OFM Agency Request Analysis

After an Agency Request Legislation is submitted to the Office of Financial Management (OFM), an analysis is created by the Executive Administrator and reviewed prior to setting up the assignments for the analysis. Once the analysis is complete the Agency Request Legislation with Analysis can then be submitted by the Executive Administrator to the Governor's office for approval.

✓ The OFM Executive Administrator can create, delete, update status, review, assign, complete and submit an analysis depending on the status of the Agency Request Analysis in process

✓ Prior to the start of the session, the OFM Executive Administrator can manage the list of required element questions contained in the agency request legislation, so the list can be tailored to the specific needs of the governor's office for the legislative session.

✓ The OFM Executive Administrator can also manage the list of other users that can either be auto assigned or manually assigned to the analysis of any givThe workflow for the Analysis of an Agency Request is covered in the OFM Analysis of Agency Request Legislation (Assignee Process) Job Aid.

To create a user account for BEARS, complete the BEARS Security Request form for OFM/Governor's Office for the application. Keep in mind only one role can be assigned per user, information on roles and permissions can be found in the Roles and Permissions Guide.

✓ BEARS can be accessed using Chrome, Firefox, or Microsoft Edge. Access BEARS application.

✓ For more information about BEARS and training materials, please visit the BEARS web page.

✓ For additional information about BEARS or becoming a BEARS user, contact the OFM Help Desk.

HereToHelp@ofm.wa.gov **360.407.9100**

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Landing Screen

When an OFM Executive Administrator logs into BEARS, the landing screen provides the following information:
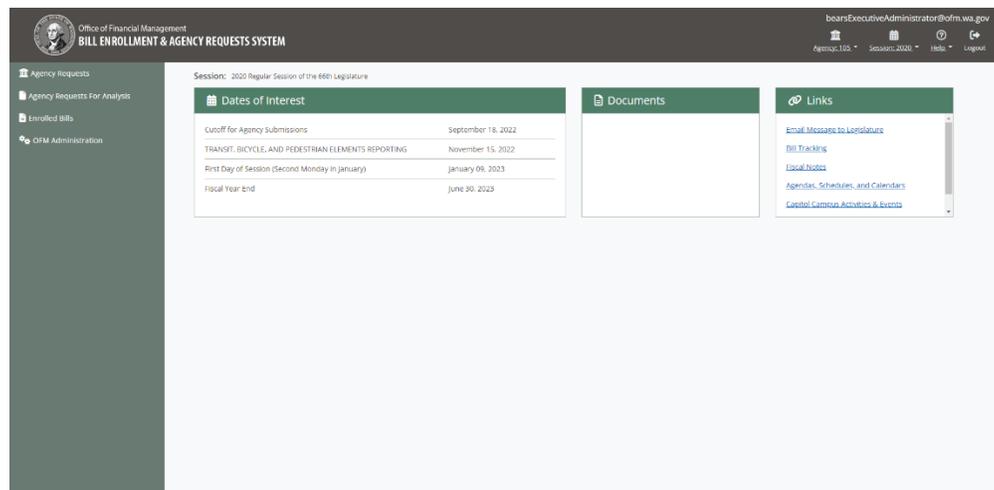
- Toolbar - Located near the top of all pages
    - Agency – the agency assigned
    - Session – Current legislative session (In the future a drop down containing past sessions as view only for research purposes will be provided)
    - Help – Help provides the phone number and an email link to contact the OFM Helpdesk

- Sidebar or Left side Navigation - Populates with workflow components based on where the user is in the process

- Page Header – Session always populates, with Agency Request ID - Title (Request Status) and Analysis (Analysis Status) populated after an analysis is created

- Dates of Interest, Documents and Links

Important: For updates to the content displayed on the Landing Screen, please submit a help desk ticket with the proposed changes. For documents it is recommended that a link to the document stored in a static location be provided versus the document itself.

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Important: An Executive Administrator can only create a new analysis for an Agency Request with a Request
Status of Pending or Revision Requested and no analysis previously created.

Agency Request for Analysis (List) Screen

The **Agency Request for Analysis** (List) Screen can include all the Agency Requests in the following sortable columns:

- Department Request # – Manually entered by OFM

- Agency – Agency number and name

- Agency Request Title – Agency Request Title entered when the Agency Request was created

- Request Status – The status of the Agency Request in process

- Analysis – Name of the analysis created for the Agency Request

- Analysis Status – Status of the analysis in process

- Governor's Decision – Approved or Denied

Important: An Executive Administrator can only create a new analysis for an Agency Request with a Request Status of Pending or Revision Requested and no analysis previously created.

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1. View/Edit:

To create an analysis for an Agency Request, log in as an OFM Executive Administrator, navigate to **Agency Requests for Analysis** (list) screen via the left side navigation

➔ Check the box next to a Agency Request with a Request Status of Pending or Revision Requested

➔ Select the **View/Edit** button (Shortcut Key: alt+shift+m)

➔ Navigate to the **Analysis Information** screen for the Agency Request selected

Note: if any analysis already exists for an Agency Request use the **View/Edit** button (alt+shift+m) to access the Agency Request. The following statuses are be locked for editing:

- Gov's Review
- Withdrawn
- Returned
- Decision Made

	Department Re...	Agency	Agency Reques...	Request Status	Status Change ...	Analysis	Analysis Status	Governor's Deci...
☐	0001-999	105 - Office of Financi...	test	OFM Review	05/23/2022, 03:20 PM	test	Pending	
☐	1111-116	105 - Office of Financi...	test	OFM Review	05/10/2022, 10:26 AM	test	In Review	
☐	1111-111	105 - Office of Financi...	Janice test 99699 email	Decision Made	05/05/2022, 03:36 PM	Janice test 99699 email	Complete	Approved
☑		105 - Office of Financi...	test	Pending	05/24/2022, 03:28 PM			

