2007 Guide to Web-Based Fiscal Notes for State Agencies

Legislative Budget Board
Eightieth Legislative Session

January 2007

This guide was prepared by the Estimates and Revenue staff of the Legislative Budget Board.
For additional copies, please access our website at www.lbb.state.tx.us
or contact us at (512) 936-4033.

Cover Photo Courtesy of House Photography

Contents

Web-based Fiscal Notes for State Agencies

1. Introduction

This section serves as a guide to the screens of the Fiscal Notes system used by Texas state agencies To access Fiscal Notes over the internet, go to the LBB website - www.lbb.state.tx.us. Then click on *Fiscal Notes Data Entry.*

E-mail Notification: You will receive an e-mail requesting a cost estimate. You can click the link on the e-mail to enter information for *that particular* cost estimate, or you can access it through the *Wks* (worksheet) button (see page 3).

<u>Important Note</u>: If you are typing your cost estimate, make sure to click the *Save* button before 20 minutes elapse. The system "times out" after 20 minutes, and unsaved data is lost. Typing text does not keep the system from timing out.

2. General Operation

- Click the blue arrows to display a greater level of detail. Click them again to hide details and give yourself more room to work.

- The *Hide Navigation* button in the *Wks* area also simplifies the screen and gives you more room. Click *Show Navigation* to redisplay the navigation buttons.

- Most screens feature *Page Break* check boxes for organizing and formatting hard-copy reports.

- The blue buttons in the *Wks* area enable you to format text in Fiscal Notes after you paste it in from another application. Highlight the text before formatting. There are also keyboard shortcuts.

ctrl + C	copy
ctrl + V	paste
ctrl + X	cut
ctrl + B	bold (on/off toggle)
ctrl + U	underline (on/off toggle)
ctrl + I	italics (on/off toggle)

<u>Important Note</u>: Pasting in Text - When you copy text from another document to paste into the text fields of Fiscal Notes, it must be copied from a document with portrait orientation at 100% magnification.

3. Obtaining Your User ID and Password

To obtain a Fiscal Notes user ID and password, go to the LBB website - www.lbb.state.tx.us. Click on *Fiscal Notes Logon Request Form* and fill in the requested information. You will be required to provide your agency name, your three-digit agency code, your name, phone number, FAX number, and e-mail address.

Click the *Submit* button to send your request to the LBB. Your user ID and password will be sent to you by e-mail.

Fiscal Notes Help Desk

If you have questions or need help, call the Fiscal Notes pager number at (512) 936-4033. Someone will return your call promptly.

You can also reach the help desk by e-mail: notes.support@lbb.state.tx.us.

4. Displaying Worksheets and Impact Statements

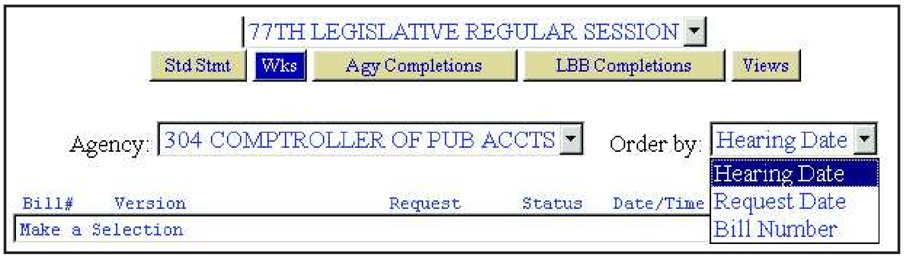


FIGURE 1: SELECTION CRITERIA

• Click the *Wks* button to display the drop-down list for selecting the bill and the Fiscal Note or Impact Statement you want to work with. The *Agency* drop-down list will only display your agency.
• Use the *Order by* drop down list to choose the way you want the list of your agency's bills to display. You may arrange them by Hearing Date, Request Date, or Bill Number.

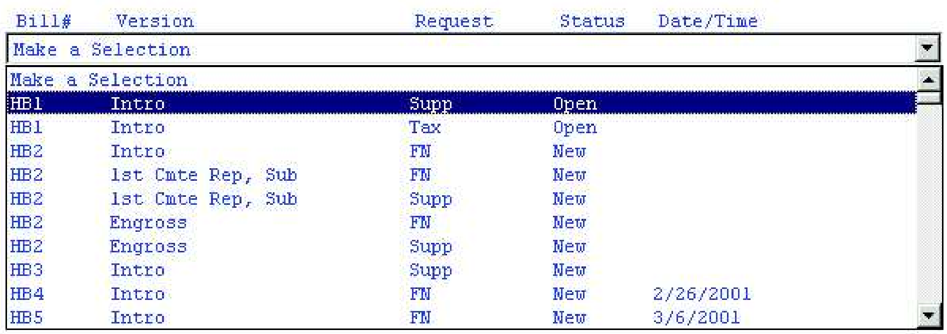


FIGURE 2: BILL LIST ORDERED BY HEARING DATE

• Click on the drop-down list, and then use the scroll bar at the right to find your bill. A single bill may have a Fiscal Note and several Impact Statements associated with it.
• Click on the Fiscal Note or Impact Statement you want to work on.

In the *Status* column, *New* means that no one from your agency has accessed the worksheet yet. *Open* means someone at your agency has accessed the worksheet and entered some data.

Note: When you complete the worksheet and send it to the LBB, it will drop off this list.

5. Paste-in Worksheet

There are three formats of agency Fiscal Note worksheets: Paste-in, NFI (no fiscal implication) and Wks (worksheet with tables). When you choose a Fiscal Note from the drop-down list, the buttons for choosing these formats are displayed at the bottom of the screen. As the name suggests, a Paste-in worksheet simply enables you to paste (or type) your cost estimate information into the system. The system defaults to the Paste-in format for a new Fiscal Note worksheet.

