**VUMC BUSINESS EDUCATION**

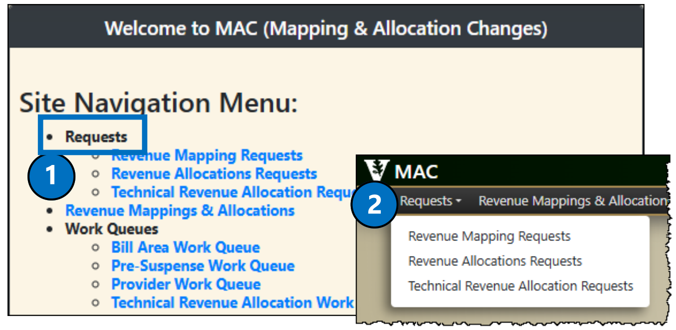
# Mapping & Allocation Changes

The Mapping and Allocation Changes tool is available for users to review and request changes to their Revenue Mapping and Allocations within Workday. Currently, this tool is for PB Collections which are posted to the General Ledger on the first business day of the Monthly Close cycle.
This tool is available at https://finweb.app.vumc.org/apps/dofappmac.

## Requests

To submit a new request or review the current status of your submitted requests, click one of the following:

1. From the menu, select **Revenue Mapping Requests**, **Revenue Allocation Requests**, or **Technical Revenue Allocation Requests.**
2. From any screen, on the top bar, use the **Requests** drop-down menu.




## Review Revenue Mapping

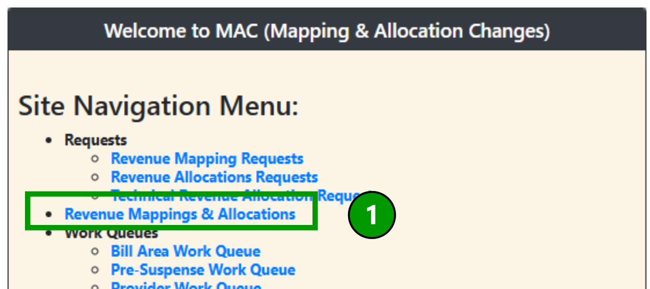
1. Log into the tool using your VUMC ID and ePassword. Click **Revenue Mapping & Allocations** from the Site Navigation Menu.
2. In the top search bar of the tool, select your **Financial Division** from the drop-down menu.
3. Use the **Subdivision** dropdown to further filter your results (optional). Default will be "All".

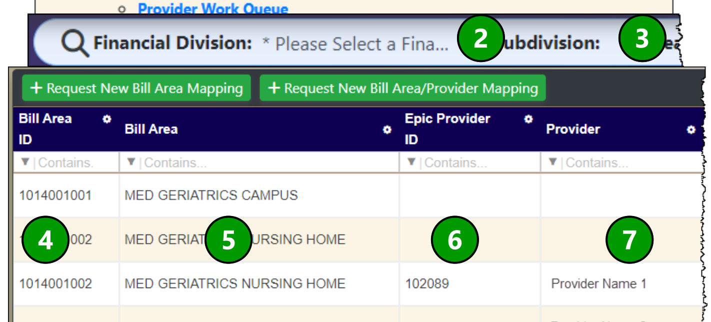
Results display:

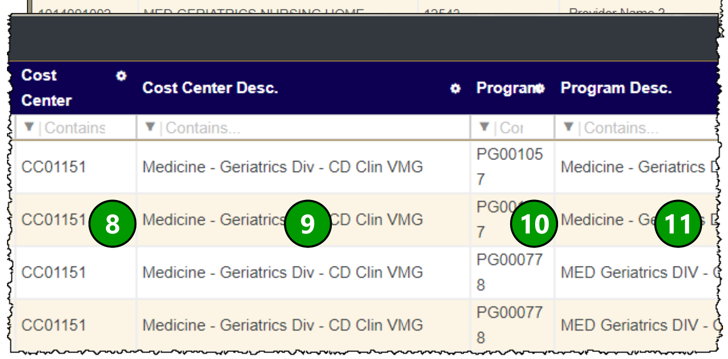
4. Bill Area ID from eStar.
5. eStar Bill Area description.
6. Epic Provider ID from eStar.
7. Provider Name.
8. Workday Cost Center number.
9. Workday Cost Center description.
10. Workday Program ID.
11. Workday Program description.

