Step 5. Once complete, click **Save** at the top of the page. **Action was Successful** will appear.

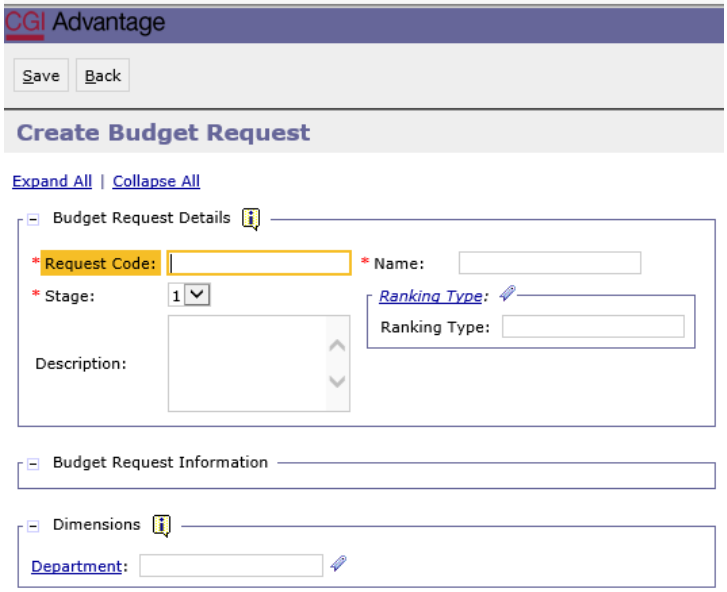
PS BUD REQ AUXILIARY

FORM 14 - PS Unrestricted Auxiliary Enterprises Bud Req

Step 1. On the **Budget Layout Selection** screen, select **PS BUD REQ AUXILIARY.**



Step 2. Click **New** to begin. The **Create Budget Request** screen will appear.



Step 3. Complete the required fields in the **Budget Request Details** section by entering the following:

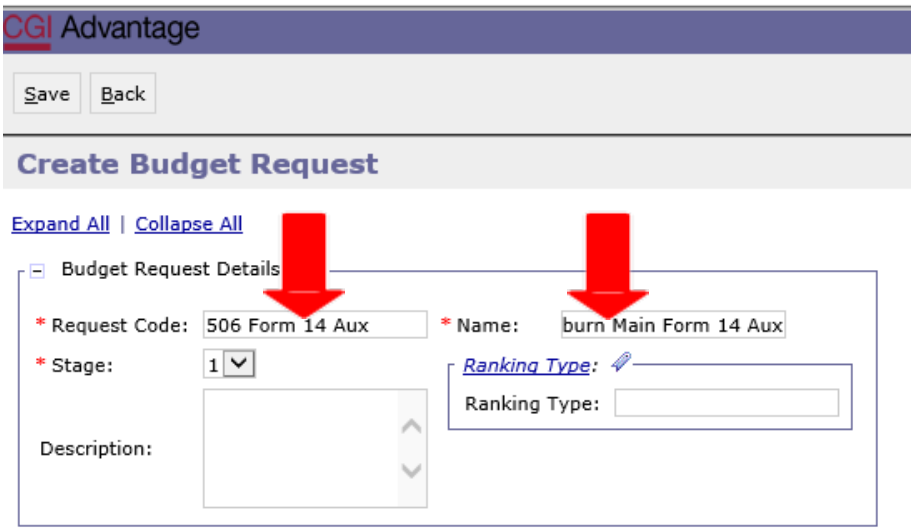
Request Code Example:

506 Form 14 AUX

- Department/Institution Code **(3 Digits)**
- **Form 14**
- **AUX**

Name Example:

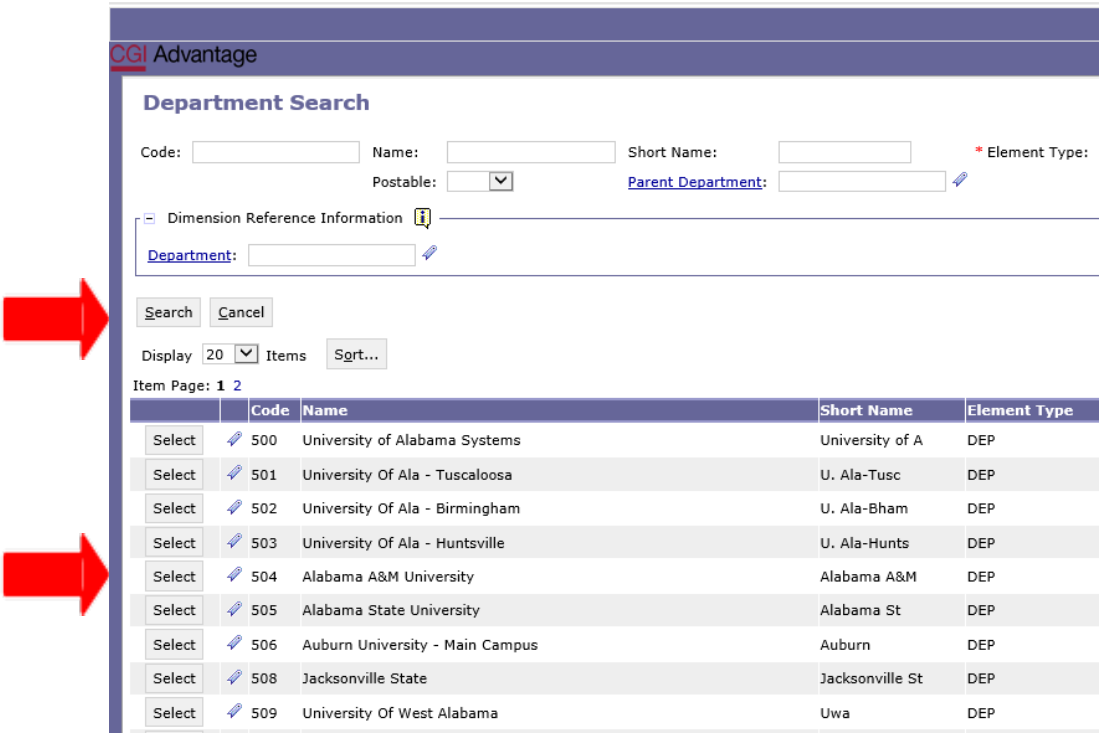
Auburn Main Form 14 AUX



Step 4. Complete the **Dimensions** section in the bottom of the **Create Budget Request** screen by searching for each required field. Enter the institution's code or click on **Department**.

The **Department Search** screen will appear.

Step 5. Click on the **Search** button. Select the Department code specific to your institution.



Step 6. Once complete, click **Save** at the top of the page. **Action was Successful** will appear. Supplementary tabs emerge on the page that will allow you to enter the institution data for Form 14. The tabs are as follows: **Auxiliary Revenues, Auxiliary Expenditures, Auxiliary Transfers,** and **Document Management**.

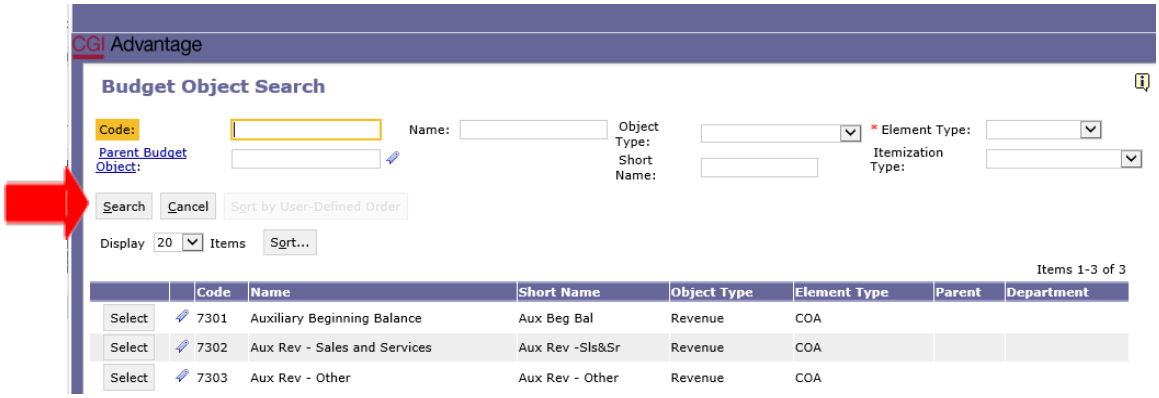
AUXILIARY REVENUES TAB

Step 1. Select the **Auxiliary Revenues** tab.

Step 2. Click **New Item** to insert a new line that will allow you to add the institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested** funds.

