

# Instructions for the Submission of Decision Packages

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**Operating Budget Requests – 2024 Session**



**Department of Planning and Budget**

**August 2023**

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# Decision Package Overview

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## About the Decision Package Submission

This package provides guidance and instructions for the submission of operating budget decision packages to be considered as part of the Governor’s introduced 2024-2026 biennium budget and 2024 caboose bill. This submission is due to DPB by **September 29, 2023 (Changed from 9/5/23)**.

**Executive Department agencies should not submit decision packages to DPB without receiving approval from their applicable Cabinet Secretary. Please note that by submitting your decision packages to DPB, you are certifying that your Cabinet Secretary has approved that submission.**

More information will be provided at a later date regarding the validation of this certification.

To complete the submission, you will be using the Performance Budgeting system Decision Package module and optionally, the Decision Package Bulk Submit to DPB module. These modules can be found on the “Operating Budget” menu on the Performance Budgeting system work tray/main screen.

Detailed instructions on the use of the Performance Budgeting system modules are included later in this package under the section titled “Decision Package Module Detailed Instructions – Performance Budgeting System”. However, this package also highlights key topics such as technical adjustments, non-technical adjustments, personal services, non-personal services, nongeneral fund revenue sources, rate adjustments, and available reports.

Also included are instructions for the “bulk” submission of your decision packages. The bulk submission functionality is optional and allows agencies with multiple decision packages to submit them all to DPB at once.

## Technical versus Non-Technical Submissions

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It is important to distinguish between technical adjustments and non-technical adjustments in your decision packages. Technical adjustments are considered to be just one category of decision packages. As such, you will use the decision package module to submit technical adjustments as well as any non-technical decision package you would like to propose. If you intend for a budget request to be addressed as a technical adjustment, you must categorize it as “Technical Adjustment” in the “Category” field of the decision package “Overview” tab.

A technical adjustment is a proposal to modify your agency’s budget that does not involve changes in policy. Technical adjustments may involve things such as the transfer of dollars or positions between programs or service areas to reflect the correct implementation of budgeted amounts.

A non-technical decision package is a proposal to modify your agency's budget or to modify language in the Appropriation Act, that results in a new initiative, a change or clarification in policy, or a budgetary impact.

Each decision package (technical or non-technical) should address one budget action only. Each action should be a discrete unit that can be evaluated on its own merit independent of any other proposals. If you are not sure whether or not a request should be categorized as a technical adjustment or submitted under a non-technical category, contact your DPB budget analyst for guidance. Otherwise, the request should be submitted as a non-technical decision package.

# Personal Services

## Benefit Rates

If any of your technical adjustment decision packages involve personal services, you should use the rates included in the table below as applicable.

<i>Sub Object</i>	<i>Benefit</i>	<i>2024-26 Budget Development Rates/Factors<sup>1</sup></i>
<b>1111</b>	<b>VRS Retirement Contributions</b>	
	State Employees	14.46%
	Virginia Law Officers Retirement (VaLORS)	24.60%
	State Police (SPORS)	29.98%
	Judges (JRS)	30.67%
<b>1112</b>	<b>Social Security <sup>2</sup></b>	6.20% <b>capped</b> at \$160,200
<b>1112</b>	<b>Medicare</b>	1.45%
<b>1114</b>	<b>Group Life</b>	1.34%
<b>1115</b>	<b>Annual Employer Health Insurance Premiums</b>	
	<b>COVA Care</b>	
	Single	\$8,856
	Employee + One	\$15,840
	Family	\$23,220
	<b>COVA High Deductible</b>	
	Single	\$7,512
	Employee + One	\$13,992
	Family	\$20,448
	<b>HealthAware</b>	
	Single	\$8,676
	Employee + One	\$15,840
	Family	\$23,184
	<b>Kaiser Permanente</b>	
	Single	\$8,844
	Employee + One	\$15,732
	Family	\$22,992
	<b>Optima Health Vantage</b>	
	Single	\$8,796
	Employee + One	\$15,780
	Family	\$22,884
<b>1116</b>	<b>Retiree Health Insurance Credit Premium</b>	1.12%
<b>1117</b>	<b>VSDP &amp; Long-Term Disability Insurance</b>	0.61%
<b>1118</b>	<b>Teachers Insurance and Annuity<sup>3</sup> Plan 1</b>	10.40%
	<b>Teachers Insurance and Annuity<sup>3</sup> Plan 2</b>	8.50%
<b>1119</b>	<b>Defined Contribution Plan 1<sup>4</sup></b>	10.40%
	<b>Defined Contribution Plan 2<sup>4</sup></b>	8.50%
<b>1138</b>	<b>Deferred Compensation Match Payments</b>	One-half of employee's contribution per pay period, up to a max of \$20 per pay period or \$480 annually

