VUMC BUSINESS EDUCATION

Capital Request Form

Capital Planning Step 1

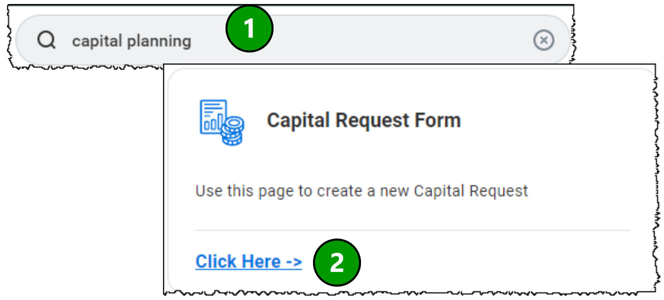
VUMC users can create a new Capital Request using the Capital Request Form. Follow the steps below to complete a Capital Request Form in Workday.

From the Workday Homepage:

1. Type **Capital Planning** into the **search bar** and press **enter** on your keyboard.

Note: Capital Planning will be found under **Tasks and Reports**.

2. Select **Click Here ->** under **Capital Request Form**.



From the Capital Request Form:

1. On Step 1 of the Capital Request Form, you must input required (*) **Contact Information**. Your name and phone number will auto-populate as the **Primary Contact Name** and **Primary Contact Phone**.

Note: The **Capital Request ID Number** will automatically generate.

2. Select **Next**.

3. Under Step 2 on the Capital Request Form, you must input the **Capital Request Name**, **Description**, upload any **relevant Documents**, **Area**, **Operating Entity**, **Dept/PCC**, **Fiscal Year**, **Capital Request Start Date**, **Capital Request End Date**, and **In Service Date**. Dates can be modified later.

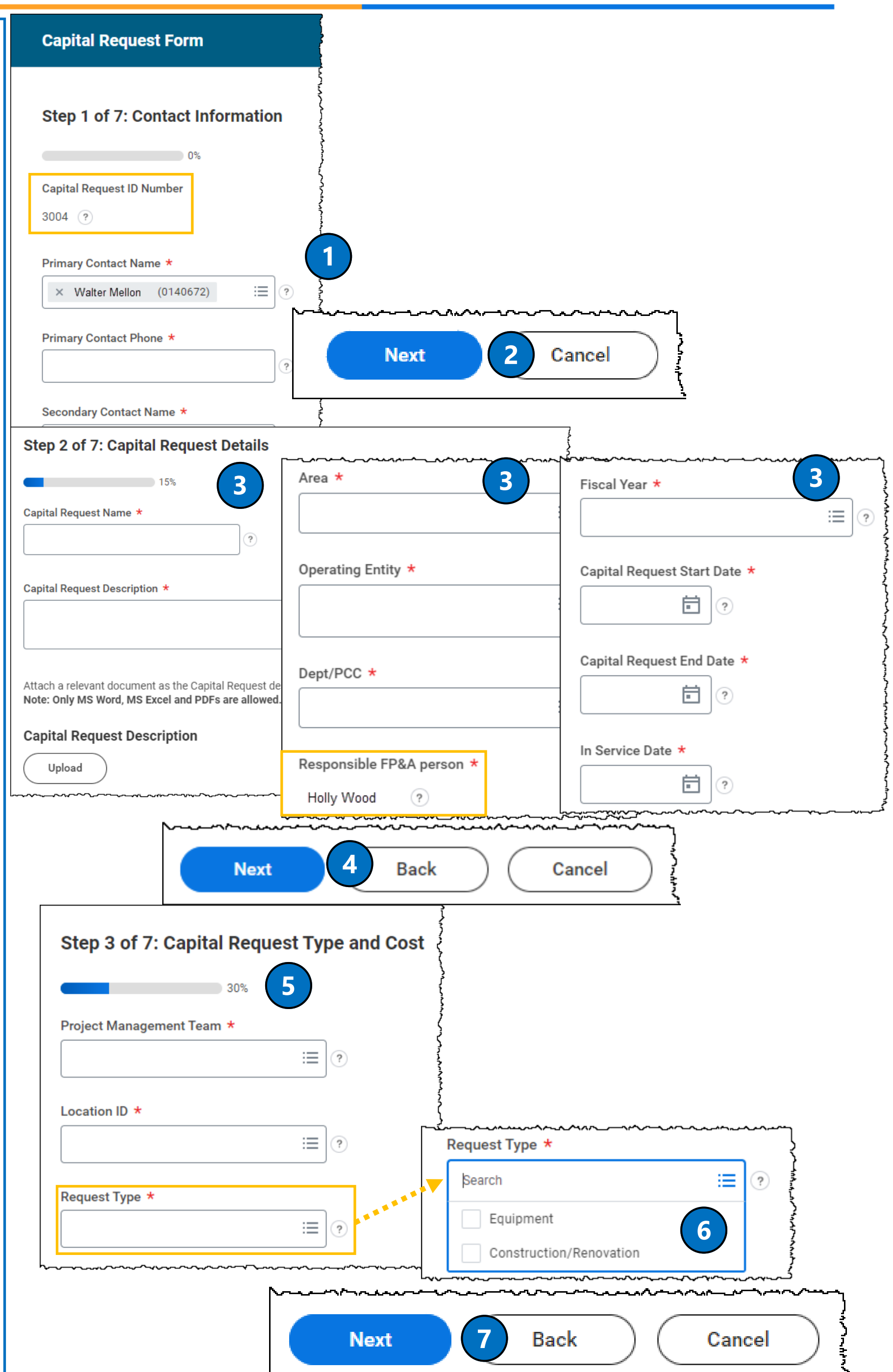
Note: Based on above responses, the Responsible FP&A person will automatically populate.

