**PROCESS OVERVIEW**

The purpose of this reference guide is to provide instructions for Manager Self Service (MSS) Transactions; including Supervisor ID Change (All students and some staff), Termination, Retirement and Delegation activities. This document is set up according to the various tasks that may be performed when using Manager Self Service (MSS).

1. Begin at the *bgsu.edu* home page
2. Click *MyBGSU*
3. Enter *Username* and *Password*
4. Navigate: Employees > Manager Information > Manager Dashboard
5. Quick Links
6. Choose appropriate transaction

<table>
<thead>
<tr>
<th>Where do I go?</th>
</tr>
</thead>
<tbody>
<tr>
<td>MyBGSU &gt; Employees &gt; Manager Information &gt; Manager Dashboard/Quick Links &gt; Choose appropriate Transaction</td>
</tr>
</tbody>
</table>

**SECTION I
NAVIGATION**

Begin the process at the *bgsu.edu* home page.

*Note: Please use Internet Explorer*

**Step 1: Click MyBGSU**

![MyBGSU Image]

**Step 2: Enter USERNAME and PASSWORD**

*Note: These will be your BGSU network credentials.*

**Step 2a: Click Login**

![Login Image]
Step 3: Click Employees

Step 4: Under Manager Information
   - Click Manager Dashboard
SECTION II
QUICK LINKS

Quick Links enables the manager to quickly access Job actions that can be performed on their employees.

- Supervisor ID Change (all students and some staff)
- Terminate Employee
- Retire Employee
- Manage Delegation
- Student E-Hire

SECTION III
SUPERVISOR ID CHANGE

Managers and Student Supervisors will have the ability to transfer a student employee or possibly a faculty member from one supervisor to another.

Step 1: Click on the Supervisor ID Change hyperlink

Step 2: Click the Request Reporting Change hyperlink

Step 3: All of the Manager’s Direct Reports will show As of the Date you enter.

Step 3a: To refresh the employees based on a different date,
1. Click
2. Select a new date
3. Click Refresh Employees
Step 4: Select the employee to be transferred to a new Supervisor.

Step 5: Click Continue

Step 6: The Request Reporting Change page appears.

Step 7: Select the Reporting Change Date.

Step 8: Enter the New Supervisor name.

Use the 🕵️‍♂️ to perform a name search
**Manager Self Service (MSS) - Transactions**

<table>
<thead>
<tr>
<th><strong>Step 9:</strong> (Optional) Enter Comments if so desired.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 10:</strong> Click <strong>Submit</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Step 11:</strong> The Submit Confirmation page will appear.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Request for Supervisor ID Change was successfully submitted.</td>
</tr>
<tr>
<td>• Pending approvals will show</td>
</tr>
<tr>
<td><strong>Note:</strong> Approvers are only HR or SES. Reviewers are managers with a vested interest in this transaction.</td>
</tr>
<tr>
<td><strong>Step 12:</strong> Click <strong>OK</strong></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th><strong>Step 13:</strong> Request Reporting Change page appears.</th>
</tr>
</thead>
<tbody>
<tr>
<td>• This is a summary page Supervisor ID Change transaction.</td>
</tr>
<tr>
<td><strong>Step 14:</strong> Click <strong>Return to Supervisor ID Change</strong> hyperlink</td>
</tr>
</tbody>
</table>
Step 15: You are returned to the Supervisor ID Change menu.

Step 16: Click

Step 17: You are directed back to the Manager Dashboard.

You have successfully completed the Supervisor ID Change transaction.

SECTION IV
TERMINATE EMPLOYEE

Managers will have the capability to terminate their direct reports.

Note: This is a notification process only. All approvals are done outside of the system, but need to go through the notification process here in PeopleSoft.

Step 1: Click on the Terminate Employee hyperlink

Step 2: Click Terminate Employee hyperlink
Step 3: All of the Manager’s Direct Reports will show As of the Date you enter.

Step 3a: To refresh the employees based on a different date,
4. Click
5. Choose a new date
6. Click

Step 4: Click next to the employee to be terminated.

Step 5: The Terminate Employee page appears.
Step 6: Select the **Termination Date**, this should be the first day they are no longer employed.

Step 7: Choose a **Reason for Termination** from the drop down list.

Step 8: (Optional) Enter in Comments about the employee’s termination if desired.
Step 9: Click **Submit**

![Terminate Employee Form](image1)

Step 10: A Submit Confirmation along with The Terminate Employee Approval will appear.

The notification process is now in progress.

