

# Set Up Your Fiscal Year Budget

Learn about Purchase Orders and the tasks required to set up your new Fiscal Year Budget.

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## Before We Begin

To create and modify budgets, one or more of the following PASSPort user roles are required: **Vendor Admin**, **Vendor Financials L1**, or **Vendor Financials L2**.

**The Vendor Admin wants to confirm that the user has the necessary task authorizations:**

1. Go to [nyc.gov/passport](https://nyc.gov/passport) and click the **PASSPort Login** button.
2. Click the **Contacts** tab on the left side of the Vendor Profile.
3. Locate the user in the **Vendor Contact Information** section. Make sure the user is listed as a contact with the correct email address, and in the Profile column they have one of the required roles listed above.
4. Then, on the top navigation menu of PASSPort, click **Contracts**, and click **Manage My Contracts**. Find the contract with the budget to be created or modified and click the **pencil** icon to the left of the contract listing.
5. Click the **Setup Team** tab located on the left-side in the Contract. In the **Vendor Team** section, make sure the user is listed as a contact. If they are listed, the user can proceed to create or modify the budget. If they are not listed, see the **Add or Delete Contacts** section of this guide for instructions: **Edit the Vendor Team**.

## 1. Budget Setup Basics: What You Need to Know

Setting up a budget in PASSPort can involve completing specific steps based on how your contracting agency has configured your budget. There are three possible budget setup paths:

- **Vendor Creates the Budget:** Commonly used for most Human/Client Service (also known as Health and Human Service/HHS) contracts. When it's time to complete the budget, vendors receive a **Vendor Budget Completion** task in PASSPort, along with an email notification. **Note:** For HHS contracts, the **Industry** field in the Contract Header section will display "Human/Client Service."
- **Agency Creates the Budget, Vendor Finalizes It:** Agencies create the initial budget and notify vendors when it's time to finalize it by submitting a **Purchase Order Change Request (POCR)** to break down the budget into detailed budget lines.
- **Agency Creates the Budget (No Vendor Action Required):** This option is usually reserved for contracts where the budget details are not managed in PASSPort such as for large construction contracts. **No vendor action is required.**

## 2. Easily Determine Your Budget Tasks

In addition to receiving prompts from your contracting agency to complete your budget, you can easily determine what your organization needs to do by following these steps:

Open your **Purchase Order (PO)**. Go to the **Budget** tab. Navigate to the **Detailed FY Budget** section. Check if **Budget Lines** are displayed.

- **No Budget Lines Display:** You need to create your budget – see [4. How to Create a Budget](#).

Example: The Detailed FY Budgets section is blank, and it reads “0 Result(s)”, the Total Budgeted Amount field is blank, and the Amount still unallocated field displays the full budget amount.

The screenshot shows the 'Detailed FY Budgets' section of a software interface. At the top, there are buttons for 'Save' and 'Submit to Agency'. Below this is a 'Fiscal Year Budget Information' section with a table:

FY Start Date	FY End Date	FY Budgeted Amount	Invoiced Amount	Remaining Amount	Invoiced Value	Remaining Value
07/01/2025	06/30/2026	830,021.00	0.00	830,021.00	0.00	830,021.00

Below the table, it says '1 Result(s)'. Underneath is the 'Detailed FY Budgets' section, which is currently blank and displays '0 Result(s)'. There are buttons for 'Add Budget Line', 'Duplicate Lines from Previous FY PO', 'Import RFx Items', 'Download Budget', and 'Upload Budget'. A 'Filled in\*' section has radio buttons for 'Percentage' and 'Amount', with 'Amount' selected. A text box next to it shows '\$830021.00' with the label 'Amount still unallocated'. At the bottom right, there is a 'Total Budgeted Amount' field.

- **One or More Budget Lines Display:** You need to finalize the agency-created budget by breaking down the provided budget into individual budget lines – see [5. How to Finalize an Agency-Created Budget](#).

Example: Two budget lines were already created by your contracting agency. The **To be allocated** field lists “0.00%” (or: 0 dollars), indicating that the contracting agency already allocated all of the funds which now need to be reallocated in accordance with the agency’s fiscal guidance.

The screenshot shows the 'Detailed FY Budgets' section with two budget lines. At the top, there are buttons for 'Save', 'Save and Close', 'Close', and 'Submit to Agency'. Below this is a 'Fiscal Year Budget Information' section with a table:

FY Start Date	FY End Date	FY Budgeted Amount	Invoiced Amount	Remaining Amount
7/1/2023	6/30/2024	1,030.00	0.00	0.00

Below the table, it says '1 Result(s)'. Underneath is the 'Detailed FY Budgets' section, which contains two budget lines. There are buttons for 'Add Budget Line', 'Download Budget', and 'Upload Budget'. A 'Filled in\*' section has radio buttons for 'Percentage' and 'Amount', with 'Percentage' selected. A text box next to it shows '0.00%' with the label 'To be allocated'. Below this is a table of budget lines:

Sub-Budget	Item Category	Sub Item Category	Budget Line Item	Additional Information	Expected Delivery Date	Invoicable?	Quantity	Unit Price	Budgeted Amount
	Accounting Costs		test			<input checked="" type="checkbox"/>	1.03	500.00	515.00
	Accounting Costs		1			<input checked="" type="checkbox"/>	1.03	500.00	515.00

### 3. What are Purchase Orders?

Before diving into all things budget-related, especially if you're new to PASSPort, here are a few key things to know about Purchase Orders (POs):

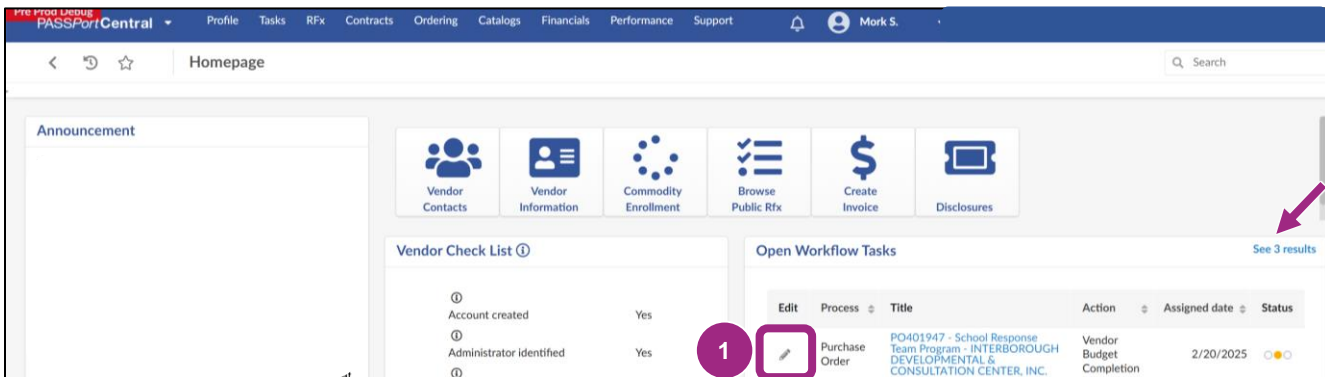
- The PO represents the contract budget for a fiscal year. There will be a new PO for every fiscal year of your contract.
- Fiscal Years (FY) begin July 1<sup>st</sup> and end June 30<sup>th</sup> for the City of New York.
- Multiple POs may be issued, depending on your contract term.

