



University of Washington

FY2027 UW Academy Operating Budget Development Process Guide

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1.0 Change Log

Version	Release Date	Major Changes
2025-12-01	12/01/2025	Original document release
2025-12-10	12/10/2025	Updated Financial Book language to clarify common book will be used for planners

2.0 Introduction

On October 16, 2025, Provost Serio sent a [preliminary kickoff letter](#) and followed with an announcement on December 1, 2025 formally commencing a dialogue with faculty, staff, and students about institutional needs, resource constraints, and priorities. These communications outline the Provost’s focal points and relevant deadlines for the FY27 annual operating budget development process.

This process guide is intended to be a consolidated general resource to assist units in the preparation and submission of required materials. This process guide is not intended to serve as end-to-end training for the Workday Adaptive Planning tool. Similarly, it does not provide comprehensive guidance for every specific business planning situation.

The Budget Planning & Operations (BPO) team is available throughout this process to offer support to campuses and units as necessary to ensure submitted budget materials are representative of unit operations, opportunities, and challenges. Additionally, several new job aids and training materials are available on the [UW Connect Financial Portal](#) and on FPB’s [FY27 Operating Budget Materials website](#).

Finance leads for major organizations (e.g., those who report directly to a dean, vice-president, vice-provost, or chancellor) and their delegates are responsible for providing local unit and department specific guidance to planners beyond what is available in this guide. Guidance on local planning processes within each major organization may have different internal steps or deadlines necessary to achieve alignment with the enterprise guidance referenced within this document.

3.0 Items Requiring Completion

The annual operating budget development process will require several submissions from UW Academy units. Required items are listed below in the order they are due. Templates and links to the associated submission forms are on FPB’s [FY27 Operating Budget Materials website](#).

Date	Milestone(s)	Applicable to
12/1/2025	FY27 Operating Budget cycle commences: Planning guidelines and assumptions available Faculty Hiring Plan Portal opens for drafting and submission of AY2025-26 hiring reports and AY2026-27 hiring plans	UW Academy Units
1/30/2026	Rate recommendations for tuition and fee-based programs, enrollment projections for tuition-based programs, and accompanying narrative due	UWS Academic Units, UW Bothell, & UW Tacoma
2/2/2026	AY2026-27 Faculty Hiring Plan and AY2025-26 Hiring Report submissions due	UWS Academic Units, UW Bothell, & UW Tacoma

Date	Milestone(s)	Applicable to
2/23/2026	Operating budget proposals, narrative responses and PRF requests (UWS) due	UW Academy Units
March 16 – April 3, 2026	Budget conferences w/Chancellors, Deans & VPs	UW Academy Units
Late April 2026	Operating Budget & Faculty Hiring Plan decisions communicated	UW Academy Units
Late April - Early May 2026	Final adjustment window to FY27 Operating Budget proposals	UW Academy Units
June 2026	Regental action on FY27 Operating Budget	UW Academy & UW Medicine

4.0 Material Process or Requirement Changes for the FY2027 Cycle

4.1. Evergreen Version

This year, the FPB team has introduced a new feature in the Adaptive Planning tool that allows campuses and units to begin planning earlier by using the “UWA Evergreen Budget and Forecast Entry” version. The Evergreen version in Adaptive is now the default, unlocked version for all budget and forecasting entries, and it will serve as the official version for the FY27 operating budget. Unlike previous years, no new version will be created or released for planning; users will continue working in the same Evergreen version throughout the entire budget cycle.

4.2. Financial Book

Financial Book budgeting will be required for FY27 at the Enterprise Level. The Financial Book includes both the Common Book code and the Asset Book code. For FY27, budgeting for assets in the Common Book will not change for Units. However, Units will need to use a template provided by the Controller’s Office to calculate depreciation for planned asset purchases. Once calculated, the depreciation amount must be entered into a new Depreciation Sheet in Adaptive. During this transition, we are asking planners to incorporate depreciation expenses that will support enterprise consolidation using the Financial Reporting Book. Unit budget plans, targets and net position will continue to be measured using the Common Book during this transitional period. The longer-term goal for the FY28 budget cycle will be to fully incorporate the Financial Reporting Book items into Adaptive including asset and debt balance sheet items.

