

# Banner Leave Requesting for Non-Exempt Staff

Banner Leave Requesting is the new process for non-exempt staff to enter Leave Requests through the Banner Employee Self-Service (ESS) portal. The leave requesting period will follow the bi-weekly payroll calendar. Requests can be made up to 12 months in advance. Leave Requests cannot be made for Pay Periods with an open Timesheet in Web Time Entry. Here are [Instructions](#) with screen shots, or you can jump to the [Quick Guide](#).

## **What's new?**

- Leave Request can be made through ESS up to 12 months in advance.
- Approved Leave Requests will auto populate leave time into your Timesheet.
- Leave can be requested before it is accrued.
- Ability to view status of Leave Requests.
- Supervisors will be responsible to approve the Leave Requests.

## **Roles**

### **Non-Exempt Employees**

Non-Exempt staff will utilize this system for requesting sick, vacation and personal leave for future pay periods. Time requested in an open pay period can be entered directly into the Timesheet. Non-exempt staff should notify supervisors a Leave Request has been submitted. Reminders are not sent when a leave request is submitted.

### **Approver**

The supervisor is the approver. This individual has the ability to update, change, return, or approve the Leave Request submitted by their employee. The approver should look for open leave requests periodically. Best practice is to review open Leave Requests each time the supervisor approves Timesheets. Each Leave Request should be reviewed in detail making sure that the leave time requested is correct, and that the time is assigned to the proper leave type. The leave should be approved (and if necessary, corrections made and communicated) prior to the start of the applicable pay period. Employees cannot approve their own Leave Requests.

### **Proxy**

A proxy is an individual designated by the approver in ESS to act on the approver's behalf to update, change, return, or approve the Leave Requests submitted by their employee. If you have been designated as a proxy for an approver, you will be able to modify, return, and approve leave requests on behalf of that approver. An employee cannot be assigned as a proxy to approve their own Leave Request.

## **Responsibilities**

### **Employee Responsibilities**

1. Record accurate hours and days on your Leave Request.
2. Select the appropriate leave codes to ensure accurate requesting.
3. Add comments to your Leave Request to document special circumstances, changes to your normal work schedule, or any other important information.

## Banner Leave Requesting for Non-Exempt Staff

4. Review your Leave Request for accuracy before submitting it for approval.
5. Submit your Leave Request in advance of the start of the affected pay period and allow adequate time for supervisor review.
6. ESS will not notify your supervisor a Leave Request has been submitted. It is recommended you notify your supervisor that you have submitted a Leave Request.

### Approver Responsibilities

1. Review all submitted Leave Requests in detail. It is the responsibility of the approver to verify the employee has accurately entered the hours/dates leave is requested in compliance with University policy.
2. When corrections are necessary:
  - a. Return Leave Request with errors to employee for correction before the applicable pay period begins. *The employee will receive an email generated by Banner Communication Manager (From IWU Payroll) notifying them you have returned a Leave Request.*
  - b. If an error is discovered after applicable pay period is opened, instruct the employee to record approved leave time on their Timesheet.
3. If desired, add comments on the Preview screen of an employee's Leave Request before approving. Comments cannot be added to Leave Requests which have already been approved.
4. If you will not be available to approve Leave Requests, designate a proxy to perform your responsibility in your absence. Multiple proxies can be designated; an employee may never be designated as their own proxy.
5. Notify your proxy to review and approve Leave Requests on your behalf when you are not going to be available to perform this responsibility.
6. ESS will **not** notify you a Leave Request has been submitted. It is recommended you periodically review for Leave Request and/or develop a communication plan between you and your employee(s).

### Proxy Responsibilities

1. Understand the required steps to approving Leave Requests and related policies.
2. Assume the role and responsibilities of 'acting as approver' when designated by the approver.

