AGENCY TRAINING FOR FISCAL NOTES
Fiscal Notes Help Desk Number:  512-936-4033
Email Contact: LBB.Applications@lbb.state.tx.us

For immediate 24-7 response, please call the Fiscal Notes Help Desk Number. For less urgent issues, use the email contact. You should receive a response to your email by the end of the next business day.
# Committee Coordinators

**Scott Dudley – Manager, Estimates and Revenue Analysis**

<table>
<thead>
<tr>
<th>Name</th>
<th>Department</th>
</tr>
</thead>
<tbody>
<tr>
<td>Alison Gilliam</td>
<td>Business and Industry</td>
</tr>
<tr>
<td>Keisha Gray</td>
<td>State Affairs, Insurance, Transportation</td>
</tr>
<tr>
<td>Leanne Hernandez</td>
<td>Public Education</td>
</tr>
<tr>
<td>Kevin Kavanaugh</td>
<td>Fiscal Committees and High Education</td>
</tr>
<tr>
<td>Cindy Lopez</td>
<td>Health and Human Services</td>
</tr>
<tr>
<td>Kevin Kromenacker</td>
<td>Local Government</td>
</tr>
<tr>
<td>Kathryn Millington</td>
<td>Veterans, Senate Administration, Government Organization, Land Resource Management</td>
</tr>
<tr>
<td>Jason Thurkill</td>
<td>Judiciary</td>
</tr>
<tr>
<td>Scott Zaskoda</td>
<td>Natural Resources</td>
</tr>
</tbody>
</table>
Fiscal Notes Process

- Fiscal notes are called for in both the House and Senate Rules

- Fiscal notes are completed for bills that have been posted. On introduced bills, a fiscal note is required before the House hears it. In the Senate, a fiscal note is required before they vote the bill out. Our goal is to have the fiscal note completed before the committee starts.

- House has a 5 day posting rule. Senate has a 24 hour posting period.

- If a bill is assigned a hearing date, the coordinator will send you an email. The coordinator may put a due date on the fiscal note. That due date will generally be a day or two before the committee hearing.

- If a bill is amended or substituted in committee, another fiscal note is needed.
  - No turnaround deadline in House report
  - 72 hour turnaround deadline in Senate
    Our internal rule is 24 hours, if possible. The timeline may be shortened later in session.

- If the bill has entered the engrossed stage and there hasn’t been any changes, we can copy the fiscal note.

- If the bill goes through committee and there are amendments and substitutions, the fiscal notes process starts over again. There is a 24 hour turnaround. The bill goes to the floor of the 2nd house and an “As passed, 2nd house” fiscal note is needed.

- That bill then goes back to the 1st house to see if they accept 2nd house changes. If the changes are accepted, the process is complete. Otherwise, the bill goes through conference committee. If something new comes up in conference committee, a new fiscal note may be needed.
Sample Email of Assignment

- When the bill has been assigned to your agency, you will receive an email similar to the one below:

```
You have been requested to prepare a Fiscal Note cost estimate for HB539 - As Introduced

You can either logon to Fiscal Notes at http://fns.lbb.state.tx.us

or you can logon directly to this cost estimate at

http://fns.lbb.state.tx.us//FNSLogin.aspx?BillInfo=82~R~H~B~539~1~1~802
Hearing Date:
```

- The email will have two links. The first will take you to the Fiscal Notes Logon screen. After successfully logging in, you will need to browse to the cost estimate. If you click on the second link, the system will take you directly to the cost estimate after a successful login.
Logon Screen

- Below is the Fiscal Notes Logon screen.

- Type your username and password and click the Login button to log into the system.

FNS - Fiscal Notes System

System Requirements:
This application has been tested only in IE. Other browsers can produce unpredictable results.
After you have successfully logged in, the system will display the News screen. This screen provides a way for the LBB to communicate important information to all of the agencies.

The Legislative Budget Board will be having an open house/training for agency fiscal note coordinators on Tuesday, December 7 from 9:30 – 11:00 at the Robert E. Johnson building conference center, 1501 N. Congress.

This will be an opportunity to meet the LBB Fiscal Note Coordinators that you will be working with this session. We will discuss the fiscal note process for session and have training on the fiscal note system. The format for the agency fiscal note system has changed but the overall concept is the same as previous sessions. Everyone is welcome, but request that you try to limit the number of people from your agencies. For those of you who can’t attend, are from out-of-town, or are from smaller agencies/colleges that may only receive a few fiscal note requests per session, we will have a training presentation on our website, http://www.lbb.state.tx.us.