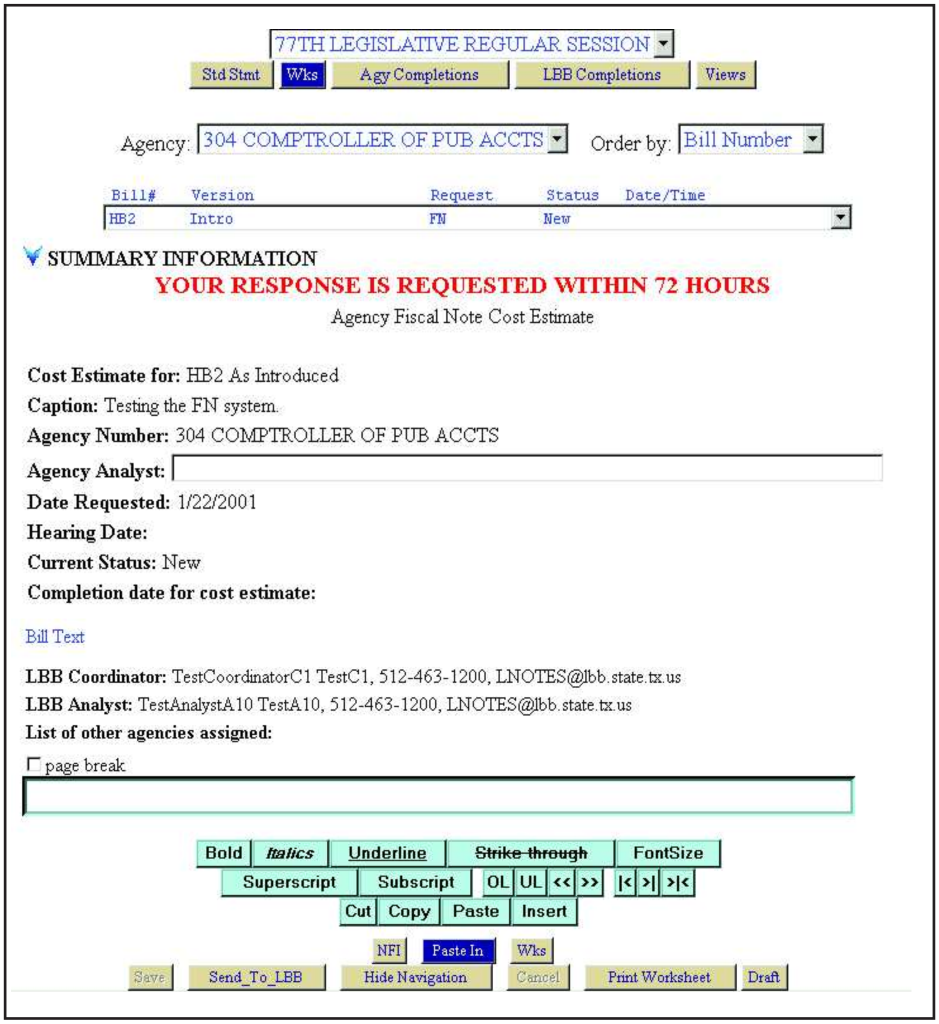


FIGURE 1: EXPANDED PASTE-IN VIEW

- Type the name of your agency analyst in the *Agency Analyst* field at the middle of the screen.
- Paste your cost estimate information into the text box just above the blue formatting buttons near the bottom of the screen. You may also type it in. Cost estimates done in Excel, Word, WordPerfect, or other software can be pasted in here. Anything pasted into this field must have a portrait orientation.

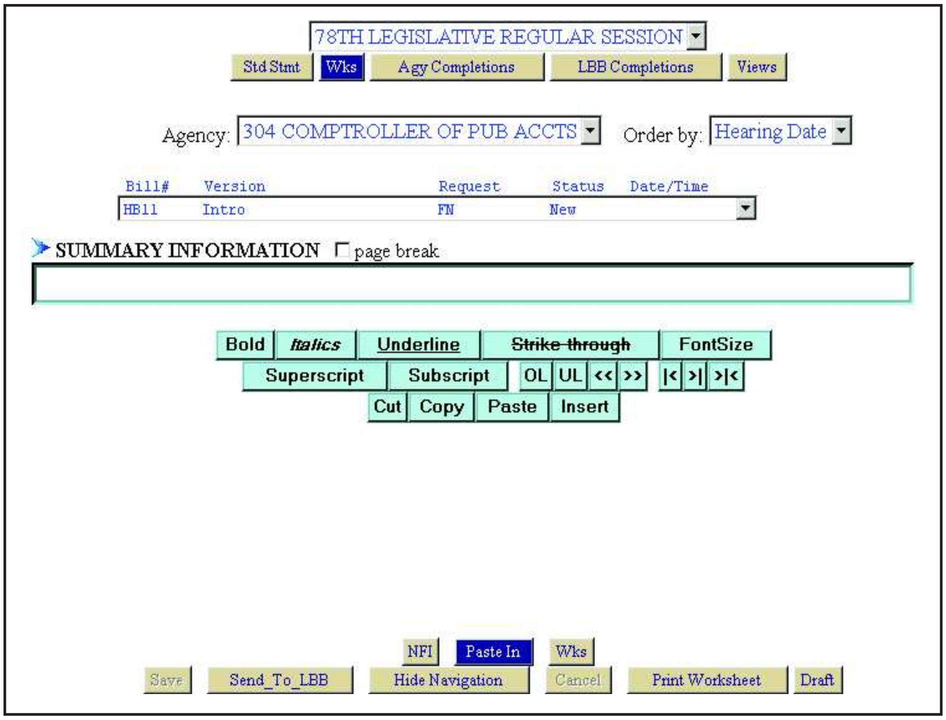


FIGURE 2: COLLAPSED PASTE-IN VIEW

This simplified view is available by clicking on the blue arrow to the left of *Summary Information.* To restore the summary information to the screen, click on the blue arrow again.

Text Formatting Buttons: Use the blue buttons to format the text you paste or type into the text box. Your options include bold, italics, underline, strikethrough, superscript, subscript, and font size. Highlight the text you want to work with, and then click the appropriate button.

Worksheet Format Choice Buttons: There are two rows of tan buttons at the bottom of the screen. The upper row is used to select the type of worksheet you want to use: NFI, paste-in, or Wks table.

Task Buttons: Use the appropriate button from the bottom row of tan buttons when you have finished entering your data.

- Click *Save* when you are finished entering your data. If you started with a new worksheet, its status changes to open. Remember to click this button periodically if you think your work on this screen will take more than 20 minutes.

- Click *Send to LBB* when you are completedly finished with your work. Clicking *Send to LBB* changes the status of the worksheet from open (or new) to complete and removes it from the selection list. The worksheet must then be opened by the LBB.

- Click *Hide Navigation* if you want to hide the navigation buttons at the top of the screen to give yourself more room to work.

Task Buttons (continued)

- Click *Cancel* if you do not want to save the most recent changes that you have made.

- Click *Print Worksheet* to generate a hard copy of this screen and your cost estimate.

- Click *Draft* to see how the worksheet will appear when you are finished entering data. The HTM document opens in a new window. Close it separately.

Collapse Function: Click on the arrow to hide the summary information and obtain more space. Click the arrow again to display the summary information.