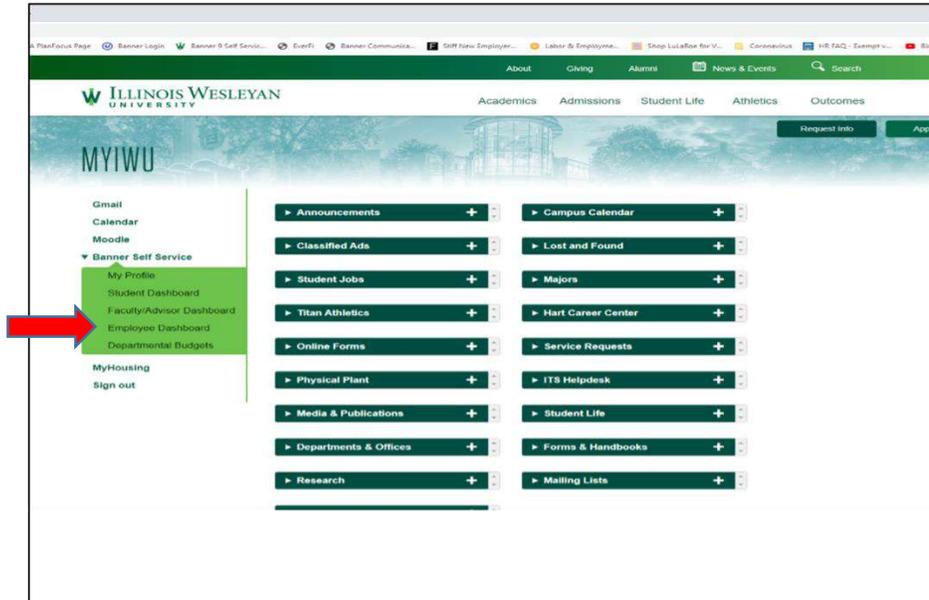
## LEAVE REQUESTING BY EMPLOYEE

### Logging on to ESS for Leave Requesting

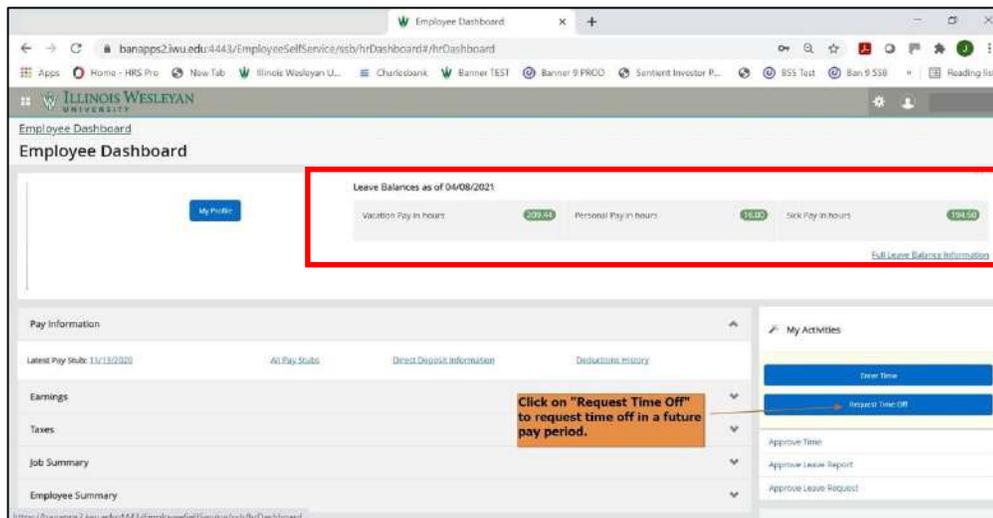
Access to the Leave Requesting system is through the **MyIWU** portal, which is accessible from any computer with access to the Internet.