4.3. Preliminary Benefit Load Rates (BLR)

In the past, prior-year BLRs were used as assumptions for the following fiscal year because MAA provided the rates much later than the start of the Budget Development Cycle. Beginning with FY27 and going forward, MAA will provide preliminary rates before the Budget Development Cycle begins. These preliminary rates will be entered into Adaptive by December 1 and will differ from the rates currently in effect for FY26.

4.4. Live Net Position

Last year, BPO introduced Net Position in reports and the auto calculation of several Core Funded revenues in Adaptive Planning. The totals for these revenues and net position were calculated overnight making it

difficult to observe the impacts of changes in real time while budgeting. New this year, net position and associated automatic funding transfers will occur and be visible in reports as soon as changes are saved.

4.5. Focus on Cost Containment, Revenue Enhancement, and Net Position

To address the ongoing challenge of UW operating expenses outpacing revenue growth, all budget proposals and forecasts must reflect break-even or better financial performance across each Cost Center hierarchy 05 and the associated GOF (non-proviso), DOF, Proviso, and Auxiliary resource hierarchies.

If a unit or campus plans to use core or auxiliary net position, the budget narrative must clearly explain whether this reflects a strategic investment or a structural revenue/expense imbalance. Strategic uses should include investment details and expected outcomes; imbalances must be accompanied by a plan for rapid remediation. The use of net position will be a key discussion point in budget meetings with the President and Provost.

4.6. Further Alignment of Faculty Hiring Plan and the Annual Budget Development Processes

Finance, Planning & Budgeting has partnered with the Office for Academic Personnel & Faculty to more closely integrate the operating budget development process with the faculty hiring plan process. Academic year 2026-27 faculty hiring plan proposals must be included in the financial plans of your unit to receive consideration. AY2026-27 hiring plan proposals and AY2025-26 hiring plan reports will be considered alongside the financial performance of the unit during the annual review meeting in the spring of 2026. See section 7.2 below for more detail on the Adaptive entry requirements which uses a new, dedicated sheet for these entries this year. Contact your Dean's, VP's or Chancellor's office with questions about the Faculty Hiring Plan.

5.0 General Adaptive Requirements and Guidelines

5.1. Minimum Level of Detail Required

To ensure that plan entry data in Adaptive achieves a minimum level of consistency across the UW Academy, the following FDM worktags are required on the various sheets within Adaptive.

- Sheet 1 – Cost Center (Transfer To), Resource, GL:RC:SC, Cost Center (Transfer From)
- Sheet 2 – Cost Center, Resource, GL:RC:SC
- Sheet 4 – Cost Center, Resource, GL Account, and either Position or Position_Type_Adaptive_Only for yet to be hired positions (except for Hiring Plan) that do not have a Position ID in Workday HCM.
- Sheet 5 – Cost Center, Resource, GL Account
- Sheet 6 – Cost Center, Resource, GL:RC:SC
- Sheet 9 – Cost Center, Resource, Hiring Plan Position ID, GL:RC:SC

In addition, unit entries should be at the level of detail necessary for consistent and prudent month-to-month management of financial activity – which may or may not be the same level as required above. Unfavorable variances to budget in FY27 will require unit action.

5.2. Maximum Level of Detail Available

In addition to the required data elements described above, Adaptive planning allows planners to use several optional worktags to ensure effective and reliable management reporting, decision making, and budget monitoring for their units.

Additional Foundation Data Model (FDM) worktags available for planning included on all sheets:

- Program
- Activity
- Assignee
- Gift
- Grant (both stand-alone and sponsored)

For compensation planning on sheets 4 and 5, there are optional HCM worktags available.

