

# Project Approval Form

## Training Guide

**Purpose:** Request for project funding  
(Project could include multiple vendors)

Please complete this process prior to contracting vendors or submitting purchase requisitions.

By submitting project approval forms via the IT Service Portal, requests will automatically route, providing an efficient process. This software also automatically produces a PAF tracker report that shows where all project requests are in the approval process.

### Contact

**Project Finance Team**  
ProjectFinance@holidayinnclub.com

*Holiday Inn*  
*Club Vacations*  
INCORPORATED

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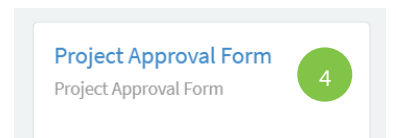
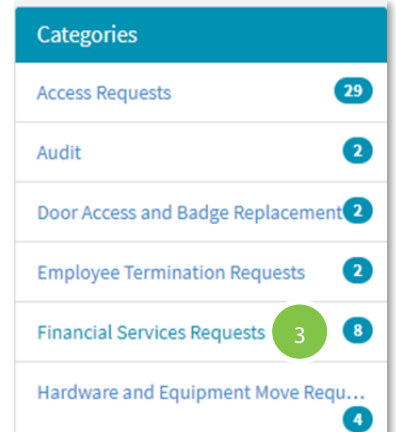
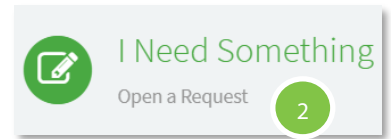
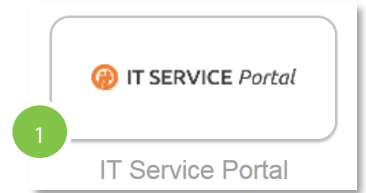
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# Submitting a Project Approval Form

1. Access the **IT Service Portal**
2. Click **I Need Something**
3. Choose **Financial Services Requests**
4. Select **Project Approval Form**
5. Complete all fields on the form
  - **Requested By & Contact Number**—your name & phone number
  - **Is this request for myself or someone else**—if you are creating this request on behalf of someone else, the request will route based on that person’s approval hierarchy and will show up on the other person’s dashboard, instead of your dashboard
  - **Emergency Project Approval Request**—check if your request is incredibly time sensitive
  - **Is this an addendum**— If you choose yes, enter the project ID and the **total prior** requested amount of funding
  - **For what is this request being made**— a descriptive title for the project. ie., “2019 David Walley’s Developer PIP”
  - **Full description**—provide a detailed description of the entire project. Include the scope of the project, the budget this request is being pulled against, etc..
  - **Project Manager**—the person who is financially responsible for the project and will be approving all invoices, requisitions, and POs, within D365 related to this project
  - **Start & End Date**— expected project timeline
  - **Property**—project location
  - **Location**—specific location on the resort
  - **Amount Budgeted**—please include the amount that was budgeted for this project. Note: If this request, or the total project requested amount, including prior PAFs, exceeds the amount budgeted the “additional information” field becomes required for explanation on the overage. If you are requesting funding for an HOA project that is unbudgeted and reserve related, make sure to speak with your HOA Finance Rep and the Reserve Planning Team prior to completing this request.



# Submitting a Project Approval Form Continued

## 6. Continue completing all fields on the form

- **Amount Requested**—amount that is being requested in this project approval form
- **Total Cost**— automatically populates
- **PAF Type**— please contact Project Finance at ProjectFinance@holidayinnclub.com if you have questions about the type. If choosing the Fixed Asset or HOA PAF type, please refer to the following pages to review additional requirements.
  - Enterprise Program Management Office (EPMO)
  - Fixed Asset: Resort Operations (Food & Beverage, Retail, Waterparks, etc), Corporate Offices, Sales Centers, Call Centers, Facilities, Master Restriction etc.
  - HOA: HOA Operations and Reserve (scheduled and incidental) spend—**Note:** must include a Reserve Change Request form for unplanned/unbudgeted spend
    - **There are additional documentation requirements for HOA PAFs. Follow this [job aid](#) for details.**
  - IT: Information Technology Hardware/Software
  - Lease Request: Developer lease
  - Corporate: Corporate Operations (Brand, Legal, Finance etc.)
  - Sales & Marketing
  - Silverleaf Club (TBF): SLC resorts incidental replacement spend
  - Timeshare Development: Acquisitions, New Construction
- **G/L Account**—select if this is being expensed to one or multiple G/L accounts. If one account, please select the account from the drop down. For multiple accounts, or accounts not yet added to the drop down, please use the “additional information” field to provide accounts or attach the G/L breakdown. If you have any questions regarding the G/L Account, please reach out to your respective accounting lead.
- **Additional Information**—provide over budget explanations, emergency request information, or other information pertinent to the request that may answer approver questions.
- **Attachments** - Each PAF submission MUST have an **attachment**. The attachment may include a reserve change request, detailed project budget, quotes, etc.

