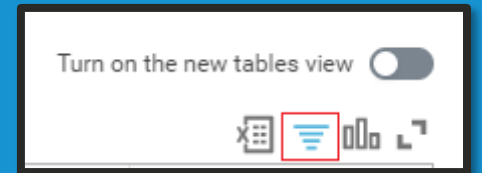


Workday Reporting: Tips and Best Practices

Geisinger

Tips and Best Practices for identifying
the right people (population) to
include in your report(s)

By Time Type



How to report on populations based on **time type** using the filter options on the top right corner of Workday reports.

Time type is an indicator of the type of hours an employee works (i.e. Full Time or Part Time)

Best Practice: Per Diem

Tips:

- Per Diem is what we previously called “Flex”
- In Workday, the Time Type displays as Part Time for this population
- Some jobs have set pay rates for per diem employees. These job profiles end with “Per Diem”.

J-02021 - Occupational Therapist Per Diem	Job Profile
J-02181 - Physical Therapist Per Diem	Job Profile
J-02188 - Physician Assistant Per Diem	Job Profile

The best way to identify this group is

Time Type: Part Time

And

Scheduled Weekly Hours: zero (0)

Filter

- × Time Type begins with Part Time
- × Scheduled Weekly Hours is empty

[Remove All](#)

[Add](#)

Add Filter

Column * Time Type ▼

Filter Condition * begins with ▼

Value * Part Time

[Filter](#) [Cancel](#)

Add Filter

Column * Scheduled Weekly Hours ▼

Filter Condition * is empty ▼

[Filter](#) [Cancel](#)

Best Practice: Part Time

Tips:

- Per policy, part timers have scheduled hours less than 35
- A worker cannot be part time in an exempt job profile. To accommodate these scenarios, be sure to use the job profiles that end in “Part Time”. These job profiles are specifically non-exempt.

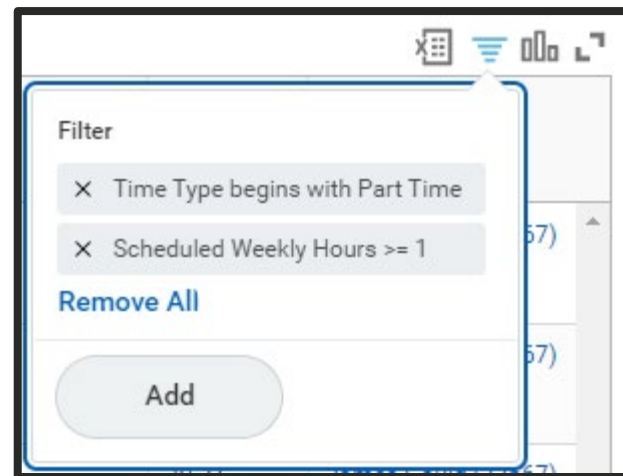
J-03313 - Physical Therapist Part Time	Job Profile
J-03314 - Physician Assistant Part Time	Job Profile

The best way to identify this group is

Time Type: Part Time

And

Scheduled Weekly Hours:
greater than zero (0)



Add Filter

Column * Time Type ▼

Filter Condition * begins with ▼

Value * Part Time

[Filter](#) [Cancel](#)

Add Filter

Column * Scheduled Weekly Hours ▼

Filter Condition * >= ▼

Value * 1

[Filter](#) [Cancel](#)

