



## Change Network Meeting: October

October 26, 2022

# Change Network Agenda

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- Supply Chain: Purchase Reqs & POs, Payment Cards, and Check Requests
- Diana's Demos
- HR Data Stabilization Process Begins
- Shared Experience: Notifications
- Tecsys Update
- Leader-led Actions
- Q&A

# FY24 Budget

# Budgeting Update

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- FY24 budgets will be created using our current tools (eBudget, Budget Forecast Tool)
- Training for FY24 will be offered beginning in January
- Workday Adaptive Planning, summer 2023
- FY24 Q1 Forecast (centrally)



# A bit more on Purchase Orders...

# Workday Purchase Requisitions: Think ahead strategically

*Workday Purchase Requisitions should be created to align with the invoice that will be matched to the Purchase Order. If not created correctly, POs will be closed prematurely or may require manual closure.*

If purchasing 3 items for your computer setup....

Quantity	Description	Cost per item	Total Cost
1	Computer Set	\$300	\$300



If the supplier sends and invoices one item (before the other 2 items), the PO will close out because the quantity (1) has been met.

This PO would remain open until all items are received.

the Requisition should be created like this:

Quantity	Description	Cost per item	Total Cost
3	Computer equipment	\$100	\$300

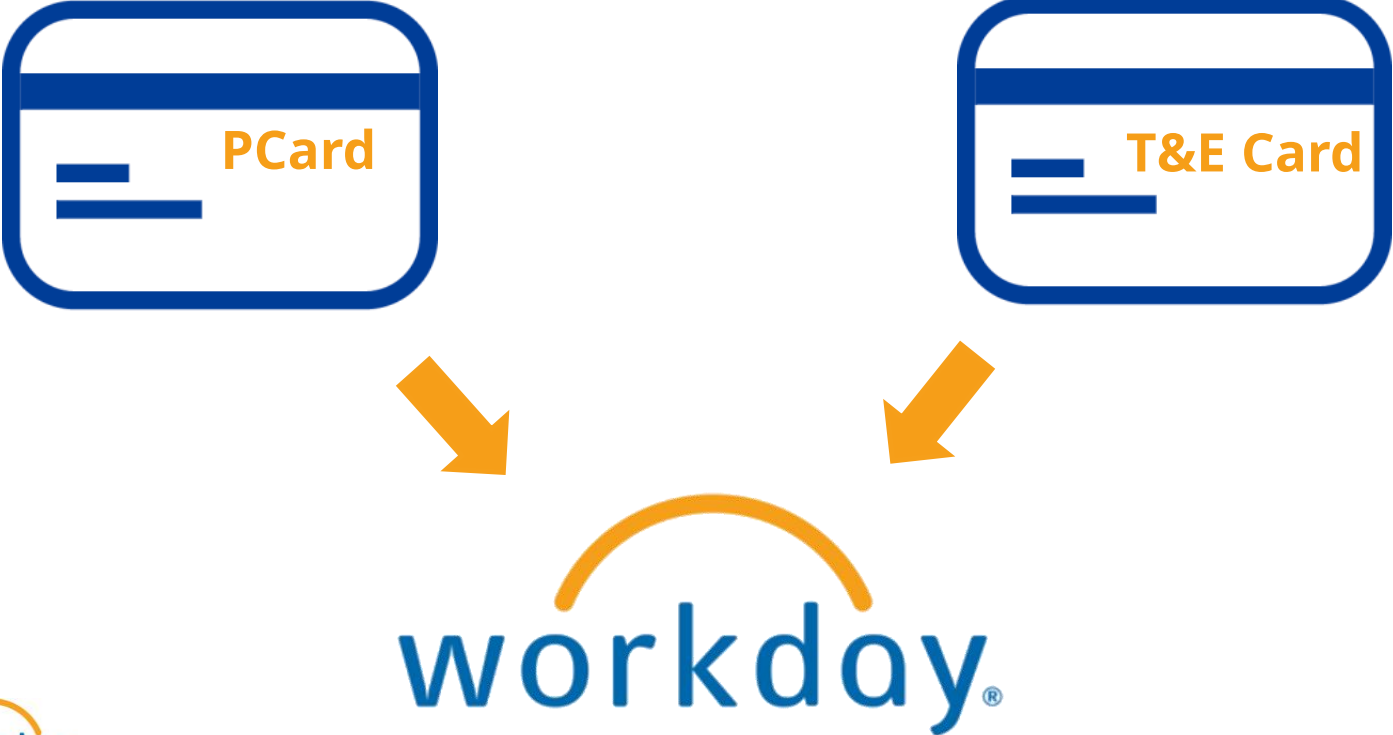


# Payment Cards

# Payment Cards: Post Go-Live

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Post go-live, all VUMC payment cards will be processed within Workday.





