

# SUBMIT AND REVIEW A NON-SUBSTANTIVE CHANGE REQUEST

## Purpose

A non-substantive change to a previously approved Controlling Board request requires the approval of the President of the Controlling Board. The requesting agency can now complete the request for change using the e-CB application.

Non-substantive changes include the following:

- The term or fiscal year for which the contract is approved. The term or fiscal year change must be within the current biennium.
- The contract amount allocated to each fiscal year of the biennium.
- The appropriation line item number or name or fund identified in the request.
- The subcontractor(s) identified in the contract.
- Any other change which the President identifies as a non-substantive

## Submitting a Non-Substantive Change Request

Anyone with e-CB access can create and submit a non-substantive change request to the Controlling Board president.



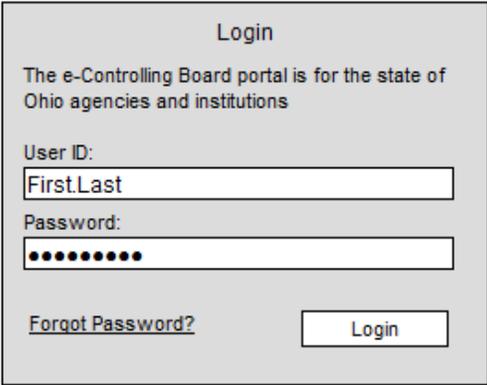
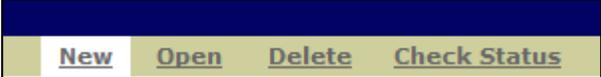
Navigation: <https://ecb.ohio.gov/Public/Default.aspx>

The screenshot shows the Ohio e-Controlling Board website. At the top, there is a navigation bar with links for Home, Budget and Management, About the Board, Meetings & Agendas, and Glossary. Below this is a "Welcome to the State of Ohio e-Controlling Board" message. The main content area is divided into several sections:

- Login:** A section for logging in with fields for User ID and Password, and a "Login" button.
- Meeting Schedule:** A calendar for March 2011 showing dates from 27 to 31. A legend indicates "Today" and "Meeting Date".
- Meetings and Agendas:** A section listing agendas for 03/28/2011 and 03/14/2011, along with minutes for 03/29/2011 and 03/14/2011.
- Important Information:** A section listing various meetings and agendas, including the January 31, 2011 Meeting Schedule and information about OBM ITO Help Desk.
- Controlling Board Members:** A section listing the members of the 129th General Assembly, including Sen. Chris Widener, Sen. Shannon Jones, Sen. Tom Sawyer, Rep. Ron Amstutz, Rep. Jay Hottinger, Rep. Clayton Luckie, and their respective aides.
- Search:** A search box with a "Search" button and a "Description:" field.

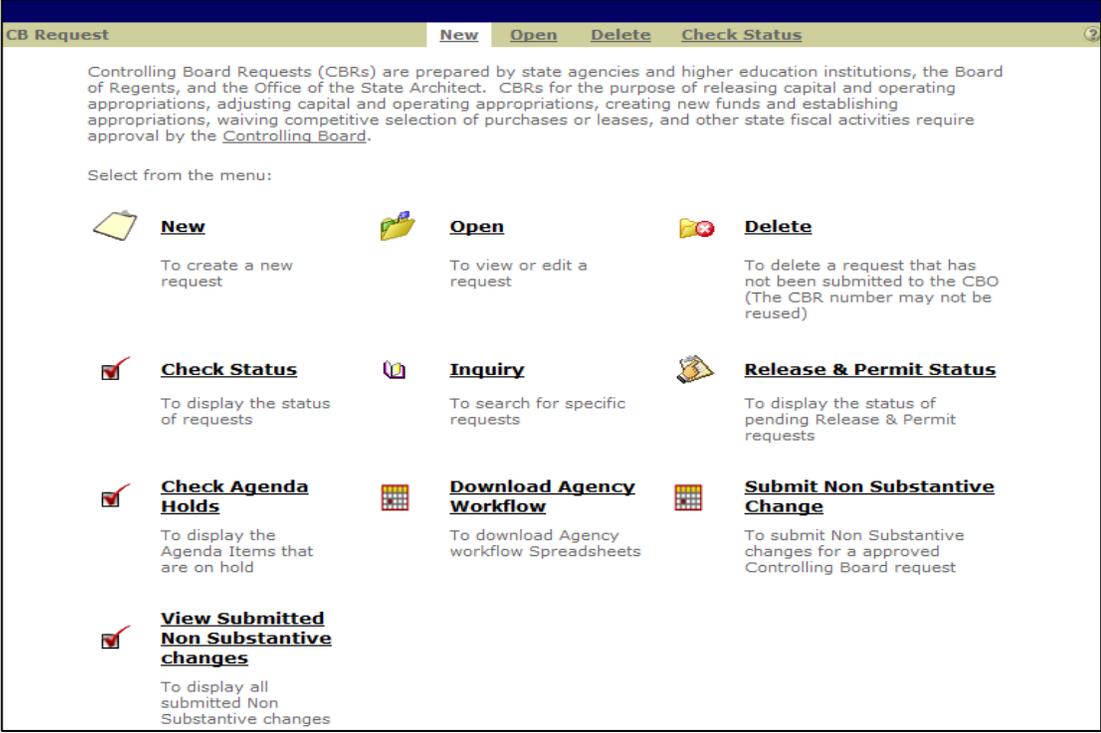
At the bottom of the page, there is a footer with the Ohio.gov logo, contact information for the Controlling Board, and a note about technical support.

