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VANDERBILT UNIVERSITY
MEDICAL CENTER

myworkday

Change Network Meeting: February 22, 2023
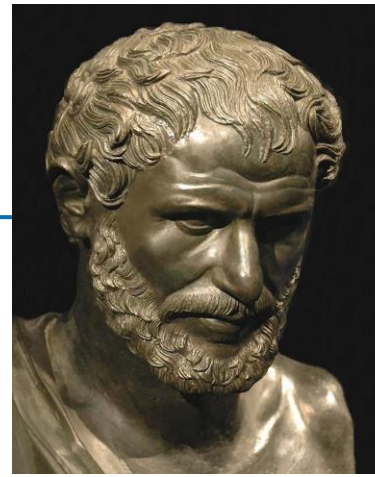
Change Network Agenda

February 22, 2023

- Cutover
- MyWorkday Readiness Resources
- Security Roles
- Items of Interest: Supply Chain
- Tecsys: Call to Action
- Training Update
- Next Steps

Thoughts on Change

'There is nothing permanent except change.'
– Heraclitus

'Change is a normal part of our lives, but it's uncomfortable for the vast majority of people because it makes them feel like they've lost control.... In every way you can, let them know that you can relate to that.'
- Mary Jo Asmus

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Cutover

Cutover Connection

New Activities & Key Dates
- New activities highlighted in orange
- Key dates: 3/17 Last day to make any changes in ePac related to individuals in recruitment process

MyWorkday Readiness Resources

MyWorkday Readiness Resources

Where to find the information you need

1. Everyone can see the **MyWorkday website** for:
   • Cutover/freeze dates & details
   • Training information & guides
   • Archived videos, slide decks, leader-led actions and Q&A for all Change Network & Super User Meetings
   • Change impacts
   • Printable flyers
   • Other tools & resources (e.g., Cost Center Translator)

2. Areas moving to Tecsys, see the **Tecsys website** for:
   • Implementation information
   • Training information & guides
   • At-the-Elbow Support information

3. Workday Super Users, access and search the **Workday Super User Support** channel in Teams.

4. If your question has not been answered by searching the resources above, **email** the project team at myworkday@vumc.org.

5. Continue attending these **Change Network meetings** and sign up for **Readiness Sessions** in the Learning Exchange for more information by role.

MW

Workday Security Roles

Workday Roles

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

Other Security Role Assignments
- Currently a collaborative work-in-progress with pro[ject] team and departmental leadership
- Training will be assigned as applicable
- All training is available for self-enrollment this week
- Post go-live, a manager-approved Pegasus ticket will be required to request changes to assigned roles

My Org Chart

Claudia Fontaine (007510?)
Senior Director
2525 WEST END AVE (...

Amanda Reece (0097034)
Manager Learning
2525 WEST END AVE (...

Brandon Whitworth (0142?)
Asst Director
2525 WEST END AVE (...

Diana Ormsby (0101069)
Director
2525 WEST END AVE (...

Jeffery Hileman (0071298)
Manager
2525 WEST END AVE (...

Kathleen Mandato (00613...
Dir Clinical Educ & Perf ...
2525 WEST END AVE (...

Thomas Pate (0172616)
Manager Learning
2525 WEST END AVE (...

Crystal Morey (0174799)
Assoc Program Manager
2525 WEST END AVE (...

Julianne Slick (0184807)
Asst Director
2525 WEST END AVE (...

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Cost Center Manager

The primary Administrator responsible for the financial performance of a department or division. Responsible for budgeting, variance analysis, revenue, purchasing, and personnel.

SCM Approvals

- Purchase Requisitions
- Change Order
- Expense Reports
- Miscellaneous Payments
- Supplier Invoice
- Stipend Contract Events

HCM Approvals

- Position Restriction Costing Allocations
- Payroll Accounting Adjustments

Accounting Approvals

- Accounting Adjustments
- Manual JE's

Grants Manager

The primary Administrator responsible for the Grant Administration of a department or division. Responsible for budgeting, variance analysis, purchasing, and sponsor reporting.