1. **Access the Employee Dashboard** in Banner ESS.
  - Access the MyIWU portal at <https://my.iwu.edu>.
  - Enter your network username and password. This is the same username and password that you use to access your email.
  - Click on "**Banner Self Service**" under MYIWU (left hand side), and then in the drop-down click "**Employee Dashboard**"

## Banner Leave Requesting for Non-Exempt Staff



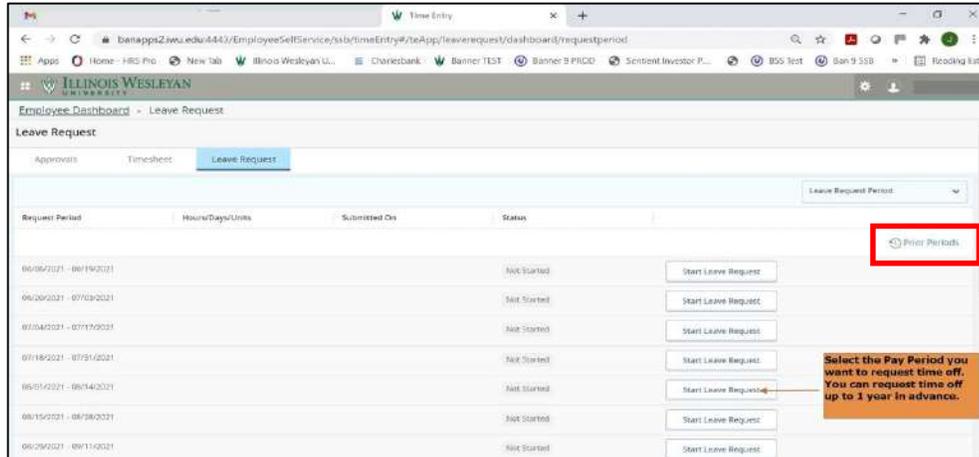
4. Your current leave balances (effective as of the most recent pay date) are displayed at the top. Under “My Activities” click “**Request Time Off**” to enter new requested leave.



*A Leave Request can be entered up to 12 months in advance.*

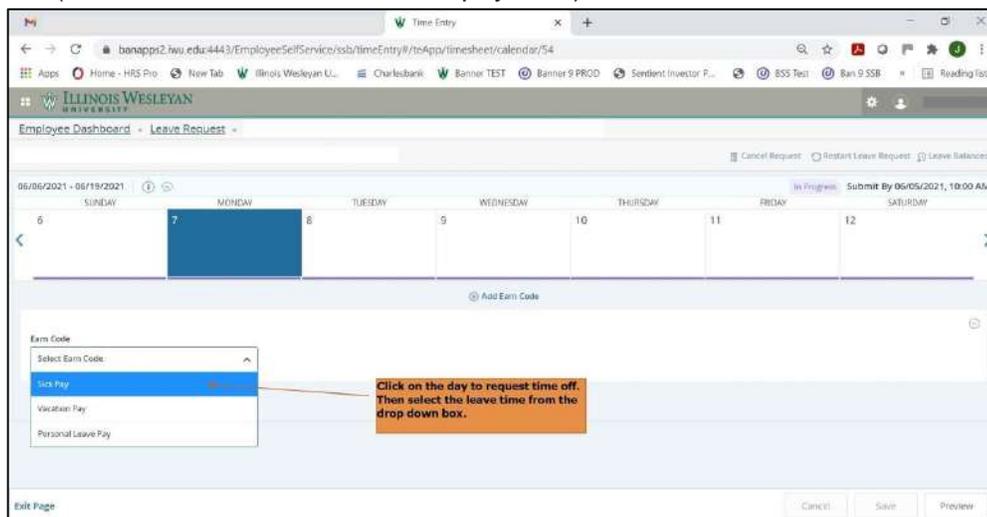
5. After you've clicked “Request Time Off”, the periods that are open for leave requesting are displayed under the bar with your title. Prior Leave Requests can be viewed by clicking on “**Prior Periods**”. Click “**Start Leave Request**” for the pay period you are requesting.

