Change Network Meeting: February 7, 2023

Change Network Agenda

February 7, 2023

- 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
Accounting Adjustment	Journal Entry	Journal entry in Workday to adjust entries between worktags or transactions created by workflows within Workday.	
Manual Journal Entry	Journal Entry	Adjustments to entries created by systems integrating with Workday	Offline form sent to central office for Workday entry.
Payroll Costing Allocation	EDC (electronic distribution change)	Used in Workday to adjust salary distribution amounts/percentages for the current and/or future fiscal periods.	
Payroll Accounting Adjustment	RDC (retroactive distribution change)	Used in Workday to adjust salary distribution amounts/percentages for closed fiscal periods.	
Supplier Invoice Request (SIR)	Check Request	Used for payment of Non-Purchase Order goods and services	
Miscellaneous Payment (MP)	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

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	Payroll
• 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	• 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

CHANGE IMPACT ANALYSIS
WORKDAY AND TECSYS IMPLEMENTATION IMPACT TO END USERS

Prepared by the Change Management & Training Team

CONTENTS

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

Some of what is <u>not</u> 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
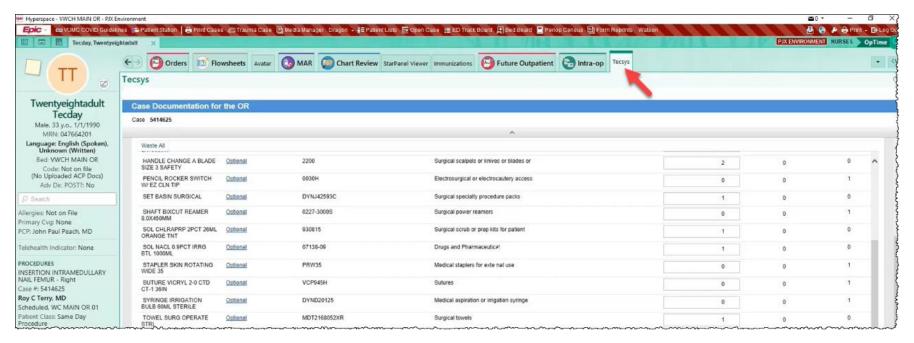- Kronos training will be available later this month for timekeepers and non-exempt staff

Workday Access Points: How will I log in?

Tecsys Access within eStar

➢ Tecsys will be accessible directly from within eStar

Workday & Tecsys Desktop Icons & Network Access

➢ 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 <u>February 13</u>

➢ Users must be on a VUMC network or connected through VPN (BIG-IP Edge Client) to access full system functionality

Workday Access Points

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

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

Workday Mobile App is
not recommended for go-live.

Workday Demo: Workday Help

Workday Help for HR Questions & Issues

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

Training Update

Kronos Training

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

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

Workday Security Roles

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. 20th
- Post go-live, a manager-approved Pegasus ticket will be required to request changes to assigned roles

myworkday

Training Assignments: Tecsys Training Curricula

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

Super User/At-the-Elbow Update

Workday Super User Update

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

myworkday

Tecsys Super User/ATE Training as of 2/6

	In Progress	Complete	Not Started
Tecsys Cases Cart	6	12	0
Tecsys CDUI	241	147	4
Tecsys Inpatient	48	48	101
Tecsys MM	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

- 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 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

recap

February 7th Change Network

- **Cutover Activities:** Details of the process and opportunities to communicate key activities were

- **Department Reporting** was review step-by-step demonstration was

- **Change Impacts** were shared and report was provided.

- **Training Update:** An overview of Tecsys security roles was provided training was also highlighted.

- **Workday & Tecsys Access Points** including examples and key dates

- **Super Users:** The Super User train security roles have been assigned access to the practice environme

- **Tecsys Update:** Tecsys Super User data was shared and the need to training was emphasized.

Meeting Materials Can Be Found on MyWorkday Change Network Webp

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

Send questions to: myworkday@vu

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.

Questions?

Thank You