

FY 2026 Budget Request - Position Reconciliation Guidance and Instructions

Introduction

Agencies will use BARS to review the Budget Year (BY) position data and to make adjustments for any position data elements that need to be updated for their BY request. The starting point for FY 2026 Position Reconciliation (POS REC) is represented by the following formula:

FY 2025 Gov Allowance + Legislative adjustments + Approved collective bargaining actions or COLA's = FY 2026 starting point.

Agencies will begin the POS REC process for the BY Request in July. During POS REC, agencies will have the ability to process all needed position adjustments in BARS through to the “Released” (i.e. finalized) stage. Position adjustments processed during POS REC will be fully incorporated into the expenditures grid and become a final part of the budget request. Once POS REC is complete, agencies are to notify DBM that the task is finished by sending an e-mail to dlbudgethelp_dbm@maryland.gov and copying the OBA Analyst. Agencies must complete their POS REC work by the due date provided in the DBM guidance email.

Agency Preparation - Position Reconciliation (POS REC) - Reviewing Workday Data

Prior to the POS REC process in BARS, agencies should ensure their Workday data is up to date and accurate.

As part of the Workday review, agencies should:

- A. Update Workday to include new positions that were approved during the most recent legislative session. Agencies are required to provide the newly created 6-digit Workday PINs to DBM so that DBM can implement the conversion, in BARS, of the associated “N” PINs to the new 6-digit Workday PIN.
- B. Ensure that Workday is up to date for information relating to position location (i.e. subprogram), class code, grade, step, and fund source. Having this data up to date will make the BARS POS REC process much easier once it begins.
- C. Compare BARS and Workday data to plan the changes that will be needed in BARS to bring that data up to date.

For abolished PINs, DBM will work with the Office of Personnel Services and Benefits (OPSB) to abolish PINs in Workday. DBM will also incorporate the position reductions in BARS on behalf of the agencies. Agencies will be provided a list of the new and abolished PINs.

Position Reports

BARS has several very useful position reports under the Reports tab to assist agencies in reviewing position data as part of their prep work.

1. **Position Detail** provides an Excel-friendly raw data extract of all agency personal data. To start, agencies will want to select the applicable year for the current request cycle, “Agency Request” for Budget Stage, and “Released” for Adjustment Status. Once POS REC has begun, agencies can add other “statuses” to the report which show the impact of the adjustments they are working on.

2. **Workday Difference** shows only positions that have differences between BARS and Workday for subprogram location, FTE, salary, class code, grade, step, retirement plan, increment month, and fund split. Any data points that match for a position are blank so users can focus on differences. Agencies should select the current Agency Request year as Fiscal Year Stage. Only “Released” adjustments are included in this report.
3. **Position Baseline Comparison** displays an agency’s position data for both the FY 2025 Legislative Appropriation (which in turn is the baseline for FY 2026) and the FY 2026 Agency Request (which will reflect any adjustments you make during POS REC) for a side-by-side comparison. This is the “What did I just do?” report, and enables an agency to view the entirety of its position information in an easy to review format.
4. **Position Reconciliation Budget Impact** highlights the budget impacts of fund split changes, reclassifications, and other POS REC adjustments. This is important to review to ensure the adjustments made through POS REC have not moved the agency’s budget too far from FY 2025 Legislative Appropriation amounts by fund.

New Last Year - Increment Change

Per the instructions below, DBM’s recommendation during Position Reconciliation is to use the “Copy Workday” functionality as much as possible, which saves users considerable time and effort. However, at the time of Position Reconciliation, employees set to receive the FY 2025 increment in January would be without an increment even though BARS FY 2026 data has been updated to reflect all increments. To avoid “Copy Workday” from removing the increment for those positions (thus under-budgeting salaries), BARS developers have implemented the following:

- a. If a position is updated in BARS with an increment/step, it is flagged in the back of the system as having received that step.
- b. When Workday data is imported into BARS, in the Position grid data for these positions will automatically update to the new step even if Workday itself still has the old step.
- c. Users can therefore still use “Copy Workday” to expedite the Position Reconciliation process without incorrectly reducing the salaries of positions.

Overview Guidance

Workday Data - In the position tab of an adjustment, BARS provides a comparison of the FY 2026 position data in BARS and Workday position data. BARS provides a daily interface with Workday.

This Workday data has no impact on your budget unless you change BARS information based on (or copying from) that data. Rather, the Workday columns are an informative tool for analysis of the BARS data. Do not think that because the Workday column is correct everything is good to go—if the BARS data columns do not match that data, you will still need to make the adjustment. Agencies can use this comparison to identify adjustments that may be needed in BARS and/or updates in Workday. If users see Workday data from another Agency, it means BARS is accounting for PIN transfers between Agencies and Workday has not yet caught up to those changes. Users may move or change those PINs, but if users are applying the “Copy Workday location” option, please do not include those PINs.

Chart of Accounts (COA) and Object/Items - Agencies are encouraged to review their agency’s units, programs, subprograms, or agency subobjects in BARS through the Agency Administration-COA Maintenance TAB. The BARS Chart of Accounts (COA) must be up to date in order for an agency to select any new account codes when making adjustments. Changes to the COA or Object/Items can be made

using the Agency Administration Tab - COA Maintenance (at the subprogram level only). Changes to Unit or Program level must be requested through the Technical Data & Systems (TDS) Team at OBA. Please notify TDS that COA and/or Object/Item work items were created and have been submitted to OBA so we can “Approve” and “Release” the work item. Agencies need to send an e-mail to: dLbudget.help@maryland.gov and copy your assigned OBA Analyst.

