

## Banner Leave Reporting (BLR) for Exempt Staff

Banner Leave Reporting is the new process for exempt staff, eligible instructional staff and 12-month faculty to enter Leave Reports 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 5th of the following month, and supervisors will approve the leave report by the 10th of the month. Here are [Instructions](#) with screen shots, or you can jump to the [Quick Guide](#).

### What's new?

- Leave time will no longer be tracked via submission of a Google form
- Leave usage will be applied in Banner (e.g. deducted from leave balances) upon supervisor approval
- Leave time taken can be reported any time during the month the absence occurs, until the 5th of the following month.
- **Monthly leave reports are required whether or not leave time is taken** either confirming that no leave time was taken, or recording the leave time that was taken.
- Supervisors will be responsible to approve the leave report by the 10th of the month.

## Roles

### Exempt Employees

Exempt staff, eligible instructional staff and 12-month faculty will utilize this system for reporting of sick, personal, vacation, jury duty, or 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, either indicating time off or indicating the employee did not take any time off. We ask employees to submit the Leave Report no later than the 5th of the month following the reporting month.

### Approver

The supervisor is the approver. This individual has the ability to update, change, return, or approve the Leave Report submitted by their employee. The approver is responsible for ensuring that all of their employees submit the Leave Report by the 5<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.

### Proxy

A proxy is an individual designated by the approver in the Employee Self Service system to act on the approver's behalf to update, change, return, or approve the Leave Report 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 reports on behalf of that approver. An employee cannot be assigned as a proxy to approve their own Leave Report.

## Responsibilities

### Employee Responsibilities

1. Record accurate hours and days on your Leave Report, submitting no later than the 5<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 5<sup>th</sup> of the month following the month when the leave was taken.
7. With your submission of the Leave Report by the 5<sup>th</sup> of the month, there is time for your 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.

### Approver Responsibilities

1. Verify that all employees have submitted their Leave Report by the 5<sup>th</sup> of the month for the preceding month.
2. Notify employees that they need to submit the Leave Report when they have not done so.
3. Review all submitted Leave Reports in detail. It is the responsibility of the approver to verify the employee has accurately entered the hours/dates leave is taken in accordance with University 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 IWU Payroll) notifying them you have returned their Leave Report.*
  - b. If 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 prior to the 10<sup>th</sup> of the month for the preceding month.
7. If you will be unable to approve the Leave Report, 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.
8. Notify your proxy to review and approve Leave Reports on your behalf when you are not going to be available to perform this responsibility.

## Proxy Responsibilities

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

## Timeframes and Deadlines

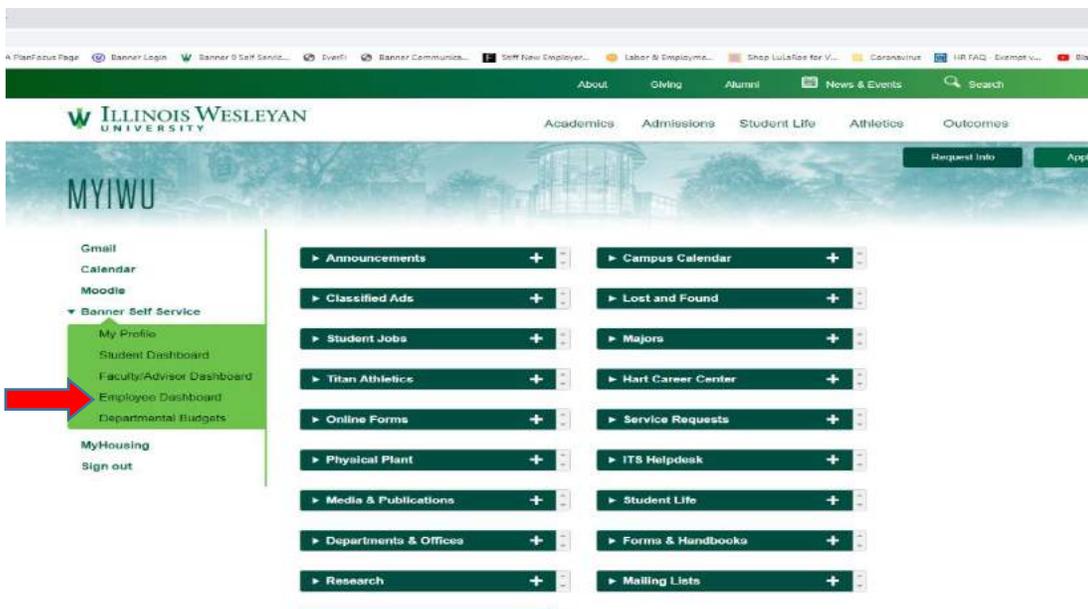
We ask that employees submit their electronic Leave Report to their approver by the 5<sup>th</sup> of each month for the preceding month, to allow time for the supervisor to review and return for correction, if necessary. **Leave Reports must be submitted to either document time taken, or to document that no time was taken.** Supervisors or their proxies are responsible for final approval of the Leave Report by the 10<sup>th</sup> of the month for the preceding month.

