

Phase I Budget Development Task Instructions

Overview

This guide provides instructions for completing the **FY2027 Phase I Financial Planning and Budget Development Process** tasks in Workday.

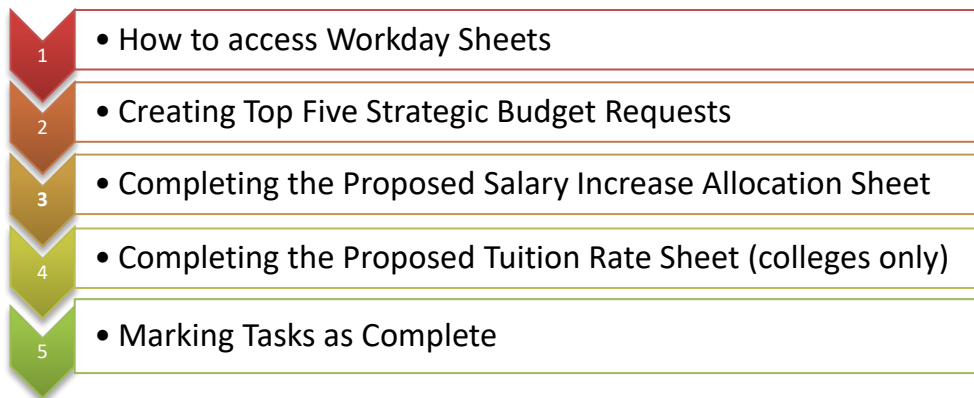
Financial data has been provided into Workday to support this process. Historical Actuals reporting (dating back to 2017) is also available in Workday and may be used to assist with budget planning.

During this phase, each college/department will:

- Access the “**Top 5 Strategic Budget Request**” sheet located under the *FY27 3-Year SBP Financial Projection (End User)* version.
- Enter all **five priority requests**, with one line item required for each request.

Important: Please do not make any budget reallocations in Workday during the request phase.

What to Expect: Step-by-Step



Accessing Workday

Step 1: Go to: <https://login.adaptiveinsights.com/app>

Step 2: Enter your username and password. By default, your Username will be your email address, and the **Password field should be left blank**. Click **Sign In**.

Username or Email *

Password *



☐ Remember Username

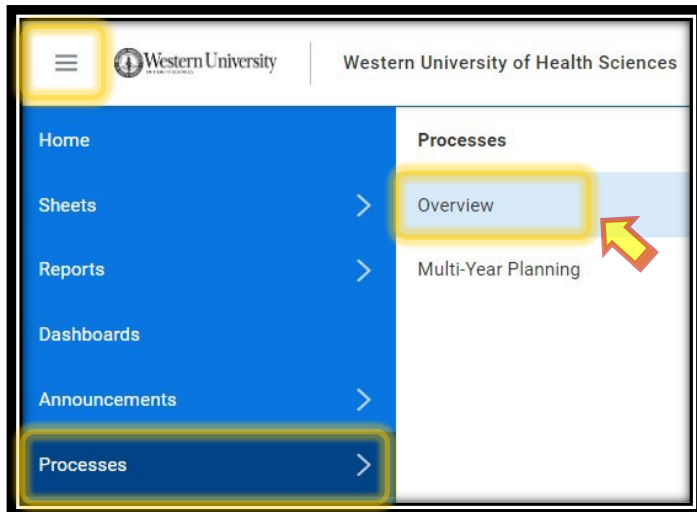
Sign In

[Forgot Password](#)

Note: For all Login issues, please contact us at FP&A@westernu.edu

Accessing the Workday Sheets

Step 1: Click on the ☰ Menu icon at the Top left and under **Processes**, click **Overview**.

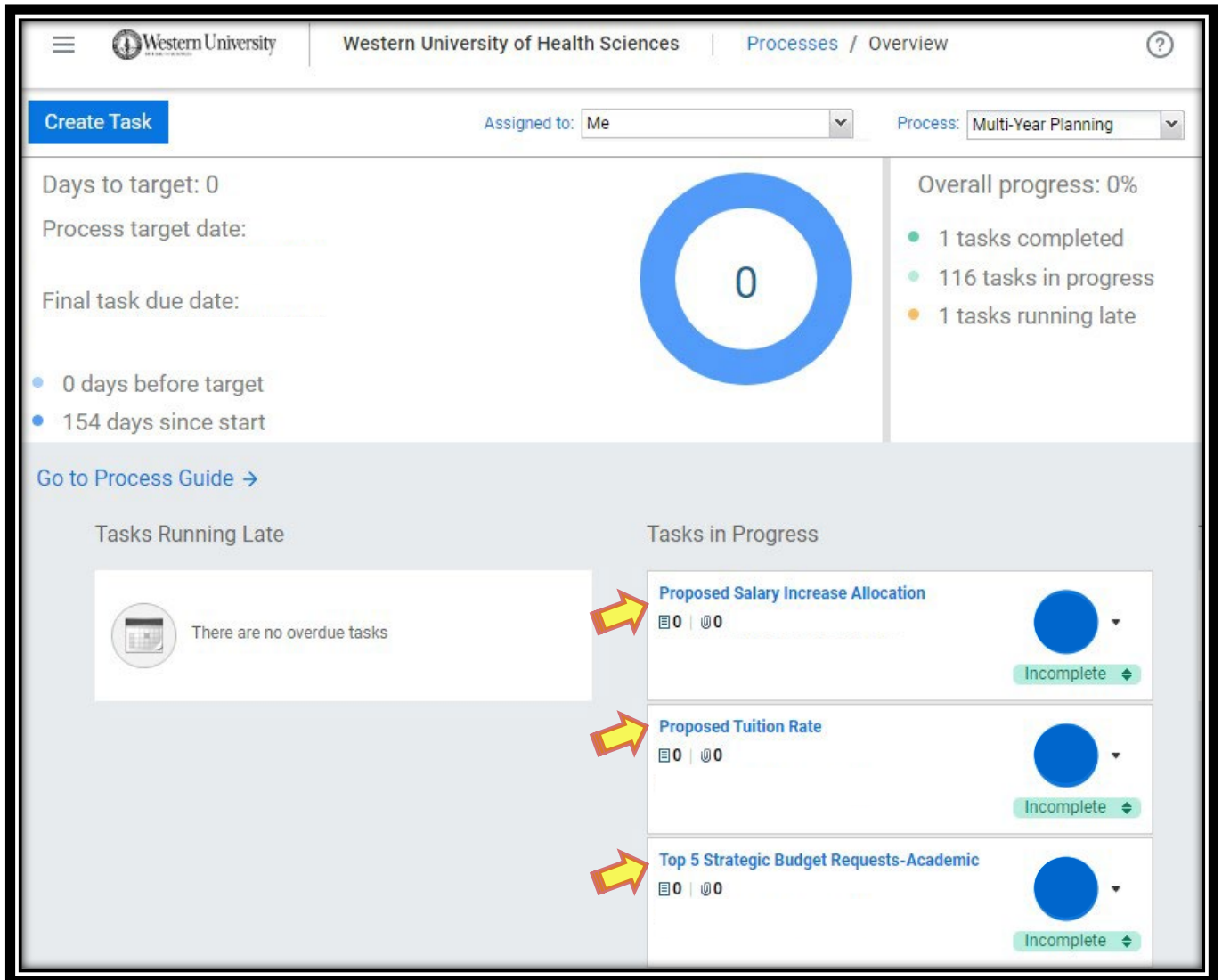


Step 2: Confirm selections for the Assigned to and Process lists:



Select **Me** from the Assigned to dropdown list. Select **Multi-Year Planning** from the Process dropdown list.

