

Constitutional Officer Information Network

C  I N

Budget Request Guide

Commissioners of the Revenue

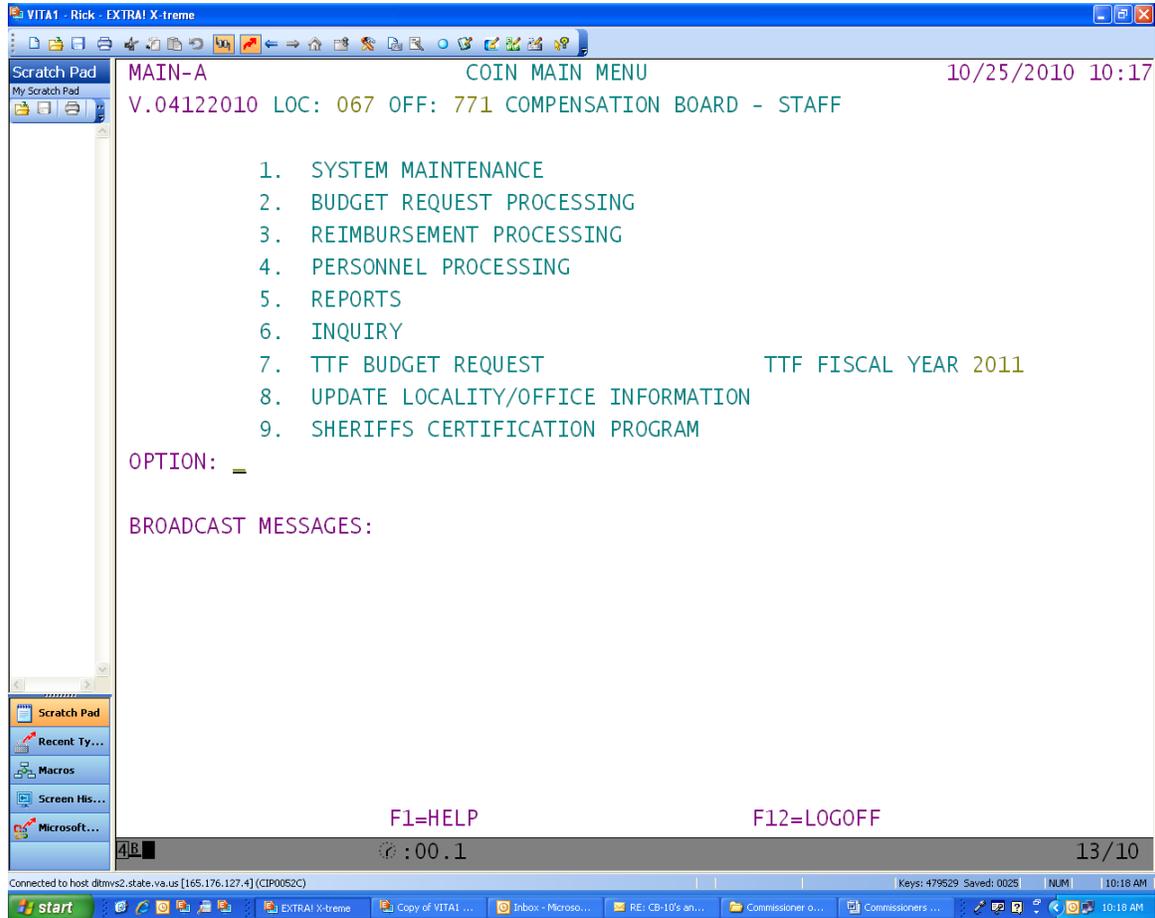
Compensation Board
December 1, 2013

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1. COIN MAIN MENU



- Select Option #2 “Budget Request Processing”



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

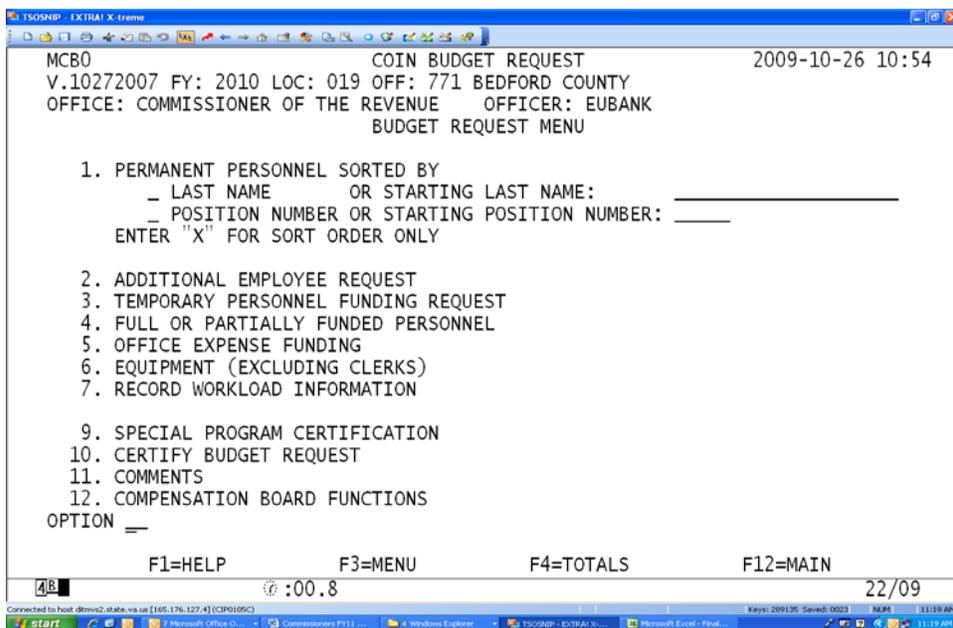
Purpose:

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

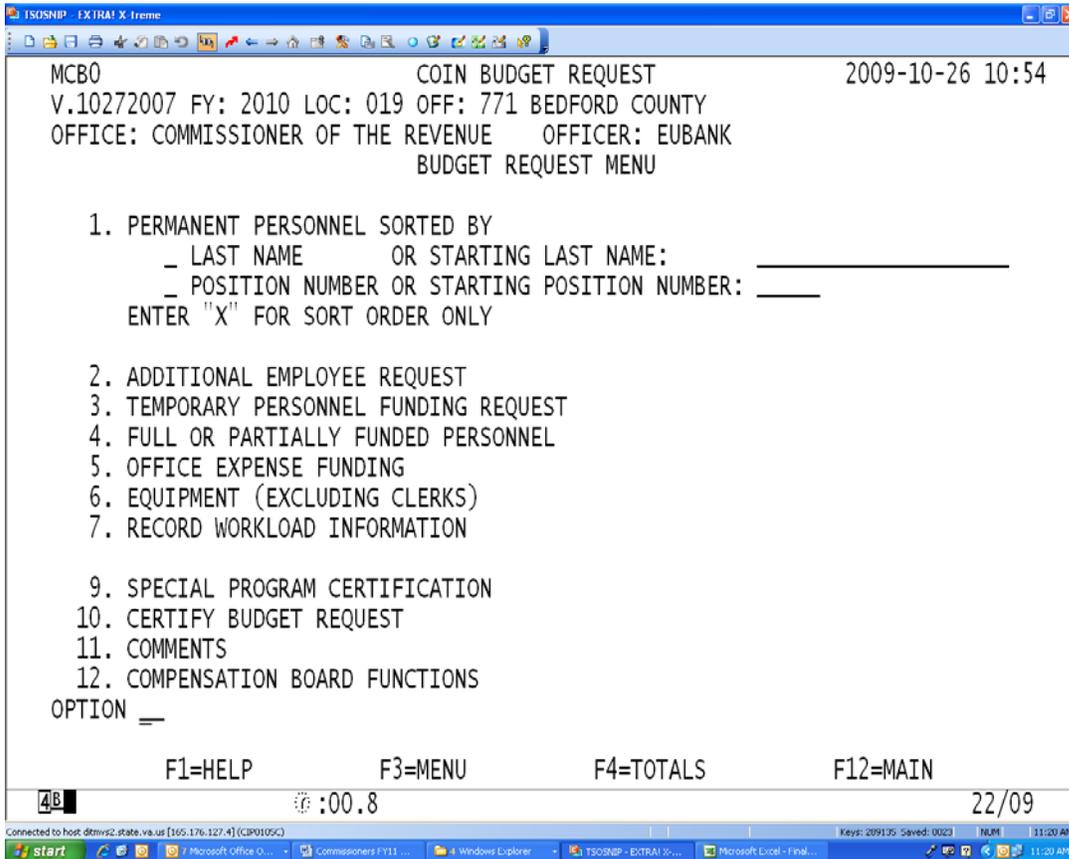
COMMISSIONERS OF THE REVENUE



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



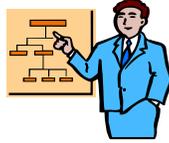
Helpful Hints (Continued):

- 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

**CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE
BUDGET REQUEST (OLB)**



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

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TSOSNIP - EXTRA! X-treme

MCB1 COIN BUDGET REQUEST 2009-10-26 11:20
 V.01162009 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

PERMANENT PERSONNEL SORTED BY LAST NAME

CHG	POS	SSN	LAST NAME	FIRST NAME	ANNUAL APPROVED	LOCAL SALARY	SALARY SUPPL	AMT REQ ABOVE	SALARY REQ	REIMB SAL AMT	CLASS	CLASS CHANGE
00007	000000000		VACANT		25587	26735	1148	0	25587	12793	DI	
		25587	26735		1148		0	25587	12793	DI		
00001	****6448		CREASY	JULIE	34022	36965	2943	0	34022	17010	MMT	
		34022	36965		2943		0	34022	17010	MMT		
00002	****4476		DELLIS	BETTY	37116	38694	1578	0	37116	18558	MDIII	
		37116	38694		1578		0	37116	18558	MDIII		
											TOTAL	0008

BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED
 F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F12=MAIN

4B :00.4 01/01

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Option #1 Permanent Personnel

MCB1 COIN BUDGET REQUEST 2009-10-26 11:20
V.01162009 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

PERMANENT PERSONNEL SORTED BY LAST NAME

CHG	POS	SSN	ANNUAL APPROVED	LOCAL SALARY	LAST NAME	FIRST NAME	SALARY SUPPL	AMT REQ ABOVE	SALARY AMT REQ	REIMB SAL AMT	CLASS	CLASS CHANGE
	00007	000000000			VACANT							
			25587	26735			1148	0	25587	12793	DI	
			25587	26735			1148	0	25587	12793	DI	
	00001	****6448			CREASY	JULIE						
			34022	36965			2943	0	34022	17010	MMT	
			34022	36965			2943	0	34022	17010	MMT	
	00002	****4476			DELLIS	BETTY						
			37116	38694			1578	0	37116	18558	MDIII	
			37116	38694			1578	0	37116	18558	MDIII	
											TOTAL	
											0008	

BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F12=MAIN

01/01

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 on Permanent Personnel screen in 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 Enter and 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

Reimb Sal Amt: For 771, this will appear with the % amount reimbursed - i.e. the 50% amount for Deputies

Class: Supplied by system

Class Change: Enter the class you are making a request to change for a salary alignment for the employee currently in this position.
(Do Not Enter A CB10 For This Request)

- After all requested data has been entered, press "Enter" to update and save information.
- Press 'F8' to proceed to the next page
- Press 'F3' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE
BUDGET REQUEST (OLB)



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

CLASS	ENTRY LEV SAL	NUM OF POSITIONS	TOTAL AMT REQ
CT	19856 *	0	0
	19856	0	0
CTII	19856 *	0	0
	19856	0	0
DI	19856 *	0	0
	19856	0	0
GC	19856 *	0	0
	19856	0	0
SECI	19856 *	0	0
	19856	0	0
TEI	19856 *	0	0
	19856	0	0
			TOTAL 0006

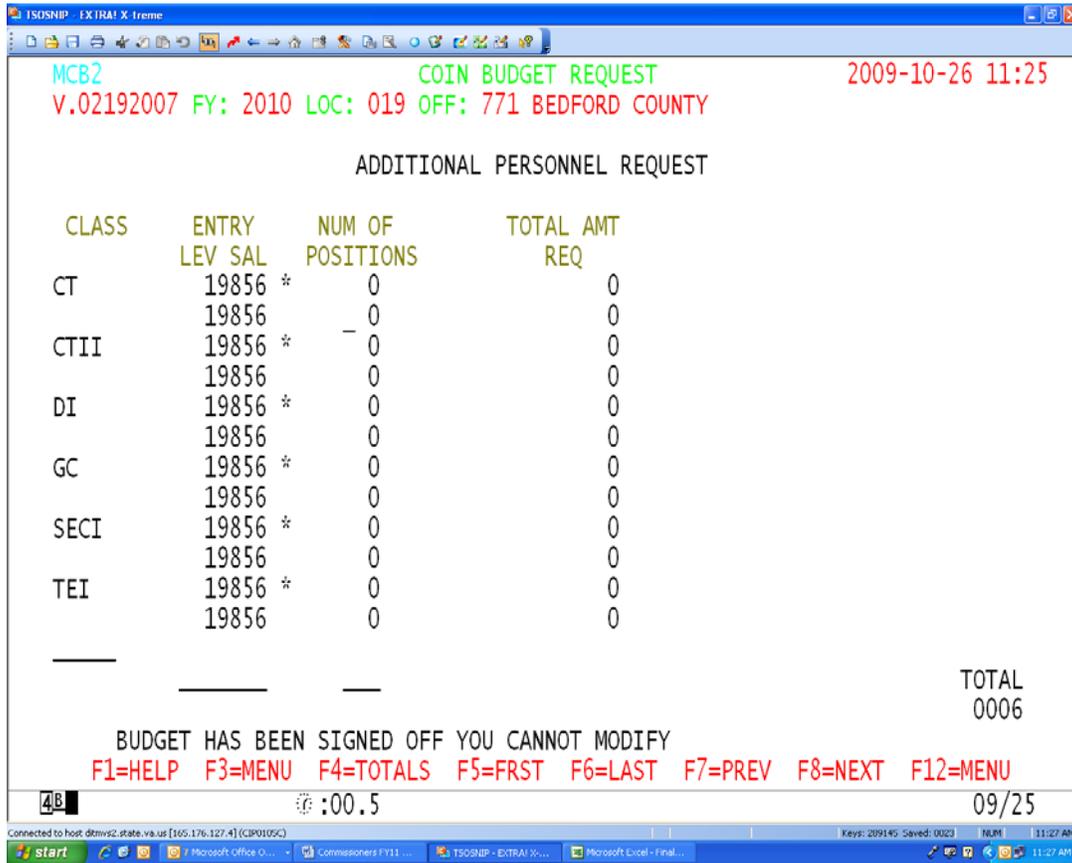
BUDGET HAS BEEN SIGNED OFF YOU CANNOT MODIFY
F1=HELP F3=MENU F4=TOTALS F5=FRST F6=LAST F7=PREV F8=NEXT F12=MENU

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 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 must 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 FY145, as they were in FY134, based upon the request and in accordance with the Compensation Board's staffing standards
- Valid 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 scale 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

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MCB3 V.03072007 FY: 2010 LOC: 019 COIN BUDGET REQUEST 2009-10-26 11:27
 OFF: 771 BEDFORD COUNTY

TEMPORARY PERSONNEL FUNDING REQUEST

BASE AMOUNT APPROVED	TOTAL REQUESTED	AMOUNT REQUESTED ABOVE/ BELOW
0	0	0
0	0	0

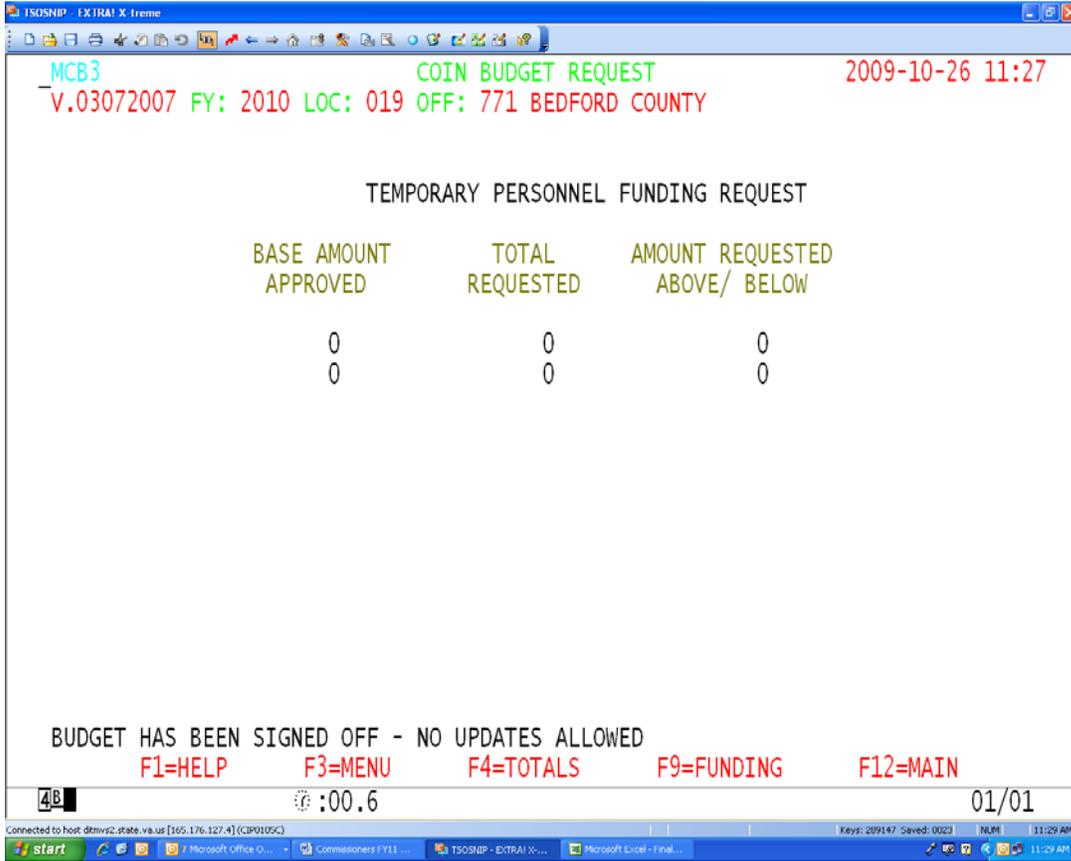
BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED
 F1=HELP F3=MENU F4=TOTALS F9=FUNDING F12=MAIN

01/01

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 in 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 approved Compensation Board minutes states that this 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 Screen 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

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TSOSNIP - EXTRA! X-treme

MCBD COIN BUDGET REQUEST 10/26/2009 11:29
 V.01312007 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

PAGE 001 OF 001

FULLY OR PARTIALLY FUNDED PERSONNEL
 (DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)

DEL	LAST NAME	FIRST NAME	CLASS	HOURLY RATE	ANNL HOURS	TOTAL FUNDS	-FUND CB	SOURCE-LOC	FED	OTH
_	WHITE	VICKIE	CLERK	009.00	2000	18000	X			
						TOTAL FUNDS	18000			

