

GHANA HEALTH SERVICE



PLANNING AND BUDGET MANAGEMENT INFORMATION SYSTEM (PBMIS) MANUAL



THE GENERIC PLANNING AND BUDGETING PROCESS



IN PARTNERSHIP WITH



THE WORLD BANK

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DISCLAIMER

This document is provided by the Ghana Health Service (GHS) for information purposes only to authorized users of the Planning and Budget Management Information System (PBMIS). The information contained in this document is subject to change without prior notice to users. Any improvements or changes to either the product (i.e. software) or the document will be documented in subsequent editions. It is envisaged that this document should not be photocopied, reproduced, stored in a retrieval system, transmitted in any form or by any means, or translated into another language without the prior written consent of the Developer and GHS.

It is required that this document should be used alongside other planning and budgeting capacity building documents that are institutionally prescribed within the health sector and GHS.

ACKNOWLEDGEMENT

The funding for the current version of the PBMIS and accompanying manual was provided by Vital Strategies, World Bank, UNICEF and Gavi.

We wish to acknowledge the expert and technical input of the following persons who worked tirelessly to ensure the successful development of the PBMIS:

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Mr. James Avoka	All Regional HR Officers
Mr. Ernest Owusu Sekyere	All Regional Accountants
Ms. Edith Akosua Mansah	All Regional Administrators

ACRONYMS

BMC	Budget Management Centres
BoD	Burden of Disease
CHPS	Community -based Health Planning and Services
DHD	District Health Directorate
DHIMS	District Health Information Management System
DHIMS	District Health Information Management System
GHS	Ghana Health Service
GIFMIS	Ghana Integrated Financial Management Information System
GoG	Government of Ghana
HR	Human Resource
HRIMS	Human Resource Information Management System
HSMTDP	Health Sector Medium Term Development Plan
ID	Identification
IGF	Internally Generated Fund
MoF	Ministry of Finance
MTEF	Medium Term Expenditure Framework
PBB	Program Based Budgeting
PBMIS	Planning and Budget Management Information System
PPMED	Policy Planning Monitoring and Evaluation Division
RHD	Regional Health Directorate
SDG	Sustainable Development Goal
SQL	Structured Query Language
SSMS	SQL Server Management Studio
SSNIT	Social Security and National Insurance Trust

FOREWORD

Planning and budgeting in the Ghana Health Service has been evolving over the past decade with the focus of improving the linkages between policy, planning, resource allocation and performance outcomes. Since 2011, some tools have been adopted including Marginal Bottleneck Budgeting (MBB) and the District Health Planning, Accounting and Reporting Tool (DIHPART) to develop plans and budgets, assess effectiveness of interventions and align resources to disease burdens.

Despite these efforts, the planning and budgeting process has maintained its laborious nature and faced a lot of challenges in the consolidation of the Service's annual plans and budgets. The use of manual basic excel templates, weak linkage between policy making, planning and budget, weak expenditure control, systemic challenges amongst others impeded the entire annual planning and budgeting process.

It is worth noting that the national planning and budgeting process also transformed from the traditional input-based budgeting to results-based budgeting using the Medium-Term Expenditure Framework (MTEF) principles. Moreover, the results-based orientation of the national budgeting process culminated in the adoption of the Program based Budgeting (PBB) approach. The PBB relates resources to proposed intervention and actual results. PBB provides important information on service delivery and promote transparency and accountability in resource allocation and use for service delivery. For PBB to thrive effectively, there was the need for adequate information about programs and user-friendly planning and budgeting tools at the implementation levels.

The Ghana Health Service amidst these challenges has developed a software called Planning and Budgeting Management Information System (PBMIS) which is an integrated solution for the preparation of comprehensive evidence-based and quality plans for goods and services, compensation and capital investment and to effectively align budget to policies and priorities and strategic interventions of the Service.

It is important to state that the PBMIS provides the application of service data from DHIMS 2 and the community scorecard to guide background service data and performance analysis to support the planning and budgeting process. Applying the data to inform resource allocation to policies and priorities means that Budget Management Centres will be able to address their local priorities using proven interventions.

The features of the system include a dashboard to monitor budget alignment to objectives, source of funds, coverage and disease burden, real time consolidation, consolidated workplans, creation of exportable files to MoF budget system (Hyperion) and integration with DHIMS2 and HRIMS. The outputs of the PBMIS is to generate reports for implementation of annual plans and budgets and also for the effective resource mapping and harmonization of resource allocation and activities during implementation to achieve efficiency gains.

I urge all managers involved in the planning and budgeting process to make adequate reference to the PBMIS manual to facilitate their planning and budgeting. It is also important that all Budget Management Centres utilize the PBMIS as the official platform of the Service for the preparation of their MTEF as well as Programme Based budgets.



DR. PATRICK KUMA-ABOAGYE
DIRECTOR GENERAL
GHANA HEALTH SERVICE

ABOUT THE PBMIS

The Planning and Budgeting Management Information System (PBMIS) is an integrated solution for the preparation of comprehensive plans and budget covering IGF Revenue Projections, Goods and Services, Compensation and Capital Investment.

The purpose of the PBMIS manual is to serve as a guide for the use of the software product for the preparation of the Annual Medium Term Expenditure Framework (MTEF) and Program Based Budget (PBB). This is to be used in line with the planning and budgeting guidelines issued by the Ministry of Finance (MoF) annually and the comprehensive planning and budgeting manual of the GHS.

The manual is to be used at the respective levels of the GHS in order to facilitate smooth navigation, preparation, implementation and management of BMCs' plans and budget.

Specifically, the purpose of the manual are as follows:

1. Provide description on how to use the PBMIS.
2. User guide for generating required reports at various levels for management decision making.
3. A quick reference guide for generating outputs for capturing of budgets at the national level.
4. It also serves as basis for addressing frequently asked questions and responding to user challenges as well as basic troubleshooting.
5. Additionally, there is a section on Case Studies aimed at providing hands-on training for the users.

Note: Users are advised to thoroughly read the manual before attempting to use the PBMIS.

OBJECTIVES OF THE PBMIS

The PBMIS is designed to achieve the following objectives:

- Effectively align budget to policies and priorities and strategic interventions of the sector;
- Enhance the planning and budgeting for all known sources of funding;
- Enhance the undertaking of various forms of budget analysis and reports;
- Strengthen budget implementation management;
- Facilitate the generation of consolidated plans and budgets for ease of capturing into the national budget system;
- Contribute to the achievement of organizational objectives through the efficient utilization of available resources; and
- Improve the efficient use of allocated resources.

STRUCTURE OF THE MANUAL

The manual has been structured into two parts as follows:

Part A- Technical (Administration) Section: This section provides an overview of the PBMIS systems requirements and then delves into the installation process and how to update an existing installation. Further, it touches on how to set up the PBMIS and finally, how to back up the database and restore it.

Part B – End User Section: This section deals with how to use the PBMIS focusing on IGF Revenue Projection, setting up revenue ceilings for BMCs to control their Expenditure Budget, the reserved budget and downloading of budget ceilings. It further touches on the Compensation as well as the Goods and services budget.

Also highlighted are how to print the various budget reports, prepare Activity work plan, and print consolidated procurement plan. The Capital Expenditure module, which is used to capture all government projects for the BMC is also focused on.

Additionally, it addresses how to prepare the Activity implementation plan, generate consolidated reports and build a Dashboard. The section ends with printing of BoD, Coverage and Budget Reports.

PART A- TECHNICAL (ADMINISTRATION) SECTION

SYSTEM REQUIREMENTS

Compatibility Guide

To install PBMIS, ensure that your hardware and your operating system are correctly configured and fully operational. Find below a complete list of hardware and operating system requirements:

Database server operating systems

Microsoft SQL Server 2017 or higher on Windows 8 or higher are supported for use as the database server for PBMIS 2020.

Note the following points:

- Microsoft SQL Server Enterprise and Standard are supported.
- For Microsoft SQL databases, we recommend using a binary collation method, such as Latin1_general_bin.
- See Microsoft's websites for limitations of their databases.

PBMIS application server operating systems

The 64-bit versions of Windows 10 (Pro and Enterprise editions) are supported as the workstation operating system for PBMIS 2020.

Note:

Windows 7: Professional, Enterprise, and Ultimate editions have not been tested with PBMIS 2020.

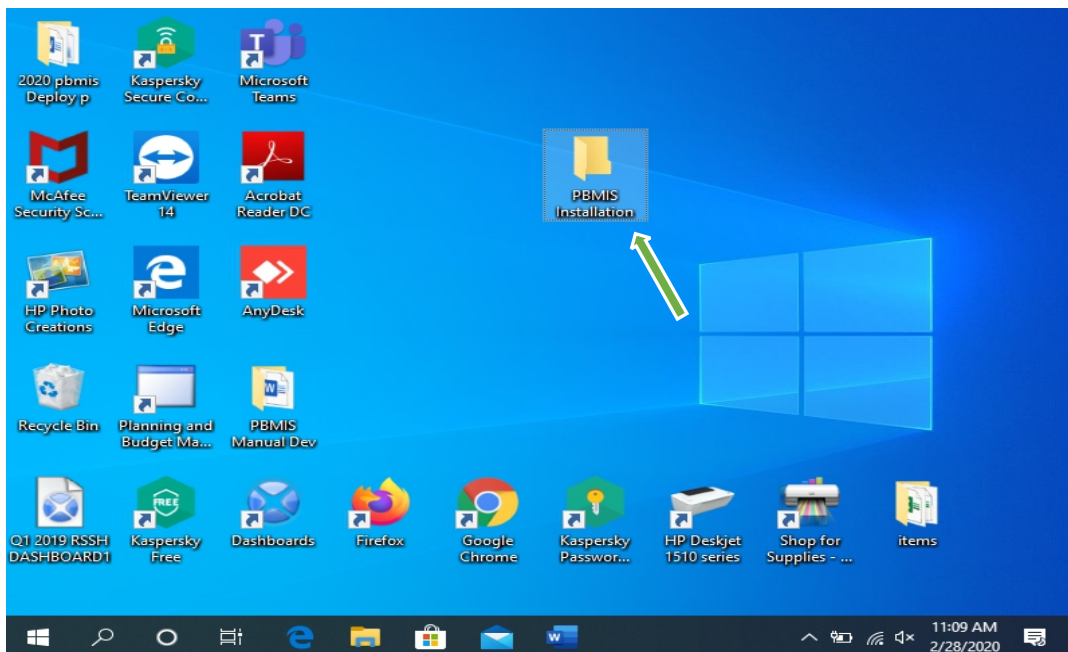
Support may not be available for problems that may occur on non-supported operating systems.

Microsoft Excel 2013, 2016 (32-bit), or 2019 (32-bit) is required on each workstation running PBMIS for importing files into PBMIS.

INSTALLATION

Pre-Installation

Copy the PBMIS Installation folder provided by GHS onto the desktop

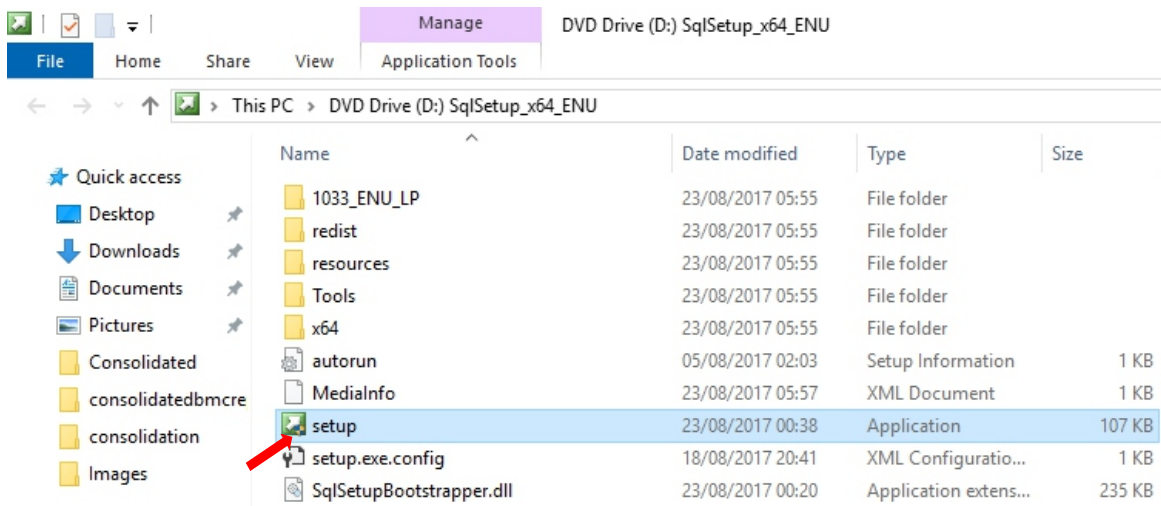


How to Install Microsoft SQL Server 2017 Standard or Enterprise Edition

Follow the steps below:

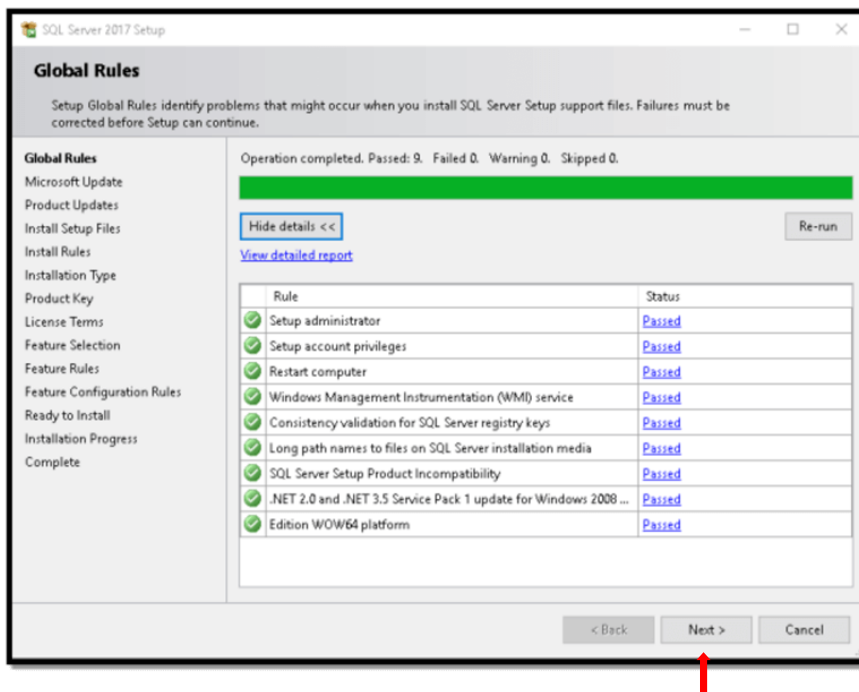
1. Open the PBMIS Installation folder
2. Open the folder named SQL Server
3. Double click on SQL Server2017-x64-ENU or right-click on SQL Server2017-x64-ENU and open with windows explorer

4. Double-click on setup to open the SQL Server 2017
5. From the pop up window click on “Yes” to launch the SQL Server Installation Centre

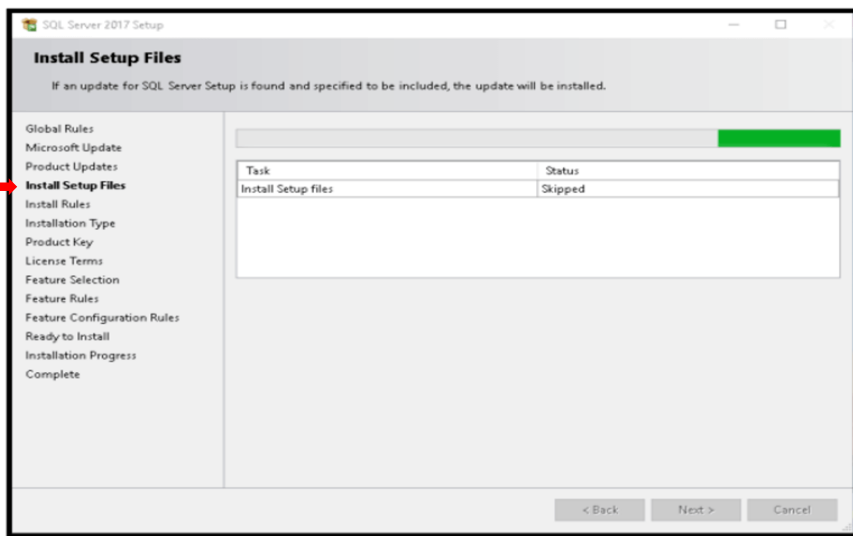


6. Click on Installation on the left pane (side).
7. Click on “New SQL Server stand-alone installation or add features to an existing installation”. **Wait a while for the SQL Server 2017 Setup to open.**

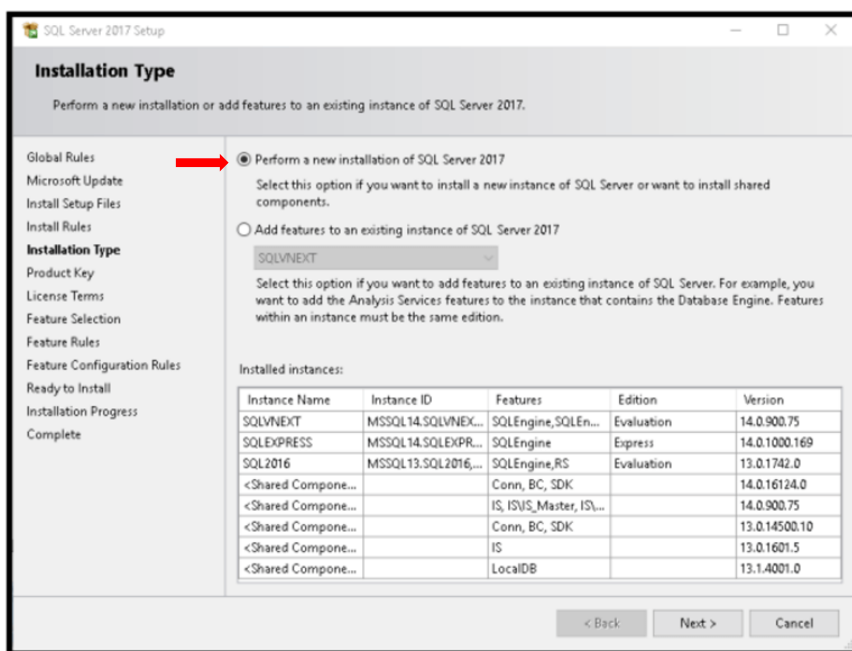
NB: In the next window, depending on the compatibility of your computer the SQL Server setup checks for Global Rules. Global Rules identify problems that might occur while installing SQL Server setup support files. If there is any failure, it must be corrected before proceeding further.



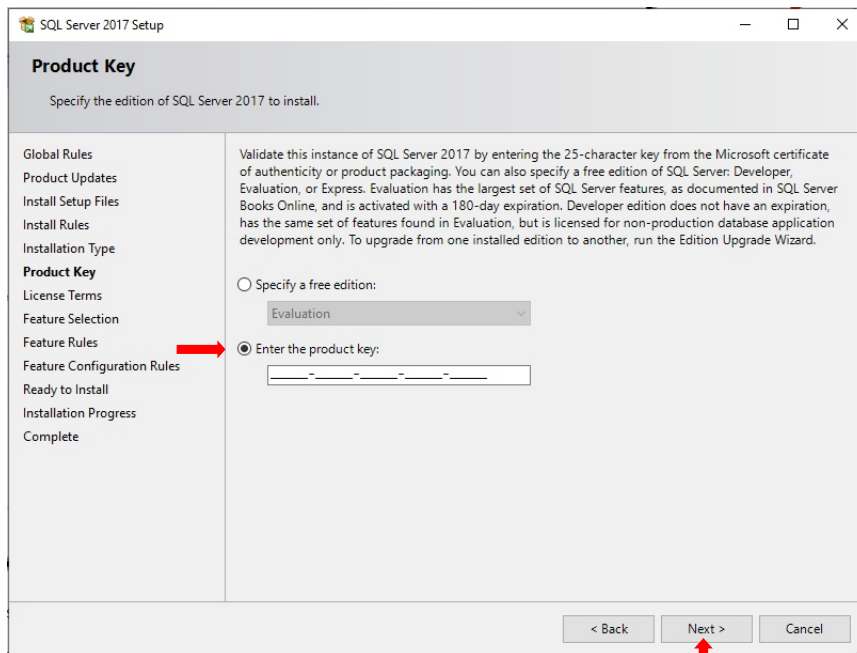
8. If all the Global Rules have status as passed, click on next to go to the next screen.
9. Next, install setup files. If files are already present, skip this step.



10. For a fresh or new installation of SQL Server 2017, select the option "Perform a new installation of SQL Server 2017". This is set as the default option.

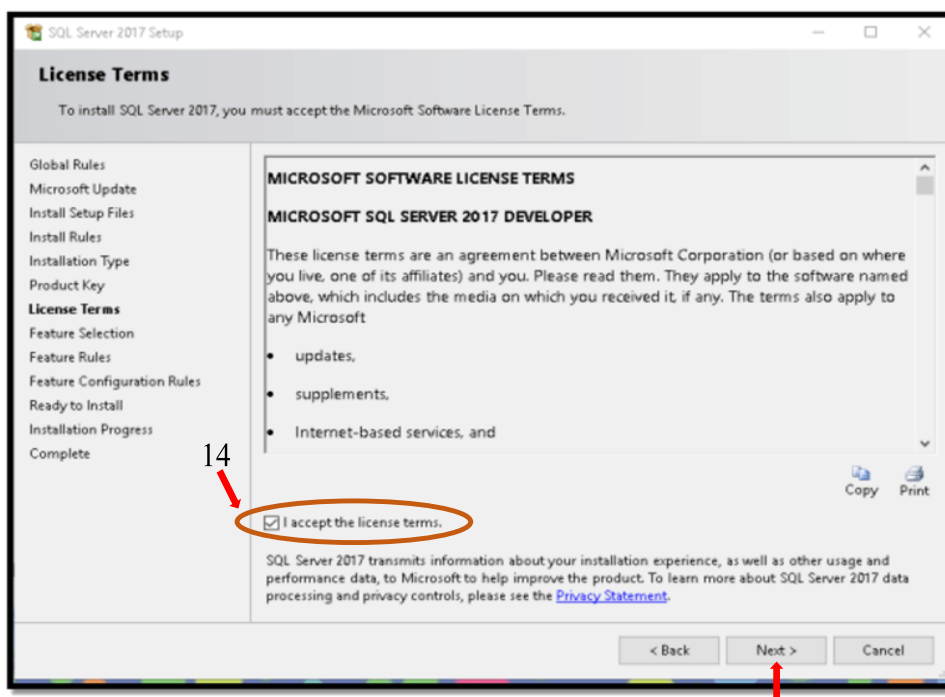


11. Select "Enter the product key"
12. Key in the product key provided by GHS.



13. Click on the next button

14. Accept the License Terms and click on the next button

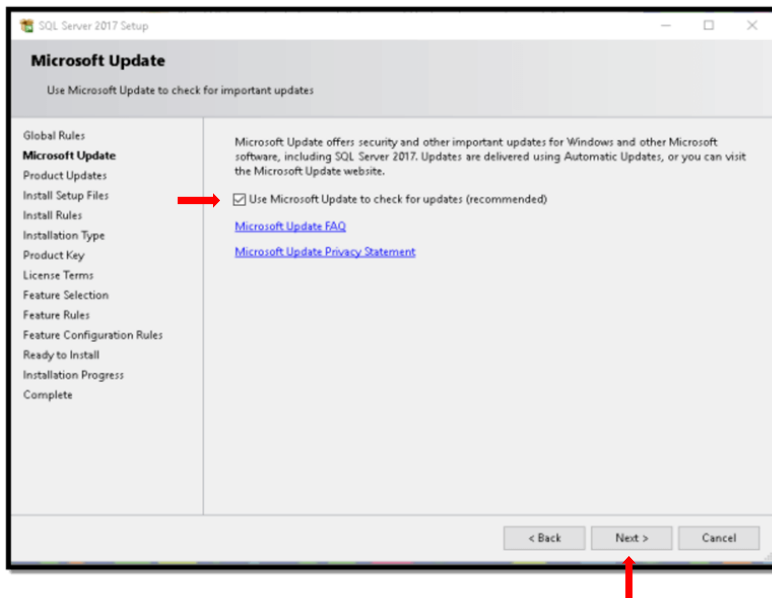


15. In the next window, the SQL Server setup checks for Global Rules. Global Rules identify problems that might occur while installing SQL Server setup support files.

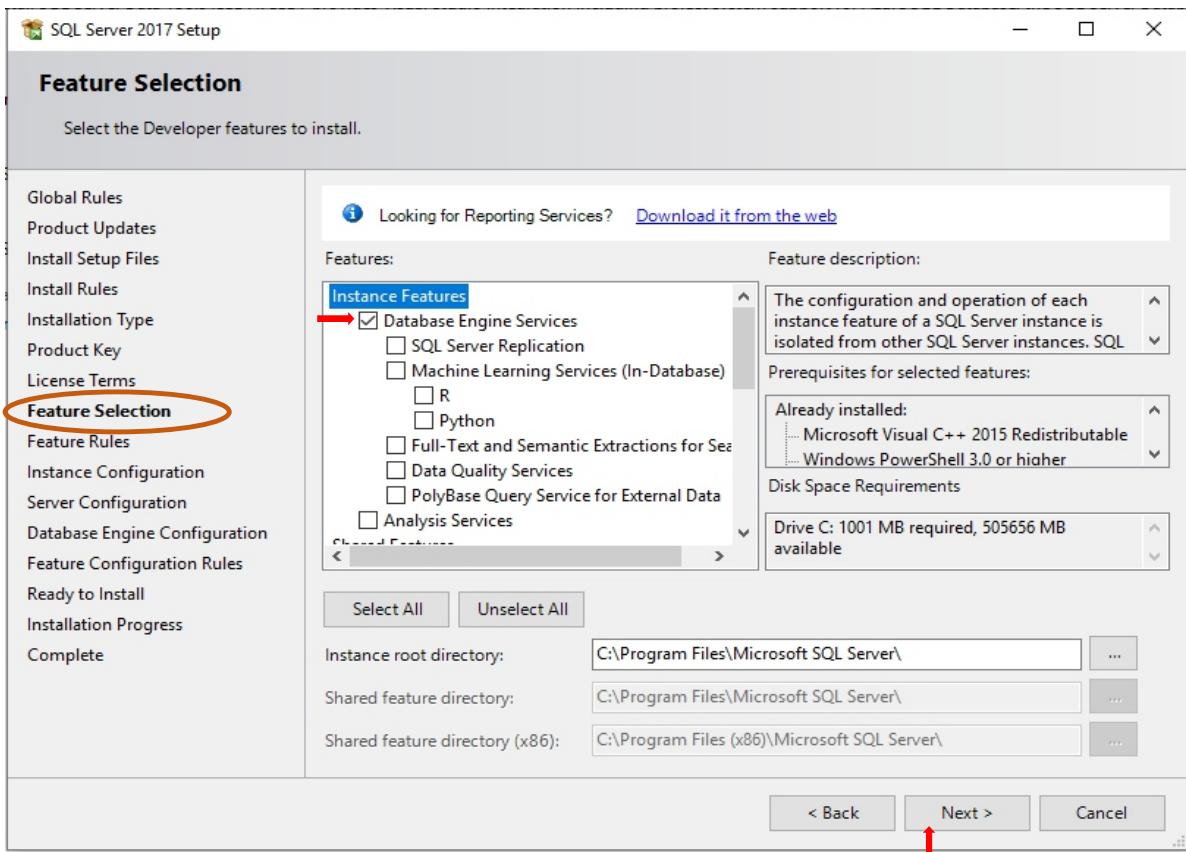
If there is any failure, it must be corrected before proceeding further.

16. In the next window, select “Use Microsoft update to check for updates”

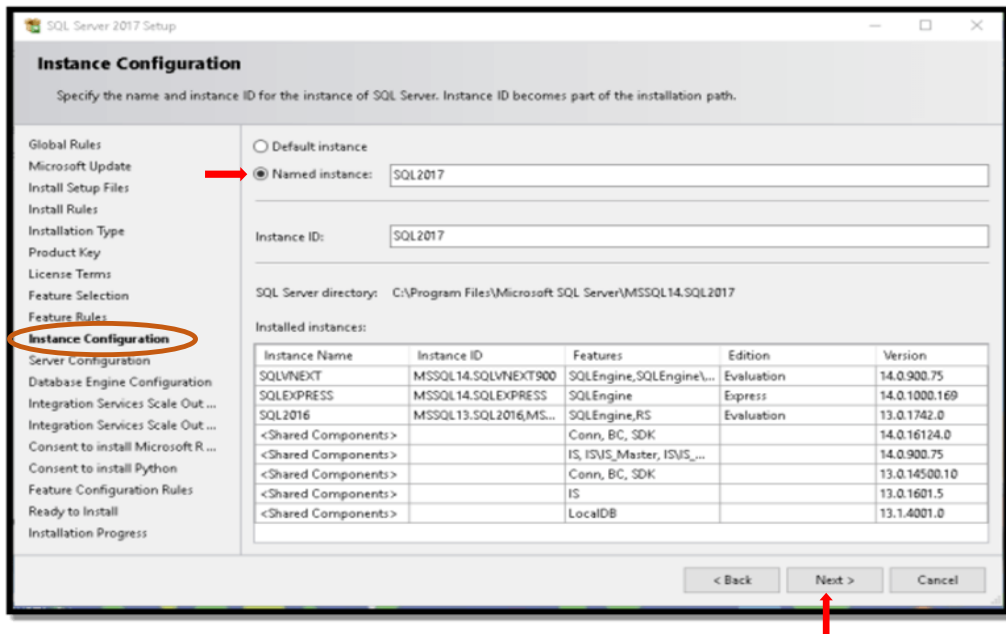
NB: For the necessary update to run, you should be connected to the internet.



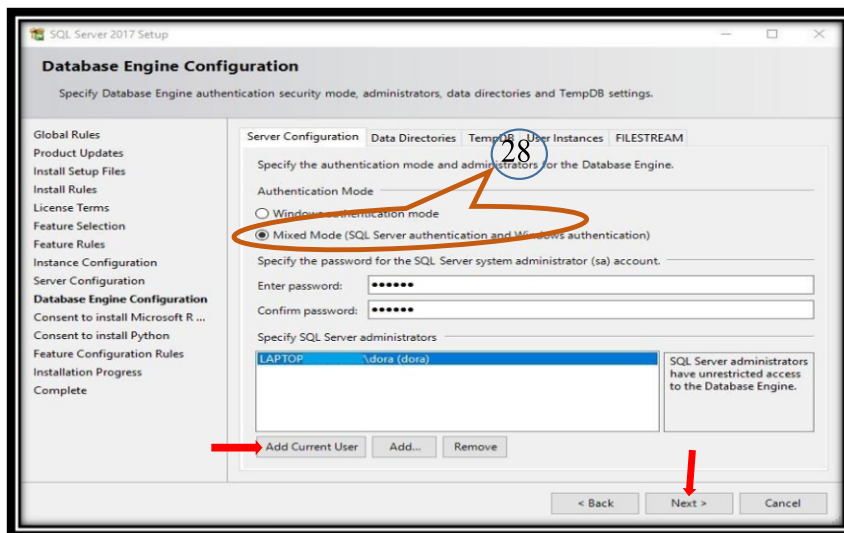
17. Click on the next button to continue
18. Click on the next button to continue
19. Check the status to ensure that it is reading “passed” or “warning”
20. Click on the next button to continue
21. In the Feature Selection, select **Database Engine Services**



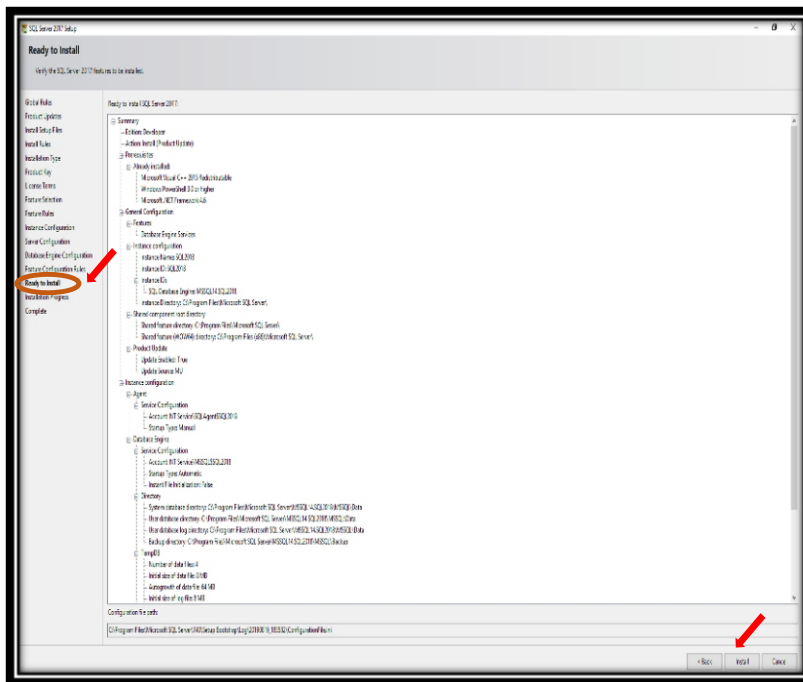
22. Click on the next button to continue.
23. In the Instance configuration, select named Instance and type “SQL2017”.



24. Click inside the Instance ID box. 'SQL2017' will then show as the Instance ID.
25. Click on the next button to continue
26. Click on the next button to continue
27. In the Database Engine Configuration window, select Mixed Mode (SQL Server Authentication and Windows Authentication).
28. In the Enter password text box, key in the password as provided by GHS.
29. In the Confirm password text box, repeat the password.