## Banner Leave Requesting for Non-Exempt Staff



6. On the next screen:

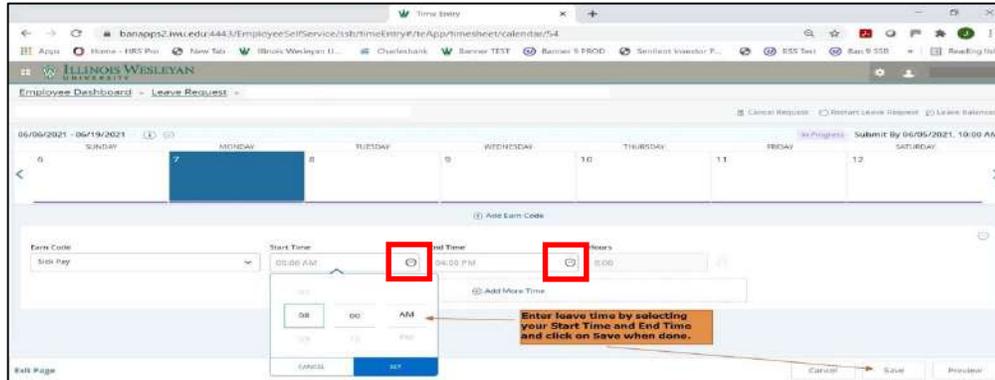
- Navigate to the day you want to request leave for and click on that day.
- Click the drop-down for “Earn Code” to choose the type of leave you are requesting.
  - Options are sick pay, vacation pay, and personal leave pay.
- You can click on “**Leave Balances**” to view Your current leave balances (effective as of the most recent pay date).



7. After selecting an Earn Code, click on the Clock icon to enter Start Time and End Time for leave by scrolling to the appropriate hour, minute, AM/PM selection and click on “**Set**”.

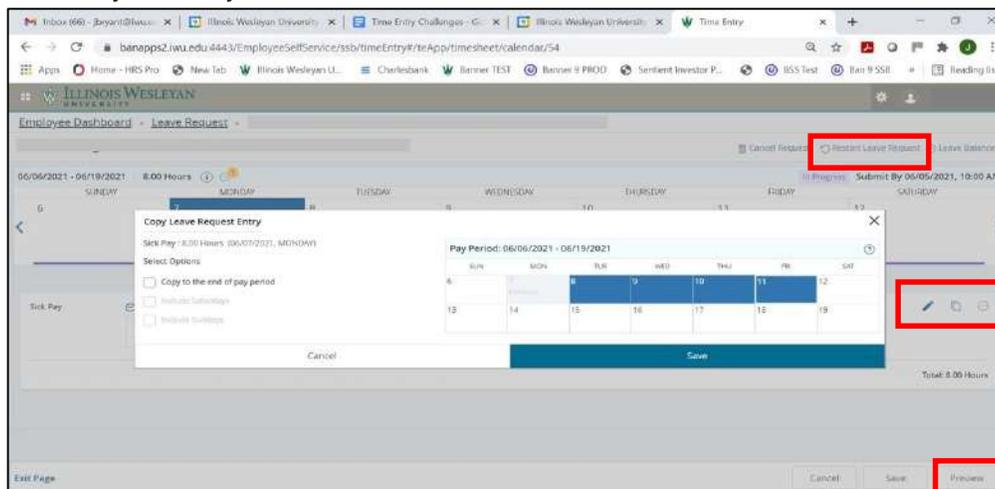
- Leave time can also be entered manually and must be in the exact format of **hh:mm am**.
- Leave may be requested in  $\frac{1}{4}$  hour increments.
- The system will automatically calculate the hours.
- To request a full day, 8 hours must be reflected.
- Click “**Save**”

## Banner Leave Requesting for Non-Exempt Staff



After you click “Save”, the hours of leave time are displayed on the date selected.  
**Please note: you must click “Save” after each entry.**

