



# **BUDGET DEVELOPMENT**

## **REQUEST AND PERFORMANCE MEASURE ENTRY**

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# **PBCS USER MANUAL**

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## Introduction to PBCS

Budget amendments will be submitted electronically using the on-line Planning and Budget Cloud Services application. PBCS will be the official record of budget information for all state agencies and programs for FY 2018 and beyond.

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### REQUESTING PBCS ACCESS

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Those needing access to PBCS should complete a user access request form on OPB's website. OPB must also have a "Request for Access" on file for each individual agency user.

To add a user, agencies should:

1. Go to the OPB website at [opb.georgia.gov](http://opb.georgia.gov).
2. Under the **Apps and Resources** menu, click on **OPB Applications**.
3. Under the header **OPB Applications**, there is a link for the user access request form. Click the link to download the form.
4. Print and complete the form for new users and user updates.
5. Fax form(s) to 404-656-7916.
6. Users will receive an email from Oracle when their login information has been established.

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### SYSTEM OVERVIEW AND LOGGING IN

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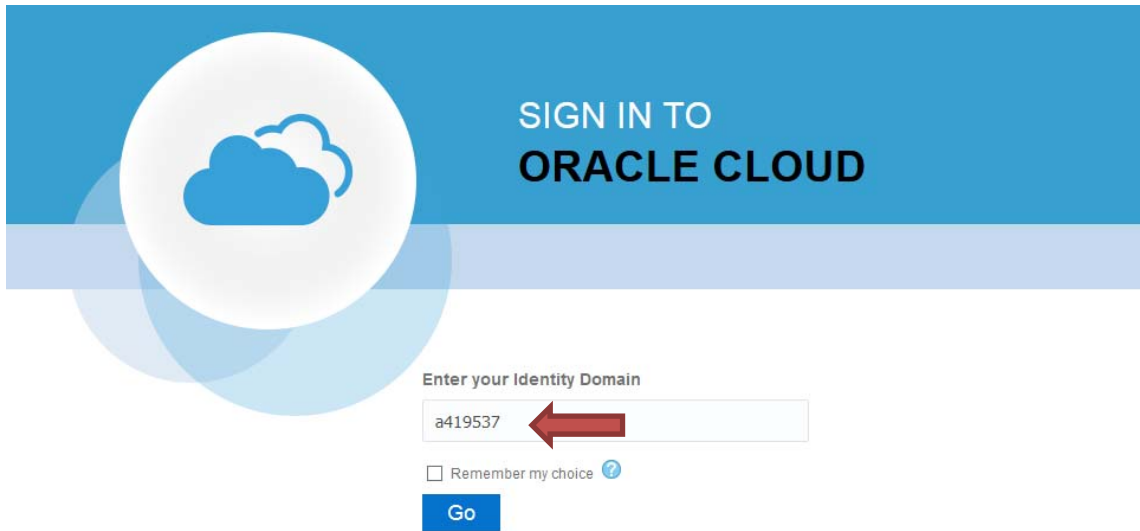
PBCS is designed to work at the lowest point of entry. All budget data must be entered in the fund source and object class schedules at the subprogram level. While the system will work in any web browser, performance is most stable using Mozilla Firefox as the default browser for the application.

#### Logging In

1. Go to [opb.georgia.gov](http://opb.georgia.gov).
2. Click on **PBCS** link under Applications on the right side of the screen.



3. On the page titled **Sign In to Oracle Cloud**, enter **a419537** in the box under **Enter your Identity Domain**.



**SIGN IN TO ORACLE CLOUD**

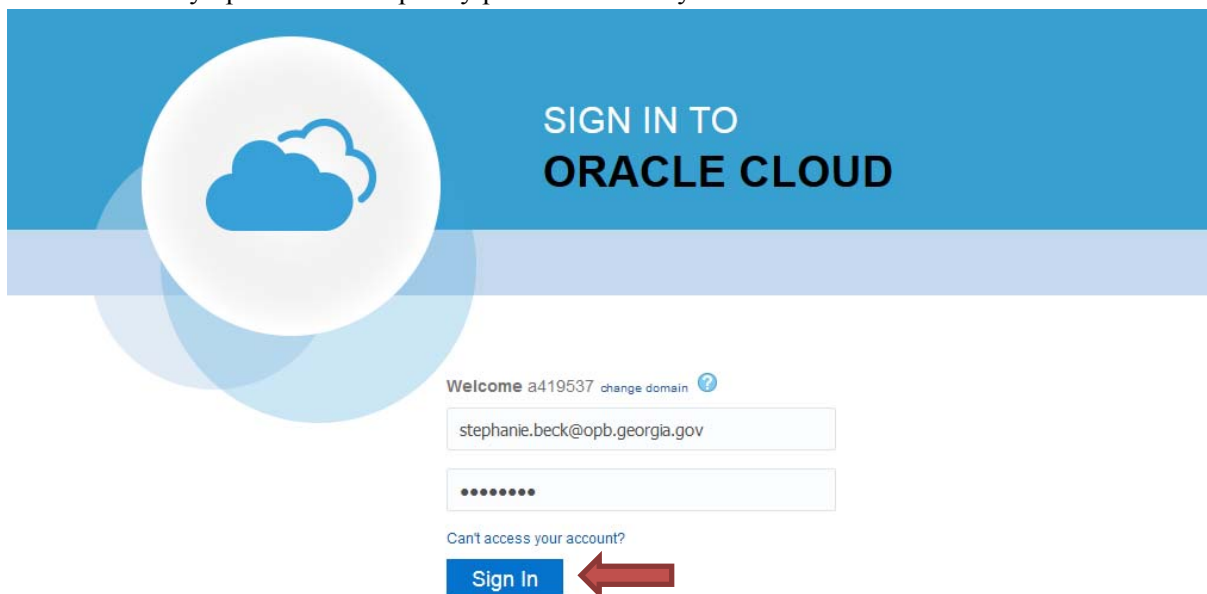
Enter your Identity Domain

a419537

☐ Remember my choice

Go

4. Click on **Go** below the entry box. You may click on the box next to **Remember my choice** to automatically fill in the Identity Domain for future log-ins.
5. Enter your “User ID” and password. Users should have received a User ID from Oracle and should have already updated the temporary password initially included from Oracle.



**SIGN IN TO ORACLE CLOUD**

Welcome a419537 change domain

stephanie.beck@opb.georgia.gov

.....

Can't access your account?

Sign In

6. Click on **Sign In** or press **ENTER** on keyboard.

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## ACCESSING BUDGET DEVELOPMENT TASKS

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After log-in, the PBCS homepage appears. This screen provides access to budget tasks and reports.

To enter access budget development processes in the system:

1. Click on the green Tasks button.



2. The main task list screen will appear. Click the drop down triangle to the right of Tasks: All Task Lists.

**Tasks: All Task Lists** ▼

3. Click on Budget Development – 1) Agency Request Entry on the menu that appears under All Task Lists.



4. The budget development process consists of selecting a cutoff amendment to serve as the base budget for both the amended and general budget requests, entering requested changes, entering performance measures for each budgetary program, and submitting both budget change items and performance measures.



## SELECTING A CUTOFF AMENDMENT

- From the Budget Development – 1) Agency Request Entry task list menu, select the first option, **Cut-off Amendment Selection**.

Tasks: Budget Development - 1) Agency Request Entry

8 All | 8 Incomplete | 0 Today | 0 Week | 8 Future

Type	Name
	Cut-Off Amendment Selection
	Review Base Budget

- On the Cutoff Amendment Selection screen, first select the agency for which you are establishing a base budget. For agencies with no attached agencies, the system should default to your agency. For agencies with attached agencies, you will need to establish a cutoff amendment for **EACH** attached agency as well as the parent agency.

Click the pencil icon on the right hand side of the Cutoff Amendment Selection screen.

Cut-Off Amendment Selection

Save Refresh Actions

Parent Input	Version	Agency	Years	Budget_Amendm	Budget_Amendm	Budget_Amendm	Selected Cutoff Amendment
				Amendment1	Amendment2	Total_Amendm	Current Budget
Cut-Off Amendment Information							
State Funds		3,065,876,528				3,065,876,528	
Federal Funds Group		7,615,227,599		25,000		25,000	7,615,252,599
Other Funds Group		4,956,522,309			100,000	100,000	4,956,622,309
Federal Recovery Funds							
Prior Year Funds							
Amendment Type		POF - Federal Other Funds		POF - Federal Other Funds			

Click the drop down arrow next to the agency field to show all agencies available. Click on the agency for which you are establishing a base budget. Click **Apply**.

Agency 419-Community Health, Department of

Years 419-Community Health, Department of

953-Georgia Board for Physician Workforce

221-Georgia Composite Medical Board

301-Georgia Drugs and Narcotics Agency

419-Community Health, Department of

Apply Cancel

- After selecting the desired agency, the screen will display the AOB along with any approved amendments for that entity for the fiscal year to date.

Cut-Off Amendment Selection						
Period Input	Version AOB_Amendment Final	Agency 419-Community Health, Department of	Years FY 2018			
	Budget_Amendme	Budget_Amendment			Budget_Amendme	Selected CutOff Amendment
	Annual Operating Budget	Amendment1	Amendment2	Total_Amendment	Current Budget	--
Cutoff-Amendment Information						
State Funds	3,065,876,528				3,065,876,528	
Federal Funds Group	7,615,227,599	25,000		25,000	7,615,252,599	
Other Funds Group	4,056,522,309		100,000	100,000	4,056,622,309	
Federal Recovery Funds						
Prior Year Funds						
Amendment Type		FOF - Federal Other Funds	FOF - Federal Other Funds			

- To select a cutoff amendment, mouse over the column of the desired amendment and right click. This will bring up a popup menu. Click the first option on the menu, **Select Cutoff Amendment**.

Cut-Off Amendment Selection						
Period Input	Version AOB_Amendment Final	Agency 419-Community Health, Department of	Years FY 2018			
	Budget_Amendme	Budget_Amendment			Budget_Amendme	Selected CutOff Amendment
	Annual Operating Budget	Amendment1	Amendment2	Total_Amendment	Current Budget	--
Cutoff-Amendment Information						
State Funds	3,065,876,528				3,065,876,528	
Federal Funds Group	7,615,227,599	25,000		25,000	7,615,252,599	
Other Funds Group	4,056,522,309		100,000	100,000	4,056,622,309	
Federal Recovery Funds						
Prior Year Funds						
Amendment Type		FOF - Federal Other Funds	FOF - Federal Other Funds			

- After selecting the cutoff amendment column, the system will calculate the base budget.

BMgmt\_CutOff Amendment in Progress...

- After the system has calculated the base budget. The far right column, Selected Cutoff Amendment,

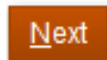
will reflect the new base total.

**Cut-Off Amendment Selection** ⓘ

Period Input	Version AOB_Amendment Final	Agency 419-Community Health, Department of	Years FY 2018			
	Budget_Amendment	Budget_Amendment			Budget_Amendment	Selected CutOff Amendment
	Annual Operating Budget	Amendment1	Amendment2	Total_Amendment	Current Budget	--
Cutoff-Amendment Information					Amendment 1	
State Funds	3,065,876,528				3,065,876,528	3,065,876,528
Federal Funds Group	7,615,227,599	25,000		25,000	7,615,252,599	7,615,252,599
Other Funds Group	4,056,522,309		100,000	100,000	4,056,622,309	4,056,522,309
Federal Recovery Funds						
Prior Year Funds						
Amendment Type		FOF - Federal Other Funds	FOF - Federal Other Funds			

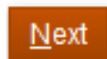
7. Validate that the Selected Cutoff Amendment column accurately reflects the totals for the AOB plus any amendment changes made through the chosen cutoff amendment.

8. Click the Next button at the top right of the Cutoff Amendment Selection screen.



9. The Review Base Budget screen will show the budget by subprogram and fund source as selected on the previous screen. Agencies should validate these amount against the amendment totals in the Final Approved Amendment task.

