



Labor Management Essentials

Optimizing our staffing resources for value-driven care

November 2016



Overview

- Why Sustainable Labor Management Strategies?
- Labor Management & Strategy Team (LMST)
- Labor Request (Requisition) Approval Process
- Labor Request Approval Tools
- Leader Support & Resources
- Timeline



Why are we Talking about Labor Management Strategies?

Healthcare is changing

- Move to value-based care
- Declining reimbursements
- Transition from inpatient to ambulatory care

UVA's approach to Labor Management must change

- Flex budgeting with a focus on high quality (safe) care for our patients
- Having the right staff, for the right work, at the right time, in the right place...now and in the future
- Break down silos and look at positions from an organizational perspective



What changes are we making?

Establishment of a Labor Management & Strategy Team (LMST)

- Ensure staffing levels are supported by operational outcomes and the Flex Budget
- Ensure increased leadership knowledge and understanding of the departmental Flex Budget and team member productivity
- Increase workforce flexibility and encourage leaders to share resources or funding sources



LABOR MANAGEMENT & STRATEGY TEAM

- A new approach



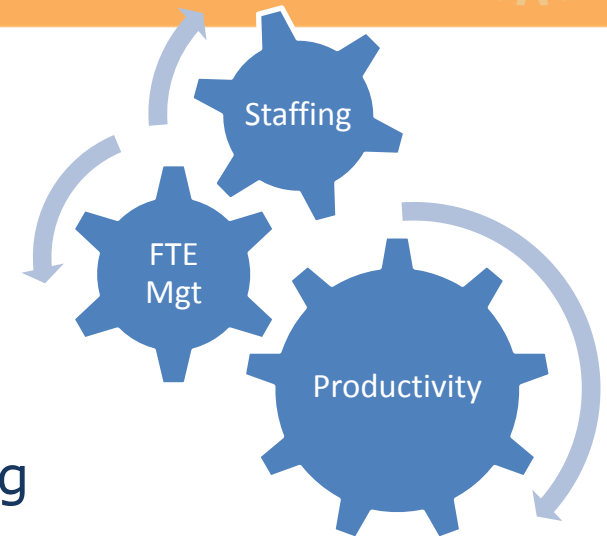


Planning for Success

Labor Management & Strategy

Team Focus

- UVA mission, values and work plan goals
- Ensure leaders have the tools and training to effectively manage their existing resources
- Optimization of the workforce through internal efficiencies
- Creation of a nimble and adaptive approach to staffing in response to current and anticipated national workforce shortages in key clinical, technical and leadership roles



Tackling labor management at the Medical Center level results in improved coordination of resources and proactive identification of workforce needs overall.



Labor Management & Strategy Team (LMST)

Members:

- Tina Mammone, Chief Nursing Officer
- Bill Fulkerson, Chief Operating Officer
- Nick Mendyka, Chief Financial Officer
- John Boswell, Chief Human Resources Officer



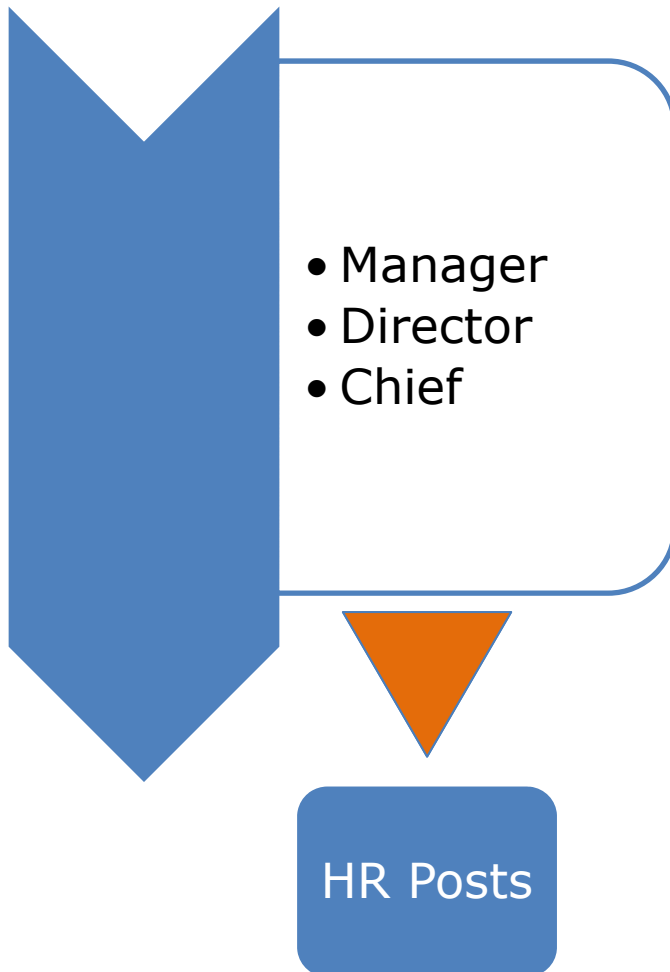
Requisition Approval Process





Requisition Approval Process

Current



New



**Depends on the request*



Requisition Approval Process

Why the increased number of approvals?

- **Each level has a different perspective:**
 - Managers: Single department
 - Directors: Multiple departments
 - Service Line Administrators/Associate Chiefs: Service Line
 - LMST: Medical Center

All perspectives are necessary to ensure we are living our values of Stewardship and Accountability in the current and future healthcare environment.



SUSTAINABLE LABOR MANAGEMENT STRATEGIES - TOOLS

- Flex Labor by Job Role Report
- Labor Request Approval Guidelines
- LMST Labor Request Template
- Request for New or Changed Positions/Role Audits



What terms do I need to understand to use Flex Labor reports?



Key Terms

- **Unit of Service (UOS):** A critical element for the Flex Labor report. It is a workload statistic used to measure how busy a department has been for a given time period. The type of UOS associated with the various departments are typically are as follows:
 - Inpatient department – Patient Days w SS/PP. Patient days including short stay / post procedure patients. Based on beds occupied during the midnight census.
 - Procedural department – Billed Procedures. A count of procedures recorded in the patient billing system for this department.
 - Clinic department – Visits. A count of attended patient visits.
 - Administrative department – Calendar Days. A simple statistic counting number of days in the calendar month or fiscal year.
- **Total Worked FTE:** Calculation of Full Time Equivalence (FTE) based on actual worked hours. Note does not include PTO.
- **Actual:** Actual amount of activity.
- **Budget:** Static budgeted amount of activity.
- **Flex Adjustment Factor:** Calculated as Actual UOS divided by Budgeted UOS. Used in Flex Budget calculation.
- **Flex Budget:** Budget that has been adjusted, either up or down, for changes in UOS. Uses the Flex Adjustment Factor ratio to adjust Budget up or down accordingly.
- **Variance (Flex vs Act):** Difference between Flex Budget and Actual. *Note this information is the main point of reference for the position approval process and appears as highlighted columns on the report.*
- **Variable Roles:** Group of job roles identified as being variable for “flexing” due to the Flex Adjustment Factor.
- **Fixed Roles:** Any job roles not identified as being Variable. These do not “flex”.
- **Fiscal Month / YTD:** The fiscal year begins with July and ends with June.

