

# Division of Financial Management Forms Application User Manual

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This manual will assist agencies, with step-by-step instructions, on how to utilize the Forms Application. This Forms application includes the Proposed Administrative Rules Form (PARF), Grant Form, and Non-Cognizable Request Form.

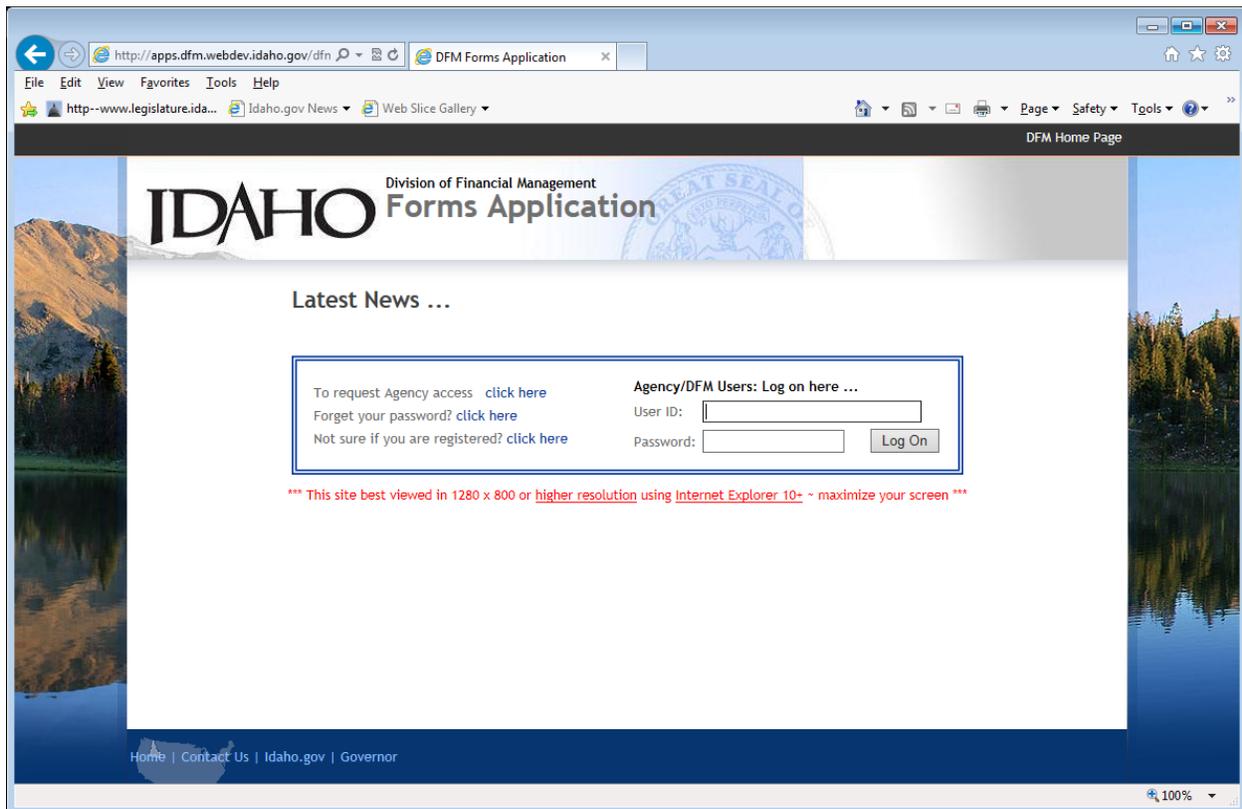
The automated Forms Application can be accessed at <http://apps.dfm.idaho.gov/dfmforms/>

The first screen to appear will be the login screen. Enter your User ID and Password. If you need a User ID and Password you can request access to the system from this main login page. There are three options for you to select: Request Agency access, Forget your password, or Not sure if you are registered.

Request Agency access will allow you to create your own User ID (6-10 characters) and allows you to select which agency(ies) you need to access.

**Note:** This system operates with a 30 minute time out feature. Once the system has sat idle for 30 minutes you will start to receive an "Error" message. You will need to log off the system and re-log in. Any unsaved data may be lost.

## Main Screen



The Forms Application is broken into separate tabs for each form: **Admin Rule, Grant, and Non cognizable**. There is also a **Reports** tab for printing a variety of reports.

Once you have logged on the system, it will default to the **Admin Rule** screen.

Clicking on the Tracking # down arrow will give you the ability to see previous or draft Admin Rules or create a new rule request by selecting “-New Rule Req-”.

**Note:** If you have access to multiple agencies you will also have to select the drop down arrow for **Agency** so you can select the desired agency.