SCM Approvals

- Purchase Requisitions
- Purchase Order
- Change Order
- Expense Reports
- Misc Payments
- Supplier Invoice

HCM Approvals

- Effort Certification
- Payroll Accounting Adjustments

Accounting Approvals

- Accounting Adjustments
- Manual JE's

Accounting Submissions

- Grant Budgets
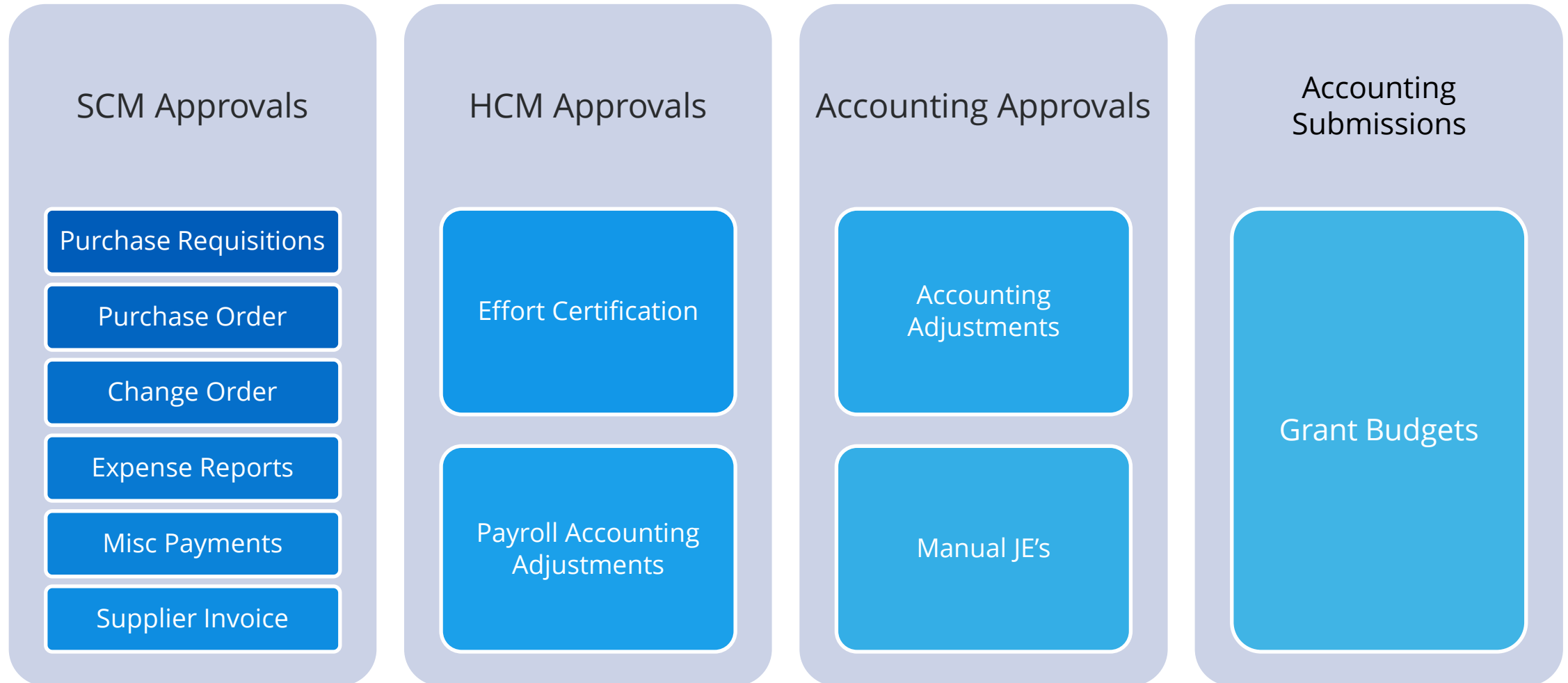
Gift Manager

The primary Administrator responsible for the Gift Administration of a department or division. Responsible for budgeting, variance analysis, purchasing, and sponsor reporting.

SCM Approvals

Purchase Requisitions

Expense Reports

Misc Payments

Accounting Approvals

Accounting Adjustments

Department Accountant Level 1

The departmental role that allows for initiation of Accounting Adjustments (operational journals not related to payroll).

