

# FY 2020-21 Budget Narrative Instructions

## June 2018

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# Budget Structure and Selecting Narrative Templates

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These instructions are intended to provide information for preparing 2020-21 biennial budget submissions by providing guidance on how to present your budget based on your agency's budget structure.

## ***How is budget structure used?***

Agency budget books, narratives and fiscal reports are organized around an agency's budget structure as established in the accounting system, SWIFT. Each agency has a budget structure to define how it plans and manages its work, allocates resources, and achieves and reports on results. It serves as an important tool, used by the governor and legislature in making decisions about allocating resources and in measuring agency success in achieving goals.

Changes to your agency budget structure need to be reviewed and approved by your executive budget officer (EBO) prior to entry into the Appropriation Maintenance Application (AMA) for accounting system - SWIFT or the Budget Planning and Analysis System (BPAS). If a new budget program or activity is being added, the agency must submit the [Budget Structure Change Form](http://mn.gov/mmb-stat/documents/swift/forms/budget-structure-changes.xlsx) (<http://mn.gov/mmb-stat/documents/swift/forms/budget-structure-changes.xlsx>) to their executive budget officer (EBO). ***These changes must be submitted to your EBO prior to August 1.***

**Agencies not making changes to their budget structure or presentation should start with the budget narratives published with the 2018-19 budget document.** The 2018-19 narratives are updated for template changes and 2017 data in the profile pie and bar charts. These updated narratives are uploaded to the [MMB Budget Division Document Management SharePoint Site](https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx) (<https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>) under your agency's folder: Biennial Budget/2020-21 Biennial Budget/Background Narratives/2018-19 Narratives. If your agency did not use data from the Budget Planning and Analysis System (BPAS) or the consolidated fund statement to populate the pie and bar charts, your agency will need to update its own charts.

## ***How do I choose a presentation structure?***

You must determine how your agency's budget should be presented. Each agency is required to complete an Agency Profile or Small Agency Profile. The Small Agency Profile is for "small" agencies that perhaps only have one program and budget activity or do not use the SWIFT accounting system. Small agencies do not need to complete a Program or Budget Activity Narrative.

The larger agencies must complete the Agency Profile, and Program or Budget Activity Narrative templates. In order to reduce duplication, agencies may choose to report information at the program level or the budget activity level. You should make this decision based on your agency's program and budget activity structure, how results are measured, and how resources are allocated. Please consult with your EBO to decide which level is the most informative for your agency. Once the decision has been made, agencies will need to complete one template for each program or budget activity.

### **Presentation options include:**

- Small Agency Profile only
- Agency Profile + Budget Program Narratives
- Agency Profile + Budget Activity Narratives
- Agency Profile + combination of Budget Program and Budget Activity Narratives

MMB has developed several templates to allow flexibility in agency's budget presentations. There are two different templates available for both the Agency Profile and the Small Agency Profile. The only difference between the two templates is the pie charts. One displays Spending by Program, and the other displays Spending by Category. Choose the one that best presents your agency's budget information. For example, if your agency only has one budget program, the Spending by Program would not be an informative graph. In this case, the Spending by Category would be a better choice.

## **Resources**

- The 2018-19 published budget narratives with updated Microsoft Word templates and the profile pie chart and bar charts updated with FY 2017 data are uploaded to your agency's folder on the [Budget Division Document Management SharePoint Site](https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx) (<https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>) under the agency's folder: Biennial Budget/2020-21 Biennial Budget/Background Narratives/2018-19 Narratives.
- Budget structure reports for BPAS are located in each agency's folder on the [Budget Division Document Management SharePoint Site](#) under the agency's folders: Biennial Budget/2020-21 Biennial Budget/Background Narratives/Reference Materials.
  - Agency Budget Structure are the programs and activities for the agency with each appropriation, fund and type as it is currently assigned in the Budget Planning and Analysis System (BPAS).
- All budget narrative instructions and templates can be found on [MMB's website](#) (<http://mn.gov/mmb/budget/budget-instructions/bibudprep/>).
- Contact your agency's assigned EBO with questions or email [budget.finance.mmb@state.mn.us](mailto:budget.finance.mmb@state.mn.us).

# Completing the Budget Charts in the Agency Profile

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## ***Overview of Templates***

For both the Agency Profile and Small Agency Profile, there are two templates available. The only difference between the two templates is the pie charts. One displays Spending by Program, and the other displays Spending by Category. Choose one that best presents your agency's budget information. For example, if your agency only has one budget program, the Spending by Program would not be an informative graph; therefore, the Spending by Category would be a better choice.

## ***Data for the Pie Charts***

**For agencies who used BPAS data to complete the pie chart for the 2018-19 agency profile the pie chart is updated with FY 2017 data.** If you would like to review the data used to complete the charts, the spending by category and spending by program data for each agency is uploaded to your agency's folder on the [Budget Division Document Management SharePoint Site](https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx) (<https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>) in the Biennial Budget/2020-21 Biennial Budget/Background Narratives/Reference Materials. The Excel spreadsheet is labeled "Narrative Pie Chart Spending by Category and Program. Use this report to review or complete your pie chart data based on either category or program within your narrative. The data for the pie chart is entered directly into the chart embedded in the budget narrative Word document template.

The source of the data for the pie charts is BPAS. The data was loaded with FY 2017 close data in August 2017 and includes any reconciliation the agency completed after load. The purpose of the charts in the narratives is to provide readers with a high level overview of your agency's budget, displaying percent spending by category or program. The intent is for the data to present an accurate summary level display of your agency's FY 2017 spending.

