Constitutional Officer Information Network

C•IN

Budget Request Guide

Commissioners of the Revenue

Compensation Board
December 1, 2019

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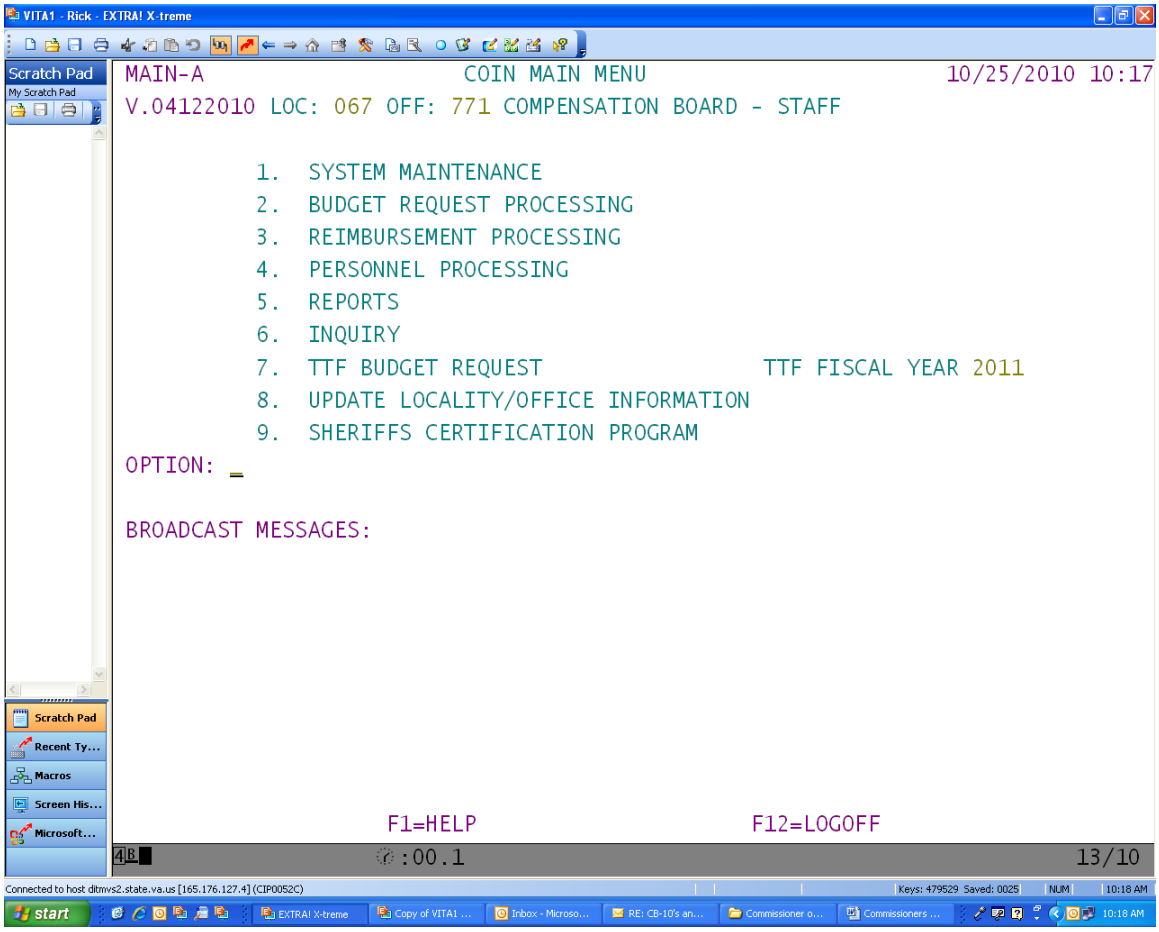
1. COIN MAIN MENU



- **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

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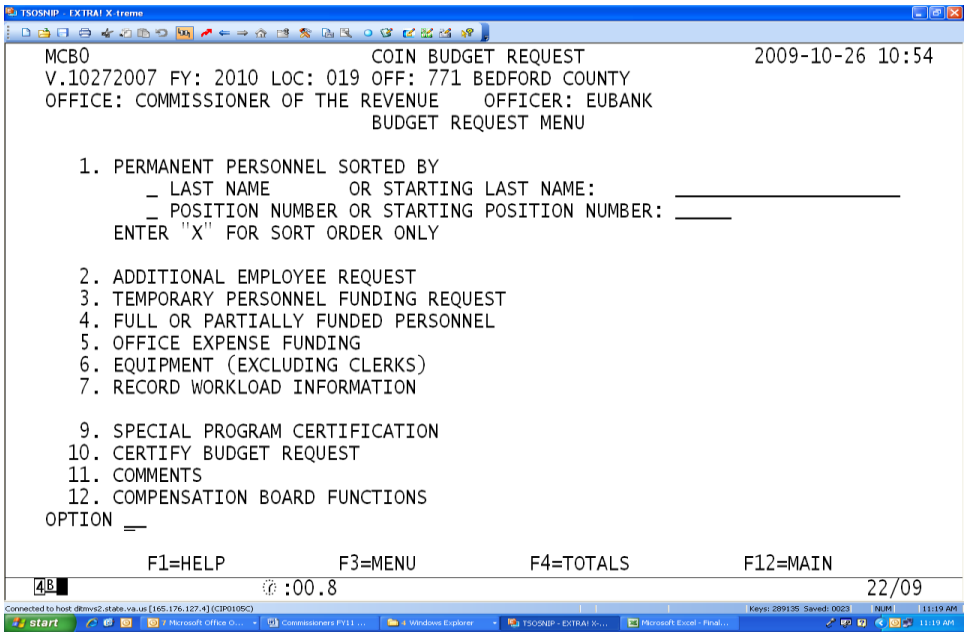
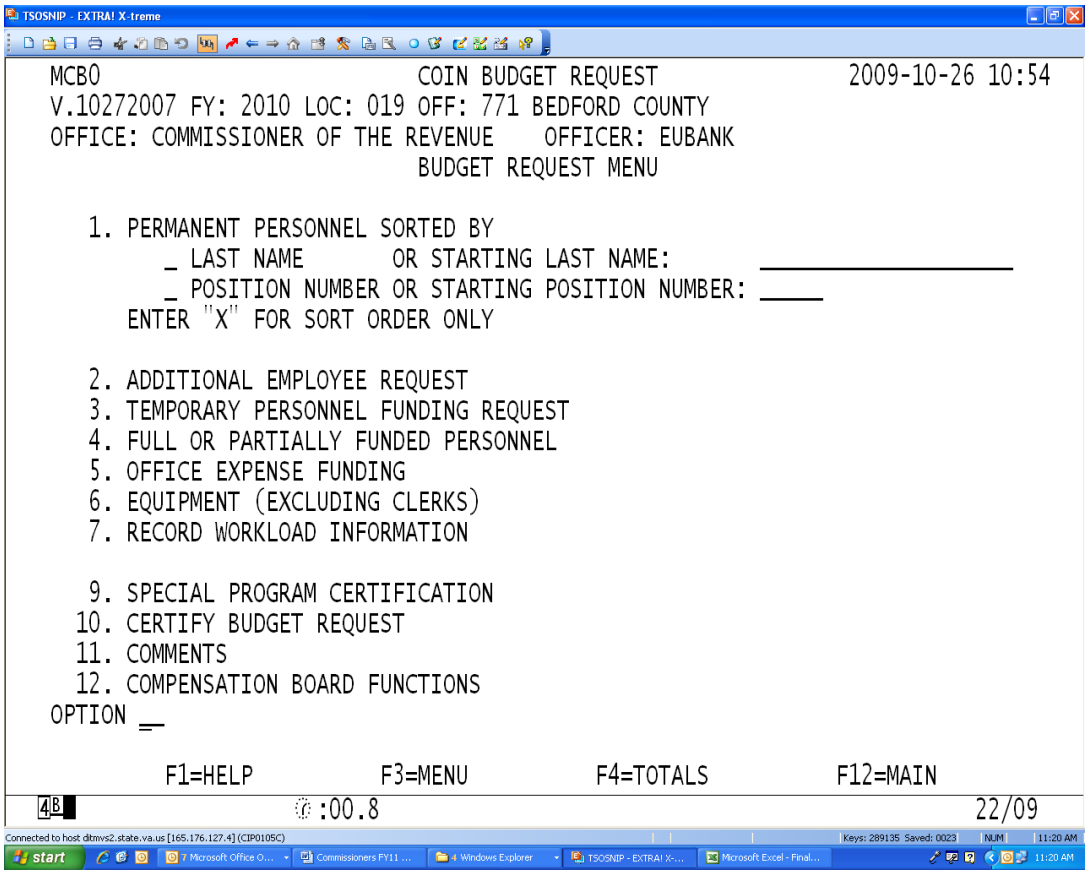


```
MCB0                          COIN BUDGET REQUEST                2009-10-26 10:54
V.10272007 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY
OFFICE: COMMISSIONER OF THE REVENUE    OFFICER: EUBANK
                              BUDGET REQUEST MENU

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

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

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

         F1=HELP          F3=MENU          F4=TOTALS          F12=MAIN
4B                  :00.8                                          22/09
```

Helpful Hints:

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

Budget Request Menu



Helpful Hints (Continued):

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

Procedures:

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

3. Option #1, Permanent Personnel

Purpose:

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

Navigational Path:

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

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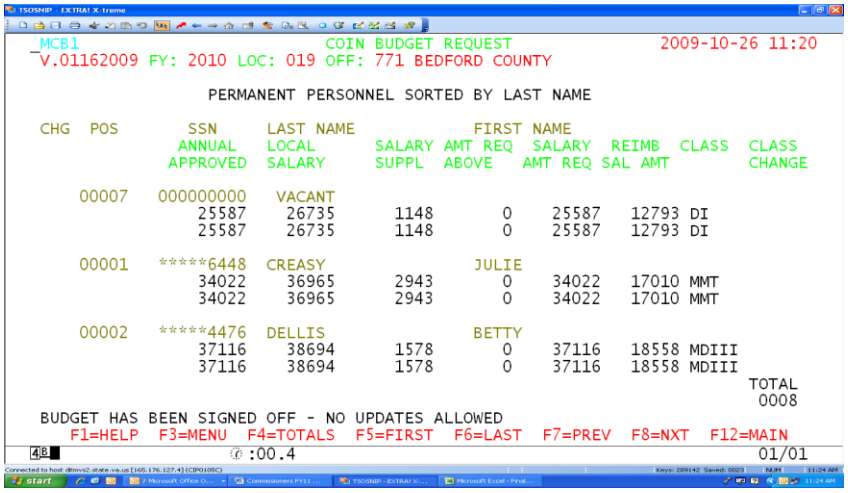
```
TSOSNIP - EXTRA! X-treme
MCB1                        COIN BUDGET REQUEST                2009-10-26 11:20
V.01162009 FY: 2010 LOC: 019 OFF: 771 BEDFORD COUNTY

                 PERMANENT PERSONNEL SORTED BY LAST NAME

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

    00007   000000000   VACANT
                25587    26735      1148      0    25587   12793 DI
                25587    26735      1148      0    25587   12793 DI

    00001   *****6448   CREASY               JULIE
                34022    36965      2943      0    34022   17010 MMT
                34022    36965      2943      0    34022   17010 MMT

    00002   *****4476   DELLIS               BETTY
                37116    38694      1578      0    37116   18558 MDIII
                37116    38694      1578      0    37116   18558 MDIII
                                                                    TOTAL
                                                                     0008
BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED
   F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
4B                  :00.4                                            01/01
Connected to host ditmvs2.state.va.us [165.176.127.4] (CIP0105C)   Keys: 289142 Saved: 0023   NUM   11:22 AM
start   7 Microsoft Office O...   Commissioners FY11 ...   TSOSNIP - EXTRA! X-...   Microsoft Excel - Final...   11:22 AM
```

Option #1 Permanent Personnel



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

                    PERMANENT PERSONNEL SORTED BY LAST NAME

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

      00007   000000000   VACANT
                 25587     26735      1148       0    25587   12793 DI
                 25587     26735      1148       0    25587   12793 DI

      00001   *****6448   CREASY               JULIE
                 34022     36965      2943       0    34022   17010 MMT
                 34022     36965      2943       0    34022   17010 MMT

      00002   *****4476   DELLIS               BETTY
                 37116     38694      1578       0    37116   18558 MDIII
                 37116     38694      1578       0    37116   18558 MDIII
                                                                          TOTAL
                                                                           0008
 BUDGET HAS BEEN SIGNED OFF - NO UPDATES ALLOWED
    F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
 4B                    :00.4                                              01/01
```

Helpful Hints:

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

PROCEDURES:

Annual Approved:	Supplied by CB (Can be changed by CB)
Local Salary:	Enter the total salary for each position, including locality supplement if applicable. If no local supplement funded press Enter and CB Annual Approved Salary will be used.
Salary Suppl:	Calculated for you = Total Locality amount minus the Compensation Board Approved Salary gives you the salary Supplement
Amt Req Above:	Calculated for you = Salary Amount Requested – Annual Salary gives you amount requested above
Sal Amt Req:	Entered by Officer or Compensation Board
Reimb Sal Amt:	For 771, this will appear with the % amount reimbursed - i.e. the 50% amount for Deputies
Class:	Supplied by system
Class Change:	Enter the class you are making a request to change for a salary alignment for the employee currently in this position. **(Do Not Enter A CB10 For This Request)**

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

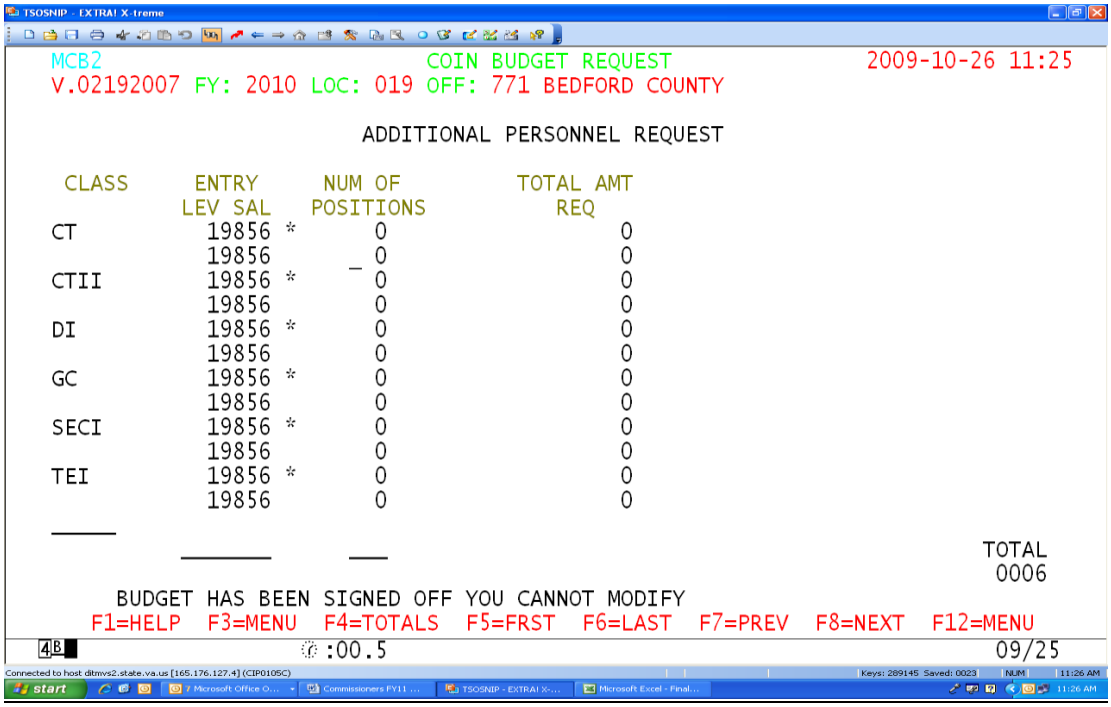
4. Option #2, Additional Personnel Request

Purpose:

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

Navigational Path:

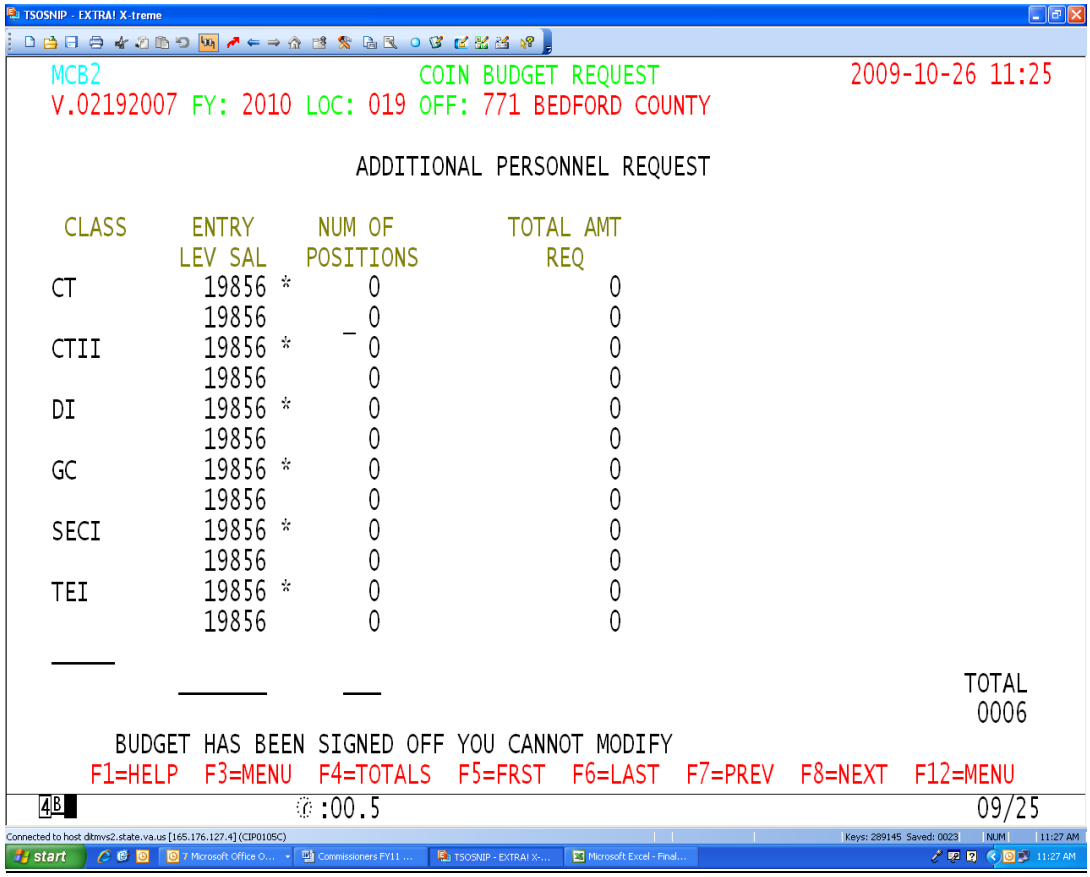
- Coin Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #2, Additional Personnel Request



Helpful Hints:

- Complete this section to request additional full-time CB funded positions of a predefined class, or
- Complete this section to request additional full-time CB funded positions other than a predefined class
- Blank data fields (Class, Entry Level Salary and Number of positions) are provided to enter 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 based upon the request and in accordance with the Compensation Board's staffing standards
- Valid Class must be entered; salary request must be between minimum and maximum of pay band of class requested

Option #2 Additional Personnel Request



Procedures:

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

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

5. Option #3, Temporary Personnel Fund Request

Purpose:

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

Navigational Path:

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

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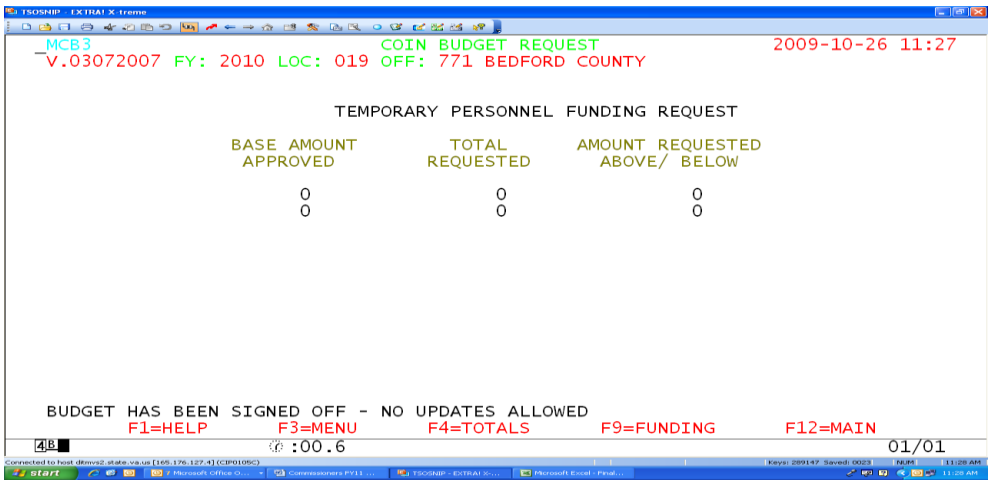
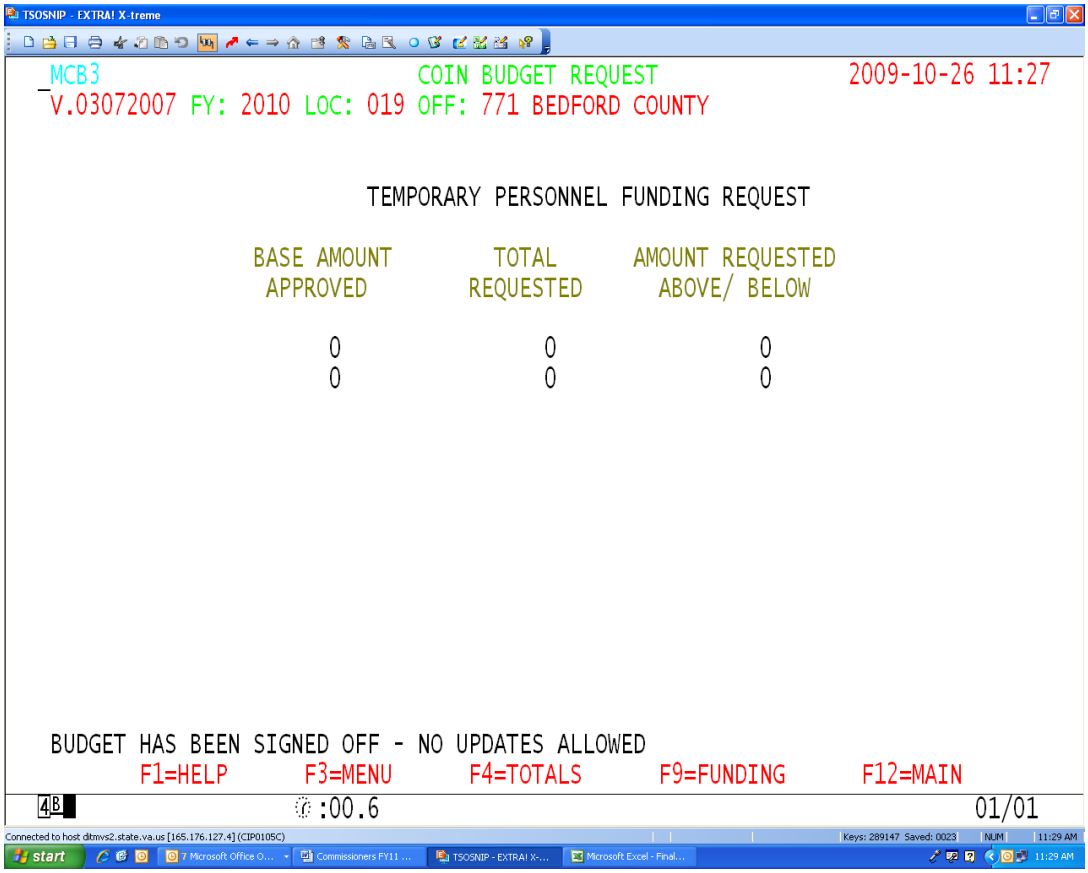


Helpful Hints:

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

Option #3, Temporary Personnel Fund Request



Procedures:

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

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

6. Option #4, Fully Or Partially Funded Personnel

Purpose:

The Fully or Partially Funded Personnel screen is accessed from the Budget Request Screen or Temporary Personnel Screen. Total Funds, Hourly Rate, class, first name, last name, fund source, and annual hours are displayed for a locality.

Navigational Path:

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

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MCBD                          COIN BUDGET REQUEST                10/10/2019 14:37
V.11232010 FY: 2020 LOC: 011 OFF: 771 APPOMATTOX COUNTY

                      FULLY OR PARTIALLY FUNDED PERSONNEL       PAGE 001 OF 001
              (DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)
DEL LAST NAME              FIRST NAME     CLASS HOURLY ANNL  TOTAL -FUND  SOURCE-
                                                RATE   HOURS FUNDS CB LOC FED OTH
 _ GREEN                   RACHEL         GC    011.15  2080 23192     X
 _ GELLER                  ROSS           GC    011.15  2080 23192     X
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _
 _ ______________________  ______________ ____  ______ _____ _____  _  _  _    _

                                          TOTAL FUNDS     46384

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

