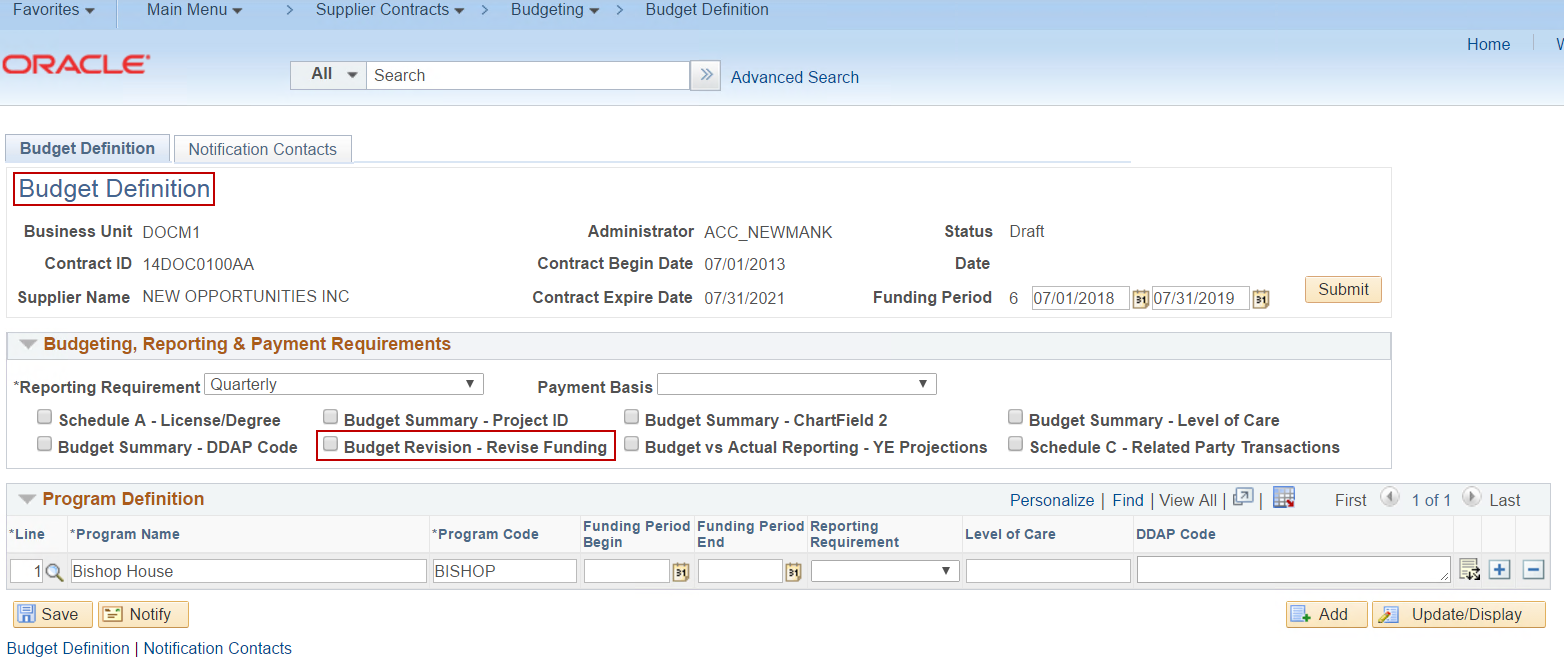
Agency Budget Revision Job Aid

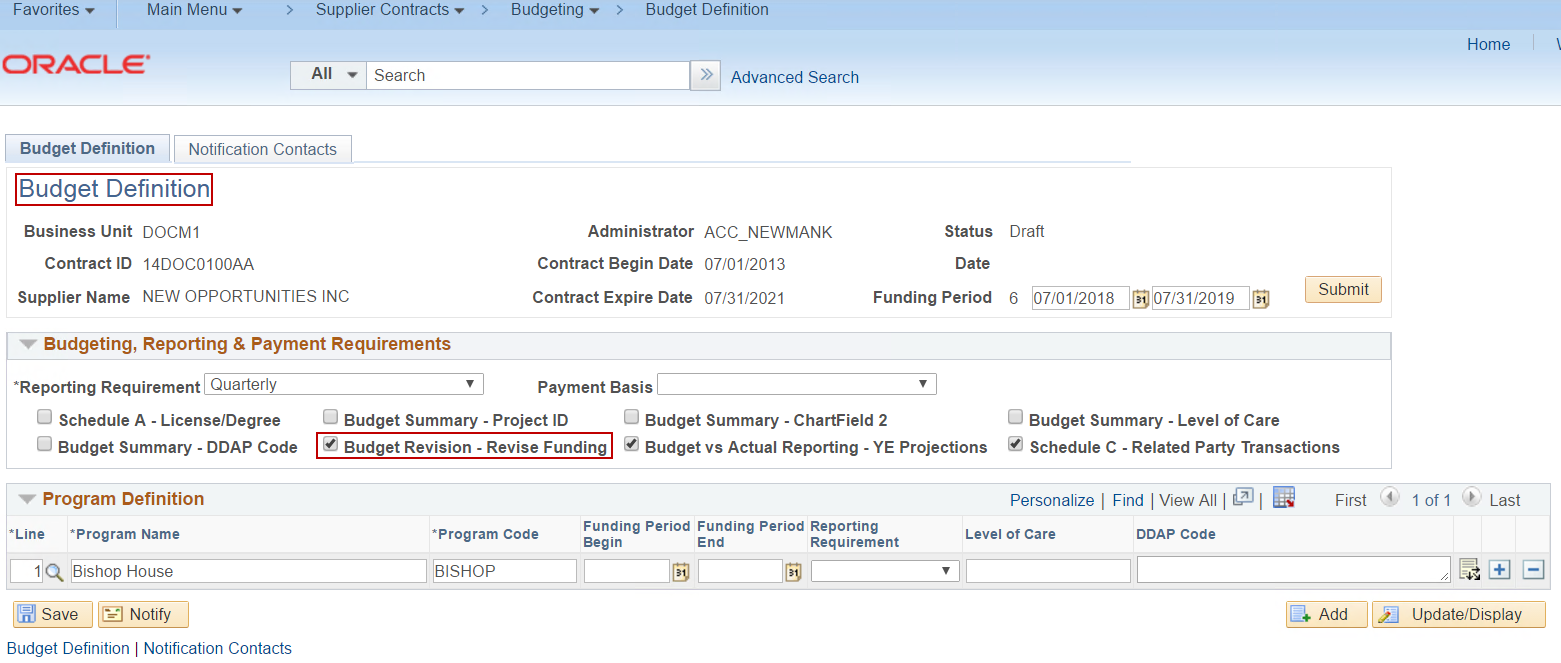
Once an Accepted Budget Summary exists, the agency budget processor may initiate a Budget Revision. The Budget Revision job aid provides the steps to complete a Contract Budget revision based on two Budget Definition configuration scenarios:

1. Budget Definition > Budgeting, Reporting & Payment Requirements > **Budget Revision – Revise Funding checkbox** is **UNCHECKED**.



1. Budget Definition > Budgeting, Reporting & Payment Requirements > **Budget Revision – Revise Funding checkbox** is **CHECKED**.

*\*Checking the Budget Revision – Revise Funding checkbox gives both the agency processor and provider user the ability to re-allocate existing 4100 CONTRACT FUNDING values on the Budget Revision page.*

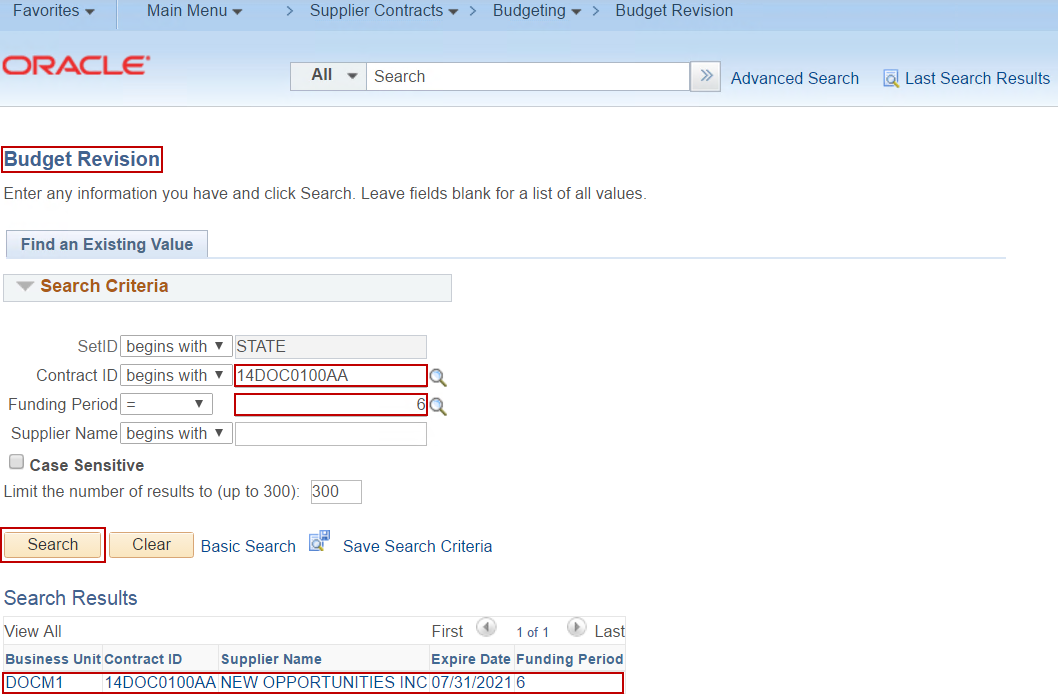


***Scenario 1****: Budget Definition > Budgeting, Reporting & Payment Requirements >* ***Budget Revision – Revise Funding checkbox*** *is* ***UNCHECKED****.*

**Step 1**: Navigate to **Budget Revision** page.

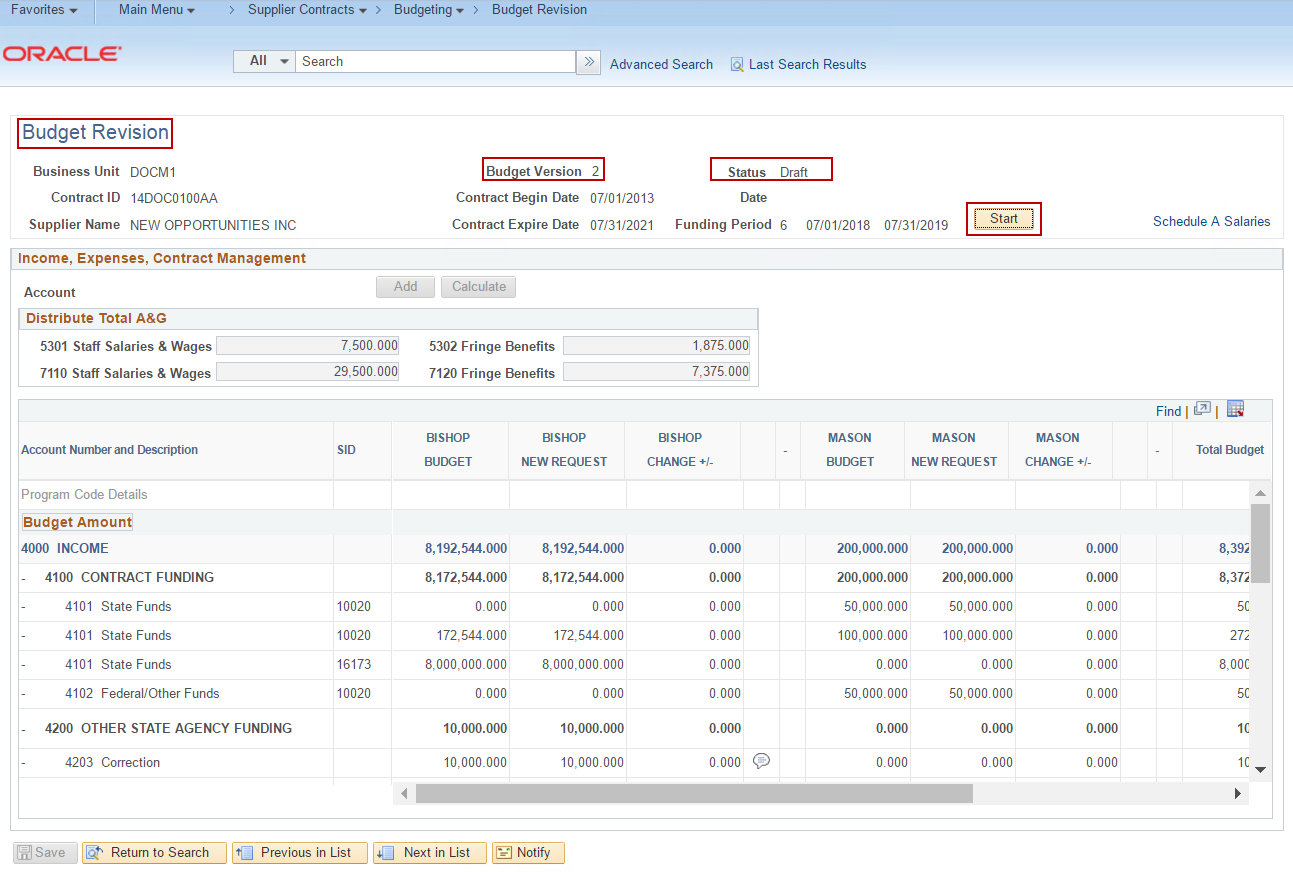
**Navigation:** Supplier Contracts > Budgeting > Budget Revision

1. **Budget Revision Search** page is displayed.
2. Click the **Search** button for all available Contract IDs to appear in the **Search Results**, **or**
3. Enter a **Contract ID**, **or**
4. Enter a **Contract ID** and **Funding Period**.
5. Click the **Search** button.
6. Click on correct **Search Result**.