## ***Data for the Historical Spending Bar Chart***

**For agencies who used consolidated fund statement data to complete the bar chart for the 2018-19 agency profile, the bar chart is updated with FY 2016-17 data.** If you would like to review the data used to complete to complete the historical spending bar chart, the Excel spreadsheet labeled "Narrative Bar Chart Spending by Fund.xlsx" is uploaded to each agency's folder on the [Budget Division Document Management SharePoint Site](https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx) (<https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>) in the Biennial Budget/2020-21 Biennial Budget/Background Narratives/Reference Materials. The Narrative Bar Chart Spending by Fund report contains general fund, federal fund and other funds spending by fiscal year for 2006-2017. The source of the data is historical consolidated fund statements for FY 2006 through FY 2011, and then BPAS for FY 2012-17. "Other Funds" does not include data for funds not included in the consolidated fund statement. The data for your agency may be entered directly into the chart embedded in the budget narrative Word document template. Instructions are on the first tab of the Excel workbook.

## ***Non-SWIFT Data***

Agencies that do not use the state accounting system (SWIFT) may use data from their accounting system to populate the budget charts on the narratives. The source of the data must be noted in the footnotes section under the budget charts. Please also provide your EBO with a copy of the source data reports.

# Statewide Outcomes and Results Based Accountability

The biennial budget narrative documents are statutorily required to provide information on performance. As a resource for agencies, the following provides an overview of how Results Management and the Results Based Accountability (RBA) framework may be applied to the budget narrative documents. Use of this framework in biennial budget narratives and change items is not required. Instead, it is intended to serve as one way your agency could approach performance measurement that is easily accessible and understandable.

RBA Concept	Use in the Biennial Budget document
<p><b>Population Accountability</b> is about the well-being of whole populations. We understand population accountability through:</p> <ul style="list-style-type: none"> <li>• Outcomes - A condition of well-being for children, adults, families or communities <b>Example: People in Minnesota are safe</b></li> <li>• Indicators – A measure which helps quantify the achievement of a result. <b>Example: The juvenile crime rate</b></li> </ul> <p>The state’s population accountability outcomes and indicators are found on the <a href="http://mn.gov/mmb/mn-dashboard/">Statewide Dashboard</a> (<a href="http://mn.gov/mmb/mn-dashboard/">http://mn.gov/mmb/mn-dashboard/</a>)</p>	<p>Used in the <b>Agency Profile</b> in the “<b>Purpose</b>” section.</p> <p>Agencies explain their role in contributing to population accountability by describing which of the state’s eight outcome areas they impact.</p>
<p><b>Performance Accountability</b> is about the well-being of client populations. We understand performance accountability through a performance measure of how well a program, agency, or service system is working. <b>Example: The percent of children exiting juvenile custody with no repeat offence after six months</b></p> <p>There are three types of measures:</p> <ol style="list-style-type: none"> <li>1. How much did we do?</li> <li>2. How well did we do it?</li> <li>3. Is anyone better off?</li> </ol>	<p>Used in the <b>Agency Program, Budget Activity Narrative</b>, and <b>Small Agency Profile</b> in the “<b>Results</b>” section.</p> <p>Agencies should identify three to five performance measures for each program or budget activity.</p>
<p><b>“Turning the Curve.”</b> Doing a “turn the curve” exercise is intended to identify strategies to impact a population indicator or performance measure. For example:</p> <ul style="list-style-type: none"> <li>• “Turning the curve,” or increasing the percent of students that graduate (Population level)</li> <li>• “Turning the curve,” or increasing the percent of workforce program participants that retain a job (program-level)</li> </ul>	<p>Used for <b>Change Items</b> where an agency seeks to impact a specific population indicator or a specific program-level performance measure. These population indicators or performance measures do not have to be linked to an indicator on the dashboard, or an existing performance measure for a program or budget activity.</p>

## Identifying Performance Measures in Budget Narratives

The program/budget activity narrative and the small agency profile ask you to describe the key items of data you use to measure successful outcomes or determine progress. You have two options to display performance measure data:

**Option 1:** The templates include a performance measure table to identify the measure, the most recent previous data point and the current data point, and the five- year trend (is it stable, improving, or worsening)?

**Option 2:** If your agency has produced its own charts and graphs that demonstrate trends, you may include them in the document in place of the performance measures table.

**Choosing Performance Measures.** For each program or budget activity, agencies should list three to five performance measures.

- Performance measures should be directly related to the program and/or activity goals and strategies with an emphasis on serving the program/activity’s customers.
- Performance measures should incorporate significant aspects of program/activity operations.

*The Results-based Accountability Framework Identifies Three Kinds of Performance Measures*

<b>Quantity: How much did we do?</b>	<b>Quality: How well did we do it?</b>	<b>Result: Is anyone better off?</b>
Counts customers served and activities performed, and are generally associated with agency workload or effort.	Demonstrates how well the activities were performed, and usually measures efficiency, timeliness, accuracy, workload ratios, unit cost, staff turnover, etc.	Shows the extent to which your customers are better off. This usually has to do with improved skills, knowledge, attitude, behavior, customer satisfaction, or life situation.
Example: Number of children in foster care.	Example: Average number of changed foster care placements per child.	Example: Percentage of children in stable permanent placement after 6 months in care.
Example: Number of MFIP clients provided job training.	Example: Percentage of MFIP clients with child care and transportation needs met.	Example: Percentage of MFIP clients employed 6 months after completion.
Example: Number of job applicants processed.	Example: Average recruitment period.	Example: Non-promotion workforce turnover rate.

## Using a “Turn the Curve” Exercise in the Change Item Process: What curve do you want to turn?

During this biennial budget process, agencies may choose to use a modified “turn the curve” exercise format from the Results-based Accountability framework to explain the rationale for the change item and describe the proposal. The “turn the curve” exercise provides a framework for illustrating the intended impact of a change item, by identifying a data trend you would like to change through the change you are requesting in the biennial budget.

Whereas in the budget narratives you will identify program performance measures for existing programs, the change item will ask you to identify the population indicator or program performance measure that the change item is intended to impact. For example:

- At the **population** level: A proposal that’s intended to reduce the rate of teen pregnancy in the state

- At the **program** level: A proposal that's intended to increase the job retention rate of a workforce program

If your proposal does not identify a data trend or other baseline that your request is intended to impact, you may instead include the following information:

- Why is this change item a priority for the agency?
- What will happen as a result of getting the change item enacted? What condition will improve?
- What are the consequences of not enacting the change item?

