ABEST Instructions for Finalizing Budget Structures and Defining Measures

Data Entry for State Agencies, Appellate Courts, and Institutions of Higher Education for the Eighty-sixth Legislature, Regular Session
ABEST INSTRUCTIONS FOR FINALIZING BUDGET STRUCTURES AND DEFINING MEASURES

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DOCUMENT CONVENTIONS

THIS DOCUMENT USES THE FOLLOWING SYMBOLIC CONVENTIONS:

- **Caution**: This symbol warns you of the possible loss of data.

- **Important**: This symbol indicates information you need to know.

- **Tip**: This symbol indicates information that may be useful.
GETTING STARTED

The agency submissions portion of the Automated Budget and Evaluation System of Texas (ABEST) is a web-based application. The Legislative Budget Board (LBB) uses ABEST to track agency requests for appropriations through the stages of the legislative appropriations process and agency performance through the biennial budget cycle.

Agencies are required to finalize their budget structures as well as define their performance measures in ABEST for each upcoming biennium. This work in ABEST is part of the Strategic Plan/Measure Definitions process and includes the following components:

- Review your budget structure, as approved by the LBB and the Office of the Governor, Budget Division.
- Review and assign service categories.
- Define performance measures (definitions, descriptions and cross references).

IMPORTANT

You can simultaneously work in ABEST on your Strategic Plan/Measure Definitions business process as well as your Legislative Appropriations Request (LAR) business process for the upcoming biennium. However, you will not be able to set your LAR Status in ABEST to COMPLETE until your performance measure definitions are completed in ABEST.

You may begin updating performance measure definitions after you receive an email from your LBB analyst informing you that your budget structure for the upcoming biennium has been approved.

For more about strategic planning preparations and deadlines, see Instructions for Preparing and Submitting Agency Strategic Plans Fiscal Years 2019 to 2023. From the LBB website (www.lbb.state.tx.us), click AGENCIES PORTAL and under INSTRUCTIONS click Strategic Plan Instructions.

If you have a problem with the ABEST application that you cannot resolve using the instructions document, call the LBB Help Desk at 512-463-3167 or email the Help Desk (see the sections in this manual titled HELP and HELP DESK CONTACT INFORMATION).

If you have any questions regarding your budget structure or defining the performance measures, contact your LBB analyst. Visit our website at www.lbb.state.tx.us to determine the analyst assigned to your agency. From the home page, select ABOUT LBB→Staff→Analyst Assignments.

ACCESSING ABEST

The following steps should be completed to request a user ID and password for ABEST. If you have forgotten your user ID or password, see the LOGGING IN section on page 3.

To request a user ID, click AGENCIES PORTAL from the LBB website (www.lbb.state.tx.us). Under LOGON INFORMATION, click Agency Logon Request Form as shown on the next page.
Fill out the form, as shown below.

Logon Request Form

Please ensure that you have approval from your supervisor to request a userid.

* Agency: 000 - Unspecified or not applicable
* Full Name: 
* Password: 
* Confirm Password: 
* Phone #: 
Fax #: 
Cell Phone #: 
* Email Address:  

**ABEST (Automated Budget and Evaluation System of Texas)**

Includes:
- Base Recon
- LAR Submissions
- Operating Budget
- Actual Performance Measures
- USAS Reconciliation
- Computer Inventory
- Biennial Operating Plan

Access Needed for: Document Submission

When complete, scroll down and click **Submit**. You should receive an email asking you to confirm the logon request. You must respond to this email; otherwise, your request will not be processed. If you do not receive a confirmation email, call the ABEST Help Desk at 512-463-3167. The LBB will email you a user ID and password for ABEST within one business day.
LOGGING IN

Internet Explorer or Google Chrome can be used for ABEST data entry. Internet Explorer Version 11 is recommended. Other browsers (e.g., Firefox, Safari, Microsoft Edge, etc.) will not work consistently and can create problems in the application. The recommended screen resolution is 1280 x 1024, as shown below.

