

Maintain Reporting Relationships

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.

Whenever a new position is requested, be sure to include the 'reports to position number' on the *Position Management Request Form* and the relationship will be 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.

Updates to reporting relationships are made directly in PAC on the *Reporting Structure & Location* page.

Multiple Incumbents in a Position

When multiple employees or multiple managers occupy the same position and a reporting relationship change is needed for a portion of the employees or to select one of the managers, submit an incident to the HRPC to update.

Review Reporting Relationships

MSS roles only can access and update this page.

Before you update existing reporting structures, it is helpful to run the *Active Positions and Incumbents Report* from the HR Data Store 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.

Training materials on how to generate HR Manager Reports are available in the *Course Catalog* on the HR Website.

Important! Only Manager Self-Service users can update this page for employees in their departments.

View/Update Reporting Relationships

The PAC menu navigation for this page and where MSS users who do not hold the DTA access the page is: **Manager Self Service > Job and Personal Information > Reporting Structure & Location.**

MSS users who are also DTAs. Log in to the WorkCenter

1. Open your browser and navigate to my.columbia.edu
2. Click "Log In Now"
3. Enter your UNI and Password
4. Click "Login". You are on the Faculty and Staff page
5. Click the "Time and Absence WorkCenter" link in the *PAC Time and Absence* section

When you arrive on the WorkCenter, you will first land on the *Monthly Absence Calendar* page. From here, click the "Manage My Department" tab and then the "Reporting Structure & Location" sub-tab.

Locate the employee/position

1. Enter **search criteria** such as the Employee ID, UNI or name into a field and click 'search'. You will only see and be able to update data for employees whose positions are in departments to which you have access
2. The employee's information appears on the page. 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
3. Enter the **Effective Date** for the Reporting Relationship. Effective dates cannot be retroactive.

Reporting Structure & Location	
Position Number	10000011
Position Name	
Emp ID	10101011
Employee Name	
Effective Date	08/25/2016
For Representation Only	
UNI	Employee UNI

*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.

Maintain Reporting Relationships

Review/Update Reporting Relationship Details

Reports To:

In this section, on the right side of the screen, you can see 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*.

- To update the 'Reports To' for the employee's position, **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
- Click "**Save**" on the bottom of the screen to save the changes

Important! If a position number for the employee has multiple incumbents, changes made on this page will update the reporting relationship for *all* incumbents in the position. To change the reporting relationship for one or more employees in a multi-incumbent position, a new position number needs to be created and the new reporting relationship established.

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 listing of Check Sequence Codes can be found in a job aid in the *Course Catalog* 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.

Message

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

OK

Note: Updates can be entered daily until 5pm.

Reporting Relationship Details	
New Information	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"/>	01 Morningside
Employee Personal Details (Optional)	
Check Sequence Code: <input type="text"/>	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"/>	New York
State: <input type="text"/>	NY
Postal: <input type="text"/>	10027
Save Return to Search Previous in List Next in List Notify	