Manager Self Service (MSS)
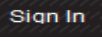
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Through Manager Self Service, managers can access information regarding their team (both direct and indirect employees) and perform additional routine tasks online.

Manager Self Service (MSS) can be accessed by going to MyCWU, then click Sign In and enter your username and password to access your MyCWU Dashboard.

Features

Some features that supervisors can access regarding their team members include:
• Viewing Personal Information
• Hiring Employees
• Requesting and/or Approving Transfers
• Viewing Training Summary and Requesting Training

Workflow

Employees have the ability to administer a wide range of functions via their Self Service. In partnership with these new capabilities, Supervisors can view and approve many day to day activities.

Many requests entered by a team member will require the supervisor's electronic approval. *Supervisors* are notified of a transaction activity requiring action via an automated email generated when the initial request is made. *Appointing Authorities* and *Grants* may also view a transaction activity requiring action as a worklist item generated when the initial request is made.

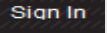### Worklists (for Appointing Authorities and Grants only)

A Worklist is a listing of outstanding items that need your attention.

Your Worklist contains links that will take you directly to the item requiring your action. Once the item has been actioned, the item is removed from your main listing but can be accessed via the Worklist Filter.

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Log into Manager Self Service (MSS)?	Sign in to your **MyCWU Dashboard**. For more detailed instructions on logging in, see the **Additional Notes** in the column to the right.	• Open up a browser (Internet Explorer or Firefox on a PC; Safari browser or Firefox on a Mac). • Go to the CWU homepage at www.cwu.edu. • Click on the **MyCWU** link at the top of the page. • When the MyCWU Communication page opens, click on **Sign In** at the top right corner of the page. • Enter your username and password and click **Login**. • Your MyCWU Dashboard will be displayed. • Then click on **Main Menu > Human Resources > Manager Self Service**.
Access information regarding an indirect employee?		• No matter which Manager Self Service page you are viewing in the Human Resources System, access your indirect employees by clicking the **+** icon in front of your current employee's name.
Check what's in my Worklist Items? (for Appointing Authorities & Grants only)	**Main Menu > Human Resources >** Worklist **OR** **|Manager| Tab** *(Situated at the top of your Dashboard)* > **FMS Approvals** pagelet or **HR Approvals** pagelet	• Contain listing of transactional related activities requiring your action. • Click on the link to go directly to the relevant pages.

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View my <mark>staff members' Personal Information</mark>? (for Managers only)	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** View Employee Personal Info **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* • ***Direct Line Reports*** pagelet > Click on the individual tabs (Summary, Job Details, Contact, etc…)	• This page gives managers the ability to view job related and personal bio/demo information of the employees who report directly or indirectly to them. • This **As Of Date** can be back dated or future dated to view employee information during the time that employee reported to you (or will report to you). • Information includes: Employee ID #, First Start Date, Position, Department ID # and Description, Job Code and Description, Location Code and Description, Company, Regular/Temporary, Business Unit, and Full/Part Time plus additional links for Addresses, Phone Numbers, Emergency Contact Information, Training and Birthday.

<mark>Manage delegation</mark>?	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** Manage Delegation
	
	OR
	
	|Manager| Tab *(situated at the top of your Dashboard)* > **Manager Self Service** *(on the left)* > Manage Delegation
		• You may delegate to someone outside your department by clicking the **Search by Name** link on the page where you are to choose the person to whom you wish to delegate.
		• ***After you have delegated one or more tasks to someone, HR must run a process (runs every four hours) before that person will see the Manager Self Service link appear in his/her Human Resources menu items.***
		• **The person to whom you are delegating must then accept the Delegation Request in order for the system to allow that person to perform the delegated task(s).** To accept a delegated task:
		  ▪ Click on **Review My Delegated Authorities** on the **Manage Delegation** page.
		  ▪ Choose "Submitted" in the **Show Requests by Status** dropdown field (or leave this field blank), and then click [Refresh].
		  ▪ Check the checkbox next to all delegated tasks that you wish to accept. If multiple tasks have been delegated, the checkbox will indicate **Multiple Transactions**.
		  ▪ Click [Accept].

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		• **My Proxies** – Shows to whom you have delegated which tasks.
		• **Delegated Authorities** – Shows tasks that have been delegated to you.
		• ***You may only delegate any given task to one unique person at a time.***
		• Supervisor cannot delegate a position change.
		• If you need to cancel a delegation, **Revoke** it. To do this:
		  ▪ Click on **Review My Proxies** on the **Manage Delegation** page.
		  ▪ Check the checkbox next to all delegated tasks that you wish to revoke.
		  ▪ Click [Revoke].
		• If someone has delegated a task to you, you must choose to accept it or reject it.

