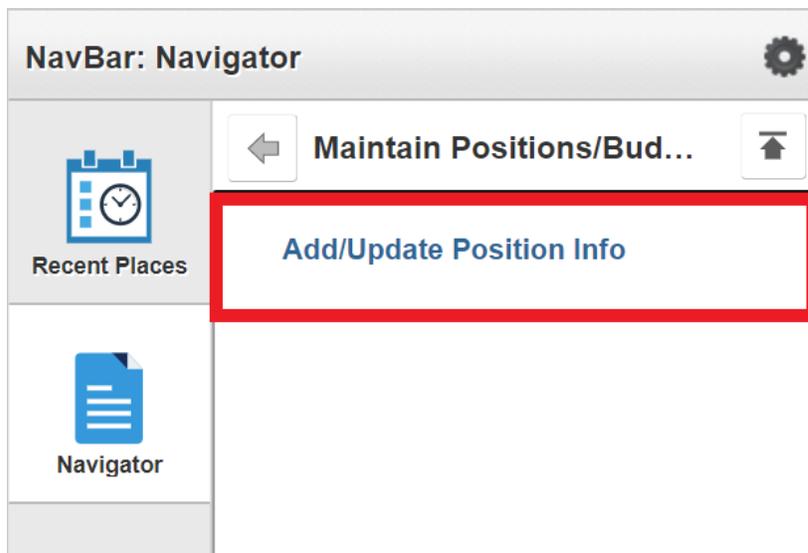


Updating the Reports-To Supervisor on Position Management

This process is used to update the reports-to supervisor for an employee through updating the employee's position on **Position Management**. Through updating the reports-to supervisor on Position, it will normally flow onto the employee's **Job Data**.

1. Navigate to *NavBar*> *Navigator*> *Organizational Development*> *Position Management*> *Maintain Positions/Budgets*> *Add/Update Position Info*



2. Search for the position using one of more of the criteria. Be sure to click on **Correct History** button prior to searching as multiple updates may be needed (see step 11).
 - **Note:** If you do not know the position number, you can check the employee's **Job Data** to get the position number.
 - **Business Unit** should default to your organization (LEG or OHA).

Add/Update Position Info

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

Position Number begins with ▾

Description begins with ▾

Position Status = ▾

Business Unit begins with ▾

Department begins with ▾

Job Code begins with ▾

Reports To Position Number begins with ▾

Status as of Effective Date = ▾

Include History Correct History Case Sensitive

Example of where to find the position number on **Job Data**:

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data Home Sign Out

HAWAII Information Portal Add To ▾ NavBar

New Window | Help | Personalize Page

Work Location Job Information Job Labor Payroll Salary Plan Compensation Hi Exec Job Job Earnings Distribution

Employee Empl ID [REDACTED]

Empl Record 0

Work Location Details Find First 1 of 1 Last

*Effective Date 10/16/2020 Active Payroll Active

Effective *Job Indicator Primary Job ▾

Sequence

*Action Conversion ▾

*Reason Conversion ▾

Position Number Y1000002 Admin Service Mgr Dist 01 Current

Position Entry Date 10/16/2020 Position Management Record

Regulatory Region STATE State of Hawaii

Company LEG Hawaii State Legislature

Business Unit LEG Hawaii State Legislature

Department 10001 House District 01

Department Entry Date 10/16/2020

Hawaii Org ID 00001 House of Representatives

Location LEG02 Hawaii State Legislature-Oahu Date Created 10/24/2020

Establishment ID EPAR Print

Legal Authority

254 characters remaining

Job Comments

Update the Position Number in HRMS due to conversion.

201 characters remaining

3. Click on the  button to add a row.
4. Enter the **Effective Date** of the reports-to change.
5. Change the **Reason** to **RTC** (Reports-To Change).