## Notes on Benefit Rates

- <sup>1</sup> Percentages refer to percent of salaries. Health insurance premiums are the annual employer dollar cost for an individual.
- <sup>2</sup> The Social Security cap applies to calendar year 2023. Future year caps are unknown at this time.
- <sup>3</sup> For institutions of higher education: Teachers Insurance and Annuity (subobject 1118) includes alternative retirement options, such as TIAA-CREF, for those employees as defined in § 51.1-126 of the Code of Virginia. Plan 1 employees are those employees hired before 7/1/2010. Plan 2 employees were hired after 6/30/2010.
- <sup>4</sup> Subobject 1119, is used for employees eligible for a defined contribution plan established pursuant to § 51.1-126.5 of the Code of Virginia.

## Calculating the Cost of Personal Services

While the position planning grid within the Performance Budgeting system is capable of calculating the cost of personal services by position or role, it is recommended that you use the Excel position calculator posted where you downloaded these instructions to calculate the cost of any request for new positions. This position calculator will assist you with calculating personal services costs and will also help you create a file that can be uploaded into the PB system. Instructions for using this calculator and importing the resulting data into the PB system have also been posted on the DPB website. For any decision packages involving new positions, a copy of the completed Excel Position Calculator used to calculate the requested amounts should be attached to the decision package work item in the PB system.

## Requests for Salary Increases

For requests involving additional funds for employee salaries, agencies should address the extent to which current compensation levels are sufficient at recruiting, retaining, and motivating employees; how total compensation compares to what is offered by other relevant employers for similar positions; and the impact on the agency's ability to provide services and recruit, retain, and motivate employees. If you have any such requests, you should include this explanation in the "Explanations and Methodologies" field on the "Narratives" tab of the decision package module.

# Nonpersonal Services

For nonpersonal services, you should at minimum, array amounts by major object of expenditure unless a more detailed subobject detail is desired. You should use the allowable “XX95” nonpersonal convenience subobject codes listed in the table on the following page if arraying these amounts by major object. **No other budgetary convenience subobject codes should be used.**

If you choose to array your base budget by more detailed subobjects, you may also refer to the complete subobject code listing available at the following link:

[http://publicreports.dpb.virginia.gov/rdPage.aspx?rdReport=COA\\_SubObject](http://publicreports.dpb.virginia.gov/rdPage.aspx?rdReport=COA_SubObject)

For Executive Department agencies, you may choose to array base adjustment details to be more consistent with monthly financial reporting. To accomplish this, nonpersonal service costs may be arrayed to the “XX95” subobject code level with the exception of the information technology, rent, and lease related subobjects included in the following table:

1216	Telecommunications Services (provided by VITA)	1524	Equipment Capital Leases
1217	Telecommunications Services (provided by Non-State vendor)	1525	Building Capital Leases
1218	Telecommunications Services (provided by another State agency)	1526	Land Capital Leases
1271	Information Management Design and Development Services (provided by VITA)	1527	Land and Building Capital Leases
1272	VITA Pass Thru Charges	1531	Computer Rentals (not mainframe)
1273	Information Management Design and Development Services (provided by another State agency (not VITA) or vendor)	1532	Computer Processor Rentals
1274	Computer Hardware Maintenance Services	1533	Computer Software Rentals
1275	Computer Software Maintenance Services	1534	Equipment Rentals
1276	Computer Operating Services (provided by VITA)	1535	Building Rentals
1277	Computer Operating Services (provided by another State agency (not VITA) or vendor)	1536	Land Rentals
1278	VITA Information Technology Infrastructure Services (Provided by VITA)	1537	Land and Building Rentals
1279	Computer Software Development Services	1538	Building Rentals – State Owned Facilities - New
1292	VITA Services Provided to Out-of- Scope Agencies	1539	Building Rentals – Non-State Owned Facilities – New
1373	Computer Operating Supplies	1561	Computer Peripheral Installment Purchases
1521	Computer Capital Leases	1562	Computer Processor Installment Purchases
1522	Central Processor Capital Leases	1563	Computer Software Installment Purchases
1523	Computer Software Capital Leases	2211	Desktop Client Computers (microcomputers)
		2212	Mobile Client Computers (microcomputers)
		2214	Mainframe Computers and Components
		2215	Network Servers
		2216	Network Components
		2217	Other Computer Equipment
		2218	Computer Software Purchases
		2219	Development Tools Purchases

