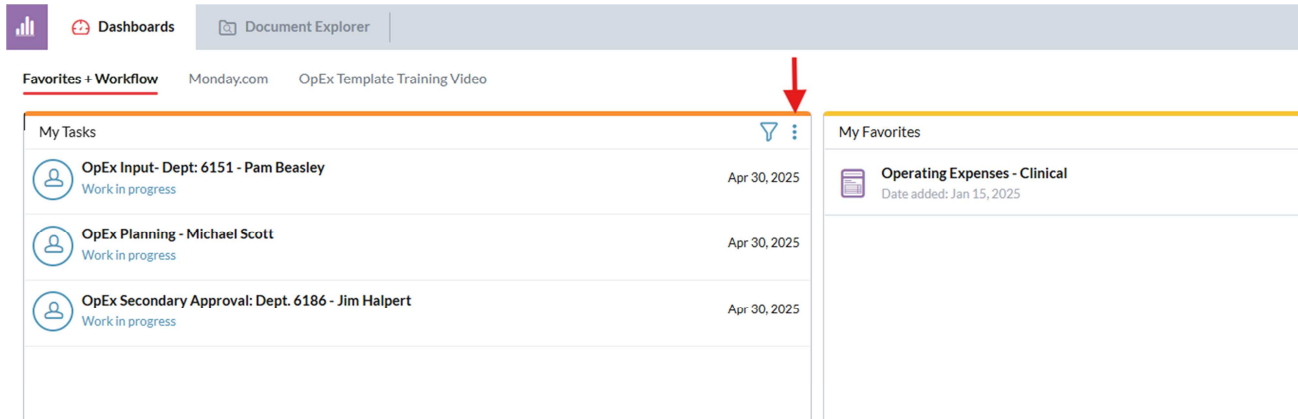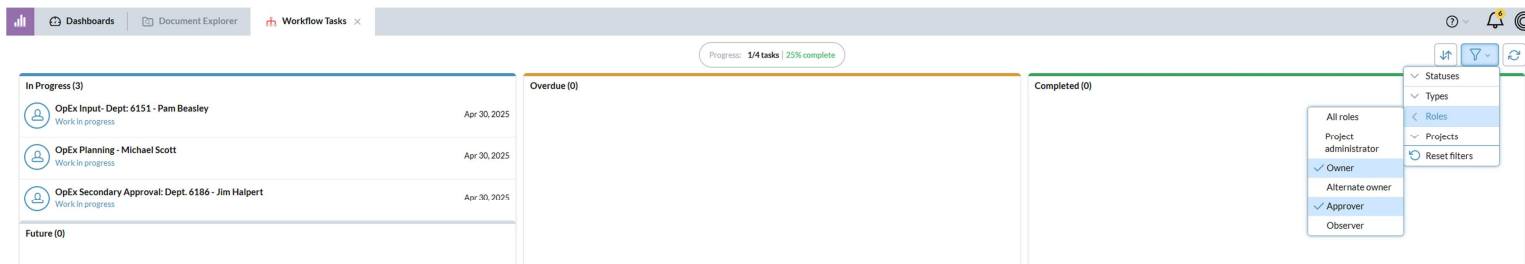**Data Entry Template – Online Data Entry**

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

- 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 - Non Clinical

Department: (7200) Hospitals & Other

Department dropdown panel (Pages window):
- Data Entry Mode
- Pages
- Delay page change
- Department: (7200) Hospitals & Other
- Search
  - (7200) Hospitals & Other
  - (7404) Quitodian Research Stu…
  - (7428) Open Label Calclmem S…
  - (7436) Lam IV Study
  - (7438) Peg Hirndin
  - (7443) Aksys Feasibility Study
  - (7444) Eschbach Iron Study
  - (7445) Pamidronate Study
  - (7447) Open Label 158 Study
  - (7449) AKSYS-2
- Auto refresh
- View Indicators

Account Notes	GL Account		FY2024 - Actual	FY2025 Budget
		Total Department Expenses		
		Salaries and Wages		
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		
Employer portion on unemployment compensation insurance	6022	Unemployment Compensation		
Employer portion on worker's				

- 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 and H
  - G: Prior Year Actuals
  - H: Current Year Budget

