

A cloud-based solution to help city Auditors/Comptrollers/Finance electronically receive, process and archive budget appropriation requests

Key Features of Solution



Request Submission

- ✓ Authorized department staff logs into Portal
- ✓ Selects Process management and Budget Appropriation Request Workflow
- ✓ Completes Budget appropriation request form, attaches any supporting documents
- ✓ Selects department head and initiates workflow



Department Head Approval of requests

- ✓ Department head logs into portal
- ✓ Reviews requests in their in-box
- ✓ If any information is missing or if there are errors, Rework button is used to send the request back. Errors can also be fixed by the approver
- ✓ If everything is correct, step is approved and the workflow moves onto Auditor Department



Processing of Requests and Archival

- ✓ Auditing department reviews Budget Appropriation Request tracking form
- ✓ Confirms availability of funds and that needed authorizations are obtained from Commissioners and council members
- ✓ Completes updating of financial system and Portal tracking database fields
- ✓ Creates a request package comprising of request, attachments, dispositioning info.
- ✓ Pushes the PDF version of this package to BAR records file cabinet



Benefits of digital BAR solution

- ✓ Eliminates paper and speeds up the process
- ✓ Archival of all supporting documents becomes easier
- ✓ Request status can easily be queried by request party
- ✓ State auditors can be provided access to Budget file cabinets for audit trails and audit records
- ✓ Requests can be made any time