



JUSTICE ADMINISTRATIVE
COMMISSION



**FY 2024-2025
Legislative Budget Request
and
FYs 2024-2025 thru 2028-2029
Long Range Program Plan
for
State Attorney Offices**



State Attorney Offices Meeting Agenda Wednesday, June 7, 2023 9:30 a.m.

- Welcome and Opening Remarks
- PowerPoint Presentation of LBR and LRPP Forms and Requirements
- Open Discussion (questions/answers/comments, etc.)
- Closing Remarks

Presented By:

Justice Administrative Commission Budget Office and
Alton L. “Rip” Colvin, Jr., Executive Director

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Tallahassee, FL 32301

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www.justiceadmin.org

Legislative Budget Request

- Purpose
- Due Dates
- Major Changes
- Reporting Requirements



LBR Purpose

The Legislative Budget Request (LBR) is the mechanism that is used to describe and justify all of an agency's program needs and requirements by category and fund source segmented into issues.

The LBR is a document that contains numerous exhibits and schedules which show the accounting and budgetary picture of an agency for three fiscal years. (Actual Prior Year, which is recorded from FLAIR; Current Year Estimated, which includes adjusted actual appropriations; and the Request Year, which is the budget request). The LBR is prepared at the budget entity level.



LBR Due Date To JAC

* New Download Procedure *



All LBR data entry forms, schedules and exhibits are due to the JAC Budget Office by Friday, July 28, 2023 at 6:00 P.M. EDT

- **Download LBR Templates from MyJAC**
- **Upload all completed LBR documents to the Pydio ‘Completed’ Budget Folder like last year.**
- Email the Budget Office at Budget@justiceadmin.org to confirm that the information has been uploaded.
- If you do not hear from the JAC Budget Office within two business days to confirm submission, please email us again.

LBR Publication Due Date

All completed LBR forms, exhibits, schedules and related documents must be uploaded to the Florida Fiscal Portal by Friday, September 15, 2023.

Written notification (usually by email) must be provided from JAC to Legislative staff and the Governor's Office.



The Florida Fiscal Portal



<http://floridafiscalportal.state.fl.us/Publications.aspx>

This website houses a collection of documents that detail the fiscal status of the State of Florida. Included in this collection are Agency Legislative Budget Requests, Governor's Budget Recommendations, House and Senate Appropriations Bills and a variety of other fiscal publications. The documents have been organized by the Fiscal Year in which they are submitted, the Agency (Organization) responsible for their submission and also by the type of publication.

Documents are stored in PDF, Microsoft Word and Microsoft Excel formats.

LBR Major Changes FY 2024-2025

- Unavailable as of June 7th.
- To be provided when the LBR Instructions are distributed by OPB.





LBR Schedules and Exhibits



LBR Reporting Requirements Summary of Forms

	Exhibit / Schedule Title	Schedule Name	Format
**	1 Agency Transmittal Letter	Not Applicable	Manual
**	2 Agency Issue Request	Exhibit D3-A	LASPBS
*	3 Agency Litigation Inventory	Schedule VII	Manual
	4 Priority listing of Agency Issues Over Base Budget	Schedule VIII-A	Manual for JAC
*	5 Priority Listing of Agency Budget Issues for Possible Reduction - Current Year	Schedule VIIB-1	LASPBS

** If Applicable / ** Optional*

This material covered in May 9, 2023 Presentation



LBR Reporting Requirements Summary of Forms

	Exhibit / Schedule Title	Schedule Name	Format
6	Priority Listing of Agency Budget Issues for Possible Reduction - Request Year	Schedule VIIB-2	LASPBS
*	7 Major Audit Findings	Schedule IX	Manual
8	Organizational Structure	Schedule X	Manual
9	Agency-Level Unit Cost Summary	Schedule XI	LASPBS
*	10 Variance from Long Range Financial Outlook	Schedule XIV	Manual

** If Applicable / ** Optional*



Transmittal Letter – Dept. Template



THE STATE OF FLORIDA
JUSTICE ADMINISTRATIVE COMMISSION

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 Executive Director

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COMMISSIONERS

Diamond R. Litty, Chair
 Public Defender, 10th Circuit
 Kathleen A. Smith
 Public Defender, 20th Circuit
 Brian Haas
 State Attorney, 10th Circuit
 Jack Campbell
 State Attorney, 2nd Circuit

**LEGISLATIVE BUDGET REQUEST
 FISCAL YEAR 2024-25**

Justice Administration
 Tallahassee, Florida

September 15, 2023

Chris Spencer, Policy Director
 Office of Policy and Budget
 Executive Office of the Governor
 1701 Capitol
 Tallahassee, Florida 32399-0001

Tim Sadberry, Staff Director
 Senate Committee on Appropriations
 201 The Capitol
 Tallahassee, Florida 32399-1100

J. Eric Pridgeon, Staff Director
 House Appropriations Committee
 221 The Capitol
 Tallahassee, Florida 32399-1300

Directors:

Pursuant to Chapter 216, Florida Statutes, the Legislative Budget Request for the (insert name of service/budget entity) is submitted in the format prescribed in the budget instructions. The information provided electronically and contained herein is a true and accurate presentation of our proposed needs for the 2024-25 Fiscal Year. This submission has been approved by (insert name and title of agency head).

(Title of Responsible Officer)

Enclosure

- A Department letter will be signed and submitted by JAC's Executive Director on behalf of all JRO's that do not wish to submit a separate letter.

Transmittal Letter –Agency Template

LEGISLATIVE BUDGET REQUEST
FISCAL YEAR 2024-25

Justice Administration
Tallahassee, Florida

September 15, 2023

Chris Spencer, Policy Director
Office of Policy and Budget
Executive Office of the Governor
1701 Capitol
Tallahassee, Florida 32399-0001

Tim Sadberry, Staff Director
Senate Committee on Appropriations
201 The Capitol
Tallahassee, Florida 32399-1100

J. Eric Pridgeon, Staff Director
House Appropriations Committee
221 The Capitol
Tallahassee, Florida 32399-1300

Directors:

Pursuant to Chapter 216, Florida Statutes, the Legislative Budget Request for the (insert name of service/budget entity) is submitted in the format prescribed in the budget instructions. The information provided electronically and contained herein is a true and accurate presentation of our proposed needs for the 2024-25 Fiscal Year. This submission has been approved by (insert name and title of agency head).

(Include any other pertinent statements you wish to include.)

(Signature of Responsible Officer)
(Title of Responsible Officer)

Enclosure

Optional:

- A circuit can use this template to submit their own transmittal letter on circuit letterhead.
- Template will be posted on Budget webpage under ‘Budget Resources’

Agency Litigation Inventory Schedule VII

Schedule VII: Agency Litigation Inventory			
<i>For directions on completing this schedule, please see the "Legislative Budget Request (LBR) Instructions" located on the Governor's website.</i>			
Agency:			
Contact Person:		Phone Number:	
Names of the Case: (If no case name, list the names of the plaintiff and defendant.)			
Court with Jurisdiction:			
Case Number:			
Summary of the Complaint:			
Amount of the Claim:	\$		
Specific Statutes or Laws (including GAA) Challenged:			
Status of the Case:			
Who is representing (of record) the state in this lawsuit? Check all that apply.	<input type="checkbox"/>	Agency Counsel	
	<input type="checkbox"/>	Office of the Attorney General or Division of Risk Management	
	<input type="checkbox"/>	Outside Contract Counsel	
If the lawsuit is a class action (whether the class is certified or not), provide the name of the firm or firms representing the plaintiff(s).			

COMPLETE THIS FORM FOR LITIGATION TALLING \$500,000 OR MORE



Priority Listing of Agency Issues Over Base Budget - Schedule VIIIA

SCHEDULE VIIIA
 PRIORITY LISTING OF AGENCY BUDGET ISSUES
 REQUESTED EXPENDITURES OVER BASE OPERATING BUDGET
 FISCAL YEAR 2024-2025

**State Attorney: Legislative Budget Issue Priorities for Fiscal Year 2024-25
 (First through Twentieth Judicial Circuits)**

Individual State Attorney Circuit Responses:

State Attorney, XX Judicial Circuit

Priority #1

Issue Title: Replacement Equipment
 Issue Code: 2401000
 Fund: General Revenue
 Operations: \$35,555
 Fund: Forfeiture & Investigative Support Trust Fund
 Operations: \$14,024

GENERAL REVENUE

Request \$35,555 to replace furniture and equipment which have exceeded their life expectancy of five years, are worn out, obsolete, a hazard to employees and is no longer cost effective to the State.

