Constitutional Officer Information Network

C•IN

Budget Request Guide

Treasurers

Compensation Board
December 1, 2016

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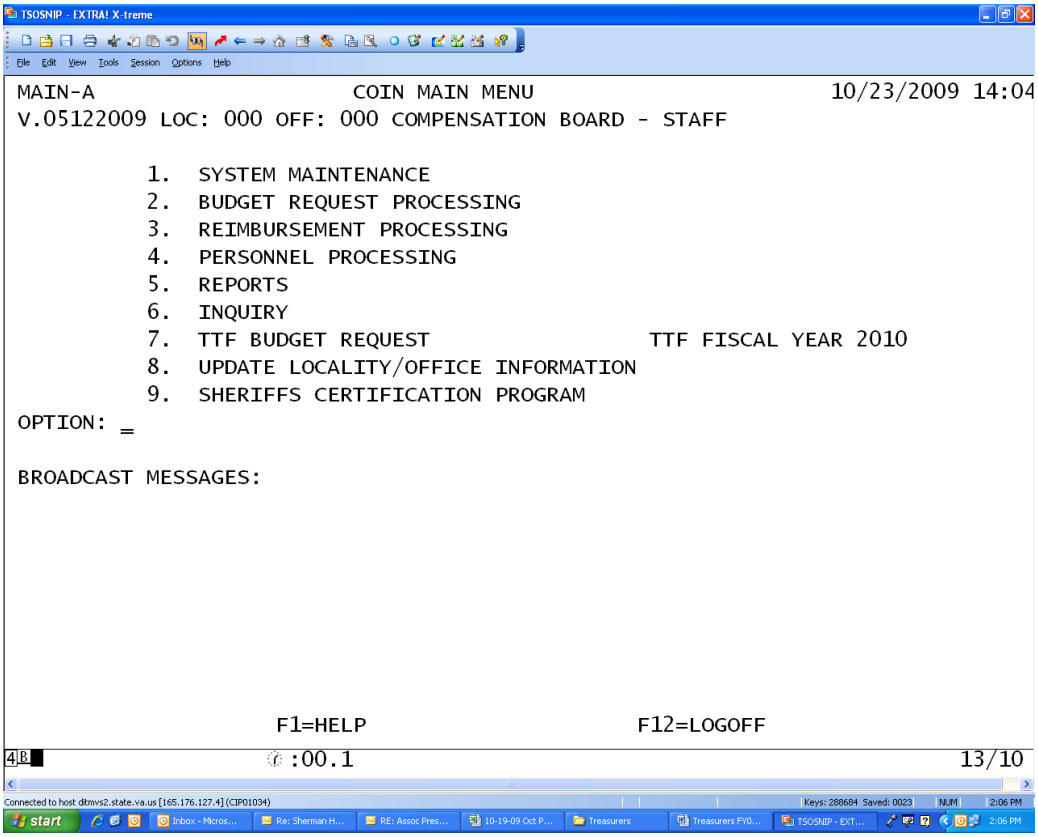
1. COIN MAIN MENU



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

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

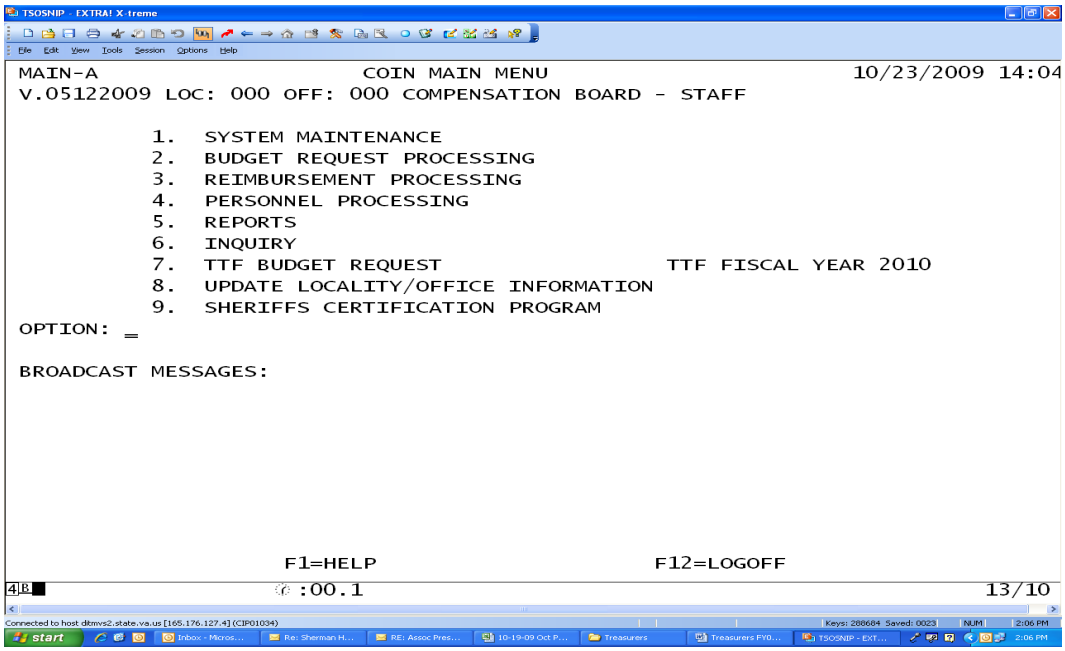
Purpose:

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

Navigational Path

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

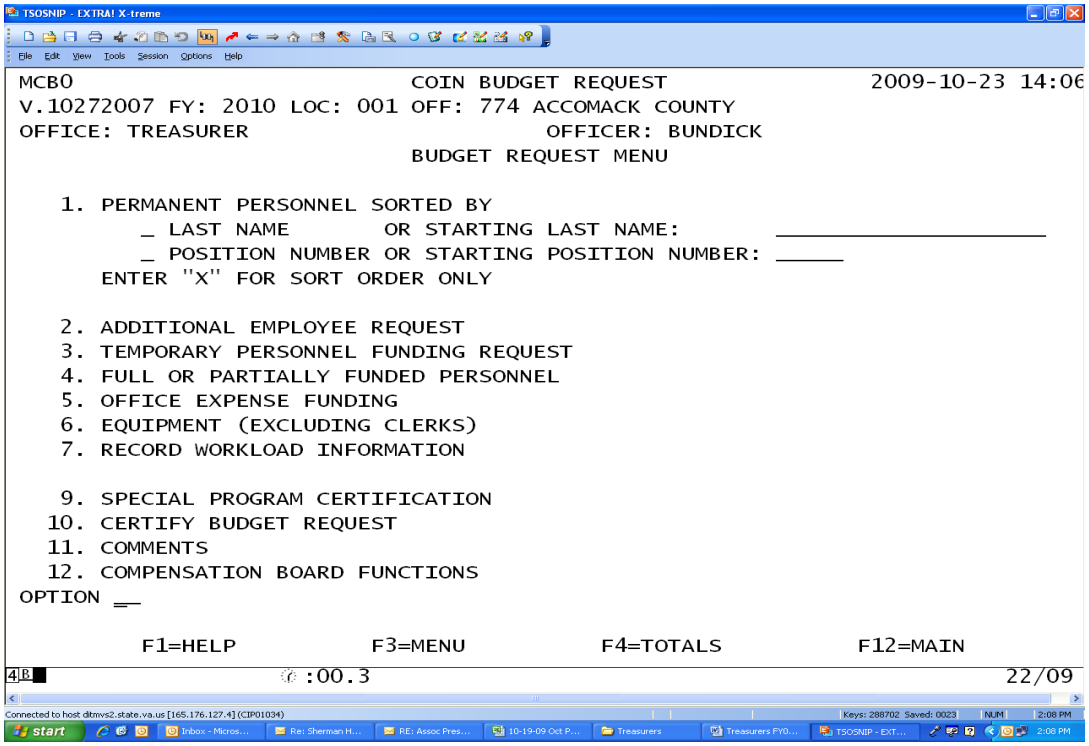
TREASURERS



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                2009-10-23 14:06
V.10272007 FY: 2010 LOC: 001 OFF: 774 ACCOMACK COUNTY
OFFICE: TREASURER                        OFFICER: BUNDICK
                              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 __

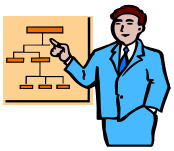
         F1=HELP          F3=MENU          F4=TOTALS          F12=MAIN
```

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

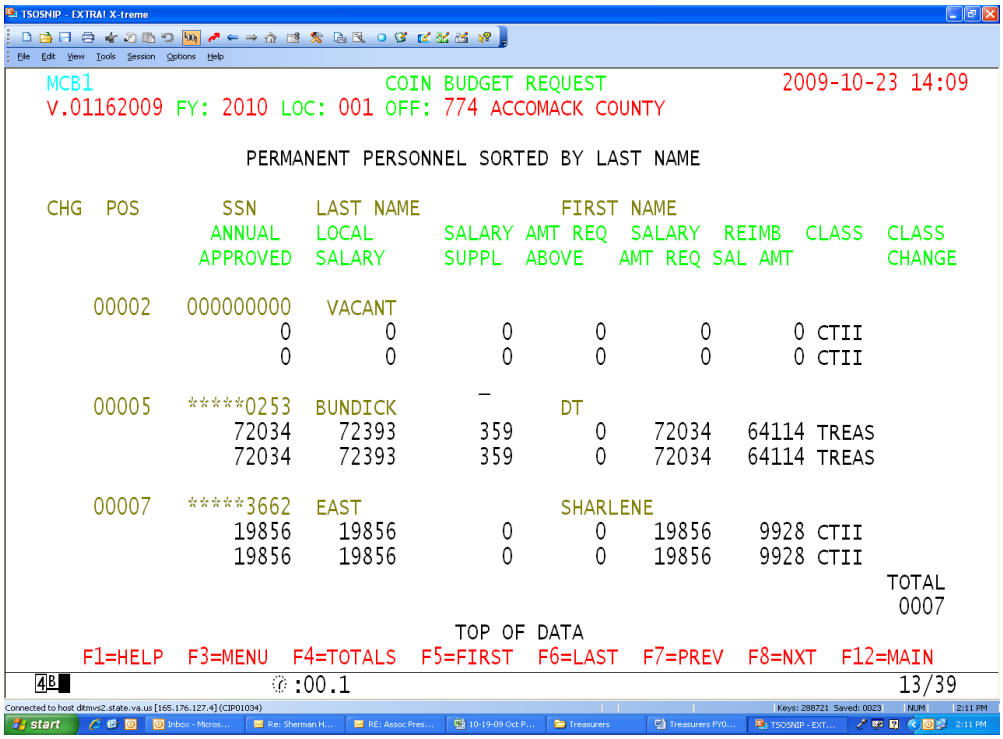
Purpose:

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 CB Annual salary may be changed by entering a personnel action. 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

TREASURERS



```
MCB1                          COIN BUDGET REQUEST                2009-10-23 14:09
V.01162009 FY: 2010 LOC: 001 OFF: 774 ACCOMACK COUNTY

                 PERMANENT PERSONNEL SORTED BY LAST NAME

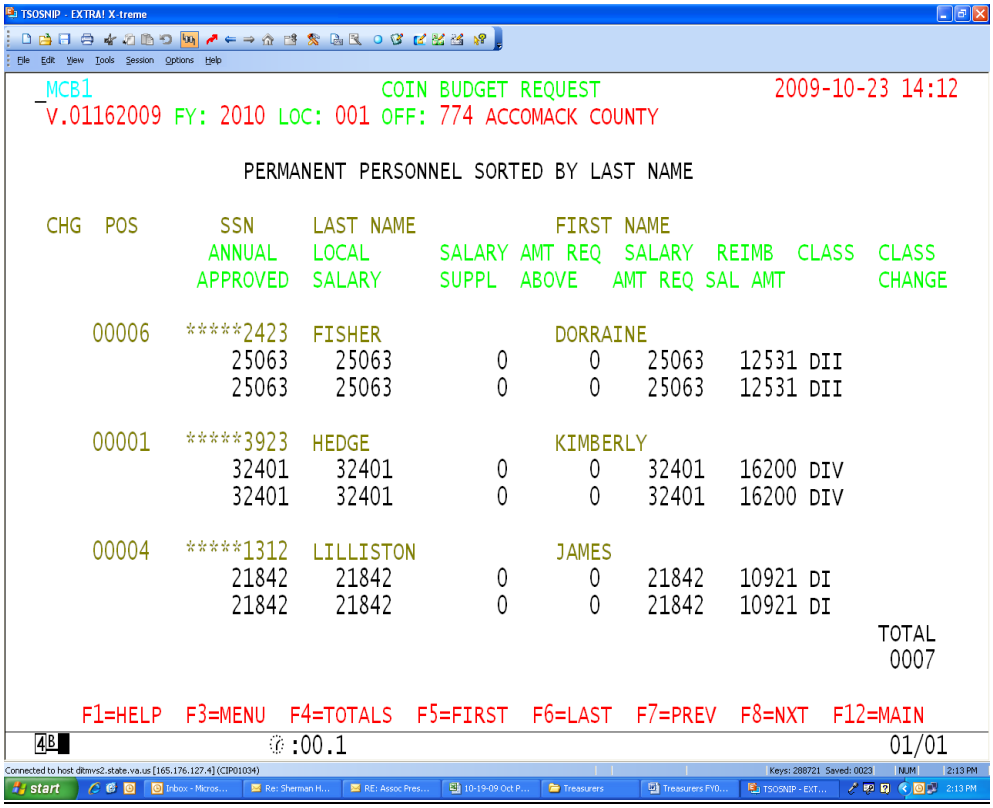
CHG  POS       SSN      LAST NAME            FIRST NAME
             ANNUAL     LOCAL      SALARY AMT REQ  SALARY  REIMB  CLASS  CLASS
            APPROVED    SALARY     SUPPL  ABOVE   AMT REQ SAL AMT        CHANGE

    00002   000000000    VACANT
                  0         0         0       0        0       0 CTII
                  0         0         0       0        0       0 CTII

    00005   *****0253   BUNDICK          _       DT
              72034     72393       359       0    72034   64114 TREAS
              72034     72393       359       0    72034   64114 TREAS

    00007   *****3662   EAST                     SHARLENE
              19856     19856         0       0    19856    9928 CTII
              19856     19856         0       0    19856    9928 CTII
                                                                      TOTAL
                                                                       0007
                                   TOP OF DATA
   F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
4B                  :00.1                                                13/39
```

Option #1, Permanent Personnel



```
MCB1                          COIN BUDGET REQUEST                2009-10-23 14:12
V.01162009 FY: 2010 LOC: 001 OFF: 774 ACCOMACK 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

     00006  *****2423  FISHER               DORRAINE
                25063    25063         0       0    25063   12531 DII
                25063    25063         0       0    25063   12531 DII

     00001  *****3923  HEDGE                KIMBERLY
                32401    32401         0       0    32401   16200 DIV
                32401    32401         0       0    32401   16200 DIV

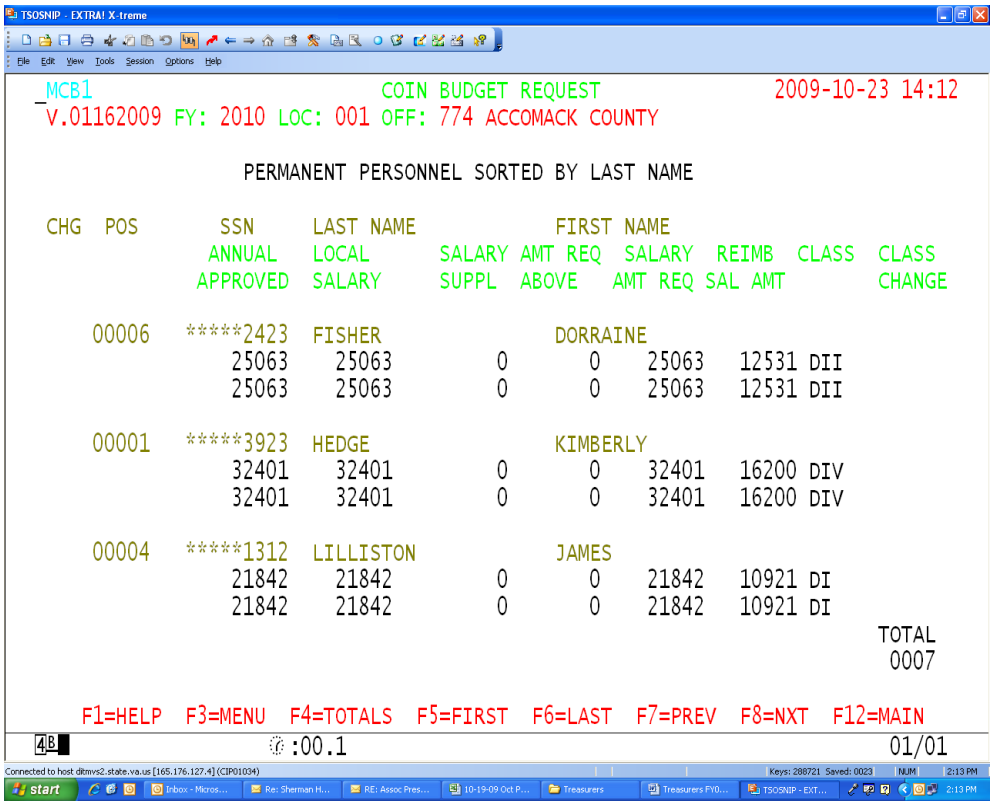
     00004  *****1312  LILLISTON            JAMES
                21842    21842         0       0    21842   10921 DI
                21842    21842         0       0    21842   10921 DI
                                                                      TOTAL
                                                                       0007

   F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
4B                  :00.1                                              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

Option #1, Permanent Personnel



```
MCB1                          COIN BUDGET REQUEST                2009-10-23 14:12
V.01162009 FY: 2010 LOC: 001 OFF: 774 ACCOMACK 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

     00006  *****2423  FISHER               DORRAINE
                25063    25063         0       0    25063   12531 DII
                25063    25063         0       0    25063   12531 DII

     00001  *****3923  HEDGE                KIMBERLY
                32401    32401         0       0    32401   16200 DIV
                32401    32401         0       0    32401   16200 DIV

     00004  *****1312  LILLISTON            JAMES
                21842    21842         0       0    21842   10921 DI
                21842    21842         0       0    21842   10921 DI
                                                                      TOTAL
                                                                       0007

   F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
4B                  :00.1                                              01/01
```

PROCEDURES:

Annual Approved: Supplied by CB (Can be changed by entering a personnel action or CB10)

Local Salary: Enter the total salary 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 "Enter" 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

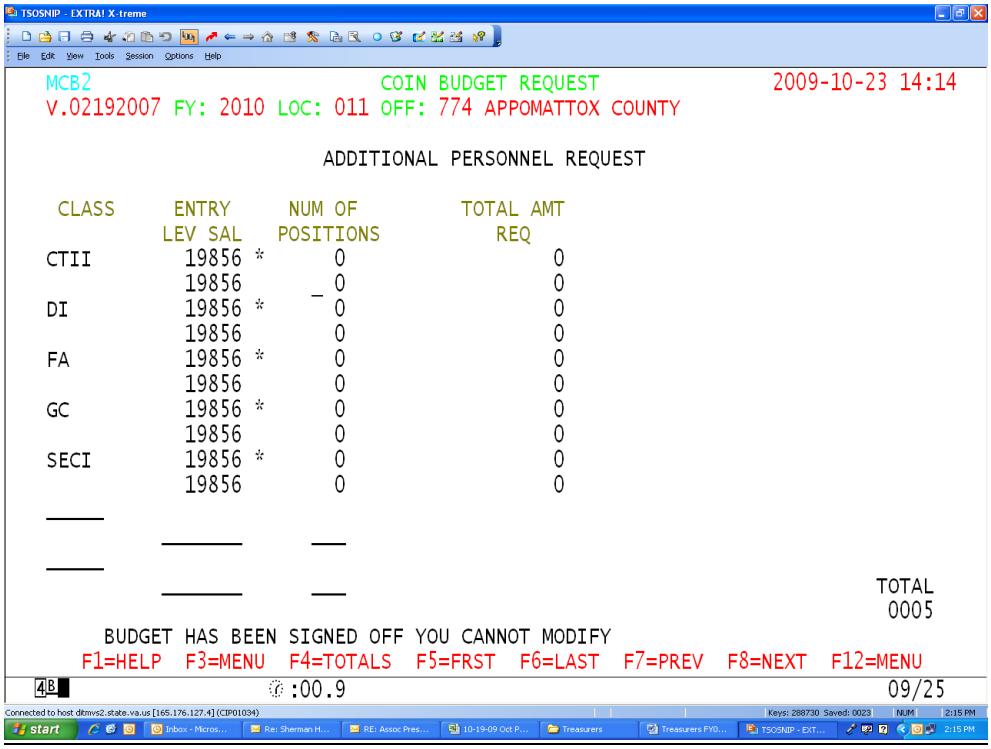
4. Option #2, Additional Personnel Request

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:

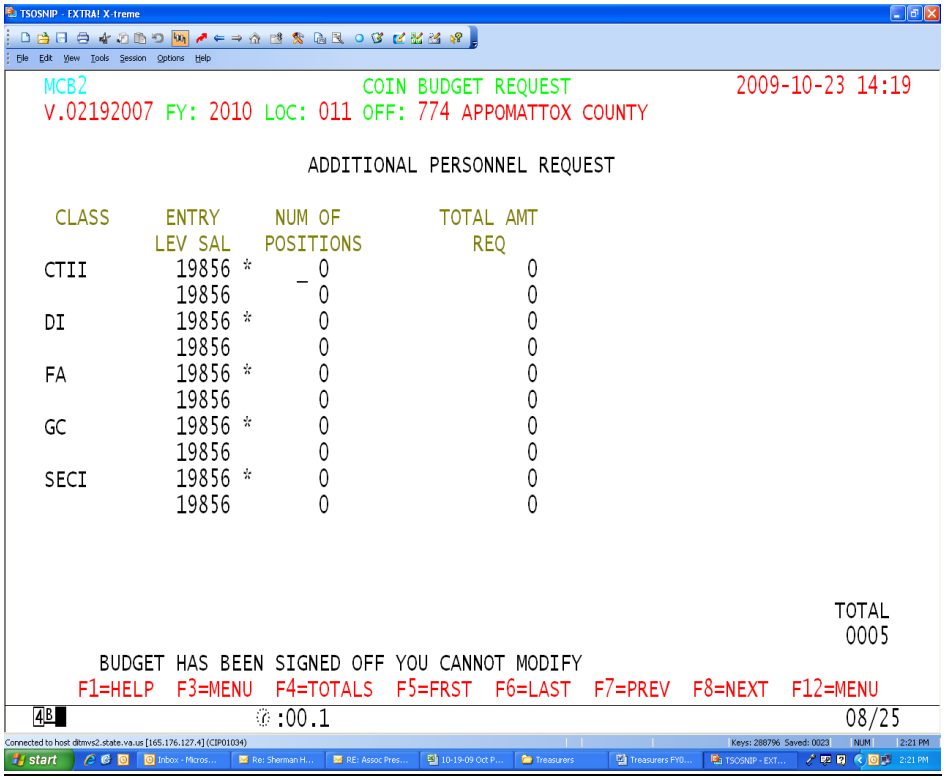
- Coin Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #2, Additional Personnel Request



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 FY18, as they were in FY17, 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

