

# **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 <u>BEARS Security Request form for OFM/Governor's Office</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 Guide</u>.

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

Office of Financial Managero BILL ENROLLMENT & A	GENCY REQUESTS SYSTEM			bearsExecutiveAdministrator®ofm.wa.gov
Agency Requests	Session: 2020 Regular Session of the 66th Legislature			
Agency Requests For Analysis	Dates of Interest		Documents	🖉 Links
Enrolled Bills				
CFM Administration	Cutoff for Agency Submissions	September 18, 2022		Email Message to Legislature
	Erst Day of Session /Second Monday in January	lanuary 09, 2023		Fiscal Notes
	Fiscal Year End	June 30, 2023		Agendas, Schedules, and Calendars
		,		Capitol Campus Activities & Events

- 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.

**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.



#### 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

ssion: 2020 Regular Sessio	n of the 66th Legislature								
Agency Requests F	or Analysis					Z Z-Draft	Reports	View/Edit	Delete
Department Re 🔿 🕎	Agency 0	Agency Reques 🔿 🔻	Request Status 0 🛛 🔻	Status Change 🗅 🔻	Analysis 0	T Anal	ysis Status 🔸	Governor's	>eci ○▼
0001-999	105 - Office of Financi	test	OFM Review	05/23/2022, 03:20 PM	test	Pend	ing		
1111-116	105 - Office of Financi	test	OFM Review	05/10/2022, 10:26 AM	test	In Re	view		
1111-111	105 - Office of Financi	Janice test 99699 email	Decision Made	05/05/2022, 03:36 PM	Janice test 99699 ema	i Com	piete	Approved	
	105 - Office of Financi	test	Pending	05/24/2022, 03:28 PM					
Sour 4									
Contract of									

Analysis is locked from editing: Agency request status is Withdrawn

### 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

	!
	Edit Z-Draft Confirmation
ou are al	bout to edit the Z-Draft Number to the following:
The Final Z-D our digit nu hree digit n	raft Number must be entered using Z followed by a dash, then a mber from 0001 to 9999 followed by a period followed by a one to umber from 1 to 999. Example: Z-0001.1
	Cancel Confirm

----

# Image: Confirmation 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? Image: Confirm

Z-Draft Number successfully saved.

# **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

Create Analysis

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

endbards	Session: 2023 Re	pular Section of the Ultra Legislanure	Agency Request: 10832-5	e fusig			
lequests For Analysis	Agency Rec	uest Information				Concern Analysis 22 Updates Status D View P	
lequest information	· 8- · · /						
e Agency Requests	General In	formation					
	Title						
Caroled Bits	test						
ation	Descriptio No informa	n Kon has been provided					
	Program						
	The Progra						
	2-Draft Nu 2-0001.1	mber					
	Related Agency Request						
	This is a new agency request unrelated to any prior requests.						
	Stakeholders						
	(Agencies are	required to submit of least one s	tokeholder.)				
	Name	Contact Information		Drgenizetten	Position	Explanation	
	1602 1001	ness@rest.com		OPV	\$.goots		
	Agency Co	ntacts					
	(Agencies are	required to submit of least one i	Igency Contact / Subject Met	ter Erpert.)			
	Name	Contact Information	Organization	Reis		Additional Contact information	
	twat text	tweb@tweb.com	OPM	Agency Contect / Subject Wette	er lopert		
	Required Elements						
	1. does it work?						
	Vat						
	Back						

# Session: 2020 Regular Session of the 66th Legislaure Analysis Information Complete the fields below. All fields are required to save the form unless otherwise indicated. Analysis Name Pepartment Request # 2211-105

# Lead Policy O Budget

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."

ession: 2020 Regular Session of the 66th Legislature Agency Request: 10284 - tes	t (OFM Review) Analysis: test (In Review)
Analysis Information	Save
The following fields have missing/invalid entries: • Analysis Name is required. • The Department Request Number is required.	
Complete the fields below. All fields are required to save the form unless	otherwise indicated.
Analysis Name	Department Request #
Analysis Name is required.	The Department Request Number is required.
Lead	
Policy	
O Budget	
Back Continue	6