FORFEITURE AND INVESTIGATIVE SUPPORT TRUST FUND - FEDERAL

Request \$14,024 to purchase ammunition needed by the investigators for required target practice, tasers, and rain jackets as well as other equipment needs that may arise during the fiscal year.

Priority #2

Issue Title: Public Records Request Workload
 Issue Code: 3009700
 FTE: 2.00
 Salary Rate: 62,307
 Fund: General Revenue
 Salaries and Benefits: \$77,135
 Operations \$8,071

The Legislature has assigned high priority to accountability and transparency! Meeting the public's demand for records is one way of achieving that demand. The workload is increasing and is becoming more complex in its nature. Specialists in this area of legal practice are necessary.



Major Audit Findings/Recommendations Schedule IX

SCHEDULE IX: MAJOR AUDIT FINDINGS AND RECOMMENDATIONS

Budget Period: 2024 - 25

Department: _____

Chief Internal Auditor: _____

Budget Entity: _____

Phone Number: _____

(1) REPORT NUMBER	(2) PERIOD ENDING	(3) UNIT/AREA	(4) SUMMARY OF FINDINGS AND RECOMMENDATIONS	(5) SUMMARY OF CORRECTIVE ACTION TAKEN	(6) ISSUE CODE



Organizational Structure – Schedule X

The Schedule X must display the agency's organization structure for the most recent fiscal year. Section 20.04(8), F.S., requires the Executive Office of the Governor to maintain a current organizational chart of each agency of the executive branch.

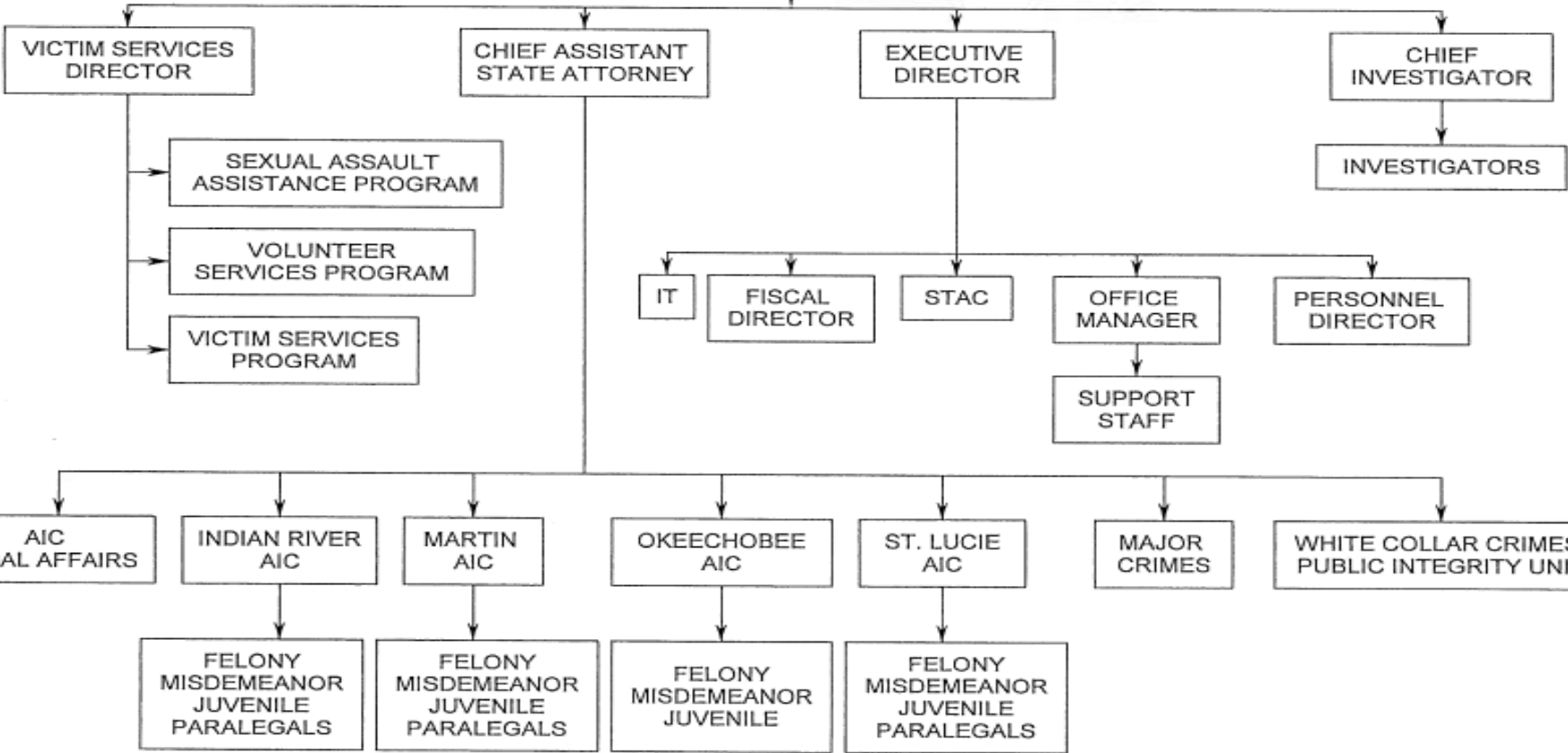
- The Organizational Chart must have an effective date of July 1, 2023
- Identify all positions, [staff names not required] divisions, bureaus, units and subunits of the agency.

Submit organizational charts in **original format**. We will PDF so that it may be uploaded to the Florida Fiscal Portal in a searchable format.



****Please do not submit scanned hard copies.****

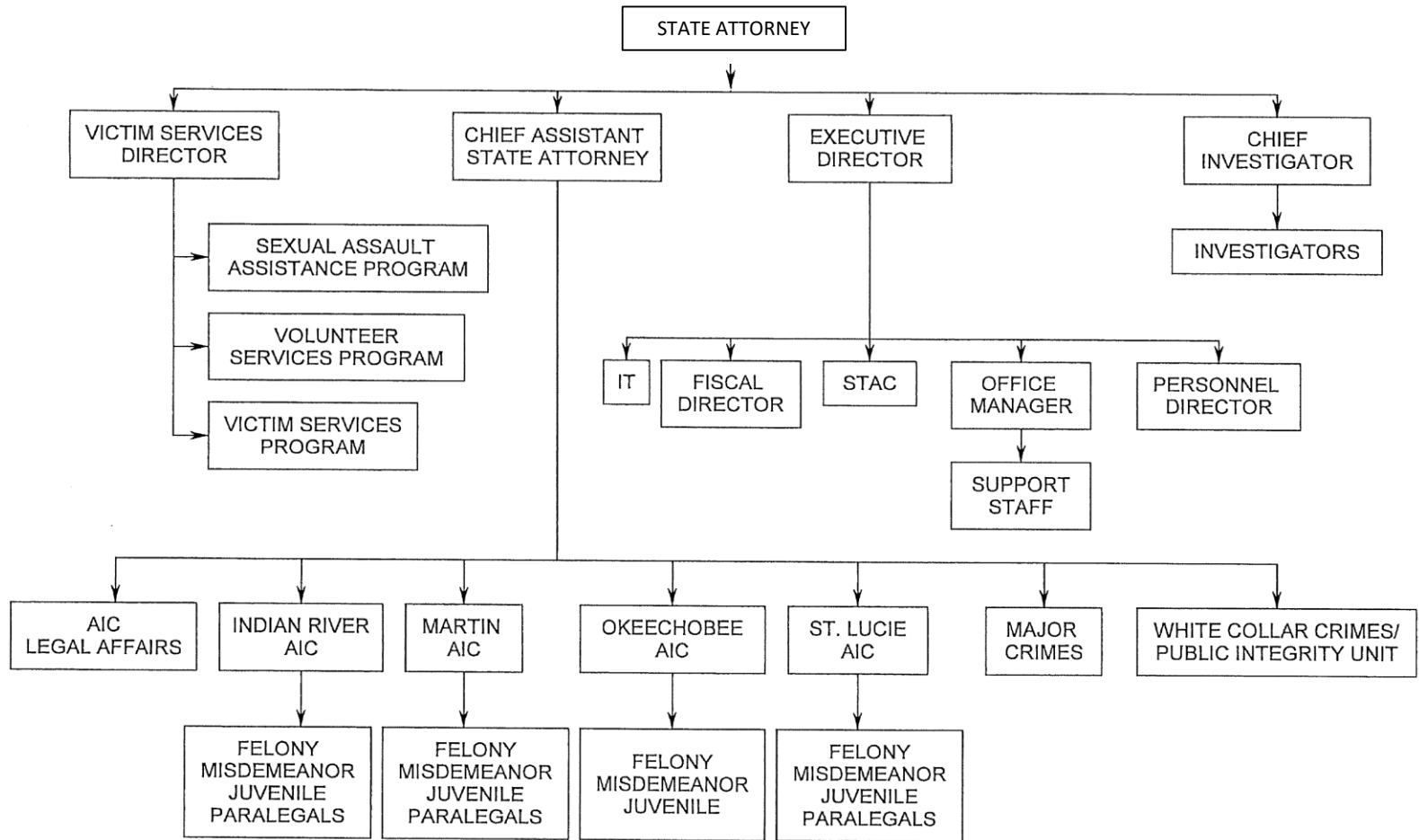
STATE ATTORNEY
 NINETEENTH JUDICIAL CIRCUIT OF FLORIDA
 INDIAN RIVER, MARTIN, OKEECHOBEE, ST. LUCIE COUNTIES