**Step 2**: Start **Budget Revision**.

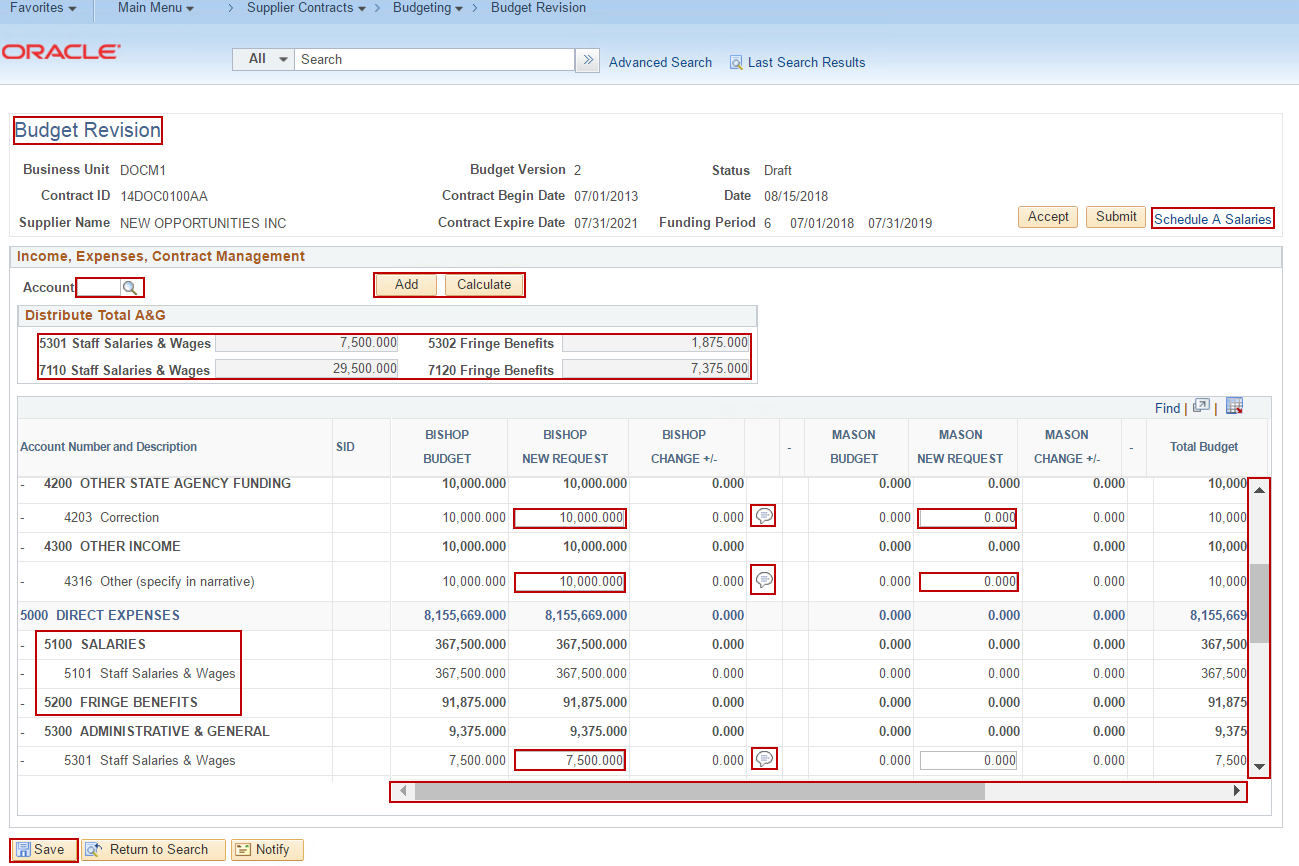
1. **Budget Revision** page is displayed.
2. Click the **Start** button.
3. **Start** button initiates the **Budget Revision**, making the **Budget Revision New Request fields**, **Schedule A Salaries**, and **Budget Definition** editable.



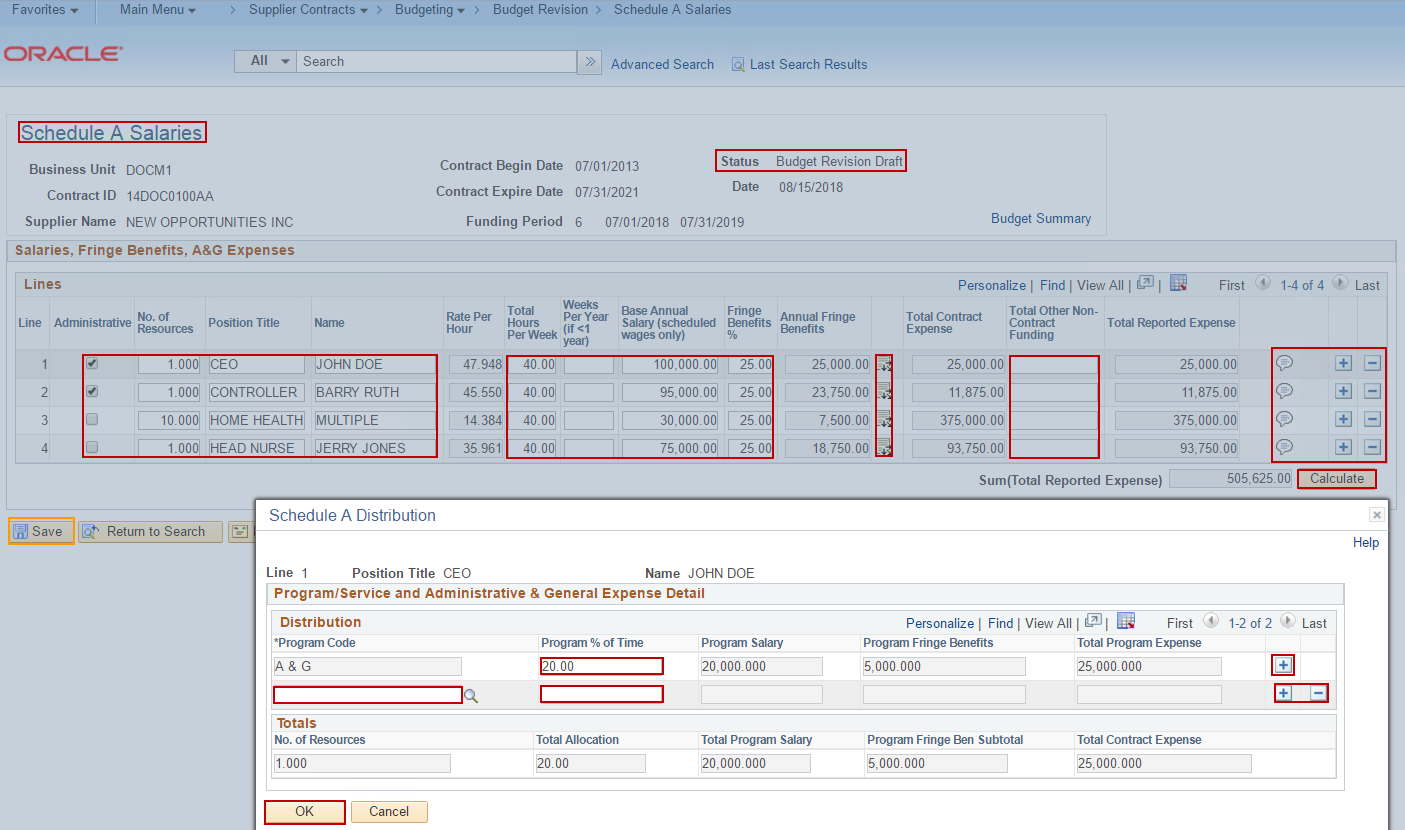
**Step 3**: Re-allocate **existing** and/or add **new** **4200 OTHER STATE AGENCY FUNDING**, **4300 OTHER INCOME**, **5000 DIRECT EXPENSES**, and **7000 INDIRECT EXPENSES** accounts/values.

*\*\*Adjustments to 5100 SALARIES, 5200 FRINGE BENEFITS, 5300 A&G (DIRECT), and 7100 A&G (INDIRECT) accounts and values must be completed in Schedule A Salaries. Specifically for A&G updates, the values must be updated in Schedule A Salaries and then manually re-distributed between Program(s) in the NEW REQUEST column(s) in Budget Revision.*

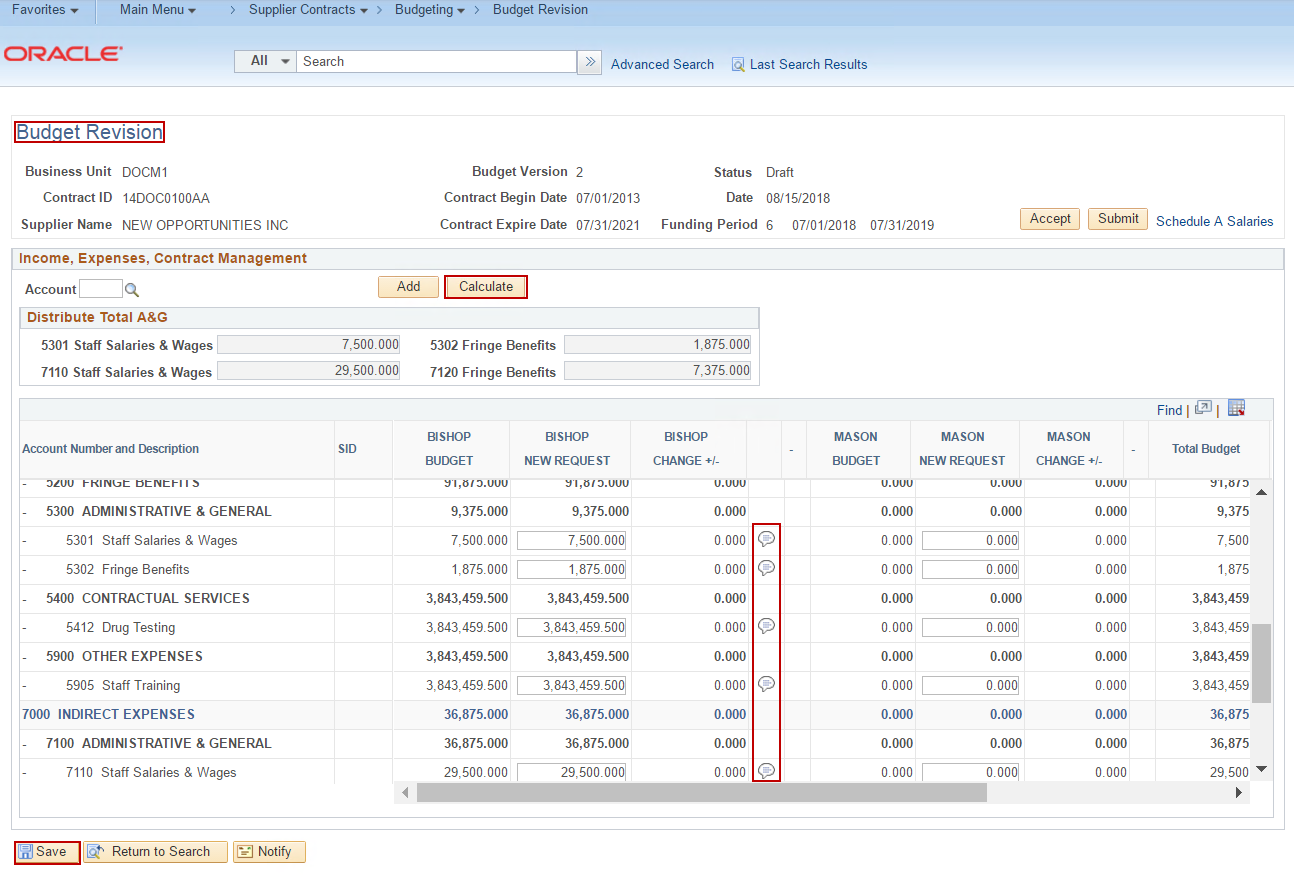
1. Re-allocate existing account values in the **NEW REQUEST** column(s).
2. Click **Justification** icon and enter **Justification** for each edited field.
3. Click **Calculate** button to update **TOTALS**.
4. Add new Accounts and values using the **Account lookup** field and **Add** button.
5. Click **Justification** icon and enter **Justification** for each added field.
6. Click **Calculate** button to update **TOTALS**.
7. Click **Save**.
8. If **Schedule A Salaries** updates are required, navigate to **Schedule A Salaries** via the link on Budget Revision or directly through the menu.



1. **Schedule A Salaries** page is displayed.
2. Update/add/delete **Line(s)** and fields.
3. Click **Save**.
4. Click **Distribution icon** to update/add/delete **Distribution Line(s)**.
5. Click **OK**.
6. Click **Justification** icon to update comments for edited/added **Lines**.
7. Click **Save**.
8. Navigate back to **Budget Revision** by clicking on the open **Budget Revision** tab.



1. **Budget Revision** page is displayed.
2. Click **Calculat**e button.
3. Click **Justification** icon and enter **Justification** for edited/added fields.
4. Click **Save**.

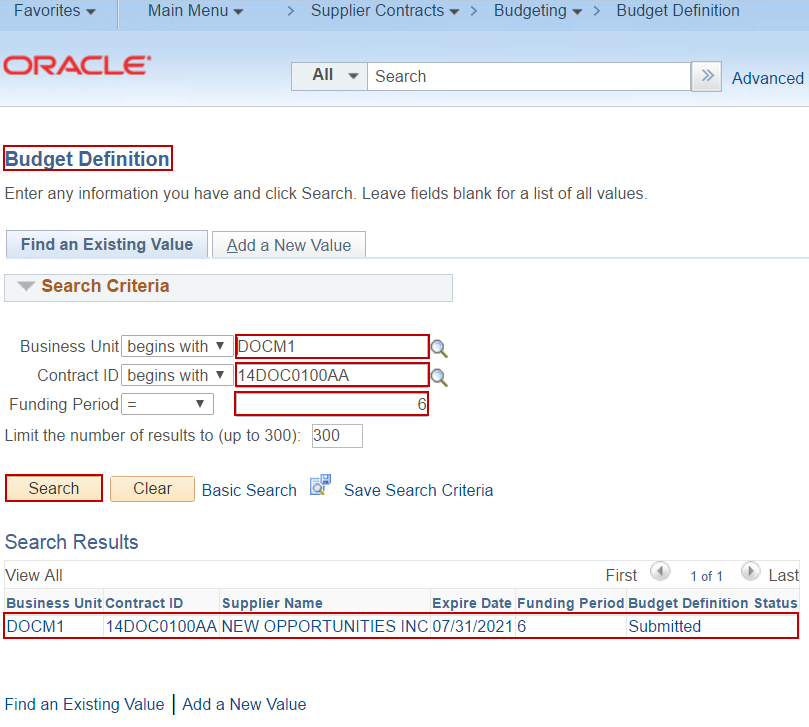


**Step 4**: Re-allocate **4100 CONTRACT FUNDING** values between **Existing Accounts** or add **New Accounts** and/or add **New Program Codes** by navigating to the **Submitted Budget Definition** page.