# Payment Cards: Key Changes

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- Cardholders and their managers will review and approve charges within the Workday Expense Report module
- Payment card transaction review and approval is part of the HR Supervisory Organization manager role in Workday
- Workday HR Manager will review and approve transactions for any payment cardholders who report to them directly



# Payment Cards: Key Changes

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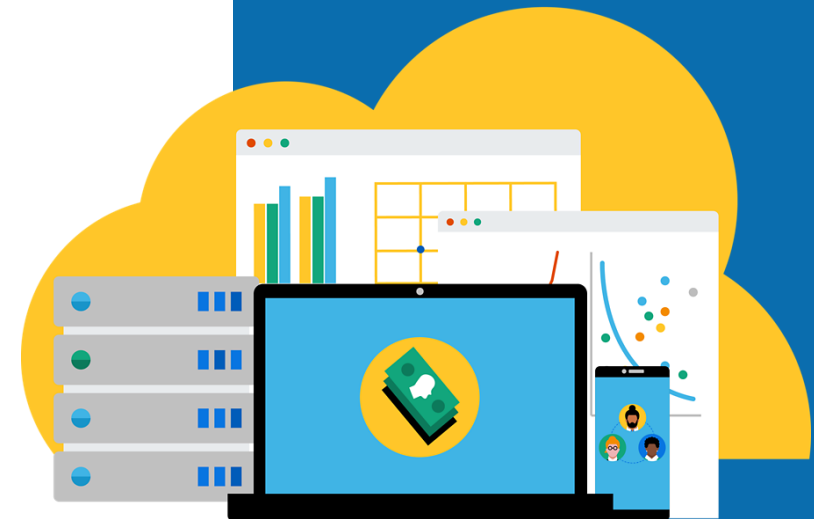
- All purchases made with a VUMC payment card will be listed within the Expense Report module as Credit Card Transactions, usually within three (3) business days
- Cardholders will be required to submit all card charges monthly, uploading receipts as necessary per policy
- Electronic approvals and receipts within Workday will replace current-state 'PCard Binders'



# Payment Cards: Workflow

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- Expense report transactions will be routed automatically in Workday, based on the attributes of each expense
- After HR Manager approval, payment card transactions will be routed as applicable to a Cost Center Manager, Grant Manager, or for any additional approvals such as dollar amount
- This approval functionality means that with Workday, payment cards will be an approved form of payment for grant purchases after Workday go-live



# Check Requests

# “Check Requests” in Workday

**Supplier Invoice Requests** in Workday will be taking the place of check requests.



**VANDERBILT UNIVERSITY** Check Request No. \_\_\_\_\_  
MEDICAL CENTER

Is this payment to or  half of a U.S. Citizen or Permanent Resident? Yes  No

**Shaded Areas are for Accounting Use Only**

Vendor # \_\_\_\_\_  
1099 Amount \$ \_\_\_\_\_ Code \_\_\_\_\_  
Srt Cd \_\_\_\_\_ Clk Desc # \_\_\_\_\_ Sep Clk \_\_\_\_\_

Vendor  Employee  Student

Required Tax I.D./SS or Employee/Student ID# \_\_\_\_\_  
Invoice # \_\_\_\_\_  
Invoice Date \_\_\_\_\_  
Description on Check stub (if required) \_\_\_\_\_

Payee (Maximum of 21 characters) P-Inv (P) (S) (C) (A) \_\_\_\_\_  
Mailing Address (Max. 4 lines of 21 characters) \_\_\_\_\_  
City/State \_\_\_\_\_  
Zip/Postal Code \_\_\_\_\_ Country \_\_\_\_\_  
Payee Phone No. (Maximum of 20 characters) \_\_\_\_\_

