

Submitting On-Cycle Funding Requests for the FY2027 Budget Development Cycle

This process guide provides information to units who wish to submit an on-cycle request for funding from the following programs and sources:

- Provost Reinvestment Fund
- ABB Values-Based Pool
- Faculty Diversity Initiative Bridge Program
- Fixed Cost

1. Notable Changes and Upgrades in Functionality

- a. **Collaboration** – The request app allows multiple users to work together on a single request. The “chief administrative officer” for each unit should be marked as the “primary contact,” but thereafter, users may add the NetID for collaborators as fits each unit.
- b. **Save work in progress** – the request app allows users to save requests in progress and return later to complete and submit them.
- c. **New data structure for financial detail** – the request app asks for more detail on component parts of each request. This enhances clarity regarding the purpose, dollar amounts, and characteristics of requests and enables more efficient processing of approved requests to funding distributions in Workday Adaptive and Financials.
- d. **Provide more detail on FDM worktags to use for approved funding** – the request app enables units to provide more detail for distributions of approved funding in Workday Adaptive and Financials. This is achieved by including fields for Cost Center, Program, Activity, Standalone Grant, and Assignee.

2. Accessing the Form

- a. To begin a request, login with your NetID to this web-app:
<https://fin-s-web22.finance.uw.edu/fin/PRF/>
- b. The home page is a table listing requests for which you are listed as a contact. If this is your first time logging in, the table maybe blank.

Click “Create Request” in the upper right corner of the webpage to begin a request.

3. Completing the Form

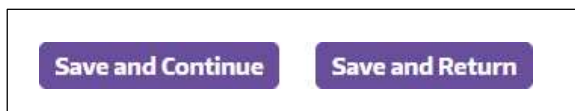
a. Contact & Department Information

The screenshot shows a web form with three main sections. The first section, 'Request Title / Short Description*', has a text input field with a placeholder 'Limited to 100 characters'. The second section, 'Requesting Department Information', contains a 'Business Unit*' dropdown menu with the placeholder 'Search using CCH (Level 05) Referenc...'. The third section, 'Contact Information', includes an 'Add Contact' dropdown menu with the placeholder 'Search using UW NetID' and a purple 'Add Contact' button.

- i. Request Title. On the first page of the request, users must provide a Title for the request. This title should be short but descriptive of each specific request.
- ii. Business Unit. Below the request title, users must identify the Cost Center Hierarchy 05 (CCH05) level which will receive funding should the request be approved. Type in the name of CCH05 or select from the drop-down menu.
- iii. Contact Information. By default, the user logged into the app will show as a contact for the request. By typing in the name, or NetID of collaborators, users may add contacts and others to be able to see and edit the request.
- iv. The chief academic officer of the CCH05 level should be identified as the primary contact for the request. Users may select or update the contact identified as the primary contact by selecting the primary contact at the bottom of the Contacts table.

The screenshot shows a section titled 'Update Primary Contact' with a dropdown menu containing the placeholder 'Select one of the contacts'.

- v. Click “Save and Continue” to go to the next page. “Save and Return” will take you back to the main page list of Requests.



- vi. All contact persons listed in the app will receive an email notification whenever the request status changes.

b. Narrative – On the Narrative page, users will indicate:

- i. Funding Type - The source of the funding they are requesting
- ii. Request Rank - The relative priority of this specific request
- iii. Request Cycle – whether this request is on-cycle or not with the annual operating budget development cycle.
- iv. Request Description – a detailed but succinct response to these guiding questions:
 - 1. What problem or opportunity does this request address?
 - 2. How does this request tie into your unit's strategic plan?
 - 3. What the requested funding would “buy” (e.g. faculty, staff, equipment, etc.)?
- v. Unit Strategic Plan - How the request aligns with the unit’s Strategic Plan
- vi. Diversity Blueprint Goals - Whether the request supports the UW’s Diversity Blueprint and if so, which goals.
- vii. Long-Term Financial Plan for "seed" funding - if this is a request for one time or limited duration funds to support or "seed" an ongoing project or initiative, what is the long-term financial plan?
- viii. Funding Options Explored – the other options for funding explored for this activity and why this request was the funding path chosen.
- ix. Units may also upload additional documentation here, if necessary or requested.

c. Funding Detail – On the Funding Detail pages, units are asked for conditions or contingencies related to the request and provide financial detail for each component. Each request should be a stand-alone project or initiative, Please DO NOT bundle disparate activities in a single request unless they are all part of a larger, thematically cohesive project.