Authorized FTE: 165.00

Organizational Structure - Schedule X
Office of the State Attorney Nineteenth Judicial Circuit
Effective July 1, 2023

Authorized FTE: 165



Serving Indian River, Martin, Okeechobee and St Lucie counties

Unit Cost Summary Data Request Schedule XI

LEGISLATIVE BUDGET REQUEST FY 2024-2025
SCHEDULE XI - UNIT COST SUMMARY DATA

State Attorney, _____ Judicial Circuit

Activity Code	Activity Description	FY 2022-23	
		% Allocation by Activity*	Number of Units Achieved
		Expenditures	Unit Cost Measure
0900	Felony Prosecution	_____	Number of Felony Cases Referred
0910	Misdemeanor Prosecution	_____	Number of Misdemeanor/Criminal Traffic Cases Referred
0920	Juvenile Prosecution	_____	Number of Juvenile Cases Referred
0930	Child Support Enforcement Services	_____	Number of Child Support Enforcement Cases Referred
1070	Civil Action Services	_____	Number of Civil Actions

Provide the number of units achieved in the prior Fiscal Year for each unit cost measure.

* This percentage should be based on the percent of your total 2022-23 budget expended on each activity.

The same percentage will be applied to your total positions in order to allocate FTE by activity.



** This information is needed to calculate the unit cost of the activity.*

Variance from Long Range Financial Outlook Schedule XIV

LEGISLATIVE BUDGET REQUEST FY 2024-2025

Schedule XIV: Variance from Long Range Financial Outlook

Note: This form will be completed by JAC in consultation with the agencies.

Purpose:

Pursuant to Article III, Section 19(a)3, Florida Constitution, Schedule XIV fulfills the requirement that each agency's Legislative Budget Request be based upon and reflect the long range financial outlook adopted by the Joint Legislative Budget Commission or explain any variance from the outlook.

Procedure:

The Schedule XIV spreadsheet is prepared as follows:

- Question 1: Indicate if the long range financial outlook adopted by the Joint Legislative Budget Commission in **September 2023** includes revenue or expenditure estimates related to your agency. If it does, questions two and three will need to be completed.
- Questions 2 and 3:
 - A. List the estimates for revenues and/or budget drivers that reflect an estimate for the agency for the budget request year, the amount projected in the long range financial outlook and the amounts projected in the Schedule I or budget request.
 - B. Explain any variance(s) if the revenue estimates (from the Schedule I) or budget drivers do not conform to the long range financial outlook.

Schedule XIV - Variance from Long Range Financial Outlook (Continued)

Schedule XIV

Variance from Long Range Financial Outlook

Agency: Justice Administration **Contact:** Alton L. "Rip" Colvin Jr.

Article III, Section 19(a)3, Florida Constitution, requires each agency Legislative Budget Request to be based upon and reflect the long range financial outlook adopted by the Joint Legislative Budget Commission or to explain any variance from the outlook.

- 1) Does the long range financial outlook adopted by the Joint Legislative Budget Commission in September 2023 contain revenue or expenditure estimates related to your agency?

Yes	No
<input type="checkbox"/>	<input type="checkbox"/>

- 2) If yes, please list the estimates for revenues and budget drivers that reflect an estimate for your agency for Fiscal Year 2024-2025 and list the amount projected in the long range financial outlook and the amounts projected in your Schedule I or budget request.

	Issue (Revenue or Budget Driver)	R/B*	FY 2024-2025 Estimate/Request Amount	
			Long Range Financial Outlook	Legislative Budget Request
a				
b				
c				
d				
e				
f				

- 3) If your agency's Legislative Budget Request does not conform to the long range financial outlook with respect to the revenue estimates (from your Schedule I) or budget drivers, please explain the variance(s) below.

--



LBR Documents Check List



LEGISLATIVE BUDGET REQUEST -CHECK LIST FY 2024-2025

STATE ATTORNEY, _____ JUDICIAL CIRCUIT

ITEMS TO SEND TO JAC BUDGET OFFICE

All LBR Exhibits, Forms, etc. -Due to JAC on July 28, 2023

<u>Included Y/N</u>	<u>Form Name/#</u>	<u>Required</u>	<u>Optional</u>
_____	Transmittal Letter <i>(JAC will submit letter for the Department)</i>		X
_____	Schedule I Detail of Receipts <i>(for all relevant Trust Funds)</i>	X	
_____	Schedule I Narrative Form <i>(for all relevant Trust Funds)</i>	X	
_____	Schedule IB – Detail of Unreserved Fund Balances	X JAC to provide totals when Sch. I's are completed	
_____	Schedule IC – Reconciliation of Unreserved Fund Balance	JAC to complete	
_____	Reconciliation: Beginning Trial Balance to Schedule I and IC	JAC to complete if applicable	
_____	Schedule VII – Agency Litigation Inventory	If applicable	
_____	Schedule VIIIA – Priority Budget Issues	X	
_____	Schedule VIIIB-1 – Priority Reductions FY 23/24	Not applicable	
_____	Schedule VIIIB-2 – Priority Reductions FY 24/25	X	
_____	Schedule IX – Major Audit Findings and Recommendations	If applicable	
_____	Schedule X – Organization Chart	X	
_____	Schedule XI – Unit Cost Summary Data Request	X	
_____	Schedule XIV – Variance from Long Range Financial Outlook	JAC to complete w/FPAA if applicable	



LBR Documents Check List

(continued)

