



New Mexico
Department of Finance
and Administration



Department of Finance and Administration

Introduction to State Budget Submission Module

TODAY'S AGENDA

Time	Item
5 Minutes	Welcome and Purpose of Meeting
5 Minutes	Timeline
30 Minutes	System Functionality <ul style="list-style-type: none">• User Roles and Permissions• Submitting Requests• Reviewing/Tracking Requests
5 Minutes	Access to State Budget Submission Module and Next Steps <ul style="list-style-type: none">• Invites to the agency users will come from platform@dfa.nm.gov on June 11th to access https://platform.dfa.nm.gov/
15 Minutes	Q&A

INTRODUCING

State Budget Submissions Module

- A centralized, unified system designed for processing state budget change requests
- The system will be accessible from an internet browser using state email address
- Multi-factor authentication by text or email is required
- This may be one of multiple modules a user will have access to

LAUNCH TIMELINE

Date/Timeframe	Item
Tuesday, July 8, 10am Thursday, July 10, 3pm	Agency Introductory Trainings
Thursday, July 10, COB	Deadline for agency CFOs to submit users for automatic account creation
Friday, July 11	Agency Users Receive Welcome Email/Access <ul style="list-style-type: none">Invites will come from platform@dfa.nm.gov to access the module at https://platform.dfa.nm.gov/
Monday, July 14	Module Goes Live
Weekly beginning July 14	Weekly Office Hour to Support Launch

Key Functions

SBD Module empowers agency partners to submit and track BAR, BRF and OpBud-4 requests. The system's components include:

1 Request Submission

Empowers agencies to submit budget change requests directly.

2 Request Tracking

Agencies can track the status of their request, ensuring a streamlined process for communicating needs.

3 Reporting

Reporting capabilities will provide insights into request volumes and processing times, helping users understand and improve request processing.



Agency User Roles

State Budget Submissions Module allows for different Agency User types:

Agency Initiator

An Agency Initiator can initiate requests.

If a request is denied or returned from DFA for additional details, the submitter will have the ability to correct or cancel the submission.

Agency Approver

An Agency Approver can approve or deny requests initiated by Agency Initiator.

Dual Role

A Dual Role can switch between Agency Initiator and Agency Approver roles.

Dual Roles cannot approve a request they initiated.

Add Users Permission

An Agency User with Add User permissions (typically CFO) can add additional agency users for their respective agency, for the State Budget Submissions Module only.



- New Account

- If you have a *new account* in <https://platform.dfa.nm.gov/>, you will receive an email with a temporary password for system from platform@dfa.nm.gov
- When you log in for the first time, you will be prompted to reset your password
- You will be required to multi-factor authenticate via work email or text each time you log in

