



LACDPH | Substance Abuse Prevention Control (SAPC)

Public Health Information Systems (PHIS)

Budget Approval System

Provider User Guide

Version 1.0

06/25/2024

Disclosure Statement

This document represents the Los Angeles County Department of Public Health (LACDPH) implementation instructions for the Budget Approval System. This document specifies the required operation workflow for submitting a budget to SAPC for review and approval. LACDPH reserves the right to modify and change the document at any time. LACDPH will disseminate the information in a timely manner, should there be any change to this document.

Revision and Sign-off Sheet

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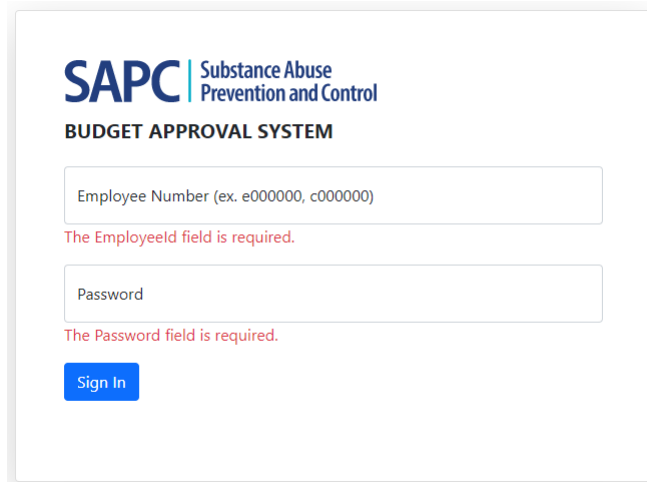
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Budget Approval System

Login Page

Access the Login Page by clicking on this link: <https://sapcapps.ph.lacounty.gov/bas>

Next, login into BAS by entering your Employee Number and Password and then click on the Sign In button. The default Password is “**Test**”.



The screenshot shows the login interface for the SAPC Budget Approval System. At the top left, the logo for SAPC (Substance Abuse Prevention and Control) is displayed. Below the logo, the text "BUDGET APPROVAL SYSTEM" is centered. There are two input fields: the first is labeled "Employee Number (ex. e000000, c000000)" and the second is labeled "Password". Below each input field, a red error message states "The EmployeeId field is required." and "The Password field is required." respectively. At the bottom left, there is a blue "Sign In" button.

When logging into BAS for the first time, the system will prompt you to reset your password from the default password. Follow the password conditions when selecting a new password and enter it in the "New Password" field. Once your password has been reset, re-enter it on the login page along with your Employee ID to login into BAS.

Reset Password

You are seeing this prompt because it is either the first time that you are logging into the Application or you have requested to reset your password.

Password must contain one digit from 1 to 9, one lowercase letter, one uppercase letter, one special character, no space, and it must be 8-16 characters long.

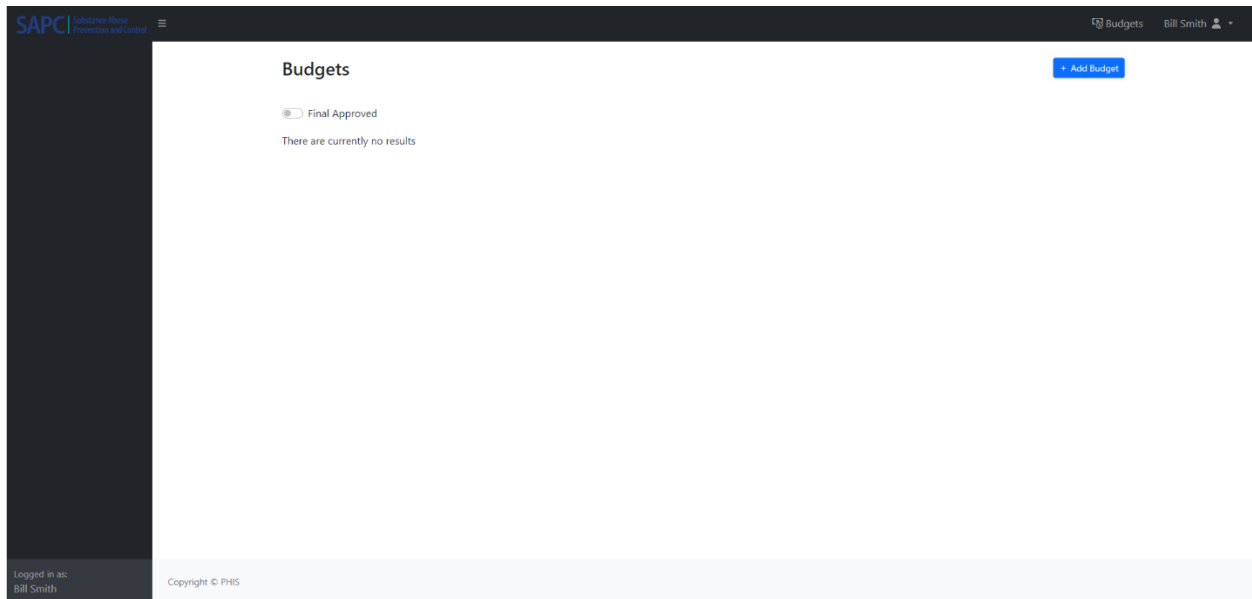
New Password

S
BU

E
C

Password

If the login is successful, the system will display the Budgets page, with list of budgets in progress (if any).



Budgets

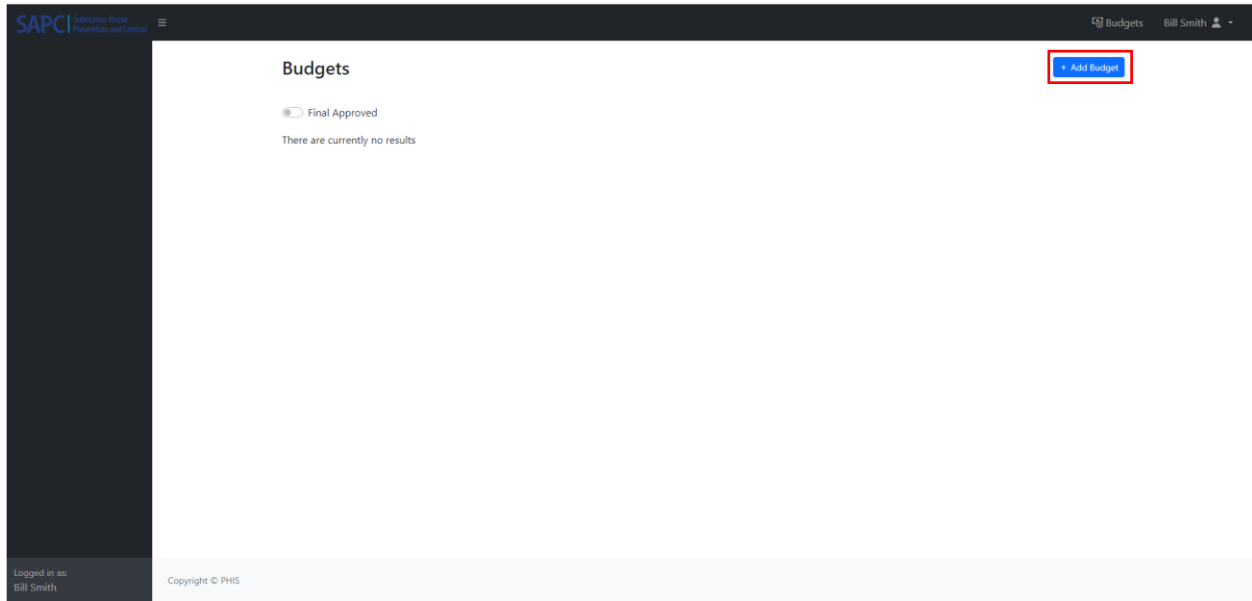
The Budgets page is the starting point for a provider to add a new budget, edit an in-progress budget, delete an in-progress budget, view an approved budget, or review a rejected budget. A complete budget consists of the following seven pages: Information, Salaries, Benefits, Expenses, ICR, Incomes, and Summary.

A budget is in progress when a provider is preparing any one of these pages or has not submitted a complete budget to be reviewed and approved by SAPC. Once the provider has completed all seven pages and submitted the budget it is considered as complete and pending SAPC approval. Once SAPC reviews and approves a budget, the provider will receive an email notification informing them that it has been approved and it is now considered a "Final Approved" budget.

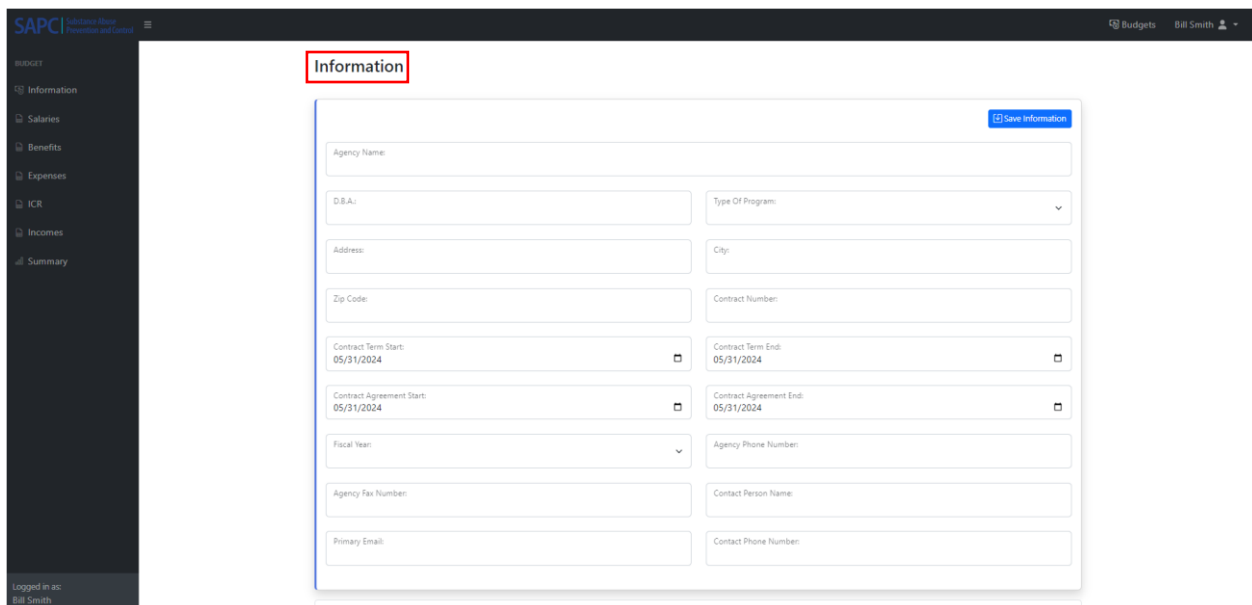
In the case that SAPC rejects a budget, the provider will receive an email notification alerting them that the budget has been rejected. The rejected budget will appear in the Budgets page for the provider to access it so that they can review and make the necessary edits and resubmit the revised budget to SAPC for approval.

Adding a New Budget

To add a new budget, click the “Add Budget” button on the Budgets page.



The “Information” page will appear.



Information

Here you can enter your Agency's information in the relevant fields and use the drop down arrow to make a selection in the "Type of Program" field box. Once the entered information is complete, you simply click on the "Save Information" button.

The screenshot shows the 'Information' form in the SAPCI system. The form contains the following fields:

- Agency Name: ABC Company
- D.E.A.:
- Address: 123 Adams
- Zip Code: 90001
- Contract Term Start: 05/29/2024
- Contract Term End: 05/29/2024
- Contract Agreement Start: 05/29/2024
- Contract Agreement End: 05/29/2024
- Fiscal Year: FY2024-2025
- Agency Phone Number: (123) 456-7890
- Agency Fax Number: (123) 456-7890
- Contact Person Name: Bill Smith
- Primary Email: Bsmith@abc.company.com
- Contact Phone Number: (123) 456-7890

The 'Type Of Program' dropdown menu is open, showing the following options:

- DRUG MEDI-CAL
- PREVENTION SERVICES
- CLIENT ENGAGEMENT/NAVIGATION SERVICES
- RECOVERY BRIDGE HOUSING
- HARM REDUCTION
- OTHER

The 'save information' button is located in the top right corner of the form.

A blue banner will appear confirming the information was saved successfully. In order to complete the budget, you will need to access and complete all of the budget componets on the left side banner and submit it once complete on the Summary page. The next system screen shots along with narratives will guide you step by step to complete and submit your budget.

The screenshot shows the 'Information' form in the SAPCI system. A blue banner at the top indicates 'Budget information was successfully saved'. The form contains the following fields:

- Agency Name: ABC Company
- D.B.A.: (empty)
- Type Of Program: DRUG MEDI-CAL
- Address: 123 Adams
- City: Los Angeles
- Zip Code: 90001
- Contract Number: 111111
- Contract Term Start: 05/29/2024
- Contract Term End: 05/29/2024
- Contract Agreement Start: 05/29/2024
- Contract Agreement End: 05/29/2024
- Fiscal Year: FY2024-2025
- Agency Phone Number: (123) 456-7890
- Agency Fax Number: (123) 456-7890
- Contact Person Name: Bill Smith
- Primary Email: Bsmith@abccompany.com
- Contact Phone Number: (123) 456-7890

A 'save information' button is located in the top right corner of the form.