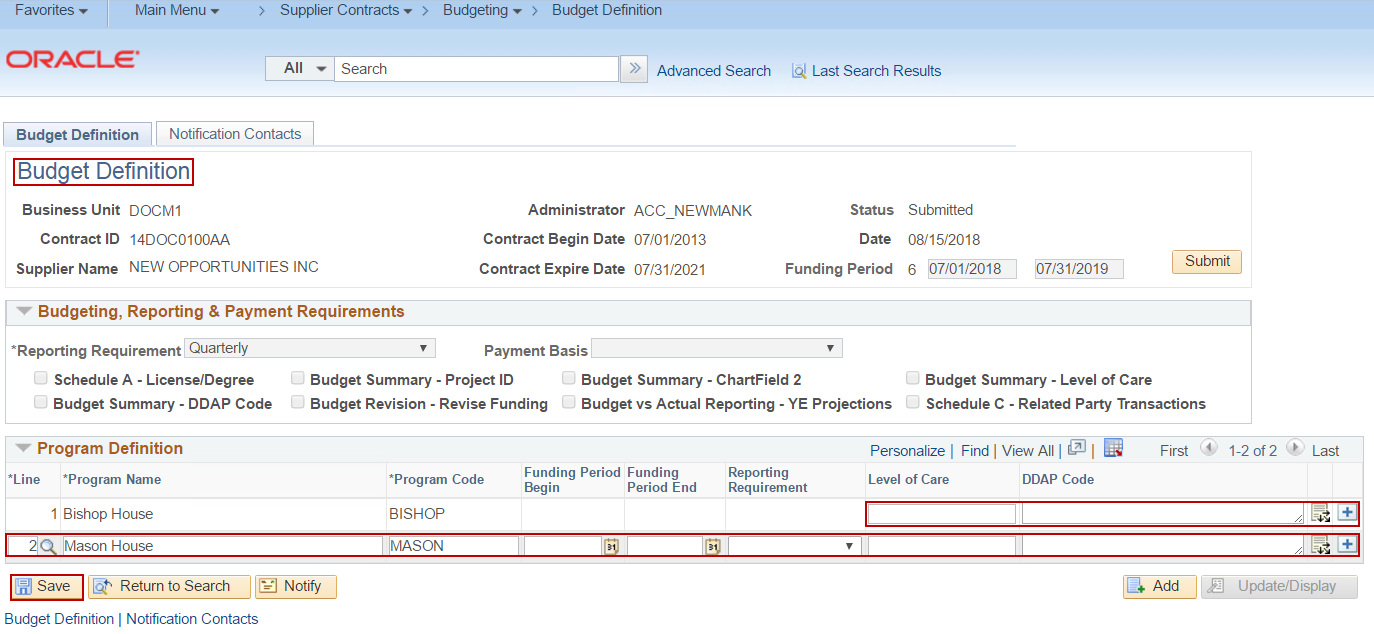
*\*\*Adjustments to 4100 CONTRACT FUNDING accounts and values must be completed via the Budget Definition page due to the Budget Revision – Revise Funding checkbox not being checked on the Submitted Budget Definition.*

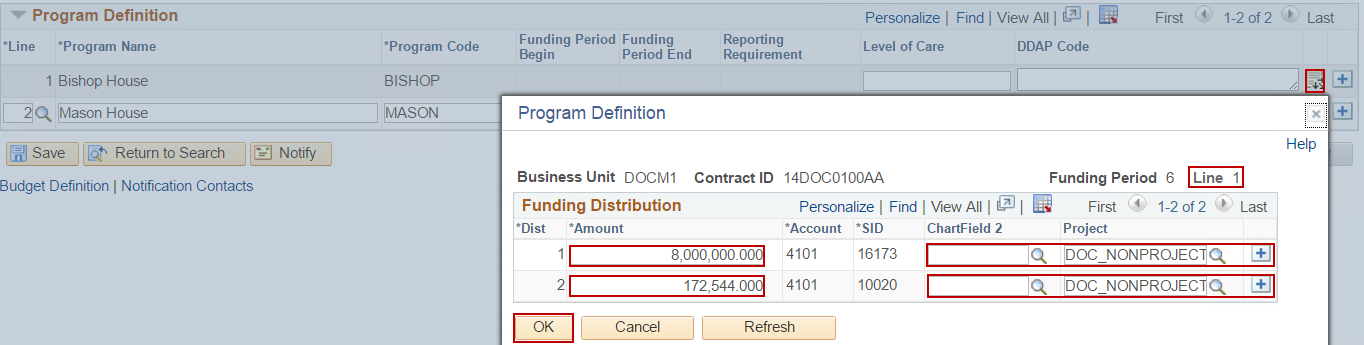
**Navigation:** Supplier Contracts > Budgeting > Budget Definition

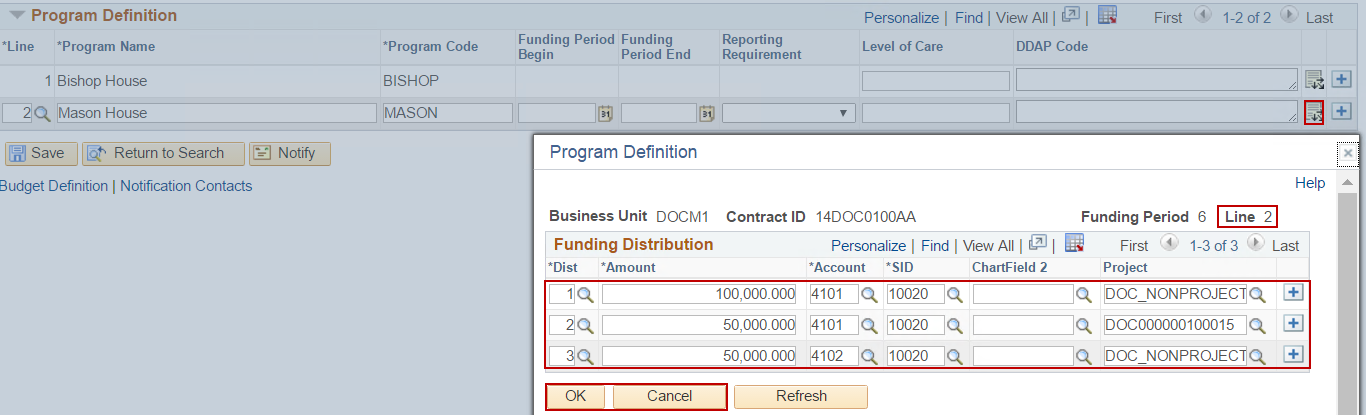
1. **Budget Definition Search** page is displayed.
2. Click the **Search** button for all available Contract IDs to appear in the **Search Results**, **or**
3. Enter a **Business Unit**, **and/or**
4. Enter a **Contract ID**, **or**
5. Enter a **Contract ID** and **Funding Period**.
6. Click the **Search** button.
7. Click on correct **Search Result**.



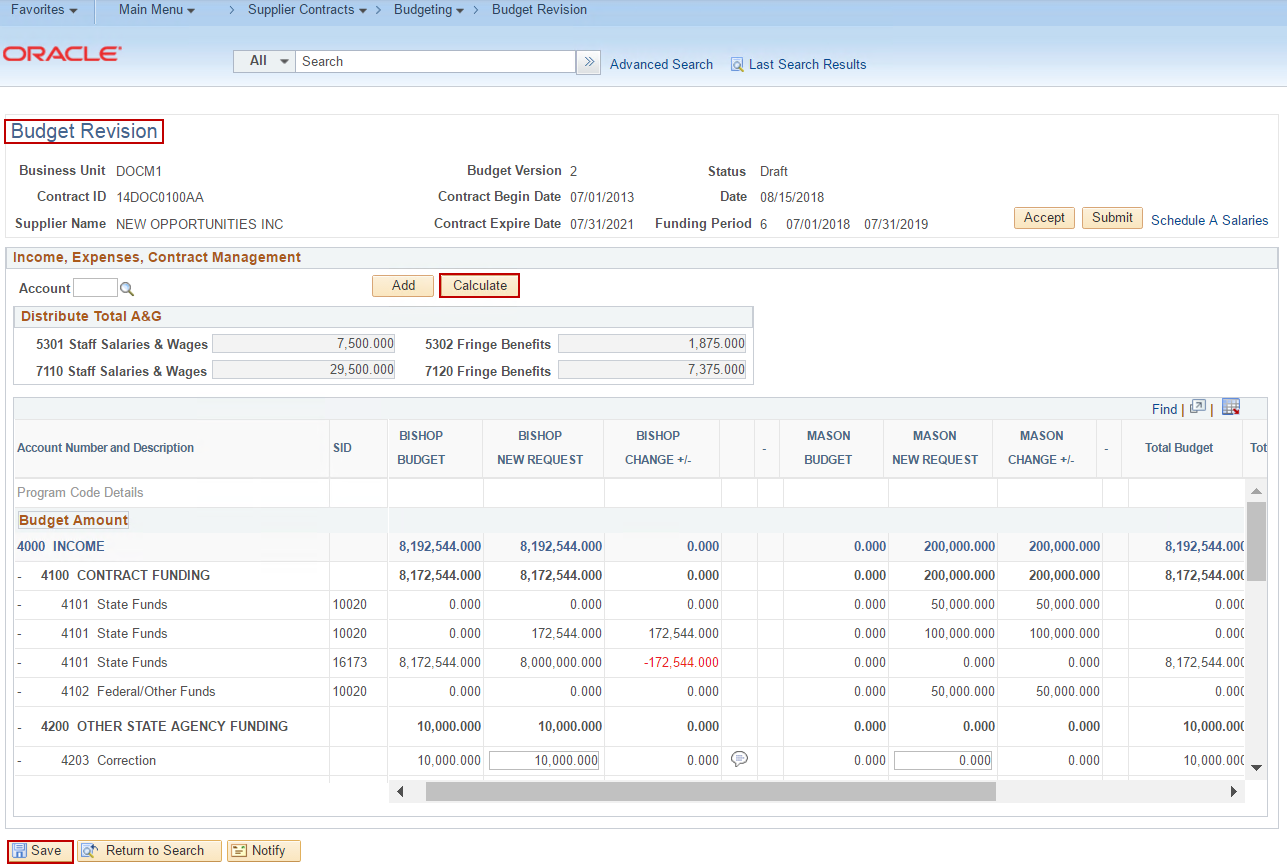
1. Budget Definition page is displayed.
2. Update/add **Line(s)** and fields.
3. Click **Save**.
4. Click **Distribution icon** to update/add **Distribution Line(s)**.
5. Click **OK**.
6. Click **Save**.
7. Navigate back to **Budget Revision** through the Menu navigation.





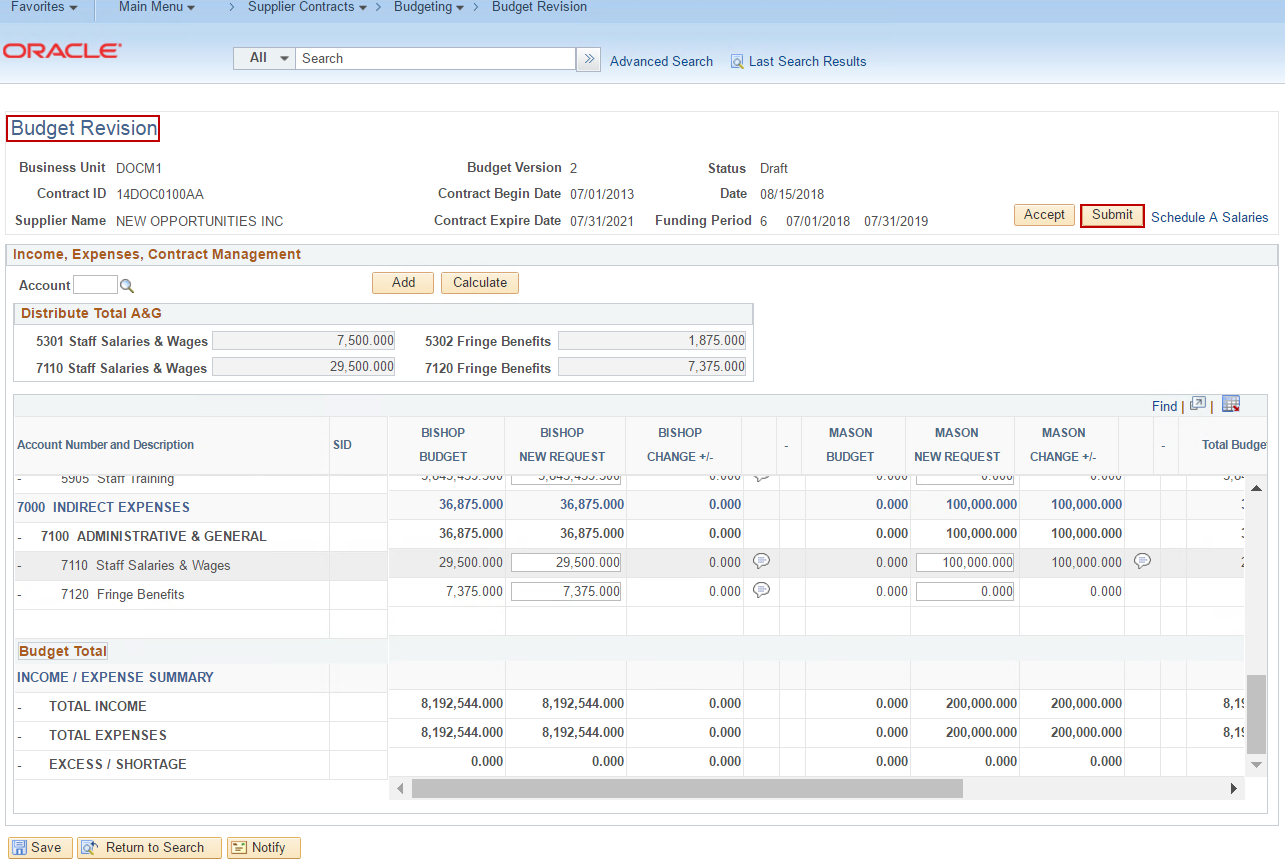


1. **Budget Revision** page is displayed.
2. Click **Calculat**e button.
3. Click **Justification** icon and enter **Justification** for edited/added fields.
4. Click **Save**.

