OPS Contracts Module

Last updated: Jan 2022

About This Mural

This mural is for anyone attempting to help OPRE design a "contracts module" for its future system. Its goal is to make it easier to understand what users need in the future system and why, and to make it easier to consult existing research when questions arise.

Research — Pretty much everything we've learned about contracts at OPRE: the lifecycle of a contract from idea to award to close; the relationship between CANs, projects, contracts, and budget lines; the current system screens and artifacts OPRE uses to manage contracts; major pain points; and questions we still have.

Hypothesized Solution — Drawing on what we've learned and observed, this mural also contains what we think OPRE needs in its future system to manage contracts and budgets, in the form of decisions, user stories, and data plans.

This mural does NOT focus on invoicing, procurement, or Congressional reporting.

Research

Background on contracts at OPRE

See Life cycle of a contract — Open mural

User feedback on contracts in MAPS

See User feedback by module — Open link

Projects vs agreements/contracts

See User research activity summary — Open link

Relationship between CANs, projects, contracts, and budget lines

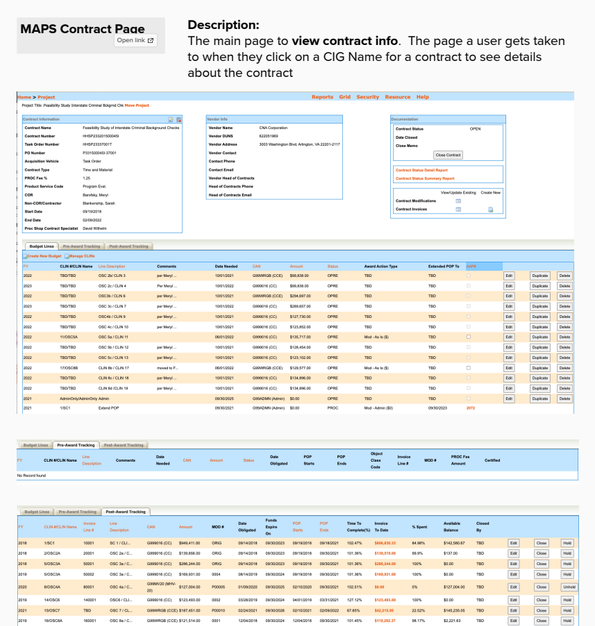
See Relationship diagrams — Open mural

Current state

Viewing a contract

MAPS Contract Page

Description: The main page to **view contract info**. The page a user gets taken to when they click on a CIG Name for a contract to see details about the contract



Who uses this?	What for?	When / How often?
Budget Officers	To check and/or update contract info. To create and/or update budget lines.	This is a textbox…
Project Leads / CORs	To get budget info/status. To enter invoices. To initiate AAPs (acquisition action plans).	At least monthly.

What data is on this page?

"Contract info": Project Title; Contract Name; Contract Number; Task Order Number; PO Number; Acquisition Vehicle (aka Acq Type); Contract Type; Proc Fee %; Product Service Code; COR; Non-COR / Contractor (Doubles as POC or project team member because system only allows for 1 COR); Start Date; End Date; Proc Shop Specialist

"Vendor info": Vendor Name; Vendor DUNS; Vendor Address; Vendor Contact; Contact Phone; Contact Email; Vendor Head of Contracts; Head of Contracts Phone; Head of Contracts Email

Other: Contract Status; Date Closed; Closed Memo

"Budget line info":

- Budget Lines: FY; CLIN # / CLIN Name; Line Description (Manually entered, should be a combo of CLIN #/Name and Service Component and CAN, to help with sorting (due to entering CLINs in inconsistently)); Comments; Date Needed; CAN; Amount; Status; Award Action Type (When do you care about this info?); Extended POP To (When do you care about this info?); AAP # (When do you care about this info?)
- Pre-Award: Date Obligated (When do you care about this info?); POP Starts (When do you care about this info?); POP Ends (When do you care about this info?); Object Class Code (What is this?); Invoice Line # (What is Invoice Line # for?); Mod # (When do you care about this info?); Proc Fee Amount; Certified
- Post-Award: Date Obligated; Funds Expire On; Time To Complete (%) (How helpful is Time to Complete?); Invoice to Date; % Spent; Available Balance; Closed By

What data is NOT on this page?

New Project (Contract) Template

MAPS New / Edit Budget Line modal: Proc % (Why is this editable at the Budget Line level (rather than contract level)?); Fee Doc # (What is this?); Fee Payment Ref # (What is this?)

Project Trackers

MAPS Contract Budget grid: Budget ID; Proc Fee Rate (Same as Proc %); Mod Type (Same as Award Action Type?); Proc Fee Pay Ref # (Same as Fee Payment Ref #)

MAPS OPRE Project Summary Table (report)

MAPS Contract Status Details Summary Report: Total Budget (Sum of all budget lines regardless of status); Total Awarded to Date (Funds that are obligated and certified (in post-award tracking in MAPS)); Balance Not Yet Awarded (Funds that are not yet obligated and certified (not in post-award tracking in MAPS)); Budget subtotals by FY

What actions can a user take from this page?

- General: Budget Officer only — Move (to a different) Project; Edit Contract Info; Close Contract. COR / Project Lead
- Financial: Budget Officer only — Create New Budget Line; Edit / Duplicate / Delete / Close / Hold Budget Line; Update Existing Invoices. COR / Project Lead — Create New Invoice; View Existing Invoices; View Invoices for a Budget Line; View Contract Status Detail Report; View Contract Status Summary Report
- Procurement: Budget Officer only — Update Existing Mods. COR / Project Lead — View Existing Mods; Group Budget Lines into an AAP; Manage CLINs

What actions can a user NOT take from this page?

MAPS Contract Budget grid: Who? — Mark Budget Line as "Doc Received"; Batch update Budget Lines

Feedback & Observations

General

There is a lot going on in this one page, which makes it confusing to use.
- There is no clear direction to the user about what they should use this page for.
- The info is not optimized for a task; it's all the info for all the tasks for all the users.

