Constitutional Officer Information Network

C•IN

Budget Request Guide

Circuit Court Clerks

Compensation Board
December 1, 2008

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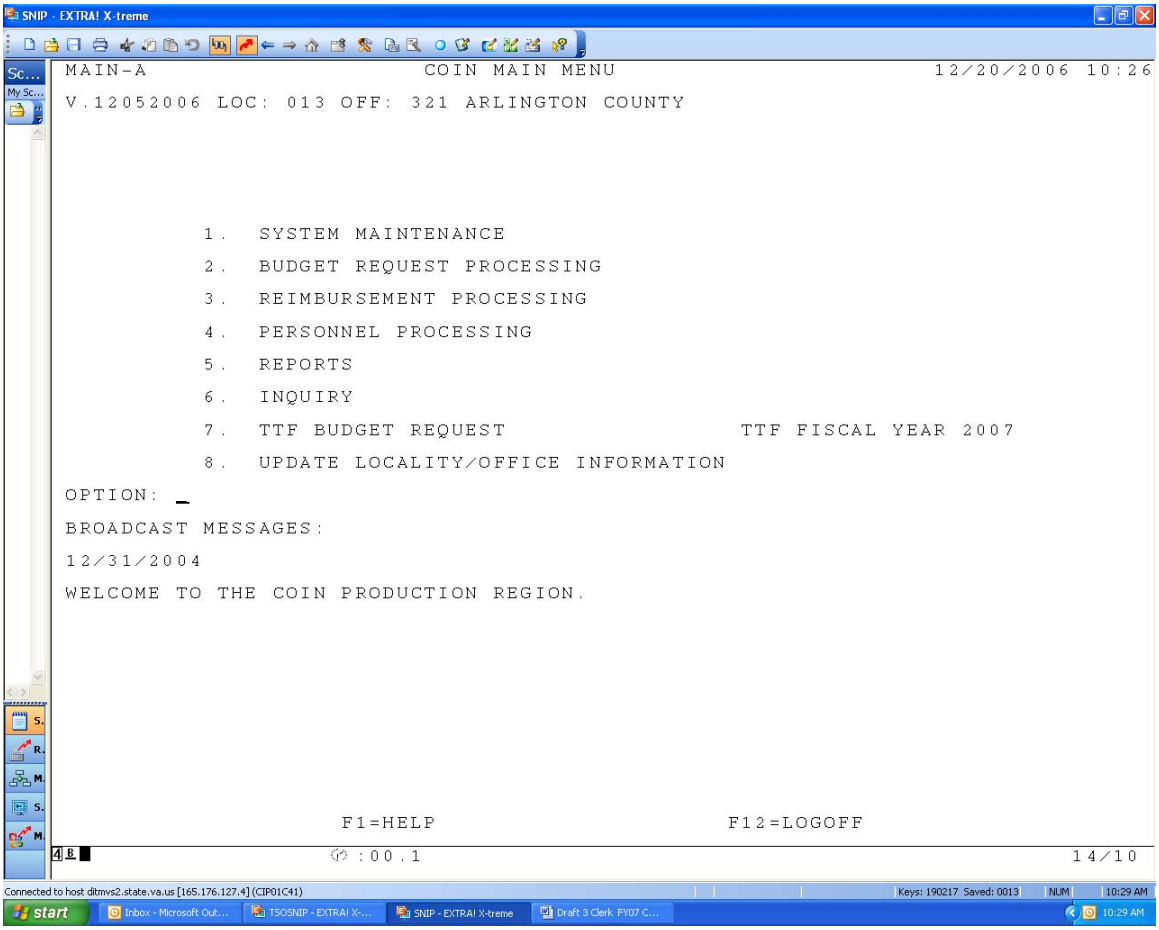
1. COIN MAIN MENU



- **Select Option #2 "Budget Request Processing"**

2. Main Menu - Option #2, Budget Request (OLB) Menu

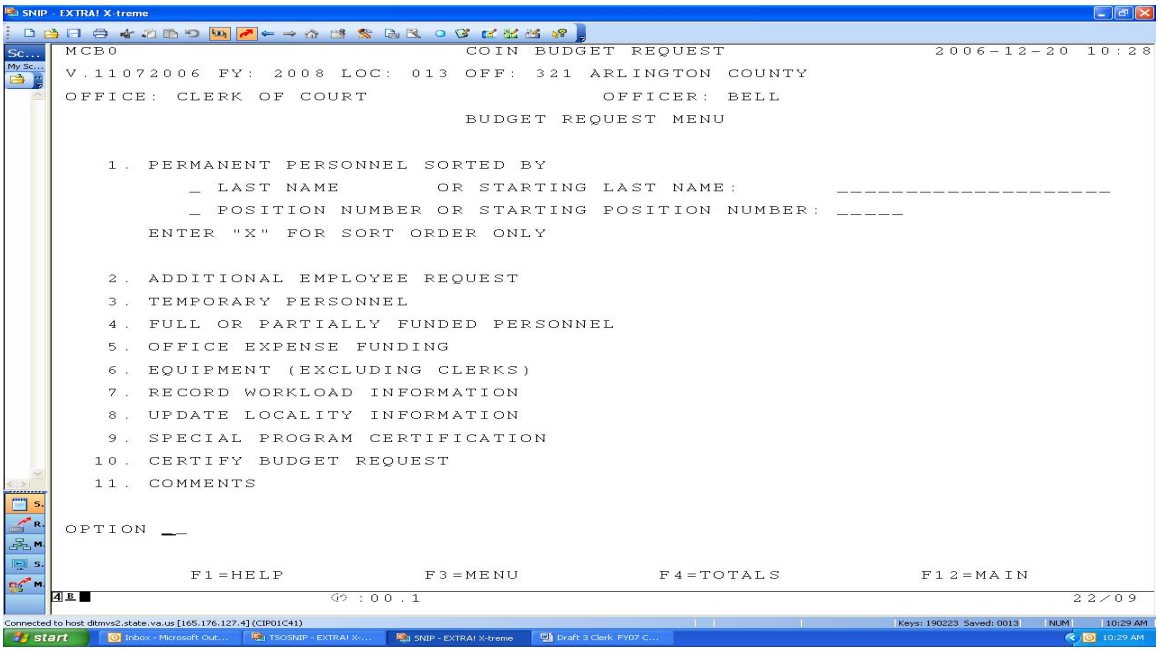
Purpose:

The Budget Request menu is accessed from the COIN main menu. All Budget Request functionality will be accessed through this menu. A user may choose to view the Permanent Personnel data sorted by Last Name, or Position Number. The user may also select a starting value whereby the Permanent Personnel screen will display the record requested or the next record in the sort sequence if the requested record was not found.

Navigational Path

- Coin Main Menu – Select Option #2, COIN Budget Request

CLERK"S



```
MCB0                                COIN BUDGET REQUEST                    2006-12-20  10:28
V.11072006 FY: 2008 LOC: 013 OFF: 321 ARLINGTON COUNTY
OFFICE: CLERK OF COURT                      OFFICER: BELL
                                    BUDGET REQUEST MENU

   1. PERMANENT PERSONNEL SORTED BY
         _ LAST NAME        OR STARTING LAST NAME:        ____________________
         _ POSITION NUMBER OR STARTING POSITION NUMBER: _____
      ENTER "X" FOR SORT ORDER ONLY

   2. ADDITIONAL EMPLOYEE REQUEST
   3. TEMPORARY PERSONNEL
   4. FULL OR PARTIALLY FUNDED PERSONNEL
   5. OFFICE EXPENSE FUNDING
   6. EQUIPMENT (EXCLUDING CLERKS)
   7. RECORD WORKLOAD INFORMATION
   8. UPDATE LOCALITY INFORMATION
   9. SPECIAL PROGRAM CERTIFICATION
  10. CERTIFY BUDGET REQUEST
  11. COMMENTS

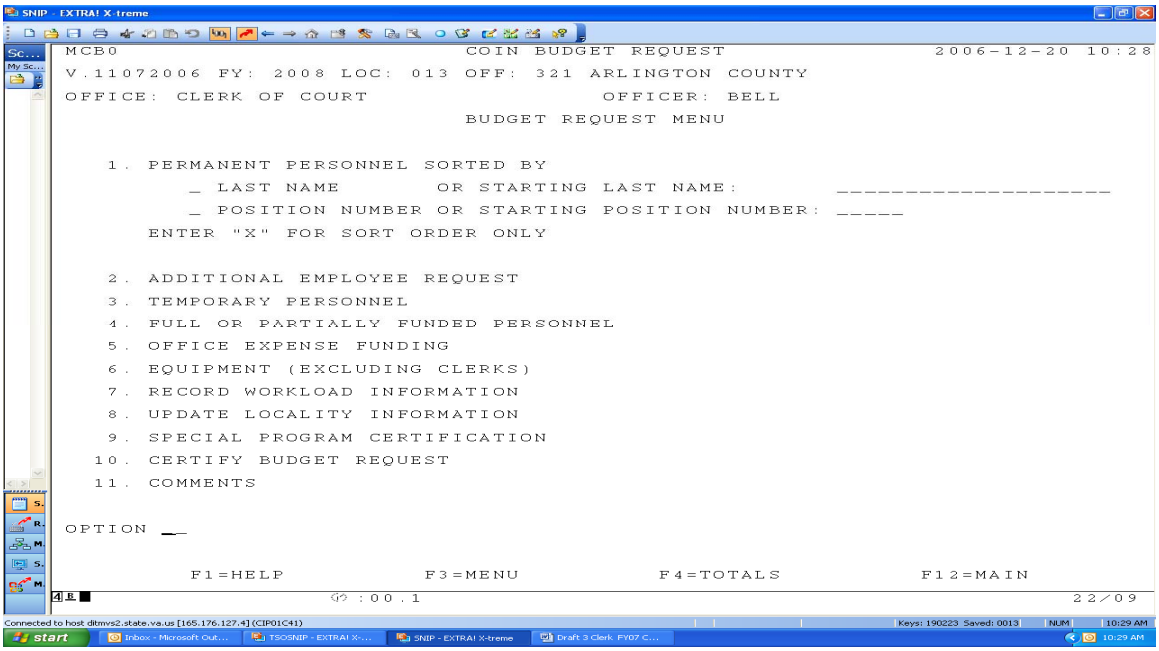
OPTION __

         F1=HELP          F3=MENU          F4=TOTALS          F12=MAIN
                                                                          22/09
```

Helpful Hints:

- COIN Budget Request Menu provides access to other related screens
- Locality and office code will be displayed by COIN when you log into the COIN system
- 'FY' - The upcoming fiscal year will be pre-filled on your COIN Budget Request Menu
  - ✓ If you wish to view a prior fiscal years Budget Request, type over the supplied fiscal year
- If the required fields have not been completed, the system will not allow you to certify your Budget Request

Budget Request Menu



```
MCB0                                COIN BUDGET REQUEST                    2006-12-20  10:28
V.11072006  FY:  2008  LOC:  013  OFF:  321  ARLINGTON COUNTY
OFFICE:  CLERK OF COURT                     OFFICER:  BELL
                                    BUDGET REQUEST MENU

   1.  PERMANENT PERSONNEL SORTED BY
          _ LAST NAME        OR STARTING LAST NAME:        ____________________
          _ POSITION NUMBER OR STARTING POSITION NUMBER:  _____
       ENTER "X" FOR SORT ORDER ONLY

   2.  ADDITIONAL EMPLOYEE REQUEST
   3.  TEMPORARY PERSONNEL
   4.  FULL OR PARTIALLY FUNDED PERSONNEL
   5.  OFFICE EXPENSE FUNDING
   6.  EQUIPMENT (EXCLUDING CLERKS)
   7.  RECORD WORKLOAD INFORMATION
   8.  UPDATE LOCALITY INFORMATION
   9.  SPECIAL PROGRAM CERTIFICATION
  10.  CERTIFY BUDGET REQUEST
  11.  COMMENTS

OPTION __

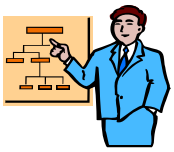
          F1=HELP            F3=MENU            F4=TOTALS            F12=MAIN
```

Helpful Hints (Continued):

- The 'Last Name' sort is the default sort option if no sort option is selected or no partial entry is found
  - ✓ The user may enter an 'X' in the 'Last Name' sort field to start at the 1st name listed alphabetically for your office, or
  - ✓ Tab to the 'Starting Last Name' field and input the Last Name of the employee you choose to start the sort
  - ✓ If a starting point or partial initial selection is selected but not found, the Permanent Personnel screen will be displayed starting at the next closest record
  - ✓ Only one sort order option or full/partial starting key may be chosen
- Screen selections #2 through #11 are accessed by entering the choice into the "Option" field in the lower left hand corner of the screen
  - ✓ Invalid option will result in an error message.

Procedures:

- Select an 'Option' __
  - ✓ If Option #1, Permanent Personnel, input 'X' next to the sort order you want to view
- 'F' Function Hot Keys allow back and forth movement between commonly used screens
- Press 'F3' or 'F12' to exit the screen to the COIN Main Menu



3. Option #1, Permanent Personnel

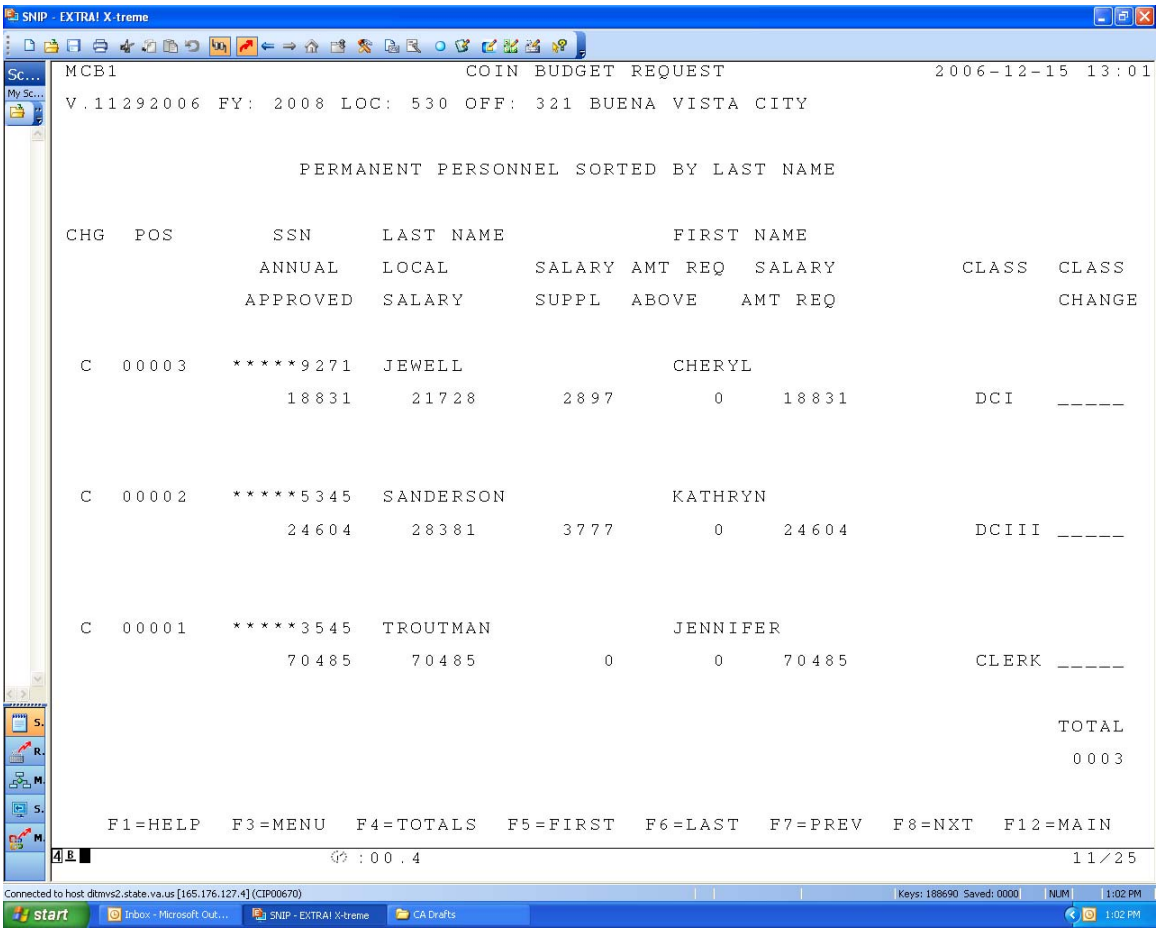
Purpose:

The Permanent Personnel Request Screen is accessed from the COIN Budget Request menu. This screen allows the user to review and update the Permanent Personnel for the Budget Request. The user may update the Local Salary, Salary Amount Requested and Class Change. The Compensation Board (CB) may update Annual Salary, Salary Amount Requested and the Class fields. Totals for various fields may be accessed from this screen.

Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #1, Permanent Personnel

CLERK"S



```
MCB1                          COIN BUDGET REQUEST                2006-12-15 13:01
V.11292006 FY: 2008 LOC: 530 OFF: 321 BUENA VISTA CITY

                 PERMANENT PERSONNEL SORTED BY LAST NAME

CHG  POS        SSN      LAST NAME            FIRST NAME
              ANNUAL     LOCAL       SALARY AMT REQ  SALARY          CLASS  CLASS
            APPROVED     SALARY      SUPPL  ABOVE    AMT REQ                CHANGE

 C  00003    *****9271  JEWELL                CHERYL
                18831     21728       2897       0     18831          DCI   _____

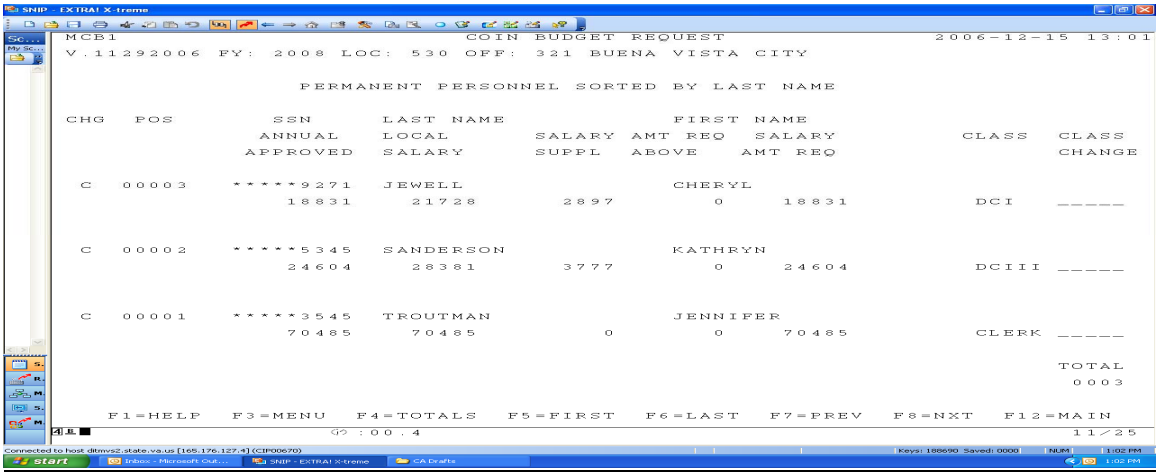
 C  00002    *****5345  SANDERSON             KATHRYN
                24604     28381       3777       0     24604          DCIII _____

 C  00001    *****3545  TROUTMAN              JENNIFER
                70485     70485          0       0     70485          CLERK _____

                                                                      TOTAL
                                                                       0003

   F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NXT   F12=MAIN
4 E                        :00.4                                          11/25
```

Option #1, Permanent Personnel



```
MCB1                          COIN BUDGET REQUEST                          2006-12-15  13:01
V.11292006  FY:  2008  LOC:  530  OFF:  321  BUENA VISTA CITY

                      PERMANENT PERSONNEL SORTED BY LAST NAME

CHG   POS          SSN        LAST NAME                FIRST NAME
                 ANNUAL       LOCAL        SALARY  AMT REQ   SALARY          CLASS   CLASS
               APPROVED       SALARY       SUPPL   ABOVE    AMT REQ                  CHANGE

 C   00003     *****9271     JEWELL                   CHERYL
                   18831       21728        2897        0      18831          DCI    _____

 C   00002     *****5345     SANDERSON                KATHRYN
                   24604       28381        3777        0      24604          DCIII  _____

 C   00001     *****3545     TROUTMAN                 JENNIFER
                   70485       70485           0        0      70485          CLERK  _____

                                                                                      TOTAL
                                                                                       0003

  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NXT   F12=MAIN
A JL                      02 :00 .4                                              11/25
```

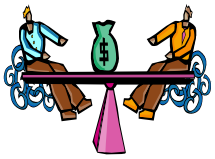
Helpful Hints:

- Option #1, Permanent Personnel screens display salaries for all CB funded employees
- This screen displays each position record for your office
  - ✓ If needed, multiple screens will be displayed to view all position records for your office
- If salary adjustments are made to the 'Salary Amount Requested', COIN will calculate the difference from the annual salary approved and place the difference in the amount requested above field
- Personnel changes (CB10s) processed during the time period that the online budget system is available to your office will automatically update personnel and salary data in COIN
  - ✓ The processing of a CB10 could eliminate any salary increase and/or change requests previously entered on this screen for the affected position if the officer has not yet signed off on the completed budget request
- The following codes may be listed in the 'CHG' data field
  - ✓ Blank Space = No CB10 action taken
  - ✓ 'C' = CB10 Change
- If the type of request entered for the affected position prior to the personnel change is still desired after the personnel change, the request must be re-entered in the Permanent Personnel Screens of Budget Request prior to sign off by the officer

PROCEDURES:

Annual Approved:	Supplied by CB (Can be changed by CB)
Local Salary:	Enter the total salary for each position including locality supplement if applicable. If no local supplement funded press the "Enter" key and the CB Annual Approved Salary will be used.
Salary Suppl:	Calculated for you = Total Locality amount minus the Compensation Board Approved Salary gives you the salary Supplement
Amt Req Above:	Calculated for you = Salary Amount Requested – Annual Salary gives you amount requested above
Sal Amt Req:	Entered by Officer or Compensation Board
Class:	Supplied by system
Class Change:	Enter the class you are requesting for a salary alignment for the employee currently in this position. **(Do Not Enter A CB10 For This Request)**

- After all the requested data has been entered, press the "Enter" key to update
- Press 'F8' to proceed to the next page if needed
- Press 'F3' to exit the screen to the Budget Request Manual
- Press 'F4' to display "totals" for your office



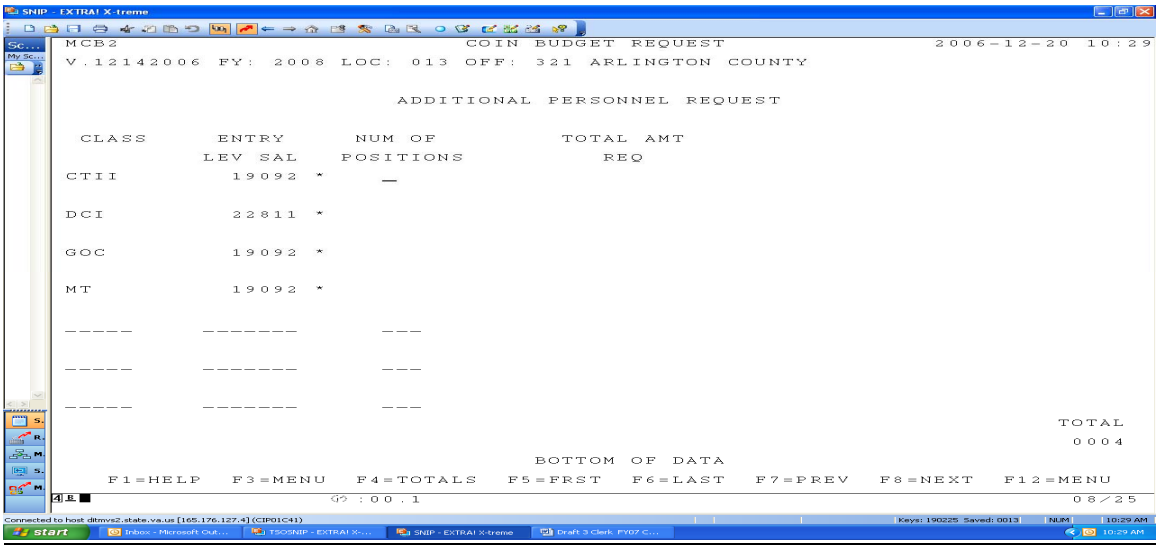
4. Option #2, Additional Personnel Request

Purpose:

The Additional Personnel Request Screen is accessed from the COIN Budget Request menu. This screen will allow the User to Request Additional Personnel. The User may request additional personnel by Class type.

Navigational Path:

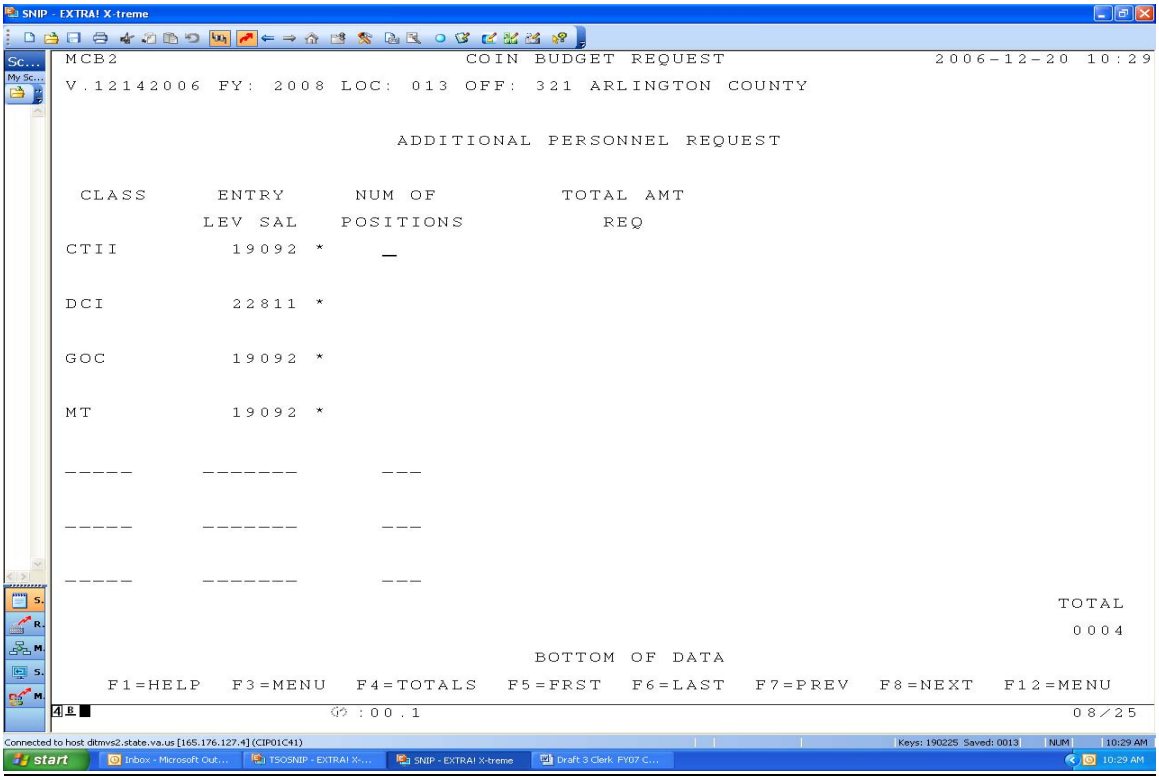
- Coin Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #2, Additional Personnel Request



Helpful Hints:

- Complete this section to request additional full-time CB funded positions of a predefined class, or
- Complete this section to request additional full-time CB funded positions other than a predefined class
- Blank data fields (Class, Entry Level Salary and Number of positions) are provided to enter a request for Additional Personnel other than pre-listed CB classes and/or salaries
- COIN calculates the total amount for each class based on the number of positions requested
- 'Number of Positions' fields **are required,** you <u>must</u> enter a '0' or the number of additional full-time CB funded positions requested
- Any new positions approved by the General Assembly or any reallocated positions will be allocated by the Compensation Board in FY09, as they were in FY08, based upon the request and in accordance with the Compensation Board's staffing standards
- Valid CB Class must be entered; salary request must be between minimum and maximum of pay band of class requested

Option #2 Additional Personnel Request



Procedures:

Class:	Supplied by CB. If the supplied class is not the class you wish to add, tab to the blank field under the class column and input the class code you wish to request. Valid CB Class must be entered, if unknown, see the salary scales in the appendix
Entry Level	Supplied by CB. If the supplied salary is not the salary you wish to request, tab to the blank field under the 'Entry Level' column and enter the salary you wish to request
Number of Positions:	Enter the number of positions you are requesting
Blank Fields (Other)	Enter Class, Salary and number of positions requested

- Press the "Enter" key after completing the information requested
- Press "F8" to proceed to the next screen
- Press **'F3=Exit'** to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

5. Option #3, Temporary Personnel Fund Request

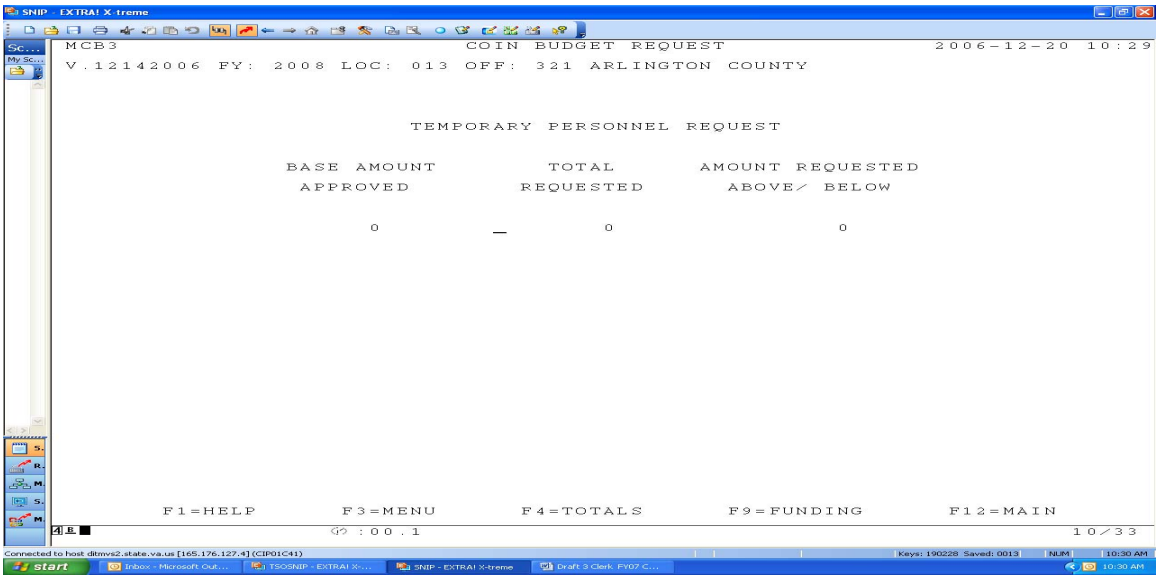
Purpose:

The Temporary Personnel Request Screen is accessed from the COIN Budget Request menu. The Temporary Personnel Request Screen allows the user to review or update the total dollar amount requested for the Temporary Personnel funding in the Budget request.

Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #3, Temporary Personnel Request

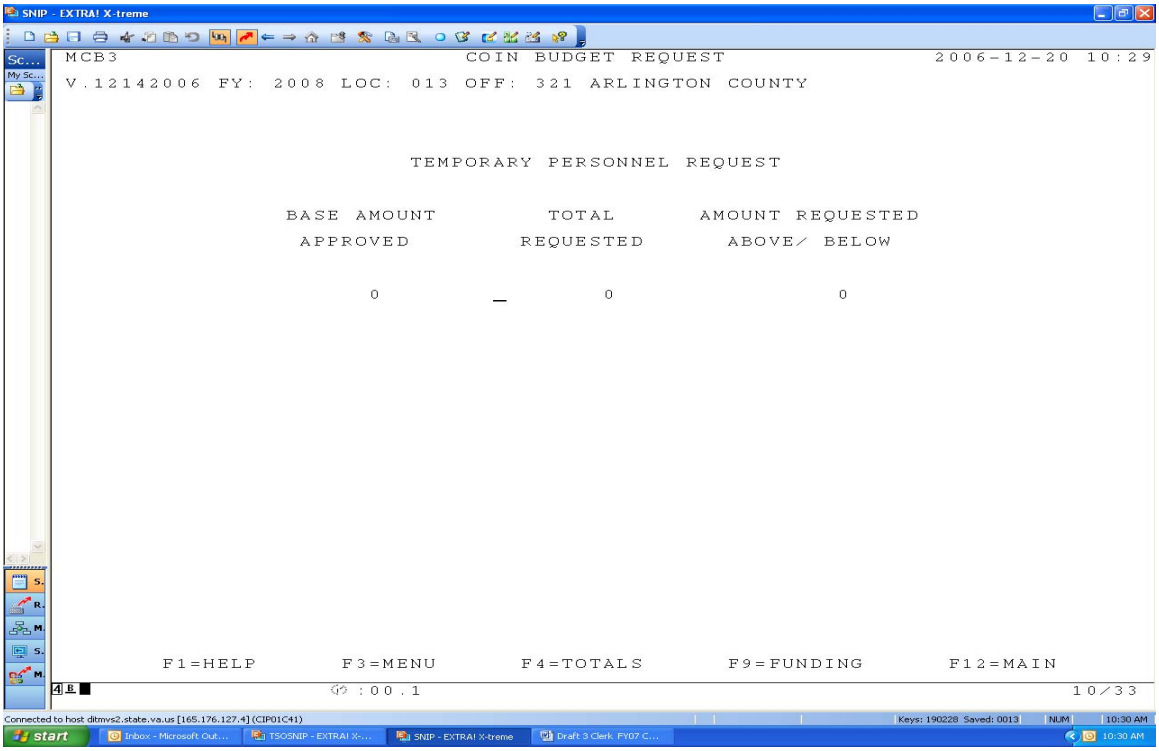
CLERK"S



Helpful Hints:

- The budgeted amount for the prior fiscal year for Temporary Employee funding is displayed in 'Base Amount Approved' column
- The 'Total Requested' data field should reflect your total request needed for Temporary Personnel funding
  - ✓ If no additional funds are needed above the 'Base Amount Approved', enter the 'Base Amount Approved' as your total request for Temporary Personnel
  - ✓ If additional or reduced funding is reflected in the 'Total Request' data field, the 'Amount Requested Above/Below' will be recalculated
- Check the Base Amt Approved to your Original July 1 Approved Budget to make sure that fund transfers approved during the current year are not included in this figure, unless the Compensation Board approved minutes state that this is a Base Budget Adjustment

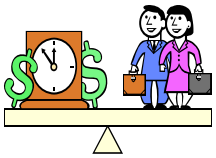
Option #3, Temporary Personnel Fund Request



Procedures:

Base Amt Approved:	Supplied by COIN
Total Req:	Enter your 'Total Request' for temporary funding
Amt Req Above/Below:	This field will be calculated for you

- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office



6. Option #4, Fully Or Partially Funded Personnel

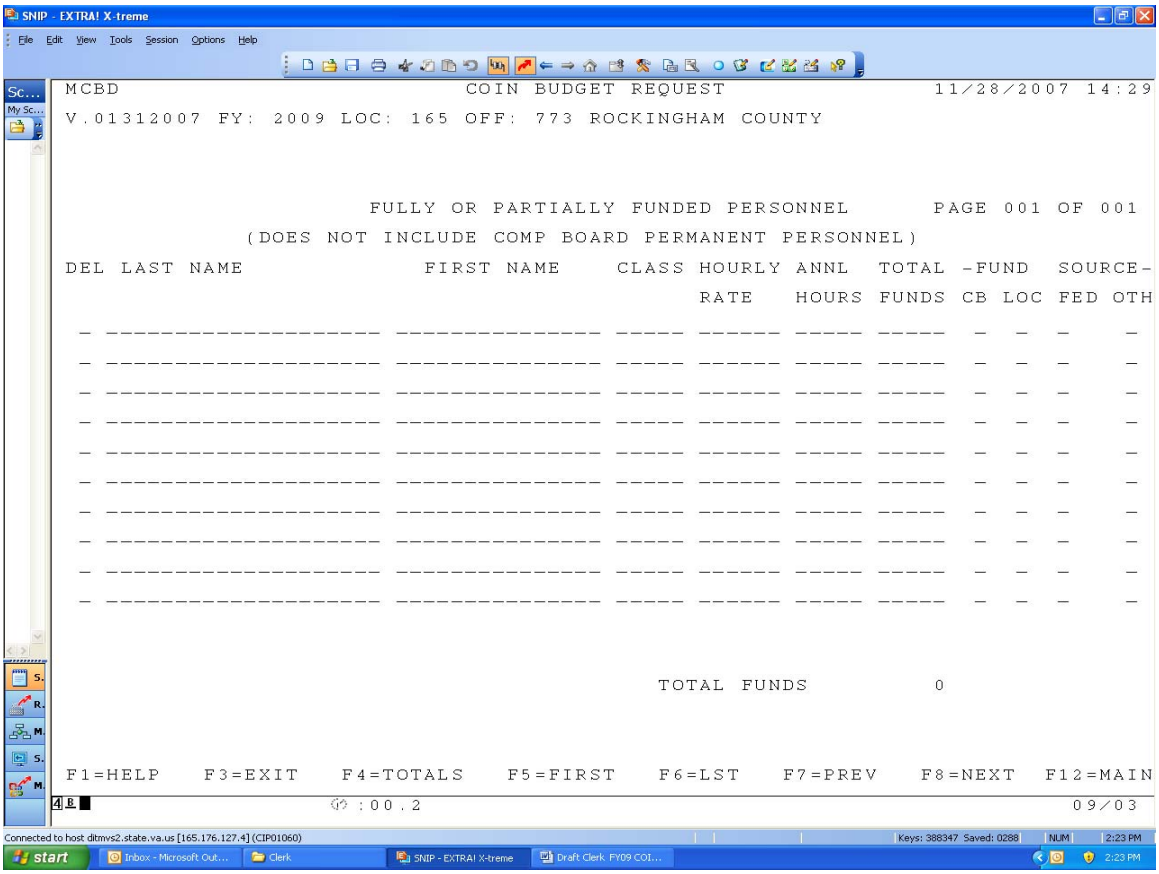
Purpose:

The Fully or Partially Funded Personnel screen is accessed from the Budget Request menu or Temporary Personnel Screen. Total Funds, Hourly Rate, class, first name, last name, Fund Source, and Annual Hours are displayed for a locality.

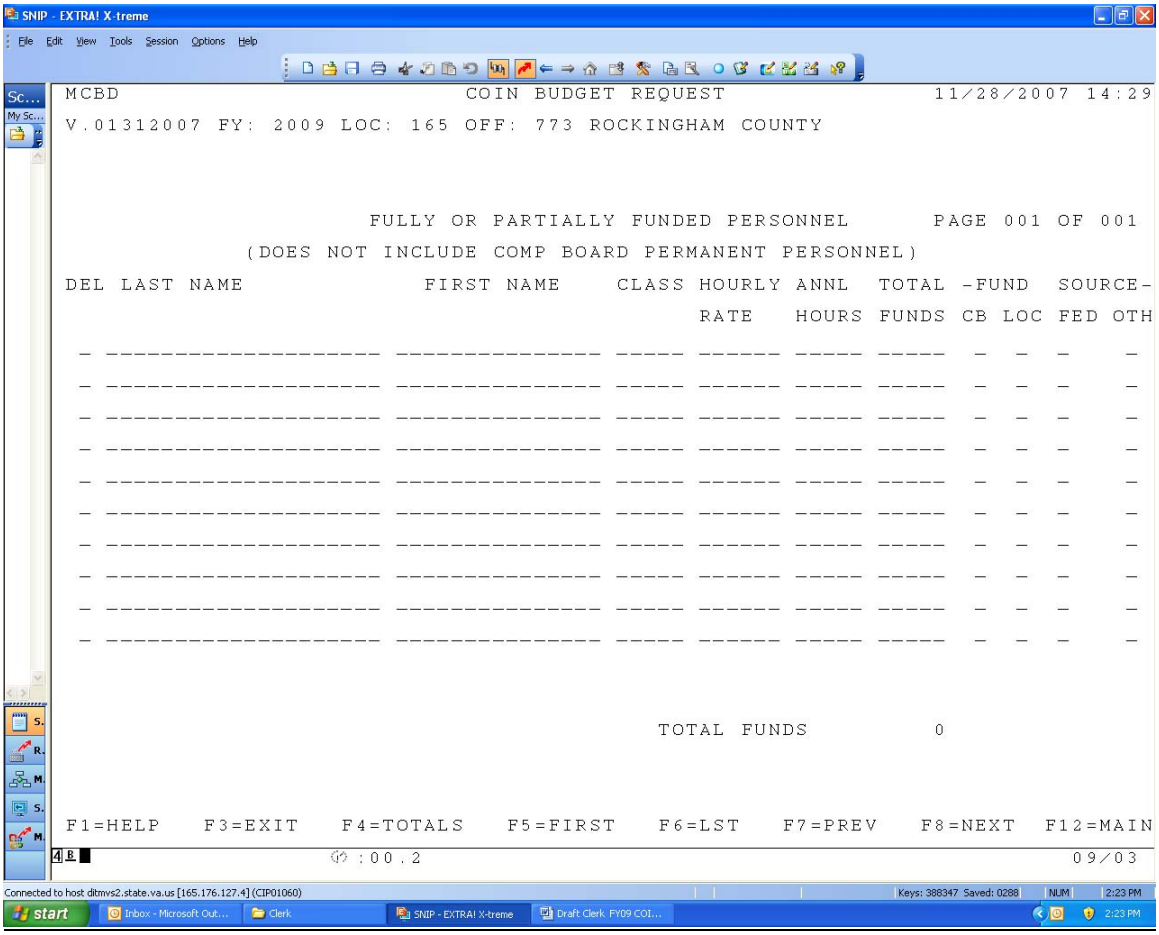
Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #4, Fully or Partially Funded Positions

CLERK"S



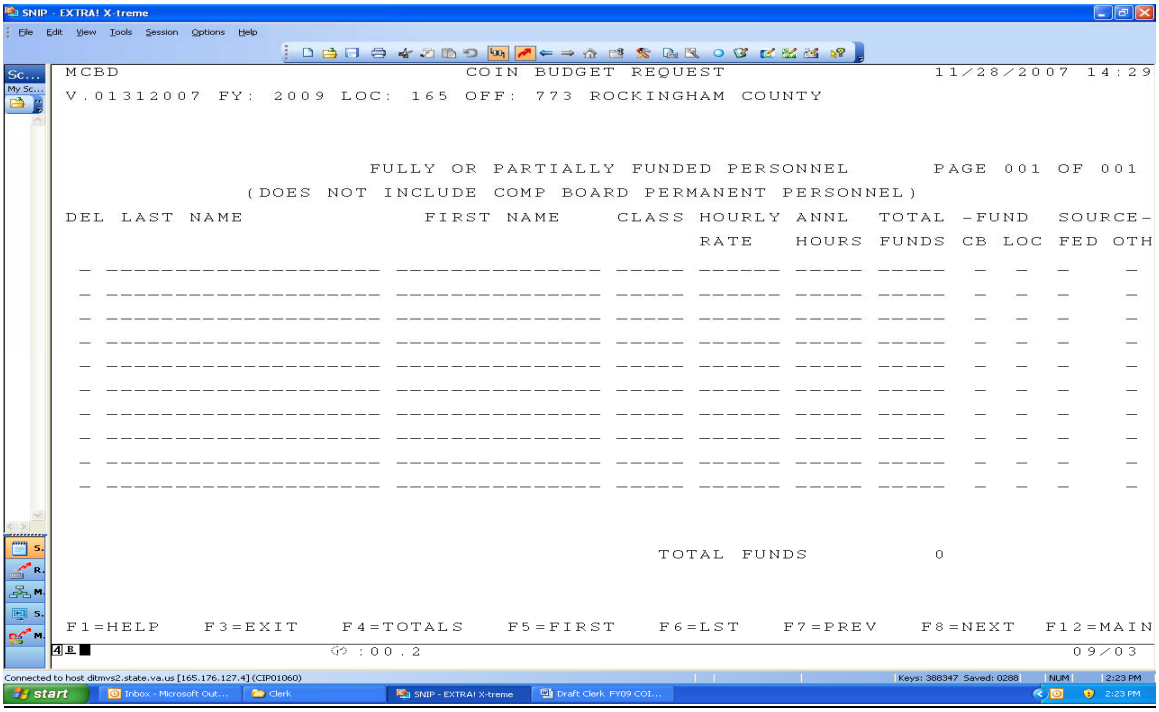
Option #4, Fully Or Partially Funded Positions



Helpful Hints:

- This screen should be used to enter salary information for positions fully or partially funded by the Compensation Board, the Locality or other sources
- This **does not** include positions identified as current permanent employees under Option #1, which may be supplemented by another source
- Upon entry of the required fields, the system will calculate the fund amount for each person and the total funds for your office
- For each temporary employee for whom reimbursement will be requested from CB approved temporary personnel funding, last name, first name, class, hourly rate, planned number of hours to be reimbursed for the fiscal year and the source(s) of funding for the personnel must be provided
  - ✓ If employee is unknown, key 'Vacant' in the 'Last Name' data field
  - ✓ Annual hours cannot exceed 2,080 per individual
  - ✓ Enter "X" in at least one fund source field
  - ✓ 'X' may be entered in as many of the Fund Source fields as are applicable for that record

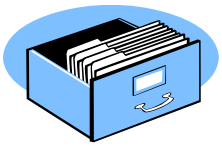
Option #4, Fully Or Partially Funded Positions



Procedures:

Del:	Enter 'D' to delete entry
Last Name:	Enter the employee's last name; if Vacant, type "Vacant"
First Name:	Enter the employee's first name if known; if 'Vacant' this data field may be left blank because the system will look for 'Vacant' in the 'Last Name' data field
Class:	Enter the employee's class (Does not have to be a CB classification)
Hourly Rate:	Enter the employee's hourly wage rate
Annl Hours:	Enter the total number of hours worked annually
Tot Funds:	This field will be calculated for you
CB:	Enter "X", if employee is partially or fully funded by the CB from temporary personnel funds
Loc:	Enter "X", if employee is partially or fully funded by the Locality
Fed:	Enter "X", if employee is partially or fully federally funded
Other:	Enter "X", if employee is partially or fully funded by other sources

- Press the "Enter" key after completing the information requested
- Press 'F8' for the next blank page when applicable
- Press 'F3' to exit the screen to the Budget Request Menu



7. Option #5, Office Expense Funding Request

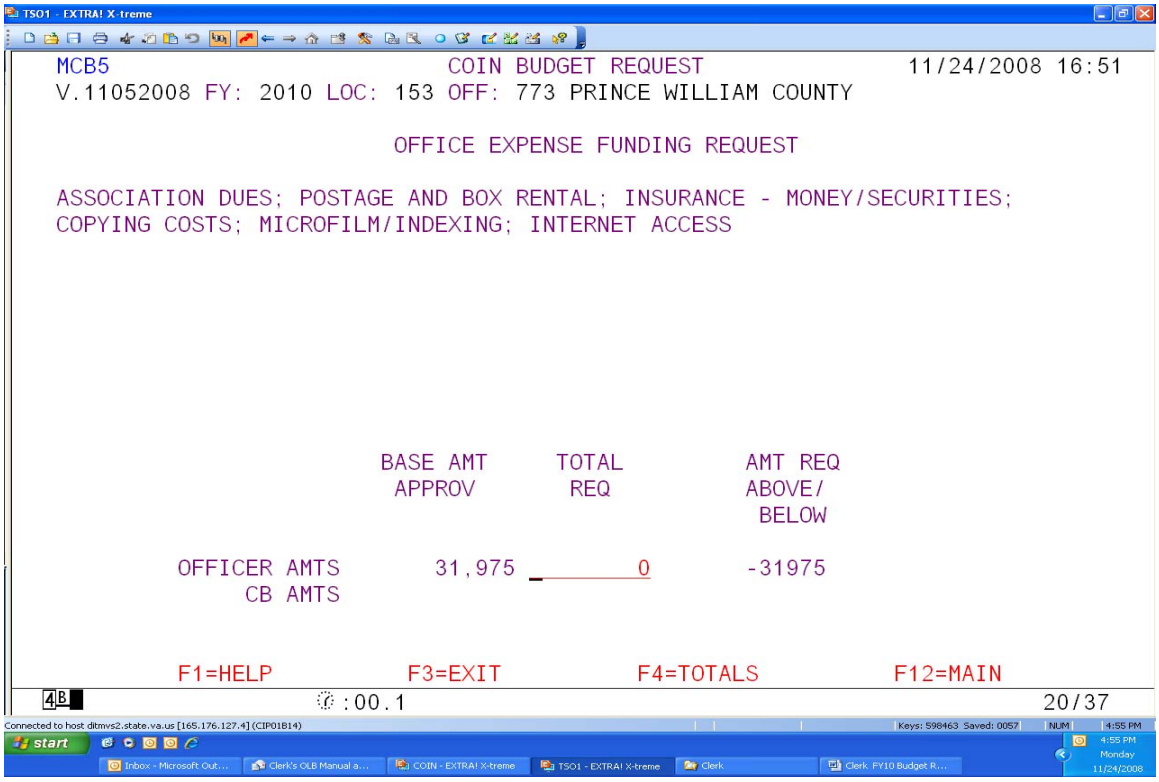
Purpose:

The Office Expense Funding Request screen is accessed from the COIN Budget Request menu. The Office Expense screen allows the user to review or update the total dollar amount requested for the Office Expense Budget request.

Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #5, Office Expense Funding Request

CLERK"S

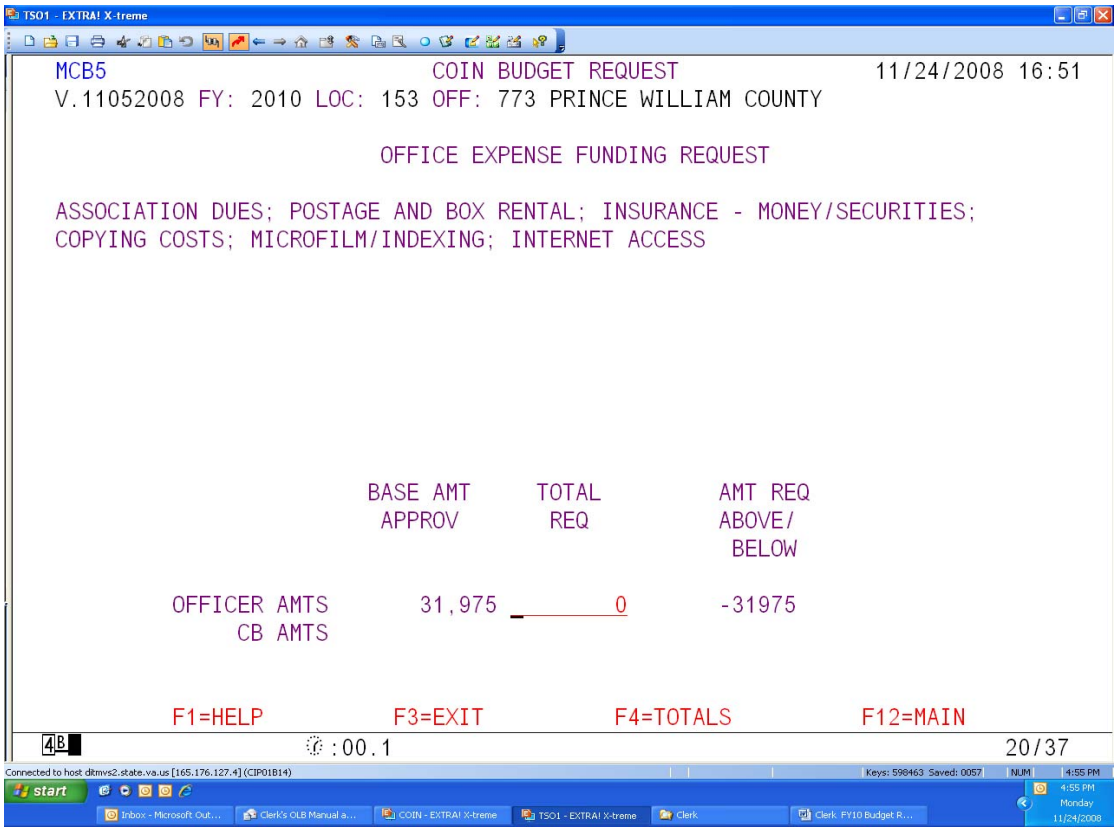


Helpful Hints:

- The total office expenses for the prior year will be displayed as your 'Base Amount Approved'

- This screen allows you to increase or decrease your office expense funding or retain the same amount in the "Total Request" field
- COIN will recalculate the 'Amount Requested Above/Below' based on the 'Total Request' entered
- Participation of the Compensation Board in Office Expenses is limited to certain items as provided by the Code of Virginia (1950), as amended
  - ✓ Any additions or transfers made during the current fiscal year may be included in the supplied figures
  - ✓ Check the supplied amount to the original Compensation Board approved Budget, or approved minutes for changes affecting the base budget.

Option #5, Office Expense Funding



Procedures:

- Press the "TAB" key to go to the next field of entry

Base Amt Approved:	Supplied by COIN
Total Request:	Enter your 'Total Request' for office expense funding
Amt Req Above/Below Approved:	This field will be calculated for you

- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

8. Option #7, Record Workload Information

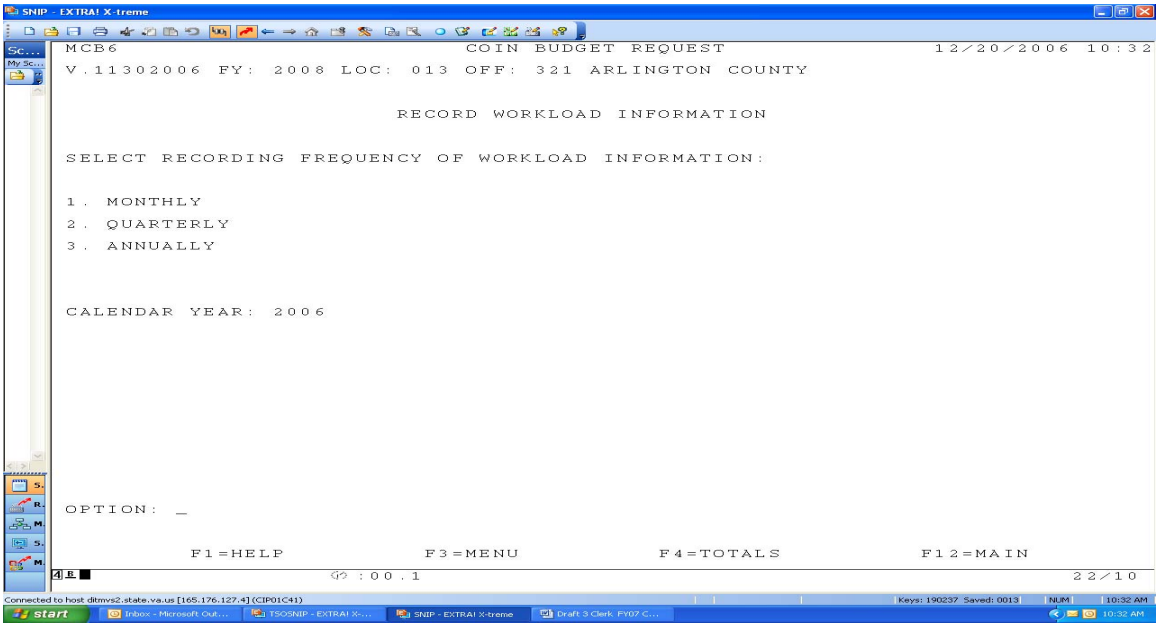
Purpose:

The Record Workload Information menu is accessed from the Budget Request menu. Users can select the frequency for recording workload information.

Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #7, Record Workload Information

CLERK"S

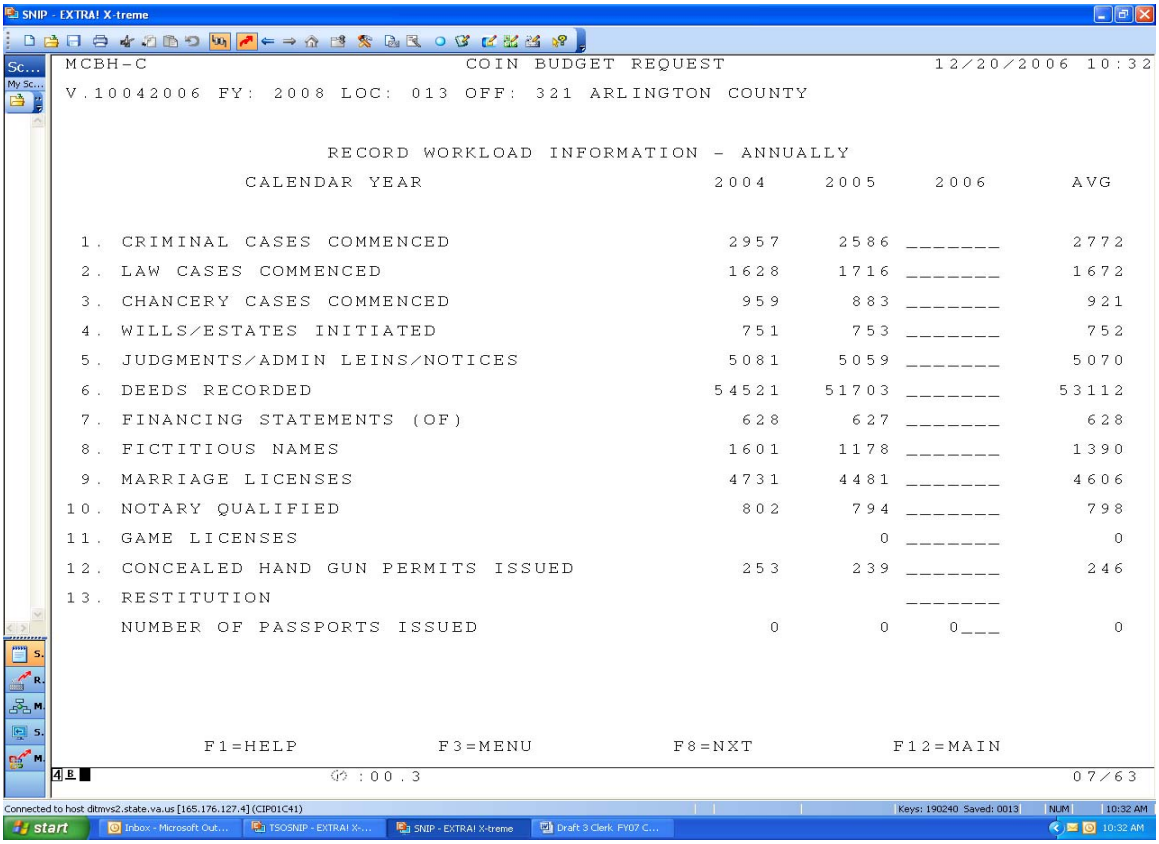


- In January 2009 offices must record one full year of workload data for Calendar Year (CY) 2008
- Provide requested information in accordance with Section 15.2-1636.7, Code of Virginia. Information requested is based **on the most recent calendar year**
- Select 'Option 3' and press the "Enter" key to proceed to the next screen
- The Workload Measures screens must be processed and an amount must be entered for each workload measure for the most recent ending calendar year
  - ✓ The screens will also display the amounts for the previous two calendar years
  - ✓ Enter the number of transactions for each workload measure listed; if not applicable, to your office enter '0', and "TAB" to the next field
  - ✓ **Do Not Leave Blanks** or the system will default the item to zero
- Press **'F3=Exit'** to exit the screen to the Budget Request Menu
- Press 'F12=Main' returns you to the COIN Main Menu

The following pages display the individual Workload Measures by program that must be completed

Option #7 Record Workload Information

Option #3 Annual Screen



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MCBH-C                          COIN BUDGET REQUEST                    12/20/2006  10:32
V.10042006 FY: 2008 LOC: 013 OFF: 321 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2004     2005     2006       AVG

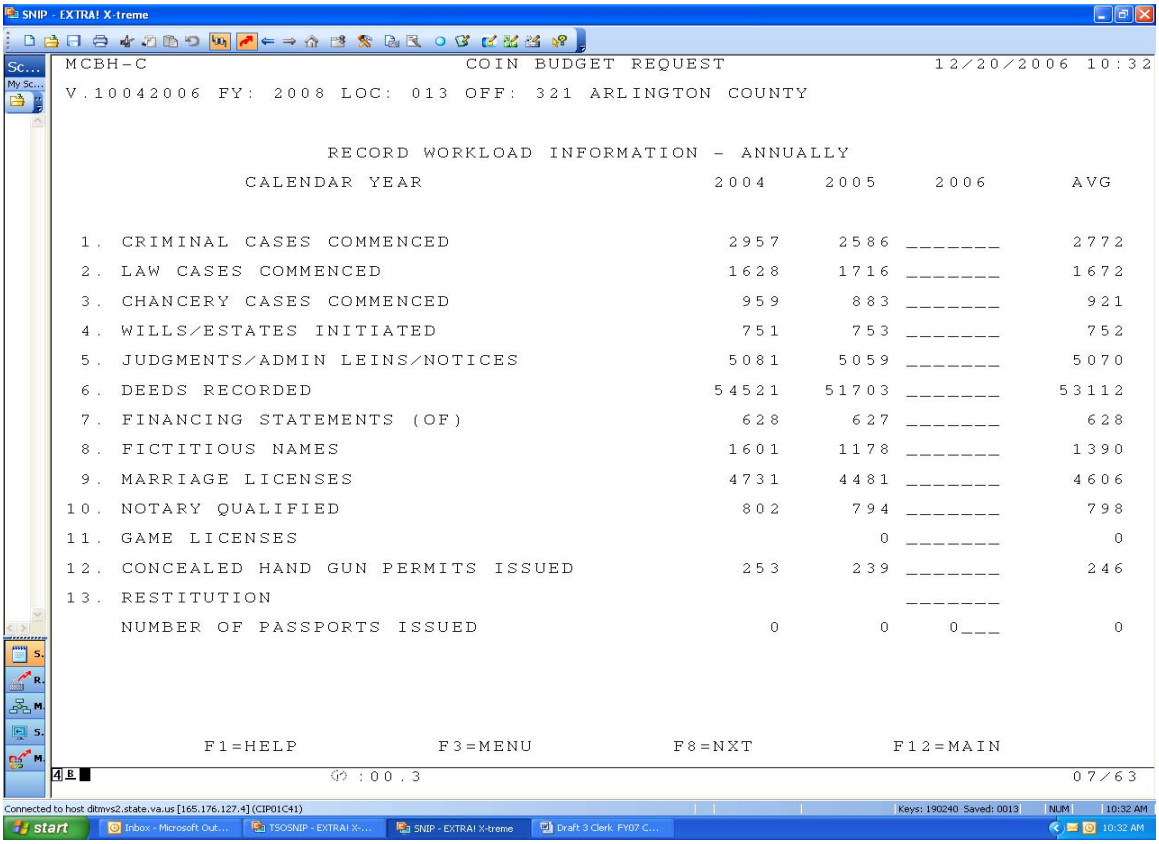
 1. CRIMINAL CASES COMMENCED                        2957     2586 _______      2772
 2. LAW CASES COMMENCED                             1628     1716 _______      1672
 3. CHANCERY CASES COMMENCED                         959      883 _______       921
 4. WILLS/ESTATES INITIATED                          751      753 _______       752
 5. JUDGMENTS/ADMIN LEINS/NOTICES                   5081     5059 _______      5070
 6. DEEDS RECORDED                                 54521    51703 _______     53112
 7. FINANCING STATEMENTS (OF)                        628      627 _______       628
 8. FICTITIOUS NAMES                                1601     1178 _______      1390
 9. MARRIAGE LICENSES                               4731     4481 _______      4606
10. NOTARY QUALIFIED                                 802      794 _______       798
11. GAME LICENSES                                      0        0 _______         0
12. CONCEALED HAND GUN PERMITS ISSUED                253      239 _______       246
13. RESTITUTION                                                   _______
    NUMBER OF PASSPORTS ISSUED                         0        0    0___         0

