

### **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:
  - o 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
  - o Submitting an Agency Request to OFM by the Agency Administrator

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

- BEARS can be accessed using Chrome, Firefox, or Microsoft Edge. Access <u>BEARS application</u>.
- For training members of your agency on BEARS, please visit the <u>BEARS training environment</u>.
- For more information about BEARS and training materials, please visit the <u>BEARS web page</u>.
- 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:

Toolbar - located near the top of all pages	Office of Financial Mana DILL ENNIULIMENT	geneed & Auent T Requests ststem						bearsAgercyAdministrator@ofm.wa.gov ✿ ֎ ֎ C & Agency 105 Session, 2022.* Iblic.* Lawat	Page Header Session, Agency Request ID - Agency Request Title
Includes Agency, Session, Help and Logout	1	/	Agency Requests Agency Requests Agency Requests Agency Requests D D D D D D D D D D D D D D D D D D	▼   188± 0	7 Program 0	(er tet ▼   Status 0 OPM Review	ntrans 💽 Name 🔗 Visus/Laft 📄 Colores 🝸 Status Change Date 0 T Siz002.0222, 1047 Add		(Request Status)
Sidebar or Left Nav Populates with workflow components for the			772 778 777 777 747 746 776 746	l l N-167 B Assission	Propan a	Diatt Diatt Diatt Diatt Withdrawn OfficiReview Submitted	06/15/222, 1289 PM 06/15/222, 02/9 PM 06/15/202, 02/9 PM 06/25/202, 02/9 PM 06/05/202, 02/9 PM 06/05/2022, 10/4 PM		Withdraw, New, View/Edit and Delete The buttons located in the header for Withdraw, New, Edi and Delete are available based
Note: for smaller screen sizes the sidebar can collapse and show only icons for each			Dates of Interest     Castri for Agency Submission     TheOCE, NO.C., AND PEOSTMON (LUMONT APPORTMONTM)     Feed Day of Second Alenday in January)     Feach are End	September 18, 2022 November 18, 2022 January 09, 2023 June 30, 2023	Documents     StateApport     Security Acres	S Annuest Inh Ald Innuest Inh Ald Innuest Facto	Units     Excision     Exactly instance     Exactly instance     Exact System     Exac		on the status of the request and visible based on roles and permissions. As an admin all are visible.
All Agency Requests Agency Request ID, Department									Dates of Interest, Documents and Links • Dates of Interest
Request #, Title, Program Status, Status Change Date for each									<ul> <li>Documents – Documents relating to Agency Requests or Legislation</li> </ul>
Agency Request									Links

- □ 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.



# 1. Select:

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

🇲 Withdraw	🕂 New	🕜 View/Edit	前 Delete

### 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.

	Session: 2020 Regular Session of the 60th Legislature		
abon	General Information		8
	Complete the fields below. All fields are required to save the form unless otherwise indicated.		
	Title		
	Benefative Wester (7 - 16-11)	 	
	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.)		
	O This is a new agency request unrelated to any prior requests.		
	O Previously Requested		
	Select an agency request	~	

**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.

Agency Request successfully saved.

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

### 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

### 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.

!	
You have unsaved changes.	
You can continue editing and save changes, or discard changes and navigate away.	
Discard Changes Continue Editing	

Session: 2020 Regular Session of the 66th Legislature	
General Information	🖺 Save
いプ いプ 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.	
litle	
itle is required.	
Description (Respond if applicable)	
Provide a label, description or question	
	11
Program (Respond if applicable)	
Final Z-Draft Number (Required before submittoi)	
Example: 2-0001.1	
Related Agency Request (For historical ogency requests from BATS, please use Other option.)	
<ul> <li>This is a new agency request unrelated to any prior requests.</li> </ul>	
<ul> <li>Previously Requested</li> </ul>	
Select an agency request	~
O Bendensk Assessed	
Previously Approved	
Select an agency request	~
O Other	
Please explain(Max characters is 500)	
	11
Valstard Learner Danisert is ranisirad	
nalezar nga naj maganan in tagan an	
Back	

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

🖹 Save

5. Save (Unsuccessful):	
→ A save is unsuccessful if a	General Information
Related Agency Request "Other" is selected and an explanation is not entered, or	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.
➔ The save is unsuccessful if	Complete the fields below. All fields are required to save the form unless otherwise indicated. Title
a Z-draft number isn't in a valid	Agency Request 2022
format.	Description (Respond if applicable.)
	Provide a label, description or question
The following Validation	Program (Respond if applicable.)
Message appears at the top of	
the screen under the General	Final Z-Draft Number (Required before submittal.)
Information header:	2-0001.12
"The follow fields have	The 2-Draft Number must be in the correct format: 24/001-9999). [L-999]. Example: 24/001.1 Related Agency Request (To provide reference to a prior agency request from BATS, please use "Other" option and enter the title and session.)
missing/invalid entries:	<ul> <li>This is a new agency request unrelated to any prior requests.</li> </ul>
The Z-Draft Number	O Previously Requested
must be the correct	Select an agency request
format: Z-(0001-	Previously Approved
9999).(1-999)	Select an agency request
Example: Z-0001.1	Other
An explanation is	Please explain (Max characters is 500)
required"	An explanation is required.