30. Click on Add Current user button to add the current user profile.
31. Click on the next button to continue.



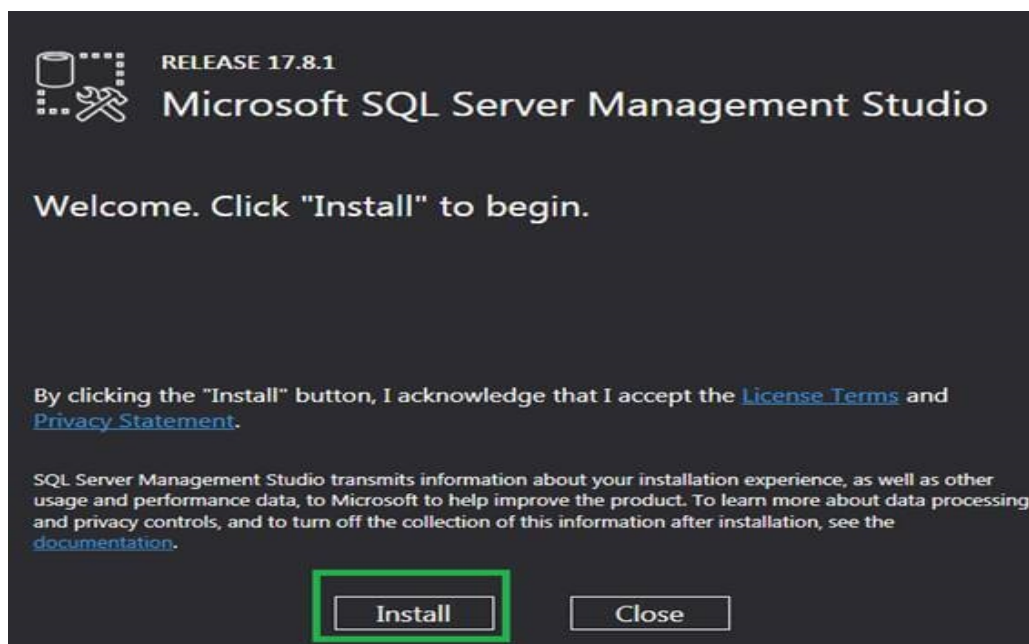
32. Click on the Install button to start the installation

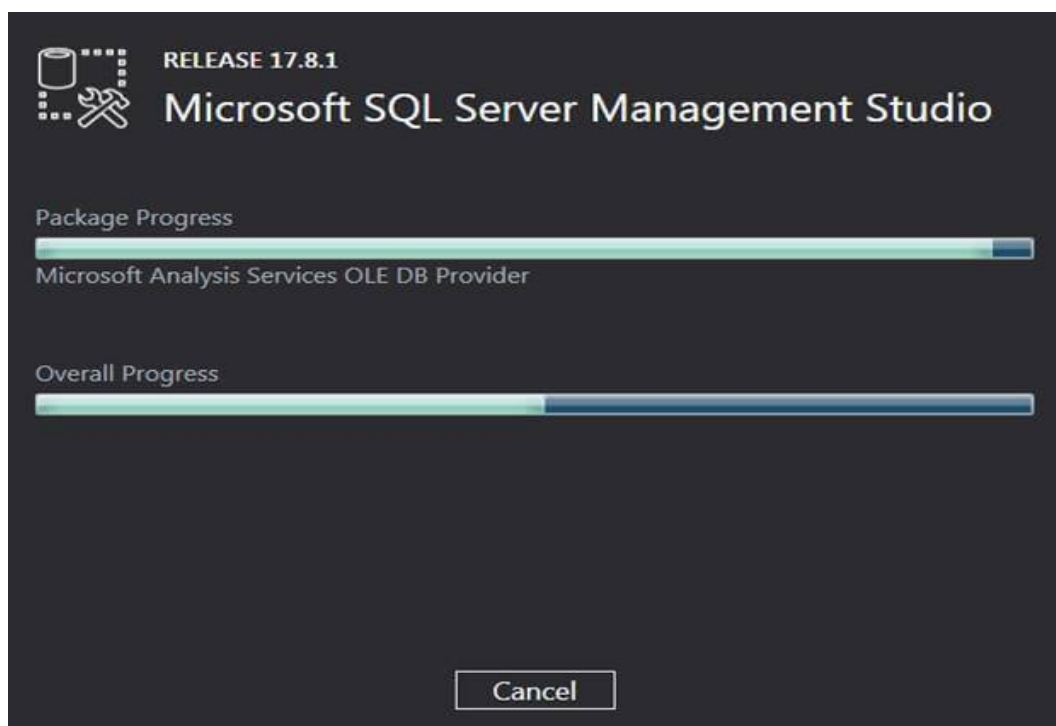
NB: For a successful installation, ensure that all the status indicate "succeeded"

33. Click on the close button

How to install SQL Server Management Studio 2017

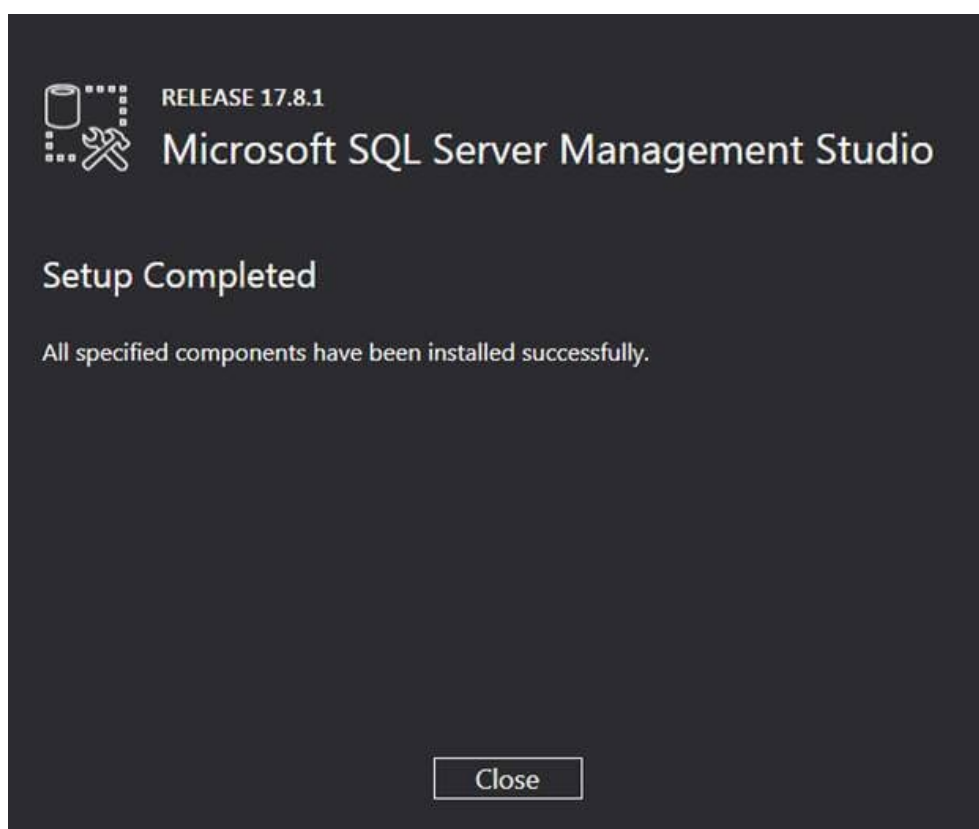
1. Double click on the "SSMS-Setup-ENU".
2. After double-clicking, click yes to continue installing the SQL Server Management Studio 2017.
3. Click the Install button.





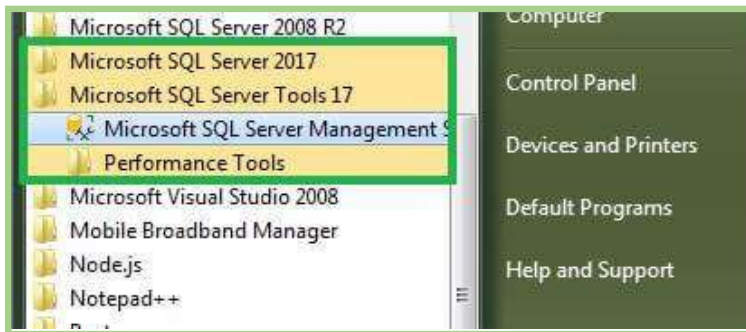
4. Wait until setup is completed and click the close button.

NB: Restart your computer in case you are prompted.

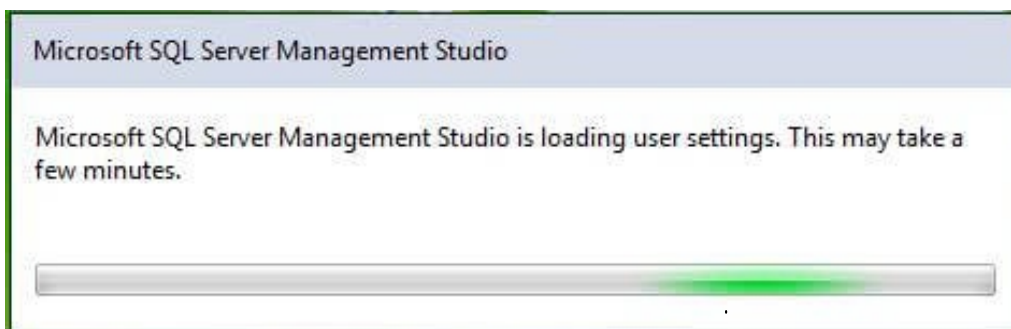


How to connect to the SQL Server

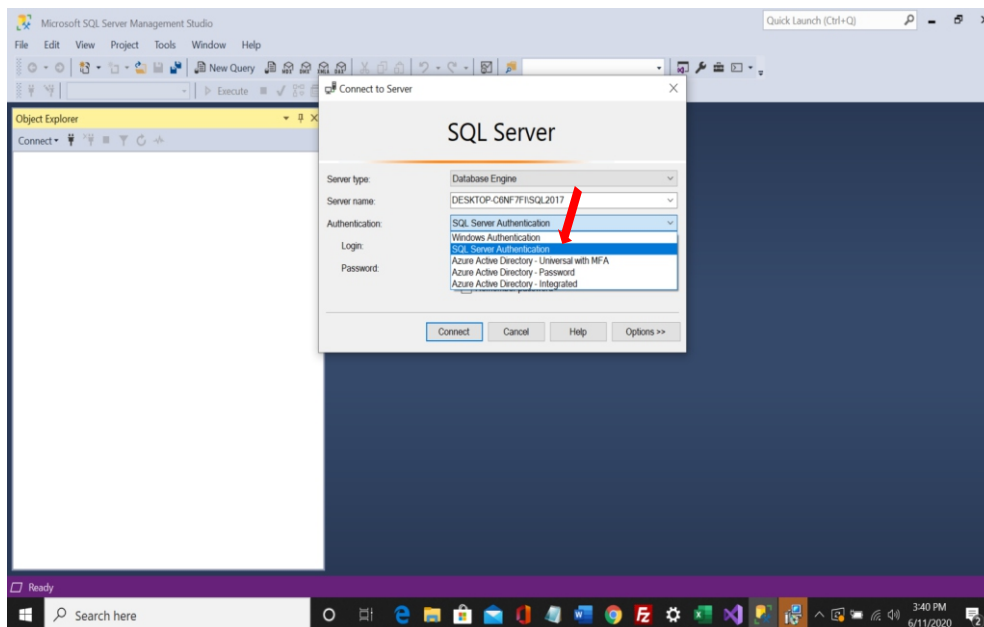
1. Go to all programs to locate the Microsoft SQL Server Tools 2017.
2. Under Microsoft SQL Server Tools 2017, Click on the drop down to see the Microsoft SQL Server Management Studio 17.



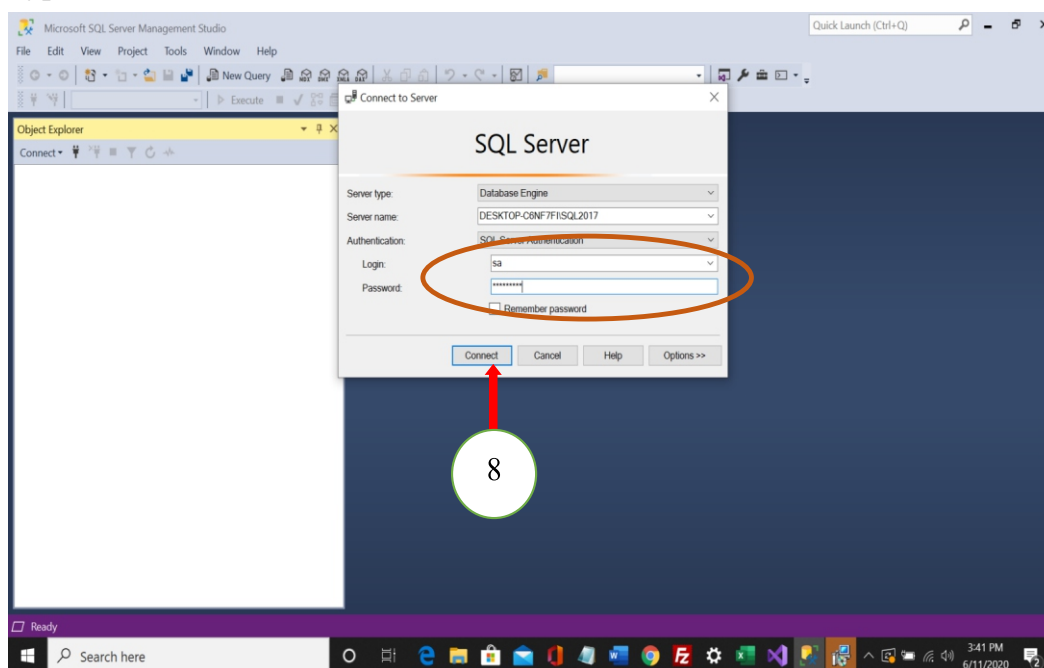
3. Double-click on the SQL Server Management Studio 17.



4. In the Authentication box, click on the drop down to select SQL Server Authentication



5. Type in the Username in text box.



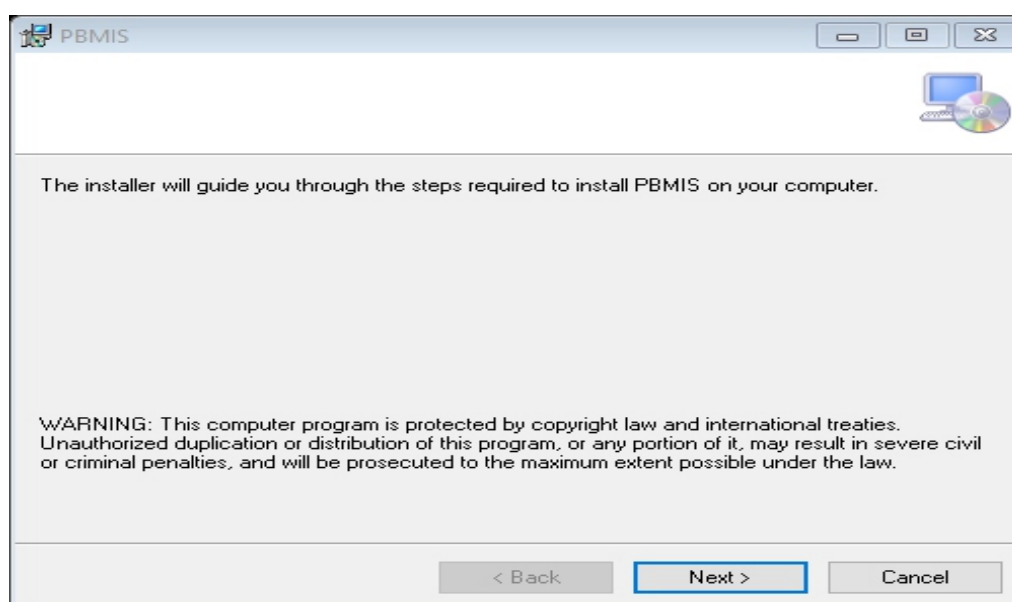
6. Type in the password as provided by the GHS in the Password text box.

7. Check "Remember password"

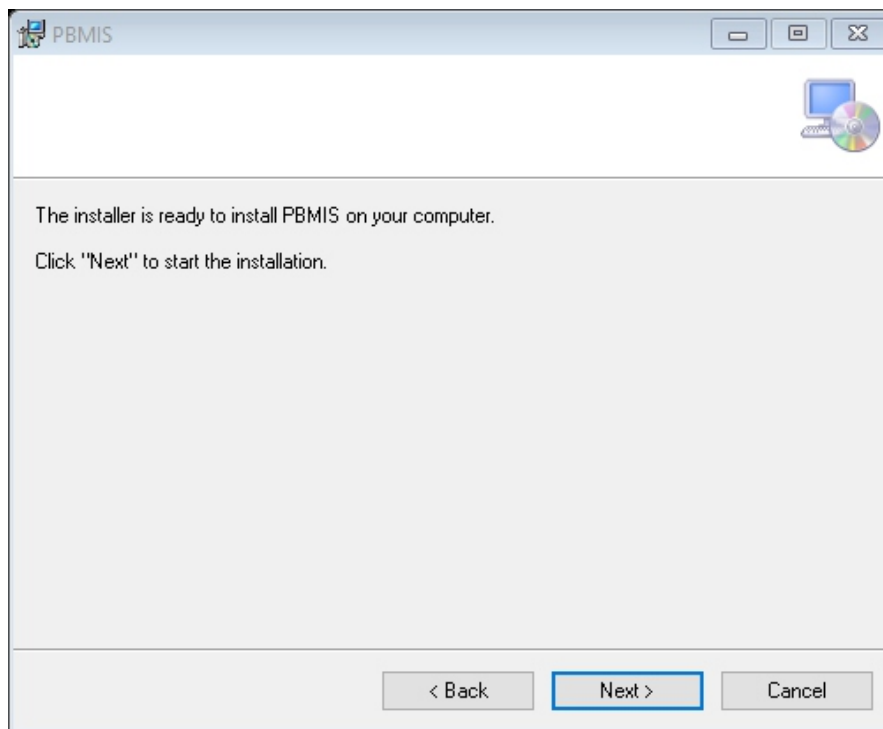
8. Click on the connect button to open the SQL Server Management Studio 2017 window.

How to install the PBMIS Application

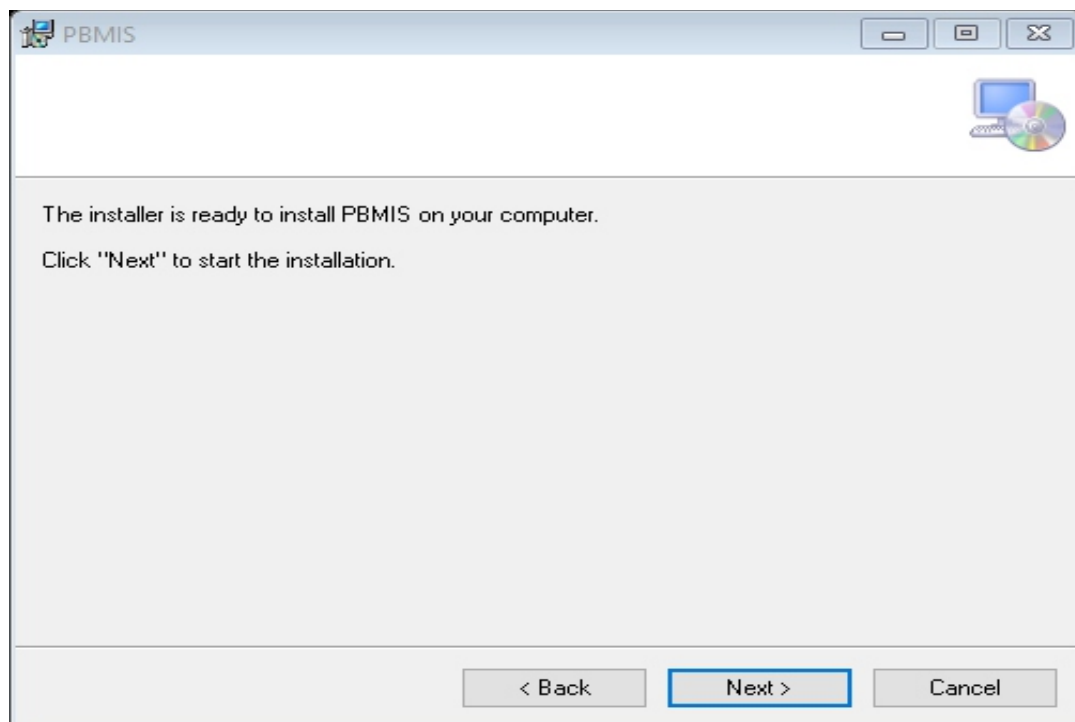
1. Download application using this link – <http://ghsbudget.com/Update/PBMIS.msi> or use the PBMIS Application (GHS Tool – PBMIS) shared.
2. Double click on the downloaded or shared PBMIS setup
3. On the “Welcome to PBMIS Setup Wizard Screen” click on Next

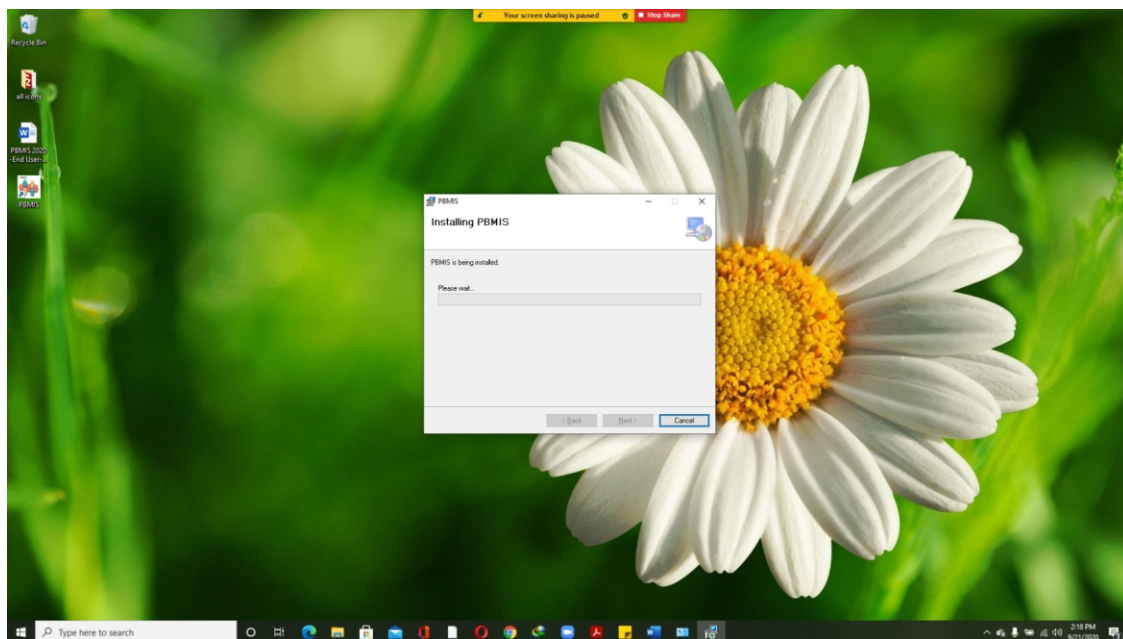


4. On the select installation folder screen maintain the installation path and select “Everyone” for “Install PBMIS for yourself, or for anyone who uses this computer”

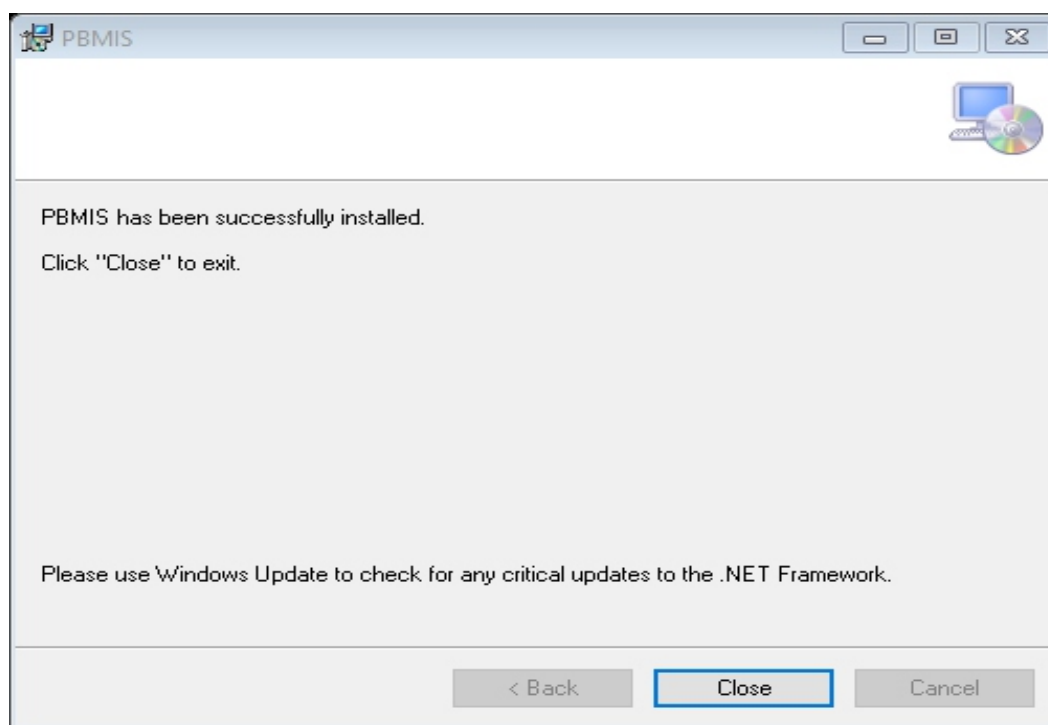


5. Click Next on the “Confirmation Installation” page to start the installation

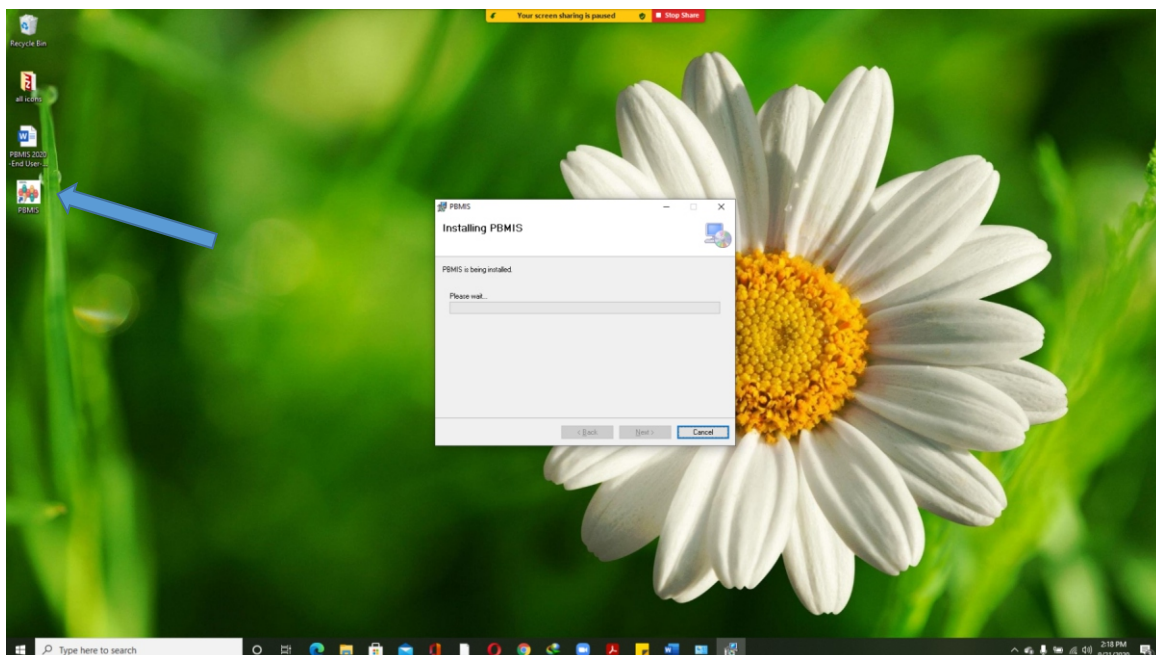




6. Click on close on the “Installation Complete” window to finish the installation.



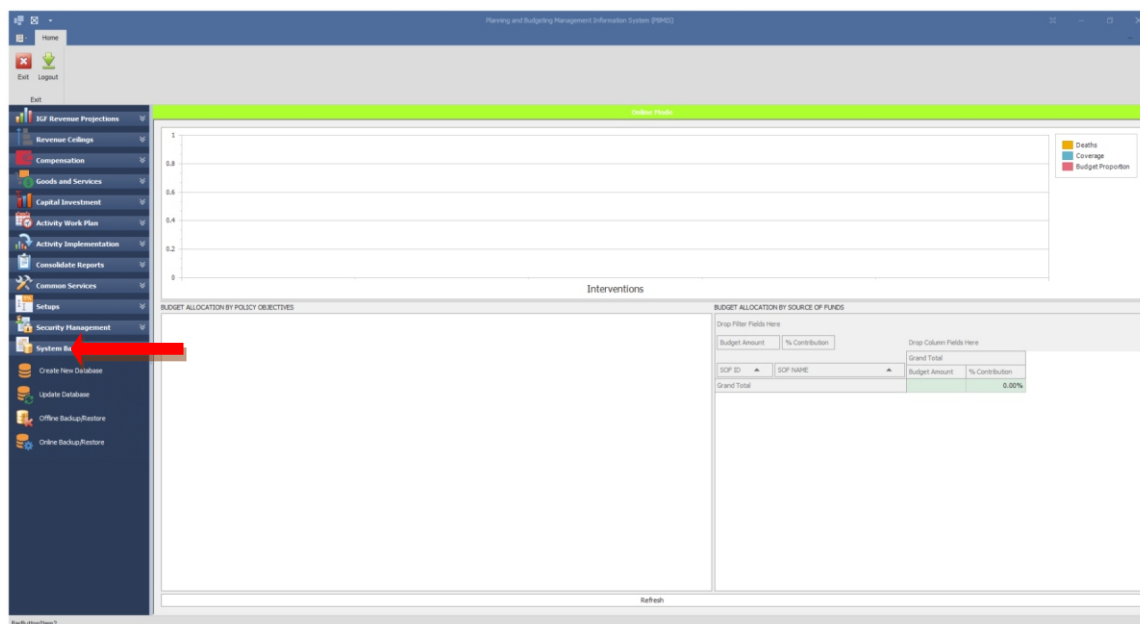
7. The application will be displayed on your desktop as shown below, double click on it to start it:



8. Login online using your credentials (BMC code – User ID)



9. Under System Backup and Restore: Click on “Create New Database” to create the database



10. Under Common services, click on Download Budget Settings to sync budget settings (Refer to Download Budget Settings in End User section of the Manual)
11. Download DHIMS 2 Indicator (Refer to Download DHIMS 2 Indicators in End User section of the Manual)
12. Go to Security Management to sync logins (Refer to Sync Logins in End user section of the Manual)
13. Under Revenue Ceilings, download ceilings (Refer to Download GoG Revenue Ceilings in End User section of the Manual)
14. Log out and login offline (the system is ready for data entry)

Updating PBMIS

OPTION 1

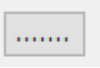
1. The PBMIS will prompt you if there is a new update when you launch it as shown below

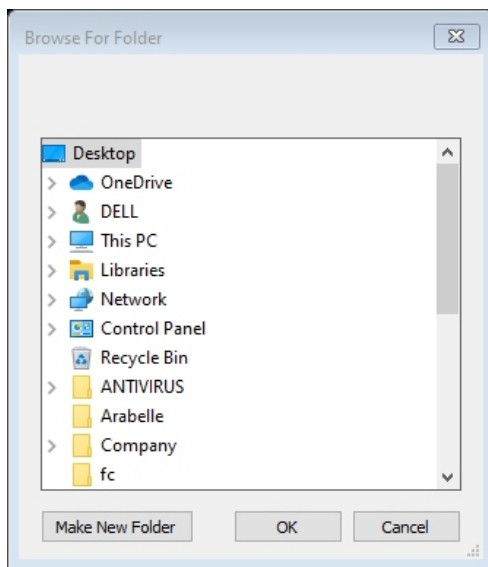


NB: You need to be connected to the internet to be prompted if there is a new update.

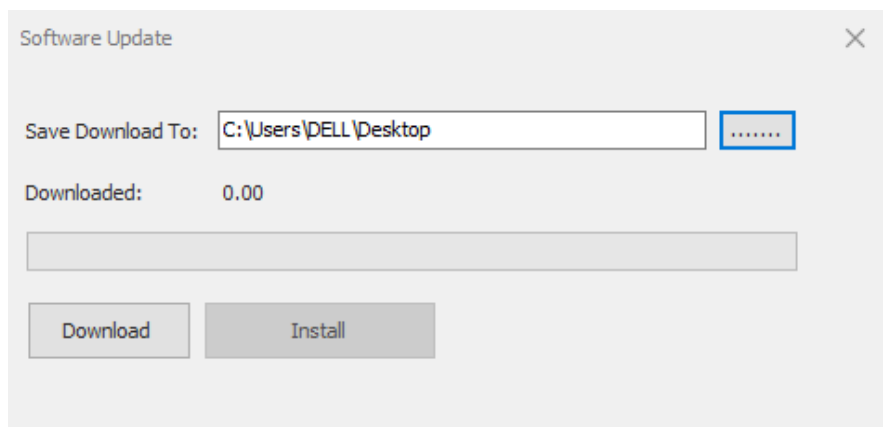
2. Click on ok to open the “Download Form”



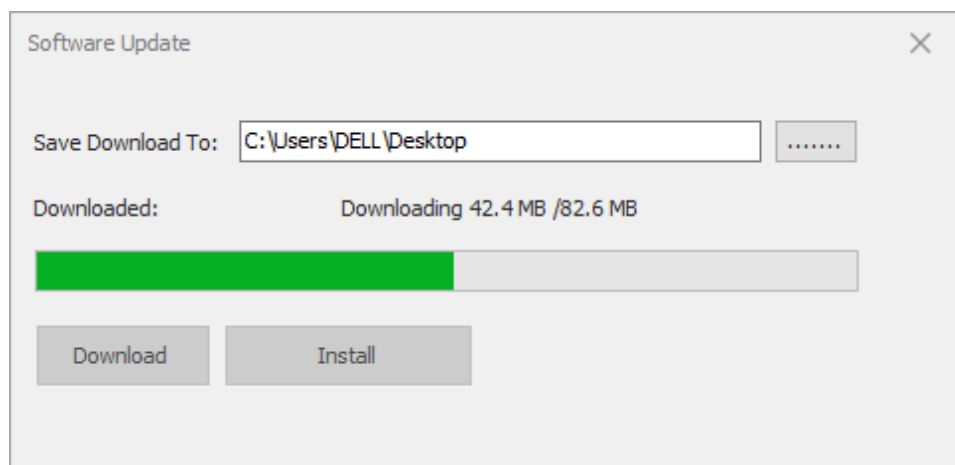
3. Click on the button  to open the Browse for Folder window.



4. Select the folder you want to save the installation to and click on ok. For example, if you want to save it to the Desktop, select Desktop as shown in the image above (Browse for Folder window) and click on ok.
5. You should have the folder appearing in the Software Download form as shown below



6. Click on Download to download the file.



7. Wait and make sure the file is fully downloaded



8. Click on ok to exit the message showing “File was successfully downloaded”
9. Click on Install to install the PBMIS
10. During the installation when asked to exit the PBMIS application, close the Software Update form and then the PBMIS login form and click on continue to continue the installation.

NB: Restart your computer if your computer requests to do so.

11. Launch the PBMIS from your desktop and login online after a successful installation
12. Under system Backup and restore, click on “Update Database” to update the PBMIS database
13. Under Common services , (Refer to End User section)
 - a.click on Download Budget Settings to sync budget settings
 - b.Click on Download DHIMS 2 Indicators (Refer to Download Budget Settings in End User Section of the Manual)
14. Go to Security Management and to sync logins (Refer to Sync Logins in End user Section of the Manual)
15. Under Revenue Ceilings, download ceilings (Refer to Download GOG Revenue Ceilings in End User section of the Manual)
16. Logout of the PBMIS and login offline to start working

OPTION 2

1. When the PBMIS prompts you that there is an update, open your browser and copy link <http://ghsbudget.com/Update/PBMIS.msi> into it.
2. Your browser will prompt you to download the file “PBMIS.msi”. Go ahead and download it to a location of your choice on your computer and close the PBMIS application.
3. After the download, go to the location, double click on PBMIS.msi to install the PBMIS application.
4. Launch the PBMIS from your desktop and login online after a successful installation
5. Under System backup and restore, click on “Update Database” to update the PBMIS database.
6. Under Common services,
 - a. click on Download Budget Settings to sync budget settings
 - b. Click on Download DHIMS2 Indicator (Refer to Download Budget Settings in End User Section of the Manual) to sync DHIMS 2 indicators.
7. Go to Security Management to sync logins (Refer to Sync Logins in End user section of the manual)
8. Under Revenue Ceilings, download ceilings (Refer to Download GOG Revenue Ceilings in End User section of the Manual).
9. Logout of the PBMIS and login offline to start working.

