

Commonwealth of Virginia Performance Budgeting System

User Roles/Permissions By Module

System Modules	System User Roles							
	Agency Analyst*	Agency Reviewer**	Agency Func Admin*	DGS Reviewer*	DPB Analyst	DPB Assoc Director	DPB Director	DPB Func Admin
User Maintenance	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Creates and disables user accounts based upon requests from agencies as confirmed by DPB staff or other corroborating sources.
User Security Permissions	N/A	N/A	Provides agency users with permissions to various modules (for agencies assigned by DPB in the User Maintenance module)	N/A	N/A	N/A	N/A	Provides agency, DGS reviewer, or DPB users with permissions to various modules.
Budget Execution	Enters requests to change operating or capital budgets or authorized positions by creating new budget execution work items. Submits budget execution work items to agency reviewer.	Reviews budget execution work items submitted by Agency Analyst. Sends budget execution work items back to Agency Analyst for additional work/corrections or submit to higher level agency review or submitted to DPB for review.	N/A	N/A	Reviews agency submitted budget execution work items and submits as one of the following; 1) approves the work item if authority has been delegated given the specific budget execution transaction type and situation, 2) submits the work item for DPB Associate Director review or approval as delegated authority or other factors require, 3) returns the budget execution work item to the agency for corrections, 4) denies the request. Creates new budget execution work items to adjust agency budgets consistent with delegated authority.	Reviews budget execution work items submitted by agencies and DPB analysts and submits as one of the following; 1) approves the work item if authority has been delegated given the specific budget execution transaction type and situation, 2) submits the work item for DPB Director approval as delegated authority or other factors require, 3) returns the budget execution work item to the DPB analyst, 4) denies the request.	Reviews budget execution work items submitted by DPB associate directors and submits as one of the following; 1) approves the work item, 3) returns the budget execution work item to the previous level, 3) denies the request.	Prepares the module for agency and DPB entry at the beginning of each fiscal year. Bulk loads execution transactions for multi-agency actions such as the distribution of Central Appropriation amounts and the loading of type "D" amended legislative appropriation amounts.

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Base Budget Target	N/A	N/A	N/A	N/A	Enters Base Budget targets using parameters stipulated by management (if not bulk loaded by DPB Func Admin)	N/A***	N/A***	Prepares module for DPB analyst entry. If applicable, bulk loads Base Budget targets using parameters stipulated by management. Releases targets to agencies after analyst entry is complete and targets have been validated to match management stipulations.
Base Budget	Enters base budget amounts in a base budget work item as governed by targets issued by DPB via the Base Budget Target module. Submits base budget to Agency Reviewer.	Reviews base budget amounts entered by Agency Analyst. Sends base budget back to analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted base budgets and makes recommendations regarding submitted amounts as governed by Base Budget Targets. Sends base budget back to agency for additional work/corrections or submits the base review as "review completed".	N/A***	N/A***	Prepares module for agency and DPB analyst entry and review. As needed, sends base budgets that have been submitted as "review complete" back to DPB analyst review.
Base Budget Adjustment Preparation	N/A	N/A	N/A	N/A	Enters GF/NGF targets for base adjustments in consultation with DPB management and higher level decision makers.	N/A***	N/A***	Prepares module for DPB analyst entry. Releases base adjustment targets to agencies after analyst entry is complete in accordance with management decisions.

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Base Budget Adjustment	Enters base adjustment amounts by creating base adjustment work items as governed by targets issued by DPB via the Base Budget Adjustment Preparation module. Submits base adjustment work items to Agency Reviewer.	Reviews base adjustment work items submitted by Agency Analyst. Sends base adjustment work items back to agency analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted base adjustment work items and makes recommendations regarding submitted amounts as governed by Base Adjustment Targets. Sends base adjustment work items back to agency for additional work/corrections or submits the base adjustment work items as "review completed".	N/A***	N/A***	Prepares module for agency and DPB analyst entry and review. As needed, sends base adjustment work items that have been submitted as "review complete" back to DPB analyst review.
Base Budget Adjustment Bulk Submit	N/A	Submits multiple base adjustment work items to DPB at one time or submits multiple work items back to Agency Analyst review for corrections.	N/A	N/A	N/A	N/A	N/A	N/A
Decision Package	Enters agency budget requests by creating new decision package work items. Submits decision package work items to agency reviewer.	Reviews decision package work items submitted by Agency Analyst. Sends decision package work items back to Agency Analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted decision package work items and reflects decisions made by the Governor and other decision makers. Creates new decision package work items to reflect decisions made by the Governor and other decision makers. Sends decision package work items requested by agency back to agency for additional work/corrections or submits work items as "review completed".	N/A***	N/A***	Prepares module for agency and DPB analyst entry and review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.

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Decision Package Prioritization	Enters decision package agency prioritization prior to Agency Reviewer submission to DPB.	Enters decision package agency prioritization prior to submission of decision package work items to DPB.	N/A	N/A	N/A	N/A	N/A	N/A
Decision Package Bulk Submit	N/A	Submits multiple decision package work items to DPB at one time or submits multiple work items back to Agency Analyst review for corrections.	N/A	N/A	N/A	N/A	N/A	N/A
Capital Budget Request	Enters capital budget requests by creating new capital budget request work items. Submit capital budget requests work items to agency reviewer.	Reviews capital budget request work items submitted by Agency Analyst. Sends capital budget request work items back to Agency Analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted capital budget request work items and reflects decisions made by the Governor and other decision makers. Creates new capital budget request work items to reflect decisions made by the Governor and other decision makers. Sends work items requested by agency back to agency for additional work/corrections or submits work items as "review completed".	N/A***	N/A***	Prepare module for agency and DPB analyst entry and review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.
Capital Budget Request Prioritization	Enters capital budget request agency prioritization prior to Agency Reviewer submission to DPB.	Enters capital budget request agency prioritization prior to submission of decision package work items to DPB.	N/A	N/A	N/A	N/A	N/A	N/A