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Step-by-Step	Screen
<ol style="list-style-type: none"> <li>1. Enter your e-CB <b>User ID</b> and <b>Password</b></li> <li>2. Press <b>Login</b></li> </ol>	
<ol style="list-style-type: none"> <li>3. Click on the <b>CB Request</b> icon at the top of the page</li> </ol>	
<ol style="list-style-type: none"> <li>4. Click the <b>New</b> tab</li> </ol>	

The CB Request page will appear

You can **Submit a Non-Substantive Change** or **View Submitted Non-Substantive Changes**



**CB Request**    [New](#)   [Open](#)   [Delete](#)   [Check Status](#)

Controlling Board Requests (CBRs) are prepared by state agencies and higher education institutions, the Board of Regents, and the Office of the State Architect. CBRs for the purpose of releasing capital and operating appropriations, adjusting capital and operating appropriations, creating new funds and establishing appropriations, waiving competitive selection of purchases or leases, and other state fiscal activities require approval by the [Controlling Board](#).

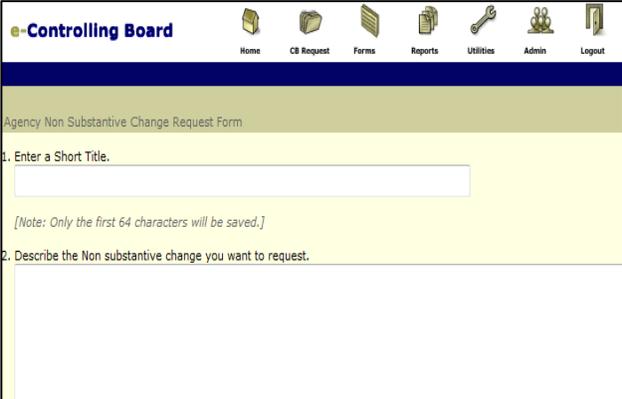
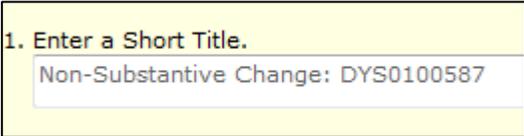
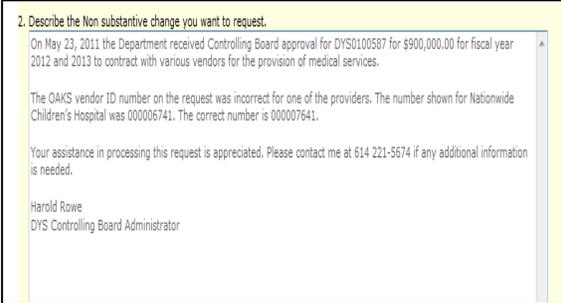
Select from the menu:

-  **New**  
To create a new request
-  **Open**  
To view or edit a request
-  **Delete**  
To delete a request that has not been submitted to the CBO (The CBR number may not be reused)
-  **Check Status**  
To display the status of requests
-  **Inquiry**  
To search for specific requests
-  **Release & Permit Status**  
To display the status of pending Release & Permit requests
-  **Check Agenda Holds**  
To display the Agenda Items that are on hold
-  **Download Agency Workflow**  
To download Agency workflow Spreadsheets
-  **Submit Non Substantive Change**  
To submit Non Substantive changes for a approved Controlling Board request
-  **View Submitted Non Substantive changes**  
To display all submitted Non Substantive changes

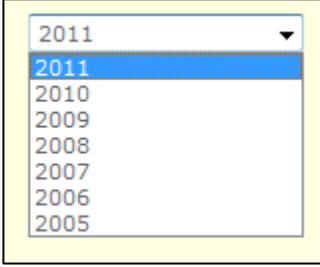
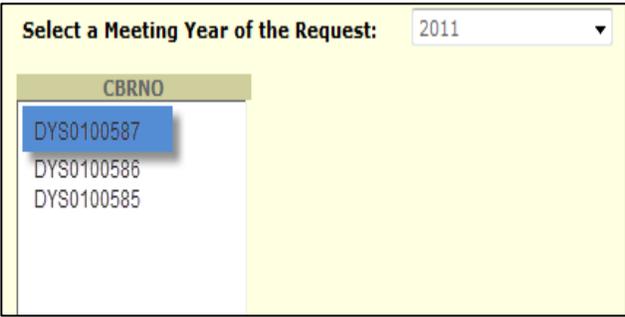
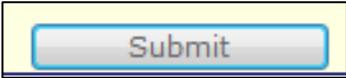
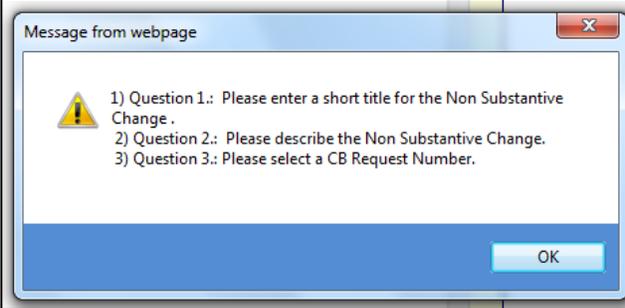
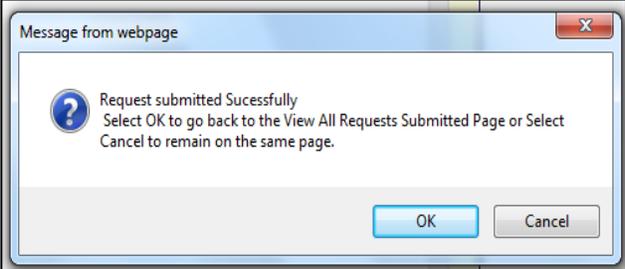
# SUBMIT AND REVIEW A NON-SUBSTANTIVE CHANGE REQUEST



**Activity:** Create a request for a non-substantive change to an approved Controlling Board request.

<p>5. Click the <b>Submit Non-Substantive Change</b> link</p>	
<p>The form will appear but cannot be downloaded</p>	
<p>6. Enter a <b>Short Title</b> (up to 64 characters) for the change request</p> <p> Include the approved/original Controlling Board number in the title</p> <p> <b>Note</b> To find the request number, view the list that appears after selecting the Meeting Year of the Request</p>	
<p>7. Enter a description (up to 8000 characters) of the non-substantive change you want to request</p> <p> Include detailed information about what needs to be changed along with your name and contact information</p>	

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<p>8. Select the calendar year of the Controlling Board meeting when the original request was approved</p>	
<p>9. Select the approved/original Controlling Board number</p>	
<p>10. Click the <b>Submit</b> button located at the bottom of the page</p>	
<p> <b>Note</b> An error message will appear if any required field was not completed (title, description, original request number)</p> <p> Click the <b>OK</b> button to go back and complete the request</p>	
<p> <b>Note</b> Once all fields are completed, a message will appear stating your request was submitted successfully</p> <p>11. Click the <b>OK</b> button to view the All Requests Submitted Page</p> <p> <b>Note</b> Non-substantive change requests cannot be deleted or edited once submitted. If there is an error, submit another request.</p>	

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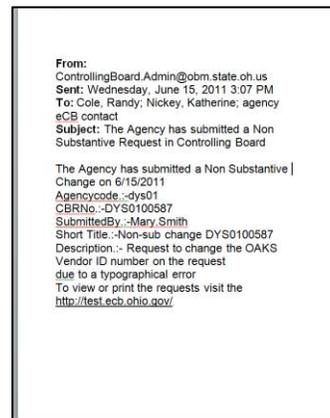


Once the request for a non-substantive change has been submitted, the original status will show as *Pending*. Once reviewed by the Controlling Board President, the status will change to *Approved* or *Denied*.