*** Request a Location Change* for a staff member?**	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** Request Location Change **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* > **Manager Self Service** *(on the left)* > Request Location Change	• Check the checkbox for the person(s) to be assigned to a new Timekeep Location. Then click [Continue]. • The **Location Change Date** should be the 1st day of the pay period, which would be either the 1st or 16th of the month. You cannot backdate the **Location Change Date**. • **Even though you may be aware of the new Timekeep Location code, you must use the 🔍 magnifying glass to Look Up the new Timekeep Location.** On the **Look Up Location** page, you may enter the new Timekeep Location code into the field if you know it, and then click [Look Up]. • After choosing the Timekeep Location, click [Submit]. • You will see the **Submit Confirmation**. Click [OK].

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* Request a <mark>Reporting Change</mark> for a staff member? (Use this feature in the following situations ONLY: • *If only one person is in the position and needs to now report to someone else* • *If everyone in the position needs to report to someone else)*	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions > Request Reporting Change** **OR** **|Manager| Tab** *(situated at the top of your Dashboard) >* **Manager Self Service** *(on the left) >* Request Reporting Change	• Select the person(s) to be assigned to a new supervisor. Then click [Continue]. • Enter the **Reporting Change Date**. • Type in the name of the new Supervisor (i.e. Leah Valverde), or use 🔍 to look up the new Supervisor. • Add notes in the **Comment** text box, if needed. • Click [Submit]. • You will see the **Submit Confirmation**. Click [OK].
* Retire an employee?	**MyCWU > Manager Tab > Manager Self-Service (left-hand menu) > Terminate/Retire Employee**	• **Please view the HR Video Guide, MSS Terminate/Retire**

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* Denotes *No Approval* necessary.

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* *Terminate an employee*?	**MyCWU > Manager Tab > Manager Self-Service (left-hand menu) > Terminate/Retire Employee**	• **Please view the HR Video Guide, MSS Terminate/Retire**

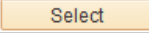# Manager Self Service (MSS)
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Transfer an existing employee to another department or position?	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions > Transfer Employee** **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* > **Manager Self Service** *(on the left)* > Transfer Employee	• **Please verify with HR the new Position Number before beginning this process. You will need the Position Number to carry out this process.** • Click **Select** next to the employee who will be transferring. • Enter the **Transfer Date**, which cannot be back-dated and should be the beginning day of the pay period. That would be the 1st or 16th of the month. This date should be the agreed upon hire date between the old and new manager. This date needs to be in prior to payroll processing. • If you do not know the date that the employee will begin the new position on campus, call your HR Consultant for more information. • Select **Reason for Transfer**. • **Even though you may be aware of the new Position Nbr, you must use the 🔍 magnifying glass to Look Up the new Position Nbr.** • The ⬤ will display next to the item(s) that have changed. • **ADD *NOTES* IN THE *COMMENTS TEXT BOX* EXPLAINING THE TRANSFER, ANY *PAY RATE CHANGES*, OR *CLASSIFICATION CHANGES*.** • Click **Submit**. • If the position transfer comes with a new pay rate, HR will initiate the salary change, and Appointing Authority will approve it. • You will see the **Transfer Approval Chain**.

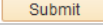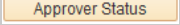# Manager Self Service (MSS)
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View a staff member's <mark>Transfer Status</mark>?	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** View Transfer Status	• The page will show all of your current staff members who are in the process of transferring to another position and the **Workflow Status** of the Transfer. If the person who is to approve the Transfer has done so, the **Workflow Status** will indicate "Success."
Request <mark>Additional Pay</mark> for a current employee?	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** Additional Pay Form **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* **> Manager Self Service** *(on the left)* > Additional Pay	• **Additional Pay** is meant to pay employees for things that are NOT related to work that are performed in connection to a job (exception would be distance ed and retro pay for position reallocations). • Other acceptable uses would be car allowance and relocation allowance. • **Please do not use this form for entering employee jobs or paying employees as part of their regular salary. If it's not clear whether to use this form or not, please contact your HR Consultant.** • Click the |**Add a New Value**| tab. • *If you are unsure of the employee's ID #, you can navigate to **Human Resources > Manager Self Service > CW HR Transactions > View Employee Personal Info** and click* [Select] *next to the employee to view all of that employee's information, or view under the |**Manager**| Tab.* • *Please note that you will only be able to view the "View Employee Personal Info" page or see the Manager Tab if you are a Manager or Supervisor.* *Highlight and copy the ID # of the employee who is to receive the Additional Pay. This number can then be pasted into the **Employee ID** field on the **Additional Pay Form** page. Another option is to use the 🔍 to look up the employee ID.* • Type in the **Employee Name**. • **Additional Pay Begin Date** cannot be back-dated. It must be entered as the 1st day of the pay period, which would be either the 1st or 16th. • *If you leave the **Additional Pay End Date** blank, you must enter*