OPTION 3

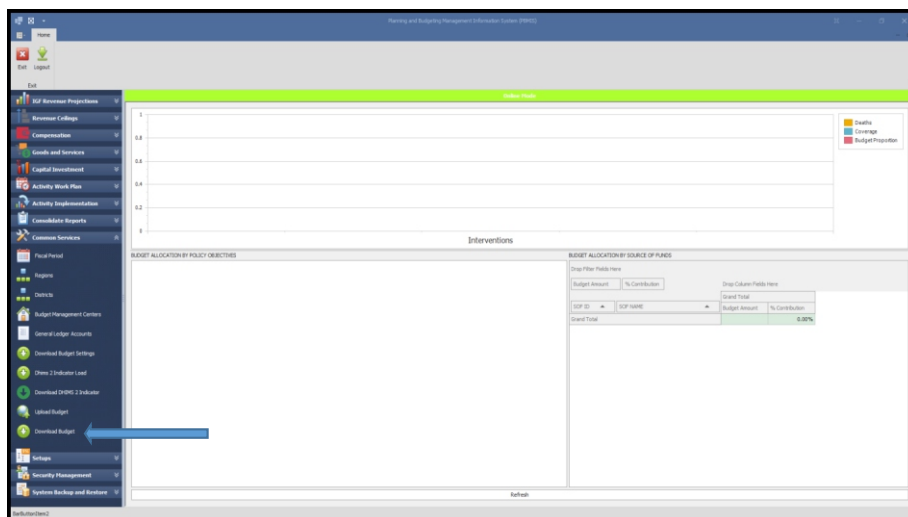
1. When the PBMIS prompts you that there is an update, open your browser and copy link <http://ghsbudget.com/Update/PBMIS.msi> into it.
2. Your browser will prompt you to download the file “PBMIS.msi”. Go ahead and download it to a location of your choice on your computer and close the PBMIS application.
3. After the download go to the location, double click on PBMIS.msi to install the PBMIS application.
4. Launch the PBMIS from your desktop and login online after a successful installation
5. Under Common Services, click on upload Budget to sync your Budget.

NOTE

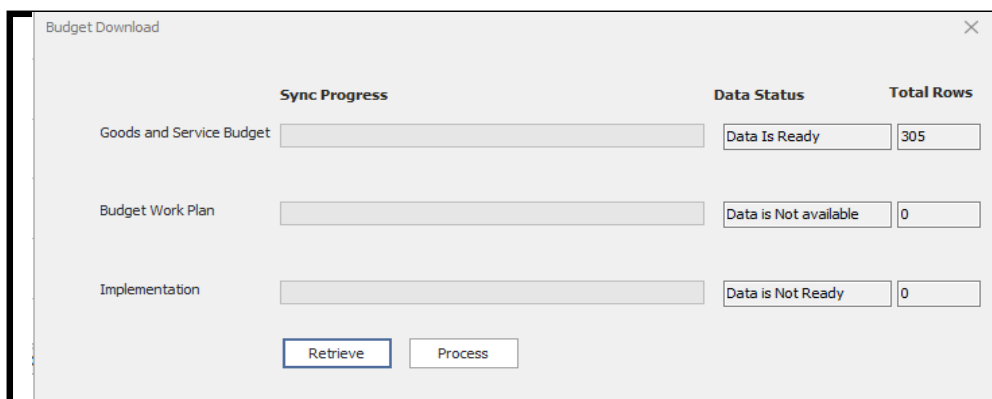
This step is very important. Ensure that, the syncing is successful before proceeding to the next step.

6. Under System Backup and Restore, click on “Create New Database”
7. Under Common services (Refer to End user section of the manual),
 - a.click on Download Budget Settings to sync budget settings

- b. click on Download DHIMS 2 indicators (Refer to Download Budget Settings in End User section of the Manual)
8. Download DHIMS II Indicator (Refer to Download DHIMS 2 Indicators in End User section of the Manual)
9. Go to Security Management to sync logins (Refer to Sync Logins in End user section of the manual)
10. Under Revenue Ceilings, download ceilings (Refer to Download GOG Revenue Ceilings in End User section of the Manual)
11. Under common services, click on Download Budget.



12. Click on “Retrieve” to retrieve your Budget previously synched



NB: One of the status' at “Data Status” should at least show “Data Is Ready”. If Data Status does not show that Data is ready, then you do not have any Budget to be downloaded.

13. Click on Process to download your Budget
14. Logout of the PBMIS and login offline to start working.

How to set Up PBMIS

Introduction

PBMIS requires certain key parameters to be set up before you can use the application to capture plans and budgets.

Below are the setups that PBMIS allows you to configure before plans and budget can be captured:

- **IGF Revenue Items:** This is used to configure all the Revenue items that users need during IGF Revenue Budget capturing.
- **Policy Objective:** The Policy Objective is used to set up the Health Sector Medium Term Development Plan (HSMTDP) Objectives that a Budget will be aligned to for the MTEF period.
- **Categories:** The Category setup is used to set up the Categories where a Budget Operation belongs to.
- **Operations:** The Budget Operation is used to link activities and budgets to the Broad Operations of Government.
- **Intervention Packages:** The Intervention Package setup is used to define all the proven interventions that address the health sector objectives.
- **GHS Core Interventions:** The GHS Core Interventions is used to set up specific interventions that are linked to the national intervention packages defined in the HSMTDP.
- **Projects:** The Project setup defines all known programmes and projects with identified sources of funding for the budget year.
- **Source of Funds:** The Source of Fund setup is used to set up all sources of funding that will be used during the Budget capturing

Adding an IGF Revenue Item

To setup an IGF Revenue Item, follow the steps below:

1. Login to the PBMIS using the online Platform
2. Under Setups, click to open IGF Revenue Items

IGF Items Setup

Item Number:

IGF Revenue Type:

Source of Fund:

Enter text to search... Find Clear

Drag a column header here to group by that column

Item Code	IGF Revenue Type	Source of Fund
1113003	Interest	IGF-Services
1415008	Investment Income	IGF-Services
1415011	Other Investment Income	IGF-Services
1415030	Hiring of Conference Hall	IGF-Services
1423005	Registration of Contractors / Suppliers	IGF-Services
1423047	Ambulance Fee	IGF-Services
1423049	Anesthetics	IGF-Services
1423071	Blood bank	IGF-Services
1423079	C.T. Scan	IGF-Services
1423085	Car Rentals	IGF-Services
1423088	Cardiology	IGF-Services
1423108	Clinical Treatment	IGF-Services
1423109	Clinical Trial	IGF-Services
1423120	Conference Hall	IGF-Services

Save

3. Enter the Item Number, IGF Revenue Type (Revenue Description) and then select the Source of Fund.
4. Click on Save to add the Revenue Item.

Editing IGF Revenue Items

To edit the IGF Revenue Item(s):

1. Login to the PBMIS using the online Platform.
2. Under Setups, click to open IGF Revenue Items.

IGF Revenue Items

Item Number:

IGF Revenue Type:

Source of Fund:

Enter text to search... Find Clear

Drag a column header here to group by that column

Item Code	IGF Revenue Type	Source of Fund
1113003	Interest	IGF-Services
1415008	Investment Income	IGF-Services
1415011	Other Investment Income	IGF-Services
1415030	Hiring of Conference Hall	IGF-Services
1423005	Registration of Contractors / Suppliers	IGF-Services
1423047	Ambulance Fee	IGF-Services
1423049	Anesthetics	IGF-Services
1423071	Blood bank	IGF-Services
1423079	C.T. Scan	IGF-Services
1423085	Car Rentals	IGF-Services
1423088	Cardiology	IGF-Services
1423108	Clinical Treatment	IGF-Services
1423109	Clinical Trial	IGF-Services
1423120	Conference Hall	IGF-Services

Save

3. Search for the item using the Search Panel.

IGF Items Setup

Item Number:

IGF Revenue Type:

Source of Fund:

Find Clear

Drag a column header here to group by that column

Item Code	IGF Revenue Type	Source of Fund
1423079	C.T. Scan	IGF-Services

Save

4. Select the Item to edit from the list, edit and click on save.

Policy Objectives

Adding a Policy Objective:

1. Login to the PBMIS using the online Platform.
2. Under the Setups, click to open Objective Policies.

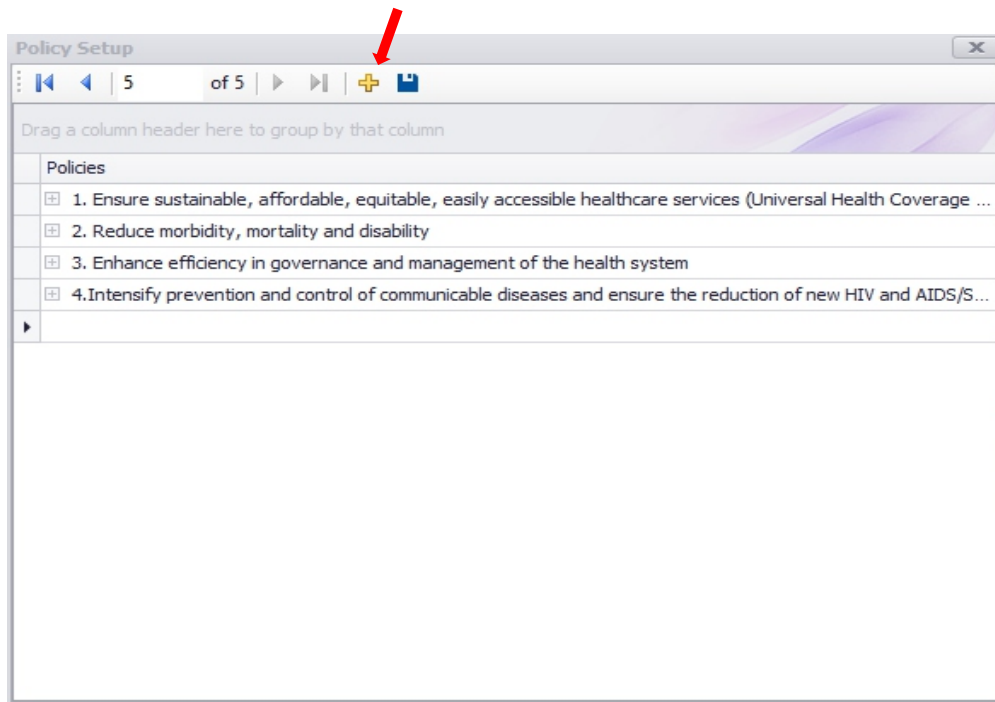
Policy Setup

1 of 4

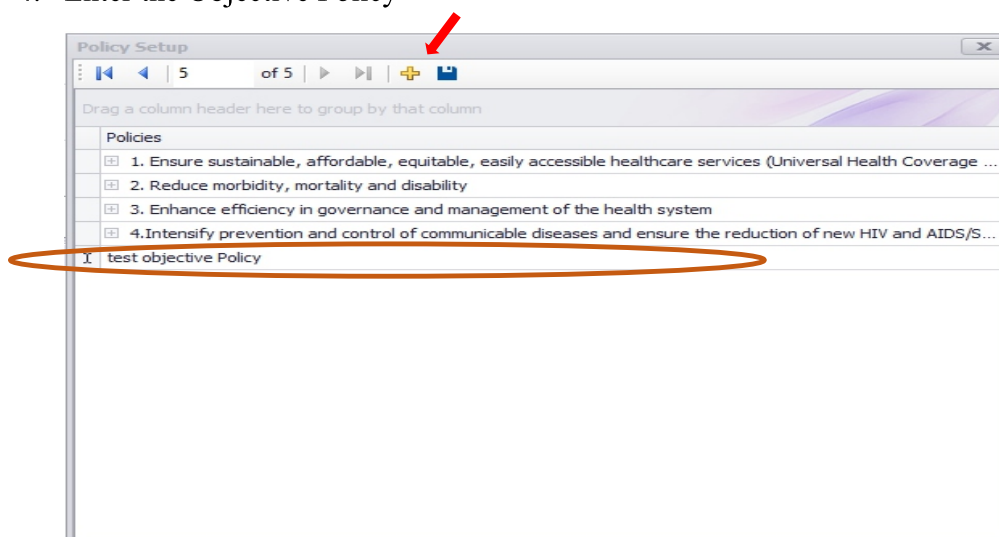
Drag a column header here to group by that column

Policies
1. Ensure sustainable, affordable, equitable, easily accessible healthcare services (Universal Health Coverage ...
2. Reduce morbidity, mortality and disability
3. Enhance efficiency in governance and management of the health system
4. Intensify prevention and control of communicable diseases and ensure the reduction of new HIV and AIDS/S...

3. Click on Add  to add a line in the Grid view.



4. Enter the Objective Policy



5. Click on Save to add the Objective Policy.

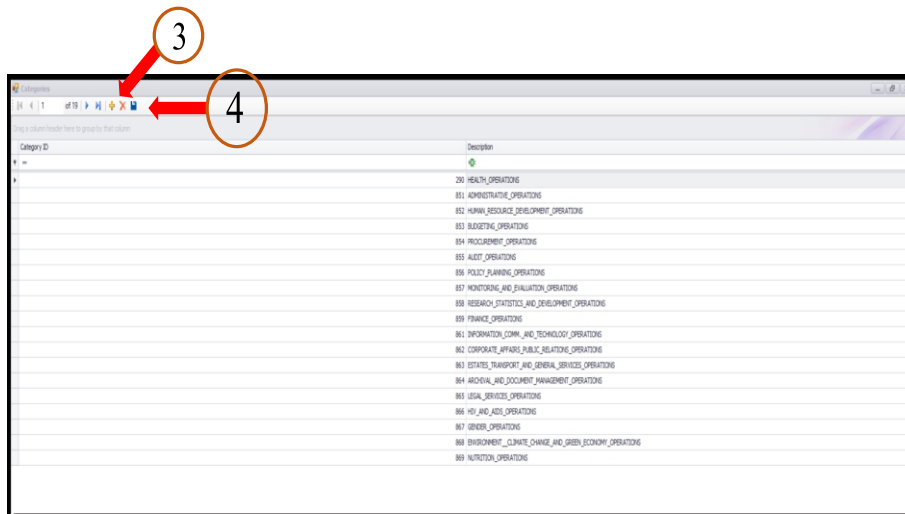
Editing Policy Objective

1. Follow steps 1 to 2 to open the Policy Objective Form
2. Make changes to the Policy Objective and click on the save icon to save it.

Categories

Adding a Category

1. Login to the PBMIS using the online Platform
2. Under Setups, click to open Categories



3. Click on Add  to add a line in the Grid view
4. Enter the Category
5. Click on Save  to add the Category

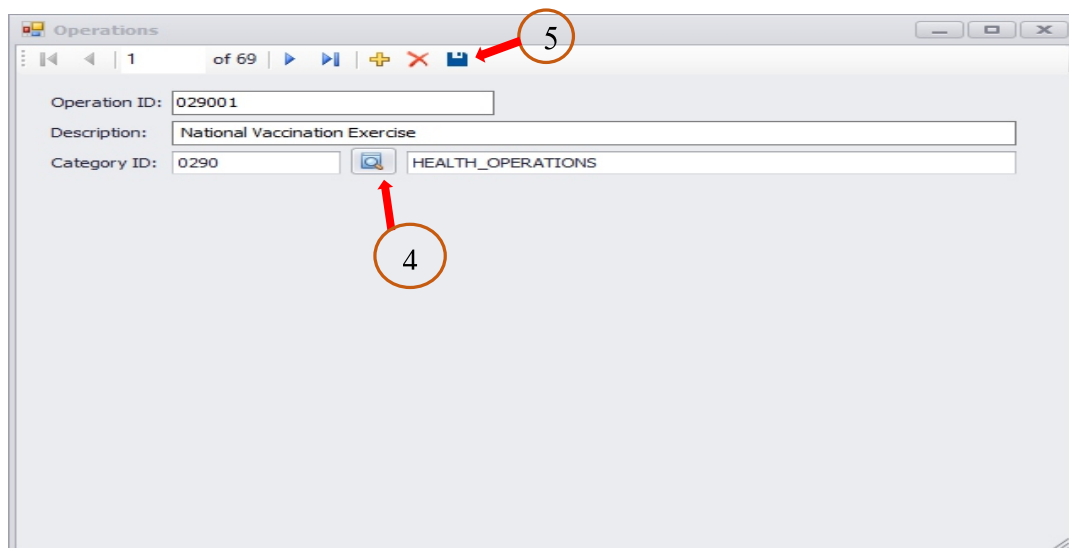
Editing a Category

1. Follow steps 1 to 2 (above) to open the Category Form
2. Make changes to the Category Form and click on the save icon to save it.

Operations

Adding an Operation

1. Login to the PBMIS
2. Under Setups click on Operations to open the Operations Form



3. Enter the Operation ID and the Description
4. Select an associated Category using the find icon 
5. Click on the save icon to save the Operation

Editing an Operation

1. Open the Operations Form
2. Using the Navigation icons go to the Operation to edit
3. Make necessary changes and click on save icon to effect the changes.

Intervention Packages

Adding an Intervention Package

1. Login to the PBMIS and Open the Intervention Package Form
2. Under Setups, click on Operations to open the Operations Form

Intervention Packages

Priority Area ID:

Priority Area Description:

Objective:

Save

Drag a column header here to group by that column

Priority Area ID	Priority Area Description:	Policy Objective
029020010001	Communitybased Health Planning and Service...	1
029020010002	Health Promotions	1
029020020001	Mental Health	2
029020020002	Neonatal Care	2
029020020003	Infant & Child Care	2
029020020004	Adolescent Service	2
029020020005	Maternal Services	2
029020020006	Expanded Programme on Immunisation (EPI)	2
029020020007	Institutional Care	2
029020020008	Public Health and Hospital Emergency Prepare...	2
029020020009	Nutrition Services	2
029020030001	Health Information Management	3
029020030002	Public Financial Management Systems	3
029020030003	Governance	3

3. Enter the Priority Area ID (Intervention Package ID), Priority Area Description (Intervention Package Description) and then select the Objective
4. Click on Save button to add the Intervention Package.

Editing an Intervention Package

1. Login to the PBMIS and Open the Intervention Package Form
2. Under Setups click on Intervention Package to open the Intervention Package Form
3. From the Table, select the Priority Area (Intervention Package) to edit.

Intervention Packages

Priority Area ID: 029020020004

Priority Area Description: Adolescent Service

Objective: 2. Reduce morbidity, mortality and disability

Save

Drag a column header here to group by that column

Priority Area ID	Priority Area Description:	Policy Objective
029020010001	Communitybased Health Planning and Service...	1
029020010002	Health Promotions	1
029020020001	Mental Health	2
029020020002	Neonatal Care	2
029020020003	Infant & Child Care	2
029020020004	Adolescent Service	2
029020020005	Maternal Services	2
029020020006	Expanded Programme on Immunisation (EPI)	2
029020020007	Institutional Care	2
029020020008	Public Health and Hospital Emergency Prepare...	2
029020020009	Nutrition Services	2
029020030001	Health Information Management	3
029020030002	Public Financial Management Systems	3
029020030003	Governance	3

4. The detail appears in the Textboxes as seen in the image above
5. Do the necessary changes

- Click on Save button to add the Intervention Package.

GHS Core Interventions

Adding an Intervention Package

- Login to the PBMIS and Open the Intervention Package Form
- Under Setups click on GHS Core Interventions to open the GHS Core Interventions Form

Core Intervention ID	Core Intervention Description	Priority Area ID	Inactive
0290200100010001	Capacity building for CHPS	029020010001	☐
0290200100010002	Making CHPS Zones functional	029020010001	☐
0290200100010003	Service delivery logistics, equipmen...	029020010001	☐
0290200100010004	Community ownership/empowerment	029020010001	☐
0290200100010005	Improve multi sectoral partnership, ...	029020010001	☐
0290200100010006	Integrated outreach	029020010001	☐
0290200100010007	Supportive supervision	029020010001	☐
0290200100020001	Community entry, engagement, mo...	029020010002	☐
0290200100020002	Social and Behavior Change Commu...	029020010002	☐
0290200100020003	Health Day celebrations	029020010002	☐
0290200200010001	Case Detection	029020020001	☐
0290200200010002	Treatment and Counselling	029020020001	☐
0290200200010003	Community management (including ...	029020020001	☐

- Enter the Core Intervention ID, Core Intervention Description and then select the Priority Area ID (Intervention Package ID)
- Click on Save button to add the Intervention Package.

Editing a GHS Core Intervention

- Login to the PBMIS and Open the Intervention Package Form
- Under Setups click on GHS Core Intervention to open the GHS Core Intervention Form
- From the Table, select the GHS Core Intervention to edit.

Core Intervention ID: 0290200100010007

Core Intervention Description: Supportive supervision

Priority Area ID: 029020010001 Communitybased Health Planning and Services (CHPS)

Status: ☐ Inactive

Save

Core Intervention ID	Core Intervention Description	Priority Area ID	Inactive
0290200100010001	Capacity building for CHPS	029020010001	☐
0290200100010002	Making CHPS Zones functional	029020010001	☐
0290200100010003	Service delivery logistics, equipment...	029020010001	☐
0290200100010004	Community ownership/empowerment	029020010001	☐
0290200100010005	Improve multi sectoral partnership	029020010001	☐
0290200100010006	Integrated outreach	029020010001	☐
0290200100010007	Supportive supervision	029020010001	☐
0290200100020001	Community entry, engagement, mo...	029020010002	☐
0290200100020002	Social and Behavior Change Commu...	029020010002	☐
0290200100020003	Health Day celebrations	029020010002	☐
0290200200010001	Case Detection	029020020001	☐
0290200200010002	Treatment and Counselling	029020020001	☐
0290200200010003	Community management (including ...	029020020001	☐

4. The detail appears in the Text boxes as seen in the image above
5. Do the necessary changes
6. Click on Save button to add the GHS Core Interventions.

Projects

Adding a project

1. Click on Projects under setups to open the Project Form

Project ID:

Project Title:

Status: ☒ Active

Save

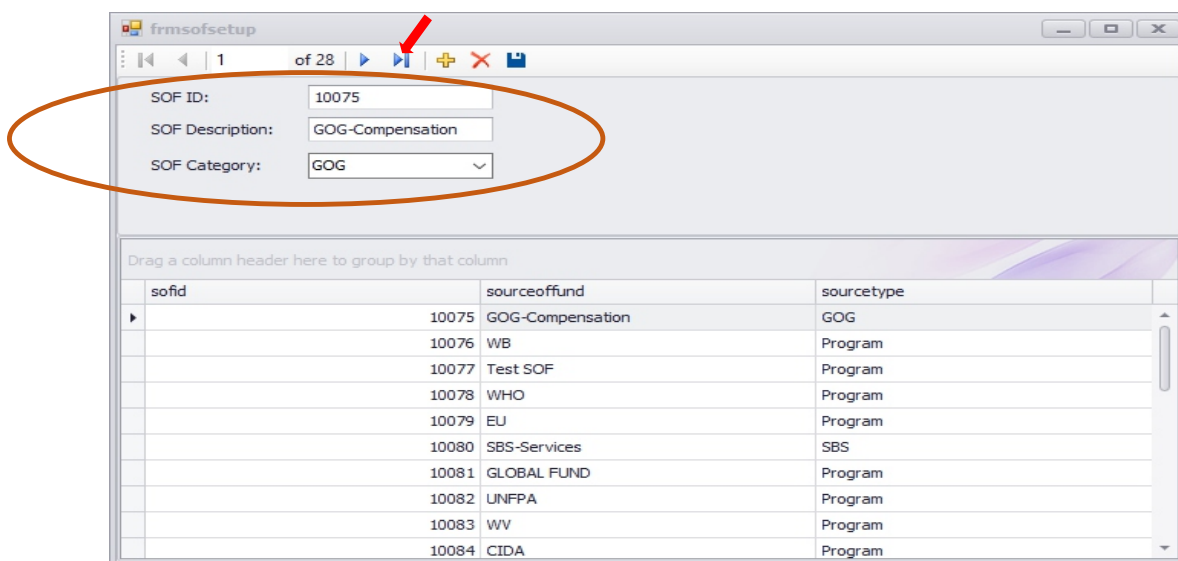
Project ID	Project Title	Inactive
All	All	☒
P0001	CHPS +	☒
P0002	UNFPA	☒
P0003	GAVI ISS	☒
P0004	Himalayan Cataract Project	☒
P0005	Global Fund	☒
P0006	MCHNP	☒
P0007	V-SCAN	☒
P0008	KOICA CHPS +	☒
P0009	GAVI HSS	☒
P0010	HIV Testing	☒
P0011	CBPF	☒
P0012	Measure Evaluation	☒
P0013	CHPS +	☒

2. Enter the Project ID and Description
3. Check the Active button to make the Project Active
4. Save the Project.

Source of Funds

Adding a Source of Fund

1. Open the Source of Fund Form



The screenshot shows the 'frmsofsetup' window. At the top, there are navigation buttons and a status bar indicating '1 of 28'. The form fields are circled in orange:

- SOF ID: 10075
- SOF Description: GOG-Compensation
- SOF Category: GOG

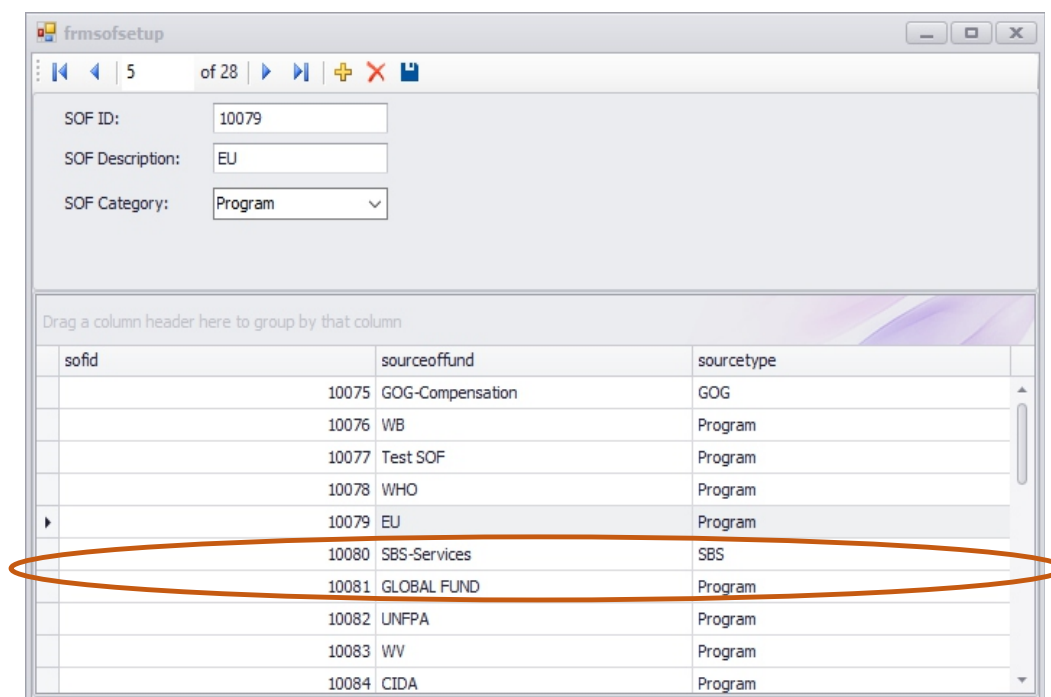
Below the form fields is a table with the following columns: sofid, sourceoffund, and sourcetype. The table contains the following data:

sofid	sourceoffund	sourcetype
10075	GOG-Compensation	GOG
10076	WB	Program
10077	Test SOF	Program
10078	WHO	Program
10079	EU	Program
10080	SBS-Services	SBS
10081	GLOBAL FUND	Program
10082	UNFPA	Program
10083	WV	Program
10084	CIDA	Program

2. Click on the Add icon 
3. Enter the Source of Fund Description
4. Click on Save icon 

Editing Source of Fund

1. Open the Source of Fund Form



The screenshot shows the 'frmsofsetup' window. The form fields are:

- SOF ID: 10079
- SOF Description: EU
- SOF Category: Program

Below the form fields is a table with the following columns: sofid, sourceoffund, and sourcetype. The table contains the following data:

sofid	sourceoffund	sourcetype
10075	GOG-Compensation	GOG
10076	WB	Program
10077	Test SOF	Program
10078	WHO	Program
10079	EU	Program
10080	SBS-Services	SBS
10081	GLOBAL FUND	Program
10082	UNFPA	Program
10083	WV	Program
10084	CIDA	Program

The row for SOF ID 10079 (EU) is highlighted in the table, and the entire table area is circled in orange.

2. Select the Source of Fund to edit and make the necessary changes

3. Click on the save icon  to save.

Projects and Source of Funds

Adding/Editing a Project and Source of Funds

1. Open the Project and Source of Fund Form
2. Select the Source of Fund and the Project to align
3. Click on the Save button to save.

Project and Intervention Package

Adding a Project and Intervention Package

1. Open the Project and Intervention Package Form
2. Select the Intervention Package and the Project to align
3. Click on the Save button to save.

COMMON SERVICES

The Common Services sub-menu is used to do setup that are not Annual and also perform actions that need to be undertaken before any Budget Period kick-starts.

The following Sub-Menus are covered under the common services:

1. Fiscal Period- This is used to set up the Budget Year
2. General Ledger Accounts - This is used to Add new GIFMIS Natural Accounts to the . PBMIS
3. Download Budget Settings - Download Budget Settings is used to download the Setups which are configured under the Setup Sub-Menu
4. DHIMS 2 Indicator Load – This is used to load DHIMS 2 Indicator into the PBMIS to assist in the preparation of Facility Budget
5. DHIMS 2 Indicator Download - This is used by BMCs to download their respective District Indicators
6. Upload Budget – This is used to Upload all the Budget Levels into the PBMIS Consolidated Database

Fiscal Periods

Adding a Fiscal Period

1. Click on Fiscal Periods
2. Click on the Add icon 

Fiscal Periods

6 of 6

Budget Year:

State:

Drag a column header here to group by that column

Budget Year	State
2017	Closed
2018	Closed
2019	Closed
2020	Open
2021	Closed

3. Enter the Budget Year and Select the State

Fiscal Periods

6 of 6

Budget Year:

State:

Drag a column header here to group by that column

Budget Year	State
2017	Closed
2018	Closed
2019	Closed
2020	Open
2021	Closed

4. Click on the Save icon  to save

Fiscal Periods

6 of 6

Budget Year:

State:

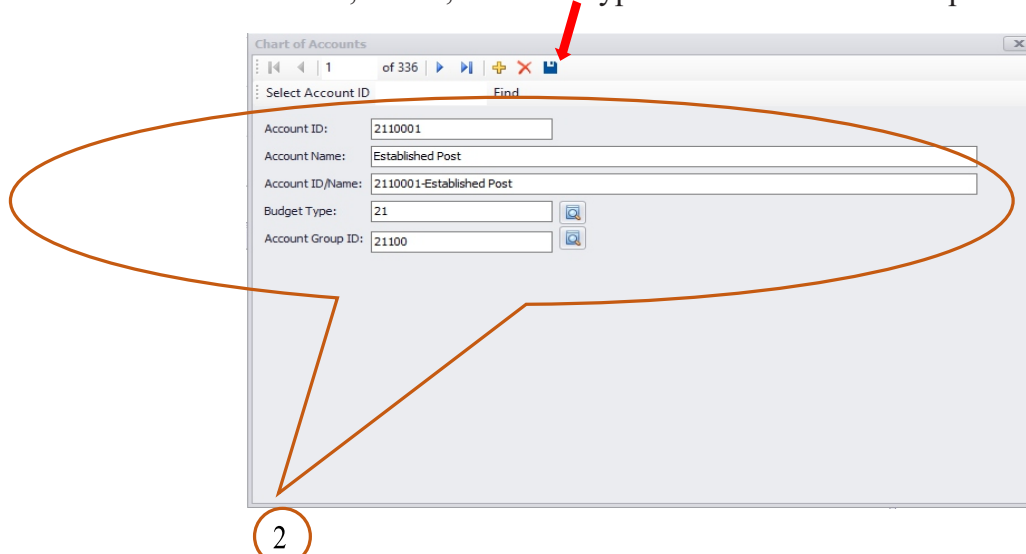
Drag a column header here to group by that column

Budget Year	State
2017	Closed
2018	Closed
2019	Closed
2020	Open
2021	Closed
2022	Opened

General Ledger Accounts

Adding General Ledger Accounts

1. Click on the General Ledger Accounts
2. Click on the Add icon to add a new entry
3. Enter the Account ID, Name, Account Type and the Account Group



4. Click on the Save icon to save

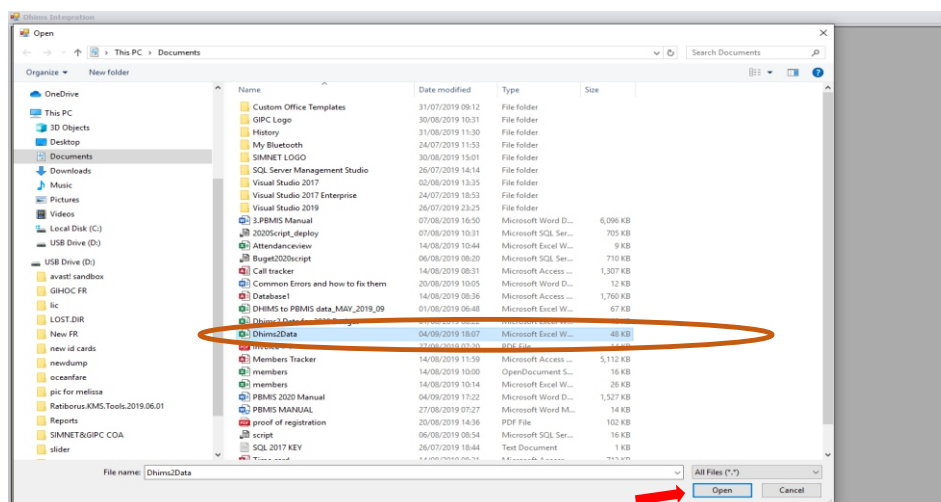
Editing General Ledger Accounts

1. On the General Ledger Account Form, enter the Account ID in the **Select Account ID** text box and click on **Find**
2. Make the necessary changes and click on Save

How to upload DHIMS 2 Indicators per Facility

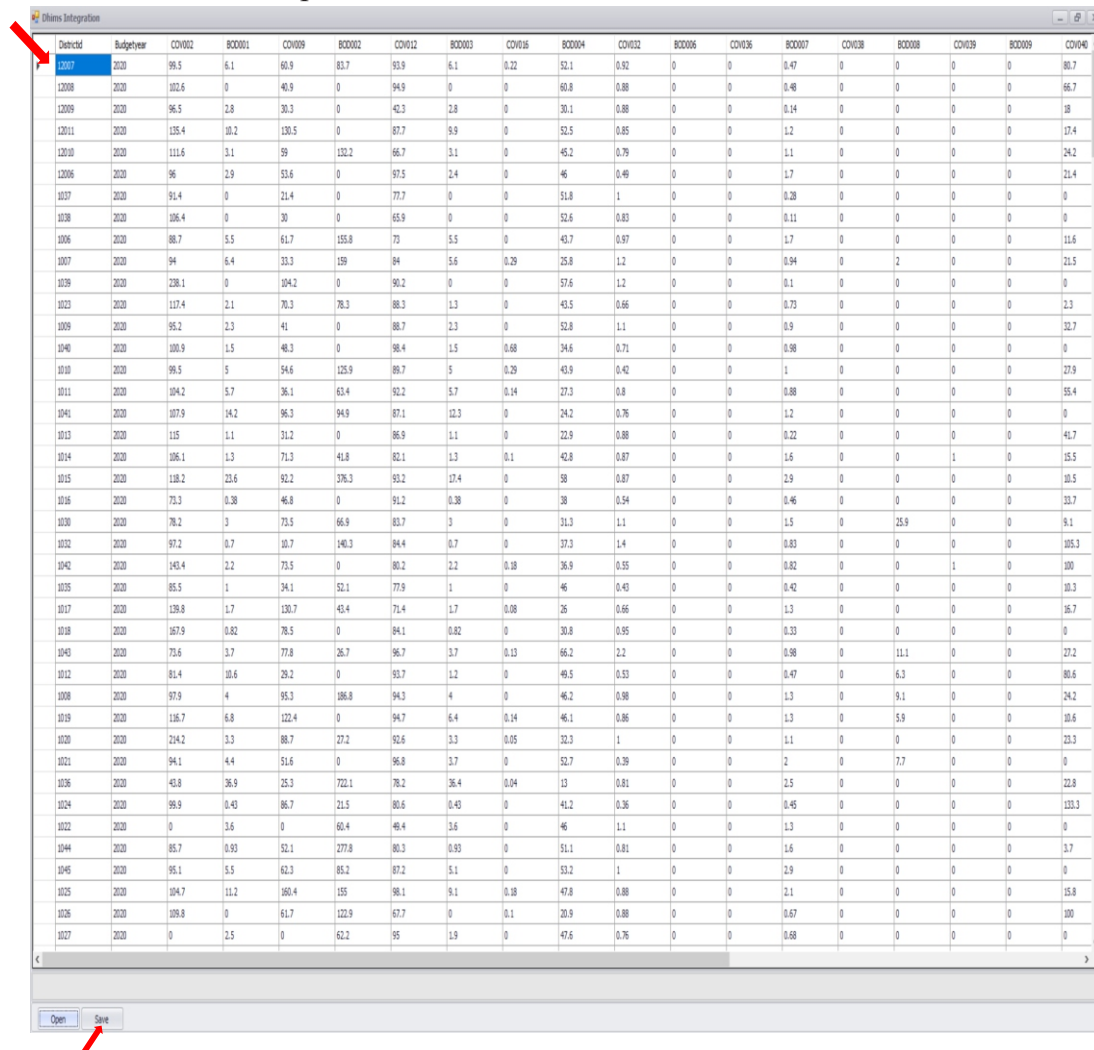
Loading Indicators

1. Click to open the DHIMS 2 Indicator Load Form
2. On the opened Form, click on Open to open a location on your computer where the Indicators are saved.



