

Budget Formulation and Management

Line Sequence Wizard User Guide



State of Rhode Island

February 22, 2022

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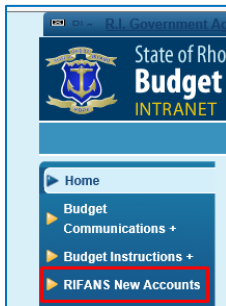
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LINE SEQUENCE WIZARD BFM INSTRUCTIONS

All agency CFO's should have access to this system. If you do not have access or need to have other staff given access, please contact Lisa Henriques at Lisa.Henriques@budget.ri.gov.

LINE SEQUENCE WIZARD

The wizard is used to create new line sequences in BFM. New line sequence requests were previously initiated using the Budget Office Intranet.



The wizard cannot be used to create specific line sequence #'s because the system looks for and assigns the next available in a line item. Therefore, if you need to create a specific line sequence number, please reach out to your budget analyst or Lisa Henriques @ Lisa.Henriques@budget.ri.gov.

Examples of this include:

- RICAP accounts where there is a 1:1 relationship between a line item and a line sequence.
- COVID accounts with specific naming convention patterns (see below).

“Prefix” is the first 2 digits of the LIS. “Type” is the fifth digit. 46 and 48 are the federal COVID line item prefix(es).

Federal COVID: Prefix/Type

46/1 = CARES ACT DIRECT

46/2 = CRF

46/3 = PREPAREDNESS ACT

46/4 = FFCRA

46/5 = PPEHCE ACT

46/6 = CAA21

46/7 = RESERVED

46/8 = RESERVED

46/9 = FEMA

48/1 = ARPA SFRF

48/4 = ARPA CCPF

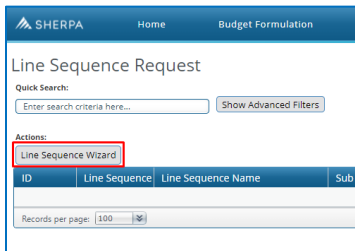
48/5 = ARPA DIRECT

To begin, select the Line Sequence Request menu item under Budget Formulation.



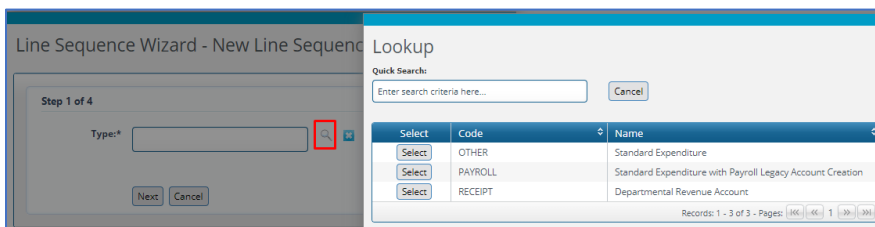
Using the Wizard

1. Click on the Line Sequence command button to open the wizard.

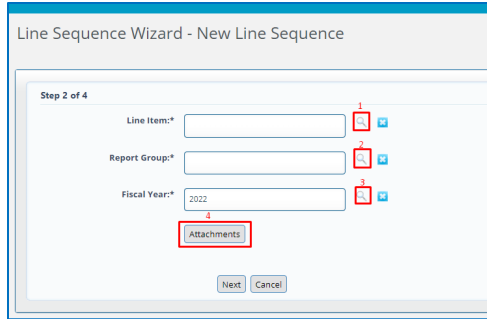


Step 1 of 4

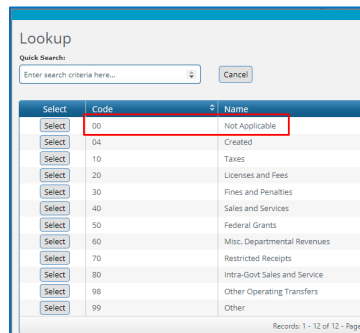
Choose a line sequence type. Choose type Payroll when a legacy account needs to be created for payroll. Choose Receipt when a Departmental Revenue account needs to be created. All other account types use the type Other (most used).



