

State of New Mexico

User Training Guide

Budget Formulation and Management (BFM)



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1. What is BFM?

Budget Formulation and Management is the new software tool that will be used by the State to prepare budgets, track performance measures, and report on in-year budget-to-actuals. It includes a reporting solution that allows users access to any data that has been entered in BFM in any format.

2. BFM Terminology

Budget Form: A budget form is how users enter budget data into BFM. A budget form may display both historical and current budget data as well as require the user to enter data and text.

Form Instance: A form instance is the generic term for a particular budget form that users access to enter budget information. Each form instance has an ID, called a Form Instance ID, which is a unique numerical code that is assigned to each budget request. This ID is not generally referred to except for Decision Packages since agencies may submit multiple Decision Packages and each will have a unique Form Instance ID.

Stage: Stages are used in BFM to create workflow associated with forms. End users will enter data into a budget form at a particular stage. Some departments may have additional internal review that requires an additional stage for review and approval before it is submitted to the Budget Office.

Org/Organization: Org/Organization is a generic term referring to the organizational dimension which may consists of Agency, Budget Unit, Funds Center, or Program.

PCF: Personnel Cost Forecasting is the BFM tool that calculates the base personnel budget based on HR data and planning values loaded in the system.

Report: Reports are used to compile data in BFM in order to present budget information for decision-making and analysis or to summarize data for various uses.

3. The Budget Equation – How to Build Your Budget

BFM is designed to allow different components of the budget to be added together to create a budget request. Budget forms are used to get data into BFM; **REPORTS** are used to view the data.

3.1. Budget Forms

Following are the budget forms that will be used for budget preparation. Additional forms may be added as needed.

Form Type	Form Name
Program Narrative Form	Program Narrative (2500)
Fund Balance Form	Fund Balance Projection S-10 (2900)
Appropriation Forms	Base Budget E-4 by DeptID (3300)
	Base Budget E-4 by PCode (4300)
	Contracts E-5 (3800)
	Expansion Request (3200)

Form Type	Form Name
	Revenue R1, R3, R4, R5 (3400)
	Transfers Form R2 (2800)
	Special, Supplemental & Deficiencies (3500)
Performance Measure Forms	Performance Measures (4000)
	Performance Measures Quarterly (4100)
	Performance Measures Change Request (4400)
Position Related Forms	Employee Allocation Updates (7100)
	Vacancy Rate Form (3900)

3.2. Budget Form Stages/Workflow

Budget forms advance through the budget process using a concept called Stages. Stages are unique to each budget form and the first three characters of a stage are the form to which they are assigned.

The chart below shows an example Stage workflow for a budget form.

Stage	Description
Stage 1	Initial Entry
Stage 2	Manager Review
Stage 3	Agency Management Changes
Stage 4	Submit to DFA

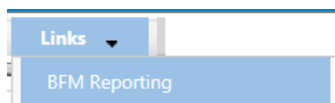
Users are assigned different roles to facilitate this workflow. For example, a “Requestor” will have EDIT access to ONLY stage 1 and can SUBMIT to stage 2, while the “Manager” will have access to EDIT stages 1 and 2 but can submit to stage 3. If security changes are required, contact the BFM Administrator.

Once you Submit your budget you will not have access any longer, but the approver has the authority to Submit the request backwards in the process, so contact the appropriate reviewer if you need to make changes post-submission (assuming the deadline has not passed).

4. How to Access BFM

BFM is accessed via internet browser. Chrome is the preferred browser and provides the best user experience. Chrome was used to create the screenshots in this user guide. Current versions of other major internet browsers are also supported.

- BFM Links:** Your BFM Link is below. Save your link as a Favorite for easy access.
<https://nm.bfm.cloud/bfmnm/default.aspx>
- Reporting:** Once you are logged into BFM, navigate to the Links dropdown menu, and click BFM Reporting, to access reports.

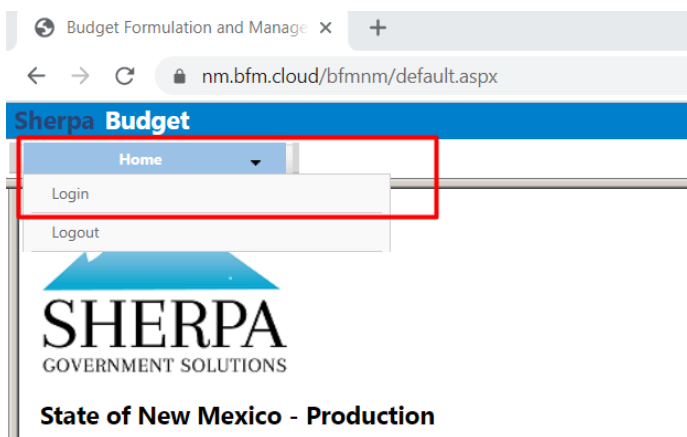


- **User Identification (ID) / Password:** Your BFM Administrator will send your User ID and Password. If you need your password reset, please contact your BFM Administrator.
- **Timeout:** Web-based applications have a built-in timeout function. A timeout function is required so users do not leave idle windows open for excessive amounts of time, impacting overall performances. The current timeout is set at **20 minutes**. Be sure to save often as you work. If you are idle for more than 20 minutes, you will have to log back in and any work you did not save will be lost.

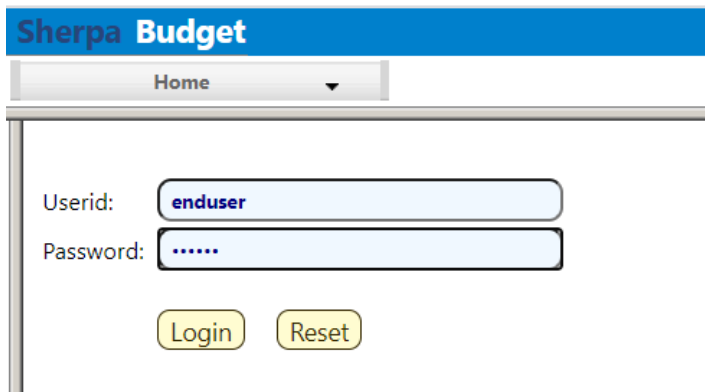
5. Logging In

5.1.1. Navigate to the BFM website.

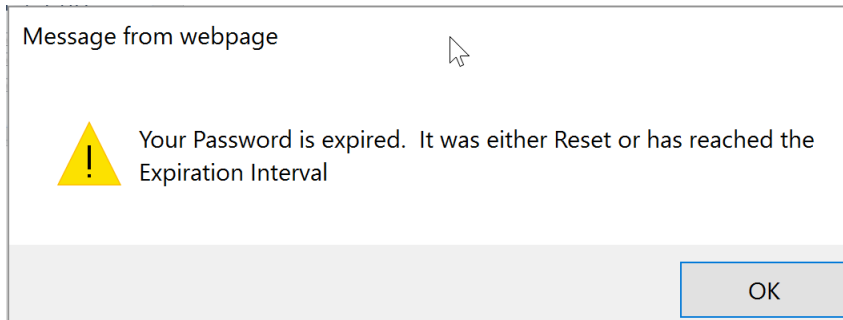
5.1.2. Expand the Home menu at the top left of the screen and click on **Login**.



5.1.3. Enter your Userid and Password, then click **Login**.



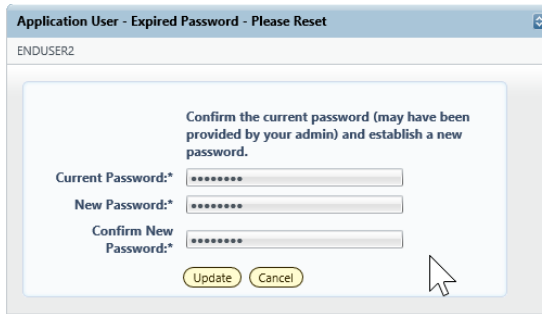
The first time you log in you may be required to change your password if you receive this dialog box:



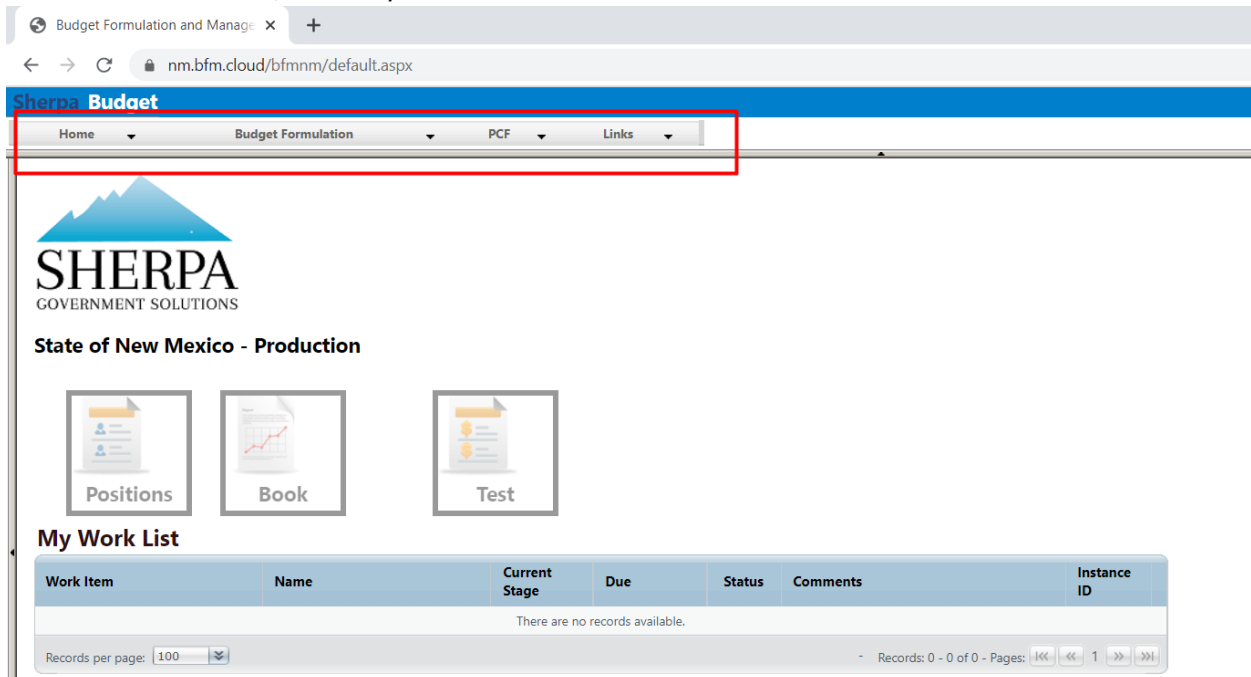
5.1.4. Click **Ok**.

5.1.5. Set your new password and click **Update**.

- Users often will set the password to match their computer login.
- Follow all State guidelines for proper password complexity.

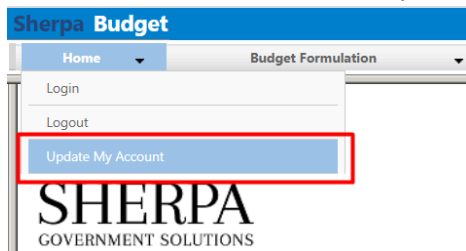


If successful, you will see the home screen and the top level menu items to which you have access. If your password needs to be reset, please contact your BFM Administrator to reset. If you believe you need additional access, contact your BFM Administrator.



5.2. Changing Password

5.2.1. A user can change their password at any time. Expand the Home menu and click Update My Account to access the Update My Password screen.



5.2.2. Enter the current password, and the desired new password into the correct fields. Follow all State guidelines for password complexity. Click Update.

Update My Password

You will remain logged into your current session. Your new password will take effect the next time you logout of BFM.

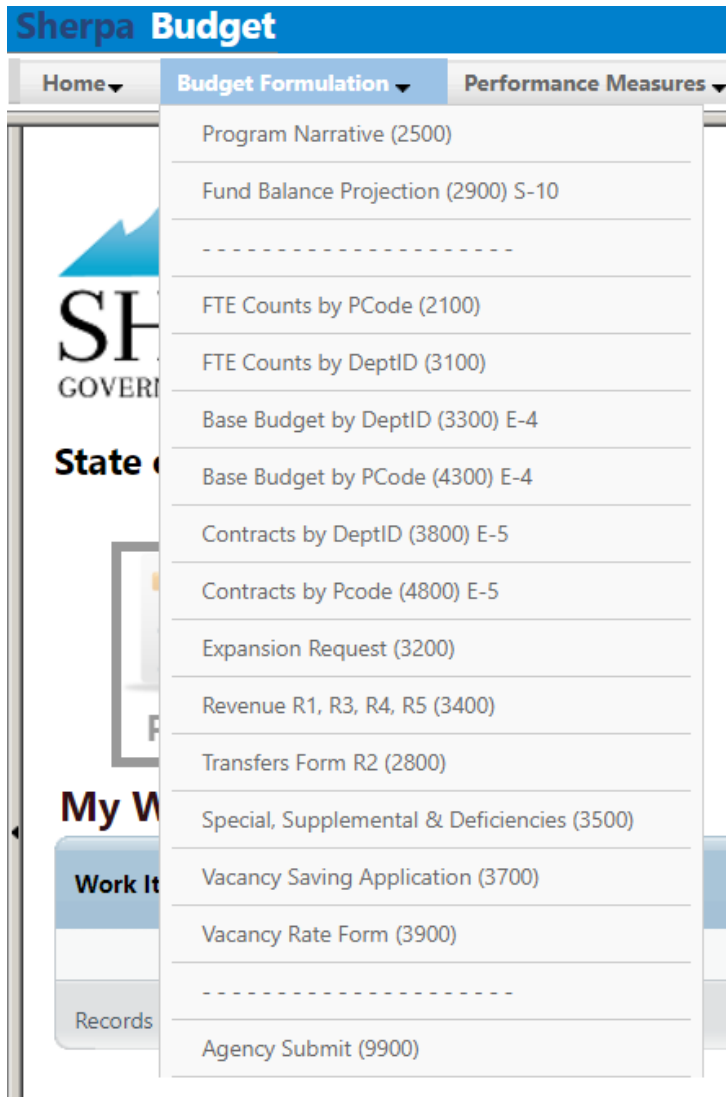
6. Basic Navigation

Each user has different Security. The level of Security controls the menu items that appear in the application.

BFM relies mostly on the mouse for navigation. Some users prefer navigation using keyboard shortcuts, tabs/enter, and other shortcuts. At this time, only a few of the typical keyboard shortcuts work. We encourage users to use mouse point-and-click for the majority of the navigation.

6.1. Menu Navigation

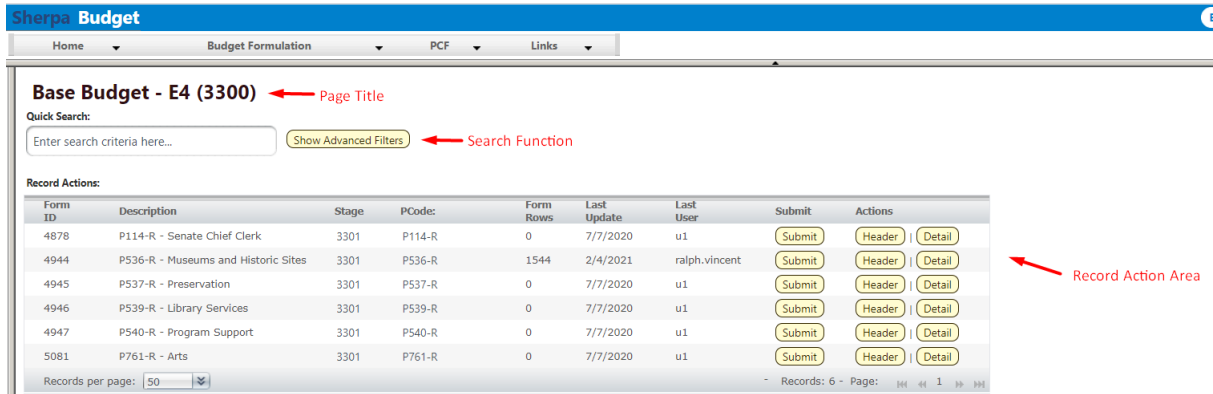
6.1.1. Hover over any top-level menu item to see the menu options. For example, the Budget Formulation menu contains the Budget Forms available to the user.



6.1.2. Click any menu item to open.

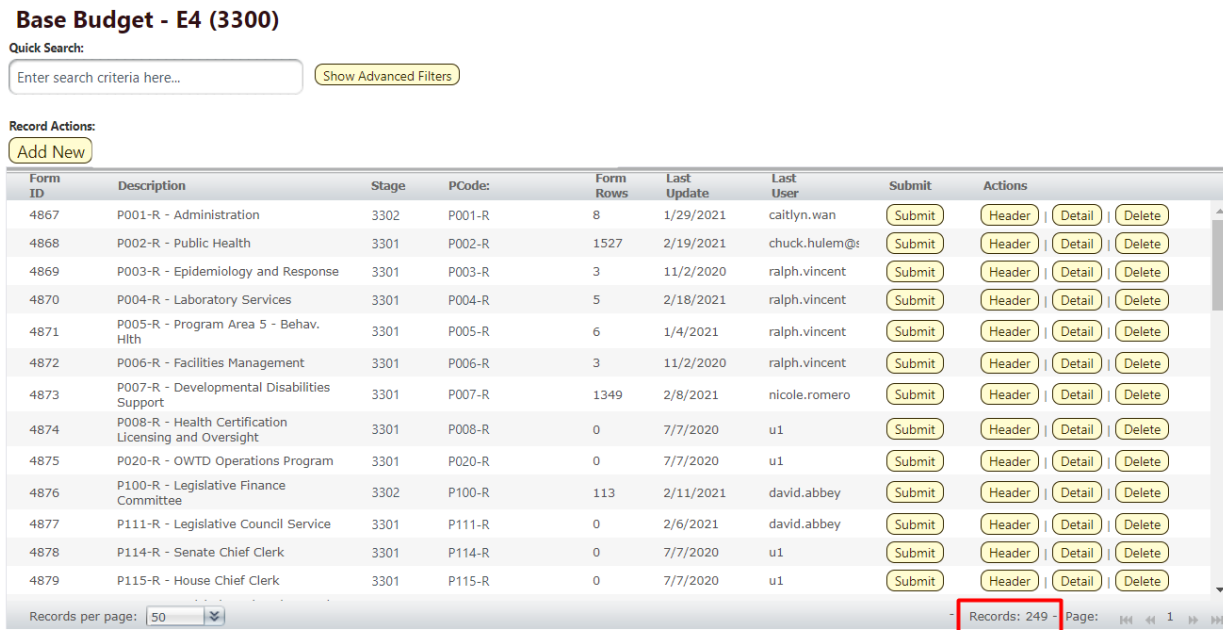
6.2. Main Screen Description

All main screens (also called a "List Page") follow a similar format. The Screen or Form Title will appear on the top of the screen, followed by a search area, and finally a list of Records, with action options, below.





Records appear in a list in the Record Action area of the screen; each row in the table is an individual record. Record is a generic term that refers to a piece of data that will vary based on the screen content. On some screens, a record may be a distinct budget form instance; on other screens, a record may be a detailed budget entry or line item. In the example below, each record shown in the list is a Base Budget E4 form prepared for a separate P-Code.

In the bottom right corner of the Record Action list, the total number of records is displayed.


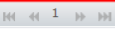


6.3. Page Through Records

6.3.1. Click on the on the double arrow  (next page) to advance to the next page of records or double arrow with an end line  (last page) to page through to the end of the available records.

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	7/7/2020	u1	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail
4946	P539-R - Library Services	3301	P539-R	0	7/7/2020	u1	Submit	Header Detail
4947	P540-R - Program Support	3301	P540-R	0	7/7/2020	u1	Submit	Header Detail
5081	P761-R - Arts	3301	P761-R	0	7/7/2020	u1	Submit	Header Detail

Records per page: 50  - Records: 6 - Page: 

6.3.2. Records per page is displayed in the lower left-hand corner of the Record Action area. The default setting is 50 records. With this setting, up to 50 records will be displayed, depending on how many records are available.

6.3.3. To change the number of records displayed, click down arrows next to the **Records per Page** number and select the number of records to display.


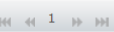
Base Budget - E4 (3300)

Quick Search:

Enter search criteria here... 

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	7/7/2020	u1	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail
4946	P539-R - Library Services	3301	P539-R	0	7/7/2020	u1	Submit	Header Detail
4947	P540-R - Program Support	3301	P540-R	0	7/7/2020	u1	Submit	Header Detail
5081	P761-R - Arts	3301	P761-R	0	7/7/2020	u1	Submit	Header Detail

Records per page: 50  - Records: 6 - Page: 

6.4. Quick Search

The Quick Search function allows users to narrow the list of records that appear in the Records Action area, instead of paging through records. Quick Search will search for text or numbers that appear in the Records Action non-data columns. For the example below, a user could search by Form ID, any text or number from the Description, Stage, or PCode. A user could even search by the last updated or last user who updated the form. Quick Search supports partial numbers or text. Quick Search does not search amount fields (dollars) or content in the record header or detail.

Base Budget - E4 (3300)

Quick Search: [Show Advanced Filters](#)

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	2/20/2021	enduser	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail
4946	P539-R - Library Services	3301	P539-R	0	7/7/2020	u1	Submit	Header Detail
4947	P540-R - Program Support	3301	P540-R	0	7/7/2020	u1	Submit	Header Detail
5081	P761-R - Arts	3301	P761-R	0	7/7/2020	u1	Submit	Header Detail

Records per page: [Show Advanced Filters](#) - Records: 6 - Page: 1

6.4.1. Type text or numbers in the **Quick Search** box. Once you stop typing for one second, you will see 'Loading...' in the table area below. The search will be applied to all non-data columns. All rows that contain the Quick Search text will be returned in the table. **Do not press Enter** or any other buttons to execute the search. Just wait.

Example 1: Search by text

Search: "Serv"

Result: All records that include the text "serv" including Preservation and Library Services.

Base Budget - E4 (3300)

Quick Search: [Show Advanced Filters](#)

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail
4946	P539-R - Library Services	3301	P539-R	0	7/7/2020	u1	Submit	Header Detail

Records per page: [Show Advanced Filters](#) - Records: 2 - Page: 1

Example 2: Search by number

Search: "536"

Result: Record that contains 536.

Base Budget - E4 (3300)

Quick Search: [Show Advanced Filters](#)

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail

Records per page: [Show Advanced Filters](#) - Records: 1 - Page: 1

6.5. Advanced Search Filters

Most BFM screens will have a **Show Advanced Filters** option. This allows searching on every column in the Records Action list, or table.

6.5.1. Click *Show Advanced Filters*.

Base Budget - E4 (3300)

Quick Search:
 Show Advanced Filters

6.5.2. A filter appears at the bottom of the table for every column.

Base Budget - E4 (3300)

Quick Search:
Show Quick Search

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	2/20/2021	enduser	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail
4946	P539-R - Library Services	3301	P539-R	0	7/7/2020	u1	Submit	Header Detail
4947	P540-R - Program Support	3301	P540-R	0	7/7/2020	u1	Submit	Header Detail
5081	P761-R - Arts	3301	P761-R	0	7/7/2020	u1	Submit	Header Detail

Records per page: Apply Filter Hide Filter - Records: 6 - Page: 1

6.5.3. When searching text fields, the following options are available:

No Filter

- » No Filter
- Contains
- Equal To
- Not Equal To
- Starts With
- Ends With

6.5.4. When searching check boxes, **equal to** is the only option. Equal to **1** means the box is checked and equal to **0** means the box is not checked.

No Filter

- » No Filter
- » Equal To

6.5.5. Click **Apply Filter** at the bottom when ready to search.

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	2/20/2021	enduser	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail
4946	P539-R - Library Services	3301	P539-R	0	7/7/2020	u1	Submit	Header Detail
4947	P540-R - Program Support	3301	P540-R	0	7/7/2020	u1	Submit	Header Detail
5081	P761-R - Arts	3301	P761-R	0	7/7/2020	u1	Submit	Header Detail

Records per page: Apply Filter Hide Filter - Records: 6 - Page: 1

6.5.6. To remove the Advanced Filter and restore the Quick Search function, click **Show Quick Search** at the top of the screen.

Form Element	Purpose	Detailed Description
Position Tab	Contains detailed position and employee data; allows system to project personnel costs; tab is only available to end users on the Expansion Request form	Section 10.3 Position Tab
Attachments Tab	Allows for files (PDF, Word, and Excel) to be uploaded as attachments on forms	Section Error! Reference source not found. Attachments Tab
Narrative Tab(s)	Contains text fields to enter detailed narrative descriptions, also called Explanation Tab	Section 10.8 Explanation Tab

8. Base Budget E-4

BFM has two options for Base Budget E-4 forms: Base Budget by DeptID form 3300 and Base Budget by PCode form 4300. Agencies will select one form, either by DeptID 3300 or by PCode 4300, for each PCode to complete and submit for appropriations request.

Base Budget E-4 by Department ID, form 3300

The Base Budget by Department ID form will display data at the Department ID level, or level 4 in the hierarchy explained below. Data from SHARE that exists below level 4 will roll up to level 4 in the form.

Level	Name	Name / Format	Description
1	All	ALL	Highest level of hierarchy, contains all Agencies
2	Agency	5 digit code (50500)	
3	Roll Up	P+3 digit code-R (P536-R)	Roll up level for all data level 4 and below
4	PCode	P+3 digit code (P536)	
	Department	10 digit Department ID + 5 digit Agency ID (3000000000-50500)	
5		10 digit Department ID + 5 digit Agency ID (3010000000-50500)	Rolls up to Department, level 4



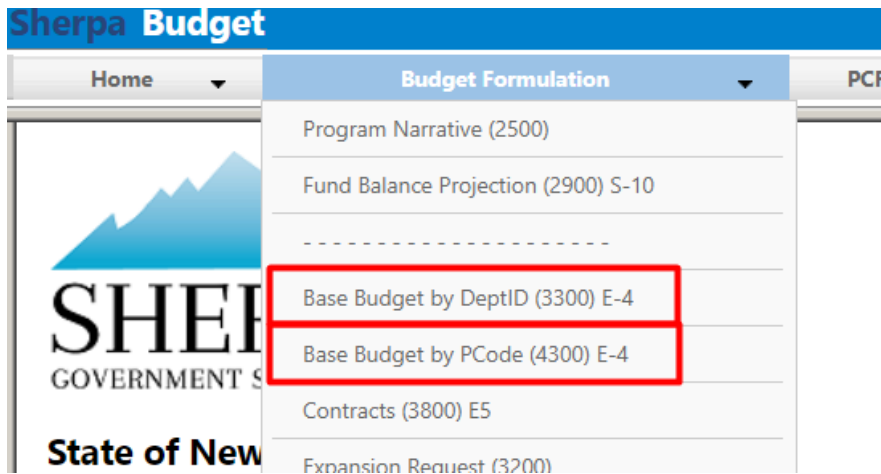
Base Budget E-4 by PCode, form 4300

The Base Budget by PCode will display data at the PCode Roll Up level 3.

8.1. Budget Form List Page

The follow sections provide detailed instructions for navigation and actions for the Base Budget form(s). The functions and features outlined in these sections will be available in other budget forms as well.

8.1.1. Select the appropriate **Base Budget E-4** form (either Base Budget by Dept ID 3300 or Base Budget by PCode 4300) from the Budget Formulation menu. This user guide shows screenshots for the Base Budget by DeptID (3300) form, but the instructions apply to both forms.



8.1.2. Select an available form from the main Budget form screen or "List Page." This page will return a form for each agency or program based on your security. If there are no agencies or programs assigned for your security role, this list will be blank. If you believe there is an error in the list of agencies or programs available in your list, then contact the BFM Administrator to update your security role.

Base Budget - E4 (3300)

Quick Search: [Show Advanced Filters](#)

Record Actions:

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	2/20/2021	enduser	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail
4946	P539-R - Library Services	3301	P539-R	0	7/7/2020	u1	Submit	Header Detail
4947	P540-R - Program Support	3301	P540-R	0	7/7/2020	u1	Submit	Header Detail
5081	P761-R - Arts	3301	P761-R	0	7/7/2020	u1	Submit	Header Detail

Records per page: [▼](#) Records: 6 - Page: [1](#)

Most budget forms contain two Action options

- **Header** will open a tab that contains general and narrative data
- **Detail** will open a tab that contains budget data

8.1.3. To edit a form, users can click the **Header** or **Detail** buttons on the right side of the list.

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	2/20/2021	enduser	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail

8.2. Header Tab

The Header tab contains general data for the form instance. From the Header tab, you can navigate to other form tabs including Expenditure (or Detail) and Attachments.

Budget Form Header

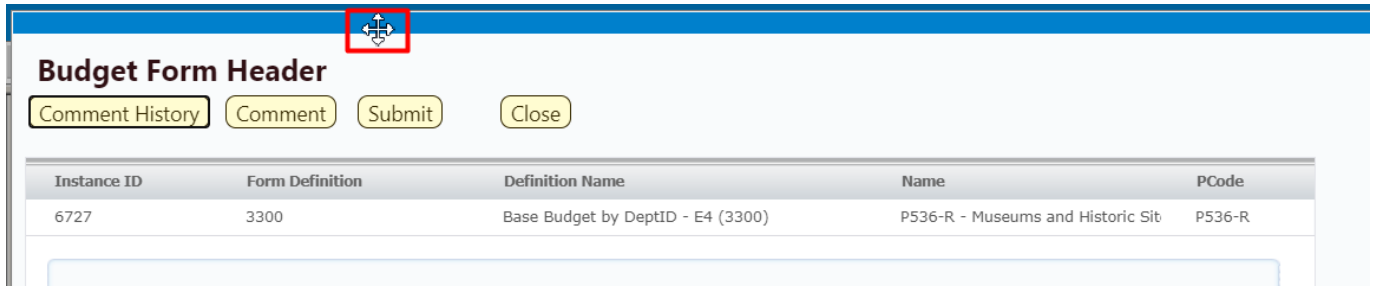
Instance ID	Form Definition	Definition Name	Name	PCode
4944	3300	Base Budget - E4 (3300)	P536-R - Museums and Historic Sit	P536-R

Stage Code:*
PCode:
Initial Entry Museums and Historic Sites

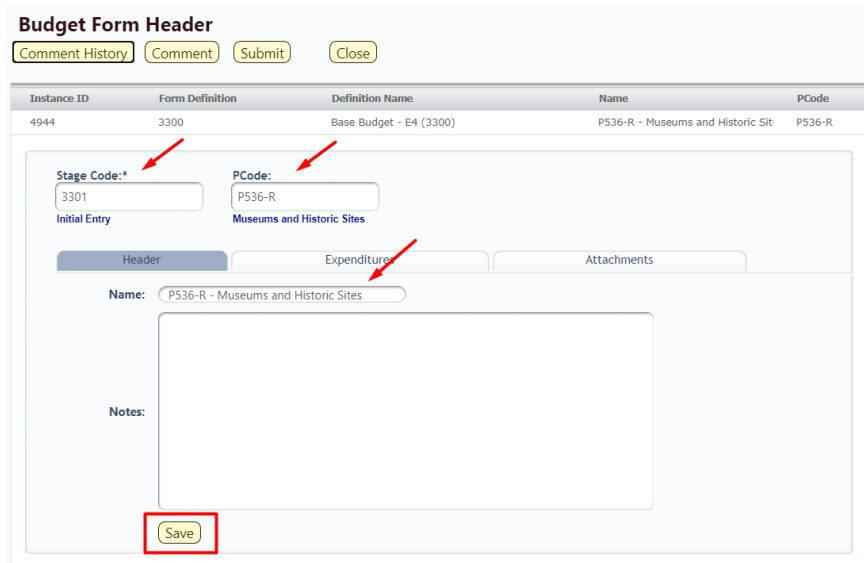
Name:

Notes:

Tip: Depending on computer screen size and resolution, sometimes budget forms may not appear centered on your screen. If you need to reposition the budget form, move the cursor to the blue bar at the top of the screen. The cursor symbol will change to a cross; then click and drag the form to the desired position.

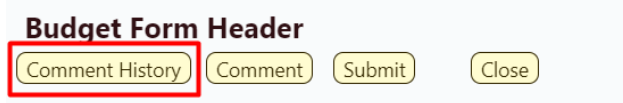


The Header tab data includes the PCode, Agency or Program Name, the Stage Code or workflow step, and a Notes field. To add Notes to the form, enter text into the field and click **Save**.

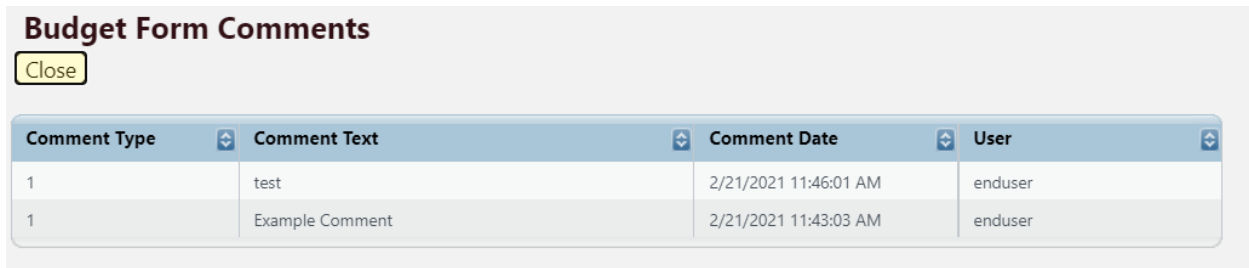


8.2.1. Comments

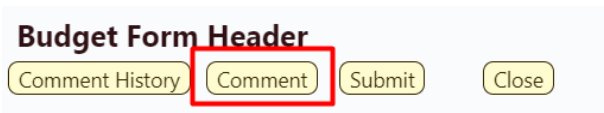
Click **Comment History** in the upper left corner to view any existing comments for the record.



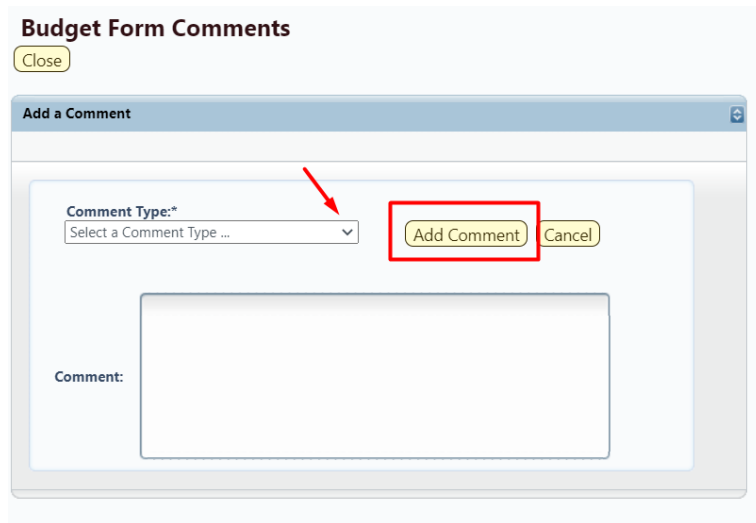
The Budget Form Comments screen will display all comments for the record. These comments are view only and cannot be edited. Click **Close** to return to the Header tab.



To add a comment to the form, from the Budget Form Header tab, click **Comment**.



On the Budget Form Comments screen, select *General* the Comment Type* drop down. Enter comment text into the field. Click **Add Comment** to save. These comments will appear in the Comment History. Comments cannot be edited or deleted by end users.



Click **Submit** will advance the form to the next step in the form workflow. This will be covered

8.3. Detail Tab

The Detail or Expenditures tab contains detailed budget request. Navigate to the Detail tab by clicking the Detail button on the budget form main screen.

Form ID	Description	Stage	PCode:	Form Rows	Last Update	Last User	Submit	Actions
4878	P114-R - Senate Chief Clerk	3301	P114-R	0	2/20/2021	enduser	Submit	Header Detail
4944	P536-R - Museums and Historic Sites	3301	P536-R	1544	2/4/2021	ralph.vincent	Submit	Header Detail
4945	P537-R - Preservation	3301	P537-R	0	7/7/2020	u1	Submit	Header Detail

A user can also navigate to the budget data details by clicking the Expenditures tab from the Budget Form Header tab. Note: The system executes a query once you click the tab which may take a few seconds for the screen to open. There is no hourglass.

Budget Form Header

Instance ID	Form Definition	Definition Name	Name	PCode
4944	3300	Base Budget - E4 (3300)	P536-R - Museums and Historic Sit	P536-R

Stage Code:* **PCode:**
Initial Entry Museums and Historic Sites

Name:

The budget form will load and the budget lines will be displayed.

Budget Form Lines

ID	Form	PCode:	Form Name	Personnel	Contractual	Other	Other Uses	Total Request
6727	3300	P536-R - Museums and Historic Sites	Base Budget by DeptID (330)	\$0	\$20,000	\$1,000	\$0	\$20,000

Quick Search:

Actions:

Row	Audit Trail	Department	Fund	Cat	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2019-20 Revised Budget	2019 - 20 Opbud*	PCF Proj Less Applied Vac Savings	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*
835		P536	19300	C200	520000	Payroll	0	20,172,100	21,841,700	0	\$0	0	0	0	0	0	
836		P536	19300	C400	540000	Other Expenses	0	5,166,900	5,869,964	0	\$0	0	0	0	0	0	
837		P536	19400	C400	540000	Other Expenses	0	505,700	583,438	0	\$0	0	0	0	0	0	
838		P536	25600	C400	540000	Other Expenses	0	26,800	26,800	0	\$0	0	0	0	0	0	
839		P536	53000	C400	540000	Other Expenses	0	0	687,713	0	\$0	0	0	0	0	0	
840		P536	61200	C400	540000	Other Expenses	0	1,000	1,000	0	\$0	0	0	0	0	0	
841		P536	89900	C400	540000	Other Expenses	0	43,700	123,700	0	\$0	0	0	0	0	0	
1		3000000000-50500	19301	C200	520100	Exempt Perm Positions P/T&S	50,161	0	0	0	\$1,235,880	0	0	0	0	0	
2		3000000000-50500	19301	C200	520200	Term Positions	74,344	0	0	0	\$31,230	0	0	0	0	0	
50		3000000000-50500	19305	C200	520200	Term Positions	231,708	0	0	0	\$338,872	0	0	0	0	0	
3		3000000000-50500	19301	C200	520300	Classified Perm Positions F/T	1,130,055	0	0	0	\$150,632	0	0	0	0	0	
4		3000000000-50500	19301	C200	520500	Temporary Positions F/T & P	2,268	0	0	0	\$0	0	0	0	0	0	
51		3000000000-50500	19305	C200	520500	Temporary Positions F/T & P	55,232	0	0	0	\$28,121	0	0	0	0	0	
5		3000000000-50500	19301	C200	520600	Paid Unused Sick Leave	3,379	0	0	0	\$0	0	0	0	0	0	
6		3000000000-50500	19301	C200	520700	Overtime & Other Premium	11,509	0	0	0	\$0	0	0	0	0	0	

Records per page: 50 | 1 - 50 of 841 - Pages: 166 | 1

The top table shows a read-only summary of the budget request by Category. The columns are described below.

Budget Form Lines

ID	Form	PCode:	Form Name	Personnel	Contractual	Other	Other Uses	Total Request
6727	3300	P536-R - Museums and Historic Sites	Base Budget by DeptID (330)	\$0	\$20,000	\$1,000	\$0	\$20,000

Screen:	Base Budget by Dept ID E4 3300 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID

Screen:	Base Budget by Dept ID E4 3300 Budget Form Lines
Field (Column Name)	Description
Form	Read Only. Form number
PCode	Read Only. PCode and Program Name
Form Name	Read Only. Form Name
Personnel	Read Only. Total for C200 Personal Service & Employee Benefits
Contractual	Read Only. Total for C300 Contractual Services (from Contracts E5 3800 form)
Other	Read Only. Total for C400 Other
Other Uses	Read Only. Total for C500 Other Financing Uses
Total Request	Read Only. Total request amount

The second table contains the budget request data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the Base Budget E4 by Department ID Form 3300.