It is difficult to quickly see key information.
- The identifying information (the contract name) is not visually distinct.
- The contract name is different in MAPS than in the Project Catalog and website.
- The contract details a user cares most about are hidden among lots of other data.
- Procurement-related info is interspersed with contract-management-related info.
- Not all the data from the New Project Template are displayed.
- The top half of the page is consumed by a lot of info users rarely need to see.
- The project team is not listed.

Some actions/functions are unintuitive or rarely used.
- "Move Project" is actually "Change Project".
- Edit Vendor is actually available through Edit Contract Info
- No one closes contracts.
- Users don't know what Contract Status Details and Contract Status Summary reports are for.
  - But these reports look like the key details a user would want to see at a glance.
  - These reports could be good inspiration when designing the Contract Details page.

The breadcrumbs are unhelpful.
- They don't tell you what page you're on.
- Clicking on them does not navigate you to where you'd expect.

Budget lines

There is a lot going on in this table, which makes it confusing to use.
- The info is not optimized for a task; it's all the info for all the tasks for all the users.
- It combines financial management tasks with procurement management tasks.

Users find it difficult to understand budget lines.
- Users find the naming conventions difficult.
- The default sort order isn't obvious.
- Users don't understand what the Admin budget lines are for.
- Text is cut off, and there's no way to increase column width or hover/click for full text.
- Field order is different in different tabs.

Users find it difficult to understand the status of budget lines, money, and spending plans.
- Users don't understand that the different tabs are for budget lines in different statuses.
- There are more statuses that users care about than tabs.

Users find it difficult to find the budget line they care about, making mistakes more likely.
- Sorting by CLIN # / CLIN Name doesn't seem to sort alphabetically.
- Not all fields are available to sort by.
- The header row and the first column aren't frozen in place when the user scrolls.

Budget info is incomplete; users have to cobble together different reports to get an accurate picture of amount spent and amount available.
- It doesn't include amounts spent on fees and shared costs.
- There are no totals or sub-totals displayed.
- Percent remaining is not displayed.
- It doesn't track spending at a task level (more granular than the CLIN level).

Some actions/functions are unintuitive or rarely used.
- Workflow / UI pattern for updating budget line status is different for different statuses.
- User has to scroll past lots of fields to get to the 1-2 they might need to edit for budget line status.
- "Edit" on budget line does different things depending on which tab user is on, pops up confusingly named modals.
- Edit Budget Line: "Typically to Uncertify, so I can edit other parts of the line. Actually, I don't know why I'd edit this. Very rarely. Maybe if there was an old problem and we're trying to correct an issue (e.g., we put it on a wrong CAN)."
- Close Budget Line: Don't know what this does.

There are opportunities for automating logic worth considering. For example:
- Budget line status.
- Hold budget line (i.e., don't allow invoicing against this budget line if funds expire before being fully utilized).

There are pain points around entering CLIN and Service Component info, and workarounds created as a result. Inconsistently entered info can make searching and sorting more difficult.

Additional feedback from user interviews — Open link

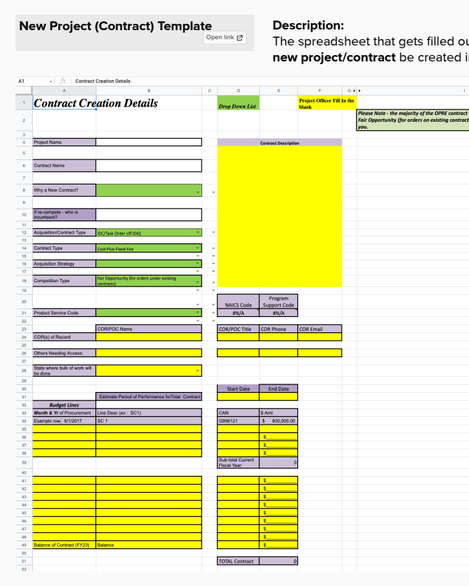
Questions

- When does a Budget Officer need to view contract details? — How often?
- When does a COR who is not the Project Lead need to view contract details? — How often?
- When does a CAN Lead or Division Director need to view contract details? — How often?
- What are the key fields a user most wants to see? — What's the difference between what a BO and a Project Lead need to see? — Would the Contract Status reports be a good starting point?
- What is a logical order to display the contract-related fields?
- What is a logical way to group budget lines? — By FY? — By CLIN? — By CAN? — By status?

Creating and editing a contract

New Project (Contract) Template

Description: The spreadsheet that gets filled out to **request a new project/contract** be created in MAPS



Who uses this?	What for?	When / How often?
Project Lead?	To request the Budget Officer to create a contract in MAPS	This is a textbox…
Budget Officer	To collect info from Project Leads so that they can create the contract in MAPS	

What data is on this page?

- Project Name (Created by Sheila, used in MAPS to know which MAPS project to create the contract under)
- Contract Name (Created by Sheila, doesn't always match or stay in sync with the names project teams use)
- Why a new contract? (Info needed for Small Business forecast (upcoming award actions) (OSDBU))
- If re-compete, who is invumbent? (Info needed for Small Business forecast (upcoming award actions) (OSDBU))
- Acquisition / Contract Type
- Contract Type
- Acquisition Strategy (Info needed for Small Business forecast (upcoming award actions) (OSDBU))
- Competition Type (Info needed for Small Business forecast (upcoming award actions) (OSDBU))
- Product Service Code (Info needed for Small Business forecast (upcoming award actions) (OSDBU). Proc shops require this for the acq plan. Populates NAICS Code. Should be Program Support Code Description moving forward)
- COR(s) of record (Name of COR(s) who will be responsible for managing contract)
- COR Title (Info needed for Small Business forecast (upcoming award actions) (OSDBU). Proc shops require this for the acq plan.)
- COR Phone / Email (Info needed for Small Business forecast (upcoming award actions) (OSDBU). Proc shops require this for the acq plan.)
- Others needing access (Appears in MAPS as Non-COR/ Contractor)
- State where bulk of work will be done (Info needed for Small Business forecast (upcoming award actions) (OSDBU). Proc shops require this for the acq plan.)
- Contract Description (Info needed for Small Business forecast (upcoming award actions) (OSDBU). Proc shops require this for the acq plan. Also SOW, Project Catalog, etc (but changes over time))
- NAICS Code (Info needed for Small Business forecast (upcoming award actions) (OSDBU). Proc shops require this for the acq plan. Populated by Product Service Code)
- Program Support Code (Code associated with Product Service Code text. This is the name to use moving forward.)
- Estimated POP Start Date
- Estimated POP End Date