Based on Position number, the following values are automatically updated roughly twice per month after each allocation update period from Workday HCM:

- Sheet 4: Worker ID, Job Profile HRP, Job_Family_03_Enterprise, Service Period, HRP Full Time Rate
- Sheet 5: Worker ID, Job Profile HRP, Job_Family_03_Enterprise

The following optional fields are **not** auto-populated on Sheets 4 and 5 from Sheet 3 Position Roster data:

- Worker – values are drop down list of current UW employees (Worker entries will drive Worker ID values based on the Worker ID associated with that Worker in Sheet 3 Position Roster.)
- Business Title – values are drop down list of current HCM business titles
- Job_Family_01 (auto-populated from the Job Profile field, but editable by planners) – values include Professional, Classified, Faculty – Annual or Shorter, Faculty – Indefinite and Multi-Year, etc.
- Pay Rate Type – values are salaried or hourly

Because of the way Sheet 4 calculates plan dollars based on a full-time monthly rate and a funding split %, Sheet 4 entries are only for those earnings commonly known as or referred to as “reg” pay. Sheet 5 allows users to add \$ plan entries for additional earning types like Overtime, Administrative Supplements (ADS), etc.

It is strongly suggested that planners evaluate the cost-benefit relationship in the level of detail included in forecasts and budget proposals and identify the right balance that facilitates internal campus/unit management reporting and accountability without being too administratively burdensome and complicated. As the FDM was designed with a significant degree of flexibility across business units, there is not a “one size fits all” approach that can be applied here.

5.3. Institutional Initiative worktag value IN100000 – Diversity Blueprint

Units and campuses should use the institutional initiative worktag (IN100000 UW Diversity Blueprint) to identify in their financial plan entries the resources intended to be deployed in support of the Diversity

Blueprint. Alignment with continual progress towards the goals and themes of the Diversity Blueprint is part of our core values at the UW. The purpose of this planning exercise is to allow campuses and units to begin to demonstrate where specific, direct, and identifiable investments are being made in support of this important effort.

This exercise does not require campuses and units to embark on a burdensome administrative process (i.e., cost allocating a % of each employee's time related to work delivering on the goals of the Diversity Blueprint). Because each of our campuses and units are taking locally meaningful and discipline-specific approaches to making progress, we expect that the FY27 planning cycle will be a continuation of work started in the FY25 cycle to increasingly improve our collective understanding of resource deployment, unit strategy, and the Diversity Blueprint.

A non-exhaustive list of items a campus or unit may wish to consider includes revenue and expenses related to employee training, major initiatives undertaken by campuses and units intended to further the themes and goals of the UW Diversity Blueprint, goods and services procured from vendors to remediate work product into accessible formats, approved distributions from the Provost Reinvestment Fund or ABB Values Pool Fund (UWS) that were tagged as proposals in support of the goals and objectives of the Diversity Blueprint when submitted, and equivalent central funding pools on the UWB and UWT campuses.

6.0 Suggested Approaches for Sheets and Dashboards

6.1. Utilize Dashboards

Dashboards are self-service, interactive visualizations of Adaptive Planning data. With dashboards, planners can enter data directly on sheets and on the same page dynamically see total data as well as charts update. Dashboards also enable planners to filter all sheets and charts simultaneously based on selected dimensions.

Using the UWA Planning Dashboard to enter plan data is strongly encouraged. Dashboards bring all the planning sheets into one location and combine them with the ability to see the resulting changes without running reports.

6.2. Utilize Display Options

In both Dashboards and Sheets, planners are encouraged to use Display Options to filter the view to manageable data sets and specific use cases by filtering sheet data by time (month, quarter, year), by row values (e.g., only showing certain cost centers or resource worktags or employee types), and hiding specific columns to prevent excessive scrolling from left and right. More detail is available in the [UW Connect Financial Portal](#)

6.3. Utilize adjust functionality

Because Adaptive will use values from the FY26 Adopted Budget version as baseline values for the FY27 Operating Budget Proposal version, planners may be able to save time by using the "Adjust" functionality of Adaptive's right click menu to change FY26 baseline values all at once. For example, a planner can adjust entries up or down by dollar amounts or percentages within the FY26 - FY31 timespan columns on an Adaptive entry sheet. More detail is available in the [UW Connect Financial Portal](#)

6.4. Utilize copy/paste functionality

Because data entry sheets in Adaptive function to some degree like an Excel workbook, manual entry can be reduced by utilizing copy/paste functionality within the tool. There are important sheet specific caveats to keep in mind when copying/pasting – especially large blocks of data – but, in general, developing facility here will make plan entry more efficient. More detail is available in the [UW Connect Financial Portal](#)

6.5. Take caution before using split row functionality for Position Planning and Core Revenue –

While planners can utilize Split Row functionality within these two Adaptive entry sheets, certain functionality is lost or limited when split rows are used.

