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Q and As: Oct 19, 2022 Action Items for Leaders – Finance Session

Question	Answer
FINANCE	
What is used for journal approval dollar limits?	The dollar value is based on the journal header amount.
If I filter Accounts Payable (AP) invoices by type (PO, NPO, Pre, etc.) and select "Save and Edit Another" will the next invoice be related to my filter?	Yes. If you filter the invoices, then you "Save and Edit Another" after finishing an invoice, the system will bring up the next invoice in your filtered list. If someone else is accessing that invoice or there is an error, then you will receive an error prompt and will need to open a different invoice from the invoice dashboard.
Can an administrative assistant submit expense and mileage claims for managers and directors?	For non-mileage Expense claims, A Manager can delegate to an administrative assistant to complete an expense report. Once done, it will return to the Manager, who will review it for correctness and completeness, and will submit it. Mileage claims are submitted separately through a tile on MyConnection. Administrative Assistants will need to be deemed a delegate via MyConnection. For more information please review the Action Items for Leaders Session from October 12, 2022 - Setting a MyConnection delegate.
How do Managers submit invoices to Accounts Payable (AP) from local vendors that send invoices to the local leader and not directly to AP?	For non-Purchase Order (PO) invoices dated November 01, 2022 and later, please submit to SupplierInvoices@saskhealthauthority.ca.
Will AIMS result in standardization of where items are coded within a portfolio, e.g. When there are two different departments in the same portfolio, but may code items differently?	Yes. The coding would become standardized between the two different departments.
For staff who claim professional association dues reimbursed by the SHA, will they submit these after the November 01, 2022 restriction period?	Professional fee reimbursements will be processed through payroll at implementation. There will be a tile in MyConnection to submit this expense.
Does the expense claims restriction period include mileage reimbursements?	The cut-off for the submission of mileage claim reimbursements is October 24, 2022.
I receive invoices from many areas: finance, vendors directly, some staff that receive them, by mail. Have all vendors been notified to send directly to finance?	A letter has been sent to major vendors requesting that non-Purchase Order (PO) invoices continue to be forwarded to the current contact on file.

If an employee is submitting a reimbursement for some purchases they made, do they need to know the cost codes when they initiate the reimbursement, or can they start it and then it can be sent to the office supervisor to code, then forwarded to the manager to approve?	There are drop-down menus for expense types and account codes in the employee expense claim module.
Where do we send invoices to be uploaded?	For non-Purchase Order (PO) invoices dated November 01, 2022 and later, please submit to SupplierInvoices@saskhealthauthority.ca.
What is the process when an invoice is received directly from the vendor to the operational department? Do we add the coding to the invoice before forwarding it to Finance?	Yes, the invoice can be coded and forwarded to Finance. Finance will enter the account code and it will be returned to the approver for electronic approval.
What if an invoice gets broken down to multiple cost centres?	In the case of an invoice where the total amount is to be allocated out, you will need to enter multiple lines when the invoice is being processed to assign the correct amount to each cost centre
Will we get notified per department what our new cost centre numbers will be?	No. You will need to go into the Legacy Chart of Accounts (CoA) Mapping tool in MyConnection and determine this.
I don't see access to "Finance" under my services in MyConnection. Will I have this access only after the AIMS implementation?	You will be able to see this as of November 01, 2022.
Do we send the invoice with or without coding?	You can send the invoice with coding or without - but we typically would recommend with coding.
For pre-approved contracts with vendors where there are automatic payments, what is expected of us? Will Finance continue to make payments according to contractual agreement in place? As per current practice?	The finance group has been working to capture these types of recurring payments to get them set up for AIMS processing going forward. The Saskatchewan Health Authority (SHA) processes large volumes of payments, so continuing to track these would ensure that none are missed in the initial stages.
Is the invoice date a standard dd/mm/yyyy format?	AIMS uses MM/DD/YYYY format.
Is coding required per line item for vendors like Sysco that may have 100 items?	Sysco invoices will have to be coded and summarized before being entered into AIMS, then initiated for approval.

