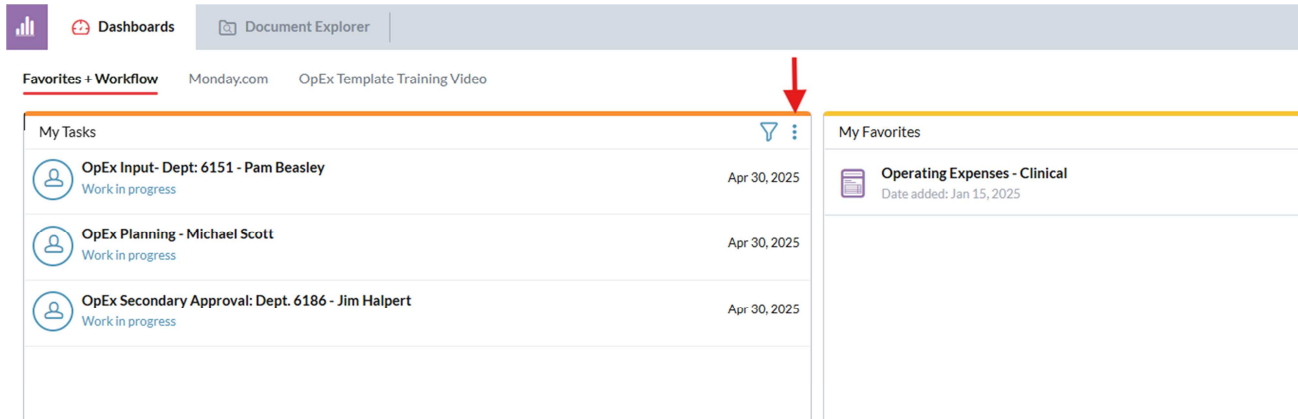



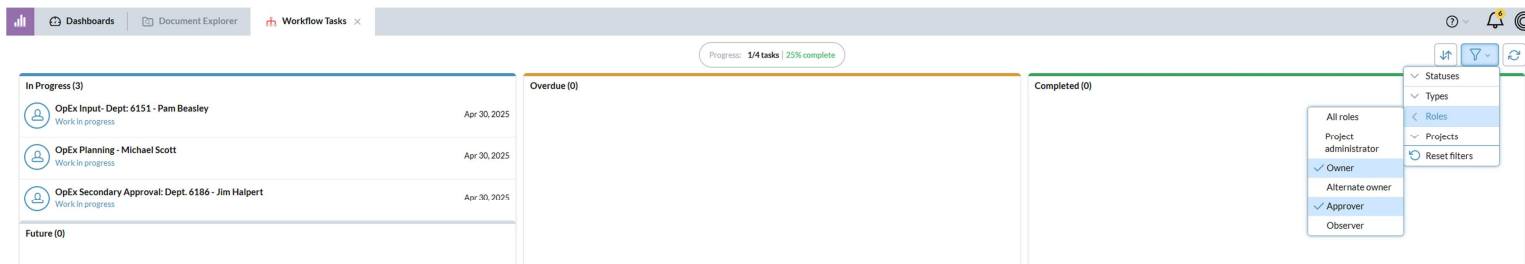
Data Entry Template – Online Data Entry

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.



- 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)



Data Entry as Task Owner

Favorites + Workflow Monday.com OpEx Template Training Video



- 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.**

Operating Expenses - Clinical					
Department: (10) Home					
Account Notes	GL Account	FY2024 - Actual	FY2025 - Budget	YTD Jul'24 - Feb'25	
Total Department Expenses					
Employee Expenses					
Value of worked hours	6000 Salary & Wages				
Over Time	6001 Premium OT				
-	6002 Non Care Salary and Wages				
Amount of actual paid time off taken	6005 Salary Non Work Time/PTO				
Fees for Temporary Staff in the Clinics	6130 Temporary Staff Fees - Clinical				
Fees for Temporary Staff in Administration	6131 Temporary Staff Fees - Administration				
-	Salaries and wages				
Employee Benefits and Taxes					
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

Operating Expenses - Clinical							
Department: (10) Home							
Account Notes	GL Account	FY2024 - Actual	FY2025 - Budget	YTD Jul'24 - Feb'25	Trailing 12 Mar'24 - Feb'25		FY2024
# of Treatments							
FTE							
Total Department Expenses							\$
Employee Expenses							
Value of worked hours	6000 Salary & Wages						\$
Over Time	6001 Premium OT						\$
-	6002 Non Care Salary and Wages						\$
Amount of actual paid time off taken	6005 Salary Non Work Time/PTO						\$
Fees for Temporary Staff in the Clinics	6130 Temporary Staff Fees - Clinical						\$
Fees for Temporary Staff in Administration	6131 Temporary Staff Fees - Administration						\$
-	Salaries and wages						\$