At What Level to Make Adjustments - During the POS REC process, agencies can process one adjustment for the entire agency, adjustments for each unit, or adjustments for each program. OBA recommends that agencies make adjustments at levels that are manageable (i.e. at the unit level for large agencies). This will limit the number of adjustments that will need to be managed and approved. **Agencies should limit the number of PINs adjusted in per work item adjustment to 300 or fewer positions.** Including more than 300 may cause performance issues.

Agency Coordinator - Agencies are encouraged to appoint at least one user to coordinate that the overall agency position data is correct. Multiple adjustments will be made by agencies to move and change position data, and OBA has learned that this requires at least one point person to coordinate that all adjustments are complete and accurate.

Key Concepts

Position Adjustments in BARS

- Order of operation is critical in BARS.
- A move and a change may not be done in a single work item; they must be done as separate work items and in respective order of operation.

A. Order of Operation -

1. **MOVE Positions 1st** - Process all position moves (i.e. - changing the subprogram assignment) first and submit through to “Released” before making any other changes to an individual PIN.
2. **Changes Positions 2nd** - **FUND, CLASS CODE, STEP AND OTHER POSITION CHANGES** - should be done last and submitted through to “Released”.

Following the above guidance will assure that positions are in the correct locations prior to making any adjustments to class codes, fund source etc., which could impact expenditures and will ultimately serve as the salary object values for BY request cycle.

B. Reorganizations -

Do not include PIN adjustments for reorganizations unless they have received official prior approval from DBM. ***PLEASE DISCUSS WITH YOUR OBAANALYST.***

C. “Position Reconciliation” as an Adjustment Type -

An agency’s ability to push position-related work items all the way through to “Released” is only available using the “Position Reconciliation” Adjustment Type. Position Reconciliation as an Adjustment Type is only available to Agencies during the official POS REC process time frame (late July through late August). During this time period, Agencies have the ability to move AND change PIN data any way they wish and have the ability to push adjustments all the way through to “Released” on their own. After the POS REC cycle, the Position Reconciliation Adjustment Type will no longer be visible to Agencies.

D. Position adjustments after POS REC has closed -

After the POS REC cycle has closed, agencies may still create BARS positions adjustments, but they will be limited to *either a PIN move or a PIN change* but not both, even in separate work items. In addition to using a different adjustment type, position adjustments after POS REC can only be submitted to Unit Approved and will need to go through the Budget Request Submission (BRS).

E. Vacancies -

Workday should be used as a guide in reviewing and updating the staffing status.

- Identify vacant positions using Workday (snapshot of vacancies on the day the report is run).
- The number of vacancies should be within historical levels.
- Use comp object 0112 during the budget request if additional funding for reclassifications is necessary, but generally OBA advises agencies to utilize the POS REC exercise to budget for known promotions or PIN downgrades (i.e. after a known retirement).

F. Turnover & Health Insurance -

Turnover and Health Insurance (HI) expenditures are not part of the POS REC process. However, as agencies adjust their positions through Position Reconciliation, they should be mindful of the impact on their budget request:

1. If positions are moved or salary costs are changed, agencies should also adjust turnover (0189) via adjustment in the budget request so the turnover expectancy percentage remains reasonable for each subprogram by fund type. The Turnover tab functionality can help expedite this process (see separate guide).
2. Health insurance subobjects (0152 and 0154) are controlled subobjects and cannot be adjusted by agency/fund type with budget submission. However, if positions are moved, added, or abolished, 0152 and 0154 should also be realigned between units, programs, and subprograms through the budget submission process. This realignment will require a separate adjustment.

Please see Budget Instructions for guidance on updating these expenditure areas through the budget request process.

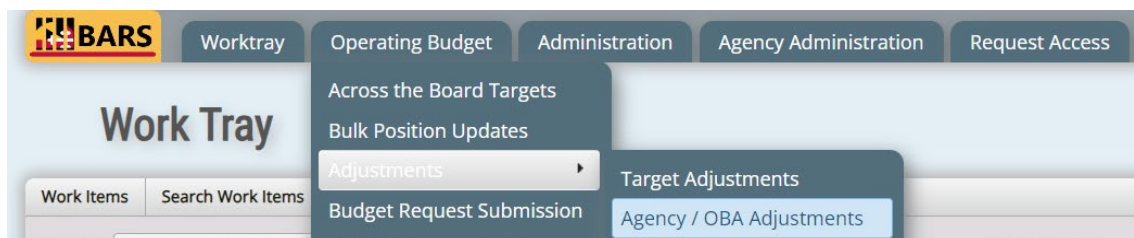
G. DBM Support -

Both your assigned DBM analyst and the TDS Team within the Office of Budget Analysis are available to respond to any questions and provide assistance. Please contact your OBA analyst first for assistance.

Steps for Creating Agency Position Adjustments in BARS - BY Request Instructions (Guidance for prior fiscal years is later in the document).

Step 1 - Getting to the “Agency Adjustment” screen in BARS.