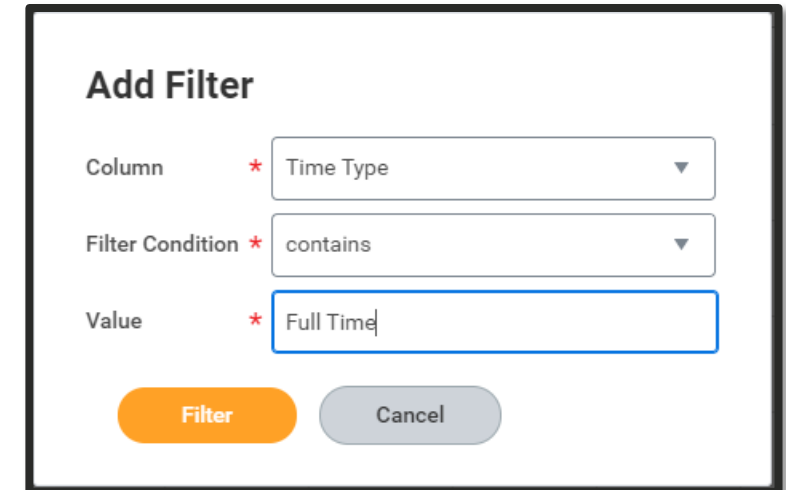
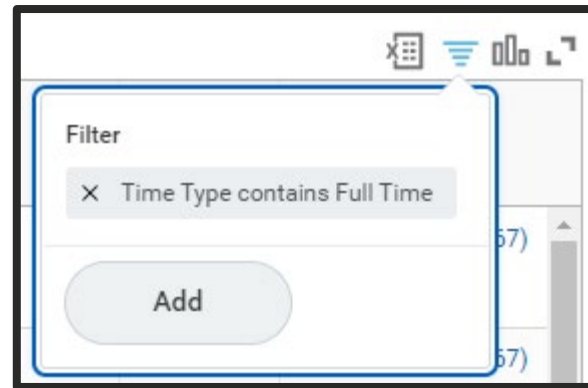
Best Practice: Full Time

Tips:

- Per policy, full timers have scheduled hours greater than or equal to 35

The best way to identify this group is

Time Type: Full Time

A screenshot of the 'Add Filter' dialog box. It has a title 'Add Filter' and three input fields. The first field is labeled 'Column' and has a dropdown menu with 'Time Type' selected. The second field is labeled 'Filter Condition' and has a dropdown menu with 'contains' selected. The third field is labeled 'Value' and has a text input field with 'Full Time' entered. Below the input fields are two buttons: 'Filter' (orange) and 'Cancel' (grey).

By Job

How to report on populations using the **job architecture** via the prompts and filters of Workday reports.

Job architecture is the term used to describe the characteristics of job profiles, such as management level, job family, and job family group.

RPT - Worker Listing

Effective as of Date

Organizations *

Include Subordinate Organizations

Job Family

Job Family Group

Location

Worker

Best Practice: Nursing

Tips:

- Inpatient nurses always have the word “Inpatient” in the job title
- Outpatient nurses will sometimes have “Clinic” in the title, other times they will not have a descriptor
- This Job Family Group includes the following Job Families:
 - Registered Nurse
 - Inpatient Registered Nurse
 - Licensed Practical Nurse
 - Nursing Administration
 - Nursing Support Services
 - ER Techs
 - NAs
 - NSAs
 - UDCs

The best way to identify this group is

- **Job Family Group: Nursing**

The screenshot displays a software interface for configuring a Job Family Group. On the left, there are three input fields: 'Job Family Group' (containing 'Nursing'), 'Location', and 'Worker'. On the right, the 'Job Family' details are shown, including the name 'Nursing' and a list of included Job Families: Inpatient Registered Nurse, Licensed Practical Nurse, Nursing Administration, Nursing Support Services, and Registered Nurse.

Job Family Group	<input type="text" value="Nursing"/>
Location	<input type="text"/>
Worker	<input type="text"/>

Job Family	
Nursing	
Job Family Group	Yes
Includes Job Families	Inpatient Registered Nurse Licensed Practical Nurse Nursing Administration Nursing Support Services Registered Nurse

Best Practice: Providers

Tips:

- This includes the following Job Families:

(Advanced Practitioners)

- Certified Nurse Midwife
- CRNA
- Nurse Practitioners
- Physician Assistants

(Physicians)

- PhD
- Physician
- Physician Hospital Based

The best way to identify this group is

- **Job Family Group: Provider**

The screenshot shows a configuration window for a 'Job Family Group'. The window title is 'Job Family Group' and it has a close button (X) and a menu icon (three dots). The window is divided into two main sections. The left section contains three input fields: 'Job Family Group' (with a dropdown menu showing 'Provider'), 'Location', and 'Worker'. The right section is titled 'Job Family' and has a 'Provider' label. Below this, there are two rows of configuration: 'Job Family Group' set to 'Yes' and 'Includes Job Families' set to a list of job families: 'Certified Nurse Midwife', 'CRNA', 'Nurse Practitioners', 'PhD', 'Physician', 'Physician Assistants', and 'Physician Hospital Based'. There is a 'Less (2)' button at the bottom of the list. The window also has a close button (X) in the top right corner.

