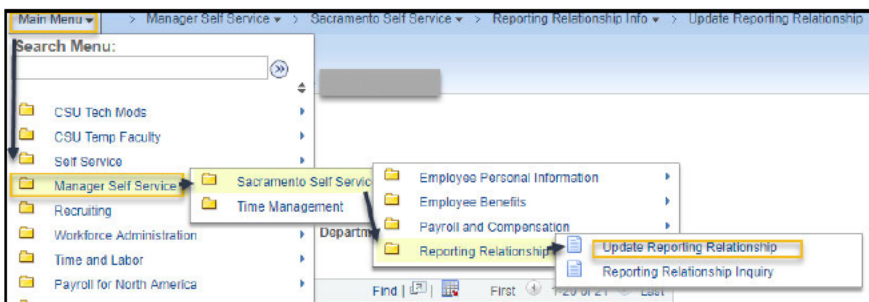


Update Reporting Relationships through the Manager Self Service CMS HR portal

Outside of the Budget, Planning & Administration office, both College and Division analysts can process batch updates to their area's "reports-to" through the CMS HR *Manager Self Service* portal. This portal gives the analyst access to make updates to employees with individual position numbers. However, for 'pool' positions, such as student workers and lecturers, these employees share a position number and will need to have their "reports-to" updated through a separate process (see Budget Planning & Administration [forms](#)).

1. Verify you have access, by going into CMS HR – Main Menu – Manager Self Service – Sacramento Self Service.
 - a. If you don't see the path, then you don't have access. Request access by placing a CARS request.
2. Once access is gained, go to "Update Reporting Relationship".



3. Start by looking up the employee's **EXISTING** reports-to/supervisor.

A screenshot of the 'Maintain Reporting Relationship' form. It contains two sections for supervisor information. The top section is for the 'Current or Previous Supervisor' and includes fields for 'Supervisor ID-POS#', 'Name', and 'Department', with a 'Refresh' button. Below this is a table titled 'Direct Reports For %1' with columns for Name, Employee ID, Rcdif, Job Title, Department, and Notes. The bottom section is for the 'New Supervisor' and includes fields for 'Supervisor ID-POS#', 'Name', 'Department', and 'Effective Date' (with a calendar icon), and a 'Submit' button. A note at the bottom states: 'Note: By submitting this change, all selected employees will report to the new supervisor as indicated above.'A screenshot of the 'Look Up Supervisor ID-POS#' search form. It features several search criteria fields, each with a 'begins with' dropdown menu: Supervisor/Manager ID, Employee ID, Last Name, First Name, Position Number, Effective Date (with a date picker), and Department. At the bottom, there are 'Look Up', 'Clear', and 'Cancel' buttons, and a 'Basic Lookup' link. Below the search fields, it says 'Search Results' and 'Only the first 300 results can be displayed.' with a 'View 100' link.

- When the existing supervisor is selected, the system will bring up all of the employee's that report to them.
- Select the individuals to update (aka to change who they report-to).

Supervisor ID-POS#: Name: Paul Serafimidis
 Position No. & Title: 00008934 Fac Svcs Administrator III Department: Facilities Management

Direct Reports For Paul Serafimidis

Name	Employee ID	Rcd#	Job Title	Department	Notes
<input type="checkbox"/> Blair, Timothy	150007442	9	PLUMBER	Facilities Mgmt	
<input checked="" type="checkbox"/> Boehl, Glen	217361344	9	LD SUPERVISOR	Dorchester MA	
<input checked="" type="checkbox"/> Carpenter, David	218851987	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Castanon, Michael	217319598	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Davis, Johnathan	212488223	9	CARPORT SVCS	Dorchester MA	
<input checked="" type="checkbox"/> Gallegos, Rudy	212356366	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Gutierrez, Jesus	212117708	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Knorr, Dale	212048311	9	PCPUS DRP	Dorchester MA	
<input checked="" type="checkbox"/> Marquez, Juan	20200433	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Ochoa-Avvaro, Jaime	227008608	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Perrin, Matthew	192004802	9	AUTO DRIVER	Plum Dept	
<input checked="" type="checkbox"/> Plumley, Joseph	227008642	9	CARPENTER SVCS	Dorchester MA	
<input checked="" type="checkbox"/> Raya, Alejandro	211400677	9	GRDTRK	Plum Dept	
<input checked="" type="checkbox"/> Reclusado, Dominador	192008810	9	WELD SVCS	Dorchester MA	
<input checked="" type="checkbox"/> Rich, Larry	191003425	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Sanchez, Luis	218851889	9	GRDTRK	Dorchester MA	
<input type="checkbox"/> Skall, Erik	152000427	9	ADMIN 1	Dorchester MA	
<input checked="" type="checkbox"/> Solo, Jose	214307088	9	GRDTRK	Dorchester MA	
<input checked="" type="checkbox"/> Teves, Chardik	218851209	9	GRDTRK	Plum Dept	
<input type="checkbox"/> Todd, Ryan	192008802	9	WELD SVCS	Dorchester MA	

