OPB

Office of Planning and Budget

"Managing for Results"

LaPAS

Agency Update for Performance Indicators

After selecting the Agency Update option from the LaPAS website, the following window will display. This is the Agency Update Window, which allows state users to update their performance indicators (PI's). This window contains eight tabs.

Always read the message line (L) at the bottom of the window to see instructions and information that will guide you through the update process.
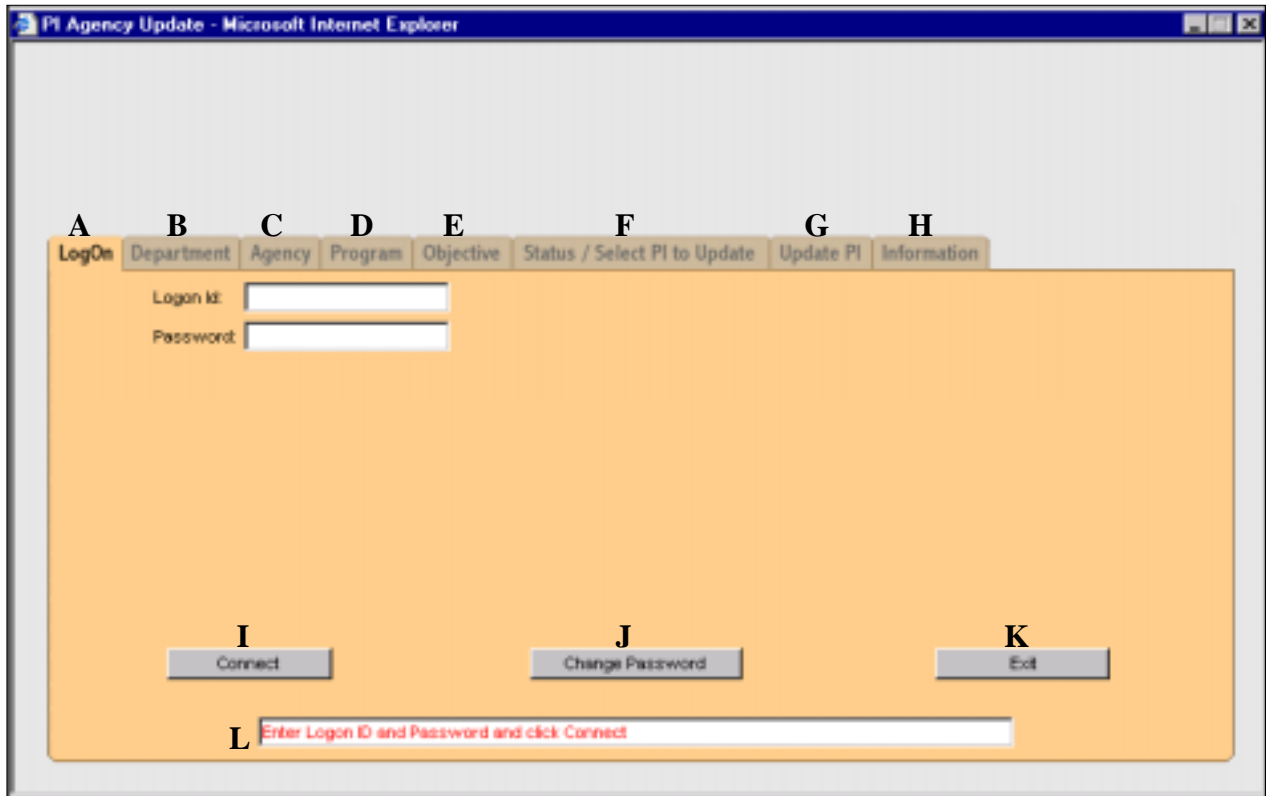

