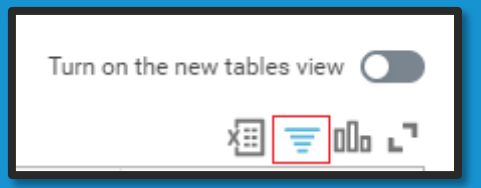
Workday Reporting: Tips and Best Practices

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

Geisinger

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

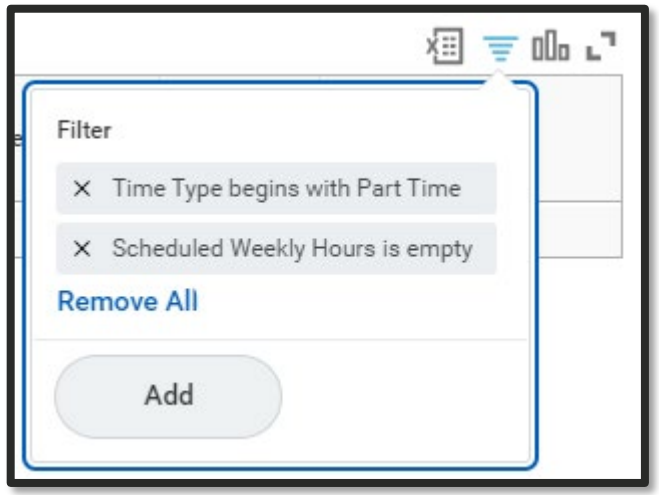
- Some jobs have set pay rates for per diem employees. These job profiles end with “Per Diem”.

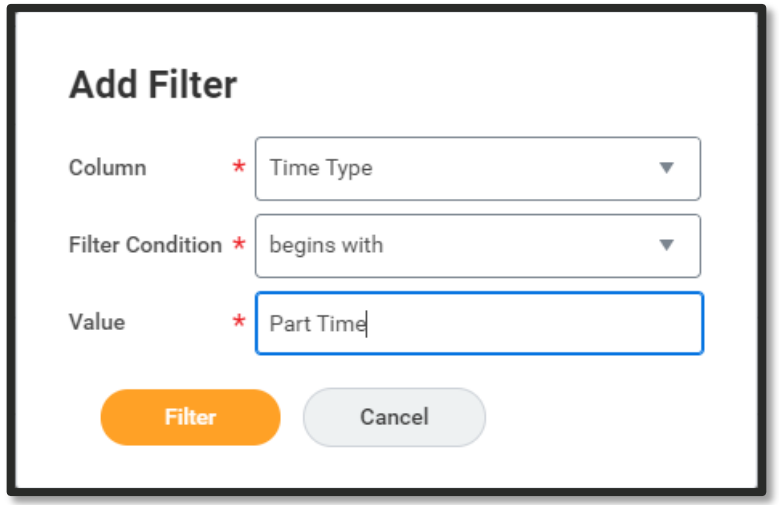
The best way to identify this group is

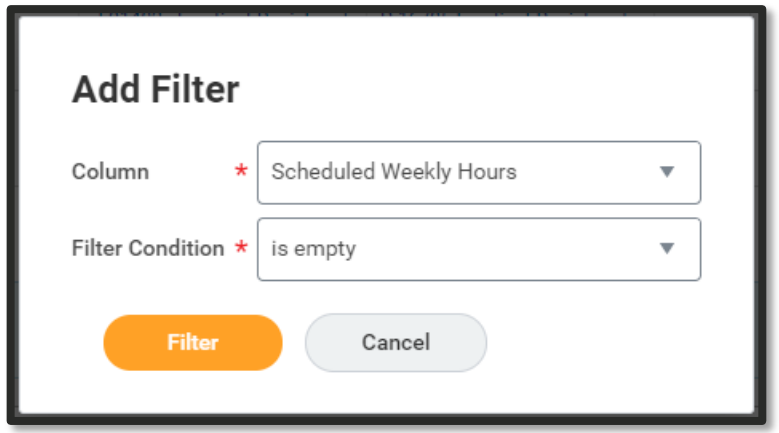
Time Type: Part Time

And

Scheduled Weekly Hours: zero (0)







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.

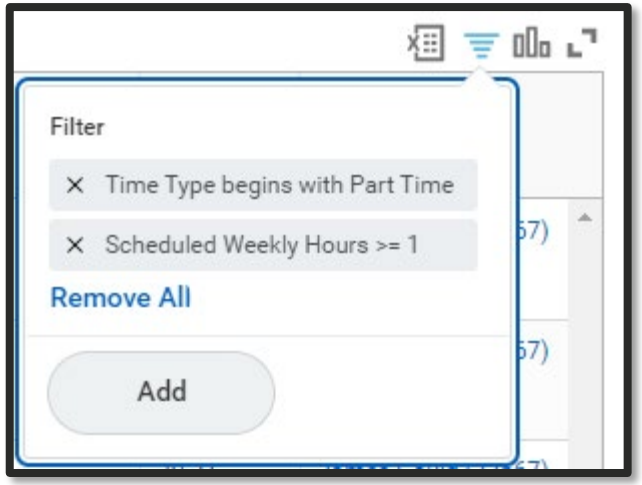
J-03313 - Physical Therapist Part Time	Job Profile
J-03314 - Physician Assistant Part Time	Job Profile