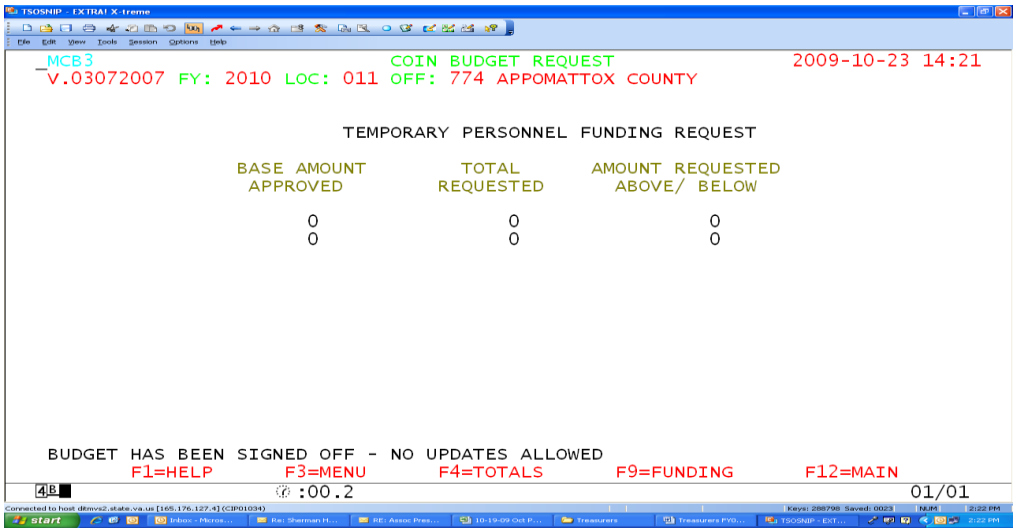
Purpose:

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

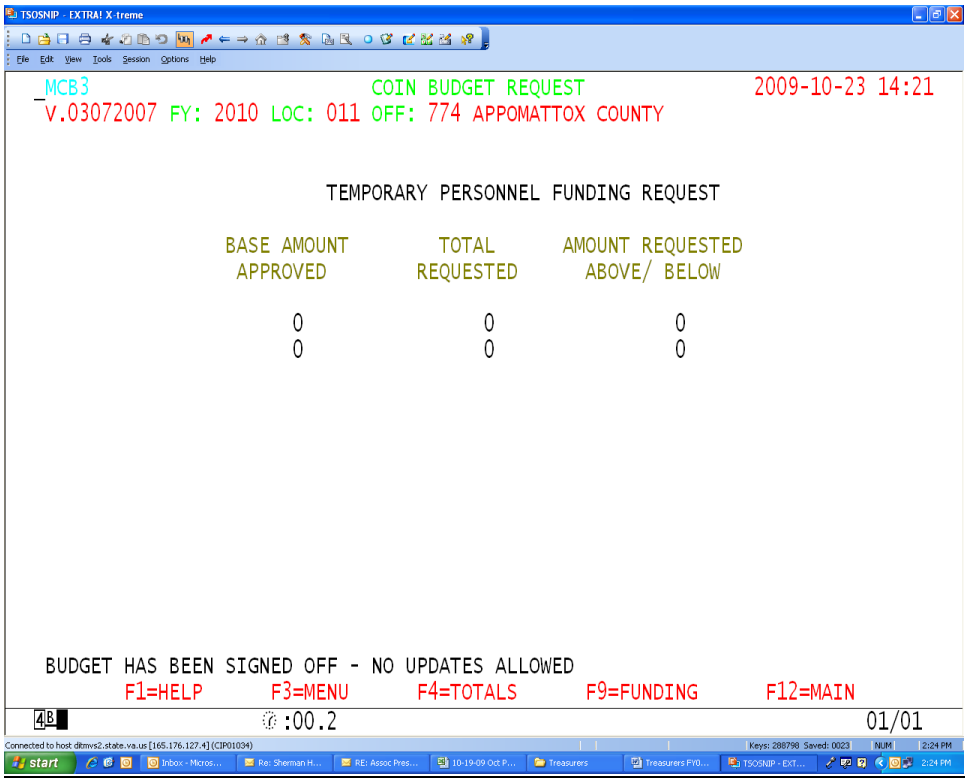
TREASURERS



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

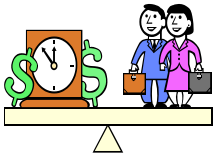
Option #3, Temporary Personnel Fund Request



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

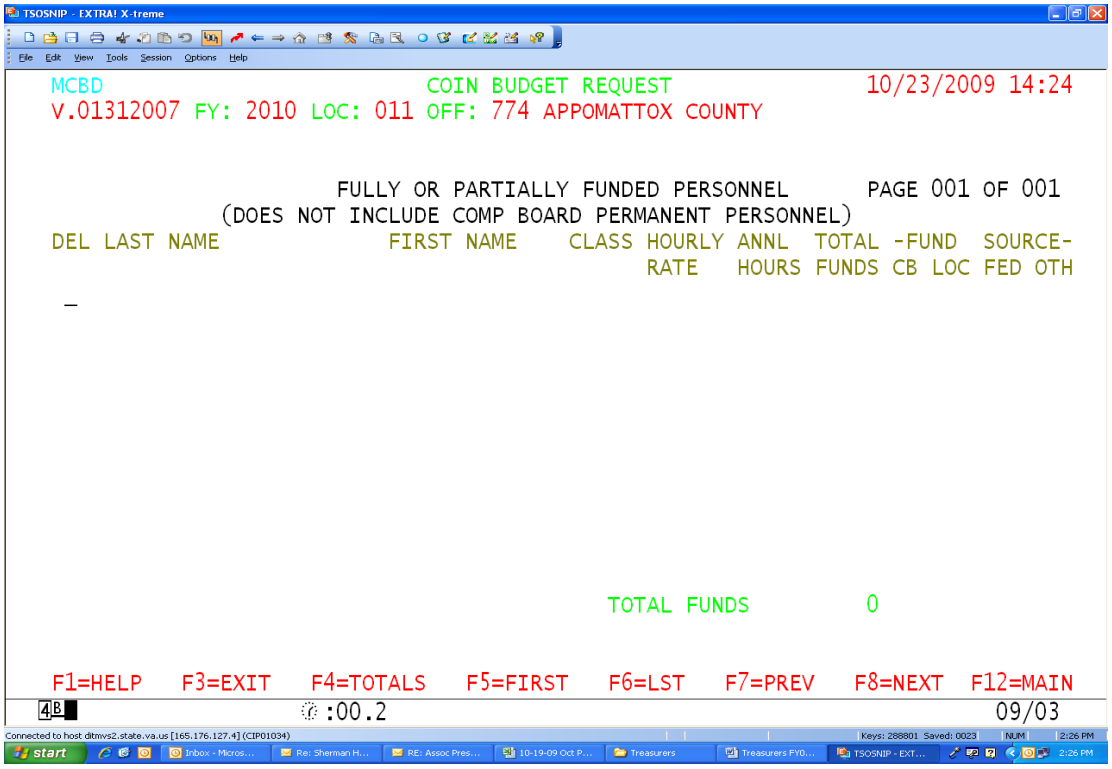
Purpose:

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.

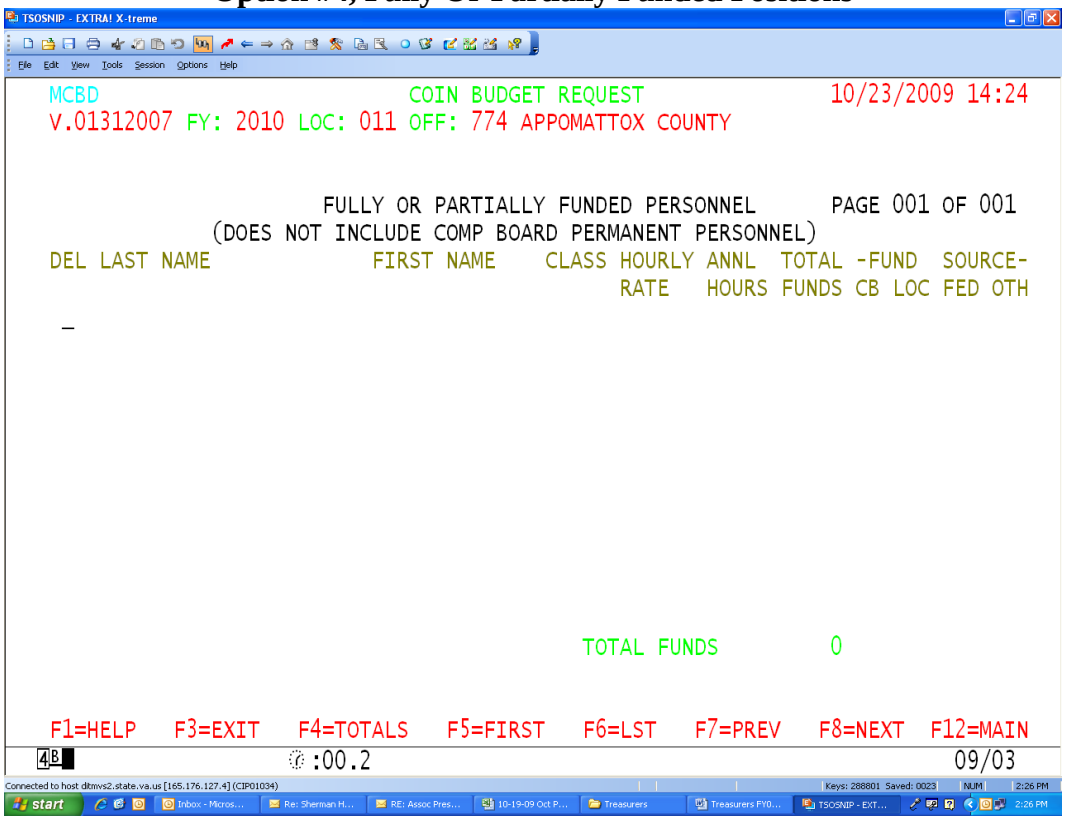
Navigational Path:

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

TREASURERS



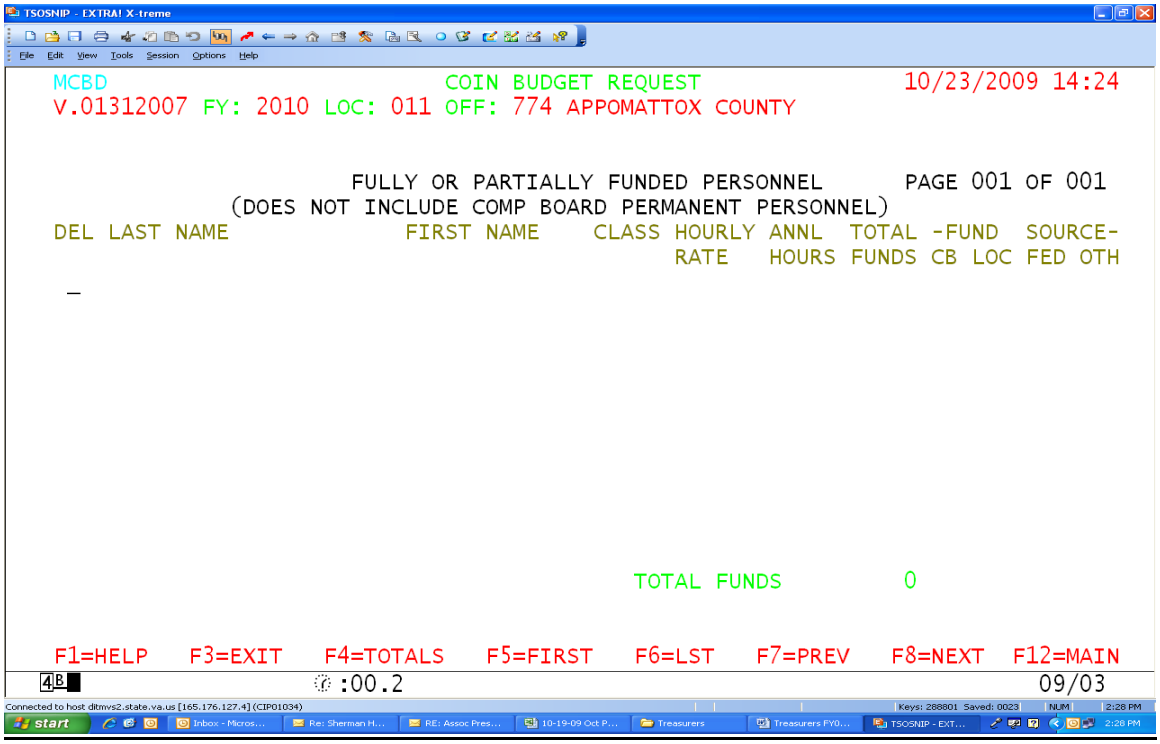
Option #4, Fully Or Partially Funded Positions



Helpful Hints:

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

Option #4, Fully Or Partially Funded Positions



Procedures:

Del:	Enter 'D' to delete entry
Last Name:	Enter the employee's last name; if Vacant, type "Vacant"
First Name:	Enter the employee's first name if known; if 'Vacant' this data field may be left blank because the system will look for 'Vacant' in the 'Last Name' data field
Class:	Enter the employee's class (Does not have to be a CB classification)
Hourly Rate:	Enter the employee's hourly wage rate
Annl Hours:	Enter the total number of hours worked <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

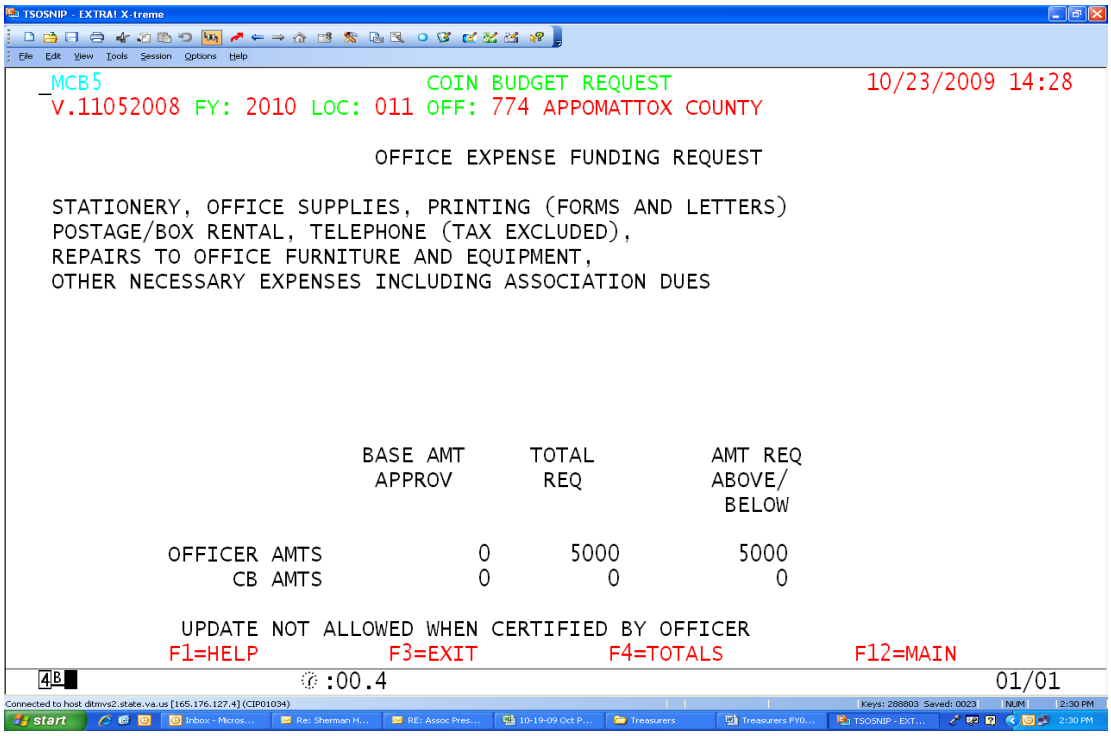
Purpose:

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

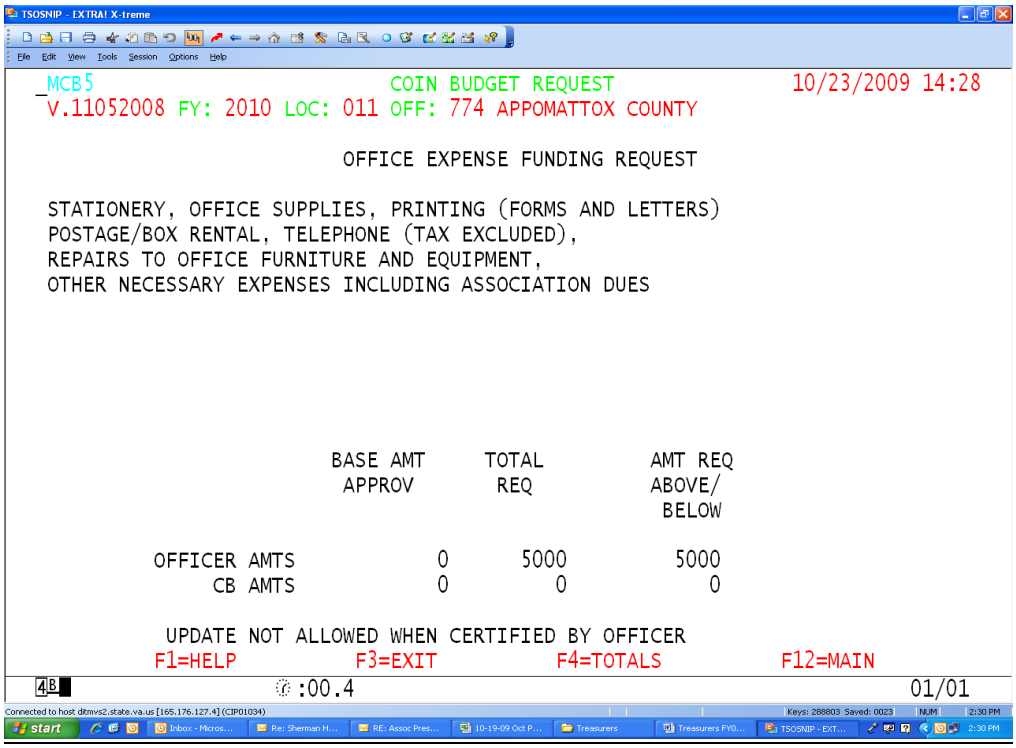
TREASURERS



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

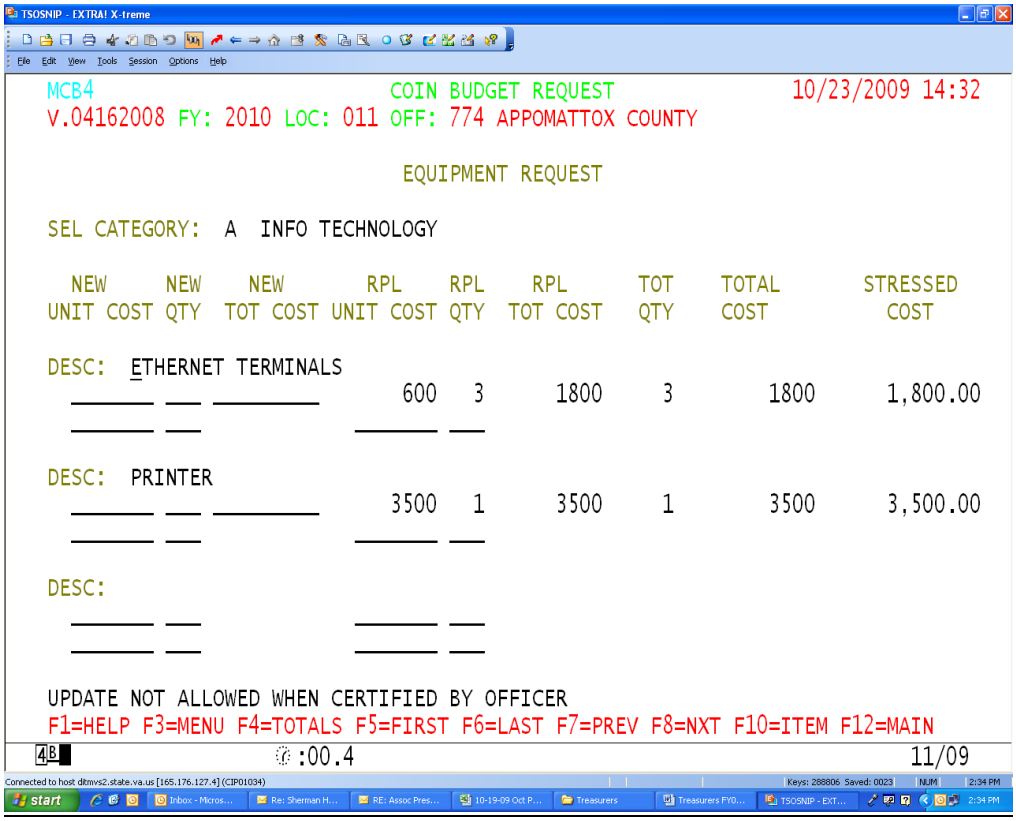
8. Option #6, Equipment

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:

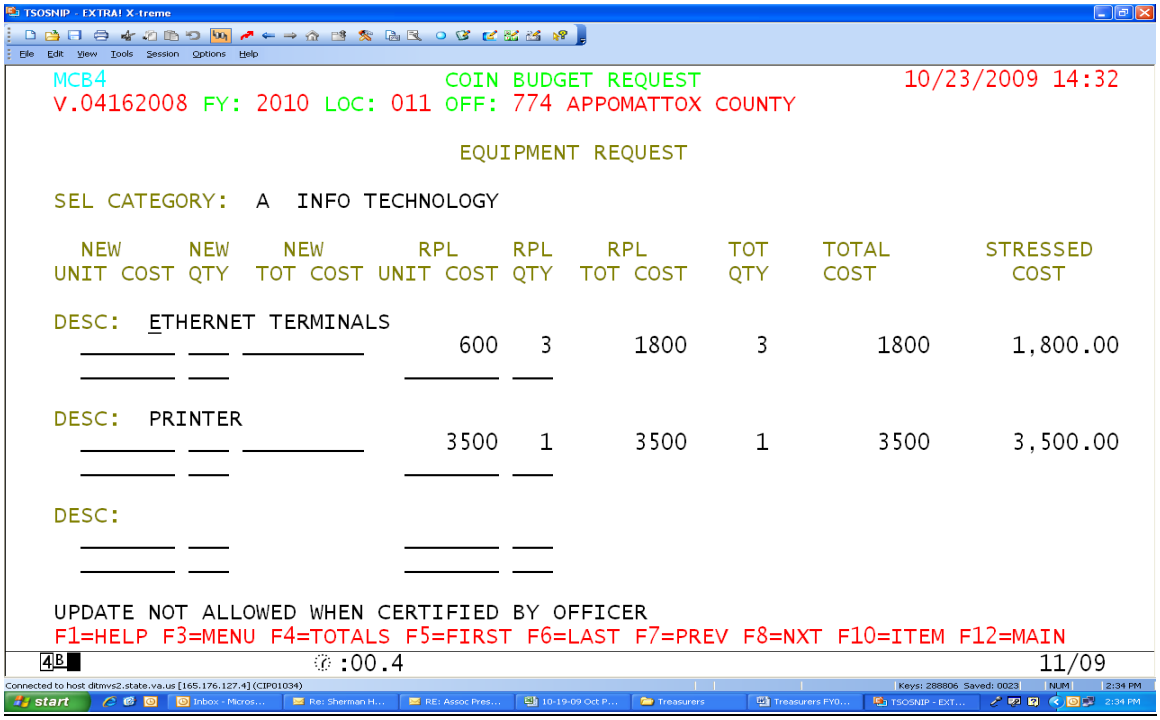
- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #6, Equipment