Notably, display options on a sheet filter each row independently of the parent/child grouping. For example, if you use two different cost centers on the two child rows of a split, display options to filter for one of the cost centers will only result in showing you the one line with the cost center in your filter, not both, and not the parent line. As such, you may be unable to edit the child row when filtered in this way. Additionally, split rows make copy/pasting data more complex and difficult.

That said, split rows automatically sum timespan entries in child rows on the parent row and all entries are grouped together underneath the parent row. The UWA Planning Dashboard allows planners to view total compensation by dollars in the same place as the funding split percentages. This is a useful alternative to split rows. More detail is available in the [UW Connect Financial Portal](#)

6.6. Consider planning Gifts and/or Grants at a high level

In addition to the requirements noted in sections 5.1 and 5.2 above about the required and maximum level of detail for plan entries, planners may consider an alternative that consolidates gift and grant funding sources within a single representative worktag.

For example, units may find more value for effort in consolidating plan entry for gifts and grants to a single cost center or, for grant revenue, to a single ledger aligned with a single resource worktag instead of making the many different entries in every cost center, ledger, resource combination. While entering data for every combination of cost center, ledger and resource (i.e., fully distributed planning) utilizes the full functionality of hierarchy roll-ups, the actual plan data entry, training, and support for planners to use well each combination of worktags may be overly burdensome for the value gained in reporting.

Please note when using a consolidated plan entry approach rather than a distributed plan entry approach, that budget vs. actuals reports may not be valid at various worktag levels of detail (e.g., not all cost center and resource combinations could be run for a budget vs. actuals report). Therefore, units and campuses would need to run reports at hierarchy levels or with specific worktag combinations to find the valid budget to actual comparison. The potential limiting of departmental reports and decision making should be weighed against the data entry effort before pursuing this consolidated data entry approach.

6.7. Start early.

Not all approaches fit all business situations for all units. Starting as soon as you can gives planners flexibility to try alternate approaches to find the best fit for plan entry in time to use it well.

6.8. Worktag Placeholders for FDM values not yet created in Workday Financials

There may be times when planners wish to use a dimension value that has not yet been created in Workday – for example, to enter a plan value for an expected new program starting in a future fiscal year. To help with this process, there are single placeholder values available as shown below. When a new worktag value is expected to exist in Workday Financials in the future but does not yet exist in Workday Financials now, planners may use an appropriate placeholder value in Adaptive for planning. We highly recommend using a unique and consistent text identifier in the Notes column to (1) differentiate new worktag values and (2) assist in identifying plan values so the placeholder worktag value can be replaced with the actual worktag value if and when it is created in Workday Financials. New worktag values are available in Adaptive one day after they have been created in Workday Financials.

PG120557 Budget Placeholder - Program worktag
AC108187 Budget Placeholder - Activity worktag
GR005426 Budget Placeholder - Federal Grants worktag
GR005427 Budget Placeholder - State and Local Grants worktag
GR005428 Budget Placeholder - Non-Governmental Grants worktag
AS113106 Budget Placeholder – Assignee

NOTE: At this time, Cost Center does not have a placeholder value due to its use in security and access as Levels in Adaptive.

7.0 Compensation Planning Best Practices

7.1. Override Columns

Because plan entries may require different worktags in the future than are present now in HCM and auto-populated on Sheet 4 and Sheet 5, these sheets include override columns for planners to use a different worktag than what is presently in HCM.

- Override HRP Full Time Rate is used in calculating salary unless it is blank, in which case the HRP Full Time Rate is used instead.
- Job Profile can have a different value than in HCM due to a planned position review, promotion or other anticipated change in Job Profile for a worker. **Note:** Adaptive uses Job Profile to calculate annual increases. If the Job Profile is not entered, annual increases will not calculate.

