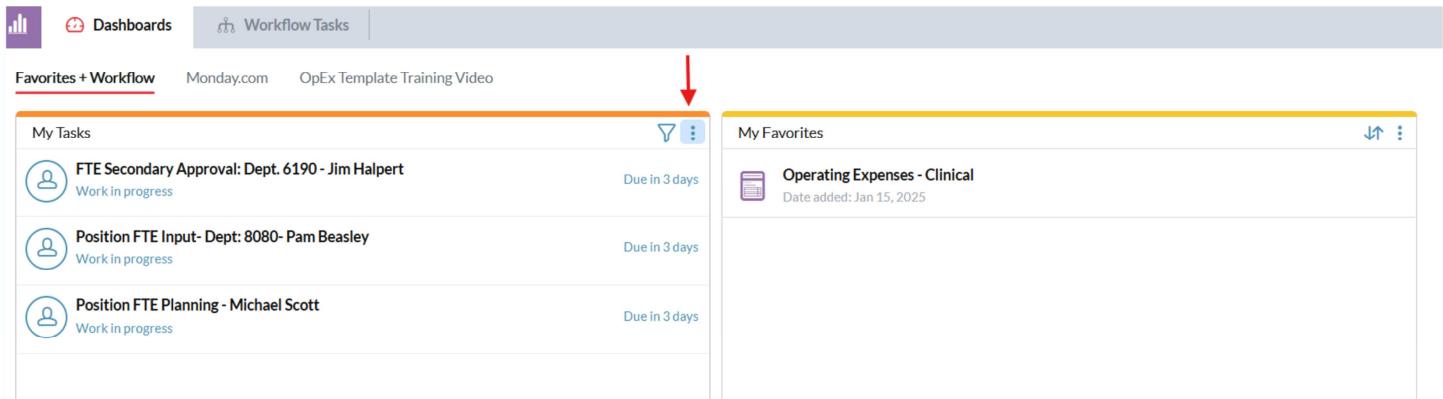


# FTE Planning Template – Online Data Entry

## 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.



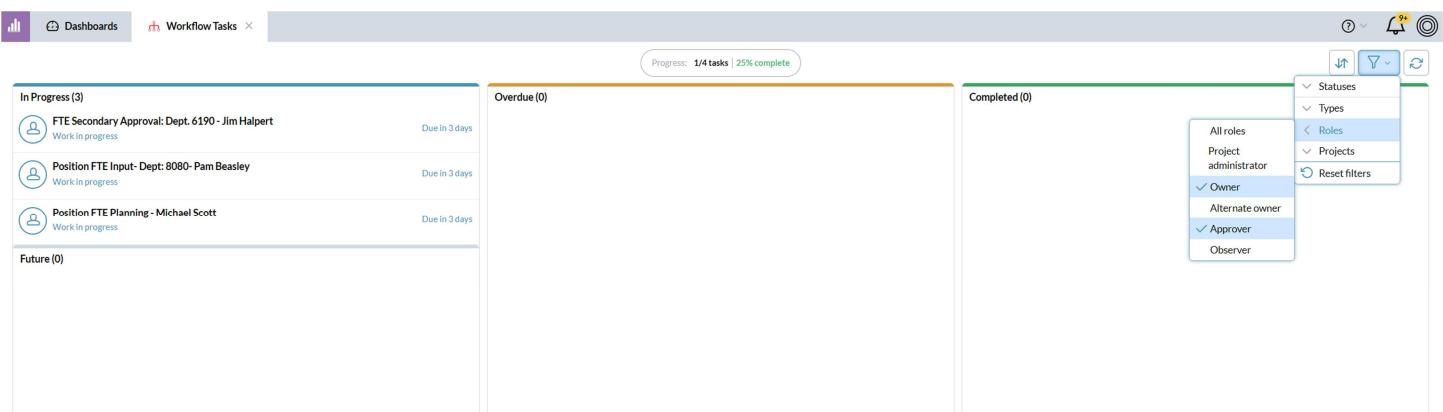
The screenshot shows the Prophix dashboard with the 'Dashboards' tab selected. The 'My Tasks' section contains three items:

- FTE Secondary Approval: Dept. 6190 - Jim Halpert (Work in progress, Due in 3 days)
- Position FTE Input- Dept: 8080- Pam Beasley (Work in progress, Due in 3 days)
- Position FTE Planning - Michael Scott (Work in progress, Due in 3 days)

A red arrow points from the 'My Tasks' section to the 'My Favorites' panel on the right, which lists:

- Operating Expenses - Clinical (Date added: Jan 15, 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)