10. Click the Next button at the top right of the Review Base Budget screen.



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## ENTER BUDGET REQUEST ITEMS

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1. To enter requested change items for budgetary programs, either click the Next button from the Review Base Budget screen as reflected above, or you can select the Enter Program Changes task directly from the Budget Development – 1) Agency Request Entry task menu.

**Tasks: Budget Development - 1) Agency Request Entry**

Type	Name
	Cut-Off Amendment Selection
	Review Base Budget
	<b>Enter Program Changes</b>
	Review Program Changes
	Submit All Changes

2. Budget changes will be entered program by program. From the Enter Program Changes screen, click the pencil icon to select a program to begin entering request items.

**Enter Program Changes**

Request	Request Caption Input	No_Account	Total Object Class	
Request1				
Request2				
Request3				
Request4				
Request5				
Request6				

From the menu that appears, click the drop down arrow next to program to select the desired program. Click apply.

**Program Selection Menu**

Agency: 419-Community Health, Department of

Program: No\_Program

Years: Select Member

Scenario: No\_Program

- 1073200-Departmental Administration (DCH)
- 1073400-Georgia Board of Dentistry
- 1073300-Georgia State Board of Pharmacy
- 1070200-Health Care Access and Improvement
- 1073100-Healthcare Facility Regulation**
- 1070300-Indigent Care Trust Fund
- 1070400-Medicaid- Aged Blind and Disabled
- 1070500-Medicaid- Low-Income Medicaid
- 1070600-PeachCare
- 1070800-State Health Benefit Plan



- After clicking apply, you will now see your selected program in the point of view bar on the top left.

### Enter Program Changes ?

Period Input	Version	Agency	Program	Years	Scenario
Agency Working	419-PROD	419-Community Health, Department of	1073100-Healthcare Facility Regulation		Budget

	Request Caption Input	No_Account	Total Object Class
Request1			
Request2			
Request3			
Request4			
Request5			

- To enter a change request, click on the first line that says Request1. You may then either right click or click on the actions menu in the top right. From the menu that appears, click on **Edit Unique Change**.

An **Enter Program Changes** screen will appear for you to enter the details of the change item.

### Enter Program Changes ?

5\_Review Unique Changes > 6\_UN\_Edit Change

Scenario	Agency	Version	Program	Years
Budget	419-Community Health, Department of Agency Working	419-PROD	1073100-Healthcare Facility Regulation	FY 2019

**Manage Unique Changes**

Requests	Input	Total by Fund	Total by Object
Request1			

**UN\_Change Expenses by Fund** | UN\_Change Expenses by Obj Class | 6d\_UN\_Counts

Period Input	No_FundCode	FundCode_Num	Purpose/Descr	Base Budget No_Account	Request1 No_Account	
1073101-Direction and Program Support	State General Funds			898,809		
	99.999 - Federal Funds Not Itemized					
		FundCode_1	11417	Clinical Laboratory	69,824	
		FundCode_2	29406	Mammography Inspections	39,647	
		FundCode_3	13148	Medicare Title XVIII	1,534,663	
93.778 - Medical Assistance Program	FundCode_1	12157	Medicaid Title XIX	1,313,906		

- Click in the field next to **Request Caption Input**. Type a sentence or title describing the change item to be requested. Ex. “Increase funds for 3 information technology positions and operating expenses.” Or “Reduce one-time funds for information technology equipment.”


## Enter Program Changes

5\_Review Unique Changes > 6\_UN\_Edit Change


Scenario	Agency	Version	Program	Yr
Budget	419-Community Health, Department of	Agency Working	1073100-Healthcare Facility Regulation	F

**Manage Unique Changes**

Requests	
Request1	

	Input
Request Caption Input	Increase funds for three information technology positions and associated operating expenses. 
Request Change Type	
Counties	
Request Comments	

- Next, click in the field next to **Request Change Type** to bring up a drop down menu. Click on the category of change for the current request item. If you are unsure as to which change type to select for a particular item, please refer to the budget development instructions or contact your OPB analyst.


	Input
Request Caption Input	Increase funds for three information technology positions and associated
Request Change Type	
Counties	
Request Comments	

**Entries**

Search

**Name**

Workload Adjustment

Other Adjustments 

% Reduction

Redistribution

One Time Delete

<b>UN_Change Expenses by Fund</b>	UN_Change Expenses by Obj C
Period	
Input	
1073101-Direction and Program Support	State General Funds

- In the **Counties** field, click the field to bring up a drop down box listing all counties in the state.

If the requested budget change item will impact a specific county, select it from the dropdown box by either scrolling through the counties alphabetically or typing it in the search field. If no particular county will be directly impacted by the budget item or if it impacts multiple counties, select either Various or Statewide at the bottom of the list.

Input	
Request Caption Input	Increase funds for three information technology positions and associated
Request Change Type	Other Adjustments
Counties	
Request Comments	

Entries

Search

Name

- Wilkes County
- Wilkinson County
- Worth County
- Various
- Statewide

UN\_Change Expenses by Fund UN\_Change Expenses by Obj C

Period Input

1073101-Direction and Program Support

State General Funds  
99.999 - Federal

- Click in the **Request Comments** field, enter any additional supporting information regarding the need for the requested item. The field will hold up to 2000 characters, so it may be helpful to type information in Microsoft Word or Notepad and copy and paste into the field for longer explanations.

## Enter Program Changes i

[5\\_Review Unique Changes](#) > [6\\_UN\\_Edit Change](#)

Scenario	Agency	Version	Program
Budget	419-Community Health, Department of	Agency Working	1073100-Heal

**Manage Unique Changes**

Requests  
Request1

Input	
Request Caption Input	Increase funds for three information technology positions and associated
Request Change Type	Other Adjustments
Counties	Statewide
Request Comments	These positions will support the ongoing implementation of an enterprise health information technology system. The

Row Input

- Click **Save** in the upper right corner. Fields that are colored yellow reflect information that has not yet been saved. After clicking save, these field will turn white to reflect the information has been recorded in the database.

Save
Actions ▼
☐ Complete
Previous
Next
Close

10. After entering descriptive information in the upper grid, you will enter financial information at the subprogram level in the lower grid. There are three tabs for entering financial information, Changes by Fund, Changes by Object Class, and Position/Motor Vehicle Count Changes.

Change amounts must balance by fund source and object class at the subprogram level. i.e. A \$100 increase in a fund source must have a corresponding \$100 increase on the object class schedule of the same subprogram.

UN_Change Expenses by Fund				UN_Change Expenses by Obj Class		6d_UN_Counts	
Period Input							
1073101-Direction and Program Support	State General Funds	99.999 - Federal Funds Not Itemized	No_FundCode			898,809	
			FundCode_1	11417	Clinical Laboratory	69,824	
			FundCode_2	29406	Mammography Inspections	39,647	
			FundCode_3	13148	Medicare Title XVIII	1,534,663	
	93.778 - Medical Assistance Program		FundCode_1	12157	Medicaid Title XIX	1,313,906	

11. On the Change Expenses by Fund tab, any subprograms for the selected program are listed vertically in the first column of the schedule. The second column will reflect the fund sources currently in the base for each subprogram at the lowest level of detail entered in the cutoff amendment. The next four columns will reflect additional detail information for individual specific fund sources, including the TeamWorks Fund Source number, a description of the fund source as included in the base budget, and the amount of the fund source included in the base.

UN_Change Expenses by Fund				UN_Change Expenses by Obj Class		6d_UN_Counts	
Period Input							
1073101-Direction and Program Support	State General Funds	99.999 - Federal Funds Not Itemized	No_FundCode			898,809	
			FundCode_1	11417	Clinical Laboratory	69,824	
			FundCode_2	29406	Mammography Inspections	39,647	
			FundCode_3	13148	Medicare Title XVIII	1,534,663	
	93.778 - Medical Assistance Program		FundCode_1	12157	Medicaid Title XIX	1,313,906	

Changes to fund sources should be entered for each impacted subprogram under the column labeled Request. Click on the white box next to the fund source you wish to use. Enter the amount desired. You may enter amounts in as many fields as necessary.

UN_Change Expenses by Fund						
UN_Change Expenses by Obj Class						
6d_UN_Counts						
Period Input						
			Base Budget		Base Budget	Request1
			FundCode_Nur	Purpose/Descri	No_Account	No_Account
1073103-Health Planning		FundCode_2	29406	Mammograp hy	528,229	
		FundCode_3	13148	Medicare Title XVIII	3,353,831	
		FundCode_1	12157	Medicaid Title XIX	4,729,693	
	93.778 - Medical Assistance Program	FundCode_1				
	State General Funds	No_FundCode			1,188,152	250,000
	01 - Agency Funds	FundCode_1	90060		100,000	15,000

12. Note, only fund sources that were included in the base budget will show in the Change Expenses by Fund schedule. If a fund source is needed that was not included in the base budget, the user can add a new row to include it.

Right click in the Request column in the same row as the subprogram, and if possible, fund source group or specific fund source you wish to add a row to. For example, if you are adding a federal fund source, click on a row that already contains a federal fund source if possible. From the pop-up menu that appears, click **Add Amount**.

### Enter Program Changes

5\_Review Unique Changes > 6\_UN\_Edit Change

Scenario Budget Agency 419-Community Health, Department of Version Agency Working 1073

Manage Unique Changes

UN\_Change Expenses by Fund UN\_Change Expenses by Obj

Period Input

1073101-Direction and Program Support	State General Funds	99.999 - Federal Funds Not Itemized	FundCode_1	11417	Clinical Laboratory	69,824	
			FundCode_2	29406	Mammograp hy	39,647	
			FundCode_3	13148	Medicare Title XVIII	1,534,663	
	93.778 - Medical Assistance Program	FundCode_1	12157	Medicaid Title XIX	1,313,906		
	State General Funds	No_FundCode				11,207,571	
1073102-Healthcare Licensing	99.999 - Federal Funds Not Itemized		FundCode_1	11417	Clinical Laboratory	403,459	
			FundCode_2	29406	Mammograp hy	528,229	
			FundCode_3	13148	Medicare Title XVIII	3,353,831	
	93.778 - Medical Assistance Program	FundCode_1	12157	Medicaid Title XIX	4,729,693		

In this example, we are adding a fund source to the Direction and Program Support subprogram and have selected to add a new Not Itemized federal fund.

Add Amount

Edit

Adjust

Comments

Supporting Detail

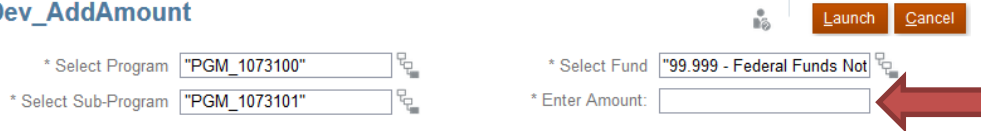
Change History


Attachments


Lock/Unlock Cells


An Add Amount menu will appear. It will automatically reflect the program and subprogram as well as the fund source that you clicked on in the Change Expenses by Fund schedule.

## BDev\_AddAmount



\* Select Program "PGM\_1073100" 

\* Select Sub-Program "PGM\_1073101" 

\* Select Fund "99.999 - Federal Funds Not Itemized" 

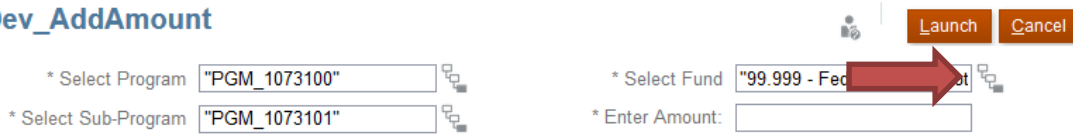
\* Enter Amount:


Launch Cancel


If adding a **new detail row** to the fund source shown next to Select Fund, you can enter the amount desired in the Enter Amount field and click Launch. The system will automatically add a new line to that fund source.


If you need to select a **new federal or other fund** not previously used in that subprogram, click the tree icon next to Select Fund.

