Research Workday Town Hall
March 21, 2024

Research Workday Town Hall Agenda

March 21, 2024

- Supply Chain Update: FedEx Deliveries
- Preparation for OCR
- VU Grant Reminders
- Award Correction Process Enhancements
- Q&A

Supply Chain Update: FedEx Deliveries

FedEx current state

- How many trucks per day – 3
  - Express
  - Priority/Standard Overnight
  - Ground
- What time do the FedEx trucks currently arrive at VUMC
  - Express – **8 to 8:30am**
  - Priority/Standard Overnight – **11:00am**
  - Ground – **1:00pm**

FedEx Future State

Express

Express Deliveries will go live April 1

- ✓ FedEx has 2 full-time employees assigned to VUMC
  - ✓ VUMC will have 2 FTE's
- ✓ FedEx will deliver to the MCJCH dock
- ✓ 1st overnight arrives between 8:00am-8:30am (10-15 packages)
- ✓ 2nd delivery is priority and standard overnight delivered together ~11:00am
- ✓ Delivery will be sorted, received and stated for delivery to labs/suites by VUMC receiving tech
- ✓ **All packages/letters including temp sensitive packages will be delivered the same day that VUMC receives them**
- ✓ FedEx **requires** the receiving tech to sign for deliveries. This will show as "delivered" in their system but does not mean the VUMC receiving tech has delivered to the dept/laboratory
- ✓ **Labs can sign for each other and will ensure temperature requirements are met**
- ✓ **We will not be taking team sensitive packages back to receiving which is the same practice that FedEx follows today**

Express package breakdown for the week of 02/12/2024

- Monday 87 packages - **68 Boxes/19 Documents**
- Tuesday 130 packages - **118 Boxes/12 Documents**
- Wednesday 77 packages -**69 Boxes/8 Documents**
- Thursday 87 packages- **77 Boxes/10 Documents**
- Friday 99 packages- **89 Boxes-10 Documents**

March

Garland Ave
Pierce Ave
1161 21st Avenue
Medical Center Drive

Express
Ground

MCN Dock

FedEx staff sort and load for delivery

Various Suites/Labs

FedEx staff deliver/lab receives

April

Express

First truck 8:00-8:30am
Temp sensitive packages

VUMC Receiving Tech at MCJCH

Sorts, receives, loads

Various Suites/Labs

VUMC Receiving Techs deliver

Ground

MCN Dock

FedEx staff sort and load for delivery

Various Suites/Labs

FedEx staff deliver/lab receives

FedEx Future State
Ground Delivery

- 2 FedEx ground FTE's assigned to VUMC
  - **VUMC will have 2 FTEs dedicated**
- **No temperature sensitive packages**
- FedEx will deliver **by noon daily to the Dayton Ave warehouse** (15 mins from campus)
- Delivery will be sorted, received and loaded for delivery
- Delivery goal internally between 2:30-5pm
- Will allow for labs to sign for each other
- If no one is available for signature, then a picture will be taken of the room

Ground volume

- Monday ~125 packages and then decreases through the week

May

Express

First truck by 8:00-8:30am
Second truck…….
Temp sensitive packages

VUMC Receiving Tech at MCJCH

Sort, receive, load

Various Suites/Labs

VUMC Receiving Tech deliveries immediately following receiving

Ground

Truck to arrive by noon

No temp sensitive packages

VUMC Warehouse Receiving Tech

Sort, receive, load

Various Suites/Labs

VUMC Receiving Tech delivers between 2:30 -5pm

FedEx Pickup

FedEx drop boxes
- 10 currently on site
- No change to pick up times

Onsite central drop in USPS located in basement MCN
- B0106
- Extended time to get packages there to 5pm
- Pickup by FedEx will be 5-7pm

Call FedEx for pick up for anything over 10lbs
- Include a note for driver to bring a hand truck

Additional information

Training of staff

Maps of buildings/rooms provided

Shadowed FedEx delivery personnel

Routes will be the same

Staff take VUMC safety courses annually for hazardous materials/chemicals

Any package that does not have a packing slip will not be opened

Emergent need

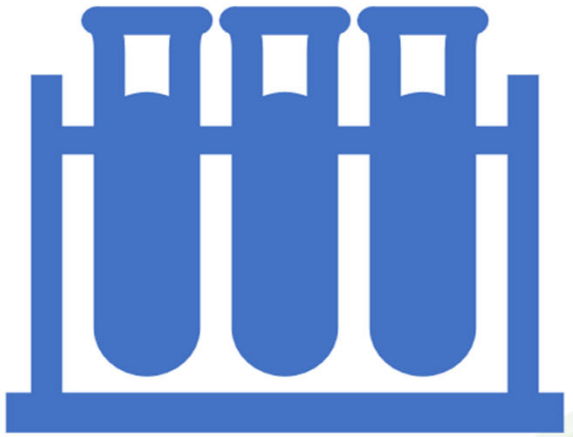
Call (number to be provided) and notify VUMC receiving tech that a pick up will occur