Also an Agency Fiscal Note Instructions Manual detailing the fiscal note system will
Agency Bills

- This screen allows you to see a list of bills assigned to your agency. The top portion of the screen is divided into two areas - a filter section and direct bill section. The filter section allows you to narrow down the results based on the criteria that you select. The direct bill section will pull up a bill based on the bill number that you type in. You can also collapse the filter section so you can have more room on the screen.
How to Select a Bill and Enter Data

To select a bill, move your mouse to the appropriate bill. The row should turn a light gray. Double-click anywhere in the row to display your cost estimate for the bill.
Fiscal Note Cost Estimate

- The fiscal note screen is divided into three sections - bill information, fiscal note format, and the fiscal note. The bill information and the fiscal note format sections are collapsible to allow you more room to work on the fiscal note.
Bill text below:

81R1923 SMH-D

By: Villarreal

A BILL TO BE ENTITLED
AN ACT

relating to ad valorem taxation.

BE IT ENACTED BY THE LEGISLATURE OF THE STATE OF TEXAS:

ARTICLE 1. STATE ADMINISTRATION OF PROPERTY TAX SYSTEM

SECTION 1.01. Chapter 5, Tax Code, is amended by adding

Sections 5.01 and 5.02 to read as follows:

Sec. 5.01. Office of Property Appraisal. (a) The Office of
Property Appraisal is established as an office in the comptroller's
office.

(b) The office is under the direction and control of the
comptroller.

(c) Unless the context indicates otherwise, a reference in
another law or an administrative rule to the comptroller in
connection with state administration of the property tax system
means the Office of Property Appraisal.

Sec. 5.02. Office of Property Tax Public Counsel. (a) The
LBB Coordinator Contact Info

- Each Fiscal Note will have a LBB Coordinator and LBB Analyst listed with their contact information. If you click on their names, it will open up a new message in your default email system.

<table>
<thead>
<tr>
<th>LBB Coordinator:</th>
<th>Melissa Nelson, Contact#: 463-1200</th>
</tr>
</thead>
<tbody>
<tr>
<td>LBB Analyst:</td>
<td>Jack Mason, Contact#: 936-4074</td>
</tr>
</tbody>
</table>
Fiscal Notes Format Section

- Agency Analyst field is an optional field that should provide the contact information for the person at the agency if questions arise about the content of the cost estimate.

- There are three different formats you can choose: Paste In, NFI, Worksheets.

  - Paste In is the default. If you have your own internal application or if you have the fiscal note in Word or Excel, you can copy from that program and paste into the paste in section.
  
  - NFI stands for No Fiscal Impact. If the bill will have No Fiscal Impact for your agency, you can select that option and it creates the fiscal note with the standard statement included.
  
  - If there is a fiscal impact but you don’t have a fiscal note created in another application, you can select the worksheet option. This option will allow you to fill out the projected fiscal impact.
When you select the Paste In option, you must click the Save button to be able to access the section to enter the fiscal note.

Next, you will need to go into the fiscal note that you already created (either internal application, word, excel, etc.) and select the pertinent material and select the copy option.

Then switch over to the browser, click in the white space and click the paste button. After that, you must click the Save Cost Estimate button.
Before you can click the Submit to LBB button, you must click the Print Preview button.

When you click Print Preview, you will see the Agency Fiscal Note Cost Estimate statement. Click the Return button.

Now you can click the Submit to LBB button.
To load the No Fiscal Impact standard statements, you need to select NFI and then click the Save button.

There are two sections to the NFI fiscal note: State Government Details and the Local Government Impact Details. Click on the heading to expand each section.
NFI (con’t)

- If you don’t have any changes, you can click the Submit to LBB button.

- If you do have changes, click in the text area and make your changes. (See picture below.)
- If you want to replace your comments with the standard statement, click the Replace State Gov. Comments with Standard Statement button. (See picture below.)
- Be sure to click the Save State Government Details after you have made your changes. (See picture below.)
NFI (con’t)

- Click the Local Government Impact Details link to Expand the section.
- If you do have changes, click in the text area and make your changes. (See picture below.)
- If you want to replace your comments with the standard statement, click the Replace Local Gov. Comments with Standard Statement button. (See picture below.)
- Be sure to click the Save Local Government Impact Details after you have made your changes. (See picture below.)