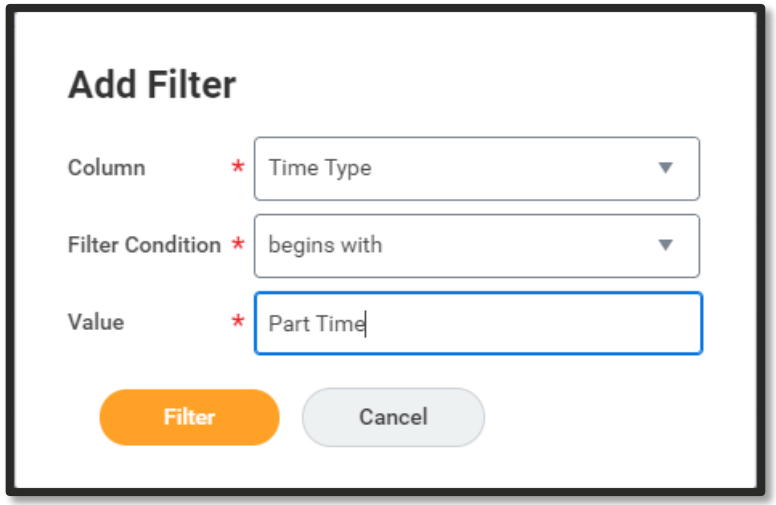
The best way to identify this group is

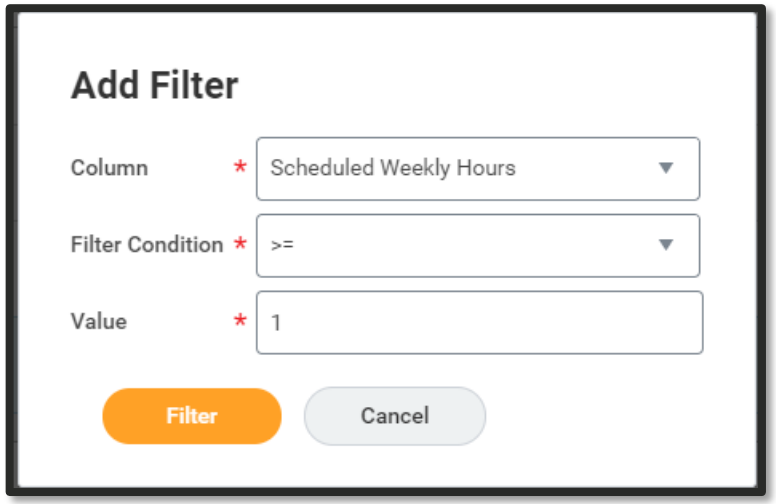
Time Type: Part Time

And

Scheduled Weekly Hours: greater than zero (0)







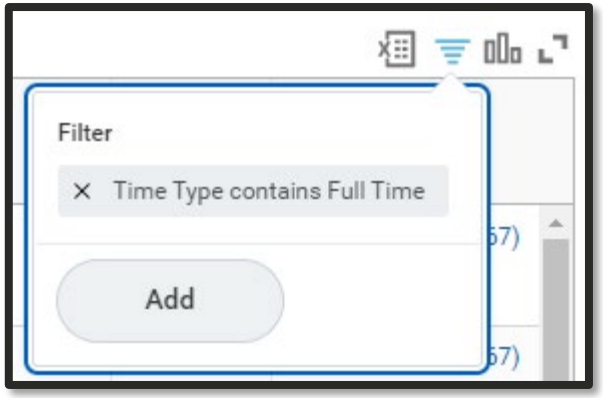
Best Practice: Full Time

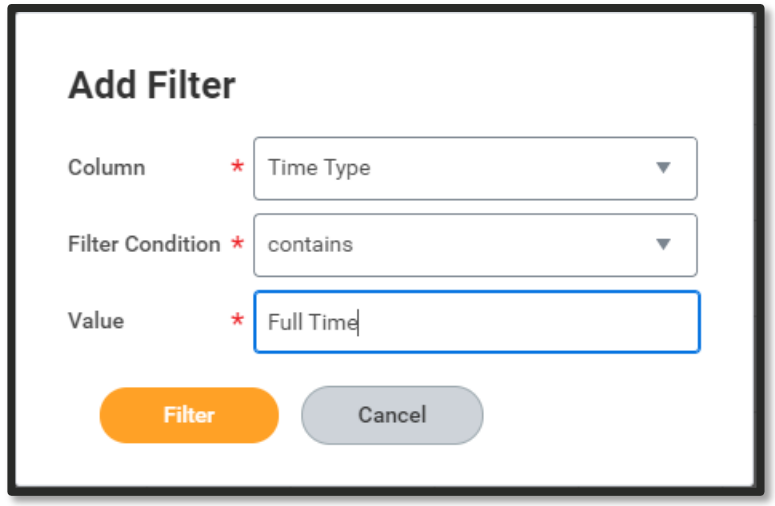
Tips:

- **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

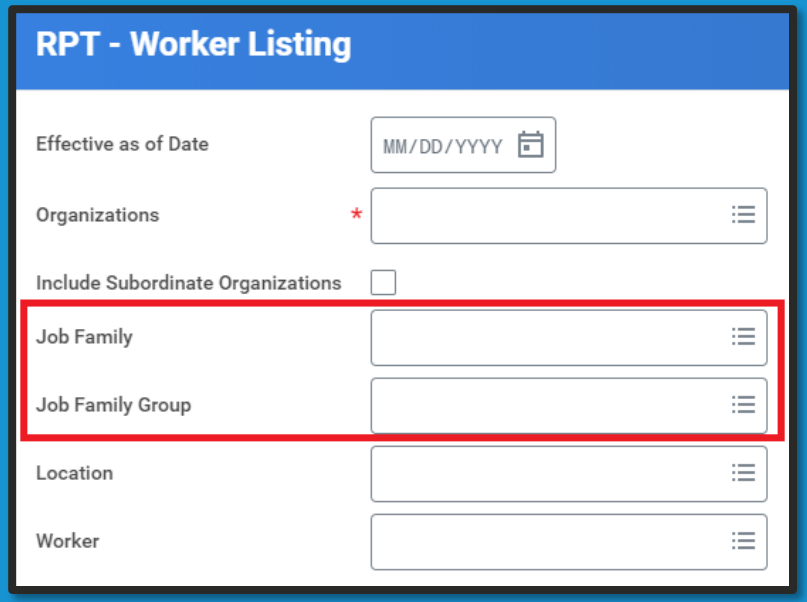




By Job

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.



