

# Operating Budgeting Level 2 – Rollovers

## StrataJazz® Administrator Certification

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# Introductions

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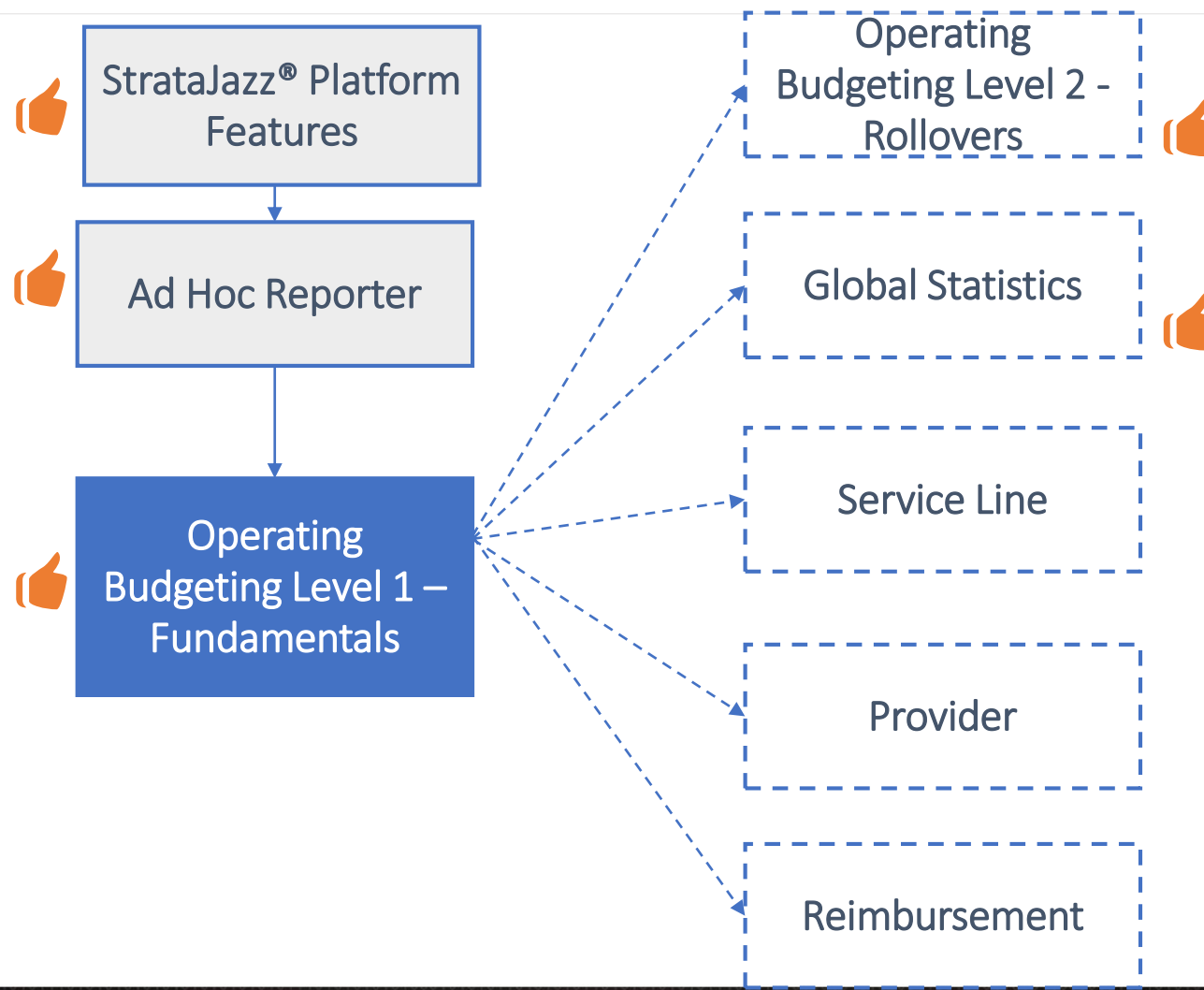
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## Certification Course Objectives

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- Make sure you have the **practical skills, processes, and tools** for optimal ability **to close and roll over** your organization's StrataJazz® Operating Budgeting system
- **Minimize** the occurrences when you must reach out to Strata Decision team members to help with a system change or issue

# Operating Budgeting

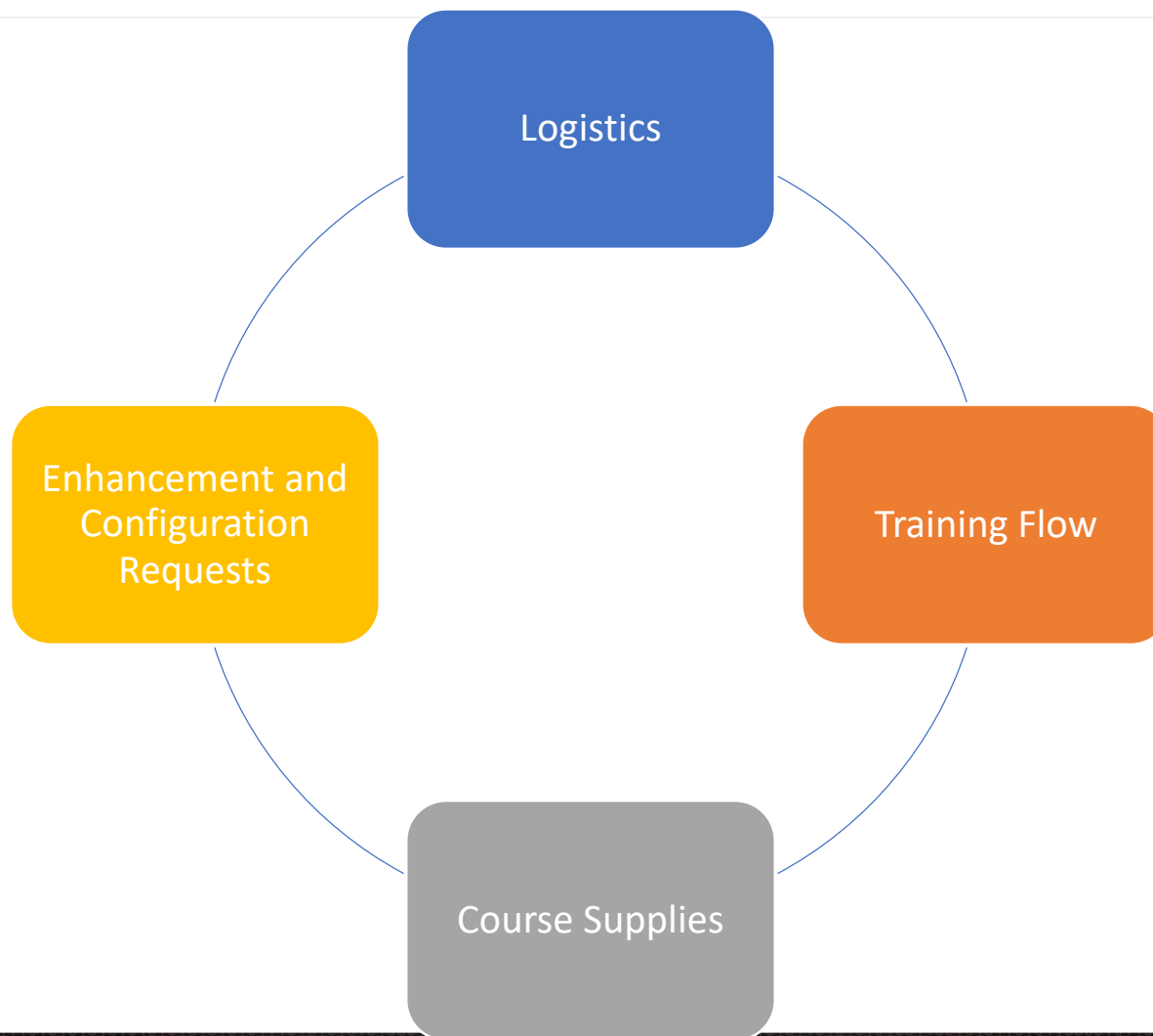




# Agenda

Topics In Order
Budget Close
Managing Your Rollover
Data Updates and Requirements
Operating Budgeting System Rollover
Reminders on Other Maintenance, Testing, and Troubleshooting
Rollovers After Certification

# Housekeeping and Logistics



## Symbols In This Presentation

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 References page in manual that covers the information

 Recommended configuration or process

# Budget Close

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## Budget Close Overview

- Saves off copy of just-finished budget
  - Attachment
  - Historic data
- Prevents budget values from changing
  - Configuration changes
- Previously completed only by Strata Decision team members
- With System Center screens, now renamed to Budget Close
  - Previously “lockdown”