<table>
<thead>
<tr>
<th>State Government Details</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Local Government Impact Details</strong></td>
</tr>
<tr>
<td><strong>Print Local Government Impact on New Page:</strong></td>
</tr>
<tr>
<td><strong>Standard Statements:</strong></td>
</tr>
<tr>
<td>No fiscal implication to units of local government is anticipated.</td>
</tr>
<tr>
<td><strong>Local Government Impact Comments:</strong></td>
</tr>
<tr>
<td>No fiscal implication to units of local government is anticipated.</td>
</tr>
<tr>
<td><strong>Click here to type your changes.</strong></td>
</tr>
</tbody>
</table>
NFI (con’t)

- When you are done making changes, you can click the Print Preview button to view the fiscal note or you can click the Submit to LBB button to submit the fiscal note to the LBB.
If you select the Worksheet option, you have the ability to pick your starting year and the number of years you will forecast the fiscal impact. It is required to forecast at least 5 years from the initial start of impact (ie: 2012-2016), unless impact begins in the current year, in which case the cost estimate should include the current fiscal year plus five years (ie: 2011-2016).

Be sure to click the Save Button to pull up the worksheet section.
The Worksheet section is divided into tabs. The first tab is the Section Comments.

- Click on the heading to expand each section.
Worksheets – Section Comments (con’t)

- To add/change comments, click the Edit Comments button. The program will display a pop-up that allows you to add/change comments.

- Type or paste in your comments and click the Save & Return button to get back to the fiscal note worksheet.

- If you check or uncheck the Print on New Page option, you will need to click on the Save button.
Worksheets – Projected Technology Cost

- Enter the Technology costs for the bill. The system will round the amount to the nearest dollar. If you have a negative number, you can either enter it with a dash or inside parenthesis.

![Projected Technology Cost Table]

- After entering the data, click the Save button. The program will round the numbers and format them appropriately. If there are no errors, the message “Data saved successfully.” will display next to the Save button.

![Demo of projected cost table with numbers filled in and Save button highlighted]
Worksheets – Fiscal Implications

- This tab will allow you to estimate the possible gains/losses/savings/costs of the bill.
- The loss and cost rows will automatically format the numbers as negatives.
- Enter the fiscal implications amount. The system will round the amount to the nearest dollar. If you have a negative number, you can either enter it with a dash or inside parenthesis. When you click the save button, the dollars will automatically be formatted.

<table>
<thead>
<tr>
<th>Summary of Fiscal Implications</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>1 - Probable Gain to General Revenue Fund</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>1 - Probable Loss to General Revenue Fund</td>
</tr>
<tr>
<td>1 - Probable Savings to General Revenue Fund</td>
</tr>
<tr>
<td>1 - Probable Cost to General Revenue Fund</td>
</tr>
</tbody>
</table>

**Fiscal Implications**

**Impact To Fund:**

Probable Gain to

**Fund Description:**

2 - Available School Fund

Add
Worksheets – Fiscal Implications (con’t)

- You have the ability to add funds as needed. First you need to select the Impact to Fund option:

- Then you need to pick a fund description:
Worksheets – Fiscal Implications (con’t)

- If the fund description isn’t listed, you have the ability to add your own. Click on the Fund Description drop down and scroll to the bottom. You’ll see options for NEW.

- FYI: You can also press ctrl-end to get to the end of the list of fund descriptions.

- By Selecting one of the NEW fund descriptions, a text box will appear and you can add your new fund description. Click in the text box and enter your fund description and then click Add.
Worksheets – Fiscal Implications (con’t)

- You can add more than one fiscal implications to the list. You can add all the fiscal implications you want and then enter the amounts.
- If you add a fiscal implication, then type in the data into the years for that fiscal implication, you must save prior to adding another fiscal implication.
- You have the ability to sort the rows that you added or to delete the rows that you added. The General Revenue Fund rows will always be at the top and they cannot be sorted or deleted.
  - Clicking the up arrow will move the row up one.
  - Clicking the down arrow will move the row down one.
  - Clicking the red x will delete a row.

<table>
<thead>
<tr>
<th>Description</th>
<th>Years</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW-OTHER - Probable Savings to Demo add</td>
<td>0</td>
</tr>
<tr>
<td>108 - Probable Cost to 108 - Priv Beauty Culture Sch</td>
<td></td>
</tr>
<tr>
<td>79 - Probable Gain to 79 - Water Well Drillers Acct</td>
<td></td>
</tr>
<tr>
<td>102 - Probable Gain to 102 - Air Control Board Acct</td>
<td></td>
</tr>
</tbody>
</table>

- When you are finished estimating the fiscal implications, click the Save button. You should see the “Data saved successfully” message.
Enter the FTEs for the bill. You are allowed one decimal position and the system will not round if you enter in more decimal positions. If you have a negative number, you can either enter it with a dash or inside parenthesis.

After entering the data, click the Save button. The program will format them appropriately. If there are no errors, the message “Data saved successfully.” will display next to the Save button.
Worksheets – Personnel Services

- To enter Personnel Services, first you must select the position title from the drop down list at the bottom of the tab.

