Change Network Department Presentation

November 2022

Agenda

November 30, 2022

- Scope & Guiding Principles
- HR Topics
- Delegation
- Training Plan
- Cutover
- Q&A

MyWorkday Program Scope

Human Resources
Talent Acquisition
Onboarding
Benefits
Compensation
Absence
Learning
Payroll
Workday Help

Finance
Fixed Assets
Project Accounting
Tax & Treasury
Budgeting
Forecasting
Capital Planning

Supply Chain
Strategic Sourcing
Contract Management
Requisitioning
Purchasing
Expense Reimbursement
Warehouse Management
Inventory Management
Point of Use

Research & Grants
Receive, Disburse, & Account for Grant Funds
Monitor Funding Program Performance
Collect Data & Report on Funding Activities

Change Management & Training Comprehensives readiness approach to support implementation and transformation

Dashboards, Reporting, & Data Analytics Designed to support operations decision making process

Security Considerations for the overall application strategy and future architecture

Guiding Principles

1 User-Friendly

We will create an experience that is intuitive to the customer and enhances their day-to-day processes, allowing for operational efficiency

2 Standardized

We will standardize Human Resources, Finance, Supply Chain, and Grants administrative processes across the organization to align to Industry best practices

3 Automated

We will seek automation to enable optimal efficiency, leverage best practices, and maximize worker productivity

4 Integrated

We will pursue an integrated system across functions to create seamless workflows and standardize data

5 Future - Focused

We will create a scalable platform that will support and empower future growth of the organization