To view any changes made to any of the fields in this section, simply click on the drop-down arrow for the "History" table and any changes will appear below with the details. The Salaries, Benefits, Expenses, ICR, and Income sections also have a "History" table, and the same instructions apply.

The screenshot shows the 'Information' form with the 'History' table expanded. The form fields are the same as in the previous screenshot, but with updated values:

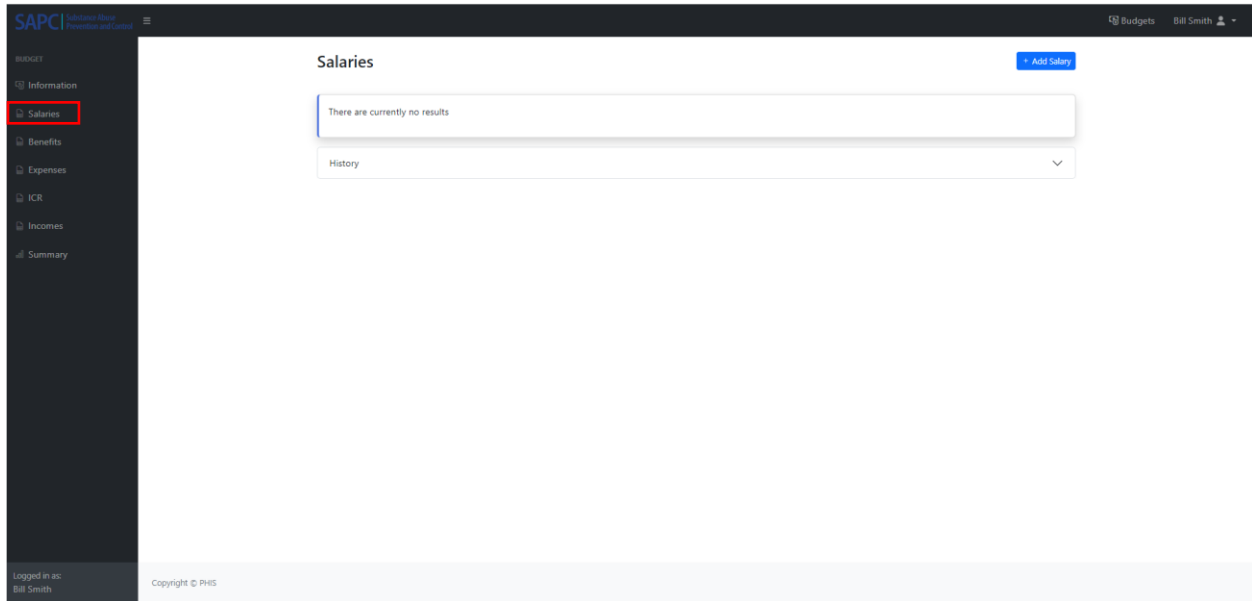
- D.B.A.: (empty)
- Type Of Program: HARM REDUCTION
- Address: 111 Washington
- City: LA
- Zip Code: 90001
- Contract Number: 77777
- Contract Term Start: 05/30/2024
- Contract Term End: 05/30/2024
- Contract Agreement Start: 05/30/2024
- Contract Agreement End: 05/30/2024
- Fiscal Year: FY2024-2025
- Agency Phone Number: (111) 111-1111
- Agency Fax Number: (333) 333-3333
- Contact Person Name: Bill Smith
- Primary Email: jsmith@renew.com
- Contact Phone Number: (222) 222-2222

The 'History' table below the form shows the following data:

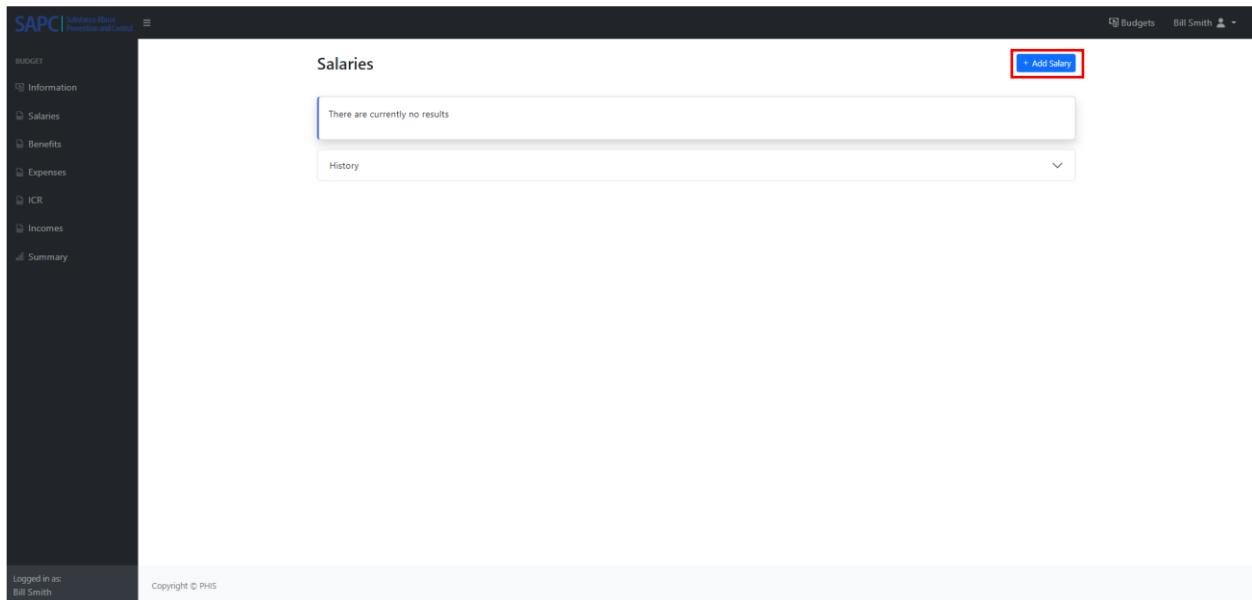
Field Description	Previous Value	Current Value	User	Modified Date
Type of Department	1	Bill Smith	Bill Smith	05/31/2024
Contact Person Name	Joe Smith	Bill Smith	Bill Smith	05/31/2024

Salaries

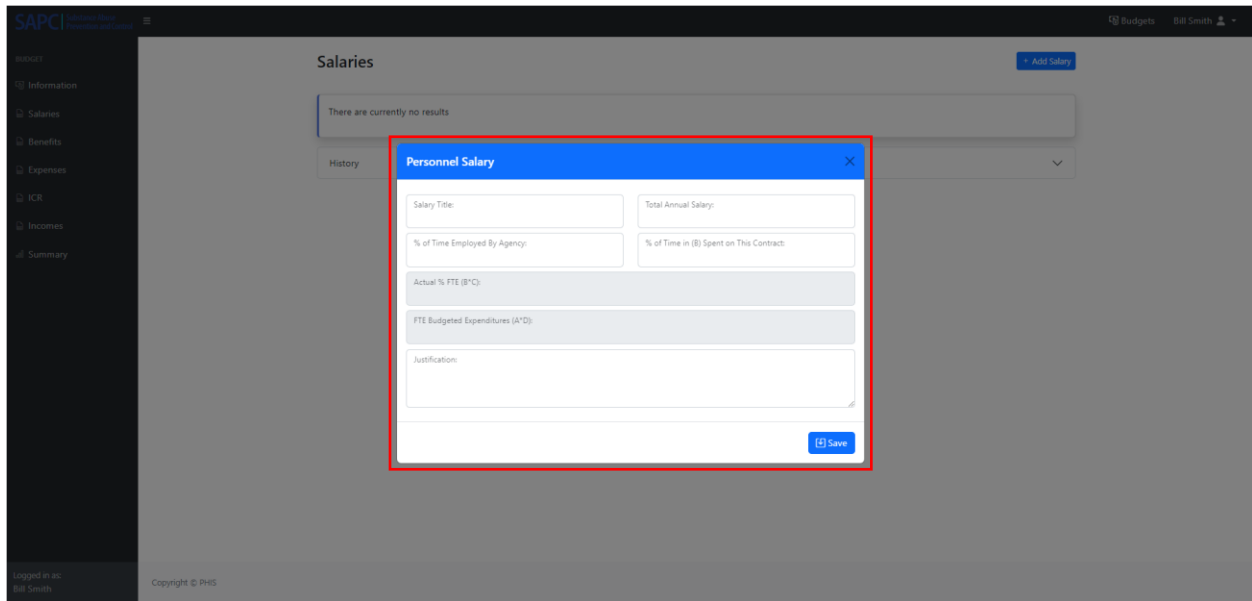
In this section you can add all positions at the Agency with their corresponding salary information. To access this section, click on the “Salaries” page icon on the left-hand side Budget menu bar.



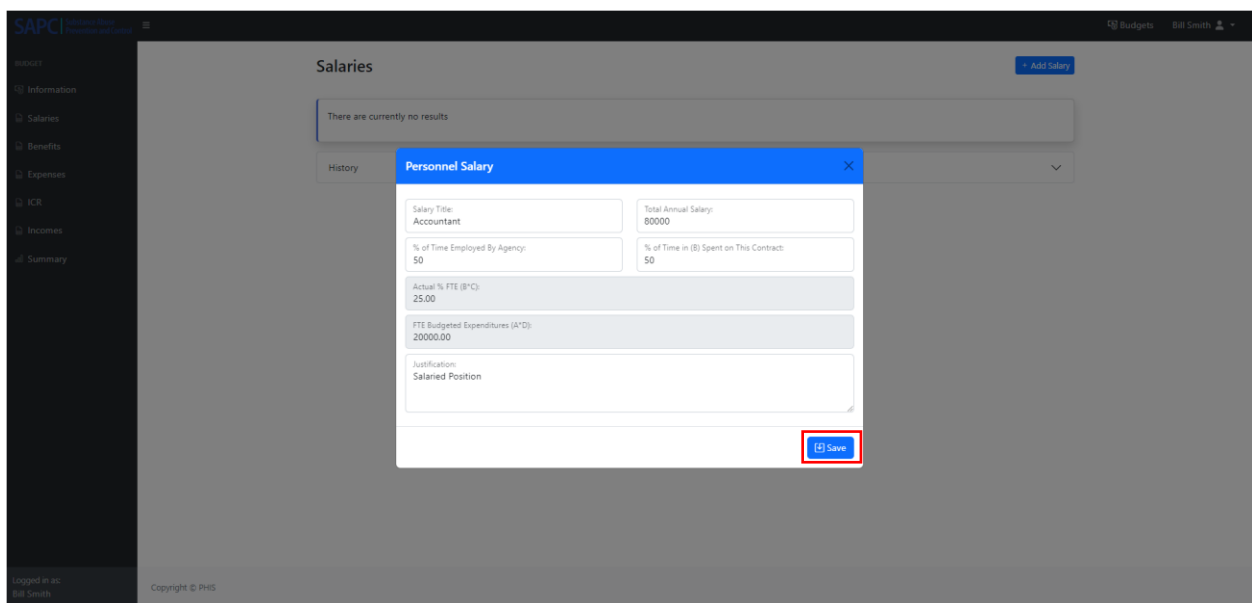
To add salary information, click on the “Add Salary” button.



The Personnel Salary pop-up will appear.



Enter any relevant information in the fields and click on the Save Information button.



A blue banner will appear confirming the information was saved successfully.

BUDGET

- Information
- Salaries
- Benefits
- Expenses
- ICR
- Incomes
- Summary

Salaries

[Add Salary](#)

Salary was successfully added

Show 10 entries Search:

Title	Total Annual Salary	Agency %	Contract %	Actual % FTE	FTE Expenditures
Accountant	\$80,000.00	50.00	50.00	0.25	\$20,000.00
Total					\$20,000.00

Showing 1 to 1 of 1 entries

Previous 1 Next

History

Benefits

In this section you can add Employee Benefits for employees at the Agency. Here you can list all employment related costs, such as Federal taxes, State taxes, Worker’s Compensation, Health insurance, and Retirement benefits, or any other benefits. The Benefits page is dependent on the Salary page and as a result the system will only allow you to save benefits information once the Salary page has been completed.

To access this section, click on the “Benefits” page icon on the left-hand side Budget menu bar.

The screenshot displays the SAPCI interface for the 'Benefits' section. The left sidebar contains a menu with 'Benefits' highlighted. The main content area shows a 'Benefits' form with a 'Total Salaries/Wages' field set to 20000.00. Below this is a table for 'Employee Benefits' with columns for 'Employee Benefits', 'Percentage', and 'Amount'. The table includes rows for Federal Taxes %, State Taxes %, Medical/Dental %, Retirement %, Worker's Compensation %, and Other %, each with input fields for percentage and amount. A 'Total \$' row is at the bottom. A 'Save Benefits' button is located in the top right of the table area. The footer shows 'Logged in as: Bill Smith' and 'Copyright © PHS'.

