

# Mid-Biennium Budget Adjustment Issue Details Instructions

## Purpose

- To provide a distinct “decision point” developed by the agency for its budget request within which the agency requests a change in appropriation and/or personal service limitation for FY2015-16 and/or FY2016-17 for consideration by the Governor and Legislature. The change is relative to the current appropriation and personal service limit level for that particular year. Issues are categorized into Issue Types. They include Agency Issues (specific to the agency), IT Issues (an issue created to accompany an IT Project Proposal to be submitted to the NITC), and Multi-Agency Issues (an issue in which two or more agencies collaborate). Multi-Agency Issues are created by the State Budget Division and assigned at the request of an agency or agencies. See page 7 for more information regarding specific narrative instructions for the current deficit cycle.

### Start-Up TIP

If any of the drop-down menus fail to show expected choices, you may need to have your **Security** settings adjusted.

Contact your agency administrator or the State Budget Division for assistance.

## Getting Started

In the left-margin menu, click “**Issue Details**”. The **Issue Details** screen will load.

- Select the appropriate deficit budget cycle. **Budget Cycle** defaults to the current cycle.
- Select **Agency** and **Version** from the options that have been assigned to you (see Time-Saver Tip on the right margin).

### Create a New Agency Issue

- Select **Agency Issue** from the **Issue Type** drop-down menu and then select “=== New ===” from **Issue**.

The screenshot shows the 'Issue Details' form with the following fields: Budget Cycle (2016 Mid-Biennium), Agency (065 - ADMINISTRATIVE SERVICES), Version (A1 - AGENCY REQUEST), and Issue Type (Agency Issue). The Issue dropdown menu is open, showing options: --Select, --Select, and == NEW ==. A copyright notice for the State of Nebraska is visible at the bottom of the form.

- The system will enter NEW mode. While in NEW mode, you must enter the Issue Name and **Save** before you can select a different tab.

### Time-Saver TIP

Set default options to avoid repetitive selections of **Agency** and **Version**.

Go to **User Options** in the upper right corner of any screen. Once your selections are made, press **Save**.

The screenshot shows the 'Issue Narrative' tab selected. The 'Issue Name' field contains 'New Issue' and the 'Description' field is empty. There are tabs for 'Narrative', 'Request', and 'Summary' at the top.


- Enter **Issue Name** and **Description** for the Issue and click **Save**. The name of the Issue will now appear beside **Issue**.
- Continuing on the issue’s **Narrative** tab, begin to enter narrative information. See page 7 for content guidelines on each tab.
  - The narrative tab currently selected appears in the **information bar**.
  - Narrative tabs with two edit windows are limited to a pre-defined minimum and maximum number of characters based on the screen. Text in the limited edit windows should be viewed as a summary of what is presented in the second, unlimited window. The limited window is intended to be included in various standardized reports that will be generated from the system.

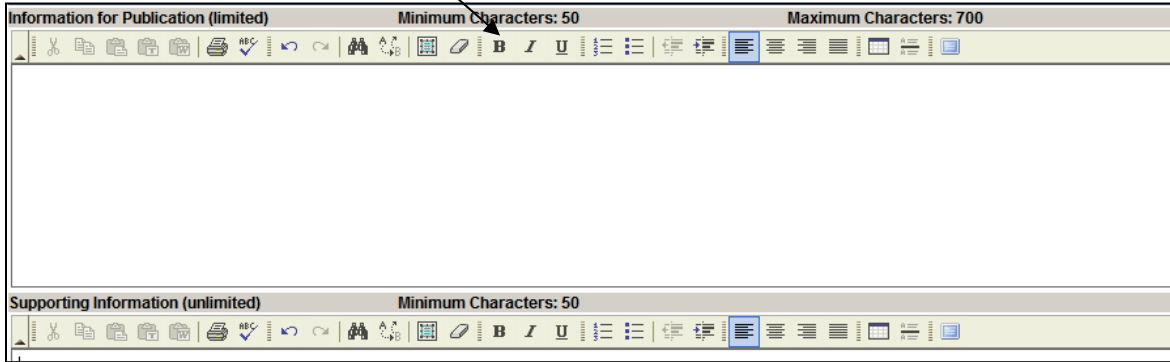
The screenshot shows the 'Description of Request' tab selected. The 'Information for Publication (limited)' section has a character limit of 50 to 700. Below it is a rich text editor with various formatting options. The 'Supporting Information (unlimited)' section is also visible at the bottom.






### Formatting TIP


Avoid the use of **hard returns** when entering narrative text. Using hard returns prevents normal text “wrap” and hinders publication.