Step 3. In the **Budget Object** field right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's Auxiliary Revenue section. Key the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**. Below is a snapshot of the section from Form 14 that you will be preparing on the **Auxiliary Revenue** tab.

AUXILIARY ENTERPRISES

TOTAL AUXILIARYBEGINNING BALANCE

AUXILIARY REVENUES:

Sales and Services

Other: (specify-major categories)

Step 5. Once complete, click **Save** at the top of the page. **Action was Successful** will appear.

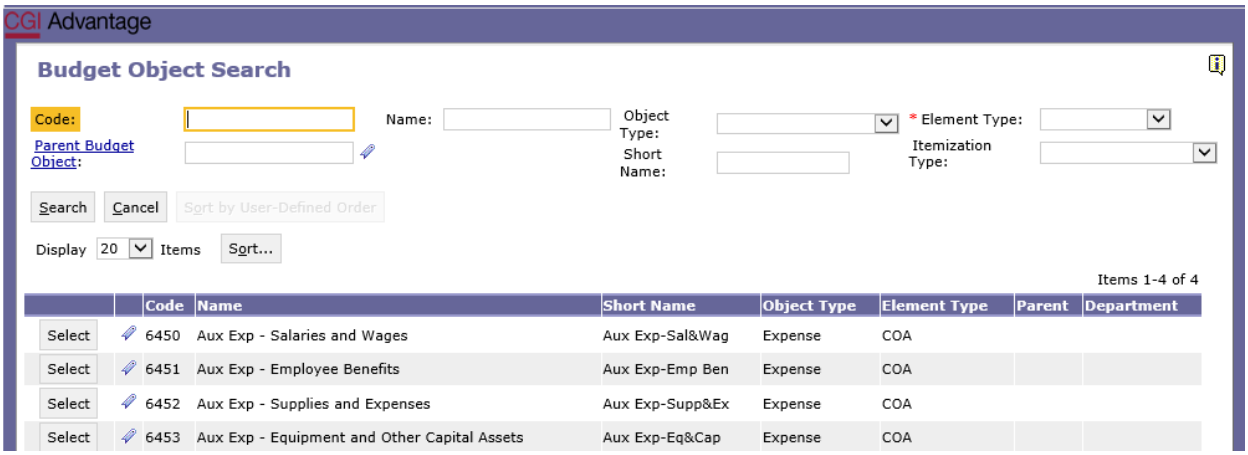
AUXILIARY EXPENDITURES TAB

Step 1. Select the **Auxiliary Expenditures** tab.

Step 2. Click **New** to insert a new line that will allow you to add the institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested** funds.

Step 3. In the **Budget Object** field right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's Auxiliary Expenditures section. Key the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

Below is a snapshot of the section from Form 14 that you will be entering on the Auxiliary Expenditures tab:

AUXILIARY EXPENDITURES:

Salaries and Wages

Employee Benefits

Supplies and Expenses

Equipment and Other Capital Assets

Step 5. Once complete, click **Save**. **Action was Successful** will appear.

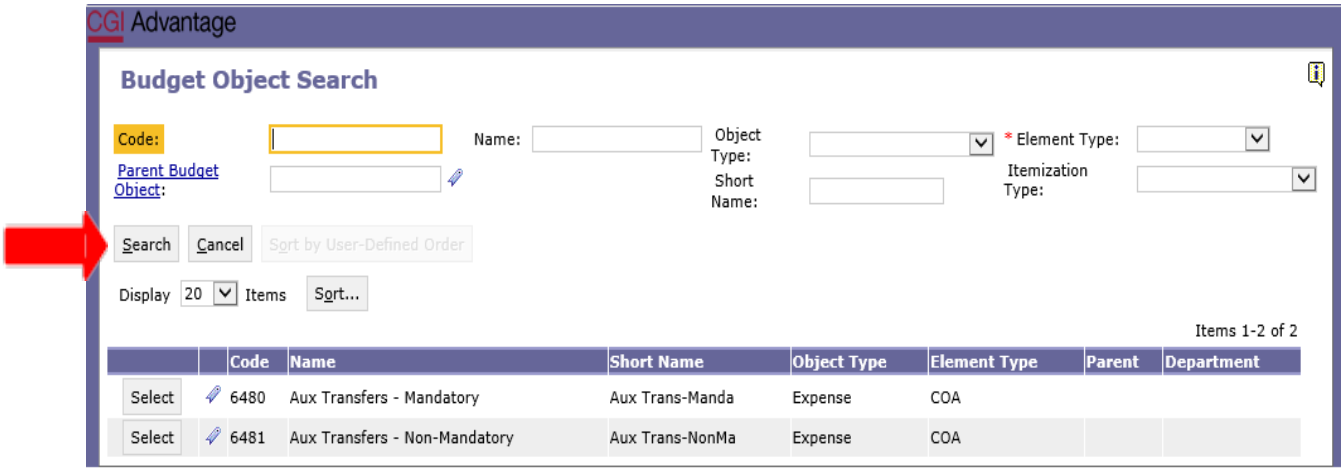
AUXILIARY TRANSFERS TAB

Step 1. Click the **Auxiliary Transfers** tab.

Step 2. Click **New Item** to insert a new line that will allow you to add the institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested funds**.

Step 3. In the **Budget Object** field, right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's Auxiliary Transfers section. Key the amounts for **Prior Year Actuals, Current Year Estimated** and **Requested**.

Below is a snapshot of the section from Form 14 that you will be entering on the Auxiliary Transfers tab:

<u>AUXILIARY TRANSFERS (NET)</u>

Mandatory

Non-Mandatory

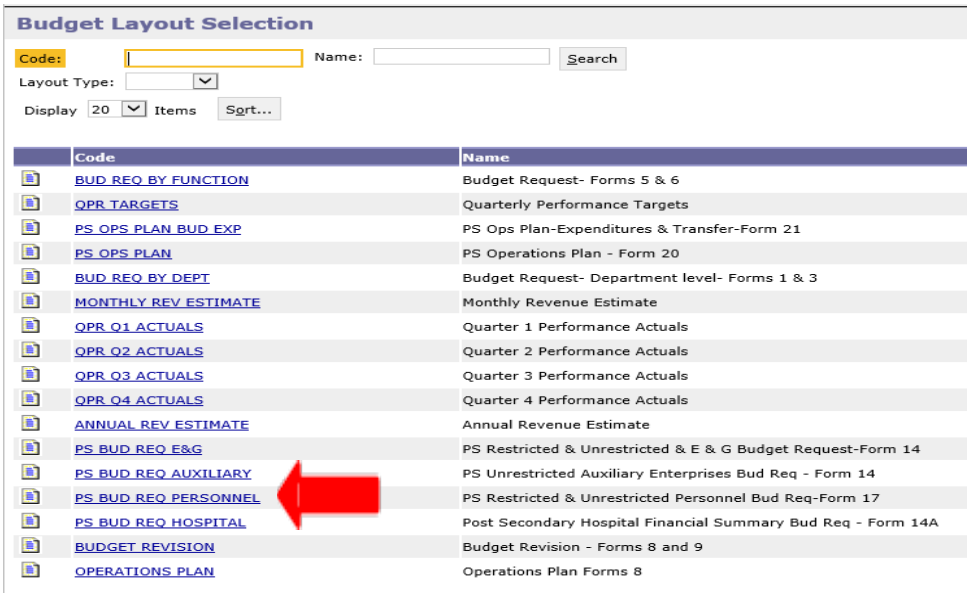
Step 5. Once complete, click **Save** at the top of the page. **Action was Successful** will appear.

PS BUD REQ PERSONNEL

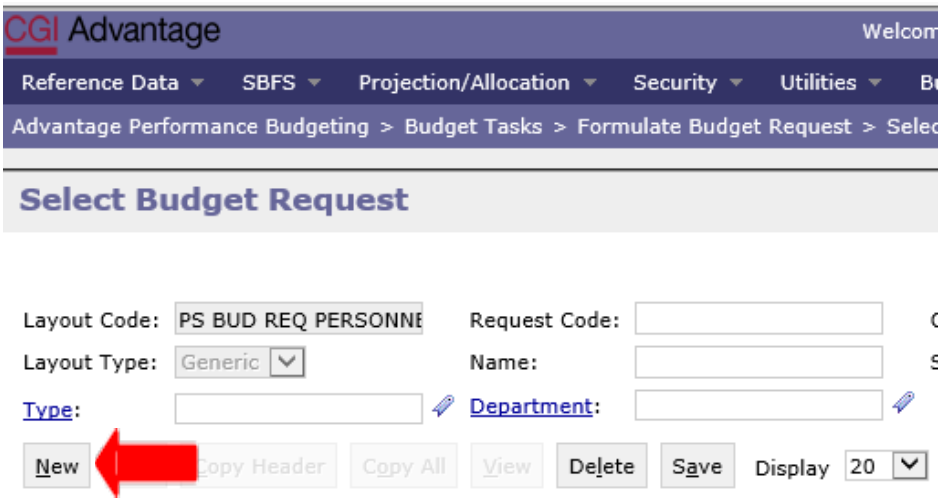
FORM 17 – PS Restricted & Unrestricted Personnel Bud Req

The following steps will be completed twice: Once for restricted funds and again for unrestricted funds.

