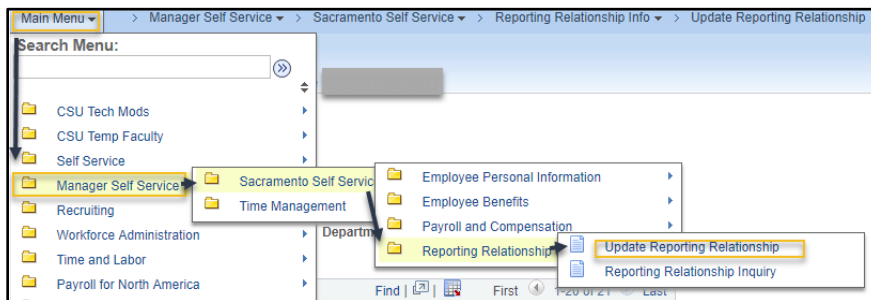


Update Reporting Relationships through the Manager Self Service CMS HR portal

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', along with a 'Refresh' button. Below this is a table titled 'Direct Reports For %1' with columns for Name, Employee ID, Rcd#, Job Title, Department, and Notes. The table currently shows 0 records. The bottom section is for the 'New Supervisor' and includes fields for 'Supervisor ID-POS#', 'Name', 'Department', and 'Effective Date' (with a date picker set to 10/01/2019), along with 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. The title is 'Look Up Supervisor ID-POS# (Usually easiest to search by name or position number)'. It features several search criteria fields, each with a 'begins with' dropdown menu: 'Supervisor/Manager ID', 'Employee ID', 'Last Name', 'First Name', 'Position Number', and 'Department'. There is also an 'Effective Date' field with a dropdown menu set to '=' and a date picker. At the bottom, there are 'Look Up', 'Clear', and 'Cancel' buttons, and a 'Basic Lookup' link. Below the form, 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#: 101057368-0-00008934 Name: Paul Serafidis
 Position No. & Title: 00008934 Fac Svcs Administrator III Department: Facilities Management

Direct Reports For Paul Serafidis

Name	Employee ID	Rcd#	Job Title	Department	Notes
<input type="checkbox"/> Bair, Timothy	150007542	9	ADMIN 2	Comp Svcs	
<input checked="" type="checkbox"/> Boehl, Glen	217351346	9	LD GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Carpenter, David	218851987	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Castanon, Michael	217315006	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Davis, Johnathan	212488223	9	GARDEN SPC	Grounds Ma	
<input checked="" type="checkbox"/> Gallegos, Rudy	218358300	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Gutierrez, Jesus	218471700	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Knorr, Dale	010400321	9	ECORUS DRV	Grounds Ma	
<input checked="" type="checkbox"/> Marquez, Juan	220205432	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Ochoa-Alvaro, Jaime	223054000	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Perrin, Matthew	192864862	9	AUTO ECDOP	Fac Mgmt-P	
<input checked="" type="checkbox"/> Plumley, Joseph	223051840	9	GARDEN SPC	Grounds Ma	
<input checked="" type="checkbox"/> Raya, Alejandro	211400677	9	GRDWRK	Fac Mgmt-P	
<input checked="" type="checkbox"/> Reclusado, Dominador	02888878	9	WFO SPC	Grounds Ma	
<input checked="" type="checkbox"/> Rich, Larry	011523425	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Sanchez, Luis	218891803	9	GRDWRK	Grounds Ma	
<input type="checkbox"/> Skall, Erik	02888427	9	ADMIN 1	Grounds Ma	
<input checked="" type="checkbox"/> Soto, Jose	214252380	9	GRDWRK	Grounds Ma	
<input checked="" type="checkbox"/> Teves, Chardik	218851200	9	GRDWRK	Fac Mgmt-P	
<input type="checkbox"/> Todd, Ryan	218480882	9	ADMIN 2	Calculus Con	

- 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: 10/01/2019 (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: begins with

Employee ID: begins with

Last Name: begins with skall

First Name: begins with erik

Position Number: begins with

Effective Date: =

Department: begins with

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"/> Blair, Timothy	102087243	0	ADMIN 2	Engr Svcs	
<input checked="" type="checkbox"/> Boehl, Glen	217381340	0	LD GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Carpenter, David	218651187	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Castanon, Michael	217315580	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Davis, Johnathan	212408223	0	GARDEN SPC	Grounds Ma	
<input checked="" type="checkbox"/> Gallegos, Rudy	218356360	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Gutierrez, Jesus	218471700	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Knorr, Dale	101091121	0	EQ/BUS DRV	Grounds Ma	
<input checked="" type="checkbox"/> Marquez, Juan	220233900	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Ochoa-Alvaro, Jaime	223004600	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Perrin, Matthew	102084682	0	AUTO EQOP	Fac Mgmt-P	
<input checked="" type="checkbox"/> Plumley, Joseph	223003040	0	GARDEN SPC	Grounds Ma	
<input checked="" type="checkbox"/> Raya, Alejandro	211406677	0	GRDWK	Fac Mgmt-P	
<input checked="" type="checkbox"/> Reclusado, Dominador	102065078	0	REG SPC	Grounds Ma	
<input checked="" type="checkbox"/> Rich, Larry	101023425	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Sanchez, Luis	219891803	0	GRDWK	Grounds Ma	
<input type="checkbox"/> Skall, Erik	102089427	0	ADMIN 1	Grounds Ma	
<input checked="" type="checkbox"/> Soto, Jose	214252286	0	GRDWK	Grounds Ma	
<input checked="" type="checkbox"/> Teves, Chardik	218851200	0	GRDWK	Fac Mgmt-P	
<input type="checkbox"/> Todd, Ryan	210480882	0	ADMIN 2	Campus Con	

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

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)