Employee Benefits	Percentage	Amount
Federal Taxes %	0	0.00
State Taxes %	0	0.00
Medical/Dental %	0	0.00
Retirement %	0	0.00
Worker's Compensation %	0	0.00
Other %	0	0.00
Total \$		0.00

If the “Save Benefits” icon appears at the top left of the section this means that system has validated that the Salary page has been completed. In this case you can begin to enter any relevant information in the fields. If the icon is not present then, you will need to click on the Salaries page and add at least one entry before being able to complete the Benefits page.

The screenshot shows the SAPCI Benefits page. At the top, it displays 'Total Salaries/Wages: 20000.00'. Below this is a table for 'Employee Benefits' with columns for 'Percentage' and 'Amount'. The table includes rows for Federal Taxes %, State Taxes %, Medical/Dental %, Retirement %, Worker's Compensation %, and Other %. A blue 'Save Benefits' button is highlighted with a red box in the top right corner of the table area.

Employee Benefits	Percentage	Amount
Federal Taxes %	10	2000.00
State Taxes %	10	2000.00
Medical/Dental %	10	2000.00
Retirement %	10	2000.00
Worker's Compensation %	10	2000.00
Other %	0.00	0.00
Total \$		10000.00

Additional benefits can be added using the “Other” category rows.

The screenshot shows the SAPCI Benefits page with an additional 'Other' row added to the table. The 'Other %' row now has a value of 0.00 and an amount of 0.00. A new 'Other' row has been added below it, also with 0.00 for both percentage and amount. A red box highlights the 'Add' button (a red square with a plus sign) next to the new 'Other' row. The total amount is now 8200.00.

Employee Benefits	Percentage	Amount
Federal Taxes %	10	2000.00
State Taxes %	10	200.00
Medical/Dental %	10	2000.00
Retirement %	10	2000.00
Worker's Compensation %	10	2000.00
Other %	0.00	0.00
Other	0	0
Total \$		8200.00

To add Other Employee Benefits click on the “+” icon on the “Other %” row and type in the name of your choice, e.g. Bonus.

The screenshot shows the SAPCI Benefits page. At the top, it displays 'Total Salaries/Wages: 20000.00'. Below this is a table with columns for 'Employee Benefits', 'Percentage', and 'Amount'. The table lists several benefit categories, each with a percentage of 10.00 and an amount of 2000.00. The 'Other %' row is highlighted with a red box around the '+' icon, and a text input field below it contains the word 'Bonus'. A 'Save Benefits' button is visible in the top right corner of the table area.

Employee Benefits	Percentage	Amount
Federal Taxes %	10.00	2000.00
State Taxes %	10.00	2000.00
Medical/Dental %	10.00	2000.00
Retirement %	10.00	2000.00
Worker's Compensation %	10.00	2000.00
Other %	10.00	2000.00
Bonus	10	2000.00
Total \$		12000.00

Once all of the desired information has been entered click on the Save Benefits icon to save the entries.

The screenshot shows the SAPCI Benefits page after the 'Bonus' entry has been added. The 'Other %' row now shows a percentage of 0.00 and an amount of 0.00. The 'Save Benefits' button in the top right corner of the table area is highlighted with a red box. The 'Total \$' at the bottom of the table is now 10000.00.

Employee Benefits	Percentage	Amount
Federal Taxes %	10.00	2000.00
State Taxes %	10.00	2000.00
Medical/Dental %	10.00	2000.00
Retirement %	10.00	2000.00
Worker's Compensation %	10.00	2000.00
Other %	0.00	0.00
Other	0.00	0.00
Total \$		10000.00

A blue banner will then appear confirming the information was saved successfully.

The screenshot shows the SAPCI web interface. At the top left, the logo 'SAPCI' is visible with the tagline 'Advancing Your Research and Control'. The top right corner shows 'Budgets' and the user name 'Bill Smith'. A dark sidebar on the left contains navigation links: 'Home', 'Information', 'Salaries', 'Benefits', 'Expenses', 'ICR', 'Incomes', and 'Summary'. The main content area is titled 'Benefits'. A blue banner at the top of this area reads 'Employee Benefits were saved.' Below the banner, a grey box shows 'Total Salaries/Wages: 20000.00'. A 'Save Benefits' button is located in the top right of the table area. The table below has three columns: 'Employee Benefits', 'Percentage', and 'Amount'. It lists various benefit categories with their respective percentages and amounts. A 'History' dropdown is at the bottom of the table.

Employee Benefits	Percentage	Amount
Federal Taxes %	10.00	2000.00
State Taxes %	10.00	2000.00
Medical/Dental %	10.00	2000.00
Retirement %	10.00	2000.00
Worker's Compensation %	10.00	2000.00
Other %	10.00	2000.00
Bonus	10	2000.00
Total \$		12000.00

Next, click on the Expenses icon.

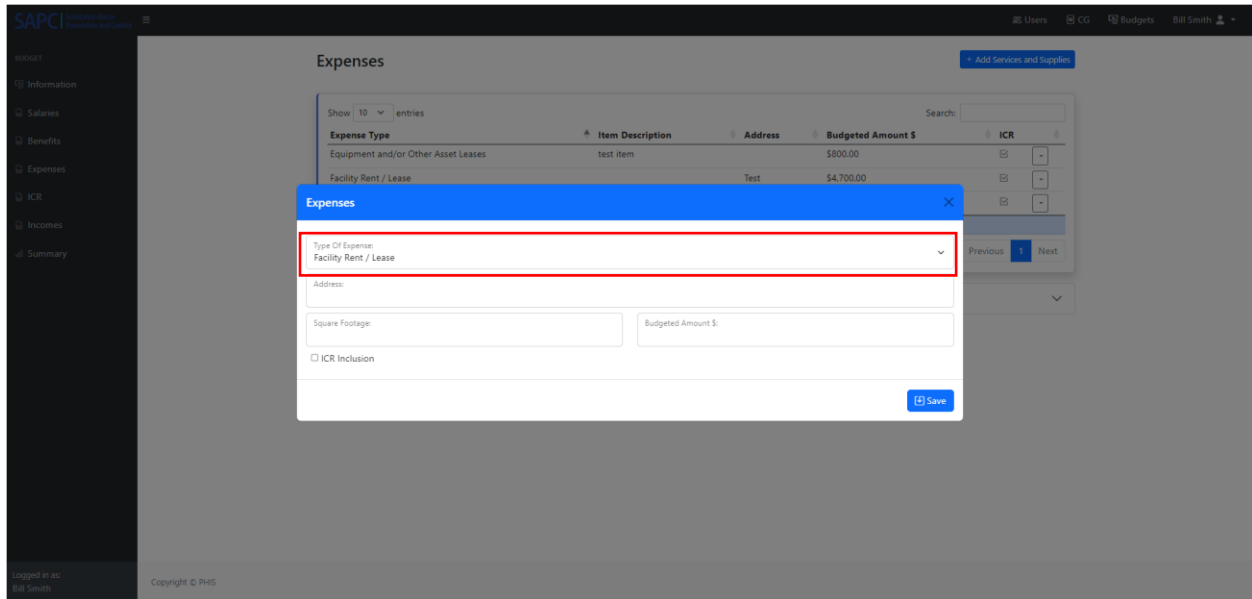
Expenses

In this section you can add expenses incurred by the Agency such as facility rent, equipment leases, other leases, other services and supplies, expenses allowed in ICR Base, and expenses not allowed in ICR Base.

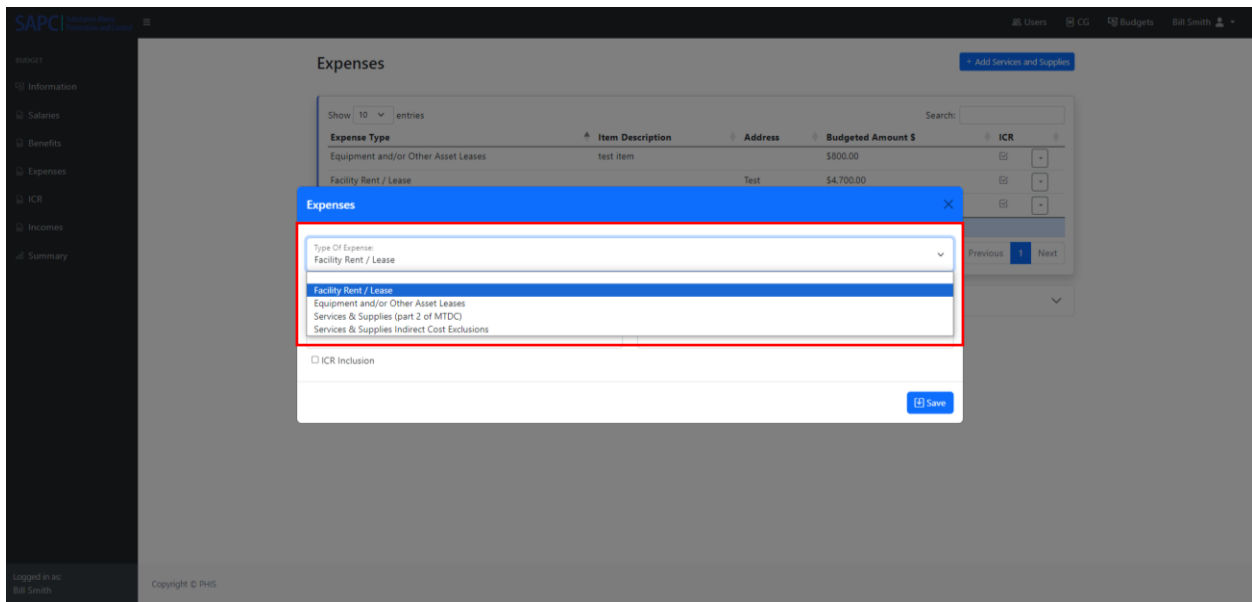
To access this section, click on the “Expenses” page icon on the left-hand side Budget menu bar.

The screenshot shows the SAPCI Budget Management System interface. On the left is a dark sidebar menu with the following items: Information, Salaries, Benefits, Expenses (highlighted with a red box), ICR, Incomes, and Summary. The main content area is titled "Expenses" and features a blue button labeled "Add Services and Supplies". Below the title is a search bar containing the text "There are currently no results". Underneath the search bar is a "History" dropdown menu with a downward arrow. The top right corner of the page shows "Budgets" and "Bill Smith" with a user profile icon. The bottom left corner indicates "Logged in as: Bill Smith" and the bottom center shows "Copyright © PHS".

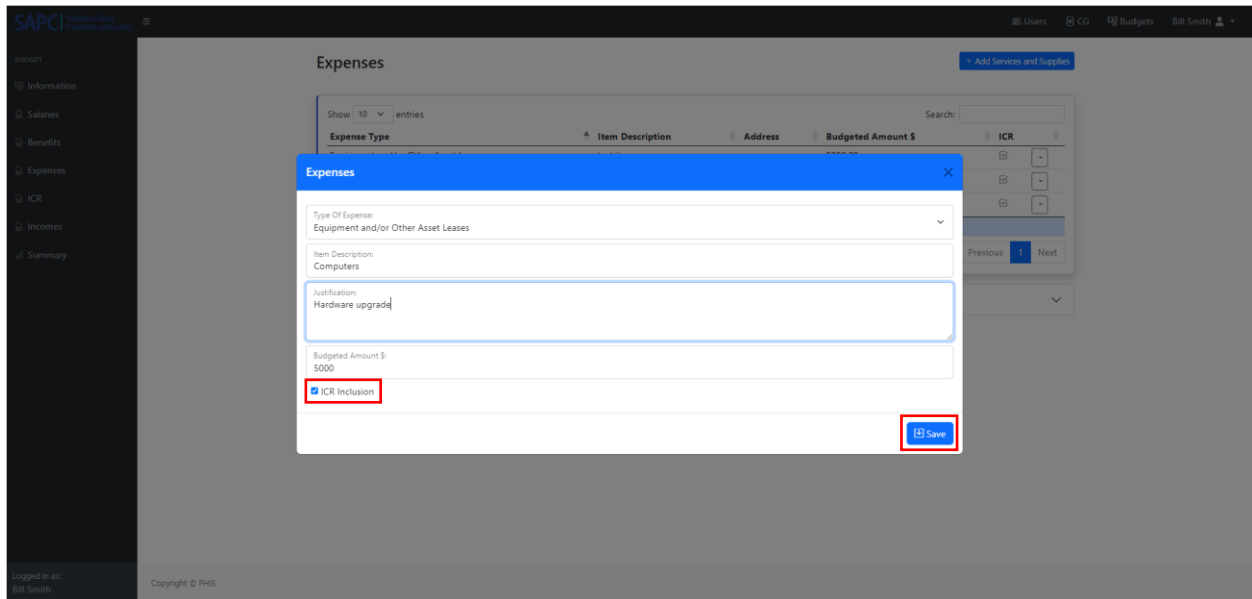
To add an expense, click on the “Add Service and Supplies” button. A pop-up box titled Services and Supplies will appear with a drop-down field in which you can select the type of expense.



