## **PCC Rolling Forecast & Revenue Projection**

**Overview:** The following document contains instructions on how to create a revenue rolling forecast for the current fiscal year (by month) and projections for the upcoming fiscal years. The rolling forecast, once developed, should reflect the anticipated revenues and discounts/allowances for forward looking years. Please note historical data (actuals) will populate for previous years to assist you with your analysis. We recommend that both quantitative and qualitative information be used on rolling forecast for current fiscal year and upcoming fiscal years. For additional information and/or help please reach out to the Office of Financial Planning and Analysis at fp&a@westernu.edu.

**Software Background:** Workday Adaptive Insights is a recognized Leader in the Gartner 2021 Magic Quadrant for Cloud Financial Planning and Analysis Solutions based on its ability to execute and completeness of vision. The following graphic illustration shows four financial planning and analysis quadrants that Workday Adaptive Insights and the Office of Financial Planning and Analysis will be able to aid.



#### Sections:



Step 1: Go to www.adaptiveplanning.com to log in.



Step 2: Login with your username and leave the password blank.

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WORKDAY ADAPTIVE PLANNING

**Step 3:** If you are not automatically redirected to the **Processes** > **Overview** landing page after logging in, click on the menu icon on the top left to bring up the Workday navigation menu.

Grand Western University     Western University of Health Sciences     Home	0
Welcome to Workday Adaptive Planning	

#### Step 4: Click on Processes

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Sheets	>		
Reports	>		
Dashboards		What's New	
Announcements	>		
Processes	>	Take a look at highlights for	

### This is your process overview landing page.

≡ <sup>(1)</sup> Western University Western	n University of Health Sciences   Processes / Ov	rerview	0
Create Task		Assigned to: Anyone Process: Multi-Year Pi	anning 💉 + 🔹
Days to target: 0 Process target date: Nov 22, 2021 5:00 PM PST Final task due date: Dec 2, 2022 5:00 PM PST 0 days before target 8 days since start	0	Overall progress: 0%  Otasks completed  Stasks in progress  1 tasks running late	0%
Tasks Running Late	Tasks in Progress	Tasks Completed	ks

**Step 5:** Go to *Assigned to* pull-down selector and select **Me** at the top-right of the screen. This will help you view your assigned tasks only.

E Western University Western	Versity of Health Sciences   Processes / Overview	•
Days to target: 0 Process target date: Nov 22, 2021 5:00 PM PST Final task due date: Dec 2, 2022 5:00 PM PST 0 days before target 8 days since start	Overall r     0	1%
Tasks Running Late	Tasks in Progress Alex Berger aberger@westernu.edu Alex Santo - Workday Alex.Santo@westernu.edu Amy Padoondpatt anadoondpatt@westernu.ed.	

**Step 6:** Click on the *Process* pull-down menu to select **Multi-Year Planning** located at the far top-right of your screen.

Western University     Western University	of Health Sciences   Processes / Overview	0
Create Task	Assigned to: Me	rocess: Multi-Year Planning 👻 🛨 🔹
Days to target: 0 Process target date: Nov 22, 2021 5:00 PM PST Final task due date: Dec 2, 2022 5:00 PM PST • 0 days before target • 2 days since start	Overall progress: 0%  Overall progress: 0%  Overall progress: 0%  Overall progress: 0%  1 tasks running late	0%
Tasks Running Late	Tasks in Progress     Tasks Completion       Healthcare Revenue Rolling Forecast FY23 &     Image: Completion of the second sec	ted e are no completed tasks

#### Step 7: Click on Healthcare Revenue Rolling Forecast FY23 & Projections under Tasks in Progress.

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Create Task	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 2, 2022 5:00 PM PST 0 days before target 8 days since start	Overall progress: 0% Overall p	0%
Tasks Running Late	Tasks in Progress Healthcare Revenue Rolling Forecast FY23 & Do @0 Due Dec 2, 2022 5:00 PM PST Incomplete	Tasks Completed

PCC Rolling Forecast & Revenue Projection

**Note 1:** Do <u>NOT</u> add sensitive or confidential information to the notes section located on the *Process* windowpane to your left of the screen. Any notes you create can be seen by everyone who is a contributor.