### 4. How to Create a Budget (Vendor Creates the Budget)

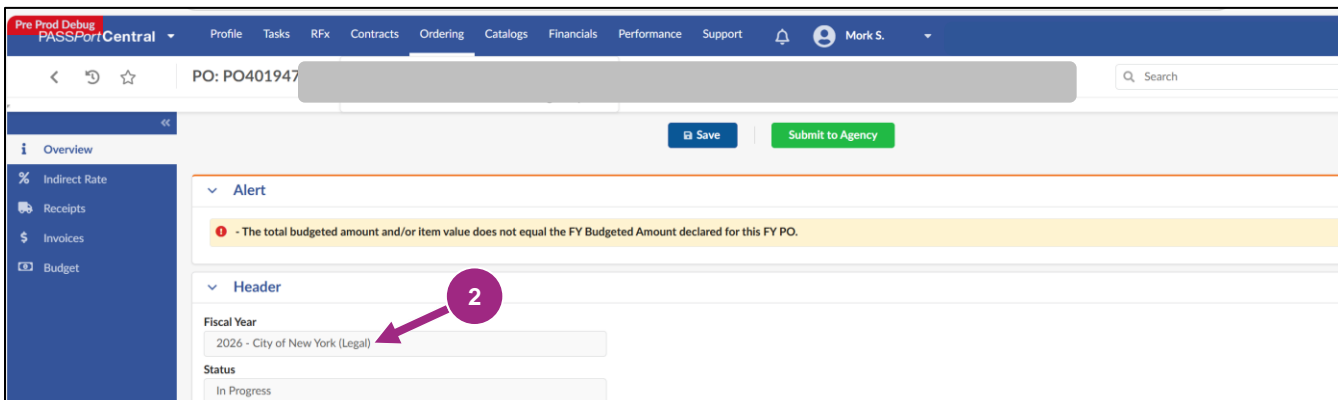
Complete the Vendor Budget Completion Task as soon as the Fiscal Year PO becomes available.

#### 4.1. Open the Vendor Budget Completion Task

1. Click the **pencil** icon to access the Vendor Budget Completion task via the Open Workflow Tasks widget on the homepage. Don't see the task? Click the hyperlink above the table to view all tasks (Example: "See 3 results")



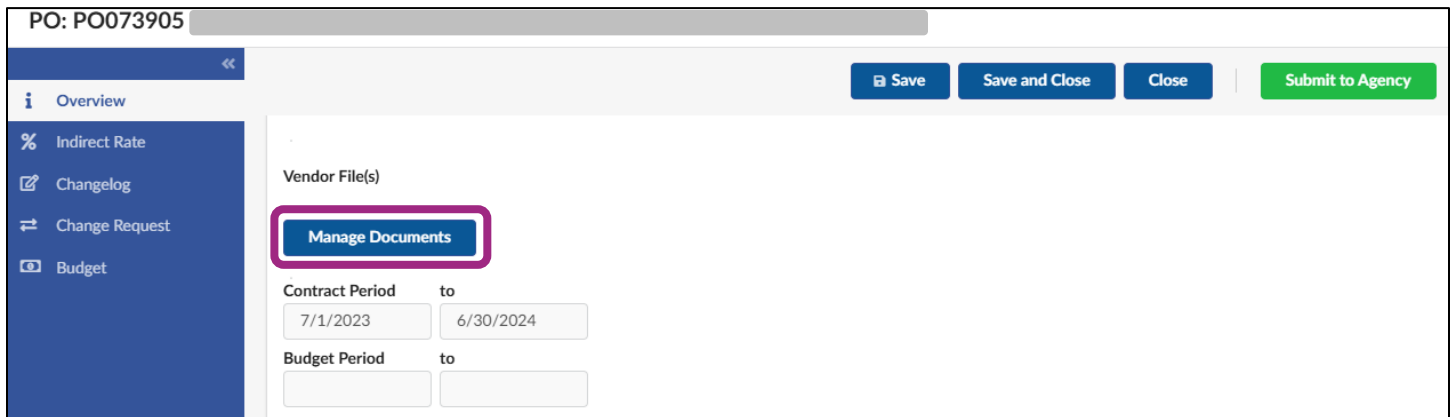
2. The Purchase Order (PO) displays with an In Progress status and an alert that indicates it's time to create the budget. Review the PO details in the Overview tab, including making sure the correct **Fiscal Year** displays.



## 4.2. Upload Required Documentation

Refer to your contracting agency's fiscal guidance if backup documentation is required.

If supporting documentation is required: In the Overview tab of the Purchase Order, click the **Manage Documents** button to upload required documents. Follow the prompts. The file size limit is 300MB.



PO: PO073905

Save Save and Close Close Submit to Agency

Overview

Indirect Rate

Changelog

Change Request

Budget

Vendor File(s)

**Manage Documents**

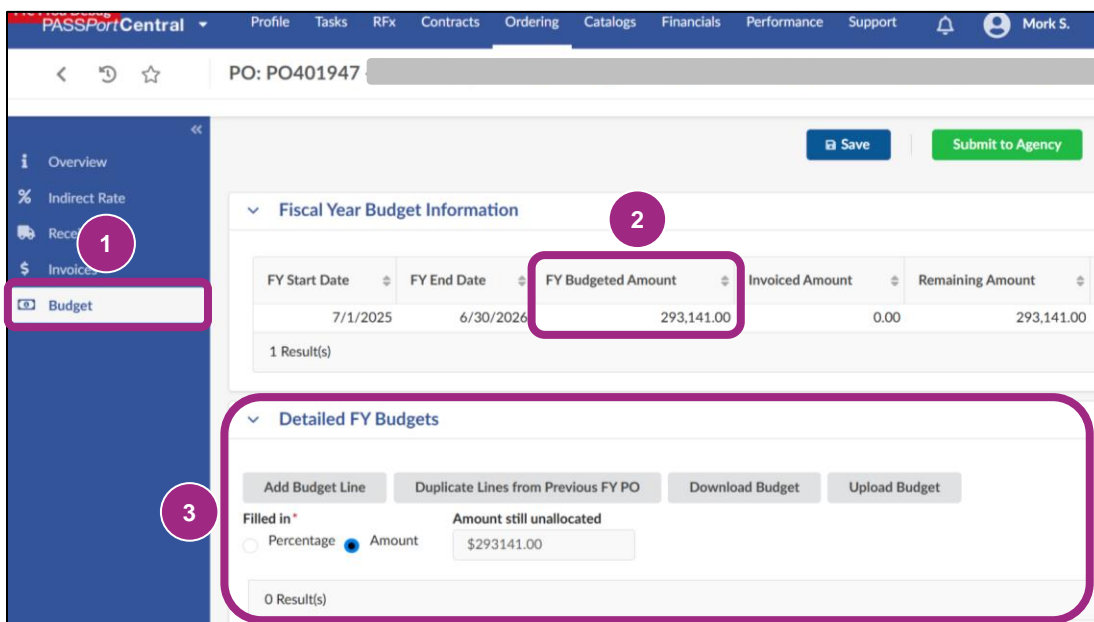
Contract Period to

7/1/2023 6/30/2024

Budget Period to

## 4.3. Review the Budget Information

1. Click the **Budget** tab of the PO. The budget displays.
2. Note the **FY Budgeted Amount** in the Fiscal Year Budget Information section. The full amount must be allocated when filling out the budget.
3. Scroll down to the **Detailed FY Budgets** section to begin filling out your new budget.



PASSPortCentral Profile Tasks RFX Contracts Ordering Catalogs Financials Performance Support Mork S.

PO: PO401947

Save Submit to Agency

Overview

Indirect Rate

Receipts

Invoices

**Budget**

**1**

**2**

Fiscal Year Budget Information

FY Start Date	FY End Date	FY Budgeted Amount	Invoiced Amount	Remaining Amount
7/1/2025	6/30/2026	293,141.00	0.00	293,141.00

1 Result(s)

**3**

Detailed FY Budgets

Add Budget Line Duplicate Lines from Previous FY PO Download Budget Upload Budget

Filled in \* Amount still unallocated

Percentage Amount \$293141.00

0 Result(s)

## 4.4. Add Budget Lines

For your convenience, there are **three different methods to add line items** to your budget.

