

Utilizing the Contracts/Grants SD Tab

Introduction

The Contracts/Grants SD Tab is a required supporting detail tab for any changes to Object 08 or Object 12 data within an agency, including adjustments to existing contracts/grants data released within the BARS system.

Step 1:

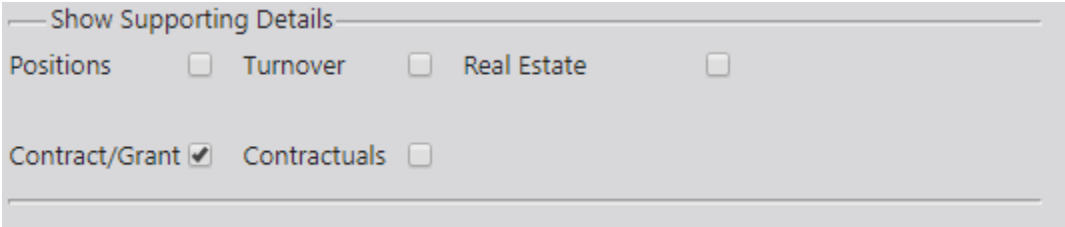
Log into BARS Production

Step 2:

From the **BARS** Homepage/Worktray, hover over **Operating Budget** at the top of the page and select **Adjustments > Agency / OBA Adjustments**.

Step 3:

Complete Overview Tab and select the **Contract/Grant** button in the “Show Supporting Details” box at the bottom of the tab. This will bring up the hidden Contract/Grant SD Tab in the row of tabs at the top of the page.



Show Supporting Details	
Positions	<input type="checkbox"/>
Turnover	<input type="checkbox"/>
Real Estate	<input type="checkbox"/>
Contract/Grant	<input checked="" type="checkbox"/>
Contractuals	<input type="checkbox"/>

Any Over the Target Requests, Deficiency Requests, and Agency Reduction Options adjustments entered by agency users are required to include detail in the Narrative Tab, which includes detail on the **Impact** and **Justification** for the given adjustment.

Step 4:

In the Contract/Grant SD Tab—

Confirm the information brought over from the Overview Tab is correct in the top section.

Before being loaded with the existing detail from BARS, this grid is completely blank. Once loaded, this “Contract/Grant Details” grid contains all Object 08 and Object 12 line items that currently exist within the BARS system for a specific agency. Users are unable to budget Object 08 or Object 12 expenditures without first assigning those expenditures against a contract in this grid, which consists of the following information:

Contract/Grant

Agency Subobject

Contract/Grant Type

Fund

Unit

FY 20XX Actuals (PY)

Program

FY 20XX Working (CY)

Sub-Program

FY 20XX Current (BY)