**Business Purpose (Required)**  
(Will not appear on check stub. Attach separate sheet if additional space is needed.)

Account (6 digits)	Center (10 digits)	Sub-ledger (if required) ID	Account (6 digits)	Amount
				\$ -
				\$ -
				\$ -

Total Amount Requested \$ -

Payment Method (mark only one)  
 Electronic Funds Transfer  
 Direct Deposit (ACH – to USA banks only)  
 Foreign Wire (Int'l. Vendors only)

Additional Instructions \_\_\_\_\_  
\_\_\_\_\_

Mail to address shown above  
 Remittance attached

The "Requested by" and "Approved by" signatures indicate:  
(1) you have reviewed the expenditure, business reason, and documentation for appropriateness/compliance with VUMC policies and  
(2) payment has not been requested or paid through any other VUMC payment process, such as the procurement card or accounts payable, or through any non-VUMC entity.  
The "Approved by" signature also certifies as the appropriate authority to approve this expenditure on the accounts and centers listed.

Requested by:	Signature	Date	Phone #
_____	_____	_____	_____
Approved by:	_____	_____	_____
Approved by:	_____	_____	_____
Accounting Use Only	Restricted, Department of Finance or Disbursements Approval	_____	Date _____

White Copy - VUMC DISBURSEMENT SERVICES OR DEPT. OF FINANCE Yellow Copy - DEPARTMENT



Supplier Invoice Requests

## Check Request Form

# When to use **Supplier Invoice Requests**

*Most goods and services should be purchased from VUMC approved suppliers using a Purchase Requisition/Purchase Order in Workday or via a payment card.*

## **Workday Supplier Invoice Requests should be used for\*:**

- 3rd Party Clinical Services (Imaging, Testing, Dialysis)
- Advertising Costs (Non-Agency Contracts)
- Contributions/Donations/Sponsorships Insurance
- Insurance & Patient Refunds
- If payment is direct to an organization:
  - Prof'l Licensure/Registry/Certification/Memberships/Training
  - Registration Fees
- Risk Management
- Royalties
- Settlements/Attorneys/Legal Services
- Subscriptions/Books
- Taxes

\* This list is for example purposes only and will evolve as we further prepare for Workday go-live.



# **Performance Central and HR Data Stabilization Update**

# Download Your Team's Historical Annual Evaluations

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Performance Central will no longer be accessible after **November 30, 2022.**

- The last 3 years of evaluation rating data will be brought into Workday
- After November, full details of historic annual evaluations will be accessible only by HR for audit and regulatory purposes
- Download PDF copies of your team members' historical annual evaluations from Performance Central **before November 30** (for full details)





# Critical



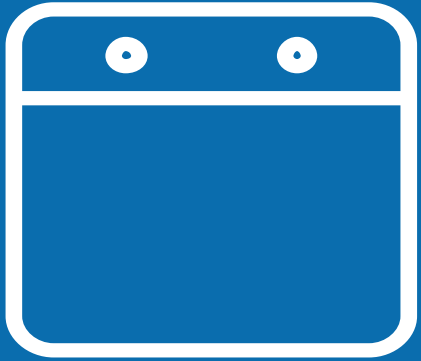
## HR Data Stabilization Process Begins...

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- November 2022: Annual Increase process preparations begin
- February 2023: Workday final snapshot for go-live environment following annual increases
- **Change Impacts**
  - ✓ Requires manual entry in multiple systems
  - ✓ Duplication of Effort
  - ✓ Risk that systems will not be in sync
- **Continued changes pose significant risk to**
  - ✓ Workday implementation April 2023
  - ✓ Paying employees correctly in Workday



# Before...



## HR Data: Workday Preparation Freeze & Annual Increase Processing

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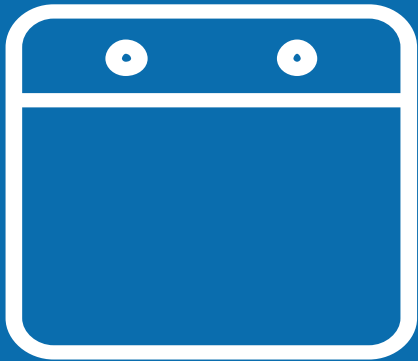
- **By November 1, 2022:** All job code requests to be submitted to Compensation
  - ✓ New job codes requests including job descriptions
  - ✓ Existing job code edits, and restructures
- Complete all job changes/reclassification for employees this month (October)
  - ✓ **By November 7:** Submit non-exempt job changes via ePAC with an *October 23<sup>rd</sup>* effective date
  - ✓ **By November 9:** Submit exempt job changes with a *November 1<sup>st</sup>* effective date or earlier



# Job Code Requests after November 1st...

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After...