Choose one or more of the following methods to add budget lines:

**A. Add Budget Line:** Add lines manually, one by one.

**B. Duplicate Lines from Previous FY PO:** Only available if previous FY PO exists. Efficient when budgets don't change much between fiscal years. This automatically copies over all lines from the previous fiscal year budget. Once copied over, you can edit the entries.

**C. Download Budget Template and Upload Budget:** Ideal for bulk entries. Download the budget template, complete it offline in Excel, and then upload the finalized version to PASSPort.

The screenshot displays the PASSPortCentral web application interface. The top navigation bar includes links for Profile, Tasks, RFX, Contracts, Ordering, Catalogs, Financials, Performance, Support, and a user profile for Mork S. The main content area is titled 'PO: PO401947' and features a 'Save' button and a 'Submit to Agency' button. A sidebar on the left lists navigation options: Overview, Indirect Rate, Receipts, Invoices, and Budget. The main content area is divided into sections. The 'Fiscal Year Budget Information' section contains a table with the following data:

FY Start Date	FY End Date	FY Budgeted Amount	Invoiced Amount	Remaining Amount
7/1/2025	6/30/2026	293,141.00	0.00	293,141.00

Below this table, there are three buttons labeled A, B, and C, each enclosed in a purple box. Button A is 'Add Budget Line', Button B is 'Duplicate Lines from Previous FY PO', and Button C is 'Download Budget' and 'Upload Budget'. Below these buttons, there is a 'Filled in\*' section with radio buttons for 'Percentage' and 'Amount' (selected), and a text input field containing '\$293141.00'. The bottom of the section shows '0 Result(s)'.

## A. Add Budget Line

1. Click the **Add Budget Line** button. The Add Budget Line window opens.

2. The Add Budget Line window is where you enter the budget line details:

<b>Item Category</b>	Select the appropriate category to define the deliverable of the budget line. <b>Note:</b> If a category is not listed in the drop-down, select "Other" instead. Keep in mind that for Human Client Service contracts, selecting the correct item category is crucial because the indirect rate calculation is driven by the information entered in the item category.
<b>Sub Item Category</b>	While this is an optional field, some agencies require that you complete this field. Refer to agency guidance.
<b>Budget Line Item</b>	Provides further detail to the deliverable. Type in a label.
<b>Quantity</b>	The amount budgeted towards the goods or services described by the line.
<b>Unit Price</b>	Should always be "1", unless it is a rate-based line such as wages. <b>Note:</b> Once you enter the unit price and submit, it cannot be edited.

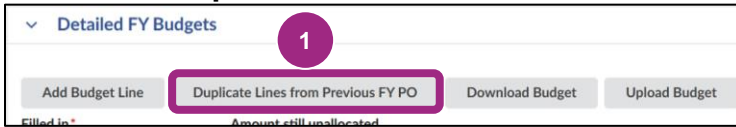
3. Click the **Save and Close** button.

### Important:

- The **Unit Price** should always be "1" unless it's an hourly rate.
- When budgeting **wages**, enter the projected number of hours to be performed in the Quantity field and enter the hourly wage in the Unit Price field. For **salaried** full-time employees, in contrast, enter in the full dollar amount in the Quantity field and enter "1" in the Unit Price field.
- The **Item Value** field should always be left blank.
- The checkbox next to **Invoiceable?** is not editable. That's because the agency will have the final say on which lines will be marked invoiceable after you submit the budget.

## B. Duplicate Lines from Previous FY PO

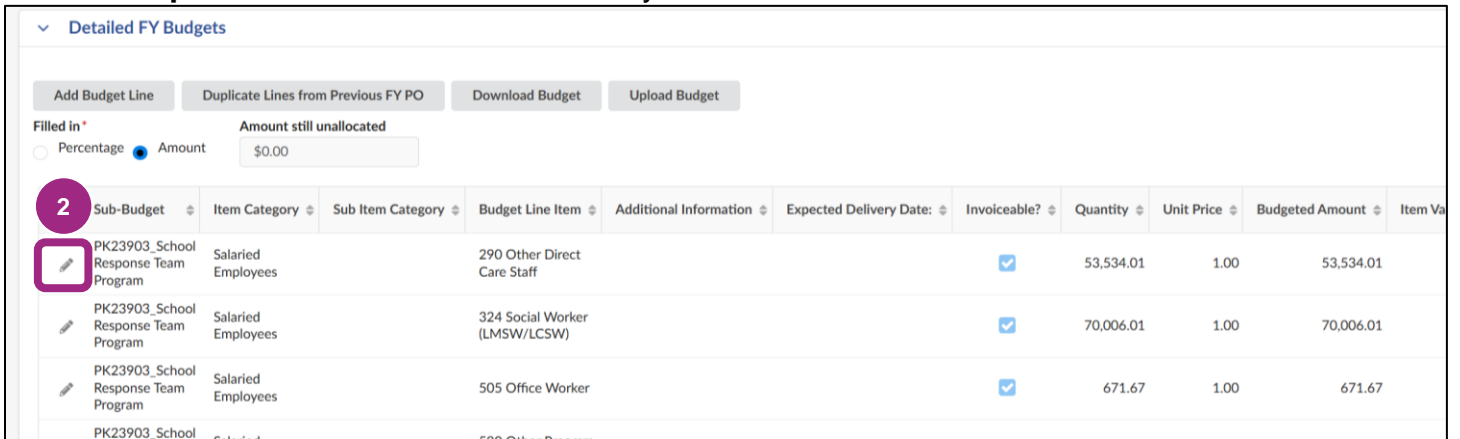
1. Click the **Duplicate Lines from Previous FY PO** button.



The screenshot shows the 'Detailed FY Budgets' header with a dropdown arrow. Below it are four buttons: 'Add Budget Line', 'Duplicate Lines from Previous FY PO', 'Download Budget', and 'Upload Budget'. The 'Duplicate Lines from Previous FY PO' button is highlighted with a red circle containing the number 1. Below the buttons, there are two input fields: 'Filled in \*' and 'Amount still unallocated'.

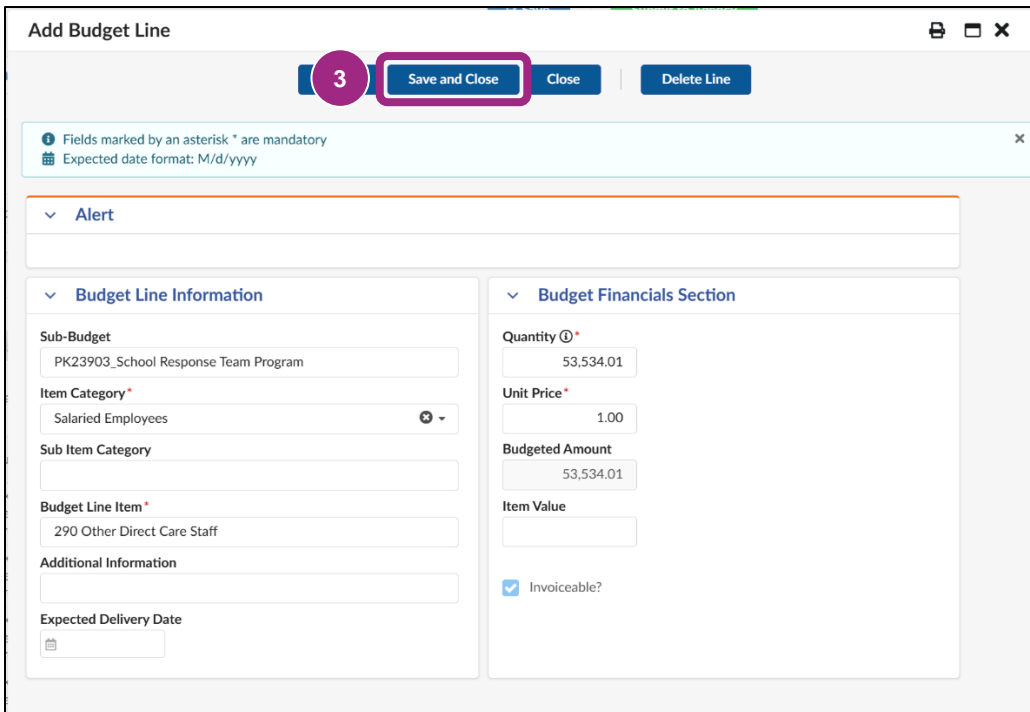
As a result, all budget lines from the prior fiscal year's PO are copied to the current budget.

