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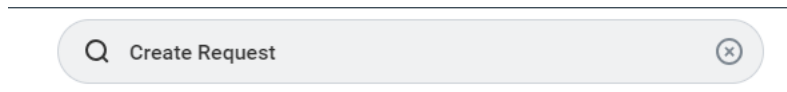
## Request for New Gift Worktag

This guide is for requesting a new gift worktag directly in Workday. It applies to **NEW** gift worktag requests only and is not for modifying, inactivating, or re-activating existing gift worktags.

The Security Groups allowed to initiate this process are Cost Center Finance Specialist, Cost Center Manager and Division Manager.

## Create Request

- 1) In the *Search* field, enter **Create Request**



**OR** if you have the worklet on your dashboard, click on the **Requests** worklet, then click **Create Request**.

### Your Top Apps



Requests



Personal Information



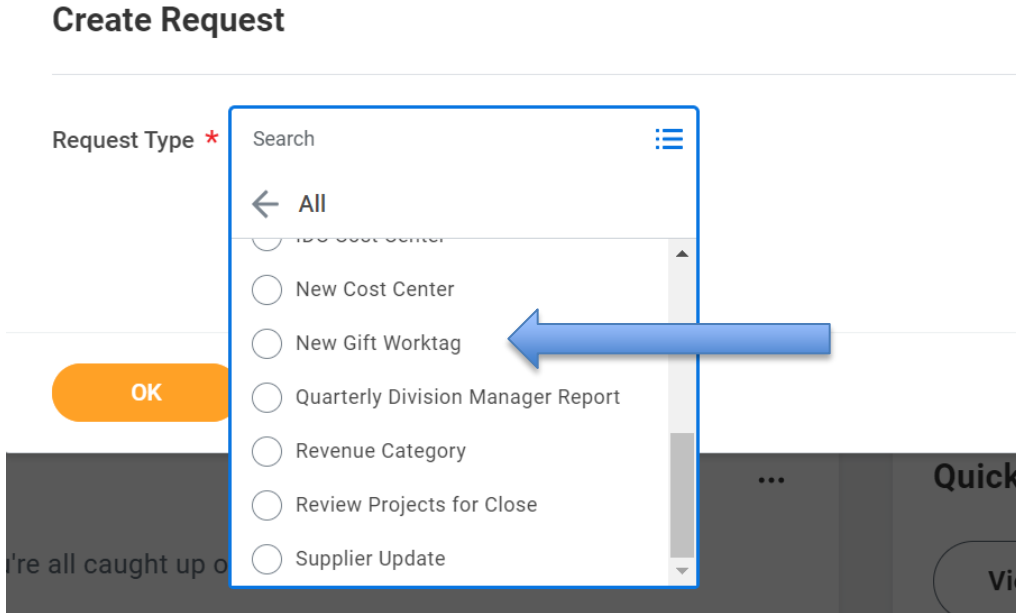
Pay



Time

[View All Apps](#)

- 2) Click **All** in the Request type field.
- 3) Select the radio button next to the **New Gift Worktag** option.



- 4) Read each question, and provide as much detail as possible in the text box answer spaces. If the answer is not applicable please indicate N/A or write not applicable in the text box. All answers are required.

- 1) On behalf of: Enter the proposed Gift Manager for the specific gift request. This will ensure the appropriate workflow for the gift worktag is triggered.

Enter the first and last name of the proposed gift manager in the *on Behalf of Person* box below - this is the person for whom the gift request is being processed:

On Behalf Of

- 2) Provide the name of the donor.

Provide the name of the donor.  
(Required)

3) Provide the proposed name of the gift.

Provide proposed name of the gift  
(Required)

4) Select the Company associated with this gift.

Select gift company  
(Required)

- Montclair State University  
 Bloomfield College of Montclair State University

5) Select the gift type:

Select gift type  
(Required)

- Endowment Expendable  
 Spendable

(a) If selecting Endowment Expendable and for Bloomfield College indicate the special funding worktag required for endowment tracking.

What is the proposed name for the special funding worktag (Bloomfield College only).  
If not applicable indicate NA.  
(Required)

(b) If selecting Spendable there is nothing else to enter.

6) Indicate if there are reporting requirements associated with this gift.

(a) If there are reporting requirements, please explain what the reporting requirements are and to whom the report is to be sent. This will help the accountants determine the type of gift or if it should be a grant.

Is there a financial reporting requirement.  
(Required)

- Yes  
 No

Explain the reporting requirement and to whom it should be submitted.  
(Required)

7) Indicate if the gift has been received or if it is expected to be received from the donor (pledge), and to which company it is associated with.

(a) If the gift was received by Montclair State University provide the MSU Foundation fund number and fund description. This will be provided by the Foundation and is also on the payment voucher. Or any other proof, e.g. receipt from cashier.

