

B.1 BEST PRACTICES FOR BUDGET SUBMISSION

To assist agencies with the completion of the FY 2023 Budget Submission, DBM has generated a list of best practices created in consultation with agencies and budget analysts that are applied by the most successful agencies during the budget submission process. Many of these best practices are strategies for using the BARS budget system. DBM encourages agencies to utilize the following guidelines during the lead-up to the FY 2023 Budget Submission, where applicable.

- Use the “Support” button in BARS and related user guides to diagnose issues with adjustments or processes in the system. If the problem persists:
 1. If there is an Application Error, contact the service desk (service.desk@maryland.gov).
 2. If there is a Chart of Accounts or Fund Source change needed, contact the DBM Budget Processing Team (dlbudgethelp_dbm@maryland.gov) copying your OBA analyst.
 3. If there is any other issue, contact your OBA analyst (and additional OBA staff, if instructed) as issues arise.
- Utilize validation error guides available in the “Support” tab in BARS to identify solutions for submitting adjustments and the Budget Request Submission module. Additional guides and summaries may be found in Section B.5.
- Manage the agency position complement actively throughout the year using Workday, if applicable. Agencies are strongly encouraged to have all location data (unit, program, and subprogram) as well as job classification and step information for filled and vacant positions updated in Workday.
- Use the “Copy Workday” function in BARS during the Position Reconciliation exercise to the extent that the information is well-maintained in Workday. This significantly reduces the amount of time required to manage each PIN individually in the system for the Budget Year, and eliminates the need to change the vacancy status for each position.
- Submit all changes to positions during the Position Reconciliation process such that no additional position-related adjustments are necessary during the FY 2023 budget submission.
- Use Ad-hoc to confirm adjustments as they are entered into the BARS budget system. Ad-hoc may be used
 1. before adjustments have been “Released” to identify areas where additional detail needs to be loaded, or
 2. to check items as they are being loaded into BARS to get a sense if those adjustments were loaded into BARS as intended.

In addition, a number of pre-formatted ad-hoc reports are available, including reports displaying Budget Year GF Target Tracking, 3 Year Expenditure, 3 Year Revenue, 3 Year Adjustment Tracking, and SD Tab related reports.

- Agencies are also encouraged to use Reports in BARS to observe what is currently “Released” or baseline in the system. Reports may be expanded to view detail from adjustments in mid-flight by selecting adjustments with the “In Review” or “Reviewed” status in Reports. The “Agency Adjustment Summary” provides agencies a list of all of their budget adjustment transactions for the last three budget years and provides these filters and groups in an intuitive tool.
- Emphasize reading Section I.1 “New and Reminders for FY 2023” and Section A.1 “Standard Rates and Calculations” to all staff responsible for the budget. These sections represent the most important information for agency fiscal staff where DBM rates or recommendations have changed year-over-year.
- Zero out comptroller subobject 0189 budgeted turnover in the FY 2021 Agency Actuals.
- Engage regional offices well in advance of the budget submission deadline during the spring and summer interim to determine needs. Agencies are encouraged to use the interim to set expectations of what should be requested through the budget and how the submission process should proceed.
- Engage staff in internal training after the finalization of the Governor’s Allowance to identify areas of deficiency for staff and/or offices that may require additional training or emphasis during the interim.
- Develop internal training for onboarding new or existing staff onto the BARS system. Agencies are encouraged to engage their budget analysts and the Office of Budget Analysis during the spring and summer to gain mastery with the BARS system, particularly in new budget requirements that were particular pain points during the prior year’s submission.
- Download the BARS grid formats from each of the data entry tabs in BARS to assist in the creation of new data for BARS. In agencies where there are field offices responsible for the update and submission of their own budget, DBM recommends downloading those budget grids for each individual office from BARS and distributing them for update and completion.
- Utilize pre-formatted Ad-hoc reports available for download from BARS to monitor the holistic budget preparation prior to final submission through the Budget Request Submission module.
- Export and save time-intensive grids from BARS as a backup. Create an internal file structure to save these exported grids as information is added and adjustments are made. If changes are required to data entered by the agency, it may be easier to update the exported Excel file and re-import the data than micromanage multiple lines in a BARS grid.
- Submit Over-the-Target and Deficiency requests alongside the budget request using the Budget Request Submission module. DBM will not accept additional requests outside of the system for the FY 2023 budget submission.

- Provide reliable data in the Fund Balance tab when finalizing the Budget Request Submission module. This will avoid extensive questions from DBM and DLS regarding fund balances, particularly for special funds.
- Export and save the completed Fund Balance tab in the Budget Request Submission module once it has been populated prior to submission. The Fund Balance tab in the final submission module is wiped each time new adjustments are added and refreshed for inclusion in the submission, and having a backup file from the export can save significant time and effort.
- Run the Budget Request Submission module early and often before the submission is complete, omitting the Workflow comment to ensure failed validation. This process can help identify wider issues with the budget submission or give the submitter a sense of the remaining detail required for the submission.
- Prepare for the most common Budget Request Submission module validation errors:
 1. Contractual FTEs are at least \$20k per 1.00 FTE
 2. Comptroller Subobject 0192 equals \$0 across the entire agency
 3. Target lock requirements must be met (these can be reviewed in the [Targets Tab](#))
 4. Reduction target totals are met via Reduction adjustments within the submission