

Reporting: RPT – Transfer Listing

What is a Transfer?

DEFINITIONS

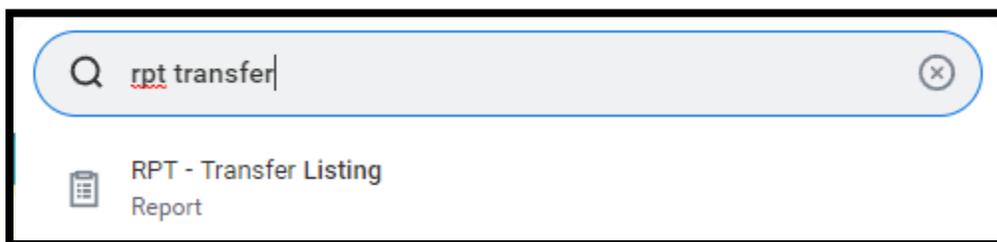
For the purposes of this report, **Transfer** means any sort of change to a worker’s job details. This includes data changes, promotions, demotions, lateral transfers, and reclassifications.

Category	Definition
Data Change	Change to miscellaneous data element(s) not related to a change in job.
Promotion	Change in job with increased qualifications / requirements and / or scope of responsibility.
Demotion	Change in job with decreased qualifications / requirements and / or scope of responsibility.
Transfer	Change in job with lateral qualifications / requirements and / or scope of responsibility.
Job Reclassification	Change in job that occurs as a result of evaluation of duties, responsibilities, qualifications and/or departmental needs; may be upward, downward or lateral.

For more information, check out our [Change Job – Process Options](#) job aid.

Running the Report

To get to this report, type **RPT – Transfer Listing** in the Workday search bar. Click on the report name.



NOTE: This report is designed for managers and will only display data for workers that roll up to the manager.

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Prompts

The screenshot shows the 'RPT - Transfer Listing' form. It includes the following fields and options:

- Event Effective Date On or After:** A date input field with a calendar icon, highlighted with callout 1.
- Event Effective Date On or Before:** A date input field with a calendar icon, highlighted with callout 1.
- Business Process Reason:** A dropdown menu with a list icon, highlighted with callout 2.
- Worker Type:** A dropdown menu with a list icon, highlighted with callout 2.
- Primary Job Changes Only:** A checkbox, highlighted with callout 3.
- Cost Center Changes Only:** A checkbox, highlighted with callout 4.
- Job Profile Changes Only:** A checkbox, highlighted with callout 5.
- Filter Name:** A text input field, highlighted with callout 6.
- Manage Filters:** A button next to the Filter Name field.
- Save:** A button below the Filter Name field.
- 0 Saved Filters:** Text indicating the number of saved filters.

1 **EFFECTIVE DATES**
You must choose a start and end date for the time period you wish to see the counts.

2 **BUSINESS PROCESS REASON**
You can narrow down your search by Change Job reason. Click the **drop down** menu, select **By Type**, then **Change Job**, and the **reasons** you wish to use.

3 **PRIMARY JOB CHANGES ONLY**
When this is checked, the report will exclude Change Jobs on additional jobs.

COST CENTER CHANGES ONLY

4 When this is checked, the report will only display Change Jobs where the cost center changed.

JOB PROFILE CHANGES ONLY

5 When this is checked, the report will only display Change Jobs where the job profile changed.

FILTERS

6 If you run this report frequently for the same population(s), you can Save your filters. To do so, enter the appropriate information in the prompts, enter a Name for your filter and click Save. When you go to run this report again, you can click the arrow next to Saved Filters to choose a filter you created previously. Filters are unique to you and are not sharable.

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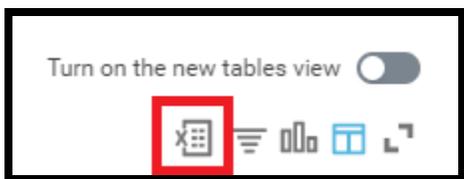
Reviewing the Data

TABLE

The information is not grouped, but rather displays all relevant data items for each transaction.

The report displays **Current** data, meaning the information prior to the effective date (in green below); as well as **Proposed** data, meaning the information on the effective date (in orange below).

Location - Current	Scheduled Hours - Current	Work Shift - Current	Job Requisition	Job Profile - Proposed	Management Level - Proposed	CF-LH-Institute Proposed
Geisinger Medical Center (GMC)	40	Days (United States of America)		J-02064 - Patient Access Representative	Individual Contributor Nonexempt Non Clinical	CC_INST_SRGSP Surgical Services
Geisinger Medical Center (GMC)	40	Days (United States of America)		J-00772 - Cook	Individual Contributor Nonexempt Non Clinical	CC_INST_HPSVC Hospitality Services
Geisinger Medical Center (GMC)	40	Evenings (United States of America)		J-02528 - Revenue Cycle Clerk	Individual Contributor Nonexempt Non Clinical	CC_INST_FIN Finance
Community Medical Center (GCMC)	40	Rotation (United States of America)		J-00051 - Administrative Assistant	Individual Contributor Nonexempt Non Clinical	CC_INST_HPSVC Hospitality Services
Geisinger Shamokin Area Community Hospital (GSACH)	40	Rotation (United States of America)		J-02064 - Patient Access Representative	Individual Contributor Nonexempt Non Clinical	CC_INST_CANCI Cancer Institute



ANALYTICS USING EXCEL

You can export the report to Excel and use Excel's Pivot Table and Pivot Chart functionality to see the data in aggregate. Click on the Excel button on the top right corner of the report to export.

Have Questions? Contact our HR Technology team at HR_Data_Request@geisinger.edu