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



```
MCB4                          COIN BUDGET REQUEST                 10/23/2009 14:32
V.04162008 FY: 2010 LOC: 011 OFF: 774 APPOMATTOX COUNTY

                               EQUIPMENT REQUEST

SEL CATEGORY:  A  INFO TECHNOLOGY

  NEW      NEW     NEW        RPL     RPL     RPL       TOT     TOTAL        STRESSED
UNIT COST QTY  TOT COST UNIT COST QTY  TOT COST    QTY     COST           COST

DESC:  ETHERNET TERMINALS
  _______ ___ _________       600   3      1800      3        1800       1,800.00
  _______ ___             _______ ___

DESC:  PRINTER
  _______ ___ _________      3500   1      3500      1        3500       3,500.00
  _______ ___             _______ ___

DESC:
  _______ ___             _______ ___
  _______ ___             _______ ___

UPDATE NOT ALLOWED WHEN CERTIFIED BY OFFICER
F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN
4B                          :00.4                                        11/09
```

Procedures:

- User will select and input the equipment category they wish to request
  - ✓ Category 'A', IT Equipment
  - ✓ Category 'B', Office Equipment
  - ✓ Category 'C', Furniture
- To proceed to your next equipment category, enter in your next 'SEL CATEGORY'

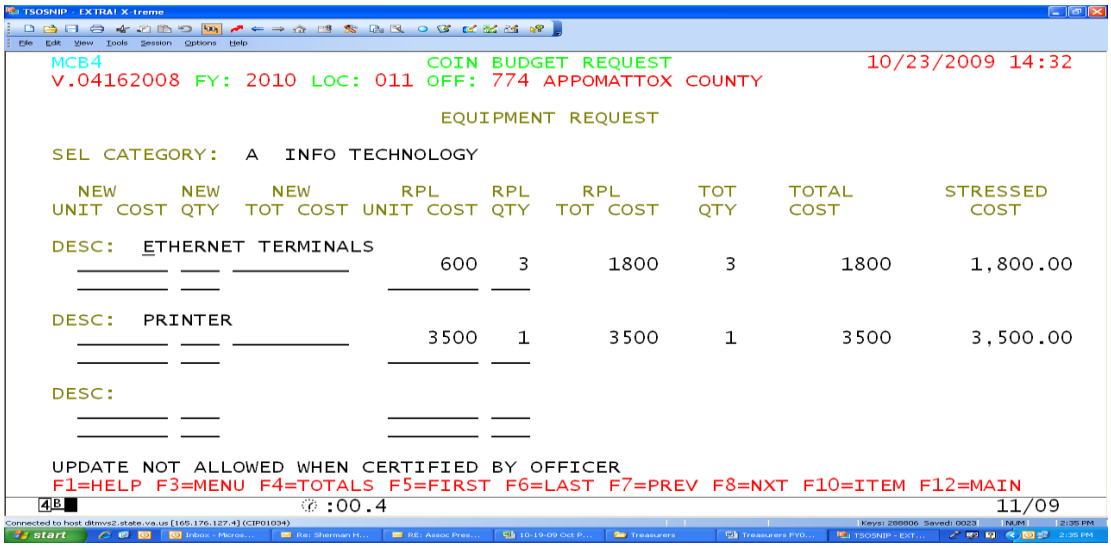
DESC:	List requested equipment or utilize the 'F1' help function	
New Unit Cost:	Enter unit cost of the new equipment requested	
New Qty:	Enter the quantity here, if this is New equipment not presently owned	
New Total Cost:	Calculated	
RPL Unit Cost:	Enter unit cost of the replacement equipment requested	
RPL Qty:	Enter the quantity here, if this is Replacement equipment for existing equipment being replaced	
RPL Total Cost:	Calculated	
Total Qty:	Calculated	(New + Replacement)
Total Cost:	Calculated	(New + Replacement)
Stressed Cost:	Calculated	(See Operating Manual)

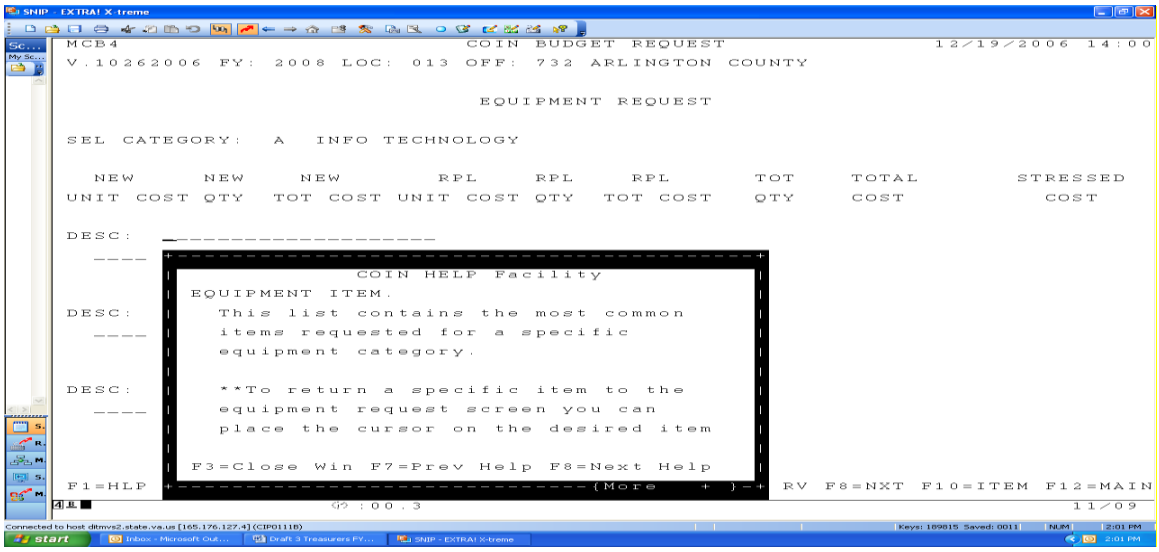
- Press the "Enter" key after all information has been entered
- Press '**F8= Next**' key to proceed to the next screen if additional screens are needed for your equipment request
- Press '**F3 = Exit**' to exit the screen to the Budget Request Menu
- Press 'F4' to display "Totals" for your office

Option #6, Equipment

TREASURERS

Category A – Information Technology (It) Equipment





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

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

Option #6, Equipment

TREASURERS

Category B – Office Equipment

```
MCB4                          COIN BUDGET REQUEST                 09/27/2011 14:44
V.11242010 FY: 2013 LOC: 157 OFF: 774 RAPPAHANNOCK COUNTY

                               EQUIPMENT REQUEST

SEL CATEGORY:  B  OFFICE EQUIPMNT

  NEW     NEW    NEW       RPL    RPL    RPL      TOT    TOTAL       STRESSED
UNIT COST QTY  TOT COST UNIT COST QTY  TOT COST   QTY    COST          COST

DESC:  COPIER______________
  8000___ 1__             _______ ___


DESC:  FAX MACHINE_________
  200____ 1__             _______ ___


DESC:  ____________________
  _______ ___             _______ ___



F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN
4B                        :00.1                                        16/13
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Category C – Furniture Equipment

```
MCB4                          COIN BUDGET REQUEST                 09/27/2011 14:50
V.11242010 FY: 2013 LOC: 157 OFF: 774 RAPPAHANNOCK COUNTY

                              EQUIPMENT REQUEST

SEL CATEGORY:  C  FURNITURE

  NEW     NEW    NEW       RPL    RPL    RPL      TOT    TOTAL       STRESSED
UNIT COST QTY  TOT COST UNIT COST QTY  TOT COST   QTY    COST          COST

DESC:  DESK_______________
  400____ 1__             _______ ___


DESC:  CHAIR______________
  250____ 1__             _______ ___


DESC:  TABLE______________
  300____ 1__             _______ ___



F1=HELP F3=MENU F4=TOTALS F5=FIRST F6=LAST F7=PREV F8=NXT F10=ITEM F12=MAIN
                          :00.1                                        20/13
```

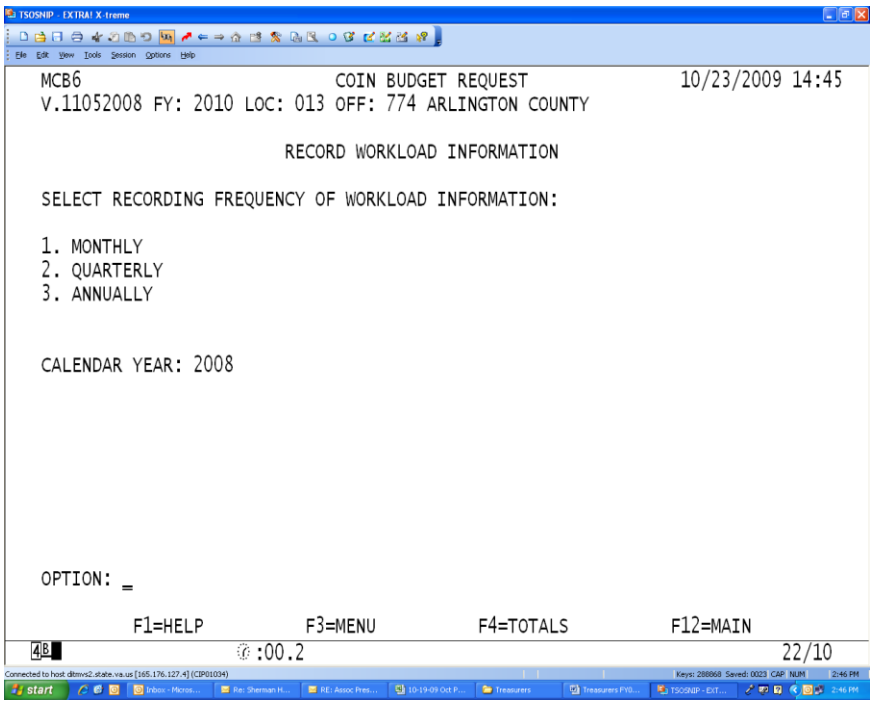
9. Option #7, Record Workload Information

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



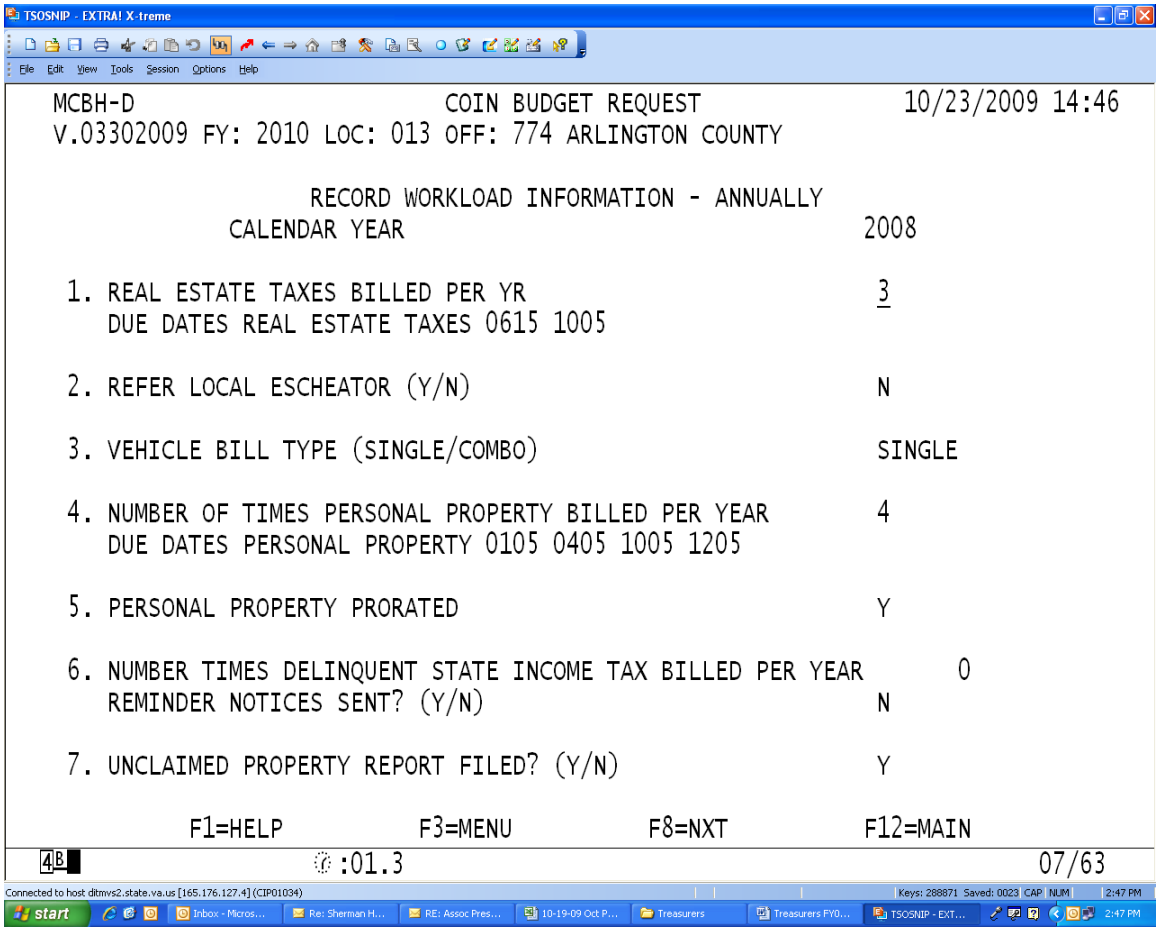
- In January 2017 offices must record one full year of workload data for Calendar Year (CY) 2016
- Provide requested information in accordance with Section 15.2-1636.7, Code of Virginia. Information requested is based **on the most recent calendar year**
- Select 'Option 3' and press the "Enter" key to proceed to the next screen
- The Workload Measures screens must be processed and an amount must be entered for each workload measure for the most recent ending calendar year
  - ✓ The screens will also display the amounts for the previous two calendar years
  - ✓ Enter the number of transactions for each workload measure listed; if not applicable to your office, enter '0', and "TAB" to the next field
  - ✓ **Do Not Leave Blanks** or the system will default the item to zero
- Press **'F3=Exit'** to exit the screen to the Budget Request Menu
- 'F12=Main' returns you to the COIN Main Menu

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

Option #7 Record Workload Information

Option #3 Annual Screens

Screen 1 of 6

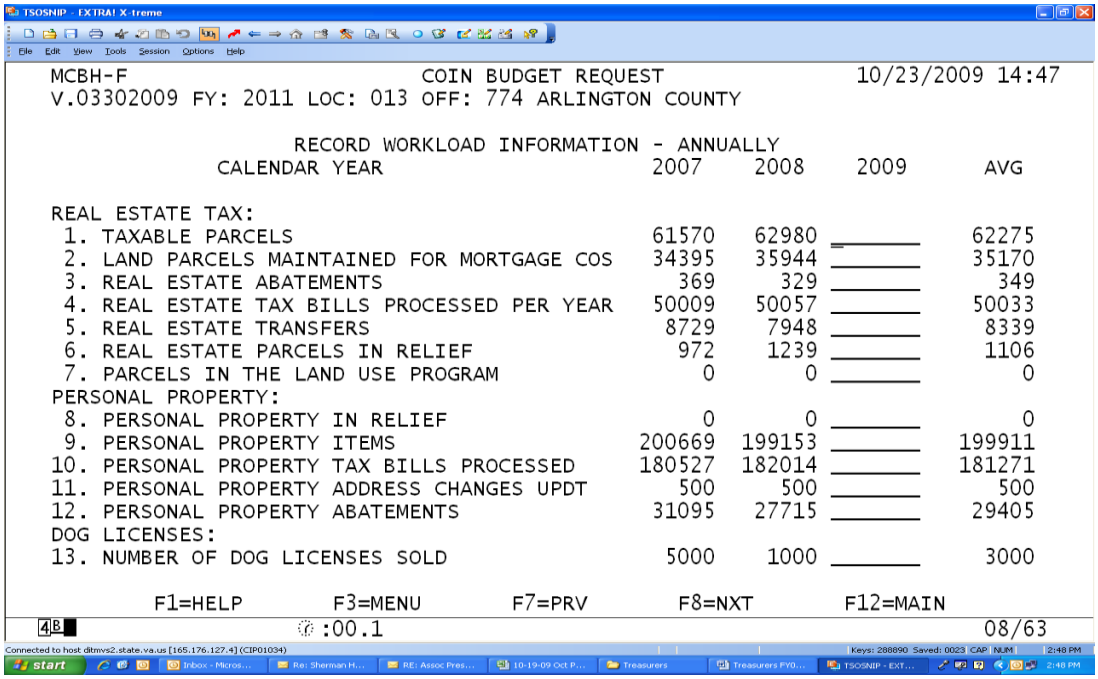


1. Enter the number of times per year Real Estate Taxes are billed and the month and year of the due date(s) (For example, February 2016 would be entered as '0216')
2. Enter 'Y' or 'N' for Refer Local Escheator
3. Enter the type of vehicle bill (either single or combo)
4. Enter the number of times per year Personal Property Taxes are billed and month and year of the due date(s) (For example, February 2016 would be entered as '0216')
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 6



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MCBH-F                          COIN BUDGET REQUEST                10/23/2009 14:47
V.03302009 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                       2007    2008    2009      AVG

REAL ESTATE TAX:
 1. TAXABLE PARCELS                               61570   62980 _______    62275
 2. LAND PARCELS MAINTAINED FOR MORTGAGE COS      34395   35944 _______    35170
 3. REAL ESTATE ABATEMENTS                          369     329 _______      349
 4. REAL ESTATE TAX BILLS PROCESSED PER YEAR      50009   50057 _______    50033
 5. REAL ESTATE TRANSFERS                          8729    7948 _______     8339
 6. REAL ESTATE PARCELS IN RELIEF                   972    1239 _______     1106
 7. PARCELS IN THE LAND USE PROGRAM                   0       0 _______        0
PERSONAL PROPERTY:
 8. PERSONAL PROPERTY IN RELIEF                       0       0 _______        0
 9. PERSONAL PROPERTY ITEMS                      200669  199153 _______   199911
10. PERSONAL PROPERTY TAX BILLS PROCESSED        180527  182014 _______   181271
11. PERSONAL PROPERTY ADDRESS CHANGES UPDT          500     500 _______      500
12. PERSONAL PROPERTY ABATEMENTS                  31095   27715 _______    29405
DOG LICENSES:
13. NUMBER OF DOG LICENSES SOLD                    5000    1000 _______     3000

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

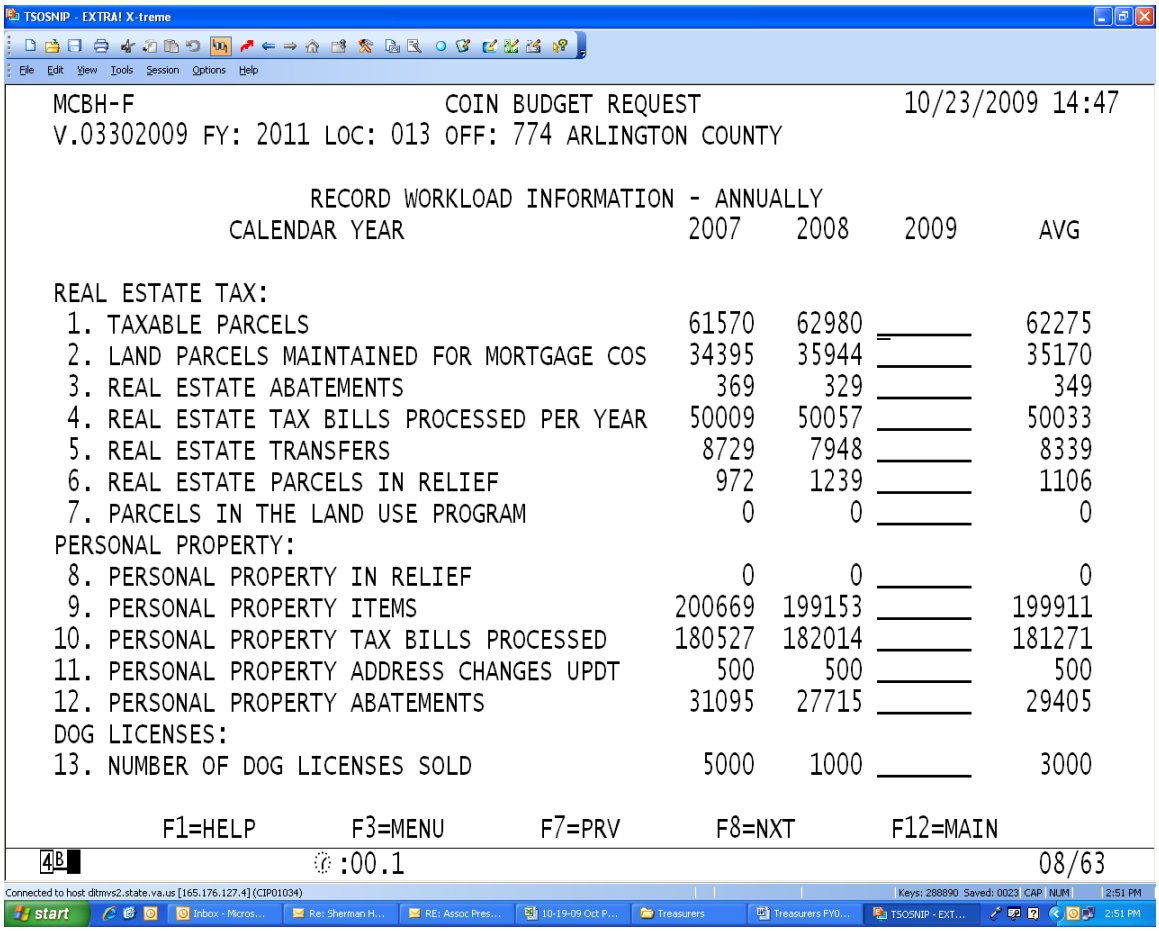
Real Estate:

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. **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.**
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 RELEIF 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



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MCBH-F                        COIN BUDGET REQUEST                10/23/2009 14:47
V.03302009 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007    2008    2009      AVG

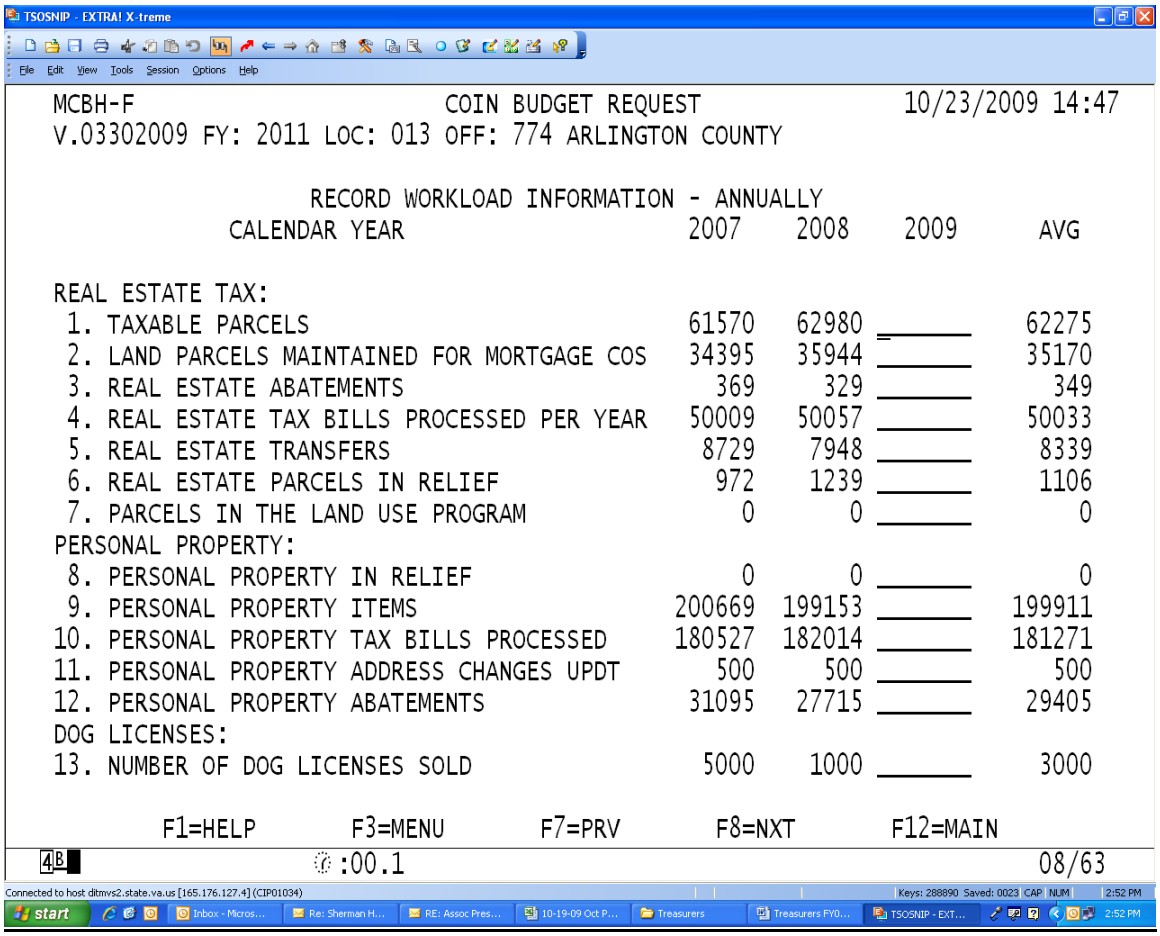
REAL ESTATE TAX:
 1. TAXABLE PARCELS                                61570   62980 _______    62275
 2. LAND PARCELS MAINTAINED FOR MORTGAGE COS       34395   35944 _______    35170
 3. REAL ESTATE ABATEMENTS                           369     329 _______      349
 4. REAL ESTATE TAX BILLS PROCESSED PER YEAR       50009   50057 _______    50033
 5. REAL ESTATE TRANSFERS                           8729    7948 _______     8339
 6. REAL ESTATE PARCELS IN RELIEF                    972    1239 _______     1106
 7. PARCELS IN THE LAND USE PROGRAM                    0       0 _______        0
PERSONAL PROPERTY:
 8. PERSONAL PROPERTY IN RELIEF                        0       0 _______        0
 9. PERSONAL PROPERTY ITEMS                       200669  199153 _______   199911
10. PERSONAL PROPERTY TAX BILLS PROCESSED         180527  182014 _______   181271
11. PERSONAL PROPERTY ADDRESS CHANGES UPDT           500     500 _______      500
12. PERSONAL PROPERTY ABATEMENTS                   31095   27715 _______    29405
DOG LICENSES:
13. NUMBER OF DOG LICENSES SOLD                     5000    1000 _______     3000

        F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
48                        :00.1                                          08/63
```

