

Agency Request Legislation – Agency Process Overview Bill Enrollment and Agency Request System (BEARS)

Agency Request Legislation – Agency Process Overview

Cabinet agencies are required to receive approval from the governor prior to submitting Agency Request Legislation to the legislature. The review and approval process starts with the development of the Agency Request Legislation package to be submitted to OFM for further analysis and review.

- ✓ The BEARS application allows users to create, prepare, edit, review, withdraw, and/or delete an Agency Request based on roles and permissions assigned
- ✓ The workflow for creating an Agency Request in BEARS is based on the current workflow and expectations
- ✓ The following processes are covered in this job aid:
 - Creation of a draft Agency Request by the Agency Administrator
 - Providing the relevant information and completing the Agency Request by an Agency Analyst or the Agency Administrator
 - Submitting an Agency Request to OFM by the Agency Administrator

To create a user account for BEARS, complete the [BEARS Security Request form](#) 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 training members of your agency on BEARS, please visit the [BEARS training environment](#).
- ✓ For more information about BEARS and training materials, please visit the [BEARS web page](#).
- ✓ For additional information about BEARS, contact the OFM Help Desk.



HereToHelp@ofm.wa.gov 360.407.9100

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Create a Draft Agency Request – Agency Administrator

- ✓ An Agency Administrator can create, complete, edit, and submit, delete or withdraw an Agency Request to OFM for analysis.
- ✓ Once logged in as an Agency Administrator the Landing Page provides the following information:

The screenshot shows the BEARS Agency Request System interface. Red callout boxes point to various parts of the page:

- Toolbar - located near the top of all pages:** Includes Agency, Session, Help and Logout.
- Page Header:** Session, Agency Request ID - Agency Request Title (Request Status).
- Withdraw, New, View/Edit and Delete:** The buttons located in the header for Withdraw, New, Edit and Delete are available based on the status of the request and visible based on roles and permissions. As an admin all are visible.
- Dates of Interest, Documents and Links:**
 - Dates of Interest
 - Documents – Documents relating to Agency Requests or Legislation
 - Links
- Agency Requests:** A table listing all Agency Requests for the user's agency in the current session. The table has columns for Agency Request ID, Department Request #, Title, Program, Status, and Status Change Date.
- Sidebars or Left Nav:** Populates with workflow components for the Agency Request selected. Note: for smaller screen sizes the sidebar can collapse and show only icons for each.
- All Agency Requests:** Agency Request ID, Department Request #, Title, Program Status, Status Change Date for each Agency Request.

- **Toolbar** – The toolbar is located near the top of all pages and consists of the following:
 - Agency – Your assigned agency
 - Session – Current legislative session (In the future **Session** will be a drop down. Agency Requests created in a past session will be read only)
 - Help – Help provides the phone number and an email link to contact the OFM Helpdesk
- **Sidebar or Left Navigation** – provides navigational links to the workflow components to complete an Agency Request
- **Page Header** – contains information about the current legislative session until an Agency Request is created. After an Agency Request is created, the Page Header will contain the following: Session, Agency Request ID, the Agency Request Title, and (Request Status)
- **Agency Requests** – list of all Agency Requests for the user's agency in the current session with the following sortable/filterable columns: Agency Request ID, Department Request number, Title, Program Status, and Status Change Date
- **Withdraw, New, Edit and Delete buttons** – Withdraw, create new, edit, and delete an Agency Request are enabled based on role assignment and the status of the Agency Request. This job aid focuses on creating and completing a new Agency Request.
- **Dates of Interest, Documents and Links** – Important dates to remember, documents such as job aids and access forms, and links to notable legislative sites

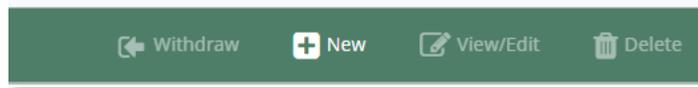
Important: If the Agency Request is being completed by an Agency Analyst, the Agency Administrator is responsible for creating the initial draft of the Agency Request. **manually assigning** the work to an Agency Analyst, reviewing the completed work, and submitting the Agency Request to OFM for Review.



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1. Select:

→ When logging into BEARS as an Agency Administrator Select the **New** button (Shortcut key: alt+shift+n)



2. Input:

→ On the **General Information** screen enter any information that applies. The following fields are required:

- Title:** enter a title for the Agency Request
- Related Agency Request:** select a radio button that applies to the Agency Request being created

Note: The Final Z-Draft Number is required prior to submittal, but not to save the form.

Note: Title and Related Agency Requests are required to save, all other fields are optional for saving a New Agency Request. The Final Z-draft number will be required prior to submittal.



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3. Save (Successful):

➔ If the save is successful, the following message is presented above the **General Information** page header:

“Agency Request successfully saved.”

Which can be dismissed or will retire on its own in several seconds.

➔ Navigate away without saving changes and the following warning message is provided with these options:

“You have unsaved changes.”

- Discard Changes - navigate away without saving
- Continue Editing, return to the **General Information** screen

Agency Request successfully saved. x

You have unsaved changes.

You can continue editing and save changes, or discard changes and navigate away.

Discard Changes
Continue Editing

4. Save (Unsuccessful):

➔ If the save is unsuccessful the following red banner appears at the top of the screen under the **General Information** header:

“The follow fields have missing/invalid entries:

- Title is required.
- Related Agency Request is required.”

➔The requirements are noted in the alerts and outlined in red.

Note: The **Save** button (alt+shift+s) is not enabled until an entry has been made within the form. Validation will not be displayed until either the required field is skipped OR an invalid entry has been made and the form is saved.

