



**Financial Planning & Analysis Process**  
**Phase I Budget Development for FY 2025**  
Office of Financial Planning & Analysis, UFS&T

# Session Objectives

- ❖ Multi-Year Financial Planning & Analysis
- ❖ Collaborative and Transparent Approach
- ❖ Building Teams and Industry Best Practices
- ❖ FY 2025 Budget Projections & Assumptions
- ❖ Assumptions & Projections – Checklist & Training
- ❖ Running Workday Reports for Analysis
- ❖ Budget Requests – Checklist & Training



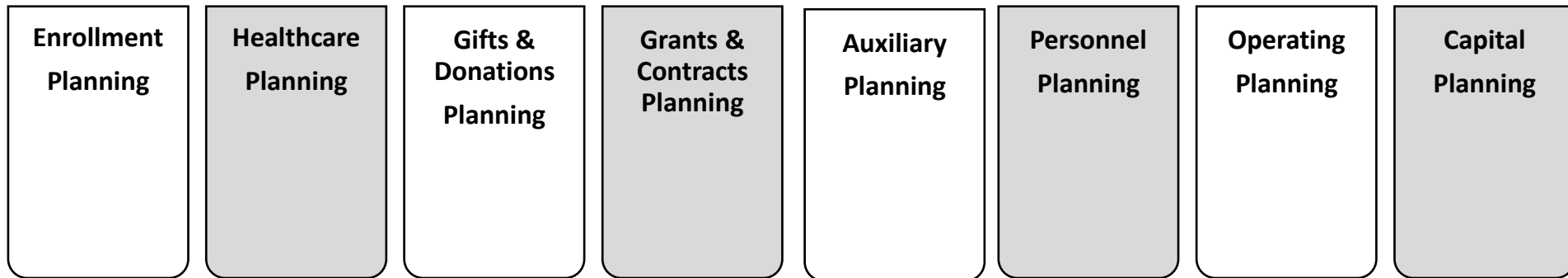
# Multi-Year Financial Planning and Analysis



**Short-Range Planning:** Forecasting revenues and expenditures over a short-term period, usually within one to two years. Rolling forecasts and upcoming year plans are common tools to use for short-range planning to assist in solving immediate problems and developing strategies that will lead to results.

**Long-Range Planning:** Projecting revenues and expenditures over a long-term period, usually extends out three years or more, depending on the nature of the project. Long-Range plans and scenario analysis are common tools used for strategic planning and goal seeking. Typically requires using assumptions about economic/organization conditions, future scenarios, and other variables.

# Collaborative & Transparent Approach



- **Collaboration and Transparency**
  - ✓ Working collaboratively within cross-functional teams will provide transparency and assist with strategically identifying and prioritizing financial resources and needs (both revenues and expenditures).

# Building Teams & Using Industry Best Practice Analytics

## Collaborative Review of Industry Best Practice Financial Reports & Metrics

- ✓ College of Osteopathic Medicine
- ✓ College of Pharmacy
- ✓ College of Veterinary Medicine
- ✓ College of Dental Medicine
- ✓ College of Optometry
- ✓ College of Podiatric Medicine
- Other Colleges
- ✓ University Student Affairs
- ✓ Research
- ✓ Library
- ✓ Security
- ✓ Facilities
- ✓ Patient Care Operations
- Other Shared Services



Using Data, Analytics and Strategic Goals for Decision Making Consideration



**FYE23 Budget vs Actual  
Analysis**

**FYE 2017 to FYE 2023 Multi-Year Historical Trend  
Analysis**

**Goal & Target Oriented  
Plans & Projections**

# Building Teams & Using Industry Best Practice Analytics

Navigation bar with icons for home, save, print, edit, user, refresh, download, and search.