- i. Request Conditions – units are asked to specify the condition(s) – if applicable – for this request.
 1. In some cases, the request may be contingent on a certain event or situation occurring (or not occurring), e.g., a federal request for matching funds.
 2. Some requests may have estimates or uncertainty in the dollar amounts required making them “not to exceed” requests.
 3. Other Conditions are for those not listed above but meaningful to the review, approval, or distribution of the funding.

ii. Funding Details

1. To add a row for a component of the request, click the Add New record button at the top of the Funding Details table. Some requests may have only one component. Others may have several.

Funding Details

+ Add new record						
	Requested Start Fiscal Year	Requested End Fiscal Year	Fund Duration	Requested Amount	Funded Start Fiscal Year	Funded End Fiscal Year

2. Limited Duration or One-time requests should have a starting FY and an ending FY.

Create Funding Detail

Detail Information

Start Fiscal Year*
FY26

End Fiscal Year*
FY27

Ongoing
☐

Amount Requested*

3. Ongoing requests should only have a starting year – and the Ongoing box should be checked.

Create Funding Detail		
Detail Information		
Start Fiscal Year*	Ongoing	Amount Requested*
FY26	☒	

Enter the dollar amount request for each component

4. Enter a Component Description that is short, descriptive, and useful for reviewers and approvers to understand what the component is.
5. Select whether the component is compensation expenses (e.g., salaries and benefits), operational expenses or capital expenses (e.g., funding for buildings, building renovations, etc.).
6. Finally, select the priority of the component – high being the most important, low being the least important.

Component Description*	Component Classification*	Component Priority*
	☐ Compensation ☐ Operations ☐ Capital	☐ High ☐ Medium ☐ Low

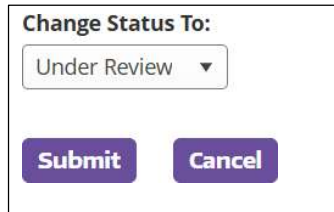
7. Worktag Details – Enter the worktags to which the approved funding should be posted in Workday Adaptive and Workday Financials. **Cost Center, Business Unit, and Resource** worktags are mandatory and must be completed before funding distribution can be processed.

- **Cost Center** and **Business Unit** will default to your unit's standard worktags, but you may update them if a different selection is more appropriate.
- You may enter the **Resource** worktag based on your knowledge or preference; however, it is subject to final leadership approval. After approval, BPO will update the Resource worktag in the request if any changes are needed.
- The **Program worktag** is mandatory for all Fixed Cost requests.

- d. **Unit Matching Detail** – On the Unit Matching Detail pages, units must indicate whether they are matching or not. If matching, from what source and how much. If not matching, why not?

4. Submitting the Form

- a. When entries are completed, the Submission page will allow users to submit by selecting "Under Review" and clicking "Submit."

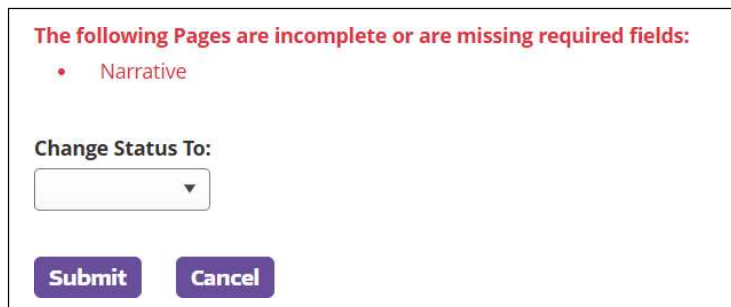


Change Status To:

Under Review ▼

Submit Cancel

- b. If there are required fields not yet complete on any page, red text will indicate the page. Users are not required to complete pages in order and to allow collaboration, different parts of the form may be worked on at different times. However, all required fields on all pages must be completed before the form can be submitted.



The following Pages are incomplete or are missing required fields:

- Narrative

Change Status To:

▼

Submit Cancel