What should I know about/how should I use the Flex Labor by Division Report ?



1 Positive (black) variance indicates below budget. Possible factors: PTO usage, higher actual UOS than budgeted

2 Negative (red) variance indicates over budget. Possible factors: Overtime, lower actual UOS than budgeted

		Fiscal Month			Fiscal Year to Date		
		Aug-FY17			AugYTD17		
		Total Worked FTE			Total Worked FTE		
		Actual	Flex Budget	Variance [Flex vs Act]	Actual	Flex Budget	Variance [Flex vs Act]
Sample Admin Area 1	Variable Roles	230.74	257.43	1 26.68	232.26	255.06	1 22.80
	Fixed Roles	121.69	129.03	7.33	123.58	129.93	6.35
	Total	352.43	386.45	34.02	355.84	384.98	29.14
Sample Admin Area 2	Variable Roles	42.87	59.28	16.41	41.51	54.31	12.80
	Fixed Roles	31.64	31.31	2 (0.33)	30.35	31.31	0.96
	Total	74.51	90.59	16.08	71.86	85.62	13.76
Sample Admin Area 3	Fixed Roles	56.23	56.93	0.70	55.91	56.93	1.02
	Total	56.23	56.93	0.70	55.91	56.93	1.02
Sample Admin Area 4	Fixed Roles	17.63	19.07	1.44	16.66	19.07	2.41
	Total	17.63	19.07	1.44	16.66	19.07	2.41
Sample Division	Variable Roles	273.61	316.71	43.09	273.77	309.37	35.60
	Fixed Roles	227.19	236.34	9.14	226.50	237.24	10.74
	Total	500.80	553.05	52.23	500.27	546.61	46.34

Variance

Variance

What should I know about/how should I use the Flex Labor by Administrator (Admin) Report ?



Flex Labor by Job Role: Period Ending Aug-FY17
Example Administrative Area

	AugYTD17			Aug-FY17			AugYTD17		
	UOS			Total Worked FTE			Total Worked FTE		
	Actual	Budget	Flex Adj Factor	Actual	Flex Budget	Variance [Flex vs Act]	Actual	Flex Budget*	Variance [Flex vs Act]
① 2XXX ICUDept PATIENT DAYS W. SSP				2.81	3.38	0.57	2.74	3.35	0.61
Job Roles				1.04	1.72	0.68	0.95	1.71	0.75
				0.00	(0.01)	(0.01)	0.00	0.00	0.00
				1.69	7.85	6.17	1.50	7.80	6.29
				56.13	60.64	② 4.50	53.98	60.19	② 6.21
				16.94	16.73	(0.21)	16.81	16.61	(0.21)
				0.04	0.09	0.05	0.29	0.09	(0.20)
				0.72	0.56	(0.15)	0.77	0.56	(0.21)
				2.89	0.58	(2.31)	3.11	0.58	(2.53)
Variable Roles				82.27	91.55	9.28	80.16	90.88	10.72
				5.91	5.08	(0.83)	6.01	5.08	(0.92)
				0.79	0.92	0.13	0.88	0.92	0.04
				1.00	0.92	(0.08)	1.00	0.92	(0.08)
				1.02	1.83	0.81	0.87	1.83	0.97
				0.96	0.90	(0.06)	0.77	0.90	0.13
Fixed Roles				9.68	9.65	(0.02)	9.53	9.65	0.13
Dept Total	2,438	2,408	*1.0124	91.94	101.20	③ 9.26	89.69	100.54	③ 10.85

① The department number, name, and UOS type.

② This RN Clinician 2 job role has an August Variance of +4.5 and August YTD of +6.21

③ This department has an August Variance of +9.26 and an August YTD of +10.85

* 2,438 divided by 2,408 = 1.0124. This department's budgeted FTE will flex up 1.24% for variable roles.

What are Flex Labor Reports and how do I access them?



- The Flex Labor Report is a tool to help you make informed business decisions and is the primary point of reference to support the position approval process.
- Typically the report is available by the 10th business day of the month and available at O:\SHARED\REPORTS\HyperionReports\Management_Reports.
- Email notifications are sent each month once the latest report is accessible.
- Note the subfolders for Fiscal Year and Period. Make sure you are referencing the most recent set of folders.



– Division Summary folder contains summary reports for each division. These reports give a high-level view of a division but do not provide job role / department information.

Health Information Technology Division-Flex Labor by Division.pdf	9/15/2016 10:57 AM	Adobe Acrobat Document	8 KB
Hospital Operations Division-Flex Labor by Division.pdf	9/15/2016 10:57 AM	Adobe Acrobat Document	12 KB
Human Resources Division-Flex Labor by Division.pdf	9/15/2016 10:57 AM	Adobe Acrobat Document	7 KB
Nursing & Patient Care Svcs Division-Flex Labor by Division.pdf	9/15/2016 10:57 AM	Adobe Acrobat Document	10 KB

– Service Line – Admin Area folder contains reports for each administrative area. Each report includes department / job role detail. These reports contain detail information including job role / department level

Childrens-Flex Labor by Admin.pdf	9/15/2016 10:56 AM	Adobe Acrobat Document	45 KB
Clinical Ancillary Services-Flex Labor by Admin.pdf	9/15/2016 10:56 AM	Adobe Acrobat Document	11 KB
Clinical Care Support-Flex Labor by Admin.pdf	9/15/2016 10:56 AM	Adobe Acrobat Document	14 KB
Clinical Data Management-Flex Labor by Admin.pdf	9/15/2016 10:56 AM	Adobe Acrobat Document	15 KB
Clinical Engineering-Flex Labor by Admin.pdf	9/15/2016 10:56 AM	Adobe Acrobat Document	13 KB



- Flex Medical Supply and Pharmaceuticals Report.
 - Budget will flex up/down for pharmaceutical and medical supply expenses only.
 - Utilizes same methodology (Flex Adjustment Factor) as Flex Labor Report.
 - Targeted release of January 2017.

