

Changing an Employee's Reports to Manager

Purpose

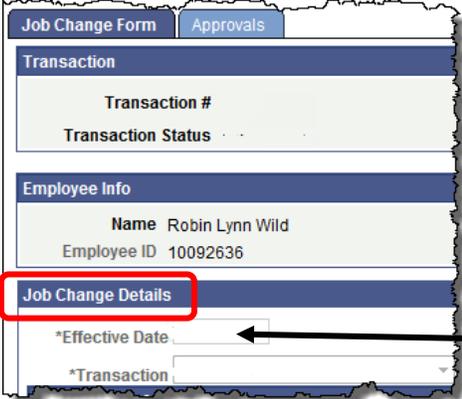
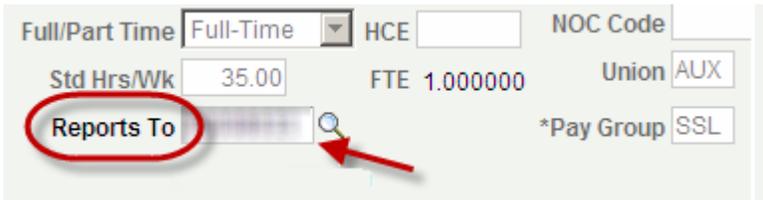
This job aid provides a detailed overview of how to change an employee's reporting manager in the HR System. This transaction allows a user to change a Position Number to whom either an employee or their position reports. All employee job records (with the exception of a scholarship job) must have an identified reporting relationship.

This information is required in order to route all transactions or requests that require the approval of an employee's Reports to Manager. This information must be kept up-to-date to ensure that requests are sent to the appropriate reporting manager and that all approvals are completed in a timely manner.

Complete the following steps:

	Step	Action
Access PeopleSoft	1.	<p>Begin, by logging into the myUofC portal:</p> <ul style="list-style-type: none"> From the mega-menu, click the My Work tab. Click the Manager self service link from the People management heading.
Navigate to the Job Change Request form	2.	<ul style="list-style-type: none"> Click the Job and Personal Information link.  Click the Job Change Requests link. 
Initiate New Transaction	3.	<ul style="list-style-type: none"> Click the Initiate New Transaction tab. 
Search for the Applicable Employee Job Record	4.	<p>Enter a valid eight digit employee ID number into the Empl ID field. (Alternatively, you can search by First and Last Name using the look up menu).</p> <ul style="list-style-type: none"> Click the Look up Empl Record (Alt + 5) button.  Select the job record you wish to view and click its link. Click the Add button.  <p>Important! Always verify you have selected the correct record before moving on to the next step.</p>

Complete the following steps:

Step	Action
<p>Enter Effective Date of Transaction</p>	<p>5.</p> <ul style="list-style-type: none"> From the Job Change Details section, enter in the Effective Date of the transaction (YYYYMMDD).  <p>Alternatively, you can click the calendar icon, and select the effective date.</p>  <p>Important! The effective date of a reporting change should always be current or future dated for the 1st or 16th of the following month to coincide with the start of a new pay period.</p>
<p>Select the Transaction Type</p>	<p>6.</p> <ul style="list-style-type: none"> Click the Transaction type drop-down list.  <ul style="list-style-type: none"> Select Reports to Update from the drop down list item.
<p>Enter new Reporting Manager's Position Number</p>	<p>7.</p> <ul style="list-style-type: none"> Under the New Job Information section of the form, enter the new position number to whom the employee reports in the Reports To field. Enter a valid position number or search for the position number by Department or Name by selecting the look-up button. 

Complete the following steps:

	Step	Action
Save Job Change	8.	<ul style="list-style-type: none"> Scroll to the bottom of the Job Change form and click the Save button.  <p>Note: You can continue to the next step or exit the Job Change form and return to complete the transaction at a later time.</p>
Validate Job Data	9.	<p>This process ensures that all job data provided is correct and that the job change will process correctly in the employee's record.</p> <ul style="list-style-type: none"> Click the Validate Job Data button.  <p>Note: If a message displays indicating the edits are Ok, move on to the next step.</p>
Begin Approvals	10.	<ul style="list-style-type: none"> Click the Begin Approvals button.  <p>Note - Once the transaction is approved by all required approvers and is processed by Human Resources, the initiator will receive an automatic email confirming that the transaction has been processed.</p> <p>Important! Once a transaction has been sent for approvals it can still be retracted, edited and resubmitted or it can be canceled.</p> <p>However, once all approvals are complete the transaction cannot be edited or canceled by the initiator.</p>
End of Procedure		

Results

Completion of this transaction results in the following:

- Changing an employee's reporting manager in the employee's Job Record