

Performance Budgeting Manual

**For Postsecondary
Institutions**



Executive Budget Office

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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:

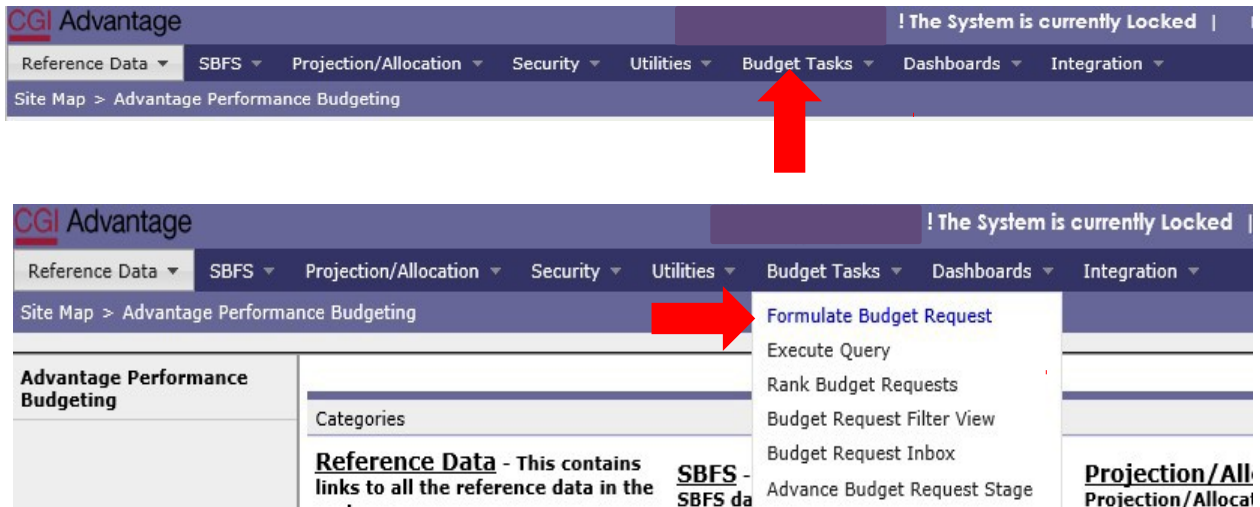
Access to two different areas of STAARS will be required. Budget request forms will be completed in the STAARS Performance Budgeting application. Once all forms are finished, access to STAARS infoAdvantage will be necessary to run the reports (budget request packet) generated in the application. Please 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>

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**.

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

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

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

Select Budget Request

Layout Code: Request Code:

Layout Type: Name:

Type: Department:

Display ▾

<input type="checkbox"/>	Request Code	Name	Stage	
--------------------------	--------------	------	-------	--

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

CGI Advantage

Save Back

Create Budget Request

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

☐ Budget Request Details ⓘ

* Request Code: * Name:

* Stage: 1 Ranking Type: [Ranking Type](#) ⓘ

Description:

Ranking Type:

☐ Budget Request Information

☐ Dimensions ⓘ

[Department](#): ⓘ [Type](#): ⓘ

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**.

☐ Dimensions ⓘ

[Department](#): 506 ⓘ [Type](#): RES ⓘ

Auburn RestrictedFunds

The **Department Search** screen will appear.

Department Search

Code: Name: Short Name: * Element Type:
 Postable: Parent Department:

Dimension Reference Information

Department:

Display Items

Item Page: **1** 2

	Code	Name	Short Name	Element Type
Select	500	University of Alabama Systems	University of A	DEP
Select	501	University Of Ala - Tuscaloosa	U. Ala-Tusc	DEP
Select	502	University Of Ala - Birmingham	U. Ala-Bham	DEP
Select	503	University Of Ala - Huntsville	U. Ala-Hunts	DEP
Select	504	Alabama A&M University	Alabama A&M	DEP
Select	505	Alabama State University	Alabama St	DEP
Select	506	Auburn University - Main Campus	Auburn	DEP
Select	508	Jacksonville State	Jacksonville St	DEP
Select	509	University Of West Alabama	Uwa	DEP

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.

Type Search

Code: Name: Short Name:
 Postable: Parent Type:

Display Items

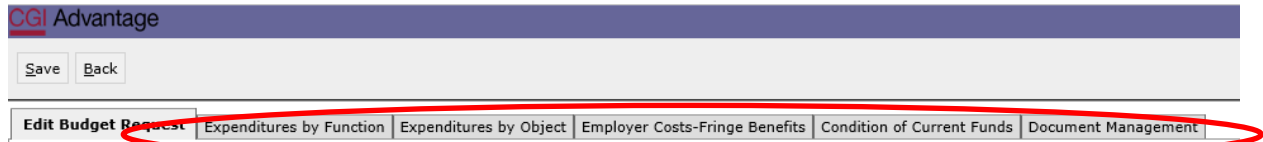
	Code	Name	Short Name	Element Type
Select	RES	Restricted Funds	RestrictedFunds	COA
Select	UNR	Unrestricted Funds	Unrestr. Funds	COA

Dimensions

Department:
 Auburn

Type:
 RestrictedFunds

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

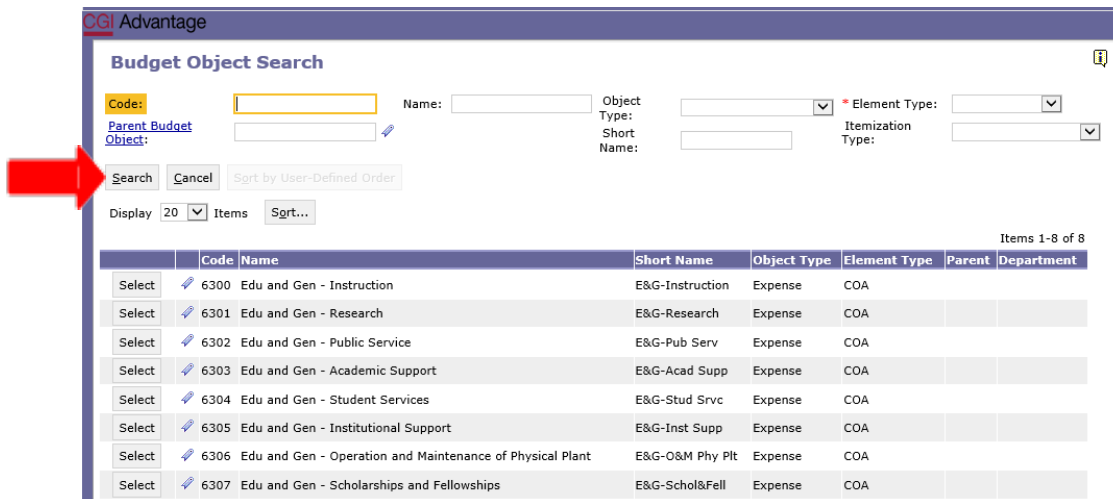
Step 1. Select the **Expenditures by Function** Tab.



