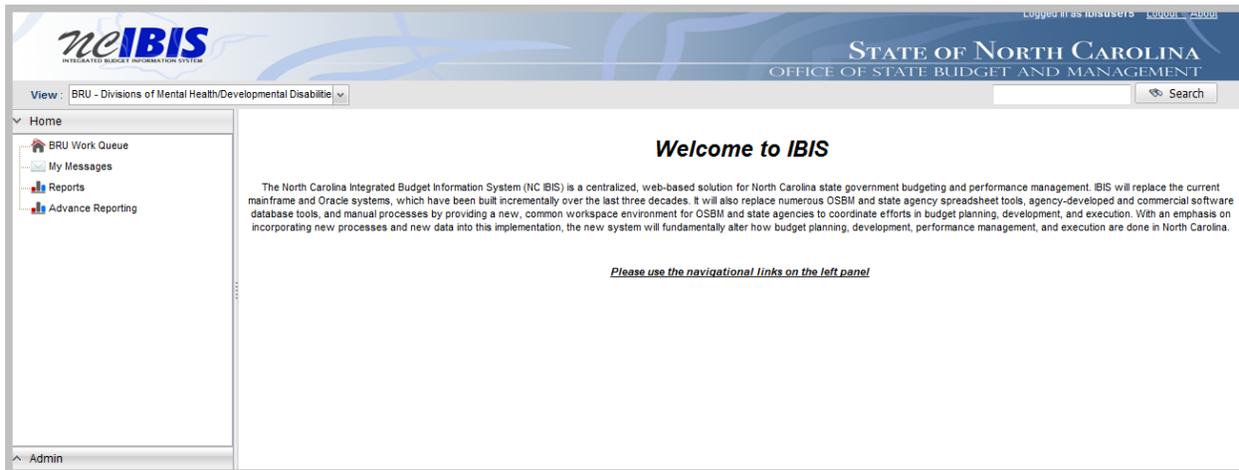


INTEGRATED BUDGET INFORMATION SYSTEM (IBIS) TRAINING GUIDE

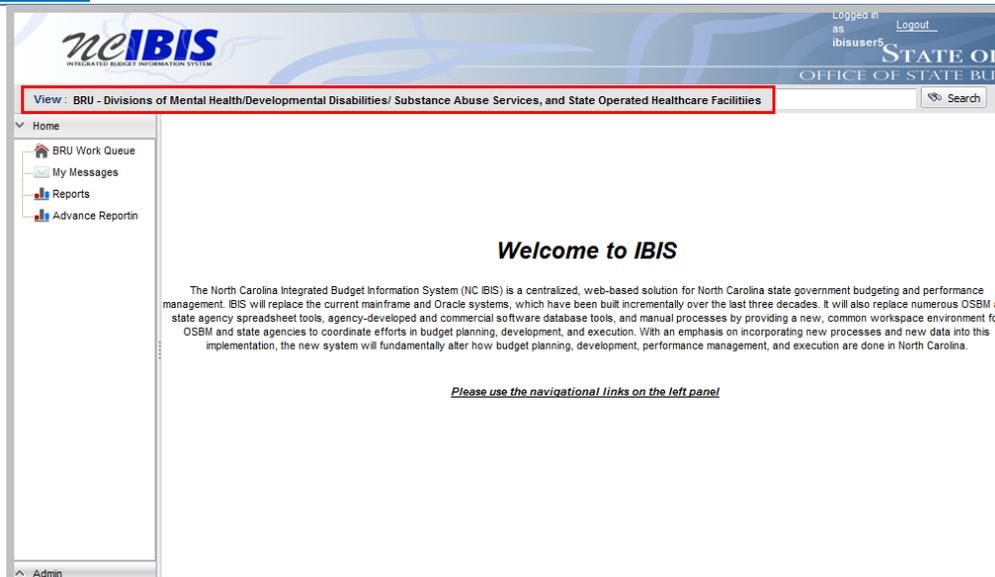
SECTION 1: WORKSHEET II



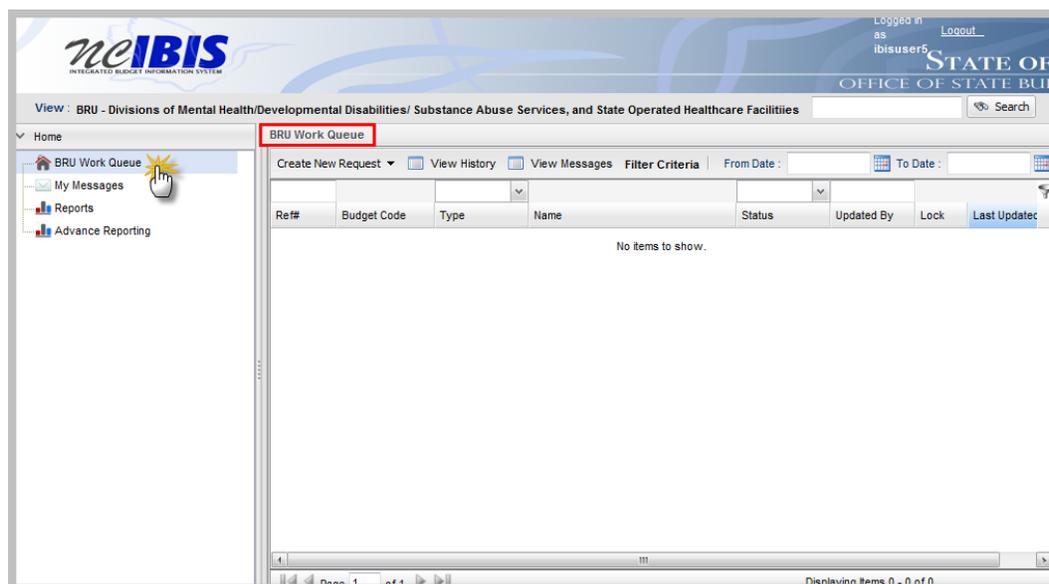
Step 1 (above): Once you have successfully logged in, you should see the above NC IBIS Home Page.

Step 2: Find the View drop-down list in the upper left-hand corner. Click on the drop-down arrow. The drop-down should contain only your BRU(s). If you have access to multiples, you will need to select one.





Step 3: Click on the BRU Work Queue in the left pane of the screen. (See the hand click image below.)



Step 3 Result (See above): The right pane of the window will display the BRU Work Queue, when one exists. In this case, there is nothing in the Work Queue yet, so the right pane shows only the label for the Work Queue – which you will be creating in the next few steps.

Step 4: Once requests are added, the queue will look like the following with the Requests shown in right pane:

View : BRU - Department of Cultural Resources

Home

- BRU Work Queue
- My Messages
- Reports
- Advance Reporting

BRU Work Queue

Create New Request View History View Messages Filter Criteria From Date :

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BA-7ME4	14800	Worksheet-I	Add a new DCR service	BRU Draft	ibisuser7		2012-10-25
BA-7MDU	14800	Worksheet-I	Add Request 2	BRU Draft	ibisuser7		2012-10-24
BA-7MDS	14800	Worksheet-I	Add a new Cultural entity	BRU Draft	ibisuser7		2012-10-24

Page 1 of 1

Display

Step 5: Click Create New Request drop-down, on the right pane of the window, as outlined in red:

ncIBIS STATE OF NORTH CAROLINA OFFICE OF STATE BUDGET AND MANAGEMENT

View : BRU - Divisions of Mental Health/Developmental Disabilities

Home

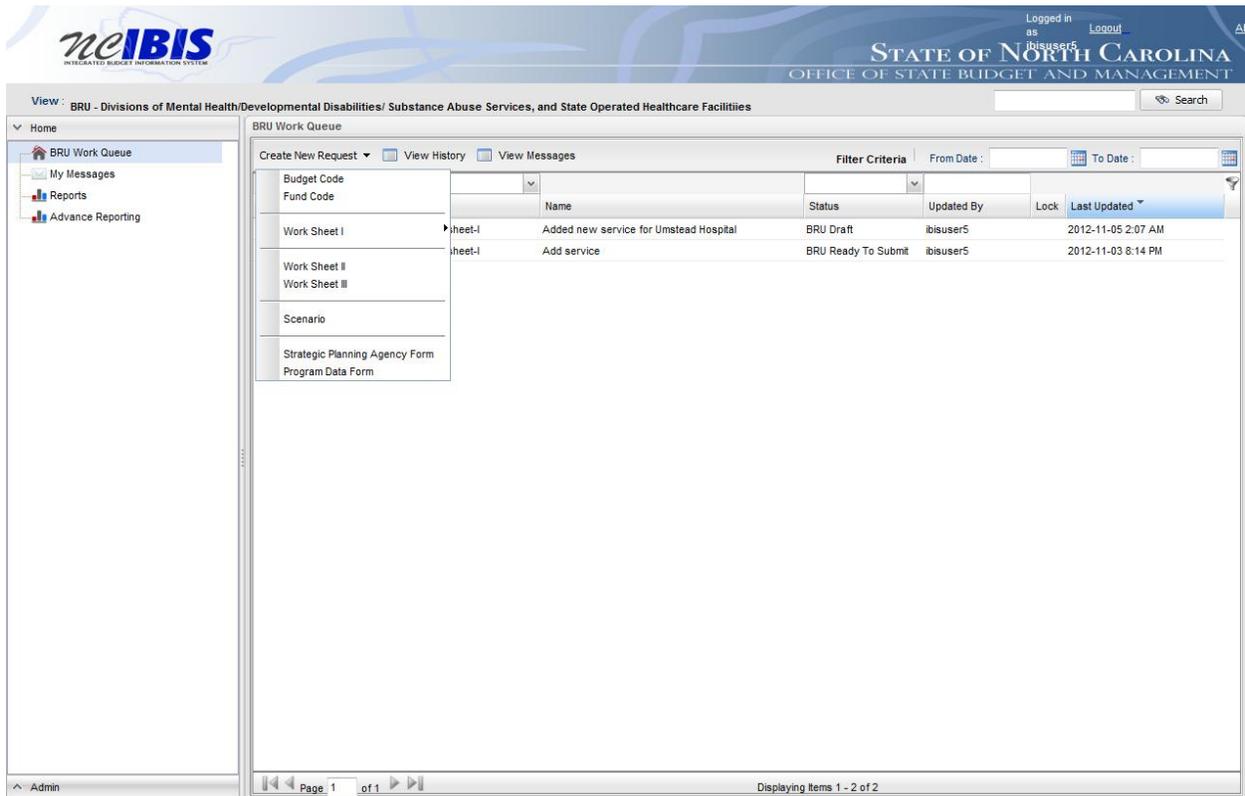
- BRU Work Queue
- My Messages
- Reports
- Advance Reporting

BRU Work Queue

Create New Request View History View Messages Filter Criteria From Date : To Date :

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
No items to show.							

Page 1

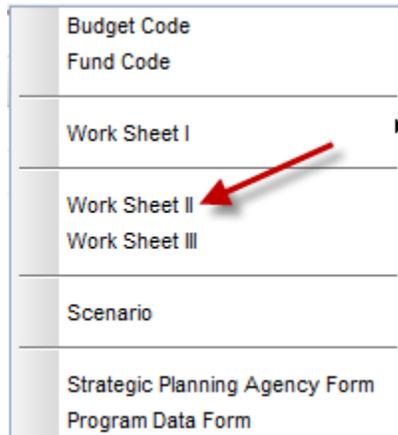


The screenshot shows the neIBIS interface for the BRU Work Queue. The header includes the neIBIS logo and the text "STATE OF NORTH CAROLINA OFFICE OF STATE BUDGET AND MANAGEMENT". The user is logged in as "ibisuser5". The main content area is titled "BRU Work Queue" and contains a table of requests. A dropdown menu is open under "Create New Request", showing options: "Work Sheet I", "Work Sheet II", "Work Sheet III", "Scenario", and "Strategic Planning Agency Form Program Data Form".

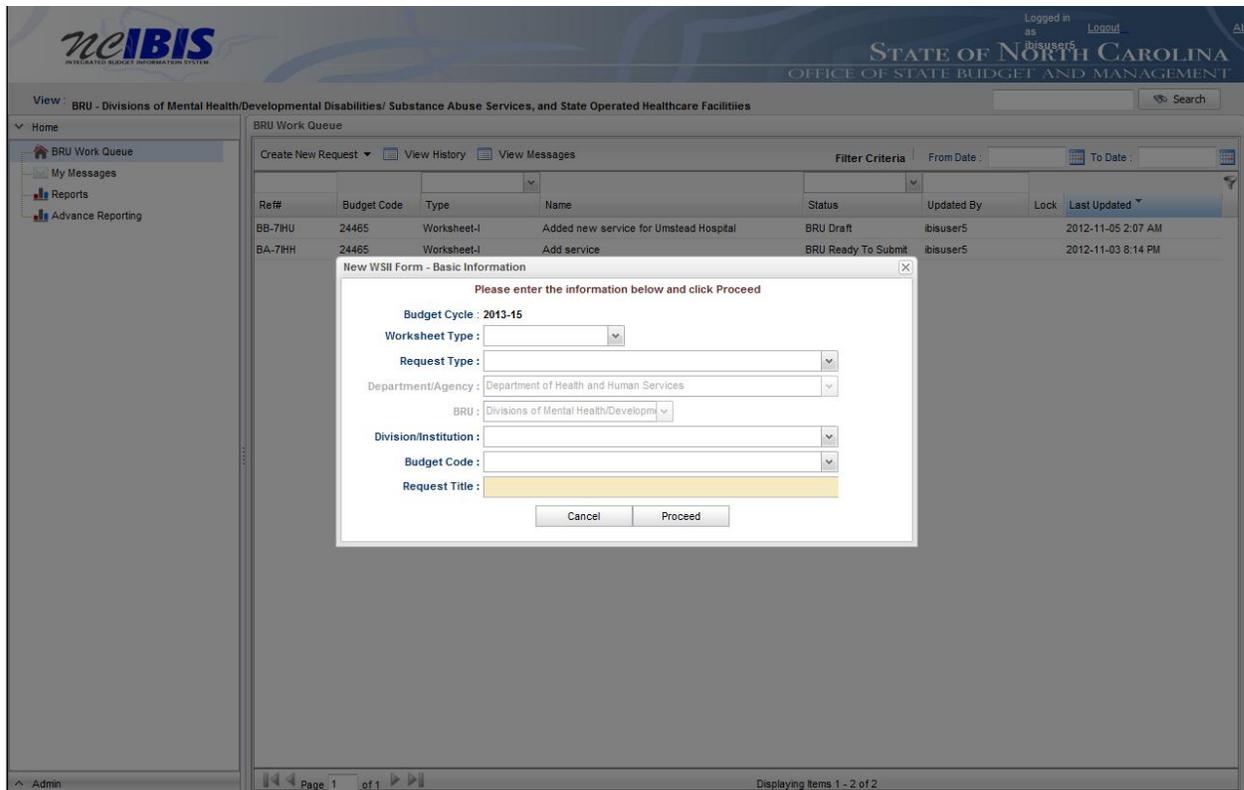
Budget Code	Fund Code	Name	Status	Updated By	Lock	Last Updated
		heet-I Added new service for Umstead Hospital	BRU Draft	ibisuser5		2012-11-05 2:07 AM
		heet-I Add service	BRU Ready To Submit	ibisuser5		2012-11-03 8:14 PM

Step 5 Result (above): When you click on 'Create New Request', the drop-down will display the following:

The sub-menu displays a Work Sheet II option



Step 6: Click on the Worksheet II option on the sub-menu (above).



