The page features a decorative graphic consisting of several overlapping circles in various shades of blue. Two thin, light blue lines intersect to form a large 'V' shape that frames the circles. The circles are arranged in a vertical sequence, with the largest one at the top, a smaller one in the middle, and another large one at the bottom right. The text is positioned on the left side of the page.

Hyperion Budget Request Manual

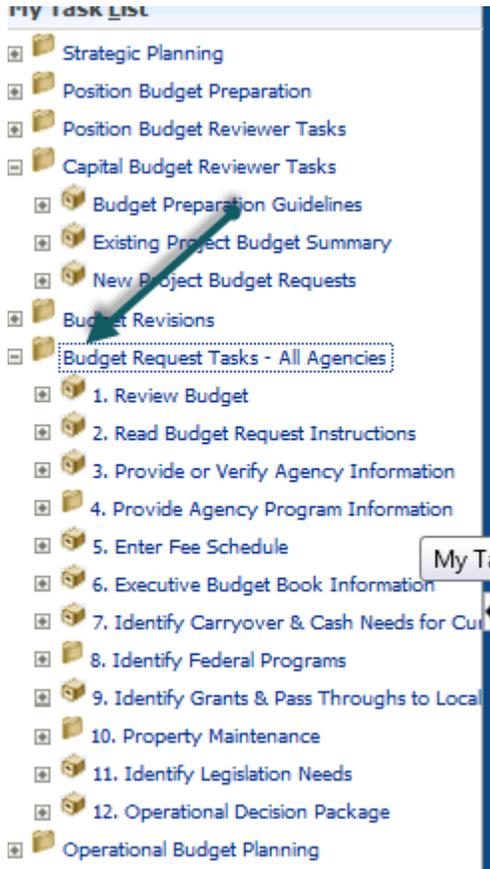
**OMES Budget Division
9/3/2015**

Contents

Task 1: Read Budget Request Instructions	3
Task 2: Provide or Verify Agency Information	4
Task 3: Provide Agency Program Information	5
<i>Provide Agency Program Summary</i>	6
<i>Define Agency Program Performance</i>	8
Task 4: Enter Fee Schedule.....	9
Task 5: Executive Budget Book Information	12
Task 6: Identify Carryover & Cash Needs for Current Year	13
Task 7: Identify Federal Programs	14
<i>Provide Federal Overview</i>	15
<i>Provide Federal Program details</i>	15
Task 8: Identify Grants & Pass Throughs to Local Gov't	16
Task 9: Property Maintenance	17
<i>Agency Property Maintenance Summary</i>	18
<i>Plan Property Maintenance Expenses</i>	18
Task 10: Identify Legislative Needs	19
Task 11: Operational Decision Packages.....	20
Submission Instructions	28
<i>Steps to Submit Decision Packages:</i>	28
<i>Steps to Submitting Budget Request Information (Program info, KPMs, etc.) and Strategic Plan:</i> ...	33

Task 1: Read Budget Request Instructions

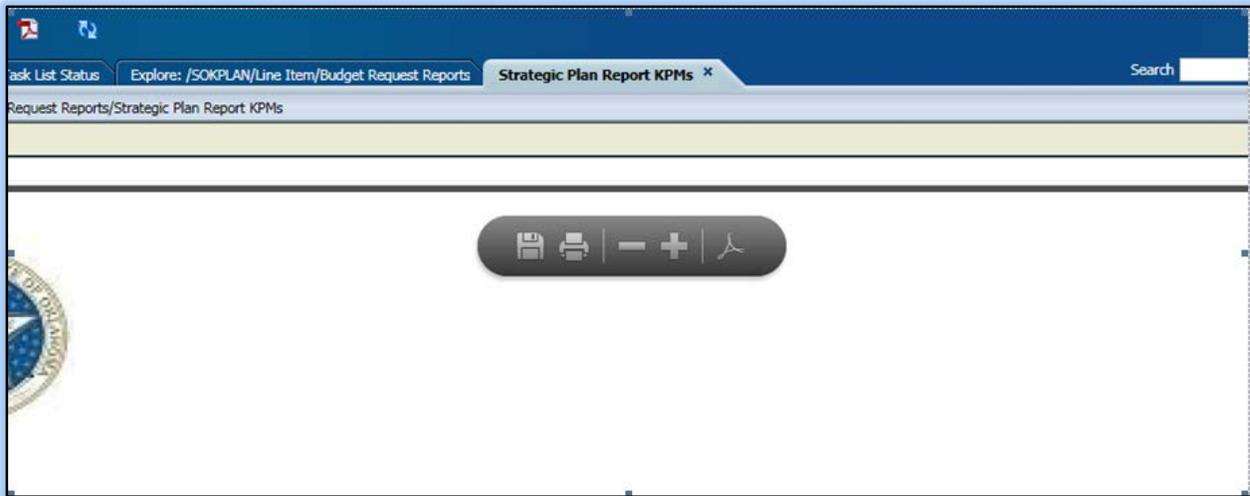
1. Go to **Budget Request Tasks-All Agencies** under My Task List and expand.



2. Click on Read Budget Request Instructions.



Note: To print or save Budget Instructions users will need to hover the mouse cursor over the PDF document so that the following menu appears on the PDF:



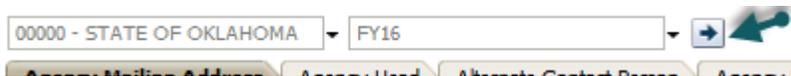
Task 2: Provide or Verify Agency Information

1. Click on **Provide or Verify Agency Information** under Budget Request Tasks-All Agencies.



2. Verify the POV (point of view) settings and select year.

3. Click the Go button.



4. Provide or update agency information for the following tabs:

- Agency Mailing Address
- Agency Head
- Alternate Contact Person
- Agency Management
- Board or Commission members

Agency Details

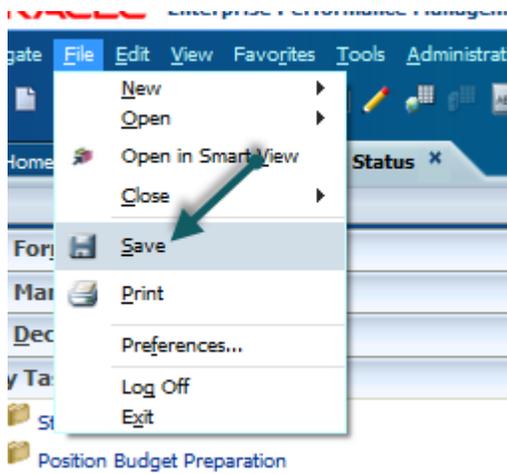
00000 - STATE OF OKLAHOMA

Agency Mailing Address Agency Head Alternate Contact Person Agency Management Board or Commission Members

Budget	
Agency Address Line 1:	
Agency Address Line 2:	
Agency Address City:	
Agency Address State:	
Agency Address Zip Code:	
-	
Agency Status:	▼
Agency Type:	▼
Historical Budget Book	▼

**It is recommended that when the user is finished entering information on each tab to SAVE.

5. Click the File menu then save, or click the Save Icon.

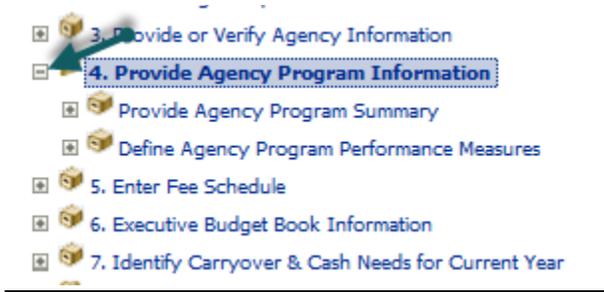


Or



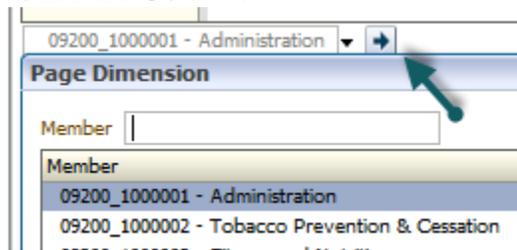
Task 3: Provide Agency Program Information

Expand **Agency Program Information** to access the following tasks, **Provide Agency Program Summary** and **Define Agency Program Information**.



Provide Agency Program Summary

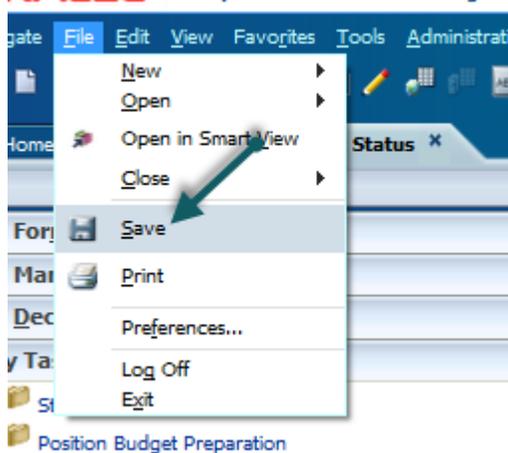
1. To set the POV (point of view), click the dropdown button and select the department to which the program corresponds.
2. Click the **Go** button.



3. Provide answers in the lower **Response** section.

Task List Status	
Task - Provide Agency Program Summary-LineItem_06a_Agency Program Information	
Agency Program Questions	
Input Required:	
Agency Programs	do not type in this box
P1.	Provide the statutory references for this program:
P2.	Please describe the purpose of this program, including a description of what you intend to accomplish:
P3.	What are the direct benefits of this program to society?
P4.	What are the benefits of this program to other agencies?
P5.	Please describe the budget actions taken by agency management or by legislative actions that increased or reduced funding for the current and prior year and discuss the programmatic impact of these budget changes:
Clients	
P6.	Description of Clients:
P7.	Number of potential clients:
04500 - Oklahoma Board of Architects	
Agency Program Responses	
Response:	
Agency Programs	do not type in this box
P1.	O.S. 59, Section 46.1 et seq.
P2.	This program regulates our built environments by licensing and regulating Architects, Landscape Architects and their firms, as well as providing a Title Act registration for Registered Interior Designers & their firms by setting
P3.	This program ensures our built environment, including government, schools, universities and other highly used public buildings are designed to ensure their safety and ability to escape from emergency conditions.
P4.	All government agencies are required to use architects and landscape architects to design their facilities. Interior designers must be registered.
P5.	FY14 Revised budget allowed for furniture cost associated with agency move to new location in PELS bldg. Money was not spent in FY14 as contract is being rebid to be spent in FY15. Capital outlay plan allocated funds for all
Clients	
P6.	Architects, Landscape Architects, Registered Interior Designers and their firms. Our clients are also the exam candidates. The public is the beneficiary.

