

CHANGE IMPACT ANALYSIS

WORKDAY AND TECSYS IMPLEMENTATION IMPACT TO END USERS

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INTRODUCTION

Change impact analysis summarizes key changes in workflows and business processes to help determine gaps between current and future states for end users. The Change Management and Training team has prepared this analysis to inform all Workday and Tecsys end users about upcoming changes that may result in the need for changes to existing workflows. Changes that impact central office staff only (HR, Finance, Supply Chain) are *not included* in this document.

This document will not provide detailed process information, but rather provides a general overview of what will change with Workday/Tecsys. Please refer to specific process training modules and guides for more details.

PROCESS OVERVIEW

The change impacts noted below were captured in technical configuration sessions and knowledge transfer sessions by various members of the project workstreams. Change impacts have been reviewed by workstream leads and their delegates, as well as the Change Management and Training team.

Changes to this analysis are anticipated based on outstanding system configuration and process decisions.

IMPACTS BY FUNCTIONAL AREA/WORKSTREAM

The tables below summarize the change impact analysis findings by project workstream and topic. Impact analysis includes measuring degree of impact for each change.

Degree of impact was measured using the following scale:

Impact Level	Criteria
High	<ul style="list-style-type: none">● Major changes to roles and responsibilities● Shifting work processes to comply with new regulations● New processes must be defined● Significant increase or decrease in work● Shift from manual work to automation● Operating on two separate machines or environments● Moving to secure environments, either physical or virtual● High level of technical or functional training required significant shifts in accountability (loss of autonomy, responsibility, decision making, possible org structure changes)
Medium	<ul style="list-style-type: none">● Minor changes to roles and responsibilities● Move to more consistent processes● Some increase or decrease in work● More work will be completed within the new/updated system● Leveraging access points, such as two-factor authentication● Moderate level of technical or functional training● Moderate shifts in accountability or reporting
Low	<ul style="list-style-type: none">● Few or no changes to roles and responsibilities● Processes will need to be documented● Little increase or decrease in work● The system will replace legacy system● Changes to look and feel of forms or systems● Light level of technical or functional training needed● Small shifts in accountability or reporting

Key changes include those that are high impact for many or most employees (i.e., that represent significant changes from current to future state), or those changes that have the potential to disrupt existing workflows and cause employee resistance to change.

Recommendations for each project workstream and topic follow the summaries below.

HUMAN RESOURCES

KEY CHANGES & IMPACTS BY TOPIC

Topic	Key Changes	Impact
Absences	All employees not using Vandyworks will follow a standard workflow in Workday to request time off.	Red
	Managers will have access to real-time leave status information, which minimizes amount of time managers spend checking with HR.	Red
	FMLA, TMLA requests will be processed via the case management tool in Workday. Absence partners and managers will receive various notifications related to absence requests.	Yellow
	If planned return-to-work date is entered in Workday, returning to work process after a leave of absence is more automated.	Red
	New hire allotments will be pro-rated based on hire date.	Red
	Time off balance updates due to job changes will be updated at least within the month in which the job change occurs (possibly on a weekly basis, exact SOP TBD). There will be a calculator created that will reduce the amount of human error.	Red
	Disability leave processing will be more automated and require less manual interaction between HR, employees, and managers.	Red
Benefits	Benefits functions currently conducted in Benefit Express portal will move to Workday; no separate login is required. Options to enroll using Workday's mobile app will also be available.	Yellow
	Some benefits will be pro-rated based on hire date.	Red
	Short-term disability no longer has 1 year waiting period; new hires are eligible 1 st of month following 30 days from hire.	Red
	Employees will be able to see retirement plan enrollments from the Workday benefits tab; no separate login with Fidelity is required.	Red
	Employees will see Go-for-the-Gold status from the benefits tab in Workday; no separate login is required.	Yellow
	Employees will be paying for benefit coverage for the pay period they are being paid for. This makes it easier for employees to understand and calculate their benefits.	Red
Case Management	Workday's Case Management solution ("Workday Help") will allow HR and employees to track and manage HR cases in a single, standard system. Employees may call the Employee Service Center or enter a new case, depending on preference.	Red
Compensation	Workday will allow more integration of compensation processes into a single system.	Red
	Some compensation processes will require manager and HR approval steps within Workday.	Yellow
Contingent Workers	Managers will oversee contingent worker profiles in Workday (no longer a central HR process).	Yellow
	VUMC ID will be issued to contingent workers after they are added to Workday; Pegasus ticket process no longer applies.	Yellow