6. No Fiscal Implication

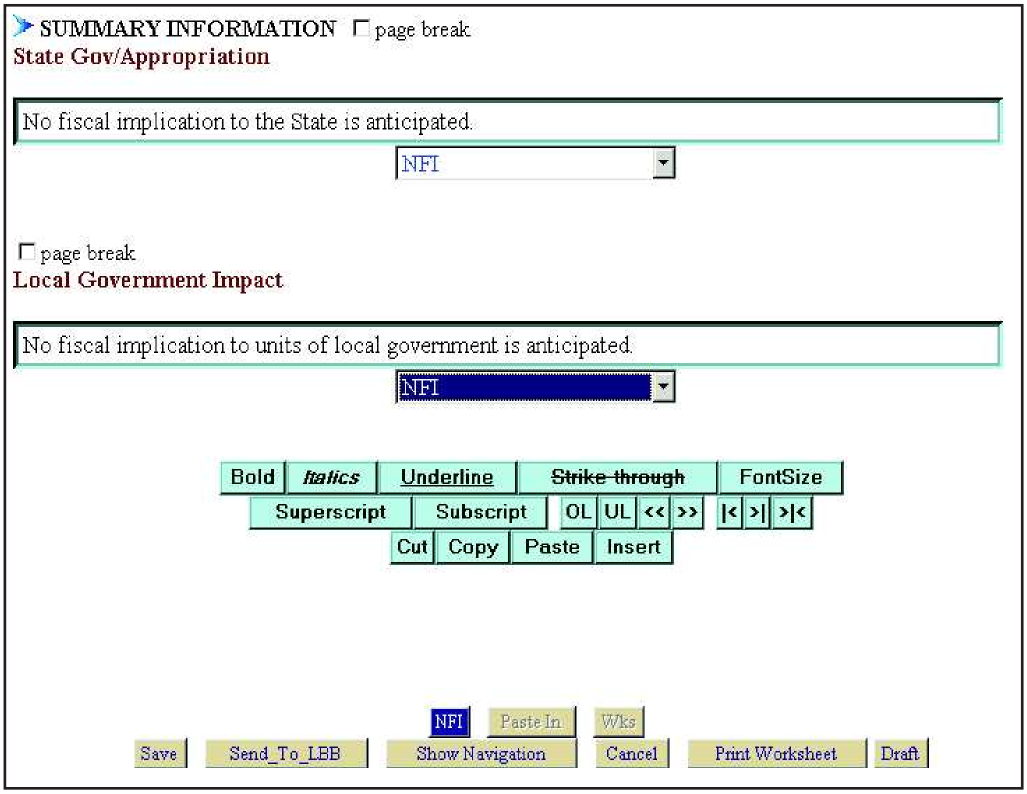


FIGURE 1: COLLAPSED VIEW (summary information and navigation buttons concealed)

The NFI (no fiscal implication) format for a worksheet enables you to select a standard statement for the *State Gov / Appropriation* and *Local Government Impact* fields without having to type in them. This illustration shows the screen with both the navigation buttons and summary information hidden. To restore the complete, detailed view, click the *Show Navigation* button at the bottom of the screen and the blue triangle to the left of *Summary Information* at the top of the screen.

Agency Analyst: The *Agency Analyst* text field is only visible in the *Summary Information* view. Switch between the Collapsed and Summary Information views by clicking the blue triangle at the top left of the screen.

***Select Standard Statement* Selection Menus:** Both the *State Gov / Appropriation* and *Local Government Impact* text boxes are equipped with drop-down lists to fill them with standard, no-fiscal implications statements. Click on the drop-down list(s) and choose *NFI.* **Click the tan *NFI* button at the bottom to get to this screen.**

At your discretion, you may type or paste-in additional information in these fields.

7. Worksheets with Detailed Tables

To display the detailed table worksheet, click the *Wks* button at the bottom of the screen. When you do this, the *Set Tables* button becomes available, which is used to access an area for adding more rows. See the Set Tables instructions that follow this section for more information.

It takes a lot of scrolling to see the entire table worksheet, so we will discuss it in parts. The Summary Information and Navigation buttons are hidden for the following examples.

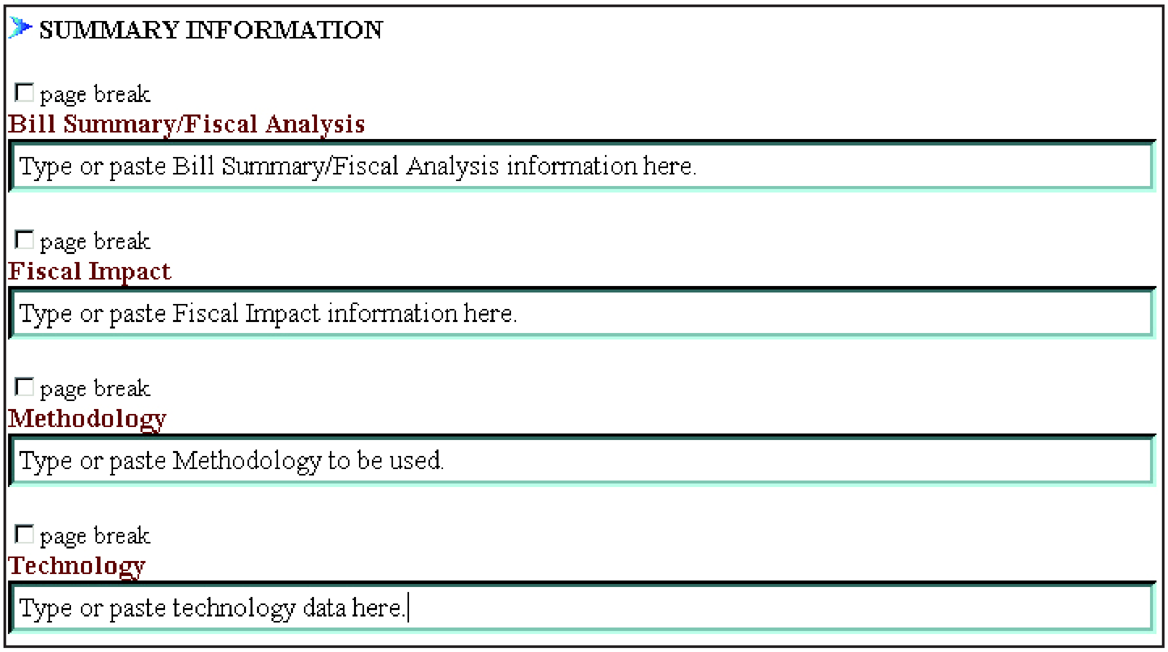


FIGURE 1: TEXT FIELDS

Text Fields: The fields in Figure 1 (*Bill Summary/Fiscal Analysis, Fiscal Impact, Methodology, and Technology)* are text fields. Paste in your text, or type it into these fields. Remember to click the *Save* button frequently because Fiscal Notes “times out” after 20 minutes, and all unsaved data is lost. Blue formatting buttons for your text are displayed at the bottom of the screen. Highlight the text you want to format, and then click the appropriate button.

There are no character limits for these text fields, but your statements should be no more than four pages long.

