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To aid in the Grant Control Table maintenance process, the Grant-29 form is similar in format to the Grant Control Table Maintenance screen (S029) in STARS. Be sure to sign and date the form.

GRANT-29 FORM INSTRUCTIONS

The following instructions are the same as used by the State Controller's Office.

Data Element	Description
AGENCY NAME	The name of your agency
AGENCY CODE	Your three digit agency number
CONTACT NAME	Name of person to contact regarding Grant information
PHONE # - EXT	Phone number of Contact person
DATE	Date the form is filled out
A=Add C=Chg	A – ADD a new record C – CHANGE an existing record DELETE is not used. You can remove grant records through the purge process
GRANT NUMBER GRANT PHASE	Enter the six-character Grant Number and the two-alphanumeric Grant Phase assigned by your agency. If you are not dividing the Grant into phases, enter zeros (00) in the Grant Phase field.
FEDERAL ID	Enter the twenty-character Federal ID Number or leave blank. You should enter this number if this is a federal grant. This can usually be found on your grant award notification.
DESCRIPTION	Enter the Grant Description, up to forty characters.

GRANT TYPE	Enter the one-digit GRANT TYPE: 1 – Federal Grant 2 – State Grant 3 – Other Grant
PRI	Payroll Indicator. Y – Yes, is used for payroll N – No, is not used for payroll
START DATE	Enter the six-digit Grant Start Date (MMDDYY) or leave blank. If entered, this date identifies the effective start date for posting to the grant. You cannot make postings to this grant before the effective start date. If you do not enter a start date, postings can begin at any time.
END DATE	Enter the six-digit Grant End Date (MMDDYY) or leave blank. If entered, this date identifies the effective end date for posting to the grant. You cannot make postings to this grant after the effective end date. If you do not enter an end date, you can make postings at any time.
LOOKUP PROJECT NO LOOKUP PROJECT PHASE	Enter the six-character Lookup Project Number and the two-alphanumeric Lookup Project Phase or leave both fields blank. STARS uses the Lookup Project Number/Phase to associate a Project/Phase with the Grant/Phase defined in the Grant Control Table. If your transaction code supports the Grant file, STARS simultaneously posts the Project with the same transaction information. You must have the project set up on your agency’s Project Control (27) Table before you can enter this lookup.

For the following elements or *indicators*, you should understand the implications before you enter and submit them. Be sure you know how to make adjustments if you submit the incorrect information.

- Once submitted, you should not change these indicators even at year-end, since grants are not restricted to fiscal years. However, if you need to make a change, we recommend that you make the change on the Grant for the new grant year.
- The level on the Grant Control Table will be the level displayed on the online Grant File Inquiry screens (66 and 77).
- If a high degree of detail is required for reporting purposes then this indicator must reflect that degree of detail. Reports can be produced which give information at more summarized levels, but reports will cannot be ordered for a lower level of detail then is posted to the file. This level should be the lowest level of detail that you may want on your reports and online.

Data Element	Description
(EXP) OBJECT POST LEVEL	<p>Enter the one-character Expenditure Object Posting Level indicator that determines the Expenditure Object level that STARS will post transactions to the Grant File and if it posts with a Fund. The valid indicators are as follows:</p> <p style="text-align: center;"><u>FUND OBJECT LEVEL</u></p> <p>0 – No FUND, No Exp Object 1 – No FUND, EXP OBJECT level 2 – No FUND, EXP SUMMARY OBJECT level 3 – No FUND, EXP SUBOBJECT level 4 – No FUND, EXP SUBOBJECT DETAIL level</p> <p>-OR-</p> <p>A – FUND, No Exp Object B – FUND, EXP OBJECT level C – FUND, EXP SUMMARY OBJECT level D – FUND, EXP SUBOBJECT level E – FUND, EXP SUBOBJECT DETAIL level</p> <p>Note: You must post your Grant budgets at this level if you are using budgetary controls. When budgets are not used, this indicator should be set at the lowest level desired for reporting and on-line inquiry.</p>