## Budget Close Actions

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- **Locks** the budget models
- **Suspends** all budget models
- **Archives data** from the budget forms
- Creates a data **snapshot**
- **Archives the budget models** and creates an attachment
- **Transfers data to the shared data import tables** based on your selections on the Close Budget page

# Review Prior to Completing Budget Close

Review locked budget models

**Operating Budgeting**

Service Line (2) | Global Statistics (2) | **Departmental Budget (435)** | Reimbursement (3) |  🔍

✔ Select 🔄 Refresh ✎ Edit Budget 📄 Edit Budget in Excel 📄 Routing Slip 📄 Report 📄 Export ▶ Pull ABB Budget into Baseline ⚙ Tools 🔄 Refresh Model

	Name ^	Step	Budget Status	Manager	Director	Vice President	Variable FTEs - Budget Yr	Fixed FTEs - Budget Yr
1	*10-03210 - CF - Med-Surg - 2	🔒 Initialize	Draft	Manager, Med-Surg	Director, Cape Ferdinand	Vice President, NVRH	1.00	5.00
2	*PHYS - 70780 - Surgery Clinic	🔒 Initialize	Draft	Sykes, Vicki	Curtis, Andrea	Nelson, Kerri	0.00	4.00
3	10-02382 - Emergency Nurse Provider Course 14-15	🔒 Initialize	Draft	Malte, Veronica	Curtis, Andrea	Normal, Abbey	0.00	0.00



*Prior to Completing Budget Close section (in Budget Close chapter)*



# Logging In

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Log in using the instructions on your database assignments handout.

# Reviewing Locked Budget Models

## Demonstration and Hands-On

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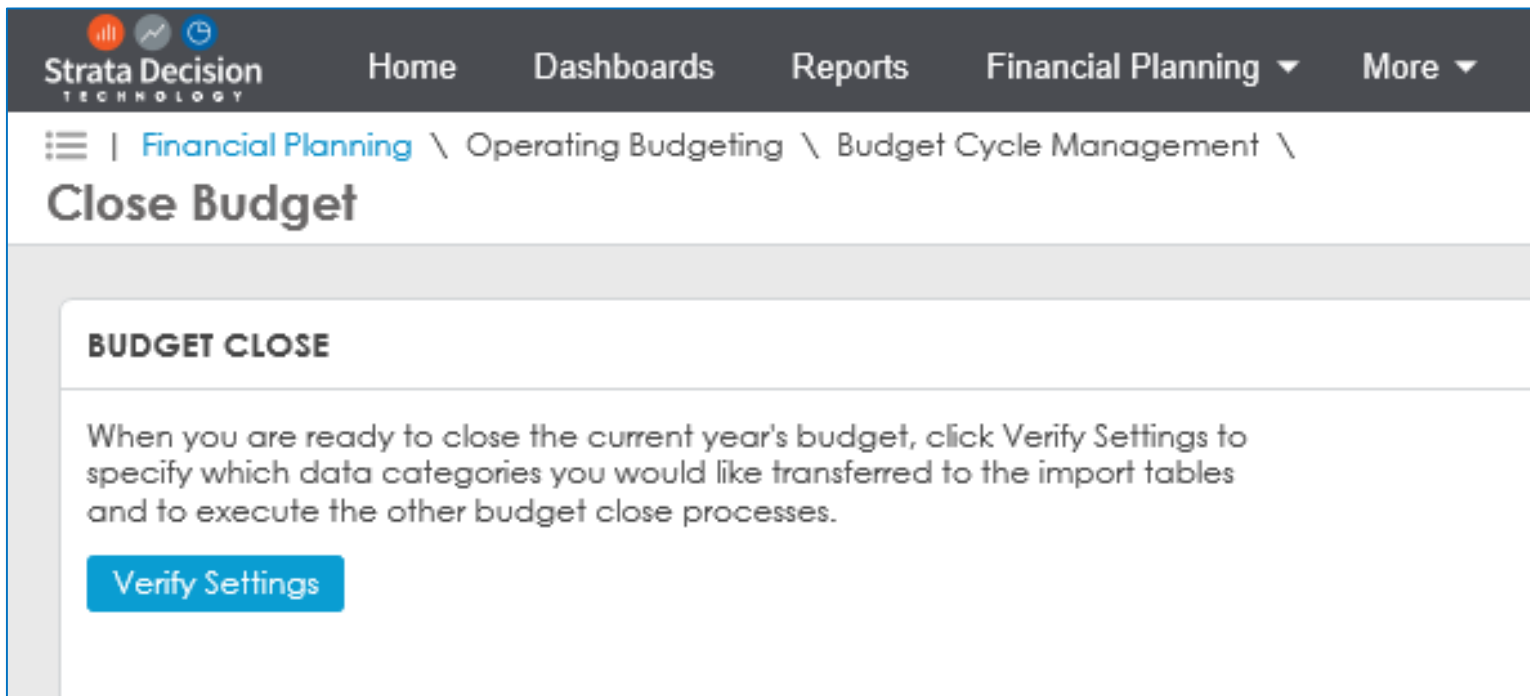
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# Budget Close

## System Center > Financial Planning > Operating Budgeting > Budget Cycle Management > Close Budget



Strata Decision TECHNOLOGY Home Dashboards Reports Financial Planning More

Financial Planning \ Operating Budgeting \ Budget Cycle Management \

### Close Budget

#### BUDGET CLOSE

When you are ready to close the current year's budget, click Verify Settings to specify which data categories you would like transferred to the import tables and to execute the other budget close processes.

[Verify Settings](#)



Completing Budget Close section (in Budget Close chapter)



# Budget Close

## Demonstration and Hands-On

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# Close Budget Progress

Strata Decision TECHNOLOGY | Home | Dashboards | Reports | Financial Planning | Decision Support | Continuous Improvement | more | SDT - Strata

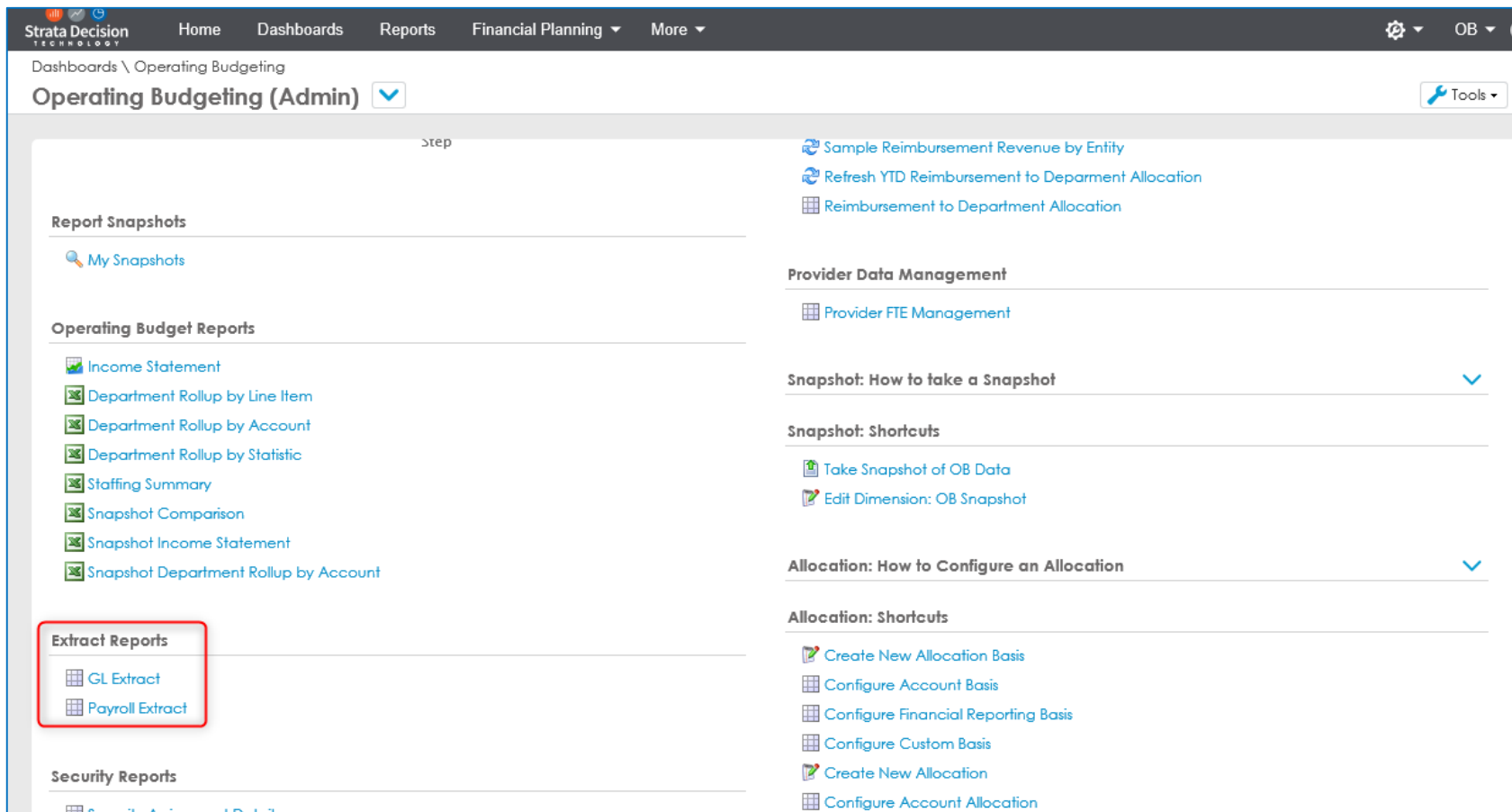
Financial Planning \ Operating Budgeting \ Budget Cycle Management \

