

Hurricane Helene Immediate Needs Budget Request Instructions

I. Introduction/Overview

On October 10th, the Governor signed the [Disaster Recovery Act of 2024](#), which invests \$273 million in the Hurricane Helene Disaster Recovery Fund to provide cash flow loans to state and local governments, match federal assistance, support school nutrition professionals, provide technical assistance to local governments, and ensure that affected North Carolinians can safely and securely vote in this year's election. To understand the full scale of Helene's impact on North Carolina, the Governor asked the Office of State Budget and Management (OSBM) to quickly compile a comprehensive damage and needs assessment.

The NC General Assembly is scheduled to reconvene on October 24th to address further disaster related needs. OSBM alerted agencies in an [October 3rd memo](#) that the Office would collect disaster related budget requests. This document instructs agencies how to prepare budget requests for immediate needs, through June 30, 2025, that are directly tied to Helene and other recent disasters. These requests should be nonrecurring. **Requests for longer-term, recurring items should be included in the normal biennial budget and will follow the process already outlined on [OSBM's website](#).**

Timeline

By 5pm on Wednesday, October 16th:

1. Agencies submit final Worksheet-II-EZs (WSII-EZs) in IBIS.
2. Agencies email special provision language not already included in WSII-EZs to their OSBM budget development analyst.

II. How OSBM Evaluates Budget Requests

OSBM understands that agencies are working hard with limited resources to respond to these natural disasters and that available data may be limited or preliminary. As much as possible within these limitations, WSII-EZs should clearly describe the specific need being addressed, how the request addresses the need, the expected impact, the timeline to completion, and any anticipated challenges. OSBM and the Governor will prioritize urgent requests that make strides in helping the people and businesses in Helene-impacted areas recover.

III. Agency Submissions

1. Operational and Capital Requests – WSII-EZs

The Helene response budget process will not use the ABC list nor the JDF. Instead, each capital and operational request should be submitted through IBIS as a WSII-EZ according to the guide below.

2. Special Provisions – Summary Word Document

In some cases, agencies may need authority or accommodations not associated with a funding request. Each agency must assemble all special provisions language that they did not include in any WSII-EZs onto a single document. They must then email this document to their OSBM budget development analyst.

IV. Guide to Completing the WSII-EZ in IBIS

Note that IBIS is already set up for the FY 2025-27 budget cycle, so those years will show for each entry. Entries created and named according to these instructions are understood to occur in FY 2024-25.

SELECT THE REQUEST TYPE:

To begin a Change Budget entry, log in to IBIS, then:

1. Click "Create New Request" and select "Worksheet II".
2. Select "Increase EZ" from the Worksheet Type.
3. Select the "FY24-25 Disaster Recovery" type.

THE BASIC INFORMATION TAB:

- **Priority:** Enter "1" indicating highest priority as we are asking for your immediate budget needs through June 30, 2025.
- **Recurrence:** These requests should be nonrecurring.
- **Worksheet Type:** Select "Increase".
- **Request Type:** See above guidance on request type: "FY24-25 Disaster Recovery".
- **Title:** *Preface titles with "Helene", "TS Debby", "PTC-8", or "Drought"; e.g. "Helene: <<Request Name>>".* Include enough specificity to identify the request.
- **Capital Improvement Project:** Select "No". Note in the narrative section if this is a capital request.
- **Additional Space Requirements** per [G.S. 120-36.7\(c\)](#): Select "No".
- **IT Component Requirements:** Indicate if this request has an IT component. There is no IT Request Survey for Helene requests.
- **Affects Another State Agency or Local Government:** Indicate if this request impacts another state agency or local government. If "Yes" please list the agency/government.
- **Requires Special Provision:** If "Yes" describe the provision and statute or session law references.
- **Ties to Agency Strategic Plan:** This question is required in IBIS, but it will not be used to evaluate Helene response budget requests.

THE NARRATIVE TAB: Clearly and succinctly articulate the problem being addressed, how the request will solve the problem, and the expected impact. Any special provisions language associated with budget requests should be included in the narrative tab as well. **You will not be able to submit a WSII-EZ if each field has not been addressed.**

THE POSITIONS TAB: Please do not submit positions requests at this time. Requests for permanent positions should be made as part of the FY 2025-27 biennial budget process.

THE BUDGET DETAIL TAB:

The Budget Detail tab summarizes the total requirements, receipts, and appropriation for the request.

- **Requirements menu:** The Account Number and Title are the rolled-up NCFS expenditure Account Number and Account Title at the Account Group level of detail (e.g., 5XXX). Input the incremental change in funding required to implement the request in the **Year 2 field**.
- **Receipts menu:** The Account number and title are the rolled-up NCFS receipt Account Number and Account Title at the Account Group level of detail (e.g., 4XXX). Input amounts in the **Year 2 field** to reflect the anticipated incremental receipts increase to implement the expansion request.

Note: Agencies may complete as many lines as necessary for requirements and receipts. IBIS will compile these lines in the Budget Overview tab.

BUDGET OVERVIEW TAB: This tab summarizes all requirements, receipts, and appropriations entered in the Budget Detail tab.

ATTACHMENTS/REFERENCES: Attach any documents that support your expansion request.