|  |  |  |
| --- | --- | --- |
| **Agency:**  | **CFO name:**  | **FIN Agency Budget(s) used in FY23:** |
| **CFO phone:**  | **CFO email:**  | **Date Prepared:** |
| **Step 1:** * Select **ONE** of the Track or Control options, only if you are selecting a NEW FIN Agency Budget or if your FIN Agency Budget is CHANGING from what your agency used in FY 2022
* If your Agency Budget Ruleset is not changing from FY 2022, you do not need to complete this form, but please check the translate trees for accuracy for FY 2023.
* Complete Steps 2 through 4 only for the option selected
 | **Step 2:*** Select the Ruleset
 | **Step 3:*** If you are going to set up your Agency Budget using the same Dept values that you transact in FIN, you do not need to do anything for Step 3.
* If you are going to set up your Agency Budget to budget at a higher level of Dept values and transact at a lower level of Dept values, you will need to use a translate tree for your Agency Budget. If you are using a Track budget, you will use the CC\_DEPT\_TRACK tree. If you are using a Control budget, you will use the CC\_DEPT\_CONTROL tree.
* Identify the Dept Values for budgeting in column 3, and Dept values for transacting in column 4.
* Save and name the tree: Your Three Letter Agency Acronym plus DeptBudget plus the date

 (e.g., DYS Dept Budget 5-1-2022)* **Return the highlighted tree with this template**
 | **Step 4:** * If you are going to set up your Agency Budget using the same Program values that you transact in FIN, you do not need to do anything for Step 4.
* If you are going to set up your Agency Budget to budget at a higher level of Program values and transact at a lower level of Program values, you will need to use a translate tree for your Agency Budget. If you are using a Track budget, you will use the CC\_PROG\_TRACK tree. If you are using a Control budget, you will use the CC\_PROG\_CONTROL tree.
* Identify the Program Values for budgeting in column 3, and Program values for transacting in column 4.
* Save and name the tree: Your Three Letter Agency Acronym plus Prog Budget plus the date

 (e.g., DYS Prog Budget 5-1-2022)* **Return the highlighted tree with this template**
 |
| [ ]  Track[ ]  NEW for FY23[ ]  Change from FY22 | **2 |**Choose from Track Rulesets 1-13\_\_\_\_\_\_ | Highlight the level of CC\_DEPT\_TRACK tree for track budgeting in Yellow. (use most current effective-dated version of the tree)Find the lowest level department values and use ***Bold italic*** Font to identify them. These are the values you will use on transactions. | If you selected Rulesets 7 or 11:Highlight the level of CC\_PROG\_TRACK for track budgeting in Yellow. (use most current effective-dated version of the tree)All agencies find the lowest level program values and use ***Bold Italic*** Font to identify them. These are the values you will use on transactions. |
| [ ]  Control[ ]  NEW for FY23[ ]  Change from FY22 | **2** |Choose from Control Rulesets 1-7\_\_\_\_\_\_\_ | Highlight the level of CC\_DEPT\_CONTROL tree for control budgeting in Pink & Underline. (use most current effective-dated version of the tree)Find the lowest level department values and use ***Bold Italic*** Font to identify them. These are the values you will use on transactions. | If you selected Rulesets 4 or 5:Highlight the level of CC\_PROG\_CONTROL for control budgeting in Pink & Underline. (use most current effective-dated version of the tree)All agencies find the lowest level program values and use ***Bold italic*** Font to identify them. These are the values you will use on transactions. |
| [ ]  Control at a High Level and Track at a Lower Level[ ]  NEW for FY23[ ]  Changed from FY22 | \_\_\_\_|Choose from Control Rulesets 1-7\_\_\_\_|Choose from Track Rulesets 1-13 | Highlight the level of CC\_DEPT\_CONTROL tree for control budgeting in Pink & Underline (use most current effective-dated version of the tree4Highlight the level of CC\_DEPT\_TRACK tree for track budgeting in Yellow. (use most current effective-dated version of the tree)Find the lowest level department values and use ***Bold Italic*** Font to identify them. These are the values you will use on transactions. | If you selected Rulesets 4 or 5 for the Control Ruleset:Highlight the level of CC\_PROG\_CONTROL for control budgeting in Pink & Underline. (use most current effective-dated version of the tree)If you selected Rulesets 7 or 11 for the Track Ruleset:Highlight the level of your Program Tree for track budgeting in YellowAll agencies, find the lowest level program values and use Bold Italic Font to identify them. These are the values you will use on transactions. |
| [ ]  TRACK without Budget. [ ]  NEW for FY23[ ]  Changed from FY22 | Establishing budget lines are optional.  | Find the lowest level department values and use ***Bold italic*** Font to identify them. These are the values you will use on transactions.  | Find the lowest level program values and use ***Bold Italic*** Font to identify them. These are the values you will use on transactions. |