          F1=HELP          F3=MENU          F8=NXT          F12=MAIN
4 B                        :00.3                                              07/63
```

1. **CRIMINAL CASES:** Criminal cases commenced as reported on the monthly caseload reports. If the caseload reports are properly prepared, each count in the indictment is a separate case and each reinstatement is a separate case. Some of the work included is setting up the file and docket; summoning the grand jury and grand jury witnesses; issuing capiases; determination of indigence; receiving all papers filed; attending all hearings; processing all orders; summoning trial jurors and witnesses; securing exhibits; payment to jurors and witnesses; allowing the public and press access to case papers; keeping track of court reporter cost and recordings; keeping track of court-appointed attorney cost; computing fines and costs; collecting fines, costs and restitution; debt set-off processing; communicating with prisoner, DMV, Department of Corrections and Probation and Parole office; preparing record for appeal to higher court; filming and indexing orders and maintained files.
2. **LAW CASES COMMENCED:** Law and chancery cases commenced as reported on the monthly caseload reports. (Same as below)
3. **LAW AND CHANCERY**: Law and chancery cases commenced as reported on the monthly caseload reports. Counted at the time filed even though the case may remain on the docket for years. Any trust fund administration is included as part of the original case and not as a separate case. Reinstatements are counted as separate cases. Law cases on the average take more of the clerk's time than chancery because chancery cases rarely require a jury and many are decided in chambers on written depositions.
4. **WILLS/ESTATES INITIATED:** A file opened for a decedent, a trust or a person under a disability, counted only at the time the file is initiated and not re-counted at the time of subsequent transactions. This should include affidavits of intestate transfer. A single case may involve the probate of will, the qualification of an executor, recording a bond, recording list of heirs, certificates of qualification, recording final accounting, and perhaps many interim accounting, perhaps qualification of administrator, c.t.a., d.b.n., recording affidavit of probate notice, show cause orders and court hearings on delinquent fiduciaries; and writing clerk's order associated with any of the above. At the other extreme, a case MAY BE NOTHING MORE THAN THE RECORDING AND FILING OF AN AFFIDAVIT OF INTESTATE TRANSFER.

Option #7 Record Workload Information

Option #3 Annual Screen



```
MCBH-C                          COIN BUDGET REQUEST                    12/20/2006  10:32
V.10042006 FY: 2008 LOC: 013 OFF: 321 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2004     2005     2006       AVG

 1. CRIMINAL CASES COMMENCED                        2957     2586 _______      2772
 2. LAW CASES COMMENCED                             1628     1716 _______      1672
 3. CHANCERY CASES COMMENCED                         959      883 _______       921
 4. WILLS/ESTATES INITIATED                          751      753 _______       752
 5. JUDGMENTS/ADMIN LEINS/NOTICES                   5081     5059 _______      5070
 6. DEEDS RECORDED                                 54521    51703 _______     53112
 7. FINANCING STATEMENTS (OF)                        628      627 _______       628
 8. FICTITIOUS NAMES                                1601     1178 _______      1390
 9. MARRIAGE LICENSES                               4731     4481 _______      4606
10. NOTARY QUALIFIED                                 802      794 _______       798
11. GAME LICENSES                                      0        0 _______         0
12. CONCEALED HAND GUN PERMITS ISSUED                253      239 _______       246
13. RESTITUTION                                                   _______
    NUMBER OF PASSPORTS ISSUED                         0        0    0___         0

