

Wellstar Procurement Business Process Flow

Gold Business Processes

12/15/2023

Agenda

Topic

Our Why and Guiding Principles

Required Requisition Training

Requisition Business Process

Ordering Status Definitions

Approve, Send Back and Deny Options

PO's

Supplier Business Process

Key Dates

Closing Remarks

WorkWell Guiding Principles

Standardize and automate where possible

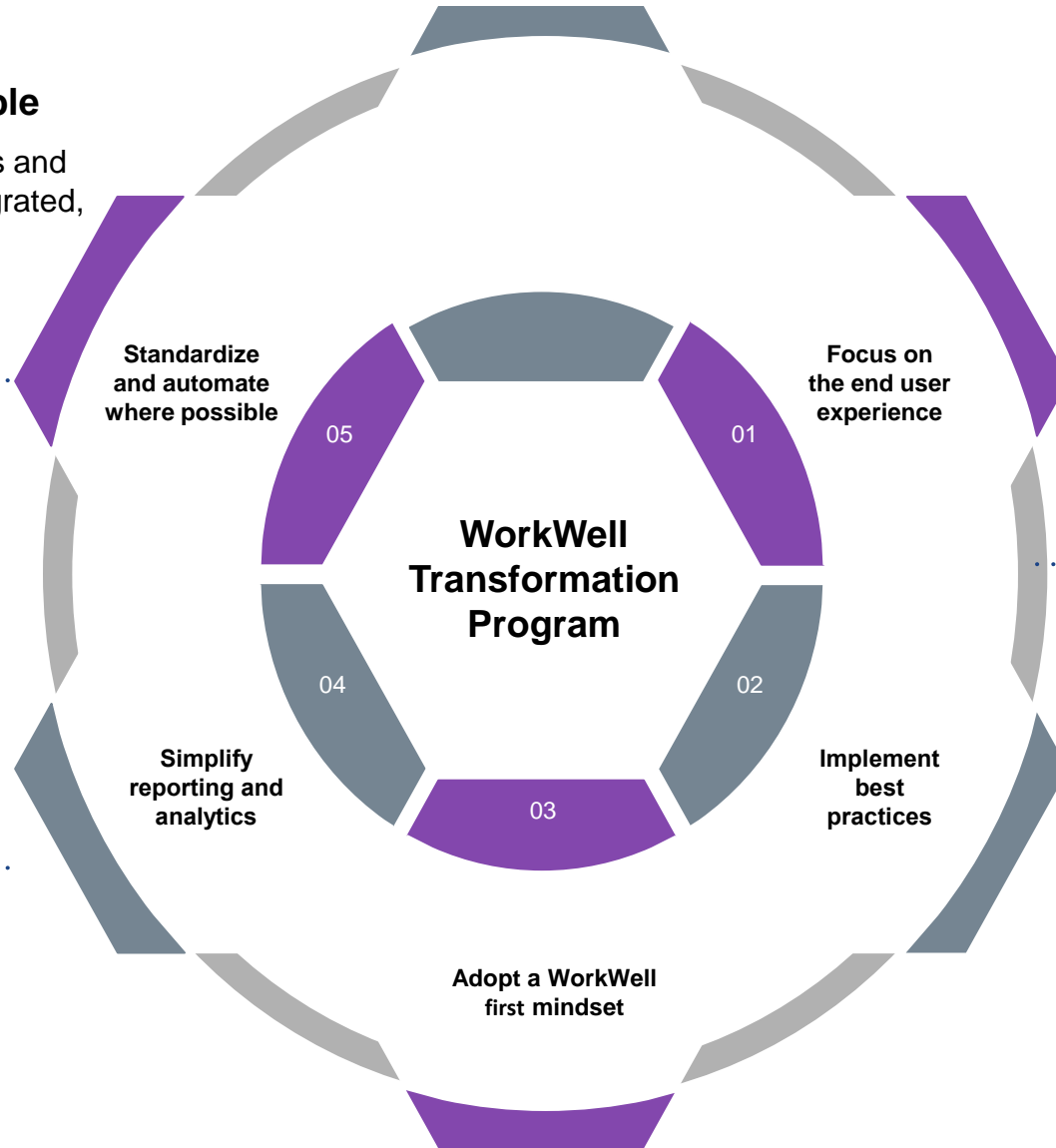
- Challenge current state processes, practices and policies to design a simplified, efficient, integrated, and scalable technology solution.
- Optimize for the whole of organization.