Creating & Maintaining Positions	Several processes currently initiated by central HR teams (e.g., creating new positions) will be initiated by managers in Workday and approved by HR.	Yellow
	There will be some terminology changes to certain job fields and actions.	Green
	The process to create new job codes will be standardized, streamlined among various business partners, and managed in Workday.	Red
Employee Data	Employee data changes (personal or work info) will be entered in a single, centralized system. PeopleFinder will no longer be used.	Red
	Employees will have more self-service options to maintain their own data.	Red
	Access to business systems will be automated based on employee roles, rather than manually managed through Privilege Management.	Red
	Delegation capabilities will be enabled in Workday to support coverage when responsible managers are out of the office. Delegation is designed to be a temporary process.	Red
	Many job-related changes will be processed in Workday, utilizing approval workflows in various stages.	Red
Job Changes	Managers will be required to follow the standard job change process.	Red
	Both the current and receiving manager can initiate a job change. Job changes can be initiated across the organization; not restricted to within a department.	Yellow
	Privilege Management will not drive workflows within Workday. Initiating job changes will be a manager function within Workday.	Yellow
Kronos	Exempt staff will no longer use Kronos; time off will be requested in Workday.	Red
	Non-exempt staff who use Kronos will only use timestamp or badge swiping to track time in/time out/meal breaks. Time Entry and automatic meal deductions will be eliminated.	Red
	Employee time may be charged to a grant, project, or gift by use of a worktag. Cost center is the default for all employees whose time is not charged to a grant, project, or gift.	Yellow
	Cost allocations will NOT be done in Kronos but will pass a "default" center which will allow Workday to use the cost allocations per Position. If an actual Worktag is passed to Workday, the hours will not be allocated but assigned directly to that center.	Yellow
	New requests/changes to closed pay periods can only be done by Timekeepers in Kronos for time periods starting March 26, 2023.	Red
	Kronos no longer allows float with overtime.	Red
	Overtime will be recorded based on the position worked when the employee crosses 40 hours. No weighted average of salary for overtime needed in Workday.	Yellow
	The new Labor Level of Position will drive the pay in Workday. Data such as company, pay group, center will not be needed on the Payroll file. For staff who hold multiple positions or who are paid by multiple cost centers.	Yellow
Labor Relations	HR cases may be entered into and managed through a new case management system within Workday. Email and other external systems will no longer be the documentation of record.	Red
	Performance plan terminology changes from "Performance Accountability and Commitment (PAC)" to "Performance Improvement Plan (PIP)."	Green
Offboarding	Individuals that voluntarily terminate will receive a Workday To-Do task to complete an exit survey. The task will contain a link to complete a survey in Redcap.	Green
	Termination date will now mean the last day of work, not the day when non-employment begins.	Yellow
	Termination process may be initiated in Workday by the employee or manager.	Green