HR Topics

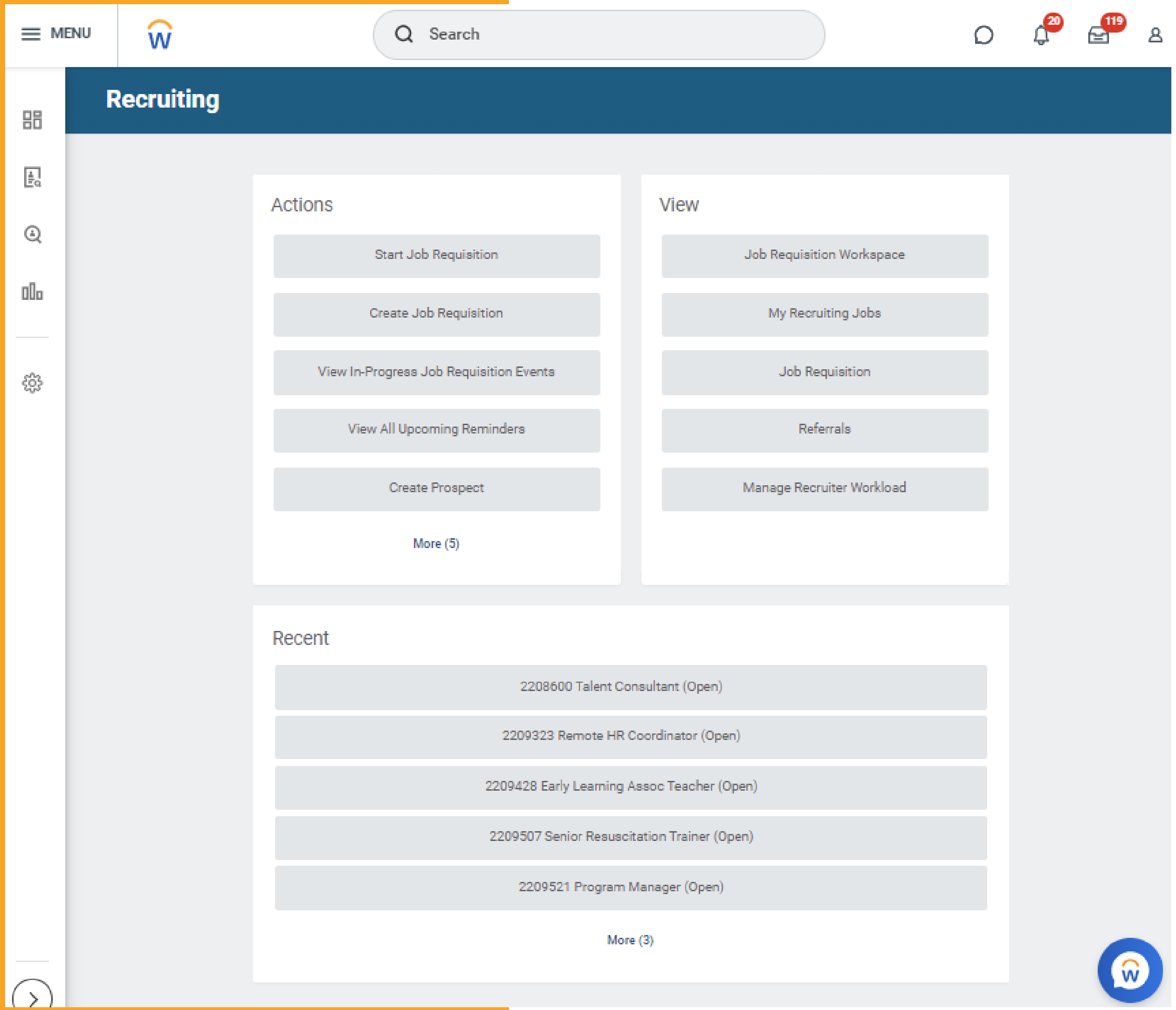
Position Requisition

The create position requisition process is where a manager initiates a requisition for posting for recruitment of a job.

Key Items to Note:

- Process is used primarily for STAFF positions
- Information will default from the existing position, including the job profile (job description & minimum qualifications)
- Important to validate the accuracy of the information, including the default cost center
- Process will also include the requisition approval process by entity and executive leaders based on cost center productivity

Recruiting



- Work with your recruiter to finalize your job posting
- Able to use the dashboards to view the status of your requisitions and the applicants
- Offers to candidates will be initiated and accepted within Workday
- Once an offer is accepted the background process will be kicked off as well

Recruiting Dashboard

Recruiting

My Recruiting Jobs

Job Requisition	Candidates in Review Stage	Active Candidates	Recruiting Start Date	Hiring Manager	Supervisory Organization	Target Hire Date	Recruiter
2208152 Quality Review Specialist (Remote Work Options) (Open)	0	84	06/14/2022 - 5 months ago	[redacted]	CPPA Operations - Sebes Department (Mary Sebes (0061403))	09/12/2022 - 2 months ago	Donna Booker (0013478

View More ...

My Interviews

View More ...

Candidate Time Per Stage

1

Manage Job Requisitions

Job Requisition	Day(s) Open	Hiring Manager(s)	Recruiting Start Date	Count of Active Candidates	In Offer
2208152 Quality Review Specialist (Remote Work Options) (Open)	168 days ago	[redacted]	06/14/2022	84	No
2208097 Program Manager, CORS (Remote work options) (Open)	168 days ago	[redacted]	06/14/2022	0	No

View More ...

Candidate Pipeline

Job Requisition	Review	Screen	Reference Check	Interview	Reference Check (DNU)	Offer	Employment Agreement	Background Check	Declined by Candidate	Rejected
2208152 Quality Review Specialist (Remote Work Options) (Open)	0	84	0	0	0	0	0	0	0	1
2208097 Program Manager, CORS (Remote work options) (Open)	0	0	0	0	0	0	0	0	1	51
Total	0	84	0	0	0	0	0	0	1	52

View More ...

