

# **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

NavBar: Navigator				
	Maintain Positions/Bud			
Recent Places	Add/Update Position Info			
Navigator				

- 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).



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Add/Update Position In	nfo	Leave fields blank for a list of all u	aluas	New Window	Help 📤
Find an Existing Value	Add a New Val	ue	aues.		
Search Criteria					
Position Number	begins with $$				- 1
Description	begins with $$				- 1
Position Status	= ~		×		- 1
Business Unit	begins with $$	LEG Q			- 1
Department	begins with $$	٩			- 1
Job Code	begins with $$	٩			- 1
Reports To Position Number	begins with $$				- 1
Status as of Effective Date	= ~		v		
Include History     Correct	History 🗆 Cas	e Sensitive			

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

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Sequence							
*Action Conversion		-					
*Reason Conversion							
Position Number	Y1000002 Q Adn	nin Service Mgr Dist 01	Legal Authority		_		
Position Number	V1000002 Q Adn Override Position Data	nin Service Mgr Dist 01	Legal Authority				
Position Number	Y1000002 Q Adn Override Position Data 10/16/2020 Position Management Record	nin Service Mgr Dist 01	Legal Authority				
Position Number	Y1000002     Q     Adm       Override Position Data     10/16/2020       Position Management Record	nin Service Mgr Dist 01	Legal Authority		11		
Position Number Position Entry Date Regulatory Region	Y1000002         Q         Adm           Override Position Data         10/16/2020         Position Management Record           STATE         Stat	nin Service Mgr Dist 01	Legal Authority 254 characters remaining Job Comments		1		
Position Number Position Entry Date Regulatory Region Company	V1000002 Q Adm Override Position Data 10/16/2020 Position Management Record STATE Stat LEG Haw	nin Service Mgr Dist 01	Legal Authority 254 characters remaining Job Comments Update the Position Number in HRMS	due to conversion.			
Position Number Position Entry Date Regulatory Region Company Business Unit	V1000002 Q Adm Override Position Data 10/16/2020 Position Management Record STATE Stat LEG Haw LEG Haw	nin Service Mgr Dist 01	Legal Authority 254 characters remaining Job Comments Update the Position Number in HRMS	due to conversion.			
Position Number Position Entry Date Regulatory Region Company Business Unit Department	V1000002 Q Adm Override Position Data 10/16/2020 Position Management Record STATE Stat LEG Haw LEG Haw 10001 Hou	nin Service Mgr Dist 01 e of Hawali vali State Legislature vali State Legislature se District 01	Legal Authority 254 characters remaining Job Comments Update the Position Number in HRMS	due to conversion.			
Position Number Position Entry Date Regulatory Region Company Business Unit Department Department	V1000002 Q Adri Override Position Data 10/16/2020 Position Management Record STATE Stat LEG Haw LEG Haw 10001 Hou 10/16/2020	nin Service Mgr Dist 01 e of Hawali rali State Legislature rali State Legislature se District 01	Legal Authority 254 characters remaining Job Comments Update the Position Number in HRMS 204 characters remaining	due to conversion.			
Position Number Position Entry Date Regulatory Region Company Business Unit Department Department Entry Date Hawaii Org ID	Y1000002     Adm       Override Position Data       10/16/2020       Position Management Record       STATE       LEG       Haw       10001       Hou       10/16/2020       00001	nin Service Mgr Dist 01 e of Hawali rail State Legislature rail State Legislature se District 01 se of Representatives	Legal Authority 254 characters remaining Job Comments Update the Position Number in HRMS 201 characters remaining	due to conversion.			
Position Number Position Entry Date Regulatory Region Company Business Unit Department Department Hawaii Org ID Location	Y1000002         Adm           Override Position Data         10/16/2020           Position Management Record         Stat           STATE         Stat           LEG         Haw           10001         Hou           10/16/2020         00001           Begins and the second         Hou	nin Service Mgr Dist 01	Legal Authority 264 characters remaining Job Comments Update the Position Number in HRMS 201 characters remaining Date Created 107	due to conversion.			