- Work with your HR Business Partner
- Job code requests (new or modifications) after November 1<sup>st</sup> will be considered as rare exceptions and require the approval of:
  - ✓ Service Delivery Director,
  - ✓ in coordination with the entity leader, and
  - ✓ The Chief Human Resources Officer
- Requests for job changes/reclassification that are placed on hold during transition will be
  - ✓ tracked by Compensation (in the Job Code Request Smartsheet)
  - ✓ reviewed following the Workday go live
  - ✓ processed in Workday after a period of stabilization

# Shared Experience: Notifications

# Workday Notification Types

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There are three types of Workday-generated email notifications:

## Informational Notifications

Informational in nature; do not require the user to perform an action

## Action Alert Notifications

Generated when an action item appears for a user; requires the user to log into Workday to perform an action

## Overdue Reminders

Generated when an action item has passed its due date; reminds the user to log into Workday to perform the action



# VUMC Workday Notifications

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Default setting for email delivery of Workday notifications will be a **Daily Batch**  
*(Delivery time TBD)*



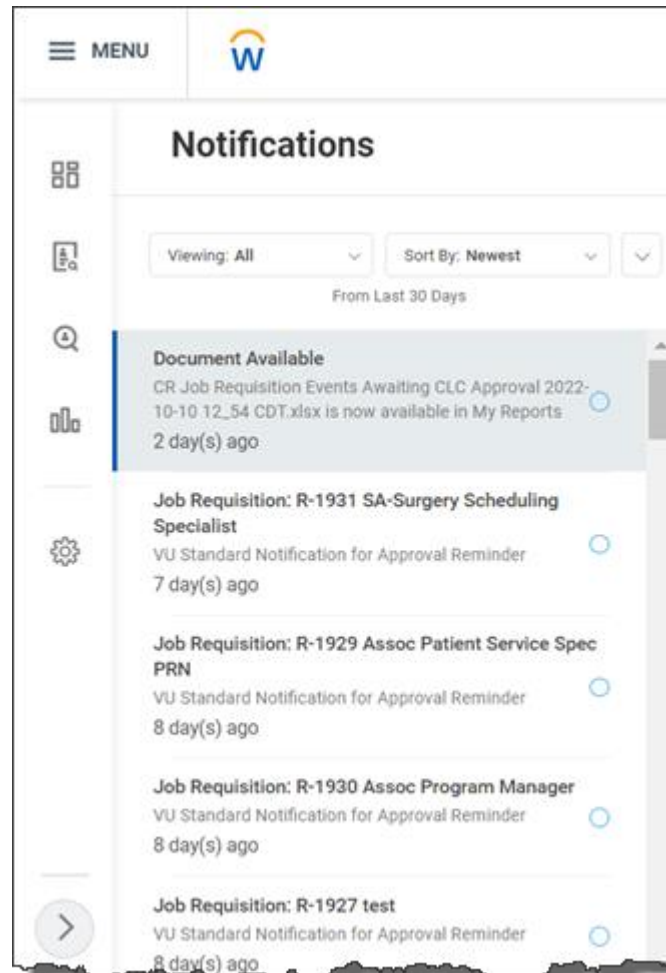
Users will be able to update preferences to **'Immediate'** for Action Items



