	CSU Monterey Bay
	Budget & Planning Office
	End User Guide

Vacancy One-Time Budget Request Form
(preassigned fields)

Purpose

The Vacancy One-Time Budget Request Form should be used to request budget from the vacancy pool for fiscal/1x salary actions. If you need to request budget to fill a vacant position or make a permanent salary adjustment to an existing position, please use the Vacancy Base Budget Request Form.

Notes Regarding Template: The template with (workflow – preassigned fields) at the end of the title follows a standardized workflow, and requires five recipient's for all fields to populate. In order for these fields to be assigned to the correct role you must list all five recipients and follow the workflow order listed in step 4, located on the second page of this document.

If you have less than five recipients (an example could be that you are the form filler and the Divisional Budget Rep), please utilize the template with (unassigned fields) at the end of the title. This template allows for more flexibility

If you have any questions regarding which template to use, please reach out to the Budget Office (budget_office@csumb.edu), and we will be glad to help.

Process

1. Navigate to the Forms section of the Budget Office website

2. Scroll down to the Budget Adobe Sign Workflow Forms section and select the link titled **Vacancy One-Time Budget Request Form with preassigned fields**

> **Vacancy One-Time Budget Request Form** – This form is used to request budget from the vacancy pool to fund fiscal/1x salary actions. For information on how to access this form, please view the training video and user guide below.
>
> - Vacancy One-Time Budget Request Form with preassigned fields – this standardized workflow requires five unique recipients. If you do not have the five recipients, please use the workflow with unassigned fields:
>   - User Guide Vacancy One-Time Budget Request Form (preassigned fields)
>   - Training Video (preassigned fields)
>
> - Vacancy One-Time Budget Request Form with unassigned fields – this workflow is flexible and does not follow the standardized workflow. You can add up to five recipients, but you will need to assign each recipient to the correct fields. For reference on which fields need to be completed by each recipient, please reference the user guide below:
>   - User Guide Vacancy One-Time Budget Request Form (unassigned fields)
>   - Training Video (unassigned fields)

3. You will be navigated directly to the workflow in Adobe Sign. You may have to sign in using your CSUMB SSO credentials. Please let the Budget Office know if you are receiving an error message at this point.

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4. When you reach the workflow landing page, you will enter in a recipient for each role and update the following fields following the prompts below:

Recipient's*
- **Form Filler (prefill**) – This role fills out information requested on the form without signing or approving.
- **Divisional Budget Representative** – This role fills out information on the form and is a signer/approver
- **Dean/AVP** – This role reviews the information provided by the Form Filler and Divisional Budget Representative and signs/approves
- **Divisional VP** - This role reviews the information provided by the Form Filler and Divisional Budget Representative and signs/approves
- **VPAF/CFO** – This is the final signer of the form. They will review the information provided by the Form Filler and Divisional Budget Representative and will approve or deny the request.

CC's
The Budget Office (budget_office@csumb.edu) and Katie LaPlace (klaplace@csumb.edu) must be added as a CC on these forms. You can add as many other individuals as you would like here. If you are in Academic Affairs, please add Jennifer Hinds (jhinds@csumb.edu) here instead of as a signer.

Message*
Here you will update the name of the title to include the Division – Department – Position Number – Date to the title.

Files*
The file is attached.

Preview & Add Signature Fields
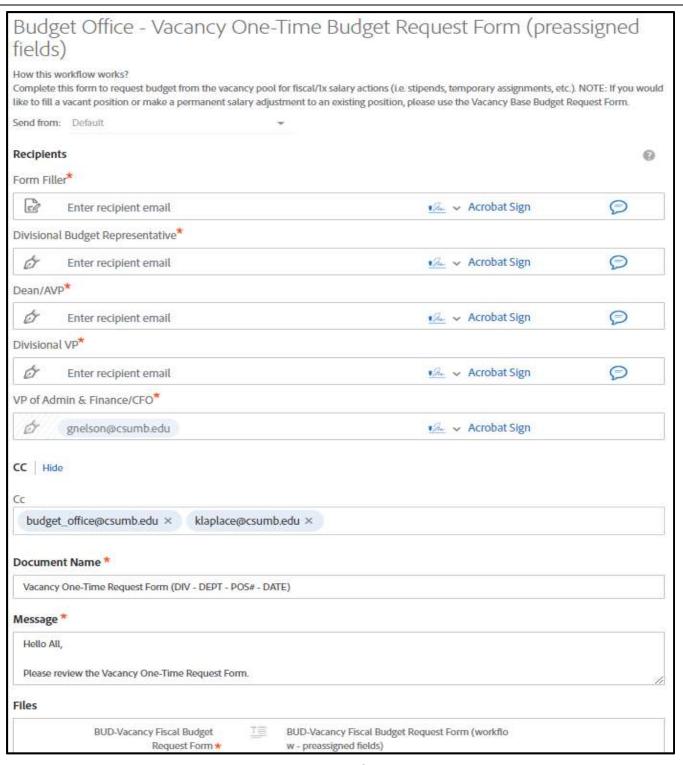This box should be checked to preview all fields