- 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).



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escription Specific Inform	tion Budget and Incumbents Position Data Hi Position Funding	lelp   Personalize Pag
sition Information	Q    4 4 1of2 ~	View All
Position Numbe Headcount Statu *Effective Date Reasor *Position Status	Y1000002 Filled (4) Object Head Count 1 out of 1 *Status Active RTC Q Reports To Change Action Date 06/30/2021 Approved Status Date 06/01/2021 E	+ - (3)
*Business U Job Co	It     LEG     Q       Hawaii State Legislature       I002     Q       District Admin Service Mgr	
*Reg/Ter	P Regular   Ex/CS C *Full/Part Time  Full-Time  Victor Sector	
*Regular Sh		

- 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.



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Work	Location										
		*Reg Region	STATE Q	State of Hawaii							
		Department	10001 <b>Q</b>	House District 01	Depar	tment ID Sear	ch Company	LEG H	awaii State Legislature		
		Location	LEG02 Q	Hawaii State Legisla	ature-Oahu						
		Reports To	Y1000206 Q	Asst Chief Clerk			Dot-Line		Q		
Salary	Plan Informa	ation									
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	St	andard Hours	40.00	Work Period W	Q Weekky						
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4							) b				

- 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?

Yes	No

- 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*.

orites 🔻	Main Menu 🔻	> Organi	zational Development 🔻 > P	osition Management	💌 > Maintain I	Positions/Budgets 🔻	Add/Update Position	n info 🔯		🟫 Home	Sign
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Description	n <u>S</u> pe	cific Informat	ion Budget and In	cumbents	Position Data	Hi Positio	on Funding		<b>5</b>		
	Positio	Number	Y1000002						4		
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Irrent B	udget										
	Head Coun	t 0	Current Budget	TE 0.00	Amount	0.000					
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,	Empl ID	Empl Rcd	Name		Empl Class	CS Member	NTE Date	Pay/Empl Status	HR Status		
1		C			9 1	Non-Membr	12/31/2099	Active	Active		
1		C			9 1	Non-Membr	12/31/2099	Active	Active		
1 Save	Return to	0 Search	Previous in List	Next in List	9 1	Non-Membr	12/31/2099 late/Display	Active	Active Correct Histor	ry	
1 Save	Return to	0 Search	Previous in List	Next in List	9 1	Add Upc	12/31/2099 late/Display	Active	Active Correct Histor	ry	

- 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.



Favorites 🔻	Main Menu 🔻	>	Workforce Administration 🔻	>	Job Information 🔻 >	Job Data
<b>运</b> HAW	All Information Portal	C				

### 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 w	th 🗸
Empl Record =	✓
Name begins w	th 🗸
Last Name begins w	th 🗸
Second Last Name begins w	th 🗸
Alternate Character Name begins w	th 🗸
Middle Name begins w	th 🗸
Include History     Case Sensitive	tive
Search Clear Basic Sea	rch 📮 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 🔻 > J	ob Data		A Home	Sign Out
HAWAII Information Portal			le de	Add To 🔻	NavBar
Work Location Job Information	Job Labor Payroll Salary Plan Compensation	I HI Exec Job Job Earnings Distribution		New Window   Help   Persona	alize Page 🔺
Work Location Details (2)		Find	First 🚯 1 of 1 🛞 Last		
*Effective Date 06/01/2021 Effective 0 Sequence *Action [Position Change *Reason Reports To Chan Position Number	Image: New Year of the Payroll Area       Y1000002     Q       Admin Service Mgr Dist       Override Position Data	tive *Job Indicator Primary Job ~ Cu 01 Legal Authority	Go To Row		
Position Entry Date	10/16/2020		11		- 1
Regulatory Region	STATE State of Hawaii	254 characters remaining Job Comments			- 1
Company	LEG Hawaii State Legislature	6			
Business Unit	LEG Hawaii State Legislature	6			
Department	10001 House District 01				
Department Entry Date	10/16/2020	254 obstactors romaining	11		
Hawaii Org ID	00001 House of Representative	204 characters remaining 95			
Location	LEG02 Hawaii State Legislature	-Oahu Date Created 06/30	0/2021		
Establishment ID		EPAR Print			-