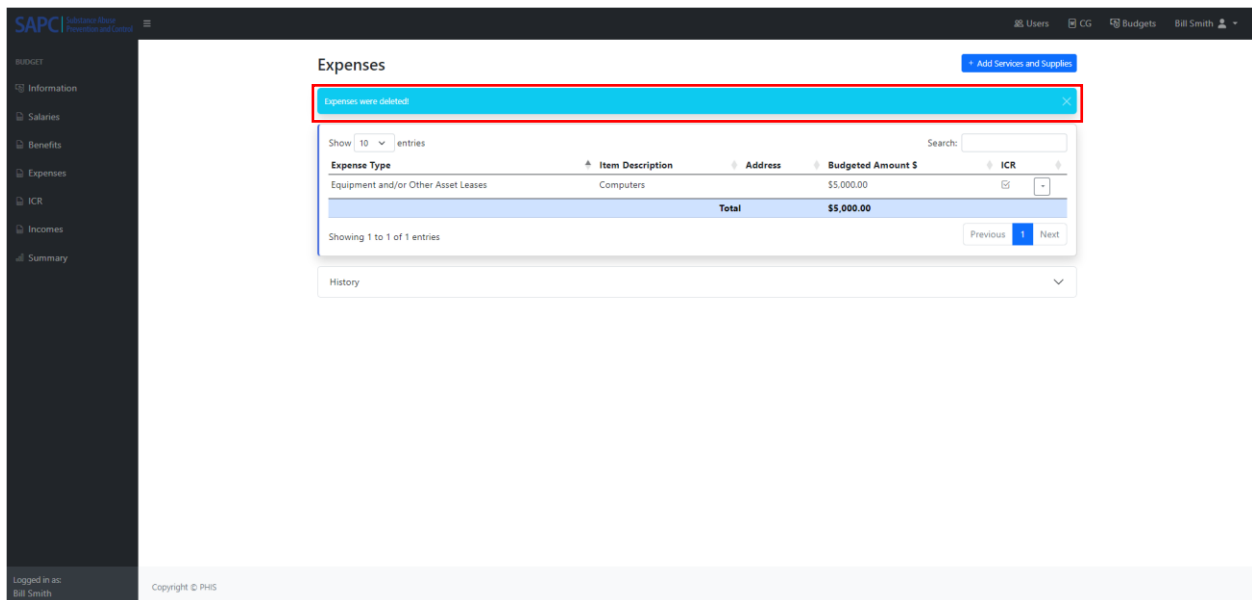
Select a Type of Expense.



Once an expense category has been selected, then enter any relevant information in the remaining fields and click on the save button. If the expense is to be included in the ICR, click on the ICR Inclusion check box, and then click on the save button.



A blue banner will appear confirming the information was saved successfully and the expense will appear as a saved entry.



An expense can be edited or deleted by clicking on the drop-down arrow at the right of the ICR column.

The screenshot shows the SAPCI Expenses page. A notification at the top says "Expenses were saved!". Below it is a table with the following data:

Expense Type	Item Description	Address	Budgeted Amount \$	ICR
Equipment and/or Other Asset Leases	Computers		\$5,000.00	<input type="checkbox"/>
Total			\$5,000.00	

Below the table, there are "Previous" and "Next" buttons. A red box highlights the "Edit" and "Delete" buttons in the top right corner of the table area.

Once the expense has been edited, click on the save button.

The screenshot shows the SAPCI Expenses page with an edit modal open. The modal contains the following fields:

- Type Of Expense: Equipment and/or Other Asset Leases
- Item Description: Computers
- Justification: Hardware upgrade
- Budgeted Amount \$: 7000
- ICR Inclusion

A red box highlights the "Save" button at the bottom right of the modal.

A blue banner will appear confirming the information was saved successfully and the revised expense will appear as a saved entry.

The screenshot displays the SAPCI Budget Administration and Control interface. A blue banner at the top of the main content area reads "Expenses were saved." Below this banner is a table titled "Expenses" with the following data:

Expense Type	Item Description	Address	Budgeted Amount \$	ICR
Equipment and/or Other Asset Leases	Computers		\$7,000.00	
Total			\$7,000.00	

The table also includes a search bar, a "Show 10 entries" dropdown, and pagination controls (Previous, 1, Next). A "History" section is visible below the table. The interface includes a sidebar with navigation options (Information, Salaries, Benefits, Expenses, ICR, Incomes, Summary) and a footer with the text "Logged in as: Bill Smith" and "Copyright © PHS".

ICR

As part of the budget final review, SAPC will review the federally approved rate letter (if applicable) to determine what costs/expenditures are allowable as part of the Indirect Cost Rate (ICR).

There are two possible options to determine the appropriate ICR:

1. A Federally Approved Rate: This is an ICR that a provider has applied and has been approved by the federal government. A provider with a federally approved rate must present their approval letter and must adhere to the restrictions identified in the letter.
2. De Minimis Indirect Cost Rate of 15%: A provider without a federally approved ICR will default to a standard 15% de minimis indirect cost rate. This 15% rate can only be applied to the modified total direct cost (MTDC) per Code of Federal Regulations Title 2 Part 200 (2 CFR 200).

The ICR Page is dependent on information entered on the Salaries, Benefits, and the Expenses page. The system will validate that these three pages have been completed before allowing data to be saved on the ICR page.

To access this section, click on the “ICR” page icon on the left-hand side Budget menu bar.

The system will prefill Option A. To select Option B simply click on the radio button next to the desired option.

The screenshot displays the SAPC ICR page. The left-hand side features a navigation menu with the following items: Information, Salaries, Benefits, Expenses, ICR (highlighted with a red box), Incomes, and Summary. The main content area is titled "ICR" and shows the following data:

Total Budgeted Expenses: 3000.00

PART I: Budgeted Direct Costs

	Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$	22916.25
Facility Rent / Lease \$	0.00
Equipment and/or Other Asset Leases \$	0.00
Other services & Supplies (part 2 of MTDC) \$	3000.00
Charges for patient care, tuition remission \$	0.00
Total Direct Expenses: \$	25916.25

PART II: Budgeted Indirect Costs [Estimate ICR]

Option A: Use Federally Approved Const Rate(ICR) x Approved Base
 Option B: Use De Minimis ICR of 15% x MTDC

	Proposed Budget
Federally Approved ICR %	0
ICR Base from Approved Letter \$	3000.00
Indirect Cost \$	0.00

A red arrow points to the radio button for Option A.

If option A is selected, you will need fill in a value for the Federally Approved ICR %. The system will automatically fill in the remaining required values for the Indirect Cost calculation.

The screenshot shows the SAPCI ICR form. At the top, it displays 'Total Budgeted Expenses: 3000.00'. Below this, there are two main sections: 'PART I: Budgeted Direct Costs' and 'PART II: Budgeted Indirect Costs'. In the 'PART II' section, 'Option A: Use Federally Approved Const Rate(ICR) x Approved Base' is selected. The 'Federally Approved ICR %' field is highlighted with a red box and contains the value '20'. The 'ICR Base from Approved Letter \$' field contains '3000.00'. The 'Indirect Cost \$' field is currently '0.00'. A blue 'Save ICR' button is visible in the top right of the 'PART II' section.

PART I: Budgeted Direct Costs		Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$		22916.25
Facility Rent / Lease \$		0.00
Equipment and/or Other Asset Leases \$		0.00
Other services & Supplies (part 2 of MTDC) \$		3000.00
Charges for patient care, tuition remission \$		0.00
Total Direct Expenses: \$		25916.25

PART II: Budgeted Indirect Costs		Proposed Budget
Federally Approved ICR %		20
ICR Base from Approved Letter \$		3000.00
Indirect Cost \$		0.00

To attach the letter for your federally approved rate, click on the “Choose File” icon, attach the file and click the Submit button.

Once the fields have been populated and the file attached, click on the “Save ICR” icon.

This screenshot shows the 'ICR Document Upload' section of the form. It features a 'Choose File' button (highlighted with a red box) and a 'Submit' button (also highlighted with a red box). The 'PART II: Budgeted Indirect Costs' table from the previous screenshot is visible above, now showing an 'Indirect Cost \$' of '600.00'. A blue 'Save ICR' button is also present in the top right of the 'PART II' section.

PART II: Budgeted Indirect Costs		Proposed Budget
Federally Approved ICR %		20.00
ICR Base from Approved Letter \$		3000.00
Indirect Cost \$		600.00

A blue banner will appear confirming the information was saved successfully and green check marks will appear in the ICR calculation table.

SAPCI Advancing Access
Improving Patient Outcomes

CG Budgets Bill Smith

ICR

ICR was saved

Total Budgeted Expenses: 26516.25

PART I: Budgeted Direct Costs

	Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$	22916.25
Facility Rent / Lease \$	0.00
Equipment and/or Other Asset Leases \$	0.00
Other services & Supplies (part 2 of MTDC) \$	3000.00
Charges for patient care, tuition remission \$	0.00
Total Direct Expenses: \$	25916.25

PART II: Budgeted Indirect Costs Save ICR

Option A: Use Federally Approved Const Rate(ICR) x Approved Base
 Option B: Use De Minimis ICR of 15% x MTDC

	Proposed Budget
Federally Approved ICR %	20 ✓
ICR Base from Approved Letter \$	3000.00 ✓
Indirect Cost \$	600.00

Logged in as: Bill Smith

If any fields are missing when a save attempt is made the system will validate the entry and prompt you of the missing values.

SAPCI Advancing Access
Improving Patient Outcomes

CG Budgets Bill Smith

ICR

Total Budgeted Expenses: 26516.25

PART I: Budgeted Direct Costs

	Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$	22916.25
Facility Rent / Lease \$	0.00
Equipment and/or Other Asset Leases \$	0.00
Other services & Supplies (part 2 of MTDC) \$	3000.00
Charges for patient care, tuition remission \$	0.00
Total Direct Expenses: \$	25916.25

PART II: Budgeted Indirect Costs Save ICR

Option A: Use Federally Approved Const Rate(ICR) x Approved Base
 Option B: Use De Minimis ICR of 15% x MTDC

	Proposed Budget
Federally Approved ICR %	0 0 <small>Federally Approved ICR % is required</small>
ICR Base from Approved Letter \$	3000.00 ✓
Indirect Cost \$	600.00

Logged in as: Bill Smith

If option B is selected, the system will automatically fill in the all values for the Indirect Cost calculation. To continue with completing the budget click on the “Save ICR” button.

The screenshot displays the SAPCI ICR (Indirect Cost Rate) budgeting interface. The page title is "ICR". At the top left, the SAPCI logo is visible. The top right shows the user "Bill Smith" and the "Budgets" section. A sidebar on the left contains navigation links: Information, Salaries, Benefits, Expenses, ICR, Incomes, and Summary. The main content area is divided into two sections: "PART I: Budgeted Direct Costs" and "PART II: Budgeted Indirect Costs".

Total Budgeted Expenses: 29803.69

PART I: Budgeted Direct Costs

	Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$	22916.25
Facility Rent / Lease \$	0.00
Equipment and/or Other Asset Leases \$	0.00
Other services & Supplies (part 2 of MTDC) \$	3000.00
Charges for patient care, tuition remission \$	0.00
Total Direct Expenses: \$	25916.25

PART II: Budgeted Indirect Costs

Option A: Use Federally Approved Const Rate(ICR) x Approved Base

Option B: Use De Minimis ICR of 15% x MTDC

Proposed Budget

De Minimis ICR %	15.00
MTDC (MTDC Part 1 + MTDC Part 2) \$	25916.25
Indirect Cost \$	3887.44

A "Save ICR" button is located in the top right corner of the PART II section. The values for the indirect cost calculation (15.00, 25916.25, and 3887.44) are highlighted with a red box.

Logged in as: Bill Smith

Incomes

In this section you can add income or revenue earned by the Agency through a SAPC Contract, Participant/Client Fees, Program Investment Fund, and the 60 Day Operating Reserve.

The Incomes page is dependent on information entered on the ICR page which means the system will validate that the ICR page has been completed before allowing data to be saved on the Incomes page.

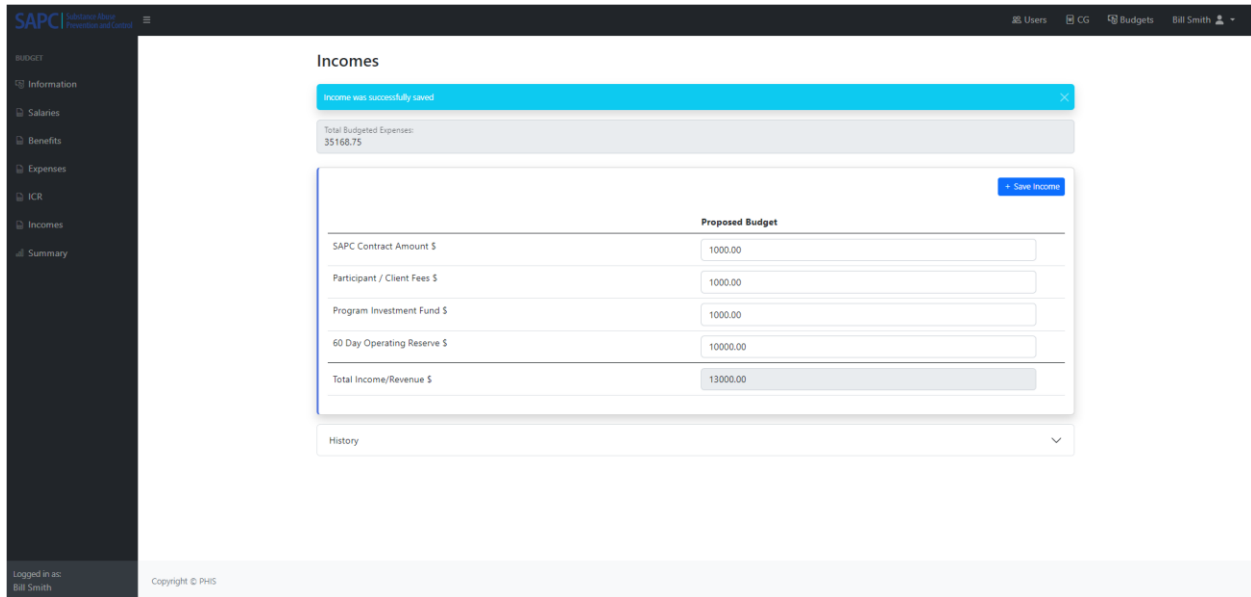
To access this section, click on the “Incomes” page icon on the left-hand side Budget menu bar.