## Close Budget

BUDGET CLOSE STATUS		
Step		Status
1	Lock Budget Models	5/31/2017 1:49 pm
2	Suspend Budget Models	5/31/2017 1:49 pm
3	Archive Form Data	5/31/2017 1:49 pm
4	Create Data Snapshot	5/31/2017 2:00 pm
5	Archive Budget Models	5/31/2017 2:01 pm <span>445 of 445 complete</span>
6	Transfer General Ledger Data	5/31/2017 2:43 pm
7	Transfer Payroll Data	5/31/2017 2:44 pm
8	Transfer Provider Data	5/31/2017 2:44 pm
9	Transfer Service Line Volumes Data	5/31/2017 2:44 pm
10	Transfer Charge Code Data	5/31/2017 2:44 pm

# Extracting the Budget

## Dashboards > Operating Budgeting > Operating Budgeting (Admin)



The screenshot shows the Strata Decision Operating Budgeting (Admin) dashboard. The navigation bar includes Home, Dashboards, Reports, Financial Planning, and More. The main content area is divided into several sections:

- Report Snapshots**: Includes a search icon and 'My Snapshots'.
- Operating Budget Reports**: Lists various reports such as Income Statement, Department Rollup by Line Item, Department Rollup by Account, Department Rollup by Statistic, Staffing Summary, Snapshot Comparison, Snapshot Income Statement, and Snapshot Department Rollup by Account.
- Extract Reports**: A section highlighted with a red box, containing 'GL Extract' and 'Payroll Extract'.
- Security Reports**: Located at the bottom of the left column.
- Sample Reimbursement Revenue by Entity**: A link to view sample data.
- Refresh YTD Reimbursement to Department Allocation**: A link to refresh data.
- Reimbursement to Department Allocation**: A link to view allocation data.
- Provider Data Management**: Includes 'Provider FTE Management'.
- Snapshot: How to take a Snapshot**: A dropdown menu.
- Snapshot: Shortcuts**: Includes 'Take Snapshot of OB Data' and 'Edit Dimension: OB Snapshot'.
- Allocation: How to Configure an Allocation**: A dropdown menu.
- Allocation: Shortcuts**: Includes 'Create New Allocation Basis', 'Configure Account Basis', 'Configure Financial Reporting Basis', 'Configure Custom Basis', 'Create New Allocation', and 'Configure Account Allocation'.



## Preparing for Budget Closure Recommendations

- If budget adjusted offline, make adjustments in StrataJazz® prior to close
  - Can avoid separate data import
- Make sure all data you will use as part of close process is final in StrataJazz®
  - Can only run the process on this screen once
  - Cannot be undone
- Work with Strata Decision to make sure default pay code is configured on the pay code groups for payroll data
- If Verify Settings button not showing in Close Budget screen, means budget is already currently closed

## Monitoring Closure Status Recommendations

- After kicking Close Budget off, come back screen later in day to make sure process finished successfully
  - If failures, work with Strata Decision Technical Consulting

# Scoping and Managing the Rollover Process

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## Scoping and Managing Your Rollover Process

- Non-system work required to ensure rollover remains on track
- Largest effort of rolling the system over
- Instructions for using work plan in manual



*In Scoping and Managing the Rollover Process chapter of manual*

# Rollover Work Plan

## Demonstration

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## Scoping and Managing Your Rollover Recommendations

- Put together draft of work plan 4 months before you want your Finance team to start budget review and adjustments
  - Helps others in your organization start thinking through what they may need for the next budget cycle
  - If there are large changes, gives team enough time to prepare
- Reach out to Strata Decision team with items they are assigned to own as soon as possible
- Use work plan to guide your process (at least weekly)
  - When updates are needed, review Excel formulas to update source rather than writing over calculation



*In Scoping and Managing the Rollover Process chapter of manual*



## Scoping and Managing Your Rollover: In-Class Activity

Save off a copy of the work plan template from the Attachments section of your StrataJazz® Home page. Create a work plan for a rollover with the following assumptions:

- 1. You want to begin pushing out global assumptions in the system on January 8 next year.**
- 2. You have already confirmed the budget closure completed successfully from last year's budget cycle.**
- 3. You want to discuss with a Strata Decision consultant adding Reimbursement modeling to the system this year.**
- 4. You do not have any workarounds in place in your database.**
- 5. You would like Strata Decision to provide an hour refresher to your admins on the data flow for Operating Budgeting.**

 *In-Class Activity section of Scoping and Managing the Rollover Process chapter of manual*

# Data Updates/Requirements

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## Data Updates/Requirements

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- Need to make sure all data is ready to go for budget cycle
- Brief instructions for manually importing and managing data, if needed
  - For full details, attend Data Integration certification course



*Data Updates/Requirements chapter of manual*



# Data Needs and Tracking

- Sheets of rollover work plan
- Determine what data is needed, then make sure all appropriate steps have been taken with data
  - Review data types needed
  - Document information for data type (such as import method)
  - Track import and reconciliation for each data type
- Detailed instructions for use in manual



*In Data Updates/Requirements chapter of manual*

# Data Needs and Tracking

## Demonstration

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## Data Needs and Data Tracking: In-Class Activity

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Practice updating the Data Needs and Data Tracking sections of the rollover work plan based on your organization's use of Operating Budgeting.



*In-Class Activity section of Data Updates/Requirements chapter of manual*



# Manual Data Steps

- Instructions in manual for
  - Importing data
  - Verifying data
  - Checking for rejected data
  - Deleting data



*In Manual Data Imports section (of Data Updates/Requirements chapter) of manual*

# Manual Data Import, Verification, and Deletion

## Demonstration

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## Data Updates: In-Class Activity

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Your colleague imported a data file in January and isn't sure it processed correctly, so he has asked for you to look at it with him.

Verify the data and troubleshoot as needed.

Your colleague imported the 2018ActualYTDGLDollarsInClass.csv file that is on the Operating Budgeting Rollover Data dashboard. He used the Shared – GL Dollars Import configuration.



*In-Class Activity section of Data Updates/Requirements chapter of manual*



## Data Updates/Requirements Recommendations

- Make sure files match handoff documentation provided during data integration phase of implementation
  - If changes needed, work with Strata Decision
- Import files from a network location
  - Makes troubleshooting and validating file format next year easier
- Verify and check for rejected data after each import
- When possible, work with the Strata Decision Data Integration team to automate files so you do not need to do additional manual work during the rollover

# Operating Budgeting System Rollover

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# Budget Closure Validation

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## Before we do the rollover, let's review what the closure did...

As a reminder, the closure should...

- **Lock** the budget models
- **Suspend** all budget models
- **Archive data** from the budget forms
- Create a data **snapshot**
- **Archive the budget models** and create an attachment
- **Transfer data to the import tables** based on your selections on the Close Budget page