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halysis information		
omplete the fields below. All fields are required to save the form unless otherwise	indicated.	
nalysis Name	Department Request #	
Analysis Information 1	1111-116	
ead		
Policy		
O Budget		

#### 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."

#### 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

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.	
Reports	_
!	
Run Report	
Select a report V	
Cancel Run Report	



### **Update Status**

#### 1. Update Status:

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

🔁 Update Status

→ 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

ession: 2020 Regular Session of the 66th Legislature	
Update Status	🚼 Sav
Complete the fields below. All fields are required to save the form unless otherwise indicated.	
Agency Request Title	
test	
Agency Request Status	
O Revision Requested	
O Withdrawn Requested	
O Returned	
Reason for Request	
	/
Back Continue	

Ipdate Status	🕄 s
he 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	
est	
Agency Request Status	
O Revision Requested	
O Withdrawn Requested	
8 Returned	
Reason for Request	
lason for Request is required	
Back Continue	
Back Continue	

#### 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."

Complete the fields below. All fields are required to save the form unless otherwise indicated.	
Agency Request Title	
test	
Agency Request Status	
Revision Requested	
O Withdrawn Requested	
O Returned	
Reason for Request	
This is a reason.	
Back Continue	
Update Status Confirmation	
Are you sure you want to update the status to	
With drawn Down and Collector and a second to the	
withdrawn Reduested? Click here to generate the	
email and Update Status or Cancel to return to the	
email and Update Status or Cancel to return to the page.	
email and Update Status or Cancel to return to the page.	
email and Update Status or Cancel to return to the page.	
Cancel Update	
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 <u>OFM Administration - Manage</u> <u>Assignents for more information</u>) 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.

cy Requests	Session: 2022 Regular Ses	ion of the 67th Legislature	Agency Request: 10	10 - Bears are really cool anim	uls (OFM Review) Analysis: E	lears are really cool animals this an	a (în Review)		_
y Requests For Analysis	Assignments						🚊+ Assign 🛛 🛨 New		eleco
ncy Request information	Assignee	Assignment Status	Budget/Policy	Preparer	Reviewer	Analysis Assignments	Assignee Role	Due Date	
rsis Information	Michelle Marrs	Complete	Policy Advisor	0		Analysis Details. Fiscal	Preparer	08/29/2022	
holders	Anna Lising	Assigned	Policy Advisor		3	Analysis Details	Reviewer	09/27/2022	
sis Details	Anna Minor	Assigned	Budget Analyst		1	Analysis Details	Reviewer	09/27/2022	
Impact Information	Cheri Keller	Not Assigned				Analysis Details	SBA Reviewer		
ates	Ro Marcus	Not Assigned				Analysis Details, Revie	Legal Reviewer		
sis Recommendations	Scott Merriman	Not Assigned				Review/Edit Analysis	Legislative Director Re		
ency Clause	Bears Executive R	Not Assigned				Review/Edit Analysis	Policy Director Reviewer		
w Analysis									
Administration									

# **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.



#### 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** 

← → C ① iii ga-bears.ofm.iva.gov/20/analysis/10;	84/1672/assignments							Q 22	🖄 💶 🗳 🕹 🗯 🖬 🔘 🥘 🗄
Office of Financial Managament BILL ENROLLMENT & AGENCY REQUESTS SYSTEM									Bears Administrator
置 Agency Requests	Semiter: 2020 Page/ar Same	n of the 19th Legal eture	Among Request: 102	4-test (DRCRevent Ar	where set in finited				
Agency Requests For Analysis	Contraction of the local division of the loc					Comm Frank		then Bern	
Agency Request Information	Assignments							S and S comes	
Analysis Information	Ausignee	Assignment States	Budget/Policy	Preparer	Reviewer	Analysis Assignme	Assignee Role	Due Date	
Automation	🗆 John Doe	Not Assigned	Budget Analyst			Review/Edit Analysis	Preparer/Reviewer		
Analysis Details	Isson Drown	Not Assigned	Policy Advisor			Review/Colt Analysis	Preparen/Tev/en/er		
Fiscal Impact Information	CT Keth Phillips	Assigned	Bolicy Advisor			Review Rolt Lookup	Policy Director Reviewer		
Revenue and Expenditure		Arringed	Surfreet Analysis			Review Print Analysis	Decem		
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	Back Continu	c							



ssignment		3
Complete the fields below. All fields are required to save the form unless otherwise indicated.	Assistance Bela	
Cheri Keller ·	Legal Reviewer	v
Assignment(s) (At least one assignment is required.)	C2	🗆 Select All
Analysis Details	Review/Edit Analysis	
Analysis Recommendations	Stakeholders	
Emergency Clause		
Fiscal Impact Information		
Other Impacts		
Revenue and Expenditure Estimates		
Due Date (Respond if applicable.)		
mm/dd/yyyy		
Back Add Another Assignment		