Flex by Department - Medical Supply and Pharmaceuticals: Period Ending Sep-FY17 Sample Admin

		SepYTD17		Sep-FY17						SepYTD17					
		UOS		Medical Supplies Exp			Pharmaceutical Expense			Medical Supplies Exp			Pharmaceutical Expense		
		Actual	Budget	Actual	Flex Budget	Variance [Flex vs Act]	Actual	Flex Budget	Variance [Flex vs Act]	Actual	Flex Budget	Variance [Flex vs Act]	Actual	Flex Budget	Variance [Flex vs Act]
2XXX Unit A	PATIENT DAYS W. SS/P	2,029	1,909	\$51,319	\$49,728	(\$1,591)	\$29	\$11	(\$18)	\$142,891	\$142,540	(\$350)	\$45	\$35	(\$10)
2XXY Unit B	PATIENT DAYS W. SS/P	1,924	1,939	\$41,049	\$34,004	(\$7,045)	\$22	\$12	(\$10)	\$111,496	\$107,455	(\$4,041)	(\$33)	\$38	\$71
2XXZ ICU Unit	PATIENT DAYS W. SS/P	648	71	\$5,035	\$718	(\$4,317)	\$11	\$11		\$104,190	\$94,748	(\$9,442)	(\$4)	\$38	\$41
2YYY Procedural Lab	CASES	840	68	\$967,303	\$1,066,906	\$99,603	\$0	\$10	\$10	\$2,897,964	\$3,433,723	\$535,759	\$0	\$33	\$33
Sample Admin				\$1,092,303	\$1,175,357	\$82,742	\$51	\$44	(\$7)	\$3,256,541	\$3,778,466	\$521,926	\$8	\$144	\$135

Future Management Reporting Enhancements (Continued)



- Service Line Profit / Loss Report.
 - Summarized view of patient / cost data by service line
 - Current and prior fiscal year rolling months.
 - Targeted release of January 2017.

Who Should I Contact with Questions? Contact Your Finance Consultant



Finance Consultants	Supported Service Lines and Operating Areas
Chris Branin cgb5r@virginia.edu	<ul style="list-style-type: none"> ▪ HIT ▪ EPIC / PFA / PFB
Keith Morris KAM5QQ@hscmail.mcc.virginia.edu	<ul style="list-style-type: none"> ▪ Perioperative ▪ QPI / Be Safe / Special Projects ▪ Patient Experience ▪ Supply Chain ▪ Facilities Planning & Management
Kelly Bell kfb2m@virginia.edu (434) 924-5302	<ul style="list-style-type: none"> ▪ Women’s & Children’s ▪ Medical Subspecialties: Allergy, Dermatology, Endocrinology, Family Medicine, General Medicine, ID/Travelers, Nephrology, Pulmonary, Trauma, Urology ▪ Advanced Nursing ▪ Nursing Professional Development Services ▪ Care Management ▪ Labor and Physician Workforce
Nancy Blackburn nb6v@virginia.edu (434) 924-2714	<ul style="list-style-type: none"> ▪ Musculoskeletal ▪ Neurosciences & Behavioral Health ▪ Clinical Ancillary: Radiology, Therapies
Kim Richardson kgv4x@virginia.edu (434) 924-5199	<ul style="list-style-type: none"> ▪ Heart & Vascular ▪ Transplant ▪ Ophthalmology ▪ Surgical subspecialties: Dentistry, ENT, General Surgery, Plastics, Urology ▪ HR, Marketing, GME, CEO
Stephanie Baker sab2wr@virginia.edu (434) 243-2717	<ul style="list-style-type: none"> ▪ Oncology ▪ Digestive Health ▪ Palliative Care ▪ Post Acute: LTACH, Continuum ▪ Clinical Ancillary: Pharmacy, Labs
Jerry Huml gth6j@virginia.edu (434) 924-5659	<ul style="list-style-type: none"> ▪ Emergency Department ▪ Emergency Management ▪ Infection Control ▪ Patient & Guest Services ▪ Environment of Care



Key Categories

1) Variable Positions

- Positions that fluctuate with work volume or units of service such as, patient days, calendar days, etc.
- Final approval may occur with either the Chief or LMST
- Examples include RNs, PCAs, Physical Therapist Clin 2

2) Fixed Positions

- Positions that are not influenced by work volume -
- All positions not identified as *Variable*
- Final approval by LMST
- Examples include Administrative Assistants, Software Systems Engineer, Nurse Practitioner, etc.

3) Management Positions

- All positions included in the "Management" job family
- Must be approved by Chief, LMST, **and CEO**



Key Categories

4) Other

- Less common situations that require various levels of approval
- Because they are less common, managers often have questions about the approval process
- As a result, information on the approval process for these situations is provided in the LMST Guidelines Summary
- Some scenarios will require approval outside of Taleo (new forms will be introduced)

A few examples include:

- Change in job role resulting in a pay increase where the change is not part of an automatic career progression
- All Wage positions, including replacement, new or changes in status from Wage to Benefit or Benefit to Wage
- Change in classification from “fixed” to “flex” and vice versa



Review Leader Tool

Summary of Labor Management & Strategy Team Approval Guidelines

- Variable position requests
- Fixed position requests
- "Other" requests



KEY TALEO CHANGES





Taleo

Overview of Changes:

- Approval process
- Variance Targets
- Requisition Sample
- Traveler/Administrative Temp (non clinical) request



Key Taleo Changes

APPROVAL PROCESS





Taleo Approval Process

- All positions require all levels of management approval
- The approval process may vary, based on key factors
- Variable, Fixed and Management positions may have different criteria and potentially different final approvers



Key Taleo Changes – APPROVALS

- Updated to reflect new approval process

CURRENT

- One level up + Chief
- Two approvers



NEW

- All levels in management chain*
- Could be up to five approvers

* Levels include Department Manager, Director, Administrator, Associate Chief, Chief

Note, not all departments have all levels in their management hierarchy



Taleo Approval Process

- Variable Positions:

- Variable positions: Meeting Flex Variance targets:



- Variable Positions: Not Meeting Flex Variance targets:

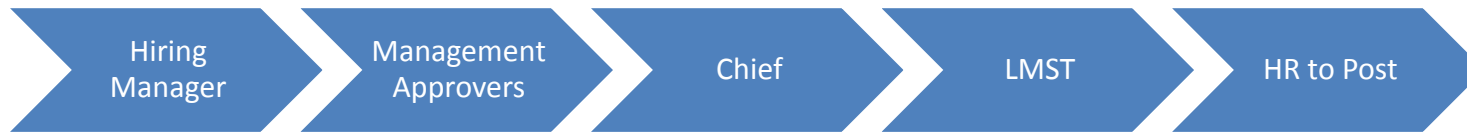




Taleo Approval Process

- **Fixed Positions:**

- All Requisitions



- **Management Positions:**

- All positions in management job family
- Assistant Manager to Chief
- Replacement, New, Revision





Taleo Approval Process

1. Requisitions requiring only Chief approval:

- Upon Chief approval, HR is notified via Taleo
- HR posts the position
- No delays

Note: Chiefs with potential final approval authority:

William Fulkerson, COO

Tina Mammone, CNO

Nicholas Mendyka, CFO

John Boswell, CHRO

Rick Skinner, CITO

Jeffrey Keller, CIO

Michelle Hereford, Chief Community Hospital and Post Acute Division

Trish Cluff, Chief Strategic Relations & Marketing

Dr. Tracey Hoke, Chief Quality and PI

Mark Pulczynski, Chief Revenue Cycle

Dr. Chris Ghaemmaghmi, CMO

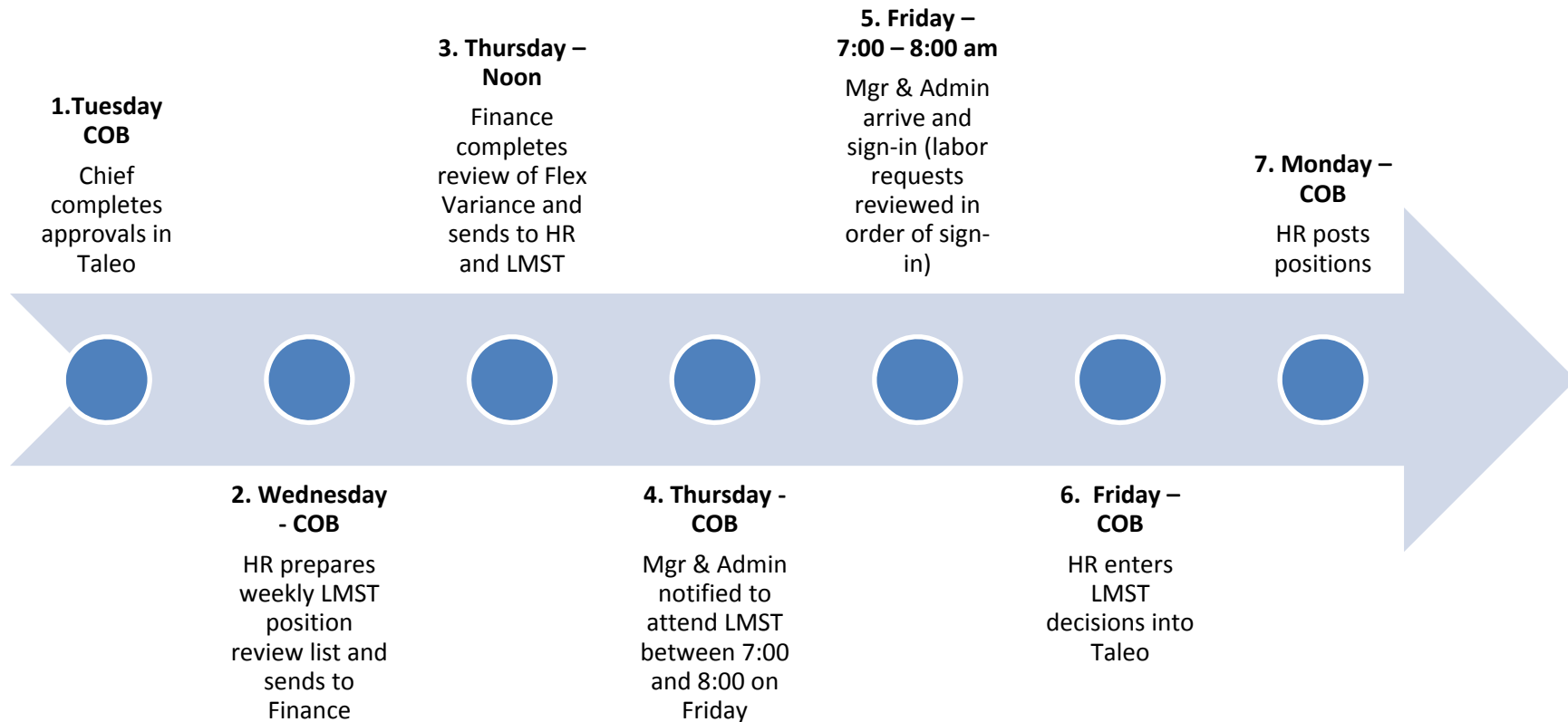
Douglas Lischke, Chief Accounting Officer – HS

Charles Coder, Chief Financial Officer – JOC



Taleo Approval Process

2. Requisitions Requiring LMST Approval – Timing/Process:





Taleo Approval Process

3. Requisitions requiring CEO approval:

- Upon completion of LMST approval
- LMST Committee member reviews with CEO at their next scheduled 1:1 meeting
- Typically within one week of the LMST meeting
- Upon approval, HR will be notified via email and the position will be posted

- Note: for positions that report to other health system executives (Dr. Richard Shannon, Larry Fitzgerald), the LMST member will review the recommendation with them for final approval



Key Taleo Changes

FLEX VARIANCE





Key Taleo Changes – FLEX VARIANCE

CURRENT

– Fixed Positions:

Approval requires Variance of
-1.0 or less

↕ *SAME*

– Variable Positions:

Approval requires Variance of
-1.0 or less

Variance Criteria:

Flexible Labor by Job Role
Report:

- YTD for Job Role



NEW

– Variable Positions:

Approval requires variance to
be -0.5 or less

– Fixed Positions:

Approval requires variance to
be 0.0 or less

Variance Criteria:

Flexible Labor by Job Role
Report:

- Month and Year-to-Date
- Job Role and Department



Key Taleo Changes

REQUISITION SAMPLE





Recruiting Tasks Requisitions Candidates Offers Libraries

New Requisition

Requisition

Save Save and Close Cancel

Show fields required to: Save

1. Requisition Structure

Identification

* Posting Title Position Number

Structure

Edit

Organization

- UVAHS UVA Health System
- UVAMC UVA Medical Center
- Level 3 AVP for Hospital & Clinics Ops
- Level 4 Patient Care Services
- Level 5 Adult Critical Care

Primary Location

State Virginia
County Charlottesville City
City Charlottesville
Work Location [Main Hospital](#)

Job Field

Category Registered Nurse

Department

* Job Code/Job Title (PeopleSoft)

Requisition Summary (Left Panel):

Requisition: RN Clinician 2

Status: Draft
Status Details: N/A

Candidates for this requisition: 0

Activated Languages: English (Base)

Requisition Type: Professional

Department: MICU

Primary Location: [Main Hospital](#)

Recruiter:

Hiring Manager: Carpenter, Richard

No additions to this section, some items moved and some removed to simplify.



New Requisition

Requisition: [Dropdown]

Save Save and Close Cancel

95543 - RN Clinician 2

Owners

* Recruter [Text Field]

* Hiring Manager
Carpenter, Richard M

Collaborators

Modify Add Frequent Collaborators

First Name	Last Name	Email	Title
There is no data to display.			

2. Process

Candidate Selection Workflow

No changes to this section

Be sure to add collaborators



The screenshot shows the 'New Requisition' form in Taleo. The left sidebar contains a 'Requisition' card for 'RN Clinician 2' with a status of 'Draft' and 'N/A' details. Below this are sections for 'Activated Languages' (English), 'Requisition Type' (Professional), 'Department' (MICU), 'Primary Location' (Main Hospital), 'Recruiter', and 'Hiring Manager' (Carpenter, Richard). The main form area includes a 'Request Information' section with several drop-down menus. Three callout boxes provide the options for these menus:

- Drop Down Options:**
 - Variable
 - Fixed
 - Management
 - Wage (Variable or Fixed)
- Drop Down Options:**
 - Replacement
 - New Position (job code already exists in department)
 - New Position (job code does not exist in department)
- Drop Down Options:**
 - Yes
 - No



UNIVERSITY of VIRGINIA HEALTH SYSTEM

Recruiting Tasks Requisitions Candidates Offers Libraries

Search Requisition

New Requisition

Requisition

Save Save and Close Cancel

Show fields required to: Save

Month-Total Worked FTE
Job Role-Variance (Flex vs. Actual): 1

Department Total-Variance (Flex vs. Actual): 2

Year to Date-Total Worked FTE
Job Role-Variance (Flex vs. Actual):

Department Total-Variance (Flex vs. Actual):

Supported by Budget:

Is this FTE supported in your Monthly job role variance?*

Not Specified

Is this FTE supported in your Monthly department variance?*

Not Specified

Is this FTE supported in your YTD job role variance?*

Not Specified

Is this FTE supported in your YTD department variance?*

Not Specified

Is this FTE supported by the Flex Labor Variance?*

Not Specified

*NOTE: If the answer to any of the four budget variance questions is NO, you must answer NO to this question.