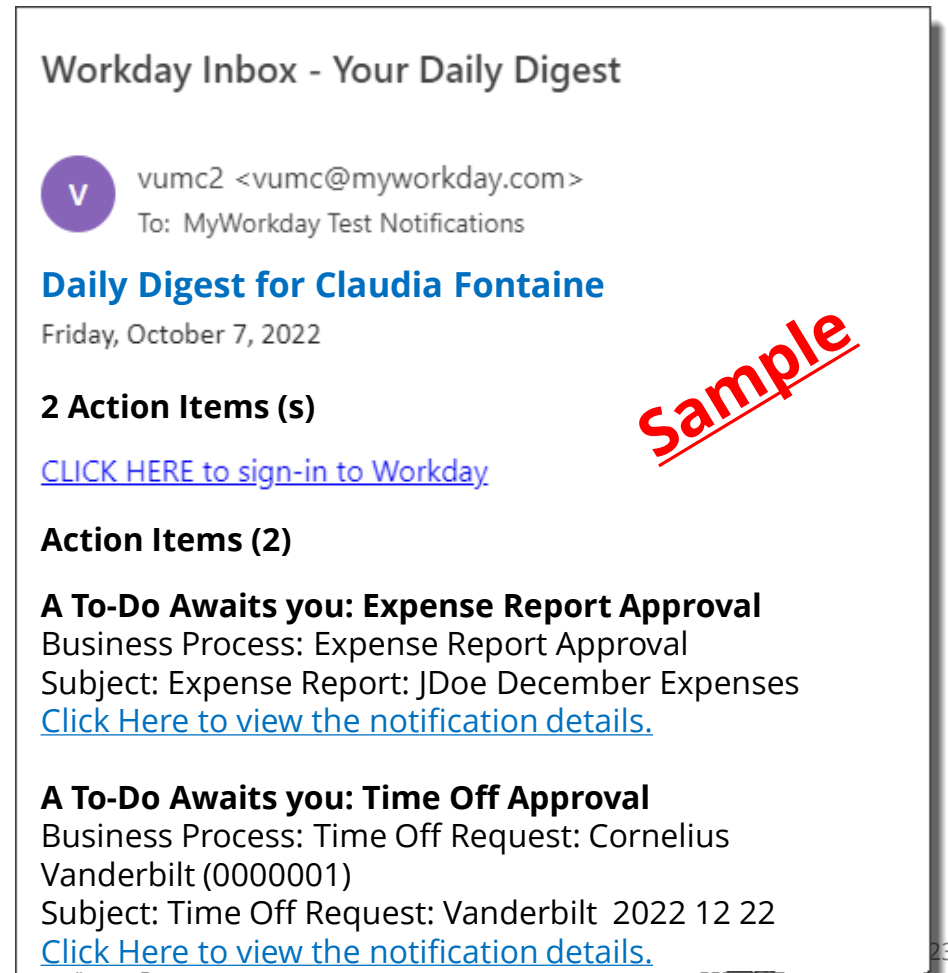
Users will be able to update preferences to **'Immediate'** or **'Mute'** for Informational Items

# Workday Notifications

## Workday Inbox (real time):



## Outlook email (Default, Daily Digest):



# Tecsys Update




# Tecsys Day-in-the-Life Testing (DIL)

- Testing to validate functionality supports a typical day of usage
- Performed by end-users (VUMC Tecsys Super Users/Testers) using actual business processes

## ❖ VUMC's DIL Schedule:

Date	Location	Participants
November 8, 2022	<b>Adult:</b> <i>Procedural Areas, OR, IP &amp; Supply Chain</i> <b>Children's:</b> <i>Procedural Areas</i>	Super Users/Testers by Clinical Leaders
January 10, 2023	<b>Wilson County:</b> <i>Procedural Areas, OR, IP &amp; Supply Chain</i>	Super Users/Testers by Clinical Leaders
February 7, 2023	<b>VTHH &amp; VBCH:</b> <i>Procedural Areas, OR, IP, &amp; Supply Chain</i>	At-the-Elbow (ATE) support

# At-The-Elbow Support

At-the-Elbow Support 

Areas affected by the Tecsys implementation will have designated At-the-Elbow Support who will act as system experts and provide peer-to-peer support.