Budget Lines: Month & Year of procurement (Date Needed in MAPS (which also includes day)); Line Description (Does OPRE have budget line info at this stage? (When does OPRE have this info?)); CAN; Amount; Sub-total Current FY (Are users supposed to split out current FY budget lines from future FYs?); Total Contract; Balance of Contract (How is this defined / calculated?)

For forecasts, need to know how much for this FY, and how much overall

Sometimes have details about future FYs, sometimes just know overall budget/balance

Feedback & Observations

This seems to be geared towards enabling procurement actions rather than budget planning.

Project and Contract names aren't aligned with naming used by program side.
Contract Details are entered here, and also in other places -- duplicative efforts, get out of sync.

COR details should be stored elsewhere and shouldn't have to be re-entered here.

Questions

- Who fills out this template? — Why are they filling it out / what are they trying to accomplish? — How often?
- What is their experience filling out this template?
- How does the Project Lead / program side break down (itemize) the contract's budget?
- What happens on the project/program side before this template is ready to be filled out? — Are there any artifacts that precede this template?
- Is all the data entered into MAPS?

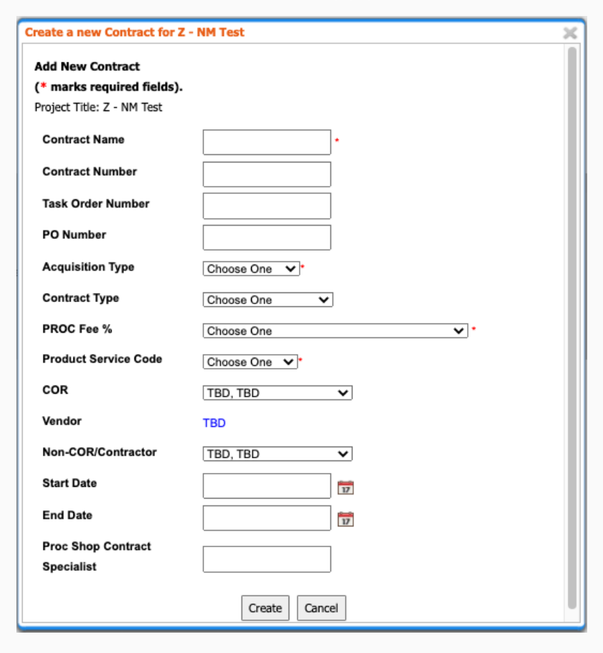
Require different fields depending on which year you're putting info for (this FY vs future FY)?

Need much more accuracy for this FY than for forecasts

Would need to input much less info to be able to track budget plans (most of this info is for acq planning)

MAPS New Contract

Description: The pop up a user sees to **create a new contract**



Create a new Contract for Z - NM Test

Add New Contract
(* marks required fields).
Project Title: Z - NM Test

Contract Name: *
Contract Number:
Task Order Number:
PO Number:
Acquisition Type: Choose One *
Contract Type: Choose One
PROC Fee %: Choose One *
Product Service Code: Choose One *
COR: TBD, TBD
Vendor: TBD
Non-COR/Contractor: TBD, TBD
Start Date:
End Date:
Proc Shop Contract Specialist:

Who uses this?	What for?	When / How often?
Budget Officer	To create a new contract in MAPS so that AAPs can be initiated	This is a textbox…

Feedback & Observations

This is quite different than the New Project Template
New fields: Contract Number, Task Order Number, PO Number, Proc Fee %, Proc Shop Specialist
Missing fields: Why a new contract, Incumbent, Acquisition Strategy, Competition Type, COR Title / Phone / Email, Others needing access, State where work will be done, Contract Description, NAICS Code, Sub-Total, Total, Balance

There is no organization/grouping of the fields to help guide a user.
- This is a mix of contract info and procurement info.
- Only 4 fields are required.
- The user has to enter Proc Fee % rather than just indicating which proc shop they're using.

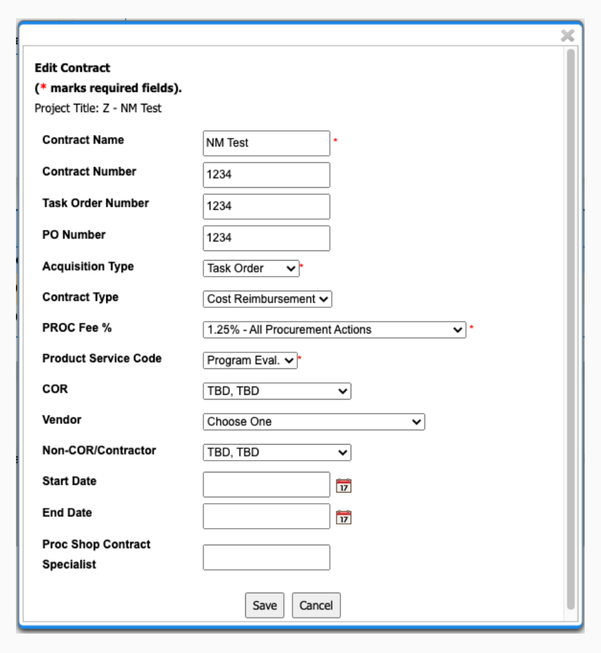
It is not obvious how to add budget line info.
- A user has to click create, get taken to the contract details page, then know to click "new budget line"

Questions

- When / why are you creating a contract in MAPS? — What is the immediate next thing this enables? — Why is this so different from the New Project Template?
- Which of this info do you usually have? — Why are these 4 fields (and only these 4) required?
- What is a logical order to enter this info? — Where are you sourcing this info from?
- Is there any info that would be ok for a non-Budget-Officer to enter?