Note: Indicators will be in excel format exported from DHIMS 2

3. Select the File and open



The screenshot shows a window titled "DHIMS Integration" containing a large table with 20 columns. The columns are labeled: District, Budgetyear, COV002, BCO001, COV009, BCO002, COV012, BCO003, COV016, BCO004, COV022, BCO006, COV036, BCO007, COV038, BCO008, COV039, BCO009, and COV040. The table contains multiple rows of numerical data. At the bottom of the window, there are two buttons: "Open" and "Save". A red arrow points to the "Open" button.

4. Click on Save to Load the Data

Dhims Integration

	DistrictId	BudgetYear	COV002	BCO001	COV009	BCO002	COV012	BCO003	COV016	BCO004	COV032	BCO006	COV036	BCO007	COV038	BCO008	COV039	BCO009	COV040
	12007	2020	99.5	6.1	60.9	83.7	93.9	6.1	0.22	52.1	0.92	0	0	0.47	0	0	0	0	80.7
	12008	2020	102.6	0	40.9	0	94.9	0	0	60.8	0.88	0	0	0.48	0	0	0	0	66.7
	12009	2020	96.5	2.8	30.3	0	42.3	2.8	0	30.1	0.88	0	0	0.14	0	0	0	0	18
	12011	2020	135.4	10.2	130.5	0	87.7	9.9	0	52.5	0.85	0	0	1.2	0	0	0	0	17.4
	12010	2020	111.6	3.1	59	132.2	66.7	3.1	0	45.2	0.79	0	0	1.1	0	0	0	0	24.2
	12006	2020	96	2.9	53.6	0	97.5	2.4	0	46	0.49	0	0	1.7	0	0	0	0	21.4
	1037	2020	91.4	0	21.4	0	77.7	0	0	51.8	1	0	0	0.28	0	0	0	0	0
	1038	2020	106.4	0	30	0	65.9	0	0	52.6	0.83	0	0	0.11	0	0	0	0	0
	1006	2020	88.7	5.5	61.7	155.8	73	5.5	0	43.7	0.97	0	0	1.7	0	0	0	0	11.6
	1007	2020	94	6.4	33.3	159	84	5.6	0.29	25.8	1.2	0	0	0.94	0	2	0	0	21.5
	1039	2020	238.1	0	104.2	0	90.2	0	0	57.6	1.2	0	0	0.1	0	0	0	0	0
	1023	2020	117.4	2.1	70.3	78.3	88.3	1.3	0	43.5	0.66	0	0	0.73	0	0	0	0	2.3
	1009	2020	95.2	2.3	41	0	88.7	2.3	0	52.8	1.1	0	0	0.9	0	0	0	0	32.7
	1040	2020	100.9	1.5	48.3	0	98.4	1.5	0.68	34.6	0.71	0	0	0.98	0	0	0	0	0
	1010	2020	99.5	5	54.6	125.9	89.7	5	0.29	43.9	0.42	0	0	1	0	0	0	0	27.9
	1011	2020	104.2	5.7	36.1	63.4	92.2	5.7	0.14	27.3	0.8	0	0	0.88	0	0	0	0	55.4
	1041	2020	107.9	14.2	96.3	94.9	87.1	12.3	0	24.2	0.76	0	0	1.2	0	0	0	0	0
	1013	2020	115	1.1	31.2	0	86.9	1.1	0	22.9	0.88	0	0	0.22	0	0	0	0	41.7
	1014	2020	106.1	1.3	71.3	41.8	82.1	1.3	0.1	42.8	0.87	0	0	1.6	0	0	1	0	15.5
	1015	2020	118.2	23.6	92.2	376.3	93.2	17.4	0	58	0.87	0	0	2.9	0	0	0	0	10.5
	1016	2020	73.3	0.38	46.8	0	91.2	0.38	0	38	0.54	0	0	0.46	0	0	0	0	33.7
	1030	2020	78.2	3	73.5	66.9	83.7	3	0	31.3	1.1	0	0	1.5	0	25.9	0	0	9.1
	1032	2020	97.2	0.7	10.7	140.3	84.4	0.7	0	37.3	1.4	0	0	0.83	0	0	0	0	105.3
	1042	2020	143.4	2.2	73.5	0	80.2	2.2	0.18	36.9	0.55	0	0	0.82	0	0	1	0	100
	1035	2020	85.5	1	34.1	52.1	77.9	1	0	46	0.43	0	0	0.42	0	0	0	0	10.3
	1017	2020	139.8	1.7	130.7	43.4	71.4	1.7	0.08	26	0.66	0	0	1.3	0	0	0	0	16.7
	1018	2020	167.9	0.82	78.5	0	84.1	0.82	0	30.8	0.95	0	0	0.33	0	0	0	0	0
	1043	2020	73.6	3.7	77.8	26.7	96.7	3.7	0.13	66.2	2.2	0	0	0.98	0	11.1	0	0	27.2
	1012	2020	81.4	10.6	29.2	0	93.7	1.2	0	49.5	0.53	0	0	0.47	0	6.3	0	0	80.6
	1008	2020	97.9	4	95.3	186.8	94.3	4	0	46.2	0.98	0	0	1.3	0	9.1	0	0	24.2
	1019	2020	116.7	6.8	122.4	0	94.7	6.4	0.14	46.1	0.86	0	0	1.3	0	5.9	0	0	10.6
	1020	2020	214.2	3.3	88.7	27.2	92.6	3.3	0.05	32.3	1	0	0	1.1	0	0	0	0	23.3
	1021	2020	94.1	4.4	51.6	0	96.8	3.7	0	52.7	0.39	0	0	2	0	7.7	0	0	0
	1036	2020	43.8	36.9	25.3	722.1	78.2	36.4	0.04	13	0.81	0	0	2.5	0	0	0	0	22.8
	1024	2020	99.9	0.43	86.7	21.5	80.6	0.43	0	41.2	0.36	0	0	0.45	0	0	0	0	133.3
	1022	2020	0	3.6	0	60.4	49.4	3.6	0	46	1.1	0	0	1.3	0	0	0	0	0
	1044	2020	85.7	0.93	52.1	277.8	80.3	0.93	0	51.1	0.81	0	0	1.6	0	0	0	0	3.7
	1045	2020	95.1	5.5	62.3	85.2	87.2	5.1	0	53.2	1	0	0	2.9	0	0	0	0	0
	1025	2020	104.7	11.2	160.4	155	98.1	9.1	0.18	47.8	0.88	0	0	2.1	0	0	0	0	15.8
	1026	2020	109.8	0	61.7	122.9	67.7	0	0.1	20.9	0.88	0	0	0.67	0	0	0	0	100
	1027	2020	0	2.5	0	62.2	95	1.9	0	47.6	0.76	0	0	0.68	0	0	0	0	0

OpenSave

SECURITY MANAGEMENT

1. Expand security management
2. Click on Sync Logins
3. Click on Sync
4. Log out

Note: Repeat this process anytime a new BMC code is being used on the same machine.

BACK UP AND RESTORE

Note: You must first create the backup location or directory i.e. a folder on Drive C and give it a name before backing up.

Pre Database backup and restore

Create a Folder on Drive c: and name it Backup restore

How to take a database backup

1. Open the SQL Server Management Studio
2. In the object explorer expand the database tree by clicking on the + sign
3. Right click on the GHSBudget
4. In the pop up window select Task and then click on Take offline
5. Check the “Drop All Active Connections” and click on the Ok button
6. Right click the GHSBudget database again and select Task and then click on Backup...
7. Ensure that the database name you want to backup reads “GHSBudget”, otherwise click on the dropdown arrow and select the Appropriate database name (GHSBudget)
8. The backup type must be set to “Full”
9. Remove All pre-defined backup destinations by selecting the directory and click on the remove button, otherwise click on the Add button to specify the backup destination
10. Click on the box as highlighted blue with the three dots
11. select the destination folder “Backup Restore”
12. In the file name text field, type the Facility initials, the Current Date and with file extension “.bak” and click the ok button
(e.g. for policy, planning, monitoring and evaluation Division and current date 28th February 2019 will be “PPMED28022019.bak”)
13. Next click ok, ok

How to restore database backup

1. Open the SQL Server Management Studio
2. Right click the GHSBudget database, select Task and click on Take offline

3. Right click the GHS Budget database, select Task, select restore, and then click on Database...
4. From the pop-up window under the source section on the right select device
5. Click on the box as highlighted blue with the three dots
6. From the pop up window, select the folder Backup Restore on the left
7. On the right, select the Database File to be restored and click on Ok
8. Under the destination section on the right, ensure that the database text field reads “GHS Budget”, otherwise click on the drop down arrow by it and select GHS Budget
9. Under Restore Plan, ensure that the restore check box is checked
10. On the left pane, click on options
11. On the right under restore options, click on the check box labelled “overwrite existing Database (WITH REPLACE)” and click on the Ok button to start the restoration process
12. Click on the close button to complete the restoration process

PART B – END USER SECTION

USE OF THE PBMIS

The PBMIS is easy to use, as it does not require much data input and calculations for the preparation of plans and budget and the generation of reports for management decisions.

In using the system for the annual process of planning and budgeting, it is required that BMCs should have gone through their half-year and annual performance review reports and documented their strengths, weaknesses, opportunities, and threats to inform the setting of local priorities and specific activities.

Principally, the routine data from the district health information management system (DHIMS2) and other operational studies are employed to inform evidence-based planning before the output is translated to guide the preparation of MTEF plans and budgets.

The PBMIS has therefore been designed to consider the annual burden of disease and coverage indicators as dashboards from the DHIMS2. This should be used to guide budgetary allocations to address priority interventions. It is further required that output from other planning tools such as the CHPS Costing Tool, the HR Gap Analysis, Transport Planning Tool, and the IGF Revenue Projection Tool, among others, are taken into account as inputs for the preparation of MTEF plans and budgets.

The BMCs' planned activities must be aligned to the sectoral priorities, policies, objectives, strategies, and GHS proven interventions. It is also essential to ensure that resources are efficiently allocated to these planned activities in order to facilitate the achievement of the HSMTDP objectives.

The BMCs are also required to capture all activities with their plans and budgets as well as sources of funding into the system. This will enhance the harmonization of activities and eliminate duplications to achieve efficiency and effectiveness in resource allocation.

The budget work plan and implementation modules are to be employed to support the assessment of budget as implemented against plans in order to identify variations for management decisions and support.

All mandatory fields in the PBMIS are required to be filled or inputted before the system allows for subsequent action by the user.

Users should ensure that only validated and authorized data from their BMCs are captured into the PBMIS.

The PBMIS should be used by all authorized managers of BMCs at the various levels to facilitate the development and management of their annual plans and budgets. Access to certain contents and features will depend on the users' defined security settings. It is required that users adhere to their authorization levels as defined in the system and their BMCs to enhance the use of the PBMIS for management decision making.

The output reports from the PBMIS can be used to engage with Development Partners and other stakeholders in advocating for resources to support the implementation of the annual plans and budgets. It is also to ensure efficient resource mapping and harmonization of resource allocation and activities during implementation to achieve efficiency gains. Other uses of the PBMIS reports for budget decision making and strategic planning include:

- a) IGF Revenue Projection analysis
 - IGF Revenue Projection by category
- b) HR plans and budget analysis
 - Budget analysis by Retiring Staff
 - Budget Analysis by Staff Grade
 - Budget Analysis by Contract Staff
 - Derivation of Recruitment and Promotion Budget
 - Number of Years Spent on Grade
- c) Goods and Services plans and budget analysis
 - Budget Allocation by Expense Account
 - Budget Allocation by Objectives
 - Budget Allocation by Expense Accounts, Interventions, and Source of Funds
 - Budget Allocation by Source of Funds
 - Budget Allocation by Intervention Packages
 - Budget Allocation by Specific Activity and Source of Funds
- d) Capital investment plans and budget analysis
 - Database of the status of annual capital investment projects
 - Budget Allocation by Project Type

HOW TO USE PBMIS

1. The Planning and Budget Management Information System (PBMIS) application could be accessed using any of the following options:
 - a. Locate the Planning and Budget Management Information System Icon on the desktop or
 - b. Use the start menu and point to all programs to locate the Planning and Budget Management Information System (in Policy Planning Monitoring and Evaluation Unit folder) or
 - c. Use the search option and type Planning and Budget Management Information System.



Figure 1: Location of PBMIS Application

2. Double click on the PBMIS Icon to launch the application. A Login window is displayed in Figure 2: Login Screen

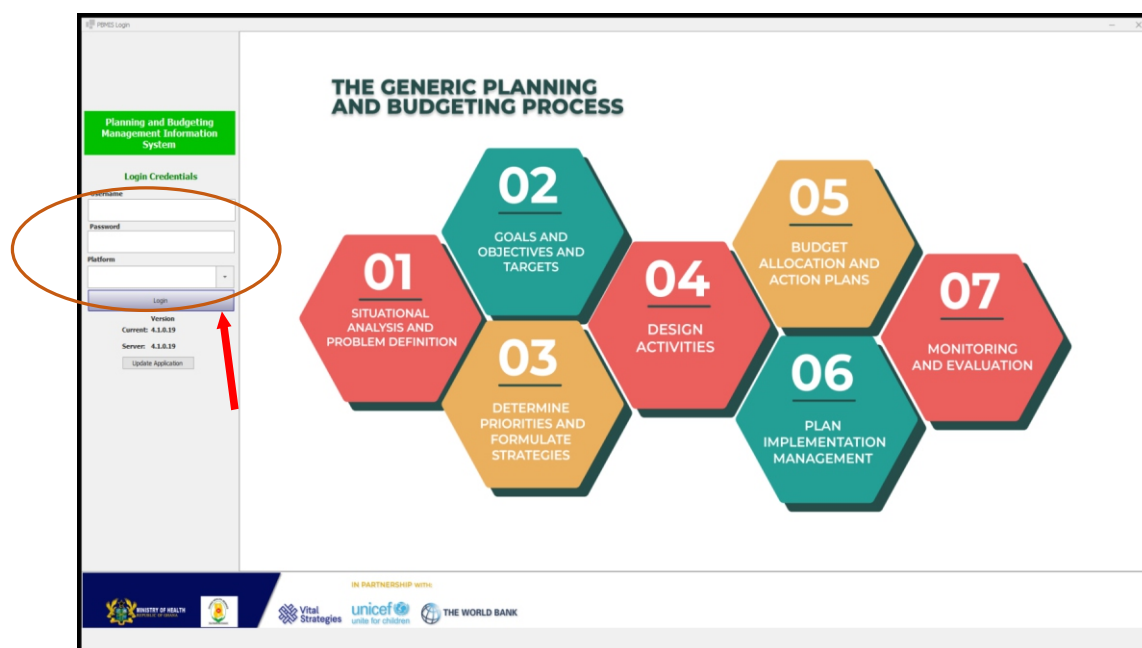


Figure 2: PBMIS Login Window

3. To successfully log into the application, you should have the right credentials:
 - a. Enter your **username**
 - b. Enter your **password**.
 - c. In the platform selection option, select **Online if logging in for the first time**
 - d. Click on the login button.

Note:

Your username and password will be provided by the Ghana Health Service PBMIS Support Team.

Main window

A successful Login will display your BMC or facility name. The PBMIS main window is displayed in Figure 3. It has been designed to facilitate access to all the tools and features.

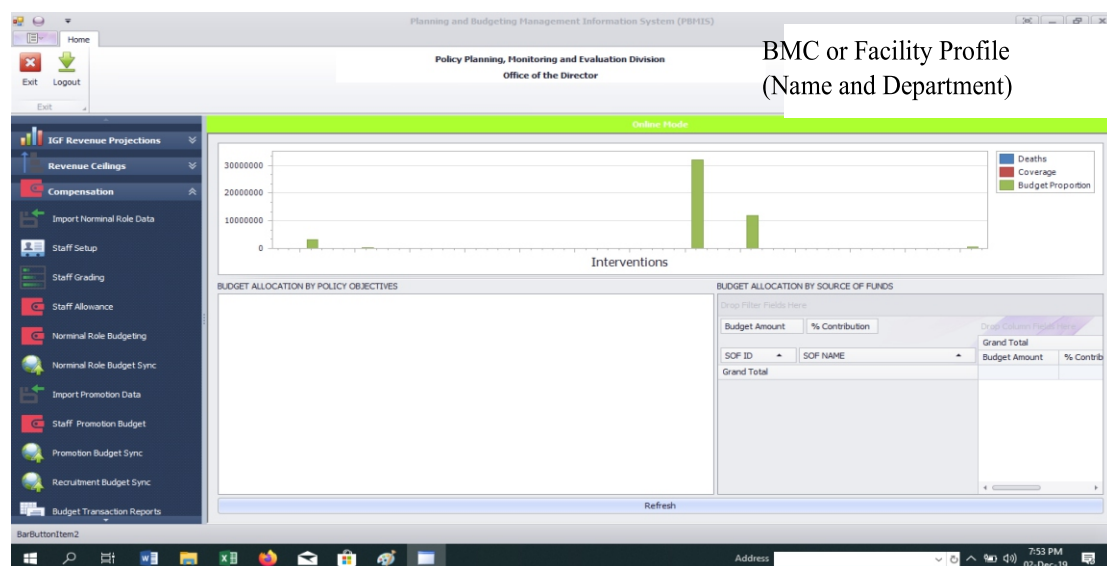


Figure 3: PBMIS Main Window

How to Synchronize Settings and logins

PBMIS can be accessed both offline and online. However, all PBMIS settings are done on the online platform. You are required to sync settings in the following scenarios:

1. After installing PBMIS for the first time
2. Any time you run the PBMIS script
3. When you request for a password reset from the PBMIS Technical team
4. At the start of every Budget year
5. After every upgrade or update of the application (when information is disseminated that extra settings have been added to the PBMIS).

The following steps will guide you to sync settings and logins for the first time:

Common Services

The common services download the sector objectives, GHS core interventions, intervention packages, and the facility performance indicators for the prior year.

1. Expand the **Common Services** menu

2. Click on download budget settings
3. From the pop-up menu click on Sync
4. Click on Download DHIMS 2 Indicator
5. From the pop-up window click on Retrieve and then click on the download button

Security management

1. Expand the **Security Management** menu and click on Sync Logins
2. From the pop-up window **click** on the **Sync button** to sync your login details offline.

Revenue Ceilings

1. Click on download Ceilings
2. From the pop-up window, click on Retrieve, then click on the Download button
3. Logout from the online platform

How to run the Application offline to capture data and run reports

1. Enter your **username**
2. Enter your **password**.
3. In the platform selection option, select **Offline**.
4. Click on the login button.

A successful offline login is displayed in Figure 4.

Navigation Menu

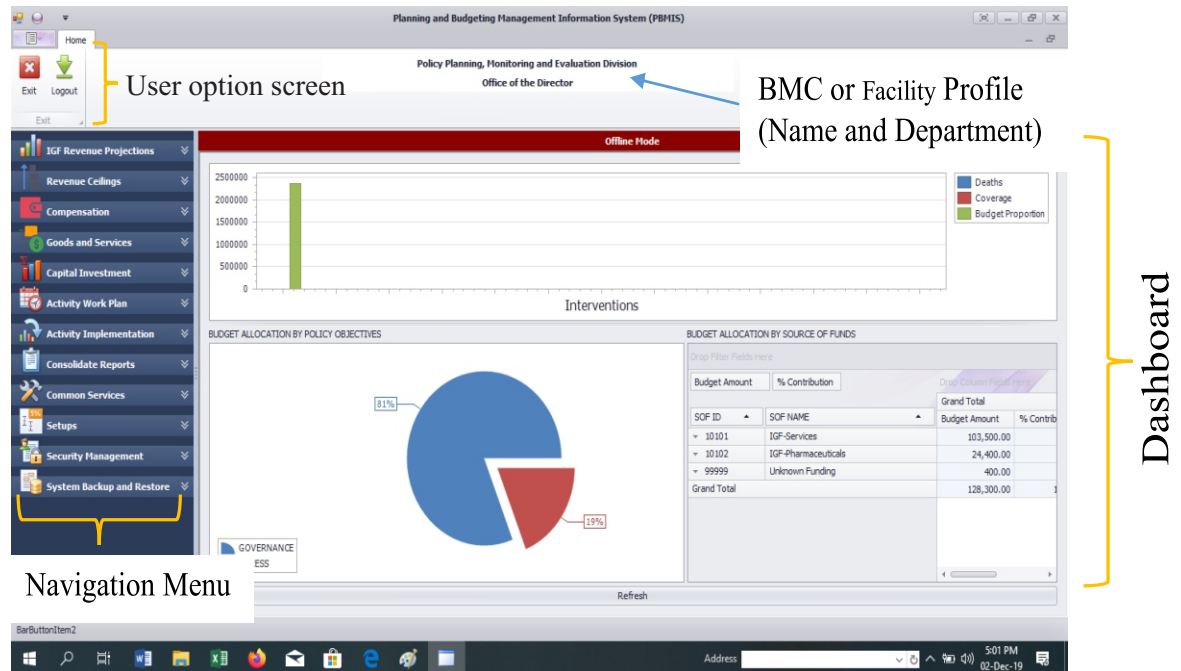
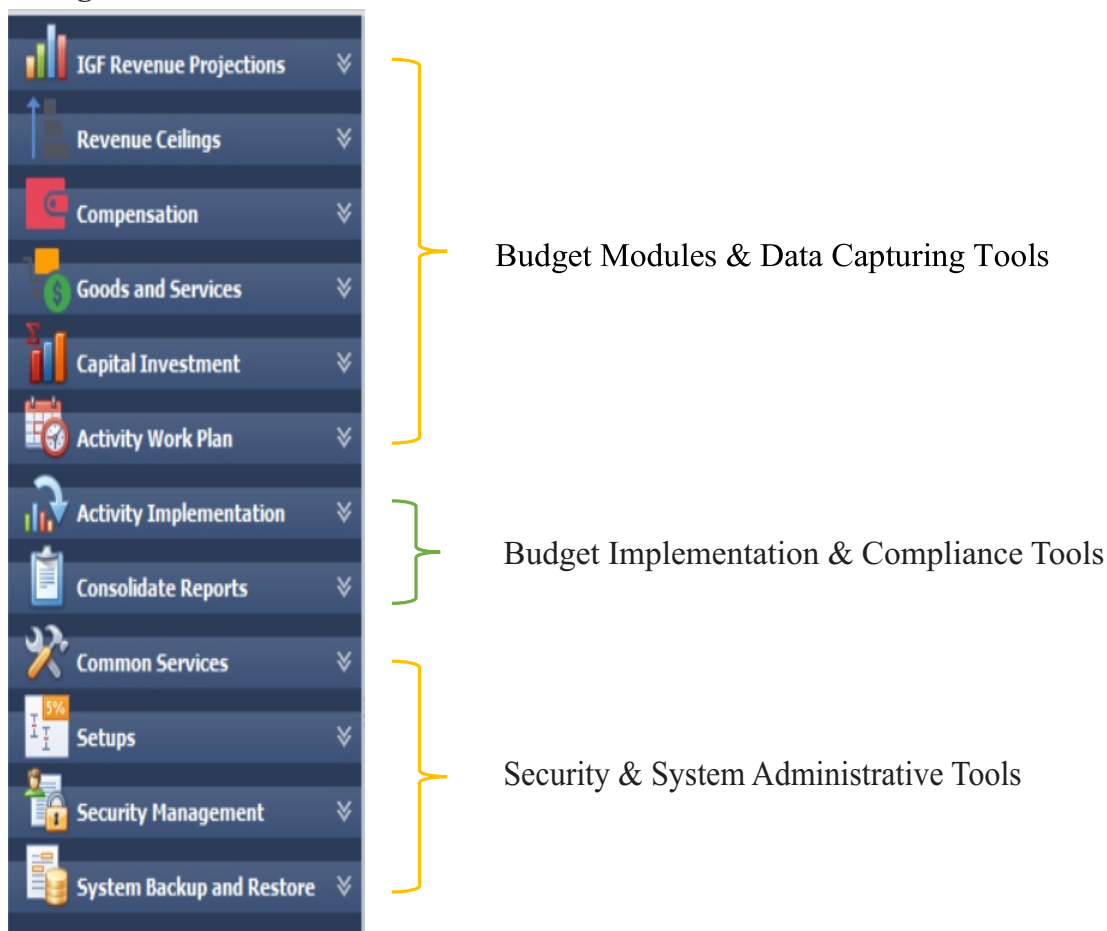


Figure 4

Navigation Menu



Use the Navigation Menu to navigate the PBMIS by clicking on the expand symbol 

User Option Screen (Fig. 4)

Exit – Click on the Exit button to close PBMIS

Logout - Click on the Logout button to return to the Login Screen

IGF REVENUE PROJECTION

Introduction

The IGF Revenue Projection sub-module allows users to input BMC IGF projected revenue which serves as the IGF expenditure ceiling.

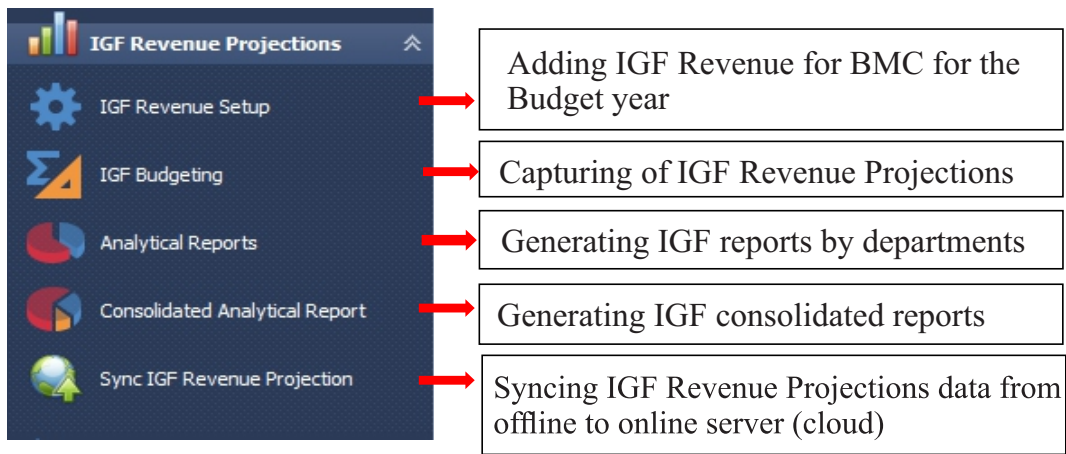


Figure 5: IGF Revenue Projection Sub-Module

How to Add IGF Revenue Budget

1. Click on IGF Revenue Setup to open the IGF Revenue Setup form as shown in the figure below:

The screenshot shows the 'IGF Revenue Setup' form. At the top, there are several input fields: 'Bmc Code' (0290201008), 'Bmc Name' (Policy Planning, Monitoring and Evaluation Division), 'Login User' (0290201008), and 'Department' (0290201008 Office of the Director). Below these are 'Budget Year' (2021), 'Current Year' (2020), and 'Last Year' (2019). There is also an 'IGF Revenue Type' field with a search icon. Below the form fields is a table with two columns: 'IGF Revenue Code' and 'IGF Revenue Type'. The table is currently empty. At the bottom of the form are 'Add' and 'Remove' buttons.

2. Click on the find icon  beside the IGF Revenue type to search for the Revenue type to add.

3. Select the Revenue item to add and click on the Select button

Find IGF Revenue Items

Drag a column header here to group by that column

Enter text to search...

Item Code	IGF Revenue Type	Source of Fund
1111204	Payment for supply of goods or use of property or	IGF-Services
1112012	Registration Fees	IGF-Services
1112208	Interest On Account	IGF-Services
1113003	Interest	IGF-Services
1141106	Vehicles, Sales and Repairs	IGF-Services
114110601	Vehicle Repairs	IGF-Services
114110602	Routine Servicing	IGF-Services
114110603	Air Condition Repairs	IGF-Services
114110604	Vulcanizing	IGF-Services
114110605	Vehicle Electronic Diagnosis	IGF-Services
114110606	Body Works and Spraying	IGF-Services
114110607	Auto Electrical Works	IGF-Services
114110608	Fuel System Purging	IGF-Services
114110609	Pump Servicing	IGF-Services
114110610	Battery Charging	IGF-Services
114110611	Car Washing	IGF-Services
114110612	Fleet Management Consultancy	IGF-Services
114110613	Solar Power Installation	IGF-Services
114110614	Sales of Power Inverters	IGF-Services

Select

4. Click on the Add Button to add the Revenue item

IGF Revenue Setup

Bmc Code: 0290201008

Bmc Name: Policy Planning, Monitoring and Evaluation Division

Login User: 0290201008

Department: 0290201008 Office of the Director

Budget Year: 2021 Current Year: 2020 Last Year: 2019

IGF Revenue Type: 

Drag a column header here to group by that column

IGF Revenue Code	IGF Revenue Type
1111204	Payment for supply of goods or use of property or

Add Remove

- Click on IGF Budgeting on the Sub-menu to open IGF Budget Form as shown below

IGF Budget

Bmc Code: 0290201008
 Bmc Name: Policy Planning, Monitoring and Evaluation Division
 Login User: 0290201008
 Department: 0290201008 Office of the Director
 Budget Year: 2021
 IGF Revenue Type:
 Source of Fund: Total Budget: 0.00

Non-Insured

Prior Year Average: 0
 Rate of Projection (%): 0
 Projected Monthly Average: 0.00
 Approved Tariff:
 Annual IGF Budget: 0.00

Insured (NHIS)

Prior Year Average: 0
 Rate of Projection (%): 0
 Projected Monthly Average: 0.00
 Approved Tariff:
 Annual IGF Budget: 0.00

Projections

Month	Previous Years	Primary Non-Insured	Primary Insured (NHIS)	Primary Total	Referral Non-Insured	Referral Insured (NHIS)	Referral Total
Total:		0.00	0.00	0.00	0.00	0.00	0.00

Add/Update

- Click on the Finder icon beside IGF Revenue Type to open the IGF Revenue List for your BMC

Find IGF Revenue Items

Drag a column header here to group by that column

Enter text to search...

IGF Revenue Code	IGF Revenue Type	Source of Fund	Insured Price	Non-Insured Price
1111204	Payment for supply of goods or use of prop...	IGF-Services	1.00	1.00

Select

- Select the IGF Revenue to budget for and click on select
- Enter Prior year Actuals for Primary and Referral in the grid view as shown below

IGF Budget

Bmc Code: 0290201008
 Bmc Name: Policy Planning, Monitoring and Evaluation Division
 Login User: 0290201008
 Department: 0290201008 Office of the Director
 Budget Year: 2021
 IGF Revenue Type: 1111204 Payment for supply of goods or use of property or
 Source of Fund: IGF-Services Total Budget: 42,444.00

Non-Insured
 Prior Year Average: 2364
 Rate of Projection (%): 0
 Projected Monthly Average: 2,364.00
 Approved Tariff: 1.00
 Annual IGF Budget: 28,368.00

Insured (NHIS)
 Prior Year Average: 1173
 Rate of Projection (%): 0
 Projected Monthly Average: 1,173.00
 Approved Tariff: 1.00
 Annual IGF Budget: 14,076.00

Projections

Month	Previous Years	Primary Non-Insured	Primary Insured (NHIS)	Primary Total	Referral Non-Insured	Referral Insured (NHIS)	Referral Total
July	2019	200	120	320.00	300	220	520.00
August	2019	1200	100	1,300.00	1300	200	1,500.00
September	2019	890	130	1,020.00	990	230	1,220.00
October	2019	112	80	192.00	223	90	313.00
November	2019	3334	1000	4,334.00	4334	2000	6,334.00
December	2019	1200	900	2,100.00	1300	1000	2,300.00
January	2020	1300	900	2,200.00	1400	1000	2,400.00
February	2020	1299	800	2,099.00	1399	900	2,299.00
March	2020	890	500	1,390.00	990	600	1,590.00
April	2020	889	600	1,489.00	1000	700	1,700.00
May	2020	900	700	1,600.00	1000	800	1,800.00
June	2020	906	200	1,106.00	1009	300	1,309.00
Total:		13,120.00	6,030.00	19,150.00	15,245.00	8,040.00	23,285.00

Add/Update

Rate of Projection

Pricing (NHIS Tariff)

Prior Year Budget Session

- i. IGF generating facilities will capture actual prior-year revenue performance (Prior year July to current year June)
 - ii. The component of Facility IGF Support approved to be retained at the respective levels (DHD, RHD, and Head Office) will be aggregated and divided into 12 equal parts and captured as the prior year data.
9. Enter the Rate of Projection for the Budget Year and Approved Tariffs, both Non-Insured and Insured to be used for the Budget projection as shown below:
- i. IGF generating facilities will key in their rate of projection based on intervention and strategies and approved NHIS tariffs per service item.
 - ii. The rate of projection and approved tariff for IGF Support will be set to a value of one (1) since the prior year amount captured is equal to the actual projection.