## LEAVE REPORTING BY EMPLOYEE – BY 5<sup>TH</sup> OF MONTH FOR THE PRECEDING MONTH

### Logging On To ESS for Leave Reporting

Access to the Leave Reporting 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-Service.
  - 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"



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logged in, you will be prompted to enter your NetID and Password.



- 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.

The screenshot shows the 'Employee Dashboard' for Illinois Wesleyan University. At the top, there is a green header with the university logo and navigation icons. Below the header, the page title is 'Employee Dashboard'. On the left, there are buttons for 'My Profile' and 'My Team'. The main content area displays 'Leave Balances as of 02/04/2021' with three cards: 'Vacation Pay in hours' (138.04), 'Personal Pay in hours' (0.00), and 'Sick Pay in hours' (240.00). Below this, there is a 'Pay Information' section with links for 'Latest Pay Stub: 01/20/2021', 'All Pay Stubs', 'Direct Deposit Information', and 'Deductions History'. On the right side, there is a 'My Activities' section with a red arrow pointing down to a blue button labeled 'Enter Leave Report'. Below this button is another button labeled 'Approve Leave Report'.

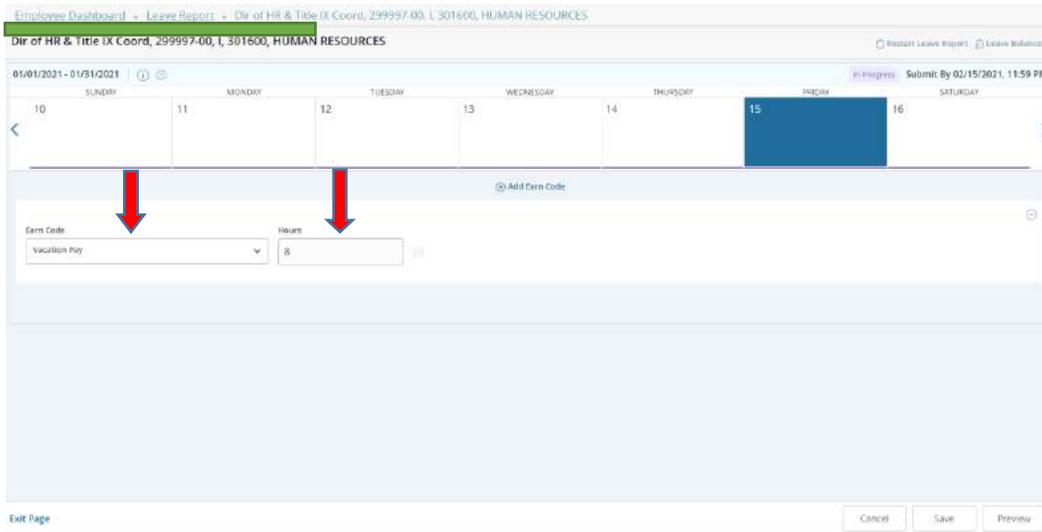
*A leave report can be entered during the current month, or up to 10 days after the month has ended. However, we request you complete and submit your leave report by the 5<sup>th</sup> of the month, to allow time for your supervisor to return for correction, if necessary. Leave reports for one month are to be approved by the supervisor no later than 10 days after that month ends.*

- After you’ve clicked “Enter Leave Report”, the periods that are open for leave reporting are displayed under the bar with your title. Click “**Start Leave Report**” for the pay period you are reporting.