My colleague and I share rural Lab/DI sites, and will frequently cover for each other when absent. • **In order to delegate Signing Authority to each other, or another Lab/DI manager in AIMS, will that manager need to have Signing Authority listed in the SHA database?** • **The rural sites are split into hard/soft reports. Typically, we will each sign for purchases.**	The Signing Authority database was a temporary fix to house provincial Signing Authority for several legacy systems. It will not be used to track Signing Authority for AIMS. AIMS will have one Manager set up to receive invoices for approval for each cost centre. If that Manager is away, then it can be delegated to a peer.
Typically, we will each sign for purchases related to our own "departments", Lab vs DI. My colleague will sign Lab special orders and I will sign for DI Special orders. I note that it says only one manager can be responsible for approving purchases for a cost centre. Will this affect how we currently split the responsibilities? Will I need to approve lab orders for my hard reports sites, or will the cost centres for Lab and X-Ray be different for all sites?	You should likely talk to your Finance Business Partner as all managers will have Signing Authority according to policy. However, splitting budget responsibility may be difficult.
How do you approve an invoice that is not associated with a Purchase Order (PO) number but received from the vendor for payment?	The invoice learning modules review how to process non-PO invoices such as these. You would need to provide the invoices to Accounts Payable (AP) as noted in the learning with the correct coding included.
Currently, we complete invoices on pre-printed 2-part NCR paper. One copy goes to the patient and one to Finance Accounts Payable (AP). Are we now required to enter all invoices electronically through MyConnection, or is this for areas that are requesting Finance to create the invoice only?	Please submit the request through MyConnection and attach the invoice.
We are applying for a new P-card for my department in Saskatoon. Should we wait to apply for a department P-card until after November 14, 2022, or would you prefer we submit that new request before?	You can apply for a P-card after November 01, 2022 using the P-card application tile in MyConnection.
Where is the tool with the codes?	The tile for cost centre codes isn't available yet in AIMS, but will be available when the new system is implemented. You will find it in MyConnection > MyServices > Finance.

Are we still able to manually create our internal Purchase Orders (POs) for medication through distributors? They require a PO on each order. These are not done through Supply Chain.	The manual PO issue has to be clear. If Supply Chain is not issuing a PO, the information provided to the distributor to put on the invoice must have the department and/or person's name that is ordering so that the invoice can be distributed. Otherwise, Accounts Payable (AP) will not know where to send the invoice. The preference is to stop this practice as soon as possible so that reconciliation is not a problem.
If all pharmacy medication orders do not go through Supply Chain, are we still coding manually in Pharmacy and sending to Finance? Invoices come to Pharmacy to receive the drugs.	Any non-system PO invoices will need to be coded and sent to Finance for payment.
Where do we send paper invoices to be uploaded so we can then approve through AIMS?	For non-Purchase Order (PO) invoices dated November 01, 2022 and later, please submit to SupplierInvoices@saskhealthauthority.ca.
Can the coding be delegated as currently done?	Yes. The coding can be delegated.
Can Admins code invoices on behalf of their leaders? If yes, would the leader have to delegate each invoice for admins to code?	Yes. If the invoice is sent to approver, the Knowledge Base Article "Process Non-Purchase Order Invoices without Coding" (KB0012047) in MyConnection, demonstrates how approvers can delegate to Admins for coding. If it is desired that non-PO invoices be sent to Admin initially, the Admin would need to be listed as the SHA contact on the invoice.
When a person is in the process of entering the "distribution combination" into that pop up window, can they navigate to the tile to find the right code numbers without having to exit the pop up window, i.e. have two tiles open at same time?	When you select the drop down arrow after each segment you can search by description or value.
Will there be a change to contract nursing invoices being processed within AIMS?	Changes will be required to align with submitting and approving invoices in AIMS. The invoice learning modules review how to process non-PO invoices such as these. You would need to provide the invoices to Accounts Payable (AP) as noted in the learning with the correct coding included.
We send out invoices for ROIs. Will this be the process we have to do now for currently we create an invoice and send with the information?	All invoices for SHA must be sent out by the SHA's Accounts Receivable Department. The Customer/Billing Inquiry Tile in MyConnection should be used.
Can in-scope office coordinators still complete these drop downs and then send to manager to approve or deny?	Yes. The coding can be delegated