[Favorites](#) | [Main Menu](#) | [Organizational Development](#) | [Position Management](#) | [Maintain Positions/Budgets](#) | [Add/Update Position Info](#) | [Home](#) | [Sign Out](#)

[Add To](#) | [NavBar](#)

[New Window](#) | [Help](#) | [Personalize Page](#)

[Description](#) | [Specific Information](#) | [Budget and Incumbents](#) | [Position Data HI](#) | [Position Funding](#)

Position Information

Position Number Y1000002
 Headcount Status Filled
 *Effective Date 06/01/2021
 Reason RTC
 *Position Status Approved
 Status Date 06/01/2021

Current Head Count 1 out of 1
 *Status Active
 Action Date 06/30/2021
 Key Position

Job Information

*Business Unit LEG
 Job Code 1002
 *Reg/Temp Regular
 *Regular Shift Not Applicable
 Title Admin Service Mgr Dist 01

Hawaii State Legislature
 District Admin Service Mgr
 Ex/CS C
 *Full/Part Time Full-Time
 Union Code
 Short Title AdmMrg

[Detailed Position Description](#)

6. Scroll down the page to the **Work Location** section. Change the Position Number of the **Reports To** line.
 - Use the magnifying glass to look up position numbers, if needed.

[Favorites](#) | [Main Menu](#) | [Organizational Development](#) | [Position Management](#) | [Maintain Positions/Budgets](#) | [Add/Update Position Info](#) | [Home](#) | [Sign Out](#)

[HAWAII Information Portal](#) | [Add To](#) | [NavBar](#)

Work Location

*Reg Region State of Hawaii
 Department House District 01 Department ID Search Company LEG Hawaii State Legislature
 Location Hawaii State Legislature-Oahu
Reports To Asst Chief Clerk Dot-Line

Salary Plan Information

Salary Admin Plan Grade Step
 Standard Hours Work Period Weekly
 Mon Tue Wed Thu Fri Sat Sun

[USA](#)

FLSA Status Bargaining Unit

Look Up Reports To

[Help](#)

Position Number

Description

Business Unit

Department

Job Code

Position Status

Job Sharing Permitted

Reports To Position Number

 [Basic Lookup](#)

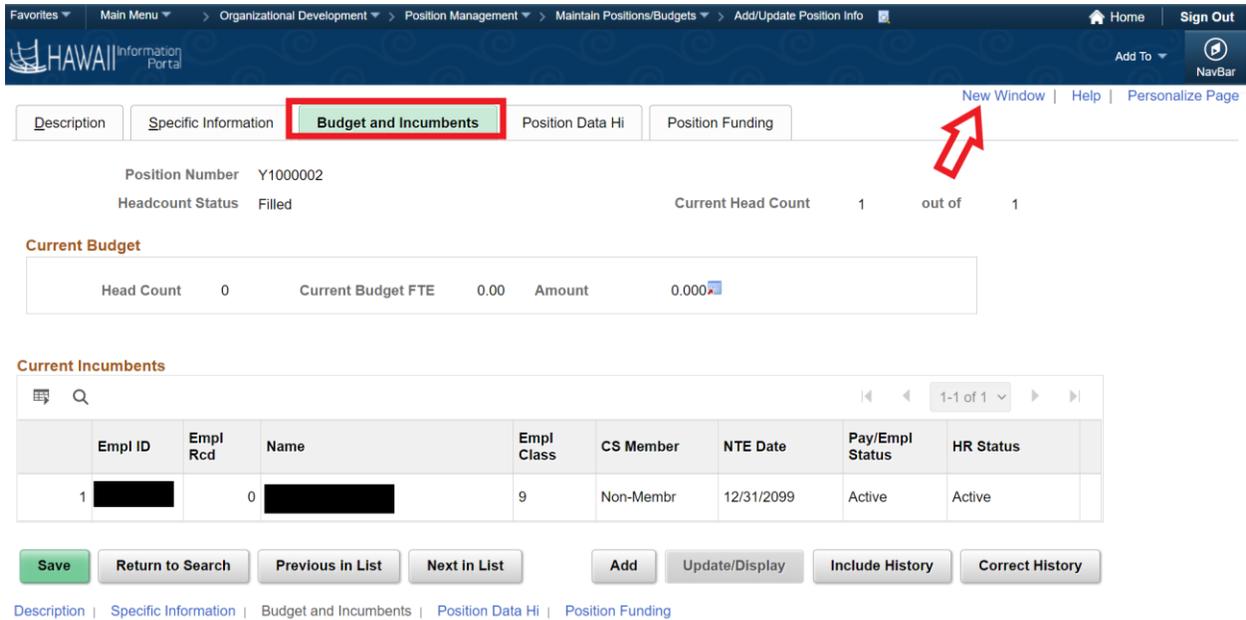
7. Click OK to save.
8. A warning message will pop up. Click OK to save the change.

Position data is updated for position Y1000002 with effective date 2021-06-01. (1000,1592)

Any change in position data would reset the compensation frequency from job code for all incumbents.

