

New Expense Request Form (NERF) Overview

Effective November 27, 2023, we will use the New Expense Request Form (NERF) via OIT's Fusion Application replacing the former 'Form 2' excel sheet and email process. Streamlining the New Expense Requests process provides an easier submission, review, and approval process for the Institute.

The deadline for all submissions and approvals of the FY25 NERF is January 31 at 5:00 pm.

What's Changing

Submitting your New Expense Requests will now be done via an online form instead of various excel files and emails.

- Hard deadlines – if your unit misses the submission deadline, you will have to either wait for the spring submission or a Committee Lead will have to input the information.
- Requests will be coded as personal services or non-personal services as fringe will now be calculated within the form.
- NERF users will be able to see the requests from across the Institute.
- A NERF report/dashboard will be developed in Workday Adaptive Planning.

Additional NERF Benefits Include

Workflow capability – NERF users will be able to see where their request is after submission.

- Transparency for prioritizations and approvals - NERF users can see the requests from across the Institute.
- Eliminates spreadsheet use - All requests will be electronic with workflow.
- Improved reporting - Data from Fusion will feed into Workday Adaptive Planning, which provides additional reporting capabilities.

Training

New Expense Request Form (NERF) training will be released in two parts beginning November. **The Budget Office will schedule unit/departmental training sessions.**

Month	NERF Training	Roles
November	Part I: Request form data entry	Basic User
December	Part I: Request form data entry	Basic User
January	Part II: Re-priority & approvals	Committee Lead

Security roles have already been assigned and set up in Fusion. For FY26+ cycles, Security roles will be administered by an Executive Level representative.

Read Only	Basic	Committee Lead
Can view NERF requests.	Users are assigned specific cost centers where they can: <ul style="list-style-type: none"> • Enter requests. • Edit requests prior to submission. • Prioritize the requests. • Submit requests. 	Users have Basic User ability plus they can: <ul style="list-style-type: none"> • Edit submitted NERFs. • Re-prioritize. • Approve for their level.

Please contact the following unit leads with any NERF questions or concerns:

- Office of the President and Administration & Finance – [Julia Thomas](#), Dir-Inst Fin Supp Admin Institute Finance Support
- Provost & Research – [Rusty Edwards](#), Sr Dir-Finance Provost & Executive VP for AA