Change Network Meeting: October

October 26, 2022
Change Network Agenda

October 26, 2022

• Supply Chain: Purchase Reqs & POs, Payment Cards, and Check Requests
• Diana’s Demos
• HR Data Stabilization Process Begins
• Shared Experience: Notifications
• Tecsys Update
• Leader-led Actions
• Q&A
FY24 Budget
Budgeting Update

• FY24 budgets will be created using our current tools (eBudget, Budget Forecast Tool)
• Training for FY24 will be offered beginning in January
• Workday Adaptive Planning, summer 2023
• FY24 Q1 Forecast (centrally)
A bit more on Purchase Orders...
Workday Purchase Requisitions: Think ahead strategically

**Workday Purchase Requisitions should be created to align with the invoice that will be matched to the Purchase Order. If not created correctly, POs will be closed prematurely or may require manual closure.**

If purchasing 3 items for your computer setup.....

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Description</th>
<th>Cost per item</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Computer Setup</td>
<td>$300</td>
<td>$300</td>
</tr>
</tbody>
</table>

If the supplier sends and invoices one item (before the other 2 items), the PO will close out because the quantity (1) has been met.

This PO would remain open until all items are received.

The Requisition should be created like this:

<table>
<thead>
<tr>
<th>Quantity</th>
<th>Description</th>
<th>Cost per item</th>
<th>Total Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Computer equipment</td>
<td>$100</td>
<td>$300</td>
</tr>
</tbody>
</table>
Payment Cards
Post go-live, all VUMC payment cards will be processed within Workday.
Payment Cards: Key Changes

• Cardholders and their managers will review and approve charges within the Workday Expense Report module

• Payment card transaction review and approval is part of the HR Supervisory Organization manager role in Workday

• Workday HR Manager will review and approve transactions for any payment cardholders who report to them directly
Payment Cards: Key Changes

- All purchases made with a VUMC payment card will be listed within the Expense Report module as Credit Card Transactions, usually within three (3) business days.
- Cardholders will be required to submit all card charges monthly, uploading receipts as necessary per policy.
- Electronic approvals and receipts within Workday will replace current-state 'PCard Binders'.
Payment Cards: Workflow

• Expense report transactions will be routed automatically in Workday, based on the attributes of each expense.

• After HR Manager approval, payment card transactions will be routed as applicable to a Cost Center Manager, Grant Manager, or for any additional approvals such as dollar amount.

• This approval functionality means that with Workday, payment cards will be an approved form of payment for grant purchases after Workday go-live.
Check Requests
“Check Requests” in Workday

Supplier Invoice Requests in Workday will be taking the place of check requests.
When to use **Supplier Invoice Requests**

Most goods and services should be purchased from VUMC approved suppliers using a Purchase Requisition/Purchase Order in Workday or via a payment card.

**Workday Supplier Invoice Requests should be used for***:
- 3rd Party Clinical Services (Imaging, Testing, Dialysis)
- Advertising Costs (Non-Agency Contracts)
- Contributions/Donations/Sponsorships Insurance
- Insurance & Patient Refunds
- If payment is direct to an organization:
  - Prof’l Licensure/Registry/Certification/Memberships/Training
  - Registration Fees
- Risk Management
- Royalties
- Settlements/Attorneys/Legal Services
- Subscriptions/Books
- Taxes

* This list is for example purposes only and will evolve as we further prepare for Workday go-live.
Performance Central and HR
Data Stabilization Update
Download Your Team’s Historical Annual Evaluations

Performance Central will no longer be accessible after **November 30, 2022.**

- The last 3 years of evaluation rating data will be brought into Workday

- After November, full details of historic annual evaluations will be accessible only by HR for audit and regulatory purposes

- Download PDF copies of your team members’ historical annual evaluations from Performance Central **before November 30** (for full details)
HR Data Stabilization Process Begins...

- November 2022: Annual Increase process preparations begin
- February 2023: Workday final snapshot for go-live environment following annual increases

**Change Impacts**
- Requires manual entry in multiple systems
- Duplication of Effort
- Risk that systems will not be in sync

**Continued changes pose significant risk to**
- Workday implementation April 2023
- Paying employees correctly in Workday
HR Data: Workday Preparation Freeze & Annual Increase Processing

- **By November 1, 2022:** All job code requests to be submitted to Compensation
  - New job codes requests including job descriptions
  - Existing job code edits, and restructures

- Complete all job changes/reclassification for employees this month (October)
  - **By November 7:** Submit non-exempt job changes via ePAC with an October 23rd effective date
  - **By November 9:** Submit exempt job changes with a November 1st effective date or earlier
Job Code Requests after November 1st...