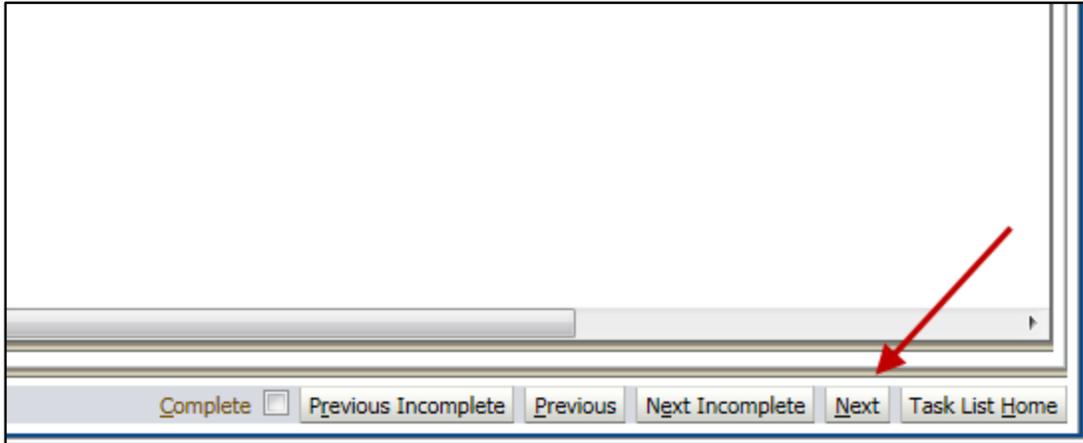
4. Click the File menu then save, or click the Save Icon.



Or



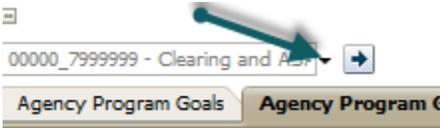
5. Repeat the above steps for other programs.
6. Click **Next** to move to the next task.



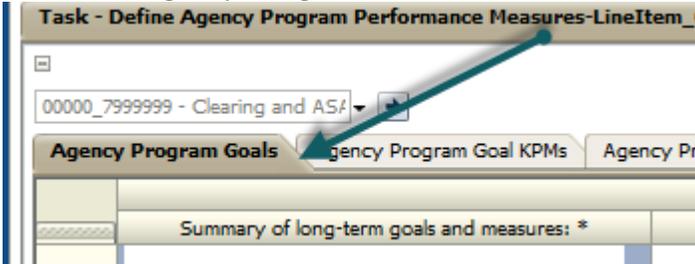
Define Agency Program Performance

In this section, provide agency program goals, KPM's and program evaluation.

1. To set the POV (point of view), click the dropdown button and select the department to which the program corresponds.
2. Click the Go button.



3. Go to the **Agency Program Goals** tab.



4. Fill out the required information.
 - For each goal, provide:
 - Summary of long-term goals and measures
 - Short description
 - Long description

Note: Leave HBB flag column blank.

5. Click the File menu then save, or click the Save Icon.
6. Go to the **Agency Program Goals KPMs** tab.

00000_7999999 - Clearing and AS/

Agency Program Goals		Agency Program Goal KPMs		Agency Program e
FY17		FY14	FY	
Budget		Actual	Bud	
Short Description	Long Description	Measure Values	Measure	

7. Fill out the required information.

- For each goal provide:
 - KPMs for each goal listed on the Agency Program Goals tab.
 - For each KPM provide short and long-term description
 - For each KPM provide measure values
 - For each KPM provide measure values comments (This is mainly what is being measured. Ex. Number of students that receive assistance.)

8. Click the File menu then save, or click the Save Icon.

9. Go to the **Agency Program Evaluation** tab and answer the related questions.

00000_7999999 - Clearing and AS/

Agency Program Goals	Agency Program Goal KPMs	Agency Program evaluation
		FY17
		Budget
Does this program serve readily identifiable users?		▼
Are the users able to pay for the services they receive?		▼
Does the state require citizens to use this service?		▼
If yes, do individual citizens otherwise benefit directly from the service?		▼
Is the service targeted at low-income beneficiaries?		▼
Do other states or municipalities charge for this service?		▼
If yes, please summarize their experience with the charges		
Are there any related services that could be offered on a fee-for-service basis?		▼
If any exist, summarize service and related benefits to users and public		
Discussion of user fees *		

10. Click the **File** menu then save, or click the **Save** Icon.

Task 4: Enter Fee Schedule

Note: This fee schedule works differently because no values feed to line items with this task.

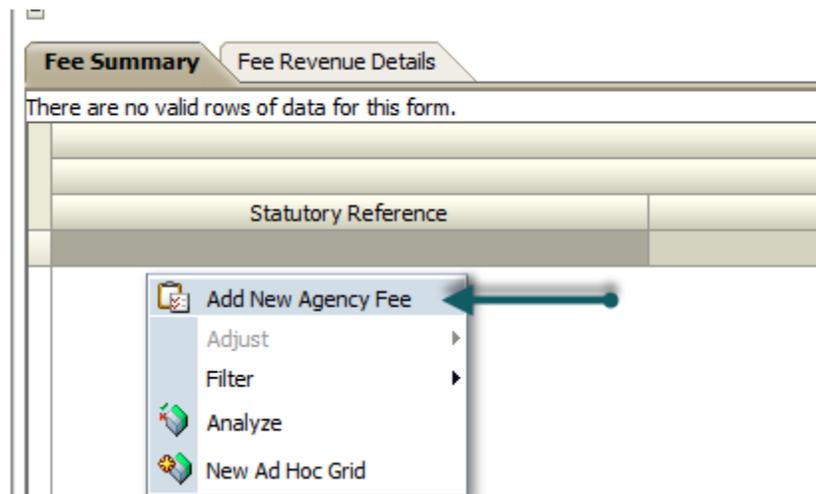
1. Go to **Enter Fee Schedule** under Budget Request Tasks-All Agencies.



2. Go to the **Fee Summary** tab.
3. Set the POV (point of view) to the correct department, class fund, and operating unit.
4. Push the Go button.



5. Right click in the space below and choose “Add New Agency Fee.”



Enter the Fee Name. Note: Fees cannot have the same name as another fee. As such, please use the following naming convention: xxx00_FYXX_Fee_Name (e.g. **09000_FY17_IT_LicenseFee**).

6. Click Launch.

Runtime Prompts - LI_Add New Fee

Prompt Text	Value
* Enter Fee Name	09000_IT_LicenseFee

09000_

Launch Cancel

7. Fill out the required information.

- Statutory Reference
- Fee Description
- Anticipated Fee Increases
- Payer
- Additional Comments.

Fee Summary		Fee Revenue Details		
		FY17		
		BegBalance		
	Statutory Reference	Describe the fee	If you are anticipating or requesting any fee increases. *	Payer
09000_IT_LicenseFee	Title 62, Section 34.36	This is for IT.	No	Oklahoma

8. Click the **File** menu then save, or click the **Save Icon**.

9. Go to the **Fee Revenue Details** tab.

00000_7999999 - Clearing and ASA | No Class Fund | No_OUs

Fee Summary | **Fee Revenue Details**

There are no valid rows of data for this form.

FY15 | FY16

10. Enter data into each FY17 column.

- For columns that request percentages, please use the whole number to represent a percentage (Ex. 10 equals 10%).

	FY17		FY17		FY17		
	⊕ YearTotal		⊕ YearTotal		⊕ YearTotal		
	Rate/Schedule	Number Issued	Fee Revenue	Percent to GRF	Fee Revenue - GRF	Percent to Others	Fee Revenue - Other
	\$25/ 3 pets	25	625.00	10	6.25	90	562.50

11. Click the **File** menu then save, or click the **Save** Icon.

Task 5: Executive Budget Book Information

This is where the information contained in the Governor’s Budget Book will be placed. Please avoid bullets.

1. Go to **Executive Budget Book Information** under Budget Request Tasks-All Agencies.



2. Set the POV (point of view) to the correct year and department. (Note: The department can be any department of your choosing.)

3. Press the Go button.

FY17	83000_2900 - CITIZEN ADVISORY F	←
	BegBalance	
	Budget	
Governing Body:		
Description of Governing Body:		
Agency Mission Statement:		
Agency Duties/Responsibilities:		
Accomplishments over Past Year		
Goals for Upcoming Year		
Major Agency Projects		
Savings, Efficiencies and Shared Services		
Additional Information		
Programs		

4. Answer the questions fully.
5. Click the **File** menu then save, or click the **Save** Icon.

Task 6: Identify Carryover & Cash Needs for Current Year

1. Go to **Go to Identify Carryover & Cash Needs for Current Year** under Budget Request Tasks-All Agencies.



2. In the center of the page, change the POV (point of view) by clicking the dropdown button and selecting a department.
3. Click the Go button.

22000_1000001 - District Attorne	→	←
		Response:

4. Answer all carryover questions in the lower response section

Task List Status

Task - Identify uses of carryover and cash needs in the current year budget-LineItem_09_Carryover/Cash Needs Task Instructions

Input Required:

CCN1.	Describe the agency's budget year needs for cash appropriations:
CCN2.	Comments:
CCN3.	If you used or plan on using carryover for recurring operations in the current budget year, explain the purpose:
CCN4.	If you used or will be used in the current budget year for recurring operations, please indicate the impact of not having these funds again in the budget year:
CCN5.	If you indicated a negative impact list, in priority order, the actions you will take to manage the situation:

02000_8800010 - ISD Data Process

Response:

CCN1.	
CCN2.	
CCN3.	
CCN4.	
CCN5.	



5. Click the **File** menu then save, or click the **Save** Icon.
6. Repeat steps for carryover planning in additional departments by changing POV (points of view).

Task 7: Identify Federal Programs

There are two sub-tasks associated with federal programs. Expand **Identify Federal Programs** to gain access to these tasks.



Provide Federal Overview

1. In the center of the page, change the POV (point of view) by clicking the dropdown button and selecting the department (lowest level, seven digits) and CFDA.
2. Click the **Go** Button.

Task List Status

Task - Provide Federal program overview-LineItem_05a_Federal Programs Task Instructions

Input Required:

FP1. If your agency refers to this program by a different name, please provide the alternate name.

FP2. Describe the program/explain its purpose and how it is accomplished.

FP3. Explain the state matching requirements for this program.