```
MCBD                          COIN BUDGET REQUEST                10/10/2019 14:37
V.11232010 FY: 2020 LOC: 011 OFF: 771 APPOMATTOX COUNTY

                      FULLY OR PARTIALLY FUNDED PERSONNEL       PAGE 001 OF 001
              (DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)
DEL LAST NAME              FIRST NAME     CLASS HOURLY ANNL  TOTAL -FUND  SOURCE-
                                                RATE   HOURS FUNDS CB LOC FED OTH
 _ GREEN                  RACHEL          GC    011.15  2080 23192     X
 _ GELLER                 ROSS            GC    011.15  2080 23192     X
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _
 _ ______________________ _______________ ______ ______ _____ _____  _  _  _   _

                                          TOTAL FUNDS     46384

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

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

```
MCBD                          COIN BUDGET REQUEST                 10/10/2019 14:37
V.11232010 FY: 2020 LOC: 011 OFF: 771 APPOMATTOX COUNTY

                     FULLY OR PARTIALLY FUNDED PERSONNEL       PAGE 001 OF 001
            (DOES NOT INCLUDE COMP BOARD PERMANENT PERSONNEL)
DEL LAST NAME              FIRST NAME     CLASS HOURLY ANNL  TOTAL -FUND  SOURCE-
                                                RATE   HOURS FUNDS CB LOC FED OTH
 _ GREEN                   RACHEL         GC    011.15  2080 23192     X
 _ GELLER                  ROSS           GC    011.15  2080 23192     X
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _
 _ ____________________    ______________ _____ ______ _____ _____  _  _  _    _

                                                TOTAL FUNDS     46384

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

Procedures:

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

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

7. Option #5, Office Expense Funding Request

Purpose:

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

Navigational Path:

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

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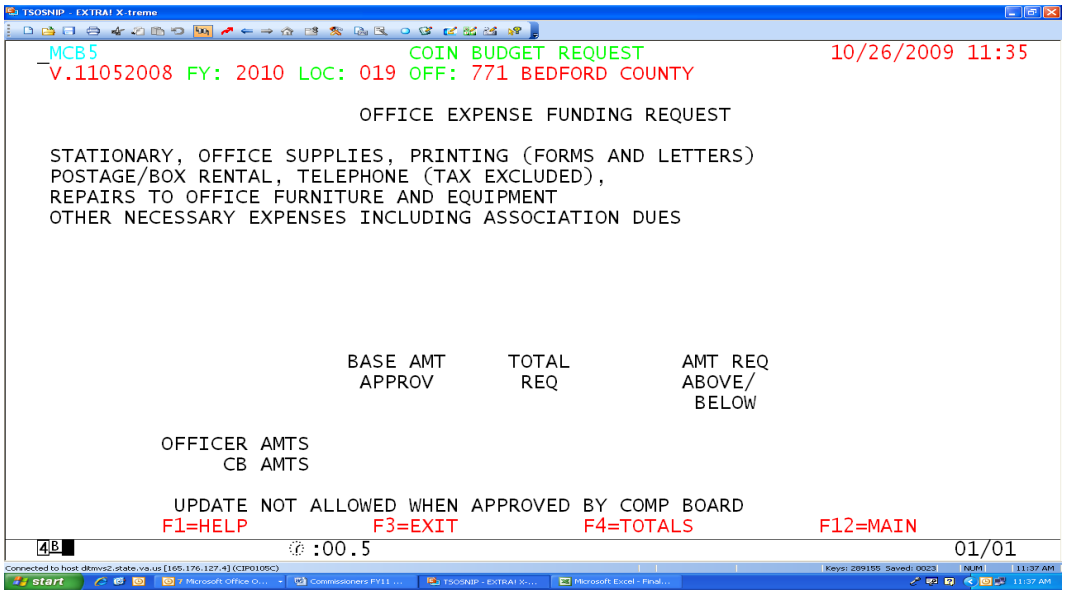
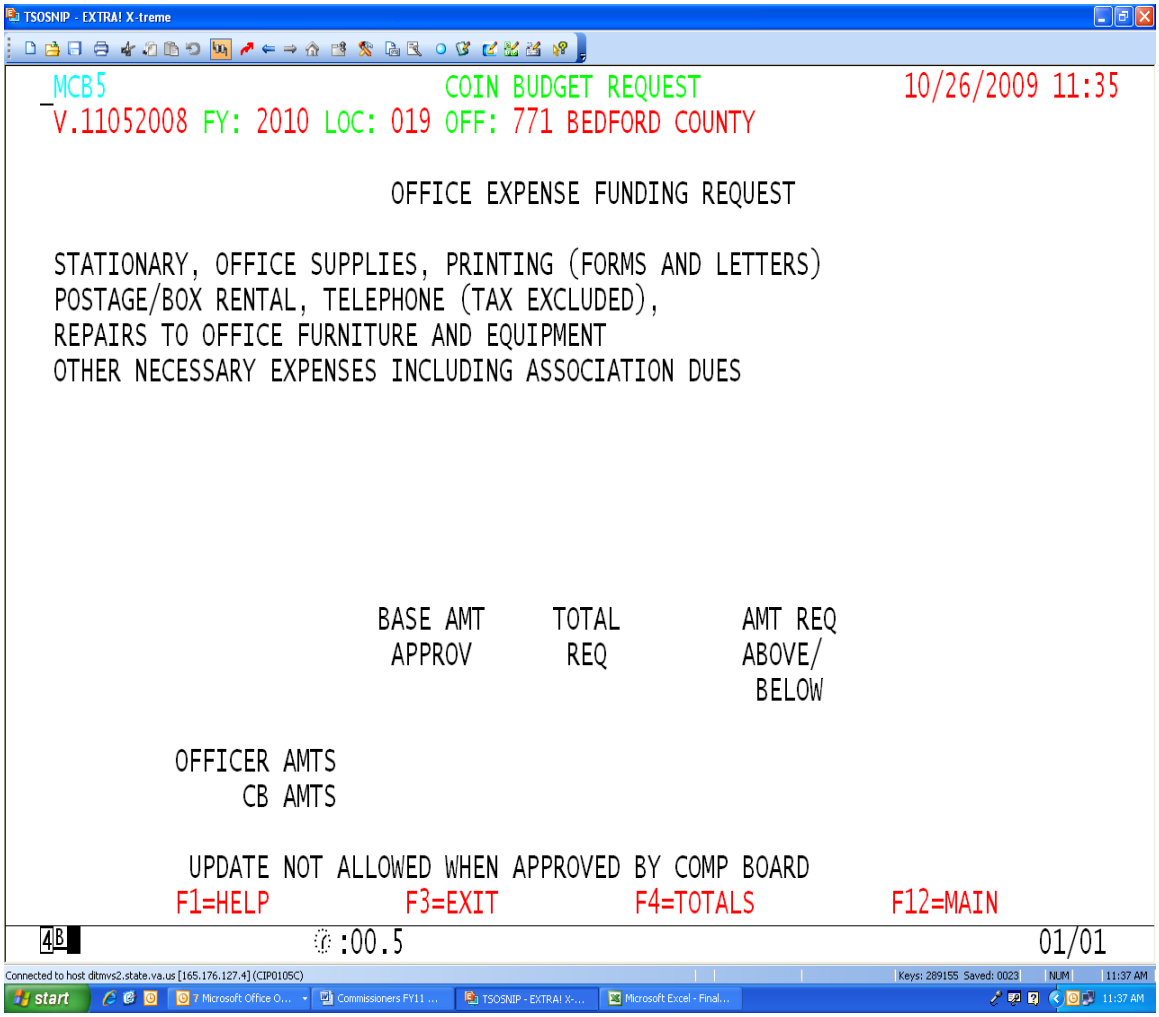


Helpful Hints:

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

Option #5, Office Expense Funding



Procedures:

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

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

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

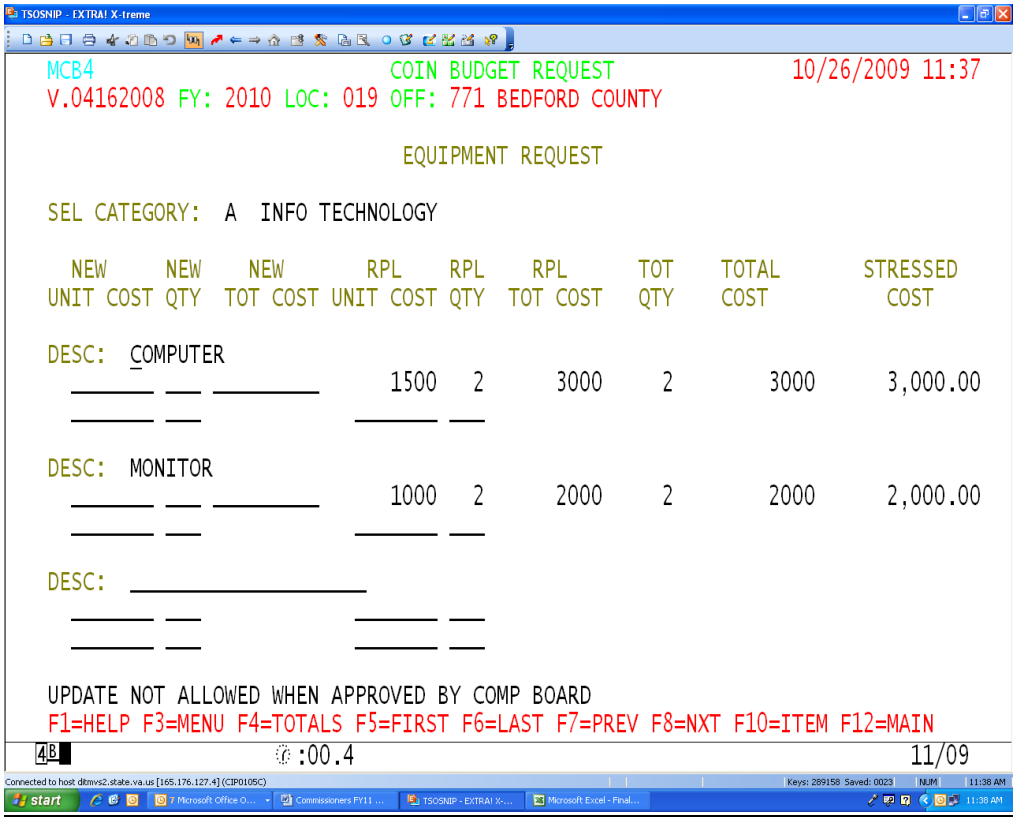
8. Option #6, Equipment

Purpose:

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

Navigational Path:

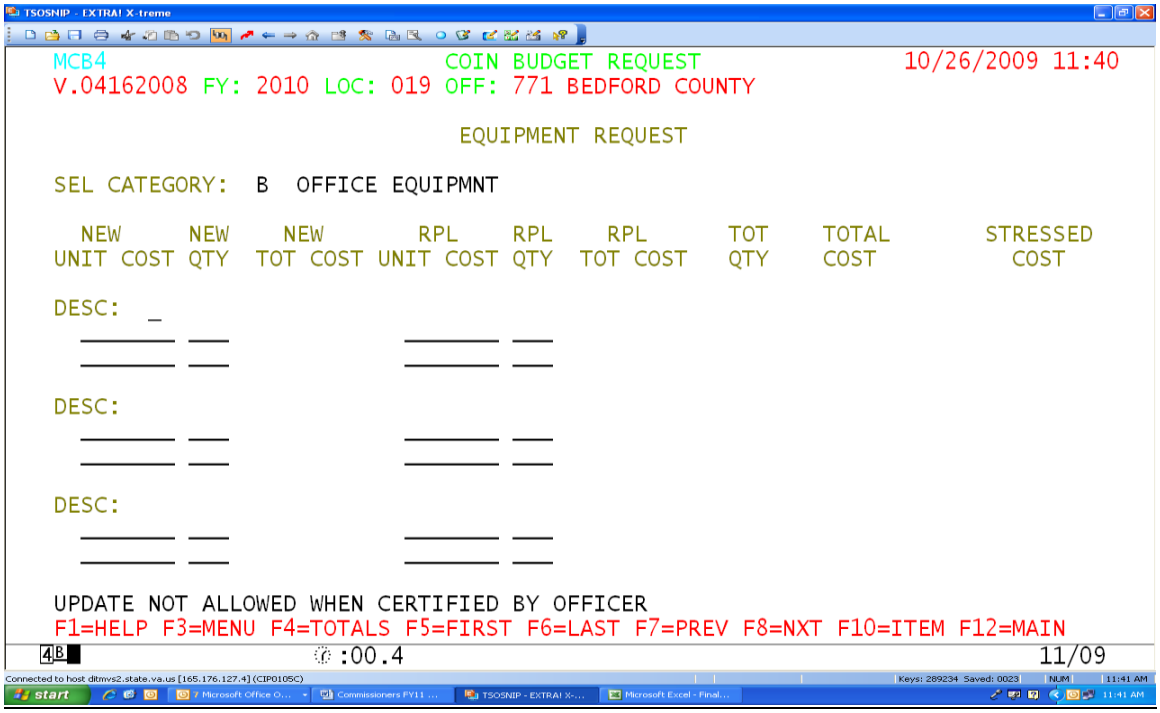
- COIN Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu – Select Option #6, Equipment



Helpful Hints:

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

Option #6 Equipment



Procedures:

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

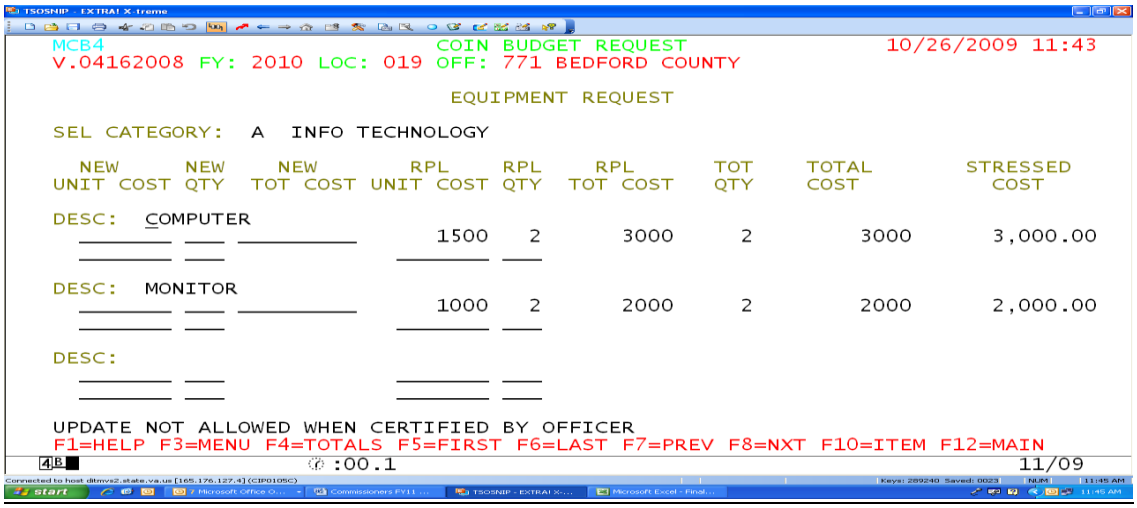
Desc:	List requested equipment or utilize the 'F1' help function	
New Unit Cost:	Enter unit cost of the new equipment requested	
New Qty:	Enter the quantity here, if this is New equipment not presently owned	
New Total Cost:	Calculated	
RPL Unit Cost:	Enter unit cost of the replacement equipment requested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

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

Option #6, Equipment

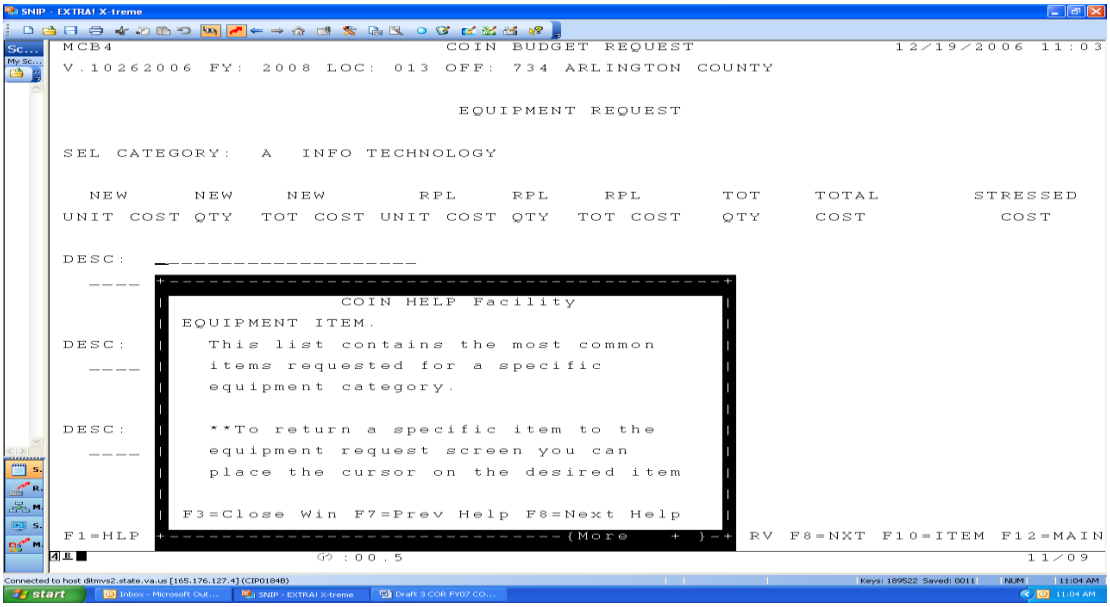
COMMISSONERS OF THE REVENUE

Category A – Information Technology (It) Equipment



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

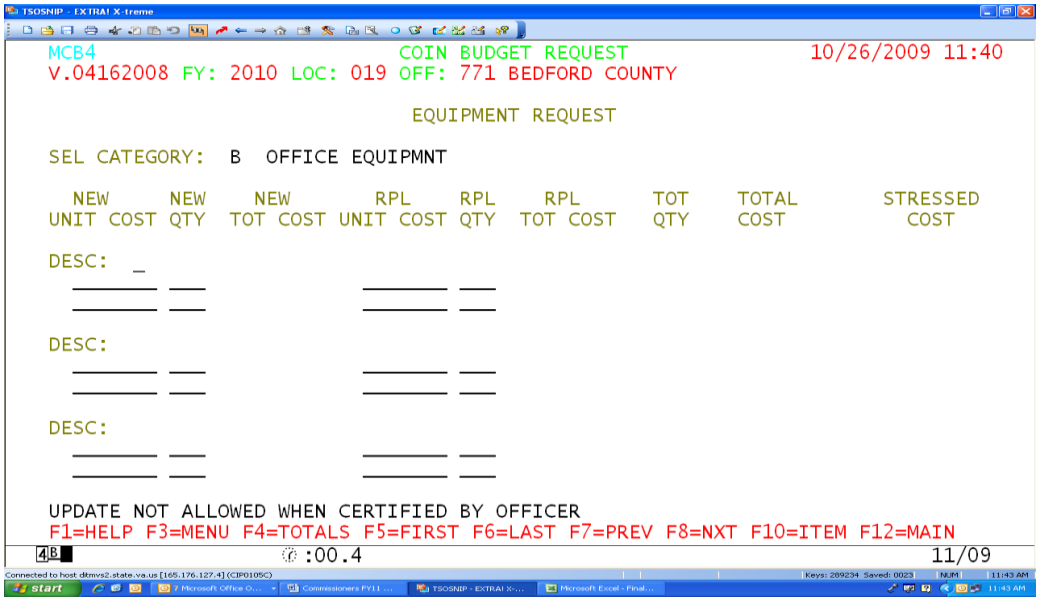
- Utilize **'F1= Help'** in any blank data field if you need help with a COIN data field
- Utilize **'F3 =Exit'** to close the help window
- Utilize '**F7 = Previous'** to move to the previous screen
- Utilize **'F8= Next'** to move to other listed equipment categories
- Utilize '**F17 = Substitute Value'**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



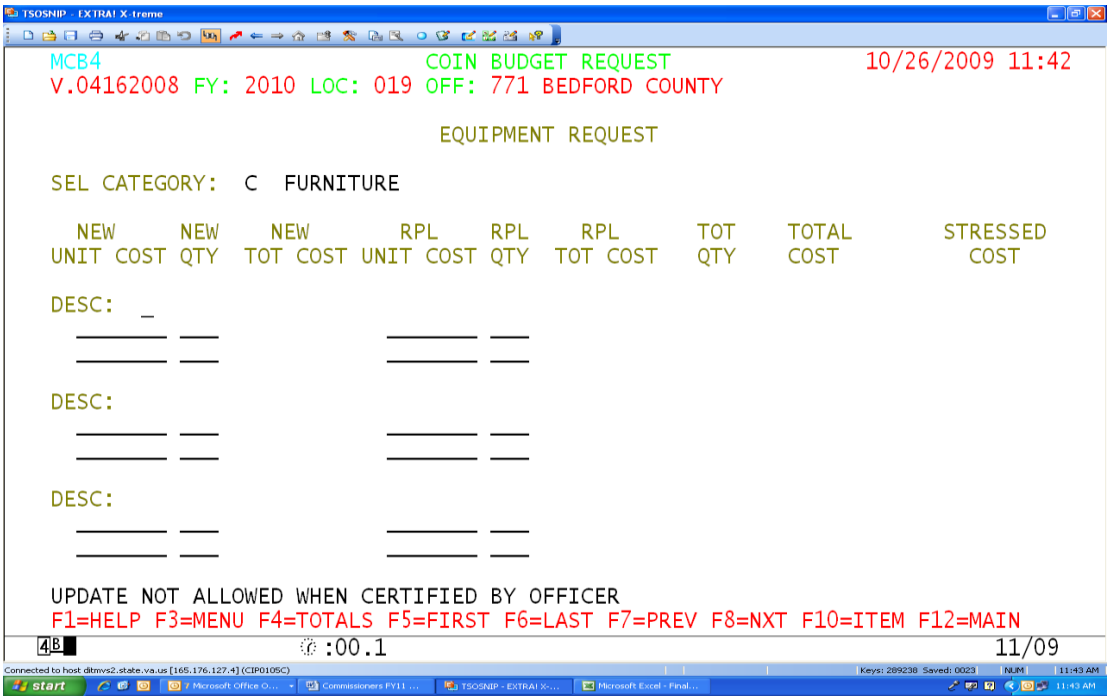
Option #6, Equipment

COMMISSONERS OF THE REVENUE

Category B – Office Equipment



Category C – Furniture Equipment



9. Option #7, Record Workload Information

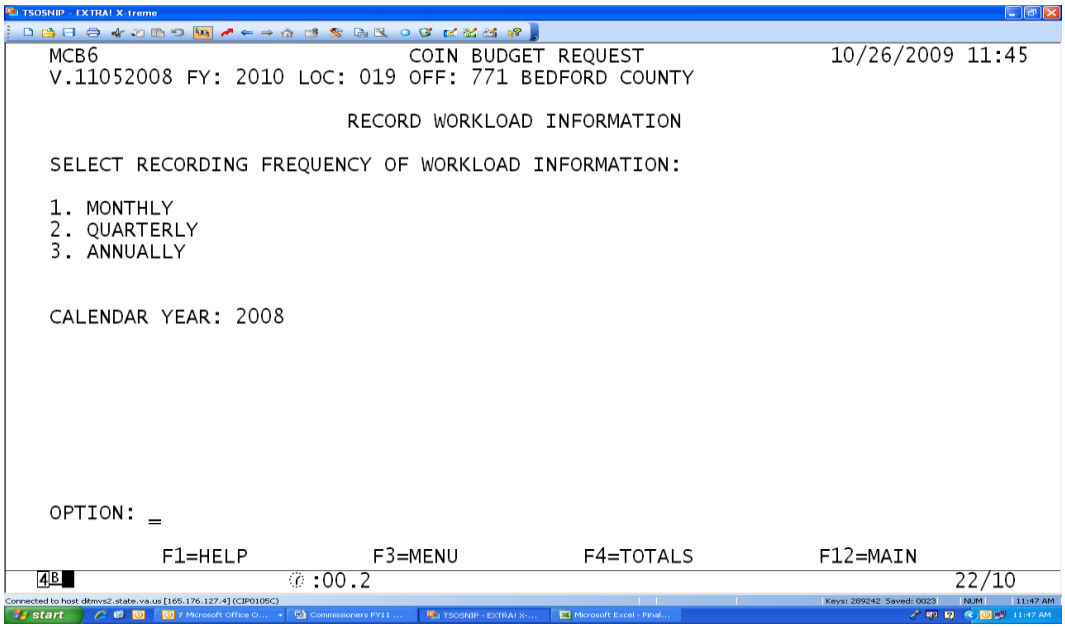
Purpose:

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

Navigational Path:

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

COMMISSONERS OF THE REVENUE



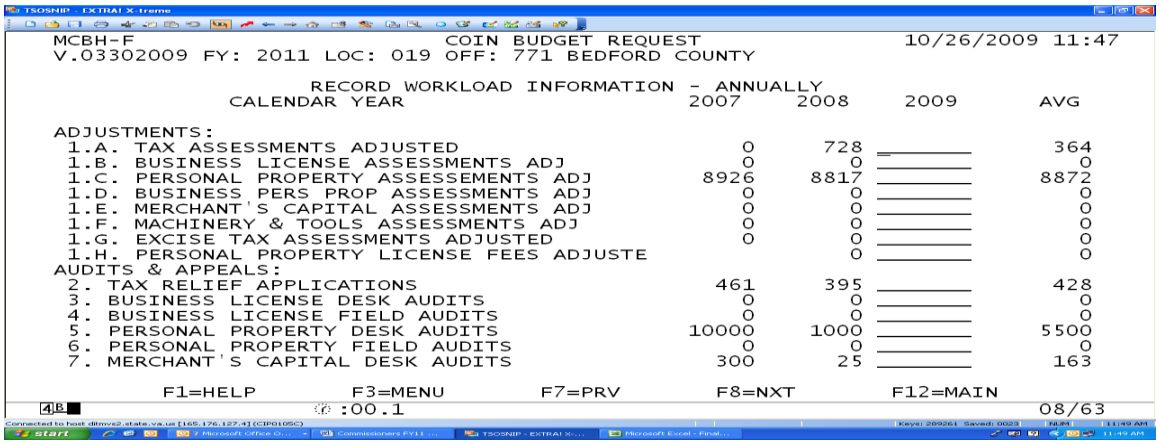
- In January 2018, offices must record one full year of workload data for the most recent Calendar Year
- Provide requested information in accordance with Section 15.2-1636.7, Code of Virginia. Information requested is based **on the most recent calendar year**
- Select 'Option #3' and press the "Enter" 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 generate an error message.
- 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



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

                  RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007     2008     2009      AVG

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

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

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

1. ***A. NUMBER OF REAL ESTATE TAX ASSESSMENTS ADJUSTED:*** *Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits* ***and may include the application of tax relief, tax credits, or land use programs****.*

   B. NUMBER OF BUSINESS LICENSE ASSESSMENTS ADJUSTED: *Enter the total number of adjustments that your office made during the year. This total should include any* ***increase or decrease in the original license fee based on discovery of gross receipts; or in the case of wholesalers, gross purchases. Adjustments may be made after discovery of new receipts, i.e. Schedule C; audits, which require additional information to be provided by the entity; and self-reporting errors.***

   C. NUMBER OF PERSONAL PROPERTY ASSESSMENTS ADJUSTED: *Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by proration or audits.* ***This does not include adjustments that were made to the personal property records prior to generation of the final Personal Property Book.***

   D. NUMBER OF BUSINESS PERSONAL PROPERTY ASSESSMENTS ADJUSTED: : *Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits.* ***An audit must include the requisition of additional information from the business that results in discovery of new property or an error in the original reporting.***

   E. NUMBER OF MERCHANT'S CAPITAL ASSESSMENTS ADJUSTED: *Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits.* ***An audit must include the requisition of additional information from the business that results in discovery of new capital or an error in the original reporting.***

   F. NUMBER OF MACHINERY & TOOLS ASSESSMENTS ADJUSTED: *Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits.* ***An audit must include the requisition of additional information from the business that results in discovery of new machinery and tools or an error in the original reporting.***

   G. NUMBER OF EXCISE TAX ASSESSMENTS ADJUSTED: *Enter the total number of adjustments that your office made during the year. This total should include any adjustments caused by audits.* ***This should include audits that apply to meals, lodging, admissions, short term rental, cigarettes and any other local excise taxes assessed.***

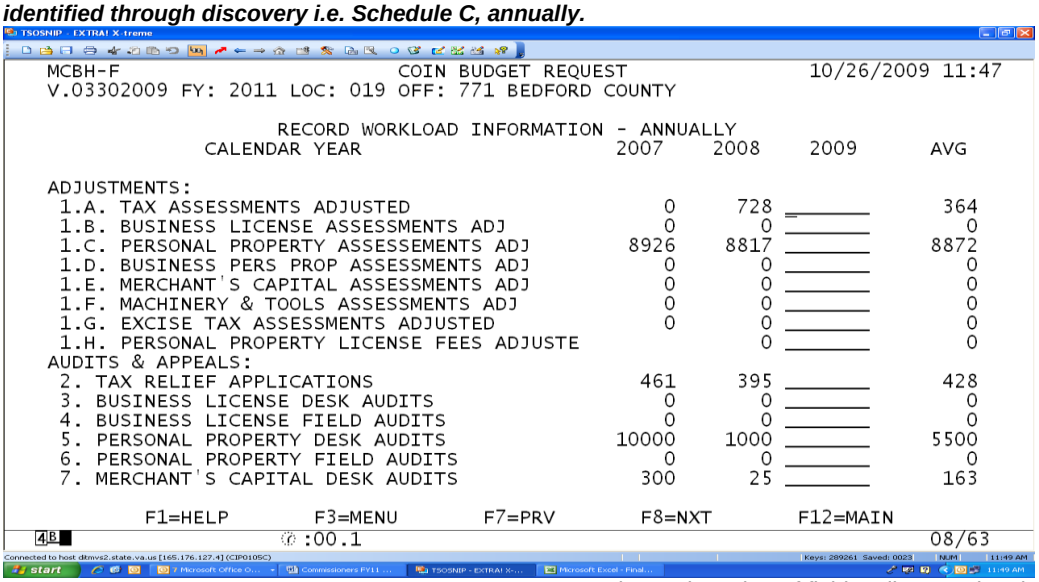
   H. NUMBER OF LICENSE FEES ADJUSTED: Enter the of license fees adjusted by your office as a result of proration or disposal of a vehicle.

Audits & Appeals

Definition: Auditing is a systematic process of objectively obtaining and evaluating evidence regarding assertions about economic actions and events to ascertain the degree of correspondence between the assertions and established criteria. For purpose of the following section, the COR or

Deputy must summons additional information in writing and compare the new information to that which was originally reported.

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



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

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

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

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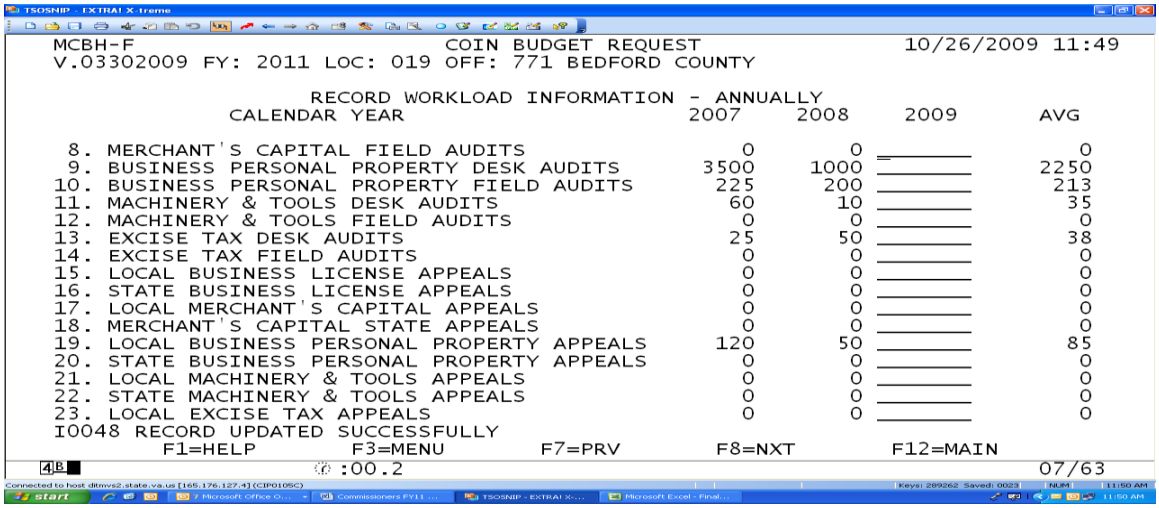

4. ***NUMBER OF BUSINESS LICENSE FIELD AUDITS:*** *Enter the total number of field audits completed on business license accounts annually.* ***A field audit requires a visit to the physical location of the business. Enter the number of new taxpayers identified through field discovery annually****.*
5.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

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

Screen 2 of 6