#### Session: 2020 Regular Session of the 66th Legislature Agency Request: 10284 - test (OFM Review) Analysis: Analysis Information 1 (In Review)

Assignments					🖂 Create Email 🛛 💆 Complete	🛓+ Assign 🛛 🕂 New	ピ Edit	前 Delete
Assignee	Assignment Status	Budget/Policy	Preparer	Reviewer	Analysis Assignme	Assignee Role	Due Date	
🗌 John Doe	Not Assigned	Budget Analyst			Review/Edit Analysis	Preparer/Reviewer		
Jason Brown	Not Assigned	Policy Advisor			Review/Edit Analysis	Preparer/Reviewer		
Keith Phillips	Assigned	Policy Advisor			Review/Edit Analysis	Policy Director Reviewer		
🔽 Cheri Keller	Assigned	Budget Analyst			Review/Edit Analysis	Preparer		
Unknown(bearsex	Not Assigned	Policy Advisor			Review/Edit Analysis	Preparer/Reviewer		
Testy McTester	Assigned	Budget Analyst			Review/Edit Analysis	Policy Director Reviewer		
Anna Minor	Assigned	Budget Analyst			Analysis Details, Revie	Legislative Director Re		
Bryan Way	Assigned	Budget Analyst	0		Stakeholders, Analysis	Preparer	07/29/2022	
D Shirk	Assigned	Budget Analyst	$\sim$		Review/Edit Analysis	Legal Reviewer		
Power 9								



#### 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

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			<u>Asency, 105</u> * <u>Se</u>	55001: 2020	neg -	LOKOLI
â Agency Requests	Session: 2020 Regular Session of the 66th Legislature Agency Request: 10864 - test (OFM Review)	Analysis: test (Pending)				
Agency Requests For Analysis	Assignment					Save
Agency Request Information	rasgiment					
	Complete the fields below. All fields are required to save the form unless otherwise ind	licated.				Â
Assignments	Assignee	Assignee Role				
	Iohn Doe	Select a role				~
	Januara	Assignee Role is required				_
Revenue and Expenditure Estimates	Assignment(s) (At least one assignment is required.)			Select All		
	Analysis Details	Deview/Edit Applyrig				
Other Impacts	Analysis Recommendations	Review/cuit Analysis				
	Emergency Clause	Selected Impacts				
Review Analysis	Fiscal Impact Information	Stakeholders     Talkies Painte				
🖹 Enrolled Bills	O Other Impacts	Veto Information				
o OFM Administration	Revenue and Expenditure Estimates	C veto mornadon				
	Due Date (Respond if applicable)					
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	Back Add Another Assignment					

Office of Financial Manage BILL ENROLLMENT &	ement È AGENCY REQUESTS SYSTEM		Bears Administrator
🏦 Agency Requests	Session: 2020 Regular Session of the 66th Legislature Agency Request: 108	4 - test (OFM Review) Analysis: test (Pending)	
Agency Requests For Analysis	Assignment		Save
Agency Request Information Analysis Information	Assignee	Assignee Role	· · · · · · · · · · · · · · · · · · ·
Assignments	John Doe	<ul> <li>Select a role</li> </ul>	
Stakeholders Analysis Details	Assignment(s) (At least one assignment is required.)		Select All
Fiscal Impact Information Revenue and Expenditure Estimates	Analysis Details     Analysis Recommendations	Review/Edit Analysis     Selected Impacts	
	Emergency Clause	Stakeholders	
	Fiscal Impact Information	Talking Points	
	Other Impacts	Veto Information	
	Revenue and Expenditure Estimates		
Governor's Office Agency Requests	At least one Assignment is required.		
Enrolled Bills	Due Date (Respond if applicable.)		23
Governor's Office Enrolled Bills	mm/dd/yyyy		
🎭 OFM Administration			
	Back Add Another Assignment		
Save			



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.