Source Effectiveness

Candidate Pipeline

Create Candidate Pool

Interview

View All Upcoming Candidate Interview Reminders

Compliance

My Candidates

Source to Pipeline

Source	Review	Screen	Reference Check	Interview	Reference Check (DNU)	Offer	Employment Agreement	Background Check	Ready for Hire	Declined by Candidate
Social Referral -> LinkedIn	0	33	0	0	0	0	0	0	0	0
Job Search Web Site -> Indeed.com	0	34	0	0	0	0	0	0	0	1
Our Web Site -> VUMC Jobs	0	7	0	0	0	0	0	0	0	0
Other -> Give 'Other' Explanation	0	8	0	0	0	0	0	0	0	0
Job Search Web Site -> Glassdoor	0	2	0	0	0	0	0	0	0	0
Total	0	84	0	0	0	0	0	0	0	1

View More ...

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Hiring and Onboarding: Highlights

- Hire process is done within Workday
- All hires for Staff and Tempforce must be done through the requisition process.
- The hire process for Faculty, Housestaff and Contingent Workers is very similar to the staff process but does not require the recruitment requisition.
- Onboarding process does not begin until the hire is complete, including all approvals, which includes background clearance.
- Once the hire is complete, onboarding checklists are generated for the hiring manager and the new hire within Workday.

Hiring and Onboarding: Highlights (continued)

Key Items to Note:

- Since we combined many of our systems into one system, many onboarding processes will be done within Workday, no more Onboarding Portal
- During the onboarding process the new hire will have access to Workday to start tasks

New Hire Checklists:

- Start I-9
- Benefits Enrollment

Manager Checklists:

- Option to send a notification to the new hire about People to Meet and Helpful Contacts
- Other reminders of items to do for a new hire

