University of Connecticut

Supervisor ID Change Job Aid

Overview Department Processors are responsible for initiating a Supervisor ID change. Once the Smart HR *Supervisor ID Change* template is complete, the template is routed directly to the Job Data pages.

There are **five** Smart HR *Supervisor ID Change* templates in Core-CT, one for each employee group. Each template is identical. The five are as follows:

- UC_DC_SUP_ID_STU: Supervisor ID Change – Student
- UC_DC_SUP_ID_GRD: Supervisor ID Change – Graduate
- UC_DC_SUP_ID_CLS: Supervisor ID Change – Classified
- UC_DC_SUP_ID_UNCL: Supervisor ID Change – Unclassified
- UC_DC_SUP_ID_SPEC: Supervisor ID Change – Special Payroll

In Core-CT, the Supervisor ID identifies the **"true"** supervisor of an employee. This supervisor is responsible for and accountable for an employee's performance and duties, and for approving an employee's time where applicable. It is **extremely** important that the Supervisor ID is kept up-to-date for all employees.
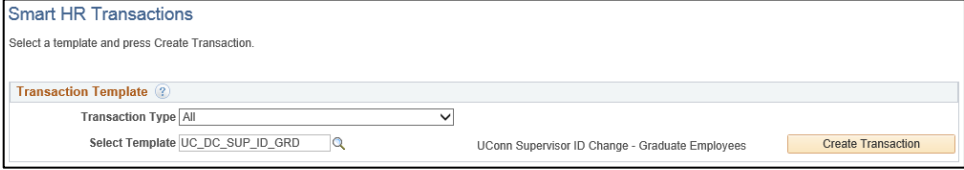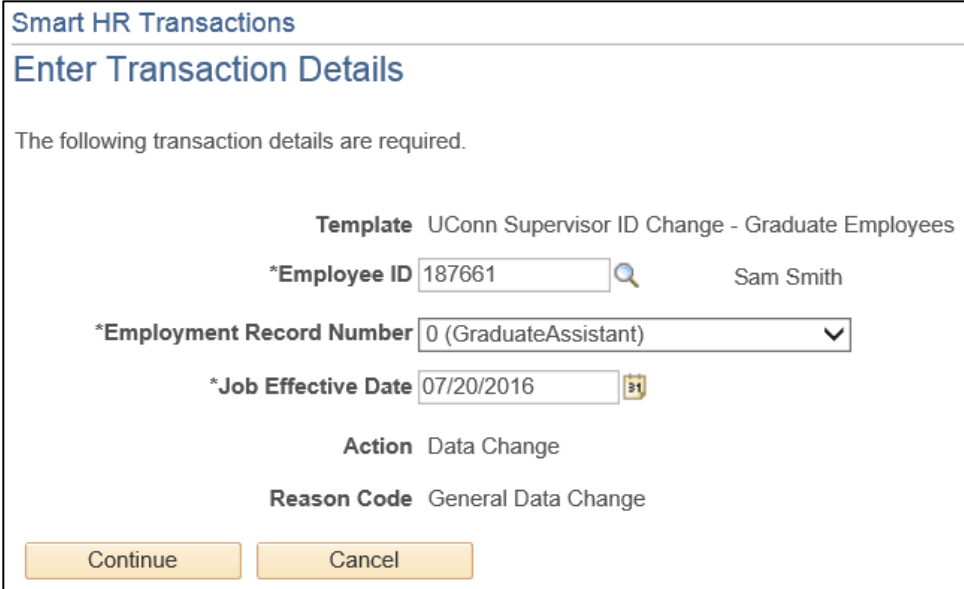
Note: Supervisors can designate authorized/proxy approvers as well.

In Core-CT, supervisors of any type of employee-can also view data online, such as their direct and indirect reports, time utilization, demographics, etc.

Department Processors should have an offline conversation with the current and new supervisors to ensure they are aware of the employee's supervisor change.

Use this job aid to process a Supervisor ID change for an employee in Core-CT. This example uses the *Graduate Supervisor ID Change* template.