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**.

The screenshot shows the 'Budget Object Search' screen. At the top is a purple header bar with the 'CGI Advantage' logo. Below the header is a light gray bar with 'Search' and 'Cancel' buttons. Underneath is a search form with fields for 'Code:', 'Name:', 'Object Type:', 'Element Type:', 'Parent Budget Object:', 'Short Name:', and 'Itemization Type:'. Below the search form is a table with columns: 'Code', 'Name', 'Short Name', 'Object Type', 'Element Type', 'Parent', and 'Department'. The table contains 7 rows of data, each with a 'Select' button to its left. The first row is highlighted.

	Code	Name	Short Name	Object Type	Element Type	Parent	Department
Select	6320	Edu and Gen - Salaries and Wages	E&G-Sal & Wage	Expense	COA		
Select	6321	Edu and Gen - Employee Benefits	E&G-Emp Bene	Expense	COA		
Select	6322	Edu and Gen - Supplies & Expenses	E&G-Supp & Exp	Expense	COA		
Select	6323	Edu and Gen - Equipment and Other Capital Assets	E&G-Equip&Cap	Expense	COA		
Select	6324	Edu and Gen - Recoveries from Sales or Services	E&G-Re Sal/Srv	Expense	COA		
Select	6325	Edu and Gen - Fuel and Metered Utilities	E&G-Fuel&Meter	Expense	COA		
Select	6326	Edu and Gen - Scholarships and Fellowships	E&G-Schol&Fell	Expense	COA		

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.

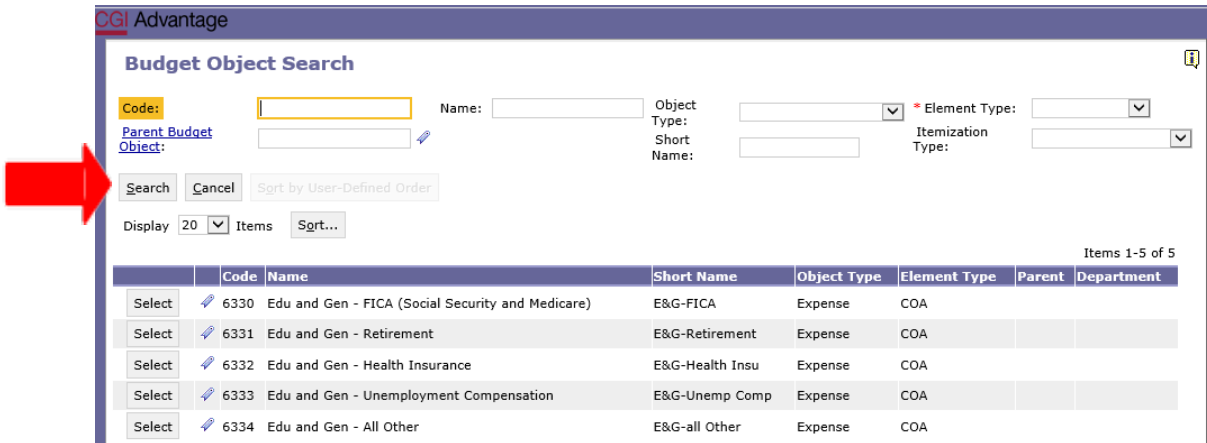
EMPLOYER COSTS-FRINGE BENEFITS TAB

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

The screenshot shows the top of the CGI Advantage application window. The title bar says 'CGI Advantage'. Below it is a toolbar with 'Save' and 'Back' buttons. At the bottom, there is a tabbed interface with four tabs: 'Edit Budget Request', 'Expenditures by Function', 'Expenditures by Object', and 'Employer Costs-Fringe Benefits'. The 'Employer Costs-Fringe Benefits' tab is currently selected and highlighted. A large red arrow points down to this 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.



CGI Advantage

Budget Object Search

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

 Display Items

	Code	Name	Short Name	Object Type	Element Type	Parent	Department
Select	6330	Edu and Gen - FICA (Social Security and Medicare)	E&G-FICA	Expense	COA		
Select	6331	Edu and Gen - Retirement	E&G-Retirement	Expense	COA		
Select	6332	Edu and Gen - Health Insurance	E&G-Health Insu	Expense	COA		
Select	6333	Edu and Gen - Unemployment Compensation	E&G-Unemp Comp	Expense	COA		
Select	6334	Edu and Gen - All Other	E&G-all Other	Expense	COA		

Items 1-5 of 5

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.



CGI Advantage

Edit Budget Request | Expenditures by Function | Expenditures by Object | Employer Costs-Fringe Benefits | **Condition of Current Funds**

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.

Budget Object Search

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

Display Items

Item Page: Items 1-20 of 164

	Code	Name	Short Name	Object Type	Element Type	Parent	Department
Select	6160	Edu and Gen - Mandatory	E&G Trans-Mand	Expense	COA		
Select	6161	Edu and Gen - Non Mandatory	E&G Tran-NonMan	Expense	COA		
Select	7000	Educational and General Beginning Balance	E & G Begin Bal	Revenue	COA		
Select	7001	ETF Appropriation - Operations and Maintenance	ETF App-O & M	Revenue	COA		
Select	7002	ETF Appropriation - Operations and Maintenance - Proration	ETF App-O&M Pro	Revenue	COA		
Select	7003	ETF Appropriation - Knight vs Alabama	ETF App-Kn vsAL	Revenue	COA		
Select	7004	ETF Appropriation - Special Line Items	ETF App-Spc Lin	Revenue	COA		
Select	7005	ETF Appropriation - Other Act(s)	ETF App Othr Ac	Revenue	COA		
Select	7006	ETF Appropriation - Art Program	ETF App-Art Pro	Revenue	COA		
Select	7007	ETF Appropriation - Agriculture Center Board	ETF App-Ag Ctr	Revenue	COA		
Select	7008	ETF Appropriation - Agricul Research & Extension State Match	ETF App-Ag Res	Revenue	COA		

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)