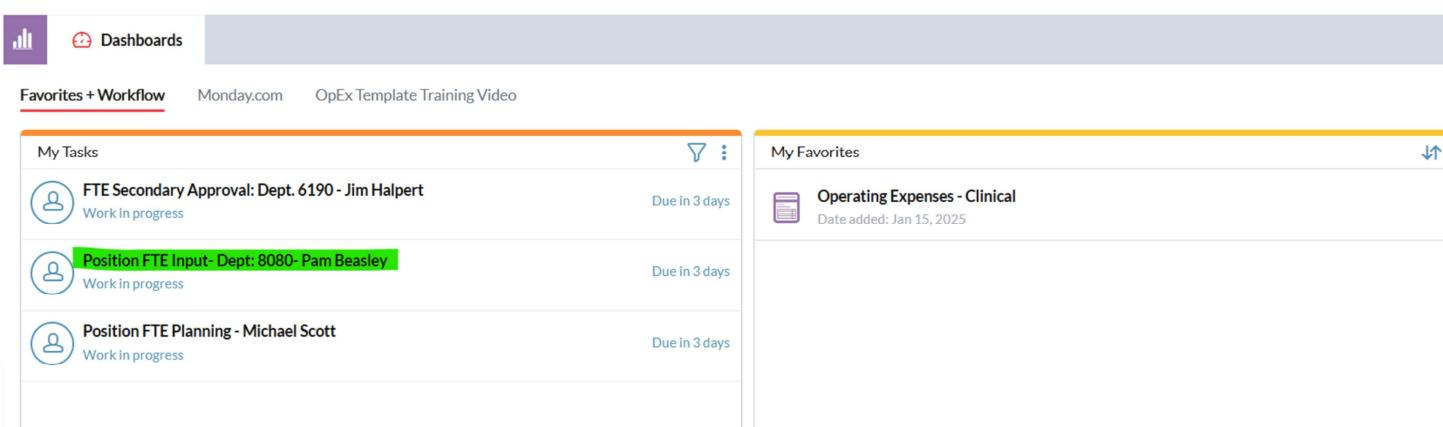


The screenshot shows the Prophix dashboard with the 'Dashboards' tab selected. The 'My Tasks' section is filtered by the 'Owner' role, showing:

- In Progress (3): FTE Secondary Approval: Dept. 6190 - Jim Halpert (Work in progress, Due in 3 days), Position FTE Input- Dept: 8080- Pam Beasley (Work in progress, Due in 3 days), Position FTE Planning - Michael Scott (Work in progress, Due in 3 days)
- Overdue (0)
- Completed (0)

A filter menu on the right is open, showing the 'Owner' role selected under 'Roles'.

## Data Entry as Task Owner



The screenshot shows the Prophix dashboard with the 'Dashboards' tab selected. The 'My Tasks' section contains three items, with the second item highlighted in green:

- FTE Secondary Approval: Dept. 6190 - Jim Halpert (Work in progress, Due in 3 days)
- Position FTE Input- Dept: 8080- Pam Beasley** (Work in progress, Due in 3 days)
- Position FTE Planning - Michael Scott (Work in progress, Due in 3 days)

The 'My Favorites' panel on the right lists:

- Operating Expenses - Clinical (Date added: Jan 15, 2025)

- 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.
- When you click on the task it will open the template for data entry. **Fill out the FTE data only for the departments listed in the task name.**
- Once the template is open, use the Department dropdown menu in the Pages window to select the department listed in the task name.

Dashboard: Position FTE Planning Template

Actions: Edit, View, Workflow, Supporting Details

Data Entry Mode: Pages, Delay page change, Company (NKG) Northwest Kidney Centers

Department: (10) Home, Search, (10) Home, (1250) Inventory Non Medical S..., (1251) Inventory Medical Suppl..., (1253) Inventory Hskping Suppl..., (1254) Inventory Minor Equipm..., (1255) Inventory Repair Parts, (1256) Inventory Dietary Supls, (1257) Inventory Office Supls, (1258) Inventory Bldg Supplies, (1260) Inventory Water Trmt S... Version: (BUD26) Budget 2026

Position FTE Planning Template

(10) Home      Budget 2026

Baseline FTE (Based off Current Roster)

	FTE	FTE	FTE	FTE	FTE
2026	Jul FY26	Aug FY26	Sep FY26	Oct FY26	

Proposed FTE (after requested Additions/Reductions)

	Total FTE				
2026	Jul FY26	Aug FY26	Sep FY26	Oct FY26	

Requested Change in FTE in Hire/Termination Month

\*Input change in FTE in the first month it will be applied

	Change in FTE				
2026	Jul FY26	Aug FY26	Sep FY26	Oct FY26	

Accounting Specialist  
Admitting Intake Specialist  
Associate Chief Nursing Officer  
Benefit Administrator  
Billing Supervisor  
Biomedical Engineering Supervisor  
Biomedical Engineering Technician