Process Steps

Step	Action	Screenshot
1	Navigation: **Main Menu > Core-CT HRMS > Workforce Administration > Smart HR Template > Smart HR Transactions**	
2	From the **Smart HR Transactions** page, enter the following: • **Transaction Type:** All • **Select Template:** UC_DC_SUP_ID_GRD Click **Create Transaction.**	Smart HR Transactions Select a template and press Create Transaction. Transaction Template ? Transaction Type All Select Template UC_DC_SUP_ID_GRD UConn Supervisor ID Change - Graduate Employees Create Transaction
3	On the **Enter Transaction Details,** enter the following: • **Employee ID**: Enter the employee ID for the employee whose supervisor is changing. If unknown, click the **magnifying glass** to search for the employee. • **Employment Record Number:** This will auto-populate with the most recent employment number. If the employee has more than one Active employment record, select the one the employee is changing supervisors for. • **Job Effective Date**: Enter the date the supervisor ID change is effective. This will auto-populate to today's date. Then, click **Continue**.	Smart HR Transactions **Enter Transaction Details** The following transaction details are required. Template UConn Supervisor ID Change - Graduate Employees *Employee ID 187661 Sam Smith *Employment Record Number 0 (GraduateAssistant) *Job Effective Date 07/20/2016 Action Data Change Reason Code General Data Change Continue Cancel

Step	Action	Screenshot
4	On the **Enter Transaction Information** page, the **Department** and **Job Code** will be pre-populated and read-only. Update the **Supervisor ID** to the employee's new supervisor. Add additional information regarding the supervisor change in the **Comments** section if your department's business process requires it.	**Smart HR Transactions** **Enter Transaction Information** Enter the following Employee or Contingent Worker information. Return to Enter Transaction Details Page [Save for Later] [Cancel] **Supervisor ID Change** **Work Location - Job Fields** Department UOC67000 **Job Information - Job Code** Job Code 4185VR **Job Information - Reporting Information** Supervisor ID 100003 **Comments** Comments: Sam Smith's new supervisor is Jane Johnson, effective 07/20/2016. Return to Enter Transaction Details Page [Save for Later] [Cancel] [Save and Calculate]
5	If the **Supervisor ID** is unknown, click the **magnifying glass** next to the field to search for the supervisor. In this example, the user searched by **Department** to find the correct Supervisor. Click on the new supervisor to add to the template.	**Look Up Supervisor ID** Search by: Department ▼ begins with UOC01325 [Look Up] [Cancel] Advanced Lookup **Search Results** View 100 First 1-57 of 57 | Department	Person ID	Empl Record	Name	Last Name	Second Last Name	First Name	Alternate Character Name	Organizational Relationship	Business Unit
---	---	---	---	---	---	---	---	---	---
UOC01325	011321	0	Lisa Powell	POWELL	(blank)	LISA	(blank)	Emp	UNIVS
UOC01325	042598	1	Liam Martin	MARTIN	(blank)	LIAM	(blank)	Emp	UNIVS
UOC01325	044166	1	Sue Chapman	CHAPMAN	(blank)	SUE	(blank)	Emp	UNIVS
UOC01325	055044	0	Natalie Skinner	SKINNER	(blank)	NATALIE	(blank)	Emp	UNIVS
UOC01325	059863	0	Carolyn Lawrence	LAWRENCE	(blank)	CAROLYN	(blank)	Emp	UNIVS
UOC01325	068244	0	Emily Poole	POOLE	(blank)	EMILY	(blank)	Emp	UNIVS	
6	Back on the Supervisor ID change template, click **Save and Calculate**. Once saved, the **Attachments** section will open at the bottom of the template. If applicable, search for and attach an attachment to include with the supervisor change.	**Attachment** Find	View All	First 1 of 1 Last 	*Description	Attached File	Attach	Open	Delete
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1 Sam_Smith_-_Supervisor_Change	Sam_Smith_-_Supervisor_Change.doc	[Attach]	[Open]	[Delete]	

Step	Action	Screenshot
7	When all information on the template is complete, click **Save and Submit.** This will route the Supervisor ID change template to the Department Approver for approval.	Smart HR Transactions **Enter Transaction Information** Enter the following Employee or Contingent Worker information. Return to Enter Transaction Details Page [Save and Submit] [Cancel] **Supervisor ID Change** **Work Location - Job Fields** Department UOC67000 **Job Information - Job Code** Job Code 4185VR **Job Information - Reporting Information** Supervisor ID 100003 **Comments** Comments Sam Smith's new supervisor is Jane Johnson, effective 07/20/2016. Return to Enter Transaction Details Page [Save and Submit] [Cancel] [Save and Calculate] **Attachment** Find | View All | First 1 of 1 Last *Description Attached File Attach Open Delete 1 Sam_Smith_-_Supervisor_Change Sam_Smith_-_Supervisor_Change.doc [Attach] [Open] [Delete] [+]