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

Favorites  Main Menu  Workforce Administration  Job Information  Job Data	👚 Home 📗 Sign Out
HAWAII Information Portal	Add To 🔻 🕖 NavBar
Work Location         Job Information         Job Labor         Payroll         Salary Plan         Compensation         HI Exec Job         Job Earnings Distribution	New Window   Help   Personalize Page
Employee Empl Record 0	
Job Information Details (2) Find First (4)	1 of 1 🛞 Last
Effective Date 06/01/2021 Go To	Row
Effective Sequence     Action     Position Change       HR Status     Active     Reason     Reports To Change       Payroll Status     Active     Job Indicator     Primary Job	irrent
Job Code 1002 District Admin Service Mgr Entry Date 10/16/2020 Supervisor Level	
Reports to 10     Reports to 11000206     Asst Chief Clerk       Civil Service Membership Non-member     V     Full/Part Full-Time       *Empl Class Exempt     V     Officer Code None       Regular Shift Not Applicable     Shift Rate       Shift Rator	
Standard Hours 👔	
Standard Hours 40.00 Work Period W Weekly FTE 1.000000	
USA	
FLSA Status         Nonexempt         Work Day Hours           EEO Class         None of the Above	



## 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	Y1000017	Q	Admin Service Mgr Dist 06	Legal Authority		
[	Override	Position Data				
Position Entry Date	10/16/2020					
	Position Ma	nagement Rec	ord			/
Permitten Perion				254 characters remaining		
Regulatory Region	STATE		State of Hawaii	Job Comments		
Company	LEG		Hawaii State Legislature			
Business Unit	LEG		Hawaii State Legislature			
Department	10006		House District 06			
Department Entry Date	10/16/2020					//
Hawaii Org ID	00001			254 characters remaining		
			House of Representatives			
Location	LEG02		Hawaii State Legislature-Oahu	Date Created	12/07/2020	
Establishment ID				EPAR Pri	int	



				Cur	rrent (	
Position Number	Y1000005	Q	Office Manager Dist 02	Legal Authority		
	Use Po	sition Data				
Position Entry Date	10/16/2020	31				
	Position Man	agement Reco	ord			11
*Regulatory Region	STATE	Q	State of Hawaii	254 characters remaining Job Comments		
Company	LEG		Hawaii State Legislature	Update the Position Number in HRMS du	ue to conversion.	
*Business Unit	LEG	Q	Hawaii State Legislature			
*Department	10002	Q	House District 02			
Department Entry Date	10/16/2020	31				11
Hawaii Org ID	00001		House of Representatives	201 characters remaining		
*Location	LEG02	Q	Hawaii State Legislature-Oahu	Date Created 10/24	/2020	
Establishment ID				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.

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Description Specific Informa	ion Budget and Incumbents Position Data Hi Position Funding	Help   Persona	alize Page
osition Information	Q    4 4 1 of 2	× • •	View Al
Position Number	Y1000005		+ –
Headcount Status	Filled Current Head Count 1 out of 1		
*Effective Date	06/01/2021 **** Active ~		
Reason	RTC Q Reports To Change Action Date 06/30/2021		
*Position Status	Approved V Status Date 06/01/2021		
Job Information			
*Business Unit	LEG Q Hawaii State Legislature		
Job Code	1001 Q District Office Manager		
*Reg/Temp	Regular V Ex/CS C *Full/Part Time Full-Time V		
*Regular Shift	Not Applicable ~ Union Code Q		
Title	Office Manager Dist 02 Short Title OffMgr Detailed P	osition Description	
			)

