1. Log into the Staff Performance Management system.

2. NOTE: Only Organization (ORGN) Managers can review and set Supervisor/Employee Relationships.

3. Click the Supervisors and Staff Employee Relationship link.
4. A list of the current employee/supervisor relationships will display with a search area for adding entries above the list. The employees and their associated supervisors display based on Banner data as well as manual entries that you have made.

Banner data refreshes the automated employee/supervisor relationships nightly, while manually entered relationships will expire in 14 days.

   a. Click a column heading to sort by that column.
   b. Select a page size from the Page Size drop-down box to set how many employee/supervisor relationships to see on one page.
   c. Use the Filter box to search by Supervisor or Employee Name or Title.

5. OPTIONAL: Scroll and page through the list to identify any relationships that should be deleted. Click Delete to remove the relationship.
6. To set a new relationship, you will need to add a manual entry: Scroll to the top of the page as needed and click on Search under Selected Supervisor to query the correct supervisor.

<table>
<thead>
<tr>
<th>Org Managers, below is a listing of the employees currently assigned to your organization and the supervisor assigned to them. Please review and make adjustments as necessary. This is necessary to ensure proper completion of the performance management process in the online system.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selected Supervisor</strong></td>
</tr>
<tr>
<td>Search</td>
</tr>
<tr>
<td>Select Employee</td>
</tr>
<tr>
<td>Search</td>
</tr>
<tr>
<td>Add Entry</td>
</tr>
<tr>
<td>Existing Entries</td>
</tr>
</tbody>
</table>

7. A Person Search box will pop up. Enter the First and Last Name of the supervisor and click Search.
8. Search results will display based on your entry. When the correct person displays, click *Select*.

![Person Search](image)

9. Verify that the person you selected now displays under *Selected Supervisor*. Click *Search* under *Select Employee*.

![Selected Supervisor](image)

10. A Person Search box will pop up. Enter the First and Last Name of the employee and click *Search*.

![Person Search](image)
11. Search results will display based on your entry. When the correct person displays, click Select.

12. Verify that the person you selected is listed under Selected Subordinate. Note: multiple employees can be selected for the same supervisor.
   a. Verify that the supervisor and subordinate(s) are correctly listed.
   b. Then, click Add Entry.

13. Look to the top of the page to confirm that the entry was added.
14. If you have set this as a *temporary relationship* for the purpose of allowing someone to create or edit a PD on behalf of the supervisor, skip to step 17.

15. If you have set this as a *permanent relationship*, click **HSC Records** to email your request to update the Banner database with the entry.

16. You may receive a browser security warning; if you recognize this action, click **Allow**.
If your Outlook is configured appropriately, an Outlook email window will open with prepopulated subject and text specifying the relationship. Add additional text as needed and click Send to email the request to HSC HR Records.

17. Verify that the relationship you added appears as an existing entry, which may require refreshing your browser window.

Manual relationship entries will expire in 14 days. The Staff Performance Management system will refresh its automated entries from Banner data nightly.