Are you sure you want to proceed with the changes?

9. Once completed, double-check the employee's **Job Data** screen to ensure the update was applied.
10. Navigate to the **Budget and Incumbents** tab, the employee currently in the position will be listed below. Copy the employee's ID number.
 - Open a new window to navigate to **Job Data**.



Position Number Y1000002
Headcount Status Filled
Current Head Count 1 out of 1

Current Budget

Head Count	0	Current Budget FTE	0.00	Amount	0.000
------------	---	--------------------	------	--------	-------

Current Incumbents

Empl ID	Empl Rcd	Name	Empl Class	CS Member	NTE Date	Pay/Empl Status	HR Status
1	0		9	Non-Membr	12/31/2099	Active	Active

Buttons: Save, Return to Search, Previous in List, Next in List, Add, Update/Display, Include History, Correct History

11. Using the new window, navigate to **Job Data** by going to *Main Menu > Workforce Administration > Job Information > Job Data*.
12. Paste the Employee ID into the **Employee ID** field.

Job Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Empl ID begins with ▾ | |

Empl Record = ▾

Name begins with ▾

Last Name begins with ▾

Second Last Name begins with ▾

Alternate Character Name begins with ▾

Middle Name begins with ▾

Include History Case Sensitive

Search Clear Basic Search  Save Search Criteria

13. Verify the effective date is the same as the date updated in Position. The **Action/Reason** will be auto populated with the following.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

Home Sign Out

Add To ▾ NavBar

New Window | Help | Personalize Page

Work Location Job Information Job Labor Payroll Salary Plan Compensation Hi Exec Job Job Earnings Distribution