Accounting Initiations

Accounting Adjustments
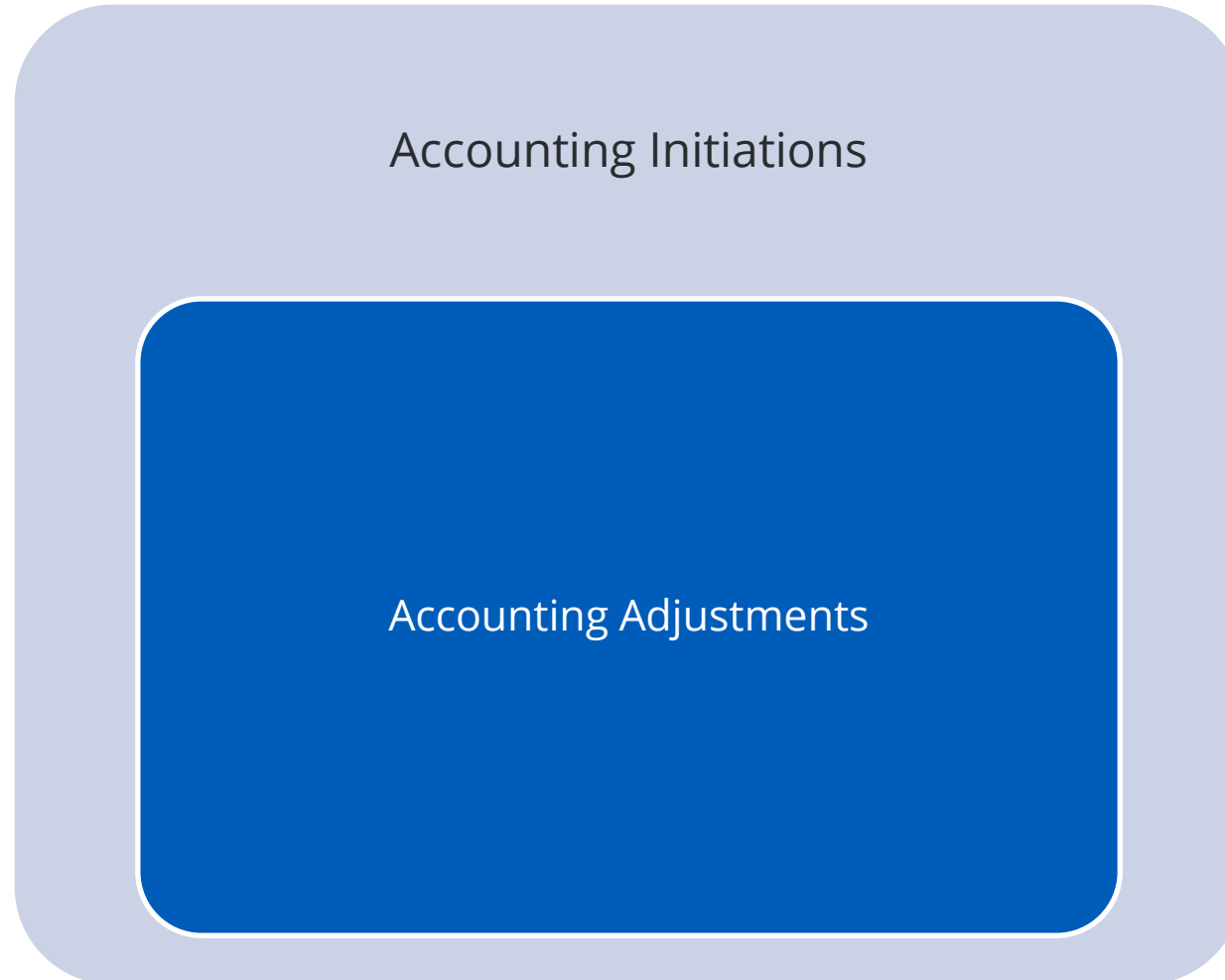
Analyst Roles

The departmental roles that allow for viewing of financial data and reports for a specific worktag type and worktag values. These roles do not allow for viewing of detailed payroll information, only summarized.