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MCBH-F                    COIN BUDGET REQUEST                    10/26/2009 11:49
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007    2008    2009      AVG

 8. MERCHANT'S CAPITAL FIELD AUDITS                   0       0 _______       0
 9. BUSINESS PERSONAL PROPERTY DESK AUDITS         3500    1000 _______    2250
10. BUSINESS PERSONAL PROPERTY FIELD AUDITS         225     200 _______     213
11. MACHINERY & TOOLS DESK AUDITS                    60      10 _______      35
12. MACHINERY & TOOLS FIELD AUDITS                    0       0 _______       0
13. EXCISE TAX DESK AUDITS                           25      50 _______      38
14. EXCISE TAX FIELD AUDITS                           0       0 _______       0
15. LOCAL BUSINESS LICENSE APPEALS                    0       0 _______       0
16. STATE BUSINESS LICENSE APPEALS                    0       0 _______       0
17. LOCAL MERCHANT'S CAPITAL APPEALS                  0       0 _______       0
18. MERCHANT'S CAPITAL STATE APPEALS                  0       0 _______       0
19. LOCAL BUSINESS PERSONAL PROPERTY APPEALS        120      50 _______      85
20. STATE BUSINESS PERSONAL PROPERTY APPEALS          0       0 _______       0
21. LOCAL MACHINERY & TOOLS APPEALS                   0       0 _______       0
22. STATE MACHINERY & TOOLS APPEALS                   0       0 _______       0
23. LOCAL EXCISE TAX APPEALS                          0       0 _______       0
I0048 RECORD UPDATED SUCCESSFULLY
      F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                 :00.2                                              07/63
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8. ***NUMBER OF MERCHANT'S CAPITAL FIELD AUDITS:*** *Enter the total number of field audits completed on merchant's capital accounts annually.* ***A field audit requires a visit to the physical location of the business.*** *Enter the number of new taxpayers identified through field discovery annually.*
9. ***NUMBER OF BUSINESS PERSONAL PROPERTY DESK AUDITS:*** *Enter the total number of desk audits completed on business personal property annually.* ***A desk audit must follow the above stated definition.*** *Enter the number of new taxpayers identified through discovery annually.*
10. ***NUMBER OF BUSINESS PERSONAL PROPERTY FIELD AUDITS:*** *Enter the total number of field audits completed on business personal property annually.* ***A field audit requires a visit to the physical location of the property.*** *Enter the number of new taxpayers identified through discovery annually.*
11. ***NUMBER OF MACHINERY & TOOLS DESK AUDITS:*** *Enter the total number of desk audits completed on machinery & tools annually.* ***A desk audit must follow the above stated definition.*** *Enter the number of new taxpayers identified through discovery annually.*
12. ***NUMBER OF MACHINERY & TOOLS FIELD AUDITS:*** *Enter the total number of field audits completed on machinery & tools annually.* ***A field audit requires a visit to the physical location of the business.*** *Enter the number of new taxpayers identified through field discovery annually.*

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

20. ***NUMBER OF STATE BUSINESS PERSONAL PROPERTY APPEALS:*** *Enter the total number of written tax appeals filed with the State Tax Commissioner for business personal property tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*
21. ***NUMBER OF LOCAL MACHINERY & TOOLS APPEALS:*** *Enter the total number of written tax appeals filed locally for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*
22. ***NUMBER OF STATE MACHINERY & TOOLS APPEALS:*** *Enter the total number of written tax appeals filed with the State Tax Commissioner for machinery & tools tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*
23. ***NUMBER OF LOCAL EXCISE TAX APPEALS:*** *Enter the total number of written tax appeals filed locally for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*

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

Screen 3 of 6

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

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007     2008     2009      AVG

24. STATE EXCISE TAX APPEALS                          0        0 _________        0
25. LOCAL REAL ESTATE TAX APPEALS                   400      150 _________      275
26. STATE REAL ESTATE TAX APPEALS                     0        0 _________        0
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:
27. BUSINESS LIC/CAPITAL ACCTS                      594      581 _________      588
28. LAND USE TAX/ROLLBACK APPL                     5900     5900 _________     5900
29. EXCISE TAXES/BUSINESS ASSESSED                  179      221 _________      200
30.A. FINANCIAL INSTITUTIONS IN YOUR LOC              0       10 _________        5
30.B. FINANCIAL INST/BANK FRANCHISE TAX               4        1 _________        3
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS               4        4 _________        4
GENERAL ADMINISTRATIVE & LEGAL:
32. GENERAL ADMINISTRATIVE DUTIES                     0      250 _________      125
33. SUMMONS                                           5        0 _________        3
34. CRIMINAL FAILURE TO FILE COMPLAINTS               0        0 _________        0
35. WORKMAN'S COMPENSATION AFFIDAVITS                 0        0 _________        0
36. PILOT PROGRAMS                                    0        0 _________        0
I0048 RECORD UPDATED SUCCESSFULLY
      F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                  :00.1                                              07/63
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24. ***NUMBER OF STATE EXCISE TAX APPEALS:*** *Enter the total number of written tax appeals filed with the State Tax Commissioner for excise tax (see Va. Code § 58.1- 3703.1 & 58.1-3983.1).*

25. ***NUMBER OF REAL ESTATE TAX APPEALS:*** *Enter the total number of written tax appeals filed locally for real estate tax (see Va. Code § 58.1- 3350, 58.1-3351 & 58.1-3380).*

26. ***NUMBER OF REAL ESTATE TAX APPEALS:*** *Enter the total number of written tax appeals filed with the Circuit Court for real estate tax (see Va. Code § 58.1- 3382).*

Business Licenses, Merchants Capital & Excise

27. ***NUMBER OF BUSINESS LICENSES ISSUED AND MERCHANTS CAPITAL ACCOUNTS****: Enter the total number of all business licenses processed annually.* ***Do not multiply this number by any factor if you bill multiple times per year.*** *For those localities with merchant's capital, report the total number of accounts.*

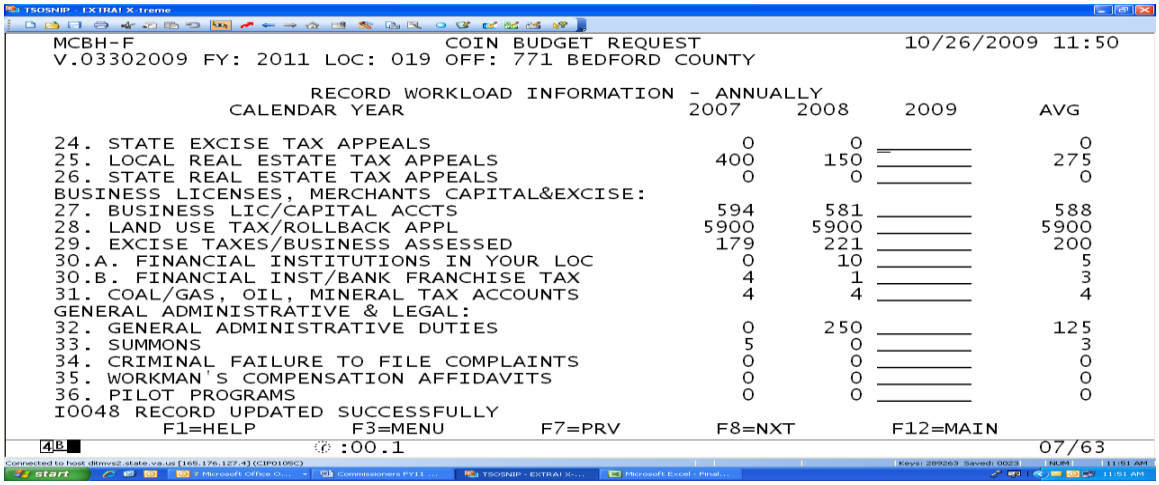
28. ***NUMBER OF APPLICATIONS PROCESSED FOR LAND USE TAXATION AND ROLLBACK ASSESSMENTS****: Enter the total number of land use and rollback applications processed.* ***This may be moved to the real estate section in future years.***

29. ***NUMBER OF BUSINESS ACCOUNTS ASSESSED FOR EXCISE TAXES*****:** Enter the total number of business accounts. This should include meals, lodging, admissions, short term rental, *right-of-way, 911, utility tax, consumption tax (including telephone and mobile phone tax), cigarettes* and any other local excise taxes assessed. ***Do not*** multiply this number by the number of processings during a year, i.e., ***Do not*** multiply by twelve for monthly processings or by four for quarterly processings.

30. ***A. NUMBER OF FINANCIAL INSTITUTIONS IN YOUR LOCALITY****. Enter the total number of financial institutions that are in your locality.*

B. NUMBER OF FINANCIAL INSTITUTIONS WITH THEIR MAIN OFFICE IN YOUR LOCALITY THAT ARE REQUIRED TO FILE THE BANK FRANCHISE TAX WITH YOUR OFFICE: *Enter the total number of banks that file returns with your office that can be verified with the Department of Taxation.*

31. ***NUMBER OF COAL/GAS SEVERANCE TAX, COAL ROAD TAX, OIL SEVERANCE TAX AND MINERAL TAX ACCOUNTS*****:** If your office handles these functions, enter the number of Coal/Gas Severance, Coal Road, Oil Severance and mineral taxes accounts. ***Do not*** multiply this figure by any factor if billed more than once a year.



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

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007     2008     2009       AVG

24. STATE EXCISE TAX APPEALS                        0        0 _________        0
25. LOCAL REAL ESTATE TAX APPEALS                 400      150 _________      275
26. STATE REAL ESTATE TAX APPEALS                   0        0 _________        0
BUSINESS LICENSES, MERCHANTS CAPITAL&EXCISE:
27. BUSINESS LIC/CAPITAL ACCTS                    594      581 _________      588
28. LAND USE TAX/ROLLBACK APPL                   5900     5900 _________     5900