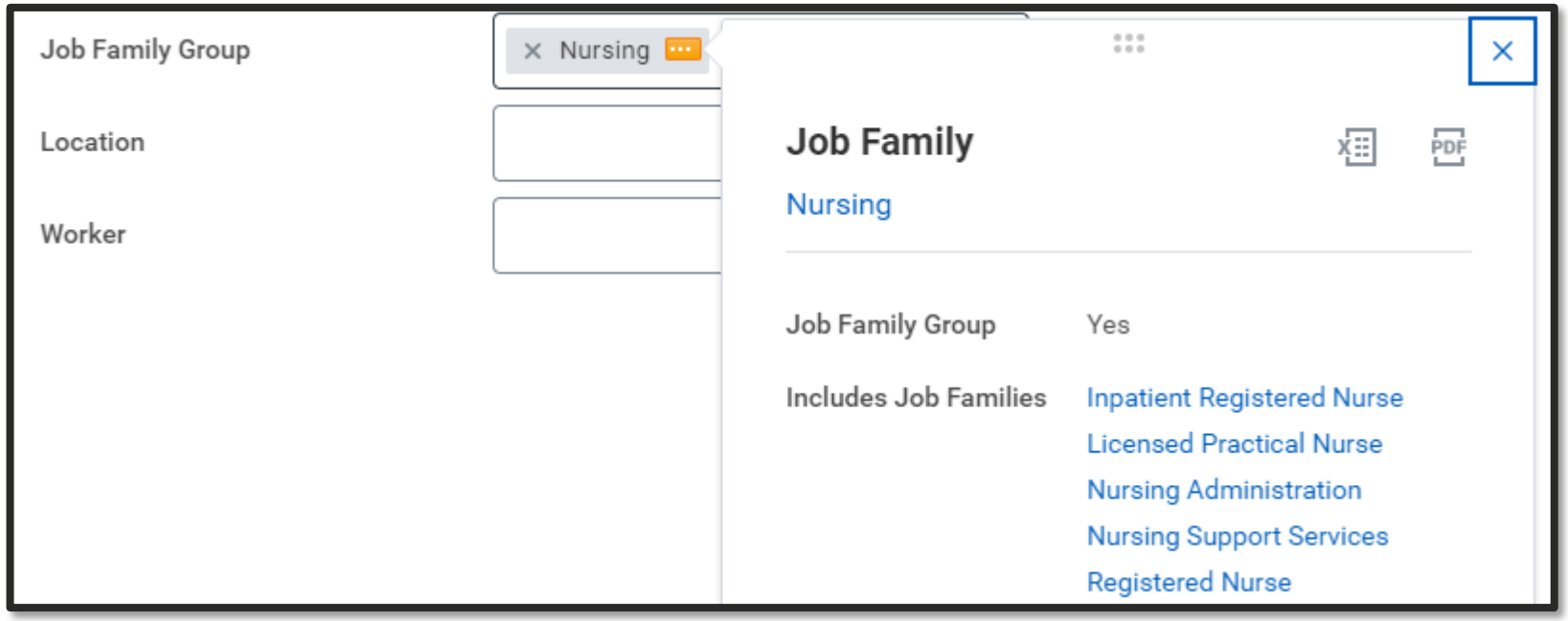
Best Practice: Nursing

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



Best Practice: Providers

Tips:

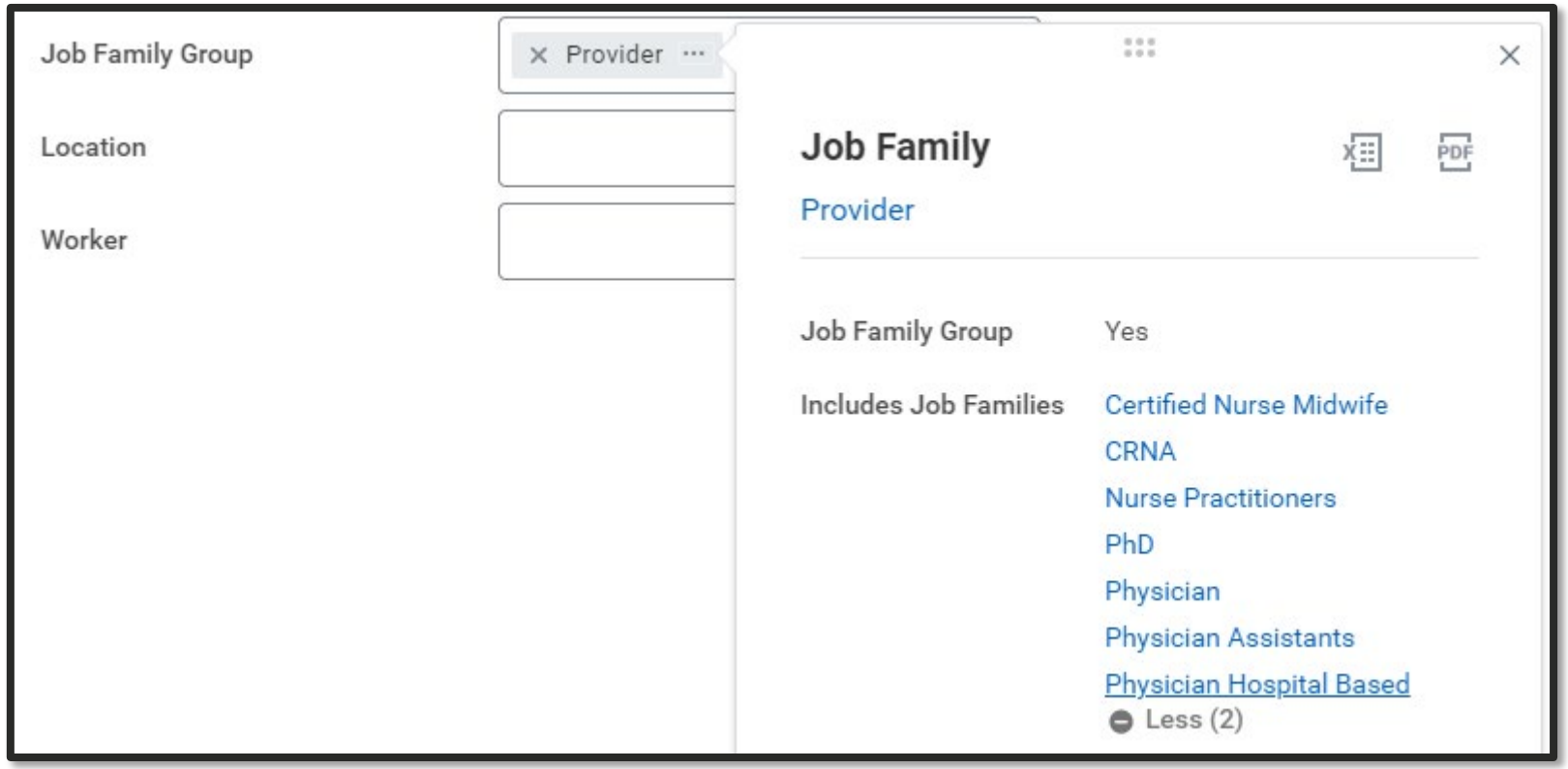
- **This includes the following Job Families:**

