



HRIS Job Role Training

Supervisor Code Training

Forms: HR07

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Introduction

In the HRIS system, codes are required to identify supervisor/subordinate reporting relationships. These are used to set up Manager and Employee Self Service and workflow. The codes outline the employee information that is accessible by a supervisor within Manager Self Service. In addition, these codes determine the routing process for actions that need to flow through the supervisor in order to complete a review/approval process.

Two codes are used in HRIS to accomplish this:

- **Link to Supervisor** – identifies those positions with supervisory responsibilities such as approval authority (i.e., review and sign-off) on personnel actions, time and attendance, and personnel evaluations. Only positions that have other positions reporting to them should have a Link to Supervisor code.
- **Direct Supervisor** – identifies which position a position reports to. Every position requires a Direct Supervisor code. The Direct Supervisor code identifies the position (employee) that the defined position reports to.

It is mandatory that all positions have a valid Direct Supervisor code, although not every position will have a Link to Supervisor code. Only positions that are supervisory positions will use the Link to Supervisor field. Essentially everyone has a supervisor but not everyone is a supervisor.

Supervisor codes must follow a pre-defined format to be appropriately setup in HRIS. The format is as follows:

XXXXXYZZZ

XXXXX represents the five character agency process level.

YY represents the two digit management level. The management level designations are:

01	Governor
10	Director
20	Deputy Director
30	Assistant / Division Director
40	Program Administrator
50	Assistant Program Administrator
60	Manager II
70	Manager I
80	Supervisor II
90	Supervisor I

ZZZ represents a three character field that is unique. The field may consist of letters, numbers or a combination.

Example: John Smith is the director at ADOT in process level DT123. His executive staff assistant is Julie Singer, who has no one reporting to her. John reports to the Governor, which makes his Direct Supervisor code GV10001001, and he has employees who report directly to him. His Link to Supervisor code is DT12310001. Julie has a Direct Supervisor code of DT12310001 and no Link to Supervisor code.

Employee	Direct Supervisor	Link to Supervisor
Governor	GV10001001	GV10001001
Smith, J	GV10001001	DT12310001
Singer, J	DT12310001	

Agency HR Initiators will use the *Supervisor (HR07.1)* form to create, update or inactivate a supervisor code. In addition, this form can be used to assign an employee to a supervisor code by placing the employee's EIN in the Employee field. This signifies the employee is a supervisor. **Each supervisor code must be unique and follow the above stated format.**

Once the supervisor code has been created, assign the code to the positions. Every position that reports to this supervisor must be updated with the correct Direct Supervisor via the ZP02 for System A agencies or XP02 for Non-System A agencies. Please see the Position Training available in the Agency HR Initiator Job Role.

The actions on the XP52.1 / XP52.4 are designed to add and remove the EINs in and out of the code depending on the position and action. Manual entry of the EIN is necessary if the position the employee is currently in becomes a supervisory position. In other words, if the supervisor code is already on the position and an employee is hired into that position, the employee's EIN will be added automatically to the supervisor code on the HR07. If the employee is already in the position and the position is changed to a supervisory position, you will have to go to the HR07 and manually enter the employee's EIN.

It is extremely important that the supervisor codes are kept up-to-date and accurate. Therefore, if an employee who is assigned to a supervisor code changes to another position, you must verify that the *Supervisor (HR07.1)* form displays an applicable supervisor for that code.

Agencies can also change supervisor assignments by contacting the Agency Supervisor Code Maintenance Specialist who will make the updates using the *Position Supervisor Code Maintenance (ZP04.1)* form.

Supervisor Form (HR07.1)

Adding a Supervisor Code

The screenshot shows the HRIS Supervisor Form (HR07.1) interface. The top navigation bar includes the HRIS State of Arizona logo (11), the form title "Supervisor (HR07.1)", and a search bar containing "hr07" (1). The search bar also features a magnifying glass icon, a refresh icon, and a help icon (4). Below the search bar is a toolbar with buttons for "Add", "Change", "Delete", "Previous", "Inquire", "Next", and another "Inquire" dropdown (1). A "Related Forms" dropdown is located on the right side of the toolbar. On the left, there is a blue sidebar with "Home" and "Inbasket" options. The main form area contains several input fields: "Company" (2), "Supervisor" (3), "Effective" (6), "Status" (7) with a dropdown menu showing "A" and the text "Active", "Employee" (7), and "Reports to" (8). Below these are five "User Field" inputs (9), labeled "User Field 1" through "User Field 5", which are grouped by a blue bracket (10). A long, empty text input field (5) is positioned to the right of the "Supervisor" field. The bottom of the screen shows a Windows taskbar with "Done", "Internet", and "100%" zoom level.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	Type HR07.1 in the white search box. Press <i>Enter</i> on the keyboard.	The Supervisor (HR07.1) form opens.	
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Supervisor field – Box 1	R	Type a code to represent a supervisor's position.	System will display the entered code.	10 character alphanumeric code consisting of: <ul style="list-style-type: none"> • The five character agency process level, followed by • The 2 digit management level, followed by • A unique 3 character field assigned by the agency <p>Example: DT12310456</p>
4	Inquire button	R	Click Inquire to see if the supervisor code already exists.	If the code does not exist, see message "Supervisor does not exist" in the lower left corner. If the code does exist, see message "Inquiry Complete" in the lower left corner.	If the code does exist, then you cannot add the code using the information in the Supervisor field – Box 1. Either a new code needs to be created, or you need to update the existing code by following the steps outlined in the section: Changing a Supervisor Code (Page 8). If the code does not exist, continue with the steps below.
5	Supervisor field – Box 2	R	Type in the description for the supervisor code.	System will display the entered description.	To the extent possible, use of specific position or class titles for the description field should be avoided in order to lessen the need for updating if position or class title changes occur. Example: ADOA HR Proc Unit Supv would be appropriate

