Constitutional Officer Information Network

C•IN

Budget Request Guide

Directors of Finance

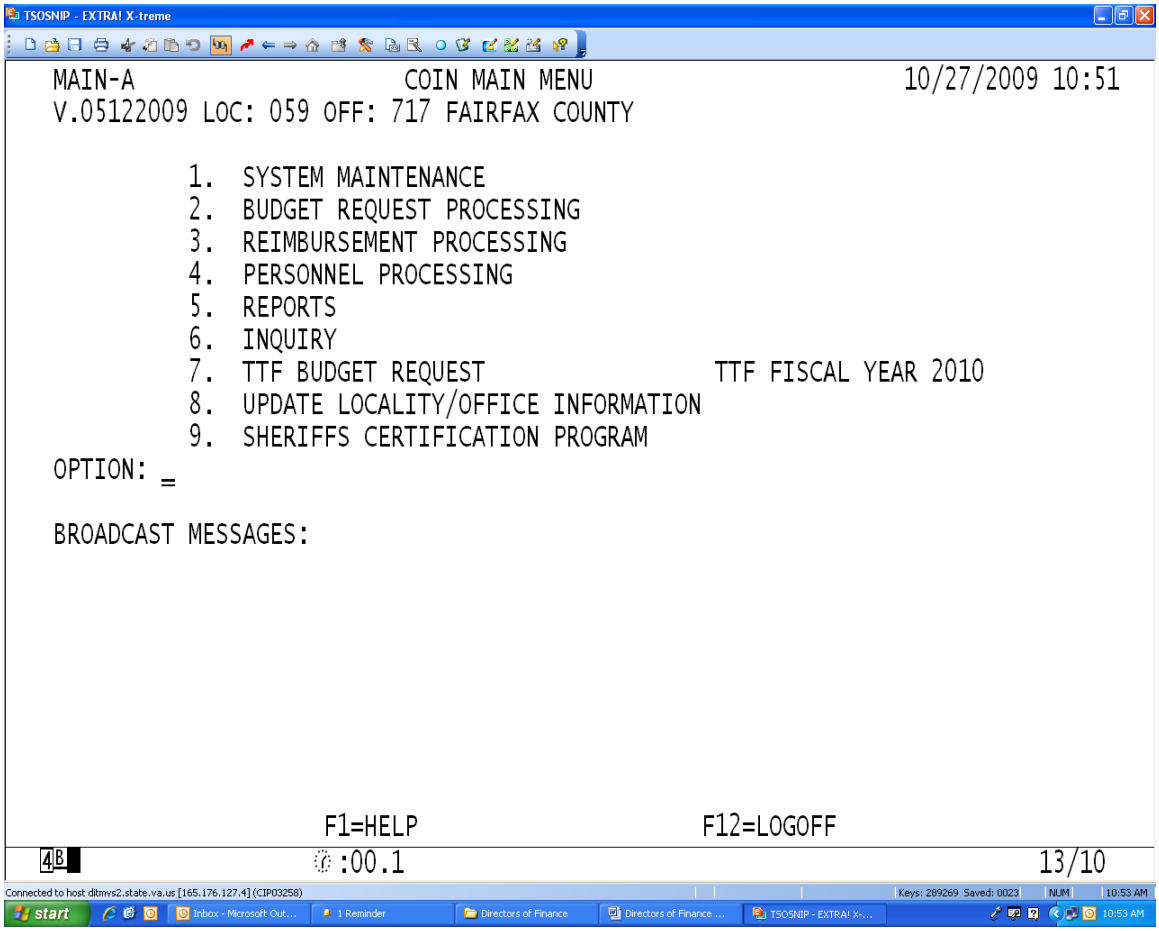
Compensation Board
December 1, 2015

Page Intentionally Left Blank

Table of Contents

1. COIN MAIN MENU 1
2. Main Menu - Option #2, Budget Request (OLB) Menu 2
3. Option #1, Permanent Personnel 4
4. Option #2, Additional Personnel Request 6
5. Option #3, Temporary Personnel Fund Request 8
6. Option #4, Fully Or Partially Funded Personnel 10
7. Option #5, Office Expense Funding Request 13
8. Option #6, Equipment 15
9. Option #7, Record Workload Information 19
10. Option #8 – Update Locality Information 40
11. Option #9, Special Program Certification 44
12. Option #10 - Certify Budget Request 54
13. Option #11, Comments 56
14. Function Key 'F4' - Budget Request Totals 57
15. Main Menu Option #5 Budget Reports 61
16. Download Instructions ..... Error! Bookmark not defined.
17. Appendix 67

1. COIN MAIN MENU



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

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

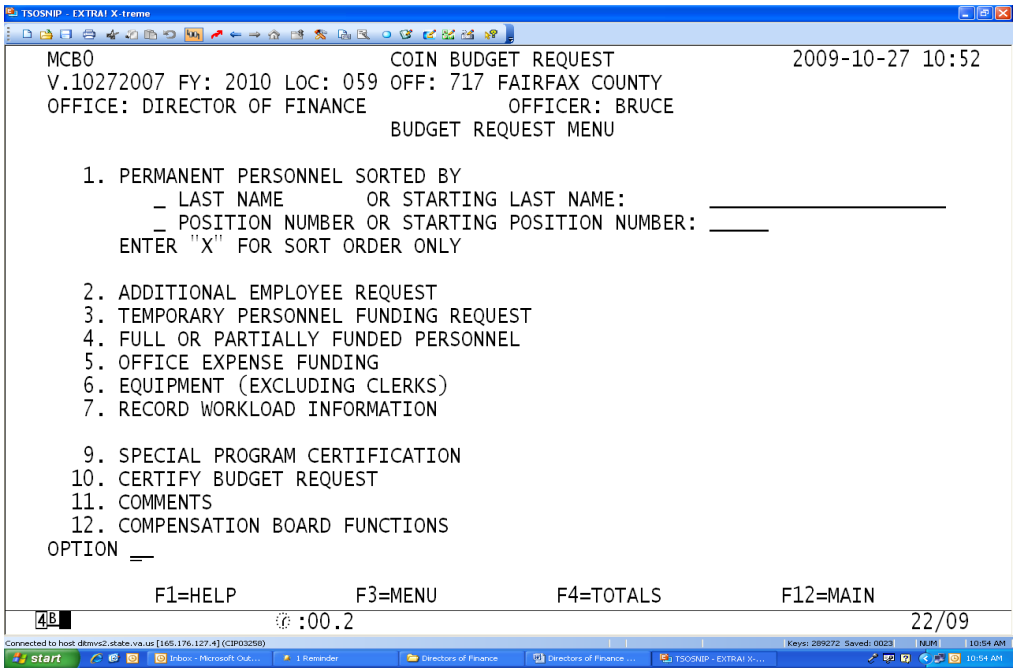
Purpose:

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

DIRECTORS OF FINANCE

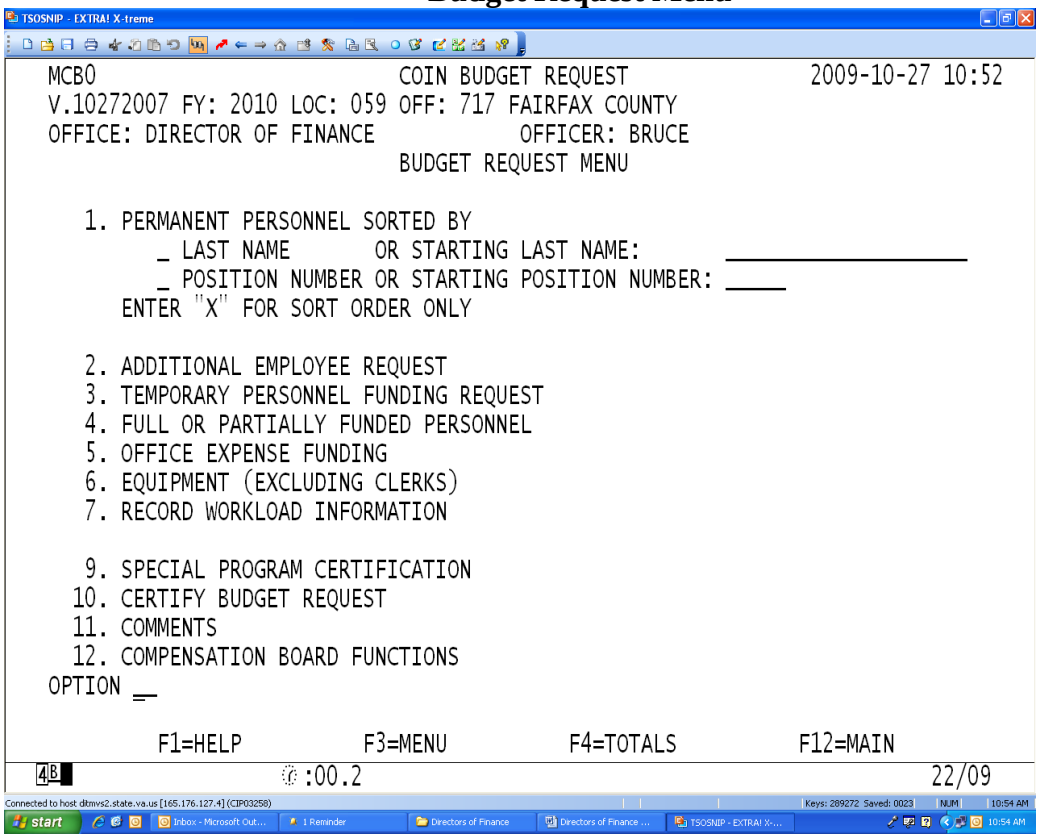


```
MCB0                          COIN BUDGET REQUEST                2009-10-27 10:52
V.10272007 FY: 2010 LOC: 059 OFF: 717 FAIRFAX COUNTY
OFFICE: DIRECTOR OF FINANCE            OFFICER: BRUCE
                              BUDGET REQUEST MENU

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

   2. ADDITIONAL EMPLOYEE REQUEST
   3. TEMPORARY PERSONNEL FUNDING REQUEST
   4. FULL OR PARTIALLY FUNDED PERSONNEL
   5. OFFICE EXPENSE FUNDING
   6. EQUIPMENT (EXCLUDING CLERKS)
   7. RECORD WORKLOAD INFORMATION

   9. SPECIAL PROGRAM CERTIFICATION
  10. CERTIFY BUDGET REQUEST
  11. COMMENTS
  12. COMPENSATION BOARD FUNCTIONS
OPTION __

          F1=HELP          F3=MENU          F4=TOTALS          F12=MAIN
4B                  :00.2                                          22/09
```

Helpful Hints:

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

Budget Request Menu



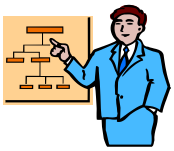
```
MCB0                          COIN BUDGET REQUEST                2009-10-27 10:52
V.10272007 FY: 2010 LOC: 059 OFF: 717 FAIRFAX COUNTY
OFFICE: DIRECTOR OF FINANCE            OFFICER: BRUCE
                              BUDGET REQUEST MENU

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

   2. ADDITIONAL EMPLOYEE REQUEST
   3. TEMPORARY PERSONNEL FUNDING REQUEST
   4. FULL OR PARTIALLY FUNDED PERSONNEL
   5. OFFICE EXPENSE FUNDING
   6. EQUIPMENT (EXCLUDING CLERKS)
   7. RECORD WORKLOAD INFORMATION

   9. SPECIAL PROGRAM CERTIFICATION
  10. CERTIFY BUDGET REQUEST
  11. COMMENTS
  12. COMPENSATION BOARD FUNCTIONS
OPTION __

          F1=HELP          F3=MENU          F4=TOTALS          F12=MAIN
4B                  :00.2                                                22/09
```

Helpful Hints (Continued):

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

Procedures:

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



3. Option #1, Permanent Personnel

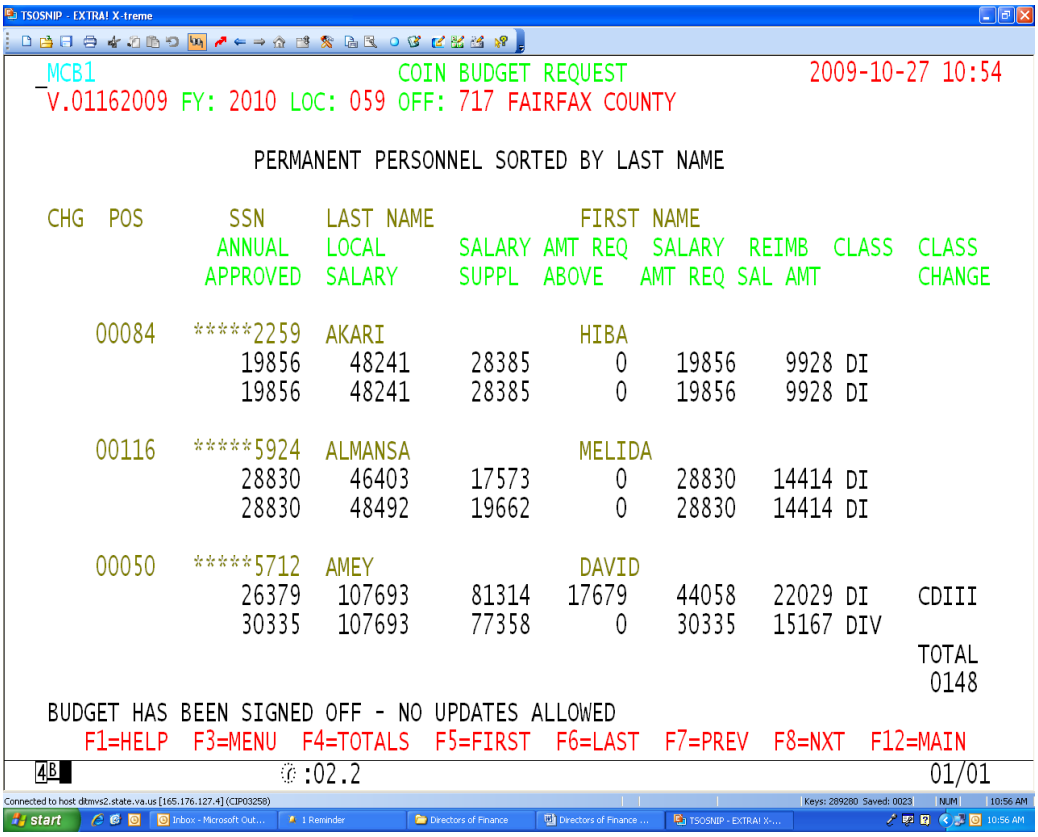
Purpose:

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

Navigational Path:

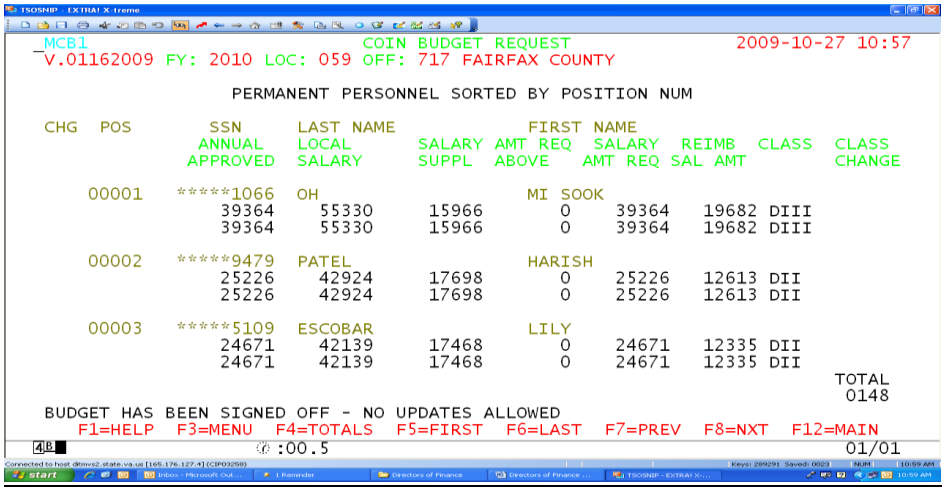
- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #1, Permanent Personnel

DIRECTORS OF FINANCE



```
TSOSNIP - EXTRA! X-treme
_MCB1                          COIN BUDGET REQUEST                2009-10-27 10:54
V.01162009 FY: 2010 LOC: 059 OFF: 717 FAIRFAX COUNTY

                 PERMANENT PERSONNEL SORTED BY LAST NAME

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

     00084  *****2259  AKARI                HIBA
                19856    48241     28385      0    19856    9928 DI
                19856    48241     28385      0    19856    9928 DI

     00116  *****5924  ALMANSA              MELIDA
                28830    46403     17573      0    28830   14414 DI
                28830    48492     19662      0    28830   14414 DI

     00050  *****5712  AMEY                 DAVID
                26379   107693     81314  17679    44058   22029 DI    CDIII
                30335   107693     77358      0    30335   15167 DIV
                                                                      TOTAL
                                                                       0148
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                  :02.2                                              01/01
Connected to host dktmvs2.state.va.us [165.176.127.4] (CIP03258)   Keys: 289280 Saved: 0023   NUM   10:56 AM
start  Inbox - Microsoft Out...  1 Reminder  Directors of Finance  Directors of Finance ...  TSOSNIP - EXTRA! X-...  10:56 AM
```

Option #1, Permanent Personnel



```
_MCB1                          COIN BUDGET REQUEST                    2009-10-27 10:57
V.01162009 FY: 2010 LOC: 059 OFF: 717 FAIRFAX COUNTY

                    PERMANENT PERSONNEL SORTED BY POSITION NUM

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

     00001   *****1066   OH                  MI SOOK
                39364     55330     15966      0    39364   19682 DIII
                39364     55330     15966      0    39364   19682 DIII

     00002   *****9479   PATEL               HARISH
                25226     42924     17698      0    25226   12613 DII
                25226     42924     17698      0    25226   12613 DII

     00003   *****5109   ESCOBAR             LILY
                24671     42139     17468      0    24671   12335 DII
                24671     42139     17468      0    24671   12335 DII
                                                                        TOTAL
                                                                         0148
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                    :00.5                                            01/01
```

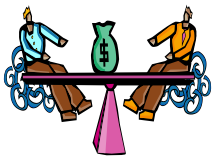
Helpful Hints:

- 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 CB 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 <u>could eliminate</u> 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 the 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 <u>total salary</u> for each position, including the 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 CB Salary gives you amount requested above
Sal Amt Req:	Entered by Officer or Compensation Board
Reimb Sal Amt:	This will appear with the % amount reimbursed.
Class:	Supplied by system
Class Change:	Enter the class you are requesting for a salary alignment for the employee currently in this position. **(Do Not Enter A CB10 For This Request)**

- After all data has been entered on all the Permanent Personnel screens, press the "Enter" key to update
- 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



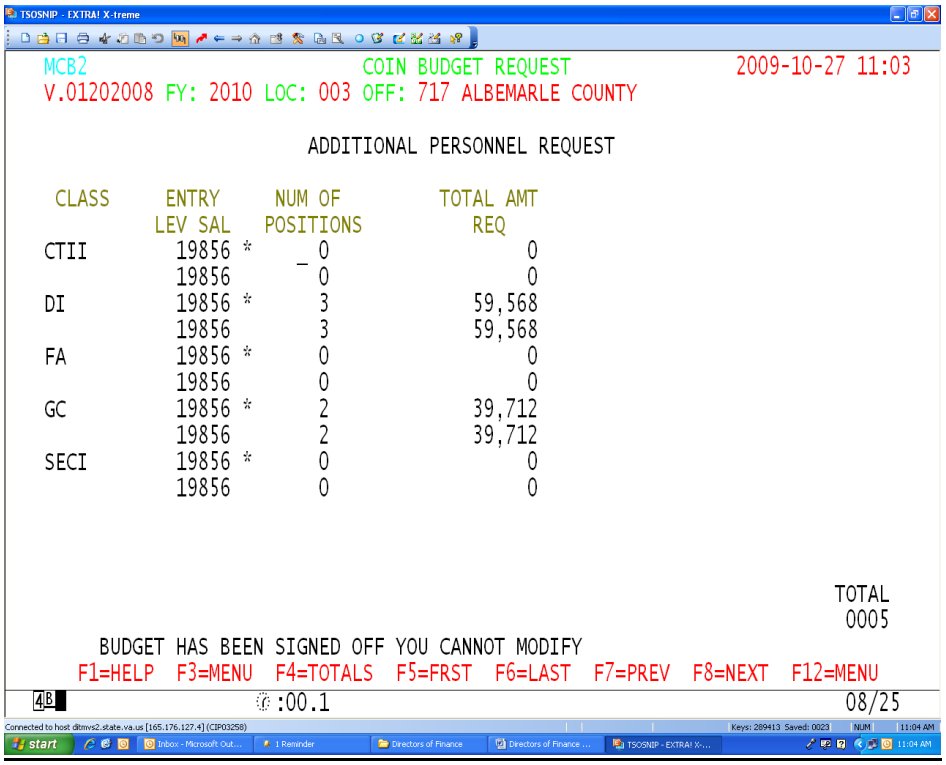
4. Option #2, Additional Personnel Request

Purpose:

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

Navigational Path:

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

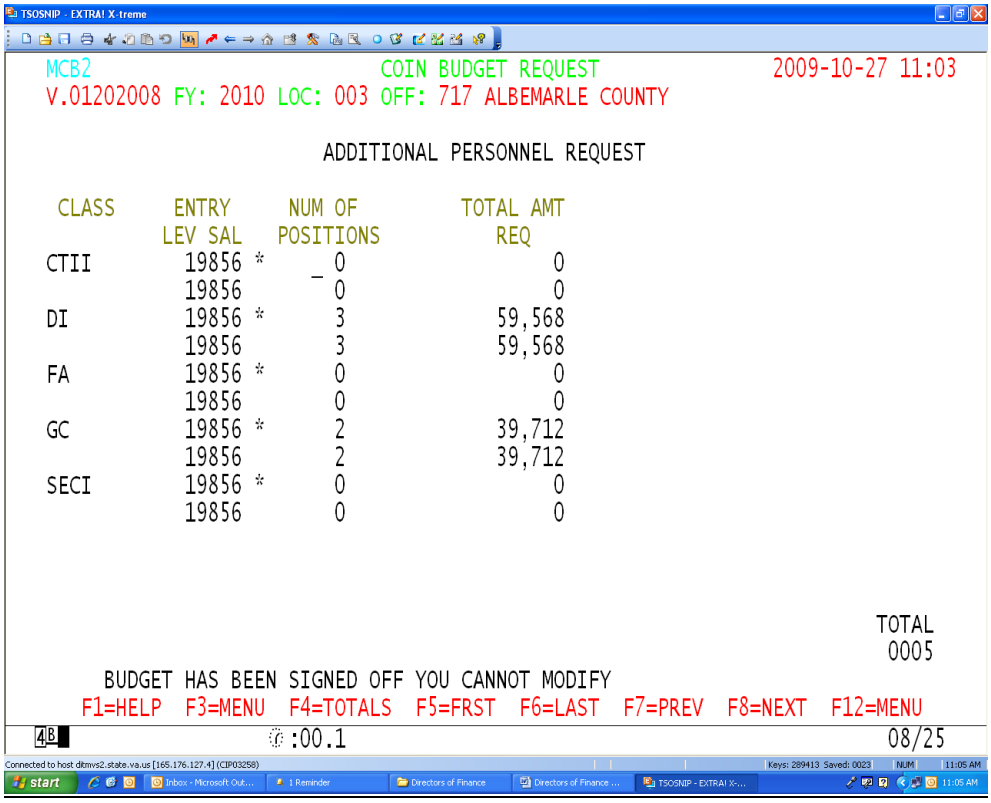


Helpful Hints:

- Complete this section to request additional full-time CB funded positions of a predefined class, or
- Complete this section to request additional full-time CB funded positions other than a predefined class
- Blank data fields (Class, Entry Level Salary and Number of positions) are provided to enter request for Additional Personnel other than pre-listed CB classes and/or salaries
- COIN calculates the total amount for each class based on the number of positions requested
- 'Number of Positions' fields **are required,** you <u>must</u> enter a '0' or the number of additional full-time CB funded positions requested

- Any new positions approved by the General Assembly or any reallocated positions will be allocated by the Compensation Board in FY17, as they were in FY16, 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 scales in the appendix.
Entry Level	Supplied by CB. If the supplied salary is not the salary you wish to request, tab to the blank field under the 'Entry Level' column and enter the salary you wish to request
Number of Positions:	Enter the number of positions you are requesting
Blank Fields (Other)	Enter Class, Salary and number of positions requested

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

5. Option #3, Temporary Personnel Fund Request

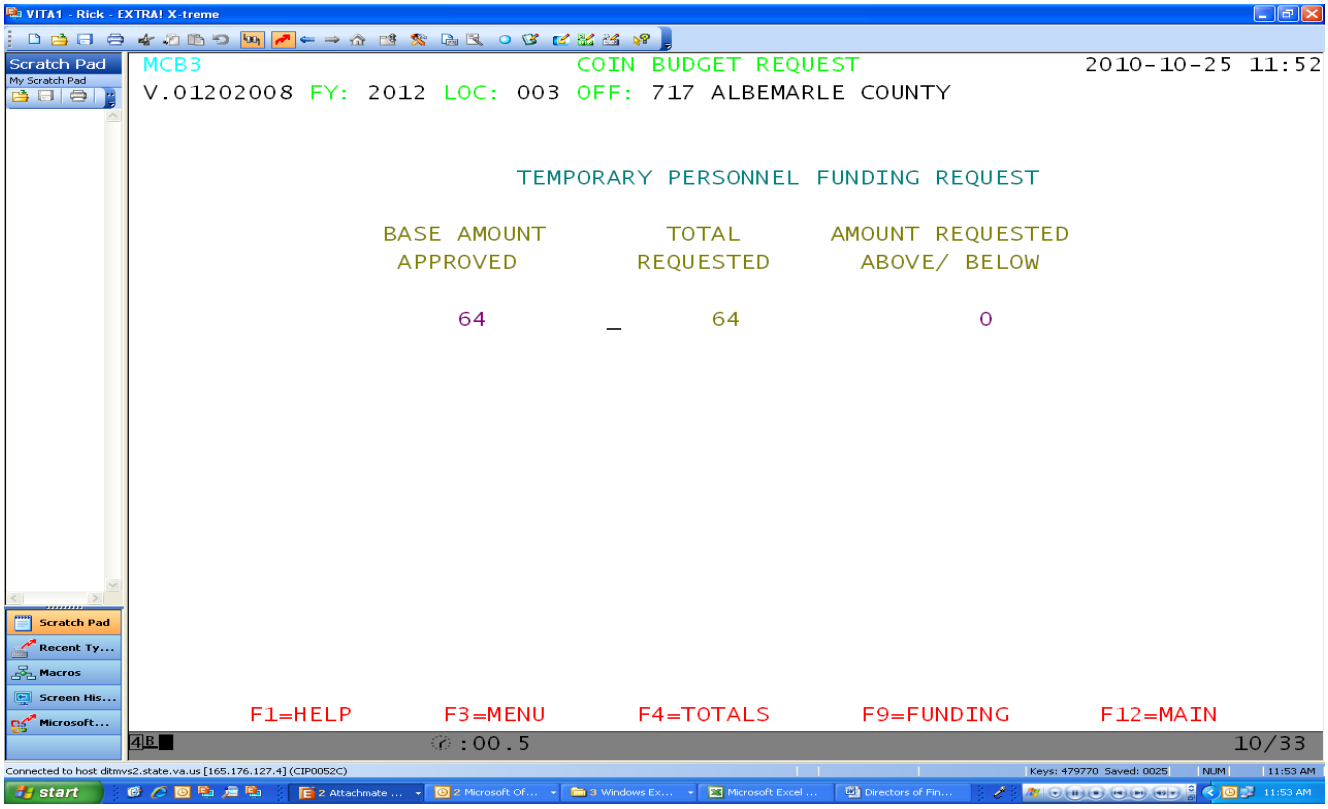
Purpose:

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

DIRECTORS OF FINANCE



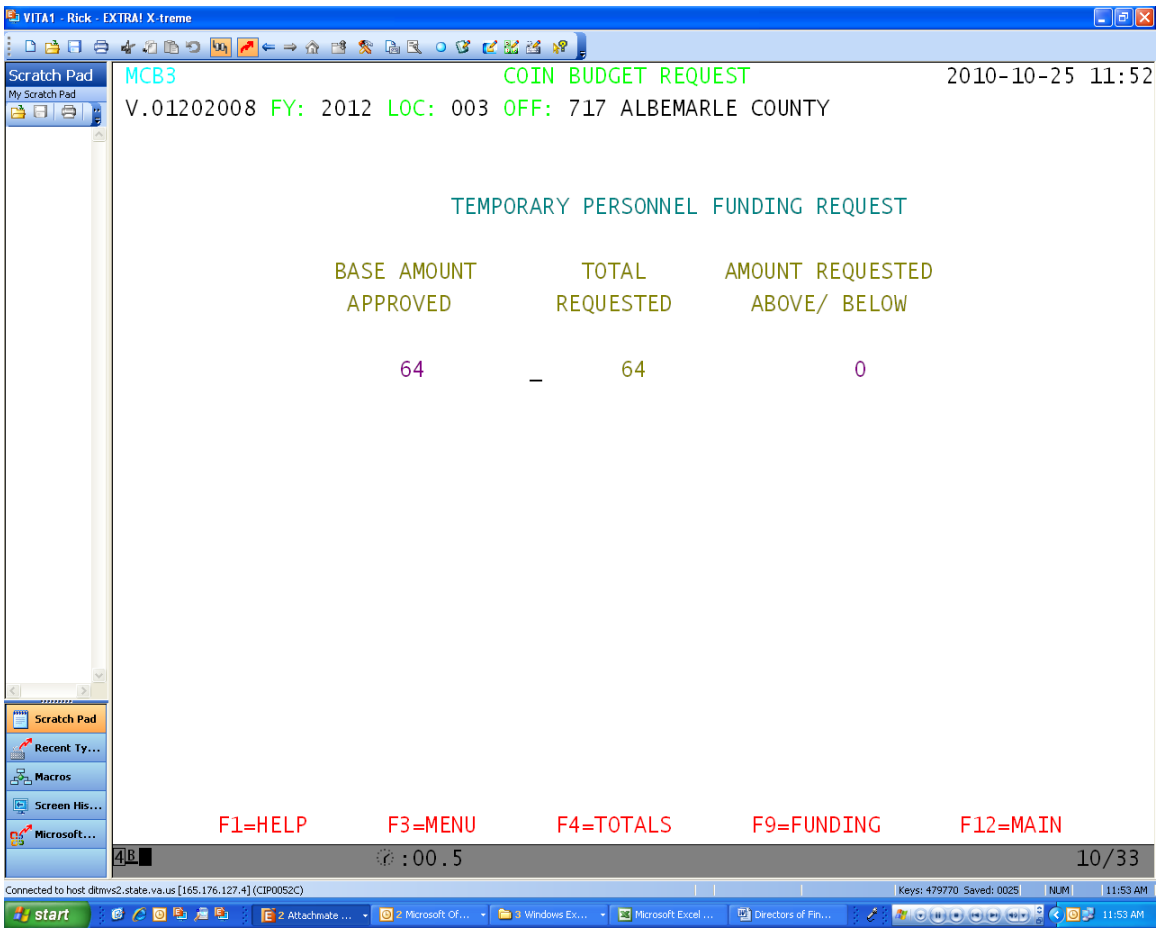
Helpful Hints:

- 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 state that this a Base Budget Adjustment

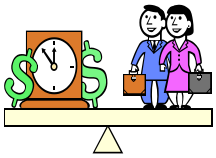
Option #3, Temporary Personnel Fund Request



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

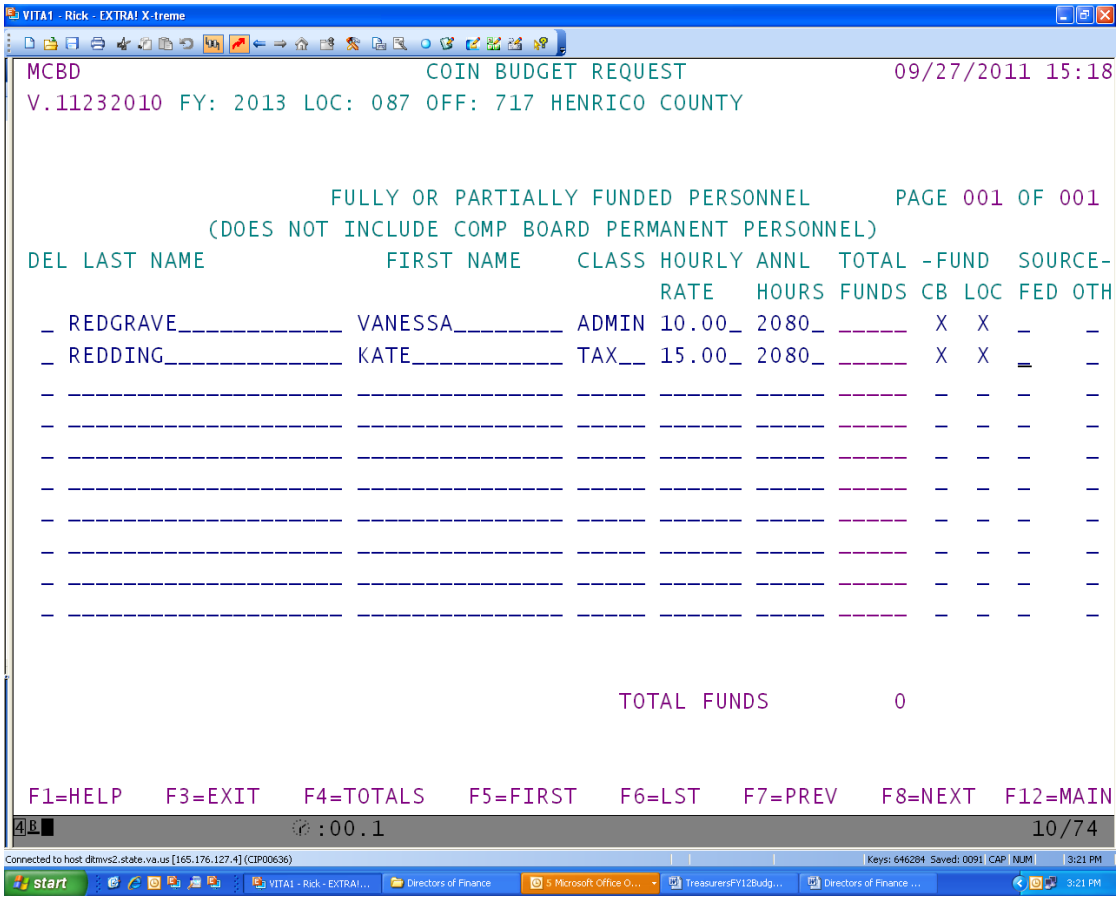
Purpose:

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

DIRECTORS OF FINANCE



```
MCBD                          COIN BUDGET REQUEST                09/27/2011 15:18
V.11232010 FY: 2013 LOC: 087 OFF: 717 HENRICO COUNTY


                     FULLY OR PARTIALLY FUNDED PERSONNEL      PAGE 001 OF 001
             (DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)
DEL LAST NAME             FIRST NAME    CLASS HOURLY ANNL  TOTAL -FUND  SOURCE-
                                              RATE   HOURS FUNDS CB LOC FED OTH
 _ REDGRAVE___________ VANESSA________ ADMIN 10.00_ 2080_ _____  X  X  _    _
 _ REDDING____________ KATE___________ TAX__ 15.00_ 2080_ _____  X  X  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _


                                         TOTAL FUNDS         0


F1=HELP   F3=EXIT   F4=TOTALS   F5=FIRST   F6=LST   F7=PREV   F8=NEXT   F12=MAIN
4B                    :00.1                                                10/74
```

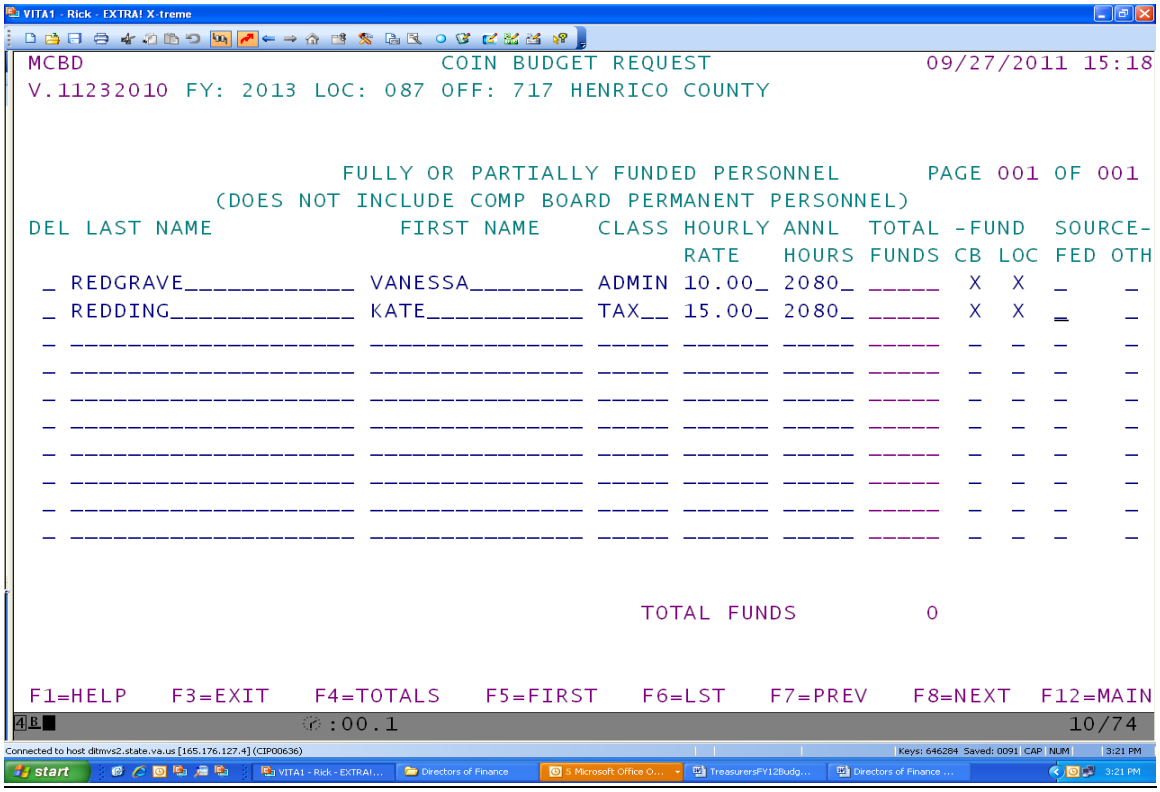
Option #4, Fully Or Partially Funded Positions

```
MCBD                          COIN BUDGET REQUEST                 09/27/2011 15:18
V.11232010 FY: 2013 LOC: 087 OFF: 717 HENRICO COUNTY


                      FULLY OR PARTIALLY FUNDED PERSONNEL       PAGE 001 OF 001
              (DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)
DEL LAST NAME             FIRST NAME    CLASS HOURLY ANNL  TOTAL -FUND  SOURCE-
                                              RATE   HOURS FUNDS CB LOC FED OTH
 _ REDGRAVE___________ VANESSA________ ADMIN 10.00_ 2080_ _____  X  X  _    _
 _ REDDING____________ KATE___________ TAX__ 15.00_ 2080_ _____  X  X  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _


                                         TOTAL FUNDS         0


F1=HELP   F3=EXIT   F4=TOTALS   F5=FIRST   F6=LST   F7=PREV   F8=NEXT   F12=MAIN
4B                        :00.1                                          10/74
```

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

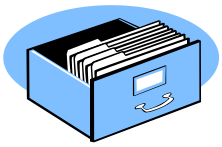


```
MCBD                          COIN BUDGET REQUEST                 09/27/2011 15:18
V.11232010 FY: 2013 LOC: 087 OFF: 717 HENRICO COUNTY


                      FULLY OR PARTIALLY FUNDED PERSONNEL       PAGE 001 OF 001
              (DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)
DEL LAST NAME             FIRST NAME    CLASS HOURLY ANNL  TOTAL -FUND  SOURCE-
                                              RATE   HOURS FUNDS CB LOC FED OTH
 _ REDGRAVE___________ VANESSA________ ADMIN 10.00_ 2080_ _____  X  X  _    _
 _ REDDING____________ KATE___________ TAX__ 15.00_ 2080_ _____  X  X  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ___________________ _______________ _____ ______ _____ _____  _  _  _    _


                                         TOTAL FUNDS         0


 F1=HELP    F3=EXIT    F4=TOTALS    F5=FIRST    F6=LST    F7=PREV    F8=NEXT   F12=MAIN
                          :00.1                                          10/74
```

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 <u>annually</u>
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

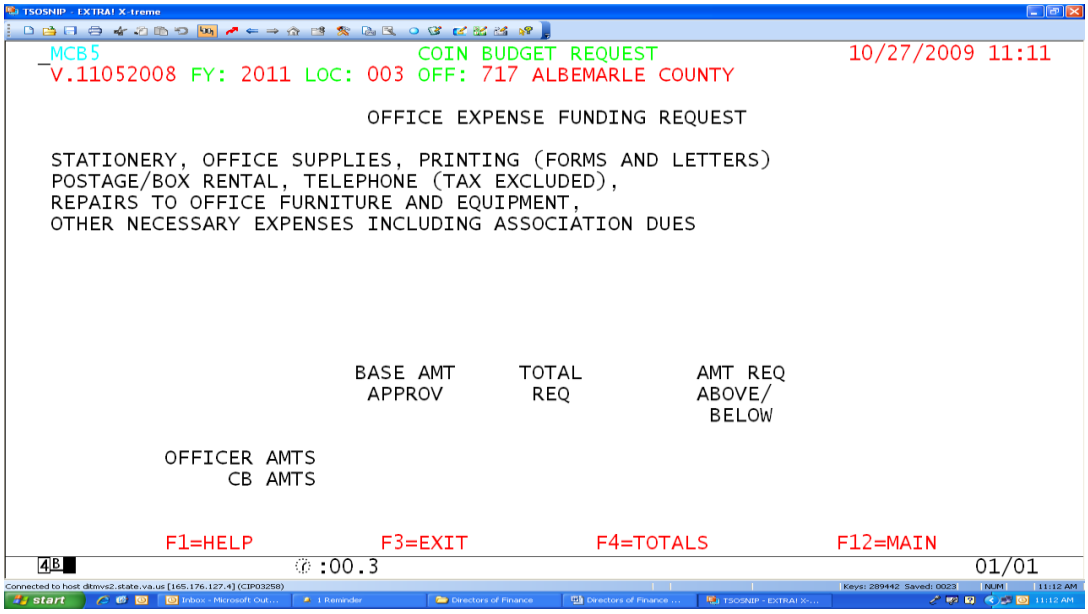
Purpose:

Office Expense Funding Request 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

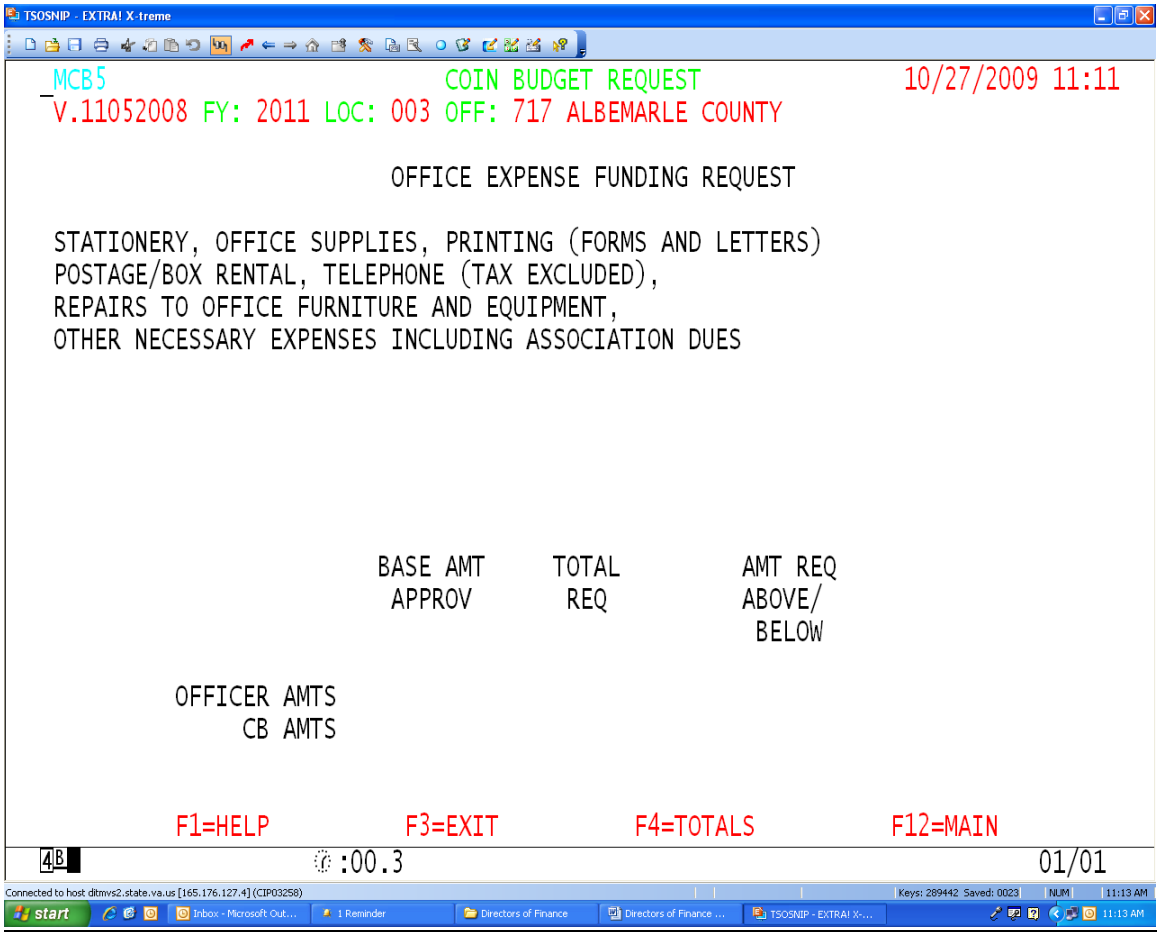
DIRECTORS OF FINANCE



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 CB approved minutes for changes affecting the base budget.

Option #5, Office Expense Funding



Procedures:

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

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

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

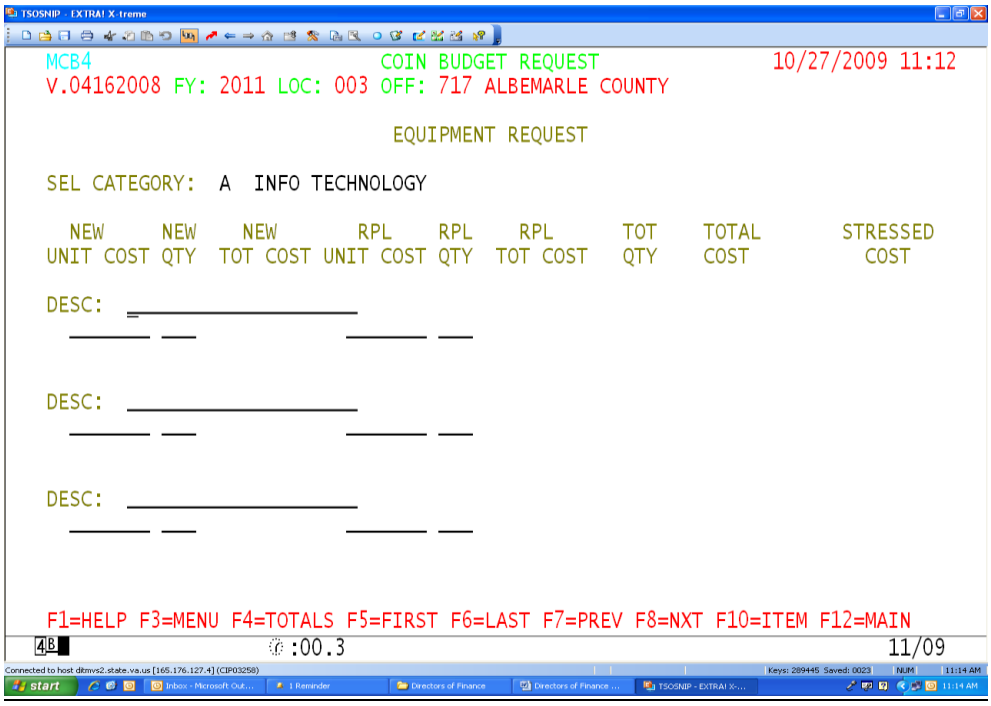
8. Option #6, Equipment

Purpose:

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:

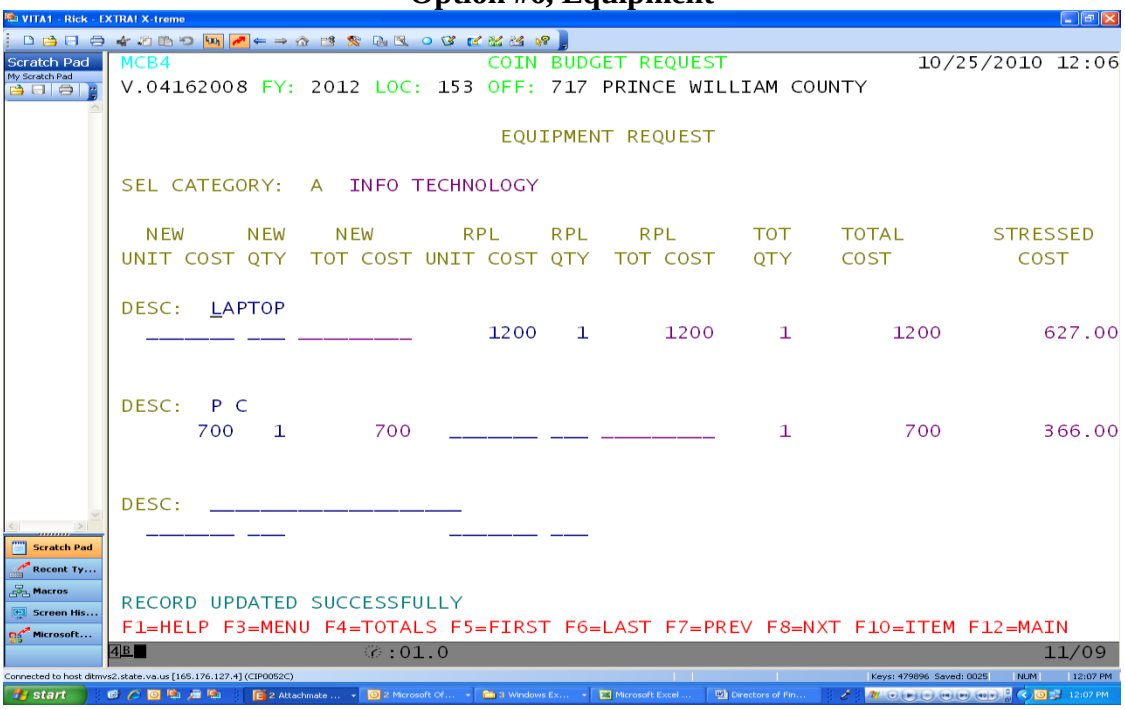
- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #6, Equipment



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'

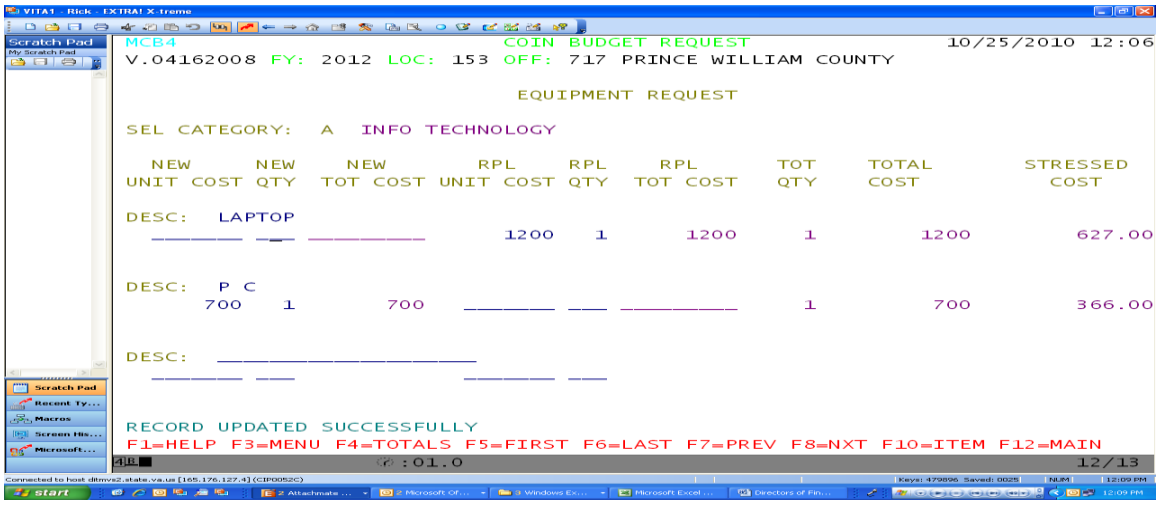
DESC:	List requested equipment or utilize the 'F1' help function	
New Unit Cost:	Enter unit cost of the new equipment requested	
New Qty:	Enter the quantity here, if this is New equipment not presently owned	
New Total Cost:	Calculated	
RPL Unit Cost:	Enter unit cost of the replacement equipment requested	
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 required 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