### **Selecting population indicators or performance measures for the change item narrative**

If you choose to use a “turn the curve” exercise to explain a change item request, the first step will be identifying the population level indicator, or program level performance measure that you want to impact. The process for selecting a population indicator or performance measure for the change item narrative should follow a similar process as that you'll use to identify performance measures on the program or budget activity narrative.

For **population accountability efforts** that you're targeting through the change item, consider the following in identifying a corresponding population indicator:

- *Communication Power.* Does the indicator communicate to a broad range of audiences? Is it easy for a layperson to understand?
- *Proxy Power.* Does the indicator say something of central importance about the result you're trying to achieve?
- *Data Power.* Is there quality data available on a timely basis to help you understand the state of the indicator?

For **program performance accountability efforts** that you're targeting through the change item, consider the following questions to determine the appropriate performance measure (see page 2 of these instructions for more examples):

- *Quantity: How much did we do?* Counts customers served and activities performed, and are generally associated with agency workload or effort.
- *Quality: How well did we do it?* Demonstrates how well the activities were performed, and usually measures efficiency, timeliness, accuracy, workload ratios, unit cost, staff turnover, etc.
- *Results: Is anyone better off?* Shows the extent to which your customers are better off. This usually has to do with improved skills, knowledge, attitude, behavior, customer satisfaction, or life situation.

<b>Population Indicator Examples</b>	<b>Performance Measure Examples</b>
Incidents of child maltreatment per 1,000 children	Percent of children in stable permanent placement after 6 months in care
Juvenile crime rate	Percent of children exiting custody with no repeat offence after six months
Unemployment rate	Percent of program participants employed 6 months after program completion

# Plain Language and Style

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Agencies must use plain language when writing their budget narratives to help Minnesotans understand your agency's mission, purpose and activities. Below are some tips on how use plain language specifically for the budget narratives.

## ***Plain Language***

### **What is Plain Language?**

A document is in plain language when the reader can find what they need, understand what they find, and use what they find to meet their needs on the first try.

### **How do I write in Plain Language?**

#### **Plan**

- Explain your purpose
- Know you reader. Your readers are legislators, legislative staff, executive branch staff, and Minnesotans. Your document should provide an objective, factual description of your agency's mission, goals, activities, and results to these audiences.

#### **Organize**

- Determine your key message
- Only include essential information, facts, data and details
- Answer your readers anticipated questions
- Determine a logical sequence of information

#### **Write**

- Use short sentences. If your reader has to read the sentence more than once to understand it, rewrite it!
- Use active descriptive words
- Use active voice
- Use your readers words
- Avoid jargon and legalese

#### **Edit**

- Use lists and tables
- Use acronyms sparingly. If you must use them, spell them out the first time they are used in each document.
- Remove unnecessary words
- Watch for white space

#### **Review**

- Have someone unfamiliar with the document review it for understanding.

## ***Style and Formatting Requirements***

### **Narrative Style**

- Use concise descriptions

### **Audience**

The budget narrative documents are intended to provide an objective, factual presentation of your agency's mission, goals, activities and results. They are not intended to justify budget requests or decisions, or discuss results of budget cuts. The audience includes legislators, legislative staff, executive branch staff and the public at large.

### **Acronyms**

If you must use acronyms, spell them out the first time they are used in each document.

### **Bullets and Numbers**

If using bullets or a numbered list, use the feature on the home ribbon instead of typing the bullet or number. If multiple levels of bullets are used, a solid black circle is used for the first level (●) and a dash is used for the second level (-)

### **Styles**

The template has been set with specific styles for headings and paragraphs for accessibility purposes; do not change the style or font.

### **Additional Information**

- If you have supporting information your agency's website, include a link.
- For accessibility purposes, web links must include the full URL (http://www.---).
- If you are going to link text to a website (e.g., statutory reference), you will need to include the full URL in parentheses following the linked text. For example, "Pursuant to [M.S. 16A.127](https://www.revisor.mn.gov/statutes/?id=16A.127) (https://www.revisor.mn.gov/statutes/?id=16A.127)..."
- Never use "click here" as a description for a text link.

### **Don't**

- Use custom styles
- Use text boxes
- Adjust the margins of the document
- Use section breaks
- Change the headers or footers on the templates
- Hyphenate words.

### **Page Limits**

- Agency profiles should not exceed 2-3 pages
- Program or budget activity narratives should be limited to 1 -2 pages each
- Small programs and budget activities should be 1 page.

# Creating Accessible Documents

The budget document must be produced in an accessible format. Instructions on steps you must take to make your budget narratives accessible are provided below, including an accessibility checklist. Your agency's accessibility officer should also review your budget narratives before submitting them to MMB. Once we receive your completed narratives we will evaluate them using an accessibility checker. If accessibility errors are found, the documents will be returned to you for correction.

Use the following links to access the MINNESOTA STATE DOCUMENT ACCESSIBILITY REFERENCE GUIDE for both Office 2010 and Office 2013:

[Minnesota State Document Accessibility Reference Guide for Office 2010](http://mn.gov/mnit/assets/Minnesota-State-Accessible-Documents-Reference-Guide_tcm38-62559.pdf)

[http://mn.gov/mnit/assets/Minnesota-State-Accessible-Documents-Reference-Guide\_tcm38-62559.pdf]

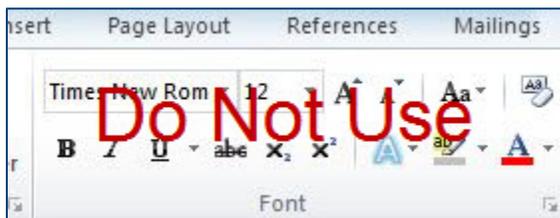
[Minnesota State Document Accessibility Reference Guide for Office 2013](http://mn.gov/mnit/assets/MinnesotaStateAccessibleDocumentReferenceGuide2013_tcm38-223313.pdf)

[http://mn.gov/mnit/assets/MinnesotaStateAccessibleDocumentReferenceGuide2013\_tcm38-223313.pdf]

## Instructions

### Formatting Text

- Do not edit font and size, as the templates have been set with the font and size for consistent budget pages across agencies.
- Do not give styles new names. Screen readers ONLY recognize existing MSWord style names. For example, do not change "Heading 2" into "Budget 2".
- Do not use the tools in the Font group to make text look like headings or other styles.