FP4. Describe any limits on the use of funding available from this federal program.

FP5. Indicate how many years this federal funding will be available.

FP6. Explain any substantial change in the funding provided by this program for each of the years indicated in the table.

FP7. If federal funding ends, will this program need to continue? Answer in 'Yes' or 'No'

FP8. Discuss what actions you will take if this federal funding ends. If this program needs to be funded from some other source, describe why this program should continue to be funded and discuss the available sources of

02000_8800010 - ISD Data Process No_CFDA **Go** ←

Response:

FP1.

FP2.

FP3.

FP4.

FP5.

FP6.

FP7.

FP8.

3. Answer all Federal Program questions in the lower response section.
4. Click the **File** menu then save, or click the **Save** Icon.
5. Repeat steps for federal program planning in additional departments by changing the POV (point of view).

Provide Federal Program details

1. In the POV (point of view), click the dropdown buttons and select:
 - Department (Select lowest level department, seven digits)
i.e. 02000_1000001- General Administration
 - CFDA (select nine digit CFDA number)
i.e. 000060000 –Forest Challenge Cost Share
 - Class Fund (lowest level fund, five digits)
i.e. 02000_20000-Accountancy Fund

2. Click the **Go Button**
3. Expand the rows by clicking on the + button.

83000_2900 - CITIZEN ADVISORY F					
No_CFDA		No Class Fund		➔	
	FY12	FY14	FY15	FY16	FY17
	YearTotal	YearTotal	YearTotal	YearTotal	⊕ YearTotal
	Actual	Actual	Budget	Budget	Budget
⊕ Total Expenditure					
-					

4. After the rows have been expanded, enter data in the fields under the FY17 column.

Task - Provide Federal Dollars Details-LineItem_05b_Federal Programs Dollars					
83000_2900 - CITIZEN ADVISORY F		No_CFDA		No Class Fund	
	FY12	FY14	FY15	FY16	FY17
	YearTotal	YearTotal	YearTotal	YearTotal	⊕ YearTotal
	Actual	Actual	Budget	Budget	Budget
⊕ Total Expenditure					
-					
Pass Thrus - State Dollars					
Pass Thrus - Federal Dollars					
⊖ Total Pass Thrus					
-					
Federal Revenues					

5. Click the File menu, then save, Or Click the Save Icon
6. Repeat steps for budgeting federal programs for additional POV (points of view).

Task 8: Identify Grants & Pass Throughs to Local Gov't

1. Go to **Identify Grants & Pass Throughs to Local Gov't** under Budget Request Tasks-All Agencies.



2. In the center of the page, change the POV (point of view) by clicking the dropdown button and selecting :

- Department (Select lowest level department, seven digits)
i.e. 02000_1000001- General Administration
- Class Fund (lowest level fund, five digits)
i.e. 02000_20000-Accountancy Fund

3. Click the Go Button

83000_2900 - CITIZEN ADVISORY F 00000_10000 - Constitutional Res ➔ ⬅

Response:

4. Answer all federal grant questions in the lower response section.

Task List Status

Task - Identify Federal Grants-LineItem_07b_Grants Narrative Task Instructions

☐

Input Required:

G1.	Describe the program/explain its purpose and how it is accomplished.
G2.	Was the agency directed in legislation to provide the funding to a specific entity?
G3.	If so, please explain the issue and provide the applicable legal reference:
G4.	Explain how the program is administered and the rules for receiving the funds:
G5.	Explain how the rules for the program are established:

02000_1000001 - General Administ 02000_20000 - Accountancy Fund ➔

Response:

G1.	
G2.	
G3.	
G4.	
G5.	

(A red arrow points from the 'Response:' header to the G1. row in the response section.)

5. Click the File menu, then save, or click the Save Icon.

6. Repeat steps for federal grant planning in additional departments by changing the POV (point of view).

Task 9: Property Maintenance

There are two sub-tasks associated with property maintenance. Expand **Property Maintenance** to gain access to these tasks.



Agency Property Maintenance Summary

1. In the center of the page, change the POV (point of view) by clicking the dropdown button and selecting a department (lowest level, seven digits).
2. Click the Go button.



3. Answer all property maintenance questions in the lower response section.

A screenshot of a 'Task List Status' window. The window title is 'Task List Status'. Below the title bar, there are two tabs: 'Task - Agency Property Maintenance Summary-LineItem_04a_Property Maintenance' and 'Task Instructions'. The main content area is divided into two sections. The first section is titled 'Input Required:' and contains two rows: 'PM1. Describe the agency's maintenance program for equipment, buildings, vehicles, land and other property' and 'PM2. Additional Comments'. The second section is titled 'Response:' and also contains two rows: 'PM1.' and 'PM2.'. A red arrow points down to the 'Response:' section. At the bottom of the window, there is a dropdown menu showing '02000_1000001 - General Administ' and a 'Go' button.

4. Click the File menu, then save, or click the Save Icon.
5. Repeat steps for property maintenance planning in additional departments by changing the POV (point of view).

Plan Property Maintenance Expenses

1. In the POV (point of view), click the drop down button and select a department (lowest level, seven digits).
2. Click the Go Button.
3. Enter the required information in the FY17 column.

83000_2900 - CITIZEN ADVISORY F			
	FY15	FY16	FY17
	YearTotal	YearTotal	± YearTotal
	Budget	Budget	Budget
Assets - Equipment			
Assets - Buildings			
Assets - Vehicles			
Assets - Land			
Assets - Other Property			
Total ASSETS			
Expense - Office Furniture & Equipment			
Expense - Bldgs, Struct. - Constr. - Renov.			
Expense - Equip -MV -Passenger Cars			
Expense - Purchase of Land			
Expense - Hghwy, Bridge Constr. -Contracts			
Total EXPENSES			

4. Click the File menu, then save, or click the Save Icon.

5. Repeat steps for property maintenance planning in additional departments by changing the POV (points of view).

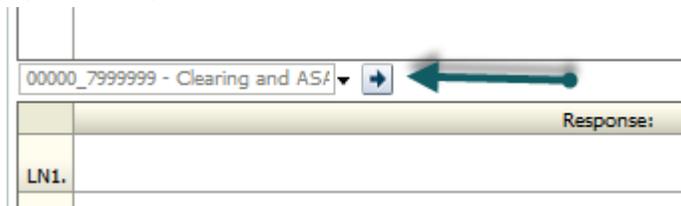
Task 10: Identify Legislative Needs

1. Go to **Identify Legislative Needs** under Budget Request Tasks-All Agencies.



2. In the center of the page, change the POV (point of view) by clicking the dropdown button and selecting the desired department (lowest level, seven digits).

3. Click the Go button.



4. Answer all Legislative Needs questions in the lower response section.

Task - 7. Identify Legislation Needs-LineItem_08_Legislation Needs		Task Instructions
Input Required:		
LN1.	Indicate the Title that is being affected.	
LN2.	Provide a description of the legislative change you are seeking.	
LN3.	Explain why the change is needed including what you intend to accomplish through the change in law.	
02000_8800010 - ISD Data Proc		
Response:		
LN1.		
LN2.		
LN3.		

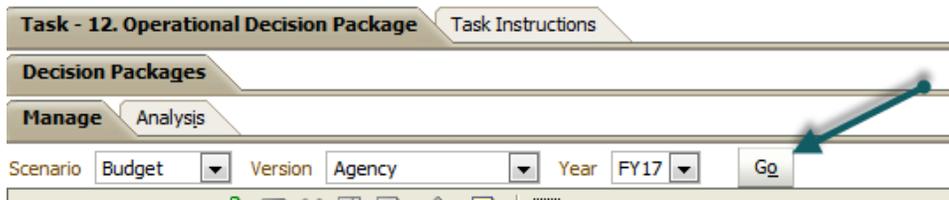
5. Click the File menu then save, or click the Save Icon.
6. Repeat steps for legislative needs planning in additional departments by changing the POV (points of view).

Task 11: Operational Decision Packages

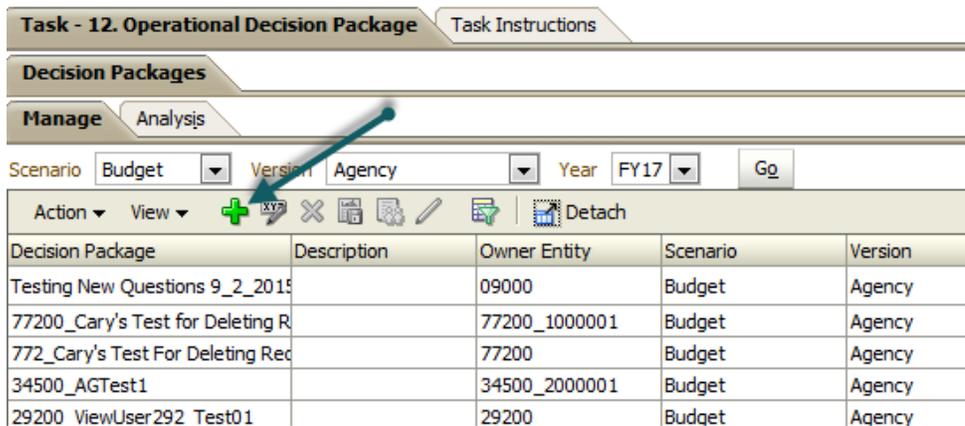
1. Go to **Operational Decision Package** under Budget Request Tasks-All Agencies.



2. In the top half of the screen under Decision Packages, set the POV (point of view) as follows:
 - Scenario: Budget
 - Version: Agency (This can appear as Agency Request if certain display options were chosen under Preferences.)
 - Year: FY17
3. Click the Go button.



4. Click the green plus sign to create a new decision package.



5. Fill out the required information.

- Name: Name of the decision package. Please follow the naming convention. It should be Agency Business Unit_Request Fiscal Year_DP#_Name (Ex. 09000_FY17_DP1_New Roof).
- Description: Provide a short description of the funding changes.
- Rank: Rank the decision package versus the agency's other requests.
- Budget Impact: Leave as Include.
- Scenario: Budget
- Version: Agency
- Owner Entity: The department which is affected by this funding change. If it is more than one department, enter the agency business unit. (You can use the member selector button on the right to find the department or business unit; however, the five digit business unit can also be typed into the box.)
- Decision Package Reviewers: Please leave this blank. If you insert anything into this box, it can cause problems once the decision package is ready for submission.