Onboarding	Some onboarding processes and data collection will be automated within Workday.	
	Terminology changes from “orientation period” to “probationary period.”	
	All pre-employment background checks will be submitted to Sterling through Workday as part of the hire process. This will now apply to some non-staff categories who had different processes before Workday. The individual will start the background via emails sent to them by Sterling.	
Payroll	Workday will be the primary self-service tool for viewing HR and pay data, replacing C2HR.	
	Workday will integrate with Payroll system, allowing real-time data updates.	
	New cost allocation process replaces earnings distribution change (EDC) and retroactive distribution change (RDC) processes in ePAC.	
	Payroll Costing Allocations (Workday terminology for EDCs) are assigned at the position level. When an employee leaves a position the costing allocation is retained and will already be assigned when the replacement incumbent is hired. No action will be required by the department on the costing allocation with employee transitions unless the funding source(s) need to change.	
	An employee's manager can initiate a Payroll Costing Allocation event for an employee when an allocation change is required. Additionally, a new role, called the Payroll Costing Initiator, can be assigned to function like the current day PA Initiator role for EDCs and RDCs when the payroll costing process is managed by a departmental administrative team member (other than the manager). Initiators may be assigned to their departments' cost center(s) where this role is required to support central departmental management of payroll costing. A home cost center will be assigned to each worker's position which will enable the Payroll Costing Initiator to take actions on faculty and staff within their department.	
	Payroll Accounting Adjustments (Workday terminology for RDCs) will be adjusted based upon dollar changes.	
	Service Free Stipends for active employees will be paid through payroll. Service Free Stipends paid to Contingent Workers will be through Accounts Payable.	
Performance Management	New performance feedback request process is available in Workday and automatically integrated into performance management process.	
	Those with the Workday Manager role (i.e., those employees with direct reports in the organizational structure) will be responsible for the performance management process.	
	90-Day, Stay, and Exit surveys currently administered through RedCap will feed to Workday. Process will be more automated.	
	Annual Evaluation now has seven parts: Elements of Performance, Credo, Compliance, Goals, Accomplishments, Feedback, Development Items, and Supporting Documents. Only Elements of Performance, Credo, Compliance, and Goals are mandatory and impact the overall performance rating. Accomplishments, Feedback, Development Items, and Supporting Documents are not mandatory.	
Recruiting	Applicant interface is user friendly, though not as mobile friendly, in Workday.	
	Current employees can initiate external candidate referrals.	
	Candidate feedback can be digitally documented within Workday.	
	Internal candidates will apply internally within Workday.	
	Background check process will be streamlined and user-friendly for all candidates.	
	Offer acceptance letters will be automated via Workday and electronically signed by candidates.	

	One requisition can fill multiple job positions, with multiple job ID position numbers.	
	Managers' one-up leaders, entity leaders, and Finance CLC will approve requisitions in Workday.	
	Managers will have to enable temporary delegation in order for others to submit job requisitions on their behalf.	
Talent Profile	Employees will be responsible for maintaining their own talent profiles, including certifications, licensures, and education.	
	CATS will no longer be used for tracking clinical competencies, rather this data will be tracked within Workday profile information. An overarching, formal competency model will be built within Workday.	
	Managers can configure performance calibration dashboards for their areas in Workday.	
	Business leaders can view peer goals within Workday.	

RECOMMENDATIONS

- Ensure managers have awareness and process training for their new responsibilities, as well as an understanding of changes in how tasks and responsibilities should be delegated in Workday.
- Ensure all staff understand Kronos changes resulting from Workday.
- Ensure all employees can maintain their own employee profiles, including demographic information, certifications, licensures, and education.