Session: 2020 Regular Session of the 66th Legislature

Agency Requests For Analysis   Z Z-Draft   Reports   View/Edit   Delete

Rows: 4

🔒 Analysis is locked from editing: Agency request status is Withdrawn   ✕

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2. Z-Draft:

To update the Z-Draft Number anytime during the Agency Request for Analysis process:

➔ Select the Agency Request on the **Agency Requests for Analysis** (list) Screen and select on the **Z-Draft** button (alt+shift+z)

➔ Enter the new Z-Draft number in the pop-up provided. If the format is incorrect the following validation error is provided:

"The Final Z-Draft Number must be entered using Z followed by a dash, then a four digit number from 0001 to 9999 followed by a period followed by a one to three digit number from 1 to 999."

➔ Edit Z-Draft Confirmation:

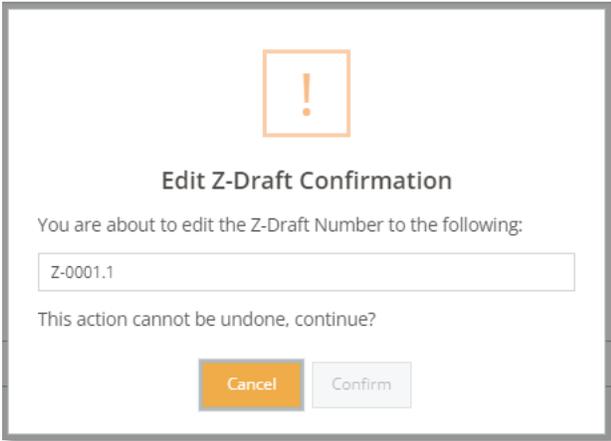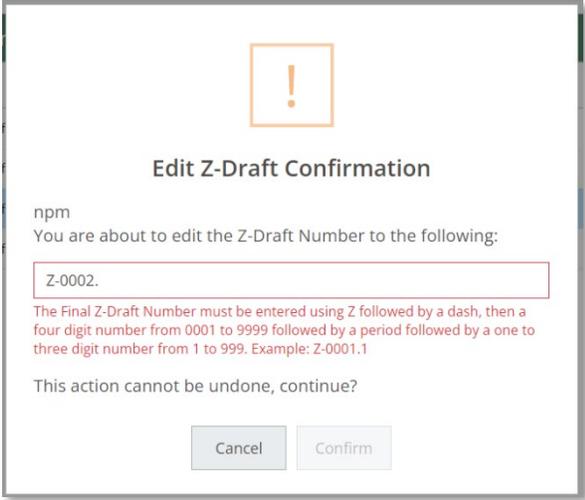"You are about to edit the Z-Draft Number to the following:

(Text field to enter new Z-Draft Number)

This cannot be undone, continue?"

Followed by:

- Cancel – Cancel navigates back to the **Agency Requests for Analysis** (list) screen with no changes

- Confirm – Confirm updates the Z-Draft number to the new number and provide a successful save message

Z Z-Draft

Edit Z-Draft Confirmation

npm
You are about to edit the Z-Draft Number to the following:

Z-0002.

The Final Z-Draft Number must be entered using Z followed by a dash, then a four digit number from 0001 to 9999 followed by a period followed by a one to three digit number from 1 to 999. Example: Z-0001.1

This action cannot be undone, continue?

Cancel   Confirm

Edit Z-Draft Confirmation

You are about to edit the Z-Draft Number to the following:

Z-0001.1

This action cannot be undone, continue?

Cancel   Confirm

Z-Draft Number successfully saved.   ×

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Create Agency Request Analysis

1. **Select:**

➜ The **Agency Request Information** Screen contains all of the information from the review screen for the Agency Request, including:

- General Information
- Stakeholders
- Agency Contacts
- Required Elements
- Attachments

➜ After a review of the Agency Request information, the **Executive Adminstrator** can select the **Create Analysis** button (alt+shift+m) and navigate to the **Analysis Information** Screen
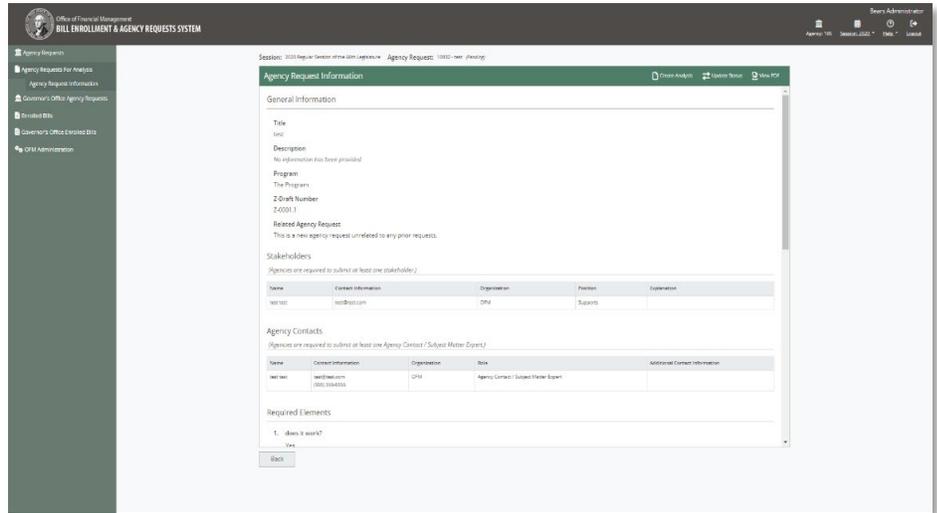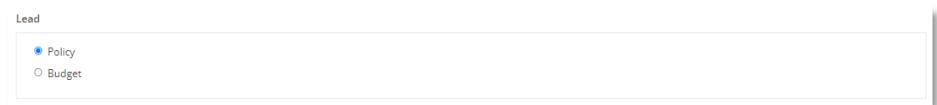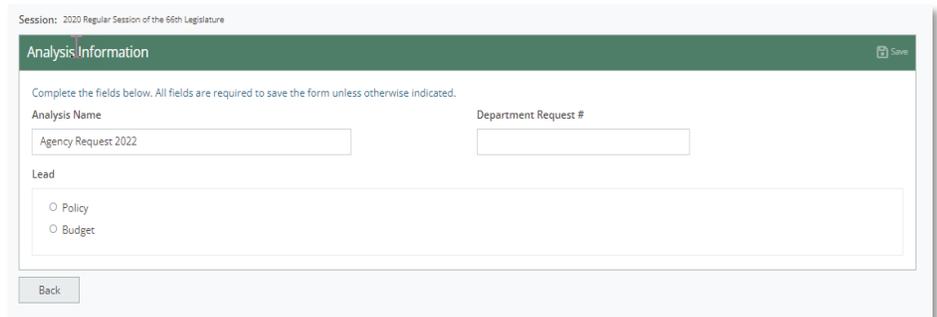
2. **Create Analysis:**