Letters or Non-Workday orders

Will utilize same system the post office uses to obtain signatures

What you can do to help this be successful

- Make sure your address includes the suite/lab number
- Make sure your location is easily identified with suite/lab number
- Have a clearly marked delivery location in your lab/suite
- Be willing to sign for your colleagues and **ensure cold storage requirements are handled timely**
- Provide an accurate phone number
- Call the VUMC receiving tech if there is an immediate need for a delivery that you want to pick up directly



Service Providers

Scott McMillian – Manager VUMC Central Warehouse

- scott.a.millian@vumc.org

Justin Griggs – Director Supply Chain Resiliency

- justin.Griggs@vumc.org

Karen Morlan – VP Supply Chain Operations

- karen.Morlan@vumc.org

myworkday

Preparation for OCR

(Optical Character Recognition)

Invoice Process Automation

- SCM Accounts Payable team seeks to optimize productivity by automating the processing of invoices in Workday
- SCM's objective is to remove manual, repetitive steps
- Selected software for this initiative is Automation Anywhere.
    - Automation Anywhere is a cloud-based solution, leveraging Optical Character Recognition (OCR) technology and Machine Learning to automate the manual creation of supplier invoices.
- Planned Go Live - TBD

myworkday

Invoice Process Automation

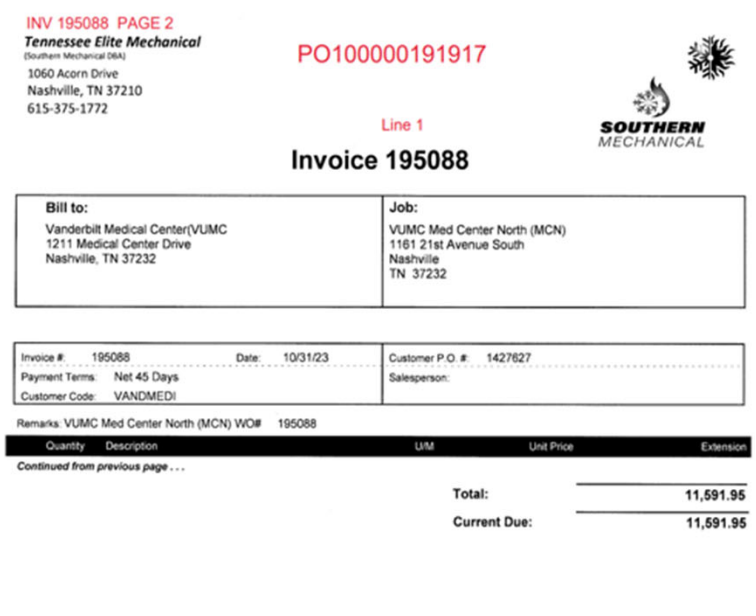
- Convert any handwritten notes into text
- Ensure scans are “clean” and utilizing the requested preprocessing format: **ALT PO:**
- Respond to request from Dayne Foti (dayne.foti@vumc.org)

What can you do in support of this project?

Invoice Process Automation

Best Practices : Alternative Purchase Order example

- By simply adding the "Alt PO:" in front of any purchase order intended to take precedence, it creates a clear indication regardless of color, font, placement, etc. for the OCR to pick up with 100% accuracy every time. In addition, by listing what line this invoice is referencing allows the OCR and Bots to ensure it applies money correctly on the invoice when there is no SKU/exact Item Reference (ex. Service or Blanket Orders).



INV 195088 PAGE 2

Tennessee Elite Mechanical
(Southern Mechanical DBA)
1060 Acorn Drive
Nashville, TN 37210
615-375-1772

PO100000191917

Line 1

SOUTHERN MECHANICAL

Invoice 195088

Bill to:	Job:
Vanderbilt Medical Center(VUMC 1211 Medical Center Drive Nashville, TN 37232	VUMC Med Center North (MCN) 1161 21st Avenue South Nashville TN 37232