10. Click on Add/Update to add or update the IGF Budget

IGF Budget

Bmc Code: 0290201008
 Bmc Name: Policy Planning, Monitoring and Evaluation Division
 Login User: 0290201008
 Department: 0290201008 Office of the Director
 Budget Year: 2021
 IGF Revenue Type: 1111204
 Source of Fund: IGF-Services
 Total Budget: 906,784.20

Non-Insured
 Prior Year Average: 2364
 Rate of Projection (%): 5
 Projected Monthly Average: 2,482.20
 Approved Tariff: 23.00
 Annual IGF Budget: 685,087.20

Insured (NHIS)
 Prior Year Average: 1173
 Rate of Projection (%): 5
 Projected Monthly Average: 1,231.65
 Approved Tariff: 15.00
 Annual IGF Budget: 221,697.00

Projections

Month	Previous Years	Primary Non-Insured	Primary Insured (NHIS)	Primary Total	Referral Non-Insured	Referral Insured (NHIS)	Referral Total
July	2019	200	120	320.00	300	220	520.00
August	2019	1200	100	1,300.00	1300	200	1,500.00
September	2019	890	130	1,020.00	990	230	1,220.00
October	2019	80	80	160.00	223	90	313.00
November	2019	1000	1000	2,000.00	4334	2000	6,334.00
December	2019	900	900	1,800.00	1300	1000	2,300.00
January	2020	900	900	1,800.00	1400	1000	2,400.00
February	2020	800	800	1,600.00	1399	900	2,299.00
March	2020	500	500	1,000.00	990	600	1,590.00
April	2020	600	600	1,200.00	1000	700	1,700.00
May	2020	900	900	1,800.00	1000	800	1,800.00
June	2020	906	200	1,106.00	1009	300	1,309.00
Total:		13,120.00	6,030.00	19,150.00	15,245.00	8,040.00	23,285.00

Dialog Box: GHSBudgetTool
 IGF Revenue Budget added successfully
 OK

Add/Update

11. Repeat steps 2 to 11 for all IGF Revenue Types you are budgeting for.

12. Click on print to preview as displayed in figure 6

GHANA HEALTH SERVICE
 Policy Planning, Monitoring and Evaluation Division
 Office of the Director
 IGF REVENUE PROJECTION REPORT
 2020

Year Health - Our Concern

Category	Revenue Type	Grand Total	OPD/Cash	IPD/Credit	Total	% Cont.
IGF-Pharmaceuticals	Med & Pharm (Anti - Fungal)	45,800.00	67,677,788.00	7,723,588.00	99.79%	
IGF-Services	C.T. Scan	78,000.00	67,000.00	145,000.00	0.21%	
Grand Total		123,800.00	67,744,788.00	7,868,588.00	100.00%	

Approved By

 DIRECTOR-PPMED
 DATE _____

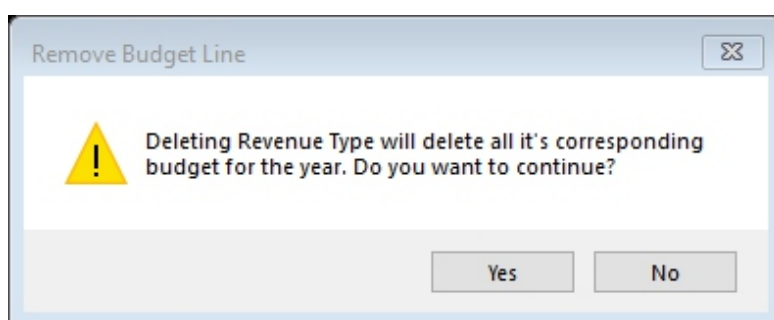
Figure 6: IGF revenue projection report

Editing Revenue Budget

1. On the IGF Budget Form, use the find icon to open the IGF Revenue Item list form
2. Select the IGF Revenue type to edit and click on select to select it
3. On the IGF Budget Form perform the necessary changes and click on the Add/Update button.
4. You should receive the message “IGF Revenue Budget Details Updated successfully”
5. Repeat steps 1 to 3 for all IGF Revenue types you want to update.

How to Delete a Revenue Line

1. On the IGF Revenue setup Form, select the Revenue line by clicking on it.
2. Click on the Delete button.
3. The message below appears

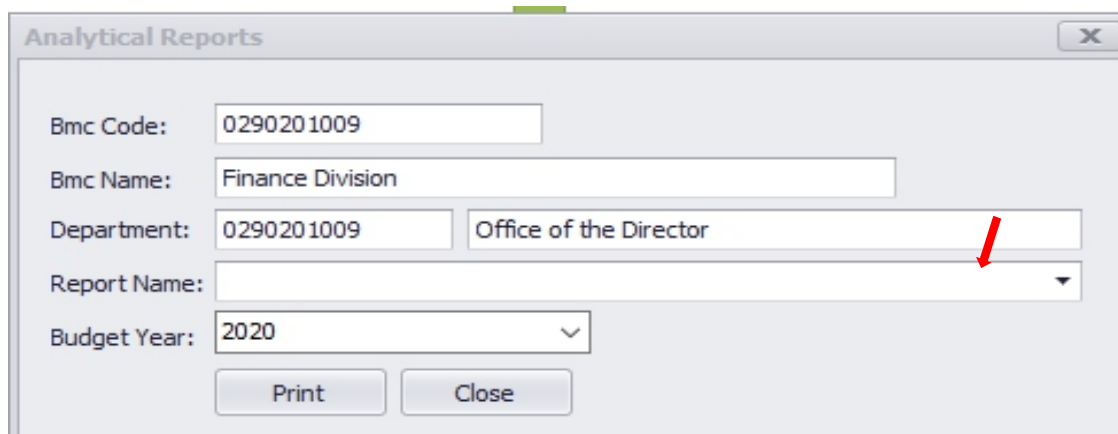


4. Click on “Yes” to delete the Item Line and its corresponding budget or click “No” to stop the deletion.
5. Repeat step 1-4 for all Revenue Item lines you want to delete.

How to print Revenue Budget

1.1.1 Department Revenue Budget Printing

1. Click on Analytical Report (under IGF projection sub-menu) to open the window



2. Select the Report Name and click on Print to preview

Analytical Reports

Bmc Code: 0290201009

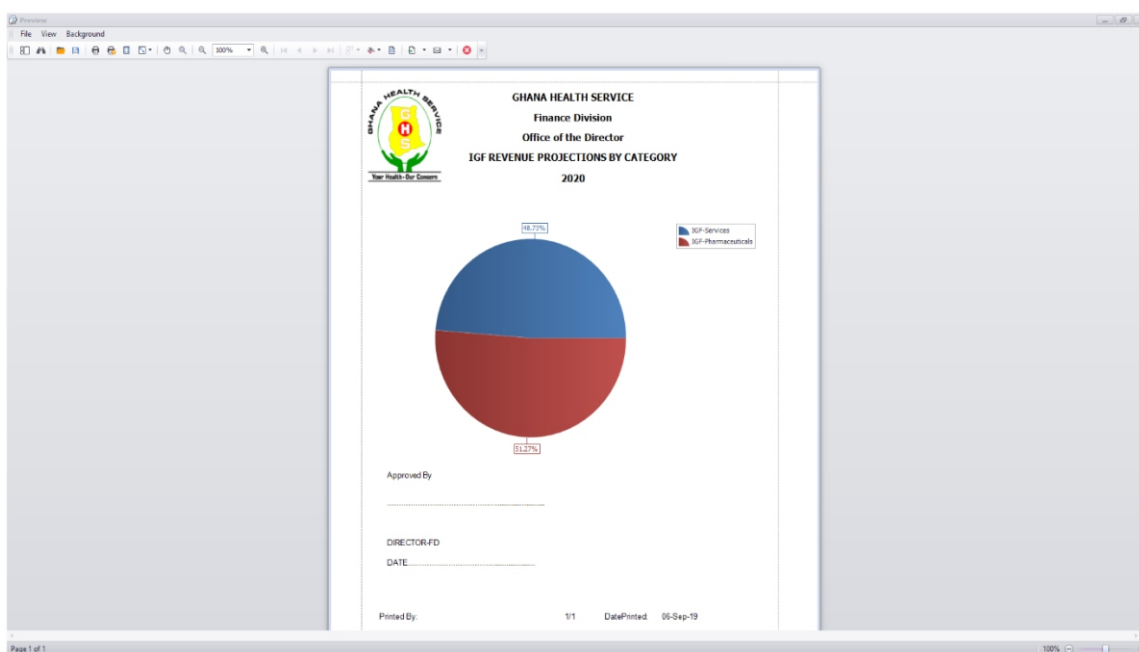
Bmc Name: Finance Division

Department: 0290201009 Office of the Director

Report Name: IGF Revenue Projection By Category

Budget Year: 2020

Print Close



1.1.2 How to print BMC Revenue Budget

1. Click on Consolidated Analytical Report (IGF Revenue Projections sub-menu) to open the Form

Consolidated IGF Reports

Bmc Code: 0290201009

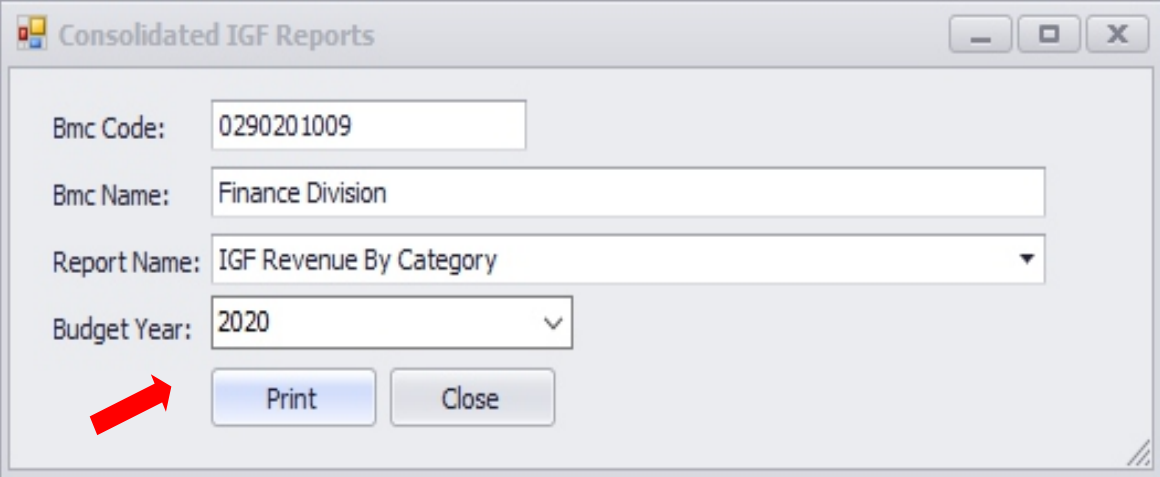
Bmc Name: Finance Division

Report Name: _____

Budget Year: 2020

Print Close

2. Select the Report Name and click on Print to preview



Consolidated IGF Reports

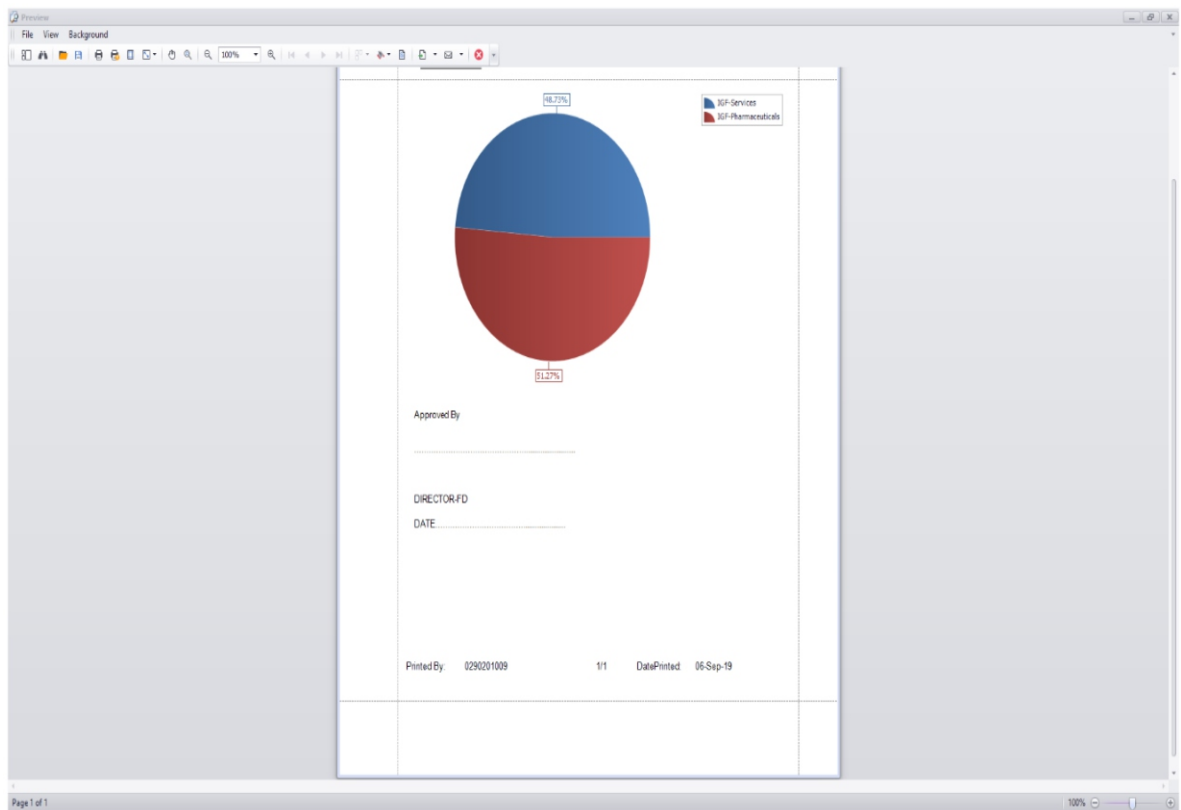
Bmc Code: 0290201009

Bmc Name: Finance Division

Report Name: IGF Revenue By Category

Budget Year: 2020

Print Close



How to Synchronize IGF Revenue Budget

1. After IGF revenue items have been entered, click on sync IGF revenue projection
2. Click on the retrieve button, then the process button.

NB: Ensure that your computer is connected to the internet before syncing

REVENUE CEILINGS

The Revenue Ceiling is used to set ceilings for BMCs to control its Expenditure Budget in order not to exceed what has been secured. This module applies to BMCs that receive GoG and SBS (e.g. Districts).

How to Set Budget Ceilings

The Revenue Ceiling is a process and hence should be followed as such.

Revenue Ceiling Setting Process

1. Set up National Ceiling and allocate a Reserve Fund
2. Set up Ceilings for Headquarters BMCs
3. Allocate Reserve Funds to Headquarters BMCs (Divisions)
4. Set up Ceilings for Regions dividing it into DHD and RHD
5. Set up Ceilings for RHD
6. Set up Ceilings for DHD

1.1.3 National Ceiling Setup

1. Click on National Allocator to open the BMC Level Allocation Form
2. Select the Source of Fund
3. Enter the National Ceiling Amount
4. If applicable enter the Reserved Fund Amount
5. Click to Save the details

BMC Level Allocation Form

Budget Year: 2020

Source of Fund: GOG-Goods and Service

National Ceiling: 6000000.00

Amt To be Allocated: 2500000.00

Reserved Funds: 3500000.00

BMC Level	Percentage Allocation	Allocated Amount
DHD	75	1,875,000.00
HQTRS	15	375,000.00
RHD	10	250,000.00

Save

1.1.4 Headquarters

1. Click Headquarters Allocator to open Headquarters Allocation Form
2. Select the Source of Fund
3. Enter the percentages to be allocated at the Percentage Allocation Review of the Table
4. Click to Save

Division Name	Percentage Allocation	Percentage Allocation Review	Allocation Amount
Public Health Division	5.00	5.00	18,750.00
Institutional Care Division	4.00	5.00	18,750.00
Store, Supplies and Drug Management	4.00	5.00	18,750.00
Health Administration Support Service	4.00	5.00	18,750.00
Family Health Division	5.00	5.00	18,750.00
Human Resource Division	7.00	5.00	18,750.00
Health Research Development Division	4.00	5.00	18,750.00
Policy Planning, Monitoring and Evaluation Division	5.00	5.00	18,750.00
Finance Division	4.00	5.00	18,750.00
Internal Audit Division	4.00	5.00	18,750.00
Office of the Director General	50.00	51.00	191,250.00
Health Promotion Division	4.00	5.00	18,750.00

Spread Evenly Save Total Amount Allocated: 397500

1.1.5 Reserved Budget

1. Click Reserved Funds to open the Reserved Funds Form
2. Select the Source of Fund
3. Enter the Reserve Amount for each Headquarters Division
4. Click the Save Button to Save

Division Name	Allocated Amt	Reserved Amt	Total Ceiling
Public Health Division	20,250.00	0.00	20,250.00
Institutional Care Division	20,250.00	0.00	20,250.00
Store, Supplies and Drug Management	20,250.00	0.00	20,250.00
Health Administration Support Service	20,250.00	0.00	20,250.00
Family Health Division	20,250.00	0.00	20,250.00
Human Resource Division	20,250.00	0.00	20,250.00
Health Research Development Division	20,250.00	0.00	20,250.00
Policy Planning, Monitoring and Evaluation Division	20,250.00	600,000.00	620,250.00
Finance Division	20,250.00	0.00	20,250.00
Internal Audit Division	20,250.00	0.00	20,250.00
Office of the Director General	227,250.00	2,900,000.00	3,127,250.00
Health Promotion Division	20,250.00	0.00	20,250.00

Save Total Amount Allocated: 3500000

1.1.6 Regional

1. Click Regional Allocator to open the Regional Allocator Form
2. Select the Source of Fund
3. Click the Save Button to Save

Regional Allocation

Budget Year: 2020

Source of Fund: GOG-Goods and Service

RHD Ceiling: 250000

DHD Ceiling: 1875000

Region Code	Region	RHD Allocation %	RHD Allocation Amt	DHD Allocation %	DHD Allocation Amt	Regional Allocation Amt
12000	AHAFO	2.31	5,769.23	2.31	43,269.23	49,038.46
01000	ASHANTI	16.54	41,346.15	16.54	310,096.15	351,442.30
02000	BONO	4.62	11,538.46	4.62	86,538.46	98,076.92
11000	BONO EAST	4.23	10,576.92	4.23	79,326.92	89,903.84
03000	CENTRAL	8.46	21,153.85	8.46	158,653.85	179,807.70
04000	EASTERN	12.69	31,730.77	12.69	237,980.77	269,711.54
05000	GREATER ACCRA	11.15	27,884.62	11.15	209,134.62	237,019.24
13000	NORTH EAST	2.31	5,769.23	2.31	43,269.23	49,038.46
06000	NORTHERN	6.15	15,384.62	6.15	115,384.62	130,769.24
15000	OTI	3.08	7,692.31	3.08	57,692.31	65,384.62
14000	SAVANNAH	2.69	6,730.77	2.69	50,480.77	57,211.54
07000	UPPER EAST	5.77	14,423.08	5.77	108,173.08	122,596.16
08000	UPPER WEST	4.23	10,576.92	4.23	79,326.92	89,903.84
09000	VOLTA	6.92	17,307.69	6.92	129,807.69	147,115.38
10000	WESTERN	5.38	13,461.54	5.38	100,961.54	114,423.08

Save Total RHD Allocation: 250000.01 Total DHD Allocation: 1875000.01

1.1.7 Regional Health Directorate - RHD

1. Click on RHD Allocator to open the RHD Form
2. Select Region and Source of Fund

GOG Ceilings-RHD Allocator

Region: ASHANTI

Budget Year: 2020

Source of Fund: GOG-Goods and Service

RHD Allocation: 49615.38

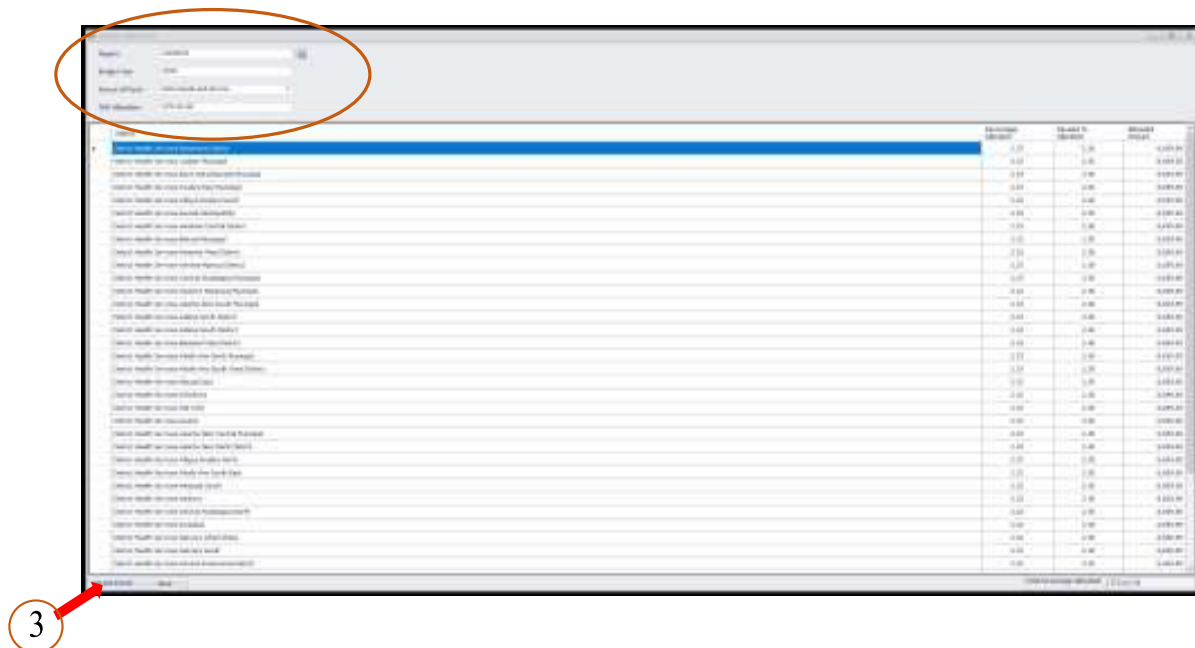
Division Name	Percentage Allocation	Revised % Allocation	Allocated Amount
Regional Hospitals-Ashanti Region	10.00	0.00	0.00
Office of the Regional Director-Ashanti Region	40.00	40.00	19,846.15
Regional Support Services-Ashanti Region	20.00	20.00	9,923.08
Regional Public Health Care Unit-Ashanti Region	10.00	20.00	9,923.08
Regional Clinical Care Unit-Ashanti Region	20.00	20.00	9,923.08

Distribute Equally Save Total Ceiling Allocated: 49615.38

3. Click the Save button to save

1.1.8 District Health Directorate - DHD

1. Click on DHD Allocator to open the DHD Allocation Form
2. Select Region and Source of Fund
3. Click on Spread Evenly to distribute percentage evenly among the Districts



NB: Always make sure the Total Percentage Allocated is equal to the Ceiling Allocation for each BMC Level

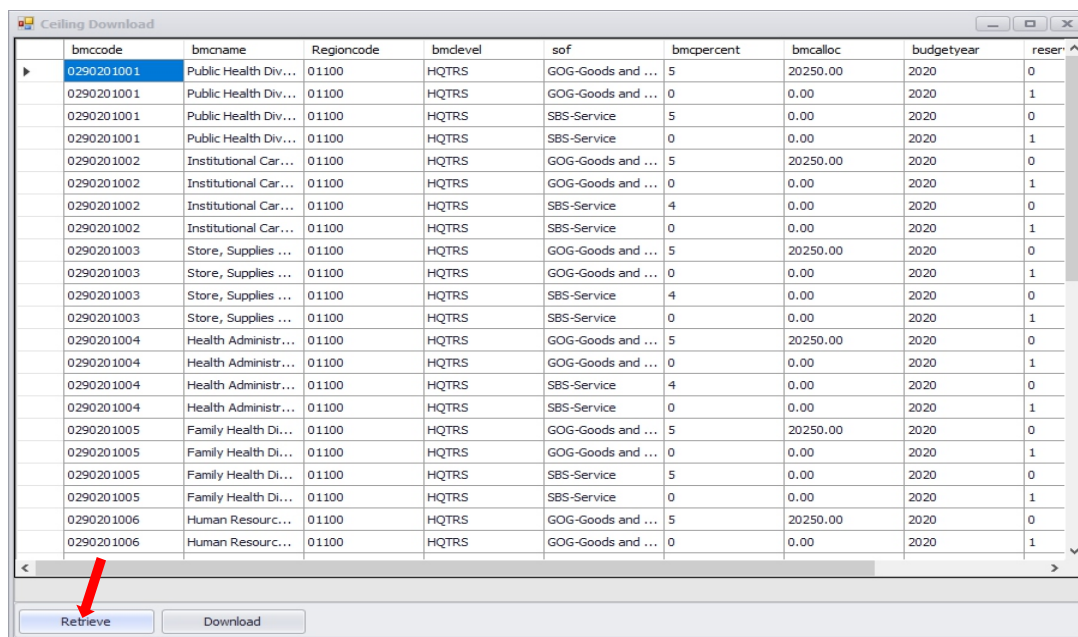
4. Click the Save button to save

Download Budget Ceilings

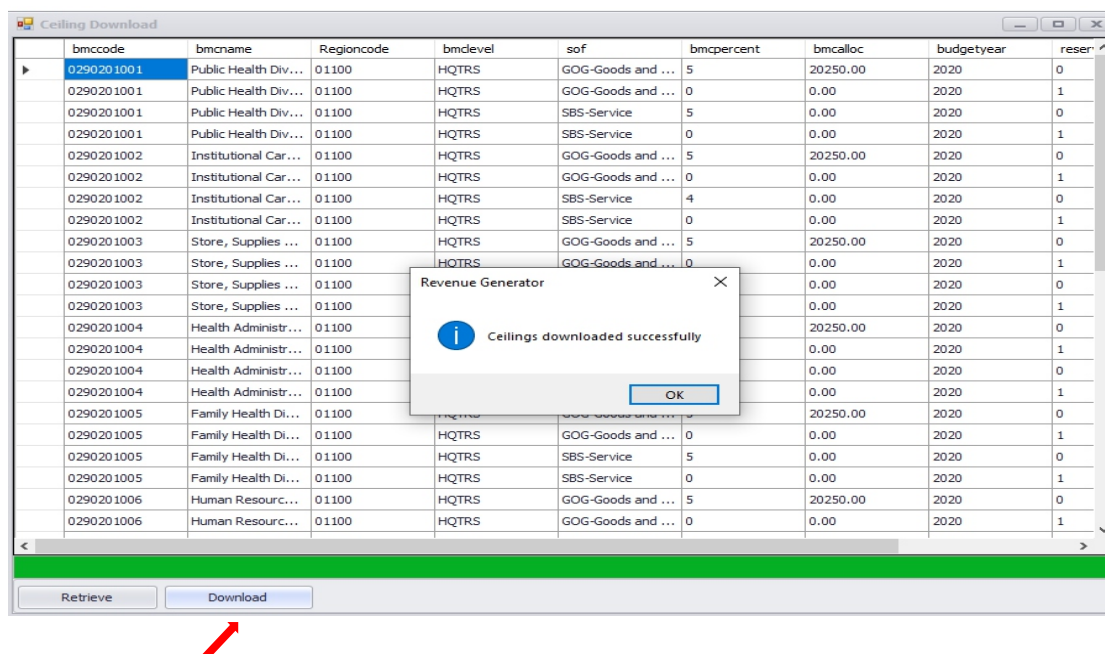
1. Login to your BMC using the online Platform
2. Under Revenue Ceilings, click on Download Budget Ceilings to open the Form



3. Click on the Retrieve Button to retrieve your budget



4. Click on the Retrieve Button to retrieve your budget



Ceiling Report

To print the ceiling report,

1. Login to PBMIS using the offline Platform
2. Expand the revenue ceiling sub-module

3. Click on Ceiling Report to open the Ceiling Report Form
4. Select the Source of Fund

Print Ceilings

HQTRS/Region ID: 01100

Description: HEADQUARTERS

Budget Year: 2020

Source of Fund: GOG-Goods and Service

BMC Level: HQTRS

Print **Close**

5. Click on the Print button to generate a report.

GHANA HEALTH SERVICE
HEADQUARTERS
CEILINGS REPORT BY BMC LEVEL
GOG-Goods and Service
2020

BMC Level	BMC Code	BMC Name	Grand Total	
			Amount Allocated	% Allocated
HQTRS	0290201001	Public Health Division	20,250.00	0.51%
	0290201002	Institutional Care Division	20,250.00	0.51%
	0290201003	Store, Supplies and Drug Management	20,250.00	0.51%
	0290201004	Health Administration Support Service	20,250.00	0.51%
	0290201005	Family Health Division	20,250.00	0.51%
	0290201006	Human Resource Division	20,250.00	0.51%
	0290201007	Health Research Development Division	20,250.00	0.51%
	0290201008	Policy Planning, Monitoring and Evaluation Division	620,250.00	15.70%
	0290201009	Finance Division	20,250.00	0.51%
	0290201010	Internal Audit Division	20,250.00	0.51%

Printed By: 0290201009 1/2 Date Printed: 06-Sep-19

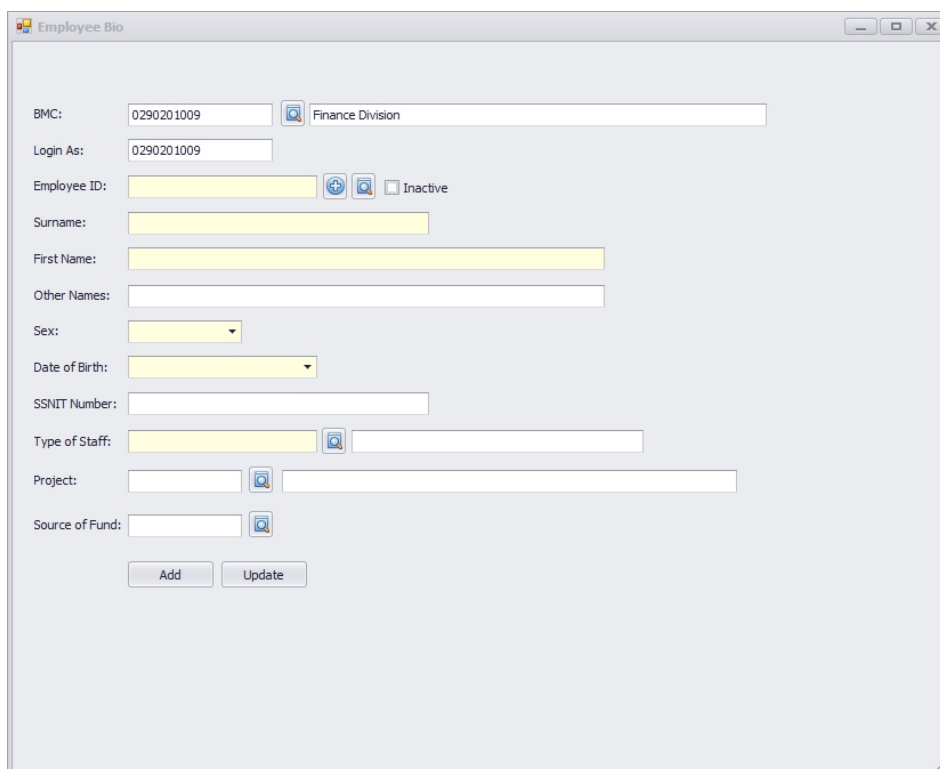
COMPENSATION BUDGETING

Nominal Role Budgeting

1.1.9 Staff Setup

1.1.9.1 Adding a New Staff

1. Click to Open Staff Setup under Compensation Menu



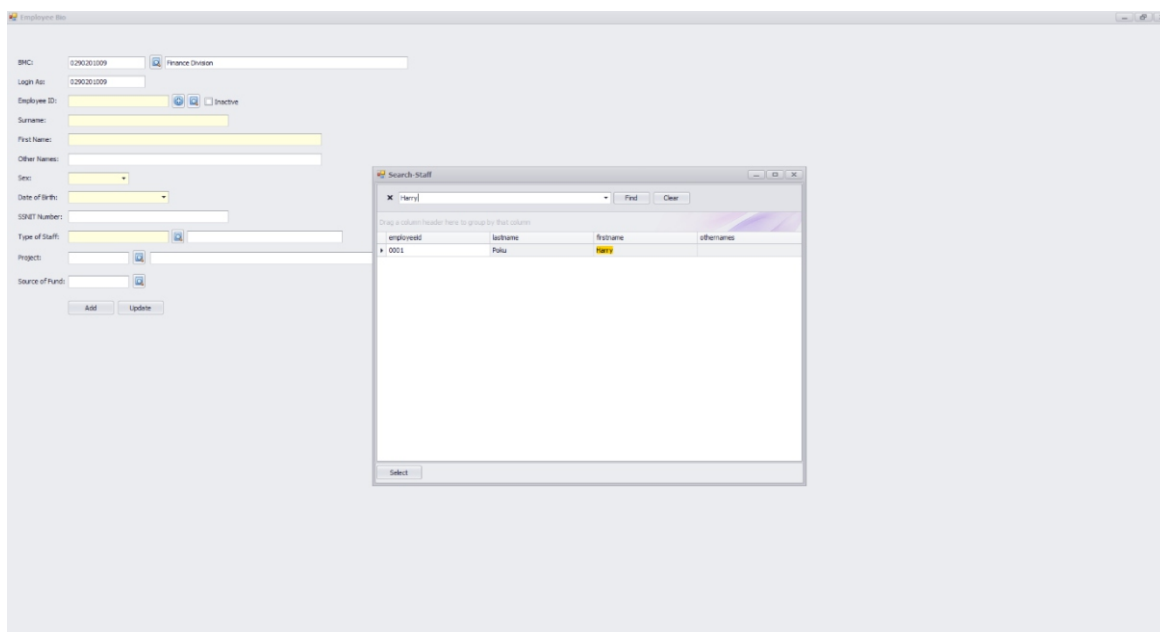
The screenshot shows a web application window titled "Employee Bio". It contains a form with the following fields and controls:

- BMC:** Text input with value "0290201009" and a search icon.
- Finance Division:** Text input with value "Finance Division" and a search icon.
- Login As:** Text input with value "0290201009".
- Employee ID:** Text input with a search icon and an "Inactive" checkbox.
- Surname:** Text input.
- First Name:** Text input.
- Other Names:** Text input.
- Sex:** Dropdown menu.
- Date of Birth:** Dropdown menu.
- SSNIT Number:** Text input.
- Type of Staff:** Text input with a search icon.
- Project:** Text input with a search icon.
- Source of Fund:** Text input with a search icon.
- Buttons:** "Add" and "Update" buttons at the bottom.