Session: 2020 Regular Session of the 66th Legislature

General Information
Save

The following fields have missing/invalid entries:

- Title is required.
- Related Agency Request is required.

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

Title

Title is required.

Description (Respond if applicable)

Provide a label, description or question

Program (Respond if applicable)

Final Z-Draft Number (Required before submittal)

Example: Z-0001.1

Related Agency Request (For historical agency requests from BATS, please use Other option.)

This is a new agency request unrelated to any prior requests.

Previously Requested

Select an agency request

Previously Approved

Select an agency request

Other

Please explain... (Max characters is 500)

Related Agency Request is required.

Back



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5. Save (Unsuccessful):

→ A save is unsuccessful if a Related Agency Request “Other” is selected and an explanation is not entered, or

→ The save is unsuccessful if a Z-draft number isn't in a valid format.

→ The following Validation Message appears at the top of the screen under the **General Information** header:

“The follow fields have missing/invalid entries:

- The Z-Draft Number must be the correct format: Z-(0001-9999).(1-999) Example: Z-0001.1
- An explanation is required”

General Information
Save

The following fields have missing/invalid entries:

- The Z-Draft Number must be in the correct format: Z-(0001-9999).(1-999). Example: Z-0001.1
- An explanation is required.

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

Title

Description *(Respond if applicable.)*

Program *(Respond if applicable.)*

Final Z-Draft Number *(Required before submittal.)*

The Z-Draft Number must be in the correct format: Z-(0001-9999).(1-999). Example: Z-0001.1

Related Agency Request *(To provide reference to a prior agency request from BATS, please use "Other" option and enter the title and session.)*

This is a new agency request unrelated to any prior requests.

Previously Requested

Previously Approved

Other

An explanation is required.

Important: Once a Draft Agency Request is created, the Agency Administrator can assign it to an Agency Analyst via Outlook Email to complete or the Agency Administrator can complete the Agency Request without assigning it to an Analyst.



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6. Edit:

→ Once the Agency Request is saved it will show in the list of Agency Requests on the **Agency Request Home Page** with the status of “Draft” with the Status Change Date showing the date and time it was created.

→ At this point the Agency Request can be selected by double clicking on the row within the list to navigate to the **General Information** screen to edit

→ The Agency Request can also be selected by the checkbox and selecting the **View/Edit** button (alt+shift+m) to navigate to the **General Information** screen to edit.

→ The Agency Request can be deleted by checking the checkbox and selecting the **Delete** button (alt+shift+x) to delete the Agency Request if it was created in error.

→ When an Agency Administrator deletes an Agency Request, the following confirmation is presented:

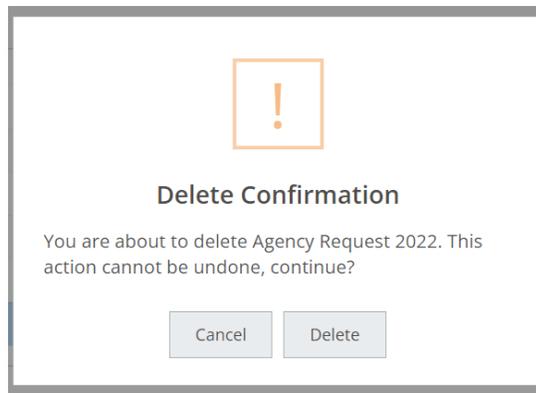
“You are about to delete {Name of File}. This action cannot be undone, continue?”

- Cancel – return back to the screen without changes
- Delete – removes the Agency Request from the system.

Session: 2020 Regular Session of the 66th Legislature

Agency Requests			
Title	Program	Status	Status Change Date
<input type="checkbox"/> a	a	OFM Review	9/2/2021, 4:01:49 PM
<input type="checkbox"/> adf	asdf	OFM Review	9/2/2021, 4:14:28 PM
<input type="checkbox"/> adsf		OFM Review	2/2/2021, 9:44:30 AM
<input checked="" type="checkbox"/> Agency Request 2022		Draft	1/24/2022, 4:22:16 PM
<input type="checkbox"/> ARL in DECISION MADE Status	The Main Program	Decision Made	9/17/2020, 12:41:34 PM
<input type="checkbox"/> ARL in DRAFT Status	The Main Program	Draft	9/17/2020, 12:41:34 PM
<input type="checkbox"/> ARL in GOV'S REVIEW Status	The Main Program	Decision Made	6/14/2021, 3:07:41 PM

Rows: 213





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Complete the Agency Request

✓ When the Agency Analyst logs into BEARS, the landing screen provides the following information:

The screenshot shows the BEARS Agency Request System interface. The main content area displays a table of Agency Requests with columns for Agency Request ID, Department Request #, Title, Program, Status, and Date. Below the table are sections for Dates of Interest, Documents, and Links. The interface is annotated with red callout boxes:

- Toolbar - located near the top of all pages**: Includes Agency, Session, Help and Logout.
- Page Header**: Session, Agency Request ID - Agency Request Title (*Request Status*).
- View/Edit**: The button located in the header for Viewing and Editing an Agency Request.
- Dates of Interest, Documents and Links**:
 - Dates of Interest
 - Documents – Documents relating to Agency Requests or Legislation
 - Links
- Sidebar or Left Nav**: Populates with workflow components for the Agency Request selected. Note: for smaller screen sizes the sidebar can collapse and show only icons for each.
- All Agency Requests**: Agency Request ID, Department Request #, Title, Program Status, Status Change Date for each Agency Request being worked by the agency.