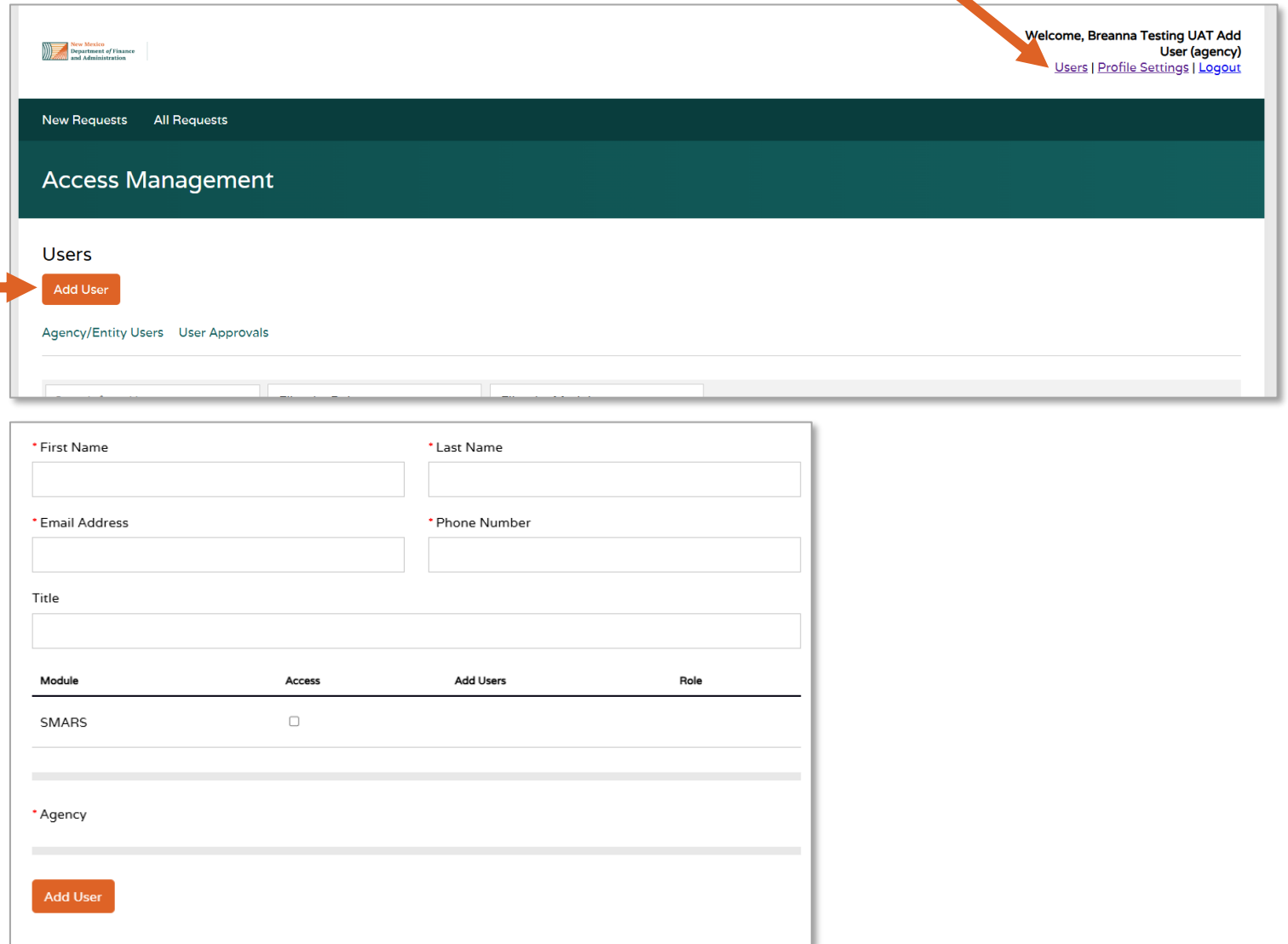
- Existing Account

- If you have an *existing account* <https://platform.dfa.nm.gov/>, your permissions will be updated and the new module will be added to the navigation bar:



Adding New Users

- This functionality is only accessible to Agency CFOs.
- To add a user, click the “Users” tab at the top right side of the screen, then click “Add User”.
- Complete the required User information and save the submission.
- The new user will automatically receive an email inviting them to the system.



Welcome, Breanna Testing UAT Add User (agency)
[Users](#) | [Profile Settings](#) | [Logout](#)

New Requests All Requests

Access Management

Users

[Add User](#)

[Agency/Entity Users](#) [User Approvals](#)

* First Name * Last Name

* Email Address * Phone Number

Title

Module	Access	Add Users	Role
SMARS	<input type="checkbox"/>		

* Agency

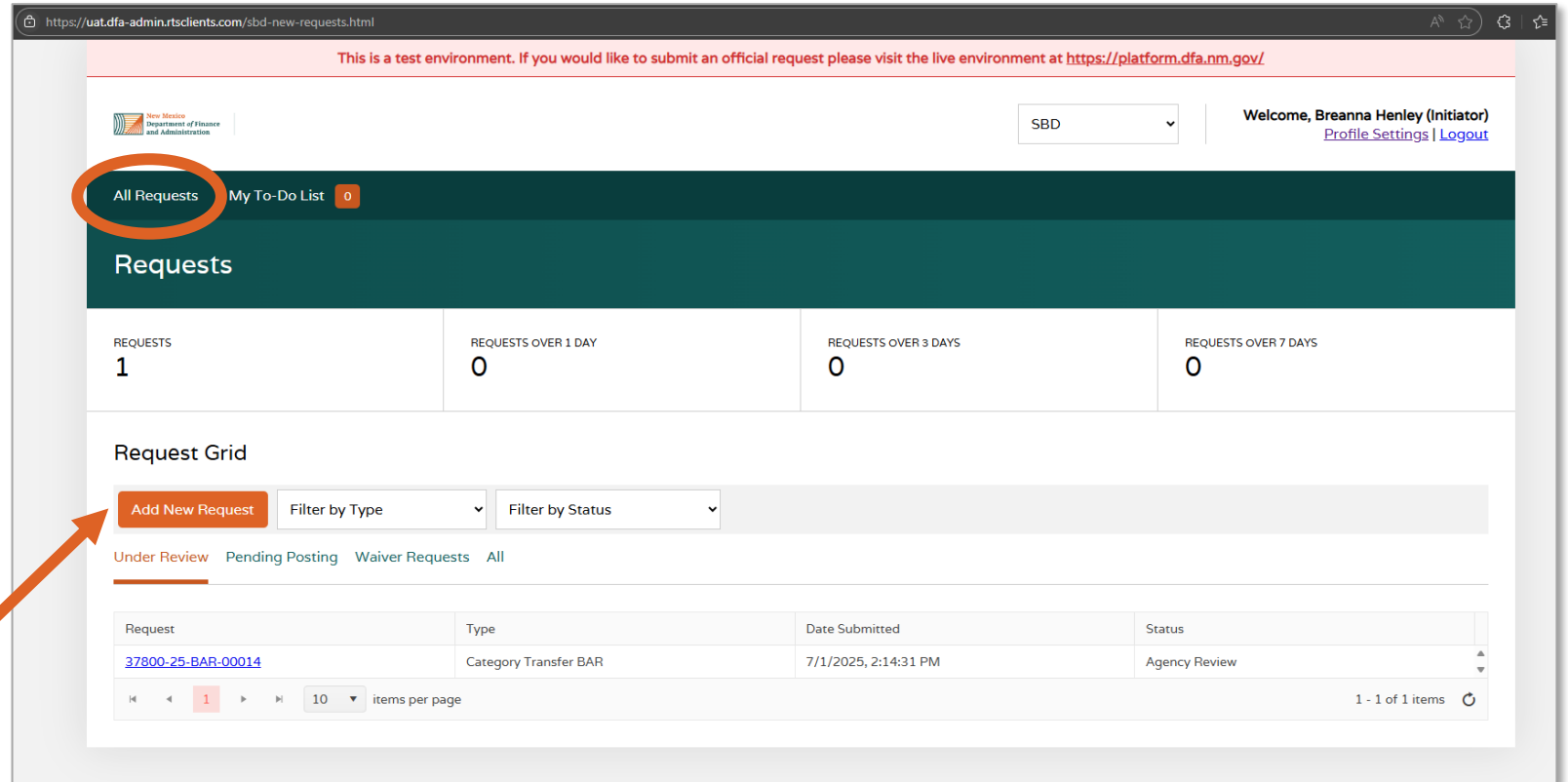
[Add User](#)

AGENCY APPROVER VIEW (Agency CFOs with add user permission)

