

Constitutional Officers' Information Network (COIN) Budget Request Training

Agenda

9:30am Housekeeping

- a. Review of Handouts
- b. Do you have access to COIN?
 - i. It's okay if you don't, you can still learn from this class
 - ii. What to do to obtain access
- c. Who – Constitutional Officers, 6 Directors of Finance and Regional Jails
- d. What - This is the beginning of your new Annual Budget Process each year
- e. When –
 - i. Budgets are available Jan 1
 - ii. Budgets are Due Feb 1
- f. Why – This is your annual opportunity to define needs and ask for additional funding
- g. How – How to log into the COIN system
- h. Navigating around in COIN – F keys
- i. Get in the habit of pressing [Enter] to save
- j. Be thorough – go to every screen and update every screen

10:00am Budget Request Menu Options

1. Permanent Personnel
 - a. Sort by ____
 - b. Starting Position Number
2. Additional Employee Request
 - a. Prelisted Entry Level Classifications – Qty - must enter something
 - b. How to request positions that are above entry level
 - c. If you don't ask, you don't get
3. Temporary/Part-time
 - a. How to determine if you have "Base Temp" Funds
 - b. How to request additional funds
 - c. COIN Calculates additional funds
4. Full or Partially Funded Personnel
 - a. List names of people who are not in funded Perm Pers
 - b. How to Calculate hourly from salary
 - c. How to mark FUND SOURCE categories
 - d. If you have Base Temp Funds, required to mark CB on at least one line to demonstrate who you are claiming
 - e. How to list a position if you don't have a name
5. Office Expenses
 - a. How to determine if you have "Base Temp" Funds

- b. How to request additional funds
 - c. COIN Calculates additional funds
6. Equipment (Excluding Clerks)
- a. Clerks fill out their TTF Budget for Equipment in August each year
 - b. Review of Categories
 - i. A – Info Technology – Computer Hardware
 - ii. B – Office Equipment – Not Computers, but tools of the trade
 - iii. C – Furniture
 - 1. Conversion of PT/FT Commonwealth’s Attorneys
 - iv. D – Radio Equipment
 - c. How to fill out request for Equipment
 - i. Definition of ‘New’ vs. “Replacement”
 - ii. Description – general, not specific
 - iii. Unit Cost
 - iv. New Qty, Repl Qty
 - v. Total Cost
 - vi. Stressed Cost
7. Workload
- a. Helps to determine staffing levels
 - b. Specific to Office Type
 - c. Recording the number of transactions
 - d. Workload Definitions can be found in Budget Request Manual
 - e. Please reach out to your workload committee in your Association for additional help on the definitions
8. Update Locality Information
- a. Office Address
 - b. Officer Email – if you see a website listed, please update
 - c. Contact Person should be the primary person in your office who uses COIN
9. Special Program Certification
- a. Office Specific
 - i. Must be certified ‘Y’ in order to receive funding
 - ii. Go to every screen, take your time, answer all questions
 - iii. Most of the mistakes in the Budget Request are made here
 - b. Officer vs. Deputy (or Master Deputy)
 - c. Jail Expansion (Sheriffs Only)
10. Certify Budget Request
- a. Final Certification
 - b. Last step – no further changes can be made unless Certification Removed

- c. Only certify on the Officer Logon field (Officer Logon not required)
- d. There is no second signature approval on the Budget Request
- e. When you certify, you are agreeing to provide a copy of your Request to your Local Governing body.
 - i. Your second signature does have the ability to view and print your budget

11. Comments

- a. Free Text typing, but not like a word processor
- b. Hit Enter when finished typing on one page
- c. COIN allows more than one page of Comments

12. Printing Budget Reports

- a. Hit F4 from anywhere in Bud Req Menu – Totals – 3 page summary

13. Questions?

14. Adjourn