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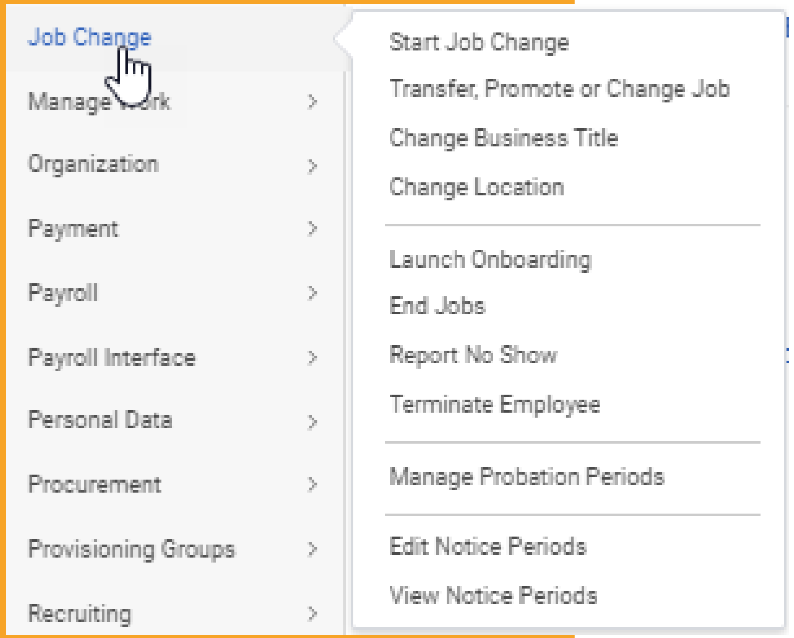
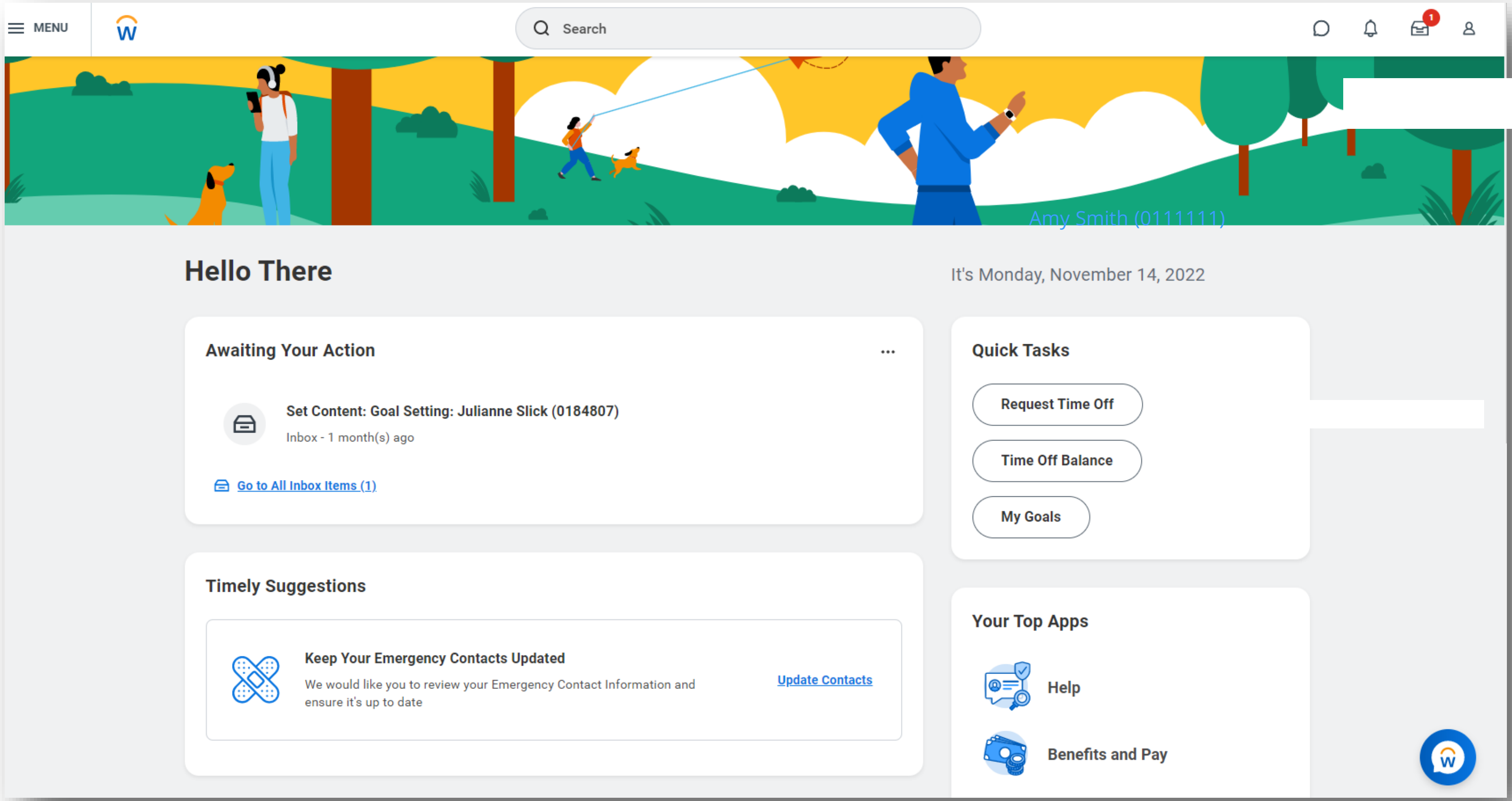
Job Changes



