Constitutional Officer Information Network

C•IN

Budget Request Guide

Circuit Court Clerks

Compensation Board
December 1, 2020

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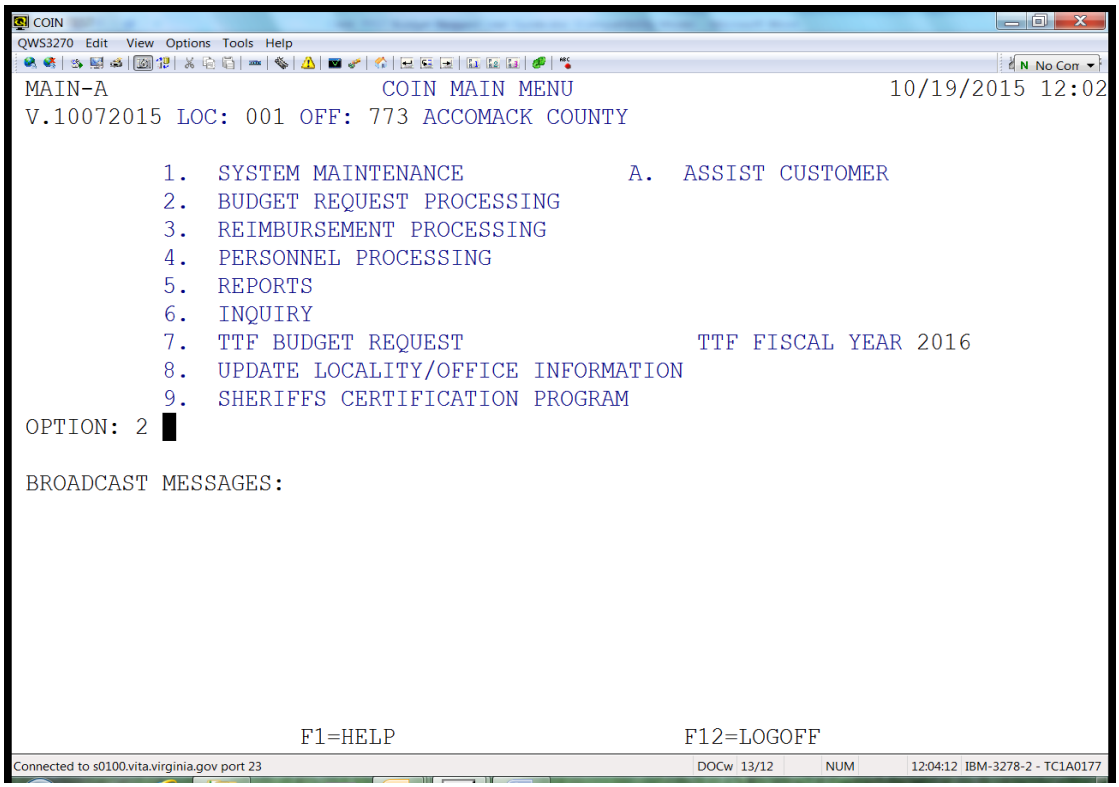
Table of Contents

1. COIN MAIN MENU 1
2. Main Menu - Option #2, Budget Request (OLB) Menu 2
3. Option #1, Permanent Personnel.....4
4. Option #2, Additional Personnel Request.....7
5. Option #3, Temporary Personnel Fund Request 9
6. Option #4, Fully Or Partially Funded Personnel 11
7. Option #5, Office Expense Funding Request.....14
8. Option #7, Record Workload Information 16
9. Option #8 – Update Locality Information 22
10. Option #9 – Special Program Certification……..…….26
11. Option #10 - Certify Budget Request.....35
12. Option #11, Comments 37
13. Function Key 'F4' - Budget Request Totals 38
14. Main Menu Option #5 Budget Reports 42
15. Download Instructions.....44
16. Appendix……48

1. COIN MAIN MENU



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

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

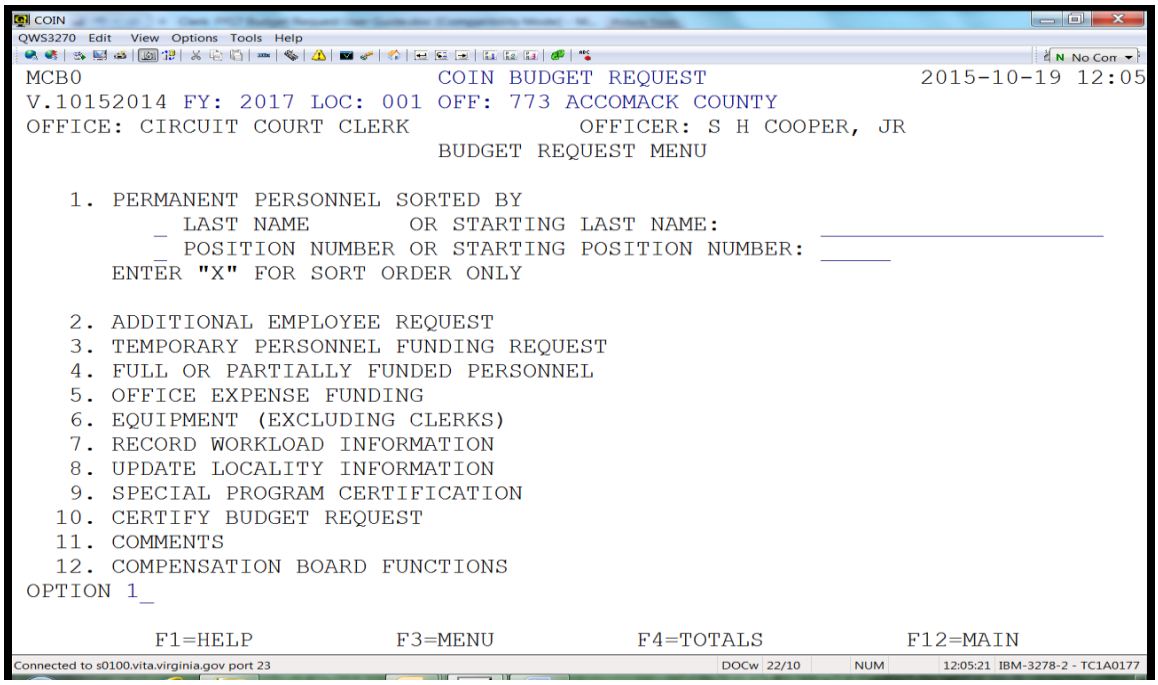
Purpose:

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

Navigational Path

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

CLERK'S



```
MCB0                          COIN BUDGET REQUEST                2015-10-19 12:05
V.10152014 FY: 2017 LOC: 001 OFF: 773 ACCOMACK COUNTY
OFFICE: CIRCUIT COURT CLERK            OFFICER: S H COOPER, JR
                              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

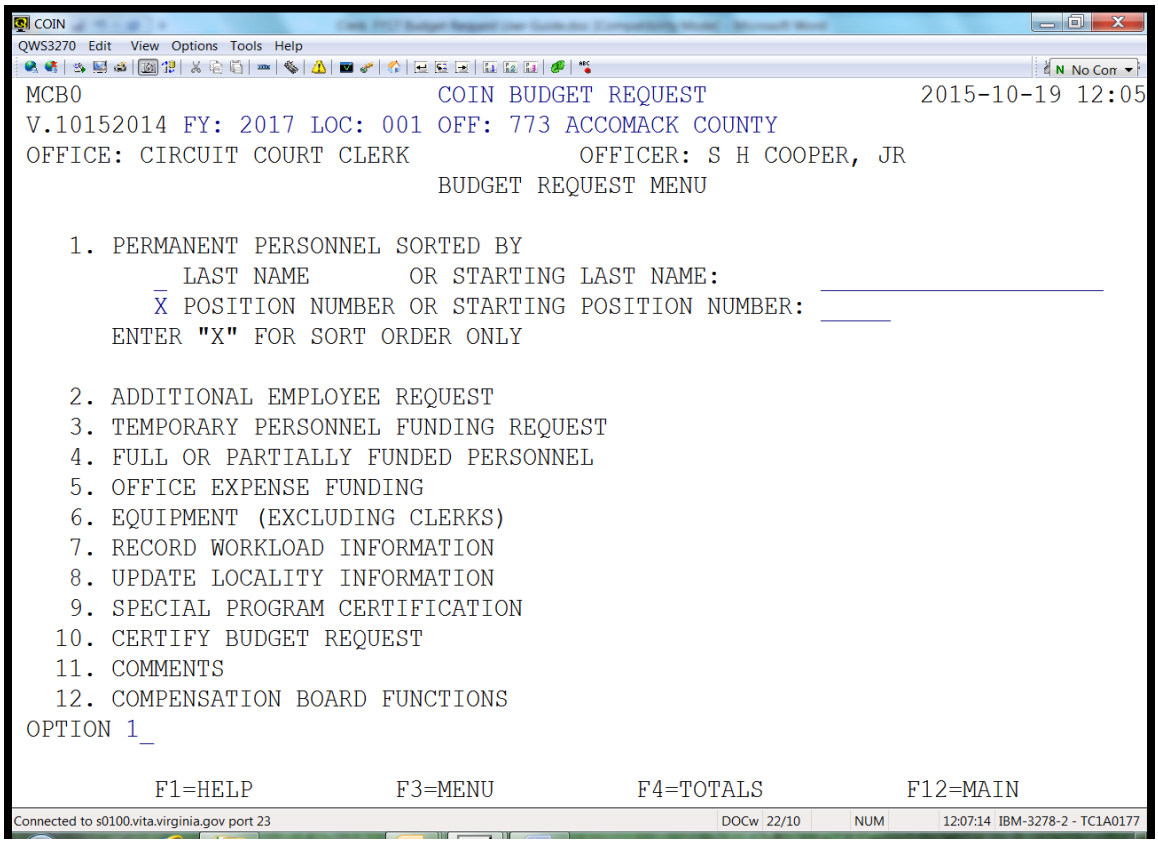
   2. ADDITIONAL EMPLOYEE REQUEST
   3. TEMPORARY PERSONNEL FUNDING REQUEST
   4. FULL OR PARTIALLY FUNDED PERSONNEL
   5. OFFICE EXPENSE FUNDING
   6. EQUIPMENT (EXCLUDING CLERKS)
   7. RECORD WORKLOAD INFORMATION
   8. UPDATE LOCALITY INFORMATION
   9. SPECIAL PROGRAM CERTIFICATION
  10. CERTIFY BUDGET REQUEST
  11. COMMENTS
  12. COMPENSATION BOARD FUNCTIONS
OPTION 1_

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

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

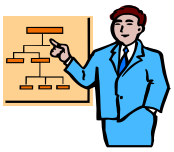


Helpful Hints (Continued):

- 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

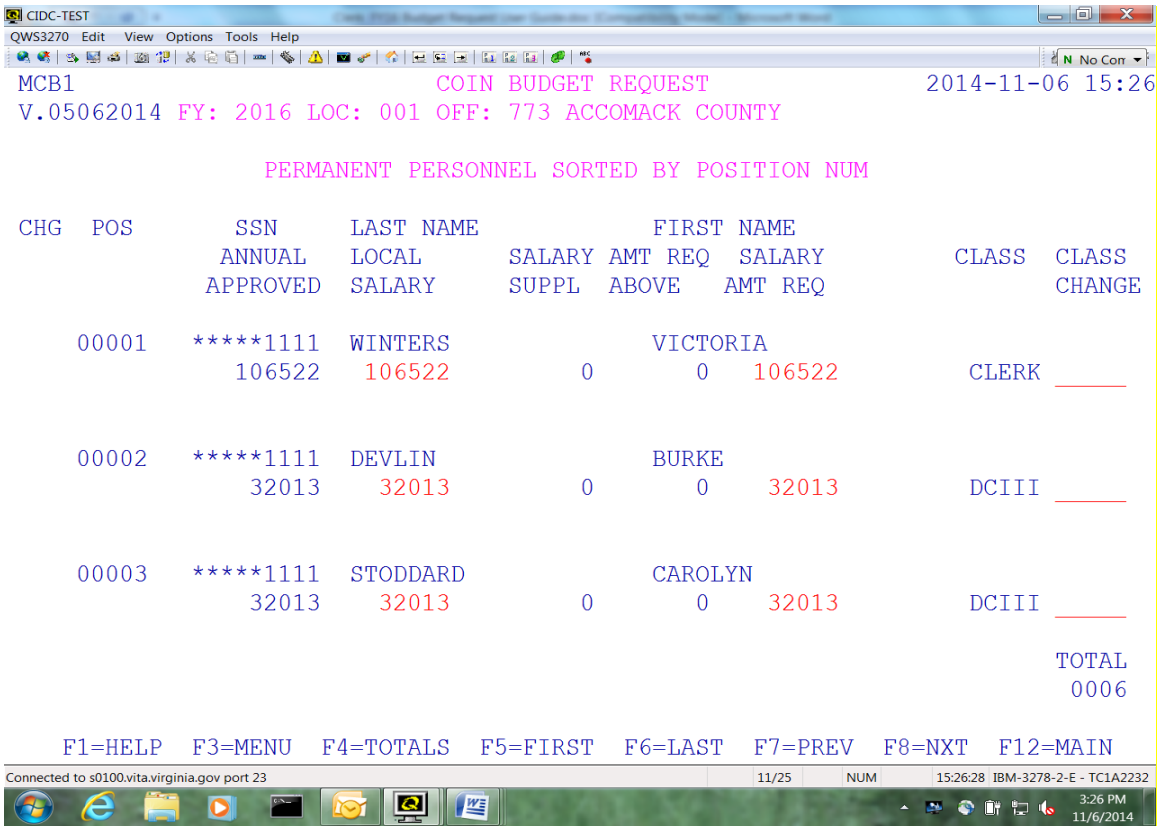
Purpose:

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

CLERK'S



```
MCB1                          COIN BUDGET REQUEST                2014-11-06 15:26
V.05062014 FY: 2016 LOC: 001 OFF: 773 ACCOMACK COUNTY

                 PERMANENT PERSONNEL SORTED BY POSITION NUM

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

    00001   *****1111   WINTERS              VICTORIA
               106522    106522         0       0   106522          CLERK _____

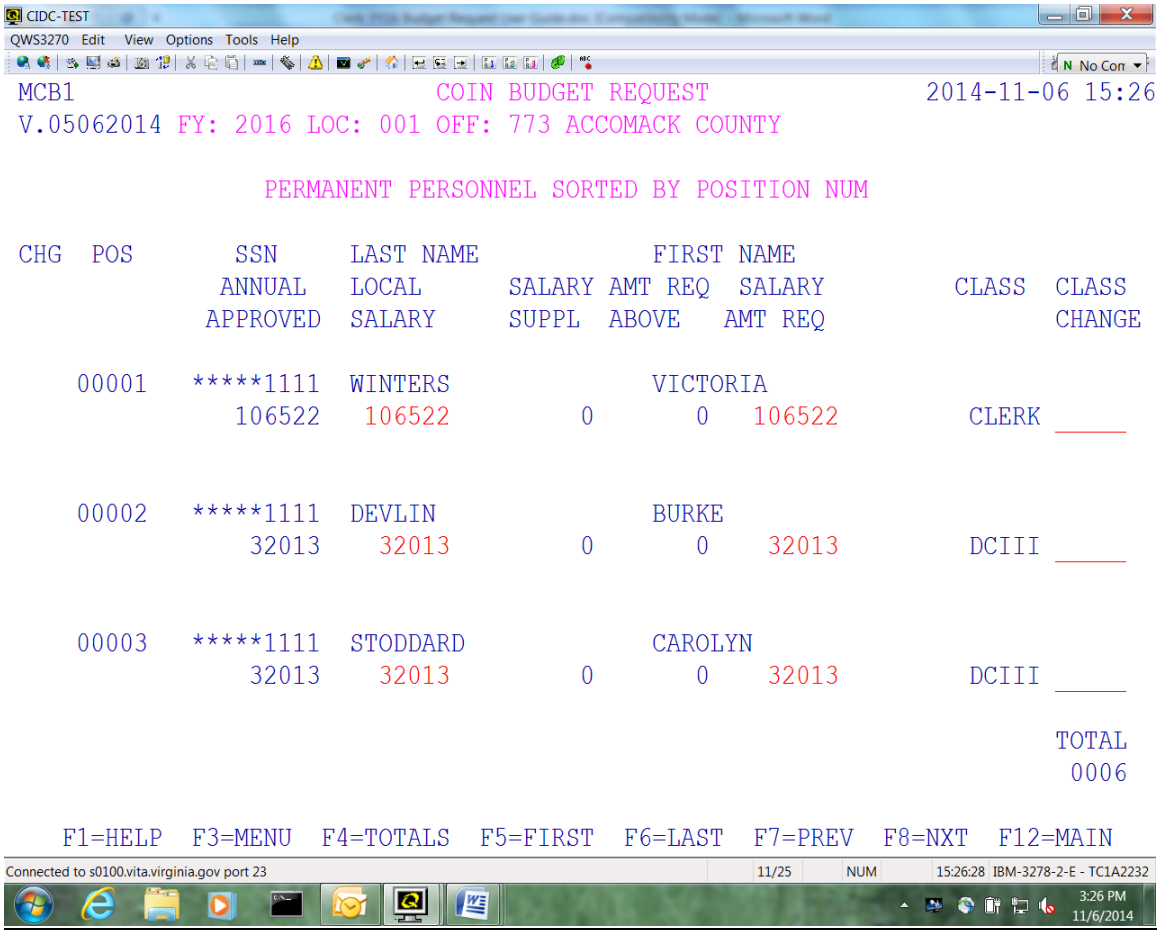
    00002   *****1111   DEVLIN               BURKE
                32013     32013         0       0    32013          DCIII _____

    00003   *****1111   STODDARD             CAROLYN
                32013     32013         0       0    32013          DCIII _____

                                                                     TOTAL
                                                                      0006

   F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
```

Option #1, Permanent Personnel



```
CIDC-TEST
QWS3270  Edit  View  Options  Tools  Help
MCB1                          COIN BUDGET REQUEST                2014-11-06 15:26
V.05062014 FY: 2016 LOC: 001 OFF: 773 ACCOMACK COUNTY

                 PERMANENT PERSONNEL SORTED BY POSITION NUM

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

    00001   *****1111   WINTERS              VICTORIA
               106522    106522         0       0   106522          CLERK  _____

    00002   *****1111   DEVLIN               BURKE
                32013     32013         0       0    32013          DCIII  _____

    00003   *****1111   STODDARD             CAROLYN
                32013     32013         0       0    32013          DCIII  _____

                                                                          TOTAL
                                                                           0006

   F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
Connected to s0100.vita.virginia.gov port 23   11/25   NUM   15:26:28  IBM-3278-2-E - TC1A2232
                                                                        3:26 PM
                                                                        11/6/2014
```

Helpful Hints:

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

Option #1, Permanent Personnel

```
CIDC-TEST
QWS3270  Edit  View  Options  Tools  Help
MCB1                          COIN BUDGET REQUEST                2014-11-06 15:26
V.05062014 FY: 2016 LOC: 001 OFF: 773 ACCOMACK COUNTY

                 PERMANENT PERSONNEL SORTED BY POSITION NUM

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

    00001   *****1111   WINTERS              VICTORIA
               106522    106522         0       0   106522          CLERK _____

    00002   *****1111   DEVLIN               BURKE
                32013     32013         0       0    32013          DCIII _____

    00003   *****1111   STODDARD             CAROLYN
                32013     32013         0       0    32013          DCIII _____

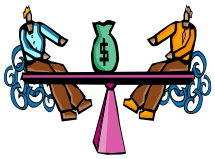
                                                                     TOTAL
                                                                      0006