Please update this list for your local At-the-Elbow Support:

[At-The-Elbow Support List \(Excel\)](#)

Description	eStar Nursing Doc Support Needed	Room(s)	Cost Center	Configuration							Notes	Super User	Super User 2	Super User 3
				Count	RFID Two-Bin Kanban	Parcode Tracked Item	Tray	Case Chart Management	UI	Sk				
VUAH1 PROC GI	Yes	1739	2011770000							X				
VUAH1 PROC GI	Yes	1409;1410;1414;1419;1412;1415;1421	2011770000							X				
VUAH1 PROC GI	Yes	1215	2011770000							X				
VUAH1 PROC GI	Yes	1128;1129	2011770000							X				
VUH GI ENDOSCOPY SERVICES TRACKED ITEMS	No		2011770000			X	X			X				
VUAH3 OR PERFUSION	Yes	3635	2011800000	X						X				
VUAH4 OR	Yes		2011880000	X	X	X		X	X	X				
MCE3 OR	Yes	3023	2012250000	X	X	X		X	X	X				
VUAH1 PROC CATH-CRMI	Yes	1764	2014790000	X	X	X				X				
VUAH5T PROC CATH	Yes	5601;CCL1-5	2014830000	X						X	X			
VUAH5T PROC CATH	Yes	5620;VCCOC;EP1-4	2014840000		X	X				X				
VUAH1 PROC RADIOLOGY	Yes	1031;1096	2014910000											
VUAH1 PROC RADIOLOGY	Yes	1140;1142	2014910000											
VUAH1 PROC RADIOLOGY	Yes	1003C;1096	2014920000							X				
VUAH1 PROC RADIOLOGY	Yes	909	2014940000											
VUAH1 PROC RADIOLOGY	Yes	1258	2014950000	X						X				
VUAH1 PROC RADIOLOGY	Yes	1009;1096	2014970000							X				

Note: Ensure all shifts are covered and please indicate

# Tissue Usage for External Clinics

Manual Case Creation and CDUI

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- **Clinics that receive their tissue from another VUMC location and store it, will have their tissue received in a POU hospital.**
  - Manual documentation (log) at clinic
  - Tecsys documentation by auditing team
  - Clinic will use Tecsys for Tissue Log Report when needed
  - These tissue storage locations may be physical (p) or virtual (v)
  - [These clinics include: Belcourt Oral \(v\), Bedford Wound Care \(p\), VOF Clinic \(v\), Tullahoma Wound Clinic \(v\)](#)
- **Clinics that receive their tissue from another VUMC location, but DO NOT store their tissue.**
  - Clinics will not use Tecsys
  - Any usage will be part of the main hospital inventory
  - [These clinics include: TVC3 - wound, MCE4, Vanderbilt Eye Institute](#)
- **Clinics that receive their own tissue will have access to Tecsys.**
  - [These clinics include: Brentwood & Hendersonville](#)

# Leader-led Actions



### October Change Network

- **Budgeting Update:** FY24 budget created in current tools.
- **Payment Cards:** PCards and T&E will be reviewed and approved in Workday. The HR manager role will process transactions for the cardholder.
- **Supplier Invoice Requests** in Workday will replace check request forms.
- **Shared Experience: Notifications:** Notifications generated from Workday are now defined. Informational, Action, and Overdue Reminders will be batched and sent daily to Outlook Inboxes.
- **Tecsys Go-Live: Aligned with testing:** The Day-in-the-Life testing plan is shared. Please continue tagging materials (Kanban has been installed) in your tracking in Tecsys for clinics waiting for testing.

### Meeting Materials Can Be Found in MyWorkday Change Network

- October 26th Meeting Recording
- Change Network Department Information
- Previous Leader-led Actions

Send questions to: [myworkday@vumc.org](mailto:myworkday@vumc.org)  
For more information visit [vumc.org](https://www.vumc.org)



## Leader-led Actions for October

- ❑ **Share the October Change Network Department Presentation** with your team
- ❑ **HR Data Stabilization:** Submit all job code requests to Compensation by 11/01. Complete all job changes/reclassification by 11/7 (non-exempt) and 11/9 (exempt).
- ❑ **Download PDF copies** of historical annual evaluations by 11/30 for full details.
- ❑ **Identify Tecsys At-the-Elbow** support by 11/6 ([At-the-Elbow Support](#))
- ❑ **Continue with Kanban static board procedures** in Kanban locations that have been rolled out (see resources <https://www.vumc.org/pou/training>).
- ❑ **PO cleanup continues:** Clean up purchase orders (POs) by closing older, inactive POs now to prepare for the transition to Workday. [PO Reference Guide](#) If you have a blanket PO, extend it.



Questions?

# Thank You