2. Enter the following details
 - i. Employee ID
 - ii. Surname*
 - iii. First Name*
 - iv. Other Names
 - v. Sex*
 - vi. SSNIT Number
3. Click on the **find icon**  to select
 - i. Type of Staff
 - ii. Project
 - iii. Source of Fund
4. Click on the Add button to add the Staff

1.1.9.2 Editing Staff Details

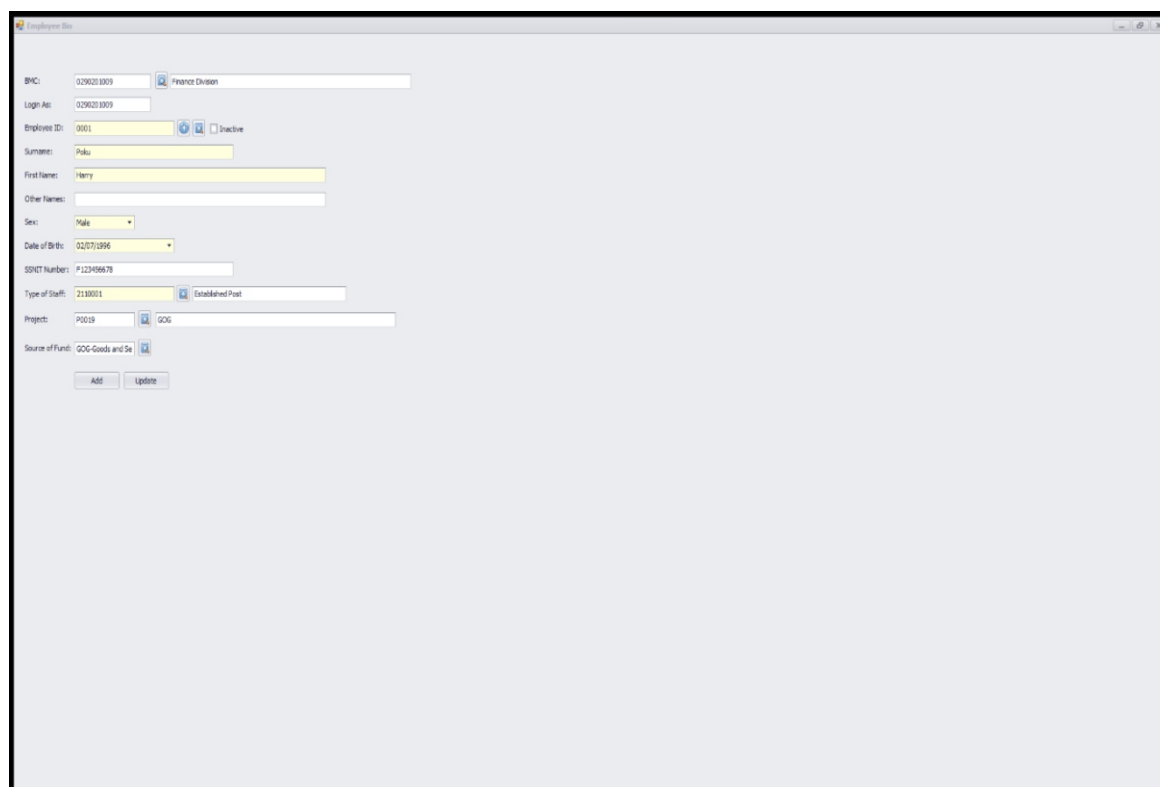
1. On the Staff Details Form, use the finder to select the Staff to edit



The screenshot shows the 'Employee Edit' form with various input fields for staff details. A 'Search Staff' dialog box is open, displaying a search result for 'Nery'. The dialog box has a search bar with 'Nery' entered and a 'Find' button. Below the search bar, there is a table with columns: 'employeeid', 'lastname', 'firstname', and 'othernames'. The table contains one row with the following values: '0001', 'Paku', 'Nery', and an empty cell. A 'Select' button is at the bottom of the dialog box.

employeeid	lastname	firstname	othernames
0001	Paku	Nery	

2. Details of Staff appear as shown in the image below



The screenshot shows the 'Employee Edit' form with the details of the selected staff member. The fields are filled with the following values:

- BMC: 0296201009
- Finance Division
- Login As: 0296201009
- Employee ID: 0001
- Inactive
- Surname: Paku
- First Name: Nery
- Other Names:
- Sex: Male
- Date of Birth: 02/07/1996
- SSNCT Number: P12345678
- Type of Staff: 2130001
- Established Post
- Projects: P0019
- GCG
- Source of Fund: GCG Goods and Se

Buttons: Add, Update

3. Make the necessary changes and Update

1.1.9.3 Making a Staff Inactive

1. On the Staff Setup Form, select the Staff to make inactive
2. Check Inactive
3. Select an Inactive Reason
4. Click on the Update button to Save

1.1.10 Staff Grading

1.1.10.1 Adding a New Grade

1. Click to Open Staff Setup under Compensation Menu
2. Use the find icon to select the Staff to add
3. Details appear on the Form as shown below

The screenshot shows a window titled "Staff Grading" with a light gray background. At the top right are standard window controls (minimize, maximize, close). The form contains several input fields and labels:

- BMC Name:** 0290201009 (with a find icon and "Finance Division" text)
- Login As:** 0290201009
- Employee ID:** 0001 (with a find icon)
- Surname:** Poku
- First Name:** Harry
- Other Names:** (empty field)
- Project:** P0019 (with a find icon)
- Source of Fund:** GQG-Goods and Service
- Current Grade:** (empty field) (with a find icon)
- Date on Current Grade:** (dropdown menu)
- Level:** (empty field)
- Steps:** (empty field) (with a find icon)
- Basic Salary:** (empty field)
- Premium:** (empty field)
- Total Salary:** 0
- Frequency:** 12
- Annual Salary:** 0

At the bottom of the form are two buttons: "Add" and "Update".

4. Add the following information
 - i. Current Grade*
 - ii The date on Current Grade
 - iii.Step

Staff Grading

BMC Name: 0290201009 Finance Division

Login As: 0290201009

Employee ID: 0001

Surname: Poku

First Name: Harry

Other Names:

Project: P0019

Source of Fund: GOG-Goods and Service

Current Grade: Chief Administrative Manager Date on Current Grade: 03/12/1999

Level: 21H Steps: 3

Basic Salary: 3406.07 Premium: 544.06 Total Salary: 3950.13

Frequency: 12 Annual Salary: 47401.56

Add Update

5. Click on Add to add the record

1.1.10.2 Editing a Grade

1. On the Staff Grading Form, select the Staff to edit
2. Make the necessary changes to the Staff Grade and click on Update

1.1.11 Staff Allowance

1.1.11.1 Adding Staff Allowance

1. Open the Staff Allowance Form

The screenshot shows the 'Staff Allowance' form. The top section contains input fields for 'BMC Name' (0290201008), 'Login As' (0290201008), 'Employee ID' (empty), 'Surname' (empty), 'First Name' (empty), 'Other Names' (empty), 'Project' (empty), and 'Source of Fund' (empty). Below this is the 'Other Allowances' section with 'Allowance Type' (empty), 'Monthly Allowance' (0.00), 'Frequency' (12), and 'Annual Allowance' (0.00). At the bottom is a table with columns: Account ID, Account Description, Monthly Allowance, Frequency, Annual Allowance, and Source of Fund. The table is currently empty. Buttons for 'Add', 'Update', and 'Remove' are at the bottom.

2. Select the Staff using the Find icon

The screenshot shows the 'Staff Allowance' form with the 'Employee ID' field populated with '1196493'. The 'Surname' field is 'Mansah', 'First Name' is 'Edith', 'Other Names' is 'Akosua', 'Project' is 'GOG', and 'Source of Fund' is 'GOG-Compensation'. The 'Other Allowances' section remains the same. The table at the bottom is still empty. Buttons for 'Add', 'Update', and 'Remove' are at the bottom.

3. Under the Other Allowances,
 - i. Select Allowance Type
 - ii. Enter the allowance Amount

Staff Allowance

BMC Name: 0290201008 Policy Planning, Monitoring and Evaluation Division

Login As: 0290201008

Employee ID: 1196493

Surname: Mansah

First Name: Edith

Other Names: Akosua

Project: GOG

Source of Fund: GOG-Compensation

Other Allowances

Allowance Type: 2112203 Car Maintenance Allowance

Monthly Allowance: 1200 Frequency: 12 Annual Allowance: 14400

Drag a column header here to group by that column

Account ID	Account Description	Monthly Allowance	Frequency	Annual Allowance	Source of Fund
------------	---------------------	-------------------	-----------	------------------	----------------

Add Update Remove

4. Click the Add button to add the Allowance

Staff Allowance

BMC Name: 0290201008 Policy Planning, Monitoring and Evaluation Division

Login As: 0290201008

Employee ID: 1196493

Surname: Mansah

First Name: Edith

Other Names: Akosua

Project: GOG

Source of Fund:

Other Allowances

Allowance Type: Car Maintenance Allowance

Monthly Allowance: Frequency: Annual Allowance:

Drag a column header here to group by that column

Account ID	Account Description	Monthly Allowance	Frequency	Annual Allowance	Source of Fund
2112203	Car Maintenance Allowance	1200	12	14400	GOG-Compensation

Add Update Remove

1.1.11.2 Editing Staff Allowance

1. On the Staff Allowance Form, select the Staff to Edit
2. Make changes to the Allowances information
3. Click on Update

1.1.11.3 Removing Staff Allowance

1. On the Staff Allowance Form, select the Staff to Edit
2. On the Staff Allowance Table, select the Allowance to remove
3. Click on the Remove button to remove the allowance

1.1.12 Uploading Nominal Role Budget

1. Click to Open Import Nominal Role Data Form



2. On the Form, click on Open to locate the Upload file

NB: Upload file should always be in excel

GHANA HEALTH SERVICE
EMPLOYEE COMPENSATION BUDGET REPORT
Policy Planning, Monitoring and Evaluation Division

Employee ID	Surname	First Name	Other Names	Grade	Level	Step	Account ID	Account Description	Source of Fund	Total Amount
104003	Bempah	Ben Smith Owusu		Deputy Director	22H	4	2110001	Established Post	GOG-Compensation	89,217.60
10607	Amanah	Divine	K	Senior Biostatistics	18L	5	2110001	Established Post	GOG-Compensation	31,100.64
111048	Boakye	Kwabena Boateng		Specialist	24L	4	2110001	Established Post	GOG-Compensation	37,839.48
1195838	Alawiyie	Rabiatu		Administrative Mand	16H	1	2110001	Established Post	GOG-Compensation	25,836.72
1194493	Mansah	Edith	Alicious	Administrative Mand	16H	1	2110001	Established Post	GOG-Compensation	25,836.72
							2112203	Car Maintenance Al	GOG-Compensation	14,400.00
1 Total										40,236.72

3. Click on Upload to upload Nominal Role Budget

Employee ID	First Name	Last Name	Other Names	Date of Birth	Staff Type ID	BMC Code	Inactive	SSNET	Sex	Project	Salary Level	Salary Grade	Step	Source of Fund
112381	Acquah	Ador	C	01/05/1962	21.00001	0290201008	0	PI 16000040039	Male	GOG	184	Principal Scientist	2	GOG-Compensation...
446651	George	Ador	Kwame	24/08/1962	21.00001	0290201008	0	PI 16000040039	Male	GOG	184	Senior Technical ...	5	GOG-Compensation...
760552	Yvonnev Kwaku	Agbete		16/03/1961	21.00001	0290201008	0	JOSS 020000006	Male	GOG	185	Senior Scientist	2	GOG-Compensation...
1105838	Rufaku	Alawura		26/12/1960	21.00001	0290201008	0	CI 18912060127	Female	GOG	184	Administrative M...	1	GOG-Compensation...
10687	Deine	Ameyah		07/02/1964	21.00001	0290201008	0	JO 04400000008	Male	GOG	185	Senior Scientist	5	GOG-Compensation...
807241	Joe	Ameyah	K	16/06/1965	21.00001	0290201008	0	CI 16000040005	Male	GOG	185	Senior Scientist	1	GOG-Compensation...
43004	Sophia Nanao	Anquah Kusi		12/08/1972	21.00001	0290201008	0	PI 17000120022	Female	GOG	184	Principal Health ...	3	GOG-Compensation...
500275	Freddie	Ansahmah		17/12/1970	21.00001	0290201008	0	CI 17912170010	Male	GOG	176	Principal Technic...	5	GOG-Compensation...
806154	Thomas	Ansahmah		24/05/1976	21.00001	0290201008	0	PI 17051240059	Male	GOG	185	Senior Scientist	1	GOG-Compensation...
705062	Philo	Ator	Kwesi	16/08/1964	21.00001	0290201008	0	CI 46400100038	Male	GOG	185	Senior Nursing O...	5	GOG-Compensation...
6118	Jackeline	Atongah	A	05/02/1969	21.00001	0290201008	0	CI 70100001029	Female	GOG	185	Assistant Chief ...	5	GOG-Compensation...
430689	Doreen	Atkinson		18/01/1977	21.00001	0290201008	0	CI 17701180115	Male	GOG	185	Senior Technical ...	1	GOG-Compensation...
17290	David	Awasom Williams	K	17/12/1961	21.00001	0290201008	0	CI 20000000017	Male	GOG	176	Director - GHS M...	7	GOG-Compensation...
820885	Alidu	Ayi		01/04/1977	21.00001	0290201008	0	CI 127704010032	Male	GOG	185	Senior Scientist	1	GOG-Compensation...
599977	Didson	Azuwah	K	02/02/1968	21.00001	0290201008	0	CI 46400100070	Male	GOG	176	Principal Driver	1	GOG-Compensation...
814718	Angeline	Bah		17/08/1981	21.00001	0290201008	0	CI 170602010014	Female	GOG	185	Senior Technical ...	1	GOG-Compensation...
56521	Patricia	Babawana		11/05/1963	21.00001	0290201008	0	DO98309100025	Female	GOG	176	Senior Nursing O...	1	GOG-Compensation...
104023	Ben Smith Osei	Bamph		06/01/1972	21.00001	0290201008	0	PI 17201000038	Male	GOG	234	Deputy Director	4	GOG-Compensation...
111498	Kwabena Boateng	Boateng		06/09/1970	21.00001	0290201008	0	PI 17000000075	Male	GOG	176	Specialist	4	GOG-Compensation...
490466	Anthony	Dennis	Boateng	27/12/1967	21.00001	0290201008	0	GO 08712270063	Male	GOG	185	Senior Technical ...	1	GOG-Compensation...
26120	David	Engelbert	O	26/07/1961	21.00001	0290201008	0	CI 16100000014	Male	GOG	234	Deputy Chief Exec...	1	GOG-Compensation...
66110	Esther	Effah Afari		28/05/1978	21.00001	0290201008	0	CI 17051280180	Female	GOG	185	Senior Scientist	1	GOG-Compensation...
455763	Leslie	Obertse	Tatiah	11/04/1964	21.00001	0290201008	0	CI 04401100238	Male	GOG	185	Senior Technical ...	1	GOG-Compensation...
27629	Reena	Hammond		12/05/1964	21.00001	0290201008	0	AB-HA-011200011	Male	GOG	184	Principal Scientist	1	GOG-Compensation...
86464	Kwabie Emmanuel	Korir		23/09/1969	21.00001	0290201008	0	CI 16700240115	Male	GOG	234	Chief Health Pla...	1	GOG-Compensation...
922006	Paulina	Kum		10/06/1969	21.00001	0290201008	0	CI 164004100167	Female	GOG	185	Senior Technical ...	1	GOG-Compensation...
46427	Charles R	Lamptey		13/05/1967	21.00001	0290201008	0	CI 16705100121	Female	GOG	185	Assistant Chief ...	1	GOG-Compensation...
56670	Phelix	Lebo Odeh	Reuben	18/07/1981	21.00001	0290201008	0	PI 187007100011	Male	GOG	185	Senior Public He...	1	GOG-Compensation...
814717	James	Malae		27/04/1978	21.00001	0290201008	0	BO17040170010	Male	GOG	185	Senior Technical ...	1	GOG-Compensation...
1106463	Bath	Mamah	Reuben	10/03/1965	21.00001	0290201008	0	CI 18002100082	Female	GOG	184	Administrative M...	1	GOG-Compensation...
26294	Paulina	Muhammad		19/01/1965	21.00001	0290201008	0	CI 16004000044	Female	GOG	185	Senior Scientist	1	GOG-Compensation...
820000	Abraham	Harley	Yaye	21/03/1964	21.00001	0290201008	0	CI 18403210007	Female	GOG	185	Senior Technical ...	1	GOG-Compensation...
530767	Belinda	Nanaia	A	15/12/1978	21.00001	0290201008	0	CI 17812100153	Female	GOG	246	Specialist	3	GOG-Compensation...
96006	Joyce Koror	Obetor		11/05/1961	21.00001	0290201008	0	PI 16001140012	Female	GOG	176	Senior Technical...	1	GOG-Compensation...
1106503	Paulina	Offin-Adu	Afia	11/09/1981	21.00001	0290201008	0	CI 180101100024	Female	GOG	184	Health Planner	1	GOG-Compensation...
46427	Anthony	Offin	A	23/01/1965	21.00001	0290201008	0	CI 16001200130	Female	GOG	246	Senior Specialist	5	GOG-Compensation...
810155	Benjamin	Techin-Akpan		06/01/1965	21.00001	0290201008	0	PI 16001000000	Female	GOG	185	Senior Scientist	1	GOG-Compensation...
921060	Fardeen	Zakariah	M	16/07/1963	21.00001	0290201008	0	PI 18307160107	Male	GOG	184	Health Planner	5	GOG-Compensation...
9999999	Paul		M	26/11/1966	21.00001	0290201008	0	PI 17010010000	Male	GOG	184	Health Planner	1	GOG-Compensation...
9999998	Oyoku	Henry	M	26/11/1986	21.00001	0290201008	1	PI 18307160109	Male	GOG	184	Health Planner	5	GOG-Compensation...

1.1.13 Running Nominal Role Budget

1. Click to Open Nominal Role Budgeting Form

Compensation

BMC:

0290201008

BMC Name:

Policy Planning, Monitoring and Evaluation Division

Budget Year:

2020

Generate Budget

2. Select Budget Year and click on Generate Budget

3. Below should be the result

GHANA HEALTH SERVICE EMPLOYEE COMPENSATION BUDGET REPORT Policy Planning, Monitoring and Evaluation Division										
Employee ID	Surname	First Name	Other Names	Grade	Level	Step	Account ID	Account Description/Source of Fund	Total Amount	Total
114433	Bamph	Ben Smith Osei		Deputy Director	234	4	2110001	Established Post	GOG-Compensation	89,217.60
10687	Ameyah	Deine	K	Senior Scientist	184	5	2110001	Established Post	GOG-Compensation	31,109.44
111498	Boateng	Kwabena Boateng		Specialist	246	4	2110001	Established Post	GOG-Compensation	37,839.48
119538	Alawura	Rufaku		Administrative Man	184	1	2110001	Established Post	GOG-Compensation	25,876.72
119495	Mamah	Lebo	Alawura	Administrative Man	184	1	2110001	Established Post	GOG-Compensation	25,876.72
							2112203	Car Maintenance A	GOG-Compensation	14,402.80
							1	Total		42,276.72
1194508	Offin-Adu	Paulina	Afia	Health Planner	184	1	2110001	Established Post	GOG-Compensation	25,876.72
17319	AwasomWilliams	D	K	Director - GHS Nat	256	3	2110001	Established Post	GOG-Compensation	6.00
26120	Engelbert	David	O	Deputy Chief Exec	234	1	2110001	Established Post	GOG-Compensation	43,948.20
27629	Hammond	Reena		Principal Scientist	184	1	2110001	Established Post	GOG-Compensation	33,835.56
26394	Muhammad	Patina		Senior Administrator	246	1	2110001	Established Post	GOG-Compensation	29,072.44
46427	Lamptey	Charles R		Assistant Chief Tech	184	1	2110001	Established Post	GOG-Compensation	25,048.48
594276	Ampomah	Freddie		Principal Technical	174	5	2110001	Established Post	GOG-Compensation	24,494.44
512281	Adje	Asquah	C	Deputy Director	234	5	2110001	Established Post	GOG-Compensation	6.00
539767	Nanaia	Belinda	A	Specialist	246	3	2110001	Established Post	GOG-Compensation	37,204.56
56570	Lebo Odeh	Phelix		Senior Public Health	184	1	2110001	Established Post	GOG-Compensation	35,695.20
56570	Lebo Odeh	Phelix		Senior Public Health	184	1	2110001	Established Post	GOG-Compensation	32,892.84
58058	Obetor	Joyce Koror		Senior Executive Of	184	5	2110001	Established Post	GOG-Compensation	21,622.44
599977	Azuwah	Didson	K	Principal Driver	184	1	2110001	Established Post	GOG-Compensation	12,267.76
600027	Aduah	Doreen		Principal Scientist	184	2	2110001	Established Post	GOG-Compensation	34,410.72
6118	Atongah	Nichollita	A	Assistant Chief Tech	184	5	2110001	Established Post	GOG-Compensation	35,098.56
62064	Anquah Kusi	Sophia Nanao		Principal Health Pl	184	5	2110001	Established Post	GOG-Compensation	35,195.72
66110	Effah Afari	Esther		Senior Administrator	184	1	2110001	Established Post	GOG-Compensation	29,072.44
694231	Adu	George	Kwame	Senior Technical Of	184	5	2110001	Established Post	GOG-Compensation	26,879.44
694466	Dennis	Anthony	Boateng	Senior Technical Of	184	1	2110001	Established Post	GOG-Compensation	26,881.16
691768	Gbeabe	Leslie	Tatiah	Senior Technical Of	184	1	2110001	Established Post	GOG-Compensation	26,881.16

3. Click on the Process button to Sync the Budget

staffID	employment	Firstname	Lastname	ethnname	dob	staffPost	insscode	inactive	sent	inssreason	sex	program	sub	sublevel	Grade	step	doborgdate	BudgetYear	
6	119638	Nabeela	Almasri		26/12/1980	2100001	02962001008	0	CS1891220027...		Female	GOC	...	GOC-Compensat...	18H	Administrative M...	1	01/01/2019	2020
32	119643	Beth	Almasri		06/01/1985	2100001	02962001008	0	CS1891220038...		Female	GOC	...	GOC-Compensat...	18H	Administrative M...	1	01/01/2019	2020
37	119650	Radwa	Chalabi	Alfa	11/09/1981	2100001	02962001008	0	CS1891220027...		Female	GOC	...	GOC-Compensat...	18H	Health Nurse	1	01/01/2019	2020
15	1709	...	Deborah Williams	K	21/06/1980	2100001	02962001008	0	CS2208030107...		Male	GOC	...	GOC-Compensat...	20H	Director - DHS	3	01/01/2019	2020
23	26100	Daniel	Donohue	O	20/07/1961	2100001	02962001008	0	CS1810620054...		Male	GOC	...	GOC-Compensat...	20H	Deputy Chief...	1	01/01/2019	2020
26	27629	Emma	Hammond		12/04/1964	2100001	02962001008	0	AS0464120021...		Male	GOC	...	GOC-Compensat...	18H	Principal Book...	1	01/01/2019	2020
33	36394	Fatma	Hammond		30/04/1968	2100001	02962001008	0	CS1660430004...		Female	GOC	...	GOC-Compensat...	18H	Senior Adminis...	1	01/01/2019	2020
29	46437	Geoffrey	Lamprey		12/05/1967	2100001	02962001008	0	CS1791030123...		Male	GOC	...	GOC-Compensat...	18H	Assistant Chie...	1	01/01/2019	2020
10	509275	Amr	Almasri		17/12/1979	2100001	02962001008	0	CS1791030123...		Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
3	512381	Acquah	Ally	C	11/09/1960	2100001	02962001008	0	PS1600590005...		Male	GOC	...	GOC-Compensat...	23H	Deputy Director	5	01/01/2019	2020
35	530767	Nabeela	Husaini	A	15/12/1978	2100001	02962001008	0	CS1781250023...		Female	GOC	...	GOC-Compensat...	24H	Specialist	3	01/01/2019	2020
19	56531	Felicia	Barbarino		11/09/1963	2100001	02962001008	0	DS0830911002...		Female	GOC	...	GOC-Compensat...	18H	Senior Nursing...	1	01/01/2019	2020
30	568570	Leila	Lari Odeh		18/07/1961	2100001	02962001008	0	PS1870870002...		Male	GOC	...	GOC-Compensat...	18H	Senior Public H...	1	01/01/2019	2020
26	58038	Jacyn Taylor	Almasri		14/02/1963	2100001	02962001008	0	CS2430140002...		Female	GOC	...	GOC-Compensat...	18H	Senior Detectiv...	5	01/01/2019	2020
17	599977	Adrian	Almasri	K	02/02/1968	2100001	02962001008	0	CS1463010000...		Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
2	600057	Doris	Adams		01/10/1962	2100001	02962001008	0	CS1163100039...		Male	GOC	...	GOC-Compensat...	18H	Principal Techn...	2	01/01/2019	2020
13	6155	Nabeela	Almasri	A	05/10/1969	2100001	02962001008	0	CS1701005129...		Female	GOC	...	GOC-Compensat...	18H	Assistant Chie...	5	01/01/2019	2020
9	63084	Sophia Kenana	Amratty K		12/08/1972	2100001	02962001008	0	CS11700812002...		Female	GOC	...	GOC-Compensat...	18H	Principal Tech...	5	01/01/2019	2020
24	66110	Debra	Eller	Alfa	28/05/1976	2100001	02962001008	0			Female	GOC	...	GOC-Compensat...	18H	Senior Adminis...	1	01/01/2019	2020
4	666631	Amr	Almasri	K	21/08/1982	2100001	02962001008	0			Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
23	690466	Adrian	Bandaru		27/12/1987	2100001	02962001008	0			Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
25	691768	Leila	Donohue	Turkey	11/04/1984	2100001	02962001008	0			Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
5	700952	Ummad Ibrahim	Almasri		04/02/1981	2100001	02962001008	0			Male	GOC	...	GOC-Compensat...	18H	Senior Station...	1	01/01/2019	2020
12	700962	Philip	Almasri	Karee	18/08/1984	2100001	02962001008	0			Male	GOC	...	GOC-Compensat...	18H	Senior Nursing...	5	01/01/2019	2020
11	858334	Thomas	Arkanhat		24/05/1976	2100001	02962001008	0	PS1790210000...		Male	GOC	...	GOC-Compensat...	18H	Senior Station...	1	01/01/2019	2020
18	814719	Gregory	Almasri		11/08/1981	2100001	02962001008	0	CS1790210000...		Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
31	814737	James	Almasri		27/04/1978	2100001	02962001008	0	PS1790210000...		Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
16	832885	Alsu	Ally		01/04/1977	2100001	02962001008	0	CS1277040032...		Male	GOC	...	GOC-Compensat...	18H	Senior Station...	1	01/01/2019	2020
34	832900	Abraham	Hart	Tyre	21/03/1984	2100001	02962001008	0	CS1840321009...		Female	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
28	832906	Patience	Kum		15/04/1984	2100001	02962001008	0	CS1830010067...		Female	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
39	836135	Indrajit	Thiruvallthy		06/05/1980	2100001	02962001008	0	PS1800930003...		Female	GOC	...	GOC-Compensat...	18H	Senior Bookbinder	1	01/01/2019	2020
9	837341	...	Almasri	Marine	18/05/1980	2100001	02962001008	0	CS1800930003...		Female	GOC	...	GOC-Compensat...	18H	Senior Adminis...	1	01/01/2019	2020
14	838689	Donnic	Almasri		18/05/1977	2100001	02962001008	0	CS1770180135...		Male	GOC	...	GOC-Compensat...	18H	Senior Techni...	1	01/01/2019	2020
38	8667	Anthony	Ottu	A	23/01/1965	2100001	02962001008	0	CS1650121030...		Female	GOC	...	GOC-Compensat...	24H	Senior Specialist	5	01/01/2019	2020
40	824560	Fardeen	Zakaria	M	18/07/1983	2100001	02962001008	0	PS1830710037...		Male	GOC	...	GOC-Compensat...	18H	Health Planner	5	01/01/2019	2020
27	96484	Nazky Elmasruti	Kantar		23/09/1969	2100001	02962001008	0	CS1879040125...		Male	GOC	...	GOC-Compensat...	23H	Chief Health Pl...	1	01/01/2019	2020
42	9999999	Philip	Henry	M	26/11/1999	2100001	02962001008	1	PS1830710039...		Male	GOC	...	GOC-Compensat...	18H	Health Planner	5	01/01/2019	2020
43	9999999	Philip	Henry	M	26/11/1999	2100001	02962001008	0	PS1830710039...		Male	GOC	...	GOC-Compensat...	18H	Health Planner	5	01/01/2019	2020

Staff Promotion

1.1.15 Adding a Staff Promotion

1. Open the Staff Promotion Form
2. Select the Staff to promote

Staff Promotion/Budget

Promotion Summary

SPC Name: 02962001008 Policy Planning, Monitoring and Evaluation Division

LogIn: 02962001008 Budget Year: 2020

Employee ID: 119640 Summary: Subsidiary First Name: Subsidiary Other Name: Subsidiary

Current Grade: 119640 Sub Category: Administrative Manager

Project ID: 600 Source of Fund: GOC-Compensation

Annual Current Salary: 22276.24 Annual Allowance: 1440 Annual Current Gross: 26716.24

Annual Upgrade Salary: 24072.64 Annual Upgrade Allowance: 1500.00 Annual Upgrade Gross: 44072.64

Annual Promotion Salary: 4794.4 Annual Promotion Allowance: 1200 Annual Promotion Gross: 7994.4

Upgrade Details

Promotion Grade: Senior Administrative Manager

Level: 16 Step: 1

Basic Salary: 2089.04 Premiums Salary: 333.68 Total Salary: 2422.72

Promotion Allowance: 211200 Car Maintenance Allowance

Allowance Type: 1300.00 Frequency: 12 Annual Allowance: 15000.00

Allowance Details

Allowance ID	Allowance Description	Allowance Amount	Frequency	Total Amount
211200	Car Maintenance Allowance	1300.00	12	15600.00

Save Delete

3. Select the Promotion Grade

4. Use the Promotion Allowance section to Add Promotion Allowance

NB: Only Add Promotion Allowance if the Staff is entitled to it. If the staff is not entitled to point 5.

- Click on the Save button to save the record.

Staff Promotion Budget

Promotion Summary

SMC Name: 0290201008 Policy Planning, Monitoring and Evaluation Division
 Login: 0290201008 Budget Year: 2020
 Employee ID: 1196493 Surname: Mansah First Name: Esh Other Names: Alousa
 Current Grade: Administrative Manager Staff Category: Administrative Manager
 Project ID: GOG Source of Fund: GOG-Compensation

Annual Current Salary: 22279.24 Annual Allowance: 14400 Annual Current Gross: 36679.24
 Annual Upgrade Salary: 28072.64 Annual Upgrade Allowance: 15600.00 Annual Upgrade Gross: 44672.64
 Annual Promotion Salary: 6794.4 Annual Promotion Allowance: 1200 Annual Promotion Gross: 7994.4

Upgrade Details

Promotion Grade: Senior Administrative Manager
 Level: 18L Step: 1
 Basic Salary: 2089.04 Premium Salary: 333.68 Total Salary: 2422.72

Promotion Allowance

Allowance Type: 2112203 Car Maintenance Allowance
 Monthly Allowance: 1300.00 Frequency: 12 Annual Allowance: 15600.00

Drag a column header here to group by that column

Allowance ID	Allowance Description	Allowance Amount	Frequency	Total Amount
2112203	Car Maintenance Allowance	1300.00	12	15600.00

Save Delete

1.1.16 Editing of Staff Promotion

- Open the Staff Promotion Form
- Select the Staff to edit
- Make the necessary changes and click on Save

NB: To make changes to the Allowances when editing, after selecting the Staff to edit, use the Promotion Allowance sub section to remove the Allowance

1.1.16.1 Removing an Allowance from Staff Promotion

- Open the Staff Promotion Form
- Select the Staff to edit
- Go to the Promotion Allowance Sub-section.
- Select the Allowance from the Table
- Click on the Remove button to remove the Allowance.

1.1.17 Removing Staff Promotion

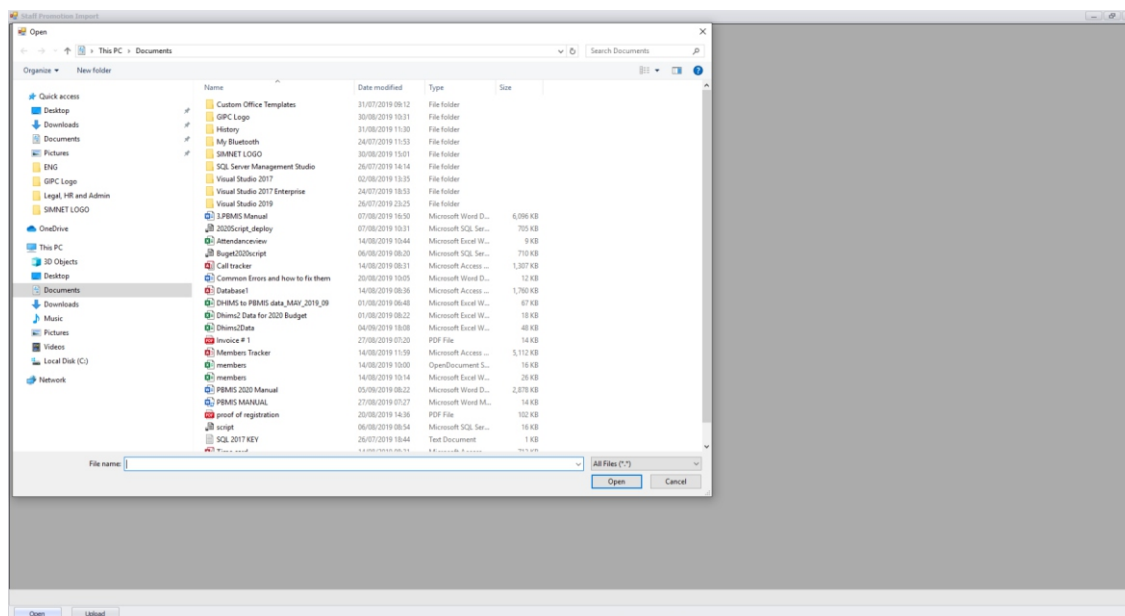
1. Open the Staff Promotion Form
2. Select the Staff to remove
3. Remove all allowances by following instructions on “Removing an Allowance from Staff +Promotion” (chapter 7 subsection 7.3.2.1)
4. Click on the Delete button to remove the Staff Promotion.