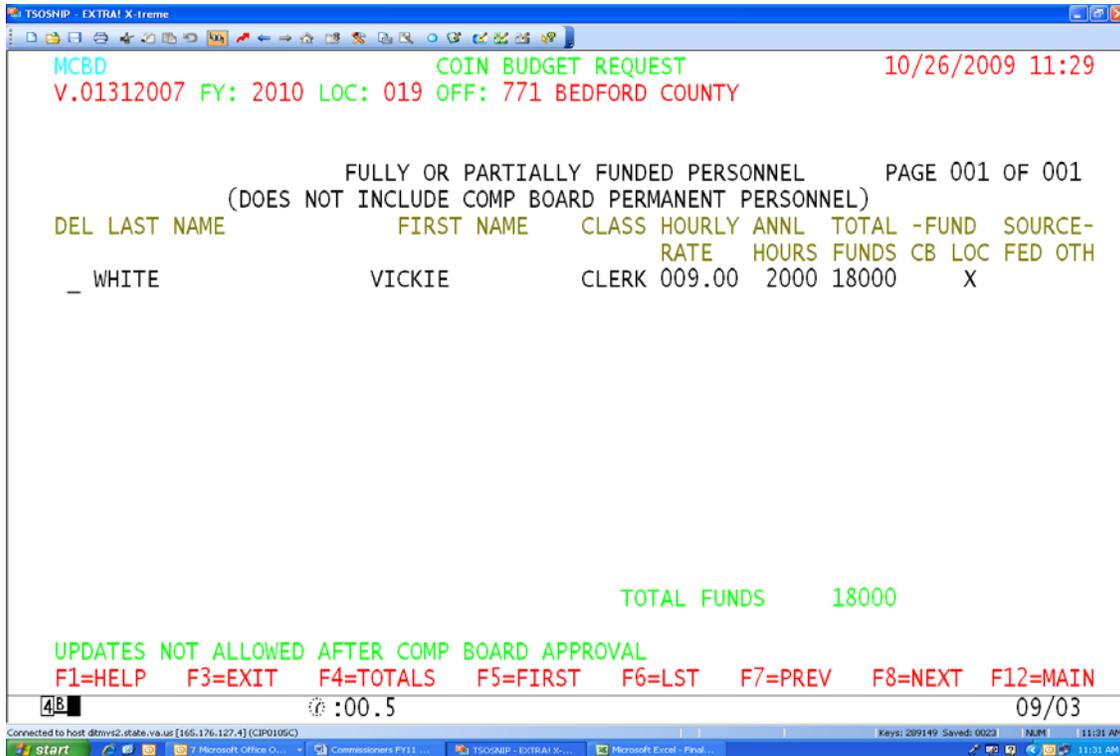
UPDATES NOT ALLOWED AFTER COMP BOARD APPROVAL

F1=HELP F3=EXIT F4=TOTALS F5=FIRST F6=LST F7=PREV F8=NEXT F12=MAIN

4B :00.5 09/03

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CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

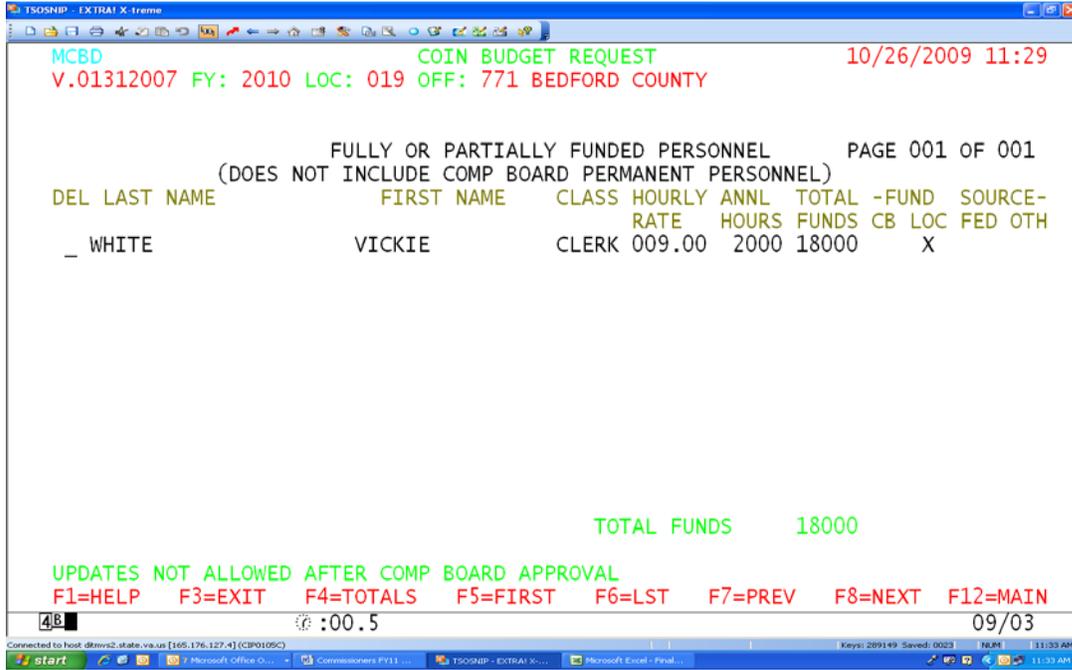


Option #4, Fully Or Partially Funded Positions

Helpful Hints:

- This screen should be used to enter salary information of 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

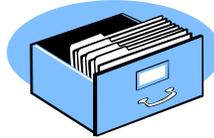
Option #4, Fully Or Partially Funded Positions



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 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:

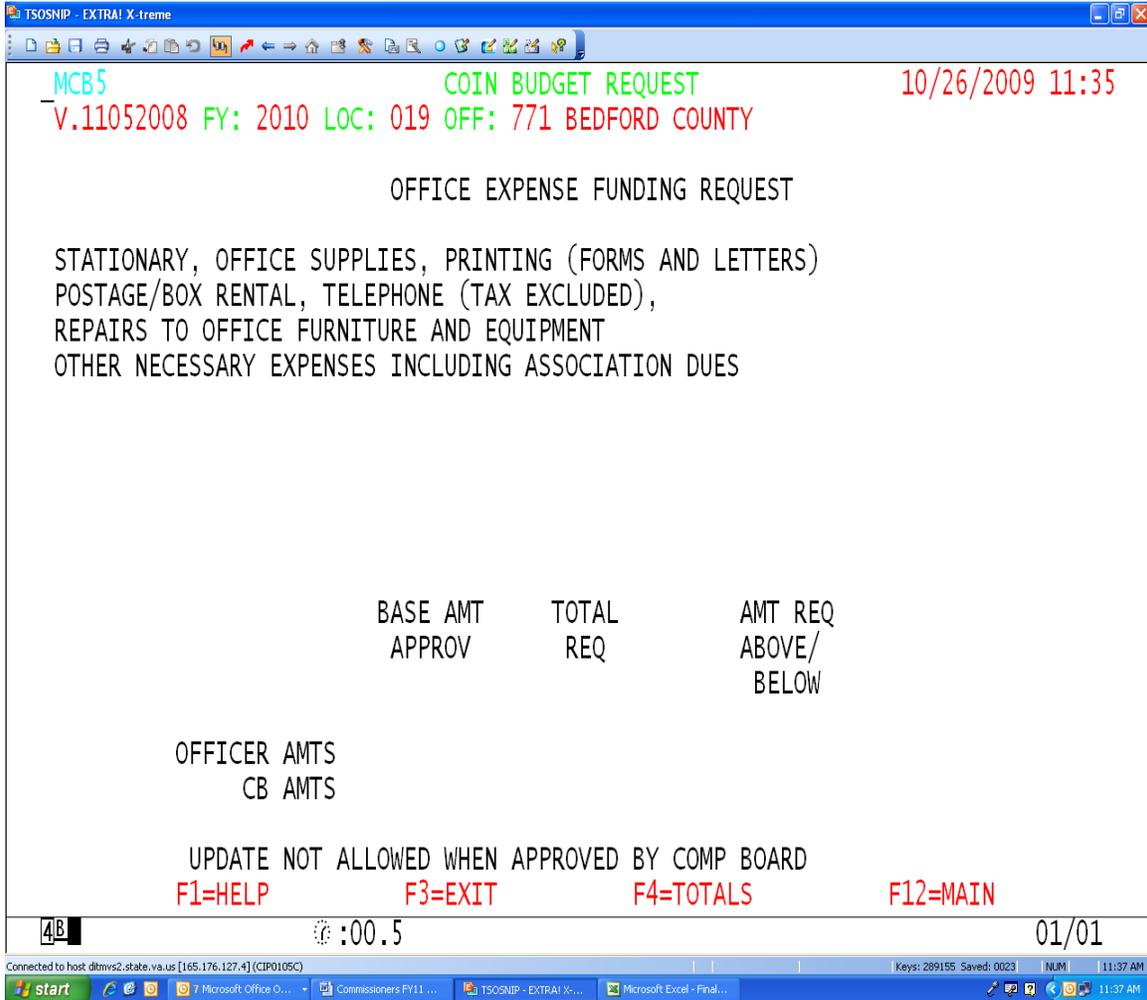
- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #5, Office Expense Funding Request

COMMISSIONERS OF THE REVENUE															
<div style="display: flex; justify-content: space-between; font-size: small;"> MCB5 COIN BUDGET REQUEST 10/26/2009 11:35 </div> <div style="display: flex; justify-content: space-between; font-size: small;"> V.11052008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY </div> <p style="text-align: center; margin: 10px 0;">OFFICE EXPENSE FUNDING REQUEST</p> <p style="font-size: x-small; margin: 5px 0;">STATIONARY, OFFICE SUPPLIES, PRINTING (FORMS AND LETTERS) POSTAGE/BOX RENTAL, TELEPHONE (TAX EXCLUDED), REPAIRS TO OFFICE FURNITURE AND EQUIPMENT OTHER NECESSARY EXPENSES INCLUDING ASSOCIATION DUES</p> <table style="width: 100%; border-collapse: collapse; margin: 10px 0;"> <thead> <tr> <th style="width: 60%;"></th> <th style="width: 20%; text-align: center; font-size: small;">BASE AMT APPROV</th> <th style="width: 10%; text-align: center; font-size: small;">TOTAL REQ</th> <th style="width: 10%; text-align: center; font-size: small;">AMT REQ ABOVE/ BELOW</th> </tr> </thead> <tbody> <tr> <td style="padding: 5px 0 5px 20px;">OFFICER AMTS</td> <td></td> <td></td> <td></td> </tr> <tr> <td style="padding: 5px 0 5px 20px;">CB AMTS</td> <td></td> <td></td> <td></td> </tr> </tbody> </table> <p style="font-size: x-small; margin: 5px 0;">UPDATE NOT ALLOWED WHEN APPROVED BY COMP BOARD</p> <div style="display: flex; justify-content: space-between; font-size: x-small; margin: 5px 0;"> F1=HELP F3=EXIT F4=TOTALS F12=MAIN </div>					BASE AMT APPROV	TOTAL REQ	AMT REQ ABOVE/ BELOW	OFFICER AMTS				CB AMTS			
	BASE AMT APPROV	TOTAL REQ	AMT REQ ABOVE/ BELOW												
OFFICER AMTS															
CB AMTS															
<div style="display: flex; justify-content: space-between; font-size: x-small;"> 48 :00.5 01/01 </div>															

Helpful Hints:

- The total office expenses for the prior year will be displayed as your 'Base Amount Approved'
- This screen allows you to request an increase or decrease to 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:	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 #6, Equipment

Purpose:

The Equipment Request Screen is accessed from the COIN Budget Request menu. Requests for Equipment are made by Category and costs are calculated by quantity.

Navigational Path:

- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #6, Equipment

MCB4 COIN BUDGET REQUEST 10/26/2009 11:37
V.04162008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

EQUIPMENT REQUEST

SEL CATEGORY: A INFO TECHNOLOGY

NEW UNIT	NEW COST	RPL UNIT	RPL COST	TOT QTY	TOTAL COST	STRESSED COST
DESC: COMPUTER		1500	2	3000	2	3,000.00
DESC: MONITOR		1000	2	2000	2	2,000.00
DESC:						

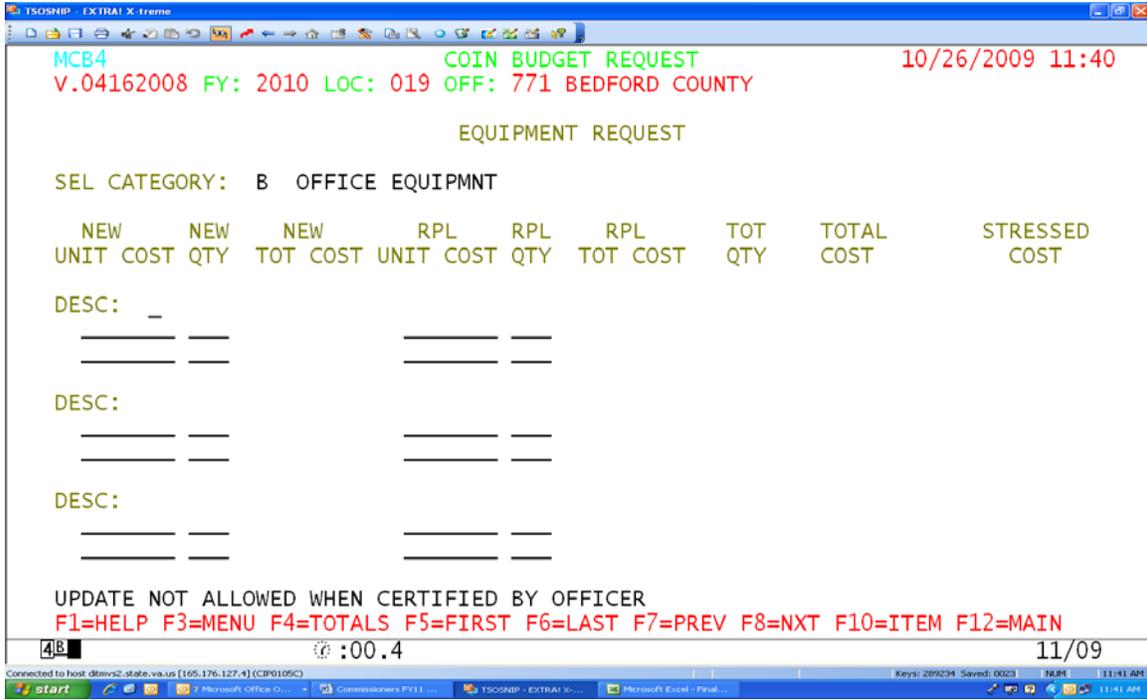
UPDATE NOT ALLOWED WHEN APPROVED BY COMP BOARD
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN

11/09

Helpful Hints:

- The system will calculate the total amount for each equipment item requested and the total amount for all items for your office
- These screens allow the user to request Information Technology (IT) equipment items along with the unit cost and quantity
- NOTE: The Compensation Board may require justification for these items upon review of your budget request.

Option #6 Equipment



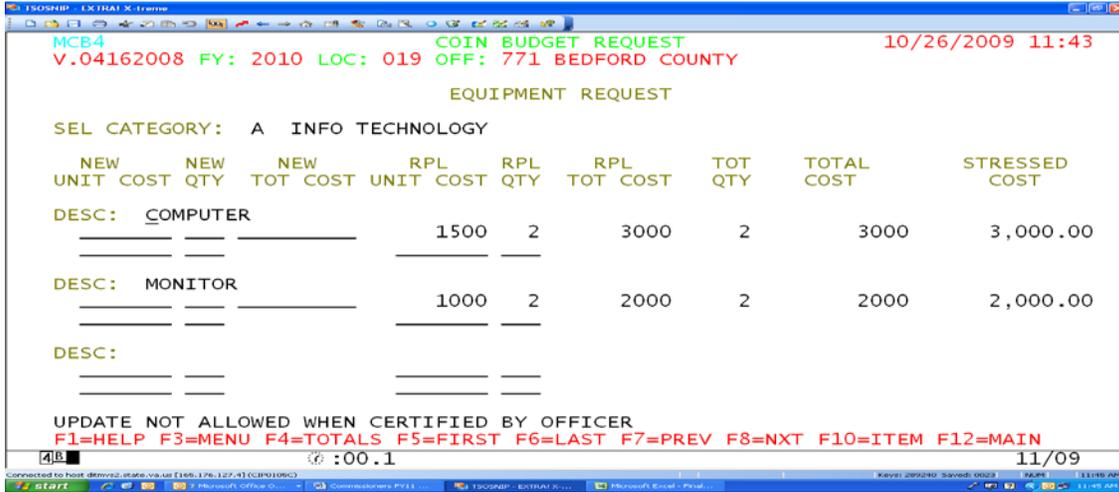
Procedures:

- User will select and input the equipment category they wish to request
 - ✓ Category 'A', IT Equipment
 - ✓ Category 'B', Office Equipment
 - ✓ Category 'C', Furniture
- To proceed to your next equipment category, enter in your next 'SEL CATEGORY'
 - Desc:** List requested equipment or utilize the 'F1' help function
 - New Unit Cost:** Enter unit cost of the new equipment requested
 - New Qty:** Enter the quantity here, if this is New equipment not presently owned
 - New Total Cost:** Calculated
 - RPL Unit Cost:** Enter unit cost of the replacement equipment requested
 - RPL Qty:** Enter the quantity here, if this is Replacement equipment for existing equipment being replaced
 - RPL Total Cost:** Calculated
 - Total Qty:** Calculated (New + Replacement)
 - Total Cost:** Calculated (New + Replacement)
 - Stressed Cost:** Calculated (See Operating Manual)
- Press the "Enter" key after all information has been entered
- Press 'F8= Next' key to proceed to the next screen if additional screens are needed for your equipment request
- Press 'F3 = Exit' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

Option #6, Equipment

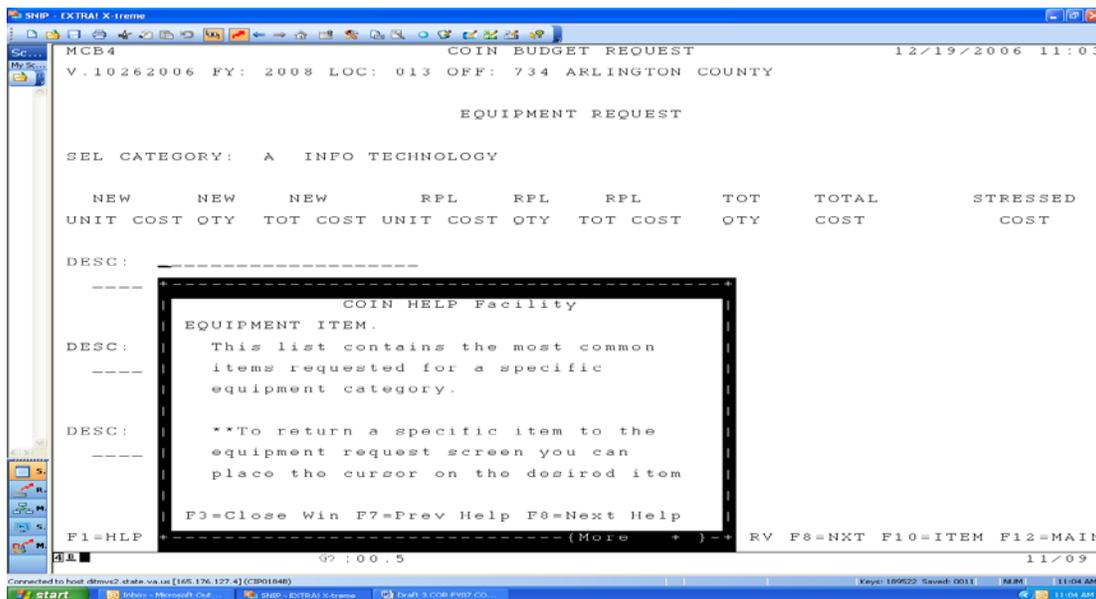
COMMISSONERS OF THE REVENUE

Category A – Information Technology (It) Equipment



Help Pop-Up Screens - Within Alpha Data Fields (Resqportal Only)

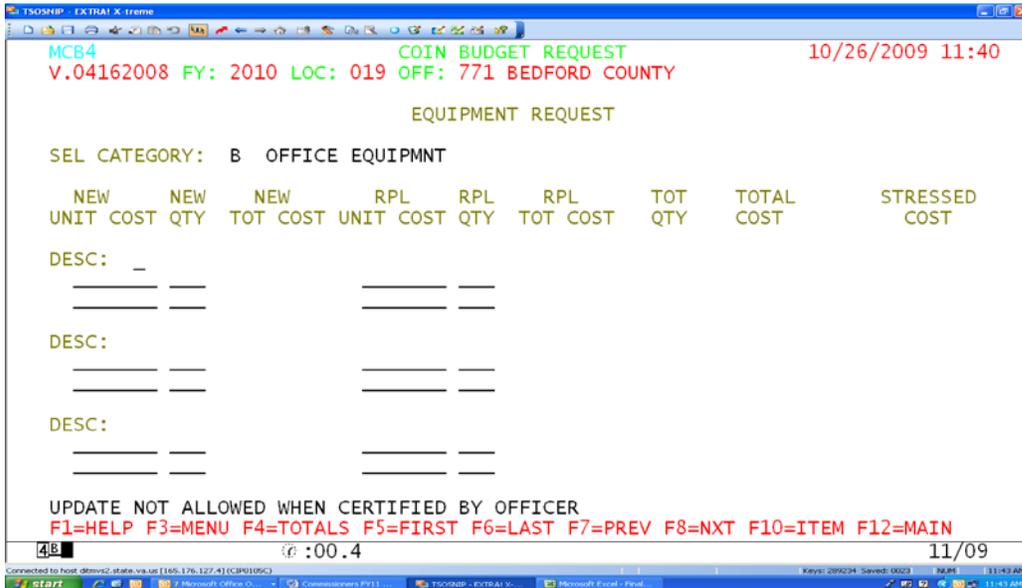
- Utilize **'F1= Help'** in any blank data field if you need help with a COIN data field
- Utilize **'F3 =Exit'** to close the help window
- Utilize **'F7 = Previous'** to move to the previous screen
- Utilize **'F8= Next'** to move to other listed equipment categories
- Utilize **'F17 = Substitute Value'** ('Shift + F5'), to replace a blank field with a selected value within the help screen. Using your arrow keys, place the cursor under the 1st position of your selection and press F17.