KEY CHANGES & IMPACTS BY TOPIC

Topic	Key Changes	Impact
Capital Projects	Request and approval processes will be standardized through Workday.	
	Driver-based, rolling forecast model in Workday will provide leaders with forward-looking analysis. Long range plan will have 3-4-week cycle time and rolling forecast of 6-8 weeks.	
	No more 'capital accounts' vs 'non-capital accounts'. Trackable spend categories chosen + capitalization policy will drive resulting accounting - whether capital or expense.	
	Legacy 'capital' centers (fund 8) are now project IDs if still in progress or business asset IDs if already capitalized and depreciating. Workday will use a Project ID field rather than generating new cost centers for projects.	
	The entire cost of the capital project should be budgeted and procured using the same project ID for both operating expense items and capital items (no more fund 8 centers for capital portion and mirrored operating center for items that should be expensed as incurred). Reporting will allow users to view the project spend as a whole with the ability to split the expensed items from the capitalizable items.	
	Routine capital allocations by division will receive a single project ID that will remain consistent across fiscal years. This eliminates the legacy routine allocation centers by FY, which eliminates the tracking of spend by year of allocation. We will track spend against total cumulative allocation simplifying the procurement process for end users.	
Capital Planning	All capital for requisition will originate in Workday Capital Planning. A standard set of input fields will be required.	
	Workday Capital Planning is a single source of truth for all capital requests and will store requests until they are deemed ready to advance for requisition by the requesting division.	
	Annual routine allocation budgets will be provided to all VUMC divisions in Workday Capital Planning. Divisions will prioritize projects and assign them to the allocation within the system.	
	Reporting access and capabilities will be available and may differ from current state.	
	All divisions will receive their routine allocations in the Workday Capital Planning system and assign projects against it.	
Capital Purchases	Capital purchases moving forward will be capitalized and depreciated in the funding source the item is procured in. Workday functionality allows us to meet both GAAP and Uniform Guidance requirements without having to capitalize these assets centrally.	
	A single list of 'trackable' spend categories will be utilized for both 'capital' and 'non-capital' items. Capitalization policy will be captured in 'Asset Book Rules' which is used to determine purchases that should be capitalized. End users no longer have to determine whether their purchase requires capitalization.	
	All purchases of laptops and desktops will be capitalized and require a capital requisition.	
Financial Close	Many processes like journal entries, reconciliation, and closing will have automated components within Workday.	

	Standardized closing checklists are used in Workday to enhance governance of closing processes.	
	Close dashboards allow employees to monitor period-end closing activities, including reconciliations.	
	Systematic notification of close progress at defined milestones will be sent to designated groups. For example, Finance Analysts may receive a notification that preliminary month end reports are ready for review.	
Financial Reporting	Current manual and shadow reporting systems and processes will be replaced by Workday reporting functionality.	
	Self-service reporting will be provided for departmental managers within the Workday application environment. Reports will be enhanced with abilities for filtering and drilling within financial data at a summary and transaction level.	
	Reporting access and capabilities may differ from current state based on Workday security role assignment.	
	FY20, FY21, and FY22 general ledger history will be converted at a funding source/GL ledger account level to support historical and trend reporting. FY23 accounting periods will be converted at an accounting transaction level to support a more complete view for the current open fiscal year for departmental managers and analysts. All conversion journals will be tagged as conversion. At go-live, the month of March will be closed in our legacy GL. Conversion on March month end data will begin on April 14th. March data will be validated in Workday on or before April 21st and full conversion history will be available in Workday once complete to support fiscal year to date and prior year reporting.	
Foundational Data Model (FDM)	Cost center and account structure are both changing to a streamlined, standardized system. The new structure will reduce general ledger accounts by 90% to simplify reporting processes, and to align with SCM, HR, and other interfaces.	
	Our current cost center structure will be replaced with 5 key funding source worktag types: cost centers, gifts, grants, programs, and projects (capital).	
	Ledger accounts will be summarized. Spend categories, revenue categories, purchase items, and expense items are dimensions that will provide more detailed information about a financial transaction.	
	Some worktag types will be required on all financial transactions.	
	Worktags will be used to assign some data points/information about a transaction currently included in cost center structure. Worktags can be utilized to simplify some reporting capabilities.	
	Accounting activities and reporting will be standardized and automated when possible, eliminating some of our manual processes.	
	All legal entities with independent tax IDs are set up as a Company in Workday. VUMC's legal ownership structure is used to aggregate companies into company hierarchies with Consolidated Vanderbilt University Medical Center being the top level. Intercompany accounting automatically created by Workday any time transactions cross companies, yielding an increase in this activity compared to current state.	
Financial Transaction Processing	Many non-standard, decentralized transaction processing functions will be centralized and automated in Workday.	
	System controls allow for proper segregation of duties by requiring the initiator to be different than the approver for financial transactions and other business processes that have a financial impact.	
	Workday will offer streamlined intercompany accounting and invoicing capabilities.	
Gift Accounting	Costing allocations are set up in Workday; though they do not expire, delivered functionality will prevent payroll costs to charge a gift that is inactive (fully spent with no anticipated additional contributions). Payroll will charge to	