Object

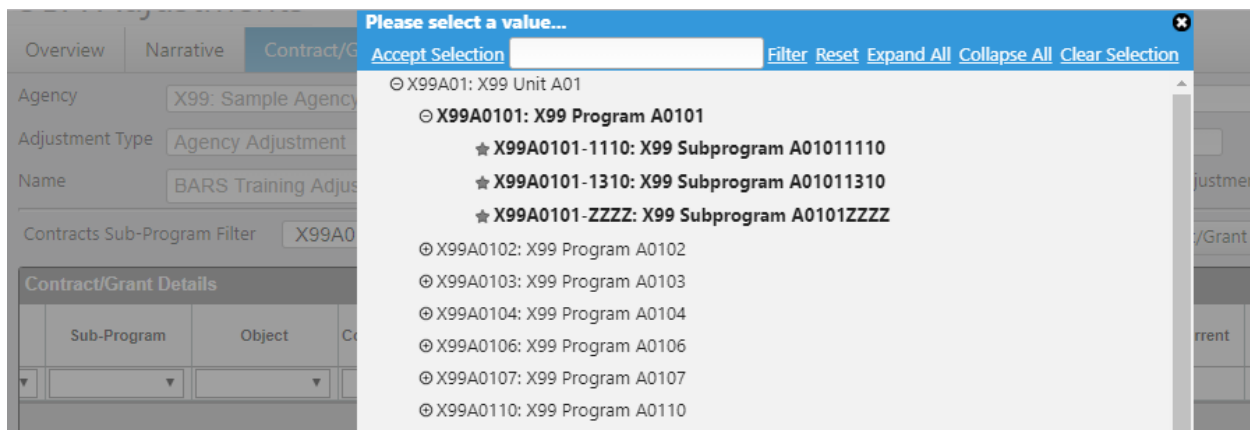
FY 20XX Adjustment

Comptroller Subobject

All line item detail in this grid has been assigned a “Contract/Grant” reference name that runs from the detail of the former “Upper Grid” which is now located on a separate “Maintain Contracts and Grants” maintenance page.

Users should begin by clicking on the magnifying glass icon and selecting the desired Unit/Program/Subprogram in the window. To load a specific subdivision of an agency, click on that program or subprogram to highlight that portion of the budget. Once you have highlighted all of the desired units, programs, and subprograms, select **Accept Selection** to ready those sections of the budget to be loaded.

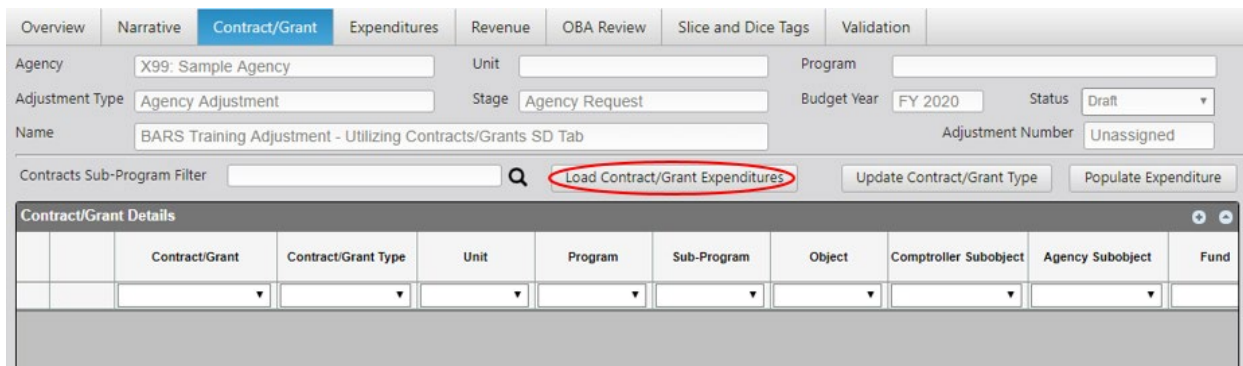
Click on the **Load Contract/Grant Expenditures** button to bring up the agency’s existing list of Object 08 and Object 12 line items in the BARS system.



The screenshot displays a software interface with a selection dialog box. The dialog box has a title bar that says "Please select a value..." and a close button. Below the title bar, there is a search input field with the text "Accept Selection" and several action buttons: "Filter", "Reset", "Expand All", "Collapse All", and "Clear Selection". The main content of the dialog is a tree view of budget items:

- ⊖ X99A01: X99 Unit A01
 - ⊖ X99A0101: X99 Program A0101
 - ★ X99A0101-1110: X99 Subprogram A01011110
 - ★ X99A0101-1310: X99 Subprogram A01011310
 - ★ X99A0101-ZZZZ: X99 Subprogram A0101ZZZZ
 - ⊖ X99A0102: X99 Program A0102
 - ⊖ X99A0103: X99 Program A0103
 - ⊖ X99A0104: X99 Program A0104
 - ⊖ X99A0106: X99 Program A0106
 - ⊖ X99A0107: X99 Program A0107
 - ⊖ X99A0110: X99 Program A0110

The background of the screenshot shows a partially visible interface with tabs for "Overview", "Narrative", and "Contract/G". There are also input fields for "Agency" (X99: Sample Agency), "Adjustment Type" (Agency Adjustment), and "Name" (BARS Training Adjust). A "Contracts Sub-Program Filter" is set to "X99A0". At the bottom, there is a "Contract/Grant Details" table with columns for "Sub-Program" and "Object".