7.2. Hiring Plan Details

New for FY27 planners are now required to capture Faculty Hiring Plan on the new 9 UWA - Hiring Plan Compensation. The sheet requires the use of the Hiring Plan Position ID. This enables planners to compare budgeted amounts in Adaptive with Hiring Plan Database entries. All approved positions must be included in the FY27 Budget. The information on 8 UWA – Hiring Plan Data sheet refreshes overnight and will reflect changes made in the Hiring Plan Database. A brief demo of the Hiring Plan can be found at [Office Hours - October 23 2025](#) (40:54). More detail is available in the [UW Connect Financial Portal](#)

7.3. New Positions

To plan for new positions that have not yet been created in Workday HCM, please use the placeholder value: “New Position” in the Position_Type_Adaptive_Only column on Sheet 4. Please note that Adaptive reports will aggregate all values under a single “New Position” total. You will not be able to run reports on an individual New Position.

7.4. Consider whether or not to use split row functionality

Planners can utilize Split Row functionality on Adaptive Sheet 4 – UWA – Exp – Comp – Reg Pay and Union. A key value of split rows is that child rows are automatically summed in the parent row and remained grouped together. So, where a unit wishes to plan for three funding splits for a single position, the three splits are entered as three child or split rows that will roll-up to the single parent row – helping planners to see the sum of the percentages entered directly on the entry sheet rather than by running a separate report. This can help ensure the total position funding split % matches the total expectation. (e.g., 100% for a full-time position, 50% for a part-time position, etc.)

Using split rows, however, can prevent Display Options from working as expected and can make copy/paste from Excel to Adaptive more difficult. See Section 6.5 for more information.

7.5. Consider using a vacancy or attrition factor

Rather than making entries on specific positions that might become vacant in FY25 - FY30, consider planning for as yet unknown position vacancies with a single lump sum dollar value (i.e., an “attrition factor”) entered on Sheet 5 with a negative dollar value.

The number of rows used for the factor depends on the level of detail required. Attrition can be defined more granularly by specific Job Profile and/or Job Family. Alternatively, a total pooled amount could be entered by Resource and GL Account only with Notes used to help define what is entered. **Remember:** Adaptive will automatically calculate the attrition fringe based on the Salary GL Account used. Example vacancy of -\$1,897/month or \$22,765 total/year is shown below (+ the associated benefits calculated “behind the scenes” via formulas for -\$2,472/month total):

Cost Center	Resource	GL Account	Notes	FY2025
CC101211 Facilities Communications and Marketing	RS100216	50060 Salaries	7% vacancy rate	-22,765

Account	Jul-24
Salary Expenses	-1,897
Fringe %	30.30%
Fringe Benefits	-575
Salary and Benefits	-2,472

7.6. Use Sheet 5 for lump sum dollar entries and pooled compensation expenses.

In the case of step increases and other position or worker specific increases for classified represented staff where planning by each specific type of increase, effective date, and position may be burdensome, consider planning these increases as a lump sum “pool” on Sheet 5. Calculate a single dollar figure that aggregates the expected impact of all increases for a single Job Profile population as a single lump sum “pooled” amount.

The number of rows used for the factor depends on the level of detail required. Attrition can be defined more granularly by specific Job Profile and/or Job Family. Alternatively, a total pooled amount could be

entered by Resource and GL Account only with Notes used to help define what is entered. **Remember:** Adaptive will automatically calculate the attrition fringe based on the Salary GL Account used.

7.7. Enter an expected lump sum for locally funded unit adjustments

If your unit anticipates awarding unit adjustments which are locally funded, please enter the total expected lump sum dollar value on Sheet 5 with Ledger Account: 50000:Salaries and Wages - Instruction and Research Faculty, the appropriate Resource worktags, and a representative Job Profile so fringe benefits will calculate.

7.8. Understand the limits of planning by optional detail for funding split percentages

Consider the cost/benefit of planning position funding split percentages by optional worktags like gift, grant, or activity.

The required level of detail to plan funding split percentages is:

Resource + Cost Center + Ledger Account + Position (either a Position ID or "New Position")

Optional worktags can be used in addition to those above but may require more manual entry. With few exceptions, worktags available in Adaptive for use on funding split percentages are limited to those presently available in Workday Financials. Funding splits for future gifts or grants that a unit anticipates being awarded are not available for planning which limits the value gained in budget vs. actual reporting for funding split percentages planned at a grant worktag level of detail. Additionally, plan data entered in Adaptive is not available in Award budget vs. actuals reports or within the Workday Financials grants modules.