Field	Value
Job Family Group	Provider
Location	
Worker	
Job Family	Provider
Job Family Group	Yes
Includes Job Families	Certified Nurse Midwife CRNA Nurse Practitioners PhD Physician Physician Assistants Physician Hospital Based

Best Practice: Pharmacy Technicians

Tips:

- Job Profile IDs beginning with CW or V identify Contingent Workers.
- Job Profile IDs beginning with J identify Employees.

Add Filter

Column * Job Profile ▼

Filter Condition * is ▼

Value * ☰

Filter

- <Blanks>
- J-02158 - Support Associate Pharmacy
- J-02159 - Pharmacy Technician I
- J-02161 - Pharmacy Technician II Certified
- J-02163 - Pharmacy Technician III Certified

The best way to identify this group is

- **By Job Profile:**
 - Technicians
 - J-02140 - Pharmacy Discharge Technician
 - CW-02159 - Pharmacy Technician I
 - J-02159 - Pharmacy Technician I
 - J-02160 - Pharmacy Technician I USW
 - J-02161 - Pharmacy Technician II Certified
 - J-02162 - Pharmacy Technician II USW
 - J-02163 - Pharmacy Technician III Certified
 - J-02164 - Pharmacy Technician Lead
 - J-03159 - Pharmacy Technician III USW
 - Students
 - J-02165 - Pharmacy Technician Student
 - J-02166 - Pharmacy Technician Trainee
 - CW-05038 - Student Pharmacy Technician

Best Practice: Phlebotomists

Tips:

- Job Profile IDs beginning with CW or V identify Contingent Workers.
- Job Profile IDs beginning with J identify Employees.

The best way to identify this group is

• By Job Profile:

○ Phlebotomists

- CW-02174 - Phlebotomist I
- J-01554 - Laboratory Assistant Phlebotomist USW
- J-02024 - Phlebotomy Team Lead
- J-02174 - Phlebotomist I
- J-02175 - Phlebotomist II
- J-01188 - Phlebotomist II USW
- J-02176 - Phlebotomist III
- J-02177 - Phlebotomist III USW
- J-02178 - Phlebotomist Lead USW

○ Students

- J-02179 - Phlebotomist Student School of Phlebotomy
- CW-05039 - Student Phlebotomist

Add Filter

Column * Job Profile

Filter Condition * is

Value *

Filter


- J-02024 - Phlebotomy Team Lead
- J-02174 - Phlebotomist I
- J-02175 - Phlebotomist II
- J-02176 - Phlebotomist III
- J-02211 - Preanalytical Specialist
- J-02769 - Supervisor Laboratory Medicine

Include Subordinate Organizations

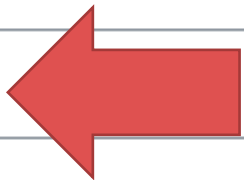
Tip: Always check the box!

- When reporting on anything within a hierarchical structure, in order to include individuals below the level you are looking at, check the box to **Include Subordinate Organizations**

RPT - Worker Listing

Effective as of Date 

Organizations *

Include Subordinate Organizations 

Job Family

Job Family Group

Location

Worker

By Financial Indicators

How to report on populations using the **financial indicators** via the prompts and filters of Workday reports.

Financial indicator is the term used to encompass Company, Cost Centers, and their related hierarchies.

The screenshot shows the configuration interface for the 'RPT - Worker Listing' report. It includes several filter fields: 'Effective as of Date' with a date picker, 'Organizations' with a dropdown menu and a red asterisk, 'Include Subordinate Organizations' with a checkbox, 'Job Family' with a dropdown menu, and 'Job Family Group' with a dropdown menu. The 'Organizations' field is highlighted with a red border.