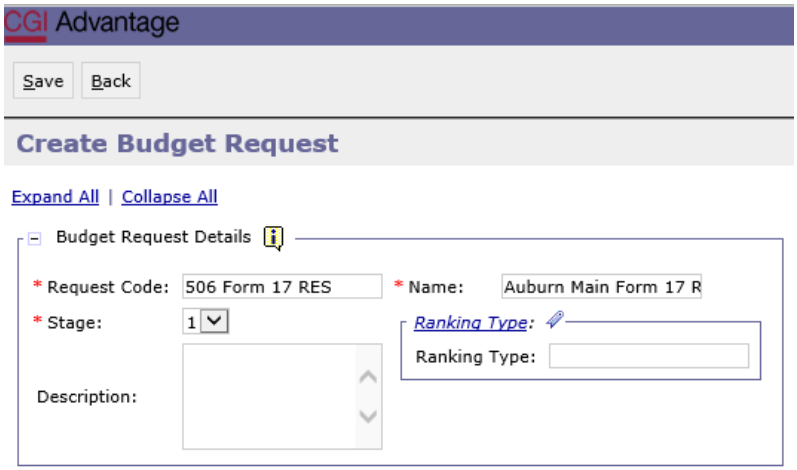
Step 1. Select **PS BUD REQ Personnel** under the Code section to begin creating Form 17.



Step 2. On the **Select Budget Request** screen, click **New**.



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



Step 3. Complete the required fields in the **Budget Request Details** section by entering the following:

<u>Request Code Example</u>:

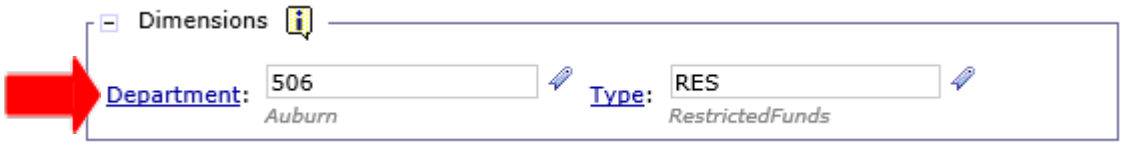
506 Form 17 RES

- Department/Institution Code: **3 Digits**
- **Form 17**
- **RES** (Restricted) or **UNR** (Unrestricted)

<u>Name Example</u>:

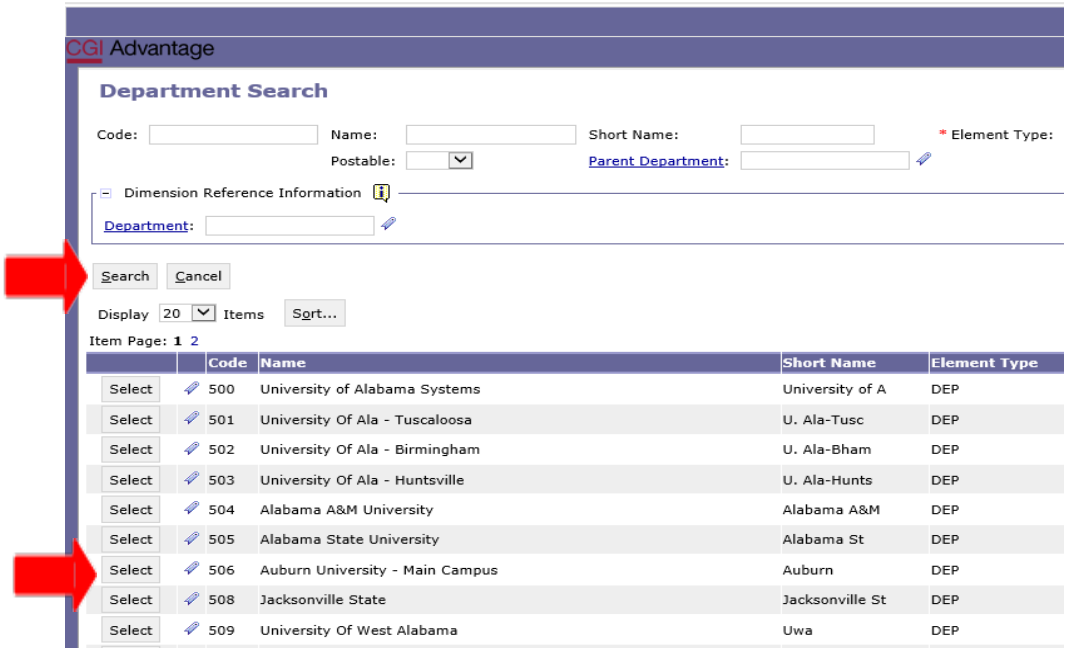
Auburn Main Form 17 RES

Step 4. Complete the **Dimensions** section in the bottom of the **Create Budget Request** screen by searching for each required field. Begin by keying your institution's assigned agency code or click on **Department**.

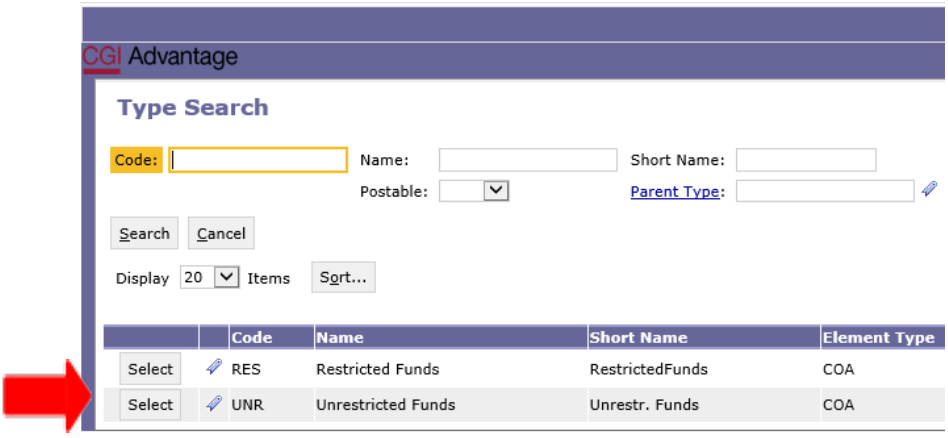


The **Department Search** screen will appear.

Step 5. Click on the **Search** button. Select the Department code specific to your institution.



Step 6. Remaining in the **Dimensions** section, click on **Type**. Click on the **Search** button and when the screen changes to the **Type Search Screen**, click **Search** again. Select **RES-Restricted Funds** or **UNR-Unrestricted Funds** as needed.



Step 7. Once complete, click at the top of the page. **Action was Successful** will appear. Supplementary tabs emerge that will allow you to enter the institution data for Form 14. The tabs are as follows: **E&G Personnel by Function, E&G Personnel by Occupational Activity, Auxiliary Enterprise by Occupational Activity,** and **Document Management.**

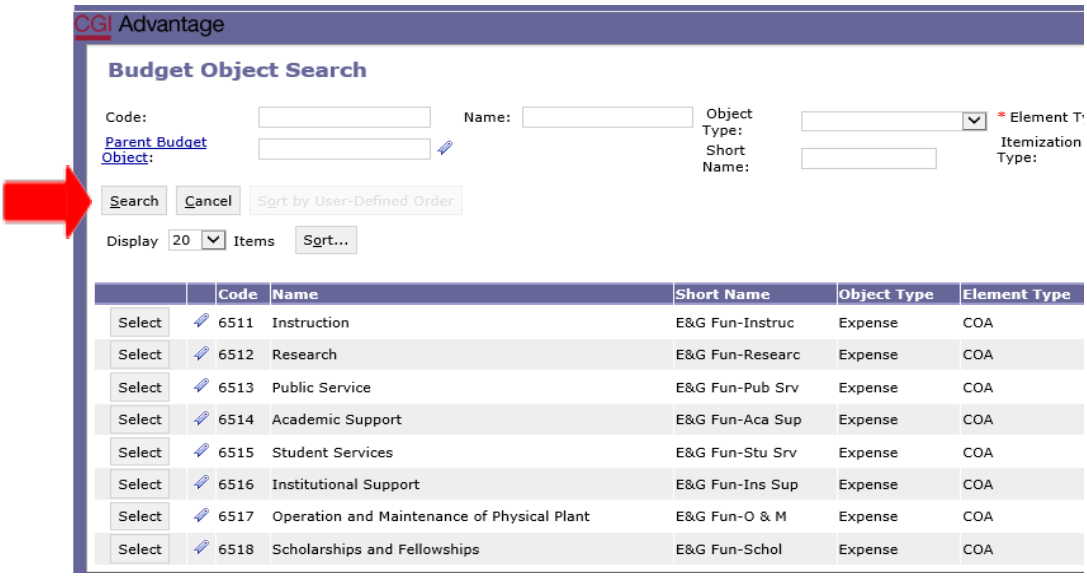
EDUCATIONAL & GENERAL (E&G) PERSONNEL BY FUNCTION TAB

Step 1. Click the **E&G Personnel by Function** tab.