The screenshot shows the neIBIS interface with a 'New WSII Form - Basic Information' dialog box open. The dialog box contains the following fields:

- Budget Cycle: 2013-15
- Worksheet Type: [Dropdown menu]
- Request Type: [Dropdown menu]
- Department/Agency: Department of Health and Human Services
- BRU: Divisions of Mental Health/Developm [Dropdown menu]
- Division/Institution: [Dropdown menu]
- Budget Code: [Dropdown menu]
- Request Title: [Text input field, highlighted in yellow]

Buttons for 'Cancel' and 'Proceed' are located at the bottom of the dialog box.

Step 6 Result (above): You will see a New WSII Form – Basic Information window.

Step 7: The initial non-editable field displays the current Budget Cycle years

Step 8: The second field, Worksheet Type is a dropdown list box displaying two options, Increase and Decrease

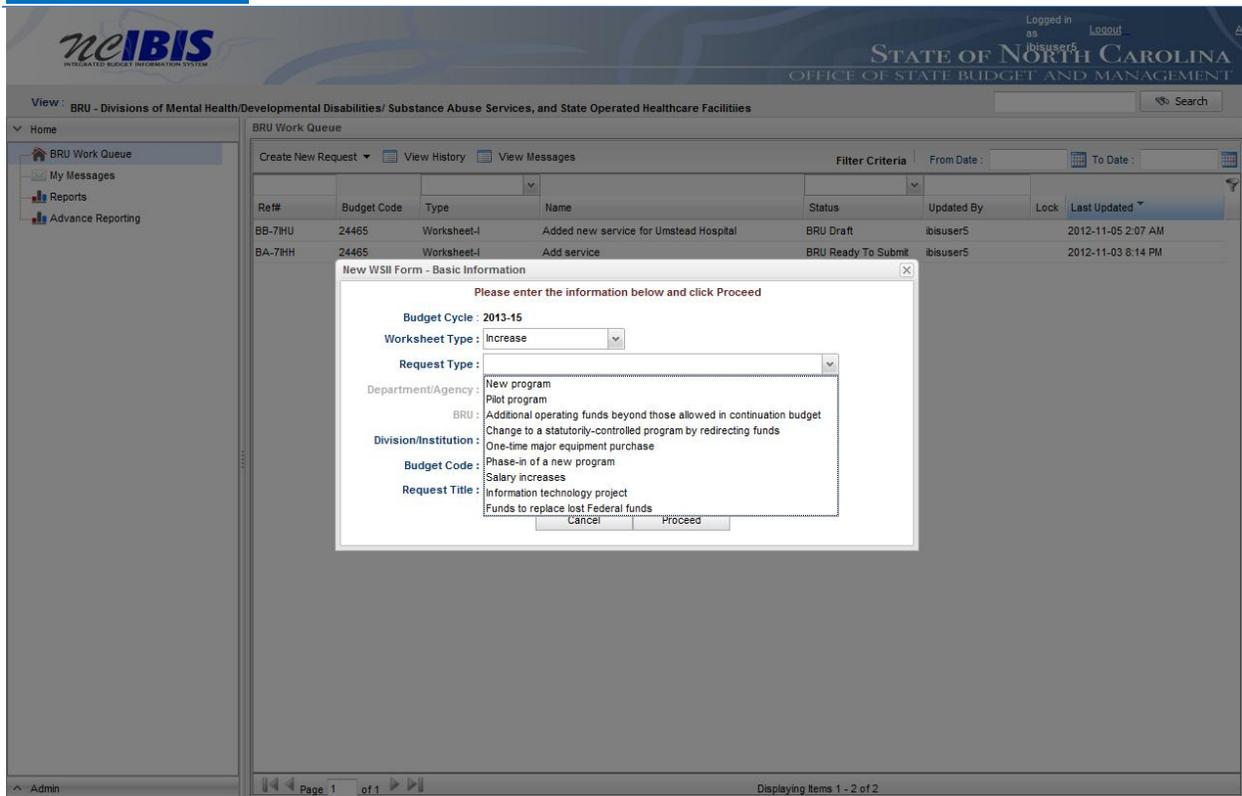
The screenshot shows the neIBIS interface for the BRU Work Queue. A modal dialog box titled "New WSII Form - Basic Information" is open, prompting the user to enter information. The dialog contains the following fields:

- Budget Cycle: 2013-15
- Worksheet Type: [dropdown menu]
- Request Type: [dropdown menu with "Increase" and "Decrease" options visible]
- Department/Agency: Department of Health and Human Services
- BRU: Divisions of Mental Health/Developm
- Division/Institution: [dropdown menu]
- Budget Code: [dropdown menu]
- Request Title: [text input field]

Buttons for "Cancel" and "Proceed" are located at the bottom of the dialog. A red arrow points to the "Request Type" dropdown menu.

Step 8 Result (above): Make the appropriate selection from the Worksheet Type dropdown list. The word Increase or Decrease will populate the field and the dropdown list will disappear

Step 9: The third field, Request Type, is a dropdown list box many options relevant to Worksheet II requests.



The screenshot shows the neIBIS interface for the BRU Work Queue. A dialog box titled "New WSII Form - Basic Information" is open, prompting the user to enter information and click "Proceed". The dialog contains the following fields and options:

- Budget Cycle: 2013-15
- Worksheet Type: Increase
- Request Type: (Dropdown menu)
- Department/Agency: (Dropdown menu)
- BRU: Additional operating funds beyond those allowed in continuation budget
- Division/Institution: Change to a statutorily-controlled program by redirecting funds
- Budget Code: One-time major equipment purchase
- Request Title: Phase-in of a new program
- Request Title: Salary increases
- Request Title: Information technology project
- Request Title: Funds to replace lost Federal funds

Buttons for "Cancel" and "Proceed" are visible at the bottom of the dialog.

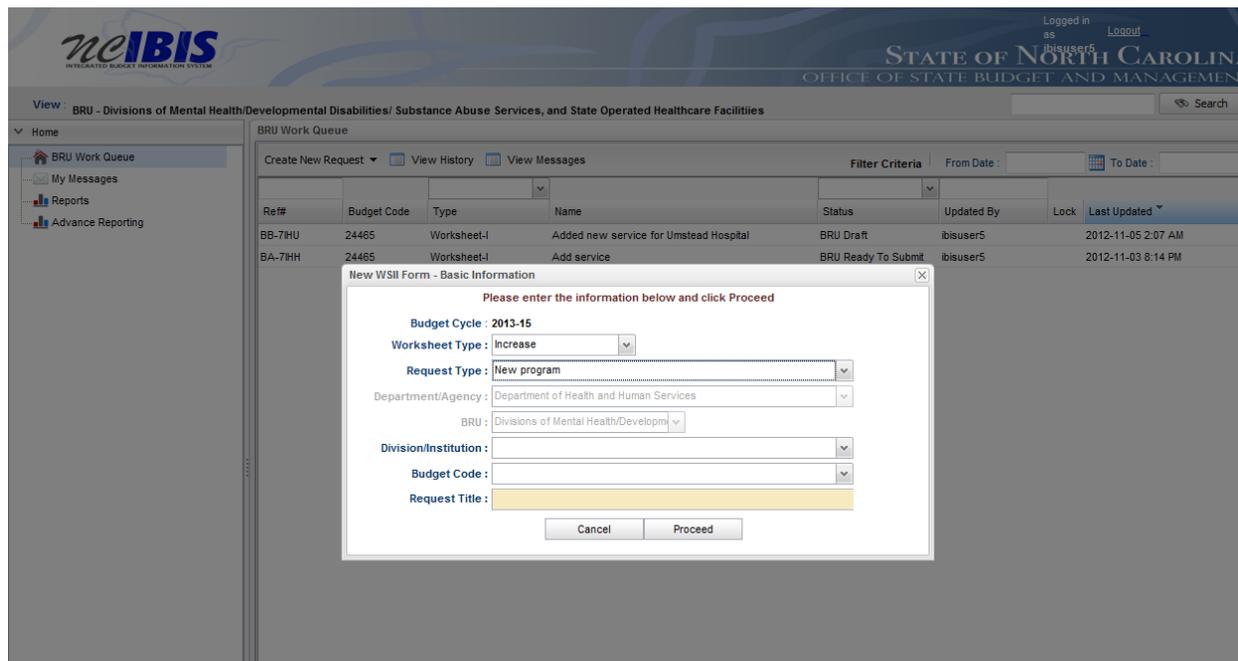
Step 10: The options in this list will vary for Increases and Decreases and these options may change with every budget cycle. At this time, the Increase list contains the following options:

- New program
- Pilot program
- Additional operating funds beyond those allowed in continuation budget
- Change to a statutorily-controlled program by redirecting funds
- One-time major equipment purchase
- Phase-in of a new program
- Salary increases
- Information technology project
- Funds to replace lost Federal funds

And the Decrease list contains the following options:

- Eliminating a duplicative program
- Eliminating an underperforming program
- Consolidating a program, office or service
- Reducing operating funds due to service inefficiencies
- Reducing layers of management and administration
- Budgeting receipts to offset appropriation requirements
- Other reduction

Step 11: Select the Increase/Decrease option appropriate to the Worksheet II you wish to create.

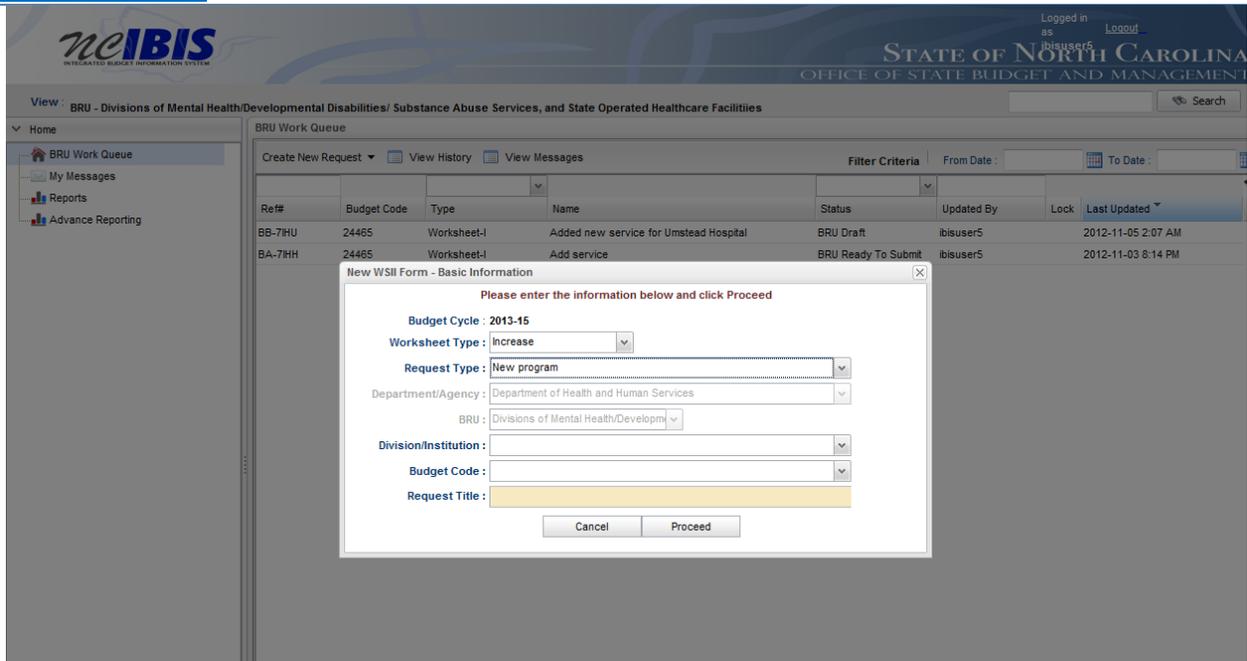


Step 11 Result (above): The selection will populate the Request Type field and the dropdown box will disappear.

Step 12: The fourth field, Department/Agency, is pre-populated with the Department/Agency that you represent as an authorized IBIS user. Should you be authorized for more than one Department/Agency, this would present a dropdown list of all appropriate Department/Agencies.

Step 13: The fifth field, BRU, is pre-populated to display the Budget Reporting Unit that you represent as an authorized IBIS user. Should you be authorized for more than one BRU, this would present a dropdown list of all appropriate Department/Agencies.

Step 14: Accept the default selections for Department/Agency and BRU or select the desired choices from the dropdown lists presented.

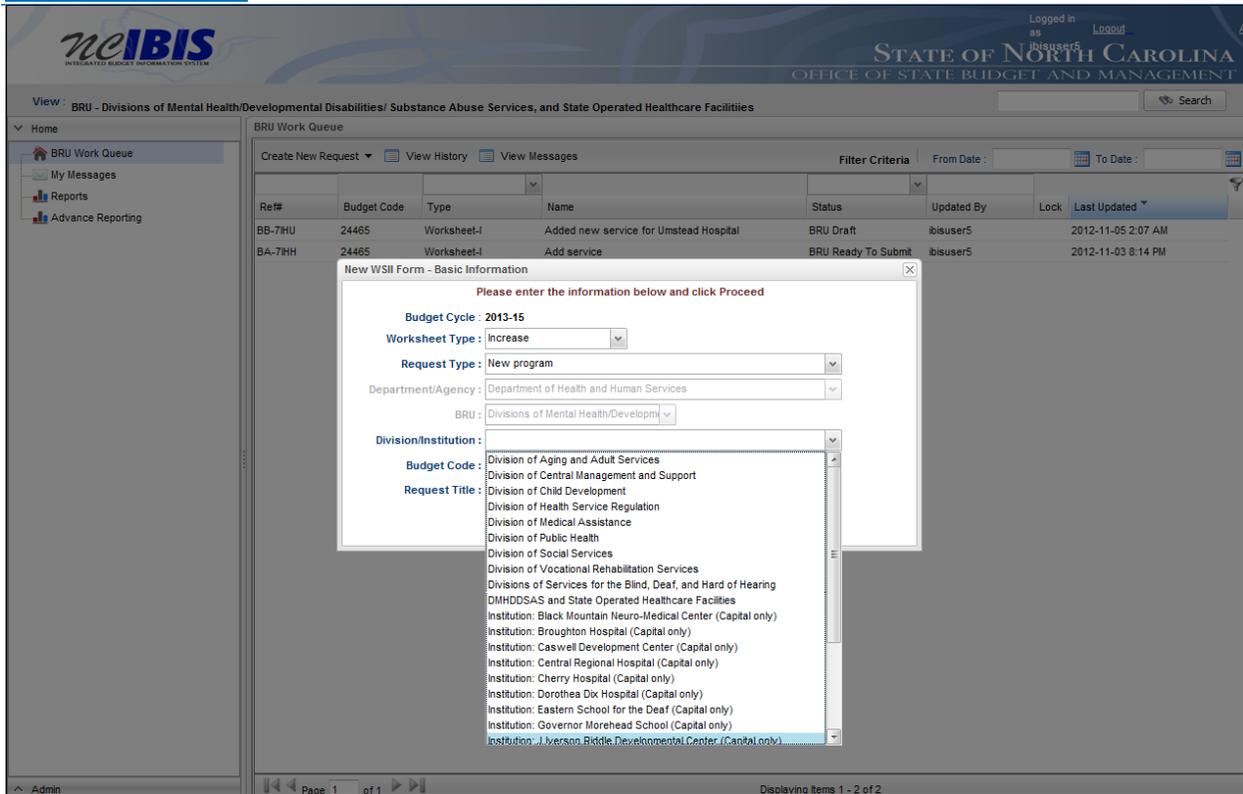


The screenshot shows the ncIBIS web application interface. At the top, it displays the ncIBIS logo and the text 'STATE OF NORTH CAROLINA OFFICE OF STATE BUDGET AND MANAGEMENT'. The user is logged in as 'ibisuser5'. The main content area shows a 'BRU Work Queue' table with columns for Ref#, Budget Code, Type, Name, Status, Updated By, Lock, and Last Updated. Two rows are visible: one for 'Added new service for Umstead Hospital' and another for 'Add service'. A 'New WSII Form - Basic Information' dialog box is open in the foreground, prompting the user to enter information. The dialog box contains the following fields:

- Budget Cycle: 2013-15
- Worksheet Type: Increase
- Request Type: New program
- Department/Agency: Department of Health and Human Services
- BRU: Divisions of Mental Health/Developm
- Division/Institution: (empty dropdown)
- Budget Code: (empty dropdown)
- Request Title: (empty text field, highlighted in yellow)

Buttons for 'Cancel' and 'Proceed' are located at the bottom of the dialog box.

