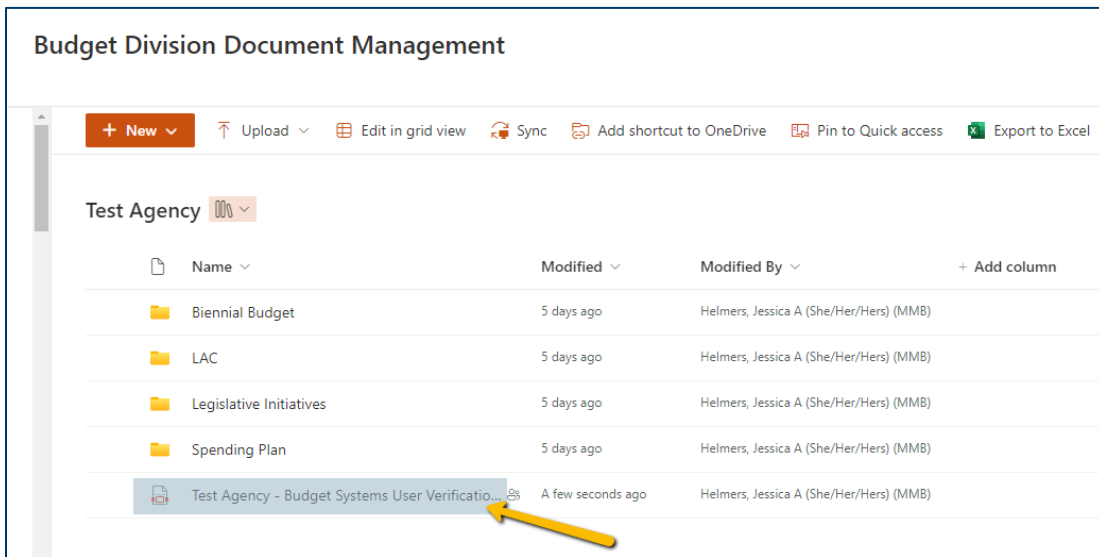


Budget Systems User Verification Process

Located in your agency's main SharePoint folder is a list of your agency's current users for the Budget Planning & Analysis System (BPAS), Capital Budget System (CBS), and MMB Budget Division Document Management SharePoint site.

How to Access Your Agency's User Verification Form

Navigate to the pre-filled PDF file named "Budget-Systems-User-Verification..." (or similar) in the main SharePoint folder for your agency.



You have two options for verifying and/or editing your agency's Budget Systems user list: in your browser window or by downloading a copy to your device.



Recommendation

- **If you have only a few changes:** You can click to edit and save any changes to the file within your browser window.
- **If you have more complex changes (edits) or several users needing to be added or removed:** You can download and edit a saved copy on your device.

Tip: Remember where you save this file and note the file name if using the Download method – this will help with replacing the current version found in the SharePoint folder after you have reviewed your agency’s list of Budget Systems users.

Reviewing Your Agency’s List

1. Review each user listed for your agency and confirm that it is accurate.

No Changes Needed

2. **If no change** is needed, email us (budget.finance.mmb@state.mn.us) with the Subject Line, “Systems Users Verification” or similar indicating that no change is needed.

Adding New Systems Users

3. Check the “New User” checkbox to the left of the user’s name.

| Agency: Budget Systems and Operations (TESTING) | | | |
|--|--------------------|--------------------------------------|-----------------------|
| Budget Director/Coordinator Name: Jessica Helmers | | | |
| New User | Name | State Employee ID or 8-digit User ID | User |
| <input type="checkbox"/> | Jessica Helmers | | jessica.helmers@state |
| <input type="checkbox"/> | Aisha Ahmed | | Aisha.Ahmed@outlook |
| <input type="checkbox"/> | Hiroshi Nakamura | | Hiroshi.Nakamura@ou |
| <input type="checkbox"/> | Miguel Rodriguez | | Miguel.Rodriguez@ou |
| <input type="checkbox"/> | Priya Patel | | Priya.Patel@outlook.c |
| <input checked="" type="checkbox"/> | David Martinez | | David.Martinez@outlc |
| <input type="checkbox"/> | Mei Chen | | Mei.Chen@outlook.co |
| <input type="checkbox"/> | Robert Brown | | Robert.Brown@outloc |
| <input type="checkbox"/> | Linda Wilson | | Linda.Wilson@outlook |
| <input checked="" type="checkbox"/> | Fatima Al-Mansouri | | Fatima.Al-Mansouri@e |
| <input type="checkbox"/> | | | |
| <input type="checkbox"/> | | | |