Step 2. Click select **New** to insert a new line that will allow you to add the institution's data for the Prior Year Actuals, Current Year Estimated and Requestedfunds.

Step 3. In the **Budget Object** field, right click and then select **Search.**

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's **E&G Personnel by Function** section. Key the amounts for **Prior Year Actuals, Current Year Estimated**, and **Requested**. **Below is a snapshot of the section from Form 17 that you will be preparing for the E&G Personnel by Function tab:**

EDUCATIONAL AND FUNCTION

Instruction

Research

Public Service

Academic

Student

Institutional

Operation and

Step 5. Once complete, click **Save** at the top of the page. **Action was Successful** willappear.

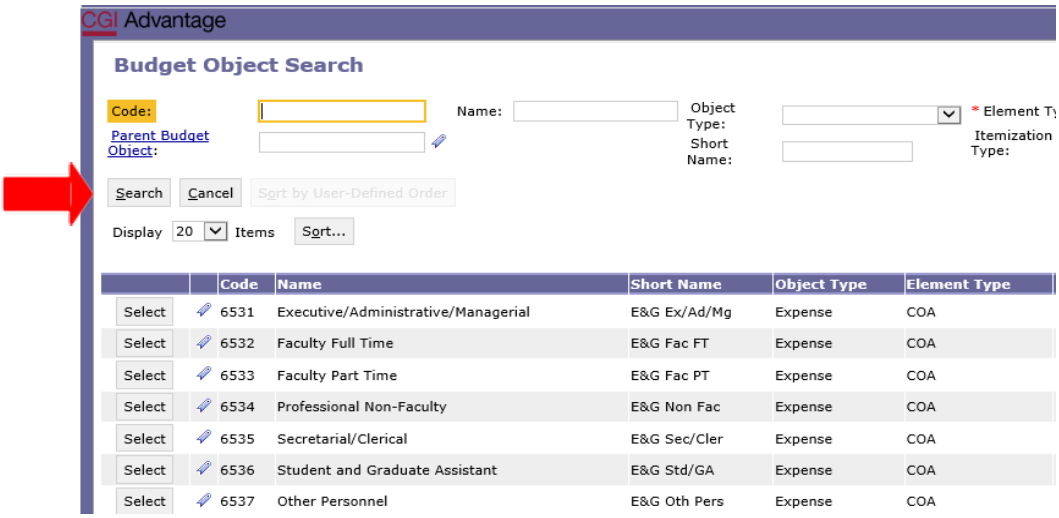
EDUCATIONAL & GENERAL (E&G) PERSONNEL BY OCCUPATIONAL ACTIVITY TAB

Step 1. Click the **E&G Personnel by Occu Activity** tab.

Step 2. Click **New Item** to insert a new line that will allow you to add the Institution's data for the **Prior Year Actuals, Current Year Estimated** and **Requested funds**.

Step 3. In the **Budget Object** field, right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's **E&G Personnel by Occupational Activity** section. Key the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

Below is a snapshot of the section from Form 17 that you will be preparing for the E&G Personnel by Occupational Activity tab:

EDUCATIONAL AND GENERAL

Executive / Administrative /

Faculty:

Full-Time

Part-Time

Professional

Secretarial /

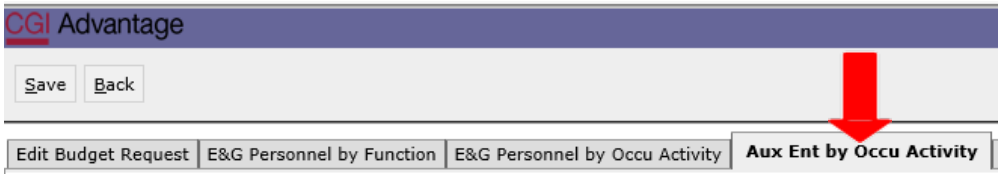
Student and

Other

Step 5. Once complete, click **Save**. **Action was Successful** will appear.

AUXILIARY ENTERPRISE BY OCCUPATIONAL ACTIVITY TAB

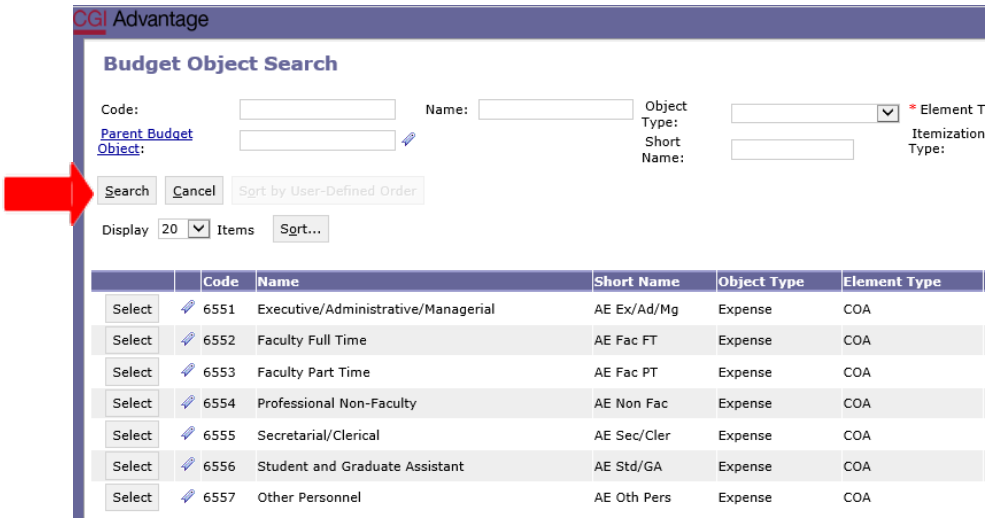
Step 1. Click the **Aux Ent by Occu Activity** tab.



Step 2. Click **New Item** to insert a new line that will allow you to add the institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested** funds.

Step 3. In the **Budget Object** field right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's Auxiliary Enterprise by Occupational Activity section. Key the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

Below is a snapshot of the section from Form 17 that you will be preparing for the Auxiliary Enterprise by Occupational Activity tab:

AUXILIARY ENTERPRISES (A&E) PERSONNEL BY

OCCUPATIONAL ACTIVITY

Executive / Administrative / Managerial

Faculty

Professional Non-Faculty

Secretarial / Clerical

Student & Graduate Assistants

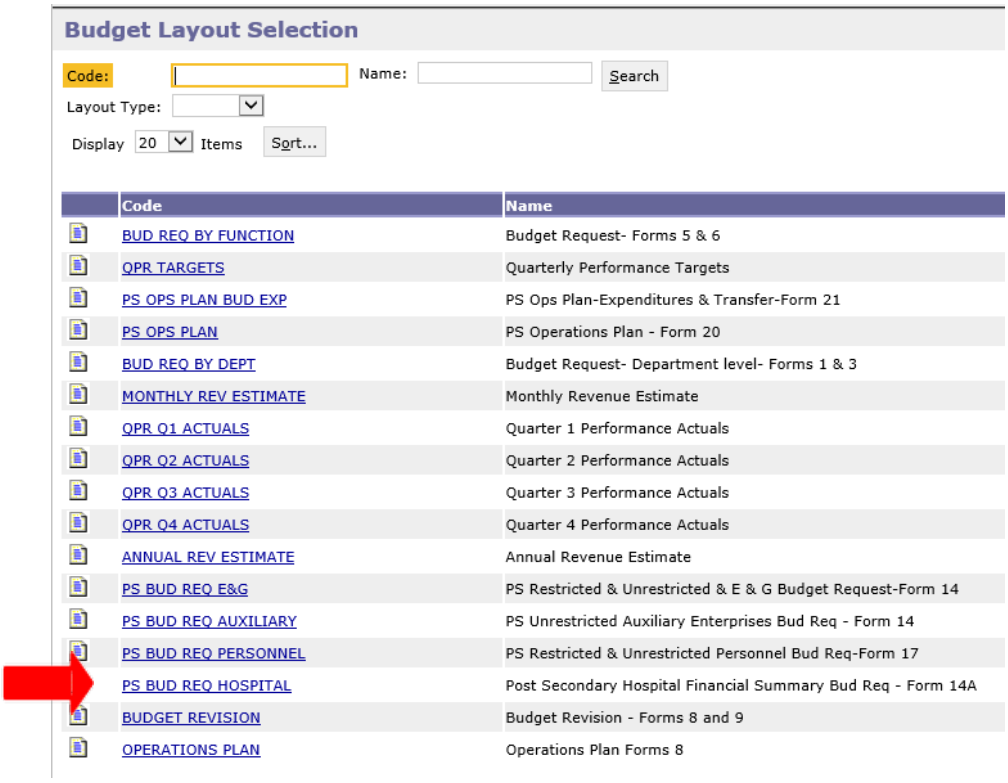
Other Personnel

Step 5. Once complete, click **Save**. **Action was Successful** will appear.

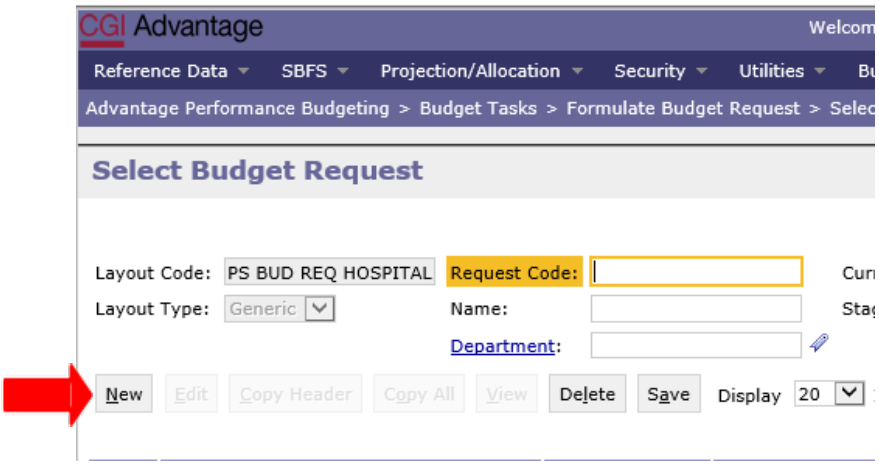
PS BUD REQ HOSPITAL

Form 14A – Postsecondary Hospital Financial Summary Bud Req

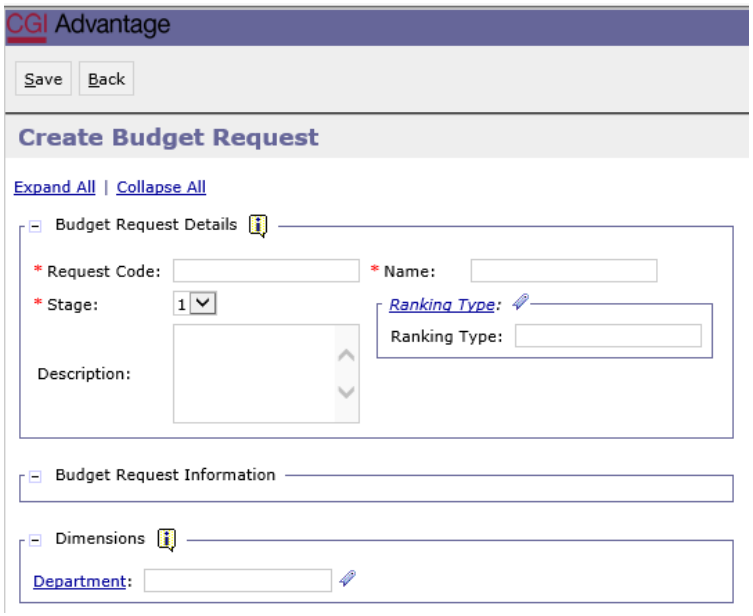
Step 1. Select **PS BUD REQ HOSPITAL** under the Code section to begin creating Form 14A.



Step 2. On the **Select Budget Request** screen, click **New**.



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



Step 3. Complete the required fields in the **Budget Request Details** section by entering the following:

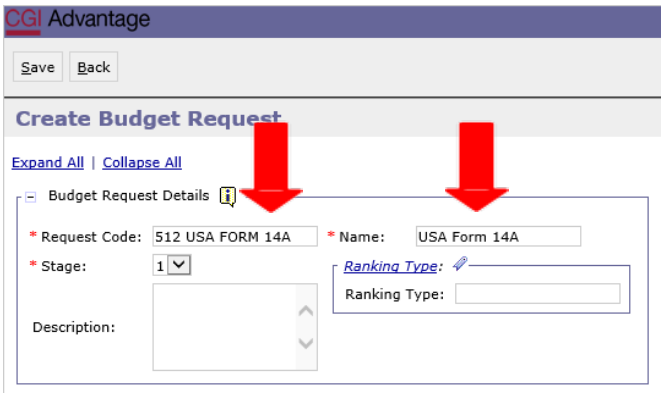
Request Code Example:

512 Form 14A

- Department/Institution Code: **3 Digits**
- **Form 14A**

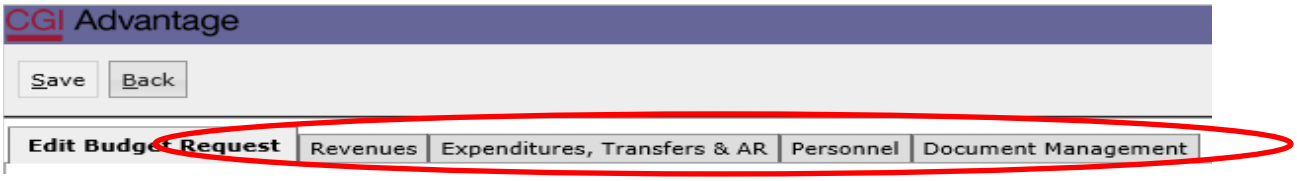
Name Example:

USA Form 14A



Step 4. Complete the **Dimensions** section in the bottom of the **Create Budget Request** screen by searching for each required field. Begin by keying your institution's assigned agency code or click on **Department**. The **Department Search** screen will appear. Search and find the codes specific to your institution.

Step 5. Once all fields are complete click **Save** and **Action was Successful** will appear. Supplementary tabs emerge that will allow you to enter the institution data for Form 14A. The tabs are as follows: **Revenues, Expenditures, Transfer & AR, Personnel,** and **Document Management.**



