



# Office of Budget and Management

John R. Kasich  
Governor

Timothy S. Keen  
Director

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To: eControlling Board Users

From: Controlling Board

Date: June 30, 2017

Re: eControlling Board (ECB) Portal Enhancements

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The purpose of this memorandum is to provide ECB users with updates regarding the new enhancements to the ECB portal. These enhancements to the portal are processes that are currently required within the Controlling Board Manual but will now be enforced within the portal. These are requirements that must be completed at the agency “preparer” level before routing to the agency “approval” level. Beginning July 1, 2017, the following changes within the portal will go into effect:

1. For all Capital and Operating requests seeking a Waiver of Competitive Selection or an Agency Release Competitive Opportunity, the required questions that pertain to the agency’s request must be completed for each vendor before the request is routed to an agency approver for review and submitted to the Controlling Board.
  - This also applies to all requests for Waiver of Competitive Selection or an Agency Release Competitive Opportunity for State Term Schedule (STS) Contracts.
  - For agencies (i.e: AGO & DAS) that come for blanket waivers for contract authority for several vendors at once; to bypass the required questions; in the “Attachments” section, select “Waiver (Blanket)” from the “Attachment Type” drop down list when attaching the supporting document. This will allow you to route the request without the required questions. *(Note: this applies only to those blankets AGO waivers for special counsel and DAS biennium waivers for IT contracts (STS)).*
2. For all Operating Transfer requests seeking to transfer cash and/or appropriation between Funds/ALI(s), the required questions that pertain to transfers must be completed before the request is routed to an agency approver for review and submitted to the Controlling Board.
3. For all Fund/Appropriation requests to increase appropriation authority, create a new fund and/or establish appropriation authority, the required questions that pertain to that request must be completed before the request is routed to an agency approver for review and submitted to the Controlling Board.

4. For all requests utilizing capital appropriations, the Project Budget must be completed before the request is routed to an agency approver for review and submitted to the Controlling Board. *(You may attach a budget file provided that the required information is included within the budget. You are encouraged to attached the budge file on the "Project Budget" page and not the "Attachment" page to allow you to submit your request.)*
5. All attachments must be converted to a PDF document before attaching it to your request. *(The system will no longer accept Word or Excel documents)*

**Please note that as the preparer of a request, the system will not allow you to route your request to an approval until you have completed these steps. If you have any questions, please contact Teresa Goodridge, Controlling Board Executive Secretary at 614-466-57251 or [Teresa.Goodridge@obm.ohio.gov](mailto:Teresa.Goodridge@obm.ohio.gov) .**