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.
UConn/Core CT Job Aid: Supervisor ID Change  
Version 1.0

**Process Steps**

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Navigation: Main Menu &gt; Core-CT HRMS &gt; Workforce Administration &gt; Smart HR Template &gt; Smart HR Transactions</td>
<td><img src="image" alt="Screenshot of Smart HR Transactions" /></td>
</tr>
</tbody>
</table>
| 2    | From the Smart HR Transactions page, enter the following:  
- Transaction Type: All  
- Select Template: UC_DC_SUP_ID_GRD  
Click Create Transaction. | ![Screenshot of Enter Transaction Details](image) |
| 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. | ![Screenshot of Select Template and Enter Details](image) |
<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Screenshot</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>On the <strong>Enter Transaction Information</strong> page, the <strong>Department</strong> and <strong>Job Code</strong> will be pre-populated and read-only. Update the <strong>Supervisor ID</strong> to the employee’s new supervisor. Add additional information regarding the supervisor change in the <strong>Comments</strong> section if your department’s business process requires it.</td>
<td><img src="image1.png" alt="Screenshot of the Enter Transaction Information page" /></td>
</tr>
<tr>
<td>5</td>
<td>If the <strong>Supervisor ID</strong> is unknown, click the <strong>magnifying glass</strong> next to the field to search for the supervisor. In this example, the user searched by <strong>Department</strong> to find the correct Supervisor. Click on the new supervisor to add to the template.</td>
<td><img src="image2.png" alt="Screenshot of the Look Up Supervisor ID page" /></td>
</tr>
<tr>
<td>6</td>
<td>Back on the Supervisor ID change template, click <strong>Save and Calculate</strong>. Once saved, the <strong>Attachments</strong> section will open at the bottom of the template. If applicable, search for and attach an attachment to include with the supervisor change.</td>
<td><img src="image3.png" alt="Screenshot of the Attachment section" /></td>
</tr>
</tbody>
</table>
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.