



Office of Planning and Budget

"Managing for Results"



Agency Head Approval for Performance Indicators

After selecting Agency Approval option from the LaPAS website, the following window will display. The Agency Head Approval Window allows the designated approving authority to approve completed performance indicators (PI's).

This window contains ten tabs across the top that allow you to navigate through the various functions that the designating approving authority needs to select, approve, and analyze PI's.

Constantly read the message line (N) at the bottom of the window for instructions and information to assist in the approval/analysis process.

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A. Logon

Guidelines for logon:

- 1. You must be issued a Logon Id and password to use the system. If you have not done so, complete a LaPAS data entry userid request form and forward to the individual identified at the bottom of the form. The form can be accessed from the LaPAS website.
- 2. Both the logon id and password must be entered using lower case letters.
- 3. You have three tries to logon successfully. After three unsuccessful attempts, your logon id will be locked and the system will close. To have your userid reset, you must contact the Office of Planning and Budget.

Logon process:

Enter your logon id and the password in the appropriate fields and click on the Connect button. The first time you logon, your logon id and password will be identical. When you click the <u>Connect</u> button (K), change password fields will display and you will be required to change your temporary password to one of your choosing. This new password will be the one you will use when you logon in the future.

Check the message line (N) for any errors or other messages and follow the directions you see.

Once a successful connection notice appears in the message line, across the top of the screen will be a red popup with an important LaPAS message. This message will normally tell you if PI's are available for update. The popup can be closed by left mouse clicking on the Close Window link at the bottom of the popup after approximately ten seconds.

PI Agency Head Update - Microsoft	t Internet Explorer	
	PI Message PLEASE READ IMPORTANT MESSAGE:	:
	LaPAS is open for 1st Quarter reporting.	
THE CLOSE WINDOW LINK	WILL BE ENABLED IN ABOUT 10 SECONDS - PLEASE CLOSE AT TH	AT TIME!
	<u>Close Window</u>	

B. Department Tab

Note: The Department tab will not be available to all users. If you are assigned to only one department, the department tab will be disabled and the department will default to the one you are assigned.

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The Department tab (B) is used to drill down to a specific department level. Selecting the department filters the agencies that will display when you subsequently click on the Agency tab (C). If you have multiple department level permissions, you must select a department to ultimately be able to select a PI.

Once selected, the department number and name will be displayed on a header line below the fiscal year. Proceed to the Agency tab (C) to select an agency.

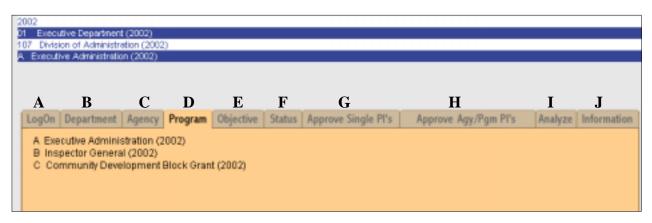
C. Agency Tab

Note: If you are assigned to one agency only, the agency number will default to the one assigned and the Agency tab (C) will be disabled.

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Clicking on the Agency tab (C) after selecting a department will display a list of the agencies within the department. Select an agency from the list by placing the curser on the agency and clicking the mouse. The highlighted agency will appear in a header line immediately below the department. You may now go to the Status tab (F) and retrieve all the PI's for the selected agency if you do not wish to drill down further to a program (D) and/or objective (E).

D. Program Tab



Once an agency has been selected, clicking on the Program tab (D) will display all the programs for the selected agency or the agency to which the agency is assigned This allows you to drill down to a specific program and the PI's that fall within. Once selected, the highlighted program will display in a header line immediately below the agency line.

E. Objective

2002 01 Executive Department 107 Division of Administration A Executive Administration	tion (2002) n (2002)	a Policy, to complete 80% of the step	no necessary in consiste the Co	northensive Annual
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A B LogOn Department	C D E Agency Program Objective	F G Status Approve Single PI's	H Approve Agy/Pgm PI's	Analyze Information
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Clicking the Objective tab (E) after selecting a program will display the objectives within the program. You must select a program to drill down to a specific objective. Once selected, the highlighted objective will display in a header line immediately below the program line.

At this point in the selection process, the header should show the fiscal year, the selected department, agency, program and objective.

F. Status

The Status tab (F) allows you to do two things:

- 1. Check PI's to determine completion status.
- 2. Determine whether PI's have been approved.

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Step one is to determine which PI's are complete. (*PI's are complete when all the information required for the quarter has been entered. Refer to the Quarterly Performance Progress Report instructions for each quarter's requirements.*) Click the Retrieve button to populate the window with PI information. Each row displayed is a separate PI. The name of the highlighted row/PI will appear on a header line immediately below the objective name.

Once retrieved, a number of columns will display for each PI. The first eight columns display the completion and approval status for the PI for each quarter of the fiscal year. For instance, if column Q1 C (Quarter 1 Complete) contains a "Y", the PI is complete for the quarter; "N" indicates incomplete. A "Y" in the Q1 A (Quarter 1 Approved) column indicates the agency head or designee has approved the PI for the first quarter; "N" indicates it has not been approved.