          F1=HELP          F3=MENU          F8=NXT          F12=MAIN
4 B                        :00.3                                              07/63
```

5. **JUDGEMENTS/ADMIN LENDS/NOTICES:** All court judgments and administrative liens and notices required to be recorded in the judgment lien docket. Only original judgments are counted. The work involved includes receiving the judgment with fee at the counter or through judgment worth fee at the counter or throughout the mail, and logging it in; filming or typing the judgment in the docket book according to local practice; maintaining an up-to-date index, assisting the public in determining what is on their record; and recording assignments and releases.
6. **DEEDS RECORDED**: Each separate instrument recorded in the land records. When more than one instrument is included in a single document recorded, they can be counted separately. The work involved includes computing the fees and taxes and collection payment; logging into the instrument; filming and indexing; maintains the land records for use by the public, and providing transfer.
7. **FINANCING STATEMENTS:** Only original filings are counted. Continuation and termination statements are considered part of the same case.

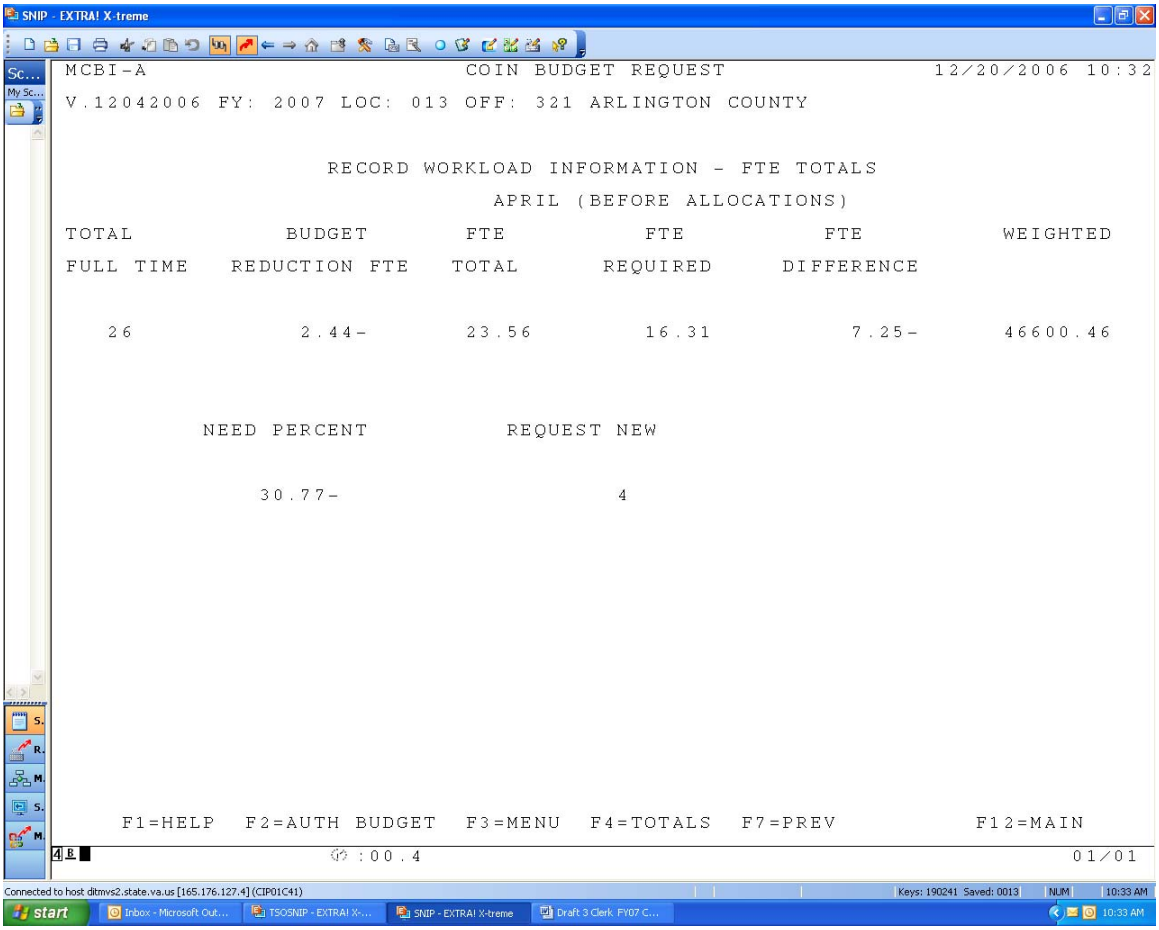
8-11 FICTITIOUS NAME, MARRIAGE LICENSE, NOTARY QUALIFIED, GAME LICENSES: Count each activity that occurs, except for game licenses count each privilege, even if it is on one sheet of paper, for which the clerk receives a $1.00 fee per privilege.

12. **CONCEALED HANDGUN PERMITS:** Each application filed, whether approved or not and including any transfer from another jurisdiction. The court reported should be consistent with the number reported on the monthly caseload statistics reports.
13. **RESTITUTION:** The total number of checks written for Restitution within the Calendar year.

Option #7 Record Workload Information

Option #3 Annual Screen

Pressing "F8" from the Annual workload screen brings up the percent of need screen for your office.



This screen shows the following information based on the data entered during the budget request process:

- Total Full Time- The total full time employees currently in the office
- Budget Reduction FTE- The FTE adjustment made to current CB FTE and is based on the actual salary amounts reduced as a result of budget reductions divided by the average salary of a position.
- FTE Total- The total number of Full Time equivalent positions this office has
- FTE Required- According to the workload information they have submitted and the weights attached to each workload, this is how many full time positions this office should have.
- FTE Difference- The difference between the FTE Total and FTE Required
- Weighted- The weighted workload is the combined result of multiplying the 3-year average of each workload item by their applicable weights.
- Need Percent- The percent of need for your office
- Requested New- The number of new positions requested

Option #7 Record Workload Information

STAFFING METHODOLOGY

Calendar year transaction data for each workload element is supplied by each of the Clerks' offices during the budget request process each year. To determine the hours worked, a three-year average of transactions is multiplied by the following weights developed in conjunction with the VCCA, which represent the median time per transaction reported to perform each type of workload transaction:

Workload Elements	Weights
Criminal Cases	8.59
Law Cases	2.31
Chancery Cases	2.31
Wills & Estates	1.62
Deeds	0.61
Judgments	0.44
Financing Statements	0.35
Marriage Licenses	0.66
Game Licenses	0.20
Fictitious Names	0.38
Notary Qualified	0.39
Concealed Handgun Purchases	0.64
Restitution	0.46

After determining the total weighted workload for each office, staff need is calculated by the following formula:

Staff Need = Fixed Staff + (Total weighted workload/ Variable workload factor)

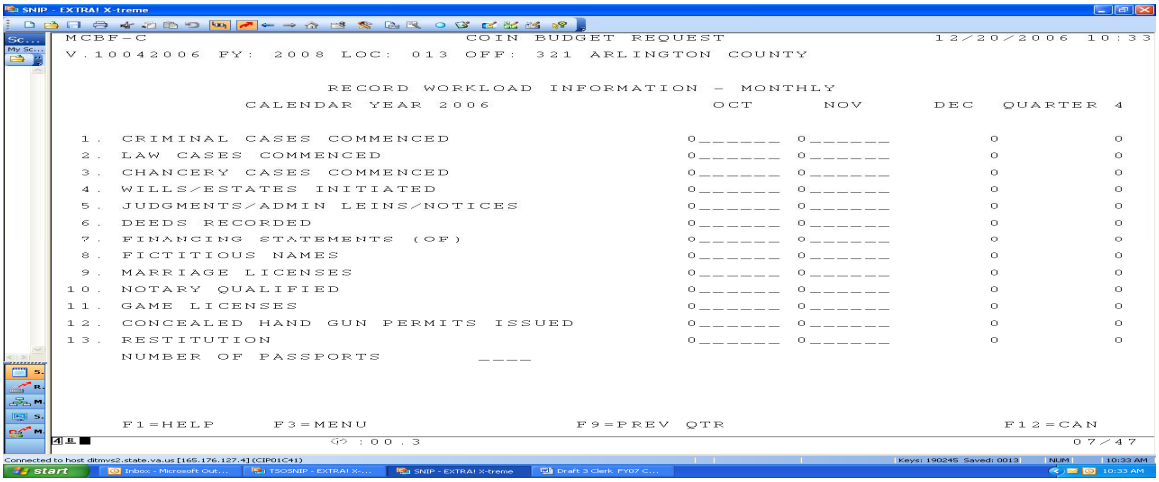
Office Size based on Weighted Workload Hours			Fixed Staff	Variable Wkld Factor
Small	0	11,999	2.50	3,500
Mid	12,000	59,999	3.00	
Large	60,000	229,999	5.00	
Super	230,000	+	7.00	

The allocation of additional hourly-wage (part-time) funds is made using the same methodology.

Option #7 Record Workload Information

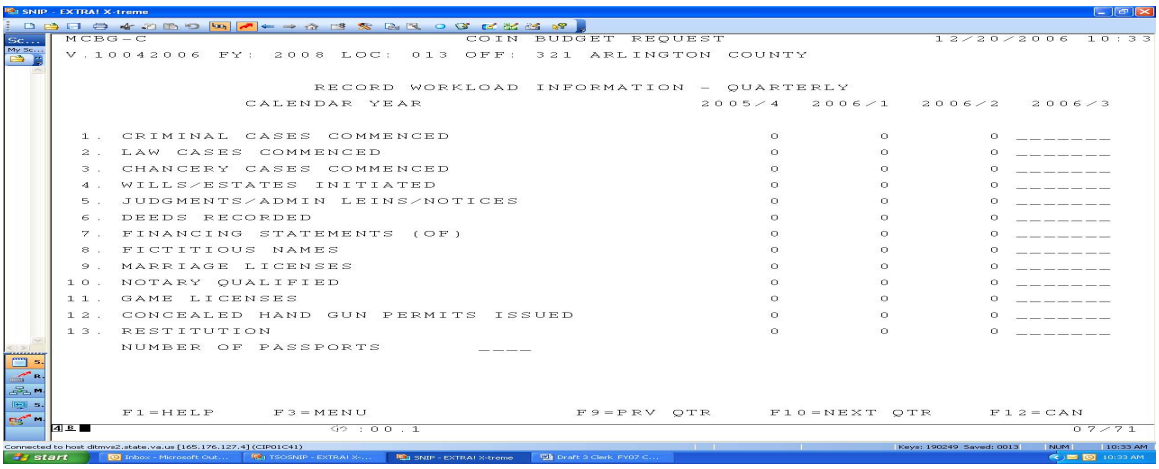
- Beginning February 1 offices can begin recording workload data monthly, quarterly or annually for CY 2008
- This can be done by selecting options 1, 2, or 3 from the "Record Workload Information" menu
- If you choose option 1 "Monthly" you will need to enter workload data each month but will not have to enter quarterly or annual data
- If you choose option 2 "Quarterly" you will need to enter workload data each quarter but will not have to enter monthly or annual data
- If you choose option 3 "Annual" you will only have to enter workload data in January for the previous year
- Follow the same steps as those used for annual data (for CY 2007) to input CY 2008 data

Option #1 Monthly Screen



Option #2 Quarterly Screen

- If you choose option 2 "Quarterly" you will need to enter workload data each quarter but will not have to enter monthly or annual data
- Quarterly data will first be entered in March



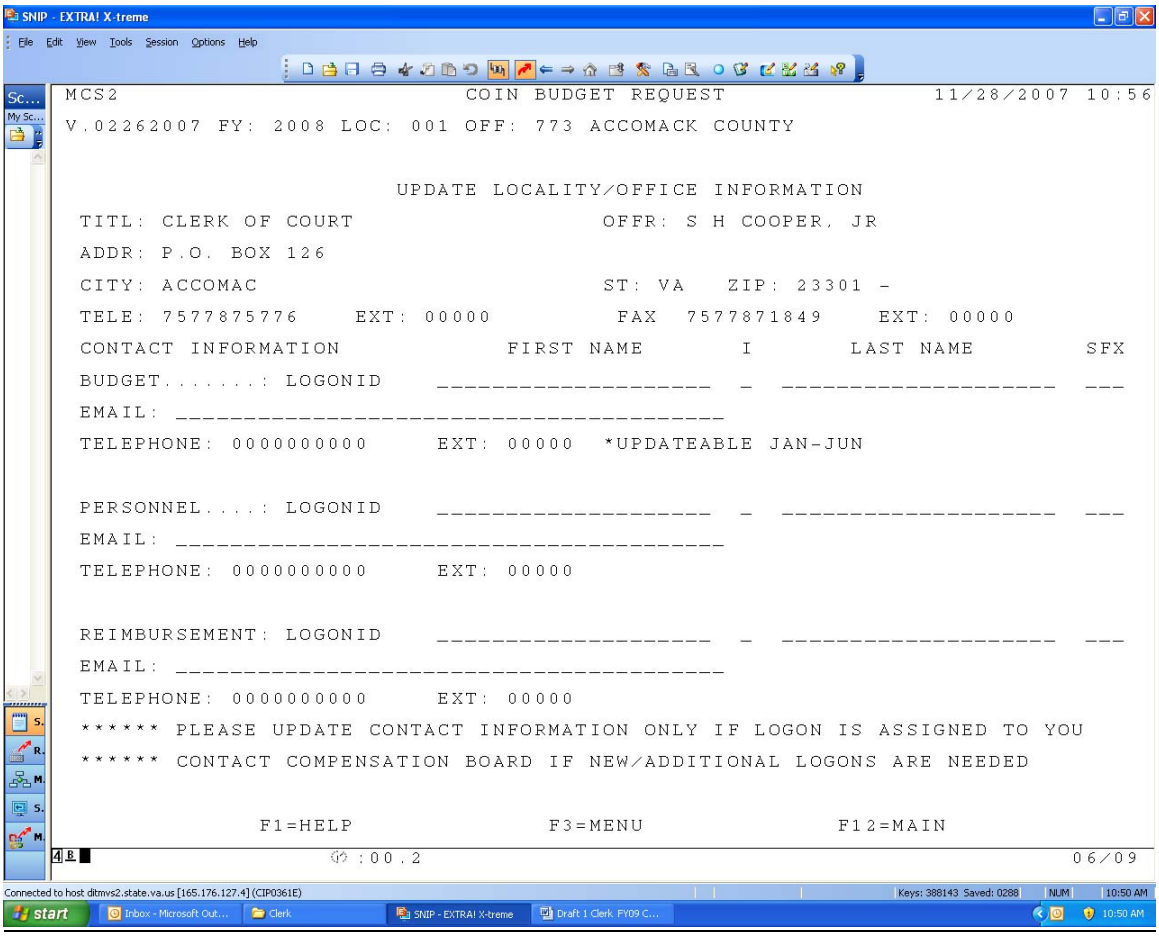
9. Option #8 – Update Locality Information

Purpose:

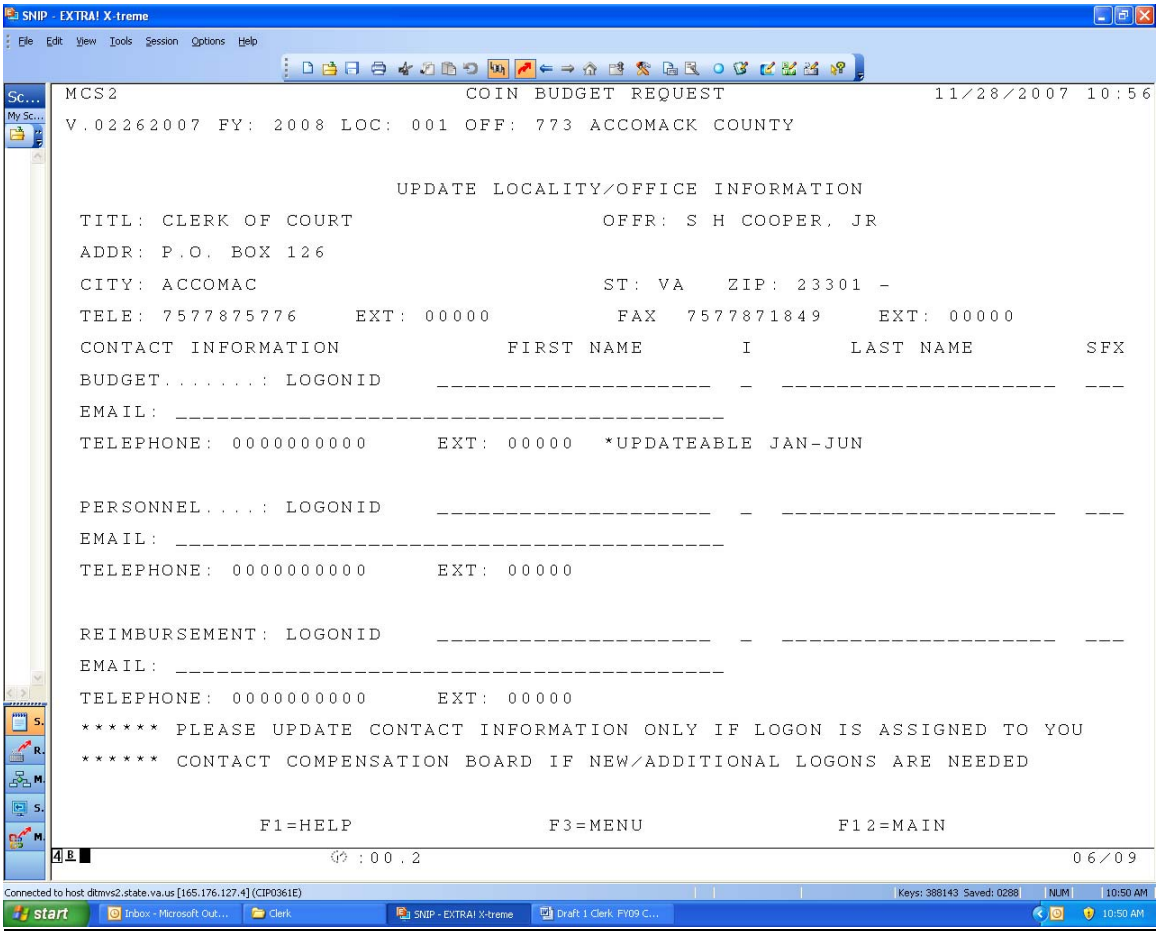
This screen will be displayed when 'Option #8, Update Locality Information' is selected on the Budget Request Menu. This screen is available for updating the locality address, phone, and fax numbers. It is also used to advise the Compensation Board staff of appropriate contacts for questions regarding the budget request, personnel processing, and reimbursement processing.

Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #8, Update Locality Information



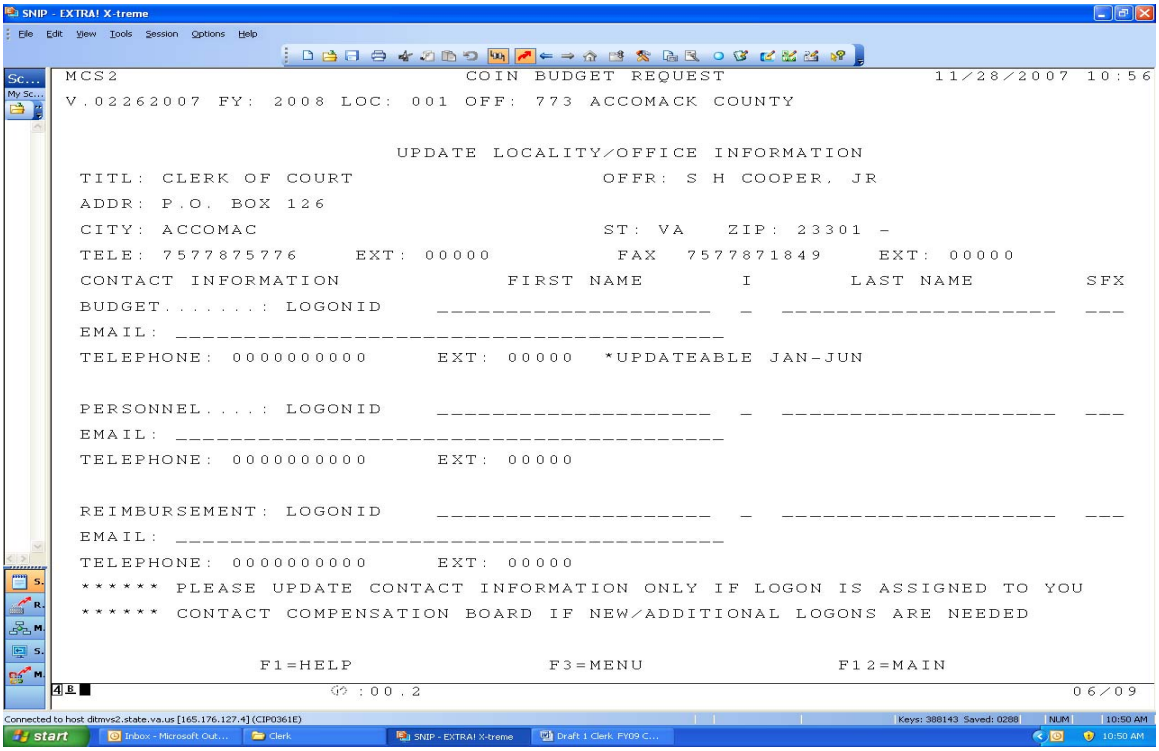
Option #8 Update Locality Information



Helpful Hints:

- Enter the SCB USERID of the person completing the specified task, then depress the "Enter" key to auto-fill the name associated with this USERID
- Data fields on the Update Locality Information screen must be completed before Certifying the Budget Request
- It is very important that we obtain the name of the person we can contact if we have questions regarding your Budget Request
- Screens will time out after 15 minutes of inactivity.
- Budget Contact- office contact for current budget request submission
- Personnel Contact- office contact for personnel questions (CB10s)
- Reimbursement Contact- office contact for reimbursement information
- These contacts may be the same or different employee(s)
- Cannot update any contact information fields until the SCB USERID is entered

Option #8 Update Locality Information



Procedures:

This screen can be used to change address, phone and fax numbers for your office. To change the information currently displayed on the screen, type over the information and depress the "enter" key. You will receive an update confirmation message.

1. Press the "TAB" key to move to the desired field.
2. Enter the following information to update the locality information

Title:	For display purposes only.
Officer Name:	For display purposes only.
Address:	Enter the correct mailing address for your office.
City:	Enter the correct City for your mailing address.
State:	Enter the correct State for your mailing address.
Zip:	Enter the correct Zip code for your mailing address. If the last 4 positions of the zip code are not known, you may leave this field blank.
Telephone:	Enter the Correct Phone number for your office.
Fax #:	Enter the Correct Facsimile number for your office.

3. Press the "ENTER" key, when you have corrected or completed the information requested
4. Enter the following contact information for the budget contact, personnel contact, and reimbursement contact: (if the contact information is the same for all, enter only one-time)
   a. Type the contact's SCB USERID on top of the word 'LOGONID' and press the 'Enter' key, the name for the SCB USERID will appear (Cannot update any contact information fields until the SCB USERID is entered)
   b. Enter the email address and telephone number for the contact
   c. Press the 'Enter' key, when you have entered the information requested
5. Press 'F3 =Exit' to exit the screen to budget request menu

10. Option #10 - Certify Budget Request

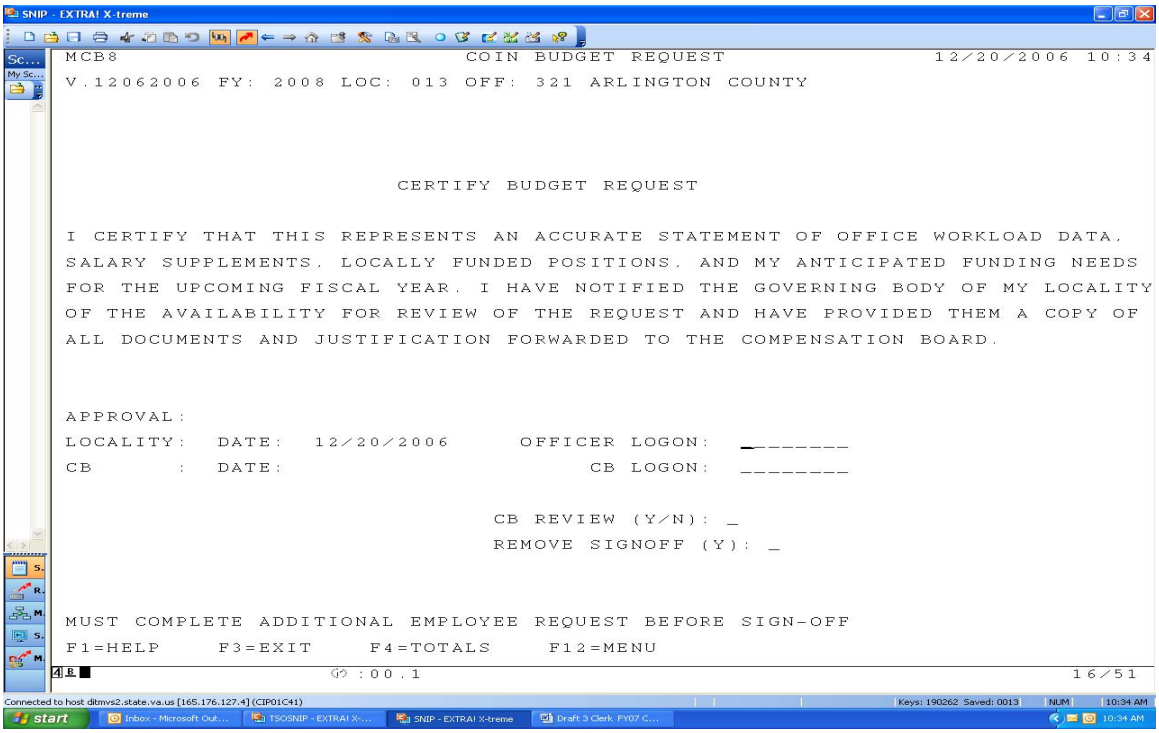
Purpose:

The Certify Budget Request is accessed from the COIN Budget Request Menu. This screen enables the Local Officer to certify that the budget request is accurate and also enables the Compensation Board to approve that the budget request is within CB policy.

Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #10, Certify Budget Request

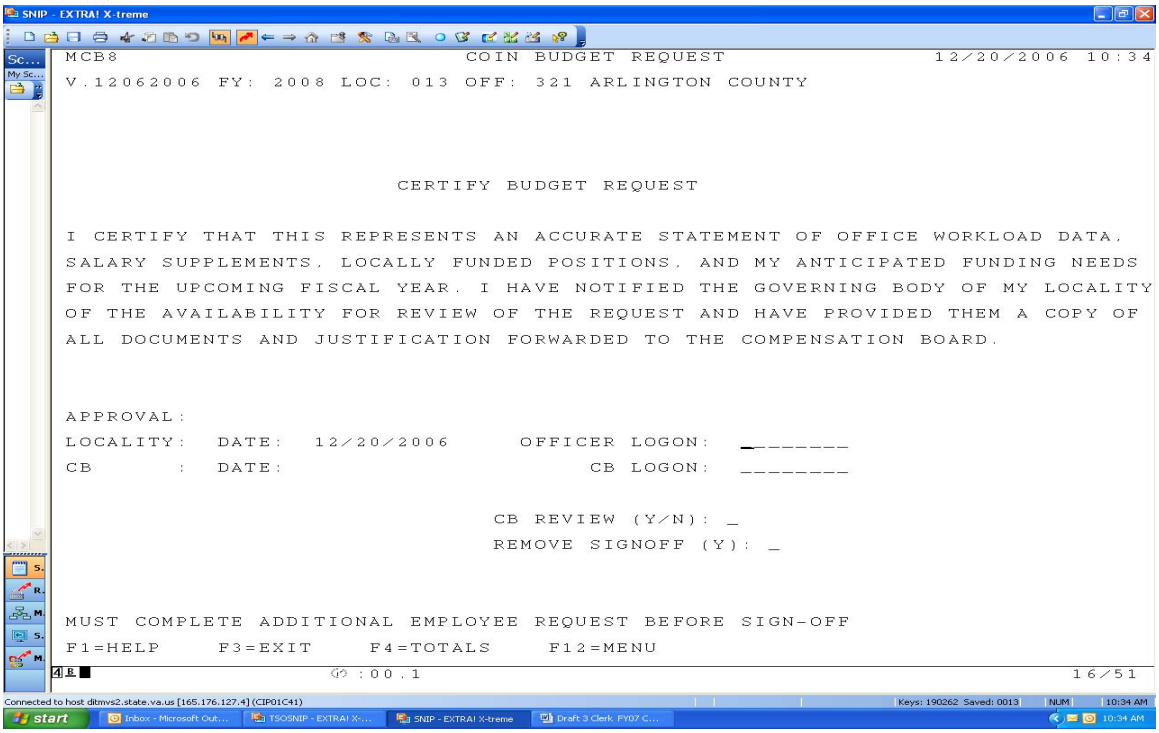
CLERK"S



Helpful Hints:

- If you entered the Officer's SCB USERID to submit your budget request and all screens that have required fields have not been processed, the system will not accept your sign off
  - ✓ Under this condition, the system will inform you that a required process has not been completed and a message will direct you to the incomplete process selection on the On-line Budget Menu
- Once you have submitted your budget request you may not further modify your request
  - ✓ From the time of your submission, which is due February 1, you may only view your submission

Option #10, Certify Budget Request



Helpful Hints (Continued):

- Upon approval of your budget on May 1, you will be able to view your budget submission as approved, which will include any adjustments made by the Compensation Board
- Please check your request for any final changes
  - ✓ If the officer's SCB USERID has been entered, you cannot make changes to your Budget Request.
  - ✓ If your screen has error messages on the bottom of the screen, you have not Certified
    - o Please go back to the 'Option' shown in the error on the bottom of your screen and complete the required fields, and then return to the certification screen to certify your budget request

Procedures:

- Enter the officer's SCB USERID as the 'Officer Logon' to Certify the fiscal year budget submission
- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu

11. Option #11, Comments

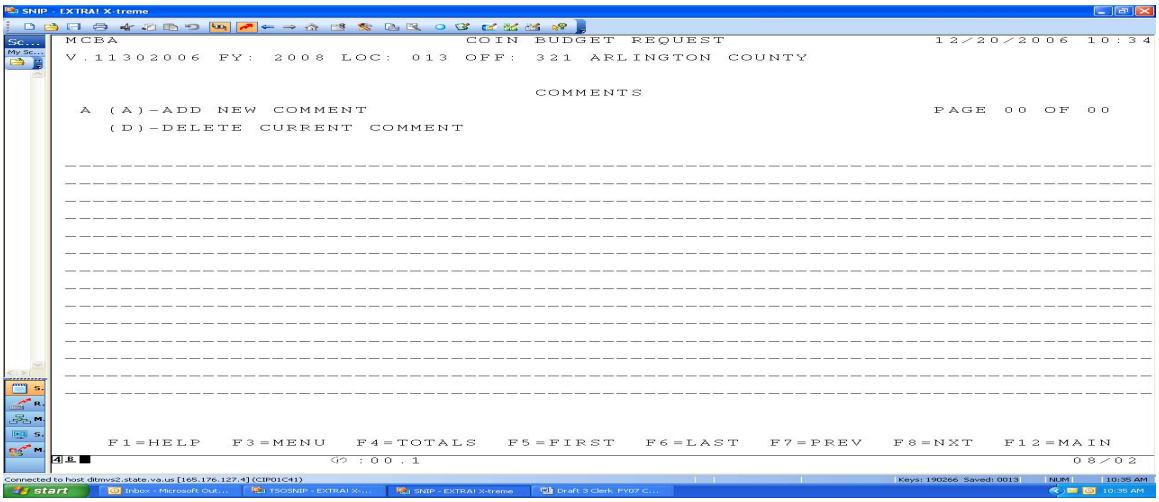
PURPOSE:

The Comments screen is accessed from the COIN Budget Request Menu. This screen allows comments by any local officer or Compensation Board representative.

NAVIGATIONAL PATH:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #11, Comments

CLERK"S



HELPFUL HINTS:

- There are unlimited 'Comment' screens that allow the entry of comments in a free form format
- This screen will Time Out if your computer is idle for 15 minutes
  - ✓ Suggest that you have all the information needed before starting this process
- The use of these screens is optional and the data entered is not edited
- This screen is available for any information you think is necessary for the Compensation Board to know about your on-line budget request

PROCEDURES:

- Enter "A" to add a comment or "D" to delete a comment
- Input the information you want to address
- Press the "Enter" key after your comments have been entered
- Reference the section of the on-line budget request your comments are referring to
  - ✓ Example: Option #2, Additional Employee Request
- Press 'F3' to exit the screen to the Budget Request Menu

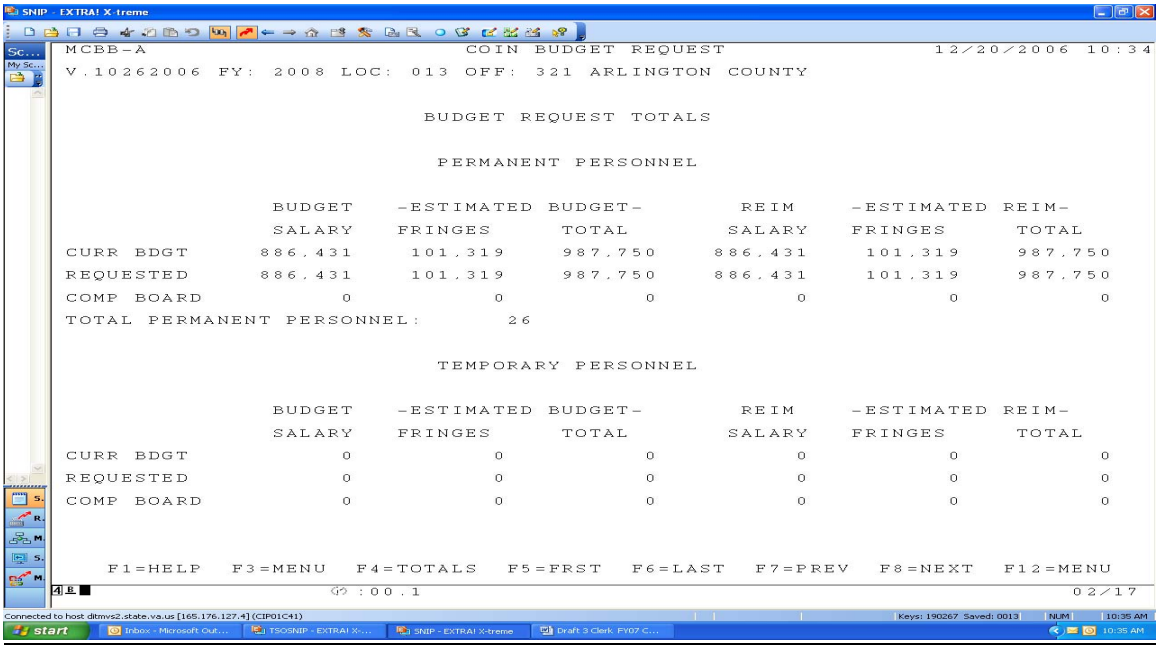
12. Function Key 'F4' - Budget Request Totals

PURPOSE:

The 'F4=Totals' Function Hot Key screen reflects your Budget Request Totals. These screens capture your Current Budget, Budget Requested Totals and Compensation Board Approved Budget for the next fiscal year that will be displayed by May 1 of each year. The categories captured within these screens are Permanent Personnel, Additional Personnel, Temporary Personnel, Office Expenses, and Equipment.

NAVIGATIONAL PATH:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Function Key 'F4'