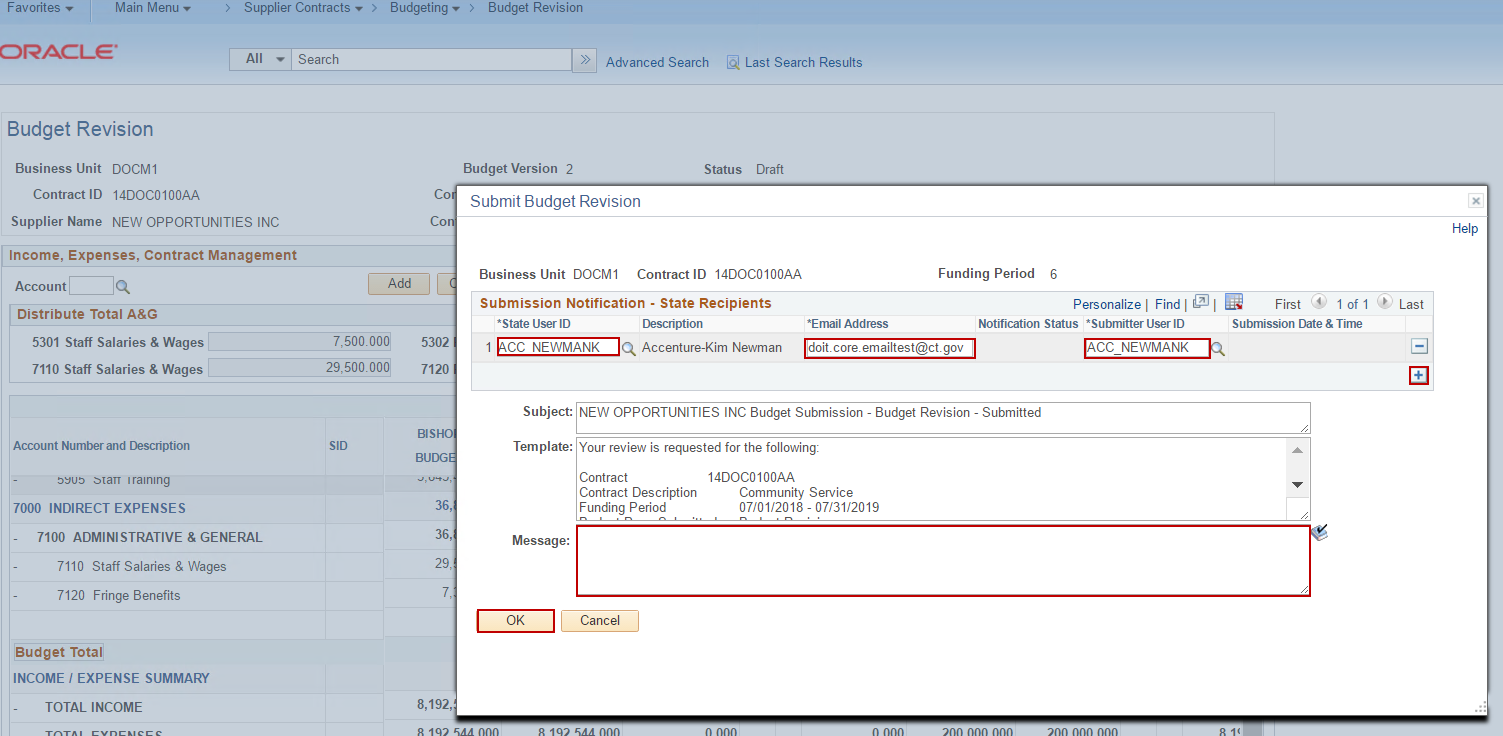


**Step 5**: Submit Budget Revision.

1. Click **Submit** button.

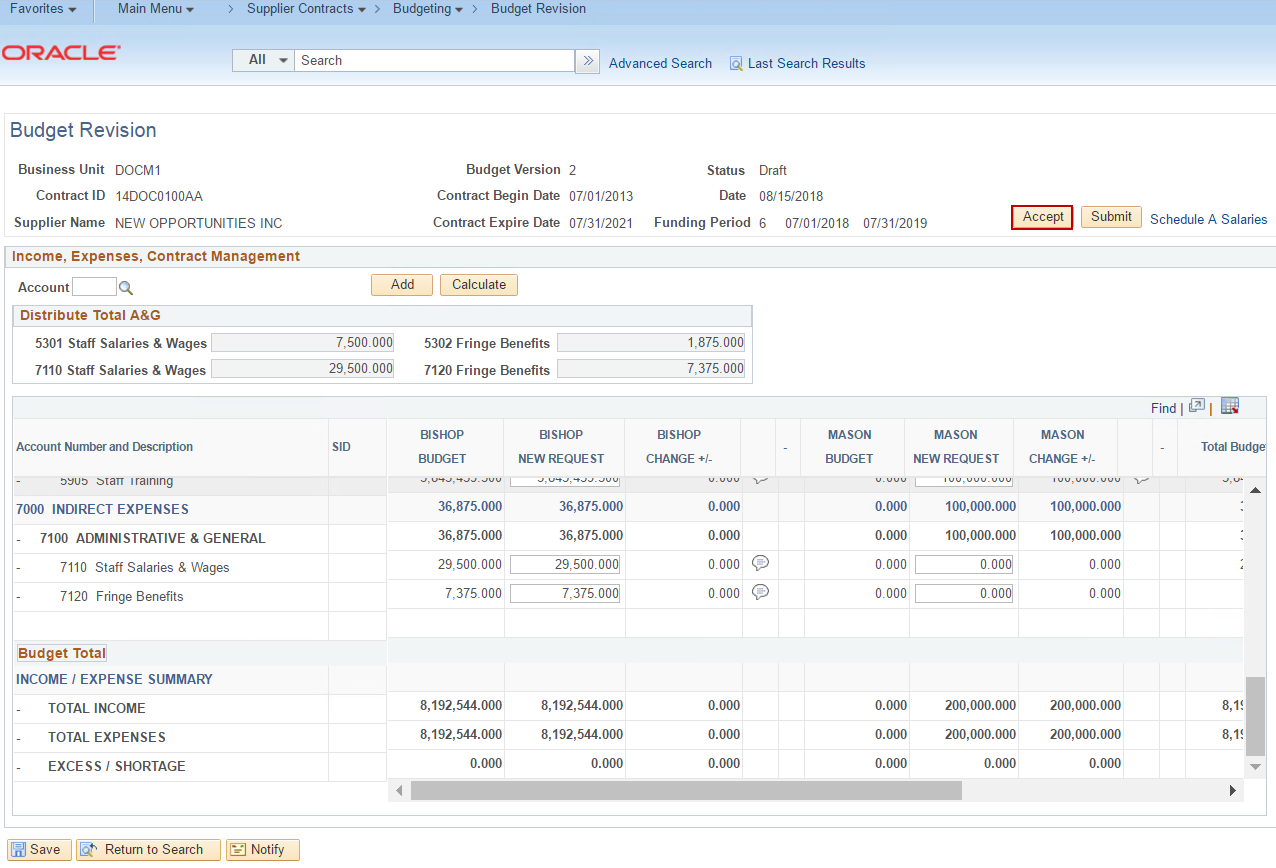


1. **Submit Budget Revision** page is displayed.
2. Enter/update **fields** as required.
3. Click **OK**.

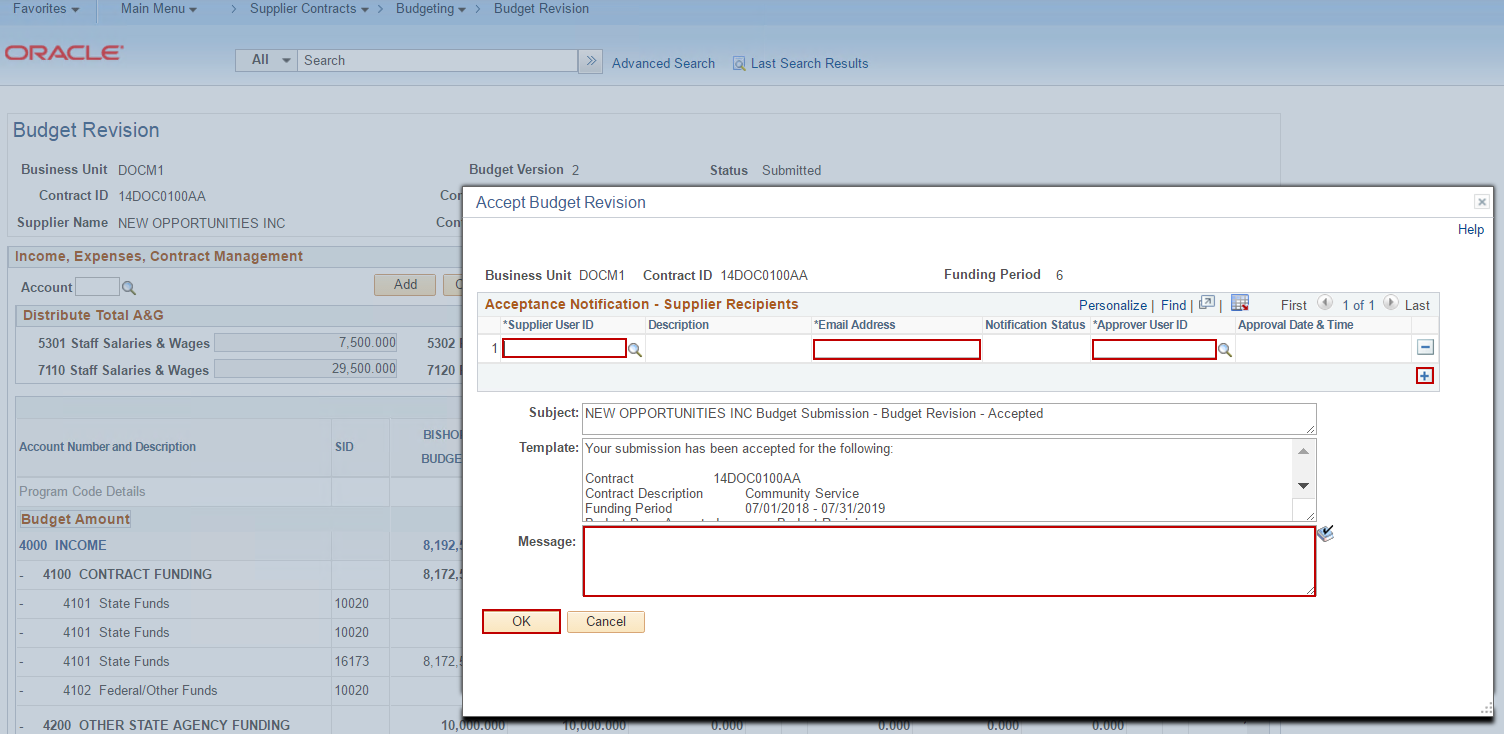


**Step 6**: Accept Budget Revision.

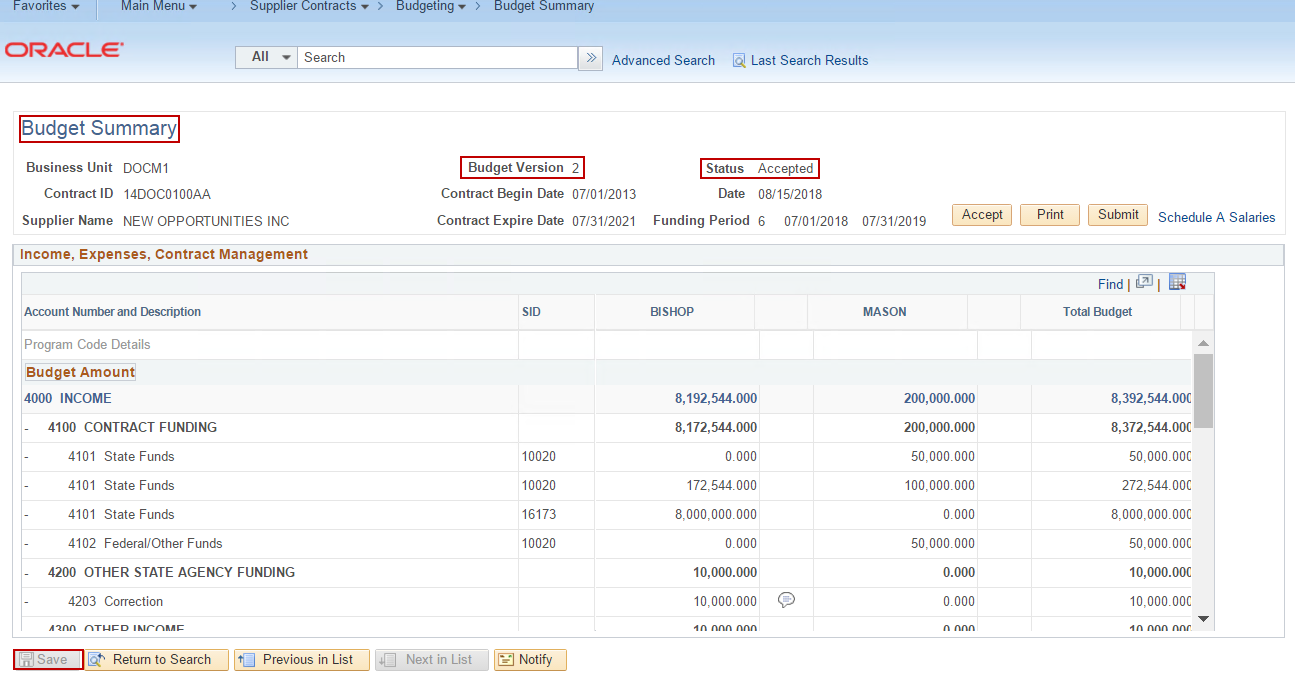
1. Click **Accept** button.