## Before we do the rollover, let's review what the closure did...

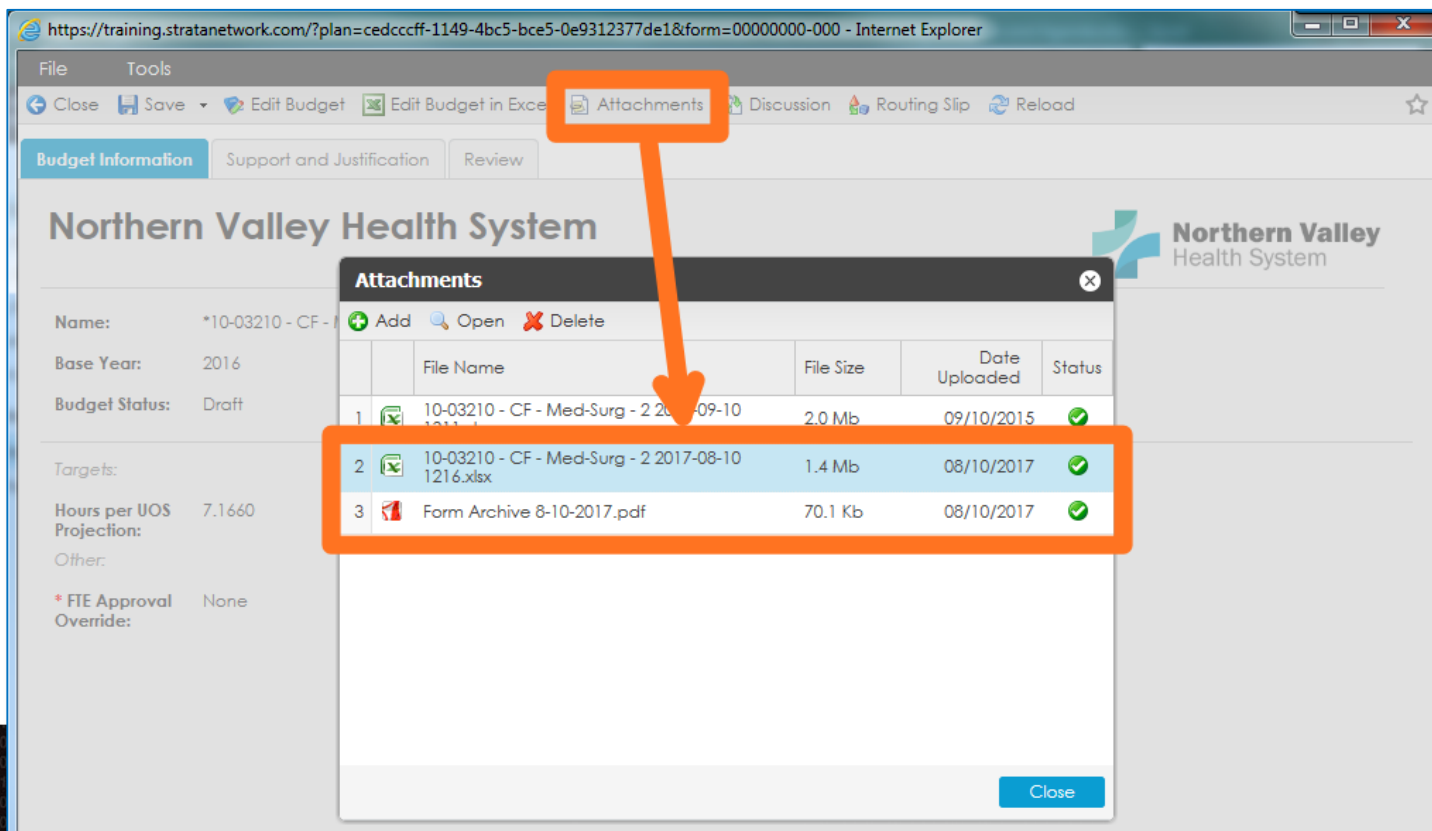
As a reminder, the closure should...

- **Lock** the budget models
  - Only administrative users should be able to enter the models to edit
- **Suspend** all budget models
  - Keep all users from editing budget models
  - Important to keep models in suspended state so no new values saved to database

## Before we do the rollover, let's review what the closure did...

As a reminder, the closure should...

- **Archive data** from the budget forms ?
- **Archive the budget models** and create an attachment



Attachments

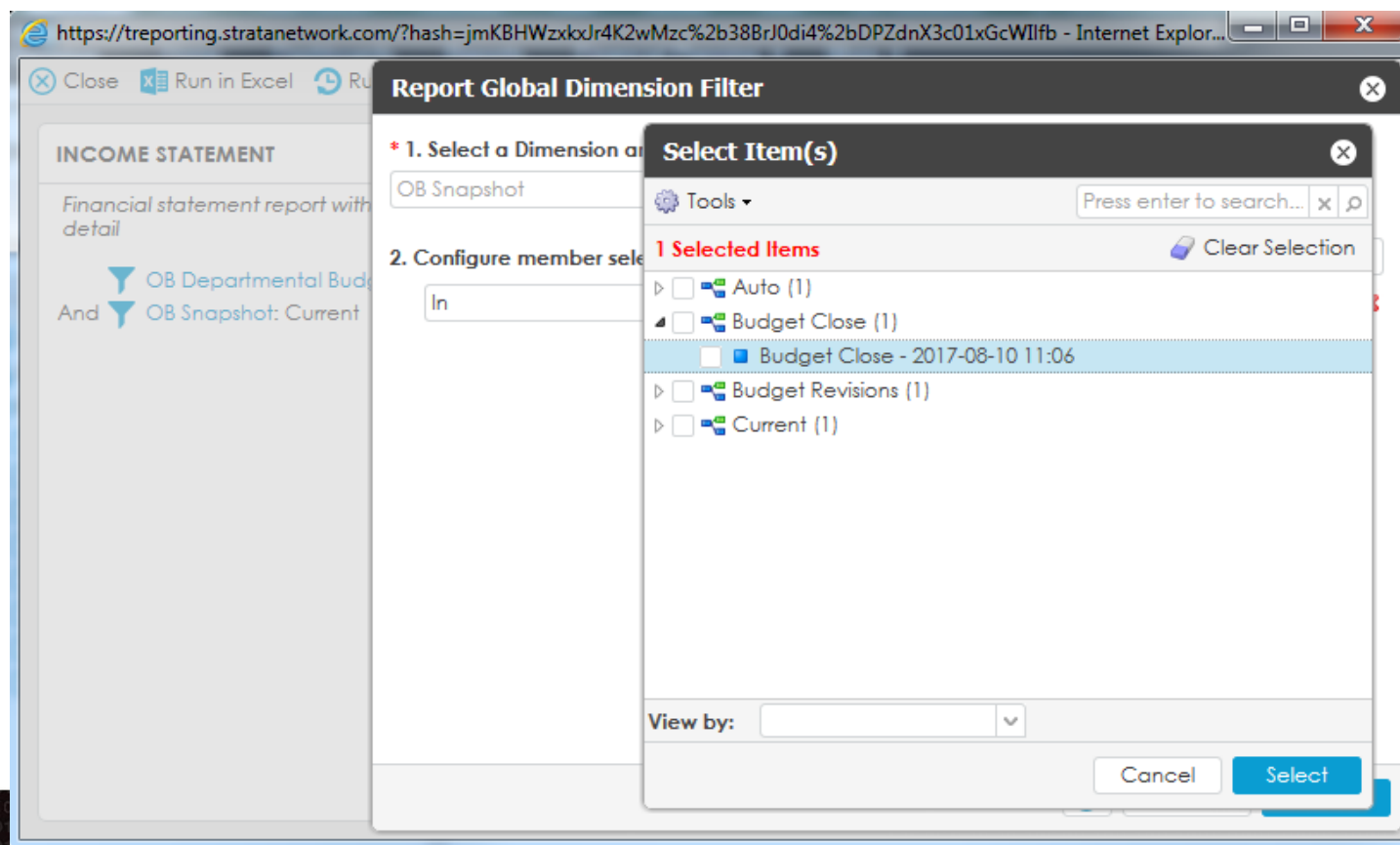
	File Name	File Size	Date Uploaded	Status
1	10-03210 - CF - Med-Surg - 2016-09-10	2.0 Mb	09/10/2015	✓
2	10-03210 - CF - Med-Surg - 2017-08-10 1216.xlsx	1.4 Mb	08/10/2017	✓
3	Form Archive 8-10-2017.pdf	70.1 Kb	08/10/2017	✓



## Before we do the rollover, let's review what the closure did...

As a reminder, the closure should...

- Create a data **snapshot** ?



Report Global Dimension Filter

\* 1. Select a Dimension and member selection

OB Snapshot

2. Configure member selection

In

Select Item(s)

Tools

Press enter to search...

1 Selected Items

Clear Selection

Auto (1)

Budget Close (1)

Budget Close - 2017-08-10 11:06

Budget Revisions (1)

Current (1)