## Allowable Nonpersonal Services Convenience Codes

As previously indicated, for any portion of your base adjustment details where you are rolling nonpersonal services to a summary level of detail, you may use the budgetary convenience codes listed in the table below. You should not use other budgetary convenience codes.

1295	Undistributed Contractual Services
1395	Undistributed Supplies and Materials
1495	Undistributed Transfer Payments
1595	Undistributed Continuous Charges
2195	Undistributed Property and Improvements
2295	Undistributed Equipment
2395	Undistributed Plant and Equipment
3195	Undistributed Obligations

## Nongeneral Fund Revenue Source

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If you are requesting a decision package for nongeneral fund appropriation that will generate the collection of new or additional revenue above and beyond the base level of revenue that will be included in your nongeneral fund revenue estimate, you should complete the NGF Revenue Source tab in the decision package module. If you are requesting nongeneral fund appropriation that can be supported by existing revenue collections, you can skip this tab.

For details on completing this tab, see the Performance Budgeting System instructions included later in these instructions.

Note: You will receive separate instructions on submitting updates to your agency's overall nongeneral fund revenue estimates to be based on existing revenue collections.

## Rate Adjustments

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If you are a central service agency that provides services to other agencies and charges rates for these services, you will need to complete the Rate Adjustment tab in the decision package module if you anticipate a change in those rates. You should also explain in as much detail as possible the need for the rate adjustment and attach a spreadsheet showing the impact by agency in the Narrative tab.

For details on completing the Rate Adjustment tab, see the Performance Budgeting System instructions included later in these instructions.



# Reports

You may run a report of your decision package submissions by clicking on the [BD1.17 - Agency Budget Requests](#) link within the Performance Budgeting system reports menu. This report contains several options that allow you to run detailed reports on requested dollar amounts and authorized positions. There are options that allow the viewing of information in a summarized form and the creation of a formatted, more detail report. When the report is opened, it defaults to the following filter:

Agency Budget Requests

Hide Filter | Help

View Bookmarks | Save Bookmark

Biennium

2020-2022

Budget Round

Initial Bill

Amended Bill

Caboose Bill

Secretarial Areas

Administration

Agriculture and Forestry

Central Appropriations

Commerce and Trade

Education

Executive Offices

Agencies

100: Senate of Virginia

101: House of Delegates

102: Legislative Department Reversion Clearing

103: Magistrate System

104: Judicial Department Reversion Clearing

105: Virginia Commission on Intergovernmental

Request Type Group

Base Budget

Base Budget Adjustments

Decision Packages

Workflow Step

Draft

Agency Review

Ready for DPB Submission

DPB Review

Parked for Completion

Custom Title

Agency Budget Requests

Select an Output Option

Formatted

Summary Analysis Grid

Aggregate Dollars

Dollar Details Analysis Grid

Aggregate Positions

Positions Details Analysis Grid

More Filters

Agency Decision Package Category

\*

Appropriation Act language only

Budget reductions

Caseload or workload adjustments

Discretionary Reappropriation

Submit

You may filter out Technical Adjustments and Information Technology requests that were part of a separate submission by selecting all items in the “Agency Decision Package Category” except those two categories. To open the “Agency Decision Package Category” filter, click the “More Filters” link.

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# Decision Package Module Instructions - Performance Budgeting System

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The decision package module is used for proposals to modify your agency's budget or to modify language in the Appropriation Act. These proposals will be in the form of either technical or non-technical adjustments.

Each decision package in this submission should address and justify one budget action only. The action proposed in each decision package should be a discrete unit that can be evaluated on its own merit, independent of any other proposals. Under certain circumstances, several strategies or actions may be tightly related and cannot be viewed independently. If so, they may be grouped together in one decision package.

To access the decision package module, select "Decision Packages" within the "Decision Package sub-menu under the "Operating Budget" link on the Performance Budgeting System work tray / main screen. Detail instructions below will explain how to create a decision package.