Please see a completed example of step 4 on the next page

Vacancy One-Time Budget Request Form
(preassigned fields)

Budget Office - Vacancy One-Time Budget Request Form (preassigned fields)

How this workflow works?
Complete this form to request budget from the vacancy pool for fiscal/1x salary actions (i.e. stipends, temporary assignments, etc.). NOTE: If you would like to fill a vacant position or make a permanent salary adjustment to an existing position, please use the Vacancy Base Budget Request Form.

Send from: Default ▼

Recipients ❓

Form Filler*

| | Enter recipient email | ✍ ▼ Acrobat Sign | 💬 |

Divisional Budget Representative*

| | Enter recipient email | ✍ ▼ Acrobat Sign | 💬 |

Dean/AVP*

| | Enter recipient email | ✍ ▼ Acrobat Sign | 💬 |

Divisional VP*

| | Enter recipient email | ✍ ▼ Acrobat Sign | 💬 |

VP of Admin & Finance/CFO*

| | gnelson@csumb.edu | ✍ ▼ Acrobat Sign |

CC | Hide

Cc

| budget_office@csumb.edu ✕   klaplace@csumb.edu ✕ |

Document Name *

| Vacancy One-Time Request Form (DIV - DEPT - POS# - DATE) |

Message *

| Hello All,

Please review the Vacancy One-Time Request Form. |

Files

| | BUD-Vacancy Fiscal Budget Request Form * | ≣ | BUD-Vacancy Fiscal Budget Request Form (workflow - preassigned fields) |

Vacancy One-Time Budget Request Form
(preassigned fields)

5. The form will populate with fields pre-assigned to the proper recipient. The following fields should be completed by each signer (for reference, the form can be found on the next two pages):

Form Filler (prefill)
- Requestor
- Extension
- Position Number
- Previous Incumbent's Name
- Dept Name & Number
- Job Code & Class Title
- Comments/Justification
- Account*
- Dept ID*
- Fund*
- Class (if applicable)*
- Project (if applicable)*
- Program (if applicable)*
- Proposed Start Date of Salary Action
- Proposed End Date of Salary Action
- Request Salary Budget

Divisional Budget Representative
- Estimated Salary Savings Available
- Divisional Budget Representative Signature & Date

AVP/Dean
- AVP/Dean Signature & Date

Divisional VP
- Divisional VP Signature & Date

VP of Administration and Finance/CFO
- Amount Approved by CFO
- Approval Radio buttons
- VP of Administration and Finance/CFO Signature & Date

*These fields are typically completed by the Form Filler (sender), but they are assigned to Anyone. Once these fields are filled out, they cannot be edited.

Vacancy One-Time Budget Request Form

Purpose: Complete this form to request budget from the vacancy pool for fiscal/1x salary actions (i.e. stipends, temporary assignments, etc.). NOTE: If you would like to fill a vacant position or make a permanent salary adjustment to an existing position, please use the **Vacancy Base Budget Request Form**.

Instructions: Fill out all applicable information. If your request is approved, please attach the signed approval to your request for fiscal/1x salary action.

Requestor_____   Extension_____

Position Information for Funding Source

Position Number		**Previous Incumbent**	
Dept Name & Number		**Job Code & Class Title**	

Justification for Request

Funding Information

Account	**Dept ID**	**Fund**	**Class (if applicable)**	**Project (if applicable)**	**Program (if applicable)**

Budget Request

Proposed Start Date of Salary Action		**Proposed End Date of Salary Action**	

(To be completed by Requestor)   **(To be completed by Div BUD Rep)**   **(To be completed by CFO)**

Requested Salary Budget*		**Estimated Salary Savings Available**		**Amount Approved by CFO****	

*Only include salary in the amount requested.
**This is an up-to amount. You will receive an amount that does not exceed the official notification letter from Human Resources or the amount approved by the CFO, whichever is less.

Divisional Budget Representative   **Date**

AVP/Dean   **Date**

Divisional VP   **Date**

Office of the VPAF/CFO Use Only   ☐ Request Approved   ☐ Request Denied

VP of Administration and Finance/CFO   **Date**

6. After you have verified that every field is assigned to the correct participant, select **"fill & sign"** or **"sign then send"** on the bottom right-hand corner.