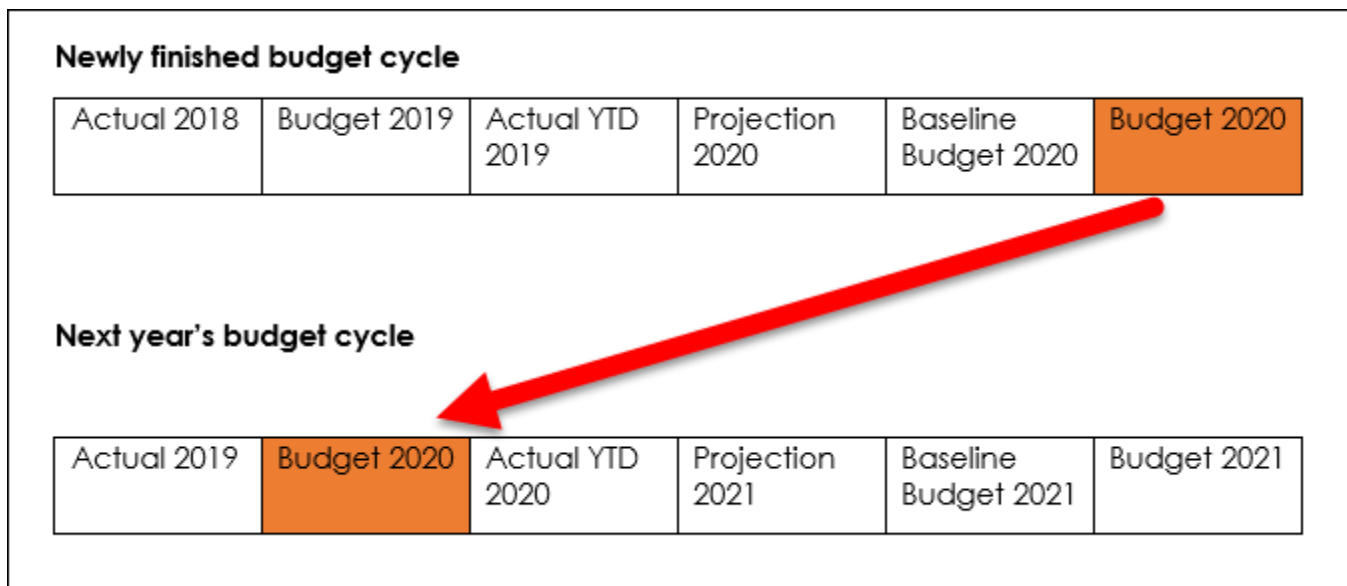
View by:

Cancel Select

## Before we do the rollover, let's review what the closure did...

As a reminder, the closure should...

- **Transfer data to the import tables** based on your selections on the Close Budget page



## Before we do the rollover, let's review what the closure did...

Also changed options available in **System Center** for Operating Budgeting

### Operating Budgeting

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#### Budget Cycle Management

- Begin Budget Preparation
- Close Budget

### Productivity Reporting

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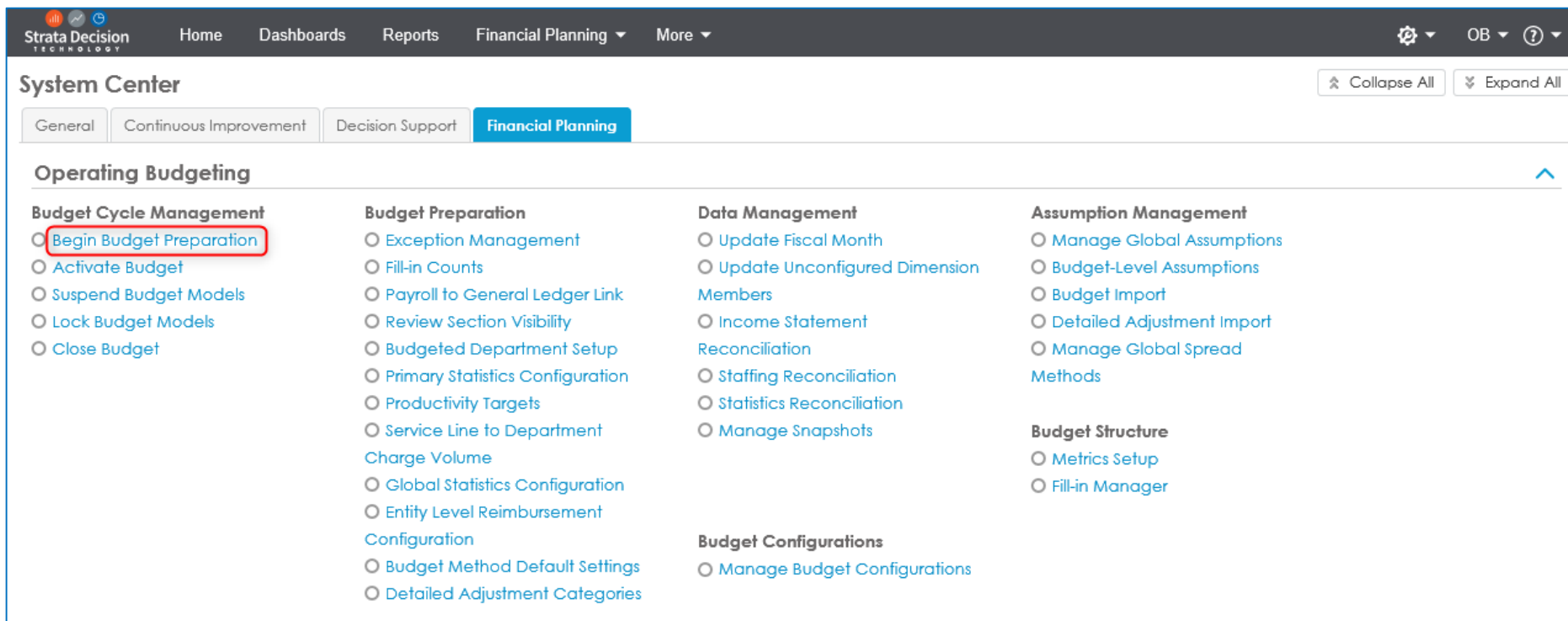
Data Management

Pay Period Sta



# Rollover Steps

## System Center > Operating Budgeting > Budget Cycle Management > Begin Budget Preparation



The screenshot shows the Strata Decision System Center interface. The navigation path is: System Center > Operating Budgeting > Budget Cycle Management > Begin Budget Preparation. The 'Begin Budget Preparation' option is highlighted with a red box. The interface includes a top navigation bar with 'Home', 'Dashboards', 'Reports', 'Financial Planning', and 'More'. The 'Financial Planning' section is active, and the 'Operating Budgeting' section is expanded. The 'Budget Cycle Management' section contains the following options:

- Begin Budget Preparation
- Activate Budget
- Suspend Budget Models
- Lock Budget Models
- Close Budget

Other sections visible include:

- Budget Preparation:** Exception Management, Fill-in Counts, Payroll to General Ledger Link, Review Section Visibility, Budgeted Department Setup, Primary Statistics Configuration, Productivity Targets, Service Line to Department Charge Volume, Global Statistics Configuration, Entity Level Reimbursement Configuration, Budget Method Default Settings, Detailed Adjustment Categories.
- Data Management:** Update Fiscal Month, Update Unconfigured Dimension Members, Income Statement Reconciliation, Staffing Reconciliation, Statistics Reconciliation, Manage Snapshots.
- Budget Configurations:** Manage Budget Configurations.
- Assumption Management:** Manage Global Assumptions, Budget-Level Assumptions, Budget Import, Detailed Adjustment Import, Manage Global Spread Methods.
- Budget Structure:** Metrics Setup, Fill-in Manager.



*In Operating Budgeting System Rollover chapter of manual*

# Begin Budget Preparation

## Demonstration

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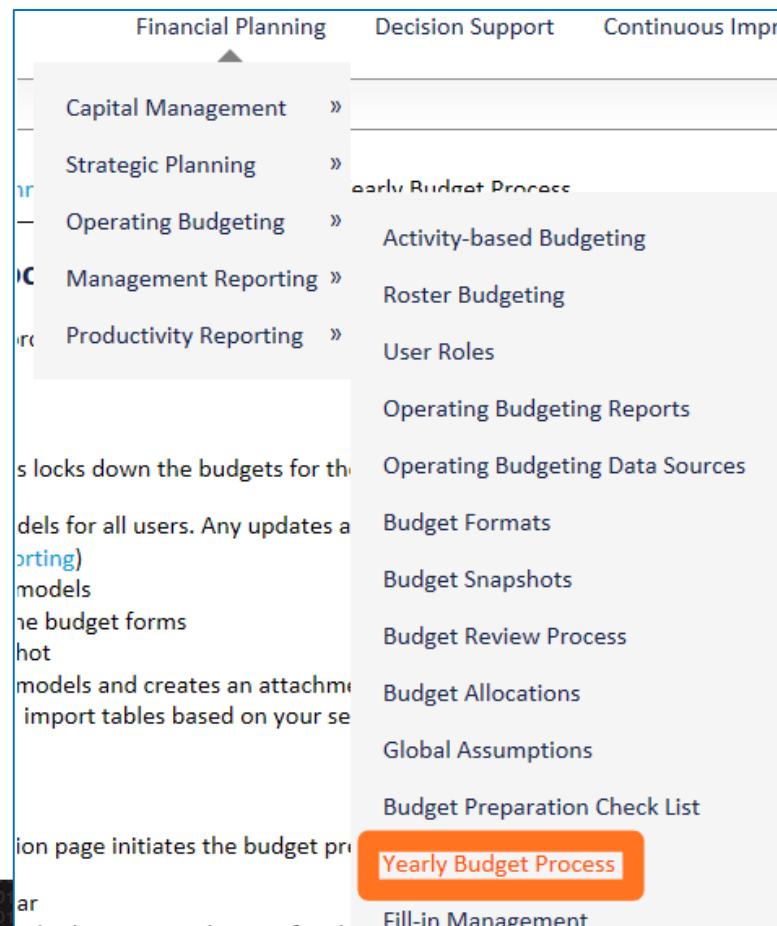
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# Begin Budget Preparation

Details about all the steps Begin Budget Preparation is doing



The screenshot shows a software interface with a navigation menu. The 'Financial Planning' menu is open, displaying a list of options. The 'Yearly Budget Process' option is highlighted with an orange box. Other visible options include Capital Management, Strategic Planning, Operating Budgeting, Management Reporting, Productivity Reporting, Activity-based Budgeting, Roster Budgeting, User Roles, Operating Budgeting Reports, Operating Budgeting Data Sources, Budget Formats, Budget Snapshots, Budget Review Process, Budget Allocations, Global Assumptions, Budget Preparation Check List, and Fill-in Management.