## 7. Click **Submit**

## 8. Return to the **IT Service Portal** to review approval status

\* Amount Budgeted:

\* Amount Requested:

Total Cost:

\* Type:

-- None --

\* Will this Project Approval Request be covered under one Multiple?

-- None --

Additional Information

This is required if this is an emergency request or if you are over budget.

Submit

# Fixed Asset & HOA PAFs—Additional Requirements

## Fixed Asset

- When the Fixed Asset PAF Type is selected, three required fields will pop-up:
  - Projected In Service Date
  - Legal Entity
  - Condition
- Projected In Service Date**—enter the date that the asset is expected to be put in service. This is required to accurately calculate depreciation.
- Legal Entity**—enter the legal entity that the Fixed Asset will be held under (202 –Master restriction, 201—Corporate developer, 801 – Silverleaf club developer, 322– OLCC Nevada LLC.)
- Condition**- select either Replacement or New.
  - If the requested Fixed Asset will replace an already existing asset, select Replacement.
  - If you are requesting to acquire a Fixed Asset that we do not already have, select New.
- If you select replacement, more fields will populate to complete. This replaces the need to fill out the Fixed Asset Disposal Form. Contact Project Finance to obtain the Fixed Asset Number and identifier.

\* Type: Fixed Asset 1

\* Projected In Service Date: 2

\* Legal Entity: 3

\* Condition: -- None -- 4

## HOA

- When the HOA PAF Type is selected, one required field will pop-up.
- Budget Status** drop-down menu—select either Planned or Unplanned.
  - If the PAF request is a budgeted request, select Planned.
  - If the PAF request is a non-budgeted request, select Unplanned.

**NOTE:** If the HOA PAF Type (Unbudgeted) is selected, the Reserve Change Request form must be filled out and attached as back up to the PAF ticket. You can find the form on the HCVInnSite Portal under Construction Design & Development. <https://hcvinnsite.com/resources/downloadable-files> > **Construction Design & Development > SOP 100.05 Reserve Change Request**

**NOTE:** There are additional documentation requirements for HOA PAFs. Follow this [job aid](#) for details.

\* Type: HOA 1

\* Budget Status: 2

-- None --

Planned

Unplanned

# Reviewing Approval Status

1. Access the **IT Service Portal**
2. Locate your submitted **PAF** under **My Open Requests**
3. Click the **ticket number**
4. Review the **Request Status**
5. **Waiting For Approval**—Approval progress
6. **Stage: Fulfillment**—During the process you will receive an IT Support email that states **Stage: Fulfillment**—this means project finance has this request and is working on it. Based on the details of the request, Project Finance will decide if they will be setting up a project.
7. **Rejected**— If your request was rejected, you will receive an IT Support email stating that your request was **Rejected**. If the user provided a reason for rejecting your request, their comments will be included in the email.
8. **Stage: Completed**—Your project has been approved! You will receive an IT Support email showing **Stage—Completed** once your project is approved. The close notes will contain your Project ID and follow up notes. After 24 hours you can begin entering requisitions in D365 with your new project ID, if applicable.
9. **Project ID**—Can be found in the approval email and on the PAF request via the IT Service Portal. This number should be entered on the header level of project requisitions in D365.

My Open Requests (Needs) 2

Project Approval Form  
RITM0075643 • 3m ago 3

Request Status

- Waiting for Approval (Completed) Approvers 5
  - Brian Corton (No Longer Required)
  - Carol Sheffield (Approved)
  - Jacob Caya (No Longer Required)
  - Kryss Theroux (Approved)
- Fulfillment (Completed) 6
- Completed (Completed) 8

REQ0074285 - Your request has been completed 8

IS IT Support <ITSupport@orangelake.com>  
To Corton, Brian  
Retention Policy 90 Day Inbox (90 days)

**Holiday Inn Club Vacations** IT Technology Services  
INCORPORATED

Click here to view Request: [REQ0074285](#)

Number: REQ0074285  
Opened: 2020-10-05 08:19:03 EDT  
Attachments:  
[Memo Style.pdf](#)

Requested Item Information:  
Item Number: RITM0074399  
Item: Project Approval Form  
Approval: Requested  
Stage: Completed  
Requested By: Brian Corton 9  
Task SCTASK0109699 Close Notes: Project ID: TEST. Please allow up to 24 hours for budget routi

# Frequently Asked Questions

## 1. Can I revise a submitted PAF ticket?

Once a PAF ticket has been submitted it cannot be revised. The original submission will need to be cancelled and a new ticket will need to be created. This is a system limitation that we cannot override.

## 2. I canceled my PAF ticket, why don't I see the "resubmit request" button?

The copy function is only available for PAF requests that have been approved or rejected. If the requestor cancels their request, you will need to create an all new PAF.