➜ The **Analysis Information** Screen populates the **Analysis Name** field with the name of the Agency Request selected, it can then be edited

➜ The **Department Request #** must be entered manually with a format of xxxx-xxx, character limit is 8 including the hyphen

➜ Based on the nature of the Agency Request the **Lead** is designated as Policy or Budget by selecting the **Policy** or **Budget** radio button

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3. Save (unsuccessful):

If the **Analysis Name or Department Request #** is not entered, on save the following validation is provided:

"The following fields have missing/invalid entries:

- Analysis Name is required.

- The Department Request Number is required.

The validation messages of "Analysis Name is required." and "The Department Request Number is required." are presented under the text boxes provided

4. Save (successful):

After completing the required Analysis Information select on the **Save** button (alt+shift+s) and the following message will be provided:

"Analysis {Name of Analysis} for {Title of Agency Request} successfully saved."

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3. **Delete Analysis:**

➔ Check the box next to an Agency Request with one of the following statuses:

- Pending,
- OFM Review,
- Revision Requested,
- Withdraw Requested

➔ Then select the **Delete** button (alt+shift+x)

➔ The following confirmation is presented:

"You are about to delete {Name of File} and any analysis that may be associated to this request. This action cannot be undone, continue?"
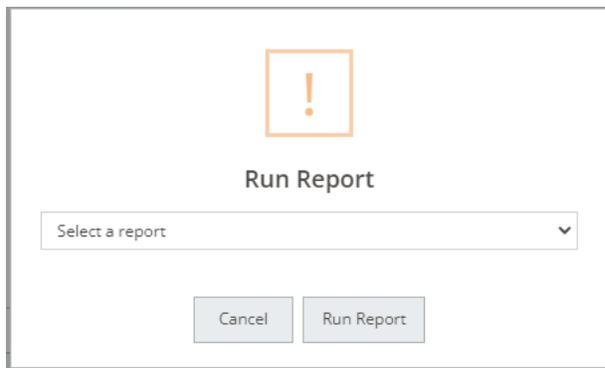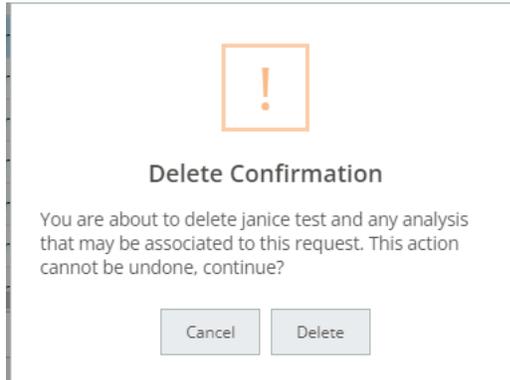
- Cancel – takes the user back to the screen without changes

- Delete – removes the Agency Request from the list and the database and provides the following message:

"Agency request {Name of File} successfully deleted."

🗑 Delete

Delete Confirmation

You are about to delete janice test and any analysis that may be associated to this request. This action cannot be undone, continue?

Cancel   Delete

Agency request Test June 1 successfully deleted.

4. **Reports:**

➔ Select the **Reports** button (alt+shift+d) and select a report from the dropdown list of reports provided:

- Agency Request FULL

- Departmental Request Recommendations – Agency Request

- Governor's Executive Summary – Agency Request

📄 Reports

Run Report

Select a report   ⌄

Cancel   Run Report

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Update Status

1. Update Status:

The status of an Agency Request can be updated without creating an analysis

➔ Select the **Update Status** button (alt+shift+u) on the **Agency Request Information** Screen

➔ Navigate to the **Update Status** Screen and select one of the following:

- Revision Requested
- Withdrawn Requested
- Returned

Then enter a **Reason for Request** in the text box provided

2. Save (unsucessful):

If the **Reason for Request** has not been entered on save the following validation is provided:

"The following fields have missing/invalid entries:

- Reason for Request is required"

The validation message of "Reason for Request is required" is presented under the text box provided

⇄ Update Status

Session: 2020 Regular Session of the 66th Legislature

Update Status   🖫 Save

Complete the fields below. All fields are required to save the form unless otherwise indicated.