Navigating the System

Navigating State Budget Submissions Module

- The “All Requests” page shows all requests, separated into categories:
 - Under Review: Requests in review by Agency Approvers and DFA SBD
 - Pending Posting: Requests that have completed the review stage and are pending posting
 - Waiver Requests: Requests with outstanding LFC waivers
 - All: All requests in any status
- “All Requests” is also where “Add New Request” is located for Agency Initiators



https://uat.dfa-admin.rtsclients.com/sbd-new-requests.html

This is a test environment. If you would like to submit an official request please visit the live environment at <https://platform.dfa.nm.gov/>

New Mexico Department of Finance and Administration

SBD

Welcome, Breanna Henley (Initiator)
[Profile Settings](#) | [Logout](#)

All Requests My To-Do List 0

Requests

REQUESTS 1	REQUESTS OVER 1 DAY 0	REQUESTS OVER 3 DAYS 0	REQUESTS OVER 7 DAYS 0
---------------	--------------------------	---------------------------	---------------------------

Request Grid

[Add New Request](#) Filter by Type Filter by Status

[Under Review](#) [Pending Posting](#) [Waiver Requests](#) [All](#)

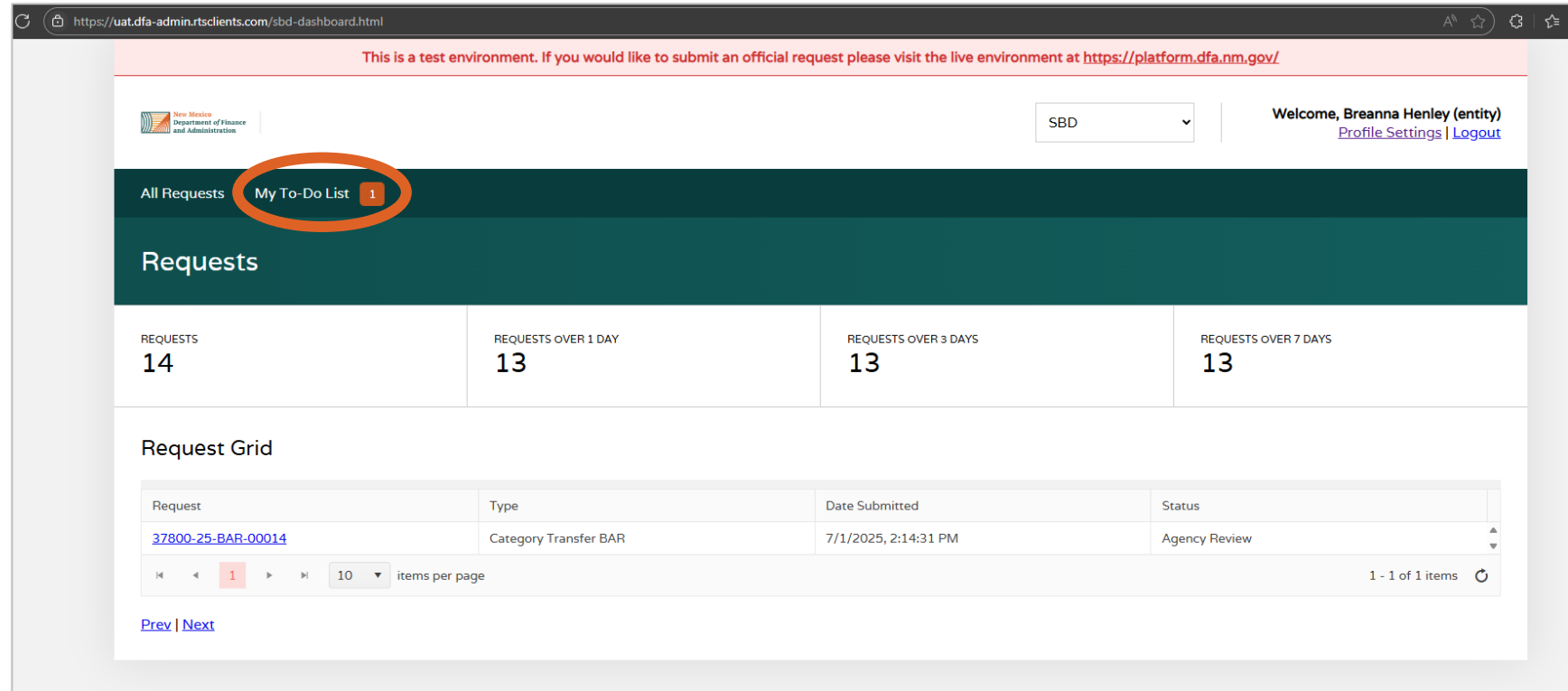
Request	Type	Date Submitted	Status
37800-25-BAR-00014	Category Transfer BAR	7/1/2025, 2:14:31 PM	Agency Review

10 items per page

1 - 1 of 1 items

Navigating State Budget Submissions Module

- The “My To-Do List” page will only show requests pending the user *who is logged in*
- This is where:
 - Returns will show for Agency Initiators
 - Agency Approvers will see requests awaiting their review



The screenshot displays the SBD dashboard interface. At the top, a red banner states: "This is a test environment. If you would like to submit an official request please visit the live environment at <https://platform.dfa.nm.gov/>". Below this, the dashboard header includes the New Mexico Department of Finance and Administration logo, a dropdown menu set to "SBD", and a welcome message for Breanna Henley (entity) with links for Profile Settings and Logout.

The main navigation bar features two tabs: "All Requests" and "My To-Do List", which is highlighted with an orange circle and a red notification badge showing the number "1".