# 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 Legis	lature								
Agency Requests							+ New	🕜 View/Edit	前 Delete
Title 0	٣	Program 0	۲	Status 🗘	۲	Status C	hange Date 🜣		٣
L 9		a		OFM Review		9/2/202	l, 4:01:49 PM		
adf		adsf		OFM Review		9/2/202	I, 4:14:28 PM		
adsf				OFM Review		2/2/202	I, 9:44:30 AM		
Agency Request 2022				Draft		1/24/202	22, 4:22:16 PM		
ARL in DECISION MADE Status		The Main Program		Decision Made		9/17/202	20, 12:41:34 PM		
ARL in DRAFT Statusi		The Main Program		Draft		9/17/202	20, 12:41:34 PM		
ARL in GOV'S REVIEW Status		The Main Program		Decision Made		6/14/202	21, 3:07:41 PM		*
4									•
Rows: 213									





# **Complete the Agency Request**

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

Toolbar - located near the top of all pages Includes Agency, Session, Help and Logout	ADDREAM CARDINA ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM CONTRACTOR ADDREAM ADDREAM CONTRACTOR ADDREAM ADDREAM ADDREAM CONTRACTOR ADDREAM ADDREA ADDREAM ADDREAM ADD	2 <b>106 1 V Fugue 1 V Max 1</b> 1 Others 2 def	Image: Control of the second	Page Header Session, Agency Request ID - Agency Request Title (Request Status)
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 Request ID, Department Request #, Title, Program Status, Status Change Date for each Agency Request being worked by the agency	<ul> <li>m</li> <li>m</li></ul>	1 I I I I I I I I I I I I I I I I I I I	SI-SUS USA SI-SUS IN SI-SUS IN IN SI-SUS INT IN SI-SUS INT IN SI-SUS INT INT INT INT INT INT INT INT INT SI-SUS INT	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

- □ 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

# 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 $\Diamond$	T	Program 🗘	T	Status 🗘	T	Status Change Date 🜣	т	
a		a		OFM Review		9/2/2021, 4:01:49 PM		•
🗋 adf		adsf		OFM Review		9/2/2021, 4:14:28 PM		
adsf				OFM Review		2/2/2021, 9:44:30 AM		
Agency Request 2022				Draft		1/24/2022, 4:22:16 PM		
ARL in DECISION MADE Status		The Main Program		Decision Made		9/17/2020, 12:41:34 PM		
ARL in DRAFT Statusi		The Main Program		Draft		9/17/2020, 12:41:34 PM		
ARL in GOV'S REVIEW Status		The Main Program		Decision Made		6/14/2021, 3:07:41 PM		-
4							•	
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

### **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)

D BILL ENROLL	MENT & AGENCY REQUESTS SYSTEM	血 曽 ⑦ Agency: 105 <u>Session: 2020</u> * <u>Helo</u> .*	Log
ency Requests	Session: 2020 Regular Session of the 68th Legislature Agency Request: 3761 - Agency Request 2022 (Drigh)		
Seneral Information Stakeholders	General Information		<b>8</b> 2
Required Elements	Complete the helds below. All helds are required to save the form unless otherwise indicated. Title Status		
Attachments Review	Agency Request 2022 Draft		
	Description (Respand If applicable.)		
	more information on this		
			1
	Program (Respond if applicable.)		
	The Program		
	Final Z-Draft Number (Required before submittal)		
	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.		
	O Previously Resourced		
	Select an agency request	v	
	annot an regerry regiment		
	Back Continue		



3. Edit: →After the General	Agency Request successfully saved.
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
"You have unsaved changes."	You can continue editing and save changes, or discard changes and navigate away.
<ul> <li>Discard Changes – navigate away without saving changes</li> </ul>	Discard Changes Continue Editing
<ul> <li>Continue editing, return to the screen and continue editing</li> </ul>	

# **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

Stakeholders	Stakeholders					🕂 New 🕜 Edit 📳 Save 🛛
Agency Contacts Required Elements	All fields are required unless At least one stakeholder is required p	the stakeholder position is "Su rior to submitting. To identify a stakehold	upports" or "Neutral," then the Pos der with missing information enter "Unknown	ition Explanation is optional. " In the field and use "No Response" for their	Pasition.	
Attachments Review	First Name	Last Name	Organization	Contact Information	Position	Position Explanation
	🔽 John	Smith	Dire District 12	john.smith@fd12.org	No Response	<ul> <li>funding concern</li> </ul>
	Rows: 1					