Once you have filled in all the required fields designated with a red asterisk (\*) click **Save** and the system will automatically create the tracking number. You will also have the ability to upload a copy of the proposed rule by clicking on the **Upload ...** button. This is only mandatory if review is required prior to final approval by DFM.

## Admin Rule Screen

The screenshot displays the 'Admin Rule' screen with the following sections and elements:

- Navigation Tabs:** Admin Rule (selected), Grant, Non Cognizable, Reports.
- User Info:** Welcome Test User
- RULE SELECTION AND STATUS:**
  - Tracking#: [-Select-]
  - Status: [ ]
  - Agency: [-Select-]
  - Submitted Date: [ ]
  - Comments ... [ ]
- Action Buttons:** Add/Edit Rule (highlighted), Recommend, DFM Admin Approval
- CONTACTS:**
  - \* Contact 1: [-Select-] + Phone: [ ] \* Email: [ ]
  - Contact 2: [-Select-] + Phone: [ ] Email: [ ]
  - \* Person Authorizing Rule: [-Select-] + \* Phone: [ ] \* Email: [ ]
- RULE TYPE & NEGOTIATION:**
  - \* Statutory Authority: [ ] \* IDAPA Number: [ ]
  - This Rule is:  Proposed  Temporary  Proposed/Temporary
  - Upload Rule file: [ ] Upload ... [ ]
  - \* Agency has determined according to Idaho Code 67-5220(1):
    - This rule is to be negotiated
    - Negotiation of this rule is not feasible
- COMMENTARY:**
  - \* Provide a short explanation of the need for this rule: [ ]
  - \* Fiscal impact both positive and negative and include all funds: [ ]
  - \* Provide a summary of the changes this rule makes: [ ]
  - \* List of persons or interest group(s) affected by this rule: [ ]
- Bottom Buttons:** Save Rule, Delete Rule, Submit Rule, Spell Check

Depending on what you select for the type of rule (Proposed, Temporary, or Proposed/Temporary) the screen will give you other options.

This Rule is **Temporary or Proposed/Temporary**

**RULE TYPE & NEGOTIATION**

\* Statutory Authority:  \* IDAPA Number:

This Rule is:  Proposed  Temporary  Proposed/Temporary

Upload Rule file:

\* Temporary Rule: (Select One)

- Necessary to protect the public health, safety, or welfare; or
- Compliance with deadlines in amendments to governing law or federal programs; or
- Conferring a benefit.

\* Effective Date:

\* Explanation:

If temporary rule imposes a fee or charge, provide justification as described in Idaho Code 67-5226(2):

You will also be given various options for the section on whether the rule is to be **negotiated or not**.

### Rule to be negotiated

\* Agency has determined according to Idaho Code 67-5220(1):

- This rule is to be negotiated
- Negotiation of this rule is not feasible

\* Agency certifies that the rule: (Select One)

- has been negotiated; or
- will be negotiated with interested persons as outlined in Idaho Code 67-5220(3).

### Negotiation of this rule is not feasible.

\* Agency has determined according to Idaho Code 67-5220(1):

- This rule is to be negotiated
- Negotiation of this rule is not feasible

\* The Agency has determined: (Select One)

- Rule is temporary; or
- Rule is simple in nature; or
- Lack of identifiable representatives of affected interests; or
- Affected interests are not likely to reach consensus; or
- Other.

Explanation:

Once this has been completely filled out hit **Submit Rule**. Once you hit Submit an email notification will be sent to your assigned DFM Analyst and Governor's Office Special Assistant.

You will receive email notification of the final determination by the DFM Administrator.

If you are “Authorized to Advance to Rulemaking Process, DFM to review draft rule prior to publication” the system will allow you to go back into the Rule, attach the final rule and resubmit to DFM. Once DFM has reviewed the rule and made a determination you will be notified via email.

## Grant Screen

Clicking on the Tracking # down arrow will give you the ability to see previous or draft Grants or create a new grant request by selecting “-New Grant Req-”.

**Note:** If you have access to multiple agencies you will also have to select the drop down arrow for **Agency** so you can select the desired agency.

Once you have filled in all the required fields designated with a red asterisk (\*) click **Save** and the system will automatically create the tracking number. You will also have the ability to upload a copy of the **Exit Strategy** letter (which is mandatory for all grant requests) by clicking on the **Upload ...** button.