Operating Expenses - Non Clinical

Department: (7200) Hospitals & Other

**Enter Data in yellow ce…
**Gray cells are uneditab…

Account Notes	GL Account		FY2024 - Actual	FY2025 Budget		$ FY2025 vs FY2026 Budget Current	% FY2025 vs FY2026 Budget Current	Current vs FY2025 Budget TARGET		FY2026 Budget Current	Jul FY26	Au…
		Total Department Expenses				$ -	0.00%	-10.00%				
		Salaries and Wages										
Value of worked hours	6000	Salary & Wages				$ -	0%					
Over Time	6001	Premium OT				$ -	0%					
-	6002	Non Care Salary and Wages				$ -	0%					
Amount of actual paid time off taken	6005	Salary Non Work Time/PTO				$ -	0%					
Fees for Temporary Staff in the Clinics	6130	Temporary Staff Fees - Clinical				$ -	0%					
Fees for Temporary Staff in Administration	6131	Temporary Staff Fees - Administration				$ -	0%					
-		**Salaries and wages**				$ -	0%					
		Employee Benefits and Taxes										
Employer portion of Social Security (6.2%) and Medicare (1.45%) payroll taxes	6021	Employer FICA				$ -	0%					
Employer portion on unemployment compensation insurance	6022	Unemployment Compensation				$ -	0%					
Employer portion on worker's												

- The next section displays the variance between the inputted Budget (Column O) and the current year Budget (Column H) both as a dollar amount and a percentage.
  - A Target variance of -10% is indicated on the template

- 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 O.
- Grey cells are uneditable as the values are derived from the Personnel Model
- *****Ensure you fill out data for all Departments in the template**

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

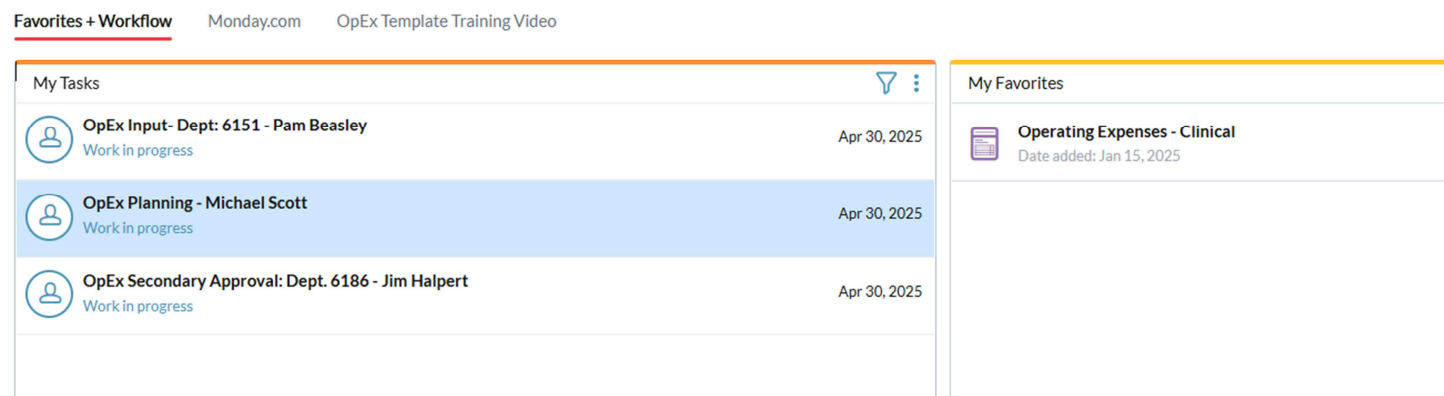- Once data entry is complete, select Workflow from the Toolbar→ Submit

- 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

- After reviewing <u>all available</u> 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		𝘠 ⋮	My Favorites	
👤	**OpEx Input- Dept: 6151 - Pam Beasley** Work in progress	Apr 30, 2025	📄	**Operating Expenses - Clinical** Date added: Jan 15, 2025
👤	**OpEx Planning - Michael Scott** Work in progress	Apr 30, 2025		
👤	**OpEx Secondary Approval: Dept. 6186 - Jim Halpert** Work in progress	Apr 30, 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