- ❑ Toolbar - Located near the top of all pages
 - Agency – the agency assigned
 - Session – Current Session (In the future Sessions will be a drop down and the content will be read only)
 - Help – Help provides the phone number and an email link to contact the OFM Helpdesk
- ❑ Sidebar or Left Nav - provides navigational links with the workflow components to complete an Agency Request after it is created or selected for editing
- ❑ Page Header - Session, Agency Request ID - Agency Request Title (*Request Status*)
- ❑ All Agency Requests - List of all Agency Requests for your agency in the session
- ❑ View/Edit button – for viewing and/or editing of a selected agency request
- ❑ Dates of Interest, Documents and Links



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1. Select:

→ Select an Agency Request from the list with a status of **Draft**, either by double clicking on the request or by selecting the request and clicking on the **View/Edit** button (alt+shift+m)

Agency Requests View/Edit				
Title	Program	Status	Status Change Date	
<input type="checkbox"/> a	a	OFM Review	9/2/2021, 4:01:49 PM	
<input type="checkbox"/> adf	asdf	OFM Review	9/2/2021, 4:14:28 PM	
<input type="checkbox"/> adsf		OFM Review	2/2/2021, 9:44:30 AM	
<input checked="" type="checkbox"/> Agency Request 2022		Draft	1/24/2022, 4:22:16 PM	
<input type="checkbox"/> ARL in DECISION MADE Status	The Main Program	Decision Made	9/17/2020, 12:41:34 PM	
<input type="checkbox"/> ARL in DRAFT Status	The Main Program	Draft	9/17/2020, 12:41:34 PM	
<input type="checkbox"/> ARL in GOV'S REVIEW Status	The Main Program	Decision Made	6/14/2021, 3:07:41 PM	

Rows: 213

Important: As the Agency Request proceeds through the process of creation, submittal, analysis, and approval the status changes to indicate where it is in the process. This job aid covers the statuses of **Draft** and **Submitted**.

The following statuses may be visible in the list of Agency Requests accessible to the Agency Analyst and the Agency Administrator when logging into BEARS.

1. **Draft** – Initial Agency Request created by the Agency Administrator
2. **Submitted** – Submitted to OFM for analysis by the Agency Administrator
3. **OFM Review** – Assigned to an OFM Analyst and in process. The only part of an Agency Request that is editable when it is in this status are attachments. If attachments are edited, the Agency Request will need to be resubmitted by the Agency Administrator
4. **Revision Requested** – OFM can request additional information for an Agency Request after an analysis is submitted. When the additional information has been added to the Agency Request either by the Agency Analyst or the Agency Administrator, it will need to be resubmitted by the Agency Administrator
5. **Withdraw Requested** – When OFM asks an agency to withdraw an Agency Request from consideration
6. **Withdraw** – The Agency Administrator can withdraw an Agency Request when it is still in **Submitted** status or in **Withdraw Requested** status. When an Agency Request is withdrawn it becomes read-only and cannot be edited
7. **Returned** – When an Agency Request is rejected or denied it receives a status of Returned
8. **Decision Made** – Approved, the Agency Request was submitted to the governor’s office with its associated OFM Analysis and Approval. Decision Made Status is Read-Only

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General Information

2 Input:

on the **General Information** screen for the Agency Request, fill in the information as requested

➔ Title – Populated with the title provided by the Agency Administrator when the request was created

➔ Status – Status of the Agency Request in process (read only)

➔ Description – Prompts to provide a label, description or question describing the Agency Request

➔ Program – information about the program affected by the proposed legislation, if applicable

➔ Z-Draft Number – The Z-draft number assigned to the bill is required before the analysis can be submitted to OFM for review

➔ Related Agency Request – if the current Agency Request is related in any of the following ways

- Previously Requested
- Previously Approved
- Or Other (Use Other to provide information on a related Agency Request with different criteria or worked in BATS)



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3. Edit:

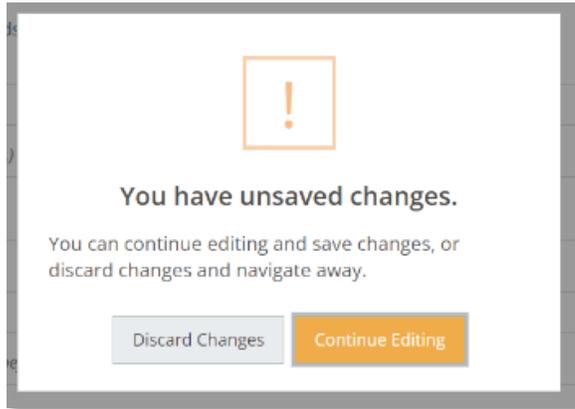
→ After the **General information** is saved, the contents can be edited at any time before it is submitted to OFM

→ Navigating away without saving changes results in the warning message with the following options:

“You have unsaved changes.”

- Discard Changes – navigate away without saving changes
- Continue editing, return to the screen and continue editing

Agency Request successfully saved. ×



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Stakeholders

1. Select:

Navigate to the **Stakeholders** screen by selecting **Continue** at the bottom of the **General Information** screen or by clicking on **Stakeholders** in the left sidebar navigation

Session: 2020 Regular Session of the 66th Legislature Agency Request: 3761 - Agency Request 2022 (Draft)

Stakeholders

All fields are required unless the stakeholder position is "Supports" or "Neutral," then the Position Explanation is optional.
 At least one stakeholder is required prior to submitting. To identify a stakeholder with missing information enter "Unknown" in the field and use "No Response" for their Position.