The screenshot displays the SAPC Incomes page. The left-hand side features a dark navigation menu with the following items: Information, Salaries, Benefits, Expenses, ICR, Incomes (highlighted with a red box), and Summary. The main content area is titled 'Incomes' and shows a 'Total Budgeted Expenses' of 49231.31. Below this is a 'Proposed Budget' table with the following rows and values:

	Proposed Budget
SAPC Contract Amount \$	0
Participant / Client Fees \$	0
Program Investment Fund \$	0
60 Day Operating Reserve \$	0
Total Income/Revenue \$	0

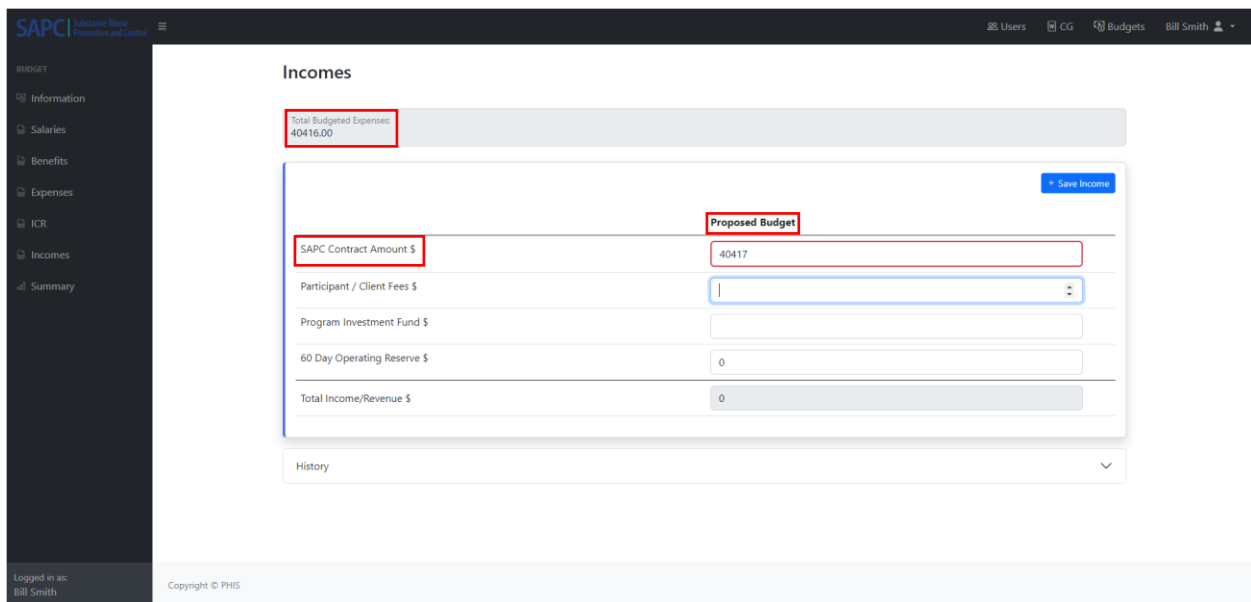
A 'Save Income' button is located in the top right corner of the table area. Below the table is a 'History' section with a dropdown arrow. The footer of the page indicates 'Logged in as: Bill Smith' and 'Copyright © PHIS'.

If the “Save” Income icon appears at the top left of the page this means the system has validated that the ICR page has been completed.



When the running calculation for “Total Income/Revenue” exceeds the “Total Budgeted Expenses” from the Expenses page, the system will alert you with red highlighting of the field(s) which exceed the total. This rule only applies to the first three fields on this page.

Example in which the value entered in the first field results in the “Proposed Budget” total to exceed the “Total Budgeted Expenses”:



Example in which the values entered in the second and third fields result in the “Proposed Budget” total to exceed the “Total Budgeted Expenses”:

The screenshot shows the SAPCI Incomes form. The 'Total Budgeted Expenses' is 40416.00. The 'Proposed Budget' section includes the following entries:

Category	Value
SAPC Contract Amount \$	40416
Participant / Client Fees \$	1
Program Investment Fund \$	-1
60 Day Operating Reserve \$	0
Total Income/Revenue \$	0

Once all of the desired information has been entered click on the “+ Save Income” icon to save the entries.

The screenshot shows the SAPCI Incomes form with updated values. The 'Total Budgeted Expenses' is 40400.00. The 'Proposed Budget' section includes the following entries:

Category	Value
SAPC Contract Amount \$	1000
Participant / Client Fees \$	1000
Private Funding / Donation \$	1000
Public Assistance \$	1000
Program Investment Fund \$	1000
60 Day Operating Reserve \$	1000
Total Income/Revenue \$	0

A blue banner will appear confirming the information was saved successfully.

The screenshot displays the SAPCI Incomes management interface. A blue banner at the top of the main content area reads "Income was successfully saved". Below this banner, the "Total Budgeted Expenses" are listed as 40400.00. The main section is titled "Proposed Budget" and contains a table with the following data:

	Proposed Budget
SAPC Contract Amount \$	1000.00
Participant / Client Fees \$	1000.00
Private Funding / Donation \$	1000.00
Public Assistance \$	1000.00
Program Investment Fund \$	1000.00
60 Day Operating Reserve \$	10000.00
Total Income/Revenue \$	15000.00

At the bottom of the interface, it shows "Logged in as: Bill Smith" and "Copyright © PHS".

Summary

The Summary page displays a breadcrumb navigation bar which provides a status of the budget approval review process. The bar highlights which group is currently reviewing the budget. This section serves as a snapshot of the information entered on the previous pages of the budget. Here you can review the Agency's information, and by scrolling down the page, view Part I Budgeted Direct Costs, Part II Budgeted Indirect Costs, Part III Total Income/Review tables, and the Budget Approval History table. To access this section, click on the "Summary" page icon on the left-hand side Budget menu bar.

The screenshot shows the SAPCI Summary page. At the top, a breadcrumb navigation bar includes links for Provider Review, Contract Review, Program Review, Finance Review, and Contract Final Review. Below this is the Information section, which contains the following details:

Type of Program: DRUG MEDI-CAL	Address: 123 Adams
Contracted Agency Name: ABC Company	City: Los Angeles
D.B.A.:	Zip Code: 90001
Contract Number: 111111	Agency Tel. Number: (123) 456-7890
Contract Term Start Date: 05/29/2024	Fax Number: (123) 456-7890
Contract Term End Date: 05/29/2024	Contact Person: Bill Smith
Contract Agreement From: 05/29/2024	Primary Email Address: bsmith@abc.company.com
Contract Agreement To: 05/29/2024	Contact Phone Number: (123) 456-7890
Fiscal Year: FY2024-2025	

The screenshot shows the budget tables for Part I, Part II, and Part III. Each table has a 'Proposed Budget' column.

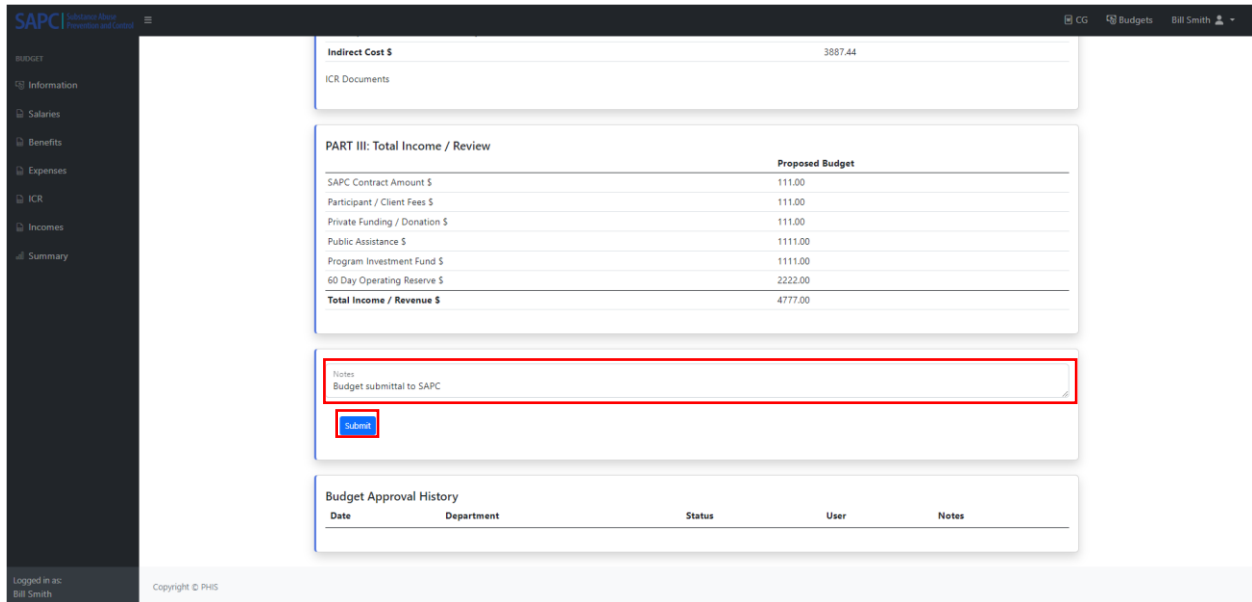
	Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$	32000.00
Facility Rent / Lease \$	0.00
Equipment and/or Other Asset Leases \$	7000.00
Other services & Supplies (part 2 of MTDC) \$	0.00
Charges for patient care, tuition remission \$	0.00
Total Direct Expenses \$	39000.00

	Proposed Budget
Federally Approved ICR %	20.00
ICR Base from Approved Letter \$	7000.00
Indirect Cost \$	1400.00
ICR Documents	

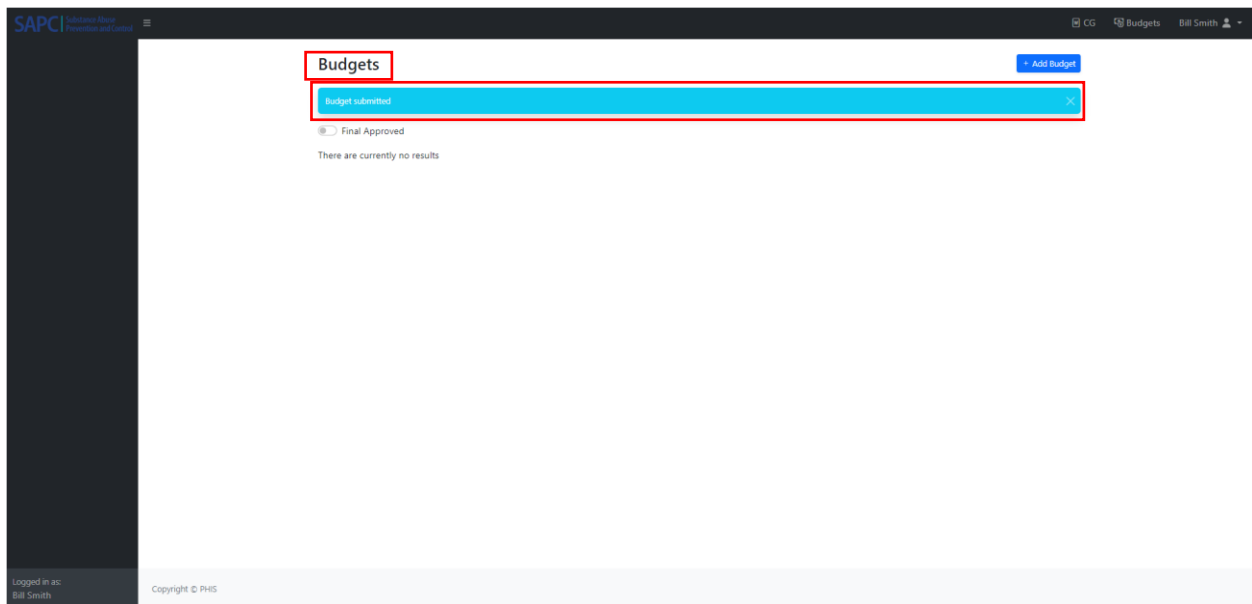
	Proposed Budget
SAPC Contract Amount \$	1000.00
Participant / Client Fees \$	1000.00
Private Funding / Donation \$	1000.00
Public Assistance \$	1000.00
Program Investment Fund \$	1000.00
60 Day Operating Reserve \$	10000.00
Total Income / Revenue \$	15000.00

In addition to the budget details, the Summary page includes a "Submit" button with a "Notes" field box. Once you have you have verified the accuracy of the information on the Summary page, then you can

add any desired notes and click on the “Submit” button to save and forward the budget to SAPC for approval. The system will display the Budgets page once the “Submit” button is clicked.