7.9. Plan by Month, not by Pay Period

Budget values are set by month, not by pay period. Additionally, actuals are summarized by month in Adaptive, not by pay period. Where your actual funding split changes pay period by pay period based on actual sponsored activity, Adaptive isn't the tool to plan for or forecast for these pay period by pay period adjustments.

8.0 Revenue Planning Best Practices

8.1. Core Funds Distributions and Transfers In/Out

Reminder: Distributions of core funds resources from FPB are no longer entered on Sheet 1 and are only visible to units and campuses through reports. This change was necessary to allow timely and accurate updating as distribution assumptions are updated, first in late January and then for the final time in early May.

Planners should continue to use Sheet 1 to enter double-sided transfer entries: one entry for the distribution OUT from one worktag combination (e.g., a Dean's office cost center) and one entry for the distribution IN to another worktag combination (e.g., a dept cost center). These entries can be separate rows or planners may elect to use split row functionality (See Section 6.5 about risks using split rows). Either way, the total OUT entries should match the total IN entries for transfers within your CCH05 unit. Transfers outside of your CCH05 unit or received from other CCH05 units will be offset by entries within the sending

or receiving CCH05. Failure to enter a balanced distribution will overstate or understate revenue when rolled up for the total UW Academy budget.

Additionally, the resource worktags on both sides – the out and the in entries – must remain the same.

8.2. Non-Core Fund Transfers In and Out

Planners will use Sheet 2 to enter fund transfers for non-core resources – Gifts, Grants, and Auxiliary resources. However, just like entries on Sheet 1, planners should be careful to ensure that the total OUT entries should match the total IN entries for transfers within your CCH05 unit. Transfers outside of your CCH05 unit or received from other CCH05 units will be offset by entries within the sending or receiving CCH05 unit.

Additionally, the resource worktags on the out and the in entries must remain the same.

8.3. Non-Core Revenue and Enterprise Overhead and Assessments

Unit planners are responsible for projecting and entering gift and auxiliary revenue into Sheet 2 along with the appropriate overhead expense or assessment (e.g., gift assessment). Because these overhead charges are formulaic and often dependent on detail not included in the plan, units may consider using a historical trend or average that increases by the same rate as the underlying revenue rather than trying to replicate the formula used in actuals. Grant revenue (except for program income) and facilities and administration (F&A Recovery) will automatically be calculated and should not be manually entered.

9.0 Other Use Case Best Practices

9.1. Contra Accounts

New for FY27, contra accounts must be entered as positive numbers in all sheets unless there is a need for an intentional reversal. This is a change from prior years when contra accounts were entered as negative numbers. Contra accounts can be identified in Sheets 1, 2, 4, 5 and 6 by the IsContra column. Adaptive will automatically consider these amounts as negative and calculate them correctly in reporting.

9.2. Fixed Costs

Units managing activity characterized by the legacy “fixed cost” designation should enter planned expenses using the Program worktag aligned with that fixed cost activity. Expense entry in Adaptive should match the PRF request for central funding. Please submit questions to the BPO shared email at fpb-bpo@uw.edu.

9.3. Summer Quarter

SUM 2026 planning resources can be found at [Summer Sessions 2026 Planning Resources](#). If you cannot access the planning resources, you should send an email to summersessions@uw.edu requesting that you be added to the user list.

Planners should make summer quarter entries in the “UWA Evergreen Budget and Forecast Entry Version”. Use of the Summer Quarter Dashboard which includes Sheets 4, 5 and 6 for SUM 2026 expenses, is encouraged.

Remember: Summer Sessions budgets should be entered into Adaptive Planning with the unique Summer Sessions worktags assigned to your college, school, or department:

- All Summer Sessions expenses should be assigned to the **RS100080** resource code
- Use the correct Summer Sessions cost center (CCxxxxxx) and program (PGxxxxxx) worktags assigned to your college, school, or department
- If your college or school uses activity codes to identify course-level expenses, be sure to use the correct Summer Sessions activity codes (ACxxxxxx) assigned to your Summer Sessions courses.