1.1.18 Uploading Staff Promotion

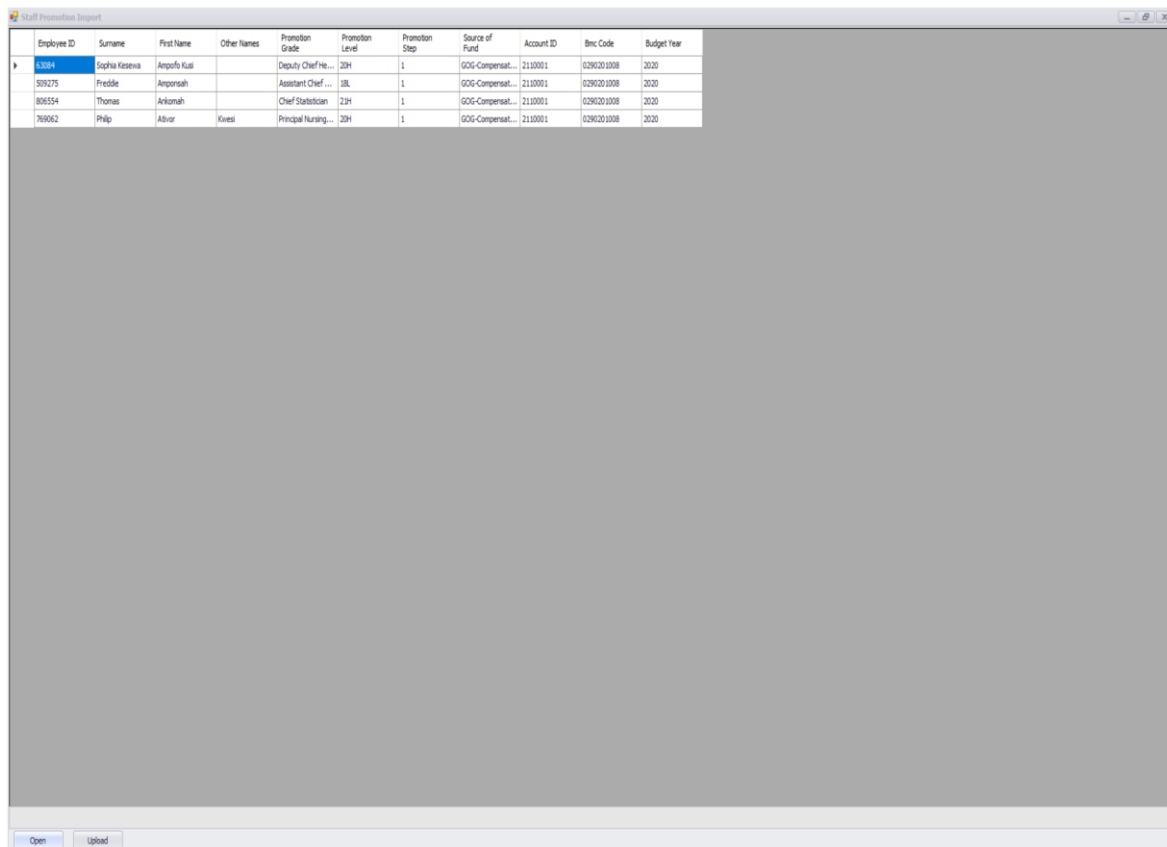
1. Open the Import Promotion Data Form



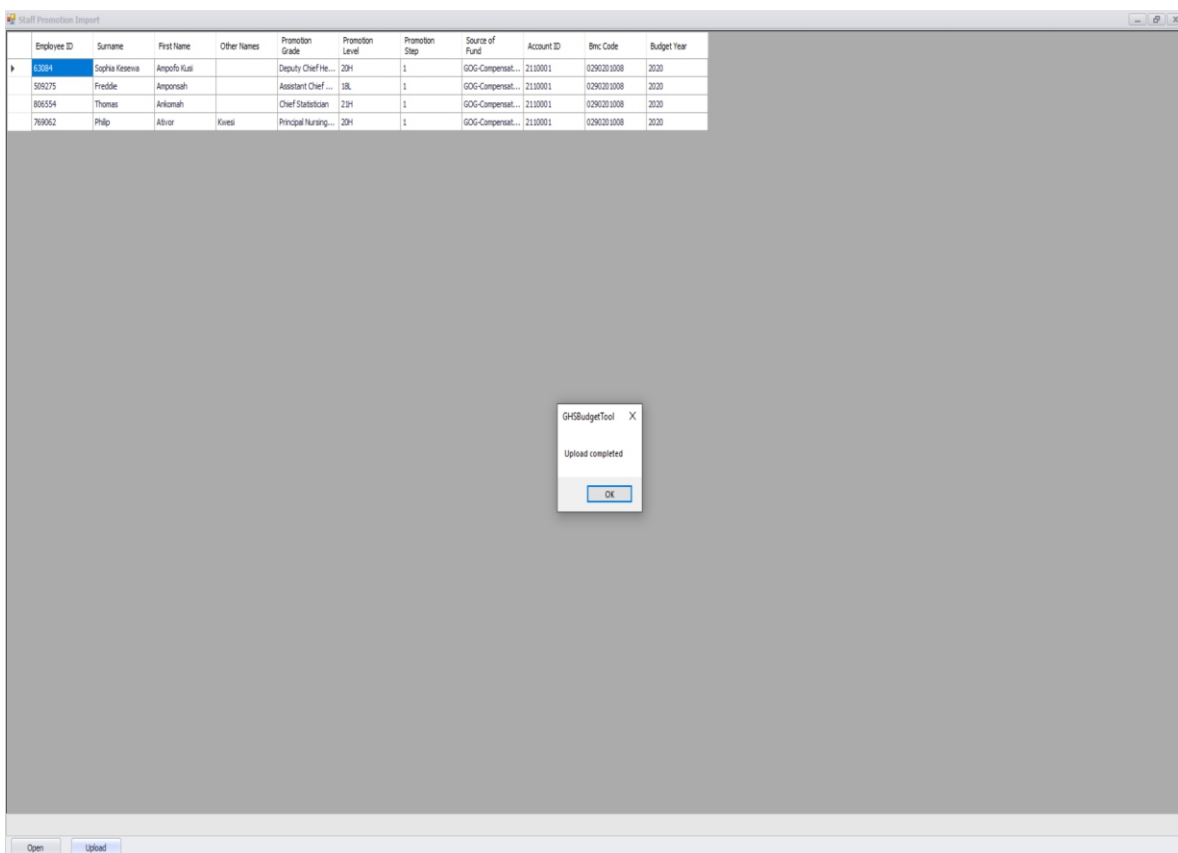
2. Click the Open button to search for the file to load from your computer



3. Select the file and click open to load the file



4. Click Upload to save the file



1.1.19 Staff Promotion Sync

1. Open the Promotion Budget Sync Form

Employee ID	First Name	Last Name	Other Names	Projected Total Amount	Current Total Amount	Promotion Cost	Source of fund	BMC Code	budgetyear	project
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Retrieve Process

2. Click on the Retrieve Button to retrieve all Promotion Budget records for the Budget Year

Employee ID	First Name	Last Name	Other Names	Projected Total Amount	Current Total Amount	Promotion Cost	Source of fund	BMC Code	budgetyear	project
509275	Freddie	Amponsah		2089.04	2054.12	34.92	GOG-Compensat...	0290201008	2020	GOG
63084	Sophia Kesewa	Ampofo Kusi		2877.69	2600.87	276.82	GOG-Compensat...	0290201008	2020	GOG
769062	Philip	Ativor	Kwesi	2877.69	2431.28	446.41	GOG-Compensat...	0290201008	2020	GOG
806554	Thomas	Ankomah		3293.15	2089.04	1204.11	GOG-Compensat...	0290201008	2020	GOG

Retrieve Process

3. Click on the Process button to sync Promotion Budget with Consolidated Online Data

3. Enter the Number of new Facilities (that is the number of facilities the new recruitment is being done for)
4. Click on the Save button to save

1.1.21 Editing Recruitment-New Facility Budget

1. Open the Recruitment-New Facility Form
2. Select the Facility Type and Category
3. The Budget generated will appear
4. Click on the Delete button to delete it
5. Modify the parameters (Type of Facility, Facility Category and number of Facilities)
6. Click on the Save button to save the modified data

1.1.22 Adding Recruitment for Existing Facilities

1. Open the Recruitment- Existing Facility Form

Recruitment Budget-Existing Facility

Drop Filter Fields Here

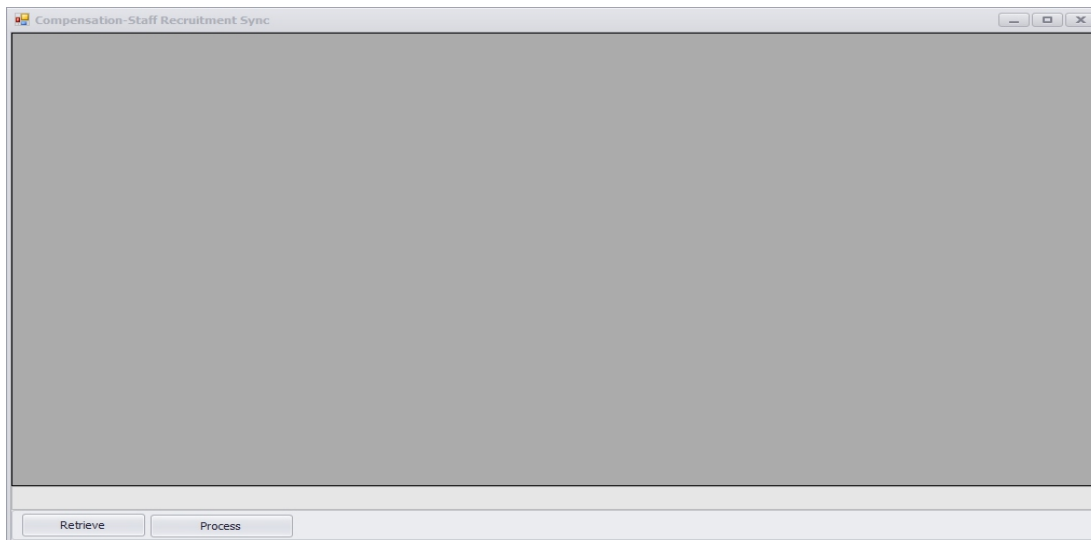
Qty	Budget Amount	Facility Category
Facility Type	Staff Category	Grand Total
Grand Total	Qty	Budget Amount

Generate Save

2. Click on Generate Button to generate Recruitment Budget based on staffing Norms by Facility Type and Category
3. Click on the Save button to save

1.1.23. Staff Recruitment Sync

1. Click on Recruitment Budget Sync to open the Form



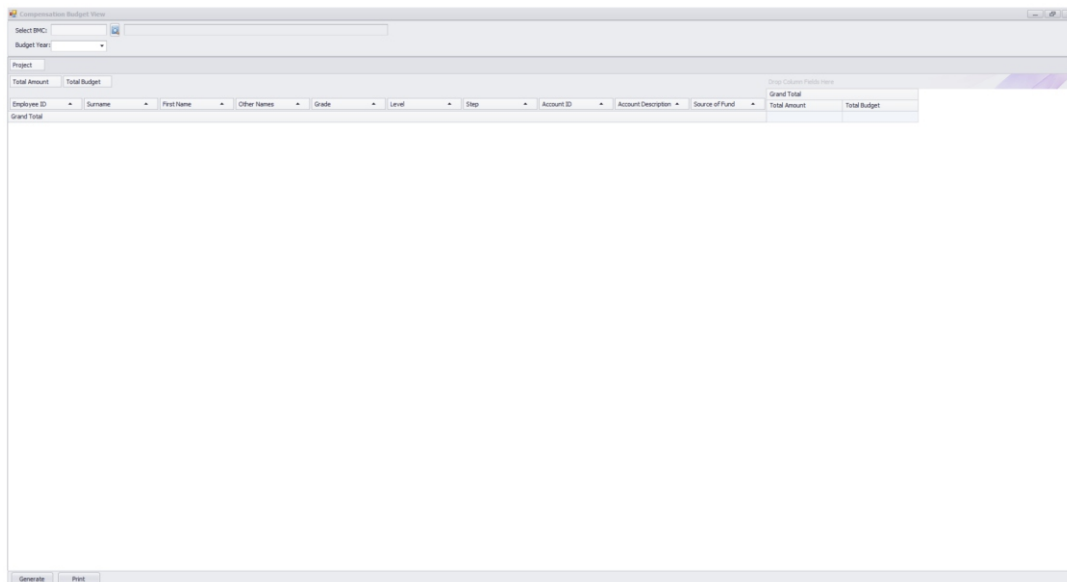
2. Click on the Retrieve button to retrieve the recruitment details
3. Click on the Process button to sync the data

Compensation Reporting

1.1.24 Budget Transactional Report

To Print the Budget Transactional Report, follow the instructions below:

1. Click on Budget Transaction Report to open the Form



2. Select the Budget Year
3. Click on Generate to preview the data

Compensation Budget View

Select BMC: 02N020 0008 Policy Planning, Monitoring and Evaluation Division

Budget Year: 2020

Project

Total Amount Total Budget

Drop Column Fields Here

Employee ID	Surname	First Name	Other Names	Grade	Level	Step	Account ID	Account Description	Source of Fund	Grand Total	Total Amount	Total Budget
104833	Bemphah	Ben Smith Owusu		Deputy Director	23H	4	2110001	Established Post	GOG-Compensation	89,217.60	89,217.60	2404.8
10587	Ananeh	Divine	K	Senior Biostatistician	18L	5	2110001	Established Post	GOG-Compensation	31,100.64	31,100.64	2591.72
111848	Boakye	Kwabena Boateng		Specialist	24L	4	2110001	Established Post	GOG-Compensation	37,838.48	37,838.48	3153.29
119538	Alaieye	Rabatu		Administrative Manager	19H	1	2110001	Established Post	GOG-Compensation	25,836.72	25,836.72	2153.06
1196493	Mansah	Edith	Akoma	Administrative Manager	19H	1	2110001	Established Post	GOG-Compensation	25,836.72	25,836.72	2153.06
							2112203	Car Maintenance...	GOG-Compensation	14,400.00	14,400.00	1200
										40,236.72	40,236.72	3353.06
1196505	Ofon-Adu	Paulina	Afia	Health Planner	19H	1	2110001	Established Post	GOG-Compensation	25,836.72	25,836.72	2153.06
17309	Awoonor-Williams	J	K	Director - GHS Nation...	25L	3	2110001	Established Post	GOG-Compensation	0	0	0
26130	Debotse	Daniel	O	Deputy Chief Health...	23H	1	2110001	Established Post	GOG-Compensation	40,486.2	40,486.2	3337.35
27629	Hammond	Enna		Principal Biostatistician	19H	1	2110001	Established Post	GOG-Compensation	33,835.56	33,835.56	2818.63
36394	Mohammed	Fatma		Senior Administrative...	18L	1	2110001	Established Post	GOG-Compensation	29,072.64	29,072.64	2422.72
46437	Lamprey	Cecilia R		Assistant Chief...	18L	1	2110001	Established Post	GOG-Compensation	25,988.48	25,988.48	2089.04
509275	Ampomah	Freddie		Principal Technical...	17L	5	2110001	Established Post	GOG-Compensation	24,948.44	24,948.44	2054.12
512281	Adjei	Acquah	C	Deputy Director	23H	5	2110001	Established Post	GOG-Compensation	0	0	0
539767	Ninako	Belinda	A	Specialist	24L	3	2110001	Established Post	GOG-Compensation	37,206.96	37,206.96	3100.58
56531	Babarawo	Felicia		Senior Nursing Officer	19L	1	2110001	Established Post	GOG-Compensation	35,895.20	35,895.20	2974.6
568570	Larbi-Obeng	Patrick		Senior Public Health...	19L	1	2110001	Established Post	GOG-Compensation	32,892.84	32,892.84	2741.07
58038	Odankor	Joyce Koror		Senior Executive	18L	5	2110001	Established Post	GOG-Compensation	21,022.44	21,022.44	1751.87
599977	Azumah	Dickson	K	Principal Driver	11L	1	2110001	Established Post	GOG-Compensation	12,257.76	12,257.76	1021.48
600057	Adalaye	Doris		Principal Biostatistician	19H	2	2110001	Established Post	GOG-Compensation	34,610.72	34,610.72	2867.36
6155	Attoh	Nicholita	A	Assistant Chief...	18L	5	2110001	Established Post	GOG-Compensation	35,088.56	35,088.56	2924.88
63084	Ampofo Kus	Sophia Kaseva		Principal Health Planner	19H	5	2110001	Established Post	GOG-Compensation	36,195.72	36,195.72	3016.31
66110	Effah Afari	Esther		Senior Administrative...	18L	1	2110001	Established Post	GOG-Compensation	29,072.64	29,072.64	2422.72
666631	Adu	Georgette	Kwame	Senior Technical...	18L	5	2110001	Established Post	GOG-Compensation	28,670.64	28,670.64	2389.22
690466	Danoo	Anthony	Boadi	Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16	26,801.16	2233.43
691768	Gbebie	Leslie	Tetteh	Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16	26,801.16	2233.43
706952	Aghelo	Winnard Kwaku		Senior Statistician	18L	2	2110001	Established Post	GOG-Compensation	29,966.92	29,966.92	2463.91
769062	Abror	Philip	Kwesi	Senior Nursing Officer	19L	5	2110001	Established Post	GOG-Compensation	38,185.08	38,185.08	3182.09
800594	Akwamoh	Thomas		Senior Statistician	18L	1	2110001	Established Post	GOG-Compensation	29,072.64	29,072.64	2422.72
814729	Boah	Kingley		Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16	26,801.16	2233.43
814737	Makye	James		Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16	26,801.16	2233.43
832885	Ayi	Abu		Senior Statistician	18L	1	2110001	Established Post	GOG-Compensation	29,072.64	29,072.64	2422.72
832900	Nartey	Abraham	Teye	Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16	26,801.16	2233.43
832906	Kumi	Patience		Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16	26,801.16	2233.43
836155	Tetteh-Abley	Bridget		Senior Biostatistician...	18L	1	2110001	Established Post	GOG-Compensation	29,072.64	29,072.64	2422.72
837341	Aniekuda	Eli	Nsamenang	Senior Administrative...	18L	1	2110001	Established Post	GOG-Compensation	29,072.64	29,072.64	2422.72
838689	Abramam	Dominic		Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16	26,801.16	2233.43
8687	Ofosu	Anthony	A	Senior Specialist	24H	5	2110001	Established Post	GOG-Compensation	40,478.88	40,478.88	3373.24
924960	Zakariah	Pandey	M	Health Planner	19H	5	2110001	Established Post	GOG-Compensation	27,309	27,309	2283.25
96484	Kantor	Kassaye Emmanuel		Chief Health Planner	23H	1	2110001	Established Post	GOG-Compensation	458,333.04	458,333.04	3819.17

Generate Print

4. Click on the Print button to print preview and print

Preview

File View Background

100%

GHANA HEALTH SERVICE

EMPLOYEE COMPENSATION BUDGET REPORT

Policy Planning, Monitoring and Evaluation Division

Employee ID	Surname	First Name	Other Names	Grade	Level	Step	Account ID	Account Description	Source of Fund	Total Amount
104833	Bemphah	Ben Smith Owusu		Deputy Director	23H	4	2110001	Established Post	GOG-Compensation	89,217.60
10587	Ananeh	Divine	K	Senior Biostatistician	18L	5	2110001	Established Post	GOG-Compensation	31,100.64
111848	Boakye	Kwabena Boateng		Specialist	24L	4	2110001	Established Post	GOG-Compensation	37,838.48
119538	Alaieye	Rabatu		Administrative Manager	19H	1	2110001	Established Post	GOG-Compensation	25,836.72
1196493	Mansah	Edith	Akoma	Administrative Manager	19H	1	2110001	Established Post	GOG-Compensation	25,836.72
							2112203	Car Maintenance...	GOG-Compensation	14,400.00
										40,236.72
1196505	Ofon-Adu	Paulina	Afia	Health Planner	19H	1	2110001	Established Post	GOG-Compensation	25,836.72
17309	Awoonor-Williams	J	K	Director - GHS Nation...	25L	3	2110001	Established Post	GOG-Compensation	0.00
26130	Debotse	Daniel	O	Deputy Chief Health...	23H	1	2110001	Established Post	GOG-Compensation	40,486.20
27629	Hammond	Enna		Principal Biostatistician	19H	1	2110001	Established Post	GOG-Compensation	33,835.56
36394	Mohammed	Fatma		Senior Administrative...	18L	1	2110001	Established Post	GOG-Compensation	29,072.64
46437	Lamprey	Cecilia R		Assistant Chief...	18L	1	2110001	Established Post	GOG-Compensation	25,988.48
509275	Ampomah	Freddie		Principal Technical...	17L	5	2110001	Established Post	GOG-Compensation	24,948.44
512281	Adjei	Acquah	C	Deputy Director	23H	5	2110001	Established Post	GOG-Compensation	0.00
539767	Ninako	Belinda	A	Specialist	24L	3	2110001	Established Post	GOG-Compensation	37,206.96
56531	Babarawo	Felicia		Senior Nursing Officer	19L	1	2110001	Established Post	GOG-Compensation	35,895.20
568570	Larbi-Obeng	Patrick		Senior Public Health...	19L	1	2110001	Established Post	GOG-Compensation	32,892.84
599977	Azumah	Dickson	K	Principal Driver	11L	1	2110001	Established Post	GOG-Compensation	12,257.76
600057	Adalaye	Doris		Principal Biostatistician	19H	2	2110001	Established Post	GOG-Compensation	34,610.72
6155	Attoh	Nicholita	A	Assistant Chief...	18L	5	2110001	Established Post	GOG-Compensation	35,088.56
63084	Ampofo Kus	Sophia Kaseva		Principal Health Planner	19H	5	2110001	Established Post	GOG-Compensation	36,195.72
66110	Effah Afari	Esther		Senior Administrative...	18L	1	2110001	Established Post	GOG-Compensation	29,072.64
666631	Adu	Georgette	Kwame	Senior Technical...	18L	5	2110001	Established Post	GOG-Compensation	28,670.64
690466	Danoo	Anthony	Boadi	Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16
691768	Gbebie	Leslie	Tetteh	Senior Technical...	18L	1	2110001	Established Post	GOG-Compensation	26,801.16

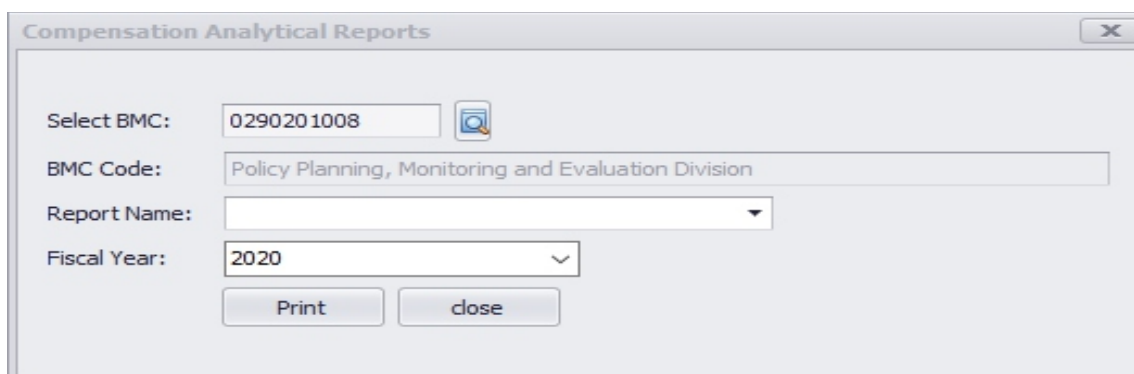
GHANA HEALTH SERVICE

Page 1 of 2

1.1.25 Analytical Report

To print the Analytical Reports, follow the instructions below:

1. Click on Analytical Report to open the Form



Compensation Analytical Reports

Select BMC: 029020 1008

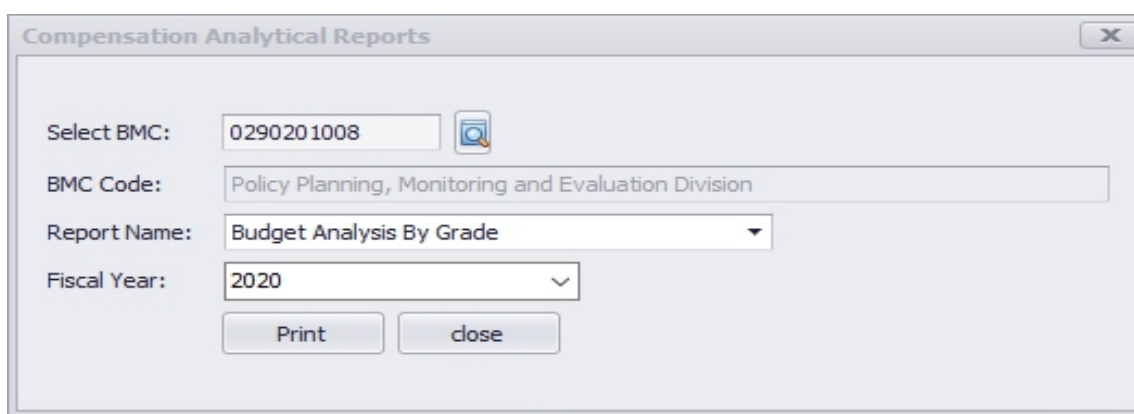
BMC Code: Policy Planning, Monitoring and Evaluation Division

Report Name: [dropdown]

Fiscal Year: 2020

Print close

2. Select the Report Name (that is the Report to print and Budget Year)



Compensation Analytical Reports

Select BMC: 029020 1008

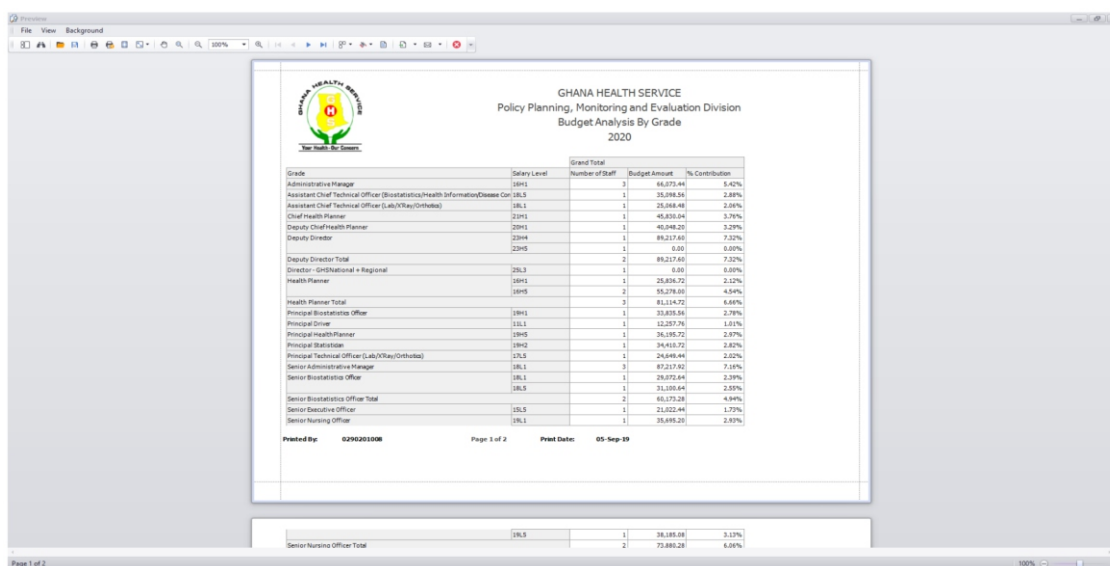
BMC Code: Policy Planning, Monitoring and Evaluation Division

Report Name: Budget Analysis By Grade

Fiscal Year: 2020

Print close

3. Click Print to print preview and print



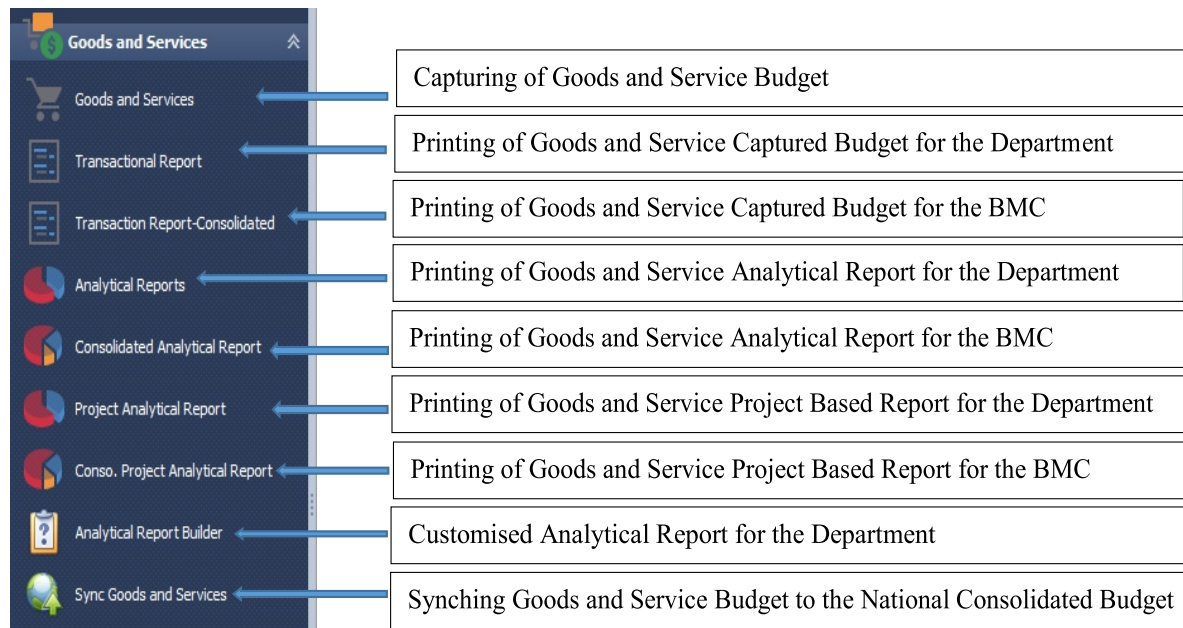
GHANA HEALTH SERVICE
Policy Planning, Monitoring and Evaluation Division
Budget Analysis By Grade
2020

Grade	Salary Level	Number of Staff	Budget Amount	% Contribution
Administrative Manager	18P1	3	66,273.44	5.42%
Assistant Chief Technical Officer (Biostatistics/Health Information/Disease Control)	18L5	1	35,298.56	2.88%
Assistant Chief Technical Officer (Subsidiary/Orthodontics)	18L1	1	25,988.48	2.09%
Chief Health Planner	22P1	1	45,833.04	3.76%
Deputy Chief Health Planner	22P1	1	45,048.20	3.67%
Deputy Director	22P4	1	89,217.60	7.22%
Deputy Director	22P5	1	6.00	0.00%
Deputy Director Total		2	89,217.60	7.22%
Director - Constitutional & Regional	26L3	1	6.00	0.00%
Health Planner	18P1	1	25,836.72	2.12%
Health Planner	18P5	2	55,278.00	4.54%
Health Planner Total		3	81,114.72	6.66%
Principal Biostatistics Officer	18P1	1	33,835.54	2.78%
Principal Driver	15L1	1	12,257.76	1.01%
Principal Health Planner	18P5	1	34,185.72	2.79%
Principal Statistician	18P2	1	34,416.72	2.82%
Principal Technical Officer (Subsidiary/Orthodontics)	17L5	1	24,648.44	2.02%
Senior Administrative Manager	18L1	3	87,217.60	7.18%
Senior Biostatistics Officer	18L1	1	29,672.64	2.39%
Senior Biostatistics Officer Total	18L5	1	31,108.04	2.55%
Senior Biostatistics Officer	18L1	2	68,175.28	5.59%
Senior Executive Officer	15L5	1	21,622.44	1.77%
Senior Nursing Officer	18L1	1	35,689.20	2.91%

Printed By: 0290201008 Page 1 of 2 Print Date: 05-Sep-19

Senior Nursing Officer Total	18L5	1	38,185.56	3.12%
		2	73,869.20	6.06%

GOODS AND SERVICES BUDGETING



How to add a Budget line

1. Click on Goods and Services under Goods and Services sub-module to open the Goods and Services Form

The screenshot shows the 'Goods and Service Budget' form. Numbered callouts indicate the following elements:

- 2**: Points to the 'Add' (+) icon next to the 'Sub-program' field.
- 3**: Points to the 'Add' (+) icon next to the 'Planned Activity' field.
- 4**: Points to the 'Add' (+) icon next to the 'Source of Funds' field.
- 5**: Points to the 'Add' (+) icon next to the 'Intervention Package' field.

The form includes fields for Budget Header (Select BMC, Budget Year, Budget ID, Project, Planned Activity, Activity Type, Act. Frequency, Act. Prioritization, Budget Amount, HSMIDP Objective, National Operations) and Budget Details (Item Type, Item No., Item Description, Unit of Measure, Unit Cost/Rate, Quantity, No. of Days, Activity Frequency, Budget Amount, GFMS Nat. Account).

	Revenue	Budget	Balance
IGF Pharm:	1788.9	2800	1011.1
IGF Services:	1700	12500	10800
GOG Services:	20250.00	4300	15950
SBS Services:	0.00	0.00	0
Program:	87200	87200	0
Unknown Funds:	0.00	12000	12000

2. Click on the icon (+) to add a new Budget

3. Click on the finder to select the Appropriate Project for the Activity (e.g. CHPS+)
4. Enter the Planned Activity (e.g. Conduct a community durbar)
5. Click on the finder to select the Source of Fund
6. Click on the drop-down to select the Activity Type
7. Enter the output (e.g. community durbar conducted)
8. Enter the Frequency
9. Click on the arrow to select the Activity Prioritization
10. Enter the Budget Justification
11. Click on the finder to select the GHS Core Intervention.
12. Under Budget Details

If you select goods

- a. Click on the finder to select the item
- b. Enter the quantity and the number of days

If you select Service

Enter the following:

- a. Item number (e.g. 1,2. etc.)
 - b. Item description (e.g. hiring of the conference venue)
 - c. Unit of measure
 - d. Unit cost/Rate
 - e. Quantity
 - f. Number of Days
13. Click on the finder to select the GIFMIS Nat. Account
 14. Click on the Add button to add the Budget line.
 15. Follow Steps 12 -14 to add a new Item line to the Budget Activity

Editing a Budget Line

1. Click on Goods and Services under Goods and Services sub-module to open the Goods and Services Form
2. Use the Finder  to select the Budget you wish to update
3. At the Budget Details section, click on the Budget Line you want to update in the table and follow steps 12 and 14 of “Adding a New Activity Budget”
4. Click on the Update Button when all changes have been made.

How to Delete a Budget Line

1. Click on Goods and Services under Goods and Services sub-module to open the Goods and Services Form
2. Select the Budget Year
3. Use the Finder  to select the Budget you wish to delete
4. At the Budget Details section, click on the Budget Line you want to update in the table
5. Click on delete.

How to Delete a Budget

1. Click on Goods and Services under Goods and Services sub-module to open the Goods and Services Form
2. Click on the Finder  to select the Budget you wish to delete.
3. At the Budget Details section, click on the Budget Line you want to delete in the table
4. Click on the delete button to delete the Selected Budget Line.
5. Repeat steps 1-4 to delete all Budget Lines.
6. After the last Budget Line has been deleted, you will be prompted if you want to delete the entire budget. Click on Yes if you want to, or click on No.

How to Print Transaction Report

1. Click on Transactional Report under the Goods and Services sub-module
2. On the Form that opens, select the Budget Year
3. Click on the Generate button to preview the report and print out the Transaction Report

How to Print Consolidated Transaction Report

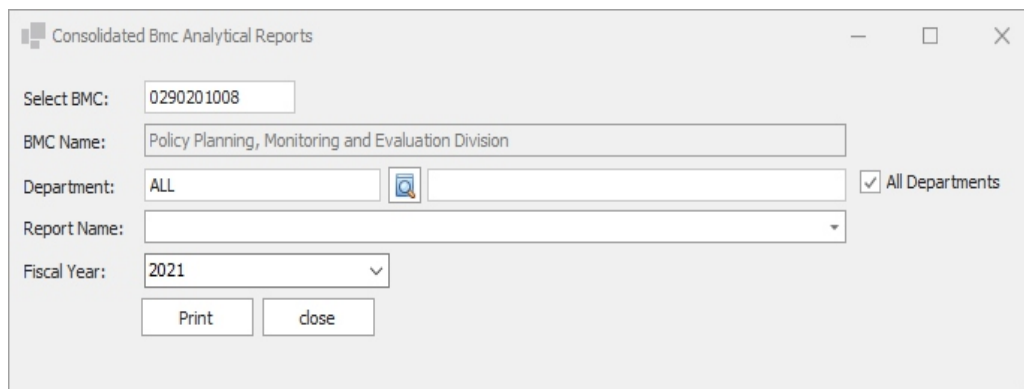
1. Click on Transactional Report-Consolidated under Goods and Services-sub module
2. On the Form that opens, select the Department or click All Department check box to print the report for all Departments
3. Select the Report to print and click on the Print button to preview and print the Report

How to Print Analytical Report

1. Click on Analytical Report under the Goods and Services sub-module
2. On the Form that opens, select the Report Name and the Budget Year (Fiscal Year)
3. Click on the Print button to print the Analytical Report

How to Print Consolidated Analytical Report

1. Click on Consolidated Analytical Report to open the form as shown below



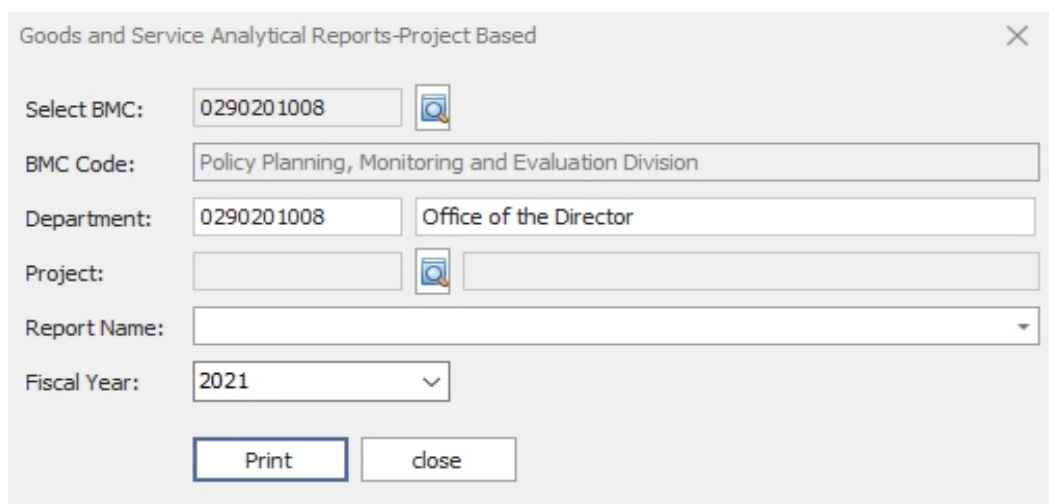
The screenshot shows a window titled "Consolidated BMC Analytical Reports". It contains the following fields and controls:

- Select BMC:** A text box containing "0290201008".
- BMC Name:** A text box containing "Policy Planning, Monitoring and Evaluation Division".
- Department:** A text box containing "ALL" with a magnifying glass icon to its right. To the right of this is a checkbox labeled "All Departments" which is checked.
- Report Name:** A dropdown menu.
- Fiscal Year:** A dropdown menu containing "2021".
- Buttons:** "Print" and "close" buttons at the bottom.