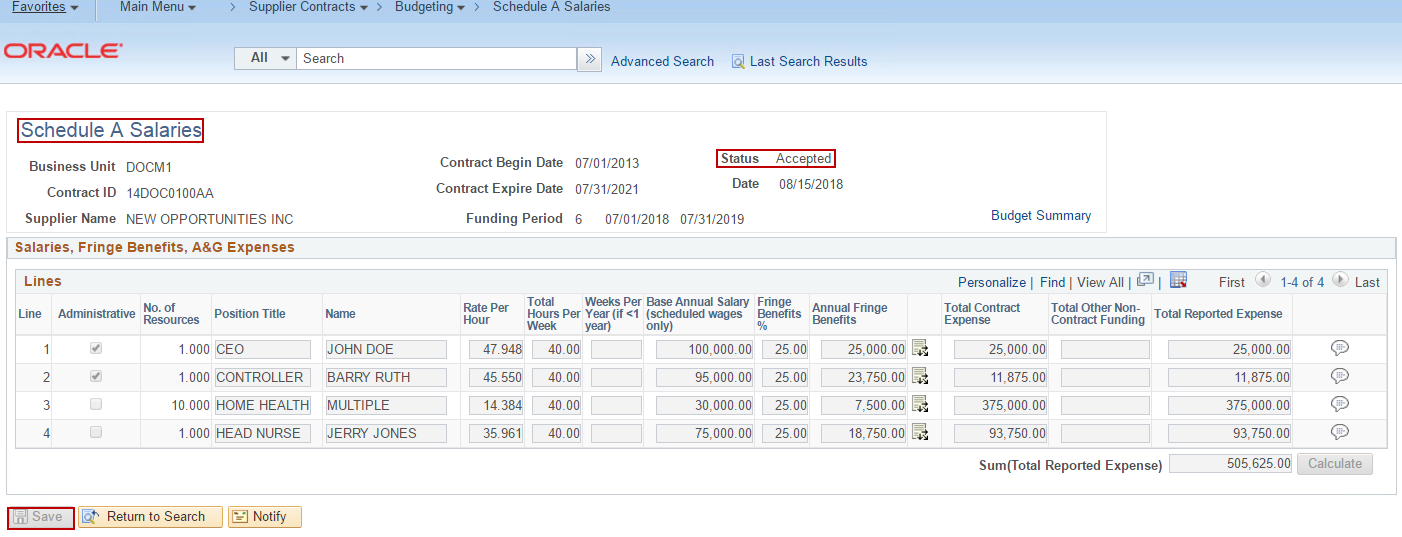
1. **Accept** **Budget Revision** page is displayed.
2. Enter/update **fields** as required.
3. Click **OK**.



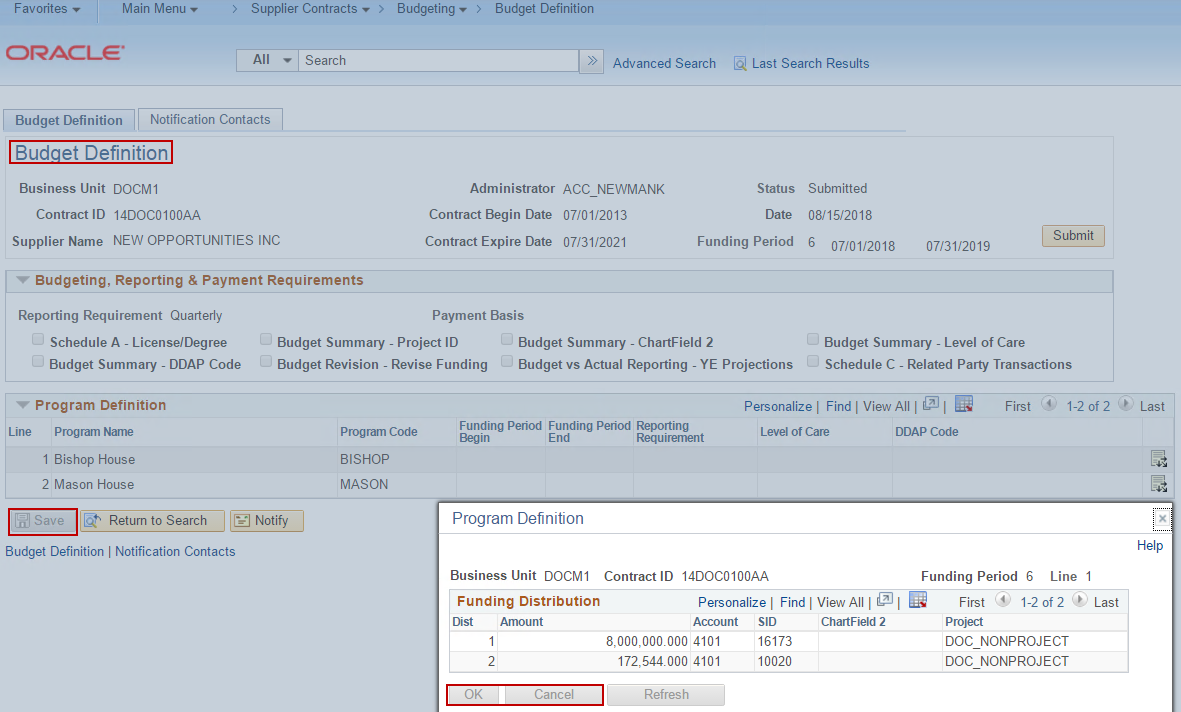
1. **New version** of **Budget Summary** is in **Accepted** status and **un-editable**.



1. **Schedule A Salaries** is in **Accepted** status and **un-editable**.



1. Budget Definition is un-editable.

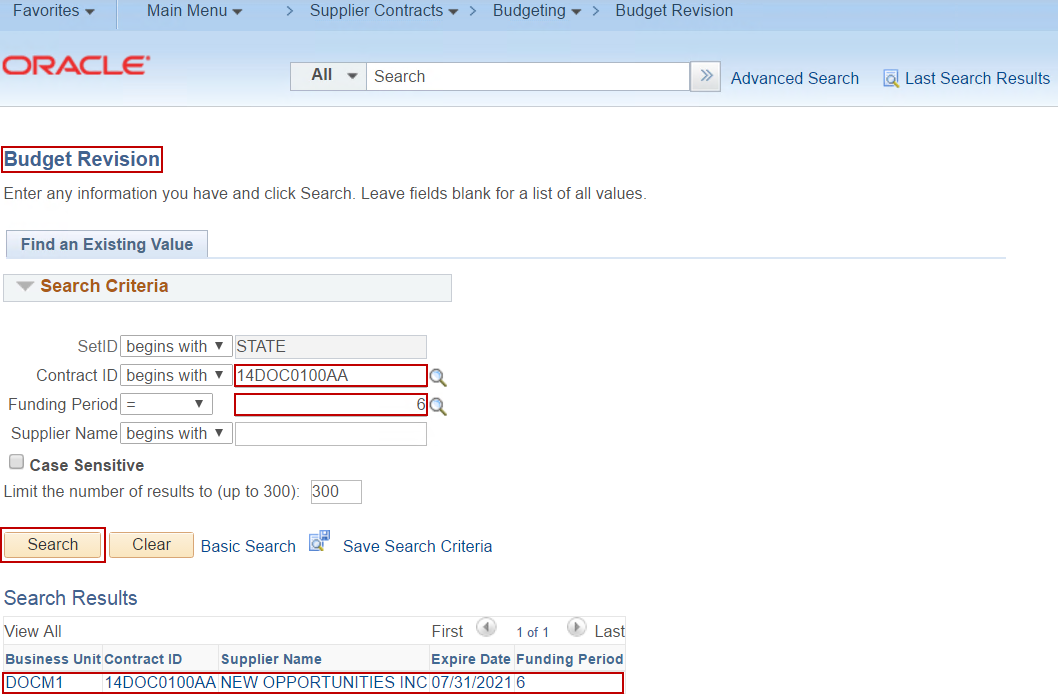


***Scenario 2****: Budget Definition > Budgeting, Reporting & Payment Requirements >* ***Budget Revision – Revise Funding checkbox*** *is* ***CHECKED****.*

**Step 1**: Navigate to **Budget Revision** page.

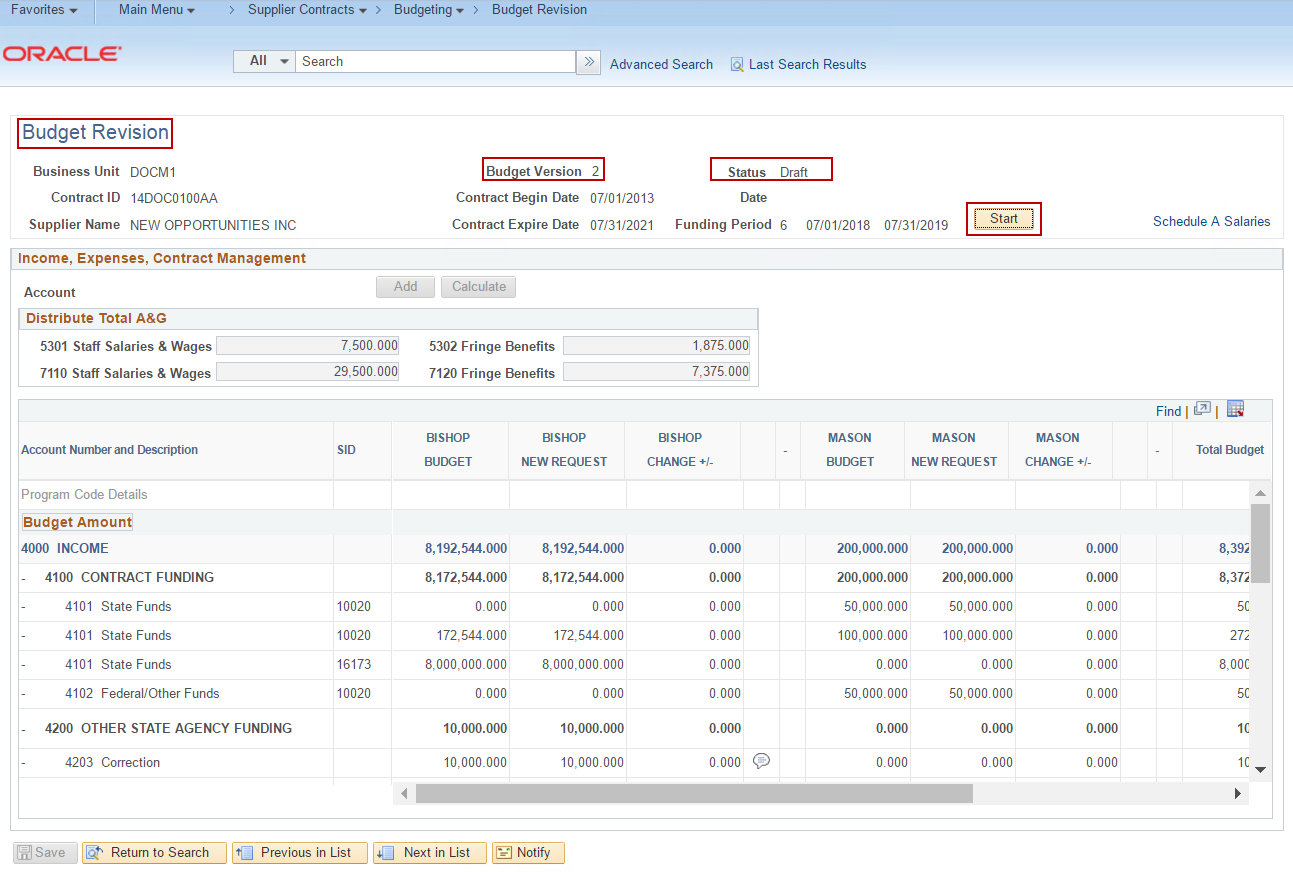
**Navigation:** Supplier Contracts > Budgeting > Budget Revision

1. **Budget Revision Search** page is displayed.
2. Click the **Search** button for all available Contract IDs to appear in the **Search Results**, **or**
3. Enter a **Contract ID**, **or**
4. Enter a **Contract ID** and **Funding Period**.
5. Click the **Search** button.
6. Click on correct **Search Result**.



**Step 2**: Start **Budget Revision**.

1. **Budget Revision** page is displayed.
2. Click the **Start** button.
3. **Start** button initiates the **Budget Revision**, making the **Budget Revision New Request fields**, **Schedule A Salaries**, and **Budget Definition** editable.

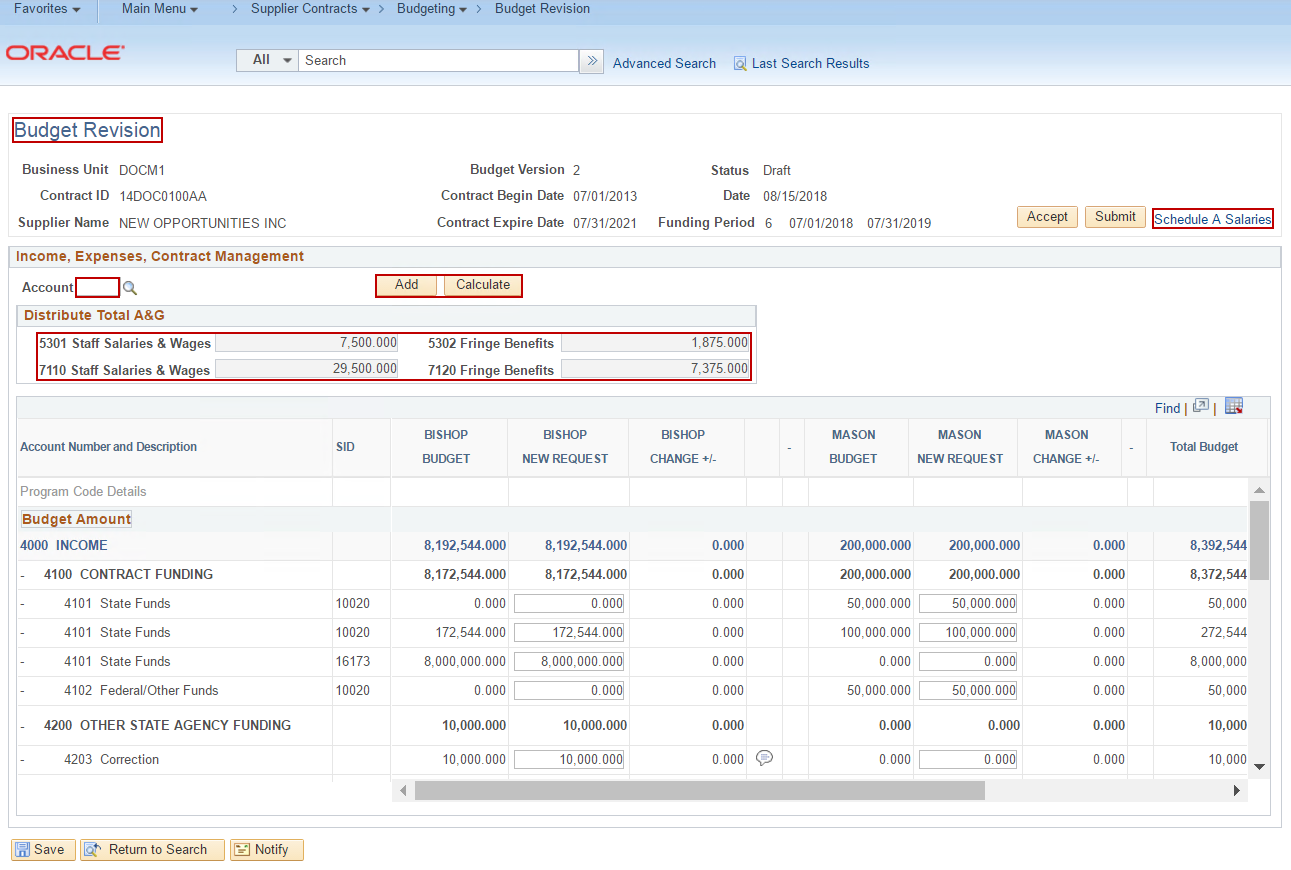


**Step 3**: Re-allocate **existing** and/or add **new** **4100 CONTRACT FUNDING**, **4200 OTHER STATE AGENCY FUNDING**, **4300 OTHER INCOME**, **5000 DIRECT EXPENSES**, and **7000 INDIRECT EXPENSES** accounts/values.