Step 15: The sixth field, Division/Institution, is a dropdown list that displays the Division/Institutions that you represent as an authorized IBIS user and given the selected Department/Agency and BRU. Should you be authorized for more than one Division/Institution, this would present a dropdown list of all appropriate Division/Institutions.



View: BRU - Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities

BRU Work Queue

Create New Request View History View Messages Filter Criteria From Date: To Date:

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-7HU	24465	Worksheet-I	Added new service for Umstead Hospital	BRU Draft	ibuser5		2012-11-05 2:07 AM
BA-7HH	24465	Worksheet-I	Add service	BRU Ready To Submit	ibuser5		2012-11-03 8:14 PM

New WSII Form - Basic Information

Please enter the information below and click Proceed

Budget Cycle : 2013-15

Worksheet Type : Increase

Request Type : New program

Department/Agency : Department of Health and Human Services

BRU : Divisions of Mental Health/Developm

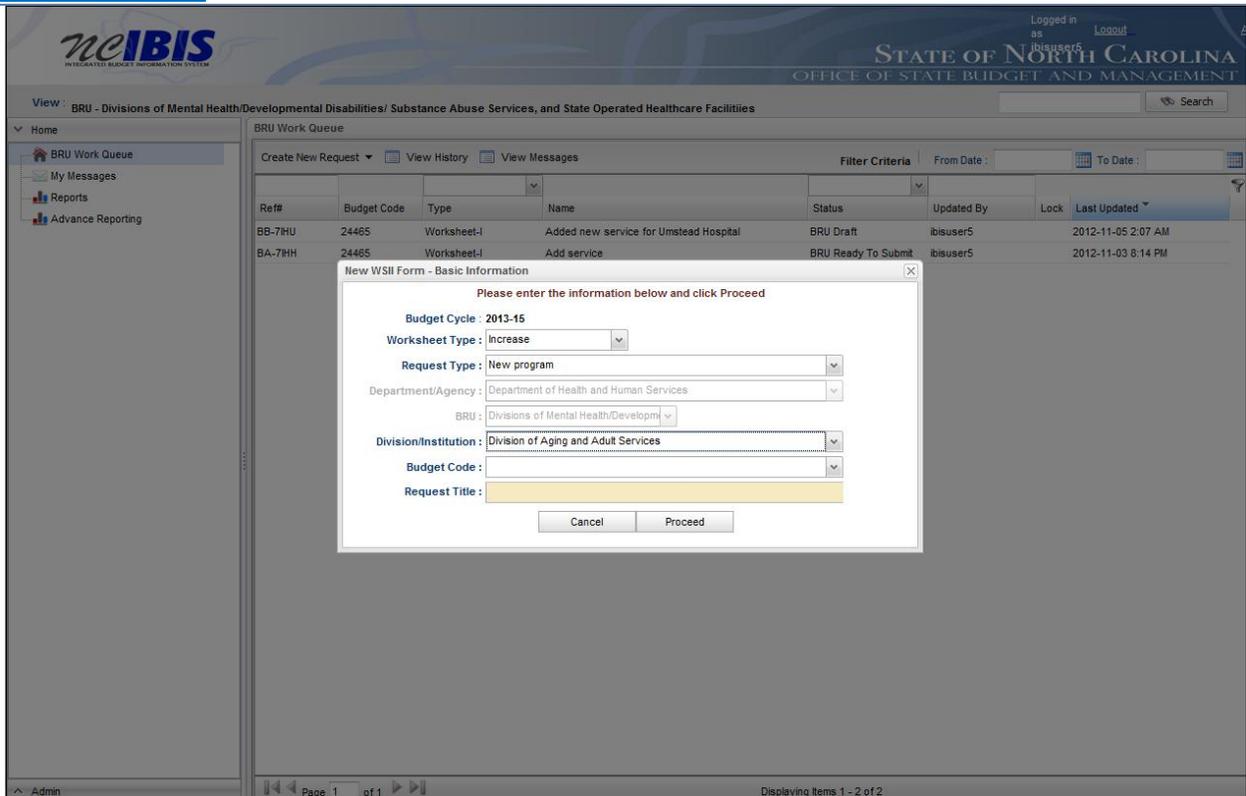
Division/Institution :

- Budget Code : Division of Aging and Adult Services
- Request Title : Division of Central Management and Support
- Division of Child Development
- Division of Health Service Regulation
- Division of Medical Assistance
- Division of Public Health
- Division of Social Services
- Division of Vocational Rehabilitation Services
- Divisions of Services for the Blind, Deaf, and Hard of Hearing
- DMHDDSAS and State Operated Healthcare Facilities
- Institution: Black Mountain Neuro-Medical Center (Capital only)
- Institution: Broughton Hospital (Capital only)
- Institution: Caswell Development Center (Capital only)
- Institution: Central Regional Hospital (Capital only)
- Institution: Cherry Hospital (Capital only)
- Institution: Dorothea Dix Hospital (Capital only)
- Institution: Eastern School for the Deaf (Capital only)
- Institution: Governor Morehead School (Capital only)
- Institution: J. Iverson Biddle Developmental Center (Capital only)

Page 1 of 1

Displaying Items 1 - 2 of 2

Step 16: Use the pointer to select the Division/Institution from the list that corresponds to the Worksheet II request you wish to create.



The screenshot shows the ncIBIS BRU Work Queue interface. A dialog box titled "New WSII Form - Basic Information" is open, prompting the user to enter information. The dialog contains the following fields:

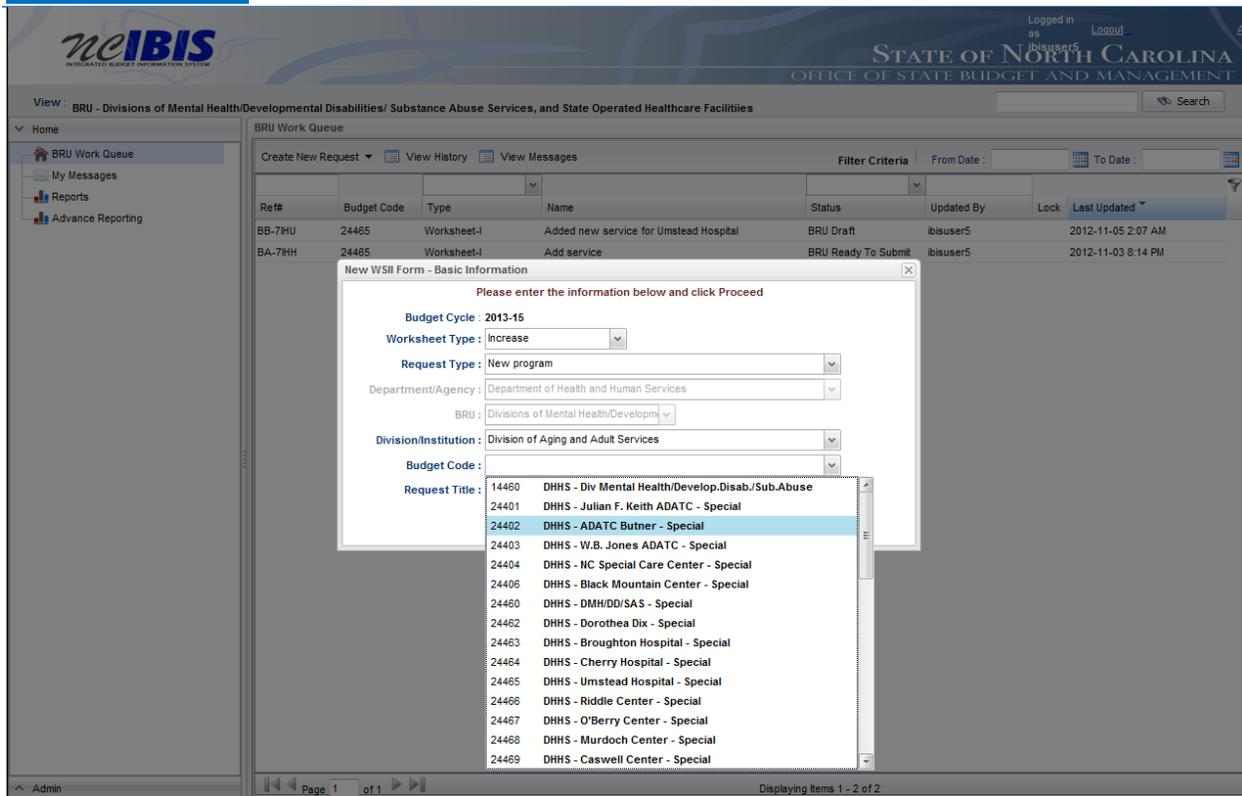
- Budget Cycle: 2013-15
- Worksheet Type: Increase
- Request Type: New program
- Department/Agency: Department of Health and Human Services
- BRU: Divisions of Mental Health/Developm
- Division/Institution: Division of Aging and Adult Services
- Budget Code: (empty dropdown)
- Request Title: (empty text field)

Buttons for "Cancel" and "Proceed" are located at the bottom of the dialog. The background interface shows a table with columns: Ref#, Budget Code, Type, Name, Status, Updated By, Lock, and Last Updated. Two rows are visible:

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-7HU	24465	Worksheet-I	Added new service for Umstead Hospital	BRU Draft	ibisuser5		2012-11-05 2:07 AM
BA-7HH	24465	Worksheet-I	Add service	BRU Ready To Submit	ibisuser5		2012-11-03 8:14 PM

Step 16 Result (above): You will see that the field is populated with the Division/Institution selected, and the dropdown list disappears.

Step 17: The seventh field, Budget Code, is a dropdown list that displays the Budget Codes that are associated with the selected Department/Agency, BRU and Division/Institution that you have selected. Choose the Budget Code from the dropdown list that is appropriate for the WSII that you are creating.



View: BRU - Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities

BRU Work Queue

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-7HU	24465	Worksheet-I	Added new service for Umstead Hospital	BRU Draft	ibisuser5		2012-11-05 2:07 AM
BA-7HH	24465	Worksheet-I	Add service	BRU Ready To Submit	ibisuser5		2012-11-03 8:14 PM

New WSII Form - Basic Information

Please enter the information below and click Proceed

Budget Cycle : 2013-15

Worksheet Type : Increase

Request Type : New program

Department/Agency : Department of Health and Human Services

BRU : Divisions of Mental Health/Developm

Division/Institution : Division of Aging and Adult Services

Budget Code :

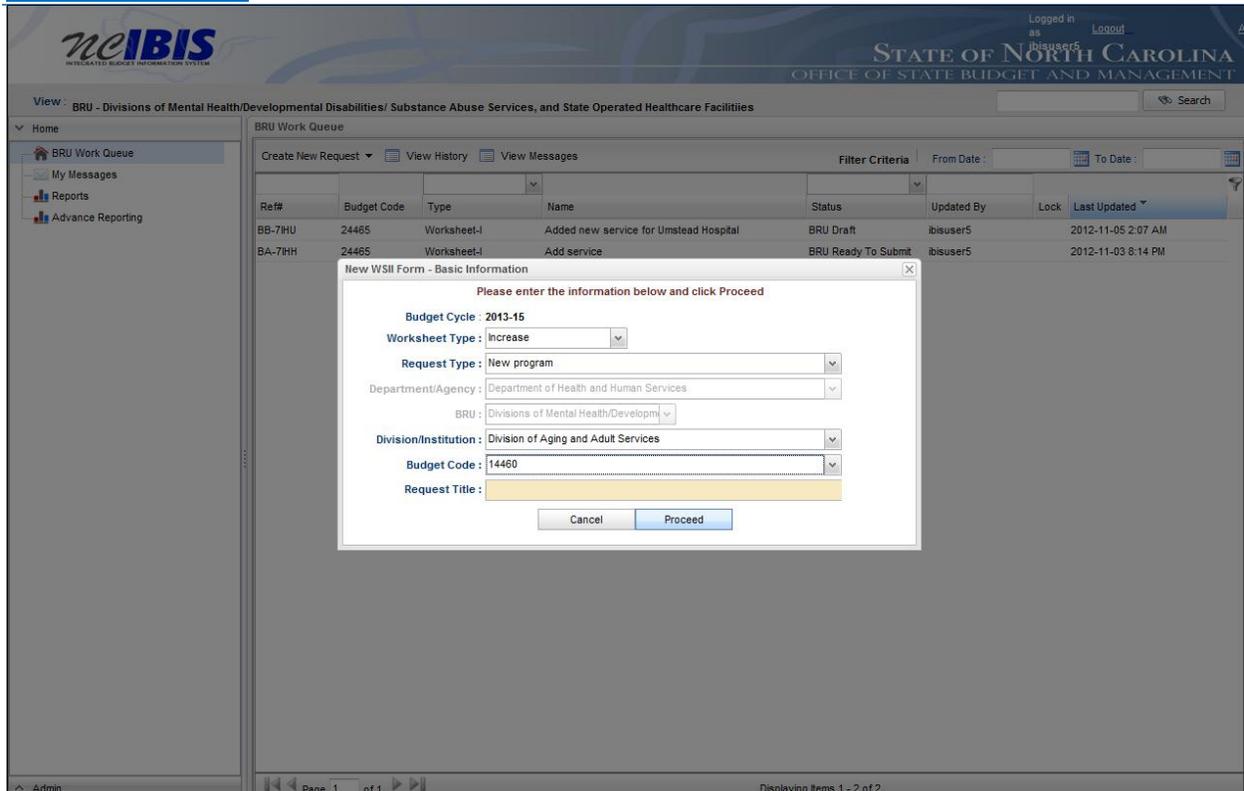
Request Title :

- 14460 DHHS - Div Mental Health/Develop.Disab./Sub.Abuse
- 24401 DHHS - Julian F. Keith ADATC - Special
- 24402 DHHS - ADATC Butner - Special
- 24403 DHHS - W.B. Jones ADATC - Special
- 24404 DHHS - NC Special Care Center - Special
- 24406 DHHS - Black Mountain Center - Special
- 24460 DHHS - DMH/DD/SAS - Special
- 24462 DHHS - Dorothea Dix - Special
- 24463 DHHS - Broughton Hospital - Special
- 24464 DHHS - Cherry Hospital - Special
- 24465 DHHS - Umstead Hospital - Special
- 24466 DHHS - Riddle Center - Special
- 24467 DHHS - O'Berry Center - Special
- 24468 DHHS - Murdoch Center - Special
- 24469 DHHS - Caswell Center - Special

Page 1 of 1

Displaying Items 1 - 2 of 2

Step 17 Result (below): You will see that the field is populated with Budget Code selected, and the dropdown list disappears.