7. ***<u>NUMBER OF PARCELS IN THE LAND USE PROGRAM</u>***: 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. ***<u>NUMBER OF PERSONAL PROPERTY ITEMS IN RELIEF TO THE ELDERLLY/DIABLED PROGRAM</u>***: 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. ***<u>NUMBER OF ITEMS ON WHICH PERSONAL PROPERTY TAX IS ASSESSED EACH YEAR</u>***: 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'.



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MCBH-F                        COIN BUDGET REQUEST                10/23/2009 14:47
V.03302009 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

REAL ESTATE TAX:
 1. TAXABLE PARCELS                              61570   62980 _______    62275
 2. LAND PARCELS MAINTAINED FOR MORTGAGE COS     34395   35944 _______    35170
 3. REAL ESTATE ABATEMENTS                         369     329 _______      349
 4. REAL ESTATE TAX BILLS PROCESSED PER YEAR     50009   50057 _______    50033
 5. REAL ESTATE TRANSFERS                         8729    7948 _______     8339
 6. REAL ESTATE PARCELS IN RELIEF                  972    1239 _______     1106
 7. PARCELS IN THE LAND USE PROGRAM                  0       0 _______        0
PERSONAL PROPERTY:
 8. PERSONAL PROPERTY IN RELIEF                      0       0 _______        0
 9. PERSONAL PROPERTY ITEMS                     200669  199153 _______   199911
10. PERSONAL PROPERTY TAX BILLS PROCESSED       180527  182014 _______   181271
11. PERSONAL PROPERTY ADDRESS CHANGES UPDT         500     500 _______      500
12. PERSONAL PROPERTY ABATEMENTS                 31095   27715 _______    29405
DOG LICENSES:
13. NUMBER OF DOG LICENSES SOLD                   5000    1000 _______     3000

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

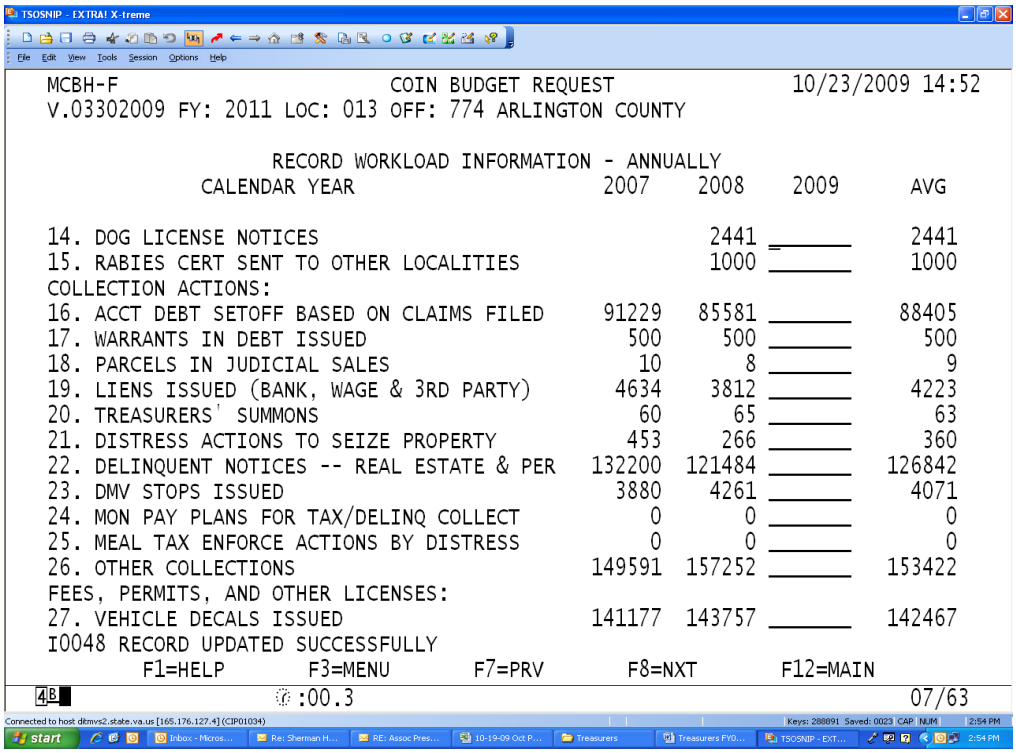
10. ***NUMBER OF PERSONAL PROPERTY TAX BILLS PROCESSED PER YEAR***: If your office handles the collection of personal property, enter the total number of personal property tax bills mailed by your office. INCLUDE the regular book, semi-annual billing, supplements, and bills resulting from proration. 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.

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 6



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MCBH-F                        COIN BUDGET REQUEST                10/23/2009 14:52
V.03302009 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

14. DOG LICENSE NOTICES                                2441 _______      2441
15. RABIES CERT SENT TO OTHER LOCALITIES               1000 _______      1000
COLLECTION ACTIONS:
16. ACCT DEBT SETOFF BASED ON CLAIMS FILED     91229   85581 _______     88405
17. WARRANTS IN DEBT ISSUED                      500     500 _______       500
18. PARCELS IN JUDICIAL SALES                     10       8 _______         9
19. LIENS ISSUED (BANK, WAGE & 3RD PARTY)       4634    3812 _______      4223
20. TREASURERS' SUMMONS                           60      65 _______        63
21. DISTRESS ACTIONS TO SEIZE PROPERTY           453     266 _______       360
22. DELINQUENT NOTICES -- REAL ESTATE & PER   132200  121484 _______    126842
23. DMV STOPS ISSUED                            3880    4261 _______      4071
24. MON PAY PLANS FOR TAX/DELINQ COLLECT           0       0 _______         0
25. MEAL TAX ENFORCE ACTIONS BY DISTRESS           0       0 _______         0
26. OTHER COLLECTIONS                         149591  157252 _______    153422
FEES, PERMITS, AND OTHER LICENSES:
27. VEHICLE DECALS ISSUED                     141177  143757 _______    142467
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP       F3=MENU       F7=PRV       F8=NXT       F12=MAIN
4B                    :00.3                                            07/63
```

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

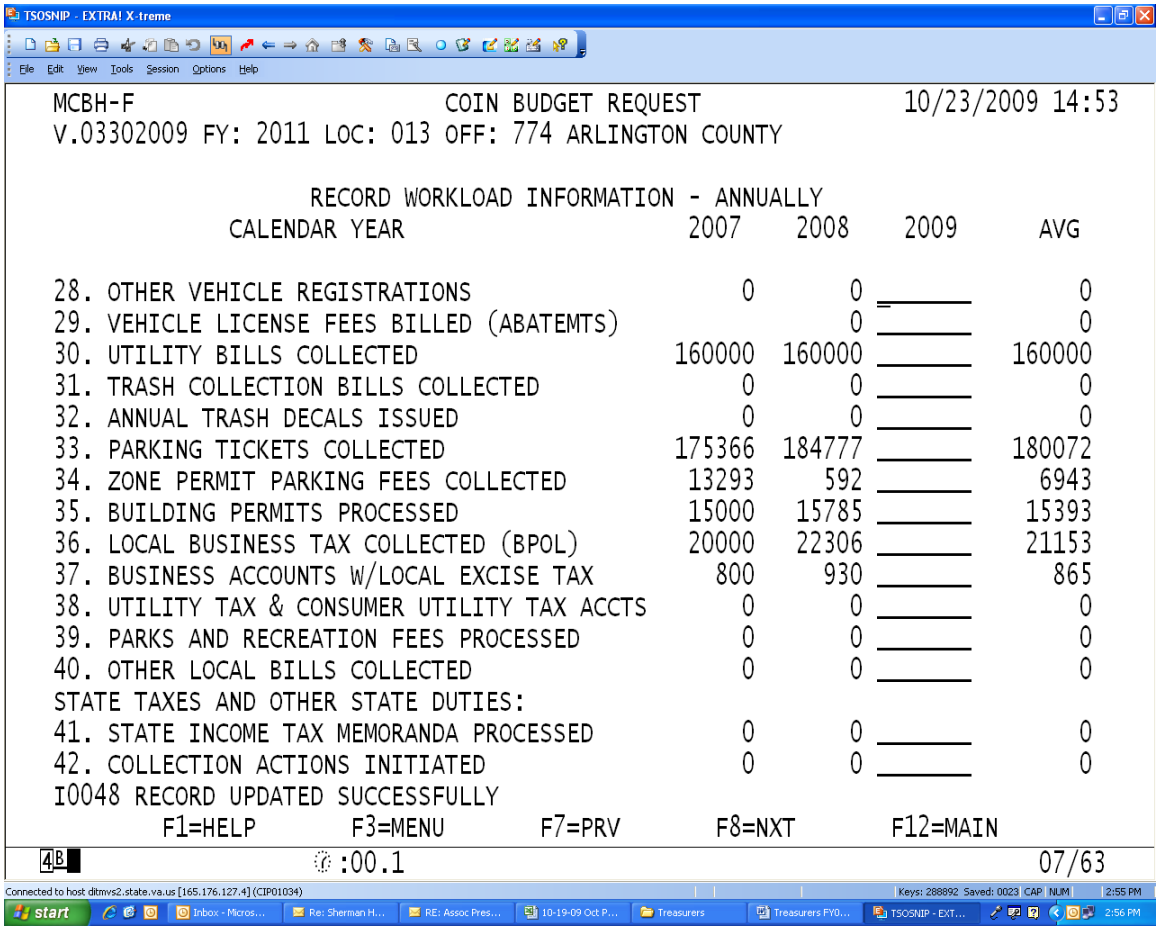
Collection Actions:

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 TAKEN BY DISTRESS***
26. ***NUMBER OF OTHER COLLECTIONS***
27. ***NUMBER OF VEHICLE DECALS ISSUED***: Enter total number of decals issued during the year. INCLUDE transfers and decals issued without charge.

Option #7 Record Workload Information

Option #3 Annual Screens

Screen 4 of 6



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MCBH-F                        COIN BUDGET REQUEST                10/23/2009 14:53
V.03302009 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

28. OTHER VEHICLE REGISTRATIONS                     0       0 _______        0
29. VEHICLE LICENSE FEES BILLED (ABATEMTS)                  0 _______        0
30. UTILITY BILLS COLLECTED                    160000  160000 _______   160000
31. TRASH COLLECTION BILLS COLLECTED                0       0 _______        0
32. ANNUAL TRASH DECALS ISSUED                      0       0 _______        0
33. PARKING TICKETS COLLECTED                  175366  184777 _______   180072
34. ZONE PERMIT PARKING FEES COLLECTED          13293     592 _______     6943
35. BUILDING PERMITS PROCESSED                  15000   15785 _______    15393
36. LOCAL BUSINESS TAX COLLECTED (BPOL)         20000   22306 _______    21153
37. BUSINESS ACCOUNTS W/LOCAL EXCISE TAX          800     930 _______      865
38. UTILITY TAX & CONSUMER UTILITY TAX ACCTS        0       0 _______        0
39. PARKS AND RECREATION FEES PROCESSED             0       0 _______        0
40. OTHER LOCAL BILLS COLLECTED                     0       0 _______        0
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
```

Fees, Permits & Other Licenses

28. ***<u>NUMBER OF OTHER VEHICLES</u>***: Enter total number of scooter or moped registrations issued during the year.

29. ***<u>NUMBER OF VEHICLE LICENSE FEES BILLED (INCLUDE ABATEMENTS)</u>***: Enter total number of vehicles that were assessed during the year. INCLUDE license fees that were abated.

30. ***<u>NUMBER OF UTILITY BILLS COLLECTED</u>***: Enter total number of water, sewer, and other municipal utility bills collected during the year.

31. ***<u>NUMBER OF TRASH COLLECTION BILLS COLLECTED</u>***: Enter total number of trash collection bills processed during the year.

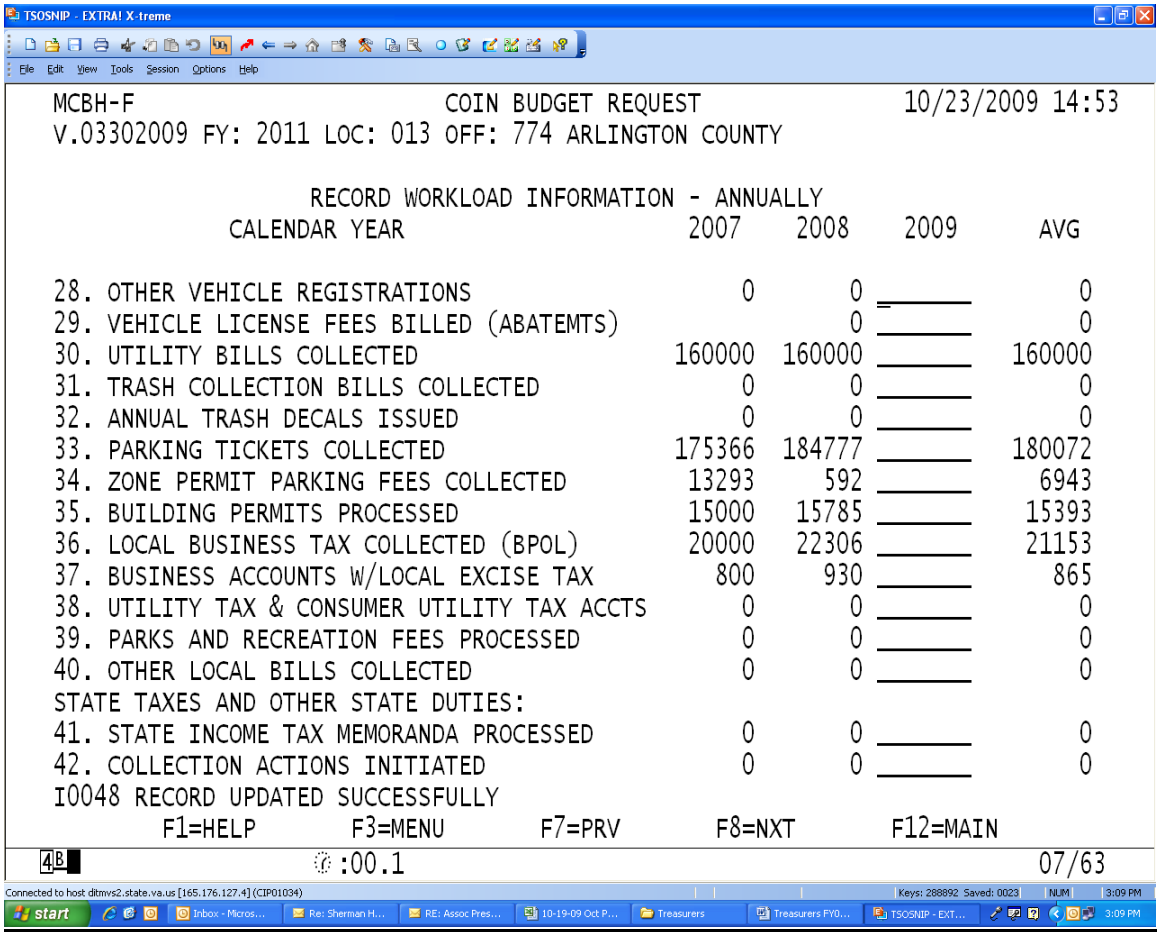
32. ***<u>NUMBER OF ANNUAL TRASH DECALS ISSUED</u>***: Enter total number of trash decals or stickers issued during the year.

33. ***<u>NUMBER OF PARKING TICKETS COLLECTED</u>***: Enter total number of parking tickets collected during the year.

34. ***<u>NUMBER OF ZONE PERMIT PARKING FEES COLLECTED</u>***: Enter total number of zone permit parking fees collected during the year.

35. ***<u>NUMBER OF BUILDING PERMITS PROCESSED</u>***: Enter total number of permits collected during the year.

36. ***<u>NUMBER OF LOCAL BUSINESSES ON WHICH LICENSE TAX IS COLLECTED (BPOL)</u>***: Enter the total number of businesses from whom you collect a license tax.



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MCBH-F                          COIN BUDGET REQUEST                 10/23/2009 14:53
V.03302009 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007    2008    2009      AVG

28. OTHER VEHICLE REGISTRATIONS                       0       0 _______        0
29. VEHICLE LICENSE FEES BILLED (ABATEMTS)                    0 _______        0
30. UTILITY BILLS COLLECTED                      160000  160000 _______   160000
31. TRASH COLLECTION BILLS COLLECTED                  0       0 _______        0
32. ANNUAL TRASH DECALS ISSUED                        0       0 _______        0
33. PARKING TICKETS COLLECTED                    175366  184777 _______   180072
34. ZONE PERMIT PARKING FEES COLLECTED            13293     592 _______     6943
35. BUILDING PERMITS PROCESSED                    15000   15785 _______    15393
36. LOCAL BUSINESS TAX COLLECTED (BPOL)           20000   22306 _______    21153
37. BUSINESS ACCOUNTS W/LOCAL EXCISE TAX            800     930 _______      865
38. UTILITY TAX & CONSUMER UTILITY TAX ACCTS          0       0 _______        0
39. PARKS AND RECREATION FEES PROCESSED               0       0 _______        0
40. OTHER LOCAL BILLS COLLECTED                       0       0 _______        0
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
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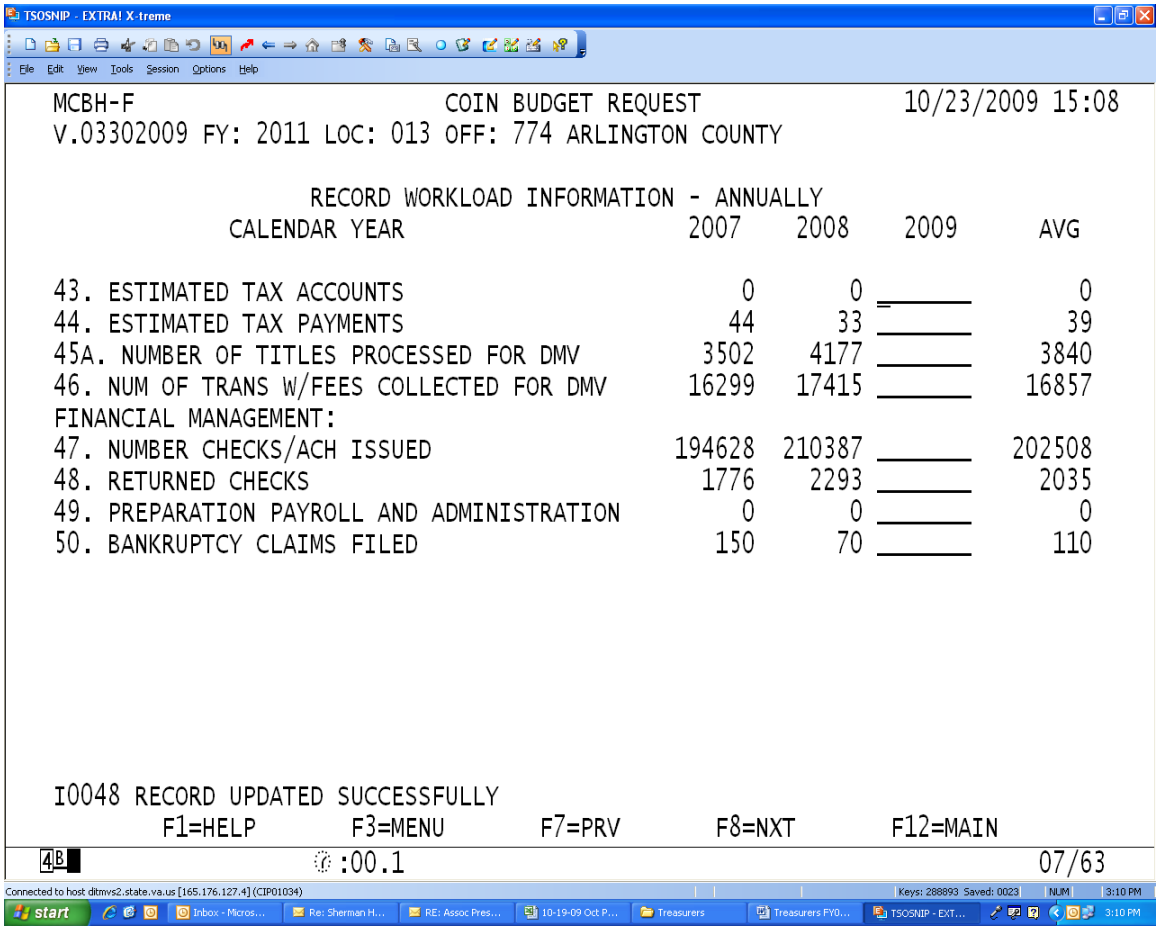
37. ***NUMBER OF BUSINESS ACCOUNTS ON WHICH LOCAL EXCISE TAX IS COLLECTED***: Enter the total number of meals tax, admissions, cigarette, lodging and other local excise tax accounts from whom you collect a excise tax.
38. ***NUMBER OF UTILITY TAX AND CONSUMER UTILITY TAX ACCOUNTS***: Enter the total 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 6