(Advanced Practitioners)
- Certified Nurse Midwife
- CRNA
- Nurse Practitioners
- Physician Assistants

(Physicians)
- PhD
- Physician
- Physician Hospital Based

The best way to identify this group is

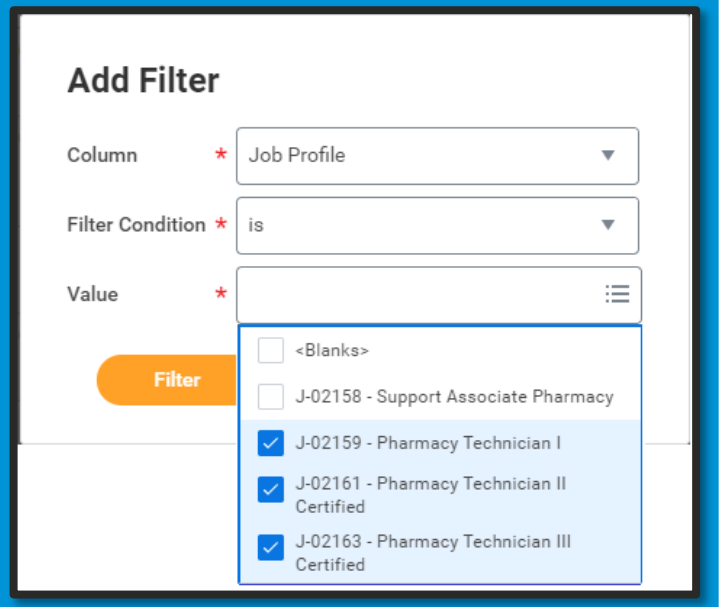
- **Job Family Group:** Provider



Best Practice: Pharmacy Technicians

Tips:

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



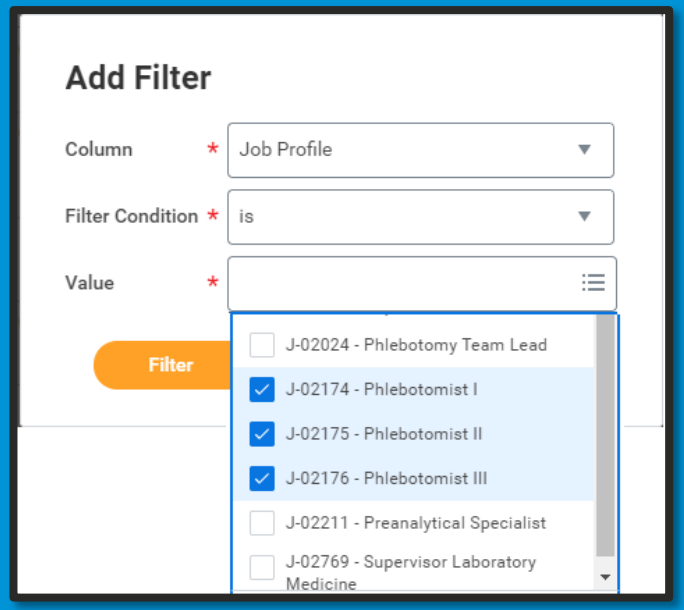
The best way to identify this group is

- **By Job Profile:**
  - 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.