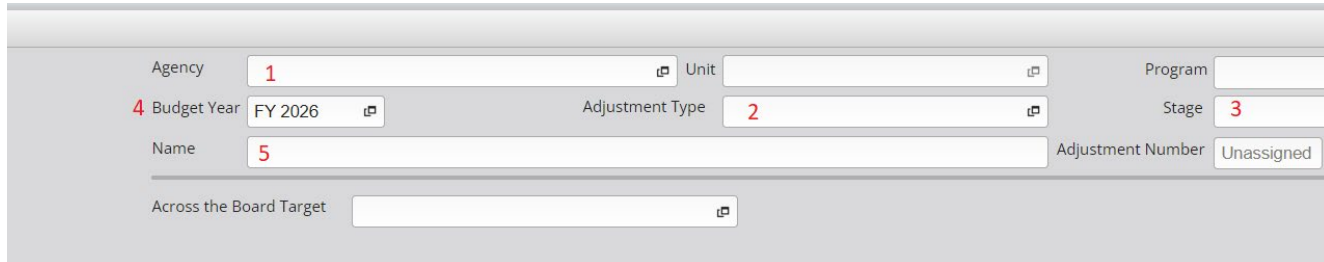
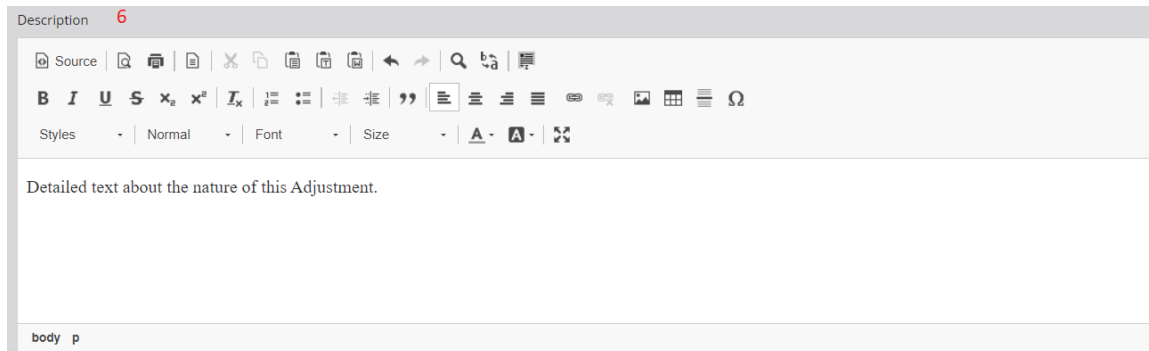
Under “Connect Maryland Secure Portal” Log into BARS Production. This will take you to the BARS homepage Worktray. In the BARS Worktray, place your cursor over the **Operating Budget** tab at the top of the page, select **Adjustments > Agency / OBA Adjustments**.



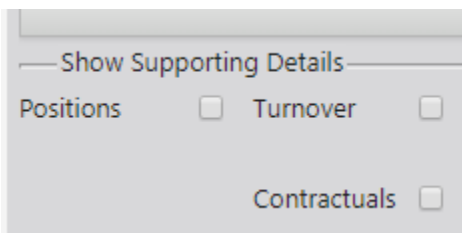
Step 2 - Completing the Overview Tab:

In the Overview Tab – Set up for Budget Year (BY) Position Reconciliation.

Selects: (1) Select **Agency**, (2) Set adjustment type to **Position Reconciliation**, (3) set Stage to **Agency Request**, (4) Set Budget year to **FY 2026**, (5) Create **Name** for the adjustment, and (6) Provide a **Description** of the adjustment in the description box. Agencies may add any information in this section, including dollar figures, program name and budget location, or a synopsis of the agency justification. It is suggested that agencies develop a system of naming conventions, e.g. - “POS REC - [Unite Code]” to make them easier to research later.

Next, under **Show Supporting Detail (SD)** towards the bottom of the screen, select the Positions box.



A Positions tab will now appear as an available option between the Narrative and Expenditures tabs.

Step 3 - Position Tab

The Positions Tab has upper and lower grids. The Position Review grid (top grid) is used to view and select position data for editing. The Positions grid (bottom grid) is used to make edits to the position data selected.

To bring in your position data, select the search button next to the **Position Sub-Program Filter**. A box will appear allowing you to select all programs or by a specific unit, program, or subprogram for your agency. Select the programs, etc. you wish to edit (they will become bolded). Selecting the Unit level will bold all levels underneath it. Selecting by Program will bold all subprograms within in it. The user may unselect a program or subprogram by clicking it again (bolded subprograms are the ones that will load). For smaller agencies, it is feasible to make all of their position changes in one adjustment,

however for the larger agencies, the position adjustments should be limited to 300 PINs.

Position Sub-Program Filter

Drop down box sample:

Select Position Sub-Program Filter

Expand All Collapse All Remove Value Search Confirm Selection

- A15000: Payments to Civil Divisions of the State - A15000: Payments to Civil Divisions of the State
- A1500001: Disparity Grants - A1500001: Disparity Grants
- A1500001-1BSL: Disparity Grants - A1500001-1BSL: Disparity Grants
- A1500002: Teacher Retirement Supplemental Grants - A1500002: Teacher Retirement Supplemental Grants
- A1500002-2BSL: Teacher Retirement Supplemental Grants - A1500002-2BSL: Teacher Retirement Supplemental
- A1500003: Miscellaneous Grants - A1500003: Miscellaneous Grants
- A1500003-3BSL: Miscellaneous Grants - A1500003-3BSL: Miscellaneous Grants

Once you have selected all of the program data you want to look at, click on “Confirm Selection” on the top left. This will ready BARS to load only those sections of the agency’s positions. Also note that there are other actions on the top right that can be performed such as Filter, Reset, Expand All, etc.

Positions Expenditures Revenue OBA Review Slice and Dice Tags Validation

Agency C90: Public Service Commission Unit Program

Budget Year FY 2026 Adjustment Type Position Reconciliation Stage Agency Request

Name Adjustment Number 61374 Status Create

Position Sub-Program Filter C90G0001G001, C90G0002G002, C90G0003G003, C90G0004G004 Load PIN Data Show COA Names Edit PINs

The Position Sub-Program Filter now reflects the list of subprograms for which PIN information will be loaded. Select “Load PIN Data” and the upper grid will populate with PIN data. The position data will include both BARS and Workday information for location, class code, job title, FTE number, etc.