#### 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."



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test https://qa-b Delete	bears.of	m.wa.go	v/20/analy	sis/102	are curren 34/agency-	request-info	ormation					_

**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.

Assignee Testy McTester successfully deleted



#### **12.** Assign Button:

→ Using the the Assign button will update any assignee to an Assigned status and immediately send an assignmment 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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Agency Request Information	Assignments					Crease Scool	Ander .	g tat 🛯 tate	
Analysis Information	Ausignes	Assignment States	Budget/Policy	Preparer	Reviewer	Andysis Assignme	Autipeus Rafe	Due Date	
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ical Inpact Information	Keth Philips	Assigned	Policy Advisor			ReviewEdit Analysis	Policy Director Reviewer		
evenue and Expenditure virtuals	Cheritater	Assigned	Budget Anelyst			ReviewColt Anelysis	Preparer		
Analysis Recommendations	Uninovnitester.	Not Assigned	Pallor Advisor			Review Colt Anelios	Precare:/Reviewer		
Other Impaces									
mergency Clause		NOT VESIGNED	oudget Analyst			Revew.com Aneyos	sond mean revene.		
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verice's Office Agency Requests									
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	!	
Preparer and/or	Reviewer Not Assigned	ł
One or more of the se identified as a review selection or edit their to Assigned.	elected Assignees has not been er or a preparer. Update your role prior to setting their status	
[	Cancel	

#### **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:

"<u>Assignments</u> – Warning Not all Assignments are completed."

→ Follow the link to the Assignments Screen or select the Assignents 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

ssignments					Country Description					
					Create Email	Complete	2+ Assign	+ New	ピ Edit	Dele
ssignee	Assignment Status	Budget/Policy	Preparer	Reviewer	Analysis A	ssignme	Assignee Role		Due Date	
] John Doe	Complete	Budget Analyst			Review/Ed	it Analysis	Reviewer			
Jason Brown	Complete	Policy Advisor			Review/Ed	it Analysis	Legal Reviewer			
Keith Phillips	Complete	Policy Advisor			Analysis D	etails, Revie	Preparer			
Cheri Keller	Complete	Budget Analyst			Review/Ed	it Analysis	SBA Reviewer			
Testy McTester	Assigned	Budget Analyst			Analysis D	etails	Policy Director	Reviewer		
Rows: 5										
	a									

# **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

**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.

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

Assignments					🖂 Create Email 🛛 📩 Complete	🚊+ Assign 🛛 🕂 New	ピ Edit	🔲 Dele
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								



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

- 🖾 🎔 Ü ↑ ↓ 8 -  =			
File Message Help Q Tell me what you want to do			
Bitprom         Image: Constraint of the state of t	Construction     Construction	ranslate Zoom Language Zoom	
Agency Request Legislation Assignment for 105-OFM			
BS BEARS System <donotreply@ofm.wa.gov> To OrM mi ISD Budget Portfalls Test Cc ORM mi ISD Budget Portfalls Test</donotreply@ofm.wa.gov>		← Raphy ≪ RaphyAE → Tax	Forward •
e Reviewer assignment for the analysis of the following Agency Request has been assigned to you:			
<u>SI</u>			

# **OFM Administration**

# **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"

	Manage Assignments					A analoge
or Anni yolis	Accipture 0	Agency 0	Antipue faite :	Earlight / Policy 0	Asta Astigned 1	
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n	Deniele Duser	025-Federal Revenue for Distribution, 0.	584 Reviewer	Pellicy Advisor	ha	
erri d Elements	I John Doe	105-Office of Financial Management, D.	Preparet/Reviewer	Budget Analyst	ko	
	Anna Mittor	005-Federal Revenue for Distribution	Preceret/Reviewer	Budget Analyst	*	
	D Begins Weg	Al Aperuso	Phasener/Mercenar	Sudget Analysi	Na	
	🗇 Jawritrami	071-blate Revenue las 204-baster, 726	Prepara Menena:	Surgel Andres	No.	
	C Keen Policy	105 Office of Diseccil Memorrary	Precare (Reviewer	Reliev Advinor	No	
	Deep Deputy Review	125 Office of Dissocial Management	Preparer/Reviews*	Reliev Advisor	No	
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	D DSH4	XPA Transfers , 227-We St Orininal Justi .	Logol Reviewer	Gudget Analys:	NO	
	Cher Kaler	125-Office of Financial Management	124 Revision	Badget Analyst	**	
	Crimerripersensed menalphilit.	125-Office of Prostelial Management.	Preparar Mercenar	Hall by Advasor	-	*
	Next 25					
	Continue					

