ADJUSTMENTS TO THE FY2015 MIDTERM BUDGET - INSTRUCTIONS

Use the FY2015 Midterm Budget Adjustment software to create, modify, prioritize, and print adjustments to the FY2015 appropriations.

- Please see the **August 5, 2013** memos from Secretary Barnes and OPM's Executive Budget Officer for policy specifics.
- The Midterm software is available for download at:

  http://www.ct.gov/opm/cwp/view.asp?a=2961&Q=486838&opmNav_GID=1793
- Click on the "FY2015 Midterm Adjustments Software" link to download the software. The software executable has been compressed using WinZip. Click on the Save button to save the zip file to your network or hard drive and use WinZip or a similar software to uncompress the executable.

MENU COMMANDS

Exit: Terminates Midterm Adjustments processing and returns you to the desktop.

Sort: Arranges adjustments by priority or title – Priority is the default sort.

Print: Prints by adjustment Type, prints All Adjustments, or prints the Summary.

Summary totals the FY15 Base, FY15 Adjustment, FY15 Revised and FY16 Adjustment - Annualized columns by adjustment title and serves as your submittal document.
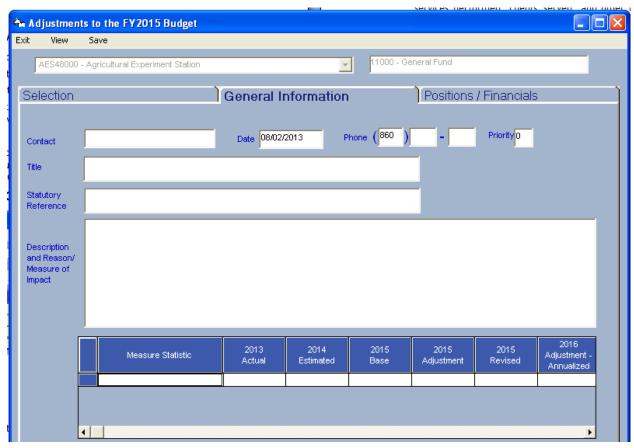
Submit to OPM:

Sets a flag on the OPM server to indicate that you have completed your agency's adjustments and they are ready for review.   (Individual adjustments must be checked on the Selection tab/Submit column before you click 'Submit to OPM'.)
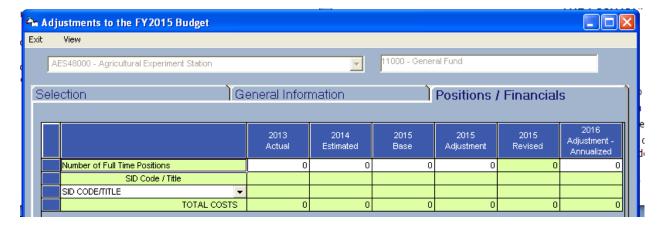
THE SELECTION TAB

- **To Begin:**   Select your agency and fund.
- **To Create a New Adjustment**:   Double click on the green row "Add New (Reduction/Reallocation/Revenue/Technical) Adjustment".
- **To Edit an Existing Adjustment**: Double click on the existing adjustment title to open adjustment.
- **To Delete an Adjustment:**   Click the leftmost row marker box of the desired record to highlight the row; click the 'Yes' when prompted to delete.
- **To Select an Adjustment for Submittal:** Click the check box (rightmost column labeled 'Submit') for each adjustment that you want included in your submittal. When finished, click 'Submit to OPM' on the top menu bar. Once an adjustment is checked and submitted, its status cannot be changed. Only items that have been checked will be available for analysts to review; unchecked items will not be visible to the analysts.

THE GENERAL INFORMATION TAB

- **Navigate** through the screen using the tab key.

- **Contact**, **Title**, and **Description and Reason/Measure of Impact** are required fields.

- Enter a **Priority Number** to rank each adjustment.

- Enter the **Statutory Reference** if applicable.

- Quantify this statement in the **Statistics** section, showing service reductions as negative. Non-additive (ie: ratios; percentages) or text based entries are acceptable.

THE POSITION/FINANCIAL TAB

Positions: Enter full-time positions on the top row labeled "Number of Full Time Positions".

Financials: Select SIDs by clicking on the down arrow below the SID Code/Title column header.

Format: Enter position/financial amounts reflecting a reduction in services **as negative**.

Delete Item: Click the leftmost row marker box of the desired record to highlight the row; click the 'Yes' when prompted to delete.

View: Click the View menu command to generate a print of the current adjustment.

SUBMITTAL REQUIREMENTS

- For each adjustment you want to submit, **check the 'Submit'** box the Selection tab, then click **"Submit to OPM"** on the top menu bar.

- OPM gets one hardcopy of each adjustment, and the signed Adjustment Summary.

- All attachments supporting your adjustments must be submitted electronically.

- Remember to submit hardcopy to your OFA analyst as well.

- **TECHNICAL ADJUSTMENTS are due by September 3**.

- A second submittal will be required for non-technical adjustments; **the due date for REDUCTION, REALLOCATION, AND REVENUE ADJUSTMENTS will be announced at a later date**.

GETTING HELP

Direct technical questions, comments, and suggestions to the ADS Unit:

- Scott McWilliams   860-418-6249   scott.mcwilliams@ct.gov

POLICY QUESTIONS SHOULD BE DIRECTED TO YOUR BUDGET ANALYST.