MAPS Edit Contract

Description: The pop up a user sees to **edit a contract**



Edit Contract
(* marks required fields).
Project Title: Z - NM Test

Contract Name: NM Test *
Contract Number: 1234
Task Order Number: 1234
PO Number: 1234
Acquisition Type: Task Order *
Contract Type: Cost Reimbursement
PROC Fee %: 1.25% - All Procurement Actions *
Product Service Code: Program Eval. *
COR: TBD, TBD
Vendor: Choose One
Non-COR/Contractor: TBD, TBD
Start Date:
End Date:
Proc Shop Contract Specialist:

Who uses this?	What for?	When / How often?
Budget Officer		This is a textbox…

Feedback & Observations

This is the same as the New Contract modal, but with data filled it.

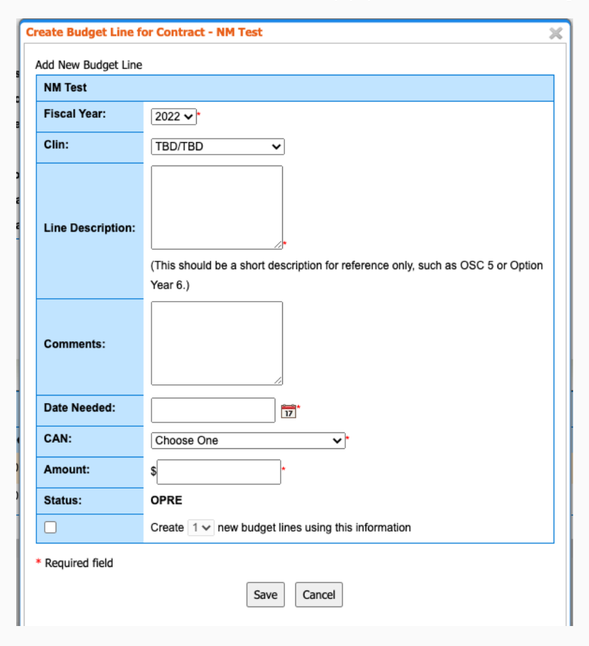
Vendor is now editable.

Questions

- When / why are you editing contract info in MAPS? — What fields do you need to edit?
- Is there any info that would be ok for a non-Budget-Officer to edit?

MAPS New Budget Line

Description: The pop up a user sees to **create a new budget line**



Create Budget Line for Contract - NM Test

Add New Budget Line
NM Test
Fiscal Year: 2022 *
Clin: TBD/TBD
Line Description:
(This should be a short description for reference only, such as OSC 5 or Option Year 6.)
Comments:
Date Needed:
CAN: Choose One *
Amount: $ *
Status: OPRE
☐ Create 1 new budget lines using this information

* Required field

Who uses this?	What for?	When / How often?
Budget Officer	This is a text box…	This is a textbox…

Feedback & Observations

Placeholder budget lines are created with TBD/TBD or Admin/Admin in a way that is confusing to some users.

The UI for creating multiple budget lines is non-intuitive, cumbersome, and error-prone.
- The BO often needs to create multiple budget lines at a time, with only small differences between them.
- Here, they have to create several of the same budget line, then go back in and edit each budget line and change the fields that are different.

CAN options should only be active CANs (CANs with funds available this FY).

Type-aheads would be useful.

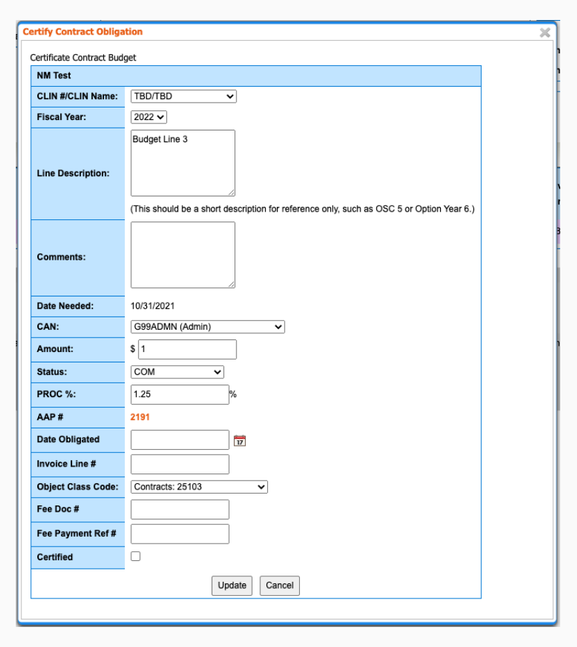
Comments box is tiny.

Questions

- At what point are budget lines created? — How much is known about them at that time?
- When / why do you create placeholder budget lines?

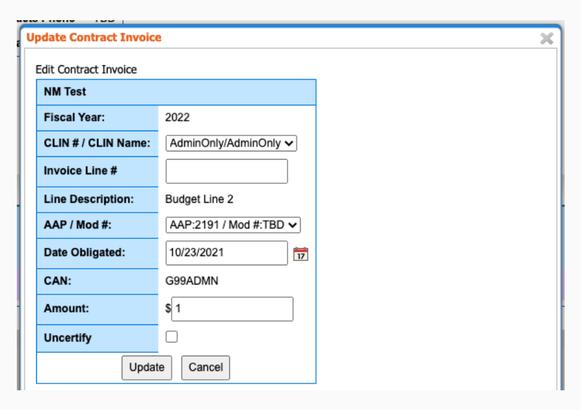
MAPS Edit Budget Line

Description: The pop ups a user sees to **edit a budget line**



Certify Contract Obligation

Certificate Contract Budget
NM Test
CLIN #/CLIN Name: TBD/TBD
Fiscal Year: 2022
Line Description: Budget Line 3
(This should be a short description for reference only, such as OSC 5 or Option Year 6.)
Comments:
Date Needed: 10/31/2021
CAN: G99ADMIN (Admin)
Amount: $ 1
Status: COM
PROC %: 1.25 %
AAP #: 2191
Date Obligated:
Invoice Line #:
Object Class Code: Contracts: 25103
Fee Doc #:
Fee Payment Ref #:
Certified: ☐