First Name	Last Name	Organization	Contact Information	Position	Position Explanation	
<input checked="" type="checkbox"/>	John	Smith	Dire District 12	john.smith@fd12.org	No Response	funding concern

Rows: 1

Back Continue

2. Input:

→ Selecting the **New** button (alt+shift+n) populates the row and fields for the following:

Note: enter "unknown" if any of the information is missing

- First Name
- Last Name
- Organization
- Contact Information – email, phone number
- Position drop down:
 - Supports
 - Supports with Concerns
 - Neutral
 - No Response (*Note: if any information for the stakeholder is "unknown" select "No Response"*)
 - Concerns
 - Opposes
 - Other
- Position Explanation – enter text for position explanation. This is required unless position is Supports or Neutral
- Save – Once the information has been entered select the **Save** button (alt+shift+s)

Session: 2020 Regular Session of the 66th Legislature Agency Request: 3761 - Agency Request 2022 (Draft)

Stakeholders

All fields are required unless the stakeholder position is "Supports" or "Neutral," then the Position Explanation is optional.
 At least one stakeholder is required prior to submitting. To identify a stakeholder with missing information enter "Unknown" in the field and use "No Response" for their Position.

First Name	Last Name	Organization	Contact Information	Position	Position Explanation	
<input checked="" type="checkbox"/>	John	Smith	Dire District 12	john.smith@fd12.org	No Response	funding concern

Rows: 1

Back Continue

Session: 2020 Regular Session of the 66th Legislature Agency Request: 834 - adfzf (OFM Draft)

Stakeholders

All fields are required unless the stakeholder position is Supports, then the Position Explanation is optional.
 At least one stakeholder is required prior to submitting. To identify a stakeholder with missing information enter "Unknown" in the field and use "No Response" for their Position.

First Name	Last Name	Organization	Contact Information	Position	Position Explanation
<input type="checkbox"/>	a	a	a	Other	position explanation
<input checked="" type="checkbox"/>	a	a	b	Supports	

Rows: 2

Back Continue



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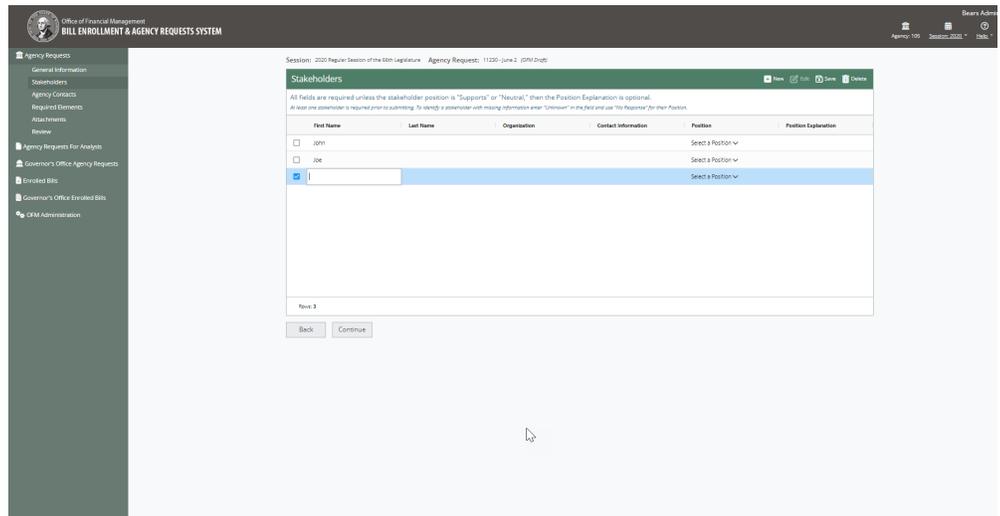
3. Multiple Stakeholders:

→ Selecting the **New** button (alt+shift+n) multiple times and each row will be populated with fields for the following:

Note: enter “unknown” if any of the information is missing

- First Name
- Last Name
- Organization
- Contact Information – email, phone number
- Position drop down:
 - Supports (*No position explanation is required*)
 - Supports with Concerns
 - Neutral (*No position explanation is required*)
 - No Response (*Note: if any information for the stakeholder is “unknown” select “No Response”*)
 - Concerns
 - Opposes
 - Other
- Position Explanation – enter text for position explanation. This is only required for the following:
 - Supports with concerns
 - No Response
 - Opposes
 - Concerns
 - Other

Save – Once the information has been entered select the **Save** button (alt+shift+s)





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4. Save (Successful):

If the stakeholder is saved successfully the user receives the following message –

“Stakeholder(s) successfully saved.”

Stakeholder(s) successfully saved.

X

5. Save (Unsuccessful):

If **Stakeholder** is saved unsuccessfully the user receives one of following in the validation summary:

“The following sections have missing/invalid entries:

1. First Name must exist and be less than 100 characters. Invalid on row(s) X.”
2. Last Name must exist and be less than 100 characters. Invalid on row(s) X.
3. Organization must exist and be less than 100 characters. Invalid on row(s) X.
4. Contact Information must exist and be less than 100 characters. Invalid on row(s) X.
5. Position must have a selection. Invalid on row(s) X.
6. IF one of the following positions: Supports with concerns, No Response, Opposes, Concerns or Other is selected and a position explanation isn't provided, then the following will display:
 - o Position Explanation must exist and be less than 200 characters if position is Supports with Concerns, No Response, Concerns, Opposes, Other. Invalid on row(s) X.