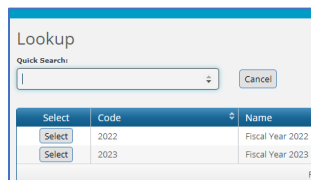
Step 2 of 4



1. Chose a line item
2. Choose a report group (used for Federal, Restricted, or Departmental Revenue accounts)
 - Select 50 for Source 02 accounts
 - Select 70 for Source 03 accounts*
 - *Restricted Account setup is designated for OMB Personnel only. Please reach out to your OMB Analyst for this type of account setup.**
 - The remaining selections are used for Departmental Revenue accounts. Choose code 00, name Not Applicable if your account is not a Federal, Restricted, or Departmental Revenue account.



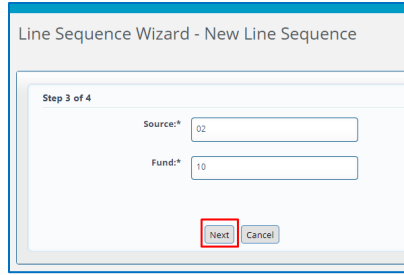
3. Choose Fiscal Year



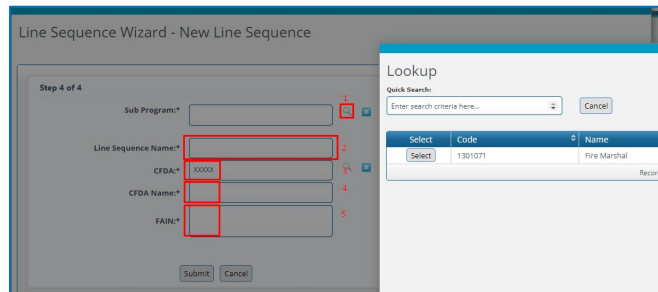
4. Attach supporting documentation. Mainly used for Federal Grant Award letters but any supporting documents can be attached.

Step 3 of 4

1. Confirm the below information
2. Click on next



Step 4 of 4



1. Choose a Sub Program
2. Enter a Line Sequence Name
3. Search for a CFDA. If one doesn't exist, type a CFDA in the space provided. **DO NOT USE a decimal.** RIFANS requires a decimal, but BFM doesn't.
4. Provide a CFDA name if one is not found in the previous step. If found, the name will prepopulate with the CFDA selected.
5. Enter the **Federal Award Identification Number.** (FAIN) is the unique ID issued by the Federal agency for each financial assistance award. *This field is only required for Source = 02.* Leave blank if N/A.
6. Click on the Submit command button

Submitting Request to OMB

- After completing all 4 steps in the wizard, the line sequence account is ready to be submitted to BFM.
- Click on the Submit command button.

ID	Line Sequence	Line Sequence Name	Sub Program	Line Seq Type	Report Group	Source	CFDA	Line Item	Fund	Stage Code	Modify Data
196	1667105	test	1301071	OTHER	00	00	10025	1667000	10	ORGN01	Submit

- Choose ORGN02 – OMB Analyst Review and then click the Submit command button.

The image shows a web form with the following elements:

- A dropdown menu titled "Select a Stage:*" with the text "Select a Stage Code" and a downward arrow. The dropdown is open, showing a list of options. The first option, "Select a Stage Code", is highlighted in blue. The second option, "ORGN02 - OMB Analyst Review", is highlighted in white and has a red rectangular box around it.
- A "Submit" button with a red rectangular box around it.
- A checkbox labeled "Generate Email:" which is checked. To its right is the text "Emails all users having access to the submitted stage and org".

Next Steps

- OMB will receive your request and take appropriate action.
- If your line sequence account request is approved, the account will be sent to RIFANS for creation.
- Additionally, if your account is of type payroll, a request will be submitted to assign a legacy account number.