## BDev\_AddAmount



\* Select Program "PGM\_1073100" 

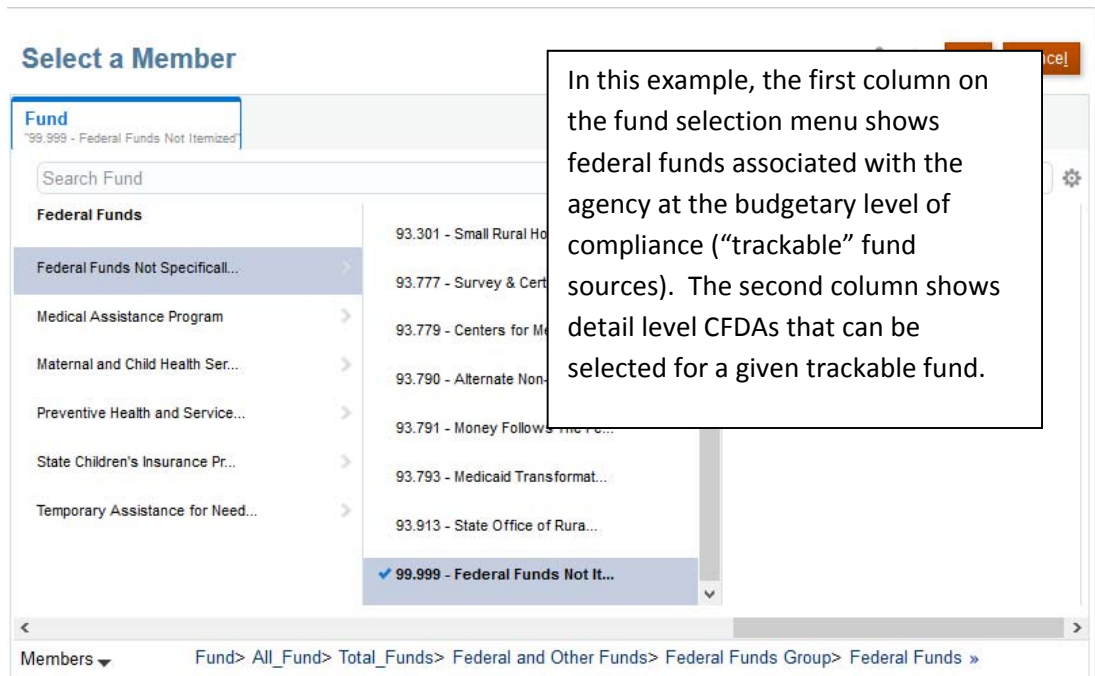
\* Select Sub-Program "PGM\_1073101" 

\* Select Fund "99.999 - Federal Funds Not Itemized" 

\* Enter Amount:

Launch Cancel

Clicking the tree icon will open a fund selection menu. The menu will default to the fund source group you originally clicked on in the Change Expenses by Fund schedule on the Enter Program Changes screen. i.e. If you clicked on a row containing a federal fund source, the fund selection menu will show other available federal funds. If you clicked on an other fund, the menu will reflect additional other funds to choose from.



**Select a Member**

Fund  
"99.999 - Federal Funds Not Itemized"

Search Fund

**Federal Funds**

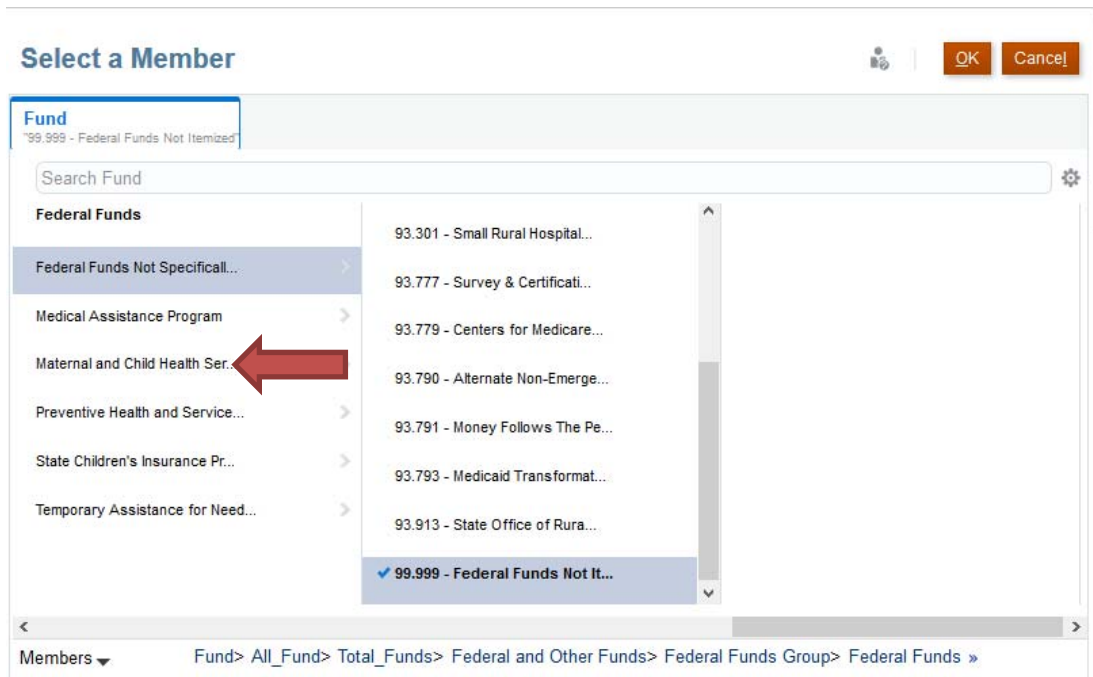
Fund	CFDA
Federal Funds Not Specificall...	93.301 - Small Rural Ho
Medical Assistance Program	93.777 - Survey & Cert
Maternal and Child Health Ser...	93.779 - Centers for M
Preventive Health and Service...	93.790 - Alternate Non-
State Children's Insurance Pr...	93.791 - Money Follows the P...
Temporary Assistance for Need...	93.793 - Medicaid Transformat...
	93.913 - State Office of Rura...
	✓ 99.999 - Federal Funds Not It...

Members Fund> All\_Fund> Total\_Funds> Federal and Other Funds> Federal Funds Group> Federal Funds »

In this example, the first column on the fund selection menu shows federal funds associated with the agency at the budgetary level of compliance ("trackable" fund sources). The second column shows detail level CFDA codes that can be selected for a given trackable fund.

The system will show a blue check mark highlighted next to the fund source you originally clicked on in the Change Expenses by Fund. To select a different fund source, click first on the trackable fund source you desire in the first column, and then click on the blue check mark next to the specific

CFDA or other fund desired as populated in the far right column. **You must click directly on the blue check mark to select the fund source, NOT the fund source name.**



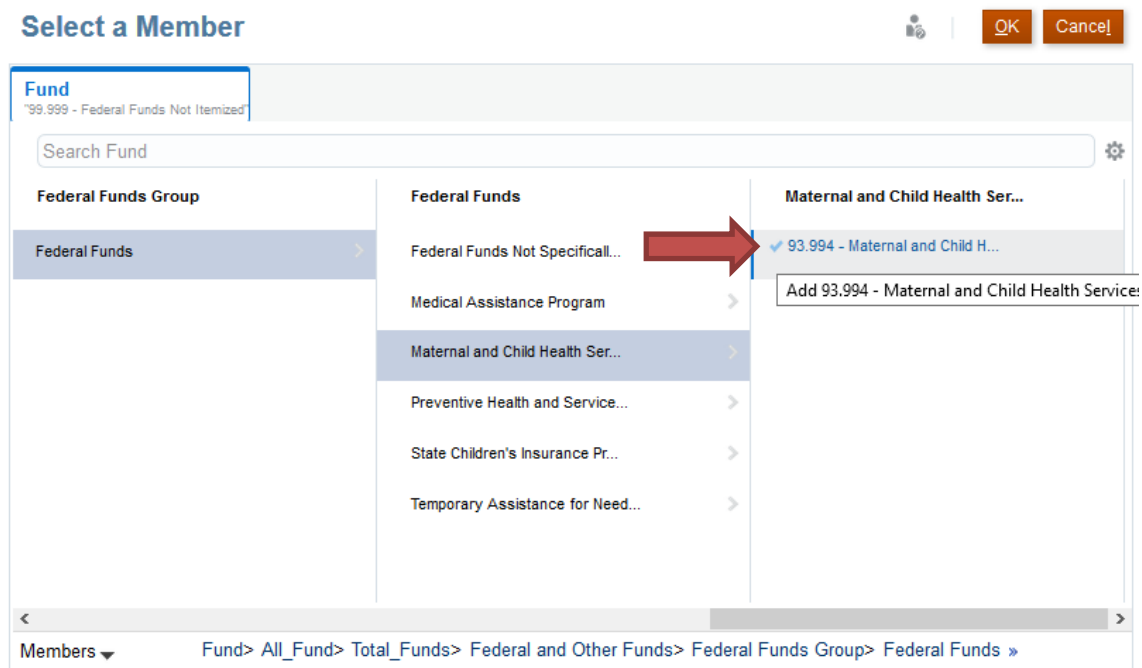
**Select a Member**

**Fund**  
\*99.999 - Federal Funds Not Itemized\*

Search Fund

Federal Funds	
Federal Funds Not Specificall...	93.301 - Small Rural Hospital...
Medical Assistance Program	93.777 - Survey & Certificati...
Maternal and Child Health Ser...	93.779 - Centers for Medicare...
Preventive Health and Service...	93.790 - Alternate Non-Emerge...
State Children's Insurance Pr...	93.791 - Money Follows The Pe...
Temporary Assistance for Need...	93.793 - Medicaid Transformat...
	93.913 - State Office of Rura...
	✓ 99.999 - Federal Funds Not It...

Members Fund> All\_Fund> Total\_Funds> Federal and Other Funds> Federal Funds Group> Federal Funds »



**Select a Member**

**Fund**  
\*99.999 - Federal Funds Not Itemized\*

Search Fund

Federal Funds Group	Federal Funds	Maternal and Child Health Ser...
Federal Funds	Federal Funds Not Specificall...	✓ 93.994 - Maternal and Child H...
	Medical Assistance Program	Add 93.994 - Maternal and Child Health Service:
	Maternal and Child Health Ser...	
	Preventive Health and Service...	
	State Children's Insurance Pr...	
	Temporary Assistance for Need...	

Members Fund> All\_Fund> Total\_Funds> Federal and Other Funds> Federal Funds Group> Federal Funds »

Click OK after highlighting the blue check mark next to the selected fund source.

The Add Amount screen will reappear. Verify that the correct program, subprogram, and fund source are reflected on the screen. Enter the desired amount in the blank field and then click Launch.

**BDev\_AddAmount**

\* Select Program:

\* Select Sub-Program:

\* Select Fund:

\* Enter Amount:

\* Enter Amount:

After clicking Launch, the system will return to the Enter Program Changes screen.

If the newly added amount does not automatically appear on the fund source schedule after clicking Launch, click Save on the Enter Program Changes screen.

☐ Complete

The new fund source and amount will appear in the Change Expenses by Fund schedule.

UN\_Change Expenses by Fund

UN\_Change Expenses by Obj Class

6d\_UN\_Counts

Period Input

			Base Budget		Base Budget	Request1	
			FundCode_Nur	Purpose/Descr	No_Account	No_Account	
1073101-Direction and Program Support	State General Funds	No_FundCode			898,809		
	99.999 - Federal Funds Not Itemized	FundCode_1	11417	Clinical Laboratory	69,824		
		FundCode_2	29406	Mammography	39,647		
		FundCode_3	13148	Medicare Title XVIII	1,534,663		
			12157	Medicaid Title XIX	1,313,906		
	93.778 - Medical Assistance Program	FundCode_1					
	93.994 - Maternal and Child Health Services Block Grant	FundCode_1				50,000	
	1073102-Healthcare Licensing	State General Funds	No_FundCode			11,207,571	
		99.999 - Federal Funds Not Itemized	FundCode_1	11417	Clinical Laboratory	403,459	
			FundCode_2	29406	Mammography	528,229	
FundCode_3			13148	Medicare Title XVIII	3,353,831		

13. To see the total entered in the Change Expenses by Fund schedule by subprogram for the change item, click save at the top right of the Enter Program Changes screen.