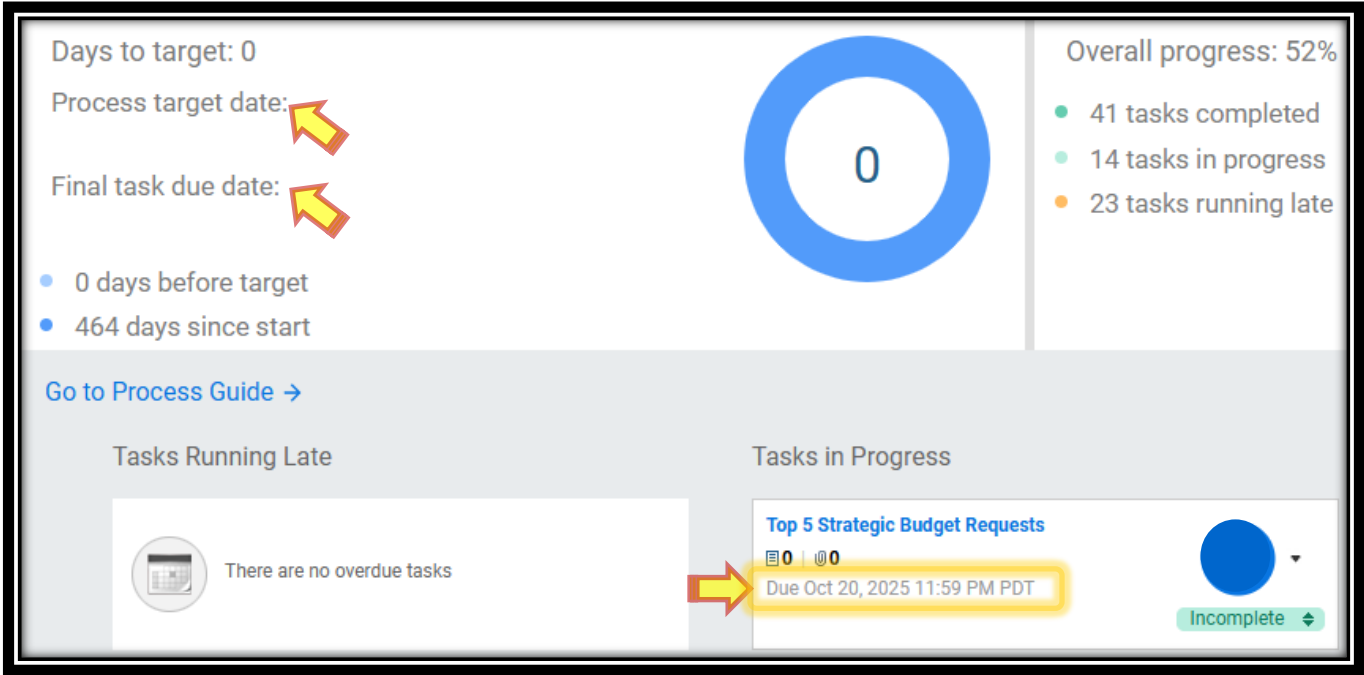
Step 3: All sheets assigned to you will appear under the Tasks in Progress section.



The assigned tasks for the Phase I Budget Development process will include:

- Top 5 Strategic Budget Requests **(Support only)**
- Top 5 Strategic Budget Requests-Academic **(Colleges only)**
- Top 5 Strategic Budget Requests-Healthcare **(Patient Care Centers only)**
- Proposed Salary Increase Allocation
- Proposed Tuition Rate **(Colleges only)**

Note: You can disregard the 'Process target date' and 'Final task due date'.
The due date shown within each task is the actual deadline by which the task must be completed.



Section I: Accessing the Budget Request Sheet

Step 1: Click **Top 5 Strategic Budget Requests** under the Tasks in Progress list.

Days to target: 0

Process target date:

Final task due date:

0 days before target

464 days since start

0

Overall progress: 52%

41 tasks completed

14 tasks in progress

23 tasks running late

Go to Process Guide →

Tasks Running Late

Tasks in Progress

There are no overdue tasks

Top 5 Strategic Budget Requests

0 | 0

Due Oct 20, 2025 11:59 PM PDT

Incomplete

Step 2: Review the **Description** provided on the left side of the sheet.

Western University

Western University of Health Sciences

Sheets / Top 5 Stra

Multi-Year Planning

Oct 20

Top 5 Strategic Budget Re...

Oct 20

Description

Notes

Content

Top 5 Strategic Budget Request

Version

FY27 3 Year SBP Financial Projection (End User)

On this sheet, please select the ORG for your request. Please select or input your data for each column. All fields are required to be completed.

#

INITIATIVE ID

GL ACCOUNT

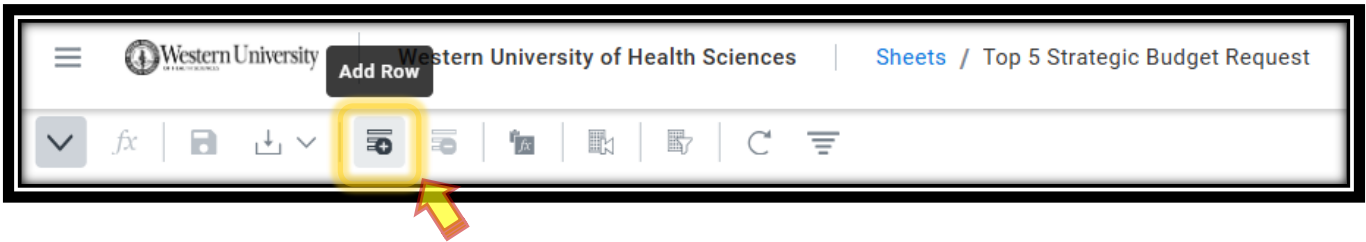
1

Total

Showing rows 0 of 0.

Section II: Creating Top Five Priorities

Step 1: Click **Add Row** icon towards the top of the screen.



Step 2: Input the Initiative ID¹, GL Acct #, Request Amount, Effective Date, and Priority Ranking. Indicate under the Funding Type, whether the request is a one-time or ongoing need, provide a Compensation Analysis Reference #² (new positions & position modifications only). Indicate the primary strategic theme and provide a short rationale/justification.