2. Click the **pencil** icon to view and/or edit any line item.



The screenshot shows the 'Detailed FY Budgets' interface with a table of budget lines. The table has columns: Sub-Budget, Item Category, Sub Item Category, Budget Line Item, Additional Information, Expected Delivery Date, Invoiceable?, Quantity, Unit Price, Budgeted Amount, and Item Value. The first row is highlighted with a red circle and the number 2, and a pencil icon is visible next to it. The first row contains: PK23903\_School Response Team Program, Salaried Employees, 290 Other Direct Care Staff, 53,534.01, 1.00, 53,534.01. The second row contains: PK23903\_School Response Team Program, Salaried Employees, 324 Social Worker (LMSW/LCSW), 70,006.01, 1.00, 70,006.01. The third row contains: PK23903\_School Response Team Program, Salaried Employees, 505 Office Worker, 671.67, 1.00, 671.67.

3. Make the necessary edits then click the **Save and Close** button. Optional: To remove any unnecessary lines from the budget, click the **Delete Line** button and follow the prompts.



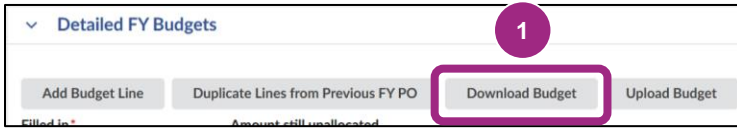
The screenshot shows the 'Add Budget Line' form. At the top right, there are three buttons: 'Save and Close', 'Close', and 'Delete Line'. The 'Save and Close' button is highlighted with a red circle and the number 3. Below the buttons, there is a message box: 'Fields marked by an asterisk \* are mandatory. Expected date format: M/d/yyyy'. The form is divided into two sections: 'Budget Line Information' and 'Budget Financials Section'. The 'Budget Line Information' section contains fields for Sub-Budget, Item Category, Sub Item Category, Budget Line Item, Additional Information, and Expected Delivery Date. The 'Budget Financials Section' contains fields for Quantity, Unit Price, Budgeted Amount, Item Value, and an 'Invoiceable?' checkbox.

To add individual budget lines, refer to the instructions listed in **A. Add Budget Line**.

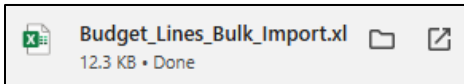


## C. Download Budget Template and Upload Budget

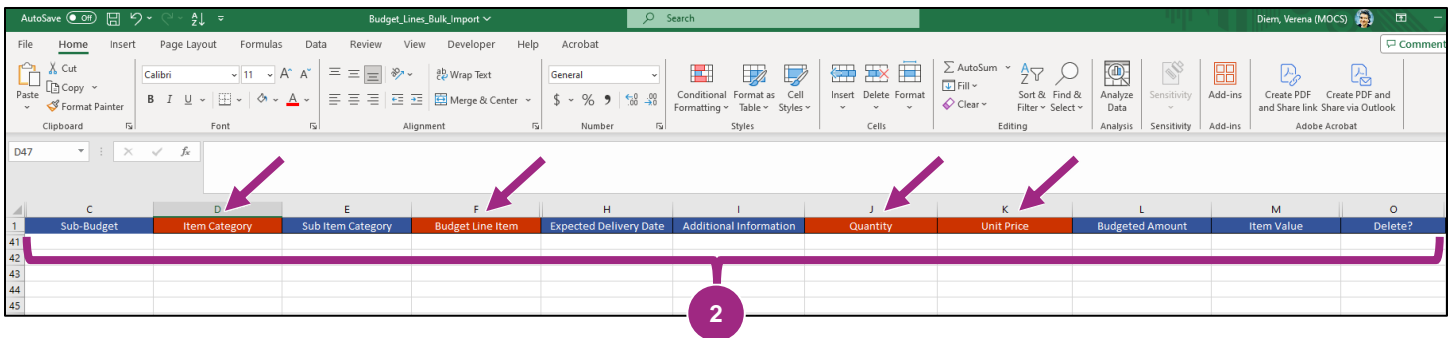
1. Click the **Download Budget** button.



A template will download to your computer. Don't see it? Check your Download folder and make sure there are no pop-up blockers set up in your web browser.



2. Open the Excel file and enter budget line information according to the column labels. Columns marked in **red** indicate required fields. Save the file to your computer.



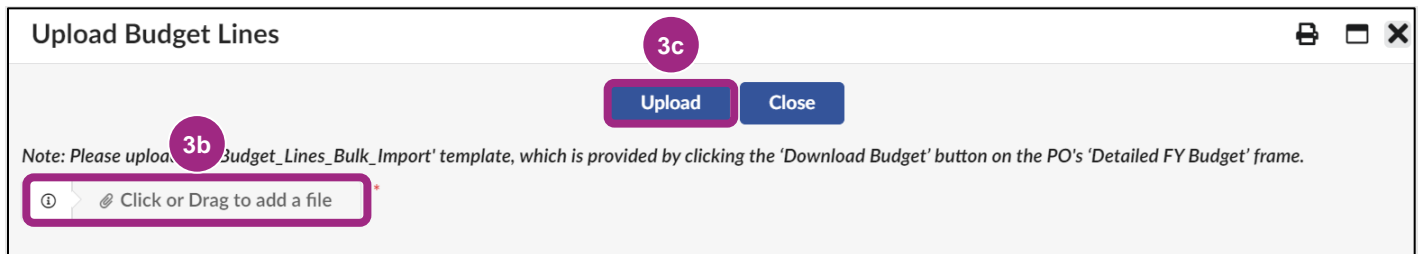
3. Upload the spreadsheet to PASSPort:

a. Click the **Upload Budget** button.



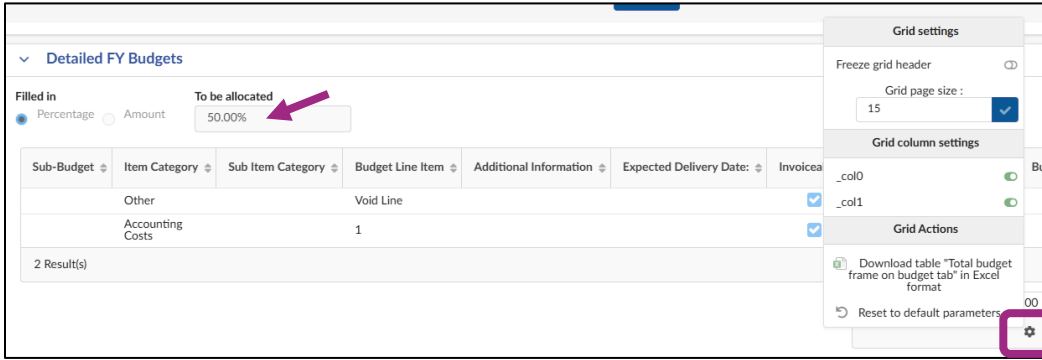
b. **Click or Drag to add a file** to add the budget template file and follow the prompts.

c. Click the **Upload** button.



