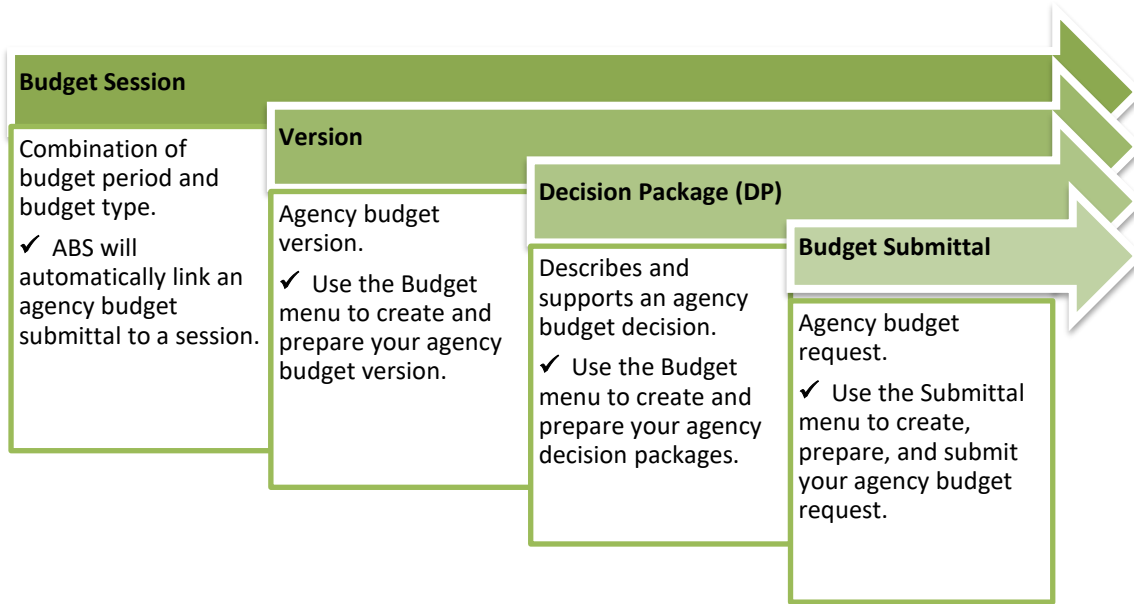




This job aid includes information for agency budget operations users and agency edit users.



Submittal Overview.....2  
 Create New Submittal .....2  
 Edit Submittal Information .....3  
 Delete Submittal.....3  
 Prepare Submittal (Overview).....4  
 Mark 'N/A' .....4  
 Submittal Notes.....5  
 Reference Information.....6  
 Attachment Tools .....6  
 Prepare Submittal (Sections).....7  
 Agency Information .....7  
 Recommendation Summary.....8  
 Decision Packages .....8  
 Agency Supporting Details .....8  
 Other Supporting Documents.....9  
 Add Attachment / Change Share Level .....9  
 Run Edit Checks.....10  
 Submit Agency Budget Request.....10  
 Recall and Re-Submit (Exception Only) .....10  
 Additional Information - Program Level and Sub-Program (Category) Level .....11



### Submittal Overview

Both agency budget operations users and agency edit users can create and prepare an agency budget request for submittal. Agency budget operations users can also submit the agency budget request.

- ✓ ABS will automatically update the status for a submittal as it moves through the budget process. For example, an agency budget request will remain in 'not submitted' status until it is submitted to OFM.

### Create New Submittal

Both agency budget operations users and agency edit users can create a new submittal.

- ✓ Create one agency budget request submittal based on OFM budget instructions for the budget session.

1. **Select:**  Submittal menu.



2. **Select:** Create New Submittal.

→ If an agency budget version is not available for the budget session, you cannot create a new submittal.

**Create New Submittal**

3. **Select:** Submittal Type.

→ ABS will provide submittal types based on the budget session.

Submittal Type\*

Agency Request ▼

4. **Input:** Submittal Title.

→ ABS will display a default title based on the budget session and submittal type. You can use the default title or input up to 50 characters to create a new title.

Submittal Title\*

YYYY-YY Sample

5. **Select:** Submittal Version.

→ ABS will provide a list of your agency budget versions for the budget session.

→ Most agencies will prepare a budget submittal with one version.

→ ABS will provide additional prompts if your agency is required to prepare a budget submittal with multiple versions. For example, DSHS (300) will select multiple versions.

Submittal Version

Select a version... ▼

→ An agency budget version will be required to prepare a submittal. If you do not select a submittal version, ABS will display a prompt to continue when you select save.

- ✓ **No** = select submittal version later.
- ✓ **Yes** = select submittal version now.

  
**Save Submittal?**

At least one version must be associated to be able to prepare your submittal, would you like to add one at this time?

No Yes

6. **Select:** Save.

→ ABS will display submittal information.

**Save**



**Manage Agency Budget Request Submittal**  
**Agency Budget System (ABS)**

→ In this example, the new submittal includes an agency budget version.

| Title          | Type           | Status        | Status Change Date | Version | Prepare | Edit | Delete | Edit Check | Release |
|----------------|----------------|---------------|--------------------|---------|---------|------|--------|------------|---------|
| YYYY-YY Sample | Agency Request | Not Submitted | Sample Date/Time   | 1ZZZZ   |         |      |        |            |         |

→ In this example, the new submittal does not include an agency budget version yet.

✓ An agency budget version is required to prepare your submittal.

| Title          | Type           | Status        | Status Change Date | Version | Prepare | Edit | Delete | Edit Check | Release |
|----------------|----------------|---------------|--------------------|---------|---------|------|--------|------------|---------|
| YYYY-YY Sample | Agency Request | Not Submitted | Sample Date/Time   |         |         |      |        |            |         |

**Edit Submittal Information**

Both agency budget operations users and agency edit users can edit information for a submittal.

✓ Submittal type cannot be edited.

1. **Select:** Edit icon.

→ You cannot select the edit icon if the agency budget request has been submitted.

| Prepare | Edit | Delete | Edit Check | Release |
|---------|------|--------|------------|---------|
|         |      |        |            |         |

2. **Edit:** Submittal Title and/or Submittal Version.

→ An agency budget version is required to prepare your submittal.

\* Indicates required fields

|                  |                  |                   |
|------------------|------------------|-------------------|
| Submittal Type*  | Submittal Title* | Submittal Version |
| Agency Request ▼ | YYYY-YY Sample   | 1ZZZ - Sample ▼   |

3. **Select:** Save.

**Save**

**Delete Submittal**

Both agency budget operations users and agency edit users can delete an agency budget submittal if the status is 'not submitted'.

1. **Select:** Delete icon.

→ You cannot select the delete icon if the agency budget request has been submitted.

2. **Select:** Yes.

| Prepare | Edit | Delete | Edit Check | Release |
|---------|------|--------|------------|---------|
|         |      |        |            |         |

**Delete Submittal**

You are about to delete Submittal (Sample).  
Continue?


**Yes** **No**

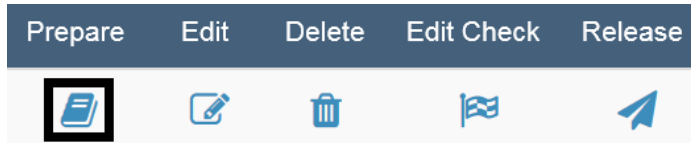


### Prepare Submittal (Overview)



Both agency budget operations users and agency edit users can prepare a submittal. An agency budget version is required to prepare a submittal.

- ✓ ABS will display submittal information based on OFM budget instructions for the budget session.
- ✓ ABS will automatically run and attach several reports when you submit your agency budget request. You can also run and review these reports as reference information.

**1. Select:**  Prepare icon.  
 → You cannot select the prepare icon if an agency budget version is not associated with the submittal.



In this example, agency organization chart is required for the submittal based on OFM budget instructions for the budget session.

| Description               | Mark | Date     | Notes | Reference Information | Attachment Tools  |
|---------------------------|------|----------|-------|-----------------------|---|
| Agency Information        |      |          |       |                       |   |
| Agency organization chart |      | Uploaded |       |                       |   |

### Mark 'N/A'



ABS will display a checkbox next to items that are optional but not required for your agency submittal.

- ✓ If an item is not required for your agency, mark it 'N/A' if it is not applicable.
- ✓ You cannot use notes and/or attachment tools for an item if it is marked 'N/A'.

**1. Select:** Checkbox for the item.  
 → ABS will provide a confirmation prompt if there are notes or an attachment for the item.

In this example, summarized revenues is  marked 'N/A' so ABS has removed the ability to use notes and attachment tools.

- ✓ Proposed fee changes is  not marked 'N/A' so ABS includes the ability to use notes and attachment tools for that item.

| Description          | Mark                                | Date     | Notes | Reference Information   | Attachment Tools  |
|----------------------|-------------------------------------|----------|-------|---|---|
| Summarized revenues  | <input checked="" type="checkbox"/> | Uploaded |       |   |   |
| Proposed fee changes | <input type="checkbox"/>            |          |       |  |  |

→ In this example, ABS will provide a prompt if the checkbox for proposed fee changes is selected because the item includes notes.



#### Submittal Component

Changing this component to 'Not Applicable' will delete all notes and the associated attachment. Continue?



**Submittal Notes**

These notes are for internal agency use. ABS does not include the notes in the information submitted to OFM.

✓ The notes option is not available for items that are marked 'N/A'.

**1. Select:** Edit icon for the item.  
→ ABS will display the notes option.

| Description               | Mark | Date     | Notes |
|---------------------------|------|----------|-------|
| Agency organization chart | N/A  | Uploaded |       |

**2. Input:** Notes.

Agency organization chart

No comments for this component have been added.

**3. Select:** Save.  
→ ABS will save the note for the item.  
→ ABS will automatically include the name of the person who created the note and a date/time stamp to indicate when the note was created.

**Save**

In this example, the agency organization chart has one note.

| Description               | Mark | Date     | Notes |
|---------------------------|------|----------|-------|
| Agency organization chart | N/A  | Uploaded |       |

**Agency organization chart**

Sample Name - Sample Date/Time

Sample note



### Reference Information

Reference information includes documents, templates, and/or reports based on OFM budget instructions for the budget session. For example, Microsoft excel templates include standard formats so that you can use the template to input information and then upload it using the attachment tools when you prepare your submittal.

- ✓ ABS will automatically run and attach several reports when you submit your agency budget request. You can also run and review these reports as reference information.

- Select:** Item in the reference information column.
  - ➔ ABS will display the reference information.
  - ➔ Reference information includes documents, templates, and/or reports based on OFM budget instructions for the budget session.

In this example, decision package summary is available as reference information. Attachment tools are not needed for this item because ABS will automatically attach it when the agency budget request is submitted.



| Reference Information  | Attachment Tools   |
|--|--|
| <a href="#">Enterprise Reporting</a>   | <i>This report will be automatically generated and attached on submittal to OFM</i>  |
| <div style="border: 2px solid black; padding: 2px;"><a href="#">Decision Package Summary</a></div> | <i>This summary will be automatically generated and attached on submittal to OFM</i> |

### Attachment Tools

Use the attachment tools to upload (attach), download (view), or delete files.

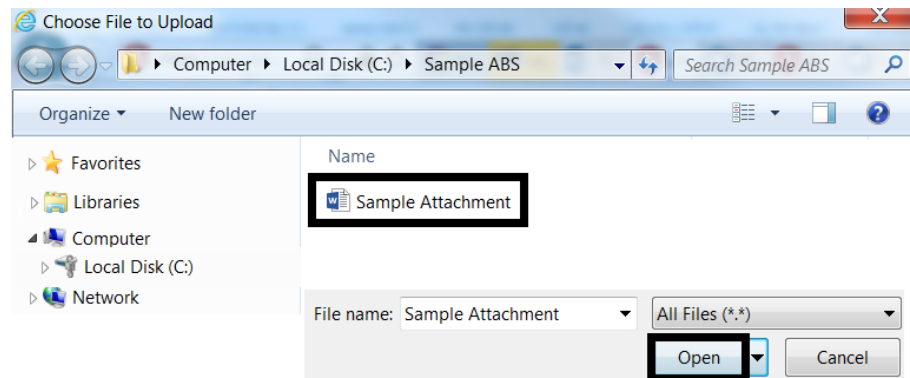
- ✓ ABS uses standard options to browse, select, and upload attachments.




- Select:**  Upload icon for the item.

| Description               | Mark | Date     | Notes | Reference Information | Attachment Tools  |
|---------------------------|------|----------|-------|-----------------------|---|
| Agency organization chart | N/A  | Uploaded |       |                       |   |




ABS uses standard options to browse, select, and upload a file.

- Select:** File. This is the attachment you want to upload.
- Select:** Open.
  - ➔ ABS will upload the file.
  - ➔ An item can only include one attachment. For example, you can only upload one file (attachment) for the agency organization chart.



| To do this         | Use this attachment tool  |
|--------------------|---|
| Replace attachment |  Upload icon   |
| View attachment    |  Download icon |
| Delete attachment  |  Delete icon   |

In this example, an attachment was uploaded for the agency organization chart.

| Description               | Mark | Date        | Notes | Reference Information | Attachment Tools  |
|---------------------------|------|-------------|-------|-----------------------|---|
| Agency organization chart | N/A  | Sample Date |       |                       |    |




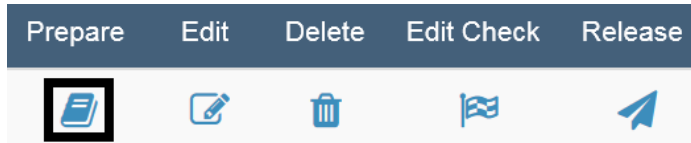
**Prepare Submittal (Sections)**

Both agency budget operations users and agency edit users can prepare a submittal. An agency budget version is required to prepare a submittal.

➔ ABS will display submittal sections and agency requirements based on OFM budget instructions for the budget session.

- ✓ Use the reference information and/or attachment tools for each item. If an item is not required for your agency, mark it 'N/A' if it is not applicable.
- ✓ ABS will automatically run and attach several reports when you submit your agency budget request. You can also run and review these reports as reference information.

**1. Select:**  Prepare icon.  
➔ ABS will display submittal sections based on OFM budget instructions for the budget session.  
➔ You cannot select the prepare icon if an agency budget version is not associated with the submittal.



➔ In this example, submittal sections are based on OFM budget instructions for the budget session.

| Description                | Mark N/A | Date Uploaded | Notes | Reference Information | Attachment Tools |
|----------------------------|----------|---------------|-------|-----------------------|------------------|
| Agency Information         |          |               |       |                       |                  |
| Recommendation Summary     |          |               |       |                       |                  |
| Decision Packages          |          |               |       |                       |                  |
| Agency Supporting Details  |          |               |       |                       |                  |
| Other Supporting Documents |          |               |       |                       |                  |

Sample submittal sections.

- ✓ ABS will display current submittal sections based on OFM budget instructions for the budget session.
- ✓ Select each section to expand the area. ABS will display information and requirements for your agency submittal.

**Agency Information**

ABS will display submittal information based on OFM budget instructions for the budget session.

- ✓ Use the reference information and/or attachment tools for each item.
- ✓ If an item is not required for your agency, mark it 'N/A' if it is not applicable.

➔ In this example, all items are required so ABS has removed the ability to mark items 'N/A'.

| Description  | Mark N/A | Date Uploaded | Notes | Reference Information                            | Attachment Tools |
|--|----------|---------------|-------|--|------------------|
| <b>Agency Information</b>                          |          |               |       |  |                  |
| Agency organization chart                          |          |               |       |  |                  |
| Agency activity inventory report                   |          |               |       |  |                  |
| Performance measure incremental estimates report   |          |               |       |  |                  |
| Indirect cost allocation to activities description |          |               |       | <a href="#">Indirect Cost Allocation Example</a> |                  |
| Agency strategic plan                              |          |               |       |  |                  |





### Recommendation Summary

ABS will display submittal information based on OFM budget instructions for the budget session.

- ✓ Use the reference information and/or attachment tools for each item.
- ✓ If an item is not required for your agency, mark it 'N/A' if it is not applicable.

➔ In this example, ABS will automatically attach the recommendation summary report to the agency budget request when it is submitted. You can also run and review the report using the link provided as reference information.

| Description                   | Mark<br>N/A | Date<br>Uploaded | Notes | Reference Information                | Attachment Tools  |
|-------------------------------|-------------|------------------|-------|--------------------------------------|---|
| <b>Recommendation Summary</b> |             |                  |       |                                      |   |
| ABS024 Recommendation Summary |             |                  |       | <a href="#">Enterprise Reporting</a> | <i>This report will be automatically generated and attached on submittal to OFM</i> |

### Decision Packages

ABS will display submittal information based on OFM budget instructions for the budget session.

- ✓ Use the reference information and/or attachment tools for each item.
- ✓ If an item is not required for your agency, mark it 'N/A' if it is not applicable.

➔ In this example, decision package summary is available as reference information. Attachment tools are not needed because ABS will automatically reference decision package information linked to the agency budget version associated with the submittal.

| Description                      | Mark<br>N/A | Date<br>Uploaded | Notes | Reference Information                    | Attachment Tools   |
|----------------------------------|-------------|------------------|-------|--|--|
| <b>Decision Packages</b>         |             |                  |       |  |  |
| <b>Budget Level: Maintenance</b> |             |                  |       |  |  |
| ML - 11 Sample                   |             |                  |       | <a href="#">Decision Package Summary</a> | <i>This summary will be automatically generated and attached on submittal to OFM</i> |
| <b>Budget Level: Policy</b>      |             |                  |       |  |  |
| PL - 12 Sample                   |             |                  |       | <a href="#">Decision Package Summary</a> | <i>This summary will be automatically generated and attached on submittal to OFM</i> |

### Agency Supporting Details

ABS will display submittal information based on OFM budget instructions for the budget session.

- ✓ Use the reference information and/or attachment tools for each item.
- ✓ If an item is not required for your agency, mark it 'N/A' if it is not applicable.

➔ In this example, templates are available as reference information. You can select a template and save it to your workstation to input your agency information then upload it using the attachment tools when you prepare the submittal.

| Description                      | Mark<br>N/A              | Date<br>Uploaded | Notes | Reference Information                         | Attachment Tools |
|----------------------------------|--------------------------|------------------|-------|---|------------------|
| <b>Agency Supporting Details</b> |                          |                  |       |   |                  |
| Summarized revenues              | <input type="checkbox"/> |                  |       | <a href="#">Fiscal Detail Template</a>        |                  |
| Proposed fee changes             | <input type="checkbox"/> |                  |       | <a href="#">Proposed Fee Changes Template</a> |                  |





### Other Supporting Documents

ABS will display submittal information based on OFM budget instructions for the budget session.

- ✓ Use the reference information and/or attachment tools for each item.
- ✓ If an item is not required for your agency, mark it 'N/A' if it is not applicable.

→ In this example, items are not required so ABS provides the ability to mark the items 'N/A'.

| Description   | Mark<br>N/A              | Date<br>Uploaded | Notes | Reference Information            | Attachment Tools |
|---|--------------------------|------------------|-------|----------------------------------|------------------|
| <b>Other Supporting Documents</b>   |                          |                  |       |                                  |                  |
| Central services fund split information   | <input type="checkbox"/> |                  |       | Central Services Fund Split Form |                  |
| Extraordinary risk management decision package and enterprise risk management updates | <input type="checkbox"/> |                  |       |                                  |                  |

### Add Attachment / Change Share Level

Use the add attachment option if you need to include additional supporting documents for your submittal.

**1. Select:** Add Attachment.

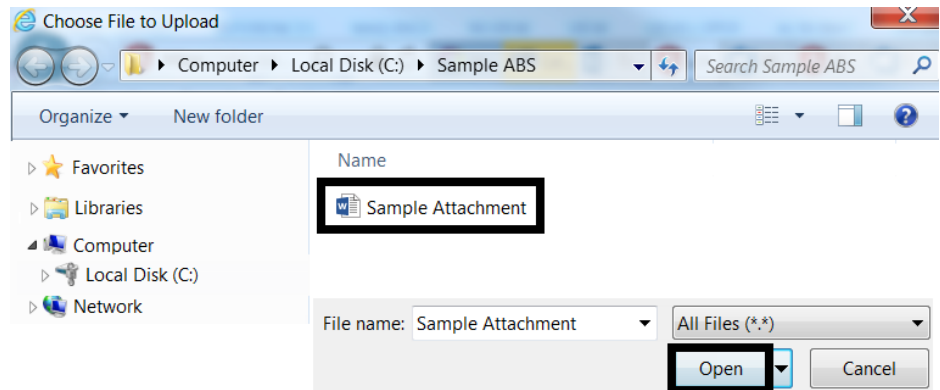
ABS uses standard options to browse, select, and upload a file.

**2. Select:** File. This is the attachment you want to upload.

**3. Select:** Open.

→ ABS will upload the file with default share level 'Public'.

→ You can add multiple attachments. The attachments are uploaded one at a time.



| To do this        | Use this      |
|-------------------|---------------|
| View attachment   | Download icon |
| Delete attachment | Delete icon   |

→ In this example, an attachment is added with a share level.