Position Sub-Program Filter C90G0001G001, C90G0002G002, C90G0003G003, C90G0004G004 Load PIN Data Show COA Names Edit PINs

Position Review												
Select for Edit	Unit	Program	Subprogram	WD Subprogram	Class Code	WD Class Code	PIN Number	Job Title	WD Job Title	FTE Number	WD FTE Number	
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	9030	9030	001958	PSC Commission Ad	PSC Commission Ad	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	6096	6096	001960	Administrator III-60	Administrator III	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	2043	2043	001963	Admin Spec III-2043	Admin Spec III	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	5052	5052	001969	Exec Assoc II-5052	Exec Assoc II	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	7656	7656	001970	Exec Secy Public Ser	Exec Secy Public Ser	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	5483	5483	001971	Prgm Mgr Senior II-5	Prgm Mgr Senior II	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	2650	2650	001972	Management Associ	Management Associ	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	6095	6095	001974	Administrator II-609	Administrator II	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	9691	9691	001975	Executive Senior-96	Executive Senior	1.00	1	1
<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	9202	9202	001976	Commissioner Pub	Commissioner Pub	1.00	1	1

BARS will highlight any instances where BARS does not match Workday

Step	WD Step
0	0
11	11
19	19
9	12
23	24
24	24

Step 3.A - Selecting PINs for Edit - Position Review (Top Grid) -

There are two ways to select PINs for edit.

1) Individually check all of the boxes on the left side of the screen under “Select for Edit” next to the PIN(s) you wish to edit and then select the “Edit PINs” box, OR

Use filters to help refine and aid in selecting PINs for edit. Click on a column to sort by that item.

Position Sub-Program Filter: C90G0001G001, C90G0002G002, C90G0003G003, C90G0004G004

Load PIN Data Show COA Names Edit PINs

	Select for Edit	Unit	Program	Subprogram	WD Subprogram	Class Code	WD Class Code	PIN Number	Job Title	WD Job Title	FTE Number	WD FTE Number
1	<input checked="" type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	9030	9030	001958	PSC Commission Ad	PSC Commission Ad	1.00	1.00
2	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	6096	6096	001960	Administrator III-609	Administrator III	1.00	1.00
3	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	2043	2043	001963	Admin Spec III-2043	Admin Spec III	1.00	1.00
4	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	5052	5052	001969	Exec Assoc II-5052	Exec Assoc II	1.00	1.00
5	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	7656	7656	001970	Exec Secy Public Ser	Exec Secy Public Ser	1.00	1.00
6	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	5483	5483	001971	Prgm Mgr Senior II-5	Prgm Mgr Senior II	1.00	1.00
7	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	2650	2650	001972	Management Associ	Management Associ	1.00	1.00
8	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	6095	6095	001974	Administrator II-609	Administrator II	1.00	1.00
9	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	9691	9691	001975	Executive Senior-96	Executive Senior	1.00	1.00
10	<input type="checkbox"/>	G00	01	C90G0001-G00...	C90G0001-G001	9202	9202	001976	Commissioner Pub	Commissioner Pub	1.00	1.00
											163.00	144.00

Select All Page 1 of 2 100 View 1 - 100 of 163

2) Use the Location Discrepancy and Class/Step Discrepancy on the far right of the upper grid to select PINs. Click on the Column to sort “checked or unchecked” then scroll back to the left and select the box next to “Select for Edit.” Doing so with Location Discrepancy will choose all positions where there is a location difference between BARS and Workday, whether it be subprogram, program, or unit. Choosing Class/Step Discrepancy will select all positions where there is a difference in class or step between BARS and Workday. Once PINs have been checked, select the “Edit PINs” box.

Sorting for checked Discrepancy PIN reflected

Location Discrepancy	Class/Step Discrepancy ↕
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>

Sample Select for Edit

Position Review		
	Select for Edit	Unit
1	<input checked="" type="checkbox"/>	G00
2	<input checked="" type="checkbox"/>	G00
3	<input checked="" type="checkbox"/>	G00
4	<input checked="" type="checkbox"/>	G00
5	<input checked="" type="checkbox"/>	G00
6	<input checked="" type="checkbox"/>	G00
7	<input checked="" type="checkbox"/>	G00
8	<input checked="" type="checkbox"/>	G00
9	<input checked="" type="checkbox"/>	G00
10	<input checked="" type="checkbox"/>	G00

Select All

Step 3.B - Editing PINs - Positions (Bottom Grid)

Once a user has selected PINs and clicked on the “Edit PINs” box, the lower grid will populate with the PIN data associated with selected PINs from the upper grid.

Users may choose to edit PINs directly in the lower grid or, if there are a lot of PINs, export the lower grid to Excel.

Set All Actions to:												
											Update PIN Data	Populate Expenditure
Positions	Position	Action	Agency	WD Agency	Unit	Program	Subprogram	WD Subprogram	Class Code	WD Class Code	Job Title	FTE Number
1	001969		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	5052	5052	Exec Assoc II-5052	
2	001970		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	7656	7656	Exec Secy Public Service Comm-7656	
3	002003		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	1756	1756	Admin Spec II-1756	
4	002012		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	5483	5483	Prgm Mgr Senior II-5483	
5	002032		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	5021	5021	Asst Gen Counsel III Pub Ser Com-5	
6	047451		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	2247	2588	Admin Officer III-2247	
7	047453		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	5483	5484	Prgm Mgr Senior II-5483	
8	049360		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	4535	4528	Fiscal Services Officer II-4535	
9	052975		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	2247	2247	Admin Officer III-2247	
10	052977		C90	C90	G00	01	C90G0001-G001: ...	C90G0001-G001: ...	2247	3003	Admin Officer III-2247	

Select All Copy WD Location
 Select All Copy WD Class/Step

Page 1 of 1 View 1 - 18 of 18 Clear All

After the lower grid is populated, if a user wants to include additional PINs, they must “Clear” the

lower grid, go back to the upper grid, select the additional PINs under the “Select for Edit” column and click “Edit PINs” again to populate lower grid. If you no longer want to edit a PIN the in the lower grid, click the search button in the Action column and select “Unchanged”, BUT DO NOT SELECT THE DELETE BUTTON.