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MCBH-F                        COIN BUDGET REQUEST                10/23/2009 15:08
V.03302009 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

43. ESTIMATED TAX ACCOUNTS                          0       0 _______        0
44. ESTIMATED TAX PAYMENTS                         44      33 _______       39
45A. NUMBER OF TITLES PROCESSED FOR DMV          3502    4177 _______     3840
46. NUM OF TRANS W/FEES COLLECTED FOR DMV       16299   17415 _______    16857
FINANCIAL MANAGEMENT:
47. NUMBER CHECKS/ACH ISSUED                   194628  210387 _______   202508
48. RETURNED CHECKS                              1776    2293 _______     2035
49. PREPARATION PAYROLL AND ADMINISTRATION          0       0 _______        0
50. BANKRUPTCY CLAIMS FILED                       150      70 _______      110

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***

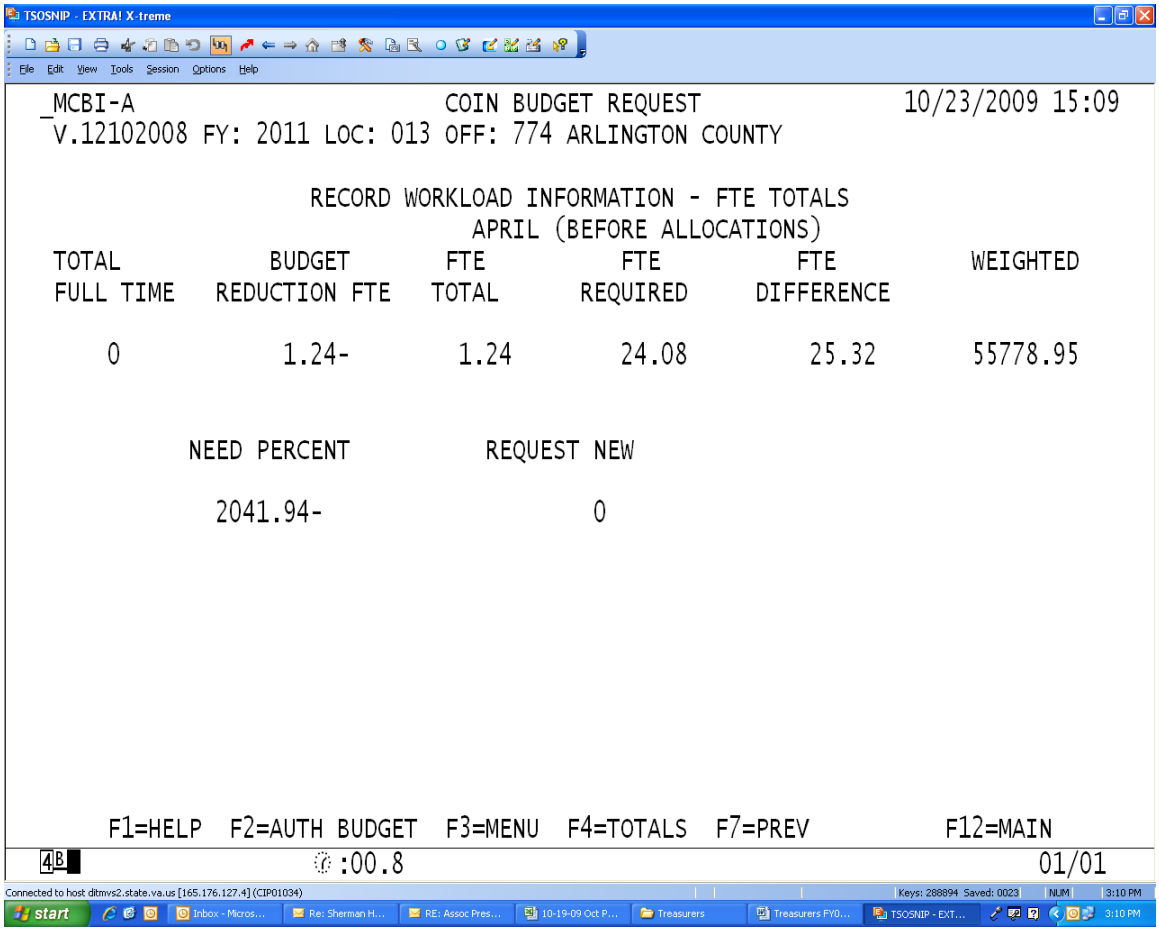
Financial Management:

47. ***NUMBER CHECKS/ACH ISSUED***: Enter the checks/ACH payments issued during the year. INCLUDE the checks issued from all accounts under the Treasurer's supervision and ACH items listed on bank statements.
48. ***RETURNED CHECKS***: Enter the total number of checks/ACH payments 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

Screen 6 of 6



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_MCBI-A                          COIN BUDGET REQUEST                10/23/2009 15:09
V.12102008 FY: 2011 LOC: 013 OFF: 774 ARLINGTON COUNTY