The column labeled *Summer Quarter* indicates that the selected Cost Center is considered a Summer Quarter Cost Center and should therefore follow the Summer Quarter worktags and process.

9.4. Central Funding Requests from the Provost Reinvestment Fund or ABB Values Pool

Units should not enter expenses or revenue associated with FY27 OnCycle Provost Reinvestment Fund requests or ABB Values Pool requests. Requests must be submitted through the [Request for Provost Reinvestment Funds form](#) on FPB's website by February 23, 2026, to be considered. These requests will be considered during the Annual Review process and units will be notified of approved requests in time to make entries during the late-spring Adaptive reopening window.

10.0 Data Quality Issues to Avoid

10.1. Ledger Account & Resource Combinations

Be mindful of the appropriate usage of ledger accounts and resource worktags when making Adaptive planning entries. Adaptive does NOT use custom validations in the same way Workday Financials does so planners will be required to know, check for, and use the correct combinations of worktags in plan entries. For example, Gift revenue ledger accounts should not be used with Core Funds GOF or DOF resource worktags while Federal Grant revenue ledger accounts should be used with the appropriate Federal grant resource worktag.

10.2. CCHs instead of CCs

Sheets require a cost center and will default to the already selected Level for that sheet. Therefore, planners should be careful when making entries on a sheet for which they've selected a Cost Center Hierarchy level. **Entries at cost center hierarchy levels cannot be imported into Workday Financials.**

10.3. Warnings & Hard Stop Data Validations

There are two types of Data Validation rules in Adaptive Planning sheets

- Critical – rows are outlined in red and prevent saving the sheet without correcting
- Warning – rows are outlined in orange, but the sheet can still be saved without correcting

More detail is available in the [UW Connect Financial Portal](#).

10.4. Using Workflow to Lock your unit's entries

Planners with access to Cost Center hierarchy levels may utilize optional "Workflow" functionality within Adaptive to facilitate their unit/campus specific review and approval processes. Workflow allows a department within a unit or campus to submit a proposal for review by planners with access to a hierarchy level. During previous budget cycles, units reported finding Workflow useful to prevent departmental entries

between the time unit leadership approved the budget proposal and the time FPB locked the proposal version. Planners with access to that hierarchy level can approve or deny the submission. Approving will lock entry below the hierarchy level. Denying will unlock, allowing planners to make or edit entries.

11.0 Using Scenarios to Compare and Iterate on Budget Entries

Scenarios in Adaptive enable planners to build what-if scenarios from a “Base Version.” With scenarios, planners can:

- Make proposed changes to the data of base versions without affecting the base versions.
- Build reports and charts of scenario data to analyze against the base version or other versions.
- Share your scenarios with collaborators who can contribute to the changes.
- Send back, discard, or approve the changes of others.
- Merge proposed changes into the base version with a few clicks.
- Scenarios work well to draft and evaluate different what-if scenarios before entering final numbers into the base version. You may compare the base version with any scenario you have access to

More detail is available in the [UW Connect Financial Portal](#)

12.0 How to Complete Your Operating Budget Proposal by Feb 23, 2026

FY27 budget proposals should receive final review by the necessary and appropriate unit or campus leadership prior to 5:00 pm (Pacific) February 23, 2026. This is in addition to the required consultative process and is to ensure that departments within your campus or unit have not inadvertently altered data during the last few days of the budget process.

As there is no formal submission action within Adaptive, unit and campus budget proposals will be considered submitted at 5:00 pm (Pacific) on Monday, February 23, 2026, when BPO takes a locked snapshot copy of the FY27 Evergreen Budget and Forecasting version.

Akin to previous budget development cycles, all academy units/campuses are required to respond to a series of narrative questions regarding their financial data as entered in Adaptive. All operating budget narrative responses are to be completed within a Microsoft Form and submitted by 5:00 pm (Pacific) on Monday, February 23, 2026. All templates and instructions for submission of this information is provided on BPO's [FY27 Operating Budget Development materials website](#).