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Multi-Year Planning	Nov 22	$\sim$		8	d.		1		<b>b B</b> t	<b>₽</b> (	c q				+
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	1		Revenue												
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	4		5625 - F	Patient Dise	counts			-1,745,039	-2,229,478	-1,904,002	-2,082,891	-2,144,000	0	0	
Add Note	5		5625D -	Product D	iscounts			10. SV							
	6		5638 - F	Revenue-Po	odiatry										
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	8		5646 - F	Revenue-In	centives			376,438	707,572	500,402	543,322	650,000	0	0	
	9		5661 - F	Revenue Ex	ternal Clin	ics		5,500	8,800	2,750	2,200	0			

You can click on the orange arrow on the *Process* windowpane to minimize the windowpane.

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		5661 - R	evenue Exte	ernal Clinics			5,500	8,800	2,75	0	2,200	0			

**Step 8:** Make sure you check on the *Versions* pull-down selector on the top right of the screen **FY23-26 Rolling Forecast & Projections** is selected. If it's not, click the pull-down and under the *Rolling Forecast* folder select **FY23-26 Rolling Forecast & Projection**.

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1	v	Revenue														1				
2		5401 - U	nrestricte	d Gifts					200											
3		5406 - N	on Cash	Gift Reven	ue															
4		5625 - P	atient Dis	counts			-1,745,03	39 -2,22	9,478	-1,904,00	2 -2,082	2,891	-2,144,000	0	0	0	0	0	0	0
5		5625D -	Product I	Discounts																
6		5638 - R	evenue-P	odiatry																
>		5643 - R	evenue-P	CC Pomor	na Clinic															
		5646 - R	evenue-lr	ncentives			376,43	38 70	7,572	500,40	2 543	3,322	650,000	0	0	0	0	0	0	0

**Note:** To view all sheets available please make sure you are selecting the top rollup *Levels* you have been assigned. Check the *Levels* pull-down selector located below the toolbar. If you pull down to a sub-level, you will only see the reports that pertain to that level.

**Step 9:** Select **1100 – Current Unrestricted** from the pull-down selector *Fund (Dim)*. Select the desired patient care center from the *Levels* pull-down selector to work on the rolling forecast and projection sheet.

	Western University     Western University	ersity of Hea	Ith Sciences	Shee	ts / Healtho	care Revenue	e Plan		FY23-26 R	olling Forec	ast & Projec	tions ∨ (	3 AP
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	Fund (Dim) 1100 - Current Unrestricted $ \sim $	Level	s 1415 We	stern Univers	ity Medical (	Center 🗸							
#	ACCOUNTS BY TIME	FY2019	FY2020	FY2021	FY2022	FY2023	JUL-2023	AUG-2023	SEP-2023	Q1-FY24	OCT-2023	NOV-2023	DEC-2023
1	▼ Revenue												
2	5401 - Unrestricted Gifts		200										
3	5406 - Non Cash Gift Revenue												
4	5625 - Patient Discounts	-1,745,039	-2,229,478	-1,904,002	-2,082,891	-2,144,000	0	0	0	0	0	0	0
5	5625D - Product Discounts												
6	5638 - Revenue-Podiatry												
>	5643 - Revenue-PCC Pomona Clinic												
	5646 - Revenue-Incentives	376,438	707,572	500,402	543,322	650,000	0	0	0	0	0	0	0

Step 10: Select your time range and periods you wish to display by clicking on the filter icon.

Western University     Western University of Health Sciences	Sheets	/ Healthcare Rev	enue Plan			FY23-26 Rolling	Forecast & P	rojections 💊	0	
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# Fund (Dim) 1100 - Current Unrestricted ∨ # Levels 1415 Wes	tern University	Medical Center	~							
# ACCOUNTS BY TIME INITIAL BALA FY2015	FY2020	FY2021	FY2022 FY2023	JUL-2023	AUG-2023 SI	EP-2023 Q1-FY24	OCT-2023	NOV-2023	DEC-2023	Q
1 v Revenue				l l						

Step 11: Please unclick the Month and Quarter box and only select the time frame you want to see.

Time Accounts	Levels Fund (Dim)	Sparklines	
All	Month	Quarter	Year
FY2018			
FY2019			1
FY2020			1
FY2021			1
FY2022			1
FY2023			×
FY2024			×
FY2025			×
FY2026			

**Note:** If you want to only view accounts that have activity in them the years selected, select the box below to titled **Suppress rows if all zeros or blank**. This is right above the **OK** icon.

