How to Maintain Reports To Information

This Job Aid illustrates how to maintain Reports To Information in PeopleSoft HCM. A manager or supervisor for each department is responsible for maintaining the Reports To position number for each position in the department. This means identifying the position number of the manager or supervisor who approves each employee's time (for example, their absence requests) in the department.

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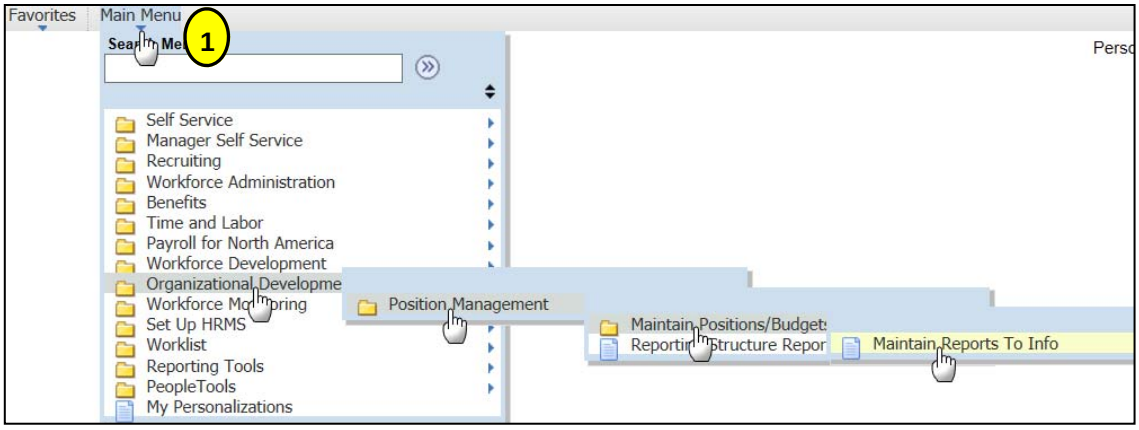
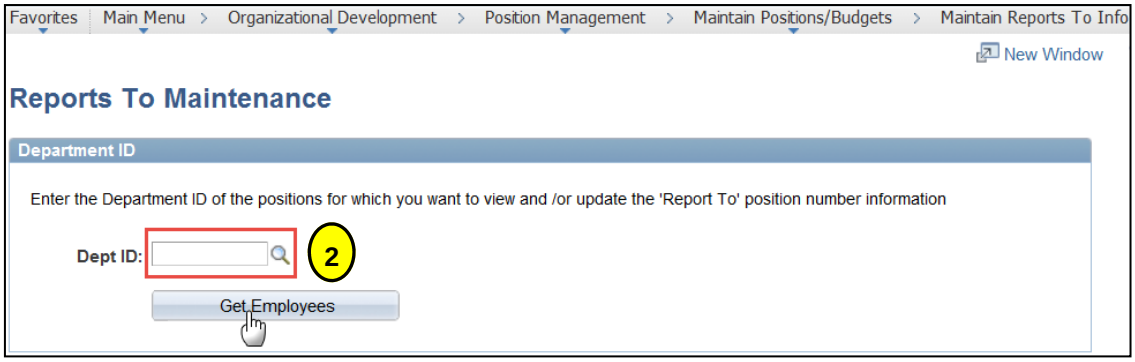
1. You have signed in to PeopleSoft HCM. Begin from the **Main Menu** (Homepage). Navigate to the **Maintain Reports To Info** page within the **Organizational Development** area.

   Click **Main Menu** > **Organizational Development** > **Position Management** > **Maintain Positions/ Budgets > Maintain Reports To Info**



2. Enter the **Department ID** for which you want to maintain the **Reports To** information. Click **Get Employees**.



NOTE: Department 5998 cannot be entered. Only managers and supervisors have access to this page.