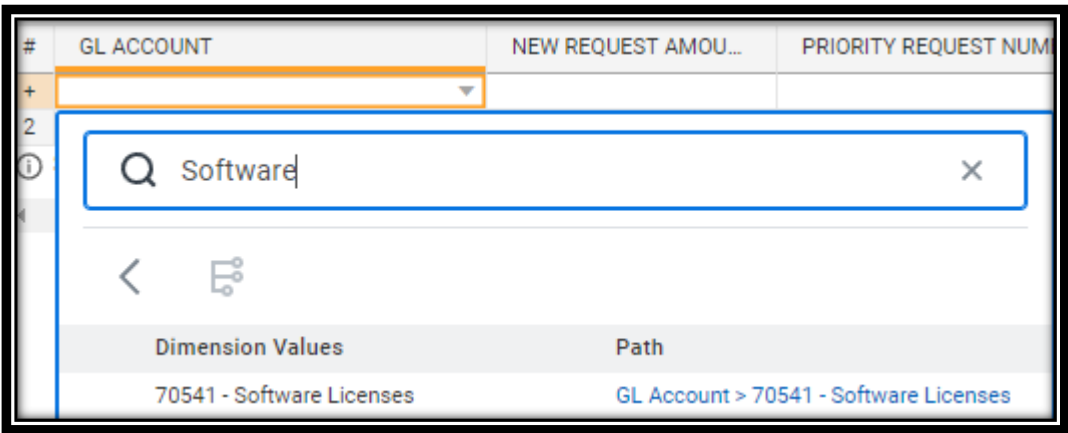
Note 1: The Initiative ID must be the same as the ID used on your Strategic Initiatives List Sheet.

Note 2: The Compensation Analysis Reference # will be provided by HR/Compensation, via email.

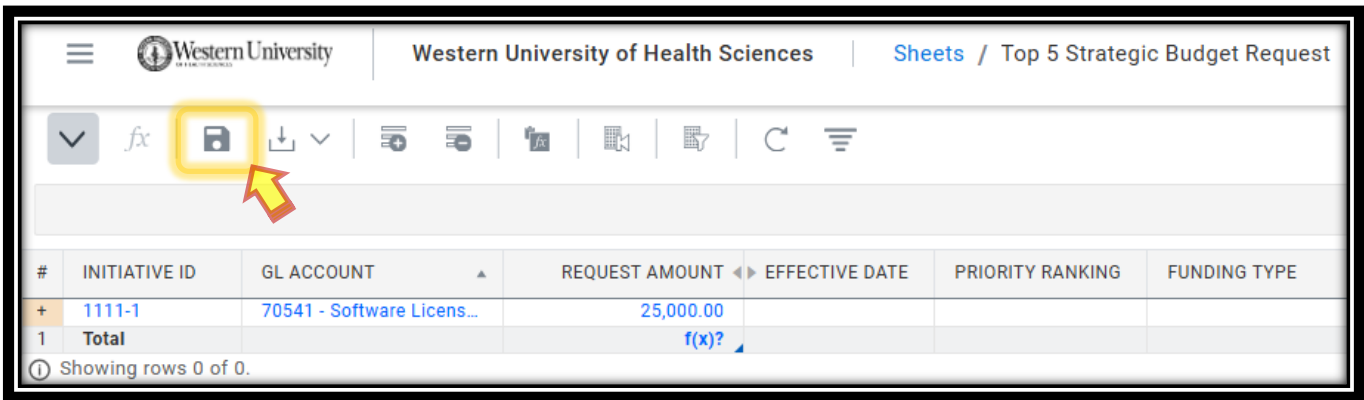
#	INITIATIVE ID	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING	FUNDING TYPE
+						
Showing rows 0 of 0						

SHORT RATIONALE/JUSTIFICATION	COMPENSATION ANALYSIS REFERENCE #	PRIMARY STRATEGIC THEME

By hovering over a cell, a small arrow icon will appear. Click the icon to open a window where you can search for an account number by its title.




Step 3: Click the **Save** icon to save your work. Be sure to do this often, as the system does not save automatically.



Step 4: Repeat Steps 1 and 2 until you have entered all five requests.

#	INITIATIVE ID	GL ACCOUNT	REQUEST AMOUNT	EFFECTIVE DATE	PRIORITY RANKING	FUNDING TYPE	SHORT RATIONALE/JUSTIFICATION	COMPENSATION ANALYSIS REFERENCE #
+	1111-1	6200 - Salaries - Admini...	100,000.00	7/1/2026	1 - highest level	Ongoing	Short Rationale/Justification	DEP100
+	1111-1	6850 - Allocated Fringe ...	33,200.00	7/1/2026	1 - highest level	Ongoing	Short Rationale/Justification	DEP100
+	1111-2	70915 - Contracted Serv...	10,000.00	7/1/2026	3 - middle level	One-time	Short Rationale/Justification	
+	1111-2	79200 - Equipment-Com...	2,200.00	7/1/2026	2 - second highest...	One-time	Short Rationale/Justification	

Step 5: If you need to add any additional notes, click the  icon in the top-right corner of the window. Click **OK**.

Sheet Notes

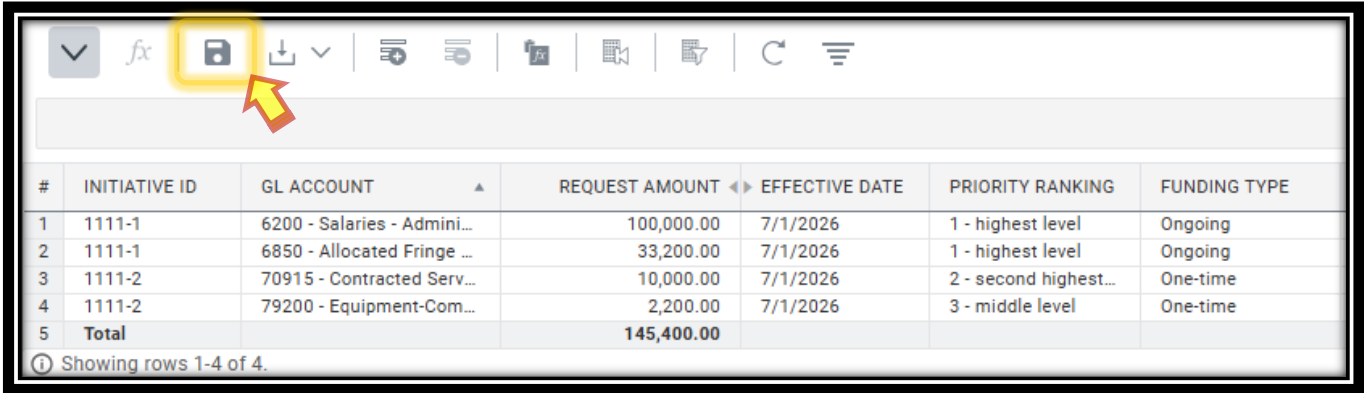
Enter Note

OK

Cancel

If you need to include additional files as backup documentation, please save them to the shared W:drive.

Step 6: After reviewing and completing your entries, click the **Save** icon again. The text will change from blue to black to indicate it has been saved.