   F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NXT  F12=MAIN
Connected to s0100.vita.virginia.gov port 23   11/25   NUM   15:26:28 IBM-3278-2-E - TC1A2232
                                                                  3:26 PM
                                                                  11/6/2014
```

PROCEDURES:

Annual Approved:	Supplied by CB (Can be changed by CB)
Local Salary:	Enter the total salary for each position including locality supplement if applicable. If no local supplement funded press the "Enter" key and the CB Annual Approved Salary will be used.
Salary Suppl:	Calculated for you = Total Locality amount minus the Compensation Board Approved Salary gives you the salary Supplement
Amt Req Above:	Calculated for you = Salary Amount Requested – Annual Salary gives you amount requested above
Sal Amt Req:	Entered by Officer or Compensation Board
Class:	Supplied by system
Class Change:	Enter the class you are requesting for a salary alignment for the employee currently in this position.

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



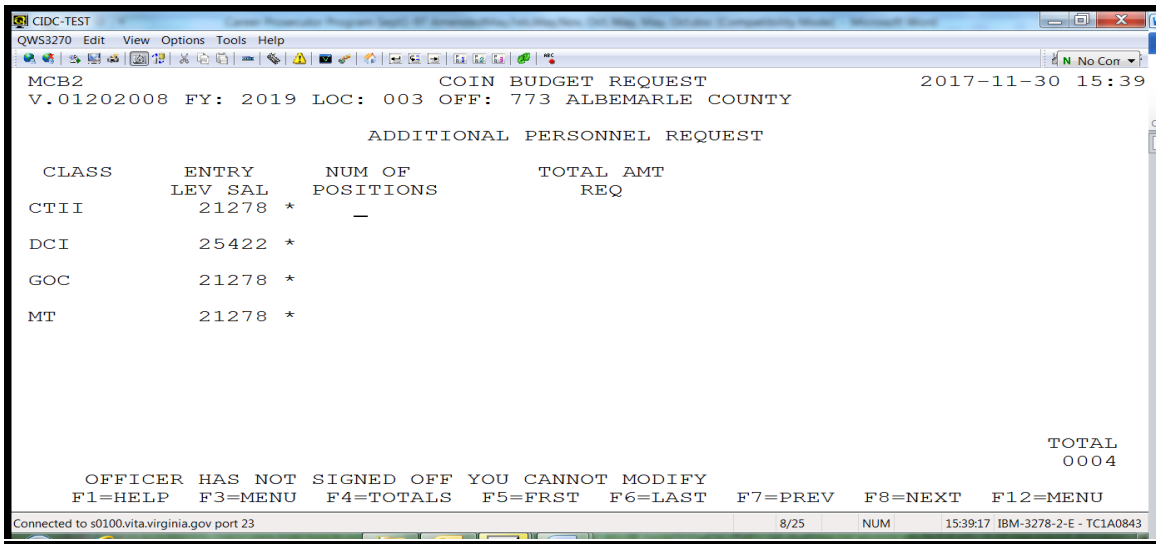
4. Option #2, Additional Personnel Request

Purpose:

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

Navigational Path:

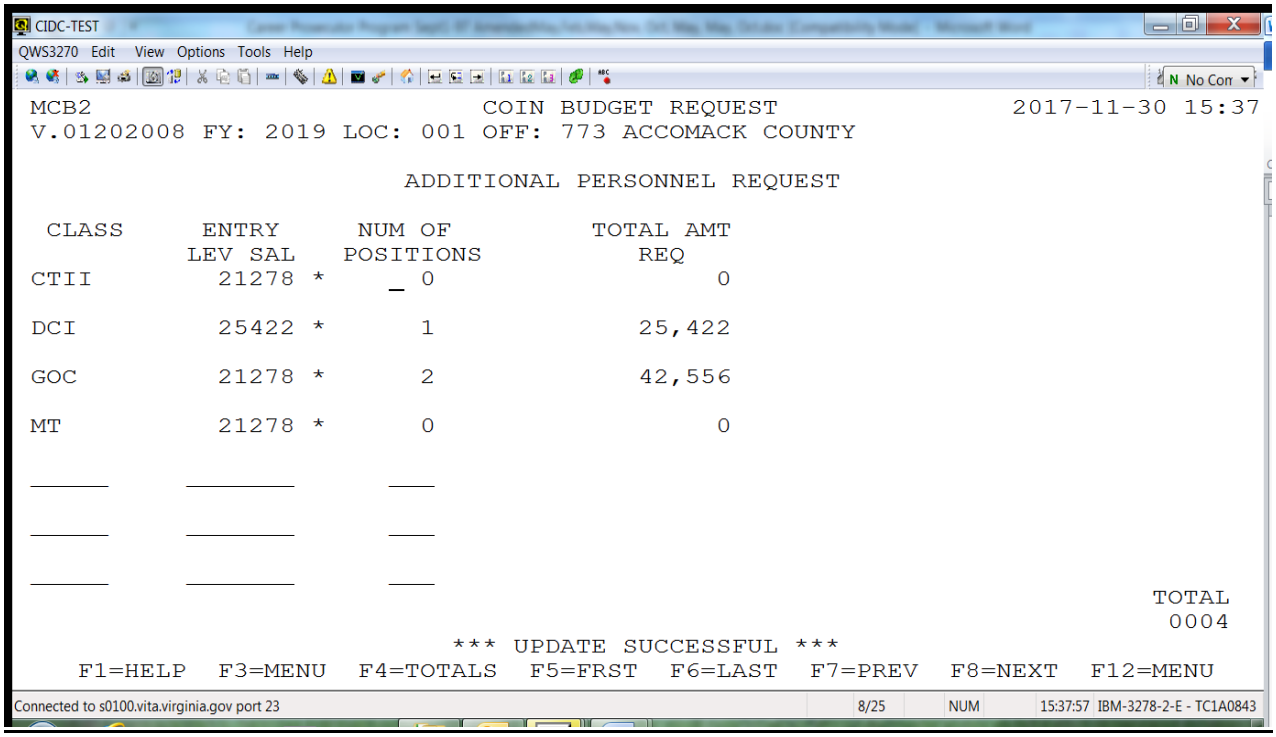
- Coin Main Menu – Select Option #2, COIN Budget Request
- COIN Budget Request Menu - Select Option #2, Additional Personnel Request



Helpful Hints:

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

Option #2 Additional Personnel Request



```
MCB2                          COIN BUDGET REQUEST                2017-11-30 15:37
V.01202008 FY: 2019 LOC: 001 OFF: 773 ACCOMACK COUNTY

                        ADDITIONAL PERSONNEL REQUEST

 CLASS      ENTRY      NUM OF          TOTAL AMT
          LEV SAL    POSITIONS           REQ
CTII        21278 *     _ 0                 0

DCI         25422 *      1             25,422

GOC         21278 *      2             42,556

MT          21278 *      0                 0

_____     ________      ___

_____     ________      ___

_____     ________      ___
                                                                    TOTAL
                                                                     0004
                              *** UPDATE SUCCESSFUL ***
   F1=HELP   F3=MENU   F4=TOTALS   F5=FRST   F6=LAST   F7=PREV   F8=NEXT   F12=MENU
```

Procedures:

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

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

5. Option #3, Temporary Personnel Fund Request

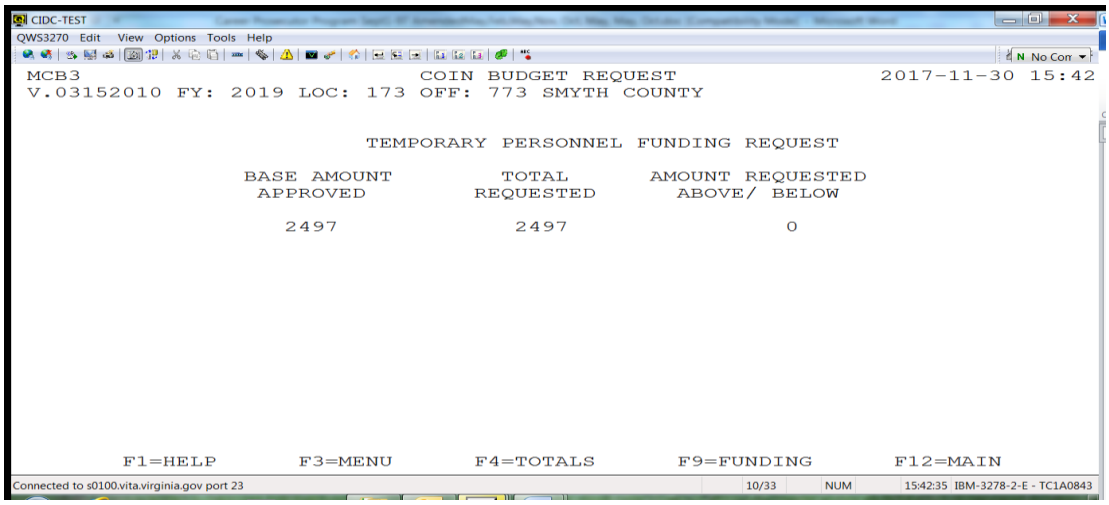
Purpose:

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

Navigational Path:

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

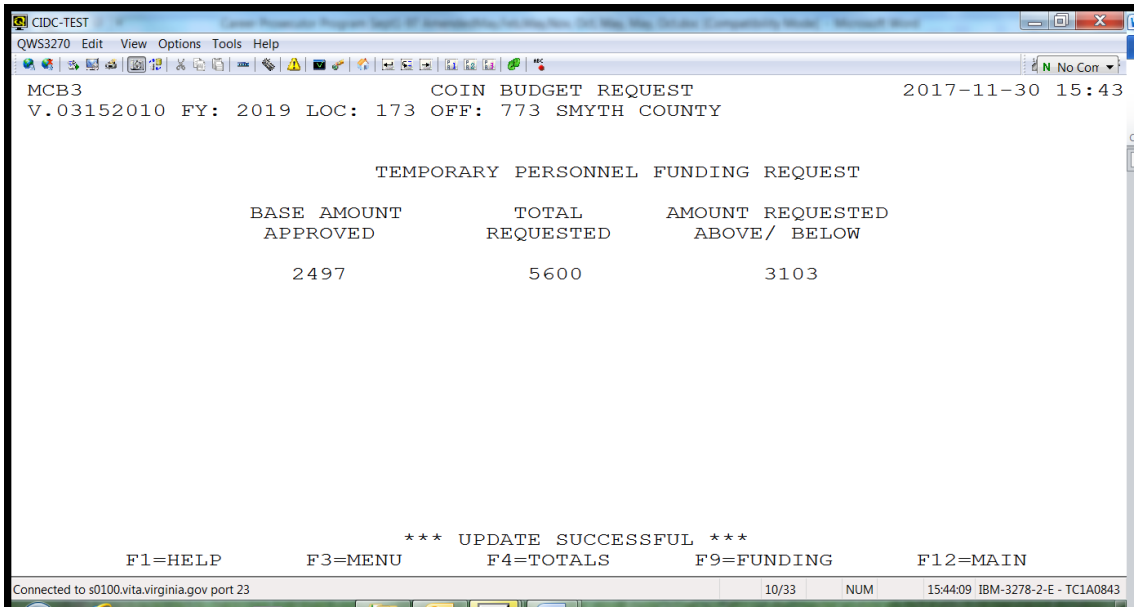
CLERK'S



Helpful Hints:

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

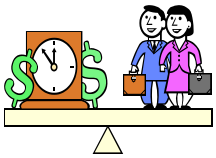
Option #3, Temporary Personnel Fund Request



Procedures:

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

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



6. Option #4, Fully Or Partially Funded Personnel

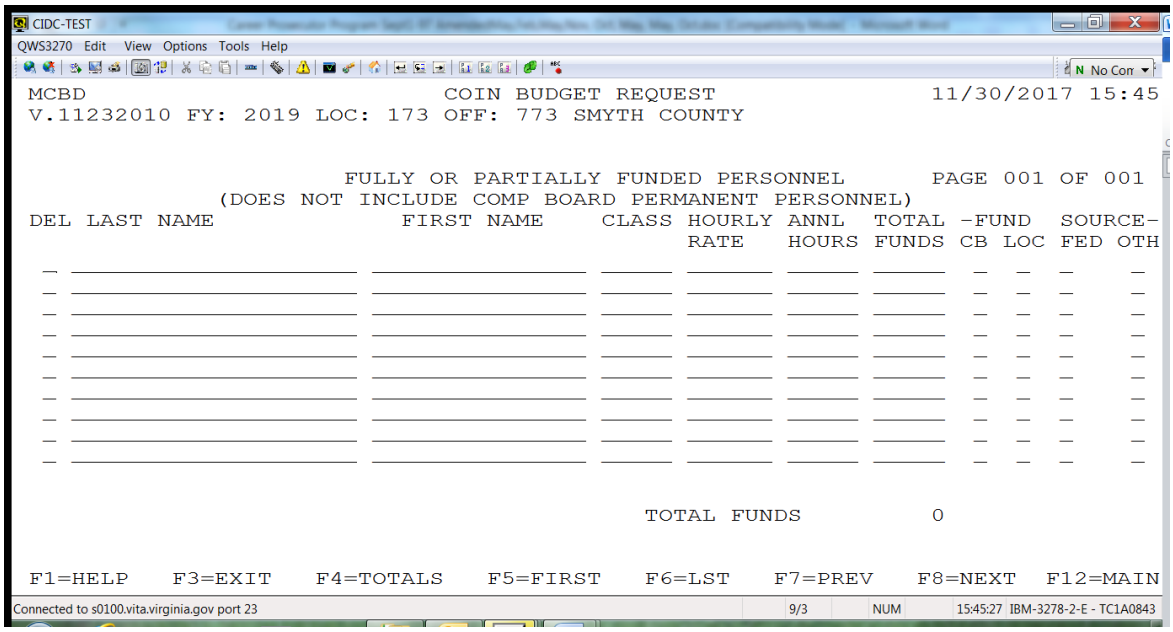
Purpose:

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

Navigational Path:

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

CLERK'S



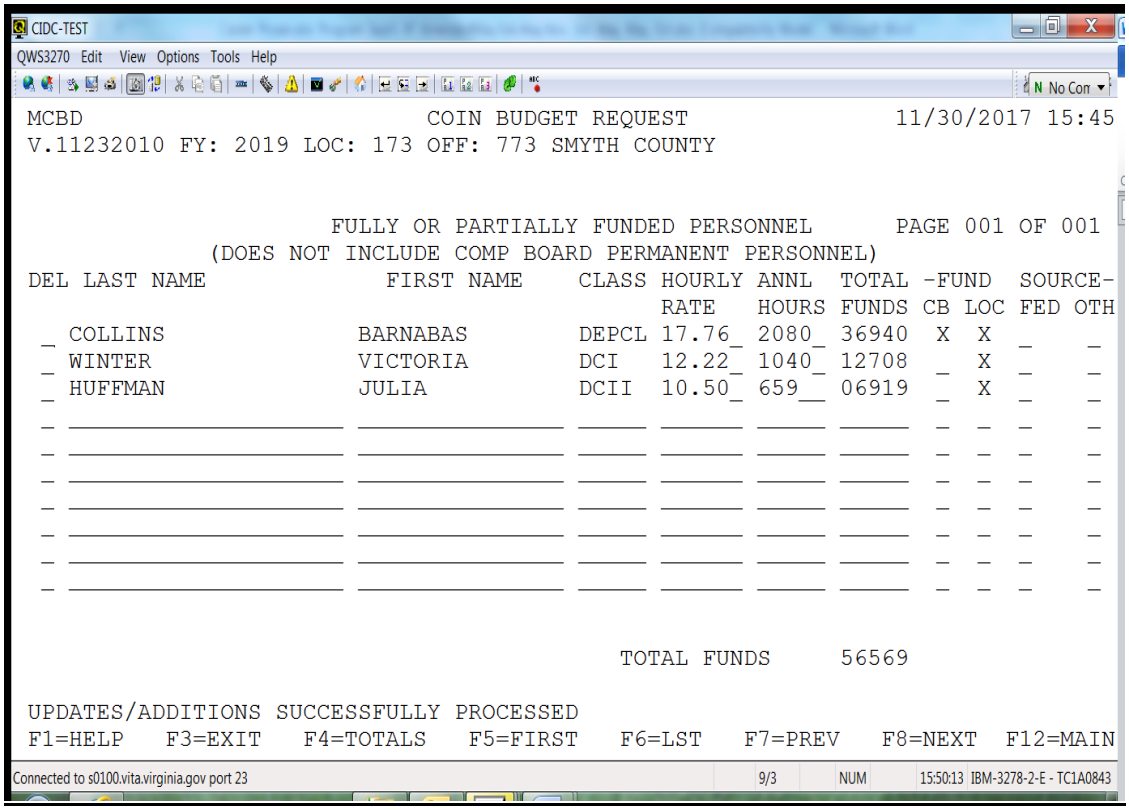
```
MCBD                          COIN BUDGET REQUEST                11/30/2017 15:45
V.11232010 FY: 2019 LOC: 173 OFF: 773 SMYTH COUNTY

                     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
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _
 _ ____________________ _______________ ______ ______ _____ _____  _  _  _    _

                                          TOTAL FUNDS          0

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

Option #4, Fully Or Partially Funded Positions



```
MCBD                          COIN BUDGET REQUEST                11/30/2017 15:45
V.11232010 FY: 2019 LOC: 173 OFF: 773 SMYTH 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
 _ COLLINS               BARNABAS       DEPCL 17.76_ 2080_ 36940  X  X  _    _
 _ WINTER                VICTORIA       DCI   12.22_ 1040_ 12708  _  X  _    _
 _ HUFFMAN               JULIA          DCII  10.50_ 659__ 06919  _  X  _    _
 _ ______________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ______________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ______________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ______________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ______________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ______________________ _______________ _____ ______ _____ _____  _  _  _    _
 _ ______________________ _______________ _____ ______ _____ _____  _  _  _    _

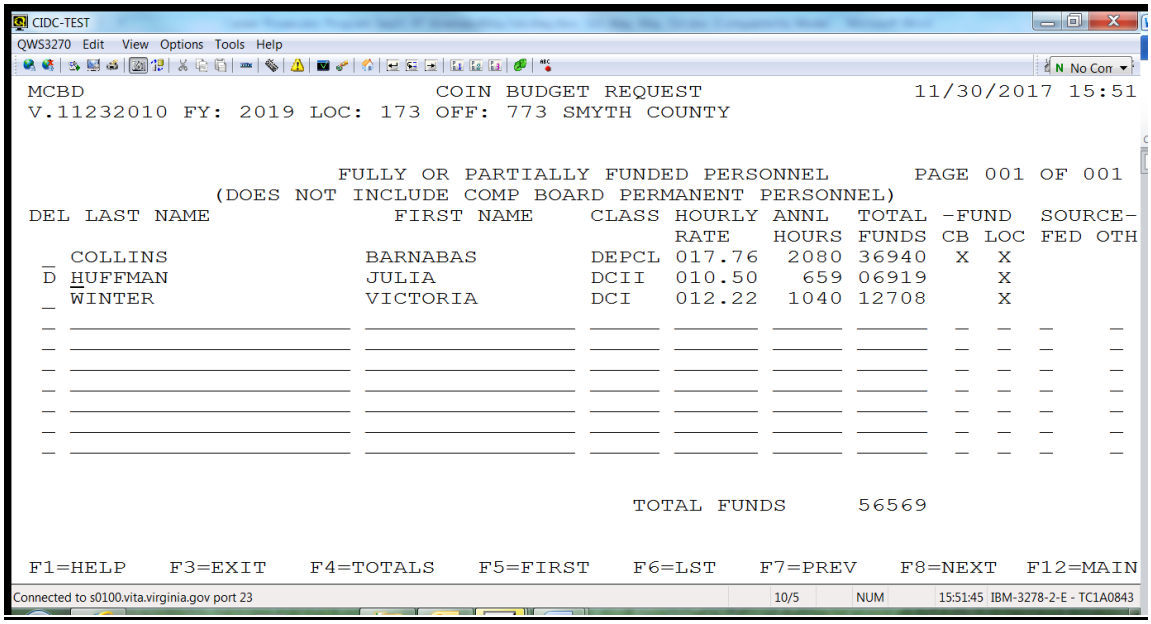

                                          TOTAL FUNDS     56569

UPDATES/ADDITIONS SUCCESSFULLY PROCESSED
F1=HELP   F3=EXIT   F4=TOTALS   F5=FIRST   F6=LST   F7=PREV   F8=NEXT   F12=MAIN
```