Included: Y/N	Issue Code Title and Code Number	Required	Optional
	Added Salary and Locality Pay Additive 4200A90		X
	Addition of Specialty Courts Division 3001540		X
	Additional Equipment 2402000		X
	Additional Equipment / Books 2402200		X
	Additional Equipment / Motor Vehicles 2402400		X
	Additional Operational Expenses 3000510		X
	Additional Staffing for Specialty Diversion Courts 3001550		X
	Additional Workstations for New Office Space 2401300		X
	Adjustment to GDTF Authority – Add 4200270		X
	Annualization of Grants and Donations Trust Fund 2600210		X
	Annualization of Prior Year Budget Amendment 2600170		X
	Attorney Recruitment and Retention 4206A00		X
	Attorneys for Specialty Court Division 3004500		X
	Attorneys with Reassigned Death Penalty Cases 5301000		X
	Body Camera Evidence Review 5008010		X
	Capital Qualified Attorneys 3001970		X
	Career Criminal Prosecution 3009620		X
	Circuit Parity Funding 4209A60		X
	Cold Case Unit 3000820		X
	Competitive Area Differential - Funding For Support Staff 4200A10		X
	Competitive Area Differential Funding 4200A60		X
	Computer Crimes Division 3000720		X
	Conviction Integrity Unit 3000410		X
	Cost of Living Adjustment All Staff 4203A70		X
	County Agreement for IT Personnel Services 36224C0		X
	CPM Training 3801010		X
	Crime Analysis and Strategies Unit 5000180		X
	Crime Analyst for Crime Control Intelligence Center 3003070		X
	Cyber Crime 3000720		X
	Deferred Prosecution 3000140		X
	Digital Data Display System (analytical software) 36213C0		X
	Early Case Resolution Division 3000590		X
	Eliminate Unfunded Positions 33V6200		X
	Employee Continuing Education 3800130		X
	Enhanced Other Personal Services 3000640		X
	Enhanced Salary Incentive Payments 3008A10		X
	Establish Trust Fund Authority 4203300		X
	Extraordinary Multi-Victim Homicide Invest & Prosec 3009910		X



Budget Authority Realignment

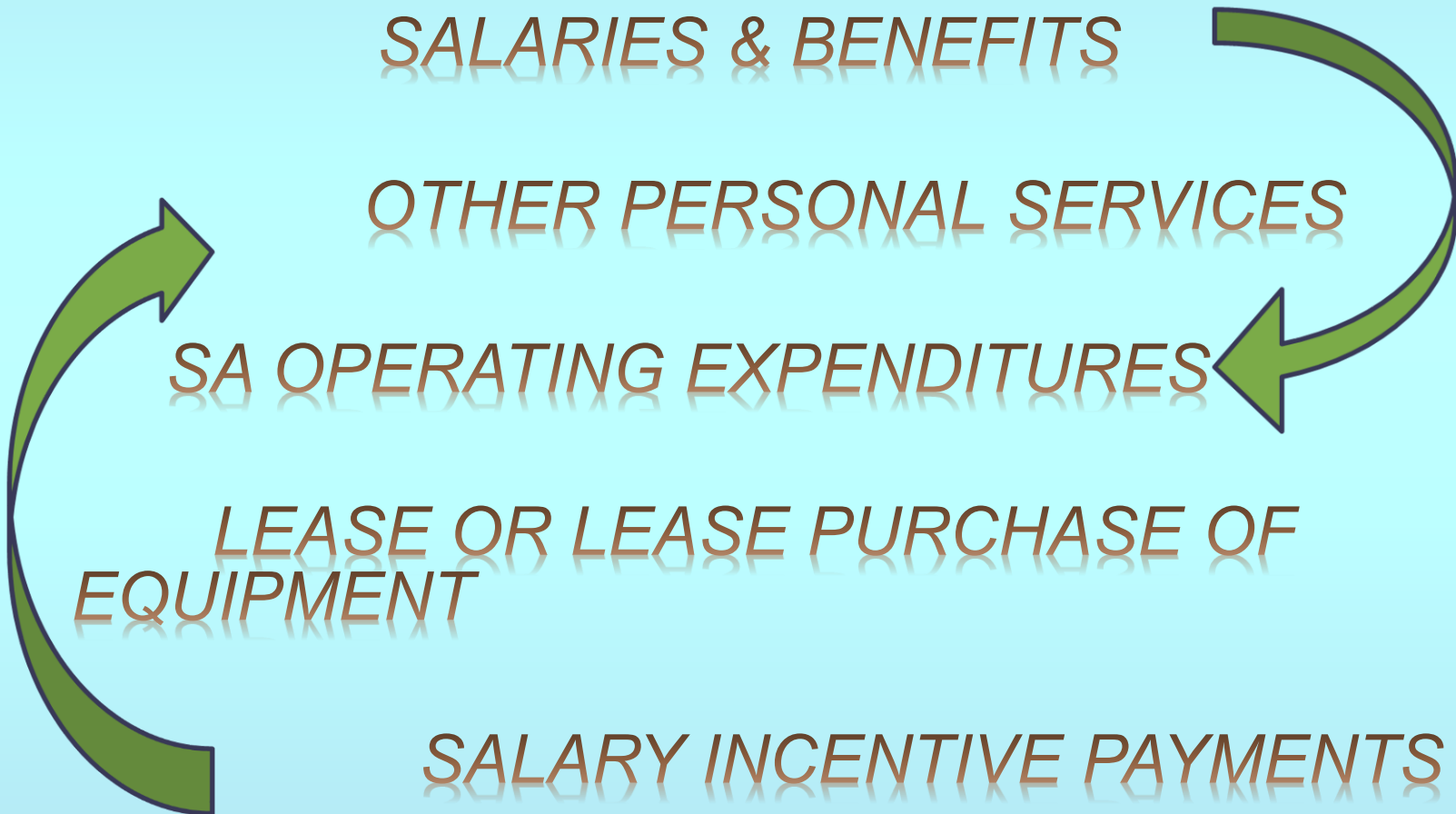
SALARIES & BENEFITS

OTHER PERSONAL SERVICES

SA OPERATING EXPENDITURES

*LEASE OR LEASE PURCHASE OF
EQUIPMENT*

SALARY INCENTIVE PAYMENTS



Realignment of Budget Authority

A consistent need to request 5% or \$250K (whichever is greater) budget amendments for movement of budget authority between categories or between budget entities multiple times during consecutive fiscal years or at the end of every fiscal year are excellent candidates to consider realigning their budget.

How do you know if your budget authority needs realigning?

- Analyze the prior three to five year history of the number and types of budget transfers that your office has requested.
- Review your base budget by category to determine if amounts appropriated by category are sufficient to accommodate anticipated expenditures.
- Determine if there are any on-going shortfalls or surpluses in any categories.

Realignment of Budget Authority (continued)

Example: *An agency consistently moves \$10,000 in General Revenue each year into the Other Personal Services (OPS) category and wishes to make this action permanent.*

Approval of a realignment issue in the LBR will allow this agency to avoid future budget amendments.

Realignment LBR Issue: Move GR Budget Authority Between Categories

<u>Appropriation Category</u>	<u>Fund</u>	<u>Amount</u>	<u>Issue Code</u>
OPS (030000)	GR	\$10,000	2000100 (Add)
Salaries and Benefits (010000)	GR	-\$10,000	2000200 (Deduct)



Realignment of Appropriation Categories Related to Administered Funds

Administered funds such as **Pay Increases, Health Insurance Adjustments, and Retirement Adjustments** are appropriated in one statewide lump sum line item in the General Government section (Section 6) of the GAA. These appropriations will be distributed to each agency by the Governor's Office of Policy and Budget (OPB) and can be seen on the agency's Appropriation Ledger once they have been approved.

These distributions are not allocated 100% to General Revenue, but are based on the fund split in the GAA for your Salaries & Benefits category (each budget entity is different).



Realignment of Appropriation Categories Related to Administered Funds (continued)

Example of GAA Salaries & Benefits Appropriation Administered Fund Split:

<u>Fund</u>	<u>Appropriation</u>	<u>% of Total</u>
General Revenue (GR)	\$ 8,500,000	85.00%
Grants & Donations TF	\$ 500,000	5.00%
State Attorney Rev. TF	<u>\$ 1,000,000</u>	<u>10.00%</u>
Total	\$10,000,000	100.00%

- Administered Funds allocations for Retirement, Health, etc. would be applied at 85% GR and 15% TF.
- A Retirement Adjustment of \$100,000 would be allocated:
 GR: \$85,000 G&D TF: \$5,000 SARTF: \$10,000



Realignment of Appropriation Categories Related to Administered Funds (continued)

Trust funds must be maximized by OPB for all Salary adjustments.

An agency may end up with excess Salaries & Benefits budget authority in their trust funds.