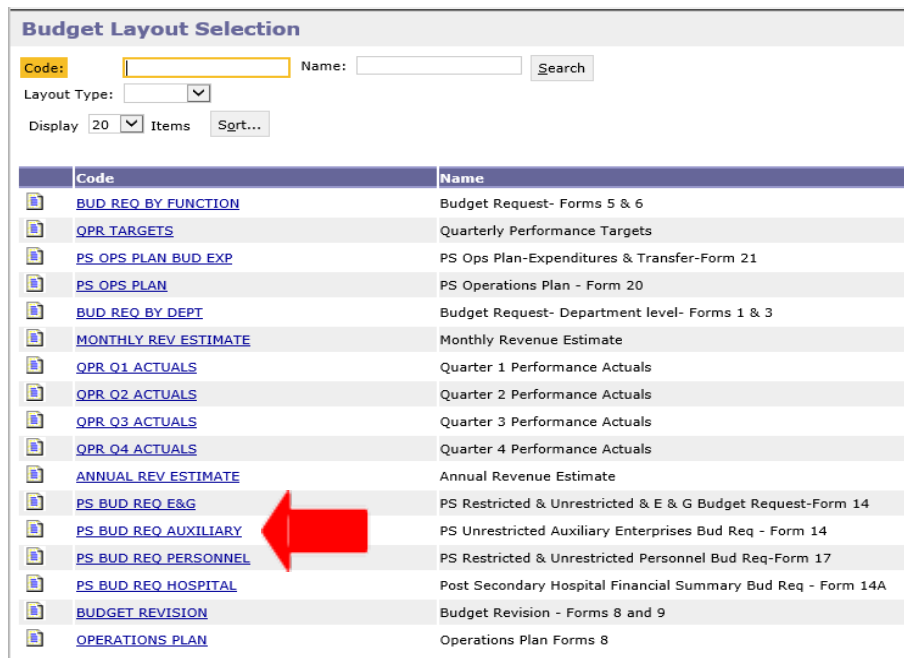
Mandatory
 Non-Mandatory

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**.



Budget Layout Selection

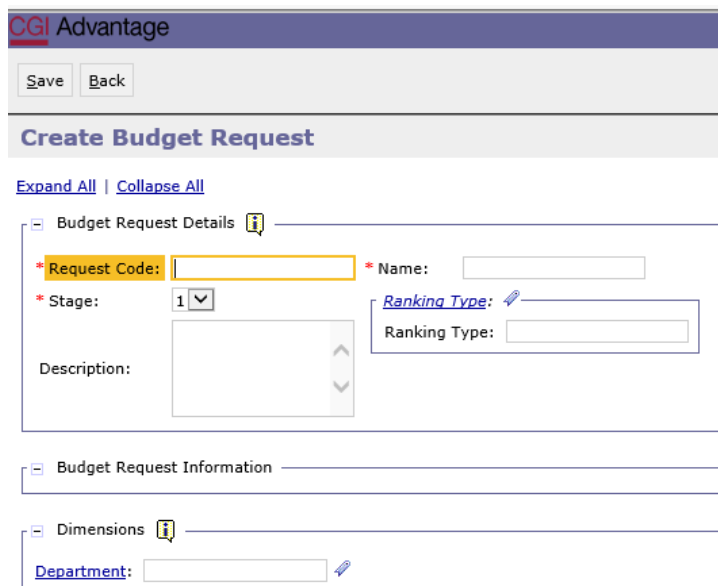
Code: Name:

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



CGI Advantage

Create Budget Request

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

☐ Budget Request Details

* Request Code: * Name:

* Stage:

Description:

Ranking Type:

☐ Budget Request Information

☐ Dimensions

Department:

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

CGI Advantage

Save Back

Create Budget Request

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

☐ Budget Request Details

* Request Code: 506 Form 14 Aux * Name: burn Main Form 14 Aux

* Stage: 1

Description:

[Ranking Type:](#) Ranking Type:

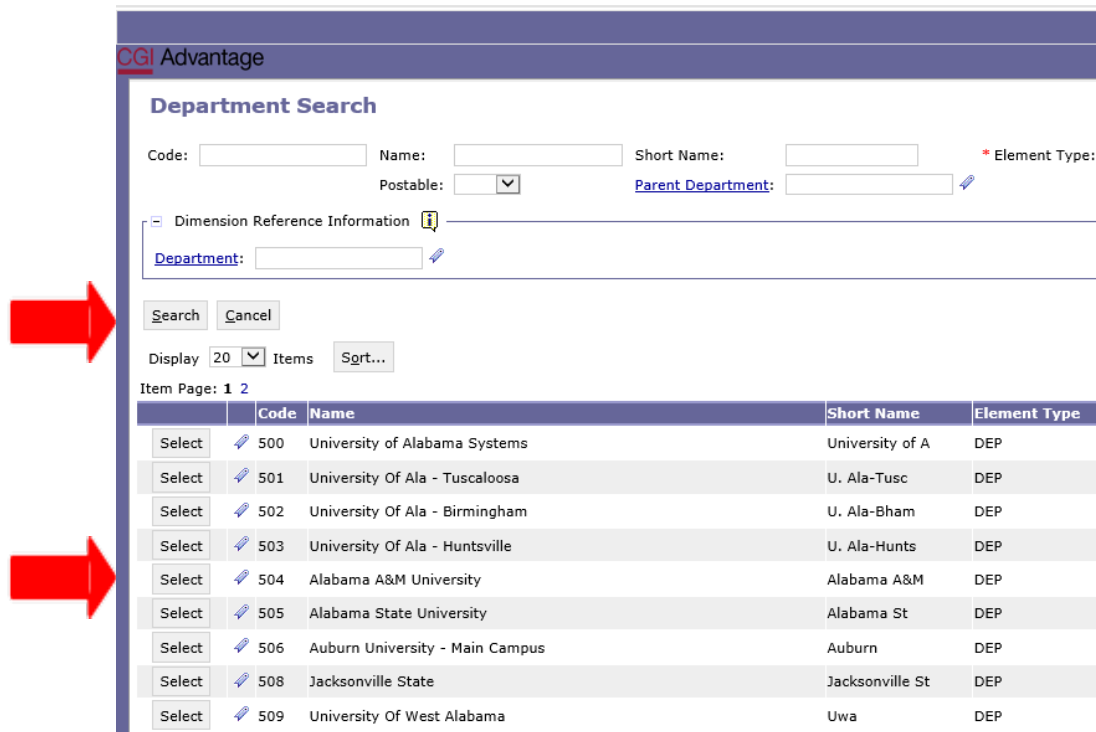
Step 4. Complete the **Dimensions** section in the bottom of the **Create Budget Request** screen by searching for each required field. Enter the institution's code or click on **Department**.

☐ Dimensions

[Department:](#) 506

The **Department Search** screen will appear.