Update Contract Invoice

Edit Contract Invoice
NM Test
Fiscal Year: 2022
CLIN # / CLIN Name: AdminOnly/AdminOnly
Invoice Line #:
Line Description: Budget Line 2
AAP / Mod #: AAP:2191 / Mod #:TBD
Date Obligated: 10/23/2021
CAN: G99ADMN
Amount: $ 1
Uncertify ☐

Who uses this?	What for?	When / How often?
Budget Officer	This is a text box…	This is a textbox…

Feedback & Observations

The modals are different depending on which budget line tab you're in when you click "Edit".
- The titles are different and non-intuitive.
- The field's available and the field order is different.

Some budget lines can only be edited from the AAP page.

There's a mix of financial fields and procurement-related fields.

"Edit" is a generic action that doesn't direct the user to the kinds of events/changes they care about.

"Edit" from Post-Award Tracking: Typically to Uncertify, so budget line can be edited to fix a typo. Or if we de-obligate money.

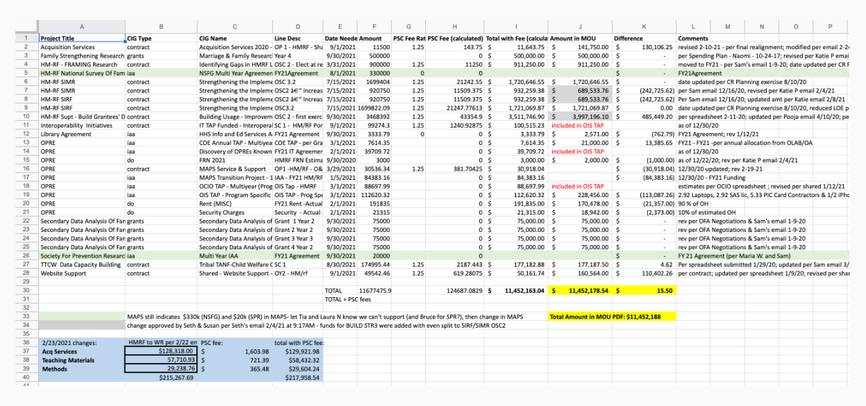
Questions

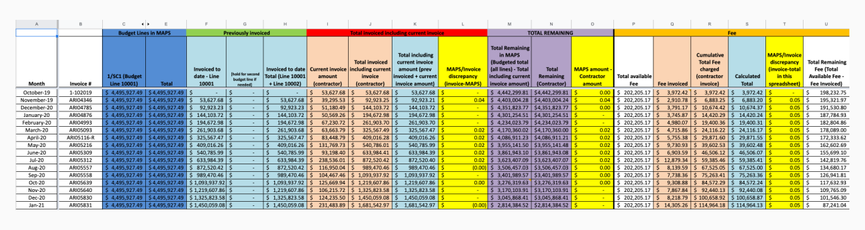
- When / why are you updating budget lines in MAPS (other than status)? — What fields?
- Are there some fields which shouldn't be editable? — Does it depend on the stage?
- Are CORs allowed to edit or delete budget lines?

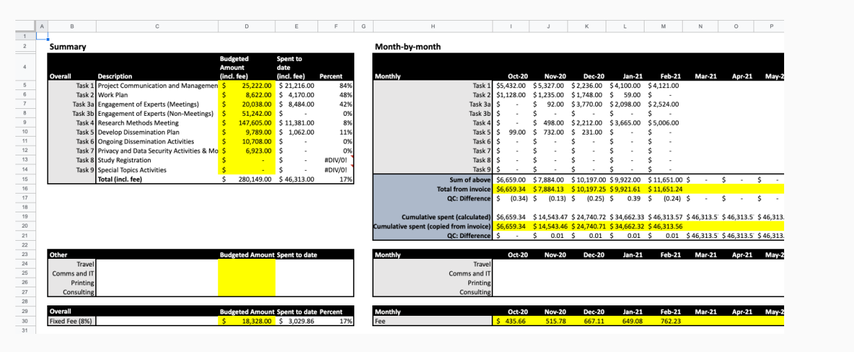
Reporting on a contract

Project Tracker

Description: An example of a spreadsheet that a Project Lead creates to track the budget for their contract







Who uses this?	What for?	When / How often?
This is a textbox…	This is a textbox…	This is a textbox…

Feedback & Observations

This is a textbox…

Questions

MAPS Contract Budget grid

Description: The grid a user can generate to see all the budget lines for all their contracts

Who uses this?	What for?	When / How often?
Budget Officer	This is a textbox…	This is a textbox…
Project Lead	To pull Proc Fee Amounts so they can calculate total budget spend (not just invoices)	

Feedback & Observations

Users find the UI confusing.
- They don't know how to customize the grid and often have to ask for help.
- It is not obvious that there is an expandable panel to select columns.
- The search UI is :(
- Can only sort by one field at a time.

The fields are not organized in any obvious way.
- E.g., CLIN # and CLIN Name are far away from Line Description, despite similarities.
- The fields are in a different order than on the Contract Details page.
- Financial info is interspersed with procurement and admin info.

This is the only place to get Proc Fee Amount for each budget line.

Column names are inconsistent.
- Contract Name is labeled CIG Name.
- POP Starts is Perf Start Date.
- POP Ends is Perf End Date.
- Proc % is Proc Fee Rate.
- Mod Type is Award Action Type.
- Date Obligated is Obl Date.

Some fields are editable.
- You can only tell by clicking on the field and seeing if it changes to edit mode.
- From Invoice Line # onwards.

