

How UGA Financial Management System uses Reports-To:

You may be asking, “Why did this travel item route to this person?” The answer is: “It’s complex” and here are a few things worth mentioning:

1. There are a few ways that “Reports-To” in the Financial Management System is set:
 - a. Which does “Alternate Approver” set in Financials by request from the original approver/supervisor.
 - b. By the UGAJobs supervisor data for faculty and benefits eligible staff. Note: if you see that Financials does not match UGAJobs for Reports-To, see #2 and #3 for a remedy.
 - c. By a “Replacement Department Head” established by Project Coordinators for each unit if the default Department Head (item d below) is not the desired individual.
 - d. By Department Head from Legacy “Home” department. This is calculated based on the funding department, not the primary department. This is needed for student workers, graduate assistants, and temporaries but also serves for other employees with inactive UGAJobs supervisor data due to retirements, transfers, etc.

2. As identified earlier this week, there may be instances when the data in UGAJobs is not flowing over correctly to Financials. If you can identify these issues, please contact hrweb@uga.edu with the specific employee information.

3. If you determine a travel item has been mis-routed, you may do one of the following. Please take into account that travel items are time sensitive and need to continue processing so employees can be approved for travel and reimbursed.
 - a. “Pushback” the item to the originator and work with them and hrweb@uga.edu to have the supervisor data changed in UGAJobs then re-submit, **or**
 - b. Use the “Approve” button to forward the travel item to the Expense Approver/Manager with a comment that the item was routed to you for Reports-To approval and you are forwarding to the funding department for final review and approval.

HR staff are available to meet with you to review your unit’s Reports-To data and other questions regarding UGAJobs. Please contact them at hrweb@uga.edu to schedule an appointment with HR.