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



CGI Advantage

Department Search

Code: Name: Short Name: * Element Type:
 Postable: Parent Department:

[-] Dimension Reference Information

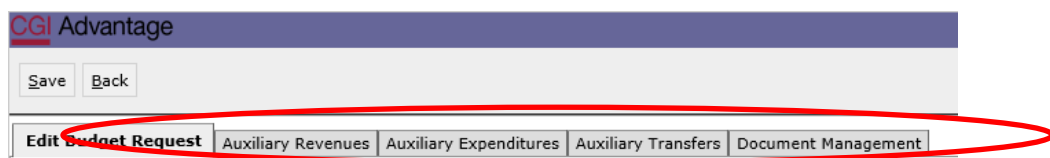
Department:

Display Items

Item Page: **1** 2

	Code	Name	Short Name	Element Type
Select	500	University of Alabama Systems	University of A	DEP
Select	501	University Of Ala - Tuscaloosa	U. Ala-Tusc	DEP
Select	502	University Of Ala - Birmingham	U. Ala-Bham	DEP
Select	503	University Of Ala - Huntsville	U. Ala-Hunts	DEP
Select	504	Alabama A&M University	Alabama A&M	DEP
Select	505	Alabama State University	Alabama St	DEP
Select	506	Auburn University - Main Campus	Auburn	DEP
Select	508	Jacksonville State	Jacksonville St	DEP
Select	509	University Of West Alabama	Uwa	DEP

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**.



CGI Advantage

Edit Budget Request Auxiliary Revenues Auxiliary Expenditures Auxiliary Transfers Document Management

AUXILIARY REVENUES TAB



CGI Advantage

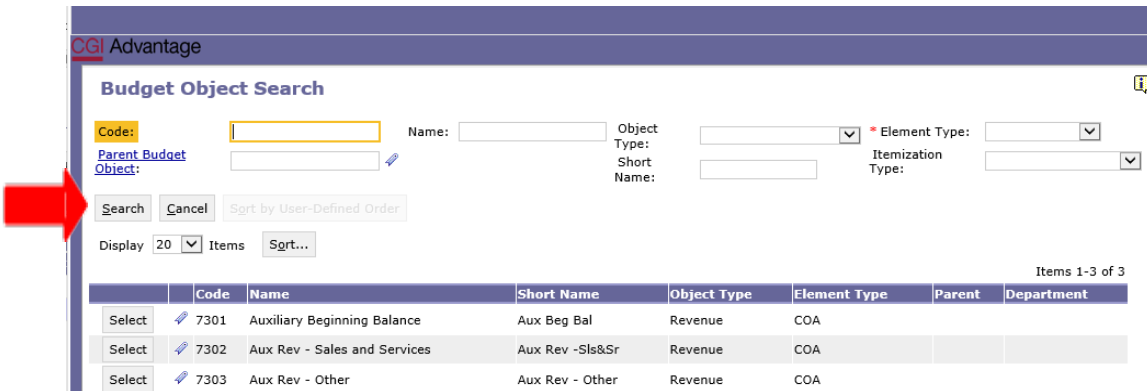
Auxiliary Revenues

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.



CGI Advantage

Budget Object Search

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

 Display Items

Items 1-3 of 3

	Code	Name	Short Name	Object Type	Element Type	Parent	Department
Select	7301	Auxiliary Beginning Balance	Aux Beg Bal	Revenue	COA		
Select	7302	Aux Rev - Sales and Services	Aux Rev -Sls&Sr	Revenue	COA		
Select	7303	Aux Rev - Other	Aux Rev - Other	Revenue	COA		

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.



CGI Advantage

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.

Budget Object Search

Code: Name: Object Type: Element Type: *
 Parent Budget Object: Itemization Type:
 Search Cancel Sort by User-Defined Order
 Display 20 Items Sgrt...

	Code	Name	Short Name	Object Type	Element Type	Parent	Department
Select	6450	Aux Exp - Salaries and Wages	Aux Exp-Sal&Wag	Expense	COA		
Select	6451	Aux Exp - Employee Benefits	Aux Exp-Emp Ben	Expense	COA		
Select	6452	Aux Exp - Supplies and Expenses	Aux Exp-Supp&Ex	Expense	COA		
Select	6453	Aux Exp - Equipment and Other Capital Assets	Aux Exp-Eq&Cap	Expense	COA		

Items 1-4 of 4

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.

CGI Advantage

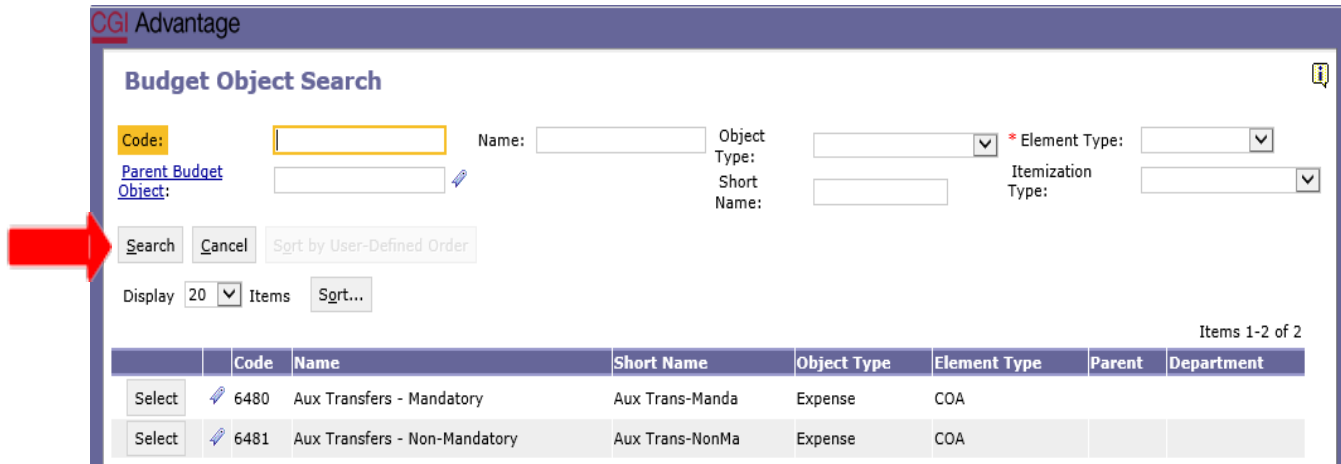
Save Back

Edit Budget Request Auxiliary Revenues Auxiliary Expenditures **Auxiliary Transfers**

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.