Cost Center Financial Analyst

Gift Financial Analyst

Grant Financial Analyst

Project Financial Analyst
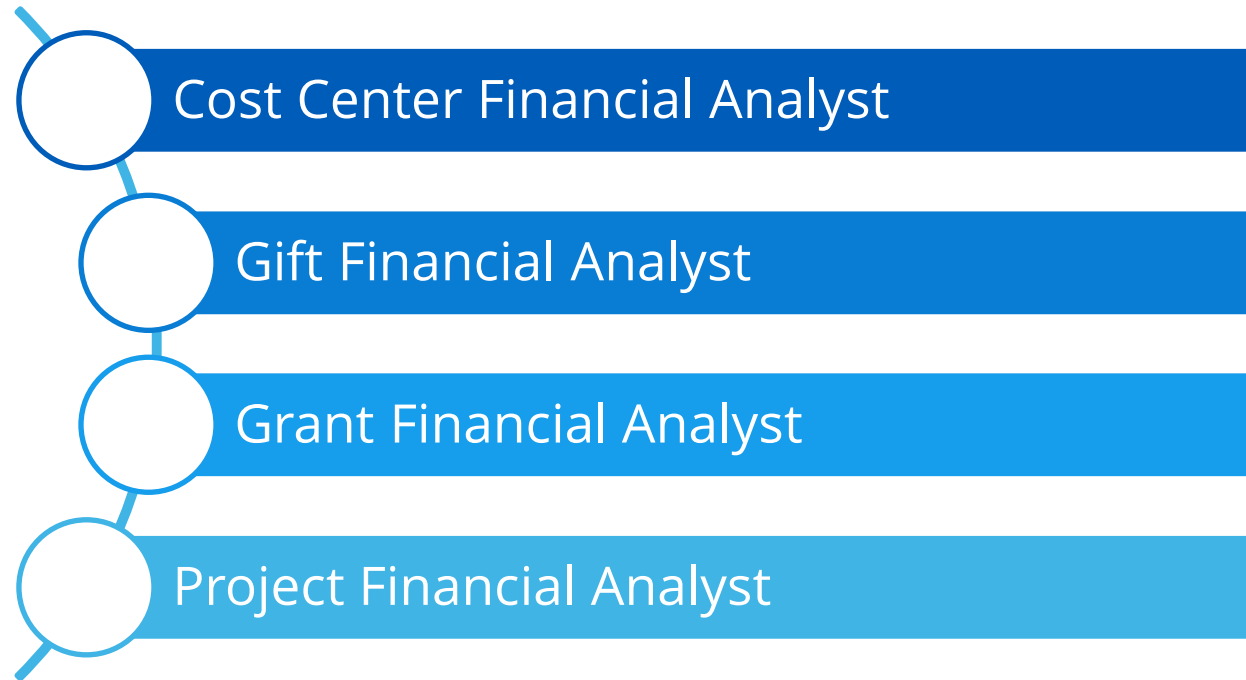
Decision: Signature Authority

- Inventory replenishment related requisitions (such as perpetual with min/max, periodic) or medical supply requisitions/templates where items are purchased utilizing the item master (i.e., purchases for clinics, etc.) will not require approval

- All other requisition types (regardless of dollar amount), will go through the defined approval process

- Workday system controls ensure Segregation of Duties; initiators cannot approve their own transactions

- Approval levels based on best practice as compared to other academic medical centers of our size

Signature Authority - Requisition/Direct PO Approvals

Workday requisitions (including punchout, special requests, purchased services, consignment) should follow the sequential approval framework based on the cost center of the requester and total dollar value.

Level	Adult/Children's Hospital (Group 1)				Regional Hospital (Group 2)			
	Current Approval Levels		Approval Levels		Current Approval Levels		Approval Levels	
	Above ($)	Limit ($)*	Above ($)	Limit ($)	Above ($)	Limit ($)	Above ($)	Limit ($)
Administrative (non-management)	$0	$1k	N/A		$0	$1k	N/A	
Managers	$1k	$10k	$0	$10k	$1k	$10k	$0	$10k
Directors	$10k	$25k	$10k	$50k	$10k	$25k	$10k	$25k
Administrator	$25k	$50k	$50k	$150k	$25k	$50k	$25k	$50k
Leader	$50k	$100k	$150k	$500k	$50k	$100k	N/A	
Hospital President	$100k	$500k	$500k	$1M	$100k	$250k	$50k	$250k
System CFO, COO, Deputy CEO	> $500k		$1M	No upper limit	>$250k		$250k	No upper limit

Signature Authority - Requisition/Direct PO Approvals - continued

Workday requisitions (including punchout, special requests, purchased services, consignment) should follow the sequential approval framework based on the cost center of the requester and total dollar value.

