1. Summary

***Use the ‘Reports To’ Maintenance page only when you are certain that reporting relationships are changing and final decisions have been made***

The ‘Reports To’ Maintenance page will be used by specific decentralized and centralized individuals for maintaining and monitoring the ‘Reports To’ field in both Position Data and Job Data. The ‘Reports To’ Insight reports will be used by these individuals for maintaining and monitoring the ‘Reports To’ field in both Position Data and Job Data. It is the responsibility of the ‘Reports To’ Maintainer to maintain ‘Reports To’ information in a timely, accurate manner.

2. How PeopleSoft Works

PeopleSoft maintains reporting relationships based on position. One CMS Position # reports to another CMS Position #. In the example below, Employee A in CMS Position # 00001234 reports to a supervisor who is in CMS Position # 00005543. When the supervisor leaves, if a new supervisor fills the vacated CMS Position #, no reporting relationship update is needed. If the new supervisor has a different CMS Position # than the current supervisor, then Reports To maintenance needs to occur.
3. Viewing Existing Reporting Relationship

Navigation:

Chico Human Resources > Reports-To Maintenance – Dept

Reporting relationships for employees can be viewed in the Reports To Maintenance page in PeopleSoft.

Note: Before making updates to the Maintenance Page, locate the Effective Date of the change based on a Staff Action Form, Faculty Contract, Reorganization, etc., and the Position Number of the person that the employee Reports To (the person who currently signs/approves that employee’s absence report or timesheet).

Note: The Effective Date defaults to a blank field and a date must be entered that reflects when the Reports To person actually changed. The Effective date cannot be older than the employee’s hire date. The Effective Date can also be the beginning of the current pay period. You will not be able to change the date if it is more than 30 days in the past or more than 30 days in the future. Do not update with incorrect information. If the Effective Date is more than 30 days from the current date, contact HR Information Systems at x4947 or hrsecurity@csuchico.edu to make the change for you.

The page is organized by CMS Position # with information about the position in the left column. Underneath the position information is a listing of incumbents currently hired into the position. In the center column is Reports To position information including the incumbent currently hired into the Reports To CMS Position #. The right column is used to make a change that will update to a new Reports To position number.

CMS Position #s can be viewed one at a time or all can be viewed. Note that the Find link can also be used to assist in locating information on the page.
4. Updating Reporting Relationships

Updates to employee reporting relationships occur on the Employee Reports To Maintenance page in PeopleSoft. The right column on the page allows for the selection of a new reporting relationship.

Updating the data on the Maintenance Page:

1. Review and update the ‘Reports To’ Position Number and the ‘Effective Date’. The date will default to a blank field and a date must be entered as appropriate. If a date is not entered, the update will not be processed.
2. ‘Reports To’ position number should be kept current and reflect the correct direct reporting relationship for each person in your respective area(s). To update the data enter or copy/paste the Position numbers OR use the Look up on the ‘Reports To’ Position Number. The ‘Reports To’ person’s name and working title will appear next to the Position Number.
3. You can view all Position Numbers in a Dept ID by clicking the ‘View All’ link at the top of the page.

Note: Look ups can be done by Position Number, Last Name, Department (Dept ID) or Position Description

The changes remain visible on the Reports To Maintenance Page and can be changed until they are processed.

5. ‘Reports To’ Insight Reports

The reports below will be used by specific decentralized and centralized individuals for maintaining and monitoring the ‘Reports To’ field in both Position Data and Job Data. These reports are in Insight. You can get to them by navigating to the Human Resources folder > Department Reports > Reports-To Maintainers.

Centralized Reports: These are reports that will be run by those in HR that have all department access. Decentralized Reports (Department security): These are reports that will be run by those with departmental security access to help them get listings of their appropriate employees and identify issues with ‘Reports To’ data in their areas.

1. ‘Reports To’ Blank or Vacant – This report will be used to identify staff and faculty employees that have blank ‘Reports To’ values. Will be able to catch timing issues and remind people to maintain this data.
2. ‘Reports To’ Changes – This report will be used to allow users to get a view of all changes that were made to employees’ ‘Reports To’ in their specific area. This report should pull the Operator ID from POS/REP row of data inserted onto Job Data. Will list what was changed including original ‘Reports To,’ and what it was changed to, by whom, and when.
3. ‘Reports To’ Inappropriate – This report will be used centrally and by maintainers to identify individuals that should not be direct reports based on their job classifications (e.g. Student Employees).
4. ‘Reports To’ Listing – This report will be used to allow users to get a view of all employees and their direct ‘Reports To’.
5. ‘Reports To’ Out of Synch (centralized only) – This report will be used to identify possible issues with the process. To identify Position and Job Data that has ‘Reports To’ values that do not match.
6. Get Help – Error Resolution

If problems are encountered or mistakes are made or if you have any questions, contact HR Information Systems (hrsecurity@csuchico.edu) to get help and to get the data corrected. Do not try to make corrections by adding additional dates.