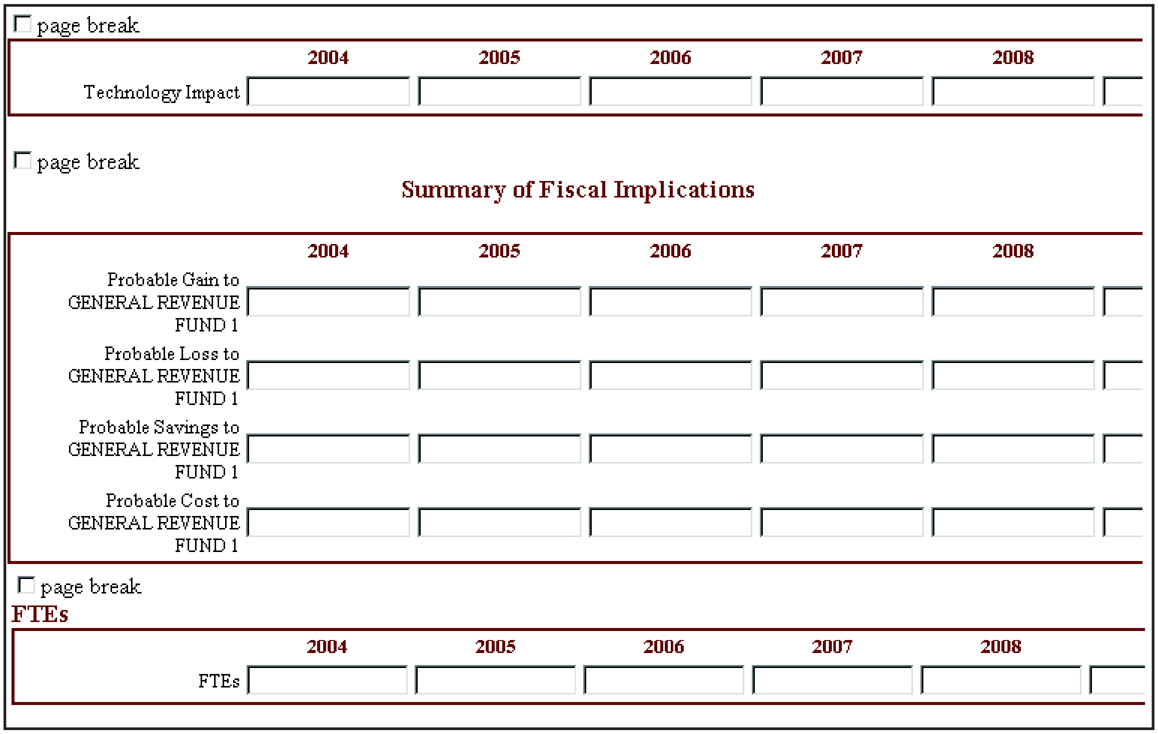


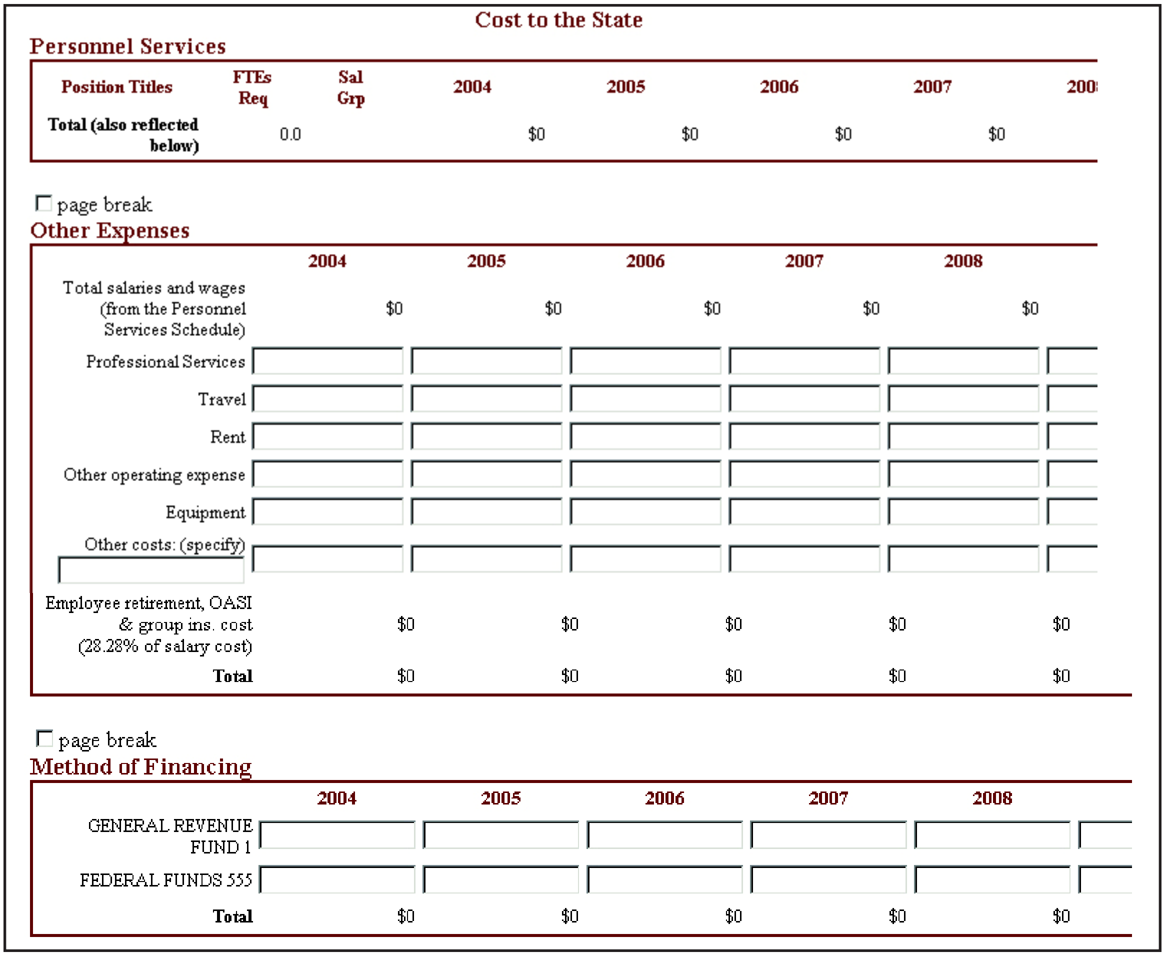
FIGURE 2: TECHNOLOGY IMPACT, SUMMARY OF FISCAL IMPLICATIONS, AND FTES

Technology Impact: Enter the projected technology cost for the bill (in dollars).

Summary of Fiscal Implications: Enter the dollar amounts of the fiscal implications to the General Revenue Fund. The fields in which to enter probable gains, losses, savings, and costs are clearly labeled. Use the *Set Tables* button at the bottom to access a screen that allows you to add rows to these tables (see page 12).

FTEs: Enter the projected change in the number of full-time employees needed to implement the provisions of the bill.

Important Note: You may either place a minus sign in front of your Probable Losses and Probable Costs or put parenthesis on either side of them.