4. Enter the new user’s: Name, Employee ID (if available), and Email Address.
5. Choose the “Role” from the dropdown and type in the 3-digit agency code for each system the user should have access to:

Agency: Budget Systems and Operations (TESTING)

Budget Director/Coordinator Name: Jessica Helmers Email:

| New User | Name | State Employee ID or 8-digit User ID | User Email | CBS Role | CBS Agency Code |
|--------------------------|--------------------|--------------------------------------|--------------------------------|-----------|-----------------|
| <input type="checkbox"/> | Jessica Helmers | | jessica.helmers@state.mn.us | Agency | A001 |
| <input type="checkbox"/> | Aisha Ahmed | | Aisha.Ahmed@outlook.com | Agency | A001 |
| <input type="checkbox"/> | Hiroshi Nakamura | | Hiroshi.Nakamura@outlook.com | No Acces | A001 |
| <input type="checkbox"/> | Miguel Rodriguez | | Miguel.Rodriguez@outlook.com | No Acces | A001 |
| <input type="checkbox"/> | Priya Patel | | Priya.Patel@outlook.com | Agency | A001 |
| <input type="checkbox"/> | David Martinez | | David.Martinez@outlook.com | Agency | A001 |
| <input type="checkbox"/> | Mei Chen | | Mei.Chen@outlook.com | Agency | A001 |
| <input type="checkbox"/> | Robert Brown | | Robert.Brown@outlook.com | No Access | A001 |
| <input type="checkbox"/> | Linda Wilson | | Linda.Wilson@outlook.com | No Acces | A001 |
| <input type="checkbox"/> | Fatima Al-Mansouri | | Fatima.Al-Mansouri@outlook.com | No Acces | A001 |

6. Repeat for multiple users who need system access.

Tip: If you need more room to add users, download a blank [Budget Systems User Authorization Form](#) from the Statewide Budget Systems webpage.

Removing Systems Users

7. Check the *Remove All System Access* checkbox if the user should be removed from ALL systems (BPAS, CBS, and MMB Budget Division SharePoint Site).

Agency: Budget Systems and Operations (TESTING)

Budget Director/Coordinator Name: Jessica Helmers Email: jessica.helmers@state.mn.us

| New User | Name | State Employee ID or 8-digit User ID | User Email | CBS Role | CBS Agency Code | BPAS Role | BPAS Agency Code | SharePoint Role | Share-Point Agency Code | Remove All Systems Access |
|-------------------------------------|--------------------|--------------------------------------|--------------------------------|------------|-----------------|-------------|------------------|-------------------------|-------------------------|-------------------------------------|
| <input type="checkbox"/> | Jessica Helmers | | jessica.helmers@state.mn.us | Agency | A001 | Agency | A001 | Agency Legislative Init | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Aisha Ahmed | | Aisha.Ahmed@outlook.com | Agency | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Hiroshi Nakamura | | Hiroshi.Nakamura@outlook.com | No Acces | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Miguel Rodriguez | | Miguel.Rodriguez@outlook.com | No Acces | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Priya Patel | | Priya.Patel@outlook.com | Agency | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | David Martinez | | David.Martinez@outlook.com | Agency | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Mei Chen | | Mei.Chen@outlook.com | Legislativ | A001 | Legislative | A001 | Gov Office Policy Adv | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Robert Brown | | Robert.Brown@outlook.com | Agency | A001 | Agency | A001 | Agency | A001 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Linda Wilson | | Linda.Wilson@outlook.com | No Acces | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Fatima Al-Mansouri | | Fatima.Al-Mansouri@outlook.com | No Acces | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |

8. If a user should be removed from a single system, select the "No Access" option from the Role dropdown menu, and delete the agency code.

