

# Luma Budget Quick Reference Guide (QRG)

## Inflation, Contract (6600)

### Inflation, Contract (6600)

**Initiator:** Any budget employee

**Reason:** Submit decision unit (DU) 10.23 requests for contract inflation adjustments.

**General Notes:**

- This form provides data to the Contract Inflation (B-4 Part C) report.
- Form 6600 requires data from various financial system reports.
- Typically, each agency will have one 6600 parent entry. Additional parent entries can be created if there is a need for separate DU 10.23 requests.

### Create a Parent Entry

1. Select form 6600 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 – 6600" screen.

**Contract Inflation DU 10.23 (6600)**

Quick Search: Enter search criteria here... Show Advanced Filters

Record Actions: Add New

Form ID	Description	Stage	Agency	Form Rows	Last Update	Last User	Submit	Actions
There are no records available.								

Records per page: 50 Records: 0 - Page: 1

3. Fill in mandatory fields:
  - a. **Stage:** Not all budget forms start in Stage 1.
  - b. **Agency:** Agencies you have permission to access will appear in the field's lookup tool.
4. When ready, click **Save** to continue to the "Budget Form Header" screen.

**Create a new Budget Form - 6600**

Close

Stage: Select a Stage Code

Agency

Save Cancel

## HEADER TAB

- The “Budget Form Header” tab is where request reporting narratives are entered.

**Budget Form Header**

Comment History Comment Submit

Instance ID	Form Definition	Name	Agency
3226	6600	10. Inflation, Contract (6600)	Public Employee Retirement System 183

Stage Code:\* 6601 Agency 183  
Initial Entry Public Employee Retirement Sy

Header Contract Inflation Attachments

Name:\* Public Employee Retirement System Save

Brief Description (shown on Detail Report):

Analyst's Comments:

1. **Name:** Give your form a short name. This will populate the “Name” field on the top line as well as the summary overview and throughout the system.
2. **Brief Description:** The text in this field will appear on the “Budget Detail” report and can be edited as necessary. Please keep these explanations brief.
3. Once you are satisfied with the brief description, click **Save**. Then, navigate to the “Contract Inflation” tab.

## CONTRACT INFLATION TAB

- Use financial system records to gather required data.
  - Changes are recorded by appropriation unit (AU) and fund.
  - Contracts split between different funds or accounts will require multiple entries to account for the various funding options.
  - Contract change increases spread across multiple appropriation units will require multiple entries to split the increase between the appropriation units.
1. From the “Budget Form Header” screen, select the “Contract Inflation” tab to open the “Budget Form Lines” screen.
  2. Click **Add New** to open the “Add New Line” utility. Use this utility to create a new line entry that includes the following data:
    - Contract actuals for the last four fiscal years.
    - Estimated contract annuals for the current fiscal year (CY).

- The requested contractual percentage change.
  - You will have to calculate and enter both the percentage change as well as the dollar amount requested.

**Budget Form Lines**

Close Export Import Refresh

ID	Form	Agency	Form Name	DU 10.23 Total
10376	6600	140 - State Controller	10. Inflation, Contract (6600)	\$0

Quick Search:  
Enter search criteria here...

Actions:  
Add New Copy

Row	Audit Trail	Approp*	Fund*	Org Unit	Program	Project	Account*	Item #	Contract (Who and What)	FY 17 Actuals	FY 18 Actuals	FY 19 Actuals	FY 20 Actuals	FY 21 Estimated Actuals	Contractual Percent Change (i.e., 2%)	FY 22 Inflation Adjustment	Contract Dates From - To MM/DD/YYYY - MM/DD/YYYY
1		SCCA	12501	1402300	0	140-1530	578	1005	Example, Example	1,780,554	1,780,698	1,781,258	0	0	0	0	06/48/2022 through 06/72/2056

Records per page: 50 | 100 | 200 | 500 | 1000

Records: 1 - 1 of 1 - Pages: 100 | 40 | 1 | 30 | 100

- **Copy:** This button allows users to copy a highlighted form line, saving time and effort when new lines share previously used form line details.
- **Export/Import:** Click **Export** to pull formatting and line information. Modify the form in Excel before clicking **Import** to upload your changes.