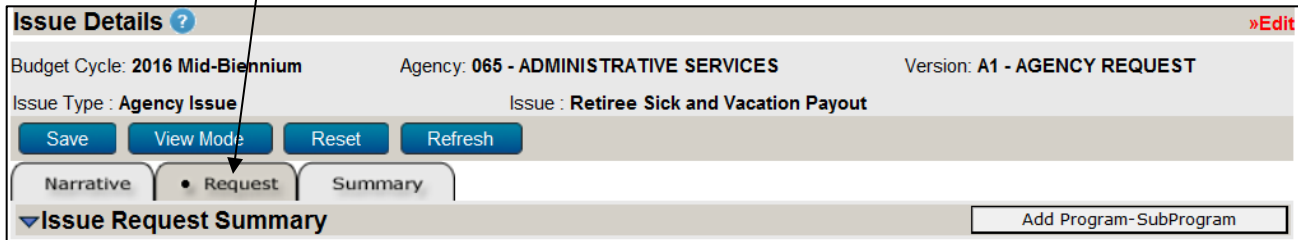
# Mid-Biennium Budget Adjustment Issue Details Instructions

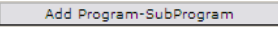
- The edit window **button bar** has standard word processing features. If any of the buttons look unfamiliar, point the mouse over the icon for a description of that feature. The  (i.e., **Maximize the Editor Size**) button toggles from full-screen editor mode to the normal screen.



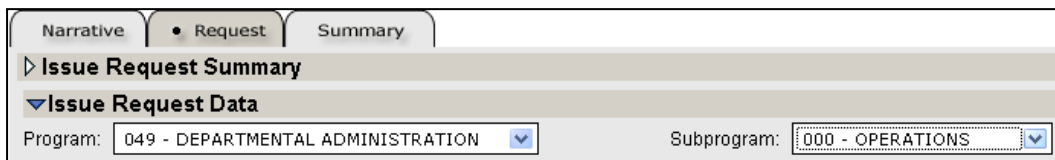
- Copy & Paste** text into the edit windows using either Ctrl-C and Ctrl-V features, or by using the   buttons on the left side of the edit window's button bar. To provide consistent formatting, a standard font style and size will be applied upon clicking .
- Attach supporting files** (e.g., organizational chart graphics, picture files, etc.) by clicking the  button to locate the desired file and then clicking the  button. All attachments will be available when the deficit request is published. Attachments should not be referenced in the limited *Information for Publication* edit window as the attachments will not be included with all reports.


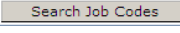
- Click  to commit the narrative entered to the database.
- Select the issue's **Request** tab to provide detailed financial information for the issue by Job Code, Object Code and Fund Type at the subprogram level.

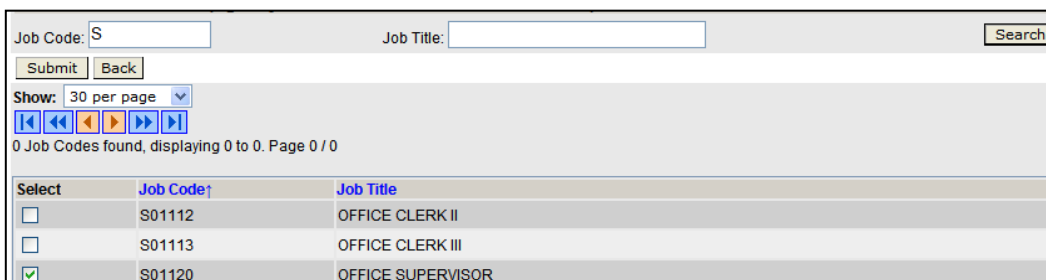


- Begin adding **Issue Detail** (Program / Subprogram combinations) to the Issue:
  - Click  to add a Program / Subprogram to the Issue Detail.
  - You may add as many Program / Subprogram combinations as are needed.
  - Click on the Program / Subprogram link to load a specific Program / Subprogram combination.

- Select a **Program** and **Subprogram** to add job code, object code, and funding detail for that subprogram.



- To add Job Codes, either enter a known Job Code and click the  button; or click the  button to search by Job Code or Job Title.
  - On the search screen, the **Job Code** field will search for codes that begin with what is entered while the **Job Title** field will search for the characters entered anywhere in the Title. Click on **Search** button.



# Mid-Biennium Budget Adjustment Issue Details Instructions

- You may select multiple Job Codes from the search results. Click **Submit** to return to the previous screen with the selected Job Code(s).
- Click **Reset** to clear the criteria entered.

**Time-Saver TIP #1**  
To copy all data from a previously created Issue Program/Subprogram combination, select the Program/Subprogram to copy and click on **Copy »** button.

**Caution:** This will overwrite all data for both fiscal years.

- Click **Back** to return to the previous screen without returning a Job Code.
- Job Codes that are no longer necessary can be deleted by clicking the button.

9. Enter FTE and Salary request amounts for the Job Code(s) added for the currently selected subprogram. Amounts entered are relative to the current appropriation and salary limit for the fiscal year (i.e. the amount requested for the appropriation to be changed).