Cost to the State

Personnel Services

Position Titles	FTEs Req	Sal Grp	2004	2005	2006	2007	200
Total (also reflected below)	0.0		$0	$0	$0	$0	

☐ page break

Other Expenses

	2004	2005	2006	2007	2008	
Total salaries and wages (from the Personnel Services Schedule)	$0	$0	$0	$0	$0	
Professional Services						
Travel						
Rent						
Other operating expense						
Equipment						
Other costs: (specify)						
Employee retirement, OASI & group ins. cost (28.28% of salary cost)	$0	$0	$0	$0	$0	
Total	$0	$0	$0	$0	$0	

☐ page break

Method of Financing

	2004	2005	2006	2007	2008	
GENERAL REVENUE FUND 1						
FEDERAL FUNDS 555						
Total	$0	$0	$0	$0	$0	

FIGURE 3: PERSONNEL SERVICES, OTHER EXPENSES, AND OTHER COSTS

Personnel Services: The *Personnel Services* portion of the tables does not automatically display rows as *Summary of Fiscal Implications* and *Method of Financing* do. To insert data entry rows and cells in this area, you must click the *Set Tables* button in the task area at the bottom, specify *Personnel Services* by clicking its radio button, and then decide on how many rows you want. See the Set Tables instructions that follow this section.

Other Expenses: Fill in your cost in dollars for the expense types listed. Use the *Other Costs* text field to specify an expense not listed.

Other Costs: The *Other Costs* field is located at the bottom left of the *Other Expenses* area. Use this field to specify costs other than those listed in the *Other Expenses* table.

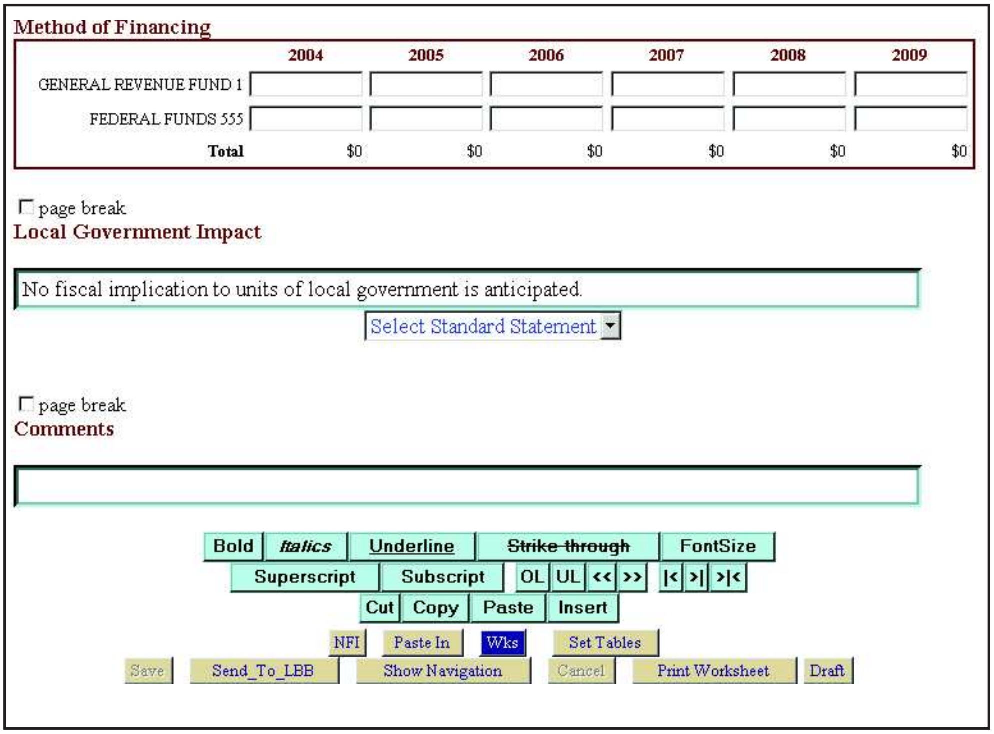


FIGURE 4: METHOD OF FINANCING, LOCAL GOVERNMENT IMPACT, AND COMMENTS

Method of Financing: Enter your dollar amounts per method of financing. For additional rows, use the *Set Tables* function. See the instructions following this section.

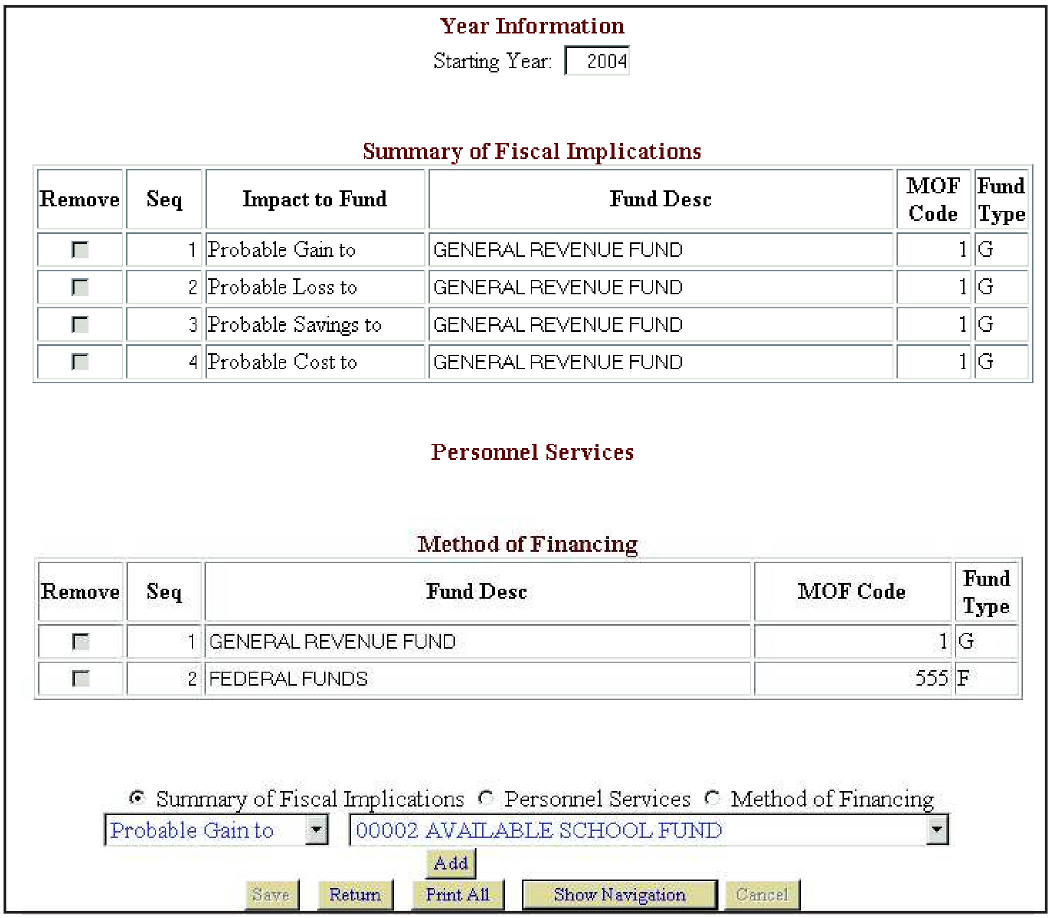
Local Government Impact: Use this text field to describe the projected impact to the local government.