☐ Complete

14. In the top grid on the right hand side is a table showing the total entered for each subprogram on both the Fund Source and Object Class schedules. Click the plus sign next to Total\_SubProgram to see all associated subprograms for the selected program of the change item.

		Total by Fund	Total by Object
+ Total SubProgram		315,000	



	Total by Fund	Total by Object
1073101-Direction and Program Support	50,000	
1073102-Healthcare Licensing		
1073103-Health Planning	265,000	
<input checked="" type="checkbox"/> Total_SubProgram	315,000	

If the fund source and object class amounts do not balance, the schedule will highlight an unequal amounts in orange and the user will get a warning message on save.

- After entering fund source amounts for the requested change item, click on the tab labeled **Change Expenses by Object Class**. On the Object Class schedule, the subprograms for the program are listed vertically in the first column, any object classes that have funds associated with them in the base budget for that subprogram are listed in the second column, and the base budget for that object class is shown in the third column. Object classes with no current associated funding are not displayed.

UN_Change Expenses		UN_Change Expenses by Obj Class	6d_UN_Counts
There are no valid columns of data for this form.			
		Base Budget	Request1
1073101-Direction and Program Support	300-Personal Services	3,831,959	
	301-Regular Operating Expenses	19,137	
	304-Equipment	2,228	
	305-Computer Charges	825	
	307-Telecommunications	500	
	312-Contractual Services	2,200	
1073102-Healthcare Licensing	300-Personal Services	18,311,456	
	301-Regular Operating Expenses	1,218,194	
	304-Equipment	5,300	
	307-Telecommunications	289,220	
	312-Contractual Services	398,613	
1073103-Health Planning	300-Personal Services	1,065,027	
	301-Regular Operating Expenses	17,975	
	304-Equipment	50	
	305-Computer Charges	150	
	307-Telecommunications	500	
	312-Contractual Services	125,050	

- Enter the associated change amounts by subprogram by object class in the white blanks under the Request column. Note that amounts will appear in yellow after they are entered, indicating that the data has not yet been saved.

UN_Change Expenses by Fund		UN_Change Expenses by Obj Class	6d_UN_Counts
There are no valid columns of data for this form.			
		Base Budget	Request1
1073101-Direction and Program Support	300-Personal Services	3,831,959	40,000
	301-Regular Operating Expenses	19,137	
	304-Equipment	2,228	5,000
	305-Computer Charges	825	
	307-Telecommunications	500	5,000
	312-Contractual Services	2,200	
1073102-Healthcare Licensing	300-Personal Services	18,311,456	
	301-Regular Operating Expenses	1,218,194	
	304-Equipment	5,300	
	307-Telecommunications	289,220	
	312-Contractual Services	398,613	
1073103-Health Planning	300-Personal Services	1,065,027	175,000
	301-Regular Operating Expenses	17,975	10,000
	304-Equipment	50	
	305-Computer Charges	150	5,000
	307-Telecommunications	500	7,500
	312-Contractual Services	125,050	50,000

17. Click Save at the top right of the entry screen.



18. Clicking Save will recalculate the subprogram totals in the top right grid. Click the plus sign next to Total\_Subprogram to expand the subprogram detail and compare the amounts entered by subprogram for fund sources and object classes.

	Total by Fund	Total by Object
1073101-Direction and Program Support	50,000	50,000
1073102-Healthcare Licensing		
1073103-Health Planning	265,000	247,500
☐ Total_SubProgram	315,000	297,500

Any differences in total between Fund and Object Class will be highlighted in orange and a warning message will appear on Save.

19. If differences remain between fund sources and object classes by subprogram, return to either the Change Expenses by Fund or Change Expenses by Object Class schedule to make the necessary corrections using the same steps outlined above. After entering correcting information, click Save.

20. Validate that fund sources and object classes balance by subprogram and caption and change type are

correct for the entry.

**Enter Program Changes** ⓘ

5\_Review Unique Changes > 6\_UN\_Edit Change

Scenario	Agency	Version	Program	Years
Budget	419-Community Health, Department of	Agency Working	1073100-Healthcare Facility Regulation	FY 2019

**Manage Unique Changes**

Requests  
Request1


	Input			Total by Fund	Total by Object
Request Caption Input	Increase funds for three information technology positions and associated		1073101-Direction and Program Support	50,000	50,000
Request Change Type	Other Adjustments		1073102-Healthcare Licensing		
Counties	Statewide		1073103-Health Planning	265,000	265,000
Request Comments	These positions will support the ongoing implementation of an enterprise health		Total_SubProgram	315,000	315,000

**UN\_Change Expenses by Fund** **UN\_Change Expenses by Obj Class** **6d\_UN\_Counts**

		Base Budget	Request1
1073102-Healthcare Licensing	312-Contractual Services	2,200	
	300-Personal Services	18,311,456	
	301-Regular Operating Expenses	1,218,194	
	304-Equipment	5,300	
	307-Telecommunications	289,220	
1073103-Health Planning	312-Contractual Services	398,613	
	300-Personal Services	1,065,027	175,000
	301-Regular Operating Expenses	17,975	10,000
	304-Equipment	50	
	305-Computer Charges	150	5,000
	307-Telecommunications	500	7,500
	<b>Total</b>	<b>196,060</b>	<b>87,500</b>

21. Click the blue link labeled 5\_Review Unique Changes at the top left of the entry screen to return to the screen showing a list of all change items for the selected program.

**Enter Program Changes** ⓘ

5\_Review Unique Changes >  t Change

Scenario	Agency	Version	Program	Years
Budget	419-Community Health, Department of	Agency Working	1073100-Healthcare Facility Regulation	FY 20

**Manage Unique Changes**

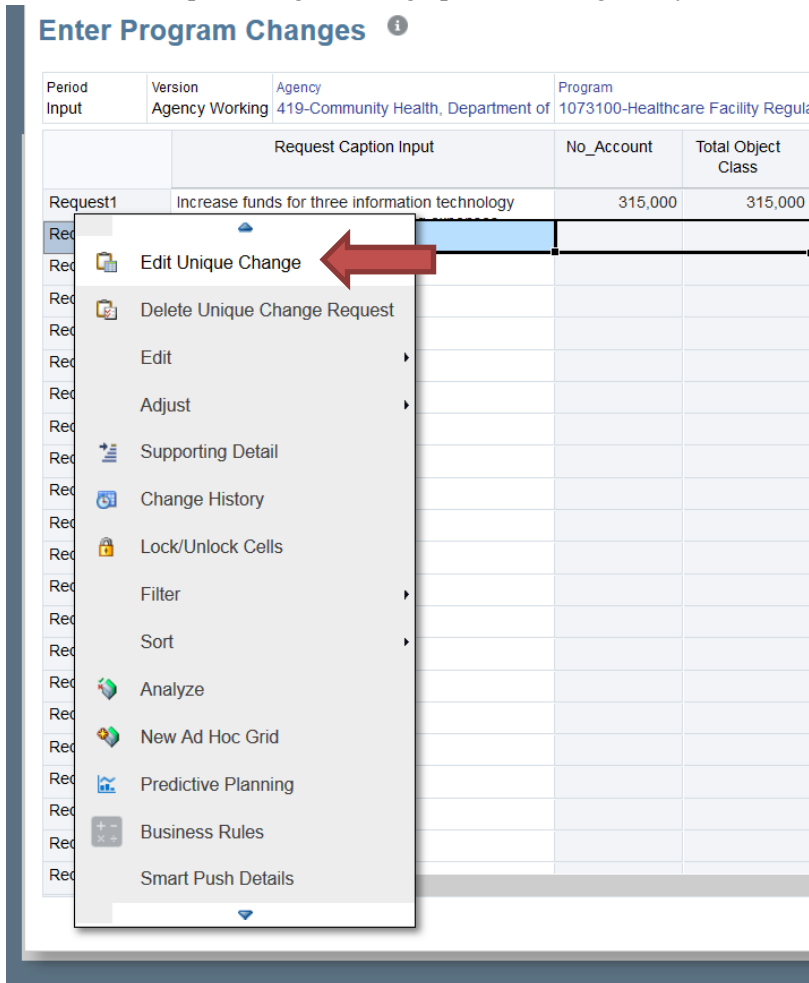
22. On returning to the Enter Program Changes screen, the user will see the change item just entered now recorded on the first Request line.

**Enter Program Changes** ⓘ

Period	Version	Agency	Program
Input	Agency Working	419-Community Health, Department of	1073100-Healthcare Facility Regulation

	Request Caption Input	No_Account	Total Object Class
Request1	Increase funds for three information technology positions and associated operating expenses	315,000	315,000
Request2			
Request3			
Request4			

23. To enter additional items in the same program, right click on the next available Request line and select Edit Unique Change to bring up a new change entry screen.



24. Repeat steps 5-23 to enter additional request items for the same program.
25. Verify that all required entry items for the program have been entered correctly.

**Enter Program Changes** ⓘ

Period Input	Version	Agency	Program
	Agency Working	419-Community Health, Department of	1073100-Healthcare Facility Regulation
	Request Caption Input	No_Account	Total Object Class
Request1	Increase funds for three information technology positions and associated operating expenses.	315,000	315,000
Request2	Transfer funds to the Departmental Administration program for an information technology contract.	(75,000)	(75,000)
Request3	Provide one-time funds for IT equipment purchases.	80,000	80,000

26. To select the next program for request entry, click the pencil icon on the top right of the Enter Program Changes screen.

The screenshot shows a web interface with a top bar containing 'Save', 'Refresh', and 'Actions' buttons. Below this is a modal form with the following fields:

- Agency: 419-Community Health, Department of
- Program: 1073100-Healthcare Facility Regulation
- Years: FY 2019
- Scenario: Budget

Buttons for 'Apply' and 'Cancel' are at the top of the modal. A red arrow points to a pencil icon in the top right corner of the main interface.

27. Click the drop down arrow next to the program field. Select the desired program from the drop down list.

The screenshot shows the modal form with the 'Program' dropdown menu open. The list of programs includes:

- Select Member
- No\_Program
- 1073200-Departmental Administration (DCH)
- 1073400-Georgia Board of Dentistry
- 1073300-Georgia State Board of Pharmacy
- 1070200-Health Care Access and Improvement
- 1073100-Healthcare Facility Regulation
- 1070300-Indigent Care Trust Fund
- 1070400-Medicaid- Aged Blind and Disabled
- 1070500-Medicaid- Low-Income Medicaid
- 1070600-PeachCare
- 1070800-State Health Benefit Plan

A red arrow points to the dropdown arrow next to the 'Program' field.

28. Click Apply.

The screenshot shows the modal form with the 'Program' field updated to '1073200-Departmental Administration (DCH)'. The 'Years' field is 'FY 2019' and the 'Scenario' field is 'Budget'. A red arrow points to the 'Apply' button.

29. The point of view should now reflect the newly selected program.

**Enter Program Changes** ⓘ

Period Input	Version	Agency	Program	Years	Scenario
	Agency Working	419-Community Health	1073200-Departmental Administration (DCH)	FY 2019	Budget
Request Caption Input			No_Account	Total Object Class	

30. Repeat steps 5-28 to enter change request items in all impacted programs.

31. After all change items have been entered for a given fiscal year for that agency, click Next in the upper right corner of the screen.





☐ Complete

32. The Review Program Changes screen will allow the user to see detailed fund source information for each change for a given program and the total change amounts by program.