If you have any questions of a policy nature, please contact your DPB budget analyst. If you experience technical issues with the Performance Budgeting System, you can use the "Service Desk Request" option on the top menu within the Budgeting application to open a ticket or you can contact the PB Help Desk at the email address [PBHelpDesk@vita.virginia.gov](mailto:PBHelpDesk@vita.virginia.gov)

## Decision Package Module Quick Guides

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### AGENCY ANALYST QUICK GUIDE

1. Mouse over the Operating Budget functional area menu item and then mouse over Decision Packages. From the resulting dropdown menu, select Decision Packages and the Overview tab will appear.
2. Complete the Overview tab as described in the Overview tab instructions.
3. Complete the Narratives tab as described in the Narratives tab instructions.
4. Complete the NGF Revenue Source tab as described in the NGF Revenue Source tab instructions. This tab only needs to be completed if there is an NGF Revenue impact for the decision package.
5. Complete the Position Planning tab as described in the Position Planning tab instructions. This tab only needs to be completed if positions are requested or impacted by this request, including position reductions.
6. Complete the Budget Detail tab as described in the Budget Detail tab instructions.
7. Complete the Budget Summary tab as described in the Budget Summary tab instructions.
8. Click Submit and select the appropriate action from the available options.
  - a. Continue Working - Saves the decision package and returns the work item to the Available Work Items tab on the Work Tray for users with similar credentials to claim.

- b. Submit for Agency Review - Submits the decision package to the next step in the workflow.
- c. Void Document - Voids the decision package.

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## AGENCY REVIEWER QUICK GUIDE

NOTE: Ensure that all decision packages have been prioritized in the Decision Package Prioritization module. All decision packages must be prioritized before they can be submitted to DPB.

1. Click on *Available to be Claimed* from the Work Tray.
2. Select the Document Type filter and select Decision Package to filter on the decision packages.
3. Click *Claim* next to a decision package that is ready for review. Once a decision package is claimed, the Overview tab will appear.
4. Review the Overview tab for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
5. Click on the Budget Summary tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
6. Click on the Narratives tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
7. Click on the NGF Revenue Source tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
8. Click on the Budget Detail tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
9. Click on the Position Planning tab and review for completeness and accuracy. Refer to the DPB transmittal for any policy guidance.
10. The Rate Adjustment tab is not appropriate for this submission. Please ignore this tab.
11. Click Submit and select the appropriate action from the available options.
  - a. Continue Review - Saves the decision package and returns the work item to the Available Work Items tab on the Work Tray for users with similar credentials to claim.
  - b. Ready For DPB Bulk Submit – Places the decision package in a batch to be submitted to DPB via the Decision Package Bulk Submit to DPB module. (Make sure you also rank the decision package in the Decision Package Prioritization module.)
  - c. Return for Further Data Entry - Returns the decision package to the data entry workflow step.
  - d. Void Document - Voids the decision package.

# Overview Tab

## Overview Tab Overview

The purpose of the **Overview** tab is to describe the decision package and select the level at which the budget details will be entered. Additionally, the ability to specify if new legislation or Appropriation Act language changes and attach a file related to those changes is provided.

The screenshot shows the 'Overview' tab of a budget system. At the top, there's a navigation bar with tabs like 'Work Tray', 'Operating Budget', 'Capital Budget', 'Budget Execution', 'Six-Year Plans', 'Narrative', 'Strategic Planning', 'Help Request', 'Administration', 'Reporting', and 'Logout'. Below this is the 'Enter Decision Package' section with buttons for 'Help', 'Print', 'Save', 'Validate', and 'Submit'. The 'Overview' sub-tab is active, showing a form with fields for 'Agency' (136: Virginia Information Technologies Agency), 'Biennium' (2020-2022), 'Budget Round' (Initial Bill), 'Title' (Eliminate appropriation for Workplace Productivity Solutions service), and 'Category' (Technical Adjustment). Below the form is a 'Strategic Link' table with columns for 'Measures', 'GF Percentage', and 'NGF Percentage'. The table has one row with a search icon. At the bottom, there's an 'Agency Description' text area containing funding information, checkboxes for 'Will new legislation be required as a result of this request?' and 'Is Appropriation Act Language required as part of this request?', and a section for 'Supporting Legislation' with 'No Files Uploaded' and an 'Upload File' button.

## Overview Tab Instructions

1. Click on the Overview tab.
2. Select the **Agency** to which the decision package will be applied.
3. Select the **Biennium** to which the decision package will be applied. (2024-2026 is the default, if you want to request a caboose bill amendment, select 2022-2024.)
4. Make sure the correct **budget round** is selected (*initial budget* is the default).
5. Enter the **Title** for the decision package.

Insert a short descriptive title. Remember that your title should begin with a verb such as increase, add, reduce, transfer, shift, expand, etc.

6. Select the **Category** for the decision package.

Select the category that most closely defines the proposed decision package. (*Appropriation Act language only, Caseload or workload adjustments, Unanticipated and unavoidable cost adjustments, etc.*)

7. **Strategic Link grid.** You should skip this field. At this time, the update of the Strategic Plan information has not been completed so linking to the old information is not recommended.

8. Select the **Region** of the state that the decision package most impacts. If it impacts more than one region, select "Multiple Regions".
9. **Enterprise Strategy.** You should skip this field. At this time Strategic Plan information has not been updated so linking to the old information is not recommended.
10. Enter the **Agency Description** for the decision package.

Summarize the actions your agency proposes to take with the requested dollars or positions. If the decision package is for language only, explain what the language will allow the agency to do. In addition, provide information to indicate the need for the proposed service and the projected return on the requested investment. Cite quantitative data wherever possible. Please keep this description as brief as possible while describing the need and projected outcomes of the budget request.

11. Check **Will new legislation be required as a result of this request?** if new legislation is required as a result of the decision package.
12. Check **Is Appropriation Act Language required as part of this request?** if Appropriation Act language is required for the decision package.
13. Upload any supporting documentation for the decision package by clicking Browse, selecting the file to be uploaded, and clicking the Upload button.

Note: This will be required if either the check box for new legislation or new Appropriation Act Language is checked.

# Narratives Tab

## Narratives Tab Overview

The purpose of the **Narratives** tab is to capture the justification for the decision package. Remember, quality is important! Decision-makers may have only your narrative as a basis for evaluating your agency's proposal. You will need to be as thorough as possible to explain what the proposal involves and why it should be funded.

The screenshot shows the 'Enter Decision Package' interface with the 'Narratives' tab selected. The top navigation bar includes links for Work Tray, Operating Budget, Capital Budget, Budget Execution, Six-Year Plans, Narrative, Strategic Planning, Help Request, Administration, Reporting, and Logout. Below this, a secondary bar contains buttons for Help, Print, Save, Validate, and Submit. The main content area has tabs for Overview, Budget Summary, Narratives (selected), NGF Revenue Source, Budget Detail, Position Planning, Rate Adjustment, and Validation. The form fields are as follows: Agency (136: Virginia Information Technologies Agency), Biennium (2020-2022), Budget Round (Initial Bill), Title (Eliminate appropriation for Workplace Productivity Solutions ser), and Category (Technical Adjustment). There are three text areas: 'Consequences of not funding/Justification' with the text 'The appropriation for Fund 0932 (Program 82803) will remain available but will not be used.', 'Alternatives considered (must list at least one)' with the text 'Do nothing. This would leave budget funding in Chapter 2 that will not be utilized.', and 'Explanations and Methodologies' with the text 'To remove all but \$150,000 in FY2020 and the complete appropriation - \$1,110,137 in FY2021 and forward.' At the bottom, there is a section for 'Supporting Documentation' showing 'No Files Uploaded' and a '+ Upload File' button.

## Narratives Tab Instructions

1. Click on the **Narratives** tab.
2. Enter the Consequences of not funding/justification.  
Indicate the consequences you expect if your proposal is not approved. Detail how not funding this action will impact the agency's performance measures and targets.
3. Enter the Alternatives considered (must list at least one).  
Indicate any other alternatives you considered for accomplishing the objectives of the request and why you selected the proposed action. Briefly list the pros and cons of each alternative.
4. Enter the Explanations and Methodologies.  
Explain how you calculated your request, any assumptions used, and the methodology used. Enter as much detail as necessary to fully explain the methodologies used.
5. Attach any Supporting Documentation to further justify the need for the decision package.

# Budget Summary Tab

## Budget Summary Tab Overview

The purpose of the **Budget Summary** tab is to capture the high-level general fund (GF) and nongeneral fund (NGF) six-year budget impact for the decision package. The information on this tab can be entered before the **Budget Detail** tab is completed as a placeholder if an agency is unsure if they are going to submit a decision package to DPB. If the **Total Services** grid on the **Budget Detail** tab has already been entered, the Summarize Budget functionality can be used to populate the first two years of the **Summary of Costs and Positions** grid based upon the data entered in the **Total Services** grid.

The screenshot shows the 'Budget Summary' tab in a software application. At the top, there's a navigation bar with tabs like 'Work Tray', 'Operating Budget', 'Capital Budget', 'Budget Execution', 'Six-Year Plans', 'Narrative', 'Strategic Planning', 'Help Request', 'Administration', 'Reporting', and 'Logout'. Below this is a sub-header 'Enter Decision Package' with buttons for 'Help', 'Print', 'Save', 'Validate', and 'Submit'. The main area has a tabbed interface with 'Overview', 'Budget Summary' (selected), 'Narratives', 'NGF Revenue Source', 'Budget Detail', 'Position Planning', 'Rate Adjustment', and 'Validation'. In the 'Budget Summary' tab, there are input fields for 'Agency' (136: Virginia Information Technologies Agency), 'Biennium' (2020-2022), 'Budget Round' (Initial Bill), 'Title' (Increase appropriation for extension of network to data center), and 'Category' (Information technology). A 'Summarize Budget' button is present. Below these is a table titled 'Summary of Costs and Positions' with columns for Object Type, FY 2021 Req, FY 2022 Req, FY 2023 Req, FY 2024 Req, FY 2025 Req, FY 2026 Req, and One-Time. The table contains 8 rows of data. At the bottom, there are 'Import', 'Export', and 'Refresh' buttons, a page indicator 'Page 1 of 1', and a 'View 1 - 8 of 8' link.

	Object Type	FY 2021 Req	FY 2022 Req	FY 2023 Req	FY 2024 Req	FY 2025 Req	FY 2026 Req	One-Time
1	GF Dollars	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>
2	NGF Dollars	\$1,067,600	\$1,067,600	\$0	\$0	\$0	\$0	<input type="checkbox"/>
3	GF Positions	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
4	NGF Positions	0.00	0.00	0.00	0.00	0.00	0.00	<input type="checkbox"/>
5	Layoffs	0	0	0	0	0	0	<input type="checkbox"/>
6	GF Transfer	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>
7	GF Revenue	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>
8	Additions to Balance	\$0	\$0	\$0	\$0	\$0	\$0	<input type="checkbox"/>

## Budget Summary Tab Instructions

1. Click on the **Budget Summary** tab.
2. If the data has already been entered in the **Total Services** grid on the **Budget Detail** tab, click Summarize Budget. This will populate the GF and NGF data for the first two years in the **Summary of Costs and Positions** grid based upon the data entered in the **Total Services** grid on the **Budget Detail** tab.
3. Enter the out-year impact for the decision package in the **Summary of Costs and Positions** grid and, if entering Budget Summary first, enter data for the two years of the biennium for which work is currently being completed. Agencies must enter data for all six years even if the amount is zero.
4. If the decision package results in a change in general fund resources/revenue, enter the amount in the applicable row at the bottom of the summary grid. "GF Transfer" is for nongeneral fund cash transfers to the general fund, "GF Revenue" is for changes in general fund revenue coming into the Commonwealth, and "Additions to Balance" is for the reversion of general fund balances from agencies to the General Fund.

## Budget Detail Tab

### Budget Detail Tab Overview

The purpose of the **Budget Detail** tab is to capture the budget details, line by line, for the decision package. A user will be required to enter the program (including service area), fund, subobject, and FY 20XX and 20XX dollars for each budget line associated with the decision package. If a user specifies that they will be budgeting at the cost code and/or project code levels, then they will be allowed to enter this level of detail when entering the budget details.