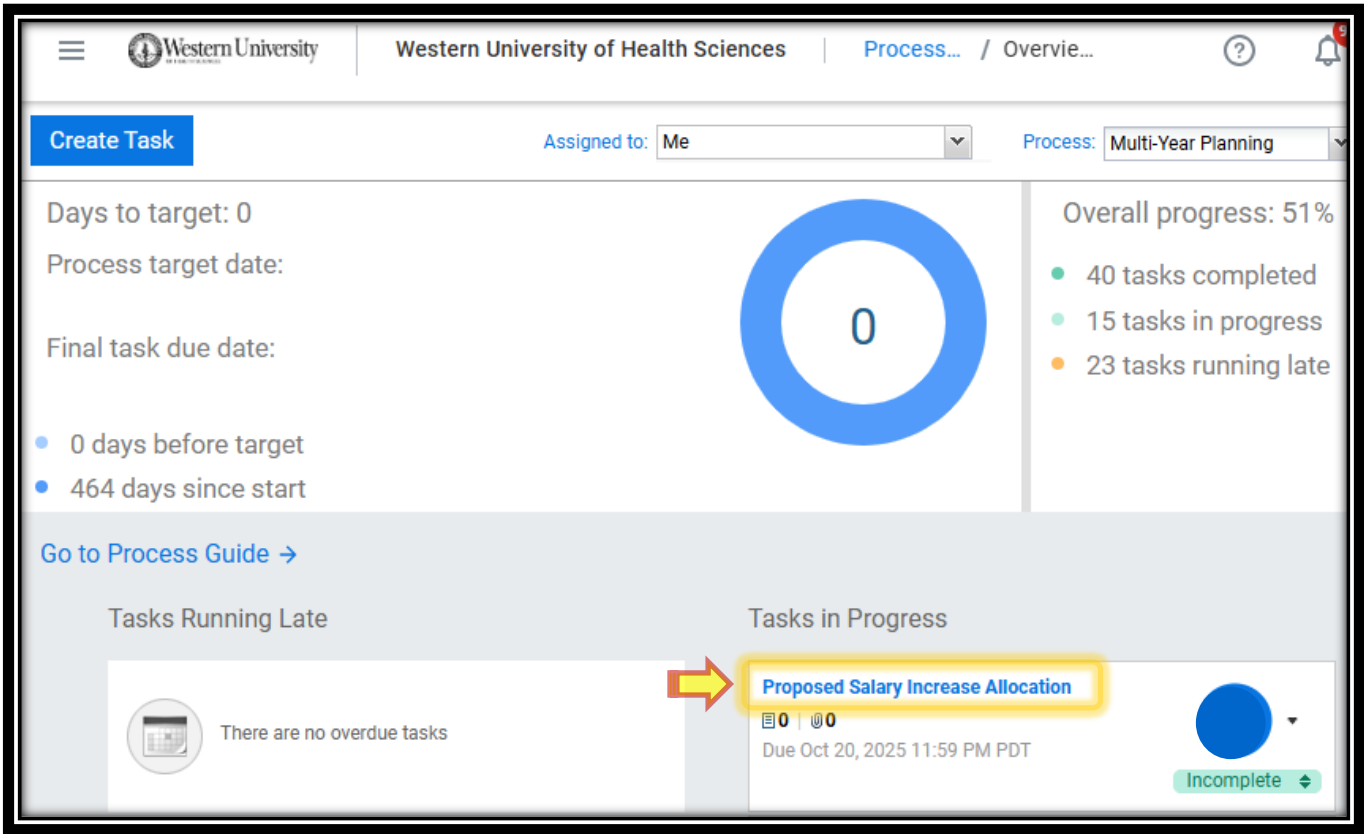
The screenshot shows a software interface with a toolbar at the top and a data table below. The toolbar includes a dropdown menu, a formula icon (fx), a save icon (floppy disk) which is highlighted with a yellow box and a red arrow, and several other icons for undo, redo, and other functions. The table has 7 columns: #, INITIATIVE ID, GL ACCOUNT, REQUEST AMOUNT, EFFECTIVE DATE, PRIORITY RANKING, and FUNDING TYPE. It contains 5 rows of data, including a total row.

#	INITIATIVE ID	GL ACCOUNT ▲	REQUEST AMOUNT ◀▶	EFFECTIVE DATE	PRIORITY RANKING	FUNDING TYPE
1	1111-1	6200 - Salaries - Admini...	100,000.00	7/1/2026	1 - highest level	Ongoing
2	1111-1	6850 - Allocated Fringe ...	33,200.00	7/1/2026	1 - highest level	Ongoing
3	1111-2	70915 - Contracted Serv...	10,000.00	7/1/2026	2 - second highest...	One-time
4	1111-2	79200 - Equipment-Com...	2,200.00	7/1/2026	3 - middle level	One-time
5	Total		145,400.00			

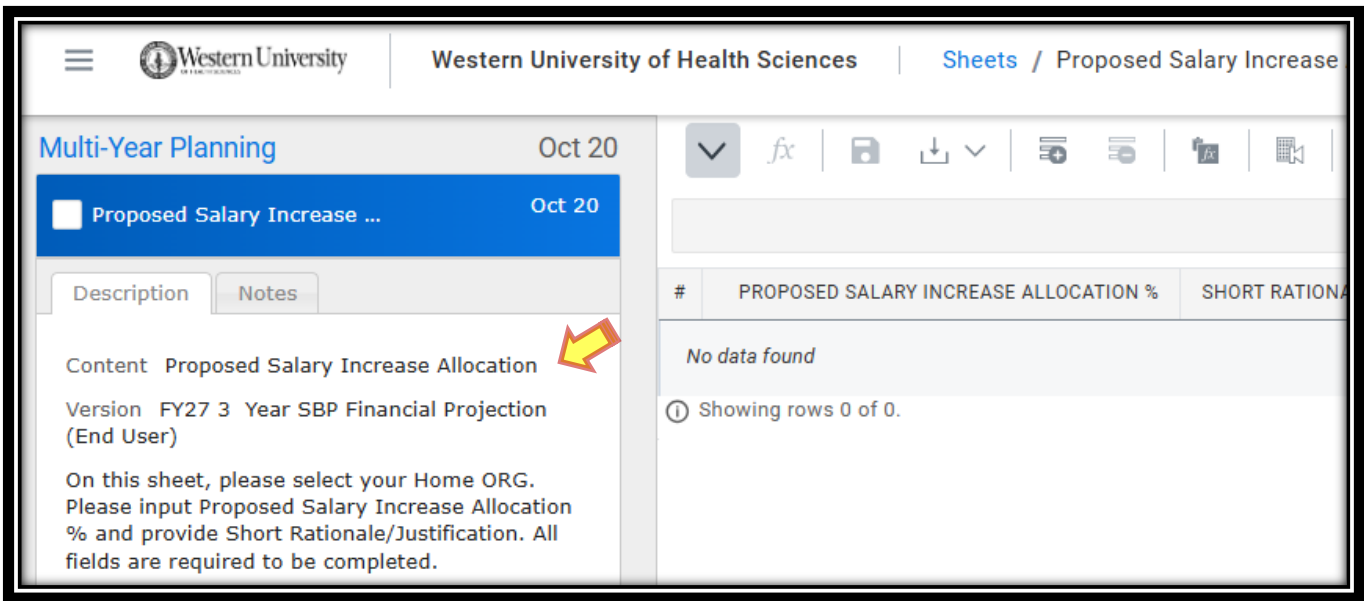
Showing rows 1-4 of 4.

Section III: Accessing the Proposed Salary Increase Allocation Sheet

Step 1: Click **Proposed Salary Increase Allocation** under the Tasks in Progress list.