**Review Program Changes** ⓘ

Period Input	Version	Agency	Program	Years	Scenario
	Agency Working	419-Community Health, Department of	1073100-Healthcare Facility Regulation	FY 2019	Budget


	No_Fund	No_Fund	Total_Funds	State Funds	Federal and Other Funds
	Request Sequence	Request Caption	No_Account	No_Account	No_Account
Base Budget			25,288,384	13,215,132	12,073,252
Request1		Increase funds for three information technology positions and associated operating expenses.	315,000	250,000	65,000
Request2		Transfer funds to the Departmental Administration program for an information technology contract.	(75,000)	(75,000)	
Request3		Provide one-time funds for IT equipment.	80,000	80,000	
Total Requested Changes			320,000	255,000	65,000
Total			25,608,384	13,470,132	12,138,252

33. Click the plus sign next to a given fund source on the screen to expand the level of detail shown on the screen.

Total_Funds	State Funds	Federal Funds Not Specifically Identified	Medical Assistance Program	Maternal and Child Health Services Block Grant	Federal Funds	Federal Funds Group	Funds Group	Federal and Other Funds
No_Account	No_Account	No_Account	No_Account	No_Account	No_Account	No_Account	No_Account	No_Account
25,288,384	13,215,132	5,929,653	6,043,599		11,973,252	11,973,252	100,000	12,073,252
315,000	250,000			50,000	50,000	50,000	15,000	65,000
(75,000)	(75,000)							
80,000	80,000							
320,000	255,000			50,000	50,000	50,000	15,000	65,000
25,608,384	13,470,132	5,929,653	6,043,599	50,000	12,023,252	12,023,252	115,000	12,138,252

34. Number your requests using the Request Sequence column. This will impact the order in which request items are displayed in reports. Items can be numbered in any desired order, however, numbers should not be used more than once. After entering your sequence numbers, click Save.

**Review Program Changes** ⓘ

Period Input	Version Agency Working	Agency 419-Community Health, Department of	Program 1073100-Healthcare Facility Regulation	Years FY 2019	Scenario Budget	
		No_Fund	No_Fund	Total_Funds	State Funds	Federal and Other Funds
						
		Request Sequence	Request Caption	No_Account	No_Account	No_Account
Base Budget				25,288,384	13,215,132	12,073,252
Request1		1	Increase funds for three information technology positions and associated operating expenses.	315,000	250,000	65,000
Request2		2	Transfer funds to the Departmental Administration program for an information technology contract.	(75,000)	(75,000)	
Request3		3	Provide one-time funds for IT equipment.	80,000	80,000	
Total Requested Changes				320,000	255,000	65,000
Total				25,608,384	13,470,132	12,138,252

35. Using the pencil icon on the right, select each program for which you entered changes to verify all items are entered and correct.
36. After validating program entries, click Next in the upper right corner of the screen.



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## SUBMITTING THE AGENCY BUDGET REQUEST

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1. From the Review Program Changes screen, click Next in the upper right hand corner of the screen or from the Budget Development – 1) Agency Request Entry Task menu, select the Submit All Changes task item.

**Tasks: All Task Lists**

Filter: All

Name

- Budget Development - 1) Agency Request Entry
  - Cut-Off Amendment Selection
  - Review Base Budget
  - Enter Program Changes
  - Review Program Changes
  - Submit All Changes**
  - Enter KPI Information
  - Submit All KPI

2. The Submit All Changes screen will show a summary of all change items entered by program and fund source group in the lower grid and allow the agency to submit all changes to OPB.
3. Validate that the fiscal year and scenario (Budget vs AFY Budget) are correct in the top grid.

**Submit All Changes**

Period Input	Version	Agency	Years	Scenario
	Agency Working	419-Community Health, Department of	FY 2019	Budget

**Agency Submission Status**

Status	Submitted Date	Submitted Comments	Un-Submitted D

4. In the lower grid, validate that all requested change items are shown in the correct programs and that the total requested change amount is correct. To view a breakdown of State Funds versus Federal and Other Funds, click the plus sign next to Total\_Funds.



Agency Submission Status					
		Request Caption	No_Account		
		No_Fund	State Funds	Federal and Oth	Total_Funds
1073200-Departmental Administration (DCH) 1073100-Healthcare Facility Regulation	Request1	Transfer funds from the Healthcare Facility Regulation program for an information technology contract.	75,000		75,000
	Request1	Increase funds for three information technology positions and associated operating expenses.	250,000	65,000	315,000
	Request2	Transfer funds to the Departmental Administration program for an information technology contract.	(75,000)		(75,000)
	Request3	Provide one-time funds for IT equipment.	80,000		80,000
Total_Program		Changes	330,000	65,000	395,000

Also verify that a change type has been selected for each request item. The system will not allow the agency to submit a budget request with missing change types.

- Before submitting the budget request, export any view screens or run any confirmation reports for the agency request. These reports cannot be run on the Agency Working version after the request is submitted.
- To submit the request, click in the top grid labeled Agency Submit Status on the Submit All Changes screen. The user may either right click in the top grid to bring up the action menu, or left click and then select the orange Actions button in the top right of the screen.

- Mouse over the Workflow menu item and then click on Submit All.

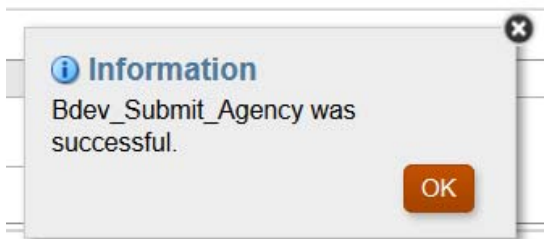
8. On the pop up window, enter any comments, if desired. The field will hold up to 2,000 characters, so the user may wish to type up comments in a separate document and paste the text into the field. Click the Launch button on the right to submit.

### Bdev\_Submit\_Agency

[Launch](#)[Cancel](#)

Enter Comments:

9. If the agency request complies with budget validation rules, a success message will appear after submitting. If the request does not pass validation, the user will get an error message directing them to make corrections to the request.



10. Click close to return to the task menu.

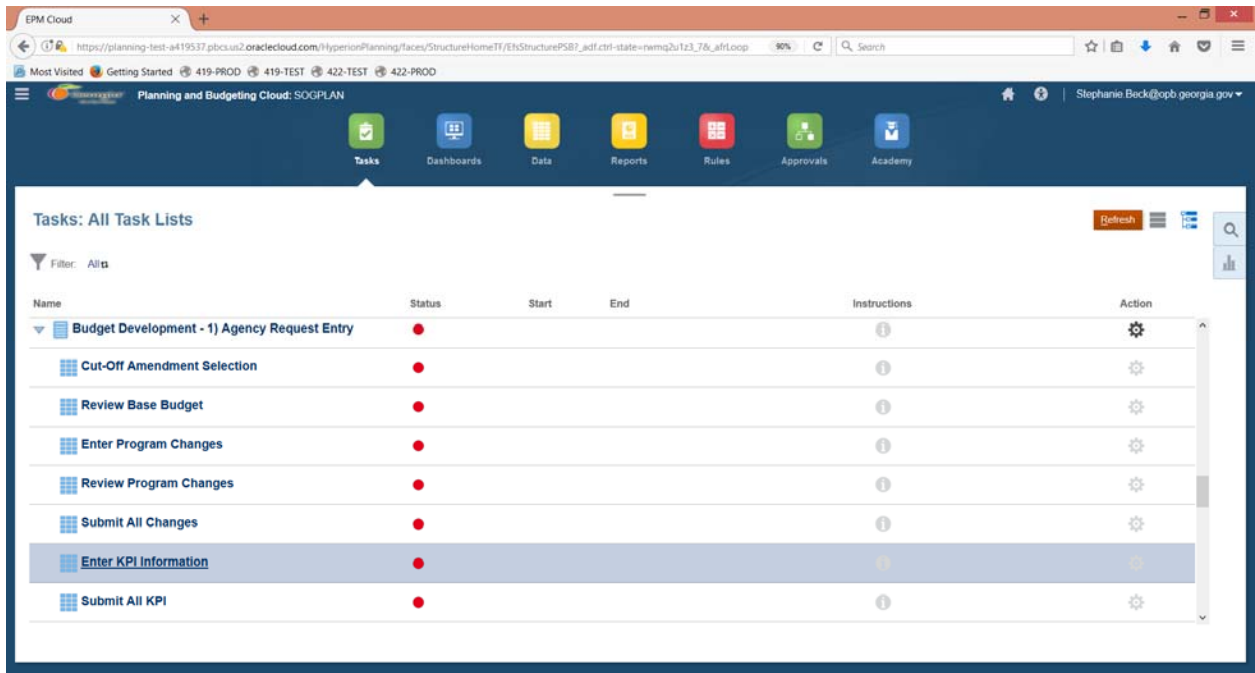
[Save](#)[Refresh](#)[Actions ▼](#)☐ Complete[Previous](#)[Next](#)[Close](#)

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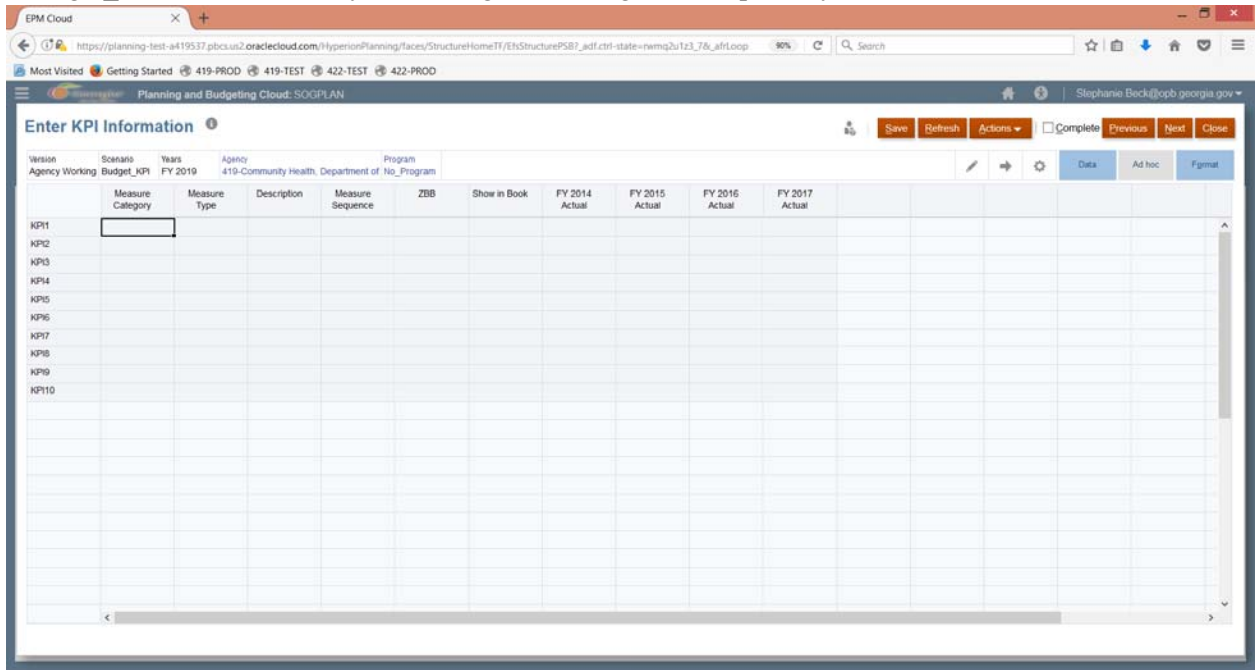
## ENTERING PROGRAM PERFORMANCE MEASURES

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1. From the Budget Development – 1) Agency Request Entry task menu, click on **Enter KPI Information**.



