

## Maintain Reporting Relationships

Visit the HR Manager Toolkit for more information on HR related policies, processes and training.

### 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 PAC Time and Absence request workflow 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 be able 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](#).

### Table of Contents

<b>Reporting Relationships</b>	<b>1</b>
<b>Overview</b>	<b>1</b>
Multiple Incumbents in a Position	2
<b>View/Update Reporting Relationships</b>	<b>2</b>
Step 1: Review Existing Reporting Relationships	2
Step 2: Navigate to the Page	2
Step 3: Locate the Employee/Position	3
Step 4: Enter the Effective Date for the Reporting Relationship	3
Step 5: Update Reporting Relationship Details	3
Step 6: Save	3
<b>Optional Updates</b>	<b>4</b>
Location Code	4
Employee Personal Details	4
Check Sequence Code	4
CU Office Address	4

### 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 be in a multi-incumbent position.

To change the reporting relationship for one or more employees in a multi-incumbent position, a new position number needs to be created in TalentLink and once created, the reporting relationships can be established. To designate the employee(s) who occupy this new position, submit a PAF for each employee and if there are more than 10 employees, contact the HR Service Center.

### View/Update Reporting Relationships

#### Step 1: Review Existing Reporting Relationships

Before you update existing reporting structures, it is helpful to run 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.

Log in to [myColumbia](#) using your UNI and password. Click on the **HR Manager Resources** tab and then **HR Manager Reports**. Training materials on how to generate HR Manager Reports are available on the *Forms & Documents* section of the HR Website.

12/19/2017																
Active Positions and Incumbents Report																
NOTE: BY ACCESSING THIS DATA YOU AGREE TO ADHERE TO UNIVERSITY POLICY ON CONFIDENTIALITY OF SENSITIVE DATA																
Position Nbr	Position Descr	Salary Admin Plan Code	Job Code	DeptID	Department Name	Grade	Max Head Count	Head Count- if 0 then New or EMP is termed	Full/ Part	Std Hrs	Work Loc	Incumbent EmplID	Incumbent Name	Manager Position Nbr	Manager Position Descr	Mar

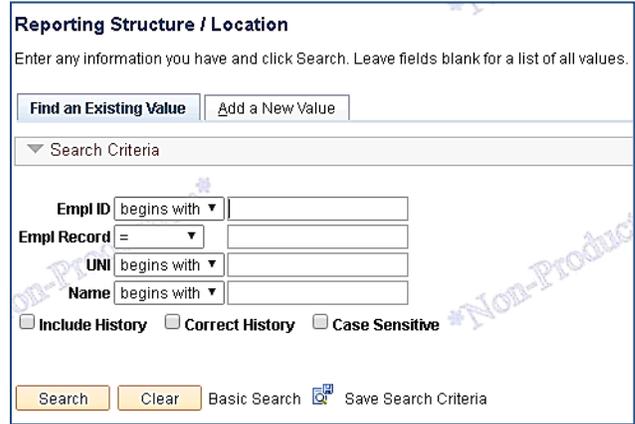
#### Step 2: Navigate to the Page

Using the PAC menu, navigate to: **Manager Self Service > Job and Personal Information > Reporting Structure & Location**. *Department Time Administrators can also access this page from the Workcenter’s “Manage My Department” tab and then the “Reporting Structure & Location” sub-tab.*



Step 3: Locate the Employee/Position

Enter search criteria such as the Employee ID, UNI 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 for a list of all values.

Find an Existing Value    Add a New Value

▼ Search Criteria

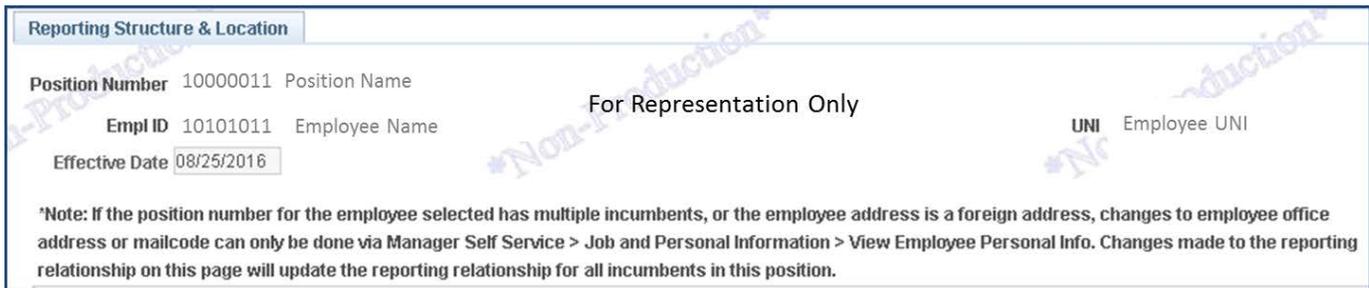
Empl ID begins with [ ]  
Empl Record = [ ]  
UNI begins with [ ]  
Name begins with [ ]

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.



**Reporting Structure & Location**

Position Number 10000011    Position Name [ ]  
Empl ID 10101011    Employee Name [ ]    **For Representation Only**    UNI Employee UNI [ ]  
Effective Date 08/25/2016

\*Note: If the position number for the employee selected has multiple incumbents, or 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. Changes made to the reporting relationship on this page will update the reporting relationship for all incumbents in this position.

Step 5: Update Reporting Relationship Details

Enter the manager's position number in the "reports to" field on the left-hand side of the screen. You can also click the magnifying glass to search for the correct person. The right side of the screen displays the 'position number' and position description the employee's position currently reports to. To determine who the person in that position is, refer back to the *Active Positions and Incumbents Report*.



**Reporting Relationship Details**

New Information		Current Information	
Reports To	20008967 <input type="text"/> <input type="button" value="Q"/> Executive Director, Manager Name	20000306	Associate Dean
Location Code	<input type="text"/> <input type="button" value="Q"/>	01	Morningside

Step 6: Save

Click Save on the bottom of the screen to save the changes. Updates can be made until 5 pm.



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 if they receive a paper check or direct deposit. A job aid listing Check Sequence Codes can be found on *Forms and Documents* on the HR Website.

If a new check address is needed for the employee, enter the new ‘Check Sequence Code’ in the field on the left-hand 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-hand side of the screen. **Important!** Foreign address changes can only be done via the *View Employee Personal Info* page.

**Note:** Only updated information will be changed in PAC. If a line is left blank, the information that was already in place will remain.

Reporting Relationship Details	
<input type="button" value="New Information"/>	<input type="button" value="Current Information"/>
Reports To <input type="text" value="20008967"/> <input type="button" value="Q"/> Executive Director, Manager Name	20000306 Associate Dean
Location Code <input type="text"/> <input type="button" value="Q"/>	01 Morningside
Employee Personal Details (Optional)	
Check Sequence Code <input type="text"/> <input type="button" value="Q"/>	14001-Columbia Business School c/o Human Resou
CU Office Address 1 <input type="text"/>	2880 Broadway, 4th Floor
CU Office Address 2 <input type="text"/>	Armstrong Hall
CU Office Address 3 <input type="text"/>	5927
City <input type="text"/> State <input type="text"/>	New York NY
Postal <input type="text"/>	10027
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Notify"/>	