

Luma Budget Quick Reference Guide (QRG)

Agency Header (2400) & Division Descriptions (2500)

Agency Header (2400) & Division Descriptions (2500)

Initiator: Any budget employee

Reason: To establish your agency header and division descriptions.

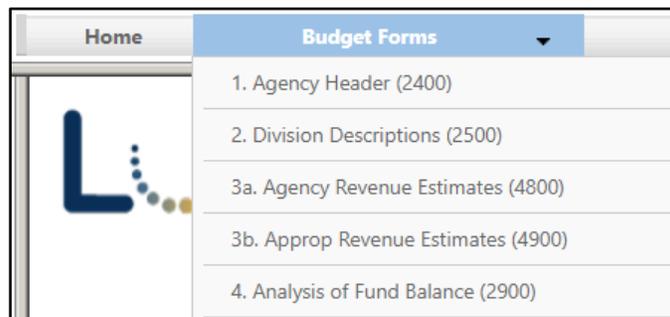
General Notes:

- These two forms make up the agency introduction as described in the Budget Development Manual (BDM).
- The “Division Descriptions (2500)” form, will flow into the “Division Description (B-3)” report.
- There is no detail tab on this form since there is no financial information required.

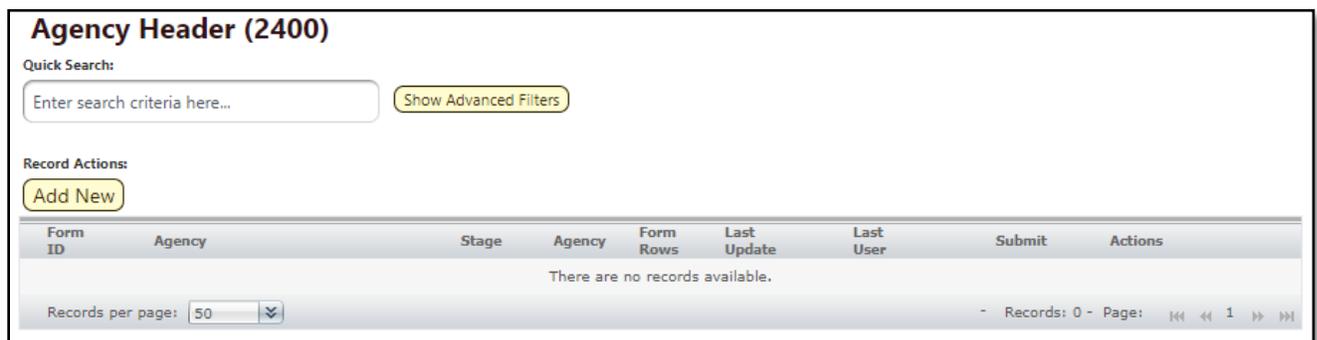
Agency Header (2400)

Create a New Parent entry

1. Select form 2400 from the form dropdown menu to open the form’s summary overview screen. This screen will list all entries matching the stages (workflow steps) associated with the user's access in the system.
 - i.e. Listed forms have not been “submitted”, moved to other stages, or have been returned to the user from another stage.



2. Click **Add New** to open the “Create a new Budget Form – 2400” screen

A screenshot of the "Agency Header (2400)" form overview screen. The screen features a "Quick Search" section with a text input field containing "Enter search criteria here..." and a "Show Advanced Filters" button. Below this is a "Record Actions" section with an "Add New" button. A table with columns for "Form ID", "Agency", "Stage", "Agency", "Form Rows", "Last Update", "Last User", "Submit", and "Actions" is displayed. The table content shows "There are no records available." At the bottom, there is a "Records per page" dropdown set to "50" and a pagination control showing "Records: 0 - Page: 1".

3. Select the appropriate **Stage** and **Agency**.
 - Not all budget forms start in Stage 1.
 - Agencies you have permission to access will appear in the field's lookup tool.
4. Click **Save** to create a parent entry and be taken to its "Budget Form Header".

5. Fields in the "Budget Form Header" are auto-populated with system-generated information. Review this information for accuracy.