Logon Tab

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 (I). The first time you logon, your logon id and password will be identical. When you click the [Connect] button, the 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.
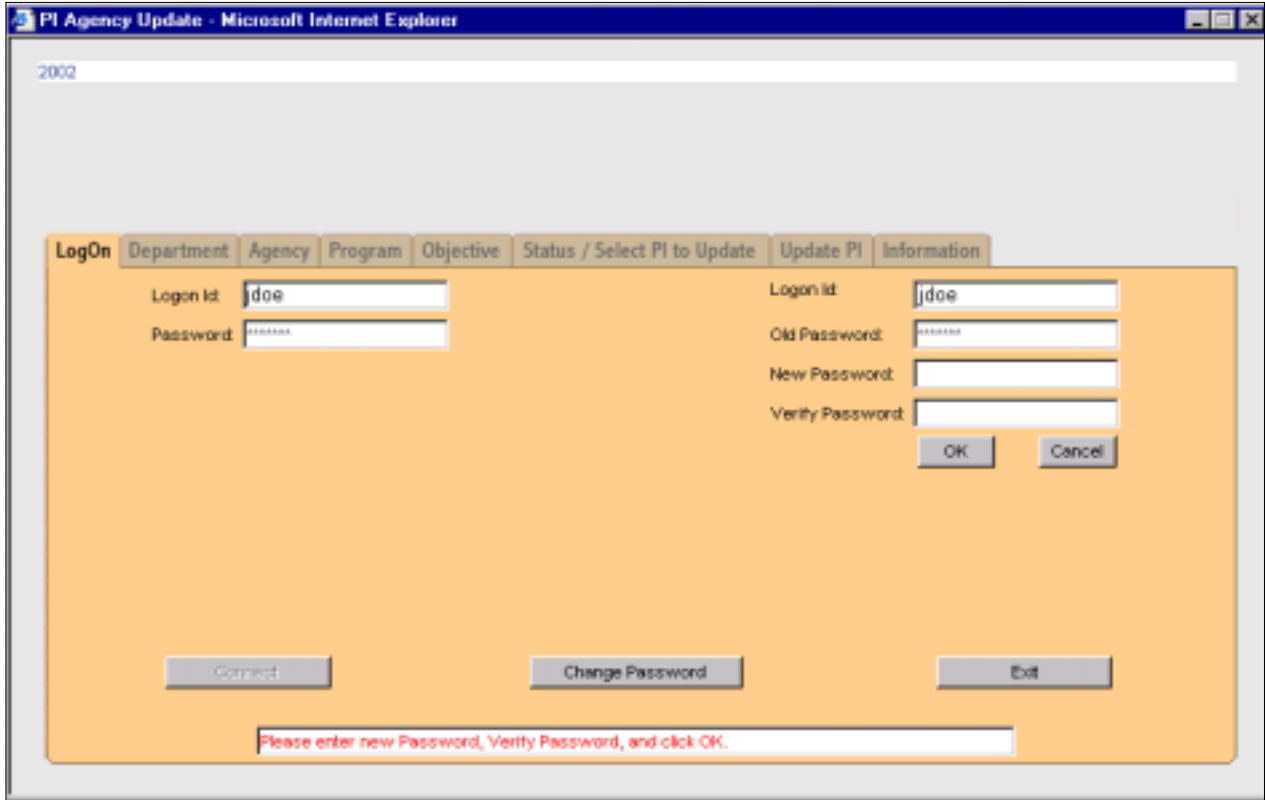
Check the message line for any errors or other messages and follow the directions you see.

