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 may be assigned to other Executive Administrators, Executive Analysts, Executive Reviewers, or Executive Coordinators for completion of designated areas or review. The OFM Executive Administrator can also conduct and complete the analysis. Once all the necessary information is added, the agency request analysis will then be submitted by the Executive Administrator to the Governor’s office for approval or if necessary, the administrators can choose to submit prior to all information being completed.

- The OFM Executive Administrators can create, delete, review, complete and submit an analysis depending on the status of the Agency Request in process, as well as manage the assignments
- Once the assignees have completed the sections of the analysis they are assigned, they can complete their assignment
- When all assignments have been completed, the system will update the Analysis Status to completed automatically
- Generally, once the analysis has gone through the final review process then one of the executive administrators will submit the agency request with analysis to the Governor’s Office
- An assignee with a Budget or Policy specialization is usually assigned as responsible for preparation of the analysis based on the content of the Agency Request, this will generally depend on whether Budget or Policy is determined as lead
- The Budget or Policy assignee counterpart of the Preparer is responsible for review of the analysis
- Legal and Legislative Affairs can also be assigned to review the Agency Request for Analysis before it is submitted to the Governor’s Office

This document covers the workflow for assignees performing analysis for a recently submitted Agency Request. Additional OFM Executive Administrator responsibilities will be covered in the OFM Executive Administrator Job Aid.

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

- Toolbar - Located near the top of all pages
  - Agency – the agency number for the primary agency associated to user’s account
  - Session – Current legislative session (In the future a drop down containing past sessions as view only for research purposes will be provided)
  - User Info – for a BEARS user to determine if they have the correct access, the following information will be provided:
    - Username: Name used to log into BEARS
    - User Access: Role based on OFM Identity
    - Agency: The primary agency assigned to the users
    - Email: The Email address of the BEARS user logged in
  - 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
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 OFM Executive Administrator will create the analysis for an Agency Request with a Request Status of OFM Review or Revision Requested and assign it to an Executive Analyst. An email notification will be sent to the Executive Analyst informing them of their assignment.
Agency Request for Analysis

1. **Navigate:**
The Executive Analyst can reach the Analysis for the Agency Request by selecting the link in the email notification for their assignment. The link navigates to the Agency Request Information Screen.

2. **View/Edit:**
To edit an analysis for an Agency Request that has not been assigned an OFM Executive Analyst can 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 In Review or Revision Requested

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

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

   ➔ The Agency Request Analysis with the following statuses are locked for editing:
     - Gov’s Review
     - Withdrawn Requested
     - Withdrawn
     - Returned
     - Decision Made

3. **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

From: BEARS System [mailto:donotreply@ofm.wa.gov]
Sent: Friday, June 12, 2020 10:12 AM
To: leroy.jetson@ofm.wa.gov
Subject: Agency Request Legislation Assignment for 477-DFW

The Preparer assignment for the analysis of the following Agency Request has been assigned to you, please complete by 1/06/2021:

[Link to report]

![Image of BEARS system screen showing agency request information and reports]

![Image of report selection dialog box]
Agency Request Information

1. View:
The Agency Request Information Screen is view only for the Agency Analyst. This screen contains all of the information from the Review screen for the Agency Request Legislation including:
   - General Information
   - Stakeholders
   - Agency Contacts
   - Required Elements
   - Attachments

2. Select:
Select the View PDF button (alt+shift+v) to access a PDF version of the Agency Request Information Screen

3. Navigate:
Navigate to the next screen by selecting the Continue button to arrive at the Assignments Screen or select the Back button to navigate back to the Agency Request for Analysis (list) Screen
**Analysis Information Screen**

1. **Analysis Information:**
   The Analysis Information Screen is a view only screen for the Executive Analyst. The following information has been entered for the Analysis by the Executive Administrator:
   - **Analysis Name** provides the name of the Agency Request selected
   - **The Department Request #** 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**

2. **Navigate:**
   Navigate to the next screen by selecting the Continue button to arrive at the Analysis Details Screen or select the Back button to navigate back to the Agency Request Information Screen
### Assignments

1. **View:**
   On the **Assignments** screen the list of assignments for the analysis can be reviewed. The information in the list is provided in the following columns:
   - Assignee
   - Assignment Status
   - Budget/Policy
   - Preparer
   - Reviewer
   - Analysis Assignment
   - Assignee Role
   - Due Date

2. **Confirm assignment information**
   Using the list any assignee can determine their assignment role (example: whether they are Preparer versus Reviewer, as well as the sections of the analysis they are assigned and their (optional) due date.

3. **Create Email**
   Once your assignment for the analysis has been completed, Select the checkbox next to another assignee from the list and select the Create Email button (alt+shift+e)
   - An Outlook Email notification addressed to the assignee is created with room in the body of the notification to add additional instructions
   - The email notification includes a link to the Agency Request Information Screen for the Analysis

4. **Navigate:**
   Navigate to the next screen by selecting the **Continue** button to arrive at the **Stakeholders** screen or select the **Back** button to navigate back to the **Analysis Information** Screen

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**Important:** Assignments are used for tracking and informational purposes; they do NOT prevent other budget analysts and/or policy advisors not assigned from editing the analysis.
Stakeholders

1. Stakeholders:
Navigate to the Stakeholders Screen by selecting Continue button at the bottom of the Assignments screen or the left side navigation and select the New button (alt+shift+n)

2. Add New Stakeholder:
→ Selecting the New button (alt+shift+n) to populate the row and provide fields for the following:
   - First Name
   - Last Name
   - Organization
   - Contact Information – email, phone number
   - Position drop down:
     - Supports (No position explanation is required)
     - Supports with Concerns
     - Neutral
     - No Response (Note: if any info for the stakeholder is “unknown” select “No Response”)
     - Concerns
     - Opposes
     - Other
   - Position Explanation – enter 200 Characters or less of text for position explanation. only required for the following:
     - Supports with concerns
     - Opposes
     - Concerns
   - Response – enter 200 Characters or less of text for response

3. 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 the Stakeholder is saved unsuccessfully the user will receive the appropriate validation summary.

6. **Edit:**
   ➔ After a Stakeholder has been saved, the contents can be edited at any time
   ➔ Select the checkbox for the stakeholder to edit and select the **Edit** button (alt+shift+m), this allows edits to any column/field for the stakeholder
   ➔ Select the checkbox and select 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** button in the popup – takes the user back to the screen to continue editing
     - **Delete** button in the popup – removes the stakeholder from the list and the database

**Note:** At least one Stakeholder is required to complete the Agency Request Analysis.

**Important:** Only enter and/or edit up to 5 new stakeholders at once and then save changes before adding additional.

All fields are required unless the Stakeholder position is "Supports" or "Neutral," then the Position Explanation with Response is optional. To identify a Stakeholder with missing information, enter "Unknown" in the field and use "No Response" for their Position.
Analysis Details

1. **Analysis Details:**
   Navigate to the **Analysis Detail** Screen either by the left side navigation or the **Continue** button on the **Stakeholders** Screen
   ➔ The **Agency Provided Description** is populated with the Description entered on the **General Information** Screen of the Agency Request
   ➔ The information in the **Agency Provided Description** text field can be copied to the **Proposed Bill** text field by selecting the **Copy to Proposed Bill** button

2. **Analysis Details:**
   Complete all of the following text fields required for Completion:
   - [ ] **Agency Provided Description**
   - [ ] **Proposed Bill** (Required before submittal.)
   - [ ] **Current law** (Required before submittal.)
   - [ ] **OFM Legal Comments** (Respond if applicable.)
   - [ ] **Additional Analysis** (Respond if applicable.)
   ➔ The unsaved changes popup will be provided after navigating away from the screen before saving

3. **Save (Unsuccessful):**
   If the **Proposed Bill** or **Current law** fields are not complete the following message is provided:
   “Analysis Details failed to save.”

4. **Save (Successful):**
   When the Analysis Details are successfully saved the following message is provided:
   “Analysis Details successfully saved.”
Fiscal Impact Information

1. Navigate:
Navigate to the Fiscal Impact Information Screen either by the left side navigation or the Continue button on the Analysis Details Screen.

2. Select:
Are there apparent fiscal impacts?
Select one of the following Radio Buttons:
- No – must select if there are none
- Yes – requires a selection of one or more Fiscal Impact(s) from the checkboxes provided

The Fiscal Impact(s) list includes the following:
- Can’t be determined
- Provision in budget bill
- Local government impact
- Governor’s proposed budget contains necessary funds
- Not provided, agency will absorb
- Not provided, agency will not absorb
- Capital Budget Impact
- Transportation Budget Impact

3. Provide a Fiscal Summary in the text box provided. The text box will expand to accommodate.

4. Select:
Select the Save button (alt+shift+s) after completing the required fields.

5. Save (Unsuccessful):
If Yes and one or more Fiscal Impact has not been selected or Fiscal Summary Text has not been entered, the validation summary will indicate information required to save:

“The following fields have missing/invalid entries:
- At least one Fiscal Impact is required.
- Fiscal Summary.”

6. Save (Successful):
Save when the Fiscal Impact(s) Information and Summary are complete and receive a “Fiscal Impact information successfully saved message.”
Revenue and Expenditure Estimates

1. Navigate:
Navigate to the Revenue and Expenditure Estimates Screen either by the left side navigation or the Continue button on the Fiscal Impact Information Screen.

2. Select:
Click into any of the fields or select the Add/Edit Amounts button (alt+shift+m).

   ➔ Enter amounts necessary and select the Save button (alt+shift+s).

3. Save (with warning message):
If an amount greater than 5 digits will result in the following large amount warning:

   “You have entered large amounts. Reminder that the dollars are in thousands, please verify the amounts entered. To adjust amounts click Continue Editing, otherwise click Save to continue.”

   □ Continue Editing – Select Continue Editing to return to the screen with no changes
   □ Save – Select Save to save the amounts entered

   Note: a dash does NOT indicate $0 or a 0 amount

5. Save (Successful):
Enter amounts necessary and select the Save button (alt+shift+s) if the save is successful the successful save message will be provided

   “Estimated Amount(s) successfully saved.”

6. Save (Unsuccessful):
Enter amounts necessary and select the Save button (alt+shift+s) if the save is unsuccessful the unsuccessful save message will be provided

   “Estimated Amount(s) failed to save.”

   ➔ The unsaved changes popup will be provided after navigating away from the screen before saving.
7. Delete:
Select an amount to delete and select the Delete button (alt+shift+x)
⇒ The Delete Confirmation Popup will be provided:

“You are about to delete all {Row} amounts. This action cannot be undone, continue?”
  □ Cancel – Select Cancel to return to the screen with no changes
  □ Delete – Select Delete to delete the information indicated

8. Delete (Successful):
If the delete is successful the successful save message will be provided
“Estimated Amount(s) successfully deleted.”

9. Delete (Unsuccessful):
If the save is unsuccessful the unsuccessful save message will be provided
“Estimated Amount(s) failed to delete.”

Note: Deleting an amount from a cell in the table will not provide the delete confirmation popup
Analysis Recommendations

1. Navigate:
   ➔ Navigate to the Analysis Recommendations Screen either by the left side navigation or the Continue button on the Revenue and Expenditures Estimates Screen

   ➔ Select one of the following for the Budget Recommendation:
      - Approve - Comments Optional
      - Deny - Please explain
      - Conditional Hold - Please Explain

   ➔ Select one of the following for the Policy Recommendation:
      - Approve - Comments Optional
      - Deny - Please explain
      - Conditional Hold - Please Explain

2. Save (Unsuccessful):
   Select the Save button (alt+shift+s), When the Explanation for the Deny or Conditional Hold fields are not complete the following message is provided:
   “An explanation is required.”

3. Save (Successful):
   Select the Save button (alt+shift+s), When the Analysis Recommendations are successfully saved the following message is provided:
   “Recommendations successfully saved.”

4. Unsaved Changes Popup:
   “You have unsaved changes
   You can continue editing and save changes, or discard changes and navigate away.”

   ➔ Select the Discard Changes button or Continue Editing button
Other Impacts

Navigate to the Other Impacts Screen either by the left side navigation or the Continue button on the Analysis Recommendations Screen.

1. Select one of the following for Other Impacts:
   - Are there any other impacts?
     - No
     - Yes

   ➔ If Yes, a selection of one or more of the following Other Impacts is required:
     - Contains null and void clause
     - Necessary to implement the budget (NTIB)
     - New account proposed
     - New or increased taxes
     - New or increased fees

   ➔ For the Other Impact Selected, a text box to provide additional information will be provided.

2. Unsaved Changes Popup:
   Navigate away without selecting Save to receive the following:
   “You have unsaved changes
   You can continue editing and save changes, or discard changes and navigate away.”
   - Discard Changes  to discard changes and navigate away
   - Continue Editing  – Allows the user to continue editing and save changes
3. **Save (Unsuccessful):**
Select the **Save** button (alt+shift+s), if **Yes** is selected and an **Other Impact** is not selected or **Yes** is selected with no impact selection, the following validation summary is provided:

“At least one Other Impact is required.”

4. **Save (Successful):**
Select the **Save** button (alt+shift+s) the following successful save message will be provided:

“Other Impact Information sucessfully saved.”

5. **Change Response to No:**
If a response of **No** is selected after a **Yes** response has been selected and **Saved** the following popup will be provided.

“Change Response Confirmation
Are you sure you would like to change your response to No and remove any existing Impacts information?

- **Cancel** – to return to the screen with no changes
- **Change Response** – Updates to the No selection
Emergency Clause

1. Select one of the following:
   - No – defaults to selected
   - Yes

   ➔ If Yes enter the Justification for Emergency Clause in the text box provided

2. Unsaved Changes Popup:
   Navigate away without saving to receive the following:
   “You have unsaved changes.
   You can continue editing and save changes, or discard changes and navigate away.”
   - Discard Changes – to discard changes and navigate away
   - Continue Editing – Allows the user to continue editing and save changes
3. **Save (Unsuccessful):**
   Navigate away or select the **Save** button (alt+shift+s) if **Yes** is entered with no **Justification for Emergency Clause** provided in the text box provided and receive the following validation:
   
   “Justification for Emergency Clause is required.”

4. **Save (Successful):**
   Select the **Save** button (alt+shift+s) the following successful save message will be provided:
   
   “Emergency Clause Information successfully saved.”

5. **Change Response to No:**
   If a response of **No** is selected after a **Yes** response has been selected and **Saved** the following popup will be provided.
   
   “Change Response Confirmation
   Are you sure you would like to change your response to No and remove any existing Emergency Clause information?”
   
   □ **Cancel** – to return to the screen with no changes
   □ **Change Response** – Updates to the No selection
Review and Complete Analysis

1. Select:
   Navigate to the Review Screen either by the left side navigation or the Continue button on the Emergency Clause Screen.
   If you are assigned to the analysis on the Review Analysis page the following blue banner message will be provided:
   “If you are ready to complete your assignment, use the Complete button below.”

2. Review and Update:
   If there are missing fields 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 or you can follow the link in the validation summary to update the corresponding section with any missing information.

3. Complete Status for Analysis:
   When all of the screens have been completed for the Analysis the following message will be provided:
   “All required information has been completed.”

4. Preview Gov’s Summary:
   By selecting on the Preview Gov’s Executive Summary button (alt+shift+v) a PDF is generated of the Agency Request and Analysis.
Complete Assignment

1. Complete Assignment (Successful):
   ➔ Select the Complete button (alt+shift+d) to receive the Complete Assignment Confirmation popup:
   “Complete Assignment Confirmation
   You can complete your analysis for {Name of Analysis} or cancel to continue working on your assignment.
   □ Cancel – Select cancel to return to the Review Screen unchanged
   □ Complete – Select to receive the assignment successfully completed message: “Assignment successfully completed.”

2. Complete Assignment (Unsuccessful):
   If any of the screens are incomplete for the assignment the following popup will be provided when the complete button is selected:
   “Missing/Invalid field entries
   There are missing/invalid field entries, you can review the list of errors for {name of the analysis} or cancel to continue working on your assignment. The errors must be corrected before your assignment can be completed.”
   □ Cancel – Select cancel to return to the Review Screen unchanged
   □ Complete – Select to return to the Review Screen to view the Validation Summary