



# Fiscal Note Tracking System (FNTS) User Guide

Technical Manual

November 2018  
MMB Budget Planning and Operations  
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## Chapter 1: Overview of System Access & Security

### Fiscal Note Tracking System Security

Access to the Fiscal Note Tracking System (FNTS) is limited to individuals directly involved in the fiscal note process. Every system user must be authorized according to [MMB's FNTS Access Policy](#) located on the [Fiscal Note Tracking System](#) webpage on Minnesota Management and Budget's website.

Users requesting access to FNTS must submit a completed authorization form signed by their fiscal note coordinator to [Budget.Finance.mmb@state.mn.us](mailto:Budget.Finance.mmb@state.mn.us). A copy of the [Budget Systems user authorization form](#) is located on the [Fiscal Note Tracking System](#) website on Minnesota Management and Budget's website.

Fiscal Notes Tracking System security is controlled by user ID/password, user role, and agency number (for agency users). The user role controls access to various menu options, screens, and functions in the system. Agency code controls agency access to the prepare screens for each fiscal note.

The five user roles in FNTS are:

User Role	Function
Legislative User	Request fiscal notes
Agency	Prepare (enter data) fiscal notes assigned to the agency
Agency Sign Off	Prepare (enter data) and sign off on (approve) fiscal notes assigned to the agency
EBO	MMB Executive Budget Officer - Review, sign off on (approve) assigned agency fiscal notes after the agency has signed off
MMB Admin	MMB Administrative User - Retrieve fiscal note requests and assign them to agencies affected by the bill

### FNTS Functional Overview

The Fiscal Note Tracking System (FNTS) is a web-based system operated by Minnesota Management and Budget (MMB) for the purpose of reviewing proposed legislation that may have a fiscal impact. The system consists of five major functions:

1. **Security function** controls system sign-on and access rights for various user roles.
2. **Request function** enables the legislature to electronically request fiscal notes and MMB to assign and notify assigned agencies.
3. **Preparation function** enables agencies to enter, edit and store fiscal note data.
4. **Tracking function** enables users to follow the status of fiscal note requests.
5. **Reporting function** enables users to view and save or print fiscal notes, as well as run tracking and statistical reports.

Responsibility	Summary of FNTS Role, Action & Status
Legislature (House or Senate)	<p>Enters fiscal note request into FNTS. A requester indicates the bill number and version, author, requesting committee, due date, and any relevant messages to MMB and agencies to be assigned. At this point, a fiscal note has a fiscal note status of “Legislative Request”.</p> <p>Uses the “Message” function to communicate relevant information such as committee hearing dates, if the bill is similar to other legislation or if the agency is only being asked to respond to certain sections of the bill.</p>
MMB Budget Planning and Operations	<p>Reviews bill for which fiscal note is requested. Determines agency or agencies affected by provisions of the bill. Assigns agencies to the fiscal note.</p> <p>If more than one agency is assigned (consolidated note), selects and designates a Lead agency.</p> <p>Uses the “Message” function to communicate any relevant information, such as if a central service agency is being asked to respond on behalf of multiple agencies.</p>
Agency Fiscal Note Coordinator	<p>FNTS notifies assigned agencies by e-mail of new fiscal note requests. Agencies should routinely check FNTS daily to monitor status of their incomplete fiscal notes.</p> <p>Obtains bill for which a fiscal note has been requested. Reads bill and distributes to appropriate agency staff. At this point, a fiscal note has an agency status of “Agency Draft.”</p> <p>To obtain a listing of all new and incomplete fiscal notes, agency checks Agency Action Required box on the search screen.</p>
Agency Fiscal Note Coordinator, with other Agency Staff	<p>Reads and analyzes bill to prepare an accurate and complete estimate of its fiscal impact. Prepares fiscal note narrative to explain assumptions and rationale used in preparing fiscal estimates. Prior to the stipulated due date, forwards material to agency fiscal note coordinator.</p> <p>If consolidated fiscal note, works with other assigned agencies to coordinate assumptions used for fiscal note preparation.</p> <p>If local government units are affected, works with representatives of local government organizations to estimate impact of bill on relevant local government units or political subdivisions.</p>
Agency Fiscal Note Coordinator	<p>Reviews and organizes expenditure, revenue, and FTE information provided by agency staff. Assembles all relevant fiscal and narrative information and forwards to agency FNTS staff. To facilitate entry, this information should be provided to agency FNTS staff on the fiscal note worksheet. The Fiscal Note Worksheet can be obtained online at: <a href="https://www.mn.gov/mmb/budget/statewide-budget-systems/fns/">https://www.mn.gov/mmb/budget/statewide-budget-systems/fns/</a></p>

Responsibility	Summary of FNTS Role, Action & Status
Agency FNTS Staff	<p>Completes Fiscal Impact indicators; as applicable, enters expenditure, agency can absorb amount, transfers out, revenue, transfers in, and FTE information by fund for each fiscal year.</p> <p>Completes fiscal note narrative sections.</p>
Agency Fiscal Note Coordinator	<p>Reviews fiscal note. If fiscal note is acceptable, authorizes agency sign off.</p> <p>If lead agency for a consolidated fiscal note, reviews data entered by other agencies using the View option in FNTS. If errors or omissions are found in data entered by another agency, contacts agency to obtain accurate data. In the FNTS menu, under Directories, select Agency Coordinators to search for and find contact information.</p> <p>Note: Lead agencies cannot access FNTS for the purpose of altering data entered by other agencies; any necessary changes must be made by the agency that originally entered the data.</p>
MMB - Executive Budget Officer	<p>Reviews completed fiscal note in FNTS.</p> <p>If acceptable, signs off in system by selecting appropriate signoff option (approve or not approve). Enters comments, as necessary, using the EBO narrative screen.</p> <p>If agency data is not acceptable, contacts the agency with questions or recommendations for revision. If the fiscal note is a consolidated fiscal note (more than one agency assigned), see the next step.</p>
MMB - Lead Executive Budget Officer (Consolidated Fiscal Notes Only)	<p>If the fiscal note is a consolidated fiscal note, the lead agency EBO reviews the fiscal note for conflicting assumptions, double counting, or omissions.</p> <p>If acceptable, signs off in the system by selecting appropriate signoff option (approve or not approve). Enters comments, as necessary, in the EBO narrative textbox.</p> <p>If data entered by any assigned agency is unacceptable, contacts the agency or assigned EBO with questions or recommendations for revision.</p>
MMB Fiscal Note Tracking System	<p>Immediately following the final EBO signoff, the completed fiscal note is distributed via e-mail to the legislative requester, chief author, requesting committee's FNTS email notification list, the assigned agency's fiscal note coordinator and agency email notification list.</p>
Legislative Staff	<p>Reviews completed fiscal note. If necessary, contacts agency contact person, agency fiscal note coordinator or MMB executive budget officer to obtain additional information or clarification. If bill is amended or engrossed, may request new fiscal note (thus returning to the beginning of the fiscal note process).</p>

## Fiscal Note Types

Fiscal notes are requested by House or Senate committee chairs and entered by legislative fiscal staff in FNTS through the system's Request screen, which is a feature only available to authorized legislative users and MMB Budget Planning and Operations staff.

When entering a fiscal note request, legislative staff must choose one of the three note types described below:

Fiscal Note Type	Description
Regular	A note on a bill that has been introduced and referred to a legislative committee, as well as later amendments to the bill. The fiscal note version indicates whether the request is for the original bill language (version 0); amended language (version #A); engrossed language (version #E); an Unofficial engrossment (version #UE); or a Committee engrossment (version #CE). Completed notes are published 48 hours after completion on MMB's website.
Unofficial	A note on draft legislation that has not been introduced. See <a href="#">M.S. 13.64, Subd. 3(a)</a> . FNTS will automatically assign a bill number to the fiscal note, beginning with 9000, e.g., SF9000-0 and HF9000-0. The requester is required to upload a copy of the draft bill language to FNTS before MMB can assign the note. Unofficial fiscal notes follow the same process as regular fiscal notes. Completed notes are published 48 hours after completion on MMB's website.
Unofficial–Classified	A requester may designate an unofficial fiscal note to be classified as nonpublic data (see <a href="#">M.S. 13.64, Subd. 3(b)</a> ). FNTS does not display classified unofficial notes to all system users; the system restricts access to the note's requester, MMB Budget Planning and Operations, assigned agency fiscal note coordinator and signoff role users and EBOs. FNTS will automatically assign a bill number to the fiscal note with the version 0, beginning with 9000, e.g., SF9000-0 and HF9000-0. Completed classified unofficial fiscal notes are NOT published on MMB's website.

Note: FNTS does not include Local Impact Notes, which assess the fiscal impact of a bill on local units of government. See M.S. 3.987. Local notes follow a separate process and are not managed through FNTS. (See Local Impact Note section in Policy Manual)

## Logging In

Log in to the Fiscal Note Tracking System through the Statewide Administrative Portal using your state ID (employee number) and password.

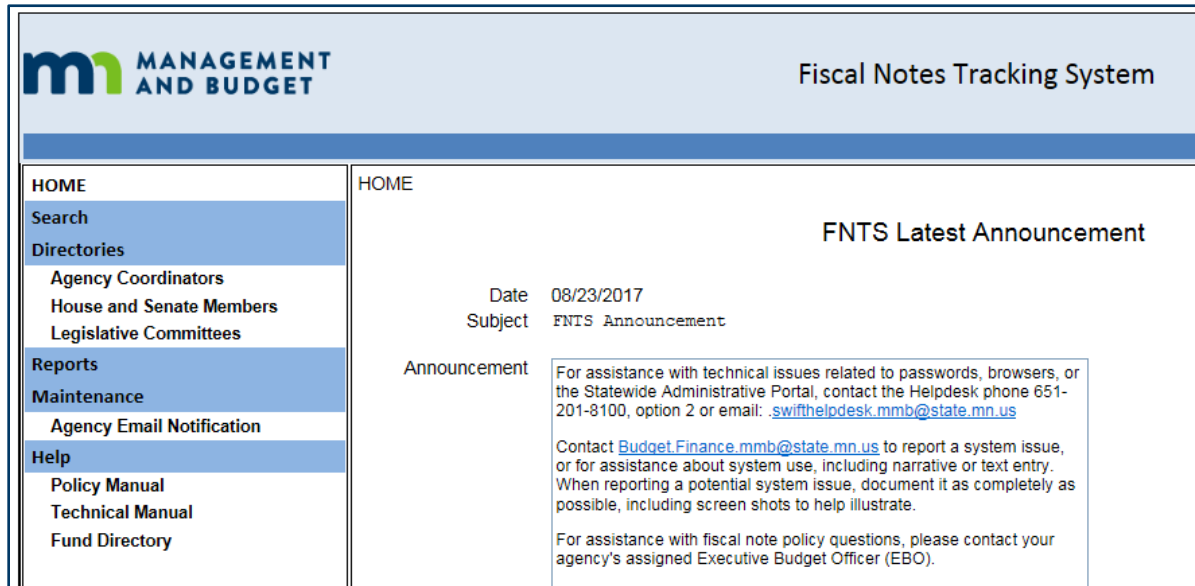


Open an internet browser session. FNTS is compatible with Google Chrome or Internet Explorer (IE) web browsers. If using Internet Explorer, you must use Version 11 (IE-11). Note: the screen prints in this manual are from Internet Explorer.)

1. Navigate to the Administrative Portal at: [Statewide Administrative Portal](#).
2. Enter your state ID (employee number) and password. Click Sign In.
  - a. If you do not have an employee number you will be provided an ID by MMB Budget Planning and Operations after submitting the Budget Systems' Authorization form in order to access FNTS.
3. The link to the Fiscal Note Tracking System (FNTS) will be displayed in the portal menu. Click on the Fiscal Note Tracking System link to enter FNTS. (Your menu may show more or fewer items than in the picture below, depending on your user profile.)



4. The FNTS Home Page will be displayed. System announcements from MMB Budget Planning and Operations are posted on this page. The menu in the left hand side of the screen lists all of the system functions available for your user role. The picture below shows the menu selections for Agency users. Legislative users' menus have an additional item, Request, at the top of their menu.



5. Use the menu on the left hand side of the screen to navigate through the system.



## Assistance

MMB staff is available to assist agencies in resolving fiscal note policy, procedure, or system issues. For assistance or questions on system issues, using the FNTS system, or fiscal note procedure, email [budget.finance.mmb@state.mn.us](mailto:budget.finance.mmb@state.mn.us). The body of the email message should include the words “Fiscal Note Tracking System” and a description of the issue or question.

For assistance or questions about fiscal note policy issues, please contact your agency’s Executive Budget Officer. **Agencies should contact their Executive Budget Officer directly when they need to discuss the fiscal implications of proposed legislation or resolve issues related to developing the cost and/or revenue estimates for a fiscal note.**

To resolve issues with logging in to the Statewide Administrative Portal, please contact the SWIFT helpdesk at 651-201-8100 option 2; or email [SWIFTHelpDesk.MMB@state.mn.us](mailto:SWIFTHelpDesk.MMB@state.mn.us).



## Chapter 2: System Email Notifications

### System Notifications

FNTS automatically sends email notifications when actions are taken on a fiscal note request at key steps in the fiscal note preparation process. System users receive emails based on their user role. FNTS also has email notification lists, which are maintained by legislative and agency users and used to add persons who are not FNTS users to select system email notifications.