Level Other Units (Division) Fund 1100 - Current Unrestricted Period Jun-2023

Accounts	Year to date as of Jun-2023			
	Adjusted Budget	Actuals	Variance (\$)	Variance (%)
<b>Operating Expenses</b>				
▶ Commencement, Convocation & Other Student Activities	424,000	594,786	(170,786)	
▶ Conference, Continuing Education, Faculty Dev, & Travel	-	5,568	(5,568)	
▶ Miscellaneous	15,000	13,871	1,129	
▶ Parking, Rents, Equipment Leases, & Property Assessment	-	7,708	(7,708)	
▶ Postage	-	564	(564)	
▶ Repairs and Maintenance & Supplies	-	480	(480)	
▶ Software Licenses	283,204	-	283,204	
▶ Supplies	35,000	37	34,963	
▶ Telecommunications	-	928	(928)	
<b>Total Operating Expenses</b>	<b>757,204</b>	<b>623,942</b>	<b>133,262</b>	

Navigation bar with icons for home, save, print, edit, user, refresh, download, search, and help.

Level Other Units (Division) Fund 1100 - Current Unrestricted

Accounts	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals
▶ Advertising, Marketing, Promotion, & Sponsorships	-	2,652	3,066	9,266	1,500	267	-
▶ Banking & Investment Fees	-	-	-	30	10	-	-
▶ Commencement, Convocation & Other Student Activities	641,586	717,210	736,686	494,132	297,376	620,476	594,786
▶ Conference, Continuing Education, Faculty Dev, & Travel	11,205	22,127	148,976	61,960	6,872	842	5,568
▶ Contracts & Consulting Services	-	162,091	49,397	39,645	54,566	25,636	-
▶ Dues, Memberships, Fees, & Licenses	899	773	13,747	2,998	4,298	-	-

# Building Teams & Using Industry Best Practice Analytics

## Additional Reports Available

Western University | Western University of Health Sciences | Home

### Reports

[Add New](#) | Search

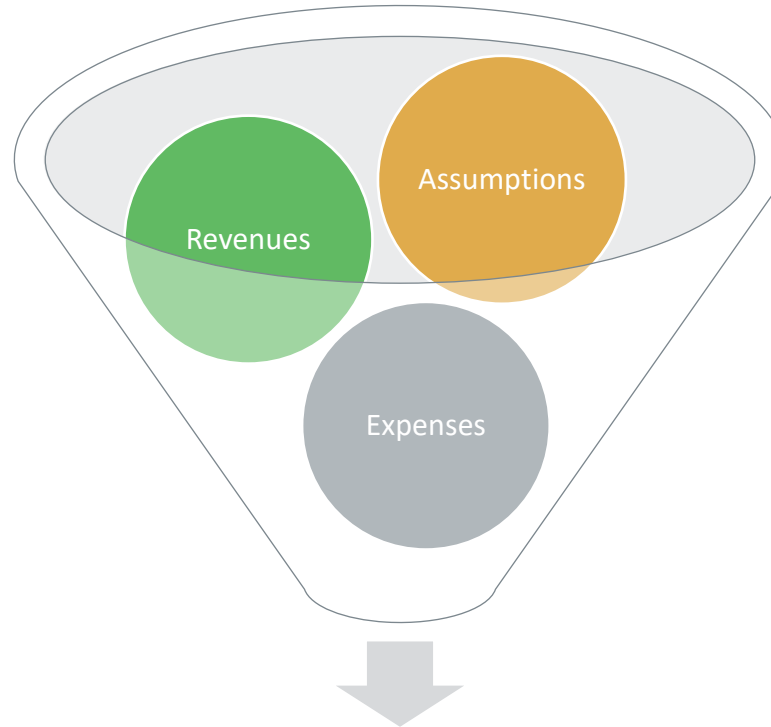
	Name	Output
<input type="checkbox"/>	1. YTD YOY Comparison (Actuals)	HTML
<input type="checkbox"/>	2. Quarter YOY Comparison (Actuals)	HTML
<input type="checkbox"/>	3. Month YOY Comparison (Actuals)	HTML
<input type="checkbox"/>	4. Yearly Trend (FY17-FY23 Actuals)	HTML
<input type="checkbox"/>	5. Quarterly Trend (Actuals)	HTML
<input type="checkbox"/>	6. Monthly Trend (Actuals)	HTML
<input type="checkbox"/>	7. Budget Vs Actual (FY23)	HTML
<input type="checkbox"/>	8. Budget Vs Actual (FY24 YTD)	HTML