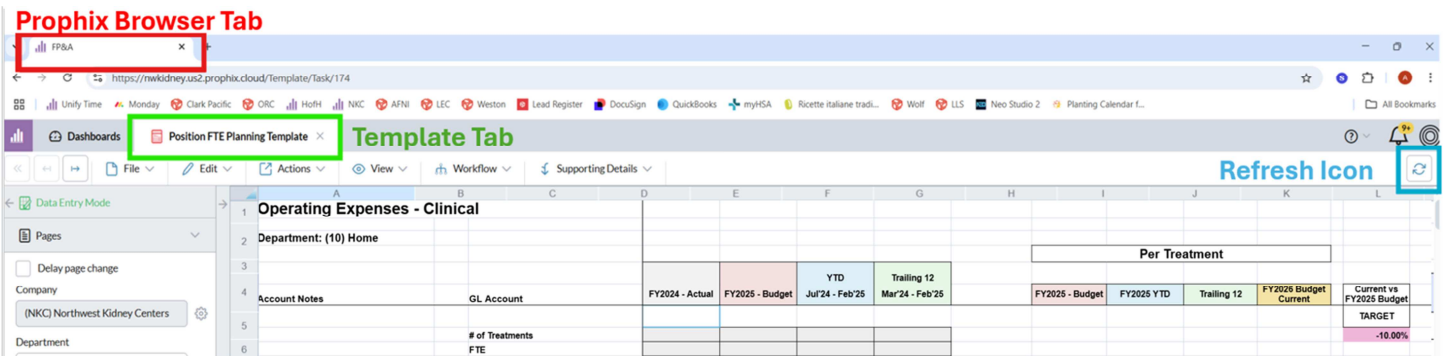
- The next section displays the Expense per Treatment for each of the historical time periods (Columns L-N), as well as for the inputted Budget (Column O).

- | Clinical | | F | H | I | J | K | L | M | N | O | P | Q | R |
|---------------------------|---------------------------------------|-----------------|------------------------|--------------------------------|---|---|-----------------|------------|-------------|--------------------------|---|-----------------------------|---|
| | | Per Treatment | | | | | | | | | | | |
| GL Account | | FY2025 - Budget | YTD
Jul'24 - Feb'25 | Trailing 12
Mar'24 - Feb'25 | | | FY2025 - Budget | FY2025 YTD | Trailing 12 | FY2026 Budget
Current | | Current vs
FY2025 Budget | |
| | | | | | | | | | | | | TARGET | |
| # of Treatments | | | | | | | | | | | | -10.00% | |
| FTE | | | | | | | | | | | | | |
| Total Department Expenses | | | | | | | \$ - | \$ - | \$ - | \$ - | | 0.00% | |
| Employee Expenses | | | | | | | | | | | | | |
| 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% | |
| | Salaries and wages | | | | | | \$ - | \$ - | \$ - | \$ - | | 0.00% | |

- [illegible]

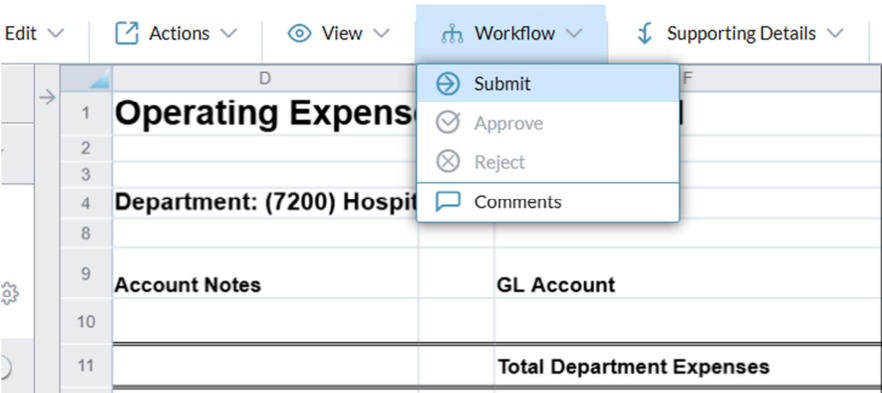
Saving the Template

- 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.







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.







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	My Favorites
<div>  OpEx Input- Dept: 6151 - Pam Beasley Work in progress </div> <div>  OpEx Planning - Michael Scott Work in progress </div> <div>  OpEx Secondary Approval: Dept. 6186 - Jim Halpert Work in progress </div>	<div>  Operating Expenses - Clinical Date added: Jan 15, 2025 </div>

- 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	My Favorites
<div>  OpEx Input- Dept: 6151 - Pam Beasley Work in progress </div> <div>  OpEx Planning - Michael Scott Work in progress </div> <div>  OpEx Secondary Approval: Dept. 6186 - Jim Halpert Work in progress </div>	<div>  Operating Expenses - Clinical Date added: Jan 15, 2025 </div>

- 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