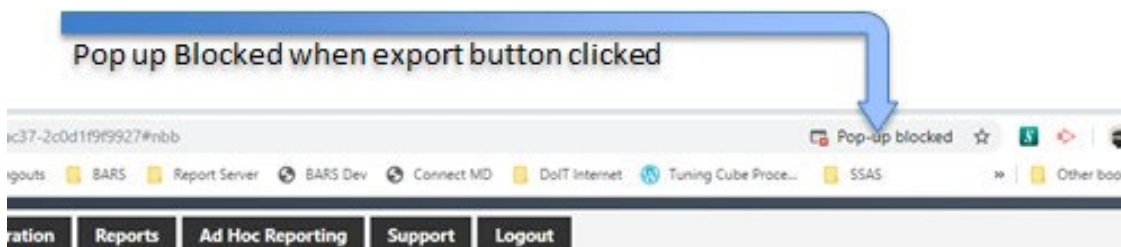
Exporting to Excel -

If there are many PINs being edited, users may choose to export the lower grid position data to Excel, make edits, and then import the file back into the lower grid. Once the lower grid is populated, you can export the PINs to Excel by clicking the **Export** button located in the bar under the lower grid.

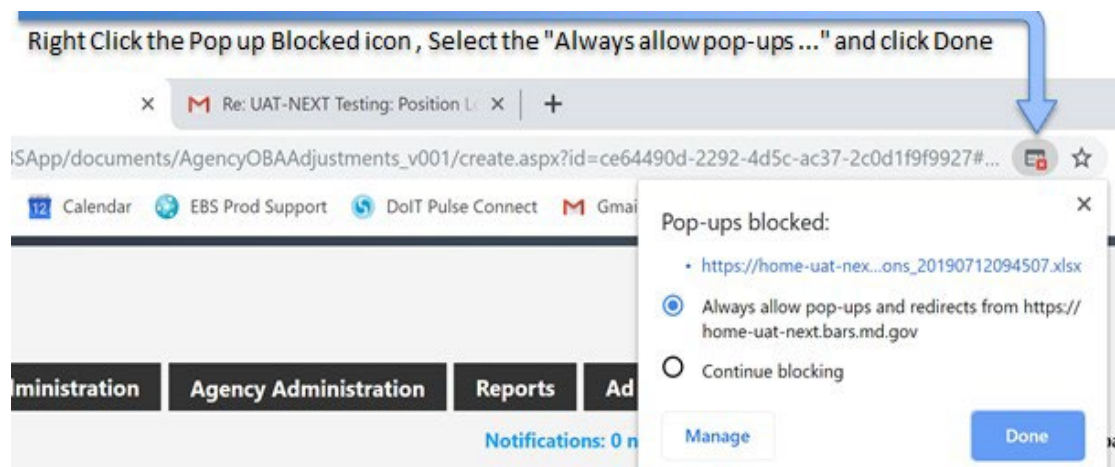


Depending upon your browser settings, an Excel file will immediately open with your data OR a file tab will appear in the lower left hand of your screen.

For some users the Export is blocked by the browser's pop-up blocker. In Chrome, that should look like this:



If you see the red X, then



Do not clear the BARS lower Positions grid after EXPORT if you intend to reimport changed data back into BARS. For any positions you would no longer like to edit, type “Unchanged” into the **Action** column. The user may not add new PINs for edit into Excel and import them into the grid.

Importing in BARS -

To **Import** a file, click the Choose File option from the bar located under the lower grid, select the file, and then select import.

Choose File No file chosen

Import

Export

As a reminder, please process adjustments using the guidelines below:

1. Users may NOT process a move and a change to one PIN in the same adjustment. Moves and changes must be done as separate work items.
2. MOVES - Process all position moves first and approve through to “Release” before making any fund or class code changes to a PIN.
3. FUND, CLASS CODE, STEP, AND OTHER POSITION CHANGES - should be done last.

BARS will not allow users to edit a PIN that is flight in another work item that has not been submitted to either “Released” or “Voided”. If a PIN in flight has been inadvertently included in a work item, when the user goes to Submit, they will received the validation error message below.

Overview	Narrative	Positions	Expenditures	Revenue	OBA Review	Slice and Dice Tags	Validation
<p>✘ You must either remove the PIN : 034433 from this adjustment or remove it from adjustment # 13772</p> <p>✘ You must either remove the PIN : 039346 from this adjustment or remove it from adjustment # 13772</p> <p>✘ You must either remove the PIN : 039371 from this adjustment or remove it from adjustment # 13772</p> <p>✘ You must either remove the PIN : 039387 from this adjustment or remove it from adjustment # 13772</p> <p>✘ You must either remove the PIN : 039390 from this adjustment or remove it from adjustment # 13772</p>							

Users have only two options at this point:

- 1) Submit the current work item to “Continue Working” and then to go to the **other** work item in flight and submit it to either “Released” or “Void” OR
- 2) In the lower grid of the **current** work item, select “UNCHANGED” next to the PIN evoking the validation error. Otherwise, you will be unable to Submit the current work item.