Email notifications are first posted when a Legislative user requests a fiscal note. As the fiscal note moves through the process, notifications are sent out when action is taken on a note. When a note request has been modified (due date changed, for example), when a fiscal note has been prepared and signed off by an agency, completed, revised or inactivated, notifications will be sent to users that may be affected by the change. Status changes are the most common reasons for a notification. A status change would be when a note is changed from active, inactive, complete or revised.

- Legislative Requesters will receive notifications when the due date is changed for a note they've requested; when a required bill language attachment hasn't been uploaded to FNTS; and when a fiscal note is inactivated/reactivated, completed, or revised.
- Agency Coordinator and Agency Email Notification List members will receive notices related to fiscal notes assigned to their agency. These notifications occur as the fiscal note advances through the process.
- Requesting Committee Chair, Committee Email Notification List, and Bill Author are notified when a fiscal note is completed or revised.
- EBOs receive notifications if they are the assigned EBO or Lead EBO when their signoff is needed. EBOs are subscribed to their assigned agencies' email notification lists and will receive agency emails, too, unless they opt out.
- MMB Admin receives notifications when a fiscal note has been requested, when a note's due date is changed, and when a fiscal note is in/reactivated, completed, or revised. See Appendix A for more detail on each type of notification and recipients of the notification.

### Email Notifications for Nonpublic Unofficial Note Requests

When the legislature requests a nonpublic unofficial fiscal note (Classified Unofficial), FNTS restricts the recipients of all system email notifications about the note to the legislative requester, the assigned agency's coordinator, and the assigned agency's EBO; committee and agency email list members will not receive emails for Classified Unofficial notes. The text of these email notifications alerts the recipient that all data on the fiscal note request, the bill draft, and the unofficial fiscal note are private data on individuals or nonpublic data. More information about nonpublic Classified Unofficial fiscal notes can be found in the [Fiscal Note Policy Manual](#).

## Email Notification of New Fiscal Notes

Fiscal Notes Tracking System (FNTS) will send an email notification to agencies when a fiscal note has been assigned to them. This is sent upon execution of the agency being assigned to the note. The subject will read: New Fiscal Notes Assigned Bill Number-Version and will include the following information in the body of the message:

The following Fiscal Note has been assigned to your agency:

Bill Number, version, title, and due date

Author

Requester

Committee

Companion Bill (if the companion bill has a fiscal note request)

Message from the requester or MMB (if any)

If the fiscal note is assigned to multiple agencies (consolidated note), additional information will be included:

Lead Agency

List of all other agencies assigned to the note.

Agencies will receive only one notification for each fiscal note request. They will receive another, separate notification if a fiscal note is requested later for a bill's companion. Agencies assigned to fiscal notes with a companion need to prepare and enter data for either the House or Senate fiscal note; the system will copy all data entered to the companion.

Note: The new note assigned email notification will be sent to the designated Agency Fiscal Note Coordinator by default. If other agency users who are not the Coordinator wish to receive this notice, they can add their email address to their agency's FNTS Agency Email Notification list, found in the system navigation menu under Maintenance (see [Chapter 4: Agency User- Email, Preparation and Signoff of a Fiscal Note for more information](#)).

<b>HOME</b>
<b>Search</b>
<b>Directories</b>
Agency Coordinators
House and Senate Members
Legislative Committees
<b>Reports</b>
<b>Maintenance</b>
Agency Email Notification
<b>Help</b>
Policy Manual
Technical Manual
Fund Directory

## Chapter 3: Legislative Users - Requesting a Fiscal Note

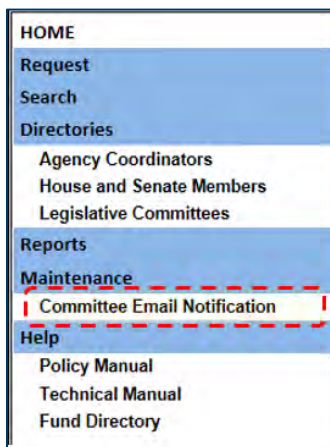
### Committee Email Notifications

FNTS legislative users will automatically receive system-generated email notifications throughout the fiscal note process for fiscal notes they request on behalf of a committee. The Legislative Committee Email Notification feature in FNTS allows legislative users to create and maintain email lists of both system users and persons who are not FNTS users to receive system-generated emails when a fiscal note requested by a particular House or Senate committee is completed or revised. The Legislative Committee Email Notification feature allows legislative users to update the email list of the committee(s) they are assigned to in FNTS. Legislative users may also add their email address to any other House or Senate committee's list to receive system-generated notifications when fiscal notes requested by these committees are completed or revised.

**Note:** Committee email notification lists are the responsibility of the legislative analyst. MMB does not maintain legislative committee email notification lists with the exception that MMB will ensure that each committee's list includes the chair's email address.

The legislative committee email notification feature is found on the FNTS Home Page menu:

1. Click on Committee Email Notification in the Maintenance Menu.



2. The screen will display a list of email recipients for the user's assigned committees, as well as the other committees, if any, to which the user has subscribed to.

HOME > Maintenance > Committee Email Notification Logged As: Commerce LegUser

### Committee Email Notification

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**List of email recipients for my committees**

Chamber	Committee Name	Emails	Delete
S	COMMERCE	commercetest@state.mn.us	
S	JUDICIARY	commercetest@state.mn.us	
House			<a href="#">Add</a>

☐ Add me to a committee's email

### **To add an address to a committee in the user’s security profile**

Legislative Users are able to add email addresses only to those committees for which they are the assigned legislative fiscal analyst in FNTS.

1. Click on Add.

Chamber	Committee Name	Emails	Delete
House			

☐ Add me to a committee's email

2. Select the chamber and committee name from the drop down menus. This will only display the committees the Legislative user is assigned to.

Chamber	Committee Name	Emails	Delete
House	Select...		

☐ Add me to a committee's email

3. Type in the email address, then click Save.

Chamber	Committee Name	Emails	Delete
House	Select...		

☐ Add me to a committee's email

### **To add your own email address to another House or Senate Committee’s list**

A Legislative User is able to add themselves to any committee, House or Senate.

4. Click on Add.

Chamber	Committee Name	Emails	Delete
House			

☐ Add me to a committee's email

5. In the bottom right corner check the “Add me to a committee’s email” checkbox. If this is not selected, you will not be able to enter your own email to other committees.

Chamber	Committee Name	Emails	Delete
House	Select...		

☒ Add me to a committee's email



6. Select a chamber and committee name from the dropdown lists, and click Save.

Chamber	Committee Name	Emails	Delete
House	Select...		

☒ Add me to a committee's email

## To delete any entry

1. Click on the trash can icon and then click OK in the textbox prompt.

List of email recipients for my committees			
Chamber	Committee Name	Emails	Delete
H	CAPITAL INVESTMENT	waysmeansleguser@state.mn.us	
H	EDUCATION FINANCE	e12legusertest@state.mn.us	
House	Select...		<input type="checkbox"/> Add me to a committee's email

Save Cancel


## Initiating a Fiscal Note

Fiscal note requests are initiated by House or Senate committee chairs or fiscal committee staff and are electronically transmitted to MMB through the FNTS's request screen. Legislative users can add, delete, or modify a note request from this screen until MMB assigns an agency to prepare the fiscal note. The Request screen is only available to legislative users and MMB Budget Planning and Operations fiscal note staff.

Legislative users may request three different types of notes in FNTS. The Note Type selection, a required data field on the Request Screen, determines how the system will process the request. For example, Classified Unofficial Note has a special security features, which restricts access to the note (Classified Unofficial Note).

## Requesting a Regular Fiscal Note

1. Select the Request screen from the menu options on the left side of your Home page.

 <span style="float: right;">Fiscal Notes Tracking System</span>	
<div>HOME</div> <div>Search</div> <div>Directories</div> <div>Agency Coordinators</div> <div>House and Senate Members</div> <div>Legislative Committees</div> <div>Reports</div> <div>Maintenance</div> <div>Agency Email Notification</div> <div>Help</div> <div>Policy Manual</div> <div>Technical Manual</div> <div>Fund Directory</div>	<div>HOME</div> <div style="text-align: right;">FNTS Latest Announcement</div> <div> <div>Date</div> <div>08/23/2017</div> </div> <div> <div>Subject</div> <div>FNTS Announcement</div> </div> <div> <div>Announcement</div> <div> <p>For assistance with technical issues related to passwords, browsers, or the Statewide Administrative Portal, contact the Helpdesk phone 651-201-8100, option 2 or email: <a href="mailto:swifthehelpdesk.mmb@state.mn.us">swifthehelpdesk.mmb@state.mn.us</a></p> <p>Contact <a href="mailto:Budget.Finance.mmb@state.mn.us">Budget.Finance.mmb@state.mn.us</a> to report a system issue, or for assistance about system use, including narrative or text entry. When reporting a potential system issue, document it as completely as possible, including screen shots to help illustrate.</p> <p>For assistance with fiscal note policy questions, please contact your agency's assigned Executive Budget Officer (EBO).</p> </div> </div>

- The Request screen displays any fiscal note requests you entered that have not been assigned by MMB Budget Planning and Operations. If there is a date in the Retrieve Date column, MMB has retrieved but not assigned your request. Once your request is retrieved and assigned, it will be removed from this list.

HOME

Request

Search

Directories

Agency Coordinators

House and Senate Members

Legislative Committees

Reports

Maintenance

Committee Email Notification

Help

Policy Manual

Technical Manual

Fund Directory

HOME > Request

Logged As: AdminUser TESTADM

Request

Summary list of my outstanding requests that are not assigned yet:

8 records found

Assign Retrieve	Bill Nbr	Version	Author	Due Date	Req. Committee	Request Date	Type	Msg	Attachment Required	Retrieve Date	Edit	Delete
	<a href="#">Bill Status</a>	HF9790	0	Author, Unknown	1/18/2016	UNKNOWN COMMITTEE	12/9/2015 8:42:04 AM	Classified Unofficial Fiscal Note	missing		<a href="#">Edit</a>	<a href="#">Delete</a>
	<a href="#">Bill Status</a>	HF9791	0	Author, Unknown	12/17/2015	UNKNOWN COMMITTEE	12/9/2015 8:42:31 AM	Classified Unofficial Fiscal Note	missing	1/4/2016 10:21:46 AM	<a href="#">Edit</a>	
	<a href="#">Bill Text</a> <a href="#">Bill Status</a>	SF1143	0	BROWN, DAVID	1/22/2016	ENVIRONMENT, ECONOMIC DEVELOPMENT AND AGRICULTURE DIVISION	1/12/2016 9:47:49 AM	Regular Fiscal Note	no	1/12/2016 9:49:31 AM	<a href="#">Edit</a>	
	<a href="#">Bill Text</a> <a href="#">Bill Status</a>	SF2005	0	ANDERSON, BRUCE	1/12/2016	CAPITAL INVESTMENT	1/9/2016 7:15:13 AM	Regular Fiscal Note	no		<a href="#">Edit</a>	<a href="#">Delete</a>
	<a href="#">Bill Text</a> <a href="#">Bill Status</a>	SF2200	0	ANDERSON, BRUCE	11/27/2015	COMMERCE	11/17/2015 8:17:02 AM	Regular Fiscal Note	no	11/17/2015 8:18:43 AM	<a href="#">Edit</a>	
	<a href="#">Bill Status</a>	SF9912	0	Author, Unknown	1/16/2016	UNKNOWN COMMITTEE	1/8/2016 7:41:01 AM	Unofficial Fiscal Note	yes	1/8/2016 7:48:59 AM	<a href="#">Edit</a>	
	<a href="#">Bill Status</a>	SF9913	0	ANZELC, TOM	1/16/2016	AGING & LONG-TERM CARE POLICY	1/8/2016 8:14:00 AM	Unofficial Fiscal Note	missing		<a href="#">Edit</a>	<a href="#">Delete</a>
	<a href="#">Bill Status</a>	SF9916	0	Author, Unknown	1/16/2016	UNKNOWN COMMITTEE	1/8/2016 2:35:06 PM	Classified Unofficial Fiscal Note	missing		<a href="#">Edit</a>	<a href="#">Delete</a>

Add New

- To add a new fiscal note request, click on the Add New button at the bottom of the Request Screen. The Add Request screen will appear.

Request

Add request information:

\*Chamber:

Select...

\*Fiscal Note Type:

Regular

\*Bill Number:

\*Bill Version:

\*Author:

\*Due Date:

01/22/2016

\*Request Committee:

Suggested Agency Assignment:

Previous Fiscal Note on Topic:

Bill Number:

Session Year:

Select...

Message History

Add to Msg List

MMB will not assign notes for amendments or unofficial bills until the language is attached.

No attachments found.

Browse...

Upload File

Save

Cancel



4. Select Chamber. The system will default to the legislative user's own chamber.
5. The fiscal note type defaults to Regular. If you are entering an Unofficial or Classified Unofficial request, select that type from the drop down menu. For more information, see the sections below on Unofficial and Classified fiscal notes.
6. Enter the bill number. Note: you must enter HF or SF before the number; for example, HF300 or SF400. Do not include the bill version. An error will occur if you do, since version has its own separate field.
7. Enter the bill version:
  - 0 – Introduction
  - 1A, 2A, etc. – Amendments
  - 1E, 2E, etc. – Engrossments
  - 1UE, 2UE, etc. – Unofficial Engrossments
  - 1CE, 2CE, etc. – Committee Engrossments
8. Select the bill's chief author from the drop down list in the Author field. If the author isn't known you may choose Author Unknown.
9. The due date defaults to eight business days from the create date. If you need a different due date, click once in the calendar field. Select a date from the calendar that pops up. To change the month on the calendar, click in the top left- or right-hand arrows of the calendar. Note: A due date of four or fewer days from the request date will be flagged as urgent and displayed in red text on the Search screen.



