

LAFAYETTE

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COLLEGE

**Banner Leave Reporting By
Administrative Staff**

Leave Reporting for Administrative Staff

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 8th of the following month, supervisors/approvers will approve the leave report by the 10th 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 8th of the following month. If vacation time is planned in advance, employees can use the Request Time Off option to notify your supervisor of upcoming planned vacations which may be beneficial to the supervisor 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 10th 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 8th 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 10th 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 8th 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 8th of the month following the month when the leave was taken.
7. With your submission of the Leave Report by the 8th 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 10th of the month.

Supervisor/Approver Responsibilities

1. Verify that all employees have submitted their Leave Report by the 8th 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 10th 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 10th 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 10th of the month following the reporting period.

Timeframes and Deadlines

We ask that employees submit their electronic Leave Report to their supervisor by the 8th 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 10th of the month for the following month.

LEAVE REPORTING BY EMPLOYEE - DUE BY THE 8TH 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. Your current leave balances (effective as of the most recent pay date) are displayed at the top. Under “My Activities” click “Enter Leave Report” to enter new leave information in the current month or “Request Time Off” to request time off in advance.

The screenshot displays the Lafayette Employee Dashboard. At the top, there is a red header with the Lafayette logo and navigation icons. Below the header, the page title is "Employee Dashboard". The main content area is divided into several sections:

- Employee Profile:** A placeholder for a profile picture and a "My Profile" button.
- Leave Balances as of 06/26/2024:** A table showing various leave types and their balances (all are 0.00):

VACATION in days	0.00	FLOATING HOLIDAY in days	0.00	FUNERAL/DEATH IN THE FAMILY in days	0.00
UNVERIFIED SICK LEAVE in days	0.00	JURY DUTY in days	0.00	MILITARY DUTY in days	0.00
- Pay Information:** A dropdown menu with options: "Latest Pay Stub: 01/25/2024", "All Pay Stubs", "Direct Deposit Information", and "Deductions History".
- My Activities:** A section with two prominent blue buttons: "Enter Leave Report" and "Request Time Off". Below these are links for "Approve Time", "Approve Leave Report", "Approve Leave Request", and "Campus Directory".

Two green arrows point to the "Enter Leave Report" and "Request Time Off" buttons in the "My Activities" section.

A leave report can be entered during the current month, or up to 10 days after the month has ended. **However, it is requested that you complete and submit your leave report by the 8th of the month, to allow time for your supervisor to return for correction, if necessary.** Leave reports for the current month are to be approved by the supervisor no later than 10 days after that month ends.

- After you've clicked "Enter Leave Report" or "Request Time Off", the periods that are open for leave reporting are displayed under the bar with your title. Click **"Start Leave Report"** for the leave period you are reporting/requesting leave. Leave time can be reported/requested in advance for any leave periods that are open for reporting.

LAFAYETTE Employee Dashboard » Leave Report

Leave Report

Approvals **Leave Report**

Leave Report Period

Leave Period	Hours/Days/Units	Submitted On	Status
Payroll Admin, 088703-00, L, 50400, Office-Controller Prior Periods			
06/01/2024 - 06/30/2024			In Progress
05/01/2024 - 05/31/2024	8.00 Days	04/18/2024	Pending
04/01/2024 - 04/30/2024	1.00 Days	04/08/2024	Pending
Payroll Admin, 088703-01, L, 50400, Office-Controller Prior Periods			
06/01/2024 - 06/30/2024			Not Started Start Leave Report
05/01/2024 - 05/31/2024			Not Started Start Leave Report
04/01/2024 - 04/30/2024			Not Started Start Leave Report

- Navigate to the day you need to report leave for, and then click on that day, the day will highlight dark blue

LAFAYETTE Employee Dashboard » Leave Report » Payroll Admin, 088703-00, L, 50400, Office-Controller

Payroll Admin, 088703-00, L, 50400, Office-Controller Restart Leave Report Leave Balances

06/01/2024 - 06/30/2024 In Progress Submit By 06/15/2024, 11:59 PM

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
2	3	4	5	6	7	8

Add Earn Code

Earn Code

Select Earn Code

Exit Page Cancel Save Preview

- Click the drop-down for “**Earn Code**” to choose the type of leave you are reporting/requesting.

The screenshot shows the Lafayette HR system interface. At the top, there is a navigation bar with the Lafayette logo and user information. Below this, the breadcrumb trail reads "Employee Dashboard > Leave Report > Payroll Admin, 088703-00, L, 50400, Office-Controller". The main content area displays a calendar for the period 06/01/2024 - 06/30/2024, with Friday, June 7th, highlighted in blue. Below the calendar is a section titled "Add Earn Code" with a dropdown menu open. The dropdown menu lists several options: "VACATION" (highlighted in blue), "FLOATING HOLIDAY", "FUNERAL/DEATH IN THE FAMILY", "Unverified Sick Leave", and "JURY DUTY". A green arrow points to the "VACATION" option. At the bottom of the form, there are buttons for "Cancel", "Save", and "Preview".


- When you choose the type of leave you are reporting/requesting a “**Days**” box will open - enter either half day (.5) or full day (1) in the box.