Comments: Use this field to enter any comments not covered by the other text fields.

Set Tables Button: Click this button to access the area used to create additional rows for your tables. Refer to the next page for instructions.

8. The Set Tables Function

The *Set Tables* function allows you to add more rows to the tables of the Fiscal Notes worksheet. The screen shown below was accessed by clicking the *Set Tables* button at the bottom of the page while working in the *Wks* format. Note that the *Summary of Fiscal Implications* area displays four rows by default on the table worksheet, and the *Method of Financing* area displays two rows. These are permanent rows that cannot be removed. To illustrate the operation of the *Set Tables* function, on the next page we will add rows to the *Personnel Services* table.


Year Information

Starting Year: 2004

Summary of Fiscal Implications

Remove	Seq	Impact to Fund	Fund Desc	MOF Code	Fund Type
	1	Probable Gain to	GENERAL REVENUE FUND	1	G
	2	Probable Loss to	GENERAL REVENUE FUND	1	G
	3	Probable Savings to	GENERAL REVENUE FUND	1	G
	4	Probable Cost to	GENERAL REVENUE FUND	1	G

Personnel Services

Method of Financing

Remove	Seq	Fund Desc	MOF Code	Fund Type
	1	GENERAL REVENUE FUND	1	G
	2	FEDERAL FUNDS	555	F

FIGURE 1: SET TABLES FUNCTION - OPENING SCREEN

Year Information: The starting year of the cost estimate.

Summary of Fiscal Implications: The default rows for entering probable gains, losses, savings, and costs to the General Revenue Fund. These rows cannot be deleted.

Method of Financing: The default rows for entering MOF data. These rows cannot be deleted.

Add Rows Radio Selection Buttons: Near the bottom of the screen, there are three radio buttons used to specify the type of row you want to add. Click in the appropriate button.

Drop-down Lists: A drop-down list specific to the radio button you choose is displayed. It contains all of the entry choices for the row you are creating. Choose the entry you want *before* you click the *Add* button at the bottom of the screen to add your row.

***Add* Button:** When you click this button, a row is added to the table you selected.

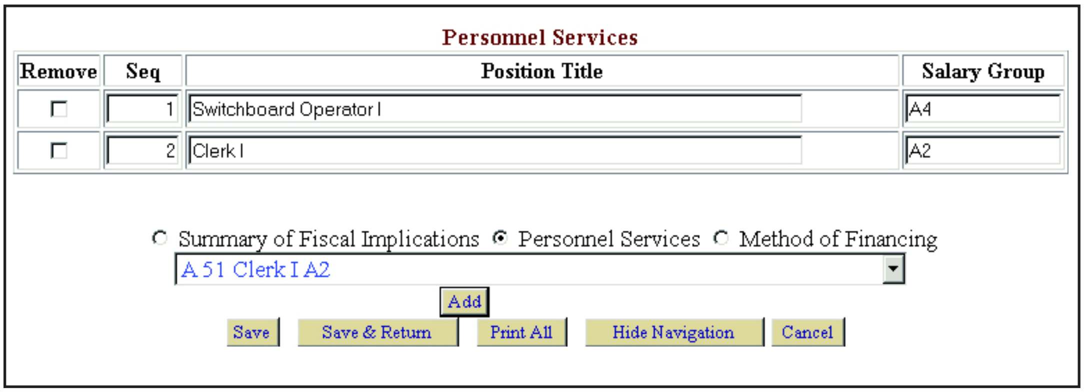


FIGURE 2: ADDED ROWS

New Rows: The new rows shown in the *Personnel Services* area of Figure 2 were added by (1) clicking the *Personnel Services* radio button at center near the bottom of the screen, (2) choosing the appropriate job description from the drop-down box, and (3) clicking the *Add* button. New rows are added one at a time.

***Remove* Check Box:** There is a *Remove* check box to the left of each new row. To remove a row you just added, click in this box. To remove a row that has already been saved, click in this box, and then upon your next save the row will be deleted.

***Save and Return* Button:** Click this button (located at the bottom left) to save the rows you added and return to the tables data-entry screen.

Re-ordering (Sorting) Rows: To change the order of the added rows (Figure 2), type the sequence in which you want them displayed in the *Seq* column (deleting the old numbers) and click *Save.*

9. Impact Statements

There are several types of Impact Statements in Fiscal Notes. All of them are easy to work with, having only an *Agency Analyst* and paste-in text field to complete. This example uses an Actuarial Impact Statement, chosen from the drop-down list accessed by clicking the *Wks* button at the top of the screen displayed when you first log on to Fiscal Notes. The composite illustration below (showing the entire screen after scrolling) displays the *Summary Information* area and the navigation buttons.