Flex Labor Variance Targets:

- Variable: To answer yes, requires the variance to be negative .5 or less (ex. -0.5, -0.4, 0.0, +1.2)
- Fixed: To answer yes, requires the variance to be 0.0 or less (0.0, +0.1, +3.0)

Below is the path to look up information related to the Budget fields above.

0:\SHARED\REPORTS\Hyperion\Reports\Management_Reports

Additional Information

Additional Information

From the Flex Labor by Job Role Report:

- Month/Job Role Variance
- Month/Department Variance
- Data is from the report

Taleo – New Requisition



Flex Labor by Job Role: Period Ending Aug-FY17
Example Administrative Area

- Month
- Job Role

	AugYTD17			Aug-FY17			AugYTD17		
	UOS			Total Worked FTE			Total Worked FTE		
	Actual	Budget	Flex Adj Factor	Actual	Flex Budget	Variance [Flex vs Act]	Actual	Flex Budget*	Variance [Flex vs Act]
2XXX ICU Dept PATIENT DAYS W. SS/P									
95506 - Patient Care Technician				2.81	3.38	0.57	2.74	3.35	0.61
95710 - Patient Care Assistant				1.04	1.72	0.68	1.95	1.71	0.75
95773 - Patient Companion				0.00	(0.01)	(0.01)	0.00	0.00	0.00
95521 - RN Clinician 1				1.69	7.85	6.17	1.50	7.80	6.29
95543 - RN Clinician 2				56.13	60.64	4.50	53.98	60.19	6.21
95557 - RN Clinician 3				16.94	16.73	(0.21)	16.81	16.61	(0.21)
95566 - Registered Nurse-MC Pool				0.04	0.09	0.05	0.29	0.09	(0.20)
95568 - RN Clinician 4				0.72	0.56	(0.15)	0.77	0.56	(0.21)
95938 - Registered Nurse-UB Pool				2.89	0.58	(2.31)	3.11	0.58	(2.53)
Variable Roles				82.27	91.55	9.28	80.16	90.88	10.72
95722 - Health Unit Coordinator				5.91	5.08	(0.83)	6.01	5.08	(0.92)
95727 - Administrative Assistant				0.79	0.92	0.13	0.88	0.92	0.04
95613 - Nurse Manager				1.00	0.92	(0.08)	1.00	0.92	(0.08)
96128 - Assistant Nurse Manager				1.02	1.83	0.81	0.87	1.83	0.97
95641 - Nursing Education Coord 2				0.96	0.90	(0.06)	0.77	0.90	0.13
Fixed Roles				9.68	9.65	(0.02)	9.53	9.65	0.13
Dept Total	2,438	2,408	1.0124	91.94	101.20	9.26	89.69	100.54	10.85

- Month
- Department



UNIVERSITY OF VIRGINIA HEALTH SYSTEM

Recruiting Tasks Requisitions Candidates Offers Libraries

Search Requisition

New Requisition

Requisition

Save Save and Close Cancel

Month-Total Worked FTE
Job Role-Variance (Flex vs. Actual):

Year to Date-Total Worked FTE
Job Role-Variance (Flex vs. Actual):

Supported by Budget:

Is this FTE supported in your Monthly job role variance?*

Is this FTE supported in your Monthly department variance?*

Is this FTE supported in your YTD job role variance?*

Is this FTE supported in your YTD department variance?*

Is this FTE supported by the Flex Labor Variance?*

*NOTE: If the answer to any of the four budget variance questions is NO, you must answer NO to this question.

Flex Labor Variance Targets:

- Variable: To answer yes, requires the variance to be negative .5 or less (ex. -0.5, -0.4, 0.0, +1.2)
- Fixed: To answer yes, requires the variance to be 0.0 or less (0.0, +0.1, +3.0)

Below is the path to look up information related to the Budget fields above.

0:\SHARED\REPORTS\Hyperion\Reports\Management_Reports

Additional Information

Additional Information

From the Flex Labor by Job Role Report:

- Year to Date/Job Role Variance
- Year to Date/Department Variance
- Data is from the report

Taleo – New Requisition



Flex Labor by Job Role: Period Ending Aug-FY17
Example Administrative Area

- Year to Date
- Job Role

	AugYTD17			Aug-FY17			AugYTD17		
	UOS			Total Worked FTE			Total Worked FTE		
	Actual	Budget	Flex Adj Factor	Actual	Flex Budget	Variance [Flex vs Act]	Actual	Flex Budget*	Variance [Flex vs Act]
2XXX ICU Dept PATIENT DAYS W. SS/P				2.81	3.38	0.57	2.74	3.35	0.61
95506 - Patient Care Technician				1.04	1.72	0.68	0.95	1.71	0.75
95710 - Patient Care Assistant				0.00	(0.01)	(0.01)	0.00	0.00	0.00
95773 - Patient Companion				1.69	7.85	6.17	1.50	7.80	6.29
95521 - RN Clinician 1				56.13	60.64	4.50	53.98	60.19	6.21
95543 - RN Clinician 2				16.94	16.73	(0.21)	16.81	16.61	(0.21)
95557 - RN Clinician 3				0.04	0.09	0.05	0.29	0.09	(0.20)
95566 - Registered Nurse-MC Pool						6	0.77	0.56	(0.21)
95568 - RN Clinician 4						8	3.11	0.58	(2.53)
95938 - Registered Nurse-UB Pool				82.27	91.55	9.28	80.16	90.88	10.72
Variable Roles				5.91	5.08	(0.83)	6.01	5.08	(0.92)
95722 - Health Unit Coordinator				0.79	0.92	0.13	0.88	0.92	0.04
95727 - Administrative Assistant				1.00	0.92	(0.08)	1.00	0.92	(0.08)
95613 - Nurse Manager				1.02	1.83	0.81	0.87	1.83	0.97
96128 - Assistant Nurse Manager				0.96	0.90	(0.06)	0.77	0.90	0.13
95641 - Nursing Education Coord 2				9.68	9.65	(0.02)	9.53	9.65	0.13
Fixed Roles									
Dept Total	2,438	2,408	1.0124	91.94	101.20	9.26	89.69	100.54	10.85

- Year to Date
- Department

3

4



Drop Down Options (all four questions):
- Yes
- No

Drop Down Option:
- Yes
- No
If No to any of the four preceding questions, must answer **No**

Flex Labor Variance Targets:

- Variable: To answer yes, requires the variance to be negative .5 or less (ex. -0.5, -0.4, 0.0, +1.2)
- Fixed: To answer yes, requires the variance to be 0.0 or less (0.0, +0.1, +3.0)

Below is the path to look up information related to the Budget fields above.
O:\SHARED\REPORTS\HyperionReports\Management_Reports

- Flex Labor Variance Targets
- How to access Flex Labor by Job Role Report

Taleo – New Requisition



Department
MICU
Primary Location
Main Hospital
Recruiter
Hiring Manager
Carpenter, Richard

Is this FTE supported by the Flex Labor Variance?*

Not Specified

*NOTE: If the answer to any of the four budget variance questions is NO, you must answer NO to this question.