Agency Request Title
test

Agency Request Status

○ Revision Requested
○ Withdrawn Requested
○ Returned

Reason for Request

[   ]

[Back] [Continue]

Update Status   🖫 Save

The following fields have missing/invalid entries:
- Reason for Request is required

Complete the fields below. All fields are required to save the form unless otherwise indicated.

Agency Request Title
test

Agency Request Status

○ Revision Requested
○ Withdrawn Requested
● Returned

Reason for Request

[   ]

Reason for Request is required

[Back] [Continue]

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3. Save (successful):

After an **Agency Request Status** has been selected and and a **Reason for Request** provided

➔Select the **Save** button (alt+shift+s) and receive the following confirmation:

"Update Status Confirmation

Are you sure you want to update the status to {Agency Request Status}? Click here to generate the email and Update Status or Cancel to return to the page."

- Cancel – Returns to the Update Status page with no changes
- Update – Updates the Status of the Agency Request and creates an email notification to edit before sending.

➔Once the Agency Request Status is updated successfully the following message is provided:

"Agency request status for {name of Agency Request} successfully updated."

Session: 2020 Regular Session of the 66th Legislature

Update Status   💾 Save

Complete the fields below. All fields are required to save the form unless otherwise indicated.

Agency Request Title
test

Agency Request Status
- ● Revision Requested
- ○ Withdrawn Requested
- ○ Returned

Reason for Request
This is a reason.

[Back] [Continue]

!

Update Status Confirmation

Are you sure you want to update the status to Withdrawn Requested? Click here to generate the email and Update Status or Cancel to return to the page.

[Cancel] [Update]

Agency request status for agency request June 21 successfully updated.

Assignments

1. View Assignments:

➔ navigate to **Assignments (**list) Screen via the **Continue** button at the bottom of the **Analysis Information** Screen or the left side navigation

➔ The the list provides the following columns:

- Assignee
- Assignment Status
- Budget/Policy
- Preparer
- Reviewer
- Analysis Assignment
- Assignee Role
- Due Date

➔ The Assignees visible in the list are those that were auto-assigned (see the OFM Administration - Manage Assigments for more information) when the analysis was created OR manually added to the analysis.

➔ The assignees auto-assigned that are budget analysts or policy advisors will be originally designated with a preparer/reviewer role and there role will need to be updated by editing those assignees to select the appropriate Preparer or Reviewer role.

➔ The numbers displays in the Preparer and Reviewer column reflect the total count of analysis assigned to the Analyst/Advisor as the Reviewer and/or Preparer for agency requests.

Assignee	Assignment Status	Budget/Policy	Preparer	Reviewer	Analysis Assignments	Assignee Role	Due Date
Michelle Marrs	Complete	Policy Advisor	①		Analysis Details, Fiscal ...	Preparer	08/29/2022
Anna Lising	Assigned	Policy Advisor		③	Analysis Details	Reviewer	09/27/2022
Anna Minor	Assigned	Budget Analyst		①	Analysis Details	Reviewer	09/27/2022
Cheri Keller	Not Assigned				Analysis Details	SBA Reviewer	
Ro Marcus	Not Assigned				Analysis Details, Revie...	Legal Reviewer	
Scott Merriman	Not Assigned				Review/Edit Analysis	Legislative Director Re...	
Bears Executive R...	Not Assigned				Review/Edit Analysis	Policy Director Reviewer	

Rows **7**

> **Important:** The assign button will override the specified notification order and set the assignee to an assigned status and send the assignment notification regardless of where in the process the analysis is.

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2. New Assignment:

➔ Select the **New Assignment** button (alt+shift+n) at the top of the **Assignments (List) Screen**

➔On the Assignments Screen select an Assignee from the Email dropdown, the Full Name and Phone Number will populate by OFM identity

Note: If you do not see the person you want to add in the dropdown, put in a help desk ticket to add the assignee, please include their role, and whether they should be set to auto assign.

➔ Select an **Assignee Role** from the following dropdown menu:

- Legal Reviewer
- Legislative Director Reviewer
- Policy Director Reviewer
- Preparer
- SBA Reviewer

➔ Select the Select All checkbox, or one or some Assignment(s) from the list:

- Analysis Details
- Analysis Recommendations
- Emergency Clause
- Fiscal Impact Information
- Other Impacts
- Revenue and Expenditure Estimates
- Review/Edit Analysis
- Stakeholder

➔ Due date is optional

3. Save (Successful):

After the assignment is completed, select the **Save** button (alt+shift+s) and the following message will be provided:

"Assignee successfully saved."

