AIMS Action Items for Leaders

Session 9:

Topical Areas of Concern

October 26, 2022

Please note: Some of the paths and screen shots shown in MyConnection in this presentation may not be available until after the release of all the functionality.

SHA Treaty Land Acknowledgement

We would like to acknowledge that we are gathering on **Treaty 2, 4, 5, 6, 8, and 10 territory** and **the Homeland of the Métis.**

Recognizing this history is important to our future and our efforts to close the gap in health outcomes between Indigenous and non-Indigenous peoples.

www.saskhealthauthority.ca/trc

Saskatchewan Health Authority

Treaty Territories and Saskatchewan Health Authority Areas

Depictions of Treaty boundaries are subject to variation. These boundaries are usually not surveyed and are estimated based on written descriptions.

This map displays the Pre-1975 Treaties (Historic Treaties) in colour, as provided by Crown-Indigenous Relations and Northern Affairs Canada. The grey lines indicate alternate boundaries compiled from various sources.
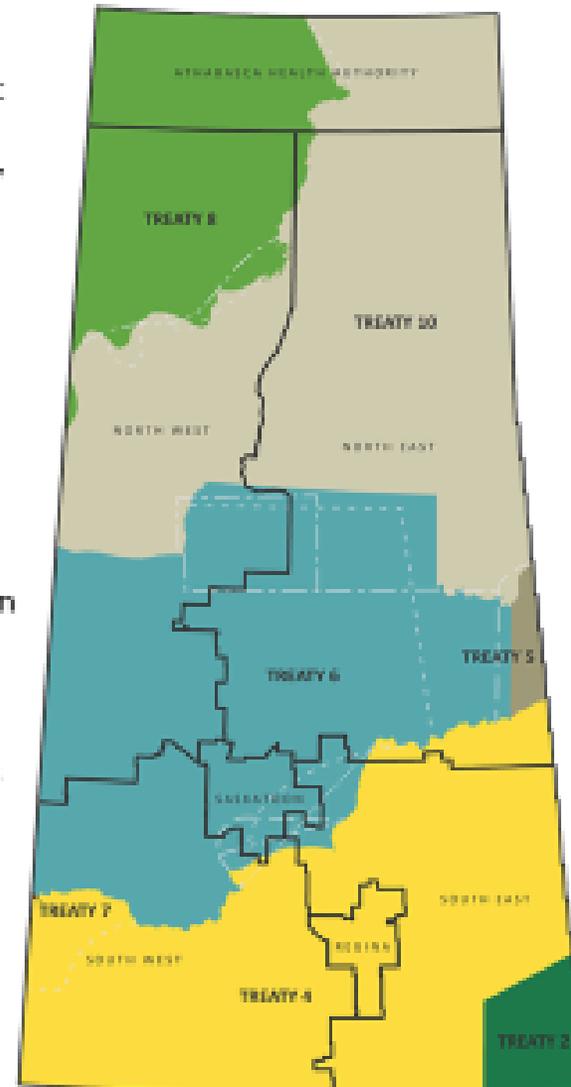
Welcome

Session Topics

	October 26, 2022	**Topical Areas of Concern**
	October 13 to November 13, 2022	**Scheduling Demo and Q and A Sessions**
	November 2, 2022	**Topical Areas of Concern Pt. II**

Session Procedure

- Please submit all questions in the Q and A Chat, which can be found by clicking on the three dots in the lower right hand corner of your screen.

- Questions put in the regular chat will not be tracked.

Helpful Tools – Manager and Employee Checklists

Manager Checklist	Employee Checklist
• Pre-Implementation, Implementation and Post-Implementation Responsibilities	• Before Implementation, During Implementation
• Located in the AIMS Manager's Toolkit. Form here.	• Located in the AIMS Manager's Toolkit. Form here.

New versions of these forms are now available, so please review the current versions in the Manager's Toolkit.

Overview of Today's Session

Learning	Finance
• AIMS Learning Progress • AIMS Learning/Applicable Learning • Charge Nurse Scheduling Learning	• Accounts Payable • Chart of Accounts (CoA) • Reporting and Finance • Signing Authority • Signing Authority Delegation
Human Resources and Scheduling	**Managing Employee Expectations**
• Top Human Resources and Scheduling FAQs • Resetting Your MyConnection Password • Verifying Schedules • Person Numbers • Validating Time Worked • Job Postings • Manual Re-Entries • Annual Vacation • Information transfer to AIMS	• Pay • Scheduling • Supply Orders • Financial Information • Reporting

AIMS Learning

All Employee and All Manager Learning and Engagement

25,000+ employees have now successfully reset their passwords and logged in to MyConnection. 23,000 to go!