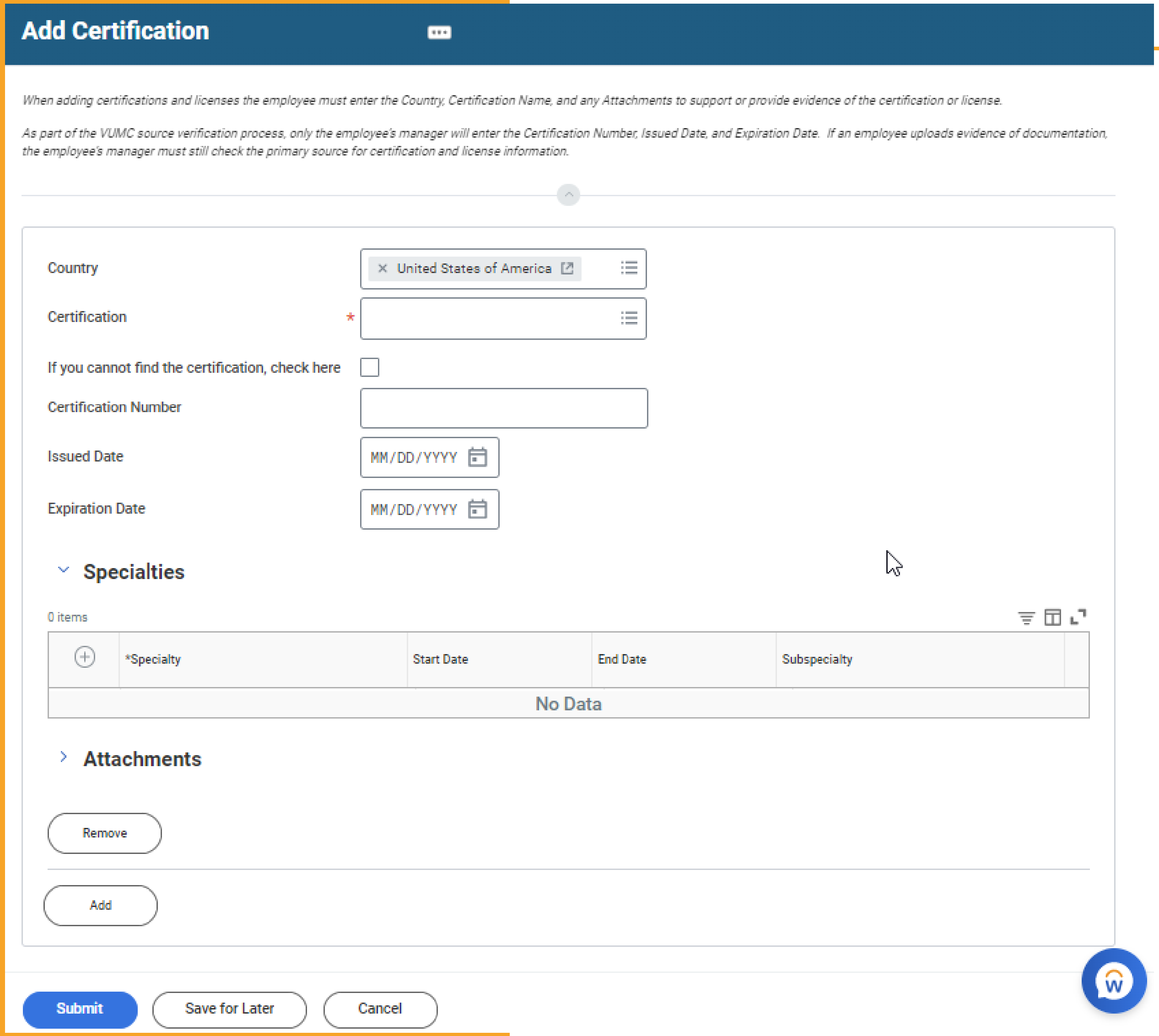
Created templates to simplify the process for certain job changes:

- Change Work Location (i.e., working remote)
- Change Scheduled Hours (full time/part time)
- Position Reclassification
- Transfer: New Supervisory Organization
- Lateral Move (another position on same team)

Maintaining Employee Data (Employee Self-Service)



Licensures & Certifications


Add Certification

When adding certifications and licenses the employee must enter the Country, Certification Name, and any Attachments to support or provide evidence of the certification or license.

As part of the VUMC source verification process, only the employee's manager will enter the Certification Number, Issued Date, and Expiration Date. If an employee uploads evidence of documentation, the employee's manager must still check the primary source for certification and license information.