The screenshot shows the 'Budget Object Search' window in the CGI Advantage system. The window has a title bar 'CGI Advantage' and a subtitle 'Budget Object Search'. It contains several input fields: 'Code:' (highlighted with a yellow border), 'Parent Budget Object:', 'Name:', 'Object Type:', 'Short Name:', '* Element Type:', and 'Itemization Type:'. Below these fields are buttons for 'Search', 'Cancel', and 'Sort by User-Defined Order'. A red arrow points to the 'Search' button. Below the buttons is a 'Display' section with a dropdown set to '20' and a 'Sort...' button. At the bottom is a table with 8 columns: 'Code', 'Name', 'Short Name', 'Object Type', 'Element Type', 'Parent', and 'Department'. The table shows two items: '6480 Aux Transfers - Mandatory' and '6481 Aux Transfers - Non-Mandatory'. Each row has a 'Select' button and a pencil icon.

	Code	Name	Short Name	Object Type	Element Type	Parent	Department
Select	6480	Aux Transfers - Mandatory	Aux Trans-Manda	Expense	COA		
Select	6481	Aux Transfers - Non-Mandatory	Aux Trans-NonMa	Expense	COA		

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:

AUXILIARY 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 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.

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

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

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

Select Budget Request

Layout Code: Request Code:

Layout Type: Name:

Type:

Display ▾

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

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: 506 Form 17 RES * Name: Auburn Main Form 17 R

* Stage: 1

Description:

Ranking Type: ⓘ

Ranking Type:

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

Request Code Example:

506 Form 17 RES

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

Name Example:

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**.

Dimensions ⓘ

Department: 506 ⓘ Auburn

Type: RES ⓘ RestrictedFunds

The **Department Search** screen will appear.

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

CGI Advantage

Department Search

Code: Name: Short Name: * Element Type:
Postable: [Parent Department:](#)

Dimension Reference Information

[Department:](#)

Display Items

Item Page: **1** 2

	Code	Name	Short Name	Element Type
Select <input type="button" value="p"/>	500	University of Alabama Systems	University of A	DEP
Select <input type="button" value="p"/>	501	University Of Ala - Tuscaloosa	U. Ala-Tusc	DEP
Select <input type="button" value="p"/>	502	University Of Ala - Birmingham	U. Ala-Bham	DEP
Select <input type="button" value="p"/>	503	University Of Ala - Huntsville	U. Ala-Hunts	DEP
Select <input type="button" value="p"/>	504	Alabama A&M University	Alabama A&M	DEP
Select <input type="button" value="p"/>	505	Alabama State University	Alabama St	DEP
Select <input type="button" value="p"/>	506	Auburn University - Main Campus	Auburn	DEP
Select <input type="button" value="p"/>	508	Jacksonville State	Jacksonville St	DEP
Select <input type="button" value="p"/>	509	University Of West Alabama	Uwa	DEP

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.

Dimensions

[Department:](#)
Auburn

[Type:](#)
RestrictedFunds

CGI Advantage

Type Search

Code: Name: Short Name:
Postable: [Parent Type:](#)

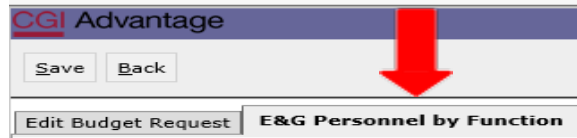
Display Items

	Code	Name	Short Name	Element Type
Select <input type="button" value="p"/>	RES	Restricted Funds	RestrictedFunds	COA
Select <input type="button" value="p"/>	UNR	Unrestricted Funds	Unrestr. Funds	COA

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.



CGI Advantage

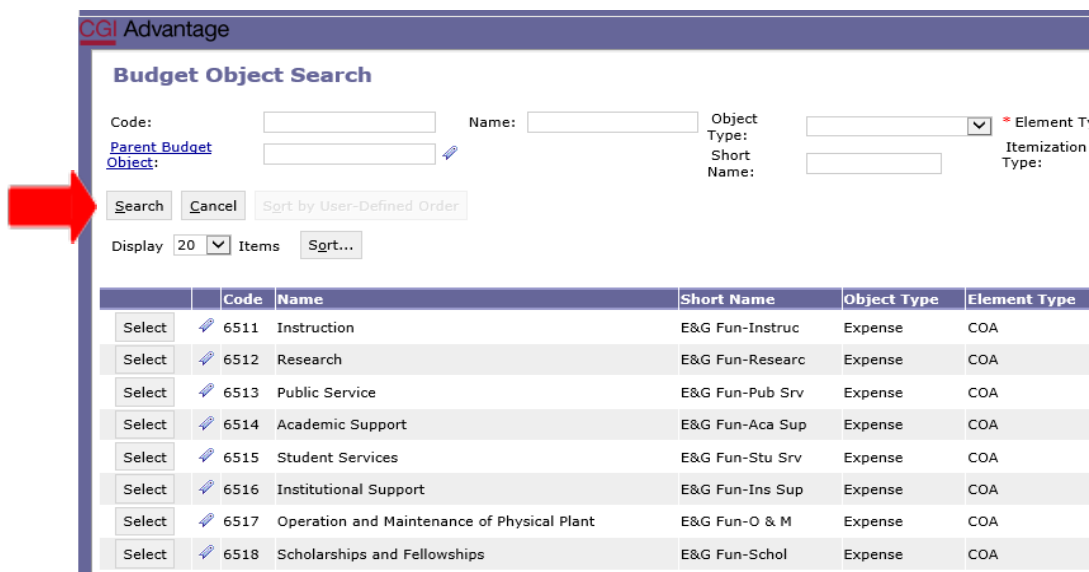
Save Back

Edit Budget Request **E&G Personnel by Function**

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 **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.



CGI Advantage

Budget Object Search

Code: Name: Object Type: * Element Type:
Parent Budget Object: Short Name: Itemization Type:
Search Cancel Sort by User-Defined Order
Display 20 Items Sort...

	Code	Name	Short Name	Object Type	Element Type
Select	6511	Instruction	E&G Fun-Instruc	Expense	COA
Select	6512	Research	E&G Fun-Researc	Expense	COA
Select	6513	Public Service	E&G Fun-Pub Srv	Expense	COA
Select	6514	Academic Support	E&G Fun-Aca Sup	Expense	COA
Select	6515	Student Services	E&G Fun-Stu Srv	Expense	COA
Select	6516	Institutional Support	E&G Fun-Ins Sup	Expense	COA
Select	6517	Operation and Maintenance of Physical Plant	E&G Fun-O & M	Expense	COA
Select	6518	Scholarships and Fellowships	E&G Fun-Schol	Expense	COA

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** will appear.