Note: If the Assignee is a Budget Analyst or Policy Advisor the count of Assignments for that role across all Agency Requests for the session will populate on the **Assignments list Screen**
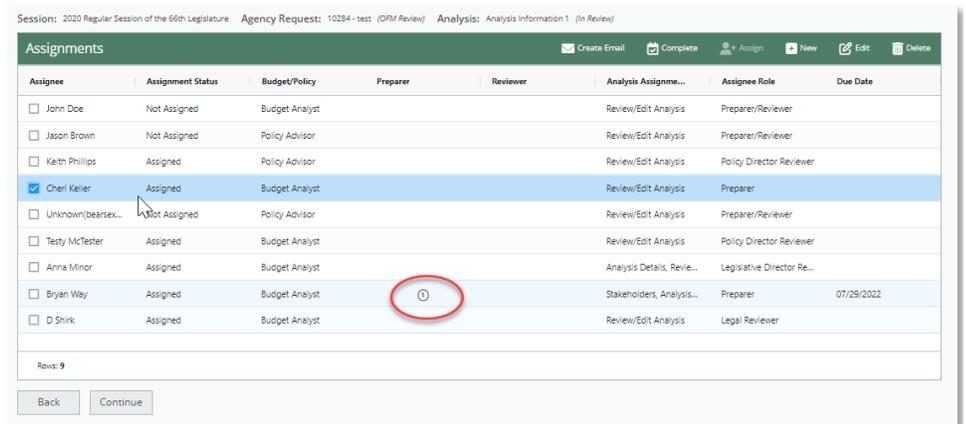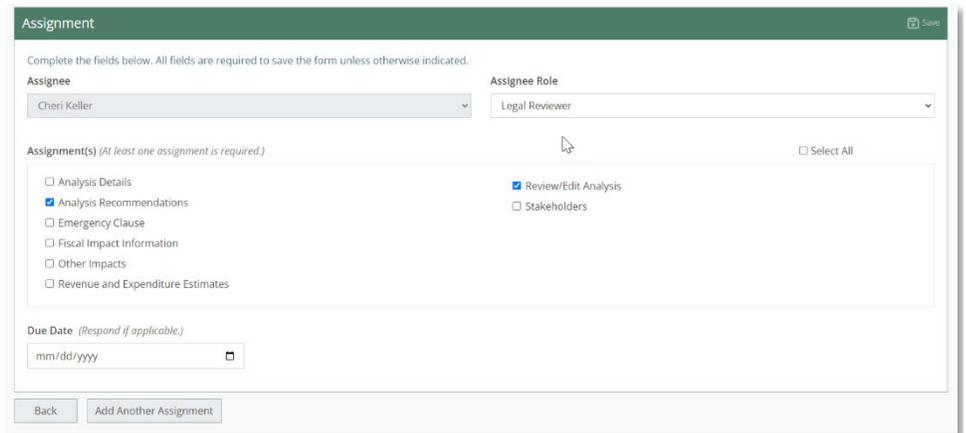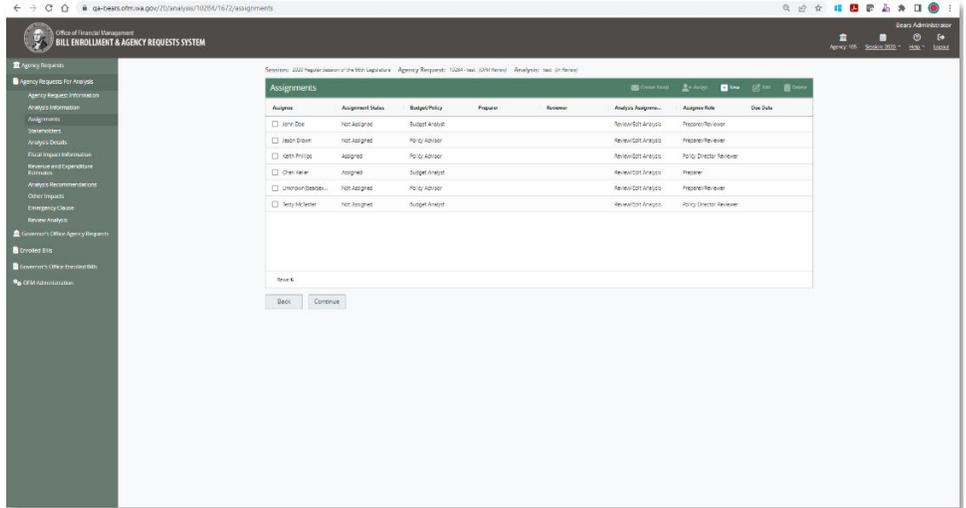
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4. Role Selection Validation:

➔ Move away from the Assignee Role drop-down menu without selecting a role and the following validation message is presented:

"Assignee Role is required."

5. Assignment:

➔ Select an Assignment from the list of assignments. The list of assignments defaults to **Review/Edit Analysis**, keep this selection or select the checkbox by one of the other Assignments. At least one assignment is required.

➔ Move away from the Assignment(s) field without selecting a checkbox and the following validation message is presented:

"At least one Assignment is required."

6. Due Date:

A due date is not required to save the assignment. If a due date is entered it will be included in the email sent to notifying the Assignee of the initial assignment and an email will also be sent to the Assignee once the assignment is overdue.
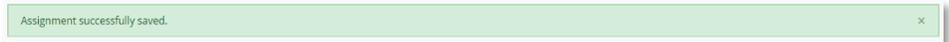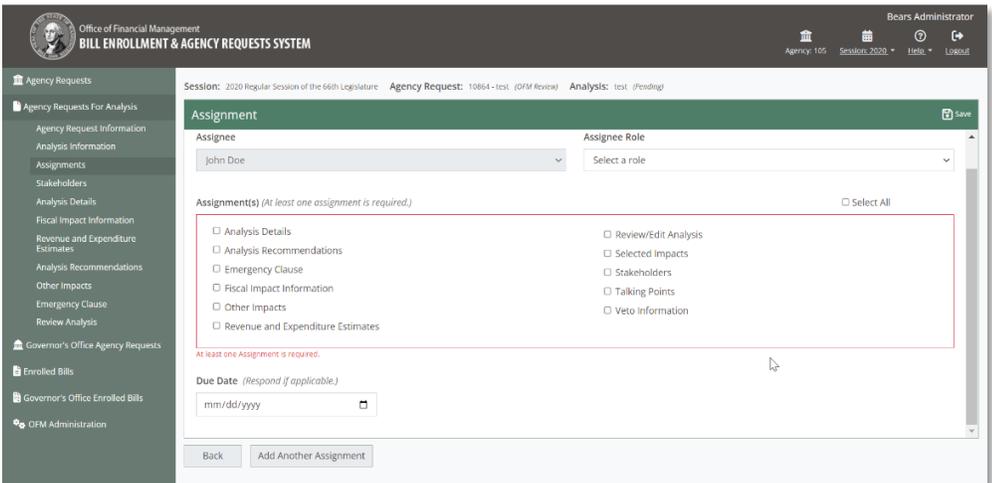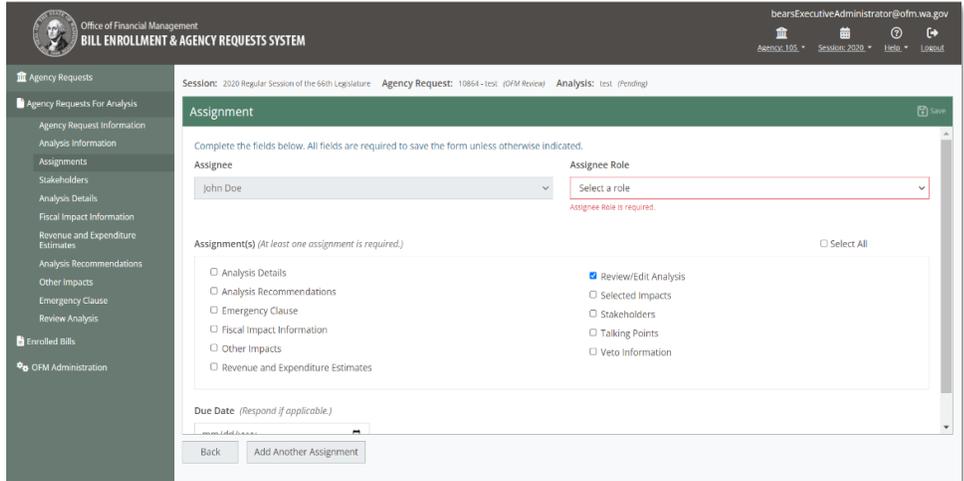
7. Save (successful):