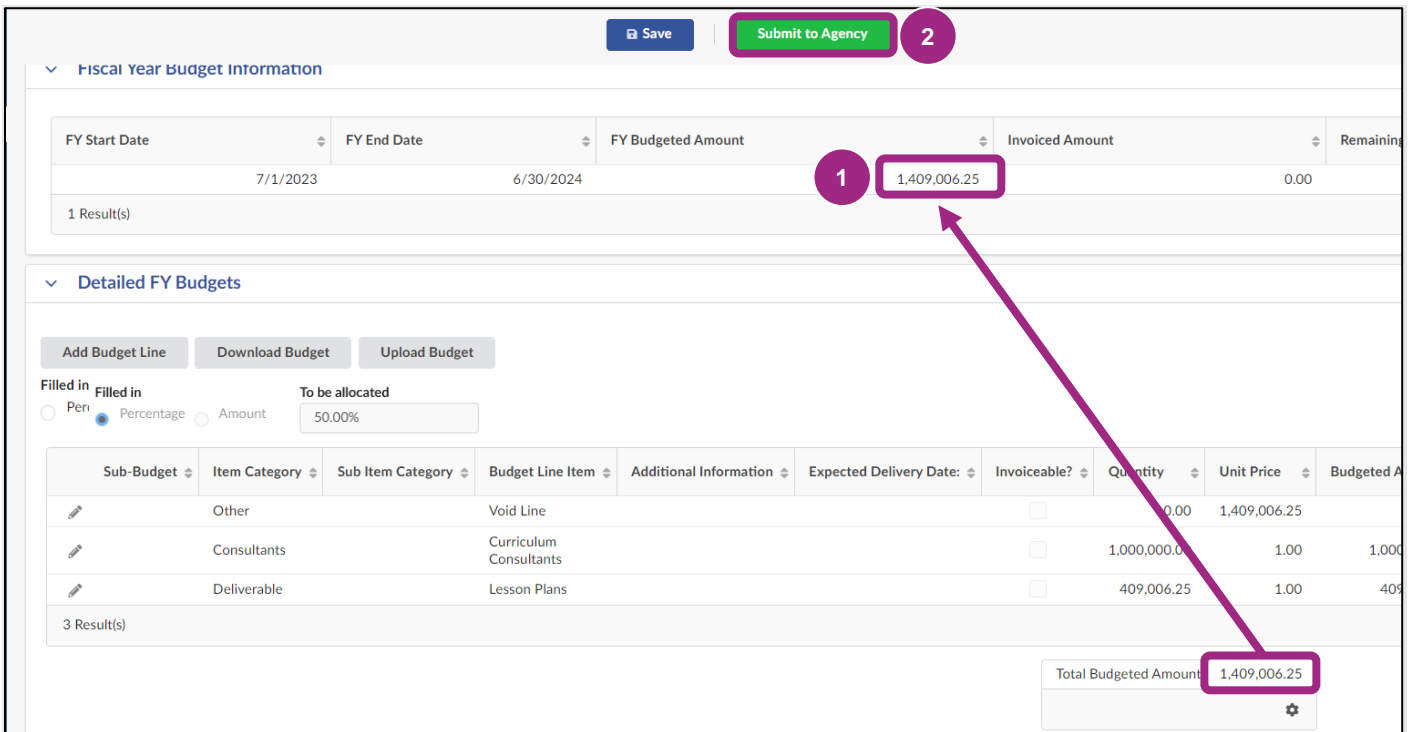
To add individual budget lines, refer to the instructions listed in **A. Add Budget Line**.

**Tip:** Keep an eye on the **To be allocated field**—it shows the remaining budget you still need to allocate. Optional: Click the **gear** icon to download the table's contents for your records.



## 4.5. Submit the Budget

1. Take a moment to ensure that the **Total Budgeted Amount** is the same as the **FY Budgeted Amount**.
2. Click the **Submit to Agency** button at the top of the page.



3. Look out for this validation message. It confirms successful budget submissions.

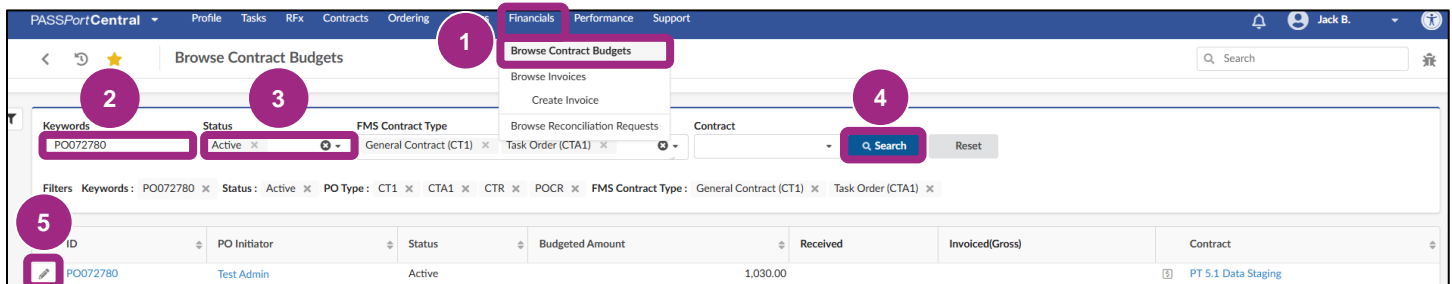


## 5. How to Finalize an Agency-Created Budget (Agency Creates the Budget and the Vendor Finalizes It)

Submit a POCR to finalize an agency-created budget.

### 5.1 Find the Purchase Order

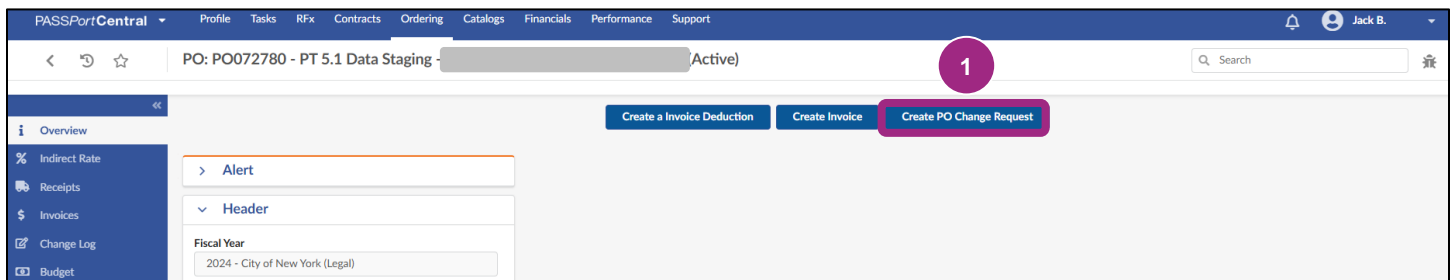
1. Click **Financials** on the top navigation menu and select **Browse Contract Budgets** from the drop-down.
2. In the **Keywords** text field, enter the Purchase Order ID (PO ID). If you do not know the PO ID, you may enter other search options such as the Contract ID.
3. In the Status field, remove the In Progress and Registered filter, so that only **Active** displays.
4. Click the **Search** button. Results matching your criteria will appear in a table below the search fields.
5. In the search results, click the **pencil** icon or the PO ID link to open the Purchase Order (PO).



### 5.2 Create the Purchase Order Change Request (POCR)

Since your contracting agency has already created and approved an initial budget for you, a POCR needs to be created to finalize the budget.