Admin Rule   Grant   Non Cognizable   Reports   Welcome Test User

**GRANT SELECTION AND STATUS**

Tracking#: -New Grant Req-   Status:   Agency: 194 - Human Resources, Division of   Submitted Date:

**Add/Edit Grant**   Recommend   DFM Admin Approval

**CONTACTS**

\* Contact 1: -Select- +   \* Phone:   \* Email:   Contact 2: -Select- +   Phone:   Email:   \* Person Authorizing Grant: -Select- +   \* Phone:   \* Email:

**GRANT TYPE**

\* Grant Type:  New    Renewal   \* CFDA:   \* DUNS#:   \* Patient Protection and Affordable Care Act Funds (PPACA)?  Yes    No

If yes, attach explanation of why you are requesting a waiver for these funds.   Explanation: ▶   **Attach ...**

**GRANT DETAILS**

\* Title of Grant:   \* Grant Application Due Date:   \* Brief Description (including source) and long-term impact:   \* Start Date:   \* Completion Date:

**FINANCIAL INFORMATION**

Federal: \$   State: \$   Local: \$   Other: \$   Total: \$   # of FTP:   Non-Federal Funding Description:

**EXIT STRATEGY**

Note: Each agency must submit a letter signed by the agency director outlining an exit strategy in the event the grant expires.   Exit Strategy: ▶   **Attach ...**

**Save Grant**   **Delete Grant**   **Submit Grant**   **Spell Check**

Once this form has been completely filled out hit **Submit Grant**. Once you hit Submit an email notification will be sent to your assigned DFM Analyst.

You will receive email notification of the final determination by the DFM Administrator.

## Non Cognizable Screen

Clicking on the Tracking # down arrow will give you the ability to see previous or draft Non-cog or create a new Non-Cog request by selecting “-New Non-cog Req-”.

**Note:** If you have access to multiple agencies you will also have to select the drop down arrow for **Agency** so you can select the desired agency.

Once you have filled in all the required fields designated with a red asterisk (\*) click **Save** and the system will automatically create the tracking number.

Admin Rule Grant **Non Cognizable** Reports Site Admin Welcome Anita Hamann

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**NON-COG SELECTION AND STATUS**

Tracking#:  Status:

Agency:  Submitted Date:

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**Add/Edit Non-cog** Recommend DFM Admin Approval

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**CONTACTS**

\* Contact 1:  + \* Phone:  \* Email:

Contact 2:  + Phone:  Email:

\* Person Authorizing Non-cog:  + \* Phone:  \* Email:

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**NON-COG DETAILS**

\* Amount of non-cog: \$   Ongoing  One-time \* Date the agency was notified:

\* Does the agency have sufficient existing spending authority?  Yes  No

\* Will the program affected take on a new service obligation?  Yes  No

\* What is the current year appropriation balance for relevant fund? \$

\* What is the projected year-end appropriation balance for relevant fund? \$

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**COMMENTARY**

\* What is the source of the fund and the circumstance that created the request?

\* Fund used to expend these moneys:  \* Program or service supported by these funds:

\* Explain how this request is in compliance with Idaho Code 67-3516(2):

\* Grant approval form tracking#:

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Then hit **Submit Non-cog** to submit the completed form. Once you hit Submit an email notification will be sent to your assigned DFM Analyst. By submitting this form you are verifying it complies with [Idaho Code 67-3516\(2\)](#).

If your non-cog is approved, your assigned DFM analyst will contact you for the Batch # and Batch Amount. Once the batch has been released, you will receive a notification via email.

## Reports Screen

The Reports Screen will give you the ability to print/view current year Admin Rule, Grant, or Non-cog form. It will also give you the ability to print/view any archived forms.

**Note:** Archived forms will be available in FY 2017 and will only contain forms submitted electronically not those submitted prior to FY 2016.

The screenshot shows a web interface with four tabs: "Admin Rule", "Grant", "Non Cognizable", and "Reports". The "Reports" tab is selected and highlighted. Below the tabs, there are two main sections: "CURRENT YEAR" and "ARCHIVED REQUESTS".

**CURRENT YEAR**

Select a tracking number to view the current year form:

Admin Rule Request Form:	<input type="text" value="-Select-"/>	<input type="button" value="Preview Admin Rule"/>
Grant Request Form:	<input type="text" value="-Select-"/>	<input type="button" value="Preview Grant"/>
Non-cog Request Form:	<input type="text" value="-Select-"/>	<input type="button" value="Preview Non-cog"/>

**ARCHIVED REQUESTS**

Select a tracking number to view the archived Request form:

Archived Admin Rule Request Form:	<input type="text" value="-Select-"/>	<input type="button" value="Preview Archived Rule"/>
Archived Grant Request Form:	<input type="text" value="-Select-"/>	<input type="button" value="Preview Archived Grant"/>
Archived Non-cog Request Form:	<input type="text" value="-Select-"/>	<input type="button" value="Preview Archived Non-cog"/>