



Reporting Relationships

Reporting relationships are recorded in PAC to relate each position number to the position number for the manager to whom that position reports. These relationships drive the TLAM (Time and Absence) workflow, as well as others such as ePerformance and Concur, and maintaining them is necessary to ensure that an employee’s time and absence requests route to his/her manager.

The Manager Self Service Role is required to access and update this information for employees in your departments.

Overview

Job Descriptions and their Position Numbers are requested and modified in TalentLink. Positions include a ‘position number reports to’ field which is how the reporting relationship is set up in PAC when the position is created. Once established, changes to this structure are not required unless there is a reporting relationship change (e.g., position number changes, organizational structure changes, manager transfers, terminations, and extended leaves of absence when a proxy is not used).

Reporting relationships should be reviewed on a periodic basis to ensure that every position in your department is set up to report to the correct position number. This activity should be done even if a person is not actively occupying a position. If a new employee is occupying an existing position with an established relationship, there is no need to adjust the ‘reports to’ unless the position is reporting to a new position. Any reporting relationship changes made in PAC will be applied to the position in TalentLink the following day. For TalentLink job aids, view the [Forms & Documents section of the HR Website](#).

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View/Update Reporting Relationships

Review the department’s positions to ensure that every position is reporting to a position with an incumbent and if any changes are needed. This activity should be done periodically to manage the positions.

Step 1: Review Existing Reporting Relationships

Generate the *Active Positions and Incumbents Report* accessible through the reports section of the HR Manager Resources page on myColumbia. This report lists the active positions and the incumbents in those positions along with the manager to whom that position reports. Note any missing reporting relationships or those that require a change.

1. Navigate to my.columbia.edu
2. Select the **HR Manager** tab on top of the page.
3. Scroll down to the **Resources** section and select the **Reports** tab.

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Active Positions and Incumbents

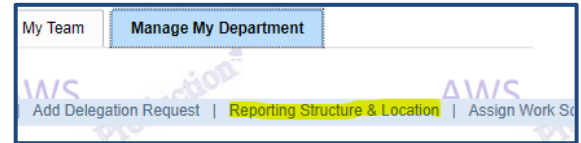
NOTE: BY ACCESSING THIS DATA YOU AGREE TO ADHERE TO UNIVERSITY POLICY ON CONFIDENTIALITY

Position Number	Position Description	Salary Admin Plan Code	Job Code	Position Department Number
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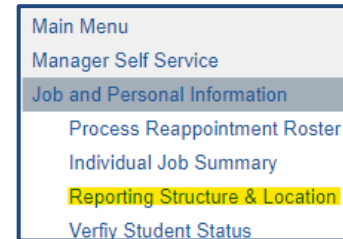
Training materials on how to generate HR Manager Reports are available on the *Forms & Documents* section of the HR Website.

Step 2: Navigate to the Reporting Structure & Location Page

Department Time Administrators (DTAs) can access this page from the TLAM WorkCenter’s **Manage My Department** tab and then the **Reporting Structure & Location** sub-tab.



MSS Users (and DTAs) – Using the PAC menu, navigate to: **Manager Self Service > Job and Personal Information > Reporting Structure & Location.**



Step 3: Locate the Employee/Position

Department Time Administrators (DTAs) can access this page from the TLAM WorkCenter’s **Manage My Department** tab and then the **Reporting Structure & Location** sub-tab.

Enter search criteria such as the Employee ID or name into a field and click **Search**. If multiple results are returned or the employee has multiple positions, select the employee and their correct position to view by clicking the link for the position you wish to view from the search results list. You will only see and be able to update data for employees whose positions are in departments to which you have access.

Reporting Structure / Location

Enter any information you have and click Search. Leave fields blank.