How do I…	Navigation	Additional Notes
		*additional information in the **More Information** field at the bottom of the page.* • The **Due Date** can be the same as the **Additional Pay Begin Date**. • *If you choose "Other Pay" for the **Reason**, you must enter additional information in the **More Information** field at the bottom of the page.* • Enter **Originator ID** number and **Originator Name**. That is you. • Remember to enter the **Semi-monthly Amount**. • Use the 🔍 to look up the **Earnings Code**, **Accounting Code** and **Appt Authority**, or ask your department support personnel for this information. ***Leave the Earnings Code blank if you chose "Other Pay" for the Reason.*** • To **Submit** (and/or to check the **Approver Status**), click **Save** and scroll back to the top of the page. • Click **Submit**. You will see the **Additional Pay Form Approval Chain**. • To view the status of the transaction submission at a later date, navigate back to the page and use the search page to locate it. Click **Approver Status**.
* Request a ==Position Change== for either an existing employee or a vacant position within my department?	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** Request Position Change **OR**	• This page can be used for a vacant or a filled position. It is used to change the job attributes of a position. • Examples of when to use this page: • to change the funding for a position

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	|Manager| Tab *(situated at the top of your Dashboard)* > **Manager Self Service** *(on the left)* > Request Position Change	- to change the Supervisor - to change the position's FTE - to change an employee's Union status - to upgrade a person's position to a more desirable one (changing the **Job Code**) **Admin Assistants only** – to extend FYR jobs - To extend a Temporary/Hourly employee assignment or add an additional assignment. **All Temporary/Hourly assignment changes/additions require that you submit a Temporary Appointment Web Form located here:** http://www.cwu.edu/hr/cwu-temporary-appointment-form-taf. - All **Temp/Hourly employees** have the following Position Number**: 0069xxxx)**. *Do not* use **MSS - Position Change** to hire a **new** Temp/Hourly Employee. All new and rehired (**employees with no active job in the system**) must apply to a Temp/Hourly Pool in Recruiting Solutions. For more information on how to hire a new (or rehire a terminated employee), please follow the Temp/Hourly hiring procedure found at: http://www.cwu.edu/hr/temps. - The **New Effective Date** should be the start of the new pay period, which would be the 1st or 16th of the month. - For the **Recruitment** field, choose: *Vacancy/Rehire* for Recruiting *Current Employee/Extend Temp* for all other changes - All **student employees** have the following Position Number: **0059xxxx**. *If you are the supervisor of the person whose position is changing, be sure you know the person's current Position Number before attempting the Position Change (Locate the*
	If the **Manager Positions pagelet is not on your Manager Dashboard, click Personalize* Content *link located at the top left corner of your Dashboard, and select the **Manager***	

How do I…	Navigation	Additional Notes
	Positions checkbox under the **CW Manager Dashboard** category. Then click Save.	current Position Nbr here: |***Manager***| *Tab >* ***Manager Positions*** *pagelet >* ***Position*** *column.).* • *Highlight and copy the Position Nbr of the Position that is to change. This number can then be pasted into the search field on the* ***Request Position Change*** *page.* • **If you are dealing with a student or temp/hourly employee, be sure to use the Notes field toward the bottom of the page to enter the person's Name and ID number (and any other important information regarding the Position Change).** • If the position change comes with a new pay rate, HR will initiate the salary change, and Appointing Authority will approve it. • This form will be routed to Appointing Authority and to Budget.

How do I…	Navigation	Additional Notes
Request the creation of a New Position?	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** Request New Position **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* **> Manager Self Service** *(on the left)* > Request New Position	• Click the |**Add a New Value**| tab. • Make sure that the **Position Start Date** that you enter for the New Position is prior to the date that you want the person you hire to start. The position must exist before someone can be put into that position. • The **Due Date** can be the same as the **Position Start Date**. • Use the 🔍 to look up the **Job Code**, **Full/Part Time**, **Location Code**, **Reports To** Position Number, **Union Code**, **Department**, **Account Code 1** and **Appoint Authority**, or ask your department support personnel or HR Consultant for this information. • Add notes to the **More Information** field, if necessary. • To **Submit** (and/or to check the **Approver Status**), first click [Save]. Then scroll back to the top of the page to click [Submit]. You will see the **Request a New Position Approval Chain**. • To view the status of the transaction submission at a later date, navigate back to the page and use the search page to locate it. Click [Approver Status]. • **After all approvals, the Budget Office will notify the originator of the new Position Number.**
Approve or Deny Requests made by my staff members? (for Appointing Authorities & Grants only)	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** Review Transactions **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* **> Approvals** *(on the left)*	• If you are an *Appointing Authority* or *Grants approver*, you will receive an email for each request requiring action. • Appointing Authorities can Approve or Deny requests. • Leave that requires supporting documentation includes: Compassionate Leave, Emergency Attendance Leave, Jury Duty, Military & Sporting Leave. • Personal Leave (Sick & Carer's) requires a Doctor's Certificate after 3 days of leave.