From the LBB website (www.lbb.state.tx.us), click AGENCIES PORTAL. Under DATA ENTRY APPLICATIONS, click on Automated Budget and Evaluation System of Texas (ABEST) as shown below.

IMPORTANT

If you already have a user ID and have forgotten the user ID or password, or if your user ID or password does not work, do one of the following:

- Under Logon Information on the LBB’s website (www.lbb.state.tx.us), click Agency Logon Help. Enter your user ID or email address and click Remember Me.
- Call the LBB Help Desk at 512-463-3167.
Enter your username and password and click **Login**.

![Login screen](image)

**TIP**

You can also access the Logon Request Form mentioned earlier by clicking **Request Login**.

**PROFILE SELECTION**

The profile screen appears upon successfully logging into ABEST. Options selected on this screen determine the menu layout for a particular business process in ABEST (e.g., Operating Budget, Base Reconciliation, Legislative Appropriations Request, etc.).

From the available drop-down boxes, select **86TH LEGISLATIVE REGULAR SESSION**, **Strategic Plan/Measure Definitions**, **SBR – Base Reconciliation**, and your agency.

![Profile screen](image)

Click **Save Selections** to update your profile, as shown below. The options selected will display on the profile settings bar, which is at the top of each screen. The agency **Status** associated with these settings is also included.

![Profile settings](image)

**IMPORTANT**

Before you enter data, verify that you are in the correct session, business process, and agency. Note that you will not be able to access the menus if your **Status** is set to **RESTRICTED** or **LOCKED** (Status is located at the right top portion of the profile screen). The LBB uses these specific statuses to indicate that work is in progress. Other agencies will appear in your agency drop-down box when their **Status** is set to **COMPLETE** in ABEST. If the Current Profile/Settings are not correct, click in the drop-down boxes to select the appropriate settings and click **Save Selections**.
NEWS SCREEN

The ABEST News screen provides important information and often conveys details about upcoming deadlines. ABEST may direct you to this screen if this is your first time to log in or if the News screen has been updated.

HELP

You can view a user instructions manual online or get help based on your screen location. Click the Help button to view the entire user manual, as shown below.

HELP DESK CONTACT INFORMATION

Contact the LBB Help Desk by clicking on Contact Us, as shown below.
The Help Desk will respond to email inquiries as soon as possible; however, it can take as long as the end of the next business day in some cases.

You can also contact the LBB by calling the Help Desk at 512-463-3167. Be prepared to leave a message when calling the Help Desk. Your call goes directly to voicemail at all times. A typical call back response from the Help Desk is within 30 minutes.

**CHANGING YOUR STATUS TO INCOMPLETE**

Click the Status menu, as shown below.

![Status Menu](image)

Select the INCOMPLETE radio button and click Save.

**IMPORTANT**

ABEST will not allow you to enter data until you set the Status to INCOMPLETE. As you enter data, closing edits will appear on the Status screen. You must clear the edits before you can change your agency Status to COMPLETE. You must set your Status to COMPLETE when you have completed your data entry. See the CHANGING STATUS TO COMPLETE section on page 19.

**CAUTIONS AND IMPORTANT INFORMATION**

**CAUTION**

You will lose data if ABEST is inactive for 30 minutes or more. Always click Save if you leave your computer for more than a few minutes. If ABEST becomes inactive, you must close and reopen your browser and log back in. Any unsaved data must be re-entered.

**CAUTION**

You will lose data if you move to another grid without saving first. Save your work frequently by clicking Save. Any unsaved data must be re-entered.

**IMPORTANT**

Read the News screen when ABEST directs you to it. It often conveys important information regarding changes and upcoming deadlines.
DATA ENTRY CONSIDERATIONS

Refer to the following table for information regarding data entry.