- The termination notification will be sent to the requestor, the budget administrators for the department as well as the immediate supervisor and up the reporting chain stopping at the cabinet level.
- Approvers will be HR for staff and Student Employment Services for students
Step 11: Click on the [Return to Terminate Employee] hyperlink

You have successfully entered an employee’s termination transaction.

Step 12: You will be directed back to the Terminate Employee menu.

Step 13: Click [Manager Dashboard]

Self-Service dashboard for managers
**Step 14:** You will be returned to the Manager Dashboard

---

**SECTION V RETIRE EMPLOYEE**

Managers will have the capability to retire their direct reports.

*Note: This is a notification process only. All approvals are done outside of the system, but need to go through the notification process here in PeopleSoft.*

**Step 1:** Click **Retire Employee**

**Step 2:** Click **Retire Employee** hyperlink
Step 3: All of the Manager’s Direct Reports will show As of the Date you enter.

Step 3a: To refresh the employees based on a different date,
1. Click
2. Choose a new date
3. Click Refresh Employees

Step 4: Click Select next to the employee to be retired.

Step 5: The Retire Employee page appears.
Step 6: Select the **Retirement Date**, this should be first of the month following the retirement.

Step 7: Select a **Reason for Retirement** from the drop down.

Step 8: Click **Submit**
Step 9: **Submit Confirmation** along with **The Retire Employee Approval** will appear.

The *notification process* is now in progress.

- The retirement notification will be sent to the requestor, the budget administrators for the department as well as the immediate supervisor and up the reporting chain stopping at the cabinet level.
- Approvers will be HR
Step 11: Click on the **Return to Retire Employee** hyperlink.

You have successfully entered an employee's retirement transaction.

Step 12: You will be directed back to the **Retire Employee** menu.

Step 13: Click **Manager Dashboard**

Self-Service dashboard for managers.
Step 14: You will be returned to the Manager Dashboard.

SECTION VI
MANAGE DELEGATION

Quick Links allows the option to delegate self-service transactions while you are out of the office.

Step 1: Click Manage Delegation.

Step 2: The Manage Delegation page appears.

Step 3: Click Create Delegation Request.

Manage Delegation

Freddie Falcon

Some of your self-service transactions can be delegated so that others may act on your behalf to initiate and/or approve transactions for you and/or your employees. In addition, others may have delegated responsibility for their transactions to you.

Learn More about Delegation

Create Delegation Request

Selected Create Delegation Request to choose transactions to delegate and provide the proxy to act on your behalf.

Review My Proxies to review the list of transactions that you have delegated and the proxy for each transaction.
Step 4: You are directed to the Create Delegation Request page.

Step 5: Enter the Delegation Dates
- Enter the date you wish the delegation to start. (From Date)
- Enter the date the delegation period will end. (To Date)

Step 5: Click Next
Step 6: Choose the self-service transaction you want to delegate.

- Place a ☑️ in the box next to the transaction the delegate is allowed to perform.

Step 7: Click Next
Step 8: Choose the employee that will be the Delegate.

Step 9: Click Next

Step 10: The Delegation Detail page will appear. The summary page lists:
- Proxy – the Delegate
- Start Date of Delegation
- End Date of Delegation
- Transaction listing of what the Proxy will be able to perform.

Step 11: Click Submit
### Step 12: The Create Delegation Request page appears.

**Create Delegation Request**

Freddie Falcon  
Director  

You have successfully submitted a delegation request. Refer to the My Proxies page to view the status of the request.

### Step 13: Click **OK**

### Step 14: You will be directed back to the Manage Delegation page.

**You have successfully created a Delegate.**

### SECTION VII MANAGER LEAVE ACCRUALS

Managers have the capability to review their direct reports Leave Accrual balances.

- The Quick Link directs you to balances as of the last confirmed payroll.
- You may also view up to date leave balances for your direct reports through time and labor.

### Quick Links

- Supervisor ID Change
- Terminate Employee
- Retire Employee
- Manage Delegation
- Manager Leave Accruals
- Student E-Hire
Step 1: Click
Manager Leave Accruals

Step 2: Enter the Search criteria
(e.g. Partridge/Last Name)

Step 3: Click

Step 4: Current Balances appear
Review Sick, Vacation and Personal balances
Step 5: Click the Monthly Leave Accrual Tab

Step 6: Review Leave Balances for the Month, Hours Earned, Hours Taken and Hours Adjusted

- Click to move to the next Plan Type

Step 7: Click the Leave Accrual tab

Step 8: Review Monthly Accrual Date, Service Hours, Hours Earned, Hours Taken and Hours Adjusted

- Click to move to the next Plan Type

Step 9: Click Back to Direct Reports

You will be returned to the direct reports leave balances page.