<p>REVENUE POST LEVEL</p>	<p>Enter the one-digit Revenue Object Posting Level indicator that identifies the level of Revenue Object that STARS will post a Grant in the Grant File. The types of indicators are as follows:</p> <p style="text-align: center;"><u>OBJECT LEVEL</u></p> <p>0 – No Rev Object</p> <p>1 – REV OBJECT level</p> <p>2 – REV SUMMARY OBJECT level</p> <p>3 – REV SUBOBJECT level</p> <p>4 – REV SUBOBJECT DETAIL level</p>
<p>BUDGET CTL TYPE</p>	<p>NOTE: You can change the budget control type without problems to the reporting or online screens. Enter budgets into STARS through the standard data entry process.</p> <p>Enter the one-digit Budget Control Type indicator. Identifies whether STARS will control the Grant Expendable Budget Control on a fatal or warning basis, if at all. Values are as follows:</p> <p>0 – NONE - No Control. All transactions will post and STARS will issue no error messages. You can make postings in excess of the grant budget.</p> <p>1 – FATAL - Fatal Control. Expenditures over the grant budget will not post and STARS will issue a fatal error message. You must enter a large enough grant expendable budget to allow an expenditure transaction to post against the grant.</p> <p>2 – WARNING - Warning Control. Expenditures over the grant budget will post and STARS will issue a warning error message. To avoid constant generation of warning messages, you should enter adequate expendable budgets.</p> <p>See the Grant Budgeting chapter for more information.</p>
<p>CATALOG NUMBER</p>	<p>Enter the eight-character Catalog (CFDA) Number or leave blank. You should use catalog numbers on all Federal grants and subgrantees. The CFDA number normally includes a two-character federal agency code, a (.), and an additional three characters. See the Catalog of Federal Domestic Assistance which has a variety of ways to search for the needed number.</p>
<p>PURGE INDICATOR</p>	<p>Enter the one-character Purge Indicator.</p> <p>N – Grant not ready for purge. Use for new grant setups.</p> <p>Y – Grant closed, ready for purge.</p>

<p>CASH POST LEVEL</p>	<p>Enter the one-digit Grant Cash Control Posting Level indicator that identifies whether the Grant Cash will post to the Grant level on the Cash Control File (63). The indicator types are as follows:</p> <p>0 – No separate Grant Cash Control. Cash can be spent up to the amount of the cash in the fund or fund detail, not restricted by grant. CASH CTL TYPE must be ‘0’, No control.</p> <p>1 – Maintain separate Grant Cash Control. Only this grant/fund can use the cash posted to this grant/fund. If not enough cash is available in the grant and fund, STARS will not process expenditures.</p> <p>2 – Maintain separate Grant Phase Cash Control. Only this grant phase/fund can use the cash posted to this grant phase/fund. If not enough cash is available in the grant phase and fund, STARS will not process expenditures. Also posts grant/grant phase to the Average Daily Cash File.</p>
<p>CASH CTL TYPE</p>	<p>See CASH POST LEVEL above.</p> <p>Enter the one-digit Cash Control Type indicator that identifies whether STARS will control the Grant Cash Control on a fatal or warning basis.</p> <p>(If maintaining separate grant (1 cash post level) or grant phase (2 cash post level) cash posting, the CASH CTL TYPE must be set to the same as the Cash Control Type (CCT) of the fund on the D22 Table. Most should be ‘1’, Fatal control. Funds like the General Fund and Deficiency Warrant funds should be ‘0’.)</p> <p>Types are as follows:</p> <p>0 – NONE – No Control. All transactions will post and STARS will not issue any error messages. CASH POST LEVEL must be ‘0’, no separate grant cash control.</p> <p>1 – FATAL - Fatal Control. Expenditures in excess of the cash balance will not post and STARS will issue a fatal error message. CASH POST LEVEL must be ‘1’ (maintain cash at grant level) or ‘2’ (maintain cash at grant/phase level). You must set this level to the same Cash Control Type Level of the Fund on the D22 Table.</p> <p>2 – WARNING – Not Available.</p>

GL BY GRANT	<p>Enter the one-digit General Ledger Grant Level Posting indicator as follows:</p> <p>0 – Post transaction to the GL file at the fund/fund detail level only. Grant information will not post to the General Ledger file. Trial Balances will not generate down to the Grant level.</p> <p>1 – Post transactions to the GL file at the fund/fund detail grant level. Grant information will post to the General Ledger file. You can get trial balance reports down to the Grant level. You can see on-line postings to the Grant on the General Ledger files. (You can view cash balances (GL 1003) by Grant on Inquiry Screen 76.)</p> <p>2 – Post transactions to the GL file at the fund/fund detail grant/grant phase level (NEW) Grant and grant/phase information will post to the General Ledger file. You can get trial balances down to the individual grant/phase level.</p>
INT	<p>Enter the one-digit Interest indicator. Should be set to “N” - No unless SCO helpline has authorization and clarification from STO.</p>

The following elements are Information or Lookup elements used to reduce manual data entry:

<u>Data Element</u>	<u>Description</u>
GRANT MANAGER	Enter the name of the Grant Manager up to forty characters or leave blank. Identifies the grant manager or other optional information.
ORGANIZATION REPORTING CATEGORY	Enter the four-digit Organization Reporting Category or leave blank. Provides a statewide code that may be used for accumulating grant information across organization or program boundaries.

The following elements are for billing information. These define if, how, and when the grant will be billed. Although this billing function is not currently used, the following default values are described:

<u>Data Element</u>	<u>Description</u>
METHOD	0 – Grant not billed.
BILLING CYCLE	0 – Grant not billed.