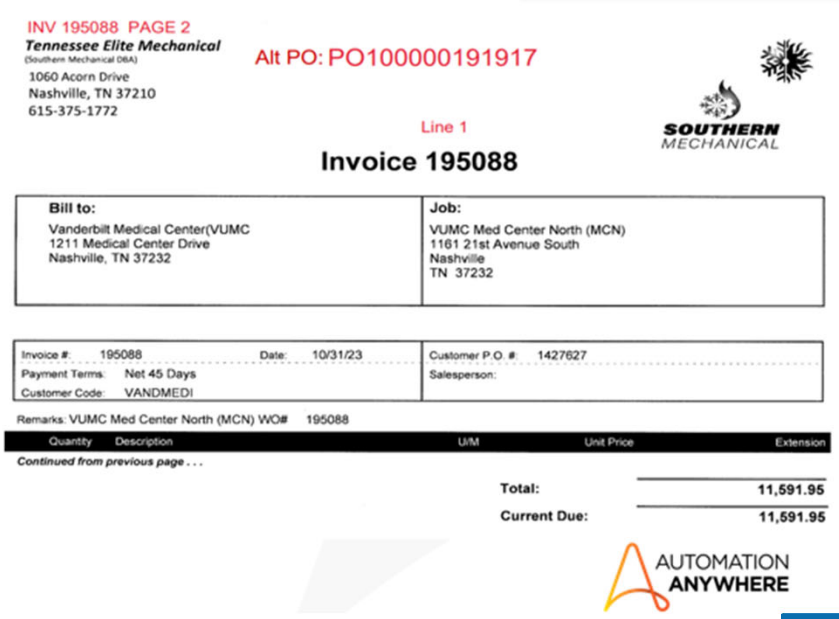
Invoice #: 195088	Date: 10/31/23	Customer P.O. #: 1427627	
Payment Terms: Net 45 Days		Salesperson:	
Customer Code: VANDMEDI			

Remarks: VUMC Med Center North (MCN) WO# 195088

Quantity	Description	U/M	Unit Price	Extension

Continued from previous page . . .

Total:	11,591.95
Current Due:	11,591.95



INV 195088 PAGE 2

Tennessee Elite Mechanical
(Southern Mechanical DBA)
1060 Acorn Drive
Nashville, TN 37210
615-375-1772

Alt PO: PO100000191917

Line 1

SOUTHERN MECHANICAL

Invoice 195088

Bill to:	Job:
Vanderbilt Medical Center(VUMC 1211 Medical Center Drive Nashville, TN 37232	VUMC Med Center North (MCN) 1161 21st Avenue South Nashville TN 37232

Invoice #: 195088	Date: 10/31/23	Customer P.O. #: 1427627	
Payment Terms: Net 45 Days		Salesperson:	
Customer Code: VANDMEDI			

Remarks: VUMC Med Center North (MCN) WO# 195088

Quantity	Description	U/M	Unit Price	Extension

Continued from previous page . . .

Total:	11,591.95
Current Due:	11,591.95

AUTOMATION ANYWHERE

What can you do in support of this project?

VU Grant Reminders

VU Grants – REMINDERS

VU Grants = VU Endowment Distributions to VUMC

- **Total available funds for FY24 = $36.6M**
- **Expectation is that 100% of available funds will be spent**
- CBOs must attest to spending on each VU grant at fiscal year end
- Annual reports are signed by VUMC leadership and submitted to VU leadership, at the VU Grant Award level
- VU reviews/audits a sample of transactions each year
- VUMC leadership receives communication on results of VU review

GOAL:

Compliant and 100% spent by fiscal year-end

VU Grants – Current Status

$24.7M available to bill through 2/24 close*

$19.9M spent

$ 4.8M available to bill and unspent for 8 months

Review and increase spending on VU grants for 3rd quarter close:

- Can Payroll Costing Allocations (PCAs) be updated?
- Are there any capital items you need to purchase?
- Are there other appropriate charges to spend these funds?

Questions: Contact your Office of Finance Sponsored Programs Manager or Lynn Capps for assistance

***total awarded for FY24 = $36.6M**

GOAL:

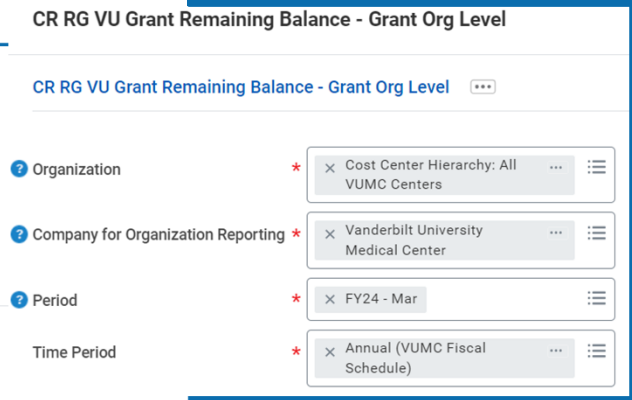
Compliant and 100% spent for FY24

VU Grants – Workday Remaining Balance Report

How do I find the balances on my VU Grants?

CR RG VU Grant Remaining Balance – Grant Org Level

(for billing VU)



CR RG VU Grant Remaining Balance - Grant Org Level

Organization	Cost Center Hierarchy: All VUMC Centers	Period	FY24 - Mar
Company for Organization Reporting	Vanderbilt University Medical Center	Time Period	Annual (VUMC Fiscal Schedule)

