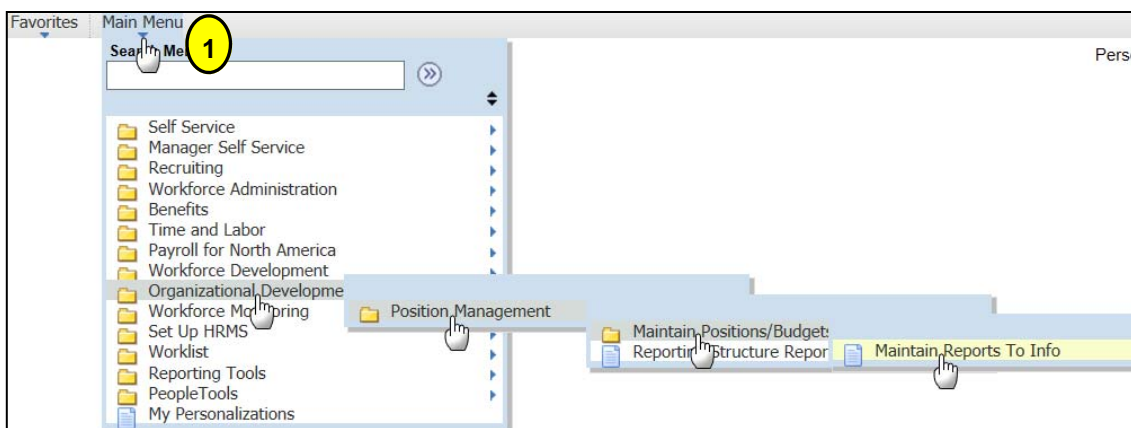


# How to Maintain Reports To Information

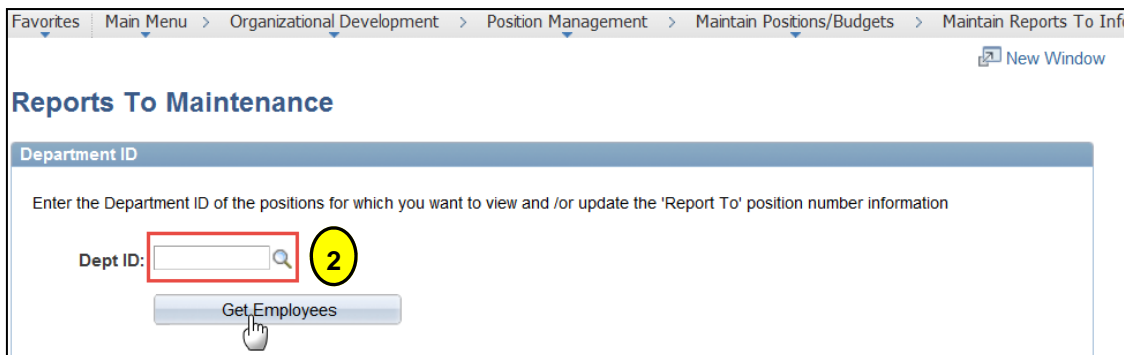
This Job Aid illustrates how to maintain Reports To Information in PeopleSoft HCM. A manager or supervisor for each department is responsible for maintaining the Reports To position number for each position in the department. This means identifying the position number of the manager or supervisor who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

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.

# How to Maintain Reports To Information

- 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.

Reports To Maintenance      SAMPLE DATA

Dept. ID: [redacted]

Please review the 'Reports To Posn Nbr' for each active, salaried position in this department, below, and correct as needed so that each row shows the correct Reports To Position Number. The Reports To Position Number should be the position of the manager or supervisor who approves the employee's time.