Flex Labor Variance Targets:

- Variable: To answer yes, requires the variance to be negative .5 or less (ex. -0.5, -0.4, 0.0, +1.2)
- Fixed: To answer yes, requires the variance to be 0.0 or less (0.0, +0.1, +3.0)

Below is the path to look up information related to the Budget fields above.

O:\SHARED\REPORTS\HyperionReports\Management_Reports

Additional Information

Additional Information

Provide requisition justification here

- Flex Labor Variance Targets
- How to access Flex Labor by Job Role Report



UNIVERSITY OF VIRGINIA HEALTH SYSTEM

Steven Snyder | Home | Resources | Sign Out

Search Candidate

Advanced Search Query

Recruiting | Tasks | Requisitions | Candidates | Offers | Libraries

New Requisition

Requisition

Save Save and Close Cancel

Show fields required to: Save

3. Job Information

Profile

* Employee Status: Regular

* Schedule: Not Specified

* Shift: Not Specified

* Standard Hours: Not Specified

Hard to Fill? Not Specified

Active Recruiting? Not Specified

Compensation

Pay Grade: 202

Pay Basis: Hourly

Currency: US Dollar (USD)

Minimum Salary: 25.8

Midpoint Salary: 34.25

Maximum Salary: 42.7

Other

No changes to this section



Key Taleo Changes

Sample Completed Requisition





Recruiting | Tasks | Requisitions | Candidates | Offers | Libraries

RN Clinician 2 (21650)

Requisition 21650
 Status: Draft
 Status Details: N/A

Candidates for this requisition: 0

Activated Languages: English (Base)

Requisition Type: Professional

Hired Candidates: 0 out of 1

Department: MICU

Primary Location: Main Hospital

Recruiter: Goelner, Jody

Hiring Manager: Carpenter, Richard

Save Save and Close Cancel

Show fields required to: Save

1. Requisition Structure

Identification

Posting Title: RN Clinician 2 Position Number: []

Structure

Edit

Organization
 UVAMS UVA Health System
 UVAMC UVA Medical Center
 Level 3 A/P for Hospital & Clinics Ops
 Level 4 Patient Care Services
 Level 5 Adult Critical Care

Primary Location
 State: Virginia
 County: Charlottesville City
 City: Charlottesville
 Work Location: Main Hospital

Job Field
 Category: Registered Nurse

Department: 2062000 - MICU



Requisition

RN Clinician 2
21650

Status: **Draft**
Status Details: N/A

Candidates for this requisition: 0

Activated Languages
English (Base)

Requisition Type
Professional

Hired Candidates
0 out of 1

Department
MICU

Primary Location
[Main Hospital](#)

Recruiter
Goelner, Jody

Hiring Manager
Carpenter, Richard

RN Clinician 2 (21650)

Requisition

Save Save and Close Cancel

Show fields required to: Save

Owners

Recruiter
Goelner, Jody M

Hiring Manager
Carpenter, Richard M

Collaborators

Modify Add Frequent Collaborators

First Name	Last Name	Email	Title
Andrea	Caulfield	1-alc2by@hcomail.mcc.virginia.edu	
Richard	Carpenter	1-mcc5m@hcomail.mcc.virginia.edu	Nurse Manager
Joel	Anderson	1-jra6d@hcomail.mcc.virginia.edu	
Thomas	Saul	1-tp5g@hcomail.mcc.virginia.edu	

2. Process

Candidate Selection Workflow



Requisition

RN Clinician 2
21650

Status: Draft
Status Details: N/A

Candidates for this requisition: 0

Activated Languages
English (Base)

Requisition Type
Professional

Hired Candidates
0 out of 1

Department
MICU

Primary Location
Main Hospital

Recruiter
Goelner, Jody

Hiring Manager
Carpenter, Richard

RN Clinician 2 (21650)

Requisition

Save Save and Close Cancel

Show fields required to: Save

2. Process

Candidate Selection Workflow

Candidate Selection Workflow
IWA.CSW

Budget

Request Information:

Type of Position
Variable Position

New/Replacement Position
New Position (Job code already exists in de)

Justification Reason
RN Resignation. The MICU is currently running at capacity (since 6/6/16) and volumes are consistently above budget. RN orientation has markedly effected our budgeted FTEs and will

Is this a replacement of a probationary employee or employee terminated for cause?
No

Replacement For
Mary Smith

Separation Date
Dec 3, 2016

Month-Total Worked FTE
Job Role-Variance (Flex vs. Actual): Department Total-Variance (Flex vs. Actual):

Sample - Completed Requisition



Requisition

RN Clinician 2
21650

Status: Draft
Status Details: N/A

Candidates for this requisition: 0

Activated Languages
English (Base)

Requisition Type
Professional

Hired Candidates
0 out of 1

Department
MICU

Primary Location
Main Hospital

Recruiter
Goelner, Jody

Hiring Manager
Carpenter, Richard

RN Clinician 2 (21650)

Requisition
Show fields required to: Save

Save
Save and Close
Cancel

Month-Total Worked FTE
Job Role-Variance (Flex vs. Actual): 2.6 1

Year to Date-Total Worked FTE
Job Role-Variance (Flex vs. Actual): -4.53 3

Supported by Budget:
Is this FTE supported in your Monthly job role variance? 1
Yes

Is this FTE supported in your YTD job role variance? 3
No

Is this FTE supported by the Flex Labor Variance? No

Department Total-Variance (Flex vs. Actual): -36 2

Department Total-Variance (Flex vs. Actual): -63 4

Is this FTE supported in your Monthly department variance? 2
Yes

Is this FTE supported in your YTD department variance? 4
No

*NOTE: If the answer to any of the four budget variance questions is NO, you must answer NO to this question.

Flex Labor Variance Targets:

- Variable: To answer yes, requires the variance to be negative .5 or less (ex. -0.5, -0.4, 0.0, +1.2)
- Fixed: To answer yes, requires the variance to be 0.0 or less (0.0, +0.1, +3.0)

Below is the path to look up information related to the Budget fields above.