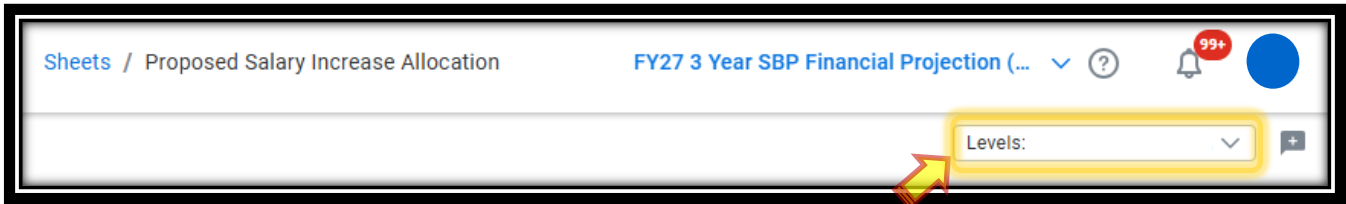


Step 2: Review the **Description** provided on the left side of the sheet.



Section IV: Completing the Proposed Salary Increase Allocation Sheet

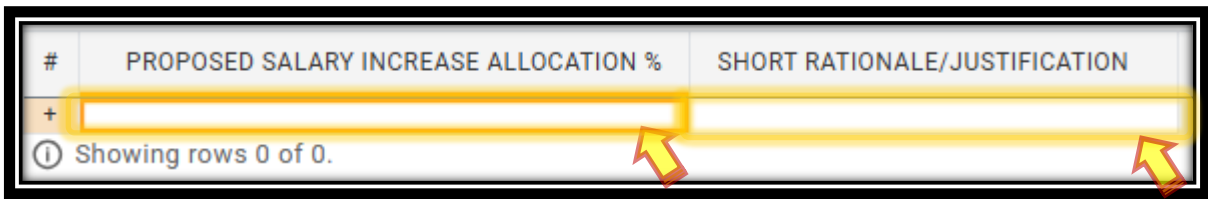
Step 1: Select your Home Org from the Levels dropdown list.



Step 2: Click the **Add Row** icon towards the top of the screen.




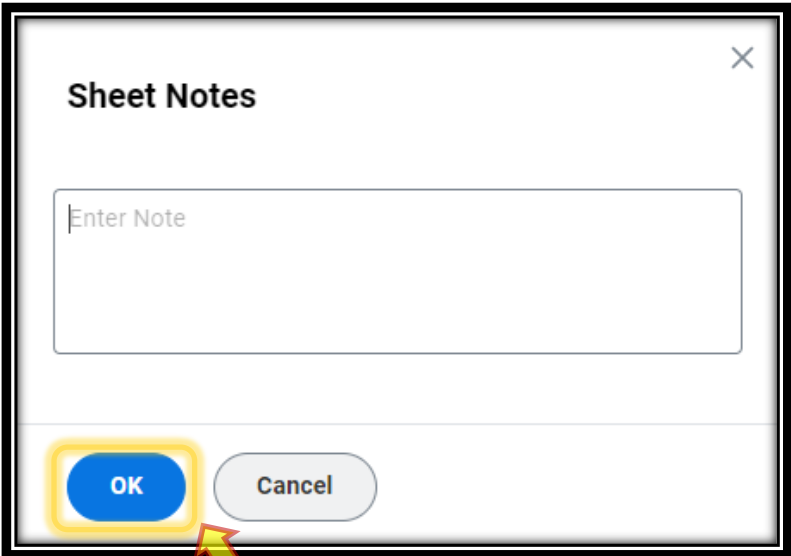
Step 3: Enter the salary increase allocation percentage and provide a rationale in the corresponding columns.



Click on a cell to input information.

Note: You do not need to include the “%” when entering a rate (number) into the Proposed Salary Increase Allocation % field.

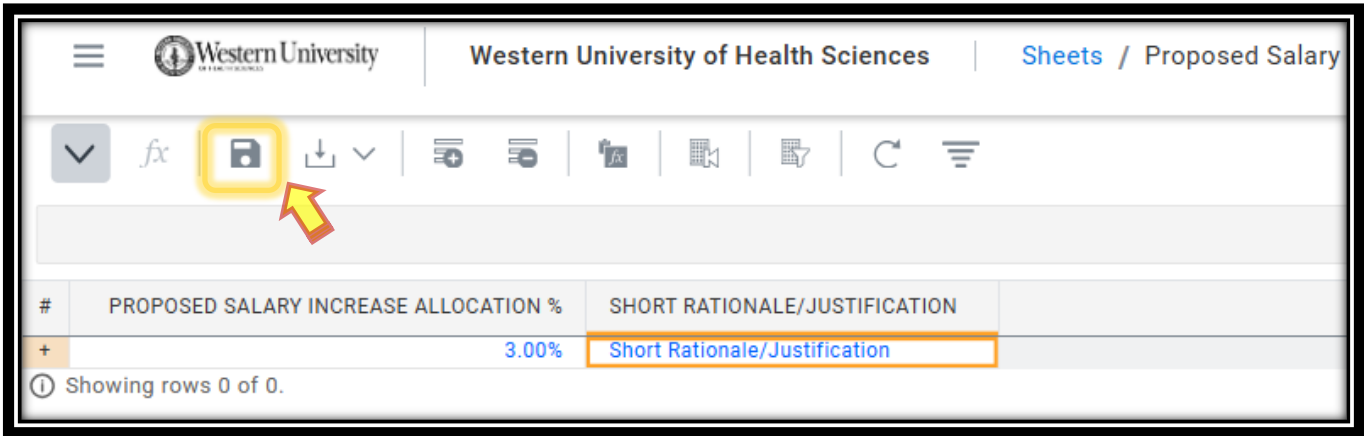
Step 4: If you need to add any additional notes, click the  icon in the top-right corner of the window. Click **OK**.



A dialog box titled "Sheet Notes" with a close button (X) in the top right corner. It contains a text input field with the placeholder text "Enter Note". At the bottom, there are two buttons: "OK" (highlighted with a yellow box and a red arrow) and "Cancel".

If you need to include additional files as backup documentation, please save them to the shared W:drive.

Step 5: Once reviewed and completed, click on the **Save** icon again.

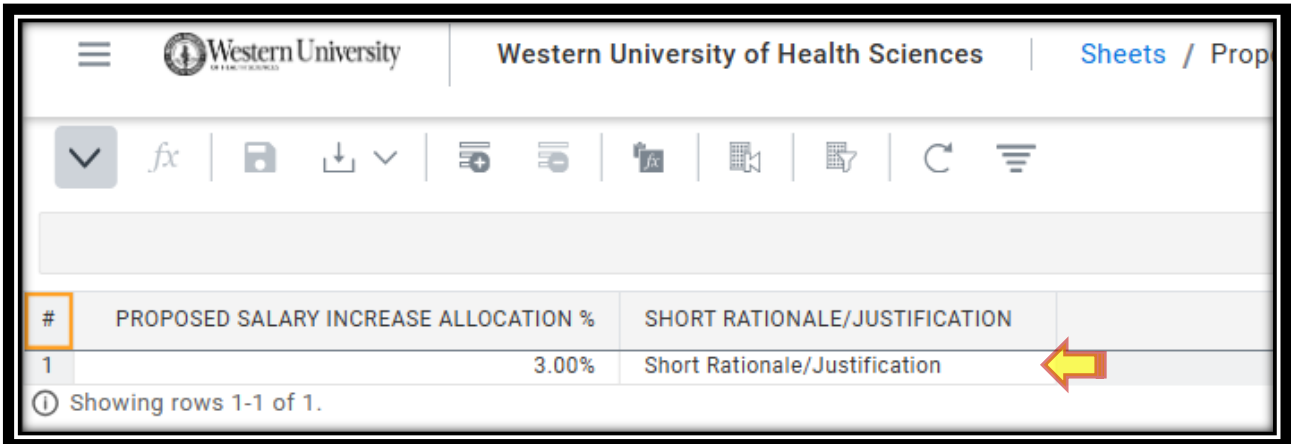


A screenshot of a spreadsheet application interface. The top bar shows the Western University logo and the text "Western University of Health Sciences" and "Sheets / Proposed Salary". Below the top bar is a toolbar with various icons. The "Save" icon (a floppy disk) is highlighted with a yellow box and a red arrow. Below the toolbar is a table with the following structure:

#	PROPOSED SALARY INCREASE ALLOCATION %	SHORT RATIONALE/JUSTIFICATION
+	3.00%	Short Rationale/Justification

Below the table, it says "Showing rows 0 of 0."

The text will change from blue to black to indicate it has been saved.



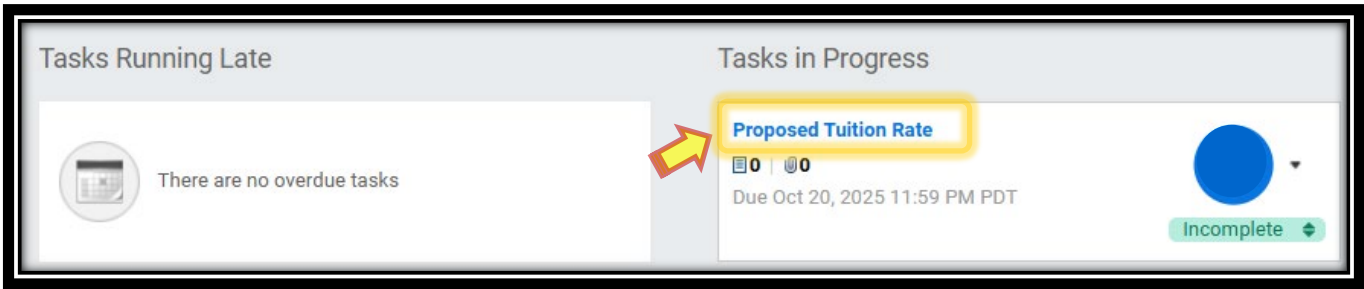
A screenshot of the same spreadsheet application interface, showing the state after saving. The "Save" icon in the toolbar is no longer highlighted. The table now shows one row:

#	PROPOSED SALARY INCREASE ALLOCATION %	SHORT RATIONALE/JUSTIFICATION
1	3.00%	Short Rationale/Justification

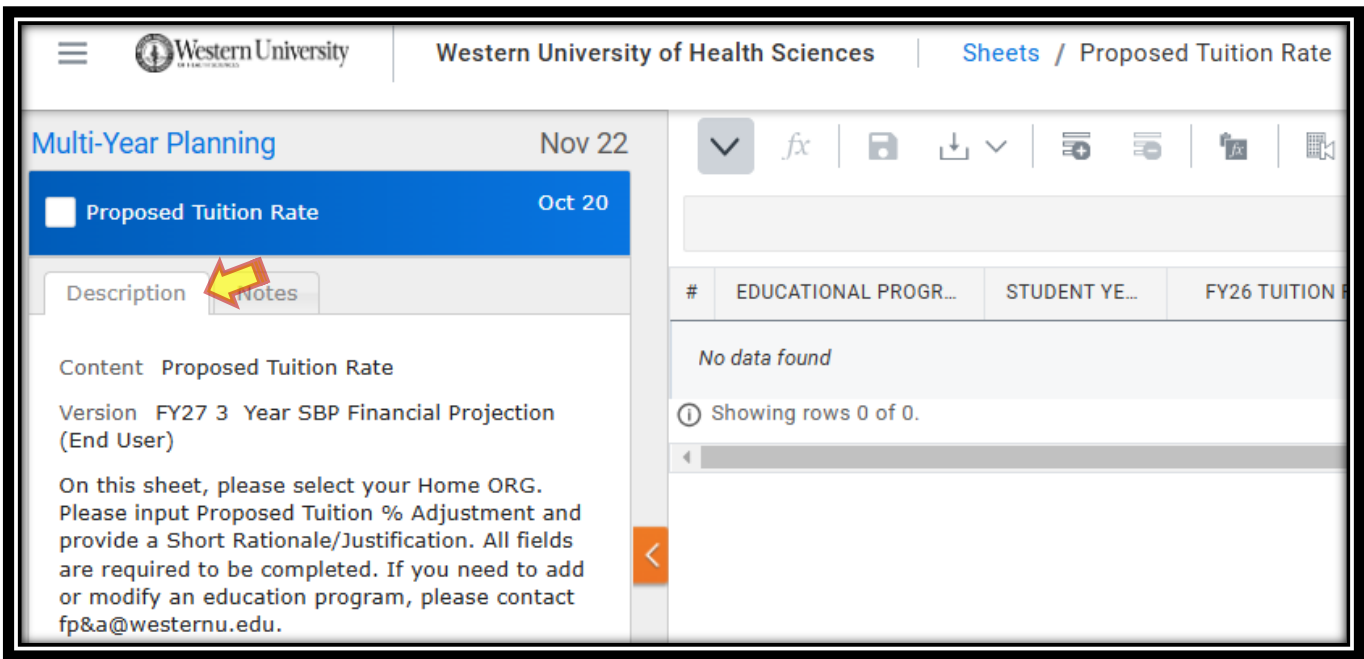
Below the table, it says "Showing rows 1-1 of 1." A red arrow points to the text "Short Rationale/Justification" in the table, indicating it has changed from blue to black.

Section V: Accessing Proposed Tuition Rate Sheet

Step 1: Click **Proposed Tuition Rate** under the Tasks in Progress list.

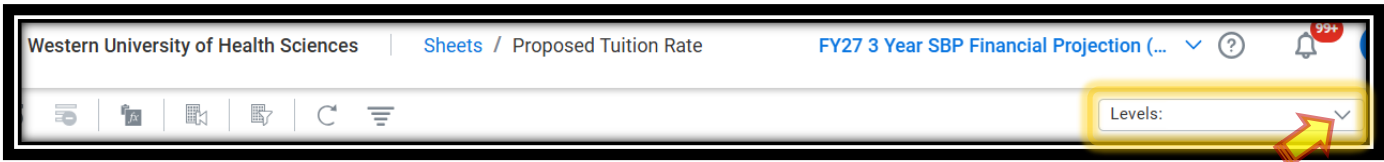


Step 2: Review the **Description** provided on the left side of the sheet.