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We bill SAIL. Is this the process we would need to follow?	Yes. The Customer/Billing Inquiry Tile in MyConnection should be used.
We invoice patients and other third parties for release of information requests currently on paper invoices and send to Finance. Are we required to now have staff do the invoice directly in AIMS?	All invoices for SHA must be sent out by the SHA's Accounts Receivable Department. The Customer/Billing Inquiry Tile in MyConnection should be used.
How will "Charge To" be handled when AIMS is implemented, i.e. hours of work are scheduled in my department but I need to charge the time to another department for budget purposes?	Time will be expensed to where it is scheduled. The GL team is unsure whether time worked can be specified to another department if they do not hold a position there. However, for any regular allocations, wage transfers, etc. that the GL team is made aware of, they will be reviewed and assessed on whether they continue. Leaders should continue to fill out the former region's forms for adjustments to where time is recorded.
How will honorariums be paid out?	Honorariums will be paid through Accounts Payable per the current process but need to be flagged. Please send these to PromptInvoices@saskhealthauthority.ca
We have petty cash in HI for ROI and sometimes we need to break a larger bill for change. Do we have to put a request in to the SHA treasury for this or still send it to our local Finance department?	Please continue to work with your local Finance department if you need change in the future.
AIMS LEARNING	
How do we sign up for the daily Scheduling demos?	https://www.aimsproject.ca/learning-webex-calendar
Can the WFM modules be put under the "Important Links" in MyConnection?	These are assigned through MyConnection > MyLearning > Access MyLearning and cannot be accessed via a public link.
For unit staff that order supplies, printing forms, paper, Grand & Toy, is there training for them somewhere?	Please review these FAQs in MyConnection with the Knowledge Base Number, KB0011822. This has been created by the Supply Chain Management team to provide guidance and information on this issue.

This is a question I have received from an employee on a leave - "I wanted to reach out and ask a question regarding the AIMS implementation. I continue to get emails and texts about required actions. Does this apply to me? Is there something I should be doing to ensure when I come back that the transition is seamless?" They would not be expected to do any training until they come back from leave, correct?	Employees will need to be able to work within AIMS upon their return to work. When they complete the AIMS Learning materials will depend on when they plan to return.
Will a request be required by the Manager for office supervisors to access the Supply Chain Management (SCM) training?	Yes. If you believe employees are missing SCM learning, a request from a manager is required. Please submit an inquiry on MyConnection. You can submit this by clicking MyLearning then Questions about MyLearning.
HUMAN RESOURCES	
Re the checklist - are staff to print 7 years of paystubs? Is there a way to batch print them?	Staff are not required to print off 7 years of paystubs. They can print any paystubs they have not previously printed or saved in the past.
Is there still going to be a place or email sent that consists of all the new job postings to be printed and posted as per CBA?	This will be located on MyConnection upon the AIMS implementation.
How do employees confirm that their information in MyConnection is up-to-date?	You will be able to confirm your employee information through MyConnection effective October 30, 2022 and onwards: MyConnection > MyServices > My information > Contact Information (tile) OR Update Personal Information (tile)
As a manager, is there somewhere we can go currently to confirm names of employees are under us (i.e. multiple managers throughout IRH manage a number of staff. How do we confirm that the correct staff names are currently under the correct manager within our group?)	This will have to be confirmed after AIMS is implemented as the data is being transferred to the new system.

How are people getting texts about this? I don't receive texts and am uncertain which link people are referring to.	These are being sent out through the SHA broadcast functionality. You may have disabled notifications through the SHA staff scheduling website or have incorrect contact information in Gateway Online. Pleasure ensure that you have the correct contact information in Gateway Online.
When will all of the Finance, Scheduling, etc. tiles become available to managers on MyConnection?	The tiles will show in MyConnection when AIMS is implemented.
The employee checklist is too broad in regard to input of vacation into legacy systems. Can the December 03, 2022 cut-off date be added to the checklist?	Additional information will be coming out regarding leaves, trades, named replacement, and annual vacation.
How long will we be able to access the current systems for information purposes, after AIMS is implemented?	The legacy system applications will eventually sunset (turn off) over the following years after AIMS is implemented. However, this will vary from application to application. Access to some of the legacy systems will continue to be available for employees and business users to view information that is required for post-AIMS implementation work.
PAYROLL	
There's an error on the employee checklist with the date of expense claim submission.	That checklist relates to expenses paid through payroll (i.e. mileage). Meals, hotel, etc, are paid through Accounts Payable and the restriction period for that began on October 18, 2022. Payroll (HR) may be accepting expense claims that are paid through their system on October 24, 2022, however, finance has a restriction on expense claims until November 01, 2022.
Staff who submit travel/meal expense claims are confused why Payroll is still accepting mileage claims to October 24, 2022 at 10:00a.m., but the Finance cut off for expenses i.e. meals was cut off October 17, 2022?	The checklist you are referring to refers to expenses paid through payroll (i.e. mileage). Expenses paid through Accounts Payable (travel/ meals) had a cut-off of October 18, 2022.
The expense claim restriction period is October 18, 2022 to November 01, 2022, but the employee checklist says October 24, 2022.	Restriction dates depend on the type of expense and where they are paid from - mileage/cell phones through payroll have a cut-off of October 24, 2022; those through Accounts Payable have a restriction period of October 18 to November 1, 2022

