

# **Campus Life Budget and HR Request Form Information**

Please see the below definitions to help you with completing the new Campus Life Budget and HR Request Form. This form should be completed by the department director.

(Note: Please use **FireFox or Microsoft Edge** as the preferred browsers to access the form. This form is **not** compatible with **Google Chrome**)

## **Requester Information:**

**Net Id** – a combination of letters and numbers assigned to you upon hire this is what you use to log into your Emory University computer

**Name**- the name associated with your net id should populate once you click inside of the box. Your name will be displayed last name, first name

## **Adjustment Type / FY:**

**Adjustment Type** – This is a drop-down menu and will describe the type of budget request you want to submit

**Budget Request – Temporary Current Fiscal Year Funding** - Select when requesting funds for one-time expenses in the current fiscal year.

- For example, you would like to request \$20K to be added to your budget to cover the cost of new equipment for your department. These funds do not renew for future years.

**Budget Request – Future Fiscal Year One Time Funding** - Select when requesting funds for one-time expenses in a future fiscal year.

- For example, you would like to request \$20K to be added to your budget to cover the cost of new equipment for your department. These funds do not renew for other future years.

**Budget Request – Future Fiscal Year Recurring Funding** - Select when requesting new additional funds for planned or unexpected recurring expense in a future fiscal year.

- For example, you would like to request \$20K to be added to your Supply line to cover the cost of software that is now need for your department.

**HR Request** – Select when requesting to fill a vacant position, create a new position, out of class pay and extra duty pay.

**Year** – This is a drop-down menu and will provide the current and next two consecutive fiscal years to select for when the requested adjustment type should occur.

**Division** – This field is prepopulated to reflect Campus Life

## **Request Information:**

**Briefly describe your budget request** – This is an open field where a short description of what your budget request is about should be written. Please use the **UPLOAD** button to attach any supporting information that should be provided to assist in deciding about this budget request.

**Department ID** – Key a 6 digits long number, include any leading zeros and press enter. After the department id is provided a pop up should appear with all the speedtypes associated with the department id. Please select the correct speedtype for this budget request and the below 5 fields will populate automatically.

**Department Description**

**Speedtype**

**Speedtype Description**

**Funding Code**

**Funding Source Description**

**Category** - This is a drop down menu and will describe the category of funding that the budget request impacts

**Revenue**

**Staff Salaries / Fringe Benefits**

**Student Salaries**

**Operating Expenses**

**Transfers**

**Amount, \$** - fill in dollar amount of budget request

- **If requesting salary, please include target salary only and do not include the associated fringe**

**How will this be funded** - This is a drop down menu and will describe the different options for how the budget request will be covered

**Reduce Another Line In My Budget**

**Outside Funding**

## **Assign ELT Member**

**ELT Team Member Full Name**- This is a drop down menu and will list off the ELT members. Please assign the budget request to the submitter's appropriate ELT member. The below field will populate automatically once an ELT member's name is selected.

**ELT Team Member Email**

**Submit/Save** – The submitter **must hit** submit/save after completing the form

The submitter will receive a message the following message:

**Thank you! The form has been submitted successfully.**

## **ELT Team Member Only:**

ELT member can access budget and HR request work queue directly from the automated email using the link inside the email notification or by going to the follow webpage [imaging.emory.edu](http://imaging.emory.edu) clicking on three lines in the upper left had corner beside Document Retrieval, then selecting open workflow, and clicking on the carrot button beside Campus Life – Budget Request Process v1.

**CL-ELT Team Review-** While in the ELT Member is in the workflow queue, the ELT Member must select the budget request they want to review and scroll to the bottom of the form and complete all of the steps below:

1. **Select ELT Priority** – This is a drop down menu for the ELT member to assign a priority level on the budget request that has been submitted for their review.