O:\SHARED\REPORTS\HyperionReports\Management_Reports

Additional information

Additional Information

FTE supported by the current month job role and department flex variance but not in the YTD month and department flex variance. We experienced a loss of 2.7 RN FTEs in the last 30 days. Recent new hires will not complete orientation until January by which time we will have six additional



Requisition

RN Clinician 2

21650

Status: Draft

Status Details: N/A

Candidates for this requisition: 0

Activated Languages: English (Base)

Requisition Type: Professional

Hired Candidates: 0 out of 1

Department: MICU

Primary Location: Main Hospital

Recruiter: Goelner, Jody

Hiring Manager: Carpenter, Richard

RN Clinician 2 (21650)

Requisition:

Save Save and Close Cancel

* Show fields required to: Save

Below is the path to look up information related to the Budget fields above.

O:\SHARED\REPORTS\Hyperion\Reports\Management_Reports

Additional information

Additional Information

FTE supported by the current month job role and department flex variance but not in the YTD month and department flex variance. We experienced a loss of 2.7 RN FTEs in the last 30 days. Recent new hires will not complete orientation until January by which time we will have six additional resignations. Additionally the department is operating at full capacity of 28 beds with an average volume of 4.1% over budget since January. YTD Flex report does not demonstrate an accurate picture due to the bed closures and more than 11,000 hours of orientation during the last six months six

3. Job Information

Profile

* Employee Status	* Schedule
Regular	Full-time
* Shift	* Standard Hours
Rotating	36 hours / 0.9 FTE

Compensation



Key takeaways:

Add Flex Labor Variance together for RN Clinical Ladder positions:

- RN Clin 1: 6.15
- RN Clin 2: 4.5
- RN Clin 3: (2.20)
- Total: 8.45

Set Up Collaborators:

- Include everyone in approval hierarchy as a collaborator
- Allows them to see approval status in Taleo
- For assistance, talk to your Talent Acquisition Consultant

Approval/rejection notification:

- The system is unable to notify all approvers of the final decision
- Hiring Manager is notified in Taleo upon each level of approval and when a requisition is denied
- Hiring manager must notify the approval chain when a position has been approved or rejected



Key Taleo Changes

TRAVELERS AND AGENCY TEMP STAFF





Key Taleo Changes - TRAVELERS

CURRENT

Traveler request form submitted manually and routed through email



NEW

Traveler requests submitted through Taleo and approved by LMST



Key Taleo Changes – AGENCY TEMPS (non-clinical)

CURRENT

Email to Talent
Acquisition
indicating Chief
approval



NEW

Requests
submitted
through Taleo
and approved by
LMST



Travelers (clinical):

– RN, Histo Tech, Cath Lab Tech, etc.

Agency Temps (non clinical):

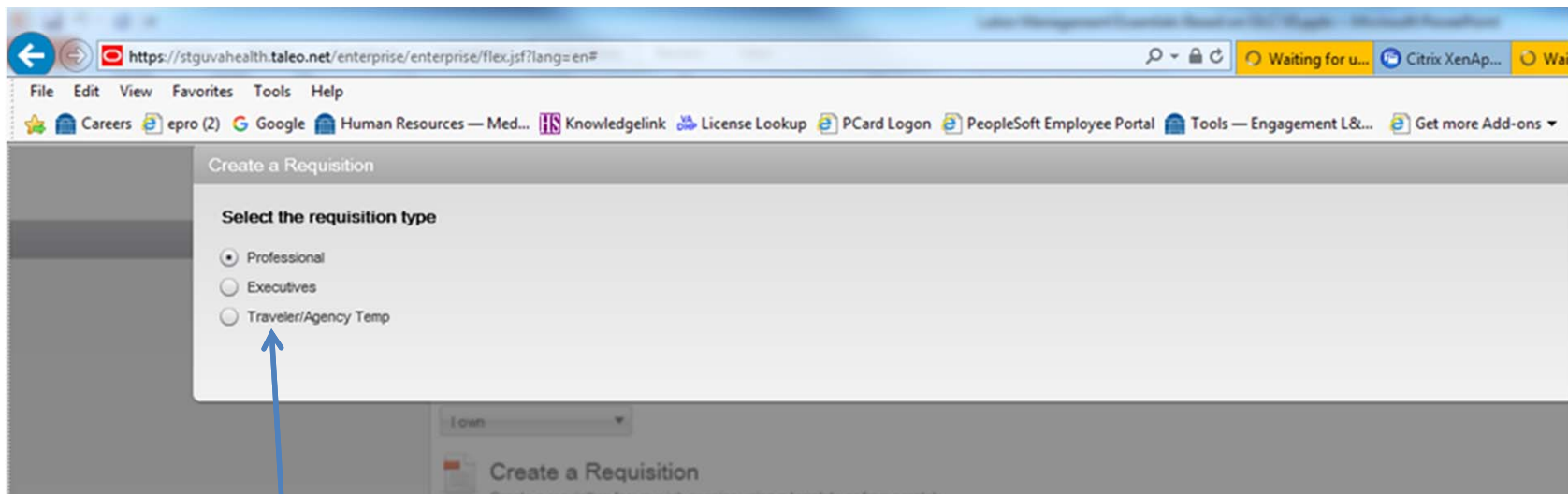
– Administrative Assistant, Access Associate, Inventory Assistant, etc.

Approval Process:





Traveler Request Form



New:
Traveler/Agency
Temp

Traveler/Agency Temp requisition is
the same as the standard
requisition, with additional fields

Traveler Request Form



rise/enterprise/flex.js?lang=en#bhmDID=1066520;bhmPID=requisitionFile;requisitionKey=16881;hireTypeKey=3; ...

in Resources — Med... KnowledgeLink License Lookup PCard Logon PeopleSoft Employee Portal Tools — Engagement L&... Get more Add-ons Welcome Center Workforce Metrics Yahoo

Richard M Carpenter | Home | Resources | Sign Out

Search Requisition

Recruiting Tasks Requisitions Candidates Offers Libraries

New Requisition

Requisition

Save Save and Close Cancel

1. Requisition Structure

Identification

* Posting Title RN Clinician 2

* UVA Job Title

* Justification Not Specified

* Type of Request Not Specified

Structure

Edit

Organization

UVHS UVA Health System
UVAMC UVA Medical Center
Level 3 AVP for Hospital & Clinics Ops
Level 4 Clinical Ancillary Services
Level 5 Radiology and Medical Imaging

Primary Location

State Virginia
County Charlottesville City
City Charlottesville
Work Location Main Hospital

Job Field

Category Registered Nurse

Department 2382000 - Neuro radiology

Drop Down Selections:

- Traveler
- Agency Temp

Drop Down Selections:

- New
- Extension

Traveler Request Form



New Requisition

Requisition ▼
 Show fields required to:

2. Process

Candidate Selection Workflow

* Candidate Selection Workflow
 WACSW

Budget

* Current number of existing staff on FMLA/MLOA

* Current number of staff on orientation

* Departmental vacancy rate including FMLA/MLOA, orientation

* Existing travelers in department?