The screenshot shows the 'Enter Decision Package' window with the 'Budget Detail' tab selected. The interface includes a top navigation bar with various tabs like 'Work Tray', 'Operating Budget', 'Capital Budget', etc. Below the navigation bar, there are input fields for 'Agency' (136: Virginia Information Technologies Agency), 'Biennium' (2020-2022), 'Budget Round' (Initial Bill), 'Title' (Increase appropriation for extension of network to data center), and 'Category' (Information technology). The main area features a 'Total Services' grid with columns for Program, Fund, Subobject, FY 2021 Dollars Req, FY 2022 Dollars Req, and One-time Funding?. A single row is visible with the following data: Program: 82003: Network Service, Fund: 06136: VITA Internal Ser, Subobject: 1273: Information Manag, FY 2021 Dollars Req: \$1,067,600, FY 2022 Dollars Req: \$1,067,600, and One-time Funding? checkbox is unchecked. At the bottom, there are buttons for 'Add', 'Import', 'Export', 'Clear', 'Choose Rows', and 'Refresh', along with a page indicator showing 'Page 1 of 1' and a 'View 1 - 1 of 1' status.

	Program	Fund	Subobject	FY 2021 Dollars Req	FY 2022 Dollars Req	One-time Funding?
1	82003: Network Service	06136: VITA Internal Ser	1273: Information Manag	\$1,067,600	\$1,067,600	<input type="checkbox"/>

### Budget Detail Tab Instructions

1. Click on the **Budget Detail** tab.
2. If applicable, confirm the personal services data that populated the **Total Services** grid from the **Position Planning** tab is correct. If the data is incorrect, return to the **Position Planning** tab to make corrections and then repopulate the data as described in the **Position Planning** tab instructions.
3. In the **Total Services** grid, enter the Program (program, service area and component), Fund, and Subobject for each nonpersonal services budget line. Additionally, if applicable for the budget line, enter the Cost Code and/or Project Code.
4. Enter the FY 20XX Dollars for the budget line.
5. In the **Total Services** grid, if the budget line specified is one-time funding, check the One-time Funding checkbox. If a budget line contains a mix of one-time and ongoing funding, create a separate line for the one-time amount and another for the ongoing funding requirements.
6. Add rows to the **Total Services** grid as needed to specify multiple nonpersonal services budget lines by using the button.



# Position Planning Tab

## Position Planning Tab Overview

The purpose of the **Position Planning** tab is to capture position changes associated with the decision package. Once the positions are entered, the personal services budget can be automatically calculated and the resulting budget data can be used to populate the personal services subobjects in the **Total Services** grid on the **Budget Detail** tab. The position planning tab allows you to enter authorized position and salary information by either position or role which will in turn allow you to calculate the overall cost of new positions to include compensation and benefits. Alternatively, you may enter just the authorized position information by selecting the "Not Budgeting by Role or Position" option.

Work Tray Operating Budget Capital Budget Budget Execution Six-Year Plans Narrative Strategic Planning Help Request Administration Reporting Logout

Enter Decision Package Help Print Reload Cancel Save Validate Submit

Overview Budget Summary Narratives NGF Revenue Source Budget Detail **Position Planning** Rate Adjustment Validation

Agency 122: Department of Planning and Budget Biennium 2020-2022 Budget Round Initial Bill ABC

Title This is a information technology request Category Information technology

Not Budgeting by Role or Position ☒

Position Planning						
	Program	Fund	Salary Subobject	FY 2021 Positions Req	FY 2022 Positions Req	One-time Funding
1	All	All	All	0.00	0.00	<input type="checkbox"/>

Add Import Export Clear Choose Rows Refresh Page 1 of 1 100 View 1 - 1 of 1

## Position Planning Tab Instructions

### Not Budgeting by Position or Role

Use this option to record authorized positions only in the position planning grid. This is the recommended method for this submission. Use this method in conjunction with the Position Calculator on the DPB website to calculate personal services costs. See the "Calculating the Cost of Personal Services" section of these instructions for more information.

1. Click on the **Position Planning** tab.
2. Check the **Not Budgeting by Position or Role** checkbox.
3. In the **Position Planning** grid, enter the total number of positions for the Agency for both the first year and second years of the biennium in the **FY 20XX Positions** cells.
4. Add rows to the **Position Planning** grid, by clicking the **Add** button in the lower left corner of the grid as needed.

- Authorized positions can also be uploaded from an Excel file.

### Position Planning by Role / Position Planning by Position

Using the Position Planning grid to calculate Personal Services costs by role or position is not recommended for these submissions. Instead, use the “Not Budgeting by Role or Position” option (above) for authorized positions and the Position Calculator on the DPB website to calculate the dollar costs. See the “Calculating the Cost of Personal Services” section of these instructions for more information.