Helpful Hints:

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

Option #4, Fully Or Partially Funded Positions



```
MCBD                          COIN BUDGET REQUEST                11/30/2017 15:51
V.11232010 FY: 2019 LOC: 173 OFF: 773 SMYTH 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
 _ COLLINS                BARNABAS        DEPCL 017.76  2080 36940  X  X
 D HUFFMAN                JULIA           DCII  010.50   659 06919     X
 _ WINTER                 VICTORIA        DCI   012.22  1040 12708     X
 _ ____________________   ______________  _____ ______ _____ _____  _  _  _    _
 _ ____________________   ______________  _____ ______ _____ _____  _  _  _    _
 _ ____________________   ______________  _____ ______ _____ _____  _  _  _    _
 _ ____________________   ______________  _____ ______ _____ _____  _  _  _    _
 _ ____________________   ______________  _____ ______ _____ _____  _  _  _    _
 _ ____________________   ______________  _____ ______ _____ _____  _  _  _    _
 _ ____________________   ______________  _____ ______ _____ _____  _  _  _    _

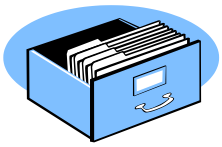
                                          TOTAL FUNDS     56569

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
Annual Hours:	Enter the total number of hours worked annually
Tot Funds:	This field will be calculated for you
CB:	Enter "X", if employee is partially or fully funded by the CB from temporary personnel funds
Loc:	Enter "X", if employee is partially or fully funded by the Locality
Fed:	Enter "X", if employee is partially or fully federally funded
Other:	Enter "X", if employee is partially or fully funded by other sources

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



7. Option #5, Office Expense Funding Request

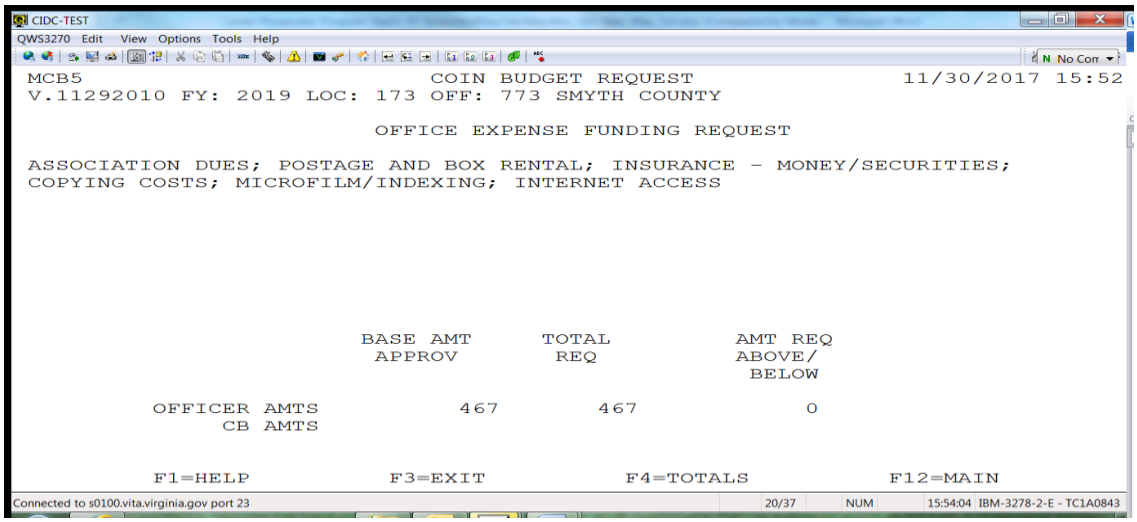
Purpose:

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

Navigational Path:

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

CLERK'S



Helpful Hints:

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

Option #5, Office Expense Funding

Procedures:

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

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

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

8. Option #7, Record Workload Information

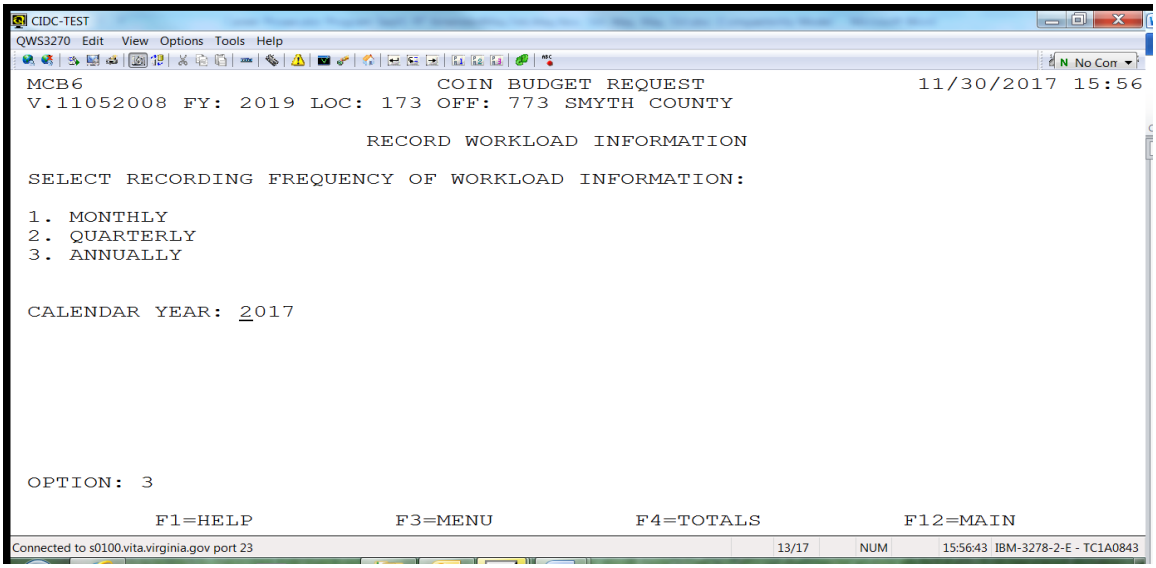
Purpose:

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

Navigational Path:

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

CLERK'S

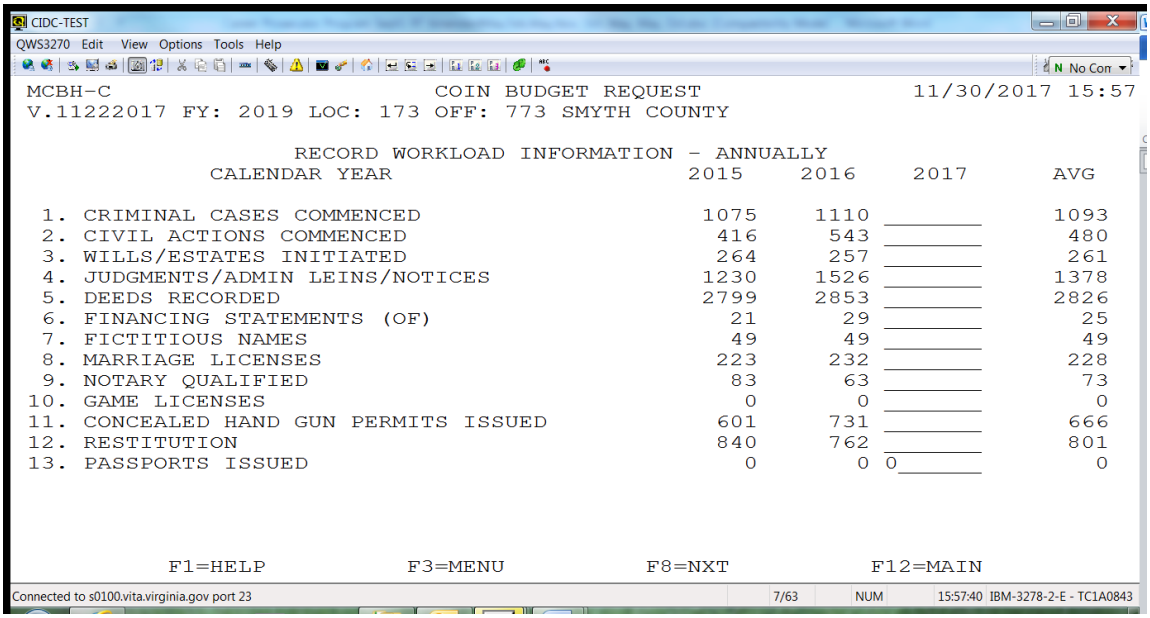


- In January offices must record one full year of workload data for Calendar Year (CY)
- Provide requested information in accordance with Section 15.2-1636.7, Code of Virginia. Information requested is based **on the most recent calendar year (Monthly/Quarterly no longer available)**
- **Select 'Option 3'**, "Annually" and press the **"Enter"** key to proceed to the next screen
- The Workload Measures screens must be processed and an amount must be entered for each workload measure for the most recent ending calendar year
  - ✓ The screens will also display the amounts for the previous two calendar years
  - ✓ Enter the number of transactions for each workload measure listed; if not applicable, to your office enter '0', and "TAB" to the next field
  - ✓ **Do Not Leave Blanks** or the system will default the item to zero
- Press **'F3=Exit'** to exit the screen to the Budget Request Menu
- Press 'F12=Main' returns you to the COIN Main Menu

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

Option #7 Record Workload Information

Option #3 Annual Screen



```
MCBH-C                          COIN BUDGET REQUEST                11/30/2017 15:57
V.11222017 FY: 2019 LOC: 173 OFF: 773 SMYTH COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                       2015    2016    2017      AVG

 1. CRIMINAL CASES COMMENCED                      1075    1110 _______      1093
 2. CIVIL ACTIONS COMMENCED                        416     543 _______       480
 3. WILLS/ESTATES INITIATED                        264     257 _______       261
 4. JUDGMENTS/ADMIN LEINS/NOTICES                 1230    1526 _______      1378
 5. DEEDS RECORDED                                2799    2853 _______      2826
 6. FINANCING STATEMENTS (OF)                       21      29 _______        25
 7. FICTITIOUS NAMES                                49      49 _______        49
 8. MARRIAGE LICENSES                              223     232 _______       228
 9. NOTARY QUALIFIED                                83      63 _______        73
10. GAME LICENSES                                    0       0 _______         0
11. CONCEALED HAND GUN PERMITS ISSUED              601     731 _______       666
12. RESTITUTION                                    840     762 _______       801
13. PASSPORTS ISSUED                                 0       0 0_______         0

          F1=HELP          F3=MENU          F8=NXT          F12=MAIN
```

1. **CRIMINAL CASES:** Criminal cases commenced as reported on the monthly caseload reports. If the caseload reports are properly prepared, each count in the indictment is a separate case and each reinstatement is a separate case. Some of the work included is setting up the file and docket; summoning the grand jury and grand jury witnesses; issuing capiases; determination of indigence; receiving all papers filed; attending all hearings; processing all orders; summoning trial jurors and witnesses; securing exhibits; payment to jurors and witnesses; allowing the public and press access to case papers; keeping track of court reporter cost and recordings; keeping track of court-appointed attorney cost; computing fines and costs; collecting fines, costs and restitution; debt set-off processing; communicating with prisoner, DMV, Department of Corrections and Probation and Parole office; preparing record for appeal to higher court; filming and indexing orders and maintained files.
2. **CIVIL ACTIONS COMMENCED:** Civil Action cases commenced as reported on the monthly caseload reports . Counted at the time cases are filed even though the case may remain on the docket for years. Any trust fund administration is included as part of the original case and not as a separate case. Reinstatements are counted as separate cases. Law cases on the average take more of the clerk's time than chancery because chancery cases rarely require a jury and many are decided in chambers on written depositions.

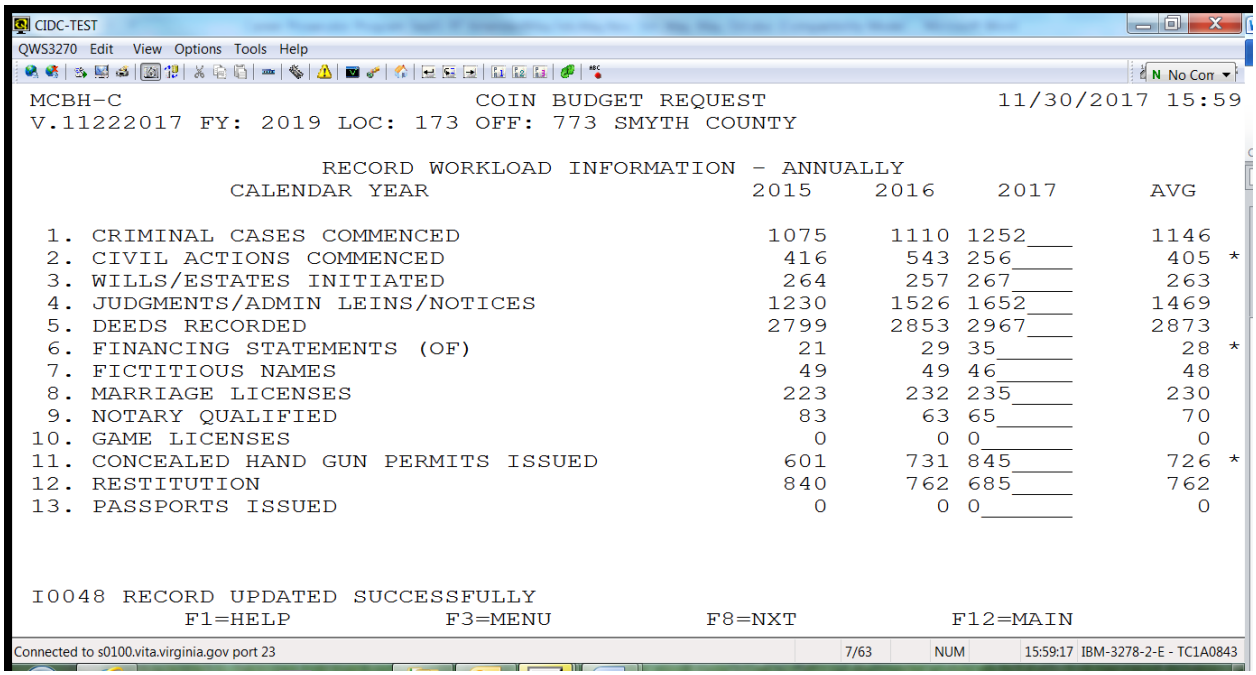
3. **WILLS/ESTATES INITIATED:** A file opened for a decedent, a trust or a person under a disability, counted only at the time the file is initiated and not re-counted at the time of subsequent transactions. This should include affidavits of intestate transfer. A single case may involve the probate of will, the qualification of an executor, recording a bond, recording list of heirs, certificates of qualification, recording final accounting, and perhaps many interim accounting, perhaps qualification of administrator, c.t.a., d.b.n., recording affidavit of probate notice, show cause orders and court hearings on delinquent fiduciaries; and writing clerk's order associated with any of the above. At the other extreme, a case MAY BE NOTHING MORE THAN THE RECORDING AND FILING OF AN AFFIDAVIT OF INTESTATE TRANSFER.

Option #7 Record Workload Information
Option #3 Annual Screen

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

7-11 FICTITIOUS NAME, MARRIAGE LICENSE, NOTARY QUALIFIED, GAME LICENSES: Count each activity that occurs, except for game licenses count each privilege, even if it is on one sheet of paper, for which the clerk receives a $1.00 fee per privilege.

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



```
CIDC-TEST
QWS3270  Edit  View  Options  Tools  Help

MCBH-C                    COIN BUDGET REQUEST                11/30/2017 15:59
V.11222017 FY: 2019 LOC: 173 OFF: 773 SMYTH COUNTY

                 RECORD WORKLOAD INFORMATION - ANNUALLY
            CALENDAR YEAR                      2015    2016    2017      AVG

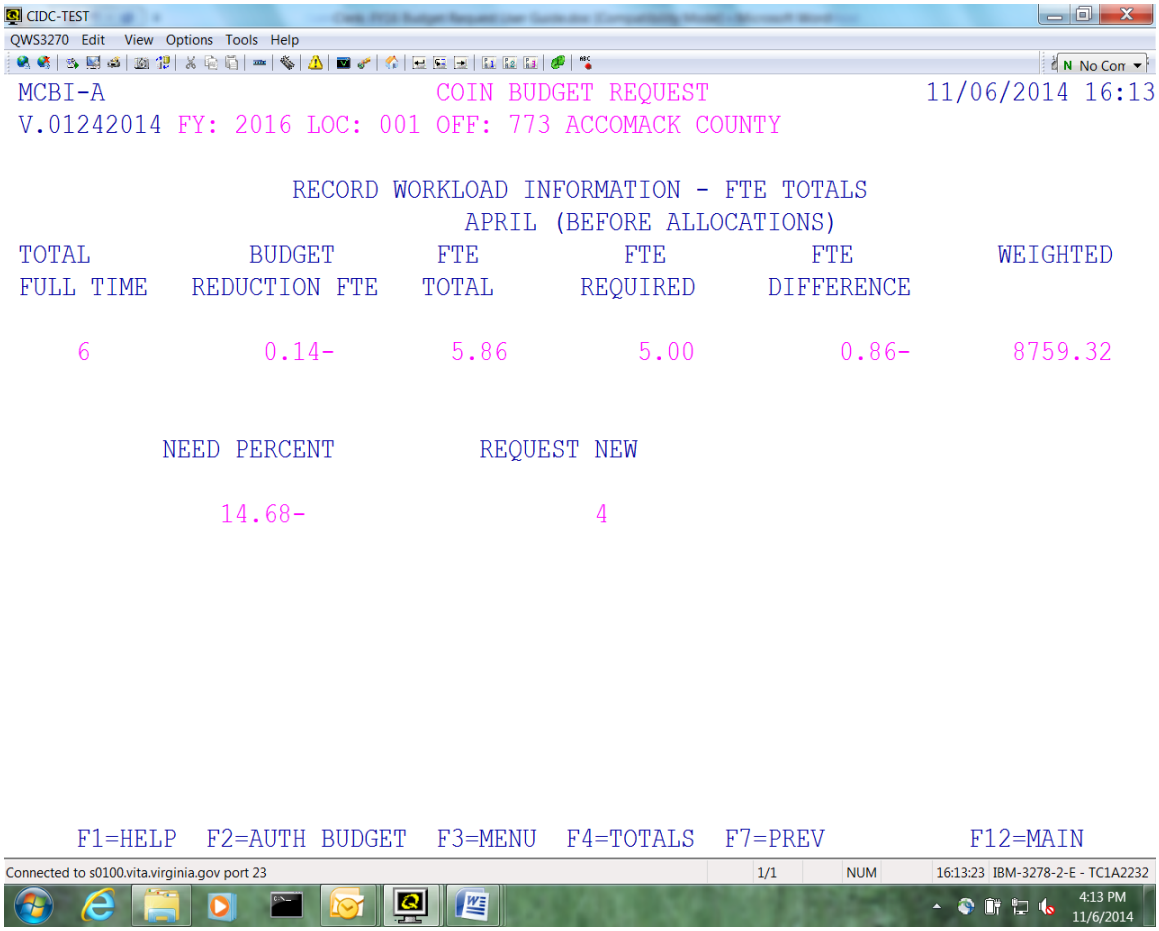
 1. CRIMINAL CASES COMMENCED                    1075    1110 1252____    1146
 2. CIVIL ACTIONS COMMENCED                      416     543 256_____     405 *
 3. WILLS/ESTATES INITIATED                      264     257 267_____     263
 4. JUDGMENTS/ADMIN LEINS/NOTICES               1230    1526 1652____    1469
 5. DEEDS RECORDED                              2799    2853 2967____    2873
 6. FINANCING STATEMENTS (OF)                     21      29 35______      28 *
 7. FICTITIOUS NAMES                              49      49 46______      48
 8. MARRIAGE LICENSES                            223     232 235_____     230
 9. NOTARY QUALIFIED                              83      63 65______      70
10. GAME LICENSES                                  0       0 0_______       0
11. CONCEALED HAND GUN PERMITS ISSUED            601     731 845_____     726 *
12. RESTITUTION                                  840     762 685_____     762
13. PASSPORTS ISSUED                               0       0 0_______       0