* If yes, how many and contract expiration date

Month-Total Worked FTE
 Job Role-Variance (Flex vs. Actual)

Department Total-Variance (Flex vs. Actual)

Year to Date-Total Worked FTE
 Job Role-Variance (Flex vs. Actual)

Department Total-Variance (Flex vs. Actual)

Supported by Budget:
 Is this FTE supported in your Monthly job role variance?

Is this FTE supported in your Monthly department variance?

Same information as existing traveler request

See previous slides – same as standard requisition



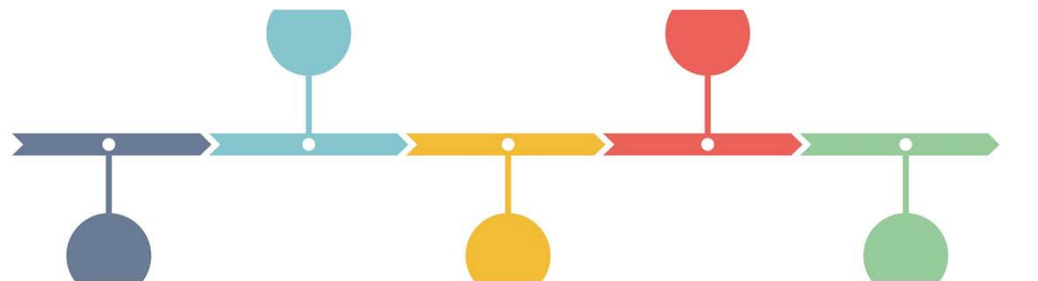
Key Takeaways:

- Traveler requisition is the same as the standard requisition with additional fields specific to travelers
- All traveler and agency temps must go through this process



SUSTAINABLE LABOR MANAGEMENT STRATEGIES

- Preparing for the LMST Meeting





Preparing for LMST Meeting

- Hiring Manager and Service Line Administrator attend LMST
- Chief is optional
- Approximately 5 minutes to discuss the request
- Chief must have already approved
- Complete the template



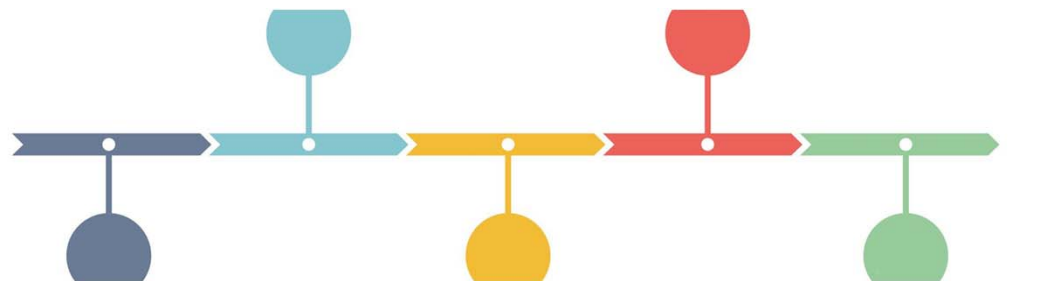
Preparing for LMST Meeting

- See Sample Template



SUSTAINABLE LABOR MANAGEMENT STRATEGIES

- Leader Support and Timeline





Manager Support Resources

On-line resources at:

Knowledge Link: HR\Leadership Tools\Labor Management
<O:\SHARED\REPORTS\HyperionReports\Management Reports>

The following resources are available:

- **General questions**
 - Speak with your manager
- **Flex Variance/Budget questions**
 - Speak to your Finance Consultant
- **Taleo/Process questions**
 - Speak to your Talent Acquisition Consultant



Next Steps:

- Taleo changes effective November 21
- First LMST Meeting: December 2 (due to Thanksgiving holiday)
- A work in progress...anticipate some challenges and adjustments as we refine the process
- Ask questions!



QUESTIONS & DISCUSSION



Appendix



Requests for New or Changed Positions and Role Audits

Date of Request:	
Individual Requesting Review (Name and Title):	
Staff/Management Position:	<input type="checkbox"/> Staff <input type="checkbox"/> Management
Type of Request (check more than one option if needed):	<input type="checkbox"/> New Job Creation <input type="checkbox"/> Revision of current role with market repricing <input type="checkbox"/> Revision of current role without market repricing (Committee approval not required) <input type="checkbox"/> Review of current team member (Role Audit) Team Member Name: _____
Current Job Title (if available):	
Number of FTEs impacted:	
Justification (Include Labor Standards and Variance, etc.)	
Is this a Fixed or Variable position?	
Dollar variance	
Is this covered within your budget?	
Include Budget and Fringe Information	
Reason & Justification for Request	
How are the specific job duties similar and different from current role(s) in the department or organization? What are those roles?	
How are the job requirements similar and different from current role(s) in the department or organization?	
Additional Information:	
Chief Approval:	

Required supporting documents:

- New/Revised Job Codes require submission of proposed job description.
- Creation of a Supervisor, Manager, Director, or above requires submission of current and proposed organizational chart.

Note that the leader or Chief submitting this request will be required to attend a scheduled RAC (Requisition Approval Committee) meeting to provide information and answer questions regarding this request unless the role currently exists and there is no change to the market placement.

All positions and upgrades must be approved by their respective Health System Executive.

Appendix



Template – LMST Position Request: Position Exceeds Flex Variance Target
11/14/16

1. Are you within your Flex Variance Target? (Y/N)

	Current Month:	Year to Date:
Job Role		
Department		

- If No, list the Flex Variance(s) that exceed target?
 - If No, explain variance:
2. Is it possible to absorb or reassign the workload to existing resources within the functional area or within another department? If no, please explain.
3. Are there tasks or functions currently being performed that could be modified or discontinued?
4. **Vacancy:**
1. Current vacant FTE for the job role (approved requisitions):
 2. FTE of traveler/temporary agency staff:
5. **Overtime:**
- What is your average overtime usage the last two pay periods for this job role?
 - Will the position eliminate the need for overtime?
 - What is your part-time and wage/pool staff utilization in last two pay periods?
 - How many team members picked up extra shifts in the last two pay periods?
6. **Is this request the result of an anticipated increase in work volume for your department?**
- If yes, explain
 - Current volume:
 - Forecasted volume:
 - Reason for the change:
 - Anticipated duration of the volume increase?
 - Comment:
7. Will this position result in additional revenue generation?
8. **Additional Comments:**

Appendix



Template – LMST Position Request: Management Position
11/11/16

1. Position is:
 - ___New___Replacement
 - If New, explain why it is necessary:
 - Comment:
2. Is it possible to absorb or reassign the workload to existing resources within the functional area or within another department? If no, please explain.
3. Describe the management structure of the department:
4. How many direct reports does this manager have?
5. Is it a “working manager” (Y/N)
 - What percentage of time is spent in non-management duties?
 - Describe non-management duties:
6. Could the position be filled at a different level (example, Director converted to a Manager)?
7. Who does this position report to?
8. Additional Comments: