

Budget Structure Process Tips

The following section describes in **detail** the steps necessary to complete the budget structure process (i.e. new, changing, deleting, etc. to cross-reference). It will tell you what to do to complete each step, who is responsible for what actions, and what approvals you need. Work through the steps to the best of your ability. If there are questions, contact your BAM analyst or SABR staff. As a friendly reminder, changes to Summary Cross-References and major changes to Detail Cross-References have been discussed and approved with BAM and LFO Analysts.

Responsibilities

Agency

Request cross-reference updates (changes and additions) in writing. Include all required information:

- Description/title and if it is it an SCR or DCR
- 'Parent' cross-reference number
- Requested cross-reference number
- CFO Analyst approval is required prior to input into ORBITS. Agency should discuss with analyst prior to submitting changes.
- Ensure that cross-reference hierarchy is accurate
- Verify when the structure was last used and/or displayed

Tips for Cross-reference Requests

- Requests to change existing or add new cross-reference numbers contain all necessary information.
- Changes to existing cross-reference numbers are limited to the title or description changes only.
- Addition of new cross-reference numbers – Required data elements are:
 - Requested 12 digit cross-reference number (45 character title/description)
 - Is it a detail (DCR) or summary (SCR) level? If it is a DCR, what is the SCR to which it points?
 - All DCR numbers rolling to the correct parent and/or SCR number
 - SCR numbers reflect budget presentation level agreed to by BAM and LFO Analysts
 - Cross-reference changes have prior approval from BAM Analyst

SABR Section

- Validates requests can be done without deleting existing budget data
- Adds new, or makes changes to existing cross-reference numbers as requested by agency
- Determine whether deleting or inactivating structures is appropriate
- SABR Section staff notifies agencies that their cross-reference modifications are completed and ready for review either online or in printed format from their remote location
- Performs audit of cross-reference hierarchy for accuracy
- Provides agency with a copy of the approved cross-reference audit transmittal

CFO and LFO Analysts

- Approves all cross-reference numbers changes.

Useful Reports

- The BSU002 Cross-reference Report is used during this phase to assist agencies.
- Menu path = Reporting → Budget Start-up → BSU002A – Cross Reference Report
- Selection Criteria: Bien = current Bien → Agency = Desired agency