29. EXCISE TAXES/BUSINESS ASSESSED                179      221 _________      200
30.A. FINANCIAL INSTITUTIONS IN YOUR LOC            0       10 _________        5
30.B. FINANCIAL INST/BANK FRANCHISE TAX             4        1 _________        3
31. COAL/GAS, OIL, MINERAL TAX ACCOUNTS             4        4 _________        4
GENERAL ADMINISTRATIVE & LEGAL:
32. GENERAL ADMINISTRATIVE DUTIES                   0      250 _________      125
33. SUMMONS                                         5        0 _________        3
34. CRIMINAL FAILURE TO FILE COMPLAINTS             0        0 _________        0
35. WORKMAN'S COMPENSATION AFFIDAVITS               0        0 _________        0
36. PILOT PROGRAMS                                  0        0 _________        0
I0048 RECORD UPDATED SUCCESSFULLY
      F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                  :00.1                                                    07/63
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General Administrative & Legal

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

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

Screen 4 of 6

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

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007     2008     2009       AVG

INCOME TAX:
37. STATE TAX RETURNS PROCESSED                     9085     9261 _______      9173
38. ESTIMATED STATE TAX ASSESSMENTS                 1593     1655 _______      1624
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX        1000     1000 _______      1000
40. STATE TAX RETURNS PREPARED                        40      200 _______       120
PERSONAL PROPERTY AND MACHINERY & TOOLS:
41. PERSONAL PROPERTY ASSESSEMENTS                123489   120838 _______    122164
42. PERSONAL PROPERTY REGISTRATION RENEWALS        59165    59244 _______     59205
43. PERSONAL PROPERTY NEW REGISTRATIONS            26510    23917 _______     25214
44. PERSONAL PROPERTY REGISTRATION DELETIONS       25254    19222 _______     22238
45. PERSONAL PROPERTY PRORATION ASSESSMENTS        51640    43078 _______     47359
46.A. PPTRA COMPLIANCE                             85852    82830 _______     84341
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN         3700     3500 _______      3600
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL            0                         0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL                0 _______         0
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS              0     0 _______         0
I0048 RECORD UPDATED SUCCESSFULLY
      F1=HELP        F3=MENU        F7=PRV        F8=NXT        F12=MAIN
4B                  :00.1                                                  08/63
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Income Tax

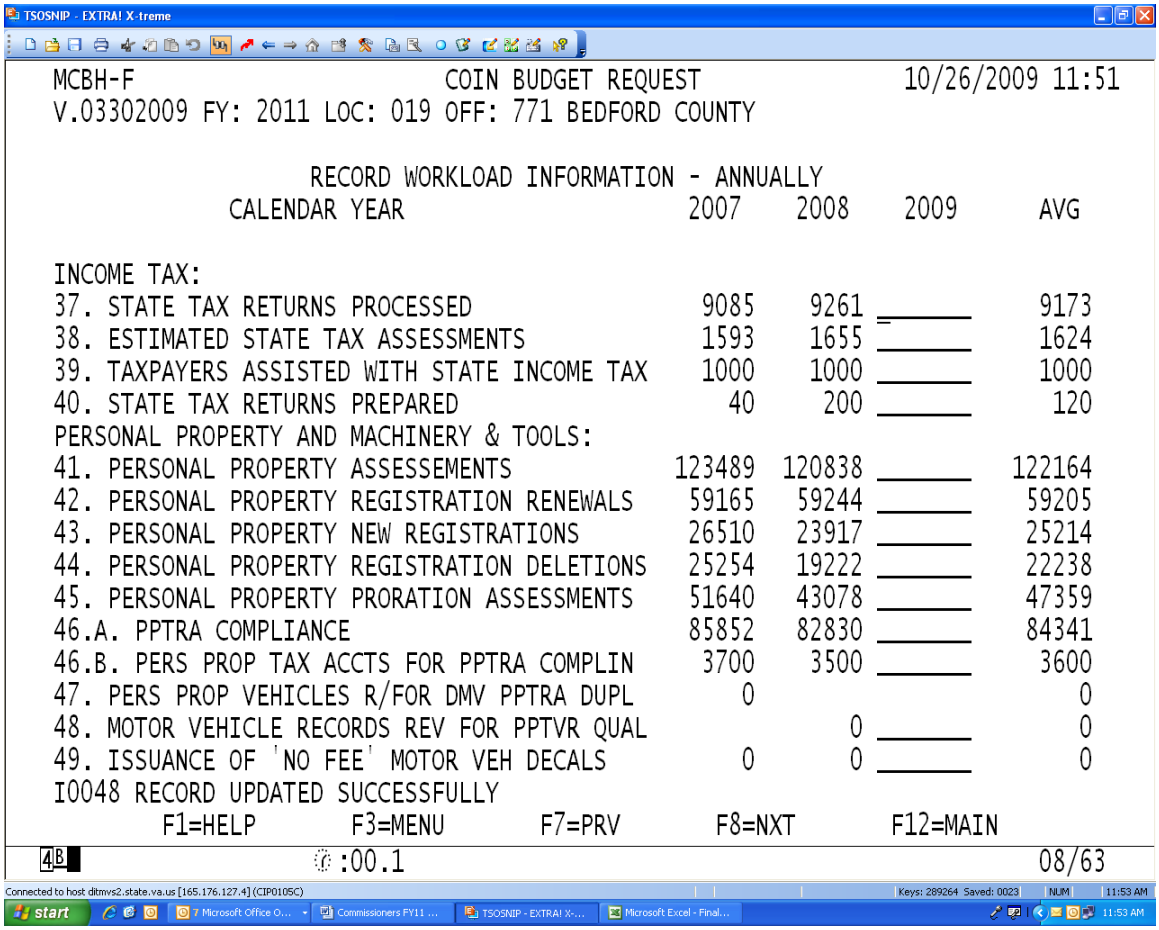
37. ***NUMBER OF STATE INCOME TAX RETURNS PROCESSED BY YOUR OFFICE*:** Enter the total number that can be verified by the Department of Taxation. **Do not** include tax returns prepared by your office. They will be counted under item #40 in the proposed new workload definitions.
38. ***NUMBER OF STATE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

Personal Property & Machinery and Tools

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

    B. NUMBER OF PERSONAL PROPERTY TAX ACCOUNTS REVIEWED FOR PPTRA COMPLIANCE: *Enter the total number of personal property tax accounts reviewed for PPTRA compliance (i.e. Schedule "C's", business trade name registrations, etc.).* ***Do Not*** *include vehicles adjusted (see current workload definition "Number of Tax Assessments Adjusted…" and proposed workload definition "Number of Personal Property Registrations").*

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



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

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2007    2008    2009      AVG

INCOME TAX:
37. STATE TAX RETURNS PROCESSED                   9085    9261 _______     9173
38. ESTIMATED STATE TAX ASSESSMENTS               1593    1655 _______     1624
39. TAXPAYERS ASSISTED WITH STATE INCOME TAX      1000    1000 _______     1000
40. STATE TAX RETURNS PREPARED                      40     200 _______      120
PERSONAL PROPERTY AND MACHINERY & TOOLS:
41. PERSONAL PROPERTY ASSESSEMENTS              123489  120838 _______   122164
42. PERSONAL PROPERTY REGISTRATION RENEWALS      59165   59244 _______    59205
43. PERSONAL PROPERTY NEW REGISTRATIONS          26510   23917 _______    25214
44. PERSONAL PROPERTY REGISTRATION DELETIONS     25254   19222 _______    22238
45. PERSONAL PROPERTY PRORATION ASSESSMENTS      51640   43078 _______    47359
46.A. PPTRA COMPLIANCE                           85852   82830 _______    84341
46.B. PERS PROP TAX ACCTS FOR PPTRA COMPLIN       3700    3500 _______     3600
47. PERS PROP VEHICLES R/FOR DMV PPTRA DUPL          0                        0
48. MOTOR VEHICLE RECORDS REV FOR PPTVR QUAL               0 _______        0
49. ISSUANCE OF 'NO FEE' MOTOR VEH DECALS            0     0 _______        0
I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP       F3=MENU       F7=PRV       F8=NXT       F12=MAIN
4B                    :00.1                                              08/63
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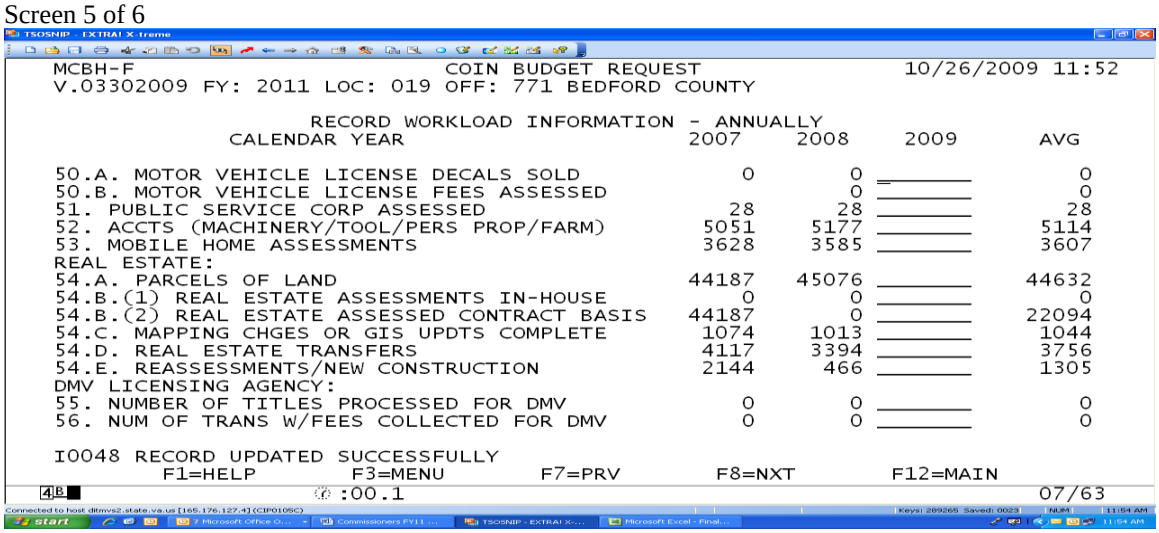
47. ***NO DATA RECORDED***
48. ***NUMBER OF QUALIFYING VEHICLE ASSESSMENTS REVIEWED IN ORDER TO DETERMINE THE PERCENTAGE OF PERSONAL PROPERTY RELIEF OFFERED TO TAXPAYERS***
49. ***NUMBER OF MOTOR VEHICLE "NO FEE" DECALS ISSUED (EX., MILITARY PERSONNEL OR OWNERSHIP TRANSFERS).***

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

Screen 5 of 6



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MCBH-F                          COIN BUDGET REQUEST                    10/26/2009 11:52
V.03302009 FY: 2011 LOC: 019 OFF: 771 BEDFORD COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                        2007     2008     2009       AVG

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

I0048 RECORD UPDATED SUCCESSFULLY
      F1=HELP      F3=MENU      F7=PRV      F8=NXT      F12=MAIN
4B                  :00.1                                          07/63
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50. ***A. NUMBER OF MOTOR VEHICLE LICENSE DECALS SOLD.***

50.b. **NUMBER OF MOTER VHEICLE LICENSE FEES ASSESSED**

51. ***NUMBER OF PUBLIC SERVICE CORPORATIONS THAT ARE ASSESSED*:** Enter the number of Public Service Corporations and Railroad companies that are assessed and that can be verified with the State Corporations Commission and the Department of Taxation.

52. ***NUMBER OF MACHINERY AND TOOLS, BUSINESS PERSONAL PROPERTY AND FARM ACCOUNTS*:** Enter the total number of manufacturing machinery and tools, business personal property and farm accounts that you assess. ***Do not*** multiply this figure by any factor if you prorate or bill more than once a year.

53. ***NUMBER OF MOBILE HOME ASSESSMENTS*:** Enter the total number of mobile homes that you treat as personal property. ***Do not*** multiply this figure by any factor if you prorate or bill more than once a year.

Real Estate

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

B. (1) NUMBER OF REAL ESTATE ASSESSMENTS CONDUCTED IN-HOUSE ANNUALLY DURING YOUR LOCALITY'S GENERAL REASSESSMENT: *If your office oversees the real estate assessment and conducts the general reassessment enter the number of real estate parcels assessed annually from the Assessor's General Reassessment Workload Achievement Log. (If you complete more than one log i.e. mineral accounts, land use accounts and land parcels, add the total for all logs and enter.)*

(2) NUMBER OF REAL ESTATE PARCELS ASSESSED ON A CONTRACT BASIS DURING YOUR LOCALITY'S GENERAL REASSESSMENT: *If your office hires an independent appraiser to assess real estate for your general reassessment enter the number of real estate parcels assessed.*

C. NUMBER OF MAPPING CHANGES OR GIS UPDATES COMPLETED.

D. NUMBER OF REAL ESTATE TRANSFERS: *If your office handles real estate, enter the total number of transfers of parcels for the year.*

E. NUMBER OF REASSESSMENTS DUE TO NEW CONSTRUCTION: *If your office assesses new construction, enter the total number of assessments adjusted due to new construction.* ***Do not*** *enter the total number of building permits.* ***Do not*** *enter the number of visits to a property for measurements and listings.*

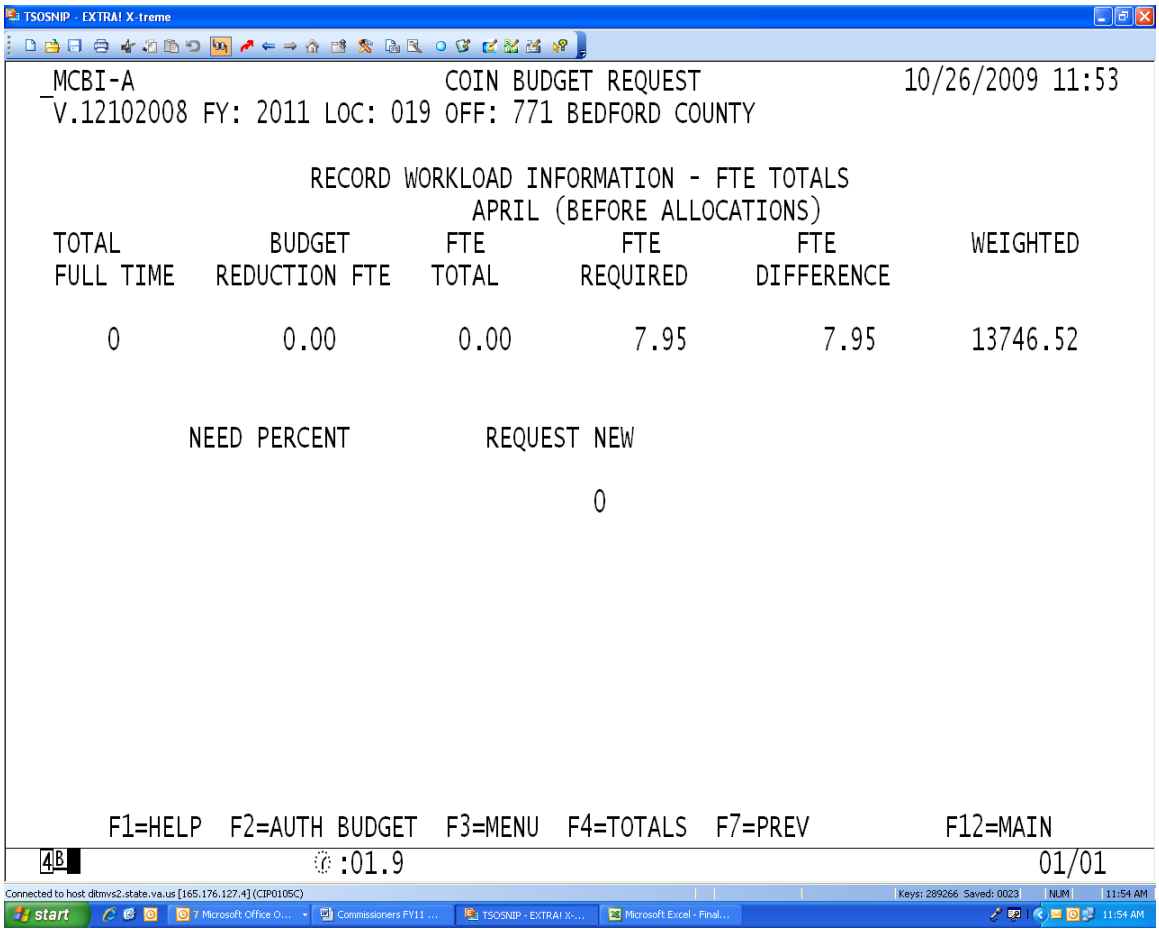
DMV Licensing Agency

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

56. ***TOTAL NUMBER OF TRANSACTIONS WHERE FEES ARE COLLECTED FOR DMV AS A DMV LICENSING AGENT***

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

Screen 6 of 6



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