JOB TITLE*	JOB CODE	POSN FTE	LOCATION	POSN #	EMPLID	INCUMBENT NAME	EMPL STATUS	MODIFY	REPORTS TO POSN NBR	REPORTS TO JOB TITLE	REPORTS TO EMPID	REPORTS TO INCUMBENT
Attendance Asst	6419	0.200000	0003A	20004374	VACANT	VACANT	VACANT	<input type="checkbox"/>				
Child Dev Cntr Asst	6479	0.875000	0003A	20011435	VACANT	VACANT	VACANT	<input type="checkbox"/>				
Child Dev Cntr Asst	6479	0.437500	0003A	20014788			Active	<input type="checkbox"/>				
Child Dev Cntr Asst	6479	0.437500	0003A	20015935			Active	<input type="checkbox"/>				
Elem Prep Teacher/Science	2024	1.000000	0003A	20007802			Active	<input type="checkbox"/>				
Elementary School Asst	6535	1.000000	0003A	20007724			Active	<input type="checkbox"/>				
Inschool Resource Tchr	2040	0.800000	0003A	30001109			Active	<input type="checkbox"/>	20000953	Principal		
Library Asst	6472	0.400000	0003A	20007924			Active	<input type="checkbox"/>				
Noon Duty Assistant	6450M	0.143800	0003A	30003682			Active	<input type="checkbox"/>	10029273			
Noon Duty Assistant	6450M	0.143800	0003A	30003683			Active	<input type="checkbox"/>	20000953	Principal		
Noon Duty Assistant	6450M	0.268800	0003A	30003684			Active	<input type="checkbox"/>	20000953	Principal		
Noon Duty Assistant	6450M	0.143800	0003A	30003681			Active	<input type="checkbox"/>	20000953	Principal		
Principal	1305	1.000000	0003A	20000953			Active	<input type="checkbox"/>				
Regular Teacher	2000	1.000000	0003A	20010519			Active	<input type="checkbox"/>				
Regular Teacher	2000	1.000000	0003A	20004280			Active	<input type="checkbox"/>				

Save Reports To Info      **3**      Select All      Deselect All

Return To Search

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

Reports To Maintenance

Dept. ID: [redacted]

Please review the 'Reports To Posn Nbr' for each active, salaried position in this department, below, and correct as needed so that each row shows the correct Reports To Position Number. The Reports To Position Number should be the position of the manager or supervisor who approves the employee's time.

JOB TITLE*	JOB CODE	POSN FTE	LOCATION	POSN #	EMPLID	INCUMBENT NAME	EMPL STATUS	MODIFY	REPORTS TO POSN NBR	REPORTS TO JOB TITLE	REPORTS TO EMPID	REPORTS TO INCUMBENT
Elem Prep Teacher/Science	2024	1.000000	0003A	20007802			Active	<input checked="" type="checkbox"/>	20000953			
Elementary School Asst	6535	1.000000	0003A	20007724			Active	<input checked="" type="checkbox"/>	20000953			
Inschool Resource Tchr	2040	0.800000	0003A	30001109			Active	<input type="checkbox"/>	20000953	Principal		
Library Asst	6472	0.400000	0003A	20007924			Active	<input checked="" type="checkbox"/>				

**4**

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.

**4**

Look Up REPORTS TO POSN NBR

Position Number: begins with [ ]

Job Title: begins with [ ]

Business Unit: begins with [ ]

Department: begins with [ ]

Job Code: begins with [ ]

Incumbent Last Name: begins with [ ]

Incumbent First Name: begins with [ ]

Look Up    Clear    Cancel    Basic Lookup

Search Results

Only the first 300 results can be displayed.

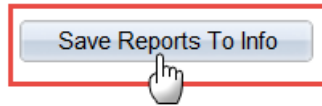
View 100      First [ ] 1-300 of 300 [ ] Last

Position Number	Job Title	Business Unit	Department	Job Code	Incumbent Last Name	Incumbent First Name
20000021	Supervising Admin Asst II	SDUSD	5539	6523		
20000025	Vice Principal	SDUSD	0346	1350		
20000071	Principal	SDUSD	0302	1305		
20000138	Vice Principal	SDUSD	0312	1350		
20000178	Dir--Trans and Dist Svs Dept	SDUSD	5850	1238		
20000182	Food Svcs Area Mgr	SDUSD	8357	8525		
20000199	Plant Ops Supv	SDUSD	5600	7524		
20000200	Principal	SDUSD	0235	1305		

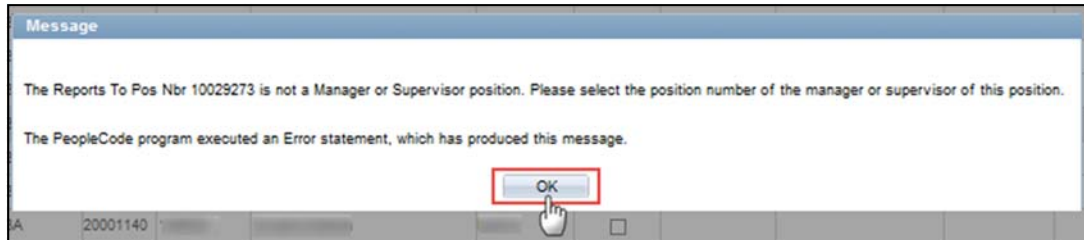
**NOTE:** Repeat **step 4** above until all **Reports To Position Numbers** have been completed and verified as accurate.

# How to Maintain Reports To Information

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. [Return To Search](#) 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.