

CB-5 Instructions – LF Forms

Link to form: <https://it-lf-ecmf.tamu.edu/Forms/cb5>

Note Form will need to be completed at one time, currently no option to save & submit later*

Home Tab

Indicate whether this is a revised CB-5 or an original

- A revised CB-5 is ONLY necessary if there are changes in salary and/or operating totals effective AFTER the fiscal year start date
- If completing a revised CB-5, indicate the effective date of the revision

Fill in the County Name, Fiscal Year Date Range, and County Pay Schedule (all other data will auto-populate)

Extension Agent Personnel Tab

On this tab, provide payroll information for each County Extension Agent paid by the County, including any vacant positions (if vacant, list “Vacant”)

- Include each County Extension Agent’s position, longevity, base salary, and travel, as applicable
- Utilize the “Add” button for additional County Extension Agent
- Subtotals and Grand Totals will auto-sum
- If a County Extension Agent’s salary increased/decreased over \$2,400 since the previous year, **please add an explanation in the text box provided.** You can also upload any support documents.

Staff Personnel Tab

On this tab, provide payroll information for each County Support Staff Personnel (i.e. Secretary, Office Managers, Program Assistants, including any vacant positions (if vacant, list “Vacant”))

- Include each County Support Staff personnel’s position, longevity, base salary, and travel, as applicable
- Utilize the “Add” button for additional County Staff Personnel
- Subtotals and Grand Totals will auto-sum

Fringe Benefits Tab

On this tab, provide the lump sum amount for all fringe benefits for all County Extension Agents and County Support Staff

Operating Expenses Tab

On this tab, provide the following lump sum amounts:

- Capital Outlay (any equipment purchases over \$5,000)
- All Other Operating Expenses (see examples provided within the form)
- Supplemental Information Upload (may include approved county budget, budget detail, etc.)
- Grand Total for Operating Expenses will auto-sum

Sign & Submit Tab

To finalize the form, provide the following:

- Sign and print the County Official’s name, title, phone number, email address
- Provide your County Extension Coordinator point of contact email address
- Supplemental Information Upload (provide any supplemental documentation applicable)
- Grand Total for County Budget will auto-sum all tabs and appears at the top of this tab

Click Submit to complete the form. Upon submission, a confirmation page will appear, and you have the option to Download, Print, or Email the form to additional contacts. (***Note* County Official and County Extension Coordinator listed above will automatically receive an emailed copy of the completed form***)