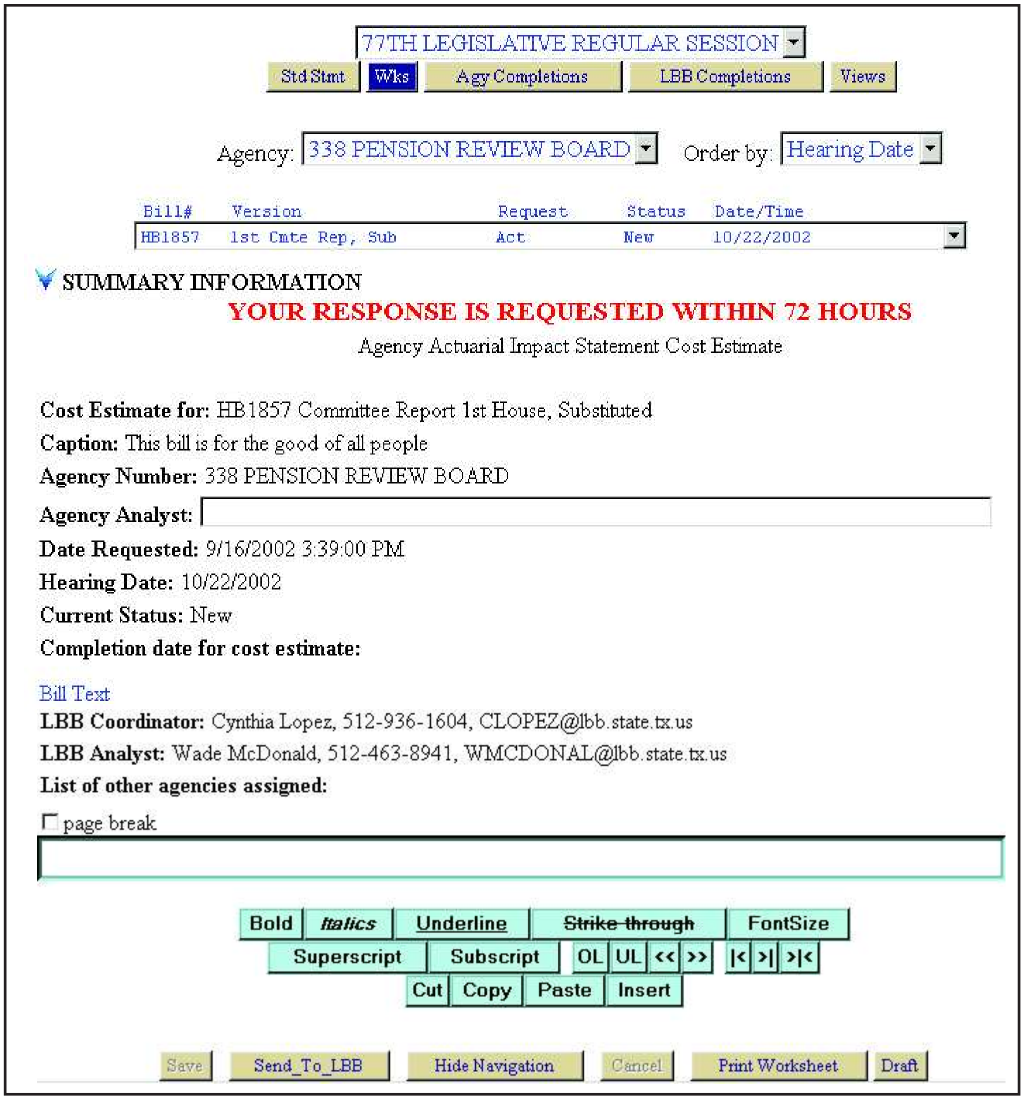


FIGURE 1: ACTUARIAL IMPACT STATEMENT - COMPOSITE VIEW

Agency Analyst: Type the name of your agency analyst in the text field in the middle of the *Summary Information* area.

Impact Statement Text Area: The field for entering your Impact Statement text is near the bottom of the screen, just above the text formatting buttons. You may either type or paste in your information. Remember to click the *Save* button before 20 minutes elapse or your typed information will be lost.

Text Formatting Buttons: Use the blue buttons to format the text you paste or type into the Impact Statement text area. Your options include bold, italics, underline, strikethrough, superscript, subscript, and font size. Highlight the text you want to work with, and then click the appropriate button.

Task Buttons: At the bottom of the screen, there is a row of buttons to use when you are finished working.

• Click *Save* when you are finished entering data, or before 20 minutes elapse. If you started out with a new impact statement, its status changes to open in the bill selection drop-down list you accessed by clicking the *Wks* button on the opening screen.

• Click *Send to LBB* when you are completely finished with your work. This changes the status of the worksheet from open (or new) to complete, and the bill is then removed from the drop-down list on the opening screen. The worksheet must then be opened by the LBB.

• Click *Cancel* if you do not want to save the most recent changes you have made.

• Click *Print Worksheet* to generate a hard copy of your Impact Statement.

• Click *Hide Navigation* if you want to hide the navigation buttons at the top of the screen to give yourself more room to work.

10. Agency Completions

Use the *Agy Completions* area of Fiscal Notes to view your completed Fiscal Notes and Impact Statements.

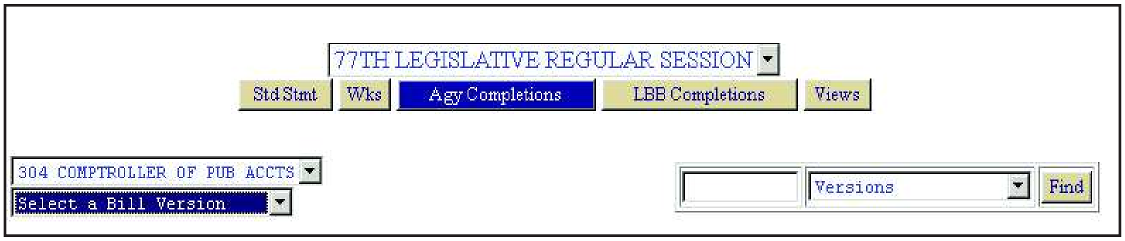


FIGURE 1: DOCUMENT SELECTION

Displaying Completed Documents: To display a completed document in HTM format, select it from the drop-down list labeled "*Select a Bill Version"* at the upper left of the screen. The document opens in a new window. Close it separately.

Searching for Specific Versions: You may look for a specific version of a cost estimate by using the search function at the upper right of the screen. (1) Type the number of the bill (SB1188, for example) in the box at the left. (2) Select the version you need from the *Versions* drop-down list. (3) Click the *Find* button.

FIGURE 2: DOCUMENT SELECTED

Selection Button: If the Impact Statement or Fiscal Note for the bill version you have chosen is complete, a highlighted selection button is displayed in the middle of the screen. Click on the button (FN in Figure 2) to display the document.

11. Agency Views

The *Views* area of Fiscal Notes provides you with an organized way of looking at the status of your cost estimates. Completed documents in HTM format can also be viewed and printed from this area.

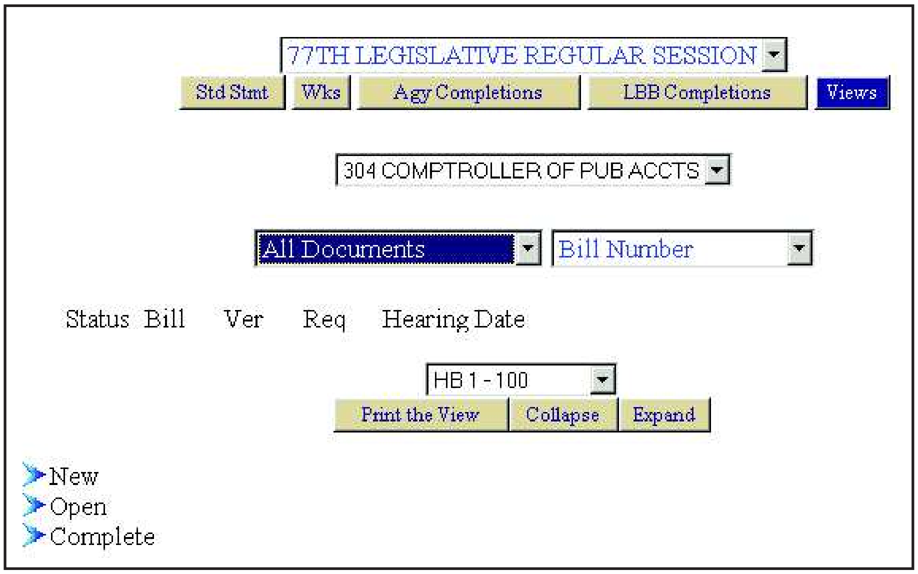


FIGURE 1: ALL DOCUMENTS VIEW

All Documents View: For this view, the drop-down list at the middle left of the screen is set to *All Documents.* At the bottom left, the *New, Open, and Complete* arrows are available to drill down and display lists of the Bills, Fiscal Notes, and Impact Statements relevant to the agency.