Overview Narrative **Contract/Grant** Expenditures Revenue OBA Review Slice and Dice Tags Validation

Agency X99: Sample Agency Unit Program

Adjustment Type Agency Adjustment Stage Agency Request Budget Year FY 2020 Status Draft

Name BARS Training Adjustment - Utilizing Contracts/Grants SD Tab Adjustment Number Unassigned

Contracts Sub-Program Filter

Contract/Grant Details									
Contract/Grant	Contract/Grant Type	Unit	Program	Sub-Program	Object	Comptroller Subobject	Agency Subobject	Fund	

To adjust existing contract/grant details lines, after selecting **Load Contract/Grant Expenditures** to populate the existing sections of the budget into the Contract/Grant Details grid below, which displays the existing expenditure data in BARS for the specific Stage and Status, funds may be added or subtracted within the “FY 20XX Adjustment” column. The number entered into this column is ***additive*** to the budget dollars already included in the rightmost “FY 20XX” column. Agencies are also encouraged to include additional detail on the adjustment using the “Comment” column to expand upon the desired Adjustment.

Key Concept: Miscellaneous Contracts/Grants

- Each contract greater than \$50,000 must have its own Contract/Grant name and should be budgeted on its own line (or lines if budgeted in more than one subprogram in an agency).
- Contracts within one subprogram that are less than \$50,000 must be included on one line together (not listed separately), selecting “Miscellaneous” or “Miscellaneous Contract” as the contract name (different agencies use different variations of this name). These should be budgeted using the correct comptroller subobject.
- Agencies should avoid budgeting any miscellaneous expenses in subobject 0899. In fact, it is strongly recommended that agencies use subobject 0899 only if there is no other appropriate subobject, the main exception being instances where there is an agency subobject that further defines the category of expenditure. Be prepared to explain the detail behind any items included in 0899.

If you believe you have an instance that should be an exception to these rules, talk to your OBA analyst, as DBM has worked with agencies for several years to clean up this data.

Step 5:

If the user cannot find a contract/grant (first column) in the grid and therefore need to create a new contract/grant to complete their adjustment work, select **Save** at the top right corner of the screen or **Submit** to “Continue Working” and exit to the Worktray. Then follow separate guidance regarding using the **Maintain Contracts and Grants** management screen.

Once **all** required Contracts and Grants have been entered into the Contract/Grant Maintenance screen and approved by agency approver personnel, users may return to the original adjustment to complete the detail required for the budget submission.


Step 6:

After returning to the original adjustment, to add *additional contract/grant details lines* to the SD tab of an adjustment, users must first select the “Add” button at the bottom left of the Contract/Grant Details grid. Users are provided with a blank line that must be filled with the following information:

Contract/Grant	Comptroller Subobject
Contract/Grant Type	Agency Subobject
Unit	Fund
Program	FY 20XX Current (BY)
Sub-Program	FY 20XX Adjustment
Object	

Note: When entering or selecting data for the “Contract/Grant” column, this cell must match the exact record for an initialized “Name” in the Contract/Grant Maintenance screen.

Users are encouraged to include any pertinent information regarding the line item(s) in the “Comment” column, and there is a large limit to the number of characters in this field. Examples of comments may include rates and units of service, assumed inflation, etc.

Note: If the contract/grant has multiple fund types, they must be split across multiple lines with different “Fund” column selections. In these cases, users may use the  “Copy” icon at the beginning of each line to duplicate this data quickly, then alter the “Fund” column.

Step 7:

After entering all of the above required data or making any changes to existing lines, this data must be transferred to the Expenditures Tab through the “Populate Expenditures” button at the upper right above the grid, highlighted below.

This will bring all of the subobject adjustment funding data for Object 08 and 12 over to the Expenditures Tab, where it cannot be adjusted without making additional changes within the Contract/Grant SD Tab. As with all adjustments, users must complete the Revenue Tab and clear all validation requirements to submit the adjustment successfully.