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Capital Budget Request Bulk Submit	N/A	Submits multiple capital budget request work items to DPB at one time or submits multiple work items back to Agency Analyst review for corrections.	N/A	N/A	N/A	N/A	N/A	N/A
General Assembly Adjustments	N/A	N/A	N/A	N/A	Reflects amendments made by the General Assembly to the Governor's introduced budget. Submits work items as "entry completed".	N/A***	N/A***	Prepare module for DPB analyst entry. As needed, sends work items that have been submitted as "entry completed" back to DPB analyst review.
Budget Savings Scenarios	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Establishes budget savings scenarios from which budget savings targets are created in either the Budget Savings Target or Budget Savings Target Bulk Upload modules.
Budget Savings Target	N/A	N/A	N/A	N/A	If not bulk loaded by DPB Func Admin, enters exemptions and establishes budget savings targets as governed by the scenarios created in the Budget Savings Scenarios module.	N/A	N/A	Releases budget savings targets to agencies.
Budget Savings Target Bulk Upload	N/A	N/A	N/A	N/A	N/A	N/A	N/A	Bulk loads exemptions and budget savings targets for multiple agencies as governed by the scenarios created in the Budget Savings Scenarios module. Releases budget savings targets to agencies.

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Budget Savings Strategies	Enters individual savings strategies by creating new budget savings strategies work items as governed by the targets issued by DPB. Submits work items to agency reviewer.	Reviews savings strategies work items submitted by Agency Analyst. Sends work items back to Agency Analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted budget savings strategies work items. Creates new budget savings work items to reflect decisions made by the Governor and other decision makers. Sends savings strategies work items submitted by agency back to agency for additional work/corrections or submits work items as "review completed".	N/A***	N/A***	Prepares module for agency and DPB analyst entry and review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.
Budget Savings Strategies Bulk Submit	N/A	Submits multiple budget savings strategies work items to DPB at one time or submits multiple work items back to Agency Analyst review for corrections.	N/A	N/A	N/A	N/A	N/A	N/A
Budget Savings Selector	N/A	N/A	N/A	N/A	Reflects decisions made by the Governor and other decision makers regarding budget savings strategies	N/A***	N/A***	Prepares module for DPB analyst entry and review.
Six-Year Nongeneral Fund Revenue Estimate	Enters six year nongeneral fund revenue estimates by creating a new work item. Submits work item to Agency Reviewer.	Reviews nongeneral fund revenue estimate work item submitted by Agency Analyst. Sends work item back to agency analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted nongeneral fund revenue estimate work item and makes recommendations. Sends work item back to agency for additional work/corrections or submits the work items as "review completed".	N/A***	N/A***	Prepares module for agency and DPB analyst entry and review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.

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	Agency Analyst*	Agency Reviewer**	Agency Func Admin*	DGS Reviewer*	DPB Analyst	DPB Assoc Director	DPB Director	DPB Func Admin
Supplemental Reporting	Enters applicable supplemental reporting requirements by creating a new work item. Submits work item to Agency Reviewer for review/approval.	Reviews supplemental reporting work item submitted by Agency Analyst. Sends work item back to agency analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted supplemental reporting work item. Sends work item back to agency for additional work/corrections or submits the work items as "review completed".	N/A***	N/A***	Prepares module for agency entry and DPB analyst review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.
Capital Project Review	Enters information for applicable capital projects by creating a new work item. Submits work items to Agency Reviewer for review/approval.	Reviews capital project review work items submitted by Agency Analyst. Sends work items back to agency analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted capital project review work items and makes recommendations with management concurrence. Sends work item back to agency for additional work/corrections or submits the work items as "review completed".	N/A***	N/A***	Prepares module for agency entry and DPB analyst review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.
Draw Schedule	Enters information for applicable capital project draw schedules by creating a new work item. Submits work items to Agency Reviewer for review/approval.	Reviews draw schedule work items submitted by Agency Analyst. Sends work items back to agency analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted draw schedule work items. Sends work item back to agency for additional work/corrections or submits the work items as "review completed".	N/A***	N/A***	Prepares module for agency entry and DPB analyst review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.

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Maintenance Reserve Reporting	Enters maintenance reserve reporting by creating a new work item. Submits work item to Agency Reviewer for review/approval.	Reviews maintenance reserve reporting work item submitted by Agency Analyst. Sends work item back to agency analyst for additional work/corrections or submits to higher level agency review or submits to DPB for review.	N/A	N/A	Reviews agency submitted maintenance reserve work item. Sends work item back to agency for additional work/corrections or submits the work items as "review completed".	N/A***	N/A***	Prepares module for agency entry and DPB analyst review. As needed, sends work items that have been submitted as "review complete" back to DPB analyst review.

Notes:

*Non-DPB user roles in the PB System can not approve or complete a work item. These user roles can only submit a work item to DPB. Action is required on DPB's part to approve or otherwise complete a work item.

**Agencies may designate up to five levels of Agency Reviewer. If an agency has multiple reviewer levels, an applicable work item must be submitted through these levels before it can be submitted to DPB.

***DPB Associate Director and the DPB Director review for certain modules are handled via reporting in lieu of the embedded workflow included in other modules such as Budget Execution.