<u>Note</u>: When you drill all the way down to the Fiscal Note or Impact Statement using the *New* and *Open* arrows, the system takes you to the on-line worksheet. Drilling down with the *Complete* arrow takes you to a completed cost estimate in HTM format.

"Sort by" Drop-down List: The drop-down list at the middle right of the screen enables you to sort by Bill Number, Hearing Date, No Hearing Date Set, or Request Date. In Figure 1, it is set to Bill Number, which is the default setting. This causes the range drop-down list just below in the middle of the screen to display number ranges of bills. When a sorting method based on date this list is chosen, this drop-down list displays ranges of dates.

Range Drop-down List: The range drop-down list is in the center of the screen, just above the row of orange view option buttons. When set to *Bill Number* as a result of your choice in the *Sort By* drop-down list, a maximum of 100 bill numbers at a time may be displayed. Scroll through the range drop-down list to choose the bill range you need. The same principle applies to displaying documents by ranges of dates.

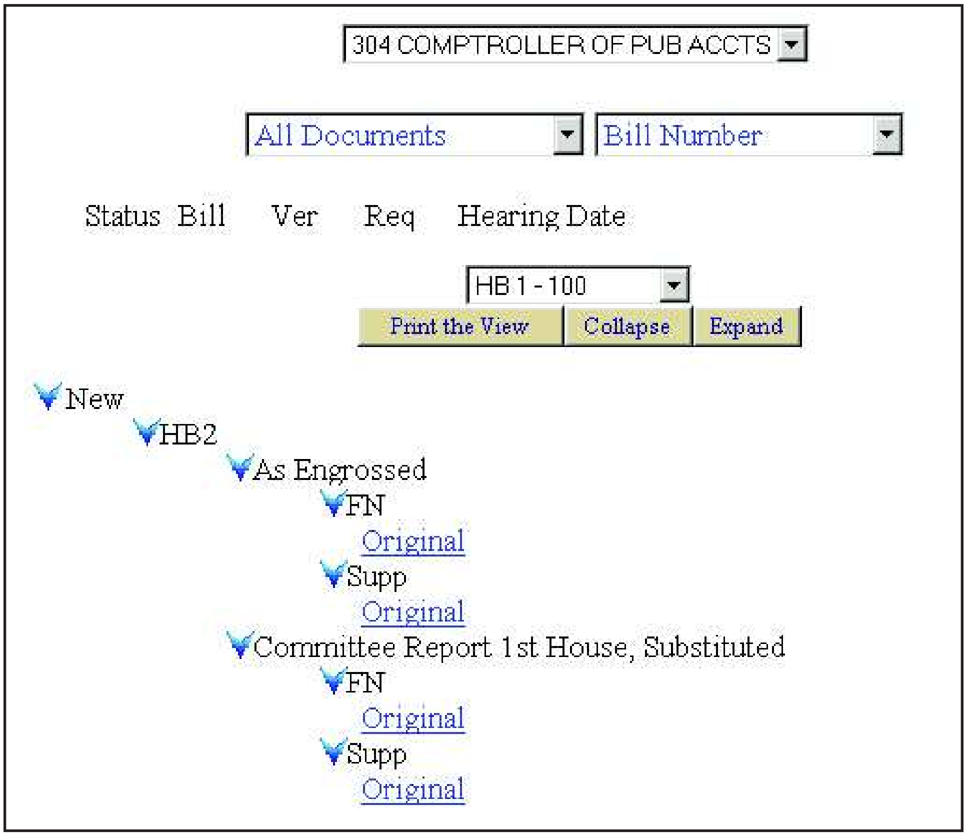


FIGURE 2: EXPANDED VIEW

Expanded View: Click the *Expand* button just below the range drop-down list to display the detailed outline of bills and documents shown in Figure 2.

Print the View: Click *Print the View* in the same row of buttons for a hard copy of the outline.

Collapse: Click the *Collapse* button to return to the view shown in Figure 1.

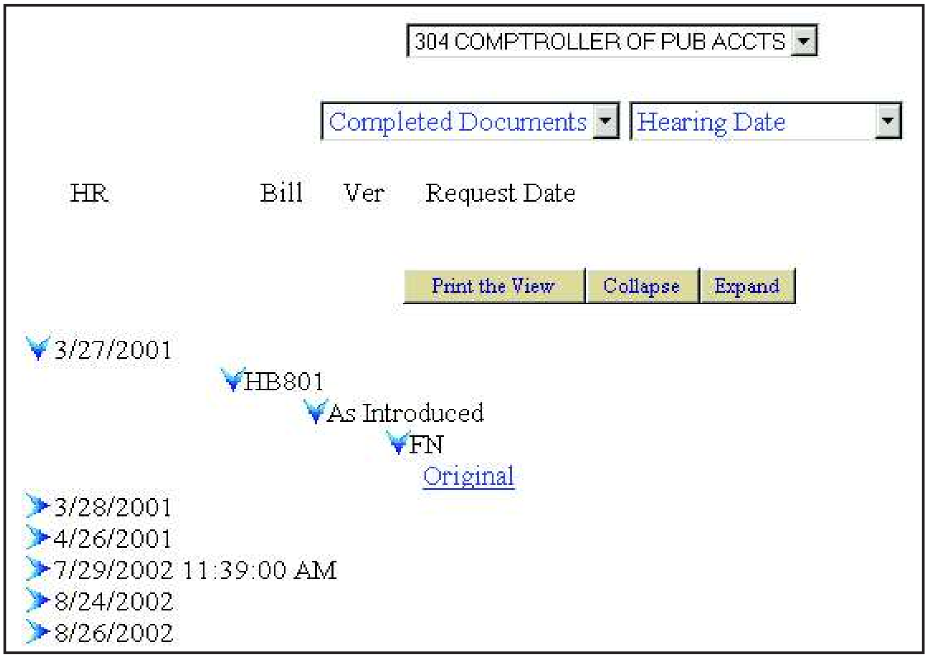


FIGURE 3: COMPLETED DOCUMENTS VIEW

Completed Documents View: For this view, the drop-down list at the middle left of the screen is set to *Completed Documents.* The sort-by drop-down list at its right is set to *Hearing Date,* resulting in a display of bills and their associated documents by hearing date at the lower left of the screen.

Figure 3 shows a "drill-down" displayed by clicking on the 3/27/2001 hearing date, and then clicking on the bill, bill version, and document type.

Note: When you drill down to the document level (the underlined link, *Original* in Figure 3) in the Completed Documents view, the system takes you to a completed cost estimate in PDF format.

Expanded View: Click the *Expand* button just below the range drop-down list to display a complete outline of bills and their associated documents organized by hearing date.

Print the View: Click *Print the View* in the same row of buttons for a hard copy of the outline.

Collapse: Click the *Collapse* button to hide the outline.