4. Select **Next**.

5. Under Step 3 of the Capital Request Form, you will need to select the **Project Management Team** and the **Location ID**.

6. Under **Request Type**, select either **Equipment** or **Construction**. From that selection, you will input further information on the page.

7. Select **Next**.



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From the Capital Request Form, Step 4:

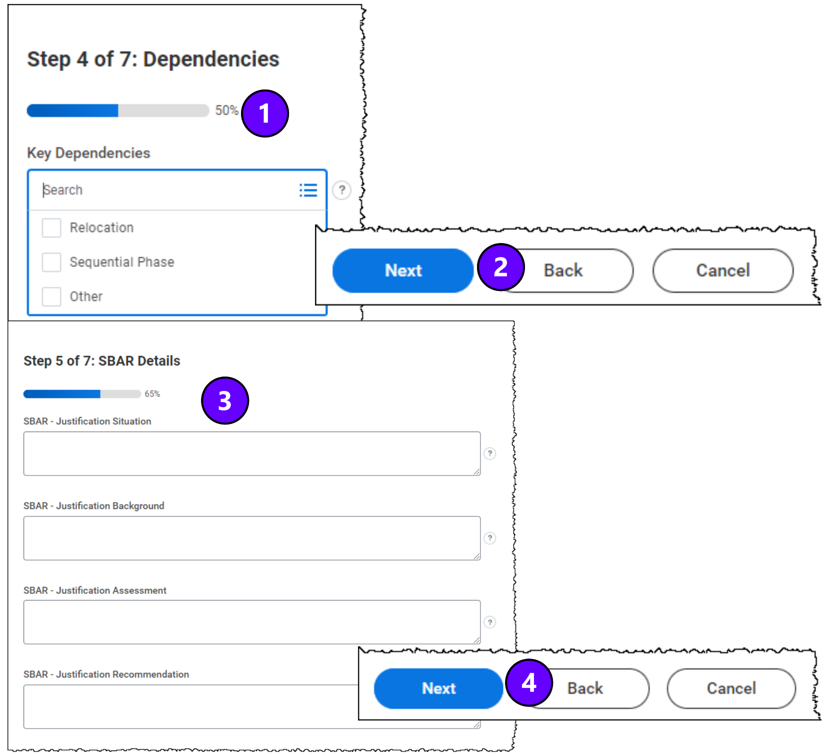
1. Under Step 4 , select **Key Dependencies** from **Relocation**, **Sequential Phase**, or **Other**. After the selection, a description must be added.