The screenshot shows the Lafayette HR system interface, similar to the previous one. The breadcrumb trail is the same. The calendar still shows Friday, June 7th, highlighted. In the "Add Earn Code" section, the "VACATION" option is selected in the dropdown menu. A text input field labeled "Days" is now visible, containing the number "1". A green arrow points to this input field. At the bottom of the form, there are buttons for "Cancel", "Save", and "Preview".

- Click “**Save**” at the bottom of the page.

5. After you click “**Save**”, the leave time will display on the date selected and you should receive a message confirming receipt of your submission.

The screenshot shows the Lafayette HR system interface. At the top, there is a navigation bar with the Lafayette logo and user information. Below this, the user is identified as '087446-00, L, 50200, Office-Treasurer'. A green notification box at the top right states 'Leave Report data successfully saved.' with a green checkmark. Below the notification, there are buttons for 'Restart Leave Report' and 'Leave Balances'. A yellow banner indicates 'Leave Report Messages' with a count of 4. The main area displays a calendar for the period '05/01/2024 - 05/31/2024' with a total of '4.00 Days' of leave. The calendar shows days from Sunday to Saturday. Thursday, May 30, is highlighted in blue and shows '0.50 Days' of leave. Below the calendar, there is a section for 'VACATION' with a '0.50 Days' entry and a 'Total: 0.50 Days' summary. At the bottom, there are buttons for 'Exit Page', 'Cancel', 'Save', and 'Preview'.

- If you wish to enter leave on another day, simply click on that day in the calendar and repeat steps 4 and 5 above. *Please note: you must click “**Save**” after each entry.*
6. **To copy the leave time** (e.g., to copy one day, in order to record a week of vacation),
 - Click on the day you are copying from
 - Click the “pages” icon  (found on the right side of the screen, near the middle) to copy.

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Employee Dashboard • Leave Report • Payroll Admin, 088703-00, L, 50400, Office-Controller

Payroll Admin, 088703-00, L, 50400, Office-Controller 🔄 Restart Leave Report 📄 Leave Balances

Leave Report Messages 1

06/01/2024 - 06/30/2024 | 3.00 Days 1 2 In Progress Submit By 06/15/2024, 11:59 PM

SUNDAY	MONDAY	TUESDAY	WEDNESDAY	THURSDAY	FRIDAY	SATURDAY
9	10	11	12	13 1.00 Days	14 1.00 Days	15

➕ Add Earn Code

VACATION 🔄 1.00 Days

✎ 🗑️ ⌵

Total: 1.00 Days

Exit Page Cancel Save Preview

- A new window will open displaying the full leave period.
- **Click the box for each of the days you want to copy to, and then click “Save”.**

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Employee Dashboard • Leave Report • 087446-00, L, 50200, Office-Treasurer

087446-00, L, 50200, Office-Treasurer 🔄 Restart Leave Report 📄 Leave Balances

Leave Report Messages 4

05/01/2024 - 05/31/2024 | 3.00 Days 1 2 In Progress Submit By 06/15/2024, 11:59 PM

Copy Leave Report Entry ✕

FLOATING HOLIDAY : 1.00 Days (05/23/2024, THURSDAY)

Select Options

Copy to the end of pay period

Include Saturdays

Include Sundays

Pay Period: 05/01/2024 - 05/31/2024 🔍

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23 1.00 Days	24	25
26	27	28	29	30	31	1

Cancel Save

Exit Page Cancel Save Preview

- When you have finished entering your leave time, you can click **“Exit Page”** until you are ready to submit your leave report at the end of the month.

The screenshot shows the Lafayette HR system interface for entering a leave report. At the top, the header includes the Lafayette logo and the user's name: "087446-00, L, 50200, Office-Treasurer". Below the header, there are navigation links for "Employee Dashboard" and "Leave Report". A yellow banner at the top indicates "Leave Report Messages" with a notification icon showing the number 2. The main area displays a calendar for the period "05/01/2024 - 05/31/2024" with a total of "2.00 Days" and a "Submit By 06/15/2024, 11:59 PM" deadline. The calendar shows dates 19 through 25, with 1.00 Day of leave entered for Monday (5/20) and Wednesday (5/22). Below the calendar is a section for "Earn Code" with a dropdown menu labeled "Select Earn Code". At the bottom left, a green arrow points to the "Exit Page" button. At the bottom right, there are buttons for "Cancel", "Save", and "Preview".

- When you are ready to submit your leave report, follow **steps 1 and 2**, this will bring you to the available leave reports, click on leave period in which you wish to submit hours for.

The screenshot shows the Lafayette HR system interface for viewing available leave reports. The header includes the Lafayette logo and the user's name: "087446-00, L, 50200, Office-Treasurer". Below the header, there are navigation links for "Employee Dashboard" and "Leave Report". The main area displays a table of available leave reports. A green arrow points to the row for the period "05/01/2024 - 05/31/2024" with "2.00 Days" of leave available. The table has columns for "Leave Period", "Hours/Days/Units", "Submitted On", and "Status".