### DATA ENTRY REFERENCE

<table>
<thead>
<tr>
<th>TEXT LIMITATIONS</th>
<th>ENTERING DATA</th>
<th>SAVING DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>• You may copy text from a word processing application and paste it into ABEST, but you should review it and correct formatting problems if necessary. Bulleted lists may not copy properly. Avoid outline styles that combine numbers and bullets.</td>
<td>• Click in the data cell and enter the data.</td>
<td>• Save data by pressing Enter on your keyboard or by clicking Save on the screen.</td>
</tr>
<tr>
<td>• Numeric fields allow 12 digits maximum. Enter only whole dollar amounts, not decimal places. You do not need to enter commas in numeric fields.</td>
<td>• Press Tab to move across to the next cell.</td>
<td>• Use the gray section to add new information to a corresponding grid and click Save.</td>
</tr>
<tr>
<td>• Use the steps below to activate the character counter in Internet Explorer 11.</td>
<td>• At the end of a row, manually click the cursor in a cell on a new row to enter more data.</td>
<td>• Use the built-in calculator by double-clicking in any active data entry cell. After making the calculation and clicking the “=” button, click Send to Grid. The number you calculated transfers to the cell in which the cursor appears.</td>
</tr>
<tr>
<td>o Open Internet Explorer 11.</td>
<td>• You can expand some multi-line text fields by double clicking in the field. Use the Enter key to start a new line of text in a multi-line text field. Click the cursor outside the field or press Tab to move out of the field. Save your work by clicking Save.</td>
<td>• Open the Tools menu in Internet Explorer and choose Internet options. Click the Security tab and select Trusted Sites. Click the Sites button and enter: &quot;.lbb.state.tx.us.&quot;</td>
</tr>
<tr>
<td>o Press the Alt key to display a menu at the top of the screen.</td>
<td>• Click View/Toolbars. Verify that the Status bar is checked. If it is not checked, click on the Status bar to activate the counter.</td>
<td>• To move to the top of a long screen, click the Top hyperlink at the bottom of the screen.</td>
</tr>
<tr>
<td>o Click View/Toolbars. Verify that the Status bar is checked. If it is not checked, click on the Status bar to activate the counter.</td>
<td>• The character counter will display in the bottom left portion of the screen when you enter data into a text field as shown below: Character Count = 40; MAX = 1000.</td>
<td>• To move to the bottom of the screen, click the Bottom hyperlink that is near the top of the screen.</td>
</tr>
</tbody>
</table>

### COLOR CONVENTIONS

• Unsaved numbers appear blue in color. Saved numbers are black.

• Grayed out data cells are “read only” and may not be changed. Contact your LBB analyst to request any changes.

### IF THE EXPLORER STATUS BAR DOES NOT APPEAR

• Open the Tools menu in Internet Explorer and choose Internet options. Click the Security tab and select Trusted Sites. Click the Sites button and enter: ".lbb.state.tx.us."
BUDGET STRUCTURE

Review your agency’s budget structure by clicking the Goals/Objectives/Strategies menu and the Structure submenu.

The goals for your agency display on the screen. Drill down to each level by clicking on the + icon located to the left of each goal and objective. Click on each item listed (as shown below) and detailed information displays on the right portion of the screen for each level.

Review the detailed information for each goal, objective, and strategy. Contact your LBB analyst with any questions regarding your agency’s budget structure.

SERVICE CATEGORIES

Article IV appellate courts/agencies (The Judiciary) are exempt from service category requirements. Skip this section if you are an Article IV court/agency.

Each strategy must have an income, age, and service category assigned. The service categories your agency used for 85-R have been copied forward for 86-R. You will need to assign service categories for new strategies and revise any that have changed.

Click the Goals/Objectives/Strategies menu and the Service Categories submenu, as shown below.
The goal, objective, strategy and strategy short name appear in the leftmost column on the grid. The category codes used last session will appear in each drop-down box for Income, Age and Service. Review the categories assigned for each strategy and revise any that have changed. Assign categories for any new strategies by selecting a category from each drop-down box and click Save.

### DEFINING PERFORMANCE MEASURES

The state of Texas uses a performance-based budgeting system. In the biennial budget cycle, agencies complete strategic plans in the spring/summer before the legislature meets to determine the state’s budget for the following biennium. Agencies are required to review and/or modify the following items in ABEST as they pertain to the budget structure for performance measures.