Simplify reporting and analytics

- Provide timely, real time, relevant, accurate information leveraging our strategic themes to be an ecosystem of care powered by a digital operating model.
- Simplify data to enable and deliver commanding analytics for enhanced reporting

Adopt a WorkWell first mindset

- Utilize the power of our partner's solutions where possible to maximize Manager and Employee satisfaction. The solution will be designed and built to support the vision and future state of Wellstar.



Focus on the end user experience

- Create a meaningful user experience to drive early adoption of WorkWell supporting technologies.
- Focus design with the end user in mind, emphasizing simplicity and intuitive use.
- Utilize mobile functionality to promote access anywhere and anytime.

Implement best practices

- Adopt proven best practices, whenever possible, to deploy an innovative digital solution that enhances, streamlines, and maximizes operational efficiency.
- Simplify processes and deliver cost efficient services to end users.

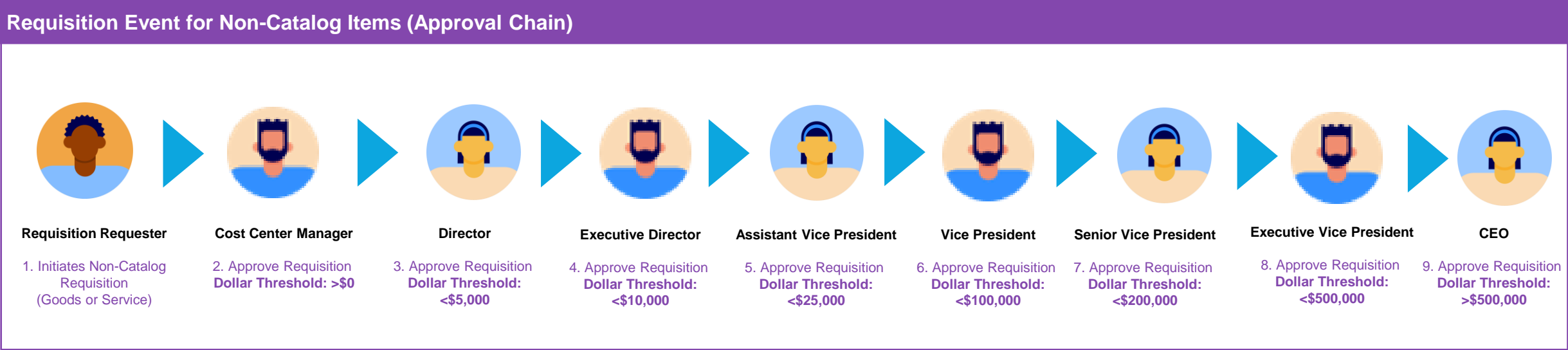
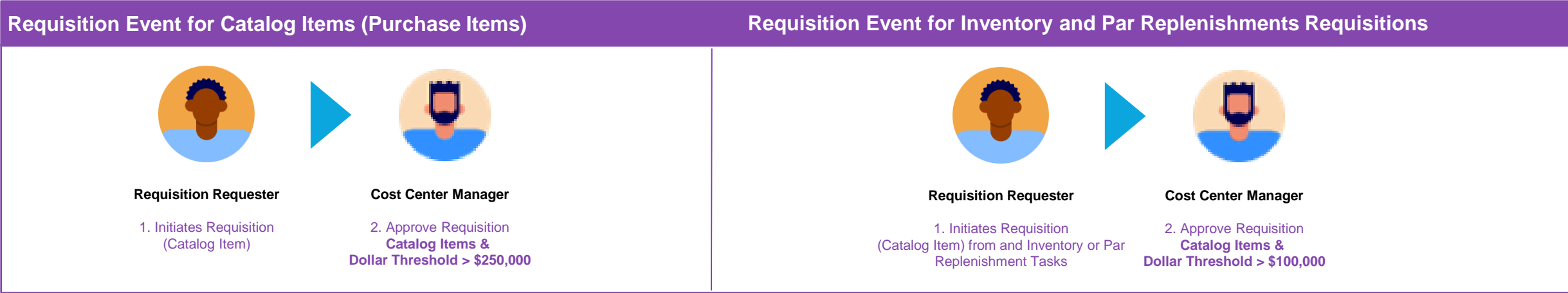
“

We're not just implementing a new system. We're *transforming* the way Wellstar does business.

”

Requisition Business Process

The process flow below illustrates the future Wellstar requisition business process in Workday for Gold. (Catalog and Non-Catalog)



Ordering Status

What Do the Statuses for Open Requisitions Mean?