After making a selection of one or more Assignments select the **Save** button (alt+shift+s)

8. Add Another Assignment:

After the assignments are saved the Add another assignment button will be available at the bottom of the screen.

➔ Select the Add Another Assignment button to add another assigment for the Assignee selected

Important: When an assignment record is created/edited and saved, IF they are provided the role of "Preparer" or "Reviewer" their assignment status will be updated to assigned and an email notification of the assignment will be sent, other roles will **NOT** be set to Assigned and receive notification until the prior assignments have been completed.

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9. Edit Assignment:

➔ Select the Checkbox for the Assignee and then select the **Edit** button (alt+shift+m)

Note: When any assignment that is already set to an "Assigned" or "Overdue" status is edited and save the assignment notification will be resent.

10. Create Email:

➔ Select the Checkbox for the Assignee and select the **Create Email** button (alt+shift+e) this creates an email for the Assignee that can be edited in Outlook before sending it

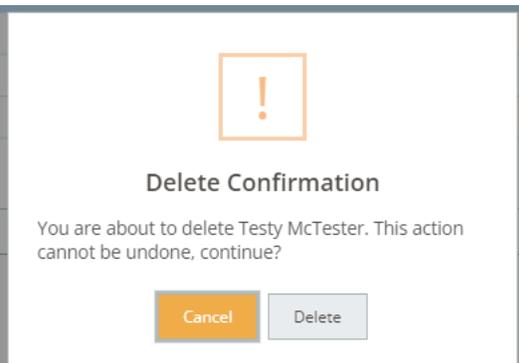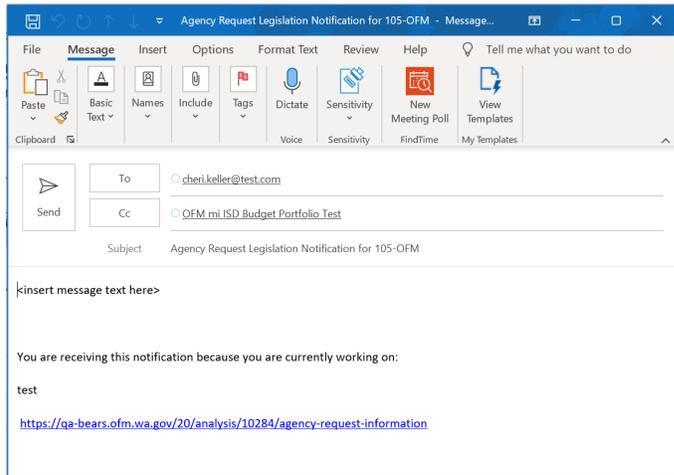**11. Delete Assignment:**

Check the box next to an Assignee:

➔ Select the **Delete** button (alt+shift+x)

➔ The following confirmation is presented:

"You are about to delete {Name of Assignee}This action cannot be undone, continue?"

- **Cancel** – takes the user back to the screen without changes

- **Delete** – removes the Assignee from the list and provides the following message:

"Assignee {Name of Assignee} successfully deleted."

Important: Any auto-assignees that are **NOT** going to be assigned to the analysis will need be deleted for the assignment notification order to work as intended or they could inadvertently be updated to assigned and sent a notification.