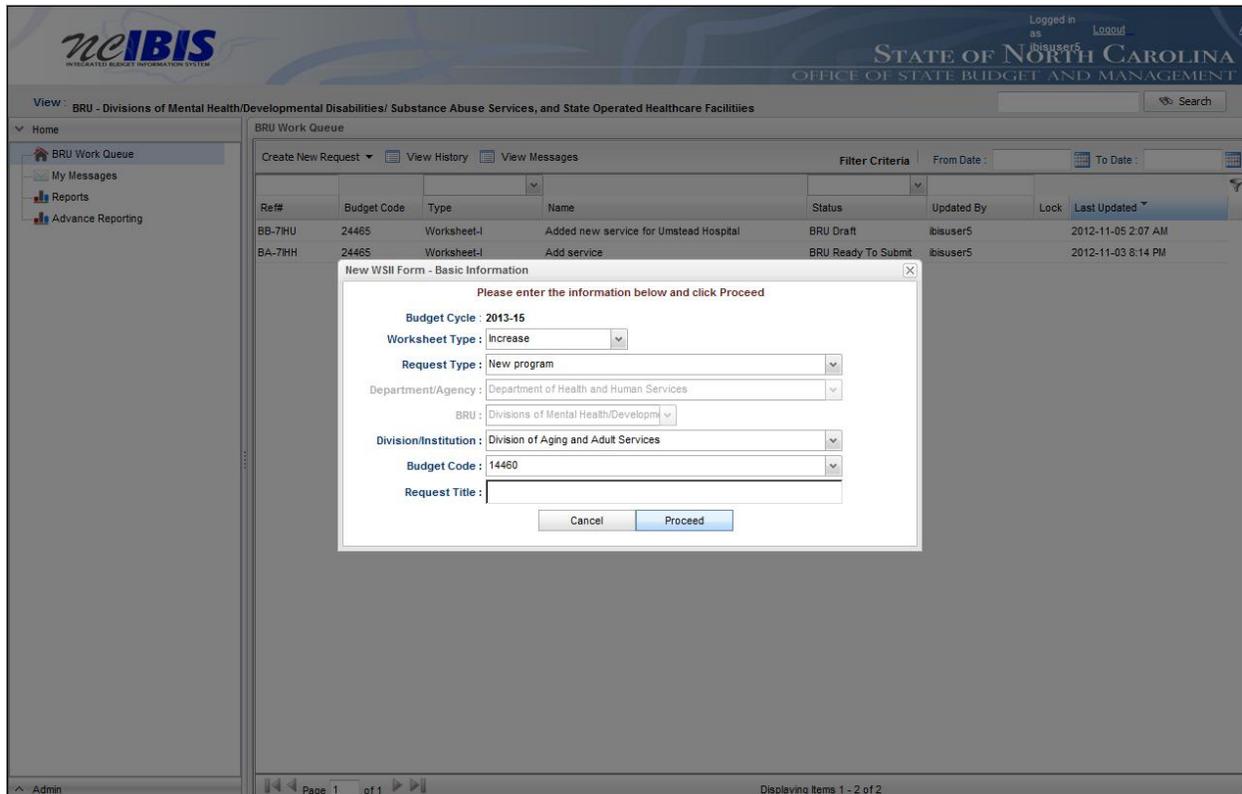
The screenshot shows the neIBIS interface for the BRU Work Queue. A dialog box titled "New WSII Form - Basic Information" is open, prompting the user to enter details for a new request. The dialog contains the following fields:

- Budget Cycle:** 2013-15
- Worksheet Type:** Increase
- Request Type:** New program
- Department/Agency:** Department of Health and Human Services
- BRU:** Divisions of Mental Health/Developm
- Division/Institution:** Division of Aging and Adult Services
- Budget Code:** 14460
- Request Title:** (An empty text field for the user to enter the request title.)

Buttons for "Cancel" and "Proceed" are located at the bottom of the dialog. The background interface shows a table of BRU items with columns for Ref#, Budget Code, Type, Name, Status, Updated By, Lock, and Last Updated.

Step 18: The eighth and final field, Request Title, is an editable field for you to type the title of the WSII request that you are creating.

Step 19: Click in the Request Title field. You will see a flashing cursor in the field. Proceed to type in the Title for the Worksheet Request.



The screenshot shows the neIBIS interface with a 'BRU Work Queue' table and a 'New WSII Form - Basic Information' dialog box. The dialog box contains the following fields:

- Budget Cycle: 2013-15
- Worksheet Type: Increase
- Request Type: New program
- Department/Agency: Department of Health and Human Services
- BRU: Divisions of Mental Health/Developm
- Division/Institution: Division of Aging and Adult Services
- Budget Code: 14460
- Request Title: (empty field with a cursor)

Buttons for 'Cancel' and 'Proceed' are visible at the bottom of the dialog box.

Step 19 Result (below): The title appears in the field as entered.



Logged in as **ibisuser5** [Logout](#)

STATE OF NORTH CAROLINA
OFFICE OF STATE BUDGET AND MANAGEMENT

View: BRU - Divisions of Mental Health/Developmental Disabilities/ Substance Abuse Services, and State Operated Healthcare Facilities

Home

- BRU Work Queue
- My Messages
- Reports
- Advance Reporting

BRU Work Queue

Create New Request | View History | View Messages

Filter Criteria | From Date: | To Date: |

Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-7HU	24465	Worksheet-I	Added new service for Umstead Hospital	BRU Draft	ibisuser5		2012-11-05 2:07 AM
BA-7HH	24465	Worksheet-I	Add service	BRU Ready To Submit	ibisuser5		2012-11-03 8:14 PM

New WSII Form - Basic Information

Please enter the information below and click Proceed

Budget Cycle: 2013-15

Worksheet Type: Increase

Request Type: New program

Department/Agency: Department of Health and Human Services

BRU: Divisions of Mental Health/Developmental Disabilities

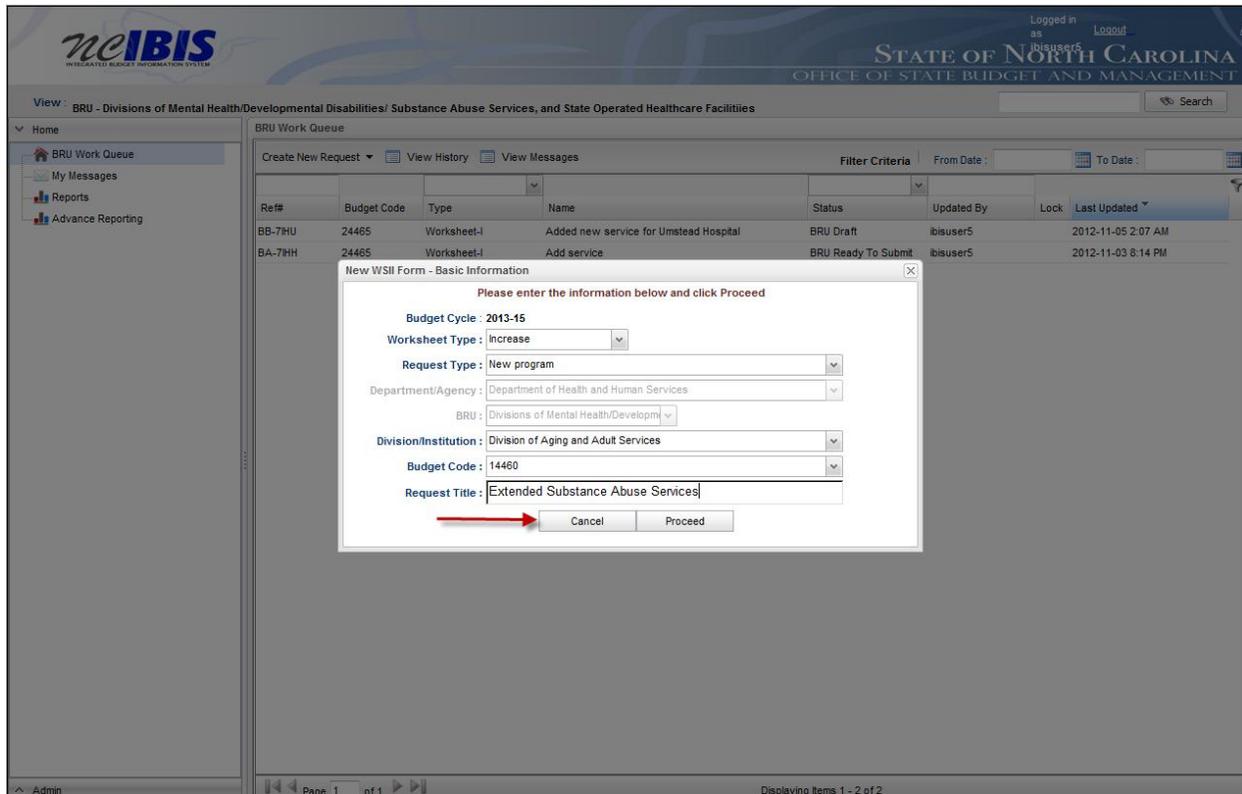
Division/Institution: Division of Aging and Adult Services

Budget Code: 14460

Request Title: Extended Substance Abuse Services

Page 1 of 1 | Displaying items 1 - 2 of 2

Step 20: If you click on the Cancel button (below), the New WSII form – Basic Information window closes, nothing is saved, and you return to the BRU Work Queue.



The screenshot displays the neIBIS interface. At the top, it shows the user is logged in as 'ibisuser5'. The main area is titled 'BRU Work Queue' and contains a table with the following data:

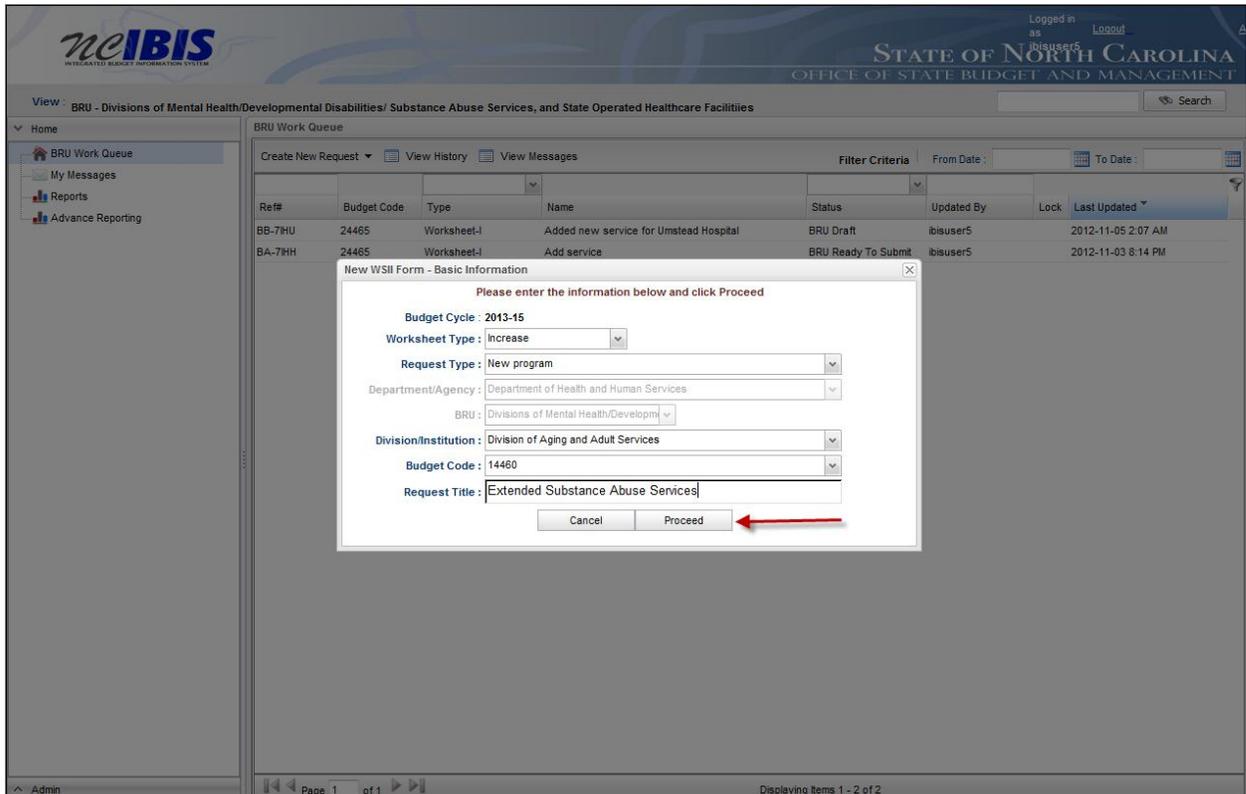
Ref#	Budget Code	Type	Name	Status	Updated By	Lock	Last Updated
BB-7HU	24465	Worksheet-I	Added new service for Umstead Hospital	BRU Draft	ibisuser5		2012-11-05 2:07 AM
BA-7HH	24465	Worksheet-I	Add service	BRU Ready To Submit	ibisuser5		2012-11-03 8:14 PM

A dialog box titled 'New WSII Form - Basic Information' is open in the foreground. It contains the following fields and values:

- Budget Cycle: 2013-15
- Worksheet Type: Increase
- Request Type: New program
- Department/Agency: Department of Health and Human Services
- BRU: Divisions of Mental Health/Developm
- Division/Institution: Division of Aging and Adult Services
- Budget Code: 14460
- Request Title: Extended Substance Abuse Services

At the bottom of the dialog box, there are two buttons: 'Cancel' and 'Proceed'. A red arrow points to the 'Cancel' button.

Step 21: If you are satisfied with your entries and want to continue on, click on the Proceed button.



Step 21 Result (Below): You will see a Worksheet II form open. Note: The Worksheet's five tabs (Basic Information, Positions, Budget Detail, Other and Attachments/References) will appear in the upper left corner of the screen.

**** STATUS: BRU_DRAFT ****

WORKSHEET II (TITLE: Extended Substance Abuse Services)

UnLock Form

Basic Information | Positions | Budget Detail | Other | Attachments/References

Screen ID : **WSII-0**
IBIS ID : **7LJN**

Budget Cycle : 2013-15
Worksheet Type : Increase
Request Type : New program
Department/Agency : Department of Health and Human Services
Divisions of Mental Health/Developmental Disabilities/
BRU : Substance Abuse Services, and State Operated Healthcare
Facilities
Division/Institution : Division of Aging and Adult Services
BudgetCode : 14460
Title : Extended Substance Abuse Services

Give a brief description of the item or initiative:
[Click here for Rich Text Editor](#) SpellCheck ?

Problem/issue being addressed:
[Click here for Rich Text Editor](#) SpellCheck ?

Anticipated outcome/impact after implementation of changes:
[Click here for Rich Text Editor](#) SpellCheck ?

Export PDF | Save Draft | Save & Close | Ready To Submit | Delete Request

Step 22: The default appearance of a new WSII form is to display the Basic Information tab first. You can navigate from tab to tab by clicking on the tab name.

UnLock Form

**** STATUS: BRU_DRAFT ****
 WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information Positions Budget Detail Other Attachments/References

Budget Cycle : 2013-15
 Worksheet Type : Increase
 Request Type : New program
 Department/Agency : Department of Health and Human Services
 Divisions of Mental Health/Developmental Disabilities/
 BRU : Substance Abuse Services, and State Operated Healthcare
 Facilities
 Division/Institution : Division of Aging and Adult Services
 BudgetCode : 14460
 Title : Extended Substance Abuse Services

Screen ID : WSII-0
 IBIS ID : 7LJN

Give a brief description of the item or initiative:
[Click here for Rich Text Editor](#) SpellCheck ?

Problem/issue being addressed:
[Click here for Rich Text Editor](#) SpellCheck ?

Anticipated outcome/impact after implementation of changes:
[Click here for Rich Text Editor](#) SpellCheck ?

Export PDF Save Draft Save & Close Ready To Submit Delete Request

Step 23 (above): Verify the information displayed in the following fields – all but Title are non-editable:

Budget Cycle: The form will show the current Budget Cycle year (this is system generated and will change at appropriate periods in time)

Worksheet Type: Increase - this option was selected in the New WSII Form – Basic Information screen

Department/Agency: The Department/Agency that was selected in the New WSII Form – Basic Information screen.

BRU: The BRU selected in the New WSII Form – Basic Information screen.