Country: United States of America

Certification *

If you cannot find the certification, check here

Certification Number

Issued Date: MM/DD/YYYY

Expiration Date: MM/DD/YYYY

Specialties

0 items

*Specialty	Start Date	End Date	Subspecialty
No Data			

Attachments

Remove

Add

Submit | Save for Later | Cancel

- Workday functionality will replace CATS (Credentials Application Tracking System)
- Allows employee to enter the license and/or certification information and have the manager review and approve
- Manager enters certification number, issued date and expiration date as part of the source verification of the data
- Notifications regarding expiration will also be sent through processes triggered by Workday

Offboarding

- A termination can be initiated by the manager, or an employee can submit their resignation within Workday and it will be routed to the manager.
- Once the termination is processed, both the employee and the manager will receive offboarding checklists as tasks within Workday.
- After termination, individuals can still access Workday for a period of time to obtain their pay and W-2 information. They will use their personal email address as part of the login process.

Contingent Workers

- Also known as "Non-Employees"

- Will be entered into the system by department manager and will exist within the supervisory organization structure of the department.

- Departments will be responsible for the onboarding and offboarding of these individuals.

- In most cases, individuals who need a VUMC ID will need to be entered into Workday as a contingent worker to obtain this access.

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Shared Experience: Delegation

Refresher on Delegation in Workday

Delegation is the *temporary* assignment of another person to act on your behalf to carry out specific activities.

- Does not remove responsibility/ownership for the task from the user it was initially assigned to
- When delegation period ends, any incomplete delegated tasks revert to the original owner
- Delegation does not provide reporting access to the delegated user

Delegation Approach for VUMC

Delegation can occur within a **supervisory organization** and is not a permanent transfer of responsibilities

Delegation is **temporary**

Employees may delegate to **peers or superiors** with *no approval required*

Delegation to **subordinates** will be require an *approval process* within Workday

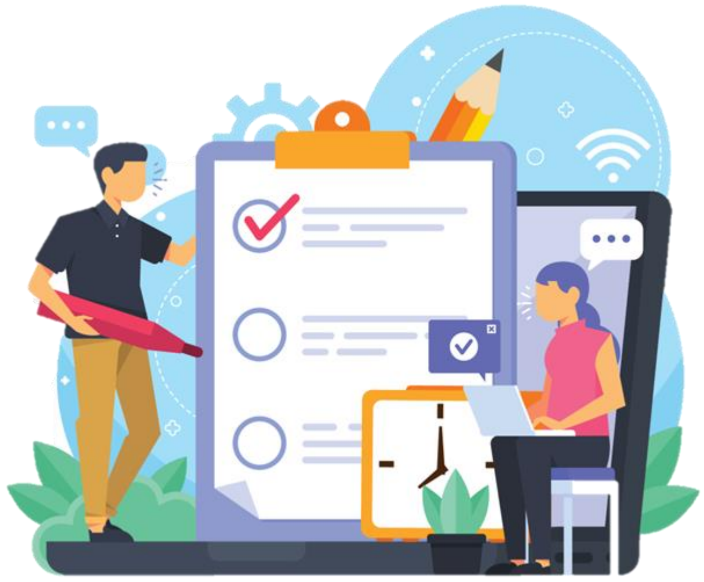
Delegation

All Employees may delegate:

- "**Start** On My Behalf": Create Expense Report

Managers may delegate:

- "**Start** On My Behalf"
- "**Do** Inbox Tasks"



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Workflows Managers can Delegate

Start on my behalf these workflows:

- Start Job Change
- Start Job Requisition
- Create Position
- Edit Position
- Hire Employee
- Request Transfer
- Contract Contingent Worker
- End Contingent Worker Contract
- Enter Absence
- Report No Show
- Request Compensation Change
- Terminate Employee
- Terminate for Review Probation Period
- Terminate from Submit Resignation
- Accounting Adjustment Event
- Accounting Journal Event
- Assign Costing Allocation