Once a successful connection notice appears in the message line, across the top of the window 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.
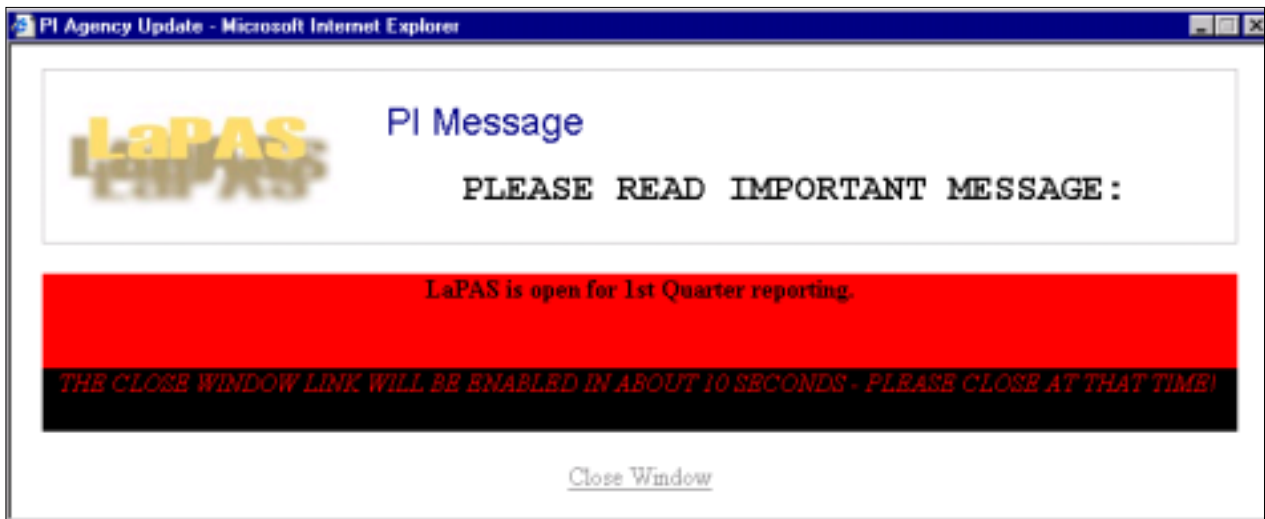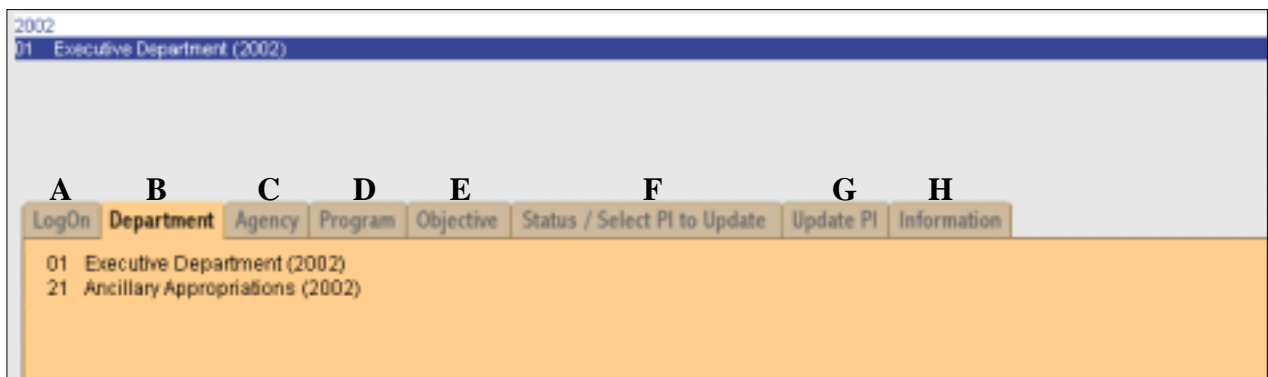
Department Tab

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.

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.


Agency Tab

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

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/Select PI to Update 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).
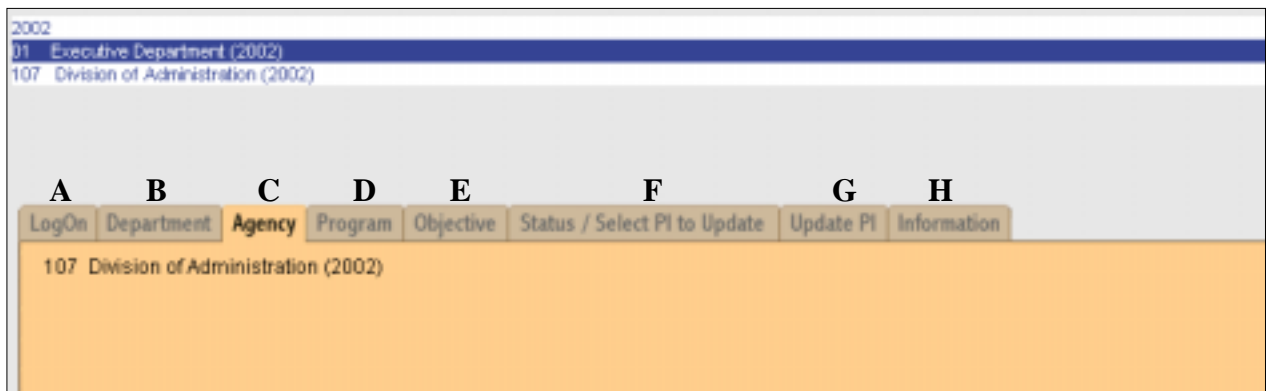
Program Tab

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.
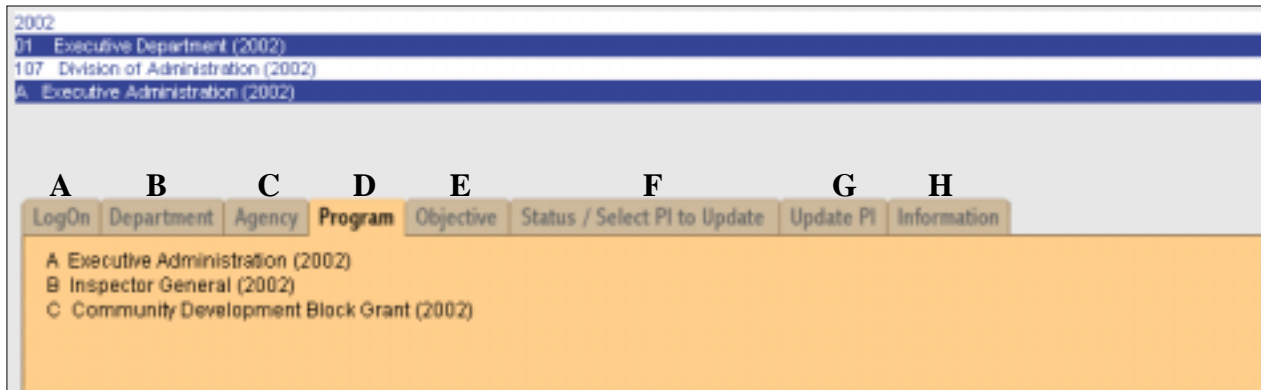
Objective Tab

