

**Deloitte.**

VANDERBILT  UNIVERSITY  
MEDICAL CENTER

The logo for myworkday features the word "myworkday" in a lowercase, sans-serif font. The "my" is colored orange, and "workday" is blue. A thick orange arc is positioned above the "workday" portion of the text.

**Change Network Meeting: February 7, 2023**

# Change Network Agenda

February 7, 2023

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- Cutover
- Finance: Department Reporting
- Change Impacts
- Workday Help
- Training & Super User/ATE Update
- Leader-led Actions
- Q&A

**Cutover**

# Cutover



February

- Began Production tenant build

Mid-February

- Legacy Data Snapshot
- Production Data Conversion begins

Mid-March

- Workday Release R12023
- Catch-Up Transactions

Late-March

- Kronos update
- Hard Freeze

April 1

- Go-live
- Resume most normal operations



# Workday Terminology

# Terminology in Workday: Visit the Glossary on the Training Hub

Workday Term	Current Term	Definition	Notes
<b>Accounting Adjustment</b>	Journal Entry	Journal entry in Workday to adjust entries between worktags or transactions created by workflows within Workday.	
<b>Manual Journal Entry</b>	Journal Entry	Adjustments to entries created by systems integrating with Workday	Offline form sent to central office for Workday entry.
<b>Payroll Costing Allocation</b>	EDC (electronic distribution change)	Used in Workday to adjust salary distribution amounts/percentages for the current and/or future fiscal periods.	
<b>Payroll Accounting Adjustment</b>	RDC (retroactive distribution change)	Used in Workday to adjust salary distribution amounts/percentages for closed fiscal periods.	
<b>Supplier Invoice Request (SIR)</b>	Check Request	Used for payment of Non-Purchase Order goods and services	
<b>Miscellaneous Payment (MP)</b>	Check Request	Used only for Guest Speakers, Honorariums, Insurance claimant, Patient Refunds, Sign on Bonuses, or Subject Participants.	Offline form sent to central office for Workday entry.

# Finance: Department Reporting

# Employee Level Detail within Financial Statements

## Clinical Enterprise Performance - Patient Days

Financial Performance

Company for Organization Reporting: Vanderbilt University Medical Center | Organization: Cost Center: CC01090 MCJCHV NICU

Criteria View by: Employee as Worktag and then by: Select a Field... Refresh

CR Fin Clinical Enterprise Performance - Patient Days

252 items

Ledger Account	Current Period Actuals	Current Period Budget	Current Period Variance	Current Period	YTD Actual	Total	
						Sum of Transaction Debit minus Credit	Sum of Transaction Credit Minus Debit
Full Time Equivalents (FTE)					993		
Traveler FTE					647		
Total Expense per Primary Unit of Service					10,800		
Gross Revenue per Primary Unit of Service					0		
FTE per Primary Unit of Service					09,550		
Total Salary and Fringe per Primary Unit of Service							
Operating Revenue							
Patient Service Revenue	36,8						
Academic and Research Revenue							
Other Operating Revenue							
Total Operating Revenue	36,8				09,550		
Operating Expenses							
Salaries, Wages, and Benefits	2,8				8,429,178	7,482,105	(947,073) (13%) 7,593,65
Supplies and Drugs	3				950,918	695,550	(255,368) (37%) 715,53
Services and Other					137,160	105,729	(31,431) (30%) 113,23
Facilities and Equipment					53,891	14,313	(39,578) (277%) 3,31

View By: Bill Area, CARTS, Cost Center, Employee as Worktag, Function Code, Fund, Grant, Journal Source, Ledger Account, Operating Entity

View Details, Export to Excel (All Columns), Export to PDF

If an end user receives access to the data, they will be able to slice and dice the data within the financial statements by Employee. If an end user does not receive access to the data, the employee level detail will be blank.



# Roles and Viewing Rights in Financial Reporting

## Cost Center Manager

View Financial Results

View Journal Details

View SCM Data and Reports

View Employee Level Detail on Payroll Journals

## Cost Center Financial Analyst with Payroll Details

View Financial Results

View Journal Details

View SCM Data and Reports

View Employee Level Detail on Payroll Journals

## Cost Center Financial Analyst

View Financial Results

View Journal Details

View SCM Data and Reports

# Obligations and Commitments

Within Workday, options are available to create Obligations and Commitments in the General Ledger based on supply chain or payroll data. Within accounting, an obligation is a commitment to pay a third party based on a business contract, for example Purchase Orders.