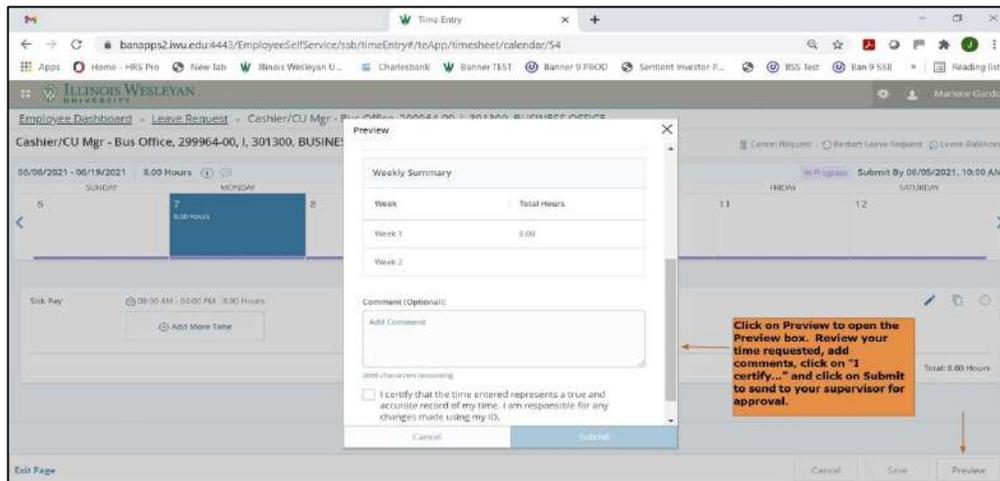
8. You can copy (e.g., to copy one day, in order to record a week of vacation), delete, or modify an entry as described below.



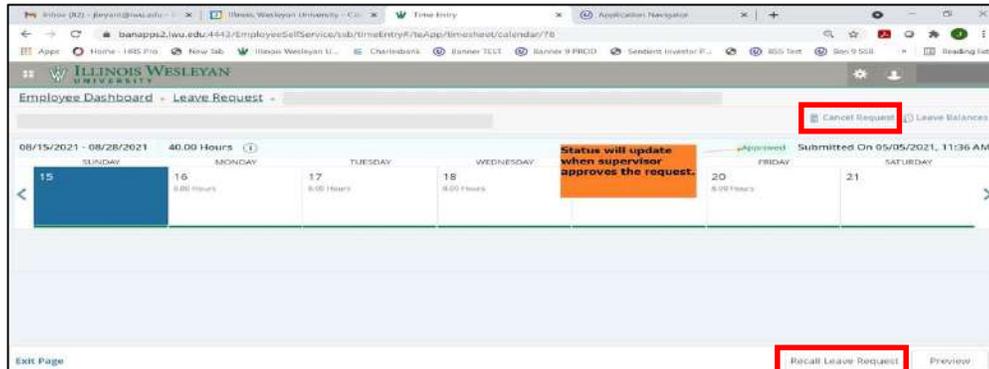
- Click on the day you are copying from.
  - Click the “pages” icon  (found on the right side of the screen, near the middle) to copy.
  - A new window will open displaying the full pay period.
  - Click the box for each of the days you want to copy to, and then click “**Save**”.
- If you need to edit your submission after you’ve clicked Save, click the “**pencil**” icon  to **edit** your submission, and then click “**Save**”.
- If you need to delete any entries after you’ve clicked Save, 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?"
- Leave Requests can be started over by clicking on “**Restart Leave Request**”.
  - Note that all current Leave Request entries will be deleted, and the Leave Request will be set back to the beginning.

## Banner Leave Requesting for Non-Exempt Staff

- You are prompted to either click on **“Restart Leave Request”** to delete your entries or **“Cancel”** to continue with the current entries.
  - When ready to submit your Leave Request, you must first click the **“Preview”** button
9. After Preview has been selected:
- A Weekly Summary of leave requested is displayed for the pay period.
  - In the **“Comment”** box, you can add comments to your supervisor.
  - You must check the box acknowledging **“I certify....”** before you can submit your Leave Request for approval.
  - Click **“Submit”** to submit your Leave Request to your supervisor for approval



10. Once approved your Leave Request Status will updated to Approved



Please note:

- Leave Requests will not impact leave balances.
- Leave balances are updated when the Timesheet is processed.
- Requested leave will auto populate into the applicable Timesheet.
- Requested leave can be recalled at any time prior to the applicable pay period.
- Future submitted Leave Requests can be cancelled by clicking on **“Cancel Request”**.