10. Select the requesting committee from the drop down.
11. The following fields are optional:
  - *Suggested Agency Assignment:* Use this if you know a specific agency or agencies that should be assigned to the note.

- *Previous Fiscal Note on Topic:* Use this if you are aware of previous fiscal note requests on this topic that may be helpful to the agencies preparing this note.
- If you wish to include a message, type your message in the Message History field. When finished, click the Add to Msg. List button. This field is designed to hold successive messages entered by a legislative user, EBO, or Budget Planning and Operations staff.

Message History

Add to Msg List

**Note: once a message has been added, it can't be edited or deleted.**

12. Click Save to complete the request.

## Requesting a Fiscal Note on Amended Bill Language

If you are requesting a fiscal note on an amendment to an introduced bill (i.e. the version number is 1A, 2A, etc.), you must upload a Word or PDF document of the amendment to FNTS. When the version number indicates the request is for an amendment, the system will not allow Budget Planning and Operations to retrieve or assign the request until the file is attached. You will receive email messages reminding you to attach the amendment language. The Attachment Required column on the Request Screen will also indicate “missing” until the file has been attached. Enter the request following steps one (1) through ten (10) above, and then continue:

1. Scroll to the Attached Files panel at the bottom of the Request screen. Click the Browse button and go to the directory in which you saved the language document. **Note:** It is helpful if the attach language name includes the bill number and version.

MMB will not assign notes for amendments or unofficial bills until the language is attached.

No attachments found.

Browse...

Upload File

2. Select the document by clicking on it, and then select Open. When the document path appears in the Browse field, select Upload File Button. When the file is successfully uploaded, the filename will be listed in the Attached Files panel. The Remove and View links will be displayed as shown in the illustration below. Click on the links to remove or view the attachment:

Attached Files		Remove	View
S9999-1E		<a href="#">Remove</a>	<a href="#">View</a> pdf

Browse...

Upload File

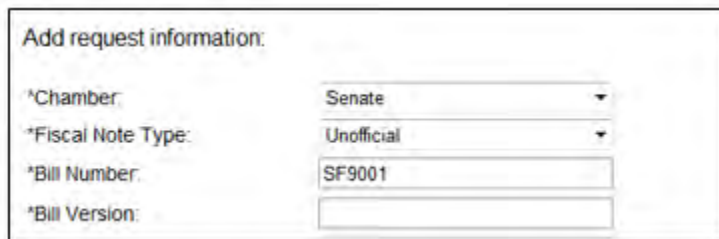
3. Click Save to complete the request.



## Requesting an Unofficial Fiscal Note

An “Unofficial Fiscal Note” is defined as a note requested on draft bill language that has not been introduced in either the House or the Senate (see [M.S. 13.64, Subd. 3\(a\)](#)).

1. To request an unofficial fiscal note, click the Add New button on the Request screen. Select the Chamber from the drop down list.
2. For Fiscal Note Type, select Unofficial. FNTS will automatically assign a bill number of 9000 or greater:



The screenshot shows a form titled "Add request information:". It contains four fields: "\*Chamber:" with a dropdown menu showing "Senate"; "\*Fiscal Note Type:" with a dropdown menu showing "Unofficial"; "\*Bill Number:" with a text input field containing "SF9001"; and "\*Bill Version:" with an empty text input field.

3. Enter the version number. This should always be Version 0.
4. Select the author and requesting committee, if known. You may also select Author Unknown or Unknown Committee if you are requesting a note in which the author or committee has not been established for this bill language.
5. Enter a due date. The due date defaults to eight business days from the create date. If you need a different due date, click once in the calendar field. Select a date from the calendar that pops up.
6. If you have specific agencies in mind for assignment, enter them in the “Suggested Agency Assignment” section.
7. If a fiscal note on the same topic was requested earlier in the session or in a previous session, then enter the bill number in the Previous Fiscal Note on Topic section. Be sure to indicate a session year.
8. In the Attached Files section, click Browse and navigate to where the bill language is saved. Select the language and click Open. Note that the path to the document is displayed in the browse field.

MMB Budget Planning and Operations cannot assign an unofficial fiscal note request unless the bill language is uploaded to FNTS. You may save the request at this point, but you will receive a system-generated email every day until language is attached. The “Attachment Required” column in the Request Screen will also indicate “missing” until the file has been attached.

9. Click Upload File to complete the attachment.
10. Click Save to complete the request.

## Requesting a Classified Fiscal Note

An unofficial fiscal note may be classified nonpublic, if directed by the requester (see [M.S. 13.64, Subd. 3\(b\)](#)). Classified notes require more stringent security measures:

- All legislative staff with access to the system may request a classified note, but only the requester can retrieve and view the request in FNTS Search.
  - The author and committee will default to “Unknown”, but the requester may select other values.
  - When MMB assigns the note, only users with Signoff Authority belonging to the assigned agency may view and prepare the note.
  - All EBOs can view any Classified Unofficial fiscal note.
  - Completed Classified fiscal notes are not posted to the web. A pdf of the completed note is emailed to the legislative requester and assigned agency coordinator(s), and may be viewed in the system by permitted users.
  - Classified notes are not included in system reports. Only the person who requested the note and the Agency Signoff users of assigned agencies can search and retrieve the record from Search Results and view the fiscal note.
  - An Unofficial Classified note remains nonpublic data unless it is subsequently used for an introduced bill, an amendment, or a proposed bill; then the note becomes public data.
1. To request a classified unofficial fiscal note, click the Add New button on the Request screen.
  2. For Fiscal Note Type, select Classified. FNTS will automatically assign a bill number in the 9000 series:

**Add request information:**

*Chamber:	House	▼
*Fiscal Note Type:	Regular	▼
*Bill Number:	HF	
*Bill Version:		

3. Enter the version number. This should always be Version 0.
4. The Author and Committee will default to Author Unknown and Unknown Committee. Different values may be selected from the drop-downs.
5. Enter a due date. The due date defaults to eight business days from the create date. If you need a different due date, click once in the calendar field. Select a date from the calendar that pops up.
6. If you have specific agencies in mind for assignment, enter them in the “Suggested Agency Assignment” section.

7. If a fiscal note on the same topic was requested earlier in the session or in a previous session, then enter the bill number in the Previous Fiscal Note on Topic section. Be sure to indicate a session year.
8. In the Attached Files section, click Browse and navigate to where the bill language is saved. Select the language and click Open. Note that the path to the document is displayed in the browse field.

MMB Budget Planning and Operations cannot assign an unofficial fiscal note unless bill language is attached. You may save the request at this point, but you will receive a system-generated email every day until language is attached. The “Attachment Required” column in the Request Screen will also indicate “missing” until the file has been attached.

9. Click Upload File to complete the attachment.
10. Click Save to complete the request.

### Modifying a Fiscal Note Request

Legislative users can modify a fiscal note request they have requested. The extent of the modifications depends on where the request is in the process.

1. First check to see where the Fiscal Note Request is in the process (status).
  - a. If no date is listed in the Retrieve Date Column on the Request screen, then the fiscal note is still a Legislative Request.
  - b. If a date is listed in the Retrieve Date Column on the Request screen, then this is a Retrieved Request.
  - c. If the request is no longer located on the Request screen, then the note is a Retrieved and Assigned Request.

	<a href="#">Bill Nbr</a>	<a href="#">Version</a>	<a href="#">Author</a>	<a href="#">Due Date</a>	<a href="#">Req. Committee</a>	<a href="#">Request Date</a>	<a href="#">Type</a>	<a href="#">Msg</a>	<a href="#">Attachment Required</a>	<a href="#">Retrieve Date</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Bill Text</a> <a href="#">Bill Status</a>	SF1522	2E	CLAUSEN, GREG	1/15/2018	FINANCE	1/4/2018 1:39:04 PM	Regular Fiscal Note		no		<a href="#">Edit</a>	<a href="#">Delete</a>

2. Legislative Request—MMB has not retrieved the request, so all fields are available for edit at this point with the exception of the bill number and version. The requester can modify the Author, Committee, or Due Date; add a message, suggest agencies to assign and enter bill numbers for other fiscal notes on the topic. The Request can also be deleted.

To edit or delete the request, click on the Edit or Delete links in the far right hand section of the record:

	<a href="#">Bill Nbr</a>	<a href="#">Version</a>	<a href="#">Author</a>	<a href="#">Due Date</a>	<a href="#">Req. Committee</a>	<a href="#">Request Date</a>	<a href="#">Type</a>	<a href="#">Msg</a>	<a href="#">Attachment Required</a>	<a href="#">Retrieve Date</a>	<a href="#">Edit</a>	<a href="#">Delete</a>
<a href="#">Bill Text</a> <a href="#">Bill Status</a>	SF1522	2E	CLAUSEN, GREG	1/15/2018	FINANCE	1/4/2018 1:39:04 PM	Regular Fiscal Note		no		<a href="#">Edit</a>	<a href="#">Delete</a>

3. Retrieved request—MMB has retrieved, but not assigned the request. *A request may not be deleted after it has been retrieved.* The requester may change the author, committee, due date, add a message, suggest agencies, note other fiscal notes on the topic, and add an attachment.
4. Retrieved and assigned request—MMB has assigned the request to an agency or agencies. The request is no longer available on the requester's summary of outstanding requests page. In order to modify this request, the requester must go to the Search screen and search for the fiscal note.
  - a. Using the Search function:
    - i. Click on Search in the left hand navigation pane.
    - ii. Enter the bill number and version, click the Search.
    - iii. Use any of the fields to search for the note you would like to modify. Enter the criteria on which you want to base your search. See the Search Options table in [Appendix B](#) for descriptions of search fields.

Bill nbr:	<input type="text"/>	Version:	<input type="text"/>	Session:	<input type="text" value="2019-20"/>
Assigned Date: From:	<input type="text"/>	to:	<input type="text"/>	Urgent:	<input type="text" value="Select..."/>
Due Date: From:	<input type="text"/>	to:	<input type="text"/>	<input type="checkbox"/> EBO Action Required <input type="checkbox"/> Agency Action Required <input type="checkbox"/> Show All Assigned Agencies	
Agency:	<input type="text" value="Select..."/>				
Agency Contact:	<input type="text"/>				
Agency Status:	<input type="text" value="Select..."/>				
Note Status:	<input type="text" value="Select..."/>				
Note Type:	<input type="text" value="Select..."/>				
Title:	<input type="text"/>				
EBO:	<input type="text" value="Select..."/>				
Requester:	<input type="text" value="Select..."/>				
Author:	<input type="text" value="Select..."/>				
Committee:	<input type="text" value="Select..."/>				
<input type="button" value="Search"/> <input type="button" value="Cancel"/> <input type="button" value="Clear Form"/>					

- b. Steps for modifying a request that has been assigned:
  - i. When the Search Results screen appears, click on the bill number or title to display the details of the note at the bottom of the screen.
  - ii. To modify the request, click on modify at the bottom of the Fiscal Note Status Detail screen. The requester may change the author, committee, due date, and add a message. ***The request may not be deleted, but can be inactivated if no longer needed.***

Agency Assignments								
Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date
E37	Education Department		Preliminary Data					

Attachments	
Attached Files	View
HF0316_FN_3A	<a href="#">View</a>

**Message History**

No Messages  
[Print Message History](#)

Inactivate
Modify
View

5. To add a message to a fiscal note, follow the steps above to search for the note.
  - a. On the Search Results screen, click on the bill number or title to open the note details at the bottom of the screen.
  - b. Click Modify.
  - c. In the Message History section, click Add. A blank space appears to allow you to enter a message. Enter your message. Click Save below the message box to add the message to the request.

Agency Assignments									
Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date	
E37	Education Department		Preliminary Data						Edit
									Add New

Attachments	
Attached Files	Extension
HF0316_FN_3A	<a href="#">View</a> docx

Enter a new message

Save
Cancel

**Message History**

[Add](#)

- d. Once the Message is added to the fiscal note, click save at the bottom of the screen to complete the modification to the request.

## Viewing and Printing a Fiscal Note

1. To view a fiscal note, open the Search screen. Enter the bill number and version; click the Search button.
2. Select the note you wish to view by clicking on the bill number or title to display the Details at the bottom of the screen.
3. To view a note:
  - a. To view an individual note, click on the agency number to highlight the line, then click View.

**Agency Assignments**

Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date
<a href="#">G67</a>	Revenue Dept	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
<a href="#">H55</a>	Human Services Department	<input checked="" type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
<a href="#">B15</a>	Barber Examiners Board	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
<a href="#">E37</a>	Education Department	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017

**Attachments**  
 No attachments found.

**Message History**  
 No Messages  
[Print Message History](#)

[View Consolidated](#)
[View](#)

- b. To view a Consolidated Fiscal Note, click on View Consolidated.

**Agency Assignments**

Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date
<a href="#">G67</a>	Revenue Dept	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
<a href="#">H55</a>	Human Services Department	<input checked="" type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
<a href="#">B15</a>	Barber Examiners Board	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
<a href="#">E37</a>	Education Department	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017

**Attachments**  
 No attachments found.

**Message History**  
 No Messages  
[Print Message History](#)

[View Consolidated](#)
[View](#)

4. A separate browser tab will open to display the note. The note will display a print preview in PDF format. From there you may save the file to your local drive or desktop, or use your browser's Print function to print a hard copy of the note. **Note:** You will not be able to view a fiscal note if it is in Agency Draft Status; while in Draft status, only FNTS users belonging to that agency can view the fiscal note. To view the note while it is being prepared by the agency, please contact the agency and ask if the note's agency status can be changed to Preliminary.



