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Memo #24-018

MEMORANDUM

TO: The Agency Addressed

FROM: Chris Spencer, Director *CMS*
Office of Policy and Budget

Tim Sadberry, Staff Director *TS*
Senate Committee on Appropriations

J. Eric Pridgeon, Staff Director *JP*
House Appropriations Committee

SUBJECT: Guidelines for Amending Fiscal Year 2024-25 Agency Legislative Budget Requests

DATE: December 20, 2023

Subsection 216.023(7), Florida Statutes, allows agencies to amend their legislative budget requests (LBRs) after the Governor has submitted his recommended budget to the Legislature. The following information and guidelines are provided for amending the LBRs for Fiscal Year 2024-25.

1. Columns A14, A15 and A16 were created by copying Column A12 to Column A14, Column A04 to Column A15, and Column A05 to A16.
2. Amendments will be input into Column A14 and the corresponding Columns A15 (nonrecurring), and A16 (annualization), must also be completed as appropriate. The display status for these columns was placed on transfer control to allow legislative and Office of Policy and Budget (OPB) analysts to obtain current reports on the agency amended budget.

SPECIAL NOTE: Agencies should add all recurring issues approved by budget amendments after submission of the final LBRs (using 160XXX0 issues) to reduce the number of budget amendments requiring approval again next year. In addition, agencies must continue updating Column A18 for all approved recurring budget amendments (refer to Memo #24-003).

3. All existing issue narrative in Set A1 has been locked to prevent any changes from being made and to preserve the original agency request. Issue Narrative must be added or updated via the LAS/PBS Web.

In the instance where an existing D-3A issue requires a change, there will be two boxes; one titled ‘Existing Narrative (Locked)’ and one titled ‘Append to Existing Narrative.’ Go to the ‘Append to Existing Narrative’ box and enter "Amended 2024-25 Narrative after December 20, 2023", skip down a few blank rows and begin entering the justification for the change. The new narrative may replace all existing narrative or supplement it. The new narrative should conclude with "Summary:" followed by a brief explanation of the change in dollars, positions and/or salary rate. Particular attention should be given to highlighting the change to dollars, positions and/or salary rate on an existing issue to avoid confusion on what was previously requested and the impact of the amended request.

In the instance where the D-3A issue is new, there will only be one narrative box to enter text. New issues which are added to the agency request should follow the same format with the heading "Amended 2024-25 Narrative after December 20, 2023" followed by the narrative justification. The justification should conclude with the statement, "Summary: This is a new issue." In the event an amendment occurs to the new issue, the same process would apply, the heading would be added after the next date, for example, "Second Amended 2024-25 Narrative after [insert date of previous Amended LBR Submittal]."

Note: Upload is available via LAS/PBS Web. See Narrative Upload Instructions for details.

Column Number	Column Title	Description
A12	AGY FNL REQ FY 2024-25	Agency Final Request for FY 2024-25 including technical adjustments (will remain locked)
A14	AGY AMD REQ FY 2024-25	Agency Amended Request for FY 2024-25 after December 20, 2023
A15	AGY AMD N/R FY 2024-25	Agency Amended Nonrecurring Request for FY 2024-25
A16	AGY AMD ANZ FY 2024-25	Incremental amount required to annualize the Agency Amended Request for FY 2024-25

4. Upon completion of input, agencies must run the appropriate audit reports for all changes – use STAM SAVE-ID LBRC / TRAN-ID LBRR or LAS/PBS Web at Reports > Report Requests > Legislative Budget Request > LBRC – Amended LBR Audits (i.e., Schedule I Audit, Negative Appropriation Category Audit, Base Rate Audit, etc.) to verify that the data is in balance.
5. The following documents will need to be submitted for each amended LBR and will be assembled in the following order on the Florida Fiscal Portal:
 - Letter of Transmittal (example attached)
 - Exhibit D-3A – report for **only those issues that have been added or modified**, using Columns A12, A14, A15, A16 and A14 minus A12. Use STAM SAVE-ID ED3R / TRAN-ID EADR or LAS/PBS Web at Reports > Saved Reports (Statewide)
 - Schedule I – **only if amendment has a trust fund impact**, using Columns A12 and A14. Use one of the following Saves:

- For reports at the budget entity level: In LAS/PBS Web, go to Reports > Saved Reports (Statewide) > SCHEDULE I AMD BUDGET or STAM SAVE-ID SC12 / TRAN-ID SC1R
- For reports at the department level: In LAS/PBS Web, go to Reports > Saved Reports (Statewide) > SCHEDULE I AMD BUDGET - DEP or STAM SAVE-ID SC13 / TRAN-ID SC1R

As agencies complete each submission, the documents must be published to and retained separately on the Florida Fiscal Portal. In order for OPB and legislative staff to be made aware of the completion of an amended LBR, agencies will need to notify their respective OPB and legislative analyst via e-mail (in a format of the agency's choosing) to alert them of the completion of an amended LBR. At this time, an amended LBR is considered officially submitted and agencies should refrain from making any changes to any of the submitted documents. If additional amendments are necessary after a submission, agencies will need to submit an additional amended request.

A copy of the instructions on how to publish the amended LBR on the Florida Fiscal Portal is attached.

Further information regarding these guidelines may be obtained by contacting the OPB analyst assigned to your agency.

CS/kt

cc: OPB Policy Coordinators and Analysts
Legislative Appropriations Committee Staff

ATTACHMENTS