

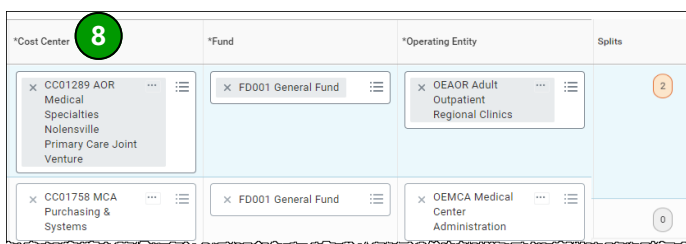
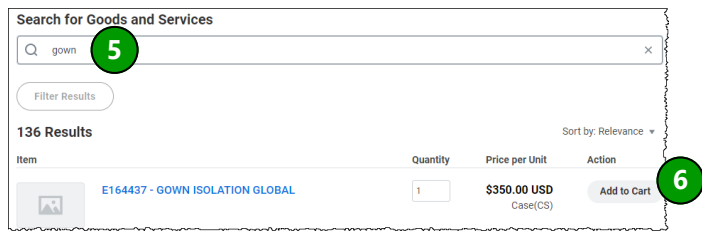
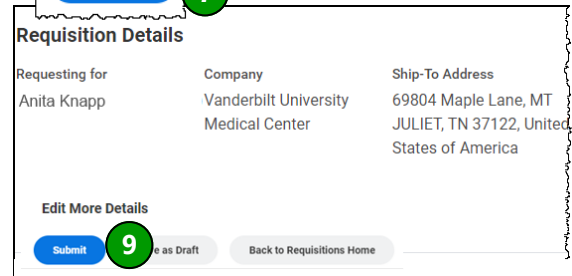
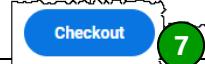
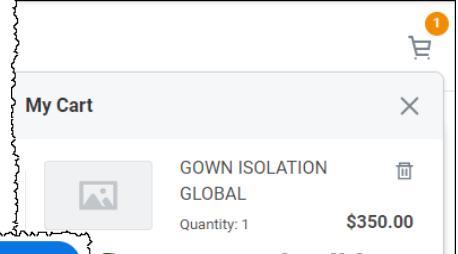
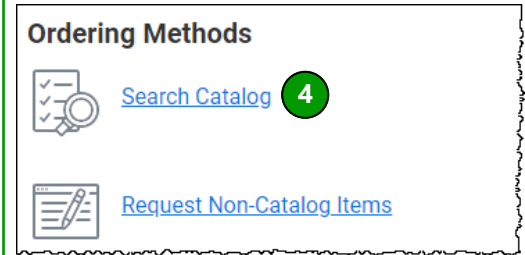
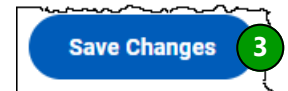
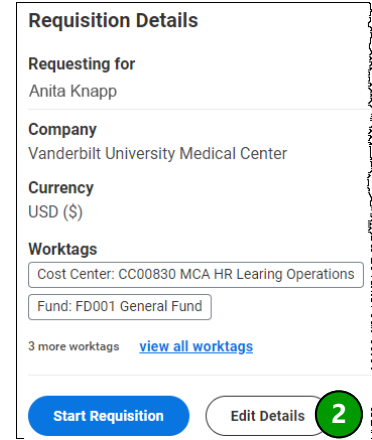
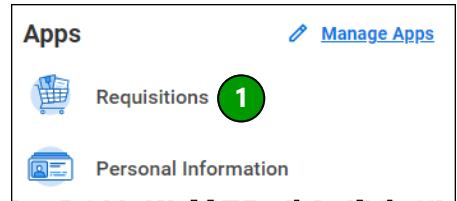


## Request Materials and Services (Clinical)

In Workday, requisitions can be created by any employee at VUMC to initiate the purchase of clinical items. There are four different Ordering Methods available to choose from. Follow the steps below to create a catalog requisition (purchased item included in the standard catalog of items in Workday, or, frequently ordered items).

### CREATE CATALOG REQUISITION

- From your **Apps**, select the **Requisitions** application (or type “create requisition” into the Search box).
  - In the **Requisition Details** card, select the **Edit Details** button.
- Note:** From **Requisition Details**, you can edit details such as company (VUC, VHP, or VPS), requisition type, deliver-to address, and currency. Use this [guide](#) to view the ‘VUMC SCM Extract Locations Report’ if you are receiving location errors.
- After you have entered the requisition details, select **Save Changes** to save details for future requisitions.
  - In the **Ordering Methods** card, select **Search Catalog**.
  - Search for items using the **Search box**. Change the item **Quantity** if needed.
  - Select **Add to Cart**. The **My Cart** pop-up will appear in the upper-right corner under the **View Cart** icon.
  - Select **Checkout**.
  - Review** the requisition information to confirm all details are accurate including the Cost Center and any splits.
- Note:** Questionnaire for more documentation will be triggered if Bear Claw requirements are met on purchases for federal projects.
- Select **Submit**. Your requisition is now in the approval process.





## Request Materials and Services (Clinical) - Page 2

In Workday, requisitions can be created by any employee at VUMC to initiate the purchase of clinical items. Clinical requisitions can only be created for items that are on the VUMC Item Master. There are four different Ordering Methods available to choose from. Items that are frequently requested can be marked as a 'Favorite' in Workday to facilitate the requisitioning process. Follow the steps below to add an item to favorites and complete ordering method, create requisition from favorites.

