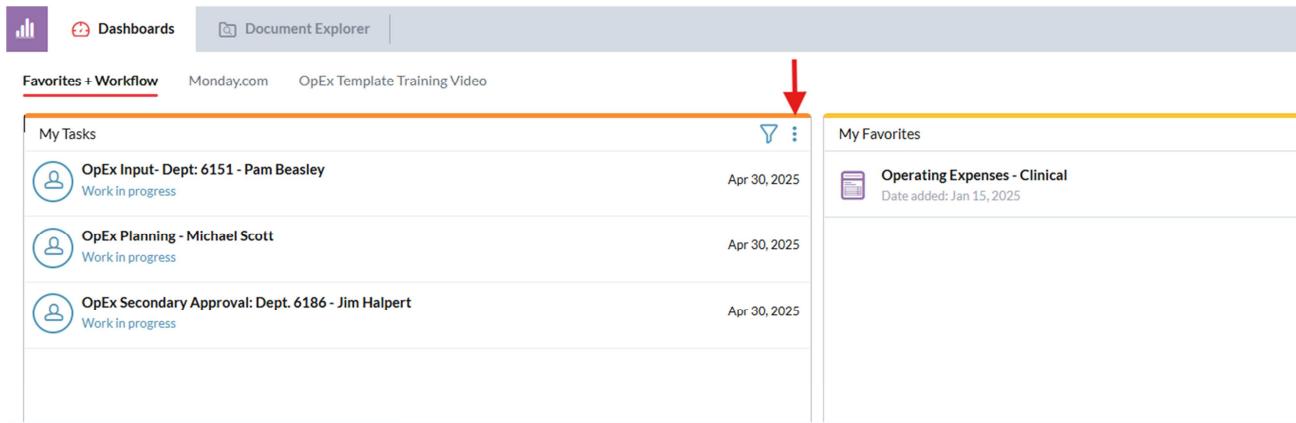


## Data Entry Template – Online Data Entry

### Accessing Budget Templates

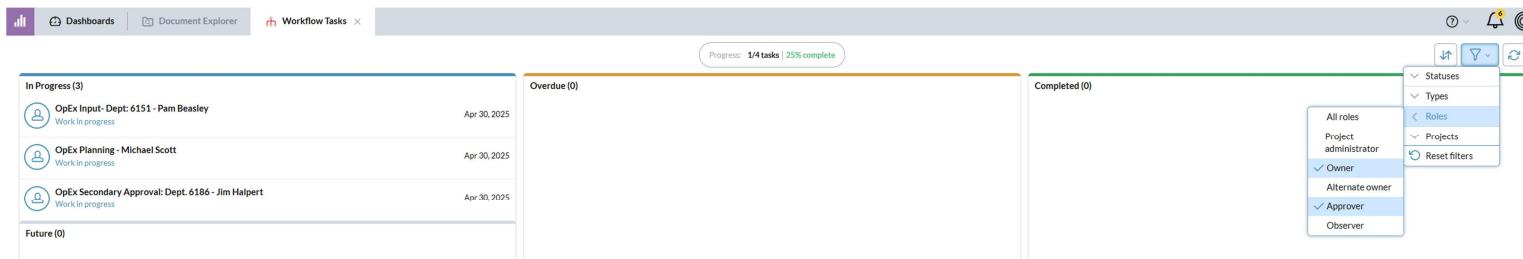
- Below is an example of the Dashboard in Prophix. The My Tasks section contains your budget templates. Clicking on the task will open the associated template.



The screenshot shows the Prophix dashboard with the 'My Tasks' section highlighted. The tasks listed are:

- OpEx Input- Dept: 6151 - Pam Beasley (Work in progress, due Apr 30, 2025)
- OpEx Planning - Michael Scott (Work in progress, due Apr 30, 2025)
- OpEx Secondary Approval: Dept. 6186 - Jim Halpert (Work in progress, due Apr 30, 2025)

- Alternatively, you can view your Tasks filtered by your role by selecting the  icon in My Tasks and then clicking Launch.
- Next, click the filter icon in the right corner to select either the Owner role (data entry) or Approver role (template review and approval)