12. **Assign Button:**

➔ Using the the Assign button will update any assignee to an Assigned status and immediately send an assignment notification to them.
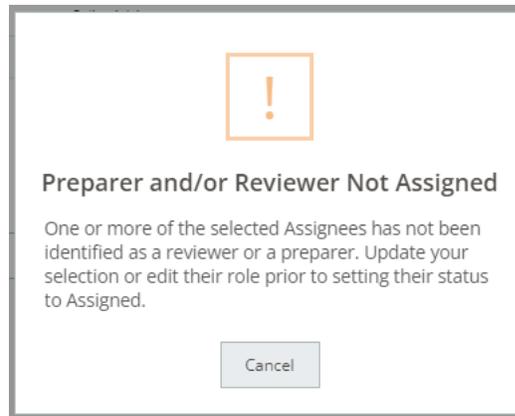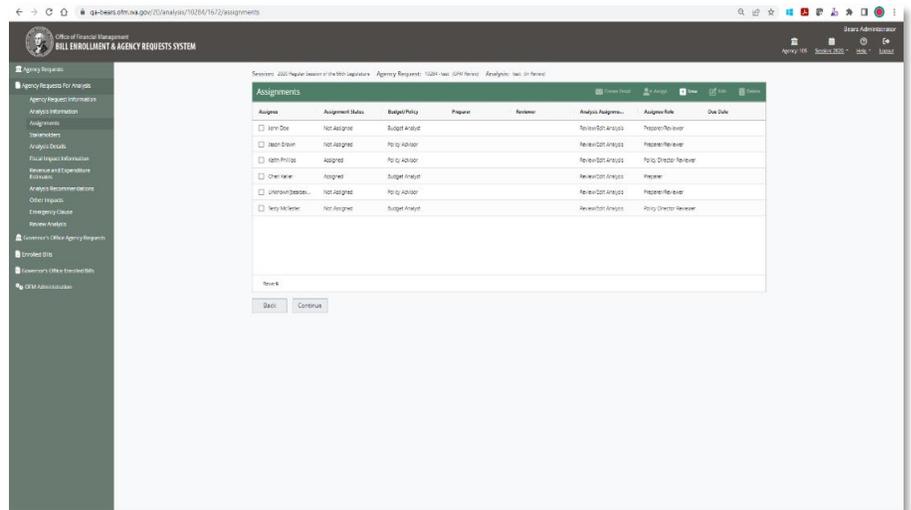
➔ Select an Assignee in the list with the Preparer/Reviewer Assignee Role and select the **Assign** button (alt+shift+g),the following warning will be provided:

"Preparer and/or Reviewer Not Assigned

One or more of the selected Assignees has not been identified as a reviewer or a preparer. Update your selection or edit their role prior to setting their status to Assigned."

- Cancel – to return to the Assignments (List) Screen

Important: Assignees with the Assignee Role of Preparer/Reviewer must edited and given a valid Assignee Role before they can be assigned to an Analysis

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13. **Complete Assignments:**

If any of the assignments for the analysis are incomplete the following warning will be provided oin the **Review** Screen validation summary:

"Assignments – Warning Not all Assignments are completed."

➔ Follow the link to the **Assignments** Screen or select the Assigments **Update** button and select the checkbox next the Assignee with a status of Assigned

➔ select the **Complete** button (alt+shift+c) on the Assignments Screen

The following message will be provided:

"Assignment(s) successfully completed."

Note: Refresh the screen to update the Assignment Status on the Assignments Screen

The following sections have missing/invalid entries:
- Assignments - Warning: Not all assignments are completed.

Session: 2020 Regular Session of the 66th Legislature   Agency Request: 12024 - July 7 Agency Request *(Revision Requested)*   Analysis: July 7 Agency Request *(In Review)*

Assignments   Create Email | Complete | Assign | New | Edit | Delete

	Assignee	Assignment Status	Budget/Policy	Preparer	Reviewer	Analysis Assignme...	Assignee Role	Due Date
☐	John Doe	Complete	Budget Analyst			Review/Edit Analysis	Reviewer	
☐	Jason Brown	Complete	Policy Advisor			Review/Edit Analysis	Legal Reviewer	
☐	Keith Phillips	Complete	Policy Advisor			Analysis Details, Revie...	Preparer	
☐	Cheri Keller	Complete	Budget Analyst			Review/Edit Analysis	SBA Reviewer	
☑	Testy McTester	Assigned	Budget Analyst			Analysis Details	Policy Director Reviewer	

Rows: 5

[Back] [Continue]

[✓ Complete]

Assignment(s) successfully completed.   ×

Assignment Statuses:

- Not Assigned: Assignment created by auto-assign for the analysis OR assignment that is NOT a "Preparer" or "Reviewer" that is awaiting assignment via the process of prior assignments being completed
- Assigned: New or edited Assignment with role of Preparer or Reviewer for the analysis (notification sent) OR assignees that have been updated to an "Assigned" status based on prior assignments being completed
- Overdue: Assignment is past the due date set (notification sent)
- Complete: Analysis complete

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14. **Assignment Notifications:**

➔ Assignments where the role is set to "Preparer" or "Reviewer" will be immediately assigned and sent a notification.

➔ Reviewer will receive secondary assignment notification when the last remaining assignee with role of "Preparer" completes their assignment

➔ When the last remaining assignee with role of "Reviewer" completes their assignment the next role in the list will be assigned and this is the order that will be used:

- SBA Reviewer
- Policy Director Reviewer
- Legal Reviewer
- Legislative Director Reviewer

Note: The assignment notification will include a bulleted list of completed assignments for the analysis.