The following sections have missing/invalid entries:

- First Name must exist and be less than 100 characters. Invalid on row(s) 1, 2.
- Last Name must exist and be less than 100 characters. Invalid on row(s) 1, 2.
- Organization must exist and be less than 100 characters. Invalid on row(s) 1, 2.
- Contact Information must exist and be less than 100 characters. Invalid on row(s) 1, 2.
- Position must have a selection. Invalid on row(s) 2.
- Position Explanation must exist and be less than 200 characters if position is Supports with Concerns, No Response, Concerns, Opposes, Other. Invalid on row(s) 1.



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6. Edit:

→ After **Stakeholder** is saved, the contents can be edited at any time before it is submitted or after it has been submitted and the Agency Request status is not set to OFM Review.

Important: If the Agency Request has been submitted and changes have been made the Agency Administrator will need to **Resubmit** the Agency Request. This is covered in the Agency Administrator Job Aid.

→ Select the checkbox for the stakeholder to edit and click the **Edit** button (alt+shift+m), this allows edits to any column/field for the stakeholder

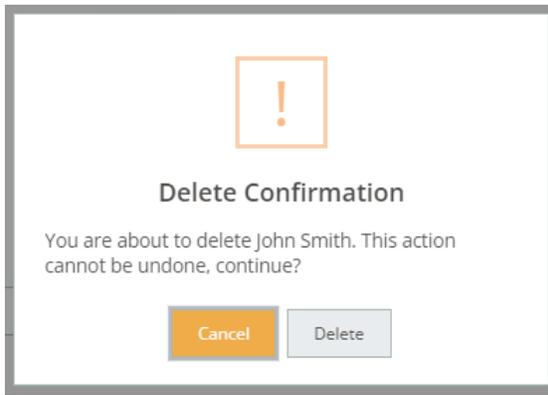
→ Select the checkbox and click on the **Delete** button (alt+shift+x) to delete a stakeholder.

→ When a Stakeholder is deleted, the following confirmation is presented:

“You are about to delete! This action cannot be undone, continue?”

- Cancel** – returns back to the screen to continue editing
- Delete** – removes the stakeholder from the list and the database

Stakeholders						
First Name	Last Name	Organization	Contact Information	Position	Position Explanation	
<input checked="" type="checkbox"/>	John	Smith	Dire District 12	john.smith@d12.org	No Response	funding concern



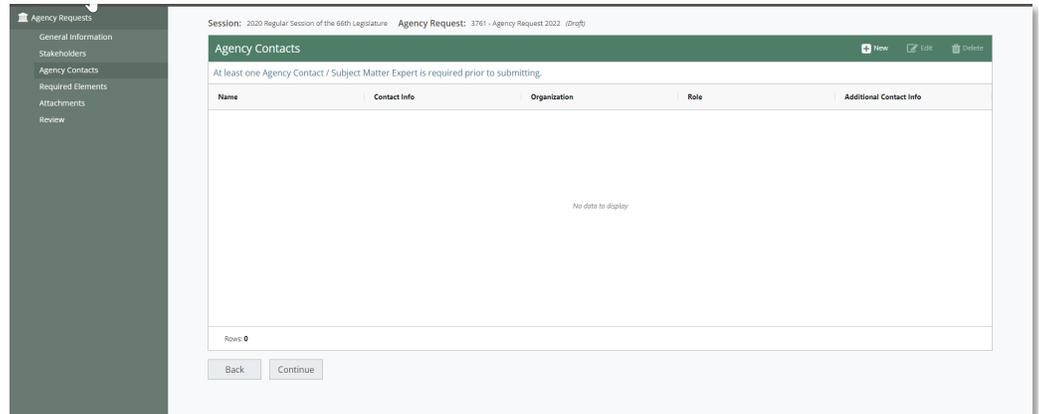


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Agency Contacts

1. Select:

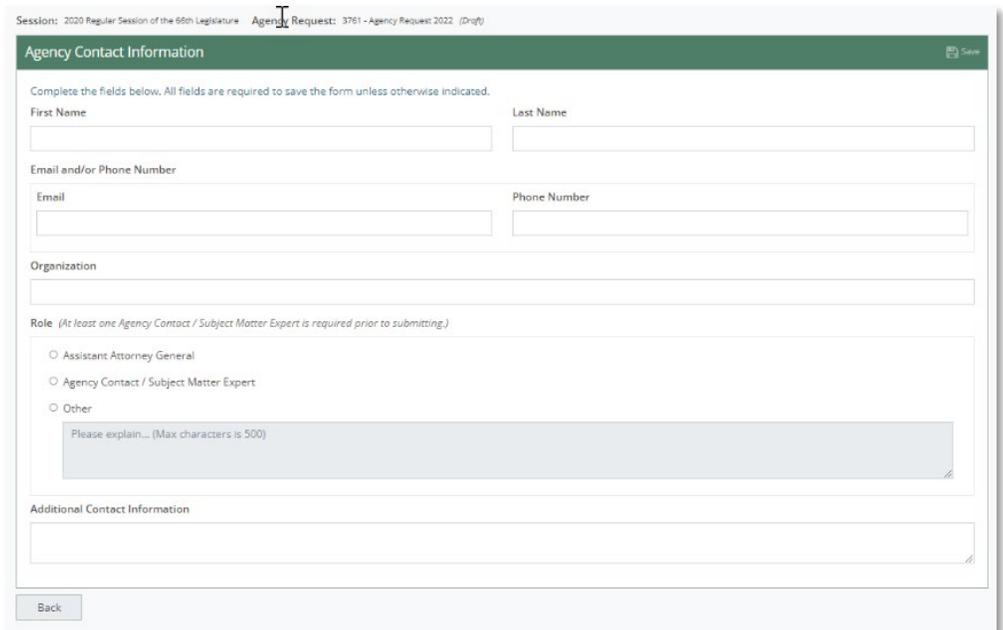
Navigate to **Agency Contacts** screen by selecting the **Continue** button at the bottom of the **Stakeholders** screen or by clicking on **Agency Contacts** in the left sidebar navigation.