Find an Existing Value | Add a New Value

▼ Search Criteria

Empl ID begins with []

Empl Record = []

Alternate Employee ID begins with []

Name begins with []

Include History Correct History Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

Step 4: Enter the Effective Date for the Reporting Relationship

Effective dates **cannot** be retroactive

Position Number	20	Manager-Customer Support	
Empl ID	10		UNI
Effective Date	<input type="text" value="12/27/2023"/>		

***Note:** If the position number for the employee selected has multiple incumbents, changes made to the reporting relationship on this page will update the reporting relationship for all incumbents in this position. If the employee address is a foreign address, changes to employee office address or mailcode can only be done via Manager Self Service > Job and Personal Information > View Employee Personal Info.

Step 5: Update Reporting Relationship Details

The left side of the page is where you enter the new information. Enter the **manager's position number** in the **Reports To** field. You can also use the magnifying glass to search for the correct person/position.

The right side of the page displays the position number and position description the employee's position currently reports to. To determine who the person in that position is, refer to the *Active Positions and Incumbents Report*. Search tip! You can use the search feature on the left side to search for this position number to see the name of the occupant.

Reporting Relationship Details	
New Information	Current Information
Reports To <input type="text" value="20"/>	20
Location Code <input type="text"/>	06
Sr Director-C	Sr Director-
	Manhattanville Campus

Important! To update the reporting for a secondary administrative position for faculty, submit an incident to the HR Service Center as this needs to be assigned by the TLAM team.

Multiple Incumbents in a Position

If employees are in a multi-incumbent position, changes made on this page will update the reporting relationship for **all** incumbents in the position. If some of the employees report to different managers, they must have different position numbers. Managers cannot share a position number for the workflow to perform properly.

To change the reporting relationship for one or more employees in a multi-incumbent position, assign the employee's position you want to change to the already existing manager's position number, if applicable. If the employee will be reporting to a new position and you do not have a position number, first create the position number in TalentLink, and once created, the reporting relationships can be established.

Important! please do not reassign employees in casual positions. If you need to create new casual position numbers or reassign multi-incumbent casual positions, submit an inquiry to the HR Service Center for the TLAM team to complete.

Step 6: Save

Click **Save** on the bottom of the screen to save the changes. The changes will be visible in the report the following day.

Important! Updates can be made throughout the day but only until 5 pm. If it is after 5pm, you can make the update the next day.

Message

Current Time is 17:59:57 Changes cannot be accepted after 5 PM

OK

Optional Updates

In addition to updating the reporting relationship, an employee's work location, office, and check addresses can also be updated but are not required.

Location Code

The location code indicates the employee's work location. This is defaulted per the position number but can be changed if needed.

Employee Personal Details

In this section, on the right side of the screen, you can see the current office and check address information. Updating this section is optional and should only be completed if a change is required.

Check Sequence Code

The check address is the *delivery* location for an employee's paycheck, usually the location of the Departmental Administrator. The check sequence code indicates the employee's department and location where a paper check/check advice would be delivered. A *Check Sequence Code* is required for all employees regardless of if they receive a paper check or direct deposit. View the [Check Sequence Codes](#) job aid for a listing of codes.

If a new check address is needed, enter the *new Check Sequence Code* in the field on the left-side of the screen.

CU Office Address

The *CU Office Address* is the employee's official Columbia University work address. Enter any required updates on the left- side of the screen. **Important!** Foreign address changes can only be made via the *View Employee Personal Info* page.

Note: Only updated information will be changed. If a field is left blank, the information already in place will remain.

Reporting Relationship Details	
New Information	Current Information
Reports To <input type="text"/>	20 Human Resources
Location Code <input type="text"/>	06 Manhattanville Campus
Employee Personal Details (Optional)	
Check Sequence Code <input type="text"/>	6
CU Office Address 1 <input type="text"/>	4
CU Office Address 2 <input type="text"/>	✓
CU Office Address 3 <input type="text"/>	
City <input type="text"/>	New York
State <input type="text"/>	NY
Postal <input type="text"/>	10027