Division/Institution: The Division/Institution selected in the New WSII form – Basic Information screen.

Budget Code: The Budget Code selected in the New WSII Form – Basic Information screen.

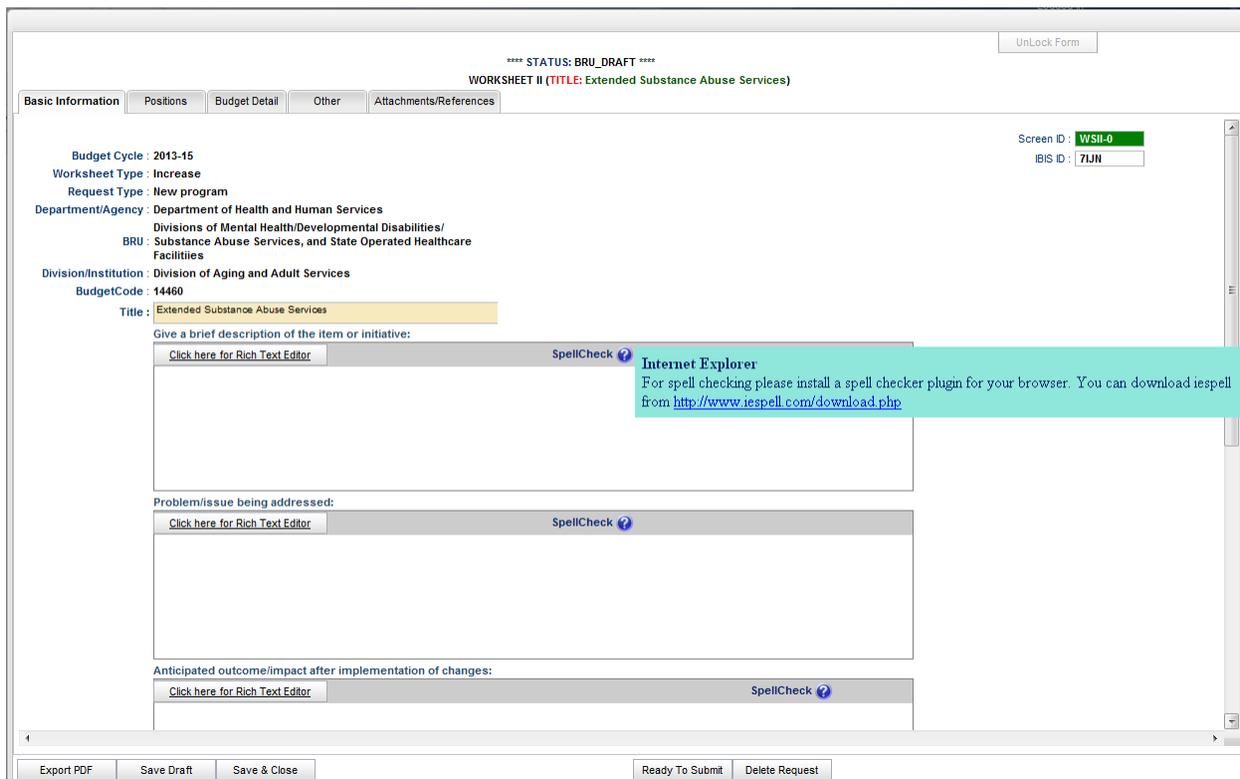
Title: The title entered in the New WSII Form – Basic Information screen. This field is editable.

WHAT ABOUT SCREEN ID AND IBIS ID???

Step 24: Click on the Help Text Icon (wherever you see a blue question mark). The one highlighted below is a spell checker that you can apply once you have entered text in the Description field.

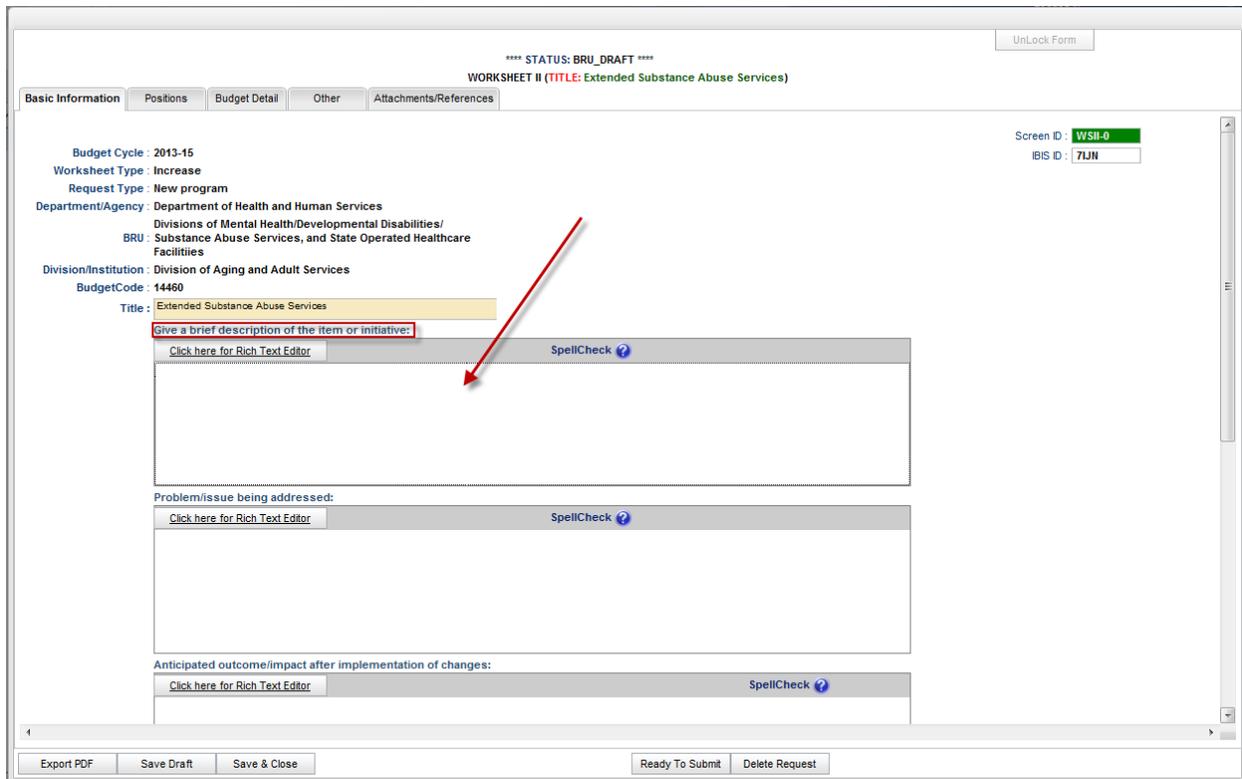


Step 25 Result (below): You will see a pop up with help text displayed, which will occur whenever you click on the Help Text Icon.



The screenshot shows the IBIS application interface. At the top, it displays "**** STATUS: BRU_DRAFT ****" and "WORKSHEET II (TITLE: Extended Substance Abuse Services)". Below this are tabs for "Basic Information", "Positions", "Budget Detail", "Other", and "Attachments/References". The "Basic Information" tab is active, showing fields for "Budget Cycle", "Worksheet Type", "Request Type", "Department/Agency", "Division/Institution", and "BudgetCode". The "Title" field is highlighted in yellow and contains "Extended Substance Abuse Services". Below the title field are three text input areas, each with a "Click here for Rich Text Editor" button and a "SpellCheck" icon. A pop-up window is overlaid on the first text input area, titled "Internet Explorer" and containing the text: "For spell checking please install a spell checker plugin for your browser. You can download iespell from <http://www.iespell.com/download.php>". At the bottom of the interface are buttons for "Export PDF", "Save Draft", "Save & Close", "Ready To Submit", and "Delete Request".

Step 26: Click in the large white space under the field titled “Give a brief description of the Item or Initiative: “



**** STATUS: BRU_DRAFT ****
WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information | Positions | Budget Detail | Other | Attachments/References

Screen ID : WSII-0
IBIS ID : 7JUN

Budget Cycle : 2013-15
Worksheet Type : Increase
Request Type : New program
Department/Agency : Department of Health and Human Services
Divisions of Mental Health/Developmental Disabilities/
BRU : Substance Abuse Services, and State Operated Healthcare
Facilities
Division/Institution : Division of Aging and Adult Services
BudgetCode : 14460
Title : Extended Substance Abuse Services

Give a brief description of the item or initiative:

Click here for Rich Text Editor | SpellCheck ?

Problem/issue being addressed:

Click here for Rich Text Editor | SpellCheck ?

Anticipated outcome/impact after implementation of changes:

Click here for Rich Text Editor | SpellCheck ?

Export PDF | Save Draft | Save & Close | Ready To Submit | Delete Request

Step 27: Type or paste text in the white space that is supportive of the WSII request you are developing.

**** STATUS: BRU_DRAFT ****
WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information Positions Budget Detail Other Attachments/References

Screen ID : **WSII-0**
 IBIS ID : **7LJN**

Budget Cycle : 2013-15
 Worksheet Type : Increase
 Request Type : New program
 Department/Agency : Department of Health and Human Services
 Divisions of Mental Health/Developmental Disabilities/
 BRU : Substance Abuse Services, and State Operated Healthcare
 Facilities
 Division/Institution : Division of Aging and Adult Services
 BudgetCode : 14460
 Title : Extended Substance Abuse Services

Give a brief description of the item or initiative:
 SpellCheck ?
 Lead and guide requirements discussions with other staff in a structured focused manner in order to understand and define business needs for documentation and development

Problem/issue being addressed:
 SpellCheck ?

Anticipated outcome/impact after implementation of changes:
 SpellCheck ?

Step 28: Type or paste appropriate text in the next four text boxes labeled:

Problem/issue being addressed:

Anticipated outcome/impact after implementation of changes:

Anticipated outcome/impact after implementation of changes:

Relation to agency goals and agency key indicators:

Step 29: The final section of the Basic Information tab on the Worksheet II form, is the Relevance to Governor’s agenda section. This section has a field labeled Agenda, which has a dropdown list.

**** STATUS: BRU_DRAFT ****

UnLock Form

WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information | Positions | Budget Detail | Other | Attachments/References

Anticipated outcome/impact after implementation of changes:

[Click here for Rich Text Editor](#) SpellCheck ?

Relation to agency goals and agency key indicators:

[Click here for Rich Text Editor](#) SpellCheck ?

Relevance to Governor's Agenda
Describe the relevance of the request to the Governor's Agenda. Pick the relevant agenda item. If using quantitative measures, add them to table above

Agenda :

Impact on Governor's Agenda: [Click here for Rich Text Editor](#) SpellCheck ?

Problem/issue being addressed:

[Click here for Rich Text Editor](#) SpellCheck ?

Export PDF | Save Draft | Save & Close | Ready To Submit | Delete Request

Step 30: The dropdown list displays the Governor's Agenda. This list of items will change periodically. Select an item from the list.

None

Assist small and rural businesses to stay in business and grow

Do more with less

Enforce zero tolerance of fraud and corruption

Ensure all students graduate Career and College ready

Keep NC safe

Step 30 Result (below): The selected Agenda item will populate the field and the dropdown list will disappear.

Relevance to Governor's Agenda

Describe the relevance of the request to the Governor's Agenda. Pick the relevant agenda item. If using quantitative measures add them to table above

Agenda: ▼

Impact on Governor's Agenda:

[Click here for Rich Text Editor](#) SpellCheck ?

Step 31: Type information about this WSII and its relationship to the selected Governor's Agenda item in the field labeled:

Impact on Governor's Agenda:

Step 32: Move to the top of the WSII form and click on the Positions tab to bring that portion of the Worksheet to the forefront.

**** STATUS: BRU_DRAFT **** UnLock Form

WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information **Positions** Budget Detail Other Attachments/References

Screen ID:
IBIS ID:

Positions Requested

Fund#	CC#	Account#	Type	Grade	Title	07/01/2013	FTE Y1	FTE Y2	Annual Salary	Salary 1	Salary 2	Program	Add
Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
No items to show.													

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
**Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
#Total F.T.E.'s equal the number of total FTE's shown on previous tab of this request.

Summary	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)
Total Receipt Positions	0.000	0.000	\$0.00	\$0.00	\$0.00
Total Non-receipt Positions	0.000	0.000	\$0.00	\$0.00	\$0.00

Step 33: If the Worksheet II request being developed includes staffing positions, information regarding such positions will be filled out on this tab. The information will be entered in the section labeled:

Positions Requested

Step 34: In this section, four buttons appear: Edit Row, Remove Row(s), Sort Rows and Cancel Edit:



Step 35: The above buttons can only be utilized once rows have been created. Since we are developing a new WSII, we will look first at adding rows, then return to describe the functionality associated with these buttons.

Step 36: To Add a Row, you will work with the fields outlined with a red box below:

Fund#	CC#	Account#	Type	Grade	Title	07/01/2013	FTE Y1	FTE Y2	Annual Salary	Salary 1	Salary 2	Program	Add
Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
No items to show.													

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.

**Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.

#Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 37: These fields: Fund, Cost Center, Account, Type, Grade, Title, Date, FTE Y1, FTE Y2, Annual Salary, Salary 1, Salary 2, and Program, are all required information regarding positions in a Worksheet II.



Step 38: Fill in the fields in the order they appear in the row. Fund, Cost Center, Type and Program are all dropdown lists and your entry must be selected from the dropdown lists.



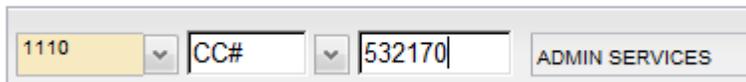
1110	General Administration
1111	General Administration - LME ADMIN
1160	WORKFORCE DEVELOPMENT
1210	Adult Mental Health Administration
1211	Mental Health Administration - Federal
1212	Child and Family Administration
1215	WILLIE M. Program Services
1216	Whitaker School
1217	Eastern Adolescent Treatment Program
1220	Broughton Hospital
1230	Cherry Hospital
1240	Dorothea Dix Hospital
1250	Longleaf Neuro - Medical Treatment Center
1260	John Umstead Hospital
1262	ENFORCE UNDERAGE DRINK L

Step 39: Cost Center is an optional field, and the Cost Center dropdown list will only display values of the Department/Agency uses Cost Centers and there are costs centers setup for the selected Fund code.

Step 40: The Account field will present a list of Accounts once the user has entered three digits into the field. Accounts are so numerous the you must narrow the list down by entering the first few digits, or you may type the full Account code in the field yourself.

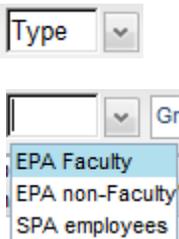
532	Type	Grade	Title
532110	LEGAL SERVICES		
532110002	LEG SVCS - COURT REPORTRS		
532110007	LEG SVCS - LEG CNCL ADULT		
532110010	LEG SVCS - WITNESS FEES		
532110013	LEG SVCS - CUSTODY MEDITN		
532110032	LEGAL SVC-TRANS REC/BRIEF		
532120	FINAN/AUDIT SERVICES		
532120001	FIN/AUD-CONSULTANT FEES		
532121	SECURITIES TRANS FEE		
532122	SECURITIES TRANS FEE NOOP		
532123	ARRA BILLING RATE		
532131	HOSPITAL PROVDED MED SERV		
532131001	HOSP MED SER-EMERG RM		
532131002	HOSP MED SER-X RAY		
532131003	HOSP MED SER-AMBULNCE/EMS		

Step 41: Select the appropriate Account Code and it will populate the form and the list will disappear. Selection of an Account Code will also cause the adjacent Account Code name field to populate.



A screenshot of a form with three input fields and a button. The first field contains '1110', the second 'CC#' with a dropdown arrow, and the third '532170'. To the right is a button labeled 'ADMIN SERVICES'.