You may wish to consider moving excess Salaries and Benefits trust fund authority to a different appropriation category, such as Operations while also transferring GR budget from Operations into Salaries and Benefits.



Realignment of Appropriation Categories Related to Administered Funds (continued)

Realignment LBR Issue (Move Budget Authority Within Same Fund):

<u>Appropriation Category</u>	<u>Fund</u>	<u>Amount</u>	
Salaries & Benefits (010000)	SARTF	(\$250,000)	← Action 1 of 3
SA Operations (103225)	SARTF	\$250,000	

<u>Appropriation Category</u>	<u>Fund</u>	<u>Amount</u>	
Salaries & Benefits (010000)	GDTF	(\$200,000)	← Action 2 of 3
SA Operations (103225)	GDTF	\$200,000	

<u>Appropriation Category</u>	<u>Fund</u>	<u>Amount</u>	
SA Operations (103225)	GR	(\$450,000)	← Action 3 of 3
Salaries and Benefits (010000)	GR	\$450,000	



LBR Issues Data Entry Form

Realignment of Administrative Expenditures -

ADD IC# 2000100

Legislative Budget Request for FY 2024-2025

Section 1

Agency	State Attorney Office	Circuit/Region
Issue Title and Code:	Realignment of Administrative Expenditures -Add 2000100	

Section 4

Appropriation Category Title / Code	Fund Title	FSI	Dollars	
			Total Request	Total Non-Recurring
Salaries and Benefits (010000)	General Revenue (FID #1000)		\$ 450,000	
State Attorney Operating Expenditures (103225)	SA Revenue Trust Fund (FID #2058)		\$ 250,000	
State Attorney Operating Expenditures (103225)	Grants and Donations Trust Fund (FID #2339)	1	\$ 200,000	
			\$ 900,000	\$ -



LBR Issues Data Entry Form

Realignment of Administrative Expenditures – DEDUCT IC# 2000200

Legislative Budget Request for FY 2024-2025

Section 1

Agency	State Attorney Office	Circuit/Region
Issue Title and Code:	Realignment of Administrative Expenditures -Deduct 2000200	

Section 4

Appropriation Category Title / Code	Fund Title	FSI	Dollars	
			Total Request	Total Non-Recurring
State Attorney Operating Expenditures (103225)	General Revenue (FID #1000)		\$ (450,000)	
Salaries and Benefits (010000)	SA Revenue Trust Fund (FID #2058)		\$ (250,000)	
Salaries and Benefits (010000)	Grants and Donations Trust Fund (FID #2339)	1	\$ (200,000)	
			\$ (900,000)	\$ -



Realignment LBR Issue for Administered Funds (continued)

Category / Fund	Pre- Realignment Appropriation	% of Total	\$100,000 Administered Funds Adjustment
<u>Salaries & Benefits</u>			
General Revenue	\$ 8,500,000	85.00%	\$ 85,000
GDTF	\$ 500,000	5.00%	\$ 5,000
SARTF	\$ 1,000,000	10.00%	\$ 10,000
Total	\$ 10,000,000	100%	\$ 100,000
Fund	Post- Realignment Appropriation	% of Total	\$100,000 Administered Funds Adjustment
<u>Salaries and Benefits</u>			
General Revenue	\$ 8,950,000	89.50%	\$ 89,500
GDTF	\$ 300,000	3.00%	\$ 3,000
SARTF	\$ 750,000	7.50%	\$ 7,500
Total	\$ 10,000,000	100%	\$ 100,000



Reduce Surplus Budget Authority

IC3301510-Reduce Trust Fund Authority

The accumulation of budget authority in trust funds can become problematic. If there is insufficient cash to support the additional budget authority you may want to consider deleting unfunded budget.

BEFORE: Example GAA Salaries and Benefits Fund Split			AFTER: Example GAA Salaries and Benefits Fund Split		
Fund	Appropriation	% of Total	Fund	Appropriation	% of Total
General Revenue	\$8,500,000	85.00%	General Revenue	\$8,500,000	86.73%
GDTF	\$500,000	5.00%	GDTF	\$300,000	3.06%
SARTF	\$1,000,000	10.00%	SARTF	\$1,000,000	10.20%
Total	\$10,000,000	100%	Total	\$9,800,000	100%

By reducing surplus trust fund salary authority, this will increase the percentage of GR to the overall total salary appropriation. This will increase the GR Salaries and Benefits administered funds allocations in the future.





Trust Fund Reporting

Schedule I Series

What is a Trust Fund

- A Trust Fund serves as a depository for funds that are earmarked for a specified purpose and not be used for anything to the contrary.
- It is created by law and remains in existence and active for a period of four (4) years and then undergoes Legislative review.
- At that time the trust fund may be re-created, retained, terminated, or modified at the request of an agency during the LBR process via the submission of a Schedule 1D Form.



What is a Trust Fund

- Trust Funds must have specific sources of receipts/revenues [*state, federal, municipal, etc.*] and can have certain restrictions or prohibitions as to allowable expenditures from the trust fund or types of receipts deposited thereto.
- There are 8 Department trust funds with 113 budget entity designations within Justice Administration.
- All agencies that are administratively served by JAC are required to report their trust funds activities annually via submission of the LBR Schedule I Series of Reports.



Reporting Requirements Schedule I Trust Fund Series

	Title	Format
1	Estimated Receipts – Current year and Request year [Section I]	LASPBS
2	Trust Fund Narrative	Manual
★	3 Detail of Non-Operating Expenditures [Section II]	LASPBS
★	4 Adjustments [Section III]	LASPBS
5	Summary [Section IV]	LASPBS Auto Entry Only
★	6 Detail of Unreserved Fund Balance [Schedule IB]	LASPBS
★	7 Reconciliation of Unreserved Fund Balance [Schedule IC]	Manual
★	8 Reconciliation: Beginning Trial Balance to Schedule I and IC	Manual
★	9 Inter-Agency Transfers Reported on Schedule I	Manual



Completed by JAC Budget Office



Trust Fund Schedule I Format

The Schedule I summarizes revenues, nonoperating expenditures, adjustments, and operating expenditures.

Section I: Detail of Revenues

Section II: Detail of Non-Operating Expenditures

Section III: Accounting Adjustments

Section IV: Summary (combines Sections I thru III data and displays unreserved fund balances-Line I)

Section V: Schedule IB: Detail of Unreserved Fund Balance: which identifies the funding sources and dollars associated with the ending unreserved fund balances.

Trust Fund Schedule I Format

The information that is reported on the Schedule I document summarizes revenues, non-operating expenditures, accounting adjustments, and operating expenditures which are presented in five sections within three primary columns for three consecutive fiscal years as follows:

- Column A01 - displays the Actual Prior Year FY 2022-2023
- Column A02 - displays the Current Year Estimate FY 2023-2024
- Column A03/A12 - displays the Agency Request FY 2024-2025. This is input by JAC into Column A03 and systematically via LASPBS becomes Column A12 after submission of the LBR.
- A fourth column, A04 - displays the Agency Request Non-Recurring portion of the amounts entered in Column A03/A12.

Schedule I Revenue Estimates

1. Estimated Revenue Receipts: Using contracted and pre-determined (Article V Fees) amounts or methodical estimates to project revenue receipts in the current year and the agency LBR request year, by revenue source. Reflected in Section I.

Circuits/Office must provide estimated receipts on the provided data entry form.