**60 min Employee Learning Video
31,403 Unique Views**

**Employee Video – peak days:
September 26: 3,600 views
October 19: 4,000 views**

**On-line Learning Modules for Leaders MGR-00
2392 people completed training (70%)
694 people in progress (20%)**

**On-line Learning Modules for Leaders MGR-01
1440 people completed training (59%)
721 people in progress (30%)**

Human Resources Learning Progress

Module	Target	Not Started
HCM 09 Manage Employee Movement and Separation	259	**48%**
HCM 15 Overview of Benefits Management	51	**37%**
HCM 17 Manage Payroll Data and Elements	118	**25%**
HCM 18 Manage Talent Acquisition and Recruitment	68	**32%**
HCM 20 Manage Jobs, Positions and Organizations	228	**39%**
HCM 25 Manage Payroll Overview	22	**59%**
HCM 27 HR Overview	68	**36%**
HCM 28 Work and Person Transaction Changes	409	**30%**

Scheduling Learning Progress

Module	Target	Not Started
WFM 05 Advanced HR Scheduling	337	**53%**
WFM 06 Assigning Security for HRIS	18	**61%**
WFM 07 Processing Time and Attendance Data Payroll	136	**55%**
WFM 16 Create and Manage Work Schedule WFM	118	**65%**
WFM 18 Create and Manage Work Schedule	336	**40%**

Finance Learning Progress

Module	Target	Not Started
F 05 Manage Invoices and AP Balances	197	30%
F 07 Manage Invoices, Accounting, Balances and Payables Reporting	128	40%
F 08 Manage Payments for AP	33	42%
F 09 Manage Bank Statements	25	32%
F 10 Set up Banks, Branches and Accounts	19	36%
F 11 Cash Forecasting and Reporting for Cash Manager	26	34%
F 13 Asset Configuration, Acquiring and Recording	84	32%
F 14 Depreciate, Transfer, Retire and Reinstate Assets	84	36%
F 16 Updating Currency Rates	34	50%
F 17 Create and Process Journals for GL Accountant	147	31%

Finance Learning Progress

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F 14 Depreciate, Transfer, Retire and Reinstate Assets	84	36%
F 16 Updating Currency Rates	34	50%
F 17 Create and Process Journals for GL Accountant	147	31%
F 19 Advanced GL Management	147	42%
F 20 Report and Inquiry in GL	166	37%
F 21 Manage Project Data Structures for PFM admin (MDM content)	10	40%

Finance Learning Progress II

Module	Target	Not Started
F 05 Manage Invoices and AP Balances	197	30%
F 07 Manage Invoices, Accounting, Balances and Payables Reporting	128	40%
F 08 Manage Payments for AP	33	42%
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Available Learning (All Employees and Managers)

1) **All Employee Learning** should be consumed by all employees, including Managers, as it reviews the every day tasks that all employees will need to know. (Checking pay slips, T4s, applying for leaves, etc.)

All Employee Learning	Demonstration Videos on Individual Tasks
https://vimeo.com/741232134	https://vimeo.com/showcase/9673425

2) **All Manager Learning** should be taken by all Managers, as it contains information on tasks that all Managers will perform on a day-to-day basis.

- MGR-00 Welcome to AIMS for Leaders (focused on orientation to AIMS type information)
- MGR-01 AIMS Overview for Leaders (focused on how to use AIMS functionality for leaders)

Instructions for accessing the All Leaders learning modules:

- Go to MyConnection > MyLearning > Access MyLearning (from the dropdown)
- You will now be in the Student Dashboard of MyLearning > View More Courses
- Search for Welcome to AIMS for Leaders > Select your course > Enroll for Free
- Repeat last step and search for "AIMS Overview for Leaders"

3) **More advanced learning for those whose roles require them to work in the system daily.**

Charge Nurse Scheduling

- With the implementation of AIMS, there will be changes to the way employees are scheduled for both regular and off-hour shifts.

- The Charge Nurse Scheduling Learning offers additional information for those who provide scheduling support in a Charge Nurse or similar role.