A blue banner will appear on the Budgets page confirming the information was saved successfully.



If there is any required missing information, then the system will display the top of the Summary page when the information is not complete such as when data is missing on the income page.

- REPORT
- Information
- Salaries
- Benefits
- Expenses
- ICR
- Incomes
- Summary

Summary

Provider Review > Contract Review > Program Review > Finance Review > Contract Final Review

Information

Type of Program: DRUG MED-CAL	Address: 123 Adams
Contracted Agency Name: ABC Company	City: Los Angeles
D.B.A.:	Zip Code: 90001
Contract Number: 111111	Agency Tel. Number: (123) 456-7890
Contract Term Start Date: 05/29/2024	Fax Number: (123) 456-7890
Contract Term End Date: 05/29/2024	Contact Person: Bill Smith
Contract Agreement From: 05/29/2024	Primary Email Address: bsmith@abc.company.com
Contract Agreement To: 05/29/2024	Contact Phone Number: (123) 456-7890
Fiscal Year: FY2024-2025	

PART I: Budgeted Direct Costs

	Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$	32000.00
Facility Rent / Lease \$	0.00
Equipment and/or Other Asset Leases \$	7000.00
Other services & Supplies (part 2 of MTDC) \$	0.00
Charges for patient care, tuition remission \$	0.00
Total Direct Expenses: \$	39000.00

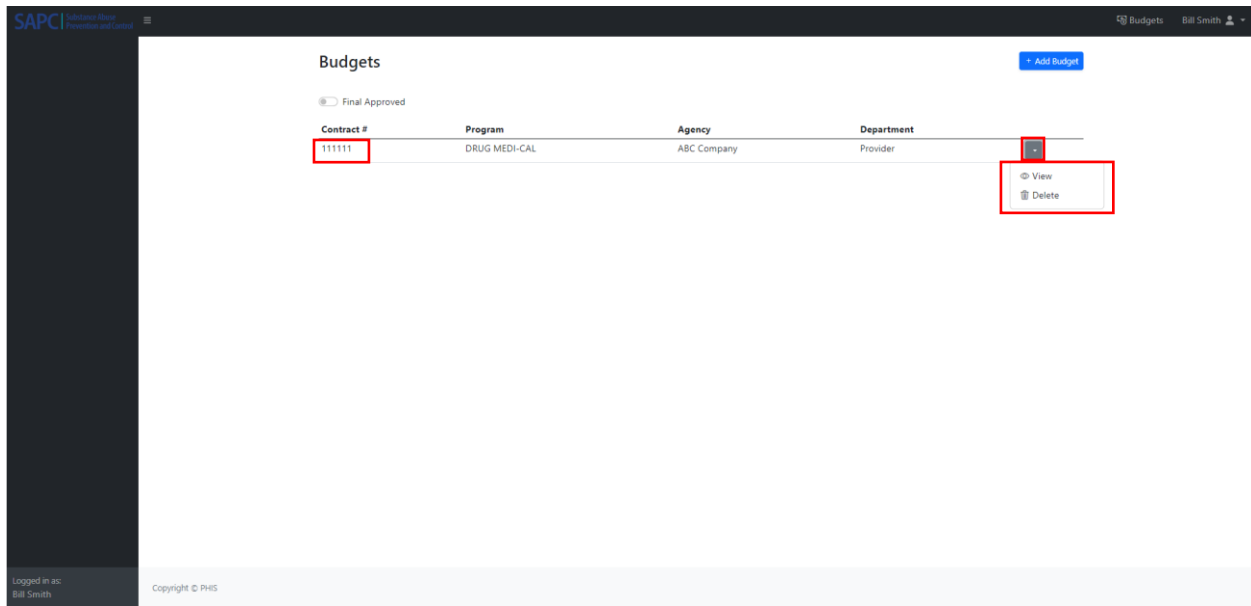
PART II: Budgeted Indirect Costs

	Proposed Budget
Federally Approved ICR %	20.00

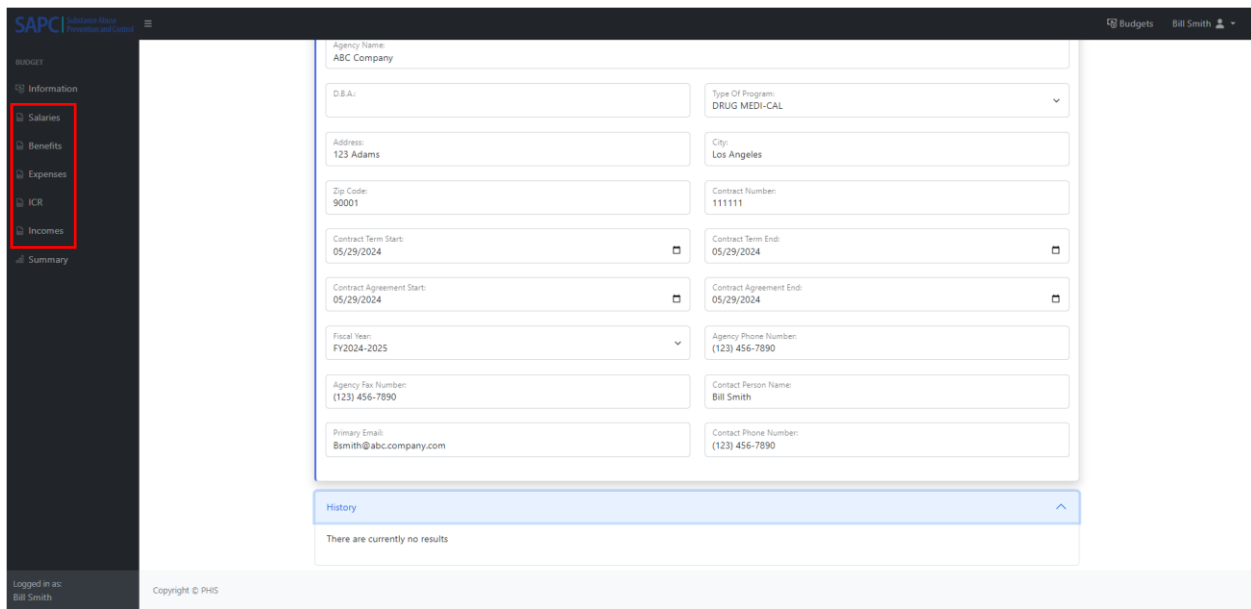
Existing Budgets

Editing Existing Budgets

To view or edit an existing budget click on the down arrow icon to the right of the status for the desired Contract #. Here you can select the view icon to view the budget or the delete icon to delete budget.



After clicking the view icon, the Budget's Information page will appear. You can make any necessary edits on this page or click on any of the five 5 budget component pages to make edits and save the edits using the "Save" icon on each corresponding page.



If the budget is ready and complete, navigate to the Summary page to add any notes and click on the “Submit” button.

The screenshot displays the SAPCI Budgets Summary page. The sidebar on the left contains navigation options: Information, Salaries, Benefits, Expenses, ICR, Incomes, and Summary (highlighted with a red box). The main content area includes the following sections:

- Indirect Cost \$**: 1400.00
- ICR Documents**: (empty field)
- PART III: Total Income / Review**
- Proposed Budget** table:

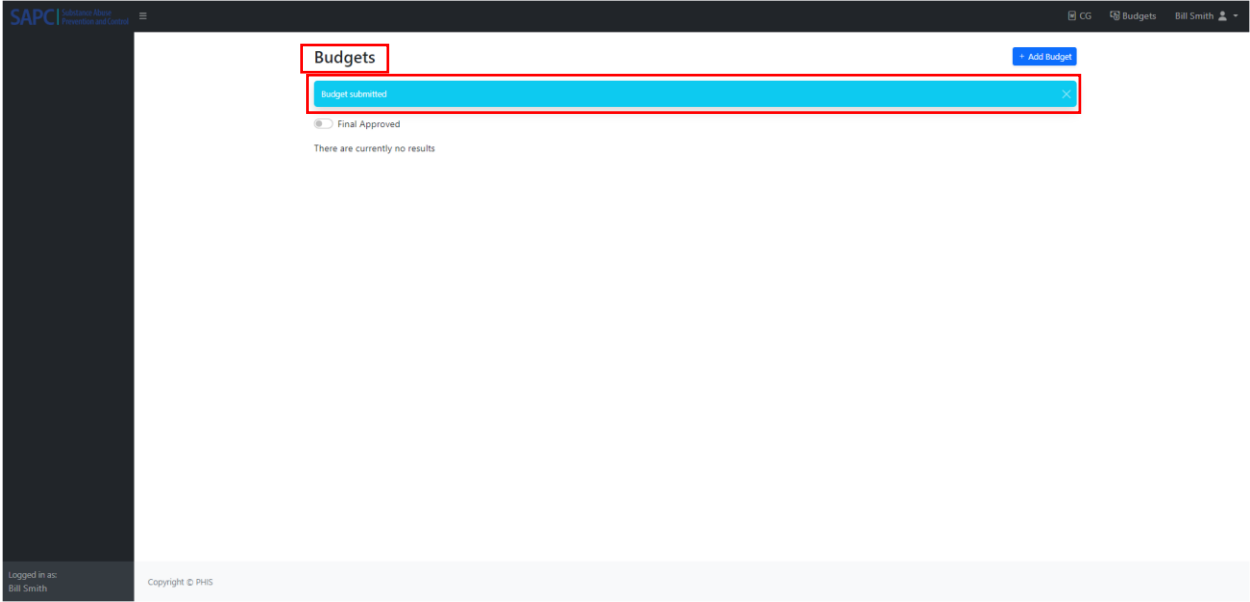
	Proposed Budget
SAPC Contract Amount \$	1000.00
Participant / Client Fees \$	1000.00
Private Funding / Donation \$	1000.00
Public Assistance \$	1000.00
Program Investment Fund \$	1000.00
60 Day Operating Reserve \$	10000.00
Total Income / Revenue \$	15000.00

- Notes**: ABC Budget (highlighted with a red box)
- Submit** button (highlighted with a red box)
- Budget Approval History** table:

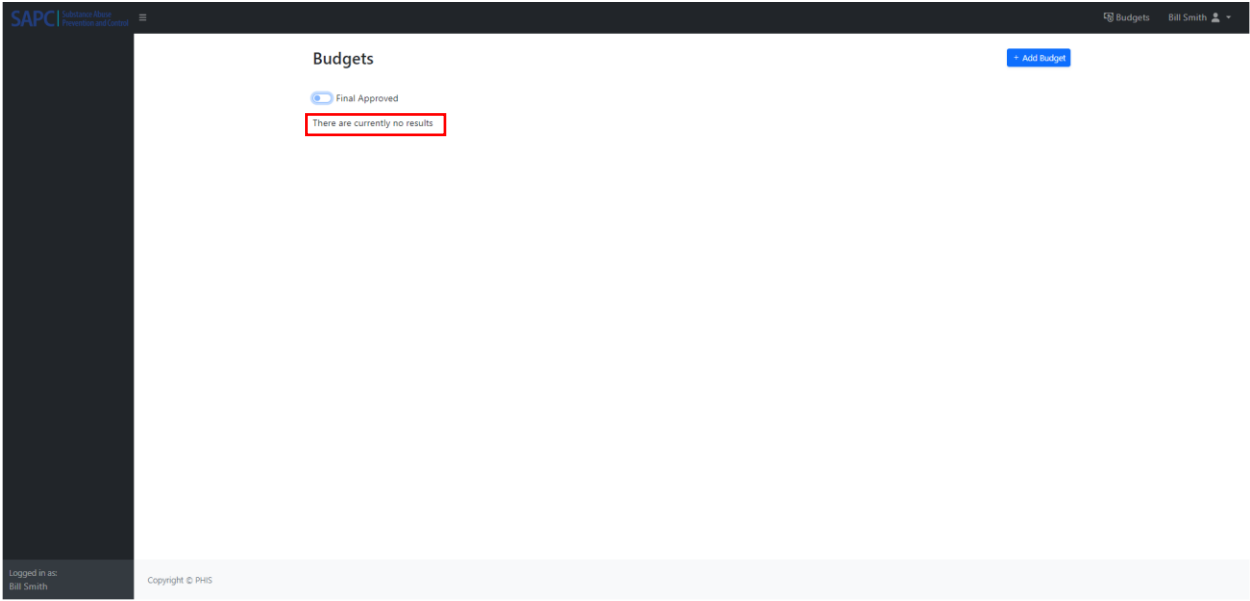
Date	Department	Status	User	Notes
------	------------	--------	------	-------

Logged in as: Bill Smith
Copyright © PHIS

The system will display the Budgets page and a blue banner will appear confirming the information was saved successfully.