Below the navigation bar, the "Requests" section displays four summary cards:

REQUESTS	REQUESTS OVER 1 DAY	REQUESTS OVER 3 DAYS	REQUESTS OVER 7 DAYS
14	13	13	13

The "Request Grid" section below shows a table with the following data:

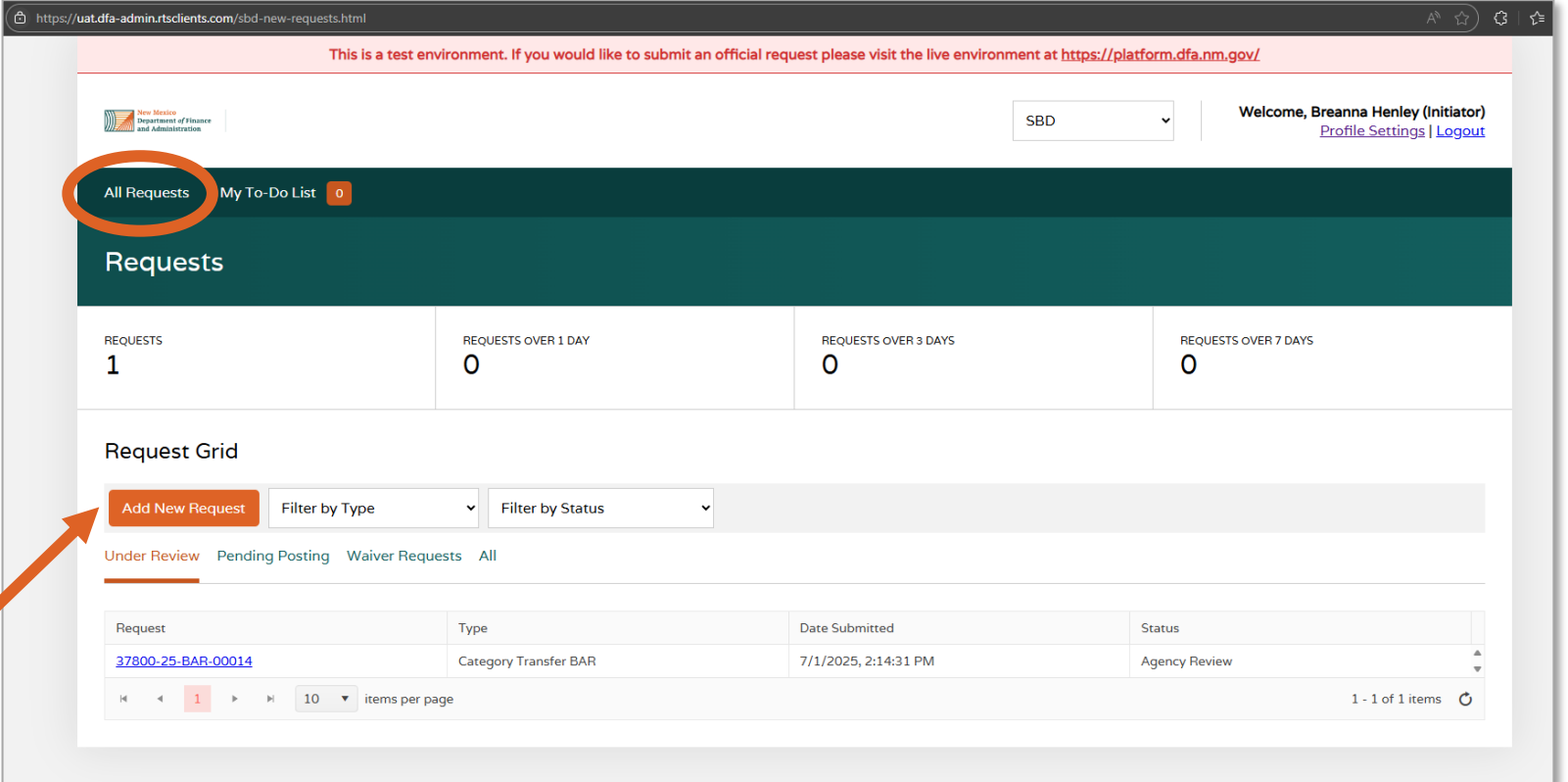
Request	Type	Date Submitted	Status
37800-25-BAR-00014	Category Transfer BAR	7/1/2025, 2:14:31 PM	Agency Review

At the bottom of the grid, there is a pagination control showing "1" of "1" items per page, and a "Prev | Next" link.

Submitting Requests

Submitting a Request in State Budget Submissions Module

- Agency Initiator can initiate a new request under “All Requests” by clicking “Add New Request”



The screenshot displays the 'All Requests' tab in the State Budget Submissions Module. The interface includes a header with the New Mexico Department of Finance and Administration logo, a user greeting for Breanna Henley, and a navigation bar with 'All Requests' and 'My To-Do List' tabs. Below the navigation bar, there are four summary cards: 'REQUESTS 1', 'REQUESTS OVER 1 DAY 0', 'REQUESTS OVER 3 DAYS 0', and 'REQUESTS OVER 7 DAYS 0'. The 'Request Grid' section features an 'Add New Request' button, which is highlighted by an orange arrow. To the right of the button are filters for 'Filter by Type' and 'Filter by Status'. Below the button, there are tabs for 'Under Review', 'Pending Posting', 'Waiver Requests', and 'All'. The 'Under Review' tab is selected, showing a table with one request: '37800-25-BAR-00014' with a status of 'Agency Review'. The table has columns for 'Request', 'Type', 'Date Submitted', and 'Status'. At the bottom, there is a pagination bar showing '1' of 1 items and a '10 items per page' dropdown.

https://uat.dfa-admin.rtsclients.com/sbd-new-requests.html

This is a test environment. If you would like to submit an official request please visit the live environment at <https://platform.dfa.nm.gov/>

New Mexico Department of Finance and Administration

SBD

Welcome, Breanna Henley (Initiator)
[Profile Settings](#) | [Logout](#)