481 items

Grant	Grant ID	Award ID	Award	Award Purpose Code	Cost Center	Grant Manager	Sponsored Programs Manager Cost Center	Award Line Start Date	Award Line End Date	Award Line Lifecycle Status	Award Line Amount
GR006927 4047707839 RESIDENT EDUCATION ENDOWED FUND IN THE DEPT. OF PLASTIC SU	GR006927	AWD001565	AWD001565: RESIDENT EDUCATION ENDOWED FUND DEPARTMENT OF PLAS 04/30/2016 (version 0)	VU Grant- Fellowship and Resident Education Funds	CC03115 Surgical Sciences - Plastic Surgery Dept - Plastic Surgery Div - CD Acad Grants Gifts	Christy Hinkle (0056967) Christy Nichols (0004092) Dianne Mason (0076828) Ginger Barnett (0144722) Thuy Vu (0011354)	Samantha McCabe (0208787)	07/01/2023	06/30/2024	Active	$14,882.64
GR005731 4045758169 NASHVILLE PREDATORS-365 CANCER FUND - INCOME	GR005731	AWD001490	AWD001490: NASHVILLE PREDATORS PEDIATRIC CANCER RESEARCH FUND 04/30/2016 (version 0)	VU Grant- Research Funds	CC03012 Pediatrics - Hematology Div - CD Acad Grants Gifts	Mustafa Nateqi (0081251)	Melanie Nichols (0119751)	07/01/2023	06/30/2024	Active	$49,664.28
GR005644 4048007849 MCDANIEL CUTANEOUS LYMPHOMA GIFT FUNDS	GR005644	AWD001597	AWD001597: CUTANEOUS LYMPHOMA RESEARCH FUND 04/30/2016 (version 0)	VU Grant- Research Funds	CC01156 Dermatology - CD Acad Grants Gifts	Amy Nazario (0164880) Emily Robertson (0190948)	Meghan Bonadies (0174164)	07/01/2023	06/30/2024	Active	$1,905.86

VU Grants – Workday Remaining Balance Report

How do I find the balances on my VU Grants?

CR RG VU Grant Remaining Balance – Grant Org Level

(for billing VU)

CR RG VU Grant Remaining Balance - Grant Org Level

Organization	Cost Center Hierarchy: All VUMC Centers	Period	FY24 - Mar
Company for Organization Reporting	Vanderbilt University Medical Center	Time Period	Annual (VUMC Fiscal Schedule)

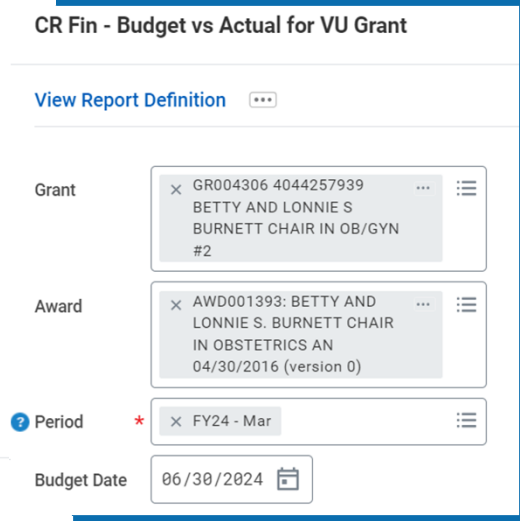
481 items

Feb	Nov	Sep	Jan	Oct	Dec	Jul	Aug	Mar	Total Fiscal Year Actuals	Remaining Balance (Current Period YTD)	% Remaining
Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals	Actuals			
$1,087.87	($212.57)	$989.83	$8,773.01	$989.83	$989.83	$4,918.46	$590.87	0.00	$18,127.13	$62,655.34	77.56%
$14,953.51	$14,426.57	$16,641.01	$14,953.51	$14,426.57	$14,426.57	$12,212.13	$14,426.57	0.00	$116,466.44	$62,158.84	34.80%
$32,580.84	$5,192.31	$13,618.93	$20,663.62	$15,624.02	$12,652.69	$12,815.78	$11,642.10	$310.41	$125,100.70	$60,553.12	32.6

VU Grants – Workday Budget vs Actual for VU Grant

CR Fin - Budget vs Actual for VU Grant

Department tool – as current as your budget details



CR Fin - Budget vs Actual for VU Grant

Grant: Sample Grant Name ABC123 DEPT XYZ

Award: Sample Award Name

Period: FY24 - Mar

Budget Date: 06/30/2024

6 items

Object Class	Grant	Award	Grant From Date	Grant To Date	Budget	Actuals	Remaining Balance	Commitments	Obligations	Remaining Balance After Encumbrances	Percentage Remaining
Salaries	Sample Grant Name ABC123 DEPT XYZ	Sample Award Name Dkeud hgls nnf 04/30/2016 (version 0)	07/01/2023	06/30/2024	0.00	$102,613.58	($102,613.58)	0.00	$52,699.60	($155,313.18)	0.00%
Fringe Benefits	Sample Grant Name ABC123 DEPT XYZ	Sample Award Name Dkeud hgls nnf 04/30/2016 (version 0)	07/01/2023	06/30/2024	0.00	$13,852.86	($13,852.86)	0.00	$7,114.44	($20,967.30)	0.00%
Materials & Supplies	Sample Grant Name ABC123 DEPT XYZ	Sample Award Name Dkeud hgls nnf 04/30/2016 (version 0)	07/01/2023	06/30/2024	$34.64	0.00	$34.64	0.00	0.00	$34.64	100.00%
Other Direct Costs	Sample Grant Name ABC123 DEPT XYZ	Sample Award Name Dkeud hgls nnf 04/30/2016 (version 0)	07/01/2023	06/30/2024	$992,121.58	0.00	$992,121.58	0.00	0.00	$992,121.58	100.00%
Total Direct Costs					$992,156.22	$116,466.44	$875,689.78	0.00	$59,814.04	$815,875.74	82.23%