	the employee's default cost center in these instances until the costing allocations is updated.	
	Gift IDs will be created in Workday directly by the Development team and in limited circumstances the Gift/Endowment Finance team for internal endowments.	
	Because of the worktag system, Workday will pick up the appropriate gift manager to approve gift-related items.	
	Deficits will be cleared by central finance via accounting journal that will not reverse. Departments will be responsible for submitting requests to cover the deficit with additional funding sources as needed.	
	Departmental gifts dashboard will give gift managers/gift analysts access to view their entire portfolio of gifts and the respective remaining balances to spend. Access and results returned will be limited based on security assignments. Reports will be segregated into spendable gifts and endowment gifts.	
	Gift IDs in Workday have a 'Restrictions' tab in which gift managers/gift analysts can view the gift's primary purpose, alternate purpose if applicable, and a summary of the restriction. For gifts created after go-live, a copy of the gift agreement itself will also be attached to the gift ID to increase transparency of the relevant restrictions for departmental users.	
	Allocations in Workday will record endowment distributions based on spending. More real-time metrics of remaining gift balances will be available in Workday.	
Journal Entries	Journal entries will post in real-time, rather than overnight in batches.	
	There are two primary journal types within Workday (operational and accounting). Operational journals are generated through a Workday based business process (e.g., salaries and fringe, procurement-based purchases, etc.) Accounting journals are manual journals interfaced from other source systems and manually entered into the system. The system-based capabilities associated with each type and the process for making corrections vary.	
	Workday uses account posting rules to improve accuracy in journal posting, reduce manual journaling, and minimize journal review. Defined business processes route journals through appropriate review levels. Support for manual journal attached directly in Workday.	
	Manual postings to certain 'Control Accounts' will not be allowed to facilitate auto-reconciliation of high-volume, high-dollar accounts with only operational activity. Examples include cash, AP, depreciation.	

RECOMMENDATIONS

- Decentralized/departmental staff with financial responsibilities will need significant process training.
- Employees will require significant support to adjust to changes to cost center and account structures and begin utilizing worktags.
- Automation of many reporting processes may allow for some employees to change the focus of their work from financial data entry/reconciliation to analysis. Managers of these employees should be prepared to help them transition.
- Some employees may no longer have access to conduct transactions or run reports in Workday, due to its role-based security model. Managers should help employees to adapt to new workflows and/or reassign duties as needed.

RESEARCH & GRANTS

KEY CHANGES & IMPACTS BY TOPIC

Topic	Key Changes	Impact
Award Closeout	Workday award task functionality will replace VUMC's closeout system, IRIS.	
Award Creation & Modification	COEUS becomes the single source of truth for sponsored grants and contracts. COEUS will be fully integrated with Workday, facilitating set up of awards, award lines and grants.	
	Grant manager will be responsible for entering the detailed budget into Workday when new awards are created, or existing awards are amended. They will be prompted to do this when the award record has been created/modified. They will also be responsible for submitting budget amendments as needed. Entering a detailed budget will facilitate management of budget to actual spend monitoring directly in Workday. Post award finance will approve all budget and budget amendments that are entered before they go into effect.	
Award Portfolio Management	Central team(s) will manage portfolios of awards.	
Costing Allocations	Costing allocations are set up in WD; though they do not expire, delivered WD functionality will prevent payroll costs to charge an award line that is expired (past its end date). Payroll will charge to the employee's default cost center in these instances until the costing allocations is updated.	
Cost Share	Cost share will only be recorded when it is mandatory or committed. There will be no cost share as a means to manage cost overruns.	
Cost Transfer	Grant managers will no longer use paper forms to request/justify cost transfer journal entries. Process will be managed within Workday.	
Effort Certification	Effort certification reporting will be managed in Workday and more automated; VUMC will implement a quarterly effort certification process for federally sponsored effort consistent with Workday delivered processes and industry best practice.	
Financial Transactions (Non-patient/ Sponsored billing)	Workday will automate collections process and integration with banking, management, sub-ledgers.	
	Workday will provide centralized billing functions to increase visibility and process consistency.	
	Workday has an automated cash receipt process to eliminate manual efforts and to increase completeness and accuracy of cash application.	
	Workday enables automation of single system of record to reduce number of data sources and governance.	
Grant Management	Grant managers will be notified when grant-related worktags appear on expense reports and requisitions.	
Spending	Workday system limitations do not allow for spend outside of award line dates. Payroll expense posted after the award line end date will not post to grant, but rather to employee's default organization assignment. Non-payroll expenses will not be allowable at 90 days after the award line end date.	
	Updated policy for overspending as it relates to grants/awards in WD. Deficits can be carried from month to month on active awards but must be cleared in advance of award closeout. Deficits not cleared in advance of award closeout will be cleared by central finance via accounting journal that will not reverse.	

Subaward Setup	Individual award lines are required for each subaward contract in WD. OSP will set up the award line when the subaward contract is fully executed, pushing a modification of the award into WD. Post award finance will subsequently set up a supplier contract at this time for the incoming invoices to be paid against.	
	Invoices will be entered into WD by post award finance, routed to the grant manager for PI approval and authorization to pay. Compliance review of the invoice will occur prior to payment- all part of a WD business process	
VU Grants	VU Grants will be set up as Grants within Workday. VA IPA's are being set up as Grants within workday. Grant related residual funds will not be setup with grant worktags within Workday as they are not subject to grant accounting requirements. Residual Funds have been assigned a Program Id in Workday.	

RECOMMENDATIONS

- Research staff and grant-funded employees will be assigned training for the functionality they use in Workday.
- Managers should be prepared to help staff transition from some existing systems into Workday.
- Administrative staff in research should prepare to transition to a more proactive model of managing sponsored awards.

SUPPLY CHAIN

KEY CHANGES & IMPACTS BY TOPIC

Topic	Key Changes	Impact
Accounts Payable	Miscellaneous payments will be captured with daily scheduled settlements. Departments will populate an excel document that mimics the EIB upload for Misc. Payees and Payments. Both documents will be uploaded rather than keyed manually.	Yellow
	Requests for checks to Suppliers for invoices that do not have a PO will run through Workday. Departments will submit Supplier Invoice Requests.	Green
	Financial posting will occur in real-time as approvals are processed, rather than batched processing.	Red
	Freight expenses are created as a line via an integration and booked on a central supply chain account (excluding capital purchase-related freights).	Red
	Departments will see the original invoice posted in first month and then an invoice adjustment once a matching exception has been resolved.	Yellow
	Departments will have access to matching exception reports as soon as transactions post, rather than having to wait overnight.	Yellow
	Workday has a prepaid invoices workflow. Finance will receive notification to create amortization schedule based off invoice detail.	Yellow
	Workday will automatically notify contract specialist of pricing changes (lower than expected) rather than initiate a matching exception.	Yellow
	RNI Receipts will be done automatically based on goods receipts in real time. We will be able to use RNI to reach out to Supplies for outstanding invoices and prevent slow payment and credit holds.	Yellow
	Workday automatically manages tax adjustments.	Yellow
Expenses	Expense reporting processes that take place in Concur will move into Workday. Travel booking will remain in Concur and will not interface from Concur to Workday. Concur travel booking expenses will be added manually in Workday.	Red
	PCard and T&E tracking, reconciliation, and reporting will move from USBank Access Online to Workday.	Red
	Managers will take on many of the expense approval/denial responsibilities currently managed through Privilege Management assignments (Expense Report Approver role in PM). PCard managers will be the cardholders' managers.	Red
	Expense Reports will be approved with the same approval levels as purchase orders and invoices. Managers approve first, then cost center managers, then additional approvals based on dollar amount and/or worktag.	Yellow
	Grants will be able to utilize PCards for expense reporting.	Yellow
	Expense reporting in Workday will have defaults preselected based on user's Cost Center, Fund Source, Operating Entity, and Company.	Green
	Reimbursement/payment defaults to payroll direct deposit information; employee can update/change if needed.	Green
	Workday uses some different terminology for expense types.	Green
	Approvers can deny expense reports in Workday. If approver denies a report, it is completely closed and cannot be edited. However, the approver can send the expense report back to the creator.	Yellow

	Expense report submitter must select funding source type on every expense report (general, temporarily restricted, permanently restricted, sponsored, etc.).	
	Grant-related expenses will route to Grant Managers via worktags.	
Inventory	Stocking locations must be created before materials can be added to them; no more ability to add ad hoc locations as free text.	
	Only VUAH Clinical Labs Storeroom Inventory will be managed in Workday. Remaining inventory locations managed by POU/Optiflex currently will be managed in Tecsys in the future state.	
	Clinics using PMM/HSS will use Workday for purchases.	
	Min/Max data is based on base unit of measure. Previously Min was based on issue unit of measure and Max was based on purchase unit of measure.	
	Users from any location will submit the task Inventory Stock Request, select items and confirm quantity available, then submit a request which would be reviewed by Materials Management, who will then pick and deliver.	
Item & Supplier Master	Item Master will reside in and be managed through Workday.	
	Some formerly ad hoc processes will require formal review and approval.	
	Different item identification and tagging systems will be used in Workday. New item setup will be required for substitutes and/or replacements; no more item number reuse.	
	Tecsys will be used to track high-value items and tissues in some clinical settings.	
	There will be a new Supplier Portal for viewing of purchase order and invoices processed by the supplier.	
	Primary item identifier will be the Item Name, not the Item Number. Some items can be identified with UDI (unique device identification).	
	New supplier requests will follow an automated workflow and approval process, including the manager role. Certain supplier change requests can be made via the supplier portal, and changes will go through an approval workflow.	
	All employees can request new item additions through a Workday questionnaire submission process.	
	Some items (mostly clinical) will be grouped into families and identified by a standard set of colors. These groupings will be standardized across all VUMC facilities.	
	For Tecsys users - Two types of Tracked Locations have been created: 1. Tissue 2. High dollar value items (currently defined as more than \$5000 unit cost) Each OR core will have one high \$ value tracked location created. All Tracked Items will need to be received TWICE: First time into Workday using the Workday receiving app on TC52 in order to receive against the PO; Second time into Tecsys using the Tecsys app on TC52 in order to generate and print the yellow tracked label.	
For Tecsys users - For items requiring lot, expiration, and serial numbers, the information will be captured at receiving for tracked items and for non-tracked items, the information will need to be captured at putaway. Tracked items will have a yellow label, which must be printed & attached.		
Payment Processing	New Supplier Invoice Request replaces current process called Check Request. New approval workflows may be required.	
	Utility invoices will be processed by Disbursements and will not include the execution of a purchase order.	
	Receipts will be required for all purchase order invoices (goods and service).	