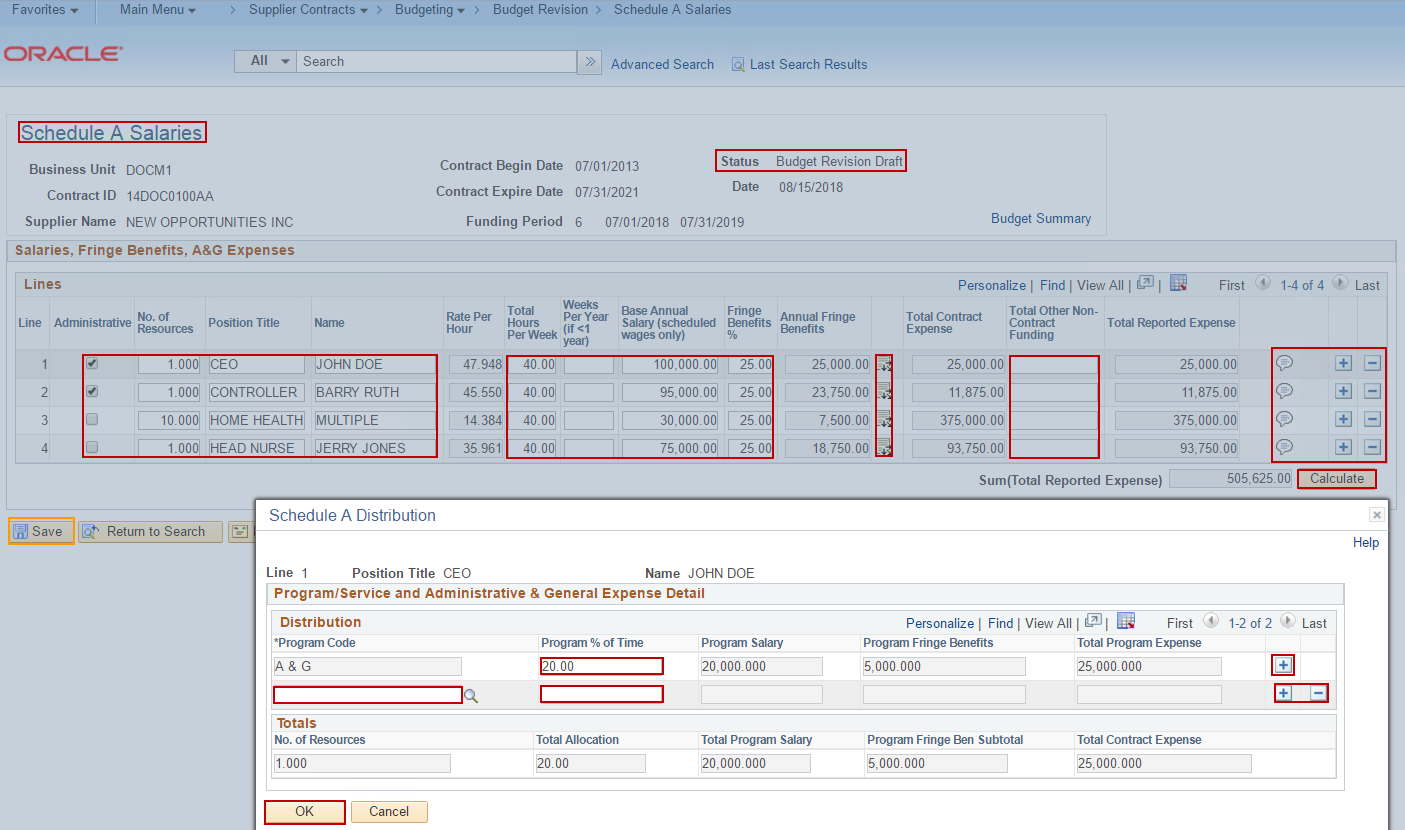
*\*\*Adjustments to 5100 SALARIES, 5200 FRINGE BENEFITS, 5300 A&G (DIRECT), and 7100 A&G (INDIRECT) accounts and values must be completed in Schedule A Salaries. Specifically for A&G updates, the values must be updated in Schedule A Salaries and then manually re-distributed between Program(s) in the NEW REQUEST column(s) in Budget Revision.*

*\*\*\*If new Programs or updates to ChartFields need to be made on a Budget Revision, then the updates must be completed in the Budget Definition.*

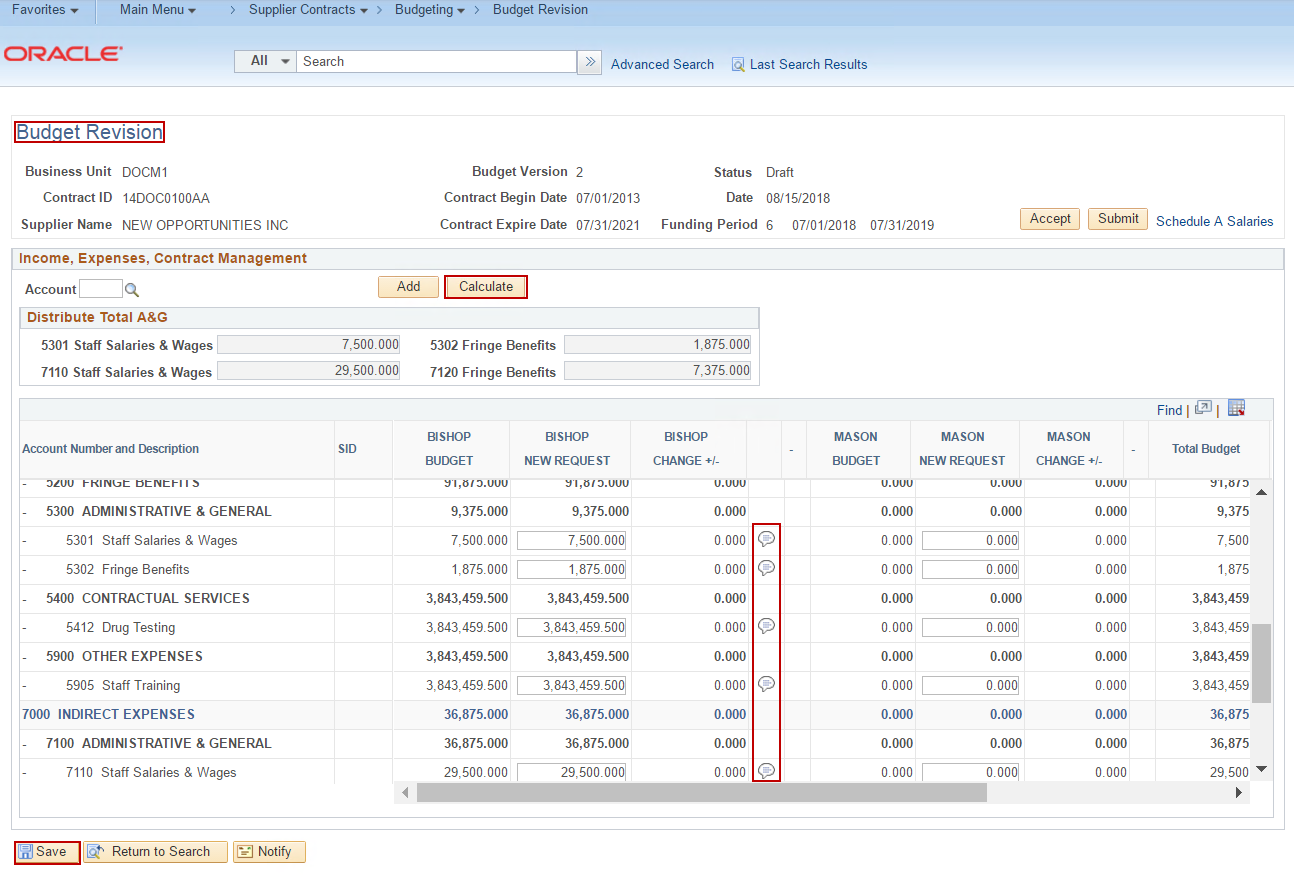
1. Re-allocate existing account values in the **NEW REQUEST** column(s).
2. Click **Justification** icon and enter **Justification** for each edited field.
3. Click **Calculate** button to update **TOTALS**.
4. Add new Accounts and values using the **Account lookup** field and **Add** button.
5. Click **Justification** icon and enter **Justification** for each added field.
6. Click **Calculate** button to update **TOTALS**.
7. Click **Save**.
8. If **Schedule A Salaries** updates are required, navigate to **Schedule A Salaries** via the link on Budget Revision or directly through the menu.



1. **Schedule A Salaries** page is displayed.
2. Update/add/delete **Line(s)** and fields.
3. Click **Save**.
4. Click **Distribution icon** to update/add/delete **Distribution Line(s)**.
5. Click **OK**.
6. Click **Justification** icon to update comments for edited/added **Lines**.
7. Click **Save**.
8. Navigate back to **Budget Revision** by clicking on the open **Budget Revision** tab.



1. **Budget Revision** page is displayed.
2. Click **Calculat**e button.
3. Click **Justification** icon and enter **Justification** for edited/added fields.
4. Click **Save**.

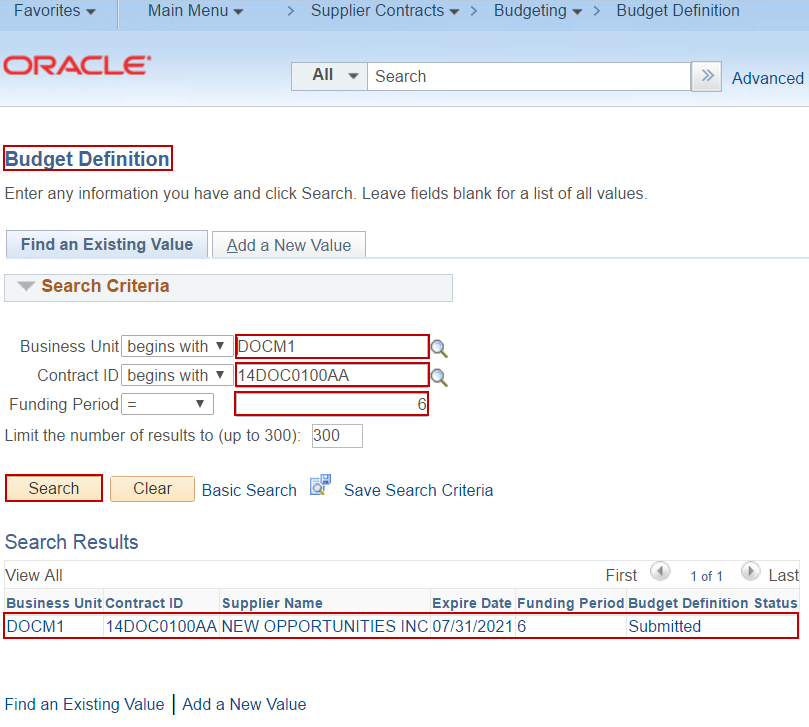


**Step 4**: Add **New Program Lines**, **new Distribution Lines**, and/or update **ChartFields** by navigating to the **Submitted Budget Definition** page.