Row	Audit Trail	Department	Fund	Cat	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2019-20 Revised Budget	2019 - 20 Opbud*	PCF Proj Less Applied Vac Savings	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*
835		P536	19300	C200	520000	Payroll	0	20,172,100	21,841,700	0	\$0	0	0	0	0	0	
836		P536	19300	C400	540000	Other Expenses	0	5,166,900	5,869,964	0	\$0	0	0	0	0	0	
837		P536	19400	C400	540000	Other Expenses	0	505,700	583,438	0	\$0	0	0	0	0	0	
838		P536	25600	C400	540000	Other Expenses	0	26,800	26,800	0	\$0	0	0	0	0	0	
839		P536	53000	C400	540000	Other Expenses	0	0	687,713	0	\$0	0	0	0	0	0	
840		P536	61200	C400	540000	Other Expenses	0	1,000	1,000	0	\$0	0	0	0	0	0	
841		P536	89900	C400	540000	Other Expenses	0	43,700	123,700	0	\$0	0	0	0	0	0	
1		3000000000-50500	19301	C200	520100	Exempt Perm Positions P/T&A	50,161	0	0	0	\$1,235,880	0	0	0	0	0	
2		3000000000-50500	19301	C200	520200	Term Positions	74,344	0	0	0	\$31,250	0	0	0	0	0	
50		3000000000-50500	19305	C200	520200	Term Positions	231,708	0	0	0	\$338,872	0	0	0	0	0	
3		3000000000-50500	19301	C200	520300	Classified Perm Positions F/T	1,130,055	0	0	0	\$150,632	0	0	0	0	0	
4		3000000000-50500	19301	C200	520500	Temporary Positions F/T & P	2,268	0	0	0	\$0	0	0	0	0	0	
51		3000000000-50500	19305	C200	520500	Temporary Positions F/T & P	55,232	0	0	0	\$28,121	0	0	0	0	0	
5		3000000000-50500	19301	C200	520600	Paid Unused Sick Leave	3,379	0	0	0	\$0	0	0	0	0	0	
6		3000000000-50500	19301	C200	520700	Overtime & Other Premium	11,509	0	0	0	\$0	0	0	0	0	0	

Screen:	Base Budget by Dept ID E4 3300 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
Department	Read Only. Contains PCode Number.
Department Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Fund	Read Only. Budget line for Fund
Fund Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Cat	Read Only. Budget line for Category code
Account	Read Only. Budget line for Account
Account Name	Read Only. Budget line for Account Name
20XX-XX Actuals	Read Only. Budget line for previous year Actuals data from SHARE
20XX-XX Adopted Budget	Read Only. Budget line for current year Adopted Budget data from SHARE







Screen:	Base Budget by Dept ID E4 3300 Budget Form Lines
Field (Column Name)	Description
20XX-XX Revised Budget	Read Only. Budget line for current year Revised Budget data from SHARE
20XX-XX OpBud*	Data Entry Column. Enter current year Operating Budget at the Dept ID / PCode level <i>Note: During the first year of using BFM, users must enter this amount. In future years, this will be pre-populated based on previous year's form data.</i>
PCF Proj Less Vac Savings	Read Only. Budget line for Personnel Cost Forecasting (PCF) amount less the Vacancy Savings calculated in Form 3700
20XX-XX GF Request*	Data Entry Column. Enter General Fund request
20XX-XX OSF Request*	Data Entry Column. Enter Other State Funds request
20XX-XX ISF/IAT Request*	Data Entry Column. Enter Internal Service Funds / Interagency Transfer request
20XX-XX FF Request*	Data Entry Column. Enter Federal Funds request
20XX-XX Total Request	Read Only. Sum of data entry requests columns.
Justification*	Entry Column. Enter text justification
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

Chart of Account Dimension Names

To reduce clutter on the data entry screen, some columns will be minimized to hide Chart of Account dimension names. These columns can be expanded to reveal the Chart of Account dimension names if needed. In the screenshot below, the blank spaces in the budget grid can be pulled to the right to reveal the names of the dimensions.

Row	Audit Trail	Department	Fund	Cat	Account	Account
4		p114	61200	C200	520000	Payroll
3		p114	19300	C200	520000	Payroll
2		p114	00000	C200	520000	Payroll
1		p114	0	C200	520000	Payroll
5		P114	61200	C400	540000	Other Exp
6		P114	61200	C400	546610	DOIT Tele

The screenshot below shows the Department Name and Fund Name columns expanded.

Row	Audit Trail	Department	Department Name	Fund	Fund Name	Ca
1851		P536	Museums and Historic Sit	19300	Office Of Cultural Affairs	C2
1855		P536	Museums and Historic Sit	53000	DCA ENTERPRISE FUND	C4
1852		P536	Museums and Historic Sit	19300	Office Of Cultural Affairs	C4
1856		P536	Museums and Historic Sit	61200	Bartlett Trust Fund	C4
1854		P536	Museums and Historic Sit	25600	DCA Museum Collections Fund	C4
1853		P536	Museums and Historic Sit	19400	15% St Mus Adm Fees/Fac Rental	C4
1857		P536	Museums and Historic Sit	89900	Farm&Ranch Registration Plate	C4

8.4. Excel Export/Import

BFM provides the ability for users to export and import budget forms via an Excel spreadsheet. This can streamline the budget data entry process, as formulas and other Excel tools can be leveraged to populate the budget form. In general, a user will export the budget form from BFM, make changes in Excel, and then import the spreadsheet back into BFM.

Important Note: The spreadsheet imported into BFM must follow the same format as the BFM export spreadsheet, that is the columns must match the same columns as on the BFM budget form. Below are the most reliable methodologies for creating an Import File:

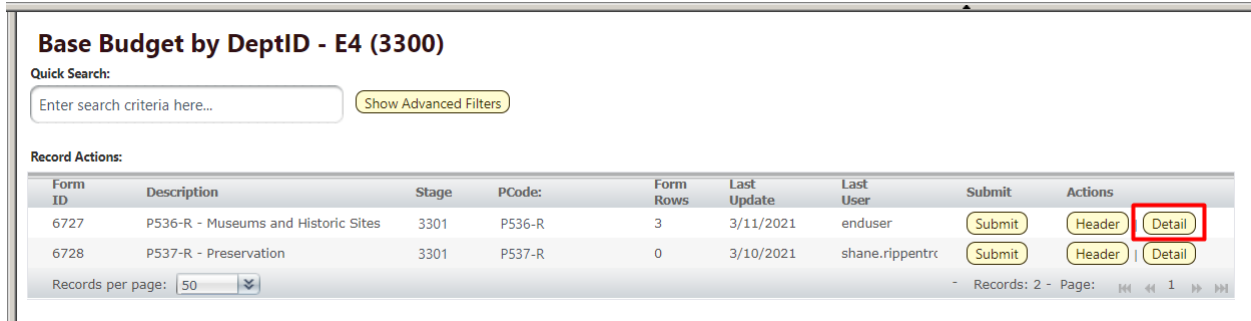
- Click **Export** in the budget form, then make your entries directly into the pre-formatted spreadsheet and **Import**.
- Click **Export** in the budget form. Make entries in other spreadsheets. Copy the values into the Export template once you are ready to **Import**.
- Click **Export** in the budget form. Use formulas to link those cells to the more elaborate source spreadsheets and upload the properly formatted file when ready.

The instructions below show a click-by-click guide for how to export, update, and import the spreadsheet.

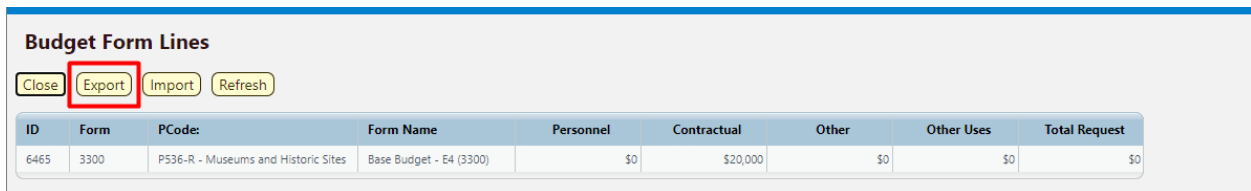
8.4.1. Go to Budget Formulation / Select the budget form.

8.4.2. Select the form instance you wish to update.

8.4.3. Click **Detail** (or navigate from the Header)

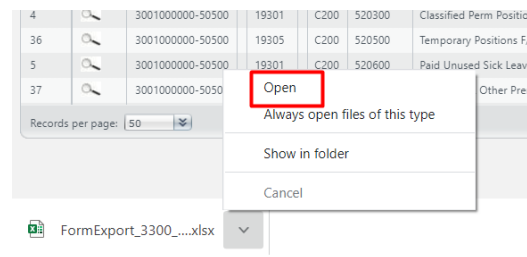


8.4.4. At the top of the page, click **Export**. If you do not see an Export button, that form may not allow for Imports.



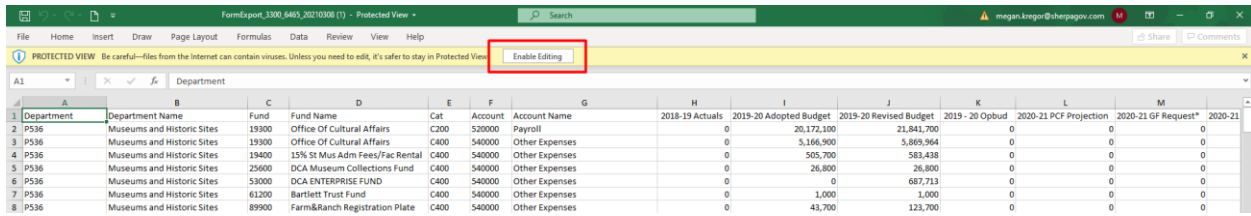
At this step, users may have different interactions depending on their settings for downloads. You may be prompted to **Open** or **Save** your file, or a default action has been selected in the past. The following example will follow choosing **Open**.

8.4.5. Click **Open**.



8.4.6. An Excel spreadsheet will open. There will be a yellow **'Protected View'** ribbon at the top of the spreadsheet. Click the **Enable Editing** button.

Note: you can eliminate this **Enable Editing** button from coming back by going to Excel: File/Options/Trust Center/Trust Center Settings/Protected View/uncheck everything.



You will not be able to make changes in the spreadsheet unless you enable the spreadsheet to accept edits.

8.4.7. Next, it is best to **Save As** the spreadsheet. The original spreadsheet is saved as read only since it comes from the internet. Click **File** on the ribbon.

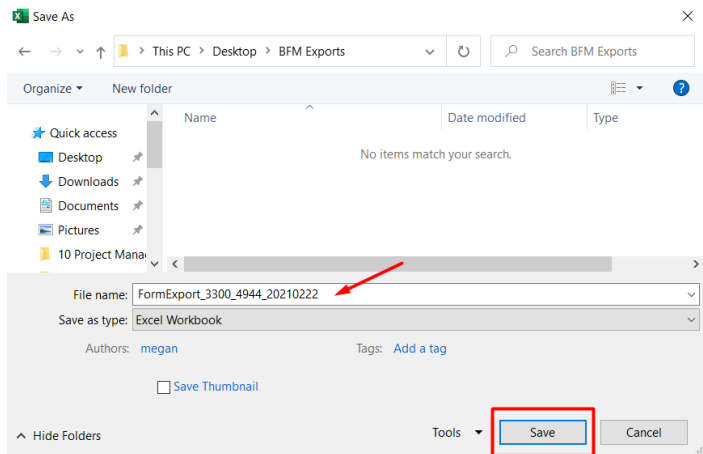
8.4.8. Then click **Save As**.

8.4.9. Choose a location to save the Excel worksheet where you can easily find it later. Keep the location simple since you will have to be able to find it again when you import. In the example below, a folder was created on the Desktop for BFM Exports.

8.4.10. Click in the **'File name:'** text box and name the Excel worksheet. Note that depending on your version of Excel this window may appear differently.

8.4.11. Click in the **'Save as type:'** menu and choose Excel Workbook (*.xlsx)

8.4.12. Click **Save**



8.5. Update Spreadsheet with Budget Values

The spreadsheet is exported in plain text, with no formatting applied. The screenshot below shows the header row with text-wrapping so that all columns could fit in the screenshot for this document. When a user opens the spreadsheet, s/he can apply the same formatting for ease of use, if desired.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
Department	Department Name	Fund	Fund Name	Cat	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2019-20 Revised Budget	2019 - 20 Opbud*	PCF Proj Less Applied Vac Savings	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*
1	Department																
2	P536	Museums and	19300	Office Of Cult	C200	520000	Payroll	0	20,172,100	21,841,700	0	0	0	0	0	0	0
3	P536	Museums and	19300	Office Of Cult	C400	540000	Other Expense	0	5,166,900	5,869,964	0	0	0	0	0	0	0
4	P536	Museums and	19400	15% St Mus Ad	C400	540000	Other Expense	0	505,700	583,438	0	0	0	0	0	0	0
5	P536	Museums and	25600	DCA Museum	C400	540000	Other Expense	0	26,800	26,800	0	0	0	0	0	0	0
6	P536	Museums and	53000	DCA ENTERPRI	C400	540000	Other Expense	0	0	687,713	0	0	0	0	0	0	0
7	P536	Museums and	61200	Bartlett Trust I	C400	540000	Other Expense	0	1,000	1,000	0	0	0	0	0	0	0
8	P536	Museums and	89900	Farm&Ranch R	C400	540000	Other Expense	0	43,700	123,700	0	0	0	0	0	0	0
9	3000000000-5C	National Hispa	19301	Office Of Cult	C200	520100	Exempt Perm	50,161	0	0	0	1,235,880	0	0	0	0	0
10	3000000000-5C	National Hispa	19301	Office Of Cult	C200	520200	Term Position	74,344	0	0	0	31,230	0	0	0	0	0

8.5.1. Get to know your spreadsheet.

- The spreadsheet above shows three rows of data. This is data that already exists on the form that was exported for this example. Depending on the state of your form, your spreadsheet may or may not have data.
- The columns of data consist of display columns and data entry columns, just like on the BFM form screen. Data entry columns are marked with an asterisk (*) next to the column heading and are outlined in green in the screenshot above. Data entered in these columns will be uploaded to the system during import.
- Display columns, such as the Actuals (column H) and the Adopted, Revised, and OpBud (columns I-K), are populated by data from other sources. These columns cannot be updated, just as on the BFM form screen, and if data is entered it will be ignored when imported.
- Columns with codes can be updated through the import. In the screenshot above, code columns include Department (column A), Fund (column C), and Account (column F). Name columns, such as Department Name (column B), Fund Name (column D) and Account Name (column G) exist to help users but will NOT be considered on Import. If you change text in a name column on an existing row, the change will be ignored on import.
- If you add a new row you do NOT have to include names in the name columns. When the spreadsheet is imported, the system will auto-populate the name fields based on the codes entered in the spreadsheet.
- If you change the text in an existing code column in the spreadsheet, BFM will import the change as a new row. The existing row will remain on the form, and a new row will be added with the new code and corresponding data added in the spreadsheet.
- If you create a duplicate of an existing budget line, only the single existing row will update as the system will aggregate the information during the import process.
- The number of columns and the order of columns **cannot** change. The BFM importer expects the exact file format that was exported. Do not add additional columns to the right or insert/delete columns (or if you do – put it back in this format prior to trying to import).

8.5.2. Make changes in your spreadsheet. Below are example changes:

- To **change** the request amounts in an existing row. Enter values into the data entry columns (M, N, O, P in the example). When the file is imported, BFM will load the new values.
- To **delete** data on the form, do not delete the row, instead **zero out the data** by entering a 0 in the cell. On import, the row will not be deleted, but the row will be zeroed out in the system.
- To **add justification text**, type in the columns that have text. If text exists on the export, type over the text in the cell. When the spreadsheet is imported, the previous text will be saved in the audit trail.

- To **add a new row**, insert a row in Excel. Populate the Chart of Accounts dimension codes, enter the requested amount in columns and text in Justification. Remember, you do not need to enter the Name columns (B, D, and G), as these will be auto populated by the system based on the codes entered.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	
	Department	Department Name	Fund	Fund Name	Cat	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2019-20 Revised Budget	2019 - 20 Opbud*	PCF Proj Less Applied Vac Savings	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*	
1	3000000000-50500		19301		C400	542500					778		1000						Expect increase in fuel costs

8.5.3. **Save** your spreadsheet.

8.6. Import Spreadsheet

Before importing, remember the number of columns and the order of columns must be the same as the spreadsheet exported from BFM. If you have made any change to the layout of the exported spreadsheet, reformat the spreadsheet to match the original layout before attempting to import.

8.6.1. Navigate to the correct budget form that you wish to import. From the Detail (Expenditure) tab on the budget form screen, click **Import**.

Budget Form Lines

Close
Export
Import
Refresh

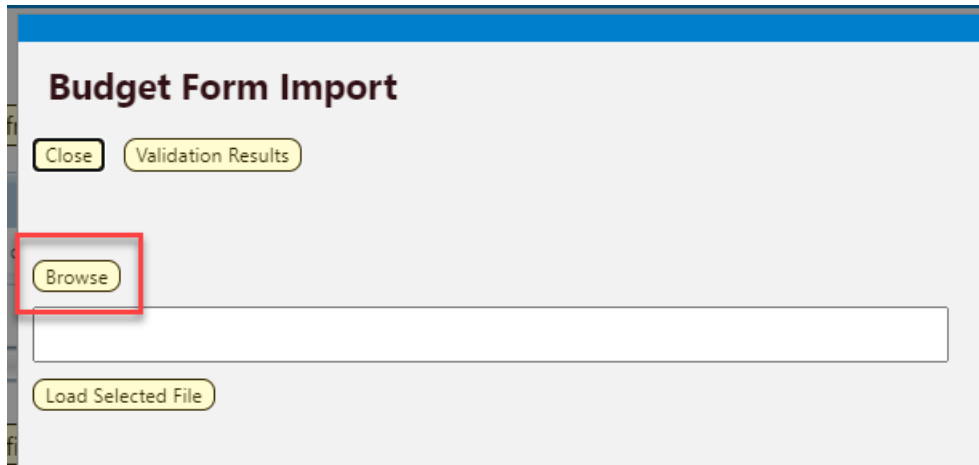
ID	Form	PCode:	Form Name	Personnel	Contractual	Other	Other Uses	Total Request
6727	3300	P536-R - Museums and Historic Sites	Base Budget by DeptID (330	\$0	\$20,000	\$0	\$0	\$20,000

Quick Search:

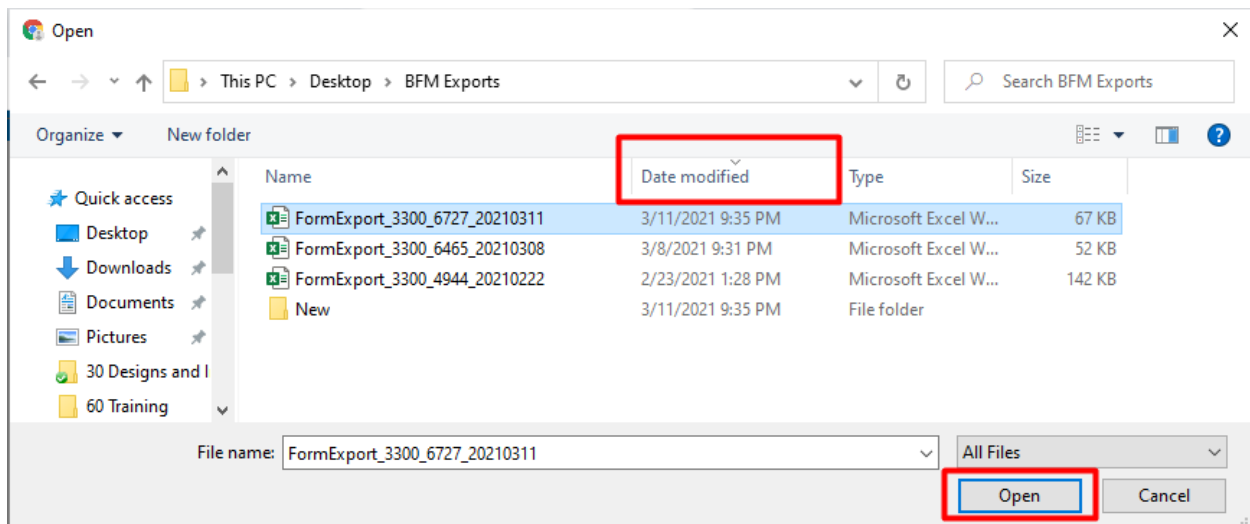
Actions:
Add New Copy

Row	Audit Trail	Department	Fund	Cat	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2019-20 Revised Budget	2019 - 20 Opbud*	PCF Proj Less Applied Vac Savings	2020-21 GF Request*	2020-21 OSF Request
835		P536	19300	C200	520000	Payroll	0	20,172,100	21,841,700	0	\$0	0	
836		P536	19300	C400	540000	Other Expenses	0	5,166,900	5,869,964	0	\$0	0	

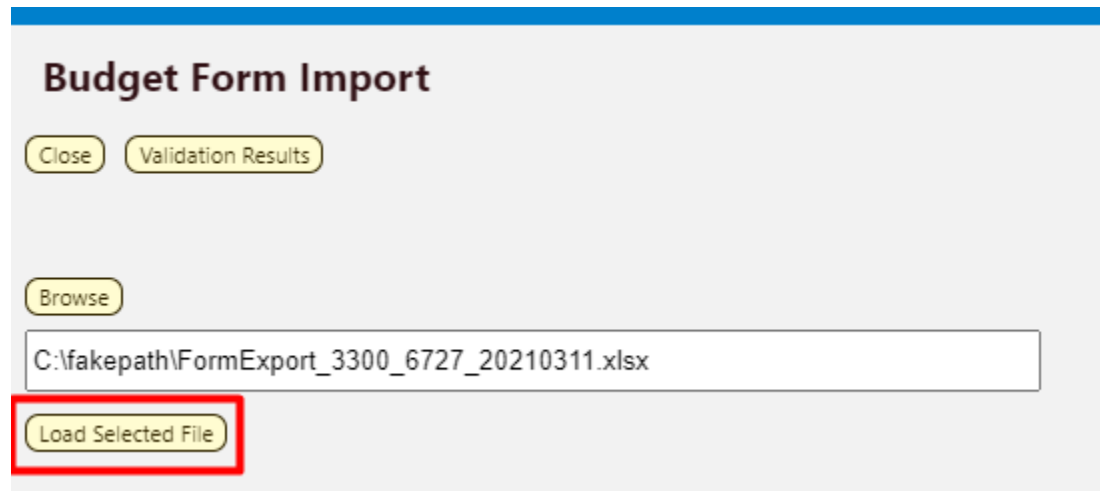
8.6.2. Click **Browse** and find your file.



Hint: click on Date Modified heading and the file you just saved will go to the top. If a file is open, it will have a second entry with a ~ prefix; do not select that file. You do NOT have to close the file to upload it.

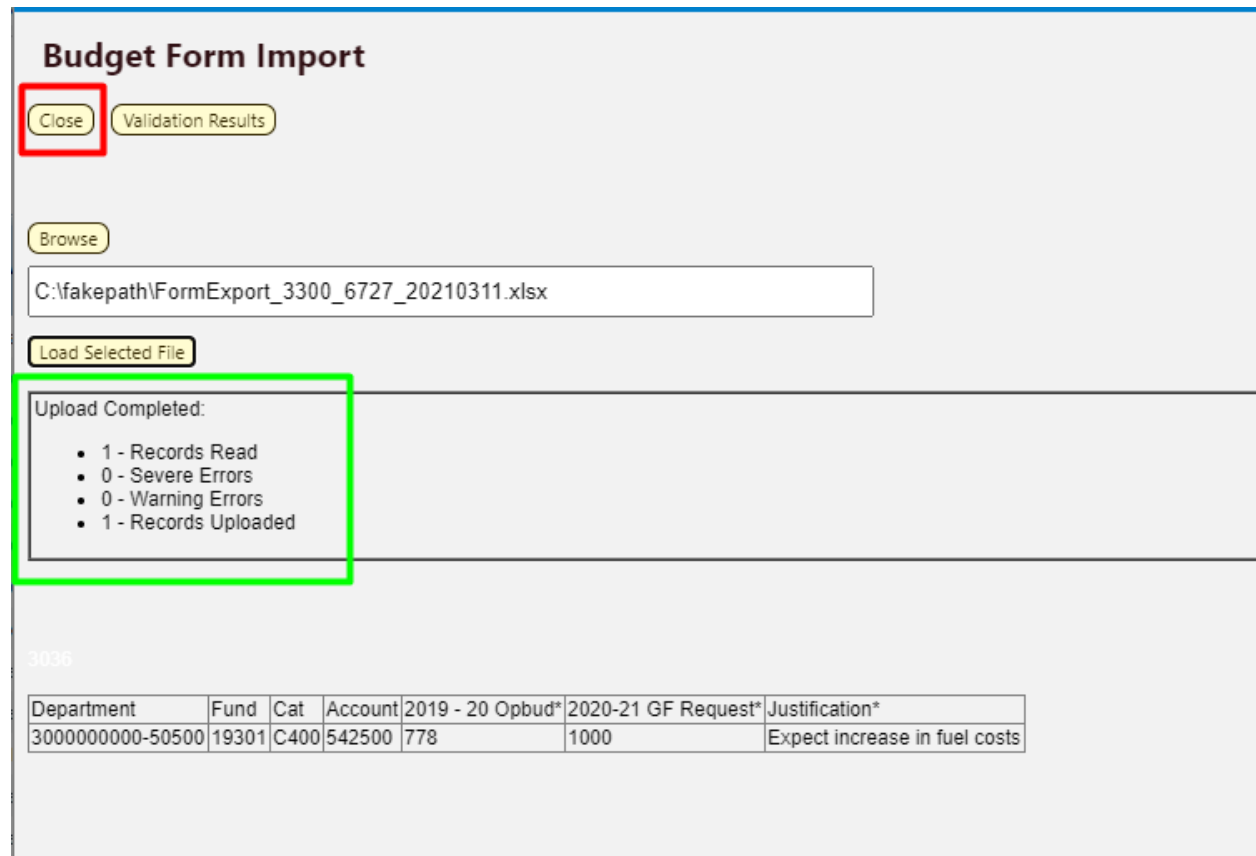


8.6.3. Click **Load Selected File**. If you see "fakepath" in the file name, this is just a browser security feature.



8.6.4. If the font returns in black it was successful. If there are errors the screen will have text returned in a red font. Review 8.7 [Import Notes](#) and 8.8 [Import Errors](#) for assistance in resolving errors.

8.6.5. Click **Close** in the upper left if you are successful.



Once you close the upload screen, you will see a *Loading...* message. The results will load shortly. The screenshot below shows the new row added to the spreadsheet in the example above. Note how the system auto-populated the Account Name field based on the Account code entered.

8.7. Import Notes

Leading Zeros

For some Line Sequence codes, leading zeros can be dropped by Excel. If your Line Sequence is 0002, the spreadsheet will show just 2 in many cases. This is ok. The import will add leading zeros back to the value so you can make your entries using just the 2 value.

Incomplete Files

You can load just one row or a series of rows and it will not harm existing rows. For example, you uploaded a 400 row spreadsheet three days ago, but someone may have made changes in BFM. You can Export/ Import or simply create an import file with the 3 rows that changed and import the smaller spreadsheet. It will apply the deltas to those new rows and leave all other rows remain untouched.

8.8. Import Errors

The below spreadsheet has invalid Department, Fund, and Account codes.

	A	B	C	D	E	F	G	H
1	Department	Department	Fund	Fund Name	Cat	Account	Account Name	2018
2		536	19300			520000		
3	p536		123456			520000		
4	p536		19300			5200		
5	P536	Museums and	19300	Office Of Cultural A	C200	520000	Payroll	
6	P536	Museums and	53000	DCA ENTERPRISE FI	C400	540000	Other Expenses	
7	P536	Museums and	19300	Office Of Cultural A	C400	540000	Other Expenses	
8	P536	Museums and	61200	Bartlett Trust Fund	C400	540000	Other Expenses	
9	P536	Museums and	25600	DCA Museum Colle	C400	540000	Other Expenses	
10	P536	Museums and	10400	15% St Mus Adm Ea	C400	540000	Other Expenses	

When you attempt to import a file that has any invalid codes or data, you will see an **Upload Failed** in red font with associated notes.

Budget Form Import

Close Validation Results

Browse

C:\fakepath\errors-worksheet.xlsx

Load Selected File

Upload Failed:

Troubleshooting Suggestion:

- Validation Issued Warnings or Errors - review the Validation Log

Upload Status:

- 1860 - Records Read
- 4 - Severe Errors
- 0 - Warning Errors
- 0 - Records Uploaded

NOTE:

- 1860 records were imported from the Excel file selected but NO RECORDS WERE UPLOADED. Validation encountered severe errors with one or more data elements.

8.8.1. Click on **Validation Results** button in the upper left.

Budget Form Import

Close **Validation Results**

Browse

C:\fakepath\errors-worksheet.xlsx

Load Selected File

Upload Failed:

Troubleshooting Suggestion:

8.8.2. **Review the upload validation message details.** Note that you may have multiple errors on one row since it failed multiple validations. In this example, Row 1 had an invalid PCode (Organization) value; Row 2 had an invalid Fund code; and Row 3 had an invalid Account.

Upload Validation Message Details

Export Close

Upload Row	Column Name	Column Value	Severity	Error
1	Organization	536	Severe	The Organization entered is not valid for your security profile.
2	Fund	123456	Severe	The Fund must exist on the Fund table and be Active and Postable.
3	Account	5200	Severe	The Account must exist on the Account table and be Active and Postable.
3	Account	5200	Severe	The Account code is not valid due to the filter for this budget form.

Records per page: 25 - Records: 4 - Page: 1

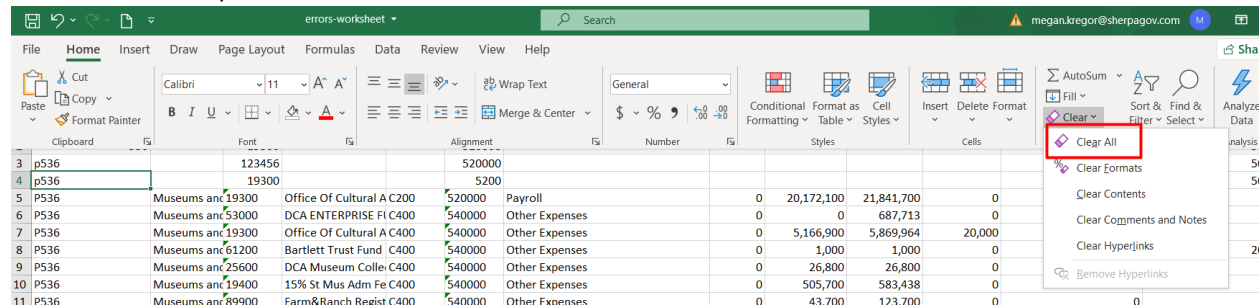
8.8.3. Return to the spreadsheet and make your corrections.

Invalid chart of accounts entries

Resolution: correct the entries or contact your BFM Administrator to have the chart of accounts added to BFM.

Blank rows at the end of the spreadsheet

Highlight the rows and choose Clear All. Clear all is in the Home ribbon in the upper right-hand corner, under the Clear option.



Values in a column not part of the upload, such as in column W

Highlight the cells and choose Clear All.

8.8.4. Re-import corrected file.

8.9. In-Line Editing – Existing Budget Entries

Budget request can be entered directly onto the screen, without using the Export/Import function described above.

8.9.1. Select a row to edit by either double clicking the row or clicking the Pencil icon on the right-hand side of the row.

8.9.2. Enter budget values or justification text into the text boxes that appear in the data entry columns,

denoted with an asterisk (*). Click the blue X in the last column to cancel data entry.

2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*	
0	0	0	1,000	1,000		
0	0	0	0	0		
0	0	0	10,000	10,000	matching Fed funds	
<input type="text" value="200"/>	<input type="text" value="200"/>	<input type="text" value="200"/>	<input type="text" value="200"/>	0	funding request example	
0	0	0	0	0		

8.9.3. Click **Save All** in the bottom right-hand corner.

Note: Once data has been entered into the row, the entered text will be red until the data is saved.

Important: The entries on the visible screen must be saved before moving on to another page. If the **Save All button** is not clicked before the **advance the page** is clicked, the changes on this page will **NOT be saved**.

P-21 tail iget	2020-21 PCF Projection	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*	
0	0	0	0	0	1,000	1,000		
0	0	0	0	0	0	0		
0	0	0	0	0	10,000	10,000	matching Fed funds	
0	0	200	200	200	200	0	funding request example	
0	0	0	0	0	0	0		
0	0	0	0	0	0	0		
0	0	0	0	1,000	0	1,000	test of import	
0	280,807	200,000	0	0	80,800	280,800		
0	31,230	31,200	31,200	31,200	0	93,600		
0	223,659	223,700	223,700	223,700	0	671,100		
0	0	0	0	0	0	0		
0	28,121	28,100	28,100	28,100	0	84,300		
0	0	0	0	0	0	0		
0	0	0	0	0	0	0		

Records: 1 - 50 of 1857 - Pages:

Once the data is saved, the Total Request column will be calculated by adding all request columns.

Note: BFM will automatically perform natural rounding for all entered values to the nearest 100.

2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*
0	0	0	1,000	1,000	
0	0	0	0	0	
0	0	0	10,000	10,000	matching Fed funds
0	200	200	200	800	funding request example

8.10. Audit Trail

Audit Trail stores the amount and text changes with the corresponding user and date timestamp.

8.10.1. Click on **Magnifying Glass** icon on a budget line.

The Budget Form Expense Line History window opens with complete audit of all budget line changes.

Below is a table with Audit Fields and Descriptions:

Budget Form Expense Line History	Budget Form/Magnifying Glass
Field	Description
Record Type	The source of the data.
Stage Code	The stage to where the amount by which you changed the data is posted.
Posting Code	The posting code used in SHARE. Most entries save to BUDGET; clnt_txt2, clnt_txt3 are the text entries.
Fiscal Year	The fiscal year.
Period	The fiscal period, it will generally be 0 to indicate we are not budgeting by month.
Last User	The user who saved the change.
Updated	The time and data stamp of the change.

Budget Form Expense Line History	Budget Form/Magnifying Glass
Field	Description
Amount	The amount by which you changed the data is posted. The sum of these amounts should reflect what is seen on the Details page.
Amount Justification/Comments	For Posting Codes = clnt_txt3, this displays line text. For all other entries, this displays the audit text.

8.10.2. Click **Close** button to return to list of budget lines.

8.11. Add New Budget Entry

8.11.1. From the Form Details (Expenditure) tab, click **Add New**.

Budget Form Lines

ID	Form	PCode:	Form Name	Personnel	Contra
4878	3300	P114-R - Senate Chief Clerk	Base Budget - E4 (3300)	\$8,000	

Quick Search:

Actions:

Row	Audit Trail	Department	Fund	Cat	Account	Account Name	2018-19 Actuals	2019 Actuals
4		p114	61200	C200	520000	Payroll	0	0
3		p114	19300	C200	520000	Payroll	0	0
2		p114	00000	C200	520000	Payroll	0	0
1		p114	0	C200	520000	Payroll	0	0
5		P114	61200	C400	546610	DOIT Telecommunications	0	0

Records per page: 50

8.11.2. Click the magnifying glass to search for the codes to be added.

Budget Form Entry - Add New Line

Page Actions: Close

Form ID	Form Definition
4878	3300

Save Cancel

Justification:

2020-21 GF Request*:
 Audit Text:

2020-21 OSF Request*:
 Audit Text:

2020-21 ISF/IAT Request*:
 Audit Text:

2020-21 FF Request*:
 Audit Text:

8.11.3. Click **Select** on any of the codes in the list. Note, you can also type in the code or name in the Quick Search, wait for one second, and then select from the filtered list.

Lookup

Quick Search: Cancel

Select	Code	Name
Select	0100000000-11400	Senate
Select	0200000000-11400	Operations
Select	P114	Senate Chief Clerk

Records: 1 - 3 of 3 - Pages: ⏪ ⏩ 1 ⏪ ⏩

- 8.11.4. Repeat for all Chart of Account dimensions in the budget form.
- 8.11.5. Enter an amount in the request field(s). **Note:** BFM will automatically perform natural rounding for all entered values to the nearest 100.
- 8.11.6. Click **Save**.

Budget Form Entry - Add New Line

Page Actions: Close

Form ID	Form Definition
4878	3300

Department: Senate Chief Clerk
 Fund:
 Account:
Save Cancel

Justification:

2020-21 GF Request*: Audit Text:

2020-21 OSF Request*: Audit Text:

2020-21 ISF/IAT Request*: Audit Text:

2020-21 FF Request*: Audit Text:

The new row will appear on your budget form.

Row	Audit Trail	Department	Fund	Cat	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2019-20 Revised Budget	2019 - 20 Detail Budget	2020-21 PCF Projection	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*	
4		p114	61200	C200	520000	Payroll	0	0	0	0	0	0	0	0	0	0	0	mk test
3		p114	19300	C200	520000	Payroll	0	0	0	0	0	0	0	0	0	0	0	mk test
2		p114	00000	C200	520000	Payroll	0	0	0	0	0	0	0	0	0	4,000	4,000	mk test 2
1		p114	0	C200	520000	Payroll	0	0	0	0	0	0	0	4,000	0	4,000	4,000	mk test 2
5		P114	61200	C400	540000	Other Expenses	0	0	0	0	0	10,000	0	0	0	10,000	10,000	example request
6		P114	61200	C400	546610	DOIT Telecommunications	0	0	0	0	0	0	20,000	2,000	0	22,000	22,000	More needed

8.11.7. To closing a Budget Form instance, click **Close** to return to the “List Page”, the main screen for the budget form.

Budget Form Lines

Close Export Import Refresh

ID	Form	PCode:	Form Name	Personnel
4878	3300	P114-R - Senate Chief Clerk	Base Budget - E4 (3300)	

Quick Search:

Actions: Add New Copy

Row	Audit Trail	Department	Fund	Cat	Account	Account Name	2018-19 Actuals
4		p114	61200	C200	520000	Payroll	0
3		p114	19300	C200	520000	Payroll	0
2		p114	00000	C200	520000	Payroll	0
1		p114	0	C200	520000	Payroll	0

8.12. Delete Existing Budget Entry

In order for the audit trail to be easy to follow, deleting rows is currently not allowed. Just type a zero (0) in any field you wish to 'delete' to zero out the data and delete any text and **Save All**.

8.12.1. Double Click Row

8.12.2. Enter 0 to zero out the amount field.

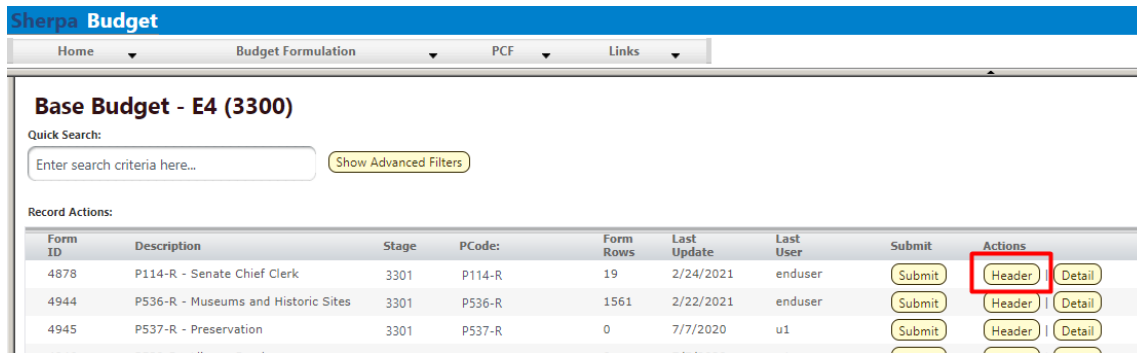
8.12.3. Click **Save All**.

8.12.4. **Alternatively, if a whole form needs to be zeroed out, Import/Export functionality can be used. A form can be exported, all rows set to 0, and then imported.**

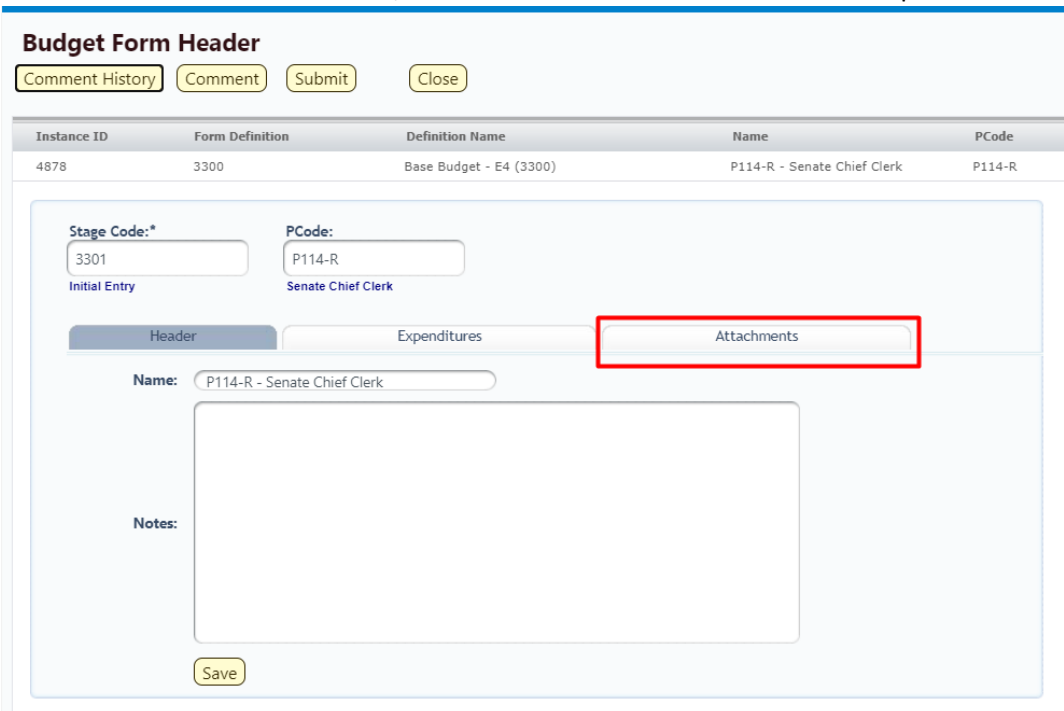
8.13. Attachments Tab

Attachments can be added to Budget Forms.

