

# Utilizing the Contractual SD Tab

## Introduction

The Contractual Positions SD Tab is a required supporting detail tab for any changes to contractual position data within an agency, including adjustments to existing contractual position data released within the BARS system. Whenever a user seeks to make changes to comptroller subobject 0220 on the Expenditures tab, they must do so on the Contractual Positions SD Tab first. The Contractual Positions SD Tab also allows the user to calculate contractual fringes based on the salary columns of each contractual line.

### Step 1:

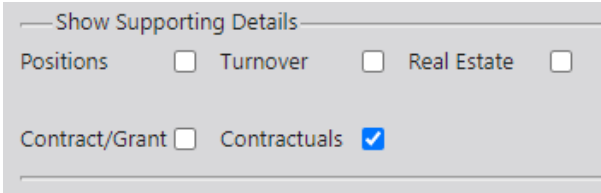
Log into BARS Production.

### 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 **Contractuals** button in the “Show Supporting Details” box at the bottom of the tab. This will bring up the hidden Contractual Positions SD Tab in the row of tabs at the top of the page.



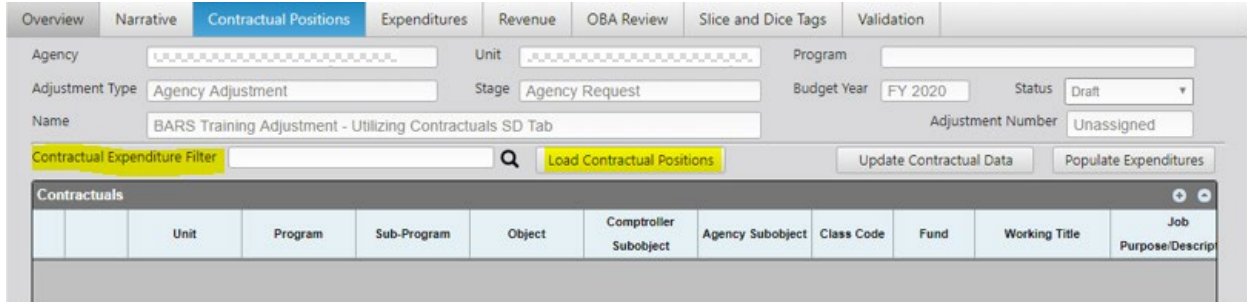
Show Supporting Details			
Positions	<input type="checkbox"/>	Turnover	<input type="checkbox"/>
		Real Estate	<input type="checkbox"/>
Contract/Grant	<input type="checkbox"/>	Contractuals	<input checked="" type="checkbox"/>

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.

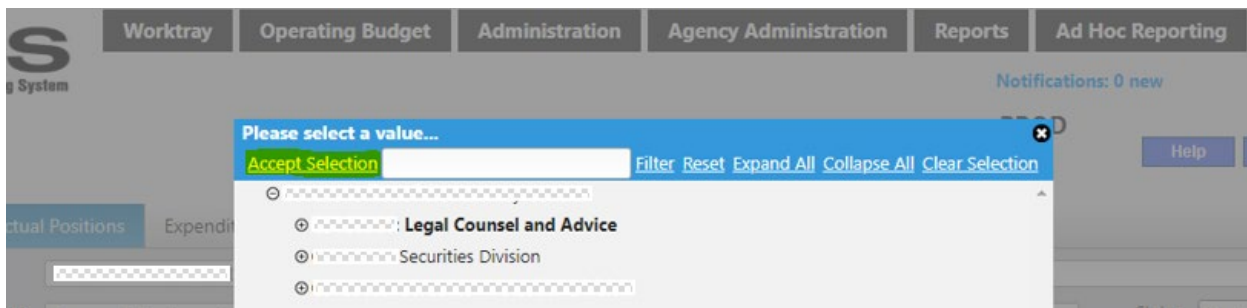
### Step 4:

In the Contractual Positions SD Tab—

Confirm the information brought over from the Overview Tab is correct in the top section, and select the magnifying glass under **Contractual Expenditure Filter** to bring up a window to select a specific unit, program, or subprogram of your agency where you want to make adjustments to contractual dollars (0220) or FTEs.




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.



To adjust **existing contractual positions**, select **Load Contractual Positions** to populate the existing sections of the budget into the Contractuals grid below, which displays the existing data in BARS for the specific Stage and Status. Once populated, FTEs may be added or subtracted from a given contractual line within the “FY 20XX FTE Adjustment” column and funds may be added or subtracted within the “FY 20XX Dollars Adjustment” column, and is **additive** to the budget dollars already included in the “FY 20XX Current” column. Agencies may also include additional detail on the adjustment using the “Comment” column to expand upon the desired Adjustment.

Users are not able to make direct adjustments to the “FY 20XX FICA” and “FY 20XX Unemployment” columns, which sum to the “Benefit Change” column number. These numbers run directly off of the total of the contractual salary columns for the given line. The **Update Contractual Data** button will automatically calculate these benefits off of the sum total contractual salary. However, per the note below, if users need to they can revise the fringe values on the Expenditure tab.