The ninth column indicates whether the PI is a (K) key indicator, a (S) supporting indicator, or a (G) general performance information indicator. Note that supporting indicators only require second and fourth quarter reporting for target and actual data. General performance information indicators require only second quarter reporting for prior year actual and fourth quarter reporting for year end (fourth quarter) actual. However, all indicators must be approved to signal a complete report.

Columns ten through thirteen display the agency number, program, objective, and PI number.

The lower left corner of the window also displays the completion status of the selected PI in check box format. Change the selection by clicking on another row. The selected row will be highlighted in white.

Click the Hi-lite button to display all quarters that have a "N" status in red, easily identifying those PI's that require updating.

Click on the Status button to determine if all the PI's for the selected organization level are complete. The result will tell you whether there are any PI's at the selected level (agency, program, objective) that should be updated.

Once you have determined which PI's are complete, you may proceed with the approval process. PI's may be approved singly, by program, or by agency. To approve singly, click on the Approve Single PI's tab (G); to approve by agency or program, click on the Approve Agy/Pgm PI's tab (H).

G. Approve Single PI's

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				Approve 5	Selected Pl		

A number of rows and columns will display containing information on the selected PI. There are five rows: Original PI and Quarters 1 through 4. The only field on this window that the agency approver may update is the notes field.

The Original PI row has ten columns:

- 1. Prior Yr. Act -- Prior year actual for this performance indicator.
- 2. PY Act Revised If prior year actual is revised, a "Y" will be displayed.
- 3. Perf Stnd -- Performance standard for this PI.

- 4. Perf Stnd Rev -- If revised by a BA-7 or August 15 adjustments, a "Y" will appear in this column.
- 5. Final Var % -- The variance between quarter four' actual and the performance standard.
- 6. Yearend Notes -- Notes of explanation for year end variance between the performance standard and the actual.
- 7. PI Code -- Unique code assigned to each PI that allows it to be tracked from one fiscal year to another.
- 8. PI Level -- Indicates whether PI is a key (K) indicator, a supporting (S) indicator, or a (G) general performance information indicator.
- 9. PI Format -- Indicates whether this PI is a per cent (%), dollars (\$), or a number (#).
- 10. Pos/Neg Ind -- Defaults to positive. Agency may change if a reduction indicates a favorable performance result.

The Quarter 1 – Quarter 4 rows contain fields that are completed or provide information. Each row has seven columns:

- 1. Target -- The PI's target or what you plan to accomplish by the end of that quarter.
- 2. Actual -- What you actually accomplished by the end of the quarter.
- 3. Var % -- The variance between the target and actual for the quarter. If the variance is greater that 5 %, an explanation should be in the notes column. *The variance column is expressed as a per cent. That means that 5 per cent is shown as 5.0.*
- 4. Revised -- Will have a "Y" displayed if the target has been changed after it was approved.
- 5. Actual Revised -- Will have a "Y" displayed if the actual has been changed after it was approved.
- 6 Agy App -- Will display a "Y" if the PI has been approved for that quarter.
- 7 Notes -- A text field which will contain any comments about that the report for that quarter.

To approve, click the Approve Selected PI button. This action will insert a "Y" in the appropriate Agy App field and also update the appropriate quarter approval field on the Status window. Check the message line for any error information or further instructions.

To select another PI for approval, return to the Status window, click on another row/PI and click on the Approve Single PI's tab (G).

H. Approve Agy/Pgm

This window allows you to approve all complete PI's for the selected agency or program. Use the Agency (C) or Program (D) tab to drill down to the level you wish to approve. If you are at the agency level, you will only have the option of approving the completed PI's for the entire agency. If you have drilled down to a program level, radio buttons will allow you to choose between the agency approval level and the program that you previously selected on the Program tab (D).

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11 Executive Department (2002)
07 Division of Administration (2002)
A Executive Administration (2002)
Through the Office of Statewide Reporting and Accounting Policy, to complete 80% of the steps necessary to complete the Comprehensive Annual
Inancial Report (CAFR) according to statutory requirements (R.S. 39.80). (2002)
Percentage of Comprehensive Annual Financial Report (CAFR) produced
LogOn Department Agency Program Objective Status Approve Single PI's Approve Agy/Pgm PI's Analyze Information
C Approve all complete Pfs for entire Agency (Incomplete Pfs will not be approved)
C Approve all complete Pfs for entire Program (Incomplete Pfs will not be approved)
Approve

When the Approve button is clicked, a popup message will display asking you to confirm that you wish to approve the all the PI's for the selected agency or program. Click ok to confirm. You will receive a message below the Approve button confirming that the agency or program has been approved.

Only completed PI's will be approved. Once incomplete PI's are completed, this process may be repeated.

I. Analyze

This tab allows the agency approver to see in detail or summary form the PI's meeting, exceeding or falling short of targets. This analysis is provide at the agency level only.

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Once the window opens, click the **Retrieve** button to populate the window with the agency's PI's. Each row is a PI and information is provided in ten columns: Quarterly variance data is display in the first four columns. Column five contains the final variance for the year. The rest of the columns show the PI level, agency number, program, objective and PI number respectively.

Click the **Count** button to populate the summary variance field with the number of PI's that had positive variances, break even, or negative variances. Note that the break even row may contain incomplete PI's where no variance has been calculated.

J. Information

This tab provides information pertinent to the window you are working with prior to clicking on the Information tab. Basically, it provides the same information in this guide.