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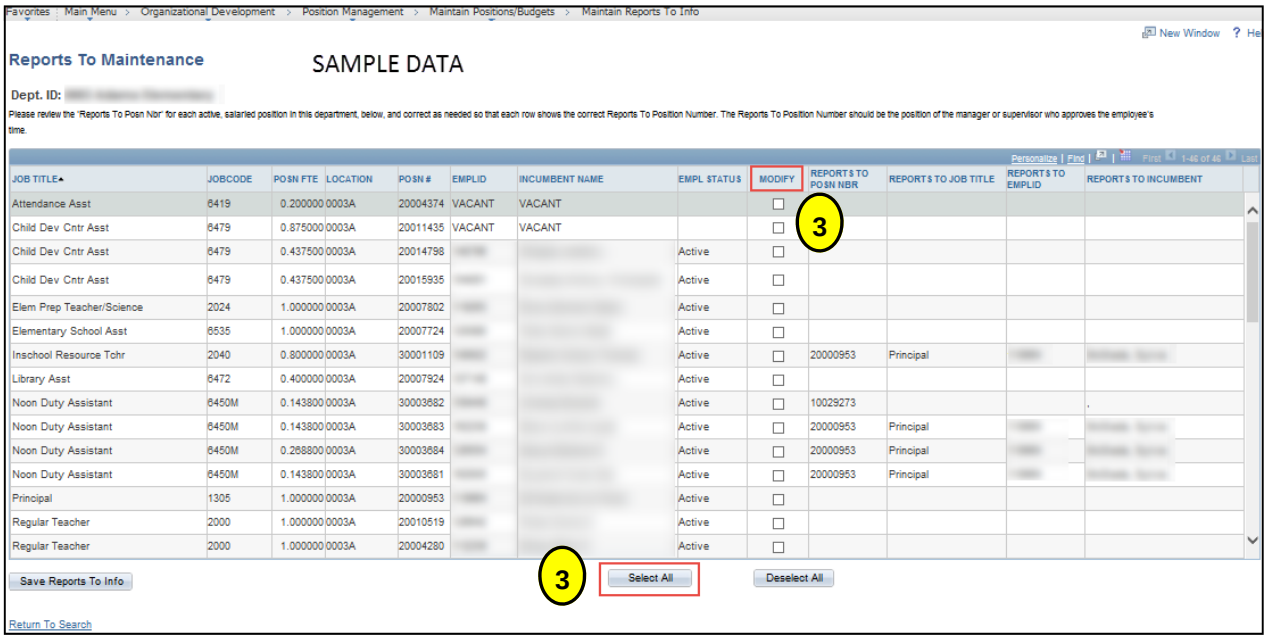
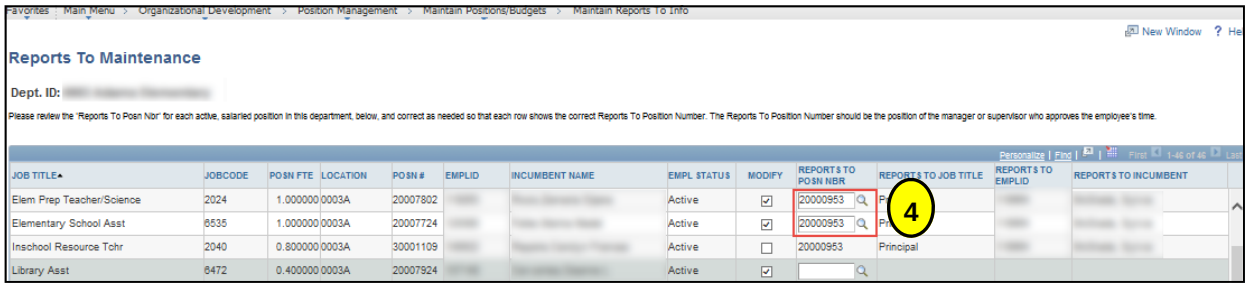
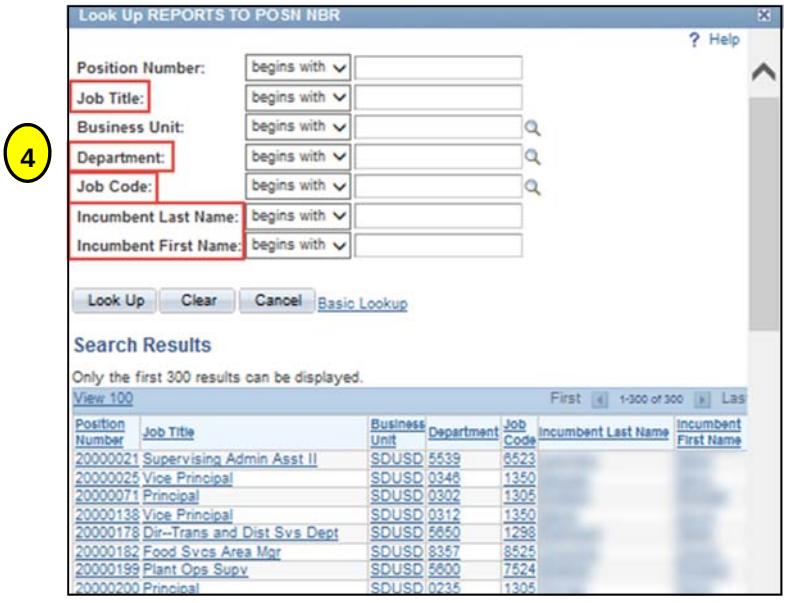
3. Click the modify checkbox for each row on which you want to enter or update the **Reports To Position Number**. Or, click the **Select All** button at the bottom of the page to select all rows. The **Reports To Position Number** field becomes editable for all of the selected rows. Scroll down to see all positions in the department.



4. Enter the **Reports To Position Number** for each row you selected.



Or click the lookup (magnifying glass icon) to search for the position number by job title, department, job code, or incumbent name. Only manager and supervision positions are shown.



NOTE: Repeat **step 4** above until all **Reports To Position Numbers** have been completed and verified as accurate.

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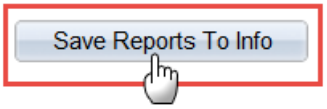
5. Click **Save Reports To Info** 

button at the bottom left of the screen.

NOTE: If a **Reports To Position Number** is inactive or is not a manager or supervisor position, an error message (see below) will appear and the invalid position number will be highlighted in red. Click the **OK** button and enter or select a valid position number from the lookup.

6. To enter **Reports To Information** for another department, click the **Return To Search** link at the bottom left of the screen.

Resume from **step 2** in this job aid for the new department.

NOTE: Please return to the **Maintain Reports To Info** page to update **Reports To Information** whenever there is a reporting structure change in your department or when new positions are added.

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