2. Input:

On the **Agency Contact Information** screen, enter the following:

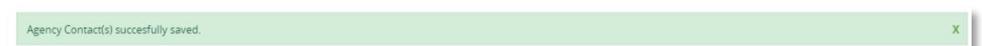
- First Name
- Last Name
- Email and/or Phone Number
- Organization
- Role (*At least one Agency Contact/Subject Matter Expert is required prior to submitting*)
 - Assistant Attorney General
 - Agency Contact/Subject Matter Expert
 - Other
- Additional Contact Information (Optional)
- Save – Once the information has been entered, select the **Save** button (alt+shift+s)



7. Save (Successful):

When the agency contact is saved successfully the following message is presented:

Agency Contact(s) successfully saved.



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8. Save (Unsuccessful):

When the Agency Contact is saved unsuccessfully the following message is presented:

“Agency Contact(s) failed to save.”

With one of the following validation summaries:

“The following sections have missing/invalid entries:

7. First Name is required.
8. Last Name is required.
9. Please provide an email and/or phone number.
10. Role is required.

→ Each Section of the form with missing or invalid information is outlined in red with a validation alert below the field stating the necessary requirements



9. Edit:

→ After an **Agency Contact** has been created the contents can be edited at any time before it is submitted or after it has been submitted and the Agency Request status is not OFM Review

Important: If the Agency Request has been submitted and changes have been made the Agency Administrator will need to **Resubmit** the Agency Request. This is covered in the Agency Administrator Job Aid.

→ Select the checkbox next to the agency contact to edit and select **Edit** (shift+alt+m), this navigates to the **Agency Contact Information** screen

→ After changes have been made, click the **Add Another Agency Contact** button at the bottom of the screen to add another agency contact, this opens a blank **Agency Contact Information** screen to complete

→ Selecting the **Back** navigates back to the **Agency Contact** screen






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Required Elements

1. Select:

→ Navigate to the **Required Elements** screen by selecting **Required Elements** from the Left Sidebar Navigation or click **Continue** from the **Agency Contacts** screen

2. Input:

→ Complete the information for each question as instructed. If a question has a *(Respond if applicable)* indicator it is not required to submit the Agency Request successfully

3. Save (Successful):

→ After completing the questions click on the **Save button** (alt+shift+s)

→ If any of the questions required to save have not been provided the following message is presented:

“Warning: The following required element(s) have missing/invalid entries and will need to be updated before submitting.”

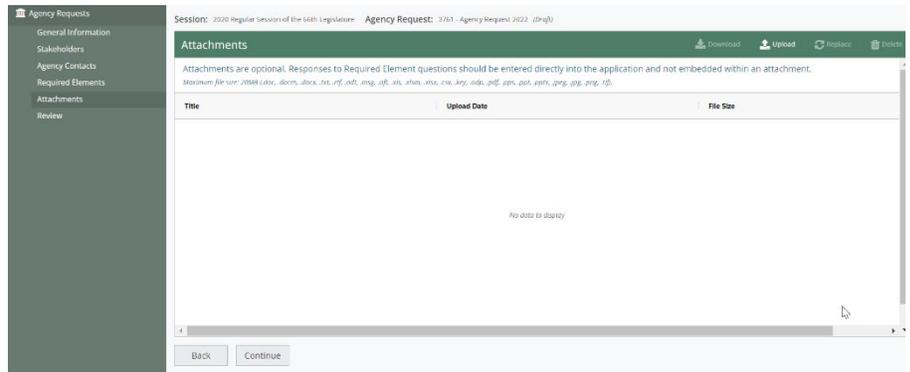
The warning lists which questions still need to be completed

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Attachments

1. Select:

→ After the required elements are saved, navigate to the **Attachments** screen by clicking **Continue** at the bottom of the **Required Elements** screen or by selecting **Attachments** in the left sidebar navigation



2. Upload:

→ Click **Upload** (alt+shift+u) to navigate to the files on your computer and select a file to upload



→ Directly below the Attachments header the following information is provided:

Attachments are optional. Responses to Required Element Questions should be entered directly into the application and not embedded within an attachment.

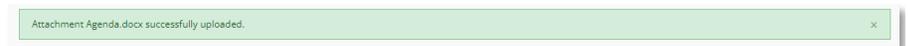
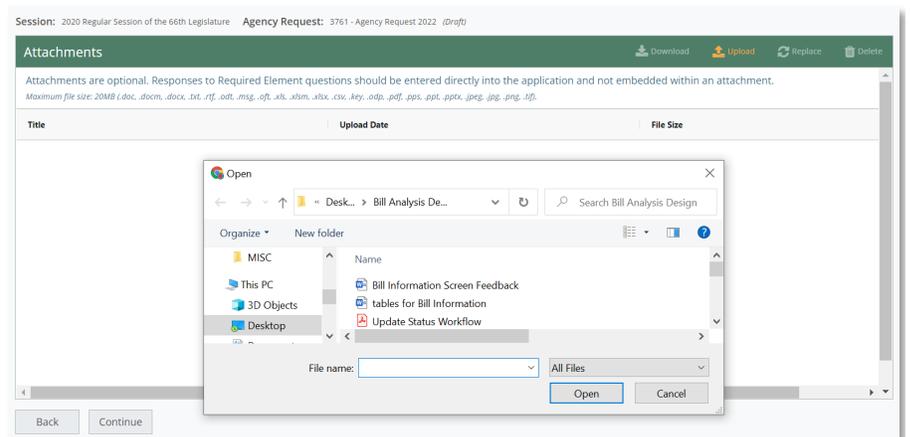
Maximum file size: 20MB (.doc, .docm, .docx, .txt, .rtf, .odt, .msg, .oft, .xls, .xlsm, .xlsx, .csv, .key, .odp, .pdf, .pps, .ppt, .pptx, .jpeg, .jpg, .png, .tif).