Schedule I Revenue Estimates

Prior Year Example for SARTF

		TITLE			CODE		BUDGET PERIOD 2023-2024		
DEPARTMENT:		Justice Administration			21				
BUDGET ENTITY:		State Attorney, Judicial Circuit			21...00				
FUND:		State Attorneys Revenue Trust Fund			2058				
							Enter Current Yr.	Enter Request Yr.	Enter Request Yr.
SECTION I: DETAIL OF REVENUES (TFR)							Est. Revenues	Est. Revenues	Non-recurring
Line #	Description	Rev/Adj Code	Serv Charge	Authority	Matching State IC Local IC		Column A02 FY 2022-23	Column A03 FY 2023-24	Column A04 FY 2023-24
01	ARTICLE V TRAFFIC FINES	001225	8%	318.18	0.00%	0.00%	\$ 72,800	\$ 72,800	
03	WORTHLESS CHECKS	000100	8%	832.08	0.00%	0.00%	\$ 250	\$ 250	
04	COST OF PROSECUTION	001205	8%	938.27	0.00%	0.00%	\$ 490,000	\$ 510,000	
10	\$250 SURCHARGE PROSECUTE CRIM USE PERSONAL I	001204	0%	817.568	0.00%	0.00%	\$ -	\$ -	\$ -
17									
18									
19									
							\$ 563,050	\$ 583,050	\$ -

JULY EDR

mda

** As instructed by OPB, JAC will insert the estimated receipts for Article V Traffic Assessments based on allocations of the most current

Schedule I Section I

Prior Year Example for SARTF

BPSC1L01 LAS/PBS SYSTEM
 BUDGET PERIOD: 2013-2024
 STATE OF FLORIDA

SCHEDULE I - LBE
 TRUST FUNDS AVAILABLE

SP 10/05/2022 09:16 PAGE: 10
 SCHEDULE I
 TRUST FUNDS AVAILABLE

COL A01	COL A02	COL A03	COL A04
ACT PR YR	CURR YR EST	AGY REQUEST	AGY REQ N/R
EXP 2021-22	EXP 2022-23	FY 2023-24	FY 2023-24

JUSTICE ADMINISTRATION 21000000
 STATE ATTORNEYS 21500000
 PGM: SA- , JUD CIRCUIT 21000000

FUND: STATE ATTNYS REVENUE TF 2058

SECTION I: DETAIL OF REVENUES

	REVENUE CODE	CAP	SVC CHG%	AUTH ST	MATCHING % I/C LOC I/C	CFDA NO.				
01 ARTICLE V TRAFFIC FINES	001225	NO	8.0		318.18	0.00	0.00	68,581	72,800	72,800
03 WORTHLESS CHECKS	000100	YES	8.0		832.08	0.00	0.00	210	250	250
04 COST OF PROSECUTION	001205	NO	8.0		938.27	0.00	0.00	462,400	490,000	510,000
08 TRANSFER IN - AUCTION PROCEEDS FROM DMS 2510	001520	NO	8.0		938.27	0.00	0.00	5,394		

TOTAL TO LINE B IN SECTION IV

536,585	563,050	583,050
---------	---------	---------

Schedule I Narrative

2. Revenue Estimating Methodology:

Provide a detailed explanation of the methodology used to determine the revenue estimates for FY 2023-24 and FY 2024-25 as shown on the Schedule I Data Entry form.

Circuits/Office must provide information as to how estimated receipts were determined which includes providing calculations.

Schedule I Narrative Template

SCHEDULE I TRUST FUND NARRATIVE

FY 2024-2025 LEGISLATIVE BUDGET REQUEST

Circuit/Office Name: State Attorney, 1 Judicial Circuit

Trust Fund Name: State Attorney Revenue Trust Fund, FID# 2058

Name of Person Completing This Form: ~~XXXX XXXXXXXX~~

Telephone #: ~~XXX-XXX-XXXX~~

Revenue Estimating Methodology:

Article V Traffic Fines: Projections for Article V traffic fines are based on the July 2022 Revenue Estimating Conference Meeting where the estimated Revenue Distributions by Fund aggregate total receipts for all State Attorney Offices is projected to be \$5.6 M for FY 2022-2023 and \$5.6 M in FY 2023-2024. Using each circuit's pro-rata share of the total actual receipts for FY 2021-22, SA estimated receipts are \$72,800 for FY 2022-2023 and \$72,800 for FY 2023-2024.

Cost of Prosecution: The State Attorney's Office, 1 Judicial Circuit, projects revenue of \$490,000 for Fiscal Year 2022-2023. For Fiscal Year 2023-2024, the revenue projection is \$510,000. These projections are based on actual receipts collected in FY 2021-2022 with consideration of the number of cases that are currently being handled by the agency's Pre-Trial Diversion Program. The pre-trial diversion program is the major source of revenue in this trust fund. The other significant funding source for this trust fund comes from the Cost of Prosecution fee which is \$100 per felony case and \$50 for all other cases prosecuted by this office. This is a court ordered fee. Additional fees may be set by the court if the State Attorney's Office can show proof of higher costs incurred for the prosecution of a particular case. Court operations have returned to pre-pandemic levels. With the increase in cases being handled, the fees collected within this trust fund are also increasing.

Worthless Checks: The State Attorney's Office, 1 Judicial Circuit projects revenue of \$250 for FY 2022-2023 and for FY 2023-2024. The income generated

in this trust fund is not expected to increase. Many businesses use private collection agencies to handle the worthless checks that they receive. In addition, the large number of point-of-sale transactions paid by debit cards has reduced the number of checks that vendors receive. Actual receipts from the last fiscal year were reviewed to project revenues for this fund.

5 Percent State Trust Fund Reserve: JAC Will

Complete

FY 2022-23 Receipts Applicable to SCGR	\$
Less 8% Service Charge	\$
= Receipts Applicable to 5% Assessment	\$
x 5% State Trust Fund Reserve	\$

8 Percent Service Charge to General Revenue: JAC Will

Complete

FY 2023-24 Receipts Applicable to SCGR	\$
x 8% Service Charge	\$
FY 2022-23 Receipts Applicable to SCGR	\$
x 8% Service Charge	\$

Explanation of Schedule I, Section III Accounting Adjustments:

None Applicable.

Schedule I Trust Fund Format

3. Detail of Non-Operating Expenditures:

- Reflects a detailed calculation of the 5 percent trust fund reserve for FY 2024-25 (calculated on recurring FY 2023-24 estimated revenue).
- Reflects a detailed calculation of the 8 percent Service Charge to General Revenue (SCGR) for FY 2023-24 and FY 2024-25 (calculated on recurring FY 2023-24 and FY 2024-25 estimated revenue).

JAC will provide calculations based on applicable estimated receipts. Only receipts coded to revenue categories exempt from the SCGR will be excluded from the calculation.

Schedule I Trust Fund Format

4. Adjustments: Adjustments are items other than revenues, nonoperating, operating and fixed capital outlay appropriations that are necessary in determining the Unreserved Fund Balance for budgetary purposes. Reflected in Section III.

JAC will provide explanations based on any adjusting entries that are made and supported by the accounting records.

Schedule I Section II and III Prior Year Example for SARTF

COL A01 ACT PR YR EXP 2021-22	COL A02 CURR YR EST EXP 2022-23	COL A03 AGY REQUEST FY 2023-24	COL A04 AGY REQ N/R FY 2023-24
-------------------------------------	---------------------------------------	--------------------------------------	--------------------------------------

SECTION II: DETAIL OF NONOPERATING EXPENDITURES

	OBJECT CODE	TRANSFER TO BE	CFDA NO.			
01 8% SERVICE CHARGE TO GENERAL REVENUE	880800			43,013	45,044	46,644
02 5% STATE TRUST FUND RESERVE	999000					25,901
TOTAL TO LINE E IN SECTION IV				43,013	45,044	72,545

SECTION III: ADJUSTMENTS

	OBJECT CODE				
TOTAL TO LINE H IN SECTION IV					



Schedule I Trust Fund Format

5. Summary [Section IV]:

- Line A: Displays the Unreserved Fund Balance as of July 1.
- Line B: Displays the total of Section I: Detail of Revenues.
- Line C: Displays the total funds available (Line A plus Line B).
- Line D: Displays total operating expenditures.
- Line E: Displays the total of Section II: Detail of Nonoperating Expenditures.
- Line F: Displays total fixed capital outlay expenditures.
- Line G: Displays the Unreserved Fund Balance before Adjustments (Line C minus Lines D, E, and F).
- Line H: Displays the total of Section III: Adjustments.
- Line I: Displays the Unreserved Fund Balance as of June 30 (Line G minus Line H).