- Work with your HR Business Partner

- Job code requests (new or modifications) after November 1\textsuperscript{st} will be considered as rare exceptions and require the approval of:
  - Service Delivery Director,
  - in coordination with the entity leader, and
  - The Chief Human Resources Officer

- Requests for job changes/reclassification that are placed on hold during transition will be
  - tracked by Compensation (in the Job Code Request Smartsheet)
  - reviewed following the Workday go live
  - processed in Workday after a period of stabilization
Shared Experience: Notifications
Workday Notification Types

There are three types of Workday-generated email notifications:

- **Informational Notifications**: Informational in nature; do not require the user to perform an action

- **Action Alert Notifications**: Generated when an action item appears for a user; requires the user to log into Workday to perform an action

- **Overdue Reminders**: Generated when an action item has passed its due date; reminds the user to log into Workday to perform the action
VUMC Workday Notifications

Default setting for email delivery of Workday notifications will be a **Daily Batch** *(Delivery time TBD)*

Users will be able to update preferences to **‘Immediate’** for Action Items

Users will be able to update preferences to **‘Immediate’** or **‘Mute’** for Informational Items
Workday Notifications

Workday Inbox (real time):

Outlook email (Default, Daily Digest):

Workday Inbox - Your Daily Digest

vumc2 <vumc@myworkday.com>
To: MyWorkday Test Notifications

**Daily Digest for Claudia Fontaine**
Friday, October 7, 2022

**2 Action Items (s)**

**Click Here to sign-in to Workday**

**Action Items (2)**

**A To-Do Awaits you: Expense Report Approval**
Business Process: Expense Report Approval
Subject: Expense Report: J Doe December Expenses
Click Here to view the notification details.

**A To-Do Awaits you: Time Off Approval**
Business Process: Time Off Request: Cornelius Vanderbilt (0000001)
Subject: Time Off Request: Vanderbilt 2022 12 22
Click Here to view the notification details.
Tecsys Update
Tecsys Day-in-the-Life Testing (DIL)

- Testing to validate functionality supports a typical day of usage
- Performed by end-users (VUMC Tecsys Super Users/Testers) using actual business processes

❖ **VUMC’s DIL Schedule:**

<table>
<thead>
<tr>
<th>Date</th>
<th>Location</th>
<th>Participants</th>
</tr>
</thead>
</table>
| November 8, 2022   | **Adult:** Procedural Areas, OR, IP & Supply Chain  
                     **Children’s:** Procedural Areas | Super Users/Testers by Clinical Leaders                      |
| January 10, 2023   | **Wilson County:** Procedural Areas, OR, IP & Supply Chain | Super Users/Testers by Clinical Leaders                      |
| February 7, 2023   | **VTHH & VBCH:** Procedural Areas, OR, IP, & Supply Chain  | At-the-Elbow (ATE) support                                    |
At-The-Elbow Support

Areas affected by the Tecsys implementation will have designated At-the-Elbow Support who will act as system experts and provide peer-to-peer support.

Please update this list for your local At-the-Elbow Support:

<table>
<thead>
<tr>
<th>Description</th>
<th>eStar Nursing Doc Support Needed</th>
<th>Room(s)</th>
<th>Cost Centre</th>
<th>Notes</th>
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<tbody>
<tr>
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<td>Yes</td>
<td>1739</td>
<td>201778000</td>
<td>X</td>
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<tr>
<td>YUHAI PROC GI</td>
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<td>14/09/10/10/14/19/14/12/14/91</td>
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</tr>
<tr>
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<td></td>
<td></td>
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<tr>
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<tr>
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</table>

Note: Ensure all shifts are covered and please include any additional notes pertinent to the support needs.
Clinics that receive their tissue from another VUMC location and store it, will have their tissue received in a POU hospital.
  • Manual documentation (log) at clinic
  • Tecsys documentation by auditing team
  • Clinic will use Tecsys for Tissue Log Report when needed
  • These tissue storage locations may be physical (p) or virtual (v)
    • These clinics include: Belcourt Oral (v), Bedford Wound Care (p), VOF Clinic (v), Tullahoma Wound Clinic (v)

Clinics that receive their tissue from another VUMC location, but DO NOT store their tissue.
  • Clinics will not use Tecsys
  • Any usage will be part of the main hospital inventory
    • These clinics include: TVC3 - wound, MCE4, Vanderbilt Eye Institute

Clinics that receive their own tissue will have access to Tecsys.
  • These clinics include: Brentwood & Hendersonville
Leader-led Actions
Leader-led Actions for October

- **Share the October Change Network Department Presentation** with your team

  **HR Data Stabilization**: Submit all job code requests to Compensation by 11/01. Complete all job changes/reclassification by 11/7 (non-exempt) and 11/9 (exempt).

- **Download PDF copies** of historical annual evaluations by 11/30 for full details.

- **Identify Tecsys At-the-Elbow** support by 11/6 (At-the-Elbow Support)

- **Continue with Kanban static board procedures** in Kanban locations that have been rolled out (see resources [https://www.vumc.org/pou/training](https://www.vumc.org/pou/training)).

- **PO cleanup continues**: Clean up purchase orders (POs) by closing older, inactive POs now to prepare for the transition to Workday. [PO Reference Guide](https://www.vumc.org/pou/training) If you have a blanket PO, extend it.
Thank You