# Yearly Budget Process Help Center

## Topic

## Demonstration

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## Final Steps For Main Rollover Steps

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After Begin Budget Preparation fully finishes...

- Review and update Fill-in Counts
- Publish template

In that order!

Will be rolled into Begin Budget Preparation in the future, but separate for now

## Begin Budget Preparation: In-Class Activity

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Kick off the budget preparation process in your database. You may choose the options to use.



*In-Class Activity section of Operating Budgeting System Rollover chapter of manual*



## Budgeting Rollover Recommendations

- If you are comfortable testing missing one month of YTD data, set the month on the Verify Budget Preparation Settings screen to what you will go live with (so you don't need to update the month again later)
  - If need to update later, use Update Fiscal Month screen
- Come back to Begin Budget Preparation screen later in day to make sure process finished successfully
- Don't forget fill-in counts and publish follow-up tasks!

# Reporting Rollover

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## Ad Hoc Reports

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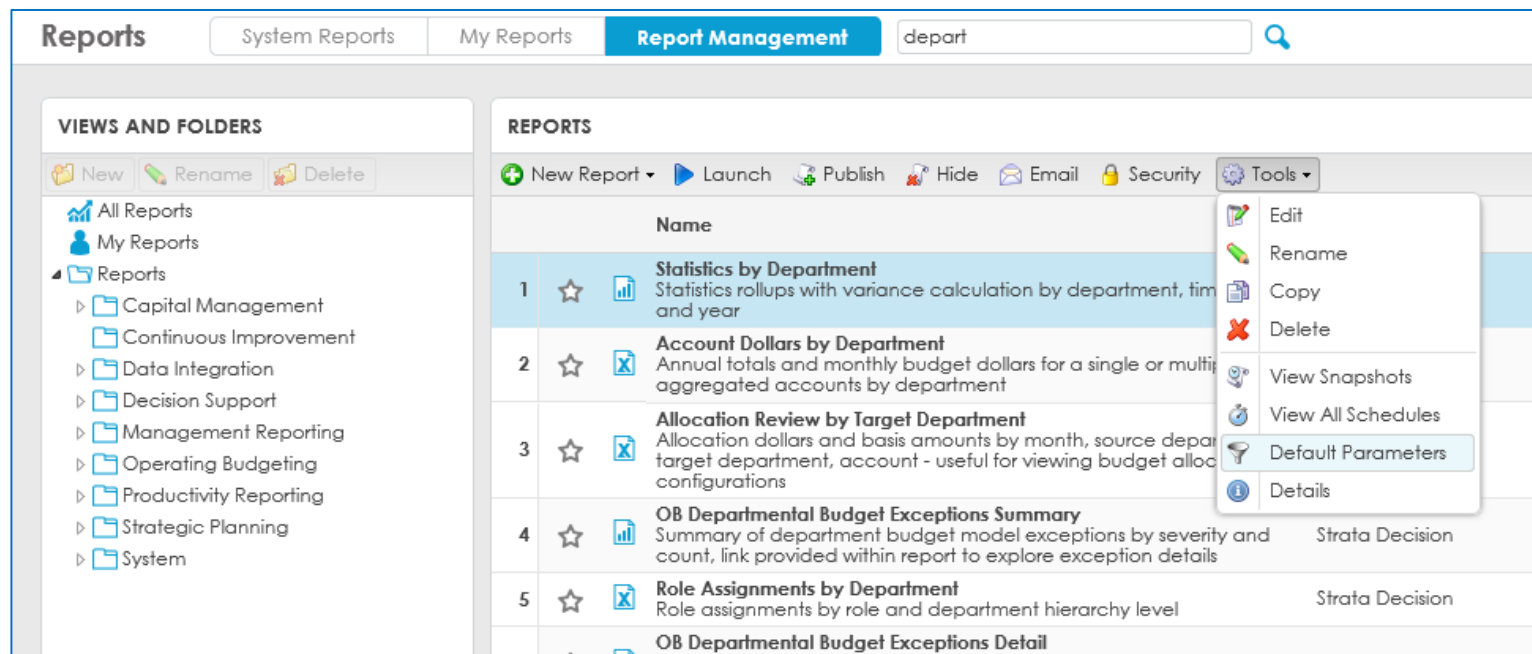
- If set up with budget year reporting crosswalk, shouldn't have to roll over manually!





# Ad Hoc Reports

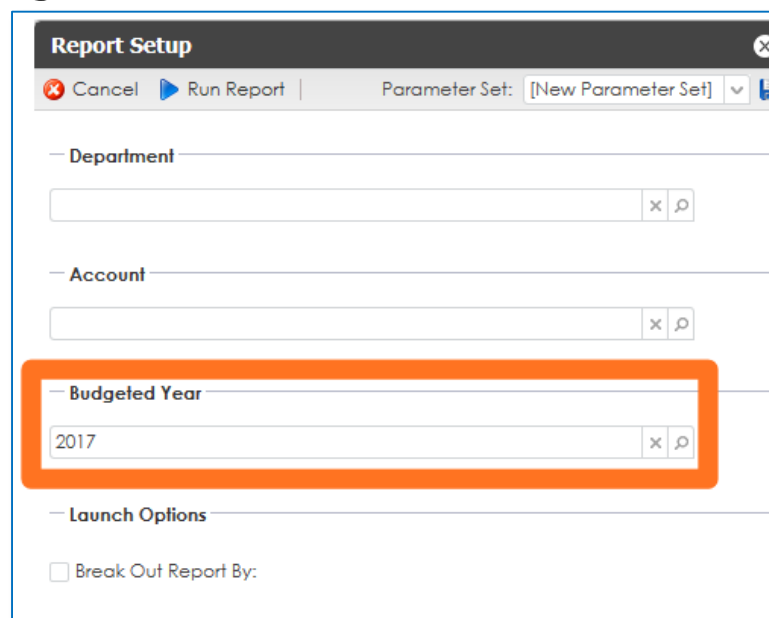
- If set up with budget year reporting crosswalk, shouldn't have to roll over manually!



- Otherwise, update year parameters manually and save report
  - Update report configuration to use crosswalk to minimize rollover work each year

## Excel Reports

- If set up with budget year reporting crosswalk, shouldn't have to roll over manually!
- If year set up as parameter, you can roll over; otherwise, work with Strata Decision to assist in rolling over



**Report Setup**

Cancel Run Report | Parameter Set: [New Parameter Set]

Department

Account

**Budgeted Year**

2017

Launch Options

Break Out Report By:



*In Excel Reports section of Reporting Rollover chapter of manual*

# Budget Crosswalk, Manual Ad Hoc Reporter Rollover, Manual Excel Report Rollover

## Demonstration

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## Reporting Rollover Recommendations

- Check if report has crosswalk before trying to roll over manually
- Update Ad Hoc reports to have reporting crosswalk instead of rolling over manually
- Reach out to Strata Decision for Excel report rollovers that do not have year parameter
- Do not make any changes to Excel reports besides changing default value for parameter

# Data Studio Views

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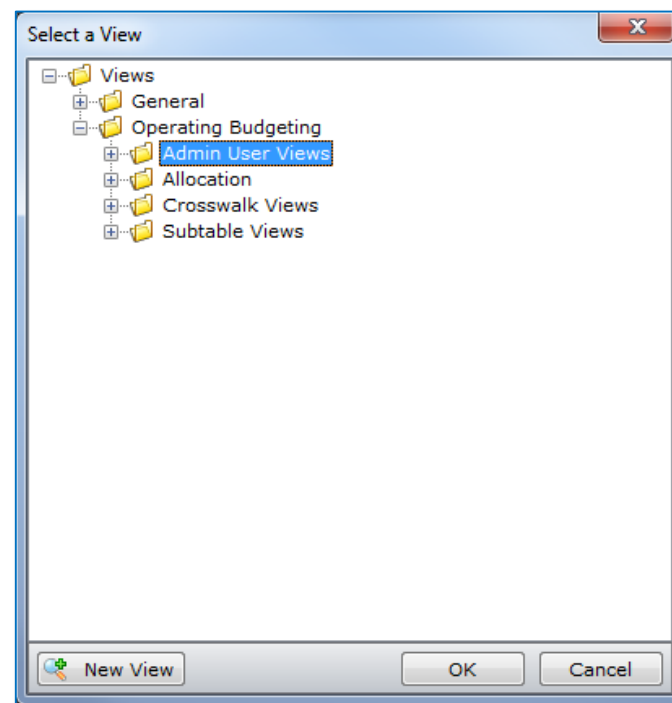
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## Data Studio Views