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

    0           0.00         0.00         7.95         7.95        13746.52


         NEED PERCENT          REQUEST NEW

                                     0 ...

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

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

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

Option #7, Record Workload Information

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

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

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

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

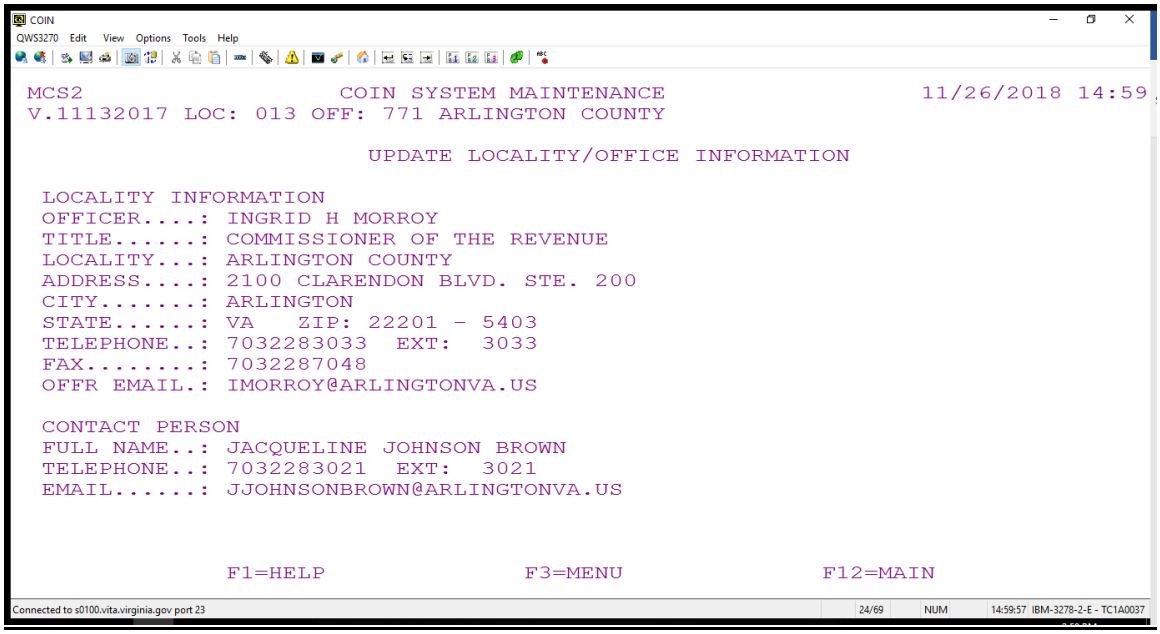
10. Option #8 – Update Locality Information

Purpose:

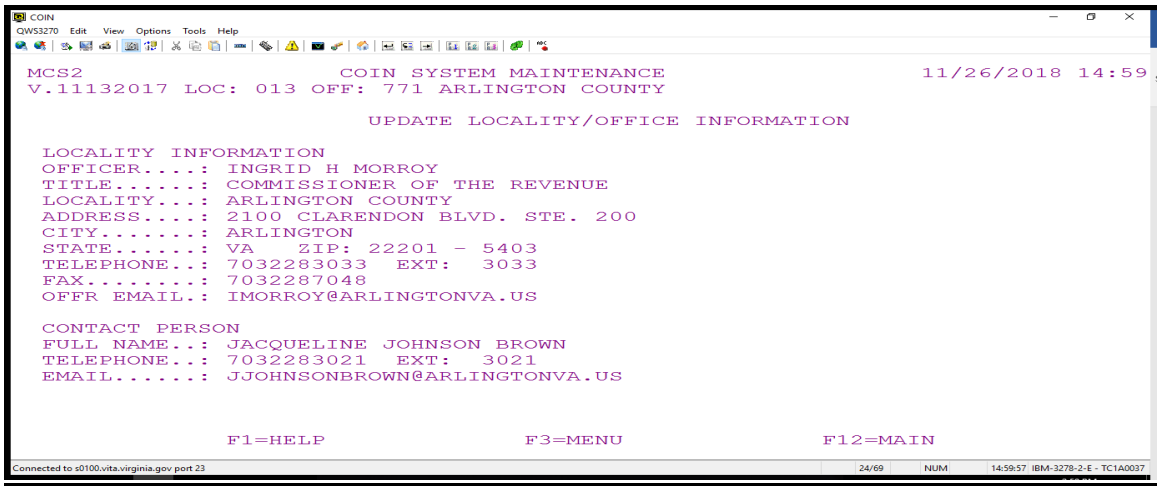
This screen will be displayed when 'Option #8, Update Locality Information' is selected on the Budget Request Menu. This screen is available for updating the locality address, phone, and fax numbers. It is also used to advise the Compensation Board staff of appropriate contacts for questions regarding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

Navigational Path:

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



Option #8 Update Locality Information



11. Option #9, Special Program Certification

Purpose:

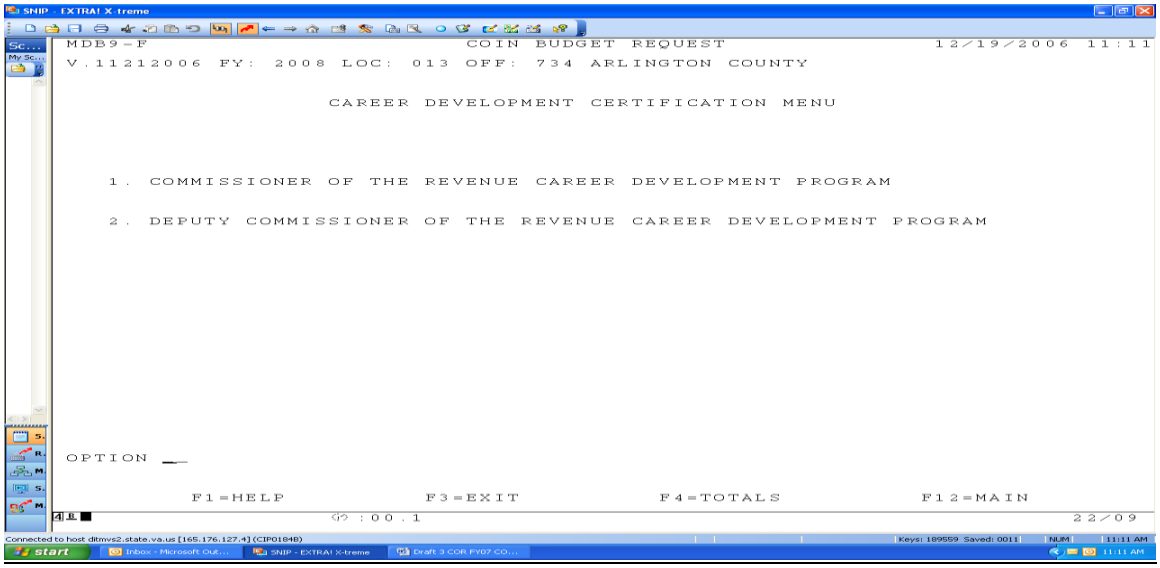
Specified Certification Programs are accessed from the COIN Budget Request menu. The program will determine based on locality and office which special programs to display.

- **Commissioners of the Revenue Career Development Program**
  - **If the Commissioner of the Revenue is not certified** you **must** answer the question "Commissioner meets all Criteria of CDP Y/N" with "N" for No and signoff on the program. This verifies that the screen was viewed by each office.
  - If the Commissioner of the Revenue has already received their increase they **must** re-apply for career development **each year** by completing the Commissioner of the Revenue Career Development Certification in COIN by February 1 to maintain the CDP increase.
  - The Officer must adopt the Deputy Commissioner Career Development Program to be eligible for participation in the Commissioner of the Revenue Career Development Program.
  - Do not enter the Commissioner's name on this screen.

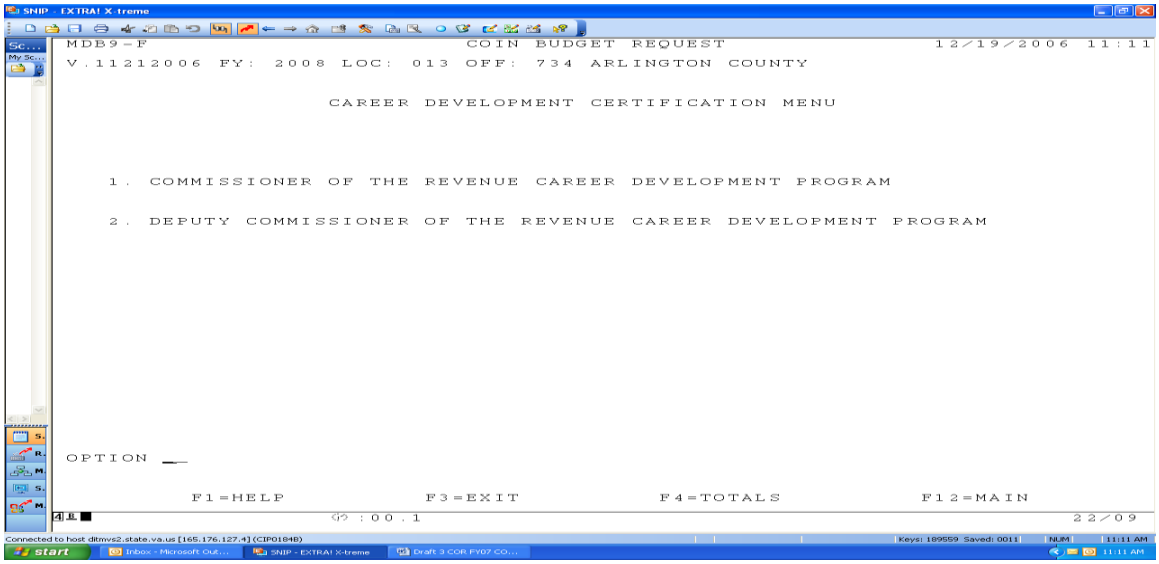
- **Deputy Commissioners of the Revenue Career Development Program**
  - ✓ The blanks on this screen are only for the names of Certified Deputy Commissioners, **not** deputies who are participating and enrolled.
  - ✓ Deputies that have already received their CDP increase **must** be entered on this screen **each year** to maintain the salary increase for the Career Development Program.

Navigational Path:

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



Option #9, Special Program Certification



Procedures:

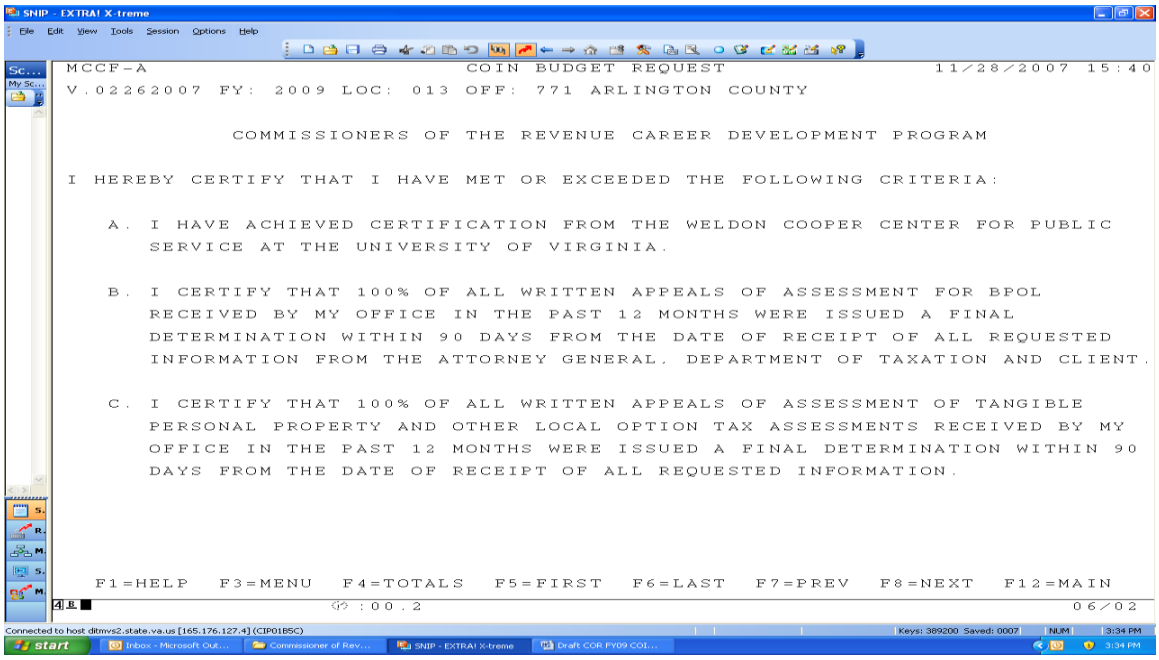
- Read through each Special Program Certification Screen and if you comply with the program criteria as stated
  - ✓ List employees that participate in the Career Development Programs
  - ✓ Enter the Officer's SCB USERID as the Approval User-ID

- Option #1 Commissioner of the Revenue Career Development Program
- Option #2 Deputy Commissioner of the Revenue Career Development Program

Option #9, Special Program Certification

Option #1 Commissioner of the Revenue Career Development Program

Screen 1 of 7



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MCCF-A                          COIN BUDGET REQUEST                    11/28/2007 15:40
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

              COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

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

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

   B. I CERTIFY THAT 100% OF ALL WRITTEN APPEALS OF ASSESSMENT FOR BPOL
      RECEIVED BY MY OFFICE IN THE PAST 12 MONTHS WERE ISSUED A FINAL
      DETERMINATION WITHIN 90 DAYS FROM THE DATE OF RECEIPT OF ALL REQUESTED
      INFORMATION FROM THE ATTORNEY GENERAL, DEPARTMENT OF TAXATION AND CLIENT.

   C. I CERTIFY THAT 100% OF ALL WRITTEN APPEALS OF ASSESSMENT OF TANGIBLE
      PERSONAL PROPERTY AND OTHER LOCAL OPTION TAX ASSESSMENTS RECEIVED BY MY
      OFFICE IN THE PAST 12 MONTHS WERE ISSUED A FINAL DETERMINATION WITHIN 90
      DAYS FROM THE DATE OF RECEIPT OF ALL REQUESTED INFORMATION.

  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                                  :00.2                                     06/02
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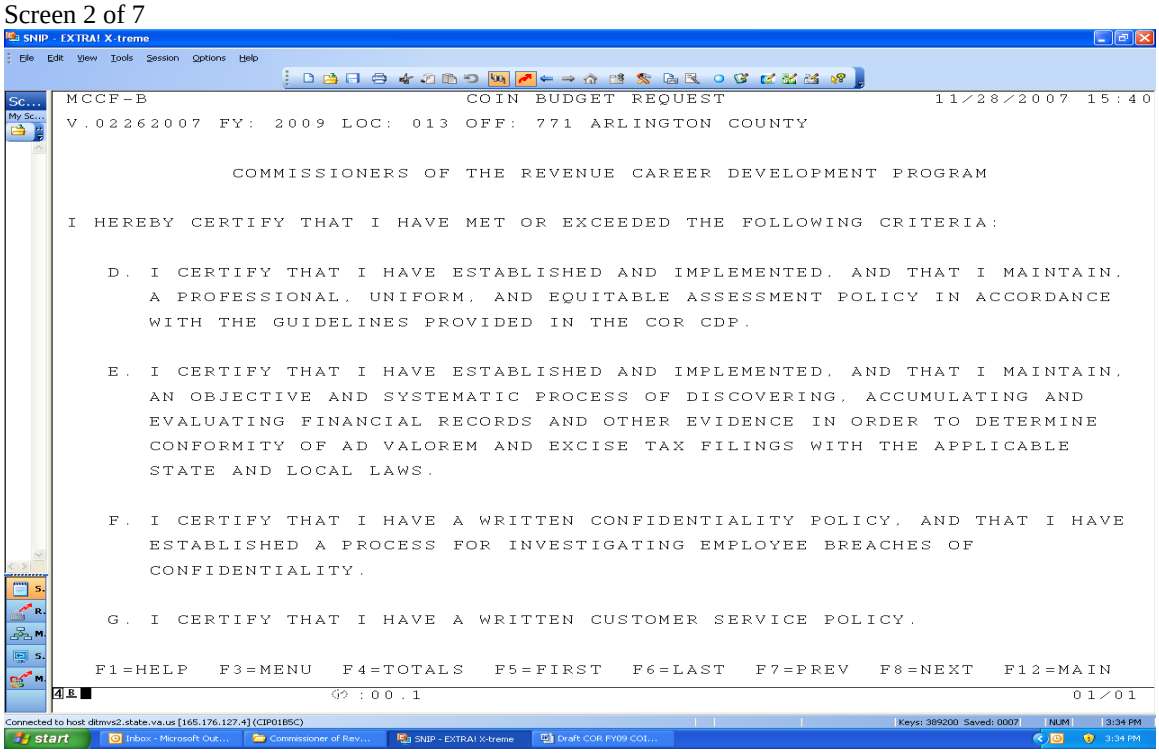
Read and then Press 'F8' to proceed to the next page

Screen 2 of 7



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MCCF-B                          COIN BUDGET REQUEST                    11/28/2007 15:40
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

              COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

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

   D. I CERTIFY THAT I HAVE ESTABLISHED AND IMPLEMENTED, AND THAT I MAINTAIN,
      A PROFESSIONAL, UNIFORM, AND EQUITABLE ASSESSMENT POLICY IN ACCORDANCE
      WITH THE GUIDELINES PROVIDED IN THE COR CDP.

   E. I CERTIFY THAT I HAVE ESTABLISHED AND IMPLEMENTED, AND THAT I MAINTAIN,
      AN OBJECTIVE AND SYSTEMATIC PROCESS OF DISCOVERING, ACCUMULATING AND
      EVALUATING FINANCIAL RECORDS AND OTHER EVIDENCE IN ORDER TO DETERMINE
      CONFORMITY OF AD VALOREM AND EXCISE TAX FILINGS WITH THE APPLICABLE
      STATE AND LOCAL LAWS.

   F. I CERTIFY THAT I HAVE A WRITTEN CONFIDENTIALITY POLICY, AND THAT I HAVE
      ESTABLISHED A PROCESS FOR INVESTIGATING EMPLOYEE BREACHES OF
      CONFIDENTIALITY.

   G. I CERTIFY THAT I HAVE A WRITTEN CUSTOMER SERVICE POLICY.

  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                                  :00.1                                     01/01
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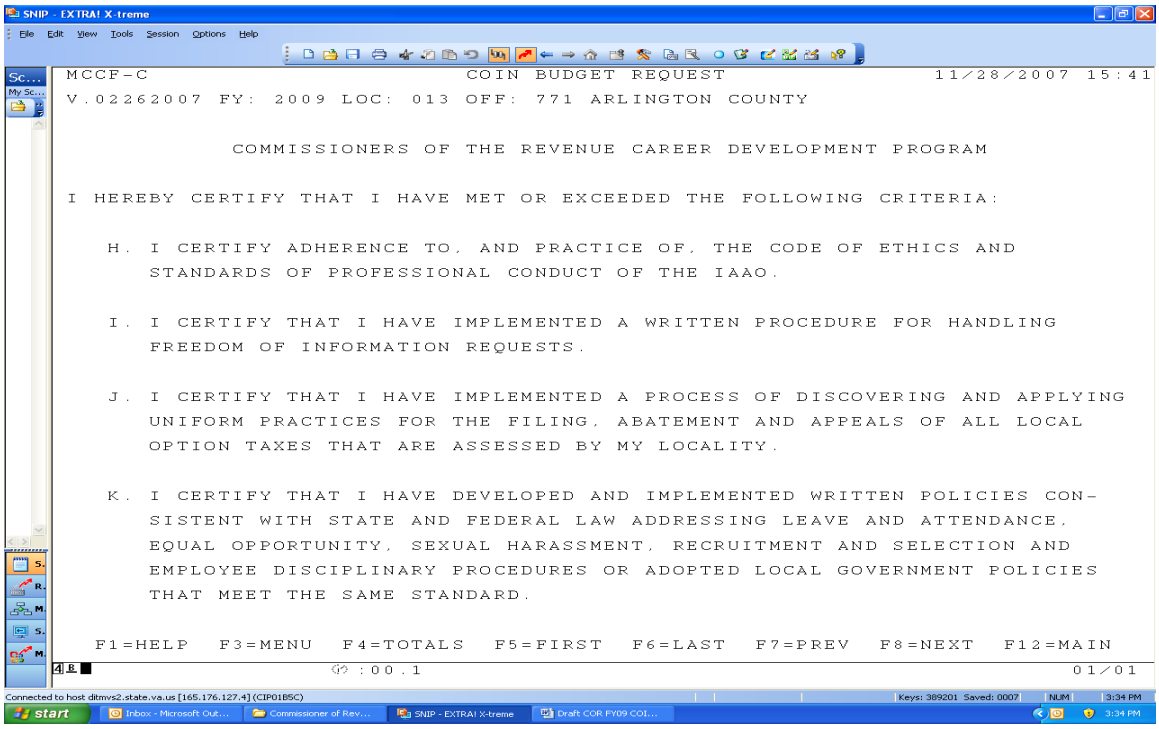
Read and then Press 'F8' to proceed to the next page

Option #9, Special Program Certification

Screen 3 of 7



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MCCF-C                          COIN BUDGET REQUEST                    11/28/2007  15:41
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

              COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

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

   H. I CERTIFY ADHERENCE TO, AND PRACTICE OF, THE CODE OF ETHICS AND
      STANDARDS OF PROFESSIONAL CONDUCT OF THE IAAO.

   I. I CERTIFY THAT I HAVE IMPLEMENTED A WRITTEN PROCEDURE FOR HANDLING
      FREEDOM OF INFORMATION REQUESTS.

   J. I CERTIFY THAT I HAVE IMPLEMENTED A PROCESS OF DISCOVERING AND APPLYING
      UNIFORM PRACTICES FOR THE FILING, ABATEMENT AND APPEALS OF ALL LOCAL
      OPTION TAXES THAT ARE ASSESSED BY MY LOCALITY.

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

  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                          :00.1                                              01/01
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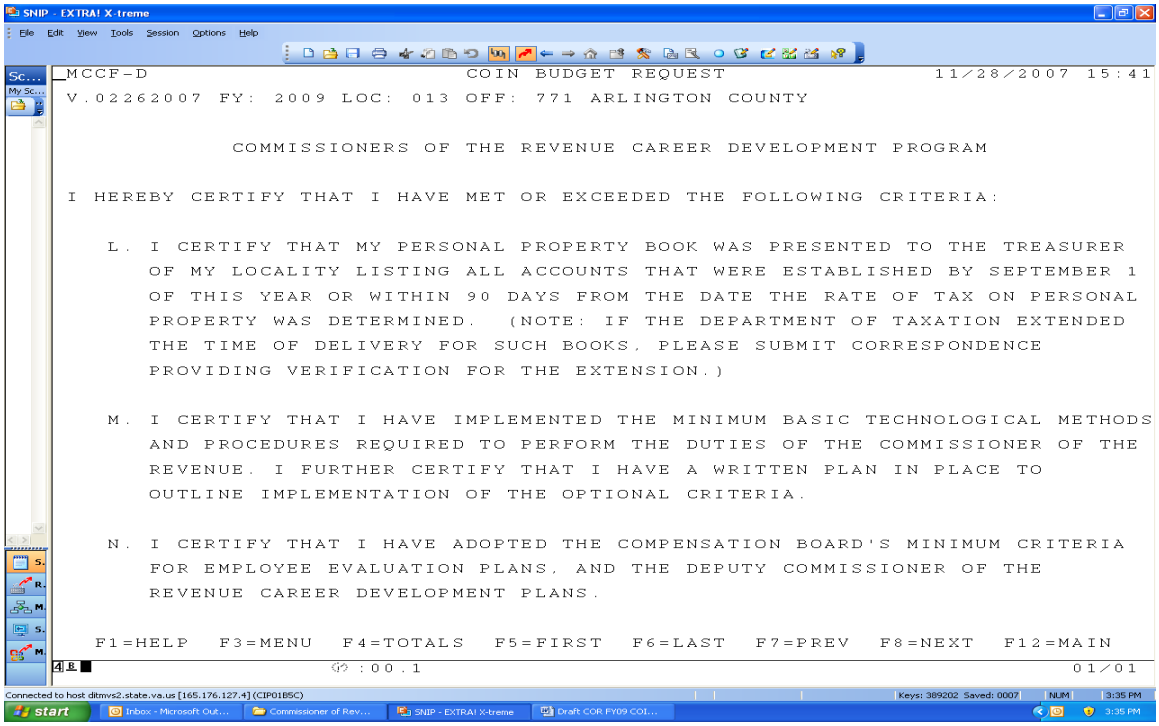
Read and then Press 'F8' to proceed to the next page

Screen 4 of 7



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MCCF-D                          COIN BUDGET REQUEST                    11/28/2007  15:41
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

              COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

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

   L. I CERTIFY THAT MY PERSONAL PROPERTY BOOK WAS PRESENTED TO THE TREASURER
      OF MY LOCALITY LISTING ALL ACCOUNTS THAT WERE ESTABLISHED BY SEPTEMBER 1
      OF THIS YEAR OR WITHIN 90 DAYS FROM THE DATE THE RATE OF TAX ON PERSONAL
      PROPERTY WAS DETERMINED.  (NOTE: IF THE DEPARTMENT OF TAXATION EXTENDED
      THE TIME OF DELIVERY FOR SUCH BOOKS, PLEASE SUBMIT CORRESPONDENCE
      PROVIDING VERIFICATION FOR THE EXTENSION.)

   M. I CERTIFY THAT I HAVE IMPLEMENTED THE MINIMUM BASIC TECHNOLOGICAL METHODS
      AND PROCEDURES REQUIRED TO PERFORM THE DUTIES OF THE COMMISSIONER OF THE
      REVENUE. I FURTHER CERTIFY THAT I HAVE A WRITTEN PLAN IN PLACE TO
      OUTLINE IMPLEMENTATION OF THE OPTIONAL CRITERIA.

   N. I CERTIFY THAT I HAVE ADOPTED THE COMPENSATION BOARD'S MINIMUM CRITERIA
      FOR EMPLOYEE EVALUATION PLANS, AND THE DEPUTY COMMISSIONER OF THE
      REVENUE CAREER DEVELOPMENT PLANS.

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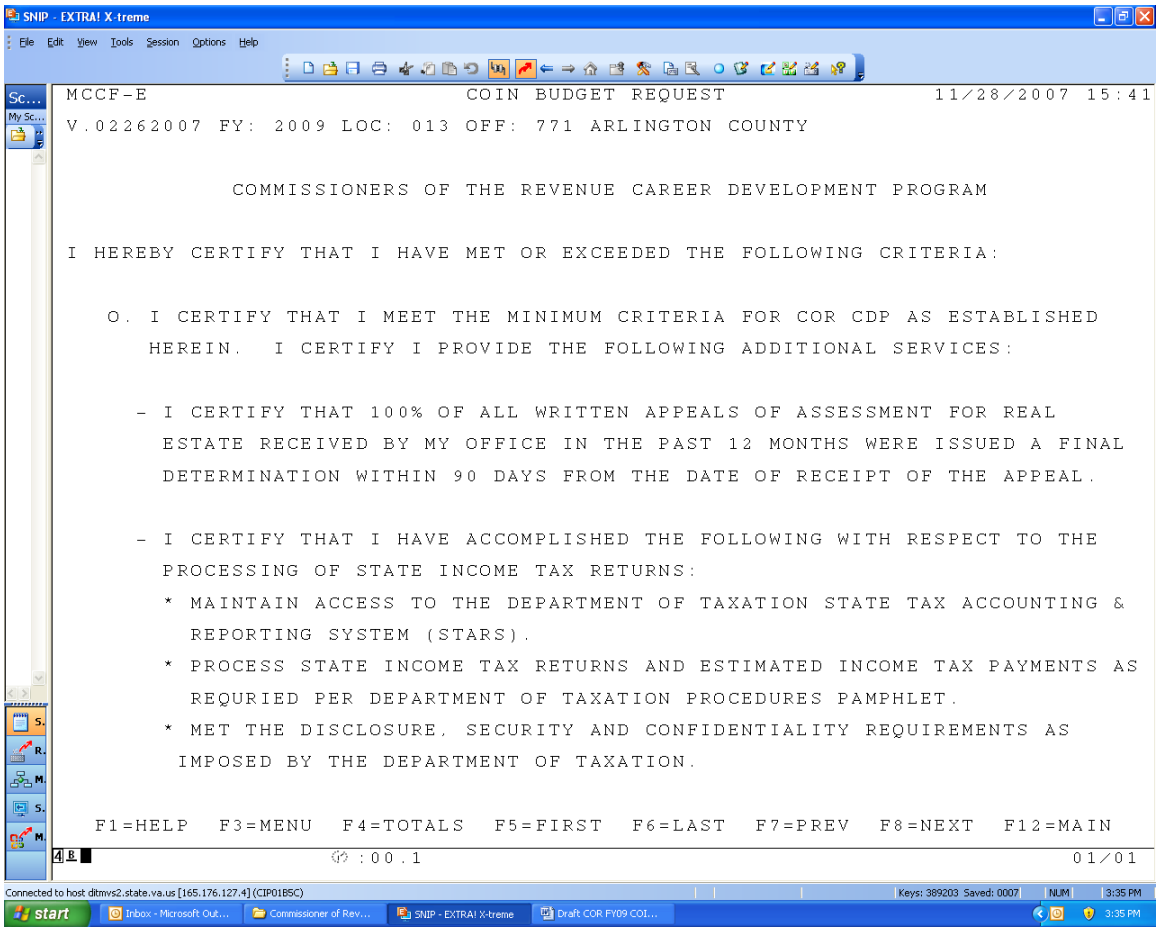

Read and then Press 'F8' to proceed to the next page

Option #9, Special Program Certification

Screen 5 of 7

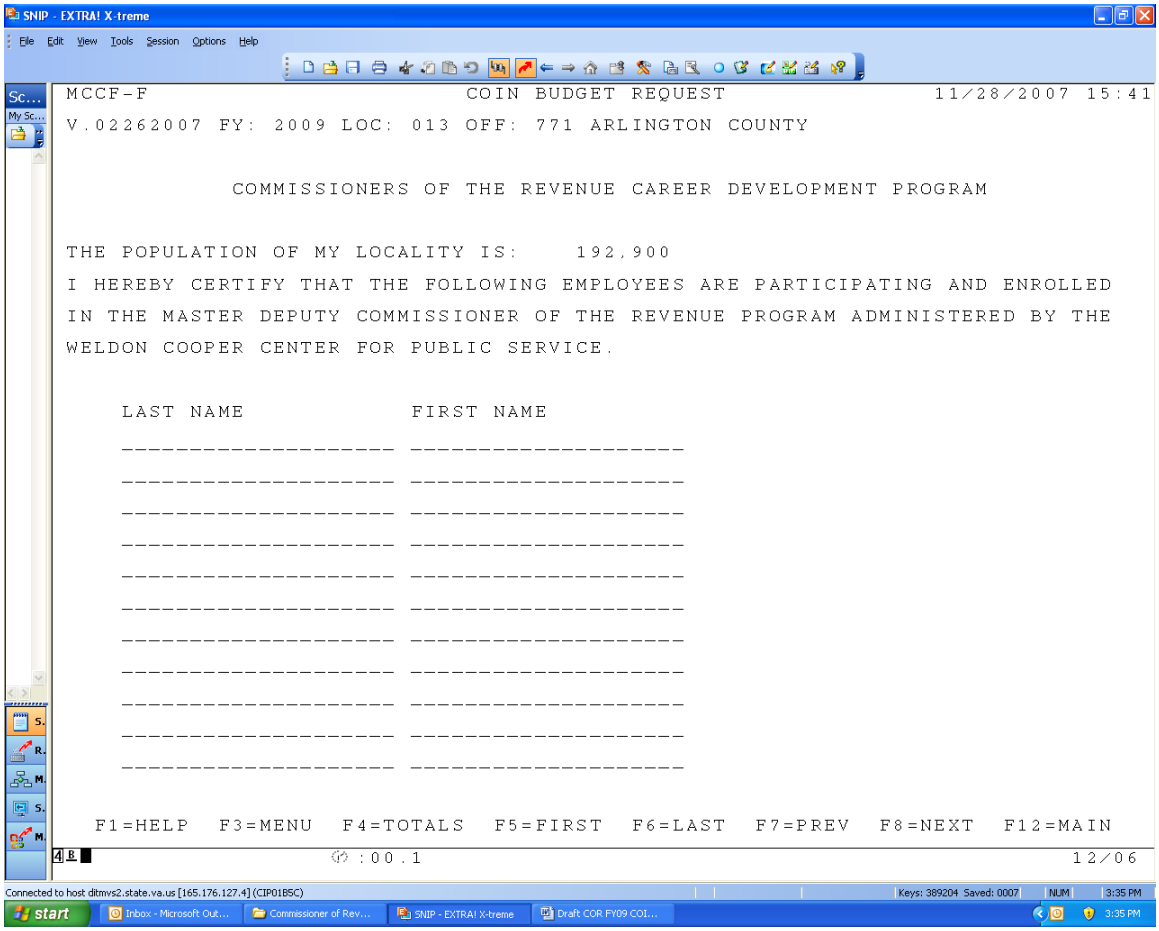