2. Select **Next**.

3. Under Step 5 of the Capital Request Form, clearly and concisely input any **SBAR Justification Details** for **Situation**, **Background**, **Assessment**, and **Recommendation**.

Note: If the **Total Capital Request Cost** on Step 3 is greater than $250,000, then the SBAR fields are required.

4. Select **Next**.



From the Capital Request Form, Step 6:

1. Under Step 6 of the Capital Request Form, you have the option to input any **Sourcing Details**.

2. Select **Next.**

3. Under Step 7 of the Capital Planning Form, you will select whether the **Capital Request Category** is **Routine** or **Strategic**.

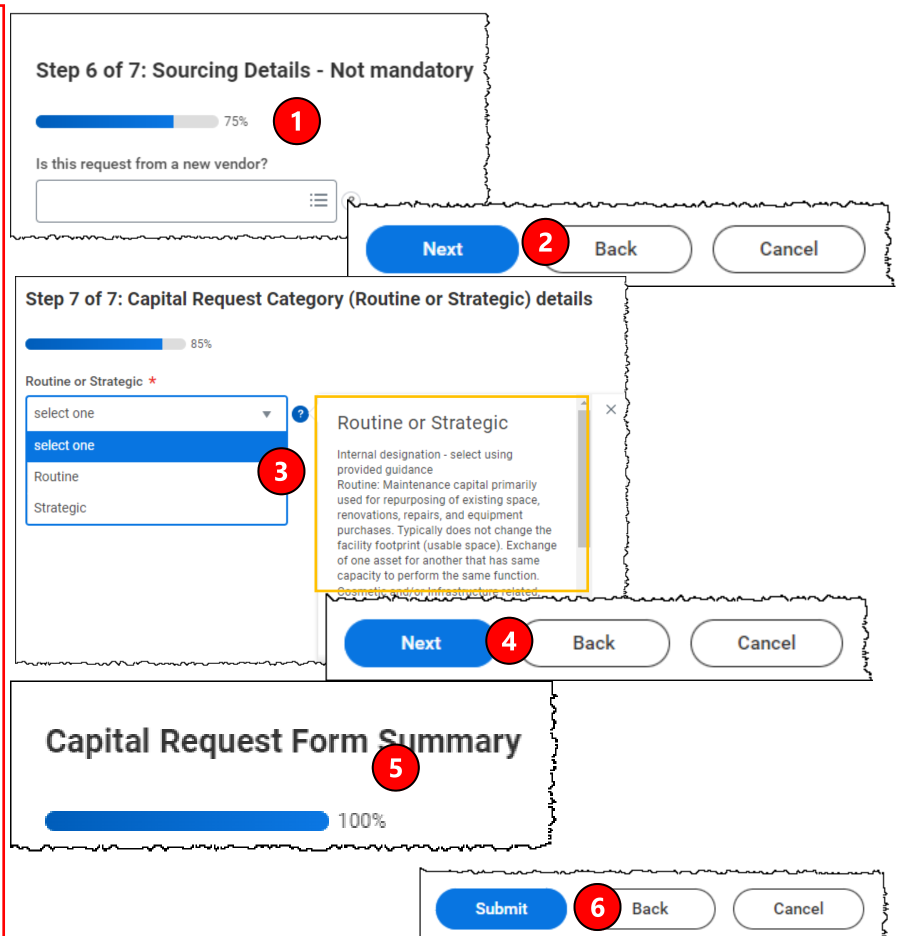
Note: Select the **question mark** next to the field for guidance about your selection.

4. Select **Next**.

5. Review the **Capital Request Form Summary**.

6. Select **Submit**.

Note: To review the status of the Capital Request, use the **My Capital Requests** tool under Capital Planning.



QUESTIONS?

Please email BusinessEducation@vumc.org.