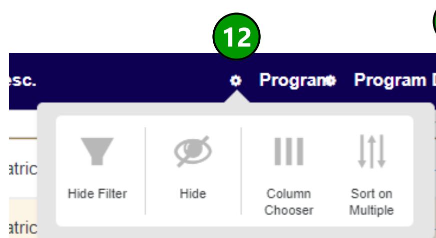
If only Bill Area is displayed, revenue is currently mapped based upon the Bill Area (for all Providers). If both Bill Area and Provider fields are populated, revenue is currently mapped based upon the Bill Area/Provider combination. Note there can be Provider level exceptions to a Bill Area based mapping if the revenue for one or more providers needs to map differently than the primary mapping for the Bill Area.

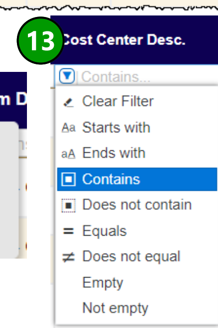
12. Use the gear icon at the top of any column to apply column filters.
13. Use the Filter option at the top of each column to further filter results.



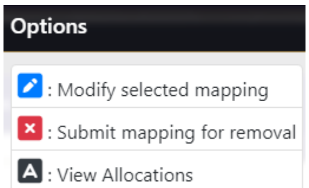



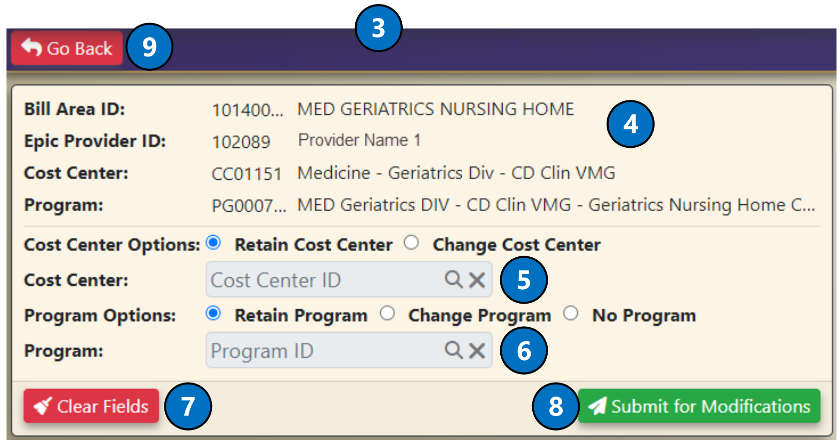
# Mapping & Allocation Changes - Continued

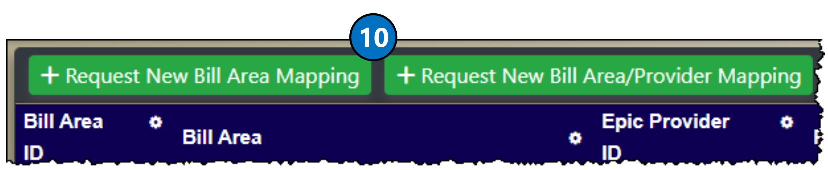
## Edit Revenue Mapping

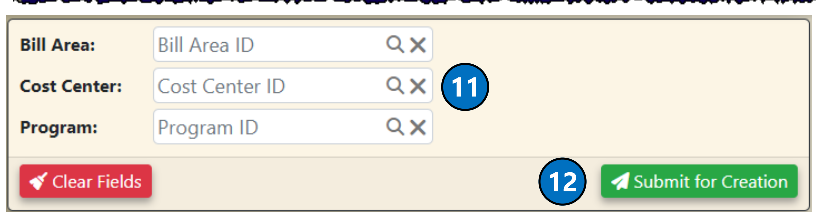
1. Use the icons in the last column of the mapping displayed to edit the current mapping.