- If you need to change the salary group or the position title, you can click in the appropriate text boxes and type in the new salary group or new position title.

- Click the add button to add in the estimated costs for the position.
Worksheets – Personnel Services (con’t)

- The first column allows you to enter the number of FTEs for that position. You are allowed one decimal position and the system will not round if you enter in more decimal positions. If you have a negative number, you can either enter it with a dash or inside parenthesis.

- The remaining columns allow you to enter the costs for the FTEs. The system will round the amount to the nearest dollar. If you have a negative number, you can either enter it with a dash or inside parenthesis.

- **PLEASE NOTE** - If you enter a position and then you enter in data for that position, you must click the Save button if you want to add another position to the list. As an alternative, you can add all positions and then enter data.

- You have the ability to sort the rows that you added or to delete the rows that you added.
  - Clicking the up arrow will move the row up one.
  - Clicking the down arrow will move the row down one.
  - Clicking the red x will delete a row.

- When you are finished, click the Save button. The program will round the numbers and format them appropriately. If there are no errors, the message “Data saved successfully.” will display next to the Save button.
Worksheets – Other Expenses

- This tab will allow you to estimate the fiscal impact for each method of financing affected by this bill. The system will round the amount to the nearest dollar. If you have a negative number, you can either enter it with a dash or inside parenthesis.
- If you have other costs that are not listed, click the Insert to Specify Other Costs button. You must enter data for the other cost that you added or the system will not save the information.
- You have the ability to delete costs that you have added by click on the red x.

When you are finished, click the Save button. The program will round the numbers and format them appropriately. If there are no errors, the message “Data saved successfully.” will display next to the Save button.
Worksheet – Method of Financing

- This tab will allow you to estimate the methods of financing this bill.
- The system will round the amount to the nearest dollar. If you have a negative number, you can either enter it with a dash or inside parenthesis. When you click the save button, the dollars will automatically be formatted.

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1 - General Revenue Fund</td>
<td>$1,000</td>
<td>-1000</td>
<td>(1000)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>555 - Federal Funds</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total</td>
<td>$1,000</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

Method of Financing:
1 - General Revenue Fund

Data saved successfully.

Save
You have the ability to add other Methods of Financing. Click the drop down arrow on the Method of Financing field and select your option. Then click the Add button.
If your method of financing isn’t in the list, you can add one of your own. Click the drop down arrow on the Method of Financing field, scroll all the way to the bottom and select one of the new options.

FYI: You can also press ctrl-end to get to the end of the list of fund descriptions.

A text box will appear to the left of the Add button, type in your method name and click the Add button.
Worksheet – Method of Financing (con’t)

You have the ability to sort the rows that you added or to delete the rows that you added. The General Revenue Fund and the Federal Fund rows will always be at the top and they cannot be sorted or deleted.

- Clicking the up arrow will move the row up one.
- Clicking the down arrow will move the row down one.
- Clicking the red x will delete a row.

When you are finished estimating the fiscal implications, click the Save button. Unless there are errors, you will see the “Data saved successfully” message.
Submitting Worksheet to LBB

- The Submit to LBB button is disabled until the following occurs:
  1. Data is entered into all text fields.
  2. Data is entered into at least one table, if worksheet format is selected.
  3. Cost estimate is previewed to for final review before submission by clicking the Print Preview button.

- When you click the Print Preview button, you will see a preview of your worksheet.

- When you click the Return button, you will be taken back to the data entry tabs. Now you can click the Submit to LBB button.
LBB Completed Bills

- This screen allows you to see a list of completed bills for your agency. The top portion of the screen is divided into two areas - a filter section and direct bill section. The filter section allows you to narrow down the results based on the criteria that you select. The direct bill section will pull up a bill based on the bill number that you type in. You can also collapse the filter section so you can have more room on the screen.
LBB Completed Bills (con’t)

- To select a bill, move your mouse to the appropriate bill. The row should turn a light gray. Double-click anywhere in the row and the fiscal note should display. Click the Return to Summary link to return back to the completed bill list.
My Filter Defaults

My Filter Defaults is a feature that was added to help manage the bill list screens. To access this feature, click the My Filter Defaults tab. Choose your defaults for each filter type and click the Save My Filter Defaults button.
For more information on the Fiscal Notes application, hover your mouse over the Help tab, and select User Manual. The fiscal notes manual will open in a new browser window.
Contact Us

- Click the contact us tab to display a pop-up box of contact information.
  - If you want immediate 24-7 assistance, call the FNS Help Desk number.
  - If you want assistance within the next business day, click the LBB Applications link.
THE END