## 3. Why does the PAF Type selected matter?

The PAF Type determines who the ticket will route to. If the incorrect PAF Type is selected, then the ticket will not route to the correct approvers.

## 4. What do I do if I'm unsure what the Total Prior Project Approval Amount is?

If you're unsure what the approved budget is for a project, please reach out to Project Finance, [Projectfinance@holidayinnclub.com](mailto:Projectfinance@holidayinnclub.com), so that we can provide you with the correct information.

## 5. I received an email from IT Support stating my request has been completed. Is it approved?

IT Support will automatically send the requestor this email when the ticket has either been rejected or approved. If approved, the requestor will receive an additional email when the ticket has been completed / closed. When the ticket is fully approved and completed, the email will include "Close Comments" that indicate whether or not a project ID was assigned. This information can also be viewed on your Dashboard. Please refer to page 12, step 5. Your request is fully approved / completed when all three items (Approvals, Stage, Complete) have received a green checkmark.

## 6. I received an email from IT Support and the close notes state "Approved. Project ID not required" What does this mean?

This means that your PAF is fully approved and a project ID was not assigned. You can move forward with generating a standard purchase requisition in D365 using the GL Account listed in the approved PAF.

## 7. I noticed on my Service Now Dashboard that my request is in "Fulfillment", what does this mean?

This means that your PAF request has received all the appropriate monetary approvals; however, it is not quite completed. It is within this stage that Project Finance will determine if a Project ID is required. This is the last step in the approval process. Your PAF is considered fully approved once this stage has been completed.

## 8. I am unsure what the coding should be. Who should I contact?

If you're unsure which coding to use, please reach out to your HOA accountant. If you're unsure who the HOA accountant is for your property, please reach out to Project Finance so that we can assist. All other requests, please reach out to [Projectfinance@holidayinnclub.com](mailto:Projectfinance@holidayinnclub.com).

# Frequently Asked Questions

## 9. What are the Silverleaf Club (TBF) resorts?

Apple Mountain Resort, Oak n' Spruce Resort, Fox River Resort, Ozark Mountain Resort, Timber Creek Resort, Holiday Hills Resort, Holly Lake Resort, Lake o Woods Resort, Piney Shores Resort, Seaside Resort, Hill Country Resort, and the Villages Resort.

## 10. What is a Project ID and what do I do with this information?

When your PAF is approved, you will see that your request has moved to "Fulfillment" (Pg 12, Step #5). During this stage, Project Finance is reviewing your PAF to determine if project set-up is required. Please note, not all PAFs will generate a project. If Project Finance creates a project in D365, this number will be provided in the final approval email the requestor receives from IT Support. You will also be able to find this information on the bottom of your ticket within the Service Now Dashboard. The project ID that was assigned will need to be entered when creating a requisition at the "header" level for routing and reporting purposes. If there are any questions related to Project Requisitions, please reach out to [Projectfinance@holidayinnclub.com](mailto:Projectfinance@holidayinnclub.com).

## 11. My PAF was rejected, now what do I do?

Please review the email sent by IT Support / Service Now; this email will include the individual who disapproved the request in addition to any notes they made describing why it was not approved (example: Total Prior Approved Amount in incorrect, incorrect PAF Type, etc.). Go into your Service Now Dashboard and locate the PAF under "Closed" items. On the righthand side under "Request Status" you will see a button called "Resubmit Request". This button will copy the existing request into a new REQ/RITM number; you can then make changes and updates to the copied information. **NOTE:** Attachments do not copy to the new ticket. These will need to be re-added before the new request can be submitted.

# Additional Resources

## Video Training

Check out this 60 minute video for a live walk through of the PAF process: <https://web.microsoftstream.com/video/31446585-5564-4fd4-a0e8-98984858b259>

## HOA PAF Job Aid

There are additional documentation requirements for HOA PAFs. Follow this job aid for details: [https://orangelake.sharepoint.com/sites/PolicyPortal\\_DnD/Shared%20Documents/Task%20Aids/PAF%20-%20Job%20Aide%20Service%20Now%20Attachments%20HOA-TBF%20Guide%202.11.21.pdf](https://orangelake.sharepoint.com/sites/PolicyPortal_DnD/Shared%20Documents/Task%20Aids/PAF%20-%20Job%20Aide%20Service%20Now%20Attachments%20HOA-TBF%20Guide%202.11.21.pdf)

## Reserve Change Request Form

If the HOA PAF Type (Unbudgeted) is selected, the Reserve Change Request form must be filled out and attached as back up to the PAF ticket. You can find the form on the HCVInnSite Portal under Construction Design & Development. <https://hcvinnsite.com/resources/downloadable-files> > **Construction Design & Development** > **SOP 100.05 Reserve Change Request**