

# Proxy Quick Guide Setup for Approvers



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 HR of Proxy Info.
- You are done!

**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. As noted in the University Policy for Delegation of Authority, 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 Human Resources 994-3651.

### 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.  
\*HR must be notified of any proxy changes.
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.

### To Set up Your Proxy:

1. You must set your own Proxy.
2. Go to [www.montana.edu/hr](http://www.montana.edu/hr)
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 Human Resources with the following information (only if the information differs from the initial timesheet org set up sheet):
  - a. In the subject line of your email type in **PROXY DESIGNATION**
  - b. In the body of the message type in:
    - i. Proxy Name
    - ii. Proxy Department name
    - iii. Proxy Position Number
    - iv. Timesheet org number
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 Human Resources 994-3651.

### To Request a Banner ID for Time Sheet Approval (Proxy needs to request their own ID):

1. Go to Banner Services Information & Help website: <https://sais.montana.edu/>
2. Click on **Banner Reports Account Request**.
3. Complete the **Banner Reports Account Request** form per the instructions.
4. Under "Please select one of the following," find **Electronic Time Sheet Approver Only** and change the response to **YES**.
5. Click on the radial button for **Bozeman**
6. In the "**Additional Comments**" section:
  - a. Fill in the space with the time sheet org number given to you by the person for whom you will be a proxy. (You will not be able to proceed without this number).
  - b. Also type in "**Requesting Banner ID for Proxy set up.**"
7. Read and complete the "**Confidentiality and User Responsibility Statement.**"
8. Complete the "**Please provided the following information section.**"
9. Click on the review button and verify all information is correct then click on "**Submit Request.**"
10. It will usually take two business days for this process.
11. 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.