- 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

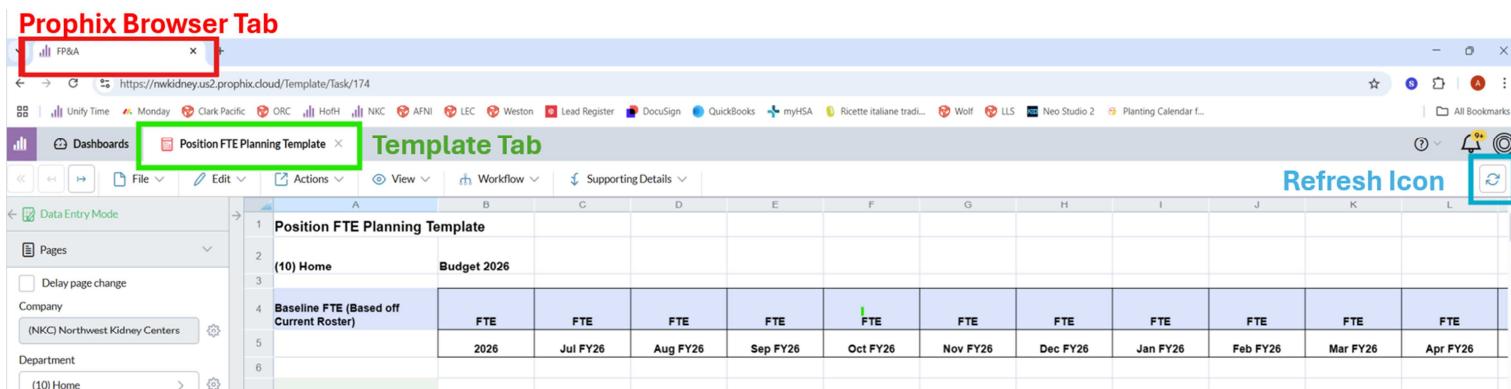
- If you need to add FTE's to a new Position that isn't listed on the template, use the generic rows for "New Position" to enter the data. Ensure you include the name of the position in Column O

165	VP Patient Care Servs/Chief 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							

- The middle section in green shows a summary of the Baseline FTE with the Requested Changes applied. Your entered FTE data will only appear in this section after you save the template.

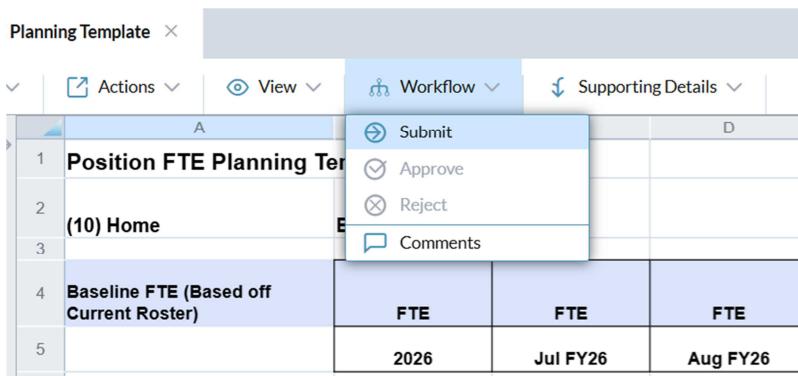
## Saving the Template

- 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

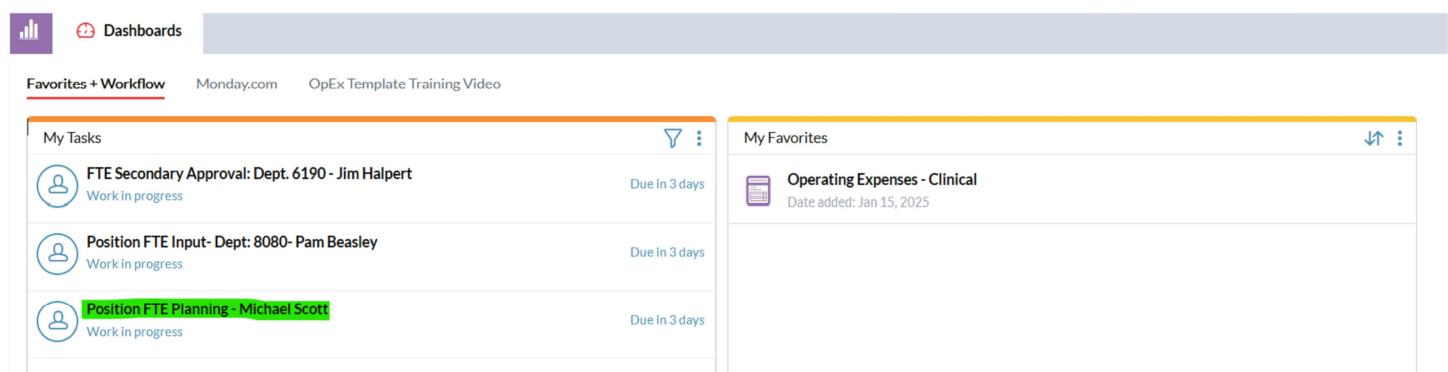
- Once data entry is complete, select Workflow from the Toolbar → Submit
- Submitting will mark this task as “Submitted” in the My Task section of your dashboard and make it inaccessible for further editing. If there is an approver for this task, once submitted the task will be sent to the Approver for 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.