6. Click Finish.

Create/Edit Decision Package

Properties | Attributes | Justification | Summary

* Name: 09000_FY17_DP1_New Roof

Description: New Roof Needed

Rank: 1

Budget Impact: Include

* Scenario: Budget

* Version: Agency

* Owner Entity: 09000

Decision Package Reviewers:

Previous Next Cancel Finish

7. Click on the created decision package.
8. Go to the bottom half of the screen and click on the green plus sign to add a budget request.

Total							\$0.00
Budget Requests							
Approval Status Justification Notes and Attachments							
Action	View	+	✕	✎	📄	Detach	
Budget Request	Description	Owner Entity	Budget Type	Budget Impact	Rank	Amount	
34500_AGBR1		34500_2000001	Non Recurring	Include	1	\$0.00	

9. Fill out the required information.
 - Name: Name the budget request. Note: This cannot be the same name as the decision package.
 - Description: Describe the funding change requested.
 - Rank: Rank the budget request.
 - Budget Impact: Leave as Include.
 - Owner Entity: This will match the decision package.
 - Budget Type: Choose either recurring or nonrecurring.

10. Click on the Justification tab.

The screenshot shows the 'Create/Edit Budget Request' window with the 'Properties' tab selected. The fields are as follows:

- * Name: 09000_FY17_BR 1_New Roof
- Description: For new roof
- Rank: 1
- Budget Impact: Include
- * Owner Entity: 34500_2000001
- Budget Type: Recurring

A blue arrow points to the 'Justification' tab in the top navigation bar.

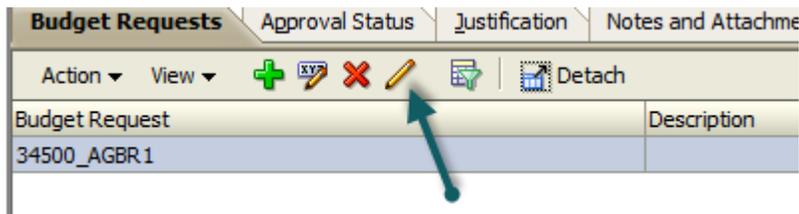
11. Answer each justification question. Note: It will not allow the budget request to be created until each question is answered.

12. Click Finish.

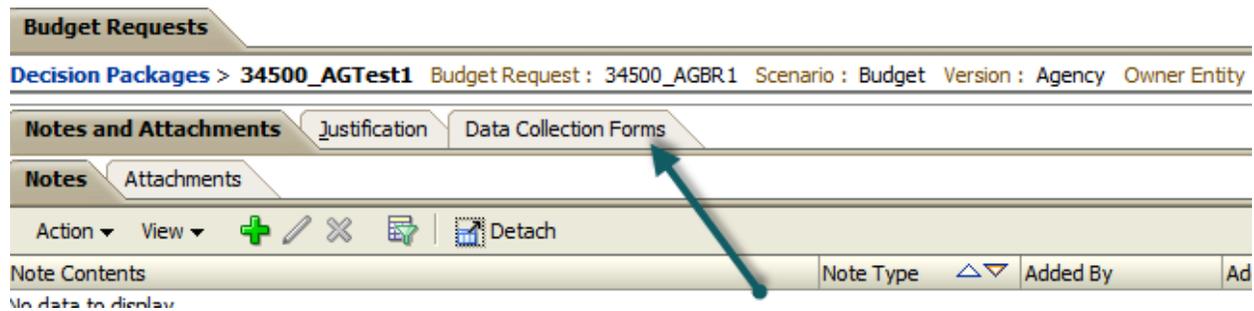
The screenshot shows the 'Create/Edit Budget Request' window with the 'Summary' tab selected. The 'Justification' tab is also visible. The 'Summary' section displays 'Question: 1 of 20' and the prompt 'Describe the funding change:'. Below the prompt is a rich text editor with a toolbar containing various formatting options like bold, italic, underline, and font color. A blue arrow points to the 'Finish' button in the bottom right corner of the window.

13. Highlight the created budget request.

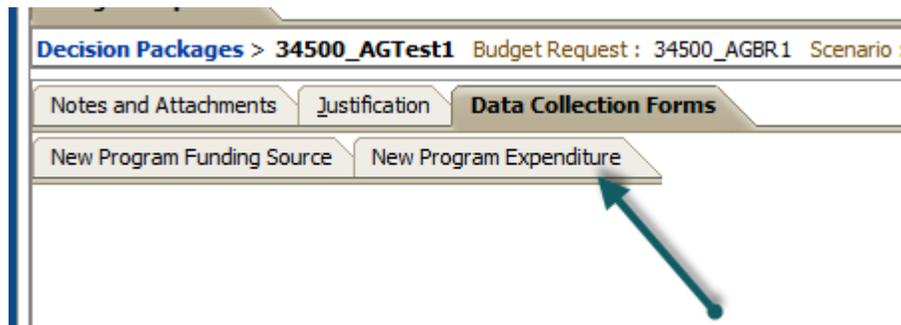
14. Click on the highlighted pencil to edit the budget request.



15. Start with the Data Collection Forms Tab.



16. Click on the New Program Expenditure Tab.



17. Set the POV (point of view) to the correct members including:

- Department (Select lowest level department, seven digits)
i.e. 02000_1000001- General Administration
- Operating Unit
i.e. 00000_NoOPR_NoPRDs
- Project
i.e. 09000_1111111111
- CFDA (select nine digit CFDA number)
i.e. 000060000 –Forest Challenge Cost Share
- Class Fund (lowest level fund, five digits)
i.e. 02000_20000-Accountancy Fund
- Program (lowest level, includes the work INPUT)
i.e. Maternal & Infant Health (INPUT)

18. Push the Go button.

New Program Funding Source **New Program Expenditure**

83000_2900 - CITIZEN ADVISORY F No_OUs No_Project No Class Fund No_CFDA

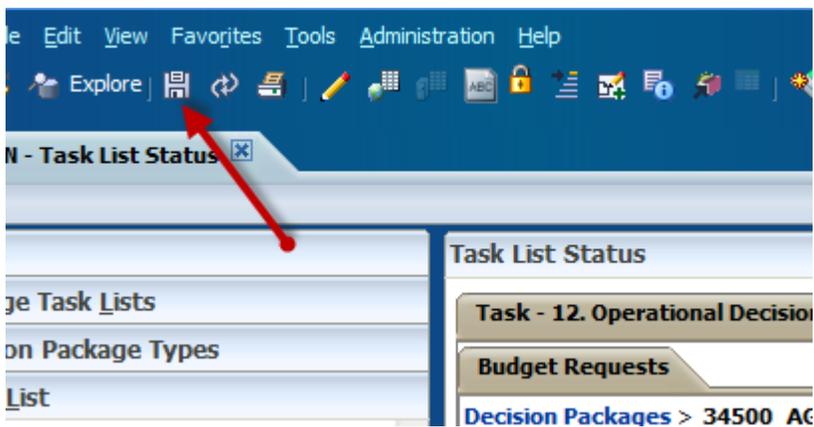
NP000 

Budget
FY17
<input type="checkbox"/> YearTotal

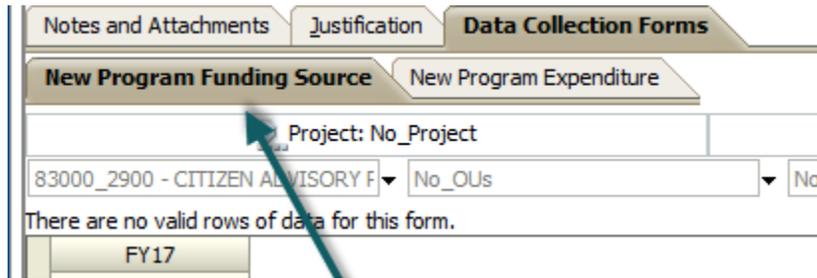
19. Expand Expenditures to the desired six digit account code and enter the data.

	Budget
	FY17
	<input type="checkbox"/> YearTotal
<input type="checkbox"/> 511 - Salary Expense	
<input type="checkbox"/> 512 - Insur.Prem-Hlth-Life,etc	
<input type="checkbox"/> 513 - FICA-Retirement Contributions	
<input type="checkbox"/> 514 - Benefit Payments	
<input type="checkbox"/> 515 - Professional Services	
<input type="checkbox"/> 516010 - Net Pay (Osf Payroll Use Only) 	
<input type="checkbox"/> 516 - Net Pay	
<input type="checkbox"/> 517 - Reportable Compensation	
<input type="checkbox"/> 519 - Inter/Intra Agency Pmt-Prof Se	
<input type="checkbox"/> 51 - PERSONAL SERVICES	
<input type="checkbox"/> 52 - TRAVEL	
<input type="checkbox"/> 53 - ADMINISTRATIVE EXPENSE	
<input type="checkbox"/> 54 - PROP,FURN,EQUIP & RELATED DEBT	
<input type="checkbox"/> 55 - GEN ASST, AWDS, PROG-DIRECTED	
<input type="checkbox"/> 56 - TRANSFERS & OTHER DISBURSMNTS	
<input type="checkbox"/> 59 - Reappropriation-Redesignation	
<input type="checkbox"/> 5 - EXPENDITURES	

20. Click on File then Save, or click on the Save Icon.



21. Change the POV and repeat the steps if needed to complete the entry of the budget request.
22. Click on the New Program Funding Source tab. This is where the revenue will be entered.



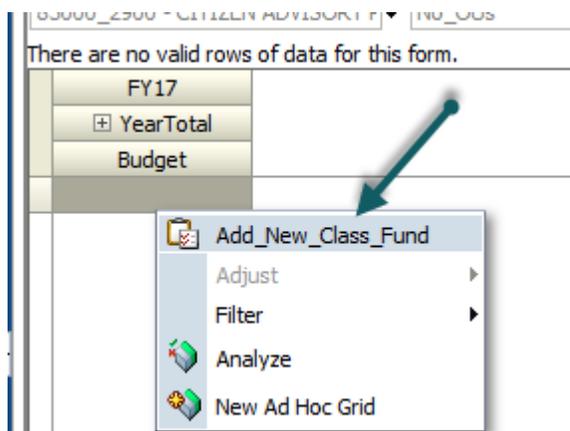
23. Set the POV (point of view) for the department, operating unit, CFDA, revenue account code, and statewide program.