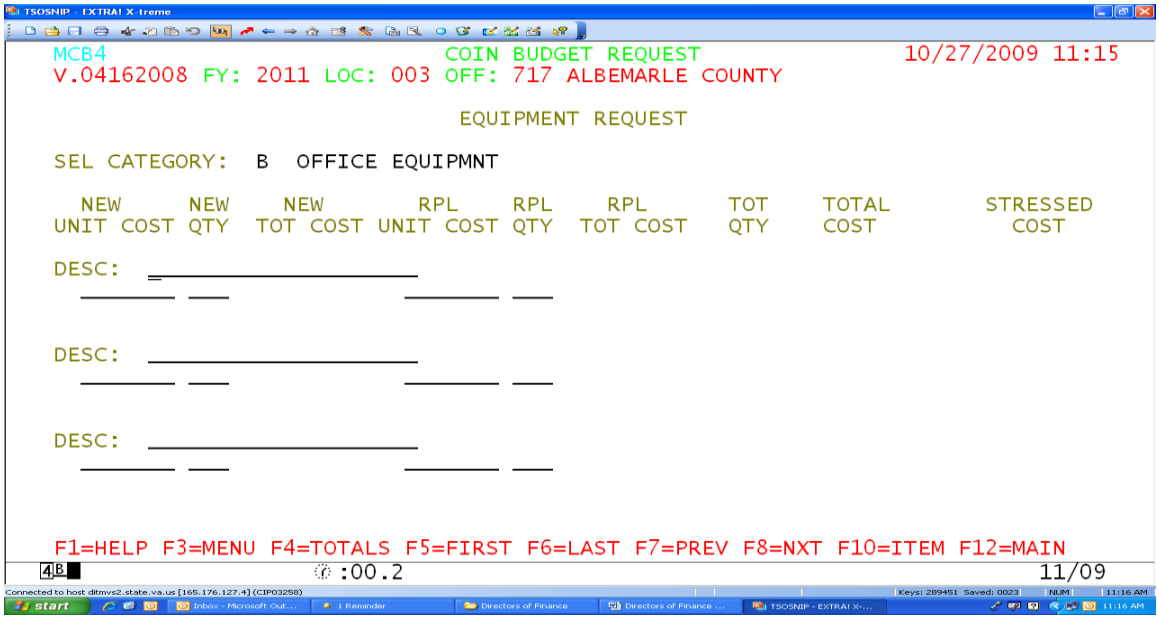
Option #6, Equipment

DIRECTORS OF FINANCE

Category A – Information Technology (It) Equipment



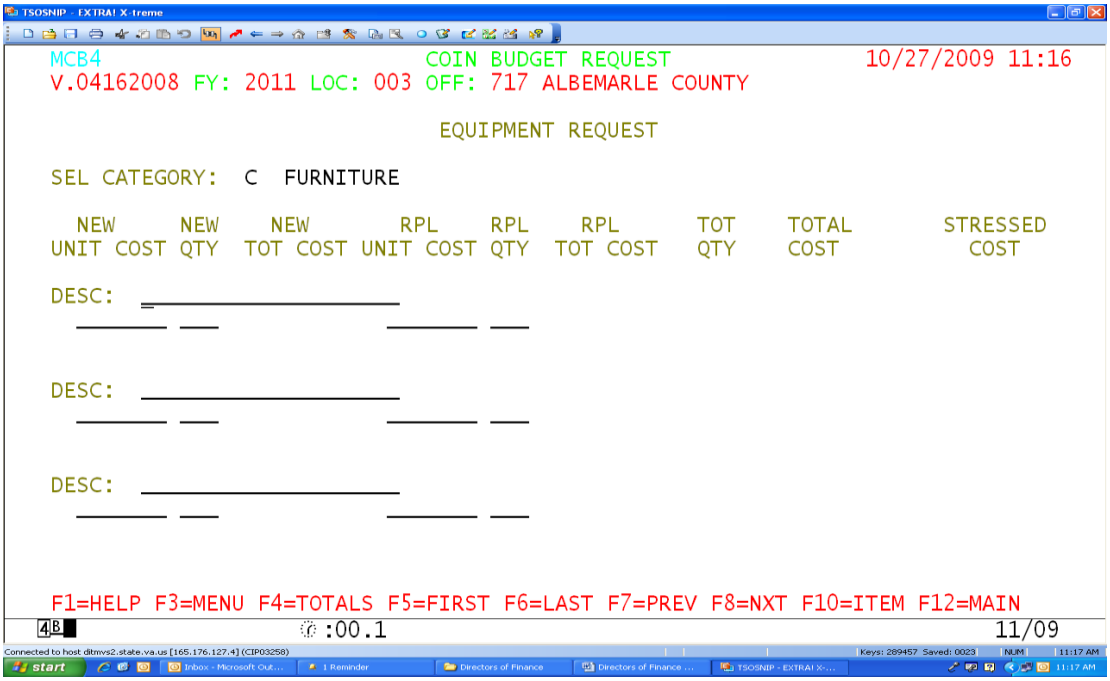
Category B – Office Equipment



Option #6, Equipment

DIRECTORS OF FINANCE

Category C – Furniture Equipment



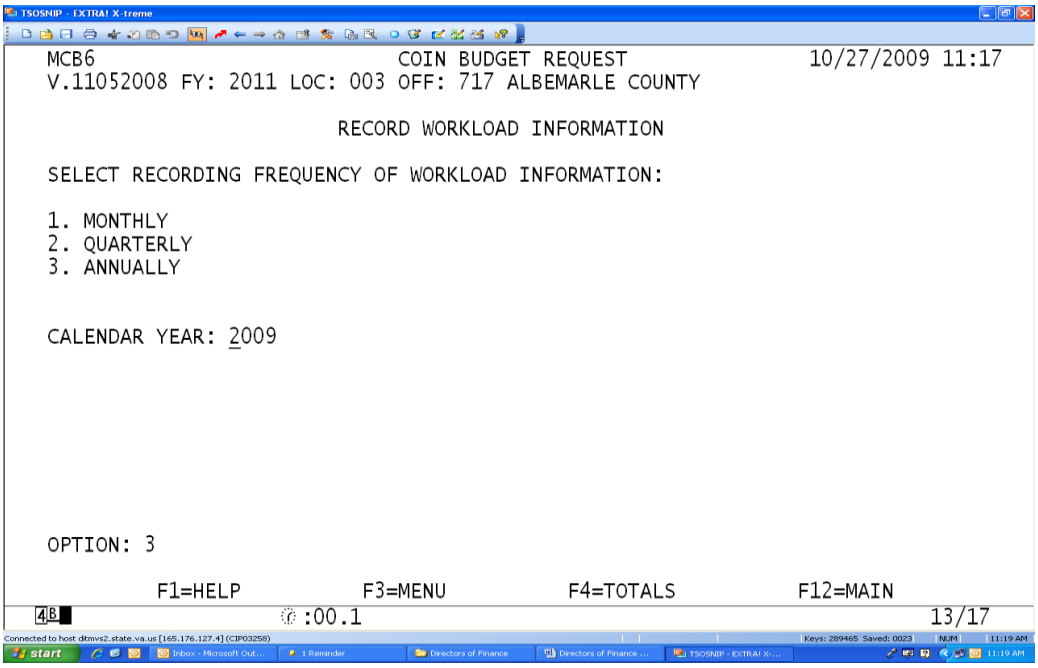
9. Option #7, Record Workload Information

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



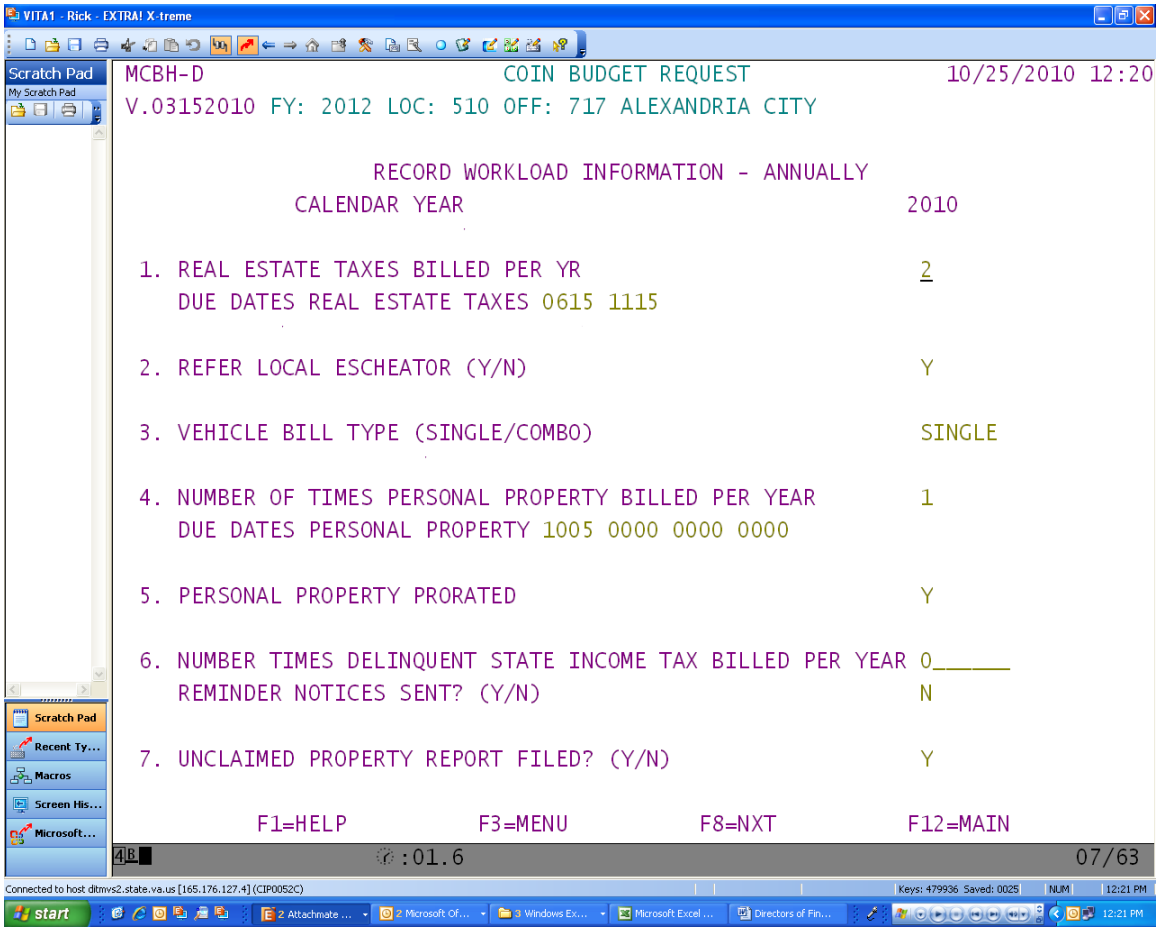
- In January 2016 offices must record one full year of workload data for Calendar Year (CY) 2015
- Provide requested information in accordance with Section 15.2-1636.7, Code of Virginia. Information requested is based **on the most recent calendar year**
- Select 'Option 3' and press the "Enter" key 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 11

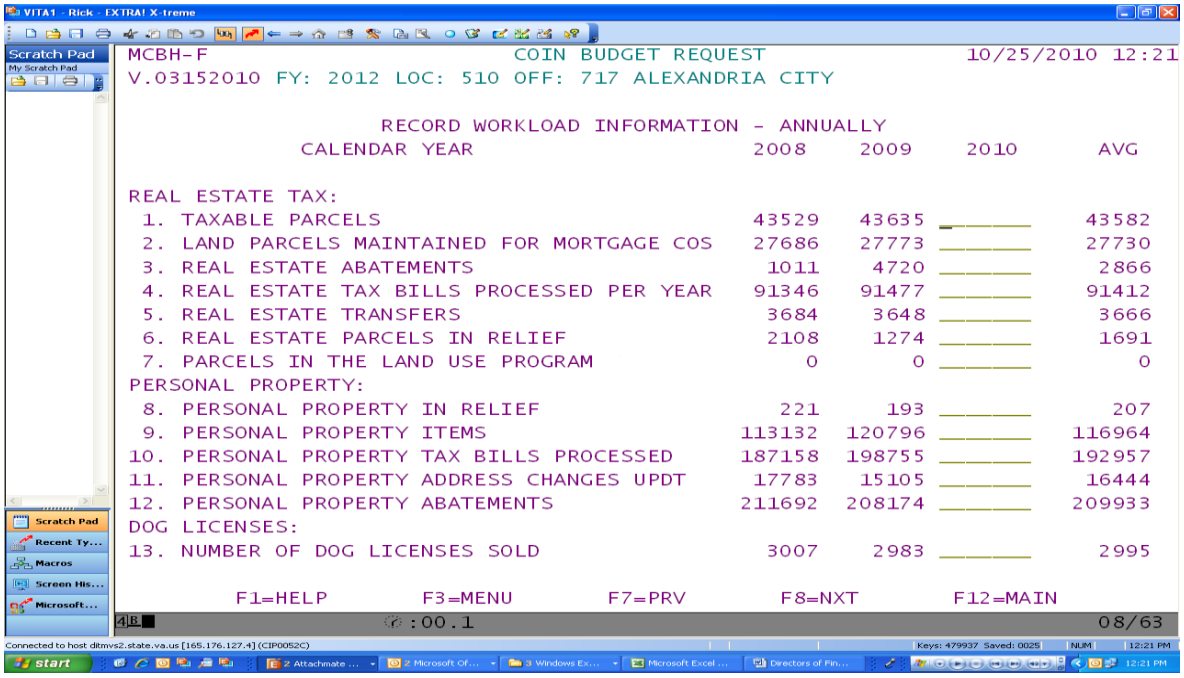


1. Enter the number of times per year Real Estate Taxes are billed and the month and year of the due date(s) (For example, February 2015 would be entered as '0215')
2. Enter 'Y' or 'N' for Refer Local Escheator
3. Enter the type of vehicle bill (either single or combo)
4. Enter the number of times per year Personal Property Taxes are billed and month and year of the due date(s) (For example, February 2015 would be entered as '0215')
5. Enter 'Y' or 'N' for Prorated Personal Property Tax
6. Enter the number of times per year Delinquent State Income Tax is billed and 'Y' or 'N' for Reminder Notices sent
7. Enter 'Y' or 'N' for Unclaimed Property Report Filed

Option #7 Record Workload Information

Option #3 Annual Screens

Screen 2 of 11



```
MCBH-F                          COIN BUDGET REQUEST                 10/25/2010 12:21
V.03152010 FY: 2012 LOC: 510 OFF: 717 ALEXANDRIA CITY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2008    2009    2010      AVG

REAL ESTATE TAX:
 1. TAXABLE PARCELS                                43529   43635 ______    43582
 2. LAND PARCELS MAINTAINED FOR MORTGAGE COS       27686   27773 ______    27730
 3. REAL ESTATE ABATEMENTS                          1011    4720 ______     2866
 4. REAL ESTATE TAX BILLS PROCESSED PER YEAR       91346   91477 ______    91412
 5. REAL ESTATE TRANSFERS                           3684    3648 ______     3666
 6. REAL ESTATE PARCELS IN RELIEF                   2108    1274 ______     1691
 7. PARCELS IN THE LAND USE PROGRAM                    0       0 ______        0
PERSONAL PROPERTY:
 8. PERSONAL PROPERTY IN RELIEF                      221     193 ______      207
 9. PERSONAL PROPERTY ITEMS                       113132  120796 ______   116964
10. PERSONAL PROPERTY TAX BILLS PROCESSED         187158  198755 ______   192957
11. PERSONAL PROPERTY ADDRESS CHANGES UPDT         17783   15105 ______    16444
12. PERSONAL PROPERTY ABATEMENTS                  211692  208174 ______   209933
DOG LICENSES:
13. NUMBER OF DOG LICENSES SOLD                     3007    2983 ______     2995

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

Real Estate:

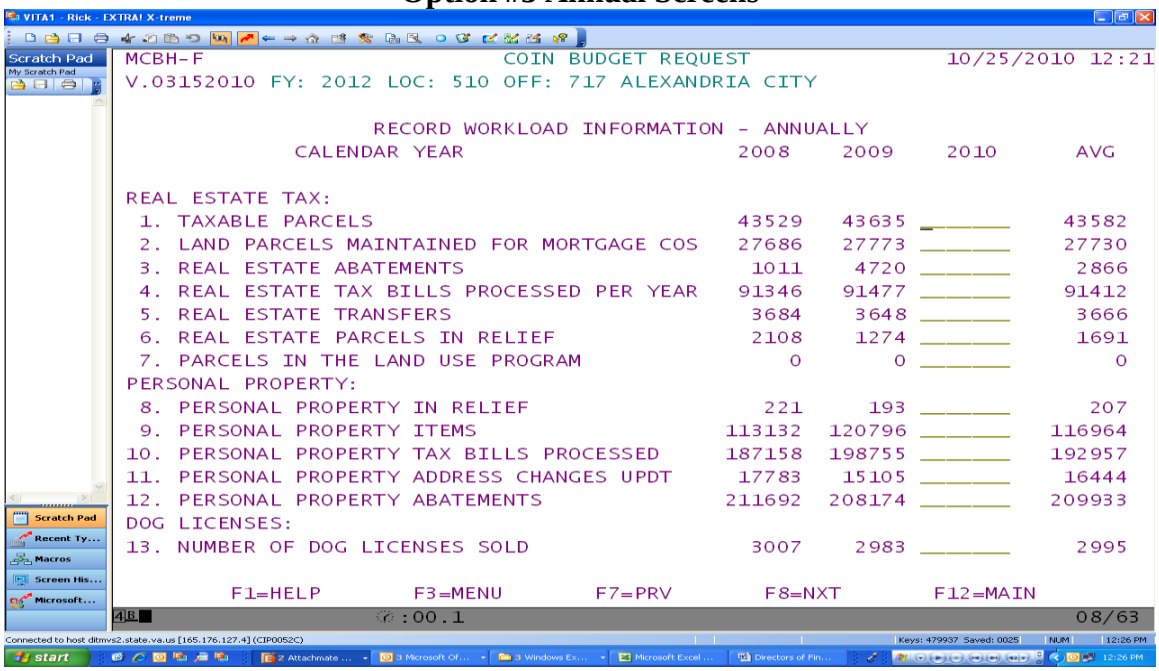
1. ***NUMBER OF TAXABLE PARCELS:*** If your office handles the collection of real estate, enter the total number of parcels of taxable real estate.

INCLUDE:
Parcels billed on the regular book, Supplements, Roll back assessments on land use.
DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of real estate ENTER '0'.

2. ***NUMBER OF PARCELS MAINTAINED FOR MORTGAGE COMPANIES***: If your office handles the collection of real estate, enter the total number of parcels that you maintain for mortgage companies. This includes the accounts that are maintained on the computer and processed by tape and those that are manually processed for the mortgage companies.
3. ***NUMBER OF REAL ESTATE ABATEMENTS***: If your office handles the collection of real estate, enter the total number of parcels adjusted during the year.
4. ***NUMBER OF REAL ESTATE TAX BILLS PROCESSED PER YEAR***: If your office handles the collection of real estate, enter the total number of real estate tax bills mailed by your office. INCLUDE the regular book, semi-annual billing, supplements, and bills resulting from new construction. If your office DOES NOT handle the collection of real estate ENTER '0'.
5. ***NUMBER OF REAL ESTATE TRANSFERS***: If your office handles the collection of real estate, enter the number of parcels transferred for the year. If your office DOES NOT handle the collection of real estate ENTER '0'.
6. ***NUMBER OF REAL ESTATE PARCELS IN RELIEF TO THE ELDERLY/DISABLED PROGRAM***: If your office handles the collection of real estate, enter the total number of parcels with a tax adjustment due to participation in the elderly/disabled program. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of real estate ENTER '0'

Option #7 Record Workload Information

Option #3 Annual Screens



```
MCBH-F                          COIN BUDGET REQUEST                 10/25/2010 12:21
V.03152010 FY: 2012 LOC: 510 OFF: 717 ALEXANDRIA CITY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2008    2009    2010      AVG

REAL ESTATE TAX:
 1. TAXABLE PARCELS                                43529   43635 _______    43582
 2. LAND PARCELS MAINTAINED FOR MORTGAGE COS       27686   27773 _______    27730
 3. REAL ESTATE ABATEMENTS                          1011    4720 _______     2866
 4. REAL ESTATE TAX BILLS PROCESSED PER YEAR       91346   91477 _______    91412
 5. REAL ESTATE TRANSFERS                           3684    3648 _______     3666
 6. REAL ESTATE PARCELS IN RELIEF                   2108    1274 _______     1691
 7. PARCELS IN THE LAND USE PROGRAM                    0       0 _______        0
PERSONAL PROPERTY:
 8. PERSONAL PROPERTY IN RELIEF                      221     193 _______      207
 9. PERSONAL PROPERTY ITEMS                       113132  120796 _______   116964
10. PERSONAL PROPERTY TAX BILLS PROCESSED         187158  198755 _______   192957
11. PERSONAL PROPERTY ADDRESS CHANGES UPDT         17783   15105 _______    16444
12. PERSONAL PROPERTY ABATEMENTS                  211692  208174 _______   209933
DOG LICENSES:
13. NUMBER OF DOG LICENSES SOLD                     3007    2983 _______     2995

        F1=HELP        F3=MENU        F7=PRV        F8=NXT        F12=MAIN
4B                        :00.1                                          08/63
```

7. ***NUMBER OF PARCELS IN THE LAND USE PROGRAM***: If your office handles the collection of real estate, enter the total number of parcels with a tax adjustment due to participation in the land use program. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of real estate ENTER '0'.

Personal Property:

8. ***NUMBER OF PERSONAL PROPERTY ITEMS IN RELIEF TO THE ELDERLY/DISABLED PROGRAM***: If your office handles the collection of personal property, enter the total number of personal property items with a tax adjustment due to participation in the elderly/disabled program. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of personal property, ENTER '0'.
9. ***NUMBER OF ITEMS ON WHICH PERSONAL PROPERTY TAX IS ASSESSED EACH YEAR***: If your office handles the collection of personal property, include the total number of items of personal property assessed. Count each separate motor vehicle, trailer, boat and motor, camper, travel trailer, aircraft, mobile home and each assessment of machinery and tools, business personal property, and farm accounts that are assessed. Each item is a separate count. (If you bill on a combined bill you may have to verify this number with your Commissioner of the Revenue – This should equal the total of factors #4, #5, and #6 on the workload study for the Commissioner) INCLUDE regular assessments as determined above for the year and all supplemental assessments. DO NOT multiply this figure by any factor if you prorate or bill more than once a year. If your office DOES NOT handle the collection of personal property, ENTER '0'.
10. ***NUMBER OF PERSONAL PROPERTY TAX BILLS PROCESSED PER YEAR***: If your office handles the collection of personal property, enter the total number of personal property tax bills mailed by your office. INCLUDE the regular book, semi-annual billing, supplements, and bills resulting from proration. If your office DOES NOT handle the collection of personal property ENTER '0'.
11. ***NUMBER OF PERSONAL PROPERTY ADDRESS CHANGES UPDATED***: If your office handles personal property address changes, enter the total number of addresses updated during the year. INCLUDE the total number of addresses updated based on your "skip-tracing" efforts. If your office DOES NOT handle the updating of addresses, ENTER '0'.
12. ***NUMBER OF PERSONAL PROPERTY ABATEMENTS***: If your office handles the collection of personal property, enter the total number of personal property items adjusted during the year. INCLUDE the total number of refunds or adjustments to accounts resulting from proration of personal property taxes.

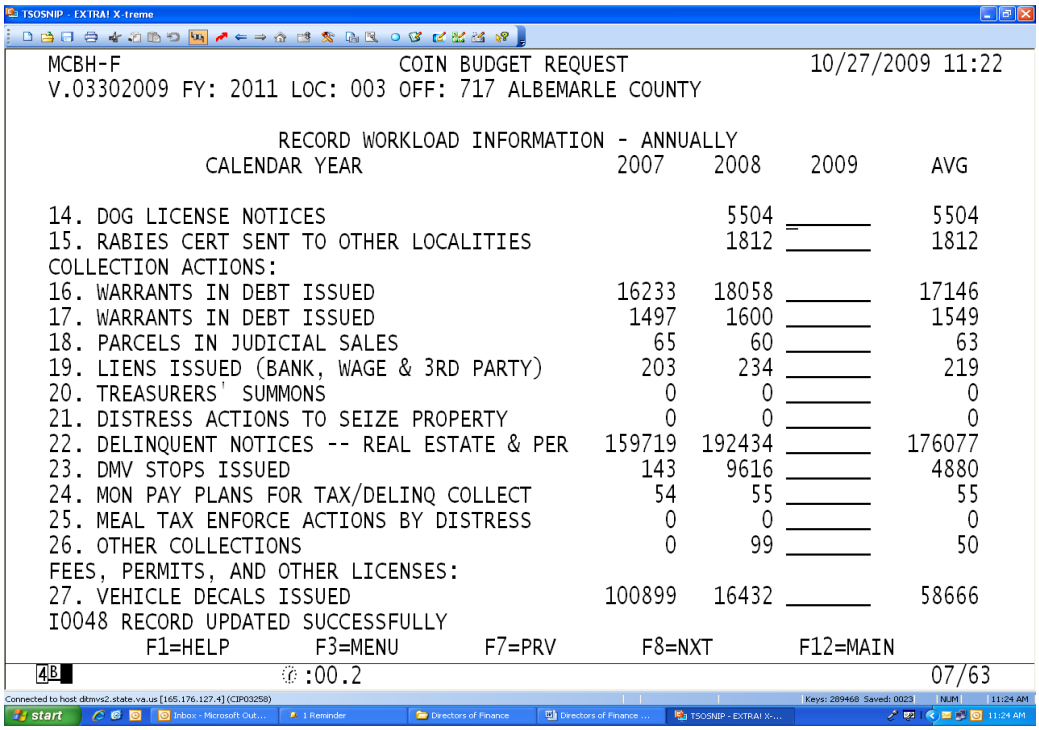
Dog Licenses:

13. ***NUMBER OF DOG LICENSES SOLD:*** Enter the total number of licenses issued during the year.

Option #7 Record Workload Information

Option #3 Annual Screens

Screen 3 of 11



```
MCBH-F                        COIN BUDGET REQUEST                10/27/2009 11:22
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