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.
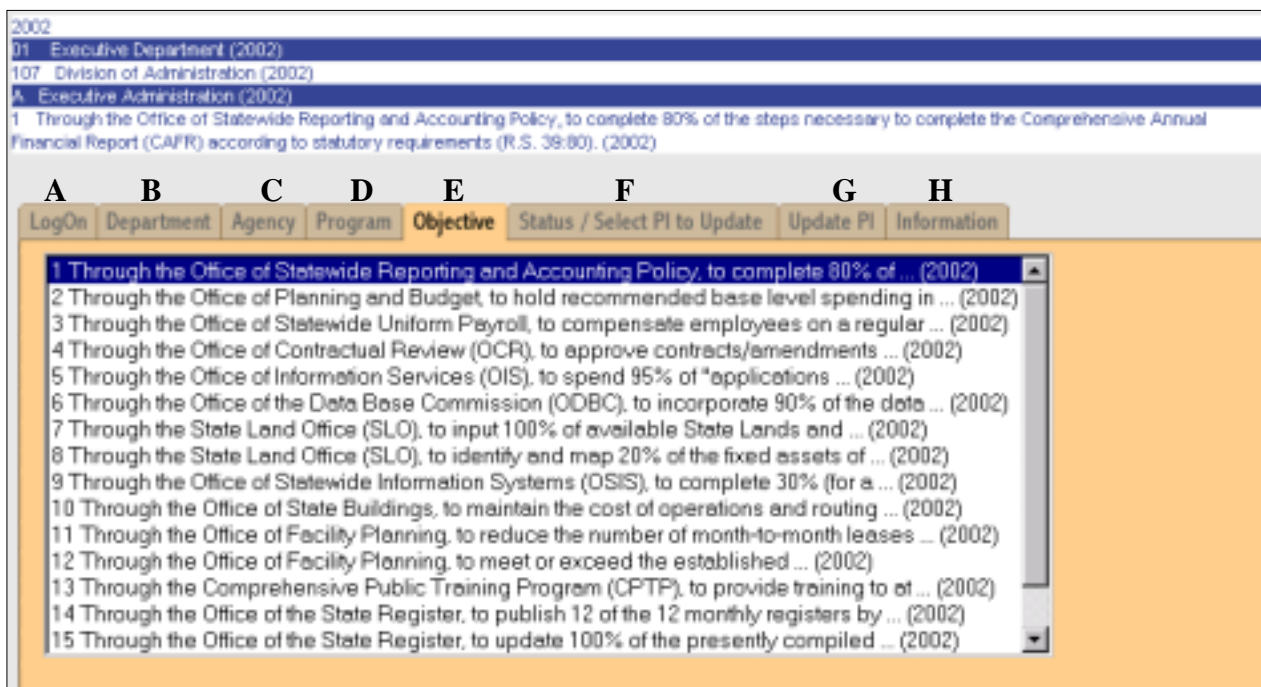
Status/Select PI to Update Tab

The Status/Select PI to Update tab (F) performs two functions:

1.   Checks the status of PI's to determine whether they should be updated.
2.   Selects the PI's that are to be updated.