Level	*Other Operating Divisions (Group 3)				Davidson County, Regional Clinics, VHS affiliates (Group 2)			
	Current Approval Levels		Approval Levels		Current Approval Levels		Approval Levels	
	Above ($)	Limit ($)*	Above ($)	Limit ($)	Above ($)	Limit ($)	Above ($)	Limit ($)
Administrative (non-management)	$0	$1k	N/A		$0	$1k	N/A	
Managers	$1k	$10k	$0	$10k	$1k	$10k	$0	$10k
Directors	$10k	$25k	$10k	$50k	$10k	$25k	$10k	$25k
Administrator	$25k	$50k	$50k	$150k	$25k	$50k	$25k	$50k
Leader	$50k	$100k	$150k	$500k	$50k	$100k	N/A	
Hospital President					$100k	$250k	$50k	$250k
System CFO, COO, Deputy CEO	> $500k		> $500k	No upper limit	>$250k		$250k	No upper limit

*Other operating divisions include all other divisions such as Medical Center Administration, etc.

Signature Authority – Operating Entities Group 1

Operating Entity Worktag ID	Workday Description	Signature Authority Type	Group
OEMCJCHV	Monroe Carell Jr Children's Hospital at Vanderbilt	Adult/Children's Hospital	Group 1
OEVRSM_Adult	Retail, Specialty & MCP Pharmacy - Adult	Adult/Children's Hospital	Group 1
OEVRSM_Child	Retail, Specialty & MCP Pharmacy - Children's	Adult/Children's Hospital	Group 1
OEVHPG	Vanderbilt Health Pharmacy Group	Adult/Children's Hospital	Group 1
OEVHRXS	Vanderbilt Health Rx Solutions	Adult/Children's Hospital	Group 1
OEVUH	Vanderbilt University Adult Hospital	Adult/Children's Hospital	Group 1

Items of Interest: Supply Chain

PCard and T&E Cards

- All card transactions will be reconciled within Workday (rather than US Bank or Concur)

- Cardholder's Workday Manager will approve transactions

- Training will be required for cardholders and their Managers

- PCards will be an allowable purchase method for Grants because Grant transactions will also require Grant Manager approval

Purchase Orders

- Receipts must be documented in Workday for all goods and services by a VUMC Receiver (central or non-central)
- PO's over $25k will require a PEER contract number
- No returns under $50 unless the purchase was grant-funded or if the return is part of a recall
- Workday will provide real-time match-exception reporting
- New Supplier requests will require Manager approval
- Shipping locations

Expense Reports

- After April 1 expense reports will be submitted within Workday
  - Concur will not be retired, but will remain VUMC's business travel booking application
  - Concur travel will not interface with Workday
  - Travel booked within Concur will be added manually to Workday to expense reports (unless travel is booked using a T&E card)
- Managers may take one of the following actions when approving expense reports in Workday:
  - Approve
  - Approve and send for further approval
  - Return to the employee
  - Deny (closes the report)

Download this flyer [HERE](#) or [HERE](#)

Workday System Demo

Tecsys

Inpatient Areas:
- Tecsys will be used when scanning chargeable items
- Chargeable items will have green scanner labels

Procedural Areas and ORs
- Will use Clinical Documentation User Interface (CDUI) via the Tecsys tab within eStar

Tecsys will also be used by Central Supply:
- Case Cart
- Materials Management teams

Tecsys: At-the-Elbow Support - Call to Action

What we need from you:

- Reminder: It's a Saturday go-live **(April 1)!**

- Engage <u>Vanderbilt</u> Tecsys Super Users/At the Elbow Support:

  - Plan ahead

  - Identify how your team will work with ATE/Super Users

  - Ensure Super Users are prepared for go-live

  - Encourage Super Users to complete training

Tecsys Super Users/At-the-Elbow Support

- Additional VUMC staff are needed for ATE/Super User support for the Tecsys go-live