→ Once the file has been uploaded, a message that the file has been successfully uploaded is provided:

“Attachment {name of file} successfully uploaded.”

→ If the file is not of the appropriate format for the upload, the user will receive the following validation message:

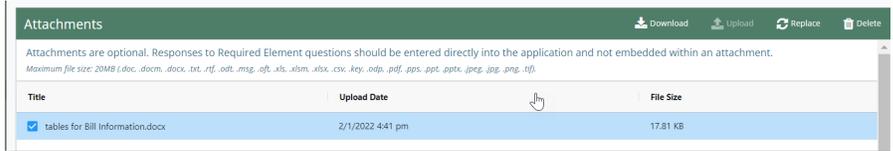
“Attachment failed to upload. Valid file types: (.doc, .docm, .docx, .txt, .rtf, .odt, .msg, .oft, .xls, .xlsm, .xlsx, .csv, .key, .odp, .pdf, .pps, .ppt, .pptx, .jpeg, .jpg, .png, .tif)”



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3. Download:

→ select the checkbox next to the file to download and click the **Download** (alt+shift+d) the file automatically downloads to the downloads folder on your computer, there is no validation message for a download



4. Delete:

→ Select the checkbox next to the file to delete and click the **Delete** (alt+shift+x) the following delete confirmation message is provided:

“Delete Confirmation

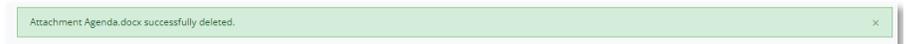
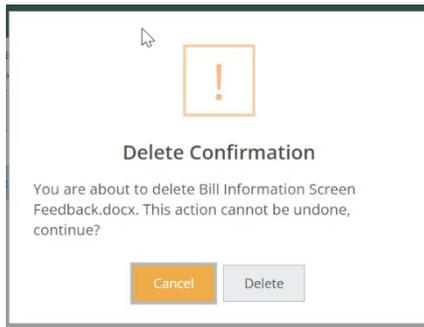
You are about to delete {Name of File.filetype} this action cannot be undone, continue?”

→ **Cancel** navigates back to the page with no changes,

→ **Delete** removes the file from the Attachments list and the following validation message is displayed:

“Attachment {name of file} successfully deleted.”

Note: Attachments can be added after submittal without having to resubmit the Agency Request





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5. Replace:

→ Select the checkbox next to the file to replace and click **Replace** (alt+shift+c) the following replace confirmation message is displayed:

“Replace Confirmation

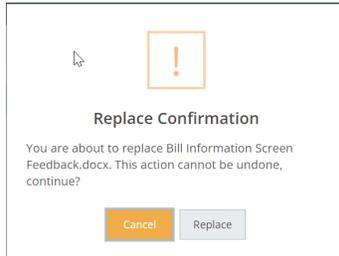
You are about to delete {Name of File.filetype} this action cannot be undone, continue?”

→ **Cancel** navigates back to the page with no changes,

→ **Replace** to browse and select a new file. Click open and the file chosen replaces the file selected in the list

The following success banner is displayed:

“Attachment {name of file} successfully replaced previous attachment (Name of File).”



Attachment BEARS Training Needs Assessment Minutes (002).docx successfully replaced previous attachment BATS Security Roles (1).docx.

Sessions: 2020 Regular Session of the 66th Legislature Agency Request: 6783 - this is a test (Draft)

Attachments
Download Upload Replace Delete

Attachments are optional. Responses to Required Element questions should be entered directly into the application and not embedded within an attachment.
 Maximum file size: 20MB (.doc, .docm, .docx, .txt, .rtf, .odt, .msg, .rtf, .xls, .xlsm, .xlsx, .csv, .xps, .ods, .pdf, .ppt, .pptx, .png, .jpeg, .zip, .zipx, .tif)

Title	Upload Date	File Size
<input type="checkbox"/> BEARS Training Needs Assessment Minutes (002).docx	3/9/2022 6:02 pm	273.82 KB

Rows: 1

Back
Continue

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Review

1. Select:

→ After any optional Attachments have been added, navigate to the **Review** screen by click on the **Continue** button at the bottom of the **Attachments** page or through the left sidebar navigation.