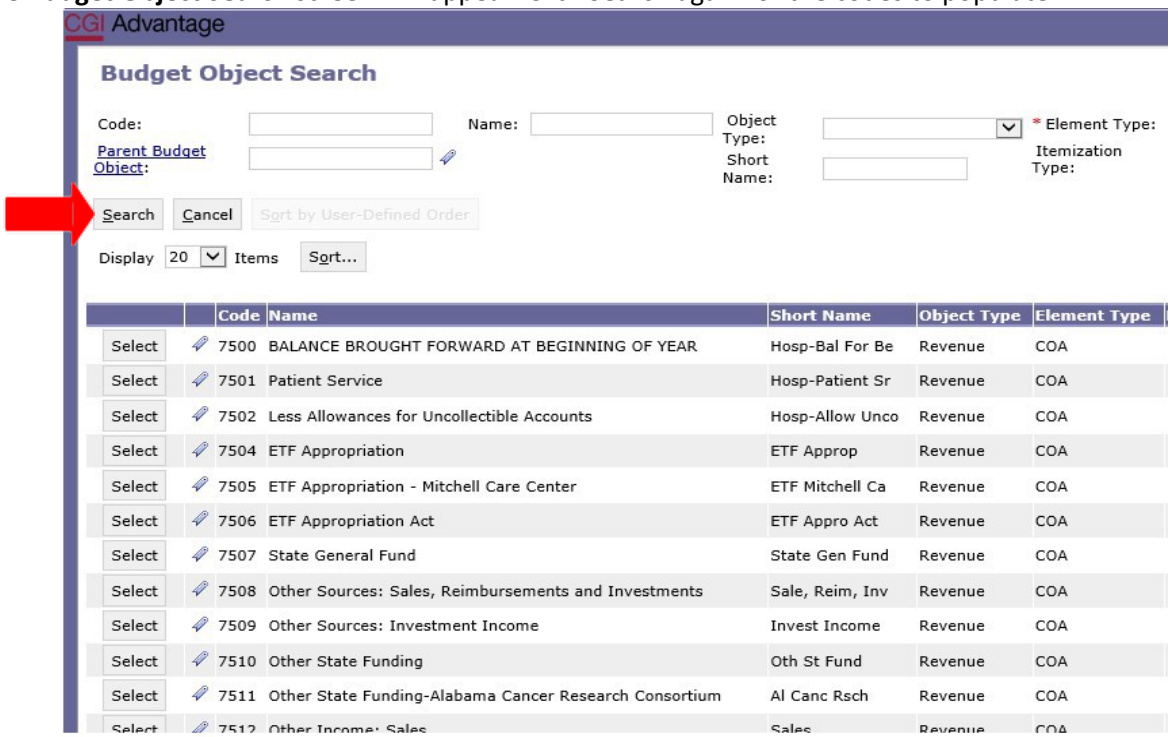
HOSPITAL - REVENUES

Step 1. Click the **Revenues** tab.

Step 2. Click **New Item** to insert a new line that will allow you to add the institution's data for the **Prior Year Actuals, Current Year Estimated,** and **Requested** funds.

Step 3. In the **Budget Object** field right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's Hospital Revenue. Include the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

.

Below is a snapshot of the section from Form 14A that you will be preparing for the Revenues tab:

BALANCE BROUGHT FORWARD AT BEGINNING OF YEAR

REVENUES

Patient Service

Less Allowances for Uncollectible Accounts

Net Patient Service

ETF Appropriation

ETF Appropriation - Act

Other Income (Specify-Major Categories):

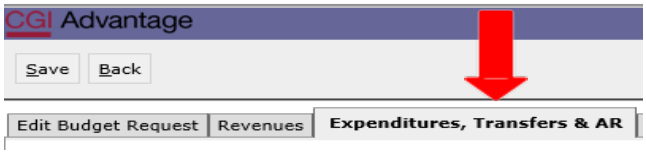
TOTAL HOSPITAL REVENUES

Step 5. Once complete, click **Save**. **Action was Successful** will appear.

HOSPITAL – EXPENDITURES, TRANSFERS & ACCOUNTS

RECEIVABLE (AR) TAB

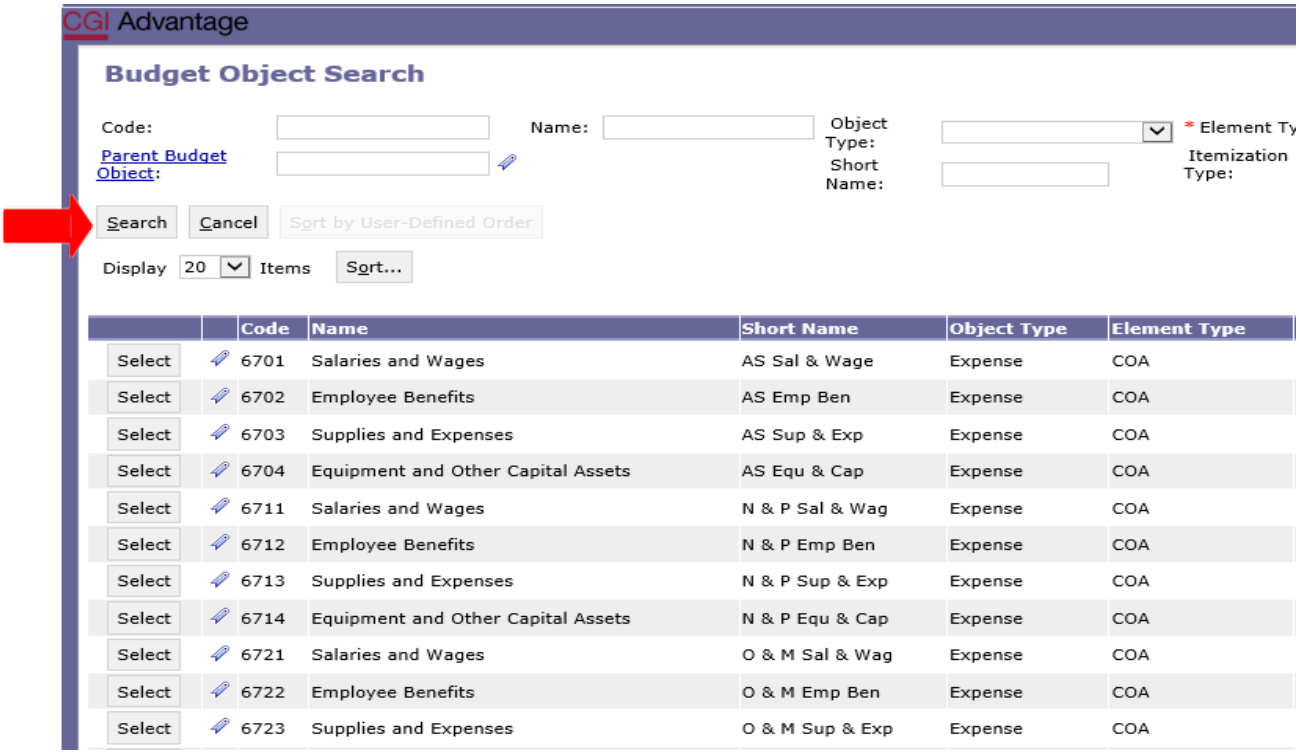
Step 1. Click the **Expenditures, Transfers & AR** tab.



Step 2. Click **New Item** to insert a new line that will allow you to add the institution's Hospital Financial Summary.

Step 3. In the **Budget Object** field right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the institution's Hospital Expenditures. Include the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

Below is a snapshot of the section from Form 14A that you will be preparing for the Hospital Expenditures, Transfers & AR tab:

Expenditures

Administrative Services (AS):

- Salaries and Wages
- Employee Benefits
- Supplies and Expenses
- Equipment and Other Capital Assets

Nursing and Professional (N&P) Services:

- Salaries and Wages
- Employee Benefits
- Supplies and Expenses
- Equipment and Other Capital Assets

Operation and Maintenance (O&M) of Physical

- Salaries and Wages
- Employee Benefits
- Supplies and Expenses
- Equipment and Other Capital Assets
- Utilities

TRANSFERS (NET)

- Mandatory
- Non-mandatory

ACCOUNTS RECEIVABLE

- Beginning of Year
- End of Year

Step 5. Once complete, click **Save**. **Action was Successful** will appear.

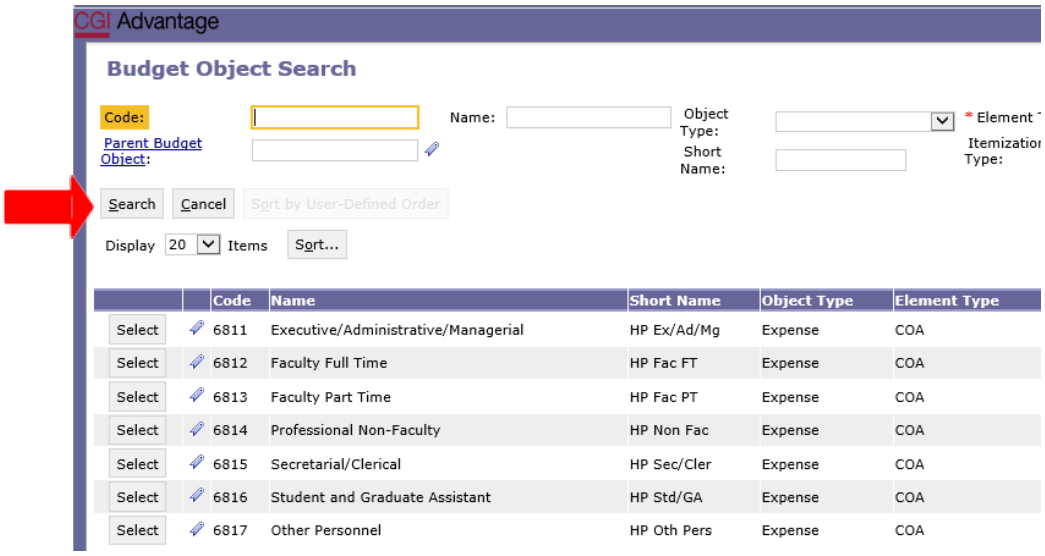
HOSPITAL – PERSONNEL TAB

Step 1. Click the **Personnel** tab.