- If you need to format text, do so using the styles menu



## How to Copy and Paste information into the template

There are some changes to this year's template. It is ok to copy and paste information into the template. **Follow these instructions** to maintain the document format:

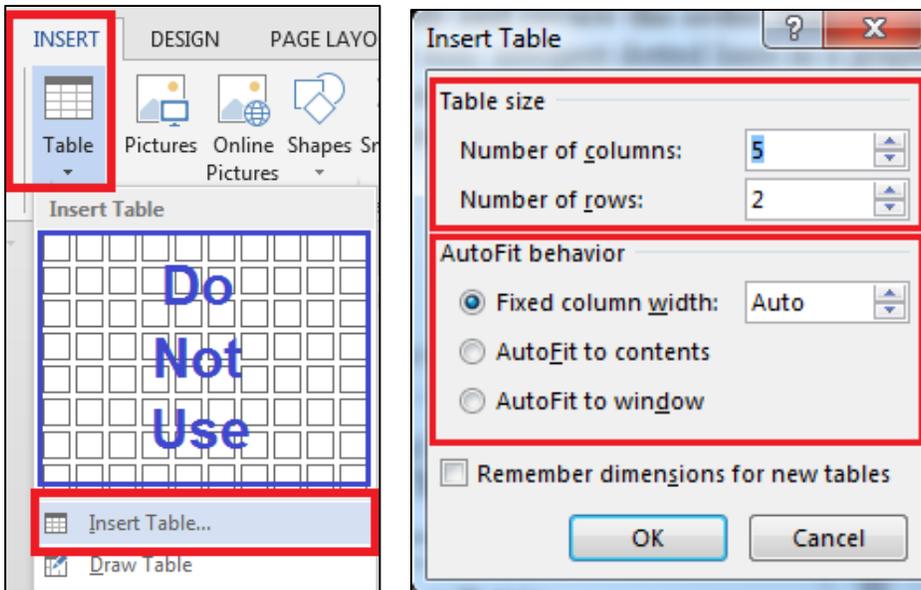
1. Copy the information from the source.
2. Right-click on the document where you want the information to be placed.
3. Choose either **Keep Text Only** (for text) or **Use Destination Theme** (or Use Destination Style for graphs, charts, etc.). Do **not** use Ctrl + v to paste the content.



## Inserting a Table

1. On the Insert tab, select the Table button
2. Select Insert Table
3. Enter the number of columns and rows you want, choose the AutoFit behavior, and click OK

*Please do not be tempted to use the Draw Table tool. Although it is convenient, this tool does not create an accessible table. You must select Insert Table instead.*



## Charts

There are two ways of adding a chart that is not part of the template.

- Import the chart from the originating program (Excel or other program)
- As an image

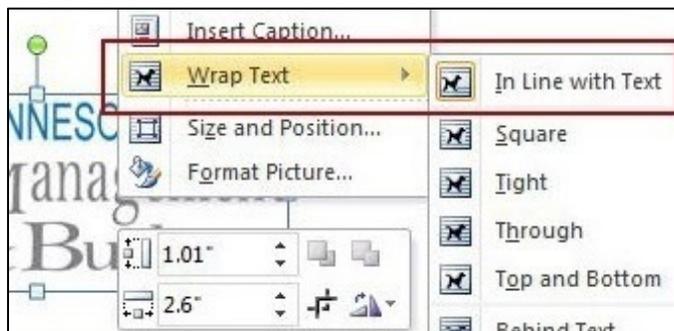
Please follow these guidelines for good accessibility:

- Make sure the colors have good contrast in both color and black and white (print the chart to check contrast in grayscale). If using Microsoft Office, **do not** use the default colors. For ease of accessibility, use a built-in monochromatic color scheme. These documents are viewed both online and in print, so good contrast in both formats is important.
- If using an image of a chart:
  - Make sure the image is very clean. Images that are pixelated or blurry are difficult to read and look unprofessional.
  - Use the built in Snipping Tool to get a clean screen shot of the original chart.
- Images of charts must be placed **In Line** (see next section)
- Add good **Alternate Text** to the chart (see next section)

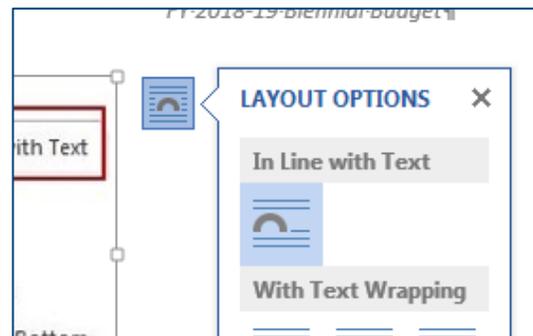
## Images

1. Use **In Line** with Text
  - a. Right click on the image
  - b. Hover over the **Wrap Text** selection
  - c. Click on **In Line with Text**

Office 2010:



Office 2013:



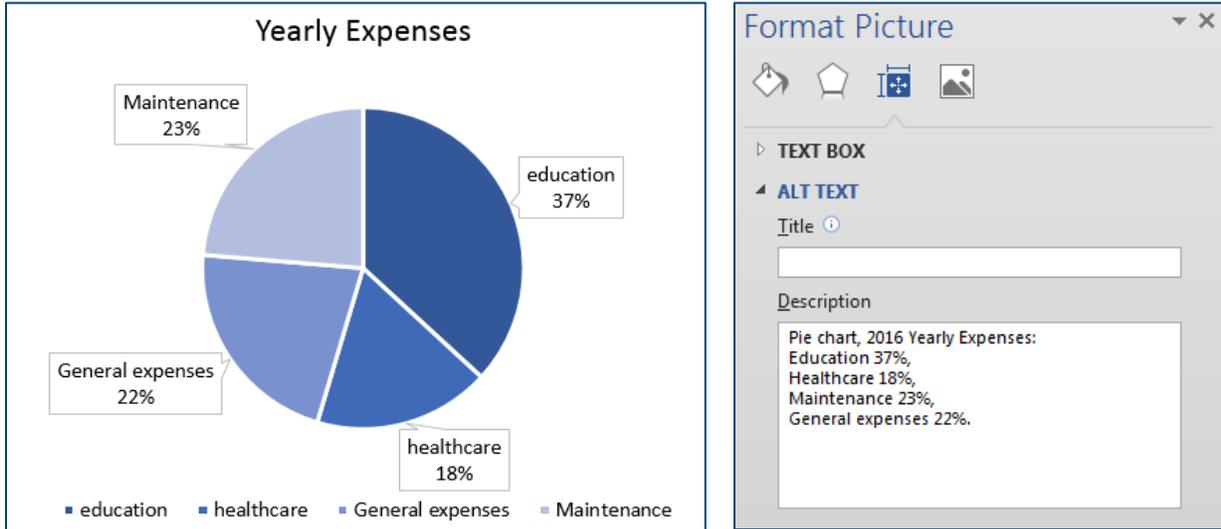
2. Add Alt Text to your image/chart

Alt text is used by people who are blind or deaf/blind who use screen or braille readers. Because they are unable to see the image, we must fully describe it to them.

### General guidelines for alt text:

- Use clear, concise language. Try to not type more than 180 characters (not always possible)
- If the image is a chart, start description with the type of chart. If the image is not a chart, do not start your alt text with "image of" or "picture of"
- If you have a full description of the image in your text, refer to the text
- For graphs and charts, put the tabular information into the alt text. Use punctuation to separate groups of items and values (see "Good alt text" below). One option for large charts with multiple

data points is to place a link to the original table in the text of the document. The alt text can then summarize the chart in one sentence and refer to the link in the body text.



Examples:

**Poor Alt Text:**

Pie chart of yearly expenses

OR:

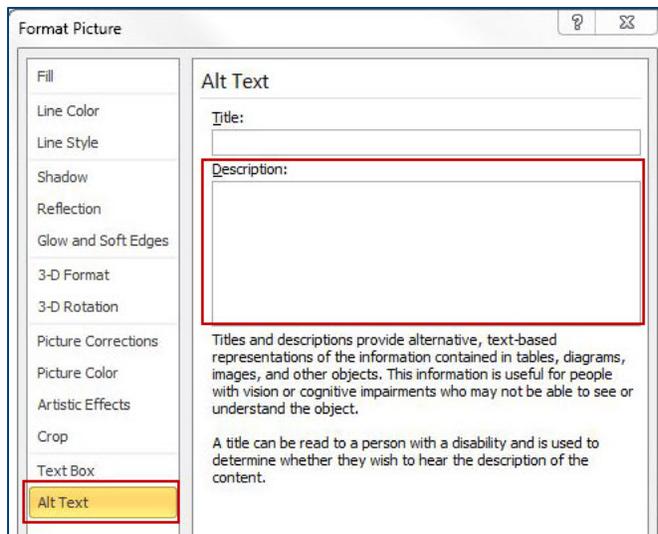
This is a picture of a chart that has all of the yearly expenses we expect to pay every year. It has education, healthcare, general expenses, and maintenance costs.

**Good Alt Text:**

Pie chart, 2016 Yearly expenses: Education 37%, Healthcare 18%, Maintenance 23%, General expenses 22%.

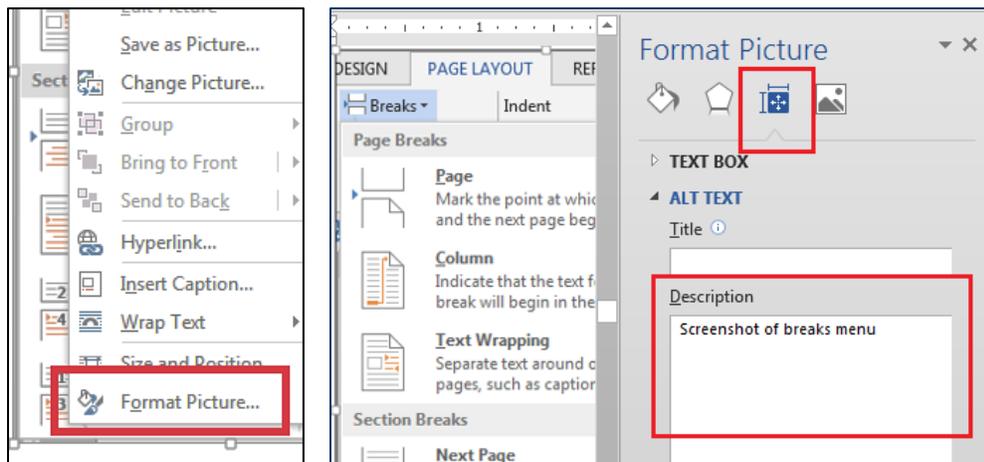
For Microsoft Office 2010:

1. Right click on the image
2. Click on format picture
3. Select Alt Text



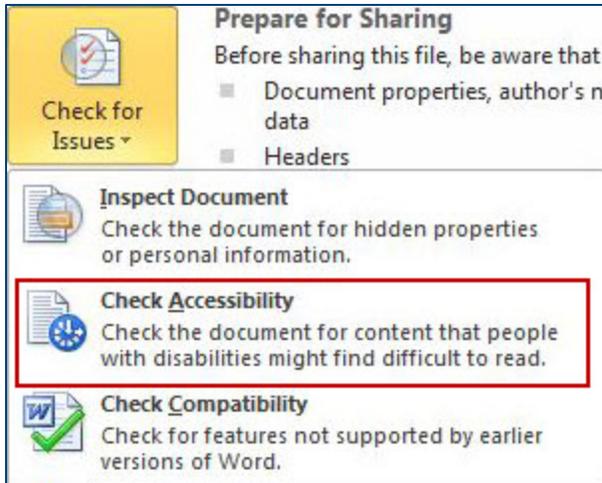
For Microsoft Office 2013:

1. After inserting your image, right-click on it, and choose **Format Picture to open the Format Picture Pane (Alt + JP + O)**.
2. Click on the **Layout & Properties** icon and then select **Alt Text**.
3. Only use the **Description** field. Do **not** type in the Title field.