1. Click the **Create PO Change Request** button at the top of the page.



The Select Purchase Change Request Type page will display.

**Note:** If the **Create PO Change Request** button does not display, it may be due to:

- You might not have a required user role. See [Before We Begin](#) of this guide for details.
- The contracting agency might not have (or not yet) enabled vendor-submitted budgets.
- A Purchase Order Change Request (POCR) may already in progress. Previously initiated POCRs can be found by clicking on **Change Log** on the left-side navigation. Submit any pending POCRs or send your contract agency a request to cancel.

2. Click the Select the PO Change Request Type drop-down and select the option: **Budget Change Only**.

3. In the **Change Request Reason** text field, enter a reason for the change request. In this example, we're looking to create a budget and entered "Create Budget".

4. Click the **Submit** button at the top of the page.

4

Submit Back

Fiscal year  
2024 - City of New York (Legal)

Select the PO Change Request Type\*  
Budget Change Only

Change Request Reason\*  
Create Budget

Created PO Change Request

5. When the POCR is created, in the **Created PO Change Request** text field, hyperlinked text will display. Click the **hyperlink**. The Purchase Order (PO) will display.

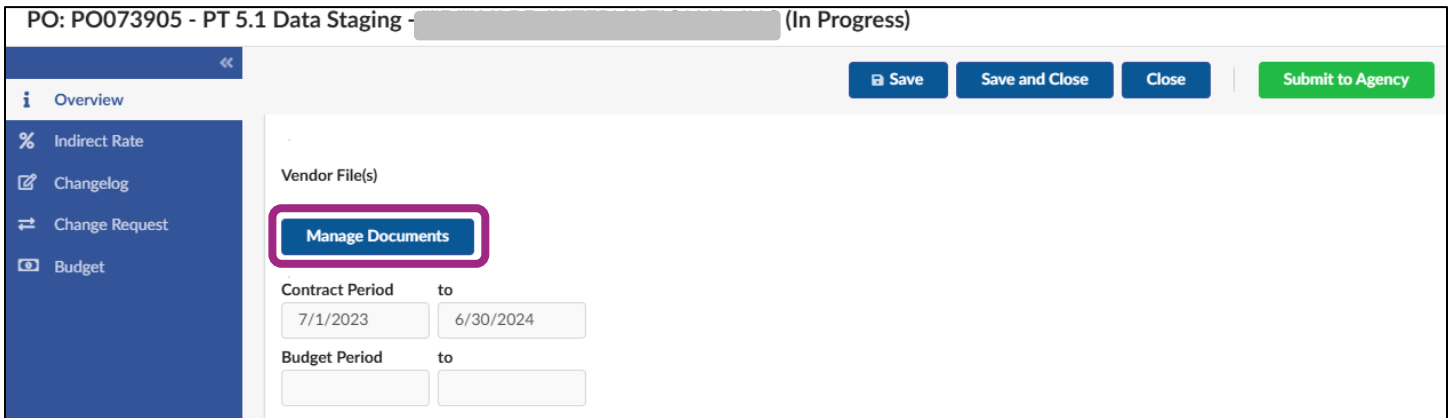
5

PT 5.1 Data Staging

### 5.3. Upload Required Documentation

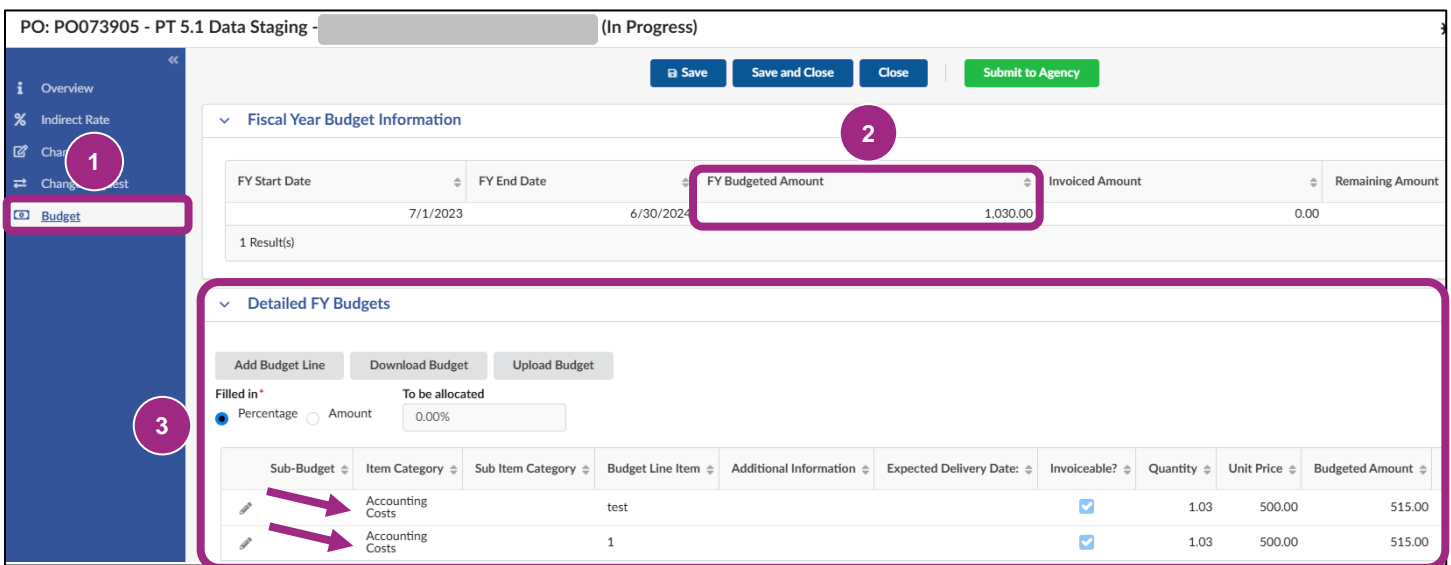
Refer to your contracting agency’s fiscal guidance if backup documentation is required.

If supporting documentation is required: In the Overview tab of the Purchase Order, click the **Manage Documents** button to upload required documents. Follow the prompts. The file size limit is 300MB.



### 5.4. Review the Budget Information

1. Click the **Budget** tab of the PO. The budget displays.
  2. Note the **FY Budgeted Amount** in the Fiscal Year Budget Information section. The full amount must be allocated when filling out the budget.
  3. Scroll down to the **Detailed FY Budgets** section. This is where you will complete the budget.
- Note:** The existing budget lines were created by your contracting agency. In this example, the Agency already created two pre-existing budget lines for Accounting Costs.



## 5.5. Void Pre-Existing Budget Lines

Before adding new lines to your budget, you will typically need to **void any budget lines** created by your contracting agency. Voiding a budget line simply means noting in the budget line that it is no longer needed, so that the agency can ignore or delete it when approving the budget.

### Do Void Budget Lines:

- When the pre-existing budget line(s) has a Unit Price **greater than** "1".

### Do NOT Void Budget Lines:

- If a pre-existing budget line has a Unit Price **equal to** "1". Edit the line item fields instead.
- For Budget Lines with an Item Category "Allowance" or "Unallocated". Refer to the contracting agency guidance on how to proceed instead.

### How to Void Budget Lines:

1. Go to the **Detailed FY Budgets** section and click the **pencil** icon.

PO: PO073905 - PT 5.1 Data Staging - (In Progress)

Save Save and Close Close Submit to Agency

Add Budget Line Download Budget Upload Budget

Filled in\* To be allocated  
Percentage Amount 0.00%

Sub-Budget	Item Category	Sub Item Category	Budget Line Item	Additional Information	Expected Delivery Date	Invoiceable?
	Accounting Costs		test			<input checked="" type="checkbox"/>

2. Check if the Unit Price is **greater than** "1", which is the case in this example (it displays 500), continue the steps to void the line. If the Unit Price shows "1", however, there's no need to void the line. Instead, simply edit the line item fields as needed.