8.13.1. From the main budget form screen, or “List Page,” click **Header**.

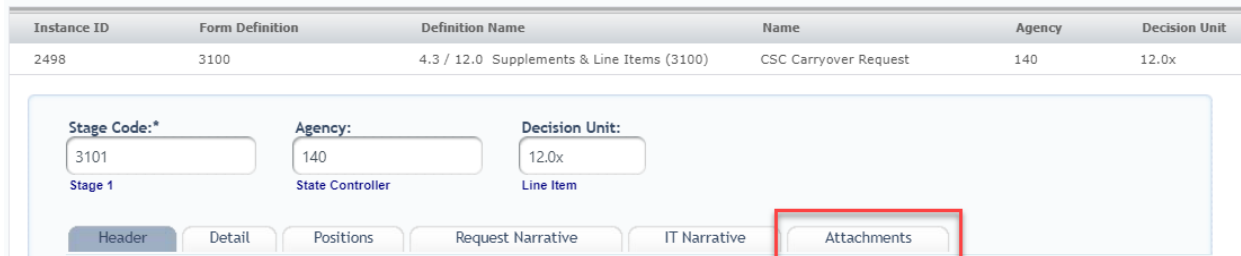


8.13.2. Once on the Header tab, locate the **Attachments** tab and click to open.

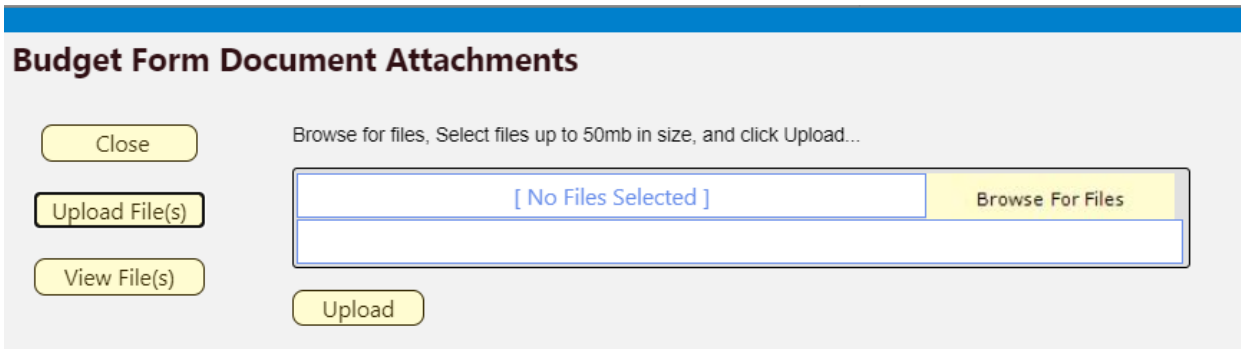


Budget Header – Attachments tab

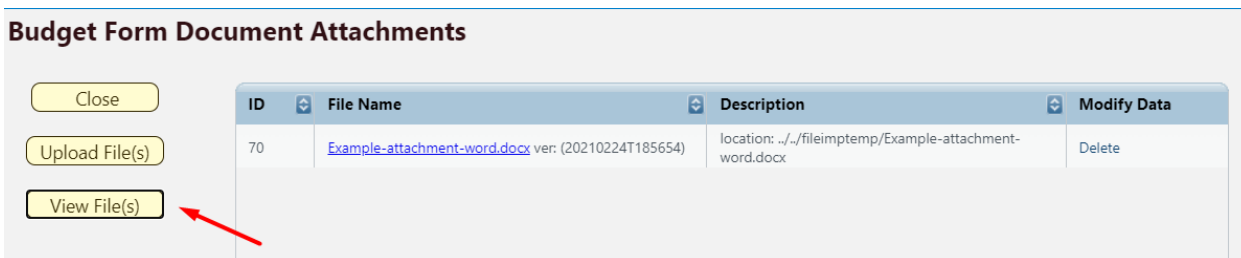
The Attachments tab contains the documents attached to the form. There are pre-defined file types that are acceptable for uploads. If a file you want to upload is not a valid file type, contact your BFM Administrator to request additional file types to be added.



- 8.13.3. Click the **Attachments** tab.
- 8.13.4. Click the **Upload File(s)** button
- 8.13.5. Click **Browse For Files** to open Folder Structure. If you get an Active X warning, please contact your system administrator. You will not be able to upload a file until a change is made to your Internet Explorer.
- 8.13.6. Select the file to attach. Currently Word, Excel, and PDF are supported file types.
- 8.13.7. Click **Upload** button. You will get a confirmation when your file uploads.

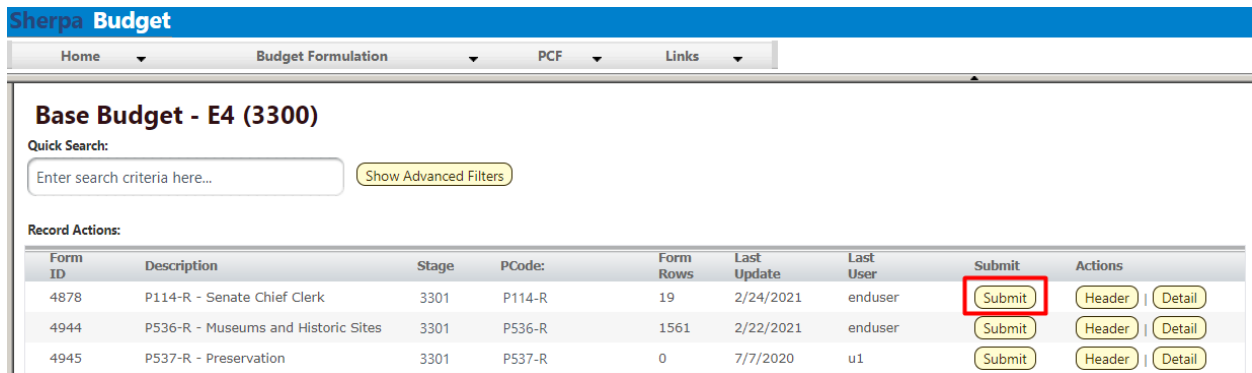


- 8.13.8. Click on **View Files** to see attachments that are on this form.

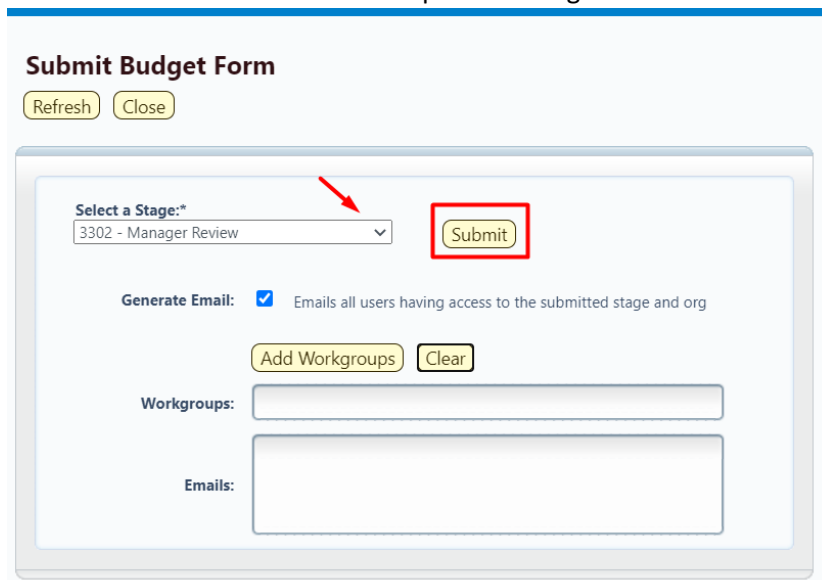


8.14. Submit Budget Form

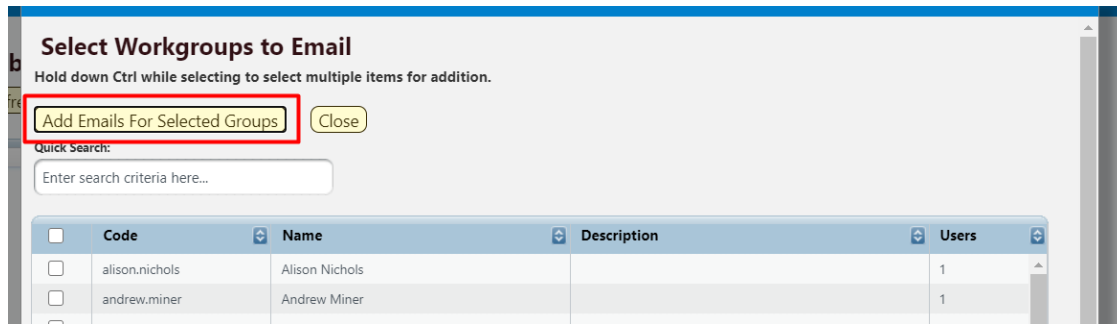
Submission allows users to move a form instance to a different stage. A user can have access to submit a form instance to a stage even without the security rights to edit the form at the submission stage.



- 8.14.1. Select your budget form definition.
- 8.14.2. For the instance you wish to submit, click the **Submit** button on the main budget form screen or “List Page”.
- 8.14.3. On the Submit Budget Form screen, **Select a Stage** from the dropdown menu. Based on individual security settings, this dropdown will display which stages you have access to submit to. If you do not see a Stage Code, this means you do not have security to submit. Note: depending on your security permissions, you may be able to submit a form to a prior stage, that is send it back to the previous stage.



- 8.14.4. **Generate Email (Checkbox)** – If this is checked upon submit, a notification will be generated to the individual(s) who have stage and organization access at the submitted stage.
- 8.14.5. **Workgroups** – This can be used to select individual users to be notified that a budget form was submitted to the selected stage. This option ignores stage and organization security. Click **Add Workgroups** and use the list to select the users who should receive an email notification. Click **Add Emails for Selected Groups**. The Workgroup and Emails will appear in the corresponding fields on the Submit Budget Form screen.



8.14.6. Click **Submit**.

Once submitted, the budget request will no longer be visible on the Budget Forms List Page if the user does not have security rights to edit at the new stage. If the form needs to be edited, contact the BFM Administrator to request the form be reverted to the appropriate stage.

8.15. Reports

Data from the Base Budget E-4 3300 form can be viewed in the S-8 Financial Summary and S-9 Account Code Summary. See Section 21 [BFM Reporting](#) for instructions on how to access reports.

9. Contracts E-5

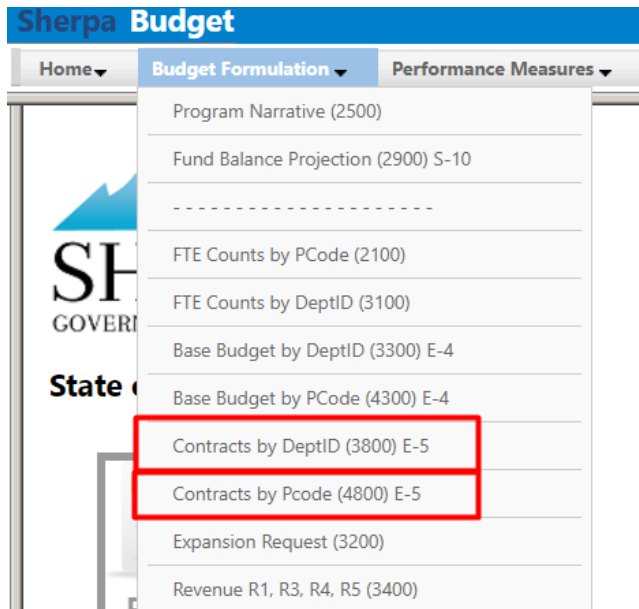
The Contracts E-5 form will be used to submit appropriation requests for contractual services and provide a detailed listing of contractual agreements by contract purpose.

Similar to the Base Budget E-4 forms, BFM has two Contracts E-5 forms available: Contracts by DeptID form 3800 and Contracts by PCode form 4800. Agencies will select one form, either by DeptID 3800 or by PCode 4800, for each PCode to complete and submit for appropriations request.

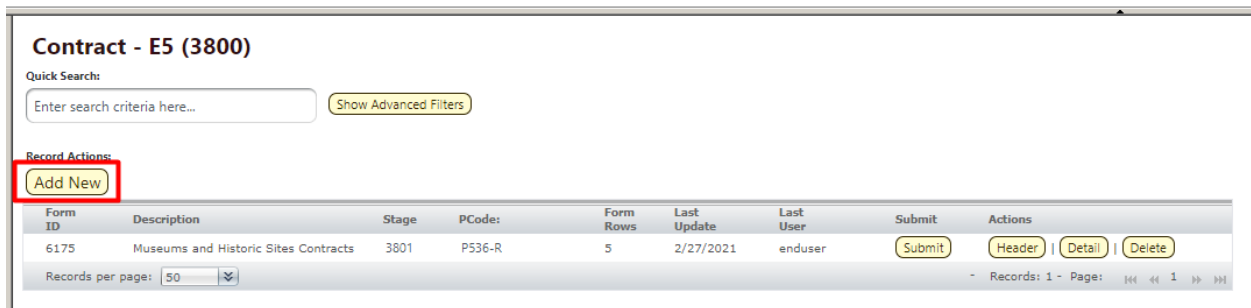
The following instructions show screenshots for the Contracts by Dept ID 3800 form, but these instructions apply to both Contracts forms.

9.1. Create New Contracts Form

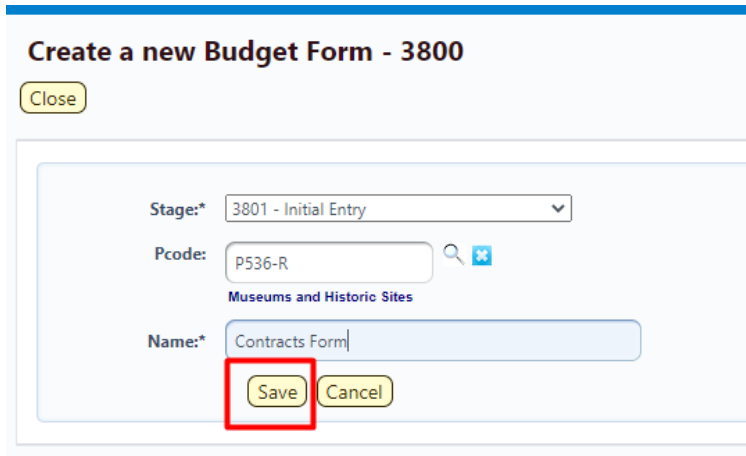
9.1.1. Navigate to the Contracts form by hovering over the **Budget Formulation** menu and select the appropriate **Contracts E-5** form from the dropdown menu.



9.1.2. Click **Add New** to begin a new form. Alternatively, click **Detail** for an existing form to edit and proceed to step 9.1.5.



9.1.3. Select **Stage Code 3801 – Initial Entry** from the dropdown. Enter the **PCode** and **Name** of the Contract form. Click **Save**.



9.1.4. The budget form header will load. Click Contracts to load the Details screen.

Budget Form Header

Instance ID	Form Definition	Definition Name	Name	PCode
6466	3800	Contract - E5 (3800)	Contracts Form	P536-R

Stage Code*: PCode:
 Initial Entry:

Name:

Notes:

9.1.5. The budget form will load.

Budget Form Lines

ID	Form	PCode:	Form Name	Total Request
6175	3800	P536-R - Museums and Historic Sites	Contract - E5 (3800)	\$0

Quick Search:

Actions:

Row	Audit Trail	Department	Fund	Account	Account Name	#	Contract Purpose	2018-19 Account Actuals	2019-20 Account Budget	2018-19 Contract Actuals*	2019-20 Contract Budget*	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*
50		P536	89900	530000	Contracts	1000		0	\$6,200	0	0	0	0	0	0	0	
49		P536	19300	530000	Contracts	1000		0	\$1,074,400	0	0	0	0	0	0	0	
1			3001000000-50500	19301	533300	Other Services	1000	25,835	\$0	0	0	0	0	0	0	0	
2			3001000000-50500	19305	533300	Other Services	1000	40,947	\$0	0	0	0	0	0	0	0	
3			3001015000-50500	19301	533300	Other Services	1000	727	\$0	0	0	0	0	0	0	0	
4			3004000000-50500	19305	533200	Professional Service	1000	12,000	\$0	0	0	0	0	0	0	0	
5			3004000000-50500	19305	533300	Other Services	1000	2,000	\$0	0	0	0	0	0	0	0	
6			3005000000-50500	19305	533200	Professional Service	1000	18,000	\$0	0	0	0	0	0	0	0	
7			3005000000-50500	19305	533300	Other Services	1000	78,000	\$0	0	0	0	0	0	0	0	
8			4001000000-50500	19301	533300	Other Services	1000	7,323	\$0	0	0	0	0	0	0	0	
10			4005000000-50500	19305	533300	Other Services	1000	115,571	\$0	0	0	0	0	0	0	0	
9			4005000000-50500	19301	533300	Other Services	1000	19,830	\$0	0	0	0	0	0	0	0	
11			4008000000-50500	19301	533300	Other Services	1000	51,500	\$0	0	0	0	0	0	0	0	
12			4201000000-50500	19301	533300	Other Services	1000	5,292	\$0	0	0	0	0	0	0	0	
13			4201000000-50500	19305	533300	Other Services	1000	2,065	\$0	0	0	0	0	0	0	0	

Records per page: 50 | Records: 1 - 50 of 50 - Pages: 1 | 1

The top table shows a read-only summary of form. The columns are described below.

Budget Form Lines

ID	Form	PCode:	Form Name	Total Request
6175	3800	P536-R - Museums and Historic Sites	Contract - E5 (3800)	\$0

Screen:	Contract E-5 3800 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
PCode	Read Only. PCode and Program Name
Form Name	Read Only. Form Name
Total Request	Read Only. Total request amount for form

The second table contains the budget request data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the Contracts E-5 form.

[Add New](#) [Copy](#)

Row	Audit Trail	Department	Fund	Account	Account Name	#	Contract Purpose	2018-19 Account Actuals	2019-20 Account Budget	2018-19 Contract Actuals*	2019-20 Contract Budget*	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*
50		P536	69900	530000	Contracts	1000		0	\$6,200	0	0	0	0	0	0	0	
49		P536	19300	530000	Contracts	1000		0	\$1,074,400	0	0	0	0	0	0	0	
1		3001000000-50500	19301	535300	Other Services	1000		25,835	\$0	0	0	0	0	0	0	0	
2		3001000000-50500	19305	535300	Other Services	1000		40,947	\$0	0	0	0	0	0	0	0	
3		3001015000-50500	19301	535300	Other Services	1000		727	\$0	0	0	0	0	0	0	0	
4		3004000000-50500	19305	535200	Professional Service	1000		12,000	\$0	0	0	0	0	0	0	0	
5		3004000000-50500	19305	535300	Other Services	1000		2,000	\$0	0	0	0	0	0	0	0	
6		3005000000-50500	19305	535200	Professional Service	1000		18,000	\$0	0	0	0	0	0	0	0	
7		3005000000-50500	19305	535300	Other Services	1000		78,000	\$0	0	0	0	0	0	0	0	
8		4001000000-50500	19301	535300	Other Services	1000		7,323	\$0	0	0	0	0	0	0	0	
10		4005000000-50500	19305	535300	Other Services	1000		115,571	\$0	0	0	0	0	0	0	0	
9		4005000000-50500	19301	535300	Other Services	1000		19,830	\$0	0	0	0	0	0	0	0	
11		4008000000-50500	19301	535300	Other Services	1000		51,500	\$0	0	0	0	0	0	0	0	
12		4201000000-50500	19301	535300	Other Services	1000		5,282	\$0	0	0	0	0	0	0	0	
13		4201000000-50500	19305	535300	Other Services	1000		2,065	\$0	0	0	0	0	0	0	0	

Records per page: 50 | [Records 1 - 50 of 50 - Pages: 144 | 41 | 1](#)

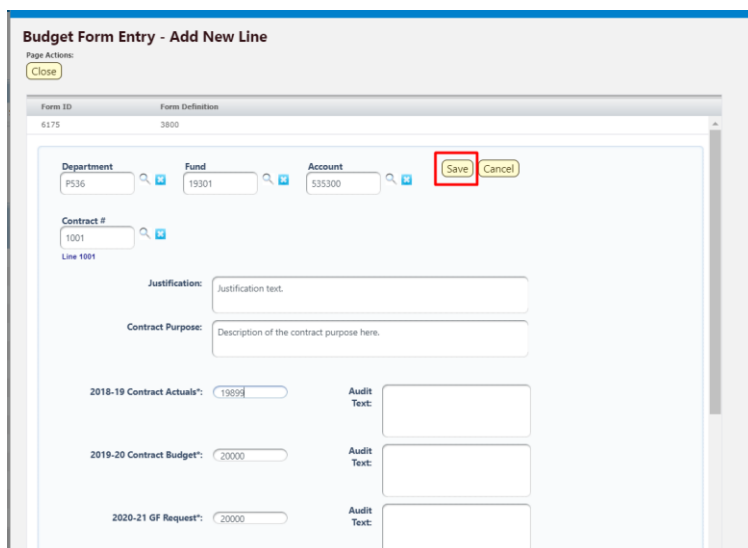
Screen:	Contract E-5 3800 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
Department	Read Only. Contains PCode Number.
Department Name	Read Only. <i>This column is minimized, use double arrows to expand.</i>
Fund	Read Only. Budget line for Fund
Fund Name	Read Only. <i>This column is minimized, use double arrows to expand.</i>
Account	Read Only. Budget line for Account
Account Name	Read Only. Budget line for Account Name
#	Read Only. Line item number for each new contract added.
Contract Purpose*	Data Entry Column. Enter description of contract purpose
20XX-XX Account Actuals	Read Only. Budget line for previous year Account Actuals data from SHARE
20XX-XX Account Budget	Read Only. Budget line for current year Account Budget data from SHARE
20XX-XX Contract Actuals *	Data Entry Column. Enter previous year Contract Actuals data by contract
20XX-XX Contract Budget*	Data Entry Column. Enter current year Contract Budget by contract

Screen:	Contract E-5 3800 Budget Form Lines
Field (Column Name)	Description
20XX-XX GF Request*	Data Entry Column. Enter General Fund request by contract
20XX-XX OSF Request*	Data Entry Column. Enter Other State Funds request by contract
20XX-XX ISF/IAT Request*	Data Entry Column. Enter Internal Service Funds / Interagency Transfer request by contract
20XX-XX FF Request*	Data Entry Column. Enter Federal Funds request by contract
20XX-XX Total Request	Read Only. Sum of data entry requests columns
Justification*	Entry Column. Enter text justification
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

9.1.6. Enter data into the budget form following the instructions from Section 8.4 [Excel Export/Import](#) or Section 8.11 [Add New Budget Entry](#).

To complete this budget form, enter a new line for each contract by clicking **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet.

- Enter the Department, Fund, and Account Numbers
- Enter a new line number in Contract #, for example 1001, 1002, 1003, etc.
- Enter the Justification
- Enter a description of the Contract Purpose
- Enter the previous fiscal year’s Contract Actuals amount by contract
- Enter the current Contract Budget amount by contract
- Enter the Budget request by funding source for each contract



9.1.7. Click **Save**. The new line item will appear in the list.

Row	Audit Trail	Department	Fund	Account	Account Name	#	Contract Purpose	2018-19 Account Actuals	2019-20 Account Budget	2018-19 Contract Actuals*	2019-20 Contract Budget*	2020-21 GF Request*	2020-21 OSF Request*	2020-21 ISF/IAT Request*	2020-21 FF Request*	2020-21 Total Request	Justification*
50		P536	89900	530000	Contracts	1000		0	\$6,200	0	0	0	0	0	0	0	
49		P536	18300	530000	Contracts	1000		0	\$1,074,400	0	0	0	0	0	0	0	
51		P536	18901	535300	Other Services	1001	Description of the contract purpose here.	0	\$0	19,900	20,000	20,000	0	0	0	20,000	Justification text.

9.1.8. Once all contracts have been added to the form, submit Budget form following instructions from 8.14 [Submit Budget Form](#).

9.2. Reports

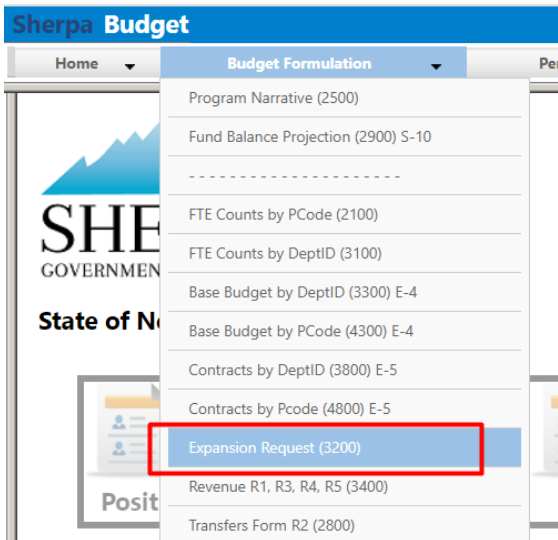
9.2.1. Data from the Contracts E5 3800 form can be viewed in the S-8 Financial Summary and S-9 Account Code Summary. See Section 21 [BFM Reporting](#) for instructions on how to access reports.

10. Expansion Request

Expansion requests are designed to expand the scope or scale of an agency’s service delivery system. These requests are for recurring expenditures. If you are requesting new FTE for your agency, you will utilize the Expansion Request form.

10.1. Create New Expansion Request

10.1.1. Navigate to the Expansion Request form by hovering over the **Budget Formulation** menu and selecting **Expansion Request (3200)** from the dropdown menu.



10.1.2. Click **Add New** to begin a new Expansion Request or select the form instance to edit and click **Header** to open the budget form.

Expansion Request (3200)

Quick Search: [Show Advanced Filters](#)

Record Actions: [Add New](#)

Form ID	Description	Stage	PCode-R	Form Rows	Last Update	Last User	Submit	Actions
5659	Test	3201	P536-R	12	2/25/2021	shane.rippentrc	Submit	Header Detail Delete
5666	Test - NM	3201	P536-R	18	2/18/2021	ralph.vincent	Submit	Header Detail Delete

Records per page: 50 | Records: 2 - Page: 1

10.1.3. On the Create a new Budget Form 3200 screen, select **Stage Code 3201 – Initial Entry** from the dropdown. Enter the **PCode** and **Name** of the Expansion Request. Click **Save**.

Create a new Budget Form - 3200

[Close](#)

Stage:* 3201 - Initial Entry

PCode: P537-R

Preservation

Name:* Example Expansion Request

[Save](#) [Cancel](#)

10.2. Header Tab

10.2.1. The new Expansion Request form will open to the **Header tab**. Complete the Header fields including a Description and Rank. Check boxes next to **Analyst Recommended**, **Include in Gov Budget**, and **LFC Approved**, if necessary. Click **Save**.

Budget Form Header

[Comment History](#) [Comment](#) [Submit](#) [Close](#)

Instance ID	Form Definition	Definition Name	Name	PCode
6192	3200	Expansion Request (3200)	Example Expansion Request	P537-R

Stage Code:* 3201 **Initial Entry** PCode: P537-R **Preservation**

[Header](#) [Request](#) [Position Tab](#) [Explanation](#) [Analyst's Comments](#) [Attachments](#)

Expansion Name: Example Expansion Request [Save](#)

Brief Description:

Rank: 1

Analyst Recommended:

Include in Gov Budget:

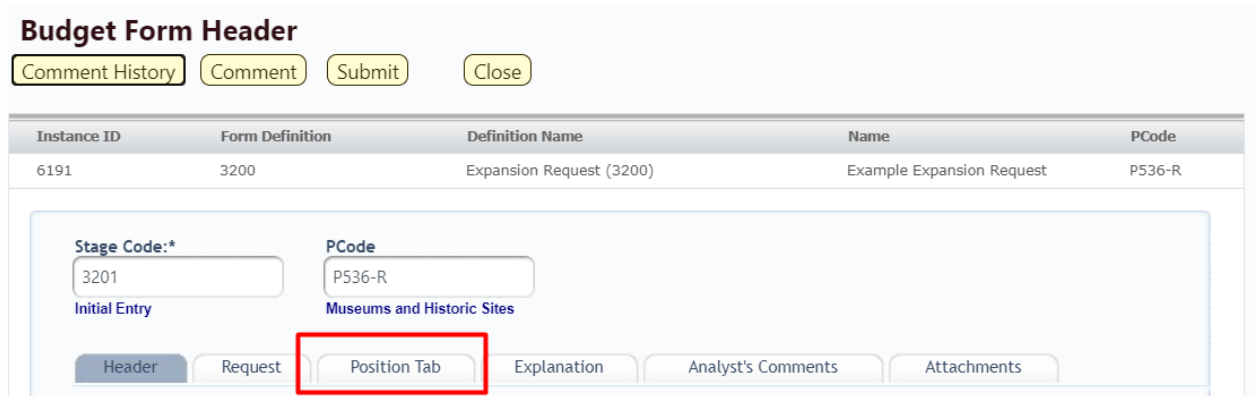
LFC Approved:

Notice the additional tabs on the Expansion Request form including Request which

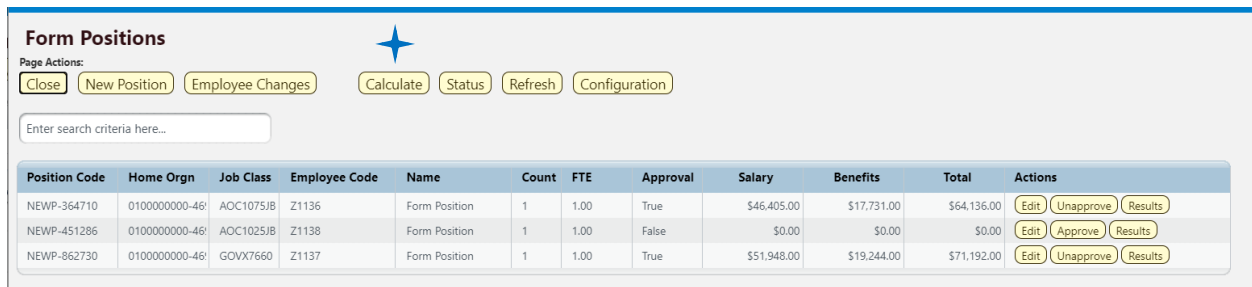
10.3. Position Tab

The Position Tab appears on the Expansion Request budget form and can be used for different purposes. On this tab, new positions can be requested, existing positions can be reclassified, and Group/Temp positions can be requested.

10.3.1. Navigate from the Header tab; locate the **Position Tab** and click to open.



10.4. Position Tab Overview



Calculate ★ - If no changes or additional allocations are needed, click the calculate button to calculate the salary and benefit amounts. The totals will feed over to the Details (Request) tab. **Note: Calculating can take 45 seconds or longer. If you select "Calculate" again, the system restarts the calculation from the beginning, so only select "Calculate" once.**

Data Fields/columns on the Position Tab Summary Overview Screen:

1. **Position Code** – A unique number generated by the system for each position request.
2. **Home Orgn** – The Home Organization or Department of the requested position.
3. **Job Class** – The job class and title selected in the initial request set-up.
4. **Employee Code** – Employee is the system generated number for the position request. Z in the number signifies a vacant position.
5. **Name** – Name of the Position, if it is a new position, Form Position will appear.
6. **Count** – Number of positions requested for this FTE.

7. **FTE** – Full Time Equivalent refers to the specific job class or position that is being requested, 1.0 is full-time, .5 is part-time.
8. **Approval** – True will appear in this field if the position has been approved and the salary, benefits and totals columns will reflect what has been requested. Once unapproved the field will reflect False and the salary, benefits and totals will appear as zero.
9. **Salary** – The salary requested for the position.
10. **Benefits** – These are the calculated benefits for the position requested.
11. **Total** – Total cost of the position(s) requested.

Record Action Buttons (light yellow buttons)

1. **Close** – Will close the screen and go back to a screen where all the tabs will appear to make the next selection.
2. **New Position** – This will start the process of requesting a new position and all the appropriate codes.
3. **Calculate** – When initially entering a position or changing some data in an existing position request, calculate will update the numbers in the request. This may take a few seconds to provide the update. Pressing the “Calculate” button will calculate the salary and benefit amounts and push them over to the detail tab.

Note: Calculating can take 45 seconds or longer. If you select “Calculate” again, the system restarts the calculation from the beginning, so only select “Calculate” once.

4. **Status** – Shows the history of the Projection calculation, including the status, date, and runtime of each time the Calculate button is clicked by any user.
5. **Refresh** – As with other screens, this will refresh any data changes to the position request.
6. **Edit** – This provides a method to update the position request. More information below.
7. **Unapprove** – This provides the option to unapprove a position request. When the “Unapprove” button is visible on the position line item, this indicates the position has been approved and the salary and benefit amounts will show on this screen. Selecting this button will unapprove the position and a box will come up to ensure the action to unapprove the position is desired. Once selected, the button will change to Approve and the salary and benefits will go to zero.
8. **Approve** – When the approved button is visible, there will be no costs for the position populated. This indicates the position request has NOT been approved. Costs will only show if the position has been approved.

Note: A position can be approved or unapproved at any time. If not approved, the dollars will not transfer over to the Detail Tab.

9. **Results** – Opens the Projected Employee Results screen, which provides the complete breakdown of benefit costs and salary for the line item position request. The Results screen shown below will only display for “approved” positions.

Note: The Total reflected on the Projected Employee Results screen, highlighted with a red box below, will feed to the PCF Total in the Detail (Request) Tab. To review the detail of the position request, return to the Position Tab for a breakdown.

Projected Employee Results

Record Actions: Close Export

Fiscal Year	Benefit Code	Benefit Name	Amount
2021	MI	Medicare	\$673.00
2021	NMB-ADMINA	Administrative Fee Empl +A	\$12.00
2021	NMB-BASICP	Basic Life/AD&D 75K Empl	\$82.00
2021	NMB-DELTA1	Delta Dental After Tax Empl	\$280.00
2021	NMB-LOVEA1	BCBS After-Tax (HMO) Empl	\$4,649.00
2021	NMB-VISNA1	EyeMed After Tax Empl	\$52.00
2021	OASDI	Social Security	\$2,877.00
2021	RETHC	PERA Retiree Health Care	\$928.00
2021	SPLAN3	State Plan 3	\$8,000.00
2021	XTRA1	Exempt Perm Positions P/T	\$178.00
2021	Total Benefits		\$17,731.00
2021	Total Salary		\$46,405.00
2021	Total		\$64,136.00

Records per page: 100 | Records: 13 - Page: 1

10.5. New Position Wizard

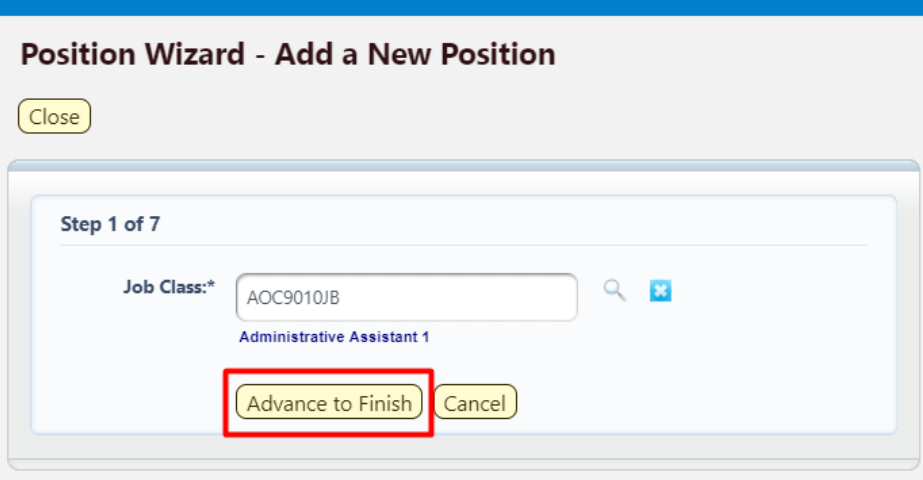
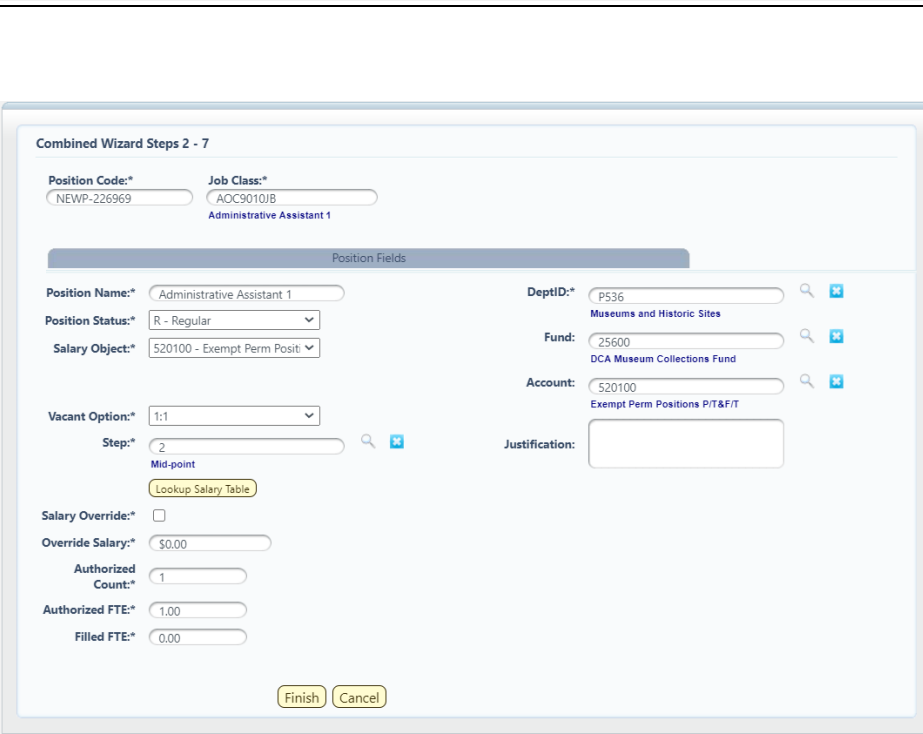

On the Position Tab click **New Positions** to open the New Position Wizard.

Form Positions

Page Actions: Close New Position Employee Changes

Enter search criteria here...

Follow each step to completion. If you click Cancel or Back in many cases the position will be cleared out and you will have to start over.

Position Tab	New Position Wizard
Step	Description
<p>Step 1</p> <ul style="list-style-type: none"> • Select the Job Class • Click Advance to Finish 	
<p>Step 2</p> <ul style="list-style-type: none"> • Ensure all fields designated with an asterisk (*) are completed. • If Salary Override is checked, then the amount in the Override Salary field will be used in the PCF calculations. • If requesting multiple positions for the same job class, change the Authorized Count to a different integer value, such as 5 • Enter desired Authorized FTE to the position being request. An FTE from 0 to 1 can be entered. • Filled FTE for a new position will be 0 	
<ul style="list-style-type: none"> • Note – The Lookup Salary Table button displays the salary amount of the chosen Step. 	

