

Luma Budget Quick Reference Guide (QRG)

Inflation General & Medical (5800)

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Initiator: Any budget employee

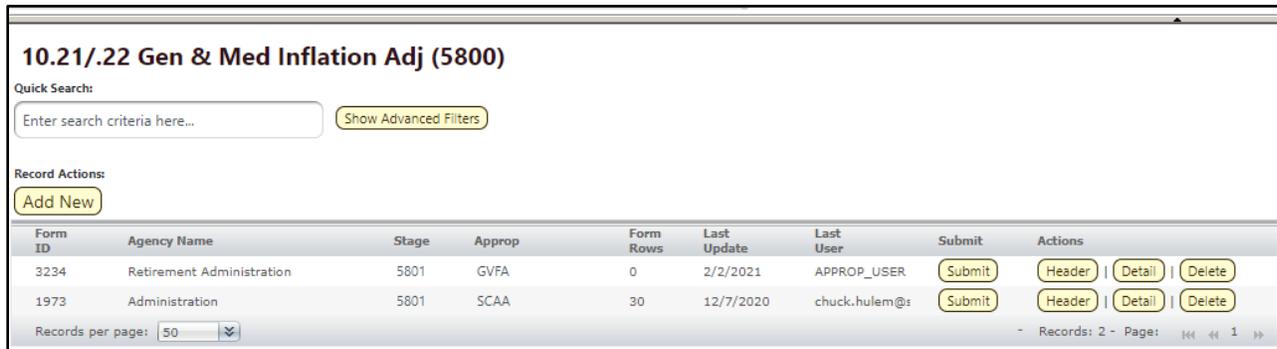
Reason: Report on inflation of general and/or medical expenses.

General Notes:

- This budget form is used to add an inflationary adjustment to the budget request.
- This form is not required but is available to agencies that wish to use it.

Create a Parent Entry

1. Select form 5800 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 – 5800" screen.



10.21/.22 Gen & Med Inflation Adj (5800)

Quick Search: [Show Advanced Filters](#)

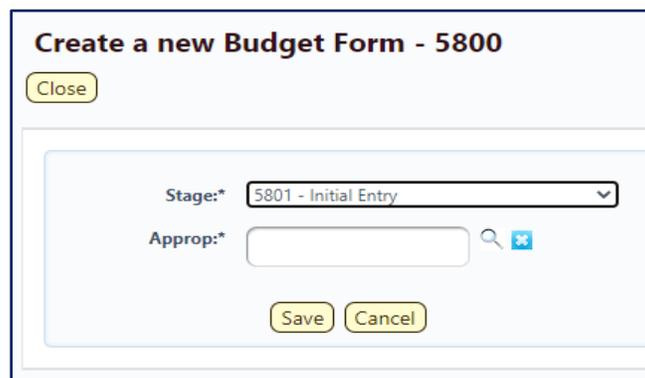
Record Actions: [Add New](#)

Form ID	Agency Name	Stage	Approp	Form Rows	Last Update	Last User	Submit	Actions
3234	Retirement Administration	5801	GVFA	0	2/2/2021	APPROP_USER	Submit	Header Detail Delete
1973	Administration	5801	SCAA	30	12/7/2020	chuck.hulem@s	Submit	Header Detail Delete

Records per page: 50

Records: 2 - Page: 1

3. Fill in mandatory fields:
 - a. **Stage:** Not all budget forms start in Stage 1.
 - b. **Appropriation Unit (AU):** Select an AU your agency would like to add an inflation adjustment to.



Create a new Budget Form - 5800

[Close](#)

Stage:*

Approp:*

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

4. When ready, click **Save** to continue to the "Budget Form Header" screen.

HEADER TAB

- The “Budget Form Header” tab is where inflation adjustment request reporting narratives are entered.
- The Name field will auto-populate with the general description for the selected AU.
 1. Type or paste the justification for the general and/or medical inflationary adjustments of the previously selected appropriation unit.

Budget Form Header

Comment History Comment Submit Close

Instance ID	Form Definition	Definition Name	Name	Approp
3756	5800	9. Inflation, Gen & Med (5800)	SCDA-Dedicated fund spending Aut	SCDA

Stage Code:* 5801 Initial Entry

Approp: SCDA Computer Center

Header Detail Attachments

Name:* SCDA-Dedicated fund spending Authority 1 Save

Explanation for DU 10.21 General Inflationary Adjustments: The Governor recommends dedicated fund spending authority for general inflation.

Explanation for DU 10.22 Medical Inflationary Adjustments:

Analyst's Comments:

2. Once you are satisfied with the explanations, click **Save**.
3. Navigate to the “Detail” tab to manage appropriation adjustment data.

DETAIL TAB

- The Detail tab will auto-populate with the previous year’s actuals and the current year’s spending plan (if available) for the AU selected.
- This form will be updated with appropriation data every year. If there is no data for the AU selected, you may need to run reports and upload the data to this form.
 - Much of the historical data will not be available in the new Luma Finance and Budget systems. IBIS is still available and can be used to pull historical data.

1. From the “Budget Form Header” screen, select the “Detail” tab to open the “Budget Form Lines” screen.
2. Modify appropriation data as necessary:

Budget Form Lines

Close Export Import Refresh

ID	Form	Approp	Form Name	DU 10.21 Total	DU 10.22 Total
3756	5800	SCDA - Computer Center	9. Inflation, Gen & Med (580)	\$1,600,000	\$0

Quick Search:
Enter search criteria here.....