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

    0           1.24-        1.24        24.08        25.32        55778.95


          NEED PERCENT          REQUEST NEW

            2041.94-                  0




     F1=HELP   F2=AUTH BUDGET   F3=MENU   F4=TOTALS   F7=PREV          F12=MAIN
4B                    :00.8                                                 01/01
```

This screen shows the following information based on the data entered as part of the budget request process:

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

The percentage of need is based on the formula below

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

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~~ **(include abatements)**	0.04
28	Number of other vehicle registrations	0.06
29	~~Number of dog licenses sold~~ **Number of vehicle license fees billed**	~~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

Option #7 Record Workload Information

Beginning February 1 offices can begin recording workload data monthly, quarterly or annually for CY 2017

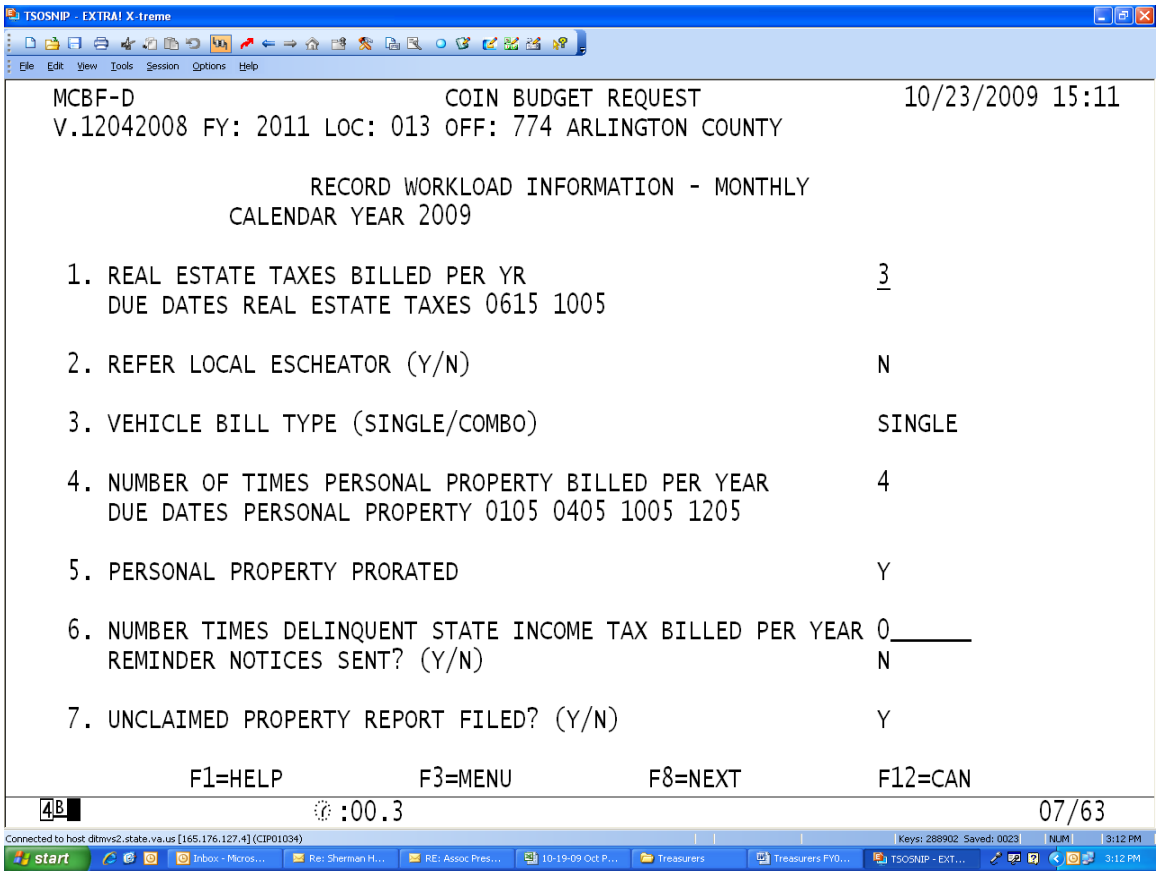
This can be done by selecting options 1, 2, or 3 from the "Record Workload Information" menu

- If you choose option 1 "Monthly" you will need to enter workload data each month but will not have to enter quarterly or annual data
- If you choose option 2 "Quarterly" you will need to enter workload data each quarter but will not have to enter monthly or annual data (quarterly data will first be entered in March)
- If you choose option 3 "Annual" you will only have to enter workload data in January for the previous year

Follow the same steps as those used for the annual data (for FY 2018) to input CY 2016 data

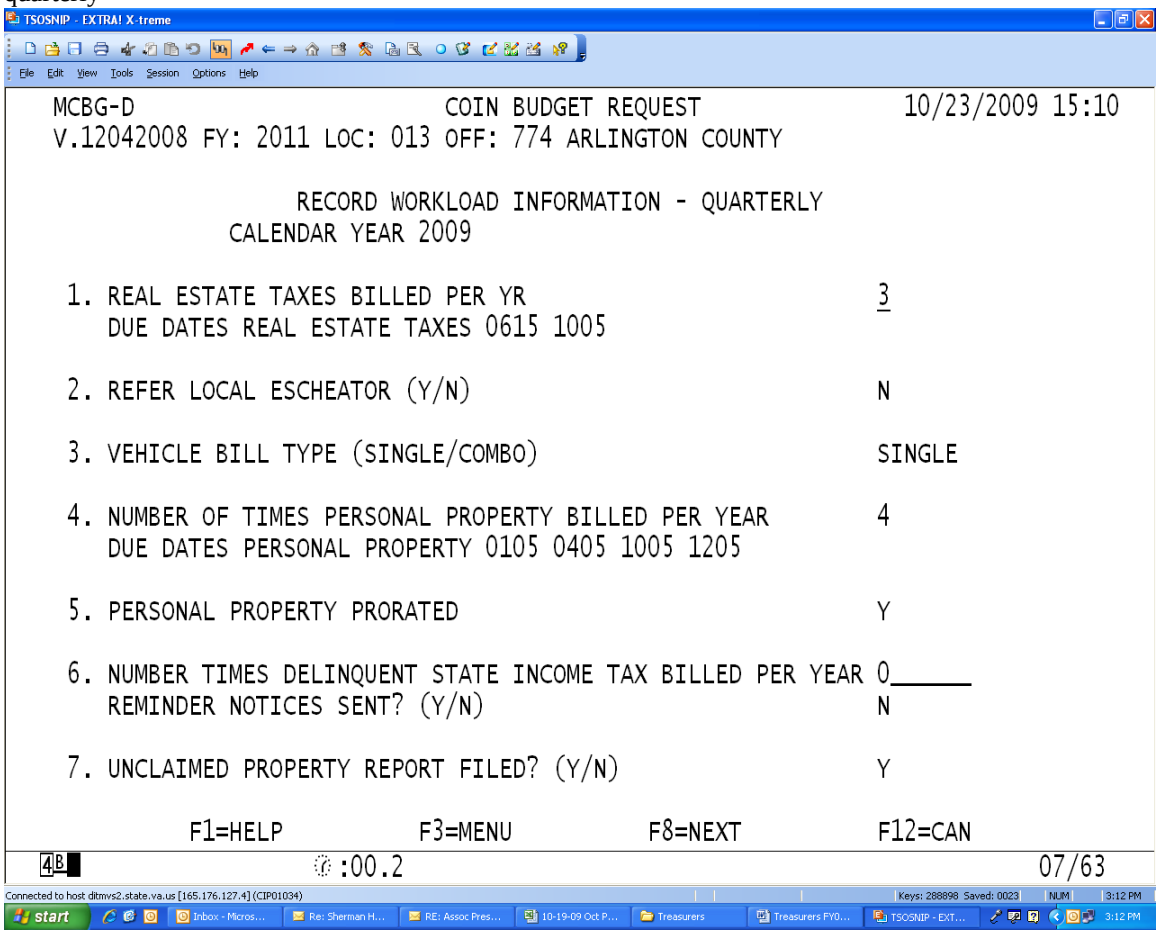
Option # 1 Monthly Screens

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

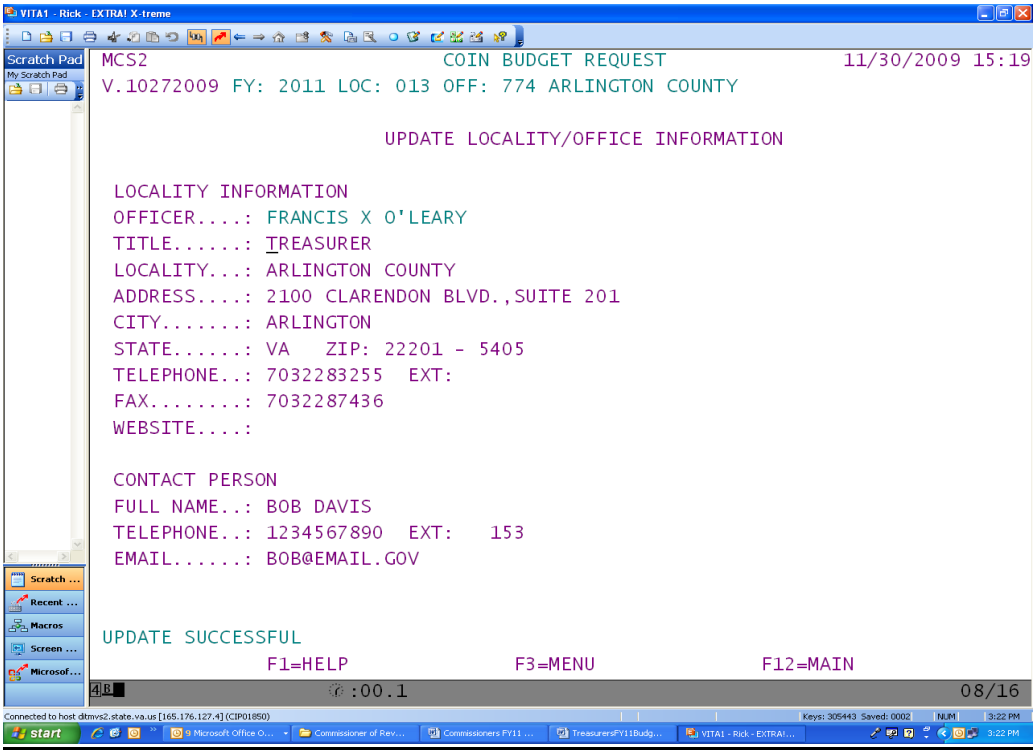
Purpose:

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

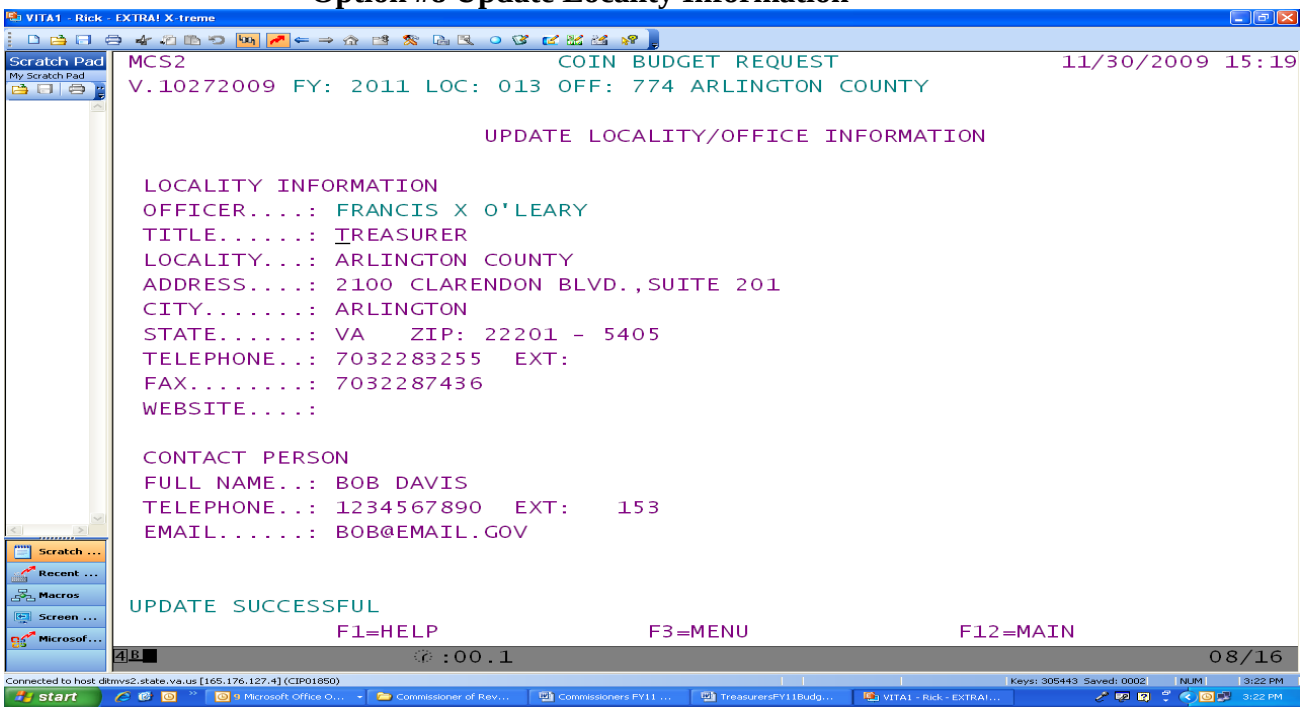
Navigational Path:

- 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



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 **-774** (Treasurer)
    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

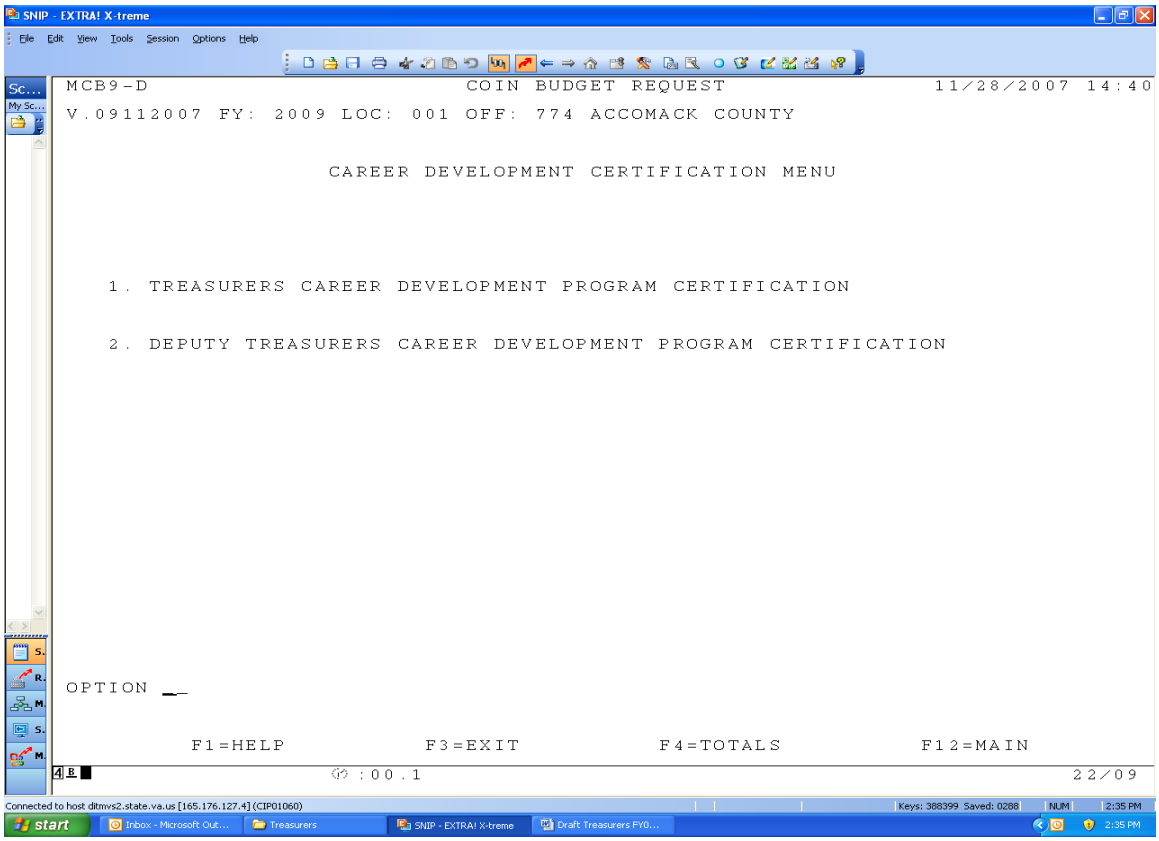
Specified Certification Programs are accessed from the COIN Budget Request Menu. The program will determine based on locality and office which special programs to display.

- **Treasurers Career Development Program**
  - **If the Treasurer is not certified** do not enter due dates, percentages, or participating and enrolled employees, but you **must** answer the question "Treasurer 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 Treasurer has already received their CDP increase they **must** re-apply for career development **each year** by completing the Treasurers Career Development Certification in COIN by February 1 to maintain the CDP increase.
  - The Officer must adopt the Deputy Treasurers Career Development Program to be eligible for participation in the officer Career Development Program
  - Do not enter the Officer's name on this screen.
- **Deputy Treasurers Career Development Program**
  - ✓ The blanks on this screen are only for the names of Certified Deputy Treasurers, **not** deputies who are participating and enrolled
  - ✓ Deputies that have already received their CDP increase **must** be entered on this screen **each year** to maintain the salary increase for the Career Development Program.

Navigational Path:

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

Option #9, Special Program Certification



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

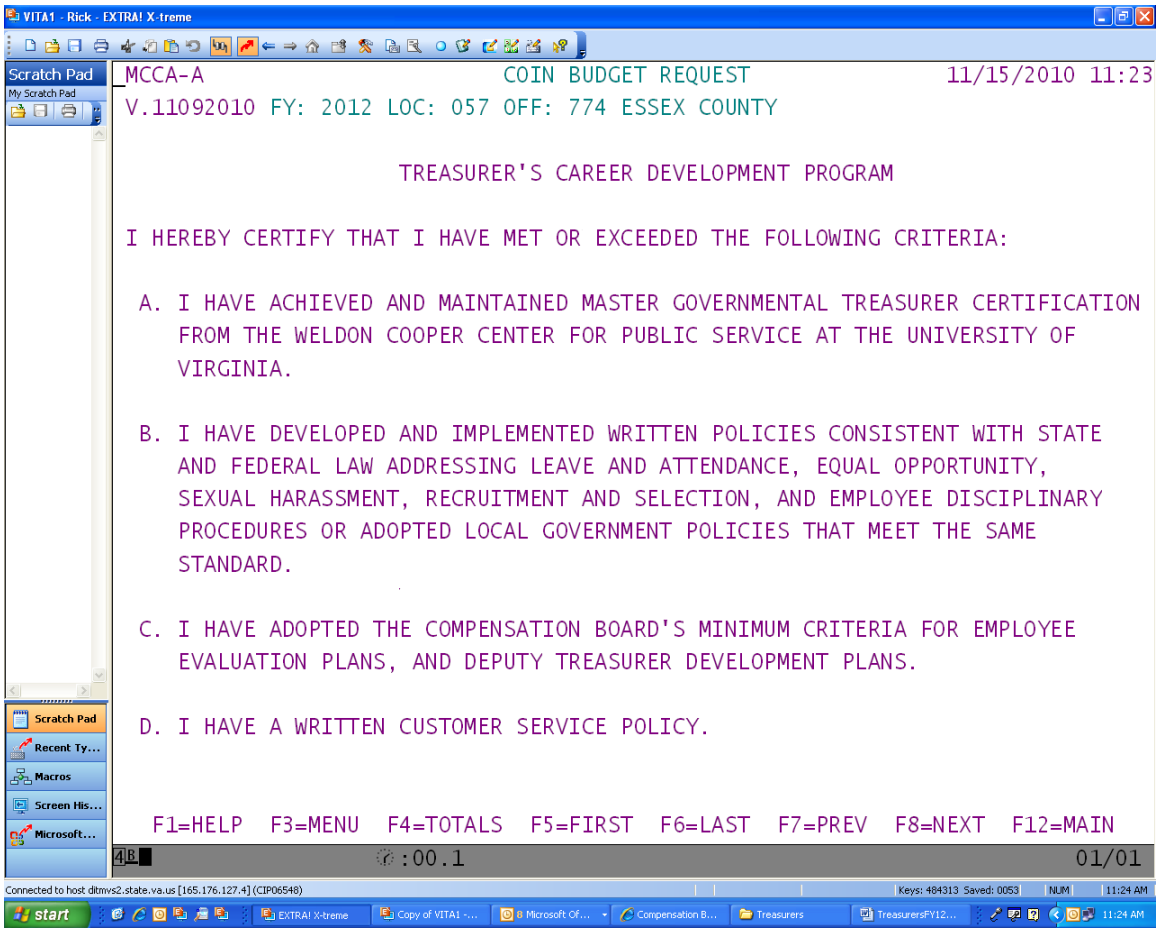
Procedures:

- 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
  - ✓ All Treasurers must access and certify Yes or No to these programs
  - ✓ Enter the information requested if applicable
  - ✓ Certify Yes or No to the question on the last screen
  - ✓ Enter the officer's SCB USERID on the last screen

Option #9, Special Program Certification

Option #1 Treasurers Career Development Program Certification

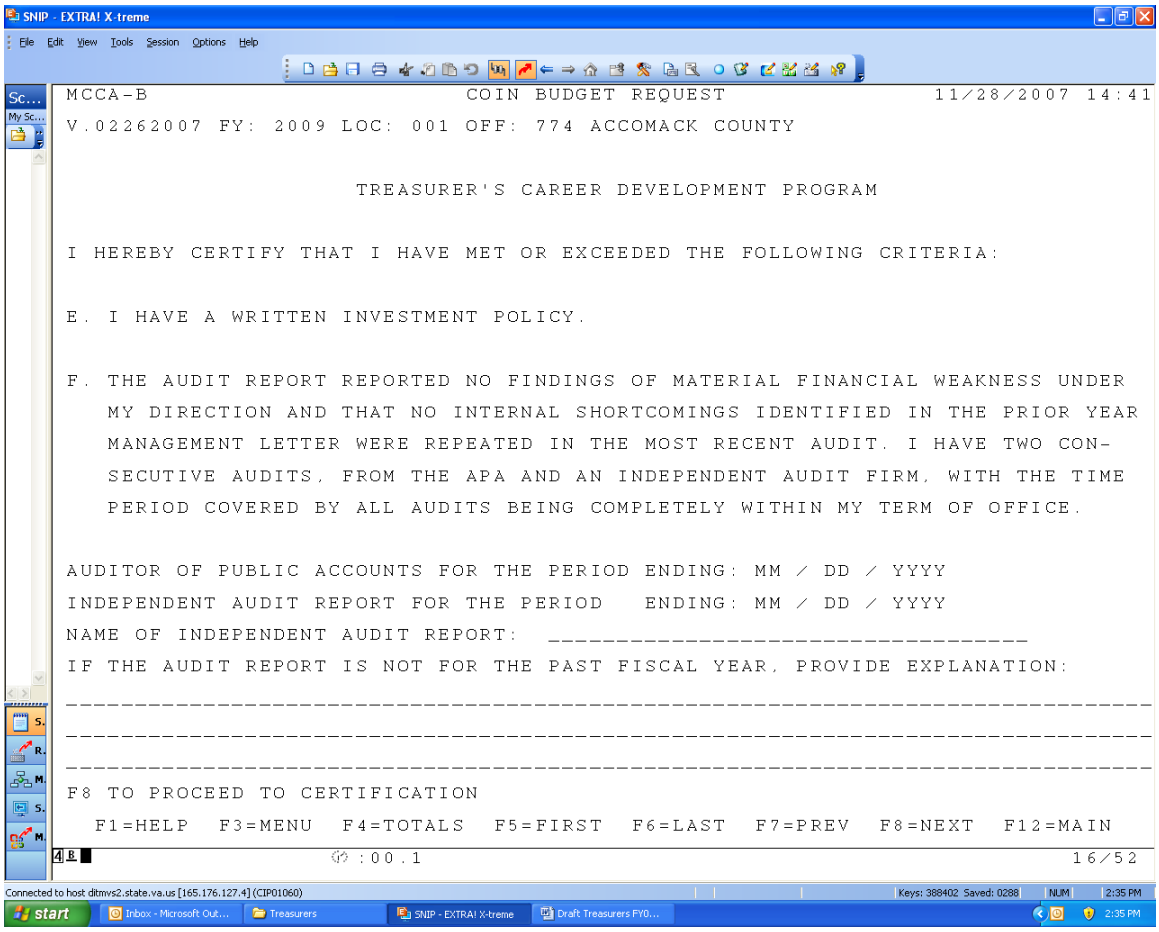
Screen 1 of 5



- Read and then Press 'F8' to proceed to the next page or
- If the officer is not participating in the Career Development Program press 'F6' to proceed to the last page to certify "N" for No to the program and enter the Officer's SCB USERID

Option #9, Special Program Certification

Screen 2 of 5



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MCCA-B                          COIN BUDGET REQUEST                    11/28/2007 14:41
V.02262007 FY: 2009 LOC: 001 OFF: 774 ACCOMACK COUNTY

                      TREASURER'S CAREER DEVELOPMENT PROGRAM

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

E. I HAVE A WRITTEN INVESTMENT POLICY.

F. THE AUDIT REPORT REPORTED NO FINDINGS OF MATERIAL FINANCIAL WEAKNESS UNDER
   MY DIRECTION AND THAT NO INTERNAL SHORTCOMINGS IDENTIFIED IN THE PRIOR YEAR
   MANAGEMENT LETTER WERE REPEATED IN THE MOST RECENT AUDIT. I HAVE TWO CON-
   SECUTIVE AUDITS, FROM THE APA AND AN INDEPENDENT AUDIT FIRM, WITH THE TIME
   PERIOD COVERED BY ALL AUDITS BEING COMPLETELY WITHIN MY TERM OF OFFICE.

AUDITOR OF PUBLIC ACCOUNTS FOR THE PERIOD ENDING: MM / DD / YYYY
INDEPENDENT AUDIT REPORT FOR THE PERIOD   ENDING: MM / DD / YYYY
NAME OF INDEPENDENT AUDIT REPORT:  ___________________________________
IF THE AUDIT REPORT IS NOT FOR THE PAST FISCAL YEAR, PROVIDE EXPLANATION:
_____________________________________________________________________________
_____________________________________________________________________________
_____________________________________________________________________________
F8 TO PROCEED TO CERTIFICATION
  F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NEXT  F12=MAIN
                                  :00.1                                  16/52
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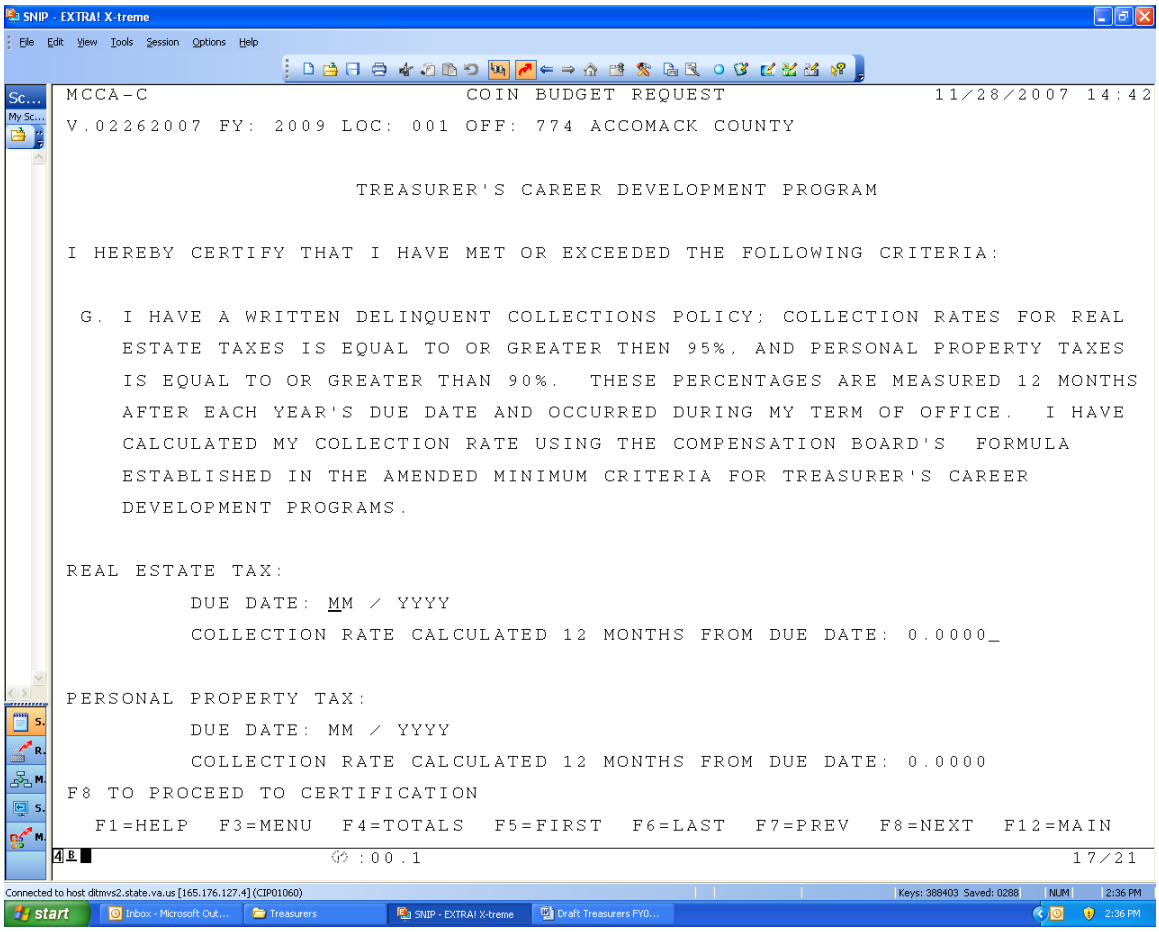
- Enter the period ending date for the audit by public accounts
- Enter the period ending date for the independent audit report
- Enter the Name of the Independent Audit Report
- Enter an explanation if the two audits are from different fiscal years

****Please fill this information in <u>only</u> if the Treasurer is certified****

- Press 'F8' to proceed with certification
- If the Treasurer is not certified press 'F6' to proceed to the last page and certify "N" for No and enter the officer's SCB USERID

Option #9, Special Program Certification

Screen 3 of 5



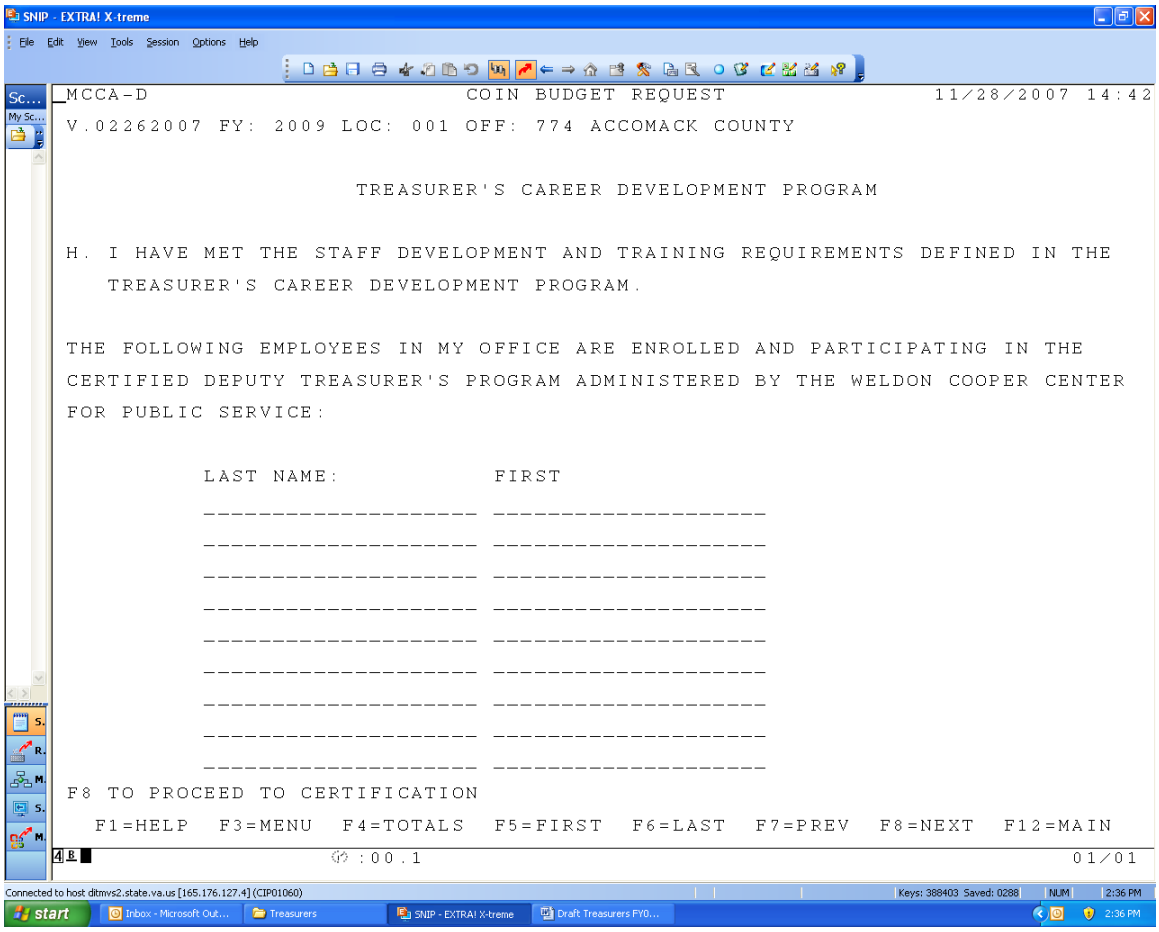
- Enter the due date for Real Estate Tax
- Enter the Collection rate for the Real Estate Tax – expressed as a decimal
- Enter the due date for Personal Property Tax
- Enter the Collection rate for Personal Property Tax – expressed as a decimal

****Please fill this information in only if the Treasurer 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 Treasurers Program **if the officer is certified. If the officer is not certified do not enter any names.**
- Last Name
- First Name

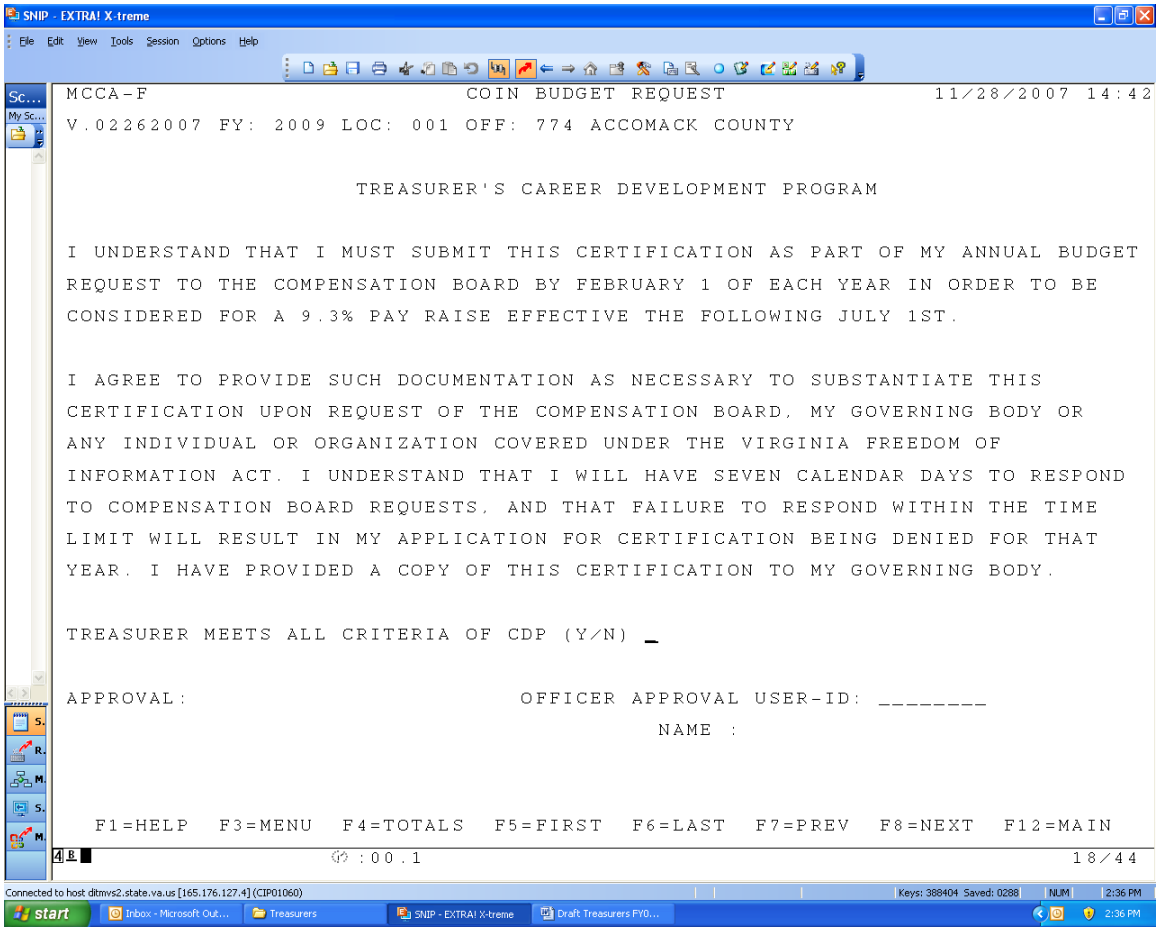
Press 'F8' to proceed to the next page

<u>Helpful Hints</u>

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

Option #9, Special Program Certification

Screen 5 of 5



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MCCA-F                          COIN BUDGET REQUEST                 11/28/2007 14:42
V.02262007 FY: 2009 LOC: 001 OFF: 774 ACCOMACK 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
4                        :00.1                                                18/44
```

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

<u>Helpful Hints</u>

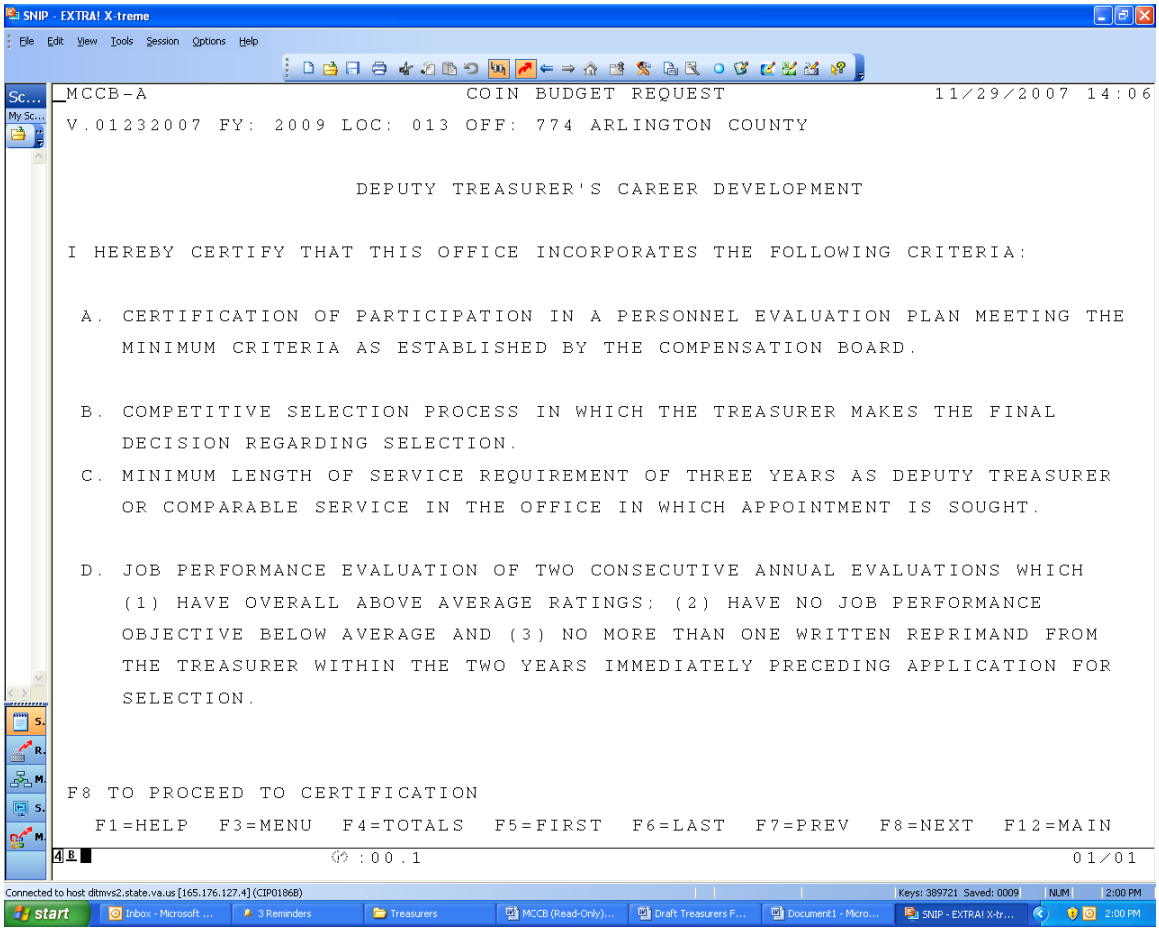
- <u>If the Treasurer is **not certified** you **must** answer "N' to the question "Treasurer meets all criteria of CDP".</u>

