Infor Workforce Management (WFM) Advisory Meeting

Date:	10/16/2024	Next Meeting:	1/15/2025
Time:	09:00	Time:	09:00
Location:	Microsoft Teams	Location:	Microsoft Teams

Time	Item and Outcomes	Goal Alignment
9:00am	Introduction and Welcome	People
9:05am	Hot Fix 9/23/24 • Shift Trade Routing Issues • Schedule Compliance Error for >16 scheduled hours in 24-hour period and maximum 4 consecutive 12-hour shifts • Leave Request Issues for shifts less than or equal to 6 hours • Approved Leave Requests resulting in unassigned OFF shifts • Multi-Day Leave Requests with multiple balance types • Self-Scheduling weekend rule issue with last Saturday of scheduling period Upcoming Maintenance Downtime 11/4/2024 • No functional changes	Innovation
9:10am	LMS Integration • Employees can be enrolled in LMS classes as soon as their VUNet ID is claimed. Employees are not in WFM until their Start Date. If possible, please wait to enroll employees in LMS until after their Start Date to ensure their ISV and ISV-WK time is booked off correctly. • Other reasons that Inservice times do not book off are overlapping shifts, courses not set up in Learning Exchange correctly, job issues, and Multi Day LMS Courses. • WFM has created a LMS Error report for inservice times that did not book off through the integration. We add these inservice times manually each morning after the integration has completed. • Multi Day LMS Courses are not supported in WFM to automatically book off. We send out an email for these courses to remind employees and Educators that a leave request form will need to be submitted for the inservice time if it needs to appear on their schedule.	Innovation

9:15am	**Updated Skills Alerts based on Survey Feedback** • 108 responses to survey of inpatient Managers, CSLs/Assistant Managers, RSLs, and Educators. • The results were conclusive that the Expired Employee Compliance Items alert is not used by shift leaders when making assignments. There was also consensus in responses that RSL/Charge Nurses are not primarily responsible for facilitating renewals of competency items, like Point of Care. • Based on your feedback, **we have removed the Supervisor level access (this role is used in WFM for RSLs and Charge Nurses) from receiving the Expired Employee Compliance Items alert.** • Managers, CSLs/Assistant Managers, and Educators will continue to receive the alert. • **We have also updated the alert so that instead of Daily, it will be sent Weekly on Mondays.** • As a reminder, Workday is the source of truth for licensure (RN, LPN, etc) and certifications (BLS, ACLS, PALS, etc), so all reminders related to those items will come from Workday only. WFM alerts are specific to competency items, like Point of Care.	Innovation and Service
9:25am	**Self-Scheduling is evidence based** • An article was published recently that stated "self-scheduling practices are making a comeback" – they never left at VUMC! • Self-scheduling supports the principles of autonomy, flexibility, and transparency • Evidence shows that guardrails are helpful – reach out to WFM team if you need self-scheduling rules added or changed for your groups (minimum On Call rules, weekend requirements, etc) • Avoid traditional seniority structures that are dissatisfiers for new staff • Be strategic with holiday planning Reminder for all leaders: please don't check or uncheck Preferred Job or Home Team checkboxes on Employee Profiles. These are imported directly from Workday and should not be manually changed. We have previously advised that you could Swap a scheduled shift with a gold, unassigned shift when balancing the schedule, but have recently learned that this is not best practice. Swapped shifts remain linked in the background, so if you need to further change a shift that has been swapped, you are limited in what actions can be taken on that shift. Instead, we recommend that if you need to change an employee's days while balancing before publish, use the Unassign function to remove the employee from their scheduled shift and then Assign function to choose their new shift. **video attached to demonstrate a very easy way to Assign shifts on ASV!	Innovation
9:30am	Open Shift Management via Shift Billboard	Innovation

	• When open ended access is granted in an employee profile it can cause this employee to always show on your schedule on the ASV, even when not scheduled to your team. This can also cause publishing issues when final publishing your schedule, along with many other issues. • We can't grant admin access to a single employee, but instead access is granted by team. Scope of access is granted based on units that report to you and general access to sister units. • Shifts offered in the shift billboard can only be seen by the employee if they meet skill qualifications and are in compliance with their already scheduled shifts.	
9:40am	Known Issues/Open Infor Support Cases • Ghosted Shifts – data fixes and continuing root cause analysis • Users getting logged out mid session – limited reports, continuing investigation by technical team • Leave Requests for dates previously traded away	Service
9:45am	Upcoming for Ambulatory • Video: Outpatient Projections and Staffing Adjustments for Ambulatory Leaders was shared via email, attached to these minutes, and available on HELP website • Ambulatory review of Staffing Requirements, eStar department numbers, and schedules is underway • Presentation at Ambulatory NLB meeting on 11/1	Service
9:50am	Open question & answer	Service