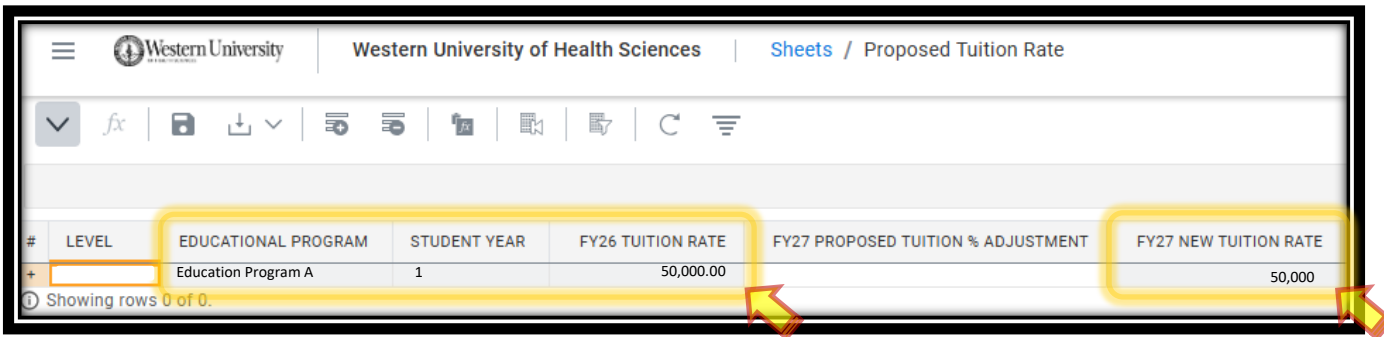


Section VI: Completing the Proposed Tuition Rate Sheet

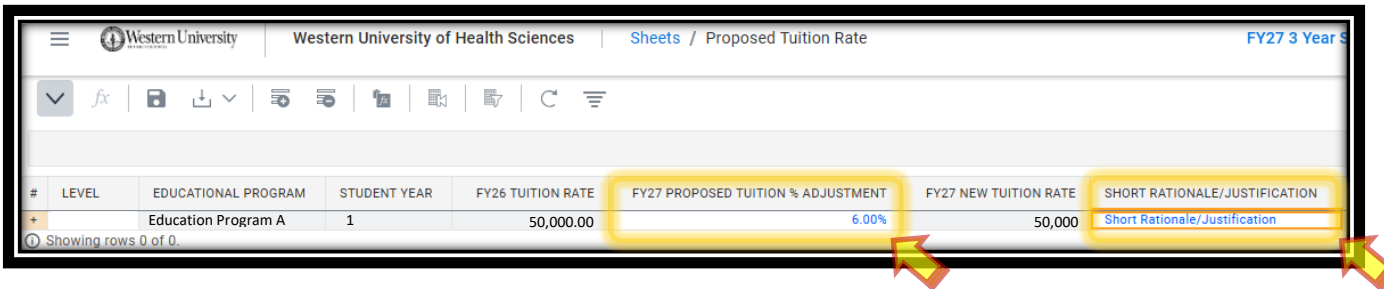
Step 1: Select your Home Org from the Levels dropdown list.




Note: Information under the Educational Program, Student Year, FY26 Tuition Rate and FY27 New Tuition Rate fields will automatically populate based on the current data.

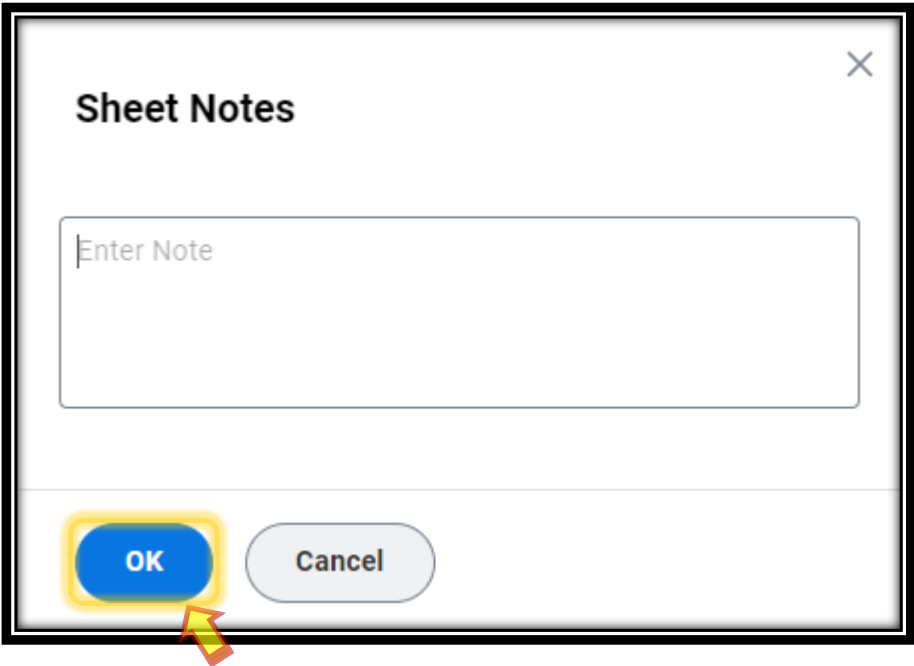


Step 2: Click on the cell to enter your FY27 Proposed Tuition % Adjustment rate and complete the Short Rationale/Justification field. After entering this information, click the **Save** icon, and the new tuition rate will be calculated automatically.



Note: You do not need to include the “%” when entering a number into the FY27 Proposed Tuition % Adjustment field.

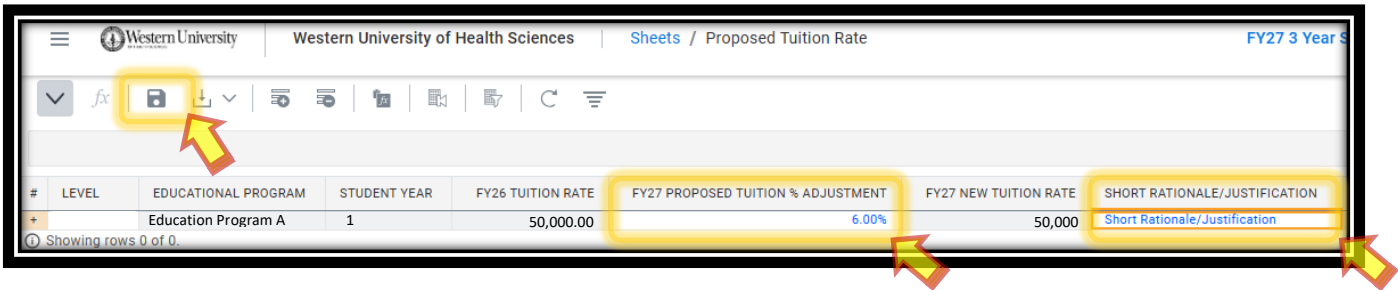
Step 3: If you need to add any additional notes, click the  icon in the top-right corner of the window. Click **OK**.



The 'Sheet Notes' dialog box features a title bar with a close button (X) in the top right corner. Below the title is a large text input area with the placeholder text 'Enter Note'. At the bottom of the dialog, there are two buttons: a blue 'OK' button and a grey 'Cancel' button. A yellow box highlights the 'OK' button, and a red arrow points to it from the bottom right.

If you need to include additional files as backup documentation, please save them to the shared W:drive.

