



CSU Monterey Bay Budget & Planning Office End User Guide

Vacancy Base Budget Request Form (unassigned fields)

Purpose

The Vacancy Base Budget Request Form should be used to request budget for filling vacant positions or any other permanent salary adjustments (IRP, promotion, etc.) If you would like to request the use of vacancy budget for one-time salary actions, please use the Vacancy One-Time Budget Request Form.

Note: This workflow provides the sender more flexibility if they do not have the five unique recipients required for the preassigned workflow. A common example of this would be the Form Filler and Divisional Budget Representative roles being filled by one person.

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 Base Budget Request Form with unassigned fields**

adjustments. For information on how to access this form, please view the training video and user guide below.

- [Vacancy Base 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:
 - [PDF User Guide Vacancy Base Budget Request Form \(preassigned fields\)](#)
 - [Training Video \(preassigned fields\)](#)
- [Vacancy Base 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:
 - [PDF User Guide Vacancy Base 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



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Budget Office - Vacancy Base Budget Request Form (unassigned fields)

How this workflow works?
Complete this form to request budget for vacant positions or any other permanent salary adjustments (i.e. IRP, promotion, etc.). If you would like to request the use of vacancy budget for one-time salary actions, please use the Vacancy One-Time Budget Request Form.

Send from: Default

Recipients

Form Filler

Enter recipient email Acrobat Sign

Divisional Budget Representative

Enter recipient email Acrobat Sign

Dean or AVP

Enter recipient email Acrobat Sign

Divisional VP

Enter recipient email Acrobat Sign

VP of Administration and Finance/CFO*

gnelson@csumb.edu Acrobat Sign

CC | Hide

CC

budget_office@csumb.edu x klaplace@csumb.edu x

Document Name *

Vacancy Base Budget Request Form (DIV - DEPT - POS - DATE)

Message *

Hello All,
Please review and sign the Vacancy Base Budget Request Form.

Files

BUD-Vacancy Base Budget Request * BUD-Vacancy Base Budget Request Form (unassigned fields)



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5. The form will populate with fields that may or may not be assigned to the proper recipient(s). You will have to go through the document and assign the following fields to the correct individuals completing the rolls listed below. (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
- 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 in the Adobe Sign process, they cannot be edited.



Vacancy Base Budget Request Form

Purpose: Complete this form to request budget for vacant positions or any other permanent salary adjustments (i.e. IRP, promotion, etc.). If you would like to request the use of vacancy budget for one-time salary actions, please use the **Vacancy One-Time Budget Request Form**.

Instructions: Fill out all applicable information. If your request is approved, please attach the signed approval to your Request to Recruit (RTR) form.

Requestor _____

Extension _____

Position Information for Funding Source

Position Number		Previous Incumbent's Name	
Dept Name & Number		Job Code & Class Title	
Comments/ Justification			

Funding Information

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

Proposed Start Date of Salary Action	
--------------------------------------	--

Budget Request

(To be completed by Requestor)

Requested Salary Budget*	
--------------------------	--

(To be completed by Div BUD Rep)

Estimated Salary Savings Available*	
-------------------------------------	--

(To be completed by CFO)

Amount Approved by CFO***	
---------------------------	--

*Only include salary in the amount requested. To be completed by Requestor.

**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 Use Only

Request Approved

Request Denied

VP of Administration and Finance/CFO

Date



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- 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.

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Relative to Page Navigate to...

***Only include salary in the amount requested. To be completed by Requestor.**
****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.**

Signature	Date
Divisional Budget Representative	Date
Signature	Date
AVP/DEAN	Date
Signature	Date
Divisional VP	Date
Office of the VPAF Use Only	<input type="checkbox"/> Request Approved <input type="checkbox"/> Request Denied
Signature	Date
VP of Administration and Finance/CFO	Date

File Attachment File Attachment File Attachment

Sign, then Send Back Save Progress