Navigation: All, Personal, Shared, Favorites, Reusable

# FY 2025 Budget Projections and Assumptions

## Revenues

- Tuition
- Patient Care
- Gifts & Donations
- Grants & Contracts
- Auxiliary
- Other



## Expenses

- Compensation
- Operating (OpEx)
- Capital (CapEx)

**FY 2025 Budget Projection &  
Pre-Planning for Multi-Year Projections**








# Assumptions & Projections Checklist

**Due: November 27<sup>th</sup>, 2023**

- Proposed Tuition Rate Assumption - Workday 
- Proposed Salary Pool Rate Assumption - Workday 

**Due: December 4<sup>th</sup>, 2023**

- Enrollment Projections - Excel 
- Gifts & Donations Projections - Excel 
- Grants & Contracts Projections - Excel 
- Patient Care Revenue Projections - Workday 
- Auxiliary Services Projections - Workday 

# Additional Planning Training Sessions

Please note individualized planning training sessions will be provided for:

- Enrollment Projections - Excel
- Gifts & Donations Projections - Excel
- Grants & Contracts Projections - Excel
- Patient Care Revenue Projections – Workday
- Auxiliary Services - Workday

Additional communication(s) will be provided via e-mail, if a project pertains to your area of specialty. All Excel planning sheets will be saved in the W Drive for completion.

# Accessing Workday

Via: <https://my.westernu.edu/>

The dashboard contains the following tiles:

- Self-Service BanWeb**: Features an illustration of a laptop with 'BANWEB' on the screen, a potted plant, and a mug.
- Workday**: Displays the Workday logo (a blue 'W' with an orange arch above it).
- University Risk Management**: Includes an illustration of people and a text description: "The Office of Risk Management ensures to protect of the physical, human resources, and financial assets of the University while reducing exposure to accident loss before it occurs. It has the responsibility of carrying out the policies of the University in systems."
- Services**: Lists links for Facilities Service Request, Notary Services, Skill Share, IT Support, and Space Planning & Management.
- Employee Resources**: Lists various HR-related links such as 2023 Hourly Payroll Calendar, 2023 Salary Payroll Calendar, ADP - Time Card/Reporting, Phone Directory, Discounts, Employee Assistance Program, Employee Benefits Resource Center, Employee Evaluations, Employee Handbook, Employee Policies, Employee Self-Service Profile\*, Faculty Handbook, and Forms\*.
- Application Systems**: Lists various software applications including Concur, Elxir, Google Docs, LinkedIn Learning, My Mediasite, Office 365, Qualtrics, Resource Scheduler, Self Service BanWeb, SharePoint, and Workday. The Workday link is highlighted with a yellow arrow labeled 'S1'.

Directly: <https://login.adaptiveinsights.com/app>

The login page features the following elements:

- Username or Email \***: A text input field highlighted with a yellow arrow labeled 'S1'.
- Password \***: A text input field with a yellow box containing the text "Leave password blank. SSO connected."
- Sign In**: A blue button highlighted with a yellow arrow labeled 'S2'.
- Forgot Password**: A link below the Sign In button.
- Workday Logo**: A large blue 'W' with an orange arch above it, set against a blue background.
- WORKDAY ADAPTIVE PLANNING**: Text below the logo.
- Footer**: "© 2022 Workday, Inc. All rights reserved. Proprietary and Confidential" and "Workday is powered by 100% renewable energy."