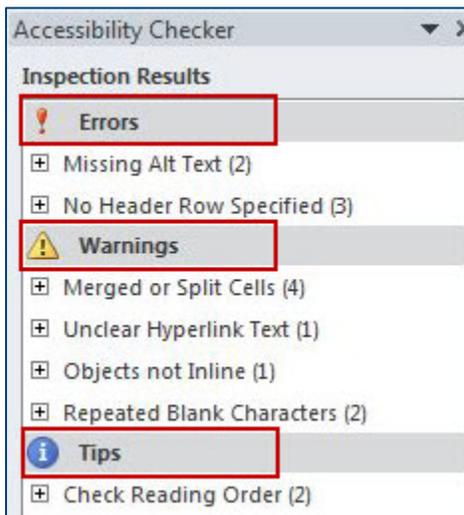


Using the Accessibility Checker

On the **File** tab, select the **Check for Issues** button and then on **Check Accessibility**. Your document opens up with the **Accessibility Checker** dialog box.



1. The **Additional Information** dialog box is located at the bottom of the **Accessibility Checker**. This box explains why a problem exists and how to fix it.



- All Errors must be corrected in order to create an accessible document
  - Exceptions:
    - Tables do not need alt text
    - Single cell tables used in place of a text box does not need a header row specified
- Warnings show content that may pose a problem for people with disabilities. Fix all warnings that create potential problems for users.

## Checklists

### Agency Profile

- Update the alt text title and description for both charts. Ensure the description you provide describes the data within the charts for your agency.
- Run accessibility checker. Fix any errors.
- Send document to your agency's accessibility officer for review.

## Small Agency Profile

- Update the alt text title and description for both charts. Ensure the description you provide describes the data within the charts for your agency.
- If you are following Option 1 for the Results section, did you follow the instructions above for “Importing information from other sources (Copy and Paste),” and “Using Images”?
- If you are following Option 1, be sure to add an alt text to graphic.
- If you are following Option 2 for the Results section, update the alt text title and description for the table. Ensure the description you provide describes the data within the performance measurement table.
- Run accessibility checker. Fix any errors.
- Send document to your agency’s accessibility officer for review.

## Program/Budget Activity Narratives

- If you are following Option 1 for the Results section, did you follow the instructions above for “Importing information from other sources (Copy and Paste),” and “Using Images”?
- If you are following Option 1, be sure to add an alt text to graphic.
- If you are following Option 2 for the Results section, update the alt text title and description for the table. Ensure the description you provide describes the data within the performance measurement table.
- Run accessibility checker. Fix any errors.
- Send document to your agency’s accessibility officer for review.

## Agency Change Item Narratives

- Update the alt text title and description for the Fiscal Impact table.
- If you are using your own charts or graphics for the Result section, did you follow the instructions above for “Importing information from other sources (Copy and Paste),” and “Using Images”?
- Be sure to add an alt text to the chart of graphic that you’ve imported.
- Run accessibility checker. Fix any errors.
- Send document to your agency’s accessibility officer for review.

# Using SharePoint for Document Submission

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## ***Establishing User Access***

Each agency has an agency secured folder on the MMB Budget Division Document Management SharePoint site (<https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>). Agency staff will need to request access to the site by submitting a [Budget System User Authorization Form](#). Completed forms should be submitted to [budget.finance.mmb@state.mn.us](mailto:budget.finance.mmb@state.mn.us). Access is granted to agency users based on two types of access, Agency or Agency Legislative Initiatives. Please contact MMB if there are questions on which access a user may need.

Questions related to the use of SharePoint for submission of documents should be emailed to [budget.finance.mmb@state.mn.us](mailto:budget.finance.mmb@state.mn.us).

## ***Narrative Templates***

All narrative templates can be found on [MMB's website](http://www.mn.gov/mmb/budget/budget-instructions/bibudprep/) (<http://www.mn.gov/mmb/budget/budget-instructions/bibudprep/>)