Determine the PI's that should be updated by viewing the status of each. Click the [Retrieve] button at the bottom of the window to display the PI's for the organization level you selected, ie., agency, program, objective. *(PI's are complete when all information required for that quarter has been entered. Read the Quarterly Performance Progress Report instructions for requirements.)* 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.
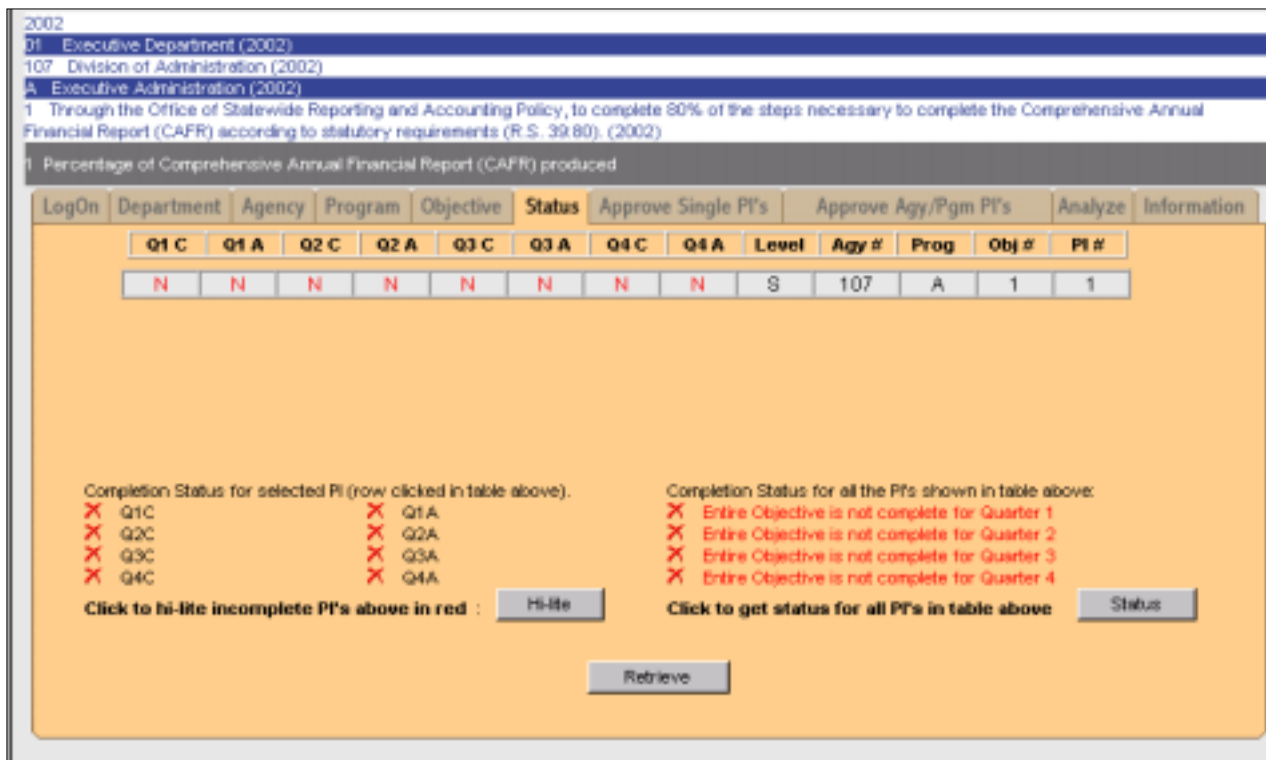
Once retrieved, a number of columns will display for each PI. The first eight columns display the completion and approval status for the PI for each quarter of the fiscal year. For instance, if column Q1 C (Quarter 1 Complete) contains a "Y", the PI is complete for the quarter; "N" indicates incomplete. 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.

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

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 need to be updated, select one by clicking on the appropriate row, highlighting it in white. The PI number and name will also display in the PI header row.

Next, click on the Update PI tab to open the window on which you update the PI..

Update PI Tab

Click the [Retrieve] button to display information for the PI you selected for update on the previous window.

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. Fields on this window that are editable by the agency user will be enabled and highlighted in white. For instance, when the first quarter is to be updated, Q1 Target, Q1 Actual, Q1 Notes, and Q2 – Q4 Targets will be enabled.

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 fourth quarter (or year end) actual and the performance standard.
6. Yearend Notes -- Notes of explanation if the final variance between the performance standard and the actual exceeds five per cent (plus or minus).
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 negative comparison communicates favorable performance.

Note: Make sure the information you enter is consistent with the PI's format. For instance, if PI is millions of dollars (5 million), enter as 5 rather than 5,000,000. If a %,do not use decimals. Also do not enter any indicators such as $, #, or %. This is taken care of in the PI Format field.

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 must be entered 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 in which you can enter comments about that quarters report.

Once all enabled (white) fields have been updated, click the `Prepare` button to calculate the variance and display it in the Var % column. If the variance exceeds 5 %, enter an explanation in the Notes field. Click the `Save` button to update the database with the recorded information.

To select another PI to update, return to the Status/Select PI to Update tab and click on another row (PI). Note that the PI you just updated will reflect an updated status on this window. If the status has not changed, select the PI and return to the Update PI window to check for fields that were not completed.

Continue the process until all the PI's that you are responsible for reporting have been updated.