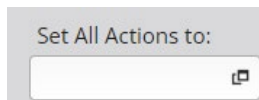
3.B.1 - Set Action First

For each position in the lower grid, users **must first** choose the **Action** they want to implement in the second column of the grid. Options include:

- **Abolish** - If a position is no longer valid. *Note:* Position Reconciliation adjustments do not allow a net change in FTE total, so if any positions have been abolished in an adjustment another position must also be added in the same adjustment.
- **Add** - This action auto-populates if a row is added to the grid. *Note:* Position Reconciliation adjustments do not allow a net change in FTE, so if any positions have been added in an adjustment another position must also be abolished in the same adjustment. Also, if you add a position, users cannot add a PIN number themselves in the grid - BARS will add a placeholder PIN number starting with “N” for you upon submission.
- **Attach to Workday**. *This is an OBA-specific function, and not available to agency users. If an agency needs to add a workday PIN due to changing of FTE, contact TDS. Example - PIN was 1.0 FTE and gets split into two .50 FTE. Or two .50 FTEs are combined to create a new 1.0 FTE (only applies if new workday #).*
- **Move** - Select this option if positions are moving elsewhere in the agency’s chart of accounts (i.e. changing subprogram, program, and/or unit). Again, positions can only be moved **or** changed in an adjustment, not both.

- **Change** - Select this option if edits are needed to any non-location data for a position (class code, step, staffing status, fund split, etc.).

If all of the positions in the Positions Grid will have the same action, users can select the **Set All Actions to** button, select the action, and that action will auto-populate in the Action column of the grid.



The image shows a button labeled "Set All Actions to:" with a dropdown menu icon to its right. The dropdown menu is currently closed, showing a blank white space.

3.B.2 - Change Options

Allowed changes are based on the Action selected. For example, if **Move** is selected, users are limited to only editing chart of account data. If **Change** is selected, users can edit all of the following items:

- **Fund Type** - Ensure that the sum of General Fund %, Special Fund %, Federal Fund %, Reimbursable Fund %, and Non-Budget Fund % equals 100%. Agencies should ensure that the allocation of fund type is correct as the Copy Workday feature does not include fund type. Changing of fund types must be done in BARS. **BARS calculates Object 01 salary and fringe values based on fund type so it is essential that agencies look at fund types to ensure they are correct.**
- **Class Code** - This selection drives the Grade, Job Title, and the salary (when combined with step and FTE number).
- **FTE Number** - Agencies should ensure that no FTE exceeds 1.0 FTE and the final FTE count reconciles to expected POSCON totals by program and agency.
- **Step** - Users must verify the steps are complete and correct, with no null values, as this directly impacts budgeted salaries.
- **Slope, Flat Rate, and Executive Pay Plan Positions** - This column should be checked for such positions. Users verify that the salary data is consistent with Workday and make adjustments accordingly (only for these positions can salaries be hard keyed in).
- **Increment Month** - Ensure that each position has January (01 in Excel) if the employee Entry of Duty (EOD) date *is between Jan. 1 and Jun. 30*, or July (07 in Excel) if the EOD is *between Jul. 1 and Dec. 31*. Positions will default to July if field is blank.
- **Retirement Code** - Verify that the field is filled with the appropriate retirement code for this position. Select the "No Retirement" option if the employee is not entitled to retirement. **Accuracy of retirement codes is important as BARS calculates retirement costs based associated retirement rate tables. If the code is wrong, the wrong rate and subobject will be used.**
- **Staffing Status** - In general, users should update this field to match Workday data unless there are open recruitments or impending retirements. Note: any position with staffing status of "open" or "frozen" will be rebased to the appropriate step (zero in most instances).

The Workday columns are not editable fields in BARS.

Useful Tip - Copy Workday Functionality

If users want to copy the Workday either (a) location or (b) class/step/staffing (filled/vacant/open) into BARS, the lower Positions grid has a very useful functionality. Simply scroll over to the right in that grid and you will see the following columns.

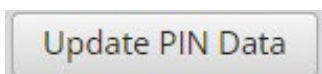
Copy WD Location	Copy WD Class/Step/Staffing
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>

If (a) was your intention, you must have **Move** as your Action then select either the entire column or individual rows to Copy WD location, and if (b) is your plan then **Change** must be your Action then you can select that column or individual rows. Selecting the checkbox at the top of the column will select all positions with the correct action and with relevant differences between Workday BARS. Note that Copy WD Class/Step/Staffing does not copy any *other* information from WD (fund type , FTE, etc.).

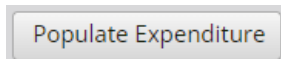
Please note that positions in BARS have been updated for increments based on the July/January increment month. The positions with January increments will not be updated in Workday at the time of POSREC. Be careful not to use "**Copy Workday- Class/Step**" functionality for these positions as it would lower the salary values.

Step 3.B.3 - Action to Update PIN Data and Expenditure Grid

Once all desired edits/changes have been made in the grid, select **Update PIN Data** button above the lower grid.



Next, select the **Populate Expenditure** button above the lower grid.



Step 3.B.4 - Verification of Expenditure Tab & Populating Revenue Tab

In the Expenditures Tab—

Confirm the information brought over from the Positions Tab is correct, particularly if your agency uses agency subobjects (i.e. ensure the correct subobject codes are populated). If you want to view the changes in the context of existing budget numbers, select the search button beside the **Expenditure Subprogram Filter** to bring up a window to select a specific unit, program, or subprogram of your agency.