Leave Period	Hours/Days/Units	Submitted On	Status
087446-00, L, 50200, Office-Treasurer			
06/01/2024 - 06/30/2024	3.00 Days	05/20/2024	Pending
05/01/2024 - 05/31/2024	2.00 Days		In Progress
12/01/2023 - 12/31/2023	0.50 Days		Returned

9. When ready to **submit** your leave report for the full month, you must first click the **“Preview”** button to perform one final review before submitting.

The screenshot shows the Lafayette HR system interface for a leave report. The header includes the Lafayette logo and user information: "Employee Dashboard" > "Leave Report" > "Payroll Admin, 088703-00, L, 50400, Office-Controller". Below the header, there are options to "Restart Leave Report" and "Leave Balances". A yellow notification bar indicates "Leave Report Messages" with a count of 1. The main area displays a calendar for the period 06/01/2024 - 06/30/2024, showing 3.00 Days. The calendar highlights Friday, June 14th, with a 1.00 Days entry. Below the calendar, there is a table with one row: "VACATION" with "1.00 Days". To the right of the table are icons for edit (pencil), copy, and delete (minus sign). A green arrow points to the delete icon. At the bottom right are "Cancel", "Save", and "Preview" buttons.

- If corrections are needed click the **“Return”** button and follow the instructions below.
- **If you need to edit your submission** click the **“pencil” icon** ✎ to edit your submission, and then click **“Save”**.
- **If you need to delete any entries**, click the **“remove” icon** ⊖ to delete any entries, and then click **“Save”**.
- Click (or select/confirm?) the prompt, "Are you sure you want to delete the earning record description?"
- Once you have made the necessary corrections, click on the **“Preview”** button to perform one final review.

- 10. Once you confirmed that you have accurately entered your leave time for month, click on the **“Submit”** button to route your leave report to your supervisor/approver. You are also able to add comments in the **“Add Comments”** section prior to hitting submit.

Employee Dashboard » Leave Report » 087446-00, L, 50200, Office-Treasurer » Preview

Date	Earn Code	Shift	Total
05/20/2024	VAC, VACATION	1	1.00 Days
05/22/2024	UVS, Unverified Sick Leave	1	1.00 Days
05/23/2024	FLH, FLOATING HOLIDAY	1	1.00 Days

Summary

Earn Code	Shift	Week 1	Week 2	Week 3	Week 4	Week 5	Total
VAC, VACATION	1				1.00		1.00 Days
UVS, Unverified Sick Leave	1				1.00		1.00 Days
FLH, FLOATING HOLIDAY	1				1.00		1.00 Days
Total Days					3.00		

Routing and Status

Name	Action
	Originated On 05/20/2024, 04:11 PM by
	Submit By 06/15/2024, 11:59 PM
	In the Queue

Comment (Optional):

Add Comment

2000 characters remaining

Added on 06/15/2024 (11:59 AM)

Return Submit

- Confirm that your Leave Report has been submitted.

Employee Dashboard » Leave Report » 087446-00, L, 50200, Office-Treasurer » Preview

Date	Earn Code	Shift	Total
	VAC, VACATION	1	1.00 Days
	UVS, Unverified Sick Leave	1	3.00 Days
	FLH, FLOATING HOLIDAY	1	1.00 Days
	BER, FUNERAL/DEATH IN THE FAMILY	1	0.50 Days
	Total Days		5.50

Routing and Status

Name	Action
	Originated On 05/20/2024, 04:11 PM by
	Submitted On 05/22/2024, 01:15 PM by
	Approve by 06/15/2024, 11:59 PM
	Pending Approval

Added on 05/22/2024 (01:14 PM)

Leave Report recalled (System Generated)

Added on 05/21/2024 (11:44 AM)

Leave Report recalled (System Generated)

Added on 05/21/2024 (11:00 AM)

Leave Report recalled (System Generated)

Return

- Your Leave Report will move to Pending status awaiting review from your Supervisor/Approver for approval.

- After you submit for approval, if you realize that there was a mistake in your leave report, you can click **“Recall Leave Report”** and it will return to an In Progress status until you re-submit for approval.
- If your supervisor/approver has already approved your Leave Report, you will be unable to recall it.
- **DO NOT FORGET TO RE-SUBMIT FOR APPROVAL WHEN YOU HAVE FINISHED MAKING CORRECTIONS.**

The screenshot displays the Lafayette HR system interface. At the top, the Lafayette logo is visible on the left, and user profile information is on the right. Below the header, the user's role is identified as '087446-00, L, 50200, Office-Treasurer'. A yellow notification bar indicates '4' messages. The main section shows a calendar for the period '05/01/2024 - 05/31/2024' with a total of '6.00 Days'. The calendar highlights the date '22' (Wednesday) with '1.00 Days' of leave. Below the calendar, a summary shows 'Unverified Sick Leave' for '1.00 Days' with a 'Total: 1.00 Days'. At the bottom right, a green arrow points to the 'Recall Leave Report' button, which is located next to a 'Preview' button. The status of the report is 'Pending' and it was 'Submitted On 05/22/2024, 01:15 PM'.