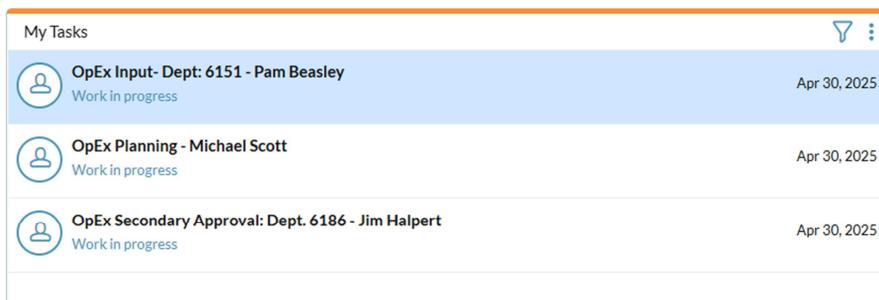
The screenshot shows the 'Workflow Tasks' page with tasks filtered by role. The tasks listed are:

- In Progress (3):
  - OpEx Input- Dept: 6151 - Pam Beasley (Work in progress, due Apr 30, 2025)
  - OpEx Planning - Michael Scott (Work in progress, due Apr 30, 2025)
  - OpEx Secondary Approval: Dept. 6186 - Jim Halpert (Work in progress, due Apr 30, 2025)
- Overdue (0)
- Completed (0)

The sidebar on the right shows the filter settings for 'Owner'.

### Data Entry as Task Owner

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The screenshot shows the 'My Tasks' section with tasks for the 'Owner' role. The tasks listed are:

- OpEx Input- Dept: 6151 - Pam Beasley (Work in progress, due Apr 30, 2025)
- OpEx Planning - Michael Scott (Work in progress, due Apr 30, 2025)
- OpEx Secondary Approval: Dept. 6186 - Jim Halpert (Work in progress, due Apr 30, 2025)

- Tasks labelled as “**OpEx Input - Dept.#### - Your Name**” are tasks that you are the owner of and are responsible for completing data entry for.
- When you click on the task it will open the template for data entry. **\*Note- Enter data only for the departments listed in the task name.**

Account Notes	GL Account	FY2024 - Actual	FY2025 - Budget	YTD	Jul'24 - Feb'25	N
<b>Total Department Expenses</b>						
<b>Employee Expenses</b>						
17 Value of worked hours 6000 Salary & Wages						
18 Over Time	6001 Premium OT					
19 -	6002 Non Care Salary and Wages					
20 Amount of actual paid time off taken	6005 Salary Non Work Time/PTO					
21 Fees for Temporary Staff in the Clinics	6130 Temporary Staff Fees - Clinical					
22 Fees for Temporary Staff in Administration	6131 Temporary Staff Fees - Administration					
<b>Salaries and wages</b>						
<b>Employee Benefits and Taxes</b>						
26 Employer portion of Social Security (6.2%) and Medicare (1.45%) payroll taxes	6021 Employer FICA					

- Once the template is open, use the Department dropdown menu in the Pages window to select the department listed in the task name.
- The first section displays historical data as a reference in columns G through J
  - G: Prior Year Actuals
  - H: Current Year Budget
  - I: Year to Date data for the current fiscal year (ending with the last closed month)
  - J: Trailing 12 Months data (ending with the last closed month)
- # of Treatments and FTE values are also provided as a reference in Rows 11 and 12

Account Notes	GL Account	FY2024 - Actual	FY2025 - Budget	YTD	Trailing 12	
<b>Total Department Expenses</b>						
<b>Employee Expenses</b>						
17 Value of worked hours	6000 Salary & Wages					\$
18 Over Time	6001 Premium OT					\$
19 -	6002 Non Care Salary and Wages					\$
20 Amount of actual paid time off taken	6005 Salary Non Work Time/PTO					\$
21 Fees for Temporary Staff in the Clinics	6130 Temporary Staff Fees - Clinical					\$
22 Fees for Temporary Staff in Administration	6131 Temporary Staff Fees - Administration					\$
<b>Salaries and wages</b>						

- The next section displays the Expense per Treatment for each of the historical time periods (Columns L-N), as well as for the inputted Budget (Column O).

- Column Q displays the variance in the Per Treatment cost between the inputted Budget (Column O) and the current year Budget (Column L)
  - A Target variance of -10% is indicated on the template

GL Account	FY2025 - Budget	Per Treatment			FY2025 - Budget	FY2025 YTD	Trailing 12	FY2026 Budget Current	Current vs FY2025 Budget	TARGET
		YTD	Jul'24 - Feb'25	Trailing 12						
# of Treatments										-10.00%
FTE										
<b>Total Department Expenses</b>					\$ -	\$ -	\$ -	\$ -		0.00%
<b>Employee Expenses</b>										
6000 Salary & Wages					\$ -	\$ -	\$ -	\$ -		0.00%
6001 Premium OT					\$ -	\$ -	\$ -	\$ -		0.00%
6002 Non Care Salary and Wages					\$ -	\$ -	\$ -	\$ -		0.00%
6005 Salary Non Work Time/PTO					\$ -	\$ -	\$ -	\$ -		0.00%
6130 Temporary Staff Fees - Clinical					\$ -	\$ -	\$ -	\$ -		0.00%
6131 Temporary Staff Fees - Administration					\$ -	\$ -	\$ -	\$ -		0.00%
<b>Salaries and wages</b>					\$ -	\$ -	\$ -	\$ -		0.00%

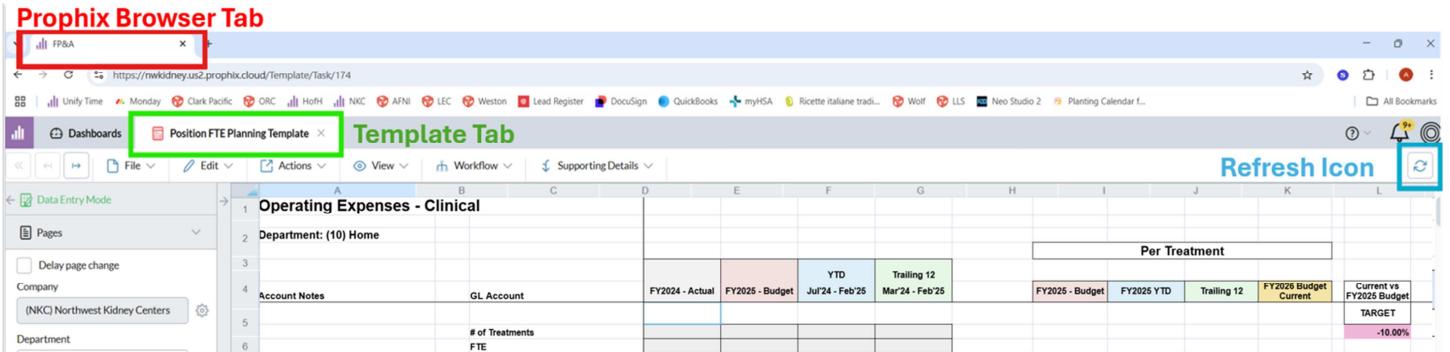
- Only light-yellow cells are open for data entry.
- Input budget values **by month** for accounts that have these light-yellow data entry cells. Once you Save/Refresh the template these values will be summed up in Column S
- Grey cells are uneditable as the values are derived from the Personnel Model
- **\*\*\*Ensure you fill out data for all Departments in the template**

GL Account	FY2026 Budget Current	**Enter Data in yellow cells by month										AA
		Jul FY26	Aug FY26	Sep FY26	Oct FY26	Nov FY26	Dec FY26	Jan FY26	Feb FY26			
# of Treatments												
FTE												
<b>Total Department Expenses</b>												
<b>Employee Expenses</b>												
6000 Salary & Wages												
6001 Premium OT												
6002 Non Care Salary and Wages												
6005 Salary Non Work Time/PTO												
6130 Temporary Staff Fees - Clinical												
6131 Temporary Staff Fees - Administration												
<b>Salaries and wages</b>												
<b>Employee Benefits and Taxes</b>												
6021 Employer FICA												
6022 Unemployment Compensation												
6023 Worker's Compensation												
6024 Health Insurance Benefit - Kaiser Permanente												
6025 EAP Employee Assistance Program - First Choice												
6026 Life/AD&D LTD Insurance - NY Life												
6027 401k Plan Match - Empower												
6029 WA FLI/MLI												
6030 Other Benefits												
6031 Oregon State Worker's Benefit Funds												

## Saving the Template

- When the **template tab** is closed, your most recent inputs will automatically be saved. To save the data without closing the template tab click the **refresh icon** in the toolbar. 
- Data that has been inputted but has not been saved by clicking the refresh icon or by closing the template tab will **not** be saved if the **Prophix browser tab** is exited or if the browser is refreshed. Ensure that after entering data you close the template tab or click refresh before exiting Prophix.