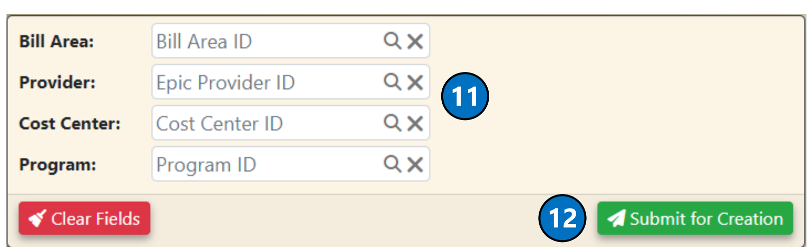



2. Click the **Pencil Icon** to edit the current mapping.
3. The **Modify Selected Mapping(s)** window displays.
4. The current mapping displays at the top of the window.
5. Select **Change Cost Center** and enter the new Cost Center ID to change the Cost Center Mapping.
6. Select **Change Program** and enter the new Program ID or select **No Program** to change the program mapping.
7. Click **Clear Fields** to reset any changes before submitting.
8. Click **Submit for Modifications** to submit your changes.
9. Click **Go Back** to exit the modification window without saving your changes.
10. To request mapping for a new bill area not currently mapped, click **+ Request New Bill Area Mapping** or **+ Request New Bill Area/ Provider Mapping**.
11. Enter the appropriate mapping information.
12. Click **Submit for Creation.**

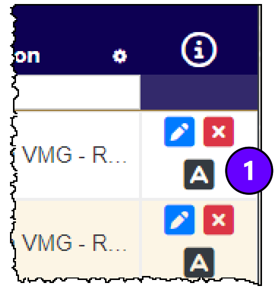




***Note** that the difference between the two options in step **10** is the Epic Provider ID. Select the option that relates to the mapping you are requesting. If the current bill area revenue mapping is consistent with the mapping needed for a new provider, no change is required. Bill area/provider combination mappings are only needed in exception situations where the revenue needs to map differently than the primary mapping for the Bill Area.*