Has the gift been received or is it expected to be received from the donor  
(Required)

- Received  
 Expected to be received

Were the funds received by Montclair State University or Bloomfield College

- Montclair State University  
 Bloomfield College

Provide the MSU Foundation fund number (xxxx) and fund description. This will be provided by the Foundation and is also on the payment voucher.  
(Upload the Foundation Payment Voucher using the upload functionality at the bottom of this page for our reference.)  
**NOTE: Not attaching the voucher/proof of receipt will result in the Request being sent back.**

(Required)

(b) If the gift was received by Bloomfield College provide the Colleague fund number.

Has the gift been received or is it expected to be received from the donor  
(Required)

- Received  
 Expected to be received

Were the funds received by Montclair State University or Bloomfield College

- Montclair State University  
 Bloomfield College

Provide fund number from Colleague

(Required)

(c) If the gift is expected to be received complete the text box.

Has the gift been received or is it expected to be received from the donor  
(Required)

- Received  
 Expected to be received

What are you able to provide as proof/pledge of funds? Proof /Pledge of funds are required for a gift worktag to be created.  
Examples are: Letter of intent / Pledge document. Please upload this proof/pledge of funds at the bottom of this page.  
**NOTE: Not attaching the proof/pledge of funds will result in the Request being sent back.**

8) Enter the total amount of the gift.

Enter the total amount of the gift  
(Required)

9) Indicate if the gift to be distributed in full or in installments.

(a) If the gift is to be distributed in installments please provide the installment amount, how often they will be received and for how long.

Is the gift amount distributed in full or in installments?  
(Required)

- Full  
 Installment

1. Provide the installment amount.  
2. How often the installments are to be received. (Monthly, Quarterly or Annually)  
3. How many years are these installments to be received.

10) Provide the amount to be budgeted annually for spending (based on fiscal year July 1<sup>st</sup> to June 30<sup>th</sup>).

What is the amount budgeted annually for spending  
(Required)

11) Indicate the primary purpose of the gift. Usually the donor specifies this purpose.

Please select the primary purpose of the gift.  
(Required)

- Endowed Chair  
 Fellowship  
 Community Partnerships  
 Instructional Support  
 Operational Support  
 Performing Arts  
 Research  
 Scholarships

12) List restrictions indicated by the donor.

List any restrictions the donor has placed on the gift.  
(Required)

13) Indicate the name (first name and last name) of the proposed Gift Manager.

Provide Gift Manager first name and last name  
(Required)

14) Provide the cost center to which this gift worktag will be associated. Provide the name and the cost center ID if known. This is not the supervisory organization.

Provide the cost center to which this gift worktag will be associated.  
(Required)

15) **It is required** to attach a gift agreement document or supporting document or proof/pledge of funds (MSU Foundation payment voucher, cashier receipt, letter of intent/pledge, Bloomfield College Colleague system fund number, or print out of entry from Colleague)

Attach gift agreement document or supporting document or proof/pledge of funds (MSU Foundation payment voucher cashier receipt, letter of intent/pledge)  
(Required)

Drop files here


or

Select files

5) Click **Submit** to route the request to the approvers. If there are any unanswered questions, the request will show an error message indicating which question was

not answered. Answer the require question or indicate N/A and Submit the request again.

- 6) If **Save for Later** is selected, the request will be located in the Inbox where it can be selected and completed at a future point.



**Event saved. Awaiting submission**

Up Next: , Request, Due Date 03/26/2021

[View Details](#)

[Review](#) →

## Approval Workflow

The New Gift Worktag Request will be sent to the Approver's Inbox.

**Review** Request Process : New Gift Worktag : ... ☰

Created: 09/15/2023 | Due: 09/17/2023

For Request : New Gift Worktag :

Overall Process Request Process : New Gift Worktag : --

Overall Status In Progress

**Details to Review**

Request Request : New Gift Worktag :

Request Type New Gift Worktag

Request Date 09/15/2023 10:14:13.152 AM

Request ID (empty)

Requester

On Behalf Of

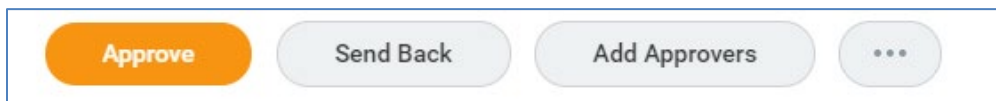


- 1) Review the questions and answers of the questionnaire with emphasis on the type of gift and reporting requirements. Also the cost center and the person to be assigned to the proposed gift worktag (Gift Manager).