Step 42: Clicking in the Type field will cause the Position Type dropdown list to appear. Select the appropriate position type from the list.



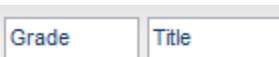
A screenshot showing a 'Type' dropdown menu. The dropdown list is open, showing three options: 'EPA Faculty', 'EPA non-Faculty', and 'SPA employees'.

Step 43: When a Position Type has been selected, it will populate the field and the dropdown list will disappear.



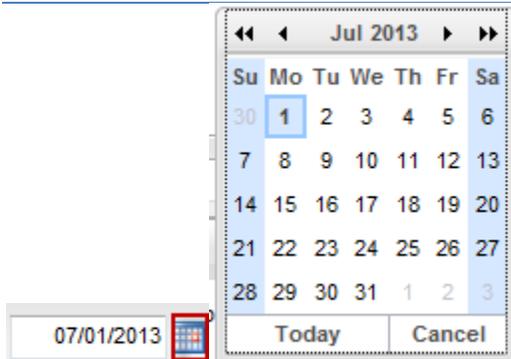
A screenshot of a form field containing the text 'employ' with a dropdown arrow.

Step 44: Enter Grade and Title in the next two text fields. These fields are editable and do not have dropdown lists associated with them.



A screenshot of two adjacent text input fields. The first field is labeled 'Grade' and the second is labeled 'Title'.

Step 45: In the Effective Date field, enter the beginning date of the position(s) requested formatted as shown, or select the date from the calendar by clicking on the calendar icon next to the field.



Step 46: In the next two fields, FTE Y1 and FTE Y2, enter the number of positions of this type are requested for FY1 and FY2 of the budget period. BE AWARE numbers may be entered as either positive or negative numbers

FTE Y1	FTE Y2
1	1

Step 47: In the Annual Salary field, enter the annual wage for the position in whole numbers, without \$ or ,

Annual Salary
42000

Step 48: IBIS will calculate the number of positions by the Annual Salary, prorated against the position start date, and show the amount requested in the Budget Salary fields, FY1 and FY2

0	0
42000.00	84000.00

Step 49: Finally, the Program field presents a dropdown list of the Retirement programs that the position(s) may participate in:

Prograr
<ul style="list-style-type: none"> Teachers and State Employees Retirement System (TSERS) Law Enforcement Officer Retirement System (LEO) Legislative Retirement System Consolidated Judicial Retirement System (CJRS) Optional Retirement Program (ORP) (UNC System and Community Colleges) Firemens and Rescue Squad Workers Pension Fund

Step 50: Select the appropriate retirement program from the dropdown list. That program name will populate the field and the dropdown list will disappear.

Step 51: Click the Add button and the row will populate the positions grid, clearing the fields for entry of another row. The Add row fields will persist the data entered for Fund Code and Cost Center, to attempt to reduce the number of entries the user must provide in order to create a second row. Although these entries will be pre-filled, other Fund Codes and Cost Centers may be selected by the user.



Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 52: Repeat the above process to add all the Position rows necessary for the Worksheet II you are creating.

Positions Requested

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARIE...	EPA Faculty	52	Assistant	07/01/2013	0.500	2.000	\$55,000.00	\$27,500.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 53: To edit a row that has been entered, click on a row to highlight it:

Positions Requested

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARE...	EPA Faculty	52	Assistant	07/01/2013	0.500	2.000	\$55,000.00	\$27,500.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 54: Click on the Edit Row button, and the data in the selected row will populate the Edit/Add row line at the top of the grid.

Positions Requested

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARE...	EPA Faculty	52	Assistant	07/01/2013	0.500	2.000	\$55,000.00	\$27,500.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
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 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Positions Requested

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110	102099	531110	EPA REG SALARI...	EPA Facu	52	Assistant	07/01/2013	0.5	2	55000	27500	110000	Teachers
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARE...	EPA Faculty	52	Assistant	07/01/2013	0.500	2.000	\$55,000.00	\$27,500.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 55: When a row has been selected for edit, you may change any of the data previously entered. To save changes you must click on the Update Button at the end of the row.

1110	102099	531110	EPA REG SALARI...	EPA Facu	52	Assistant	07/01/2013	0.5	2	55000	27500	110000	Teachers	Update
------	--------	--------	-------------------	----------	----	-----------	------------	-----	---	-------	-------	--------	----------	--------

Step 56: Once Update has been clicked, the add/update row will clear (except for the Fund Code and Cost Center fields) and the updated data will show in the grid below.

Positions Requested

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARIE...	EPA Faculty	52	Assistant	07/01/2013	1.000	2.000	\$55,000.00	\$55,000.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 57: To delete a row that has been entered, click on a row to highlight it:

Positions Requested

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARIE...	EPA Faculty	52	Assistant	07/01/2013	0.500	2.000	\$55,000.00	\$27,500.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

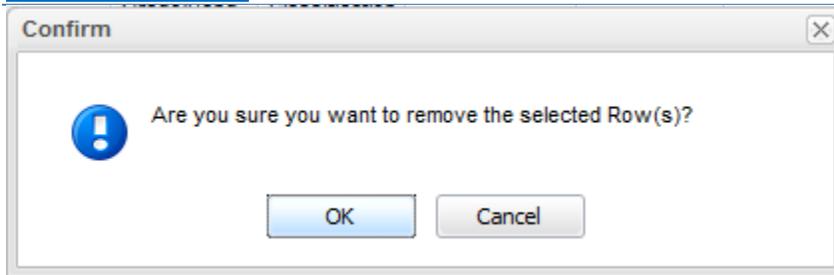
Step 58: Click on the Remove Row(s) button, and a confirm deletion message box will appear.

Positions Requested

Edit Row **Remove Row(s)** Sort Rows Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARIE...	EPA Faculty	52	Assistant	07/01/2013	1.000	2.000	\$55,000.00	\$55,000.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.



Step 59: To cancel the deletion, click the Cancel button, to complete the deletion, click the OK button.

Step 60: To Sort the rows that you have entered, click the Sort Rows button.

Positions Requested

Edit Row Remove Row(s) **Sort Rows** Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARIE...	EPA Faculty	52	Assistant	07/01/2013	1.000	2.000	\$55,000.00	\$55,000.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.

**Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.

#Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 61: The rows will sort in Fund Code, Cost Center, Account Number order, ascending. Click a second time and they will resort in descending order.

Positions Requested

Edit Row Remove Row(s) **Sort Rows** Cancel Edit

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARIE...	EPA Faculty	52	Assistant	07/01/2013	1.000	2.000	\$55,000.00	\$55,000.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.

**Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.

#Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 62: If a row has been selected for edit, by highlighting and clicking the Edit Row, but then no edit is necessary, or you have changed your mind, simply click the Cancel Edit to clear the Add/Edit row and to return the selected row to the grid, unchanged.

Positions Requested

Fund Code	Cost Center	Account Number	Account Description	Other Information	Grade/Band	Classification	Effective Date	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)	Retirement Program
1110	102099	531110	EPA REG SALARI...	EPA Facu...	52	Assistant	07/01/2013	1	2	\$5000	\$5000	\$110000	Teachers
1110		532170	ADMIN SERVICES	EPA non-Fa...	46	PSA II	07/01/2013	0.000	0.000	\$42,000.00	\$0.00	\$0.00	Teachers and State...
1110	102099	531110	EPA REG SALARE...	EPA Faculty	52	Assistant	07/01/2013	1.000	2.000	\$55,000.00	\$55,000.00	\$110,000.00	Teachers and State...
1110	102099	531125	EPA-SPC SAL-APP...		36	Clerk	07/01/2013	1.000	1.000	\$22,500.00	\$22,500.00	\$22,500.00	Teachers and State...

**Midpoint level salary for the classification requested unless otherwise justified in the Notes section above.
 **Requested salary level for banded classifications shall be the established market or reference rate for the banded level (contributing, journey, or advanced) unless otherwise justified in the Notes section above.
 #Total F.T.E's equal the number of total FTE's shown on previous tab of this request.

Step 63: At the bottom of the Positions tab, a Summary table is displayed:

Summary	FTE (2013-14)	FTE (2014-15)	Annual Salary**	Budgeted Salary (2013-14)	Budgeted Salary (2014-15)
Total Receipt Positions	0.000	0.000	\$0.00	\$0.00	\$0.00
Total Non-receipt Positions	2.000	3.000	\$119,500.00	\$77,500.00	\$132,500.00
Total Positions	2.000	3.000	\$119,500.00	\$77,500.00	\$132,500.00

Step 64: The Summary information is extrapolated from the data entered above in the Positions Requested table, and none of the data in the Summary is editable. Any changes to the Summary information must be made by editing the data in the Positions Requested table.

Step 65: Move to the top of the WSII form and click on the Budget Detail tab to bring that portion of the Worksheet to the forefront.

UnLock Form

**** STATUS: BRU_DRAFT ****
WORKSHEET II (TITLE: Extended Substance Abuse Services)

Basic Information Positions **Budget Detail** Other Attachments/References

Screen ID : WSII-2
IBIS ID : 7JUN

Requirements

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund#	CC#	Account#		Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Add			
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18
No items to show.												

Receipts

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund#	CC#	Account#		Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Add			
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18
No items to show.												

Summary

	Actual (2011-12)	Authorized (2012-13)	2013-14	2014-15	2015-16	2016-17	2017-18
Total Requirements	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Export PDF Save Draft Save & Close Ready To Submit Delete Request

Step 66: Inserting rows in the Requirements and Receipts sections of the Worksheet form works in the same fashion as inserting rows on the Positions tab. In the Requirements section, there are four buttons that appear first: Edit Row, Remove Row(s), Sort Rows and Cancel Edit. These functions are only utilized when rows have been entered into the form, so we will first look at data entry, then return to these buttons to examine their functionality.

Step 67: To add a row of data that spells out a requirement of this Worksheet II form, focus on the data entry row directly below the buttons mentioned above.

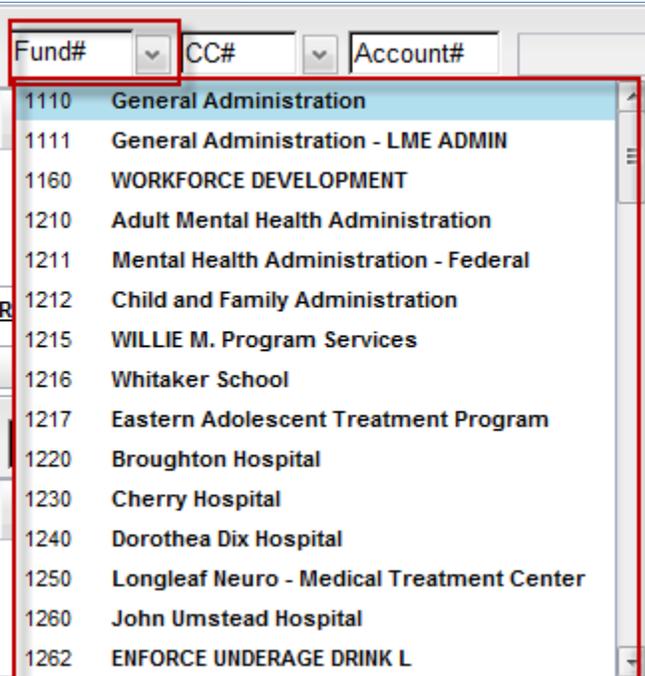
Requirements

Edit Row Remove Row(s) Sort Rows Cancel Edit

Fund#	CC#	Account#		Y1 Amt	Y2 Amt	Y3 Amt	Y4 Amt	Y5 Amt	Add

Step 68: The fields in this row are editable, and when the end of the row is reached, the Add button will save this data so that another row can be entered.

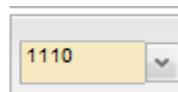
Step 69: The Fund field contains a dropdown list that displays Fund codes available to the agency/BRU that you are creating the WSII for.



A screenshot of a software interface showing a dropdown menu for the 'Fund#' field. The menu is open, displaying a list of fund codes and their corresponding names. The first item, '1110 General Administration', is highlighted in blue. The other items are listed in black text. The dropdown is framed by a red border.

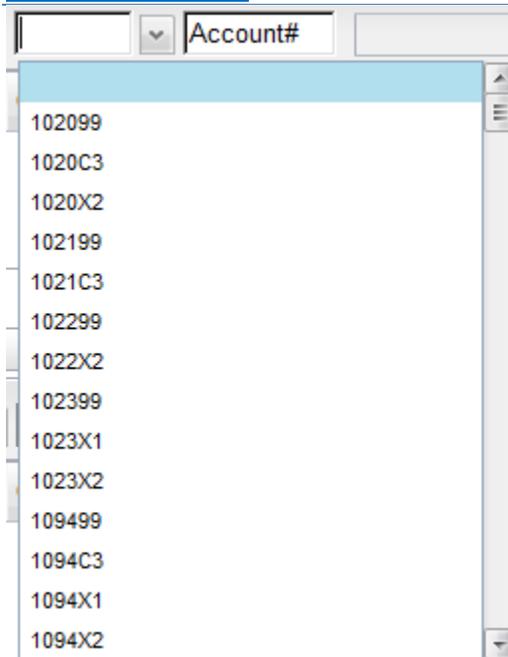
Fund#	Description
1110	General Administration
1111	General Administration - LME ADMIN
1160	WORKFORCE DEVELOPMENT
1210	Adult Mental Health Administration
1211	Mental Health Administration - Federal
1212	Child and Family Administration
1215	WILLIE M. Program Services
1216	Whitaker School
1217	Eastern Adolescent Treatment Program
1220	Broughton Hospital
1230	Cherry Hospital
1240	Dorothea Dix Hospital
1250	Longleaf Neuro - Medical Treatment Center
1260	John Umstead Hospital
1262	ENFORCE UNDERAGE DRINK L

Step 70: Select the Fund from the list that is appropriate to the Worksheet request you are creating. The selected Fund will populate the field and the dropdown list will disappear.



A screenshot of the 'Fund#' field in the software interface. The field is a yellow box containing the text '1110' and a small downward-pointing arrow on the right side, indicating that the dropdown list is now closed.

Step 71: The Cost Center field is optional, but if your Agency/BRU utilizes Cost Centers, the dropdown list will populate with appropriate options.

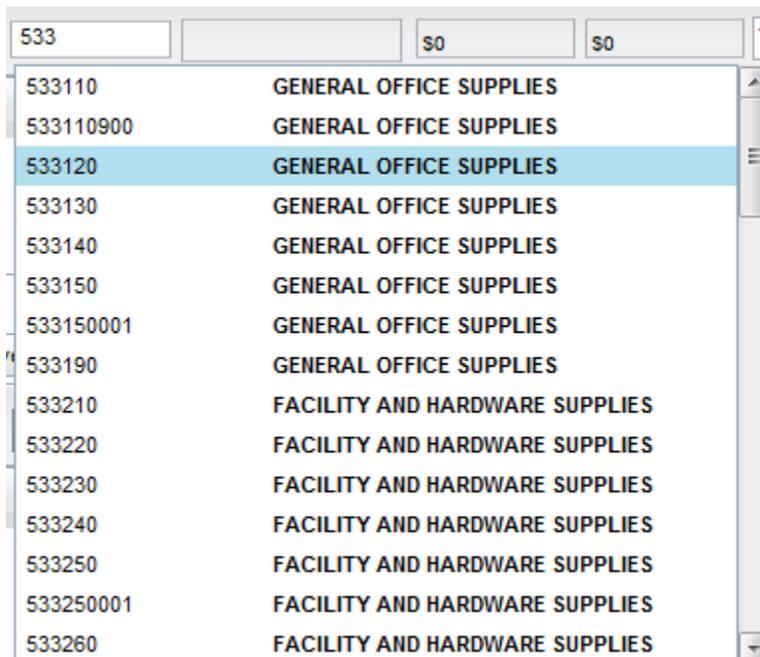


Account#

- 102099
- 1020C3
- 1020X2
- 102199
- 1021C3
- 102299
- 1022X2
- 102399
- 1023X1
- 1023X2
- 109499
- 1094C3
- 1094X1
- 1094X2

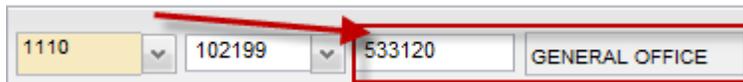
Step 72: Select the desired Cost Center from the dropdown list. It will populate the field and the dropdown list will disappear.