Schedule I Section IV

Prior Year Example for SARTF

COL A01	COL A02	COL A03	COL A04
ACT PR YR	CURR YR EST	AGY REQUEST	AGY REQ N/R
EXP 2021-22	EXP 2022-23	FY 2023-24	FY 2023-24

JUSTICE ADMINISTRATION	21000000
STATE ATTORNEYS	21500000
PGM: SA JUD CIRCUIT	21500000

FUND: STATE ATTNYS REVENUE TF 2058

SECTION IV: SUMMARY

UNRESERVED FUND BALANCE - JULY 1	(A)	588,856	850,566	507,651	
ADD: REVENUES (FROM SECTION I)	(B)	536,585	563,050	583,050	
TOTAL FUNDS AVAILABLE (LINE A + LINE B)	(C)	1,125,441	1,413,616	1,090,701	
LESS: OPERATING EXPENDITURES	(D)	231,862	860,921	920,921	120,000
LESS: NONOPERATING EXPENDITURES (SECTION II)	(E)	43,013	45,044	72,545	
LESS: FIXED CAPITAL OUTLAY (TOTAL ONLY)	(F)				
UNRESERVED FUND BALANCE - JUNE 30 - BEFORE ADJ	(G)	850,566	507,651	97,235	
NET ADJUSTMENTS (FROM SECTION III)	(H)				
ADJUSTED UNRESERVED FUND BALANCE - JUNE 30	(I)	850,566	507,651	97,235	

Schedule I Trust Fund Format

6. Detail of Unreserved Fund Balance

[Schedule IB]: To identify the funding sources and dollars associated with the Unreserved Fund Balance at the end of the fiscal year.

JAC will complete this section on behalf of all circuits and offices.

Schedule I Schedule IB Prior Year Example for SARTF

COL A01 ACT PR YR EXP 2021-22	COL A02 CURR YR EST EXP 2022-23	COL A03 AGY REQUEST FY 2023-24	COL A04 AGY REQ N/R FY 2023-24
-------------------------------------	---------------------------------------	--------------------------------------	--------------------------------------

SCHEDULE IB: DETAIL OF UNRESERVED FUND BALANCE

	FUNDING SOURCE				
	STATE (S) NONSTATE (N)	RESTRICTED (R) UNRESTRICTED (U)			
01 ARTICLE V TRAFFIC FINES	S	U	152,740	91,161	17,461
02 WORTHLESS CHECKS	S	U	943	563	108
03 COST OF PROSECUTION	S	U	696,655	415,791	79,640
04 CRIMINAL USE OF PERSONAL ID	S	U	228	136	26

ADJUSTED UNRESERVED FUND BALANCE - JUNE 30			850,566	507,651	97,235
			=====		



Schedule I Trust Fund Format

7. Reconciliation of Unreserved Fund Balance [Schedule IC]: The Schedule IC is used to determine the available trust fund balance for budgetary purposes based on the assets and liabilities of the fund.

JAC will complete this form on behalf of all circuits and offices.

Schedule IC Reconciliation of Unreserved Fund Balance

SCHEDULE IC: RECONCILIATION OF UNRESERVED FUND BALANCE

Department Title:	Budget Period: 2024 - 2025
Trust Fund Title:	Justice Administration
Budget Entity:	State Attorney Revenue Trust Fund
LAS/PBS Fund Number:	State Attorneys - 11th Judicial Circuit
	20-2-056003

	Balance as of 6/30/2023	SWFS* Adjustments	Adjusted Balance
Chief Financial Officer's (CFO) Cash Balance	- (A)		-
ADD: Other Cash (See Instructions)		(B)	-
ADD: Investments		(C)	-
ADD: Outstanding Accounts Receivable	- (D)		-
ADD: _____		(E)	-
Total Cash plus Accounts Receivable	- (F)	-	-
LESS: Allowances for Uncollectibles		(G)	-
LESS: Approved "A" Certified Forwards		(H)	-
Approved "B" Certified Forwards		(H)	-
Approved "FCO" Certified Forwards		(H)	-
LESS: Other Accounts Payable (Nonoperating)		(I)	-
LESS: Other Accounts Payable (SCGR)	- (J)		-
Unreserved Fund Balance, 07/01/23	- (K)	-	- **

Notes:

*SWFS = Statewide Financial Statement

** This amount should agree with Line I, Section IV of the Schedule I for the most recent complete year and Line A for the following year.



Schedule I Trust Fund Format

8. Reconciliation: Beginning Trial Balance to Schedule I and IC: The purpose of this form is to reconcile any differences between the agency's beginning trial balance as of July 1 and Line K of the Schedule IC.

JAC will complete this form on behalf of all circuits and offices.



Schedule IC Reconciliation of Beginning Trial Balance to Schedule I and IC

RECONCILIATION: BEGINNING TRIAL BALANCE TO SCHEDULE I and IC

Budget Period: 2024-25
Department Title: Justice Administration
Trust Fund Title: State Attorneys Revenue Trust Fund
Budget Entity: State Attorneys - T Judicial Circuit
LAS/PBS Fund Number: 20-2-05

BEGINNING TRIAL BALANCE:

Total Fund Balance Per FLAIR Trial Balance, 07/01/23

Total all GLC's 5XXXX for governmental funds; (A)
 GLC 539XX for proprietary and fiduciary funds

Subtract Nonspendable Fund Balance (GLC 56XXX) (B)

Add/Subtract Statewide Financial Statement (SWFS) Adjustments :

SWFS Adjustment # and Description (C)

SWFS Adjustment # and Description (C)

Add/Subtract Other Adjustment(s):

Approved "B" Carry Forward (Encumbrances) per LAS/PBS (D)

Approved FCO Certified Forward per LAS/PBS (D)

Adjustment: CY Certified Forward Reversions (D)

(D)

(D)

(D)

ADJUSTED BEGINNING TRIAL BALANCE: **0.00** (E)

UNRESERVED FUND BALANCE, SCHEDULE IC (Line K) **0.00** (F)

DIFFERENCE: **0.00** (G)*

*SHOULD EQUAL ZERO.



Schedule I Trust Fund Format

9. Inter-Agency Transfers Reported on Schedule I: Inter-agency transfers from/to a specific fund totaling \$100,000 or more must be confirmed with the corresponding sending/receiving agency.

**Executive Office of the Governor
Inter-Agency Transfers Reported on Schedule I**

Agency Name: JAC /State Attorney Office- Judicial Circuit

List all transfers totaling \$100,000 or more. Provide the applicable agency name and fund number, the categories used for both the transfer in and the transfer out, and the amount of the transfer for each of the fiscal years indicated, as well as the name of the person at the other agency who confirmed the amount of the transfer and the date of the confirmation. If transferred in/out to the General Revenue Fund, do not include on this form; however, on Schedule I be sure to include "To GR" or "From GR" in the description field.

Fund Name and Number : Grants and Donations Trust Fund 20 2 339013

Transfers In (Provide Agency and Fund Number Received From)	Transfer In Revenue Category	Amount	Amount	Amount	Transfer Out Expenditure Category	Confirmed By/Date
		FY 21-22 (A01)	FY 22-23 (A02)	FY 23-24 (A03)		
Department of Legal Affairs FID #2261	001510	\$ 266,980.37	\$ 260,533.00	\$ 286,412.00	104133	Sarah Nortelus 9/21/2022

Unreserved Fund Balance

The Unreserved Fund Balance is the summation of prior year's unreserved fund balance that was brought forward into the current period plus total cash on hand plus estimated receipts, minus actual disbursements and outstanding obligated expenditures for which a disbursement has not yet been made.

The Unreserved Fund Balance is only calculated and used in the preparation of the annual LBR Trust Fund Schedule series of reports, and is not the same total as the cash balance.



Negative Unreserved Fund Balances On the Schedule I Report

In current or LBR request fiscal year, the estimated receipts combined with the prior year carry forward unreserved fund balance amount must be sufficient to support the total estimated operating and non-operating expenditures/budget authority as noted on Lines “D” and “E” of the Schedule I Report.

A negative unreserved fund balance can be eliminated by either:

- A. Increasing the estimated receipts (where feasible) or
- B. Reducing estimated expenditures/budget authority before final submission into LASPBS and upload of the Schedule I Reports to the Florida Fiscal Portal.