- Department (Select lowest level department, seven digits)
i.e. 02000_1000001- General Administration
- Operating Unit
i.e. 00000_NoOPR_NoPRDs
- CFDA (select nine digit CFDA number)
i.e. 000060000 –Forest Challenge Cost Share
- Revenue Account code (lowest level fund, six digits)
i.e. 411101-Alcohol Bev Excise Tax
- Program (lowest level, includes the work INPUT)
i.e. Maternal & Infant Health (INPUT)

24. Click Go.

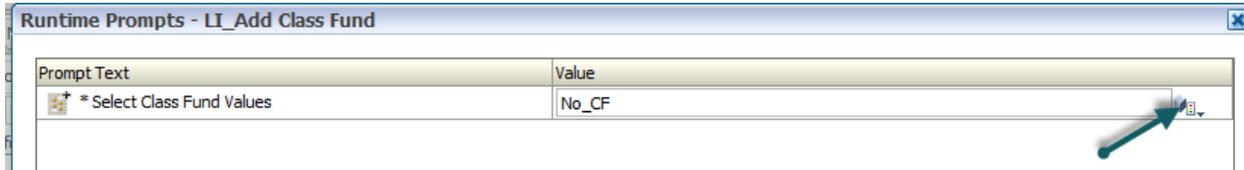


25. Right click in the empty space and choose “Add New Class Fund.”

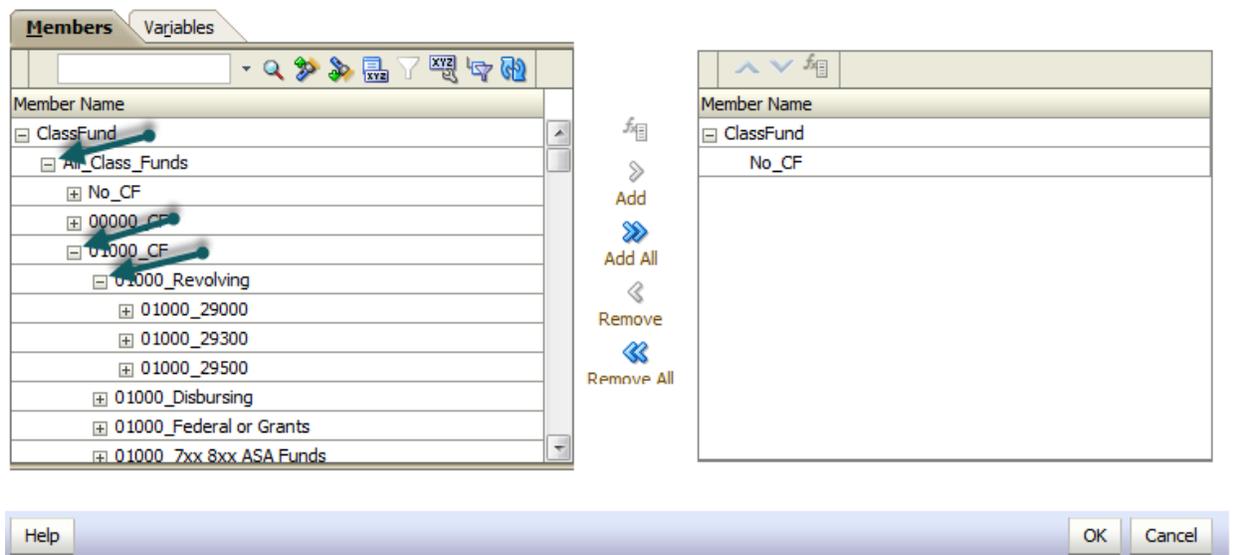


26. Choose a class fund. This can be entered in the following format: 5 digit business unit_5 digit class fund (i.e. 09000_20000). It can also be found through the member selector button on the right. For directions on this course, see below.

- To find the class fund, click the member selector button on the right.

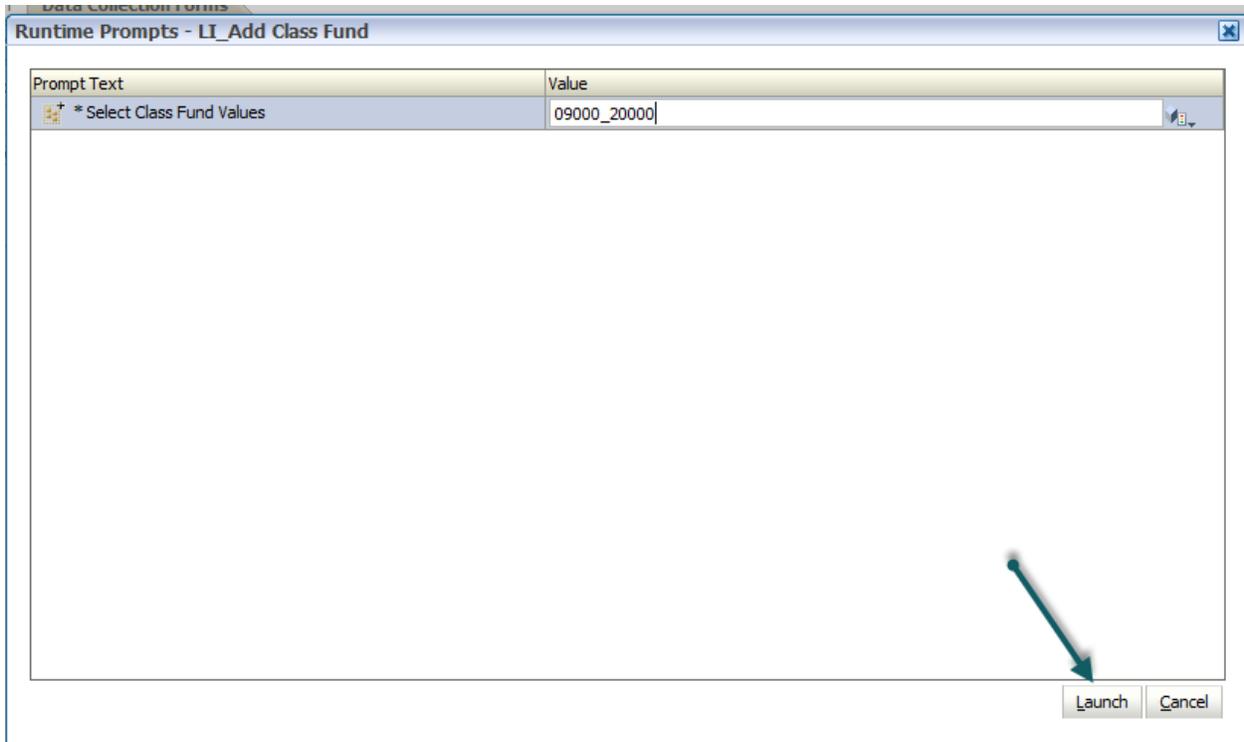


- Expand All Class Funds to find the correct fund. (This expansion will go down three levels.)

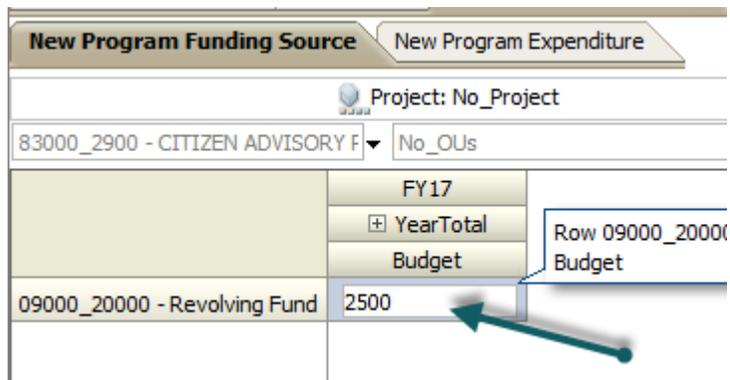


- Move the selection to the right pane by using the “Add” button and clicking OK.

27. Click Launch.



28. Enter the amount of revenue expected for the set POV.



29. Click on File then Save, or click on the Save Icon.

30. Change the POV and repeat the steps if needed to complete the entry of the funding change request.

Submission Instructions

There is a twofold process to the submission of an agency budget request, the submission of the decision packages and the submission of the agency information. Please see below for an outline of this process.

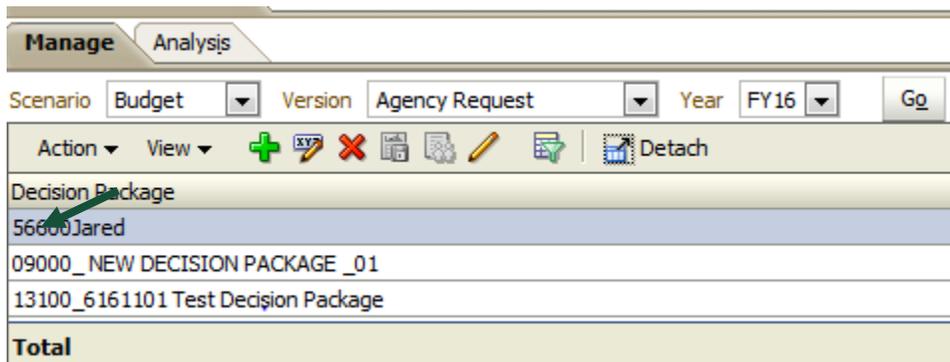
Steps to Submit Decision Packages:

To submit your decision packages, please do the following.

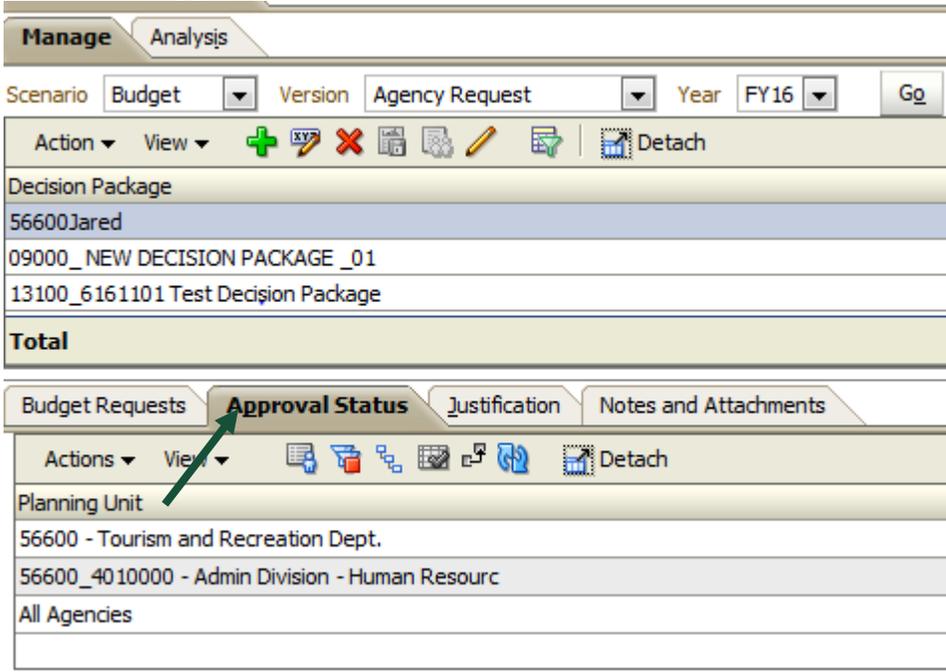
1. Go to **Number 11, Operational Decision Package**, on the task list.



