

## Agency Instructions

### Responding to Restricted Appropriations or Report Requests

The *Joint Chairmen's Report* (JCR) lists each action adopted by the General Assembly in the budget bill, including reductions and budget bill language, with explanations. Budget language may, among other things, restrict funding pending the submission of a report or other action. The JCR also includes committee narrative adopted by the budget committees, which is generally used to request reports or additional information.

**Restricted Appropriations:** Where all or a portion of an appropriation is restricted, approval to release restricted funds should be requested in a letter addressed to the budget committee chairs and attached to an email to jcr.docs email address. The correspondence for a request should identify the agency, the amount restricted, the fund source, and should specifically note that the release of restricted funds is being requested. See "Submission Procedures" below for specific direction for all items.

**Due Dates for Reports:** Please note that some restricted items as well as reports requested via committee narrative have a specific due date. If a due date cannot be met and the agency wishes to request an extension, the agency should prepare a letter to the committee chairs and send as an attachment via email to the jcr.docs email address. The correspondence should indicate why an extension is needed and the anticipated submission date. See "Submission Procedures" below for specific instructions.

**Submission Procedures:** All correspondence, agency reports, and studies submitted in response to committee narrative or budget bill language are required to be submitted both in electronic form and hard copy:

- **Electronic copies and requests for extension should be sent via email to [jcr.docs@mga.maryland.gov](mailto:jcr.docs@mga.maryland.gov) with a cc to Sarah.Albert@mga.maryland.gov.** The naming convention for each item should include the session year of the JCR, the page in the JCR on which the item's Information Request appears, an agency abbreviation, and the title of the report (*e.g.*, 2024\_p101\_MDH\_Staffing and Salary Update). **The subject line should include the SESSION YEAR and page number in the JCR on which the item's information request appears and reflect if it is an Extension Request.** DLS will distribute electronic copies to the Office of Policy Analysis staff, including the agency's DLS budget analyst, as well as the members of the budget committees. Electronic documents should be converted to PDF form rather than scanned. If an excel spread sheet is used to satisfy a reporting requirement, submit **BOTH** the spread sheet and the PDF from which the five required copies will be printed, attached to the original email. **NOTE: If files to be emailed are larger than 10 MB, they cannot be sent via email. Contact [jcr.docs@mlis.state.md.us](mailto:jcr.docs@mlis.state.md.us) for instructions for posting large files on the DLS FTP site.**
- **Mail five hard copies of correspondence and reports to the legislative library. Please address the packet to:**

Sarah Albert, Mandated Reports Specialist  
DLS Library and Information Services  
90 State Circle, Room G117  
Annapolis, MD 21401-1991

JCR All:

- documents should be converted to PDF form rather than scanned.
- documents should have a title page with subject matter title, (optional JCR year page # citation), author and date.
- **please refrain from using non-subject matter statements in the title such as “Joint Chairmen’s Report”, or “Report to the Senate Budget and Taxation Committee...,” or “Report on...”. Please do not use the requirement/legislation or the law in titles.**
- **please do not use the “frequency” in the beginning of the tile i.e. “Annual/Quarterly/Final/Interim”, this should be a subtitle or at the end.**
- cover letters should be a separate PDF or fall behind the title page.
- submission emails should have the identification information i.e. “Session Year/Page #” at the beginning of subject line.
- body of email should contain print copy notification
- submit BOTH the spread sheet and the PDF from which the 5 required copies will be printed, both should be attached to the original email.
- submission emails should have a print copies notation in the body of the email.
- submission emails are official correspondence.
- submission emails should be printed and sent with the 5 print copies
- envelopes/packages/boxes should have Session year/page # on the outside, under the return address.