- View sign-ups at https://www.vumc.org/pou/training

- To add additional ATE/Super Users email BusinessEducation@vumc.org

Training Update

Training Update

- [Dashboard](#) - Available to Managers
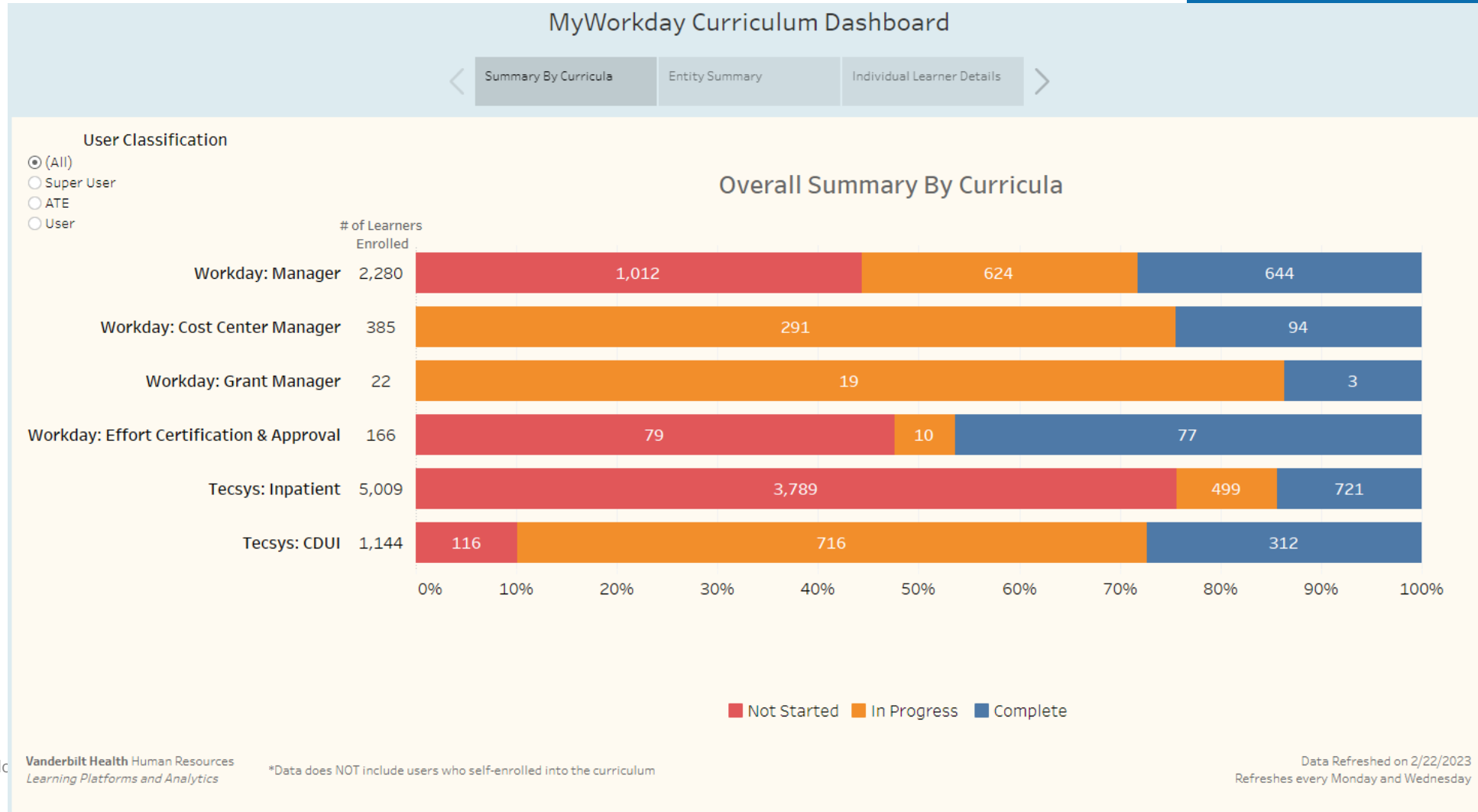
MyWorkday Curriculum Dashboard

Summary By Curricula | Entity Summary | Individual Learner Details

Curricula Name
- ◉ (All)
- ○ Workday: Manager
- ○ Workday: Cost Center Manager
- ○ Workday: Grant Manager
- ○ Workday: Effort Certification & Approval
- ○ Tecsys: Inpatient
- ○ Tecsys: CDUI