Topics Included	
• Replacing Staff • Booking off • Managing open shifts • Call-in lists • Scheduler dashboard • Adding additional staff • Book on additional staff	• Extend current staff • Call-in lists • Unit schedules • View schedules • Validating time • Interim process • Premium hours

- To view this important video, please click here. This video can also be found in the AIMS Manager Toolkit, which can be accessed through:

  MyConnection > Announcements > Managers Toolkit.

Human Resources and Scheduling

Top Human Resources FAQs

Q: How many types of delegations are there?
A: There are three: MyConnection Delegations, Finance-Signing Authority Delegations and Scheduling Delegations.

Q: Can more than one delegate be assigned?
A: Multiple delegates can be assigned for MyConnection or Scheduling delegates. Only one delegate can be assigned for Finance/Signing Authority. You will need to set-up delegates separately for the different types of delegation required.

Q: Who needs to review the learning modules on Scheduling?
A: Any employee who has regular scheduling duties should review the learning modules for Scheduling.

Q: How are additional things such as charge pay, preceptor pay, OT and callback put into scheduling?
A: Employees will be responsible for reporting their time worked to capture premiums within AIMS. This is accomplished by submitting changes through the Time Card & Premium tile in MyConnection. This could include changing the hours worked or adding or removing time from the schedule in the system. Time Card & Premium requests can be completed by following this path in MyConnection:
   MyConnection > MyWork > MyScheduling > Time Cards & Premiums (tile)

Top Human Resources FAQs

Q: How long will the interim time entry process be in place?
A: The interim time entry process will be in place for six weeks after the implementation of AIMS, **for those who will transition to the tap-in, tap-out time entry process**. For those who will continue to validate their time worked by this process, it will remain as the ongoing method of recording time worked.

Q: Will the timecard verification deadline change if a statutory holiday falls on a Monday?
A: Timecards must still be verified by Monday 10:00 a.m. at this time.

Q: Will all locations have Tap-in/Tap-out?
A: All employees who work variable shifts (potentially over six days) will tap-in/tap-out, with there being several ways that they can do this, including at a facility eClock, a facility kiosk, a work station computer, a mobile device or via MyConnection. Not all facilities will have or will require an eClock, as there are alternative ways to tap-in/tap-out beyond the eClock.

Resetting Your MyConnection Password

- Employees will be required to reset their password on the first visit to MyConnection after the AIMS implementation.

- Employees will receive an email with their user name and a direction to enter the username, and then select and confirm a password of their choice to **activate their account**.

- The email received should be saved, as it contains the username that employees will require should they want to reset their password in future.

- The link to activate the account expires after ten days. Should employees not activate their account during this time period, then they will be required to call MyConnection at 1-833-766-4390 to request another activation link.

- The password you will set up using the link provided became active on Sunday, October 23, 2022 at 7:00am MT.

Verifying Schedules Change copy in chart on this slide

Employees should verify their schedule. This functionality will be released according to the following time table.

Employee Access to View and Verify Schedules	
Group A – October 26, 2022	**Group B – October 27, 2022**
- All former Saskatoon Health Region employees - All SHA Out-of-Scope employees using timecards 3sHealth - eHealth - Santa Maria Senior Citizens	- All former Regina Qu'Appelle Health Region employees - All former Heartland Health Region employees - All former Five Hills Health Region employees - All former Cypress Health Region employees - All former Providence Place employees - All former Kelsey Trail Health Region employees - All former Keewatin Health Region employees - All former Mamawetan Health Region employees - All former Prairie North Health Region employees - All former Sun Country Health Region employees - All former Prince Albert Parkland Health Region employees - All former Sunrise Health Region employees - All St. Joseph's Hospital (Estevan) employees - Employees of all non-SHA/non-affiliate legal employers

Person Numbers

- Every employee in the health system has an Employee Number. With the implementation of the Administrative Information Management System (AIMS), new numbers will be assigned that will now be called Person Numbers.

- Person Numbers are one of the many ways you can tap-in, tap-out for electronic time entry.

- The Person Number will be required if you are tapping-in or out by phone or manually at an eClock.

- Employees can find their individual Person Numbers by logging into MyConnection, and following this path:

  MyConnection > MyServices > My Information > Employment Info (tile) > Scroll down until you see your 7-digit Person Number

  This path will not be accessible until October 30, 2022.

  Note: For employees in fSaskatoon, fCypress and Providence Place, the Person Number will be required for QuickDial 1-833-648-0342 for scheduling.