- Always need to be rolled over manually
- Typically only do ones in **Operating Budgeting > Admin User Views** (unless you have custom ones elsewhere)



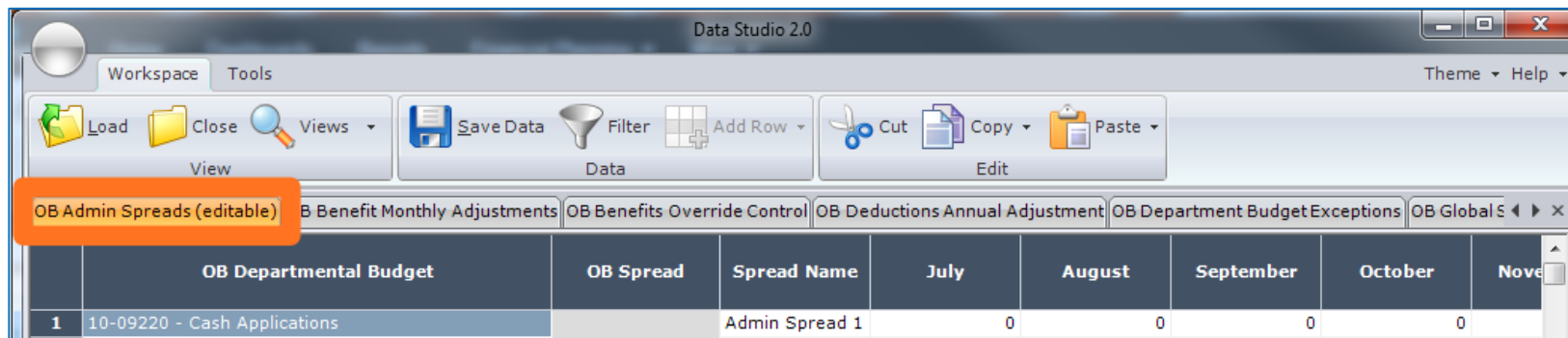
*In Data Studio Views chapter of manual*



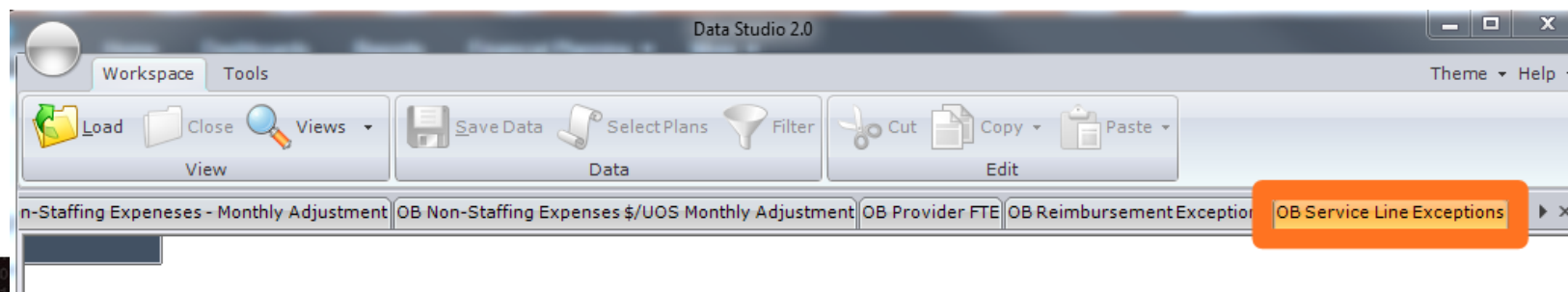
# Data Studio Views

If double-clicking folder to open, wait until first (leftmost) view is highlighted before beginning rollover

Ready to roll over:



Views still opening:



# Data Studio View Rollover

## Demonstration

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## Data Studio Rollover Recommendations

- Move all custom views into standard Admin User Views folder
- Double-click on folder name to open all views at once
- Do not create a new version of the view based on the year, entity, etc.
- Archive views that were broken upon initial review/are no longer used
- Do not attempt to roll over Data Studio views before Begin Budget Preparation run
- Review years in Data Studio views critically; don't assume you should just advance everything one year forward
- If unsure if set up correctly, reach out to Strata Decision! Incorrectly built views can write data to locations that don't exist and cause errors



# Dashboards

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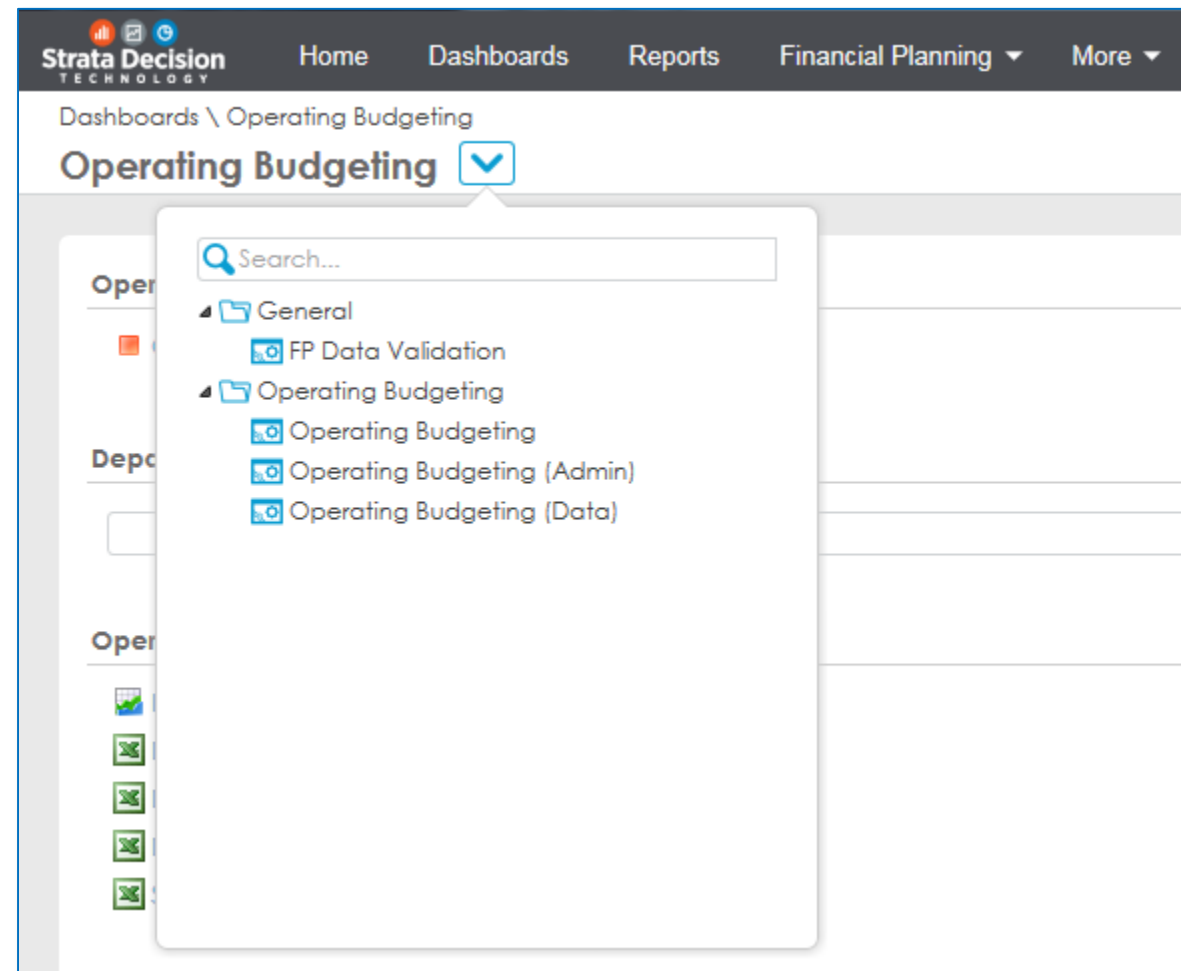
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## Dashboard Rollover

- May not need any extra work
- Just review Operating Budgeting dashboards and make sure any year references are correct
  - After rest of rollover complete





# Reviewing a Dashboard for Rollover Steps Needed

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# Reminders on Other Maintenance