GOAL:

Compliant and 100% spent for FY24

VU Grants - Utilization Guidelines

Link:

Follow All General Guidelines, then refer to permissible expenditures by the following fund types/Utilization Category:

- Scholarships for undergraduate, graduate and professional students
- Prizes and Awards for students, faculty and staff
- Fellowships and Resident Education Funds
- Faculty Chairs and Professorships
- Faculty Career Development Awards, Dean's Faculty Fellows, Chancellor Faculty Fellows
- Research Funds
- Lectureships

myworkday

GOAL:

Compliant and 100% spent for FY24

VU Grants - Spending:

- Must be **according to donor's intended purpose** and VU's Utilization Guidelines.
  - Alcohol – Per the Utilization Guidelines, alcohol or entertainment expenses should be consistent with VU's travel and entertainment policy. The VU policy specifies that alcohol should be charged to an unrestricted funding source, which is not a VU Grant.
  - Alcohol should only be charged when documentation from the donor exists that specifically states alcohol is an allowable expense.
- Should only be for **current fiscal year transactions**. Prior years have been certified, audited and closed, so additional transactions from a prior year are not appropriate.
- Must **not exceed annual award amount**. No deficits.
- Is reimbursed by VU on a monthly basis, up to the annual award amount.
- Must be **direct charges on VU Grant worktags** – no revenue transfers, no indirects.
  - VU requires annual reporting by natural class account, so non-salary expenses should be posted to the VU Grant using the original ledger account.
- Monthly **review of expenditures is important** in preparation for spending 100%.

myworkday

GOAL:

Compliant and 100% spent for FY24

VU Grants - Questions

Questions:
Contact your Office of Finance Sponsored Program Manager or Lynn Capps for assistance

Award Correction Process Enhancements

Award Correction Process Enhancements

Award Correction: Business processed used to MODIFY an existing award record

What: The business process has been enhanced to require review by post award (Finance) for specific correction reasons. Most corrections are triggered by OSP changes from Coeus.

Why: VUMC abandoned use of the award amendment business process because of the impact of effective dating on award cost processing. Workday released functionality that allowed for business process routing on award corrections, which was not available to us at go-live.

Changes to this process have been made to ensure the post award team is reviewing any modification to an award that impact funding, accounting or timing of financial reporting.

EXAMPLES:

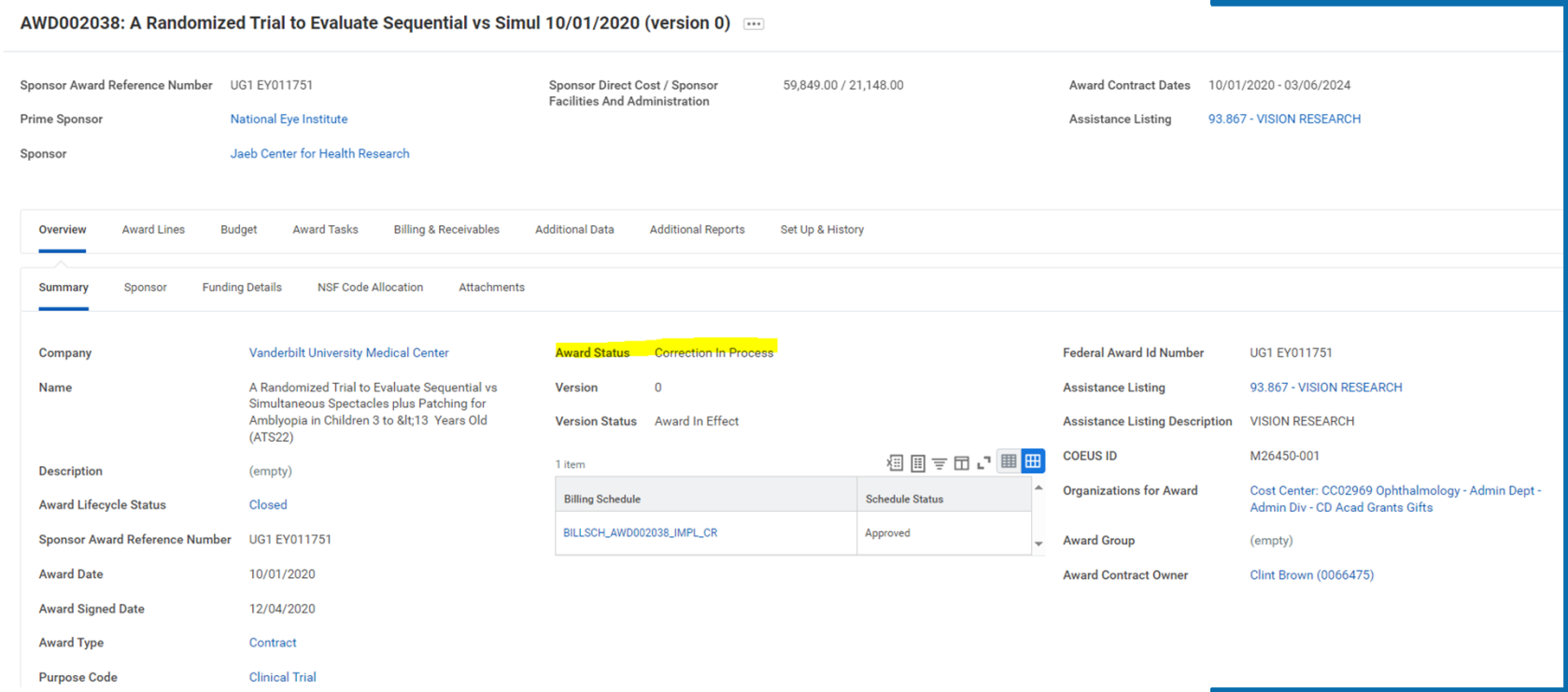
- Award Line Addition (new year of funding, subaward, etc)
- Cost Center Change (as requested by department only)
- Funding Change (increase, decrease, etc of existing award line amounts)

