

# LAFAYETTE

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# COLLEGE

## **Banner Leave Approval Process For Supervisors**

## Leave Approval Process for Supervisors

Banner Leave Reporting is the new process for administrative staff to enter Leave Reports and/or Request Time Off in advance through the Banner Employee Self-Service (ESS) portal. The leave reporting period will be from the first day of the month through the last day of the month. Reporting for each month will be due from the employee by the 8<sup>th</sup> of the following month, supervisors/approvers will approve the leave report by the 10<sup>th</sup> of the following month.

### What's new?

- Leave time will no longer be tracked via submission of a Qualtrics Survey.
- Leave usage will be applied in Banner (e.g., deducted from leave balances) upon supervisor approval.
- Leave time should be requested in either half days (.5) or full days (1).
- Leave time taken can be reported any time during the month the absence occurs, until the 8<sup>th</sup> of the following month. If vacation time is planned in advance, employees can use the Request Time Off option to notify supervisors of upcoming planned vacations which may be beneficial to supervisors for departmental planning purposes.
- **Monthly leave reports are only required when leave time is taken in that month.**
- Supervisors/approvers will be responsible to approve the leave report(s) by the 10<sup>th</sup> of the following month.

## Roles

### Administrative Staff

Administrative staff will utilize this system for reporting of vacation, sick, floating holidays, jury duty, MLK or President's Day and bereavement leave. The leave reporting period is the first day of the month through the last day of the month. The Leave Report must be submitted each month that leave is taken. Employees should submit their Leave Report no later than the 8<sup>th</sup> of the month following the reporting month.

### Supervisor/Approver

The supervisor is the **approver**. The supervisor has the ability to update, change, return, or approve the Leave Report submitted by their employee(s). The supervisor is responsible for ensuring that all of their employees submit their Leave Report by the 10<sup>th</sup> of each month. Each Leave Report should be reviewed in detail making sure that the leave time submitted is correct, and that the time is assigned to the proper leave type. The leave needs to be approved (and if necessary, corrections made and communicated) prior to the payroll deadlines. An employee cannot approve their own Leave Report.

## Responsibilities

### Administrative Staff Responsibilities

1. Record accurate leave time, in either half days (.5) or full days (1), on your Leave Report, submitting no later than the 8<sup>th</sup> of the following month (to allow time for supervisor review/correction).

2. Select the appropriate leave codes to ensure accurate reporting.
3. Check your leave balances to verify availability of hours reported.
4. Add comments to your Leave Report to document special circumstances, changes to your normal work schedule, or any other important information.
5. Review your Leave Report for accuracy before submitting it for approval.
6. Submit your Leave Report no later than the 8<sup>th</sup> of the month following the month when the leave was taken.
7. With your submission of the Leave Report by the 8<sup>th</sup> of the month, there is time for your supervisor/approver to make changes or return your Leave Report for corrections, and for your final Leave Report to be submitted and approved by the 10<sup>th</sup> of the month.

### **Supervisor/Approver Responsibilities**

1. Verify that all employees have submitted their Leave Report by the 8<sup>th</sup> of the month for the previous month.
2. Notify employees that they need to submit their Leave Report when they have not done so.
3. Review all submitted Leave Reports in detail. It is the responsibility of the supervisor/approver to verify employees have accurately entered the dates leave was taken in accordance with College policy.
4. When corrections are necessary:
  - a. Prior to the 10<sup>th</sup> of the month, return Leave Report with errors to employee for correction. *The employee will receive an email generated by Banner Communication Manager (From the Payroll Department) notifying them you have returned their Leave Report.*
  - b. If an error is discovered after the 10<sup>th</sup> of the month, contact the Payroll Department for instructions for correcting the error.
5. If desired, add comments on the Preview screen of an employee's Leave Report before approving. Comments cannot be added to Leave Reports which have already been approved.
6. Approve all Leave Reports individually by the 10<sup>th</sup> of the month following the reporting month.

### **Timeframes and Deadlines**

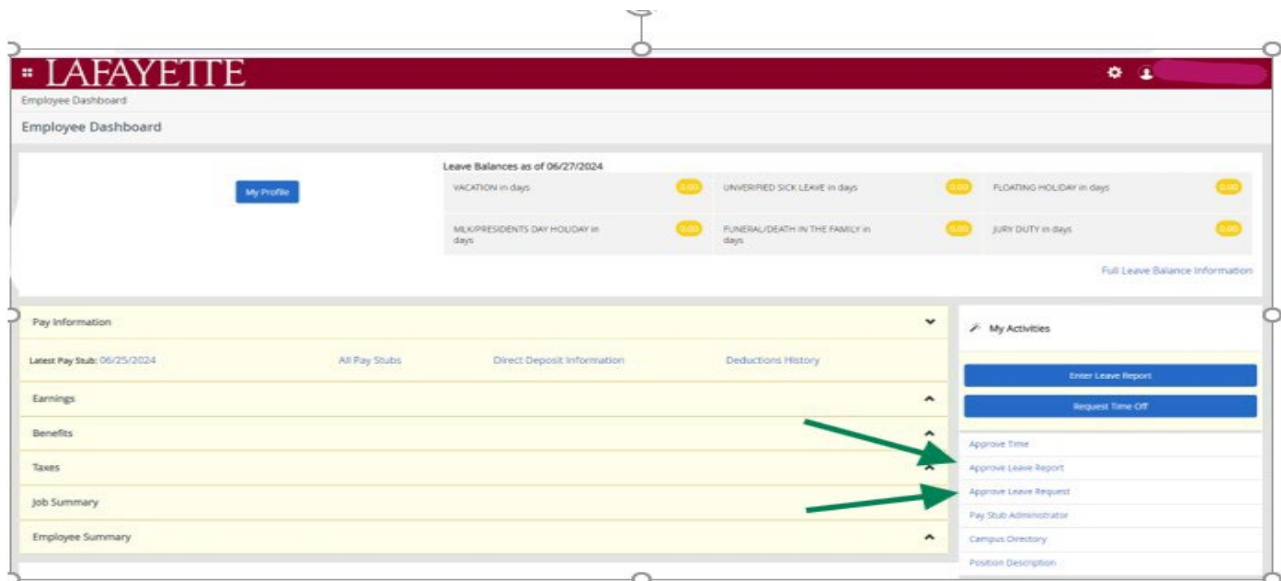
We ask that employees submit their electronic Leave Report to their supervisor by the 8<sup>th</sup> of each month for the following month, to allow time for the supervisor to review and return for correction, if necessary. **Leave Reports must be submitted to document time taken.** Supervisors are responsible for final approval of the Leave Report by the 10<sup>th</sup> of the month following the reporting month.

