

# User Guide for Manual Reporting of the Quarterly Performance Report (FORM 10)

## Overview

The Quarterly Performance Report (referred to hereafter as QPR) is to be used by state agencies as a tool for planning and documenting performance. It is required that each state agency input a minimum of one goal and one performance objective into their QPR. As directed in Section 41-19-11 of the Budget Management Act (Code of Alabama 1975), each state agency/department is required to submit a performance report. These requirements will be accomplished through a new report titled “Quarterly Performance Report (FORM 10)”. This guide will walk users through the manual process of downloading a hardcopy of the reporting template and the steps necessary to input annual and quarterly data into the template.

## General Instructions

1. Accessing the Form: From the home page of the Executive Budget Office web site ([www.budget.alabama.gov](http://www.budget.alabama.gov)), click on Documents and Forms in the task bar. Select “Quarterly Performance Reporting Template and Instructions” (Manual Reporting). When the page opens, select either the QPR Excel Template or the Instructions.
2. Inputting Initial Data (Mission-Vision-Goals-Objectives-Targets): **Initial data submission into QPR reports for each new fiscal must be completed with the new fiscal year Operation Plan.**

To input data into a text field, simply click your mouse inside of the text box and begin typing. Typically, data should be entered into the excel template in the following order:

- a. Change the fiscal year to reflect the fiscal year being reported.
- b. Enter Agency Mission (“Mission” should represent the purpose of the Agency).
- c. Enter Agency Vision (Agency “Vision” should reflect the long term goal of where the agency would like to be if all annual goals and objectives are met).
- d. Enter Annual Goals.
- e. Enter Objectives. You will need to include a unit of measure for each Objective, as well as the Goal # that correspond with the Objective.
- f. Quarterly and Annual Target data should now be added to the template. Annual Targets do not necessarily have to be the sum of each of the 4 quarter targets data.
- g. After inputting an Objective and its corresponding target data, users can enter any notes in the Notes field at the bottom of the template.
- h. When all Mission-Vision-Goals-Objectives-Target data have been entered, Save the Document to your computer, and email a PDF copy to your budget analyst at the Executive Budget Office.

3. Inputting Actual Quarterly Results for Each Objective: Actual data should be entered by the last business day of the month following the end of each fiscal year quarter.

- a. Open the QPR Report that you previously saved on your computer. For each Objective, enter the correct data in the appropriate quarter's "Actual" column and save the document back to your computer.
- b. Target Data should not change during the FY, the only data required each quarter is the actual data from the previous quarter.
- c. Once you have completed submitting all actual data for a quarter, email a PDF copy of the QPR to your Budget Analyst at the Executive Budget Office.

4. Reviewing your work: Before submitting a completed QPR to the Budget Office, please print a copy of the report and review the data for completeness and accuracy. Below is an example of a completed Quarterly Performance Report:

EBO Form 10

FY 13 Quarterly Performance Report

Agency: 064 - State Health Planning and Development Agency

Mission: To administer a Certificate of Need program to assure that healthcare services and facilities offered and developed are in the public's interest, and to prevent the construction of unnecessary and inappropriate healthcare facilities and services.

Vision: Gather and provide adequate information in the determination of need for additional/improved healthcare facilities, services, and equipment.

Annual Goals	1	2	3
	To complete processing and data entry of healthcare utilization, as reported by healthcare facilities via annual reporting forms, within 270 days of submission by FY2015, thereby continuously strengthening the Certificate of Need process through accurate and timely publication of data.		
		To collect and process for release Patient Origin Survey data within 270 days of submission deadline by FY2015.	

Quarterly Objectives and Targets:

Performance Objectives	Goal	Unit of Measure	First Quarter		Second Quarter		Third Quarter		Fourth Quarter		Annual	
			Target	Actual	Target	Actual	Target	Actual	Target	Actual	Target	Actual
1 The number of annual reports verified, entered, corrected, and published in accordance with the Alabama State Health Plan, i.e. after publishing data and subsequent release, statistical updates are generated as required by the Alabama State Health Plan and the Certificate of Need Rules & Regulations.	1	# of reports in database	148	148	248		240		874		1510	
2 The number of Patient Origin Surveys completed by healthcare facilities, and published through SHPDA for use by healthcare facilities, trade organizations, and agency staff.	2	# of Surveys in datasets	120	240	120		120		120		480	
3												

Notes