Employee Empl ID [REDACTED] Empl Record 0

Work Location Details ? Find First 1 of 1 Last

*Effective Date 06/01/2021 HR Status Active

Effective Sequence 0

*Action Position Change

*Reason Reports To Change

Payroll Active Status

*Job Indicator Primary Job

Position Number Y1000002 Admin Service Mgr Dist 01

Override Position Data

Position Entry Date 10/16/2020

Position Management Record

Regulatory Region STATE State of Hawaii

Company LEG Hawaii State Legislature

Business Unit LEG Hawaii State Legislature

Department 10001 House District 01

Department Entry Date 10/16/2020

Hawaii Org ID 00001 House of Representatives

Location LEG02 Hawaii State Legislature-Oahu

Establishment ID

Legal Authority

254 characters remaining

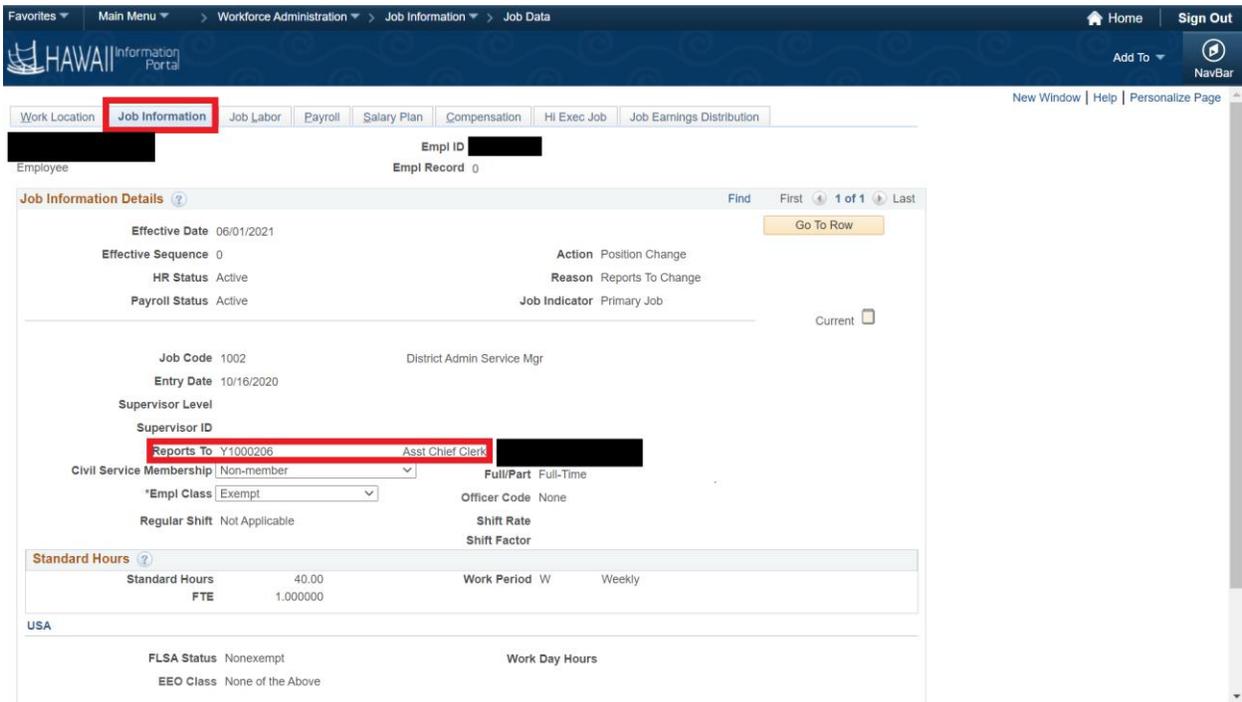
Job Comments

254 characters remaining

Date Created 06/30/2021

EPAR Print

14. Navigate to the **Job Information** tab and verify the **Reports-To** section is updated with the new supervisor.



The screenshot shows the 'Job Information Details' page for an employee. The 'Reports To' field is highlighted in red and contains the value 'Y1000206 Asst Chief Clerk'. Other visible details include:

- Effective Date:** 06/01/2021
- Effective Sequence:** 0
- HR Status:** Active
- Payroll Status:** Active
- Job Code:** 1002 (District Admin Service Mgr)
- Entry Date:** 10/16/2020
- Supervisor Level:** Supervisor ID [Redacted]
- Reports To:** Y1000206 Asst Chief Clerk
- Civil Service Membership:** Non-member
- Full/Part:** Full-Time
- *Empl Class:** Exempt
- Officer Code:** None
- Regular Shift:** Not Applicable
- Shift Rate:** [Redacted]
- Shift Factor:** [Redacted]
- Standard Hours:** 40.00
- FTE:** 1.000000
- Work Period:** W Weekly
- FLSA Status:** Nonexempt
- EEO Class:** None of the Above
- Work Day Hours:** [Redacted]

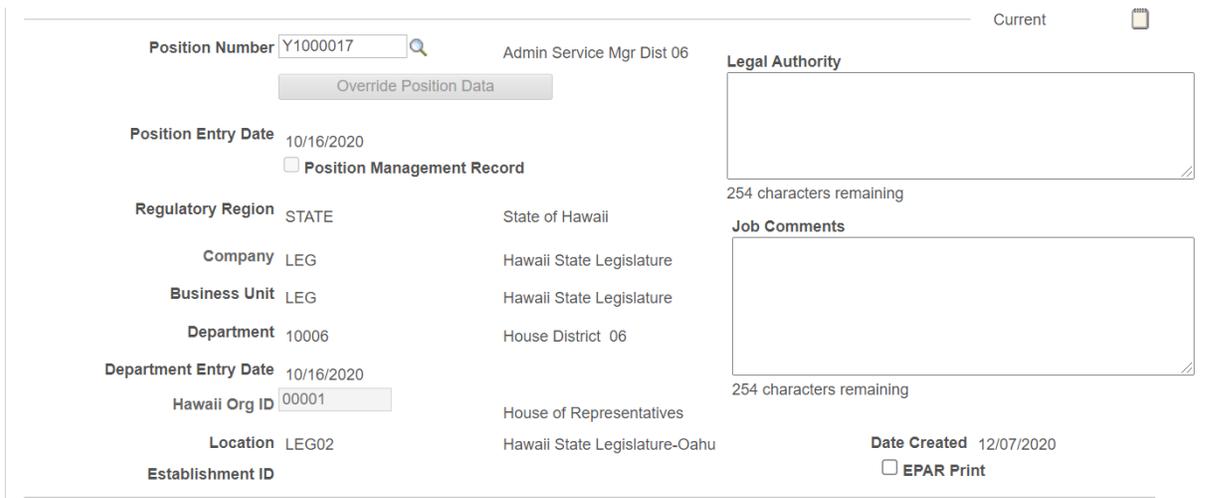
Additional Notes Regarding Job Data and Position Updates

1. The standard is that information that is on Position Management should be in sync with the employee’s Job Data and employment records.
2. **Do not** use the Override Position Data button that is found on Job Data. Using this button causes a “disconnect” with Position Management, meaning that any updates made to their position with this override button active will not flow to Job Data.