RPT - Worker Listing	
Effective as of Date	MM/DD/YYYY
Organizations *	<input type="text"/>
Include Subordinate Organizations	<input type="checkbox"/>
Job Family	<input type="text"/>
Job Family Group	<input type="text"/>

Best Practice: Environmental Services

Tips:

- When reporting using Cost Center Hierarchy, be sure to check the box that says **Include Subordinate Organizations**
- Cost Center Hierarchies have codes that indicate the level in the hierarchy.
 - INST = Institute
 - SL = Service Line
 - DIV = Division

The best way to identify this group is

- **Cost Center Hierarchy: CC_SL_EVS Environmental Services**

RPT - Worker Listing

Effective as of Date: MM/DD/YYYY

Organizations: * Search

Include Subordinate Organizations

Job Family

Job Family Group

Location

Worker

Organizations by Type

- Company
- Company Hierarchy
- Cost Center
- Cost Center Hierarchy**
- Location Hierarchy
- Matrix
- Pay Group
- Region
- Region Hierarchy
- Supervisory

RPT - Worker Listing

Effective as of Date: MM/DD/YYYY

Organizations: * CC_SL_EVS Environmental Services

Include Subordinate Organizations

Job Family

Job Family Group

Location

Worker

Best Practice: Food Services

Tips:

- When reporting using Cost Center Hierarchy, be sure to check the box that says **Include Subordinate Organizations**
- Cost Center Hierarchies have codes that indicate the level in the hierarchy.
 - INST = Institute
 - SL = Service Line
 - DIV = Division

The best way to identify this group is

- **Cost Center Hierarchy - Service Line: CC_SL_FOODS Food Services**

RPT - Worker Listing

Effective as of Date: MM/DD/YYYY

Organizations: * Search

Include Subordinate Organizations:

Job Family: >

Job Family Group: >

Location: >

Worker: >

Organizations by Type:

- Company >
- Company Hierarchy >
- Cost Center >
- Cost Center Hierarchy >**
- Location Hierarchy >
- Matrix >
- Pay Group >
- Region >
- Region Hierarchy >
- Supervisory >

RPT - Worker Listing

Effective as of Date: MM/DD/YYYY

Organizations: * x CC_SL_FOODS Food Services

Include Subordinate Organizations:

Job Family: >

Job Family Group: >

Location: >

Worker: >

Best Practice: CCHC

Tips:

- Using Worker IDs beginning with 8000 won't produce a report that includes ALL CCHC employees. Some CCHC employees have Worker IDs that don't begin with 8000.

The best way to identify this group is

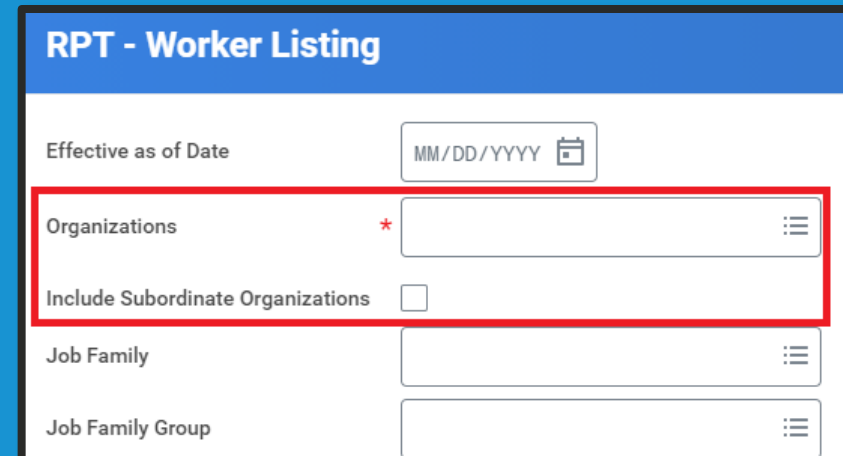
- Company:** 8000 Caring Community Health Center

The screenshot displays the 'RPT - Worker Listing' interface. On the left, there are several filter fields: 'Effective as of Date' (with a date picker), 'Organizations' (with a search icon), 'Include Subordinate Organizations', 'Job Family', 'Job Family Group', 'Location', and 'Worker'. The 'Organizations' field is expanded, showing a search bar and a list of options: 'Search for Organization', 'My Organizations', 'Organizations by Type', and 'Active Organizations by Hierarchy'. The 'Organizations by Type' option is selected, leading to a secondary menu with options: 'Company', 'Company Hierarchy', 'Cost Center', 'Cost Center Hierarchy', 'Location Hierarchy', 'Matrix', 'Pay Group', 'Region', 'Region Hierarchy', and 'Supervisory'. The 'Company' option is selected, leading to a final list of companies with checkboxes: 'Hospital', '5500 Geisinger Wyoming Valley Medical Center', '5710 Community Medical Center', '5810 Geisinger Community Health Services', '5900 Marworth', and '8000 Caring Community Health Center'. The '8000 Caring Community Health Center' option is checked.

By Physical Location Indicators

How to report on populations using **physical location indicators** via the prompts of Workday reports.

Physical location indicators include the campus, region, and county where a worker is located.



The screenshot shows the configuration interface for the 'RPT - Worker Listing' report. It features several input fields and a checkbox. The 'Organizations' field is highlighted with a red border and contains a red asterisk. The 'Effective as of Date' field is a date picker set to 'MM/DD/YYYY'. The 'Job Family' and 'Job Family Group' fields are dropdown menus. The 'Include Subordinate Organizations' checkbox is currently unchecked.

RPT - Worker Listing	
Effective as of Date	MM/DD/YYYY
Organizations *	<input type="text"/>
Include Subordinate Organizations	<input type="checkbox"/>
Job Family	<input type="text"/>
Job Family Group	<input type="text"/>

Best Practice: Geographic Region

Tips:

- When reporting using Location Hierarchy, be sure to check the box that says **Include Subordinate Organizations**
- **Geographic Regions** are groups of counties within Pennsylvania.
 - Northeastern Pennsylvania
 - North Central Pennsylvania
 - Central Pennsylvania
 - Southeastern Pennsylvania
 - South Central Pennsylvania
 - Western Pennsylvania

The best way to identify this group is

- **Location Hierarchy**

The screenshot shows the 'RPT - Worker Listing' form. The 'Organizations' field is selected, and a dropdown menu is open, listing various organizational types. 'Location Hierarchy' is highlighted in blue. Other options include Company, Company Hierarchy, Cost Center, Cost Center Hierarchy, Matrix, Pay Group, Region, Region Hierarchy, and Supervisory.

Field	Value / Selection
Effective as of Date	MM/DD/YYYY
Organizations	Location Hierarchy
Include Subordinate Organizations	<input type="checkbox"/>
Job Family	
Job Family Group	
Location	
Worker	

The screenshot shows a dialog box for selecting a geographic region. The 'Location Hierarchy' option is selected, and the 'Include Subordinate Organizations' checkbox is checked. The 'Job Family' and 'Job Family Group' fields are empty.

Field	Value / Selection
Organizations	Location Hierarchy
Include Subordinate Organizations	<input checked="" type="checkbox"/>
Job Family	
Job Family Group	

Best Practice: Campus

Tips:

- When reporting using Location Hierarchy, be sure to check the box that says **Include Subordinate Organizations**
- **Campuses** are groups of all the buildings on our hospital campuses.

The best way to identify this group is

- **Location Hierarchy**

RPT - Worker Listing

Effective as of Date: MM/DD/YYYY

Organizations * Search

Include Subordinate Organizations

Job Family

Job Family Group

Location

Worker

Organizations by Type

- Company >
- Company Hierarchy >
- Cost Center >
- Cost Center Hierarchy >
- Location Hierarchy >**
- Matrix >
- Pay Group >
- Region >
- Region Hierarchy >
- Supervisory >

Organizations * Search

Include Subordinate Organizations

Job Family

Job Family Group

Location

Worker

Location Hierarchy

- Geisinger Bloomsburg Hospital
- Geisinger Community Medical Center
- Geisinger Jersey Shore
- Geisinger Lewistown Hospital
- Geisinger Medical Center
- Geisinger Shamokin Area Community Hospital
- Geisinger South Wilkes-Barre
- Geisinger Wyoming Valley

Questions?

Contact us at

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