- Note that negative numbers may be entered.
- If an FTE amount is entered, then a Salary amount is required.
- Note that common salary-related Object Codes are added automatically if a Job Code is added.

10. Click **Save** to commit the data entered to the database. The salary totals for each fiscal year will automatically be inserted into the 511100 Object Code.


11. To add Object Codes, either enter a known **Object Code** and click the **Add** button; or click the **Search Object Codes** button to search by Job Code or Job Title.

- On the search screen, the **Object Code** field will search for codes that begin with what is entered while the **Object Description** field will search for the characters entered anywhere in the description. Click on **Search**.
- Use the Major Account drop-down to limit the search results.
- You may select multiple Object Codes from the search results. Click **Submit** to return to the previous screen with the selected Object Code(s).

- Click **Reset** to clear the criteria entered.
- Click **Back** to return to the previous screen without returning an Object Code.

**CAUTION:** You must click **Save** whenever exiting a screen or risk losing unsaved data. Save frequently to avoid data loss.

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- Object Codes that are not needed can be deleted by clicking the  button.

▼ Object Codes				
Object Code:	<input type="text"/>	Add	Search Object Codes <input type="text"/>	
Object Code	Description	FY16 Request	FY17 Request	Delete
511100	PERMANENT SALARIES-WAGES	<input type="text" value="0"/>	<input type="text" value="24,000"/>	
515100	RETIREMENT PLANS EXPENSE	<input type="text"/>	<input type="text" value="1,500"/>	
515200	FICA EXPENSE	<input type="text"/>	<input type="text" value="1,600"/>	
515400	LIFE & ACCIDENT INS EXP	<input type="text"/>	<input type="text"/>	
515500	HEALTH INSURANCE EXPENSE	<input type="text"/>	<input type="text" value="12,550"/>	
516300	EMPLOYEE ASSISTANCE PRO	<input type="text"/>	<input type="text"/>	
Totals		<input type="text" value="\$0"/>	<input type="text" value="\$39,650"/>	

- Enter request amounts in the Object Code(s) added for the currently selected subprogram. Amounts entered are relative to the current appropriation for the fiscal year (i.e. the amount requested for the appropriation to be changed).
  - Note that negative numbers may be entered to indicate a reduction in the current appropriation.
  - Note that you may not delete the Object Code 511100. This Object Code will appear as long as Job Code(s) are shown under the Permanent Salaries section.
- Click  to commit the data entered to the database.
- Enter **Funding** amounts for each fiscal year of the request.
  - Funding amounts must be entered separately for Operations and Government Aid.
    - The total of the funding amounts entered must balance with the total of the amounts entered by Object Code.
    - The system requires that Operations and Government Aid object totals and funding all balance before the budget request can be submitted.
  - There are five Fund Types: General Fund, Cash Fund, Federal Fund, Revolving Fund, and Other Fund.

▼ Funding		Enter Data In Percentages <input type="checkbox"/> <input type="button" value="Change"/>			
<b>Operations Funding</b>					
Fund Type	Total	FY16 %	FY16 Funding	FY17 %	FY17 Funding
General Fund	<input type="text" value="\$18,000"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="45.40"/>	<input type="text" value="18,000"/>
Cash Fund	<input type="text" value="\$21,650"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="54.60"/>	<input type="text" value="21,650"/>
Federal Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Revolving Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total Operations Funding</b>	<input type="text" value="\$39,650"/>	<input type="text" value="0.00"/>	<input type="text" value="\$0"/>	<input type="text" value="100.00"/>	<input type="text" value="\$39,650"/>
<b>Government Aid Funding</b>					
Fund Type	Total	FY16 %	FY16 Funding	FY17 %	FY17 Funding
General Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cash Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Federal Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Revolving Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Other Fund	<input type="text" value="\$0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Total Aid Funding</b>	<input type="text" value="\$0"/>	<input type="text" value="0.00"/>	<input type="text" value="\$0"/>	<input type="text" value="0.00"/>	<input type="text" value="\$0"/>
<b>Total Funding</b>					
Fund Type	Total	FY16 %	FY16 Funding	FY17 %	FY17 Funding
General Fund	<input type="text" value="\$18,000"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="45.40"/>	<input type="text" value="18,000"/>
Cash Fund	<input type="text" value="\$21,650"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="54.60"/>	<input type="text" value="21,650"/>
Federal Fund	<input type="text" value="\$0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Revolving Fund	<input type="text" value="\$0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Other Fund	<input type="text" value="\$0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
<b>Total</b>	<input type="text" value="\$39,650"/>	<input type="text" value="0.00"/>	<input type="text" value="\$0"/>	<input type="text" value="100.00"/>	<input type="text" value="\$39,650"/>
PSL Request	<input type="text" value="\$24,000"/>		<input type="text" value="\$0"/>		<input type="text" value="\$24,000"/>