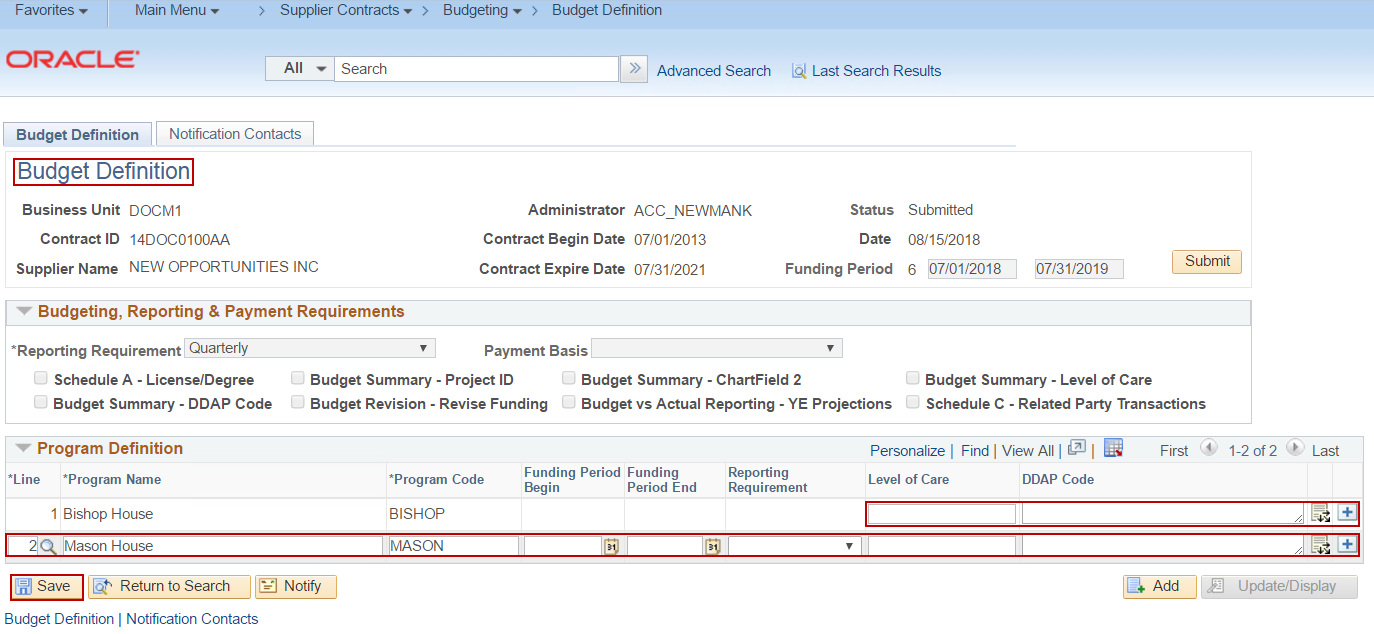
*\*\*All existing 4100 CONTRACT FUNDING account value re-allocations must be completed on the Budget Revision page. Only new Program Lines, new Distribution Lines, and updates to existing ChartFields should be made in the Budget Definition page since the Budget Revision – Revise Funding checkbox is checked on the Submitted Budget Definition.*

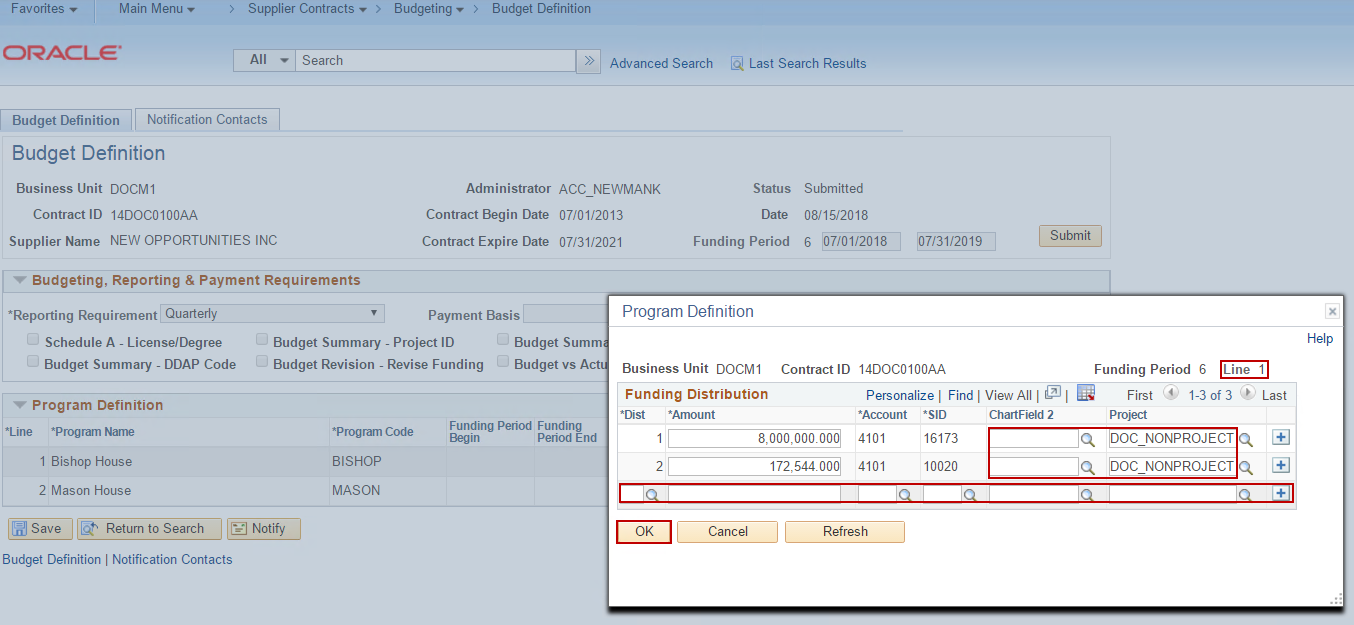
**Navigation:** Supplier Contracts > Budgeting > Budget Definition

1. **Budget Definition Search** page is displayed.
2. Click the **Search** button for all available Contract IDs to appear in the **Search Results**, **or**
3. Enter a **Business Unit**, **and/or**
4. Enter a **Contract ID**, **or**
5. Enter a **Contract ID** and **Funding Period**.
6. Click the **Search** button.
7. Click on correct **Search Result**.

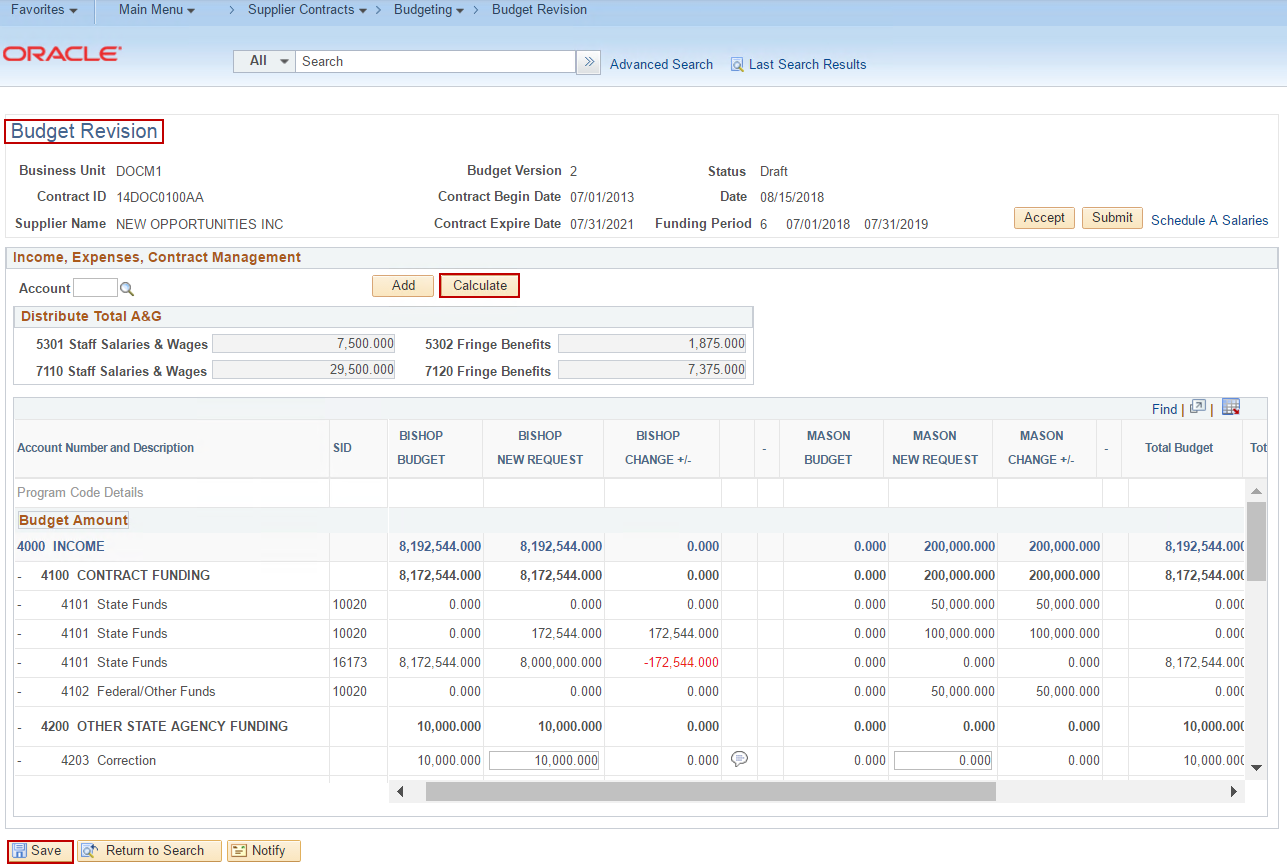


1. **Budget Definition** page is displayed.
2. Add new **Program** **Line(s)** and/or update **LOC/DDAP Code** for existing Lines.
3. Click **Save**.
4. Click **Distribution icon** to update existing **Distribution Line ChartField2** or **Project ID** fields and/or add new **Distribution Line(s)**.
5. Click **OK**.
6. Click **Save**.
7. Navigate back to **Budget Revision** through the Menu navigation.



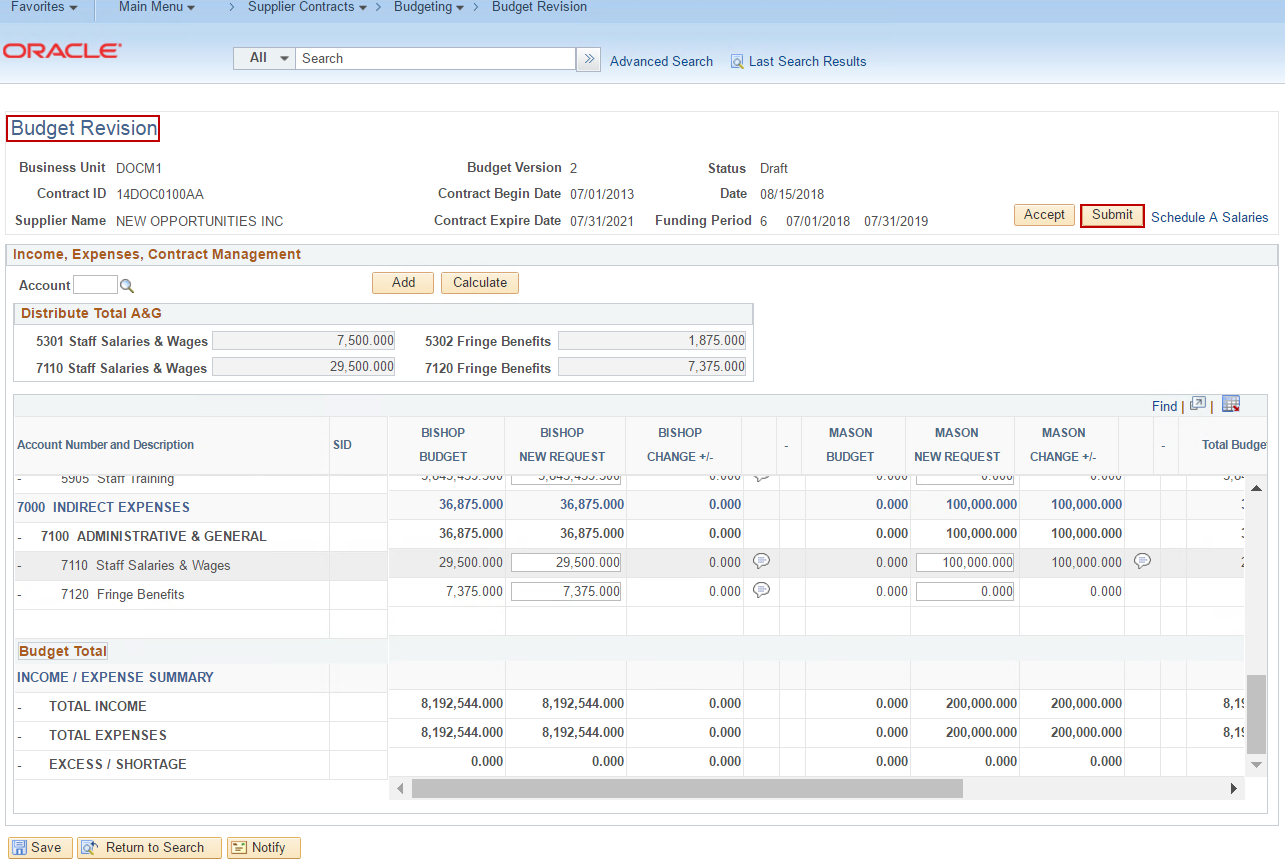


1. **Budget Revision** page is displayed.
2. Click **Calculat**e button.
3. Click **Justification** icon and enter **Justification** for edited/added fields.
4. Click **Save**.