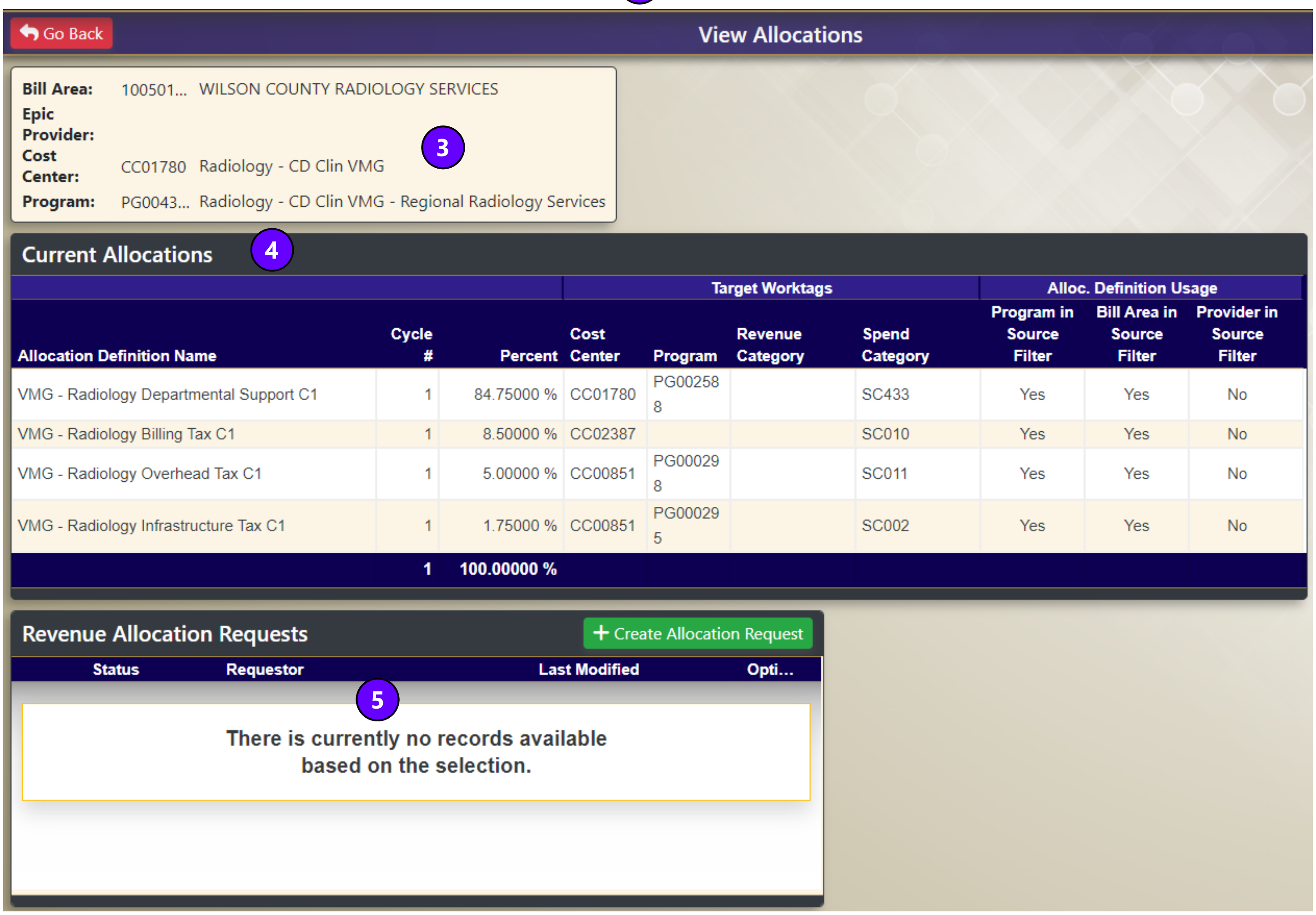
# Mapping & Allocation Changes - Continued

### View Current Allocations

1. In the last column of the current mapping, click **A** to view the current allocation.
2. The **View Allocation(s)** page displays.