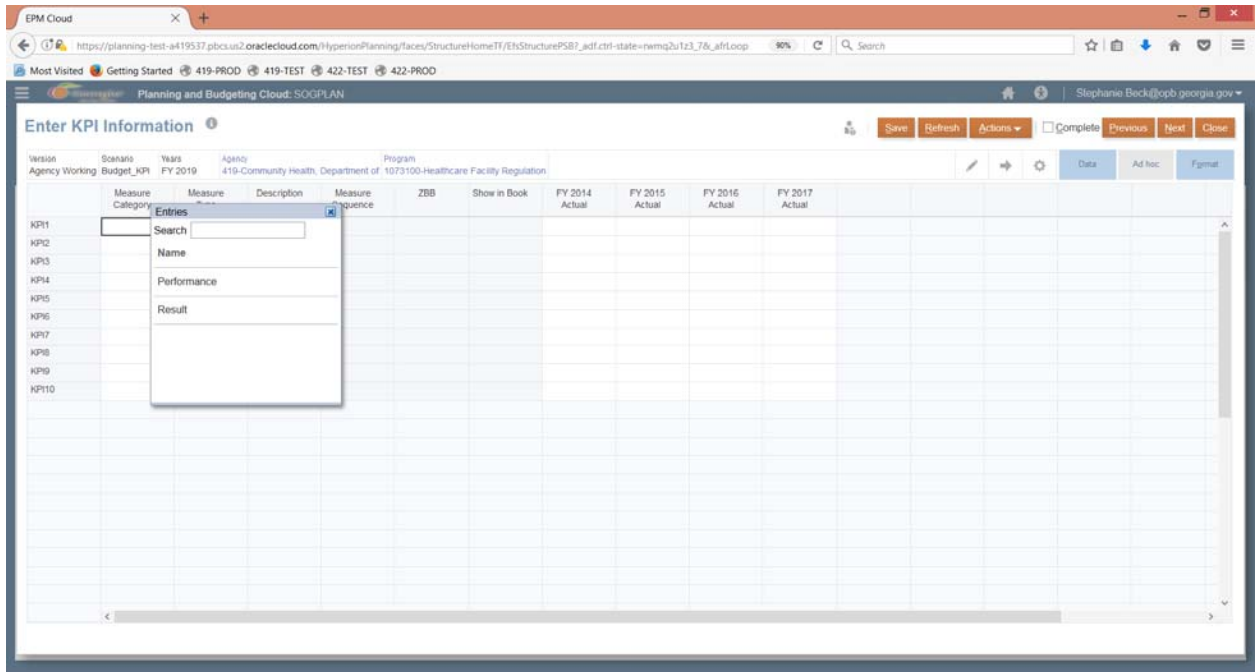
2. Performance measures must be entered in the General budget year only. The Amended fiscal year will have no option for entering measures. Validate that the point of view is set to Scenario "Budget\_KPI" and the fiscal year to the general budget development year.



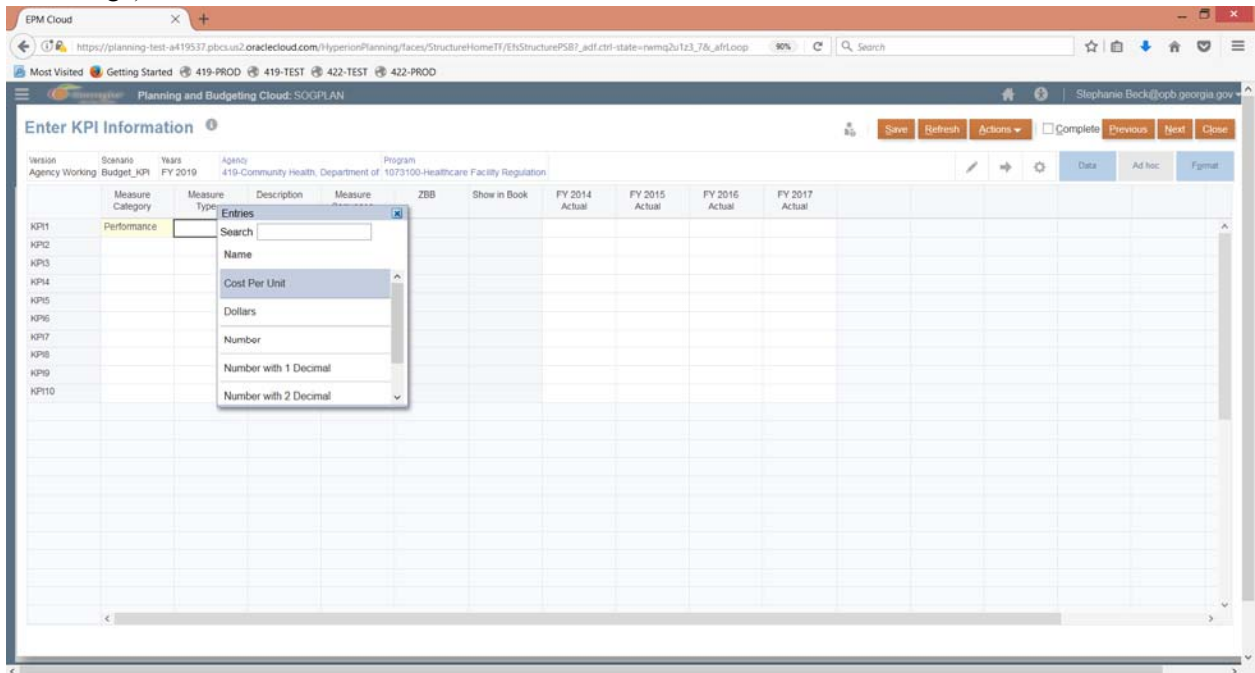
- Performance measures must be entered at the program level for each agency. To select the agency and program for which you wish to enter performance measures, click on the pencil icon on the right hand side of the screen.

- Click on the drop down box next to program. Click on the program for which you wish to enter performance measures and click Apply.

- In the first row, labeled KPI1, click in the Measure Category field and select either Performance or Result from the drop down menu.



- Click in the second column to identify the type of amount being reported. (i.e. Dollars, Cost Per Unit, Percentage)



- Under Description, enter the detail regarding the measure reported. Click in the field. A comment box will appear. Enter the descriptive information and click Save.

Version	Scenario	Years	Agency	Program							
Agency Working	Budget_KPI	FY 2019	419-Community Health, Department of	1073100-Healthcare Facility Regulation							
	Measure Category	Measure Type	Description	Measure Sequence	ZBB	Show in Book	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	
KPI1	Performance	Dollars	Percentage of applicable health care facility inspection results posted to the website within 30 days of inspection exit.								
KPI2											
KPI3											
KPI4											
KPI5											
KPI6											
KPI7											
KPI8											
KPI9											
KPI10											

8. The next three fields, Measure Sequence, ZBB, and Show in Book are for OPB use only and cannot be changed in the Agency Working version.
9. Enter actual results for the most recent four years in the four far right columns for the measure. Then click Save at the top of the screen.

Version	Scenario	Years	Agency	Program							
Agency Working	Budget_KPI	FY 2019	419-Community Health, Department of	1073100-Healthcare Facility Regulation							
	Measure Category	Measure Type	Description	Measure Sequence	ZBB	Show in Book	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual	
KPI1	Performance	Percentage	Percentage of applicable health care facility inspection results posted to the website within 30 days of inspection exit.				98.00%	95.00%	89.00%	85.00%	
KPI2											
KPI3											
KPI4											
KPI5											
KPI6											
KPI7											
KPI8											
KPI9											
KPI10											

10. Repeat steps 5-9 for remaining performance measures for the selected program.
11. After entering the measures for a given program, click the pencil on the upper right of the screen and

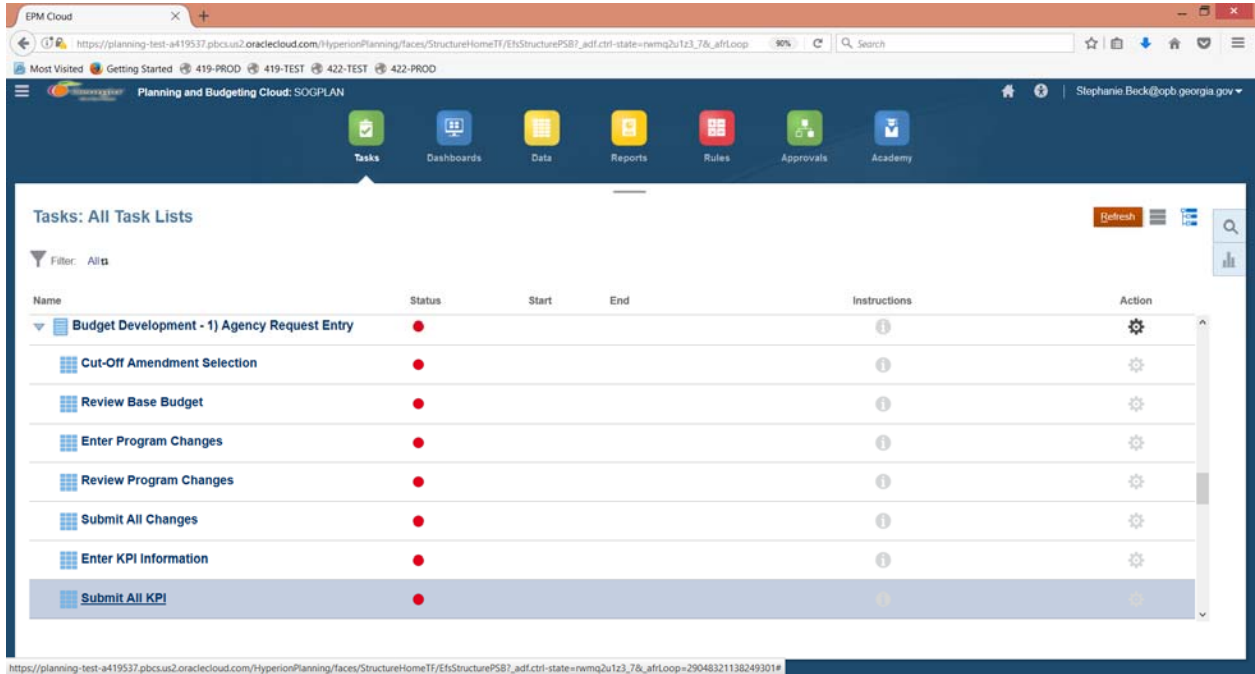
select a different program from the drop down menu. Click apply to work within that program.

12. Repeat steps 5-9 for each program for which you are entering measures.

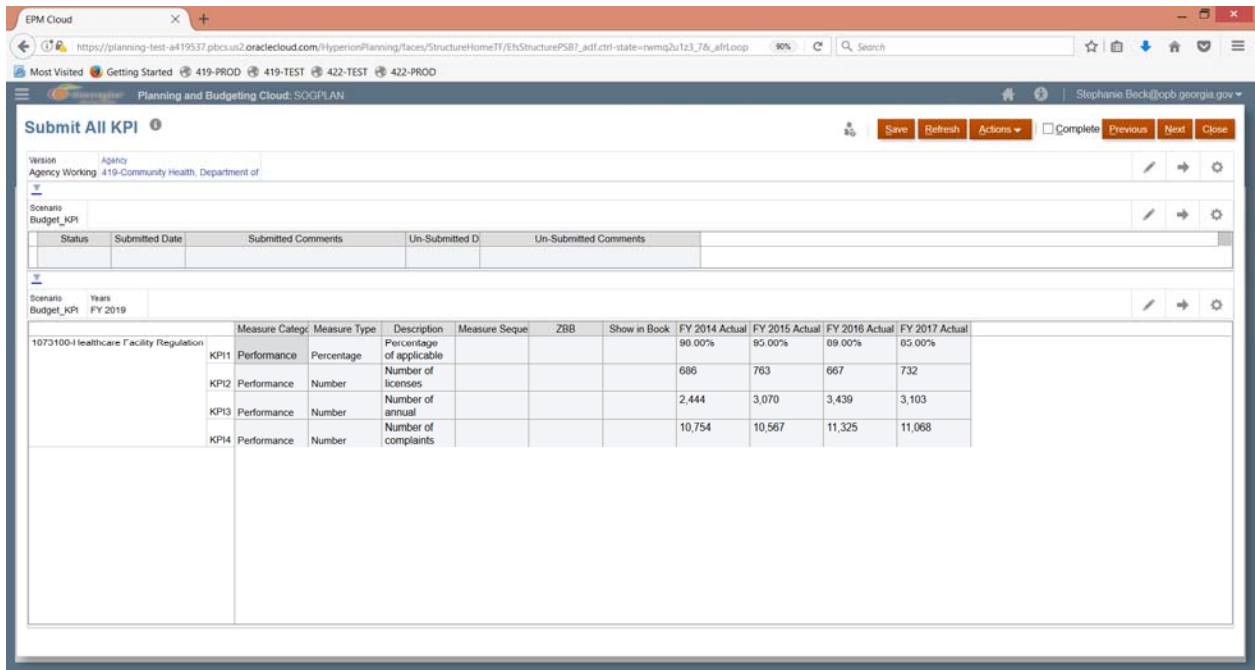
13. After all measures have been entered, click Next on the upper right hand side of the screen.