# Banner Leave Requesting for Non-Exempt Staff

## SUPERVISOR APPROVAL

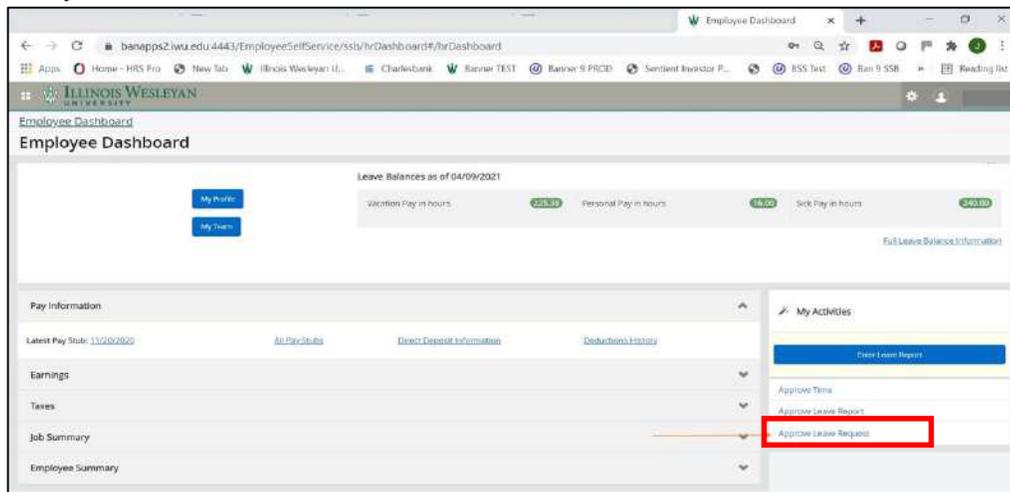
### Logging on to ESS for Leave Request Approval

Access to the Leave Requesting system is through the MyIWU portal, which is accessible from any computer with access to the Internet.

1. **Access the Employee Dashboard** in Banner Employee Self-Serve.

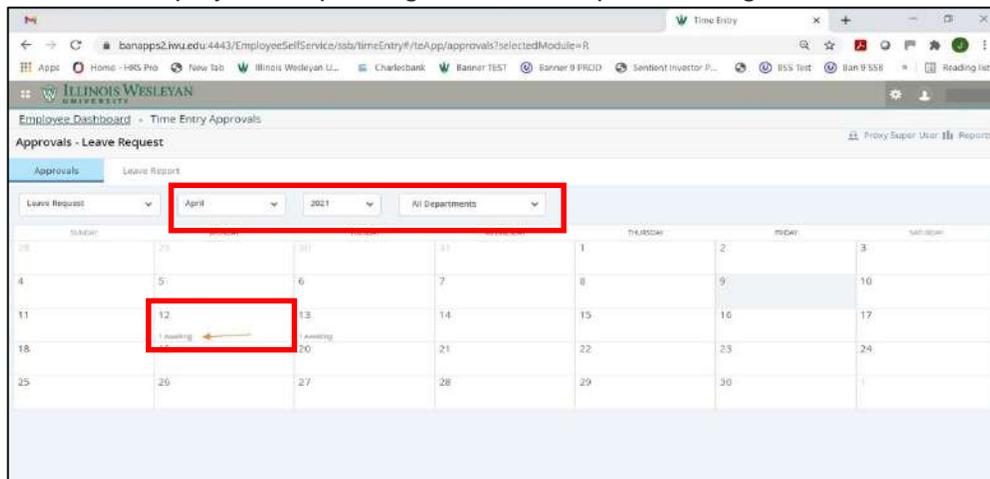
- Access the MyIWU portal at <https://my.iwu.edu>.
- Enter your network username and password. This is the same username and password that you use to access your email.
- Click on “**Banner Self Service**” under MYIWU (left hand side), and then in the drop-down click “**Employee Dashboard**”.