All Requests My To-Do List 0

Requests

REQUESTS 1	REQUESTS OVER 1 DAY 0	REQUESTS OVER 3 DAYS 0	REQUESTS OVER 7 DAYS 0
---------------	--------------------------	---------------------------	---------------------------

Request Grid

[Add New Request](#) [Filter by Type](#) [Filter by Status](#)

[Under Review](#) [Pending Posting](#) [Waiver Requests](#) [All](#)

Request	Type	Date Submitted	Status
37800-25-BAR-00014	Category Transfer BAR	7/1/2025, 2:14:31 PM	Agency Review

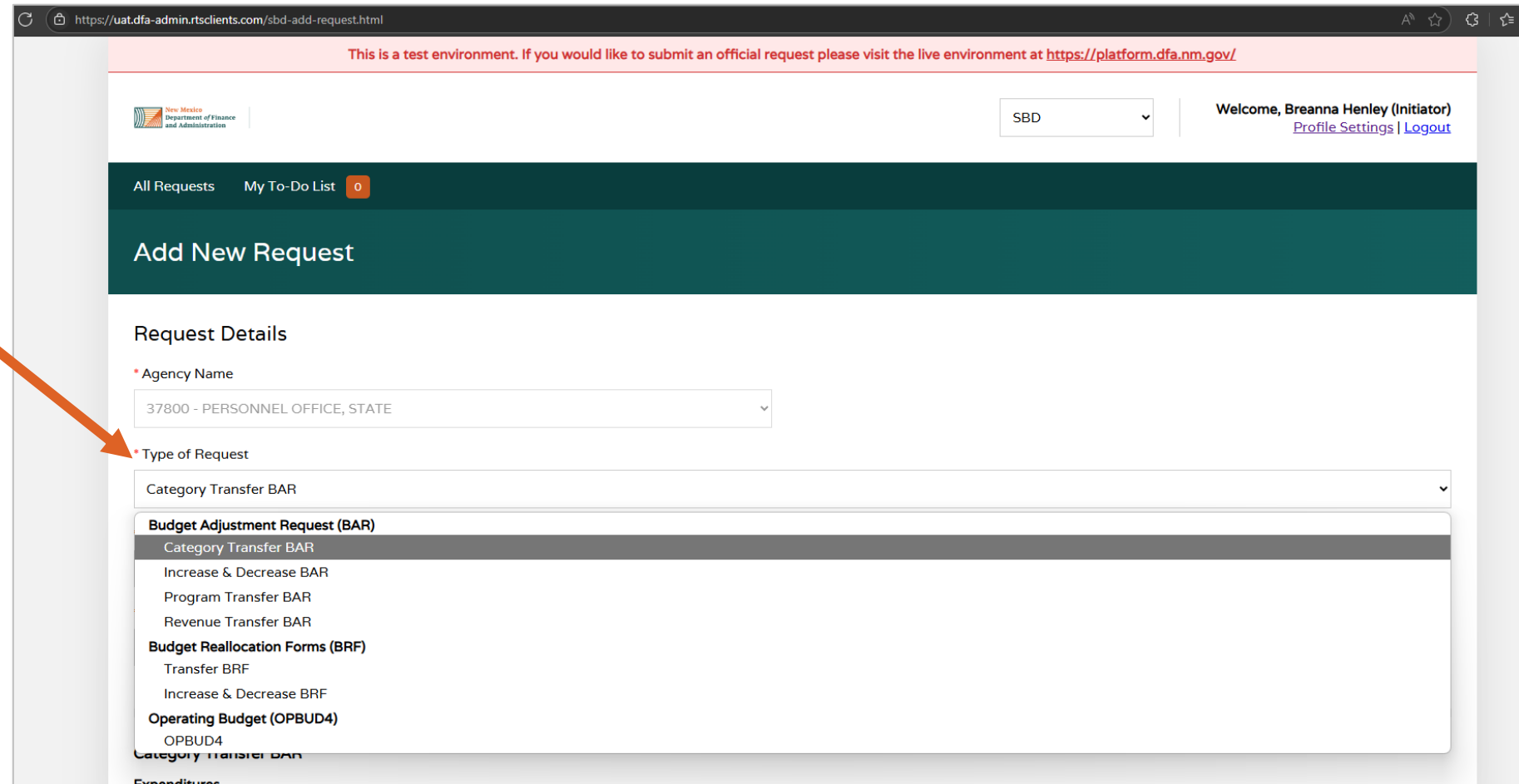
10 items per page

1 - 1 of 1 items

AGENCY INITIATOR VIEW

Submitting a Request in State Budget Submissions Module

- Before completing the form, Agency Initiator is prompted to select the type of request from a dropdown menu



The screenshot shows the 'Add New Request' form in the SBD module. The form is titled 'Add New Request' and includes a 'Request Details' section. The 'Agency Name' dropdown is set to '37800 - PERSONNEL OFFICE, STATE'. The 'Type of Request' dropdown is open, showing a list of options. The first option is 'Category Transfer BAR'. Below it, under the heading 'Budget Adjustment Request (BAR)', are 'Increase & Decrease BAR', 'Program Transfer BAR', and 'Revenue Transfer BAR'. Under the heading 'Budget Reallocation Forms (BRF)', are 'Transfer BRF', 'Increase & Decrease BRF', and 'Operating Budget (OPBUD4)'. The 'Operating Budget (OPBUD4)' option is currently selected. The form is displayed in a test environment, as indicated by the red banner at the top.