2. Review and Update:

→ A validation message at the top of the screen displays which section(s) need additional information added:

“The following sections have missing invalid entries:

- {Name of section and field}

→ Each section of the **Review** screen has an **Update** button

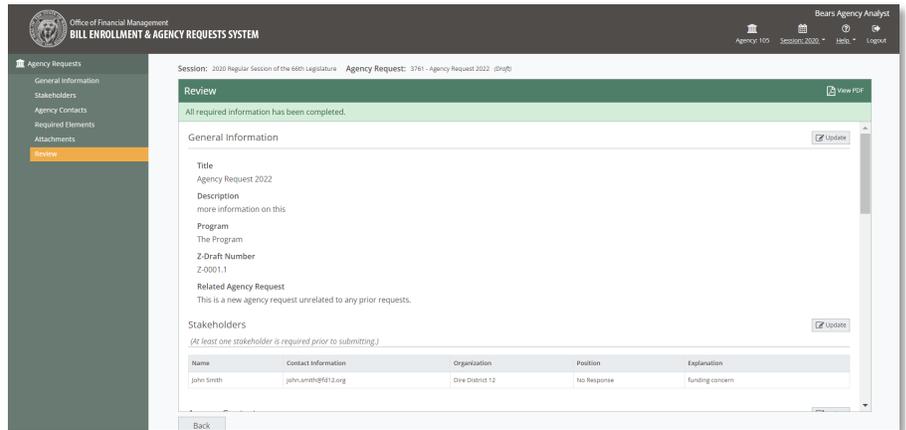
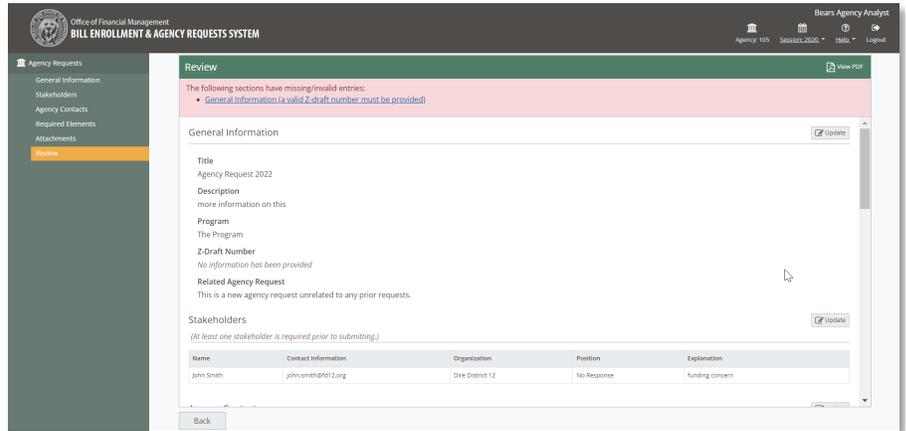
→ Click **Update** to update the corresponding page and section with any necessary information

→ When all information is complete, the following success validation message is provided:

“All required information has been completed.”

→ By clicking on the **View PDF** (alt+shift+p) a PDF is generated containing all information entered

Important: At this point the Agency Analyst needs to manually contact the Agency Administrator to submit the Agency Request.





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Submit the Agency Request – Agency Administrator

1. Select:

→ After logging in as the Agency Administrator

→ Navigate to the **Review** screen via the left sidebar navigation or via **Continue** on the **Attachments** screen

2. Review:

→ A validation message at the top of the screen displays which section(s) need additional information added:

“The following sections have missing invalid entries:

- {Name of section and field}

→ Each section of the Review screen has an **Update** button

→ Click **Update** to update the corresponding page and section with any necessary information

→ When all of the information is complete, the following success validation message is provided:

“All required information has been completed.”

→ By clicking on **View PDF** (alt+shift+p) a PDF is generated containing all information entered

The screenshot shows the 'Review' screen in the BEARS system. A red banner at the top indicates a validation error: "The following sections have missing/invalid entries: General Information (a valid Z-draft number must be provided)". Below this, a list of sections is shown: 10. test updated, 11. test, 12. asdf, 13. test, 14. rich text has an attachment, and 15. dfd. Each section has an 'Update' button. At the bottom, there is an 'Attachments' section with a file named 'tables for Bill Information.docx' and a 'View PDF' button.

The screenshot shows the 'Review' screen in the BEARS system after successful completion. A green banner at the top states: "All required information has been completed." Below this, the 'General Information' section is visible, including fields for Title (Agency Request 2022), Description (more information on this), Program (The Program), Z-Draft Number (Z 0001.1), and Related Agency Request (This is a new agency request unrelated to any prior requests.). There is also a 'Stakeholders' section with a table and an 'Update' button. At the bottom, there is a 'View PDF' button.





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3. Submit:

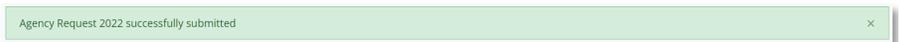
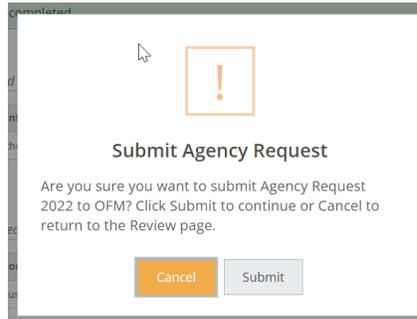
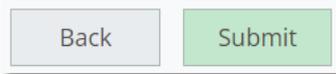
→ Click on **Submit** at the bottom of the page and the following Submit Agency Request confirmation is provided:

“Submit Agency Request

Are you sure you want to submit {Title of Agency Request} to OFM? Click Submit to continue or Cancel to return to the Review page.

→ Once the Agency Request has been submitted a validation message indicates that it was successfully submitted.

“{name of file} successfully submitted.”



Note: The Agency Analyst can make changes to the Agency Request after it is submitted until the status is OFM Review. If changes have been made, the Agency Administrator will need to **Resubmit** the Agency Request. The Resubmittal process is covered in the Agency Administrator Job Aid.