User Classification
(All) ▼

Status
(All) ▼

Learner Progress by Entity

Entity	# of Learners Enrolled	Not Started	In Progress	Complete
Academic Enterprise	812	314	237	261
Adult Hospital	4,058	2,465	1,022	571
Bedford County	196	99	36	61
Clinical Enterprise Office	33	20	11	2
Executive Nursing	83	35	27	21
Finance	261	119	72	70
Human Resources	64	17	28	19
Human Resources-Temp..	1	1		
Legal Affairs	17	9	7	1
MCJCHV	1,684	1,134	251	299
Med Center Admin	165	73	46	46
Office of CEO	97	46	27	24
Population Health	47	21	10	16
Tullahoma-Harton	275	117	60	98
VHS	17	4	2	11
VIP	35	9	8	18
VMG-TVC	421	127	174	120
VPH	45	25	12	8
VUMC Development	35	23	7	5
VUMC IT	106	17	41	48
Wilson County Hospital	554	321	81	152

■ Not Started ■ In Progress ■ Complete

Vanderbilt Health Human Resources
Learning Platforms and Analytics

*Data does NOT include users who self-enrolled into the curriculum

Data Refreshed on 2/22/2023
Refreshes every Monday and Wednesday

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MyWorkday Curriculum Dashboard

Curricula Name
- ⦿ (All)
- ○ Workday: Manager
- ○ Workday: Cost Center Manager
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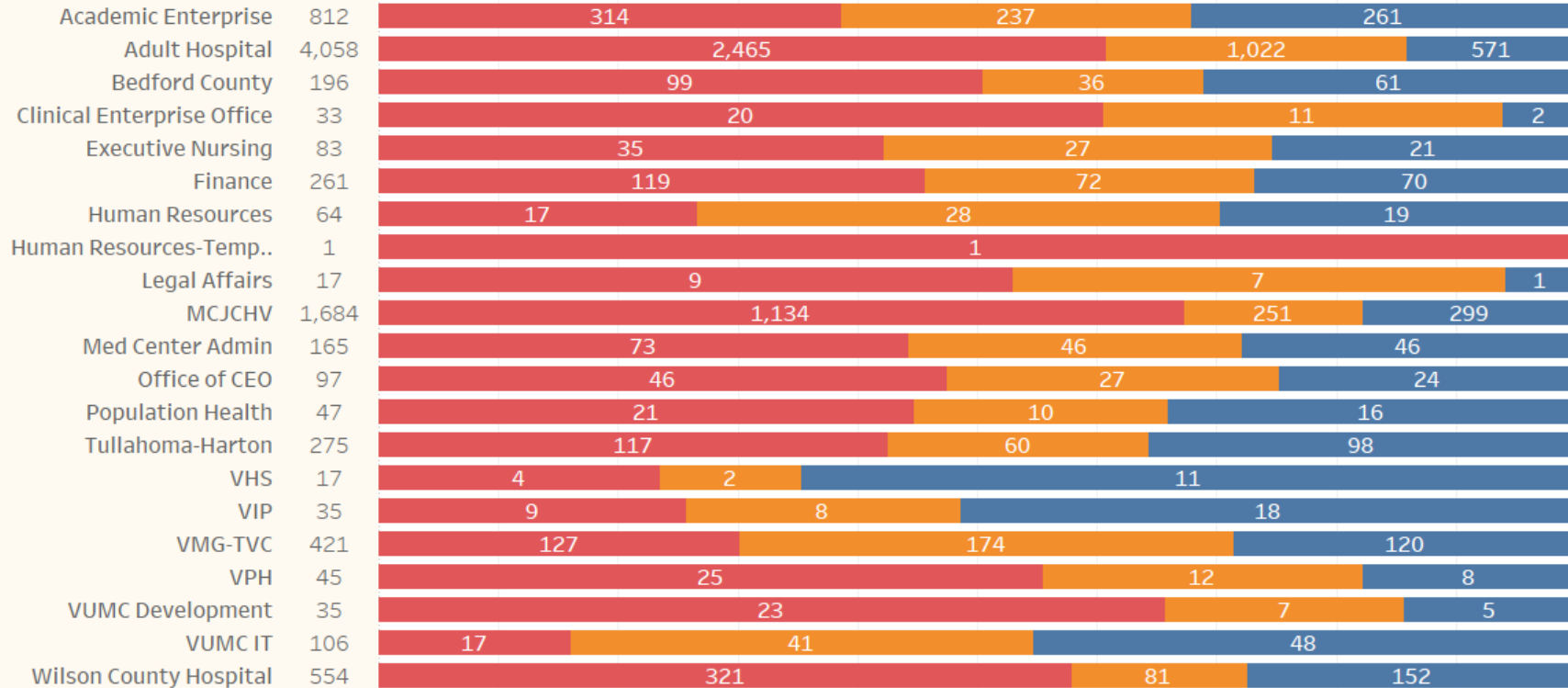- ○ Tecsys: Inpatient
- ○ Tecsys: CDUI