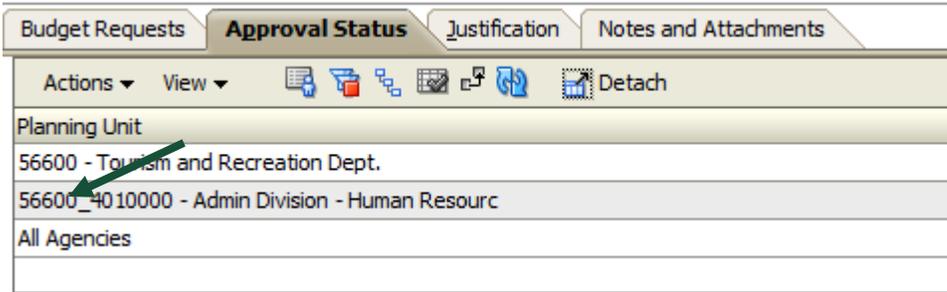
2. Click on the decision package you wish to approve.



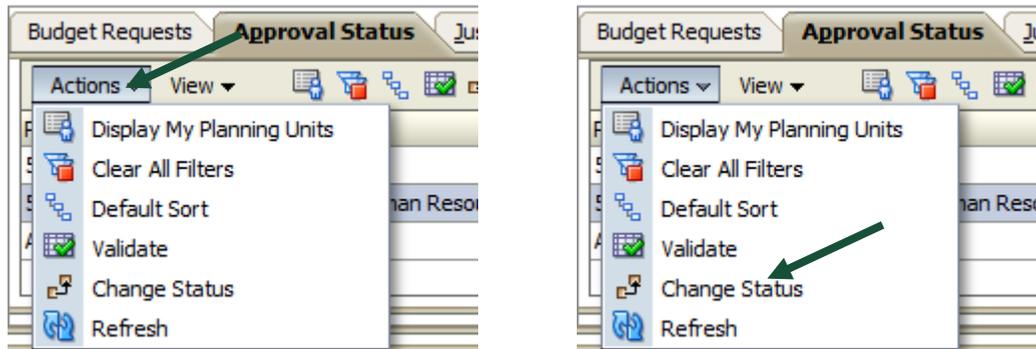
3. Click on the **Approval Status** tab on the bottom half of the screen.



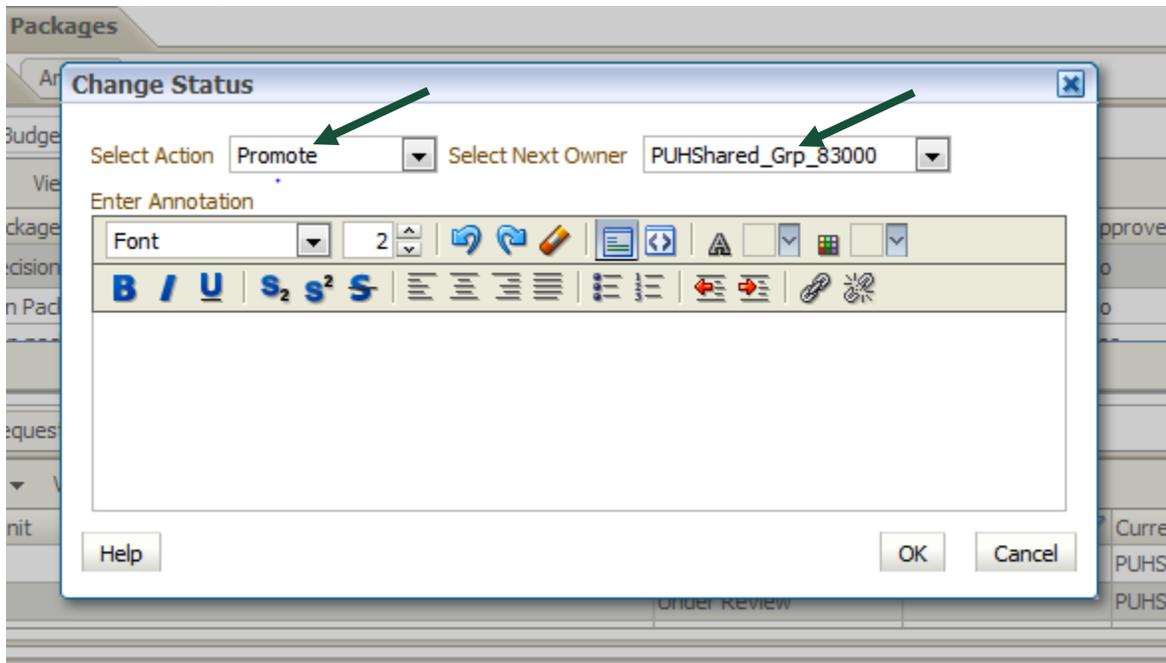
4. Click on the line with the division if one exists. If not, click on the line with the department.



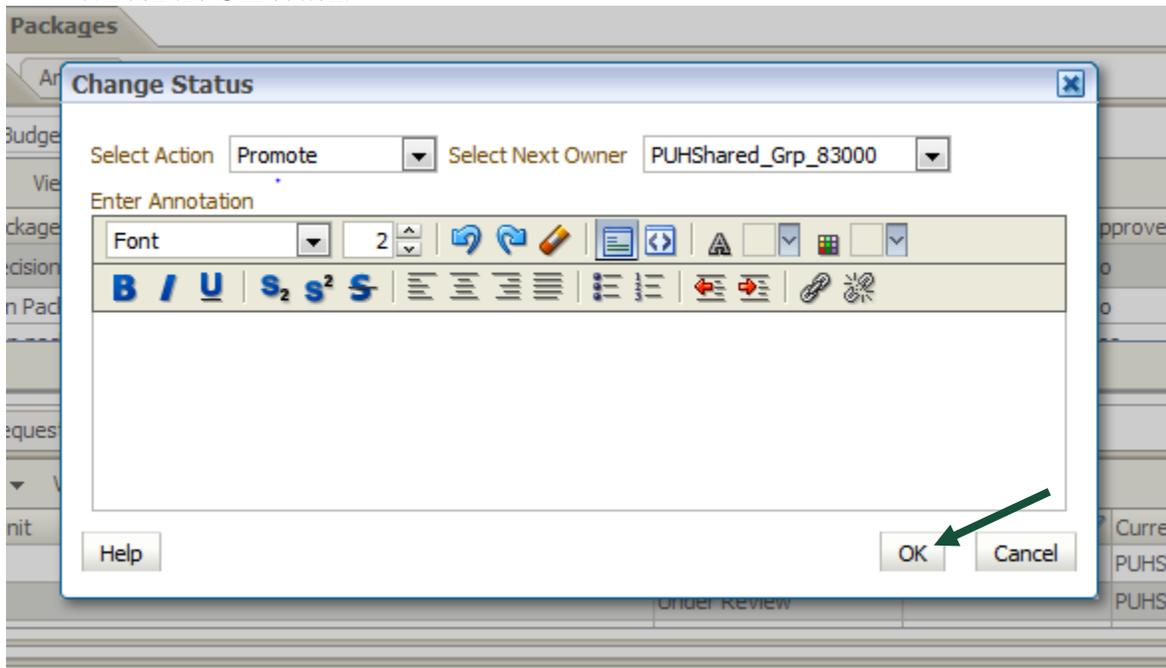
5. Click on the **Actions** button then **Change Status**.



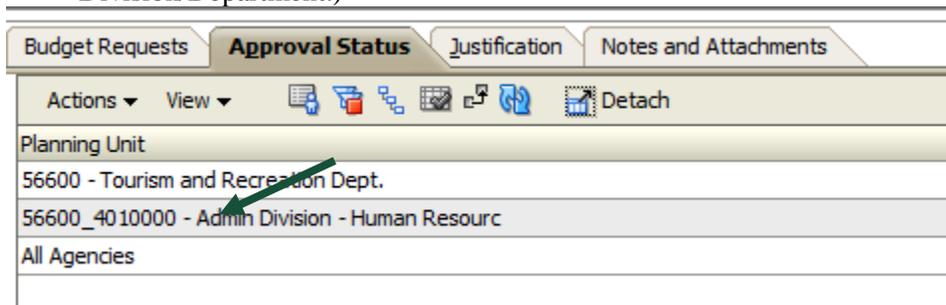
6. Change the status to **Promote** for the first box then **PUHshared_GRP_Your Agency Number** for the second box.



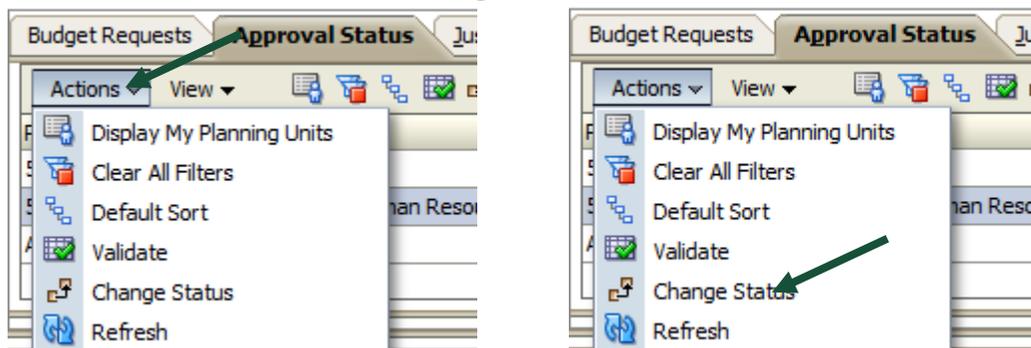
7. Push the **OK** button.