The screenshot shows the 'Leave Report' page for Illinois Wesleyan University. The page title is 'Employee Dashboard > Leave Report'. Below the title, there are two tabs: 'Approvals' and 'Leave Report'. The main content area is a table with columns for 'Leave Period', 'Hours/Days/Units', 'Submitted On', and 'Status'. The table contains two rows of reporting periods. A red arrow points to the 'Start Leave Report' button for the first row. Another red arrow points to the 'Start Leave Report' button for the second row. A third red arrow points to the left of the table. The table data is as follows:

Leave Period	Hours/Days/Units	Submitted On	Status
02/01/2021 - 02/28/2021			Not Started
01/01/2021 - 01/31/2021			Not Started

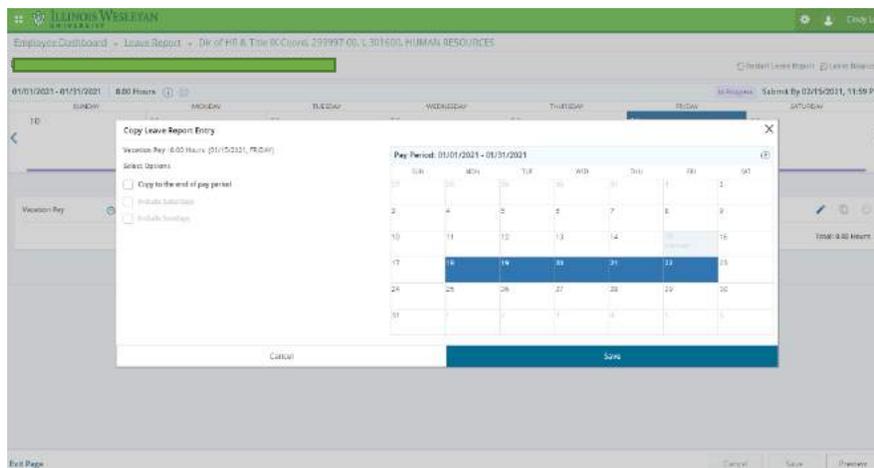
4. On the next screen,
  - **navigate to the day** you need to report leave for, and click on that day.
  - click the drop-down for **“Earn Code”** to choose the type of leave you are reporting. Options are sick, personal, vacation ...
  - An **“Hours”** box will open - Enter the **number of hours** in the box (*Consistent with non-exempt employees, leave may be reported in ¼ hour increments. Absence of a full day is recorded as 8 hours*).
  - Click **“Save”**



5. After you click **“Save”**, the hours of leave time are displayed on the date selected. *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.
- 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”**.



- **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 description?"

7. When ready **to submit** your leave report for the full month, you must first click the “**Preview**” button

- The first section, titled “Earning distribution”, displays a summary of all the leave types reported for the month.

**Preview** ✕

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Pay Period: 01/01/2021 - 01/31/2021 | 49.50 Hours

Submit By: 02/15/2021, 11:59 PM

Earning Distribution	
Earn Code	Total
Vacation Pay	48.00
Sick Pay	1.50
<b>Total Hours</b>	<b>49.50</b>
<b>Total Units</b>	<b>0.00</b>

Weekly Summary	
Week	Total Hours
Week 1	
Week 2	

Cancel
Submit

- The second section, “Weekly Summary”, displays all leave reported by week.

Earn Code	Total
Vacation Pay	48.00
Sick Pay	1.50
Total Hours	49.50
Total Units	0.00

Weekly Summary	
Week	Total Hours
Week 1	
Week 2	
Week 3	9.50
Week 4	40.00
Week 5	

- Continue scrolling down to display the “Comment” box, where you can add comments to your supervisor.

8. **Click the “I certify” button**, and click **Submit** to submit your leave report to your supervisor for approval.