Validating Time Worked

Employees should log in to MyConnection on their assigned date to validate time worked by following this path:

MyConnection > MyServices > Human Resources > Scheduling/Timekeeping > Timecards & Premiums (Tile)

Important: Employees will need to validate their time worked back to October 23, 2022 when they have access to the system, as this is the start of the pay week.

Please refer to Knowledge Base Article KB0011871 for information on verifying time worked and requesting premiums, "Verifying Time Worked." This can be found in the MyConnection Knowledge Library.

Please Note: Managers will only be responsible for verifying changes made by the Employee. Approval will not be required for every employee, only when there are changes to the anticipated schedule.

Job Postings

- Leading up to the implementation of AIMS there was a restriction placed on job postings from October 10 to 30, 2022.

- Hiring is only being considered if necessary criteria are met:
  - If the position was important to the continued operation of the facility
  - Or, if there would be a detrimental impact to the department or unit should the position not be posted.

- Position postings will resume on **November 1, 2022**, with postings being added daily. There will be a brief period of time before all positions will be posted from the restriction period.

Manual Re-Entry in AIMS

Leave Requests

- Any leaves entered into ESP or VIP **will be transferred** into AIMS up to December 3, 2022.

- Areas that **do not** use ESP or VIP **will have to re-enter** all leaves effective October 23, 2022

- Since access will not be available until October 26 or 27, 2022 the leaves will need to be entered at that time.

Trades and Named Replacements

- Shift trades and named replacements **will need to be re-entered** into AIMS after December 3, 2022.

Annual Vacation

- Employees will not be able to submit a request for 2023-2024 vacation until December, 2022.

- Further AIMS functionality will be developed to accommodate these submissions post-implementation.

- Please do not submit Annual Vacation requests through current processes at this time.

Information Transfer from Existing Systems to AIMS

- Scheduling exceptions (i.e. leaves, trades, book-ons, etc.) **WILL NOT** be transferred from existing systems to AIMS past the end of the fiscal year 2022 (March 31, 2023).

- Master rosters/rotations **WILL BE** transferred.

Example

- If a leave request has been approved for an employee on April 1, 2023, this leave will not transfer.

- The employee will need to request this leave again, so it can be entered into AIMS.

Finance

Accounts Payable

Invoices Dated	Submit to
• Prior to November 1, 2022	• Former Region Finance office with existing account coding
• After November 1, 2022	• SupplierInvoices@saskhealthauthority.ca with the new AIMS CoA Coding

Post-Implementation
- Majority of invoices, PO and Non-PO, will be processed in PDF format and will be electronically viewable through your financial reports.
- Purchase order invoices will not require coding or manager approval, because it is provided at time of requisition.
- Non-PO invoices will require coding and approval:
  - Invoices dated after November 1, 2022 will require the new AIMS Chart of Accounts (CoA) Code.
  - Coding can be written on the invoice prior to scanning and sending to Finance. Refer to Knowledge Document KB0013560 for further support.

- Expense reimbursements will be submitted electronically to the Manager for review of permissible expenses and approval.

Accounts Payable – Non-PO Invoice

If the invoice is received directly by the non-accounts payable department:

- Include coding on the invoice and the contact/approver name on the invoice
- Then send to SupplierInvoices@saskhealthauthority.ca for processing
- The invoice will then be sent by Accounts Payable to the SHA contact listed on the invoice for approval.

If the invoice is received directly by the Accounts Payable department:

- The SHA Contact/Approver must be listed on the invoice, so Accounts Payable can send the invoice to them for coding.
- The contact will receive the invoice for coding.
    - **Note: The contact can reassign the invoice to another individual (administrative assistant, in scope supervisor) for coding.**
- Once the invoice is coded it comes back to Accounts Payable for review.
- After review, the invoice is sent to the individual who completed the coding for approval. If the individual who coded the invoice does not have Signing Authority or budget responsibility to approve the expense, the individual should reassign the invoice to the appropriate individual for approval.

Please reference Knowledge document KB0013560 for further information.

Cost Centres/Chart of Accounts

- Coding financial transactions will change, as there will be new cost centre codes as part of what's known as the Chart of Accounts (CoA).

- There will be a tool to help you source a new code by providing previous code information. Log in to [MyConnection](#):

  MyConnection > MyServices > Finance > Legacy to AIMS COA Mapping (tile)

  Please Reference Knowledge document KB0013560 for further information.

Please Note: As part of this standardization, there will be changes to department names.

Reporting and Finance

- Monthly financial statements – no October report, delayed monthly reporting.