Draft	Either the requisition was saved as draft, or the requisition failed a critical custom validation.
Awaiting Approval By	The requisition is pending approval, and the purchase order hasn't been issued yet.
Budget Check Failed	The requisition failed the company budget check constraints.

What Do the Statuses for Completed Requisitions Mean?

Canceled	A worker canceled the requisition.
Completed	The requisition was fully invoiced and paid.
Denied	During the business process, an approver denied the request for goods or services.
Order Denied	The requisition was approved, but the purchase order was denied.
Closed	The requisition is closed.

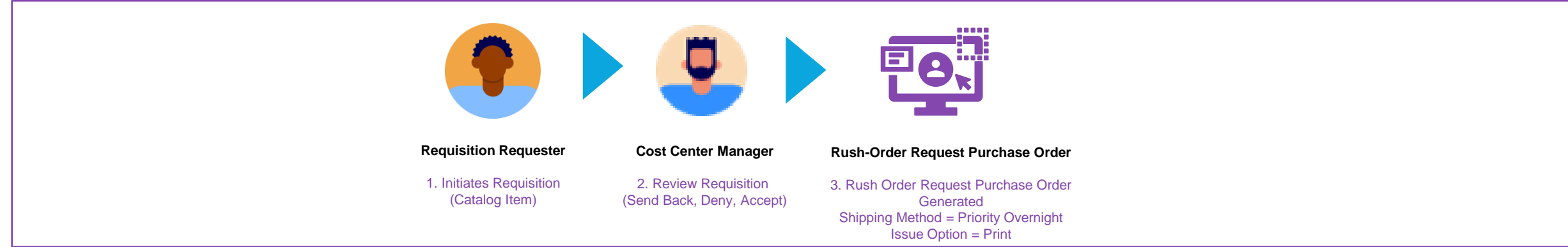
What Do the Statuses on the Timeline Mean?

Ordering	Awaiting Order: Requisition is approved but hasn't been sourced.	Ordering: The requisition is approved and partially sourced.	Ordered: The requisition is approved and fully sourced.
Receiving	Receiving: The purchase order is issued but isn't fully received.	Received: The purchase order is issued.	
Invoicing	Invoicing: The purchase order is issued but not fully invoiced.	Invoiced: The purchase order is issued and fully invoiced.	Match Exception: An invoice against the purchase order has a match exception.

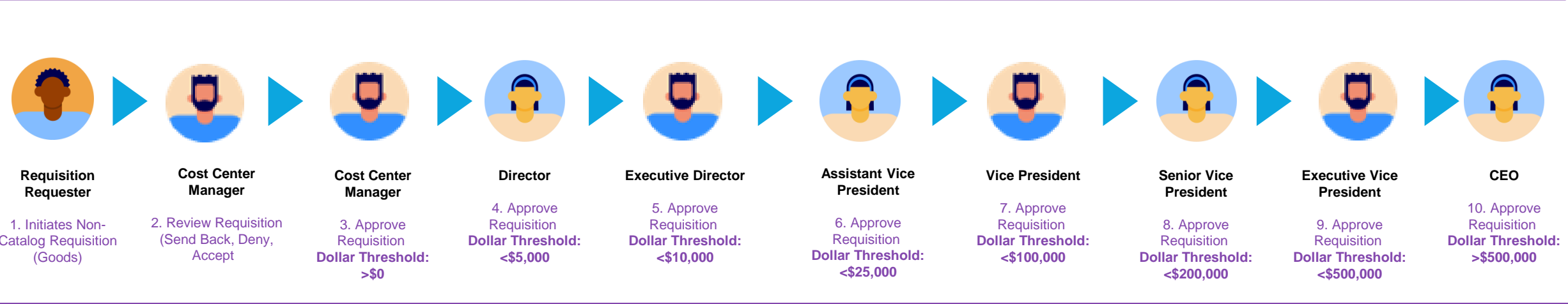
Requisition Business Process – Rush Order Request - Supplies

The process flow below illustrates the future Wellstar requisition business process in Workday for Gold. (Catalog and Non-Catalog)

Requisition Event for Purchase Items – Requisition Type = Rush Order Request



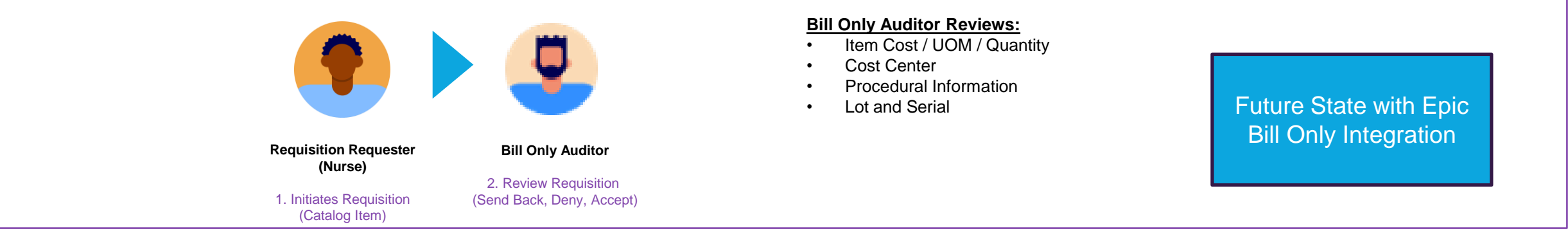
Requisition Event for Non-Catalog – Rush Order Request



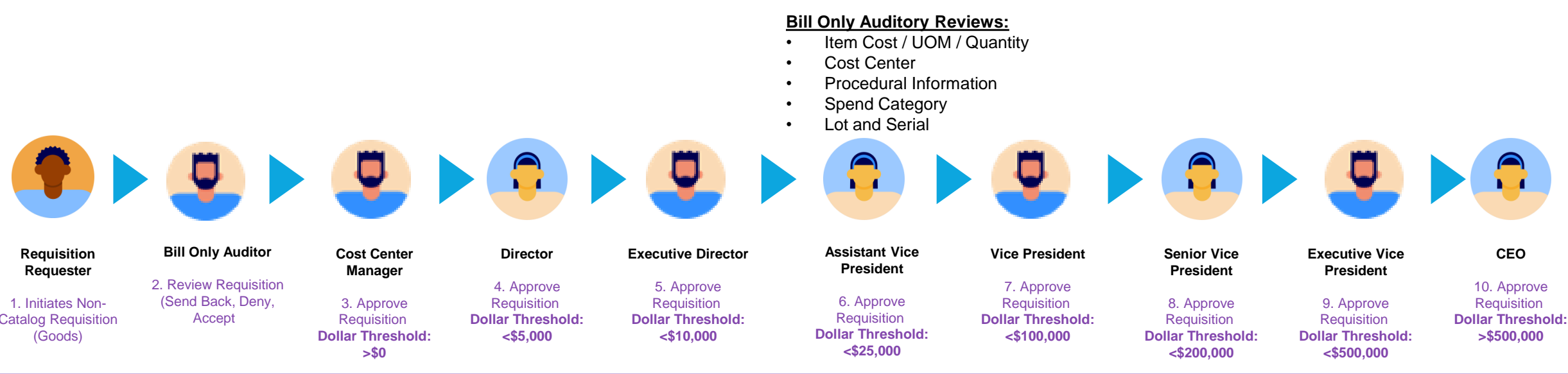
Requisition Business Process – Bill Only and Bill and Replace

The process flow below illustrates the future Wellstar requisition business process in Workday for Gold. (Catalog and Non-Catalog).

Requisition Event for Purchase Items – Requisition Type = Bill Only and Bill and Replace



Requisition Event for Non-Catalog –Bill Only - Bill and Replace



Approve, Send Back and Deny Options

There are four actions an approver can perform when receiving a pending requisition or change order.

After a requisition or change order is submitted by a requester or buyer, the transaction may be sent for approval depending on the business process, dollar threshold and requestor level.



You have submitted Requisition: REQ-100002445, Requester: Abigail Fannin, Date: 12/05/2023, Amount: \$750.00

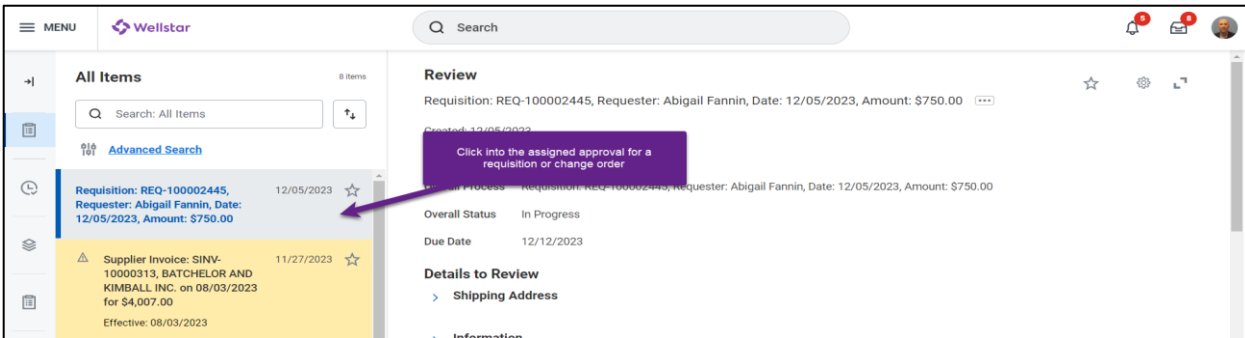
Up Next

Michael McCullough
Approval Chain by Manager

After the requisition is submitted, Workday will tell the requester who it routed to for approval

[Details and Process](#)

The approver will go to their inbox (the middle button in the top right corner of Workday) and find the requisition or change order sent to them for approval.



Wellstar

Search

All Items

Review

Requisition: REQ-100002445, Requester: Abigail Fannin, Date: 12/05/2023, Amount: \$750.00

Overall Status: In Progress

Due Date: 12/12/2023

Details to Review

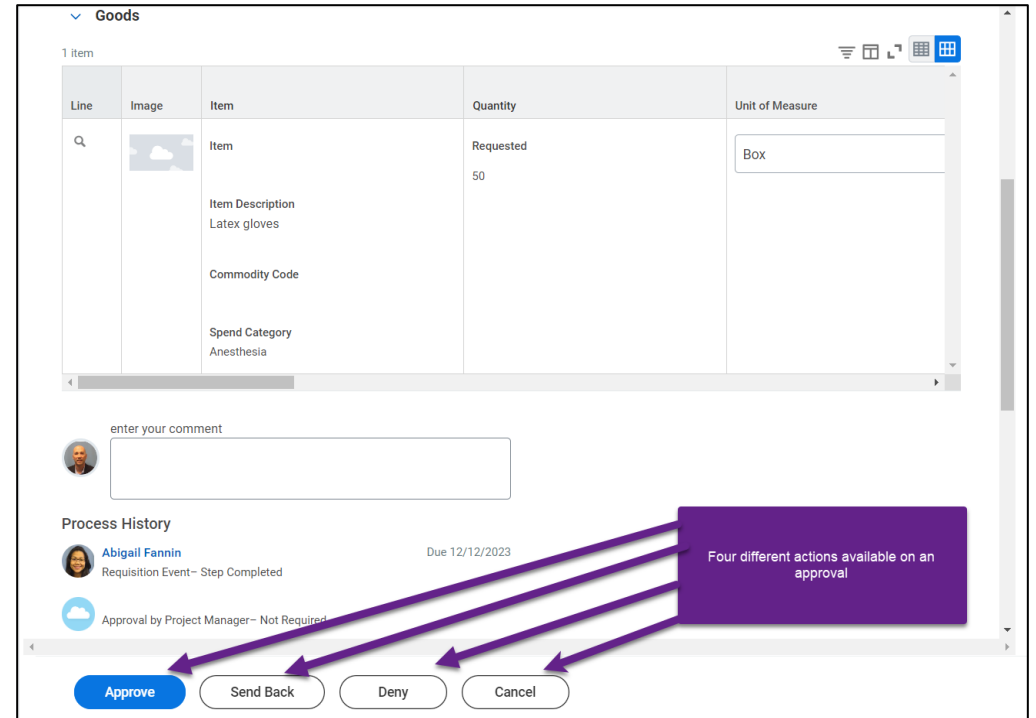
Shipping Address

Information

Click into the assigned approval for a requisition or change order

When an approver clicks into the assigned requisition or change order they have four options:

- **Approve** – continue to next approval or complete approval process.
- **Send Back** – provide a reason and send the requisition or change order back to the requester to update.
- **Deny** – provide reason for denial; the business process will be terminated, and the transaction will be closed.
- **Cancel** – close current approval and save for later.



Goods

1 item

Line	Image	Item	Quantity	Unit of Measure
		Item	Requested 50	Box
		Item Description Latex gloves		
		Commodity Code		
		Spend Category Anesthesia		

enter your comment

Process History

Abigail Fannin
Requisition Event - Step Completed
Due 12/12/2023

Approval by Project Manager - Not Required

Four different actions available on an approval

Approve Send Back Deny Cancel

Sending Back a Requisition or Change Order

The screenshot below shows the send back option when receiving a requisition or change order in your inbox.

Send Back

To * Abigail Fannin - Revise Requisition

Reason *

Submit Cancel

Process History

- Abigail Fannin Requisition Event - Step Completed Due 12/12/2023
- Approval by Project Manager - Not Required

Approve Send Back Deny Cancel

If the approver selects to send back a requisition or change order, they must provide a reason for the send back. The reason will help the requester make the correct changes to receive an approval.

Common reasons to send back:

- Incorrect Cost Center
- Incorrect UOM
- Inaccurate Quantity
- Incorrect Supplier
- Change Spend Category

Wellstar

MENU Search

All Items 86 items

Search: All Items

Advanced Search

Requisition: REQ-100002445, 12/05/2023

Requester: Abigail Fannin, Date: 12/05/2023, Amount: \$750.00

Sent Back by Michael McCullough

Revise Requisition REQ-100002445

Created: 12/05/2023 | Due: 12/12/2023

Company 1000 Wellstar Health System, Inc.

Status Draft

Shipping Address

Deliver-To * 1800 Parkway Center > PURCHASING RED

Ship-To Address 2200 Thornton Road
Lithia Springs, GA 30122
United States of America

Requisition Information

Request Date * 12/05/2023

Currency * USD

After a transaction is sent back, the requisition or change order will be sent back to the requester's inbox to make the correct changes. The initiator of the transaction can update the order. From there the approver can:

- Deny the requisition or change order, if the requested changes are not met or approved.
- Approve if the requisition or change order updates are made.

Denying a Requisition or Change Order

The screenshot below shows the deny option when receiving a requisition or change order in your inbox.

The screenshot displays the Wellstar interface. A 'Deny' dialog box is open, prompting the user to enter a reason for denying a requisition. The dialog box contains the following text: 'Deny', 'Selecting Deny may terminate the entire business process. Please enter your reason for terminating the business process below.', and a text input field labeled 'Reason *'. Below the input field are 'Submit' and 'Cancel' buttons. A purple arrow points to the 'Reason' input field. The background shows a requisition review screen with details for REQ-100002445, including the requester's name (Abigail Fannin), date (12/05/2023), and amount (\$750.00). The screen also shows a list of items, including two supplier invoices: 'Supplier Invoice: SINV-10000313, BATCHELOR AND KIMBALL INC. on 08/03/2023 for \$4,007.00' and 'Supplier Invoice: SINV-10000335, AFFORDABLE REMODELING on 07/24/2023 for \$4,375.00'.

When the deny option is selected, the approver will also need to provide a reason for the denial. Submitting the deny option will terminate the business process for this request. The requester will receive a notification, that their order was denied.

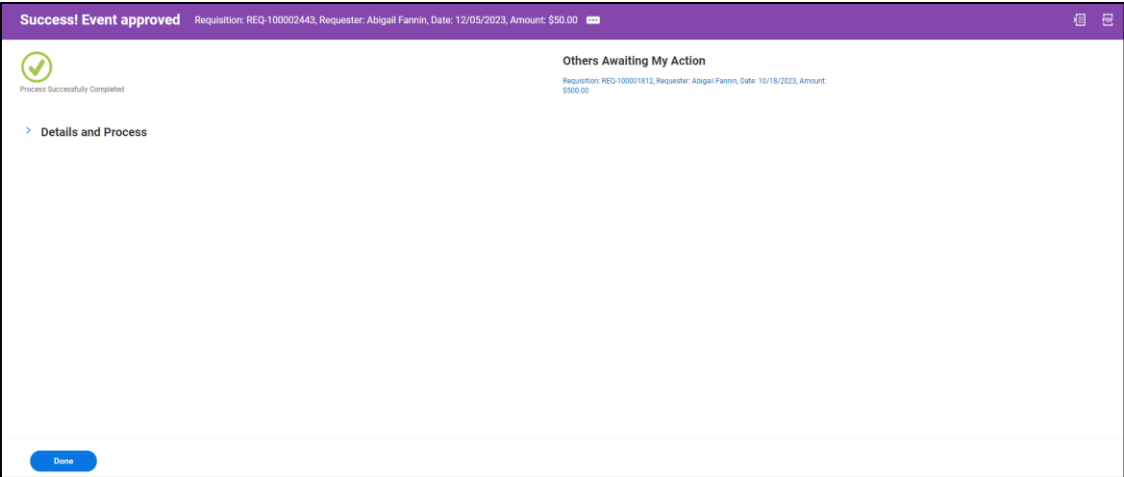
Common Deny Reasons:

- Incorrect Cost Center
- Inaccurate Quantity or Cost
- No Justification for Non-Catalog / Special Order

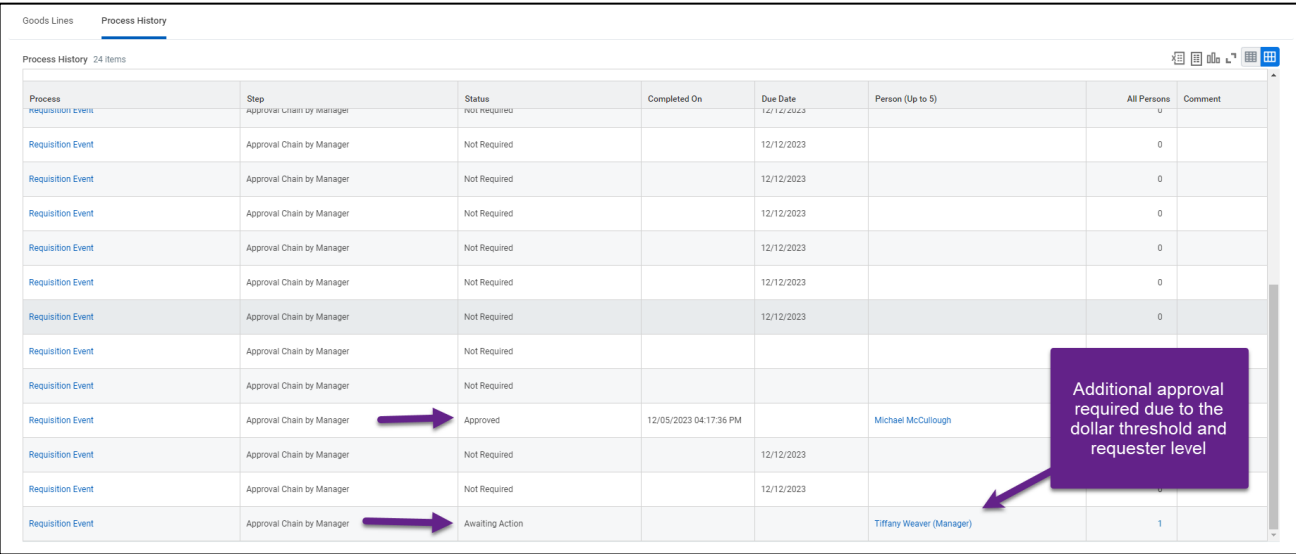
Approving a Requisition or Change Order

The screenshot below shows a green checkbox, which will appear only when a transaction is complete and when the transaction is awaiting for another approval.

A green checkbox will indicate the transaction is complete / approved and there are no additional steps in the business process.



After a transaction is approved, depending on the total requisition amount or change order amount, it can route to a higher security group for additional approvals.



Process	Step	Status	Completed On	Due Date	Person (Up to 5)	All Persons	Comment
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Approved	12/05/2023 04:17:36 PM		Michael McCullough		
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Not Required		12/12/2023		0	
Requisition Event	Approval Chain by Manager	Awaiting Action			Tiffany Weaver (Manager)	1	

Purchase Order Business Process

The process flow below illustrates the future Wellstar purchase order business process in Workday for Gold.

*We have a condition rule (critical): if PO type does not = SVCA, Capital, Tecsyst or Administrative, must create a requisition.

Purchase Order Business Process (SVCA) | Purchase Order Event for Administrative Orders



Supplier Contract Specialist

- 1. Initiates Purchase Order Without a Requisition
 - Purchase Order Type = SVCA
 - PO Contains Service Lines
 - PO Line Contains SVCA Contract



Buyer

- 1. Initiates Purchase Order Without a Requisition

PO Type = Administrative



Procurement Operations Lead

- 2. Approve Requisition
Dollar Threshold: >\$0

Purchase Order Business Process: Non-Requisition Purchase Order Types = Tecsyst Order and Capital (No Approval)



Tecsyst

- 1. Purchase Order Generated from "External Warehouse" Tecsyst – Approval in Tecsyst
No Approval in Workday