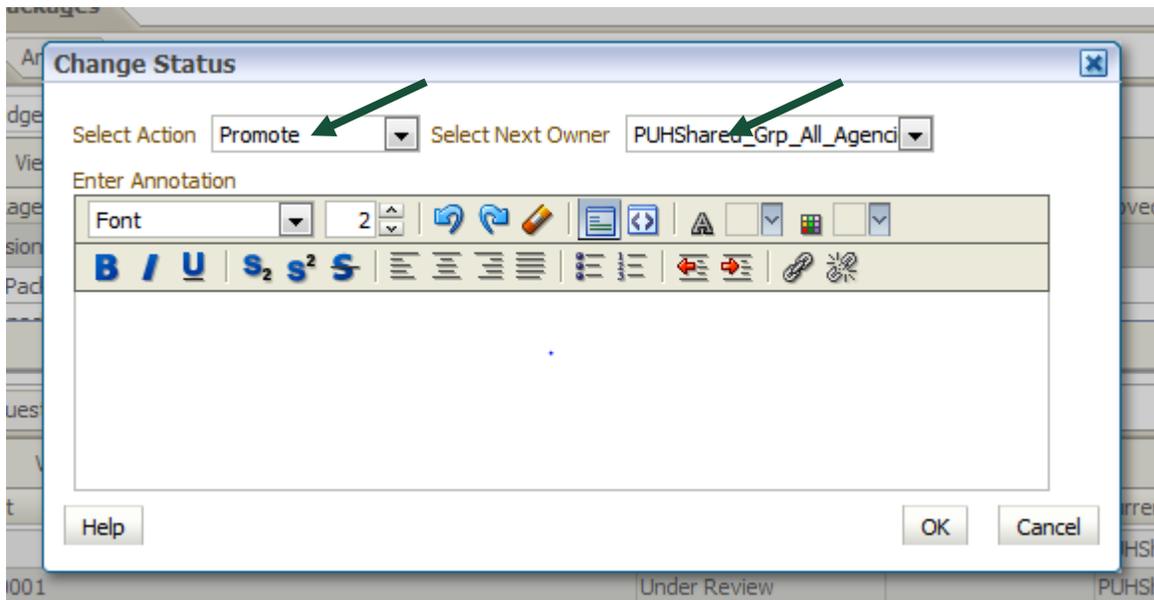
8. Click on the same division/department line. (There are two steps to approving each Division/Department.)



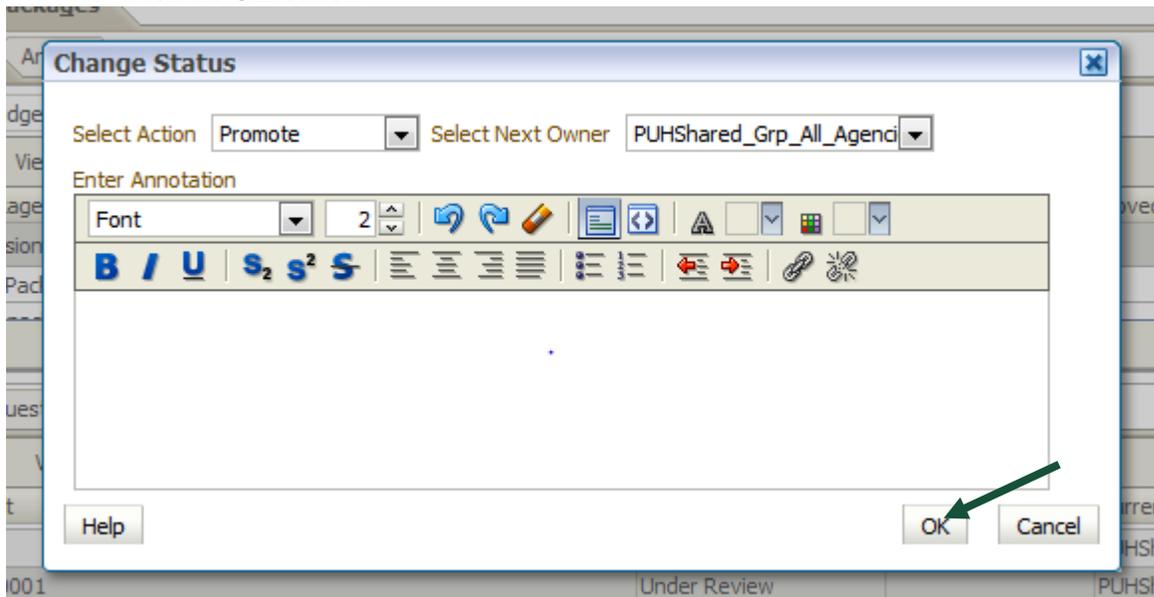
9. Click on the **Actions** button then **Change Status**.



10. Change the status to **Promote** for the first box then **PUHshared_GRP_All_Agencies** for the second.



11. Push the **OK** button.



12. The **Current Owner** column should say "PUHshared_GRP_All_Agencies." The **Location** Column should say "All_Agencies."

Budget Requests			
Approval Status			
Justification			
Notes and Attachments			
Actions	View	Detach	
Planning Unit	Approvals Status	Sub-Status	Current Owner Location
83000_21	Under Review		PUHShared_Grp_All_AgenciAll_Agencies
83000_2100001	Under Review		PUHShared_Grp_All_AgenciAll_Agencies

13. Repeat each step for each division or department inside that decision package if applicable.

Steps to Submitting Budget Request Information (Program info, KPMs, etc.) and Strategic Plan:

1. Go to **Number 8, Submit Budget for Approval** under Operational Budget Planning on the task list.

- 12. Operational Decision Package
- Operational Budget Planning
 - 1. Review Budget
 - 2. Read Budget Work Program Instructio
 - 3. Plan Agency Revenue
 - 4. Plan Agency Expenditure
 - 5. Appropriated Transfers IN_OUT
 - 6. Aggregate Budget
 - 7. Review Budget & Approp Budget
 - 8. Submit Budget for Approval

2. Go to the first division line. (When you change the division line, all relevant departments should change.)

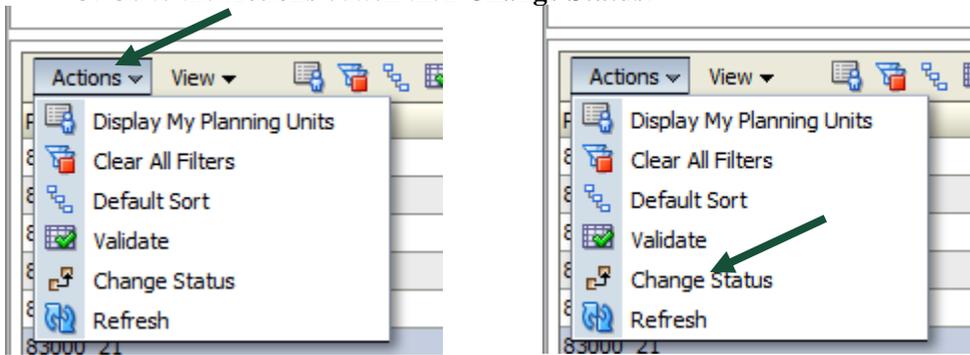
Task - 11. Submit Budget for Approval - Manage Approvals Task Instructions

Scenario Budget Version Agency Request Go

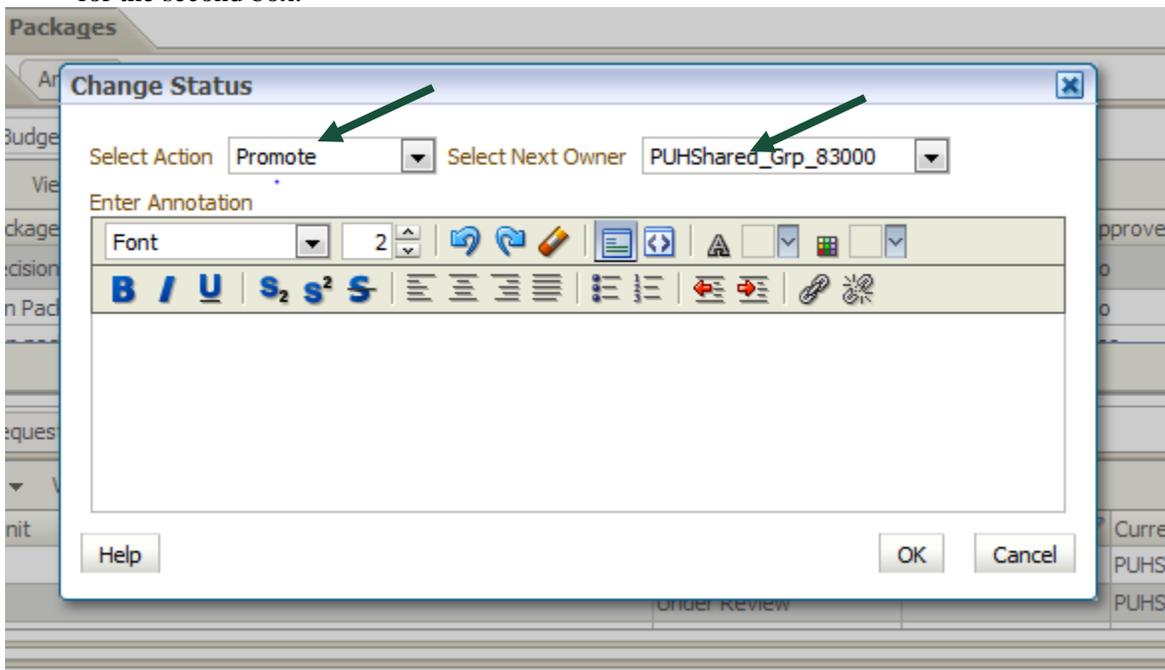
Process Status

Planning Unit	Approvals Status	Sub-Status	Current Owner	Location
00000_0500001 - Gear Up Scholarship Trust	Under Review		PUHshared_Grp_All_Agencies	All Agencies
00000_79 - Clearing and ASA Department	Under Review		PUHShared_Grp_All_Agencies	All Agencies
00000_79999999 - Clearing and ASA Department	Under Review		PUHShared_Grp_All_Agencies	All Agencies
00000 - Non Budgetary	Under Review		PUHShared_Grp_All_Agencies	All Agencies
00700 - OK Capitol Comp & Centerl Com	Under Review		PUHShared_Grp_00700	
00700_60 - General Operations	Under Review		PUHShared_Grp_00700	
00700_6000001 - General Operations	Under Review		PUHShared_Grp_00700	00700_6000001 - General Operations
00700_6000002 - General Ops Data Processing	Under Review		PUHShared_Grp_00700	00700_6000002 - General Ops Data Processing
00700_79 - Clearing and ASA Department	Under Review		PUHShared_Grp_00700	00700_79999999 - Clearing and ASA Department
00700_79999999 - Clearing and ASA Department	Under Review		PUHShared_Grp_00700	00700_79999999 - Clearing and ASA Department
00700_90 - Land Rush Monument	Under Review		PUHShared_Grp_00700	00700_9000001 - Land Rush Monument
00700_9000001 - Land Rush Monument	Under Review		PUHShared_Grp_00700	00700_9000001 - Land Rush Monument
00700_92 - Childrens Wellness Facility	Under Review		PUHShared_Grp_00700	00700_9200001 - Childrens Wellness Facility
00700_9200001 - Childrens Wellness Facility	Under Review		PUHShared_Grp_00700	00700_9200001 - Childrens Wellness Facility