## Chapter 4: Agency User - Email, Preparation and Signoff of a Fiscal Note

### Agency Email Notification Maintenance

Agencies are responsible for updating their agency email notification list. MMB does not edit entries or remove email addresses from any agency's email notification list unless an email is returned because it can't be delivered.

To add contacts to the Agency Email Notification,

1. In the Maintenance section of the FNTS menu, click on the Agency Email Notification link. The Email Notification Maintenance screen will appear.
2. To add the email address of a contact who is not an authorized FNTS user, type the address in the Email field. Click Save. The email will be saved to the list.

The screenshot shows the 'Agency Email Notification Maintenance' interface. At the top, it says 'Email Notification List for Testing Agency'. Below this is a table with two columns: 'Email' and an action column. The table contains two rows with email addresses: 'deedebo@state.mn.us' and 'metcouncil\_agency@state.mn.us'. To the right of the second row is an 'Add' link. Below the table, there is a section for 'Extra email/pager notification:' which includes an 'Email' input field, a 'Save' button, and a 'Cancel' button. A red dashed box highlights the 'Add' link and the 'Email' input field.

3. To add the email address of an FNTS system user, click the Add link and a list of system emails will appear; you may choose off the list by clicking in the checkbox next to the desired email. Click Save (located to the right of the list—you might have to scroll down to find it).

This screenshot is similar to the previous one, showing the 'Agency Email Notification Maintenance' interface. It includes the same table with email addresses and the 'Add' link. The 'Extra email/pager notification:' section is also present. A red dashed box highlights the 'Add' link.

**Agency Email Notification Maintenance**

Email Notification List for Testing Agency

[Email](#)

deedebo@state.mn.us	
metcouncil_agency@state.mn.us	
<input type="checkbox"/> 5010_agencyso@state.mn.us	
<input type="checkbox"/> 504@state.mn.us	
<input type="checkbox"/> agencyprepare@test.org	
<input type="checkbox"/> agencysignoff@test.org	
<input type="checkbox"/> agfinancehleguser@state.mn.us	
<input type="checkbox"/> b15so@state.mn.us	
<input type="checkbox"/> commercetest@state.mn.us	
<input type="checkbox"/> deedsignoff@state.mn.us	

[Save](#) [Cancel](#)

Extra email/pager notification:

Email

- To remove someone from the list, click the delete button on the line of the email you would like to delete.

For a list of FNTS automatic emails, please see [Appendix A](#) at the end of this document.

## Preparing a Fiscal Note

### Searching for Fiscal Notes Needing Completion

- Select Search from the Home Page menu on the left. The Search screen below appears:

HOME > Search

Logged As: Q99 Test2 Agency Signoff

Bill nbr:  Version:  Session: 2019-20

Assigned Date: From:  to:  Urgent: Select...

Due Date: From:  to:

Agency: Select...

Agency Contact:

Agency Status: Select...

Note Status: Select...

Note Type: Select...

Title:

EBO: Select...

Requester: Select...

Author: Select...

Committee: Select...

☒ Agency Action Required

☐ Show All Assigned Agencies

- Check the Agency Action Required box and click the Search button or you may enter the specific Bill Nbr and version. See Chapter 5 or Appendix B for details on the Search screen.



- If you checked the Agency Action Required box, the Search Results screen will show all fiscal notes needing preparation by your agency. The fiscal note preparation begins on this screen.
- Choose the note you will prepare by selecting a fiscal note and clicking on either the Bill Nbr (bill number) or Note Title link.

Session: 2019-2020

Bill Info	Bill Nbr	Revised	Note Title	Agency Nbr	Agency Name	Note Status	Agency Status	Consolidated	Note Type	Due Date	Comp Bill
<a href="#">Test Status</a>	<a href="#">HF59-0</a>		<a href="#">Agency Dec 4 AM Training Exercise 1 and 2</a>	R32	Pollution Control Agency	In Process	Agency Draft	Y	Regular Fiscal Note	11/26/2018	<a href="#">SF515</a>
<a href="#">Status</a>	<a href="#">HF59-1A</a>		<a href="#">Agency Dec 4 AM Training Exercise 3</a>	R32	Pollution Control Agency	In Process	Agency Draft	Y	Regular Fiscal Note	11/21/2018	
<a href="#">Test Status</a>	<a href="#">HF81-0</a>		<a href="#">Agency Dec 6 PM Training Exercise 1 and 2</a>	B13	Commerce Dept	In Process	Agency Draft	Y	Regular Fiscal Note	12/31/2018	<a href="#">SF508</a>
<a href="#">Test Status</a>	<a href="#">HF235-0</a>	Y	<a href="#">Renewable Dev Act1 Solar Incent Terminate</a>	B13	Commerce Dept	In Process	Agency Draft		Regular Fiscal Note	1/9/2019	
<a href="#">Test Status</a>	<a href="#">HF999-0</a>	Y	<a href="#">Renewable Dev Act1 Solar Incent Terminate</a>	B13	Commerce Dept	Complete	EBO Signed Off		Regular Fiscal Note	1/9/2019	
<a href="#">Test Status</a>	<a href="#">HF1061-0</a>		<a href="#">Agency Dec 12 AM Training Exercise 1 and 2</a>	H55	Human Services Department	In Process	Agency Draft	Y	Regular Fiscal Note	12/31/2018	<a href="#">SF911</a>
<a href="#">Test Status</a>	<a href="#">HF2477-0</a>		<a href="#">Agency Dec 13 PM Training Exercise 1 and 2</a>	E37	Education Department	In Process	Agency Draft	Y	Regular Fiscal Note	12/3/2018	<a href="#">SF2214</a>
<a href="#">Test Status</a>	<a href="#">SF123-0</a>		<a href="#">Agency Training Exercise 1 and 2</a>	B42	Labor And Industry Dept	Inactive	Agency Draft	Y	Regular Fiscal Note	11/29/2018	
<a href="#">Test Status</a>	<a href="#">SF508-0</a>		<a href="#">Agency Dec 6 PM Training Exercise 1 and 2</a>	B13	Commerce Dept	In Process	Agency Draft	Y	Regular Fiscal Note	12/31/2018	<a href="#">HF81</a>
<a href="#">Status</a>	<a href="#">SF508-1A</a>		<a href="#">Agency Dec 6 PM Training Exercise 3</a>	B13	Commerce Dept	In Process	Agency Draft	Y	Regular Fiscal Note	12/3/2018	
<a href="#">Test Status</a>	<a href="#">SF515-0</a>		<a href="#">Agency Dec 4 AM Training Exercise 1 and 2</a>	R32	Pollution Control Agency	In Process	Agency Draft	Y	Regular Fiscal Note	11/26/2018	<a href="#">HF59</a>
<a href="#">Test Status</a>	<a href="#">SF911-0</a>		<a href="#">Agency Dec 12 AM Training Exercise 1 and 2</a>	H55	Human Services Department	In Process	Agency Draft	Y	Regular Fiscal Note	12/3/2018	<a href="#">HF1061</a>

- The Fiscal Note Status Details for the selected note, and system function buttons available to the user, will appear at the bottom of the Search Results screen.

**Fiscal Note Status Details for Bill Number SF2392**

Bill Number:	SF2392-1A	Comp Bill:	
Title:	Consolidated Test	Requester:	<a href="#">Admin1 Budops1 (651)-333-3370</a>
Note Type:	Regular Fiscal Note	Requesting Committee:	FINANCE
Author:	RICHARD COHEN (651)-296-5931	Request Date:	10/29/2014 2:23:31 PM
Analyst:	<a href="#">Leguser1 Senate (651)-333-3333</a>	Retrieval Date:	11/14/2014 2:19:32 PM
Note Status:	In Process	Assign Date:	11/14/2014 2:19:46 PM
Consolid. FN Status:	In Process	Due Date:	11/6/2014
Agency Status:	Preliminary Data	Complete Date:	
Agency Contact:	Program Director (612) 452-9856	Attachment:	S9999-1E
FN Coordinator:	<a href="#">H12 Coord Signoff (651)-297-1902</a>		<a href="#">View</a>
Agency Signoff:			
Agency EBO:	<a href="#">Health_ebo EBO6 (651)-333-3364</a>		
Lead EBO:	<a href="#">Health_ebo EBO6 (651)-333-3364</a>		

**Agency Assignments**

Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff	Agency Signoff Date	EBO Signoff	EBO Signoff Date
<a href="#">G39</a>	Governor, Office of the	<input type="checkbox"/>	Agency Draft					
<a href="#">H12</a>	Health	<input checked="" type="checkbox"/>	Preliminary Data					
<a href="#">T79</a>	Transportation	<input type="checkbox"/>	Agency Draft					

**Message History**

No Messages  
[Add](#)   [Print Message History](#)



[Signoff](#)   [View Consolidated](#)   [View](#)   [Prepare](#)

6. The Agency Assignments appear in the bottom half of the note's Status Details panel. If it's a consolidated note, the Lead Agency is highlighted and has a check in the "Lead" box next to the agency name. The other assigned agencies and their agency status are also displayed.
  - a. To view the consolidated note, click on the View Consolidated button.
  - b. To view the fiscal note of any single agency assigned to the note, click on the Agency Number link to highlight the row and then click the View button. The View button will not display if that agency has an agency status of "Agency Draft" unless you are a user from that agency.

## Prepare Screen

1. To prepare the note, click on the Prepare button (visible only if your agency is highlighted). The Prepare Screen will display.

The default view displays Sections 1 through 6 expanded; scroll to see each section. The page

view can also be collapsed by clicking on the  at the far right hand side of the screen. Click the  to expand the section again.

**Figure 1 Prepare Screen with Fiscal Sections Collapsed**

☐ Copy from existing note

**Section1 - Fiscal Note Header**

Bill Number: HF9010 - 0

Agency Name: Testing Agency

Agency Contact:

Title:

Test EBO Assign

Due Date: 08/24/2017

FN Coordinator: Q99 Coordinator (111-222-3333)

Agency Signoff:

FN Status: In Process

Agency Status:

☒ Agency Draft

☐ Preliminary

**Section2- Fiscal Impact**
☐ No Impact (Sets all fiscal impact buttons to "NO" ; an explanation is required in the Assumptions narrative.)

The following five fiscal impact questions must be answered before an agency can sign off on a fiscal note.

Yes No

☐ ☐ State Expenditures - Does this bill have an impact on your Agency's spending?

☐ ☐ Fee/Dept Earnings - Does this bill impact an Agency Fee or Dept. Earning?

☐ ☐ Tax Revenue - Does this bill impact State Tax Revenues?

☐ ☐ Information Technology - Does this bill impact your Agency's information technology systems?

☐ ☐ Local Impact - Does this bill have a fiscal impact on a Local Government Body?

**Section 3- Expenditures, Absorbed Costs, Transfer Out**
**Section 4 - Revenues and Transfers In**
**Section 5 - State Cost (Savings) (3.4 - 4.3) - (Dollars in Thousands (000))**
**Section 6**

Full-Time Equivalent Positions (FTE)

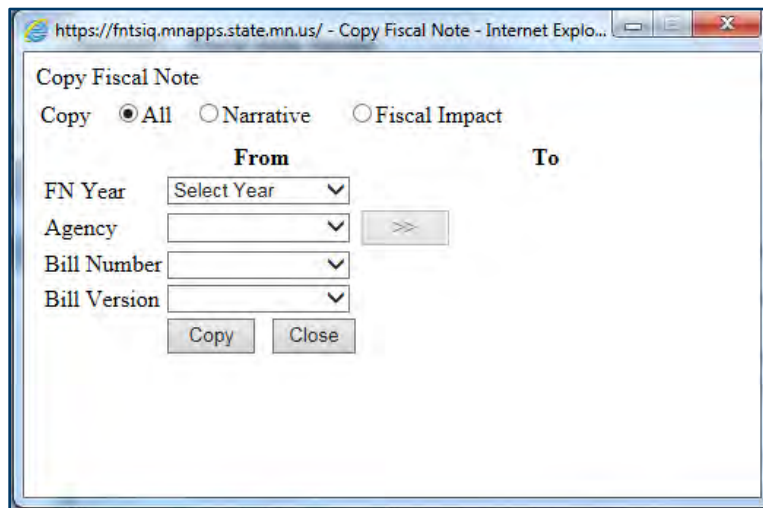
**Section 7 Narrative**

a. Copy from Existing Note.

- i. If an earlier version of this fiscal note exists, or if another note on the same topic exists, you may copy that information into the note you are preparing.

☐ Copy from existing note

- ii. Click in the check box. The Copy dialog box appears. Choose what you want to copy—all of the note, just the narrative, or just the fiscal data.



- iii. Select the fiscal note year.
- iv. Select the Agency—if you have access to more than one agency, choose it from the list. Otherwise, choose your own.
- v. Enter the Bill Number or select it off the drop down list.
- vi. Enter the Bill Version of the bill number and click Copy.
- vii. The data you selected will be copied into the note you are preparing. Any prior signoffs by agency or EBO will not be copied. The screen should also say “Copied Successfully” in Green after the copy has been completed.
- viii. Edit the fiscal note as necessary. You will need to save and sign off on the note when your editing is complete.