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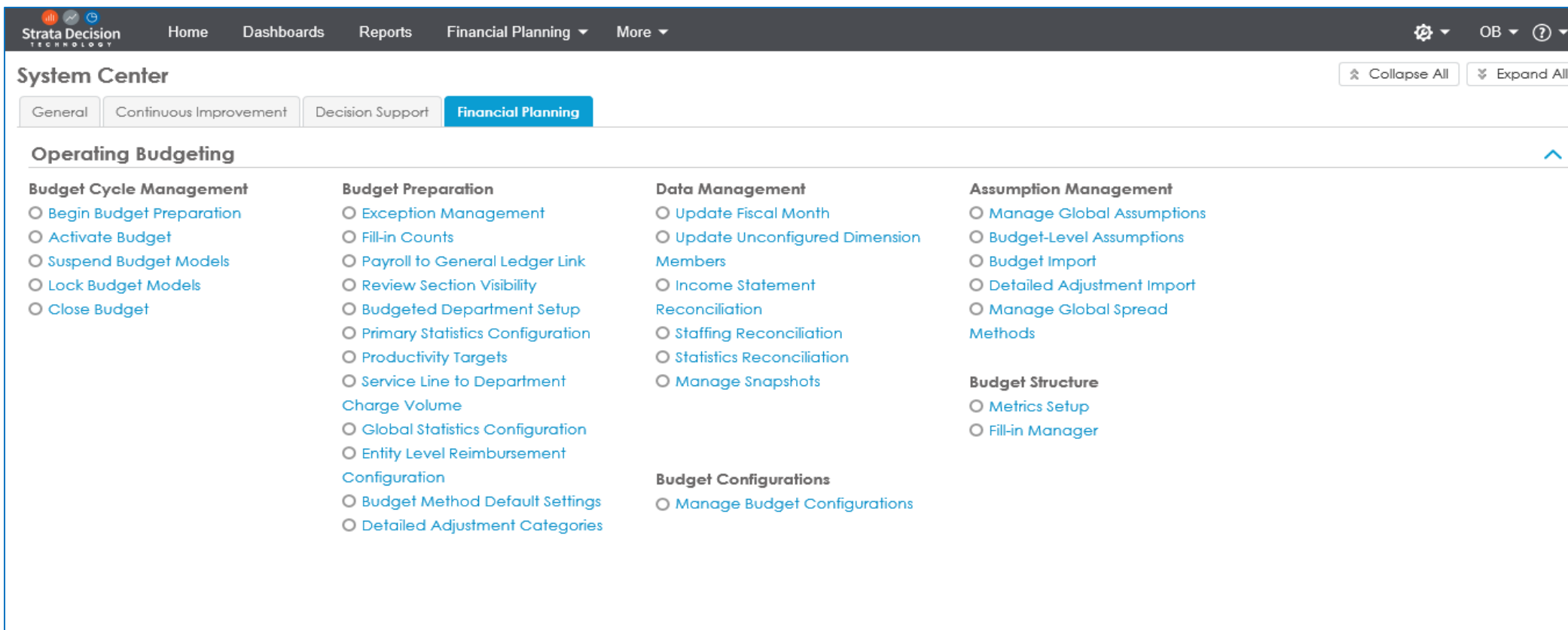
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# Reminders on Other Maintenance

More options in System Center after Begin Budget Preparation finishes:



The screenshot shows the Strata Decision System Center interface. The top navigation bar includes 'Home', 'Dashboards', 'Reports', 'Financial Planning', and 'More'. The 'Financial Planning' dropdown is expanded, showing 'System Center' with 'Collapse All' and 'Expand All' buttons. Below this, there are tabs for 'General', 'Continuous Improvement', 'Decision Support', and 'Financial Planning' (which is selected). The main content area is titled 'Operating Budgeting' and contains several sections of options, each with a radio button:

- Budget Cycle Management**
  - Begin Budget Preparation
  - Activate Budget
  - Suspend Budget Models
  - Lock Budget Models
  - Close Budget
- Budget Preparation**
  - Exception Management
  - Fill-in Counts
  - Payroll to General Ledger Link
  - Review Section Visibility
  - Budgeted Department Setup
  - Primary Statistics Configuration
  - Productivity Targets
  - Service Line to Department
  - Charge Volume
  - Global Statistics Configuration
  - Entity Level Reimbursement
  - Configuration**
    - Budget Method Default Settings
    - Detailed Adjustment Categories
- Data Management**
  - Update Fiscal Month
  - Update Unconfigured Dimension
  - Members**
    - Income Statement
  - Reconciliation**
    - Staffing Reconciliation
    - Statistics Reconciliation
  - Manage Snapshots
- Budget Configurations**
  - Manage Budget Configurations
- Assumption Management**
  - Manage Global Assumptions
  - Budget-Level Assumptions
  - Budget Import
  - Detailed Adjustment Import
  - Manage Global Spread
  - Methods**
- Budget Structure**
  - Metrics Setup
  - Fill-in Manager

## System Center Sections

Now organized into sections based on the activities:

- **Budget Cycle Management** – Control access and make global system administrative changes
- **Budget Preparation** – All screens need to be reviewed prior to starting budgeting
- **Data Management** – Directly impact data
- **Assumption Management** – Push out global assumptions or budget changes across models
- **Budget Structure** – What displays in the models

*\*\*\*Refer to other courses' certification materials for more information about each screen*



# Testing Your Rollover

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# Testing

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- OB Rollover Test Plan embedded in Test Plan section of work plan
  - Update based on your organization's nuances!
- Record items that will need additional follow-up in Open Items section of work plan
- Need to resolve all issues before starting budgeting



# OB Rollover Test Plan and Open Items

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# Troubleshooting Rollover Issues

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# General Troubleshooting

- Reference materials from Operating Budgeting Level 1 – Fundamentals for troubleshooting tips
- A few common rollover issues documented in manual
  - Why/when Begin Budget Preparation or Close Budget are read-only
  - Why/when there are few screens available in Operating Budgeting System Center
  - No Data Studio views have rows after rolling them over



*In Troubleshooting chapter of manual*



# Rollover Options Following Certification

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# Rollover Options Following Certification

- Can run rollover independently, but you have 4 potential options:

	Client-Driven	Client-Driven + Strata Decision PM Services	Client + Strata Decision Jointly Driven	Strata Decision-Driven
Planning Discussions	✓	✓	✓	✓
Process Lookback	✓	✓	✓	✓
Weekly Check-In Calls		✓	✓	✓
Rollover Work Plan Preparation		✓	✓	✓
Rollover Work Plan Task Project Management		✓	✓	✓
Build Tasks – Maintenance and/or Rollover (Up to 8 Hours)			✓	
All Transferable* Build Tasks – Maintenance and/or Rollover				✓
Exception Review (Up to 5 Hours)	✓	✓	✓	✓
Strata Decision System Testing			✓	✓
Client Testing Support (Up to 8 Hours)		✓	✓	✓

## Rollover Options Following Certification

- After successful certification and reviewing the options, reach out to your Strata Decision project owner with chosen option to formalize
  - Decision needs to be in written form at least 4 months prior to target date to open budgets
- Regardless of option chosen, reach out to Strata Decision regardless in these scenarios:
  - Difficult Errors
  - Enhancements
  - Uncertainty



*Rollovers After Certification chapter of manual*

# Closing Thoughts

LIFT 19

STRATA DECISION SUMMIT  
CHICAGO | OCTOBER 21-23



Strata Decision  
TECHNOLOGY



## Following this Course, You Should...

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- Have the **practical skills, processes, and tools** necessary **to close and roll over** your organization's StrataJazz® Operating Budgeting system
- Be able to **minimize** the occurrences when you must reach out to Strata Decision team members to help with a system change or issue

## Additional Resources

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- This manual
- StrataJazz® eLearning (if purchased)
- Product documentation available through Help Center
- Your peers!
- Strata Decision staff

## Getting Certified

- Sign up to get certified at <https://www.stratadecision.com/stratajazzadministratorcertification/>
- Project
  - You will be assigned a training Database to complete your project
  - Database available for **2 months** from when you receive your training materials
- Test
- 75% score on each required to earn certification
- Annually, will have an online quiz to keep certification current

\*\*\*Reach out directly to [training@stratadecision.com](mailto:training@stratadecision.com) for questions related to the certification class, project, or test\*\*\*



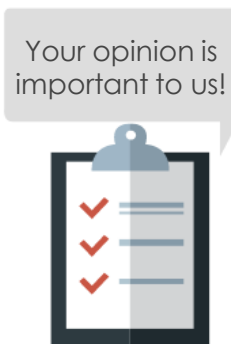
## Other Operating Budgeting Certification Courses

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- Global Statistics offered
- Other supplemental courses to be released in the future

# Training Evaluation

Please complete this five-minute survey prior to leaving training today. Your response will provide us valuable information so that we may constantly improve our delivery, content, and technology, and ultimately provide you with the best possible learning experience.



Access the **survey** through the following link:  
<https://stratadecision.getfeedback.com/certification>

**Certification Training Session: Operating Budgeting  
Level 2 - Rollovers**