Will all of our payroll codes remain the same?	No. All payroll codes will change with the implementation of AIMS. The "Legacy to AIMS CoA Mapping" tool in MyConnection > MyServices > Finance will have the mapping from old to new coding.
REPORTING	
Is this system replacing Enterprise reports?	Yes it will.
When will Year-to-Date (YTD) actual information be complete and up-to-date? How are we going to know where we are financially without YTD numbers?	The process to load the remaining YTD actuals will happen following the AIMS implementation. The plan is to have all the data converted by mid-December.
Are we able to drill down on our financial statements?	Yes. You will be able to drill down to the details.
Will we continue to have access to past reports in Enterprise?	Yes. Current users of Enterprise will continue to have access for historical reports.
SCHEDULING	
Please clarify the difference between when to use the security access form and when to use the delegate request form. It is not clear on the work standard.	Delegate should be used for temporary access. The security form should be used for permanent access. There is also a check box for ‘permanent’ on the delegate form, so that can be used as well. Once AIMS goes live, these forms will be converted into a single tile on MyConnection.
Should all managers automatically have access to scheduling, or does my director need to fill out the security access form for me to have access? Also wanting to confirm that I would need to fill out the security access form for my assistant manager, or should she already have access?	All managers should have access to the departments they manage. If you are not the primary manager or have a dotted line relationship, you may have to request access via the security request form. You should fill out the form for the assistant manager.
If an admin needs to be a manager delegate to approve/deny leaves, should we grant them manager access on the security form or on the delegate form?	You can use either form to grant permanent access.
For fRQHR can we replace shifts via VIP until October 26, 2022 and then we start using AIMS on October 27, 2022?	Correct. fRQHR will start using AIMS on October 27, 2022 for scheduling.

Do we need to complete the AIMS scheduling security access form if we have staff that submits unplanned leaves and replacement instructions to central staff scheduling (Saskatoon)?	No. This would continue to be done through QuickDial.
Is the QuickDial number to be used by all SHA employees, province wide?	QuickDial will be used from the week of October 23, 2022 for fSaskatoon and fCyrpess on HR Staff Scheduling. All areas will use QuickDial for Tap in/out in December, but will not have access to the advanced features unless they are in fSaskatoon and Cypress.
Am I to understand that after filling out the security form early last week, I now need to refill the 'new form' debuted on the October 13, 2022? I currently have 10 seniors in charge of scheduling who are awaiting security access.	There is no need to submit a new form. The old form should be sufficient.
I do not directly manage 3 departments in my facility. Will I be able to see their schedules so that I know when we are working short?	You will need to be set up as a delegate to view schedules.
If an employee is relief in 3 different departments, will I be able to see her schedule in the other departments/areas so I do not book her on the same date?	You would be able to see that she is not available but you would use the call-in list from the system. That will filter out your employees automatically if they are working somewhere else. The system will not let you book someone in, if they are working somewhere else. I would also encourage everyone to attend the Scheduling Q&A sessions that happen daily, where we answer and demo this process.
Will Unit Scheduling departments be required to upload any pre-approved employee leave requests prior to the AIMS implementation?	If your department currently utilizes ESP or VIP AND enter these leaves in to these systems, pre-approved leaves will be captured in AIMS up to December 03, 2022.
How will we know if the people that we inputted on the scheduler access security form actually have that access, for the AIMS implementation?	Your case should be closed in MyConnection. We also ask all staff log in to MyConnection when AIMS is implemented to confirm access.
Do Directors need to submit the scheduling security access request form for existing managers, or should this form be submitted by managers for their existing employees requiring access?	Managers will receive the appropriate access. No form is required.