This is a test environment. If you would like to submit an official request please visit the live environment at <https://platform.dfa.nm.gov/>

New Mexico
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SBD

Welcome, Breanna Henley (Initiator)
[Profile Settings](#) | [Logout](#)

All Requests My To-Do List 0

Add New Request

Request Details

* Agency Name
37800 - PERSONNEL OFFICE, STATE

* Type of Request
Category Transfer BAR

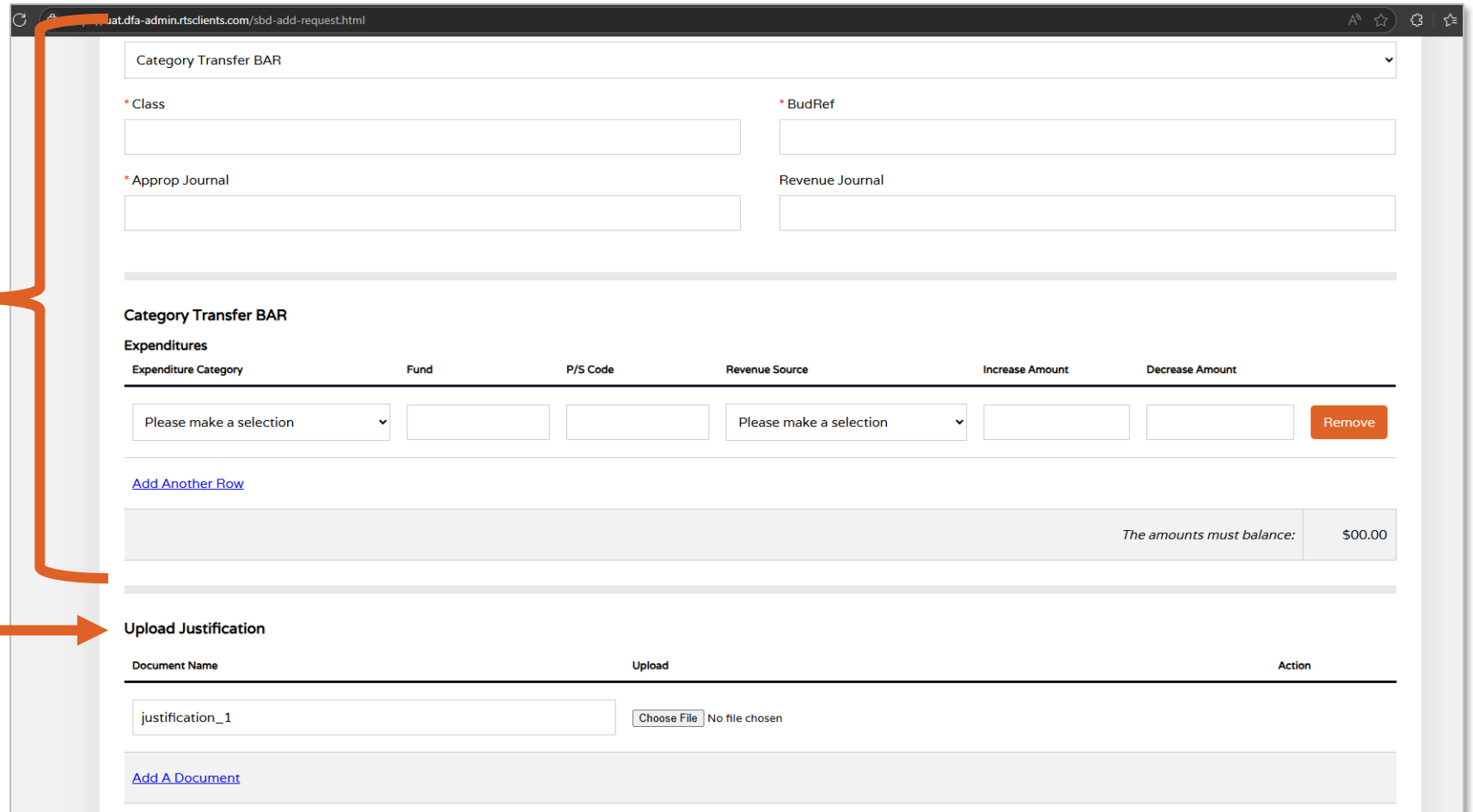
Budget Adjustment Request (BAR)
Category Transfer BAR
Increase & Decrease BAR
Program Transfer BAR
Revenue Transfer BAR

Budget Reallocation Forms (BRF)
Transfer BRF
Increase & Decrease BRF

Operating Budget (OPBUD4)
OPBUD4
Category Transfer BAR
Expenditures

Submitting a Request in State Budget Submissions Module

- After selecting a request type, the Agency Initiator can complete the form
- Form fields vary depending on the request type, Agency Initiator will be prompted to complete budget, expenditure, or revenue information as required by request type
- All request types have varying required documentation that Agency Initiator will be prompted to upload (PDF, Excel, and Word are accepted)



Category Transfer BAR

* Class

* BudRef

* Approp Journal

Revenue Journal

Category Transfer BAR

Expenditures

Expenditure Category	Fund	P/S Code	Revenue Source	Increase Amount	Decrease Amount
Please make a selection	<input type="text"/>	<input type="text"/>	Please make a selection	<input type="text"/>	<input type="text"/>
					Remove

[Add Another Row](#)