## LEAVE APPROVAL PROCESS FOR SUPERVISORS - DUE BY THE 10<sup>TH</sup> OF THE MONTH FOLLOWING THE REPORTING MONTH

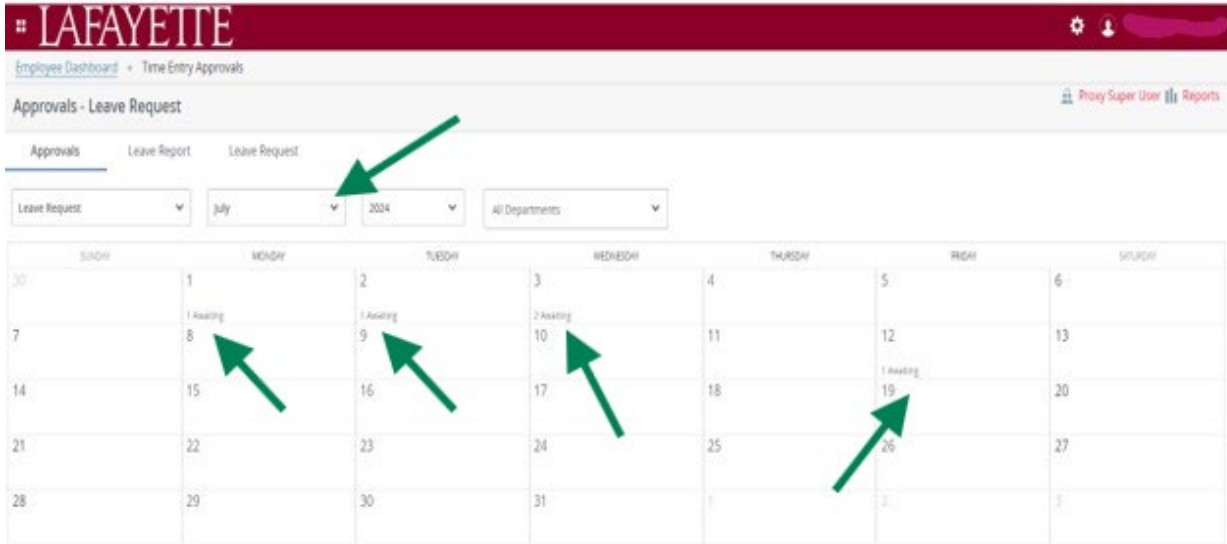
### Logging On To Employee Self-Serve for Leave Reporting

Access to the Banner Leave Reporting system is through the My Lafayette portal.

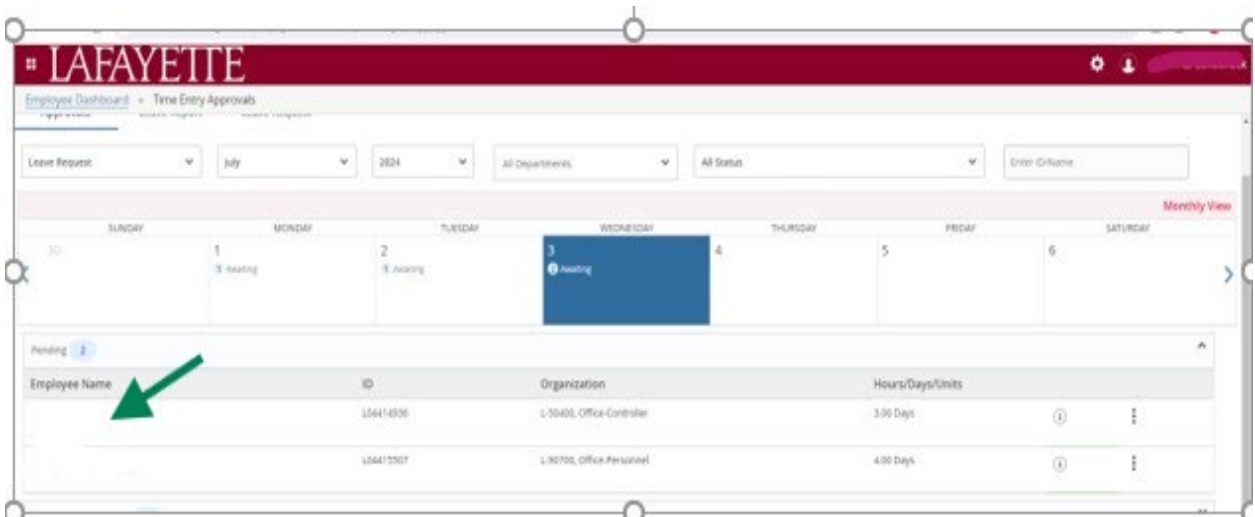
1. **Access the Employee Dashboard** in Banner Employee Self-Service.
  - Access the My Lafayette portal at <https://my.lafayette.edu>.
  - Click on Banner Self Service under MY Lafayette (right hand side), then click on Employee. Log on using Single Sign-on. This will bring you to your employee Dashboard.
2. Under “My Activities” click **“Approve Leave Report”** to access the leave reports or click **“Approve Leave Requests”** to access advance leave requests that require supervisor approval.



