Infor Workforce Management (WFM) Advisory Meeting

Date:	7/17/2024	Next Meeting:	10/16/2024
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	**WFM Downtimes** • Like Workday, eStar, and many of our other systems, WFM will now have downtimes. • Our system is more secure in the cloud and allows us to keep up with security patching and quarterly infrastructure maintenance • We will notify users via email and post an announcement on the WFM landing page of planned downtimes • We will avoid self-scheduling windows and shift changes when downtimes are necessary	Innovation
9:10am	**LMS Integration** • Employees can be enrolled in LMS courses as soon as their VUNet ID is claimed, but employees are not active 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 • WFM team has daily alerts to monitor LMS enrollment errors and make manual corrections as needed • Reminder that multi-day courses are not able to be booked off via the integration. Employees should enter a Leave Request for ISV time for multi-day courses	Innovation

9:15am	**POC Skills in WFM – updated process**
	• Point of Care competencies are tracked in WFM as Skills due to our ability to send automated reminder emails to staff and leaders
	• The Point of Care office now keeps record of historical competencies for employees
	    ○ If an employee transfers to a new department and a POC competency is no longer needed, they can email POCT@vumc.org to have it removed from their WFM employee profile and stop receiving the reminders
	    ○ Previous process was to update the End Date of a skill that was no longer needed to 01/01/3000 to stop the reminders – this is no longer needed
	
	Poll: Do you expect SLs to make assignments in consideration of expired skills? Example: POC glucose expired, avoid assigning to patient with glucose checks?
		Innovation and Service

Time	Content	Category

9:25am	**Default Shifts**
	There are now two types of "default shifts" in WFM
	1. Default Shift in Employee Basic Information – Override
	   a. Must be set to enter a Leave Request
	   b. Must be set for employees to book off automatically to HOL-PTO for teams marked Closed For Holidays
	2. Employee Default Shift in Employees > Employee
	   a. Allows the employee to utilize one-click Quick Select during self-scheduling
	   b. Can add multiple shifts or jobs, like Day Shift RN, Day Shift SL, and Day Shift OCN
		Innovation

9:30am	**Common Leave Requests Exceptions**
	• Employee requests Partial Dates that don't match their scheduled shift.
	   o Example: Request PNS 14:00-17:00 but their Scheduled Shift is 08:00-16:30
	   o Fix by: updating master rotation to reflect their actual shift times or update leave request to fall within scheduled shift
	• Employee requests a day that was already requested and approved
	   o Approvers, please click the Sched icon on the Leave Request form to see if the request has already been approved
	• Employee requests a day that another Book Off already exists, like ISV
	   o Approvers, please click the Sched icon on the Leave Request form to see if the request has already been approved
	• Employee enters Start Time and End Time on the request, but they're actually requesting the full day off
	   o The Leave Request form knows the employee's default shift, so they don't need to specify Start Time and End Time unless they are requesting a partial shift
	   o Entering Start Time and End Time for the full shift confuses the logic and may result in the incorrect number of hours deducted, as the Meal Break is also taken into consideration
	   o Approvers, please use Reject All – No First Off option and ask the employee to resubmit the request
		People

9:40am	**Known Issues/Open Infor Support Cases**
	• Shift Trades resulting in overtime not routing to approver
	• Shift Trades resulting in >four consecutive 12-hour shifts
	   o WFM team is monitoring Schedule Compliance Violations Report daily and notifying leaders when this occurs
	• WFM inbox is showing users they have more unread messages than they do
	   o Believed to be related to Leave Request Exceptions, Infor is investigating
	• Shifts visible on employee calendar and assignment sheet but not on ASV
	   o Infor Support believes this to be an upgrade related issue and not ongoing, but continuing to investigate and confirm
	• Leave Requests for 6-hour shifts are leaving 30min WRK on the schedule
		Service

| 9:50am | Open question & answer | Service |