#### Other Supporting Documents

Sample Attachment.docx      **Share Level:**

Agency     OFM     Public   

→ Share level identifies who can view the attachment. To change the share level, select the checkbox next to Agency, OFM, or Public.


- ✓ **Agency** = internal agency only.
- ✓ **OFM** = internal agency and OFM.
- ✓ **Public** = Agency Budget Requests (ABR) public repository.

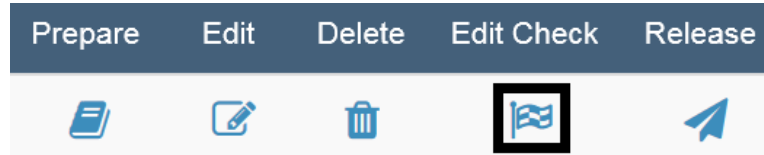


### Run Edit Checks



Both agency budget operations users and agency edit users can run edit checks.

- ✓ Use the edit checks to view a list of items that may need to be reviewed and/or corrected before submitting your agency budget request.

**1. Select:**  Edit Check icon.  
 → ABS will display results of the edit check.  
 → You cannot select the edit check icon if the agency budget request has been submitted.




→ ABS will provide information with results of the edit check.

| Severity  | Error Message                                       |
|---|---|
|  | Sample - Error Message (item needs to be corrected) |
|  | Sample - Warning Message (informational)            |

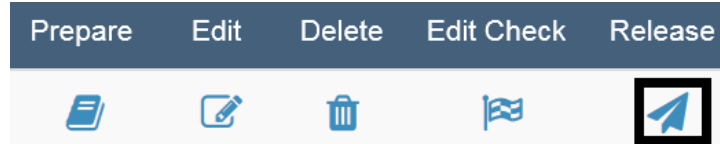
### Submit Agency Budget Request

Agency budget operations users can submit a budget request to OFM.



- ✓ ABS will provide additional information and confirmation prompts to guide you through the submittal steps.

**1. Select:**  Release icon.  
 → ABS will provide edit checks and will not proceed with the next submittal step if the edit check includes error messages that need to be resolved.  
 → ABS will provide additional information and confirmation prompts to guide you through the submittal steps.

**2. Select:** Confirmation prompt to submit the agency budget request.



→ ABS will provide information with results of the edit check before the agency budget request continues with the next step. You will receive a prompt to continue with the next step when all error messages are resolved.

| Severity  | Error Message                                       |
|---|---|
|  | Sample - Error Message (item needs to be corrected) |
|  | Sample - Warning Message (informational)            |

### Recall and Re-Submit (Exception Only)

If you accidentally submit a budget request, contact your OFM budget analyst immediately to coordinate next steps. In some cases (exception only), the OFM budget analyst may request a 'recall' for the submittal.

- ✓ If the submittal is recalled, ABS will update the status to 'recalled'.
- ✓ **Caution!** This is a rare (exception only) occurrence and includes additional steps. Your budget version will be locked and cannot be edited. You will need to associate a current budget version with your re-submittal (you may need to create a new version or copy your existing version to update the information before you can resubmit your agency budget request).



**Additional Information - Program Level and Sub-Program (Category) Level**

ABS will provide additional prompts and edit checks if your agency is required to provide information at the program and/or sub-program (category) level.

- ✓ Most agencies will prepare a submittal with one version. ABS will provide additional prompts if your agency is required to prepare a submittal with multiple versions. For example, DSHS (300) will select multiple versions when they create their submittal.

\* Indicates required fields

Submittal Type\*      Submittal Title\*

Agency Request      2019-21 Agency Request

**SAMPLE**

Submittal Version for Programs

|   |   |  |
|---|---|--|
| 010 - Children's Administration<br>Select a version... ▾          | 020 - Juvenile Rehabilitation<br>Select a version... ▾          | 030 - Mental Health<br>Select a version... ▾               |
| 050 - Long-Term Care<br>Select a version... ▾                     | 060 - Economic Services Administration<br>Select a version... ▾ | 070 - Alcohol And Substance Abuse<br>Select a version... ▾ |
| 110 - Administration/Supporting Services<br>Select a version... ▾ | 135 - Special Commitment Program<br>Select a version... ▾       | 145 - Payments to Other<br>Select a version... ▾           |
| 160 - Consolidated Field Services<br>Select a version... ▾        |   |  |