Step 73: The Account field will provide a list of appropriate Accounts when you enter the first 3 digits of the account code that you are looking for.



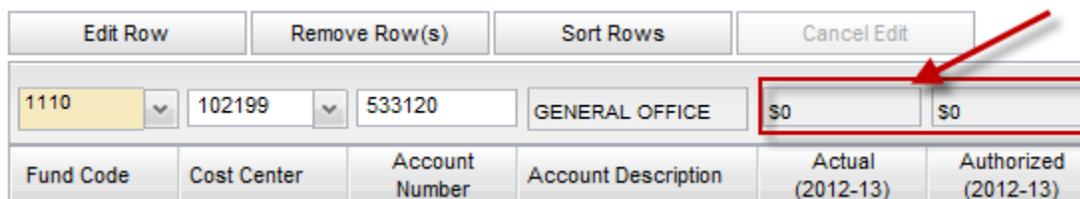
533		\$0	\$0
533110	GENERAL OFFICE SUPPLIES		
533110900	GENERAL OFFICE SUPPLIES		
533120	GENERAL OFFICE SUPPLIES		
533130	GENERAL OFFICE SUPPLIES		
533140	GENERAL OFFICE SUPPLIES		
533150	GENERAL OFFICE SUPPLIES		
533150001	GENERAL OFFICE SUPPLIES		
533190	GENERAL OFFICE SUPPLIES		
533210	FACILITY AND HARDWARE SUPPLIES		
533220	FACILITY AND HARDWARE SUPPLIES		
533230	FACILITY AND HARDWARE SUPPLIES		
533240	FACILITY AND HARDWARE SUPPLIES		
533250	FACILITY AND HARDWARE SUPPLIES		
533250001	FACILITY AND HARDWARE SUPPLIES		
533260	FACILITY AND HARDWARE SUPPLIES		

Step 74: Select the desired Account from the list. It will populate the field and the dropdown list will disappear. By selecting the Account number, the associated Account description will also populate the adjacent field.



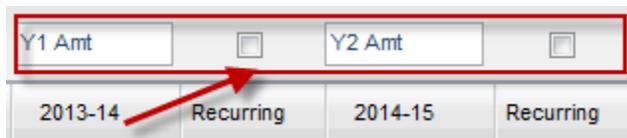
A screenshot of a form with four input fields. The first field contains '1110', the second '102199', the third '533120', and the fourth 'GENERAL OFFICE'. A red box highlights the third and fourth fields, and a red arrow points to the third field.

Step 75: Once the Fund Code, Cost Center and Account Code fields have been populated, the Actual and Authorized fields will auto populate with real numbers associated with this combination of codes, for the current fiscal year. NEW SCREEN SHOT HERE



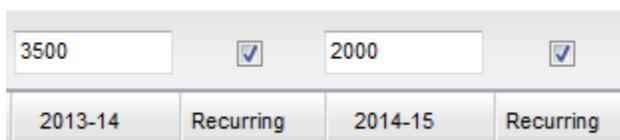
A screenshot of a row entry interface. At the top are buttons: 'Edit Row', 'Remove Row(s)', 'Sort Rows', and 'Cancel Edit'. Below are input fields for 'Fund Code' (1110), 'Cost Center' (102199), 'Account Number' (533120), and 'Account Description' (GENERAL OFFICE). To the right are 'Actual (2012-13)' and 'Authorized (2012-13)' fields, both containing '\$0'. A red box highlights these two fields, and a red arrow points to the 'Actual' field. Below the input fields is a table header with columns: 'Fund Code', 'Cost Center', 'Account Number', 'Account Description', 'Actual (2012-13)', and 'Authorized (2012-13)'.

Step 76: The next set of fields in the Add/Edit Row area are Year 1 and Year 2 amount fields along with a recurring checkbox for each field to indicate your intent with these Worksheet II requests going forward.



A screenshot of a form with two input fields labeled 'Y1 Amt' and 'Y2 Amt', each followed by a checkbox. A red box highlights these four fields, and a red arrow points to the first checkbox. Below the input fields is a table with columns: '2013-14', 'Recurring', '2014-15', and 'Recurring'.

Step 77: Enter amounts required The Y1 Amt and Y2 Amt fields, they will reformat to dollars when you click Add to finish the row entry. BE AWARE amounts may be entered as either positive or negative amounts. Amounts are not required to be entered in both year fields. Clicking in the Recurring checkbox will indicate that the amount is planned to be recurring. Leaving the checkbox empty indicates that it is not recurring. To avoid using the mouse, you can tab to the recurring checkbox and click the space key to place a check in the field.



A screenshot of a form with two input fields containing '3500' and '2000', each followed by a checked checkbox. Below the input fields is a table with columns: '2013-14', 'Recurring', '2014-15', and 'Recurring'.

Step 78: The next set of fields allows you to enter amounts for upcoming fiscal year budgetary planning. Entries in these fields are not mandatory.

Y3 Amt	Y4 Amt	Y5 Amt
2015-16	2016-17	2017-18

Step 79: When you have completed the new row, click on the Add button. The row will move down to the grid below, and the majority of the Add/Edit row will clear.

Add

Step 80: Add as many rows of requirements as appropriate to complete the Worksheet II request. Once the first row is added, the Fund Center and Cost Center codes will pre-populate with the choices made when entering that first row to help quicken the entry of subsequent rows. If these values are not appropriate for subsequent row(s), they can be overwritten.

Edit Row		Remove Row(s)		Sort Rows		Cancel Edit				Y1 Amt	<input type="checkbox"/>	Y2 Amt	<input type="checkbox"/>	Y3 Amt	Y4 Amt	Y5 Amt	Add	
1110	102199																	
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18						
1110	102199	533120	GENERAL OFFICE SU...			\$3,500.00	<input checked="" type="checkbox"/>	\$2,000.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00						

Step 81: The Add/Edit Row(s) functionality for Receipts is identical to the Requirements functionality and therefore each step will not be replicated here.

Receipts

Edit Row		Remove Row(s)		Sort Rows		Cancel Edit				Y1 Amt	<input type="checkbox"/>	Y2 Amt	<input type="checkbox"/>	Y3 Amt	Y4 Amt	Y5 Amt	Add
Fund#	CC#	Account#															
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18					
No items to show.																	

Step 82: Add as many rows of receipts as appropriate to complete the Worksheet II request.

Step 83: To edit a row that has been entered, click on a row to highlight it:

Requirements

Edit Row		Remove Row(s)		Sort Rows		Cancel Edit				Y1 Amt	<input type="checkbox"/>	Y2 Amt	<input type="checkbox"/>	Y3 Amt	Y4 Amt	Y5 Amt	Add
Fund#	CC#	Account#															
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18					
1110	102199	533120	GENERAL OFFICE SU...			\$3,500.00	<input checked="" type="checkbox"/>	\$2,000.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00					
1110	102199	533210	FACILITY AND HARD...			\$200.00	<input type="checkbox"/>	\$100.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00					
1110	102199	533310	VEHICLE EQUIPMENT...			\$6,000.00	<input checked="" type="checkbox"/>	\$6,000.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00					

Step 84: Click on the Edit Row button, and the data in the selected row will populate the Edit/Add row line at the top of the grid.

Edit Row		Remove Row(s)		Sort Rows		Cancel Edit							Update		
1110	102199	533210	FACILITY AND H...			200		100		0	0	0	0	0	Update
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18			
1110	102199	533120	GENERAL OFFICE SU...			\$3,500.00	<input checked="" type="checkbox"/>	\$2,000.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00			
1110	102199	533210	FACILITY AND HARD...			\$200.00	<input type="checkbox"/>	\$100.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00			
1110	102199	533310	VEHICLE EQUIPMENT...			\$6,000.00	<input checked="" type="checkbox"/>	\$6,000.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00			

Step 85: When a row has been selected for edit, you may change any of the data previously entered. To save changes you must click on the Update Button at the end of the row.

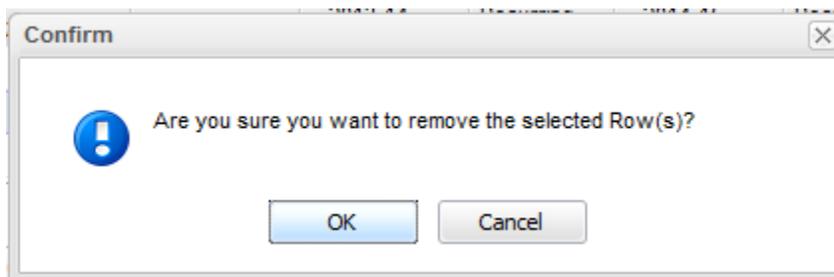
Edit Row		Remove Row(s)		Sort Rows		Cancel Edit							Update	
1110	102199	533210	FACILITY AND H...			200		100		0	0	0	0	Update
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18		
1110	102199	533120	GENERAL OFFICE SU...			\$3,500.00	<input checked="" type="checkbox"/>	\$2,000.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00		
1110	102199	533210	FACILITY AND HARD...			\$200.00	<input type="checkbox"/>	\$100.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00		
1110	102199	533310	VEHICLE EQUIPMENT...			\$6,000.00	<input checked="" type="checkbox"/>	\$6,000.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00		

Step 86: Once Update has been clicked, the add/update row will clear (except for the Fund Code and Cost Center fields) and the updated data will show in the grid below.

Step 87: To delete a row that has been entered, click on a row to highlight it

Edit Row		Remove Row(s)		Sort Rows		Cancel Edit							Add	
1110	102199	Account#				Y1 Amt		Y2 Amt		Y3 Amt	Y4 Amt	Y5 Amt	Add	
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18		
1110	102199	533120	GENERAL OFFICE SU...			\$3,500.00	<input checked="" type="checkbox"/>	\$2,000.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00		
1110	102199	533210	FACILITY AND HARD...			\$200.00	<input type="checkbox"/>	\$100.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00		
1110	102199	533310	VEHICLE EQUIPMENT...			\$6,000.00	<input checked="" type="checkbox"/>	\$6,000.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00		

Step 88: Click on the Remove Row(s) button, and a confirm deletion message box will appear.



Step 89: To cancel the deletion, click the Cancel button, to complete the deletion, click the OK button.

Step 90: To Sort the rows that you have entered, click the Sort Rows button.

Edit Row		Remove Row(s)		Sort Rows		Cancel Edit							
1110	102199	Account#				Y1 Amt	<input type="checkbox"/>	Y2 Amt	<input type="checkbox"/>	Y3 Amt	Y4 Amt	Y5 Amt	Add
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18	
1110	102199	533120	GENERAL OFFICE SU...			\$3,500.00	<input checked="" type="checkbox"/>	\$2,000.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	
1110	102199	533210	FACILITY AND HARD...			\$200.00	<input type="checkbox"/>	\$100.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	
1110	102199	533310	VEHICLE EQUIPMENT...			\$6,000.00	<input checked="" type="checkbox"/>	\$6,000.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	

Step 91: The rows will sort in Fund Code, Cost Center, Account Number order, ascending. Click a second time and they will resort in descending order.

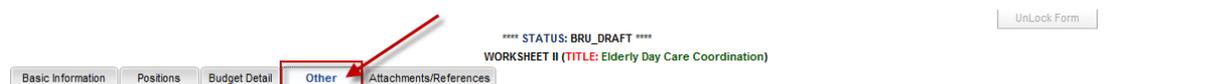
Step 92: If a row has been selected for edit, by highlighting and clicking the Edit Row, but then no edit is necessary, or you have changed your mind, simply click the Cancel Edit to clear the Add/Edit row and to return the selected row to the grid, unchanged.

Edit Row		Remove Row(s)		Sort Rows		Cancel Edit							
1110	102199	533210	FACILITY AND H...			200	<input type="checkbox"/>	100	<input type="checkbox"/>	0	0	0	Update
Fund Code	Cost Center	Account Number	Account Description	Actual (2012-13)	Authorized (2012-13)	2013-14	Recurring	2014-15	Recurring	2015-16	2016-17	2017-18	
1110	102199	533120	GENERAL OFFICE SU...			\$3,500.00	<input checked="" type="checkbox"/>	\$2,000.00	<input checked="" type="checkbox"/>	\$0.00	\$0.00	\$0.00	
1110	102199	533210	FACILITY AND HARD...			\$200.00	<input type="checkbox"/>	\$100.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	
1110	102199	533310	VEHICLE EQUIPMENT...			\$6,000.00	<input checked="" type="checkbox"/>	\$6,000.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	

Step 93: When Requirements and/or Receipts entries are entered into the Worksheet II form, the data populates the Summary table at the bottom of the Budget Detail tab. The Summary table will add all Requirements entered in this form and display them in their appropriate category/year. The Summary table will also add and Receipts entered in this form and display them in their appropriate category/year. **The Change in Fund Balance row will then calculate Requirements minus Receipts and display those amounts in their appropriate categories/years.** NOT TRUE? Note zeros showing above in Change in Fund Balance row.

Summary							
	Actual (2011-12)	Authorized (2012-13)	2013-14	2014-15	2015-16	2016-17	2017-18
Total Requirements	\$0.00	\$0.00	\$9,700.00	\$8,100.00	\$0.00	\$0.00	\$0.00
Total Receipts	\$0.00	\$0.00	\$310.00	\$75.00	\$0.00	\$0.00	\$0.00
Change in Fund Balance	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

Step 94: Move to the top of the WSII form and click on the Other tab to bring that portion of the Worksheet to the forefront.



Step 95: The Other tab presents seven categories and seven questions with Yes/No answer choices. Upon first accessing a new form, neither answer will be chosen. Once an answer is selected, you cannot revert back to no answer, the answer must be Yes or No.

WorkSheet II

**** STATUS: BRU_DRAFT ****

WORKSHEET II (TITLE: Elderly Day Care Coordination)

UnLock Form

Basic Information | Positions | Budget Detail | **Other** | Attachments/References

Screen ID : **WSII-4**
IBIS ID : **7ILK**

Additional Resources
Does this request require additional resources from another agency? : Yes No

Impact on Local Government(s)
Does this change impact local government(s)? : Yes No

Statutory Changes
Are statutory changes or special provisions required to implement the request? : Yes No

Capital Improvements
Does this expansion request relate to a capital improvement project? : Yes No

Space Requirements (G.S. 120-36.7 C)
Does this request require additional space? : Yes No

Motor Pool Requirements
Does this request require additional vehicles from the state motor pool? : Yes No

IT Component Requirements
Does this request include an IT component? : Yes No

Export PDF | Save Draft | Save & Close | Ready To Submit | Delete Request

Step 96: Answering No on any of the questions completes the question.

Additional Resources

Does this request require additional resources from another agency? : Yes No

Impact on Local Government(s)

Does this change impact local government(s)? : Yes No

Statutory Changes

Are statutory changes or special provisions required to implement the request? : Yes No

Capital Improvements

Does this expansion request relate to a capital improvement project? : Yes No

Space Requirements (G.S. 120-36.7 C)

Does this request require additional space? : Yes No

Motor Pool Requirements

Does this request require additional vehicles from the state motor pool? : Yes No

IT Component Requirements

Does this request include an IT component? : Yes No

Step 97: Answering Yes to any of the questions opens up a sub-question that requires additional response.