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What about pre-approved leaves for departments on unit scheduling prior to AIMS? How will these hours be validated?	If a pre-approved leave has been entered in to ESP, VIP, or iHRIS it will transfer over to AIMS. If they are not entered, they will either need to be re-entered or re-requested within AIMS.
Will I be able to track overtime and the reason, as I'm able to access this on VIP right now?	Overtime will be calculated via the AIMS system and will be captured on an Overtime report. Overtime reasons are not available.
SUPPLY CHAIN MANAGEMENT	
Can in-scope supervisors who do this ordering now be allowed to continue to do this with delegation approval?	As long as they have been added as requisitioners, they will be able to enter a requisition in the system.
How do we submit designated staff for Supply Chain Management access?	An email was sent out on Friday, October 14, 2022 from Kristie Mamer to Supply Chain employees.
I order stationery supplies via Grant and Toy. Will that remain the same or change?	The Grand and Toy process will remain the same.
I have external vendors asking me for the new Purchase order (PO) number that they will need after November 01, 2022. How do I know what PO number to provide?	There is no way to generate PO numbers without a requisition.
TAP-IN, TAP-OUT / ELECTRONIC TIME ENTRY	
If I manage a team that is 3.5 hours from me will the tap in and tap out cards be delivered to my office or the facility where the employees are located?	It would be delivered to your office, and you would need to distribute it to your staff.
Will Out-of-Scope (OOS) staff be receiving tap cards as well?	OOS employees will not be Tapping in/out, but will need to validate their time weekly through MyConnection.
Should all sites have received eClocks for tap in/tap out by now? If we haven't received, who do we contact? No cards have been received.	Not all sites will receive eClocks, and cards will take up to 2 to 3 weeks to be delivered to all sites starting this week.
Many of our sites (PHC) were informed we are not getting eClocks. Would staff still require tap (prox) cards (which were delivered on October 19, 2022)?	Not all sites will have an eClock. Staff can also tap-in/tap-out via a computer, or mobile device. The person number on your tap card will be used to complete this process.

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How are tap in/out cards distributed if a Manager and staff working from home? Will they be dropped at their home department, e.g. Academic Health Sciences in RGH.	The tap cards will be delivered to an office. Tap Cards are one of many ways that staff can Tap in/out for work. This includes going to Myconnection, using personal mobile device, or calling a toll-free number. All of which don't need a tap (prox) card.
Should we have received our tap cards already?	All sites should receive tap cards by the middle of November 2022.
What do I do if I did not receive the text being discussed in the Q&A and no tap in/out cards for staff?	Texts are sent through broadcasts. You may have disabled notifications through the staff scheduling website or have incorrect contact information on Gateway. Cards are just being distributed, please allow 2 to 3 weeks for delivery.
Where do we order time clocks?	Time clocks can be requested via MyConnection > MyServices > Support for MyConnection > Other.
My managers have not received tap cards for all of their employees (i.e. many are missing). Are there more coming or do we instruct the employees with missing cards to make the request on MyConnection?	Many tap cards are still in transit. Please wait two weeks to determine if you are missing tap cards. Employees missing tap cards at that time should submit a case in MyConnection. FAQs on tap cards can be found in the October 19, 2022 edition of SHA Leader Resources and in the Manager Toolkit.
So if there is no QuickDial for employees outside of fSaskatoon and fCypress, do employees call their old scheduling number? Or do they only submit their request to be covered when example, sick, and call their manager?	Employees will continue to call their old scheduling numbers.
For Managers who cover all of the INH for an area, how will those tap cards be distributed?	Tap cards will be distributed to the managers work location. Employees tap cards will be sent to their "home unit" manager.
I have one in-scope employee and the rest are Out-of-Scope (OOS). Will she be on a tap in/out method? Would she have received any information directly regarding this?	Your in-scope employee will be utilizing tap in/tap out.

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We have a number of staff in a leased building, i.e. it doesn't belong to us. We thought we weren't getting a time clock in this building because the building is not owned by the SHA. But we received tap-in/tap-out cards for those staff on October 19, 2022. Should we be requesting a Time Clock?	Time clocks are not needed/required for every building. Employees can tap-in/tap-out via a computer or mobile device. Since employees can work in multiple departments, they may be able to access a time clock in another location. The tap (prox) card contains your person number which is needed for tap in/tap out using a computer or mobile device.
Are the cards sent for specific employees or generic and their information linked to the card electronically?	Tap (prox) cards are specific for each employee.
TIME VALIDATION	
Will employees be required to validate their hours during a week of vacation leave? Or will the manager/delegate be required to validate on their behalf?	Once the leave request is approved, time does not need to be validated while the employee is away. Approval would be the validation.
For the fRQHR, as we are replacing shifts in VIP until October 26, 2022 and AIMS will be implemented on October 27, 2022, will our staff have to validate their time for October 23, 24, 25 and 26 in AIMS, or just on October 27, 2022 and onward?	Staff will need to validate time from October 23, 2022 onwards, when they get access to the system on October 26 or 27, depending on when they get access.