## SUBMITTING PROGRAM PERFORMANCE MEASURES

- From the Enter KPI Information screen, click Next on the upper right hand side of the screen or from the Budget Development – 1) Agency Request Entry task menu, select Submit All KPI.



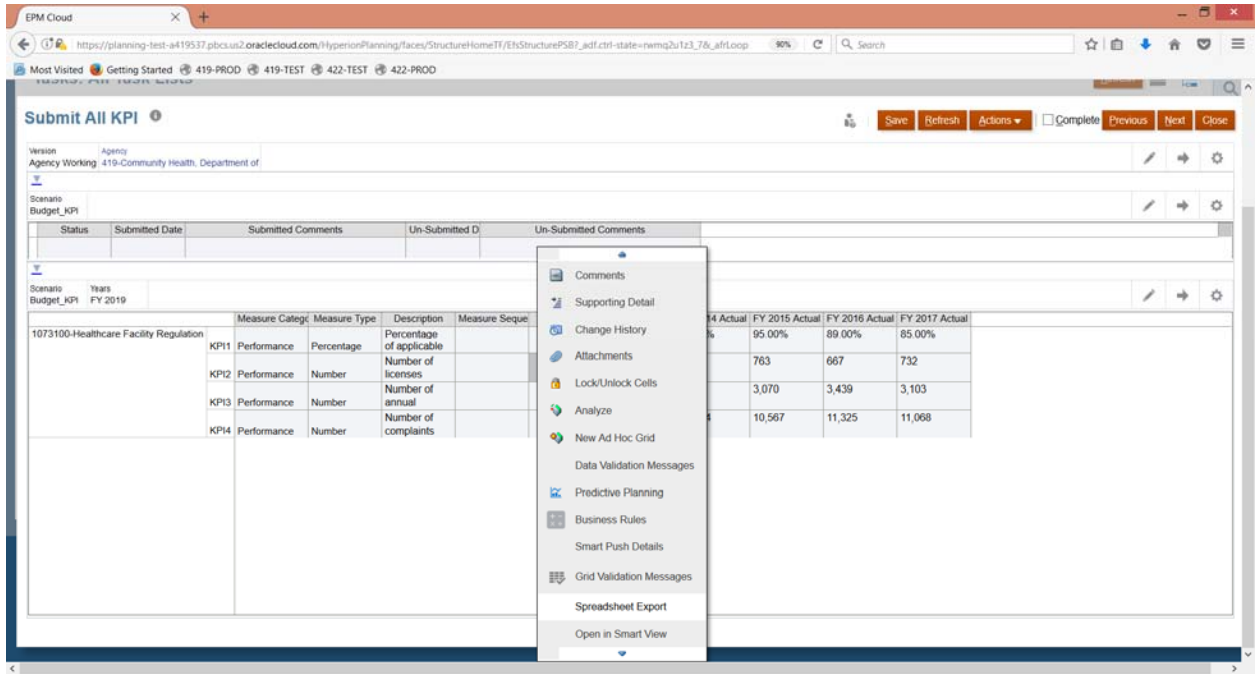
- On the Submit All KPI screen, all measures entered will be shown by program in the lower grid on the screen.



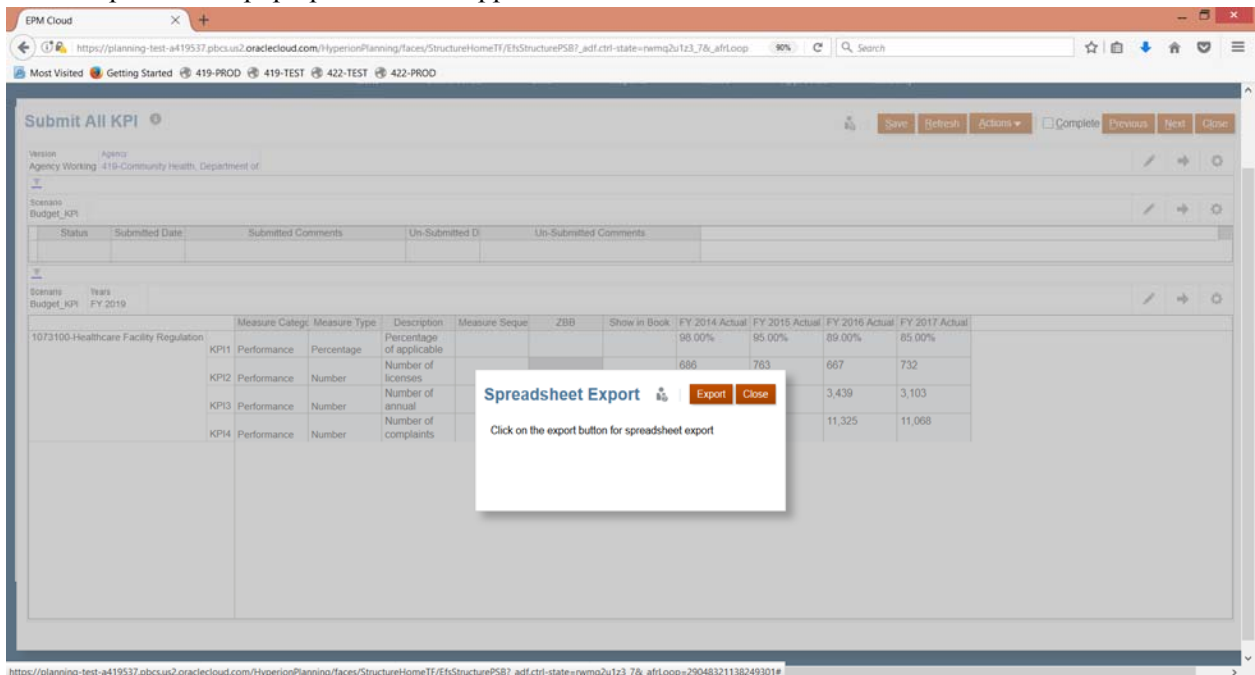


3. Validate the information entered on the screen. You may export the information to Excel to save prior to submitting the information.

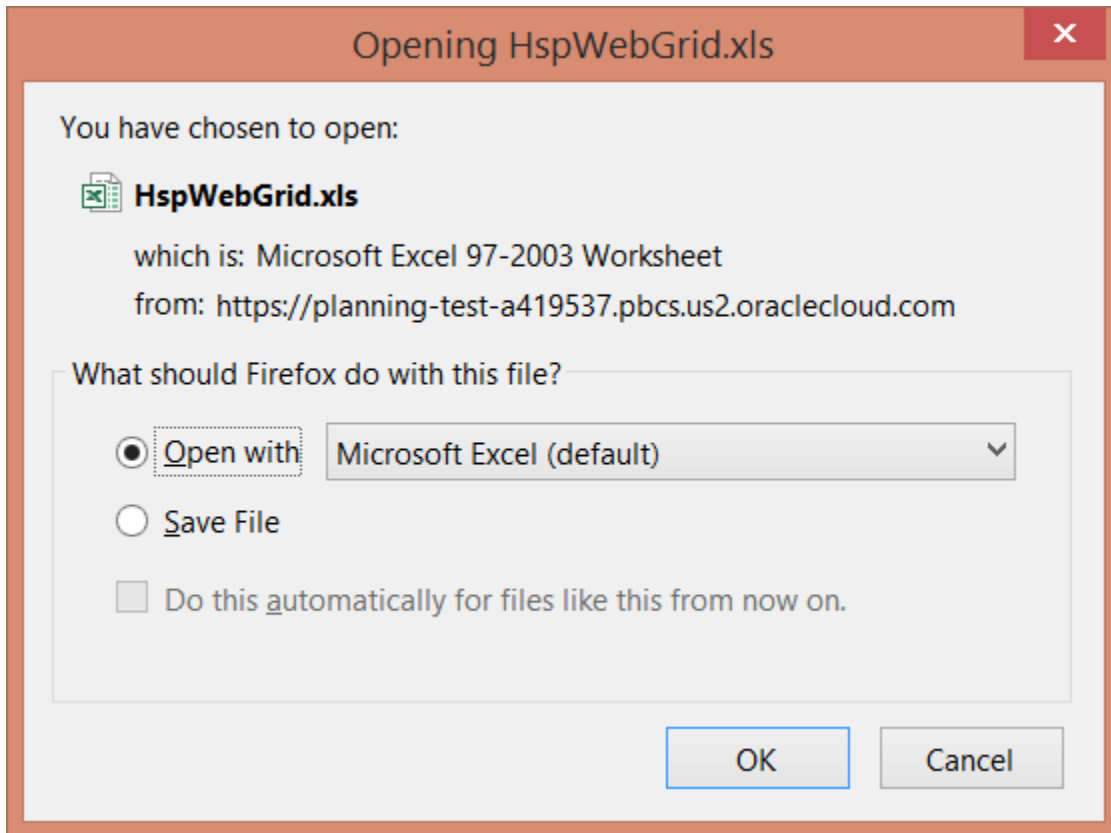
Right click in the lower grid. From the pop up menu, scroll down and click on the Spreadsheet Export option.



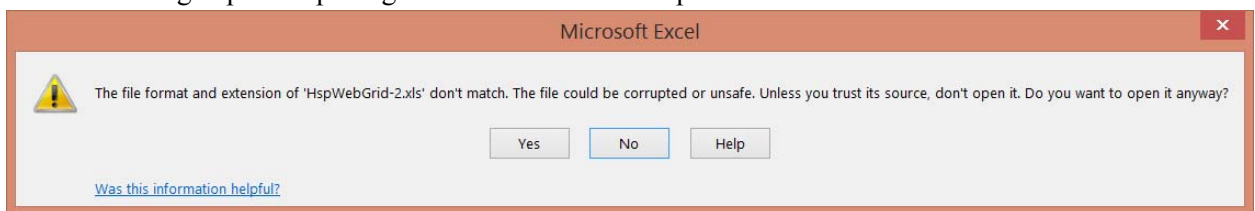
4. Click Export on the pop up screen that appears.



5. In the next menu, click to either save the file to a particular folder or to export directly to Excel. Click Ok.



6. If opening directly to Excel, the system exports the information in a web page format. You may get an error message upon it opening in Excel. Click Yes to proceed.



7. All KPI data entered for the selected agency will open in Excel for review or to allow you to save a copy to your files.

Microsoft Excel - HspWebGrid-2 (Protected View) - Excel

PROTECTED VIEW Be careful—files from the Internet can contain viruses. Unless you need to edit, it's safer to stay in Protected View. [Enable Editing]

	A	B	C	D	E	F	G	H	I	J	K	L
			419-Community Health, Department of	Input	Agency Working	No. Fund	No. FundCode	No. SubProgram	Budget KPI	FY 2019		
			Measure Category	Measure Type	Description	Measure Sequence	ZBB	Show in Book	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual
4	1073100-Healthcare Facility Regulation	KPI1	Performance	Percentage	Percentage of applicable health care facility inspection results posted to the website within 30 days of inspection exit.				0.98	0.95	0.89	0.85
5	1073100-Healthcare Facility Regulation	KPI2	Performance	Number	Number of licenses issued.				686	763	667	732
6	1073100-Healthcare Facility Regulation	KPI3	Performance	Number	Number of annual inspections, excluding complaint inspections				2444	3070	3439	3103
7	1073100-Healthcare Facility Regulation	KPI4	Performance	Number	Number of complaints reported				10754	10567	11325	11068

Recovered\_Sheet1

8. Click back to the browser in which you were working in PBCS.
9. To submit your performance measures, click in the upper grid on the Submit All KPI screen.
10. From the Actions menu, mouse over Workflow and then click on Submit All.