Override Position Data

3. To know if the employee’s position data is being overridden or not, the Override Position Data button will say ‘Use Position Data’ instead and a lot of the fields will be open (e.g. become editable, if Position data is being overridden).

When Position data is not being overridden



Current 

Position Number  Admin Service Mgr Dist 06

Position Entry Date 

Position Management Record

Regulatory Region State of Hawaii

Company Hawaii State Legislature

Business Unit Hawaii State Legislature

Department House District 06

Department Entry Date 

Hawaii Org ID House of Representatives

Location Hawaii State Legislature-Oahu

Establishment ID

Legal Authority

254 characters remaining

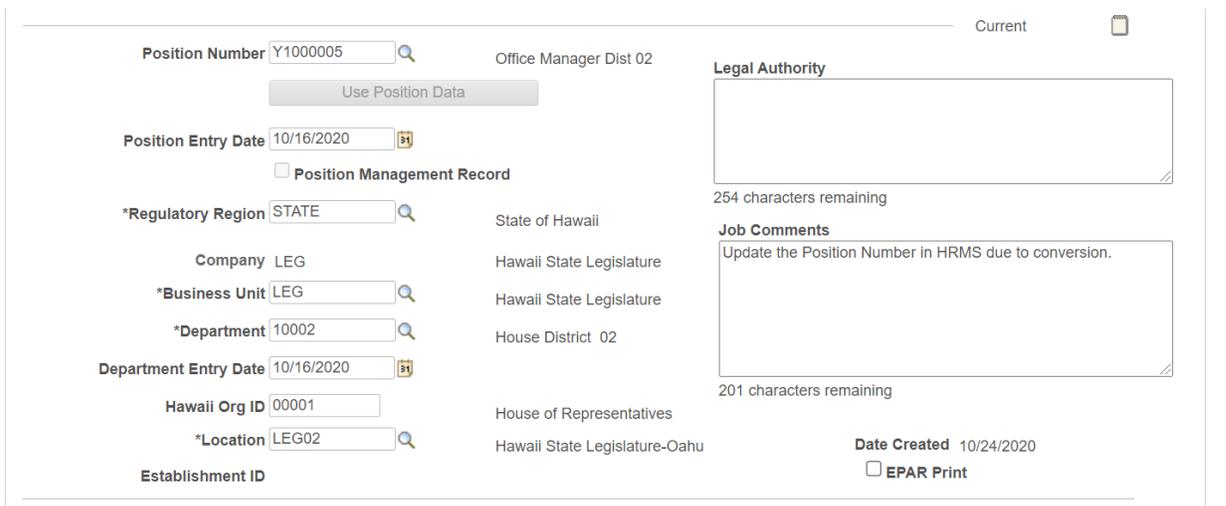
Job Comments

254 characters remaining

Date Created 12/07/2020

EPAR Print

When Position data is being overridden



Current 

Position Number  Office Manager Dist 02

Position Entry Date 

Position Management Record

*Regulatory Region  State of Hawaii

Company Hawaii State Legislature

*Business Unit  Hawaii State Legislature

*Department  House District 02

Department Entry Date 

Hawaii Org ID House of Representatives

*Location  Hawaii State Legislature-Oahu

Establishment ID

Legal Authority

254 characters remaining

Job Comments

Update the Position Number in HRMS due to conversion.