2. Section 1 – Fiscal Note Header

- a. The Header Section contains information carried over from the request/assignment: bill number, title, due date, assigned agency name, etc. In the Agency Contact field, enter both the name and phone number of the person to whom questions about the note should be directed: First Name Last Name (xxx) xxx-xxxx. This is an optional field.

- b. The column on the right displays the Agency Status. The default status is Agency Draft. When this is checked, only FNTS users within your agency are able to see the fiscal note as it is developed. When you are finished with the note, or are ready for others to see it, change the status from Draft to Preliminary. This will give others read-only access to the note.

<b>Section1 - Fiscal Note Header</b>			
Bill Number: HF9010 - 0	Title: Test EBO Assign	Due Date: 08/24/2017	
Agency Name: Testing Agency	FN Coordinator: Q99 Coordinator (111-222-3333)	FN Status: In Process	
Agency Contact: <input type="text"/>	Agency Signoff:	Agency Status: <input checked="" type="radio"/> Agency Draft	<input type="radio"/> Preliminary

### 3. Section 2 – Fiscal Impact

- a. All of the indicators in this section must be checked either Yes or No before the Open Narratives button can be enabled and before the agency can save and sign off on the note.

<b>Section2- Fiscal Impact</b>	
<input type="checkbox"/> No Impact (If selected needs to add all Fiscal Impact buttons will automatically be checked "NO" and Narrative is required to explain the reason.)	
The following five fiscal impact questions must be answered before an agency can sign off on a fiscal note.	
Yes No	
<input type="radio"/> <input type="radio"/>	State Expenditures - Does this bill have an impact on your Agency's spending?
<input type="radio"/> <input type="radio"/>	Fee/Dept Earnings - Does this bill impact an Agency Fee or Dept. Earning?
<input type="radio"/> <input type="radio"/>	Tax Revenue - Does this bill impact State Tax Revenues?
<input type="radio"/> <input type="radio"/>	Information Technology - Does this bill impact your Agency's information technology systems?
<input type="radio"/> <input type="radio"/>	Local Impact - Does this bill have a fiscal impact on a Local Government Body?

- b. If this bill has no fiscal impact to your agency, you may click the No Impact checkbox. Immediately, all five indicators will be checked "No".

When this box is checked, an explanation of why there is no impact is required before you sign off on the note. The explanation must be entered in the Assumptions section of the narrative.

### Figure 2 No Impact Checked

<b>Section2- Fiscal Impact</b>	
<input checked="" type="checkbox"/> No Impact (If selected needs to add all Fiscal Impact buttons will automatically be checked "NO" and Narrative is required to explain the reason.)	
The following five fiscal impact questions must be answered before an agency can sign off on a fiscal note.	
Yes No	
<input type="radio"/> <input checked="" type="radio"/>	State Expenditures - Does this bill have an impact on your Agency's spending?
<input type="radio"/> <input checked="" type="radio"/>	Fee/Dept Earnings - Does this bill impact an Agency Fee or Dept. Earning?
<input type="radio"/> <input checked="" type="radio"/>	Tax Revenue - Does this bill impact State Tax Revenues?
<input type="radio"/> <input checked="" type="radio"/>	Information Technology - Does this bill impact your Agency's information technology systems?
<input type="radio"/> <input checked="" type="radio"/>	Local Impact - Does this bill have a fiscal impact on a Local Government Body?

- c. If there is a fiscal impact in the bill, check "Yes" for all that apply:
  - i. State Expenditures: Will this bill have any effect on your agency's operating budget?
  - ii. Fee/Dept. Earnings: Does this bill impact any fees or service charges your agency collects? Does it require a new fee to be collected by your agency?

- iii. Tax Revenue: Does this bill have any impact on tax revenues? If “Yes”, then supporting narrative should include any assumptions and formula used in estimating the tax revenue.
- iv. Information Technology: Does this bill affect any agency technical systems? Will changes be required or new technology need to be developed?
- v. Local Impact: Does this bill have a fiscal impact to a county, municipality, or other local government entity? If you indicate “Yes”, please explain the impact in the Local Government Costs section of the narrative. It is not necessary to enter a dollar amount.

#### 4. Section 3 – Expenditures, Absorbed Costs, Transfer Out



- This section requires the agency to enter their dollar amounts in thousands.
- Use 0 or whole numbers when entering data.

Section 3- Expenditures, Absorbed Costs, Transfer Out								
3.1 Expenditures (Dollars in Thousands (000))								
FUND	FUND NAME	2019	Biennium		Biennium		Edit	Delete
			2020	2021	2022	2023		
<input type="button" value="Add Row"/>								
3.2 Costs Agency Absorb (Dollars in Thousands (000))								
FUND	FUND NAME	2019	Biennium		Biennium		Edit	Delete
			2020	2021	2022	2023		
<input type="button" value="Add Row"/>								
3.3 Transfers Out (Dollars in Thousands (000))								
FUND	FUND NAME	2019	Biennium		Biennium		Edit	Delete
			2020	2021	2022	2023		
<input type="button" value="Add Row"/>								
3.4 Expenditures, Absorbed Costs, Transfer Out (Sum of 3.1, 3.2, 3.3) - (Dollars in Thousands (000))								
FUND	FUND NAME	2019	Biennium		Biennium			
			2020	2021	2022	2023		



- a. Section 3.1 – Expenditures. Click Add Row. From the drop down that appears in the Fund column, select a fund code. The fund name will automatically appear. Enter 0 in the fiscal years where there is no impact; enter dollars in thousands where there is impact. To create another row for a different fund, click the Add Row button again and enter dollar amounts. You must click Save at the end of the line before proceeding to Section 3.2.

Section 3- Expenditures, Absorbed Costs, Transfer Out								
3.1 Expenditures (Dollars in Thousands (000))								
FUND	FUND NAME	2019	Biennium		Biennium		Edit	Delete
			2020	2021	2022	2023		
<input type="button" value="Add Row"/>								

- b. Section 3.2 – Costs Agency Absorbs. This section is optional and can be used at the agency’s discretion. If the expenditures (some or all) you entered in 3.1 are part of an existing program and your agency can absorb the costs, click Add Row. Notice that only the fund(s) you entered in section 3.1 appear in the drop-down list; you cannot absorb costs in a different fund than you expend. Enter the dollar amounts in thousands and click Save. Note: This section already has the reduction calculation so do not enter a negative value.

3.2 Costs Agency Absorb (Dollars in Thousands (000))								
FUND	FUND NAME	Biennium			Biennium		Edit	Delete
		2019	2020	2021	2022	2023		
1000	General	<0>	<20>	<20>	<25>	<25>		

- c. Section 3.3 – Transfers Out. This section is used when the bill appropriates money that the agency is required to transfer out to another fund or requires a transfer of existing appropriations between government funds. In a consolidated note, the receiving agency should enter the corresponding dollar amount in the Transfers In row in their portion of the fiscal note. Click Add Row; notice that you may choose a different fund from 3.1 if appropriate. Save when you are finished with the row.





3.3 Transfers Out (Dollars in Thousands (000))								
FUND	FUND NAME	Biennium			Biennium		Edit	Delete
		2019	2020	2021	2022	2023		
1000		0	0	0	0	0		
							<input type="button" value="Save"/>	<input type="button" value="Cancel"/>
<input type="button" value="Add Row"/>								

- d. Section 3.4 – Expenditures, Absorbed Costs, Transfers Out (3.1 + 3.2 + 3.3). This section is read-only and displays the sum of the total expenditures, absorbed costs, and transfers you entered above. The fields in this row are populated and updated as you enter and save data in sections 3.1 to 3.3.

## 5. Section 4 - Revenues and Transfers In

This section must be completed when a bill impacts revenues such as state tax revenue or departmental earnings (fees or charges).

- Enter data in Section 4 following the same basic procedure described above for Section 3: click Add Row, select a fund, enter dollar amounts in each column, and click Save.
- As in Section 3, all dollars are entered in thousands.

Section 4 - Revenues and Transfers In								
4.1 Revenues (Dollars in Thousands (000))								
FUND	FUND NAME	Biennium			Biennium		Edit	Delete
		2019	2020	2021	2022	2023		
								
<input type="button" value="Add Row"/>								
4.2 Transfers In (Dollars in Thousands (000))								
FUND	FUND NAME	Biennium			Biennium		Edit	Delete
		2019	2020	2021	2022	2023		
								
<input type="button" value="Add Row"/>								
4.3 Revenues and Transfers In (4.1 + 4.2) - (Dollars in Thousands (000))								
FUND	FUND NAME	Biennium			Biennium			
		2019	2020	2021	2022	2023		



- a. Section 4.1 – Revenues. Enter the dollar amount of the bill’s impact on revenues. Click Add Row and select a fund. Enter 0 in the fiscal years where there is no impact; enter dollars in thousands where there is impact. Click Save. If more than one line is needed, click Add Row and enter data.

Section 4 - Revenues and Transfers In 4.1 Revenues (Dollars in Thousands (000))								
FUND	FUND NAME	2019	Biennium		Biennium		Edit	Delete
			2020	2021	2022	2023		
1000	General	0	5	5	5	5		
<input type="button" value="Add Row"/>								

- b. Section 4.2 – Transfers In. This field is required for Single Agency fiscal notes when a dollar amount is entered in 3.3 (Transfers Out). The total Transfers In, less total of Transfers Out must equal 0.

**Note:** For a consolidated fiscal note, a transfer in is optional for any single agency, but required for at least one agency when any agency has entered data in 3.3 (Transfers Out). Transfers In minus Transfers Out must equal 0.

4.2 Transfers In (Dollars in Thousands (000))								
FUND	FUND NAME	2019	Biennium		Biennium		Edit	Delete
			2020	2021	2022	2023		
1000	General	0	10	10	10	10		
<input type="button" value="Add Row"/>								



- c. Section 4.3 – Revenues and Transfers In (4.1 + 4.2). This read-only section displays the sum of revenues and transfers in. The fields in this row are populated and updated as you enter and save data in sections 4.1 and 4.2.

4.3 Revenues and Transfers In (4.1 + 4.2) - (Dollars in Thousands (000))						
FUND	FUND NAME	2019	Biennium		Biennium	
			2020	2021	2022	2023
1000	General	0	15	15	15	15

- Section 5 - State Cost (Savings) (3.4 minus 4.3). This read-only section displays the total fiscal impact of the bill, which is the difference between the calculation in section 3.4 (the sum of expenditures, absorbed costs, and transfers out) and the calculation in section 4.3 (the sum of revenues and transfers in).

Section 5 - State Cost (Savings) (3.4 - 4.3) - (Dollars in Thousands (000))						
FUND	FUND NAME	Biennium			Biennium	
		2019	2020	2021	2022	2023
1000	General	100	90	115	135	160

- Section 6 – Full Time Equivalent Positions (FTE). Enter data in this section if the legislation’s state fiscal impact affects agency personnel. You may only enter data in section 6 if expenditures have been entered in section 3.1. Click Add Row. The list of funds in the drop down is limited to the fund(s) entered in section 3.1. Enter FTE amounts in positive or negative whole numbers or as number with two decimal places (Example: 2.25 or 3.00). Amounts less than one must be entered with a preceding zero, for example: 0.75.

Section 6 Full-Time Equivalent Positions (FTE)								
FUND	FUND NAME	Biennium			Biennium		Edit	Delete
		2019	2020	2021	2022	2023		
1000	General	0.00	0.15	0.20	0.25	0.30		

## Entering a Narrative

- Section 7 – Narrative

The purpose of the fiscal note’s narrative is to clearly and concisely explain the assumptions and rationale behind the agency’s expenditure, revenue, and FTE estimates. Narratives should be carefully documented and written for a general audience. Do not include Bill number information in any of the narrative sections. This will cause issues with any bills that have companions since the system copies this information into the companion note.

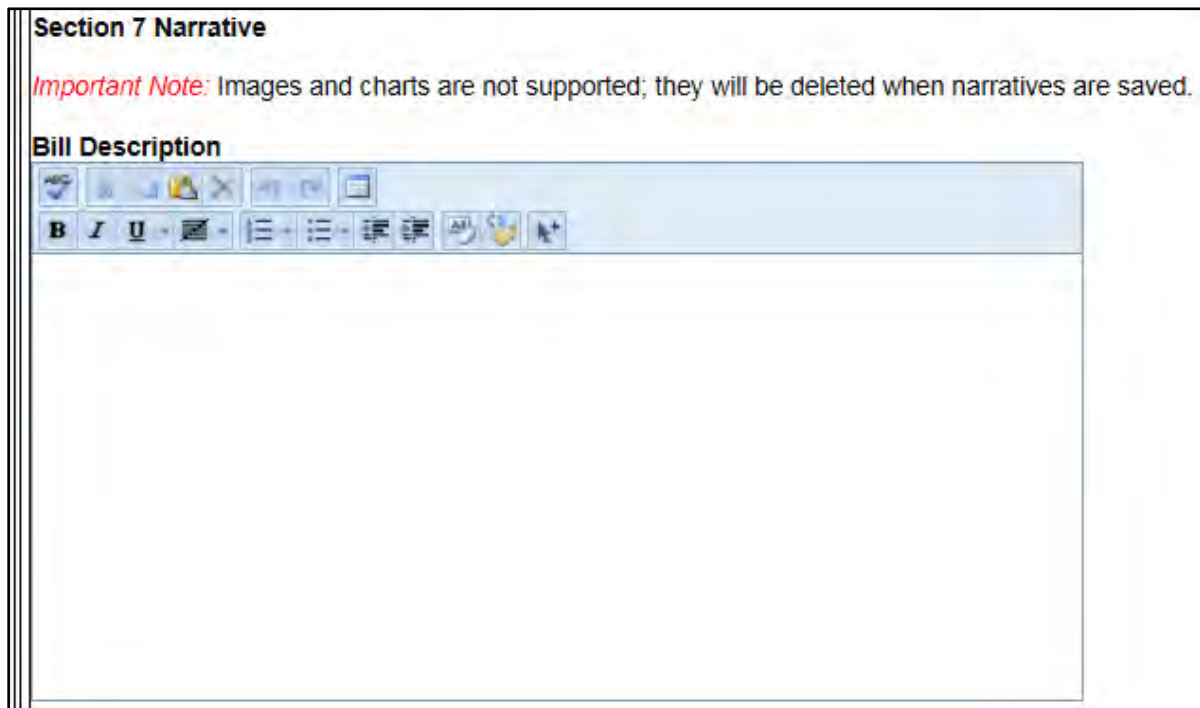
### Section 7 Narrative

Open Narratives

The Open Narratives button will be disabled until the Fiscal Impact radio buttons have been selected. Click on the Open Narratives button in Section 7 to display the text fields/boxes for the six components of the narrative: Bill Description; Assumptions; Expenditure and/or Revenue Formula; Long-Term Fiscal Considerations; Local Fiscal Impact; and References/Sources.