The screenshot shows a spreadsheet application with a 'Planning Template' sheet. The 'Workflow' toolbar is open, displaying four options: 'Submit', 'Approve', 'Reject', and 'Comments'. The 'Approve' option is currently selected. The spreadsheet contains several rows of data, including 'Position FTE Planning' and 'Baseline FTE (Based off Current Roster)'.

## Primary Approval Tasks

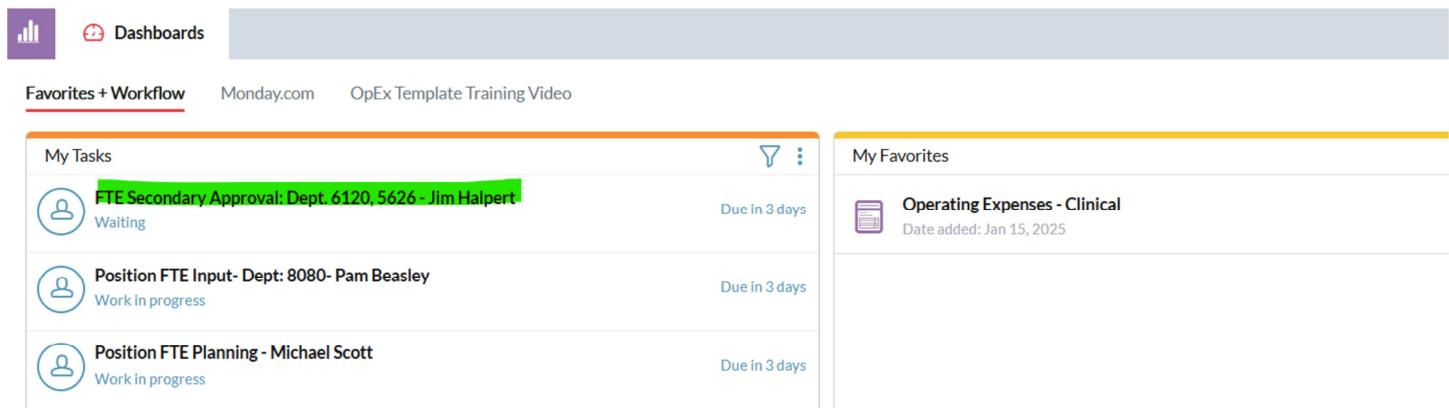
- Tasks labelled as “**Position FTE Planning – Manager’s Name**” are tasks that you are the Primary Approver of and are responsible for reviewing and approving or rejecting.
- When you open the task as the primary approver you will only be able to see the Departments that the individual identified in the Task Name is responsible for. In the below 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 pages and approving or rejecting them.



The screenshot shows the Monday.com dashboard. The 'My Tasks' section lists three tasks: 'FTE Secondary Approval: Dept. 6190 - Jim Halpert' (Work in progress, Due in 3 days), 'Position FTE Input- Dept: 8080- Pam Beasley' (Work in progress, Due in 3 days), and 'Position FTE Planning - Michael Scott' (Work in progress, Due in 3 days). The 'My Favorites' section lists one item: '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



The screenshot shows a Monday.com dashboard with the following interface elements:

- Header:** Favorites + Workflow, Dashboards, Monday.com, OpEx Template Training Video.
- Left Sidebar:** My Tasks
- Task List:**
  - FTE Secondary Approval: Dept. 6120, 5626 - Jim Halpert** (highlighted in green)  
Waiting  
Due in 3 days
  - Position FTE Input- Dept: 8080- Pam Beasley**  
Work in progress  
Due in 3 days
  - Position FTE Planning - Michael Scott**  
Work in progress  
Due in 3 days
- Right Sidebar:** My Favorites
  - Operating Expenses - Clinical**  
Date added: Jan 15, 2025

- Tasks labelled as “**FTE 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