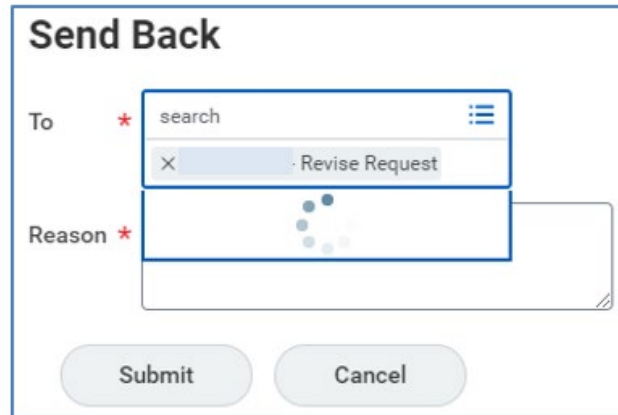
| Question   | Answers                    |
|--|----------------------------|
| Provide the name of the donor.   | test                       |
| Provide proposed name of the gift  | test                       |
| Select gift company  | Montclair State University |
| Select gift type   | Spendable                  |
| Is there a financial reporting requirement.  | No                         |
| Has the gift been received or is it expected to be received from the donor   | Received                   |
| Were the funds received by Montclair State University or Bloomfield College  | Montclair State University |
| Provide the MSU Foundation fund number (xxxx) and fund description. This will be provided by the Foundation and is also on the payment voucher.<br>(Upload the Foundation Payment Voucher using the upload functionality at the bottom of this page for our reference.)<br><b>NOTE: Not attaching the voucher/proof of receipt will result in the Request being sent back.</b> | 346                        |
| Enter the total amount of the gift   | 2345.87                    |
| Is the gift amount distributed in full or in installments?   | Full                       |
| What is the amount to be budgeted annually for spending ?  | 2345                       |
| Please select the primary purpose of the gift.   | Instructional Support      |
| List any restrictions the donor has placed on the gift.  | test                       |

- 2) Once the questionnaire is reviewed either:

- a) Approve to advance the questionnaire to the next step of the process,



b) **Send Back** to the Initiator/Approver to revise the questionnaire,



**Send Back**

To \* search [Menu Icon]

Revise Request

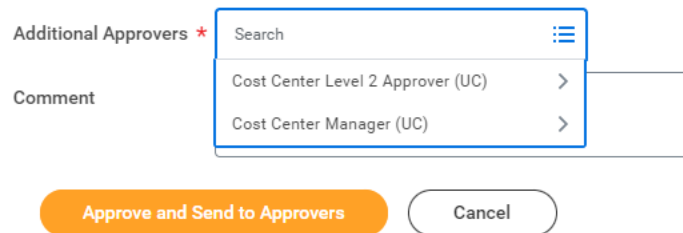
Reason \* [Text Area]

Submit Cancel

c) **Add Approvers** to show your approval but will not progress to the next step until this additional approval is submitted.

#### Add Approvers

The next step in the process will not happen until the additional approvals are done.



**Add Approvers**

The next step in the process will not happen until the additional approvals are done.

Additional Approvers \* Search [Menu Icon]

Cost Center Level 2 Approver (UC) >

Cost Center Manager (UC) >

Comment [Text Area]

Approve and Send to Approvers Cancel

3) In order to follow up on the status of the request:

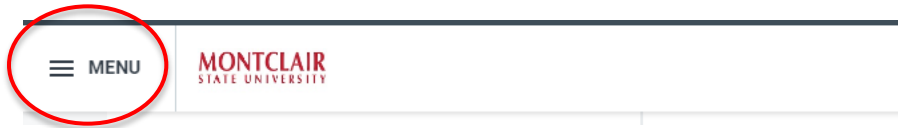
o as Initiator – Click the **Request** worklet on the Home page and view *My Recent Requests*.

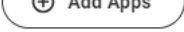



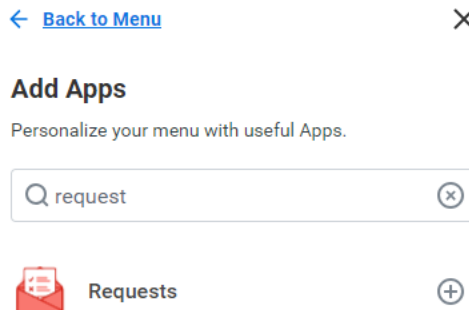
o as Approver – From with the Archive tab of the Inbox, click the **Process** tab of the **View Event option** on the Request.

# Add Requests Worklet to the Home Dashboard

1. Click the **MENU** icon on the left side top of the Workday Home page.



2. Click the **Add Apps** at the bottom of the pane . In the Find Apps window enter *Requests* and add it using the .



3. It will indicate that the App is being added to the menu. It will show as an added worklet to the Apps tab of the menu.