2

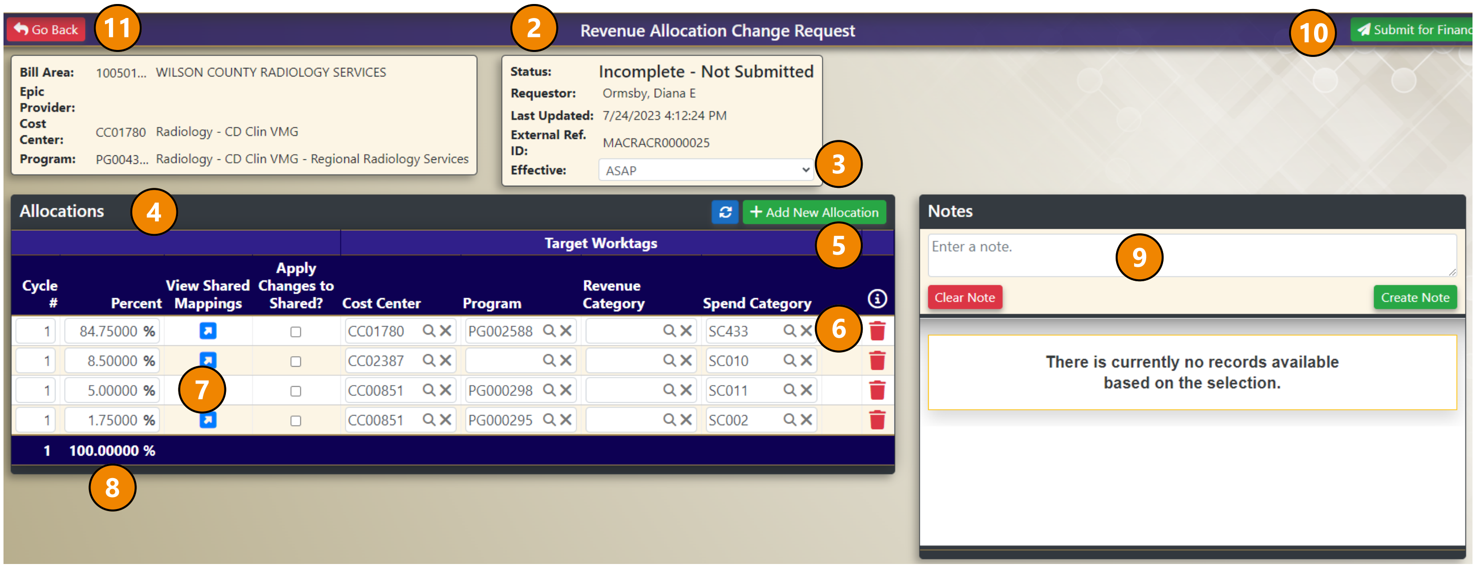



3. The Mapping selected displays.
4. Details of the **Current Allocation(s)** displays including cycle #, percentage allocated, cost center number, program id, revenue and spend categories.
5. Details of any previously submitted requests or changes will display.

# Mapping & Allocation Changes - Continued

## Change Allocations

1. From the View Allocations window (see page 3 above), click **+Create Allocation Request.**
2. The **Revenue Allocation Change Request** window opens, displaying the details of the mapping selected.


3. The status information for your requested change displays including the current status, requestor, date, and reference. Select an effective date. Options are ASAP, Next Fiscal Year, or a specific date can be entered.
4. The current allocation information displays. Make changes as needed.
5. Click **+Add New Allocation** to add an additional allocation.
6. Click the **Delete** icon to delete a line from the allocation.
7. Click to view the Shared Mappings that currently exist.
8. The total percentage calculates.
9. Add Notes in the **Notes** window and click **Create Note** to save.
10. Once completed, click **Submit for Finance Review** at the top of the page.
11. To exit without saving or submitting, click **Go Back.**

# Mapping & Allocation Changes - Continued

## Work Queues

There are four (4) work queues available for review:

**Bill Area Work Queue:** Displays bill areas labeled as “active” in Epic that are not currently mapped. Note this is for all areas EXCEPT Anesthesiology.

**Pre-Suspense Work Queue:** Display areas that are not yet mapped in Workday with charges, collections, or AR balances that are not currently mapped.