Step 2. Click **New Item** to insert a new line that will allow you to add the institution's Hospital Personnel Summary.

Step 3. In the **Budget Object** field, right click and then select **Search**.

The **Budget Object Search** screen will appear. Click **Search** again for the codes to populate.



Step 4. Select the code(s) required to complete the **Hospital Personnel** data. Include the amounts for **Prior Year Actuals, Current Year Estimated,** and **Requested**.

Below is a snapshot of the section from Form14A that you will be preparing for the Hospital Personnel tab:

HOSPITAL PERSONNEL

Executive / Administrative / Faculty:
- Full-Time
- Part-Time

Professional Non-Secretarial / Clerical
Student Assistants
Other Personnel

Step 5. Once complete, click **Save**. **Action was Successful** will appear.

DOCUMENT MANAGEMENT TAB

The Budget Request Packet consist of forms 14, 17 and 14A. Once completed, the forms will need to be generated in infoAdvantage for review. If corrections are needed, return to STAARS Budgeting to make the necessary changes. After any corrections, the packet will need to be generated again in infoAdvantage to attach in the Document Management tab.

NOTE: Include ALL documentation required to be attached for a Budget Request.

***SAVE IN PDF FORMAT**

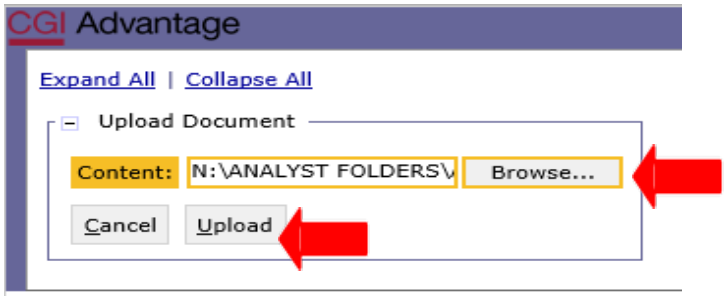
Please use the below format for naming documents:

Example: FY 22 510 Postsecondary Budget Request

All reports created for Postsecondary Budget Request in infoAdvantage will need to be attached to Form 14 on the Document Management tab using the following steps:

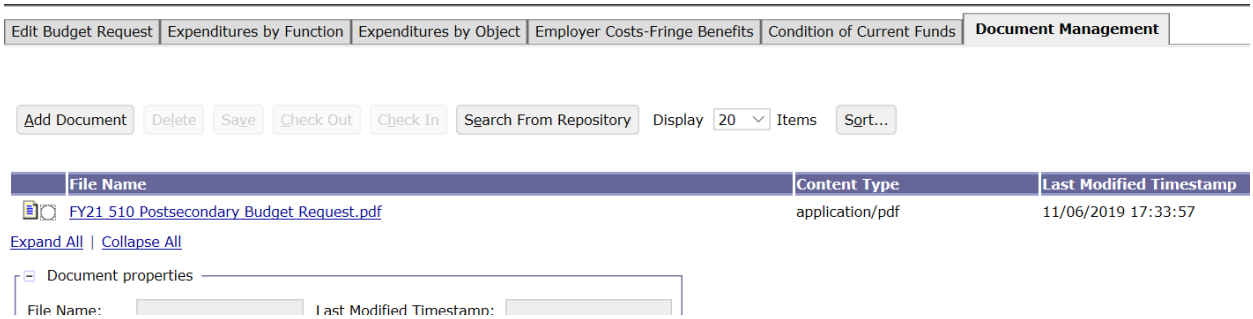
Step 1. Select the **Document Management** tab.

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.



Step 5. Click **Save**.

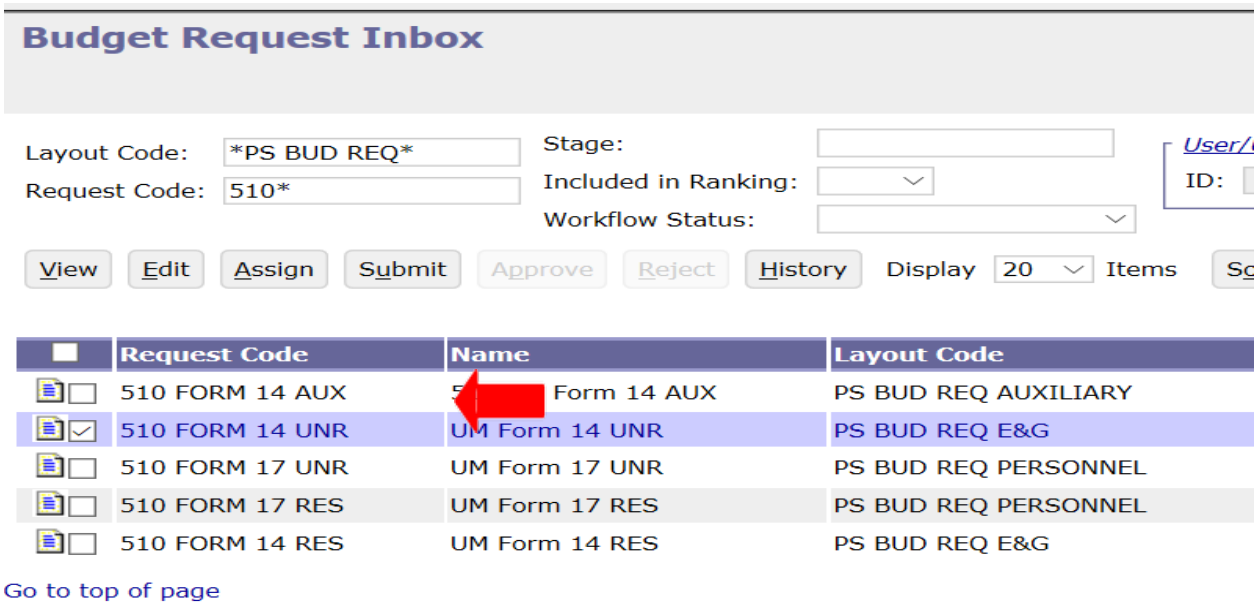
Step 6. Click **Back to Inbox**.

SUBMISSION

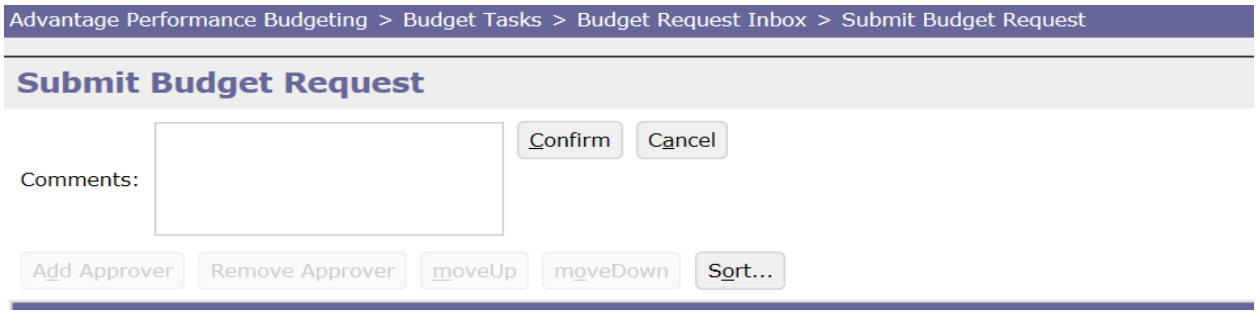
To submit the final Packets (Budget Request, Operations Plan, Budget Revisions, etc.), return to the **Budget Tasks** drop down menu.

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

Step 2. Select the Budget Request, Operations Plan or Budget Revision that is ready to be submitted.



Step 3. Click **Submit.** The following screen displays, allowing you to add comments for the Executive Budget Office.



Step 4. Click **Confirm**. You will be taken back to the **Budget Request Inbox** and receive a message that the Budget Request, Operations Plan or Revision was **Successfully Submitted**. Each document submitted will be identified by the name given during preparation.