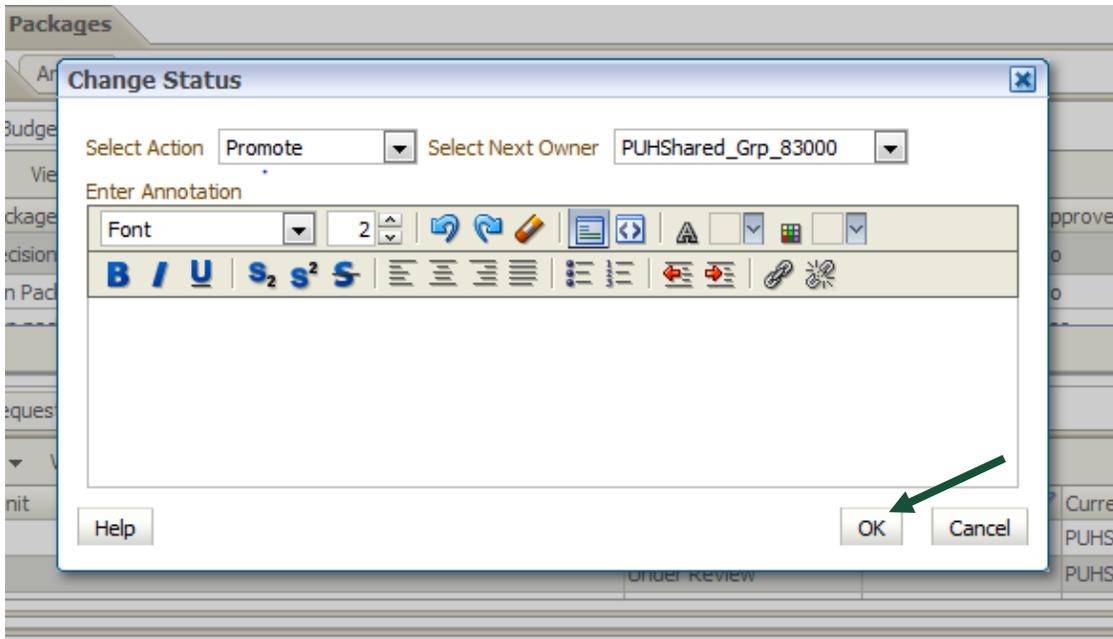
3. Go to the **Actions** button then **Change Status**.



4. Change the status to **Promote** for the first box then **PUHshared_GRP_Your Agency Number** for the second box.



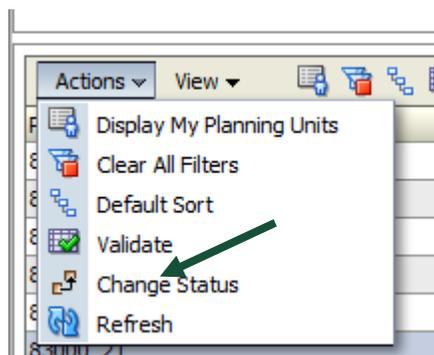
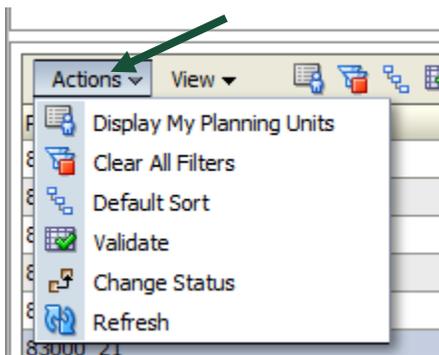
5. Push the **OK** button.



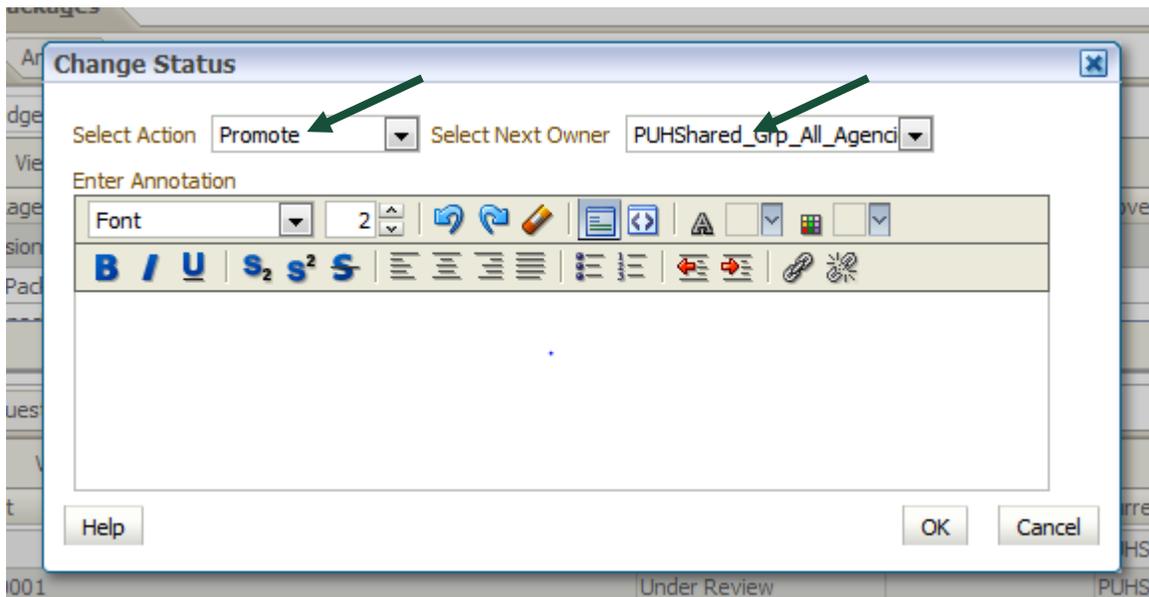
6. Click on the same division/department line. (There are two steps to approving each part.)

00700 - OK Capitol Comp & Centenl Com	Under Review	PUHShared_Grp_00700	
00700_60 - General Operations	Under Review	PUHShared_Grp_00700	
00700_6000001 - General Operations	Under Review	PUHShared_Grp_00700	00700_6000001 - General Operations
00700_6000002 - General Ops Data Processing	Under Review	PUHShared_Grp_00700	00700_6000002 - General Ops Data Processing
00700_79 - Clearing and ASA Department	Under Review	PUHShared_Grp_00700	00700_7999999 - Clearing and ASA Department
00700_7999999 - Clearing and ASA Department	Under Review	PUHShared_Grp_00700	00700_7999999 - Clearing and ASA Department
00700_90 - Land Rush Monument	Under Review	PUHShared_Grp_00700	00700_9000001 - Land Rush Monument
00700_9000001 - Land Rush Monument	Under Review	PUHShared_Grp_00700	00700_9000001 - Land Rush Monument
00700_92 - Childrens Wellness Facility	Under Review	PUHShared_Grp_00700	00700_9200001 - Childrens Wellness Facility
00700_9200001 - Childrens Wellness Facility	Under Review	PUHShared_Grp_00700	00700_9200001 - Childrens Wellness Facility

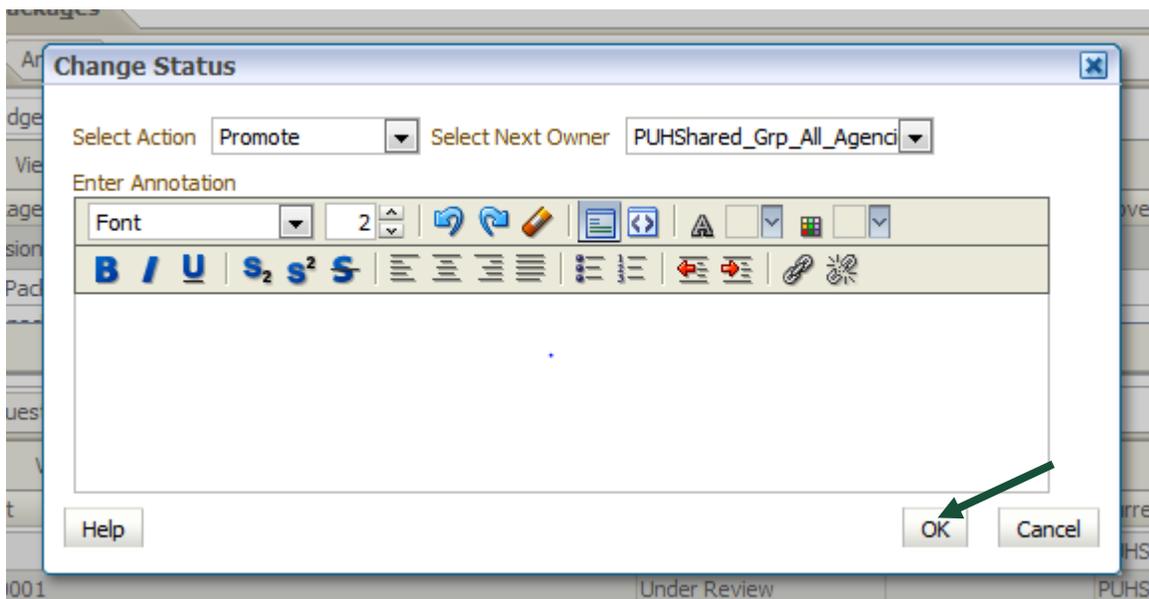
7. Click on the **Actions** button then **Change Status**.



8. Change the status to **Promote** for the first box then **PUHshared_GRP_All_Agencies** for the second.



9. Push the **OK** button.



10. The **Current Owner Column** should say “PUHshared_GRP_All_Agencies.” The **Location Column** should say “All_Agencies.”

Budget Requests		Approval Status	Justification	Notes and Attachments
Planning Unit	Approvals Status	Sub-Status	Current Owner	Location
83000_21	Under Review		PUHShared_Grp_All_Agen	All_Agencies
83000_2100001	Under Review		PUHShared_Grp_All_Agen	All_Agencies

11. Repeat each step for each division.