- The current month will display in which approvals are needed. Click on the day where “**pending**” is displayed to approve the employees leave report/time off request. This process will need to be repeated for each day on the calendar where “**pending**” appears. To approve leave time for another month, click on the drop-down arrow in the month box to navigate to the month in which you wish to approve leave for.



- Click on the employee’s name to approve the employees Leave Report/Leave Requests. This step will need to be repeated for each employee who appears under the “**Employee Name**” section of this screen.



5. A Leave Request Detail Summary will appear showing the dates and type of leave requested/reported that was submitted by the employee. Confirm that the dates and leave type requested are correct and click “**Approve**”. If corrections are needed click on “**Return for Correction**” to return the leave report to the employee for correction.
  - The “**Return**” button will take you back to the previous page.
  - The “**Details**” button will take you back to the calendar.

**# LAFAYETTE**

Employee Dashboard » Time Entry Approvals » Preview

### Leave Request Detail Summary

Pay Period: 07/01/2024 - 07/31/2024 3.00 Days Pending Submitted On 06/27/2024, 10:59 AM

#### Time Entry Detail

Date	Earn Code	Shift	Total
07/01/2024	VAC, VACATION	1	1.00 Days
07/02/2024	VAC, VACATION	1	1.00 Days
07/03/2024	VAC, VACATION	1	1.00 Days

#### Summary

Earn Code	Shift	Week 1	Week 2	Week 3	Week 4	Week 5	Total
VAC, VACATION	1	3.00					3.00 Days
Total Days		3.00					

#### Routing and Status

Name	Action
	Originated On 06/27/2024, 10:58 AM by Andrea L. Bohn
	Submitted On 06/27/2024, 10:59 AM by Andrea L. Bohn
	Approve by 06/30/2024, 11:59 PM
	Pending Approval

Return      Details      Return for correction      Approve

- Once you hit **“Approve”**, you should receive the following message, **“Leave Request Successfully Approved”**, confirming supervisor approval.

The screenshot shows the Lafayette HR system interface. At the top, there is a navigation bar with the Lafayette logo and a user profile. Below the navigation bar, a green notification banner reads "Leave Request successfully approved." A green arrow points to this banner. The main content area displays a "Leave Request Detail Summary" for a pay period of 07/01/2024 - 07/31/2024, totaling 3.00 days. The status is "Approved" and it was approved on 06/27/2024 at 03:08 PM. The "Time Entry Detail" table shows three entries for 07/01/2024, 07/02/2024, and 07/03/2024, each for 1.00 day. The "Summary" table shows a total of 3.00 days for VACATION. The "Routing and Status" section shows the request was originated and submitted by Andrea L. Sohn and approved by Geoff G. Schoeneck.

- If a leave report/request needs to be returned for correction, click **“Return for Correction”**, please note that you will be required to enter a reason for return in the **“Comment”** section. Once submitted, you should receive the following message, **“Leave Request Successfully Returned”**, confirming that the leave report has been returned to the employee for correction.

The screenshot shows the Lafayette HR system interface. At the top, there is a navigation bar with the Lafayette logo and a user profile. Below the navigation bar, a green notification banner reads "Leave Request successfully returned." A green arrow points to this banner. The main content area displays a "Leave Request Detail Summary" for a pay period of 07/01/2024 - 07/31/2024, totaling 4.00 days. The status is "Returned" and it was submitted by 06/30/2024 at 11:59 PM. The "Time Entry Detail" table shows one entry for 07/03/2024 for 4.00 days. The "Summary" table shows a total of 4.00 days for VACATION. The "Routing and Status" section shows the request was originated and submitted by Karen Yodanis-jones and is currently "In the Queue". A comment at the bottom states "Added on 06/27/2024 (03:19 PM) returning for correction - one day per date." At the bottom right, there are buttons for "Return" and "Details".