## Supply Chain

- Approved Purchase requisitions create Commitments
- Approved Purchase Orders result in an Obligation
- Obligations are relieved as Invoices are paid on Purchase Orders, or by closing the Purchase Orders

## Payroll

- Obligations are built based on information within the job record such as Standard Working Hours, Salary, pay group, hire and termination dates, and payroll costing allocation\*
- Obligations will build for one fiscal year on cost centers, and up to 3 fiscal years on sponsored research funding
- Obligations are relieved by the actual payroll run

\*Payroll Costing Allocations would be Earnings Distributions in our legacy environment

# Change Impacts

# Change Impact Analysis

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## CHANGE IMPACT ANALYSIS

WORKDAY AND TECSYS IMPLEMENTATION IMPACT TO END USERS

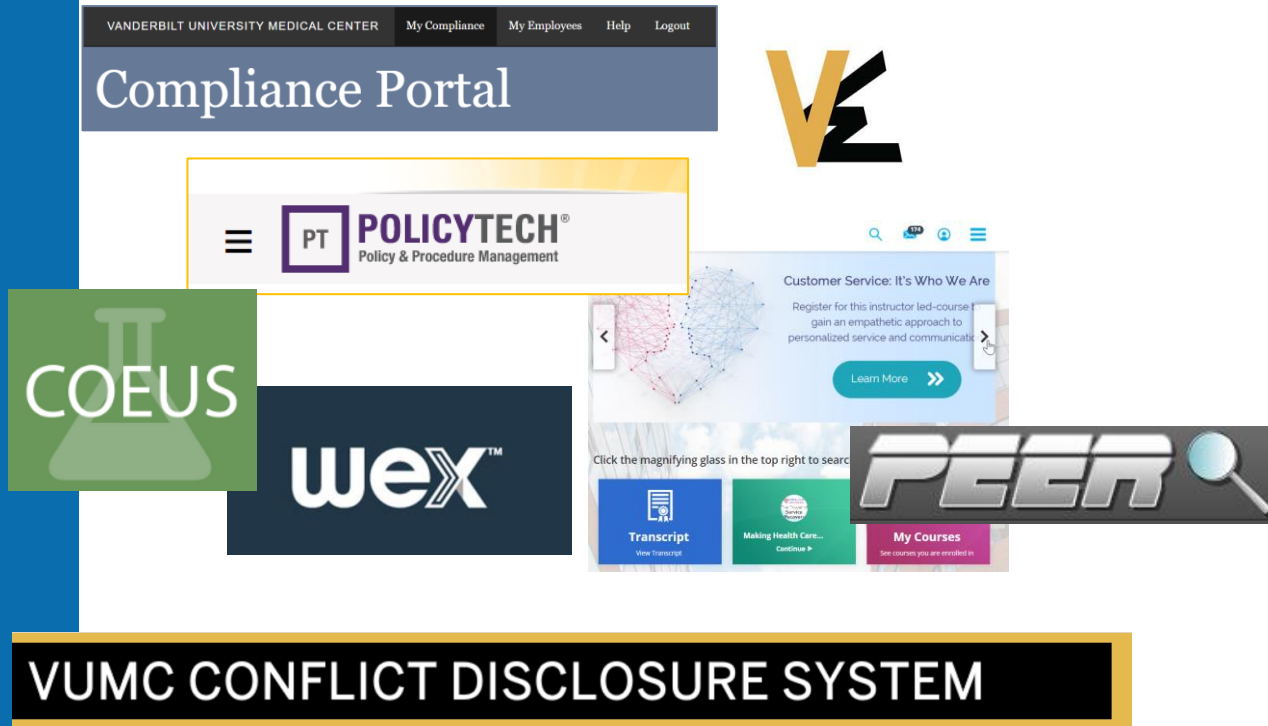
*Prepared by the Change Management & Training Team*

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<https://www.vumc.org/myworkday/cutover>

# Some of what is not going to be retired with MyWorkday...



- PolicyTech
- Compliance Portal
- Conflict of Interest (COI)
- Learning Exchange
- FSA account management
- iLab
- COEUS
- VandyWorks
- PEER
- Kronos Workforce Analytics
- eSmart

# What is changing a bit...

## **Concur:**

- Continue to use to book business travel
- Expense reporting will move to Workday

## **Kronos:**

- Exempt staff will use Workday for time-off requests approvals
- Some changes to pay codes and cost centers will impact non-exempt users
- Kronos training will be available later this month for timekeepers and non-exempt staff



# Workday Access Points: How will I log in?

# Tecsyst Access within eStar

- Tecsyst will be accessible directly from within eStar

A screenshot of the Epic eStar interface. The top navigation bar includes various icons for Orders, Flowsheets, Avatar, MAR, Chart Review, StarPanel Viewer, Immunizations, Future Outpatient, Intra-op, and Tecsyst. A red arrow points to the Tecsyst icon. Below the navigation bar, the patient information for "Twentyeightadul Tecday" is displayed, including MRN: 047664201 and PCP: John Paul Peach, MD. The main content area shows "Case Documentation for the OR" for Case 5414625, with a table of items and their quantities.