■ Not Started ■ In Progress ■ Complete

Not Started	In Progress	Complete
4,996	2,159	1,851

Learner Progress Across All Curriculum: 9,006 Enrollments

Status
(All) ▾

User Classification
(All) ▾

Entity
(All) ▾

Organization
(All) ▾

Hd Dept Manager Name
(All) ▾

Name (VUMC ID)
[   ]

Name (VUMC ID)	User Classification	Job Code Descr	Dept Descr	Organization	Entity	Status	
Abatto,Megan (abattom)	User	Nurse Resident Inpatient	STAM Cohort 50	MCJCHV Nursing	MCJCHV	Complete	■
Abay,Roman H (abayrh)	User	Perioperative Support Tech	Main OR Tech Support 10	Perioperative Service	Adult Hospital	In Progress	■
Abbey,Kaitlin M (abbeykm)	User	Reg Nurse 2 CC Inpatient	Nursing ROCU	VUH Professional Services	Adult Hospital	In Progress	■
Abbott,Christopher Leon (abbottcl)	User	Vice President Supply Chain	SC Leadership (Supply Chain)	VUH SC (Supply Chain)	Finance	Not Started	■
Abbott,Kimberly (abbottk)	User	Nurse Assistant	Med/Surg	Wilson County Nursing	Wilson County Hospital	Not Started	■
Abbu,Stephanie N (abbus)	ATE	Mgr Patient Care Services Inpt	Neonatal Services	MCJCHV Nursing	MCJCHV	Complete	■
Abbuhl,Mary F (abbuhlmf)	Super User	Director	Director's Administration	VUH Professional Services	Adult Hospital	Complete	■
Abdelmalak,Samah Sobhy (abdelmss)	User	Care Partner	Hematology Oncology Unit 50	VUH Nursing	Adult Hospital	Not Started	■
Abdelmaseh,Jozeph N (abdelmjn)	User	Nurse Asst PRN	1 West	Wilson County Nursing	Wilson County Hospital	Not Started	■
Abdi,Naziin Ahmed (abdina)	User	Response Care Partner PCT PRN	Transplant/ General Surgery ..	VUH Nursing	Adult Hospital	Not Started	■
Abdulahad,Zeena (abdulaz)	User	EVP & Chief Development Ofcr	VUMC Executive Office	VUMC Executive Office	Office of CEO	Not Started	■

Vanderbilt Health Human Resources
Learning Platforms and Analytics

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MyWorkday Outreach

Next Month

- MyWorkday swag will be available for DRLs to pick up in March

- The MyWorkday team will soon visit the plaza and regional locations. Watch your email for dates and times near you (more to come).

Next Steps

todo

Leader-led Actions February 22nd

☐ **Share the February 22nd *Change Network Department Presentation*** with your team and continue the conversation about the project change impacts and how they will affect the work of your team.

☐ **Look ahead on the cutover plan. Communicate how these activities impact your team.** 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).

☐ **Complete your training** and encourage your team(s) to do the same.

☐ **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.

VANDERBILT UNIVERSITY MEDICAL

recap

February 22nd Change Netw...

- **Cutover Activities:** Cutover deta... need to communicate activities ... New activities are highlighted in...

- **MyWorkday Readiness Resourc...** highlighted including the MyWo... Tecsys websites as well as the W... Support channel in Teams, the M... inbox and the process to sign up... Network readiness sessions.

- **Workday Security Roles:** Securit... signature levels were reviewed.

- **Supply Chain:** Key updates on P... Cards, POs, and expense reports...

- **Training Update:** Both expense ... the Training dashboard were de...

- **Tecsys Update:** Key Tecsys functi... reviewed. Tecsys ATE/Super Use... to complete training, plan ahea... for go-live.

- **MyWorkday Outreach:** MyWork... be available for DRLs to pick up i...

Meeting Materials Can Be Found ...
MyWorkday Change Network [Web...](#)

- February 22nd Meeting Recordin...
- Change Network Department Pr...
- Previous Leader-led Actions

Send questions to: [myworkday@vu...](#)

For more information visit [vumc.o...p/MyWorkday](#)

Thank you!