- Performance Measure Definitions
- Performance Measure Descriptions
- Performance Measure Cross References

In these instructions, we use outcome performance measures for the primary example of working with measures. Working with output, explanatory, and efficiency performance measure definitions are nearly identical processes.

### MEASURE DEFINITIONS

Measure definitions typically remain the same from session to session and for that reason definitions are copied forward from the previous biennium.

If your agency’s budget structure for 86-R has new goals, objectives, strategies, and measures, you will need to enter new definitions for the measures.

If redefining your agency’s budget structure for 86-R includes deleting goals, objectives, and/or strategies, the related measure definitions will not appear in ABEST for 86-R.

Your budget structure may include measures that have changed by type (for example, from outcome to output). A measure that has changed by type will be treated as new in ABEST, and
you will need to re-enter the measure definition. If you cannot copy from a source document and paste into ABEST, you can go into ABEST for a previous session, print a report of the previous measure definitions, and manually re-enter the information for the changed measure.

If a measure has changed significantly, it may be considered new. Your agency, the LBB analyst, and the Office of the Governor, Budget Division will make this determination for your agency.

A performance measure’s definition describes the measure, provides the methodology for its calculation, and gives additional information about the measure. Definitions submitted with the agency’s strategic plan must include the following elements:

- Definitions
- Data Limitations
- Data Source
- Methodology
- Purpose

The definition should provide a brief explanation of what the measure is and give enough detail to provide a general understanding of the measure.

Click the Measure Definitions menu and the Outcomes submenu.

The first outcome measure displays on the screen. If necessary, select a different Goal/Objective from the first drop-down box and the desired Outcome Measure from the second drop-down box (shown below).
TIP
Hover your cursor over the names within the drop-down boxes to show additional information on an item listed in a drop-down box.

Click on the Definitions tab on the Outcome Measure Definition grid, as shown below.

The screen displays the baseline (BL) fiscal years associated with the upcoming session. If the measure is new, these fields will be empty. If it is an existing measure, the measure definition from the current biennium will appear.

Enter or revise the measure’s definition for BL 2020 (required). You only need to enter BL 2021 information if it differs from BL 2020. There is a maximum of 1,000 characters for each definition field. Use the character counter described on page 7, if needed. After entering text for the Definitions tab, click Save at the bottom of the grid.
Click on the remaining tabs displayed on the **Outcome Measure Definition** grid, as shown below. Enter or revise information for BL 2020 and BL 2021 (if necessary) for data limitations, data source, methodology, and purpose tabs.

Review the navigation options below. These options will help you navigate easily within the application and are helpful when you have a large amount of data displayed on the screen.

**NAVIGATION OPTIONS REFERENCE**

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Double Arrow</strong></td>
<td>Use this toggle switch (double arrow) to collapse or expand a particular grid. It will enable you to view the details above/below a particular grid (shown in the following graphic).</td>
</tr>
<tr>
<td><strong>Definition</strong></td>
<td>Hyperlink directs you to the <strong>Outcome Measure Definition</strong> grid.</td>
</tr>
<tr>
<td><strong>Description</strong></td>
<td>Hyperlink directs you to the <strong>Outcome Measure Description</strong> grid.</td>
</tr>
<tr>
<td><strong>Cross Ref</strong></td>
<td>Hyperlink directs you to the <strong>Cross Reference Information</strong> grid.</td>
</tr>
<tr>
<td><strong>Top and Bottom</strong></td>
<td>Hyperlink positions your cursor at the top or bottom of the screen.</td>
</tr>
</tbody>
</table>

**IMPORTANT**

To minimize closing edits, ensure data is entered in the first year for each tab listed on the **Outcome Measure Definition** grid.
MEASURE DESCRIPTION

The measure description includes important details about the performance measure. You must review and or update the following items on the measure description grid:

- New Measure
- Target Attainment
- Priority

The measure description is located on the Measure Definitions screen and displays as the second grid on the screen. Click the Measure Definitions menu and the Outcomes submenu if you have timed out or are no longer on the outcome measure definitions screen.

Select a Goal/Objective from the first drop-down box and an Outcome Measure from the second drop-down box.