### **SUPERVISOR APPROVAL – BY 10<sup>TH</sup> OF MONTH**

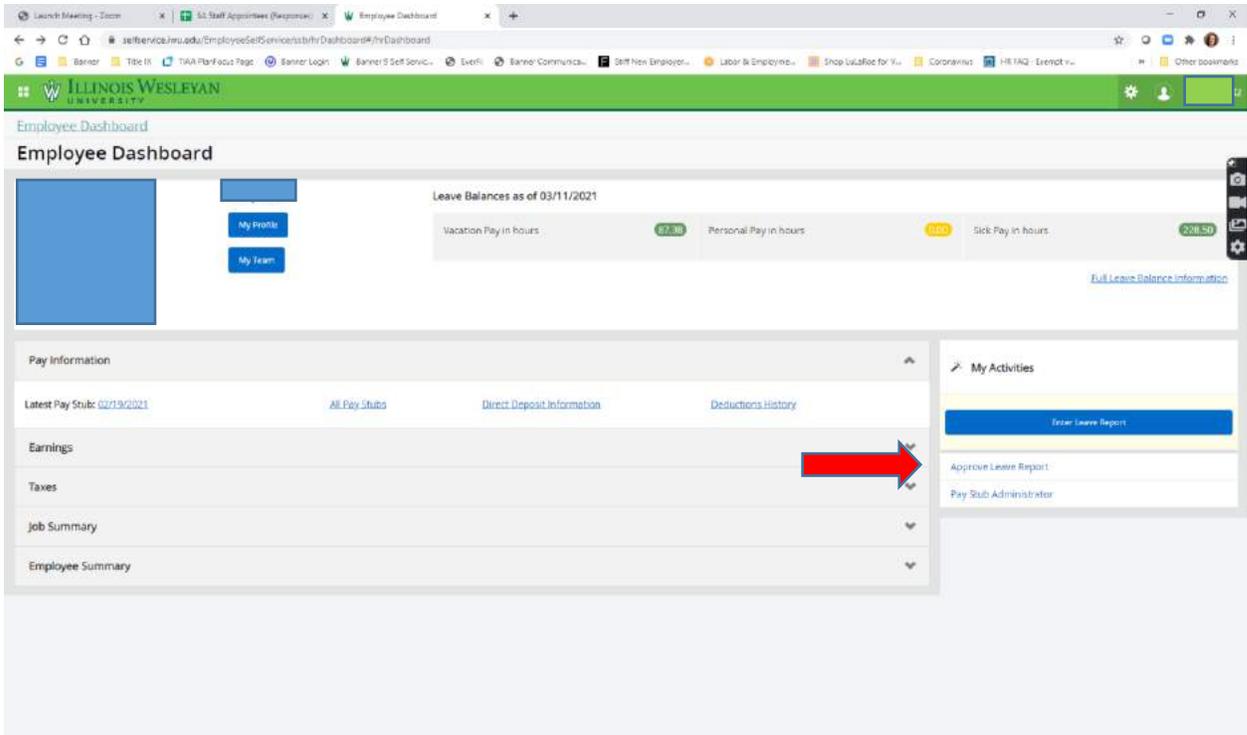
#### **Logging On to ESS for Leave Reporting**

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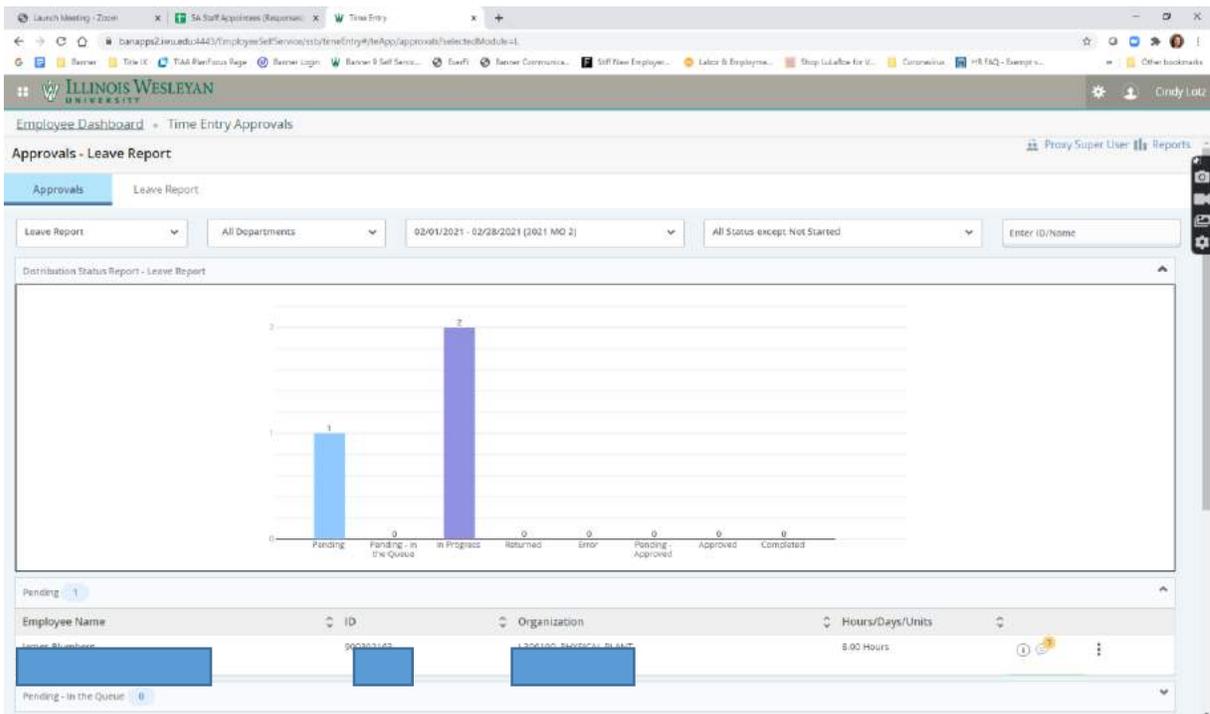
1. **Access the Employee Dashboard** in Banner Employee Self-Serve.