The amounts must balance: \$00.00

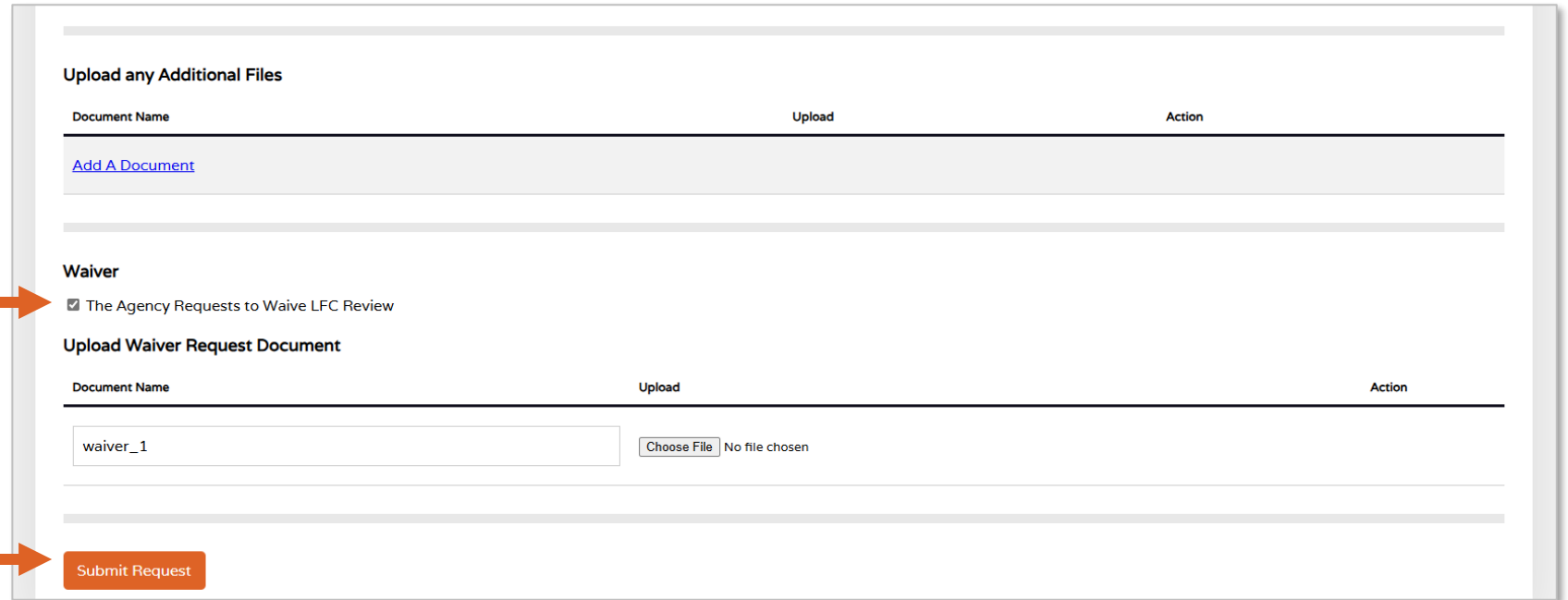
Upload Justification

Document Name	Upload	Action
justification_1	Choose File No file chosen	

[Add A Document](#)

Submitting a Request in State Budget Submissions Module

- In addition to the required documents, Agency Initiator may upload any additional files they'd like to include for consideration
- On certain requests, Agency Initiator has the option to request to waive LFC 10-day review
- Once all fields are populated, Agency Initiator can submit!