## NGF Revenue Source Tab

### NGF Revenue Source Overview

The purpose of the **NGF Revenue Source** tab is to capture a six-year estimate of any NGF Revenues that will be generated from the decision package. The revenue estimate should include any nongeneral fund revenue that the agency will collect, receive from another agency, or send to another agency based upon the implementation of the decision package. This tab should only be completed if there is a nongeneral fund request/impact. This is over and above amounts in the six-year nongeneral revenue fund estimates module.

Overview Budget Summary Narratives **NGF Revenue Source** Budget Detail Position Planning Rate Adjustment Validation

Agency 122: Department of Planning and Budget Biennium 2018-2020 Budget Round Initial Bill ABC ✓

Title Category

**NGF Revenue Estimate**

	Fund	Revenue Source	Revenue Action	Agency	FY 2019 Dollars Req	FY 2020 Dollars Req	FY 2021 Dollars Req
1	Q	Q		Q			

< >

Add Import Export Clear Refresh Page 1 of 1 100 View 1 - 1 of 1

### NGF Revenue Source Instructions

- Click on the **NGF Revenue Source** tab
- In the **NGF Revenue Estimate** grid, enter the fund and revenue source code associated with the nongeneral fund revenue.
- In the **NGF Revenue Estimate** grid, select the Revenue Action (send to or receive from) and Agency (pass through or may be blank) associated with that action if applicable.

4. In the **NGF Revenue Estimate** grid, enter anongeneral fund revenue estimate for six years in the columns labeled with the out-years, FY 20XX Dollars.
5. In the **NGF Revenue Estimate** grid, click on the Methodology cell for revenue source that is currently being estimated. In the popup window that appears, enter the methodology used to make the estimate.
6. Add rows to the **NGF Revenue Estimate** grid as needed to specify multiple nongeneral revenue sources for the decision package by using the button shown below.

## Rate Adjustment Tab

### Rate Adjustment Tab Overview

The purpose of the **Rate Adjustment** tab is only for central service agencies that anticipate a change in their assessed rates for internal service fund services they provide to other state government agencies. A spreadsheet showing the impact of the proposed rate change, by agency, must be attached to the **Narratives** tab.

### Rate Adjustment Tab Instructions

1. Click on the **Rate Adjustment** tab.
2. In the **Rate Adjustment** grid, enter a Rate Name for rate that will be adjusted.  
Enter the official name/title of the rate as it is commonly known.
3. In the **Rate Adjustment** grid, enter the Current Rate, Current Unit, Current Number of Units, and the most Current Date Implemented for the rate that will be adjusted.
4. In the **Rate Adjustment** grid, enter the Proposed Rate, Proposed Unit, Proposed Number of Units, and the Proposed Effective Date for the rate that will be adjusted.

5. Enter the FY 20XX Revenue Impact for the rate that will be adjusted, where XX is the first and second years of the biennium and the four out-years.
6. Enter the Rationale for Rate Change for the rate that will be adjusted. Associated/required narrative fields can be found on the narratives tab.

Describe the anticipated results or objectives your agency expects to accomplish if the proposed rate adjustment is approved.

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# Decision Package Bulk Submit Instructions

## Performance Budgeting System

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### Bulk Submit Overview

The purpose of the Decision Package Bulk Submit to DPB module is to allow an agency to submit all their decision packages to DPB at once.

Agency: 136: Virginia Information Technologies Agency

Set all to: -- Please Select --

Submit

Base Budget Adjustments		
	Agency	Document Title
1		

Submit Action

Export Refresh

Page 1 of 1 50

View 1 - 1 of 1

### Bulk Submit Instructions

1. To ensure that all requests are accounted for, look at the **Document Title** column to review the base budget adjustments.
2. Confirm that the **Step Title** and **State** fields are correct for each of the base budget adjustments.
3. To bulk manage the submit action, click the **Set all to** dropdown and select the submit action that the requests require: Submit to DPB, Continue Review, or Return to Previous Submitter. If submitting to DPB, all requests must be set to Submit to DPB. The submit actions correspond to the submit actions in the Decision Package module documentation.
4. Click the **Submit** button. A message will display in the text box below the submit button to alert you that the submission was successful. If you receive a message that one or more work items could not be submitted, you should navigate to the work tray and open the work items to determine if they are failing validation rules for some reason.