Item	Quantity	Unit	Category
HANDLE CHANGE A BLADE SIZE 3 SAFETY	2		Surgical scalpels or knives or blades or
PENCIL ROCKER SWITCH W/ EZ CLN TIP	0		Electrosurgical or electrocautery access
SET BASIN SURGICAL	1		Surgical specialty procedure packs
SHAFT BIXCUT REAMER 8.0X450MM	0		Surgical power reamers
SOL CHLRAPRP 2PCT 26ML ORANGE TNT	1		Surgical scrub or prep kits for patient
SOL NAACL 0.9PCT IRRG BTL 1000ML	1		Drugs and Pharmaceutica
STAPLER SKIN ROTATING WIDE 35	0		Medical staplers for exte nal use
SUTURE VICRYL 2-0 CTD CT-1 36IN	0		Sutures
SYRINGE IRRIGATION BULB 60ML STERILE	0		Medical aspiration or irrigation syringe
TOWEL SURG OPERATE STR	1		Surgical towels



# Workday & Tecsyst Desktop Icons & Network Access

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- Desktop icons will be available on administrative, clinical, and virtual workstations
  - At go-live, the link will direct end users to the Workday login page
  - Prior to go-live the link will direct user to a temporary landing page
  
- Desktop icon deployment will begin February 13
  
- Users must be on a VUMC network or connected through VPN (BIG-IP Edge Client) to access full system functionality

# Workday Access Points

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A Workday banner will be placed on the following websites directing users to the Workday login page (~March 27<sup>th</sup>)

- [Vanderbilt University Medical Center | \(vumc.org\)](http://vumc.org)
- [VUMC Office of Finance](#)
- [VUMC Human Resources](#)
- [MyWorkday Implementation \(vumc.org\)](http://vumc.org)
- [VUMC Information Technology](#)
- [HealthIT \(vumc.org\)](http://vumc.org)



Workday Mobile App is not recommended for go-live.



# Workday Demo: Workday Help

# Workday Help for HR Questions & Issues

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Workday Help is part of the Workday People Experience and includes a Case Management Tool with:

- Case tracking
- Response time tracking
- Case Escalation
- Resources/Knowledge Articles
- Replaces [Human.Resources.VUMC@VUMC.org](mailto:Human.Resources.VUMC@VUMC.org)



# Training Update

# Kronos Training

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## Timekeeper Online Training

- 'Workday Changes to Kronos' (online module)
- Enrollments week of Feb. 20th
- Readiness sessions

## Timekeeper Readiness Sessions (keyword: KronosWD)

- February 21
- March 1
- March 7
- March 15

## Non-Exempt (Paid Hourly) Staff Online Training

- 'Workday Changes to Kronos' (online module)
- Enrollments week of Feb. 20th



# Training Update

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- **Super Users/At-the-Elbow**

- Enrolled in 'Employee as Self' and Manager Workday & Tecsys training
- Enrollments for additional Workday security roles this week

- **End Users**

- Week of 2/13: Employee as Self, Manager, Tecsys (all)
- Week of 2/20: Additional WD security roles

- **Completions**

- Training will be required for roles with approval responsibilities
- Dashboard for Workday and Tecsys course completions
- Other LMS reports available upon request



# Training Assignments: Workday Security Roles

Workday Role	Description
<b>Employee as Self</b>	All employees have an inherent role of Employee as Self
<b>Manager</b>	Manager in Workday is someone in a Supervisory Org. With people reporting to them. Managers in Workday have specific responsibilities through workflow.
<b>Cost Center Manager</b>	An assigned role in Workday which has specific responsibilities through workflow to approve financial, supply chain, and HR transactions.
<b>Grant Manager</b>	An assigned role in Workday which has specific responsibilities through workflow to approve financial, supply chain, and HR transactions which are charged to grant worktags.
<b>Financial Analyst</b>	An assigned role that allows view access to various functions.
<b>Department Accountant</b>	An assigned role that allows initiation and view access to various functions.
<b>VUMC Receiver</b>	An assigned role that allows the user to mark goods and services as Received within Workday.
<b>Gift Roles</b>	Various roles that allow access to either view, initiate, or approve workflows which contain a gift worktag.