How do I…	Navigation	Additional Notes
View a current staff member's Salary Change?	**Main Menu > Human Resources > Manager Self Service > CW HR Transactions >** View Ad Hoc Salary Chg Status	
View a summary page of the Training one of my staff members has taken?	**Main Menu > Human Resources > Manager Self Service > Learning and Development >** Training Summary **OR** **|Manager| Tab** *(situated at the top of your Dashboard) >* ***Scheduled Training*** *pagelet*	• Select the current staff member whose completed Professional Development training you wish to view. • Click Training.

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Request training enrollment for my direct reports?	**Main Menu > Human Resources > Manager Self Service > Learning and Development >** Request Training Enrollment	• Click Search by Course Name. • When the **Course Search** page displays, leave the **Course Name** field blank if you just want to see all courses offered. • Click `Search`. • Use the scroll bar to scroll through the list of courses. • Click View Available Sessions next to the course you want to enroll someone in. • Click the **Session** number for the session you desire (i.e. 0031). • Click `Continue`. • Check the checkboxes next to all direct reports you would like to enroll in the course. If you want to enroll *all* of your direct reports, you may click the `Select All` button toward the bottom of the page. • Then click `Continue`, followed by `Submit`. • Finally, click `OK` on the **Confirmation** page. • ***Be sure to let your direct reports know that you have enrolled them in a course (including date, time and location). They do not receive any notification from the system.***
Get assistance with the Manager Self Service Processes previously listed?		To speak to someone regarding **general navigation questions/content expertise** about Manager Self Service functionality, please call **509-963-1646** or **509-963-1280**, or email hrdata@cwu.edu.
Access the Payroll Calendar?	http://www.cwu.edu/financial-affairs/payroll	

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Approve <mark>Online Travel Authorization</mark> and Expense Reports?	For more detailed instructions on logging in, see the **Additional Notes** in the column to the right. Navigate to: **Main Menu> Financial Management> Manager Self Service > Travel and Expenses Center > Approvals >** Approve Transactions **OR** **|Manager| Tab** *(situated at the top of your Dashboard) >* **Approvals** *(on the left) >* Approve Travel Transactions **OR** **|Manager| Tab** *(situated at the top of your Dashboard) >* ***FMS Approvals*** pagelet **If the pagelet is not on your Dashboard, click Personalize* Content *link located at the top left corner of your Dashboard, and select the* ***FMS Approvals*** *checkbox under the* ***CW Manager Dashboard*** *category and click Save.*	• Open up a browser (Internet Explorer or Firefox on a PC; Safari browser or Firefox on a Mac). • Go to the CWU homepage at www.cwu.edu. • Click on the [MyCWU] link at the top of the page. • When the MyCWU Communication page opens, click on [Sign In] at the top right corner of the page. • Enter your username and password and click Login. • Your MyCWU Dashboard will be displayed • For further information, visit the Travel Website at http://www.cwu.edu/financial-affairs/travel or email traveldesk@cwu.edu. • To speak to someone regarding **travel questions**, please call **509-963-1986**.

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Approve Online Purchase Requisitions?	For more detailed instructions on logging in, see the **Additional Notes** in the column to the right. Navigate to: **Main Menu> Financial Management> Manager Self Service > Procurement >** Manage Approvals **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* > **Approvals** *(on the left)* > Manage Requisition Approvals **OR** **|Manager| Tab** *(situated at the top of your Dashboard)* > *FMS Approvals* pagelet *If the pagelet is not on your Dashboard, click Personalize Content link located at the top left corner of your Dashboard, and select the **FMS Approvals** checkbox under the **CW Manager Dashboard** category and click Save.*	• Open up a browser (Internet Explorer or Firefox on a PC; Safari browser or Firefox on a Mac). • Go to the CWU homepage at www.cwu.edu. • Click on the **MyCWU** link at the top of the page. • When the MyCWU Communication page opens, click on **Sign In** at the top right corner of the page. • Enter your username and password and click Login. • Your MyCWU Dashboard will be displayed. • For further information, visit the Purchasing Website at http://www.cwu.edu/contracts/purchasing-home or email purchasing_office@cwu.edu • To speak to someone regarding **purchasing questions**, please call **509-963-1001**.