Budget Systems User Authorization Form

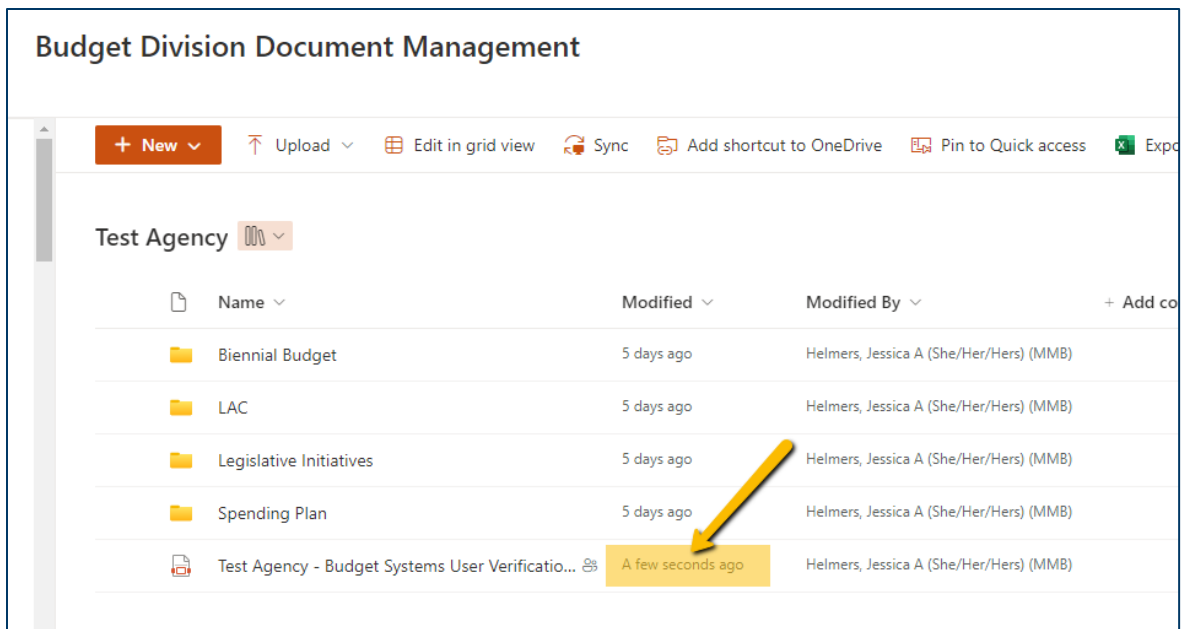
Agency: Budget Systems and Operations (TESTING)

Budget Director/Coordinator Name: Jessica Helmers Email: jessica.helmers@state.mn.us

| New User | Name | State Employee ID or 8-digit User ID | User Email | CBS Role | CBS Agency Code | BPAS Role | BPAS Agency Code | SharePoint Role | SharePoint Agency Code | Remove All Systems Access |
|--------------------------|--------------------|--------------------------------------|--------------------------------|-------------|-----------------|-------------|------------------|------------------------------|------------------------|-------------------------------------|
| <input type="checkbox"/> | Jessica Helmers | | jessica.helmers@state.mn.us | Agency | A001 | Agency | A001 | Agency Legislative Initiator | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Aisha Ahmed | | Aisha.Ahmed@outlook.com | Agency | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Hiroshi Nakamura | | Hiroshi.Nakamura@outlook.com | No Access | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Miguel Rodriguez | | Miguel.Rodriguez@outlook.com | No Access | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Priya Patel | | Priya.Patel@outlook.com | Agency | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | David Martinez | | David.Martinez@outlook.com | Agency | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Mei Chen | | Mei.Chen@outlook.com | Legislative | A001 | Legislative | A001 | Gov Office Policy Advisor | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Robert Brown | | Robert.Brown@outlook.com | No Access | A001 | No Access | A001 | Agency | A001 | <input checked="" type="checkbox"/> |
| <input type="checkbox"/> | Linda Wilson | | Linda.Wilson@outlook.com | No Access | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |
| <input type="checkbox"/> | Fatima Al-Mansouri | | Fatima.Al-Mansouri@outlook.com | No Access | A001 | Agency | A001 | Agency | A001 | <input type="checkbox"/> |

- Repeat for multiple users who need access removed.
- Save changes to the PDF with your agency's user list in the browser or upload your saved file.

- Reload your browser window or refresh your agency's folder page and confirm that those changes have been successfully updated.



Timely certification of your agency users will ensure that your team has appropriate systems access for the Biennial Budget process.

Questions

If new Budget Systems users need to be added after the User Verification due date, download and send a new Budget Systems Authorization Form to MMB Budget Operations at budget.finance.mmb@state.mn.us.

Contact us at budget.finance.mmb@state.mn.us, if you have questions about the user verification process or system roles.

- **Note:** The Fiscal Note Tracking System (FNTS) access and authorization is administered by the [Legislative Budget Office](#). Appropriation Maintenance Application (AMA) security access and roles are tied to the security for the State of Minnesota accounting system, [SWIFT](#).