Example of the Assignment email notification prior to any assignments being completed:

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1. Manage Assignments:

Navigate to the **Manage Assignments Screen** under OFM Administration

➔ **Edit Assignments:**

Select the checkbox next to an assignee in the list and click on the **Edit button** (alt+shift+m)

On the **Assignment Screen** the following can be selected:

Assignee Role Dropdown:

- Legal Reviewer
- Legislative Director Reviewer
- Policy Director Reviewer
- Preparer/Reviewer
- SBA Reviewer

Budget Analyst/Policy Advisor Radio Buttons:

- Budget Analyst
- Policy Advisor

➔ **Navigate:**

Use the **Back** button to return to the **Manage Assignments Screen** in the future the Add another Assignment Screen will allow you to select another assignee to the list of available assignees

➔ **Auto-Assign:**

On the the **Manage Assignments Screen** select the checkbox next to an assignee in the list and click on the **Auto-Assign** button (alt+shift+u) to flag the the assignee to auto-assign Yes/No (Information viewable in the Auto-Assign Column)

Note: A Budget Analyst or Policy Advisor can only be designated IF the selected Assignee Role is "Preparer/Reviewer"

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2. Manage Required Element Questions:

Navigate to the **Manage Required Element Questions Screen** under OFM Administration
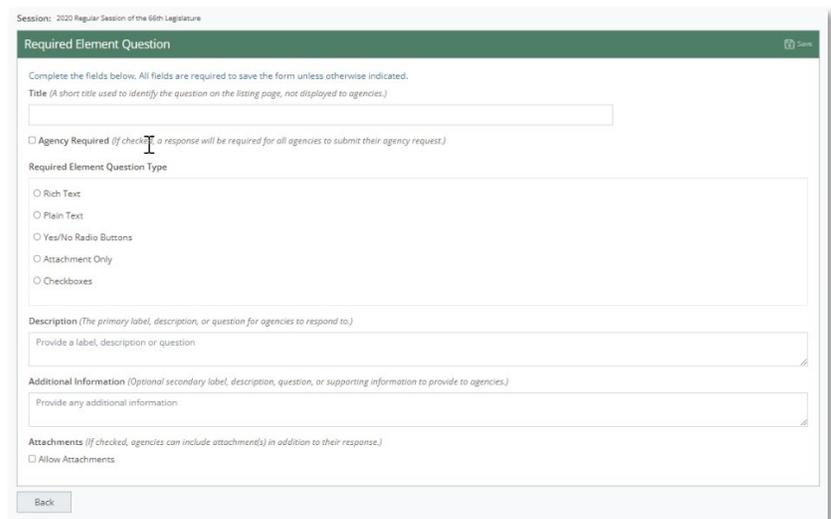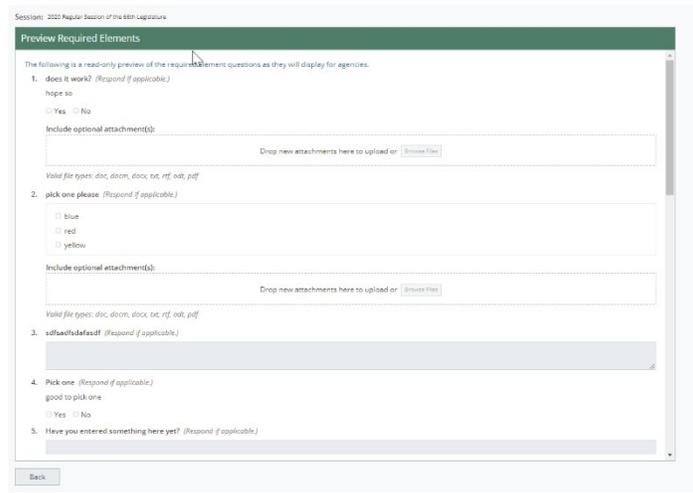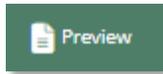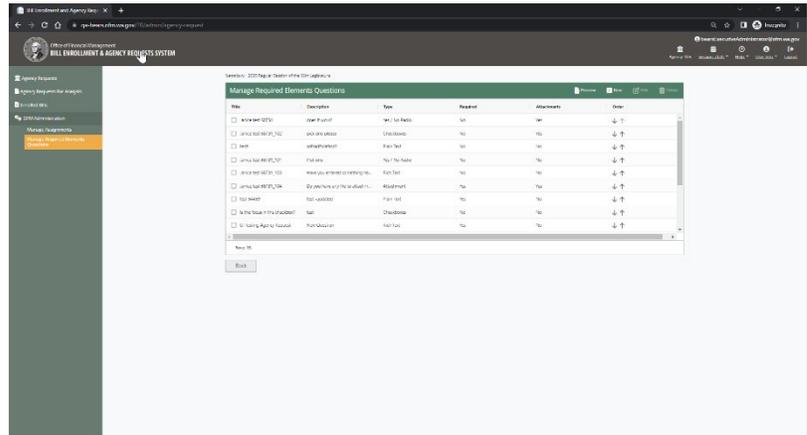

➔ Preview:

Select the **Preview** button (alt+shift+v) to view the Required Element Questions as they will appear to BEARS users

- Select the **Back** button to return to the **Manage Required Element Questions Screen**

➔ New:

Select the **New** button (alt+shift+n) to add a new Required Element Question

Complete the fields on **Required Element Question** Screen and select the **Save** button (alt+shift+s) to add a new Required Element Question to the list of questions on the **Manage Required Element Questions Screen**

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➔ **Edit:**

Select the checkbox next to an existing Required Element Question in the list and select the **Edit** button (alt+shift+m)

Update the fields on **Required Element Question** Screen and select the **Save** button (alt+shift+s) to edit a Required Element Question

- Select the **Back** button to return to the **Manage Required Element Questions Screen** or

- Select the **Add Another Required Element** button to add a new Required Element Question to the list
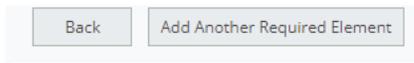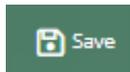
➔ **Delete:**

Select one or more of the Required Element Questions in the list and select the **Delete** button (alt+shift+x) to delete a Required Element Question from the list

The following Delete Confirmation Message will be provided:

"Delete Confirmation

You are about to delete the following records:

- {Title}
- {Title}

This action cannot be undone, continue?

- **Cancel** – Select Cancel to return to to the Manage Reuired Element Question Screen with no changes

- **Delete** – Select Delete to Delete the Required Element Question from the list

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