2. To print the Report for all Departments under a BMC, click on the All Departments checkbox or use the finder icon for Department to search for a Department
3. Select the Report to print using the Report Name section
4. Select the Fiscal Year (Budget Year)
5. Click on the Print button to preview and print the report.

How to Print Project Analytical Report

1. Click on Project Analytical Report to open the Project Analytical form as shown below



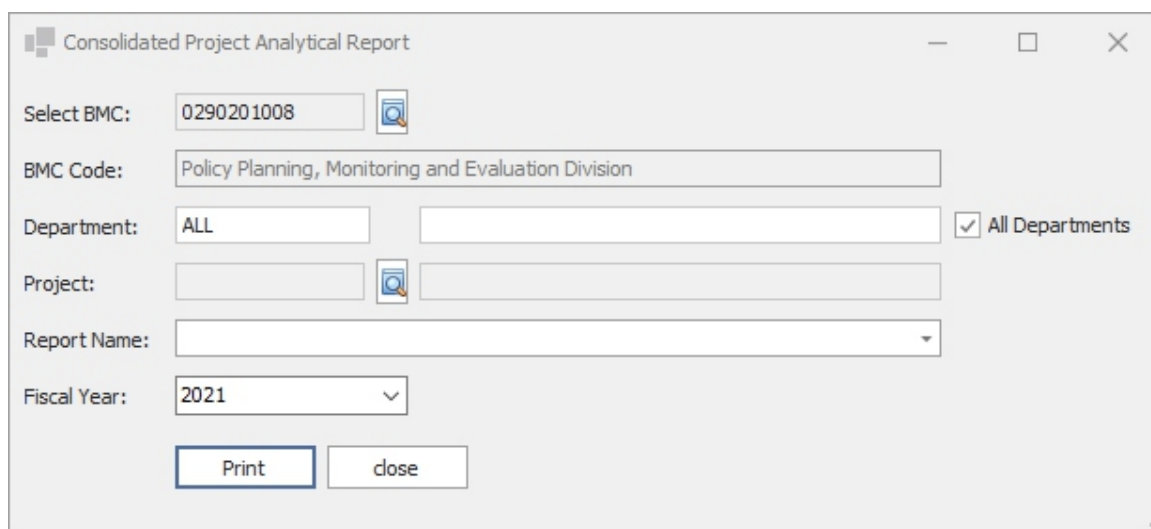
The screenshot shows a window titled "Goods and Service Analytical Reports-Project Based". It contains the following fields and controls:

- Select BMC:** A text box containing "0290201008" with a magnifying glass icon to its right.
- BMC Code:** A text box containing "Policy Planning, Monitoring and Evaluation Division".
- Department:** Two text boxes, the first containing "0290201008" and the second containing "Office of the Director".
- Project:** A text box with a magnifying glass icon to its right.
- Report Name:** A dropdown menu.
- Fiscal Year:** A dropdown menu containing "2021".
- Buttons:** "Print" and "close" buttons at the bottom.

2. Select the Project by using the finder icon
3. Select the Report name, fiscal year (Budget Year), and click on the Print button to preview and print.

How to Print Project Analytical Consolidated Report

1. Click on “Conso. Project Analytical Report” to open the form as shown below

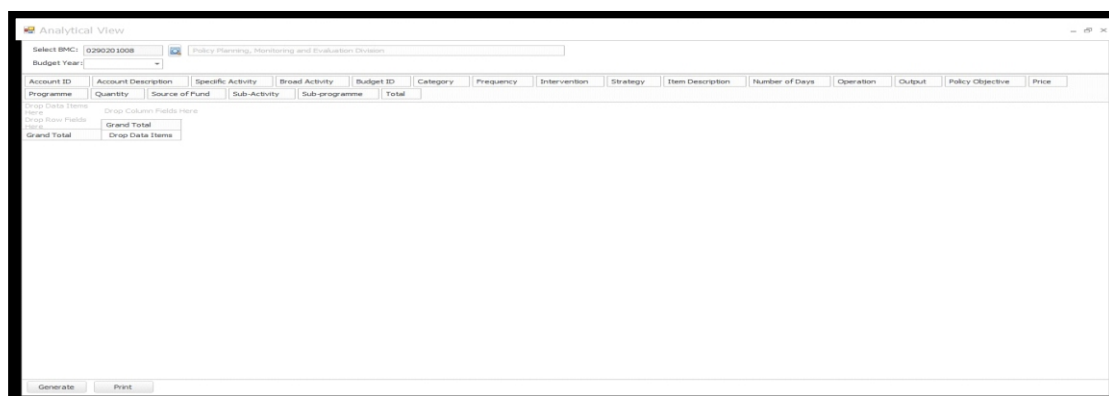


The screenshot shows a web form titled "Consolidated Project Analytical Report". It contains several input fields and buttons. The "Select BMC:" field has the value "0290201008" and a finder icon. The "BMC Code:" field has the value "Policy Planning, Monitoring and Evaluation Division". The "Department:" field has the value "ALL" and a checkbox labeled "All Departments" which is checked. The "Project:" field has a finder icon. The "Report Name:" field is a dropdown menu. The "Fiscal Year:" field has the value "2021" and a dropdown arrow. At the bottom, there are two buttons: "Print" and "close".

2. Select the Department to print for a specific Department using the finder icon or click on the “All Department” checkbox to print for all Department
3. Select the Project to print
4. Select the Report name, Fiscal Year (Budget year), and click on the print button to preview and print.

How to use the Analytical Report Builder

The Analytical Report builder (figure 7) is used to generate Goods and Services Budget report based on information available. The Analytical Report Builder is shown below:



The screenshot shows the "Analytical View" interface. It features a header with "Select BMC:" (0290201008) and "Policy Planning, Monitoring and Evaluation Division". Below this is a "Budget Year:" dropdown. A table with various columns is displayed, including "Account ID", "Account Description", "Specific Activity", "Broad Activity", "Budget ID", "Category", "Frequency", "Intervention", "Strategy", "Item Description", "Number of Days", "Operation", "Output", "Policy Objective", and "Price". The table has a "Grand Total" row at the bottom. At the bottom of the interface, there are "Generate" and "Print" buttons.

Figure 7: Analytical Report Builder

1.1.26 Analysing Reports

CASE STUDY 1 - One Parameter Intervention Budget Analysis

Analyzing with one Parameter Intervention Budget Analysis.

1. Drag the Intervention Field to the Data Field Area and Total Field under the Grand Total as shown in the diagram below:

Account ID	Account Description	Specific Activity	Broad Activity	Budget ID	Category	Frequency	Strategy	Item Description	Number of Days	Operation	Output	Policy Objective	Price	Programme
Quantity	Source of Fund	Sub-Activity	Sub-programme											
Total	Drop Column Fields Here													
Intervention	Total Total													
Grand Total														

2. Select the Budget Year and click on generate. Your results should look like the one below:

Intervention	Total Total
USAID SUPPORT	94340
QUALITY ASSURANCE	1942266
OTHERS	19281130
INTERGRATED MANAGEMENT OF CHILDHOOD ILLNESS	210000
HEALTH EDUCATION	140000
FINANCIAL MANAGEMENT	2840020
DISTRICT SUPPORT PROGRAM	88640
CHILD HEALTH PROGRAM	8000
Grand Total	24604396

CASE STUDY 2 - Analysing with 2 or more parameters Intervention and Objective Budget Analysis

1. Drag the Policy Objective to the Data Field Area followed by the Intervention Field.
See image below:

Account ID	Account Description	Specific Activity	Broad Activity	Budget ID	Category	Frequency	Strategy	Item Description	Number of Days	Operation	Output	Price	Programme	Quantity
Source of Fund	Sub-Activity	Sub-programme	Total											
Drop Data Items Here														
Drop Column Fields Here														
Policy...	▲	Intervention	▼	Grand Total										
Grand Total				Drop Data Items										

2. Drag the Total Field on to “Drop Data Items” under Grand Total

Account ID	Account Description	Specific Activity	Broad Activity	Budget ID	Category	Frequency	Strategy	Item Description	Number of Days	Operation	Output	Price	Programme	Quantity
Source of Fund	Sub-Activity	Sub-programme	Total											
Drop Data Items Here														
Drop Column Fields Here														
Policy...	▲	Intervention	▼	Total Total										
Grand Total														

3. Select the Budget Year and click on Generate. Your report should look like the image below:

Analytical View

Select BMC: 0290201008

Policy Planning, Monitoring and Evaluation Division

Budget Year: 2018

Account ID

Account Description

Specific Activity

Broad Activity

Budget ID

Category

Frequency

Strategy

Item Description

Number of Days

Operation

Output

Price

Programme

Quantity

Source of Fund

Sub-Activity

Sub-programme

Total

Drop Column Fields Here

Policy...

Intervention

Total Total

1. Ensure sustainable, affordable, equitable, easily accessible healthcare services...

USAID SUPPORT

945340

OTHERS

5322430

INTERGRATED MANAGEMENT OF CHILDHOOD ILLNESS

210000

HEALTH EDUCATION

140000

DISTRICT SUPPORT PROGRAM

88640

CHILD HEALTH PROGRAM

8000

1. Ensure sustainable, affordable, equitable, easily accessible healthcare...

5863390

2. Reduce...

OTHERS

300880

3. Enhance efficiency in governance and...

QUALITY ASSURANCE

1942266

OTHERS

13657840

FINANCIAL MANAGEMENT

2840020

3. Enhance efficiency in governance and management of the health system...

18440126

Grand Total

24604396

Generate

Print

CASE STUDY 3 - Analyzing with 2 or more parameters by comparison Budget Analysis by Intervention.

Intervention by Objective Budget Analysis

1. Drag the Intervention Field to the Data Field Area and the Policy Objective Field to Column Area as shown below:

Account ID	Account Description	Specific Activity	Broad Activity	Budget ID	Category	Frequency	Strategy	Item Description	Number of Days	Operation	Output	Price	Programme	Quantity
Source of Fund	Sub-Activity	Sub-programme	Total											
Drop Data Items Here			Policy Objective ▲											
Intervention ▼			Grand Total											
Grand Total			Drop Data Items											

2. Drag the Total Field on to “Drop Data Items” under Grand Total

The screenshot shows the PBMIS interface with the following fields and sections:

- Account ID**, **Account Description**, **Specific Activity**, **Broad Activity**, **Budget ID**, **Category**, **Frequency**, **Strategy**, **Item Description**, **Number of Days**, **Operation**, **Output**, **Price**, **Programme**, **Quantity**
- Source of Fund**, **Sub-Activity**, **Sub-programme**
- Total** (field being dragged)
- Policy Objective** (dropdown)
- Intervention** (dropdown)
- Grand Total** (field)

3. Select the Budget Year and click on Generate. Your report should look like the image below:

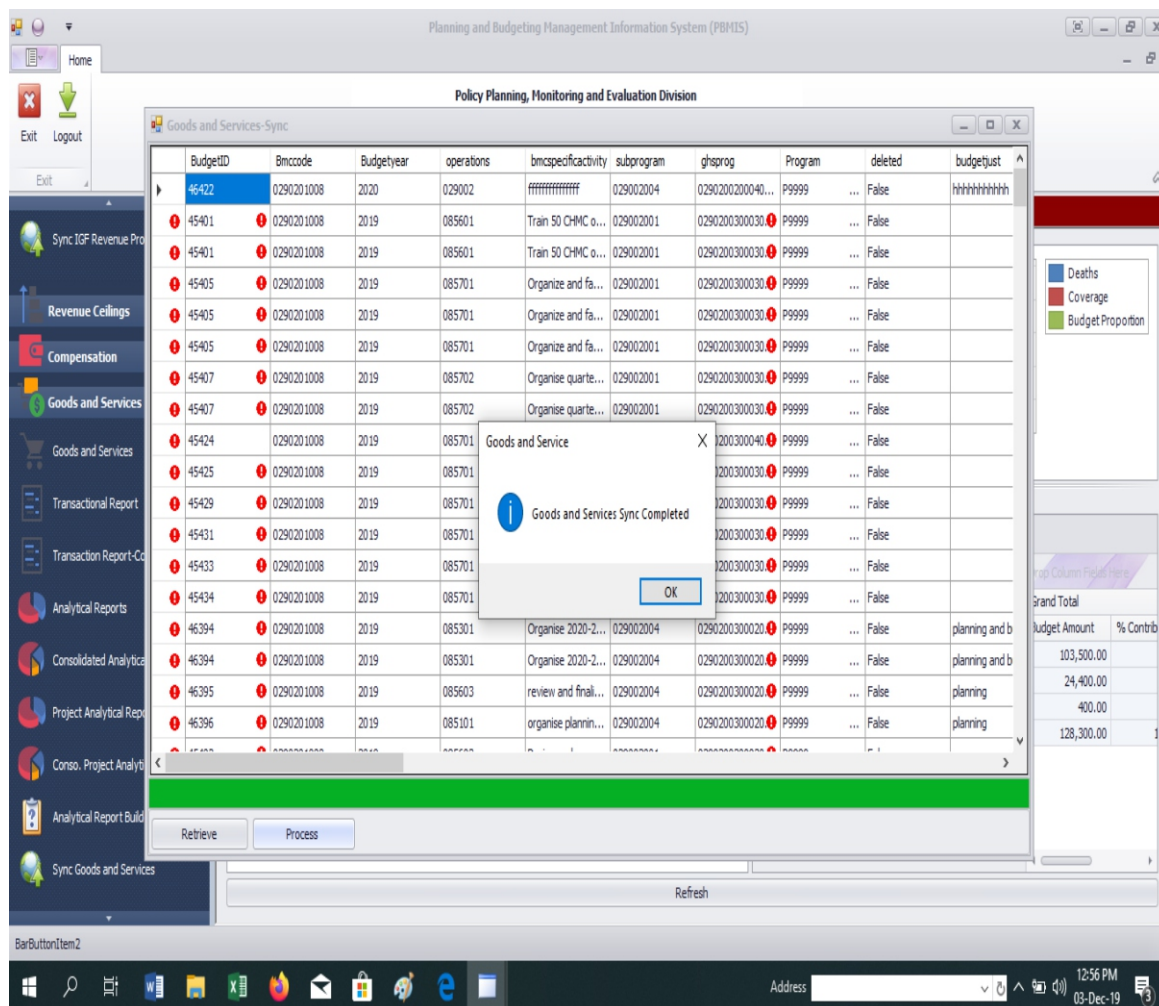
The screenshot shows the PBMIS 'Analytical View' interface with the following fields and sections:

- Select BMC:** 0290201008
- Policy Planning, Monitoring and Evaluation Division**
- Budget Year:** 2018
- Account ID**, **Account Description**, **Specific Activity**, **Broad Activity**, **Budget ID**, **Category**, **Frequency**, **Strategy**, **Item Description**, **Number of Days**, **Operation**, **Output**, **Policy Objective**, **Price**, **Programme**
- Quantity**, **Source of Fund**, **Sub-Activity**, **Sub-programme**
- Total** (field)
- Drop Column Fields Here**
- Intervention** (dropdown)
- Total Total** (field)
- USAID SUPPORT** (94340)
- QUALITY ASSURANCE** (1942266)
- OTHERS** (19281130)
- INTERGRATED MANAGEMENT OF CHILDHOOD ILLNESS** (210000)
- HEALTH EDUCATION** (140000)
- FINANCIAL MANAGEMENT** (2840020)
- DISTRICT SUPPORT PROGRAM** (88640)
- CHILD HEALTH PROGRAM** (8000)
- Grand Total** (24604396)
- Generate** button
- Print** button

How to Sync Goods and Services Budget

Before you sync ensure that you are connected to the internet.

1. Click on Goods and Services dropdown
2. Click on sync Goods and Services
3. Click on the Retrieve button
4. Click the Process button



NB: Login online to confirm the budget upload. Run transactional reports (online and offline) to validate your entries.

ACTIVITY WORK PLAN

Adding a Budget Work Plan

1. Click on Budget Work Plan under Activity Work Plan
2. On the form that opens, select the Budget Year
3. Click on Find icon  beside the Budget ID to select the Budget you want to plan for.
4. Fill in the Responsibility and Collaborators field to show who will be responsible for the Activity and who will collaborate in the same activity.
5. In the Work Plan table, enter the number of times you will have the activity per month at the Frequency field.
6. Click on Add to Add the Activity Work Plan
7. Print the work Plan by clicking on Print.

Note

The Planned Budget Amount should always be equal to the Budget Amount.

The system will not allow you to Add/Update the Work Plan if both amounts are not the same

Updating a Budget Work Plan

1. Click on Budget Work Plan under Activity Work Plan
2. On the form that opens, select the Budget Year
3. Click on Find icon  beside the Budget ID to select the Budget you want to plan for.
4. The System will populate the existing Work Plan to see what you have done previously.
5. Follow steps 4-5 of “Adding a Work Plan” to make necessary changes.
6. Click on the Update button to update the Work Plan when changes are completed.
7. Print the new Work Plan by clicking on the Print button.

Printing a Budget Work Plan Report

1. Click on Work Plan Report under Activity Work Plan to open the Form.
2. On the form that opens, select the Budget Year.
3. Click on Generate to generate Report.
4. Click on print to print the generated report.

Printing Consolidated Work Plan Report

1. Click on Consolidated Work Plan Report to open the form as shown below

Work Plan Report

Select BMC: 0290201008 Policy Planning, Monitoring and Evaluation Division

Department: ☒ All Departments

Budget Year: 2021

Quarter:

Drop Filter Fields Here

BudgetAMT Quarter

Budget ID Planned ... Sub Acti... Collabor... Responsi... Source o... Output Month Grand Total

Grand Total

Generate Print

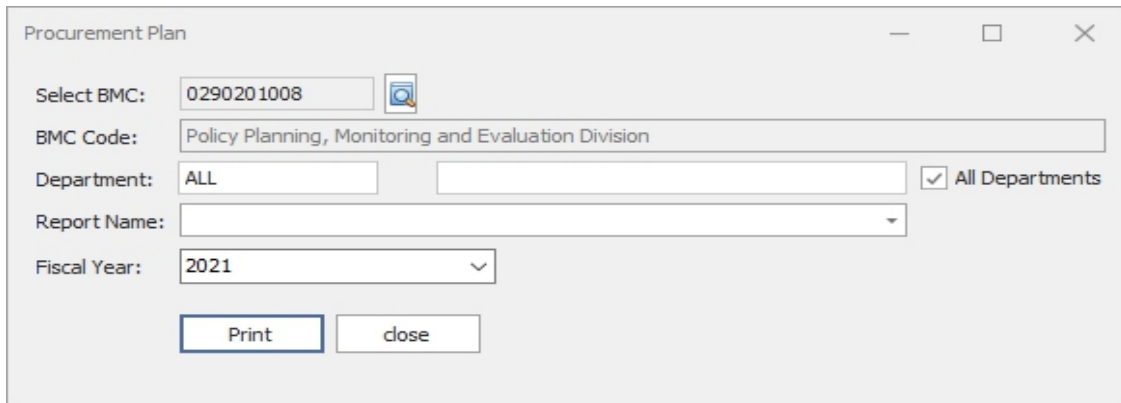
2. Select a Department to print for one department or click on the “All Departments” check box to print for all Departments.
3. Select the Budget Year and the Quarter.
4. Click on Generate to generate the report.
5. Click on the Print button to preview and print the report.

How to Print the Procurement Plan

1. Click on Procurement Plan to open the form.
2. Select the Report name and fiscal year (Budget year).
3. Click on the Print button to preview and print.

How to Print Consolidated Procurement Plan

1. Click on Consolidated Procurement Plan to open the form as shown below:



Procurement Plan

Select BMC: 0290201008

BMC Code: Policy Planning, Monitoring and Evaluation Division

Department: ALL ☒ All Departments

Report Name: ▼

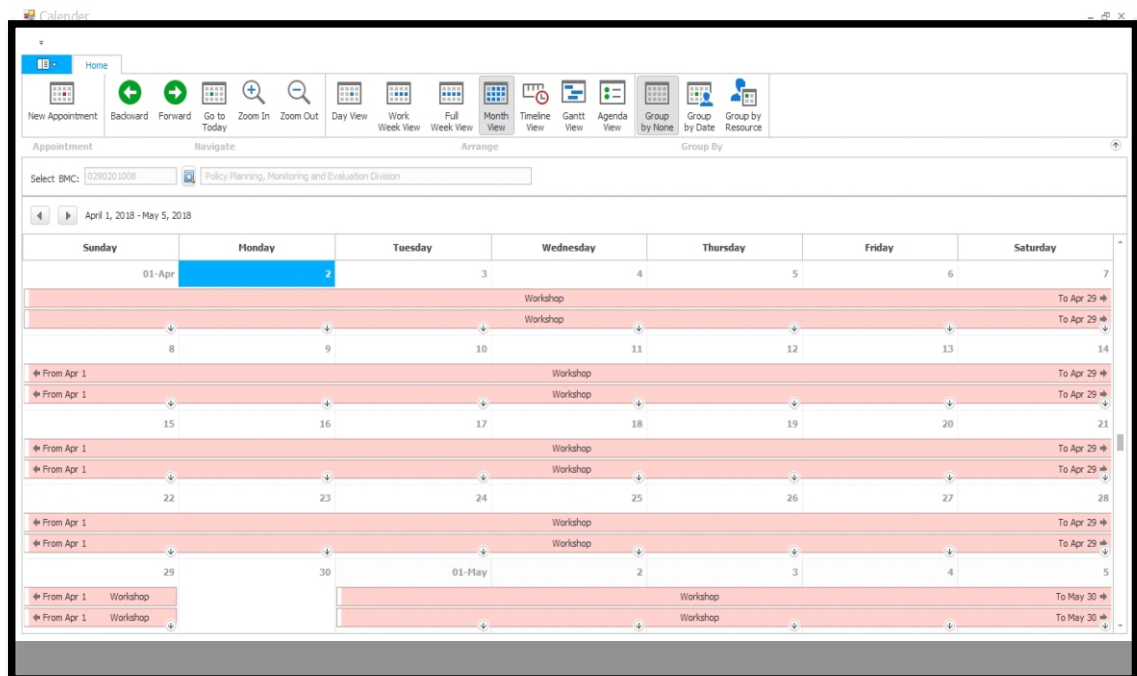
Fiscal Year: 2021

Print close

2. Select a Department to print for one department or click on the “All Departments” check box to print for all Departments.
3. Select the Report Name for the Report to be printed.
4. Click on the Print button to preview and print the report.

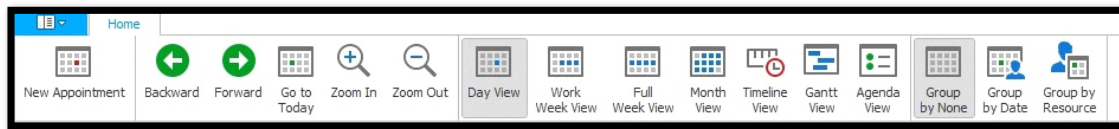
Work Plan Calendar

The Work Plan Calendar is a built-in calendar to track activities that have been planned to use the Budget Work Plan sub-menu. The image below depicts the interface of the Work Plan Calendar.



1.1.27 The Menu Section

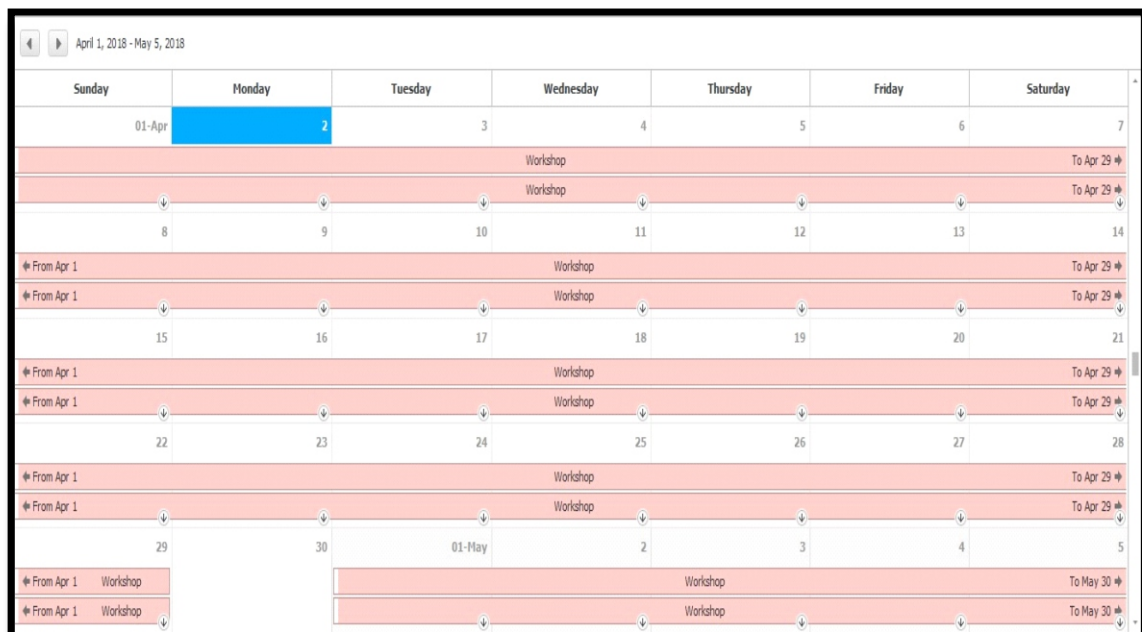
The Menu section of the Work Plan Calendar per the image below is used to alternate how you wish to see the Calendar:



1.1.28 The Calendar Section

The Calendar section is where your activity appears in the Calendar form.

The image below depicts the Calendar section where your activity is being viewed using the Month View from the Menu Section:



1.1.29. The Detail View

By clicking on anywhere in the coloured section, which is showing the activity time line, the details of the activity pop up in a small window. The image below shows the detailed view when the coloured timeline is clicked:

The screenshot shows a software window titled "Workshop - Event". At the top, there's a toolbar with icons for save, delete, and other actions. Below the toolbar, there's a tab labeled "Appointment". Under the tab, there are two main sections: "Actions" and "Options". The "Actions" section contains "Save And Close" and "Delete" buttons. The "Options" section contains a "Label" dropdown set to "Important" and a "Show time as:" dropdown. Below these, there are input fields for "Subject" (containing "Workshop"), "Location", and "Resource" (set to "(Any)"). There are also date and time pickers for "Start time" (01-Apr-18, 12:00 AM) and "End time" (29-Apr-18, 12:00 AM), along with an "All day event" checkbox. At the bottom, there's a large text area containing the text "National level Bbudget Hearing Workshop: Northern Sector".

How to Sync the Work Plan

1. Click on Sync work plan to open the form.
2. Click on the Retrieve button to retrieve your data.
3. Click on Process to sync your Work Plan.

CAPITAL INVESTMENT

The Capital Expenditure is used to capture all government projects for the BMC.

The Sub-Menu for the Capital Expenditure and their functions are as follows:

1. **Capital Expenditure** – The Data Entry Form to capture all projects and their properties.
2. **Transaction Report** – The Transaction Report is used to print all Projects and their +properties for the Budget Year under review.
3. **Analytical Report** – The Analytical Report is used to print analysis of report for the Capital expenditure.

Expenditure Module

Capex Sync – The Capex Sync is used to Sync the Capital Expenditure Budget to the Consolidated Budget.

Capital Expenditure

How to Add a Capital Expenditure Budget

1. Click on Capital Investment dropdown.
2. Click on Capital Expenditure to open the Capital Expenditure Form.
3. Click on the icon  to start creating a new project.
4. Fill in the required details.
5. Click on the Add button when you are done.

How to Update a Capital Expenditure Budget

1. Click on Capital Investment dropdown.
2. Click on Capital Expenditure to open the Capital Expenditure Form.
3. Click the Finder  to search for the Project.
4. Select the Project you wish to update.
5. Update the necessary fields and click on the Update button to update the Project.

Printing Transactional Report

1. Click on Transactional Report under the Capital Expenditure sub-module to open the Transaction Report Form.
2. Select Budget Year.
3. Click on the Print button to print the report.

Printing Analytical Report

1. Click on Analytical Report under the Capital Expenditure sub-module to open the Analytical Report Form.
2. Select the Report Name and the Budget Year.
3. Click on the Print button to print the report

Synchronizing Capital Expenditure Budget

1. Click on Capex Sync under the Capital Expenditure sub-module to open the Capex Sync Form.
2. Click on the Retrieve button to display any entered Capex Budget for the Budget Year.
3. Click on the Process button to Sync the Data to the consolidated database.

ACTIVITY IMPLEMENTATION

The Activity Implementation is used when you are ready to implement an activity that you have budgeted and planned for. The interface of the Activity Implementation looks like the image below:

The screenshot shows the 'Activity Approval Form' window. At the top, there are input fields for 'BMC Code' (0290201008), 'Requestion ID', 'Budget ID', and 'Date' (18-Jul-18). Below these are fields for 'Sub Activity', 'Work Plan Year', 'Work Plan Period', and 'Work Plan ID'. A table with 13 columns is visible: Account ID, Account Description, Budgeted Rate, Budgeted Quantity, Budgeted Days, Budgeted Total, Revised Rate, Revised Quantity, Revised Days, Revised Total, Variance, Comment/Justification, and Source of Fund. At the bottom right, there are three input fields: 'Budgeted Amount', 'Requested Amount', and 'Undistributed Amount'. At the bottom left, there are three buttons: 'Save', 'Update', and 'Submit Request'.

How to add an activity to be implemented

1. Click Activity Implementation sub-module to open the Activity Implementation Form.
2. Click on the finder  to select the budget line.
3. The Details of the Budget appears.

This screenshot is identical to the one above, showing the 'Activity Approval Form' window with the same fields and table structure.

4. At the Revised Quantity, Revised Days, and Revised Rate fields, key in the newly revised figures if there are any changes and comment or justify the changes.
5. If there are no changes in the figures, click on the Add button to add the Work Plan.
6. Click on Submit Request to finally submit for Approval.

Note: When "submit request" is clicked you cannot make any changes to the activity again.

How to update activity to be implemented

1. Select the Requisition ID by clicking on the finder 
2. The Details of the Budget appears.
3. Make the necessary corrections and click on update to effect it.

How to Print Implementation Report

1. Click on Budget Implementation Report to open the form.
2. On the opened form, select the Budget Year and the Report name.
3. Click on the Print button to preview and print.

CONSOLIDATED REPORTS

Introduction

The PBMIS helps consolidate reports at District, Regional and National Levels.
To Print a Consolidated Report, click on the level of Report as depicted in the image below:



District Reports

1. Click on District Reports to open the District Reports Form.
2. Select the District, Report Name, and Budget Year.
3. Click on the Print button to print the report.

Regional Reports

1. Click on Regional Reports.
2. On the Form that opens, select the Region, Report Name, and Budget Year.
3. Click on the Print button to print the report.

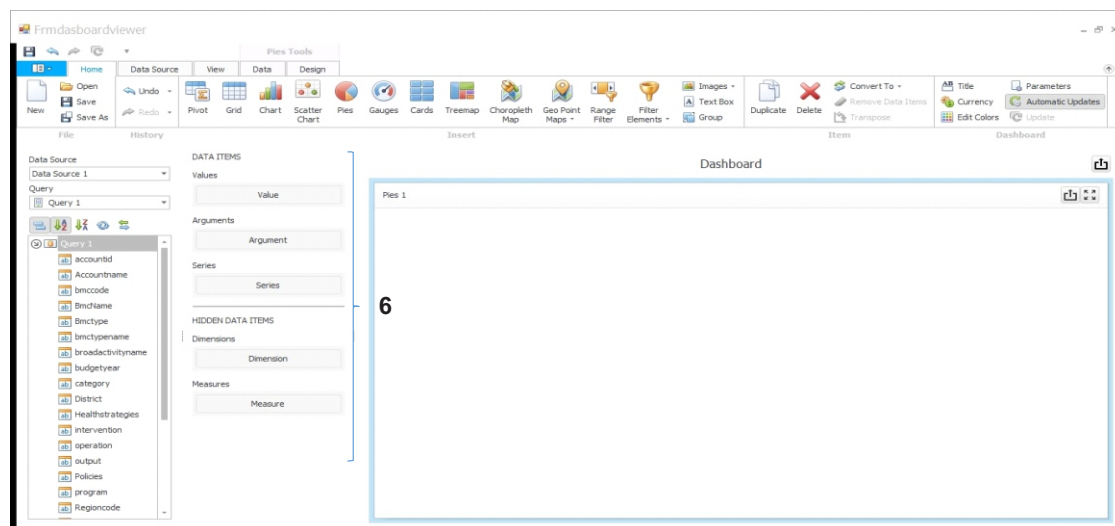
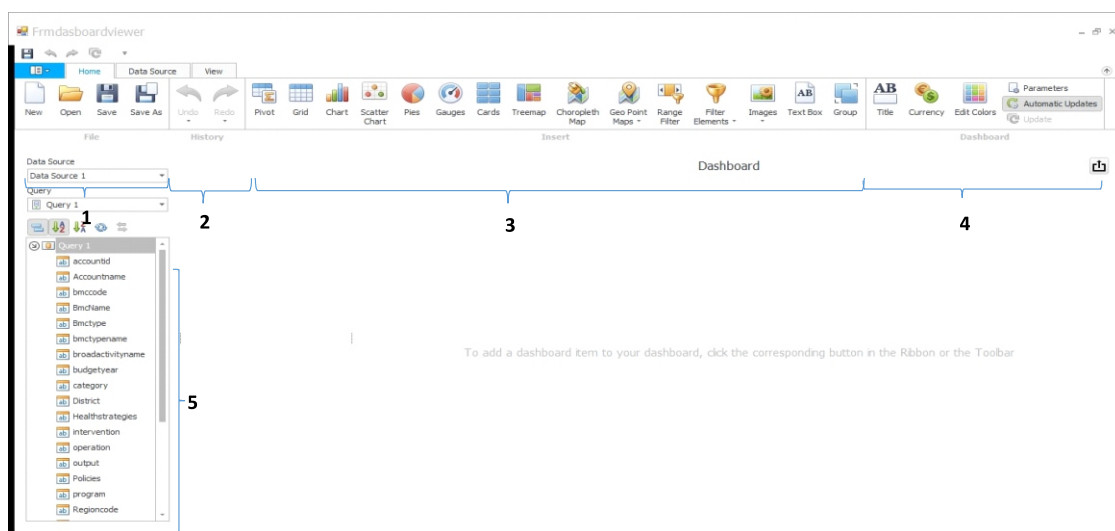
National Report

1. Click on National Reports.
2. On the Form that opens, select Report Name and Budget Year.
3. Click on the Print button to print the report.

Report Builder

Use the Report Builder to design Customized Dashboard and Analytical Reports.

Below is the interface of the Report Builder Form and its parts definitions:



1. File
2. History
3. Insert
4. Dashboard
5. Data Source
6. Data Items

Building A Dashboard or Analytical Report

1. Click on Report Builder under Consolidated Reports
2. The Report Builder Form opens
3. Under the **Insert menu**, click on any of the icons depending on the kind of report you want to build
4. Drag the fields you want to analyze from the “Data Source” section to the “Data Items” section.

Printing BoD, Coverage and Budget Report

1. Click on the PBMIS DHIMS 2 Designer
2. The Report Builder Form Opens
3. Under the Insert menu, click on any of the icons depending on the kind of report you want to build.
4. Drag the fields you want to analyze from the “Data Source” section to the “Data Items” section.