# Accessing Workday Processes Tasks

The screenshot shows the Workday interface for the 'Multi-Year Planning' process. The left sidebar contains navigation options: Home, Sheets, Reports, Dashboards, Announcements, Processes, and Support. The 'Processes' menu item is highlighted with a yellow box and an arrow labeled 'S2'. The 'Overview' sub-menu item is also highlighted with a yellow box and an arrow labeled 'S3'. The main content area displays the 'Multi-Year Planning' process overview, including a progress indicator showing 0 tasks completed and 2% overall progress. A list of tasks in progress is shown, all marked as 'Incomplete'. The 'Tasks Completed' section is empty, displaying 'There are no completed tasks'.

**S1** → [Menu Icon]

Western University | Western University of Health Sciences | Processes / Overview

Assigned to: Me | Process: Multi-Year Planning

Overall progress: 2%

- 2 tasks completed
- 82 tasks in progress
- 3 tasks running late

Tasks in Progress

- Top 5 Budget Request - Academic (FY25)**  
Due Nov 27, 2023 3:15 PM PST | Incomplete
- Proposed Salary Pool - Academic (FY25)**  
Due Nov 27, 2023 3:16 PM PST | Incomplete
- Proposed Tuition Rate (FY25)**  
Due Nov 27, 2023 3:17 PM PST | Incomplete
- Top 5 Budget Request - Healthcare (FY25)**  
Due Nov 27, 2023 3:19 PM PST | Incomplete
- Healthcare Revenue Projections (FY25-FY27)**  
Due Dec 1, 2023 5:00 PM PST | Incomplete

Tasks Completed

There are no completed tasks

# Tasks Dashboard

Western University | Western University of Health Sciences | Processes / Overview

Assigned to: Me | Process: Multi-Year Planning

Days to target: 0  
Process target date: Nov 22, 2021 5:00 PM PST  
Final task due date: Dec 1, 2023 5:00 PM PST

0 days before target  
694 days since start

Overall progress: 1%

- 2 tasks completed
- 101 tasks in progress
- 5 tasks running late

Go to Process Guide →

Tasks Running Late: There are no overdue tasks

Tasks in Progress:

- Top 5 Budget Request - Academic (FY25)  
Due Nov 27, 2023 3:15 PM PST  
Incomplete
- Proposed Salary Pool - Academic (FY25)  
Due Nov 27, 2023 3:16 PM PST  
Incomplete
- Proposed Tuition Rate (FY25)  
Due Nov 27, 2023 3:17 PM PST  
Incomplete
- Top 5 Budget Request - Healthcare (FY25)  
Due Nov 27, 2023 3:19 PM PST  
Incomplete
- Healthcare Revenue Projections (FY25-FY27)  
Due Dec 1, 2023 5:00 PM PST  
Incomplete

Tasks Completed: There are no completed tasks

**S1:** Select me, so that you are only able to view your tasks.

**S2:** Complete all tasks listed under “Tasks in Progress” by due date specified.

**S3:** To access each task, you will have to click on the [title link](#), and it will take you directly to the sheet required to be completed.

**Note:** To go back to task dashboard to view all tasks, you will have to go back to processes from menu bar, as shown on previous slide.

# Proposed Tuition Rate Assumption - Training

Multi-Year Planning Nov 22

Top 5 Budget Request - A... Nov 27

Proposed Salary Pool - Ac... Nov 27

**Proposed Tuition Rate (FY... Nov 27**

Description Notes

Content Proposed Tuition Rate FY25

Version FY2025 Phase I Budget Request

On the sheet, please select your home org. Please input FY25 Proposed Tuition % Adjustment and complete the Short rationale/ justification field as well. All fields are required to be completed. If you need to add/ modify education program, please contact fp&a@westernu.edu.

#	EDUCATIONAL PROGR...	STUDENT YE...	FY24 TUITION RATE	FY25 PROPOSED TUITION % ADJUSTMENT	FY25 NEW TUITION RATE	SHORT RATIONALE/JUSTIFICATION
1	P	1				

Showing rows 1-1 of 1.