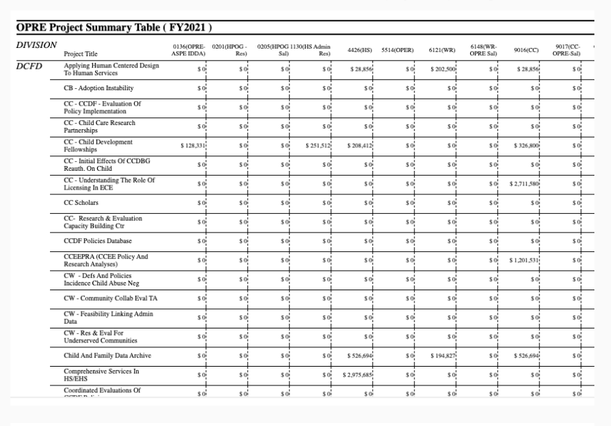
It is possible to bulk update rows.

Questions

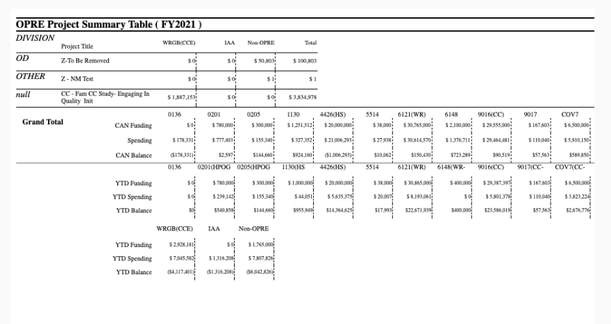
- What are the saved profiles you've had to create for people? — What questions are they designed to answer?
- When do you run this report? — What rows and columns do you care about?
- Who is allowed to edit data here?
- When do you edit data from here? — What fields?
- When do you bulk update data here?

MAPS OPRE Project Summary Table (report)

Description: The report a user can generate to see how much each project is spending from each CAN



OPRE Project Summary Table (FY2021)



OPRE Project Summary Table (FY2021)

Who uses this?	What for?	When / How often?
This is a textbox…	This is a textbox…	This is a textbox…

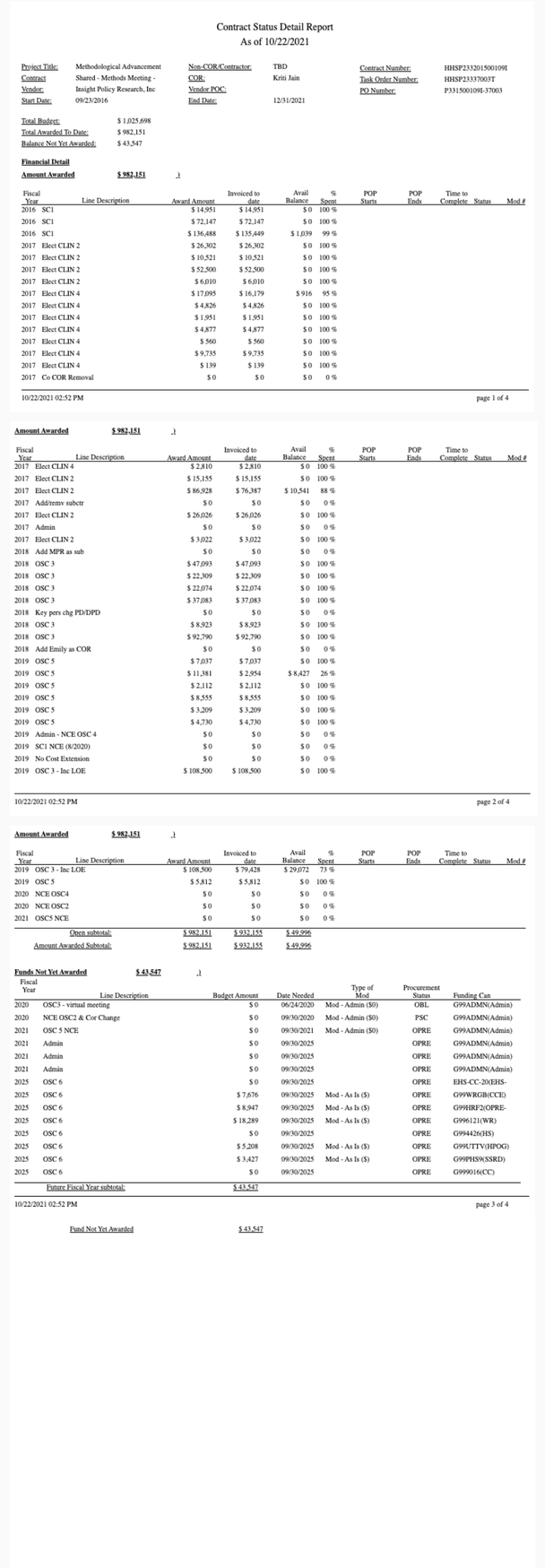
Feedback & Observations

Users run this report for the numbers at the very bottom.
- They have to scroll all the way down to see what they care about.

Users often download the report because it's too small to read on screen.