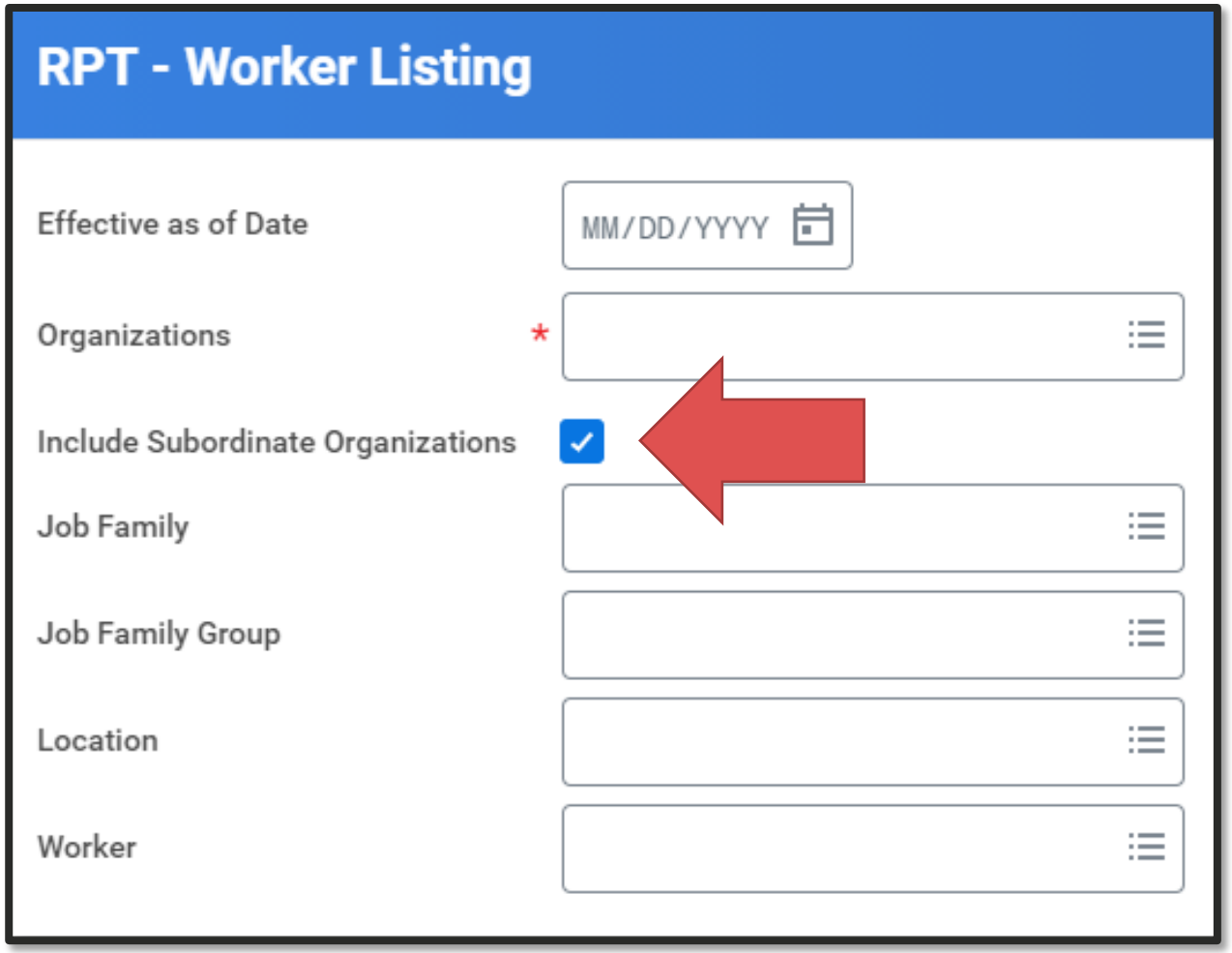
The best way to identify this group is

- **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

Include Subordinate Organizations

Tip: Always check the box!

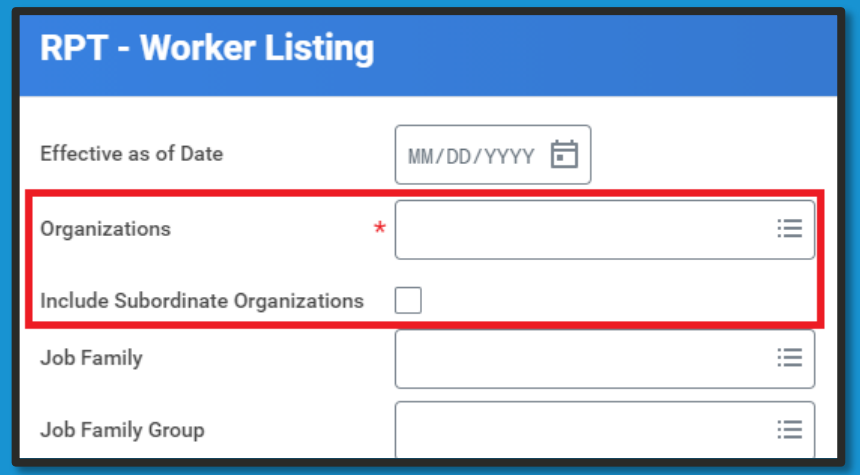
- When reporting on anything within a hierarchical structure, in order to include individuals below the level you are looking at, check the box to **Include Subordinate Organizations**



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.