Row	Audit Trail	Approp*	Fund*	Org Unit	Contractual Percent Change (i.e., 2%)	FY 22 Inflation Adjustment	Contract Dates From - To MM/DD/YYYY - MM/DD/YYYY
1		SCCA	12501	1402300	0	0	06/48/2022 through 06/72/2056

- **Pencil Edit:** Clicking the pencil icon at the end of a form line allows the user to make quick edits to form line fields (e.g. amount, percentage change, etc.).

**Budget Form Entry - Add New Line**

Page Actions:  
Close

Form ID	Form Definition
10376	6600

Approp:\*  Fund:\*  DU:\*  Program:  Item #:\*

Project:  Account:\*  Contract Infl:  Org Unit:

Contract Who & What:\*

Contract Dates:\*

FY 17 Actuals:  Audit Text:

- **Approp. (AU):** Appropriation unit that the adjustment is being requested for.
- **Fund:** Fund that is impacted by the change.

- **DU:** The DU will default to 10.23
- **Program:** (optional): Select an associated program if your agency enters its budget with that level of detail.
- **Item #:** Assigning different Item numbers will prevent the roll-up of identical accounting entries (Approp., Fund, Account). Using item numbers can also be used to indicate if certain entries are tied together.
- **Project:** (optional): Select an associated project if your agency enters its budget with that level of detail.
- **Account #:** Add the correct three-digit Summary Account number.
- **Org. Unit:** (optional): Select an associated organizational unit if your agency enters its budget with that level of detail.
- **Contract Who & What:** Vendor name and contracted services that are a part of the request.
- **Contract Dates:** Beginning date and ending date of the contract.
- **FY Actuals:** Actual prior-year contract expenses. These are available in IBIS reports, past requests, and eventually in Luma Finance (when enough historical data is available).

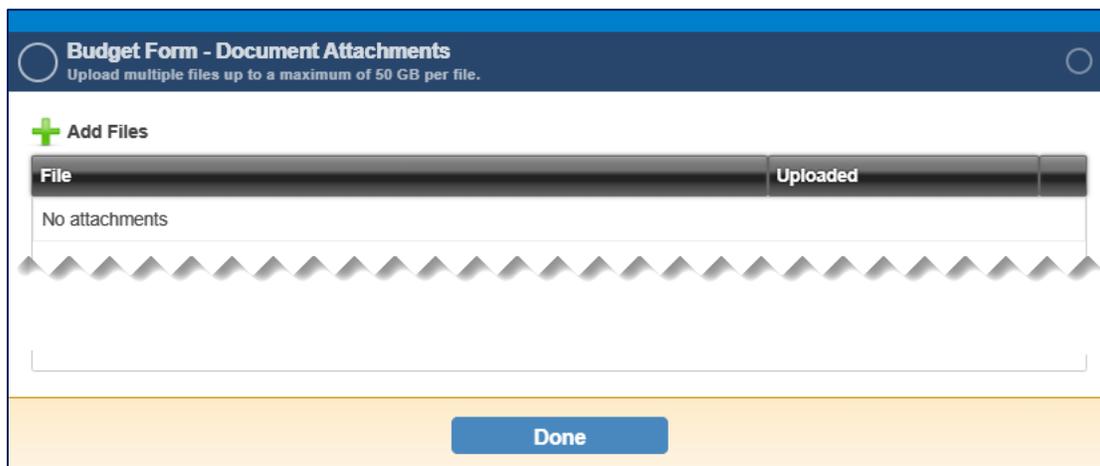
The screenshot shows a form with four rows of input fields. Each row has a numerical input field on the left and a text input field on the right labeled 'Audit Text'. The numerical fields are currently set to '0'. The labels for the numerical fields are: 'FY 20 Actuals', 'FY 21 Estimated Actuals', 'Contractual Percent Change (i.e., 2%)', and 'FY 22 Inflation Adjustment'. The 'Audit Text' fields are empty.

- **Current Budget Year Estimated Actuals:** Estimate the expenditures for the remainder of the current budget year for the contract.
- **Contractual Percent Change:** Contracted percentage increase for the fiscal year in question.
  - If an addendum to the contract is available, it can be uploaded on the Attachments tab.

- **Budget Year (BY) Inflation Adjustment Requested:** To calculate this total, multiply the original amount by one plus the percentage increase (e.g. 13%=1.13).
  - There are no formulas in the system to auto calculate, but you can do this using Excel if you utilize the Import/Export utility.
- 3. Once all the required fields are completed click **Save**.
- 4. 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 reported contract inflation for your agency.

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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