Option #9, Special Program Certification

Option #2 Deputy Treasurers Career Development Program Certification

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

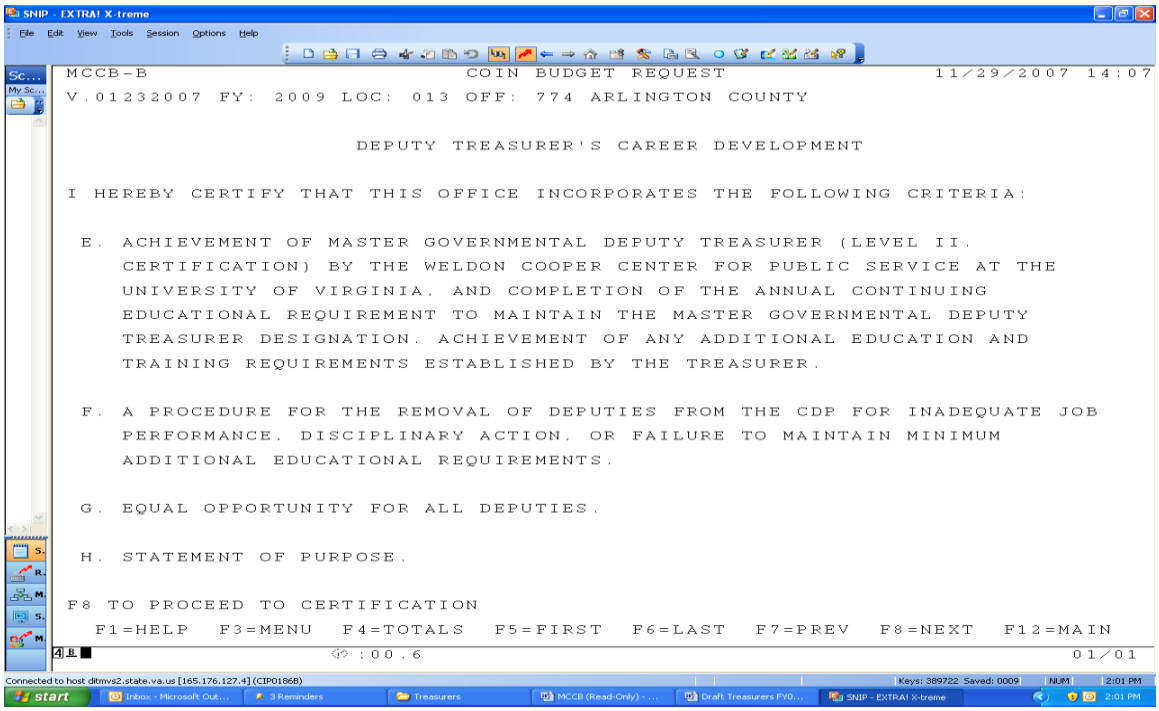
Screen 1 of 5



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

Option #9, Special Program Certification

Screen 2 of 5



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MCCB-B                          COIN BUDGET REQUEST                    11/29/2007 14:07
V.01232007 FY: 2009 LOC: 013 OFF: 774 ARLINGTON 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.

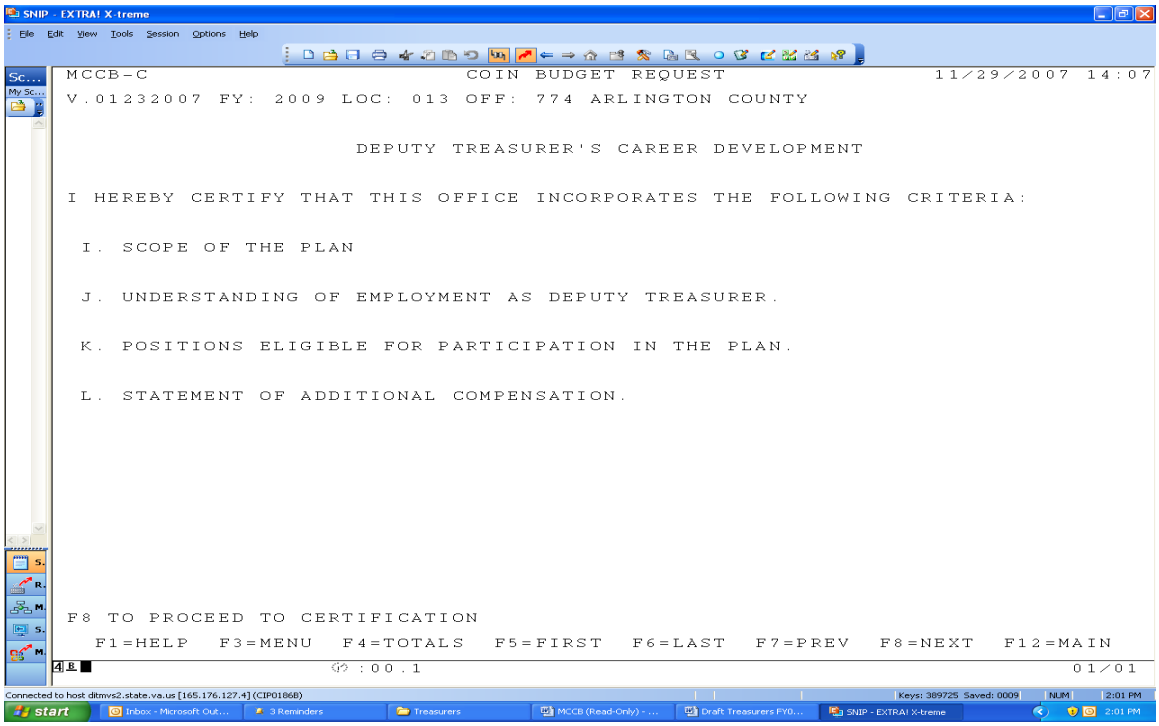
 G. EQUAL OPPORTUNITY FOR ALL DEPUTIES.

 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
                                  :00.6                                      01/01
```

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

Screen 3 of 5



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MCCB-C                          COIN BUDGET REQUEST                    11/29/2007 14:07
V.01232007 FY: 2009 LOC: 013 OFF: 774 ARLINGTON 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.

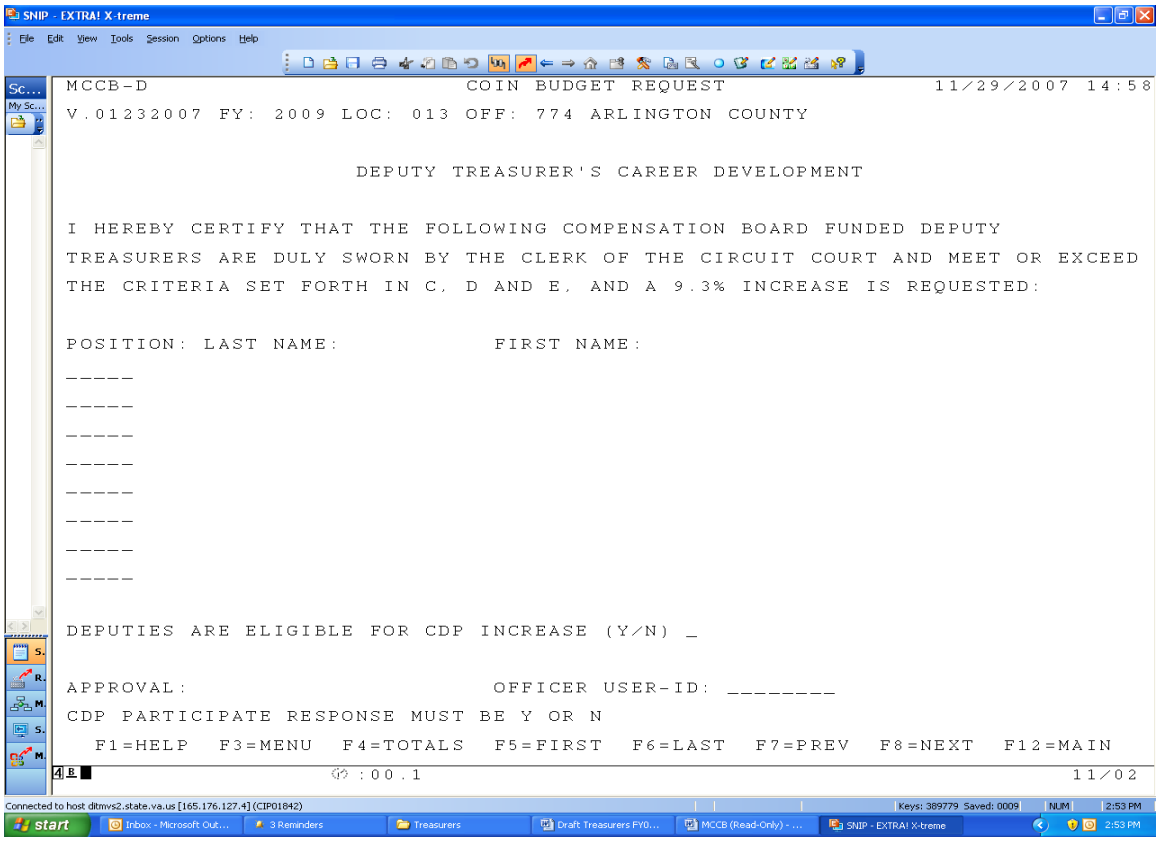
 L. STATEMENT OF ADDITIONAL COMPENSATION.

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
```

Read and then press 'F8' to proceed with certification

Option #9, Special Program Certification

Screen 4 of 5



Enter the Position Number, for each employee who is a sworn Deputy Treasurer 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

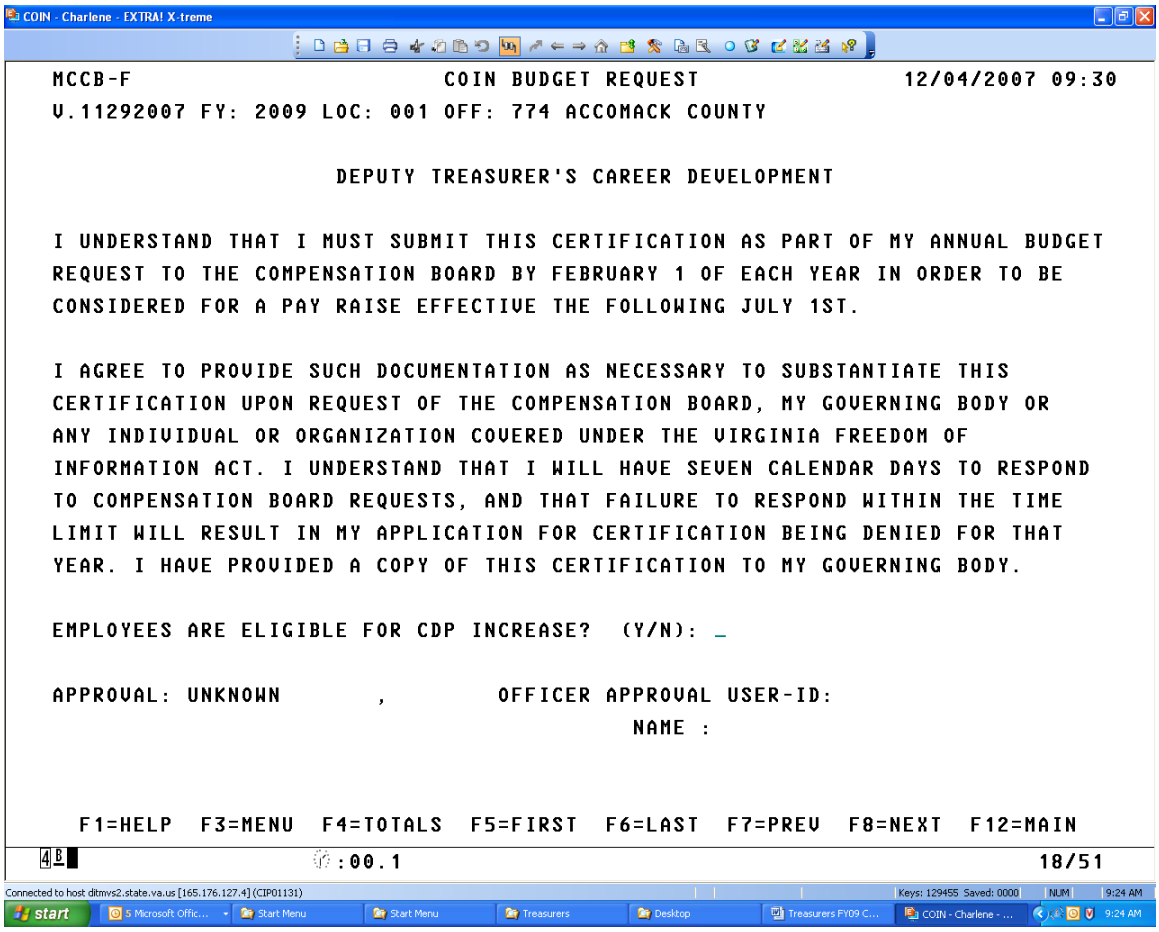
- Enter the Position Number
- Press the "Enter" key
- The name of the employee in the position will appear
- Enter 'Y' or 'N' for "Deputy is eligible for the CDP increase"
- Enter the Officer's SCB USERID to certify

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.

Option #9, Special Program Certification

Screen 5 of 5



Procedure

- Enter 'Y' or 'N' for "Deputy is eligible for the CDP increase"
- Enter the Officer's SCB USERID to certify

12. Option #10 - Certify Budget Request

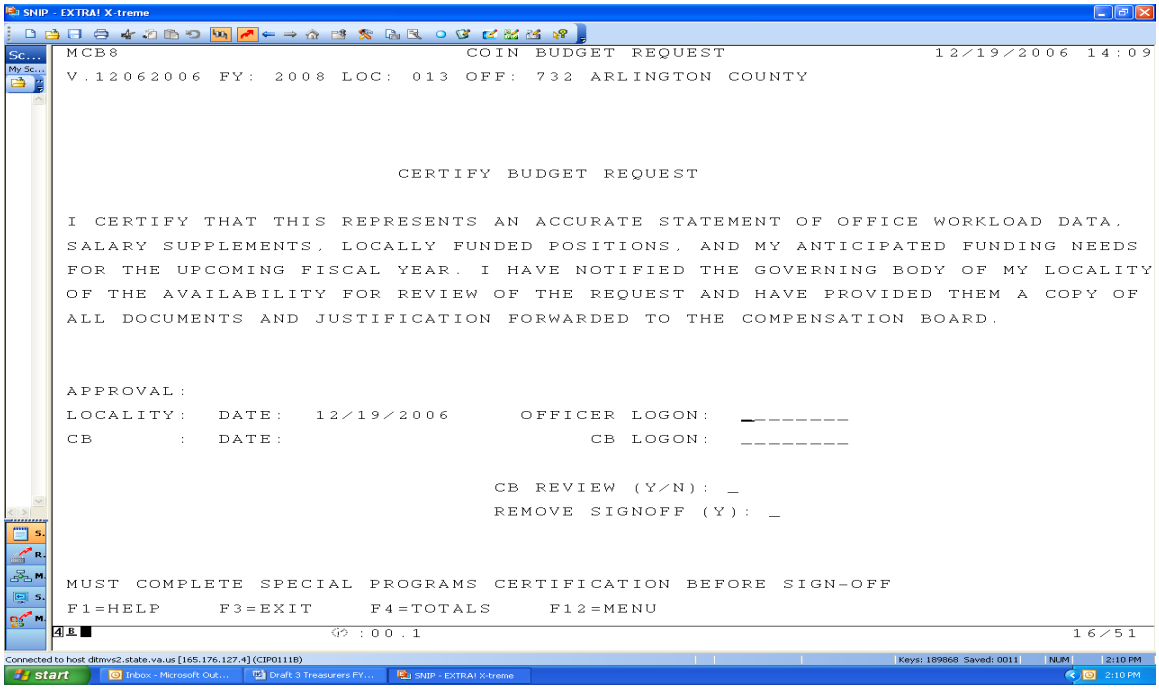
Purpose:

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

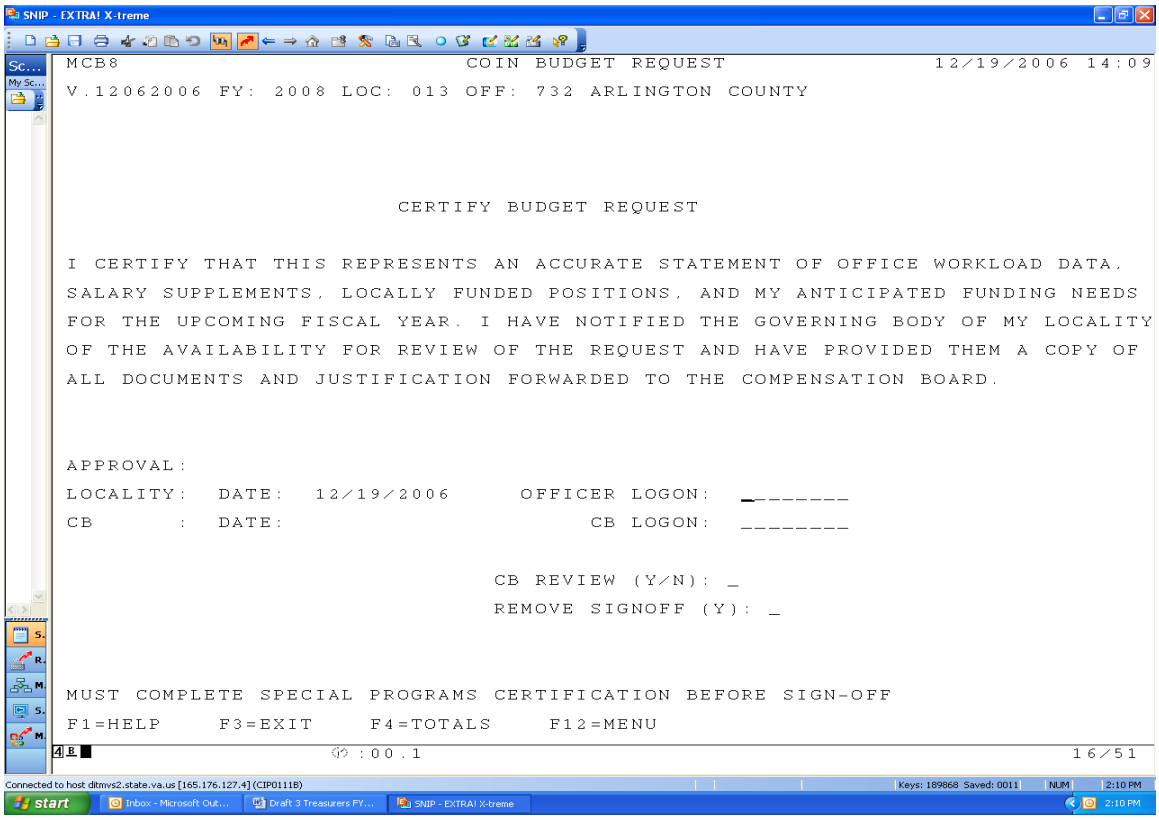
TREASURERS



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

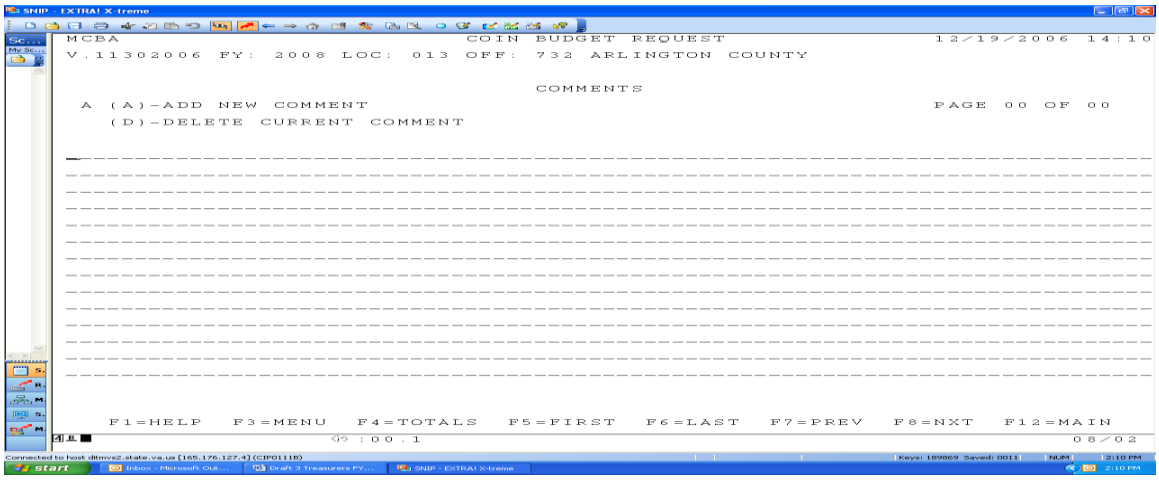
PURPOSE:

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

TREASURERS



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

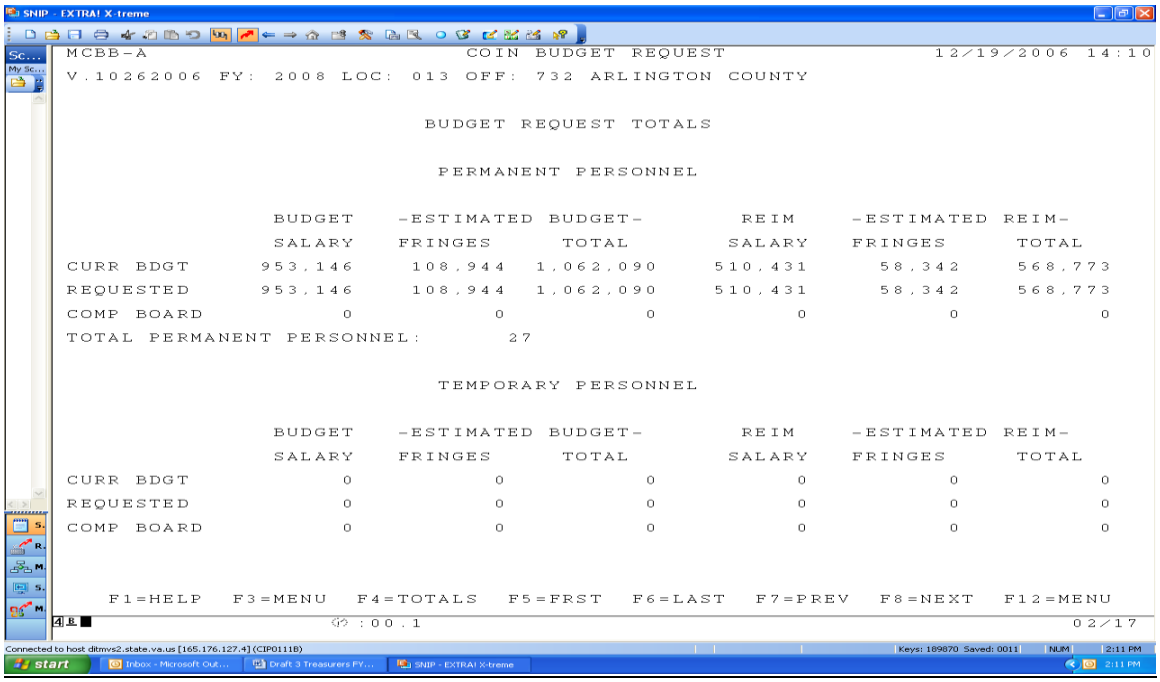
14. Function Key 'F4' - Budget Request Totals

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 14:10
V.10262006 FY: 2008 LOC: 013 OFF: 732 ARLINGTON COUNTY

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT      953,146     108,944   1,062,090     510,431     58,342     568,773
REQUESTED      953,146     108,944   1,062,090     510,431     58,342     568,773
COMP BOARD           0           0           0           0          0           0
TOTAL PERMANENT PERSONNEL:       27

                               TEMPORARY PERSONNEL

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

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

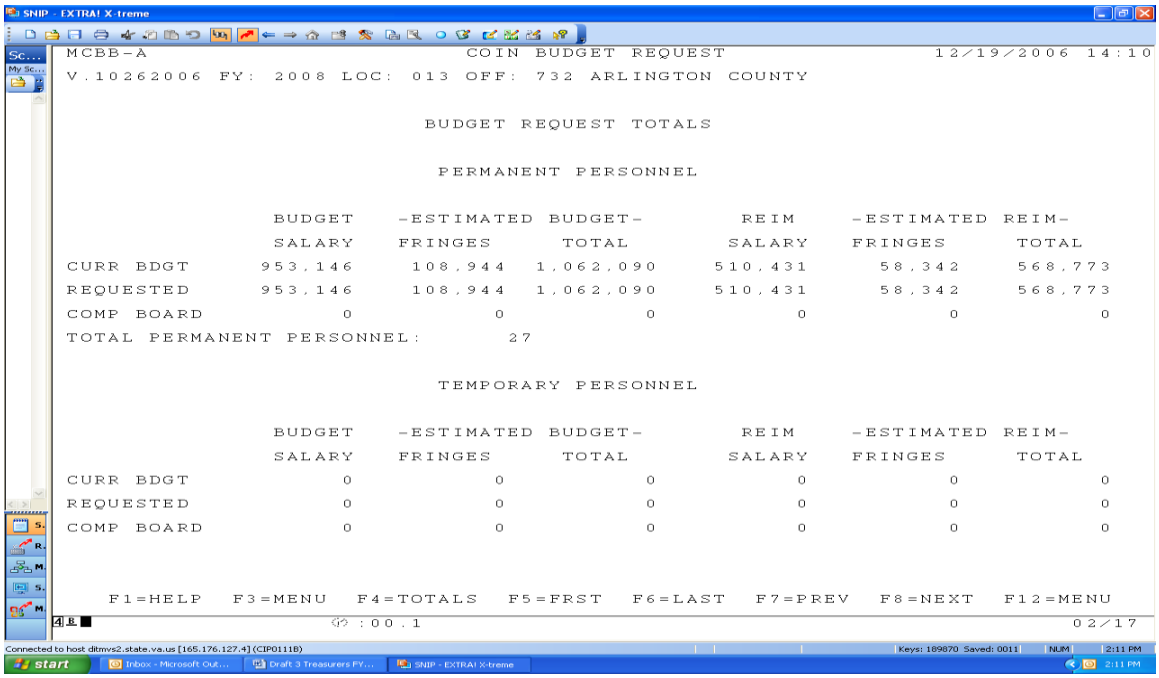
HELPFUL HINTS:

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

'F4' Budget Request Totals

TREASURERS

1ST SCREEN OF 3:



```
MCBB-A                          COIN BUDGET REQUEST                    12/19/2006 14:10
V.10262006 FY: 2008 LOC: 013 OFF: 732 ARLINGTON COUNTY

                          BUDGET REQUEST TOTALS

                           PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT      953,146     108,944   1,062,090     510,431     58,342     568,773
REQUESTED      953,146     108,944   1,062,090     510,431     58,342     568,773
COMP BOARD           0           0           0           0          0           0
TOTAL PERMANENT PERSONNEL:       27

                           TEMPORARY PERSONNEL

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

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

PROCEDURES:

- **1ST SCREEN OF 3:**

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

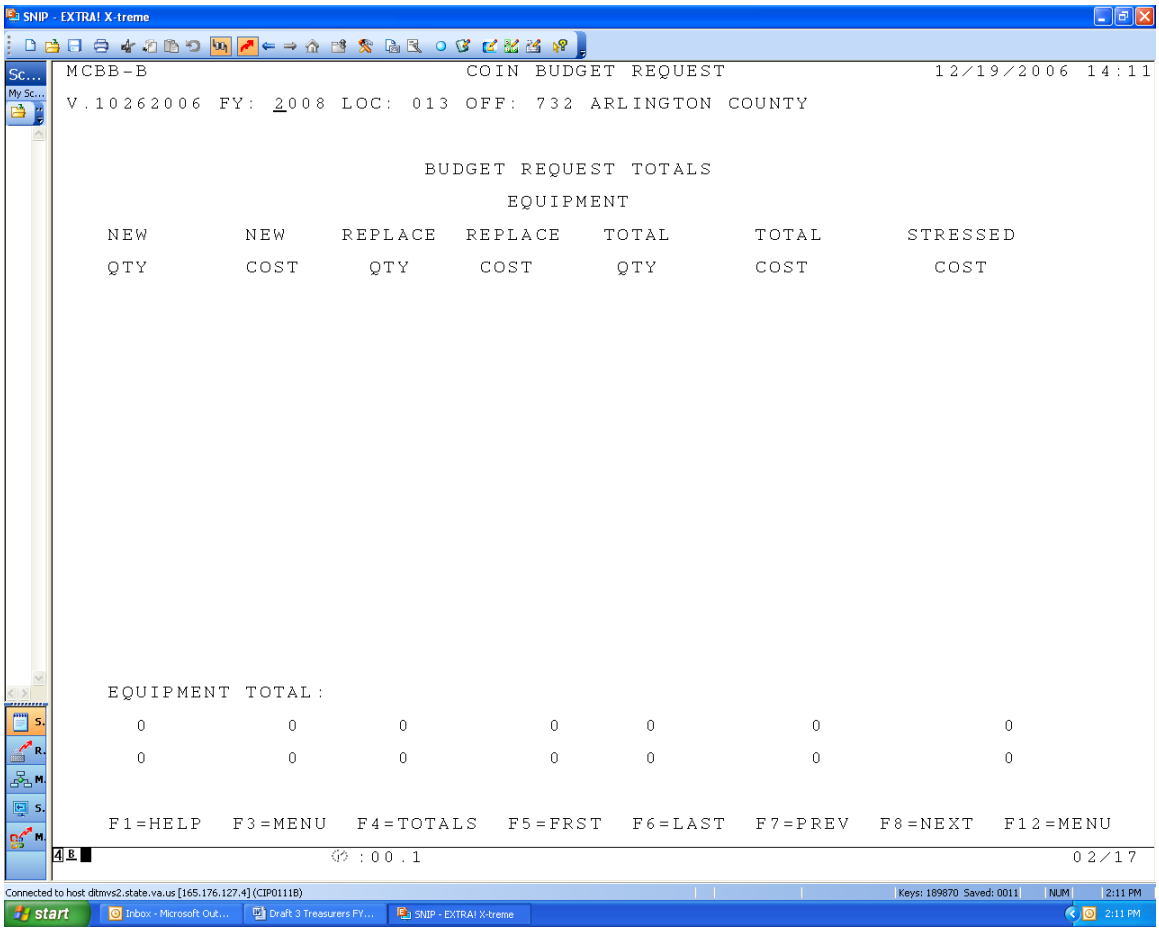
  - ✓ **'FRINGE'** benefits listed are estimates only

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

'F4' Budget Request Totals

TREASURERS

2ND SCREEN OF 3:

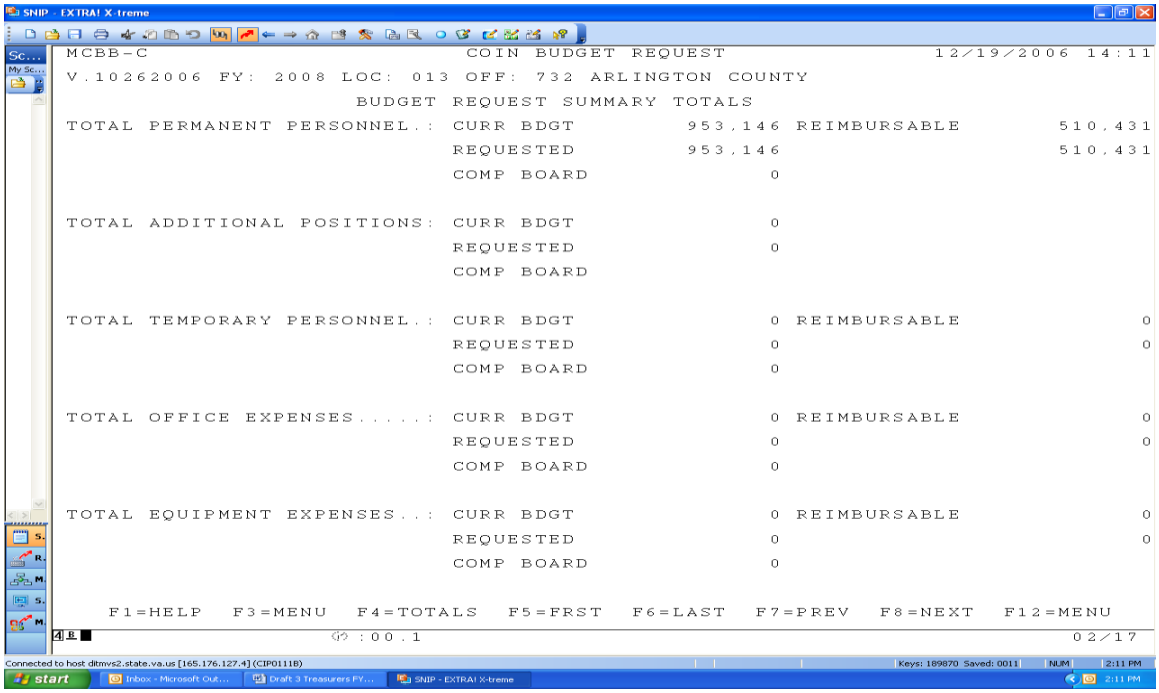


- **2ND SCREEN OF 3:**
  - ✓ This screen displays equipment totals by equipment category
  - ✓ **FIRST LINE** of information displayed relates to the request you have made or are in the process of making
    - This information is subject to change as you make revisions to your budget request
    - Line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

TREASURERS

3RD SCREEN OF 3:



```
MCBB-C                          COIN BUDGET REQUEST                    12/19/2006  14:11
V.10262006  FY:  2008  LOC:  013  OFF:  732  ARLINGTON COUNTY
                          BUDGET REQUEST SUMMARY TOTALS
TOTAL PERMANENT PERSONNEL.: CURR BDGT          953,146 REIMBURSABLE          510,431
                            REQUESTED          953,146                       510,431
                            COMP BOARD               0

TOTAL ADDITIONAL POSITIONS: CURR BDGT                0
                            REQUESTED                0
                            COMP BOARD

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

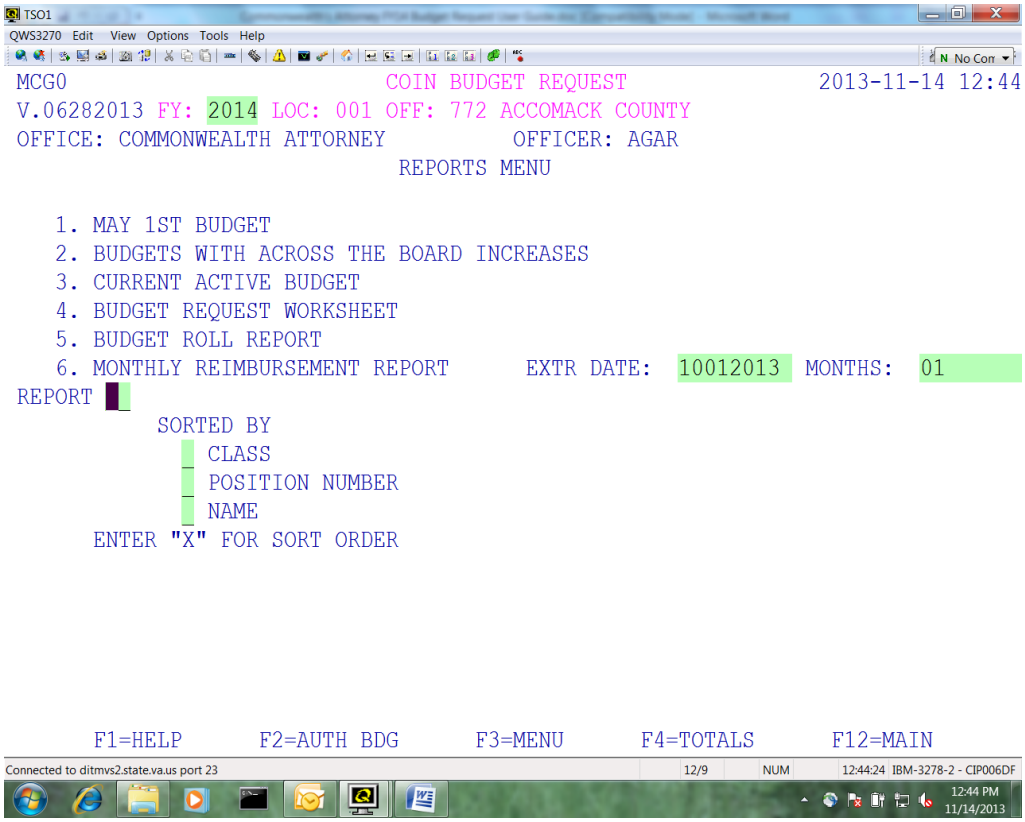
TOTAL OFFICE EXPENSES.....: CURR BDGT                0 REIMBURSABLE                0
                            REQUESTED                0                             0
                            COMP BOARD               0

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

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

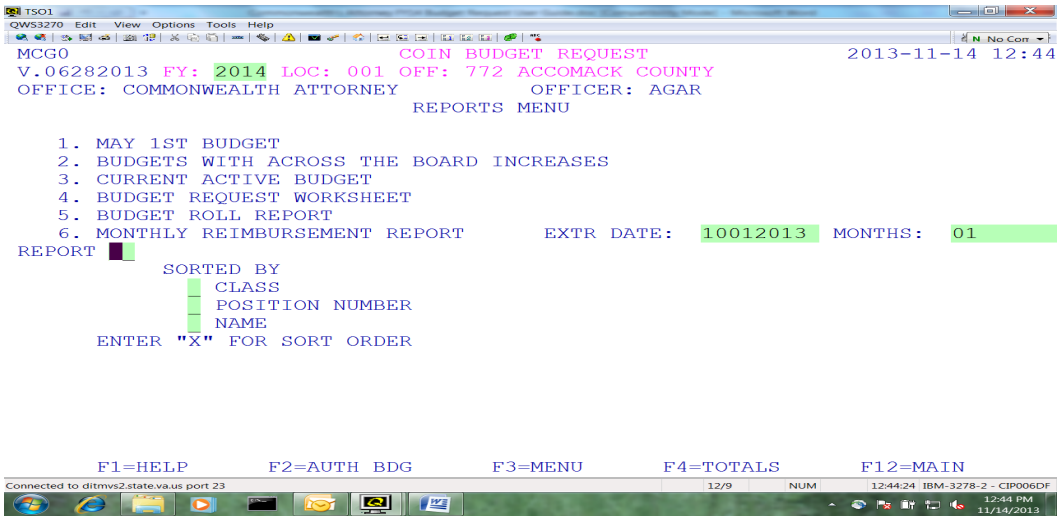
- **3RD SCREEN OF 3:**
  - ✓ Displays totals for each budget request broad-based category:
    - Permanent Personnel
    - Additional Positions
    - Temporary Personnel Funding
    - Office Expense Funding
    - Equipment Requests
  - ✓ **'CURR BDGT'** – This line of information refers to the 'base' 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



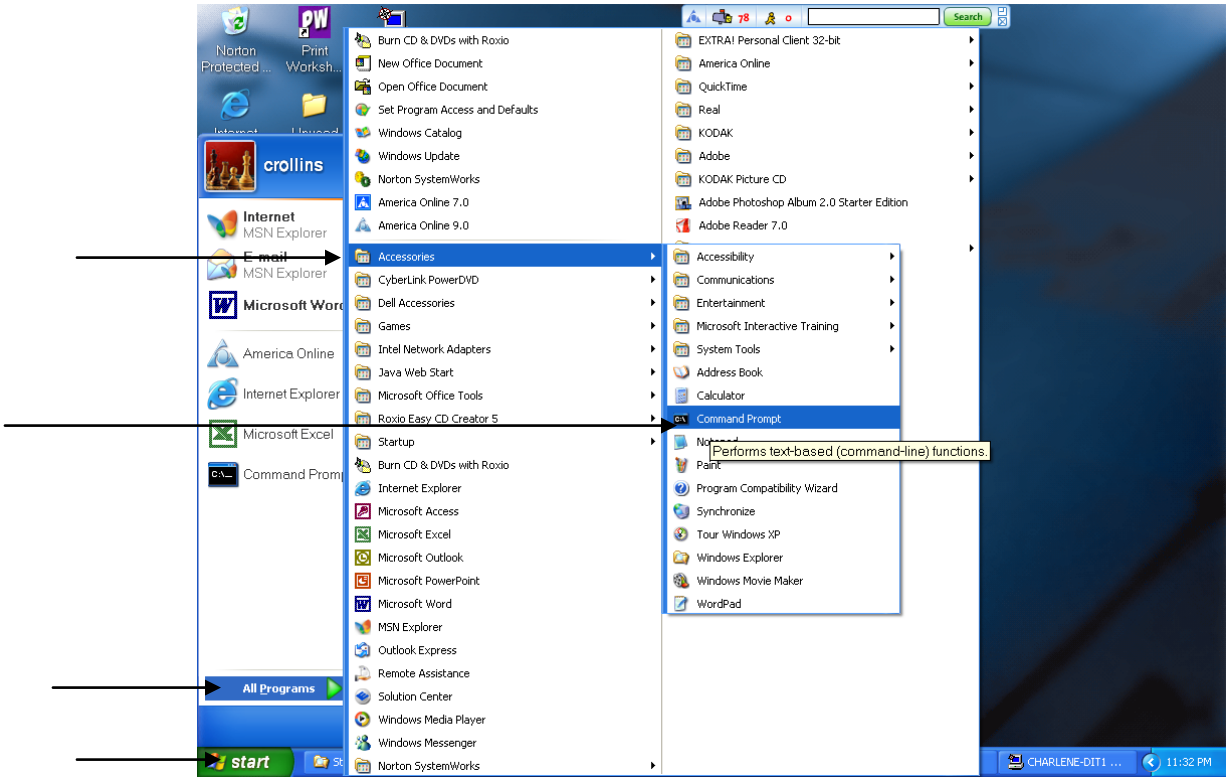
There are 6 versions of the Budget Report that are available.

- 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

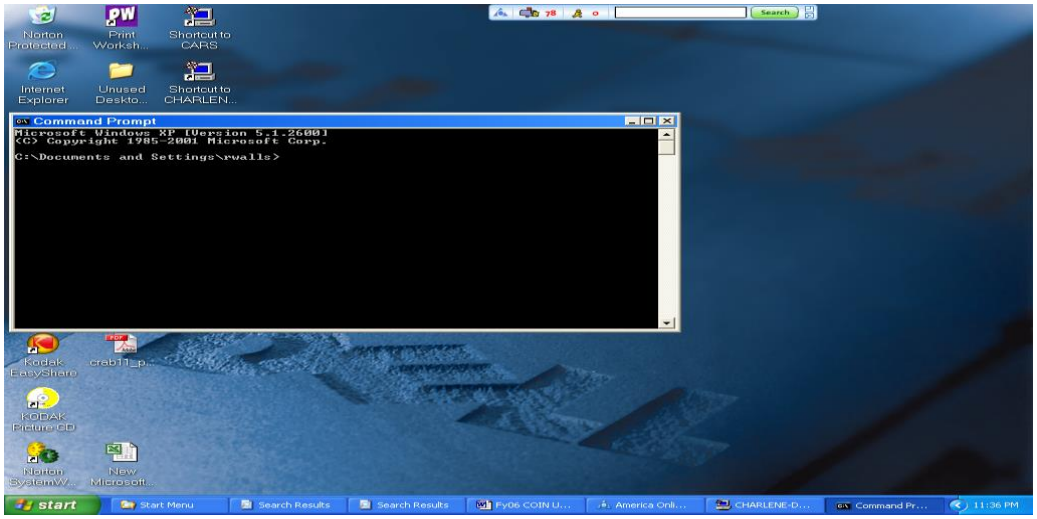
16. Download Instructions



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

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17. Appendix

Classifications And Pay Plans

TREASURERS

CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE TREASURER
July 1, 2016 - JUNE 30, 2017

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
GENERAL OFFICE CLERK CLERK TYPIST II	GC, MGC CT, MCT	1	Administrative	20,861	39,262
FISCAL ASSISTANT DEPUTY I SECRETARY I	FA, MFA DI, MDI SECI, MSECI				
DEPUTY II SECRETARY II	DII, MDII SECII, MSECII	2	Sr. Administrative	24,924	47,977
DEPUTY III ADMINISTRATIVE ASSISTANT	DIII, MDIII AA, MAA	4	Professional	29,797	61,273
DEPUTY IV	DIV, MDIV				
CHIEF DEPUTY I	CDI, MCDI	7	Sr. Professional	35,600	80,026
CHIEF DEPUTY II	CDII, MCDII				
CHIEF DEPUTY III	CDIII, MCD3	8	Supervisory/ Management	46,288	122,232
CHIEF DEPUTY IV	CDIV, MCDIV				

M - denotes participation in Deputy Treasurers Career Development Program

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