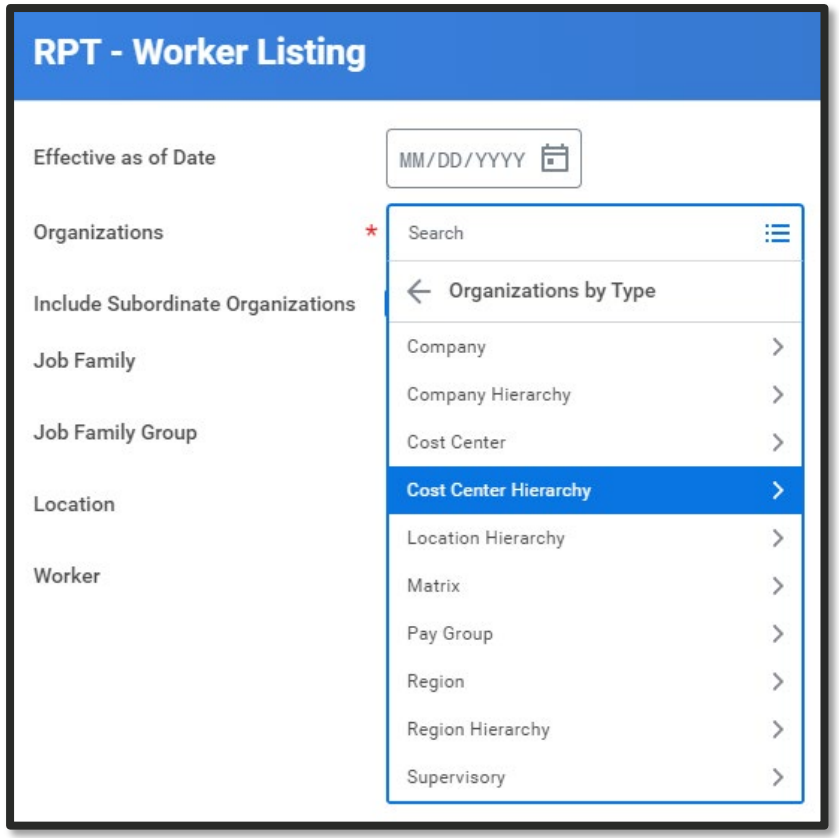
Best Practice: Environmental Services

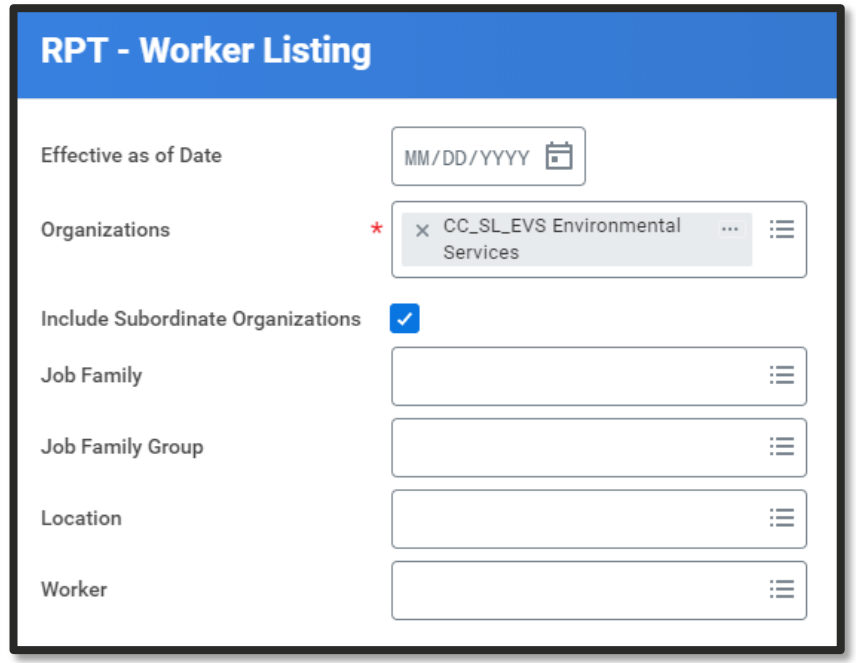
Tips:

- 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





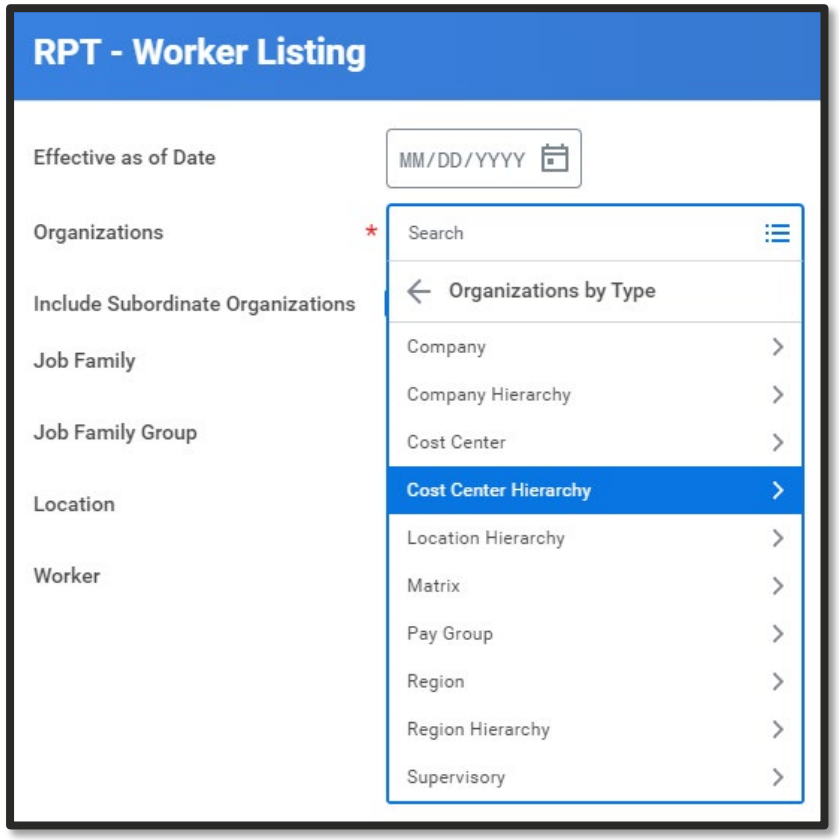
Best Practice: Food Services

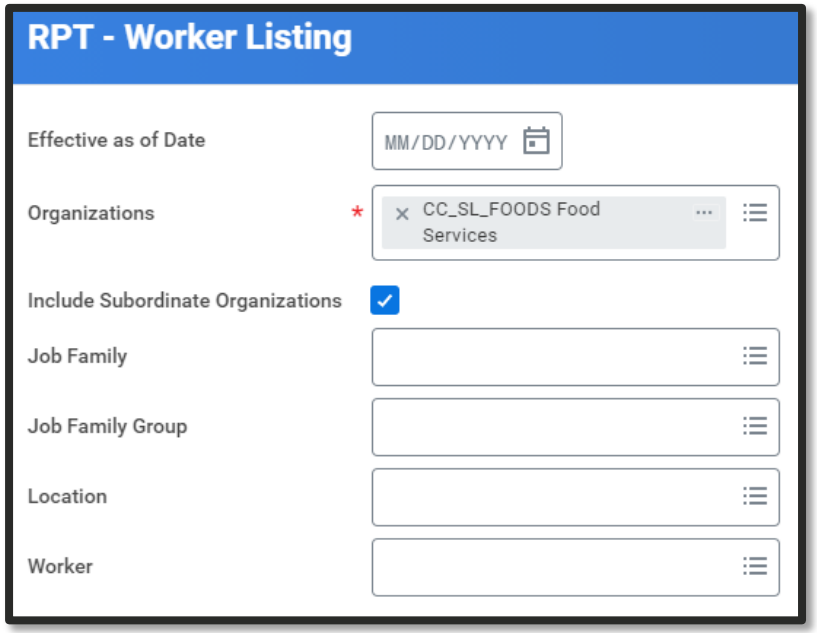
Tips:

- 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





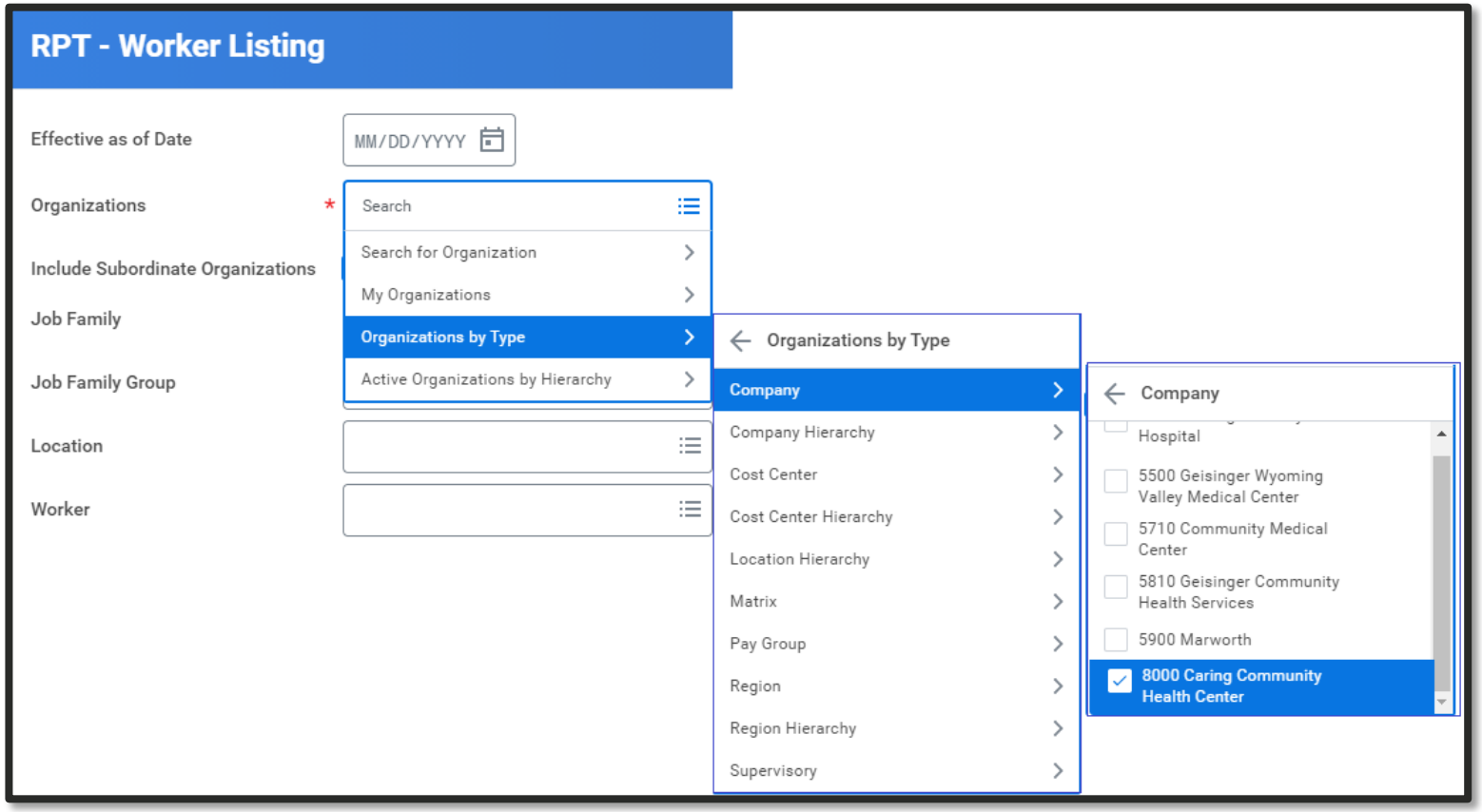
Best Practice: CCHC

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

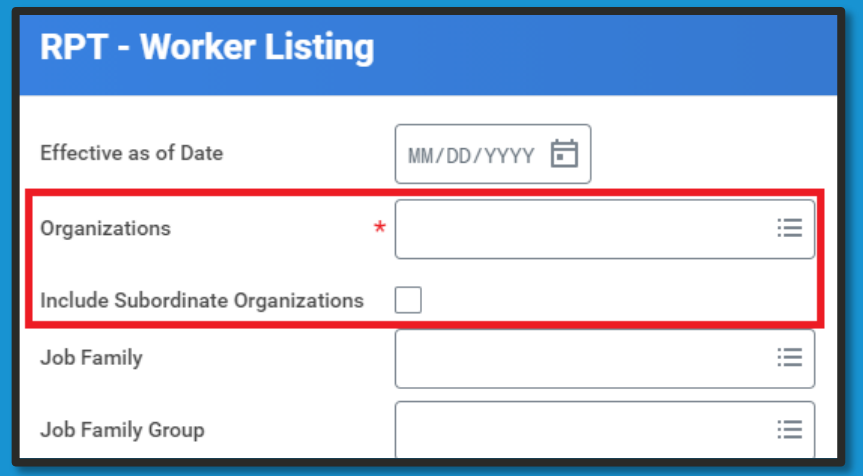
- **Company:** 8000 Caring Community Health Center



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.