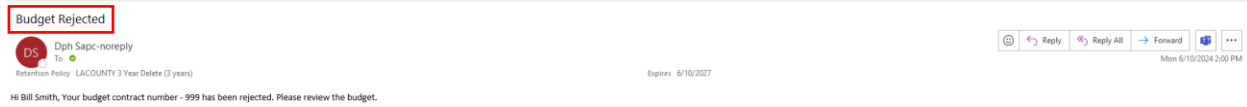
When there are no open pending budgets, the Budgets page will display the message “There are currently no results”.



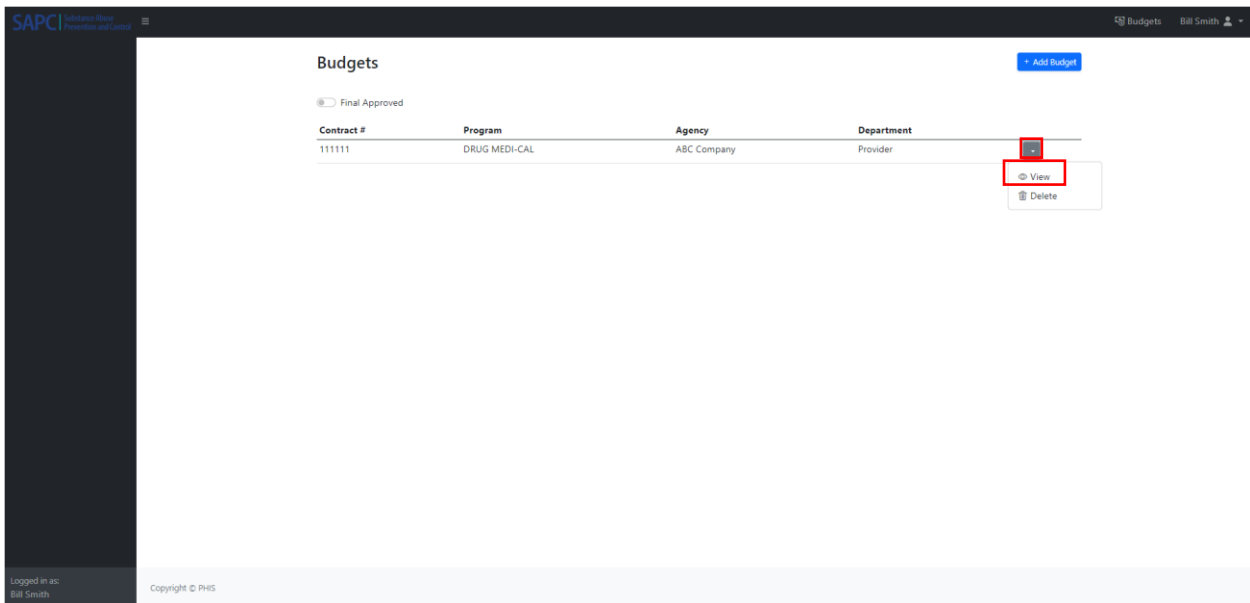
Resubmitting Revised Budgets

In the case that SAPC rejects a budget, the submitting provider will receive an email notification alerting them that it has been rejected. The rejected budget will appear in the Budgets page for the provider to access it so that they can review and make the necessary edits before resubmitting it to SAPC for approval.

Sample Budget Rejection email sent by SAPC to the submitting provider



To resubmit a revised budget, you first need to access it following the same instructions to view or edit an existing budget. First you click on the down arrow icon to the right of the status for the desired Contract #. Then select the view icon to open the budget.



The budget will open on the Summary page in which you will see the breadcrumb navigation bar and a blue banner with the word "Revised" on the top right corner of the page.

The screenshot shows the SAPCI Summary page. At the top, there is a navigation bar with tabs: Provider Review, Contract Review, Program Review, Finance Review, and Contract Final Review. The 'Provider Review' tab is highlighted. Below the navigation, there are three main sections: Information, PART I: Budgeted Direct Costs, and PART II: Budgeted Indirect Costs. The Information section contains details about the program, contract, and contact information. The budget sections show a table of costs with columns for the item and the proposed budget amount.

Information

Type of Program: DRUG MEDI-CAL
 Contracted Agency Name: Healthy LAC
 D.B.A.:
 Contract Number: 55555
 Contract Term Start Date: 06/04/2024
 Contract Term End Date: 06/04/2024
 Contract Agreement From: 06/04/2024
 Contract Agreement To: 06/04/2024
 Fiscal Year: FY2024-2025

Address: 777 Vermont
 City: Los Angeles
 Zip Code: 90001
 Agency Tel. Number: (111) 111-1111
 Fax Number: (222) 222-2222
 Contact Person: Jill Smith
 Primary Email Address: jsmith@healthylac.gov
 Contact Phone Number: (333) 333-3333

PART I: Budgeted Direct Costs

	Proposed Budget
Salaries / Wages & Employee Benefits (Part1 of MTDC) \$	26250.00
Facility Rent / Lease \$	0.00
Equipment and/or Other Asset Leases \$	0.00
Other services & Supplies (part 2 of MTDC) \$	5000.00
Charges for patient care, tuition remission \$	0.00
Total Direct Expenses: \$	31250.00

PART II: Budgeted Indirect Costs

	Proposed Budget
Federally Approved ICR %	20.00

By scrolling down to the bottom of the Summary page, you can review the Budget Approval History table. Here the current budget history will appear showing the current status of the budget. To access any notes which explain the reason for the requested revision(s), click on the notes icon next to the department requesting the revision.

The screenshot shows the bottom portion of the SAPCI Summary page. It includes a section for PART III: Total Income / Review, a Notes input field with a Submit button, and a Budget Approval History table. The table has columns for Date, Department, Status, User, and Notes. The first row shows a rejected status for the Contracts and Grants (C&G) department, and the second row shows an approved status for the Provider department. A red box highlights the Status column and the Notes icons for both rows.

PART III: Total Income / Review

	Proposed Budget
SAPC Contract Amount \$	1111.00
Participant / Client Fees \$	1111.00
Private Funding / Donation \$	111.00
Public Assistance \$	111.00
Program Investment Fund \$	111.00
60 Day Operating Reserve \$	10000.00
Total Income / Revenue \$	12555.00

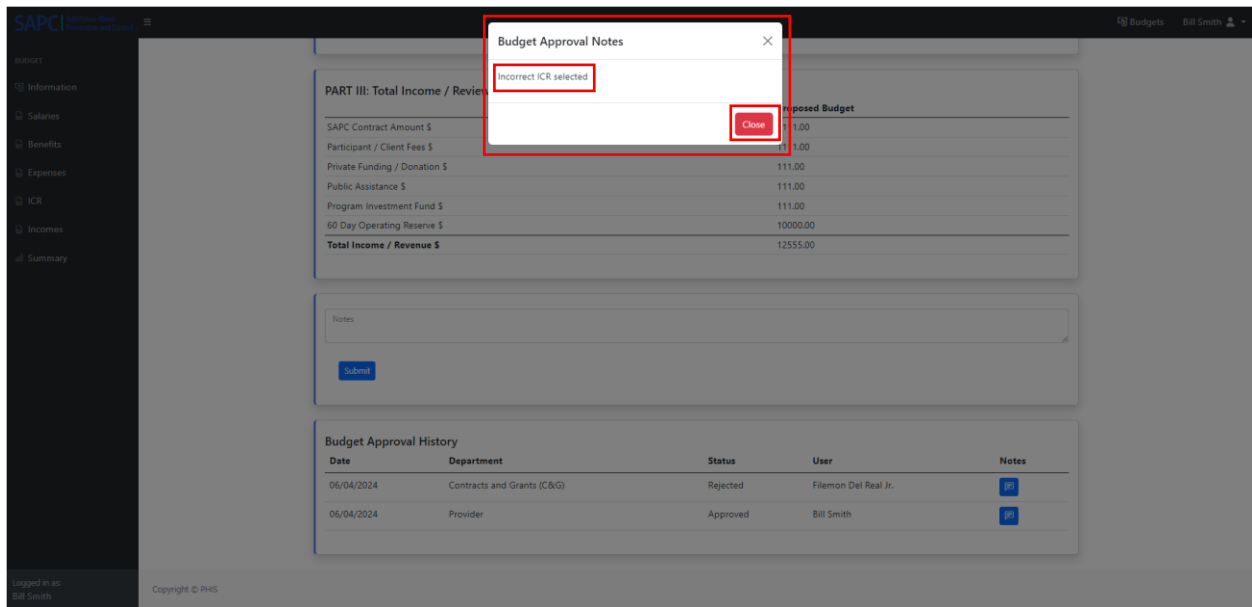
Notes

Submit

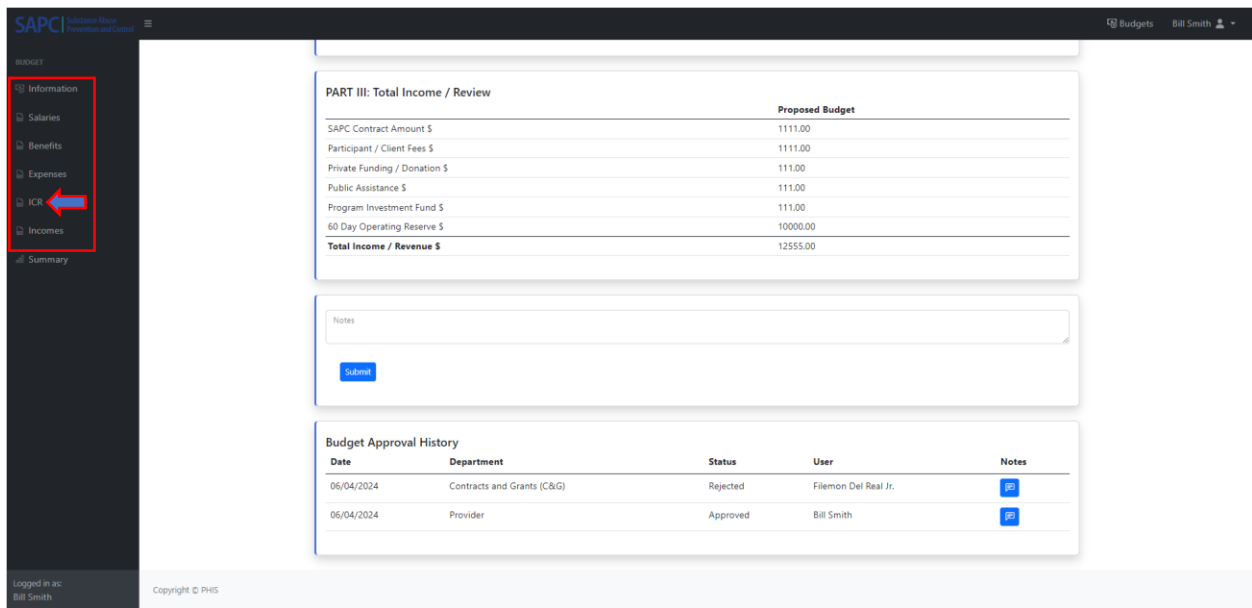
Budget Approval History

Date	Department	Status	User	Notes
06/04/2024	Contracts and Grants (C&G)	Rejected	Filemon Del Real Jr.	
06/04/2024	Provider	Approved	Bill Smith	

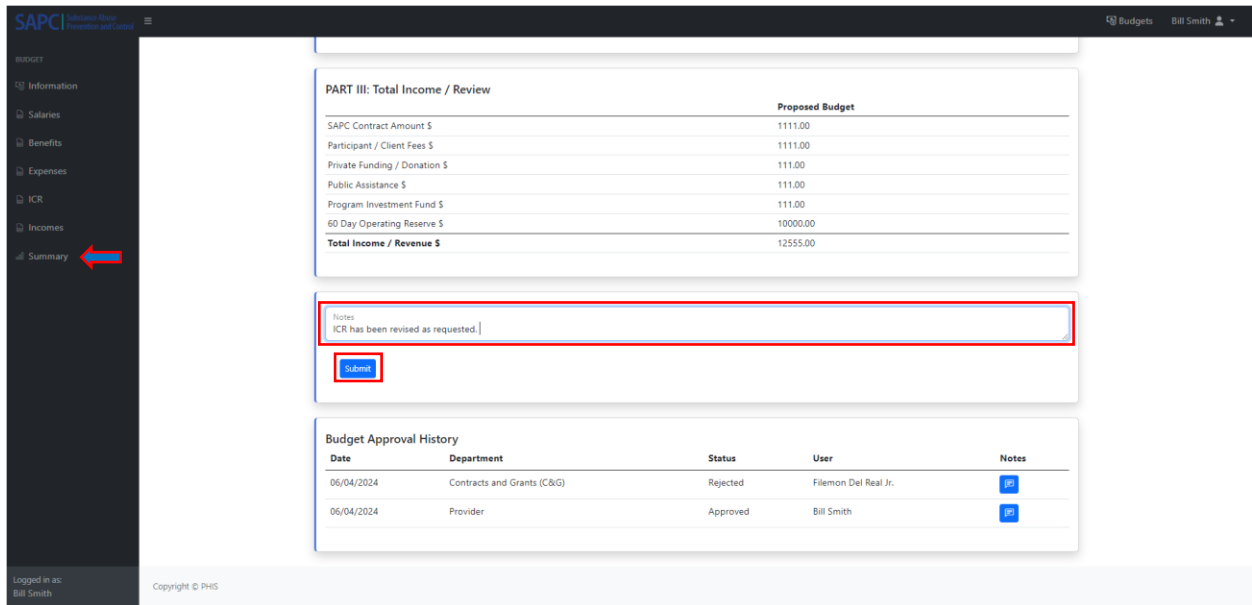
A pop-up box titled Budget Approval Notes will appear with a note box. If you find you need clarification or additional information regarding the requested revision(s), please reach out to your SAPC contact for assistance.