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

vorites 🔻 🛛 Main Menu 🔻 > Organiza	tional Development 🔻 >	Position Management 🔻 > M	aintain Positions/Budgets 🔻 > 🗛	ld/Update Position Info		🏫 Home	Sign Out
HAWAII Information Portal					Add To 🔻	Notification	NavBa
Work Location							
*Reg Region	STATE Q	State of Hawaii					
Department	10002 <b>Q</b>	House District 02	Department ID Search	Company LEG	Hawaii State Legislature		
Location	LEG02 Q	Hawaii State Legislature	e-Oahu				
Reports To	Y1000205 <b>Q</b>	Chief Clerk		Dot-Line	Q		
Salary Admin Plan		Grade	Step				
Salary Admin Plan		Grade	Step				
Standard Hours	40.00	Work Period W C	Weekly				
	Mon Tue V 8.00 8.00	Ved         Thu         Fri           8.00         8.00         8.00	Sat Sun				
<b>▽■</b> USA							
	Nonexempt		× Bar	naining Unit 8888	2		
FLSA Status	Honexempt		Dai	gaining office of the			



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 numb (1000,196)	because position data has been overridden.
A current incumbent has overrides to the updates to their job or employment dat Location page in Job Data.	ne data for their position. There will be no automatic a. The position override flag is located on the Work
	ОК

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.

Favorites ▼ Main Menu ▼ > Payroll Processing >	Job Data		🏫 Home 🔰 Sign C	Dut
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*Action Conversion	~			
*Reason Conversion	~			
Position Number 11000005	Office Manager Dist 02	Current		l
Position Entry Date 10/16/2020				l
Position Managemen	t Record	254 characters remaining		
*Regulatory Region STATE	State of Hawaii	Job Comments		
Company LEG	Hawaii State Legislature	Update the Position Number in HRMS due to conversion.		
*Business Unit LEG Q	Hawaii State Legislature			
*Department 10002	House District 02			
Department Entry Date 10/16/2020		15		
Hawaii Org ID 00001	House of Representatives	201 characters remaining		
*Location LEG02	Hawali State Legislature-Oahu	Date Created 10/24/2020		
Establishment ID		EPAR Print		•

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



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						Add To 👻	Notification	() NavBa
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*Effective Date 06/01/2021 Effective 0 Sequence *Action (Position Change *Reason (Reports To Change	HR Status	Active	Payroll Active Status *Job I	ndicetor [Primary Job 🛛 🗸	Go To Row			
Position Number	Y1000005	Q	Office Manager Dist 02	Cu	urrent			
	Use P	osition Data	Onice Manager Dist 02	Legal Authority				
Position Entry Date	10/16/2020	(H)						
	Position Man	agement Reco	rd		1			
*Regulatory Region	STATE	Q	State of Hawaii	254 characters remaining Job Comments				
Company	LEG		Hawaii State Legislature					
*Business Unit	LEG	Q	Hawaii State Legislature					
*Department	10002	Q	House District 02					
Department Entry Date	10/16/2020	Ħ			15			
Hawaii Org ID	00001		House of Representatives	254 characters remaining				
*Location	LEG02	Q	Hawaii State Legislature-Oahu	Date Created 06/30	0/2021			
Establishment ID				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 >	ob Data 🔤	🟫 Home 🔰 Sign Out
HAWAII Information Portal		Add To 👻 🚩 🙆 Notification NavBar
Work Location Job Information Job Labor Payroll Employee	Question         PAS         Hi Exec Job         Job Earnings Distribution           Empi ID         Empi Record 0         0 <th>New Window   Help   Personalize Page 🛆</th>	New Window   Help   Personalize Page 🛆
Job Information Details 👔	Find First () 1 of () Last	
Effective Date 06/01/2021  Effective Sequence 0  HR Status Active Payroll Status Active  *Job Code 1001 Entry Date 10/16/2020  Supervisor Level Supervisor ID Reports To Y1000205	Action Position Change Reason Reports To Change Job Indicator Primary Job Current District Office Manager	
Civil Service Membership   Non-member *Empl Class   Exempt *Regular Shift   Not Applicable		
Standard Hours ②           Standard Hours ④           40.00           FTE 1.000000	Work Period Weekly	
Contract Number ② Contract Number	Next Contract Number	