	New roles in Workday called VUMC Central Receiver and NonCentral Receiver will be responsible for marking goods/services as received. Invoice will not be scheduled for payment until marked as "received."	
	If goods/services not marked as "received" in Workday within 3 days of invoice, notification will be sent to cost center manager.	
	Subject Participants and Patients will no longer be added to the supplier master to facilitate payment. Miscellaneous Payment process will be utilized.	
	Inbound Freight expenses will be centralized under one cost center (Supply Chain).	
	Lease contract invoices will no longer be PO driven (scheduled invoices).	
	New process - key change between supplier invoice request and miscellaneous payment. Miscellaneous payments do not require the payee be set up as a supplier. Departments will populate an excel document that mimic the EIB upload for Misc. Payees and Payments. Both documents will be uploaded rather than keyed manually.	
	Utility payments will be processed without a purchase order directly from the Supplier Invoice.	
	Transactions will post to the GL as soon as the AP team member hits the submit button.	
	Suppliers will enter in their own information into the Supplier Portal, eliminating keying error, banking errors, which helps control fraud. Supplier can see payments, invoices, POs, which reduces emails.	
Procurement	Workday will provide more automation of procurement functionality, including auto-generating various fields (PO number, etc.).	
	Special handling purchase order suffixes will no longer be utilized.	
	Supplier must be established in the system to create a purchase order.	
	Purchase Orders cannot be created if the Supplier status is HOLD.	
	Purchase Orders require a contract number or attachment for orders greater than \$25,000	
	Purchase Order approval limits have increased based on job code/title.	
	Purchase Orders will no longer be utilized for subawards. Leases, Rentals, and Subaward contracts will automatically initiate the invoice payment request from the contract.	
	Returns \$50 or less will not be processed unless charged to a grant or part of a product recall.	
	Some formerly ad hoc processes will require formal review and approval.	
	Buyers officially issue Purchase Orders, but only after requisitions have been approved by the required approval workflows in Workday.	
	Grant Managers approval will be required if a grant worktag is utilized on a requisition.	
	Spend Categories will be utilized to determine the buyer that will source (execute) the approved requisition into a purchase order.	
	Capital requisitions will require a Project ID, Trackable Spend Category, and a funding source worktag such as Cost Center ID, Grant ID or Gift ID. Receipt is captured in Workday. Requisitioning division/area assigns status of "Approved" in Workday Capital Planning to begin capital requisition process. All capital requisitions originate in Workday Capital Planning.	
	Ship to locations must be tied to a business asset and/or business site as established by Finance and HR. For rare exceptions where a ship to is not tied to a business asset and/or business site, a justification will be required and must be approved prior to set up.	
Tecsys	Many new tracking processes will be required to implement Tecsys as the clinical supply tracking system. Staff in some clinical areas will learn	

	a new Two-Bin Kanban system for replacing standard supplies in stockrooms.	
	Barcodes will be scanned at the Kanban bin level or item level to confirm putaway. Nurses will deplete items from primary bin first, place the primary bin RFID tag on Smart Panel boards when they're empty and then source items from secondary bin. Additionally, potential process changes for SCM to rotate stock at putaway (secondary bin stock is place on primary bin, while the newly received stock is placed on secondary bin).	
	Tecsys will replace current inventory tracking tabs in eStar/Epic. Tecsys will appear as a single separate tab within Epic. Information will flow from Tecsys into Epic, and the same documentation will not need to be completed separately in both systems. Tecsys timestamps are more accurate when scanning an item.	
	Item cost in inventory reports will be generated from location item average inventory cost, rather than the Item Master.	
	Time and location will still be a driving factor of how cases are picked. Case picker is provided a handheld that will route the order in which they pick cases. End user is unable to see all cases needing to be picked. Items that still need to be picked at another facility will remain on the handheld, a packing list of the items will be placed on the case cart for review by clinical staff. Additional picks still needed will be highlighted. Cases will follow a defined pick path to reduce the number of steps that they take. Clinical staff will place unused items back on the case cart used for the procedure and place the case cart back in the hallway. We will differentiate VCCOC picked items from core picked items with a color sticker/dot.	
	Each inpatient location will have a corresponding chargeable (perpetual location) to hold chargeable items. Approximately 430 Inpatient location items to be moved to chargeable locations.	
	Hospital at Home will be configured as an inventory location in VUAH. VBCH and VTHH each will have a kiosk installed at the service center/storeroom to scan patient chargeable items. The charge sheet will still be used by Nursing.	
	Tecsys will only capture whether the tissue temperature is within a specific range. Team will document the tissue temperature in Epic and whether the sample was in the range in Tecsys.	

RECOMMENDATIONS

- Training clinical staff who will move to using the Tecsys two-bin Kanban system will be required on a rolling basis as new areas adopt the system.
- Staff who currently use eProcurement will require training and support for their transition to Workday.
- Staff will need awareness and reminders to mark purchased items as received in Workday.
- Many core Supply Chain team processes will change and/or be automated with Workday, which will require training.