Add Budget Line

Save Save and Close Close

Alert

Budget Line Information

Sub-Budget

Item Category\* Accounting Costs

Sub Item Category

Budget Line Item\*

Budget Financials Section

Edit By\* Amount Quantity

Quantity 1.03

Unit Price 500.00

Budgeted Amount

3. In the Add Budget Line window, click the **Item Category** field drop-down. The menu will expand.
4. Click the **See All** hyperlink. A separate **Item Category (Budgets)** window will display.

5. Click the **checkbox** to select **Other** from the Item Category list.  
**Tip:** You can also type in the first few letters of the category “Other” to quickly locate it.
6. Click the **Close** button.

7. In the **Budget Line Item** text field, type: "Void Line".
8. Click the **radio button** to select **Quantity**. Do not select Amount.
9. Enter "0" in the **Quantity** field.
10. Click the **Save and Close** button.

**Add Budget Line**

Save Save and Close Close

Alert

**Budget Line Information**

Sub-Budget

Item Category\*  
Other

Sub Item Category

**Budget Line Item\***  
Void Line

**Budget Financials Section**

Edit By\*  
 Amount  Quantity

**Quantity** ⓘ\*  
0.00

Unit Price  
500.00

Budgeted Amount  
0.00

The budget line will update and display as "Void Line", indicating to the contracting agency that you want this line deleted.

**Detailed FY Budgets**

Add Budget Line Download Budget Upload Budget

Filled in\* To be allocated  
 Percentage  Amount 50.00%

Sub-Budget	Item Category	Sub Item Category	Budget Line Item	Additional Information
	Other		Void Line	

Repeat steps, as needed.



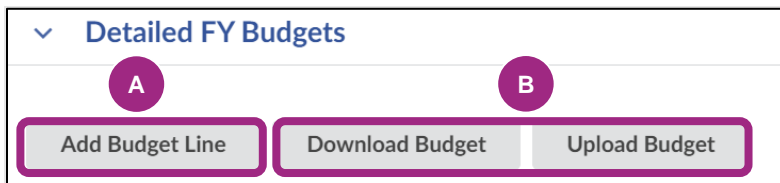
## 5.6. Add Budget Lines

Now it's time to complete the budget by adding new budget lines.

Add budget lines manually or by bulk upload:

**A. Add Budget Line:** Add lines manually, one by one.

**B. Download Budget Template and Upload Budget:** Ideal for bulk entries when creating a new budget. Download the budget template, complete it offline in Excel, and then upload the finalized version to PASSPort.



## A. Add Budget Line

1. Click the **Add Budget Line** button.

The screenshot shows a header area with a dropdown menu for 'FY Budgets'. Below the header, there are four buttons: 'Add Budget Line', 'Duplicate Lines from Previous FY PO', 'Download Budget', and 'Upload Budget'. The 'Add Budget Line' button is highlighted with a red border, and a purple circle with the number '1' is placed over it.

2. The Add Budget Line window is where you enter the budget details:

<b>Item Category</b>	Select the appropriate category to define the deliverable of the budget line. <b>Note:</b> If a category is not listed in the drop-down, select Other instead. For Human Client Service contracts, selecting the correct item category is crucial because the indirect rate calculation is driven by the information entered in the item category.
<b>Sub Item Category</b>	While this is an optional field, some agencies require that you complete this field. Refer to agency guidance.
<b>Budget Line Item</b>	Provides further detail to the deliverable. Type in a label.
<b>Quantity</b>	The amount budgeted towards the goods or services described by the line.
<b>Unit Price</b>	Should always be “1”, unless it is a rate-based line such as wages. <b>Note:</b> Once you enter the unit price and submit, it cannot be edited.

### Important:

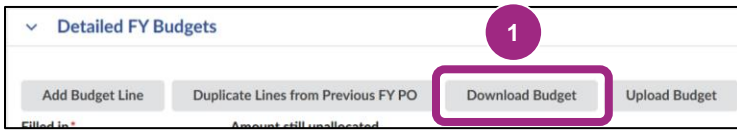
- The **Unit Price** should always be “1” unless it's an hourly rate.
- When budgeting **wages**, enter the projected number of hours to be performed in the Quantity field and enter the hourly wage in the Unit Price field. For **salaried** full-time employees, in contrast, enter in the full dollar amount in the Quantity field and enter “1” in the Unit Price field.
- The **Item Value** field should always be left blank.
- The checkbox next to **Invoiceable?** is not editable. That’s because the agency will have the final say on which lines will be marked invoiceable after you submit the budget.

3. Click the **Save and Close** button.

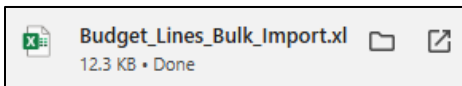
The screenshot shows the 'Add Budget Line' window. At the top, there are four buttons: 'Save', 'Save and Close', 'Close', and 'Delete Line'. The 'Save and Close' button is highlighted with a red border, and a purple circle with the number '3' is placed over it. Below the buttons, there are two sections: 'Budget Line Information' and 'Budget Financials Section'. The 'Budget Line Information' section contains fields for 'Sub-Budget', 'Item Category', 'Sub Item Category', and 'Budget Line Item'. The 'Budget Financials Section' contains fields for 'Quantity', 'Unit Price', 'Budgeted Amount', and 'Item Value'. A red bracket highlights the 'Item Category', 'Sub Item Category', and 'Budget Line Item' fields, and a purple circle with the number '2' is placed over the bracket.

## B. Download Budget Template and Upload Budget

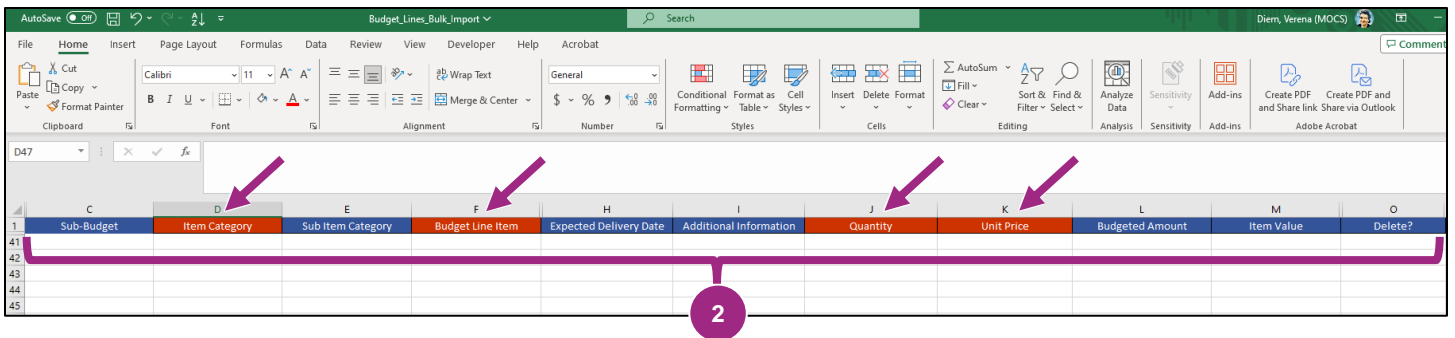
1. Click the **Download Budget** button.



A template will download to your computer. Make sure there are no pop-up blockers set up in your web browser.



2. Open the Excel file and enter budget line information according to the column labels. Columns marked in **red** indicate required fields. Save the file to your computer.