Click on the Description hyperlink or scroll down to the second grid labeled Outcome Measure Description, as shown below.
The top portion of the **Outcome Measure Description** grid displays the description that is associated with the outcome measure selected, as shown below. Review the items displayed and contact your LBB analyst if you have any questions regarding the information listed. Any changes to this information must go through your LBB analyst.

If the measure is treated as new in ABEST, the new measure field defaults to “N” which means “No”, and the priority and target attainment fields are blank, as shown below (note: if it is an existing measure in ABEST, the entries copied from 85-R will display).

Click in the appropriate input boxes to enter or revise the **New Measure**, **Priority** and **Target Attainment** fields and click **Save**. For a new measure, the **New Measure** field will need to be changed to “Y” for “Yes”. Your changes will load into the top portion of the grid after you click **Save** (as shown below). The data entry options for the three fields are (hover your cursor over the input boxes to see the following options):

- **New Measure**: Y=Yes, N=No
- **Priority**: H=High, M=Medium, L=Low
- **Target Attainment**: H=High (acceptable attainment is *higher* than target), L=Low (acceptable attainment is *lower* than target)

**IMPORTANT**

All outcome and explanatory measures are noncumulative (denoted as “N” next to the “Calculation” field) and are reported only once a fiscal year.

All output and efficiency measures may be either noncumulative or cumulative (denoted as “C” next to the “Calculation” field) and are reported quarterly during a fiscal year. Data for cumulative measures is entered in quarterly amounts and ABEST will automatically sum performance for each quarter to determine fiscal year to date performance.
**CROSS REFERENCES**

A cross reference is required for all existing performance measures that are not new measures. The cross reference for each measure for the upcoming biennium is copied forward from the current biennium. This information assists the legislature and LBB analysts with tracking performance measures from one biennium to the next.

Measures transferred from one agency to another need to refer back to the transferring agency with a cross reference. You will not be able to change your measure definition **Status** to **COMPLETE** if existing measures lack a cross reference. The only exception is a new measure (note: that is a measure that is considered new for ABEST purposes for the upcoming biennium).

Review the cross reference for each measure for accuracy and make any changes here. Include any measures that were transferred from another agency or program as well.

Click the **Measure Definitions** menu and the **Outcomes** submenu if you have timed out or are no longer on the outcome measure definitions screen. Select a **Goal/Objective** from the first drop-down box and an **Outcome Measure** from the second drop-down box.

Click on the **Cross Ref** hyperlink (as shown below) or scroll down to the third grid labeled **Cross Reference Information**.

The **Cross Reference Information** grid displays detailed information for the outcome selected. The top portion of the screen displays the cross reference copied from 85-R. The options at the bottom of the grid enable you to enter or revise the cross reference.
To enter or revise the cross reference, begin by clicking in the drop-down box labeled Agency to enter the appropriate agency code. If the measure was transferred from another agency for 86-R, select the transferring agency here.

**IMPORTANT**

You cannot assign a cross reference to a new measure. The Cross Reference Information grid will display “No cross reference for new measures” at the bottom of the grid.

Select the Measure Type, Goal/Objective and Outcome Measure for the cross reference and click Save. Your changes will load into the top portion of the grid after you click Save.

**IMPORTANT**

To minimize closing edits, ensure a cross reference is entered for each measure. If the measure is marked new, a cross reference is not required.

You will need to flag measures as new in ABEST if your agency, the LBB, and the Office of the Governor determine a measure has changed considerably.

To delete a cross reference, navigate to the Cross Reference Information grid as described previously and click Delete, as shown in the following graphic.
Repeat these steps to enter measure definitions, descriptions and cross references for each measure for your agency. This may include outcome, output, efficiency, and explanatory measures.

**GENERATING REPORTS**

You may generate reports at any time, regardless of the Status for your agency. However, before printing copies of your final submission, it is essential that you change your agency Status to COMPLETE. See CHANGING STATUS TO COMPLETE section on page 19.

To generate a report, click the Reports menu, shown in the example below.

Click on a report hyperlink.