myworkday

Award Correction Process Enhancements

Department Impact

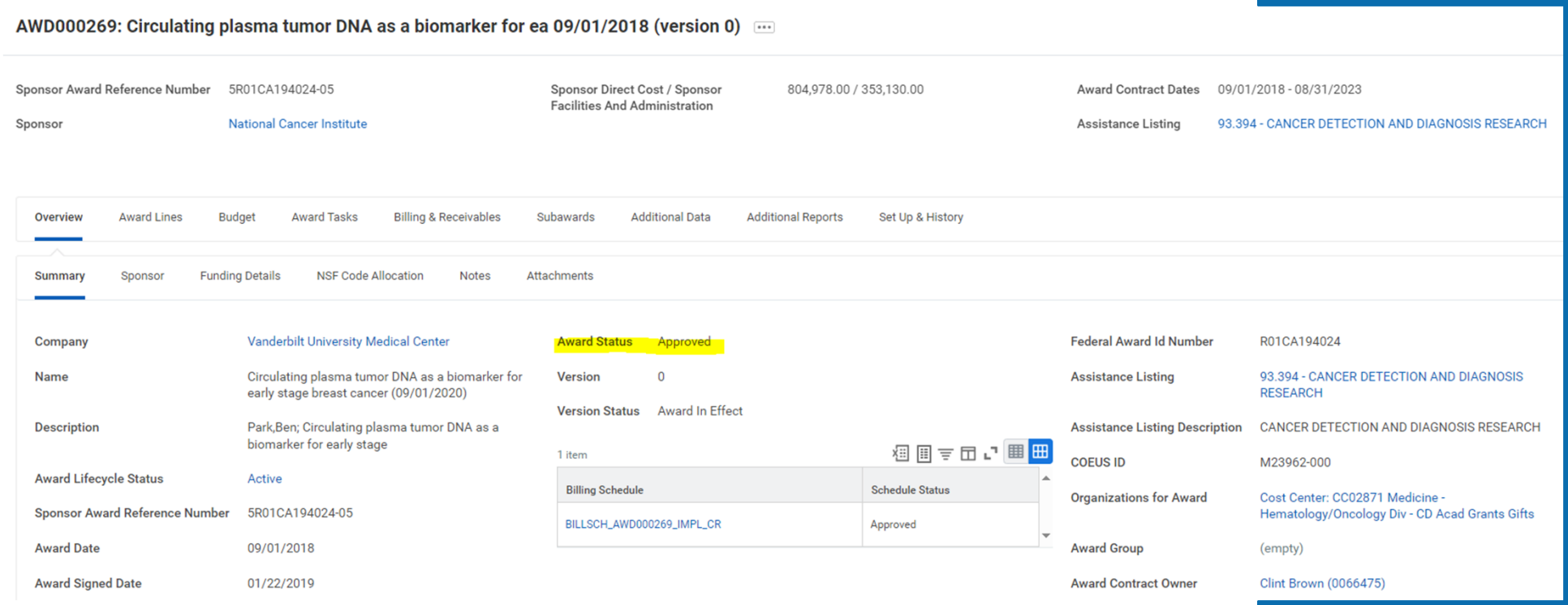
- Corrections requiring approval are not in effect until it is fully approved
- If not fully approved, On the award record, you will see a status of 'Correction in Progress'
- Once submitted to Workday, corrections are approved no later than 2-3 business days from initiation.