I0048 RECORD UPDATED SUCCESSFULLY
        F1=HELP          F3=MENU          F8=NXT          F12=MAIN
Connected to s0100.vita.virginia.gov port 23   7/63   NUM   15:59:17   IBM-3278-2-E - TC1A0843
```

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

Option #7 Record Workload Information

Option #3 Annual Screen



```
MCBI-A                          COIN BUDGET REQUEST                 11/06/2014 16:13
V.01242014 FY: 2016 LOC: 001 OFF: 773 ACCOMACK COUNTY

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

    6           0.14-        5.86         5.00         0.86-        8759.32


          NEED PERCENT          REQUEST NEW

              14.68-                  4



     F1=HELP   F2=AUTH BUDGET   F3=MENU   F4=TOTALS   F7=PREV          F12=MAIN
```

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

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

Option #7 Record Workload Information

STAFFING METHODOLOGY

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

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

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

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

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

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

Option #7 Record Workload Information

- Select option 3 "Annual" you will only have to enter workload data in January for the previous calendar year

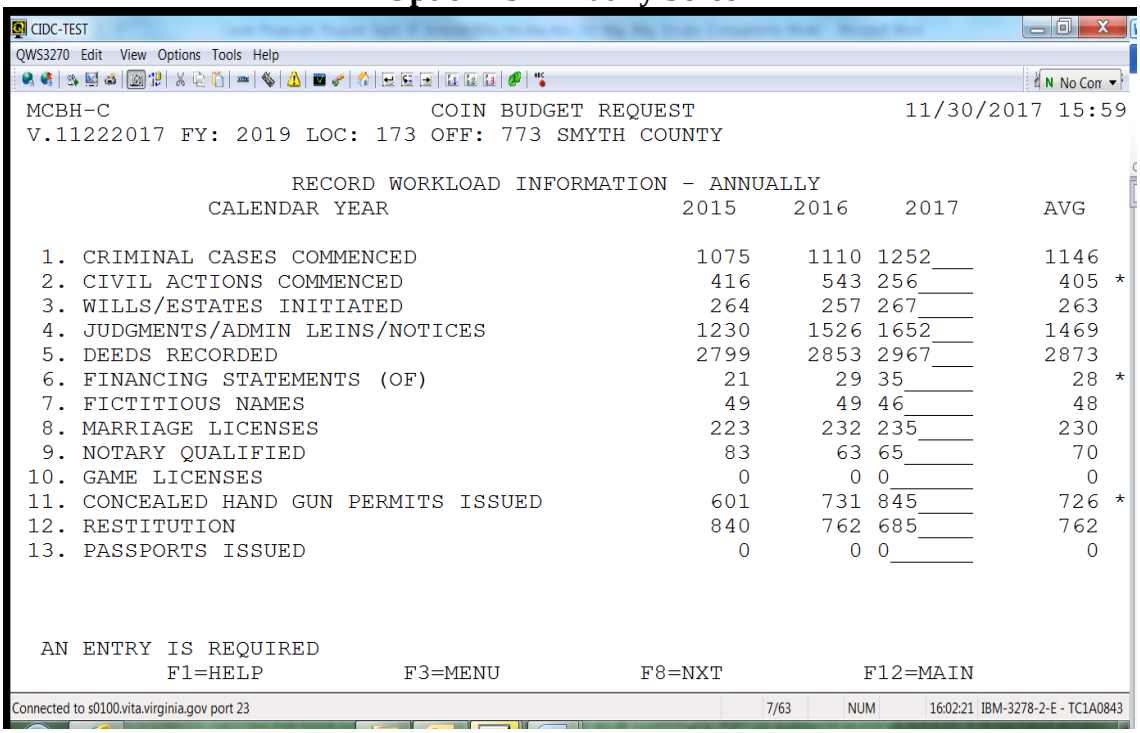
Option #1 Monthly Screen

This function is no longer available. Workload data must be entered **Annually**.

Option #2 Quarterly Screen

This function is no longer available. Workload data must be entered **Annually**.

Option #3 Annually Screen



```
MCBH-C                        COIN BUDGET REQUEST                11/30/2017 15:59
V.11222017 FY: 2019 LOC: 173 OFF: 773 SMYTH COUNTY

                    RECORD WORKLOAD INFORMATION - ANNUALLY
              CALENDAR YEAR                      2015    2016    2017      AVG

 1. CRIMINAL CASES COMMENCED                      1075    1110 1252___      1146
 2. CIVIL ACTIONS COMMENCED                        416     543 256____       405 *
 3. WILLS/ESTATES INITIATED                        264     257 267____       263
 4. JUDGMENTS/ADMIN LEINS/NOTICES                 1230    1526 1652___      1469
 5. DEEDS RECORDED                                2799    2853 2967___      2873
 6. FINANCING STATEMENTS (OF)                       21      29 35_____        28 *
 7. FICTITIOUS NAMES                                49      49 46_____        48
 8. MARRIAGE LICENSES                              223     232 235____       230
 9. NOTARY QUALIFIED                                83      63 65_____        70
10. GAME LICENSES                                    0       0 0______         0
11. CONCEALED HAND GUN PERMITS ISSUED              601     731 845____       726 *
12. RESTITUTION                                    840     762 685____       762
13. PASSPORTS ISSUED                                 0       0 0______         0


 AN ENTRY IS REQUIRED
          F1=HELP          F3=MENU          F8=NXT          F12=MAIN
```

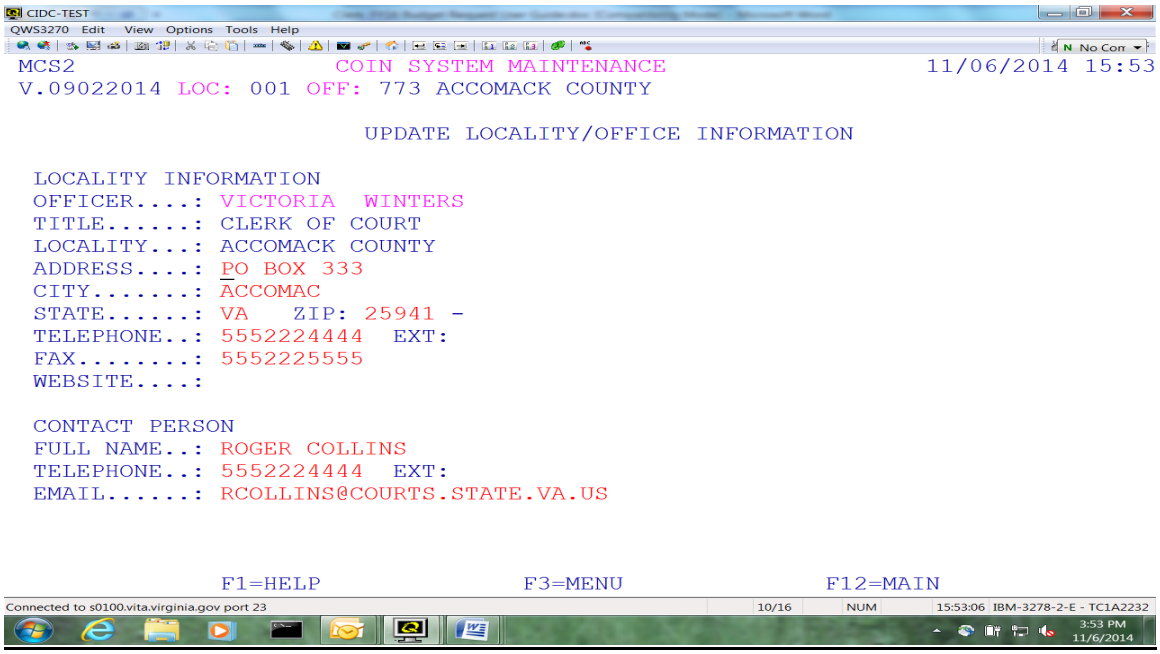
9. Option #8 – Update Locality Information

Purpose:

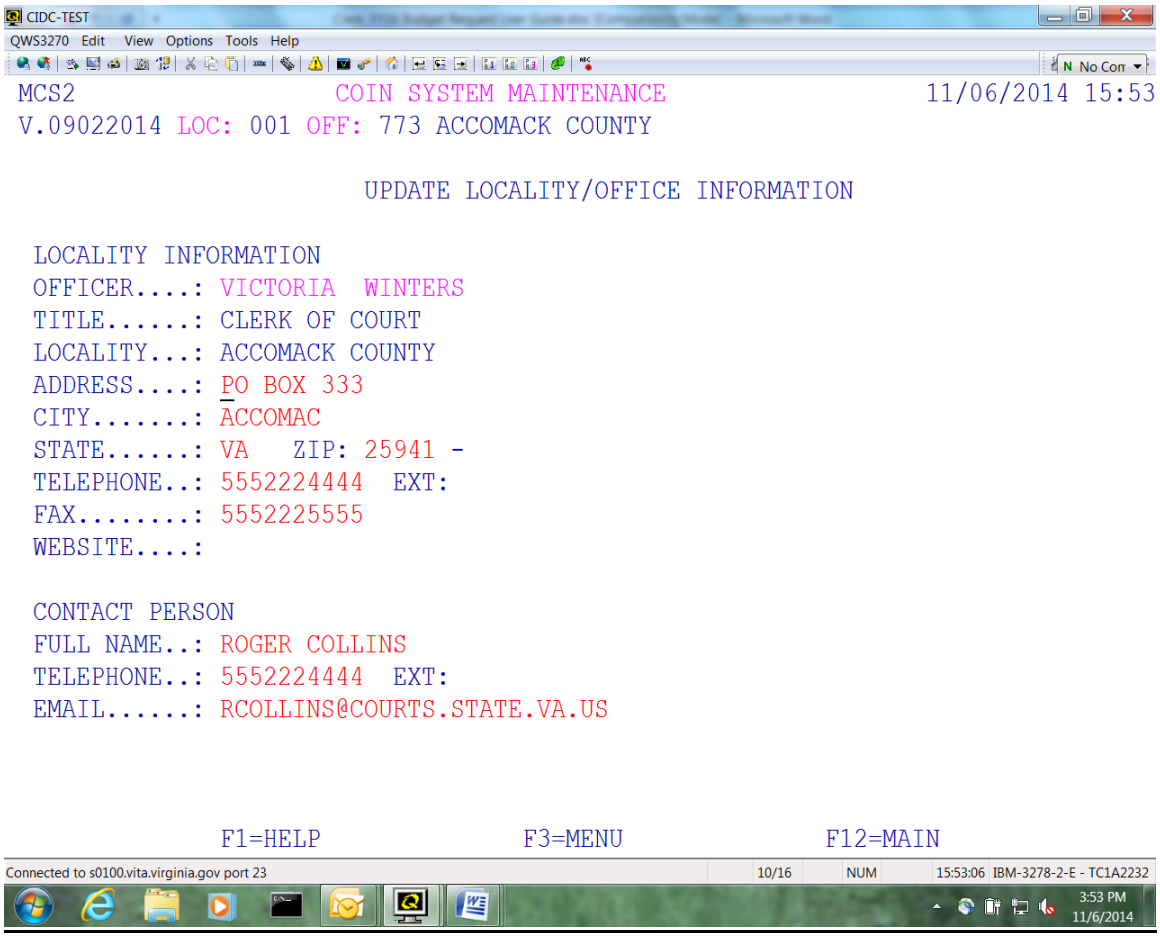
This screen will be displayed when 'Option #8, Update Locality Information' is selected on the Budget Request Menu. This screen is available for updating the locality address, phone, and fax numbers. It is also used to advise the Compensation Board staff of appropriate contacts for questions regarding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

Navigational Path:

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



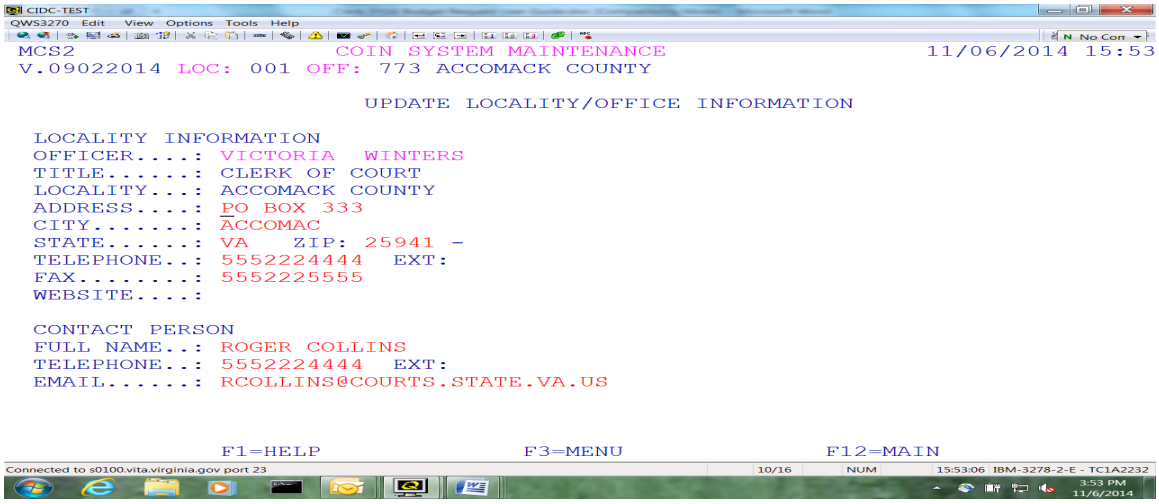
Option #8 Update Locality Information



Helpful Hints:

- Data fields on the Update Locality Information screen must be completed before Certifying the Budget Request
- It is very important that we obtain the name of the person we can contact if we have questions regarding your Budget Request
- Screens will time out after 15 minutes of inactivity.
- Contact Person- office contact for reimbursement and budget submission information

Option #8 Update Locality Information



Procedures:

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

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

Locality Information

Officer Name:	For display purposes only.
Title:	For display purposes only.
Locality:	Enter County/City name
Address:	Enter the correct mailing address for your office.
City:	Enter the correct City for your mailing address.
State:	Enter the correct State for your mailing address.
Zip:	Enter the correct Zip code for your mailing address. If the last 4 positions of the zip code are not known, you may leave this field blank.
Telephone:	Enter the correct Phone number for your office.
Fax #:	Enter the correct Facsimile number for your office.
Website:	Enter the correct
Contact Person:	Enter the correct name of person responsible for entering data in COIN system.
Telephone:	Enter the correct Phone number for contact person.
Email:	Enter the correct email address for contact person.

3. Press the 'Enter' key, when you have corrected and completed the information requested
4. Press 'F3 =Exit' to exit the screen to budget request menu

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

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

5. If you wish to receive communications from the Compensation Board via email, you may update the email addresses for Constitutional Officers, Contact or county/city administrators for your offices by clicking on the link below and following these instructions:
    a. http://www.scb.virginia.gov/cbemail1.cfm
    b. Enter your FIPS Code **001-840** (Accomack-Winchester) The number you use to access COIN each month
    c. Enter you Office Code **-773** (Clerk)
    d. To change a current email address click on the email address, correct the email address and then click '**UPDATE**'
    e. Click '**SUBMIT'**
    f. To add a new email address Click '**ADD EMAIL ADDRESS'**
    g. To delete an email address, click on the email address to be deleted and click '**DELETE**'
    h. To change a current email address click on the email address, correct the email address and then click '**UPDATE**'

10. Option #9, Special Program Certification

Purpose:

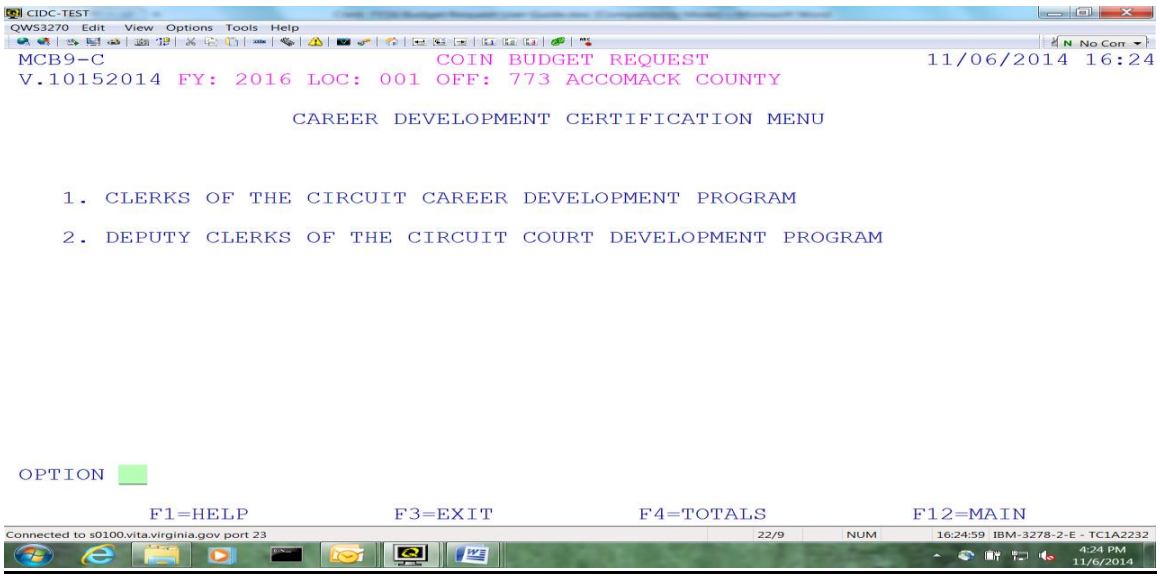
Specified Certification Programs are accessed from the COIN Budget Request menu. The program will determine based on locality and office which special programs to display.

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

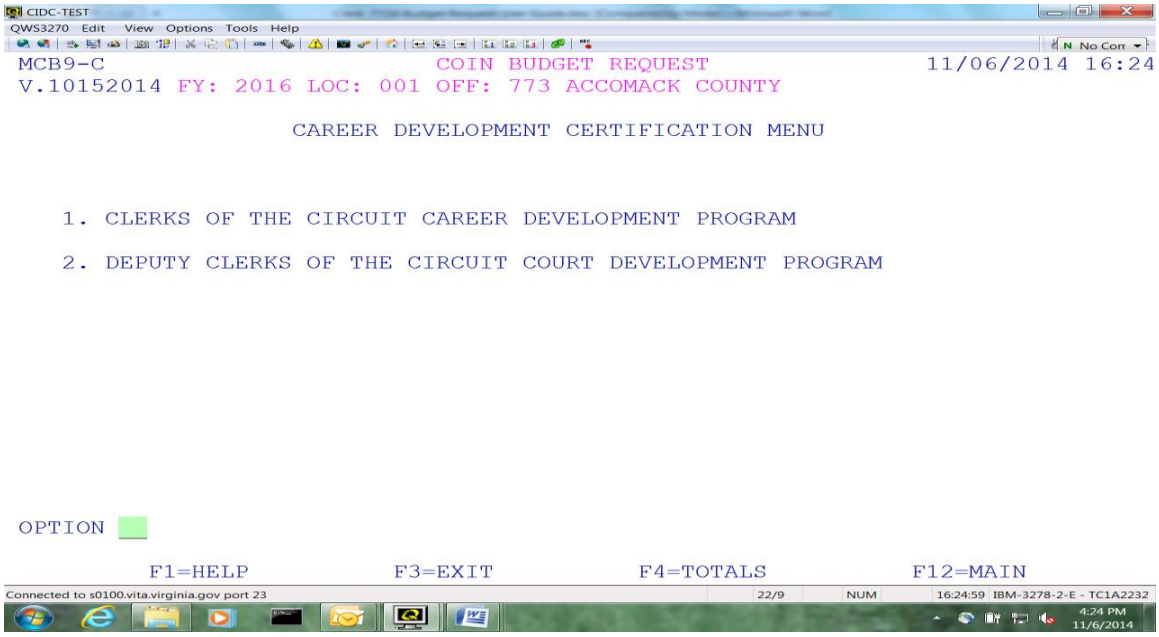
- **Deputy Clerk Career Development Program**
  - ✓ The blanks on this screen are only for the names of VCCA Certified Deputy Clerks, **not** deputies who are participating and enrolled.
  - ✓ Deputies that have already received their CDP increase **must** be entered on this screen **each year** to maintain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

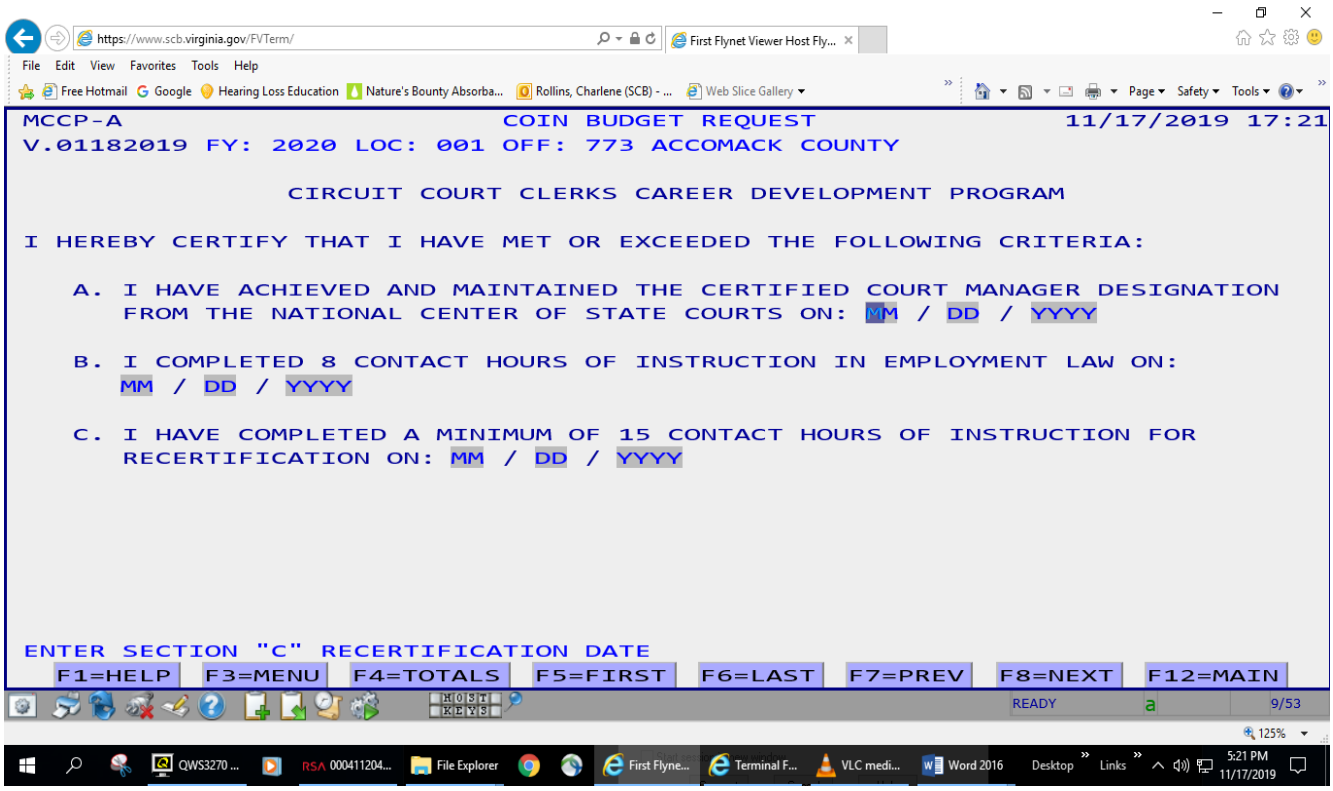
- Read through each Special Program Certification Screen and if you comply with the program criteria as stated
  - ✓ List employees that participate in the Career Development Programs
  - ✓ Enter the Officer's SCB USERID as the Approval User-ID

- Option #1 Clerks of the Circuit Court Career Development Program
- Option #2 Deputy Clerks of the Circuit Court Career Development Program

Option #9, Special Program Certification

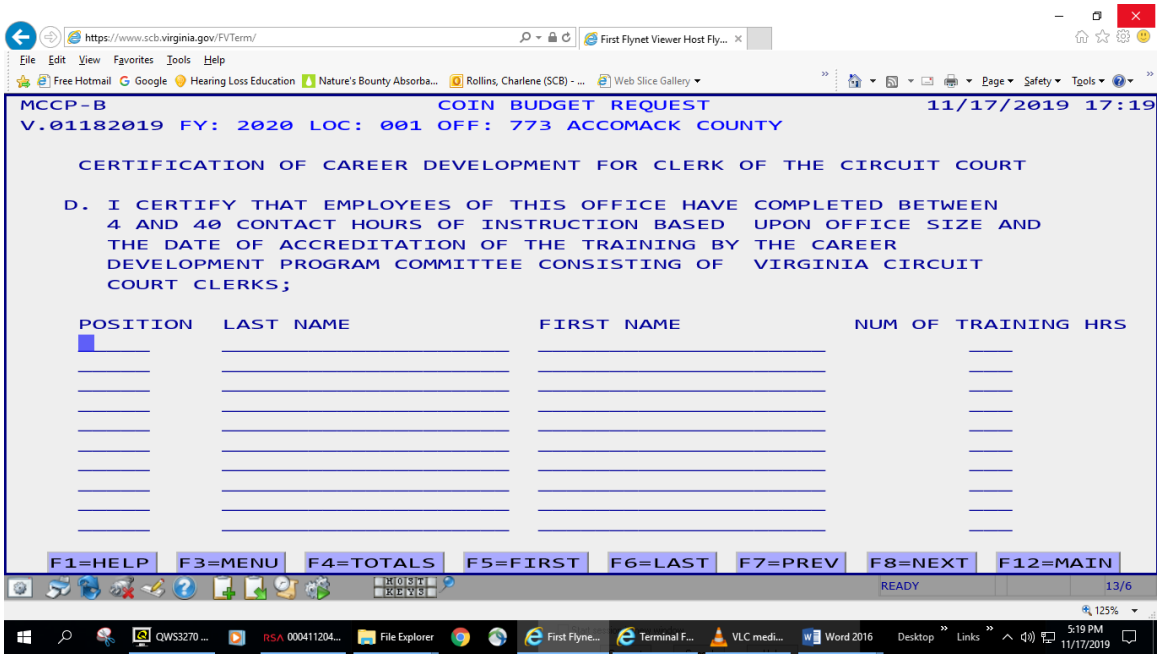
Option #1 Clerk of the Circuit Court Career Development Program

Screen 1 of 6



- Enter the dates achieved Certification from National Center of State Courts
- Enter the date completed 8 contact hours of Lawful Employment
- Enter the date achieved 15 contact hours for recertification,
    - If you previously completed the initial Clerks Certification
    - If this is the first year you completed the Clerks Certification from NCSC, enter the same date in this option as these fields are required.

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



Based on your population enter the employees that have completed between 4 and 40 contact hours of instruction. It is **not** necessary to enter all employees that have completed course work on this screen but only employees necessary to meet the required number of annual contact hours based on your population. **Example** – If your population is between 70,000-99,999, and one employee completed 22 hours of contact course work then enter only the one employee on this screen.

Locality Population**	Required Minimum Number of Annual Contact Hours
Less than - 19,999	4
20,000 – 39,999	10
40,000 – 69,999	16
70,000 – 99,999	22
100,000 – 174,999	28
175,000 – 249,999	34
250,000 and over	40

Screen 2 of 6