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

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



CGI Advantage

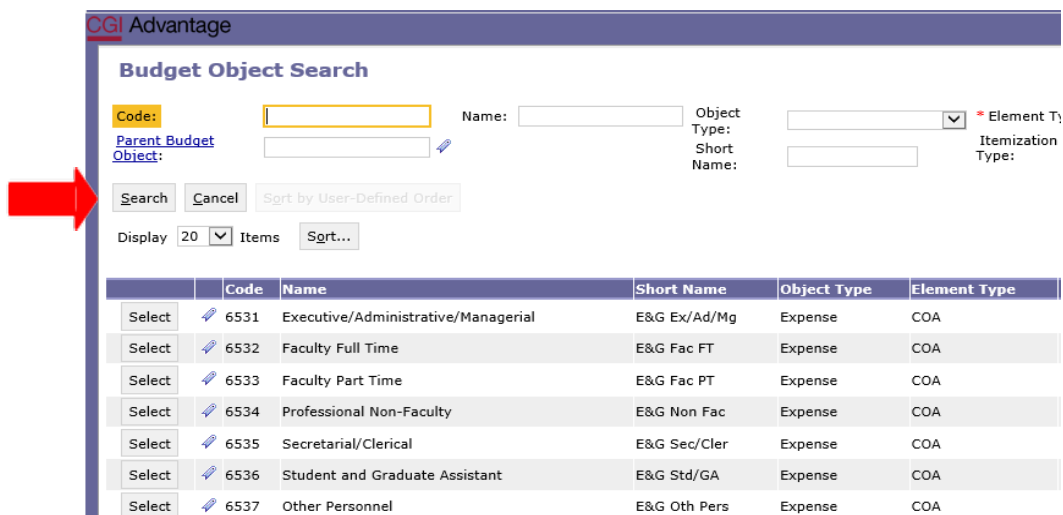
Save Back

Edit Budget Request E&G Personnel by Function **E&G Personnel by Occu Activity**

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.



CGI Advantage

Budget Object Search

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

Search Cancel Sort by User-Defined Order

Display 20 Items Sort...

	Code	Name	Short Name	Object Type	Element Type
Select	6531	Executive/Administrative/Managerial	E&G Ex/Ad/Mg	Expense	COA
Select	6532	Faculty Full Time	E&G Fac FT	Expense	COA
Select	6533	Faculty Part Time	E&G Fac PT	Expense	COA
Select	6534	Professional Non-Faculty	E&G Non Fac	Expense	COA
Select	6535	Secretarial/Clerical	E&G Sec/Cler	Expense	COA
Select	6536	Student and Graduate Assistant	E&G Std/GA	Expense	COA
Select	6537	Other Personnel	E&G Oth Pers	Expense	COA

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 /

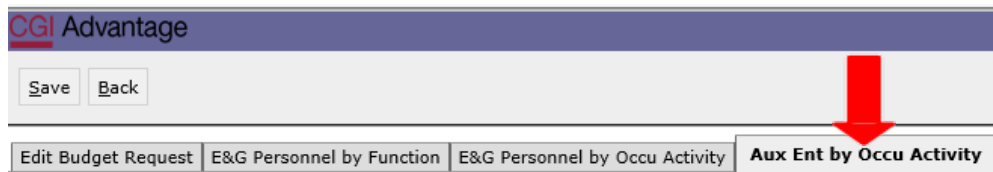
Student and

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.



CGI Advantage

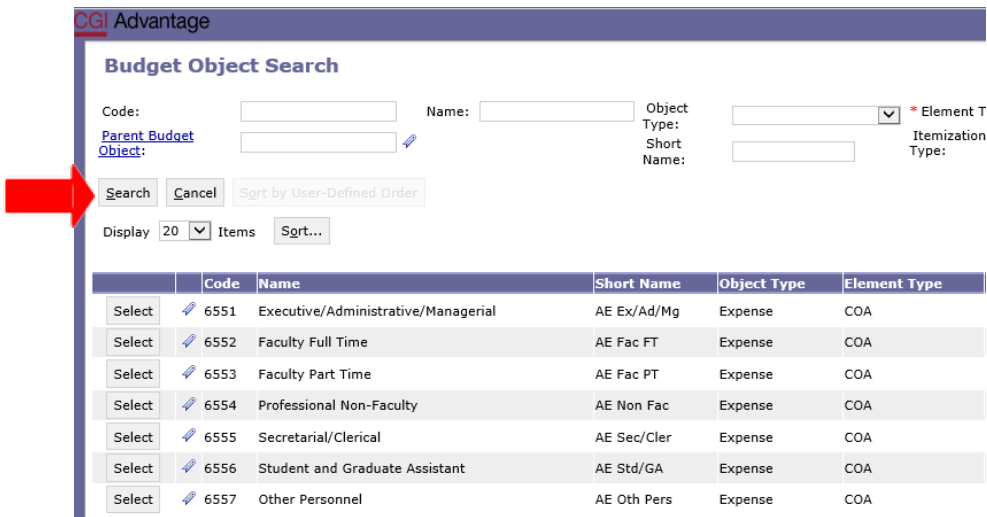
Save Back

Edit Budget Request E&G Personnel by Function E&G Personnel by Occu Activity **Aux Ent by Occu Activity**

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.



CGI Advantage

Budget Object Search

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

Search Cancel Sort by User-Defined Order

Display 20 Items Sgrt...

	Code	Name	Short Name	Object Type	Element Type
Select	6551	Executive/Administrative/Managerial	AE Ex/Ad/Mg	Expense	COA
Select	6552	Faculty Full Time	AE Fac FT	Expense	COA
Select	6553	Faculty Part Time	AE Fac PT	Expense	COA
Select	6554	Professional Non-Faculty	AE Non Fac	Expense	COA
Select	6555	Secretarial/Clerical	AE Sec/Cler	Expense	COA
Select	6556	Student and Graduate Assistant	AE Std/GA	Expense	COA
Select	6557	Other Personnel	AE Oth Pers	Expense	COA