High

Medium

Low

NA

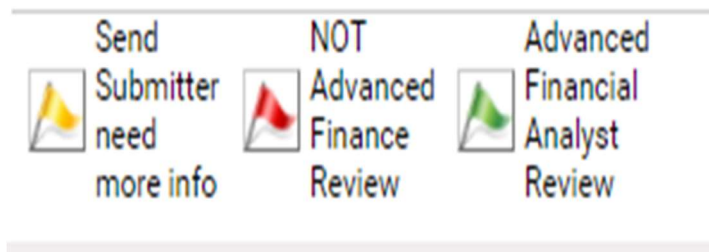
2. **Select ELT Action or ELT r-** This is a drop down menu for the ELT member to select a status of a budget or HR request and will describe the final of action of the Budget or HR request

Send to Submitter Need Info

Not Advanced for Finance Review

Advanced for Finance Review

3. **Save the selections!** After the ELT member has selected an action for each of the above sections: **ELT Priority**, and **ELT Action**, the ELT member **must hit SAVE/SUBMIT button**
4. **Send request to the next step:** To send request to the next step, ELT member must **select** one of the flags to move the budget request into the Financial Analysis Review work queue or HR Initial work queue.



5. **Insert Comments:** The ELT member will then be prompted to add any notes to the budget request then **select ok.**

The screenshot shows a web interface with a sidebar on the left containing 'Inbox' and 'User Interaction'. The main area has a label 'Note Text:' above a large text input box. At the bottom center of the input box is a small 'OK' button.

## **Finance Team Only:**

Finance team members can access budget and HR request work queue directly from the automated email using the link inside the email notification or by going to the follow webpage [imaging.emory.edu](https://imaging.emory.edu) clicking on three lines in the upper left had corner beside Document Retrieval, then selecting open workflow, and clicking on the carrot button beside Campus Life – Budget Request Process v1.

**Financial Analyst Review** – This is a fill-in that the financial analyst team must complete to describe if they have reviewed the request

**Review Completed** – Select if the Financial Analyst has reviewed the budget request and considered the financial implications of the request. This implication should be added in the note section once the financial analyst is ready to submit the request to the financial management team.

**In Progress** - Select if the financial analyst needs more time to review the budget request and considered the financial implications of the request.

If the Financial Analyst approves the request without any issues, they **must select** the bubble for **Review Completed**, hit the **Save/Submit button** then click on the **Analyst Review Completed button** at the top of the form and then enter in any notes that will help in final review of budget request.

## **CL – Finance Team Review**

**All request in this queue will be presented during an ELT meeting for Final Approval or Denial**

**Finance Status** – This is a drop-down menu for the financial management team to select a status if the budget request was a Current Temporary, Budget Addition (Recurring Expense), Budget Addition (One Time Expense), or HR Request and will describe the final of action of the budget request

**Send Back to Analyst Need More Info**

**Not Included in WAM Request**

**Included in WAM Request**

**Approved By WAM**

**Denied By WAM**

## **HR Team Only:**

HR team members can access budget and HR request work queue directly from the automated email using the link inside the email notification or by going to the follow webpage [imaging.emory.edu](http://imaging.emory.edu) clicking on three lines in the upper left had corner beside Document Retrieval, then selecting open workflow, and clicking on the carrot button beside Campus Life – Budget Request Process v1.

**HR Initial Review** -The HR team must complete to describe if they have reviewed the request to see if all necessary documentation has been attached based on the HR Request. (Review notes and uploads)

**Approve** - Select if the HR Team Member has reviewed the request and the submitter has all the required documentation for the request.

**Reject** - Select if the HR Team Member has reviewed the request and the submitted has not provided all the required documentation for the request.

Items: 1



Approve



Reject

To route the budget request the HR team must approve or reject the request by **selecting/clicking** on one of the icons then enter in any notes that will help in review of budget request. Please remember the request will route back to Director of HR in the HR Final Review work queue once the finance team has reviewed and provide insight on funding needs and after ELT has reviewed and approved the request collectively.

## **HR Final Review**

All request in this queue have been presented to and approved by ELT collectively

**Campus Life HR - Hiring Process Form** – There are two tabs on this form, HR and Finance. The Finance tab has information that is pulled in from the Budget and HR request form. The HR tab has fill-ins that HR must complete.

### **Campus Life HR – Hiring Process Form**

HR	Finance
<b>Hiring Manager Information</b>	
Name	
Email Address	
Position Title	
<b>Requisition Posting Status</b>	
<input type="radio"/> Job Posted	
<input type="radio"/> Reviewing Candidates	
<input type="radio"/> Interviewing Candidates	
<input type="radio"/> Hired Candidate	
<b>Selected Candidates</b>	

After completing the HR tab for all finalized HR requests, the HR Team must select the review completed button above the Campus Life HR – Hiring Process Form. All approved and denied request can be viewed in the work queue at any time.



Review  
Completed