- a. The text field for the Bill Description is displayed here.

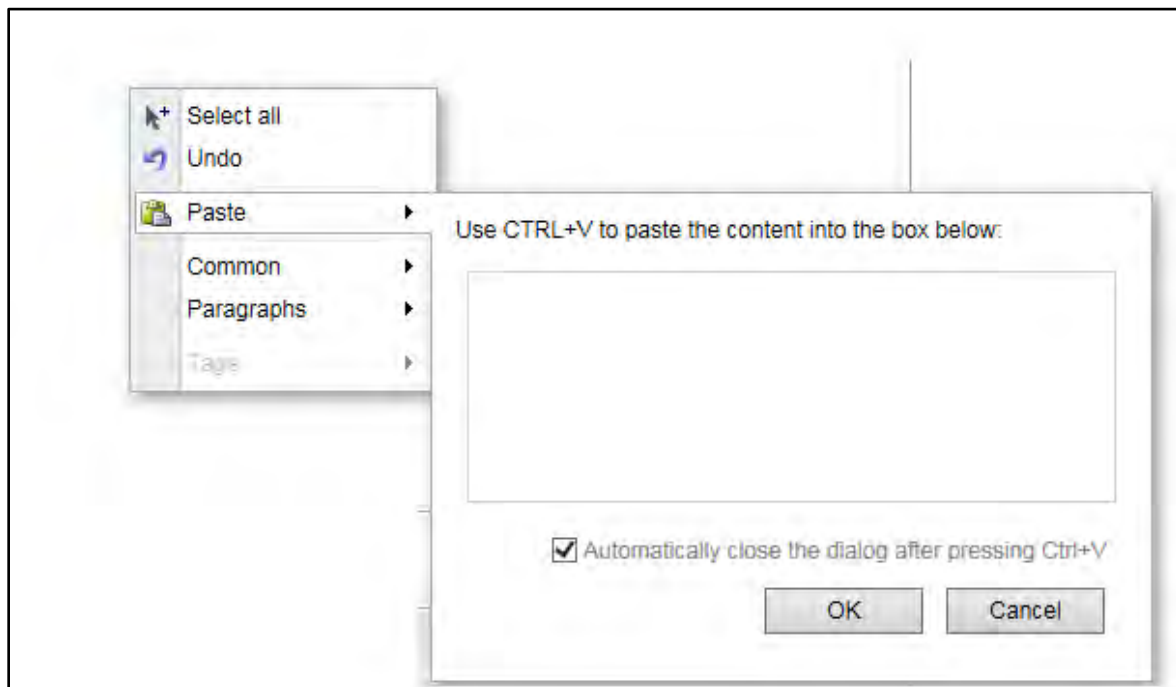


The screenshot shows a web form titled "Section 7 Narrative". Below the title is a red "Important Note" stating: "Images and charts are not supported; they will be deleted when narratives are saved." Underneath is a section labeled "Bill Description" which contains a large text area. Above the text area is a rich text editor toolbar with icons for bold, italic, underline, bulleted list, numbered list, link, unlink, and other formatting options.

- b. You may begin typing by clicking in the upper left hand corner of the text field.

-OR-

If your narrative is in a Word document, copy the text and paste it into the text box in the fiscal note. To paste, right click in the text box and hover over Paste in the menu. Follow the paste instructions in the dialog that pops up and click OK.



- c. Follow the same procedure for the rest of the fiscal note narrative; leave blank or type N/A in any text box not applicable.

A few things to remember about completing the narrative section:

- If you checked “No Impact” in Section 2 (Fiscal Impact Indicators), the system will require you to enter your rationale in the Assumptions text box before you can save.
- If you indicated “Local Impact” in Section 2, the system will require you to enter a description of the impact to local units of government in the Local Fiscal Impact text box. It is not necessary to enter dollar amounts in this section.
- **Do not copy from an Acrobat PDF, email text, or any document other than a Word or Excel document.** When pasted into the FNTS textboxes, this content can cause system issues, as well as formatting issues with the fiscal note pdf document.
- **The narrative textboxes do not support copying and pasting charts or other graphics.** Charts and graphs must be converted to a table format in Word or Excel and then copied and pasted into the textboxes.

The agency will prepare the note and click the Save button once it has been completed. It is recommended that agencies click Save every five to ten minutes when entering a lengthy fiscal note to ensure that data is saved.

### Email EBO Pre-Signoff Review

If an agency would like an EBO to review the note prior to signing off, it can use the “Email EBO for pre-signoff review” button at the bottom of the Prepare screen. This function is designed chiefly to allow an agency to share the note with its EBO while keeping the note in Agency Draft status so that the note is not viewable by other system users.



When this button is clicked, a pdf is created and emailed to the assigned EBO as an attachment. The button remains visible until the agency signs off on the note so it can be used to request an EBO’s review while the note is in either Draft or Preliminary status.

### Viewing and Printing Fiscal Notes

An agency user may view its own fiscal notes from the Prepare screen. Click on the View button to generate the pdf fiscal note document, which can be printed or saved to a local directory or desktop.

**Section 7 Narrative**

[Open Narratives](#)

[Save](#)
[Cancel](#)
[View](#)
[Sign Off](#)
[Email EBO for pre-signoff review](#)

Saved successfully

All other system users may view fiscal notes selected from the Search screen. While a fiscal note is in Agency Draft status, only the FNTS users belonging to that assigned agency can view the fiscal note. In order for users outside of that agency to view and print the note, the Agency Status must be set to Preliminary.

In the example below, the Transportation Department has set Agency Status to Preliminary Data. The View and View Consolidated buttons are visible. Anyone with access to the system may view and print a copy of the fiscal note.

Agency Assignments								
Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff	Agency Signoff Date	EBO Signoff	EBO Signoff Date
<a href="#">G67</a>	Revenue Dept	<input type="checkbox"/>	Agency Signed Off		00637724	12/4/2014		
<a href="#">T79</a>	Transportation Dept	<input checked="" type="checkbox"/>	Preliminary Data					
<a href="#">T9B</a>	Metropolitan Council	<input type="checkbox"/>	Agency Draft					
<a href="#">G10</a>	Minn Management & Budget	<input type="checkbox"/>	Agency Signed Off		50400000	12/17/2014		

**Message History**

No Messages

[Add](#)
[Print Message History](#)

[Remove Signoff](#)
[View Consolidated](#)
[View](#)
[Prepare](#)

Metropolitan Council's fiscal note is in Draft status; no one outside of Metropolitan Council can view the Metropolitan Council's fiscal note.

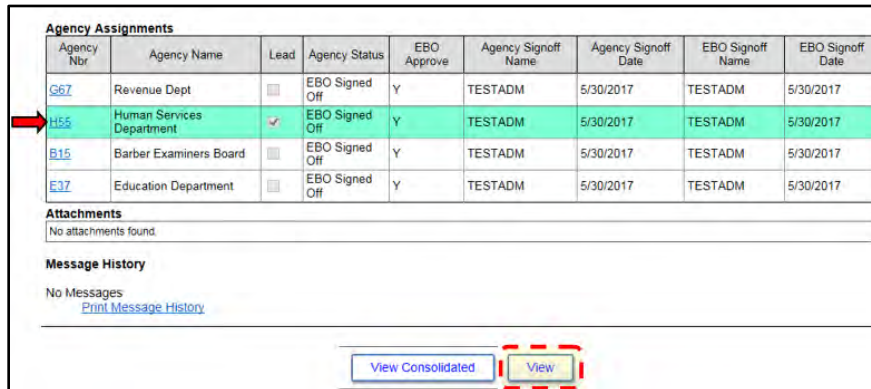
To view a fiscal note:

1. In the Search Results screen, choose the note you wish to view by clicking on the bill number or title.
2. Scroll down to see the Status Details of the selected note.

If the note is a single agency note and the agency status is not "Agency Draft", the View button will be visible.

If the note is a consolidated fiscal note, you may either click View to see the selected agency's note, or click View Consolidated to see the entire note. You will not see the View button when the selected agency's agency status is "Agency Draft."

- a. To view an individual note, click on the agency number to highlight the line, then click View.



The screenshot shows a table titled "Agency Assignments" with the following columns: Agency Nbr, Agency Name, Lead, Agency Status, EBO Approve, Agency Signoff Name, Agency Signoff Date, EBO Signoff Name, and EBO Signoff Date. The table contains four rows of data. The second row, for "Human Services Department" (Agency Nbr H55), is highlighted in green. A red arrow points to the "H55" agency number. Below the table, there are sections for "Attachments" (No attachments found) and "Message History" (No Messages, with a link to "Print Message History"). At the bottom, there are two buttons: "View Consolidated" and "View". The "View" button is highlighted with a red dashed box.

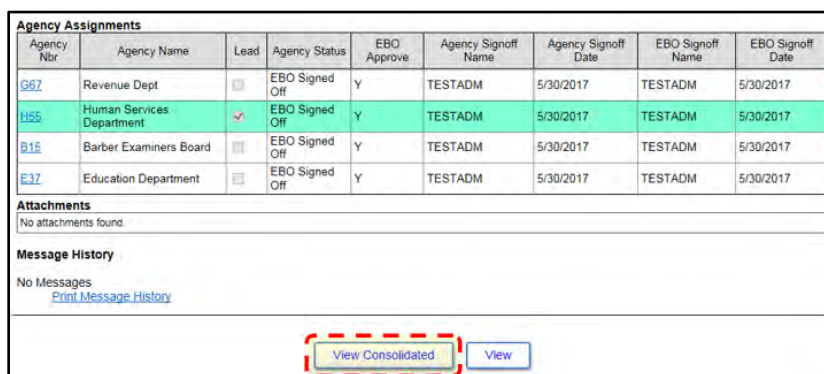
Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date
G67	Revenue Dept	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
H55	Human Services Department	<input checked="" type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
B15	Barber Examiners Board	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
E37	Education Department	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017

**Attachments**  
No attachments found.

**Message History**  
No Messages  
[Print Message History](#)

[View Consolidated](#) [View](#)

- b. To view a Consolidated Fiscal Note, click on View Consolidated.



This screenshot is identical to the one above, showing the "Agency Assignments" table with the "Human Services Department" row highlighted. However, in this version, the "View Consolidated" button at the bottom is highlighted with a red dashed box, and the "View" button is not visible.

Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date
G67	Revenue Dept	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
H55	Human Services Department	<input checked="" type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
B15	Barber Examiners Board	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017
E37	Education Department	<input type="checkbox"/>	EBO Signed Off	Y	TESTADM	5/30/2017	TESTADM	5/30/2017

**Attachments**  
No attachments found.

**Message History**  
No Messages  
[Print Message History](#)

[View Consolidated](#) [View](#)

3. A separate browser tab will open to display the note. The note will display a print preview in PDF format. From there you may use your browser's Print function to print a hard copy of the note.

**Note:** If the fiscal note is still being prepared by the agency and is in an Agency Status of 'Draft', the note will not appear in the Search Results. To view the note, please contact the agency.

## Sign Off on a Fiscal Note

Once an agency is finished preparing the fiscal note, it must be signed off in the system before your EBO can review and sign off on it. Agency sign off authority is required for a user to sign off on a fiscal note. You may sign off from either the Status Details or the Prepare screen.

### To sign off on a fiscal note

You may sign off from the Prepare Screen or the Status Detail screen.

1. To sign off from the Prepare screen:

- a. Click Save if you haven't already done so.
- b. Click the Sign Off button.

**Section 7 Narrative**

Open Narratives

Save Cancel View **Sign Off** Email EBO for pre-signoff review

- c. All other buttons disappear and the Sign Off button changes to Remove Signoff.
  - d. An email is sent to your EBO informing them that a fiscal note is ready for their review.
2. The process is similar when signing off from the Status Details screen:
    - a. Click the Signoff button.