2. Under “My Activities” click “**Approve Leave Request**” to access the Leave Requests that you need to act on.



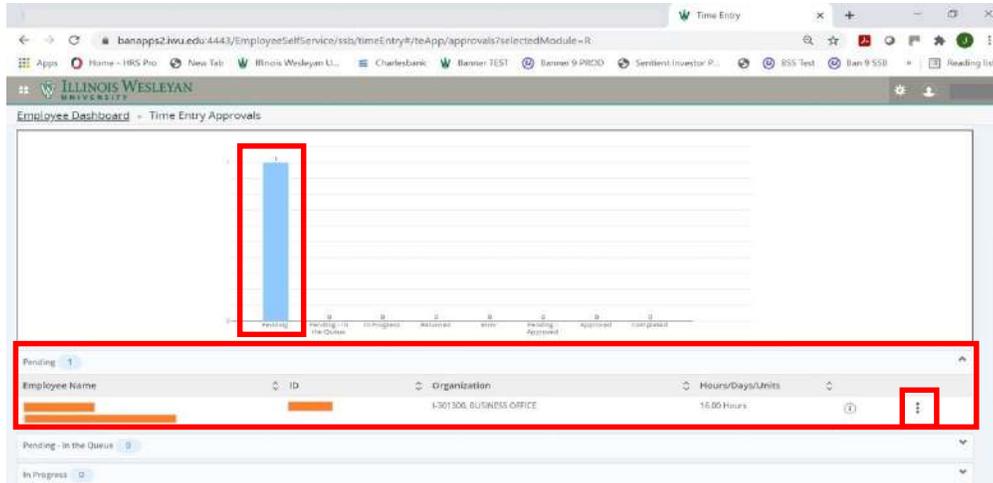
3. This screen will show the status of Leave Requests for your team.

- There are drop-downs that allow you to filter periods to view.
- Click on the calendar day that shows “Awaiting” to display bar graph and list of employees requesting leave for the period being reviewed.

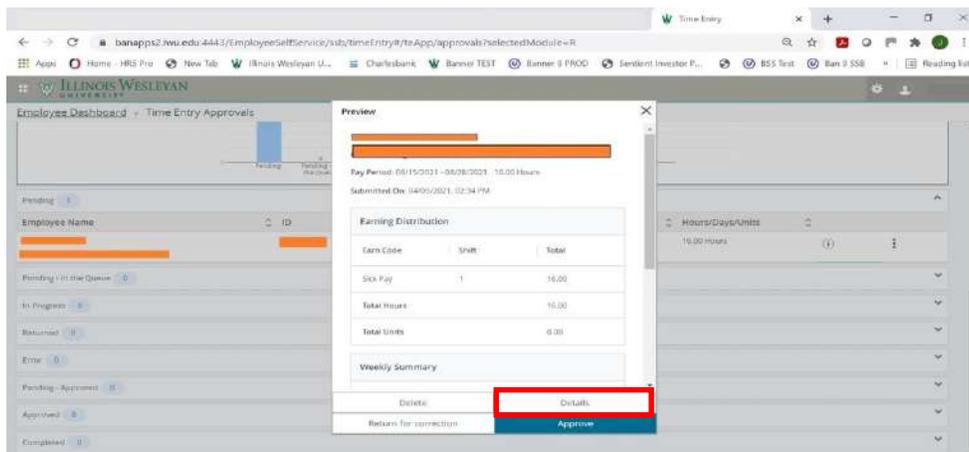


## Banner Leave Requesting for Non-Exempt Staff

- A bar graph and list of employees requesting leave for the period is displayed.
  - You can click on the bar graph to pull up the list of Leave Requests ready for you to approve.
  - Or you can scroll down until you see the name(s) of employees who have Leave Requests “Pending” (Awaiting).
    - By clicking on the ellipsis, you can view current leave balances.
    - Leave balances are updated when the applicable pay period is processed by payroll.
    - Leave Requests do not impact leave balances.