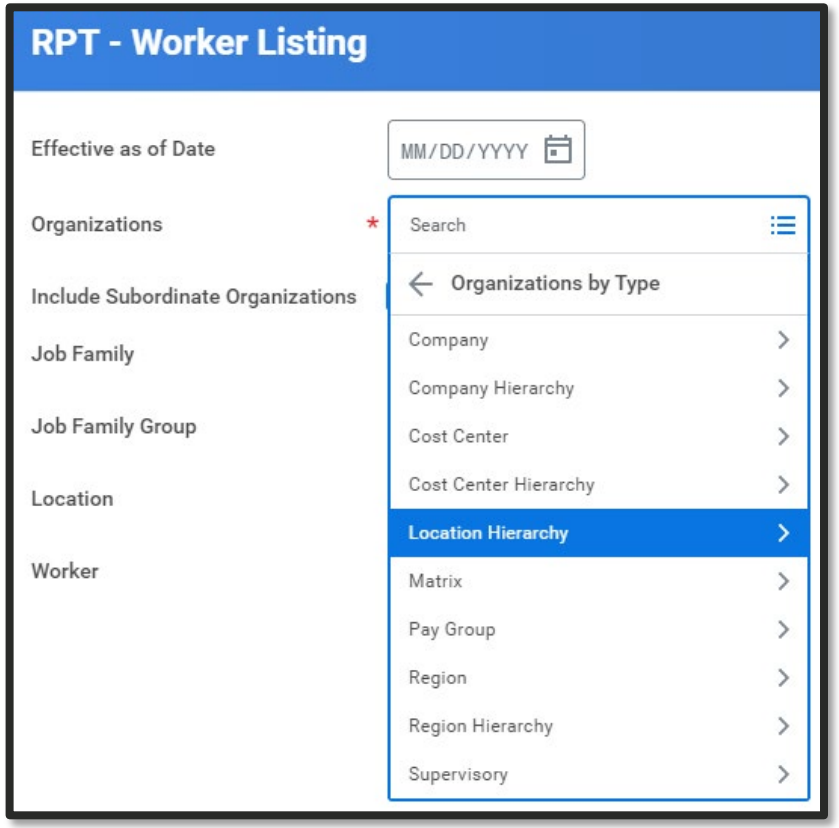
Best Practice: Geographic Region

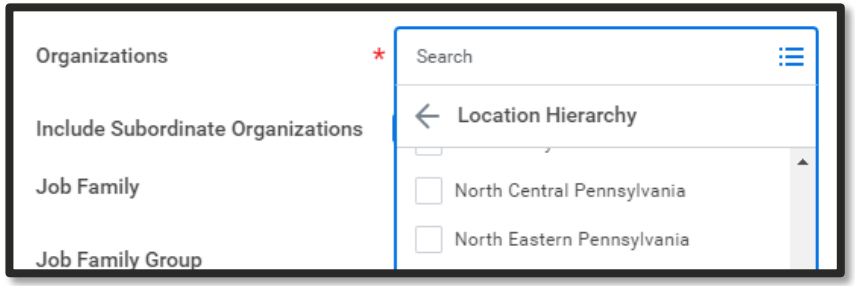
Tips:

- 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**





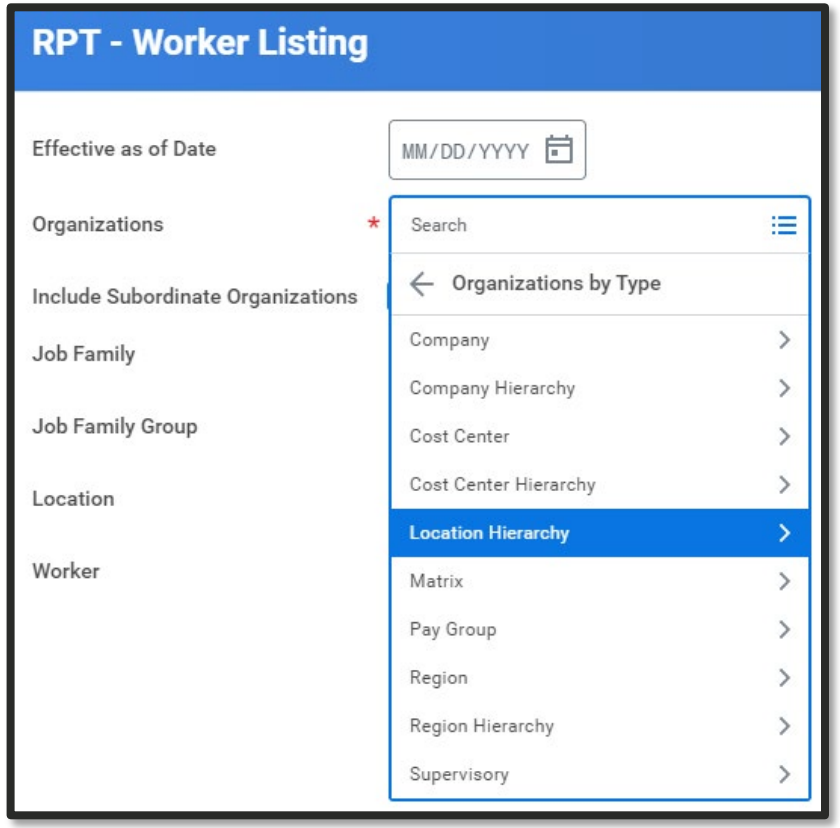
Best Practice: Campus

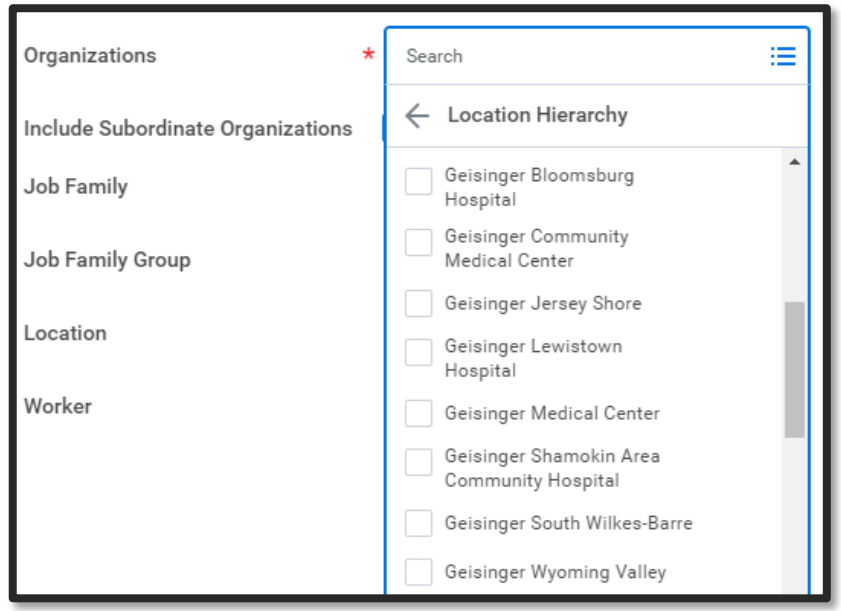
Tips:

- 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





Questions?

Contact us at HR_Data_Request@geisinger.edu

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