A supervisory organization represents the structure of *who reports to whom*

Creating a Supervisory Organization

Questions for review prior to creating a new supervisory organization:

1. Will the new manager be taking over an existing position that already exists and is a supervisory organization? If yes, a new supervisory organization is not needed.
2. Will the new manager be going into a new position and have a brand new team? If yes, create a new supervisory organization.

**Creation Steps (pages 1-4) [see pages 5-6 for steps on how to Edit or Inactivate a SUPV ORG.]

Create a new subordinate supervisory organization under the primary supervisory org by selecting related actions > Reorganization > **Create Subordinate** or **Divide Organization** as a related action off of the existing organization.

![Create Subordinate](image)

On this very screen, off the Reorganization > Create Subordinate > make the Effective Date 01/01/1900
Fill in the following fields:
- Availability date = 1/1/1900
- Organization Name = this could be a service line, cost center name etc. Consult with the requestor to determine the best name for the sup org based on what the manager is overseeing.
- Include Manager/Leader in Name = mark as checked
- Organization Subtype = Supervisory Organization
- Primary Location = select the location where the manager is located or if you know who the direct reports will be, the location of the majority of those direct reports

Submit

You will get an Up Next task but this function will not work. Click Done

Go back to Search and enter the org name you just created...Inherited will be at the end
From the "inherited" sup org, select related Actions > Roles > Assign Roles

On the Assign Roles screen, the Effective Date must be equal to the beginning of the pay period and/or when the manager you are putting into it was hired.

Assign the Role of manager and then enter the manager's name in the Assigned To field.

Click ok/done/submit once finished; the new org will be created.
Go back to your inbox, delete the transaction and then submit

The Final step to the "create new supervisory org", would be to Edit Supervisory Organization and fill in the Code field to match the Organization ID which was assigned. In the example below, you would fill in SUP_985.
Edit Supervisory Org steps

To Edit a created Sup Org, go to the related actions > Supervisory Organization > Edit Supervisory Organization

Typically you will ONLY be editing the name. Put a + after the name if there are more than 1 cost center in the sup org.

The Effective Date should be kept as 1/1/1900; if possible.
Inactivate Supervisory Org steps
If you move all workers out of a Supervisory Org and there is no need for that Supervisory Org to remain it should be inactivated. Prior to doing this step, it is imperative that you move any open positions, to an active Supervisory Org.

To Inactivate a Sup Org, go to the Sup Org in question related actions > Reorganization > Inactivate Organization