

# Luma Budget Quick Reference Guide (QRG)

## Budget Submission (9900)

### Budget Submission (9900)

**Initiator:** Budget Controller or Agency Director

**Reason:** Mass movement of budget forms including final review and submission to DFM and LSO.

**General Notes:**

- Ensure all agency requests are prioritized in your “Line Items & Supplementals” (5100) forms or the “Line Item & Supplemental Request Re-prioritization” form.
- All forms must be at stage 9 or 10 before they will appear on the 9000 form.
- Budget Submission (9900) is utilized by both the budget controller and the agency director.
  - **Budget Controller** - Moves the budget to stage 10 for director review.
  - **Agency Director** - Formally submits the budget to DFM and LSO by moving the budget to stage 11.
- Once the Agency Head moves the budget to Stage 11, the system will apply an electronic signature of the director to the “Agency Summary and Certification (B2)” report and submits the budget request for review/approval.

### Submit Your Budget

1. Select form 9900 from the form dropdown menu to open the form’s summary overview screen.

**Agency Budget Submission**

Quick Search:  [Show Advanced Filters](#)

Record Actions: [Add New](#)

| Form ID | Agency Name     | Stage | Agency | Form Rows | Last Update | Last User    | Actions                |
|---------|-----------------|-------|--------|-----------|-------------|--------------|------------------------|
| 2514    | State Treasurer | 9909  | 150    | 0         | 2/8/2021    | chuck.hulem@ | <a href="#">Header</a> |

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2. Find your agency’s parent entry in the summary overview list, then click the entry’s **Header** action button to open the “Edit Budget Form - 9900” screen.

**Note:** Your agency’s parent entry will be listed when budget forms have progressed to stage 9 or 10.

## HEADER TAB

- The “Edit Budget Form – 9900” screen will populate default field values for Stage Code, Agency, Name, and Certification Statement.
3. Review the information to ensure the correct agency form was selected and you understand the “Certification Statement”.
    - If the agency information is incorrect, click **Close** to return to the summary overview screen.

**Note:** Do not change the content of the fields on this screen.

**Edit Budget Form - 9900**

Comment History Comment Close

| Actions | Instance ID | Form Definition | Definition Name              | Approp |
|---------|-------------|-----------------|------------------------------|--------|
|         | 9620        | 9900            | 19. Budget Submission (9900) | 100    |

Stage Code:\* 9909 Budget Controller (Primary 9)  
Agency 100 Senate

Header Budget Submit Attachments

Name:\* Senate Save

**Certification Statement:**  
In accordance with 67-3502, Idaho Code, I certify the attached forms properly state the receipts and expenditures of the department (agency, office, or institution) for the fiscal years indicated. The summary of expenditures by major program, fund source, and standard class is indicated below.

4. Select the “Budget Submit” tab to proceed.

## BUDGET SUBMIT TAB

- The “Mass Form Submission” screen lists all budget forms in your stage.
  - The information listed on this tab is derived from your agency budget form entries.
5. Review the “Mass Form Submission” screen, ensuring the data is accurate.

### Column Definitions:

- **DU 3.0:** Your current budget year’s original appropriation
- **Requested Changes:** The total amount in changes to the budget request.
- **Total Request:** The total amount your agency is requesting for the next budget year.

- **Agency-Approp:** Your agency number or the Appropriation unit assigned to the form.
- **Form:** The Budget Form number.
- **Header ID:** The unique, system-generated instance ID number for each parent entry.
- **Name:** A default name or the name the budget entry user provided for that form.
- **Stage:** Displays which stage the form is currently on. The stage will be the last two numbers in the string, either **##09** (stage 9) or **##10** (stage 10).

### Mass Form Submission

| DU 3.0      | Requested Changes | Total Request |
|-------------|-------------------|---------------|
| \$4,336,500 | \$2,096,600       | \$6,433,100   |

Record Actions:

Submit Entire Budget
Close

| Agency-Approp | Form | Header ID | Name                        | Stage | Decision Unit | Expense Changes |
|---------------|------|-----------|-----------------------------|-------|---------------|-----------------|
| 150           | 5300 | 1990      | Gov's Approved Reduction    | 5309  | 06.61         | \$0             |
| 150           | 5300 | 1992      | Legislative Reappropriation | 5309  | 04.11         | \$2,300         |
| 150           | 5400 | 1964      | Account Transfers           | 5409  | 06.21         | \$0             |
| 150           | 5400 | 1966      | Account Transfers           | 5409  | 06.21         | \$1,000         |
| 150           | 5400 | 1993      | Program Transfer            | 5409  |               | \$0             |
| 150           | 5600 | 1998      | FTP or Fund Adjustments     | 5609  |               | \$5,000         |
| 150           | 5600 | 1998      | FTP or Fund Adjustments     | 5609  |               | \$0             |
| 150           | 5700 | 3224      | Other CEC Adjustments       | 5709  | 10.68         | \$40,500        |
| 150           | 6200 | 2390      | State Treasurer             | 6209  |               | \$33,100        |
| 150           | 6200 | 2390      | State Treasurer             | 6209  |               | \$17,600        |
| 150           | 6200 | 2390      | State Treasurer             | 6209  |               | \$34,200        |
| 150           | 6200 | 3232      | State Treasurer             | 6209  |               | \$0             |

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- **Decision Unit (DU):** The budget form DU number.
  - Verify that all lines in this column have a value. If any are blank, a counter/priority value may not be selected on that form's header page.
- **Expense Changes:** Shows the net financial result of the form on the budget request.

**Note:** We recommend that you thoroughly review all pertinent Birst reports relating to your submission before submittal. These reports can provide a more succinct view of your budget request.

6. If all of the totals are correct, click the **Submit Entire Budget** button. This will take you to the “Budget Form Mass Submit” staging screen.

7. Select the stage you would like to move your budget into.
  - To submit the budget for agency director review, select **9910** (stage 10).
  - To submit the final budget to DFM and LSO, select **9911** (stage 11).

8. List the email addresses of personnel or workgroups you would like to have notified of the budget submission.
  - a. To add an individual email address, type/copy it directly in the “Emails” text box
  - b. To add a workgroup, click on the **Add Workgroups** action button,
  - c. The “Select Workgroups to Email” screen will display. Use the quick search utility to find the desired workgroup.
  - d. Check the box next to each workgroup you would like to add to the list.
  - e. Click **Add Emails For Selected Groups** to be returned to the staging screen.

| <input type="checkbox"/> | Code                         | Name          | Description | Users |
|--------------------------|------------------------------|---------------|-------------|-------|
| <input type="checkbox"/> | 260                          | Fish & Game   |             | 1     |
| <input type="checkbox"/> | Aaron.Howard@dhw.idaho.gov   | Aaron Howard  |             | 1     |
| <input type="checkbox"/> | adam.jarvis@dfm.idaho.gov    | Adam Jarvis   |             | 1     |
| <input type="checkbox"/> | adam.zaragoza@idpr.idaho.gov | Adam Zaragoza |             | 1     |
| <input type="checkbox"/> | adowell@doc.idaho.gov        | Ashley Dowell |             | 1     |
| <input type="checkbox"/> | alan.pace@lrc.idaho.gov      | Alan Pace     |             | 1     |

9. Click the **Submit** action button to move your form to the stage selected and notifies the selected groups/people of the move.

**Note:** Once submitted to Stage 11, a budget cannot be retrieved by an agency. DFM or LSO will have to send the budget back to the agency should revisions be needed.

**Result:** You have submitted your budget for director review OR you have submitted your budget to DFM and LSO.

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>

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