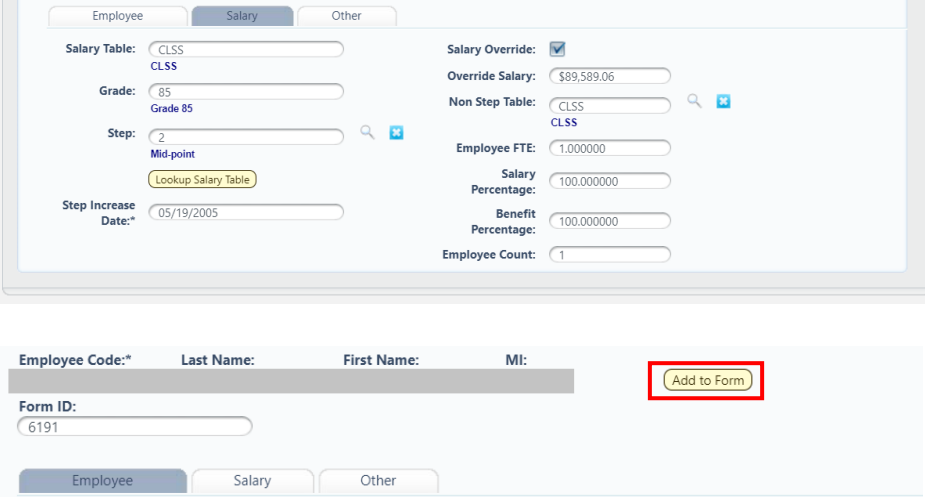
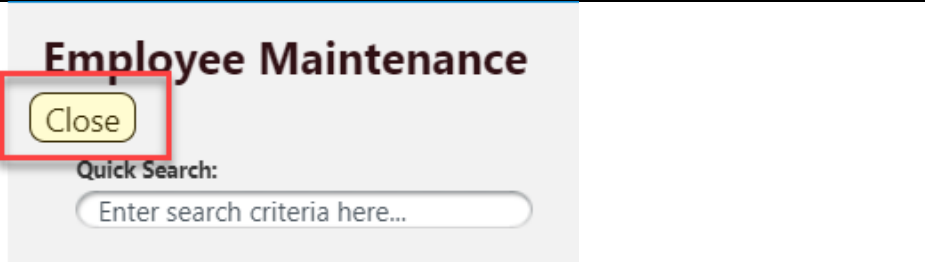

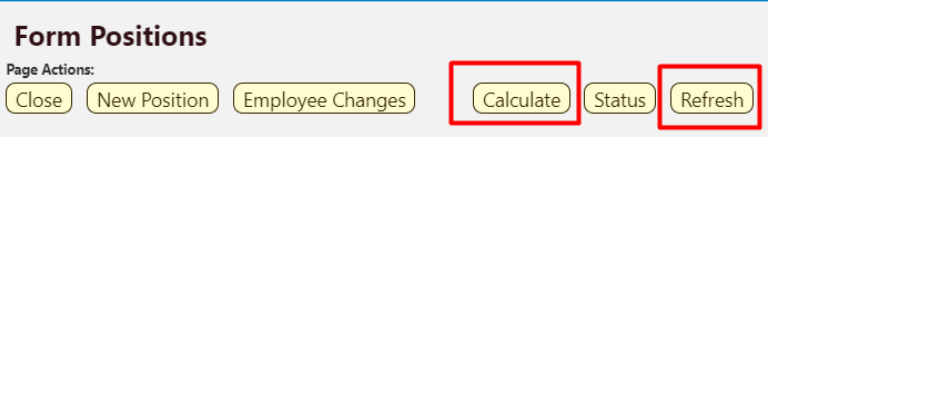
Position Tab	New Position Wizard												
<p>Step</p>	<p>Description</p> <div data-bbox="532 283 1425 972"> <h3>Salary Table Amounts</h3> <p>Close</p> <table border="1"> <thead> <tr> <th>Salary Table</th> <th>Grade Code</th> <th>Step</th> <th>Effective Start Date</th> <th>Effective End Date</th> <th>Salary</th> </tr> </thead> <tbody> <tr> <td>AOC</td> <td>FF</td> <td>2</td> <td>07/01/2020</td> <td>12/31/2100</td> <td>\$36,462.40</td> </tr> </tbody> </table> <p>Records per page: 25 Records: 1 - Page: 1</p>  </div>	Salary Table	Grade Code	Step	Effective Start Date	Effective End Date	Salary	AOC	FF	2	07/01/2020	12/31/2100	\$36,462.40
Salary Table	Grade Code	Step	Effective Start Date	Effective End Date	Salary								
AOC	FF	2	07/01/2020	12/31/2100	\$36,462.40								
<p>Step 4</p> <ul style="list-style-type: none"> Click Finish and the position is created and appears on the Position Tab of the form. Or click Cancel to delete the position request. 	<div data-bbox="532 1014 1425 1623"> <p>Combined Wizard Steps 2 - 7</p> <p>Position Code: NEWP-226969 Job Class: AOC9010JB Administrative Assistant 1</p> <p>Position Name: Administrative Assistant 1 DeptID: P536 Museums and Historic Sites</p> <p>Position Status: R - Regular Fund: 25600 DCA Museum Collections Fund</p> <p>Salary Object: 520100 - Exempt Perm Positi Account: 520100 Exempt Perm Positions P/T&F/T</p> <p>Vacant Option: 1:1 Step: 2 Mid-point Justification:</p> <p>Salary Override: <input type="checkbox"/> Override Salary: \$0.00</p> <p>Authorized Count: 1 Authorized FTE: 1.00 Filled FTE: 0.00</p> <p>Lookup Salary Table</p> <p>Finish Cancel</p> </div>												

10.6. Employee Changes

The Position Tab may also contain an Employee Changes Button. This button is used to add and make changes to existing employee. Potential changes may include but are not limited to funding allocations, salary and benefit modifications, FTP adjustments, position reclasses.



Position Tab	Employee Changes																																																																																																																																																																																
<p>Step 1</p> <ul style="list-style-type: none"> Select an Employee from the list. The list of employees is filtered based on the Agency on the form header. 	<p>Employee Maintenance</p> <p>Close</p> <p>Quick Search: <input type="text" value="Enter search criteria here..."/></p> <table border="1"> <thead> <tr> <th>Position</th> <th>Position Name</th> <th>Job Class</th> <th>Employee</th> <th>Name</th> <th>Union</th> <th>Home Orgn</th> <th>Employee FTE</th> <th>Employee Count</th> <th>Status</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>00004415</td> <td>A/O II</td> <td>CLSSX5000</td> <td></td> <td></td> <td>CN</td> <td>40010000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004436</td> <td>EXEC SECR; ADM ASST-A</td> <td>CLSSR6011</td> <td></td> <td></td> <td>CC</td> <td>44010050</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004437</td> <td>BUS OPS SPEC-A</td> <td>CLSSC1199</td> <td></td> <td></td> <td>NN</td> <td>40020000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004439</td> <td>CONSTRUCTION - PROJEC</td> <td>CLSSX3011</td> <td></td> <td></td> <td>NN</td> <td>40030000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004440</td> <td>PUB RELATION SPEC-A</td> <td>CLSSI9031</td> <td></td> <td></td> <td>CY</td> <td>40020000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004442</td> <td>MUSEUM TECH & CONSV-</td> <td>CLSSI4013</td> <td></td> <td></td> <td>CY</td> <td>44030050</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004446</td> <td>A/O II</td> <td>CLSSX5000</td> <td></td> <td></td> <td>CN</td> <td>43010000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004448</td> <td>ART DIRECTOR-B</td> <td>CLSSI1011</td> <td></td> <td></td> <td>NN</td> <td>40010000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004449</td> <td>CUST SRV REP-A</td> <td>CLSSR4051</td> <td></td> <td></td> <td>CY</td> <td>42010000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004450</td> <td>CUST SRV REP-B</td> <td>CLSSR4051</td> <td></td> <td></td> <td>CY</td> <td>43060000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004453</td> <td>ACCTNT & AUDITOR-O</td> <td>CLSSC2011</td> <td></td> <td></td> <td>CY</td> <td>42010000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004455</td> <td>OFFICE CLRK</td> <td>CLSSR9061</td> <td></td> <td></td> <td>NN</td> <td>40010000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004457</td> <td>CUST SRV REP-B</td> <td>CLSSR4051</td> <td></td> <td></td> <td>CY</td> <td>44020100</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004458</td> <td>SECURITY GUARD-O</td> <td>CLSSM903</td> <td></td> <td></td> <td>CY</td> <td>46050000</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> <tr> <td>00004459</td> <td>CUSTOMER SERVICE REP</td> <td>CLSSR4051</td> <td></td> <td></td> <td>NN</td> <td>44020100</td> <td>1.000000</td> <td>1</td> <td>Original</td> <td>Select</td> </tr> </tbody> </table> <p>Records per page: 50 Records: 371 Page: 1</p>	Position	Position Name	Job Class	Employee	Name	Union	Home Orgn	Employee FTE	Employee Count	Status	Actions	00004415	A/O II	CLSSX5000			CN	40010000	1.000000	1	Original	Select	00004436	EXEC SECR; ADM ASST-A	CLSSR6011			CC	44010050	1.000000	1	Original	Select	00004437	BUS OPS SPEC-A	CLSSC1199			NN	40020000	1.000000	1	Original	Select	00004439	CONSTRUCTION - PROJEC	CLSSX3011			NN	40030000	1.000000	1	Original	Select	00004440	PUB RELATION SPEC-A	CLSSI9031			CY	40020000	1.000000	1	Original	Select	00004442	MUSEUM TECH & CONSV-	CLSSI4013			CY	44030050	1.000000	1	Original	Select	00004446	A/O II	CLSSX5000			CN	43010000	1.000000	1	Original	Select	00004448	ART DIRECTOR-B	CLSSI1011			NN	40010000	1.000000	1	Original	Select	00004449	CUST SRV REP-A	CLSSR4051			CY	42010000	1.000000	1	Original	Select	00004450	CUST SRV REP-B	CLSSR4051			CY	43060000	1.000000	1	Original	Select	00004453	ACCTNT & AUDITOR-O	CLSSC2011			CY	42010000	1.000000	1	Original	Select	00004455	OFFICE CLRK	CLSSR9061			NN	40010000	1.000000	1	Original	Select	00004457	CUST SRV REP-B	CLSSR4051			CY	44020100	1.000000	1	Original	Select	00004458	SECURITY GUARD-O	CLSSM903			CY	46050000	1.000000	1	Original	Select	00004459	CUSTOMER SERVICE REP	CLSSR4051			NN	44020100	1.000000	1	Original	Select
Position	Position Name	Job Class	Employee	Name	Union	Home Orgn	Employee FTE	Employee Count	Status	Actions																																																																																																																																																																							
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00004448	ART DIRECTOR-B	CLSSI1011			NN	40010000	1.000000	1	Original	Select																																																																																																																																																																							
00004449	CUST SRV REP-A	CLSSR4051			CY	42010000	1.000000	1	Original	Select																																																																																																																																																																							
00004450	CUST SRV REP-B	CLSSR4051			CY	43060000	1.000000	1	Original	Select																																																																																																																																																																							
00004453	ACCTNT & AUDITOR-O	CLSSC2011			CY	42010000	1.000000	1	Original	Select																																																																																																																																																																							
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00004459	CUSTOMER SERVICE REP	CLSSR4051			NN	44020100	1.000000	1	Original	Select																																																																																																																																																																							
<p>Step 2</p> <ul style="list-style-type: none"> After an employee is selected, a new popup appears which contains the Employees data On the Employee Tab, the Job Class, Default Home Org, Employee Status, Position, Bargaining Unit, and Active and Vacant checkboxes can be modified. On the Salary Tab, Employee FTE, Salary Percentage, Benefit Percentage and Employee Count can be modified. 	<p>Employee Code:* Last Name: First Name: MI: Add to Form</p> <p>Form ID: <input type="text" value="6191"/></p> <p>Employee Salary Other</p> <p>Job Class:* <input type="text" value="CLSSX50000"/> A/O II Position:* <input type="text" value="00004415"/> A/O II</p> <p>Home Organization:* <input type="text" value="4001000000-50500"/> Museum Resources Administratio Bargaining Unit:* <input type="text" value="CN"/></p> <p>Employee Status:* <input type="text" value="R - R"/> Active: <input checked="" type="checkbox"/> Vacant: <input type="checkbox"/></p> <p>Justification: <input type="text"/></p>																																																																																																																																																																																

Position Tab	Employee Changes																																				
<p>Step</p> <ul style="list-style-type: none"> • If the Salary Override box is checked, then the Override Salary amount will be used in the PCF Calculations. If not, then the salary amount on the salary table will be used. • After completing the changes click Add to Form 	<p>Description</p> 																																				
<p>Step 3</p> <ul style="list-style-type: none"> • Click Close on the Employee Maintenance Screen and you will be redirected to the Position Tab 																																					
<p>Step 4</p> <ul style="list-style-type: none"> • The Position Tab will refresh will contain two positions. The negative position is a reversing entry to back out the existing position. The positive or form position contains the new position along with any adjustments made on the Salary and Employee tab. 	 <table border="1"> <thead> <tr> <th>Position Code</th> <th>Home Orgn</th> <th>Job Class</th> <th>Employee Code</th> <th>Name</th> <th>Count</th> <th>FTE</th> <th>Approval</th> <th>Salary</th> <th>Benefits</th> <th>Total</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>00004415</td> <td>4001000000-50</td> <td>CLSSX5000L</td> <td></td> <td></td> <td>-1</td> <td>-1.00</td> <td>True</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>Unapprove Results</td> </tr> <tr> <td>00004415</td> <td>3001010000-50</td> <td>CLSSX5000L</td> <td></td> <td></td> <td>1</td> <td>1.00</td> <td>True</td> <td>\$0.00</td> <td>\$0.00</td> <td>\$0.00</td> <td>Edits Unapprove Results</td> </tr> </tbody> </table>	Position Code	Home Orgn	Job Class	Employee Code	Name	Count	FTE	Approval	Salary	Benefits	Total	Actions	00004415	4001000000-50	CLSSX5000L			-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results	00004415	3001010000-50	CLSSX5000L			1	1.00	True	\$0.00	\$0.00	\$0.00	Edits Unapprove Results
Position Code	Home Orgn	Job Class	Employee Code	Name	Count	FTE	Approval	Salary	Benefits	Total	Actions																										
00004415	4001000000-50	CLSSX5000L			-1	-1.00	True	\$0.00	\$0.00	\$0.00	Unapprove Results																										
00004415	3001010000-50	CLSSX5000L			1	1.00	True	\$0.00	\$0.00	\$0.00	Edits Unapprove Results																										
<p>Step 5</p> <ul style="list-style-type: none"> • In order to view the results, click the Calculate button. The results may take up a minute to be displayed and the Refresh button can be used to check if the results are ready. • Only click the Calculate button once. Clicking Calculate multiple times may delay the process and the results. 	<p>Form Positions</p> <p>Page Actions:</p> 																																				

Position Tab	Employee Changes																					
Step	Description																					
<p>Step 6</p> <ul style="list-style-type: none"> When the projection is completed, the results will be displayed in the Position Tab grid. Unapprove – There is no Delete button, so this is used to cancel a change made to a position Results – This button will display a breakdown of the PCF results by Salary amount, benefit type, and benefit amount. Edit – This button directs the user to the Salary and Employee tabs where additional changes can be made. 	<table border="1"> <thead> <tr> <th>Count</th> <th>FTP</th> <th>Approval</th> <th>Salary</th> <th>Benefits</th> <th>Total</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>-1</td> <td>-1.00</td> <td>True</td> <td>(\$72,425.60)</td> <td>(\$40,504.33)</td> <td>(\$112,929.93)</td> <td>Unapprove Results</td> </tr> <tr> <td>1</td> <td>1.00</td> <td>True</td> <td>\$57,940.48</td> <td>\$32,403.47</td> <td>\$90,343.95</td> <td>Edit Unapprove Results</td> </tr> </tbody> </table>	Count	FTP	Approval	Salary	Benefits	Total	Actions	-1	-1.00	True	(\$72,425.60)	(\$40,504.33)	(\$112,929.93)	Unapprove Results	1	1.00	True	\$57,940.48	\$32,403.47	\$90,343.95	Edit Unapprove Results
Count	FTP	Approval	Salary	Benefits	Total	Actions																
-1	-1.00	True	(\$72,425.60)	(\$40,504.33)	(\$112,929.93)	Unapprove Results																
1	1.00	True	\$57,940.48	\$32,403.47	\$90,343.95	Edit Unapprove Results																

10.7. Detail or Request Tab

The Detail Tab, also labeled Request, shows the detailed costs of the Expansion Request.

Budget Form Lines

Close Export Import Refresh

ID	Form	PCode-R	Form Name	GF Sources	OSF Sources	ISF/IAT Sources	FF Sources	Total Expenses	Total Revenue	Net
5653	3200	P681-R - State Racing Commission	Expansion Request (3200)	\$477,500	\$0	\$229,000	\$20,400	\$363,500	\$363,400	\$100

Quick Search: Enter search criteria here...

Actions: Add New Copy Screen Configuration Action Configuration Validation Configuration

Row	Audit Trail	Department	Fund	Account Type	Account	Account Name	2020-2021 PCF Projection	2020-21 GF Sources*	2020-21 OSF Sources*	2020-21 ISF/IAT Sources*	2020-21 FF Sources*	2020-21 Total Request	Comments / Notes*
1		0100000000-46900	19200	Other Revenues	425902	Other Services	0	171,200	0	0	0	171,200	
2		0100000000-46900	19200	Other Revenues	433902	Other	0	0	0	192,200	0	192,200	
3		0100000000-46900	19200	Personal Services B.	520100	Exempt Perm Positions P/T&F/	98,731	191,900	0	0	0	191,900	
4		0100000000-46900	19200	Personal Services B.	521100	Group Insurance Premium	10,148	0	0	0	20,400	20,400	
5		0100000000-46900	19200	Personal Services B.	521200	Retirement Contributions	18,923	0	0	36,800	0	36,800	
6		0100000000-46900	19200	Personal Services B.	521300	F I C A	7,524	14,400	0	0	0	14,400	
7		0100000000-46900	19200	Other	540000	Other Expenses	0	100,000	0	0	0	100,000	

Records per page: 50

Records: 1 - 7 of 7 - Pages: 1/1

The top table shows a read-only summary of the Expansion Request. The columns are described below.

Screen:	Expansion Request 3200 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
PCode	Read Only. PCode and Program Name
Form Name	Read Only. Form Name

Screen:	Expansion Request 3200 Budget Form Lines
Field (Column Name)	Description
GF Sources	Read Only. Total Request of General Fund
OSF Sources	Read Only. Total Request of Other State Funds
ISF/IAT Sources	Read Only. Total Request of Internal Services Fund or Inter Agency Transfers
FF Sources	Read Only. Total Request of Federal Funding
Total Expenses	Read Only. Total Expenses entered in request form
Total Revenue	Read Only. Total Revenues entered in request form
Net	Read Only. Difference between Total Expenses and Total Revenue columns. Must equal zero.

The second table contains the Expansion Request budget data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the Expansion Request 3200 Form.

Row	Audit Trail	Department	Fund	Account Type	Account	Account Name	2020-2021 PCF Projection	2020-21 GF Sources*	2020-21 OSF Sources*	2020-21 ISF/IAT Sources*	2020-21 FF Sources*	2020-21 Total Request	Comments / Notes*
1		0100000000-46900	19200	Other Revenues	425902	Other Services	0	171,200	0	0	0	171,200	
2		0100000000-46900	19200	Other Revenues	433902	Other	0	0	0	192,200	0	192,200	
3		0100000000-46900	19200	Personal Services &	520100	Exempt Perm Positions	98,731	191,900	0	0	0	191,900	
4		0100000000-46900	19200	Personal Services &	521100	Group Insurance Premi	10,148	0	0	0	20,400	20,400	
5		0100000000-46900	19200	Personal Services &	521200	Retirement Contributor	18,923	0	0	36,800	0	36,800	
6		0100000000-46900	19200	Personal Services &	521300	F I C A	7,524	14,400	0	0	0	14,400	
7		0100000000-46900	19200	Other	540000	Other Expenses	0	100,000	0	0	0	100,000	

Screen:	Expansion Request 3200 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
Department	Read Only. Contains PCode Number.
Department Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Fund	Read Only. Budget line for Fund
Fund Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Cat	Read Only. Budget line for Category code
Account	Read Only. Budget line for Account
Account Name	Read Only. Budget line for Account Name
20XX-XX PCF Projection	Read Only. Budget line for requests made on Position Tab
20XX-XX GF Sources*	Data Entry Column. Enter General Fund request
20XX-XX OSF Sources*	Data Entry Column. Enter Other State Funds request
20XX-XX ISF/IAT Sources*	Data Entry Column. Enter Internal Service Funds / Interagency Transfer request
20XX-XX FF Sources*	Data Entry Column. Enter Federal Funds request

Screen:	Expansion Request 3200 Budget Form Lines
Field (Column Name)	Description
20XX-XX Total Request	Read Only. Sum of data entry requests columns.
Comments/Notes*	Entry Column. Enter text justification
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

10.7.1. Enter data into the Expansion Request form following the instructions from Section 8.4 [Excel Export/Import](#) or Section 8.11 [Add New Budget Entry](#).

Note: PCF Projections will be calculated to the dollar, but the system will apply natural rounding to the nearest hundred dollars for budget requests.

Department	Fund	Account Type	Account	Account Name	2020-2021 PCF Projection	2020-21 GF Sources*	2020-21 OSF Sources*	2020-21 ISF/IAT Sources*	2020-21 FF Sources*	2020-21 Total Request	Comm
0100000000-46900	19200	Other Revenues	425902	Other Services	0	171,200	0	0	0	171,200	
0100000000-46900	19200	Other Revenues	433902	Other	0	0	0	192,200	0	192,200	
0100000000-46900	19200	Personal Services &	520100	Exempt Perm Positions	98,731	191,900	0	0	0	191,900	
0100000000-46900	19200	Personal Services &	521100	Group Insurance Premi	10,148	0	0	0	20,400	20,400	
0100000000-46900	19200	Personal Services &	521200	Retirement Contributi	18,923	0	0	36,800	0	36,800	
0100000000-46900	19200	Personal Services &	521300	F I C A	7,524	14,400	0	0	0	14,400	
0100000000-46900	19200	Other	540000	Other Expenses	0	100,000	0	0	0	100,000	

Request must include expenses and revenues which must balance. The top table will show the **Total Expenses** and **Total Revenues** as the form is updated. The **Net** column will display the difference between the Total Expenses and Total Revenues and should equal zero.

Budget Form Lines

Close Export Import Refresh

ID	Form	PCode-R	Form Name	GF Sources	OSF Sources	ISF/IAT Sources	FF Sources	Total Expenses	Total Revenue	Net
5653	3200	P681-R - State Racing Commission	Expansion Request (3200)	\$477,600	\$0	\$229,000	\$20,400	\$363,500	\$363,500	\$0

Quick Search:
Enter search criteria here...

Actions:
Add New Copy Screen Configuration Action Configuration Validation Configuration

Row	Audit Trail	Department	Fund	Account Type	Account	Account Name	2020-2021 PCF Projection	2020-21 GF Sources*	2020-21 OSF Sources*	2020-21 ISF/IAT Sources*	2020-21 FF Sources*	2020-21 Total Request	Comments / Notes*
1		0100000000-46900	19200	Other Revenues	425902	Other Services	0	171,300	0	0	0	171,300	
2		0100000000-46900	19200	Other Revenues	433902	Other	0	0	0	192,200	0	192,200	
3		0100000000-46900	19200	Personal Services &	520100	Exempt Perm Positions P/T&F	98,731	191,900	0	0	0	191,900	
4		0100000000-46900	19200	Personal Services &	521100	Group Insurance Premium	10,148	0	0	0	20,400	20,400	
5		0100000000-46900	19200	Personal Services &	521200	Retirement Contributions	18,923	0	0	36,800	0	36,800	
6		0100000000-46900	19200	Personal Services &	521300	F I C A	7,524	14,400	0	0	0	14,400	
7		0100000000-46900	19200	Other	540000	Other Expenses	0	100,000	0	0	0	100,000	

10.8. Explanation Tab

The Explanation Tab consists of fields to provide detailed narrative on the budget form.

10.8.1. Navigate to the **Header** tab, then locate and click **Explanation** to open.

10.8.2. Enter justification text in the appropriate fields. Click **Save** to update the form.

Header Request Position Tab **Explanation** Analyst's Comments Attachments

Save

Problem being addressed:
Requested expansion FTE and services are necessary to address the deinstitutionalization of NM's children and youth through the use of trauma-responsive social and emotional therapies and supports and supporting community-based service development. Expansion efforts are necessary to meet the community behavioral health

Performance Improvements:
FTE expansion will support the development of behavioral health quality improvement supports, tracking and analysis of outcomes further supports CYFD BHS' ability to ensure high quality programming that is effective and positively impacts the behavioral needs of children, youth and their families. Specifically, BHS will

Consequences of not funding:
New Mexico's children's behavioral health system will continue to experience disruptions and gaps in the service continuum. Children and youth experiencing complex trauma, multi-system involvement, and high behavioral health needs will experience placement disruptions, placement in higher levels of care to include in-state and

Assumptions and Methodology:
Requested increases are based upon projected numbers served by each program initiative. CYFD BHS received quarterly reports from each of the three Managed Care Organizations (MCOs) on the number of New Mexico children and youth in out-of-home behavioral health placements. CYFD BHS analyzes these reports and

Performance Measure
The following Performance Measure has been proposed to the LFC for SFY21: "Percent of youth receiving services who are able to be maintained in the least restrictive setting"

10.9. Analyst Comments Tab

The form includes an Analyst Comments Tab for Budget Analysts to make remarks on the Expansion Request.

10.9.1. Navigate to the **Header** tab, then locate and click **Analyst Comments** to open.

10.9.2. Enter text into the field, as needed, and click **Save** to update the form.

Header Request Position Tab Explanation **Analyst's Comments** Attachments

Analyst Comments:
description 7

Save

10.10. Attachments Tab

Attachments can be added to the form following the instructions outlined in Section 8.13 [Attachments Tab](#).

10.11. Submit Expansion Request

Once the Expansion Request form is complete. Submit the form following the instructions in Section 8.14 [Submit Budget Form](#).

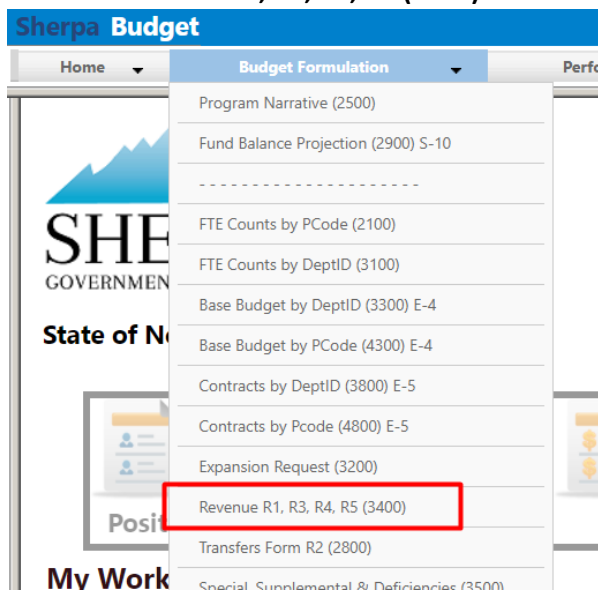
10.12. Report

10.12.1. Data from the Expansion Request 3200 form can be viewed in the Expansion Request EB-1, EB-2, EB-3 Reports. See Section 21 [BFM Reporting](#) for instructions on how to access reports.

11. Revenue R-1, R-3, R-4, R-5

The legacy Revenue forms R-1, R-3, R-4, and R-5 are combined into a single Revenue Form 3400 in BFM.

11.1.1. Navigate to the Revenue form by hovering over the **Budget Formulation** menu and clicking **Revenue R1, R3, R4, R5 (3400)**.



11.1.2. Select an available form from the main Revenue form screen or "List Page." This page will return a form for each agency or program based on your security. If there are no agencies or programs assigned for your security role, this list will be blank. If you believe there is an error in the list of agencies or programs available in your list, then contact the BFM Administrator to update your security role.

11.1.3. To edit the form, click **Detail**. The Header tab contains some general information about the form, but data will be entered on the Detail screen.

Revenue R1, R3, R4, R5 (3400)

Quick Search: [Show Advanced Filters](#)

Record Actions:

Form ID	Description	Stage	Agency	Form Rows	Last Update	Last User	Submit	Actions
5253	11400 - Senate Chief Clerk	3401	11400	0	9/21/2020	u1	Submit	Header Detail
5335	50500 - Cultural Affairs Department	3401	50500	51	2/15/2021	chuck.hulem@:	Submit	Header Detail

Records per page: Records: 2 - Page: 1

The Revenue form will load.

Budget Form Lines

[Close](#) [Export](#) [Import](#) [Refresh](#)

ID	Form	Agency	Form Name	Total Revenue
5335	3400	50500 - Cultural Affairs Department	Revenue R1, R3, R4, R5 (3400)	\$41,156,300

Quick Search:

Actions: [Add New](#) [Copy](#)

Row	Audit Trail	PCode	Fund	Revenue Type	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2020-21 Base Budget Requests*	Justification*	
20		P536	19300	General Fund Transfers	499105	General Fd. Appropriation	20,572,200	\$21,858,700	21,858,700	flat budget	
40		P537	19300	General Fund Transfers	499105	General Fd. Appropriation	1,402,600	\$707,300	707,400		
60		P761	19300	General Fund Transfers	499105	General Fd. Appropriation	1,321,900	\$1,332,300	1,332,300	flat budget	
55		P540	19300	General Fund Transfers	499105	General Fd. Appropriation	3,370,500	\$4,122,000	4,000,000	need to reduce program support budget	
50		P539	19300	General Fund Transfers	499105	General Fd. Appropriation	3,073,200	\$3,642,600	3,700,000	increase for more library grants	
17		P536	19300	Federal Revenues	451904	Federal Direct - Capital	82,571	\$0	0		
39		P537	19300	Federal Revenues	451904	Federal Direct - Capital	122,922	\$0	0		
44		P539	19300	Other Revenues	422902	Other Fees	100	\$0	0		
33		P537	19300	Other Revenues	422902	Other Fees	190,127	\$341,900	341,900		
42		P537	53000	Other Revenues	422902	Other Fees	208,613	\$0	0		
2		P536	19300	Other Revenues	422902	Other Fees	49,856	\$64,000	64,000	test	
45		P539	19300	Other Revenues	424302	Printing & Reproduction	736	\$0	0		
3		P536	19300	Other Revenues	424302	Printing & Reproduction	31,833	\$28,800	28,800	2nd test	
4		P536	19300	Other Revenues	424502	Use Of Property	0	\$0	0		
34		P537	19300	Other Revenues	424902	Other Intra State Services	17,068	\$11,500	11,500		

Records per page: Records: 1 - 50 of 61 - Pages: 1

The top table shows a read-only summary of the budget revenue request. The columns are described below.

Budget Form Lines

[Close](#) [Export](#) [Import](#) [Refresh](#)

ID	Form	Agency	Form Name	Total Revenue
5335	3400	50500 - Cultural Affairs Department	Revenue R1, R3, R4, R5 (3400)	\$41,156,300

Screen:	Revenue R1, R3, R4, R5 3400 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Form Name	Read Only. Form Name
Total Revenue	Read Only. Total revenue entered into form

The second table contains the budget revenue data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the Revenue R1, R3, R4, R5 3400 Form.

Row	Audit Trail	PCode	Fund	Revenue Type	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2020-21 Base Budget Requests*	Justification*	
20		P536	19300	General Fund Transfers	499105	General Fd. Appropriation	20,572,200	\$21,858,700	21,858,700	flat budget	
40		P537	19300	General Fund Transfers	499105	General Fd. Appropriation	1,402,600	\$707,300	707,400		
60		P761	19300	General Fund Transfers	499105	General Fd. Appropriation	1,321,900	\$1,332,300	1,332,300	flat budget	
55		P540	19300	General Fund Transfers	499105	General Fd. Appropriation	3,370,500	\$4,122,000	4,000,000	need to reduce program support budget	
50		P539	19300	General Fund Transfers	499105	General Fd. Appropriation	3,073,200	\$3,642,600	3,700,000	increase for more library grants	

Screen:	Revenue R1, R3, R4, R5 3400 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
PCode	Read Only. Contains PCode Number.
PCode Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Fund	Read Only. Budget line for Fund
Fund Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Revenue Type	Read Only. Budget line for Revenue Type, will populate based on Account
Account	Read Only. Budget line for Account
Account Name	Read Only. Budget line for Account Name
20XX-XX Actuals	Read Only. Budget line for previous year Actuals data from SHARE
20XX-XX Adopted Budget	Read Only. Budget line for current year Adopted Budget data from SHARE
20XX-XX Base Budget Requests *	Data Entry Column. Enter base budget revenue request
Justification*	Entry Column. Enter text justification
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

11.1.4. Edit an existing budget line or click **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#)

and Section 8.11 [Add New Budget Entry](#).

- Enter the **PCode**; click the Magnifying Glass to select from a filtered list of PCodes based on your security
- Enter the **Fund** code; click the Magnifying Glass to see a list of all funds
- Enter the **Account** number; click the Magnifying Glass to select from a list filtered to Revenue and Equity accounts. The Revenue Type column will be automatically populated in the form based on the selected Account
- Enter the **Justification**
- Enter the **Base Budget Request**

Budget Form Entry - Add New Line

Page Actions: Close

Form ID	Form Definition
5335	3400

PCode

🔍
✖

Preservation

Fund

🔍
✖

Not Used

Account

🔍
✖

Other Fees

Save

Cancel

Justification:

example new revenue request

2020-21 Base Budget Requests*:

Audit Text:

Click **Save**. The new revenue request will appear in the form.

Budget Form Lines

ID	Form	Agency	Form Name	Total Revenue
5335	3400	50500 - Cultural Affairs Department	Revenue R1, R3, R4, R5 (340)	\$41,171,300

Quick Search:

Actions:

Row	Audit Trail	PCode	Fund	Revenue Type	Account	Account Name	2018-19 Actuals	2019-20 Adopted Budget	2020-21 Base Budget Requests*	Justification*	
20		P536	19300	General Fund Transfers	499105	General Fd. Appropriation	20,572,200	\$21,858,700	21,858,700	flat budget	
56		P540	19300	General Fund Transfers	499105	General Fd. Appropriation	3,370,500	\$4,122,000	4,000,000	need to reduce program support budget	
51		P539	19300	General Fund Transfers	499105	General Fd. Appropriation	3,073,200	\$3,642,600	3,700,000	increase for more library grants	
41		P537	19300	General Fund Transfers	499105	General Fd. Appropriation	1,402,600	\$707,300	707,400		
61		P761	19300	General Fund Transfers	499105	General Fd. Appropriation	1,321,900	\$1,332,300	1,332,300	flat budget	
17		P536	19300	Federal Revenues	451904	Federal Direct - Capital	82,571	\$0	0		
40		P537	19300	Federal Revenues	451904	Federal Direct - Capital	122,922	\$0	0		
43		P537	53000	Other Revenues	422902	Other Fees	208,613	\$0	0		
33		P537	00000	Other Revenues	422902	Other Fees	0	\$0	15,000	example new revenue request	
45		P539	19300	Other Revenues	422902	Other Fees	100	\$0	0		

11.1.5. Once all revenue requests have been added to the form, submit the Revenue form following instructions from 8.14 [Submit Budget Form](#).

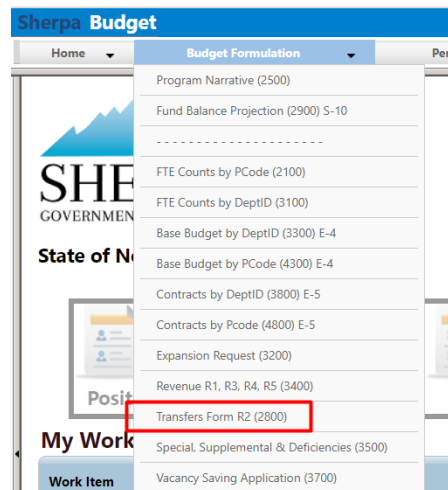
11.2. Report

11.2.1. Data from the Revenue R-1, R-3, R-4, R-5 2800 form can be viewed in the S-8 Financial Summary and S-9 Account Code Summary. See Section 21 [BFM Reporting](#) for instructions on how to access reports.

12. Transfers R-2

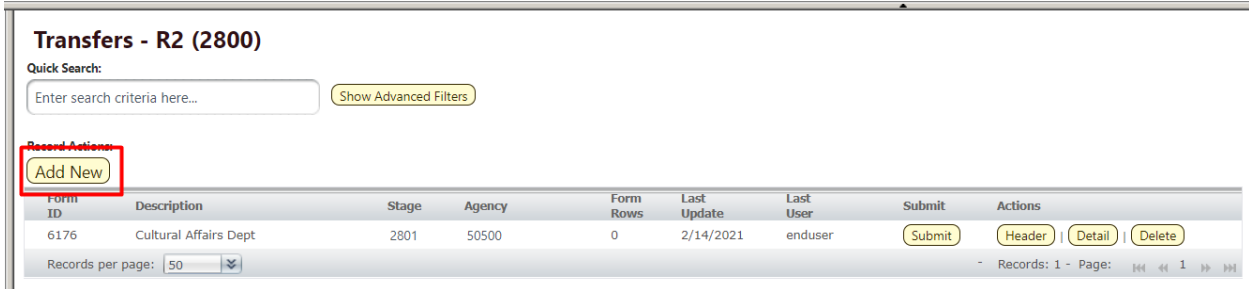
Non-General Fund transfers are entered into the Transfers Form R-2, numbered 3400 in BFM>

12.1.1. Navigate to the Revenue form by hovering over the **Budget Formulation** menu and clicking **Transfers Form R2 (3400)**.



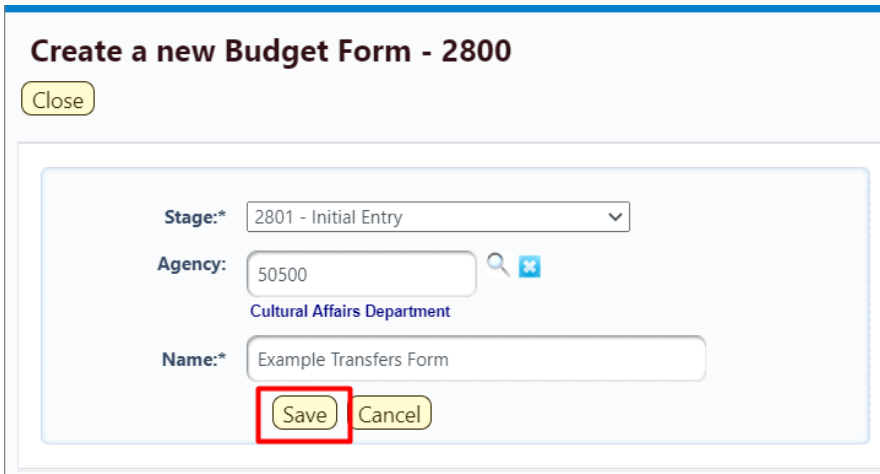
12.2. Add New Transfers Form

12.2.1. Click Add New on the Transfers main screen, or “List Page”.



12.2.2. Select **Stage** 2801 – Initial Entry. Enter **Agency** code or use the Magnifying Glass to select from a filtered list based on user security. Enter **Name** for the proposed Transfer.

12.2.3. Click **Save**.



12.2.4. The Transfers form Header tab will open. Click the **Transfers** tab to navigate to the Details or data entry tab.

Budget Form Header

Instance ID	Form Definition	Definition Name	Name	Agency:
6193	2800	Transfers - R2 (2800)	Example Transfers Form	50500

Stage Code:*
Agency:
Initial Entry Cultural Affairs Department

Name:

Notes:

12.2.5. The Transfers form will load. The form will be blank for a new form.

Budget Form Lines

ID	Form	Agency	Form Name	Total Actual	Total Adopted	Total Proposed
6193	2800	50500 - Cultural Affairs Department	Transfers - R2 (2800)			

Quick Search:

Actions:

Row	Audit Trail	Providing Dept	Providing Fund	Providing Account	Providing Account No	Receiving Dept	Receiving Fund	Receiving Acco	Receiving Account No	2018-19 Actual Transfers*	2019-20 Adopted Budget Transfer*	2020-21 Proposed Budget Transfer*	Justification*
There are no records available.													

Records per page: | Records: 0 - 0 of 0 - Pages: | |

The top table shows a read-only summary of the proposed Transfers. The screenshot below shows an example form that is populated. The columns are described below.

ID	Form	Agency	Form Name	Total Actual	Total Adopted	Total Proposed
5381	2800	21600 - Supreme Court	Transfers - R2 (2800)	\$500,000	\$600,000	\$1,700,000

Screen:	Transfers R-2 2800 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Form Name	Read Only. Form Name
Total Actual	Read Only. Total Actual Transfers for previous fiscal year entered on form
Total Adopted	Read Only. Total Adopted Budget Transfers for current fiscal year entered on form
Total Proposed	Read Only. Total Proposed Transfers entered on form

The second table contains the proposed transfer budget data. Again, the example screenshot below shows a form populated with data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the Transfers R-2 form.