Eliminate Negative Unreserved Fund Balances On The Schedule I Report

OPTION A: Increase Estimated Receipts (Revenue)

For the current FY or LBR Request Year, increases in receipts can only be made if the amount can be substantiated by contracts, memorandums of agreements or reasonable projections.

All receipt projections must be justified in the Schedule I narrative document which provides the methodology as to how the estimated figures were determined.

Eliminate Negative Unreserved Fund Balances On The Schedule I Report

OPTION B: Decrease Expenditures/Budget Authority

If the decrease is for the current year, notify JAC of the exact amount to reduce and a line item adjustment called “UNFUNDED BUDGET” will be entered in Section II. This will in effect reduce Line “D” [estimated expenditures /budget authority] for purposes of balancing the Schedule I Report only. An agency’s actual current year budget authority will not be reduced by this action.

If the decrease is for the request year, then an LBR issue should be considered requesting the deletion or reduction in budget authority that is not supported with sufficient estimated receipts or that is no longer needed.

E-Mail Certification of Estimated Receipts For FYs 2023-2024 and 2024-2025

Each Office is required to send an email certifying the estimated receipts to Laurie Harrison at the Governor's Office of Policy and Budget Trust Fund Unit, after Friday, September 15, 2023 during the OPB Technical Review period which will be sometime shortly after the LBR original submission date.

Laurie's email address is:

laurie.harrison@laspbs.state.fl.us. Please copy the JAC Budget Office: budget@justiceadmin.org

Please do not send email before Friday, September 15th



E-Mail Certification of Estimated Receipts For FYs 2023-2024 and 2024-2025

Example Language for email is as follows:

“Dear Ms. Harrison,
The State Attorney, _____Judicial Circuit confirms that the estimated receipts as reported on the Trust Fund Schedule 1 document are the most accurate figures based on available information at the time of submission of the FY 2024-25 Legislative Budget Request. This office will notify the OPB Trust Fund Unit if any significant changes in revenue estimates occur prior to the issuance of the Governor’s Budget Recommendations.”



Long Range Program Plan

Mission Statement

Performance Measures

Standards

Trends & Conditions

Goals

SWOT

Activities

Outcomes

Outputs

Services

Objectives

Unit Cost



Long Range Program Plan

Bridget Kiefer and Donna Seibert
will coordinate with each SAO in the
compilation of the required statistical
data.



LRPP Due Date To JAC

* New Download Procedure *



All LRPP schedules and exhibits are due to the JAC Budget Office by Friday, August 18, 2023 at 6:00 P.M. EDT.

State Attorney Internal Submission Date to Bridget and Donna : by Friday, August 4, 2023

- **Download LRPP Templates from MyJAC**
- **Upload all completed LRPP documents to the Pydio 'Completed' Budget Folder like last year.**
- Email the Budget Office at Budget@justiceadmin.org to confirm that the information has been uploaded.
- If you do not hear from the JAC Budget Office within two business days to confirm submission, please email us again.

LRPP Publication Due Date

All completed LRPP exhibits and schedules must be uploaded to the Florida Fiscal Portal by September 29, 2023.

Written notification (usually by email) must be provided from JAC to Legislative staff and the Governor's Office.



Please Help Us To Better Serve You



Carefully review the data that you are submitting in your LBR and LRPP packages and refer to the Checklist.

Use the MyJAC to download and Pydio Budget Folder to upload all forms, schedules, exhibits and supporting documents electronically. This will ensure receipt directly to all staff in the JAC Budget Office.



Complete and submit all documents within the time frames requested to avoid delays in processing and uploading to the Florida Fiscal Portal.

Budget Office Contact Information



Email Addresses:

PRIMARY: budget@justiceadmin.org

Staff:

Mailea Adams

Mailea.Adams@justiceadmin.org

Kelly Jeffries

Kelly.Jeffries@justiceadmin.org

Adam Preisser

Adam.Preisser@justiceadmin.org

Phone Number: 850.488.2415

Dates to Remember



- July 28, 2023: Budget Office deadline for agency LBR document submission.
 - ✓ September 15, 2023: Deadline for Department LBR upload to Florida Fiscal Portal by JAC.
- August 18, 2023: Budget Office deadline for agency LRPP document submission.
 - ✓ September 29, 2023: Deadline for Department LRPP upload to Florida Fiscal Portal by JAC.

Open Discussion





Uploading Documents to Pydio

For Budget Folder Use Only

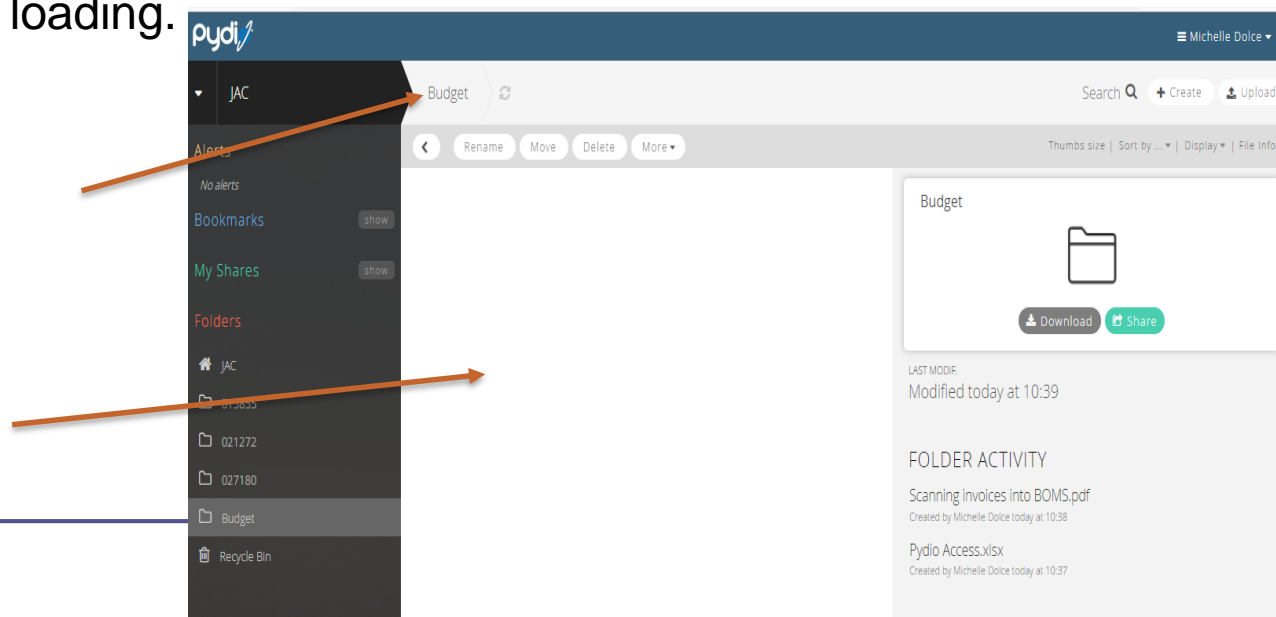
Uploading to Pydio

- There are two ways to upload documents into Pydio:
- Drag and drop into the space in the middle of the screen.
 - Use the Upload button on the upper right-hand side of the screen.

Both accomplish the same thing.

Loading Using Drag and Drop

1. In Windows Explorer open the folder where your document(s) are stored.
2. In Pydio double click on the Budget folder within your workspace. **Make sure it says Budget at the top.**
3. Select the documents from Windows Explorer and **drag them into the center of your Pydio screen.** Display view is most useful for this option.
4. A window will appear showing what is being loaded.
5. Wait a moment for the documents to display in your folder to confirm it's finished loading.



Loading Using the Upload Button

1. In Windows Explorer open the folder where your document(s) are stored.
2. In Pydio double click on the Budget folder within your workspace. Make sure it says Budget at the top.
3. In the **upper left-hand corner of the Pydio screen select the Upload button.** A window will appear.
4. **Drag your documents into that window.**
5. Wait a moment for the documents to display in your folder to confirm it's finished loading.