**Agency Assignments**

Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date
Q99	Testing Agency		Agency Draft					

**Attachments**

Attached Files		View	Extension
fnts-tech-manual_tcm1059-127573		<a href="#">View</a>	pdf

**Message History**

No Messages

[Print Message History](#)

Signoff View Prepare

- b. The Signoff button changes to Remove Signoff.
- c. The Prepare button is visible, but further edits are not allowed until the sign off is removed.
- d. An email is sent to your EBO informing them that a fiscal note is ready for their review.

### To remove a sign off

1. Agencies may remove their own sign off by clicking the Remove Signoff button.
2. This action will put the note back into Agency Draft status and open the note up for edits.

**Note:** An agency is not able to remove their signoff if their EBO has already signed off. At that point, you must call your EBO and ask them to remove their sign off first.

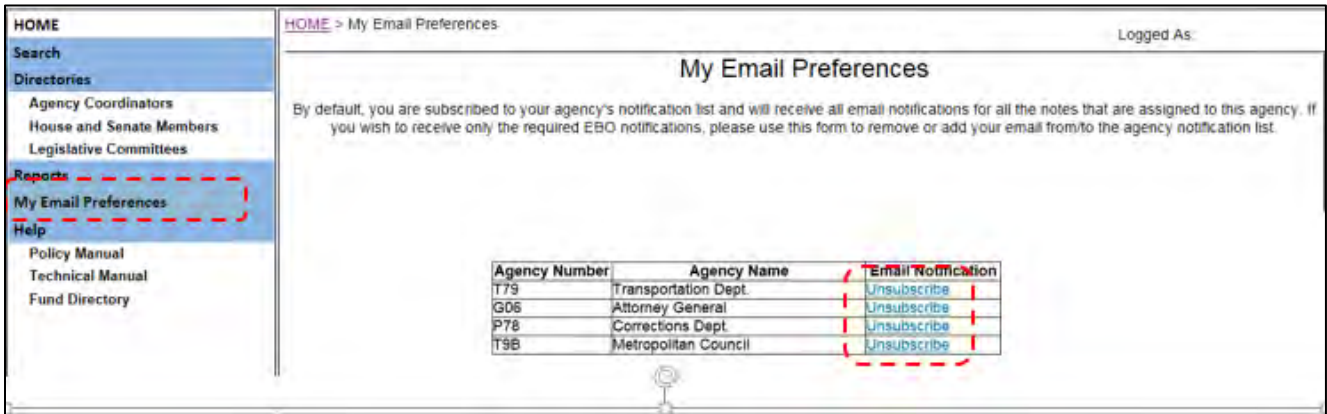
# Chapter 5: Executive Budget Officer User - Review and Signoff

## Email Notifications for Executive Budget Officers

### EBO Email Preferences

Executive Budget Officers are automatically entered on their assigned Agency Email Notifications. This means that EBOs will get the same emails as the fiscal note coordinator.

EBOs not wishing to receive agency emails can opt out by going to My Email Preferences and unsubscribing from the agency email notification.



### Pre-Signoff Notice

Agencies have an option to send a copy of their fiscal note for review prior to sign off by clicking on the Email EBO for pre-signoff review button:

Email EBO for pre-signoff review

When this button is clicked, a pdf is created and emailed to the assigned EBO as an attachment. This function is optional to agencies. The Note Status remains In Process, and the Agency Status stays in either Draft or Preliminary, whatever it was when the agency requested this email.

### Agency Signed Off

Agencies have primary responsibility for the accuracy and completeness of their fiscal notes; Executive Budget Officers review each agency fiscal note for reasonableness of content and consistency with MMB's fiscal note policies. In addition, the designated lead agency Executive Budget Officer reviews each consolidated fiscal note for conflicting assumptions, double counting, or omissions. Executive Budget Officers (EBOs) must review and sign off on all fiscal notes before they are transmitted to the Legislature.

Executive Budget Officers will receive a system generated email notification that a note has been signed off by the agency and is ready for review. EBOs will receive only one email per note.

A complete list of system-generated emails can be found in [Appendix A](#) at the end of this document.

## Fiscal Notes Requiring EBO Action

To retrieve fiscal notes ready for your review:

1. Go to the Search screen and click in the EBO Action Required check box.

2. Click Search. FNTS associates your user ID with your assigned agencies; no need to specify an agency unless you want to work on a specific agency's notes. Executing this type of search will retrieve a list of all fiscal notes ready for your review.
3. You may use any of the fields on the Search Screen instead of, or in addition to, the EBO Action Required box. Enter the criteria on which you want to base your search. See the Search Options table in [Appendix B](#) for descriptions of search fields.

### Search Results Screen.

1. When you have entered your search criteria, click the Search button to execute the search. The Search Results screen appears.

Fiscal Notes Tracking System											
HOME > Search > Search Results											
Session: 2019-2020											
Bill Info	Bill Nbr	Revised	Note Title	Agency Nbr	Agency Name	Note Status	Agency Status	Consolidated	Note Type	Due Date	Comp Bill
<a href="#">Text Status</a>	<a href="#">HF58-0</a>		<a href="#">Agency Dec 4 AM Training Exercise 1 and 2</a>	R32	Pollution Control Agency	In Process	Agency Draft	Y	Regular Fiscal Note	11/26/2018	<a href="#">SF515</a>
<a href="#">Status</a>	<a href="#">HF58-1A</a>		<a href="#">Agency Dec 4 AM Training Exercise 3</a>	R32	Pollution Control Agency	In Process	Agency Draft	Y	Regular Fiscal Note	11/21/2018	
<a href="#">Text Status</a>	<a href="#">HF81-0</a>		<a href="#">Agency Dec 6 PM Training Exercise 1 and 2</a>	B13	Commerce Dept	In Process	Agency Draft	Y	Regular Fiscal Note	12/31/2018	<a href="#">SF508</a>
<a href="#">Text Status</a>	<a href="#">HF235-0</a>	Y	<a href="#">Renewable Dev Acct: Solar Incent Terminate</a>	B13	Commerce Dept	In Process	Agency Draft		Regular Fiscal Note	1/9/2019	

2. The records on this screen may be sorted by clicking on the column headings; i.e., clicking on Due Date will sort the fiscal notes with the earliest due date on top. Other sort options are bill number or title.
3. To view the bill language, click on the link Text to the far left side of the screen. This will take you to the bill text on the legislative Office of the Revisor of Statutes' website.
4. To return to the Search screen for a new search or to return to the Home page, use the "breadcrumbs" at the top of the page, the navigation panel to the left of the screen, or your browser's back arrow.



5. Select a note to work on by clicking on the bill number or the title. The Status Details for the note appears at the bottom of the screen.

**Fiscal Note Status Details for Bill Number HF1882**

Bill Number:	HF1882-0	Comp Bill:	
Title:	Univ. Preschool 4 yr olds funding	Requester:	<a href="#">Mary Crosson (651)-201-8042</a>
Note Type:	Regular Fiscal Note	Requesting Committee:	EDUCATION FINANCE
Author:	FRANK HORNSTEIN	Request Date:	12/1/2014 4:33:20 PM
Analyst:	<a href="#">Melissa Johnson (651)-296-4178</a>	Retrieval Date:	12/1/2014 4:36:59 PM
Note Status:	Waiting for EBO Sign Off	Assign Date:	12/1/2014 4:38:58 PM
Consolid. FN Status:	In Process	Due Date:	12/9/2014
Agency Status:	Agency Signed Off	Complete Date:	
Agency Contact:	Mary Crosson (651-201-8042)		
FN Coordinator:	<a href="#">Judy Kuck (651)-201-2732</a>		
Agency Signoff:	<a href="#">Mary Crosson (651)-201-8042</a>		
Agency EBO:	<a href="#">Elizabeth Connor (651)-201-8041</a>		
Lead EBO:	<a href="#">Elizabeth Connor (651)-201-8041</a>		

**Agency Assignments**

Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff	Agency Signoff Date	EBO Signoff	EBO Signoff Date
<a href="#">E37</a>	Education Department	<input checked="" type="checkbox"/>	Agency Signed Off		01062802	12/10/2014		
<a href="#">H12</a>	Health Dept	<input type="checkbox"/>	Agency Draft					
<a href="#">H55</a>	Human Services Dept	<input type="checkbox"/>	Agency Draft					

**Message History**

No Messages  
[Add](#)   [Print Message History](#)

[Signoff/Remove Signoff](#)   [View Consolidated](#)   [View](#)

6. To view the note, click on the agency number to highlight the row. Then click View (or View Consolidated if you are signing off as Lead EBO).

To print a copy, click File—Print.

**Note:** if the agency fiscal note is in Agency Draft status, you will be unable to view and print it; the agency must change the status to Preliminary for others to see their note.

### To Reassign a Fiscal Note to Another EBO

1. To reassign a note to a different EBO, execute a search.
2. Select the note you wish to reassign.
3. On the Status Details for the note, scroll down and click the Modify button.


**Modify**

4. The Status Details screen displays drop down arrows in the EBO and Lead EBO fields. Select a different EBO from the drop down list. Click Save.

Agency EBO: EBO, Education Suggested Agency Assignment:  

Lead EBO: Select ..

**Agency Assignments**

Agency Nbr	Agency Name	Lead	Agency Status	EBO Approve	Agency Signoff Name	Agency Signoff Date	EBO Signoff Name	EBO Signoff Date	
E37	Education Department		Agency Draft						Edit
									Add New

**Message History**

Date	Message	Sender
6/27/2017	bill in Hearing today	AdminUser TESTADM

[Add](#)

Save Cancel

An email will be sent to the newly assigned EBO informing them of the change.

### To Approve or Not Approve a Fiscal Note with Comments

1. Click the Signoff/Remove Signoff button. The Signoff/Remove Signoff screen appears.

**Signoff/Remove Signoff Screen**

Bill Year: 2015	EBO Approval: <input checked="" type="radio"/> Approved <input type="radio"/> Not Approved
Bill Number: HF1882	EBO Narrative: <div style="border: 1px solid gray; height: 30px;"></div>
Bill Version: 0	<a href="#">Copy EBO Narratives:</a>
Agency Number: E37	
Title: Univ. Preschool 4 yr olds funding	

Signoff for:  
☐ Agency  
☐ EBO  
☐ Lead EBO

Sign Off Cancel

2. Click the EBO radio button in the Signoff for section.
3. The Approval radio button is selected by default. In rare cases, an EBO will select Not Approved. When Not Approve is selected an explanation must be entered in the EBO Narrative textbox.
4. Enter any comments in the EBO Narrative text box.

OR

Click Copy EBO Narratives. The Copy dialog box appears.

From: ☒ Agency ☐ Consolidated

Fiscal Year:  

Agency:  

Bill Number:  

Version:  

[Copy](#)

5. Choose the Fiscal Year, Agency, Bill Number, and Version from the drop down lists available.
6. Choose Agency to copy from an individual fiscal note. Choose Consolidated if you are signing off as Lead EBO on a consolidated note and wish to copy your comments as lead on a different note.
7. Click the Copy link.
8. Click the Signoff button to complete EBO signoff.
9. When a note is approved, the EBO comments will appear on page one of the fiscal note document, immediately below the standard approval statement, “I have reviewed this fiscal note for reasonableness of content and consistency with MMB’s Fiscal Note policies”. The standard statement is omitted when Not Approved is selected at signoff.

### **To Approve Fiscal Note without Comments**

1. Click the Signoff/Remove Signoff button. The Signoff/Remove Signoff screen appears.
2. Click the EBO radio button in the Signoff for section.
3. The Approved radio button is selected by default. A standard approval statement will accompany the EBO signature on the fiscal note: “I have reviewed this fiscal note for reasonableness of content and consistency with MMB’s Fiscal Note policies”. In rare cases, an EBO will select Not Approved. When Not Approve is selected at signoff, an explanation must be entered in the EBO Narrative textbox.
4. Click the Signoff button to complete EBO signoff.

## Chapter 6: Search Function

### Search Screen

The Search functionality in the Fiscal Note Tracking System allows users to select and review fiscal notes or groups of fiscal notes based on specified criteria.

To enter search criteria:

1. Select Search from the Home Page menu on the left. The Search screen appears.

The screenshot shows the Search Screen with the following fields and options:

- Bill nbr:
- Version:
- Session:
- Assigned Date: From:  to:
- Urgent:
- Due Date: From:  to:
- Agency:
- Agency Contact:
- Agency Status:
- Note Status:
- Note Type:
- Title:
- EBO:
- Requester:
- Author:
- Committee:
- ☐ EBO Action Required
- ☐ Agency Action Required
- ☐ Show All Assigned Agencies

At the bottom of the form are three buttons: **Search**, **Cancel**, and **Clear Form**.

- Search Screen Checkboxes.** Agency or Agency Signoff role FNTS users' Search screens feature an "Agency Action Required" checkbox. By simply selecting this checkbox and clicking Search, you can retrieve fiscal notes assigned to your agency that are in Draft or Preliminary agency status. EBO users have an "EBO Action Required" checkbox which when checked will retrieve all notes assigned to the EBO that are waiting for EBO or Lead EBO signoff. All user roles have the "Show All Assigned Agencies" checkbox. Search results for consolidated fiscal notes will list all agencies assigned to the note, not just the lead agency, when this checkbox is selected (see Consolidated Notes, below). Enter the criteria on which you want to base your search. See the Search Options table in [Appendix B](#) for descriptions of search fields.
- Search Results Screen.** When you have entered your search criteria, click the Search button to execute the search. The Search Results screen appears.