14. DOG LICENSE NOTICES                                5504 _______      5504
15. RABIES CERT SENT TO OTHER LOCALITIES               1812 _______      1812
COLLECTION ACTIONS:
16. WARRANTS IN DEBT ISSUED                       16233   18058 _______    17146
17. WARRANTS IN DEBT ISSUED                        1497    1600 _______     1549
18. PARCELS IN JUDICIAL SALES                        65      60 _______       63
19. LIENS ISSUED (BANK, WAGE & 3RD PARTY)           203     234 _______      219
20. TREASURERS' SUMMONS                               0       0 _______        0
21. DISTRESS ACTIONS TO SEIZE PROPERTY                0       0 _______        0
22. DELINQUENT NOTICES -- REAL ESTATE & PER      159719  192434 _______   176077
23. DMV STOPS ISSUED                                143    9616 _______     4880
24. MON PAY PLANS FOR TAX/DELINQ COLLECT             54      55 _______       55
25. MEAL TAX ENFORCE ACTIONS BY DISTRESS              0       0 _______        0
26. OTHER COLLECTIONS                                 0      99 _______       50
FEES, PERMITS, AND OTHER LICENSES:
27. VEHICLE DECALS ISSUED                        100899   16432 _______    58666
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP       F3=MENU       F7=PRV       F8=NXT       F12=MAIN
4B                    :00.2                                            07/63
```

14. ***DOG LICENSE NOTICES***: Enter the number of dog license notices processed (Include dog tag renewal forms sent)
15. ***RABIES CERTIFICATES SENT TO OTHER LOCALITES***: Enter the number of rabies certificates that were sent to other localities.

Collection Actions:

16. ***NUMBER OF ACCOUNTS IN DEBT SET OFF PROGRAM BASED ON NUMBER OF CLAIMS FILED***
17. ***NUMBER OF WARRANTS IN DEBT ISSUED***
18. ***NUMBER OF PARCELS IN JUDICIAL SALE PROCEEDINGS***
19. ***NUMBER OF LIENS ISSUED (INCLUDES BANK, WAGE, AND OTHER THIRD PARTY LIENS)***
20. ***NUMBER OF TREASURERS' SUMMONS***
21. ***NUMBER OF DISTRESS ACTIONS TO SEIZE PROPERTY***
22. ***TOTAL OF DELINQUENT NOTICES FOR REAL ESTATE AND PERSONAL PROPERTY***
23. ***NUMBER OF DMV STOPS ISSUED***
24. ***NUMBER OF MONTHLY PAYMENT PLANS MAINTAINED FOR PREPAYMENT OF TAXES AND DELINQUENT COLLECTIONS (INCLUDE ACH PAYMENTS)***
25. ***NUMBER OF MEALS TAX ENFORCEMENT ACTIONS BY DISTRESS***
26. ***NUMBER OF OTHER COLLECTIONS***

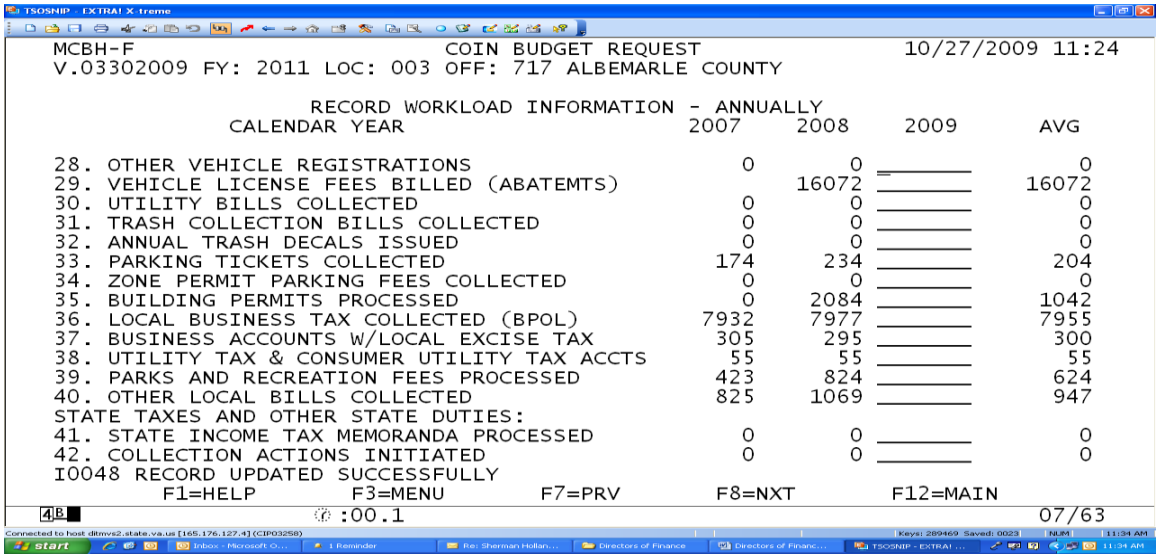
Fees, Permits & Other Licenses

27. ***NUMBER OF VEHICLE DECALS ISSUED (INCLUDE ABATEMENTS***: Enter total number of licenses issued during the year.

Option #7 Record Workload Information

Option #3 Annual Screens

Screen 4 of 11



```
MCBH-F                        COIN BUDGET REQUEST                 10/27/2009 11:24
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007     2008     2009       AVG

28. OTHER VEHICLE REGISTRATIONS                       0        0 _______         0
29. VEHICLE LICENSE FEES BILLED (ABATEMTS)                 16072 _______     16072
30. UTILITY BILLS COLLECTED                           0        0 _______         0
31. TRASH COLLECTION BILLS COLLECTED                  0        0 _______         0
32. ANNUAL TRASH DECALS ISSUED                        0        0 _______         0
33. PARKING TICKETS COLLECTED                       174      234 _______       204
34. ZONE PERMIT PARKING FEES COLLECTED                0        0 _______         0
35. BUILDING PERMITS PROCESSED                        0     2084 _______      1042
36. LOCAL BUSINESS TAX COLLECTED (BPOL)            7932     7977 _______      7955
37. BUSINESS ACCOUNTS W/LOCAL EXCISE TAX            305      295 _______       300
38. UTILITY TAX & CONSUMER UTILITY TAX ACCTS         55       55 _______        55
39. PARKS AND RECREATION FEES PROCESSED             423      824 _______       624
40. OTHER LOCAL BILLS COLLECTED                     825     1069 _______       947
STATE TAXES AND OTHER STATE DUTIES:
41. STATE INCOME TAX MEMORANDA PROCESSED              0        0 _______         0
42. COLLECTION ACTIONS INITIATED                      0        0 _______         0
I0048 RECORD UPDATED SUCCESSFULLY
      F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                  :00.1                                          07/63
```

- ***28.*** ***NUMBER OF OTHER VEHICLES***: Enter total number of scooter or moped registrations issued during the year.
- ***29.*** ***NUMBER OF VEHICLE FEES BILLED***: Enter total number of vehicle licenses that were assessed during the year.
- ***30.*** ***NUMBER OF UTILITY BILLS COLLECTED***: Enter total number of water, sewer, and other municipal utility bills collected during the year.
- ***31.*** ***NUMBER OF TRASH COLLECTION BILLS COLLECTED***: Enter total number of trash collection bills processed during the year.
- ***32.*** ***NUMBER OF ANNUAL TRASH DECALS ISSUED***: Enter total number of trash decals or stickers issued during the year.
- ***33.*** ***NUMBER OF PARKING TICKETS COLLECTED***: Enter total number of parking tickets collected during the year.
- ***34.*** ***NUMBER OF ZONE PERMIT PARKING FEES COLLECTED***: Enter total number of zone permit parking fees collected during the year.
- ***35.*** ***NUMBER OF BUILDING PERMITS PROCESSED***: Enter total number of permits collected during the year.
- ***36.*** ***NUMBER OF LOCAL BUSINESSES ON WHICH LICENSE TAX IS COLLECTED (BPOL)***: Enter the total number of businesses from whom you collect a license tax.
- ***37.*** ***NUMBER OF BUSINESS ACCOUNTS ON WHICH LOCAL EXCISE TAX IS COLLECTED***: Enter the total number of meals tax, admissions, cigarette, lodging and other local excise tax accounts from whom you collect a excise tax.
- ***38.*** ***NUMBER OF UTILITY TAX AND CONSUMER UTILITY TAX ACCOUNTS***: Enter the total number of utility and consumer utility tax accounts collected annually. INCLUDE consumer utility and local consumption.
- ***39.*** ***NUMBER OF PARKS AND RECREATION FEES PROCESSED***: Enter total number of transactions processed for parks and recreation activities.
- ***40.*** ***NUMBER OF OTHER LOCAL BILLS COLLECTED***: Enter total number of other local billings invoiced and collected during the year. Examples include stormwater management fees, library fines, EMS billing, false alarm fees, and charges for property damage.

State Income Tax and Other State Duties:

- ***41.*** ***NUMBER OF STATE INCOME TAX MEMORANDA RECEIVED/PROCESSED***: Enter the number of state income tax memoranda received and processed from the Commissioner of Revenue during the year. INCLUDE those that are paid in full and those with a balance due.
- ***42.*** ***NUMBER OF COLLECTION ACTIONS INITIATED AGAINST STATE INCOME TAX RETURNS***: Enter the total of all collection actions initiated against state income tax accounts. Include warrants issued, tax liens, and all delinquent notices sent for outstanding state income taxes.

Option #7 Record Workload Information

Option #3 Annual Screens

Screen 5 of 11

```
MCBH-F                          COIN BUDGET REQUEST                10/27/2009 11:35
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

43. ESTIMATED TAX ACCOUNTS                          0       0 _______        0
44. ESTIMATED TAX PAYMENTS                        107     100 _______      104
45A. NUMBER OF TITLES PROCESSED FOR DMV             0       0 _______        0
46. NUM OF TRANS W/FEES COLLECTED FOR DMV           0       0 _______        0
FINANCIAL MANAGEMENT:
47. NUMBER CHECKS/ACH ISSUED                   103277  102317 _______   102797
48. RETURNED CHECKS                               513     561 _______      537
49. PREPARATION PAYROLL AND ADMINISTRATION       3580    3777 _______     3679
50. BANKRUPTCY CLAIMS FILED                        40      90 _______       65
ADJUSTMENTS:
 1.A. TAX ASSESSMENTS ADJUSTED                   1818    1670 _______     1744
 1.B. BUSINESS LICENSE ASSESSMENTS ADJ            397     415 _______      406
 1.C. PERSONAL PROPERTY ASSESSEMENTS ADJ        17044   19336 _______    18190
 1.D. BUSINESS PERS PROP ASSESSMENTS ADJ         2321    2450 _______     2386
 1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ            0       0 _______        0
 1.F. MACHINERY & TOOLS ASSESSMENTS ADJ             6      11 _______        9
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                  :00.1                                          07/63
```

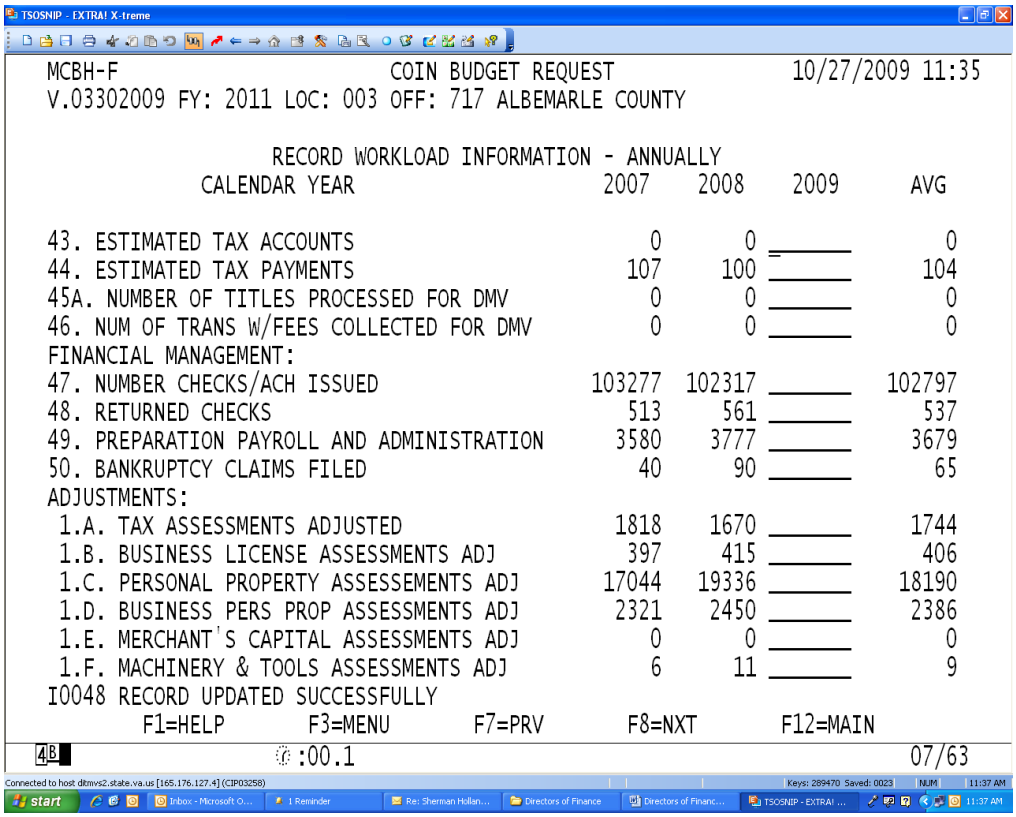
43. ***NUMBER OF ACCOUNTS MAINTAINED ON ESTIMATED STATE INCOME TAX RETURNS***: Enter the total number of accounts maintained on estimated state income tax returns. Include both filed with the Commissioner of the Revenue and accounts not filed.
44. ***NUMBER OF ESTIMATED STATE INCOME TAX PAYMENTS COLLECTED***: Enter the total number of payments received in your office during the year. In theory, 4 payments should be collected on each assessment received from the Commissioner of the Revenue that you maintain. Also include the total of payments received on accounts not filed with the Commissioner but processed by your office.
45. ***NUMBER OF TITLES PROCESSED FOR DMV AS A DMV LICENSING AGENT***: *If your offices 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.*
46. ***TOTAL NUMBER OF TRANSACTIONS WHERE FEES ARE COLLECTED FOR DMV AS A DMV LICENSING AGENT***

Financial Management:

47. ***NUMBER OF CHECKS/ACH ISSUED***: Enter the total number of checks/ACH issued during the year. INCLUDE the checks issued from all accounts under the TREASURERS supervision and ACH items listed on bank statements.
48. ***RETURNED CHECKS***: Enter the total number of checks returned for insufficient funds, account closed, etc. by your bank(s).
49. ***PREPARATION OF PAYROLL AND ADMINISTRATION***: If your office is responsible for the preparation and administration of the county payroll, enter the total number of employees for the year. If your office does not prepare the payroll for the county, please enter '0'.
50. ***NUMBER OF BANKRUPTCY CLAIMS FILED***: Enter the total number of bankruptcy claims filed with your office.

Option #7, Record Workload Information

Option #3 Annual Screens



```
MCBH-F                    COIN BUDGET REQUEST                 10/27/2009 11:35
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                 RECORD WORKLOAD INFORMATION - ANNUALLY
            CALENDAR YEAR                    2007    2008    2009      AVG

43. ESTIMATED TAX ACCOUNTS                      0       0 _______        0
44. ESTIMATED TAX PAYMENTS                    107     100 _______      104
45A. NUMBER OF TITLES PROCESSED FOR DMV         0       0 _______        0
46. NUM OF TRANS W/FEES COLLECTED FOR DMV       0       0 _______        0
FINANCIAL MANAGEMENT:
47. NUMBER CHECKS/ACH ISSUED               103277  102317 _______   102797
48. RETURNED CHECKS                           513     561 _______      537
49. PREPARATION PAYROLL AND ADMINISTRATION   3580    3777 _______     3679
50. BANKRUPTCY CLAIMS FILED                    40      90 _______       65
ADJUSTMENTS:
 1.A. TAX ASSESSMENTS ADJUSTED               1818    1670 _______     1744
 1.B. BUSINESS LICENSE ASSESSMENTS ADJ        397     415 _______      406
 1.C. PERSONAL PROPERTY ASSESSEMENTS ADJ    17044   19336 _______    18190
 1.D. BUSINESS PERS PROP ASSESSMENTS ADJ     2321    2450 _______     2386
 1.E. MERCHANT'S CAPITAL ASSESSMENTS ADJ        0       0 _______        0
 1.F. MACHINERY & TOOLS ASSESSMENTS ADJ         6      11 _______        9
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                   :00.1                                          07/63
```

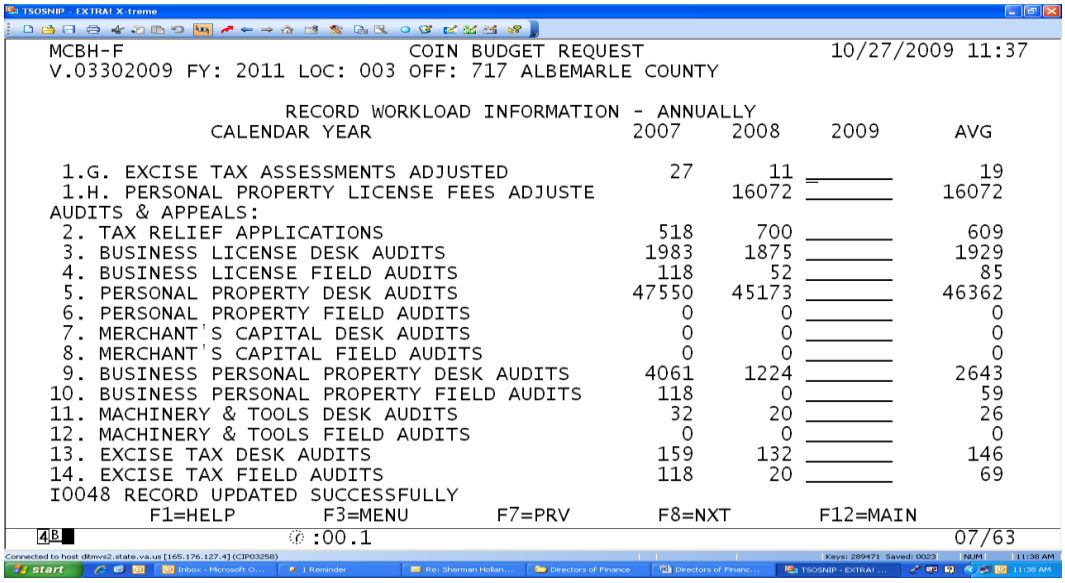
Adjustments

1. ***A. NUMBER OF REAL ESTATE TAX ASSESSMENTS ADJUSTED:*** ***Enter 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.***.

Option #7, Record Workload Information

Option #3 Annual Screens

Screen 6 of 11



```
MCBH-F                          COIN BUDGET REQUEST                 10/27/2009 11:37
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
               CALENDAR YEAR                      2007    2008    2009      AVG

 1.G. EXCISE TAX ASSESSMENTS ADJUSTED               27      11 _______       19
 1.H. PERSONAL PROPERTY LICENSE FEES ADJUSTE            16072 _______    16072
AUDITS & APPEALS:
 2. TAX RELIEF APPLICATIONS                        518     700 _______      609
 3. BUSINESS LICENSE DESK AUDITS                  1983    1875 _______     1929
 4. BUSINESS LICENSE FIELD AUDITS                  118      52 _______       85
 5. PERSONAL PROPERTY DESK AUDITS                47550   45173 _______    46362
 6. PERSONAL PROPERTY FIELD AUDITS                   0       0 _______        0
 7. MERCHANT'S CAPITAL DESK AUDITS                   0       0 _______        0
 8. MERCHANT'S CAPITAL FIELD AUDITS                  0       0 _______        0
 9. BUSINESS PERSONAL PROPERTY DESK AUDITS        4061    1224 _______     2643
10. BUSINESS PERSONAL PROPERTY FIELD AUDITS        118       0 _______       59
11. MACHINERY & TOOLS DESK AUDITS                   32      20 _______       26
12. MACHINERY & TOOLS FIELD AUDITS                   0       0 _______        0
13. EXCISE TAX DESK AUDITS                         159     132 _______      146
14. EXCISE TAX FIELD AUDITS                        118      20 _______       69
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP       F3=MENU       F7=PRV       F8=NXT       F12=MAIN
4B                  :00.1                                              07/63
```

1. 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***.

1. H. ***NUMBER OF LICENSE FEES ADJUSTED: Enter the number of license fees adjusted by your office as a result of proration or disposal of a vehicle.***

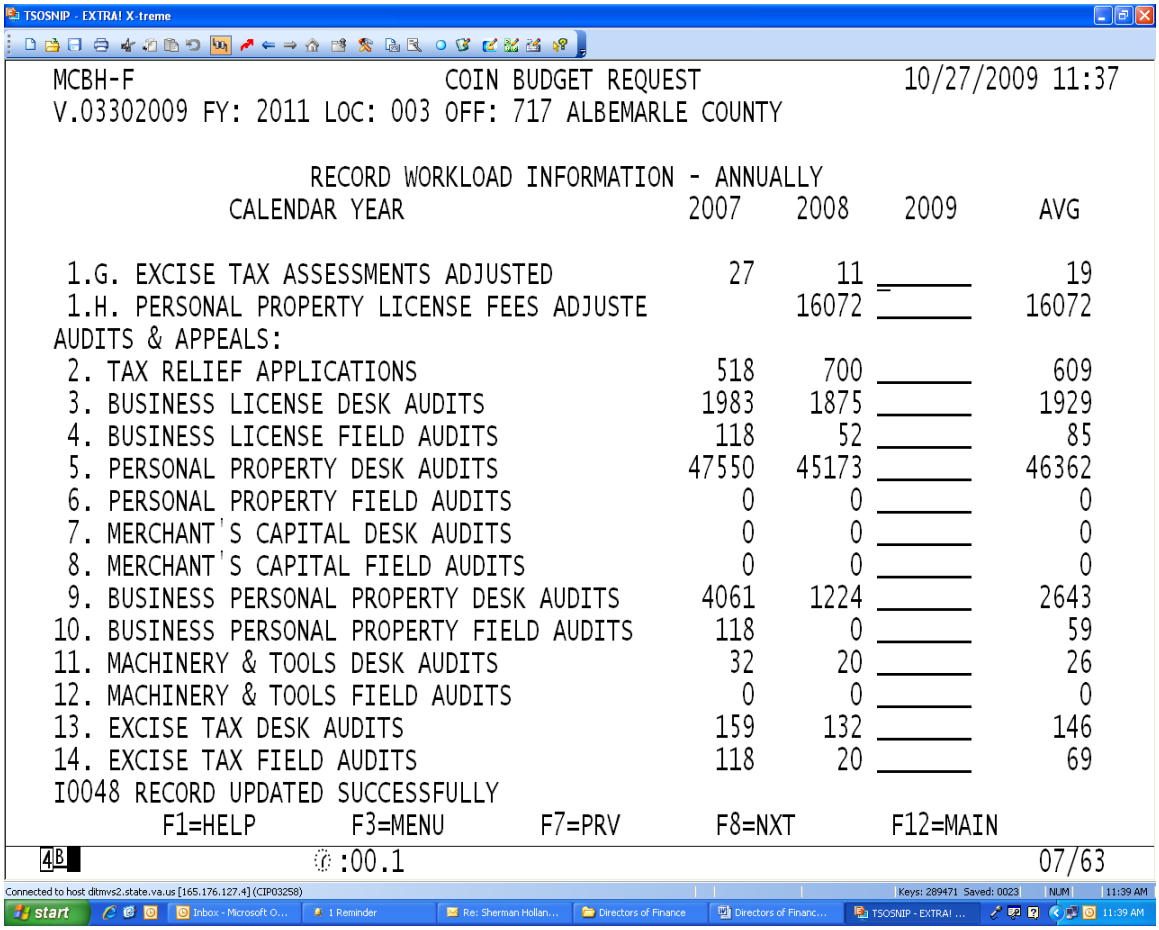
Audits & Appeals

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.

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 (see annual Audit Log.) Enter the number of new taxpayers identified through discovery 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.*
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



```
MCBH-F                        COIN BUDGET REQUEST                10/27/2009 11:37
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

 1.G. EXCISE TAX ASSESSMENTS ADJUSTED              27      11 _______       19
 1.H. PERSONAL PROPERTY LICENSE FEES ADJUSTE            16072 _______    16072
AUDITS & APPEALS:
 2. TAX RELIEF APPLICATIONS                       518     700 _______      609
 3. BUSINESS LICENSE DESK AUDITS                 1983    1875 _______     1929
 4. BUSINESS LICENSE FIELD AUDITS                 118      52 _______       85
 5. PERSONAL PROPERTY DESK AUDITS               47550   45173 _______    46362
 6. PERSONAL PROPERTY FIELD AUDITS                  0       0 _______        0
 7. MERCHANT'S CAPITAL DESK AUDITS                  0       0 _______        0
 8. MERCHANT'S CAPITAL FIELD AUDITS                 0       0 _______        0
 9. BUSINESS PERSONAL PROPERTY DESK AUDITS       4061    1224 _______     2643
10. BUSINESS PERSONAL PROPERTY FIELD AUDITS       118       0 _______       59
11. MACHINERY & TOOLS DESK AUDITS                  32      20 _______       26
12. MACHINERY & TOOLS FIELD AUDITS                  0       0 _______        0
13. EXCISE TAX DESK AUDITS                        159     132 _______      146
14. EXCISE TAX FIELD AUDITS                       118      20 _______       69
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP       F3=MENU       F7=PRV       F8=NXT       F12=MAIN
4B                  :00.1                                              07/63
```

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.*

Option #7, Record Workload Information

Option #3 Annual Screens

Screen 7 of 11

```
MCBH-F                        COIN BUDGET REQUEST                10/27/2009 11:39
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007    2008    2009      AVG

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          5       4 _______        5
20. STATE BUSINESS PERSONAL PROPERTY APPEALS          0       0 _______        0
21. LOCAL MACHINERY & TOOLS APPEALS                   0       4 _______        2
22. STATE MACHINERY & TOOLS APPEALS                   0       0 _______        0
23. LOCAL EXCISE TAX APPEALS                          7       0 _______        4
24. STATE EXCISE TAX APPEALS                          0       0 _______        0
25. LOCAL REAL ESTATE TAX APPEALS                  1400    1415 _______     1408
26. STATE REAL ESTATE TAX APPEALS                     0       1 _______        1
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:
27. BUSINESS LIC/CAPITAL ACCTS                     7932    7977 _______     7955
28. LAND USE TAX/ROLLBACK APPL                      549     343 _______      446
29. EXCISE TAXES/BUSINESS ASSESSED                  305     295 _______      300
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP       F3=MENU       F7=PRV       F8=NXT       F12=MAIN
4B                    :00.1                                              07/63
```

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 for 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).*
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.

Option #7, Record Workload Information

Option #3 Annual Screens

Screen 8 of 11

```
MCBH-F                          COIN BUDGET REQUEST                    10/27/2009 11:40
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
                CALENDAR YEAR                        2007     2008     2009       AVG