Row	Audit Trail	Providing Dept	Providing Fund	Providing Account	Providing Account Name	Receiving Dept	Receiving Func	Receiving Account	Receiving Account N	2018-19 Actual Transfers*	2019-20 Adopted Budget Transfer*	2020-21 Proposed Budget Transfers*	Justification*
1		P216	04800	535310	Other Services - Higher Ed	P259	04800	425910	Other Services - CU	\$0	\$0	\$1,000,000	
2		P216	04800	547450	Grants to Other Agencies	P259	04800	425910	Other Services - CU	\$500,000	\$600,000	\$700,000	grant for courts

Records per page: 50 | Records: 1 - 2 of 2 - Pages: 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | 17 | 18 | 19 | 20 | 21 | 22 | 23 | 24 | 25 | 26 | 27 | 28 | 29 | 30 | 31 | 32 | 33 | 34 | 35 | 36 | 37 | 38 | 39 | 40 | 41 | 42 | 43 | 44 | 45 | 46 | 47 | 48 | 49 | 50

Screen:	Transfers R-2 2800 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
Providing Dept	Read Only. PCode Number of the Department providing the transfer
Providing Fund	Read Only. Fund providing the transfer
Providing Account	Read Only. Account providing the transfer
Providing Account Name	Read Only. Name of account providing the transfer
Receiving Dept	Read Only. PCode Number of the Department receiving the transfer
Receiving Fund	Read Only. Fund receiving the transfer
Receiving Account	Read Only. Account receiving the transfer
Receiving Account Name	Read Only. Name of account receiving the transfer
20XX-XX Actual Transfers*	Data Entry Column. Enter previous fiscal year's Actual Transfers amount.
20XX-XX Adopted Budget Transfer*	Data Entry Column. Enter current fiscal year's Adopted Budget Transfer amounts
20XX-XX Proposed Budget Transfers*	Data Entry Column. Enter Proposed Budget Transfers amounts
Justification*	Entry Column. Enter text justification
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

12.2.6. Click **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#) and Section 8.11 [Add New Budget Entry](#).

- Enter the **Providing PCode**; click the Magnifying Glass to select from a filtered list of PCodes based on the Agency selected during form creation
- Enter the **Providing Fund** code; click the Magnifying Glass to see a list of all funds

- Enter the **Providing Account**; click the Magnifying Glass to select from a list filtered to available Accounts for transfers
- Enter the **Receiving PCode**; click the Magnifying Glass to select from list of PCodes
- Enter the **Receiving Fund** code; click the Magnifying Glass to see a list of all funds
- Enter the **Receiving Account**; click the Magnifying Glass to select from a list filtered to available Accounts for transfers
- Enter the Justification
- Enter the Base Budget Request
- Enter previous fiscal year's **Actual Transfers**
- Enter current fiscal year's **Adopted Budgeted Transfers**
- Enter **Proposed Budget Transfers**

Budget Form Entry - Add New Line

Page Actions: Close

Form ID	Form Definition
6193	2800

Providing PCode
P536 🔍 +

Museums and Hi

Receiving PCode
P001 🔍 +

Administration

Providing Fund
00300 🔍 +

Contribution Fun

Receiving Fund
00304 🔍 +

Contribution Fun

Providing Account
535309 🔍 +

Other Services - I

Receiving Account
499905 🔍 +

Other Financing

Save Cancel

Justification:

2018-19 Actual Transfers*:

2019-20 Adopted Budget Transfer*:

2020-21 Proposed Budget Transfer*:

Audit Text:

Audit Text:

Audit Text:

Click **Save**. The new revenue request will appear in the form.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name	Total Actual	Total Adopted	Total Proposed
6193	2800	50500 - Cultural Affairs Department	Transfers - R2 (2800)	\$15,000	\$14,900	\$15,000

Quick Search:

Actions: Add New Copy

Row	Audit Trail	Providing Dept	Providing Fund	Providing Account	Providing Account Na	Receiving Dept	Receiving Fund	Receiving Acco	Receiving Account Na	2018-19 Actual Transfers*	2019-20 Adopted Budget Transfer*	2020-21 Proposed Budget Transfer*	Justification*
1		P536	00300	535309	Other Services - Interaget	P001	00304	499905	Other Financing Sources	\$15,000	\$14,900	\$15,000	Example text here

Records per page:

Records: 1 - 1 of 1 - Pages: ⏪ ⏩ 1 ⏹

12.2.7. Once all transfers have been added to the form, submit the Transfers form following instructions from 8.14 [Submit Budget Form](#).

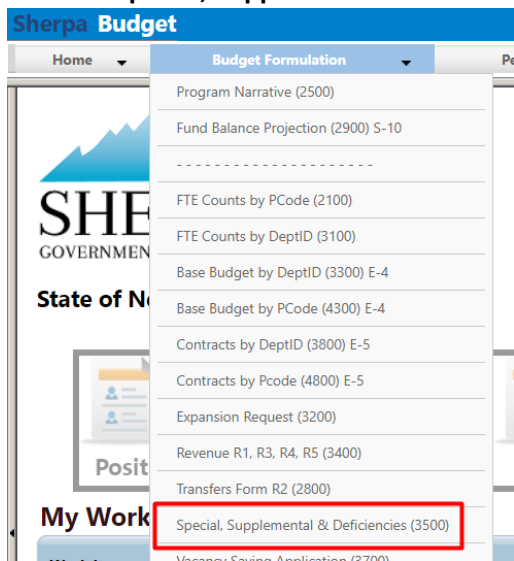
12.3. Reports

12.3.1. Data from the Transfers R-2 Form 2800 form can be viewed in the S-8 Financial Summary and S-9 Account Code Summary. See Section 21 [BFM Reporting](#) for instructions on how to access reports.

13. Special, Supplemental & Deficiencies

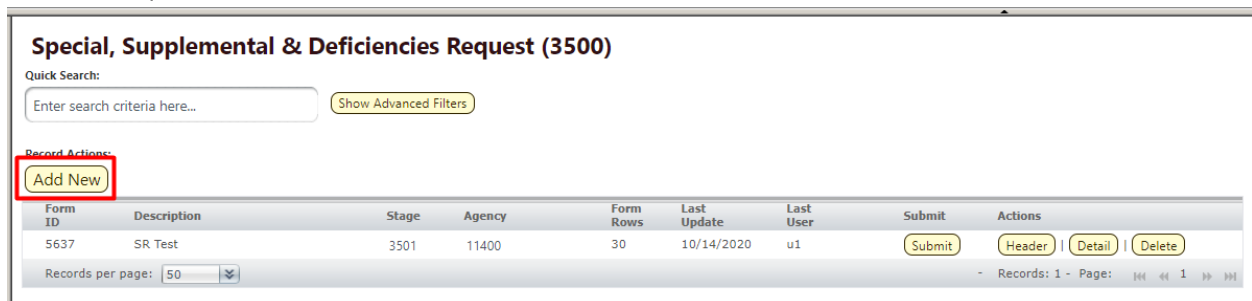
Special nonrecurring, deficiency and supplemental appropriation requests are captured in the Special, Supplemental & Deficiencies form 3500. Requests in this form is intended for nonrecurring appropriations to meet specific identified needs. **Prepare a separate form for each request.**

13.1.1. Navigate to the Specials form by hovering over the **Budget Formulation** menu and clicking **Special, Supplemental & Deficiencies (3500)**.



13.2. Add New

13.2.1. Click **Add New** on the form main screen or “List Page.” Note: prepare a separate form for each request.



13.2.2. Select **Stage** 3501 – Initial Entry. Enter **Agency** code or use the Magnifying Glass to select from

a filtered list based on user security. Enter **Name** for the request.

13.2.3. Click **Save**.

Create a new Budget Form - 3500

[Close](#)

Stage*: 3501 - Initial Entry

Agency: 50500
Cultural Affairs Department

Name*: Supplemental Request

[Save](#) [Cancel](#)

13.3. Header Tab

13.3.1. The form Header tab will open. Complete the fields and click **Save** before navigating to another tab.

Budget Form Header

[Comment History](#) [Comment](#) [Submit](#) [Close](#)

Instance ID	Form Definition	Definition Name	Name	Agency
6194	3500	Special, Supplemental & Deficiencies Request (3500)	Supplemental Request	50500

Stage Code*: 3501
Initial Entry

P-Code: 50500
Cultural Affairs Department

[Header](#) [Request](#) [Explanation](#) [Attachments](#)

Expansion Name: Supplemental Request [Save](#)

Request Type: [Dropdown]

Rank: 0

Related to recurring expense:

Related to capital request:

Related to proposed legislation:

Agency Contact: [Text Box]

Contact Phone: [Text Box]

Brief description of the request: [Text Area]

Language requested for inclusion in General Appropriations Act: [Text Area]

Justification (Attach): [Text Area]

13.4. Request (Details) Tab

13.4.1. From the Header tab, click the **Request** tab.

13.4.2. The budget data entry form will load. When a new form is created, it will be blank as shown below.

ID	Form	Agency	Form Name	Total FTE	Total Expenses	Total Revenue
6202	3500	50500 - Cultural Affairs Department	Special, Supplemental & Def	0.00	\$0	\$0

The top table shows a read-only summary of the form. The screenshot below shows an example form that is populated. The columns are described below.

ID	Form	Agency	Form Name	Total FTE	Total Expenses	Total Revenue
5637	3500	11400 - Senate Chief Clerk	Special, Supplemental & Def	13.00	\$45,000	\$0

Screen:	Special, Supplemental & Deficiencies (3500) Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Form Name	Read Only. Form Name
Total FTE	Read Only. Total Full Time Equivalent requested in form
Total Expenses	Read Only. Total Expenses requested in form
Total Revenue	Read Only. Total Revenue entered in form

The second table contains the Special, Supplemental & Deficiencies request data. Again, the example screenshot below shows a form populated with data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the form.

Row	Audit Trail	PCode	Account	Account Name	FTE Request*	Request*	Comments / Notes
1		P114	200	Personal Services & Employee	0.00	\$30,000	import
2		P114	400	Other	0.00	\$15,000	
3		P114	FTE-PM	Permanent	2.00	\$0	import
4		P114	FTE-TM	Term	0.00	\$0	import
5		P114	FTE-TP	Temporary	11.00	\$0	import

Screen:	Special, Supplemental & Deficiencies (3500) Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
PCode	Read Only. Contains PCode Number.
PCode Name	Read Only. <i>This column is minimized, use double arrows to expand.</i>
Account	Read Only. Budget line for Account
Account Name	Read Only. Budget line for Account Name
FTE Request*	Data Entry Column. Enter number of Full Time Equivalent requested
Request*	Data Entry Column. Enter Requested amount
Comments / Notes *	Data Entry Column. Enter Comments or Notes related to budget line
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

13.4.3. Click **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#) and Section 8.11 [Add New Budget Entry](#).

- Enter the **PCode**; click the Magnifying Glass to select from a filtered list of PCodes based on the Agency selected during form creation
- Enter the **Comments / Notes**, if needed
- Enter amount in **FTE Request**
- Enter **Request** amount

Budget Form Entry - Add New Line

Page Actions: [Close](#)

Form ID	Form Definition
6194	3500

PCode: [P](#) [+](#) Account: [A](#) [+](#) [Save](#) [Cancel](#)
Library Services General Fund Transfr

Comments / Notes:

FTE Request: Audit Text:
 Request: Audit Text:

Click **Save**. The new request will appear in the form.

Budget Form Lines

[Close](#) [Export](#) [Import](#) [Refresh](#)

ID	Form	Agency	Form Name	Total FTE	Total Expenses	Total Revenue
6194	3500	50500 - Cultural Affairs Department	Special, Supplemental & Del	0.00	\$0	\$75,000

Quick Search:

Actions: [Add New](#) [Copy](#)

Row	Audit Trail	PCode	Account	Account Name	FTE Request	Request	Comments / Notes
1	A	P539	111	General Fund Transfers	2.50	\$75,000	E

Records per page: Records: 1 - 1 of 1 - Pages: [<<<](#) [<<](#) [1](#) [>>](#) [>>>](#)

13.5. Explanation Tab

Detailed explanations for the request are entered on the Explanation tab.

13.5.1. Navigate to the Header tab, click **Explanation** to open.

13.5.2. Complete required fields. Click **Save** to update form.

Budget Form Header

Comment History Comment Submit Close

Instance ID	Form Definition	Definition Name	Name	Agency
6194	3500	Special, Supplemental & Deficiencies Request (3500)	Supplemental Request	50500

Stage Code:* 3501 P-Code 50500
 Initial Entry Cultural Affairs Department

Header Request **Explanation** Attachments

Save

Explain how \$ will be spend:

Brief description of problem agency is addressing:

How will agency

13.6. Attachments Tab

13.6.1. Attachments can be added to the form following the instructions outlined in Section 8.13 [Attachments Tab](#).

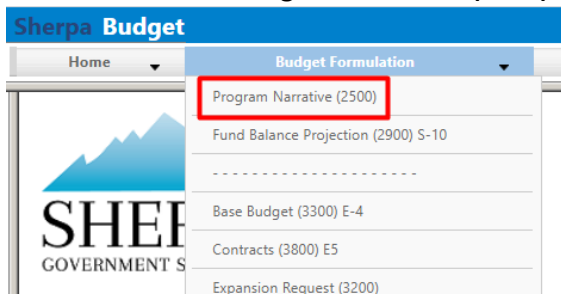
13.7. Submit

13.7.1. Once all transfers have been added to the form, submit the Transfers form following instructions from 8.14 [Submit Budget Form](#).

14. Program Narrative

Detailed descriptions of Programs are updated from the Program Narrative (2500) form. Existing narrative text from previous budget cycles will appear in the form. Users can edit text when needed following these instructions.

14.1.1. Select the **Program Narrative (2500)** form from the Budget Formulation menu.



- 14.1.2. Select an available form from the main Budget form screen or "List Page" and click **Header**. This page will return a form for each agency or program based on your security. If there are no agencies or programs assigned for your security role, this list will be blank. If you believe there is an error in the list of agencies or programs available in your list, then contact the BFM Administrator to update your security role.

Program Narrative

Quick Search: [Show Advanced Filters](#)

Record Actions:

Form ID	Description	Stage	Agency:	Form Rows	Last Update	Last User	Submit	Actions
5661	Museums and Historic Sites?	2501	P536	0	2/12/2021	chuck.hulem@s	Submit	Header

Records per page: 50
 - Records: 1 - Page: 1

The **Header** tab will load. Review or Enter text into the fields. Click **Save** to update the Program narrative.

Budget Form Header

[Comment History](#) [Comment](#) [Submit](#) [Close](#)

Instance ID	Form Definition	Definition Name	Name	Agency:
5661	2500	Program Narrative	Museums and Historic Sites?	P536

Stage Code:*

 Initial Entry

Header Attachments

Program Mission:
 The Museums and Monuments Program develops and enhances the quality of the state's museums and monuments. The program provides high-quality exhibits, performances and programs that showcase the arts, history and science of New Mexico and cultural traditions worldwide. They include diverse and changing exhibitions, performing arts events, films and other

Primary Services Provided/Beneficiaries, Current Service Level:

Major Issues, Accomplishments, Changes in Base Request:

Base Budget Increase Justification:

[Save](#)

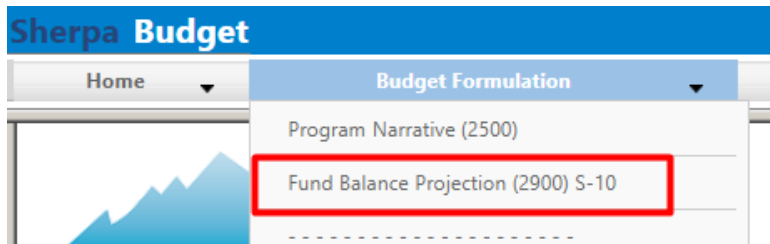
- 14.1.3. Attachments can be added to the form following the instructions outlined in Section 8.13 [Attachments Tab](#).

- 14.1.4. Once Program Narrative is updated, submit the form following instructions from 8.14 [Submit Budget Form](#).

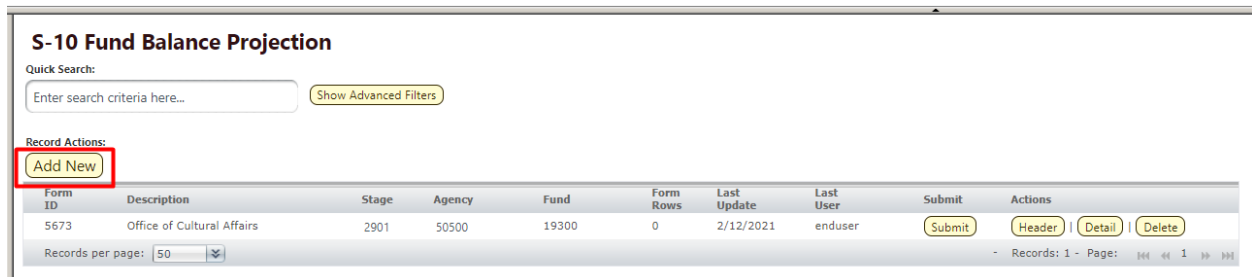
15. Fund Balance Projection

The Fund Balance Projection form To reflect the adjusted fund balance amount available at the end of prior fiscal year, as well as projected fund balances at the end of the current fiscal year, and the appropriation request for next fiscal year.

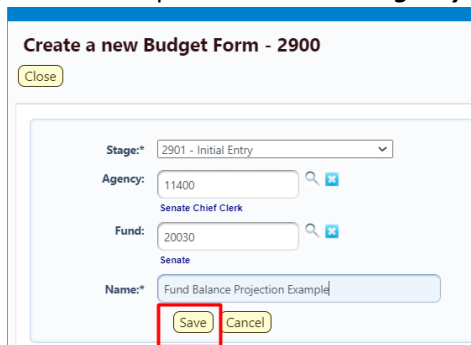
15.1.1. Select the **Fund Balance Projection (2900) S-10** form from the Budget Formulation menu.



15.1.2. Click **Add New**. Alternatively, click **Header** for an existing form and skip to Section 15.2.1 to continue to the Header tab.



15.1.3. On the Create a new Budget Form 3200 screen, select **Stage Code 2901 – Initial Entry** from the dropdown. Enter the **Agency** and **Fund** and **Name** of the Fund Balance Projection. Click **Save**.



15.2. Header Tab

15.2.1. Enter the **Legal Authority** on and click **Save** to update the form.

Budget Form Header

Instance ID	Form Definition	Definition Name	Name
6195	2900	S-10 Fund Balance Projection	Fund Balance Projection Example

Stage Code:* Agency Fund
Initial Entry Senate Chief Clerk Senate

Name:
 Legal Auth.

15.3. Detail Tab

15.3.1. Locate **Detail** and click to open the tab.

Name:
 Legal Auth.

The Fund Balance Projection form will load.

Budget Form Lines

ID	Form	Agency	Fund	Form Name
6195	2900	11400 - Senate Chief Clerk	20030 - Senate	S-10 Fund Balance Projection

Quick Search:

Actions:

Row	Audit Trail	Account	Account Name	2020-21 Fund Balance Projection*	Justification*
There are no records available.					

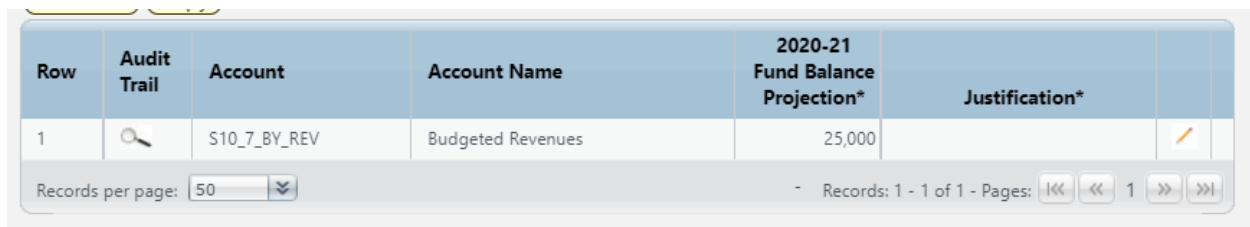
Records per page: Records: 0 - 0 of 0 - Pages:

The top table shows a read-only summary of the form. The columns are described in the table below.

ID	Form	Agency	Fund	Form Name
6195	2900	11400 - Senate Chief Clerk	20030 - Senate	S-10 Fund Balance Projection

Screen:	Fund Balance Projection S-10 (2900) Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Fund	Read Only. Fund Code and Name
Form Name	Read Only. Name of Form

The second table contains the Special, Supplemental & Deficiencies request data. Again, the example screenshot below shows a form populated with data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the form.



Screen:	Fund Balance Projection S-10 (2900) Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
Account	Read Only. Contains PCode Number.
Account Name	Read Only. Budget line for Account Name
20XX-XX Fund Balance Projection*	Data Entry Column. Enter Fund Balance Projection for the end of the current fiscal year
Justification *	Data Entry Column. Enter Justification text
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

15.3.2. Click **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#) and Section 8.11 [Add New Budget Entry](#).

- The Agency and Fund will be pre-populated with the Agency and Fund selected at form creation.
- Enter the **Account** code; click the Magnifying Glass to select from a list filtered to S-10 Report Account Codes
- Enter the **Justification**
- Enter the **Fund Balance Projection** for the end of the current fiscal year

15.3.3. Click **Save**. The Fund Balance Projection form will load with new data.

ID	Form	Agency	Fund	Form Name
6195	2900	11400 - Senate Chief Clerk	20030 - Senate	S-10 Fund Balance Projection

Row	Audit Trail	Account	Account Name	2020-21 Fund Balance Projection*	Justification*
1		S10_7_BY_REV	Budgeted Revenues	25,000	

15.3.4. Once Fund Balance Projection is updated, submit the form following instructions from 8.14 [Submit Budget Form](#).

15.4. Report

15.4.1. Data from the Fund Balance Projection form can be viewed in the S-10 Fund Balance Projection Report. See Section 21 [BFM Reporting](#) for instructions on how to access reports.

16. FTE Counts

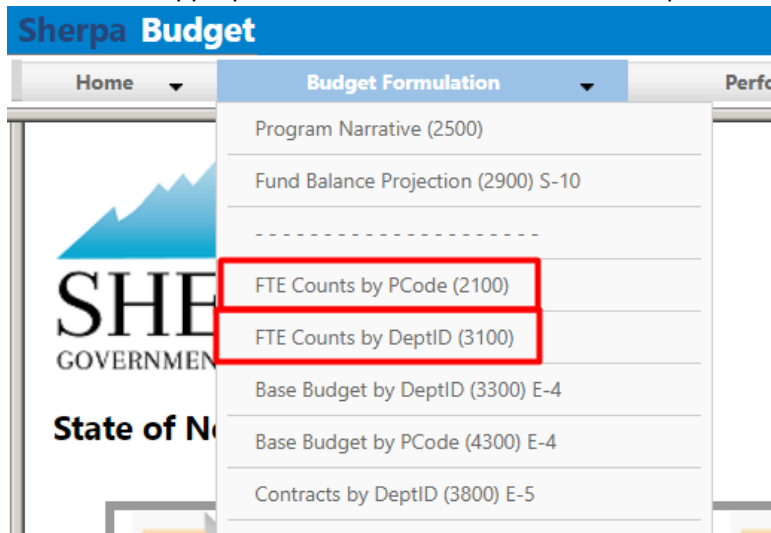
The FTE Counts form displays the Full Time Equivalents calculated by the BFM Personnel Cost Forecasting (PCF) tool, including filled and vacant positions. The FTE Counts form provides Agencies the ability to request the number of FTEs to include in the budget. **Please note: Position requests will be submitted via the expansion request module.**

Similar to the Base Budget E-4 and Contracts E-5 forms, the FTE Counts has two forms available: FTE Counts by DeptID form 2100 and FTE Counts by PCode form 3100. Agencies will select one form, either by DeptID 2100 or by PCode 3100, for each PCode to complete and submit for appropriations request.

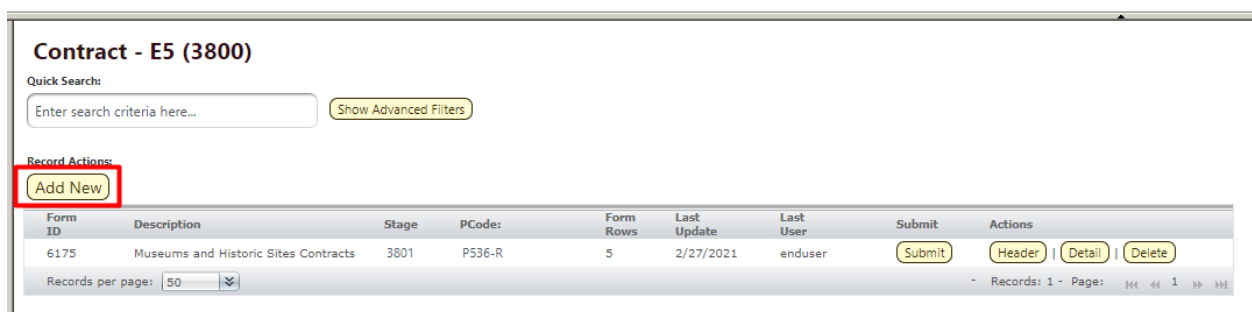
The following instructions show screenshots for the FTE Count by Dept ID 2100 form, but these instructions apply to both FTE Counts forms.

16.1. Create New Form

16.1.1. Navigate to the FTE Counts form by hovering over the **Budget Formulation** menu and select the appropriate **FTE Counts** form from the dropdown menu.



16.1.2. Click **Add New** to begin a new form. Alternatively, click **Detail** for an existing form to edit and proceed to step 16.1.5.



16.1.3. Select **Stage Code 3101 – Initial Entry** from the dropdown. Enter the **PCode** and **Name** of the form. Click **Save**.

Create a new Budget Form - 3100

Close Screen Configuration Action Configuration

Stage:* 3101 - Initial Entry

Pcode: P539-R
Library Services

Name:* P539-R Library Services

Save Cancel

16.1.4. The budget form header will load. Click **FTE Counts** to load the Details screen.

Budget Form Header

Comment History Comment Submit Configuration Close

Instance ID	Form Definition	Definition Name	Name	PCode
7784	3100	FTE Counts by DeptID	P539-R Library Services	P539

Stage Code:* 3101
Initial Entry

PCode: P539-R
Library Services

Header FTE Counts Attachments

Name: P539-R Library Services

16.1.5. The budget form will load.

Budget Form Lines

Close Export Import Refresh

ID	Form	PCode:	Form Name	Total PCF FTE	Total Opbud FTE	Total FTE Request
7784	3100	P539-R - Library Services	FTE Counts by DeptID	45.00	0.00	0.00

Quick Search:

Actions: Add New Copy Zero Out Screen Configuration Action Configuration Validation Configuration

Row	Audit Trail	Department	Fund	Account	Account Name	2020-2021 PCF Projection	2019-20 Opbud	2020-21 FTE Request*	Justification*
1		6000000000-50500	19301	810	Permanent	32.00	0.00	0.00	
2		6000000000-50500	19302	810	Permanent	3.00	0.00	0.00	
3		6000000000-50500	19302	820	Term	10.00	0.00	0.00	

Records per page: 50
 - Records: 1 - 3 of 3 - Pages: 1

The top table shows a read-only summary of the form. The columns are described below.

Budget Form Lines

Close Export Import Refresh

ID	Form	PCode:	Form Name	Total PCF FTE	Total Opbud FTE	Total FTE Request
7784	3100	P539-R - Library Services	FTE Counts by DeptID	45.00	0.00	0.00

Screen:	FTE Counts by DeptID 3100 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
PCode	Read Only. PCode and Program Name
Form Name	Read Only. Form Name
Total PCF FTE	Read Only. Total FTEs calculated in PCF Projection
Total OpBud FTE	Read Only. Total FTEs included in current year OpBud
Total FTE Request	Read Only. Total FTE requested on form

The second table contains the FTE Counts request data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data.

Row	Audit Trail	Department	Fund	Account	Account Name	2020-2021 PCF Projection	2019-20 Opbud	2020-21 FTE Request*	Justification*	
1		6000000000-50500	19301	810	Permanent	32.00	0.00	0.00		
2		6000000000-50500	19302	810	Permanent	3.00	0.00	0.00		
3		6000000000-50500	19302	820	Term	10.00	0.00	0.00		

Records per page: 50 Records: 1 - 3 of 3 - Pages: <<< << 1 >> >>>

Screen:	FTE Counts by DeptID 3100 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
Department	Read Only. Contains 10 digit DeptID Number + Agency Code.
Department Name	Read Only. <i>This column is minimized, use double arrows to expand.</i>
Fund	Read Only. Budget line for Fund
Fund Name	Read Only. <i>This column is minimized, use double arrows to expand.</i>
Account	Read Only. Budget line for Account
Account Name	Read Only. Budget line for Account Name
20XX-20XX PCF Projection	Read Only. FTE Count calculated by PCF Projection
20XX-20XX OpBud*	Data Entry Column. Enter current year OpBud FTE Count. Note: <i>During the first year of using BFM, users must enter this amount. In future years, this will be pre-populated based on previous year's form data.</i>
20XX-XX FTE Request*	Data Entry Column. Enter requested FTE Count for budget.
Justification*	Entry Column. Enter text justification
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

16.1.6. Enter data into the budget form following the instructions from Section 8.4 [Excel Export/Import](#) or Section 8.11 [Add New Budget Entry](#).

To complete this budget form, enter a new line for each contract by clicking **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet.

- Enter the Department, Fund, and Account Numbers
- Enter the Justification
- Enter the current **OpBud** FTE Count (in the first year of using the system, in subsequent years this will be auto-populated based on previous year's form data)
- Enter the **FTE Request** (You will enter the OPBUD FTE count here, your request to increase FTE should be entered in the expansion form).

Budget Form Entry - Add New Line

Page Actions: Close Screen Configuration Action Configuration

Form ID	Form Definition
7784	3100

Department State Library Division
Fund Office Of Cultural Aff
Account Permanent
Save Cancel

Justification:

2019-20 Opbud : **Audit Text:**

2020-21 FTE Request*: **Audit Text:**

16.1.7. Click **Save**. The new line item will appear in the list. The Total OpBud FTE and Total FTE Request amounts will be updated in the top table on the form screen.

Budget Form Lines

Close Export Import Refresh

ID	Form	PCode:	Form Name	Total PCF FTE	Total Opbud FTE	Total FTE Request
7784	3100	P539-R - Library Services	FTE Counts by DeptID	45.00	31.00	32.00

Quick Search:

Actions: Add New Copy Zero Out Screen Configuration Action Configuration Validation Configuration

Row	Audit Trail	Department	Fund	Account	Account Name	2020-2021 PCF Projection	2019-20 Opbud	2020-21 FTE Request*	Justification*
1		6000000000-50500	19300	810	Permanent	0.00	31.00	32.00	
2		6000000000-50500	19301	810	Permanent	32.00	0.00	0.00	
3		6000000000-50500	19302	810	Permanent	3.00	0.00	0.00	
4		6000000000-50500	19302	820	Term	10.00	0.00	0.00	

Records per page: 50 | Records: 1 - 4 of 4 - Pages: 1

16.1.8. Once all FTE Counts have been added to the form, submit Budget form following instructions from 8.14 [Submit Budget Form](#).

16.2. Report

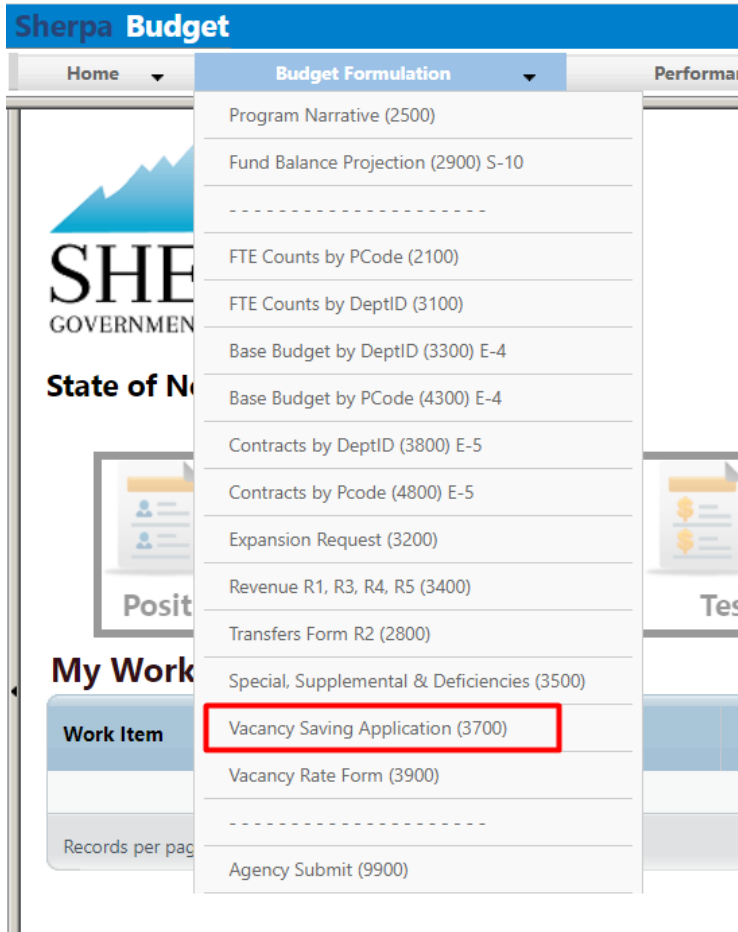
16.2.1. Data from the FTE Counts forms can be viewed as reports. The FTE Count Requests By DeptID and FTE Count Requests by PCode reports can be accessed in 3.2 Personnel folder.

See Section 21 [BFM Reporting](#) for detailed instructions on how to access reports.

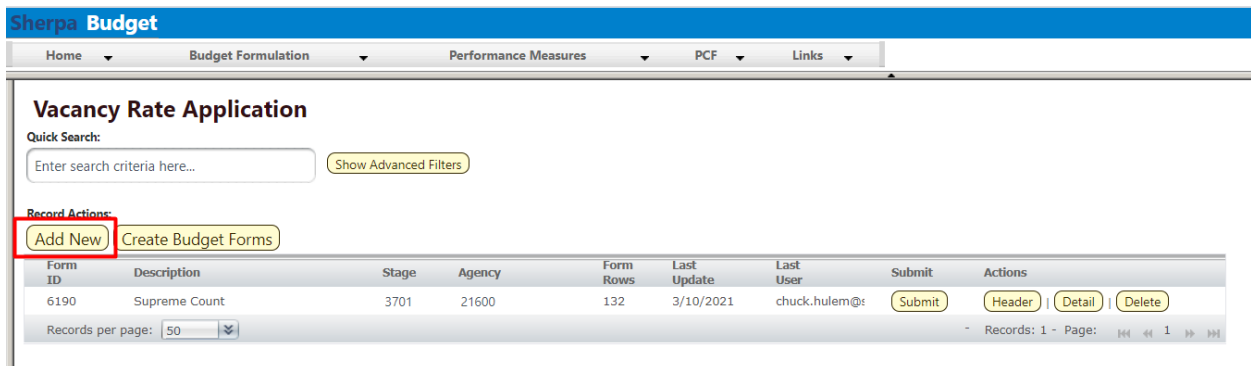
17. Vacancy Savings Application

The Vacancy Savings Application (3700) form allows users to enter a vacancy savings percentage to adjust PCF Projection calculated by BFM.

- 17.1.1. Navigate to the form by hovering over the **Budget Formulation** menu and clicking **Vacancy Savings Application (3700)**.



- 17.1.2. Click **Add New**. Alternatively, click **Detail** for an existing form and skip to Section 17.1.5 to continue to the Header tab.



17.1.3. For **Stage**, select 3701 – Initial Entry from the dropdown menu. Enter the appropriate **Agency** code or use the Magnifying Glass to select from a filtered list. Enter a **Name** for the form. Click **Save** to create the form.

Create a new Budget Form - 3700

Close

Stage:* 3701 - Initial Entry

Agency: 50500
Cultural Affairs Department

Name:* Cultural Affairs Department Vacancy Savings

Save Cancel

17.1.4. The Header tab will open. Click the **Request** tab to navigate to the **Details** screen.

Budget Form Header

Comment History Comment Submit Close

Instance ID	Form Definition	Definition Name	Name	Agency
7783	3700	Vacancy Rate Application	Cultural Affairs Department Vacanc	50500

Stage Code:* 3701
Initial Entry

P-Code 50500
Cultural Affairs Department

Header Request Explanation Attachments

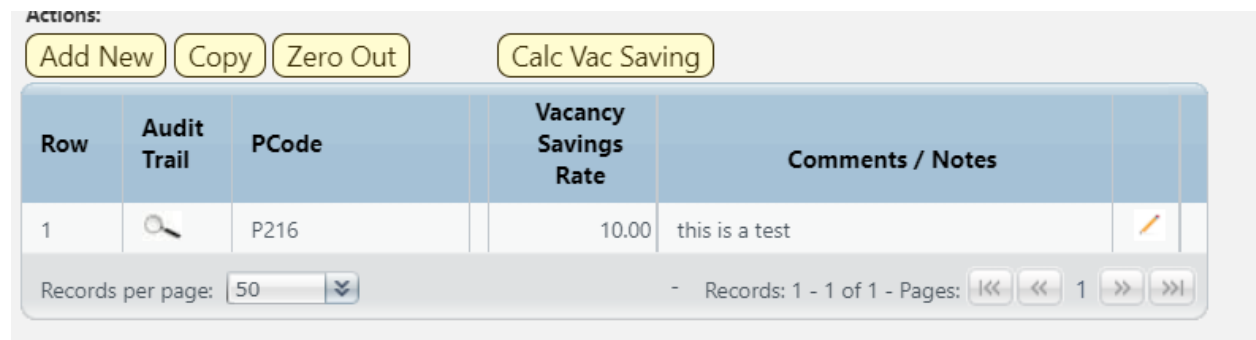
17.1.5. The Vacancy Savings Application form will load.

The top table shows a read-only summary of the form. The columns are described in the table below.

ID	Form	Agency	Form Name	Total S&EB	Vacancy Savings	Net S&EB
7783	3700	50500 - Cultural Affairs Department	Vacancy Rate Application	\$34,962,021	\$0	\$34,962,021

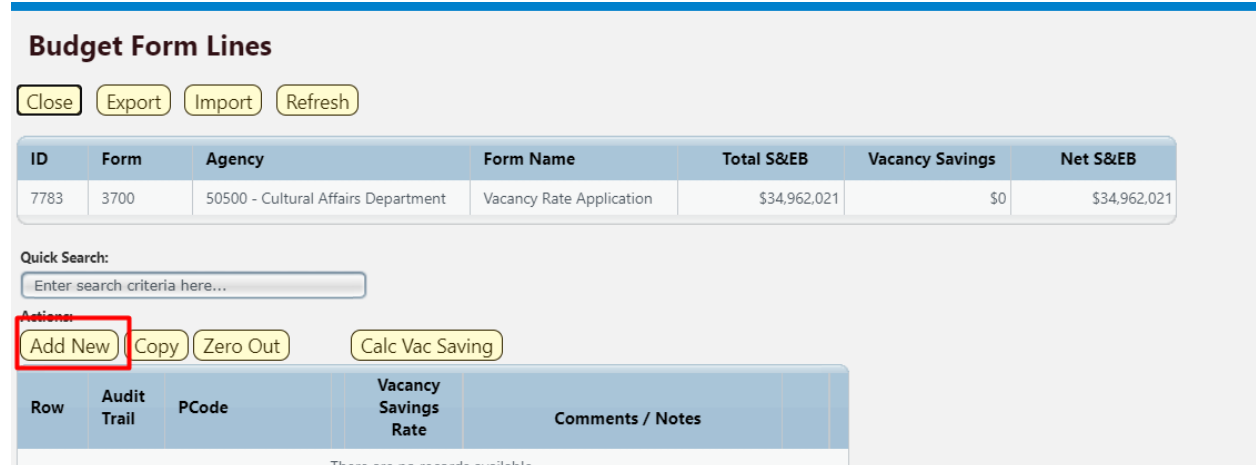
Screen:	Vacancy Rate Application 3700 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Form Name	Read Only. Name of Form
Total S&EB	Total S&EB calculated in the PCF projection
Vacancy Savings	Calculated based on Vacancy Savings Rate entered on form
Net S&EB	Total S&EB less Vacancy Savings

The second table contains the Special, Supplemental & Deficiencies request data. Again, the example screenshot below shows a form populated with data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the form.



Screen:	Vacancy Rate Application 3700 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
PCode	Read Only. PCode
PCode Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Vacancy Savings Rate*	Data Entry Column. Enter the Vacancy Savings percentage.
Comments / Notes*	Data Entry Column. Enter Comments.
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

17.1.6. Click **Add New**.



17.1.7. Complete the Budget Form.

Note: this can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#) and Section 8.11 [Add New Budget Entry](#).