- Budget detail – EPM (budget module) is not implemented until January 2023, detailed 23/24 budget reports will be delayed, still working through options.

- Detailed initiative reporting (i.e. Mental Health and Addictions, Surgical Initiative, HHR 250 Position) – these financial reports will be delayed. Manual workarounds for reporting will be developed in the interim.

- Paid Hours/Paid FTE reporting (detailed compensation reports), there will only be actuals reported for the 22/23 fiscal year due to the lack of 22/23 budget detail in AIMS.

Signing Authority

Saskatchewan Health Authority (SHA) and Non-SHA Organizations Signing Authority

- Individuals with Signing Authority have approval to commit the organization to either financial or non-financial expenditures.
- In general, for an operating spend, the budget owner will have Signing Authority and for a capital spend, the project manager will have the authority.
- Roles determine how much financial authority is given to an individual, with this value not being standard across organizations. However, Signing Authority policies may vary between organizations.

Changes to the Saskatchewan Health Authority 'Signing Authority Policy' at AIMS implementation:

- Only those who are Managers or above will be able to approve expenditures in AIMS.
- Only one Manager, Director or above can be responsible for approving purchases for a Cost Centre. There can be a temporary delegation to another person at the same level or above should the delegate be temporarily unavailable (i.e. vacation).
- All approvals of expenditures will occur within AIMS. A notification will be sent, and the individual can then review and approve an invoice within AIMS.

For more information on delegating Signing Authority, please see KB0011821 on "Delegating Approvals and Setting an Absence Rule".

Signing Authority Delegation

- Leaders are able to delegate their signing authority to a peer (same level), i.e. Manager to Manager, Director to Director, for any planned absences

  - Delegation occurs within the system
    - Use the 'Delegate To' option found in My Rules
      - This is accessed through the MyWork tab in MyConnection.
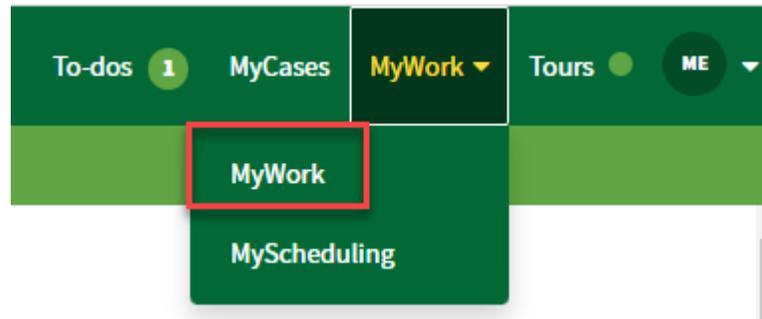
Please Note: Signing Authority can no longer be delegated to a direct report.

Leader Responsibilities

Making Sure Employees Get Paid Accurately

- Need to ensure that employees view and validate their schedules

  - See Knowledgebase Article KB0011871 for information on verifying time worked and requesting premiums, "Verifying Time Worked."
  - See Knowledgebase Article KB0012348 for information for Manager's on "Verifying Time Worked and Premiums for the Manager or Delegate."

- For any scheduling issue prior to the implementation of AIMS, the correction would need to be submitted through a case in MyConnection.

  - MyConnection > MyServices > Human Resources > Scheduling & Timekeeping > Scheduling Inquiry

Managing Employee Expectations

- Managing expectations surrounding such a large scale change is important. We ask that you and your staff recognize that we are going to get most things right; get some things wrong; and we will rely upon our quality improvement mindset to continually improve the processes and services once stabilized.

- We need to rely on each other to work through items that go wrong and be patient as we overcome those challenges. Issues upon AIMS implementation may result in:

  - Some employees being paid incorrectly,

  - Some employees being scheduled incorrectly,

  - Potential for supply orders being missed,

  - Incorrect financial information (like payments to vendors),

  - Reporting limitations as data stabilization needs to occur and staff need time to stabilize the system before they can perform more routine functions.

- It is a certainty that there will be errors and issues at a level greater than we experience today until the implementation is stabilized.

Implementation Duties

There will be challenges with this implementation. As a Leader, your employees will look to you to support them through this transition. Without your active participation, it will be difficult to realize the end of goal of creating a consistent experience across the health system with standardized processes, and the ability to source information centrally to inform good decision making.

- Understand the information provided

- Know your responsibilities as a leader

- Share with employees your knowledge of what has been shared with you

- Support your employees in this significant transition

Questions