30.A. FINANCIAL INSTITUTIONS IN YOUR LOC               36       40 _______        38
30.B. FINANCIAL INST/BANK FRANCHISE TAX                11       11 _______        11
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS                 0        0 _______         0
GENERAL ADMINISTRATIVE & LEGAL:
32. GENERAL ADMINISTRATIVE DUTIES                     226      245 _______       236
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
INCOME TAX:
37. STATE TAX RETURNS PROCESSED                         0        0 _______         0
38. ESTIMATED STATE TAX ASSESSMENTS                     0        0 _______         0
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX           48       31 _______        40
40. STATE TAX RETURNS PREPARED                         35       22 _______        29
PERSONAL PROPERTY AND MACHINERY & TOOLS:
41. PERSONAL PROPERTY ASSESSEMENTS                118875   117506 _______    118191
I0048 RECORD UPDATED SUCCESSFULLY
      F1=HELP        F3=MENU        F7=PRV        F8=NXT        F12=MAIN
4B                   :00.3                                                   07/63
```

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.

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 of annual surveys completed, general information requests (including FOIA requests). Enter number of personnel reviews conducted. Enter the total number of businesses listed in the "Sales Tax Adds & Deletes" reports that you have reviewed.* ***Do not*** *add new businesses or merchant's capital. (See current workload measure #8 Number of Business Licenses Issued and Merchant's 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.*

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 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.* ***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 home*, 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.

Option #7, Record Workload Information

Option #3 Annual Screens

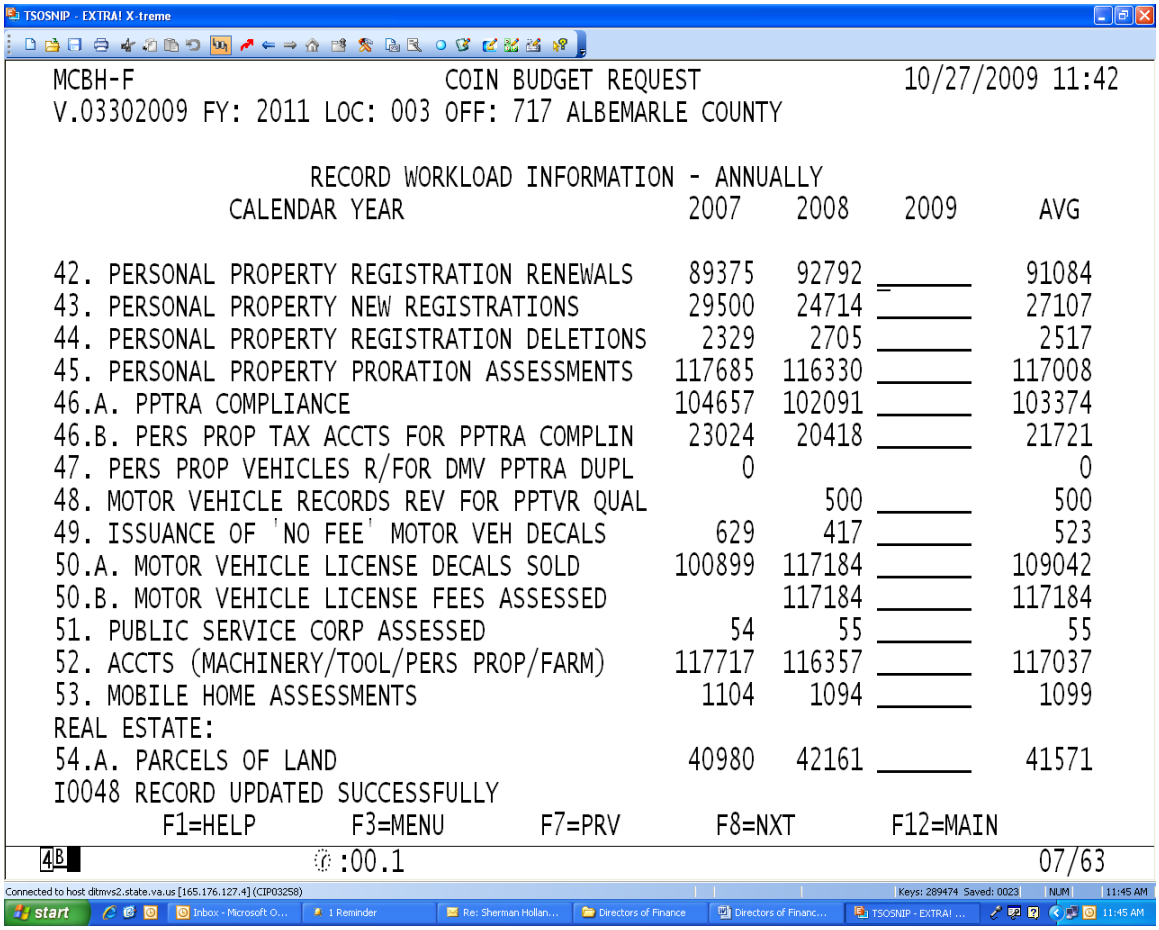
Screen 9 of 11

```
MCBH-F                          COIN BUDGET REQUEST                 10/27/2009 11:42
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007    2008    2009      AVG

42. PERSONAL PROPERTY REGISTRATION RENEWALS       89375   92792 _______    91084
43. PERSONAL PROPERTY NEW REGISTRATIONS           29500   24714 _______    27107
44. PERSONAL PROPERTY REGISTRATION DELETIONS       2329    2705 _______     2517
45. PERSONAL PROPERTY PRORATION ASSESSMENTS      117685  116330 _______   117008
46.A. PPTRA COMPLIANCE                           104657  102091 _______   103374
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN       23024   20418 _______    21721
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL           0                        0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL                 500 _______      500
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS           629     417 _______      523
50.A. MOTOR VEHICLE LICENSE DECALS SOLD          100899  117184 _______   109042
50.B. MOTOR VEHICLE LICENSE FEES ASSESSED                117184 _______   117184
51. PUBLIC SERVICE CORP ASSESSED                     54      55 _______       55
52. ACCTS (MACHINERY/TOOL/PERS PROP/FARM)        117717  116357 _______   117037
53. MOBILE HOME ASSESSMENTS                        1104    1094 _______     1099
REAL ESTATE:
54.A. PARCELS OF LAND                             40980   42161 _______    41571
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP       F3=MENU       F7=PRV       F8=NXT       F12=MAIN
4B                  :00.1                                              07/63
```

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 to receive relief****.*
    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 registration, etc.).* ***Do not*** *include vehicles adjusted.*
47. ***NO DATA TO BE RECORDED***
48. ***NUMBER OF PERSONAL PROPERTY VEHICLES REVIEWED FOR PERSONAL PROPERTY TAX RELIEF QUALIFICATION.***
49. ***NUMBER OF MOTOR VEHICLE "NO FEE" DECALS ISSUED (EX., MILITARY PERSONNEL OR OWNERSHIP TRANSFERS).***
50. ***A. NUMBER OF MOTOR VEHICLE LICENSE DECALS SOLD.***
    B. NUMBER OF MOTOR VEHICLE LICENSE FEES ASSESSED

Option #7, Record Workload Information

Option #3 Annual Screens



```
MCBH-F                    COIN BUDGET REQUEST                10/27/2009 11:42
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                 RECORD WORKLOAD INFORMATION - ANNUALLY
            CALENDAR YEAR                      2007    2008    2009      AVG

42. PERSONAL PROPERTY REGISTRATION RENEWALS    89375   92792 _______    91084
43. PERSONAL PROPERTY NEW REGISTRATIONS        29500   24714 _______    27107
44. PERSONAL PROPERTY REGISTRATION DELETIONS    2329    2705 _______     2517
45. PERSONAL PROPERTY PRORATION ASSESSMENTS   117685  116330 _______   117008
46.A. PPTRA COMPLIANCE                        104657  102091 _______   103374
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN    23024   20418 _______    21721
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL        0                        0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL              500 _______      500
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS        629     417 _______      523
50.A. MOTOR VEHICLE LICENSE DECALS SOLD       100899  117184 _______   109042
50.B. MOTOR VEHICLE LICENSE FEES ASSESSED             117184 _______   117184
51. PUBLIC SERVICE CORP ASSESSED                 54      55 _______       55
52. ACCTS (MACHINERY/TOOL/PERS PROP/FARM)     117717  116357 _______   117037
53. MOBILE HOME ASSESSMENTS                     1104    1094 _______     1099
REAL ESTATE:
54.A. PARCELS OF LAND                          40980   42161 _______    41571
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                  :00.1                                          07/63
```

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. **Should be the same number reflected in your property book.**
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

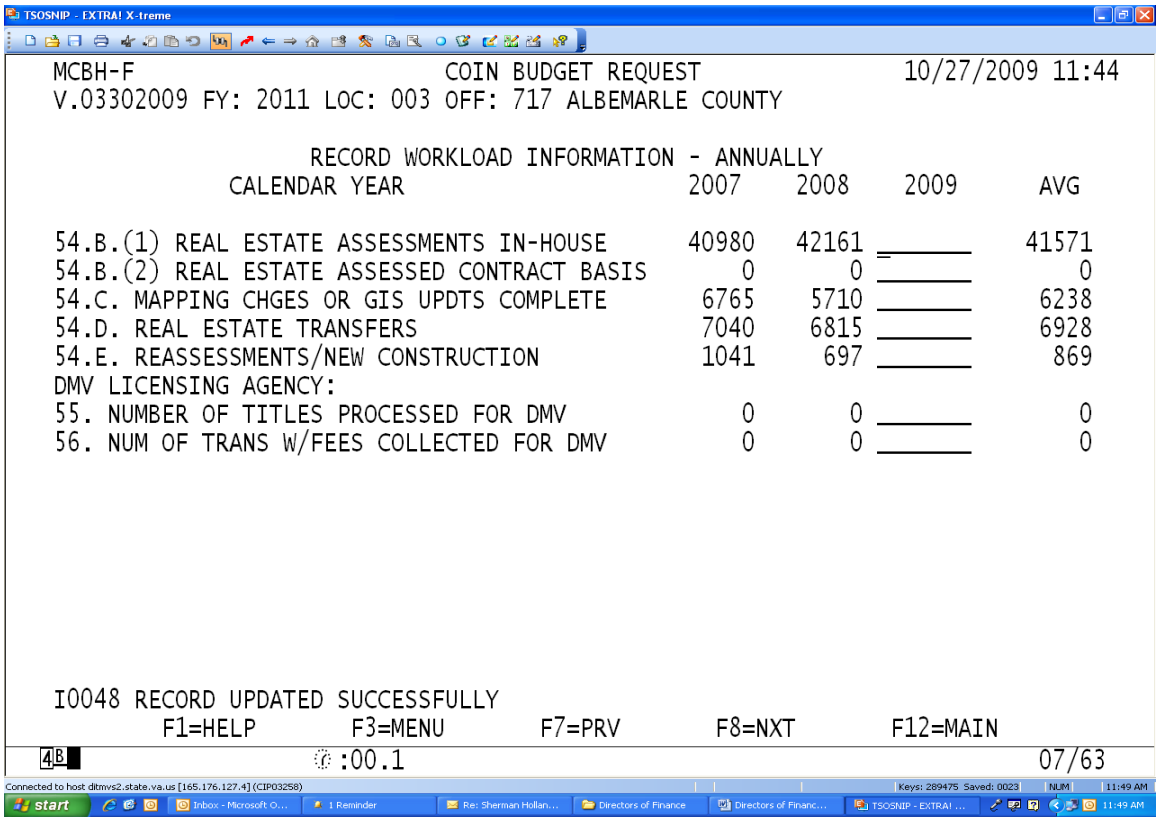
54. ***A. NUMBER OF PARCELS OF LAND****: If your office assesses real estate, enter the total number of parcels of real estate, taxable and non taxable.* ***Do not*** *multiply this figure by any factor if you prorate or bill more than once a year.*

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 Reassessments 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.)* ***Report only in the year work is completed.***

B. (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.* ***Report only in the year work is completed.***

Option #7, Record Workload Information

Option #3 Annual Screens



```
MCBH-F                        COIN BUDGET REQUEST                10/27/2009 11:44
V.03302009 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

54.B.(1) REAL ESTATE ASSESSMENTS IN-HOUSE       40980   42161 _______    41571
54.B.(2) REAL ESTATE ASSESSED CONTRACT BASIS        0       0 _______        0
54.C. MAPPING CHGES OR GIS UPDTS COMPLETE        6765    5710 _______     6238
54.D. REAL ESTATE TRANSFERS                      7040    6815 _______     6928
54.E. REASSESSMENTS/NEW CONSTRUCTION             1041     697 _______      869
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
4B                   :00.1                                          07/63
```

Screen 10 of 11

54. ***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.*

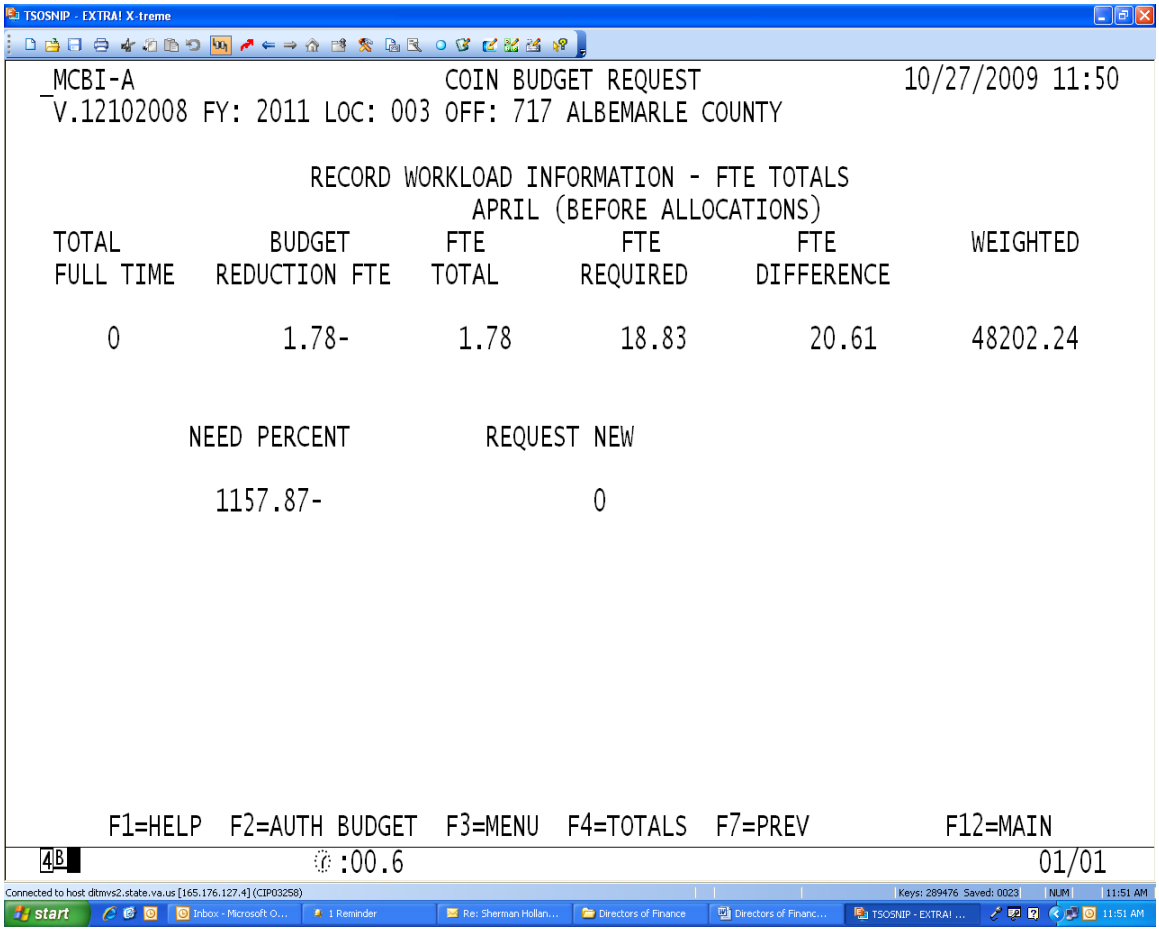
DMV Licensing Agency

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 11 of 11



```
MCBI-A                    COIN BUDGET REQUEST                10/27/2009 11:50
V.12102008 FY: 2011 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                  RECORD WORKLOAD INFORMATION - FTE TOTALS
                              APRIL (BEFORE ALLOCATIONS)
TOTAL          BUDGET       FTE          FTE          FTE          WEIGHTED
FULL TIME   REDUCTION FTE   TOTAL      REQUIRED     DIFFERENCE

