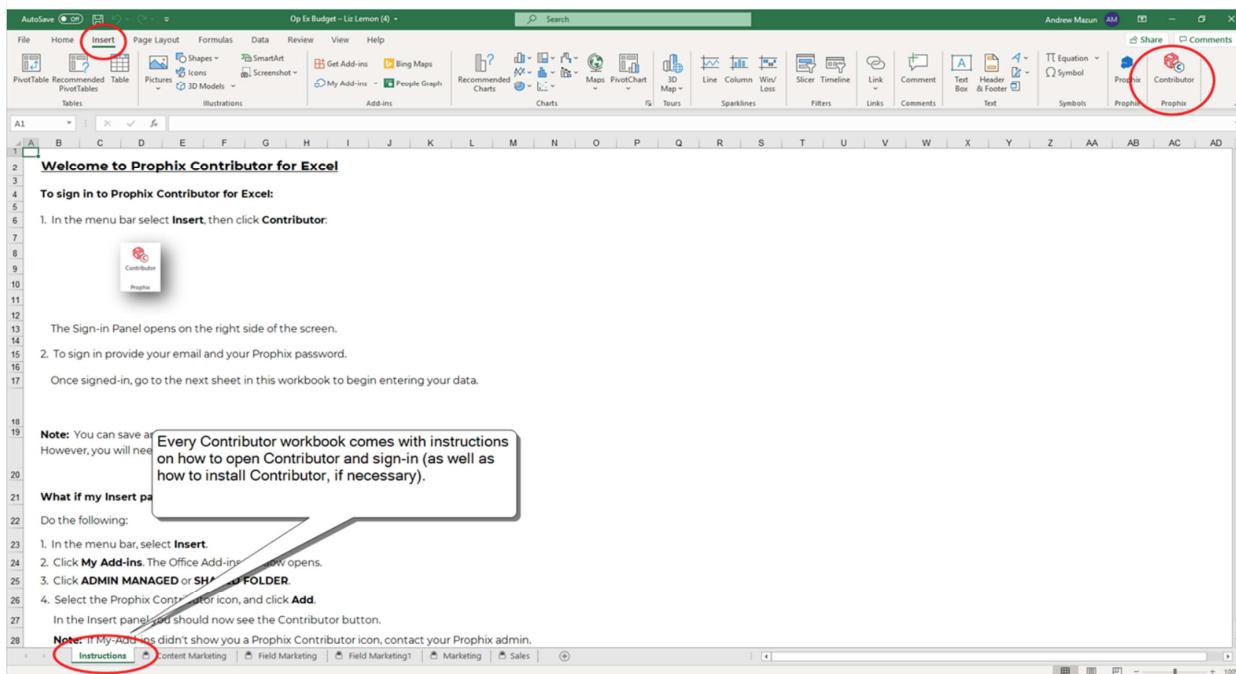


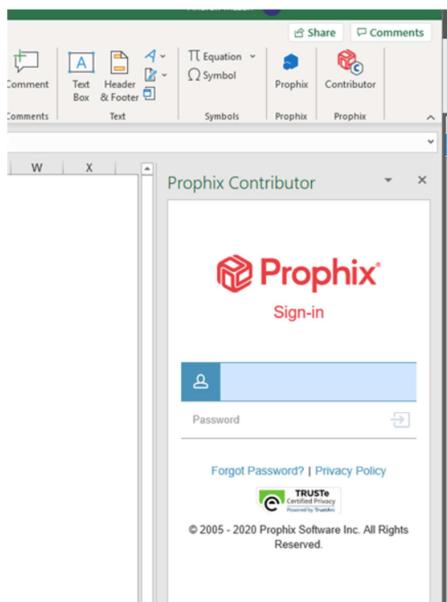
## Data Entry Template – Prophix Excel Contributor

### Accessing Templates

- When your Prophix workflow Task has started you will receive a notification email. Click the link in the email and then select **Download**.
- Open the downloaded workbook in Excel.
- The first page of the template contains instructions for how to open Prophix Contributor.



- Sign in on the Contributor panel.