Actions: Add New Copy

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	FY 20 Actuals	FY 21 Total Spend Plan	FY 21 On-Going Spend Plan Adjustment*	FY 21 One-Time Spend Plan Adjustment*	FY 21 Estimated Expenditures*	General Inflation DU 10.21*	Medical Inflation DU 10.22*	Comments / Notes
1		SCDA	48000	1404000	0	0	550	81,107	0	0	0	0	0	0	
2		SCDA	48000	1404000	0	0	558	17,620	0	0	0	0	0	0	
3		SCDA	48000	1404000	0	0	559	33,558	0	0	0	0	0	0	
4		SCDA	48000	1404000	0	0	570	14,696	0	0	0	0	0	0	
5		SCDA	48000	1404000	0	0	578	291,158	0	0	0	0	0	0	
6		SCDA	48000	1404000	0	0	587	1,386,077	0	20,000	0	1,400,000	1,600,000	0	General Market Inflation
7		SCDA	48000	1404000	0	0	590	47,200	0	0	0	0	0	0	
14		SCDA	48000	1404000	0	0	66	232,30	0	0	0	0	0	0	
15		SCDA	48000	1404000	0	0	676	12,395	0	0	0	0	0	0	

Records per page: 50

- **Add New:** This button will open the Add New Line utility, allowing the user to manually enter a new form line.
 - If a new line duplicates an existing accounting string (Approp., Fund, Account), it will not create a new line. Instead, totals will be combined and Comments/Notes will be replaced with the latest entry.
- **Copy:** This button allows users to copy a highlighted form line, saving time and effort when new lines share previously created form line details.
- **Export/Import:** Click **Export** to pull a template and existing line information. Modify the form in Excel before clicking **Import** to upload your changes.

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Comments / Notes
1		SCAA	10000	0	0	

Records per page: 50

Records: 1 - 1 of 1 - Pages: 1

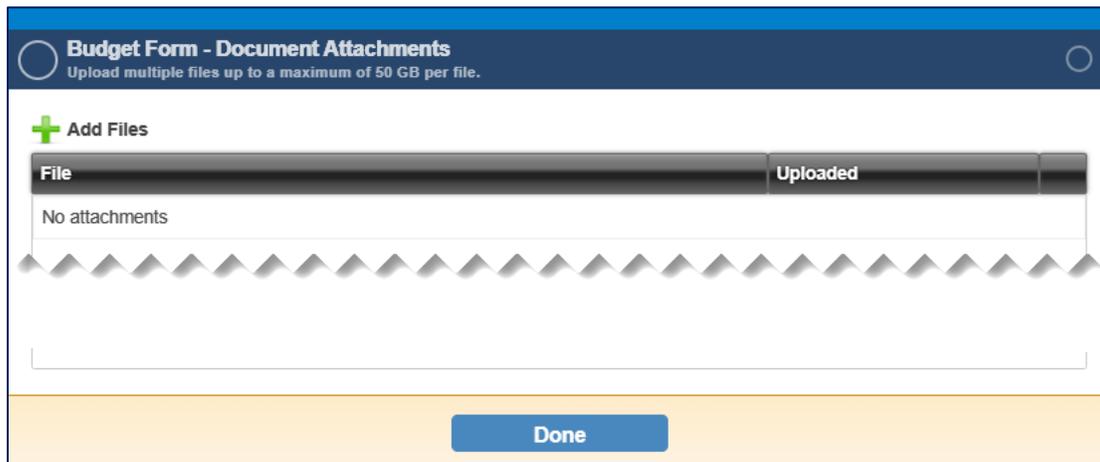
- **Pencil Edit:** Clicking the pencil icon at the end of a form line will allow the user to make quick edits to form line fields (e.g. amount, comments, etc.). 
- **Lookup (Magnifying Glass):** Opens a contextual search utility that displays all available options for the field.
- **Comments/Notes:** Utilize this field to make notes and add additional information about a given form line as needed.

- **Approp:** Populates with previously chosen appropriation unit. The parent entry cannot be changed and must be deleted if the wrong appropriation unit was set.
- **Fund:** Select the applicable fund number.
- **Program** (optional): Select an associated program if your agency enters its budget with that level of detail.
- **Project** (optional): Select an associated project if your agency enters its budget with that level of detail.
- **Account:** The summary account number.
- **Org Unit** (optional): Select an associated organizational unit if your agency enters its budget with that level of detail.
- **Comments/Notes** (optional): Specific notes can be added to this field.
- **Audit Text:** Comment fields, visible only on the form line audit history screen.

- **FY Current On-going Spend Plan Adjustments:** Expected on-going increase.
 - **FY Current One-time Spend Plan Adjustments:** Expected one-time increase.
 - **FY Current Estimated Expenditures:** Estimated expenses for the current year.
 - **General Inflationary Request DU 10.21:** Inflationary request for general expenses.
 - **Medical Inflationary Request DU 10.22:** Inflationary request for medical expenses.
3. Click “**Refresh**” to populate the data, then review the information for accuracy.

ATTACHMENT TAB

Selecting the “Attachment” tab will open the “Budget Form – Document Attachments” utility. Clicking **Add Files** will 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.

Result: You successfully added a general and/or medical inflationary adjustment to your budget request.

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: July 9, 2021
Version 4