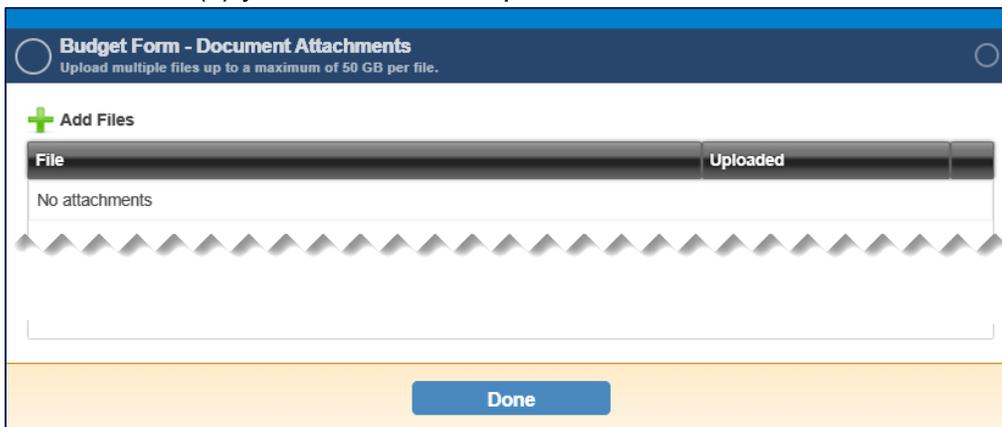
Instance ID	Form Definition	Definition Name	Name	Agency
3242	2400	Agency Header (2400)	State Treasurer	150

6. Review the "Statutory Authority" for accuracy.
 - The overall statutory authority for the agency will be loaded into a master data table for the agency and will appear on several reports as the authorizing statute.
 - This will be auto-populated by the system. A manual change is only necessary if there is a statutory change for the overall agency.

7. Once you have verified the information is accurate, select **Save**.
 - If successful, the following green message will appear at the top of the screen: **Agency Header (2400) was successfully updated.**
8. Upload any required attachments.

ATTACHMENTS

1. From the “Budget Form Header”, click the “Attachment” tab to open the “Budget Form - Document Attachments” utility.
2. Click **Add Files** to open a file explorer dialogue, allowing you to locate and select the document(s) you would like to upload to the form.



Note: You may upload multiple documents at once as long as they do not exceed the 50 GB file limit.

3. Attach the following documents in the Agency Header – Form 2400:
 - Organizational Charts (PDF Only)
 - 5-year Capital Needs Plan (if applicable)
 - Federal Funds Inventory (if applicable)
 - Performance Report (if applicable)
 - Permanent Building Fund Capital Budget Request (if applicable)

Note: These forms should be updated annually by all agencies.

4. Once you have verified the information is accurate, select **Save**.
 - If the save is successful, the following green message will appear at the top of the screen: **Agency Header (2400) was successfully updated.**

Division Descriptions (2500)

- A parent entry will need to be created for each appropriated “division” within an agency. A Division Description describes an appropriated budget to be presented to JFAC and does not necessarily match an agency’s internal organizational structure.
- **Legislative Budget Book:** <https://legislature.idaho.gov/Iso/bpa/pubs/lbb>
 - Department descriptions for each division can be found in the Legislative Budget Book. These can be copied or used as references.
 - In the example below, the budget book listing for Health and Welfare shows 13 Divisions, each with its own appropriation budget.

Department of Health and Welfare					
Historical Summary					
OPERATING BUDGET	FY 2020 Total App	FY 2020 Actual	FY 2021 Approp	FY 2022 Request	FY 2022 Gov Rec
BY DIVISION					
Child Welfare	87,976,000	81,980,900	90,730,300	80,972,800	80,628,600
Developmentally Disabled Srvc	32,794,600	29,846,500	32,631,200	33,284,800	33,048,300
Independent Councils	14,776,500	13,101,100	17,111,600	14,591,000	14,584,400
Indirect Support Services	48,290,100	44,590,000	47,624,100	47,940,200	47,759,700
Medicaid, Division of	2,894,602,300	2,798,991,200	3,115,077,600	3,587,926,800	3,587,766,200
Mental Health Services	50,375,500	45,988,300	46,731,500	47,394,800	47,180,700
Psychiatric Hospitalization	38,887,200	42,098,400	44,753,200	48,975,400	48,626,000
Public Health Services	124,217,400	106,818,700	126,846,900	127,635,600	127,445,800
Service Integration	6,130,900	5,354,300	6,151,900	6,228,000	6,196,600
Substance Abuse	17,459,000	15,534,800	13,064,200	16,544,300	16,983,100
Welfare, Division of	166,532,600	169,238,800	166,097,800	167,139,400	166,605,700
Health Care Policy Initiatives	1,125,800	673,500	0	0	0
Licensing and Certification	7,555,900	7,337,500	7,622,800	7,796,100	7,753,200
Total:	3,490,723,800	3,361,554,000	3,714,443,100	4,186,429,200	4,184,578,300
BY FUND CATEGORY					
General	877,601,600	809,440,400	901,858,200	961,360,300	946,957,500
Dedicated	339,160,900	316,343,600	355,977,800	495,547,900	509,216,000
Federal	2,273,961,300	2,235,770,000	2,456,607,100	2,729,521,000	2,728,404,800
Total:	3,490,723,800	3,361,554,000	3,714,443,100	4,186,429,200	4,184,578,300
Percent Change:		(3.7%)	10.5%	12.7%	12.7%
BY OBJECT OF EXPENDITURE					
Personnel Costs	227,916,200	214,872,000	232,645,300	244,823,900	242,348,000
Operating Expenditures	220,381,400	170,400,600	203,422,100	187,862,500	188,037,500
Capital Outlay	1,617,900	2,171,500	535,800	0	0
Trustee/Benefit	3,040,808,300	2,974,109,900	3,277,839,900	3,753,742,800	3,754,192,800
Total:	3,490,723,800	3,361,554,000	3,714,443,100	4,186,429,200	4,184,578,300
Full-Time Positions (FTP)	2,917.11	2,917.11	2,972.44	2,995.94	2,995.94
Department Description					
The Idaho Department of Health and Welfare provides services and regulatory programs in partnership with taxpayers, consumers, and providers to promote economic well-being, support vulnerable children and adults, enhance public health, and encourage self-sufficiency. [Chapter 10, Title 56, Idaho Code]					