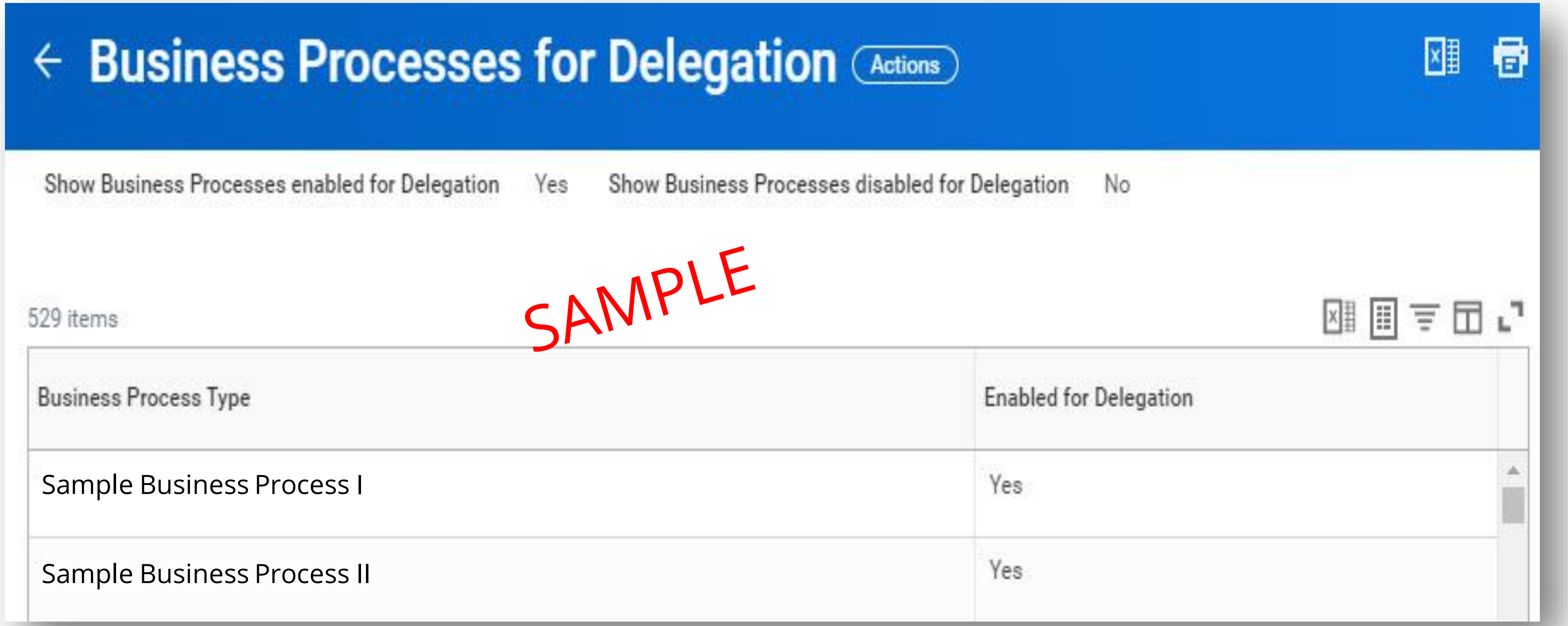
Workflows Managers can Delegate

Do Inbox Tasks on my behalf for these workflows:

- Change Job
- Contract Contingent Worker
- Correct Time Off
- Create Position
- Edit Position
- Edit Position Restrictions
- End Contingent Worker Contract
- Expense Report Event
- Hire
- Job Requisition
- Offer
- Onboarding
- Post Job
- Propose Compensation Change
- Request Compensation Change
- Request Leave of Absence
- Request Return from Leave of Absence
- Request Time Off
- Termination
- Update Job Posting
- Accounting Adjustment Event
- Accounting Journal Event
- Assign Costing Allocation

Which Business Processes Allow Delegation?