# 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:
  - o Supports
  - Supports with Concerns
  - Neutral
  - No Response (Note: if any information for the stakeholder is "unknown" select "No Response")
  - o Concerns
  - Opposes
  - o 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)

Agency Requests	Sessio	n: 2020 Regular Session of	the 66th Lepislature Agency Requ	est: 3761 - Agency Request 2022 (Droft				
Stakeholders	Sta	keholders					+ N	ew 🕜 Edit 🖺 Save 🎁 C
	All fie	elds are required unless	s the stakeholder position is "Su	pports" or "Neutral," then the Pos	ition Explanation is optional.			
	At leas	t one stakeholder is required p	irlar to submitting. To identify a stakehold	er with missing information enter "Unknown"	" In the field and use "No Response" for their i	Position.		
Attachments Review		First Name	Last Name	Organization	Contact Information	Position		Position Explanation
	-	John	Smith	Dire District 12	john.smith@fd12.org	No Response	~	funding concern
	Re	us 1 ack Continue						

lakenoiders					🕂 New 🧭 Edit 💾 Save 🍈 Delete
fields are required unle least one stakeholder is required	ss the stakeholder position is Su prior to submitting. To identify a stakehol	pports, then the Position Explana der with missing information enter "Unknow	ation is optional. wn" in the field and use "No Response" for their	Position.	
First Name	Last Name	Organization	Contact Information	Position	Position Explanation
a	a	a	a	Other	✓ position explanation
a	a	b	b	Supports	~
				Supports Supports with Concerns Neural No Resonae Concerns Coposes Other	
Rows: 2					

# <complex-block><complex-block><complex-block><complex-block><complex-block>

# **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")
  - o Concerns
  - o Opposes
  - $\circ$  Other
- Position Explanation enter text for position explanation. This is only required for the following:
  - Supports with concerns
  - No Response
  - Opposes
  - Concerns
  - o Other

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



4. Save (Successful): If the stakeholder is saved

successfully the user receives the following message –

"Stakeholder(s) successfully saved."

### 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:

- First Name must exist and be less than 100 characters. Invalid on row(s) X."
- 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.
- 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.
- 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:
  - 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.

Stakeholder(s) succesfully saved.

### 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.

# 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

All fiel At least	lds are required unle one stakeholder is require	ess the stakeholder position is d prior to submitting. To identify a stake	"Supports" or "Neutral," then holder with missing information enter	the Position Explanation is opti "Unknown" In the field and use "No Respo	ional. onse" for their Position.	
	First Name	Last Name	Organization	Contact Information	Position	Position Explanation
	John	Smith	Dire District 12	john.smith@fd12.org	No Response	✓ funding concern
_						
r	<b>?</b> Edit					
2						
-	Delete					
	Delete					
		_				
			•			
		Delete Co	nfirmation			
		Delete co	minination			
	You are al cannot be	oout to delete Jo undone, contin	hn Smith. This a ue?	action		
		Cancel	Delete		1	

### **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.

Challeballdere	Agency Contacts				🕂 New 🕼 Edit 🍵 Delet
	· g,				
Agency Contacts	At least one Agency Cor	itact / Subject Matter Expert is required	prior to submitting.		
Required Elements	Name	Contact Info	Organization	Role	Additional Contact Info
			No data to display		
			10 000 10 00,000		
	Rows: 0				
	Back Continu	ie -			
	- Der Contine				

# 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
  - o 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.

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

Complete the fields below. All fields are required to save the form of	unless otherwise indicated.	
First Name	Last Name	
Email and/or Phone Number		
Email	Phone Number	
Organization		
tole (At least one Agency Contact / Subject Matter Expert is required p	prior to submitting.)	
O Assistant Attorney General		
C		
O Agency Contact / Subject Matter Expert		
Agency Contact / Subject Matter Expert     Other		
Agency Contact / Subject Matter Expert     Other     Please explain (Max characters is 500)		
O Agency Contact / Subject Natter Expert O Other Please explain (Max characters is 500) Additional Contact Information		h
Agency Contact / Subject Matter Expert     Other     Please explain (Max characters is 500)  Additional Contact Information		l.
Agency Contact / Subject Matter Expert     Other     Please explain (Max characters is 500)  Additional Contact Information		k



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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

cy Contact Information		
iloving fields have missing/invalid entries: ins Name is required. As Name is required. Please provide a valid email and/or phone number. Iole is required.		
elete the fields below. All fields are required to save the form unless otherwise indicated. Name	Last Name	

Agency Contact(s) failed to save.