# Workday Security Roles

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## Manager Role

- Based on Supervisory Organization
- Anyone with direct reports has the Manager role in Workday

## Other Role Assignments

- Currently a collaborative work-in-progress with project team and departmental leadership
- Training will be assigned as applicable
- Training is available for self-enrollment after Feb. 20<sup>th</sup>
- Post go-live, a manager-approved Pegasus ticket will be required to request changes to assigned roles



# Training Assignments: Tecsys Training Curricula

Curriculum/ Audience	Description
<b>Inpatient</b>	All hospital staff working in an inpatient area who access supplies from supply closets and the current POU system.
<b>CDUI (OR/Procedural)</b>	OR & Procedural Clinicians (includes Surgery Centers GI/Endo, Cath Lab, Interventional Radiology (IR), OR TAs, OR Billing Auditors, CSOR)
<b>Case Cart Operations</b>	includes SPD/CSP, CSOR, Surgery Centers
<b>Supply Chain Team</b>	includes Materials Management staff and Receiving staff
<b>Central Supply and Consolidated Service Center</b>	Central office training for staff at Central Supply and the Consolidated Service Center.
<b>Materials Management Auditors</b>	Course enrollment for materials management auditors in support of external clinics using tissue tracking.



# Super User/At-the-Elbow Update

# Workday Super User Update

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## By the numbers:

- 20,082 Workday courses completed
- 886 'Introduction to Workday' completions
- 557 Individuals have accessed the practice environment

## What we need from you:

- Engage your Super Users
- Ask them to complete training & practice in the system
- Look for assigned security role training rolling out this week
- Discuss if they feel prepared to provide your team first-line support after go-live



# Tecsys Super User/ATE Training as of 2/6

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	In Progress	Complete	Not Started
<b>Tecsys Cases Cart</b>	6	12	0
<b>Tecsys CDUI</b>	241	147	4
<b>Tecsys Inpatient</b>	48	48	101
<b>Tecsys MM</b>	7	23	3
	302	432	108

## Responsibilities:

- Complete all training assigned
- Access the Tecsys training environment over the next several weeks
- Complete the case study in training environment to ensure readiness
- Support your area at Tecsys go-live

# Workday Super Users/At-the-Elbow Support

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- Tecsys Super Users who have been involved with testing and Day-in-the-Life will be At-the-Elbow support for go-live
- Additional VUMC staff are needed for At-the-Elbow support for the Tecsys go-live
- View sign-ups at <https://www.vumc.org/pou/training> and email [BusinessEducation@vumc.org](mailto:BusinessEducation@vumc.org) to add additional names
- Access to training and scenario-based case studies in the practice environment will be provided to ensure readiness beginning the week of 2/13



# Leader-led Actions

## todo

### Leader-led Actions February 7th

- ❑ **Share** the February 7th *Change Network Department Presentation* with your team.
- ❑ **Look ahead on the cutover plan. Make any known org changes or purchases asap to avoid freeze periods** [Cutover Plan!](#)
- ❑ **Continue to reach out to your Super Users** to ensure alignment and support for your team(s).
- ❑ **Watch for training** to be released the week of 2/13.
- ❑ **Complete** outstanding Leader-led Actions:
  - **PO cleanup Continues:** Clean up purchase orders (POs) by closing older, inactive POs now to prepare for the transition to Workday. [PO Reference Guide.](#)
  - **Keep current** on EDCs.
  - **Resolve aged non-Epic AR** by working with the appropriate finance support team for your area.

## recap

### February 7<sup>th</sup> Change Network

- **Cutover Activities:** Details of the process and opportunities to communicate key activities were
- **Department Reporting** was reviewed and a step-by-step demonstration was provided.
- **Change Impacts** were shared and a report was provided.
- **Training Update:** An overview of Tecsyes security roles was provided and training was also highlighted.
- **Workday & Tecsyes Access Points** including examples and key dates
- **Super Users:** The Super User training security roles have been assigned and access to the practice environment
- **Tecsyes Update:** Tecsyes Super User data was shared and the need to complete training was emphasized.

Meeting Materials Can Be Found on MyWorkday Change Network [Webpage](#)

- February 7th Meeting Recording
- Change Network Department Presentation
- Previous Leader-led Actions

Send questions to: [myworkday@vumc.org](mailto:myworkday@vumc.org)

For more information visit [vumc.org](http://vumc.org)

todo





Questions?

**Thank You**