```
COIN
QWS3270  Edit  View  Options  Tools  Help

MCCP-B                        COIN BUDGET REQUEST                11/29/2017 17:28
V.12042015 FY: 2019 LOC: 001 OFF: 773 ACCOMACK COUNTY

                 CIRCUIT COURT CLERKS CAREER DEVELOPMENT PROGRAM

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

   E. I HAVE DEVELOPED AND IMPLEMENTED WRITTEN POLICIES CONSISTENT WITH STATE
      AND FEDERAL LAW ADDRESSING LEAVE AND ATTENDANCE, EQUAL OPPORTUNITY,
      SEXUAL HARASSMENT, RECRUITMENT AND SELECTION, EMPLOYEE DISCIPLINARY
      PROCEDURES, AND FREEDOM OF INFORMATION OR OTHERWISE ADOPTED, BY WRITTEN
      STATEMENT, LOCAL GOVERNMENT POLICIES THAT MEET THE SAME STANDARD;

   F. I HAVE WRITTEN JOB DESCRIPTIONS FOR EACH FULL-TIME EMPLOYEE AND CONDUCT
      ANNUAL PERFORMANCE EVALUATIONS WITH EACH FULL-TIME EMPLOYEE;

   G. I HAVE ADOPTED THE COMPENSATION BOARD'S MINIMUM CRITERIA FOR DEPUTY CLERK
      CAREER DEVELOPMENT PLANS;



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

Connected to s0100.vita.virginia.gov port 23   1/1   NUM   17:29:05  IBM-3278-3-E - TC1A0573
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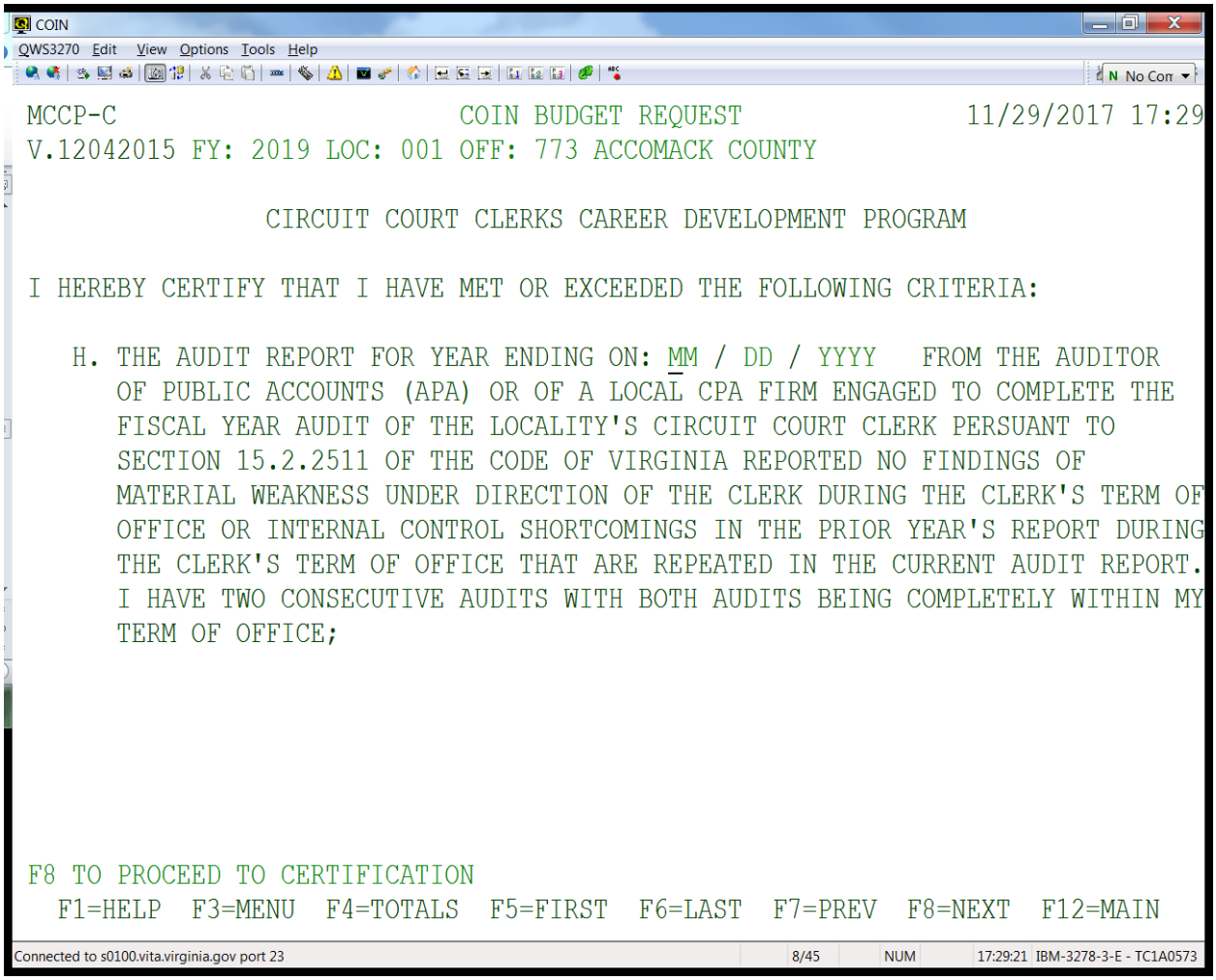
Read and then Press 'F8' to proceed to the next page