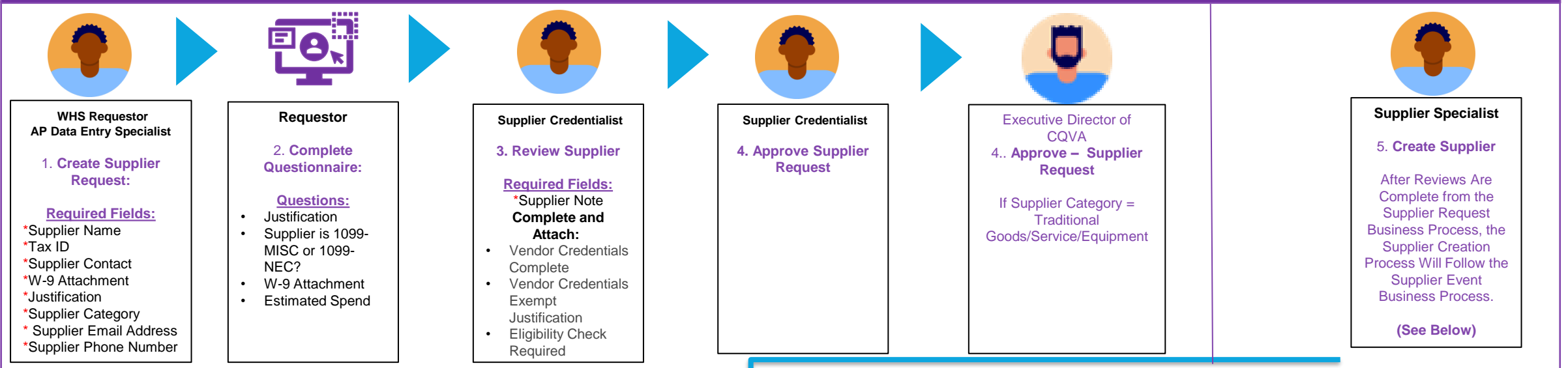
Strata – Capital PO

- 1. Purchase Order Generated from Strata
Approval in Strata
No Approval in Workday

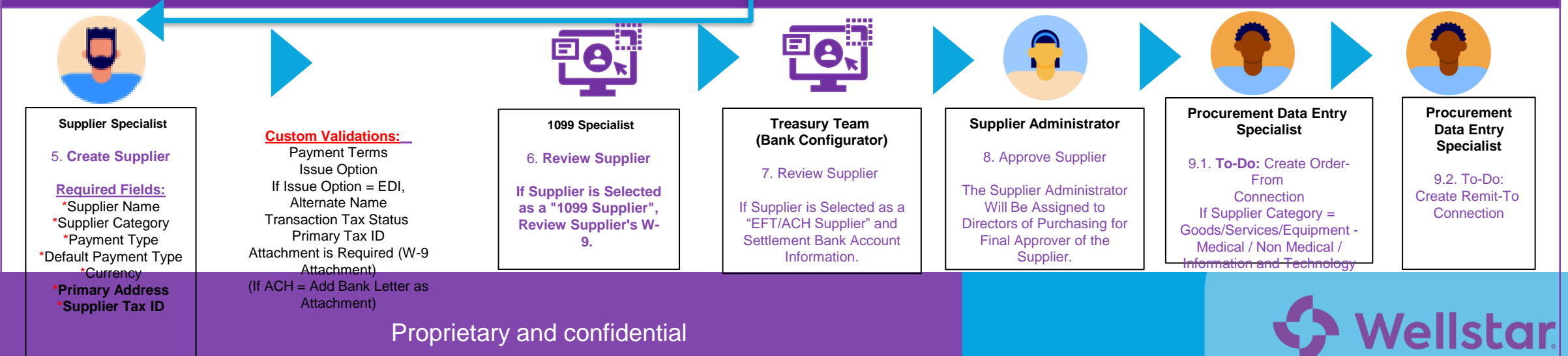
Supplier Business Process – Request and Event

The process flow below illustrates the Wellstar supplier onboarding process in Workday. (For P3)

Supplier Request: Create Supplier Request



Supplier Event: Create Supplier



Proprietary and confidential





Supply Chain Key Dates to Remember

- **Dec. 22:** Please stop ordering any non-essential supplies. Limit orders moving forward to patient care items from the item master.
- **Dec. 28:** Last day to submit requisitions.
- **Dec. 29:** Last day to approve open requisitions in Lawson.
- **Dec. 29:** Last day to issue a purchase order in Lawson.
- After training, all team members requesting requisitions need to select a default workspace.
- **Jan. 1:** Create requisitions in Workday.