Narrative **Expenditures** Revenue OBA Review Slice and Dice Tags Validation

Agency: A15: Payments to Civil Divisions of the State Unit: Program:

Budget Year: FY 2025 Adjustment Type: Agency Adjustment Stage: Agency Additional Request

Name: Example Adjustment Number: Unassigned Status: Create

Expenditure Sub-Program Filter: Object Filter: Load Show COA Names: Clear All: Popula

Expenditure Financials

	Source	Unit	Program	Subprogram	Object	Comptroller Subobject	Fund	FY 2025 Target	FY 2025 Current	FY 20 Adjus
--	--------	------	---------	------------	--------	-----------------------	------	----------------	-----------------	-------------

To load a specific subdivision of an agency, click on that program or subprogram to bold that portion of the budget. Once you have bolded all of the desired units, programs, and subprograms, select **Confirm Selection** to ready those sections of the budget to be loaded.

Select Expenditure Sub-Program Filter

Expand All Collapse All Remove Value Search Confirm Selection

A1500001: Disparity Grants - A1500001: Disparity Grants
 A1500001-1BSL: Disparity Grants - A1500001-1BSL: Disparity Grants

Select **Load** to populate the readied sections of the budget into the Expenditure Financials grid below. Once the data has been reviewed, select **Populate Revenue** to bring the expenditure dollars over to the funding side of the adjustment.

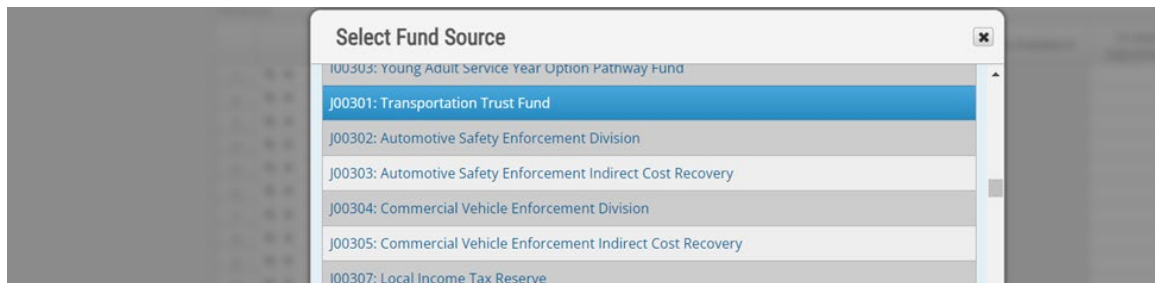
Step 3.B.5 - Verification of Revenue Tab

In the Revenue Tab—

Confirm that the desired funds are in the “FY20XX Adjustment” column . Existing revenue may be loaded using the **Revenue Program Filter** similar to the Subprogram Filter in the Expenditure Financials grid. This will bring up additional unit and program selectors to populate the Revenue grid with fund values already uploaded and “Released” within BARS.

Revenue										
Agency	R13: Morgan State University				Unit			Program		
Budget Year	FY 2026		Adjustment Type	Position Reconciliation			Stage	Governors Allowance		
Name					Adjustment Number	Unassigned		Status	Creat	
Revenue Program Filter					Load	Show COA				
Revenue										
		Unit	Program	Fund Type	Fund Source	FY 2025 Working	FY 2026 Current	Grant Available \$	FY 2026 Adjustment	
1		M00	R13M0001: Instructi...	40: CUR	CUR40: Current Unr...	\$83,322,361	\$83,322,361			
2		M00	R13M0001: Instructi...	43: CR	CR43: Current Restr...	\$80,000	\$80,000			
3		M00	R13M0002: Research	40: CUR	CUR40: Current Unr...	\$19,685,917	\$19,685,917			
4		M00	R13M0002: Research	43: CR	CR43: Current Restr...	\$63,500,000	\$63,500,000			
5		M00	R13M0003: Public S...	40: CUR	CUR40: Current Unr...	\$278,747	\$278,747			
6		M00	R13M0004: Academ...	40: CUR	CUR40: Current Unr...	\$39,994,452	\$39,994,452			

If the adjustment includes non-General Funds, the agency must identify the specific source of the funds in the “Fund Source” column. Click on the search button and select from the list of available fund sources. If further guidance is needed, see separate user guide on utilizing the Revenue Tab.



Step 3.B.6 -Submit Work Item

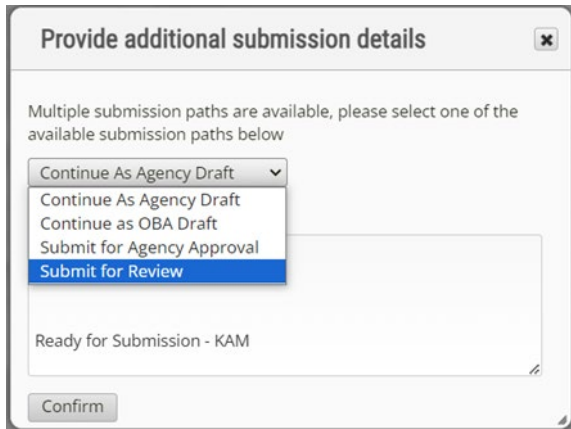
Once you have determined that the desired changes have been made and the Expenditures and Revenue dollars are as expected, select the blue **Submit** button blue on the top right of the screen.

You will be prompted to “Continue Working” or “Submit for Review”. If you plan to continue working at a future time, add a work comment and select to Continue Working.