**Step 12:** Input rolling forecast for forward looking months in the white cells. This is for each month per account being forecasted. If you have already done so, you can also make adjustments given it is a rolling forecast.

Click the eigen to save and calculate totals.

	Western University     Western	n University o	f Health Scie	ences	Sheets / H	lealthcare Re	evenue Plan				FY23-26	Rolling Fore	cast & Projec	ctions 🗸	0
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4	Fund (Dim) 1100 - Current Unrestrict	ed ∨ ∷	Levels 141	5 Western U	niversity Me	dical Center	V NOV 2022	DEC 2022	1411 2022	CER 2022	MAR 2022	ADD 2022	MAV 2022	IIIN.2022	EV2022
-	Beropus	F12022	300-2022	A06-2022	369-2022	001-2022	1404-2022	000-2022	JAN-2023	PED-2023	WAR-2025	AFR-2023	WA1-2023	3014-2023	FT2025
2	5401 - Unrestricted Gifts														
3	5625 - Patient Discounts	-2,082,891	-93,867	-197,264	-251,861	-163,421	-131,491	-109,627	-199,444	-142,663	-184,566	-188,781	-183,615	-297,399	-2,144,000
4	5646 - Revenue-Incentives	543,322	41,611	39,428	66,692	104,759	78,135	47,758	41,809	44,369	31,989	40,473	47,908	65,069	650,000
5	5661 - Revenue External Clinics	2,200		1,100	1,100	0	0	0	-1,467	0	0	0	-733	0	0
6	5662 - Revenue Medical Directorships														
7	5690 - Revenue - Physicians	3,087,870	194,629	389,523	271,225	239,311	180,930	292,292	226,528	262,838	332,167	284,378	250,306	275,872	3,200,000
>	5692 - Revenue-Capitation Program	1,404,978	122,795	141,180	120,791	119,626	122,644	50,490	195,149	126,852	123,833	123,727	104,960	147,953	1,500,000
<u> </u>	5999 - Miscellaneous Revenue					-									
10	Total	2,955,479	265,169	373,968	207,947	300,275	250,217	280,913	262,574	291,396	303,423	259,797	218,826	191,496	3,206,000
4	3	4													

Note: The numbers in green are actuals, and the numbers in black are forecasted.

This example already has projections, to adjust simply click on the cell and change the value.

Step 1: On the toolbar, click Display Options.

	Western University Western Univ	versity of Health	Sciences	Sheets	/ Healthcare	Revenue Pla	an			FY23	26 Rolling F	orecast & Pr	ojections 🗸	?	
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∷ F	und (Dim) 1100 - Current Unrestricted 🔨	H Levels	1415 Wester	n University	Medical Cent	ter 🗸								. ~	×
# 1 *	ACCOUNTS BY TIME Revenue	INITIAL BALA	FY2019	FY2020	FY2021	FY2022	FY2023	JUL-2023	AUG-2023	SEP-2023	Q1-FY24	OCT-2023	NOV-2023	DEC-2023	Q

**Step 2**: Select your time range and periods you wish to display. It helps to see previous years totals, and unclick the month and quarter displaying only yearly totals. You might also want to Suppress rows if all zeros or blank.

Time Accounts	Levels Fund (Dim)	Sparklines	
All	Month	Quarter	Yea
FY2018			
FY2019			
FY2020			
FY2021			
FY2022			
FY2023			
FY2024			
FY2025			
FY2026			

Click **Okay** and click the icon to save your changes.

## **SECTION 2: Creating the Proceeding Fiscal Year's Projection**

**Step 3:** Input your projections for forward looking years in the blue cells for each month per account being planned. Click the icon to save and calculate.