Award Correction Process Enhancements

Department Impact

- Award records that are in effect with no pending correction will have a status of Approved

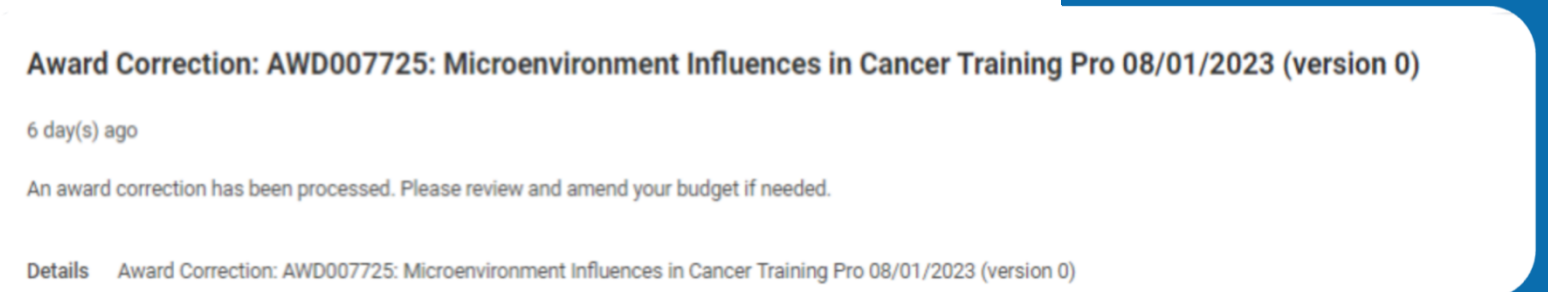


Award Correction Process Enhancements

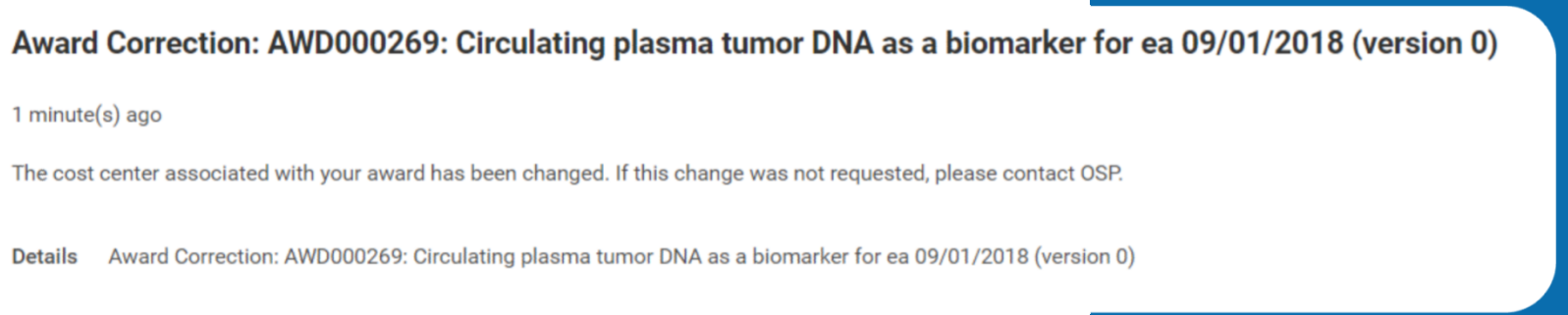
Department Impact

Notifications are now triggered for award corrections:

- Grant Managers will receive a Workday notification when an award correction is fully approved for the following reasons:
  - Award Activation
  - Award Line Addition
  - Funding Change



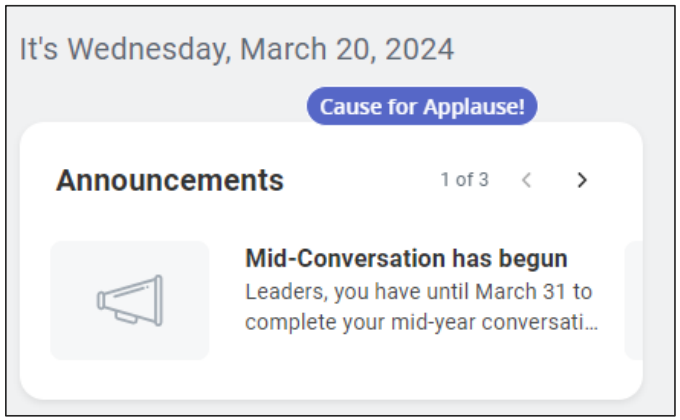
- Grant Managers will receive a Workday notification when an award correction is fully approved for the following reason:
  - Cost Center Change



myworkday

WalkMe

Do you see WalkMe on the Workday Home Page?



