PROXY QUICK GUIDE

Setup for Approvers

MONTANA STATE UNIVERSITY BILLINGS

Access & Excellence

Proxy set up at a glance:

- Log into "My Info"
- Click on "Employee Services"
- Click on Timesheet"
- Click on Proxy Set Up link
- Select Name of Proxy
- Click radial button next to Add
- Click Save
- Notify Payroll of Proxy Info

WEB TIME ENTRY – Quick reference guide for Approvers to set up a Proxy.

Approvers – Designating & Setting up a Proxy

What is a Proxy?

1. A proxy is a person, who can act as an Approver for you in your absence, such as when you are on vacation, attending a conference, or are out sick.
2. Supervisors (approvers) may appoint a proxy for time sheet approval. Users with a proxy role in Web Time Entry have the ability to act, and assume all privileges, for another person for time sheet approval.
3. Proxies are designated by each approver. It is the approver's responsibility to identify their proxy.
4. Prior to setting up your Proxy, make sure you notify and discuss these responsibilities with the person you want to act on your behalf and the timeframe.
5. Need help? Contact Financial Services/Payroll 657-2131

Proxy Responsibilities:

1. A proxy assumes your approval power. They are able to view the same information that you are able to view.
2. A proxy remains active until you remove them from your proxy list.
3. You must set up at least one proxy approver to approve timesheets in your absence. However, the proxy should only approve time in your absence.
4. You must inform the proxy of the appropriate pay periods to be approved.
5. You may add or delete a proxy at any time. Financial/Services Payroll must be notified of any proxy changes   FinancialServices@msubillings.edu.
6. The proxy approver must verify all hours worked and ensure that any necessary corrections were made prior to approving time for payroll.
7. It is the responsibility of the proxy approver to let the employee know that a timesheet has been returned for correction either in person or by email.

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To set up your Proxy

1. You must set your own Proxy
2. Go to www.msubillings.edu
3. Click on **My Info** (located in left hand tool bar near bottom)
4. Click on **Enter Secure Area** and type in your User ID and PIN
5. Click on the **Login** button; your name should appear following the word Welcome.
6. Click on the **Employee Services** tab.
7. Click on the **Time Sheet** link on the left side of the window
8. On the Selection Criteria page, click the **Proxy Set Up** link (in the bottom middle of the page).
9. From the **Name** dropdown box, select the person you want designated as your proxy.
10. Click in the box under **Add.**
11. Click the **Save** button.
12. After you designate your Proxy, you will need to email FinancialServices@msubillings.edu with the proxy information.
13. If the name of the person you want to designate as your Proxy does not appear on the drop down list, you will need to contact them and have them request a Banner USER ID for Time Sheet Approval.
14. In order to set up a Banner ID for Time Sheet Approval only, you will need to let them know your time sheet org number.
15. Need help? Contact the Financial Services/Payroll office 657-2131 or email FinancialServices@msubillings.edu

To Request a Banner ID for Time Sheet Approval

1. Email FinancialServices@msubillings.edu
2. In the subject line type in, Proxy Banner ID Request
3. In the body of the message type in:
   a. Proxy Name and Department Name
   b. Proxy Position and Timesheet Org Numbers
4. It will usually take two business days for this process.
5. When the Banner ID has been set up for your Proxy, you can proceed with the set up. Their name should now appear in the Name dropdown box.