Vendor Workflow- Submit a Bill Only Requisition in Workday

Access the Supplier Portal

1. Log into the Workday Supplier Portal using your credentials.
    - Use this link to login- https://identity.workday.com/auth/login
    - If you don't have an account, submit a request via the Jira Service Desk here:

      https://jsd.carilionclinic.org/servicedesk/customer/portal/7/create/641

2. Click **Supplier Portal.**
3. Click on **Customer Directory** from the left-side menu.
4. Select **Carilion Clinic** in the middle of the page.
5. Click **View Purchase Orders.**

Create the Requisition

1. In the search box at the top of the page, type *bill only*.
2. Click **Enter** to search.
3. Click the blue **Create Requisition** button.
4. Enter applicable information in all required fields:
    a. **Company**- Use this crosswalk:

CP01	CRMH, CRCH
CP02	New River Hospital
CP03	Giles Hospital
CP04	Franklin Hospital
CP05	Rockbridge Hospital
CP06	Tazewell Hospital

    b. **Ship To**- Will auto-populate based on the company you selected.
    c. **Department**- Type "*cc*" and click **Enter** to populate all options. Open this Cost_Center_Crosswalk.xlsx to find your department.
    d. **Entered By**- Type your own name.
    e. **Procedure Date**- Choose the procedure date.
    f. **Procedure Number**- If you know the procedure/case number, free text it in this field. If it is unknown, type "*N/A.*"
    g. **Medical Record Number**- Enter the patient's MRN.
    h. **Physician ID**- Free-text the name of the physician.
    i. **Procedure Verified By**- Six name options will populate when you click in the field. Choose the name that correlates to your area:
        - **Jennifer Sutphin**- OR
        - **Kristina Fralin**- OR
        - **Daniela Hofer**- OR

          Choose any of the three names for the OR- this helps distribute the approvals evenly.

- **Jessica Martin**- RMH/NRV Cath/EP
- **Terresa Odum**- RMH/NRV Cath/EP
  Choose either name for Cath/EP.
- **Leah Britton**- IR

j. In the **Goods Line** section, type your item SKU in the **Item field**. Click **Enter** to populate. ***NOTE****: If you know that people often have a difficult time ordering your items by your SKU because of dashes or periods, try entering your* SKU *in different formats in the item field*.
   - Include the **Lot Number** and **Serial Number**.
   - If your item does not exist, or you notice that the item price listed is incorrect, submit a Jira ticket here:

     https://jsd.carilionclinic.org/servicedesk/customer/portal/7/create/640

k. In the **Procedure Attachment** section- Upload a picture of your bill only paper sheet with any patient identifying info blacked out or removed.

l. Click **Submit**.

What is the workflow after I click submit?

1. The requisition routes to whoever you selected in the "Procedure Verified By" section for approval.
   - This is against the Epic record to ensure accuracy.
   - If they deny the requisition because there is missing or incorrect information, you need to contact whoever you chose in the "Procedure Verified By" section via email if you have questions.
     - **Jennifer Sutphin**- jlquesenberry@carilionclinic.org
     - **Kristina Fralin**- kdfralin@carilionclinic.org
     - **Daniela Hofer-** dhofer@carilionclinic.org
     - **Jessica Martin**- jsmartin1@carilionclinic.org
     - **Terresa Odum**- tfodum@carilionclinic.org
     - **Leah Britton**- lnbritton@carilionclinic.org
   - If your requisition is denied, the workflow stops, and you will need to re-submit a new one.
2. As soon as the requisition is approved, a PO will automatically generate. The status will show as **successfully completed** when it has been approved.
3. The PO will route to a buyer for issuing.
   - This is what stops us from automatically sending your order via EDI, thus duplicating this order, so it is a necessary step.
4. In the **Purchase orders and statuses** column, your PO will become a blue hyperlink and say "issued."
5. Click on the link.
6. Your PO is visible.
7. In the top right corner, click PDF or Excel to export and download.