- Enter the **PCode**; click the Magnifying Glass to select from a filtered list of PCodes based on the Agency selected during form creation
- Enter the **Comments / Notes**, if needed
- Enter percentage amount in **Vacancy Savings Rate**

Click **Save**.

Budget Form Entry - Add New Line

Page Actions:

Form ID	Form Definition
7783	3700

PCode:

Museums and Histori

Comments / Notes:

Vacancy Savings Rate: Audit Text:

17.1.8. The line item will appear on the form. Click **Calc Vac Savings**.

Budget Form Lines

ID	Form	Agency	Form Name	Total S&EB	Vacancy Savings	Net S&EB
7783	3700	50500 - Cultural Affairs Department	Vacancy Rate Application	\$34,962,021	\$0	\$34,962,021

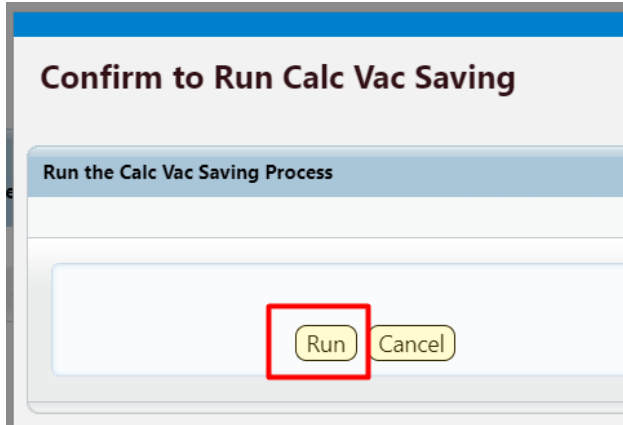
Quick Search:

Actions:

Row	Audit Trail	PCode	Vacancy Savings Rate	Comments / Notes
1	<input type="button" value="Search"/>	P536	7.50	<input type="button" value="Edit"/>

Records per page: 50 - Records: 1 - 1 of 1 - Pages: 1

17.1.9. Click **Run**.



17.1.10. When the calculation is completed, the **Vacancy Savings** amount will appear in the table at the top of the screen, and the **Net S&EB** will be calculated.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name	Total S&EB	Vacancy Savings	Net S&EB
7783	3700	50500 - Cultural Affairs Department	Vacancy Rate Application	\$34,962,021	(\$1,756,078)	\$33,205,943

Quick Search:

Actions:
 Add New Copy Zero Out Calc Vac Saving

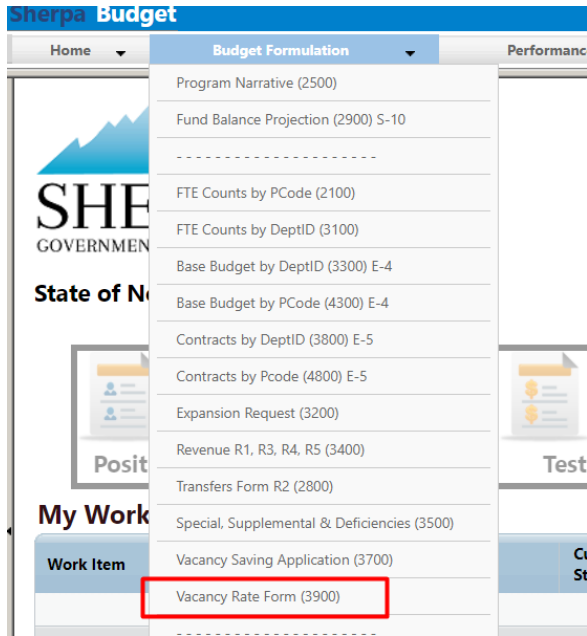
Row	Audit Trail	PCode	Vacancy Savings Rate	Comments / Notes
1		P536	7.50	

Records per page: 50 - Records: 1 - 1 of 1 - Pages: <<< << 1 >> >>>

18. Vacancy Rate Form

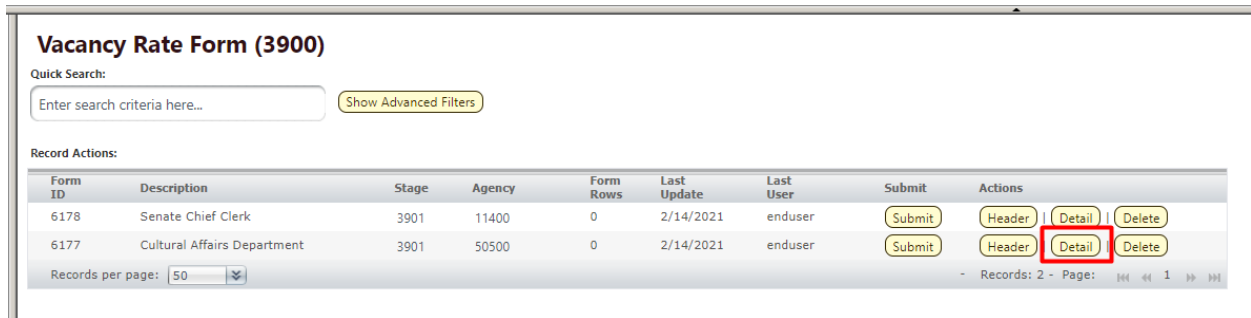
The Vacancy Rate Form (3900) provides a way to enter monthly vacancy rate.

18.1.1. Navigate to the form by hovering over the **Budget Formulation** menu and clicking **Vacancy Rate Form (3900)**.

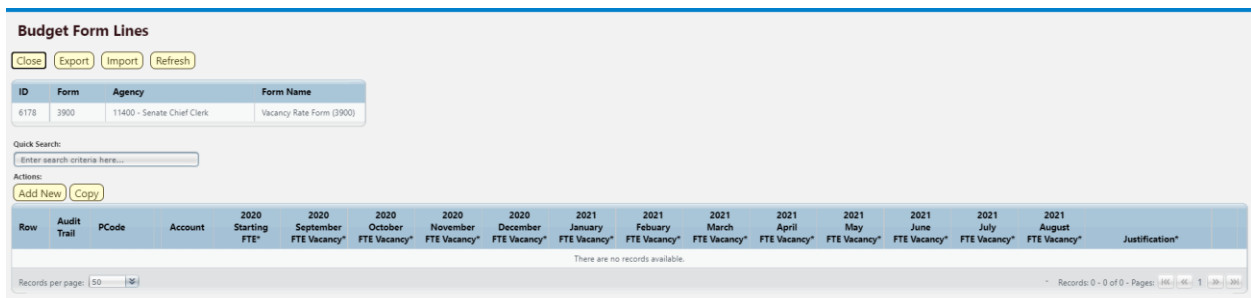


18.1.2. Select an available form from the main Vacancy Rate form screen or "List Page." This page will return a form for each agency based on your security. If there are no agencies assigned for your security role, this list will be blank. If you believe there is an error in the list available to you, then contact the BFM Administrator to update your security role.

18.1.3. To edit, click **Detail**.



The Vacancy form will load.



The top table shows a read-only summary of the form.

Screen:	Vacancy Rate Form 3900 Budget Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Form Name	Read Only. Form Name

The second table contains the form data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data.

Screen:	Vacancy Rate Form 3900 Budget Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
PCode	Read Only. Contains PCode Number.
PCode Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Account	Read Only. Budget line for Account
20XX Starting FTE*	Data Entry Column. Authorized FTE count for beginning of year.
20XX September – August FTE Vacancy*	Data Entry Columns. Enter FTE Vacancy count for each month.
Justification*	Entry Column. Enter text justification
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

18.1.4. Edit an existing budget line or click **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#) and Section 8.11 [Add New Budget Entry](#).

- Enter the **PCode**; click the Magnifying Glass to select from a filtered list of PCodes based on Agency form selected
- Enter the **Account** ; click the Magnifying Glass to select **Authorized FTE** or **Vacancy FTE**
- Enter the **Justification**

Budget Form Entry - Add New Line

Page Actions:

Form ID	Form Definition
6177	3900

PCode:
 Museums and Histori

Account:
 Authorized FTE

Justification:

2020 Starting FTE*:

Audit Text:

18.1.5. Click **Save**. The new vacancy rate form will appear in the list.

Budget Form Lines

ID	Form	Agency	Form Name
6177	3900	50500 - Cultural Affairs Department	Vacancy Rate Form (3900)

Quick Search:

Actions:

Row	Audit Trail	PCode	Account	2020 Starting FTE	2020 September FTE Vacancy*	2020 October FTE Vacancy*	2020 November FTE Vacancy*	2020 December FTE Vacancy*	2021 January FTE Vacancy*	2021 February FTE Vacancy*	2021 March FTE Vacancy*	2021 April FTE Vacancy*	2021 May FTE Vacancy*	2021 June FTE Vacancy*	2021 July FTE Vacancy*	2021 August FTE Vacancy*	Justification*
1		P536	AUTHFTE	375.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	

Records per page: | Records: 1 - 1 of 1 - Pages: 1

18.1.6. Double-click the line or click the Pencil Icon to edit the monthly vacancy rate. Click **Save All**.

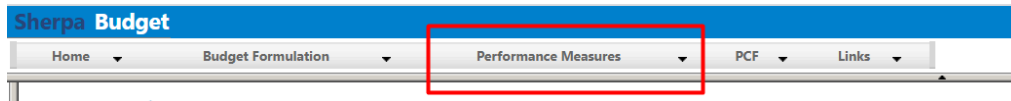
2021 May FTE Vacancy*	2021 June FTE Vacancy*	2021 July FTE Vacancy*	2021 August FTE Vacancy*	Justification*
<input type="text" value="0.00"/>	<input type="text" value="3"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text"/>

Records: 1 - 1 of 1 - Pages: 1

18.1.7. Once the monthly Vacancy Rate is updated, submit the form following instructions from 8.14 [Submit Budget Form](#).

19. Performance Measures

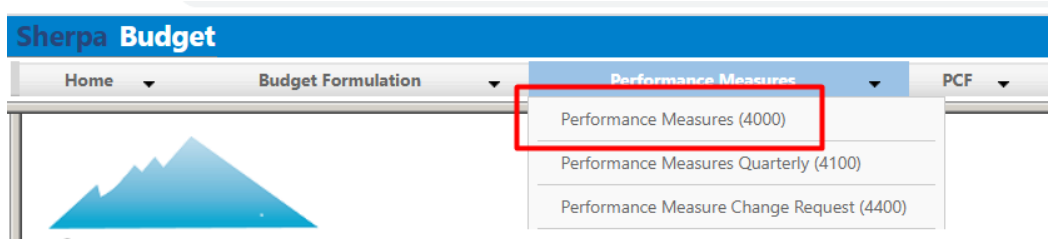
Forms for Performance Measures tracking are located in the Performance Measures top level navigation menu.



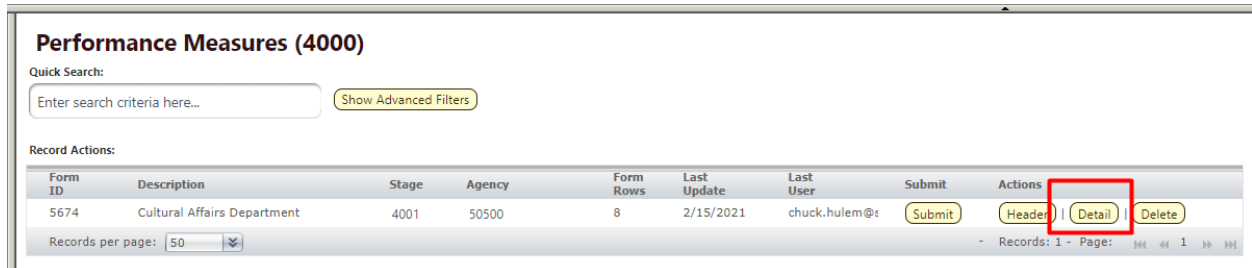
19.1. Performance Measures

Performance Measures are captured in BFM in the Performance Measures 4000 form.

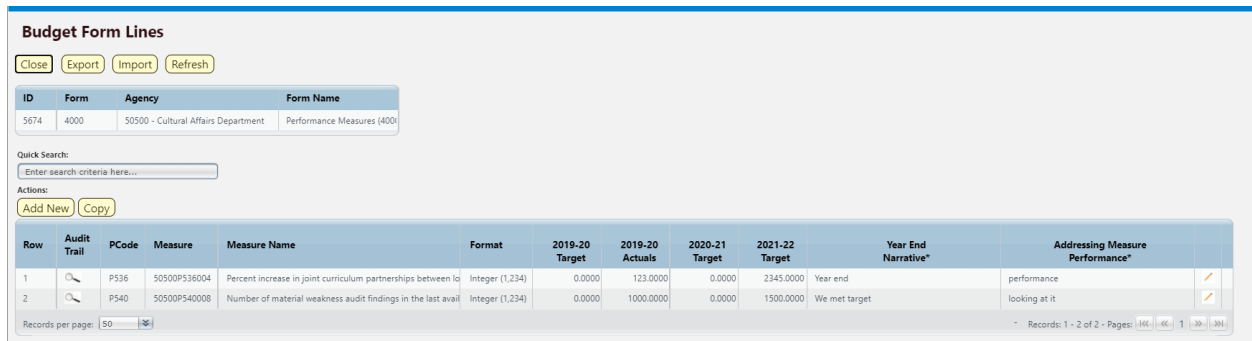
19.1.1. Navigate to the form by hovering over the **Performance Measures** menu and clicking **Performance Measures (4000)**.



19.1.2. Select an available form from the main Performance Measures form screen or "List Page" and click **Detail**. This page will return a form for each Agency based on your security. If there are no agencies or programs assigned for your security role, this list will be blank. If you believe there is an error in the list of agencies or programs available in your list, then contact the BFM Administrator to update your security role.



19.1.3. The Performance Measures Detail form will load.



The top table shows a read-only summary of the form.

Screen:	Performance Measures 4000 Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Form Name	Read Only. Form Name

The second table contains the performance measures data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the Performance Measures 4000 form.

Row	Audit Trail	PCode	Measure	Measure Name	Format	2019-20 Target	2019-20 Actuals*	2020-21 Target	2021-22 Target*	Year End Narrative*	Addressing Measure Performance*
1		P536	50500P536004	Percent increase in joint curriculum partnerships between	Percent (12%)	0.0000	75.0000	0.0000	100.0000	Target not met because abc	Performance being addressed by xyz
2		P536	50500P536005	Number of students taught through programming develop	Integer (1,234)	0.0000	1.0000	0.0000	5.0000		

Screen:	Performance Measures 4000 Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
PCode	Read Only. PCode Number
Measure	Read Only. Measure Number
Measure Name	Read Only. Measure Name / Description
Format	Read Only. The format for the Performance Measure Value, this will be based on the measure selected
20XX-XX Target	Read Only. Previous fiscal year's Target Performance Measure Value
20XX-XX Actuals*	Data Entry Column. Enter previous fiscal year's Actuals Performance Measure Value
20XX-XX Target	Read Only. Current fiscal year's Target Performance Measure Value
20XX-XX Target*	Data Entry Column. Enter the proposed Target Performance Measure Value
Year End Narrative*	Data Entry Column. Enter Year End Narrative text
Addressing Measure Performance*	Data Entry Column. Enter how measured performance is being addressed
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

19.1.4. Click **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#) and Section 8.11 [Add New Budget Entry](#).

- **Agency** will be populated based on Performance Measure form selected.

- Select Performance **Measure** Number; click the Magnifying Glass to select from a list filtered to available Measures based on Agency
 - o **Note:** Once Measure is selected, blue text beneath field will display the type of the Performance Measure Value. In the example below, the type is *number*. The format (displayed on the Measures/Detail screen) for this measure type is *integer*.
- Enter the **Year End Narrative**, describe if the performance measure was met or not
- Enter the **Addressing Measure Performance**, describe how performance is being address
- Enter previous fiscal year's **Actual** Performance Measure Value
 - o **Note:** if entering data on an existing Performance Measure, then values will combine with existing values (not overwrite) on form when updated
- Enter current fiscal year's **Target** Performance Measure Value
 - o **Note:** if entering data on an existing Performance Measure, then values will combine with existing values (not overwrite) on form when updated

Budget Form Entry - Add New Line

Page Actions:

Close

Form ID	Form Definition
5674	4000

Agency

50500
🔍
✖

Cultural Affairs Department

Measure:

50500P761006
🔍
✖

Number of new arts v

Save

Cancel

Year End Narrative

Target not met because abc

Addressing Measure Performance

Performance being addressed by xyz

2019-20 Actuals: 100.00

2021-22 Target: 50.00

Audit Text:

Audit Text:

Click **Save**. The new Measure will appear in the form.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name
5674	4000	50500 - Cultural Affairs Department	Performance Measures (400)

Quick Search:

Actions: Add New Copy

Row	Audit Trail	PCode	Measure	Measure Name	Format	2019-20 Target	2019-20 Actuals	2020-21 Target	2021-22 Target	Year End Narrative*	Addressing Measure Performance*
1		P536	50500P536004	Percent increase in joint curriculum partnerships between lo	Integer (1,234)	0.0000	38.0000	0.0000	30.0000	xyz	abc
2		P537	50500P537002	Percent of grant funds from recurring appropriations distrib	Integer (1,234)	0.0000	15.0000	0.0000	15.0000		
3		P540	50500P540008	Number of material weakness audit findings in the last avail	Integer (1,234)	0.0000	1000.0000	0.0000	1500.0000	We met target	looking at it
4		P761	50500P761006	Number of new arts ventures, businesses or projects jump-s	Integer (1,234)	0.0000	100.0000	0.0000	50.0000	Target not met because abc	Performance being addressed by xyz

Records per page: 50

19.1.5. Once all Performance Measures are added to the form, submit the form following instructions from 8.14 [Submit Budget Form](#).

19.2. Performance Measures Quarterly

19.2.1. Navigate to the form by hovering over the **Budget Formulation** menu and clicking **Performance Measures Quarterly (4100)**.

Sherpa Budget

Home Budget Formulation Performance Measures PCF

Performance Measures (4000)

Performance Measures Quarterly (4100)

Performance Measure Change Request (4400)

19.2.2. Select an available form from the main Performance Measures form screen or "List Page" and click **Detail**. This page will return a form for each Agency based on your security. If there are no agencies or programs assigned for your security role, this list will be blank. If you believe there is an error in the list of agencies or programs available in your list, then contact the BFM Administrator to update your security role.

Performance Measures Quarterly (4100)

Quick Search: Show Advanced Filters

Record Actions: Add New

Form ID	Description	Stage	Agency	Form Rows	Last Update	Last User	Submit	Actions
5670	Cultural Affairs Department	4101	50500	12	3/3/2021	enduser	Submit	Header Detail Delete

Records per page: 50

Records: 1 - Page: 1

19.2.3. The Performance Measures Detail form will load.

Budget Form Lines

Close Export Import Refresh

ID	Form	Agency	Form Name
5670	4100	50500 - Cultural Affairs Department	Performance Measures Quar

Quick Search:
Enter search criteria here...

Actions:
Add New Copy

Row	Audit Trail	PCode	Measure	Measure Name	Format	2020-21 Target	2020-21 Quarter 1 Results*	2020-21 Quarter 2 Results*	2020-21 Quarter 3 Results*	2020-21 Quarter 4 Results*	Addressing Measure Performance*
1		P536	50500P536001	Attendance to museum and historic site exhibitions, performances, films and oth	Integer (1,234)	0.0000	105.00	210.00	315.00	425.00	Increasing xyz
2		P536	50500P536006	Number of people served through programs and services offered by museums a	Integer (1,234)	0.0000	100.00	200.00	0.00	0.00	

Records per page: 50

Records: 1 - 2 of 2 - Pages: 1

The top table shows a read-only summary of the form.

Screen:	Performance Measures Quarterly 4100 Form Lines
Field (Column Name)	Description
ID	Read Only. Form Instance ID
Form	Read Only. Form number
Agency	Read Only. Agency Code and Name
Form Name	Read Only. Form Name

The second table contains the quarterly performance measures data. Some columns contain read-only data; this data is either system data, imported from another source such as the financial system, or are calculated based on other values in the form. Columns with an asterisk (*) are data entry columns, where users enter the budget request data. The table below describes the columns for the Performance Measures Quarterly form.

Row	Audit Trail	PCode	Measure	Measure Name	Format	2020-21 Target	2020-21 Quarter 1 Results*	2020-21 Quarter 2 Results*	2020-21 Quarter 3 Results*	2020-21 Quarter 4 Results*	Addressing Measure Performance*
1		P536	50500P536001	Attendance to museum and historic site exhibitions, performances, films and oth	Integer (1,234)	0.0000	100.00	200.00	300.00	400.00	Increasing
2		P536	50500P536006	Number of people served through programs and services offered by museums a	Integer (1,234)	0.0000	100.00	200.00	0.00	0.00	

Records per page: 50

Records: 1 - 2 of 2 - Pages: 1

Screen:	Performance Measures Quarterly 4100 Form Lines
Field (Column Name)	Description
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
PCode	Read Only. PCode Number
Measure	Read Only. Measure Number
Measure Name	Read Only. Measure Name / Description
Format	Read Only. The format for the Performance Measure Value, this will be based on the measure selected
20XX-XX Target	Read Only. Previous fiscal year's Target Performance Measure Value

Screen:	Performance Measures Quarterly 4100 Form Lines
Field (Column Name)	Description
20XX-XX Quarter 1 Results*	Data Entry Column. Enter Performance Measure Results from Q1
20XX-XX Quarter 2 Results*	Data Entry Column. Enter Performance Measure Results from Q2
20XX-XX Quarter 3 Results*	Data Entry Column. Enter Performance Measure Results from Q3
20XX-XX Quarter 4 Results*	Data Entry Column. Enter Performance Measure Results from Q4
Addressing Measure Performance*	Data Entry Column. Enter how measured performance is being addressed
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

19.2.4. Click **Add New**. This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#) and Section 8.11 [Add New Budget Entry](#).

- **Agency** will be populated based on Performance Measure form selected.
- Select Performance **Measure** Number; click the Magnifying Glass to select from a list filtered to available Measures based on Agency.
 - o **Note:** Once Measure is selected, blue text beneath field will display the type of the Performance Measure Value. In the example below, the type is *number*. The format (displayed on the Measures/Detail screen) for this measure type is *integer*.
- Enter the **Addressing Measure Performance**, describe how performance is being address.
- Enter the appropriate **Quarter Results**.

Budget Form Entry - Add New Line

Page Actions: Close

Form ID	Form Definition
5670	4100

Agency: Cultural Affairs Department Measure: Number of people se

Save Cancel

Addressing Measure Performance:

2020-21 Quarter 1 Results*: Audit Text:

2020-21 Quarter 2 Results*: Audit Text:

2020-21 Quarter 3 Results*: Audit Text:

2020-21 Quarter 4 Results*: Audit Text:

Click **Save**. The Measure will appear in the form.

Row	Audit Trail	PCode	Measure	Measure Name	Format	2020-21 Target	2020-21 Quarter 1 Results*	2020-21 Quarter 2 Results*	2020-21 Quarter 3 Results*	2020-21 Quarter 4 Results*	Addressing Measure Performance*
1		P536	50500P536001	Attendance to museum and historic site exhibitions, performances, films and oth	Integer (1,234)	0.0000	105.00	210.00	315.00	425.00	Increasing xyz
2		P536	50500P536006	Number of people served through programs and services offered by museums a	Integer (1,234)	0.0000	100.00	200.00	0.00	0.00	

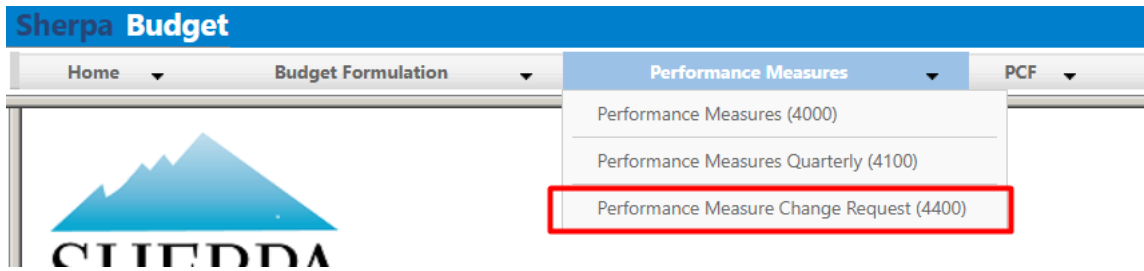
Records per page: 50 | Records: 1 - 2 of 2 - Pages: 1 | 1 | 2

19.2.5. Once all Performance Measures are added to the form, submit the form following instructions from 8.14 [Submit Budget Form](#).

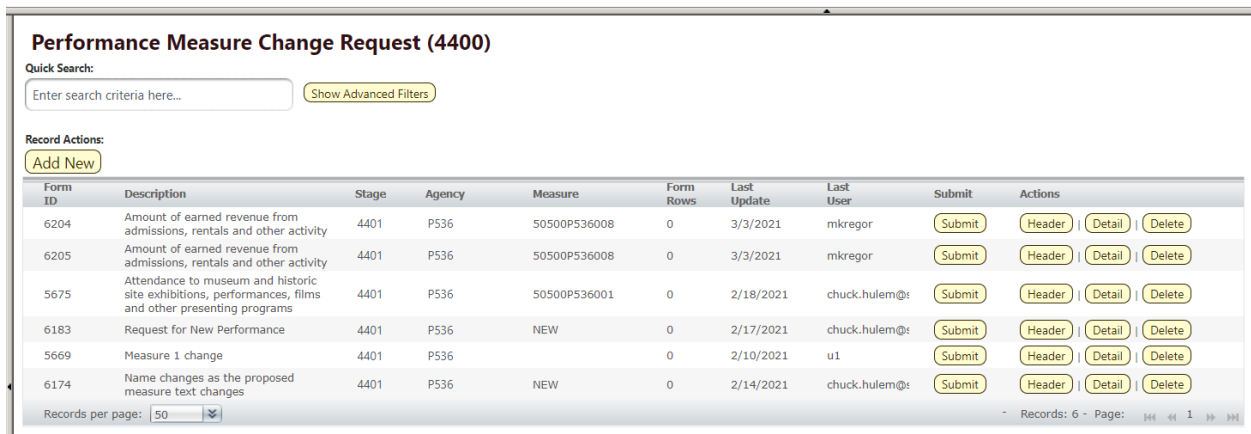
19.3. Performance Measure Change Request

Changes to existing Performance Measures can be requested through the BFM Performance Measure Change Request Form 4400 during the Accountability in Government Act starting July 15 and ending 30 days after.

19.3.1. Navigate to the form by hovering over the **Budget Formulation** menu and clicking **Performance Measures Quarterly (4400)**.

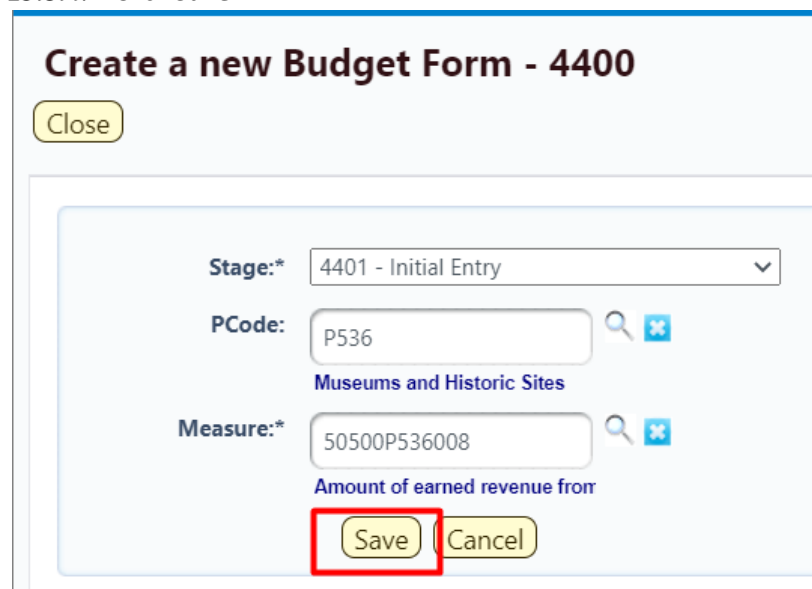


19.3.2. Select an available Change Request from the main form screen or "List Page" and click **Header**; or click **Add New** to create a new change request.



19.3.3. Select **Stage** 4401 – Initial Entry. Enter **Agency** code or use the Magnifying Glass to select from a filtered list based on user security. Enter **Name** for the proposed Transfer.

19.3.4. Click **Save**.



19.3.5. On the **Header** tab, update the form fields.

- **Existing Measure (Changes Not Saved)** will be populated based on the existing Performance Measure text. Any changes to this text will be ignored when saved.
- **Proposed Measure** – enter the new proposed Measure text.
- **Explanation of Change** – enter text to explain the requested change.
- **SBD’s Analyst Comments** – text field for Analyst’s comments.
- **Consensus Reached** – check if applies to measure
- **Current HB2 Flag** – check if applies to measure
- **Proposed HB2 Flag** – check if applies to measure
- **Proposed Key Flag** – check if proposed key measure
- **FY Last Reviewed/Updated** – select the year
- **Inactive Year** – select Keep Active, or select a date to set this measure as inactive
- **Measure Type** –
- **Measure Format** – select appropriate format, i.e., integer, money, percent, etc.
- **Direction Good** – set the desirable outcome of the target performance measure value
 - o Result Over Target = Target Met
 - o Result Under Target = Target Met
- **Sort Order** – select the sort order

Budget Form Header

Comment History
Comment
Submit
Configuration
Close

Instance ID	Form Definition	Definition Name	Name	PCode:	Measure
6205	4400	Performance Measure Change Request (4400)	Amount of earned revenue from ad	P536	50500P536008

Stage Code:*
4401
Initial Entry

PCode:
P536
Museums and Historic Sites

Measure
50500P536008
Amount of earned revenue from

Header
Narrative Changes
Attachments

Existing Measure (Changes not saved):

Amount of earned revenue from admissions, rentals and other activity

Proposed Measure:

Explanation of Change:

SBD Analyst's Comments:

Save

Consensus Reached:

Current HB2 Flag:

Proposed HB2 Flag:

Current Key Flag:

Proposed Key Flag:

FY Last Reviewed/Updated:

Inactive in Year:

Measure Type:

Measure Format:

Good Direction:

Sort Order:

19.3.6. Click **Save**. The Measure will save. Navigate to the **Narrative Changes** tab.

Budget Form Header
Comment History Comment Submit Configuration Close

Performance Measure Change Request (4400) was successfully updated.

Instance ID	Form Definition	Definition Name	Name	PCode:
6205	4400	Performance Measure Change Request (4400)	Amount of earned revenue from ad	P536

Stage Code:* 4401 PCode: P536 Measure 50500P536008
Initial Entry Museums and Historic Sites Amount of earned revenue from

Header Narrative Changes Attachments

Amount of earned revenue from admissions, rentals and other activity Save

19.3.7. Enter **Proposed Text** into the fields on the **Narrative Changes** tab. Click **Save**.

Budget Form Header
Comment History Comment Submit Configuration Close

Performance Measure Change Request (4400) was successfully updated.

Instance ID	Form Definition	Definition Name	Name	PCode:	Measure
Initial Entry	Museums and Historic Sites	Amount of earned revenue from			

Header Narrative Changes Attachments

Save

Current Methodology: 1. Data sources are collected by electronic ticketing systems where such systems exist; reported to divisions by ticketing vendors where agreements are in place for ticketing through vendors; and recorded manually and maintained in electronic databases in

Proposed Methodology:

Current Validity: 1. Data sources are valid as the electronic ticketing system count is based on electronic records for each ticket sold; the data reported from ticketing vendors is based on specific counts of tickets sold and associated revenues; and other reporting mech

Proposed Validity:

Current Reliability: Data sources are reliable as they are produced and monitored in electronic systems or by specific individuals designated by Division Directors, and such data correlates with admissions revenue data also monitored and reported along with attendance data.

Proposed Reliability:

Current Strategic Goal: Protect, preserve, interpret and manage New Mexico's cultural patrimony and programs for current and future generations

Proposed Strategic Goal:

Current Importance of Measure: • Maximize impact of programs and services
• Maintain and increase attendance levels to ticketed programs

Proposed Importance of Measure:

19.3.8. Click **Close**.

Budget Form Header

Performance Measure Change Request (4400) was successfully updated.

Instance ID	Form Definition	Definition Name	Name	PCode:
6205	4400	Performance Measure Change Request (4400)	Amount of earned revenue from ad	P536

Stage Code:* PCode: Measure:
Initial Entry Museums and Historic Sites Amount of earned revenue from

1. Data sources are collected by electronic ticketing systems.

19.3.9. The new Change Request appears in the list.

Sherpa Budget

Home Budget Formulation PCF Budget Execution Chart of Accounts Administration System Configuration Links

Performance Measure Change Request (4400)

Quick Search:

Record Actions:

Form ID	Description	Stage	Agency	Measure	Form Rows	Last Update	Last User	Submit	Actions
6204	Amount of earned revenue from admissions, rentals and other activity	4401	P536	50500P536008	0	3/2/2021	mljesse	<input type="button" value="Submit"/>	<input type="button" value="Header"/>
6205	Amount of earned revenue from admissions, rentals and other activity	4401	P536	50500P536008	0	3/3/2021	mkregor	<input type="button" value="Submit"/>	<input type="button" value="Header"/>
5675	Attendance to museum and historic site exhibitions, performances, films	4401	P536	50500P536001	0	2/18/2021	chuck.hulem@:	<input type="button" value="Submit"/>	<input type="button" value="Header"/>

19.3.10. Click Header if additional edits are required.

19.3.11. Once the Change Request is finished, submit the form following instructions from 8.14 [Submit Budget Form](#).

20. Personnel Cost Forecasting (PCF)

PCF is the BFM tool that calculates base salary and benefit information based on employee data loaded into the system. The PCF main navigation menu provides access to forms that allow for updates to personnel data in BFM. Note: BFM data is not used to update data in the human resources system. This is for budgeting purposes only.

Sherpa Budget

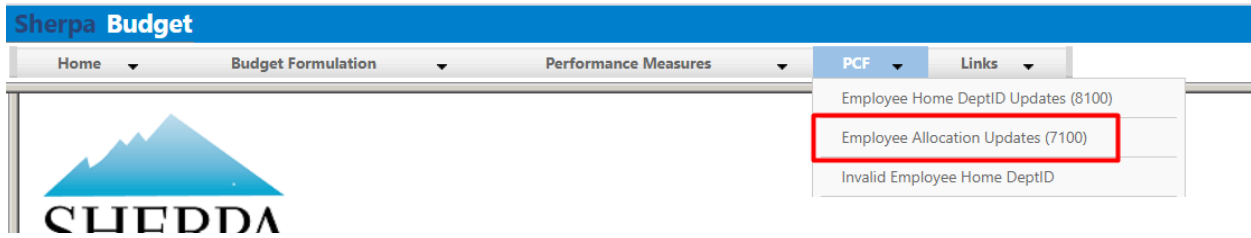
Home Budget Formulation Performance Measures Links

20.1. Employee Allocation Updates

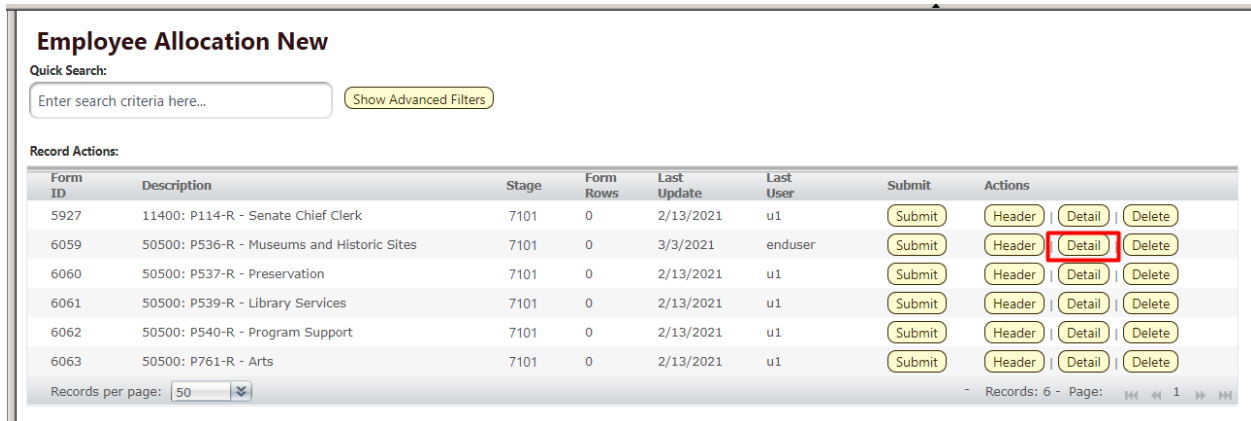
The Employee Allocation Updates 7100 form allows agencies to change employee allocations.

20.1.1. Navigate to the form by hovering over the **PCF** menu and clicking **Employee Allocation Updates**

(7100).



20.1.2. Click the **Detail** button for an available form on the main Employee Allocation form screen or "List Page." This page will return a form for each agency or program based on your security. If there are no agencies or programs assigned for your security role, this list will be blank. If you believe there is an error in the list available to you, then contact the BFM Administrator to update your security role.



20.1.3. The Employee Allocation Updates form will load.

Budget Form Lines

Close Export Import

ID	Form	Header Organization	Form Name
6059	7100	P536-R - Museums and Historic Sites	Employee Allocation New

Quick Search:

Actions:

ID	Row	Audit Trail	Position	Job Class	Employee No	Home DeptID-BU	Fund	DeptID-BU	Account	Fndg Start	Fndg End	Allocation Amount
631955	1		00004762	CLSS4012A		4502005000-50500	19301	4502005000-50500	520100	Jul 1 2019	Dec 31 2050	1.35
632018	2		10110112	CLSSX30000		4702000000-50500	19301	4702000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
632013	3		00073374	CLSSF3091A		4701000000-50500	19301	4701000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
632000	4		00004508	CLSS4012A		4604000000-50500	19301	4604000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
632181	5		00025546	CLSSX20000		4005000000-50500	19305	4005000000-50500	520200	Jul 1 2019	Dec 31 2050	1.00
631829	6		00070509	CLSSC11990		3004000000-50500	19301	3004000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
632001	7		00004503	CLSS4012A		4604000000-50500	19301	4604000000-50500	520100	Jul 1 2019	Dec 31 2050	0.50
631825	8		00058049	CLSS4021B		3003000000-50500	19301	3003000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
631849	9		00004574	CLSSJ1027S		4003000000-50500	19301	4003000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
631962	10		00030851	CLSSX30000		4502012000-50500	19301	4502012000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
631990	11		00023032	CLSSX40000		4601000000-50500	19301	4601000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
631830	12		00048085	CLSSX30000		3004000000-50500	19301	3004000000-50500	520100	Jul 1 2019	Dec 31 2050	0.75
631859	13		00004570	CLSS4013A		4004000000-50500	19301	4004000000-50500	520100	Jul 1 2019	Dec 31 2050	0.50
631949	14		00004559	CLSSV4199A		4403025000-50500	19301	4403025000-50500	520100	Jul 1 2019	Dec 31 2050	1.00
632105	15		00004884	CLSS40130		8006000000-50500	19301	8006000000-50500	520100	Jul 1 2019	Dec 31 2050	1.00

Records per page: 50 Records: 1 - 50 of 372 - Pages: 1

The second table contains the employee allocation data described in the table below.

Screen:	Employee Allocation Update 3900 Form Lines
Field (Column Name)	Description
ID	Read Only. Record ID.
Row	Read Only. Number indicating row count.
Audit Trail	Magnifying Glass button. Opens a window to display the audit trail records for the selected row.
Position	Read Only. Position Number
Job Class	Read Only. Job Class Code
Class Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Employee No	Read Only. Employee Number (redacted in screenshot)
Employee Full Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Home DeptID-BU	Read Only. Home Organization code for Employee
Fund	Read Only. Fund Code
Fund Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
DeptID-BU	Read Only. Department code for Employee
DeptID Name	Read Only. <i>This column is minimized, use double arrows to expand to see.</i>
Account	Read Only. Account number of employee.
Fndg Start	Read Only. Funding Start Date.
Fndg End	Read Only. Funding End Date.
Allocation Amount*	Data Entry Column. Enter updated allocation amount.
Pencil (edit) Icon	Edit icon. When clicked, the Line Detail screen will display to allow budget request entries. Double-clicking a row performs the same action.

20.1.4. Locate the record to be updated and double-click to edit. Use the Quick Search feature to narrow the record list.