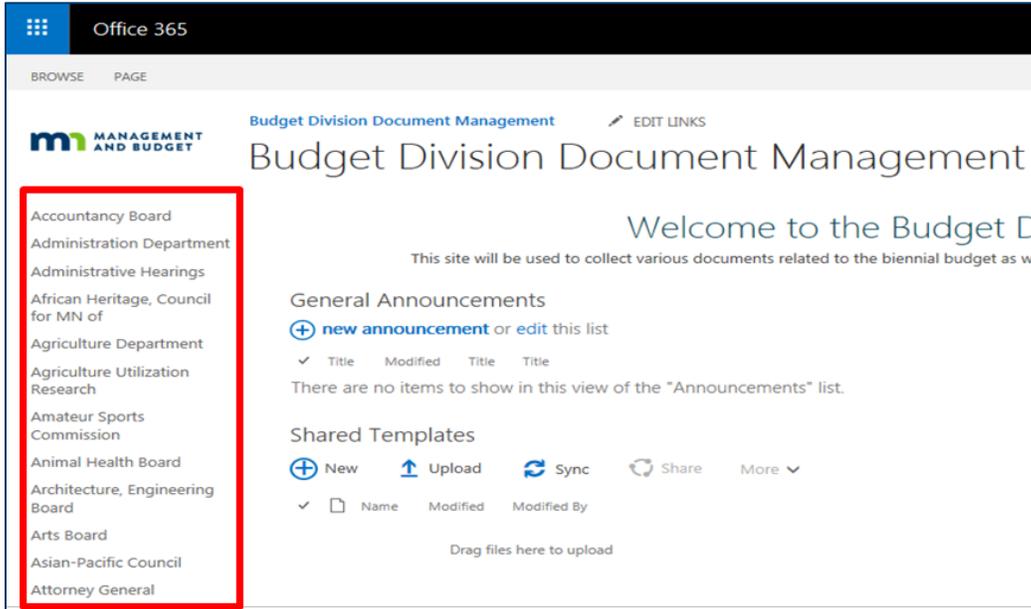
## ***Instructions***

*Agencies must submit their budget narrative documents by uploading completed documents to the MMB Budget Division Document Management SharePoint site, as instructed in the Biennial Budget Instructions. Remember that once something has been posted to SharePoint, MMB considers this document as the final agency submission. If agencies have corrections or changes needed to a document after upload, they will need to work with their EBO to have those changes made.*

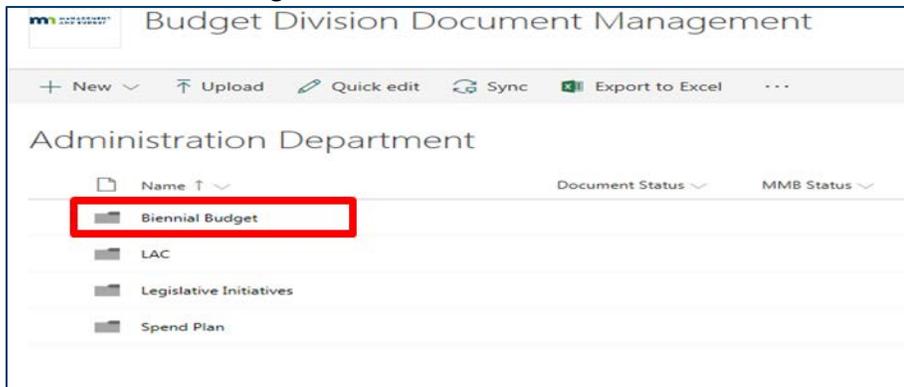
For more instructions on SharePoint functionality, refer to the SharePoint Reference Guide (<https://mn.gov/mmb-stat/documents/budget/budget-instructions/sharepoint-instructions.pdf>).

## Uploading a Document to SharePoint

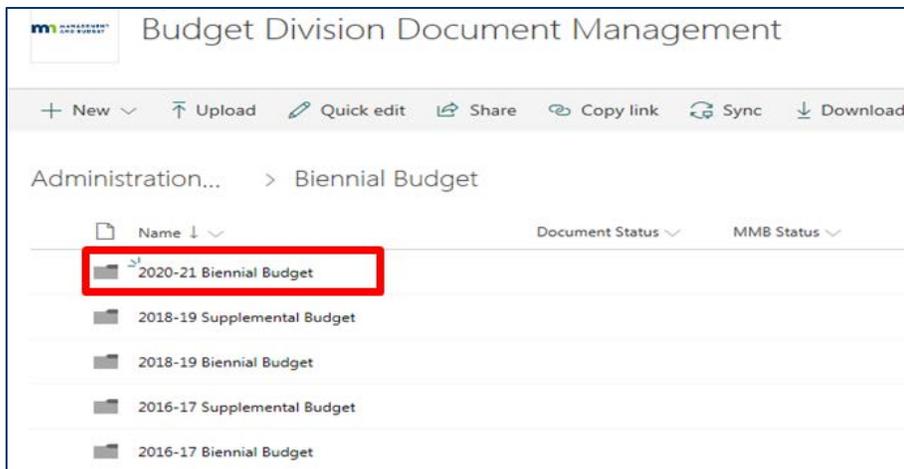
1. Open a web browser and go to the Budget Division Document Management SharePoint site URL: <https://mn365.sharepoint.com/sites/MMB-Budget/SitePages/Home.aspx>. If prompted, log in with your employee ID and password.
2. Select your agency from the menu on the left-hand side of the page.