**S1:** Select home level (Org) to view college programs

**S2:** Click on FY25 Proposed Tuition % Adjustment entry cell and make your entry

**S3:** Click on Short Rationale/Justification entry cell and make your entry

**S4:** Click Save icon

# Proposed Salary Pool Assumption - Training

Western University of Health Sciences | Sheets / Proposed Salary Pool Allocation FY25 | FY2025 Phase I Budget Request

Multi-Year Planning | Nov 22

Top 5 Budget Request - A... | Nov 27

Proposed Salary Pool - Ac... | Nov 27

Description | Notes

Content Proposed Salary Pool Allocation FY25  
Version FY2025 Phase I Budget Request

On the sheet, please select your home org. Please input FY25 Proposed Salary Pool Allocation % and complete the Short Rationale/Justification field as well. All fields are required to be completed.

#	FY25 PROPOSED SALARY POOL ALLOCATION %	SHORT RATIONALE/JUSTIFICATION

Showing rows 0 of 0.

**S1:** Select home level (Org) for entry

**S2:** Click Add Row icon

**S3:** Click on FY25 Proposed Salary Pool Allocation % entry cell and make your entry

**S4:** Click on Short Rationale/Justification entry cell and make your entry

**S5:** Click Save icon

# Completing Task(s) Status - Training





The image illustrates a workflow for updating task status. On the left, a 'Tasks in Progress' list contains five items, all with an 'Incomplete' status. Two yellow arrows labeled 'S1' point to the 'Incomplete' buttons for 'Proposed Salary Pool - Academic (FY25)' and 'Proposed Tuition Rate (FY25)'. A large red arrow points to the right, where the 'Tasks in Progress' list now shows three items, all still 'Incomplete'. The 'Proposed Salary Pool - Academic (FY25)' and 'Proposed Tuition Rate (FY25)' items now have their 'Complete' buttons highlighted in yellow. The 'Tasks Completed' section on the right now contains two items, both with a 'Complete' status, indicating that the status change was successful.

**S1:** Once you have completed your task(s), go to process menu bar. Click Incomplete Status and the status will change to complete.



# Budget Requests - Checklist

**Due: November 27<sup>th</sup>, 2023**

- Promotions Requests 
- FY23 Budget vs Actual & FY17-FY23 Multi Year Trend Analysis  
- Top 5 Requests 

# Promotion Requests - Training

**Instructions:**

Please provide the department promotion increase requests. Complete 1 worksheet per ORG, do not combine positions from different ORGs on the worksheet. Please provide the source of funding, (e.g. the PCN) if applying department funds towards the promotion amount. If approved, a PeopleAdmin action form will need to be generated for processing the promotion.

Position Control Number	Current Account Number	New Account Number	Employee Name	Current Title	New Title	Current FTE	New FTE	Base Salary/Wage Level	Department Funding Amount	Department Funding Source (List PCN/Other Line)	Amount Requested from Priority Pool 7	Amount of Total Increase	Total % Increase	2024-25 Proposed Salary Wage Level	Rationale/Justification
999777	6600	6200	Smith, Sam	Associate Buyer	Lead Buyer	1.000	1.000	65,000.00	2,500.00	Vacant PCN 999222	2,500.00	5,000.00	7.69%	70,000.00	Employee is being promoted from Associate Buyer to Lead Buyer due to an increase in responsibilities.
												-		-	
												-		-	
												-		-	
												-		-	
												-		-	
												-		-	
												-		-	
												-		-	
												-		-	
												-		-	

Salaries and Wages	\$ 2,500.00
Fringe Benefits	<u>830.00</u>
Salaries, Wages, and Fringe Benefits	<u>\$ 3,330.00</u>

Completed by: \_\_\_\_\_  
Title: \_\_\_\_\_

Org Number: \_\_\_\_\_  
Date: \_\_\_\_\_

1. Access Proposed Promotion Funding Request Form from: W:\Budget Office\Your Department\SALARIES.
2. Please complete form. Above you will find a listed example to reference.
3. Once completed, save in W Drive.