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

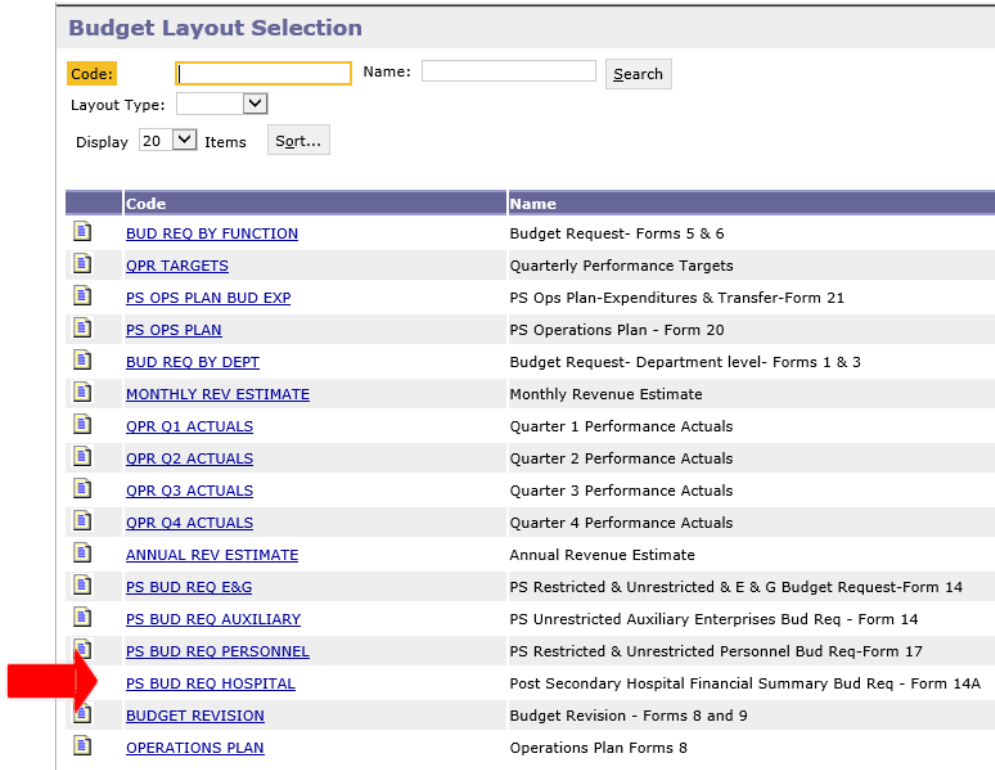
Other Personnel

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.



Budget Layout Selection

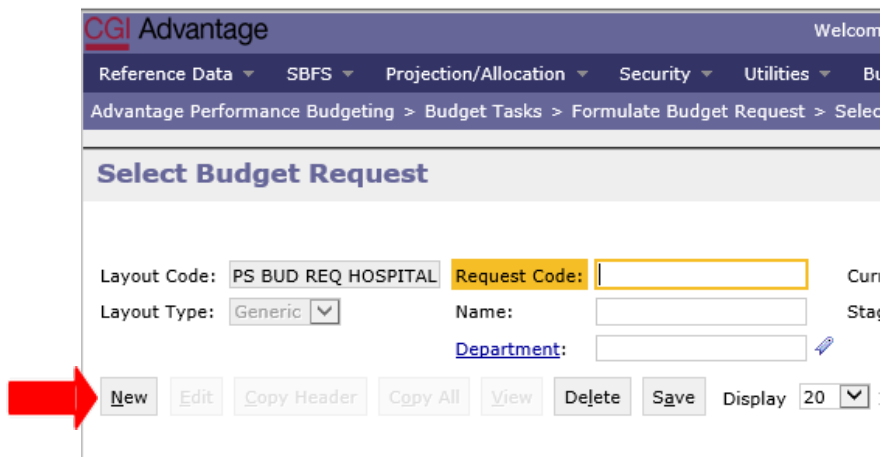
Code: Name: Search

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 Welcom

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

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

Select Budget Request

Layout Code: PS BUD REQ HOSPITAL Request Code: Cur

Layout Type: Generic ▾ Name: Sta

Department:

New Edit Copy Header Copy All View Delete Save Display 20 ▾

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

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: * Name:

* Stage: Ranking Type:

Description:

Budget Request Information

Dimensions ⓘ

Department:

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

CGI Advantage

Save Back

Create Budget Request

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

Budget Request Details ⓘ

* Request Code: 512 USA FORM 14A * Name: USA Form 14A

* Stage: 1 Ranking Type:

Description:

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.



Dimensions 

Department: 512 
U. South Ala

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.**



CGI Advantage

Edit Budget Request | Revenues | Expenditures, Transfers & AR | Personnel | 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.

A screenshot of the 'Budget Object Search' screen in the CGI Advantage software. The screen has a purple header bar with 'CGI Advantage' in red and blue. Below the header, the title 'Budget Object Search' is displayed. There are several input fields: 'Code:', 'Name:', 'Object Type:', 'Short Name:', and 'Element Type:'. A red arrow points to the 'Search' button, which is located next to the 'Code:' field. Below the search fields, there are buttons for 'Cancel' and 'Sort by User-Defined Order'. At the bottom, there is a table with columns: 'Code', 'Name', 'Short Name', 'Object Type', and 'Element Type'. The table contains 12 rows of data, each starting with a 'Select' button and a small icon. The data includes various budget codes and names, such as '7500 BALANCE BROUGHT FORWARD AT BEGINNING OF YEAR' and '7501 Patient Service'.

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.














Budget Object Search

Code:
Name:
Object Type:
* Element Ty

Parent Budget Object:
Object Type: Short Name:
Itemization Type:

Display Items

	Code	Name	Short Name	Object Type	Element Type
Select 	6701	Salaries and Wages	AS Sal & Wage	Expense	COA
Select 	6702	Employee Benefits	AS Emp Ben	Expense	COA
Select 	6703	Supplies and Expenses	AS Sup & Exp	Expense	COA
Select 	6704	Equipment and Other Capital Assets	AS Equ & Cap	Expense	COA
Select 	6711	Salaries and Wages	N & P Sal & Wag	Expense	COA
Select 	6712	Employee Benefits	N & P Emp Ben	Expense	COA
Select 	6713	Supplies and Expenses	N & P Sup & Exp	Expense	COA
Select 	6714	Equipment and Other Capital Assets	N & P Equ & Cap	Expense	COA
Select 	6721	Salaries and Wages	O & M Sal & Wag	Expense	COA
Select 	6722	Employee Benefits	O & M Emp Ben	Expense	COA
Select 	6723	Supplies and Expenses	O & M Sup & Exp	Expense	COA

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:

<u>Expenditures</u>
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.

The screenshot shows the top of the CGI Advantage application. At the top is a blue header bar with the text "CGI Advantage". Below this is a grey bar containing "Save" and "Back" buttons. Underneath is a navigation bar with several tabs: "Edit Budget Request", "Revenues", "Expenditures, Transfers & AR", and "Personnel". The "Personnel" tab is highlighted in blue. A large red arrow points down to 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.