Fiscal Notes Tracking System											
HOME > Search > Search Results											
Session: 2019-2020											
Logged As: Human Services EBO											
Bill Info	Bill Nbr	Revised	Note Title	Agency Nbr	Agency Name	Note Status	Agency Status	Consolidated	Note Type	Due Date	Comp Bill
<a href="#">Text Status</a>	HF58-0		<a href="#">Agency Dec 4 AM Training Exercise 1 and 2</a>	R32	Pollution Control Agency	In Process	Agency Draft	Y	Regular Fiscal Note	11/26/2018	<a href="#">SF515</a>
<a href="#">Status</a>	HF58-1A		<a href="#">Agency Dec 4 AM Training Exercise 3</a>	R32	Pollution Control Agency	In Process	Agency Draft	Y	Regular Fiscal Note	11/21/2018	
<a href="#">Text Status</a>	HF81-0		<a href="#">Agency Dec 6 PM Training Exercise 1 and 2</a>	B13	Commerce Dept	In Process	Agency Draft	Y	Regular Fiscal Note	12/31/2018	<a href="#">SF508</a>
<a href="#">Text Status</a>	HF235-0	Y	<a href="#">Renewable Dev Acct. Solar Incent Terminate</a>	B13	Commerce Dept	In Process	Agency Draft		Regular Fiscal Note	1/9/2019	

- c. **Consolidated Notes.** By default, Search results will display only one line for consolidated fiscal notes, listing the Lead assigned agency and its agency status. If a user would like to be able to see all agencies assigned to a consolidated note or notes, click on the “Show All Assigned Agencies” checkbox. This generates a list of all agencies assigned to the note and their statuses.
2. The records on this screen may be sorted by clicking on the column headings. For example, clicking on Due Date will sort the fiscal notes with the earliest due date on top. Other sort options are bill number or title.
  3. To view the bill language, click on the link for the Bill Text in the Bill Info Column. This will take you to the bill text on the legislative Office of the Revisor of Statutes’ website.
    - You will not be able to click on the Bill Text link to view language for classified or unofficial fiscal notes. Click on the fiscal note and View attached files, to access the language that is attached by the legislative requester for these notes.
  4. To return to the Search screen for a new search or to return to the Home page, use the “breadcrumbs” at the top of the page or the navigation panel to the left of the screen.

## Fiscal Note Search and Tracking Functions

Besides providing for requesting, preparing, and distributing fiscal notes, FNTS has tracking and reporting capabilities. The FNTS Search screen that is accessed through the Main Menu is to be used to select those fiscal notes of interest to a user (e.g., for the purpose of checking the status of a fiscal note or to review fiscal notes by author, title, agency, etc.). A fiscal note may be selected from the Fiscal Note Search screen and viewed, saved or printed as a pdf document.

FNTS includes a tracking capability that allows users to determine the current processing status of the fiscal note as a whole or of each assigned agency’s fiscal note. The Note Status indicates the status of the fiscal note as a whole and is shown on both the Search and Status Details screens. The Agency Status indicated the status of an individual agency’s fiscal note. The table below lists the Note Statuses in the Fiscal Note Tracking System:

NOTE STATUS	STATUS DESCRIPTION
Legislative Request	Fiscal note has been requested by the legislature; agencies have not been assigned.
In Process	Fiscal note has been assigned to agency (or agencies) for preparation.
Waiting for EBO Signoff	All agencies have signed off and are waiting for one or more EBOs to sign off.
Waiting for Lead EBO Signoff	This is only applicable to a consolidated fiscal note. All assigned agencies have signed off and the note is waiting for lead EBO to review and sign off on the consolidated note.
Inactive	Fiscal note was initially requested by the legislature, but is currently not needed and has been marked inactive. Does not currently require a review or sign off.
Complete	Fiscal note has been signed off by all agencies and EBOs and transmitted to the legislature. The Complete Date field is automatically populated upon final signoff of the fiscal note.

The Agency status indicates the status of the individual agency's fiscal note. The agency status is also displayed on both the Search and Status screens. After an agency (or agencies) have been assigned, each agency's fiscal note will display one of the Agency Statuses described in the table below:

AGENCY STATUS	AGENCY STATUS DESCRIPTION
Agency Draft	FN assigned to an agency for preparation. Agency can enter data but other FNTS users may not view its fiscal note while in Agency Draft Status.
Preliminary Data	Data has been entered by agency, but has not yet been signed off as complete. Other Users in FNTS are able to view the prepared note.
Agency Signed Off	FN signed off by agency and returned to Minnesota Management and Budget for executive budget officer review and signoff.
EBO Signed Off	Agency and executive budget officer have reviewed and signed off.
MMB Signed off for Agency	Minnesota Management and Budget signed off for an agency because agency did not respond to request by specified due date.

## Chapter 7: Reporting

### Fiscal Note System Reports

There are three tracking reports available for users who do not want to individually review fiscal note statuses using the search function. These reports are available from the Fiscal Note Tracking System main menu under the Fiscal Note Reports option as follows:

1. Legislative Fiscal Note Requests
2. Fiscal Note Requests by Agency
3. Fiscal Note Requests by EBO

### To run a report in FNTS

1. Click on the Reports item in the left hand navigation pane. The reports screen will appear.
2. Select the report you wish to run by clicking the radio button next to it. The Parameters Selection box appears.

3. You may run the report as is or filter using the available parameters. When you click on a button, a box with the available parameter selection appears. Click in the checkbox to select the parameter.
  - a. In the Parameters panel, select the current fiscal note biennium (default). If you wish to run a report from a single session, select Year 1 or Year 2.
  - b. Select any of the other parameters in the panel.
4. You may choose the report output by clicking either the Create PDF Report button or the Export Report Data to Excel button.



- a. If you wish to just view the report, select Create PDF.
- b. If you wish to sort the data or use any other Excel functionality, click Export to Excel. You will be prompted to Open or Save your Excel report.

Reports

**Select a report**

- ☐ Legislative Fiscal Note Requests
- ☒ Fiscal Note Requests by Agency
- ☐ Fiscal Note Requests by EBO
- ☐ Count Fiscal Note Requests by Status
- ☐ Count Fiscal Note Requests by EBO
- ☐ Classified Fiscal Note Requests by Agency

**Select parameters for this report**

☒ 2019-20 Note Session

☐ Select Note Session

☐ Both years

☐ Year 1

☒ Year 2

☒ All Agencies

☐ Select Agency

☒ Both Chambers

☐ Select Chamber

☒ All Agency Statuses

☐ Select Agency Status

☒ All Note Statuses

☐ Select Note Status

☒ All Request Due Dates

☐ Select Request Due Dates

Create PDF Report

Export Report Data to Excel

[Clear Report Parameters](#)

5. The report will run once you click one of the buttons.
6. The Parameters you selected will remain in case you want to run the report again with the other format. They will stay until you clear them or close the form. To clear them, click on "Clear Report Parameters" at the bottom of the screen.

## APPENDIX A – System-Generated Emails

Notice	Frequency	Recipients*
Fiscal Note Requested	Immediately	MMB Admin; Bill Author
Required Attachment Missing	Hourly	Legislative Requester
Fiscal Note Retrieved	Immediately	MMB Admin
New Fiscal Note Assigned	Immediately	Agency Coordinator; Agency Email Notification List, Assigned EBO
New Companion Note Assigned	Immediately	Agency Coordinator; Agency Email Notification List
EBO Pre-Signoff Review	Immediately	Assigned EBO
Note Ready for EBO signoff	Immediately	Assigned EBO
Note Ready for EBO signoff	Immediately	Lead EBO
Agency Removed signoff	Immediately	Assigned EBO
MMB Removed Agency signoff	Immediately	MMB Admin; Agency Coordinator
Agency removed from Fiscal Note	Immediately	Agency Coordinator; Agency Email Notification List
Fiscal note Inactivated	Immediately	Legislative Requester; MMB Admin; Agency Coordinator; Agency Email Notification List
Fiscal Note Reactivated	Immediately	Legislative Requester; MMB Admin; Agency Coordinator; Agency Email Notification List
EBO signoff removed, Consolidated Fiscal Note in Process	Immediately	MMB Admin; Agency Coordinator; Agency Email Notification List
Fiscal Note Complete	Immediately	Legislative Requester; MMB Admin; Agency Coordinator; Agency Email Notification List; Committee Notification List, Requesting Committee Chair, Bill Author; Companion Author (if fiscal note exists for companion bill); Assigned EBO
Fiscal Note Revised after Completion	Immediately	Legislative Requester; MMB Admin; Assigned EBO; Agency Coordinator; Agency Email Notification List; Committee Notification List, Bill Author; Companion Author

## Appendix A – System Generated Emails

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Notice	Frequency	Recipients*
Fiscal Note Due Date Change	Immediately	Legislative Requester; MMB Admin, Assigned EBO; Agency Coordinator; Agency Email Notification List
Past Due Fiscal Notes	Once Daily After 5 pm	Agency Coordinator; Agency Email Notification List
Message Field Updated	Immediately	Legislative Requester; MMB Admin, Assigned EBO; Agency Coordinator; Agency Email Notification List

\*Email notifications for Classified Unofficial fiscal notes are nonpublic data and are only sent to the legislative requester, the assigned agency's coordinator, and the assigned EBO.

## APPENDIX B – Search Screen Fields

Search Options	Description
Bill Nbr	Allows user to search by a specified bill number or by companion bill number. The bill number begins with HF for House or SF for Senate, followed by the bill number. For example, HF20 will bring back HF0020.
Version	Allows user to search by a specified bill version. The bill version is comprised of one of the following characters: 0 (zero) for original, E for engrossment, A for amendment, and UE for unofficial engrossment, and CE for committee engrossment. If “E”, “A”, “UE”, or “CE” is indicated, a number precedes the character. For example, 1E is the 1st engrossment.
Session	Allows the user to search either present or past year’s fiscal notes. The current two-year session is the default. You can search for past fiscal notes in FNTS beginning with the 2015-2016 session. To search for fiscal notes that pre-date the new system, use the Fiscal Note Search function on MMB’s website: <a href="#">Fiscal Note Search</a>
Assigned Date	Allows the user to search by the date the fiscal note was assigned to an agency. Two Date Assigned fields are provided to allow you to search for a range of dates. If you double click in the field, a calendar will appear.
Urgent	Limits the notes to urgent requests. A request is marked urgent when the Due Date is four or fewer calendar days from the Request Date.
Due Date	Allows the user to search by the date the completed fiscal note is due to the legislature. Two Due Date fields are provided to allow you to search for fiscal notes within a range of dates. If you double click in the field, the due date calendar dialog box will appear. To eliminate notes from appearing from the previous Legislative session, a user will want to enter Nov 1 with a year to bring up all the notes for a session period. The system starts each session year on Nov 1 through Oct 31 of the next year. Users may modify the due date criteria selection to search for fiscal notes from the first year, if desired.
EBO Action Required	This checkbox is only displayed for EBO users. Selection filters our Draft, Preliminary, Inactive, and Completed fiscal notes to allow you to view notes that are ready for signoff by the EBO or Lead EBO (waiting for EBO or Waiting for Lead EBO note status).
Agency	Allows the user to search by a specified agency. You may click the drop down and select your agency, or enter the first letter to filter the list.
Agency Action Required Checkbox	This checkbox is only displayed for Agency or Agency Signoff users. Selection filters out notes the agency has not signed off on, as well as inactive and completed fiscal notes, to allow you to view notes that are not signed off by the agency (Draft or Preliminary note status).

Search Options	Description
Agency Contact	Use this search feature to find fiscal notes that list a particular contact. The system will retrieve all results that contain the search string entered.
Show All Assigned Agencies Checkbox	This checkbox is available for all user roles. Selection overrides the default search results format for consolidated fiscal notes and generates a list of all agencies assigned to the note instead of only the Lead agency. This allows users to view the agency status of all assigned agencies from the search results, without having to go to the status details.
Agency Status	Allows the user to search for fiscal notes in one of the various agency statuses: Agency Draft, Preliminary Data, Agency Signed Off, EBO Signed Off; MMB Signed Off for Agency.  <i>Note: Fiscal notes that are in Agency Draft status are viewable by the agency that is drafting them. Other FNTS users may not see the fiscal note data until the agency preparing the note updates its agency status to Preliminary Data.</i>
Note Status	Allows the user to search fiscal notes in one of the various fiscal note statuses. The fiscal note status consists of: Legislative Request, In Process, Waiting for EBO Sign Off, Waiting for Lead EBO Sign Off, Complete, and Inactive.
Note Type	Narrows the search results to specific types of notes. Types available are: Classified Unofficial, Regular, and Unofficial.  <i>Note: Classified unofficial notes can only be searched and retrieved by the assigned agency's user(s) with sign off authority, MMB Budget Planning and Operations, and EBOs.</i>
Title	Allows the user to search for fiscal notes with a specific title. If only a portion of the title is known, enter the partial title. The system will return all fiscal notes that contain that partial title. Wildcards are not necessary.
EBO	Allows the user to search for fiscal notes assigned to a specific Executive Budget Officer. A list of available options appears when you click on the drop down arrow.
Requester	Allows the user to search for fiscal notes requested by a specific legislative fiscal analyst FNTS user. A list of available options appears when you click on the drop down arrow.
Author	Allows the user to search for fiscal notes that have been requested for bills by a specific chief author. A list of available options appears when you click on the drop down arrow.
Committee	Allows the user to search for fiscal notes requested by a specific legislative committee. A list of available options appears when you click on the drop down arrow.