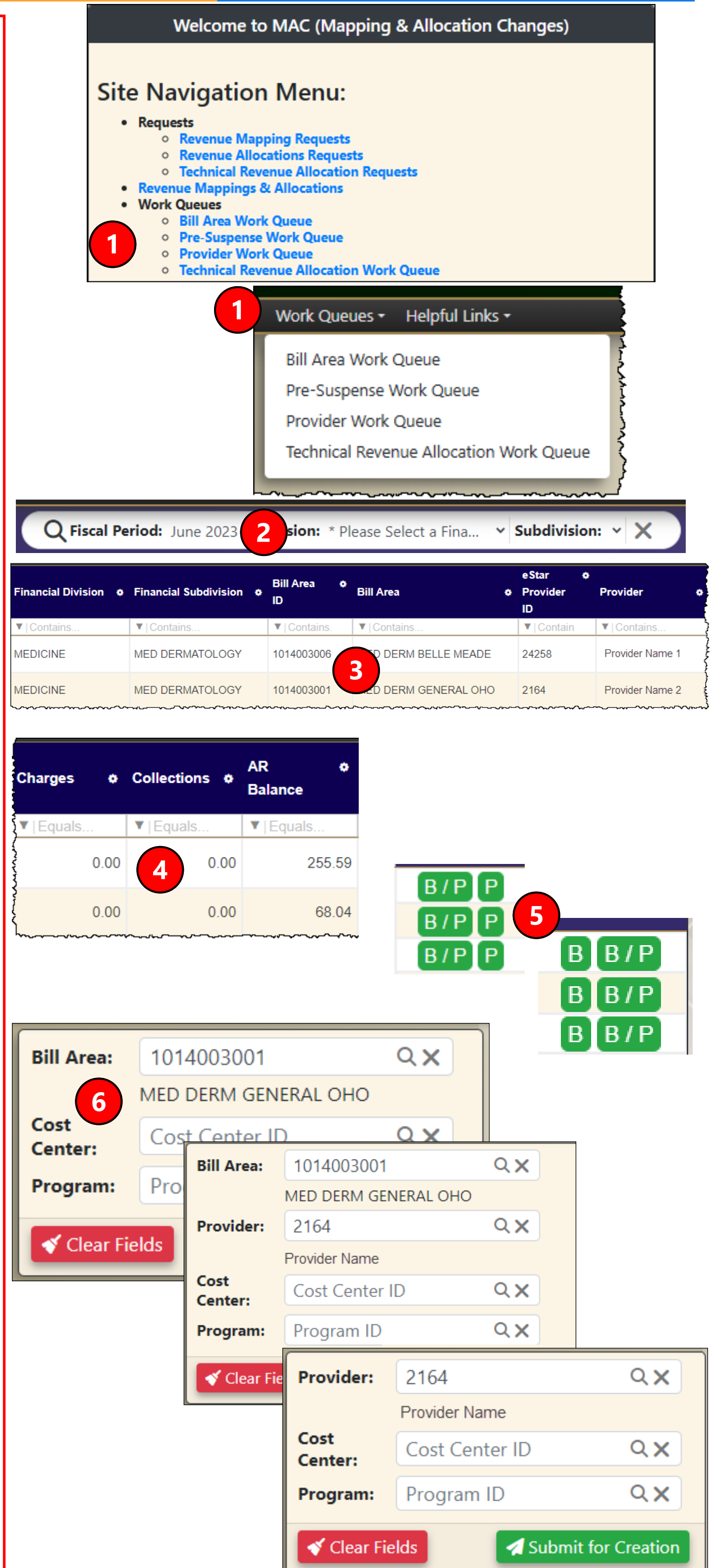
**Provider Work Queue:** Only for Anesthesiology.

**Technical Revenue Allocation Work Queue:** Displays bill areas with technical revenue that need an allocation set up.

1. From the log-in screen, select the appropriate **Work Queue** or, if you are already logged in, you can select the **Work Queue** at the top of the page.
2. Use the **Search Bar** at the top to select parameters such as **Fiscal Period** *(pre-suspense only)*, **Division**, and **Subdivision** (optional).
3. Depending on your selection, information for the PB Revenue from eStar displays including the Bill Area and Provider information, if available.
4. Additional information such as **Charges** and **Collections** that have not yet been mapped will also display.
5. Use the last column to create mapping for the data by clicking one of the options. Note the options vary based on the work queue selected.

| Options |
|---|
| B : New Bill Area Mapping |
| B / P : New Bill Area / Provider Mapping |
| P : New Provider Mapping |

6. Complete the **Create Mapping** information based on your selection and click **Submit for Creation** when completed. (see page 2 for more details).






QUESTIONS?
Please email BusinessEducation@vumc.org.