Budget Workbook for Agencies Job Aid

The process flow below outlines the steps which need to be completed in order for the Budget Definition to become a Budget Workbook.

Agency

Provider

\*Provider Entity is not specifically tied to the Budget Workbook; the **Provider** completes this when they have access to the Supplier Portal.

# Provider Program Information Entry

The following shows how to update the Provider Program Information.

**Navigation:** Supplier Contracts > Budgeting > Provider Program Information

The Provider Program Information page will display.

Enter or search for the **Contract ID, Funding Period**, or **Supplier Name,** and click **Search**



Select the **Contract ID** from the search results



The Provider Program Information is broken down into three tabs

Select Yes/No for the **Statewide** field (The default is Yes)

If No is selected, enter at least one of the **Catchment Areas,** **City/Town,** or **Region** fields



Enter in Program Contacts.

Look up the **Program Code** (using the magnifying glass). Only programs that were created on the Budget Definition can be selected.

Enter the **Service Address**

Select **Contact Type**

Enter **Name, Telephone, Email ID,** and **Days & Hrs of Operation**

Click on the **+ sign** to add additional Contacts

Click **Save**



Click on the **Schedule C** tab

Note: The Schedule C tab will only appear if it has been checked on the Budget Definition Page.





Select Yes/No to the question in the Schedule C Related Parties section

If Yes, enter **Name of Related Party, Address, Description of Goods/Services Provided, Identify Costs Claimed in Report, Costs Included in this Report,** and **Actual Cost Related to Party** fields.

Click **Save**



Click on the **Attachments** tab

The attachments tab can be used for any additional documentation.



Enter the **Attachment Description** and click on **Add Attachment**

Click **Browse**

Select the attachment to be uploaded and click **Upload**



Click **View Attachment** to review the document

Use the **+ sign** to add more attachments

Click **Save**