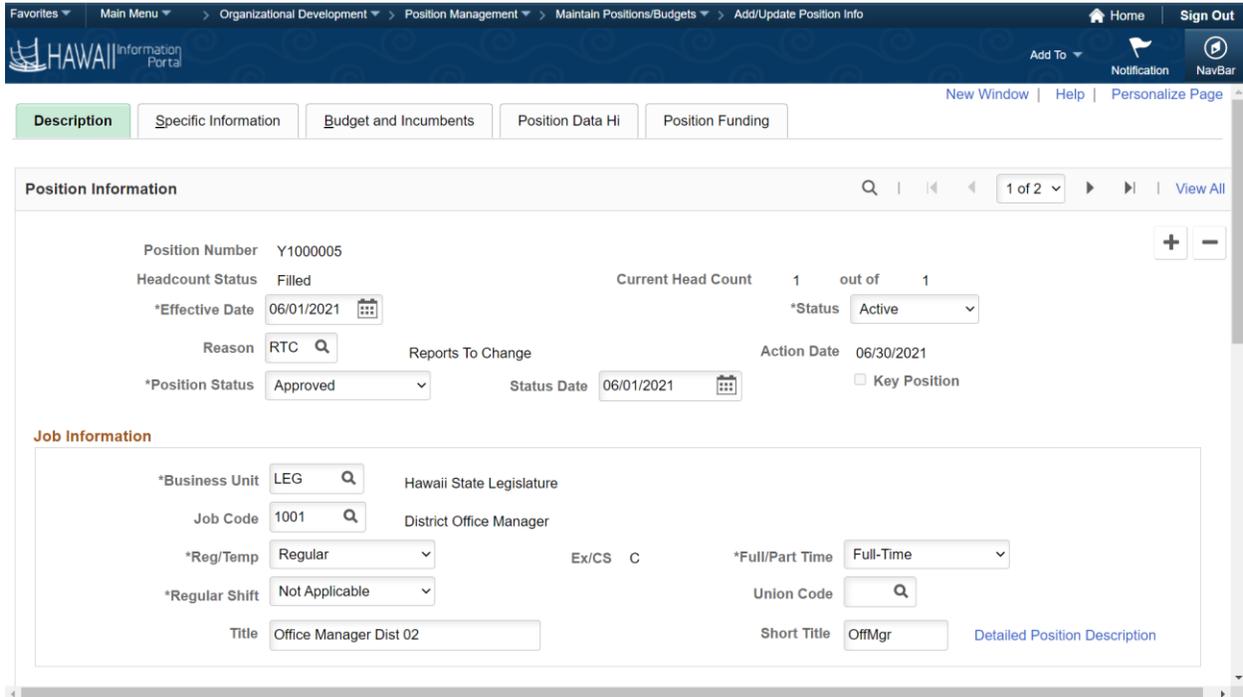
201 characters remaining

Date Created 10/24/2020

EPAR Print

4. To update the position data for an employee whose Position data is being overridden on Job, you will need to complete the update on Position Management first.
 - a. In this scenario, a reports-to update was made effective June 1, 2021.

Add a row on Position Management, then change the Effective Date and Reason.