    0           1.78-        1.78        18.83        20.61       48202.24


         NEED PERCENT          REQUEST NEW

           1 157.87-                  0 ‌‌‌
```

Option #7 Record Workload Information

	Treasurer's Workload Elements	Weighted Factor
Real Estate Tax:		
1	Number of taxable parcels	0.09
2	Number of parcels maintained for mortgage companies	0.04
3	Number of real estate abatements	0.21
4	Number of real estate tax bills processed per year	0.00
5	Number of real estate transfers	0.02
6	Number of real estate parcels in relief to the elderly/disabled program	0.14
7	Number of parcels in the land use program	0.01
Personal Property:		
8	Number of personal property items in relief to the elderly/disabled program	0.10
9	Number of items on which personal property tax is assessed each year	0.05
10	Number of personal property tax bills processed per year	0.00
11	Number of personal property address changes updated	0.05
12	Number of personal property abatements	0.03
~~PPTRA~~ Dog Licenses:		
13	~~Duplicate reports for personal property relief (PPTRA)~~ **Number of dog licenses sold**	~~0.36~~ **0.10**
14	~~PPTRA compliance audit~~ **Dog license notices**	~~0.53~~ **0.14**
15	~~PPTRA records submitted for reimbursement~~ **Rabies certificates sent to other localities**	~~0.00~~ **0.01**
Collection Actions:		
16	Number of accounts in debt set off program based on number of claims filed	0.02
17	Number of warrants **in debt** issued	0.15
18	Number of parcels in judicial sale proceedings	2.01
19	Number of ~~3952 tax~~ liens issued **(includes bank, wage, and other third party liens)**	0.40
20	Number of Treasurers' summons	1.13
21	Number of distress ~~warrants~~ **actions to seize property**	4.03
22	Total of delinquent notices for real estate and personal property	0.02
23	Number of DMV stops issued	0.23
24	Number of monthly payment plans maintained for prepayment of taxes and delinquent collections **(include ACH payments)**	0.69
25	Number of meals tax enforcement actions **by distress** ~~taken to "padlock" business~~	4.03
26	Number of other collections	0.28
Fees, Permits, and Other Licenses:		
27	Number of vehicle **decals issued** ~~license sold~~	0.04
28	Number of other vehicle registrations	0.06
29	~~Number of dog licenses sold~~ **Number of vehicle license fees billed (include abatements)**	~~0.10~~ **0.01**
30	Number of utility bills collected	0.00
31	Number of trash collection bills collected	0.00
32	Number of annual trash decals issued	0.00
33	Number of parking tickets collected	0.00
34	Number of zone permit parking fees collected	0.00

35	Number of building permits processed	0.00
36	Number of local businesses on which license tax is collected **(BPOL)**	0.00
37	Number of business accounts on which local excise tax is collected	0.00
38	Number of utility tax and consumer utility tax accounts	0.00
39	Number of parks and recreation fees processed	0.00
	Treasurer's Workload Elements	Weighted Factor
40	Number of other local bills collected	0.00
State Income Tax and Other State Duties:		
41	Number of state income tax memoranda received/processed	0.16
42	Number of collection actions initiated against state income tax returns	0.15
43	Number of accounts maintained on estimated state income tax returns	0.12
44	Number of estimated state income tax payments collected	0.07
45A	Number of titles processed for DMV	0.25
46	Total number of transactions for which fees are collected for DMV	0.07
Financial Management:		
47	~~Bank reconciliations~~ **Number checks/ACH issued**	0.02
48	Returned checks	0.64
49	Preparation of payroll and administration	0.00
50	Number of bankruptcy claims filed	0.92

Staffing Need = $y = 1.594 + 0.0005x + -3e\text{-}9x^{1.95}$

	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
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 personal property vehicles researched for the DMV PPTRA reconciliation report~~ **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 ~~decals~~ ~~sold~~ **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
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 DMV licensing agency transactions~~ **Number of titles processed for DMV**	**0.25**
56	**Total number of transactions for which fees are collected for DMV**	**0.07**

Staffing Need =	$y = 1.3074 + 0.0005x + -2e\text{-}9x^{1.95}$

Option #7 Record Workload Information

Beginning February 1 offices can begin recording workload data monthly, quarterly or annually for CY 2015

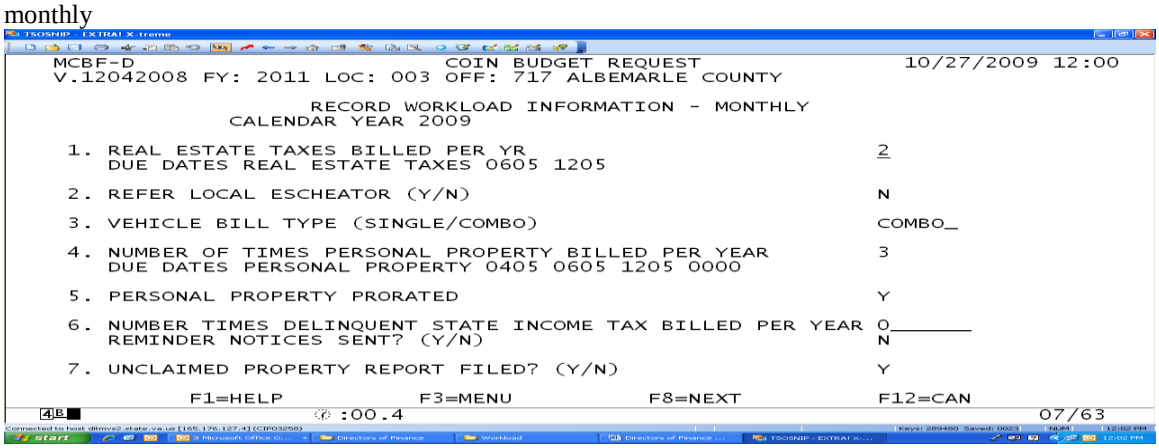
This can be done by selecting options 1, 2, or 3 from the "Record Workload Information" menu

- 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 CY 2015) to input CY 2016 data

Option # 1 Monthly Screens

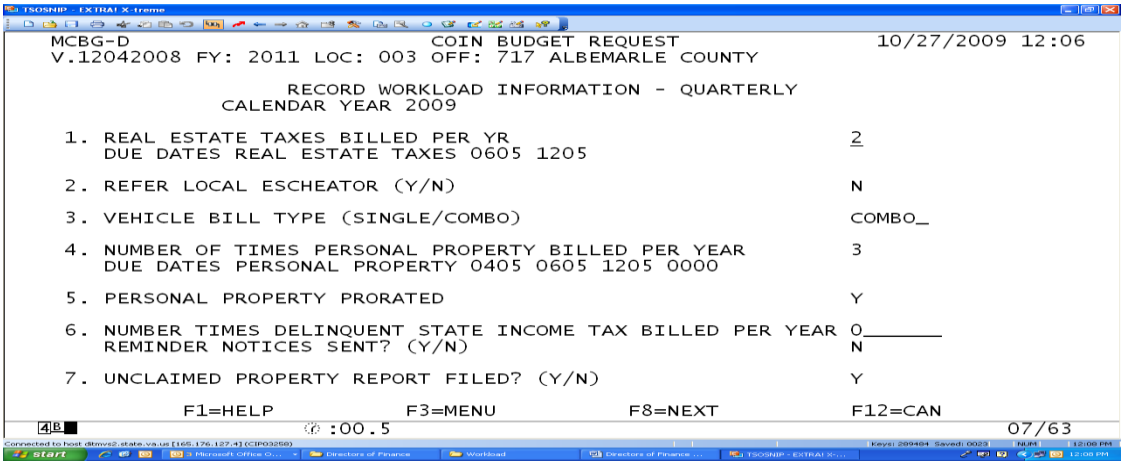
The monthly screens have all the same workload elements as the annual screens only data is entered monthly



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

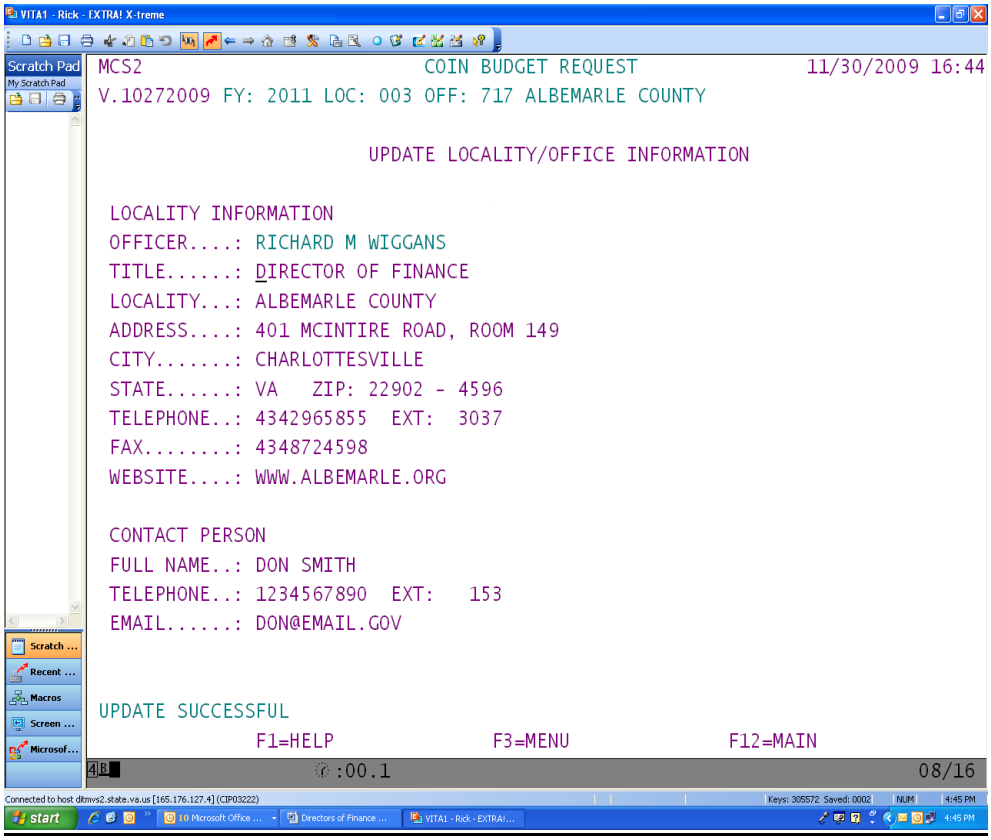
Purpose:

This screen 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.

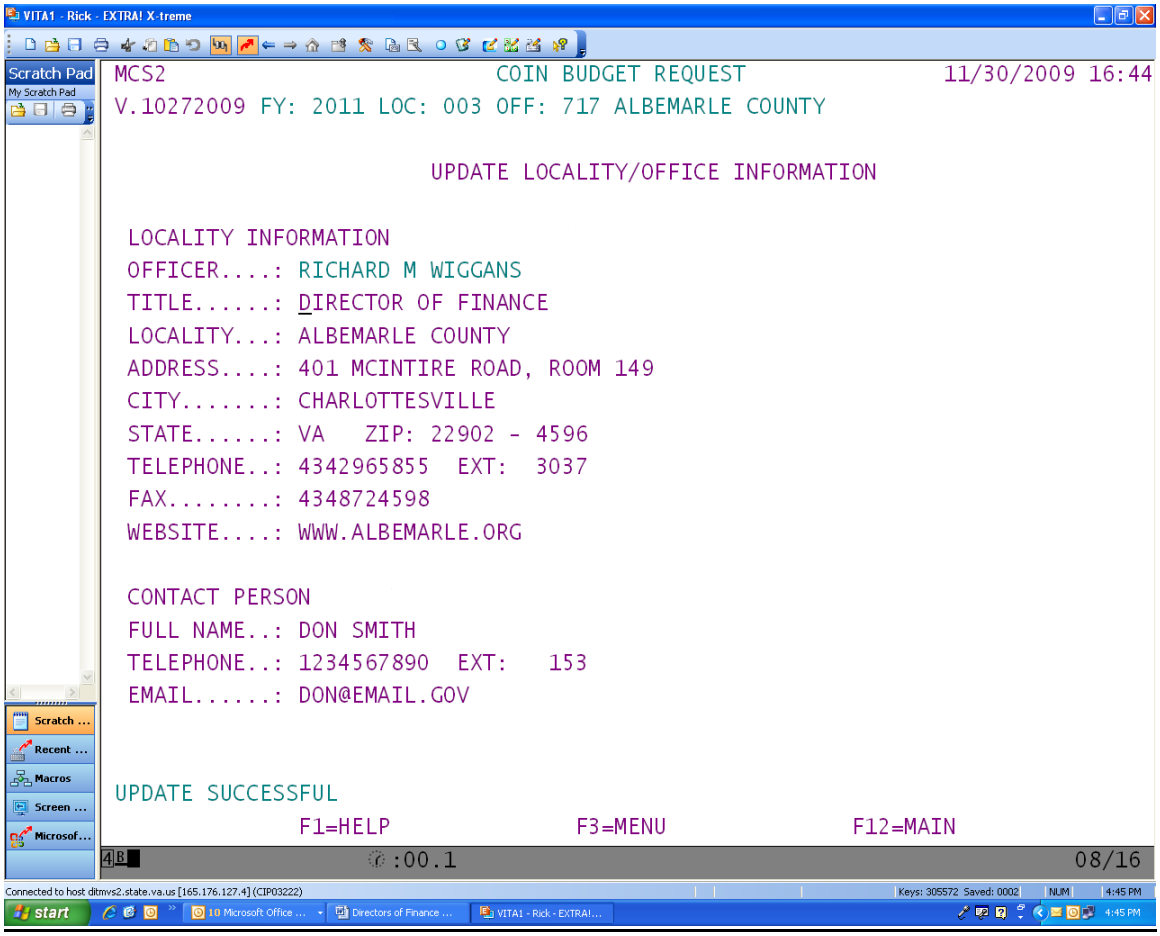
Navigational Path:

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

Option #8 Update Locality Information



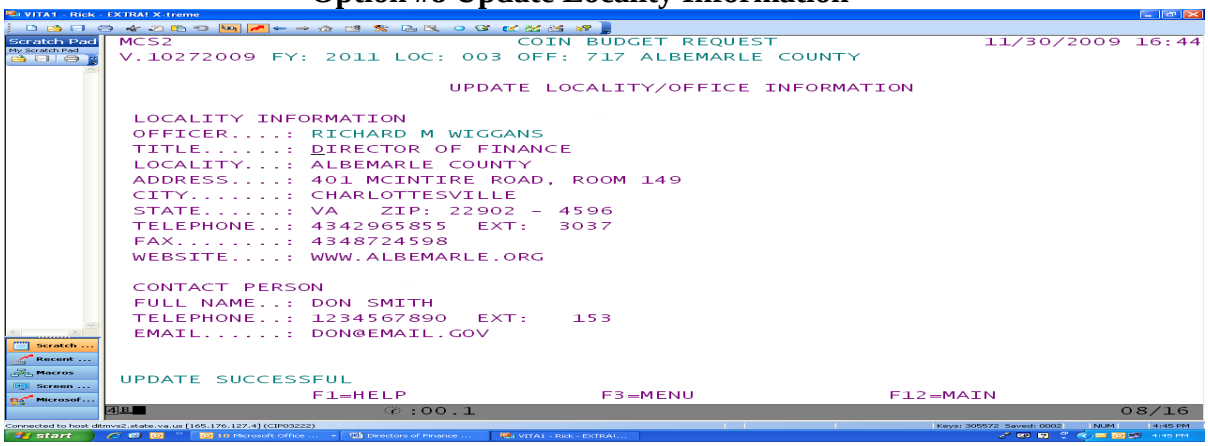
Option #8 Update Locality Information



Helpful Hints:

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

Option #8 Update Locality Information



Procedures:

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 **-717** (Director of Finance)
    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**'

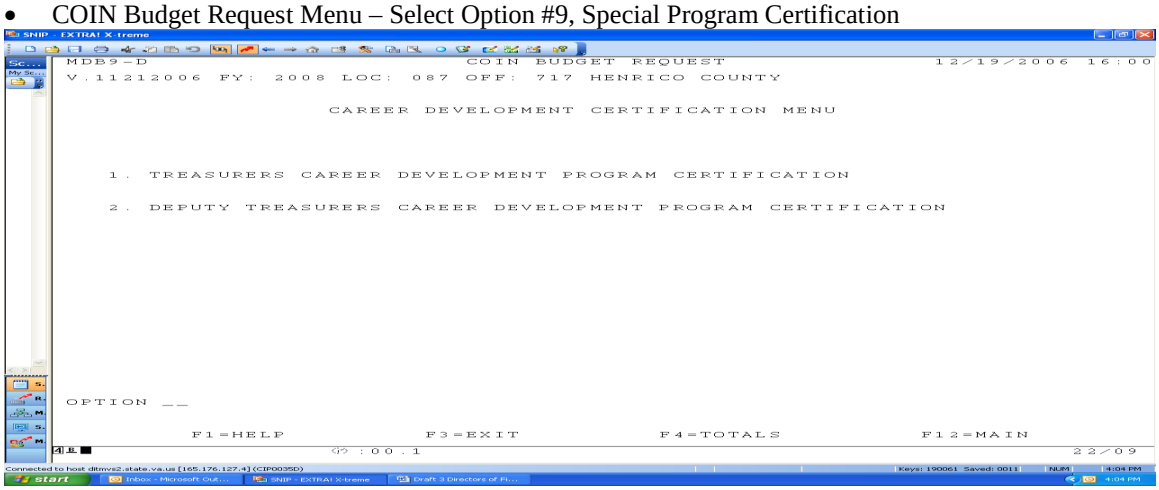
11. Option #9, Special Program Certification

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.

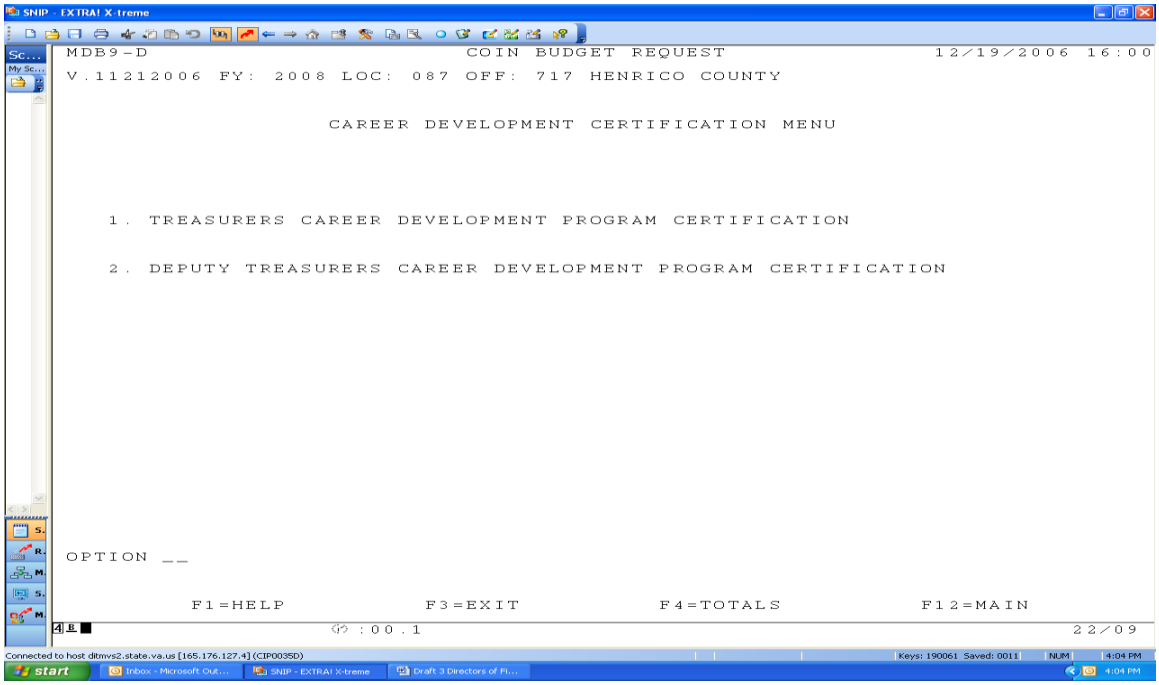
- **Directors of Finance Career Development Program**
  - **If the Director of Finance is not certified** do not enter due dates, percentages, or participating and enrolled employees, but you **must** answer the question "DOF meets all Criteria of CDP Y/N" with "N" for No and signoff on the program, this verifies that this screen was viewed by each office.
  - If the Director of Finance has already received their CDP increase they **must** re-apply for career development **each year** by completing the Director of Finance Career Development Certification in COIN by February 1 to maintain the CDP increase.
  - The Officer must adopt the Deputy Director of Finance Career Development Program to be eligible for participation in the officer Career Development Program
  - The Director of Finance must have the required number of participating and enrolled deputies to qualify.
  - Do not enter the Officer's name on this screen.
- **Deputy Directors of Finance Career Development Program**
  - ✓ The blanks on this screen are only for the names of Certified Deputy Directors of Finance, **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.
  - ✓ **Deputy Directors of Finance Career Development Program is not currently funded by the CB,** however, if the locality funds Deputy Directors of Finance then the deputies may still be eligible for the CDP increase.

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



- Option #1 Treasurers Career Development Program Certification
- Option #2 Deputy Treasurers Career Development Program Certification

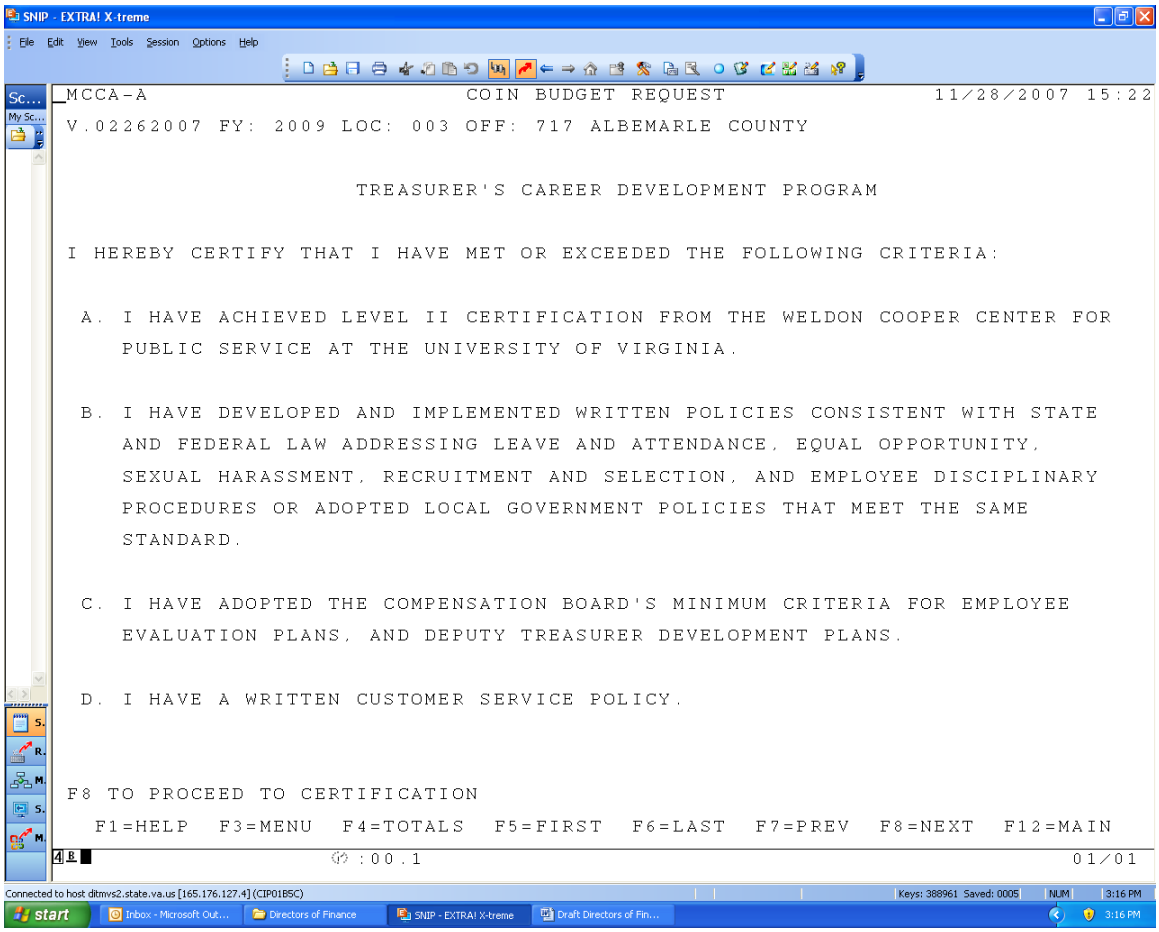
Procedures:

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

Option #9, Special Program Certification

Option #1 Director of Finance Career Development Program Certification

Screen 1 of 5

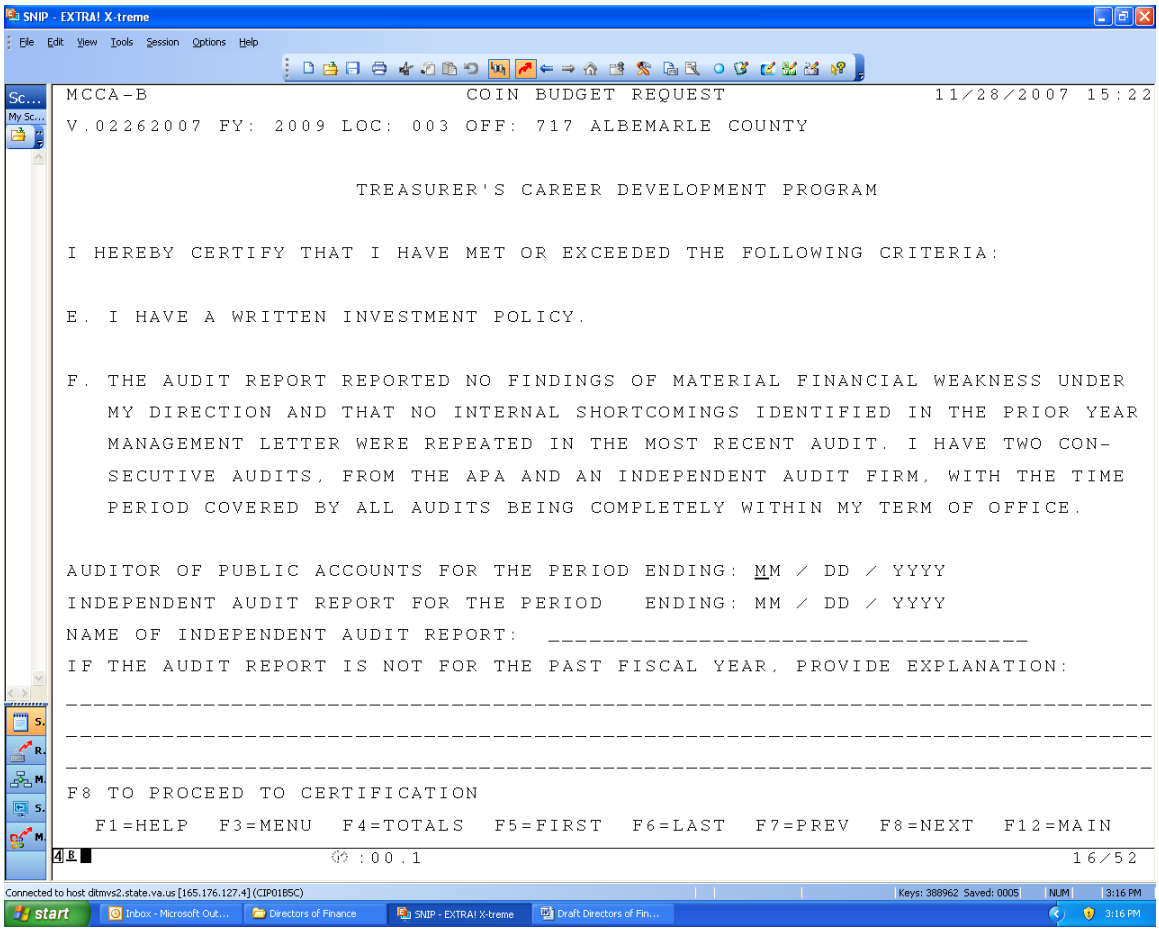


```
MCCA-A                          COIN BUDGET REQUEST                    11/28/2007 15:22
V.02262007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                        TREASURER'S CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:

 A. I HAVE ACHIEVED LEVEL II CERTIFICATION FROM THE WELDON COOPER CENTER FOR
    PUBLIC SERVICE AT THE UNIVERSITY OF VIRGINIA.

 B. I HAVE DEVELOPED AND IMPLEMENTED WRITTEN POLICIES CONSISTENT WITH STATE
    AND FEDERAL LAW ADDRESSING LEAVE AND ATTENDANCE, EQUAL OPPORTUNITY,
    SEXUAL HARASSMENT, RECRUITMENT AND SELECTION, AND EMPLOYEE DISCIPLINARY
    PROCEDURES OR ADOPTED LOCAL GOVERNMENT POLICIES THAT MEET THE SAME
    STANDARD.

 C. I HAVE ADOPTED THE COMPENSATION BOARD'S MINIMUM CRITERIA FOR EMPLOYEE
    EVALUATION PLANS, AND DEPUTY TREASURER DEVELOPMENT PLANS.

 D. I HAVE A WRITTEN CUSTOMER SERVICE POLICY.


F8 TO PROCEED TO CERTIFICATION
  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                                  :00.1                                        01/01
```

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

Option #9, Special Program Certification

Screen 2 of 5



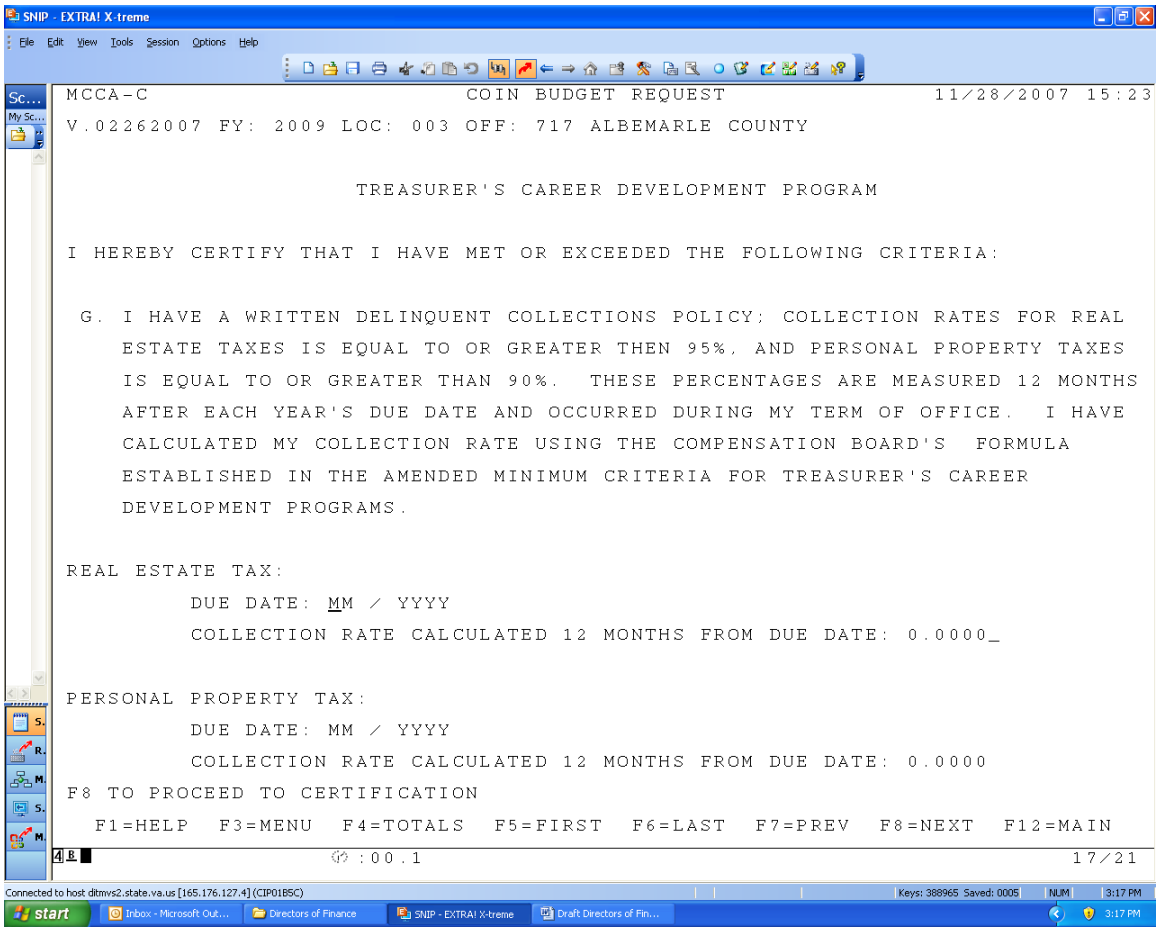
- Enter the period ending date for the audit by public accounts
- Enter the period ending date for the independent audit report
- Enter the Name of the Independent Audit Report
- Enter an explanation if the two audits are from different fiscal years

****Please fill this information in <u>only</u> if the Director of Finance is certified****

- Press 'F8' to proceed with certification

Option #9, Special Program Certification

Screen 3 of 5



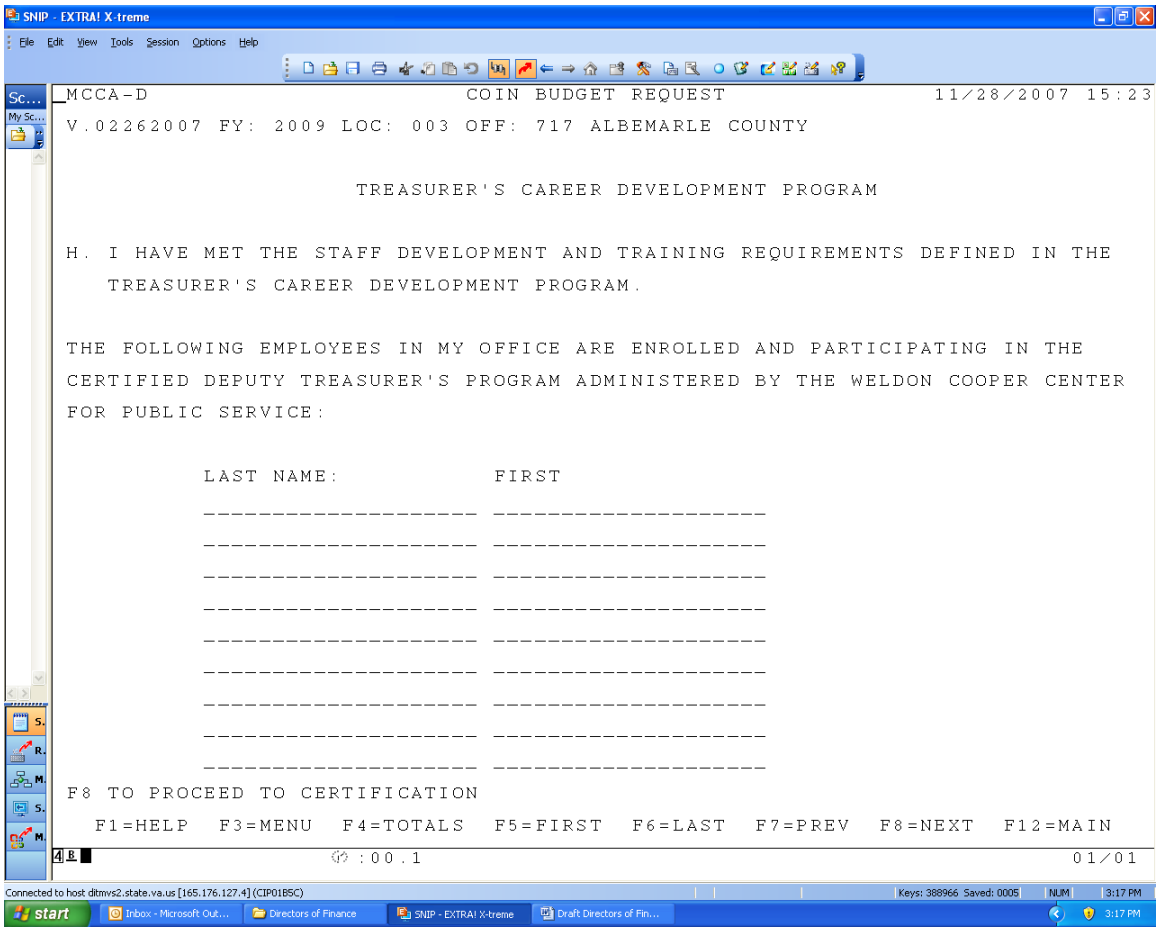
- Enter the due date for Real Estate Tax
- Enter the Collection rate for the Real Estate Tax
- Enter the due date for Personal Property Tax
- Enter the Collection rate for Personal Property Tax

****Please fill this information in only if the Director of Finance is certified****

- Press 'F8' to proceed to the next page

Option #9, Special Program Certification

Screen 4 of 5



- Enter the following information for deputies participating and enrolled in the Deputy Director of Finance Program **if the officer is certified. If the officer is not certified do not enter any names.**
- Last Name
- First Name

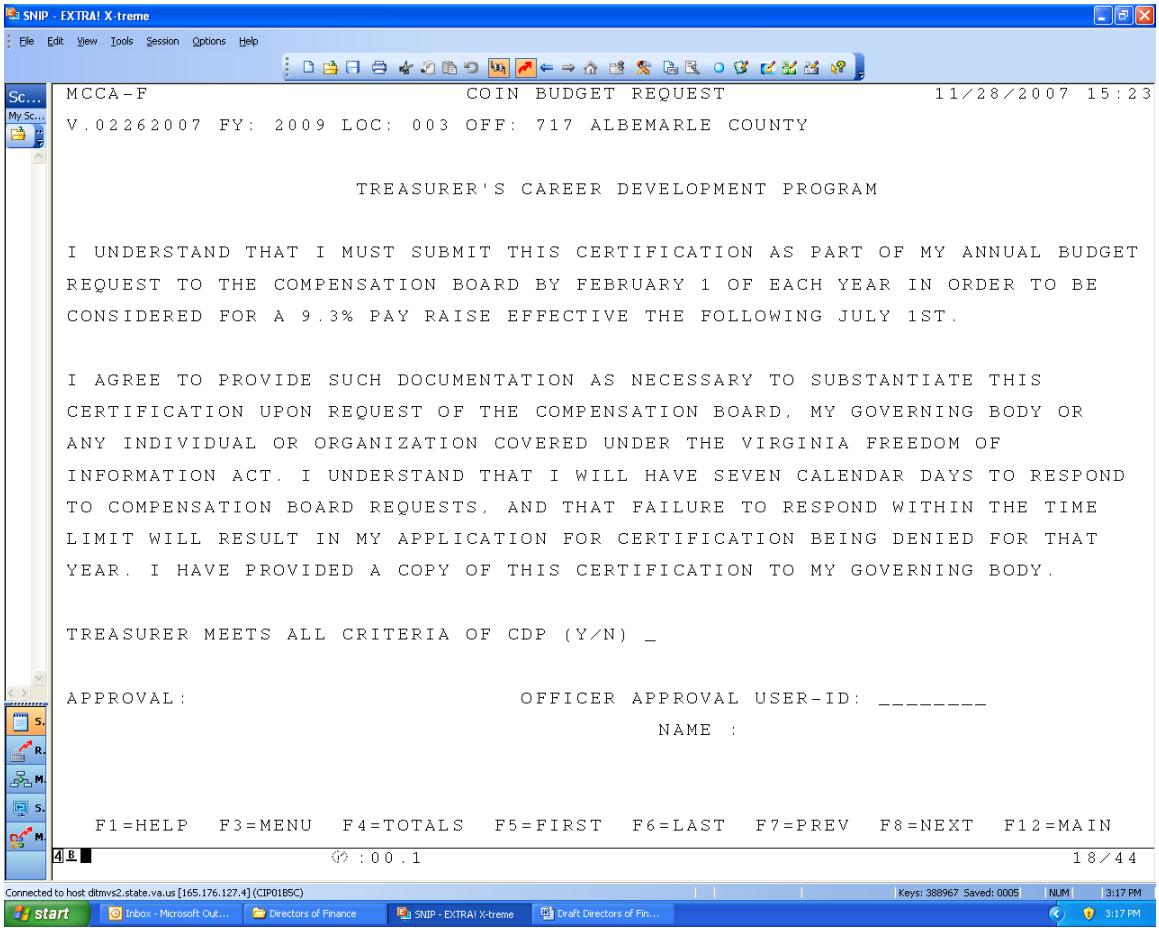
Press 'F8' to proceed to the next page

<u>Helpful Hints</u>

- <u>Participating and enrolled deputies **do not** have to be Compensation Board funded.</u>
- <u>DO NOT enter the Director of Finance's name on this screen , it is for the names of **deputies only**</u>

Option #9, Special Program Certification

Screen 5 of 5