Questions

MAPS Contract Status Details Report



Contract Status Detail Report
As of 10/22/2021

Project Title: Methodological Advancement
Contract: Shared - Methods Meeting - 2016-2021
Vendor: Insight Policy Research, Inc
Start Date: 09/23/2016
Non-COR/Contractor: TBD
COR: Kriti Jain
End Date: 12/31/2021
Total Budget: $ 1,025,698
Total Awarded To Date: $ 982,151
Balance Not Yet Awarded: $ 43,547

2025 OSC 6 $ 3,427 09/30/2025 Mod - As Is ($) OPRE G99PHS9(SSRD)
2025 OSC 6 $ 0 09/30/2025 OPRE G999016(CC)
Future Fiscal Year subtotal: $ 43,547
10/22/2021 02:52 PM page 3 of 4

Fund Not Yet Awarded $ 43,547

10/22/2021 02:52 PM page 4 of 4

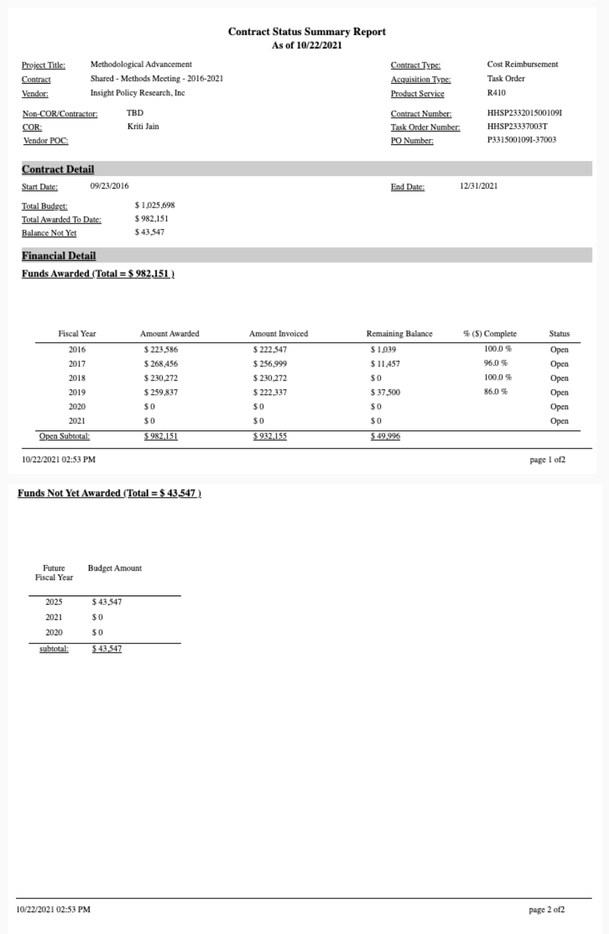
Who uses this?	What for?	When / How often?
This is a textbox…	This is a textbox…	This is a textbox…

Feedback & Observations

Displays key contract info at top.

Shows budget lines broken down by whether funds have been awarded (obligated and certified) or not.
- Focus is on financial info only.
- Includes Award Amount, Invoice to Date, Avail Balance, etc.

Questions



Contract Status Summary Report
As of 10/22/2021

Project Title: Methodological Advancement
Contract: Shared - Methods Meeting - 2016-2021
Vendor: Insight Policy Research, Inc
Non-COR/Contractor: TBD
COR: Kriti Jain
Vendor POC:
Contract Type: Cost Reimbursement
Acquisition Type: Task Order
Product Service: R410
Contract Number: HHSP233201500109I
Task Order Number: HHSP23337003T
PO Number: P331500109I-37003

Contract Detail

Start Date: 09/23/2016
End Date: 12/31/2021
Total Budget: $ 1,025,698
Total Awarded To Date: $ 982,151
Balance Not Yet: $ 43,547

Financial Detail

Funds Awarded (Total = $ 982,151)

Fiscal Year	Amount Awarded	Amount Invoiced	Remaining Balance	% ($) Complete	Status
2016	$ 223,586	$ 222,547	$ 1,039	100.0 %	Open
2017	$ 268,456	$ 256,999	$ 11,457	96.0 %	Open
2018	$ 230,272	$ 230,272	$ 0	100.0 %	Open
2019	$ 259,837	$ 222,337	$ 37,500	86.0 %	Open
2020	$ 0	$ 0	$ 0		Open
2021	$ 0	$ 0	$ 0		Open
Open Subtotal:	$ 982,151	$ 932,155	$ 49,996		

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Funds Not Yet Awarded (Total = $ 43,547)

Future Fiscal Year	Budget Amount
2025	$ 43,547
2021	$ 0
2020	$ 0
subtotal:	$ 43,547

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Who uses this?	What for?	When / How often?
This is a textbox…	This is a textbox…	This is a textbox…

Feedback & Observations

Displays budget by FY.
- Separates awarded from not awarded.
- Displays Amount Awarded, Amount Invoiced, Remaining Balance, etc.

Contract info fields are in a different order than on Contract Status Details Report.

Questions

Hypothesized Solution

General principles

We want to split out workflows and optimize the workflow for the task at hand. In particular, we want to distinguish between budget management tasks and procurement-related tasks.

We want to customize workflows and displays to be appropriate for the user type (i.e., budget officer vs project lead). These different users care about different pieces of data and are trying to complete different tasks.

We want to only display the information relevant for the task at hand. We may want to make additional information available "on demand."

We want to improve how the information if organized to make it easier for a user to understand what the info is about/for (e.g., separating contract/project info from procurement info from vendor info, etc).

Relationship between Projects and Contracts:
Moving forward, OPRE would like for OPS to have a concept of a "project" and a concept of a "contract" different from how these are related in MAPS.

A project in OPS will specify a research description, topics, methods, populations, etc and will be associated with the contract(s) or other agreements implemented to carry out the project work. Usually, this will be a 1:1 relationship, but sometimes a project will have multiple contracts or agreements (e.g., when it's a long-running project with contracts for different years).
- The contract name will match the project name, both of which should match with how OPRE staff reference the work internally and on the OPRE website.
- It would be helpful to be able to link projects that are associated with each other, e.g., through a "related projects" field.
- OPRE would like to not bring the MAPS concept of "project" into OPS.
- In the future, a more robust concept of "portfolio" (i.e., related projects) could be explored.

For more context, click here for notes from OPS Discussion 9/16/21 (responses captured in speaker notes) — Open link

Budget management decisions (to be validated by user testing)

Currently, contracts are added to the system when a Project Lead is planning to initiate a procurement request. A lot of details about the procurement need to be provided at this time (see "New Project (Contract) Template"). However, OPRE staff are tracking more basic information about their spending plans at a much earlier stage, and we are keeping track of this information in individual spreadsheets. This information would be helpful to centralize and share more widely.

With OPS, OPRE would like to be able to add early-stage budget plans into the system so that we have a central record of all the different things we're thinking of spending money on this year. This would be the primary way/point-in-time new contracts get added to the system. This should be a light-weight process.
Key details to provide:
- Identifying info: Contract name, description
- Key roles: Project lead, COR, additional team members
- Budget info: Budget lines, descriptions, anticipated amounts, anticipated dates

Both Project Leads and the Budget Team should be able to add this data and update it as plans change and settle. If the Project Lead is inputting the data, the Budget Team should have a way to either approve the inputs before they're accepted or be notified when changes are made (to be further explored with OPRE).

Procurement-related workflows would be covered by future work, but the expectation is that at the time that we want to initiate a procurement request, we would edit/select a contract that was created above and provide the necessary proc-related information to initiate a requisition and secure approvals (as well as update the budget plan if it's changed).

Even if procurement-related workflows are happening outside of OPS, the Budget Team needs to be able to update the status of budget lines as the contract moves through the procurement process. The statuses we care about:
- In planning (OPRE needs to take action to initiate procurement)
- In procurement (requisition has been sent to the procurement shop)
- Committed (requisition is finalized)
- Obligated (funds have been committed)
- Obligated and Certified (funds can be invoiced against)

OPRE needs to see spending plan totals at the contract level (e.g., total amount on the contract, total this FY, total future FYs, etc) -- to be further explored with OPRE.

OPRE needs to see these spending plans reflected in the associated CANs, and we need to see the status of these plans/budget lines update as the contract moves into and completes procurement.
- TBD: Should "committed" budget lines roll up to "In procurement" or "Obligated" on the CAN-level spending plan?

Interactions with other modules:
Fees, shared costs, procurement-related workflows, invoice-related workflows, and project-catalog-related workflows would be covered by future work.

User Stories

As a Project Lead, CAN Lead, Division Director, or OPRE Admin, I need to view a list of all the contracts I'm responsible for so that I can manage them.
- I need to easily see relevant and identifying information about the contract, with the option to view additional details as needed. ➡ View list of contracts
- I need to easily see the actions I can take on the contract.
- I need to group and/or sort my contracts to organize them (e.g., by status, Project Lead, division, etc).
- I need to filter and/or search my contracts to find the ones of interest.
- I don't want inactive/ended contracts to clutter my view, but I want to retain access to them on an as-needed basis.

How do I navigate here? — What info do I want to see about them? — What contracts do I want to see?

As a Project Lead, CAN Lead, Division Director, or OPRE Admin, I need to see a contract's budget breakdown so that I can make appropriate spending plans.
- I need to see the budget for a single contract broken down by contract line items and the CANs that will pay for them. ➡ View a contract — View budget lines
  - TBD (maybe later, maybe not at all): I want to see the budget for a single contract broken down by task (more granular the the contract line item).
- I need to see the budget for a single contract broken down by status (e.g., planned vs committed vs obligated vs paid out). (Note: "paid out" will be tackled as part of Invoices and Fees & Shared Costs.) ➡ View a contract — View budget lines
  - As a Project Lead, I need new contracts I'm planning entered into the system so that I can track planned spending. (Form to request a contract be created? Or is there some data creation they can do independently?) ➡ Create a contract — Create budget lines
  - As a Project Lead, I need to view a contract and easily see what funds are committed or obligated so that I know what money is already spoken for.
  - As a Project Lead, I need to view a contract and easily see what funds are allowed to be invoiced against so that I know what is available to spend.
- As a manager, I need access to all the same views and functionality as my staff so that I can help support them, answer questions, and fill in for them as needed.
- As a Budget Officer, I need to be sure financial info on the contract was entered correctly. ➡ Create a contract — Create budget lines
- As a Budget Officer, I need to update a contract as more information is known about the award and/or as budget statuses change so that Project Leads don't have to go into [HSS system of record] for this info. ➡ Edit a contract — Edit budget lines

How do I navigate here?

As a CAN Lead, Division Director, or OPRE Admin, I need to see how contracts affect my CAN budget so that I can make appropriate spending plans.
- As a CAN Lead or Division Director, I need to view a CAN and see how the budget breaks down by status and/or by contract. ➡ View a CAN
- As a CAN Lead or Division Director, I need to view my list of CANs and see how the budget breaks down by status and/or by contract. ➡ View a list of CANs
- As an OPRE Admin, I need to view a list of all CANs (the budget for all of OPRE) and see how the budget breaks down by status and/or by contract. ➡ View a list of CANs
- As a manager, I need access to all the same views and functionality of my staff so that I can help support them, answer questions, and fill in for them as needed.

Some now, some later: As a Budget Officer, I need to ensure that contract info in our system is in sync with HSS systems so that finances are processed appropriately.
- As a Budget Officer, I need to pull a list of contracts that I need to input/update in other HSS systems, and I need the list to include information that helps me input/identify the contracts in those systems.
  - As a Budget Officer, I need to track what data I need to pull from our system about the contract and push into [HSS systems] and whether I've made the necessary updates.
- As a Budget Officer, I need to pull a list of contracts that I need to get updates for from other HSS systems, and I need the list to include information that helps me identify the contracts in those systems.
  - As a Budget Officer, I need to track what data I need to pull from HSS systems about the contract and push into our system and whether I've made the necessary updates.

How do I navigate here? — What info do I need to pull and push, at what times? — What contracts do I want to see, at what times?

Later: As a Budget Officer, I need to know what procurement actions are being planned so I can initiate the procurement process in [HHS system of record].
- As a Project Lead, I need new contracts I'm planning entered into the system so that I can indicate my planned procurement actions. (Form to request a contract be created?)

Needs research: Do contracts ever need to be deleted or inactivated? When/why? Soft delete or hard delete?

Needs research: As a Project Lead, I need to see what changes have been made to my contract in the past X days/weeks/months. (Why?)

Data Migration / Backfilling Plan

OPS Field Name	OPS Table	Description	Example	MAPS Field Name	MAPS Table	Transformation(s)	Comments