# Mid-Biennium Budget Adjustment Issue Details Instructions

- Funding may be entered by two methods, *Whole Dollar* or *Percentage*.
  - To change methods, check the box to enter data in percentages then click .
  - Un-checking the box returns the system to the *Whole Dollar* entry method.
- i. *Whole Dollar* method
  - Enter amounts, by fund type.
  - Be sure to determine the amounts to be entered for Operations and Government Aid.
  - System will calculate totals and variance when  or  are clicked.
  - **NOTE:** System will only save data in dollar amounts, not the percentages.
- ii. *Percentage* Method
  - Enter percentage amount, by fund type.
  - If you enter amounts exceeding 100%, you will need to resolve the variance.
  - The system will calculate, based upon the respective object codes, the dollar amounts to be entered for both the Operations and Government Aid funding sections.
  - Upon  or , the system will calculate a dollar amount based upon the percentage. You may need to correct the effect of rounding using the *Whole Dollar* method
  - **NOTE:** System will only save data in dollar amounts, not the percentages.

15. Click  to commit the data entered to the database and check for Variances.
- Variances do not need to be resolved in order to save. However all Variances must be resolved before your budget request can be submitted.

Variance	Total	FY16	FY17
Total Request	\$39,650	0	39,650
Total Funding	\$29,650	0	29,650
Variance	\$10,000	0	10,000

- The system will calculate the variance for the total in each fiscal year. Any variance will be highlighted with red shading.
- Use of the Percentage funding method may produce a variance due to rounding. To correct, use the *Whole Dollar* method.

16. Click  to exit Edit Mode. While in View Mode you may switch to a different Issue to continue entering your budget request or change to a different screen from the left-margin menu.

**NOTE:** The Issue's **Summary** tab displays the Funding data in summary fashion, by year. No data entry is required on this screen.

# Mid-Biennium Budget Adjustment Issue Details Instructions

## Edit an Existing Issue

1. Select the desired **Issue Type** (this filters the Issue drop-down) and then select the **Issue** you wish to edit from the Issue drop-down menu. Click **Edit** to begin editing the issue.
  - Select the **Narrative**, **Request** or **Summary** tab as needed.
  - To load the request financial data for a specific Program / Subprogram combination which was previously entered, click the "program link" under the Program column in the **Issue Request Summary** section of the issue's **Request** tab.

**Issue Details** »View Only

Budget Cycle: 2016 Mid-Biennium Agency: 065 - ADMINISTRATIVE SERVICES Version: A1 - AGENCY REQUEST


Issue Type: Agency Issue Issue: Retiree Sick and Vacation Payout

**Edit** **Delete**

Narrative • **Request** Summary

**Issue Request Summary**

Program↑	Subprogram	FY16 Request	FY17 Request
<a href="#">049 - DEPARTMENTAL ADMINISTRATION</a>	000 - OPERATIONS	\$24,000	\$25,600
<a href="#">509 - BUDGET DIVISION</a>	001 - OPERATIONS	\$35,900	\$39,250
	Total	\$59,900	\$64,850

- The currently selected Issue may be deleted by clicking the **Delete** button while the screen is in View Mode (also see the Issues Summary screen).
- You may delete a Program / Subprogram combination from the Issue in the **Issue Request Summary** section by clicking the  button while in Edit Mode.
- Follow steps 3-16 under Create a New Issue from above to edit an existing Issue.

# Mid-Biennium Budget Adjustment Issue Details Instructions

## Mid-Biennium Budget Adjustment Issue Details– Narrative Content

The mid-biennium budget adjustment process provides for the Governor to make recommendations to the Legislature as to the mid-biennium funding requirements of the various agencies, boards, and commissions of State government. A Mid-Biennium Budget Adjustment Issue narrative should document a general description of the request, the rationale behind the request, the impact of the request and any statutory change that would be needed to implement the mid-biennium adjustment.

**Description of Request** – A brief description of the mid-biennium budget adjustment including the relationship of the Issue to accomplishment of agency goals and program objectives. Identify how the request relates to or affects the operational performance metrics identified for the affected program(s).

**Rational for Request** – Provide the reason why a change to appropriations would be warranted and, in the case of a funding deficiency, any steps taken by the agency to diminish the impact of the deficit.

**Impact of Request** – The agency should identify the quantitative and qualitative impacts, including:

- a. What services would be continued, adjusted or expanded?
- b. What client groups would be impacted?
- c. How will client groups be affected?
- d. If applicable, what would happen if deficit funding is not provided?

**Statutory Changes (if Required)** – The agency should provide suggested bill language for statutory changes that may be required to implement the request or in the case of a funding deficiency, statutory changes that would be required if the request is not funded.