Use the arrow keys at the top to navigate through multi-page reports. The binoculars icon can be used to search the report (as shown on the following graphic), but before clicking on that icon, enter your search criteria in the text box to the left of the binoculars icon.
To print, click the **printer icon** in the upper left corner on the ABEST screen, as shown below.

To export, click the **first icon** in the upper left corner of the ABEST screen.

After clicking the first icon to export, select the appropriate **export format** from the drop-down list (shown below) and click **OK**. The report will download into the appropriate application. Save your downloaded report file.
Click **Return** to go back to the **Reports** menu.

**CHANGING STATUS TO COMPLETE**

You must change the Strategic Plan/Measure Definitions **Status** for your agency from **INCOMPLETE** to **COMPLETE** to submit your measure definitions and complete your strategic plan. Click the **Status** menu.

If you have no closing edits, select the **COMPLETE** radio button and click **Save**, as shown below.

**IMPORTANT**

If you set the **Status** to **COMPLETE** but subsequently need to revise your data, call your agency’s LBB analyst to get approval to change your **Status** back to **INCOMPLETE**. The LBB Help Desk cannot change your **Status** without LBB analyst approval.

If closing edits display on your **Status** screen, see the following **RESOLVING CLOSING EDITS** section.
RESOLVING CLOSING EDITS

Closing edits will appear on the Status screen when you have failed to enter data or you entered the data incorrectly. The closing edits display important information (e.g., fiscal year, goal, objective, strategy, sequence, etc.) about the item.

If necessary, print the screen for reference by clicking File and Print from your browser menu.

Click the hyperlink displayed above each closing edit section. The hyperlink will direct you to the screen location in question (note: while the hyperlink will take you to the screen location affected, it will not take you to the specific item in question).

Resolve the items listed in each section on the Status screen. Use the hyperlink displayed on the Status screen to direct you to each grid or click on each menu/submenu item as indicated in the below resolutions table. The closing edit will disappear from the Status screen once the issue is resolved. Your agency Status cannot be changed to COMPLETE until all errors are corrected.

<table>
<thead>
<tr>
<th>RESOLUTIONS FOR CLOSING EDITS</th>
</tr>
</thead>
<tbody>
<tr>
<td>CLOSING EDIT</td>
</tr>
<tr>
<td>Outcomes - Missing 1st Year Definitions</td>
</tr>
<tr>
<td>Outcomes - Missing Cross References</td>
</tr>
</tbody>
</table>
## Resolutions for Closing Edits

<table>
<thead>
<tr>
<th>Closing Edit</th>
<th>Resolution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strategy Measures - Missing 1st Year Definitions</td>
<td>The edit indicates that data elements are missing for the 1st year. Data elements include the measure definition, data limitations, data source, methodology, and purpose. Click the Measures Definition menu and the Outputs, Efficiency or Explanatory submenu. Select the goal, objective, and strategy from the Strategy drop-down box and the Measure from the second drop-down box. Click the Definition hyperlink to enter the missing data and click Save.</td>
</tr>
<tr>
<td>(Outputs, Efficiency, and Explanatory Measures)</td>
<td></td>
</tr>
<tr>
<td>Strategy Measures - Missing Cross References</td>
<td>The edit indicates that no cross reference exists for the measure. If the measure is not marked new, a cross reference is required. Click the Measures Definition menu and the Outputs, Efficiency or Explanatory submenu. Select the goal, objective, and strategy from the Strategy drop-down box and the Measure from the second drop-down box. Click the Cross Ref hyperlink to enter the cross reference and click Save. Note that the top section of the grid displays your cross reference. Use the bottom portion of the grid to select or change your cross reference.</td>
</tr>
<tr>
<td>(Outputs, Efficiency, and Explanatory Measures)</td>
<td></td>
</tr>
<tr>
<td>Service Categories</td>
<td>The edit indicates that no service category is selected for a given strategy. Click the Goals/Objectives/Strategies menu and the Service Categories submenu. Select an Income, Age, and Service category from drop-down boxes for the strategy in question and click Save.</td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>