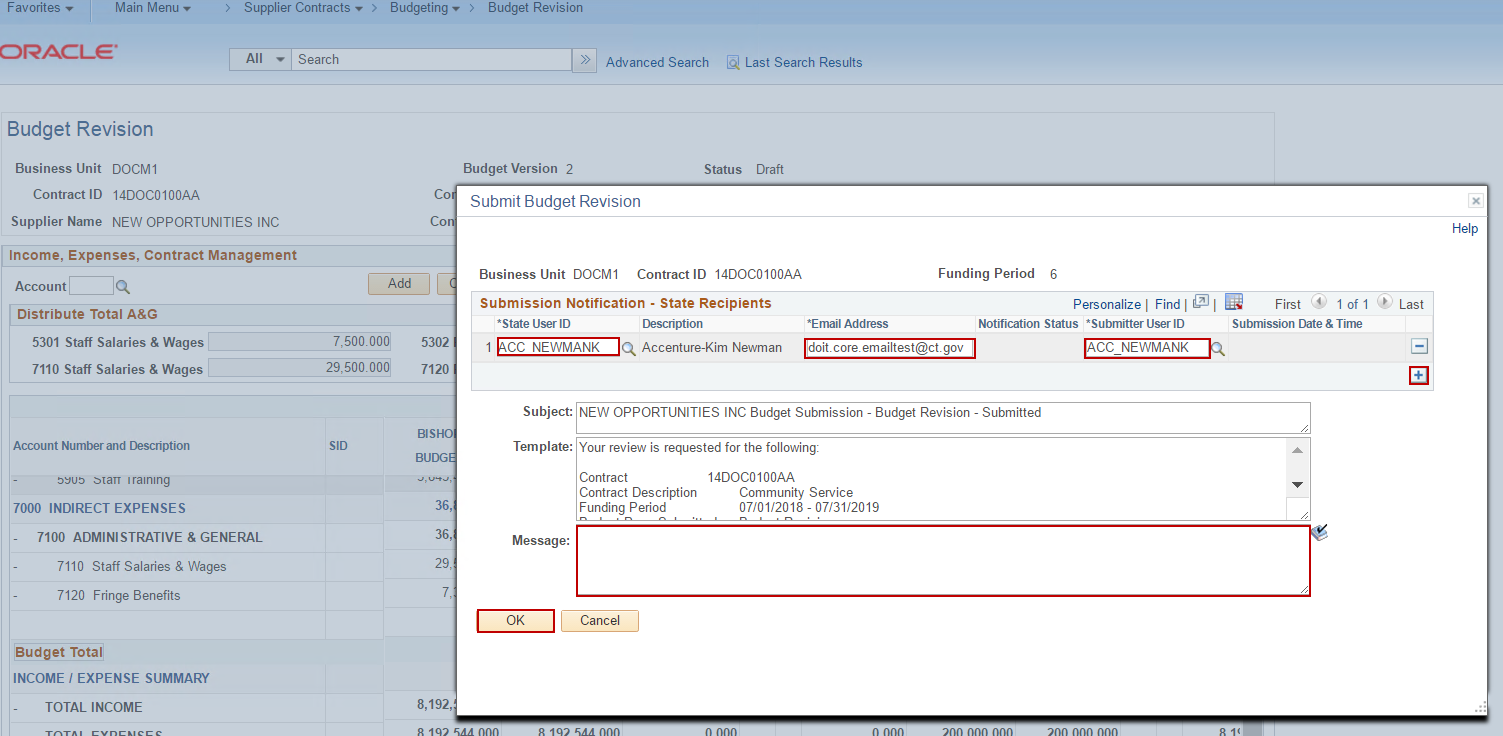


**Step 5**: Submit Budget Revision.

1. Click **Submit** button.

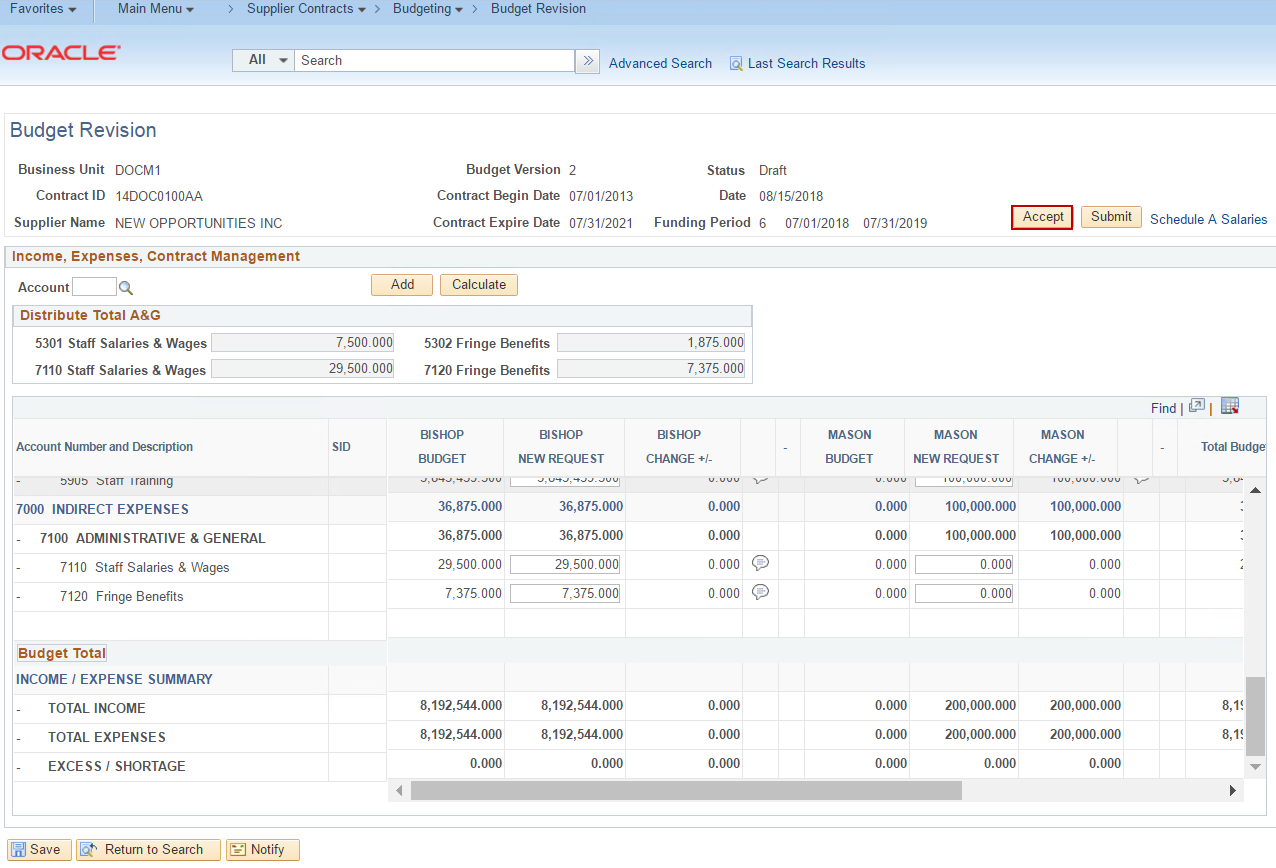


1. **Submit Budget Revision** page is displayed.
2. Enter/update **fields** as required.
3. Click **OK**.

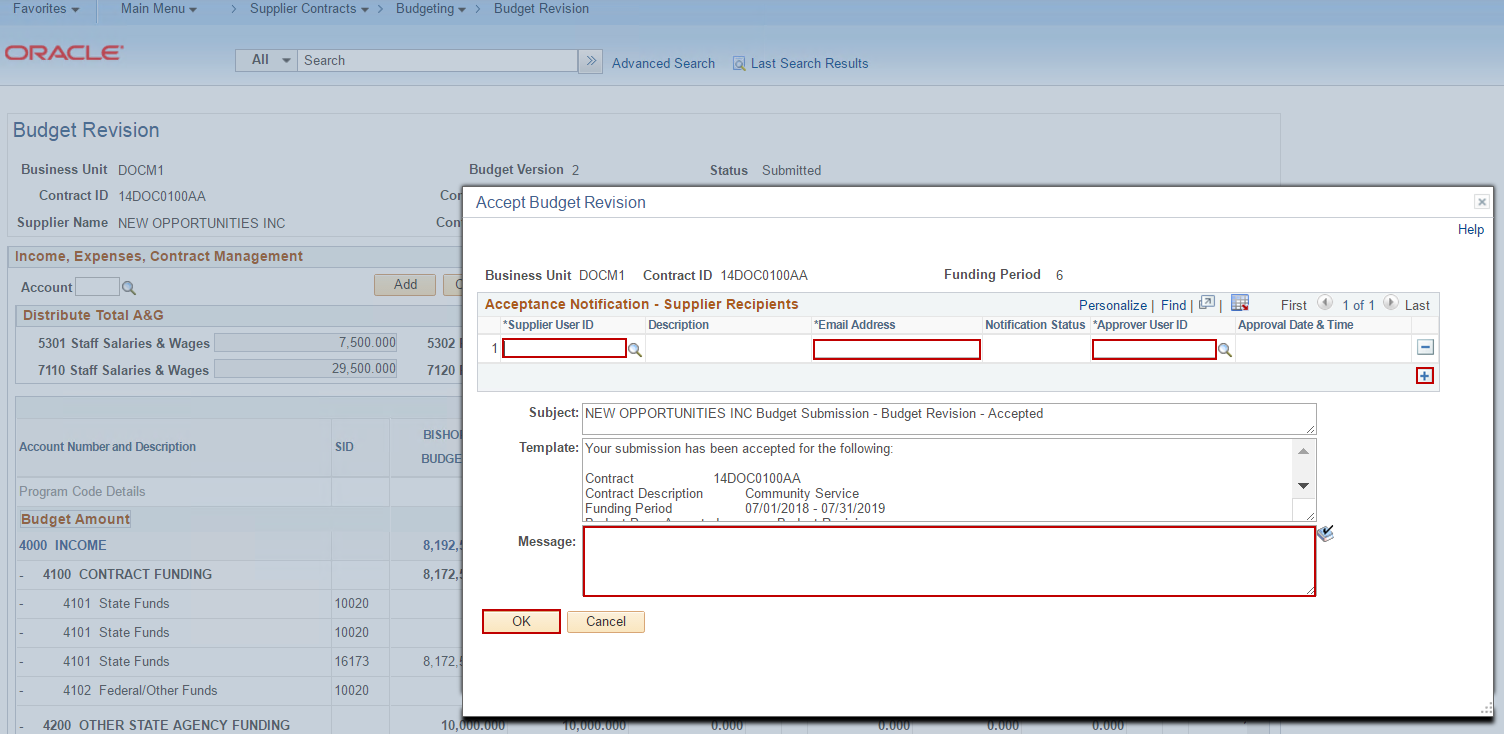


**Step 6**: Accept Budget Revision.

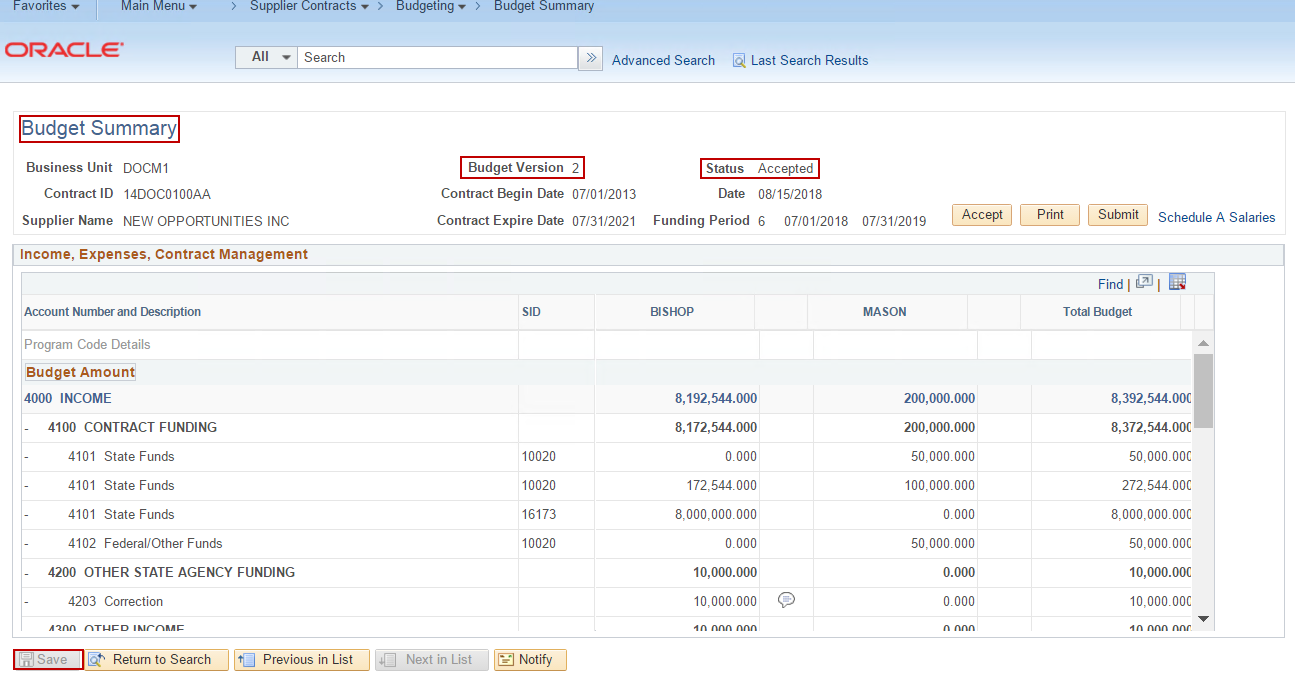
1. Click **Accept** button.



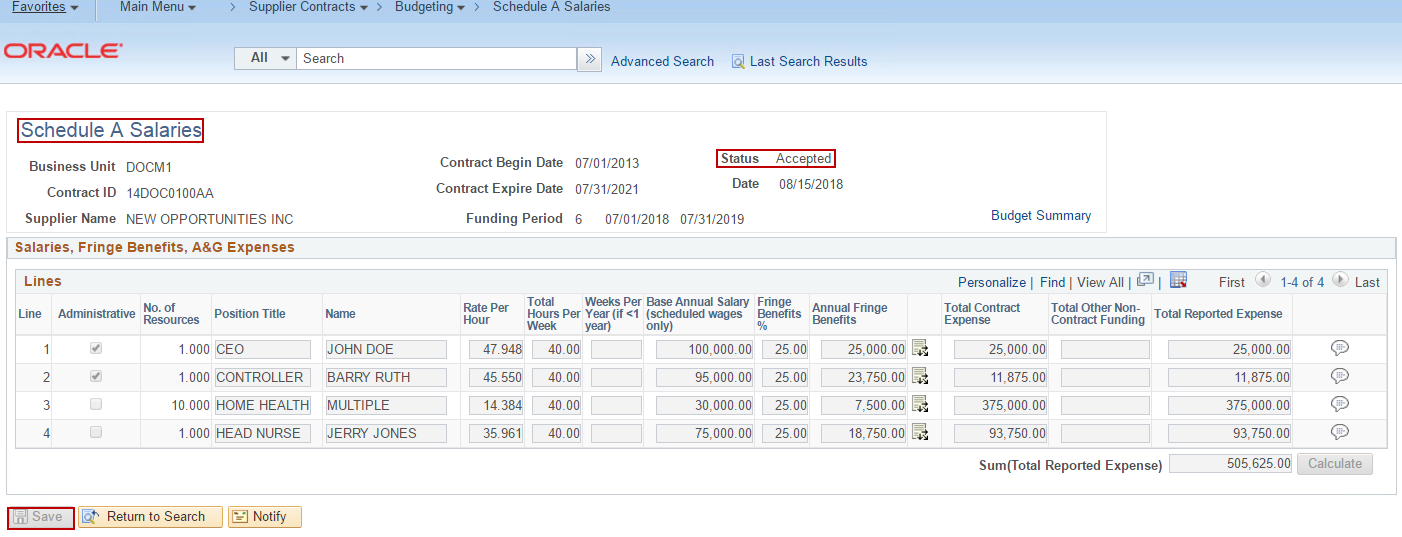
1. **Accept** **Budget Revision** page is displayed.
2. Enter/update **fields** as required.
3. Click **OK**.



1. **New version** of **Budget Summary** is in **Accepted** status and **un-editable**.



1. **Schedule A Salaries** is in **Accepted** status and **un-editable**.



1. Budget Definition is un-editable.