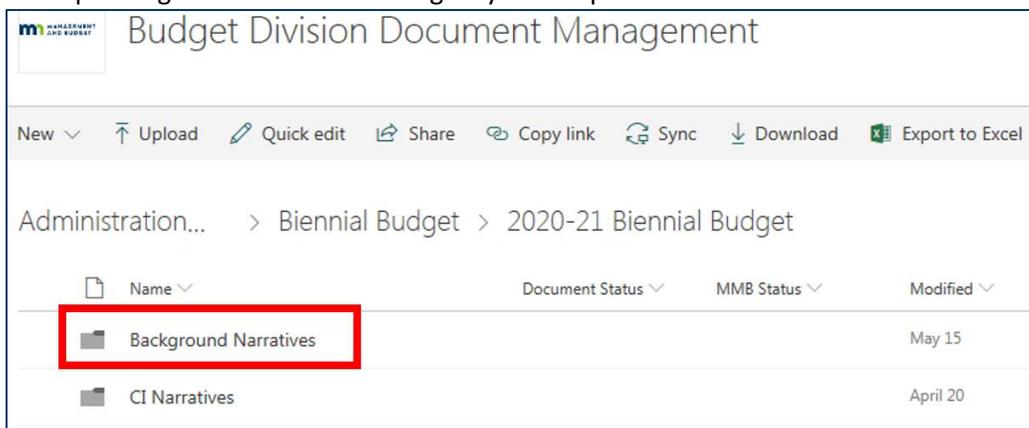
3. Select the Biennial Budget folder



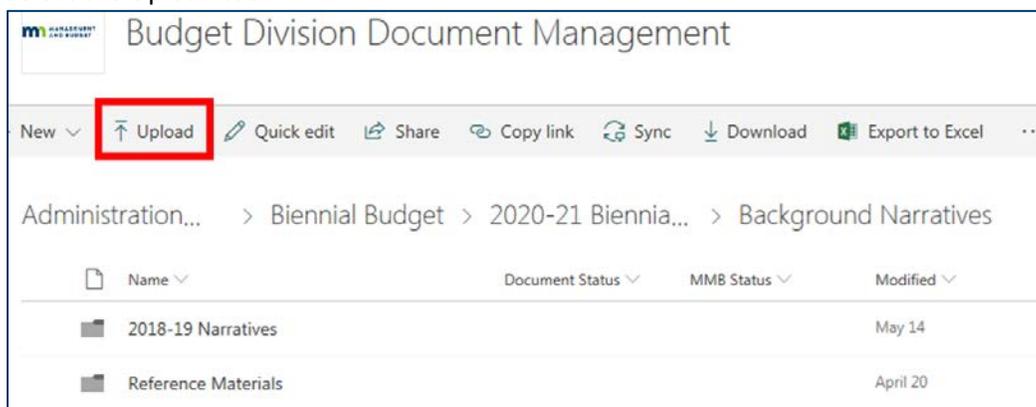
4. Select the 2020-21 Biennial Budget folder



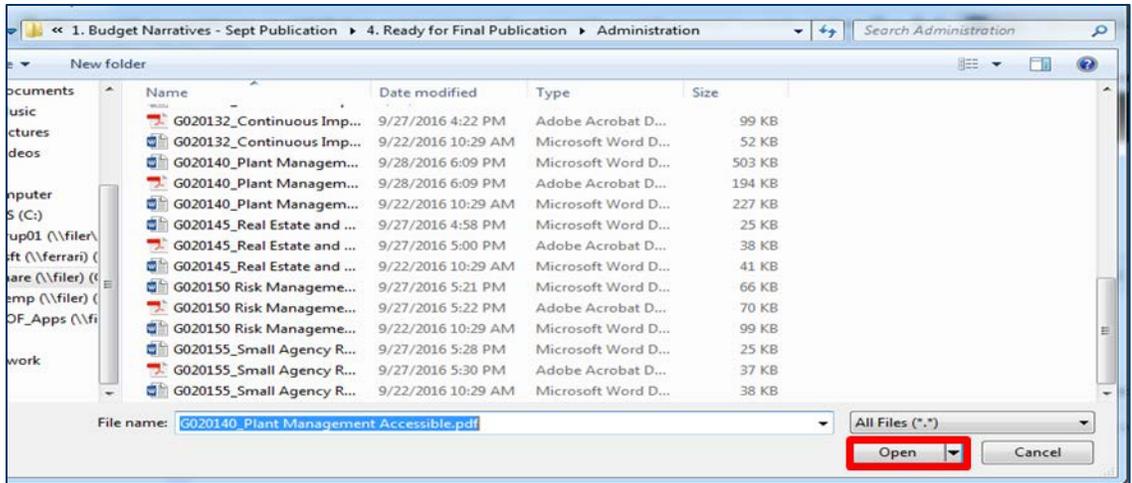
5. Select the Background Narratives folder. This is the folder where agencies will upload their final submitted budget narratives. Also within the Background Narratives folder are folders called 2018-19 Narratives and Reference Materials, which have information that will help agencies prepare their narratives, i.e., 2018-19 published budget narratives in the new templates and 2017 spending information for the Agency Profile pie and bar charts.



6. Select the Upload tool



7. Search your computer for the document or documents you wish to upload to the SharePoint site. Click the Open button.

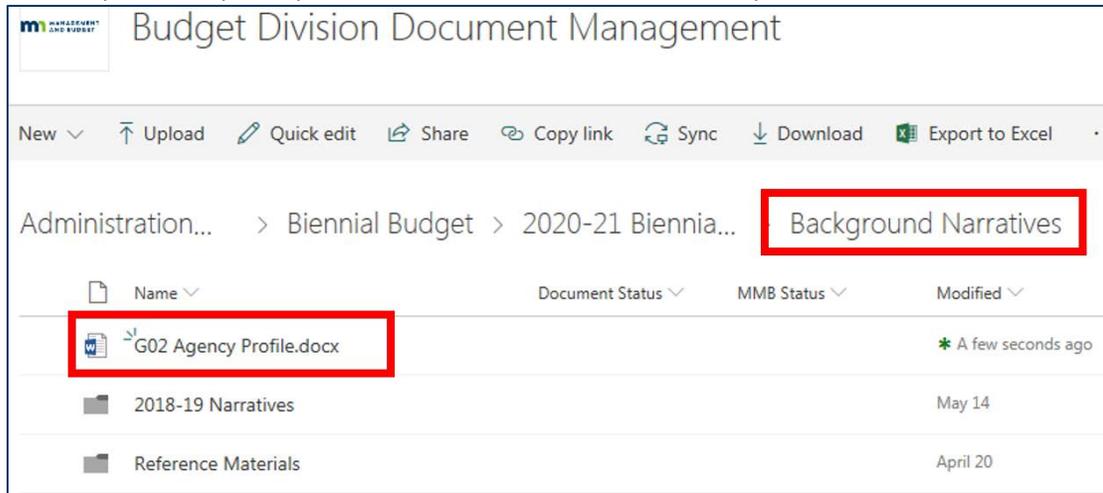


8. SharePoint will bring you to the document properties menu. Please verify that the name listed in the File name box is using the naming convention listed below:

***Naming conventions for the templates are as follows:***

Template	File Name When Saving the Document to SharePoint
Agency Profile	Agency Code Agency Profile (e.g., G02 Agency Profile)
Program/Activity Template	Program/Activity Number-Name of Program or Activity

9. Select Open and upload your document to the document library



For more instructions on SharePoint functionality, refer to the [SharePoint Reference Guide](https://mn.gov/mmb-stat/documents/budget/budget-instructions/sharepoint-instructions.pdf) (https://mn.gov/mmb-stat/documents/budget/budget-instructions/sharepoint-instructions.pdf)