ssignment		<b>B</b> s
Complete the fields below. All fields are required to save the form unless otherwise indicated. Assignee		
Email bryan.way@ofm.test.com	Full Name   Phone Number (Managed by OFM Identity.) Bryan Way   +1-541-754-3010	
Assigned Agencies		
All Agencies		
<ul> <li>One or more agencies</li> </ul>		
Select one or more agencies		Ŷ
ussignee Role		
Preparer/Reviewer 🗸		
Budget Analyst / Policy Advisor		
<ul> <li>Budget Analyst</li> </ul>		
<ul> <li>Policy Advisor</li> </ul>		
Back Add Apother Assignment		

#### Assignee Role

🖉 Edit

Select a r	ole				
Legal Rev	iewer				
Legislativ	e Director Review	er			
Policy Dir	ector Reviewer				
Preparer	Reviewer				
SBA Revie	wer				
Back	Add Anothe	r Assignment	1		

# A Auto-Assign



# 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

	Preview
	2020 Regular Section of the 66th Legislature
	ew Required Elements
	ollowing is a read-only preview of the required Sements questions as they will display for agencies.
	does it work? (Respond if applicable.)
	hope so
	Yes No
	Include optional attachment(s):
	Drop new attackments here to upload or Immer Film
	Valid file types: doc, docn, doc, t.a, rtf, oat, pdf
	pick one please (Respond if applicable.)
	D Non
	red
	gellow
	Include optional attachment(s):
	Drop new attachments here to upload or Directo Files
	Volid file types: doc, docm, docs, tm, rtf, odt, pdf
	sdfsadfsdafsdf (Respond // applicable.)
	A
	Pick one (Respond if applicable.)
	good to pick one
	© Yes © No
	Have you entered something here yet? (Respond if applicable.)
ļ	k

#### → 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** 

lequired Element Question	د <del>(</del> ) د
Complete the fields below. All fields are required to save the form unless otherwise indicated.	
Title (A short title used to identify the question on the listing page, not displayed to agencies.)	
Agency Required (If checks), a response will be required for all agencies to submit their agency request.)	
Required Element Question Type	
O Rich Text	
O Plain Text	
○ Yes/No Radio Buttons	
O Attachment Only	
O Checkboxes	
Description (The primary label, description, or question for agencies to respond to.)	
Provide a label, description or question	
Additional Information (Optional secondary label, description, question, or supporting information to provide to agencies.)	
Provide any additional information	
Attachments (If checked, agencies can include attachment(s) in addition to their response.)	
Allow Attachments	

+ New



#### → 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

	→	<b>Delete:</b>	
--	---	----------------	--

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

C Edit
ssoon. 200 legan state ich leganus Required Element Question (0) =
Complete the Relative Art Relative are required to save the form unless otherwise indicated. Table (A short table used to identify the question on the listing page, nee displayed to agencies.)
losses Degency Required (f) checked, a reasonue will be required for all agencies as solumit their agency required.
O Boh Tex # Flaie Tex O Yeshir Maka Burane O Katadhment Ghy: O Cholsboos
Description (The primery lobel, description, or operation for significant to respond to.) softwarticidesal
Additional Momantion (Sprional zecondary label; descrytors, guestion, or supporting information to provide to agentices) Provide any additional information Astudimenta (Checked; guestica can include attachments) in addition to their response.] Dillow Astudimenta
Back Add Another Reputed Bernert
Save
Back Add Another Required Element

Г				
	$\square$			
Delete Confirmation				
You are about to delete the following records:				
<ul><li>Is the focus in the checkbox?</li><li>UI Testing Agency Request</li></ul>				
This action cannot be undone, continue?				
Cancel	Delete			