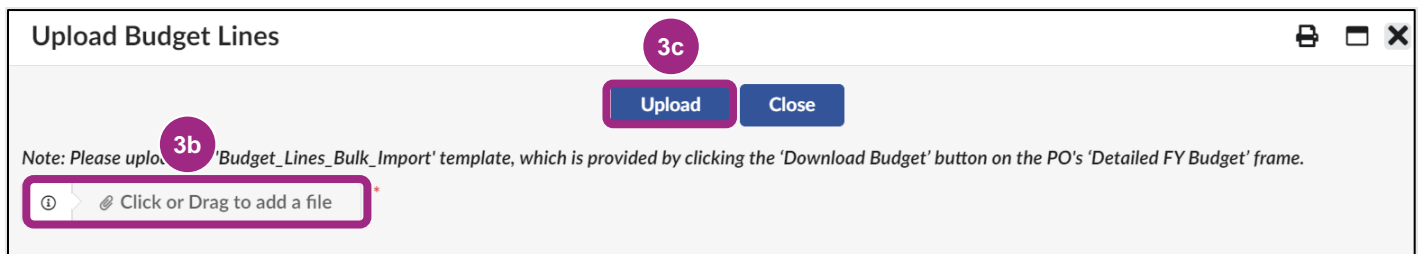
3. Upload the spreadsheet in PASSPort:

a. Click the **Upload Budget** button.



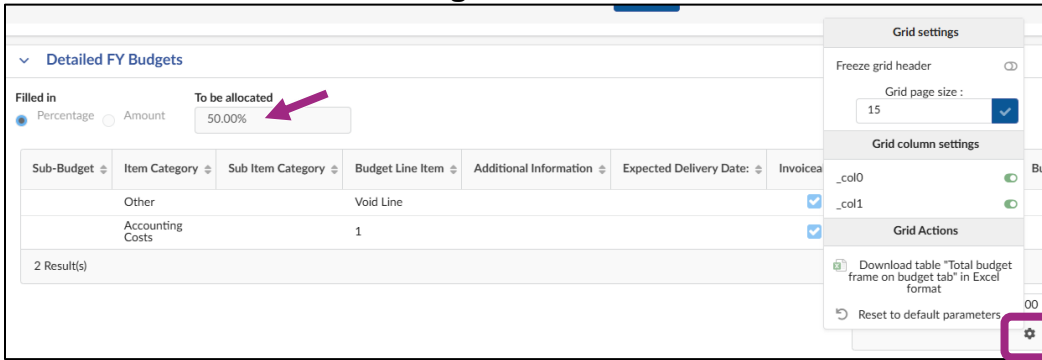
b. Click the **Click or Drag to add a file** button to add the budget template file and follow the prompts.

c. Click the **Upload** button.



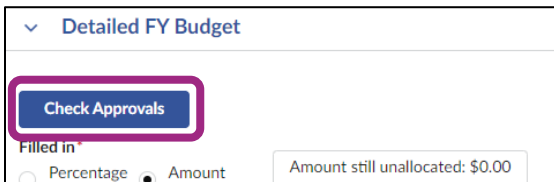
To add individual budget lines, refer to the instructions listed in **A. Add Budget Line**.

**Tip:** Keep an eye on the **To be allocated field**—it shows the remaining budget you still need to allocate. You can also click the **gear** icon to download the table's contents for your records.



## 5.7. Check Approvals

For POCRs, in the Detailed FY Budget section, the **Check Approvals** button displays. You can use it to check if your intended budget changes **qualify for auto-approval**.

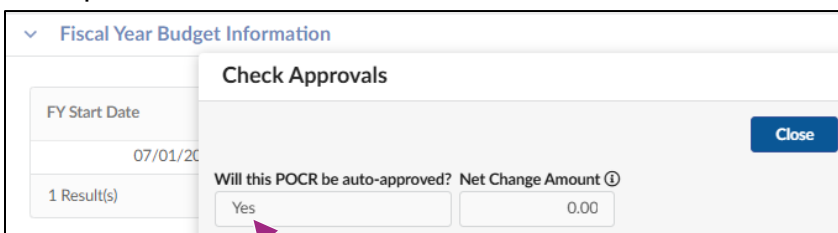


To expedite the approval process, new budget lines valued at **less than 10%** of the total fiscal year budget are typically **auto approved**, meaning they do not require manual approval by your contracting agency. Changes exceeding 10% require manual review and approval by the agency.

Click the **Check Approvals** button to view whether the changes qualify for auto-approval:

- **Yes.** This means your changes **do qualify** for auto approval. The changes do not exceed the agency's auto-approval threshold and will be auto approved in PASSPort, meaning manual approval by your contracting agency is not required. **Note:** If the initial POCR doesn't use the full threshold amount, the remaining balance can be applied to another budget-only POCR.
- **No.** This means your changes **do not qualify** for auto approval. The changes exceed the agency's auto-approval threshold which means that manual budget approval is required by the contracting agency.

Example:

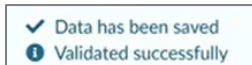


## 5.8. Submit the Budget

1. Take a moment to ensure that the **Total Budgeted Amount** is the same as the **FY Budgeted Amount**.
2. Click the **Submit to Agency** button at the top of the page.

The screenshot shows a web interface for budget submission. At the top, there are buttons for 'Save' and 'Submit to Agency'. Below this is a section titled 'Fiscal Year Budget Information' containing a table with columns for 'FY Start Date', 'FY End Date', 'FY Budgeted Amount', 'Invoiced Amount', and 'Remaining'. The 'FY Budgeted Amount' is set to 1,409,006.25. Below this is a 'Detailed FY Budgets' section with buttons for 'Add Budget Line', 'Download Budget', and 'Upload Budget'. It includes a 'Filled in' section with radio buttons for 'Per', 'Percentage', and 'Amount', and a 'To be allocated' field set to 50.00%. A table below lists budget line items with columns for 'Sub-Budget', 'Item Category', 'Sub Item Category', 'Budget Line Item', 'Additional Information', 'Expected Delivery Date', 'Invoicable?', 'Quantity', 'Unit Price', and 'Budgeted Amount'. The items are 'Void Line', 'Curriculum Consultants', and 'Lesson Plans'. At the bottom right, a 'Total Budgeted Amount' field is highlighted with a purple box and contains the value 1,409,006.25. A purple arrow points from this field back to the 'FY Budgeted Amount' field in the table above.

3. Look out for this validation message. It confirms successful budget submissions.



If the agency **approves** your budget, the POCR status will change to **Registered** and the underlying Active PO will be updated with your changes.

**Note:** Take note of your Active Purchase Order's PO ID. Both Purchase Orders and Purchase Order Change Requests use PO IDs as their unique identifiers. However, invoices can only be made against Active status Purchase Orders.

## 6. Next Steps

- While the **agency is reviewing** your budget, you will not be able to make any additional changes.
- The agency **might return** the budget back to you for additional edits at which point you can resubmit with revisions. You will receive an email notification if the budget was returned for revision.
- Once the budget is approved by the contracting agency, the contract is registered and the PO is Active, and work has begun, you can start to **submit invoices!**

## 7. Best Practices

- **Before Doing Any Work in PASSPort:** Carefully review your contracting agency's fiscal guidance on your Agency's preferences regarding setting up your budget. Make sure your colleagues working on budgets have access to your organization's PASSPort account and are assigned the necessary user role(s) to do the work.
- **Gather Required Documentation:** Review your Agency's fiscal guidance for documentation requirements. Upload required documents before proceeding to budget entry as this step is easily missed.
- **Offline PO ID Tracking:** Record your PASSPort Purchase Order IDs outside of PASSPort – this will help you quickly locate your POs when making future budget modifications. Click the gear icon (located at the bottom-right corner of the Budget tab > Detailed FY Budgets section) to easily download budget details from PASSPort.