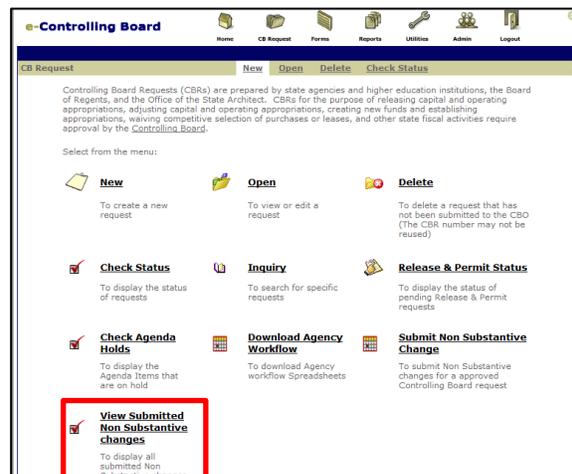
CBR No	Short Title	Submitted By	Submitted Date	Approved/Denied By	Approved/Denied Date	Agency Code	Status
DYS010	Non-sub Change DYS010	Mary.Smith	6/15/2011			DYS01	Pending



The Controlling Board President, Controlling Board Secretary, and submitting agency e-CB contact will receive an automatic email stating that a request for non-substantive change was submitted. It includes the Controlling Board number, the title and description of the change, and who submitted the change request



12. The status of the submitted non-substantive change request can be viewed anytime from the CB Request page by clicking on **View Submitted Non Substantive changes**



# SUBMIT AND REVIEW A NON-SUBSTANTIVE CHANGE REQUEST



Once the Controlling Board President approves and signs the request for change, a copy is sent to State Accounting for adjustments to be made in OAKS

**Financials**

[OAKS Status Click Here](#)

**Sign in Now**

OAKS is a State of Ohio computer system, which may be accessed and used only for official state business by authorized personnel. Unauthorized access or use of the computer system may subject violators to criminal, civil, and/or administrative action.

User ID:

Password:

[Sign In](#)

**State Travelers:**  
Due to the fiscal year-end process, the Travel and Expense module will not be available beginning at 7:30 p.m. June 15, 2011, through June 30, 2011. For more information, visit [www.ohio.gov/procurement/ohio.gov](http://www.ohio.gov/procurement/ohio.gov)

[Forgot your password?](#)  
For help signing into FBI and related information, [click here](#)

**Welcome to OAKS Financials**

The Ohio Administrative Knowledge System (OAKS) Financials (FBI) is used by State of Ohio employees to manage Purchasing, General Ledger, Accounts Receivable, Accounts Payable, Procurement, EPM for FBI Expense and CAS Data Warehouse modules. Additional modules including Capital Improvements, Contracts and Projects (based for Grants Management, Asset Management, Budgets and EPM for FBI) will be added in upcoming implementations.

If you need assistance or have forgotten your OAKS password, please contact the OAKS Help Desk:  
E-mail: [oaas\\_helpdesk@oaks.state.oh.us](mailto:oaas_helpdesk@oaks.state.oh.us)  
Phone: 614-644-6625 or 1-888-OhioOAKS (1-888-644-6625)

**Hours of the support:**

Non-payday weeks	7 am - 5 pm Mon - Fri Unavailable Sat Sun
Payday weeks	7 am - 5 pm Mon - Fri Unavailable Sat Sun

If you would like to email the OAKS Help Desk after normal business hours an OAKS staff member will respond to your inquiry the following business day.

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Ohio.gov



The process outlined in this job aid is for a non-substantive change to a previously approved Controlling Board request. A substantive change requires the preparation and submission of a new request to the Controlling Board for review and approval.

For more information about non-substantive and substantive changes to approved Controlling Board requests, review the Controlling Board Manual available by clicking the Manuals link from the Forms page in the e-CB application.