This can also be accomplished through the Excel Export/Import spreadsheet. Detailed instructions are found in Section 8.4 [Excel Export/Import](#)

The screenshot shows a table with columns for ID, employee number, department, position, salary, and allocation. The second row (ID 631830) is highlighted in red, indicating it has been edited. At the bottom of the table, there are buttons for 'Save All' (highlighted with a red box) and 'Cancel All'. The status bar at the bottom indicates 'Records: 1 - 50 of 372 - Pages: 1'.

ID	Employee Number	Department	Position	Salary	Allocation
631990	11	00023032	CLSSX40000	4601000000-50500	1.00
631830	12	00048085	CLSSX30000	3004000000-50500	.75
631859	13	00004570	CLSSI4013A	4004000000-50500	1.00
631949	14	00004559	CLSSV4199A	4403025000-50500	1.00
632105	15	00004884	CLSSI4013O	8006000000-50500	1.00

20.1.5. Click **Save All** to update edited records. An edited record will appear in red text until it is saved. **Important: Save All before paging through records.** Data entered will be lost if you page through the records list before saving edits.

Important: Each Employee Allocations must equal 100% (1.0) for the form to be submitted to the next stage.

20.1.6. When Allocation updates are complete, click **Close**. Then **Submit** using the instructions from 8.14 [Submit Budget Form](#).

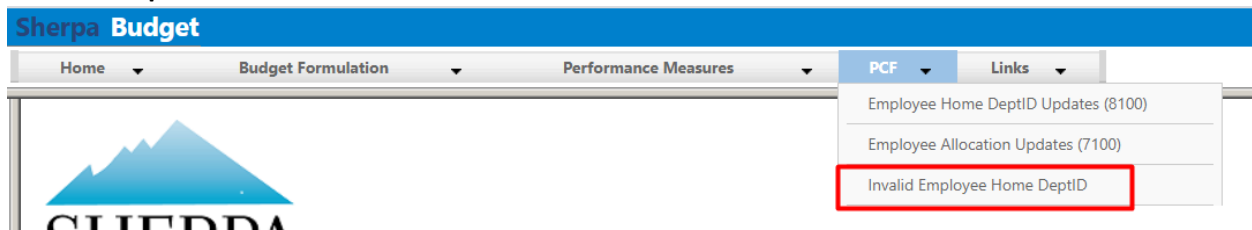
Note: Each Employee Allocations must equal 100% (1.0) for the form to be submitted to the next stage. If an employee allocation is greater than or less than 100% (1.0), then an error message will appear when attempting to submit the form, as shown below. If the error message appears, return to the form and correct the allocation amounts before attempting to submit the form again.

20.1. Invalid Employee Home Dept ID

The **Invalid Employee Home Dept ID** screen shows a listing of employee records that do not have a valid home organization assigned in the system. The list will only show employee records that are assigned to a user’s Business Unit (BU), based on system security. If an employee record has an invalid home organization in the system, then that record will not be included in any Personnel Cost Forecasting (PCF) calculations or on any other PCF screens.

The list on this screen can be exported to Excel for further analysis by the Department. Corrections to the employee record home organization should be made on the **Employee Home DeptID Updates (8100)** form.

20.1.1. Navigate to the screen by hovering over the **PCF** menu and clicking **Invalid Employee Home DeptID**.



20.1.2. Click **Export to XLSX**.

Invalid Employee Home DeptID

Quick Search:

Enter search criteria here... Show Advanced Filters

Actions:

Export to XLSX Export to XLSX (no Headers) Screen Configuration

Position No	Class Code	Class Name	Employee ID	Employee Name	Home DeptID - BU	BU
00000258	AOC9102JB	Judicial Specialist 2	Z00000258	VACANT	3010300000-23100	23100
00027434	AOC9102JB	Judicial Specialist 2	Z00027434	VACANT	3010300000-23100	23100
00054430	AOC9102JB	Judicial Specialist 2	Z00054430	VACANT	3010300000-23100	23100
00000259	AOC9104JB	Judicial Specialist Leadworker	Z00000259	VACANT	3010300000-23100	23100
00000156	AOC9104JB	Judicial Specialist Leadworker	Z00000156	VACANT	3070100000-23300	23300
00000170	AOC9102JB	Judicial Specialist 2	Z00000170	VACANT	3030200000-23500	23500
00037225	AOC9102JB	Judicial Specialist 2	Z00037225	VACANT	3060100000-23500	23500
00000189	AOC9841JB	Magistrate Judge	Z00000189	VACANT	3060100000-23500	23500
00043332	AOC9102JB	Judicial Specialist 2	Z00043332	VACANT	4040200000-23500	23500
00028023	AOC9102JB	Judicial Specialist 2	Z00028023	VACANT	3160100000-24100	24100
00054427	AOC9102JB	Judicial Specialist 2	Z00054427	VACANT	3160100000-24100	24100
00000246	AOC9205JB	Judicial Specialist Supervisor	Z00000246	VACANT	3160400000-24100	24100
00000136	AOC9102JB	Judicial Specialist 2	Z00000136	VACANT	3330300000-24100	24100
00054815	AOC9009JB	Court Manager 1	Z00054815	VACANT	3150100000-24200	24200

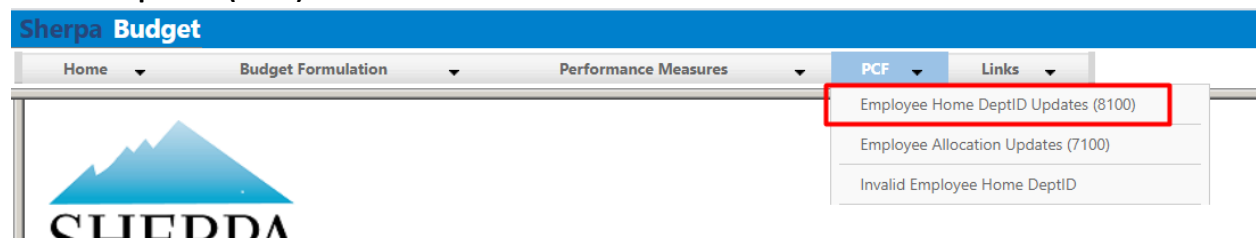
Records per page: 25 - Records: 87 - Page: 1

20.1.3. Proceed to [Employee Home DeptID Updates \(8100\) form](#) to correct invalid home orgs in the system.

20.2. Employee Home DeptID Updates

The Employee Home DeptID Updates (8100) form allows users to correct employee records in the system that have an invalid Home Dept ID assigned in BFM. If an employee record has an invalid home organization in the system, then that record will not be included in any Personnel Cost Forecasting (PCF) calculations or on any other PCF screens.

20.2.1. Navigate to the screen by hovering over the **PCF** menu and clicking **Employee Home DeptID Updates (8100)**.



20.2.2. Select an available form from the main form screen or "List Page" and click **Header**. This page will only return forms for Business Units that have an employee record with an invalid ID assigned. If there are no forms, then the Business Units assigned to your user account do not contain any employee records that have invalid Home DeptIDs assigned.

Sherpa Budget

Home Budget Formulation Performance Measures PCF Budget Execution Chart of Accounts Administration System Configuration Links

Employee Home DeptID Update

Quick Search: [Show Advanced Filters](#)

Record Actions: [Add New](#) [Create Budget Forms](#) [Screen Configuration](#) [Action Configuration](#)

Form ID	Description	Stage	Form Rows	Last Update	Last User	Submit	Actions
7015	21600: Supreme Court	8101	0	3/30/2021	u1	Submit	Header Detail Delete
7016	23100: First Judicial District Court	8101	0	3/30/2021	u1	Submit	Header Detail Delete
7017	23300: Third Judicial District Court	8101	0	3/30/2021	u1	Submit	Header Detail Delete
7018	23500: Fifth Judicial District Court	8101	0	3/30/2021	u1	Submit	Header Detail Delete
7019	24100: Eleventh Judicial District Court	8101	0	3/30/2021	u1	Submit	Header Detail Delete
7020	24200: Twelfth Judicial District Court	8101	0	3/30/2021	u1	Submit	Header Detail Delete
7021	24300: Thirteenth Judicial District Court	8101	0	3/30/2021	u1	Submit	Header Detail Delete
7022	28000: Law Offices of the Public Defender	8101	0	3/30/2021	u1	Submit	Header Detail Delete

20.2.3. Click the **Invalid Home Orgs** tab.

Budget Form Header

[Comment History](#) [Comment](#) [Submit](#) [Configuration](#) [Close](#)

Instance ID	Form Definition	Definition Name	Name
7020	8100	Employee Home DeptID Update	24200: Twelfth Judicial District Cou

Stage Code:* PCode:
 Initial Entry Twelfth Judicial District Court

Header **Invalid Home Orgs** Employees Updated Attachments

Name: [Save](#)

20.2.4. The listing of employee records with invalid home organizations will appear. Click **Export**. For step-by-step Export instructions, see Section 8.4 [Excel Export/Import](#).

Budget Form Lines

ID	Form	Header Organization	Form Name
7020	8100	24200 - Twelfth Judicial District Court	Employee Home DeptID Up

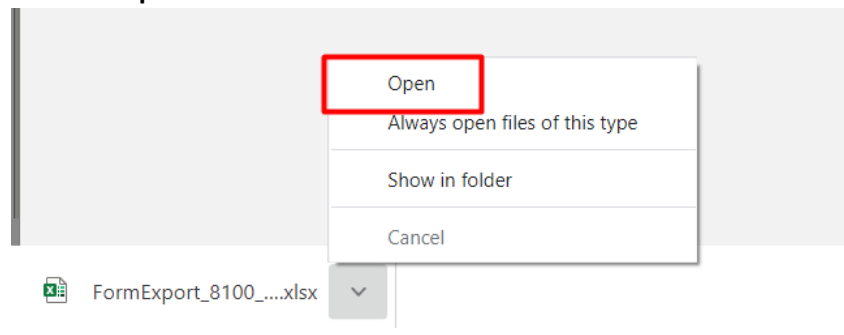
Quick Search:

Actions:

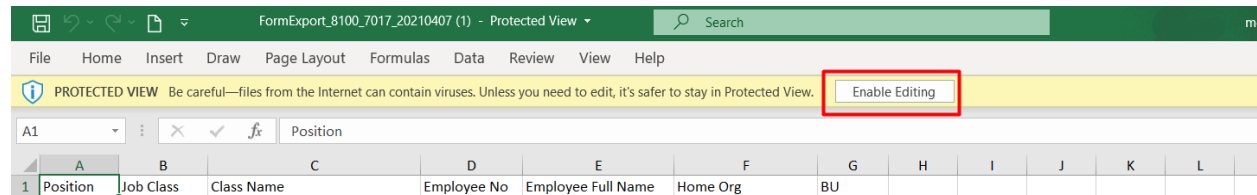
Row	Audit Trail	Position	Job Class	Class Name	Employee No	BU	Home Org
1		00054815	AOC9009JB	Court Manager 1	Z00054815	24200	3150100000-24200

Records per page: Records: 1 - 1 of 1 - Pages: 1

20.2.5. Locate the downloaded file in your browser’s bottom toolbar. Right-click the arrow and select **Open**.



20.2.6. Click **Enable Editing** and **Save** the file.



20.2.7. Update the Home Org(s) listed in **Column F** and **Save** the spreadsheet.

	A	B	C	D	E	F	G
1	Position	Job Class	Class Name	Employee No	Employee Full Name	Home Org	BU
2	00000156	AOC9104JB	Judicial Specialist Leadworker	Z00000156	VACANT	1700000000-23300	23300
3							
4							

20.2.8. Return to BFM Form 8100 and click **Import**.

Budget Form Lines

ID	Form	Header Organization	Form Name
7020	8100	24200 - Twelfth Judicial District Court	Employee Home DeptID Up

Quick Search:

Actions:

Row	Audit Trail	Position	Job Class	Class Name	Employee No	BU	Home Org
1		00054815	AOC9009JB	Court Manager 1	Z00054815	24200	315010000-24200

Records per page: 50
 Records: 1 - 1 of 1 - Pages: <<< << 1 >>> >>>

20.2.9. Click **Browse** and select the correct file. Click **Load Selected File**.

For detailed import instructions see Section 8.6 [Import Spreadsheet](#).

Budget Form Import

C:\fakepath\FormExport_8100_7020_20210407-forupload.xlsx

20.2.10. The system will validate the Home DeptID when the Excel spreadsheet is uploaded. If the

DeptIDs area valid, then the upload will complete. Click **Close**.

If any DeptIDs are invalid, the rows with invalid DeptIDs will not load. Review the spreadsheet and correct the DeptIDs, before trying to upload the spreadsheet again.

Budget Form Import

Close **Validation Results**

Browse

C:\fakepath\FormExport_8100_7020_20210407-forupload.xlsx

Load Selected File

Upload Completed:

- 1 - Records Read
- 0 - Severe Errors
- 0 - Warning Errors
- 1 - Records Uploaded

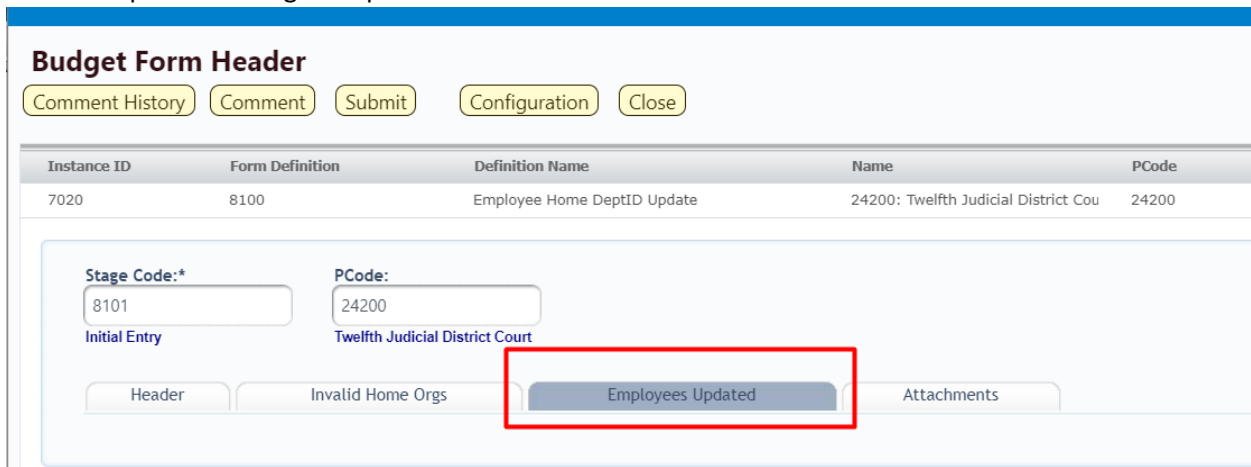
3240

Position	Job Class	Class Name	Employee No	Employee Full Name	Home Org	BU
00054815	AOC9009JB	Court Manager 1	Z00054815	VACANT	1260100000-24200	24200

20.2.11. Employee Records that have been updated with valid DeptIDs will no longer appear in the list. Click **Close** to return to the form Header screen.



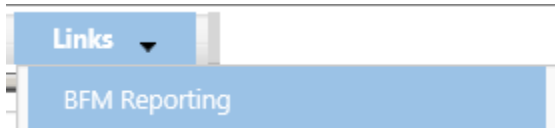
20.2.12. On the Header tab, click the Employees Updated tab to see the list of employee records updated during the upload.



21. BFM Reporting

21.1. How to Access BFM Reports

- **Access through BFM Links:** Log in to BFM and click on the Links dropdown / BFM Reporting



21.2. Multiple Sessions

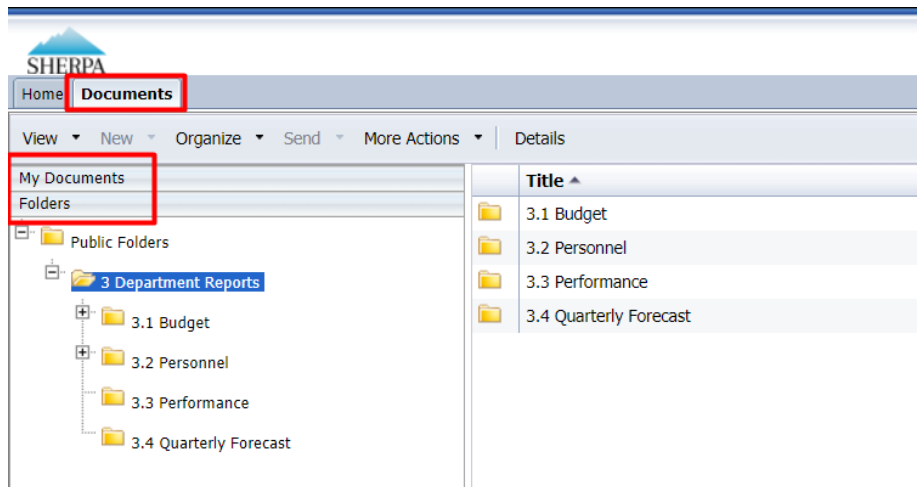
BFM Reporting will open in a new tab. Drag the new tab to create a new instance of your browser. This will allow you to have reports open in one tab and the BFM application open in another window. You can enter data in BFM and refresh reports. This is especially useful if you have two monitors.

21.3. Logging In

Single-sign on is used to log onto BI Launch Pad, there is no second login.

22. Run Reports

22.1. Basic Navigation

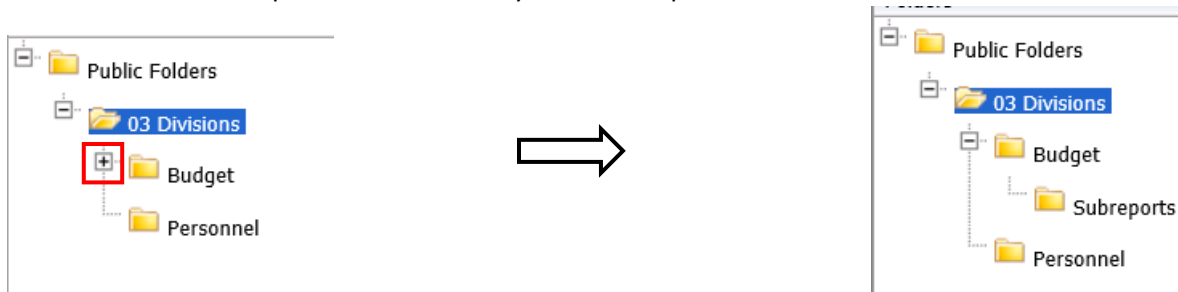


22.1.1. There are two tabs in the upper left, **Home** and **Documents**. Click on **Documents** to see the report folders.

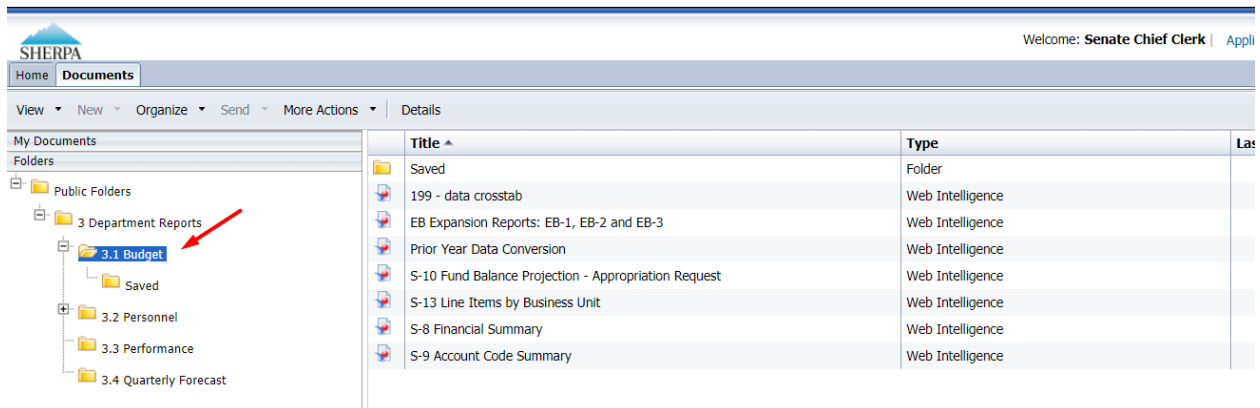
22.1.2. There are sliders on the left-hand panel that are a bit tricky to use. The first is **My Documents**, where any personal documents may be saved, but this is not heavily used.

22.1.3. **Folders** is where all standard reports are housed. The active slider is above the white space; in this screen shot Folders is Active. If My Documents is Active, Folders is all the way at the bottom of the screen. When you click on **Folders** it will slide to the top and open the **Folders** section.

22.1.4. Click on the plus to the left of any folder to expand the folder structure.



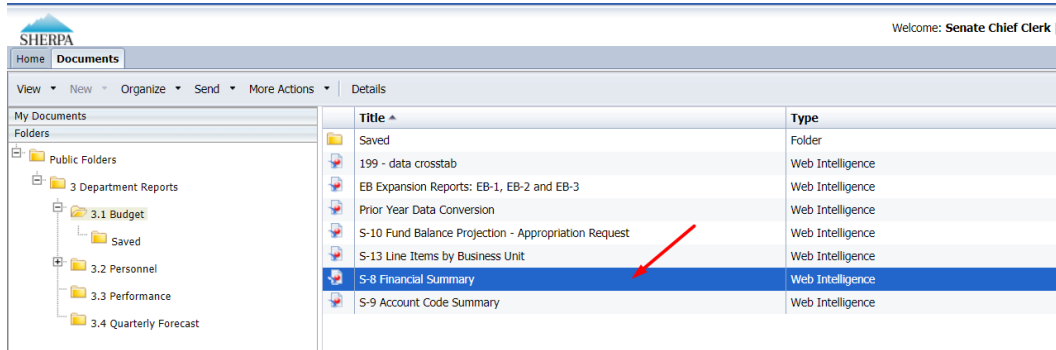
22.1.5. Click on any folder see the reports available.



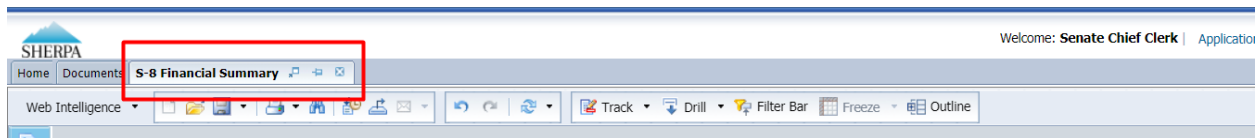
22.2. Open a Report

22.2.1. Navigate through the folders to the report to be run.

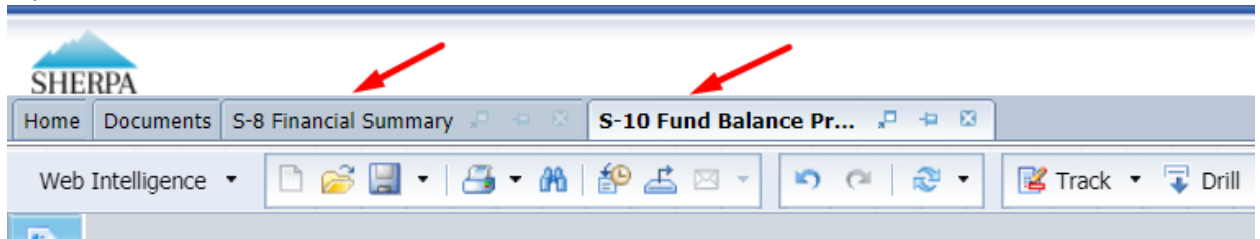
22.2.2. **Double click** on the report to be opened.



When the report is open, the report header will display as a tab along with the Home and Documents tabs:



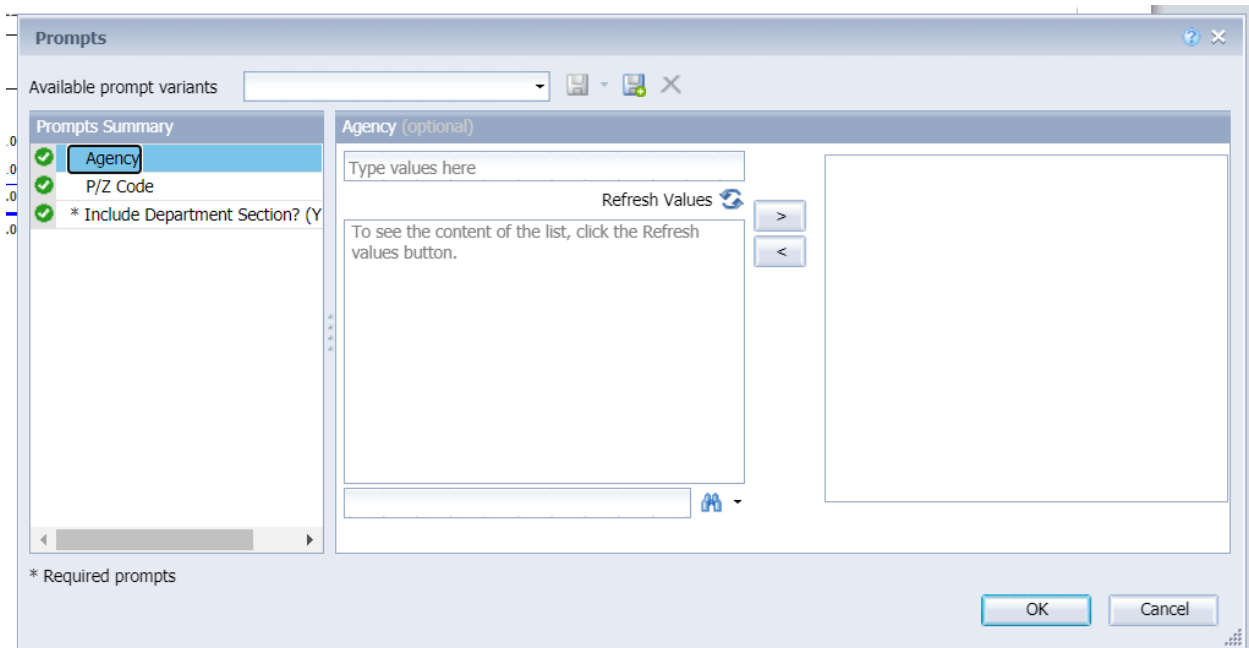
More than one report can be open in the same session. Each report will appear as an additional tab to the right of existing tabs. To open additional reports, click the Documents tab to return to the available reports.



Most reports will be set to 'auto refresh', meaning the report will refresh the data after you open it. All end user reports have prompts (see Report Prompts below) that must be completed.

22.3. Report Prompts


The prompt screen will display with default values selected when a report is opened or when a report is refreshed. In the Prompts Summary area there may be multiple prompts that appear.

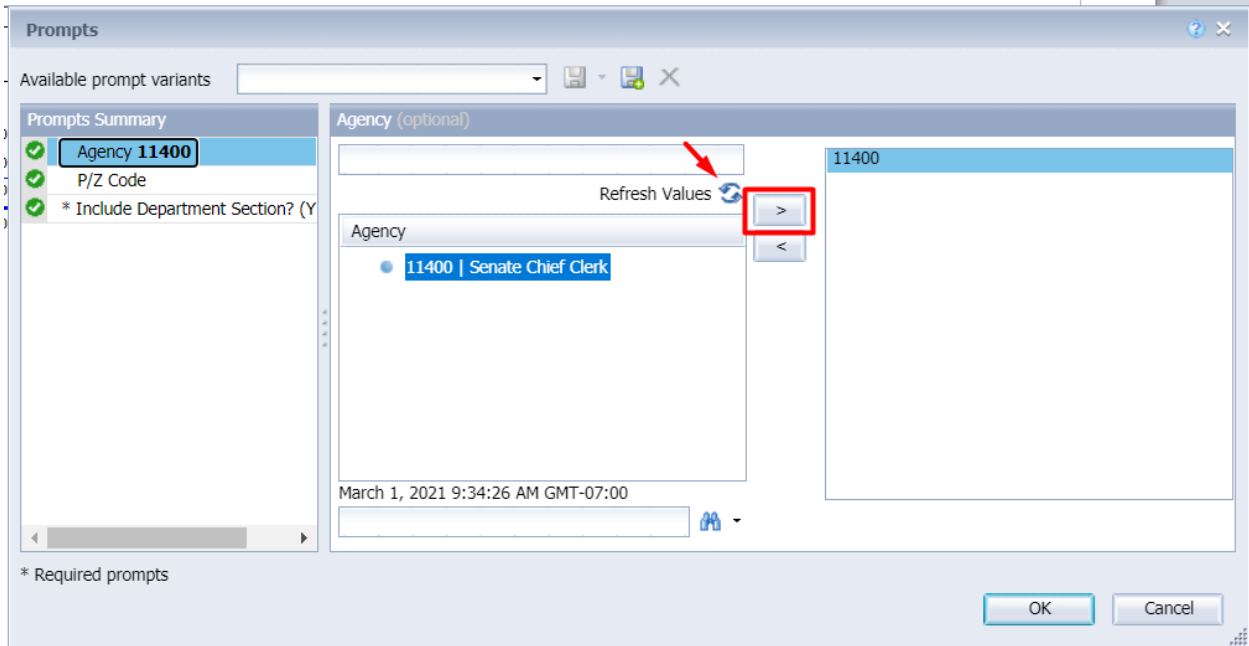



- You must click on each Prompt you wish to fill out (or is required) and follow the procedures below to complete them.
- The active Prompt (Agency) is highlighted in Blue; there are three prompts in the screenshot above (Agency, P/Z Code, *Include Department Section? Y/N)
- Optional prompts have a green circle with a checkmark when the prompt is empty.
- Required prompts have a red circle with a "x" when the prompt is empty.
- Depending on the report that is opened, all prompts (listed below) may not be available. Each report may have different prompts.

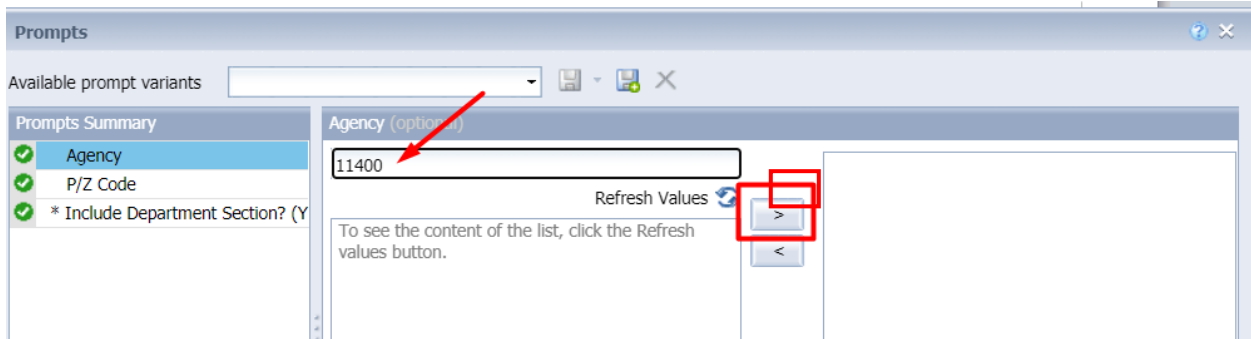
22.3.1. To change the default prompt value there are three options:

- Selecting a value from a list
- Entering a value
- Searching for a value

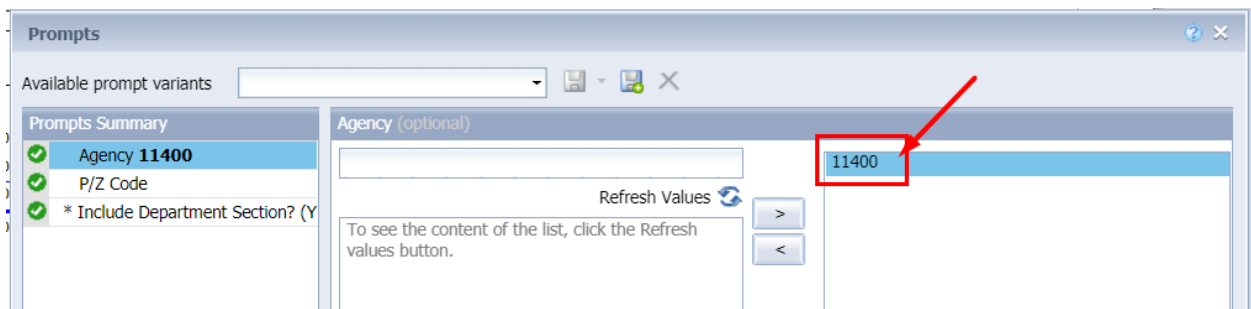
22.3.2. To select a **value from a list**, click the **Refresh Values**  button. All of the valid prompt values will display in the box below. Highlight the value you wish to select and **Double click** or click the right arrow. For a LIST type prompt, you can repeat this and select multiple codes. You can also CTRL+Click to select multiples at one time.




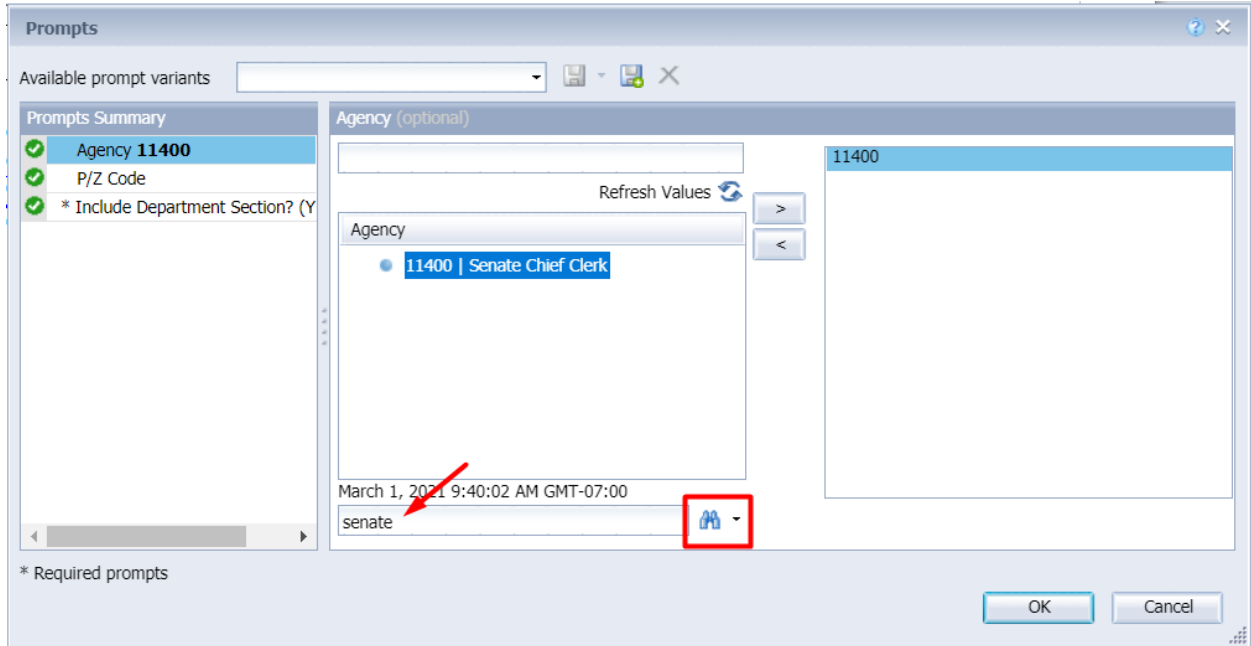
22.3.3. To **enter a value**, type the value into the "Type values here" box, then click the **right arrow** . This adds the selection to the report without using the Refresh Values list shown above.



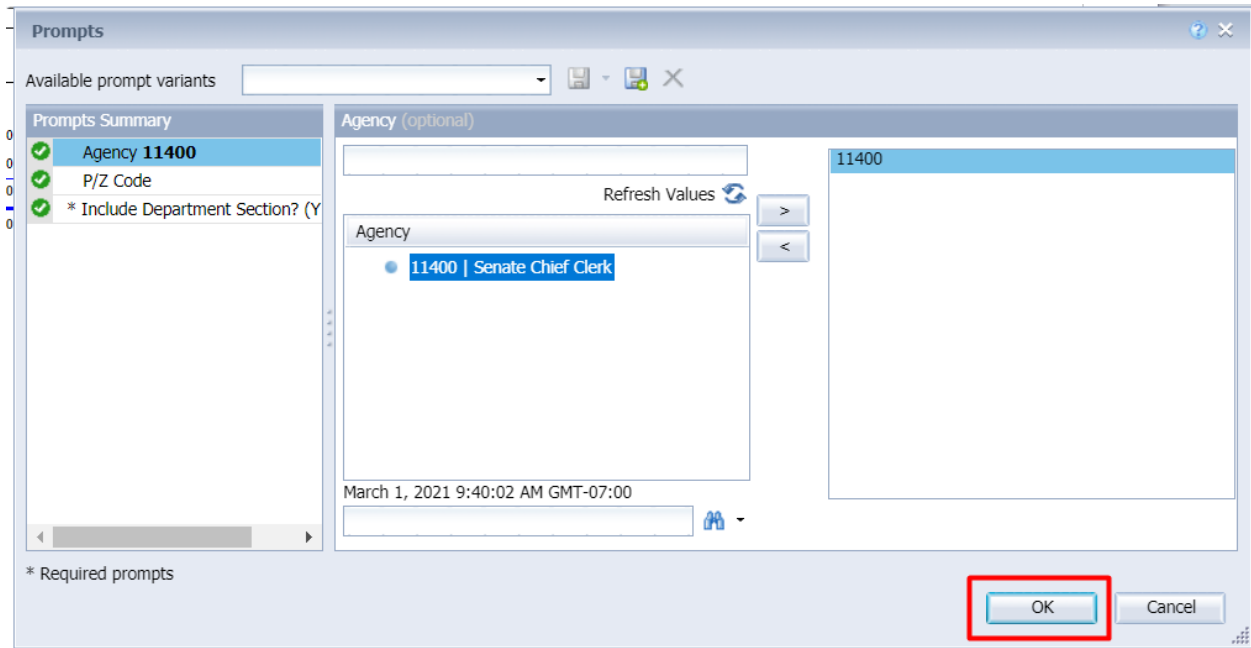
After clicking the **right arrow**, the default prompt value (if there is one) is replaced:



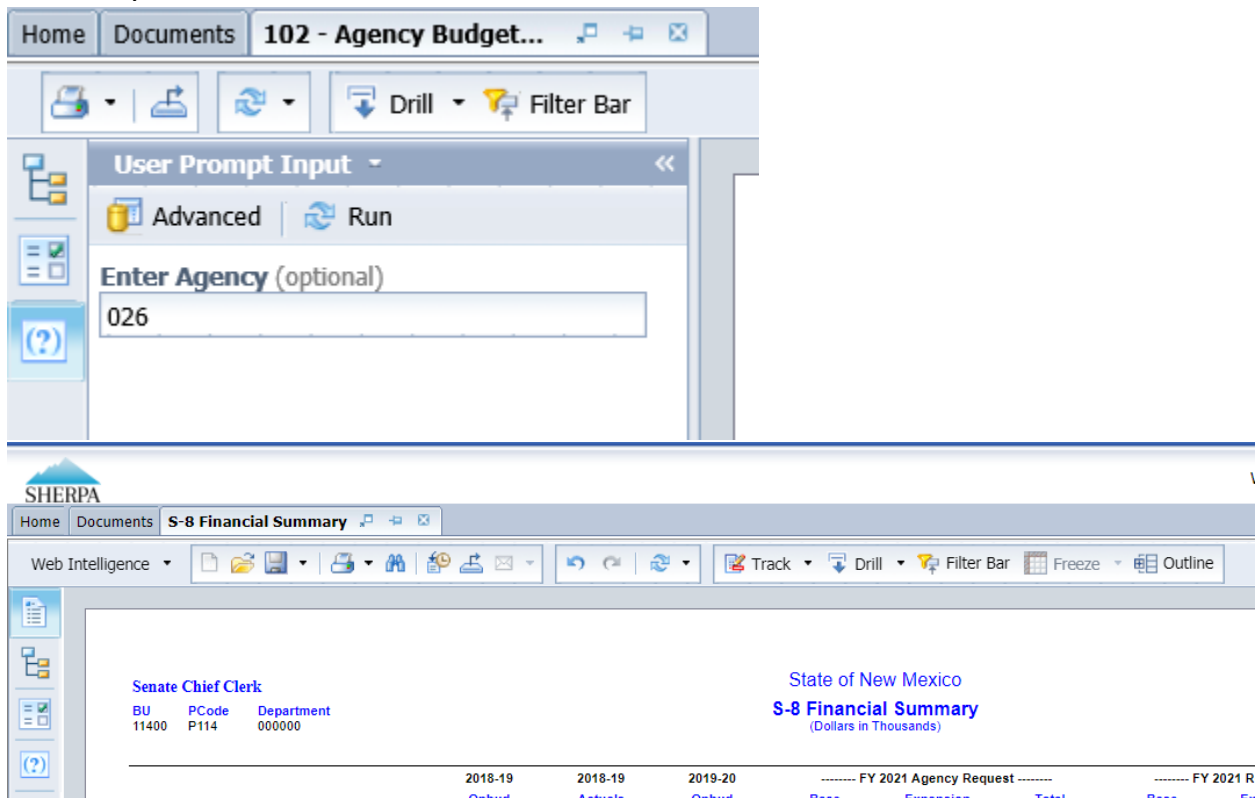
22.3.4. In many cases the lists are long. To search for a value, type the value in the field to the left of the **binoculars** , then click the **binoculars**. Partial values can be entered and all values that contain that partial value will be searched. Then **double click** the value to be used for the prompt.