- A select list business processes have been enabled for delegation
- Business Processes for Delegation Report



Training Plan

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Departmental Training Plan - Summary

eLearning Modules – Available in LMS

- Supplemental Quick Reference Guides

Role-Based Go-Live Readiness Sessions

- Key security roles
- Virtual beginning in March 2023

WalkMe Smart Walk-thrus

- Demo walk-thru available in January

Workday Training Assignments

Workday curricula in the LMS will role-based.

Examples*:

- Employee as Self/Individual User
- Manager/People Leader
- Cost Center Manager
- Departmental Grant Manager

** This is not a comprehensive list of all role-based curricula to be offered.*

Cost Center Manager (CCM) Role

You have been assigned the role of **Cost Center Manager (CCM)**. This document contains information specific to your role.

This role is the cost center level approver for the following business processes:

- Expense Reports
- Journal Entries
- Purchase Requisitions
- Supplier Invoices
- Payroll Costing Allocation
- Accounting Adjustments

Online Training is available in the Learning Exchange by clicking the links below:

- WDES-100: Introduction to Workday
- WDES-101: Workday FDM
- WDES-102: Role-Based Security and Delegation
- WDES-105: Workday Reporting
- WDSC-101: Supply Chain Overview
- WDSC-501: How to Purchase
- WDFI-206: Analyze and Review Expenses
- WDFI-207: Payroll Costing Allocations

Reports are available by typing the following report name* in the search field:

- Budget vs. Actual by Cost Center
- Budget vs. Actual by Revenue Category
- Expense Journal Lines
- Find Purchase Orders
- Find Supplier Invoices
- Income Statement
- General Ledger Activity Summary
- Ledger Detail
- Ledger Account Summaries Report
- Ledger Account Activity Summary

**This is not a complete list. Note that access to report data is based on role in Workday*

Quick Reference Guides are available within the Resources tab of the respective online module or by clicking the links below:

- Glossary
- Foundational Data Model (FDM)
- Role-Based Security
- Delegation
- Mobile
- Reports
- Approving Expense Reports

Smart Walkthrus are available for the following business processes by clicking Show Me How within Workday:

- Delegate Inbox Items/Business Process
- Create Expense Report
- Approve Expense Report
- Payroll Costing Allocation
- Create Purchase Requisition
- Approve Purchase Requisition
- Create Supplier Invoice
- Approve Supplier Invoice
- Create Journal Entry
- Run Report

Additional Information is available using the links below:

- Security Role questions - submit a Pegasus ticket here
- Cost Center Translator
- Reporting Crosswalk
- What's Changing with Workday
- Workday Training Hub
- Quick Reference Guides
- Training Questions: email **BusinessEducation@vumc.org**

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Last Updated 11/28/2022

Workday Foundational Courses

Introduction to Workday (10-15 minutes)

- Online module recommended for all users
- *Pre-requisite for any other Workday training*

FDM Module (20-30 minutes)

- Online module recommended for those who impact financial transactions
- *Pre-requisite for any Financial or SCM Workday module*

Tecsys Training

Role-based online curriculum assignments (LMS)

- **Inpatient**
- **OR & Procedural Clinicians** (includes Surgery Centers GI/Endo, Cath Lab, Interventional Radiology (IR), OR TAs, OR Billing Auditors, CSOR)
- **Case Cart Operations** (includes SPD, CSOR, Surgery Centers)
- **Supply Chain** (includes Materials Management & Receiving Staff)

Cutover

Training: What’s happening? Videos

MyWorkday Implementation

Welcome | What's Changing | **Training Hub** | Change Network | Communications

Training Hub

- What's Happening Videos >
- Quick Reference Guides >
- Instructor-Led Training >
- Legacy Systems: Action Steps >

- Location www.vumc.org/myworkday/training-hub
- What’s Happening? [What's happening with Cutover?]

5 Things to Know About MyWorkday

MyWorkday Infographic

Use this infographic to share the MyWorkday story [5 Things to know about MyWorkday]

Questions?

Thank You