# Phase I Budgetary Requests


During Phase I Budget Development Process you will be able to request your **top 5 funding needs** based on the reports, plans/projections, and analysis you completed. We ask that you evaluate your budget to identify any possibilities for reallocation (self-funding) prior to requesting funds.

Furthermore, we will be requiring a budget vs actual for FYE 23 and a FYE 17 to FYE 23 historical trend as part of the justification/rationale. Historical deficits **need to be included** as part of the request. Kindly narrow down your deficits to 1 to 3 culprit accounts causing overall budget overages. Do not include every single account. We will continue coordinating meetings to collaboratively review deficit accounts.

**Note:** Each college will be able to input up to 5 requests for college activity and up to 5 requests for patient care center activity.











# Running Workday Reports for Analysis - Training

S1 →  Western University | Western University of Health Sciences | Home

S2 → **Reports**

Name	Output	Location
<input type="checkbox"/> 1. YTD YOY Comparison (Act...	HTML	Shared
<input type="checkbox"/> 2. Quarter YOY Comparison (...	HTML	Shared
<input type="checkbox"/> 3. Month YOY Comparison (A...	HTML	Shared
<input type="checkbox"/> 4. Yearly Trend (FY17-FY23 A...	HTML	Shared
<input type="checkbox"/> 5. Quarterly Trend (Actuals)	HTML	Shared
<input type="checkbox"/> 6. Monthly Trend (Actuals)	HTML	Shared
<input type="checkbox"/> 7. Budget Vs Actual (FY23)	HTML	Shared
<input type="checkbox"/> 8. Budget Vs Actual (FY24 YT...	HTML	Shared

# Running Reports for Analysis - Training

Name	Output	Location
<input type="checkbox"/>  1. YTD YOY Comparison (Act...	HTML	Shared
<input type="checkbox"/>  2. Quarter YOY Comparison (...)	HTML	Shared
<input type="checkbox"/>  3. Month YOY Comparison (A...	HTML	Shared
<input type="checkbox"/>  <b>S1</b> 4. Yearly Trend (FY17-FY23 A...	HTML	Shared
<input type="checkbox"/>  5. Quarterly Trend (Actuals)	HTML	Shared
<input type="checkbox"/>  6. Monthly Trend (Actuals)	HTML	Shared
<input type="checkbox"/>  <b>S1</b> 7. Budget Vs Actual (FY23)	HTML	Shared
<input type="checkbox"/>  8. Budget Vs Actual (FY24 YT...	HTML	Shared

## Select Prompting Parameters

### 7. Budget Vs Actual (FY23)

Level

Other Units (Division) ▼

Fund

1100 - Current Unrestricted ▼

Period

Jun-2023 ▼

Run Report

Cancel

**S1:** Click each report link. Select your College/Department Rollup Level and Operating Fund 1100 within the Parameters. Click Run Report.

# Running Reports for Analysis - Training

1. Identify Historical Deficits
2. Identify Anticipated Needs

Western University | Reports / 7. Budget Vs Actual (FY23)

Level Other Units (Division) Fund 1100 - Current Unrestricted Period

Accounts	Year to date as of Jun-2023		
	Adjusted Budget	Actuals	Variance (\$)
Operating Expenses			
▶ Commencement, Convocation & Other Student Activities	424,000	594,786	(170,786)
▶ Conference, Continuing Education, Faculty Dev, & Travel	-	5,568	(5,568)

Western University | Reports / 4. Yearly Trend (FY17-FY23 Actuals)

Level Other Units (Division) Fund 1100 - Current Unrestricted

Accounts	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023
	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals
▶ Advertising, Marketing, Promotion, & Sponsorships	-	2,652	3,066	9,266	1,500	267	-
▶ Banking & Investment Fees	-	-	-	30	10	-	-
▶ Commencement, Convocation & Other Student Activities	641,586	717,210	736,686	494,132	297,376	620,476	594,786
▶ Conference, Continuing Education, Faculty Dev, & Travel	11,205	22,127	148,976	61,960	6,872	842	5,568
▶ Contracts & Consulting Services	-	162,091	49,397	39,645	54,566	25,636	-
▶ Dues, Memberships, Fees, & Licenses	899	773	13,747	2,998	4,298	-	-

S1: Click Download Icon and download version to save a copy for yourself.