22.3.5. Once all prompt values have been selected, click the **OK** button. The report will run. If **OK** is NOT highlighted (it appears light gray), this means a required prompt has not been completed.





22.4. Report Icons




Toolbar Actions

-  Save current report, click down arrow for Save As option.
-  Print current report (tab) or all reports (all tabs).
-  Export current report (tab) or all reports (all tabs) into a PDF or Excel.
-  Refresh data by rerunning using the prompt window.
-  Enables the drill capability in the report.
-  Displays the filter bar at the top of the report. Objects can be added to the filter bar to restrict what is displayed in the report.
-  Folder opens a new report in place of the existing report.

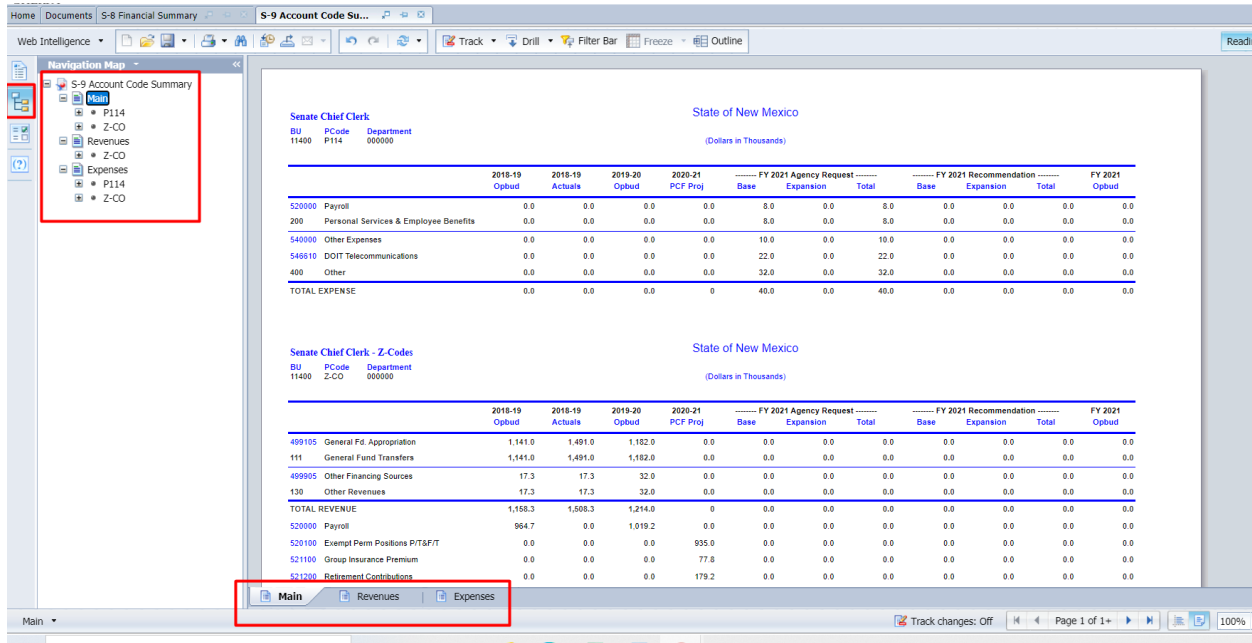
Side Panel Actions

-  Displays the Navigation Map which includes all report tabs and any sections added to report navigation.
-  Displays the Input Control options. Input controls are used to determine what data is displayed in the report.

 Displays the User Prompt Input options.

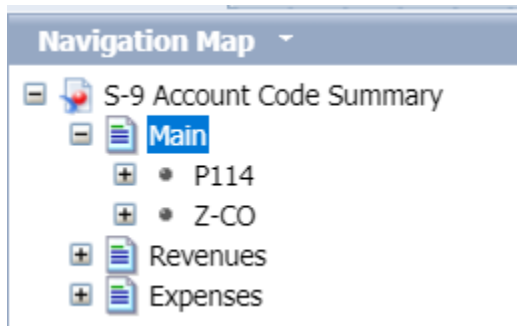
22.5. Report Navigation – Document Tabs

Different views of the same data can be captured in report tabs. First, click on the “Navigation Map” button on far left side. The Navigation Map will appear. There are two ways to move between tabs within a report: the Navigation Map or the Tab Strip.



Navigation Map

22.5.1. To display the tab, click on the tab in the Navigation Map. The tab currently displayed is highlighted.



22.5.2. If a tab has a plus sign, report sections have been added to the navigation map.

22.5.3. Clicking on the sub-tab navigation item will display that specific section in the report.

Tab Strip

22.5.4. To display the tab, click on the tab in the Tab Strip. The tab displayed currently is highlighted.

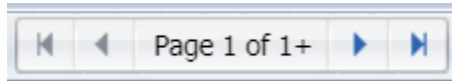
	2018-19 Opbud	2018-19 Actuals	2019-20 Opbud	2020-21 PCF Proj	----- FY 2021 Ager Base	Expar
499105 General Fd. Appropriation	1,141.0	1,491.0	1,182.0	0	0.0	
111 General Fund Transfers	1,141.0	1,491.0	1,182.0	0	0.0	
499905 Other Financing Sources	17.3	17.3	32.0	0	0.0	
130 Other Revenues	17.3	17.3	32.0	0	0.0	
TOTAL REVENUE	1,158.3	1,508.3	1,214.0	0	0.0	

Paging

To move between pages of a report, click the arrows or enter a page number.

	11.0	11.0	32.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
499905 Other Financing Sources	17.3	17.3	32.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
130 Other Revenues	17.3	17.3	32.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
TOTAL REVENUE	1,158.3	1,508.3	1,214.0	0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520000 Payroll	964.7	0.0	1,019.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
520100 Exempt Perm Positions P/T&T	0.0	0.0	0.0	935.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521100 Group Insurance Premium	0.0	0.0	0.0	77.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0
521200 Retirement Contributions	0.0	0.0	0.0	179.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0

22.5.5. To advance pages, click the **inner arrows** to move one page at a time and the **outer arrows** to move to either the first or last page.



22.5.6. To select a specific page, click on the **Page 1 of 1** to enter a page number and then click **Enter**.

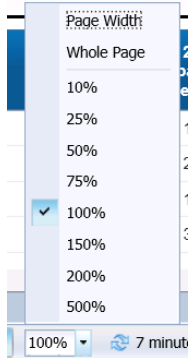


Zoom

22.5.7. To change the viewable portion of a report, change the zoom percentage on the bottom tool bar.



Zoom options include:

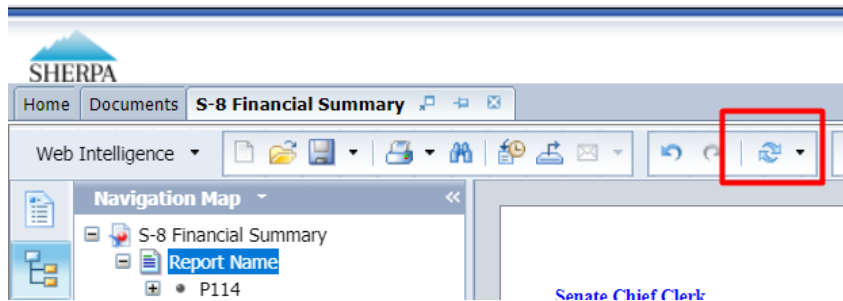


22.6. Refresh a Report While Open

Once a report is opened, the values in the report can be updated by refreshing the report.

Refresh with Prompts

22.6.1. Click the Refresh button in the tool bar under the report name:

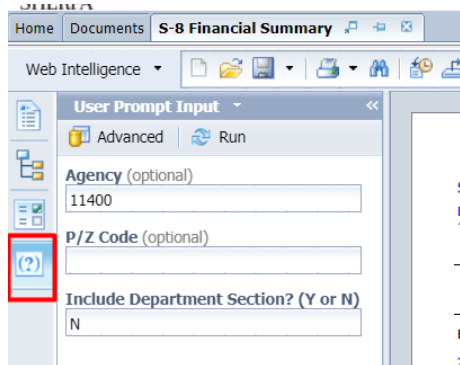


22.6.2. The prompt screen reappears. Complete the report prompts as described in Section 22.3 [Report Prompts](#).

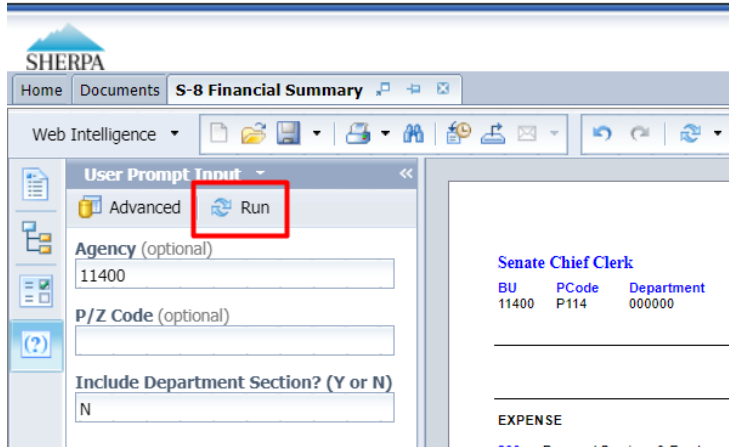
Refresh From User Prompt Input

In the upper left, the Navigation Map/Document Summary drop down contains an option for User Prompt Input. Selecting this allows you to change values by simply typing in new values and clicking Run. There is a slight time savings to using this method if constantly refreshing the report.

22.6.3. Select User Prompt Input



22.6.4. Type in the Organization or other values in the prompt areas. There are no values from which to choose, so you must type in a valid entry.

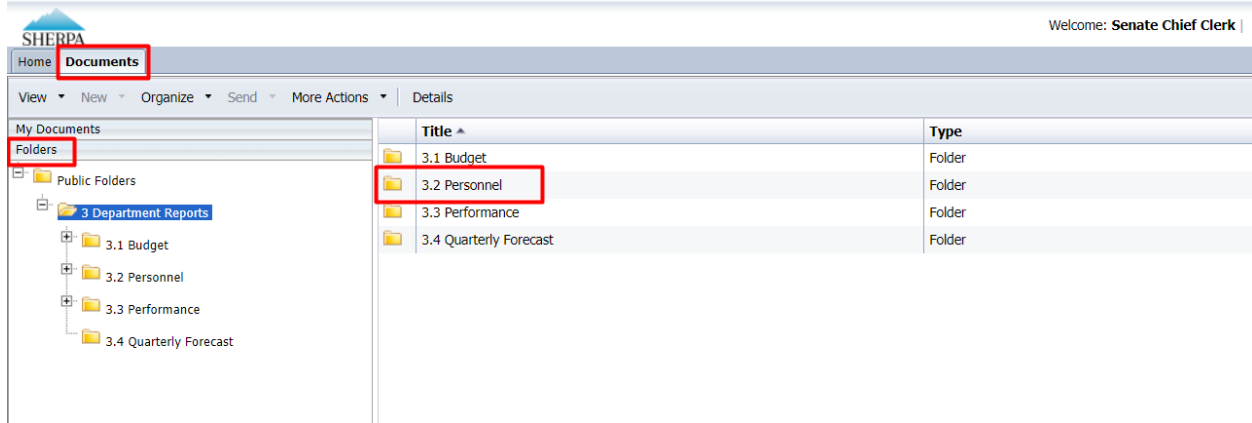


22.6.5. Click **Run**. The report will be refreshed with the data for the values you entered.

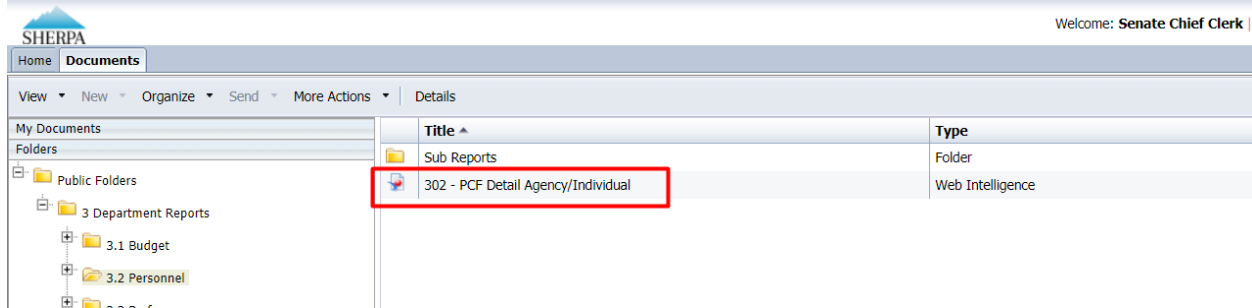
22.7. Drill Through on Personnel Report

Drilling displays the data at different levels of summarization. Drill Through is available on a Personnel Cost Forecasting (PCF) report.

22.7.1. From the Documents Folder, navigate to the **3.2 Personnel** folder. Double click to open.



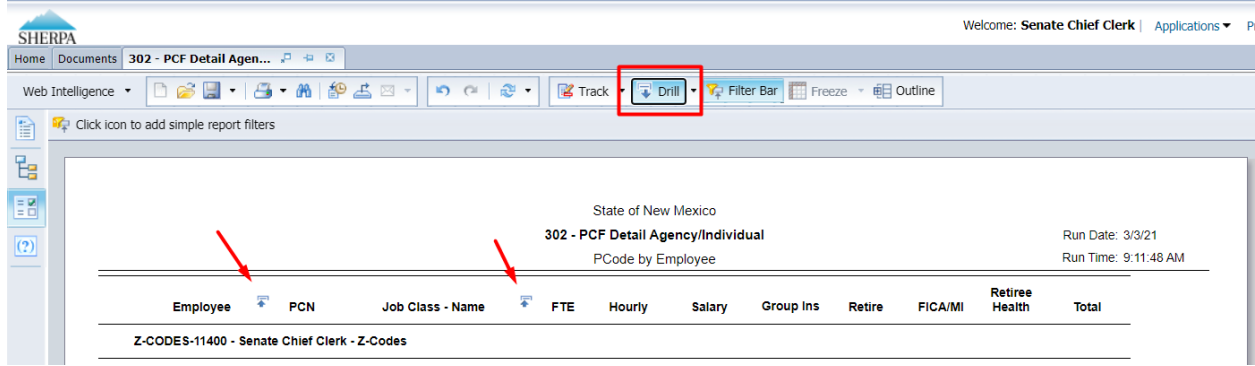
22.7.2. Locate the **302 – PCF Detail Agency/Individual** report. Double click to open.



22.7.3. Complete the Prompt using the instructions in 22.3 [Report Prompts](#), or leave blank and click **OK**.

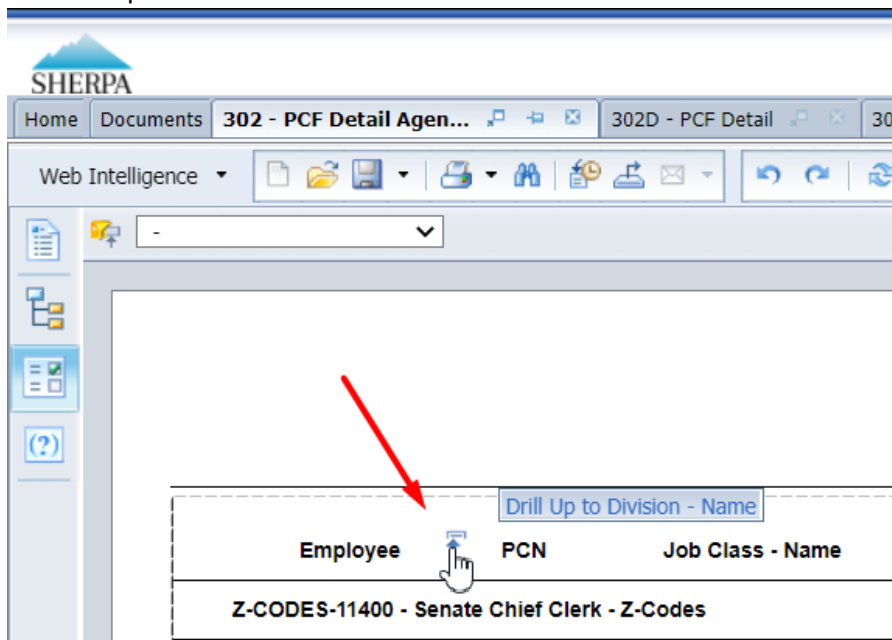
22.7.4. The report will load. Click on the **Drill** icon to enable the drill functionality. The drill up icon appears in the report column header where drilling is available.

If the arrow points up, the report will allow drilling up to a higher level; if the arrow points down, the report will drill to a lower level of data. In this example, the data drills up to a higher level.



Option 1:

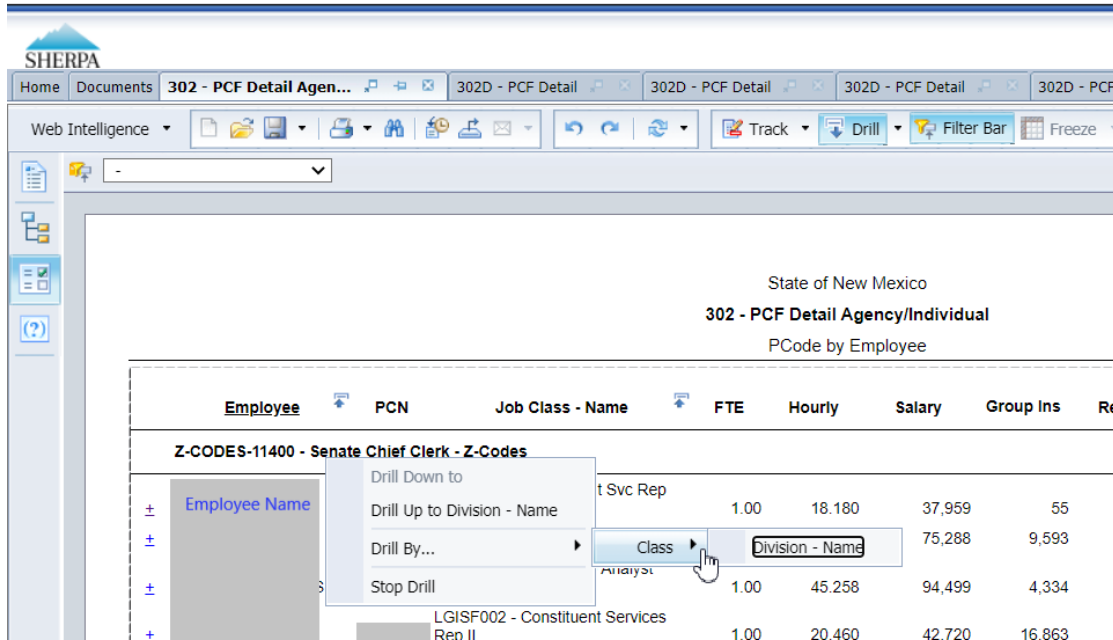
22.7.5. Left-click on any column header/field that has a drill icon. It will automatically drill to the next pre-defined level.



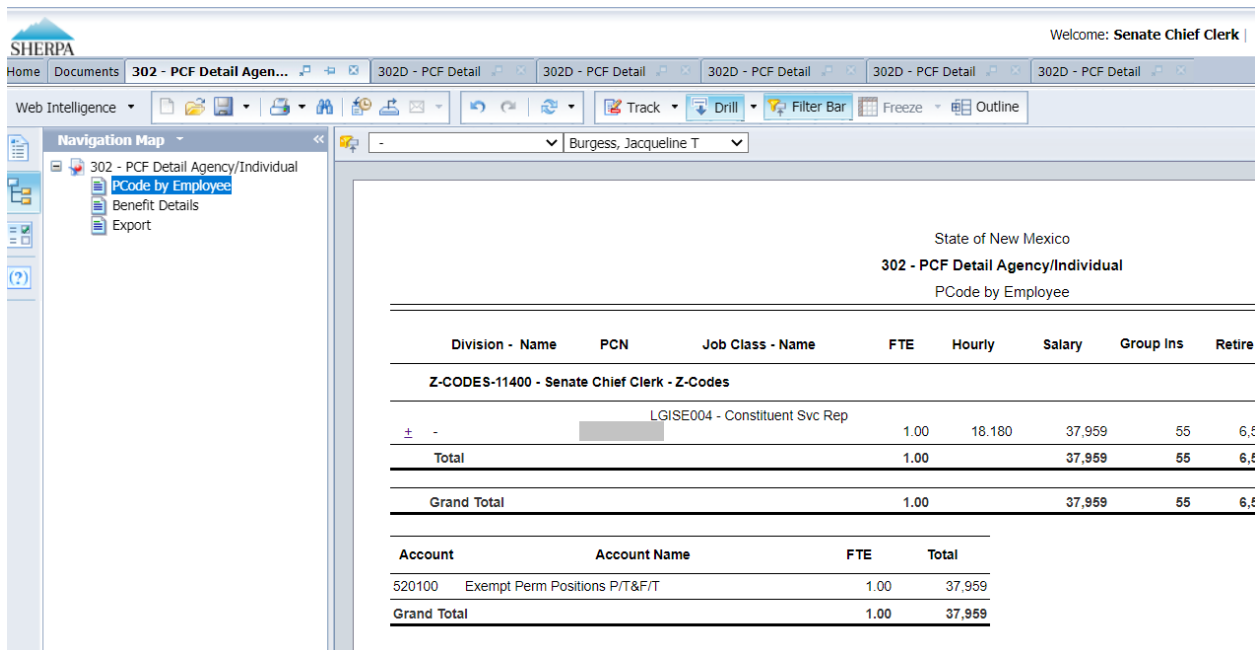
Option 2:

22.7.6. Right-click on the row you want to drill on and choose **Drill By**.

Note: The 302 Report shows employee listed by name, but in the screenshot below the employee names are redacted.



22.7.7. Select the drill dimension, the report will show the data at that level. The report at the new level will load.

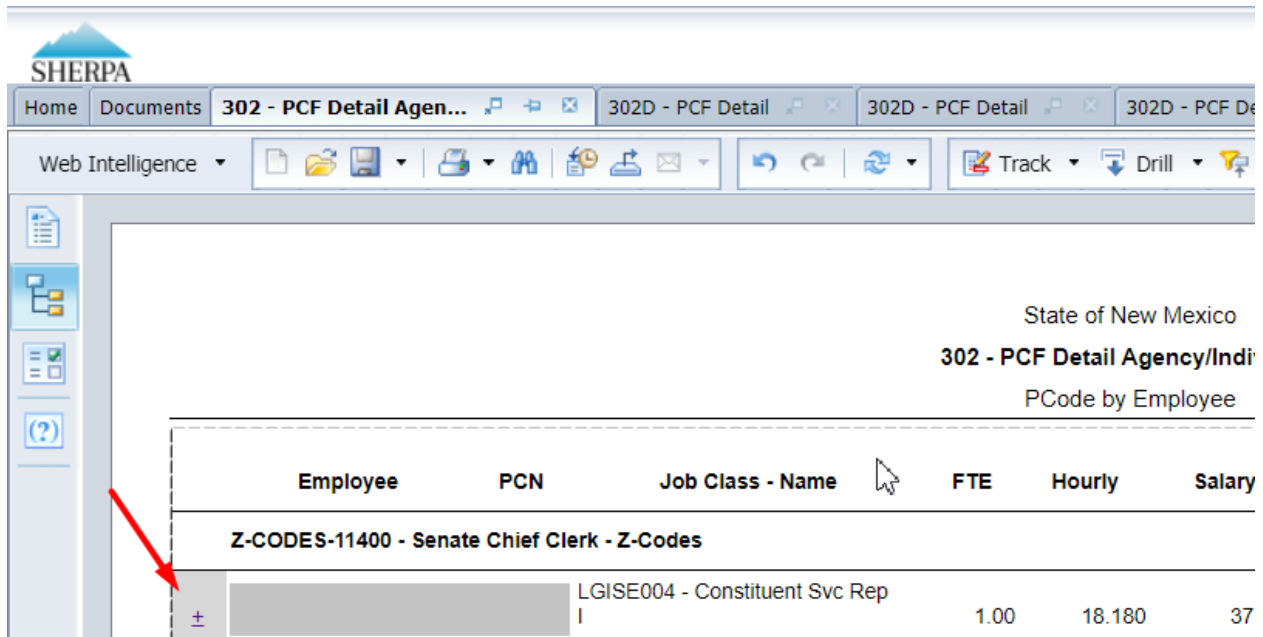


Linked Report

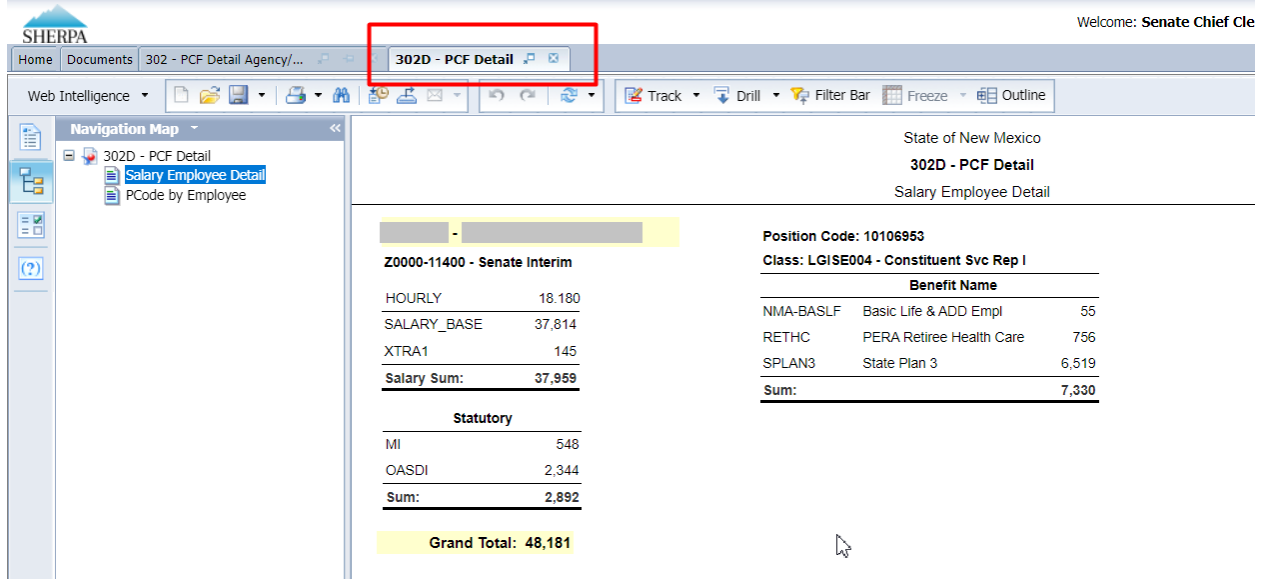
The 302 PCF Detail Report is also a linked report, meaning a separate report related to the same dataset can be opened by clicking a hyperlink available in the report.

22.7.8. Click the plus-sign hyperlink next to the employee name to open the PCF Detail for the

employee.



22.7.9. The detail report opens in a new tab.



22.8. Limit Data Using Input Controls

Input Controls limit data displayed in the report after refreshing. Input Controls are available on the S-8 Financial Summary report.

22.8.1. Click on the **Input Control** icon to display the input control options.

State of New Mexico
Senate Chief Clerk
S-8 Financial Summary
(Dollars in Thousands)

	2018-19 Opbud	2018-19 Actuals	2019-20 Opbud	2020-21 PCF Proj	FY 2021 Agency Request		Total
					Base	Expansion	
EXPENSE							
200 Personal Services & Employee Benefits	0.0	0.0	0.0	0.0	8.0	0.0	8.0
400 Other	0.0	0.0	0.0	0.0	32.0	0.0	32.0
EXPENDITURES	0.0	0.0	0.0	0	40.0	0.0	40.0
EXPENSE	0.0	0.0	0.0	0	40.0	0.0	40.0

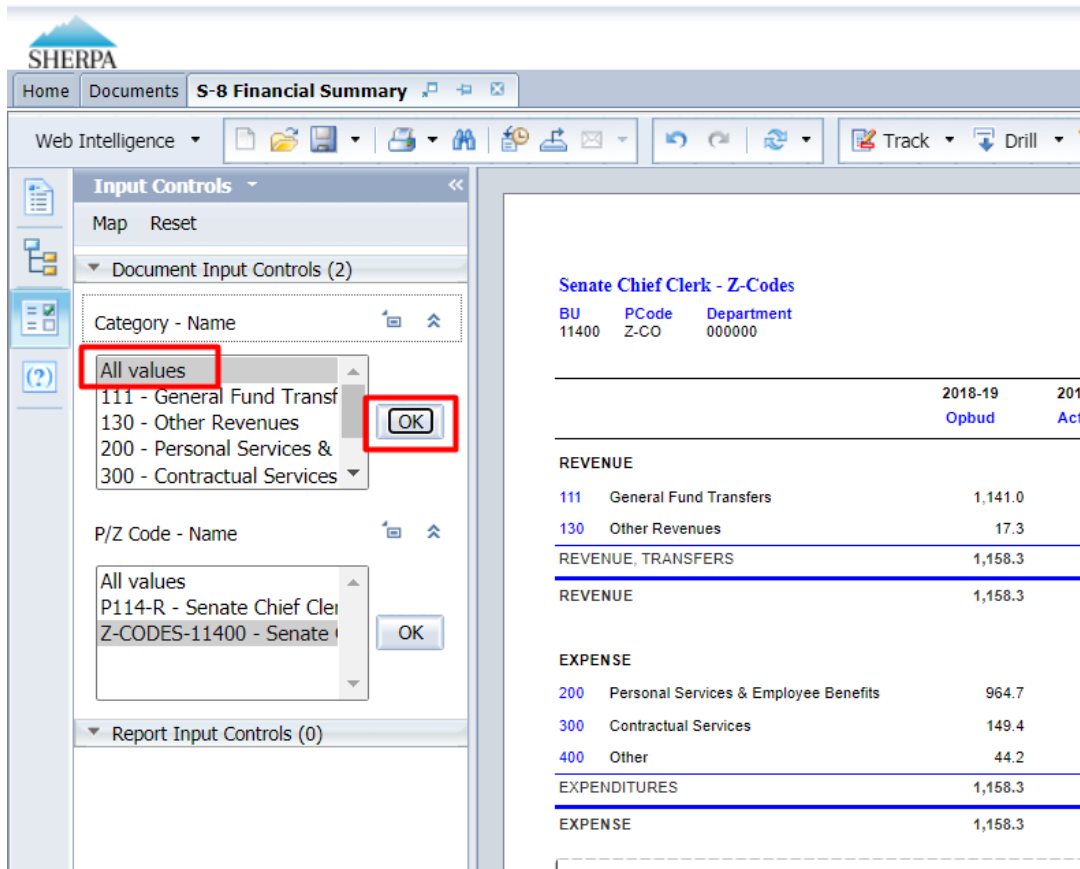
22.8.2. Select one or many values from the input control panel on the left-hand side of the screen. Hold down the Ctrl key to select multiple values with your cursor.

22.8.3. Click **OK**.

State of New Mexico
Senate Chief Clerk - Z-Codes
S-8 Financial Summary
(Dollars in Thousands)

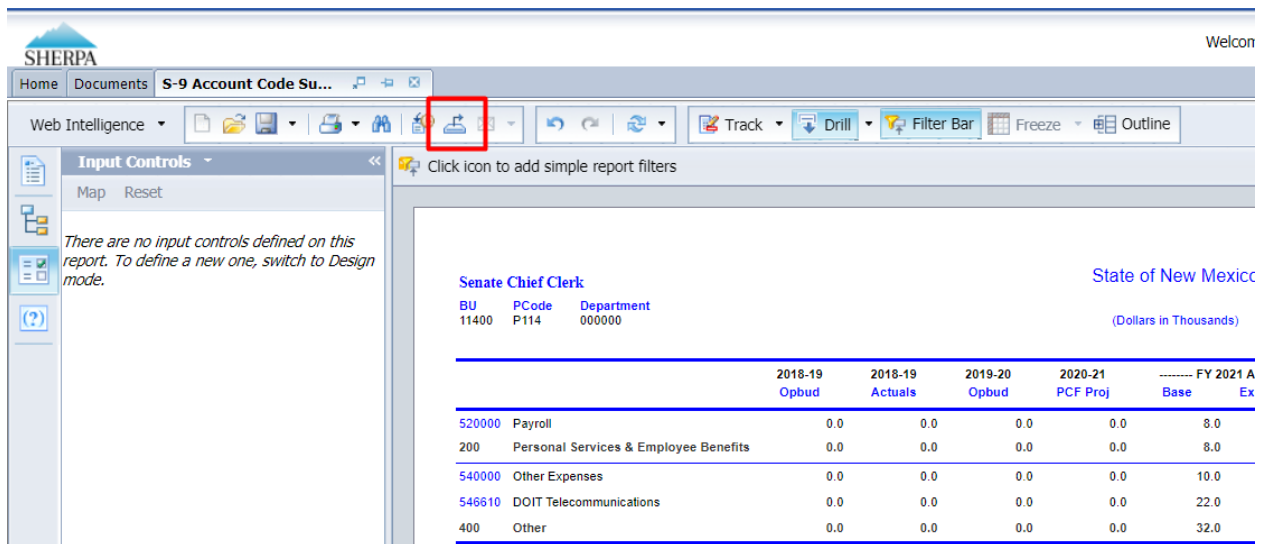
	2018-19 Opbud	2018-19 Actuals	2019-20 Opbud
REVENUE			
130 Other Revenues	17.3	17.3	3
REVENUE, TRANSFERS	17.3	17.3	3
REVENUE	17.3	17.3	3

22.8.4. Select "All values" and click **OK** to return to the complete data set.

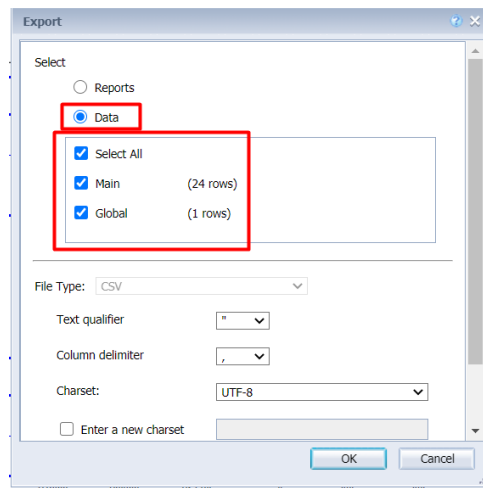
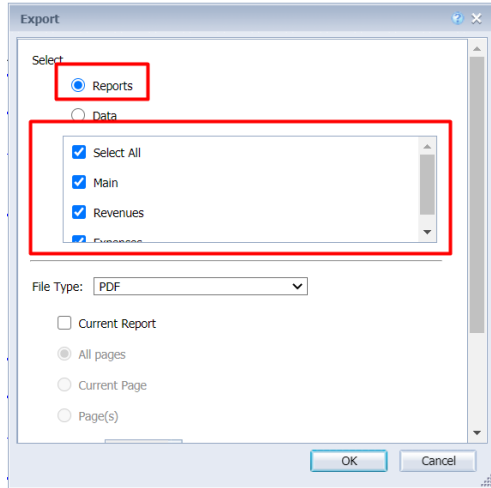


22.9. Export a Report

Options to export include all report tabs or data as PDF, Excel, CSV, or Text. The Export icon on the upper tool bar provides an Export popup.



22.9.1. Select **Report** or **Data**. Report allows a selection of one, multiple, or all report tabs. Data allows a selection of queries defined for the report.



22.9.2. Select **File Type**. Each file type has additional export options.

22.9.3. Click **OK**.

22.9.4. Once the report downloads, click prompt to open.

The screenshot shows the SHERPA application interface. The main window displays a financial report for the Senate Chief Clerk, State of New Mexico. The report includes columns for 2018-19 Optbud, 2018-19 Actuals, 2019-20 Optbud, 2020-21 PCF Proj, FY 2021 Agency Request (Base, Expansion, Total), FY 2021 Recommendation (Base, Expansion, Total), and FY 2021 Optbud. The report shows various expense categories like Payroll, Personal Services & Employee Benefits, and Other Expenses. Below the main report, there is a section for 'Senate Chief Clerk - Z-Codes' with similar columns. At the bottom of the browser window, a file download bar shows 'S-9_Account_Code...pdf' with a red box around it.

Saving as Excel

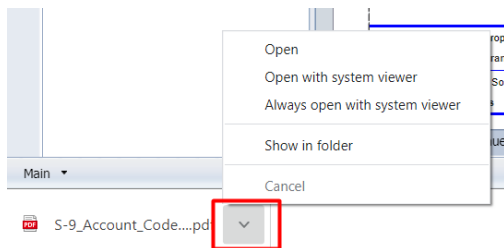
Double click the file in the bottom bar of the Browser window to Open. Click **Enable Editing**, then save the report as desired.

- The Excel files will not include the report headers.

	2018-19 Opbud	2018-19 Actuals	2019-20 Opbud	2020-21 PCF Proj	FY 2021 Agency Request			FY 2021 Recommendation			FY 2021 Opbud
					Base	Expansion	Total	Base	Expansion	Total	
Senate Chief Clerk											
52000C Payroll	0.0	0.0	0.0	0.0	8.0	0.0	8.0	0.0	0.0	0.0	0.0
54000C Other Expenses	0.0	0.0	0.0	0.0	10.0	0.0	10.0	0.0	0.0	0.0	0.0
54661C DOIT Telecommunications	0.0	0.0	0.0	0.0	22.0	0.0	22.0	0.0	0.0	0.0	0.0
400 Other	0.0	0.0	0.0	0.0	32.0	0.0	32.0	0.0	0.0	0.0	0.0
TOTAL EXPENSE	0.0	0.0	0.0	0	40.0	0.0	40.0	0.0	0.0	0.0	0.0

Saving as PDF

Click the arrow next to the downloaded file in the browser window.



Click **Open** to open in a new browser window.

Click **Open with System Browser** to open in your computer's default PDF viewer. Depending on your computer settings, this may be Adobe Reader or another PDF viewer.

The PDF will include the report header and provide navigation through the tabs on the left-hand side.

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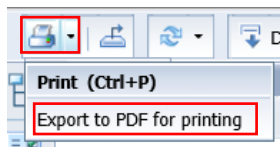
- Main
 - P114
 - Z-CO
 - Revenues
 - Expenses

State of New Mexico
 (Dollars in Thousands)

	2018-19	2018-19	2019-20	2020-21	FY 2021 Agency Request			FY 2021 Recommendation			FY 2021
	Opbud	Actuals	Opbud	PCF Proj	Base	Expansion	Total	Base	Expansion	Total	Opbud
520000 Payroll	0.0	0.0	0.0	0.0	8.0	0.0	8.0	0.0	0.0	0.0	0.0
200 Personal Services & Employee Benefit	0.0	0.0	0.0	0.0	8.0	0.0	8.0	0.0	0.0	0.0	0.0
540000 Other Expenses	0.0	0.0	0.0	0.0	10.0	0.0	10.0	0.0	0.0	0.0	0.0
540610 DOIT Telecommunications	0.0	0.0	0.0	0.0	22.0	0.0	22.0	0.0	0.0	0.0	0.0
400 Other	0.0	0.0	0.0	0.0	32.0	0.0	32.0	0.0	0.0	0.0	0.0
TOTAL EXPENSE	0.0	0.0	0.0	0	40.0	0.0	40.0	0.0	0.0	0.0	0.0

22.10. Print a Report

Clicking directly on the Print icon will download a PDF of the entire document (all tabs) that can be printed. Clicking on the arrow on the print button and selecting Print will provide additional options for what is to be generated into a PDF.



Print

Print Range

- All Reports
- Current report
 - All
 - Current Page
 - Pages:

Enter Page Range (Example: 1,3,5-11).

Page size

Letter

Margins

Top: 0.31 inches
 Left: 0.31 inches
 Right: 0.31 inches
 Bottom: 0.31 inches

Scaling

- Adjust to: 100 % normal size
- Fit to: Auto page(s) wide Auto page(s) tall

Orientation

- Portrait
- Landscape

Print Cancel