```
MCCF-E                          COIN BUDGET REQUEST                 11/28/2007 15:41
V.02262007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

             COMMISSIONERS OF THE REVENUE CAREER DEVELOPMENT PROGRAM

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

   O. I CERTIFY THAT I MEET THE MINIMUM CRITERIA FOR COR CDP AS ESTABLISHED
      HEREIN.  I CERTIFY I PROVIDE THE FOLLOWING ADDITIONAL SERVICES:

     - I CERTIFY THAT 100% OF ALL WRITTEN APPEALS OF ASSESSMENT FOR REAL
       ESTATE RECEIVED BY MY OFFICE IN THE PAST 12 MONTHS WERE ISSUED A FINAL
       DETERMINATION WITHIN 90 DAYS FROM THE DATE OF RECEIPT OF THE APPEAL.

     - I CERTIFY THAT I HAVE ACCOMPLISHED THE FOLLOWING WITH RESPECT TO THE
       PROCESSING OF STATE INCOME TAX RETURNS:
       * MAINTAIN ACCESS TO THE DEPARTMENT OF TAXATION STATE TAX ACCOUNTING &
         REPORTING SYSTEM (STARS).
       * PROCESS STATE INCOME TAX RETURNS AND ESTIMATED INCOME TAX PAYMENTS AS
         REQURIED PER DEPARTMENT OF TAXATION PROCEDURES PAMPHLET.
       * MET THE DISCLOSURE, SECURITY AND CONFIDENTIALITY REQUIREMENTS AS
         IMPOSED BY THE DEPARTMENT OF TAXATION.

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

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

Option #9, Special Program Certification

Screen 6 of 7



Enter the following information for deputies participating and enrolled in the Deputy Commissioner Program **if the officer is certified. If the officer is not certified do not enter any names.**

- Last Name
- First Name
- Press enter once all names have been entered to update and save your data

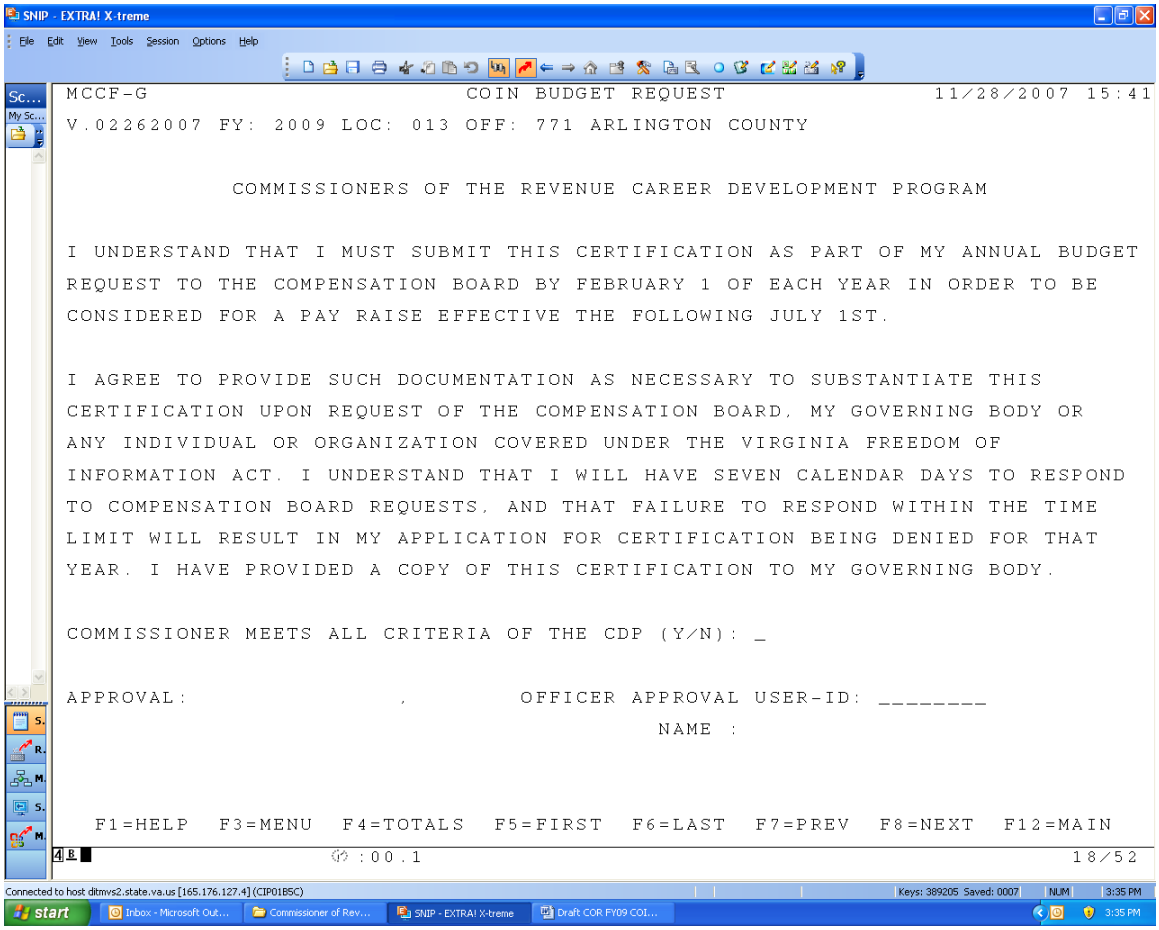
Press 'F8' to proceed with certification

<u>Helpful Hints</u>

- ✓ <u>Enrolled and Participating deputies are not required to be Compensation Board funded or in Compensation Board positions.</u>
- ✓ <u>DO NOT enter the Commissioner's name on this screen; it is for the names of **deputies only**.</u>
- ✓ <u>If the Commissioner is not certified for Career Development, make sure no names are added. This could prevent you from certifying your Special Programs and/or your Budget Request</u>

Option #9, Special Program Certification

Screen 7 of 7



- Enter a 'Y' or 'N' for "Commissioner meets all criteria for CDP".
- Enter the Officer's SCB USERID to certify

Helpful Hints

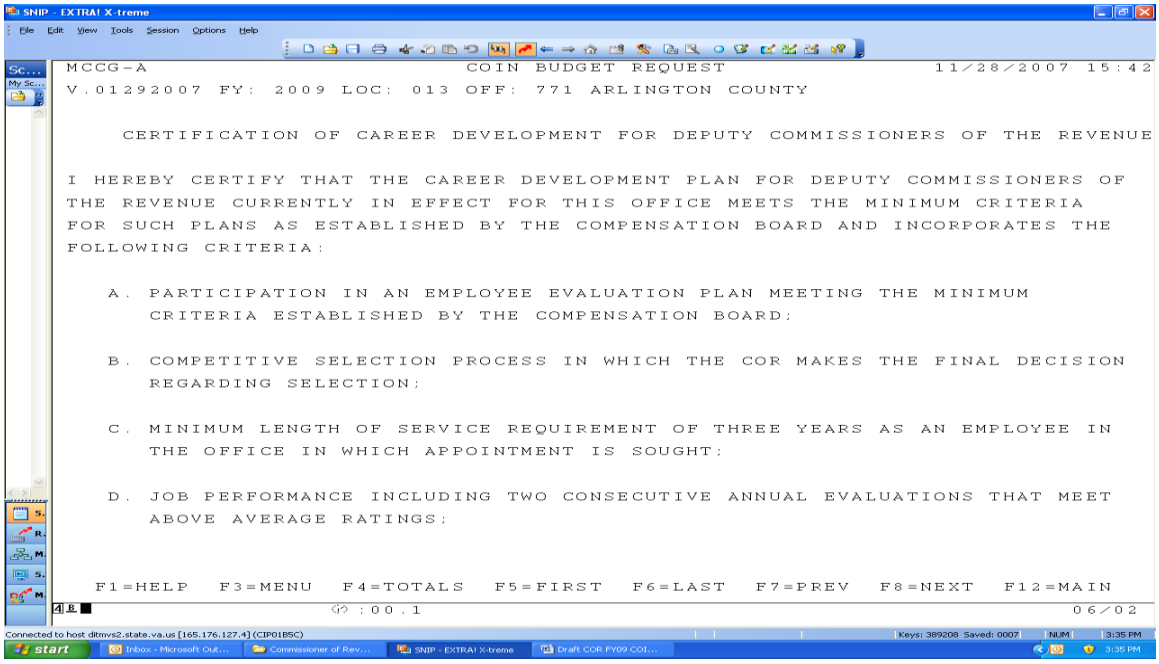
- If the Commissioner is **not certified** you **must** answer "N' to the question "Commissioner meets all criteria of CDP".

Option #9, Special Program Certification

Option #2 Deputy Commissioner of the Revenue Career Development Program

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

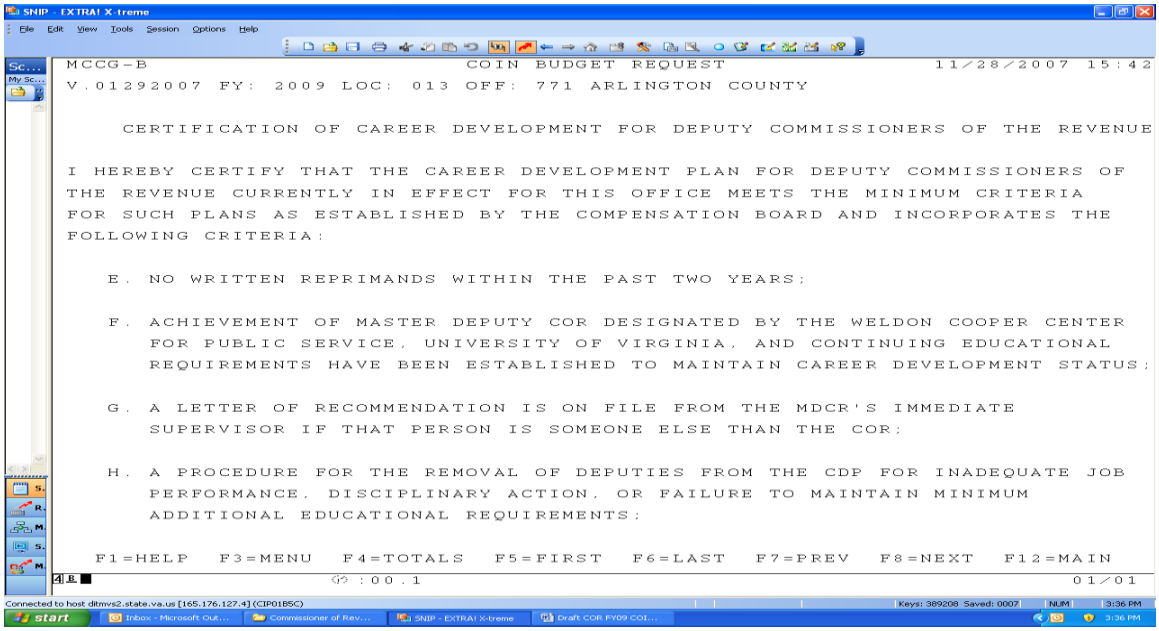
Screen 1 of 5



```
MCCG-A                          COIN BUDGET REQUEST                    11/28/2007 15:42
V.01292007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

     CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY COMMISSIONERS OF THE REVENUE

I HEREBY CERTIFY THAT THE CAREER DEVELOPMENT PLAN FOR DEPUTY COMMISSIONERS OF
THE REVENUE CURRENTLY IN EFFECT FOR THIS OFFICE MEETS THE MINIMUM CRITERIA
FOR SUCH PLANS AS ESTABLISHED BY THE COMPENSATION BOARD AND INCORPORATES THE
FOLLOWING CRITERIA:

   A. PARTICIPATION IN AN EMPLOYEE EVALUATION PLAN MEETING THE MINIMUM
      CRITERIA ESTABLISHED BY THE COMPENSATION BOARD;

   B. COMPETITIVE SELECTION PROCESS IN WHICH THE COR MAKES THE FINAL DECISION
      REGARDING SELECTION;

   C. MINIMUM LENGTH OF SERVICE REQUIREMENT OF THREE YEARS AS AN EMPLOYEE IN
      THE OFFICE IN WHICH APPOINTMENT IS SOUGHT;

   D. JOB PERFORMANCE INCLUDING TWO CONSECUTIVE ANNUAL EVALUATIONS THAT MEET
      ABOVE AVERAGE RATINGS;

  F1=HELP   F3=MENU   F4=TOTALS   F5=FIRST   F6=LAST   F7=PREV   F8=NEXT   F12=MAIN
                                  :00.1                                      06/02
```