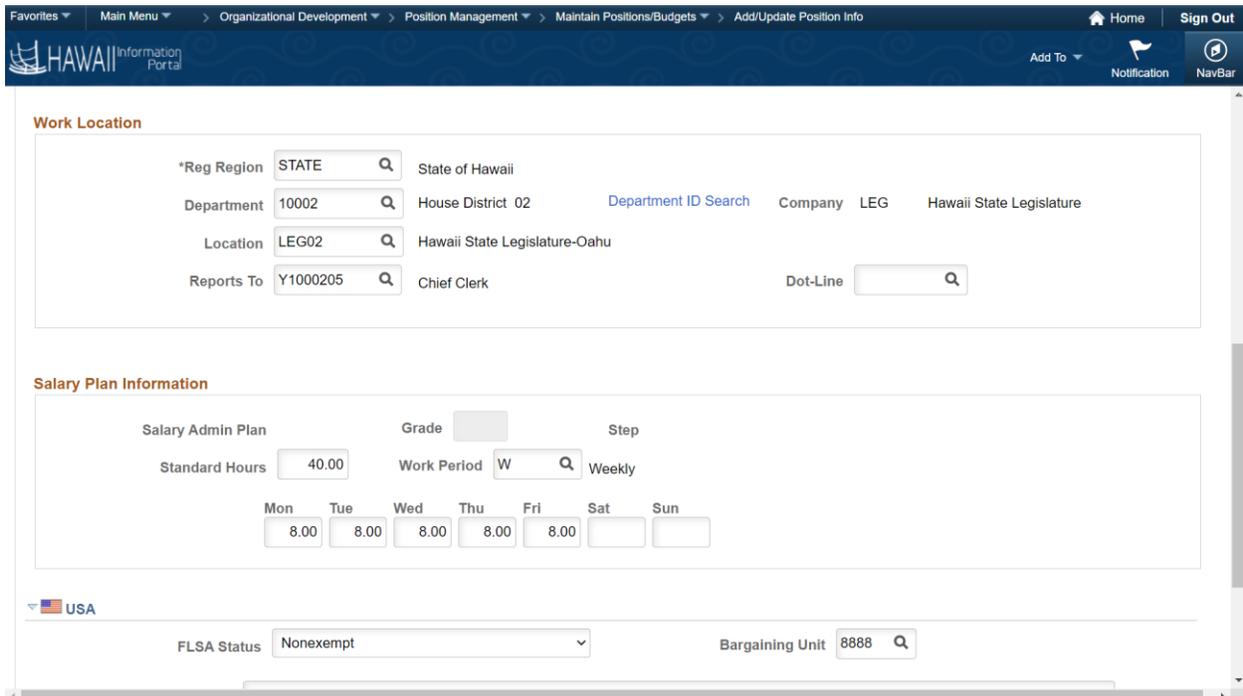
Position Information

Position Number: Y1000005
 Headcount Status: Filled
 Current Head Count: 1 out of 1
 *Effective Date: 06/01/2021
 *Status: Active
 Reason: RTC
 Reports To Change: []
 Action Date: 06/30/2021
 *Position Status: Approved
 Status Date: 06/01/2021
 Key Position

Job Information

*Business Unit: LEG (Hawaii State Legislature)
 Job Code: 1001 (District Office Manager)
 *Reg/Temp: Regular
 Ex/CS: C
 *Full/Part Time: Full-Time
 *Regular Shift: Not Applicable
 Union Code: []
 Title: Office Manager Dist 02
 Short Title: OffMgr
[Detailed Position Description](#)

Then change the reports-to position number and click Save.



Work Location

*Reg Region: STATE (State of Hawaii)
 Department: 10002 (House District 02)
 Location: LEG02 (Hawaii State Legislature-Oahu)
 Reports To: Y1000205 (Chief Clerk)
 Dot-Line: []

Salary Plan Information

Salary Admin Plan: []
 Standard Hours: 40.00
 Grade: []
 Step: []
 Work Period: W (Weekly)
 Mon: 8.00, Tue: 8.00, Wed: 8.00, Thu: 8.00, Fri: 8.00, Sat: [], Sun: []

FLSA Status: Nonexempt
 Bargaining Unit: 8888

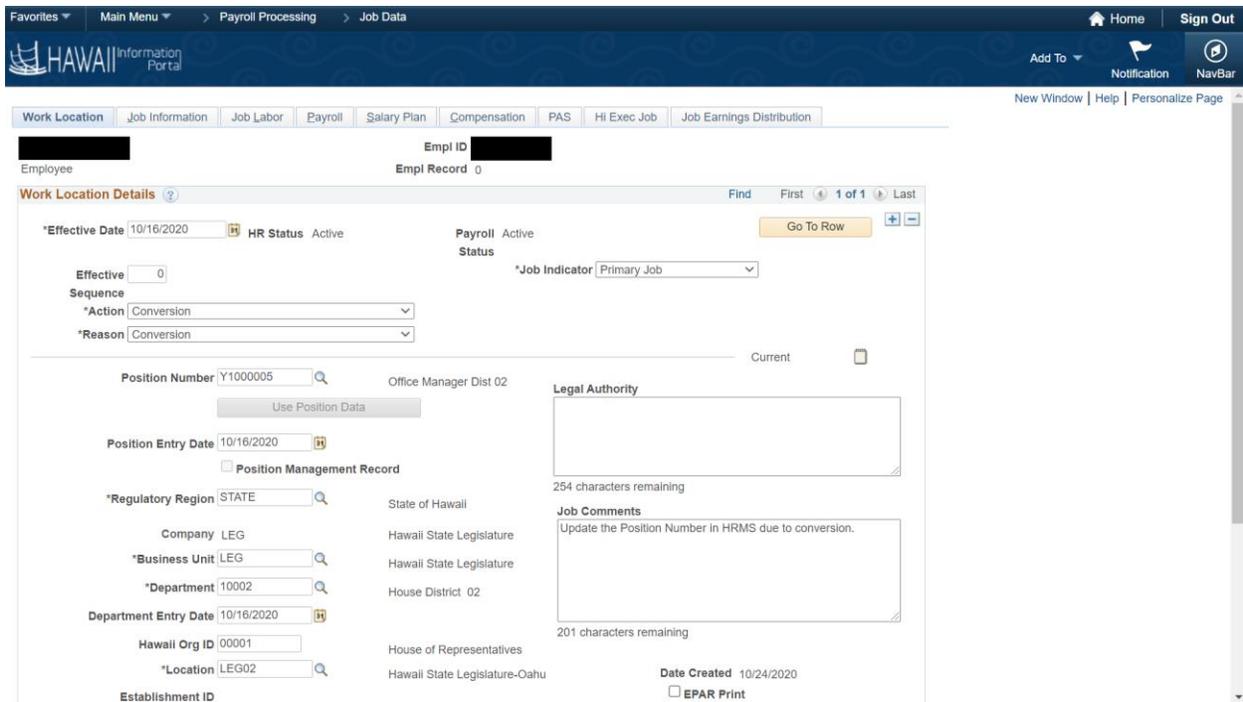
- b. You will see a message that there was no update to the incumbent (EMPLID) because position data has been overridden.