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
6	Effective field	R	Type the effective date of the code.		Date is formatted as MMDDYYYY. This is the date the information will be logged to history. If you leave this date blank, the current date will be logged to history.
7	Status field	R	Type or select from the drop down menu the status for this supervisor code.		Valid values are: A – Active I – Inactive Default is 'A'.
8	Employee field	R	Type or select from the drop down menu the EIN of the employee who holds this supervisory position.	Once you tab to the next field the employee's name will appear to the right of the field.	
9	Reports To field	R	Type or select from the drop down menu the supervisor code that represents this supervisor's supervisor.	Once you tab to the next field the employee's name will appear to the right of the field.	This information does not appear on the Employee (HR11.1) form, but can be used for hierarchical structure reporting relationships.
10	User Field 1 thru Field 5	O	Leave blank. These fields are not being used at this time.		
11	Add button	R	Click 'Add' to save your changes.	See message 'Add Complete – Continue' in the lower left corner.	

Changing a Supervisor Code

The screenshot shows the HRIS State of Arizona interface for editing a Supervisor record (HR07.1). The page includes a navigation bar with buttons for Add, Change, Delete, Previous, Inquire, and Next. A search bar at the top right contains the value 'hr07'. The main form area contains several fields: Company, Supervisor, Effective, Status (set to 'A'), Employee, and Reports to. Below these are five User Fields. Callouts 1 through 11 point to specific elements: 1 points to the search bar, 2 to the Company field, 3 to the Supervisor field, 4 to the Inquire button, 5 to the Supervisor field's value area, 6 to the Effective field, 7 to the Status dropdown, 8 to the Employee field, 9 to the Reports to field, 10 to the User Fields section, and 11 to the Change button. The status 'Active' is displayed next to the Status field. The bottom of the screen shows a Windows taskbar with 'Done', 'Internet', and '100%' zoom level.

	HRIS Field	R / O	Step/Action	Expected Results	 Notes/ Additional Information
1	White Search Box	R	Type HR07.1 in the white search box. Press <i>Enter</i> on the keyboard.	The Supervisor (HR07.1) form opens.	
2	Company field	R	Type 1 in Company field.	System will access information for Company 1.	All forms/actions must contain a 1 in the Company Field.
3	Supervisor field – Box 1	R	Type in the code that represents the supervisor code being changed.	System will display all the current information for the entered code.	10 character alphanumeric code consisting of: <ul style="list-style-type: none"> • The five character agency process level, followed by • The 2 digit management level, followed by • A unique 3 character field assigned by the agency <p>Example: DT12310456</p>
4	Inquire button	R	Click Inquire to see if the supervisor code exists.	If the code does not exist, see message “Supervisor does not exist” in the lower left corner. If the code does exist, see message “Inquiry Complete” in the lower left corner.	If the code does not exist, then you cannot change the code using these steps. You must follow the steps outlined in the section: Adding a Supervisor Code (Page 5) to create this code. If the code does exist, continue with the steps below.
5	Supervisor field – Box 2	R	If applicable, type in the NEW description for the supervisor code.	System will display the entered description.	To the extent possible, use of specific position or class titles for the description field should be avoided in order to lessen the need for updating if position or class title changes occur. Example: ADOA HR Proc Unit Supv would be appropriate

	HRIS Field	R / O	Step/Action	Expected Results	Notes/ Additional Information
6	Effective field	R	If applicable, type in the NEW effective date of the code.		Date is formatted as MMDDYYYY. This is the date the information will be logged to history. If you leave this date blank, the current date will be logged to history.
7	Status field	R	If applicable, type in the NEW status for this supervisor code.		Valid values are: A – Active I – Inactive Default is 'A'.
8	Employee field	R	If applicable, type in the NEW EIN of the employee who holds this supervisory position.	Once you tab to the next field the employee's name will appear to the right of the field.	
9	Reports To field	R	If applicable, type in the NEW supervisor code that represents this supervisor's supervisor.	Once you tab to the next field the employee's name will appear to the right of the field.	This information does not appear on the Employee (HR11.1) form, but can be used for hierarchical structure reporting relationships.
10	User Field 1 thru Field 5	O	Leave blank. These fields are not being used at this time.		
11	Change button	R	Click 'Change' to save your changes.	See message 'Change Complete – Continue' in the lower left corner.	Remember to update the position. For help with position training, go to the Agency HR Initiator job role training.