EPM Cloud

https://planning-test-4419537.pbcus2.oraclecloud.com/HyperionPlanning/faces/StructureHome?\_afcl=state=nwmq2u1z3\_7b\_afcl=loop

Most Visited Getting Started 419-PROD 419-TEST 422-TEST 422-PROD

Planning and Budgeting Cloud: SOOPLAN

Stephanie Beck@cpb.georgia.gov

### Submit All KPI

Save Refresh Actions Complete Previous Next Close

Version Agency  
Agency Working: 419-Community Health, Department of

Scenario  
Budget\_KPI

Status	Submitted Date	Submitted Comments	Un-Submitted D	Un-Submitted Comments

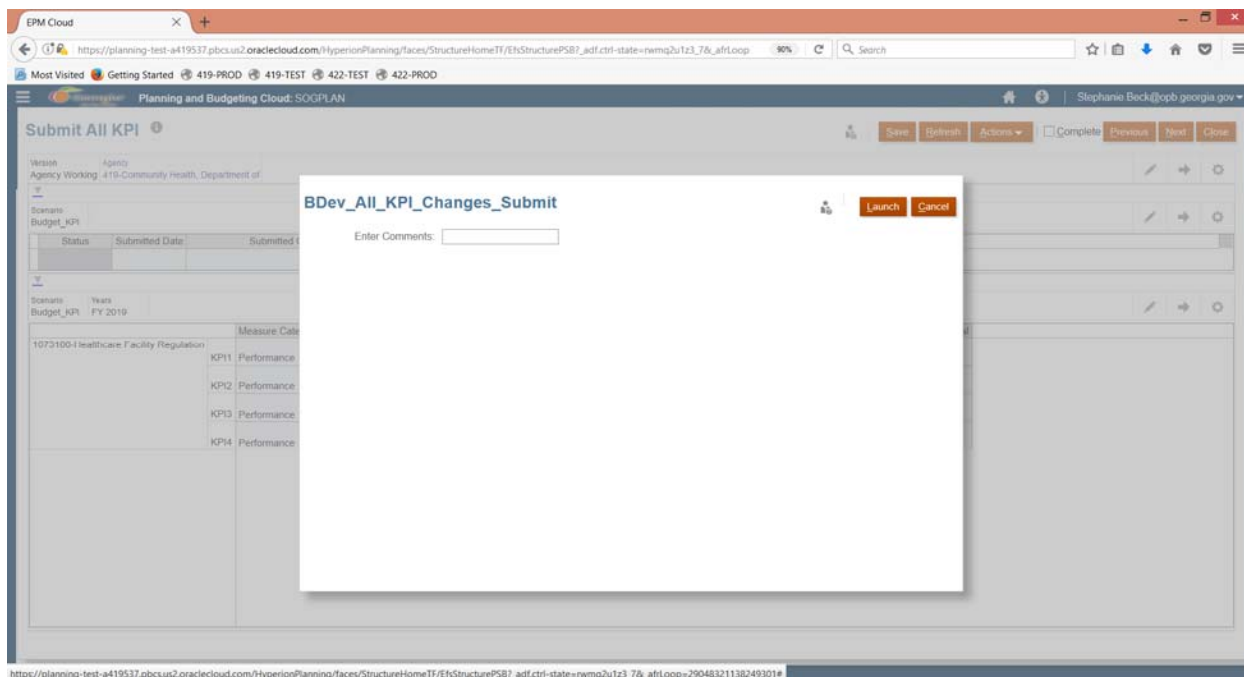
Scenario Years  
Budget\_KPI FY 2019

	Measure Category	Measure Type	Description	Measure Sequence	ZBB	Show in Book	FY 2014 Actual	FY 2015 Actual	FY 2016 Actual	FY 2017 Actual
1073100-Healthcare Facility Regulation	KPI1	Performance	Percentage of applicable				98.00%	95.00%	89.00%	85.00%
	KPI2	Performance	Number of licenses				686	763	667	732
	KPI3	Performance	Number of annual				2,444	3,070	3,439	3,103
	KPI4	Performance	Number of complaints				10,754	10,567	11,325	11,068

Workflow Edit Adjust Comments Supporting Detail Change History Attachments Lock/Unlock Cells Analyze New Ad Hoc Grid Data Validation Messages Predictive Planning Business Rules Smart Push Details

Submit All

11. On the popup screen, enter any comments you wish to record. The field will hold up to 2,000 characters. You may wish to type your comments in a separate application and paste them into the Comments field. Click Launch.



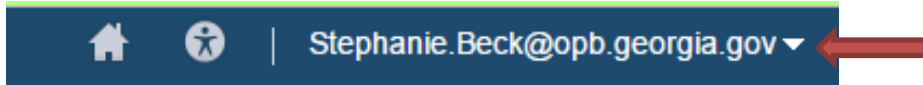
12. If performance measures pass validation rules, you will get a success message. If it fails to pass validation requirements, you will get an error message. Click the Back button to return to the Enter KPI Information screen to correct any errors. Then attempt to submit again.
13. Once performance measures have been successfully submitted, click Close on the upper right hand side of the screen to return to the task menu.

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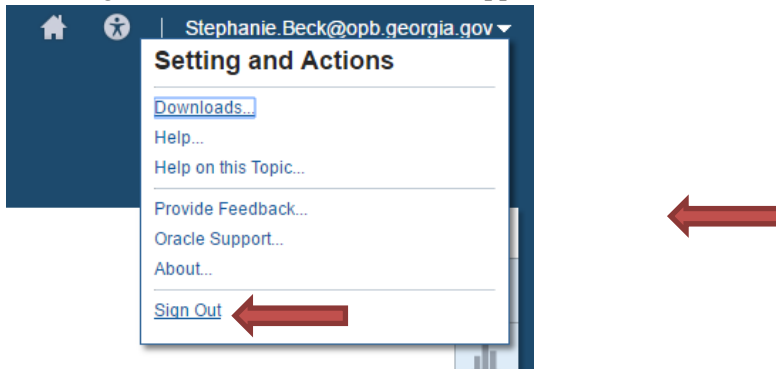
## LOGGING OUT OF THE SYSTEM

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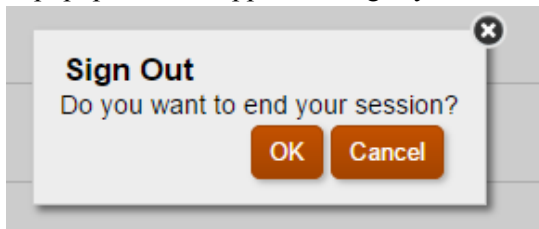
1. To sign out of the system, click the upside down triangle next to your username in the upper right hand corner of the screen.



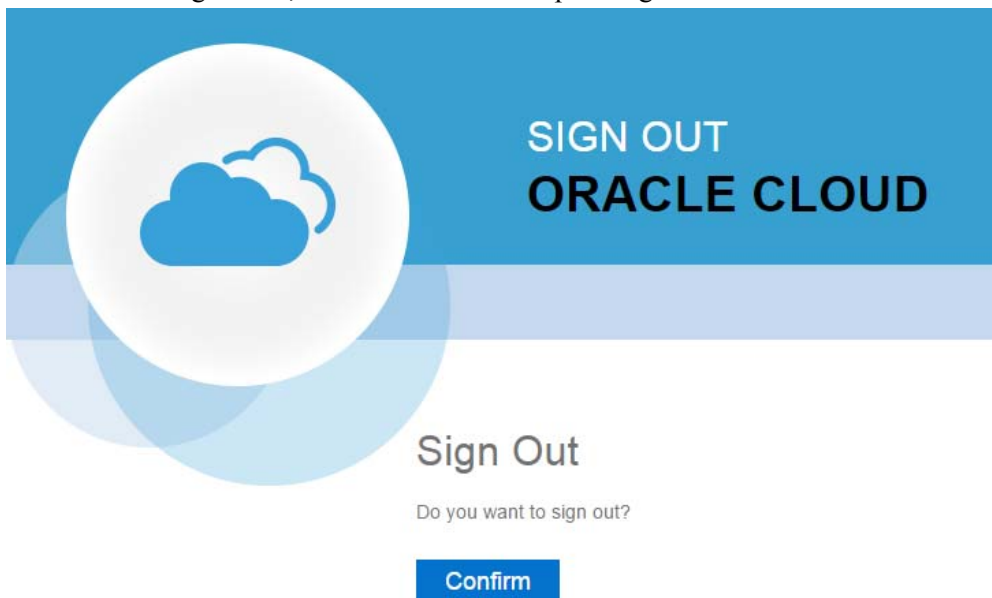
2. Click Sign Out on the action menu that appears.



3. A popup box will appear asking if you would like to end your session. Click OK.



4. On the following screen, click Confirm to complete sign out.



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## Issues Tracking System (ITS)

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### SUBMITTED BUDGET DEVELOPMENT TICKETS

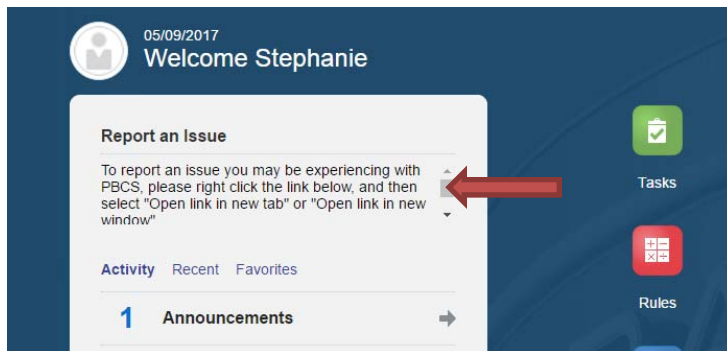
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The Issues Tracking System (ITS) allows all users to create tickets to file trouble reports, ask questions, submit comments or raise issues about the PBCS System.

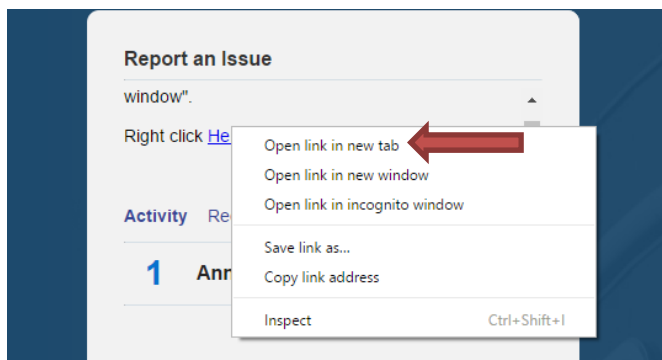
1. To generate a support ticket, click the home icon at the top of the screen to take you to the main PBCS home page from your current location in the system.



2. On the left hand side of the screen is a gray box for announcements. Under the header **Report An Issue**, scroll down until you see a highlighted link that says “Right click Here.”



3. Right click the highlighted blue link and select “Open link in new tab” on the popup menu.



- A new tab will appear at the top of your browser. Click on the new tab to view the ticket submission screen.

- Complete the form as described below:

Field Name	Explanation
Reported By	Please enter your name, if not already populated, so that you can be contacted regarding this ticket if necessary.
Your email:	Enter your email address. It is a required field.
Subject (mandatory field)	Enter the subject of the ticket. For example – “Object Class Missing”
Description of Use	Type in your question, suggestion, or issue. Please provide the necessary information and explain the issue with as many details as possible. If an error message appeared, include it in its entirety. Required details include: agency name, budget year, and dataset.

- Click the disk icon to submit the ticket. Click the slash icon to cancel the ticket.



- As soon as the disk icon is clicked, a ticket number is assigned and an email is generated. The email will reference your ticket number and include a link that you can click on to see the current status of your ticket. You can also contact the Help Desk via email at (Helpdesk@opb.state.ga.us). Be sure to include your ticket number in the email. Please submit a separate ticket for each issue, question, or suggestion you may have.
- You may now click the tab in your browser header to return to PBCS.