

BRIEF INSTRUCTIONS
AGENCIES WITH NO PROPOSED CAPITAL PROJECTS*
AND WHOSE PLANS ARE SUBMITTED DIRECTLY TO CPAB

Only the designated Agency Contact can do shaded items (#5 and #9).

1. Go to Capital Planning Advisory Board (CPAB) web page
www.lrc.state.ky.gov/statcomm/CPAB/homepage.htm
 2. Click on [Capital Planning System](#)
 3. Under “Account Login” type your e-mail address and password, and click on [Login]
 4. On the SELECT PLAN page, click on [Select] to the left of Plan 2020-2026, Version 1
 5. Respond to all questions on the Plan Checklist and click on [Save Changes]
Only the individual reported to the CPAB as the Agency Contact can access the Checklist. After the Checklist is completed, this step will be skipped for all agency users.
 6. From the SELECT OPTION page, [Select] and complete each form listed under Forms-Background, Forms-Plan, and Forms-Ancillary Records
The forms listed here will be based on responses provided on the Checklist. They are the only forms the agency is to complete.
 7. From the SELECT OPTION page, under Agency Level Reports, [Select] “View/Print Forms” to review and/or print reports for the forms that have been completed
This function is for the agency’s convenience only. Hard copies are *not* to be sent to CPAB.
 8. From the SELECT OPTION page, under Agency Level Reports, [Select] “View/Print Validation Reports.” Then choose [View/Print] to see the data validation report for each form listed
The report will identify missing or otherwise problem data (“Validation Errors”) in the form as currently completed. The system will not accept the plan for transmittal to CPAB until all “Validation Errors” are corrected.
 9. From the SELECT OPTION page, under Submit Plan, [Select] “Submit Plan to CPAB”
After ensuring that all of the required validations have been completed, the system will notify CPAB that the agency’s plan has been transmitted electronically and prompt the user to print a hard copy “Transmittal Notification.”
- (At this point, the agency’s plan will be “read-only.” Changes cannot be made until the agency has been notified that the initial review by CPAB staff has been completed.)*
10. Forward (via email, messenger, or USPS) the signed “Transmittal Notification” to the CPAB office

*Capital Projects are items that meet any of the following criteria:

- Capital construction with an estimated cost of \$1,000,000 or more
- Equipment items with an estimated cost of \$200,000 or more (postsecondary education scientific or research equipment is to be submitted for first biennium only)
- Information technology systems with an estimated cost of \$1,000,000 or more
- State-administered grant/loan program included in the capital budget that provides financial assistance to non-state agencies or entities
- Court facility where the annual use allowance for new or renovated space is \$200,000 or more