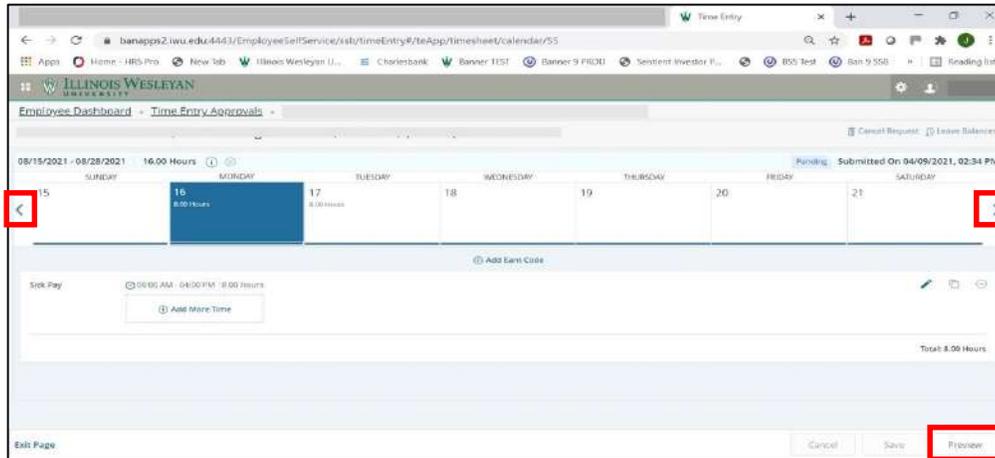
- Navigate to an employee name. Either click on the name or the ellipsis to open the Leave Request.
  - A preview window will open.
  - The first section, titled “Earning distribution”, displays a summary of all the leave types requested for the pay period.
  - The second section, “Weekly Summary”, displays the leave types requested by week.



- Continue to scroll down, to see the following:
  - Comment (Optional) – if your employee entered a comment, it will appear here

## Banner Leave Requesting for Non-Exempt Staff

- If you want to enter a confidential comment (that the employee will not be able to see), check that box.
  - Click **Details** to see the actual leave requested by the employee.
7. The pay period for the requested leave displays.
- Use the directional arrows to scroll through the pay period and verify that accurate leave information has been requested.
  - Click **Preview** to return to the Preview screen.



8. Scroll down to the bottom of Preview screen.
- If you noticed an error in the Leave Request, enter a comment indicating what needs to be corrected and click "**Return for Correction**" (the Confidential Comment box should not be selected, otherwise an error will be generated that the comment should not be marked as confidential).
    - The Leave Request status will change to Returned for Correction and it will then be returned to the employee to correct.
    - The employee will receive an email notification and your comments will be viewable to the employee
  - To approve the Leave Request, click "**Approve**".
  - Once the Leave Request is approved, a message will display indicating it was successfully approved and the status of the Leave Request changes to Approved.
  - When the employee's applicable Timesheet is started, the requested leave auto-populates to the Timesheet.
    - If needed, the employee can adjust the Timesheet to reflect any changes in actual leave taken.

# Banner Leave Requesting for Non-Exempt Staff

## Quick Guide

### Non-Exempt Employees

#### Enter & Submit Leave Request

1. Access Employee Self Service
2. Click **“Request Time Off”**
3. Select the appropriate pay period, by clicking on **“Start Leave Request”**
4. Complete entries to request leave for future pay period:
  - a) Navigate to and click on date the leave is requested
  - b) Select earn code from drop-down
  - c) Record time in and time out for leave to be taken
  - d) Click **“Save”**
  - e) Once all time requested has been entered for the pay period:
    - I. Click **“Preview”**
    - II. Scroll to bottom of Preview window
    - III. (Optional) Add comments you want your supervisor to read
    - IV. Check the **“I certify...”** Statement
    - V. Click **“Submit”**

### Non-Exempt Approvers

#### Return for Correction/Approve Leave Request – Supervisor

1. Access Employee Self Service
2. Click **“Approve Leave Request”**
3. Navigate to the employee to be reviewed.
4. Click **“Details”** to review the leave time requested by the employee. Review for accuracy.
  - a. If you find errors on the employee submission:
    - I. Scroll to bottom of Preview window
    - II. Add comments
    - III. Click **“Return for correction”**
  - b. To approve the time requested:
    - I. Scroll to bottom of Preview window
    - II. Add comments, if desired
    - III. Click **“Approve”**