WORKFLOW

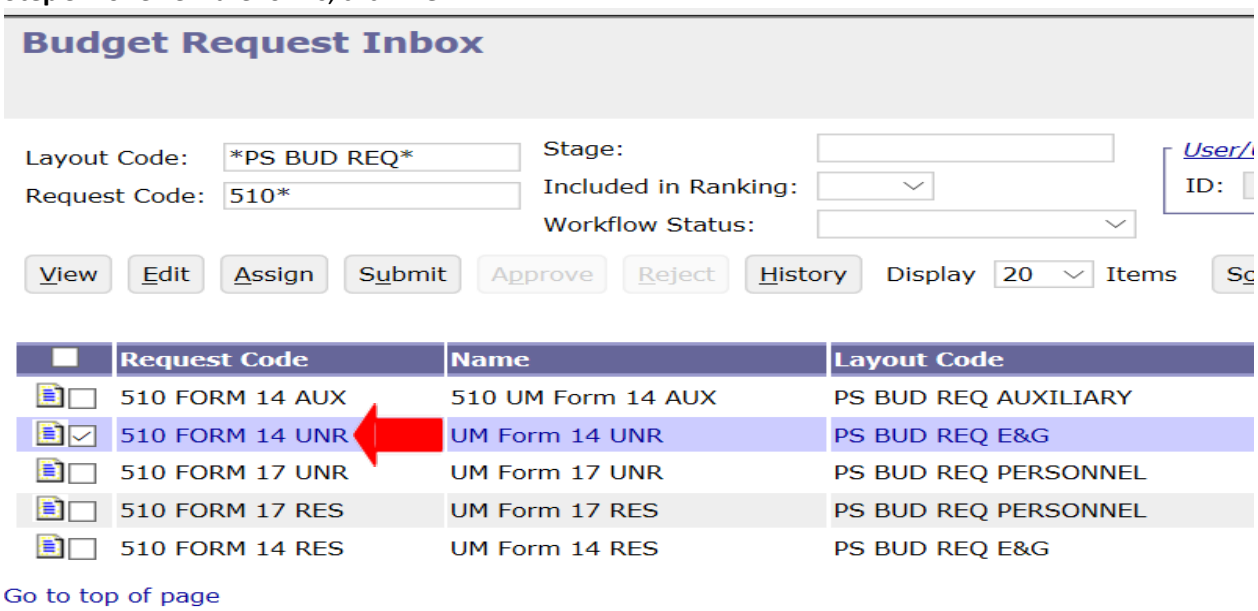
The 1st approver will receive an email. The email will include the comment along with a link to STAARS Budgeting.

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

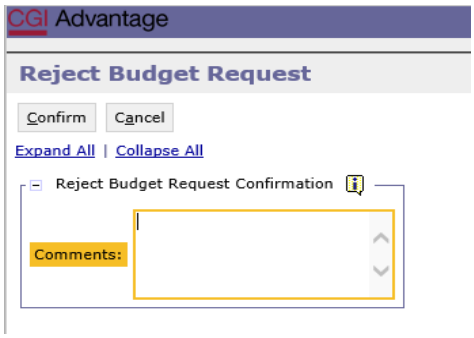
Step 1. Clicking the link will bring up the sign in page for STAARS Budgeting. The 1st approver will need to open their **Budget Request Inbox** under **Budget Tasks**.

Step 2. The 1st approver will need to **select the form(s).**

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



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



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

Step 6. Click **Confirm**. This will send the Budget Request, Operations Plan, or 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 Performance Budgeting to open the document and make the necessary corrections.

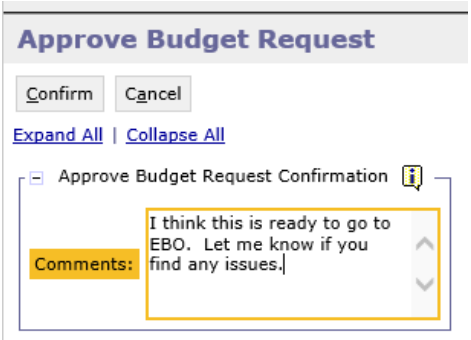
We also need to move funds from object 0800 to object 0900 in Fund 0399 for Fund 0275. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

NOTE: The submitter should make the required changes in Performance Budgeting, rerun the reports in infoAdvantage, and attach updated error reports (with no mismatch message) in the **Document Management** tab. The process should take place anytime corrections are made. Then, the submitter can resubmit the packet(s) to the 1st approver.

Step 7. Once the 1st approver receives the corrected Budget Request and determines that the packet is satisfactory, the 1st approver can use the email received to follow the link and now approve the form(s) by clicking **Approve**.

Step 8. The **Approve Budget Request** screen displays where you can add **Comments** to send to the 2nd approver.

Step 9. Click **Confirm** to approve the Budget Request.



Step 10. The 2nd approver will receive an email with a link to Performance Budgeting to login and approve.

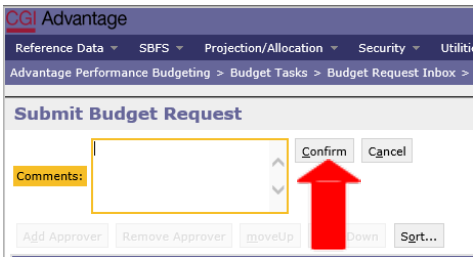
I think this is ready to go to EBO. Let me know if you find any issues. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

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

Step 11. To submit the form(s) to the 2nd approver, select the form(s) again, then click **Submit**.

The **Submit Budget Request** screen displays.

Step 12. Click **Confirm** to submit the Budget Request, Operations Plan, or Budget Revision.



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

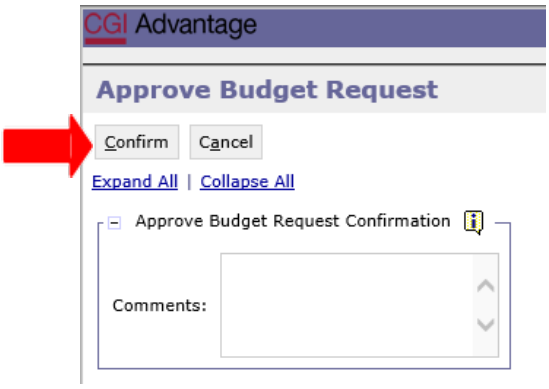
Additional Option - Reject

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

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

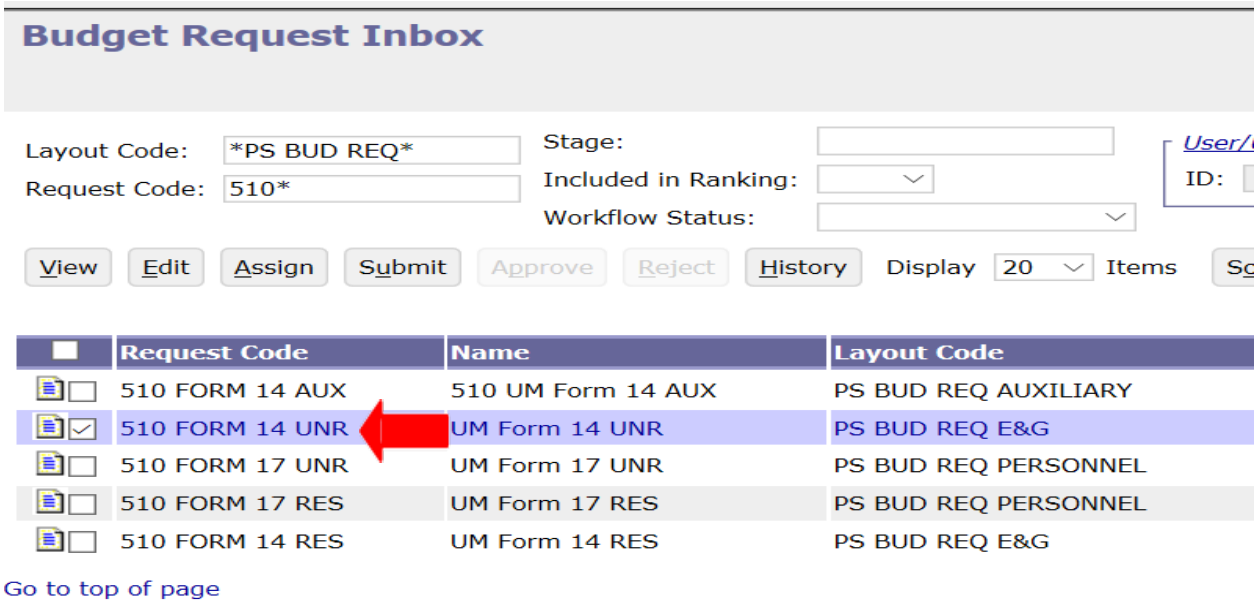
The **Approve Budget Request** screen displays, allowing for **Comments**.

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



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

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



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 form(s) was **Successfully Submitted.**

The process to submit to the Executive Budget Office is Complete!

NOTE: If rejected by the Executive Budget Office, the forms(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).