

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:

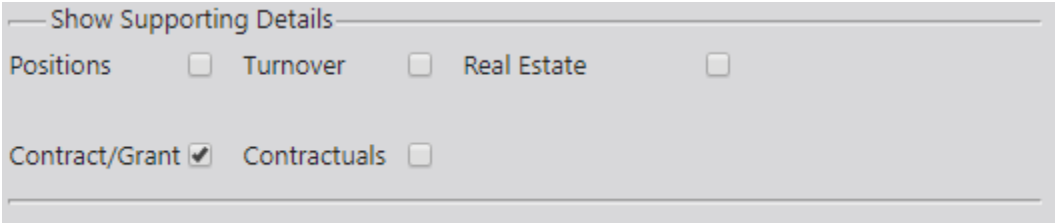
Log into BARS Production

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 Turnover Real Estate

Contract/Grant Contractuals

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:

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	Program
Contract/Grant Type	Sub-Program
Unit	Object

Comptroller Subobject

FY 20XX Current (BY)


Agency Subobject

FY 20XX Adjustment

Fund

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.