```
MCCA-F                          COIN BUDGET REQUEST                 11/28/2007 15:23
V.02262007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                    TREASURER'S CAREER DEVELOPMENT PROGRAM

I UNDERSTAND THAT I MUST SUBMIT THIS CERTIFICATION AS PART OF MY ANNUAL BUDGET
REQUEST TO THE COMPENSATION BOARD BY FEBRUARY 1 OF EACH YEAR IN ORDER TO BE
CONSIDERED FOR A 9.3% PAY RAISE EFFECTIVE THE FOLLOWING JULY 1ST.

I AGREE TO PROVIDE SUCH DOCUMENTATION AS NECESSARY TO SUBSTANTIATE THIS
CERTIFICATION UPON REQUEST OF THE COMPENSATION BOARD, MY GOVERNING BODY OR
ANY INDIVIDUAL OR ORGANIZATION COVERED UNDER THE VIRGINIA FREEDOM OF
INFORMATION ACT. I UNDERSTAND THAT I WILL HAVE SEVEN CALENDAR DAYS TO RESPOND
TO COMPENSATION BOARD REQUESTS, AND THAT FAILURE TO RESPOND WITHIN THE TIME
LIMIT WILL RESULT IN MY APPLICATION FOR CERTIFICATION BEING DENIED FOR THAT
YEAR. I HAVE PROVIDED A COPY OF THIS CERTIFICATION TO MY GOVERNING BODY.

TREASURER MEETS ALL CRITERIA OF CDP (Y/N) _

APPROVAL:                          OFFICER APPROVAL USER-ID: ________
                                              NAME :

  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                          :00.1                                              18/44
```

- Enter 'Y' or 'N' for "Treasurer Meets all criteria for CDP"
- Enter the Officer's SCB USERID to certify

<u>Helpful Hints</u>

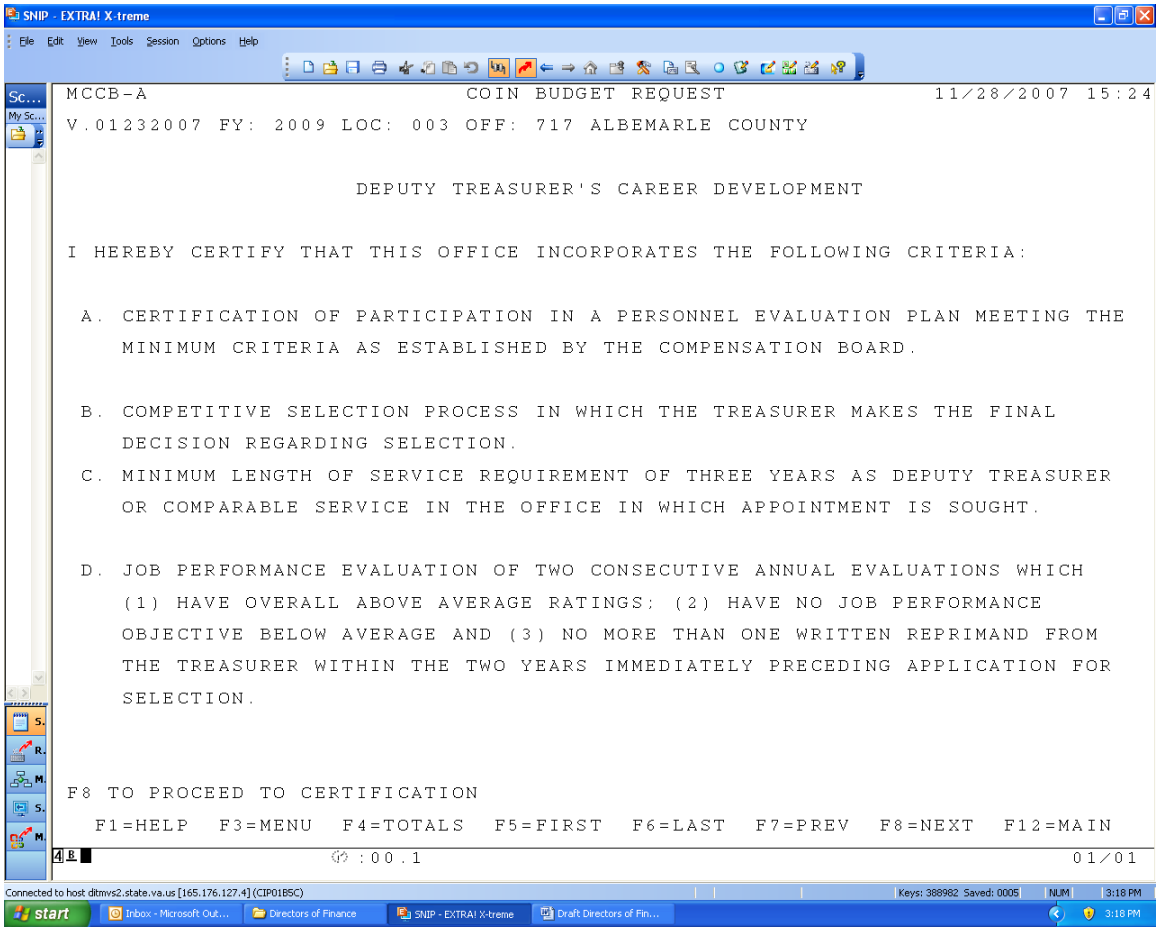
- <u>If the Director of Finance is **not certified** you **must** answer "N' to the question "Treasurer meets all criteria of CDP.</u>

Option #9, Special Program Certification

Option #2 Deputy Director of Finance Career Development Program Certification

Read through each screen to determine compliance with Compensation Board Minimum Standards for Deputy Director of Finance's Career Development Program

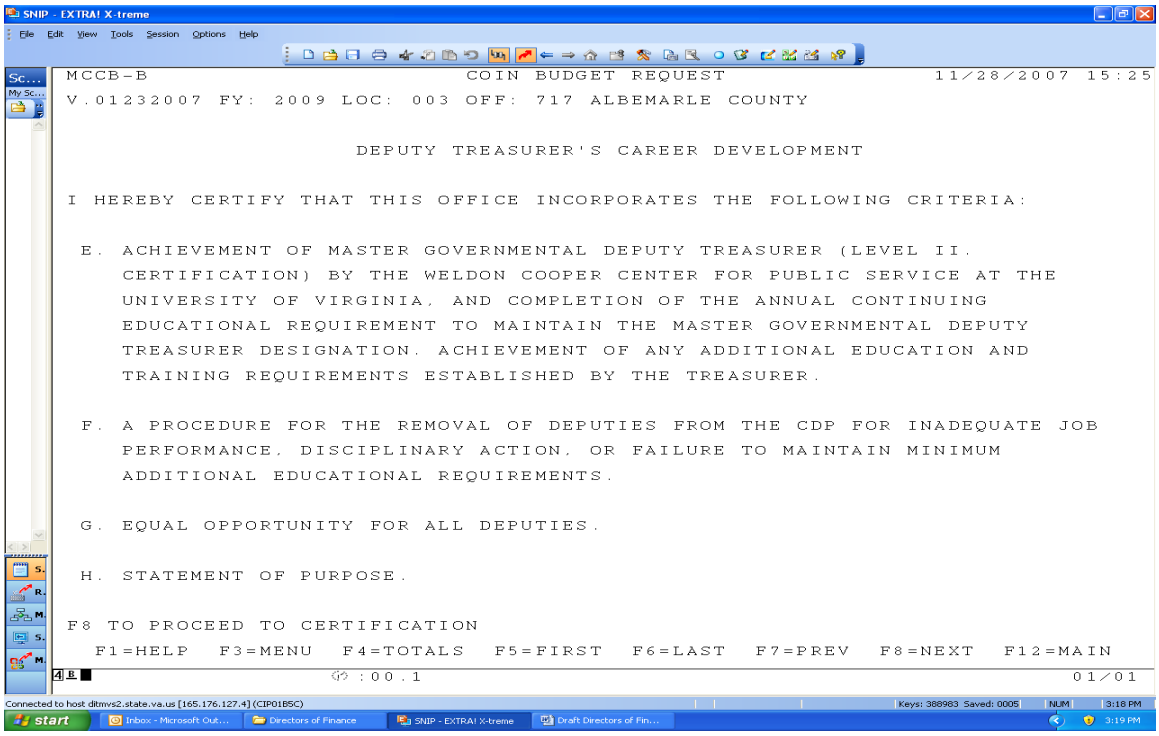
Screen 1 of 4



Press 'F8' to proceed to the next page

Option #9, Special Program Certification

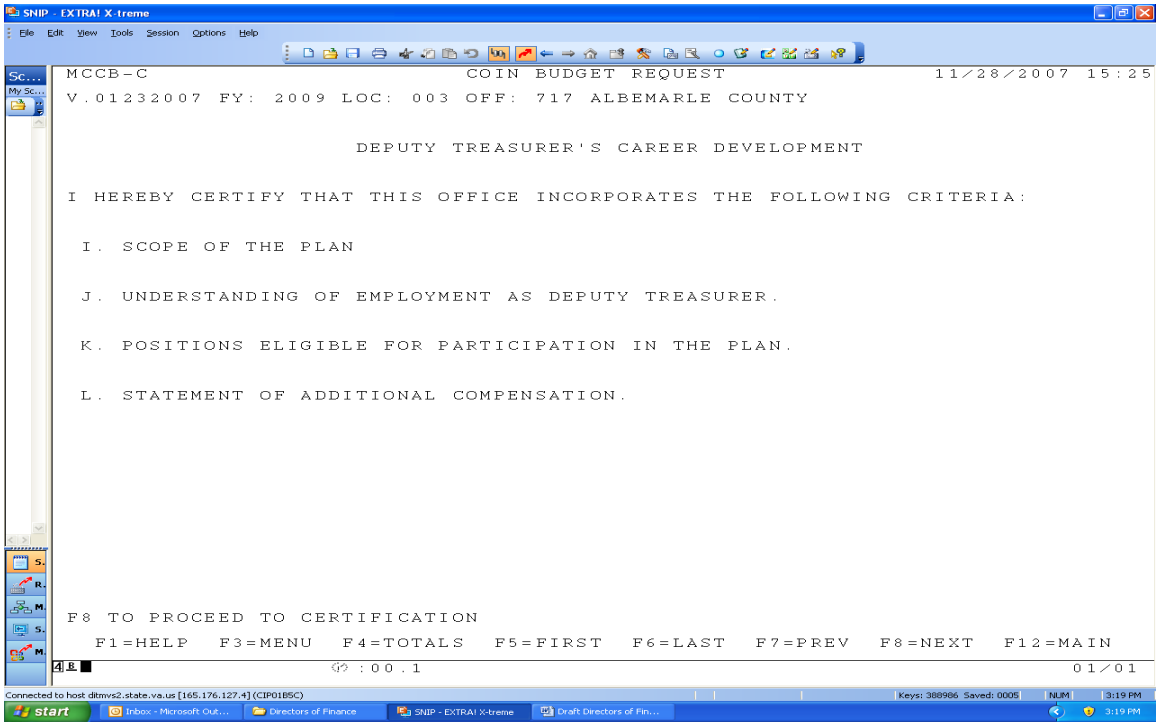
Screen 2 of 4



```
MCCB-B                          COIN BUDGET REQUEST                    11/28/2007 15:25
V.01232007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                        DEPUTY TREASURER'S CAREER DEVELOPMENT

I HEREBY CERTIFY THAT THIS OFFICE INCORPORATES THE FOLLOWING CRITERIA:

 E. ACHIEVEMENT OF MASTER GOVERNMENTAL DEPUTY TREASURER (LEVEL II.
    CERTIFICATION) BY THE WELDON COOPER CENTER FOR PUBLIC SERVICE AT THE
    UNIVERSITY OF VIRGINIA, AND COMPLETION OF THE ANNUAL CONTINUING
    EDUCATIONAL REQUIREMENT TO MAINTAIN THE MASTER GOVERNMENTAL DEPUTY
    TREASURER DESIGNATION. ACHIEVEMENT OF ANY ADDITIONAL EDUCATION AND
    TRAINING REQUIREMENTS ESTABLISHED BY THE TREASURER.

 F. A PROCEDURE FOR THE REMOVAL OF DEPUTIES FROM THE CDP FOR INADEQUATE JOB
    PERFORMANCE, DISCIPLINARY ACTION, OR FAILURE TO MAINTAIN MINIMUM
    ADDITIONAL EDUCATIONAL REQUIREMENTS.

 G. EQUAL OPPORTUNITY FOR ALL DEPUTIES.

 H. STATEMENT OF PURPOSE.

F8 TO PROCEED TO CERTIFICATION
  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                                  :00.1                                          01/01
```

Press 'F8' to proceed to the next page

Screen 3 of 4

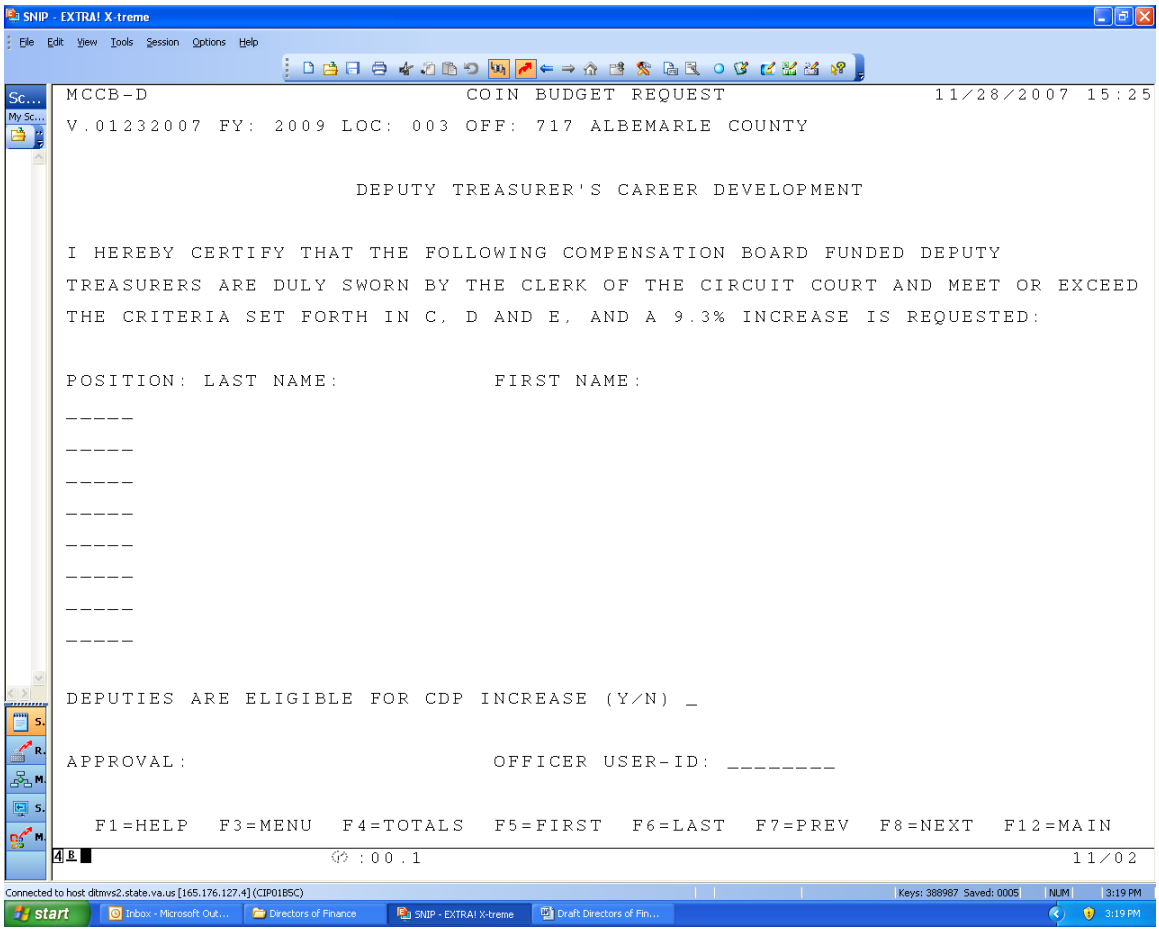


```
MCCB-C                          COIN BUDGET REQUEST                    11/28/2007 15:25
V.01232007 FY: 2009 LOC: 003 OFF: 717 ALBEMARLE COUNTY

                        DEPUTY TREASURER'S CAREER DEVELOPMENT

I HEREBY CERTIFY THAT THIS OFFICE INCORPORATES THE FOLLOWING CRITERIA:

 I. SCOPE OF THE PLAN

 J. UNDERSTANDING OF EMPLOYMENT AS DEPUTY TREASURER.

 K. POSITIONS ELIGIBLE FOR PARTICIPATION IN THE PLAN.

 L. STATEMENT OF ADDITIONAL COMPENSATION.

F8 TO PROCEED TO CERTIFICATION
  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                                  :00.1                                          01/01
```

Press 'F8' to proceed with certification

Option #9, Special Program Certification

Screen 4 of 4



Enter the Position Number, for each employee who is a sworn Deputy Director of Finance and for whom you seek a 9.3% pay increase **or any deputy who has already received the increase and is maintaining certification,** and press the "Enter" key. The name of the employee in that position will appear.

Procedure

- Enter the Position Number
- Press the "Enter" key
- The name of employee in the position will appear
- Enter 'Y' or 'N' for "Deputy is eligible for the CDP increase"
- Enter the Officer's SCB USERID to certify

Helpful Hints

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

12. Option #10 - Certify Budget Request

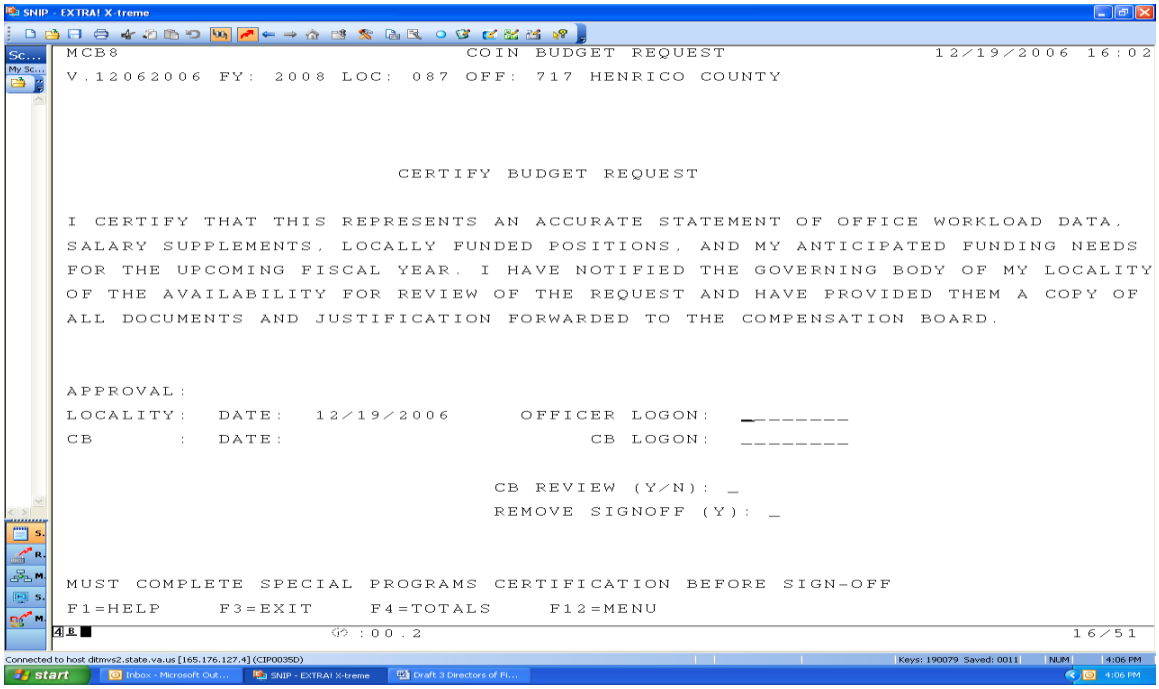
Purpose:

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

Navigational Path:

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

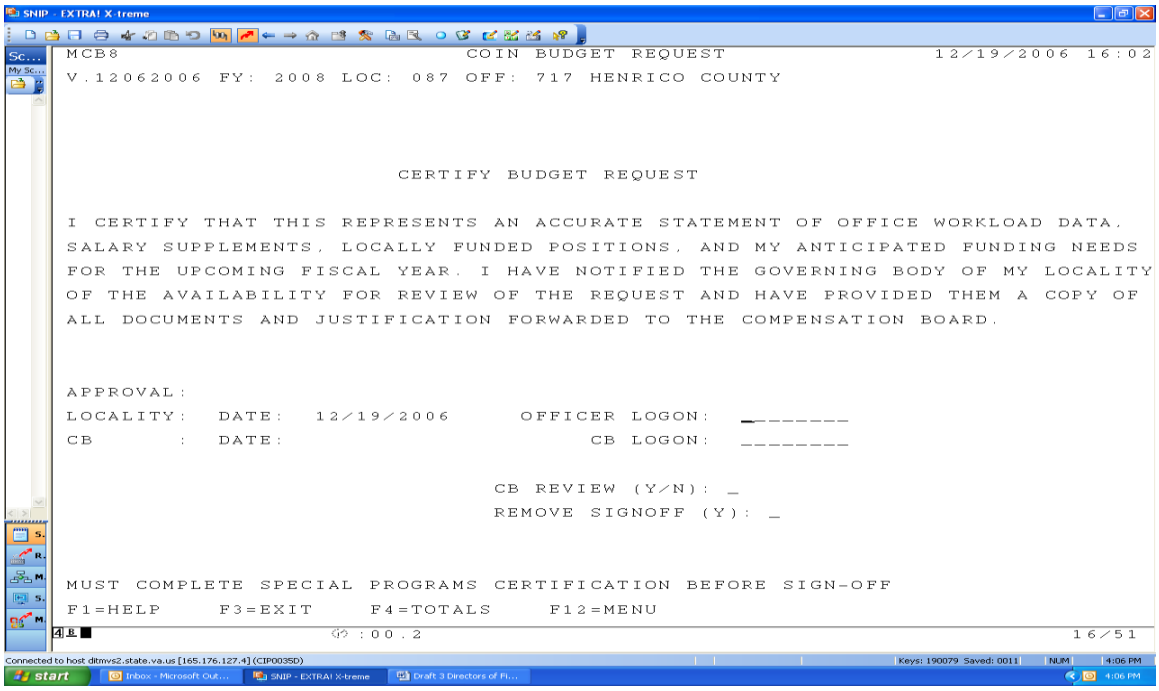
DIRECTORS OF FINANCE



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

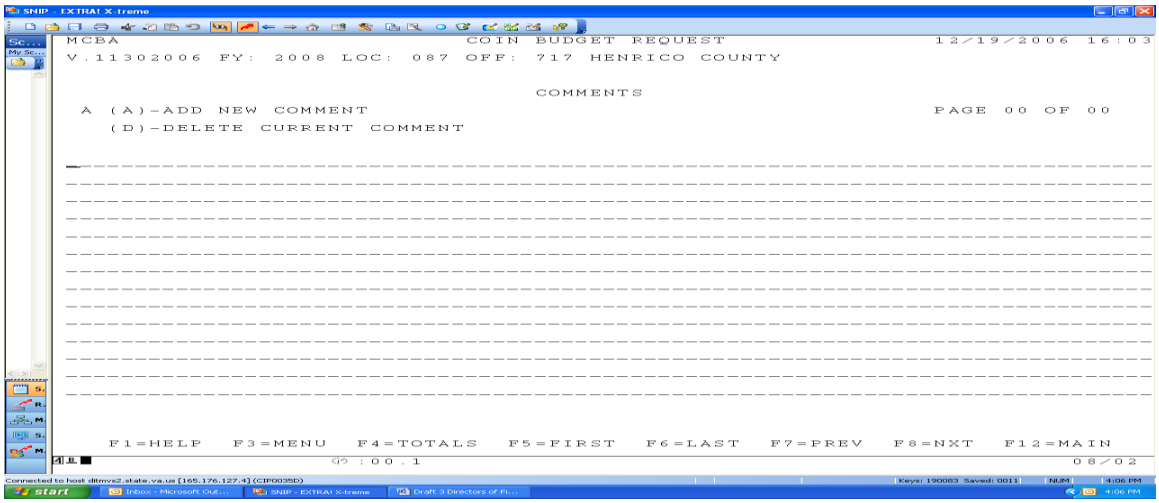
PURPOSE:

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

DIRECTORS OF FINANCE



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

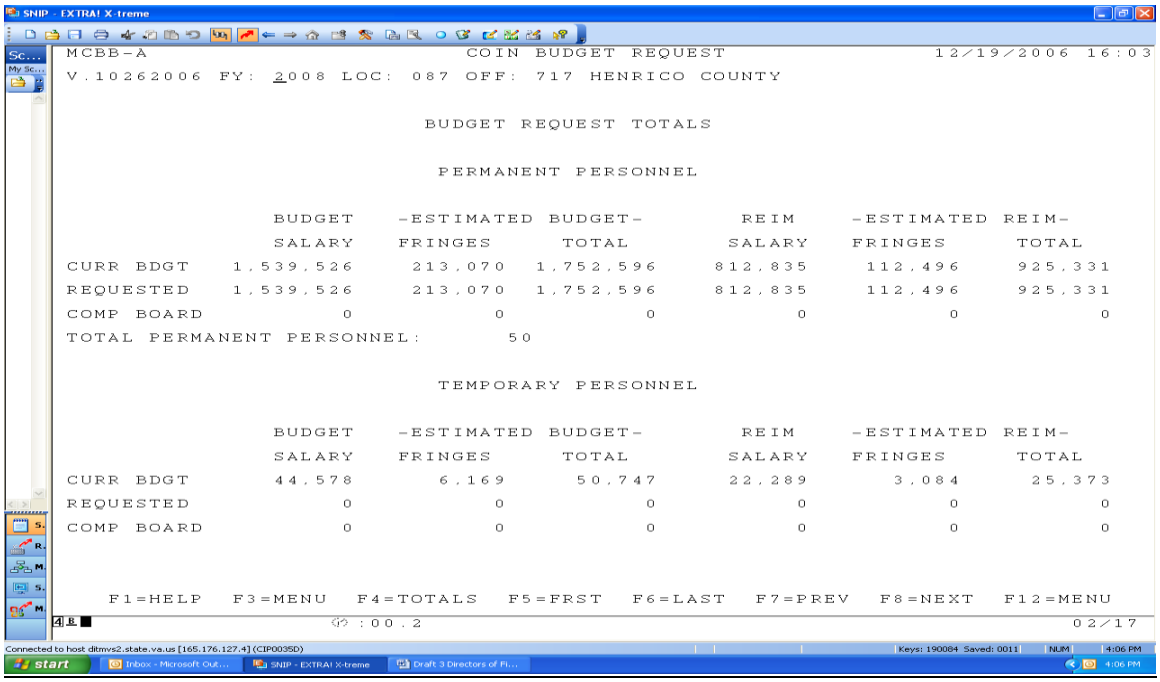
14. Function Key 'F4' - Budget Request Totals

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 16:03
V.10262006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT     1,539,526     213,070  1,752,596     812,835     112,496     925,331
REQUESTED     1,539,526     213,070  1,752,596     812,835     112,496     925,331
COMP BOARD            0           0          0           0           0           0
TOTAL PERMANENT PERSONNEL:       50

                               TEMPORARY PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT        44,578       6,169     50,747       22,289       3,084      25,373
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
```