### ADD AN ITEM TO FAVORITES

From the **Requisitions** application:

1. In the **Ordering Methods** card, select **Search Catalog**.
2. Search for an item using the **Search box**.
3. **Select the item** you wish to add to your **Favorites**.
4. From the pop-up window, select **View Item Details**.
5. Select the **Related Actions** icon to the right of the item name.
6. In the **Favorites** tab, select **Add**.
7. Select **OK**. Your item can now be found in **Select from My Procurement Favorites** in the Ordering Methods card.

### Ordering Methods



[Search Catalog](#) 1



[Request Non-Catalog Items](#)

Search for Goods and Services

gown 2

Filter Results

136 Results Sort by: Relevance

Item	Quantity	Price per Unit	Action
E164437 - GOWN ISOLATION GLOBAL 3	1	\$350.00 USD Case(CS)	Add to Cart

E164437 - GOWN ISOLATION GLO...  
\$350.00 USD  
GOWN ISOLATION GLOBAL

Unit of Measure Case(CS)  
Item Identifier E164437

[View Item Details](#) 4

E164437 - GOWN ISOLATION GLOBAL 5

Item Name	GOWN ISOLATION GLOBAL
Item Identifier	E164437

Actions

- Purchase Item >
- Favorite**

Pure E164

Add 6

OK 7 Cancel

### CREATE REQUISITION FROM FAVORITES

From the **Requisitions** application:

1. In the **Ordering Methods** card, click **Select from My Procurement Favorites**.
  2. Select from allowed **favorites** based on cart settings.
- Note:** If you have no items, select a step from the **Continue Shopping** button or select the **View Cart** icon.
3. Select **Add to Cart** and continue to Checkout.



[Add from Templates and Requisitions](#)



[Select from My Procurement Favorites](#) 1

Add	Image	Item	Item Description
<input checked="" type="checkbox"/> 2		E151480 - GOWN EP ISOLATION	GOWN EP ISOLATION

Add to Cart 3 Continue Shopping Cancel



## Request Materials and Services (Clinical) - Page 3

In Workday, requisitions can be created by any employee at VUMC to initiate the purchase of clinical items. Clinical requisitions can only be created for items that are on the VUMC Item Master. Requisition Templates have been created to facilitate the requisitioning process for Clinical supplies. Follow the steps below to create a requisition from a template.

### CREATE A REQUISITION FROM A TEMPLATE

From the **Requisitions** application:

1. In the **Ordering Methods** card, select **Add from Templates and Requisitions**.
2. Enter **USD** for the **Requisition Currency**.
3. Choose from the available **Requisition Templates** to copy.
4. Select **View Items**.
5. Edit the **Quantity** of each item you would like to select from the template.
6. Once all desired items have been chosen and quantities updated, select **Add to Cart**.
7. **Review** the requisition information to confirm all details are accurate including the Cost Center and any splits.
8. Select **Submit**.

Requisition Templates 4 items

Select	Name	Owned By
<input type="checkbox"/>	TEMPLATE1	Walter Mellon
<input type="checkbox"/>	TEMPLATE2	Tina See

Goods Lines 2 items

Select	Quantity	Unit of Measure	Item	Item Description	Unit Cost	Extended Amount	Supplier
<input checked="" type="checkbox"/>	20		Item2		25.00	500.00	DEPUY SYNTHES SALES INC/DEPUY SYNTHES JOINT RECONSTRUCTION

*Cost Center	*Fund	*Operating Entity	Splits
<input checked="" type="checkbox"/> CC01289 AOR Medical Specialties Nolensville Primary Care Joint Venture	<input checked="" type="checkbox"/> FD001 General Fund	<input checked="" type="checkbox"/> OEAOR Adult Outpatient Regional Clinics	2
<input checked="" type="checkbox"/> CC01758 MCA Purchasing & Systems	<input checked="" type="checkbox"/> FD001 General Fund	<input checked="" type="checkbox"/> OEMCA Medical Center Administration	0



## Request Materials and Services (Clinical) - Page 4

Requisitions can be created in Workday to initiate the purchase of clinical items. Clinical requisitions can only be created for items that are on the VUMC Item Master. See below for approval amounts by level and requisition types.

### APPROVAL AMOUNTS BY LEVEL

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				Regional Hospital			
	Current Approval Levels		Workday Approval Levels		Current Approval Levels		Workday 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	*as needed	
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

### REQUISITION TYPES

- Blanket Order** - Used when a business needs the same goods/services on a recurring basis over a specified period, such as an entire year.
- Bulk Buy** - Buyer obtains large quantities at lower cost to leverage economies of scale.
- Capital** - Capital purchases; used to make a substantial investment in long-term fixed assets. This can include purchasing machinery and equipment; land, buildings, or other infrastructure; furniture and fixtures; and software. Requests for capital must first be entered and approved within Capital Planning, where a Capital Request ID will be issued. This Capital Request ID is required for capital requisitions, in addition to a Trackable Spend Category, a Project ID, and a Location ID.
- Equipment Rental** - Tends to be shorter term rentals. An example would be hospital beds.
- Purchased Services** - Used for a variety of services. Service purchase orders are by amount only and typically configured for 2-way match. Includes consulting and service maintenance agreements.
- Supplies** - All supplies and general purchases.
- TMS Facilities** - Used for the TMS facility purchases that require a work order number.

### QUESTIONS?

Please email [BusinessEducation@vumc.org](mailto:BusinessEducation@vumc.org).