	Western University Western	n University of He	ealth Science	s She	ets / Healtl	hcare Revenu	ue Plan			F	FY23-26 Rolling	Forecast & Projecti	ons 🗸	?	
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#	ACCOUNTS BY TIME	INITIAL BALA	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	FY2025	FY2026				
1	* Revenue									-					
2	5401 - Unrestricted Gifts				200										
3	5625 - Patient Discounts		-1,514,514	-1,745,039	-2,229,478	-1,904,002	-2,082,891	-2,144,000	0	0	0				
4	5646 - Revenue-Incentives		113,143	376,438	707,572	500,402	543,322	650,000	0	0	0				
5	5661 - Revenue External Clinics		7,700	5,500	8,800	2,750	2,200	0							
6	5662 - Revenue Medical Directorships		99,129	111,698	8,998										
7	5690 - Revenue - Physicians		2,089,421	2,683,895	3,135,990	2,728,038	3,087,870	3,200,000	0	0	0				
8	5692 - Revenue-Capitation Program		998,694	1,249,325	1,503,305	1,273,367	1,404,978	1,500,000	0	0	0				
9	5999 - Miscellaneous Revenue				55,738										
10	Total		1,793,573	2,681,817	3,191,124	2,600,555	2,955,479	3,206,000	0	0	0				
4	1	4		(c		1997 - MA		1. 121 0.0							

**Note:** Rolling forecasts, as a report, more accurately supports the development of a well-planned upcoming fiscal years projections by forecasting future revenue. Some advantages of rolling forecasts include:

- Accuracy in predicting upcoming annual budgetary needs by providing a forecast (bridge) of current FY.
- Driver-based functionality to integrate goal driven information.
- Flexibility to adjust to industry and organizational changes.
- Automation and ease-of-use.
- Decision-making tool (what-if scenarios and goal seeking planning).

Furthermore, Workday allows you to view quantitative data (historical actuals in green text) to better synchronize with qualitative information on anticipated financial activity. As we move forward, you will have the ability to compare the rolling forecast version against actual results.

**Tip:** Right-click on a specific cell and select **Add Note** to leave a note. Click **OK** and **Save**. Please note these comments will <u>NOT</u> roll up to the parent levels but will be helpful when attention is needed.

	Western University Western	University of He	alth Science	s   She	ets / Healt	hcare Reveni	Je Plan				FY23-26 Rolling	Forecast & Project	ions 🗸	0	
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1	* Revenue														
2	5401 - Unrestricted Gifts				200										
3	5625 - Patient Discounts		-1,514,514	-1,745,039	-2,229,478	-1,904,002	-2,082,891	-2,144,000	0	0	0				
4	5646 - Revenue-Incentives		113,143	376,438	707,572	500,402	543,322	650,000			0				
5	5661 - Revenue External Clinics		7,700	5,500	8,800	2,750	2,200	0	Adju	st					
6	5662 - Revenue Medical Directorships		99,129	111,698	8,998					No. An					
7	5690 - Revenue - Physicians		2,089,421	2,683,895	3,135,990	2,728,038	3,087,870	3,200,000	Add	Note	0				
5	5692 - Revenue-Capitation Program		998,694	1,249,325	1,503,305	1,273,367	1,404,978	1,500,000	Evol	ore Cell	0				
4	5999 - Miscellaneous Revenue				55,738				LAP	ore over					
10	Total		1,793,573	2,681,817	3,191,124	2,600,555	2,955,479	3,206,000	Disp	lay Options	0				
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# **SECTION 2: Creating the Proceeding Fiscal Year's Projection**

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#	ACCOUNTS BY TIME	INITIAL BALA	FY2018	FY2019	FY2020	FY2021	FY2022	FY2023	FY2024	~		
1	* Revenue	1								Enter Note		
2	5401 · Unrestricted Gifts				200					Futer Mote		
3	5625 - Patient Discounts		-1,514,514	-1,745,039	-2,229,478	-1,904,002	-2,082,891	-2,144,000	0			
4	5646 - Revenue-Incentives		113,143	376,438	707,572	500,402	543,322	650,000	0			
5	5661 - Revenue External Clinics		7,700	5,500	8,800	2,750	2,200	0				
6	5662 - Revenue Medical Directorships		99,129	111,698	8,998							
7	5690 - Revenue - Physicians		2,089,421	2,683,895	3,135,990	2,728,038	3,087,870	3,200,000	0	OK Cancel		
~	5692 - Revenue-Capitation Program		998,694	1,249,325	1,503,305	1,273,367	1,404,978	1,500,000	0			
1	5999 - Miscellaneous Revenue				55 738				-			

Please add your assumptions to **Sheet Notes** icon located below your initials on the top right of your screen. We will be able to see them at the top level for your findings.