FY 2019 Dollars	FY 2020 Approved FTE	FY 2020 Approved Dollars	FY 2020 Approved FICA	FY 2020 Approved Unemployment	FY 2020 FTE Adjustment	FY 2020 Dollars Adjustment	FY 2020 FICA	FY 2020 Unemployment	Benefit Change	Comment
\$0	0.00	\$0	\$0	\$0	0.00	\$0	\$0	\$0	\$0	
\$9,500	0.25	\$9,500	\$727	\$27	-0.05	(\$1,500)	(\$115)	(\$4)	(\$119)	
\$33,000	0.25	\$33,000	\$2,525	\$92	0.00	\$0	\$0	\$0	\$0	

*Note: Beyond the general adjustment validations, the only validation required by this tab is that each contractual line has at least a 1 FTE to \$20,000 contractual salary ratio.*

### Step 5:

To add **additional contractual positions/lines** to the SD tab, users must first select the “Add” button at the bottom left of the Contractuals grid. Users are provided with a blank line that must be filled with the following information:

- **Unit/Program/Sub-Program Columns:** Data supporting contractual employment must be completed at the subprogram level of detail in order to validate in the adjustment.
- **Fund:** This column should record one of the following codes for the fund type supporting the contractual position each year (01 General Funds, 03 Special Funds, 05 Federal Funds, 25 CARES Funds, 35 CRRSAA Funds, 45 ARPA Funds, 07 Non-Budgeted Funds, 09 Reimbursable Funds, 40 Current Unrestricted Funds, and 43 Current Restricted Funds).  
*Note: If the contractual positions have 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.*
- **Class Code:** Multiple contractual positions with the same classification in each subprogram may be listed together and shown as a full-time equivalent for the year. For example: 4.25 could represent 17 interpreters who each work on average 3 months per year.
- **Working Title:** This column indicates the title of the provided Class Code and will be pre-populated by BARS based on the selected class code.
  - The “Working Title” Column is populated by the “Class Code” column, but only after the **Update Contractual Data** button has been selected. For brand new contractual FTE lines, none of the “Approved” lines will have data or be available for edit. As with the above adjustment instructions, the benefits columns do not require manual adjustment.
- **Job Purpose/Description:** Enter a brief description of the work the contractual position(s) does, including any additional justification.
  - This should be at least one sentence, preferably more, and there is a large limit to the number of characters in this field.
  - Note that BARS will consolidate into one row any contractals with the same subprogram, class code, and fund type, so if those positions will be doing different work please describe that in detail using the “Job Purpose/Description” field.
- **Fiscal Year FTE Adjustment:** If the position is full-time, indicate “1.00.” Otherwise, indicate the percentage (to the nearest hundredth) of the position used for each year. A total should be provided for this column. One 1.00 FTE that is funded by multiple fund types should be split across multiple Contractual lines, with a 0.50 general fund line and a separate 0.50 special fund line indicating a contractual position budgeted 50/50 GF/SF.
- **Fiscal Year Dollars Adjustment:** Record the total salary for the contractual position, excluding Social Security or other fringe benefits. These amounts will set the 0220 funds for each reported year at the level (i.e., subprogram) where contractual employees are

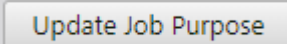
reported. Total funds in each line must maintain at least a 1.00:\$20,000 FTE-to-salary ratio in order to ensure that the state is not budgeting less than minimum wage.

- **Comment:** Enter any additional detail to report for the position, such as contractual turnover rate.

*Note: Unusual contracts involving an employer employee relationship between a contractor and the contracting State agency may be consolidated into a single line on this form. This single line must contain a total FTE count for the contracts in this category and the dollar amounts entered in the appropriate columns for the appropriate fiscal years. Types of unusual contracts include:*

- Policy exemptions such as students, patients, inmates, direct emergency services, School for the Deaf direct student services, college faculty, on-duty physicians, Board of Public Works, Governor's Office, and intermittent unemployment insurance claims;
- Contracts in the Legislative and Judicial branches of government; and
- Exemptions based on State law.

**\*\*NOTE:** The "Job Purpose/Description" field can now be updated for a specific subprogram/class code, fund type combination in the Contractuals grid by simply typing in the revised "Job

Purpose/Description" then clicking the  button. This functionality updates the BARS database without an adjustment even needing to be submitted and is a great way to clean up the data.

If users want to only see the rows in the grid that they have adjusted, click "Clear Zero Rows."

### Step 6:

After entering all of the above required data or making any changes to existing lines, users must select the "Update Contractual Data" button. Once this has been done, this data must be transferred to the Expenditures Tab through the "Populate Expenditures" button at the upper right above the grid, highlighted below.

Contractual Expenditure Filter <input type="text"/> <input type="button" value="Load Contractual Positions"/> <input type="button" value="Update Contractual Data"/> <input type="button" value="Populate Expenditures"/>										
Contractuals										
FY 2019 Dollars	FY 2020 Approved FTE	FY 2020 Approved Dollars	FY 2020 Approved FICA	FY 2020 Approved Unemployment	FY 2020 FTE Adjustment	FY 2020 Dollars Adjustment	FY 2020 FICA	FY 2020 Unemployment	Benefit Change	Comment
					3.25	\$276,250	\$21,133	\$774	\$21,907	PT Sysadmin - Kari,

This will bring all of the subobject adjustment funding data (0220, 0213, and 0214) over to the Expenditures Tab.

0220 cannot be adjusted without making additional changes within the Contractual Positions SD Tab, but 0213 and 0214 can be changed on the Expenditures grid only if users choose. As with all adjustments, users must complete Revenue Tab and clear all validation requirements to submit the adjustment successfully.