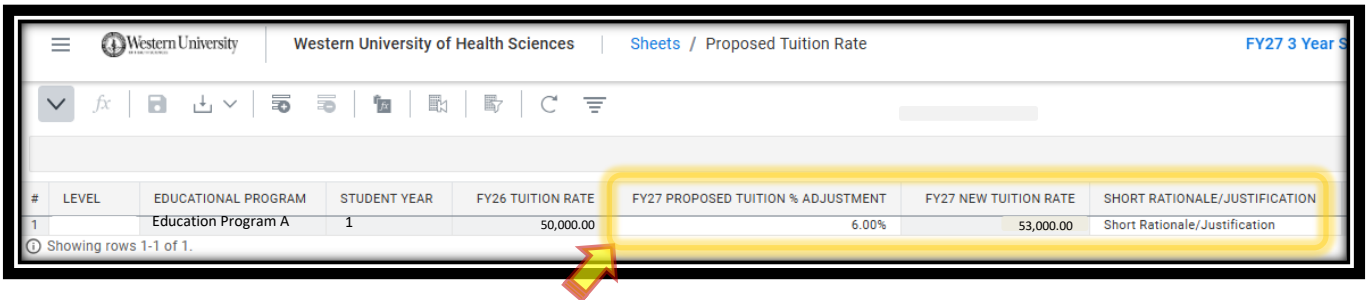
Step 4: Once reviewed and completed, click on the **Save** icon again.



This screenshot shows the spreadsheet interface with several elements highlighted by yellow boxes and red arrows. The 'Save' icon (a floppy disk) in the top toolbar is highlighted. The 'FY27 PROPOSED TUITION % ADJUSTMENT' column contains the value '6.00%' in blue text. The 'SHORT RATIONALE/JUSTIFICATION' column contains the text 'Short Rationale/Justification' in blue text. A red arrow points to the 'Save' icon, and another red arrow points to the '6.00%' cell.

#	LEVEL	EDUCATIONAL PROGRAM	STUDENT YEAR	FY26 TUITION RATE	FY27 PROPOSED TUITION % ADJUSTMENT	FY27 NEW TUITION RATE	SHORT RATIONALE/JUSTIFICATION
+		Education Program A	1	50,000.00	6.00%	50,000	Short Rationale/Justification

The text will change from blue to black to indicate it has been saved, and the FY27 New Tuition Rate will adjust.



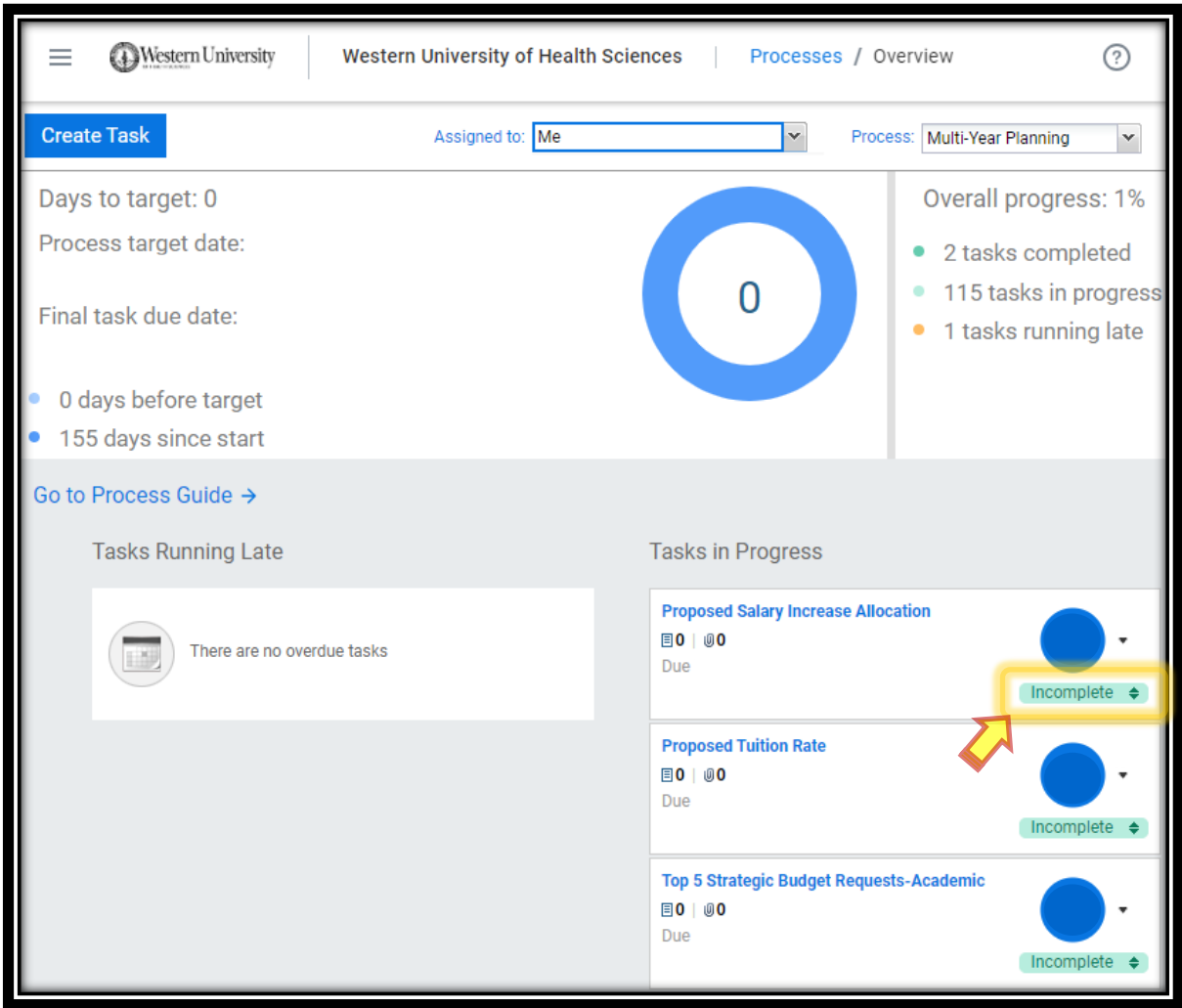
This screenshot shows the spreadsheet interface after the changes have been saved. The 'FY27 PROPOSED TUITION % ADJUSTMENT' column now shows '6.00%' in black text. The 'FY27 NEW TUITION RATE' column now shows '53,000.00' in black text. The 'SHORT RATIONALE/JUSTIFICATION' column still shows 'Short Rationale/Justification' in black text. A red arrow points to the '6.00%' cell.

#	LEVEL	EDUCATIONAL PROGRAM	STUDENT YEAR	FY26 TUITION RATE	FY27 PROPOSED TUITION % ADJUSTMENT	FY27 NEW TUITION RATE	SHORT RATIONALE/JUSTIFICATION
1		Education Program A	1	50,000.00	6.00%	53,000.00	Short Rationale/Justification

Section VI: Marking Tasks as Completed in Workday

Step 1: Repeat the steps to access the 'Processes' page in Workday to view all Tasks.

Step 2: Click the **Incomplete** button to mark a Task as completed.



The completed task will automatically move to the “Tasks Completed” column.