The reports are a requirement for Phase 1 Budget Request Process. We will collaborate on saving a final PDF copy in the W Drive.

# Accessing Workday Tasks

The screenshot illustrates the navigation path to access Workday tasks. It features a left-hand navigation menu and a main content area. Three yellow arrows with labels S1, S2, and S3 indicate the steps:

- S1:** Points to the hamburger menu icon in the top left corner.
- S2:** Points to the 'Processes' menu item in the left navigation bar.
- S3:** Points to the 'Overview' sub-menu item under 'Processes'.

The main content area displays the 'Multi-Year Planning' process overview. It includes a summary card with the following information:

- Assigned to: Me
- Process: Multi-Year Planning
- Overall progress: 2%
- 0 tasks completed (represented by a large '0' in a circle)
- 82 tasks in progress
- 3 tasks running late

Below the summary card, there are two columns: 'Tasks in Progress' and 'Tasks Completed'. The 'Tasks in Progress' column lists five tasks, all marked as 'Incomplete':

- Top 5 Budget Request - Academic (FY25) - Due Nov 27, 2023 3:15 PM PST
- Proposed Salary Pool - Academic (FY25) - Due Nov 27, 2023 3:16 PM PST
- Proposed Tuition Rate (FY25) - Due Nov 27, 2023 3:17 PM PST
- Top 5 Budget Request - Healthcare (FY25) - Due Nov 27, 2023 3:19 PM PST
- Healthcare Revenue Projections (FY25-FY27) - Due Dec 1, 2023 5:00 PM PST

The 'Tasks Completed' column shows a message: 'There are no completed tasks'.

# Tasks Dashboard

The screenshot shows the 'Tasks Dashboard' for 'Multi-Year Planning' at Western University. The dashboard includes a header with the university logo and navigation links. A dropdown menu is set to 'Assigned to Me'. Key metrics include 'Days to target: 0', 'Process target date: Nov 22, 2021 5:00 PM PST', and 'Final task due date: Dec 1, 2023 5:00 PM PST'. A large blue circle displays '0' days to target. A progress indicator shows 'Overall progress: 1%' with a donut chart. A list of tasks is shown, including 'Top 5 Budget Request - Academic (FY25)', 'Proposed Salary Pool - Academic (FY25)', 'Proposed Tuition Rate (FY25)', 'Top 5 Budget Request - Healthcare (FY25)', and 'Healthcare Revenue Projections (FY25-FY27)'. All tasks are marked as 'Incomplete'. Annotations S1, S2, and S3 point to the 'Assigned to Me' dropdown, the 'Tasks in Progress' section, and the 'Top 5 Budget Request - Healthcare (FY25)' task link, respectively.

**S1:** Select me, so that you are only able to view your tasks.

**S2:** Complete all tasks listed under “Tasks in Process” by due date specified.

**S3:** To access each task, you will have to click on the [title link](#), and it will take you directly to the sheet required to be completed.

**Note:** To go back to task dashboard to view all tasks, you will have to go back to process from menu bar, as shown on previous slide.



# Top 5 Budget Request Training

Western University of Health Sciences | Sheets / Phase I - Budget Request | FY2025 Phase I Budget Request

Multi-Year Planning Nov 22

Top 5 Budget Request - A... Nov 27

Description Notes

Content Phase I - Budget Request

Version FY2025 Phase I Budget Request

On the sheet, please select the org you will be making the request. Please make selection/ input your data for each column. All fields are required to be completed.

S5 S2 S1 Levels

#	GL ACCO...	REQUEST AMO...	EFFECTIVE DATE	PRIORITY RANKING	PREVIOUS HISTORICAL DEFICIT	FUNDING TY...	SHORT RATIONALE/JUSTIFICATION
1	7160 - Utiliti...	30,000.00	7/1/2024	1 - highest level	Yes	Ongoing	Utilities have gone up for the past 3 yea...
2	70960 - Rot...	25,000.00	12/1/2024	2 - second highest le...	Yes	Ongoing	Rotation prices increased since FY2021.
3	7920 - Equip...	50,000.00	7/1/2024	3 - middle level	No	One-time	New surgical equipment for patient car...
4	70970 - Rep...	5,000.00	7/1/2024	4 - second lowest lev...	No	Ongoing	New repairs and maintenance contract ...
5	72000 - COGS	50,000.00	7/1/2024	5 - lowest level	Yes	Ongoing	COGS exceeds recurring revenue levels.
6	<b>Total</b>	<b>160,000.00</b>					

Showing rows 1-5 of 5.

**S1:** Select the org level you will be requesting funding.

**S2:** Click Add Row icon for each entry.

**S3:** Complete each cell for each row by entering information accordingly.

**S4:** Repeat Steps 1 to 3 for up to 5 requests for your department or college.

**S5:** Click Save icon

**Note:** You may use multiple orgs as long as the total number of items is no greater than 5 for your college/department. You will be able to request 5 items for the academic and 5 items for patient care center. Please save all request backup information in the W Drive folder (quotes, additional rationale/justification, etc.).

# Completing Tasks Status - Training

The image displays a side-by-side comparison of a task management interface. On the left, under 'Tasks in Progress', five tasks are listed, each with an 'Incomplete' status button highlighted in yellow. A yellow arrow labeled 'S1' points to the first 'Incomplete' button. The 'Tasks Completed' section on the left is empty, showing 'There are no completed tasks'. On the right, the same five tasks are shown, but the first two are now in the 'Tasks Completed' section with 'Complete' status buttons highlighted in yellow. A large dark red arrow points from the left panel to the right panel, indicating the transition.

Task Name	Due Date	Current Status	Target Status
Top 5 Budget Request - Academic (FY25)	Due Nov 27, 2023 3:15 PM PST	Incomplete	Complete
Proposed Salary Pool - Academic (FY25)	Due Nov 27, 2023 3:16 PM PST	Incomplete	Incomplete
Proposed Tuition Rate (FY25)	Due Nov 27, 2023 3:17 PM PST	Incomplete	Incomplete
Top 5 Budget Request - Healthcare (FY25)	Due Nov 27, 2023 3:19 PM PST	Incomplete	Incomplete
Healthcare Revenue Projections (FY25-FY27)	Due Dec 1, 2023 5:00 PM PST	Incomplete	Complete

**S1:** Once you have completed your task(s), go to process menu bar. Click Incomplete Status and the status will change to complete.

# Support Team

Team Member	Focus Area	Contact Method
Raymond Garcia, MBA	Process Information, Metrics, Targets, Scenario Analysis, and Rebalancing	Teams or E-mail at garciar@westernu.edu
Yutong Li, MS and CPA	Multi-Year Enrollment Planning, Tuition Planning, and Workday Administrator	Teams or E-mail at yutongli@westernu.edu
Miguel Hernandez, MBA	Healthcare Services Revenue Planning & Auxiliary Services Revenue Planning	Teams or E-mail at miguelhernandez@westernu.edu
Alan Cho, MS	Budget Requests	Teams or E-mail at alancho@westernu.edu
Monique Cano	Personnel (Compensation) Planning	Teams or E-mail at mcano@westernu.edu
Maria Nguyen	Financial Reporting	Teams or E-mail at marianguyen@westernu.edu





**Thank  
you**