```
MCBB-A                          COIN BUDGET REQUEST                    12/20/2006 10:34
V.10262006 FY: 2008 LOC: 013 OFF: 321 ARLINGTON COUNTY

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT      886,431     101,319     987,750     886,431    101,319     987,750
REQUESTED      886,431     101,319     987,750     886,431    101,319     987,750
COMP BOARD           0           0           0           0          0           0
TOTAL PERMANENT PERSONNEL:       26

                               TEMPORARY PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT            0           0           0           0          0           0
REQUESTED            0           0           0           0          0           0
COMP BOARD           0           0           0           0          0           0

  F1=HELP   F3=MENU   F4=TOTALS   F5=FRST   F6=LAST   F7=PREV   F8=NEXT   F12=MENU
                                  :00.1                                      02/17
```

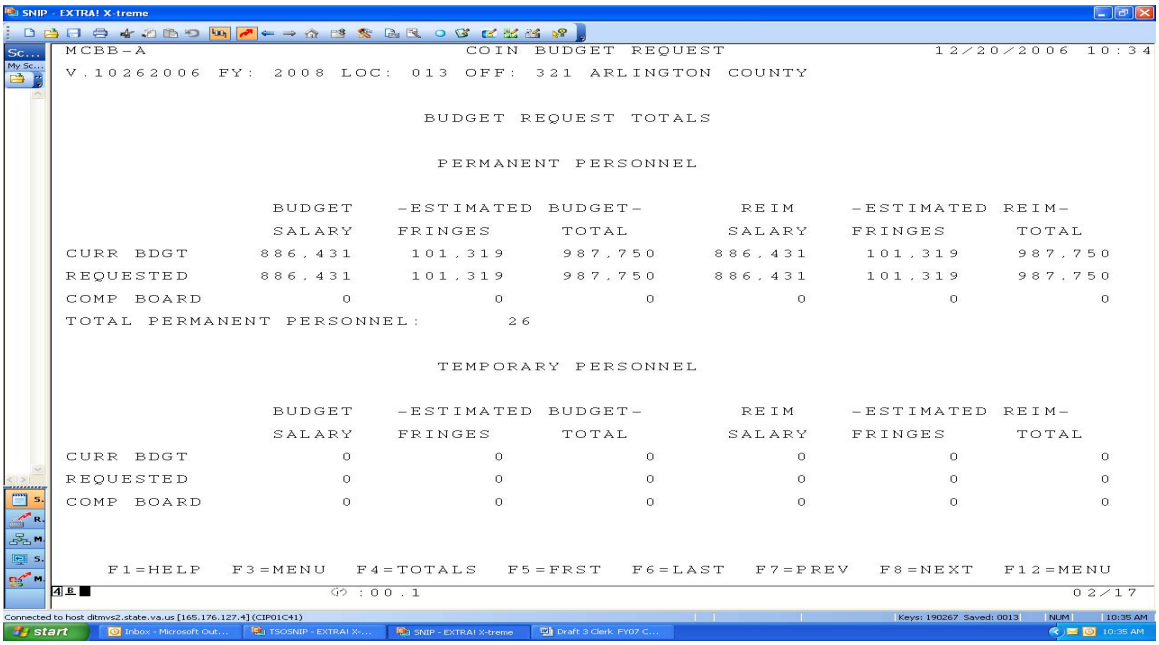
HELPFUL HINTS:

- The Budget Request Totals are displayed on three screens
  - ✓ Screen #1 displays the totals for Permanent and Temporary Personnel funding requests
  - ✓ Screen #2 displays the totals for Equipment funding requests
  - ✓ Screen #3 displays the totals for all budget request categories
- To navigate through the screens use the 'F7' key to view a previous page or 'F8' to view the next page
- This screen can be accessed from any Budget Request screen by depressing the 'F4' key
- Pressing the 'F3' key will return you to the screen from which you accessed the Budget Request Totals screen.

'F4' Budget Request Totals

CLERK"S

1ST SCREEN OF 3:



```
MCBB-A                          COIN BUDGET REQUEST                    12/20/2006 10:34
V.10262006 FY: 2008 LOC: 013 OFF: 321 ARLINGTON COUNTY

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY    FRINGES      TOTAL
CURR BDGT      886,431     101,319     987,750     886,431     101,319     987,750
REQUESTED      886,431     101,319     987,750     886,431     101,319     987,750
COMP BOARD           0           0           0           0           0           0
TOTAL PERMANENT PERSONNEL:       26

                               TEMPORARY PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY    FRINGES      TOTAL
CURR BDGT            0           0           0           0           0           0
REQUESTED            0           0           0           0           0           0
COMP BOARD           0           0           0           0           0           0

  F1=HELP   F3=MENU   F4=TOTALS   F5=FRST   F6=LAST   F7=PREV   F8=NEXT   F12=MENU
                                  :00.1                                     02/17
```

PROCEDURES:

- **1ST SCREEN OF 3:**

  - ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your currently authorized budget information as of December 31st

  - ✓ **'REQUESTED'** – This line of information refers to the budget request that you have made or are in the process of making
    - This information is subject to change as you make revisions to your budget request
    - This information becomes 'locked-in' when the Constitutional Officer or designee certifies their budget request

  - ✓ **'COMP BOARD' -** This line of information refers to the budget request as being reviewed or approved by the Compensation Board
    - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
    - When budget requests are approved by the Compensation Board (May 1st of each year) this information also becomes 'locked-in'

  - ✓ **'FRINGE'** benefits listed are estimates only

  - ✓ **'REIMBURSABLE'** figures displayed are the actual dollar amounts that will be returned to your locality

'F4' Budget Request Totals

CLERK"S

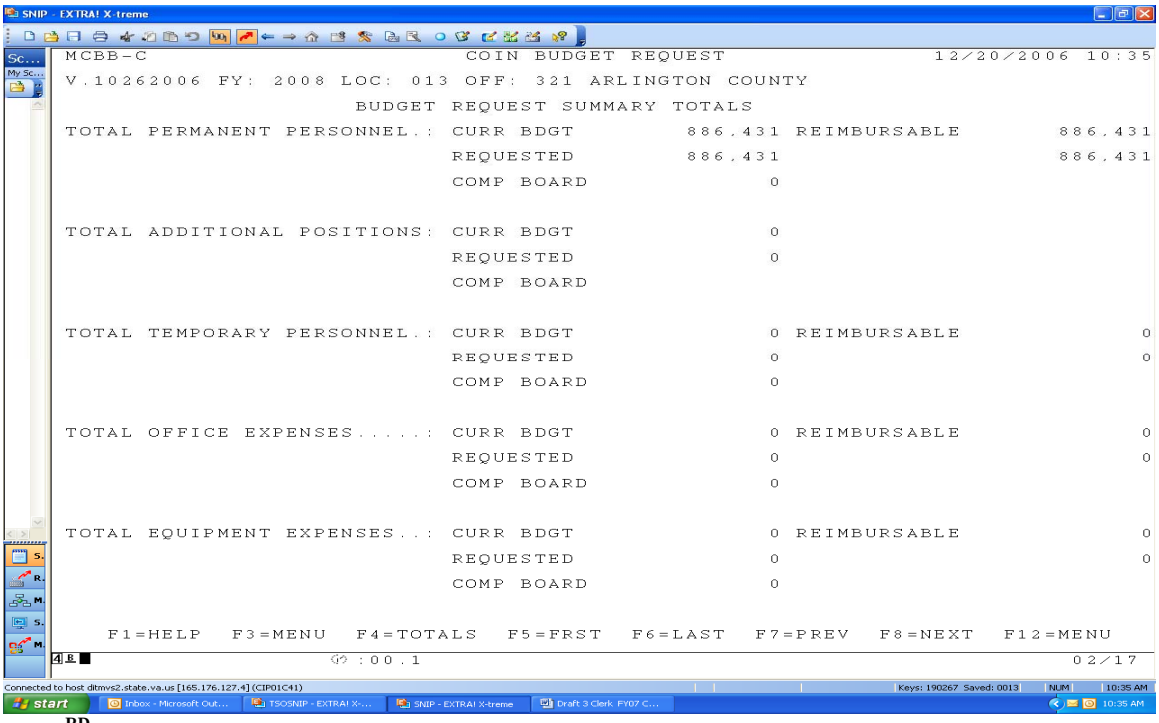
2ND SCREEN OF 3:

- **2ND SCREEN OF 3:**
  - ✓ This screen displays equipment totals by equipment category
  - ✓ **FIRST LINE** of information displayed relates to the request you have made or are in the process of making
    - o This information is subject to change as you make revisions to your budget request
    - o Line 1 becomes 'locked-in' when the Constitutional Officer certifies their budget request
  - ✓ **SECOND LINE** of information displayed relates to the in-progress or approved request as completed by the Compensation Board
    - o During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
    - o When budget requests are approved by the Compensation Board (May 1st of each year) this information also becomes 'locked-in'

'F4' Budget Request Totals

CLERK"S

3RD SCREEN OF 3:



```
MCBB-C                          COIN BUDGET REQUEST                    12/20/2006  10:35
V.10262006 FY: 2008 LOC: 013 OFF: 321 ARLINGTON COUNTY
                          BUDGET REQUEST SUMMARY TOTALS
TOTAL PERMANENT PERSONNEL.: CURR BDGT        886,431 REIMBURSABLE        886,431
                            REQUESTED        886,431                     886,431
                            COMP BOARD             0

TOTAL ADDITIONAL POSITIONS: CURR BDGT              0
                            REQUESTED              0
                            COMP BOARD

TOTAL TEMPORARY PERSONNEL.: CURR BDGT              0 REIMBURSABLE              0
                            REQUESTED              0                           0
                            COMP BOARD             0