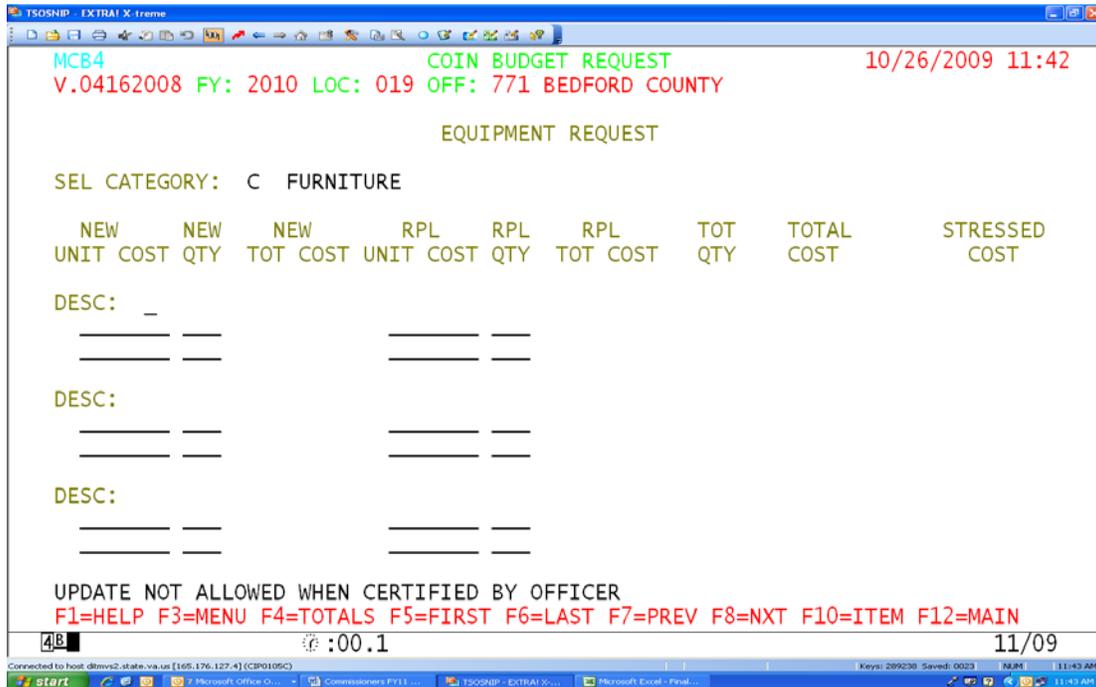
Option #6, Equipment

COMMISSIONERS OF THE REVENUE

Category B – Office Equipment



Category C – Furniture Equipment





9. 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

COMMISSONER's OF THE REVENUE

MCB6 COIN BUDGET REQUEST 10/26/2009 11:45
 V.11052008 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION

SELECT RECORDING FREQUENCY OF WORKLOAD INFORMATION:

1. MONTHLY
 2. QUARTERLY
 3. ANNUALLY

CALENDAR YEAR: 2008

OPTION: =

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

22/10

- In January 201~~4~~³ offices must record one full year of workload data for Calendar Year (CY) 201~~3~~²
 - 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
 - '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 Screens

Screen 1 of 6

RECORD WORKLOAD INFORMATION - ANNUALLY				
CALENDAR YEAR	2007	2008	2009	AVG
ADJUSTMENTS:				
1.A. TAX ASSESSMENTS ADJUSTED	0	728		364
1.B. BUSINESS LICENSE ASSESSMENTS ADJ	0	0		0
1.C. PERSONAL PROPERTY ASSESSMENTS ADJ	8926	8817		8872
1.D. BUSINESS PERS PROP ASSESSMENTS ADJ	0	0		0
1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ	0	0		0
1.F. MACHINERY & TOOLS ASSESSMENTS ADJ	0	0		0
1.G. EXCISE TAX ASSESSMENTS ADJUSTED	0	0		0
1.H. PERSONAL PROPERTY LICENSE FEES ADJUSTE	0	0		0
AUDITS & APPEALS:				
2. TAX RELIEF APPLICATIONS	461	395		428
3. BUSINESS LICENSE DESK AUDITS	0	0		0
4. BUSINESS LICENSE FIELD AUDITS	0	0		0
5. PERSONAL PROPERTY DESK AUDITS	10000	1000		5500
6. PERSONAL PROPERTY FIELD AUDITS	0	0		0
7. MERCHANT'S CAPITAL DESK AUDITS	300	25		163

Adjustments

Definition: An adjustment is the act of processing an increase or decrease in the original assessed amount.

1. **A. NUMBER OF REAL ESTATE TAX ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits **and may include the application of tax relief, tax credits, or land use programs.**
- B. NUMBER OF BUSINESS LICENSE ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any **increase or decrease in the original license fee based on discovery of gross receipts; or in the case of wholesalers, gross purchases. Adjustments may be made after discovery of new receipts, i.e. Schedule C; audits, which require additional information to be provided by the entity; and self-reporting errors.**
- C. NUMBER OF PERSONAL PROPERTY ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits. **This does not include adjustments that were made to the personal property records prior to generation of the final Personal Property Book.**
- D. NUMBER OF BUSINESS PERSONAL PROPERTY ASSESSMENTS ADJUSTED:** : Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **An audit must include the requisition of additional information from the business that results in discovery of new property or an error in the original reporting.**
- E. NUMBER OF MERCHANT'S CAPITAL ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **An audit must include the requisition of additional information from the business that results in discovery of new capital or an error in the original reporting.**
- F. NUMBER OF MACHINERY & TOOLS ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **An audit must include the requisition of additional information from the business that results in discovery of new machinery and tools or an error in the original reporting.**
- G. NUMBER OF EXCISE TAX ASSESSMENTS ADJUSTED:** Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits. **This should include audits that apply to meals, lodging, admissions, short term rental, cigarettes and any other local excise taxes assessed.**
- H. NUMBER OF LICENSE FEES ADJUSTED:** Enter the of license fees adjusted by your office as a result of **proration or disposal of a vehicle.**

Audits & Appeals

Definition: Auditing is a systematic process of objectively obtaining and evaluating evidence regarding assertions about economic actions and events to ascertain the degree of correspondence between the assertions and established criteria. For purpose of the following section, the COR or Deputy must summons additional information in writing and compare the new information to that which was originally reported.

CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

2. **NUMBER OF APPLICATIONS RECEIVED FOR TAX RELIEF, REAL ESTATE, PERSONAL PROPERTY, DISABLED, ETC.:** : Enter the total of the applications received in your office annually. Do not multiply this figure by any factor if you prorate or bill more than once a year. Do not duplicate any numbers included in adjustments under section 1.
3. **NUMBER OF BUSINESS LICENSE DESK AUDITS:** Enter the total number of desk audits completed on business license accounts annually. A desk audit must follow the above stated definition. This does not include regular processing of license applications and renewals. Enter the number of new taxpayers identified through discovery i.e. Schedule C, annually.

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:47
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY
CALENDAR YEAR 2007 2008 2009 AVG

ADJUSTMENTS:

1.A. TAX ASSESSMENTS ADJUSTED	0	728	_____	364
1.B. BUSINESS LICENSE ASSESSMENTS ADJ	0	0	_____	0
1.C. PERSONAL PROPERTY ASSESSMENTS ADJ	8926	8817	_____	8872
1.D. BUSINESS PERS PROP ASSESSMENTS ADJ	0	0	_____	0
1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ	0	0	_____	0
1.F. MACHINERY & TOOLS ASSESSMENTS ADJ	0	0	_____	0
1.G. EXCISE TAX ASSESSMENTS ADJUSTED	0	0	_____	0
1.H. PERSONAL PROPERTY LICENSE FEES ADJUSTE		0	_____	0
AUDITS & APPEALS:				
2. TAX RELIEF APPLICATIONS	461	395	_____	428
3. BUSINESS LICENSE DESK AUDITS	0	0	_____	0
4. BUSINESS LICENSE FIELD AUDITS	0	0	_____	0
5. PERSONAL PROPERTY DESK AUDITS	10000	1000	_____	5500
6. PERSONAL PROPERTY FIELD AUDITS	0	0	_____	0
7. MERCHANT'S CAPITAL DESK AUDITS	300	25	_____	163

F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN
:00.1 08/63

4. **NUMBER OF BUSINESS LICENSE FIELD AUDITS:** Enter the total number of field audits completed on business license accounts annually. A field audit requires a visit to the physical location of the business. Enter the number of new taxpayers identified through field discovery annually.
5. **NUMBER OF PERSONAL PROPERTY DESK AUDITS:** Enter the total number of desk audits completed on personal property accounts annually. A desk audit must follow the above stated definition. Enter the number of new taxpayers identified through discovery annually. Do not include motor vehicle record adds or deletes transferred from DMV.
6. **NUMBER OF PERSONAL PROPERTY FIELD AUDITS:** Enter the total number of field audits completed on personal property accounts annually. A field audit requires a visit to the physical location of the property. Enter the number of new taxpayers identified through field discovery annually.
7. **NUMBER OF MERCHANT'S CAPITAL DESK AUDITS:** : Enter the total number of desk audits completed on merchant's capital accounts annually. A desk audit must follow the above stated definition. Enter the number of new taxpayers identified through discovery annually.

**Option #7, Record Workload Information
Option #3 Annual Screens**

Screen 2 of 6

RECORD WORKLOAD INFORMATION	2007	2008	2009	AVG
8. MERCHANT'S CAPITAL FIELD AUDITS	0	0	_____	0
9. BUSINESS PERSONAL PROPERTY DESK AUDITS	3500	1000	_____	2250
10. BUSINESS PERSONAL PROPERTY FIELD AUDITS	225	200	_____	213
11. MACHINERY & TOOLS DESK AUDITS	60	10	_____	35
12. MACHINERY & TOOLS FIELD AUDITS	0	0	_____	0
13. EXCISE TAX DESK AUDITS	25	50	_____	38
14. EXCISE TAX FIELD AUDITS	0	0	_____	0
15. LOCAL BUSINESS LICENSE APPEALS	0	0	_____	0
16. STATE BUSINESS LICENSE APPEALS	0	0	_____	0
17. LOCAL MERCHANT'S CAPITAL APPEALS	0	0	_____	0
18. MERCHANT'S CAPITAL STATE APPEALS	0	0	_____	0
19. LOCAL BUSINESS PERSONAL PROPERTY APPEALS	120	50	_____	85
20. STATE BUSINESS PERSONAL PROPERTY APPEALS	0	0	_____	0
21. LOCAL MACHINERY & TOOLS APPEALS	0	0	_____	0
22. STATE MACHINERY & TOOLS APPEALS	0	0	_____	0
23. LOCAL EXCISE TAX APPEALS	0	0	_____	0

8. **NUMBER OF MERCHANT'S CAPITAL FIELD AUDITS:** Enter the total number of field audits completed on merchant's capital accounts annually. *A field audit requires a visit to the physical location of the business.* Enter the number of new taxpayers identified through field discovery annually.
9. **NUMBER OF BUSINESS PERSONAL PROPERTY DESK AUDITS:** Enter the total number of desk audits completed on business personal property annually. *A desk audit must follow the above stated definition.* Enter the number of new taxpayers identified through discovery annually.
10. **NUMBER OF BUSINESS PERSONAL PROPERTY FIELD AUDITS:** Enter the total number of field audits completed on business personal property annually. *A field audit requires a visit to the physical location of the property.* Enter the number of new taxpayers identified through discovery annually.
11. **NUMBER OF MACHINERY & TOOLS DESK AUDITS:** Enter the total number of desk audits completed on machinery & tools annually. *A desk audit must follow the above stated definition.* Enter the number of new taxpayers identified through discovery annually.
12. **NUMBER OF MACHINERY & TOOLS FIELD AUDITS:** Enter the total number of field audits completed on machinery & tools annually. *A field audit requires a visit to the physical location of the business.* Enter the number of new taxpayers identified through field discovery annually.
13. **NUMBER OF EXCISE TAX DESK AUDITS:** Enter the total number of desk audits completed on excise tax accounts annually. *A desk audit must follow the above stated definition.* Enter the number of new taxpayers identified through discovery annually.
14. **NUMBER OF EXCISE FIELD AUDITS:** Enter the total number of field audits completed on excise tax accounts annually. *A field audit requires a visit to the physical location of the business.* Enter the number of new taxpayers identified through field discovery annually.
15. **NUMBER OF LOCAL BUSINESS LICENSE APPEALS:** Enter the total number of written tax appeals filed locally for business license tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
16. **NUMBER OF STATE BUSINESS LICENSE APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for business license tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
17. **NUMBER OF LOCAL MERCHANT'S CAPITAL APPEALS:** Enter the total number of written tax appeals filed locally for merchant's capital tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
18. **NUMBER OF MERCHANT'S CAPITAL STATE APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for merchant's capital tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
19. **NUMBER OF LOCAL BUSINESS PERSONAL PROPERTY APPEALS:** Enter the total number of written tax appeals filed locally or business personal property tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
20. **NUMBER OF STATE BUSINESS PERSONAL PROPERTY APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for business personal property tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
21. **NUMBER OF LOCAL MACHINERY & TOOLS APPEALS:** Enter the total number of written tax appeals filed locally for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
22. **NUMBER OF STATE MACHINERY & TOOLS APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
23. **NUMBER OF LOCAL EXCISE TAX APPEALS:** Enter the total number of written tax appeals filed locally for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).

Option #7, Record Workload Information

Option #3 Annual Screens

Screen 3 of 6

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:50
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY	2007	2008	2009	AVG
24. STATE EXCISE TAX APPEALS	0	0	_____	0
25. LOCAL REAL ESTATE TAX APPEALS	400	150	_____	275
26. STATE REAL ESTATE TAX APPEALS	0	0	_____	0
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:				
27. BUSINESS LIC/CAPITAL ACCTS	594	581	_____	588
28. LAND USE TAX/ROLLBACK APPL	5900	5900	_____	5900
29. EXCISE TAXES/BUSINESS ASSESSED	179	221	_____	200
30.A. FINANCIAL INSTITUTIONS IN YOUR LOC	0	10	_____	5
30.B. FINANCIAL INST/BANK FRANCHISE TAX	4	1	_____	3
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS	4	4	_____	4
GENERAL ADMINISTRATIVE & LEGAL:				
32. GENERAL ADMINISTRATIVE DUTIES	0	250	_____	125
33. SUMMONS	5	0	_____	3
34. CRIMINAL FAILURE TO FILE COMPLAINTS	0	0	_____	0
35. WORKMAN'S COMPENSATION AFFIDAVITS	0	0	_____	0
36. PILOT PROGRAMS	0	0	_____	0

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F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN
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- 24. **NUMBER OF STATE EXCISE TAX APPEALS:** Enter the total number of written tax appeals filed with the State Tax Commissioner for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).
- 25. **NUMBER OF REAL ESTATE TAX APPEALS:** Enter the total number of written tax appeals filed locally for real estate tax (see Va. Code § 58.1- 3350, 58.1-3351 & 58.1-3380).
- 26. **NUMBER OF REAL ESTATE TAX APPEALS:** Enter the total number of written tax appeals filed with the Circuit Court for real estate tax (see Va. Code § 58.1- 3382).

Business Licenses, Merchants Capital & Excise

- 27. **NUMBER OF BUSINESS LICENSES ISSUED AND MERCHANTS CAPITAL ACCOUNTS:** Enter the total number of all business licenses processed annually. **Do not multiply this number by any factor if you bill multiple times per year.** For those localities with merchant's capital, report the total number of accounts.
- 28. **NUMBER OF APPLICATIONS PROCESSED FOR LAND USE TAXATION AND ROLLBACK ASSESSMENTS:** Enter the total number of land use and rollback applications processed. **This may be moved to the real estate section in future years.**
- 29. **NUMBER OF BUSINESS ACCOUNTS ASSESSED FOR EXCISE TAXES:** Enter the total number of business accounts. This should include meals, lodging, admissions, short term rental, *right-of-way*, *911*, *utility tax*, *consumption tax (including telephone and mobile phone tax)*, *cigarettes* and any other local excise taxes assessed. **Do not** multiply this number by the number of processings during a year, i.e., **Do not** multiply by twelve for monthly processings or by four for quarterly processings.
- 30. **A. NUMBER OF FINANCIAL INSTITUTIONS IN YOUR LOCALITY.** Enter the total number of financial institutions that are in your locality.
B. NUMBER OF FINANCIAL INSTITUTIONS WITH THEIR MAIN OFFICE IN YOUR LOCALITY THAT ARE REQUIRED TO FILE THE BANK FRANCHISE TAX WITH YOUR OFFICE: Enter the total number of banks that file returns with your office that can be verified with the Department of Taxation.
- 31. **NUMBER OF COAL/GAS SEVERANCE TAX, COAL ROAD TAX, OIL SEVERANCE TAX AND MINERAL TAX ACCOUNTS:** If your office handles these functions, enter the number of Coal/Gas Severance, Coal Road, Oil Severance and mineral taxes accounts. **Do not** multiply this figure by any factor if billed more than once a year.

CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

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MCBH-F COIN BUDGET REQUEST 10/26/2009 11:50
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
24. STATE EXCISE TAX APPEALS	0	0	_____	0
25. LOCAL REAL ESTATE TAX APPEALS	400	150	_____	275
26. STATE REAL ESTATE TAX APPEALS	0	0	_____	0
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:				
27. BUSINESS LIC/CAPITAL ACCTS	594	581	_____	588
28. LAND USE TAX/ROLLBACK APPL	5900	5900	_____	5900
29. EXCISE TAXES/BUSINESS ASSESSED	179	221	_____	200
30.A. FINANCIAL INSTITUTIONS IN YOUR LOC	0	10	_____	5
30.B. FINANCIAL INST/BANK FRANCHISE TAX	4	1	_____	3
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS	4	4	_____	4
GENERAL ADMINISTRATIVE & LEGAL:				
32. GENERAL ADMINISTRATIVE DUTIES	0	250	_____	125
33. SUMMONS	5	0	_____	3
34. CRIMINAL FAILURE TO FILE COMPLAINTS	0	0	_____	0
35. WORKMAN'S COMPENSATION AFFIDAVITS	0	0	_____	0
36. PILOT PROGRAMS	0	0	_____	0

I0048 RECORD UPDATED SUCCESSFULLY
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN 07/63

Microsoft Office Word 2003

General Administrative & Legal

- 32. **GENERAL ADMINISTRATIVE DUTIES:** Enter the total number of opinions rendered and tax accounts reviewed (i.e. following review the Code of Virginia, AG's Opinion's, DOT Guidelines). **Do Not** include formal appeals (see Number of Appeals); Enter number annual surveys completed, general information requests (including FOIA requests). Enter number of personnel reviews conducted. Enter the total number of "Sales Tax Ads & Deletes" reviewed. **Do Not** add new businesses or merchants capital. (see current workload measure #8 Number of Business Licenses Issued and Merchants Capital Accounts.) **Enter number of requests by stakeholders, such as business listings, realtor listings, new business listings, etc. Do not include requests for directions, office hours, and the like.**
- 33. **NUMBER OF SUMMONS:** Enter the total number of summons issued annually (see Va. Code § 58.1-3110.)
- 34. **NUMBER OF CRIMINAL FAILURE TO FILE COMPLAINTS:** Enter the total number of criminal failure to file complaints issued annually (see § 58.13916.1).
- 35. **NUMBER OF WORKMAN'S COMPENSATION AFFIDAVITS:** Enter the total number of Workmen's Compensation Affidavits processed annually.
- 36. **NUMBER OF PILOT PROGRAMS:** Enter the total number of State sponsored "pilot" programs in which you are participating.

**Option #7, Record Workload Information
Option #3 Annual Screens**

Screen 4 of 6

RECORD WORKLOAD INFORMATION - ANNUALLY				
CALENDAR YEAR	2007	2008	2009	AVG
INCOME TAX:				
37. STATE TAX RETURNS PROCESSED	9085	9261	_____	9173
38. ESTIMATED STATE TAX ASSESSMENTS	1593	1655	_____	1624
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX	1000	1000	_____	1000
40. STATE TAX RETURNS PREPARED	40	200	_____	120
PERSONAL PROPERTY AND MACHINERY & TOOLS:				
41. PERSONAL PROPERTY ASSESSMENTS	123489	120838	_____	122164
42. PERSONAL PROPERTY REGISTRATION RENEWALS	59165	59244	_____	59205
43. PERSONAL PROPERTY NEW REGISTRATIONS	26510	23917	_____	25214
44. PERSONAL PROPERTY REGISTRATION DELETIONS	25254	19222	_____	22238
45. PERSONAL PROPERTY PRORATION ASSESSMENTS	51640	43078	_____	47359
46.A. PPTRA COMPLIANCE	85852	82830	_____	84341
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN	3700	3500	_____	3600
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL	0	0	_____	0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL	0	0	_____	0
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS	0	0	_____	0
I0048 RECORD UPDATED SUCCESSFULLY				
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN				

Income Tax

- 37. **NUMBER OF STATE INCOME TAX RETURNS PROCESSED BY YOUR OFFICE:** Enter the total number that can be verified by the Department of Taxation. **Do not** include tax returns prepared by your office. They will be counted under item #40 in the proposed new workload definitions.
- 38. **NUMBER OF STATE TAX ASSESSMENTS FOR ANNUAL ESTIMATED INCOME TAXPAYERS:** Enter the total number that can be verified by the Department of Taxation.
- 39. **NUMBER OF TAXPAYERS ASSISTED WITH STATE INCOME TAX:** Enter the total number of taxpayers assisted with State Income Tax related questions. Include telephone and walk-in inquiries that can be verified by a daily log.
- 40. **NUMBER OF STATE TAX RETURNS PREPARED:** Enter the total number of tax returns your office actually prepared for taxpayers. Do not include returns processed (this is counted in Old Definition #37) **Include all ifile returns.**

Personal Property & Machinery and Tools

- 41. **NUMBER OF PERSONAL PROPERTY ASSESSMENTS:** Enter the total number of items of the following kinds of personal property assessments in your jurisdiction: count each separate motor vehicle, motorcycle, utility, road or boat trailer, boat and motors, camper, travel trailer, aircraft, motor homes, etc. Each item is a separate count. **Do not** multiply this factor by any factor if you prorate or bill more than once a year.
- 42. **NUMBER OF PERSONAL PROPERTY REGISTRATION RENEWALS:** If your office serves as the point of registration for personal property, enter the number of the following kinds of property registration renewals in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **This number would include renewals requiring interaction with your office via mail or other confirmation. Include decals or registration fees if sold or assessed by your office. This does not include automatic downloads or rollovers.**
- 43. **NUMBER OF PERSONAL PROPERTY NEW REGISTRATIONS:** If your office serves as the point of registration for personal property, enter the total number of the following kinds of property new registrations in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **Requires interaction with your office by mail, phone or in person. Do not include registrations added automatically through a download.**
- 44. **NUMBER OF PERSONAL PROPERTY REGISTRATION DELETIONS:** If your office serves as the point of registration for personal property, enter the total number of the following kinds of property registrations that were deleted in your jurisdiction: count each separate motor vehicle, motorcycle, road or boat trailer, boat, camper, travel trailer, aircraft, and motor home. Each item is a separate count. **Requires interaction with your office by mail, phone or in person. Do not include registrations added automatically through a download.**
- 45. **NUMBER OF PERSONAL PROPERTY PRORATION ASSESSMENTS:** If your office prorates personal property enter the total number of vehicles assessed for personal property on a monthly prorated basis. **Include only those bought, sold, moved in or moved out.**
- 46. **A. NUMBER OF PERSONAL PROPERTY TAX RELIEF ACT (PPTRA) COMPLIANCE:** Enter the total number of assessments subject to PPTRA compliance audit. **This should equal the total number of vehicles in your locality that were qualified. Do Not** include vehicles adjusted (see current workload definition "Number of Tax Assessments Adjusted..." and proposed workload definition "Number of Personal Property Registrations").
B. NUMBER OF PERSONAL PROPERTY TAX ACCOUNTS REVIEWED FOR PPTRA COMPLIANCE: Enter the total number of personal property tax accounts reviewed for PPTRA compliance (i.e. Schedule "C's", business trade name registrations, etc.). **Do Not** include vehicles adjusted (see current workload definition "Number of Tax Assessments Adjusted..." and proposed workload definition "Number of Personal Property Registrations").

Option #7, Record Workload Information

Option #3 Annual Screens

MCBH-F COIN BUDGET REQUEST 10/26/2009 11:51
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - ANNUALLY

CALENDAR YEAR	2007	2008	2009	AVG
INCOME TAX:				
37. STATE TAX RETURNS PROCESSED	9085	9261	_____	9173
38. ESTIMATED STATE TAX ASSESSMENTS	1593	1655	_____	1624
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX	1000	1000	_____	1000
40. STATE TAX RETURNS PREPARED	40	200	_____	120
PERSONAL PROPERTY AND MACHINERY & TOOLS:				
41. PERSONAL PROPERTY ASSESSMENTS	123489	120838	_____	122164
42. PERSONAL PROPERTY REGISTRATION RENEWALS	59165	59244	_____	59205
43. PERSONAL PROPERTY NEW REGISTRATIONS	26510	23917	_____	25214
44. PERSONAL PROPERTY REGISTRATION DELETIONS	25254	19222	_____	22238
45. PERSONAL PROPERTY PRORATION ASSESSMENTS	51640	43078	_____	47359
46.A. PPTRA COMPLIANCE	85852	82830	_____	84341
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN	3700	3500	_____	3600
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL	0		_____	0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL		0	_____	0
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS	0	0	_____	0
I0048 RECORD UPDATED SUCCESSFULLY				
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN				

4B :00.1 08/63

- 47. **NO DATA RECORDED**
- 48. **NUMBER OF QUALIFYING VEHICLE ASSESSMENTS REVIEWED IN ORDER TO DETERMINE THE PERCENTAGE OF PERSONAL PROPERTY RELIEF OFFERED TO TAXPAYERS**
- 49. **NUMBER OF MOTOR VEHICLE "NO FEE" DECALS ISSUED (EX., MILITARY PERSONNEL OR OWNERSHIP TRANSFERS).**

**Option #7, Record Workload Information
Option #3 Annual Screens**

Screen 5 of 6

RECORD WORKLOAD INFORMATION - ANNUALLY		2007	2008	2009	AVG
50.A.	MOTOR VEHICLE LICENSE DECALS SOLD	0	0	_____	0
50.B.	MOTOR VEHICLE LICENSE FEES ASSESSED		0	_____	0
51.	PUBLIC SERVICE CORP ASSESSED	28	28	_____	28
52.	ACCTS (MACHINERY/TOOL/PERS PROP/FARM)	5051	5177	_____	5114
53.	MOBILE HOME ASSESSMENTS	3628	3585	_____	3607
REAL ESTATE:					
54.A.	PARCELS OF LAND	44187	45076	_____	44632
54.B.(1)	REAL ESTATE ASSESSMENTS IN-HOUSE	0	0	_____	0
54.B.(2)	REAL ESTATE ASSESSED CONTRACT BASIS	44187	0	_____	22094
54.C.	MAPPING CHGES OR GIS UPDTS COMPLETE	1074	1013	_____	1044
54.D.	REAL ESTATE TRANSFERS	4117	3394	_____	3756
54.E.	REASSESSMENTS/NEW CONSTRUCTION	2144	466	_____	1305
DMV LICENSING AGENCY:					
55.	NUMBER OF TITLES PROCESSED FOR DMV	0	0	_____	0
56.	NUM OF TRANS W/FEES COLLECTED FOR DMV	0	0	_____	0

I0048 RECORD UPDATED SUCCESSFULLY
F1=HELP F3=MENU F7=PRV F8=NXT F12=MAIN
:00.1 07/63

50. A. NUMBER OF MOTOR VEHICLE LICENSE DECALS SOLD.

50.b. NUMBER OF MOTER VEHICLE LICENSE FEES ASSESSED

- 51. **NUMBER OF PUBLIC SERVICE CORPORATIONS THAT ARE ASSESSED:** Enter the number of Public Service Corporations and Railroad companies that are assessed and that can be verified with the State Corporations Commission and the Department of Taxation.
- 52. **NUMBER OF MACHINERY AND TOOLS, BUSINESS PERSONAL PROPERTY AND FARM ACCOUNTS:** Enter the total number of manufacturing machinery and tools, business personal property and farm accounts that you assess. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.
- 53. **NUMBER OF MOBILE HOME ASSESSMENTS:** Enter the total number of mobile homes that you treat as personal property. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.

Real Estate

- 54. **A. NUMBER OF PARCELS OF LAND:** If your office assesses real estate, enter the total number of parcels of real estate, taxable and non taxable. **Do not** multiply this figure by any factor if you prorate or bill more than once a year.
 - B. (1) NUMBER OF REAL ESTATE ASSESSMENTS CONDUCTED IN-HOUSE ANNUALLY DURING YOUR LOCALITY'S GENERAL REASSESSMENT:** If your office oversees the real estate assessment and conducts the general reassessment enter the number of real estate parcels assessed annually from the Assessor's General Reassessment Workload Achievement Log. (If you complete more than one log i.e. mineral accounts, land use accounts and land parcels, add the total for all logs and enter.)
 - (2) NUMBER OF REAL ESTATE PARCELS ASSESSED ON A CONTRACT BASIS DURING YOUR LOCALITY'S GENERAL REASSESSMENT:** If your office hires an independent appraiser to assess real estate for your general reassessment enter the number of real estate parcels assessed.
 - C. NUMBER OF MAPPING CHANGES OR GIS UPDATES COMPLETED.**
 - D. NUMBER OF REAL ESTATE TRANSFERS:** If your office handles real estate, enter the total number of transfers of parcels for the year.
 - E. NUMBER OF REASSESSMENTS DUE TO NEW CONSTRUCTION:** If your office assesses new construction, enter the total number of assessments adjusted due to new construction. **Do not** enter the total number of building permits. **Do not** enter the number of visits to a property for measurements and listings.

DMV Licensing Agency

- 55. **NUMBER OF TITLES PROCESSED FOR DMV AS A DMV LICENSING AGENT:** If your office serves as a DMV Licensing Agent, enter the 1) total number of vehicle titles, (original, substitute and replacement including title maintenance or change of title information); 2) vehicle registration (original, renewal, transfer, re-issue or surrender) transactions; 3) special and personalized license plate requests processed; 4) Driver Transcript Record requests processed. Each item (titles, registrations, plate requests, transcripts) is a separate count.
- 56. **TOTAL NUMBER OF TRANSACTIONS WHERE FEES ARE COLLECTED FOR DMV AS A DMV LICENSING AGENT**

Option #7, Record Workload Information

Option #3 Annual Screens

Screen 6 of 6

MCBI-A COIN BUDGET REQUEST 10/26/2009 11:53
 V.12102008 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

RECORD WORKLOAD INFORMATION - FTE TOTALS
 APRIL (BEFORE ALLOCATIONS)

TOTAL FULL TIME	BUDGET REDUCTION FTE	FTE TOTAL	FTE REQUIRED	FTE DIFFERENCE	WEIGHTED
0	0.00	0.00	7.95	7.95	13746.52

NEED PERCENT REQUEST NEW
 0

F1=HELP F2=AUTH BUDGET F3=MENU F4=TOTALS F7=PREV F12=MAIN
 4B :01.9 01/01

This screen shows the following information based on the data enter 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

Commissioner's Workload Elements		Weighted Factor
Adjustments:		
1A	Number of Real Estate Tax Assessments Adjusted	0.37
1B	Number of Business License Assessments Adjusted	0.44
1C	Number of Personal Property Assessments Adjusted	0.08
1D	Number of Business Personal Property Assessments Adjusted	0.50
1E	Number of Merchant's Capital Assessments Adjusted	0.31
1F	Number of Machinery & Tools Assessments Adjusted	0.83
1G	Number of Excise Tax Assessments Adjusted	0.66
1H	Number of Personal Property License Fees Adjusted	0.00
Audits & Appeals:		
2	Number of applications received for tax relief, real estate, personal property, disabled, etc.	0.30
3	Number of business license desk audits	0.51
4	Number of business license field audits	1.58
5	Number of personal property desk audits	0.05
6	Number of personal property field audits	0.74
7	Number of merchant's capital desk audits	0.13
8	Number of merchant's capital field audits	0.98
9	Number of business personal property desk audits	0.29
10	Number of business personal property field audits	6.93
11	Number of machinery & tools desk audits	0.90
12	Number of machinery & tools field audits	6.34
13	Number of excise tax desk audits	0.75
14	Number of excise tax field audits	5.03
15	Number of local business license appeals	7.19
16	Number of state business license appeals	22.19
17	Number of local merchant's capital appeals	0.76
18	Number of merchant's capital state appeals	1.43
19	Number of local business personal property appeals	1.73
20	Number of state business personal property appeals	0.19
21	Number of local machinery & tools appeals	4.96
22	Number of state machinery & tools appeals	0.19
23	Number of local excise tax appeals	26.95
Commissioner's Workload Elements		Weighted Factor
24	Number of state excise tax appeals	0.19
25	Number of local real estate tax appeals	0.63
26	Number of state real estate tax appeals	1.30
Business Licenses, Merchants Capital & Excise:		
27	Number of Business Licenses Issued and Merchants Capital Accounts	0.27
28	Number of Applications Processed for Land Use Taxation and Rollback Assessments	0.21

CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

29	Number of Business Accounts Assessed for Excise Taxes	0.68
30A	Number of Financial Institutions in Your Locality	0.98
30B	Number of Financial Institutions with their main office in your locality that are required to file the bank franchise tax with your office	1.74
31	Number of coal/gas severance tax, coal road tax, oil severance tax and mineral tax accounts	0.25
General Administrative & Legal:		
32	General administrative duties	0.00
33	Number of summons	0.00
34	Number of criminal failure to file complaints	0.00
35	Number of workman's compensation affidavits	0.06
36	Number of pilot programs	0.00
Income Tax:		
37	Number of state income tax returns processed by your office	0.12
38	Number of state tax assessments for annual estimated income taxpayers	0.15
39	Number of taxpayers assisted with state income tax	0.18
40	Number of state tax returns prepared	0.40
Personal Property and Machinery & Tools:		
41	Number of personal property Assessments	0.03
42	Number of personal property registration renewals	0.02
43	Number of personal property new registrations	0.06
44	Number of personal property registration deletions	0.03
45	Number of personal property proration assessments	0.00
46A	Number of personal property tax relief act (PPTRA) compliance	0.01
46B	Number of personal property tax accounts reviewed for PPTRA compliance	0.04
47	Number of personal property vehicles researched for the DMV PPTRA duplication report	0.20
48	Number of motor vehicle records reviewed for personal property tax relief qualification	0.00
49	Number of motor vehicle "no fee" decals issued (ex. Military personnel or ownership transfers)	0.00
50A	Number of motor vehicle license decals sold	0.00
50B	Number of motor vehicle license fees assessed	0.00
51	Number of public service corporations that are assessed	0.65
52	Number of machinery and tools, business personal property and farm accounts	0.15
53	Number of mobile home assessments	0.08
Real Estate:		
54A	Number of parcels of land	0.03
Commissioner's Workload Elements		Weighted Factor
54B1	Number of real estate assessments conducted in-house annually during your locality's general assessment	0.06

CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE

54B2	Number of real estate parcels assessed on a contract basis during your localities general assessment	0.01
54C	Number of mapping changes or GIS updates completed	0.35
54D	Number of real estate transfers	0.41
54E	Number of reassessments due to new construction	0.90
DMV Licensing Agency:		
55	Number of titles processed for DMV	0.25
56	Total number of transactions for which fees are collected for DMV	0.07

Staffing Need =	$y = 1.3074 + 0.0005x + -2e-9x^{1.95}$
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Option #7, Record Workload Information

Beginning February 1 offices can begin recording workload data monthly, quarterly or annually for CY 2014

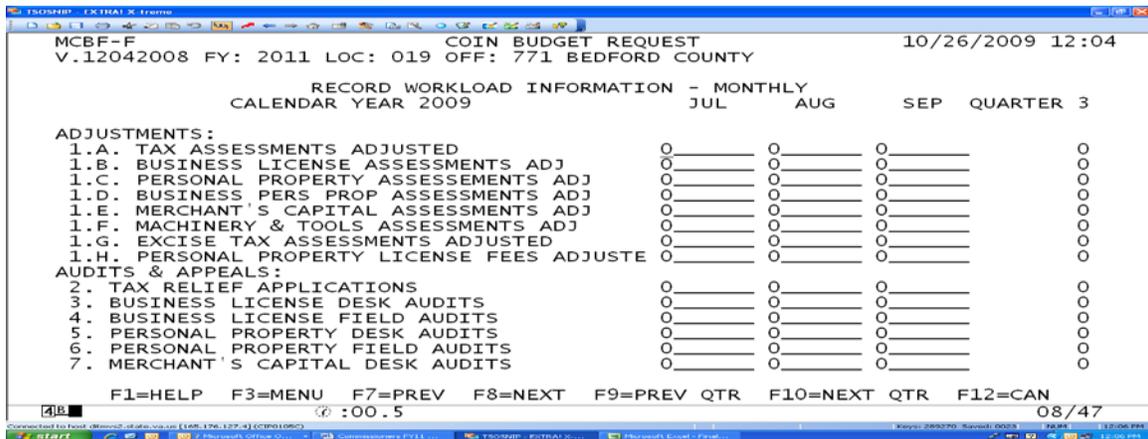
This can be done by selecting options 1, 2, or 3 from the "Record Workload Information" menu

- 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 (quarterly data will first be entered in March)
- 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 the annual data (for FY 20154) to enter CY 20132 data

Option #1 Monthly Screens

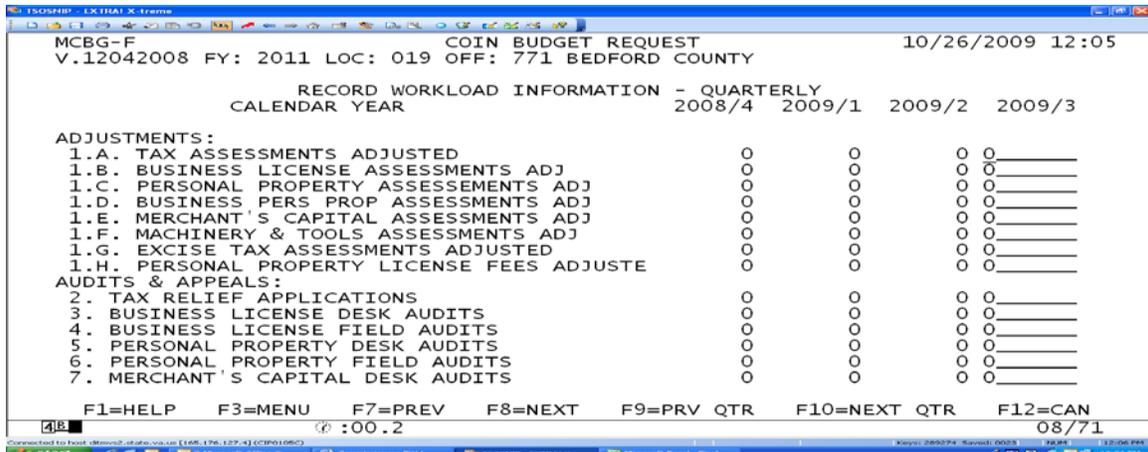
The monthly screens have all the same workload elements as the annual screens only data is entered monthly



Option #2 Quarterly Screens

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)

The quarterly screens have all the same workload elements as the annual screens only data is entered quarterly





10. 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

```

MCS2          COIN BUDGET REQUEST          11/30/2009 15:10
V.10272009 FY: 2011 LOC: 013 OFF: 771 ARLINGTON COUNTY

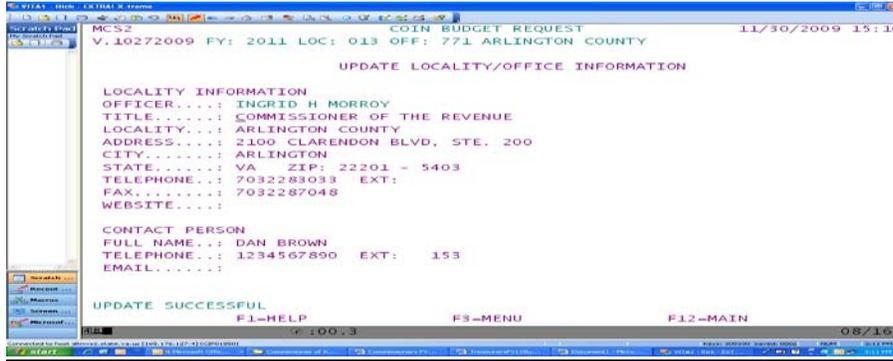
UPDATE LOCALITY/OFFICE INFORMATION

LOCALITY INFORMATION
OFFICER....: INGRID H MORROY
TITLE.....: COMMISSIONER OF THE REVENUE
LOCALITY...: ARLINGTON COUNTY
ADDRESS....: 2100 CLARENDON BLVD, STE. 200
CITY.....: ARLINGTON
STATE.....: VA ZIP: 22201 - 5403
TELEPHONE..: 7032283033 EXT:
FAX.....: 7032287048
WEBSITE....:

CONTACT PERSON
FULL NAME..: DAN BROWN
TELEPHONE..: 1234567890 EXT: 153
EMAIL.....:

UPDATE SUCCESSFUL
F1=HELP          F3=MENU          F12=MAIN
08/16
```

Option #8 Update Locality Information



Procedures:

This screen is used to update the address, website address, phone, and fax numbers for your office. Please also provide the primary contact person, his/her phone number and, an email address so that we may contact you directly should there be questions regarding your budget.

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

Officer Name:	For display purposes only (will change when personnel action has been entered)
Title:	For display purposes only.
Locality:	Enter the locality name. If the locality field includes the officer’s title, please remove it so it only shows the locality name, including distinction between city or county (see example).
Address:	Enter the correct mailing address for your office (street number or P O Box)
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.
Website:	Enter the correct website for your office.
Contact Person:	Type the first and last name of the contact person for the Budget request
Telephone: Ext:	Type the phone number and ext of the contact person for the budget request.
Email:	Type the email address of the contact person for the budget request.

3. Press the “ENTER” key, when you have corrected or completed the information requested
4. Press ‘F3 =Exit’ to exit the screen to budget request menu

NOTE: When changes in the address occur during the year you may use option 8 from the COIN Main Menu to update this information.

Update Officer and/or County/City Administrator Email Address
(Compensation Board Website www.scb.virginia.gov)

5. If you wish to receive communications from the Compensation Board via email, you may update the email addresses for Constitutional Officers, Contact or county/city administrators for your offices by clicking on the link below and following these instructions:
 - a. <http://www.scb.virginia.gov/cbemail1.cfm>
 - b. Enter your FIPS Code **001-840** (Accomack-Winchester) The number you use to access COIN each month
 - c. Enter you Office Code **-771** (Commissioner)
 - d. County/City Administrators enter office code **-100**
 - e. Click '**SUBMIT**'
 - f. To add a new email address Click '**ADD EMAIL ADDRESS**'
 - g. To delete an email address, click on the email address to be deleted and click '**DELETE**'
 - h. To change a current email address click on the email address, correct the email address and then click '**UPDATE**'



11. Option #9, Special Program Certification

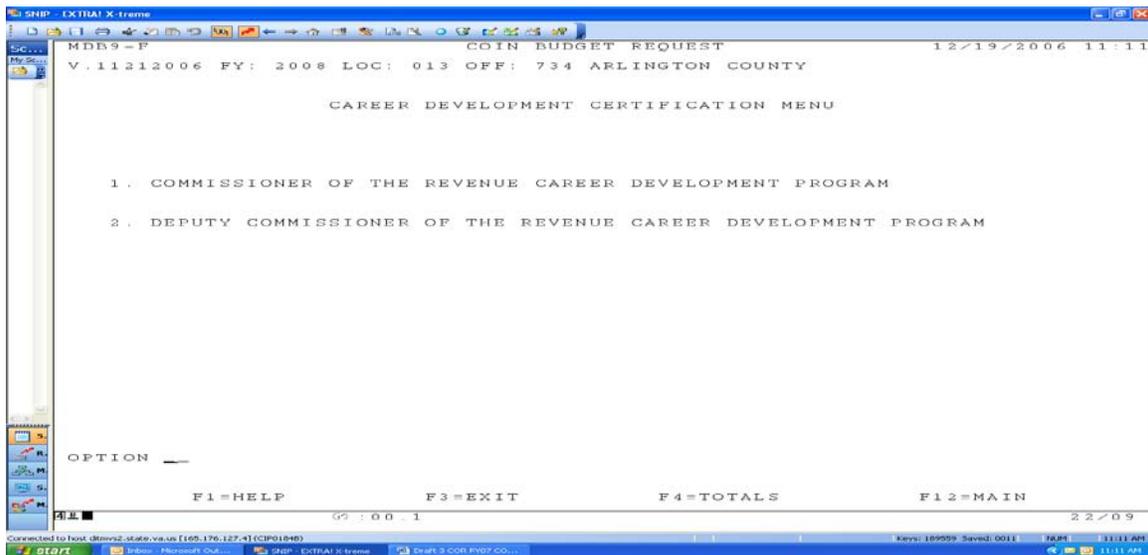
Purpose:

Specified Certification Programs are accessed from the COIN Budget Request menu. The program will determine based on locality and office which special programs to display.

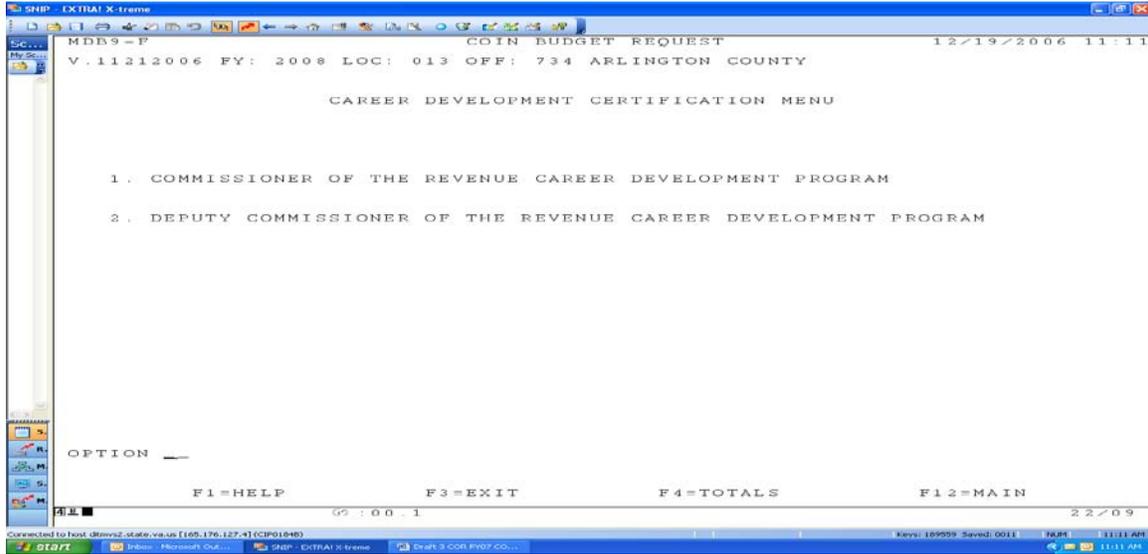
- **Commissioners of the Revenue Career Development Program**
 - **If the Commissioner of the Revenue is not certified** you **must** answer the question “Commissioner meets all Criteria of CDP Y/N” with “N” for No and signoff on the program. This verifies that the screen was viewed by each office.
 - If the Commissioner of the Revenue has already received their increase they **must** re-apply for career development **each year** by completing the Commissioner of the Revenue Career Development Certification in COIN by February 1 to maintain the CDP increase.
 - The Officer must adopt the Deputy Commissioner Career Development Program to be eligible for participation in the Commissioner of the Revenue Career Development Program.
 - Do not enter the Commissioner’s name on this screen.
- **Deputy Commissioners of the Revenue Career Development Program**
 - ✓ The blanks on this screen are only for the names of Certified Deputy Commissioners, **not** deputies who are participating and enrolled.
 - ✓ Deputies that have already received their CDP increase **must** be entered on this screen **each year** to maintain the salary increase for the Career Development Program.

Navigational Path:

- COIN Main Menu – Select #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #9, Special Program Certification



Option #9, Special Program Certification



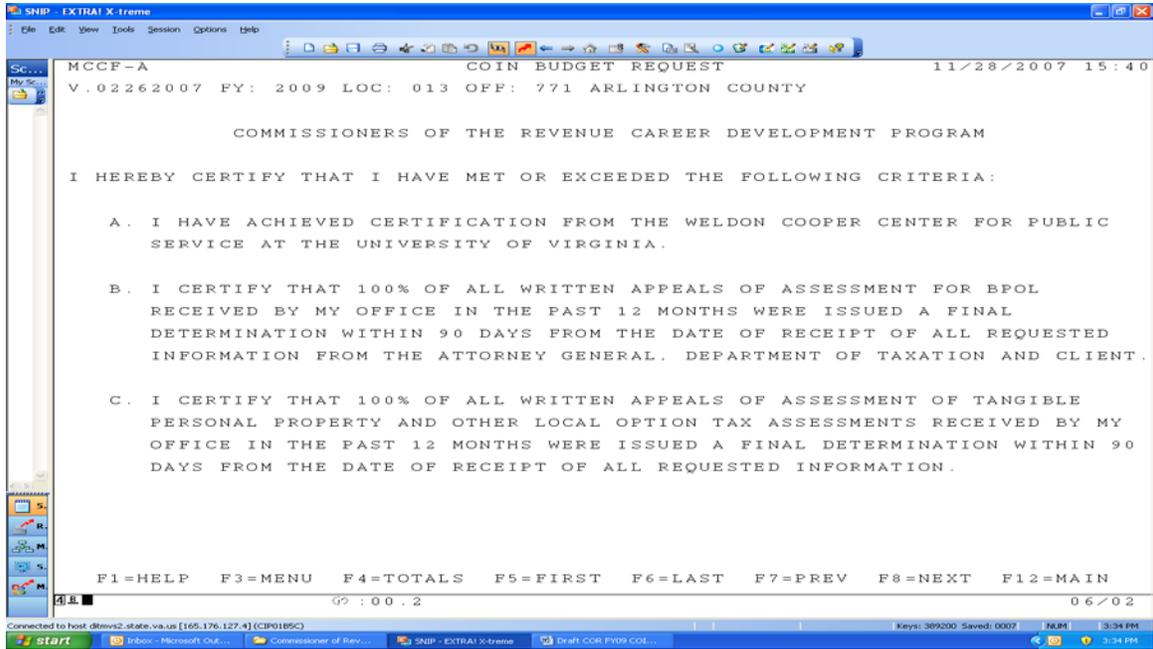
Procedures:

- Read through each Special Program Certification Screen and if you comply with the program criteria as stated
 - ✓ List employees that participate in the Career Development Programs
 - ✓ Enter the Officer's SCB USERID as the Approval User-ID
- Option #1 Commissioner of the Revenue Career Development Program
- Option #2 Deputy Commissioner of the Revenue Career Development Program

Option #9, Special Program Certification

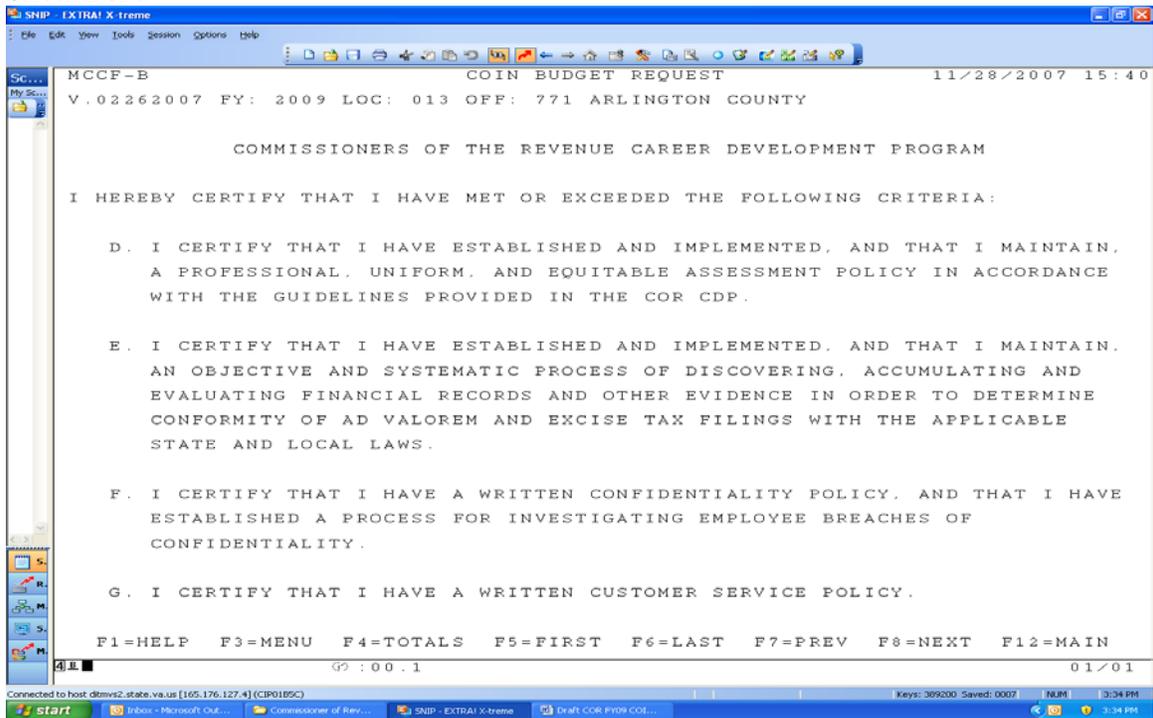
Option #1 Commissioner of the Revenue Career Development Program

Screen 1 of 7



Read and then Press 'F8' to proceed to the next page

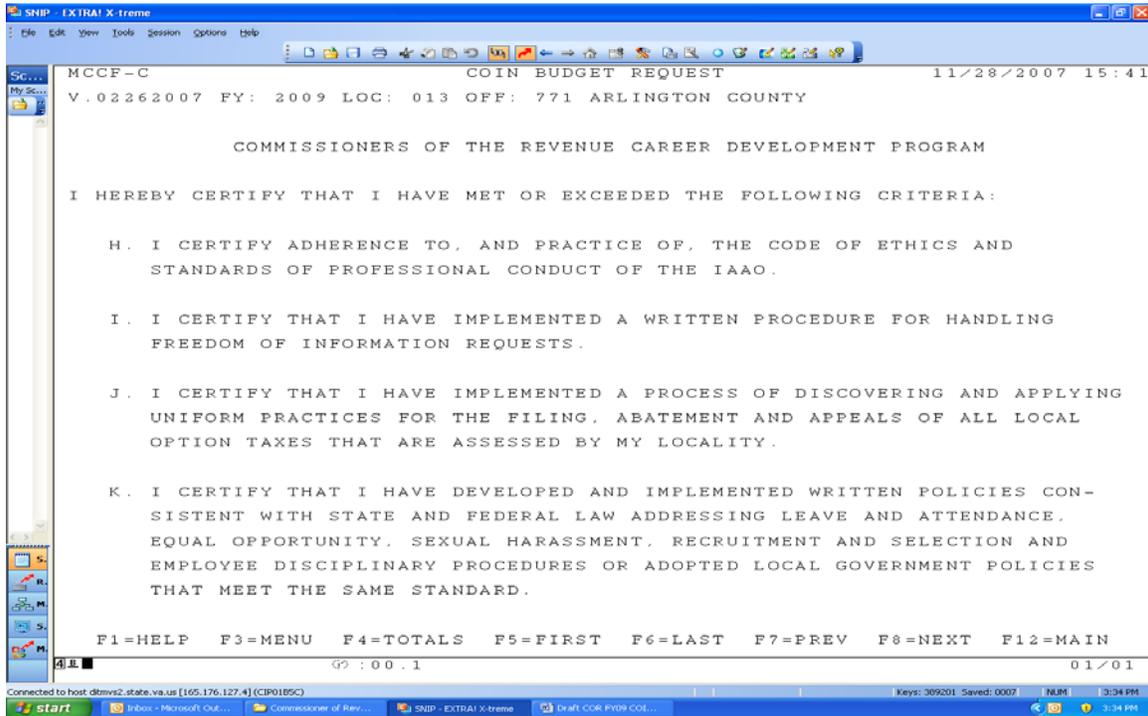
Screen 2 of 7



Read and then Press 'F8' to proceed to the next page

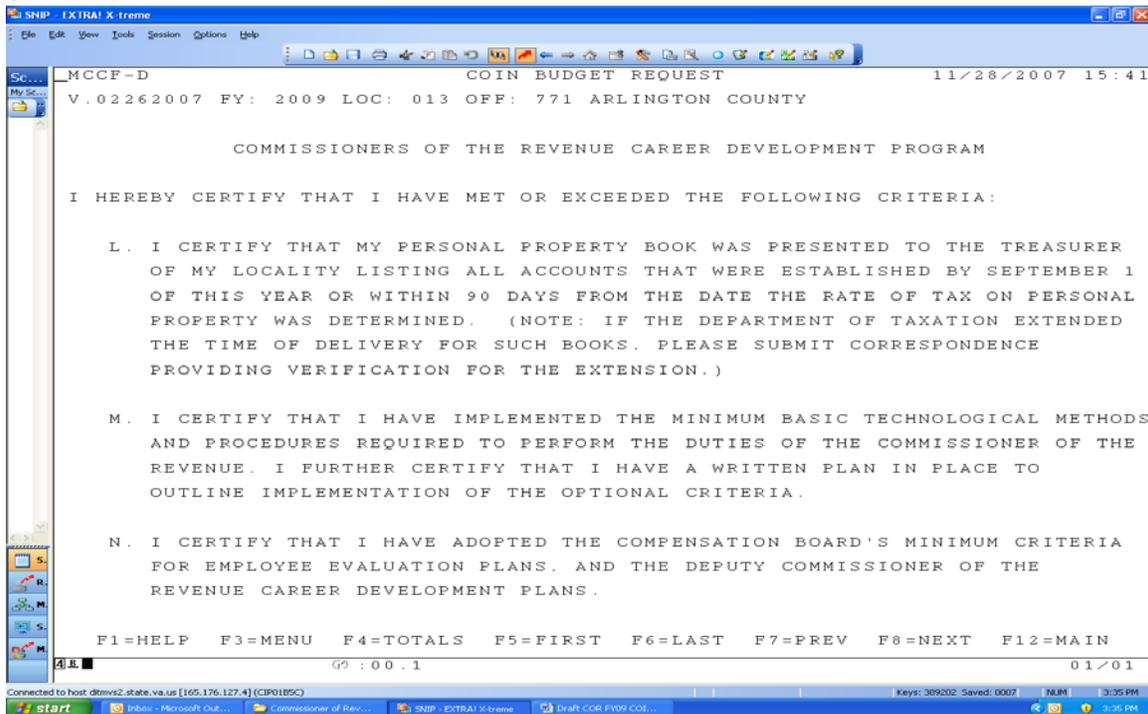
Option #9, Special Program Certification

Screen 3 of 7



Read and then Press 'F8' to proceed to the next page

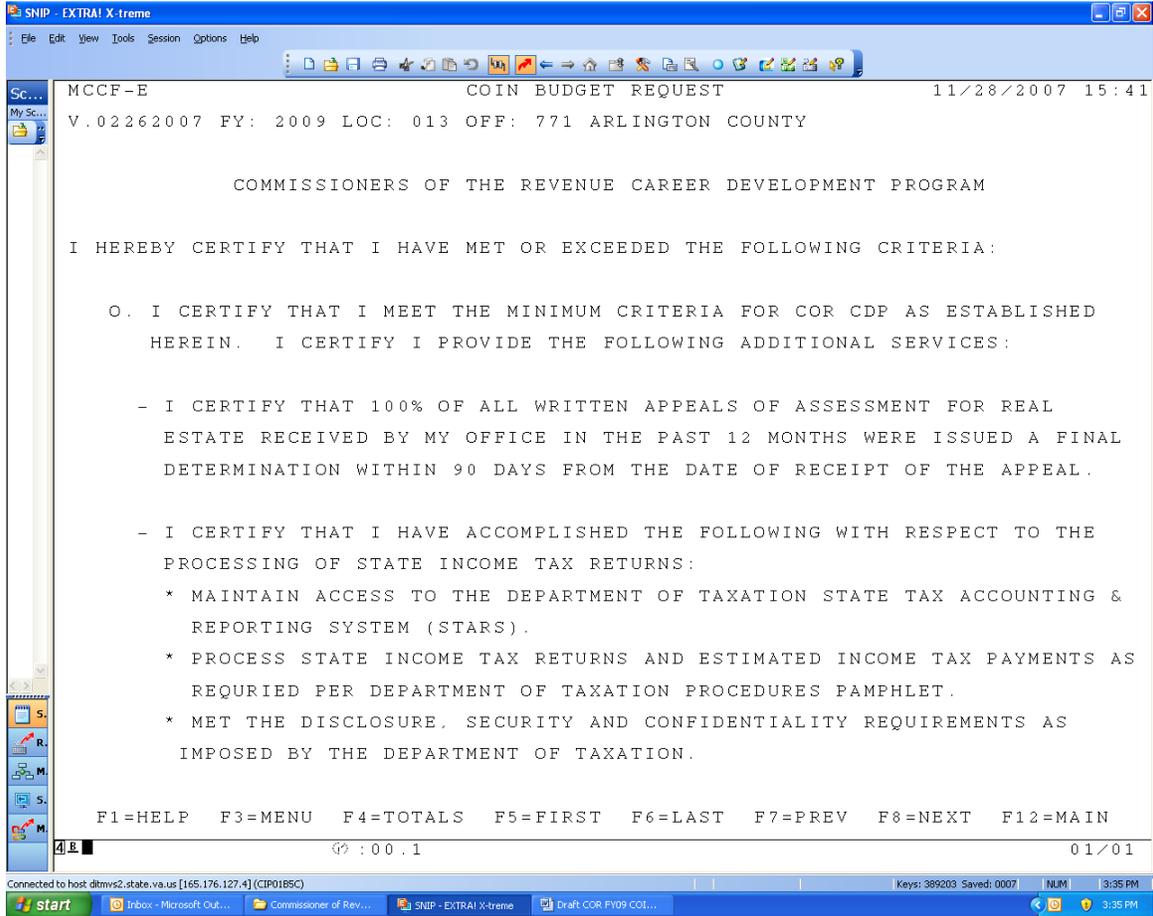
Screen 4 of 7



Read and then Press 'F8' to proceed to the next page

Option #9, Special Program Certification

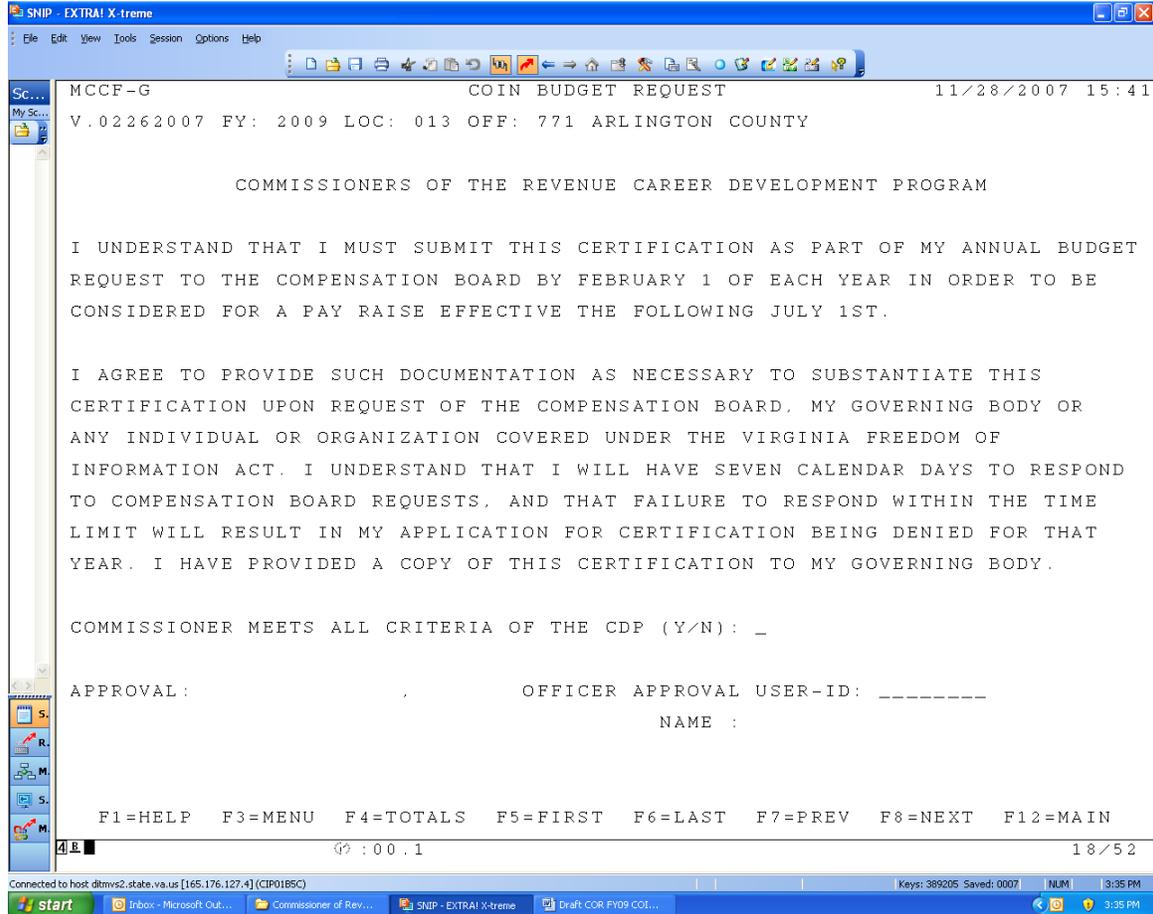
Screen 5 of 7



Read and then Press 'F8' to proceed to the next page

Option #9, Special Program Certification

Screen 7 of 7



- Enter a ‘Y’ or ‘N’ for “Commissioner meets all criteria for CDP”.
- Enter the Officer’s SCB USERID to certify

Helpful Hints

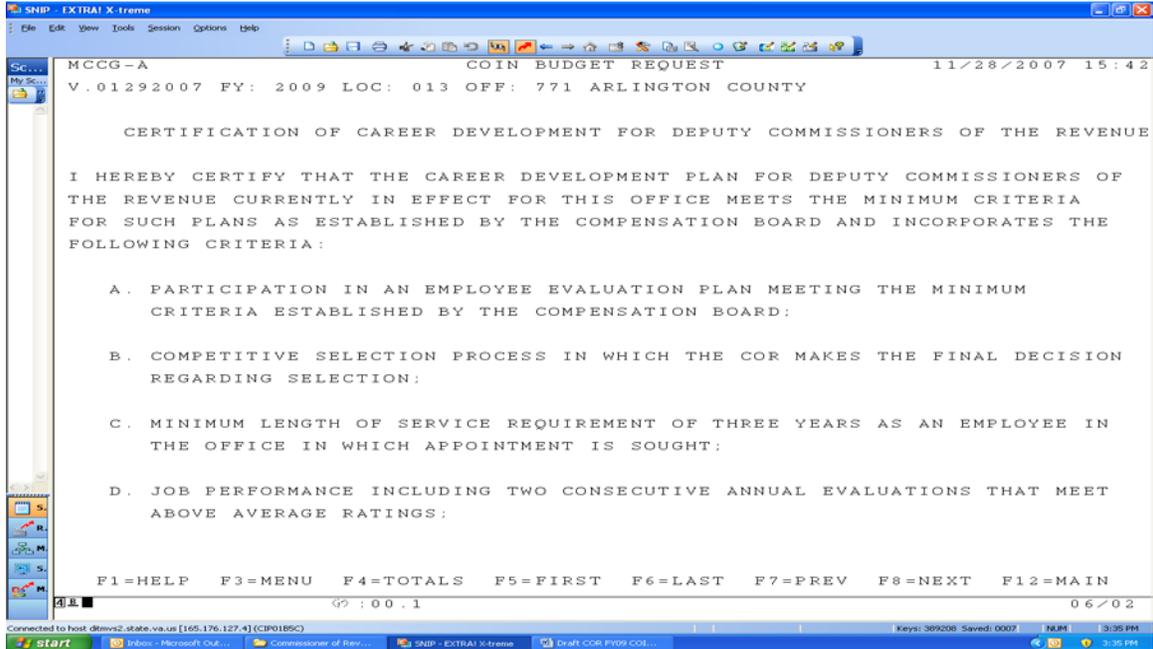
- If the Commissioner is **not certified** you **must** answer “N” to the question “Commissioner meets all criteria of CDP”.

Option #9, Special Program Certification

Option #2 Deputy Commissioner of the Revenue Career Development Program

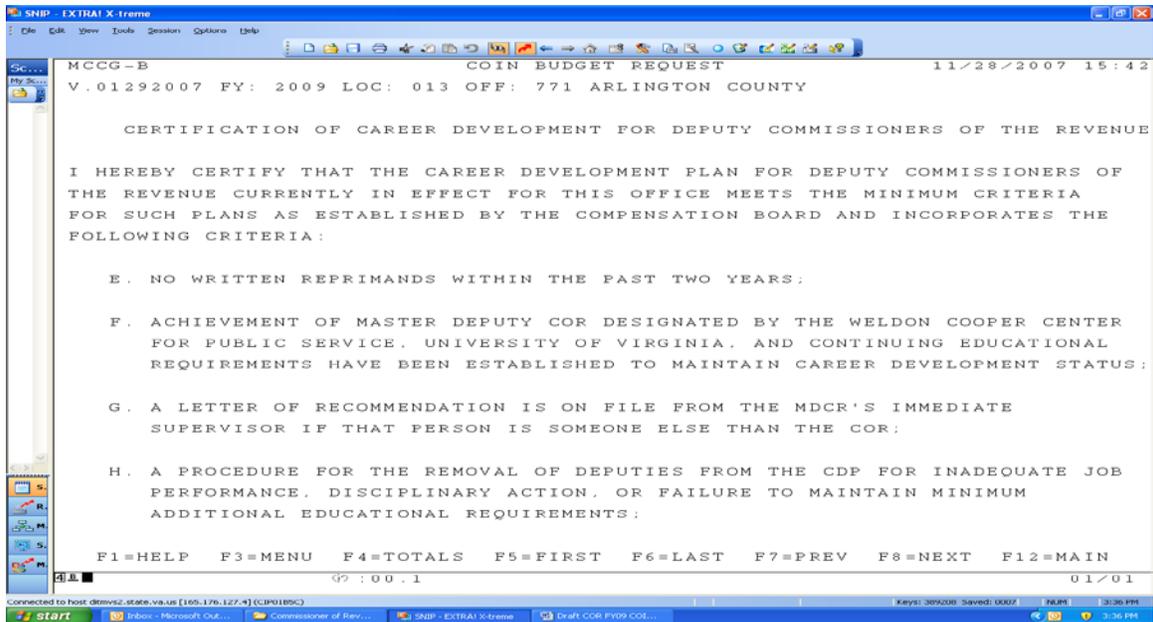
Read through each screen to determine compliance with Compensation Board Minimum Standards for Deputy Commissioner Career Development Program.

Screen 1 of 5



Read and then Press 'F8' to proceed to the next page

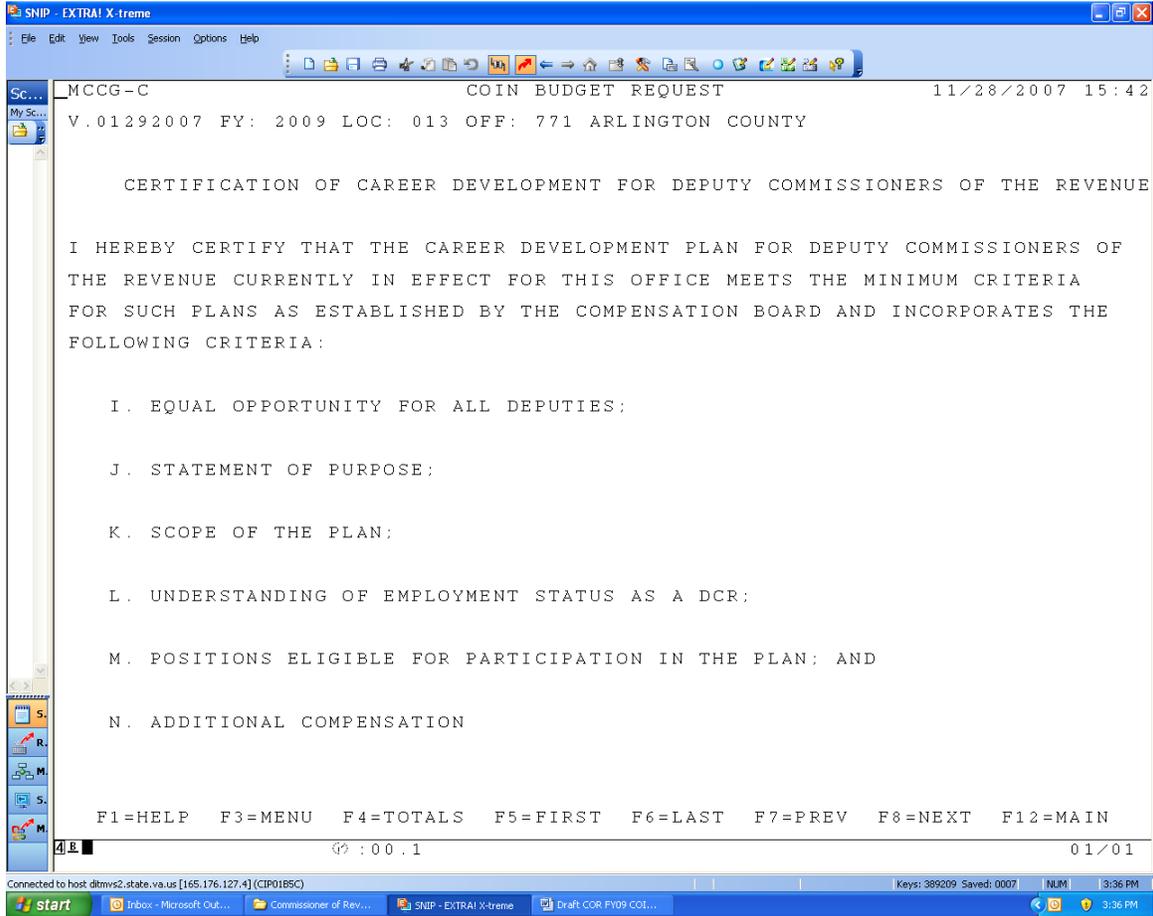
Screen 2 of 5



Read and then Press 'F8' to proceed to the next page

Option #9, Special Program Certification

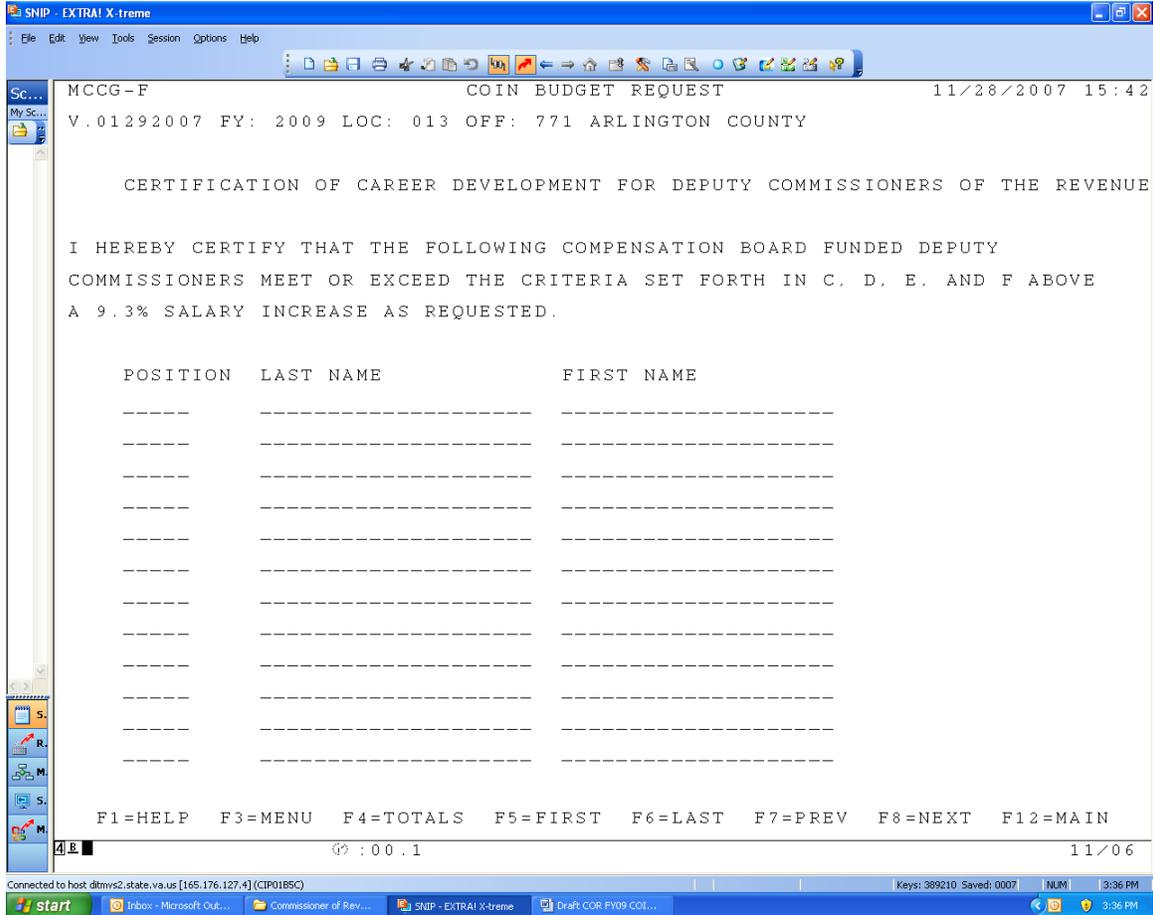
Screen 3 of 5



Read and then Press 'F8' to proceed to the next page

Option #9, Special Program Certification

Screen 4 of 5



Enter the following information for each employee who is a sworn Deputy Commissioner and for whom you seek a 9.3% pay increase **or any deputy who has already received the increase and is maintaining certification:**

- Position Number

Last and First Name will appear based on the Current Information contained in COIN's tables once you hit 'ENTER' to process.

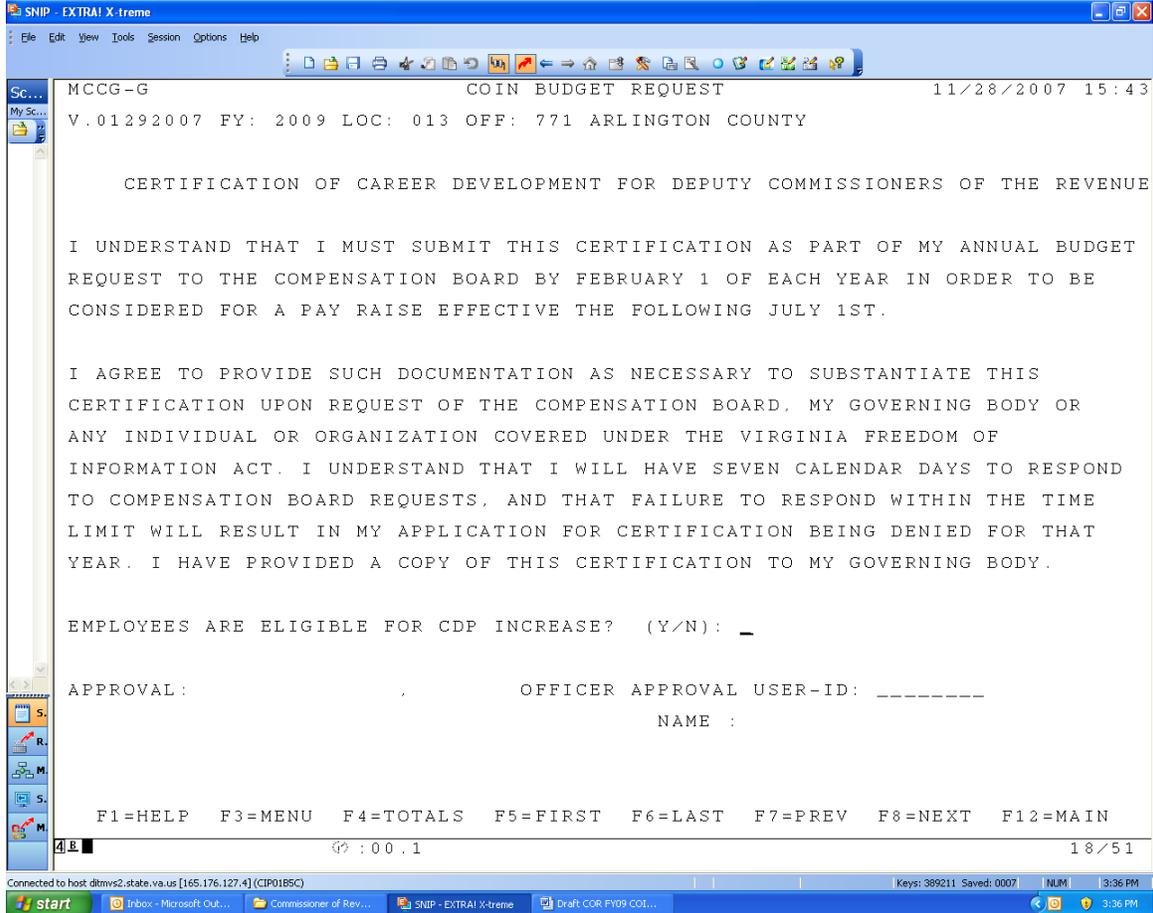
Press 'F8' to proceed to the next page

Helpful Hints

- Only certified deputies should be on this page.
- This page **is not** for deputies that are simply participating and enrolled.

Option #9, Special Program Certification

Screen 5 of 5



Enter a ‘Y’ or ‘N’ for “Deputy is eligible for the CDP increase”

- Only use ‘N’ if you have no eligible deputies

Enter the Officer’s SCB USERID to certify



12. Option #10 - Certify Budget Request

Purpose:

The Certify Budget Request screen 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:

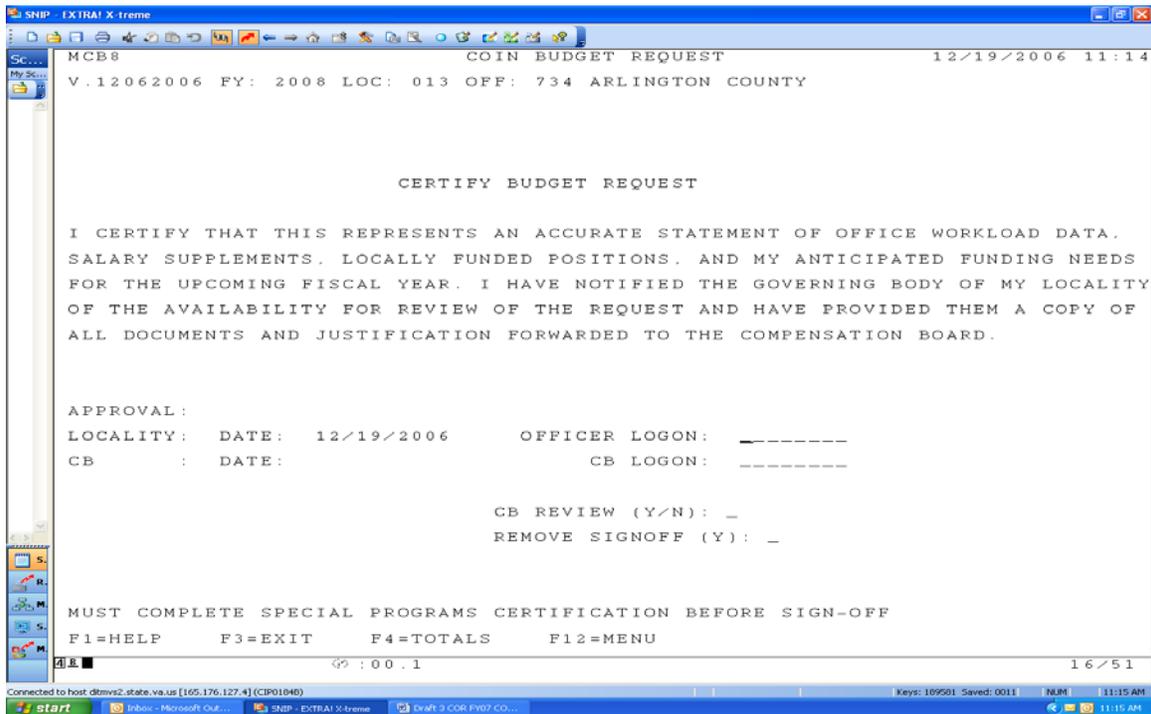
- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #10, Certify Budget Request

COMMISSIONERS OF THE REVENUE

Helpful Hints:

- If you enter 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
 - 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 fiscal year budget submission
- Press the "Enter" key after completing the information requested
- Press 'F3' to exit the screen to the Budget Request Menu



13. Option #11, Comments

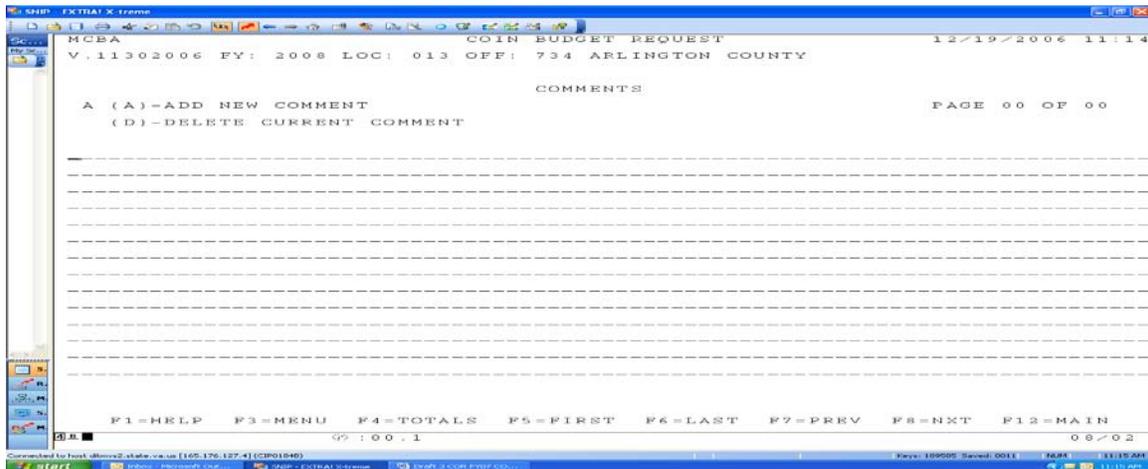
PURPOSE:

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

COMMISSONER's OF THE REVENUE



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



14. 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 12/19/2006 11:15
V. 10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY

BUDGET REQUEST TOTALS

PERMANENT PERSONNEL

	BUDGET	-ESTIMATED	BUDGET-	REIM	-ESTIMATED	REIM-
	SALARY	FRINGES	TOTAL	SALARY	FRINGES	TOTAL
CURR BDGT	806,871	92,225	899,096	442,414	50,567	492,981
REQUESTED	806,871	92,225	899,096	442,414	50,567	492,981
COMP BOARD	0	0	0	0	0	0
TOTAL PERMANENT PERSONNEL:		19				

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

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

COMMISSONERS OF THE REVENUE

1ST SCREEN OF 3:

MCBB-A COIN BUDGET REQUEST 12/19/2006 11:15
 V.10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY

BUDGET REQUEST TOTALS

PERMANENT PERSONNEL

	BUDGET SALARY	-ESTIMATED FRINGES	BUDGET- TOTAL	REIM SALARY	-ESTIMATED FRINGES	REIM- TOTAL
CURR BDGT	806.871	92.225	899.096	442.414	50.567	492.981
REQUESTED	806.871	92.225	899.096	442.414	50.567	492.981
COMP BOARD	0	0	0	0	0	0
TOTAL PERMANENT PERSONNEL :			19			

TEMPORARY PERSONNEL

	BUDGET SALARY	-ESTIMATED FRINGES	BUDGET- TOTAL	REIM SALARY	-ESTIMATED FRINGES	REIM- 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
 02/17

PROCEDURES:

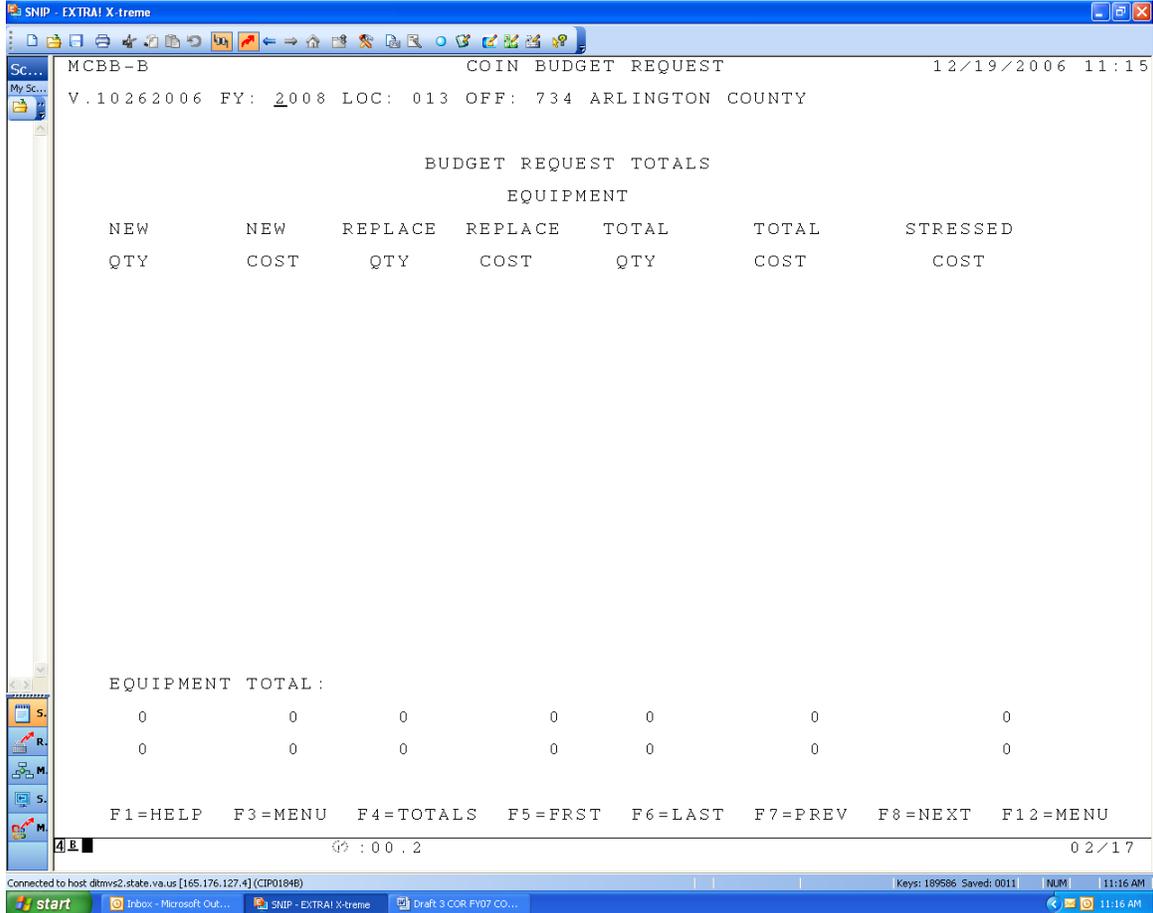
- **1ST SCREEN OF 3:**

- ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your current 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

COMMISSIONERS OF THE REVENUE

2ND SCREEN OF 3:



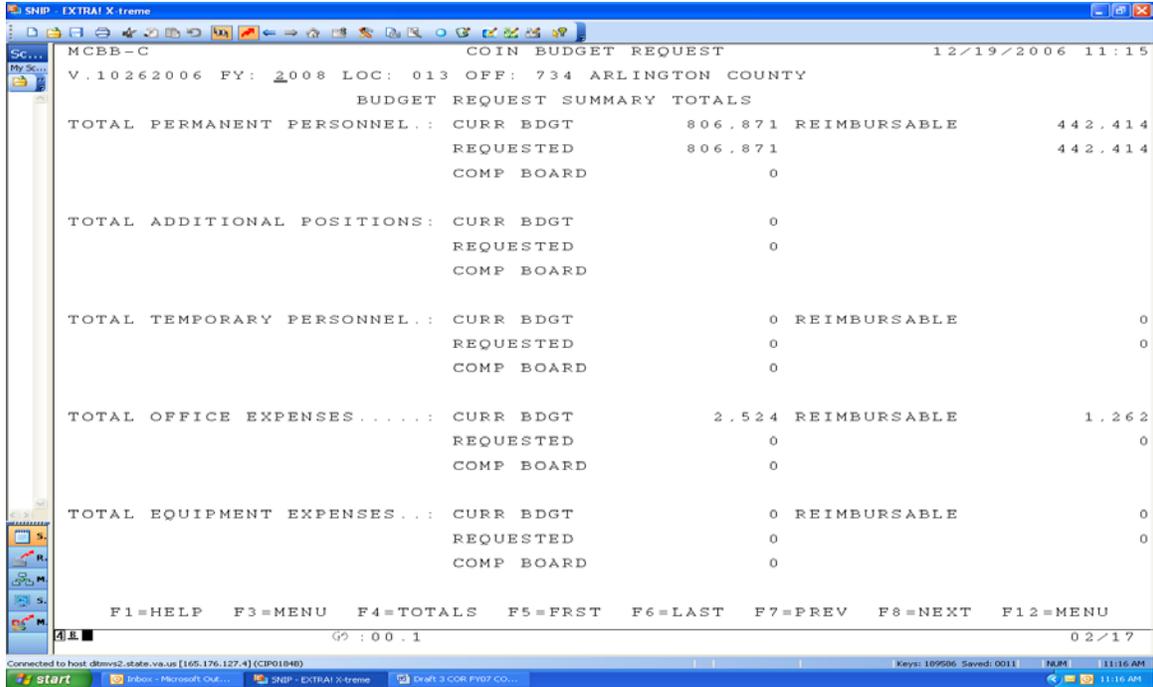
• **2ND SCREEN OF 3:**

- ✓ 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
 - This information is subject to change as you make revisions to your budget request
 - 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
 - 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'

'F4' Budget Request Totals

COMMISSIONERS OF THE REVENUE

3RD SCREEN OF 3:

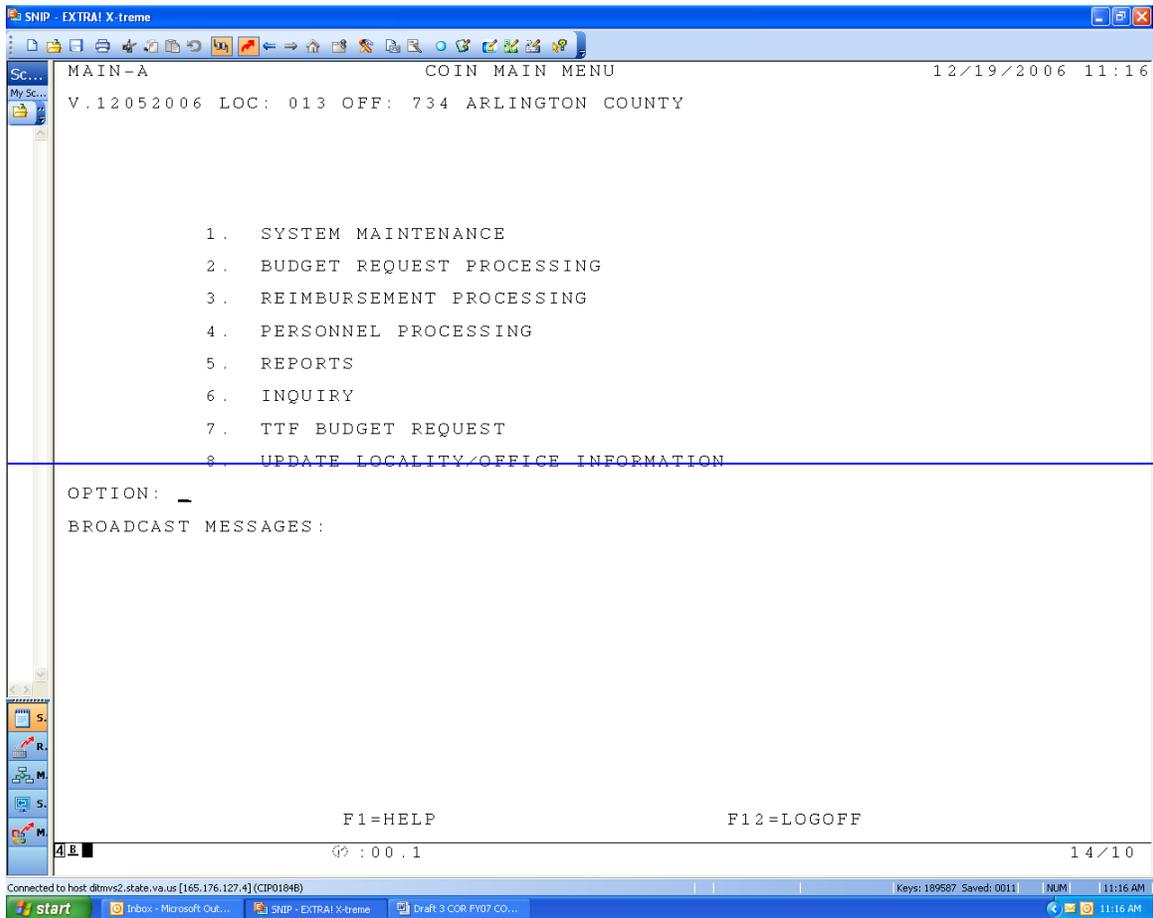


• **3RD SCREEN OF 3:**

- ✓ 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 current 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'

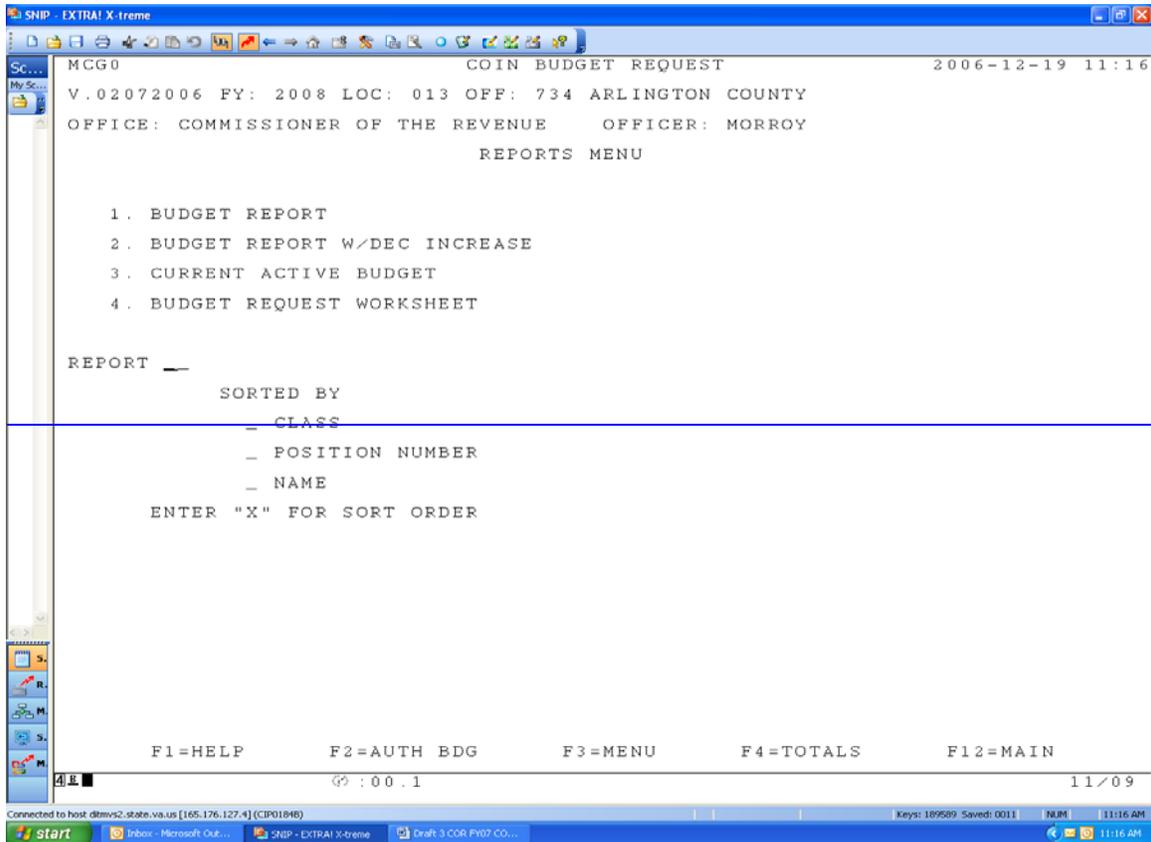
- Press 'F3' to exit the screen to the Budget Request Menu

15. Main Menu Option #5 Budget Reports



• **Select Option #5 "Reports"**

Main Menu Option #5--Budget Reports

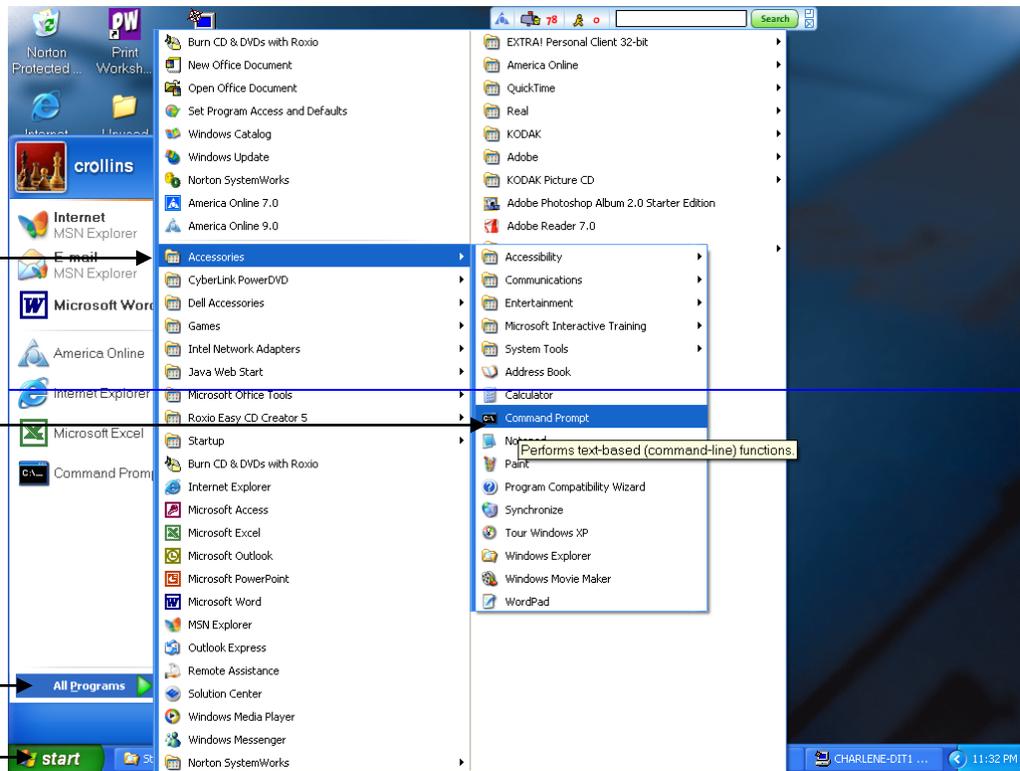


There are 4 versions of the Budget Report that are available.

- 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

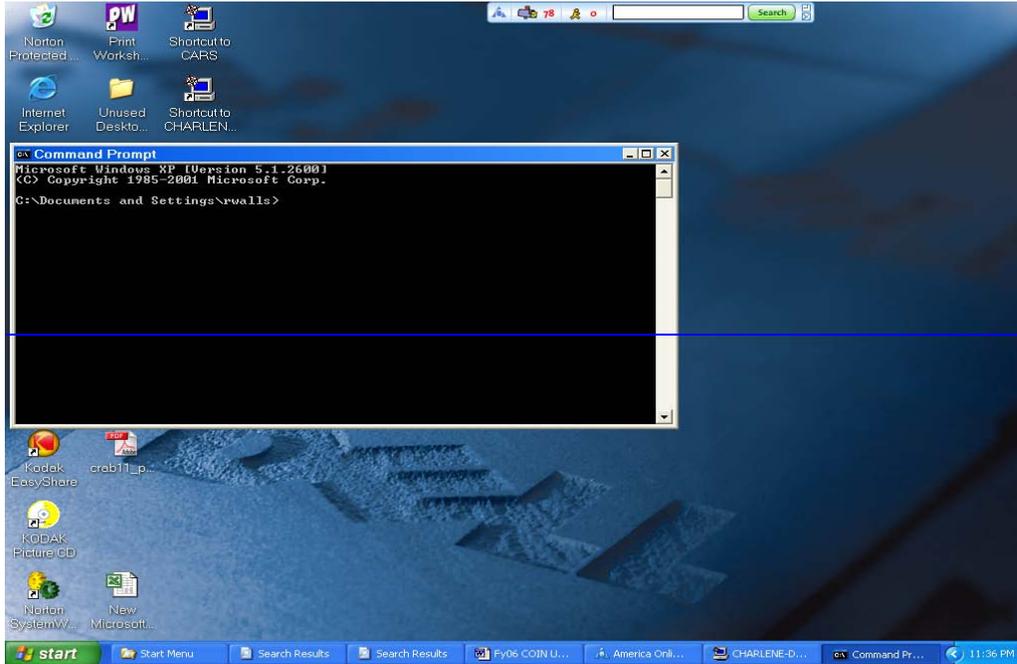
16. Download Instructions



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: youremail@email.gov Press the "Enter" key
5. PASSWORD: _____ 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.o771.wbudget.rtf' Press the "Enter" key

 (lowercase with single quotes, lowercase L locality 1001.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.rtf** (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

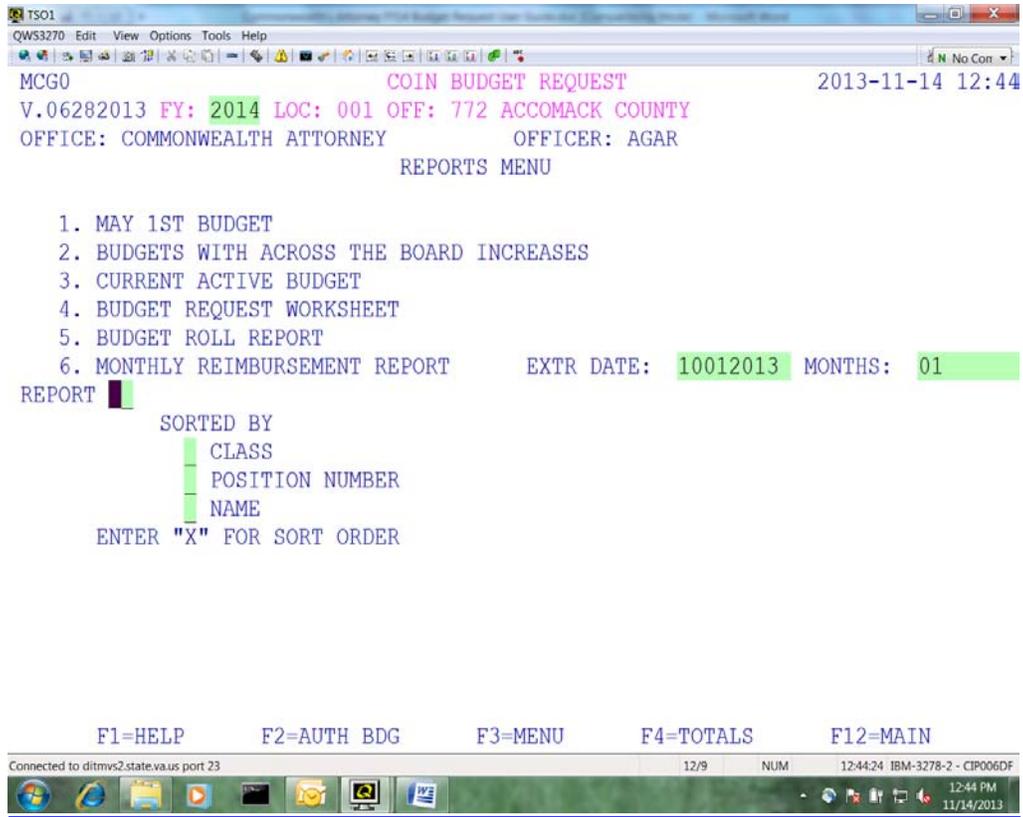
If you should experience problems with retrieving a file, and would like to have your Budget Report emailed to you, please email one of the individuals listed below. Please be sure to include your Locality number and your Office number in your email request.

Anne Wilmoth — anne.wilmoth@seb.virginia.gov

Dan Munson — dan.munson@seb.virginia.gov

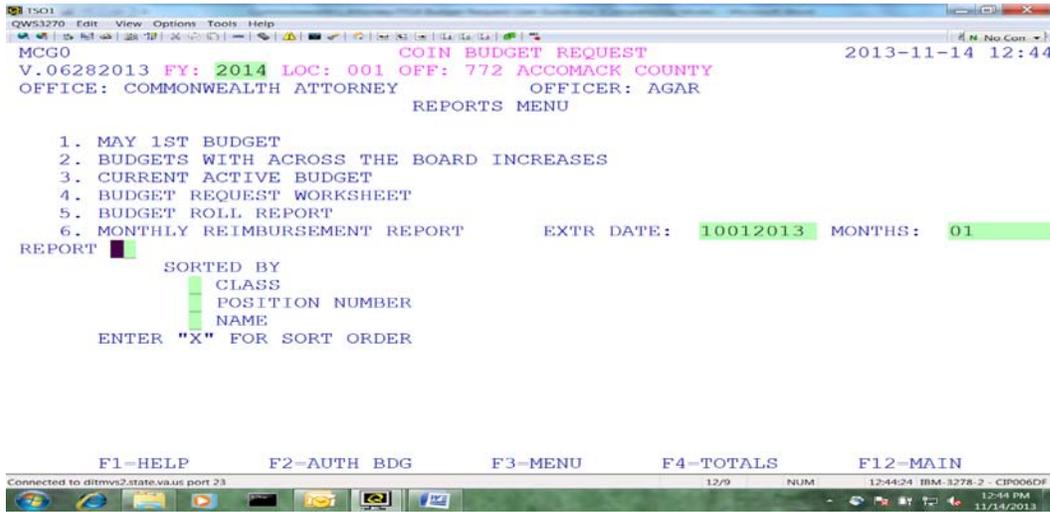
Craig Giegerich — craig.giegerich@seb.virginia.gov

CONSTITUTIONAL OFFICER'S INFORMATION NETWORK (COIN) USER'S GUIDE



- Select Option #5- "Reports"

Main Menu Option #5 - Budget Reports

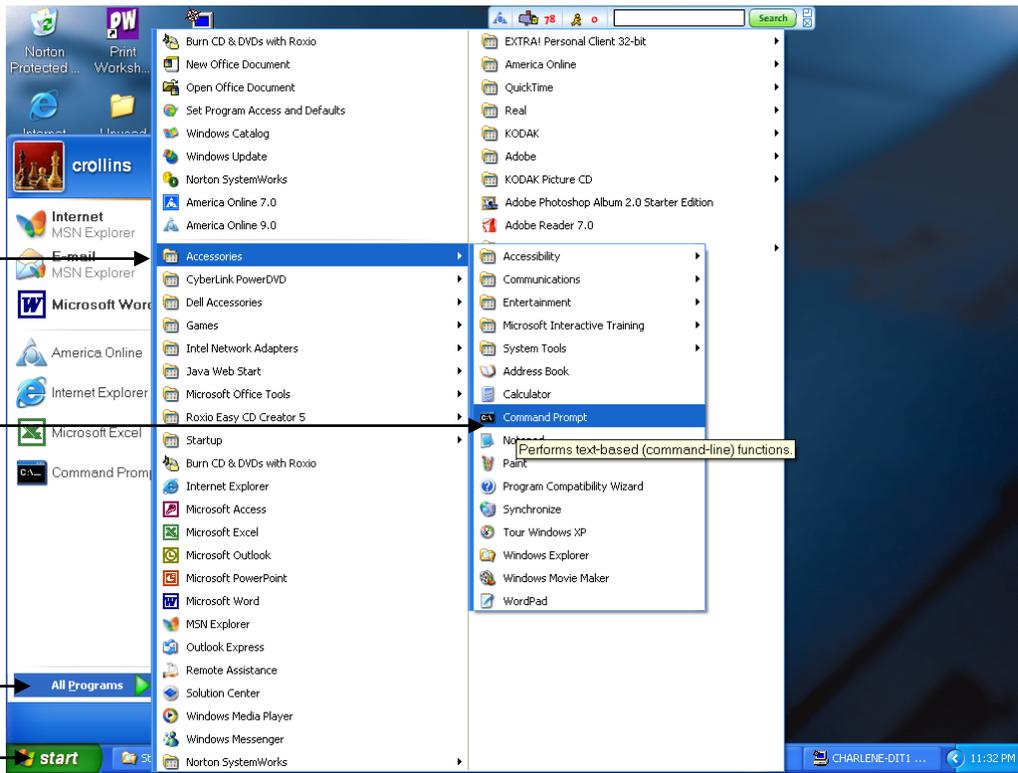


There are 6 versions of the Budget Report that are available.

- Option #1 “May 1st Budget”- This is the Historical Budget Report, listing all changes to your budget since it went into effect.
- Option #2 “Budget Report W/Aug. Increase”- This is the Budget with the August 1 increases factored in. This report is available in July.
- Option #3 “Current Active Budget”– This is the Budget showing the personnel changes entered to date.
- 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.
- Option #5 “Budget Roll”- This is the Budget as set on May 1st for the current Fiscal Year.
- Option #6 “Monthly Reimbursement Report”- This report details the salary and fringe benefit amounts for each individual position. By selecting the date and number of months to be viewed, multiple months may be downloaded at one time.

1. Change the Fiscal Year to the new fiscal year or fiscal year desired
2. Enter the desired Budget Report option
3. Enter the sort option desired (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.
4. Press Enter and print the screen
5. The name of the file to download will be displayed at the bottom of the screen. Enter the name of the file in the download instructions #10

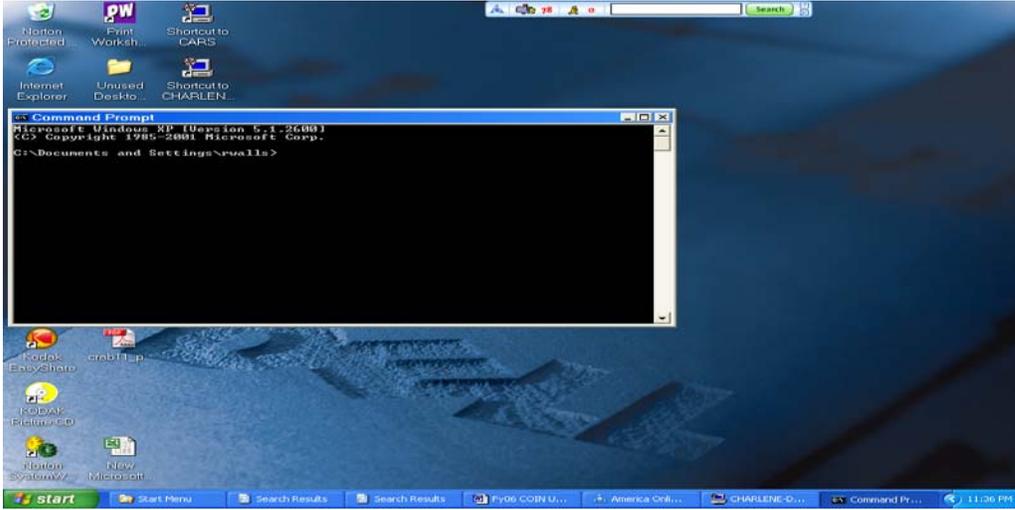
16. Download Instructions



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: [schte06 \(lowercase\)](#) Press the “Enter” key
5. -PASSWORD: [schte06 \(lowercase\)](#) 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.o307.bud51.rtf'](#) Press the “Enter” key
(lowercase with single quotes, lowercase L-locality l001.lowercase O-office code.budget.rtf) (Accomack – Sheriff)
1. The file to download for option 1 is ['scb.prod.coin.lxxx.oxxx.bud51.rtf'](#)
 2. The file to download for option 2 is ['scb.prod.coin.lxxx.oxxx.abudget.rtf'](#)
 3. The file to download for option 3 is ['scb.prod.coin.lxxx.oxxx.budget2.rtf'](#)
 4. The file to download for option 4 is ['scb.prod.coin.lxxx.oxxx.wbudget.rtf'](#)
 5. The file to download for option 5 is ['scb.prod.coin.lxxx.oxxx.budroll.rtf'](#)
 6. The file to download for option 6 is ['scb.prod.coin.lxxx.oxxx.remrpt.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

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Anne Wilmoth – anne.wilmoth@scb.virginia.gov

Dan Munson – dan.munson@scb.virginia.gov

Craig Giegerich – craig.giegerich@scb.virginia.gov

Melanie Morrison- melanie.morrison@scb.virginia.gov

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17. Appendix

Classifications And Pay Plans

COMMISSIONER'S OF THE REVENUE

**CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE
COMMISSIONER OF THE REVENUE**

AUGUST~~DECEMBER~~ 1, 201~~32~~³² - JUNE 30, 201~~43~~⁴³

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
GENERAL OFFICE CLERK CLERK TYPIST	GC, MGC CT, MCT	1	Administrative	<u>20,452</u>	<u>38,492</u>
TAX EXAMINER I DEPUTY I SECRETARY I	TEI, MTEI DI, MDI SECI, MSECI			<u>19,856</u>	<u>37, 374</u>
DEPUTY II SECRETARY II	DII, MDII SECII, MSECII	2	Sr. Administrative	<u>24,435</u>	<u>47,036</u>
MAPPING TECHNICIAN	MT, MMT			<u>23,723</u>	<u>45, 666</u>
DEPUTY III ADMINISTRATIVE ASSISTANT	DIII, MDIII AA, MAA	4	Professional	<u>29,213</u>	<u>60,072</u>
DEPUTY IV	DIV, MDIV			<u>28,362</u>	<u>58, 322</u>
CHIEF DEPUTY I	CDI, MCDI	7	Sr. Professional	<u>34,902</u>	<u>78,457</u>
CHIEF DEPUTY II	CDII, MCDII			<u>33,885</u>	<u>76, 172</u>
CHIEF DEPUTY III	CDIII, MCD3	8	Supervisory/ Management	<u>45,380</u>	<u>119,835</u>
CHIEF DEPUTY IV	CDIV, MCDIV			<u>44,058</u>	<u>116, 345</u>

M - denotes participation in Deputy Commissioners Career Development Program

* 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.