- 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”

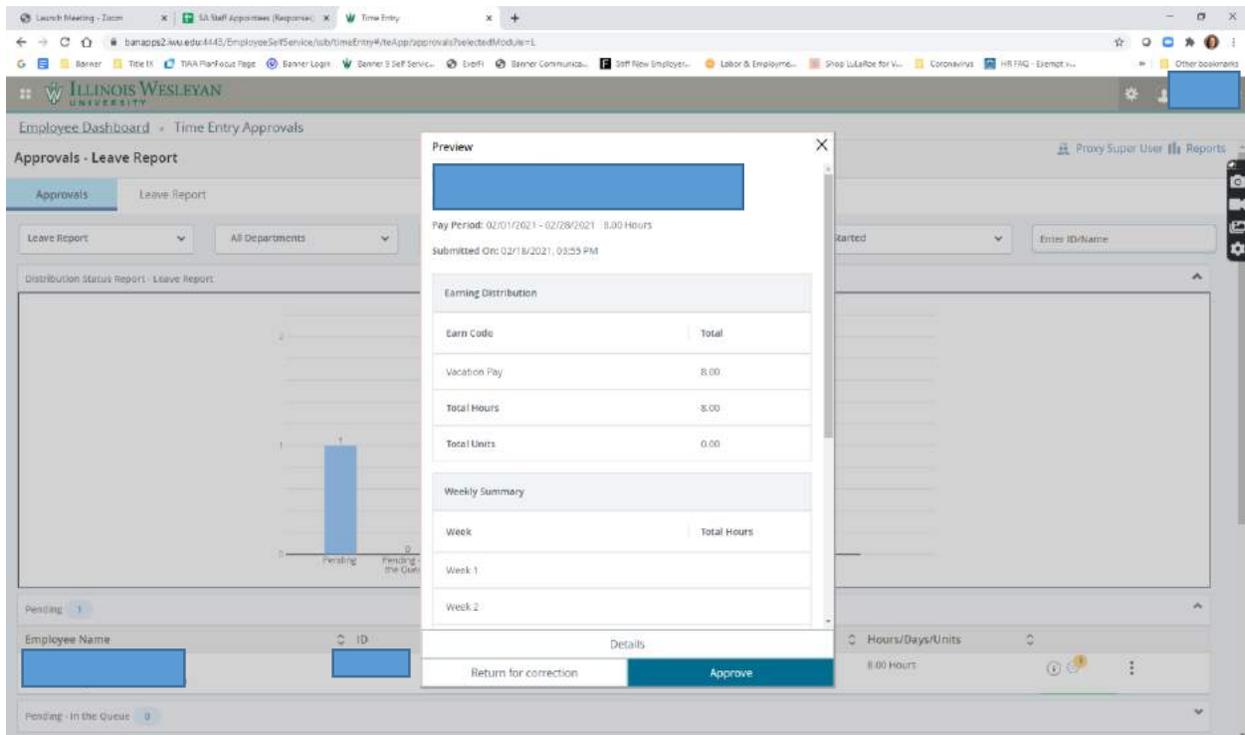
2. Under “My Activities” click “**Approve Leave Report**” to access the leave reports that you need to approve.



3. This screen will show the status of leave reports for your team. There are drop-downs that allow you to filter results. You can either click on the bar graph to pull up the list of leave reports ready for you to approve, or scroll down until you see the name(s) of employees who have leave reports in process.