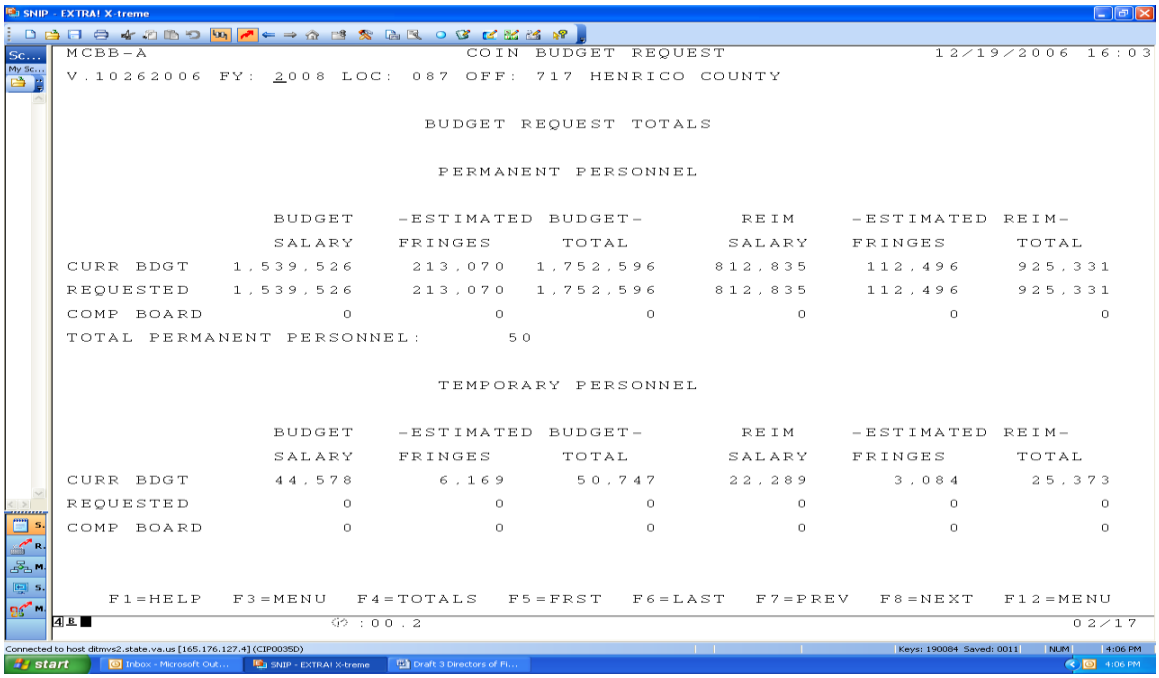
HELPFUL HINTS:

- 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

DIRECTORS OF FINANCE

1ST SCREEN OF 3:



```
MCBB-A                          COIN BUDGET REQUEST                    12/19/2006 16:03
V.10262006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT    1,539,526     213,070   1,752,596     812,835    112,496     925,331
REQUESTED    1,539,526     213,070   1,752,596     812,835    112,496     925,331
COMP BOARD           0           0           0           0          0           0
TOTAL PERMANENT PERSONNEL:       50

                               TEMPORARY PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT        44,578      6,169      50,747      22,289      3,084      25,373
REQUESTED             0          0           0           0          0           0
COMP BOARD            0          0           0           0          0           0

  F1=HELP   F3=MENU   F4=TOTALS   F5=FRST   F6=LAST   F7=PREV   F8=NEXT   F12=MENU
                                  :00.2                                     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'

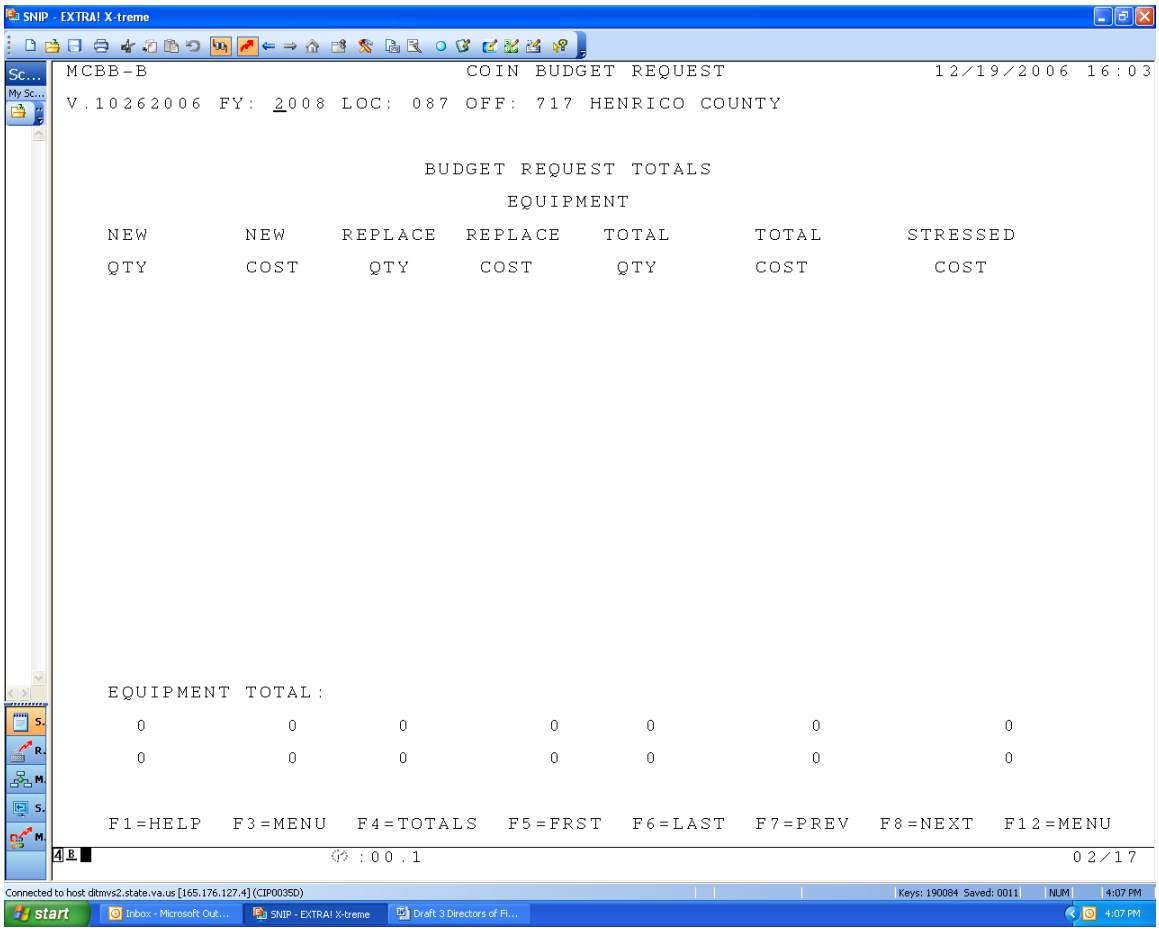
  - ✓ **'FRINGE'** benefits listed are estimates only

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

'F4' Budget Request Totals

DIRECTORS OF FINANCE

2ND SCREEN OF 3:

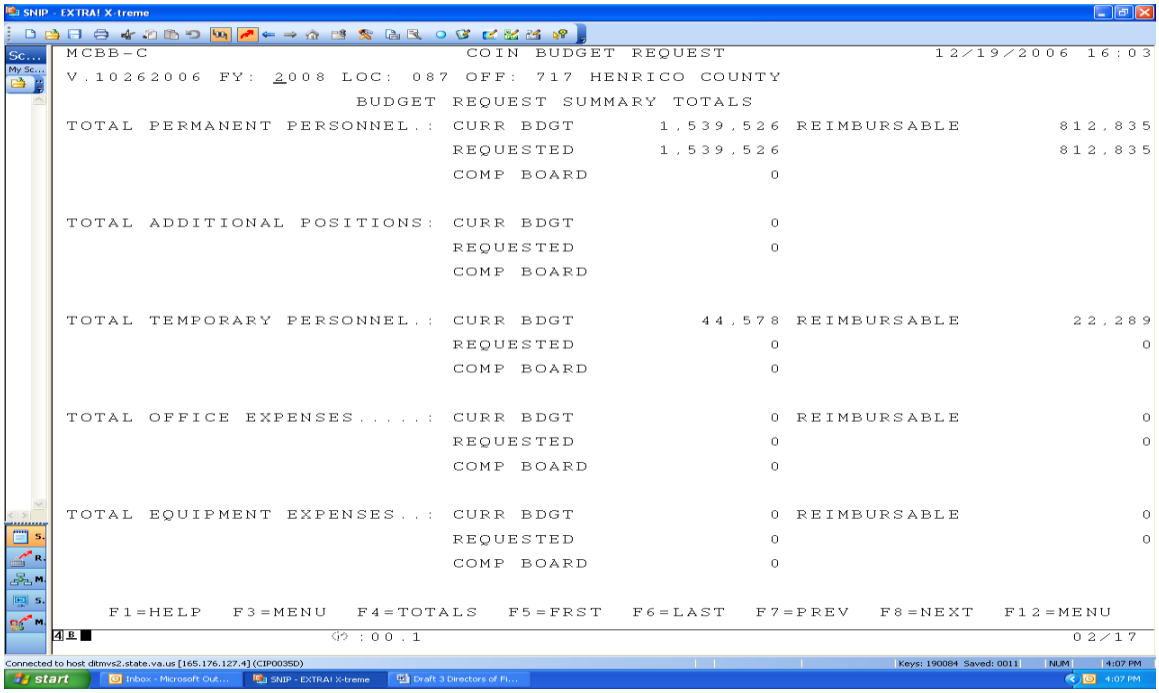


- **2ND SCREEN OF 3:**
  - ✓ This screen displays equipment totals by equipment category
  - ✓ **FIRST LINE** of information displayed relates to the request you have made or are in the process of making
    - This information is subject to change as you make revisions to your budget request
    - Line 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

DIRECTORS OF FINANCE

3RD SCREEN OF 3:



```
MCBB-C                          COIN BUDGET REQUEST                    12/19/2006  16:03
V.10262006 FY: 2008 LOC: 087 OFF: 717 HENRICO COUNTY
                          BUDGET REQUEST SUMMARY TOTALS
TOTAL PERMANENT PERSONNEL.: CURR BDGT       1,539,526 REIMBURSABLE          812,835
                            REQUESTED       1,539,526                       812,835
                            COMP BOARD              0

TOTAL ADDITIONAL POSITIONS: CURR BDGT               0
                            REQUESTED               0
                            COMP BOARD

TOTAL TEMPORARY PERSONNEL.: CURR BDGT          44,578 REIMBURSABLE           22,289
                            REQUESTED               0                            0
                            COMP BOARD              0

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

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

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

- **3RD SCREEN OF 3:**

  - ✓ Displays totals for each budget request broad-based category:
    - Permanent Personnel
    - Additional Positions
    - Temporary Personnel Funding
    - Office Expense Funding
    - Equipment Requests

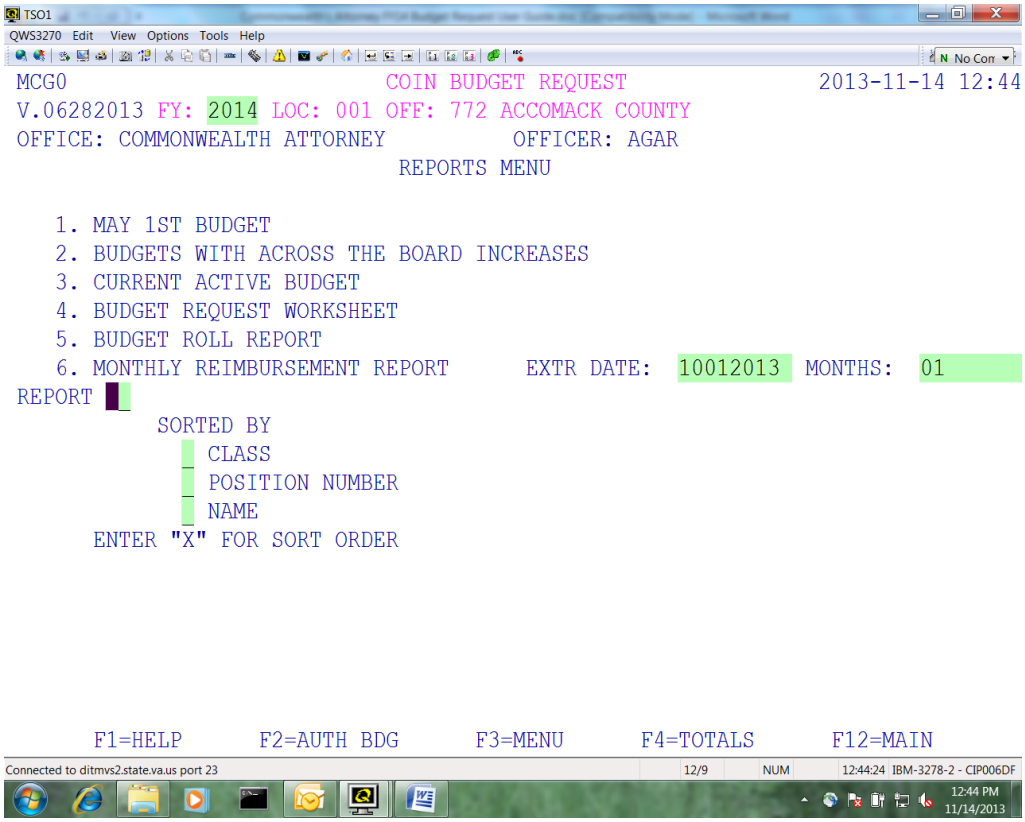
  - ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your current budget information as of December 31st

  - ✓ **'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'

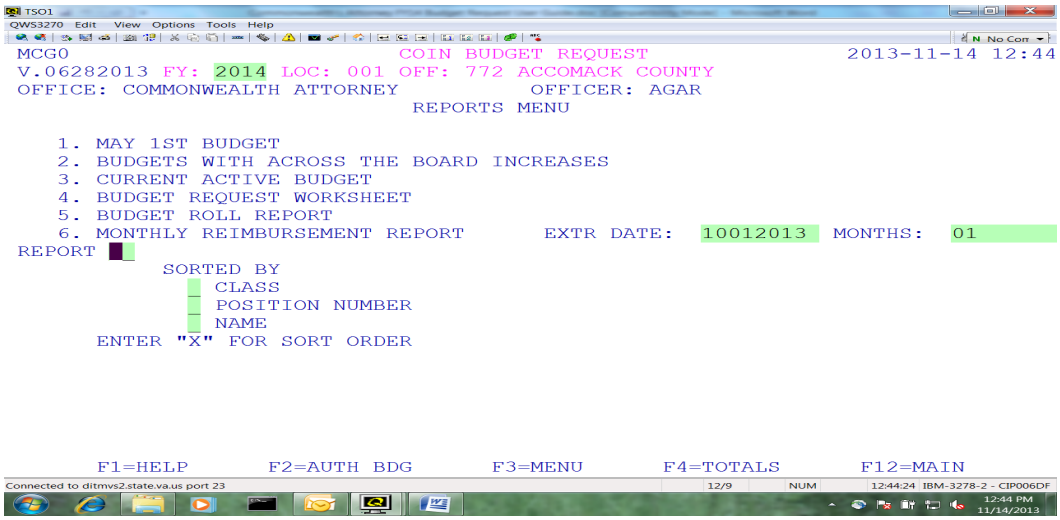
- Press 'F3' to exit the screen to the Budget Request Menu

15. Main Menu Option #5 Budget Reports



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

Main Menu Option #5 - Budget Reports



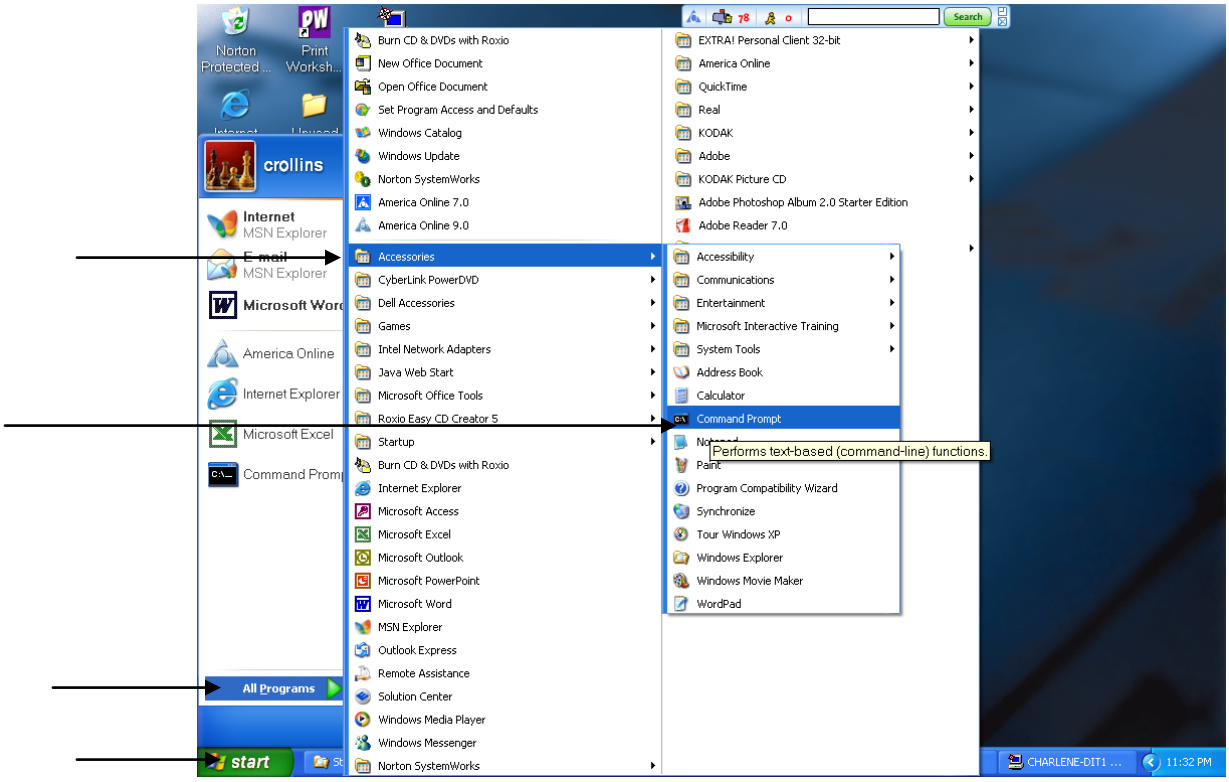
There are 6 versions of the Budget Report that are available.

- 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

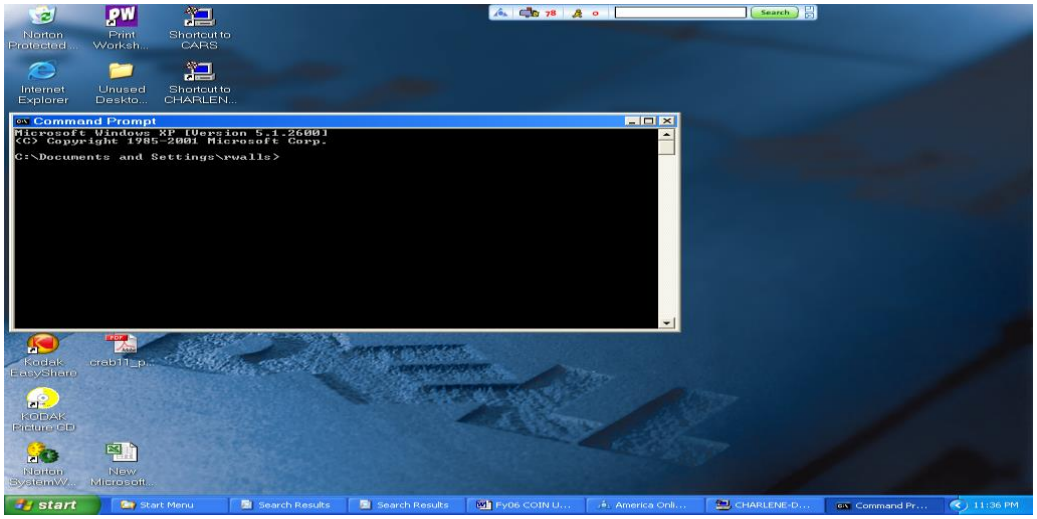
16. Download Instructions



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: ***scbte06*** *(lowercase)* Press the "Enter" key
5. -PASSWORD: ***scbte06*** *(lowercase* Press the "Enter" key
6. -TYPE: ***user*** *(lowercase)* Press the "Enter" key
7. -USERNAME: ***Type your COIN Userid*** *(lowercase)* Press the "Enter" key
8. -PASSWORD: ***Type your COIN password*** (lowercase) Press the "Enter" key
9. -TYPE: ***get*** Press the "Enter" key
10-TYPE: ***'scb.prod.coin.l001.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

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

Anne Wilmoth – anne.wilmoth@scb.virginia.gov
Dan Munson – dan.munson@scb.virginia.gov
Melanie Morrison- melanie.morrison@scb.virginia.gov

Page Intentionally Left Blank

17. Appendix

Classifications And Pay Plans

DIRECTORS OF FINANCE

CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE DIRECTOR OF FINANCE
SEPTEMBER 1, 2015 - JUNE 30, 2016

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
GENERAL OFFICE CLERK CLERK TYPIST II	GC/CTII	1	Administrative	20,861	39,262
FISCAL ASSISTANT DEPUTY I SECRETARY I	FA/DI/SECI				
DEPUTY II SECRETARY II	DII/SECII	2	Sr. Administrative	24,924	47,977
DEPUTY III ADMINISTRATIVE ASSISTANT	DIII/AA	4	Professional	29,797	61,273
DEPUTY IV	DIV				
CHIEF DEPUTY I	CDI	7	Sr. Professional	35,600	80,026
CHIEF DEPUTY II	CDII				
CHIEF DEPUTY III	CDIII	8	Supervisory/ Management	46,288	122,232
CHIEF DEPUTY IV	CDIV				

*** 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.**