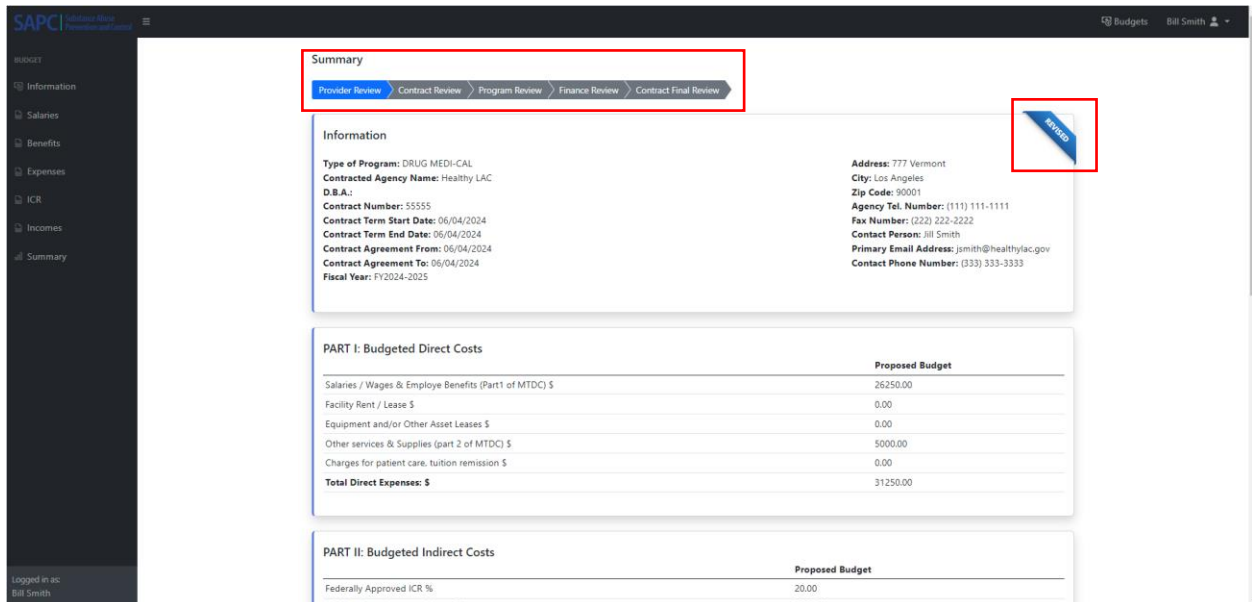
If the notes provide the necessary information to make the revisions, you can access the section of the budget in question by clicking on the Budget component needing the revision which in this case is the ICR section.



After making the needed revision(s), access the Summary page to add any notes and then re-submit the budget.



The system will display the top of the Summary page with the breadcrumb navigation bar and a blue ribbon indicating the budget has been revised.

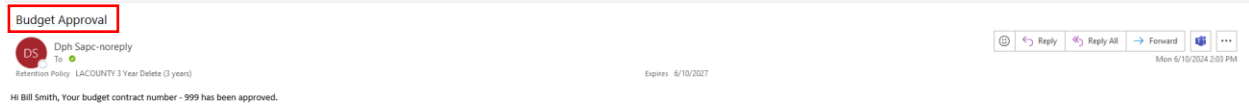


Final Approved Budgets

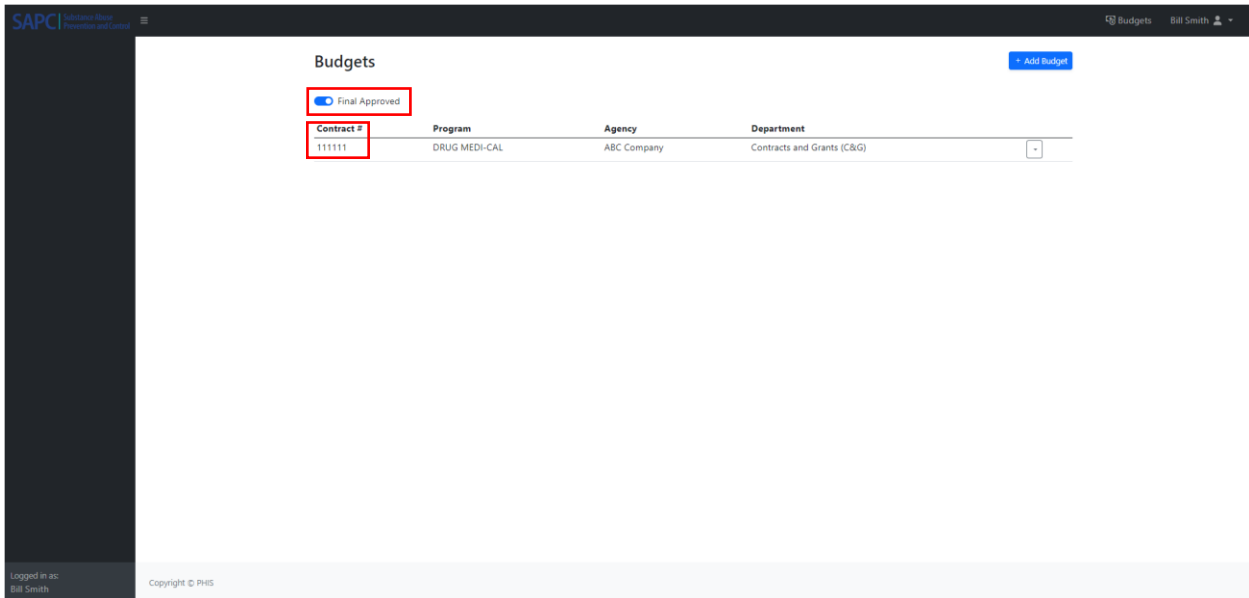
Once SAPC reviews and approves your Agency’s budget, it is considered a “Final Approved Budget” and it is available for viewing.

In addition, the submitting provider will receive an email notification informing them that their budget has been approved.

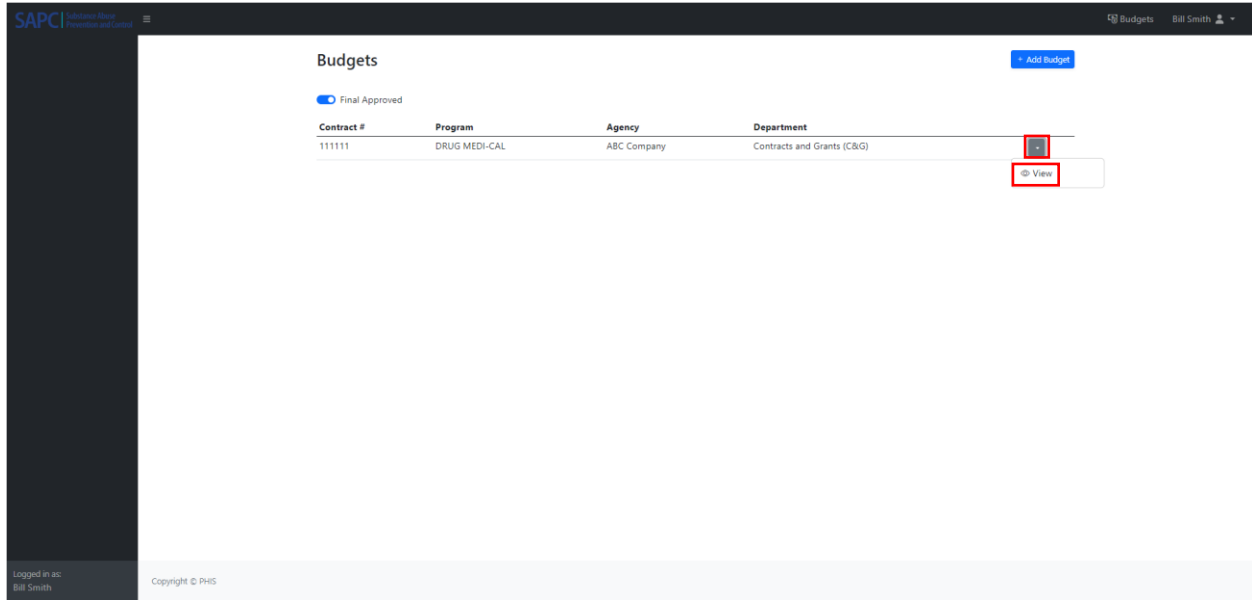
Sample Budget Approval email sent by SAPC to the submitting provider



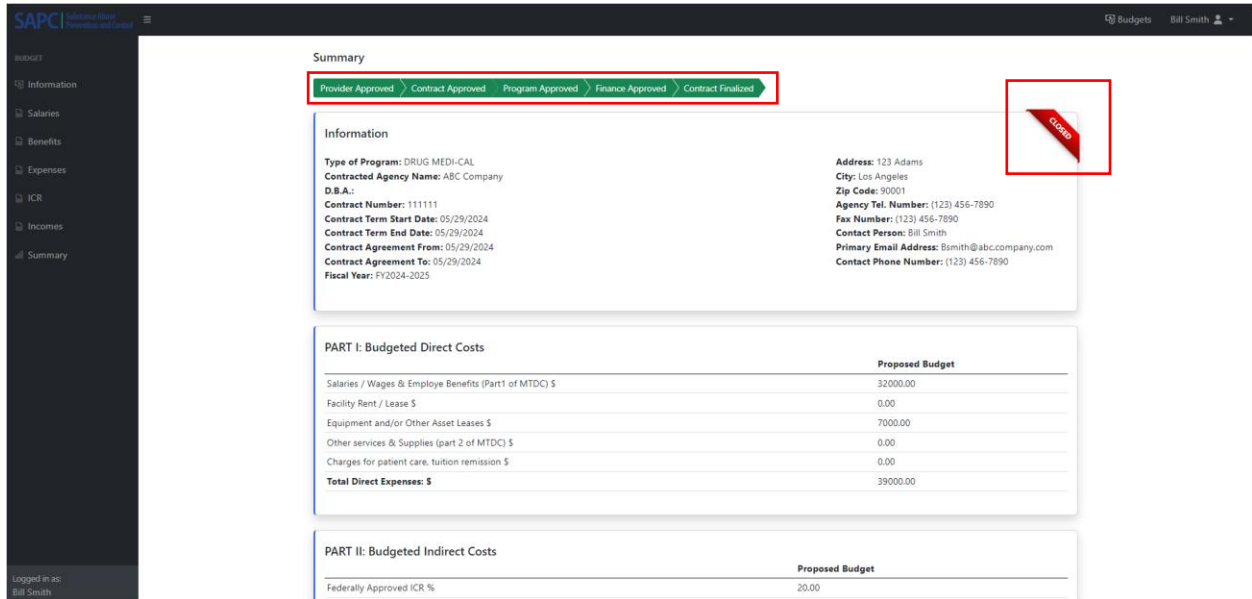
A Final Approved Budget cannot be edited and is viewable in a read only format. To review a complete budget simply click on the “Final Approved” toggle button filter on the Budgets page which will populate a list of budgets(s) submitted by the Agency, the logged in user is part of. The list will show budget contract number as shown below:



To access an approved budget, click on the drop-down arrow at the far right of table and then click on the view icon.



The Summary page will appear with a green filled breadcrumb navigation bar and a red ribbon indicating the budget has been closed.



By scrolling down to the bottom of the Summary page, you can review the final Budget Approval History table. The complete budget history will appear here showing all of the actions taken during the budget review and approval process.

The screenshot displays the SAPCI Budgets Summary page. The top section shows 'Indirect Cost \$' at 1400.00. Below this is a table titled 'PART III: Total Income / Review' with a 'Proposed Budget' column. The table lists various income sources and their amounts, totaling 15000.00. At the bottom, a 'Budget Approval History' table is highlighted with a red border, showing a list of approvals with columns for Date, Department, Status, User, and Notes.

PART III: Total Income / Review				
	Proposed Budget			
SAPC Contract Amount \$	1000.00			
Participant / Client Fees \$	1000.00			
Private Funding / Donation \$	1000.00			
Public Assistance \$	1000.00			
Program Investment Fund \$	1000.00			
60 Day Operating Reserve \$	10000.00			
Total Income / Revenue \$	15000.00			

Budget Approval History				
Date	Department	Status	User	Notes
05/30/2024	Contracts and Grants (C&G)	Approved	Filemon Del Real Jr.	
05/30/2024	Finance	Approved	Filemon Del Real Jr.	
05/30/2024	Program	Approved	Filemon Del Real Jr.	
05/30/2024	Contracts and Grants (C&G)	Approved	Filemon Del Real Jr.	
05/29/2024	Provider	Approved	Bill Smith	PDF