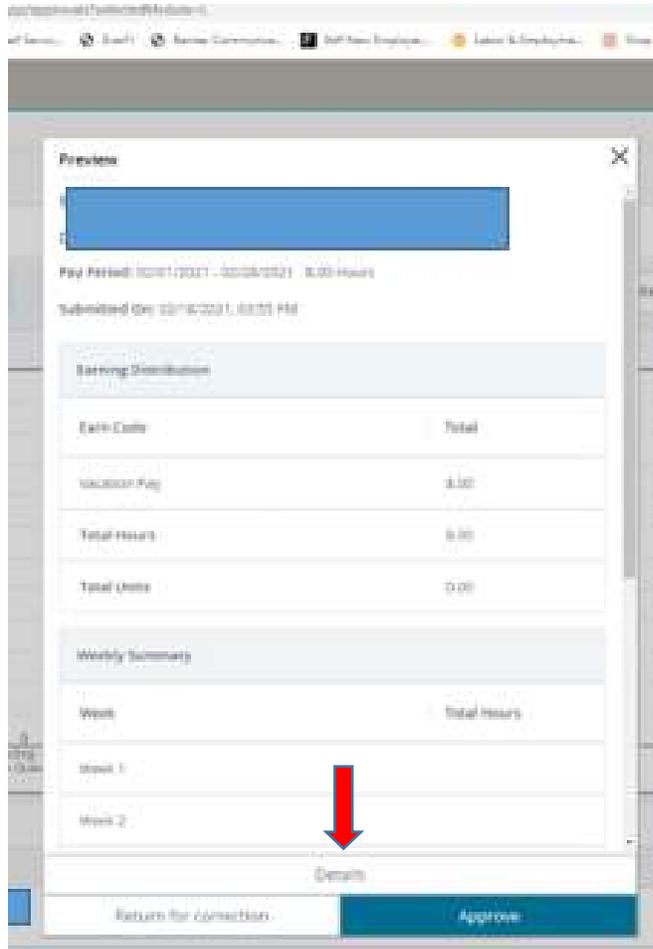


4. Navigate to an employee name. Either click on the name or the vertical ellipsis to open. A preview window will open.
  - The first section, titled “Earning distribution”, displays a summary of all the leave types reported for the month
  - The second section, “Weekly Summary”, displays all the leave types reported for the month



5. Continue to scroll down, to see the following:
  - Comment (Optional) – if your employee entered a comment, it will appear here
  - If you want to enter a confidential comment (that the employee will not be able to see), check that box.

6. Click **Details** to see the actual leave recorded by the employee



7. Use the directional arrows to scroll through the month and verify that accurate leave information has been reported.
8. Click **Preview to return to the Preview screen.**
9. **Scroll down to the bottom of Preview screen.**
10. **If you noticed an error in the leave reporting, enter a comment and click Return for correction.** The leave report will then be returned to the employee for correction.
11. **To approve the leave, click Approve.**

## Quick Guide

### Enter & Submit Leave Report (by 5<sup>th</sup> of the month)

1. Access Employee Self Service
2. Click “Enter Leave Report”
3. Select the appropriate month/leave reporting period
4. Complete report to:
  - a. report leave taken:
    - i. Navigate to and click on date the leave was taken
    - ii. Select earn code from drop-down
    - iii. Record number of hours in “Hours” box (*consistent with non-exempt reporting, leave time can be recorded in ¼ hour increments*)
    - iv. Click “Save”
    - v. Once all time taken has been entered for the month:
      1. Click “Preview”
      2. Scroll to bottom of “Preview” window
      3. (Optional) Add comments you want your supervisor to read
      4. Click the “I certify....” Statement
      5. Click Submit
  - b. report no leave taken:
    - i. Click “Preview”
    - ii. Add comments you want your supervisor to read
    - iii. Click the “I certify.....” statement
    - iv. Click Submit

### Return for Correction (Before 10<sup>th</sup> of the month) /Approve Leave Report (By 10<sup>th</sup> of the month)

1. Access Employee Self Service
2. Click “Approve Leave Report”
3. Navigate to the employee to be reviewed.
4. Click “Details” to review the leave time reported 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 (i.e. you forgot to record leave time on “x” date)
    - iii. Click “Return for correction”
  - b. To approve the time as submitted:
    - i. Scroll to bottom of “Preview” window
    - ii. Add comments, if desired
    - iii. Click “Approve”