The

Comp First

ピ Edit

Email and/or Phone Number	
Email	Phone Number
fease provide a valid email and/or phone number. Organization	
OFM	
Role (At least one Agency Contact / Subject Matter Expert is required prior to submitting.)	
O Assistant Attorney General	
O Agency Contact / Subject Matter Expert	
O Other	
Please explain (Max characters is 500)	
	11
tale is required. Additional Contact Information	
	1
Back	

### **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

gency Contact Information		
mail and/or Phone Number		
Email	Phone Number	
WonderWoman@justiceleague.com		
Organization		
Justice League		
tole (At least one Agency Contact / Subject Matter Expert is required prior	r to submitting.)	
O Assistant Attorney General		
Agency Contact / Subject Matter Expert		
O Other		
Please explain (Max characters is 500)		
		11
Idditional Contact Information		
		le

مع Add Another Agency Contact

### **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

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### 3. Save (Successful):

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

🚼 Save

→ 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

RepulsrSession of the 64th Legislaure Agency Request: 777 -1: (Profit)	
Elements	1
e following required element(s) have missing/invalid entries and will need to be updated before submitting: Da you have any file to attach here? Tex-updated New Question	
he fields below. All fields are required to submit your agency request legislation unless otherwise indicated. It oursted with this form and do not embed within any attochment unless indicated is do so. It work? (Respond if applicable.) 50 6 No de optional attachment[s]:	
Drop new attachments here to upload or Browse Ries	
file types: doc, docm, doc, tst, rf, odt, pdf one please (Respond if applicable.) blue	
red yellow	
hint in the second seco	er you and any mit to attach nere: ser updated leve Question fields below. All fields are required to submit your agency request legislation unless otherwise indicated. a question who may do not enter within any attachment what indicated to do as. work? (Respond if applicable.) o No e optional attachment[c]: Drop new attachments here to upload or Browse Rite: le gpess: doc, docm, docs, txt, rtf, odt, pdf te plesse (Respond if applicable.) lue ed ellow



### 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

1 Agenc	y Requests	Session: 2020 Regular Session of the 66th Legi	slature Agency Request: 3761 - Agency Request 2022 (Braft)				
		Attachments		🍰 Download	🚖 Upicad		Delete
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			No alta to display				
		1				Ş	
		Back Continue					

### 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 appliaction 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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Back Continue			_	_		
Attachment Agenda.docx successfully u	ploaded.					×

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, .jpg, .pg, .pg, .tif)



### 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



		📩 Download	🛓 Upload	C Replace	前 Delete
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# 4. Delete:

→ Select the checkbox next to the file to delete and click the **Delete** (alt+shift+x) the following delete confimation 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



Attachment Agenda.docx successfully deleted

Delete Confirmation You are about to delete Bill Information Screen Geedback.docx. This action cannot be undone, continue?		!	a 
You are about to delete Bill Information Screen Geedback.docx. This action cannot be undone, continue?	Delete Co	nfirmation	
	'ou are about to delete Bil eedback.docx. This action continue?	l Information Screen cannot be undone,	
Cancel Delete	Cancel	Delete	



### 5. Replace:

→ Select the checkbox next to the file to replace and click **Replace** (alt+shift+c) the following replace confimation 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}."

Cancel Replace Replac	reen ne,		
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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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🏛 Agency Requests	Review					C View PDF
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	Name	Contact Information	Organization	Position	Faplanation	
	John Smith Back	john.smith@fd12.org	Dire District 12	No Response	funding concern	

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	John Smith	john.smith@fd12.org	Dire District 12	No Response	funding concern			
								÷
	Back						_	

# 🔀 View PDF

# 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

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	Stakeholder (At least one sto	"S akeholder is required prior to submitting.)				C Update
	Name	Contact Information	Organization	Position	Explanation	





3. Submit: → Click on Submit at the bottom of the page and the following Submit Agency Request confirmation is provided:	Back Submit
"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.	d Submit Agency Request
<ul> <li>→ Once the Agency Request has been submitted a validation message indicates that it was successfully submitted.</li> <li>"{name of file} successfully submitted."</li> </ul>	Are you sure you want to submit Agency Request 2022 to OFM? Click Submit to continue or Cancel to return to the Review page.
	Agency Request 2022 successfully submitted ×
<b>Note:</b> The Agency Analyst can make c OFM Review. If changes have been ma Request. The Resubmittal process is c	nanges to the Agency Request after it is submitted until the status is ade, the Agency Administrator will need to <b>Resubmit</b> the Agency overed in the Agency Administrator Job Aid.