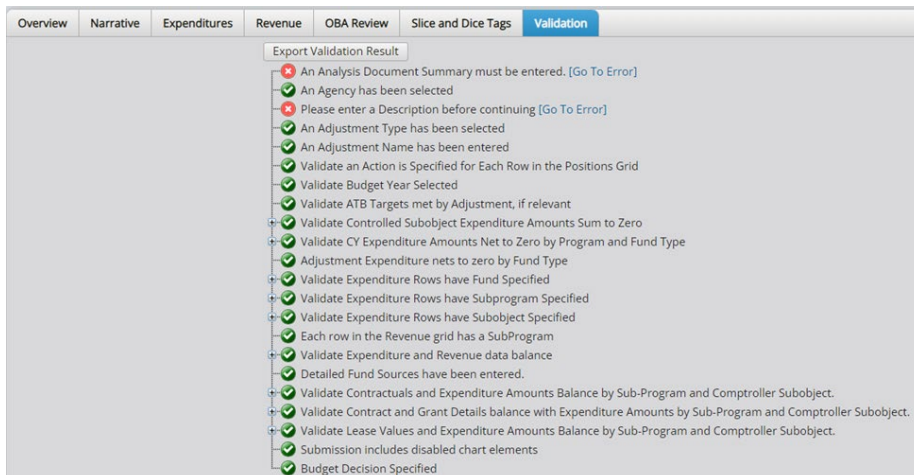
If you are finished and ready to move on, add a work comment and click the Submit for Program Approval button. If there are no validation errors (see below), a blue ribbon will appear at the top of your screen confirming submission success. You may want to write down the work item number that is generated in order to help track adjustments and find the item in the future (this is a five digit number unique to each action taken in BARS).

During Position Reconciliation, agencies should submit position actions to “Released”. Go back to the

worktray, select the work item and Submit to the next status level and repeat until “Released” (i.e. Submit for Program Approval, then Unit Approval, then Agency Approval, then Release).



Unfortunately, if there are validation errors, you must correct them before moving on. Once fixed, follow guidance to Submit.



Creating Position Adjustments in BARS - Current Year

Agencies must contact TDS and their OBA Analyst for guidance BEFORE making any changes in BARS for CY 2026. Current year position adjustments are limited to material changes such as DBM approved reorganizations and thus require amendments. See separate guidance on budget amendments for more specific instructions.

Steps for Creating Position Adjustments in BARS - Prior Year (Actuals)

Working on Prior Year (PY) positions is done as part of the budget submission process rather than specifically during POS REC, and related adjustments therefore go through the BRS when an agency submits their entire budget. Changes should be limited to material changes, such as approved reorganizations or to omit contractual positions dollar reflecting as permanent positions. Moves within the FTE count (between units/programs) must net to zero. Total FTE counts may NOT change, and expenditures changes may not be less than the current total.

Users can adjust PY position data by creating a work item in much the same way as instructed for the BY Request starting on page 4. User would need to select the Adjustment Type **Actuals Adjustment**

and the stage will default to Agency Actuals and the year will change to the PY fiscal year. Next check the box next to positions and the following new tab will appear at the top - "Prior Year Positions Count." Go to the PY Position Tab, select PY Positions Program Filter and the select Load PY Summary.

Expenditure Overview	Revenue Overview	Fund Balance	Position Overview	Contractual Positions	PY Position Summary	Contracts	Real Estate Leases	Higher Education
Agency	R13: Morgan State University	Unit		Program				
Name	BRS _ Adjustment release test			Status	Draft	Budget Year	2026	
Budget Request Number	60261	Submission Level	Agency		Submission Type	Agency		
Prior Year Position Summary								
	Unit	Program	Appropriation FTE	Appropriation Salaries	Amended FTE	Amended Salaries	CPB FTE	CPB Salaries
1	R13M00: Morgan State University	R13M0001: Instruction	442.00	\$42,504,943	442.00	\$42,504,943	442.00	\$42,504,943
2	R13M00: Morgan State University	R13M0002: Research	252.00	\$21,625,085	252.00	\$21,625,085	252.00	\$21,625,085
3	R13M00: Morgan State University	R13M0003: Public Service	1.00	\$77,982	1.00	\$77,982	1.00	\$77,982
4	R13M00: Morgan State University	R13M0004: Academic Support	218.00	\$19,069,201	218.00	\$19,069,201	218.00	\$19,069,201
5	R13M00: Morgan State University	R13M0005: Student Services	85.00	\$5,350,317	85.00	\$5,350,317	85.00	\$5,350,317
6	R13M00: Morgan State University	R13M0006: Institutional Support	334.00	\$28,039,791	334.00	\$28,039,791	334.00	\$28,039,791
7	R13M00: Morgan State University	R13M0007: Operation and Maintena...	169.00	\$8,811,995	169.00	\$8,811,995	169.00	\$8,811,995
8	R13M00: Morgan State University	R13M0008: Auxiliary Enterprises	165.00	\$10,024,207	165.00	\$10,024,207	165.00	\$10,024,207

Review the PY Position Summary tab, make changes as needed to the FTE counts or salaries, using the Adjustment columns to the right. In total, users cannot change FTE PIN counts for the agency. Once PY adjustments are complete, Submit to **Continue Working** or Submit through "Unit Approved"; depending upon whether or not you are finished working on actual PIN data.

Again, PY position adjustments are done through the budget submission not during the official POS REC process. As such, **related adjustments cannot be directly "Released" by the agency but must be submitted through the BRS module.**

Submission to DBM

1. E-mail dlbudgethelp_dbm@maryland.gov and your OBA analyst notifying them that the agency position reconciliation is complete and ready for review. Subject line should be 3-digit agency code and POS REC Ready for Review. Example: **F10 POS REC Ready for Review.**