- Now it's time to select the **NEW** supervisor/reports-to. Click on the search tool to find the new supervisor.

New Supervisor Employee ID-RCD-POS #:

Supervisor ID-POS#: Name:
 Position No. & Title: Department:
 Effective Date: (Enter effective date of Reports-To change)

Note: By submitting this change, all selected employees will report to the new supervisor as indicated above.

Look Up Supervisor ID-POS#

Supervisor/Manager ID:
 Employee ID:
 Last Name: skall
 First Name: erik
 Position Number:
 Effective Date:
 Department:

Basic Lookup

7. Verify the effective date.

New Supervisor Employee ID-RCD-POS #:

Supervisor ID-POS#:

Name: Erik Skall

Position No. & Title: 00012172 Administrator I Department: Grounds Maintenance

Effective Date: (Enter effective date of Reports-To change)

8. Click on **Submit**.

9. Click **OK**.

Message

Update Reporting Relationship (31700,13)

You have begun the process to change the supervisor-subordinate reporting relationship. If you hit this button in error, please press the "Cancel" button. If you did not hit the button in error and are ready to begin the submission process, please press the "OK" button.

10. Be patient while CMS is processing. 😊 It may take a minute or two...



11. You will know CMS is finished processing when you see the message below.

12. Click **Refresh** and you are done.

Direct Reports For Paul Serafimidis

Name	Employee ID	Rcd#	Job Title	Department	Notes
<input type="checkbox"/> Bair, Timothy	102097242	0	ADMIN 2	Engr Svcs	
<input checked="" type="checkbox"/> Boehl, Glen	217391340	0	LD GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Carpenter, David	218651197	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Castanon, Michael	217315580	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Davis, Johnathan	212409223	0	GARDEN SPC	Grounds Ma	
<input checked="" type="checkbox"/> Gallegos, Rudy	11356360	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Gutierrez, Jesus	21721700	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Knorr, Dale	101757221	0	ED/BUS DRV	Grounds Ma	
<input checked="" type="checkbox"/> Marquez, Juan	220234900	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Ochoa-Alvaro, Jaime	223004500	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Perrin, Matthew	102098582	0	AUTO EDOOP	Fac Mgmt-P	
<input checked="" type="checkbox"/> Plumley, Joseph	223003040	0	GARDEN SPC	Grounds Ma	
<input checked="" type="checkbox"/> Raya, Alejandro	211406577	0	GRDAK	Fac Mgmt-P	
<input checked="" type="checkbox"/> Reclusado, Dominador	102050378	0	GARDEN SPC	Grounds Ma	
<input checked="" type="checkbox"/> Rich, Larry	101023426	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Sanchez, Luis	219991903	0	GRDAK	Grounds Ma	
<input type="checkbox"/> Skall, Erik	102090427	0	ADMIN 1	Grounds Ma	
<input checked="" type="checkbox"/> Soto, Jose	214252286	0	GRDAK	Grounds Ma	
<input checked="" type="checkbox"/> Teves, Chardik	218951200	0	GRDAK	Fac Mgmt-P	
<input type="checkbox"/> Todd, Ryan	201849082	0	ADMIN 2	Campus Con	

*** Selected employee(s) above have been updated successfully. Please click the **Refresh** button to verify. ***

New Supervisor Employee ID-RCD-POS #:

Supervisor ID-POS#: 00012172

Name: Erik Skall

Position No. & Title: 00012172 Administrator I Department: Grounds Maintenance

Effective Date: (Enter effective date of Reports-To change)