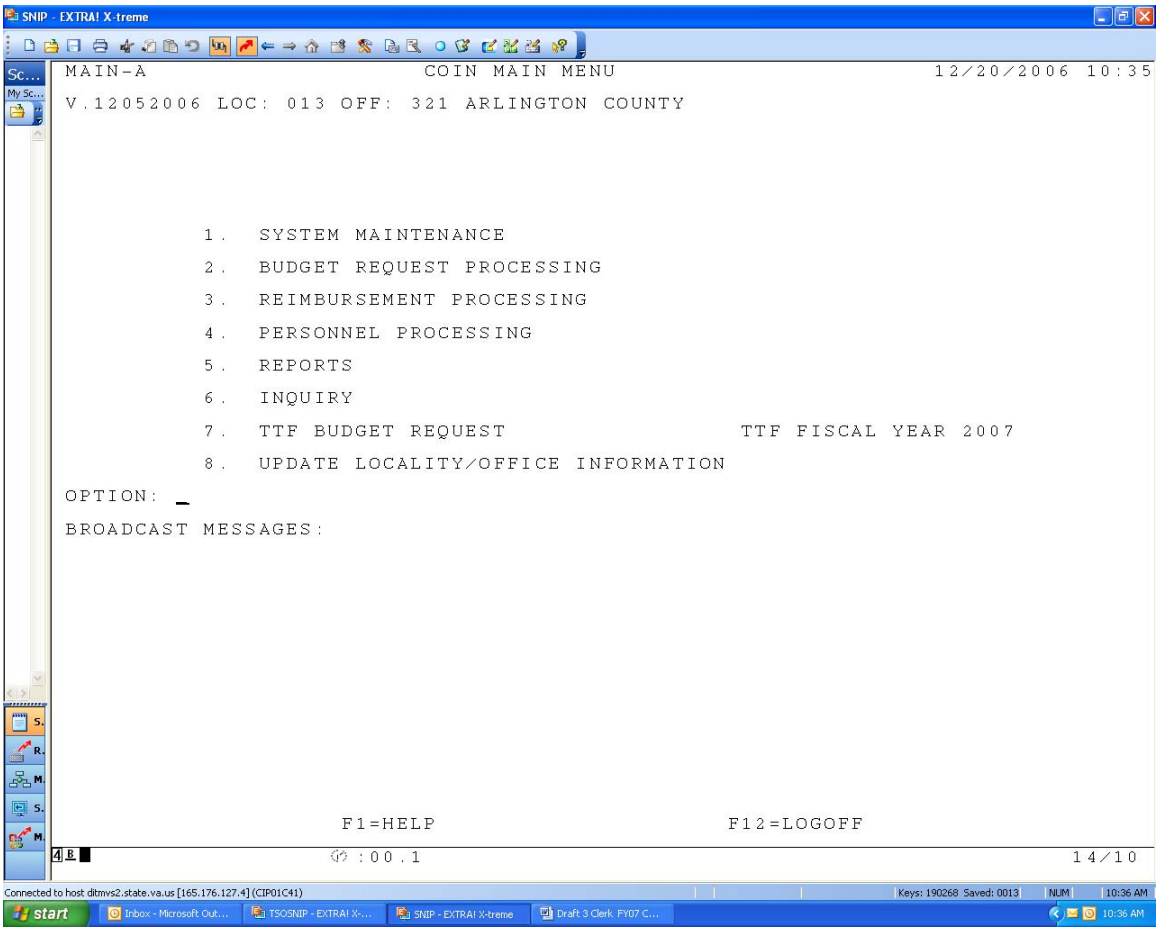
TOTAL OFFICE EXPENSES.....: CURR BDGT              0 REIMBURSABLE              0
                            REQUESTED              0                           0
                            COMP BOARD             0

TOTAL EQUIPMENT EXPENSES..: CURR BDGT              0 REIMBURSABLE              0
                            REQUESTED              0                           0
                            COMP BOARD             0

  F1=HELP   F3=MENU   F4=TOTALS   F5=FRST   F6=LAST   F7=PREV   F8=NEXT   F12=MENU
4 E                          :00.1                                          02/17
```

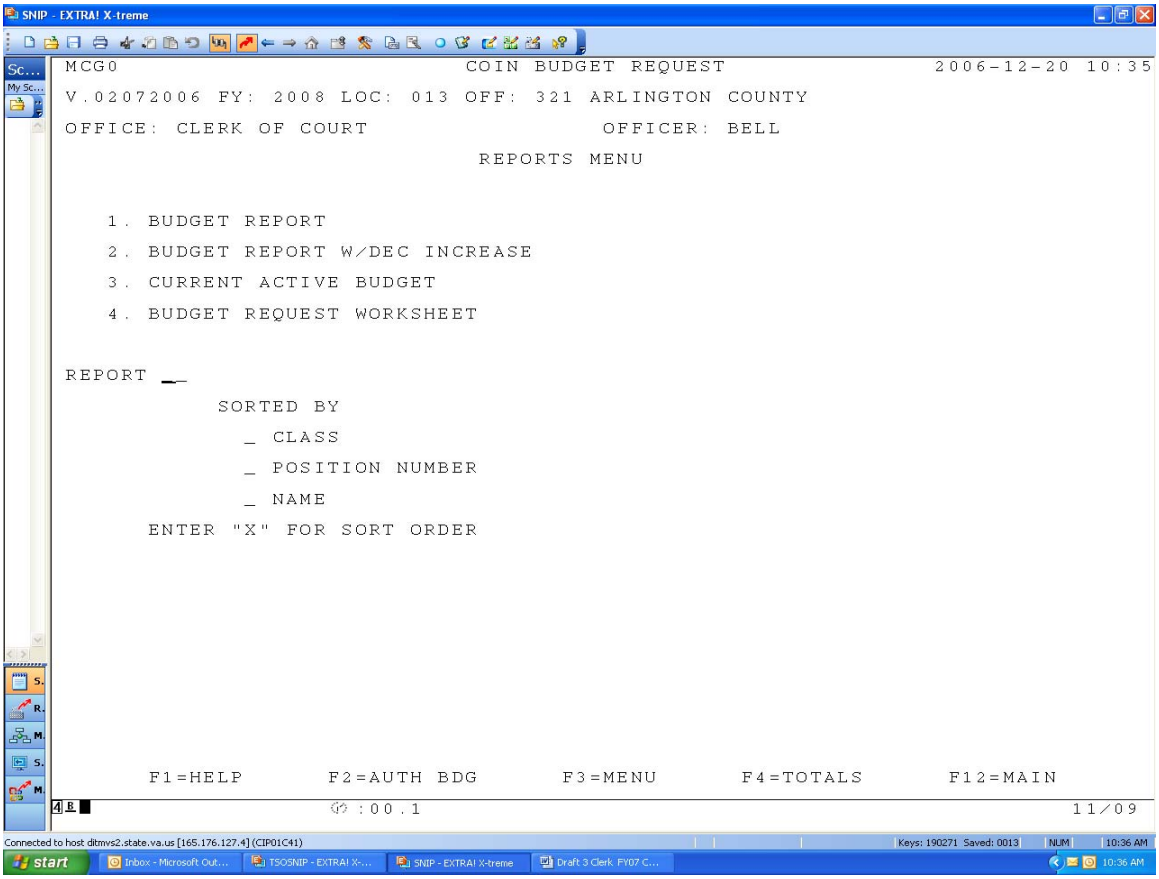
- **3RD SCREEN OF 3:**
  - ✓ Displays totals for each budget request broad-based category:
    - Permanent Personnel
    - Additional Positions
    - Temporary Personnel Funding
    - Office Expense Funding
    - Equipment Requests
  - ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your currently authorized budget information as of December 31st
  - ✓ **'REQUESTED'** – This line of information refers to the budget request that you have made or are in the process of making
    - This information is subject to change as you make revisions to your budget request
    - This information becomes 'locked-in' when the Constitutional Officer or designee certifies their budget request
  - ✓ **'COMP BOARD'** - This line of information refers to the budget request as being reviewed or approved by the Compensation Board
    - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
    - When budget requests are approved by the Compensation Board (May 1st of each year) this information also becomes 'locked-in'
- Press 'F3' to exit the screen to the Budget Request Menu

13. Main Menu Option #5 Budget Reports



- **Select Option #5 "Reports"**

Main Menu Option #5 - Budget Reports

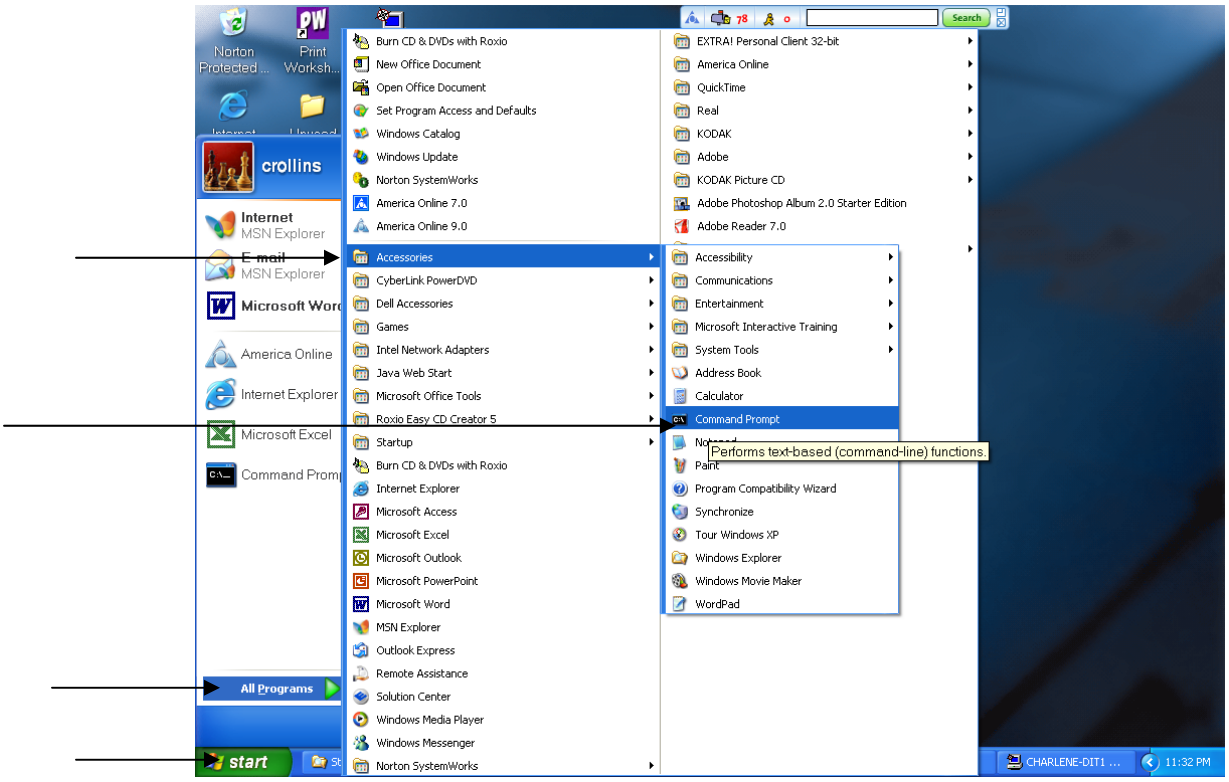


There are 4 versions of the Budget Report that are available.

- Option #1 "Budget Report"- This is the Historical Budget Report, listing all changes to your budget since it went into effect.
- Option #2 "Budget Report W/Dec Increase"- This is the Budget with the December 1 increases factored in. This report is available in November.
- Option #3 "Current Active Budget"– This is the Budget as it was originally approved.
- Option #4 "Budget Request Worksheet"- This is the Budget Request Worksheet, this report may be downloaded to enter all personnel changes before entering them into the COIN system.

Enter the desired option along with the desired sort sequence, if no sort sequence is specified the Budget Report will be printed in Class Code order. Governing Bodies will have the ability to request a Budget Report for each office in their locality. You will need to enter the Starting Office and Ending Office as well as the Sort Sequence. We recommend submitting a separate request for each office in your locality.

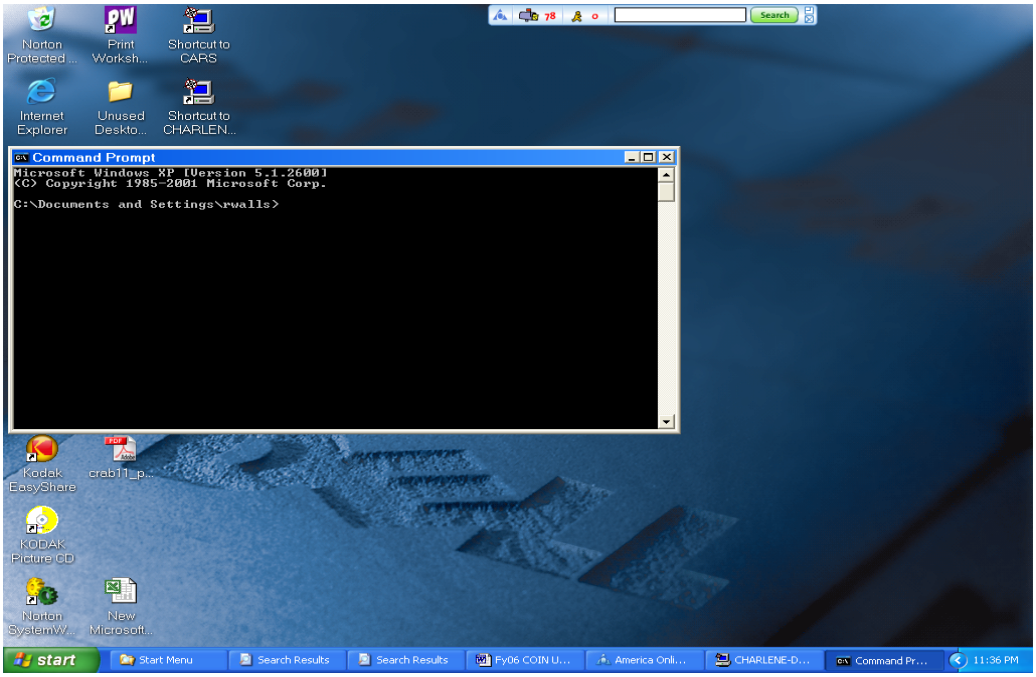
14. Download Instructions



Download Instructions

1. Click "Start" – "All Programs" – "Accessories" – "Command Prompt"

Download Instructions



2.- TYPE:	**ftp** Press the "ENTER" key
3. -TYPE:	***open ditmvs2.state.va.us*** Press the "Enter" key
4. -USERNAME:	***scbte06*** *(lowercase)* Press the "Enter" key
5. -PASSWORD:	***scbte06*** *(lowercase)* Press the "Enter" key
6. -TYPE:	***user*** *(lowercase)* Press the "Enter" key
7. -USERNAME:	***Type your COIN Userid*** *(lowercase)* Press the "Enter" key
8. -PASSWORD:	***Type your COIN password*** (lowercase) Press the "Enter" key
9. -TYPE:	***get*** Press the "Enter" key
10-TYPE:	***'scb.prod.coin.l001.o773.wbudget.rtf'*** Press the "Enter" key (lowercase with single quotes, lowercase L-locality l001.lowercase O-office.budget.rtf)

1. The file to download for option 1 is 'scb.prod.coin.lxxx.oxxx.budget.rtf'
2. The file to download for option 2 is 'scb.prod.coin.lxxx.oxxx.budget2.rtf'
3. The file to download for option 3 is 'scb.prod.coin.lxxx.oxxx.abudget.rtf'
4. The file to download for option 4 is 'scb.prod.coin.lxxx.oxxx.wbudget.rtf'

11.- LOCAL FILE NAME:	**"c:/budgetreport.rtf"(**with double quotes) Press the "Enter" key
12. BYTES OF DATA TRANSFERRED:	Press the "Enter" key
13. TO EXIT:	Type **quit** – Press the "Enter" key Type **exit** – Press the "Enter" key
14. TO PRINT:	Open Microsoft Word
15. OPEN FILE:	**Budgetreport.rft** (or the name you gave the file)

Download Instructions

Additional Printing Instructions:

- Open Microsoft word
- Look for a file that ends with the extension '.rtf' (denotes Rich Text Format)

  OR
- Open Window Explorer
- Click on Local Disk (C:)
- Right click on the file
- Select print.

These files should require no additional formatting for printing.

Technical Assistance

If you should experience problems with retrieving a file, and would like to have your Budget Report emailed to you, please email one of the individuals listed below. Please be sure to include your Locality number and your Office number in your email request.

Anne Wilmoth – anne.wilmoth@scb.virginia.gov
Dan Munson – dan.munson@scb.virginia.gov
Craig Giegerich – craig.giegerich@scb.virginia.gov
Cheryl Gustafson – cheryl.gustafson@scb.virginia.gov

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15. Appendix

Classifications And Pay Plans

CLERK'S

CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE CLERK OF CIRCUIT COURT
DECEMBER 1, 2008 - JUNE 30, 2009

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
MICROFILM TECHNICIAN	MT	1	Administrative	19,856	37,371
GENERAL OFFICE CLERK CLERK TYPIST II	GOC CTII				
DEPUTY CLERK I CASHIER	DCI CASH	2	Sr. Administrative	23,723	45,666
BOOKKEEPER SENIOR CLERK TYPIST	BKKR SCT				
ACCOUNTING TECHNICIAN DEPUTY CLERK II	AT DCII	4	Professional	28,362	58,322
DEPUTY CLERK III	DCIII				
ADMINISTRATIVE ASSISTANT	AA				
DEPUTY CLERK IV	DCIV	7	Sr. Professional	33,885	76,172
ACCOUNTANT	ACCT				
ASSISTANT CHIEF DEPUTY	ACD				
CHIEF DEPUTY CLERK I	CDCI	8	Supervisory/ Management	44,058	116,345
COMPTROLLER	COMP				
CHIEF DEPUTY CLERK II	CDCII				
CHIEF DEPUTY CLERK III	CDC 3				

*** Per Code of Virginia, §15.2-1627.1B, the salary of any employee of a Constitutional Officer cannot exceed 90% of the salary of the Constitutional Officer.**