Option #9, Special Program Certification

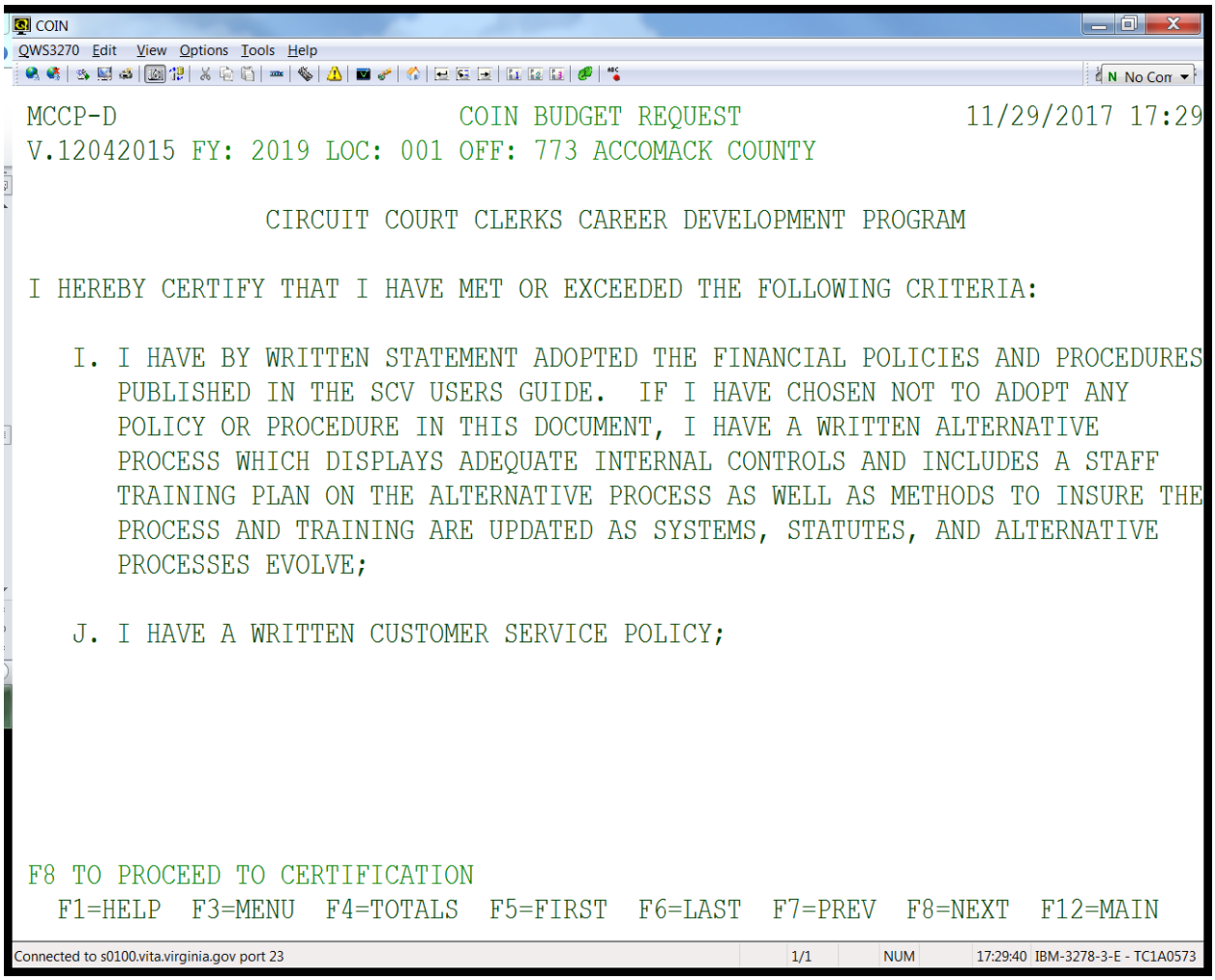
Screen 3 of 6



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

Option #9, Special Program Certification

Screen 4 of 6



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

Option #9, Special Program Certification

Screen 5 of 6

```
MCCP-E                        COIN BUDGET REQUEST              11/29/2017 17:29
V.12042015 FY: 2019 LOC: 001 OFF: 773 ACCOMACK COUNTY

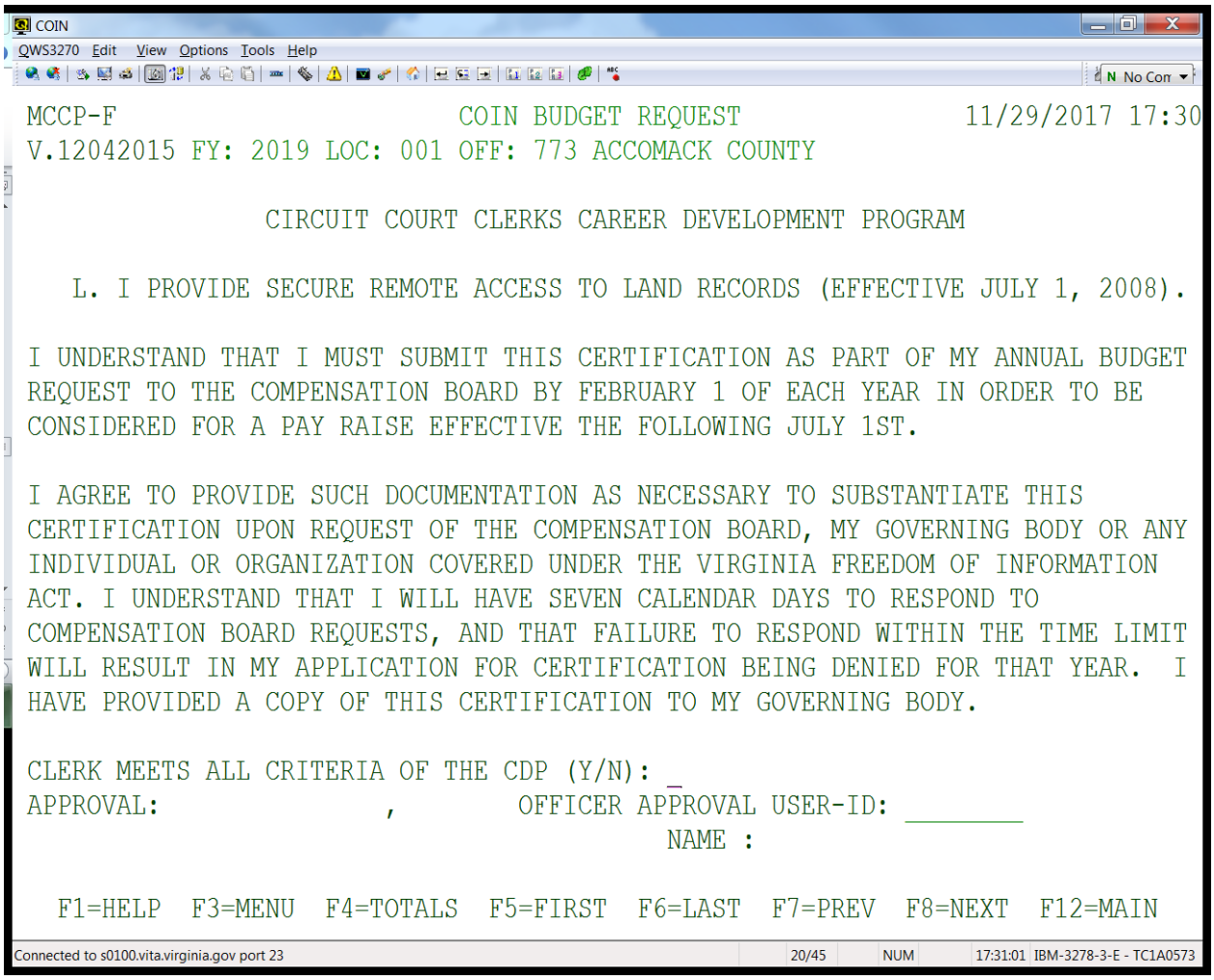
                CIRCUIT COURT CLERKS CAREER DEVELOPMENT PROGRAM

I HEREBY CERTIFY THAT I HAVE MET OR EXCEEDED THE FOLLOWING CRITERIA:
   K. I HAVE ADOPTED AND PUBLISHED PERFOMANCE STANDARDS FOR EACH MAJOR DUTY OF
      THE OFFICE OF THE CIRCUIT COURT CLERK, WHICH MEET OR EXCEED CODE OF
      VIRGINIA REQUIREMENTS. THESE PERFORMANCE STANDARDS FOR EACH MAJOR DUTY
      ARE ESTABLISHED AND BASED UPON ADOPTION OF THE PERFORMANCE, PROCEDURAL,
      AND BEST PRACTICE SUGGESTIONS PUBLISHED IN THE 5 MAJOR PRACTICE MANUALS
      JOINTLY PREPARED AND PUBLISHED BY THE VIRGINIA COURT CLERK'S ASSOCIATION
      AND THE OFFICE OF THE EXECUTIVE SECRETARY OF THE SUPREME COURT OF
      VIRGINIA. IF I ADOPT ALTERNATE PROCEDURES IN MY OFFICE THAT DIFFER FROM A
      PROCEDURE SUGGESTED IN SAID PRACTICE MANUALS, THEN;
      (1) I MAINTAIN DOCUMENTATION OF THE ALTERNATIVE PROCEDURE(S);
      (2) THE ALTERNATIVE PROCEDURES MEET INTERNAL CONTROL REQUIREMENTS
          ACCEPTABLE TO THE STATE AUDITOR; AND
      (3) I MAINTAIN A STAFF TRAINING PLAN ON THE ALTERNATIVE PROCEDURES AS
          WELL AS METHODS TO KEEP THE PROCEDURES AND STAFF TRAINING UPDATED AS
          TECHNOLOGY, STATUTES AND REGULATIONS, AND ALTERNATIVE PROCESSES
          EVOLVE.
F8 TO PROCEED TO CERTIFICATION
  F1=HELP  F3=MENU  F4=TOTALS  F5=FIRST  F6=LAST  F7=PREV  F8=NEXT  F12=MAIN
```

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

Option #9, Special Program Certification

Screen 6 of 6



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

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

<u>Helpful Hints</u>

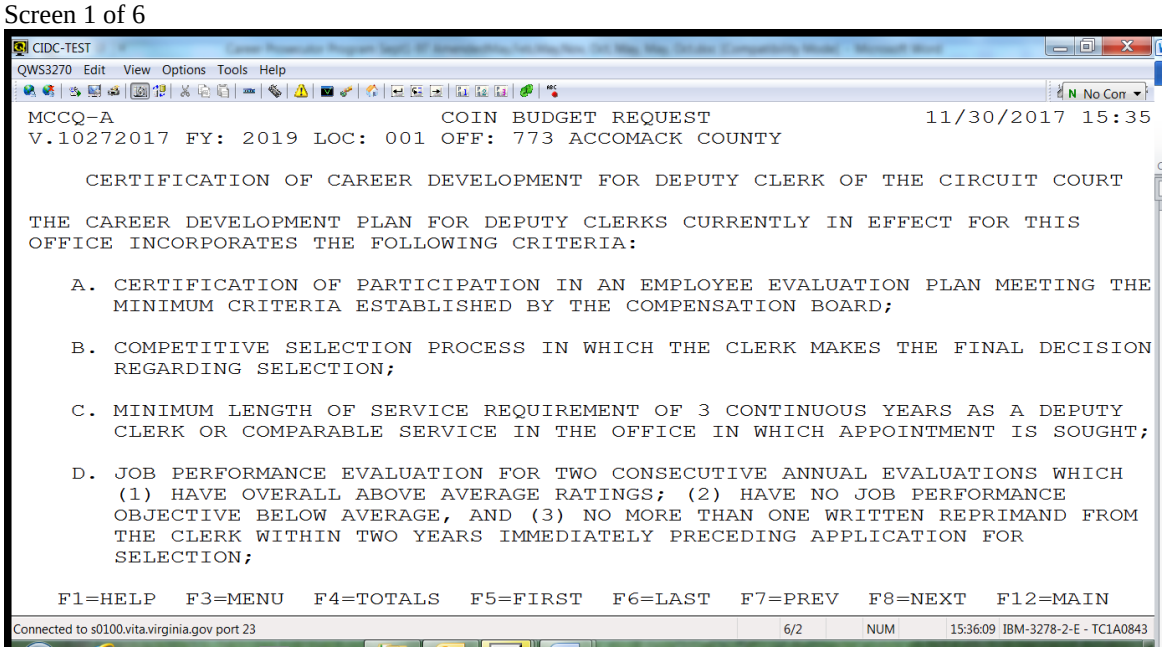
- <u>If the Clerk is **not certified** you **must** answer "N' to the question "Clerk meets all criteria of CDP".</u>

Option #9, Special Program Certification

Option #2 Deputy Clerk of the Circuit Court Career Development Program

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

Screen 1 of 6



```
MCCQ-A                          COIN BUDGET REQUEST                11/30/2017 15:35
V.10272017 FY: 2019 LOC: 001 OFF: 773 ACCOMACK COUNTY

     CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY CLERK OF THE CIRCUIT COURT

 THE CAREER DEVELOPMENT PLAN FOR DEPUTY CLERKS CURRENTLY IN EFFECT FOR THIS
 OFFICE INCORPORATES THE FOLLOWING CRITERIA:

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

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

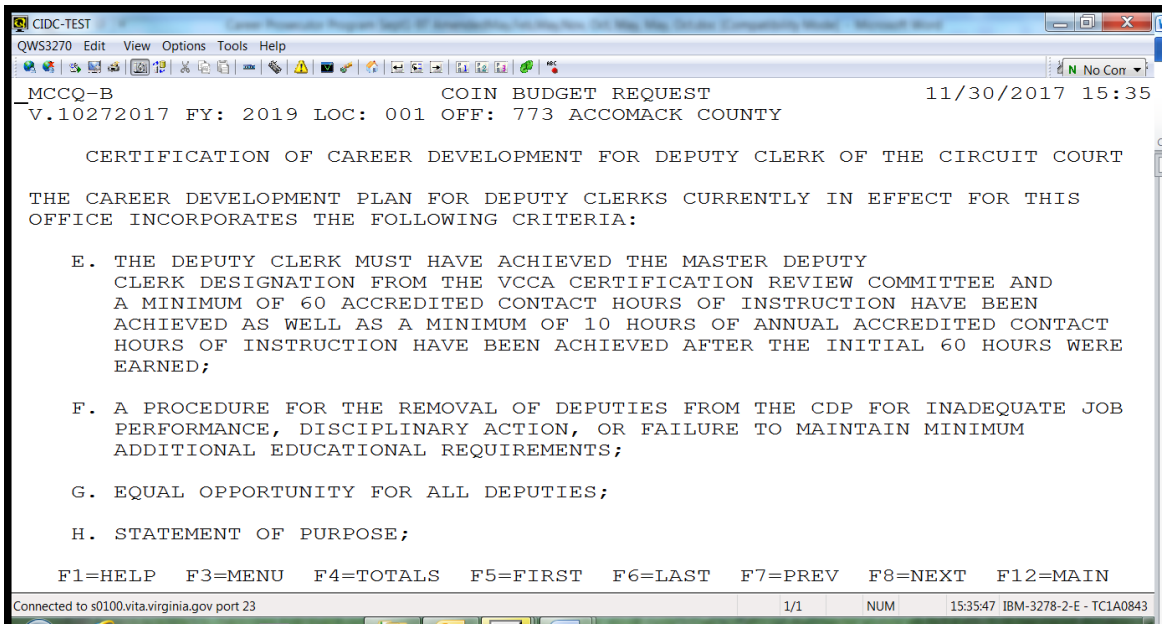
    C. MINIMUM LENGTH OF SERVICE REQUIREMENT OF 3 CONTINUOUS YEARS AS A DEPUTY
       CLERK OR COMPARABLE SERVICE IN THE OFFICE IN WHICH APPOINTMENT IS SOUGHT;

    D. JOB PERFORMANCE EVALUATION FOR TWO CONSECUTIVE ANNUAL EVALUATIONS WHICH
       (1) HAVE OVERALL ABOVE AVERAGE RATINGS; (2) HAVE NO JOB PERFORMANCE
       OBJECTIVE BELOW AVERAGE, AND (3) NO MORE THAN ONE WRITTEN REPRIMAND FROM
       THE CLERK WITHIN TWO YEARS IMMEDIATELY PRECEDING APPLICATION FOR
       SELECTION;

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

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

Screen 2 of 6



```
MCCQ-B                          COIN BUDGET REQUEST                11/30/2017 15:35
V.10272017 FY: 2019 LOC: 001 OFF: 773 ACCOMACK COUNTY

     CERTIFICATION OF CAREER DEVELOPMENT FOR DEPUTY CLERK OF THE CIRCUIT COURT

 THE CAREER DEVELOPMENT PLAN FOR DEPUTY CLERKS CURRENTLY IN EFFECT FOR THIS
 OFFICE INCORPORATES THE FOLLOWING CRITERIA:

    E. THE DEPUTY CLERK MUST HAVE ACHIEVED THE MASTER DEPUTY
       CLERK DESIGNATION FROM THE VCCA CERTIFICATION REVIEW COMMITTEE AND
       A MINIMUM OF 60 ACCREDITED CONTACT HOURS OF INSTRUCTION HAVE BEEN
       ACHIEVED AS WELL AS A MINIMUM OF 10 HOURS OF ANNUAL ACCREDITED CONTACT
       HOURS OF INSTRUCTION HAVE BEEN ACHIEVED AFTER THE INITIAL 60 HOURS WERE
       EARNED;

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

    G. EQUAL OPPORTUNITY FOR ALL DEPUTIES;

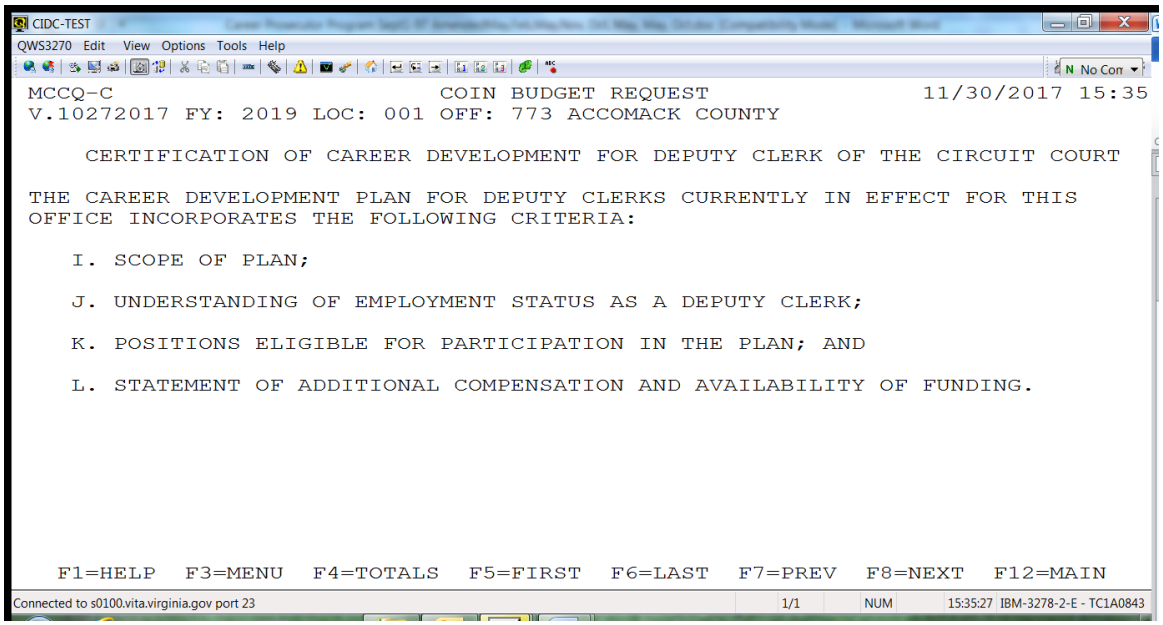
    H. STATEMENT OF PURPOSE;

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

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

Option #9, Special Program Certification

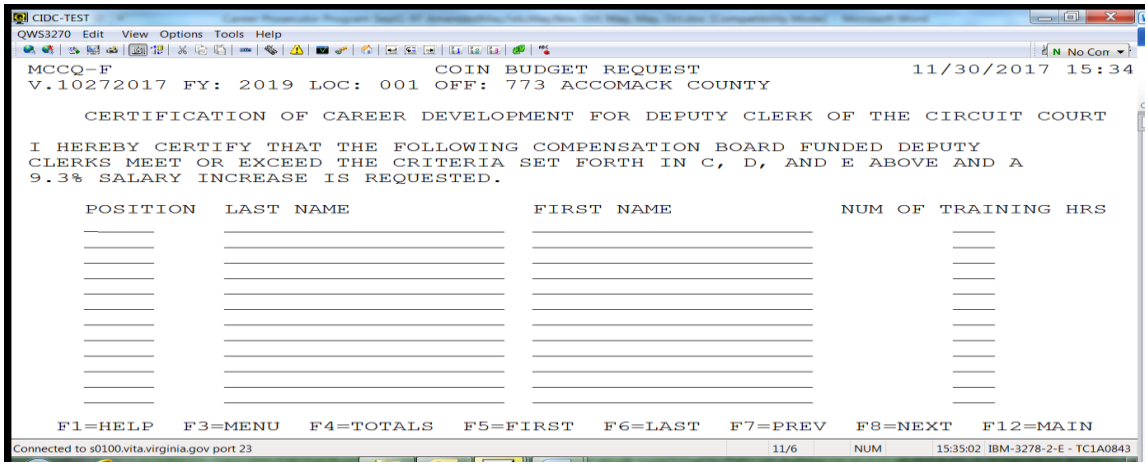
Screen 3 of 6



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

Option #9, Special Program Certification

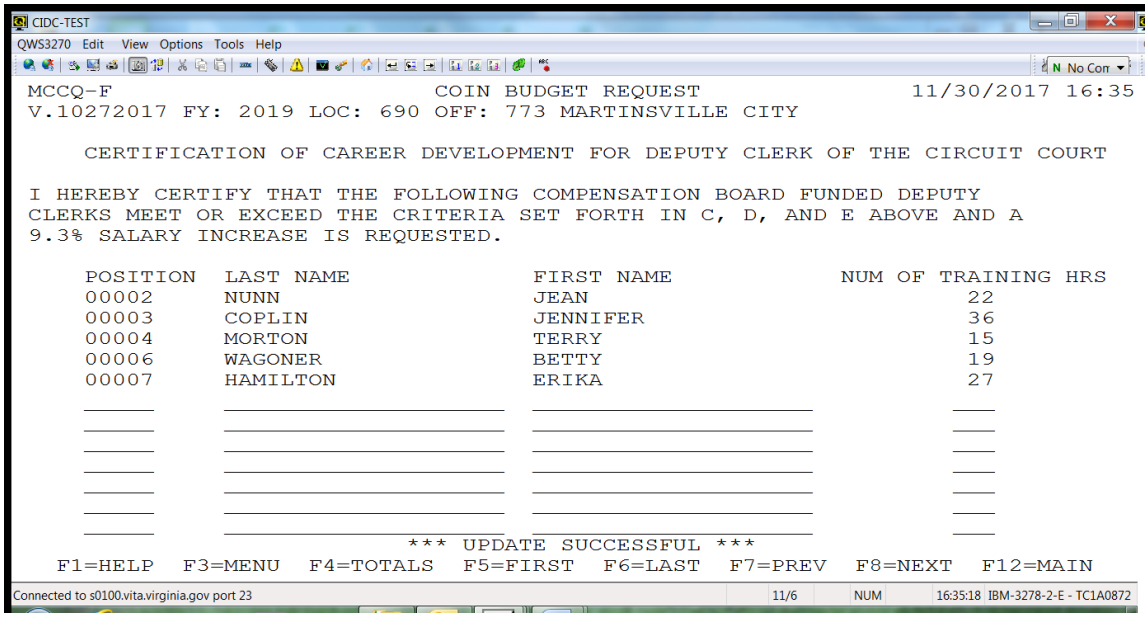
Screen 4 of 6



Enter the "POSITION NUMBER" for each employee who is a sworn Deputy Clerk and for whom you seek a 9.3% pay increase **or any deputy who has already received the increase and maintained the certification**:

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

Screen 5 of 6



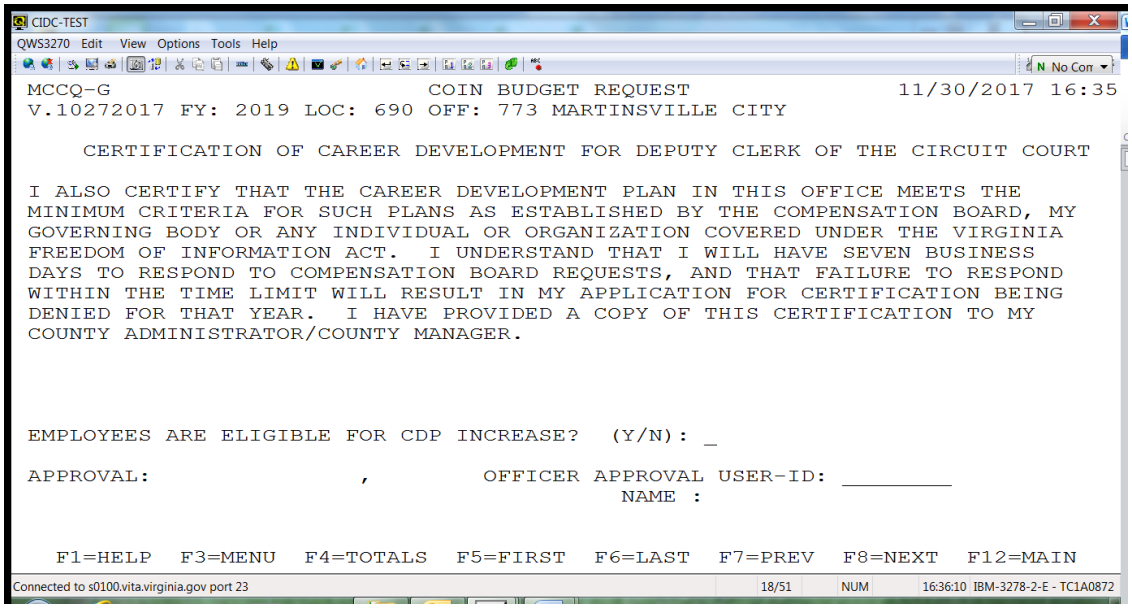
Press 'F8' to proceed to the next page

<u>Helpful Hints</u>

- Only VCCA certified deputies should be on this page.
- This page **is not** for deputies that are simply participating and enrolled.
- VCCA certified deputies must complete 60 hours of instruction of contact course work for initial certification and 10 hours annual for recertification

Option #9, Special Program Certification

Screen 6 of 6



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

11. Option #10 - Certify Budget Request

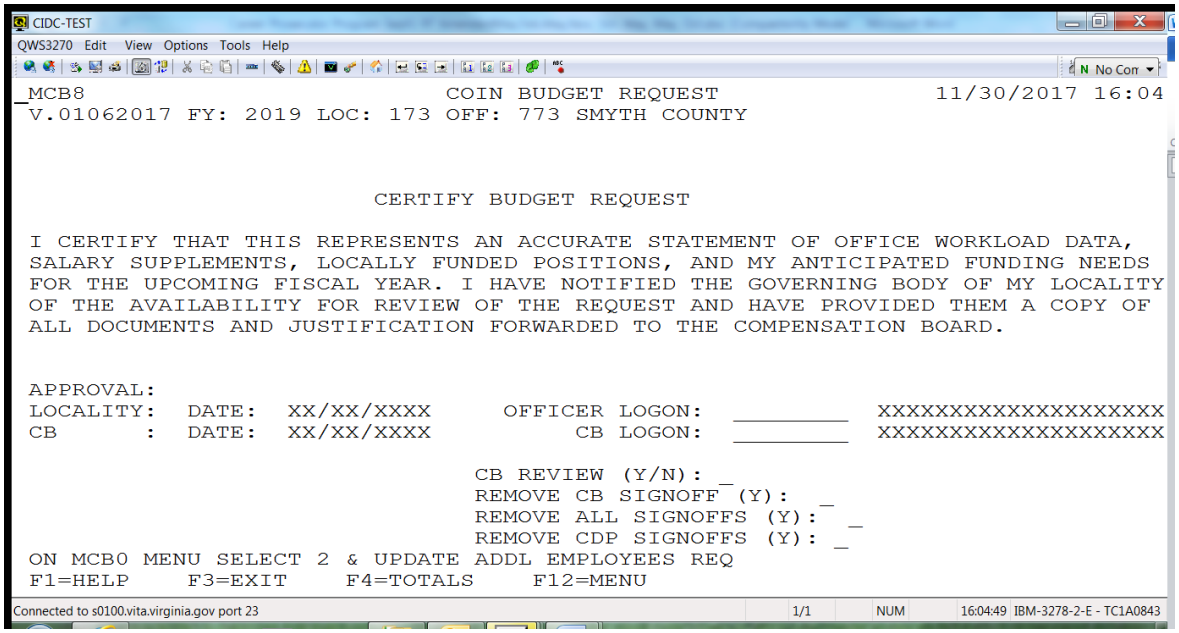
Purpose:

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

Navigational Path:

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

CLERK'S



```
CIDC-TEST
QWS3270  Edit  View  Options  Tools  Help
_MCB8                          COIN BUDGET REQUEST                11/30/2017 16:04
V.01062017 FY: 2019 LOC: 173 OFF: 773 SMYTH COUNTY


                        CERTIFY BUDGET REQUEST

I CERTIFY THAT THIS REPRESENTS AN ACCURATE STATEMENT OF OFFICE WORKLOAD DATA,
SALARY SUPPLEMENTS, LOCALLY FUNDED POSITIONS, AND MY ANTICIPATED FUNDING NEEDS
FOR THE UPCOMING FISCAL YEAR. I HAVE NOTIFIED THE GOVERNING BODY OF MY LOCALITY
OF THE AVAILABILITY FOR REVIEW OF THE REQUEST AND HAVE PROVIDED THEM A COPY OF
ALL DOCUMENTS AND JUSTIFICATION FORWARDED TO THE COMPENSATION BOARD.

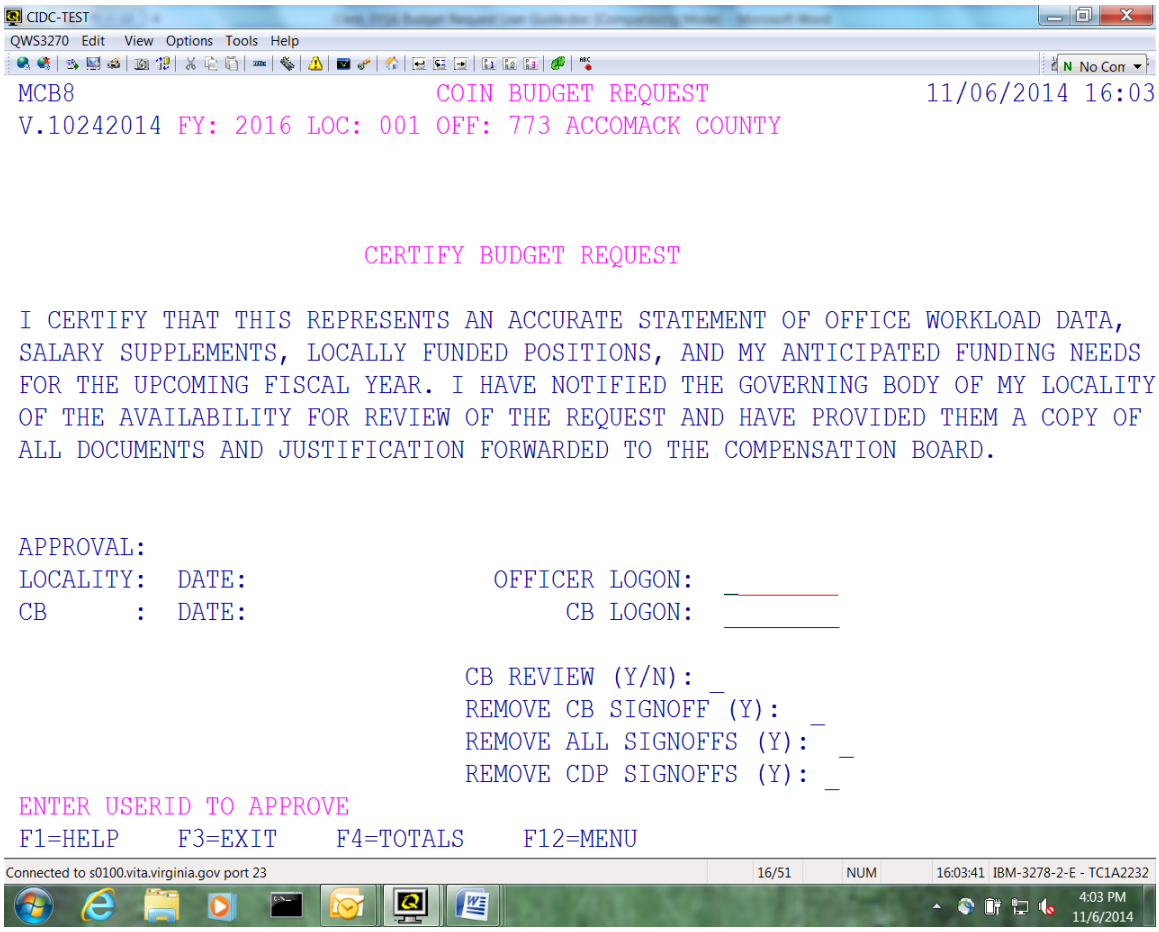

APPROVAL:
LOCALITY:  DATE:  XX/XX/XXXX     OFFICER LOGON:  _________  XXXXXXXXXXXXXXXXXXXX
CB       :  DATE:  XX/XX/XXXX          CB LOGON:  _________  XXXXXXXXXXXXXXXXXXXX

                              CB REVIEW (Y/N): _
                              REMOVE CB SIGNOFF (Y): _
                              REMOVE ALL SIGNOFFS (Y): _
                              REMOVE CDP SIGNOFFS (Y): _
ON MCB0 MENU SELECT 2 & UPDATE ADDL EMPLOYEES REQ
F1=HELP    F3=EXIT    F4=TOTALS    F12=MENU
Connected to s0100.vita.virginia.gov port 23   1/1   NUM   16:04:49  IBM-3278-2-E - TC1A0843
```

Helpful Hints:

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

Option #10, Certify Budget Request



Helpful Hints (Continued):

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

Procedures:

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

12. Option #11, Comments

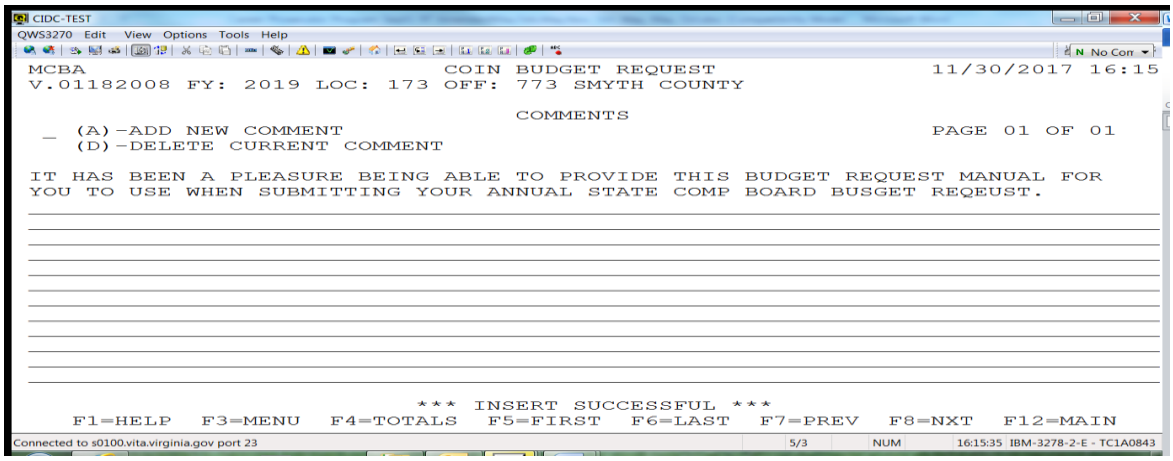
PURPOSE:

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

NAVIGATIONAL PATH:

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

CLERK'S



HELPFUL HINTS:

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

PROCEDURES:

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

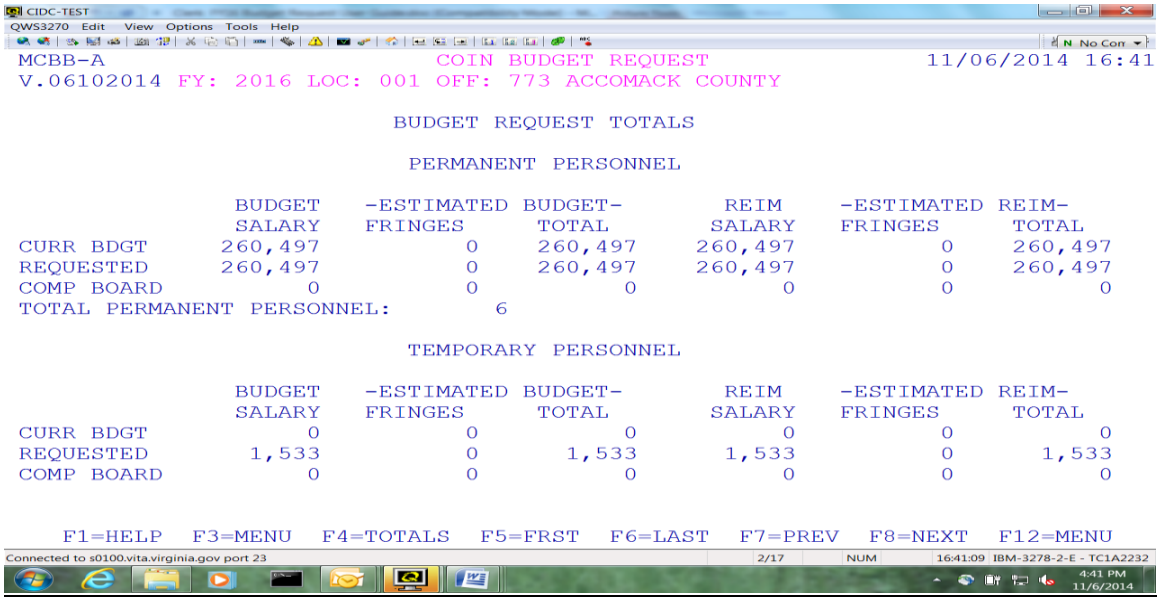
13. Function Key 'F4' - Budget Request Totals

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                 11/06/2014 16:41
V.06102014 FY: 2016 LOC: 001 OFF: 773 ACCOMACK COUNTY

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-       REIM     -ESTIMATED REIM-
                 SALARY    FRINGES     TOTAL        SALARY   FRINGES     TOTAL
CURR BDGT       260,497          0    260,497     260,497          0    260,497
REQUESTED       260,497          0    260,497     260,497          0    260,497
COMP BOARD            0          0          0           0          0          0
TOTAL PERMANENT PERSONNEL:       6

                               TEMPORARY PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-       REIM     -ESTIMATED REIM-
                 SALARY    FRINGES     TOTAL        SALARY   FRINGES     TOTAL
CURR BDGT             0          0          0           0          0          0
REQUESTED         1,533          0      1,533       1,533          0      1,533
COMP BOARD            0          0          0           0          0          0

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

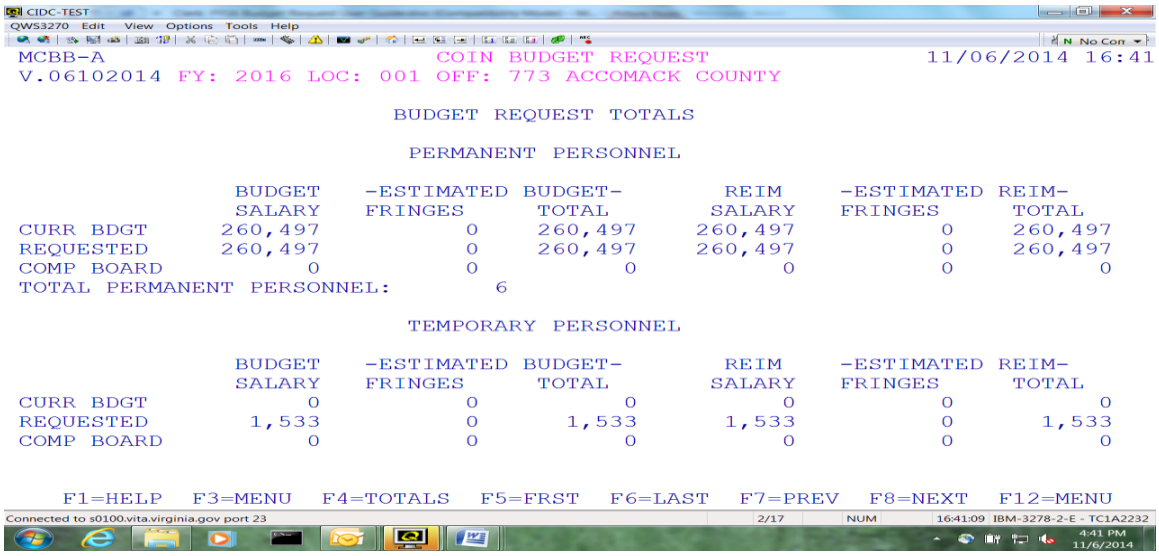
HELPFUL HINTS:

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

'F4' Budget Request Totals

CLERK'S

1ST SCREEN OF 3:



```
MCBB-A                          COIN BUDGET REQUEST                    11/06/2014 16:41
V.06102014 FY: 2016 LOC: 001 OFF: 773 ACCOMACK COUNTY

                              BUDGET REQUEST TOTALS

                               PERMANENT PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT      260,497           0    260,497      260,497          0    260,497
REQUESTED      260,497           0    260,497      260,497          0    260,497
COMP BOARD           0           0          0            0          0          0
TOTAL PERMANENT PERSONNEL:        6

                               TEMPORARY PERSONNEL

                 BUDGET    -ESTIMATED BUDGET-        REIM     -ESTIMATED REIM-
                 SALARY    FRINGES      TOTAL        SALARY   FRINGES      TOTAL
CURR BDGT            0           0          0            0          0          0
REQUESTED        1,533           0      1,533        1,533          0      1,533
COMP BOARD           0           0          0            0          0          0

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

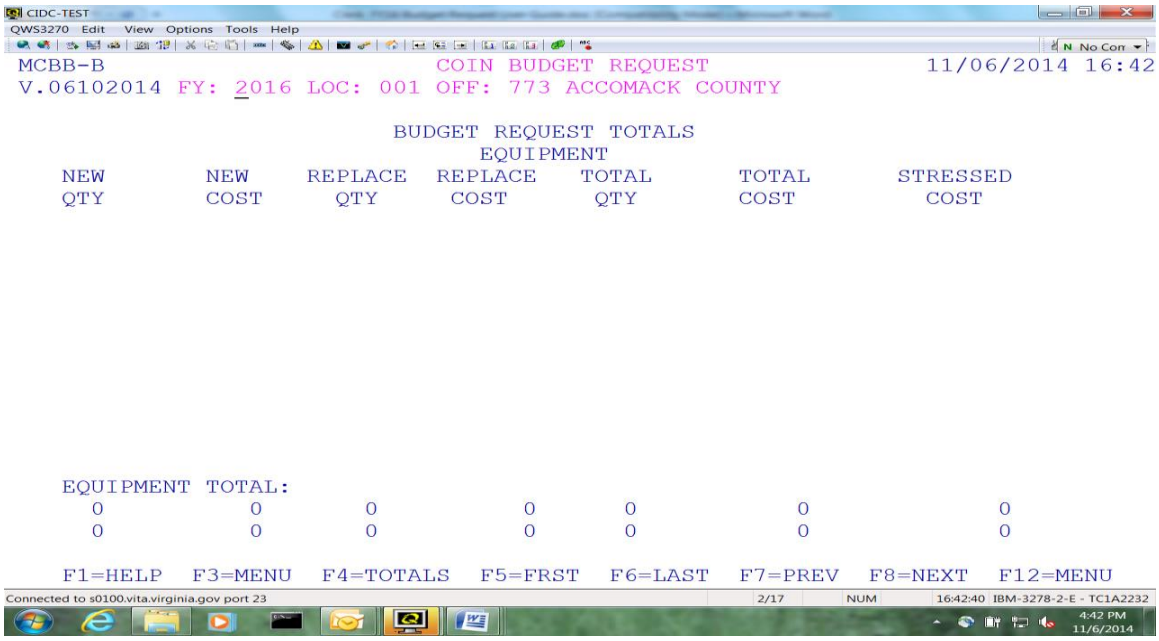
PROCEDURES:

- **1ST SCREEN OF 3:**
  - ✓ **'CURR BDGT'** – This line of information refers to the 'base' request information using your currently authorized budget information as of December 31st
  - ✓ **'REQUESTED'** – This line of information refers to the budget request that you have made or are in the process of making
    - This information is subject to change as you make revisions to your budget request
    - This information becomes 'locked-in' when the Constitutional Officer or designee certifies their budget request
  - ✓ **'COMP BOARD' -** This line of information refers to the budget request as being reviewed or approved by the Compensation Board
    - During the period of February – April budget requests made by the Constitutional Officers are reviewed and scrubbed by the Compensation Board
    - When budget requests are approved by the Compensation Board (May 1st of each year) this information also becomes 'locked-in'
  - ✓ **'FRINGE'** benefits listed are estimates only
  - ✓ **'REIMBURSABLE'** figures displayed are the actual dollar amounts that will be returned to your locality

'F4' Budget Request Totals

CLERK'S

2ND SCREEN OF 3:

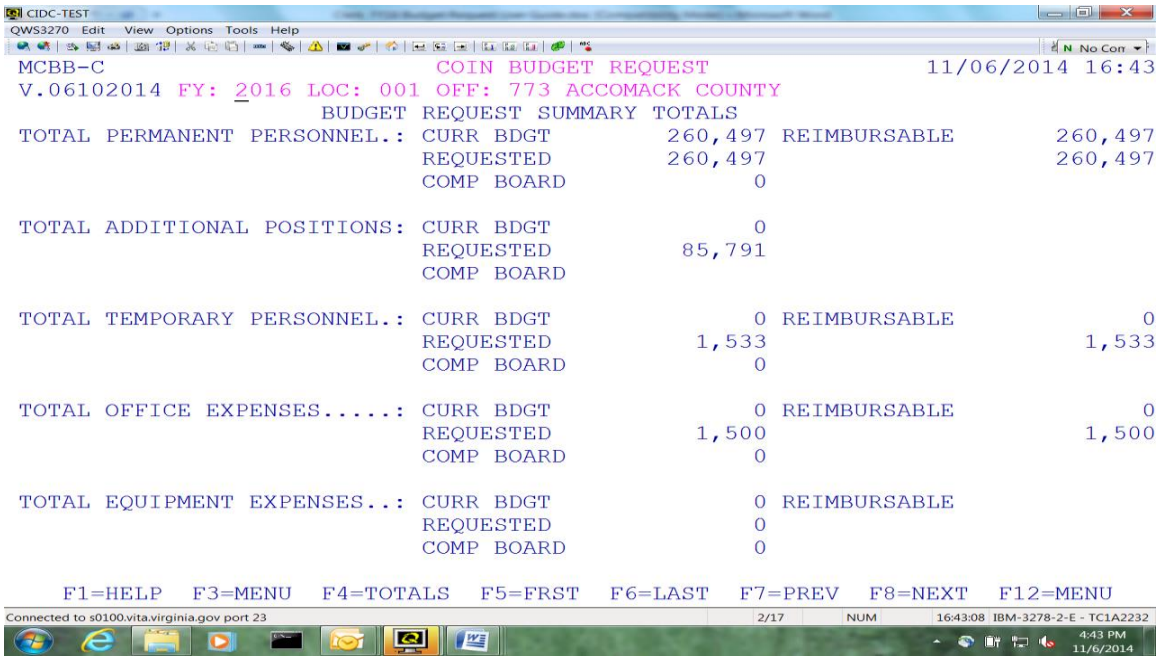


- **2ND SCREEN OF 3:**
  - ✓ This screen displays equipment totals by equipment category
  - ✓ **FIRST LINE** of information displayed relates to the request you have made or are in the process of making
    - This information is subject to change as you make revisions to your budget request
    - Line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

CLERK'S

3RD SCREEN OF 3:



```
MCBB-C                          COIN BUDGET REQUEST                 11/06/2014 16:43
V.06102014 FY: 2016 LOC: 001 OFF: 773 ACCOMACK COUNTY
                          BUDGET REQUEST SUMMARY TOTALS
TOTAL PERMANENT PERSONNEL.: CURR BDGT        260,497 REIMBURSABLE        260,497
                            REQUESTED        260,497                     260,497
                            COMP BOARD             0

TOTAL ADDITIONAL POSITIONS: CURR BDGT              0
                            REQUESTED         85,791
                            COMP BOARD

TOTAL TEMPORARY PERSONNEL.: CURR BDGT              0 REIMBURSABLE              0
                            REQUESTED          1,533                       1,533
                            COMP BOARD             0

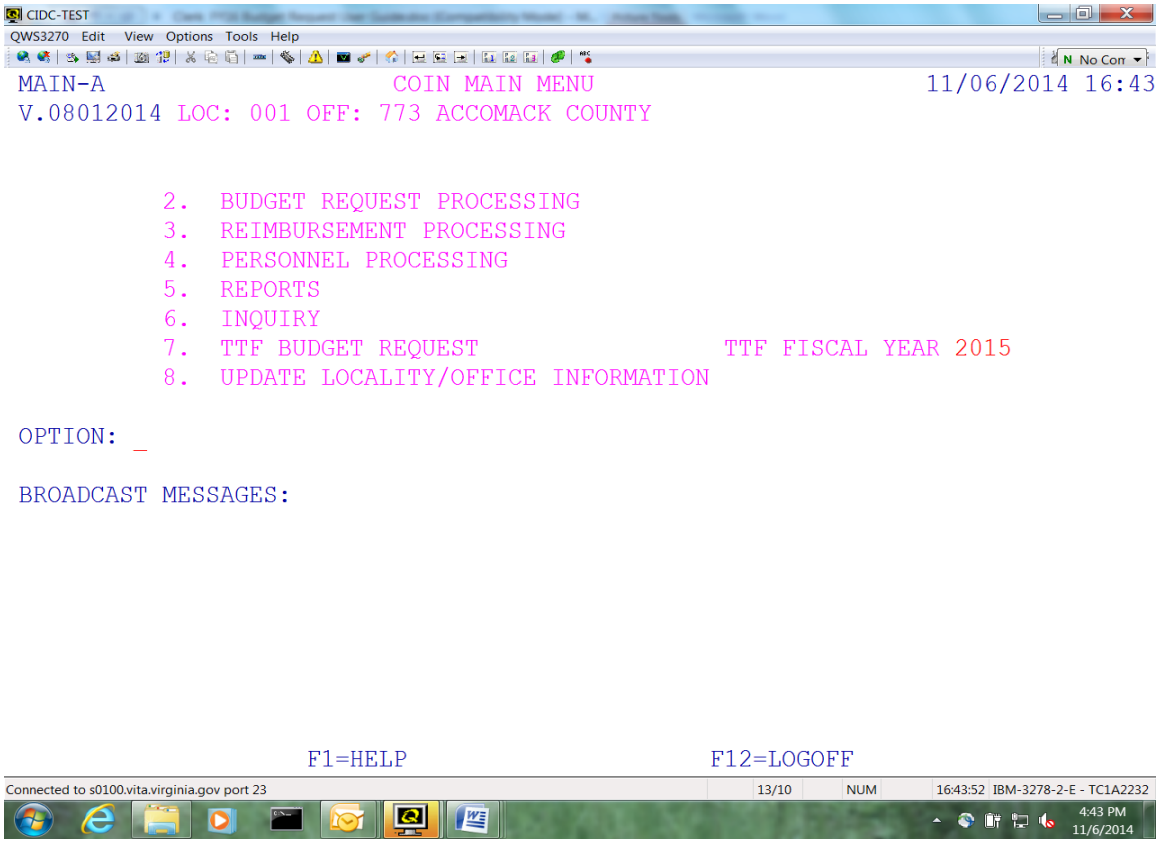
TOTAL OFFICE EXPENSES.....: CURR BDGT              0 REIMBURSABLE              0
                            REQUESTED          1,500                       1,500
                            COMP BOARD             0

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

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

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

14. Main Menu Option #5 - Budget Reports

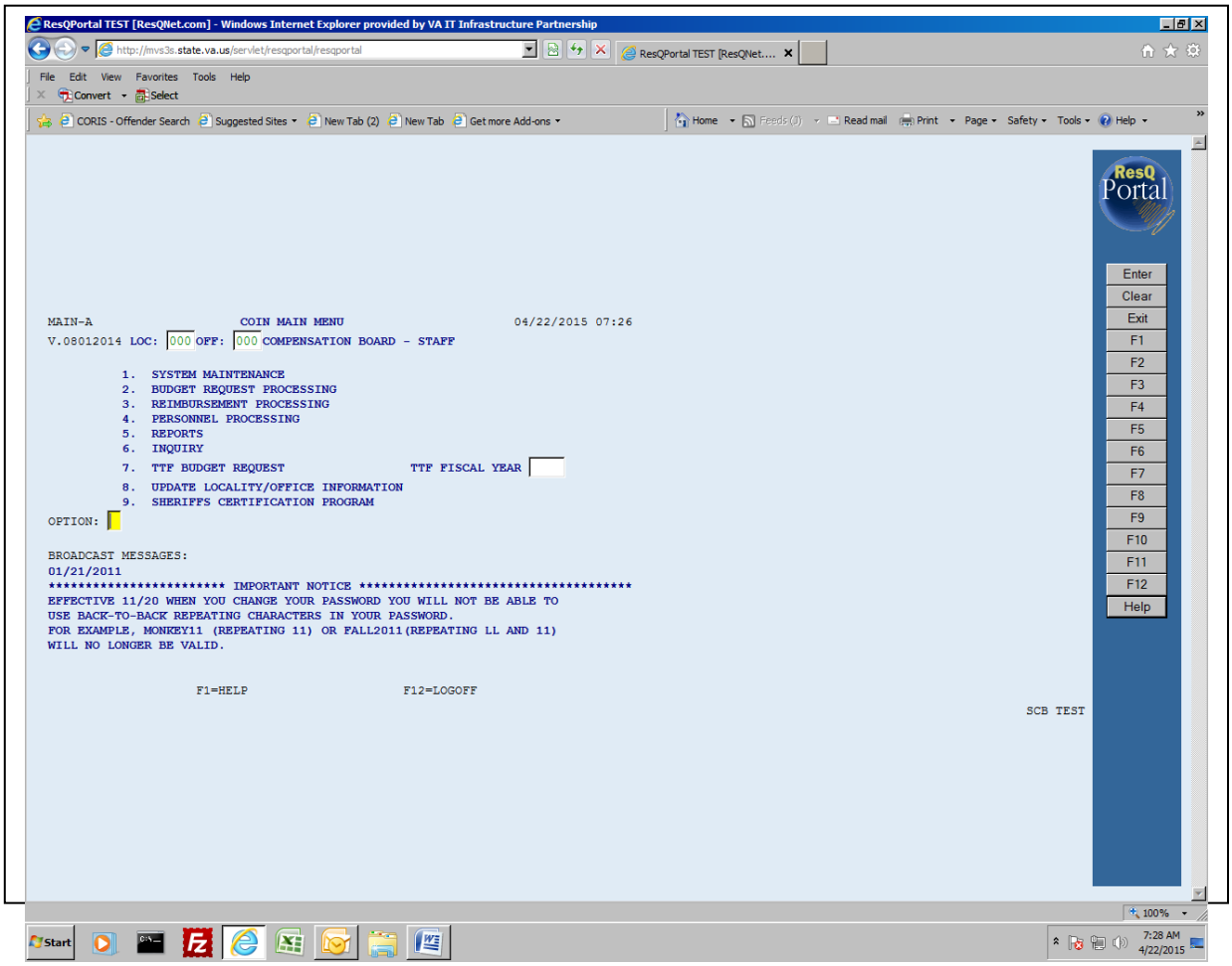


- **Select Option #5- "Reports"**

Main Menu Option #5 - Budget Reports

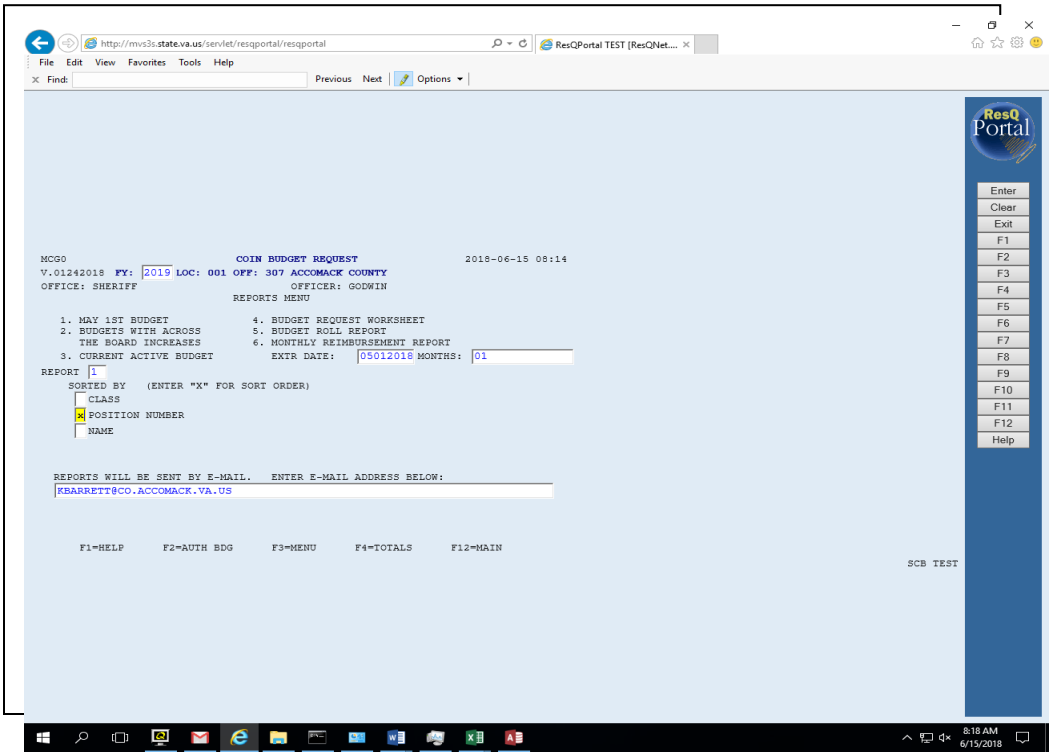
Downloading Budget Reports from COIN

Generating Reports in COIN



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

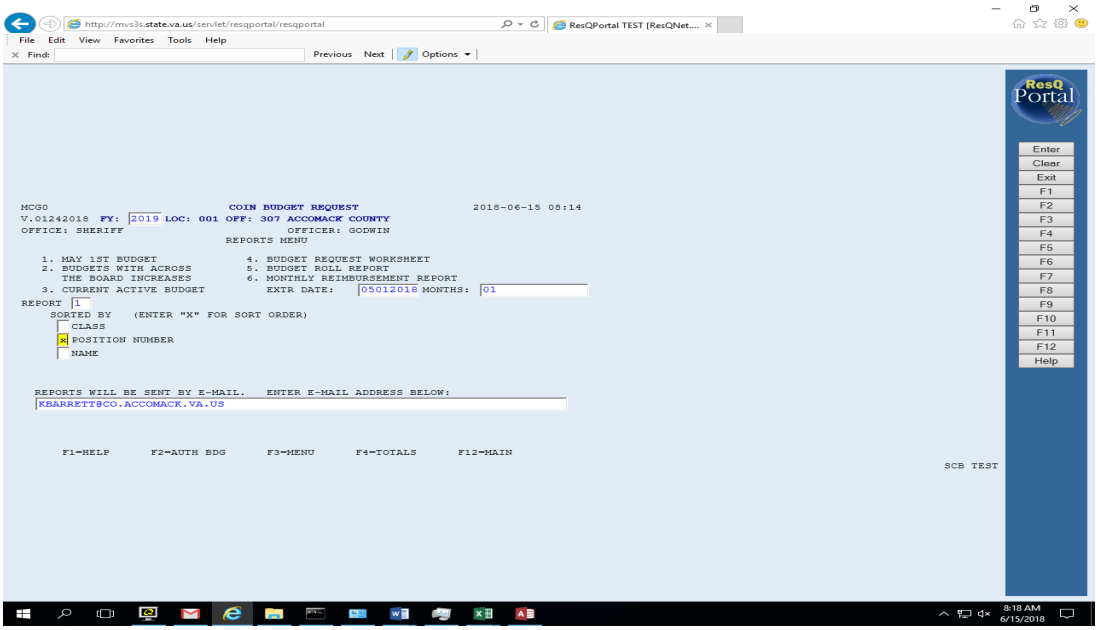
Main Menu Option #5 – Reports



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. This is the basis for the budget effective July 1 of each year. Note: Be sure to change **FY** at the top of the screen for the Budget "**ending"** year that you are requesting (i.e. FY20).
- **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 2022 (FY22 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.

Bill Fussell – william.fussell@scb.virginia.gov (All Offices)
Andy Waller – andy.waller@scb.virginia.gov (Treasurers, Finance Directors, Commonwealth's Attorneys)
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15. Appendix

Classifications and Pay Plans

CLERK'S

CLASSIFICATION AND PAY PLAN FOR SUPPORT PERSONNEL OF THE CLERK OF CIRCUIT COURT
JULY 1, 2020 - JUNE 30, 2021

CLASS TITLE	ABBREV	PAY BAND	ROLE	MIN	MAX*
MICROFILM TECHNICIAN	MT, MMT	1	Administrative	21,916	41,248
GENERAL OFFICE CLERK CLERK TYPIST II	GOC, MGOC CTII, MCTII				
DEPUTY CLERK I CASHIER	DCI, MDCI CASH, MCASH	2	Sr. Administrative	26,185	50,405
BOOKKEEPER SENIOR CLERK TYPIST	BKKR, MBKKR SCT, MSCT				
ACCOUNTING TECHNICIAN DEPUTY CLERK II	AT, MAT DCII, MDCII	4	Professional	31,305	64,373
DEPUTY CLERK III	DCIII, MDC3				
ADMINISTRATIVE ASSISTANT	AA, MAA				
DEPUTY CLERK IV	DCIV, MDCIV	7	Sr. Professional	37,401	84,076
ACCOUNTANT	ACCT, MACCT				
ASSISTANT CHIEF DEPUTY	ACD, MACD				
CHIEF DEPUTY CLERK I	CDCI, MCDCI	8	Supervisory/ Management	48,630	128,417
COMPTROLLER	COMP, MCOMP				
CHIEF DEPUTY CLERK II	CDCII, MCDC2				
CHIEF DEPUTY CLERK III	CDC3, MCDC3				

* 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.