Ξ	Western University	Western University of Health Sciences Sheets / Healthcare Revenue Plan	FY23-26 Rolling Forecast & Projections 🗸 💿
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∷ Fu	nd (Dim) 1100 - Currer	t Unrestricted $\checkmark$ $$ $$ $$ $$ $$ Evels $$ 1415 Western University Medical Center $$ $$	

Sheet Notes	>
Enter Note	
OK Cancel	

**Step 1:** Once you have saved and completed your task, you may go back to the *Processes* landing page. You can do this by following one of the two options below:

• Option 1 – Click on the Healthcare Revenue Rolling Forecast title on the *Process* windowpane to the left.

Western University     Western University	ity of H	ealth	Science	s	Sheets	/ Healt	thcare R	evenue Pl	lan				FY23-20	5 Rolling Fore	ecast & Proje	ctions 🗸	0	
Multi-Year Planning Nov 22		$\sim$			Ŀ		1	6	D.	۳IJ	By	c a						÷
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Version FY23-26 Rolling Forecast & Projections	#		ACCOUNTS	S BY TIME				NITIAL BALA	<b>h</b>	FY2018	FY2019	FY2020	F¥2021	FY2U22	F¥2023	FY2024	FY2025	
Create rolling forecast for 02 04 EV22 and projections	1	Ŧ	Revenue		10%		_											
for FY24-26	2		5401 -	Unrestrict	ed Gifts						1 745 000	200	1 004 000	0.000.004	0.144.000	0		
	3		5646	Patient D	Iscounts		_		-	110 140	-1,745,039	-2,229,470	-1,904,002	-2,082,891	-2,144,000	0		
	4		5640 -	Revenue-	Extornal C	inion	_			7 700	576,430	207,572	300,402	343,322	050,000	U	U	,
	6		5662 -	Devenue I	Medical Di	rectorebine	-			00120	111 698	8 005	2,730	2,200	0			
	7		5690 -	Revenue -	Physician	ie ie				2 089 421	2 683 895	3135.990	2 728 038	3.087.870	3 200 000	0	0	1
	8		5692 -	Revenue-	Capitation	Program				998 694	1 249 325	1 503 305	1,273,367	1 404 978	1 500 000	0	0	1
	5 9		5999 -	Miscellan	eous Reve	nue	-				.,= ,0,010	55.738	1,270,007	.,	1,000,000	0		
	10		Total						1	.793.573	2.681.817	3,191,124	2,600,555	2,955,479	3,206.000	0	0	)
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• Option 2 – Click on Workday W > Processes > Overview.

■ Western University	Weste	rn University of Health Sciences Processo	es / Overview 💿 🔵
Home		Processes	Assigned to: Anyone v Process: Mutt+Year Planning v
Sheets		Overview	
Reports		Multi-Year Planning	0 tasks completed
Dashboards			1 tasks running late
Announcements			
Processes	>		
Support	>	s in k	Progress Tasks Completed

## **SECTION 3: Completing Rolling Forecast & Projection Workflow**

**Step 2:** To mark complete for your task, go to *Tasks in Progress* located in the middle of the page, and look for the task you just completed. Click on the green **Incomplete** button below your initials.

	Processes / Overview	0
	Assigned to: N	le V Process: Multi-Year Planning V + V
Days to target: 0 Process target date: Nov 22, 2021 5:00 PM PST Final task due date: Dec 2, 2022 5:00 PM PST • 0 days before target • 8 days since start	Overall progress: 0%  Overall progress: 0%	0%
Go to Process Guide → Tasks Running Late	Tasks in Progress Healthcare Revenue Rolling Forecast FY23 & IIII & IIIIIIIIIIIIIIIIIIIIIIIIIIIII	Tasks Completed

#### That will change the status to **Complete**.

OWestern University     Western University of Health Sciences	Processes / Overview		?	
S Task completed				×
Days to target: 0 Process target date: Nov 22, 2021 5:00 PM PST Final task due date: Dec 2, 2022 5:00 PM PST 0 days before target 8 days since start	Overall progress: 16% <ul> <li>1 tasks completed</li> <li>4 tasks in progress</li> <li>1 tasks running late</li> </ul>		16%	
Go to Process Guide → Tasks Running Late	Tasks in Progress	Tasks Completed Healthcare Revenue Rolling Forecast FY23 & ID I I I I Completed Oct 25, 2022 4:10 PM PDT Complete		2

Once the FP&A team begins reviewing the tasks, you will need to notify the team if you need to make any additional changes to your forecasting or projections.