The screenshot shows the "Budget Object Search" screen. At the top is a blue header bar with the text "CGI Advantage". Below this is a grey bar with the text "Budget Object Search". The screen contains several input fields: "Code:", "Parent Budget Object:", "Name:", "Object Type:", "Short Name:", and "Element Type:". There are also "Search" and "Cancel" buttons. A red arrow points to the "Search" button. Below the input fields is a table with the following columns: "Code", "Name", "Short Name", "Object Type", and "Element Type". The table contains seven rows of data, each with a "Select" button to its left.

	Code	Name	Short Name	Object Type	Element Type
Select	6811	Executive/Administrative/Managerial	HP Ex/Ad/Mg	Expense	COA
Select	6812	Faculty Full Time	HP Fac FT	Expense	COA
Select	6813	Faculty Part Time	HP Fac PT	Expense	COA
Select	6814	Professional Non-Faculty	HP Non Fac	Expense	COA
Select	6815	Secretarial/Clerical	HP Sec/Cler	Expense	COA
Select	6816	Student and Graduate Assistant	HP Std/GA	Expense	COA
Select	6817	Other Personnel	HP Oth Pers	Expense	COA

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**

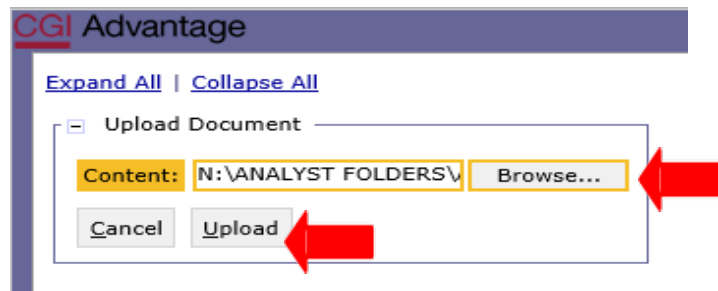
Please use the below format for naming documents:

Example: FY 25 510 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.

Edit Budget Request	Expenditures by Function	Expenditures by Object	Employer Costs-Fringe Benefits	Condition of Current Funds	Document Management
---------------------	--------------------------	------------------------	--------------------------------	----------------------------	----------------------------

Display Items

File Name	Content Type	Last Modified Timestamp
 FY21 510 Postsecondary Budget Request.pdf	application/pdf	11/06/2019 17:33:57

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

File Name:

Last Modified Timestamp:

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.

Budget Request Inbox

Layout Code: Stage:
Request Code: Included in Ranking:
Workflow Status:

[View](#) [Edit](#) [Assign](#) [Submit](#) [Approve](#) [Reject](#) [History](#) Display Items [Sc](#)

	Request Code	Name	Layout Code
	510 FORM 14 AUX	510 Form 14 AUX	PS BUD REQ AUXILIARY
<input checked="" type="checkbox"/>	510 FORM 14 UNR	UM Form 14 UNR	PS BUD REQ E&G
	510 FORM 17 UNR	UM Form 17 UNR	PS BUD REQ PERSONNEL
	510 FORM 17 RES	UM Form 17 RES	PS BUD REQ PERSONNEL
	510 FORM 14 RES	UM Form 14 RES	PS BUD REQ E&G

[Go to top of page](#)

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

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

Submit Budget Request

Comments:

[Confirm](#) [Cancel](#)

[Add Approver](#) [Remove Approver](#) [moveUp](#) [moveDown](#) [Sort...](#)

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**.

Budget Request Inbox

Layout Code: Stage:
Request Code: Included in Ranking:
Workflow Status:

User/ID:

Display Items

	Request Code	Name	Layout Code
<input type="checkbox"/>	510 FORM 14 AUX	510 UM Form 14 AUX	PS BUD REQ AUXILIARY
<input checked="" type="checkbox"/>	510 FORM 14 UNR	UM Form 14 UNR	PS BUD REQ E&G
<input type="checkbox"/>	510 FORM 17 UNR	UM Form 17 UNR	PS BUD REQ PERSONNEL
<input type="checkbox"/>	510 FORM 17 RES	UM Form 17 RES	PS BUD REQ PERSONNEL
<input type="checkbox"/>	510 FORM 14 RES	UM Form 14 RES	PS BUD REQ E&G

[Go to top of page](#)

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

CGI Advantage

Reject Budget Request

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

☐ Reject Budget Request Confirmation

Comments:

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.

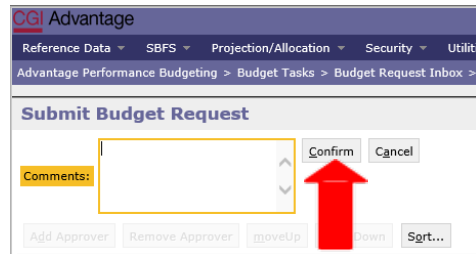
I think this is ready to go to EBO. Let me know if you find any issues. https://STAARS-SHR.ALABAMA.GOV:1443/SH4APB1J1/Controller?EVENT_endState=%2F%2FBudgetInstance%2FMaintenance&code=066%20OP%20REVISION%202&EVENT_transition=budgetFormEmailQuery&layoutType=G&layoutCode=BUDGET%20REVISION

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.

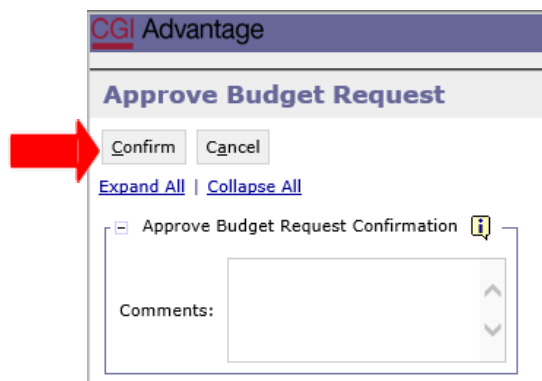
Additional Option - Reject

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**.






Budget Request Inbox

Layout Code: Stage:

Request Code: Included in Ranking: [User/ID:](#)

Workflow Status:

Display Items

<input type="checkbox"/>	Request Code	Name	Layout Code
 <input type="checkbox"/>	510 FORM 14 AUX	510 UM Form 14 AUX	PS BUD REQ AUXILIARY
 <input checked="" type="checkbox"/>	510 FORM 14 UNR	UM Form 14 UNR	PS BUD REQ E&G
 <input type="checkbox"/>	510 FORM 17 UNR	UM Form 17 UNR	PS BUD REQ PERSONNEL
 <input type="checkbox"/>	510 FORM 17 RES	UM Form 17 RES	PS BUD REQ PERSONNEL
 <input type="checkbox"/>	510 FORM 14 RES	UM Form 14 RES	PS BUD REQ E&G

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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).