How to Get WalkMe

Quick Links:

Install the WalkMe Plugin - Using the WalkMe Menu

Install the WalkMe Plugin

To have the full experience of WalkMe while using Workday at VUMC, you must have the WalkMe add-in extension added to your computer. If you do not see the **WalkMe Menu** icon on your screen when you log into Workday, you do not have the extension installed.

If you do not have administrative rights to your machine, please contact the VUMC IT help desk for assistance installing the add-in to your machine.

PC / Windows Instructions

1. Navigate to the All-in-One Installer **here**.
2. Select Windows Installer 32-bit or 64-bit.
3. Select all Browsers and click Download.
4. Locate the MSI file and run the file on your local computer (you will need to have Admin privileges to install).
5. Restart browser and confirm you see the extension.

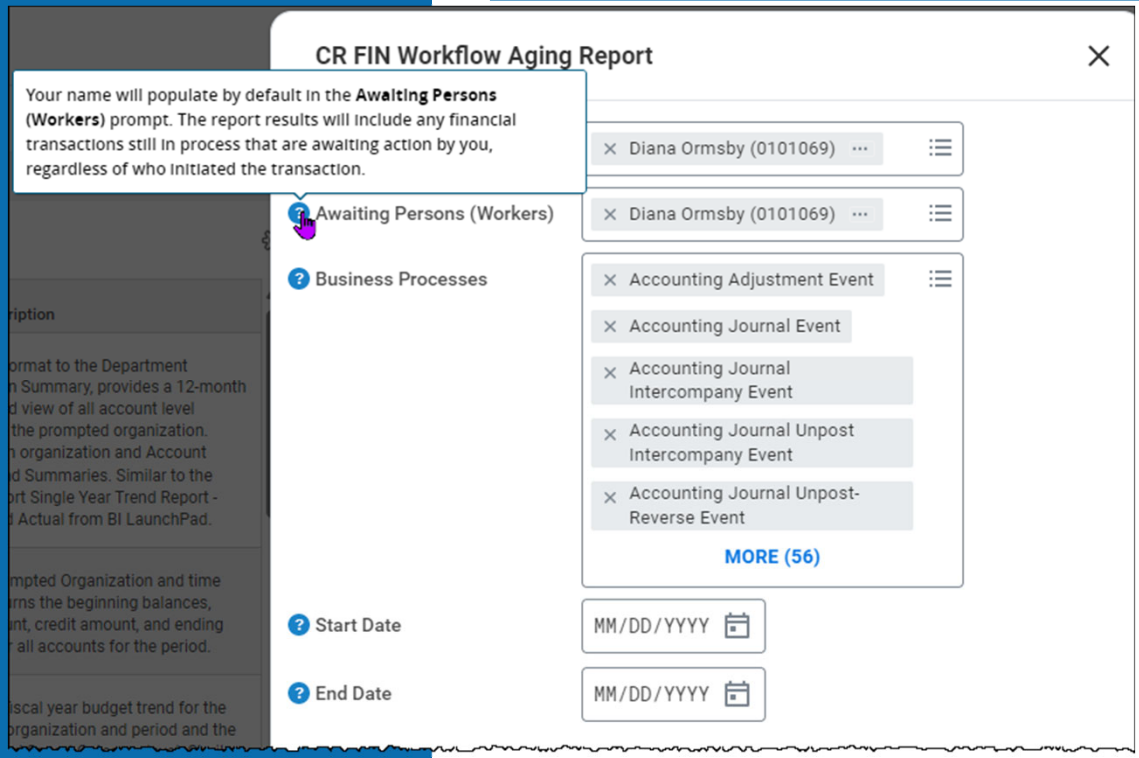
Macintosh - Chrome / Edge Instructions

1. Navigate to the Mass deployment guide **here**.
2. Select Mac; then select Chrome or Edge.
3. Select Deployment Method - Jamf.
4. Download the file from Step 1.
5. Find the .mobileconfig file on your computer and run the file on your local computer (you will need to have Admin privileges to install).
6. Restart browser and confirm you see the extension.

Macintosh - Safari / Firefox Instructions

1. Navigate to the All-in-One Installer **here**.
2. Select MacOS PKG; then select Safari or Firefox.
3. Select Downlaod for MacOS (a PKG file will be downloaded to your computer).
4. Locate the PKG file and run the file on your local computer (you will need to have Admin privileges to install).

WalkMe Tips Example: Workflow Aging Report*



**This is one report example. Similar tips have been added to prompts and resulting reports for many reports already in Workday, including the soon-to-be-released PI Dashboard.*

Days Since Assignment will display the number of days the current item has been awaiting the action listed.

Click on the column header to sort or filter the results.

Initiating Person	Initiating Worker	Status of Event Records Awaiting Action	Date and Time Initiated	Awaiting Persons (Workers)	Business Process Type	Business Process Event	Business Process Step Awaiting Action (Includes Subprocesses)	Days Since Assignment	Due Date	Transaction Status

Next Research Town Hall: April 18, 2024

Questions?