Upload any Additional Files

Document Name	Upload	Action
Add A Document		

Waiver

☒ The Agency Requests to Waive LFC Review

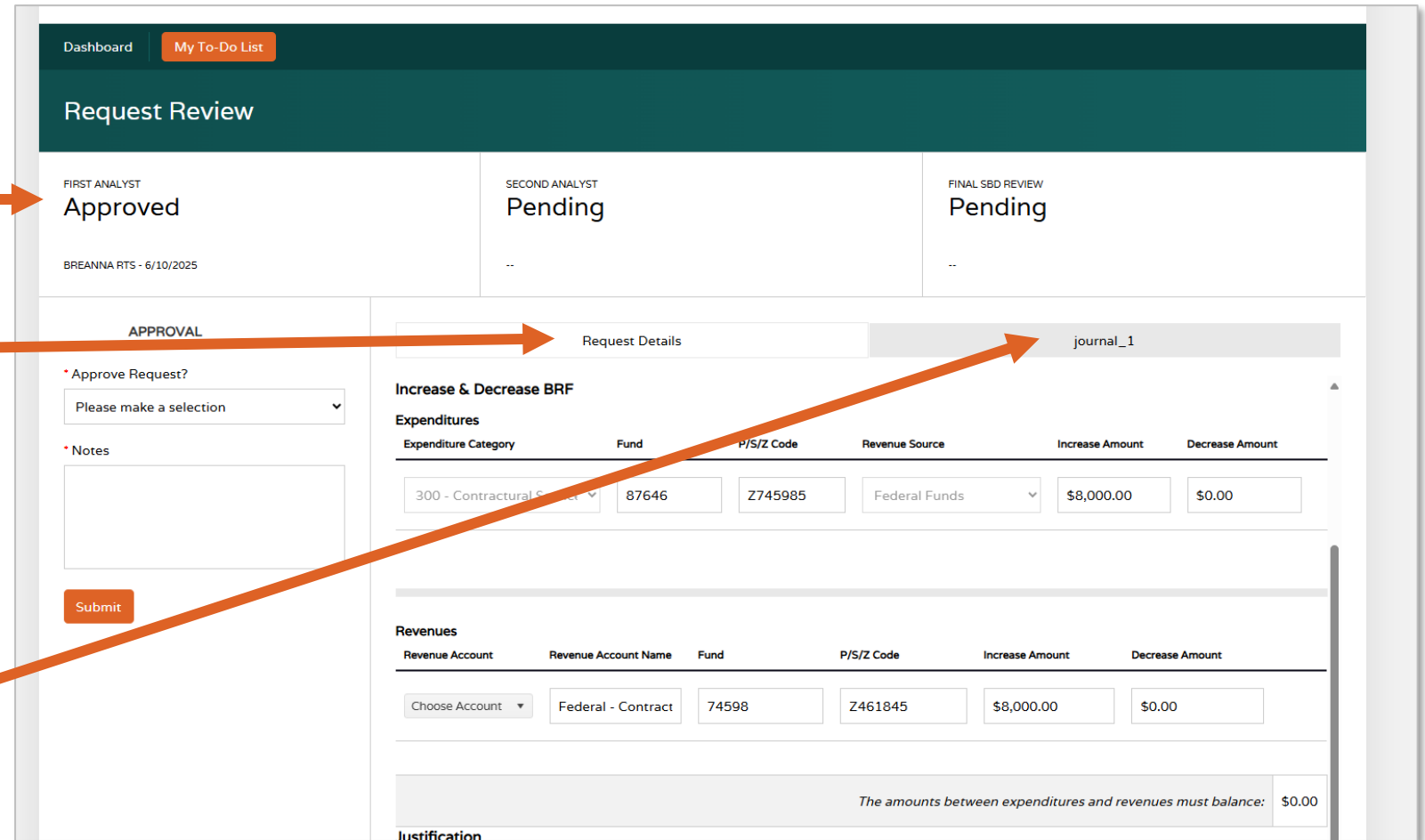
Upload Waiver Request Document

Document Name	Upload	Action
<input type="text" value="waiver_1"/>	<input type="button" value="Choose File"/> No file chosen	

Reviewing Requests

Request Review at Agency Level in SBS Module

- Within each request, you will see the upcoming SBD signatures required along the top and actions taken
- Under the “Request Details” tab, you will see details included in the request including request type, relevant expenditures and revenues, and supporting documentation
- You can click the subsequent tabs to view the attachments



Dashboard My To-Do List

Request Review

FIRST ANALYST	SECOND ANALYST	FINAL SBD REVIEW
Approved	Pending	Pending
BREANNA RTS - 6/10/2025	--	--

APPROVAL Request Details journal_1

* Approve Request?
Please make a selection

* Notes

Submit

Increase & Decrease BRF

Expenditures

Expenditure Category	Fund	P/S/Z Code	Revenue Source	Increase Amount	Decrease Amount
300 - Contractual Services	87646	Z745985	Federal Funds	\$8,000.00	\$0.00

Revenues

Revenue Account	Revenue Account Name	Fund	P/S/Z Code	Increase Amount	Decrease Amount
Choose Account	Federal - Contract	74598	Z461845	\$8,000.00	\$0.00

The amounts between expenditures and revenues must balance: \$0.00

Justification

Request Review at Agency Level in SBS Module

- As requests are reviewed, Agency Approvers can take three actions:
 - Approve
 - This will send the request forward to SBD
 - Send Back to Agency (Initiator)
 - This will send the request back to the Agency Initiator and allow them to modify and submit corrections or cancel the request
 - Void
 - Cancel the request
- Notes can be left to communicate details about the action
 - Notes are viewable by the agency and SBD

This is a test environment. If you would like to submit an official request please visit the live environment at <https://platform.dfa.nm.gov/>

New Mexico Department of Finance and Administration

SBD Program Manager

Welcome, VM Auditor Breanna
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Dashboard My To-Do List

Request Review

FIRST ANALYST Pending	SECOND ANALYST Pending	FINAL SBD REVIEW Pending
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ANALYST APPROVAL

Approve Request?

Please make a selection

Please make a selection

Approve

Void

Send Back To Agency

Submit

Request Details

journal_1

Agency Name
62400 - AGENCY ON AGING, STATE

Type of Request
Increase & Decrease BRF

Class
C48445

BudRef

Increase & Decrease BRF

Expenditures

Expenditure Category	Fund	BRF Code	Budget Source	Increase Amount	Decrease Amount
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Tracking SBD Review/Approval

Tracking SBD's Review in SBS Module

- As requests are reviewed by SBD, agency users can track the request by viewing the “status” column of the requests grid
 - Initial Review: Request has been submitted to SBD
 - Awaiting Analyst 1 or 2: SBD Analyst(s) are reviewing the request
 - Pending LFC Review: Countdown for 10-day LFC review period
 - Pending Posting: Request is approved and pending posting
 - Posted: Request has posted
- Request History is viewable at the bottom of each request for review of actions/notes

Request Grid

Agency... Filter by Type Filter by Status

Under Review 8 Pending Posting 1 Waiver Requests All

Request	Type	Date Submitted	Status
37800-25-BAR-00016	Category Transfer BAR	7/1/2025, 4:36:24 PM	Pending LFC Review (3 Days Remaining)
37800-25-BAR-00015	Increase & Decrease BAR	7/1/2025, 3:53:05 PM	Pending LFC Review (3 Days Remaining)
37800-25-BAR-00014	Category Transfer BAR	7/1/2025, 2:14:31 PM	Pending LFC Review (3 Days Remaining)
50500-25-BAR-00011	Increase & Decrease BAR	6/12/2025, 1:34:56 PM	Awaiting Analyst 1
50500-25-BAR-00009	Increase & Decrease BAR	6/12/2025, 11:47:08 AM	Initial Review
50500-25-BAR-00007	Increase & Decrease BAR	6/12/2025, 11:07:17 AM	Initial Review
50500-25-BAR-00006	Category Transfer BAR	6/12/2025, 11:04:04 AM	Initial Review
50500-25-BAR-00005	Increase & Decrease BAR	6/12/2025, 10:35:58 AM	Initial Review

10 items per page 1 - 8 of 8 items

Request History

Changed On	Changed By	Status	Notes
7/1/2025, 4:37:54 PM	Ed Sweeney ed+sbdanalyst@rtsolutions.com	Moving to next approval step	
7/1/2025, 4:37:54 PM	Breanna Henley (entity) breanna+entity@rtsolutions.com	Sent to LFC for review	
7/1/2025, 4:37:01 PM	Breanna Henley (entity) breanna+entity@rtsolutions.com	Moving to next approval step	
7/1/2025, 4:36:24 PM	Breanna Henley (Initiator) breanna@rtsolutions.com	New Request Created	

1 - 4 of 4 items



Thank you!