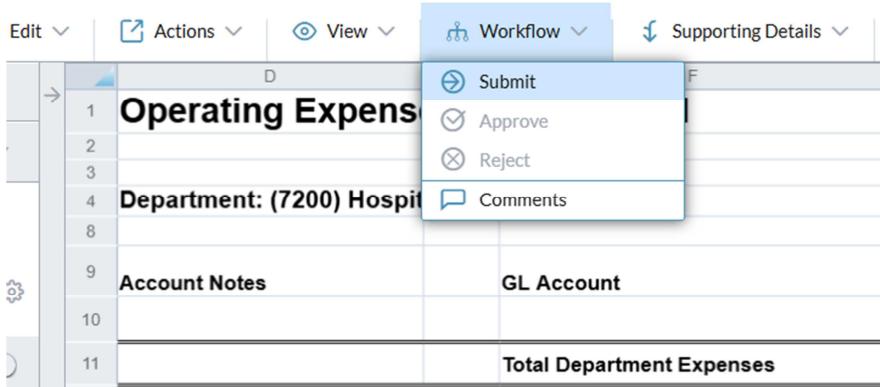
**Prophix Browser Tab**



The screenshot shows a browser window with the URL <https://nwkidney.usc.prophix.cloud/Template/Task/174>. The tab title is 'Position FTE Planning Template'. The browser toolbar includes a refresh icon. The main content is a template task for 'Operating Expenses - Clinical' with a department of '(10) Home'. The template includes columns for 'Account Notes' and 'GL Account', and rows for 'FTE' and '# of Treatments'. The right side of the screen shows a financial summary table with columns for 'FY2024 - Actual', 'FY2025 - Budget', 'YTD', 'Trailing 12', 'FY2025 YTD', 'Trailing 12', 'FY2026 Budget', and 'Current vs FY2025 Budget'. A 'Refresh Icon' is highlighted in the top right corner of the browser window.

## Submitting completed Workflow Tasks

- Once data entry is complete, select Workflow from the Toolbar → Submit
- Submitting will mark this task as “Submitted” in the My Task section of your dashboard and make it inaccessible for further editing. If there is an approver for this task, once submitted the task will be sent to the Approver for rejection or approval. If a task is rejected it will reappear under My Tasks as “Work in Progress” so that the required edits can be made.



The screenshot shows the 'Workflow' dropdown menu open, with the 'Submit' option highlighted. The menu also includes 'Approve', 'Reject', and 'Comments' options. The background shows a template task for 'Operating Expenses' with a department of '(7200) Hospital'.

## Primary Approval Tasks

- Tasks labelled as “**OpEx Planning – Manager’s Name**” are tasks that you are the Primary Approver of and are responsible for reviewing and approving or rejecting.
- When you open the task as the primary approver you will only be able to see the Departments that the individual identified in the Task Name is responsible for.
- For example, the primary approver on the task “OpEx Planning – Michael Scott”, will only see Michael’s departments and will be responsible for reviewing these sheets and approving or rejecting them

My Tasks		
 OpEx Input- Dept: 6151 - Pam Beasley	Work in progress	Apr 30, 2025
 OpEx Planning - Michael Scott	Work in progress	Apr 30, 2025
 OpEx Secondary Approval: Dept. 6186 - Jim Halpert	Work in progress	Apr 30, 2025

My Favorites		
 Operating Expenses - Clinical	Date added: Jan 15, 2025	

- After reviewing all available departments select Workflow in the Toolbar → Approve or Reject
- **\*Note:** Approvers can make edits to the template before approving or rejecting.

## Secondary Approval Tasks

My Tasks		
 OpEx Input- Dept: 6151 - Pam Beasley	Work in progress	Apr 30, 2025
 OpEx Planning - Michael Scott	Work in progress	Apr 30, 2025
 OpEx Secondary Approval: Dept. 6186 - Jim Halpert	Work in progress	Apr 30, 2025

My Favorites		
 Operating Expenses - Clinical	Date added: Jan 15, 2025	

- Tasks labelled as “**OpEx Secondary Approval: Dept. #### – Manager’s Name**” are tasks that you are the Secondary Approver of and are responsible for reviewing and approving.
- **\*Note-**These tasks will appear as Overdue on your Dashboard. Please ignore the deadlines on secondary approval tasks
- When you open the task you will only be able to see the Departments that the individual identified in the Task Name is responsible for.
- After reviewing all available departments select Workflow in the Toolbar → Approve or Reject