Additional Resources

Does this request require additional resources from another agency? : Yes No

Name the agency and the funds required

Add Agency and Funds Requested		Remove Agency and Funds Requested	
Agency Name		Funds Requested	
No items to show.			

Impact on Local Government(s)

Does this change impact local government(s)? : Yes No

If YES, Please explain the impact to local governments? :

Statutory Changes

Are statutory changes or special provisions required to implement the request? : Yes No

If YES, attach a copy of the draft legislation :

Capital Improvements

Does this expansion request relate to a capital improvement project? : Yes No

If YES, give title of C.I. Project :

C.I. Budget Code :

Item Number :

Projected Completion Date : Nov 6 2012

Space Requirements (G.S. 120-36.7 C)

Does this request require additional space? : Yes No

Type of Space : Office Storage Other

Details	2013-14	2014-15	2015-16	2016-17	2017-18
Additional Square Footage Required	0	0	0	0	0
Estimated Cost of Space Requirements	\$0	\$0	\$0	\$0	\$0

Motor Pool Requirements

Does this request require additional vehicles from the state motor pool? : Yes No

If YES, how many? :

IT Component Requirements

Does this request include an IT component? : Yes No

If required per OSBM budget instructions, has the project been entered into the ITS PPM tool? : Yes No

Step 98: The first category on the Other tab is Additional Resources. This category asks the question: Does this request require additional resources from another agency? Y/N. If your answer is Yes, a request for detail appears for you to Name the agency and the funds required.

Additional Resources

Does this request require additional resources from another agency? : Yes No

Name the agency and the funds required

Add Agency and Funds Requested		Remove Agency and Funds Requested	
Agency Name		Funds Requested	
No items to show.			

Step 99: Click on the Add Agency and Funds Requested button and a row will populate the box below the button.

Additional Resources

Does this request require additional resources from another agency? : Yes No

Name the agency and the funds required



Add Agency and Funds Requested		Remove Agency and Funds Requested	
Agency Name		Funds Requested	
<input type="text"/>		<input type="text"/>	

Step 100: Click on the dropdown arrow in the row and a list of State Agencies will be displayed. Click on the appropriate Agency and it will populate the field and the dropdown box will disappear.

Name the agency and the funds required

Add Agency and Funds Requested		Remove Agency and Funds Requested	
Agency Name		Funds Requested	
<ul style="list-style-type: none"> Administrative Office of the Courts Department of Administration Department of Agriculture and Consumer Services Department of Commerce Department of Correction Department of Crime Control and Public Safety Department of Cultural Resources Department of Environment and Natural Resources Department of Health and Human Services Department of Insurance Department of Justice Department of Juvenile Justice and Delinquency Prevention Department of Labor Department of Public Safety Department of Revenue Department of Secretary of State Department of State Treasurer Department of Transportation Employment Security Commission 			

Additional Resources

Does this request require additional resources from another agency? : Yes No

Name the agency and the funds required

Add Agency and Funds Requested		Remove Agency and Funds Requested	
Agency Name		Funds Requested	
Department of Juvenile Justice and Delinquency Prevention			

Step 101: Tab to the Funds Requested field and enter the amount required of the other agency.

Additional Resources

Does this request require additional resources from another agency? : Yes No

Name the agency and the funds required

Add Agency and Funds Requested		Remove Agency and Funds Requested	
Agency Name		Funds Requested	
Department of Juvenile Justice and Delinquency Prevention		\$8,000.00	

Step 102: Repeat this process as many times as appropriate for this Worksheet II request.

Step 103: To remove an Agency listed, highlight the appropriate row, and click the Remove Agency and Funds Requested button.

Additional Resources

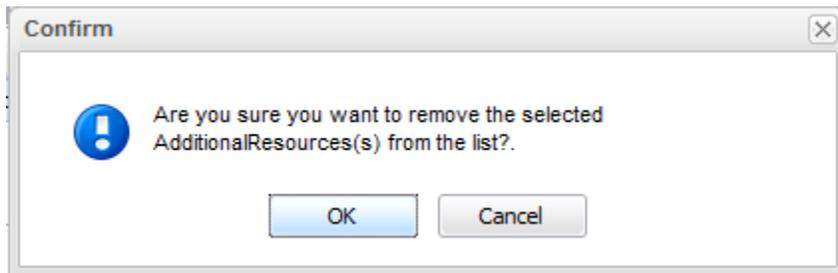
Does this request require additional resources from another agency? :

Yes No

Name the agency and the funds required

Add Agency and Funds Requested		Remove Agency and Funds Requested
Agency Name	Funds Requested	
Department of Juvenile Justice and Delinquency Prevention	\$8,000.00	

Step 104: A delete confirmation window will appear



Step 105: Click the Cancel button if you do not wish to remove the selected row. Click the OK button if you do wish to remove the selected row.

Step 106: If you click Cancel, the Confirm window will close and the list will remain the same. If you click the OK button, the Confirm window will close and the selected row will be removed from the table.

Step 107: The second category on the Other tab is Impact on Local Government(s). This category asks the question: Does this change impact local government(s)? Y/N. If your answer is Yes, a request for detail appears for you to Please explain the impact to local governments.

Impact on Local Government(s)

Does this change impact local government(s)? :

Yes No

If YES, Please explain the impact to local governments? :

Step 108: Type or paste text in the field to explain the impact the request will have on local government(s).

Step 109: The third category on the Other tab is Statutory Changes. This category asks the question: Are statutory changes or special provisions required to implement the request? Y/N. If your answer is Yes, a request for detail appears for you to attach a copy of the draft legislation.

Statutory Changes

Are statutory changes or special provisions required to implement the request? : Yes No

If YES, attach a copy of the draft legislation : Draft Legislation | 

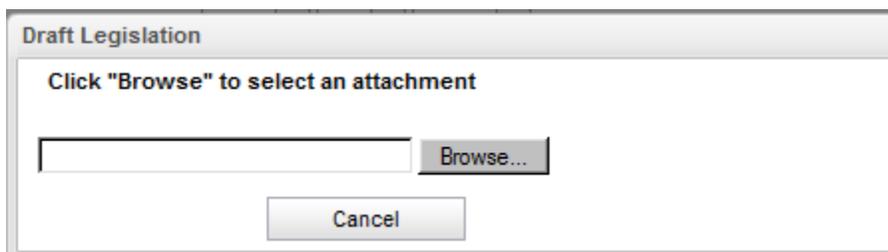
Step 110: To attach a document supporting this question, click on the green + button next to the words Draft Legislation.

Statutory Changes

Are statutory changes or special provisions required to implement the request? : Yes No

If YES, attach a copy of the draft legislation : Draft Legislation | 

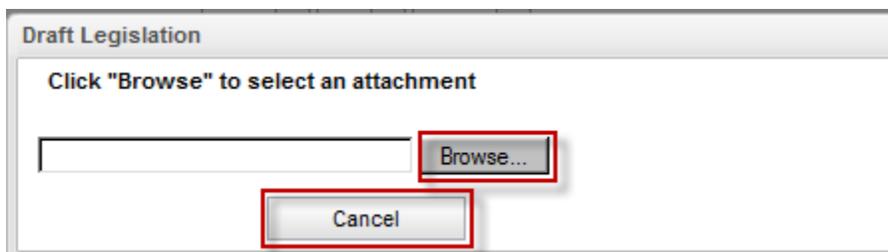
Step 111: A window will open to allow you to search for the supporting document required



Draft Legislation

Click "Browse" to select an attachment

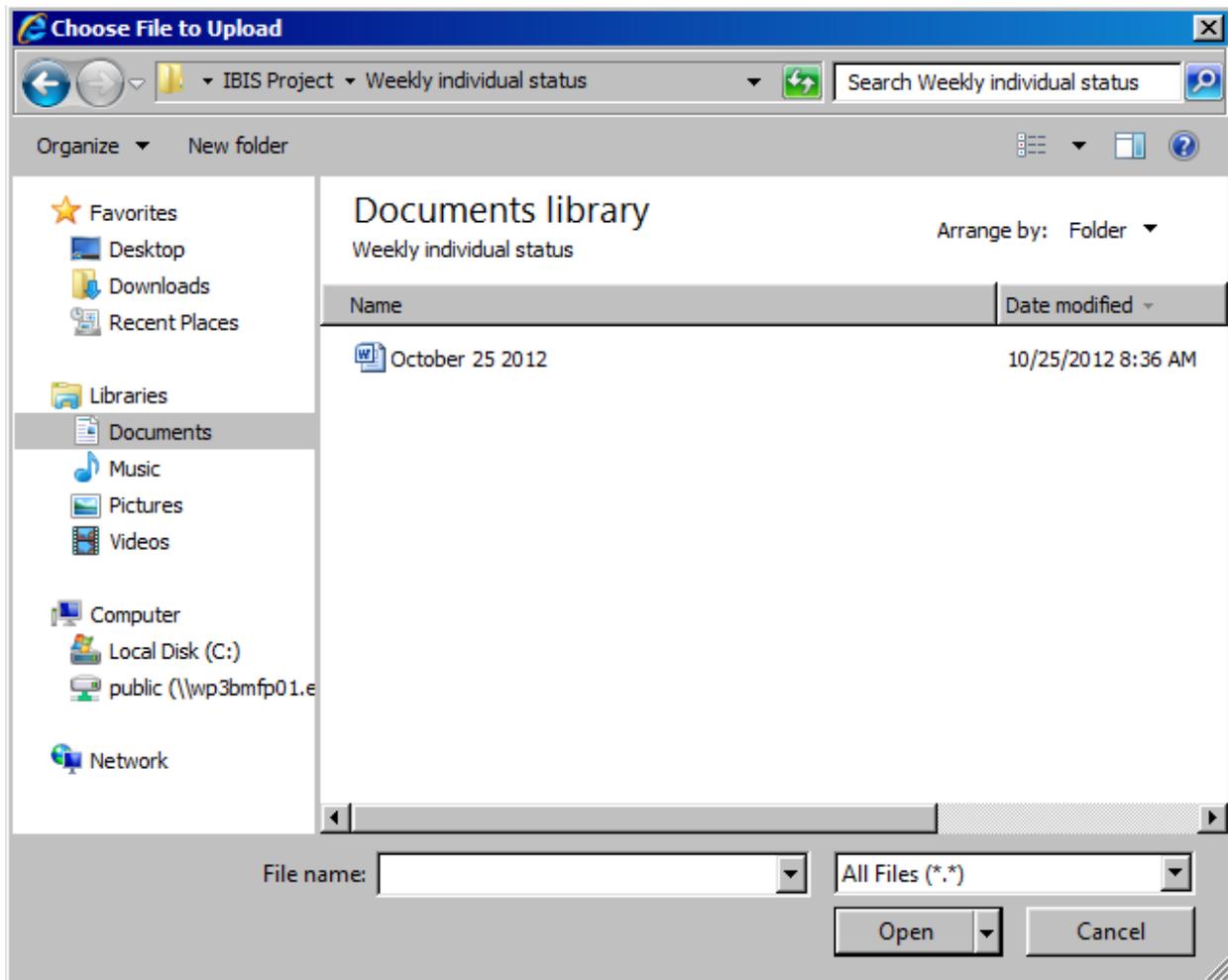
Step 112: Click on the browse button to find a document. Click on the Cancel button to close this window and cancel the search process.



Draft Legislation

Click "Browse" to select an attachment

Step 113: Clicking on the Browse button will cause a drive search window to open.



Step 114: Navigate to the file you want to attach, highlight it and click on the open button. The upload window will close and you will be returned to the Worksheet II Other tab with the attached document listed under the Statutory Changes category.

Statutory Changes

Are statutory changes or special provisions required to implement the request? :

Yes No

If YES, attach a copy of the draft legislation :

Draft Legislation

 C:\Users\ke Crawford\Documents\IBIS Project\Weekly individual status\October 25 2012.docx

Step 115: The fourth category on the Other tab is Capital Improvements. This category asks the question: Does this expansion request relate to a capital improvement project? Y/N. If your answer is Yes, requests for

detail appear for you to identify the title of the Capital Improvement project, the Capital Improvement Budget Code, the Item Number and the Project Completion Date for the related Capital Improvement project.

Capital Improvements

Does this expansion request relate to a capital improvement project? : Yes No

If YES, give title of C.I. Project:

C.I. Budget Code:

Item Number:

Projected Completion Date: Nov 6 2012

Step 119: Fill in the Completion date for the related Capital Improvement project in the Projected Completion Date fields

Capital Improvements

Does this expansion request relate to a capital improvement project? : Yes No

If YES, give title of C.I. Project:

C.I. Budget Code:

Item Number:

Projected Completion Date: Nov 6 2012

Step 120: The fifth category on the Other tab is Space Requirements. This category asks the question: Does this request require additional space? Y/N. If your answer is Yes, requests for detail appear for you to identify the type of space, the additional square footage required and the estimated cost of space requirements across five fiscal years upcoming.

Space Requirements (G.S. 120-36.7 C)

Does this request require additional space? : Yes No

Type of Space : Office Storage Other

Details	2013-14	2014-15	2015-16	2016-17	2017-18
Additional Square Footage Required	0	0	0	0	0
Estimated Cost of Space Requirements	\$0	\$0	\$0	\$0	\$0

Step 121: Address the Type of Space query by selecting one option from the three choices of Office, Storage or Other space.

Type of Space : Office Storage Other

Step 122: To enter numbers in the Additional Square Footage Required fields, double click on the row and the fields will become editable. Enter data as appropriate across the row under each fiscal year.

<u>Details</u>	2013-14	2014-15	2015-16	2016-17	2017-18
<u>Additional Square Footage Required</u>					
<u>Estimated Cost of Space Requirements</u>	\$0	\$0	\$0	\$0	\$0

<u>Details</u>	2013-14	2014-15	2015-16	2016-17	2017-18
<u>Additional Square Footage Required</u>	2000	2000	5000	5000	0
<u>Estimated Cost of Space Requirements</u>	\$0	\$0	\$0	\$0	\$0

Step 123: To enter numbers in the Estimated Cost of Space Requirements fields, double click on the row and the fields will become editable. Enter data as appropriate across the row under each fiscal year. When you move out of the Details grid, the Cost numbers will format as Dollars.

<u>Details</u>	2013-14	2014-15	2015-16	2016-17	2017-18
<u>Additional Square Footage Required</u>	2000	2000	5000	5000	0
<u>Estimated Cost of Space Requirements</u>					

<u>Details</u>	2013-14	2014-15	2015-16	2016-17	2017-18
<u>Additional Square Footage Required</u>	2000	2000	5000	5000	0
<u>Estimated Cost of Space Requirements</u>	\$30,000	\$30,000	\$65,000	\$65,000	\$0

Step 124: The sixth category on the Other tab is Motor Pool Requirements. This category asks the question: Does this request require additional vehicles from the state motor pool? Y/N. If your answer is Yes, a request for how many additional vehicles appears.

Motor Pool Requirements

Does this request require additional vehicles from the state motor pool? : Yes No

If YES, how many? :

Step 125: Enter a number in the field appropriate for the Worksheet II request you are developing.

Motor Pool Requirements

Does this request require additional vehicles from the state motor pool? : Yes No

If YES, how many? :

Step 126: The seventh and final category on the Other tab is IT Component Requirements. This category asks the question: Does this request include an IT component? Y/N. If your answer is Yes, a request stating, If required per OSBM budget instructions, has the project been entered into the ITS PPM tool? Y/N.

IT Component Requirements

Does this request include an IT component? : Yes No

If required per OSBM budget instructions, has the project been entered into the ITS PPM tool? : Yes No

Step 127: Answer the Second IT Component Requirements question appropriately.