## Data Entry as Task Owner

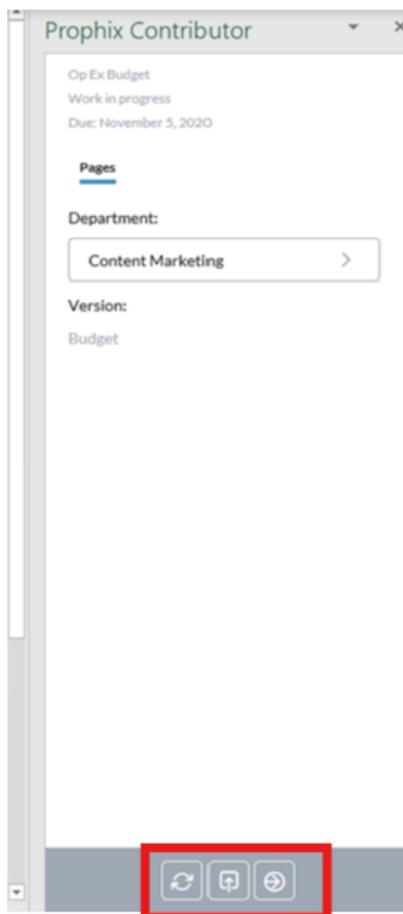
- Tasks labelled as “**Position FTE Input - Dept.#### – Your Name**” are tasks that you are the owner of and are responsible for completing the FTE data entry for.
- **\*Note-Fill out the FTE data only for the departments listed in the task name.**
- Only the yellow cells in the template are editable.
- The first section displays Baseline FTE values that are based off the current roster as a reference.
- The bottom section is where you will fill out the Requested Change in FTE by Position. Input the values only in the first month they will be applied. In the below example, 2 Accounting Specialists will be hired in July, and 1 Admitting Intake Specialist will be hired in October.

- In Column O there are cells available to add a Justification or New Position Name for your entered FTE Changes

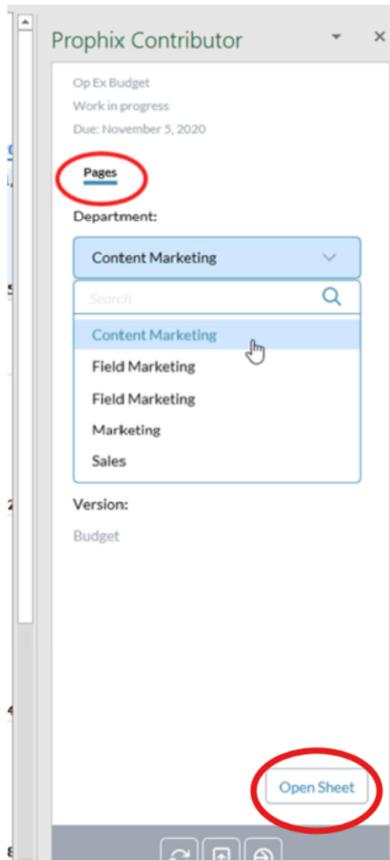
- If you need to add FTE's to a new Position that isn't listed on the template, use the generic rows for "New Position" to enter the data. Ensure you include the name of the position in Column O

165 VR Patient Care Servs/Unier nursing Officer																			
166 Warehouse Operations Manager																			
167 New Position 1																			
168 New Position 2																			
169 New Position 3																			
170 New Position 4																			
171 New Position 5																			
172 All																			
173																			

- Click the Save icon  in the Contributor panel to save the entered FTE data and commit it to the model in Prophix.
- The middle section in green shows a summary of the Baseline FTE with the Requested Changes applied. Your entered Change in FTE data will only be reflected in this section for newly added positions after you save the template and redownload it from the notification email.
- The Refresh icon  will refresh the data from the model in Prophix. Ensure you save your changes before refreshing.



- You can navigate between Sheets/Departments as you would in Excel, or you can use the Pages dropdown in the Contributor panel. Choose the Department and then click “Open Sheet”



- Once you have completed your data entry for all Departments, you can Submit your workflow task by clicking the Submit icon  in the Contributor panel.
- Once a task is submitted you will no longer have access to the template to make changes. If a task is submitted in error and further edits are required, contact your Prophix Administrator.
- A submitted task will be passed on to the Approver for approval or rejection. If the task is approved, it is marked as Completed and no further action is required. If the task is rejected, you will receive an email notification and be required to make any necessary changes and then resubmit the task.

## Primary Approval Tasks

- Tasks labelled as **“Position FTE 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 “Position FTE Planning – Michael Scott”, will only see Michael’s departments and will be responsible for reviewing these sheets and approving or rejecting them
- After reviewing all available departments select the Approve or Reject Icon in the Contributor Panel

- **\*Note:** Approvers can make edits to the template before approving or rejecting.