- The above sample description is a general description for Health and Welfare overall. Each “division” will have its own description and B3 report.

Creating a New Parent entry

1. Select “Division Descriptions (2500)” from the form dropdown menu to open the summary overview screen.
 - This screen will list all entries matching the stages (workflow steps) associated with the user's access in the system.

2. Division Descriptions (2500)

Quick Search: [Show Advanced Filters](#)

Record Actions: [Add New](#)

Form ID	Appropriation Name	Stage	Approp	Form Rows	Last Update	Last User	Submit	Actions
7272	Department of Fish and Game	2508	FG1	0	4/12/2021	jonathan.oswal	Submit	Header Delete
4372	Public Employee Retirement System	2502	PE1	0	4/26/2021	alex.simpson@	Submit	Header Delete

Records per page: 50 [Records: 2](#) - Page: [1](#)

2. Click **Add New**, the “Create a new Budget Form – 2500” dialog box will appear.

Create a new Budget Form - 2500

[Close](#)

Stage:*

Division [Search](#) [X](#)

State Controller

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

3. Select the appropriate **Stage**.
4. Select the **Division** code associated with the “division” in question.
 - This is a budget level summary that is included in the Legislative Budget Book.
5. Click **Save** to create a parent entry for the selected division.
 - Each division will need a parent entry for each appropriated “division” or budget.
6. Once the parent entry is created, its “Budget Form Header” screen will display.

HEADER TAB

- The “Budget Form Header” outlines the appropriated division’s Division Description as well as the division’s appropriation bills for the current and prior fiscal year.
 1. Verify the accuracy of the “Full Division Description”. If any changes are made, check the “Description Changes” Box.
 - These descriptions are auto-populated from the Legislative Budget Database.
 - If no description is provided, enter a description fitting the purpose and mission of the division in question.
 2. Review the appropriation bill numbers for the current and prior year.
 - These are auto-populated from the Legislative Budget Database.
 - If no appropriation bill numbers have been populated, enter the appropriation bill numbers using the format shown below:

The screenshot displays the 'Budget Form Header' interface. At the top, there are buttons for 'Comment History', 'Comment', 'Submit', and 'Close'. Below this is a table with the following data:

Instance ID	Form Definition	Definition Name	Name	Approp
9381	2500	2. Division Descriptions (2500)	State Controller	SC1

Below the table, there are input fields for 'Stage Code:*' (2507) and 'Division' (SC1). The 'Division' dropdown shows 'Division Administrator/Deputy I' and 'State Controller'. There are tabs for 'Header' and 'Attachments'. The 'Full Division Description:*' field contains text about the State Controller's role. To the right, there are input fields for 'Prior year appropriation bill number(s):*' (S1191) and 'Current year appropriation bill number(s):*' (S1405), along with a 'Description Changes' button and a 'Save' button.

Result: You successfully completed the “Agency Header (2400)” and the “Division Description (2500)” form. This has built and attached all information needed for your agency’s budget introduction(s).

Additional training resources can be found on the SCO website’s Luma Budget Training page: <https://www.sco.idaho.gov/LivePages/luma-budget-support-and-training.aspx>

Date: June 29, 2021
Version 4