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

Screen 2 of 5

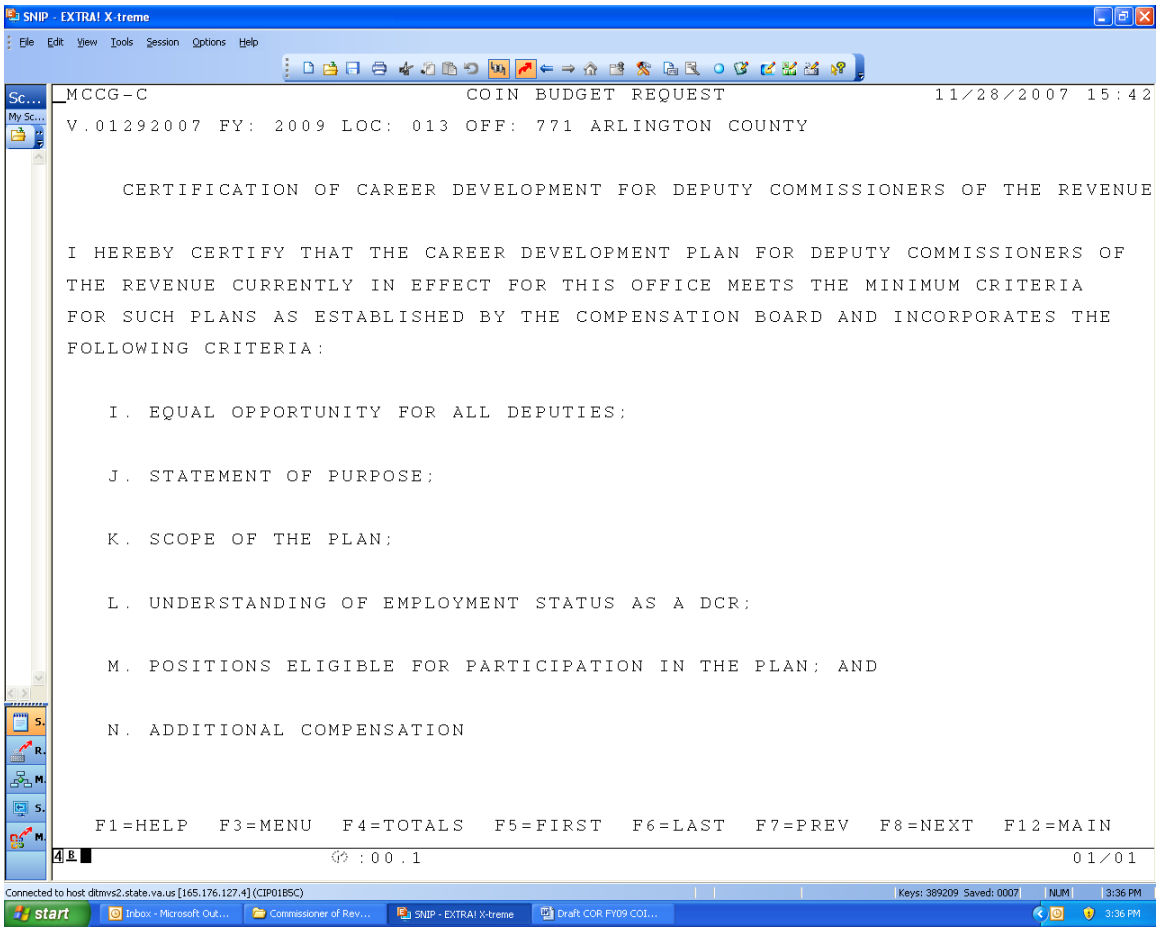


```
MCCG-B                          COIN BUDGET REQUEST                    11/28/2007 15:42
V.01292007 FY: 2009 LOC: 013 OFF: 771 ARLINGTON COUNTY

     CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY COMMISSIONERS OF THE REVENUE

I HEREBY CERTIFY THAT THE CAREER DEVELOPMENT PLAN FOR DEPUTY COMMISSIONERS OF
THE REVENUE CURRENTLY IN EFFECT FOR THIS OFFICE MEETS THE MINIMUM CRITERIA
FOR SUCH PLANS AS ESTABLISHED BY THE COMPENSATION BOARD AND INCORPORATES THE
FOLLOWING CRITERIA:

   E. NO WRITTEN REPRIMANDS WITHIN THE PAST TWO YEARS;

   F. ACHIEVEMENT OF MASTER DEPUTY COR DESIGNATED BY THE WELDON COOPER CENTER
      FOR PUBLIC SERVICE, UNIVERSITY OF VIRGINIA, AND CONTINUING EDUCATIONAL
      REQUIREMENTS HAVE BEEN ESTABLISHED TO MAINTAIN CAREER DEVELOPMENT STATUS;

   G. A LETTER OF RECOMMENDATION IS ON FILE FROM THE MDCR'S IMMEDIATE
      SUPERVISOR IF THAT PERSON IS SOMEONE ELSE THAN THE COR;

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

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

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

Option #9, Special Program Certification

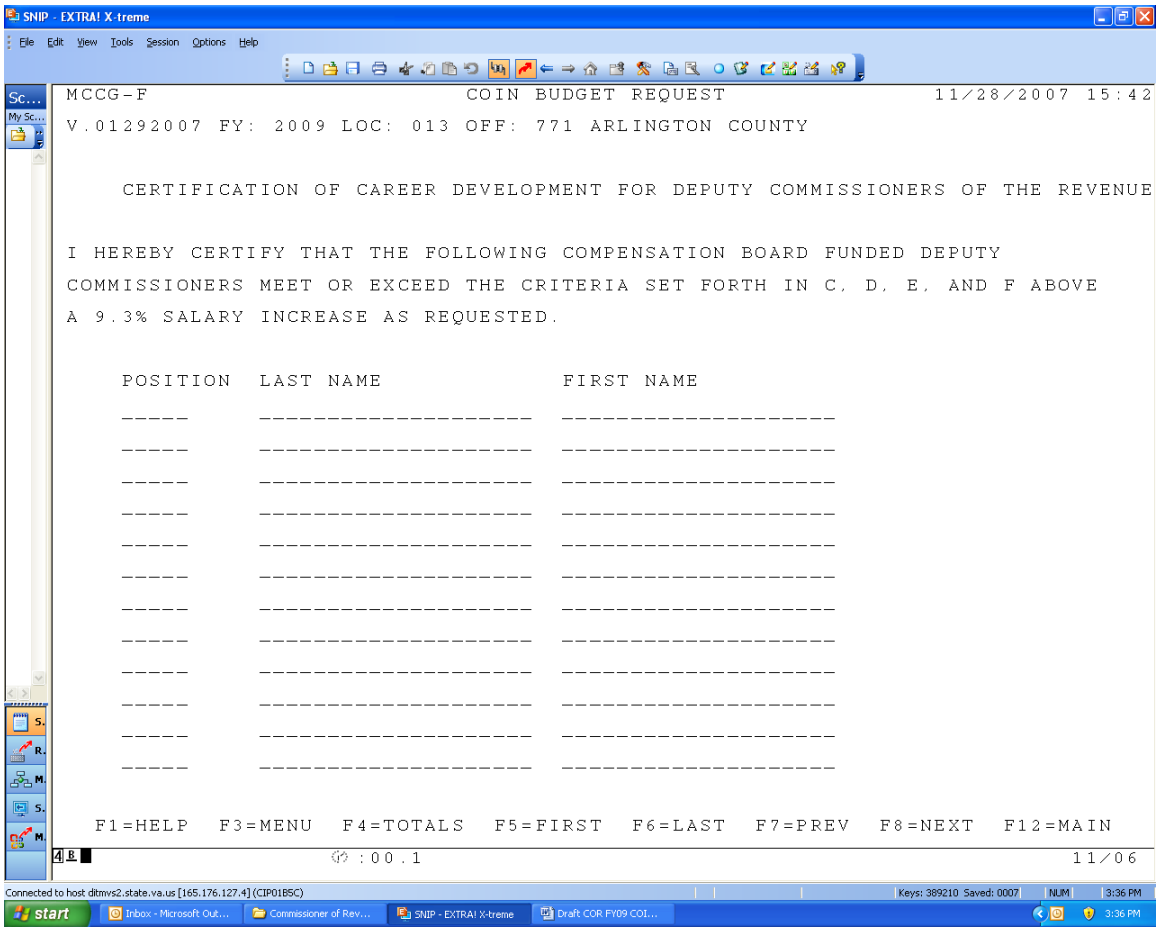
Screen 3 of 5



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

Option #9, Special Program Certification

Screen 4 of 5



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

- Position Number

Last and First Name will populate the blank next to position number based on the Current Information contained in COIN's Permanent Personnel tables once you hit 'ENTER' to process.

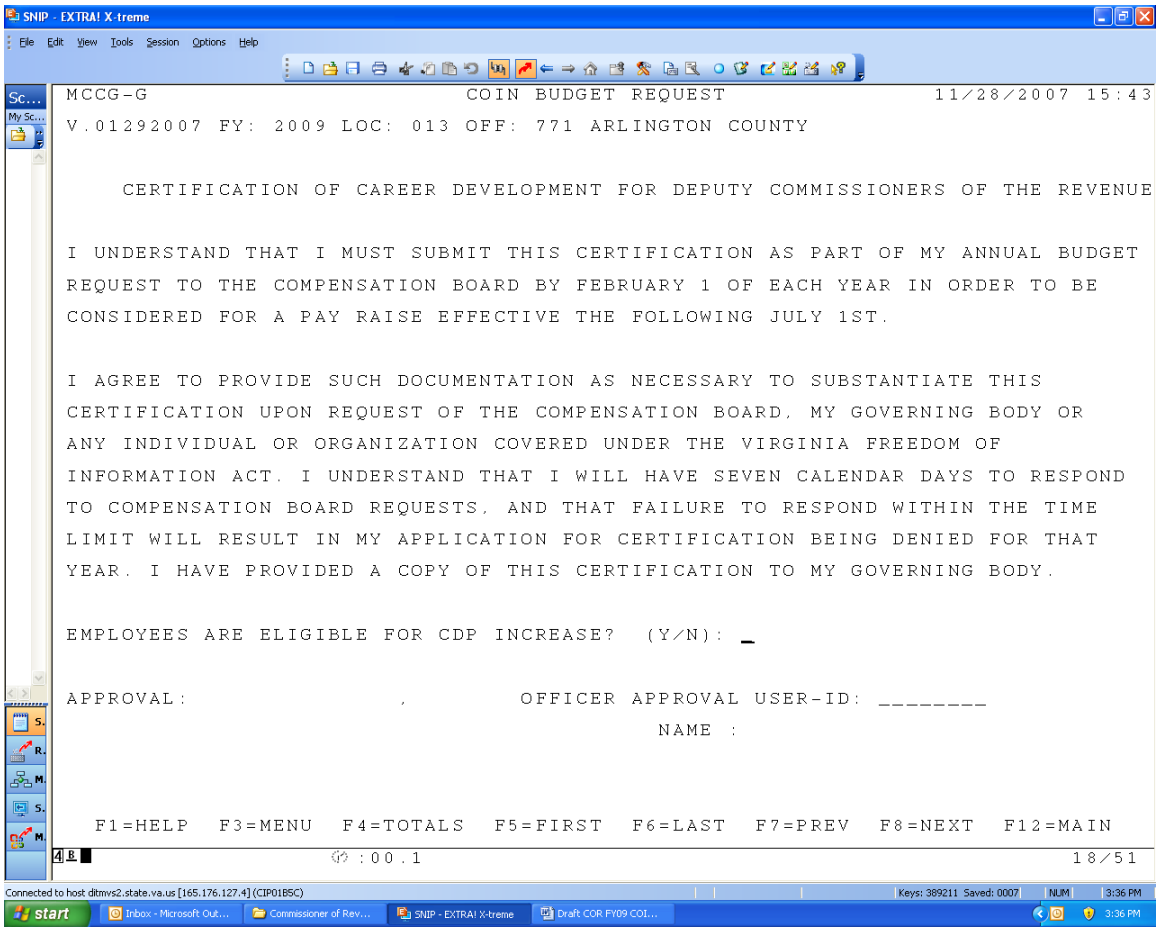
Press 'F8' to proceed to the next page

<u>Helpful Hints</u>

- Only certified deputies should be on this page.
- This page **is not** for deputies that are simply participating and enrolled.
- Certified deputies who are currently in UNFUNDED positions are still included
- If your office does not have any certified and eligible deputies, make sure there are no names appearing on this screen. It could prevent you from certifying your Special Programs and/or your Budget Request

Option #9, Special Program Certification

Screen 5 of 5



Enter a 'Y' or 'N' for "Deputy is eligible for the CDP increase"

- Only use 'N' if you have no eligible deputies
- Enter the Officer's SCB USERID to certify
- Press 'Enter' to update and save your data.

12. Option #10 - Certify Budget Request

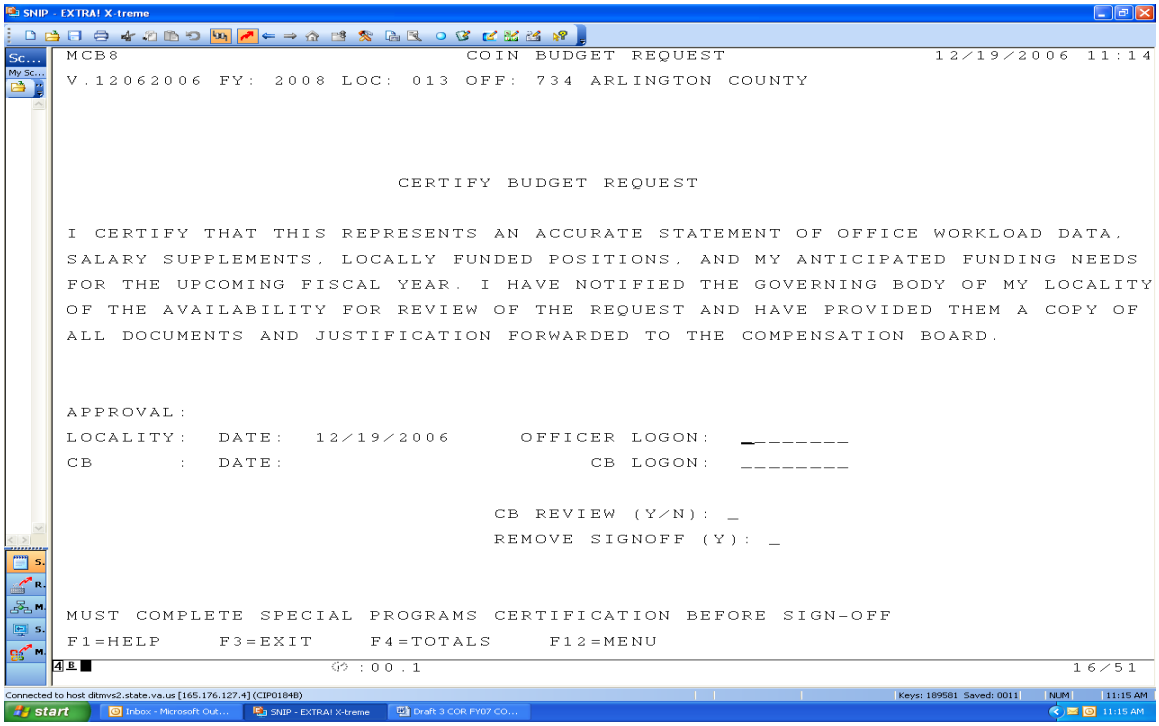
Purpose:

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

Navigational Path:

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

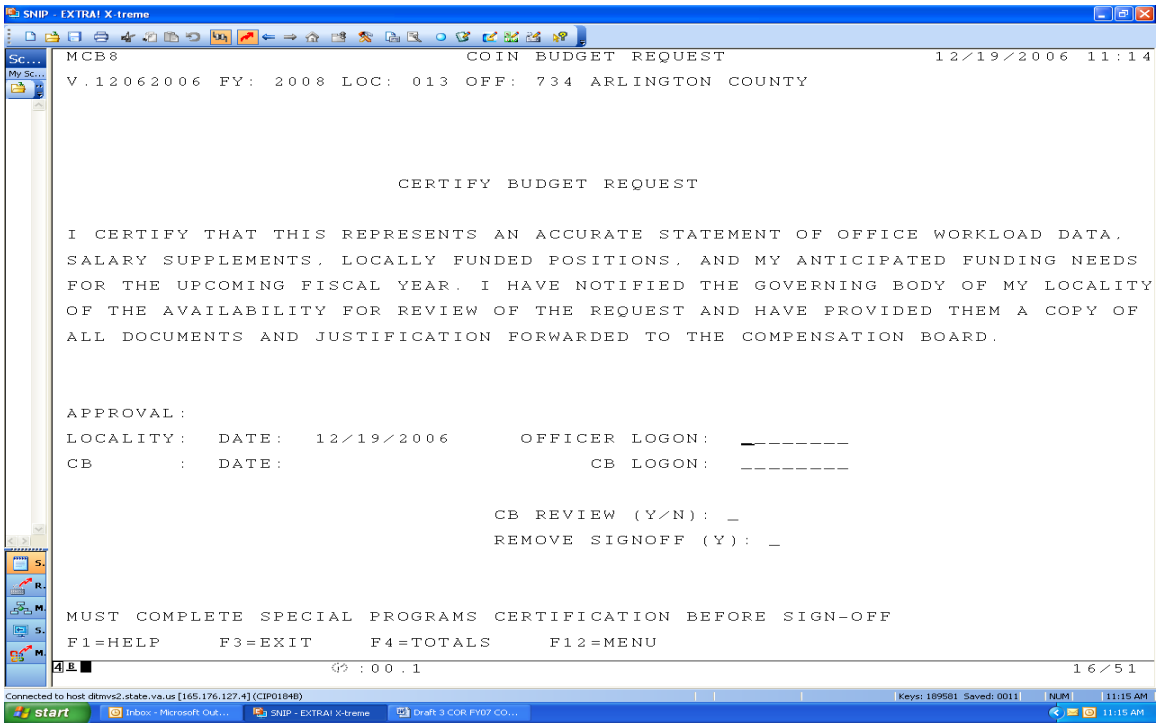
COMMISSONERS OF THE REVENUE



Helpful Hints:

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

Option #10, Certify Budget Request



Helpful Hints (Continued):

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

Procedures:

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

13. Option #11, Comments

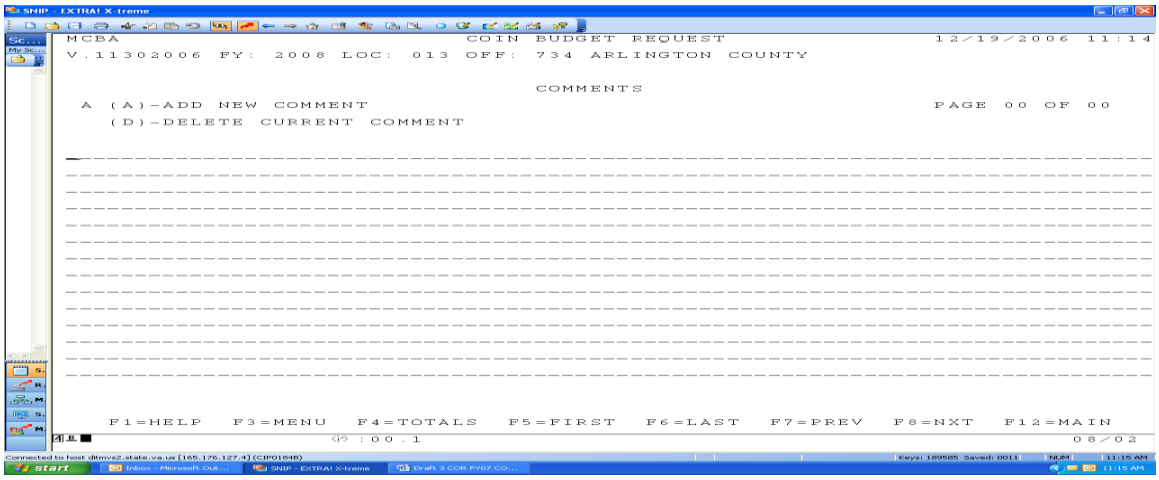
PURPOSE:

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

NAVIGATIONAL PATH:

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

COMMISSONER's OF THE REVENUE



HELPFUL HINTS:

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

PROCEDURES:

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

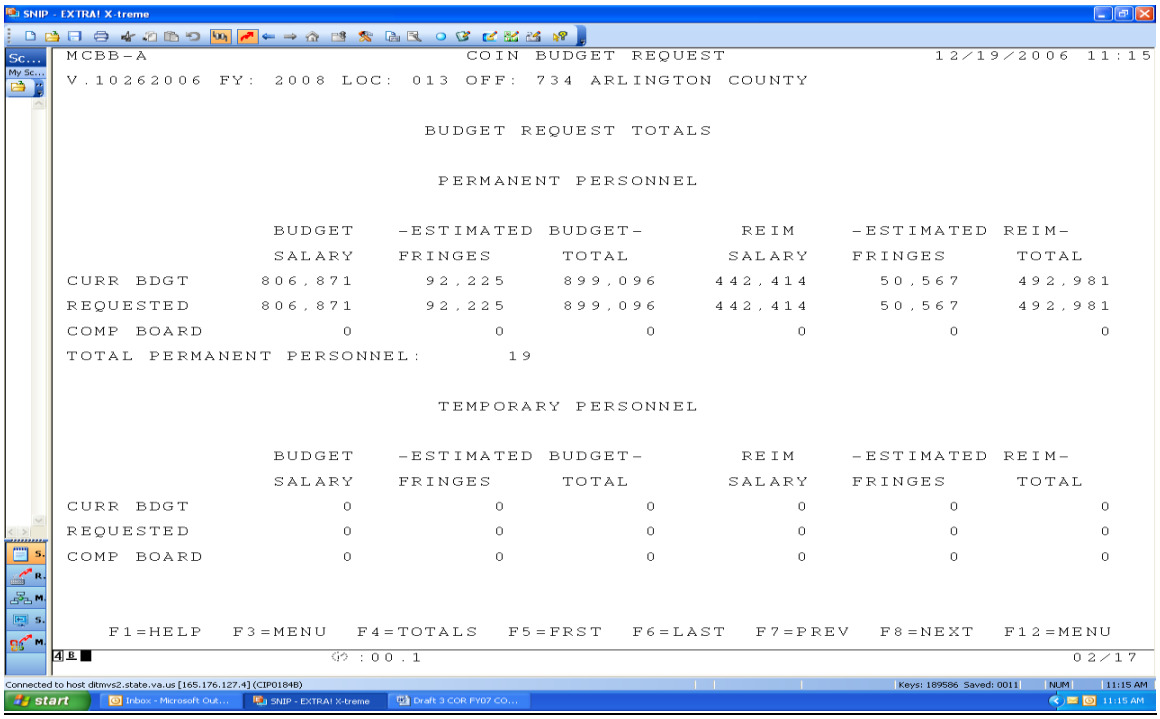
14. Function Key 'F4' - Budget Request Totals

PURPOSE:

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

NAVIGATIONAL PATH:

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



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

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

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

                               TEMPORARY PERSONNEL

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

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

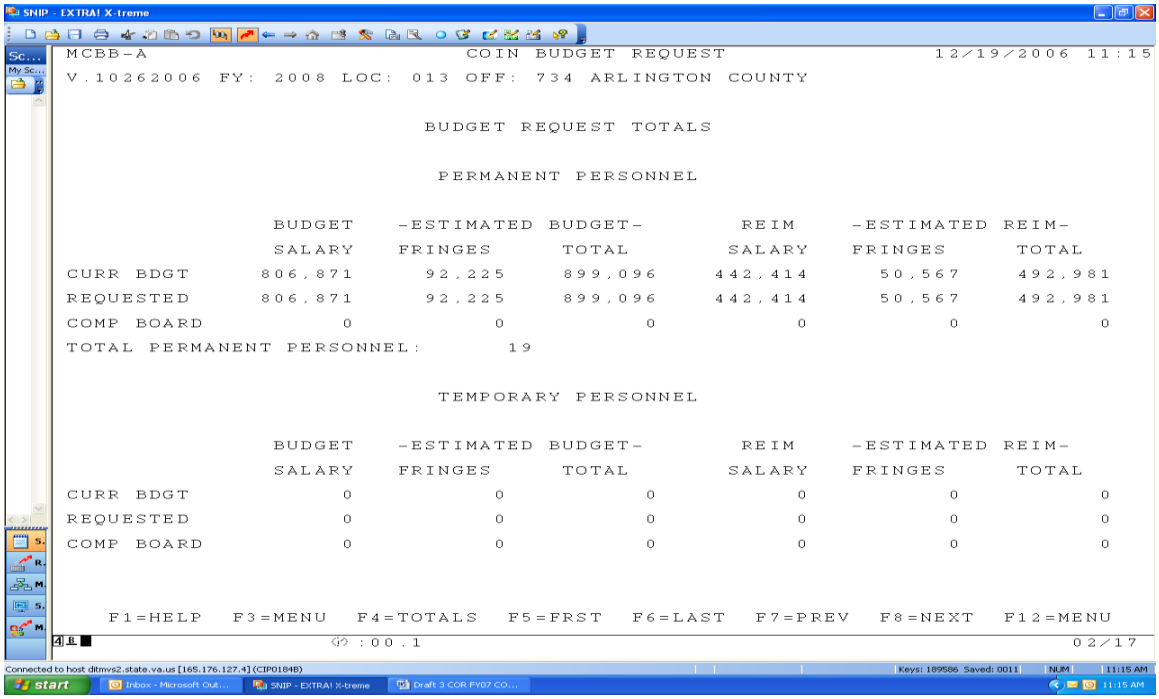
HELPFUL HINTS:

- 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

COMMISSONERS OF THE REVENUE

1ST SCREEN OF 3:



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

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

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

                               TEMPORARY PERSONNEL

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

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

COMMISSONERS OF THE REVENUE

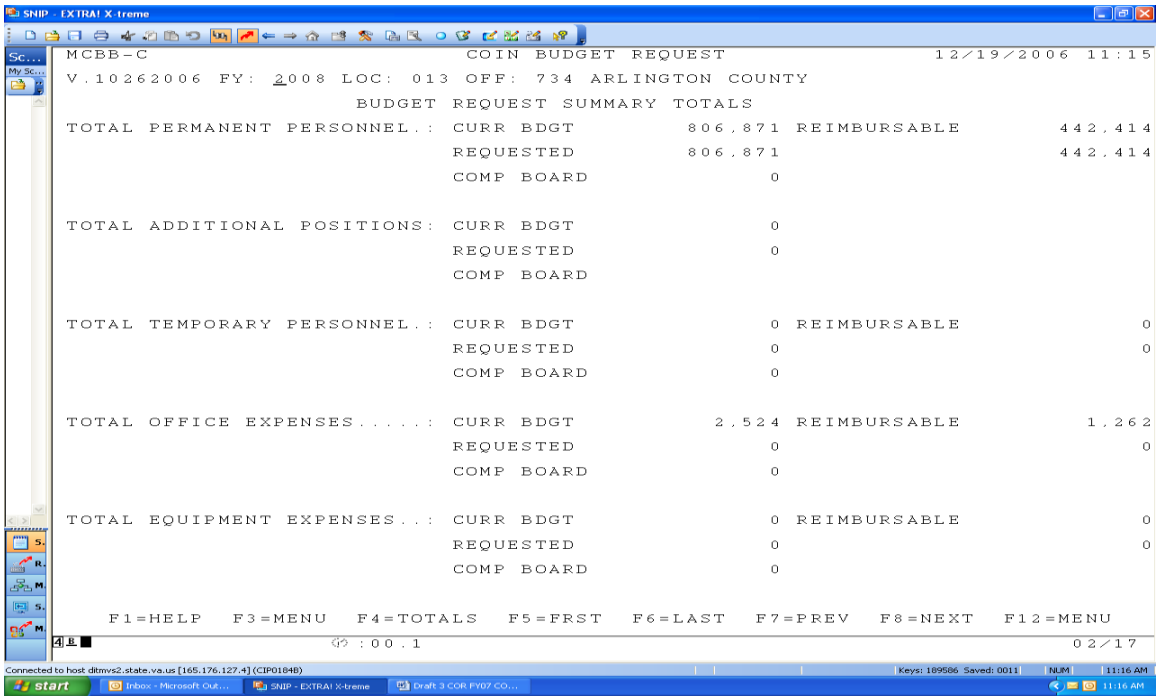
2ND SCREEN OF 3:

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

'F4' Budget Request Totals

COMMISSONERS OF THE REVENUE

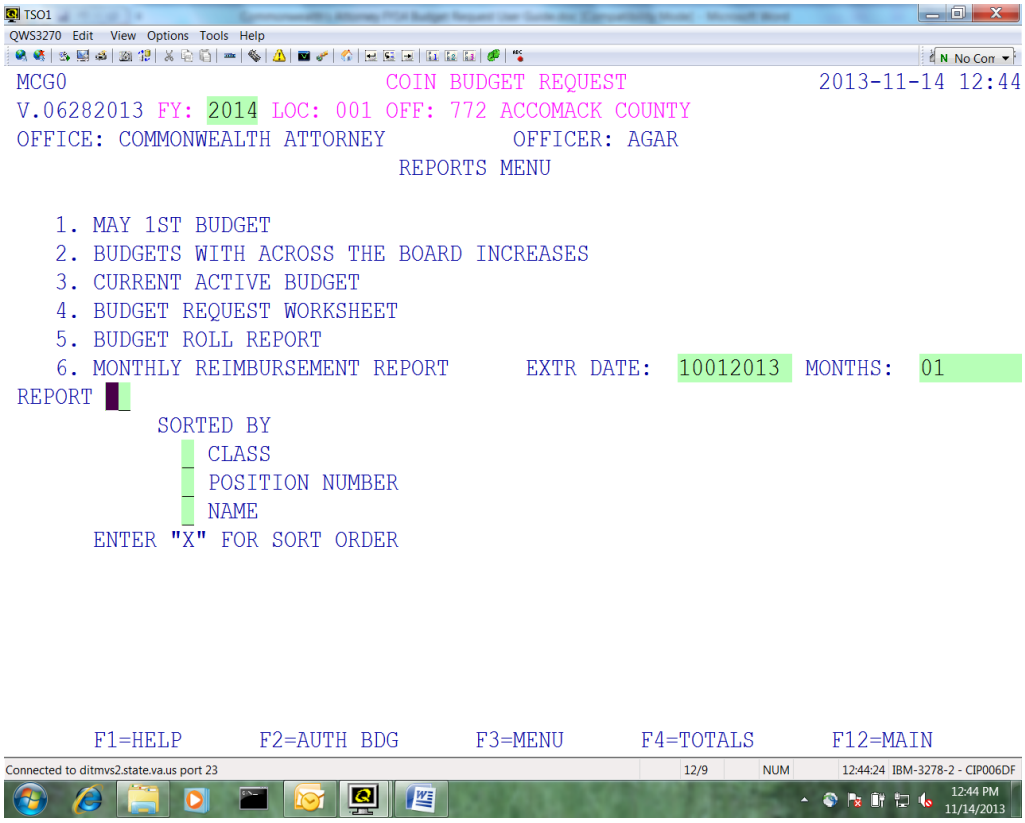
3RD SCREEN OF 3:



```
MCBB-C                          COIN BUDGET REQUEST                    12/19/2006  11:15
V.10262006 FY: 2008 LOC: 013 OFF: 734 ARLINGTON COUNTY
                          BUDGET REQUEST SUMMARY TOTALS
TOTAL PERMANENT PERSONNEL.: CURR BDGT          806,871 REIMBURSABLE          442,414
                            REQUESTED          806,871                       442,414
                            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            2,524 REIMBURSABLE            1,262
                            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
```

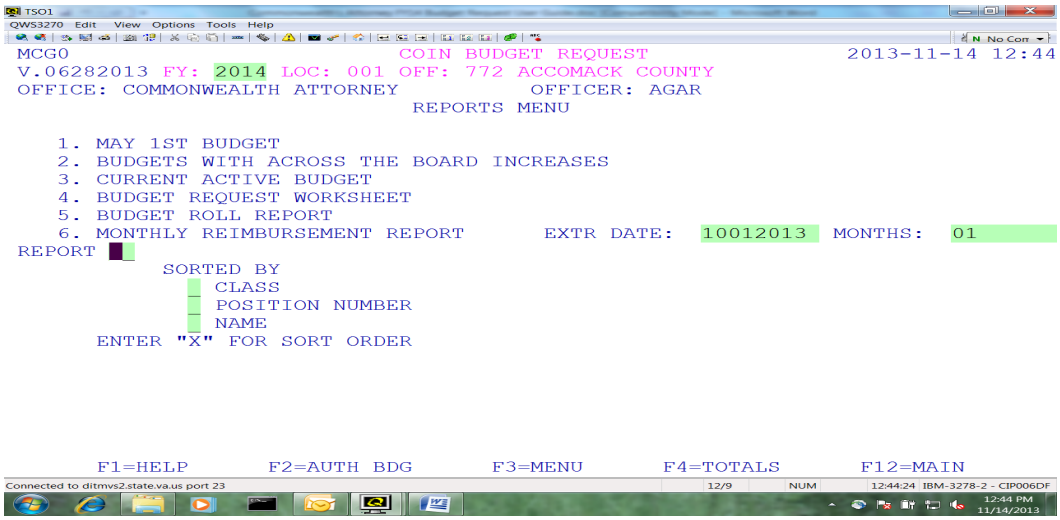
- **3RD SCREEN OF 3:**
  - ✓ Displays totals for each budget request broad-based category:
    - Permanent Personnel
    - Additional Positions
    - Temporary Personnel Funding
    - Office Expense Funding
    - Equipment Requests
  - ✓ **'CURR BDGT'** – This line of information refers to the 'base'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

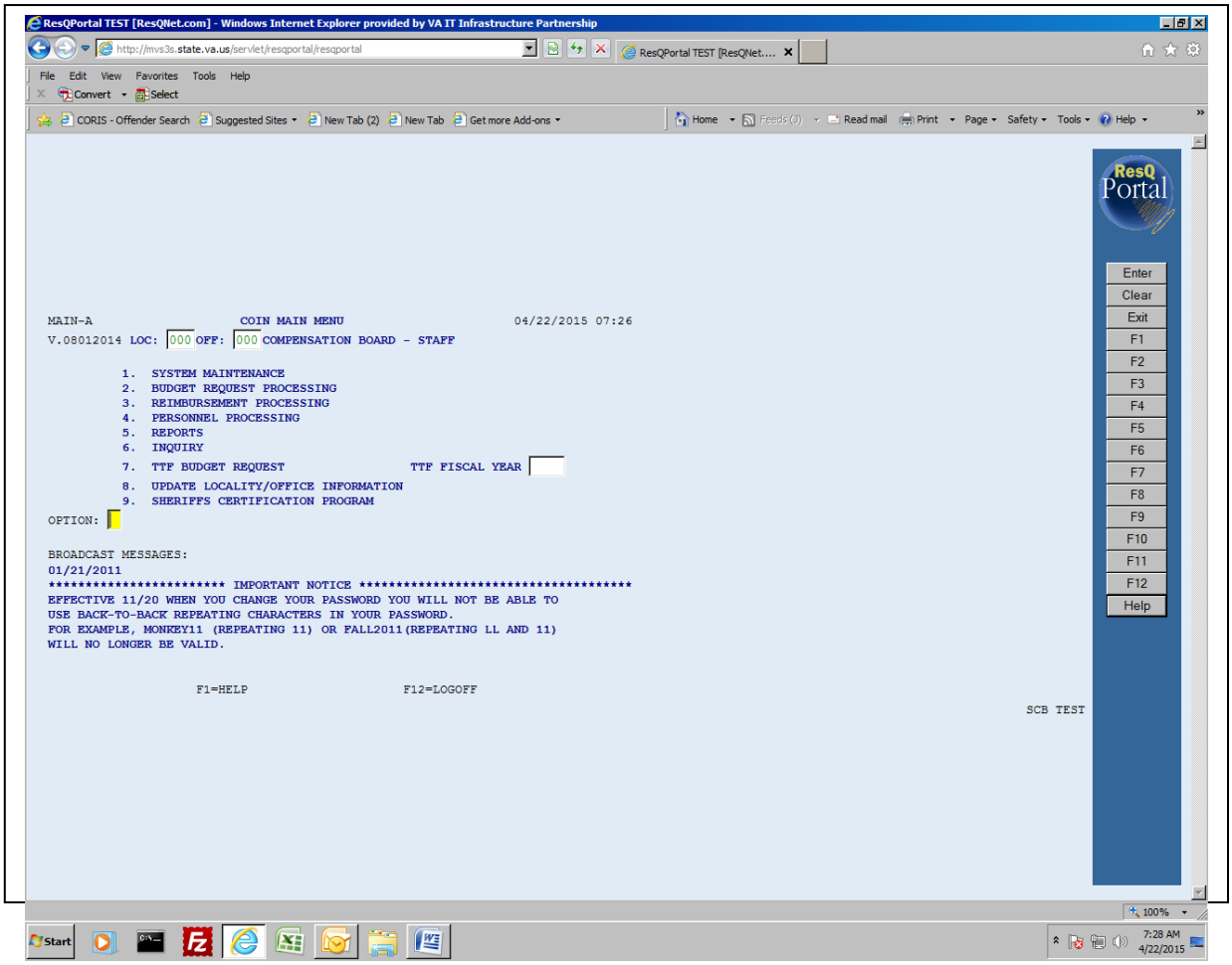
1. Change the 'FY' to the new fiscal year or fiscal year desired
2. Enter the desired Budget Report option

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

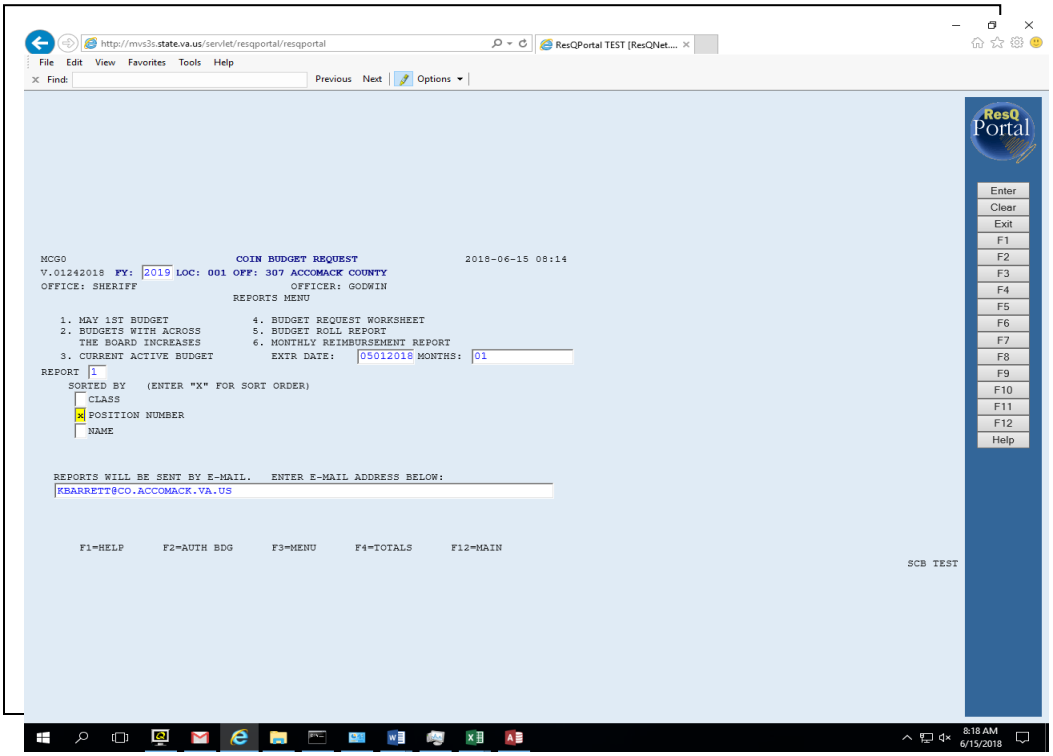
Downloading Budget Reports from COIN

Generating Reports in COIN



- Navigate to the COIN Main Menu; from the Main Menu, select option 5 (Reports) and press the 'Enter' key.

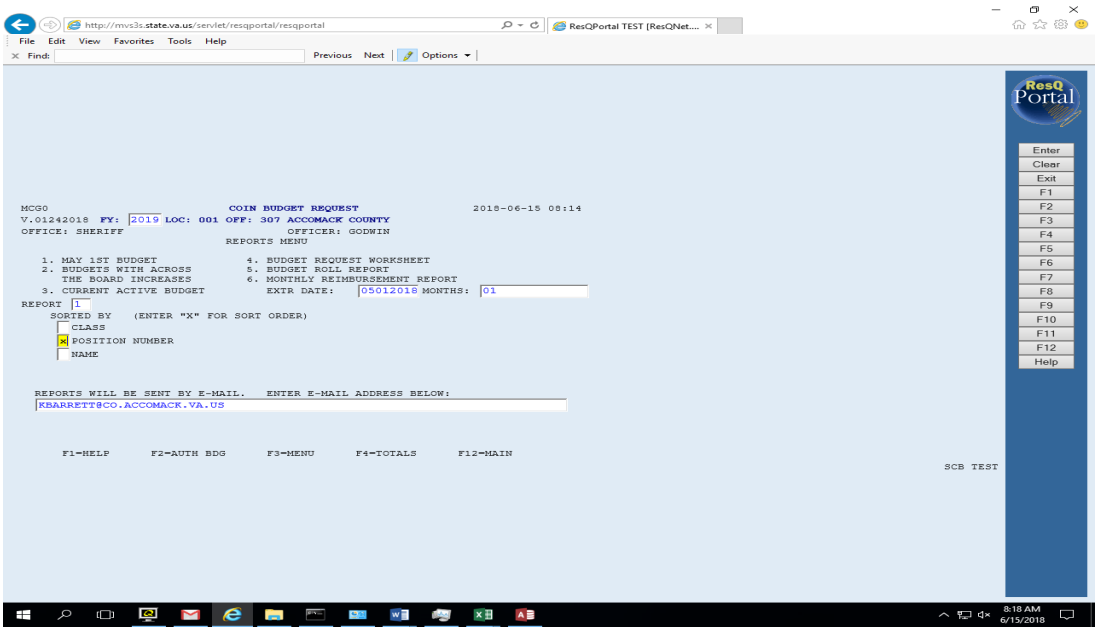
Main Menu Option #5 – Reports



There are 6 reports that are available:

- **Option #1 "May 1st Budget"**- This is the Budget as typically approved by the Compensation Board during its April board meeting (note, the FY20 budget was approved at the June board meeting). This is the basis for the budget effective July 1 of that year. Note: Be sure to change **FY** at the top of the screen for the Budget "**ending"** year (2020).
- **Option #2 "Budget Report with Across the Board Increases Increase"**- This report lists current positions and the salary increase, if any, as provided by the Appropriation Act. This report is available **<u>one month prior</u>** to the effective date of the salary increase.
- **Option #3 "Current Active Budget"**– This is the historical budget report, listing all changes to your budget since it went into effect.
- **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 Report"** – This is the Budget as it went into effect on July 1. This could differ from the May 1st Budget.
- **Option #6 "Monthly Reimbursement Report"** – This reports list all line items for a specified month's reimbursement.

Main Menu Option #5 – Reports



- Change the Fiscal Year to 2020 (FY20 Approved Budget Report)
- Enter the report option (1-6)
- Enter the desired sort sequence, if no sort sequence is specified, the Budget Report will be printed in Class Code order.
- Change the default email address to the specific email address of the individual to receive the report

Governing Bodies have the ability to request a Budget Report for each office type in their locality by entering the office code on the COIN Main Menu, proceed to option 5 (reports) for each specific office type, and then follow the instructions above (307-Sheriffs/Superintendents; 717-Directors of Finance; 771-Commissioners of the Revenue; 772-Commonwealth's Attorneys; 773-Circuit Court Clerks; 774-Treasurers).

Technical Assistance

Users with **Google-hosted email** may experience problems with receiving a file attachment in the email received from the COIN system. Instead, users with Google-hosted email may receive the budget report loaded into the body of the email. If you experience this problem (report contained in body of email and no file attachment received), please email one of the individuals listed below and notify them that you have experienced this specific problem. Please be sure to include your Locality number and your Office number in your email request so that we may assist you in receiving the budget report in a file attachment.

Dan Munson – dan.munson@scb.virginia.gov (All Offices)
Paige Christy – paige.christy@scb.virginia.gov (Comm Attys and Clerks)
Andy Waller – andy.waller@scb.virginia.gov (Treasurers, Commissioners, Fin Directors)
Bill Fussell – william.fussell@scb.virginia.gov (Sheriffs and Reg Jails)
Charlene Rollins – charlene.rollins@scb.virginia.gov (All Offices)

17. Appendix

Classifications And Pay Plans

CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE COMMISSIONER OF THE REVENUE
JULY 1, 2019 - JUNE 30, 2020

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
GENERAL OFFICE CLERK CLERK TYPIST	GC, MGC CT, MCT	1	Administrative	21,916	41,248
TAX EXAMINER I DEPUTY I SECRETARY I	TEI, MTEI DI, MDI SECI, MSECI				
DEPUTY II SECRETARY II	DII, MDII SECII, MSECII	2	Sr. Administrative	26,185	50,405
MAPPING TECHNICIAN	MT, MMT				
DEPUTY III ADMINISTRATIVE ASSISTANT	DIII, MDIII AA, MAA	4	Professional	31,305	64,373
DEPUTY IV	DIV, MDIV				
CHIEF DEPUTY I	CDI, MCDI	7	Sr. Professional	37,401	84,076
CHIEF DEPUTY II	CDII, MCDII				
CHIEF DEPUTY III	CDIII, MCD3	8	Supervisory/ Management	48,630	128,417
CHIEF DEPUTY IV	CDIV, MCDIV				

M - denotes participation in Deputy Commissioners Career Development Program

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