No changes made for incumbent number [REDACTED] because position data has been overridden. (1000,196)

A current incumbent has overrides to the data for their position. There will be no automatic updates to their job or employment data. The position override flag is located on the Work Location page in Job Data.

- 5. Then, the update will need to be made manually on Job Data using a similar Action/Reason combination.

Job Data view prior to the update.



The screenshot shows the 'Work Location Details' page in the Hawaii Information Portal. The employee's name is [REDACTED] and their Empl ID is [REDACTED]. The page displays various fields for job data, including:

- Effective Date:** 10/16/2020
- HR Status:** Active
- Payroll Status:** Active
- Job Indicator:** Primary Job
- Position Number:** Y1000005
- Office Manager:** Dist 02
- Position Entry Date:** 10/16/2020
- Regulatory Region:** STATE
- Company:** LEG
- Business Unit:** LEG
- Department:** 10002
- Department Entry Date:** 10/16/2020
- Hawaii Org ID:** 00001
- Location:** LEG02
- Establishment ID:** [REDACTED]

The 'Job Comments' section contains the text: "Update the Position Number in HRMS due to conversion." The page also includes a 'Go To Row' button and a 'Date Created' field showing 10/24/2020.

Add a row, then change the effective date, action, and reason.

[Favorites](#) | [Main Menu](#) | [Payroll Processing](#) | [Job Data](#) | [Home](#) | [Sign Out](#)

[HAWAII Information Portal](#) | [Add To](#) | [Notification](#) | [NavBar](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [PAS](#) | [Hi Exec Job](#) | [Job Earnings Distribution](#)

Employee [Redacted] Empl ID [Redacted] Empl Record 0

Work Location Details Find First 1 of 2 Last

*Effective Date 06/01/2021 HR Status Active
 Effective Sequence 0
 *Action Position Change
 *Reason Reports To Change

Payroll Status Active *Job Indicator Primary Job
 Go To Row

Position Number Y1000005 Office Manager Dist 02
 Use Position Data

Position Entry Date 10/16/2020
 Position Management Record

*Regulatory Region STATE State of Hawaii
 Company LEG Hawaii State Legislature
 *Business Unit LEG Hawaii State Legislature
 *Department 10002 House District 02
 Department Entry Date 10/16/2020
 Hawaii Org ID 00001 House of Representatives
 *Location LEG02 Hawaii State Legislature-Oahu
 Establishment ID

Legal Authority
 254 characters remaining
 Job Comments
 254 characters remaining

Date Created 06/30/2021
 EPAR Print

Then manually update the position reports to number to update the reports-to for this employee, then click Save.

[Favorites](#) | [Main Menu](#) | [Payroll Processing](#) | [Job Data](#) | [Home](#) | [Sign Out](#)

[HAWAII Information Portal](#) | [Add To](#) | [Notification](#) | [NavBar](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#) | [PAS](#) | [Hi Exec Job](#) | [Job Earnings Distribution](#)

Employee [Redacted] Empl ID [Redacted] Empl Record 0

Job Information Details Find First 1 of 6 Last

Effective Date 06/01/2021
 Effective Sequence 0
 HR Status Active
 Payroll Status Active
 Action Position Change
 Reason Reports To Change
 Job Indicator Primary Job
 Go To Row

*Job Code 1001 District Office Manager
 Entry Date 10/16/2020
 Supervisor Level
 Supervisor ID
 Reports To Y1000205 Chief Clerk
 Civil Service Membership Non-member *Full/Part Full-Time
 *Empl Class Exempt Officer Code None
 *Regular Shift Not Applicable Shift Rate
 Shift Factor

Standard Hours
 Standard Hours 40.00 Work Period W Weekly
 FTE 1.000000

Contract Number
 Contract Number
 Contract Type
 Next Contract Number