Banner Leave Reporting And Approval

February 2018
<table>
<thead>
<tr>
<th>Title</th>
<th>Banner Leave Reporting and Approval</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>January 2018</td>
</tr>
<tr>
<td>Created by</td>
<td>John Rocco, Division of Information Services</td>
</tr>
<tr>
<td>Copyright</td>
<td>Kent State University 2018</td>
</tr>
<tr>
<td>Help</td>
<td>Contact the Help desk, 672-HELP (672-4357)</td>
</tr>
</tbody>
</table>
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About Banner Leave Report

Non-Classified staff and faculty at Kent State University use the Banner Leave Report to report vacation, sick, and personal time for the current and previous pay periods.

Both past and present pay periods are displayed under Leave Report.

Classified Employees

Classified, hourly unclassified, and student employees report time in Empower Timekeeping instead of the Leave Report tool. A link to empower Timekeeping can be found FlashLine in the Employee Dashboard, in the Top Employee Resources Panel.
Non-Classified Employees

Non-Classified employees enter leave data through the Leave Reporting application, the link to which is found in the Employee Dashboard Quick Links, or by scrolling to the bottom of the Employee Dashboard Page. Supervisors will also see a panel displaying any pending approvals that need attention.
Three tables are shown on the page for: **Leave Entry**, **Leave Accrual**, and **Leave Balances**. The first week of the selected leave period is displayed. Links listed under individual dates, and for leave types, are shown as **Enter Hours**, and navigation buttons are included below the tables.

### Leave Report

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation Pay</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Sick Leave Pay</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Personal Leave Pay</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Total Hours:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total Units:</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

**Accrual Rates assume you're working full-time.**

### Leave Accrual

<table>
<thead>
<tr>
<th>Type of Leave</th>
<th>Frequency</th>
<th>Accrual Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick Leave</td>
<td>Pay Period</td>
<td>5.00</td>
</tr>
<tr>
<td>Vacation Leave</td>
<td>Pay Period</td>
<td>6.67</td>
</tr>
</tbody>
</table>

**The leave balances displayed do not include current pay period accruals or adjustment not approved.**

### Leave Balances as of Aug 23, 2016

<table>
<thead>
<tr>
<th>Type of Leave</th>
<th>Hours or Days</th>
<th>Date Available</th>
<th>Available Beginning Balance</th>
<th>Earned</th>
<th>Taken</th>
<th>Available Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick Leave</td>
<td>Hours</td>
<td>0</td>
<td>Sep 29, 2014</td>
<td>20</td>
<td>5</td>
<td>13</td>
</tr>
<tr>
<td>Vacation Leave</td>
<td>Hours</td>
<td>0</td>
<td>Sep 29, 2014</td>
<td>80</td>
<td>5</td>
<td>85</td>
</tr>
</tbody>
</table>

**Submitted for Approval By:**

**Approved By:**

**Report will be Routed to:** Matthew Jones

**RELEASE: 8.11.1.3 MC:12.0**
Enter Leave for a Specific Day

Clicking on the **Enter Hours** link for a specific day and leave type opens a field to enter the number of hours for the selected date and the type of leave taken.

<table>
<thead>
<tr>
<th>Earning:</th>
<th>Vacation Pay</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date:</td>
<td>Aug 16, 2016</td>
</tr>
<tr>
<td>Hours:</td>
<td></td>
</tr>
</tbody>
</table>

Entering the amount and clicking on the **Save** button, adds the leave to the table. Until the report has been submitted for approval, the hours may be edited by clicking on the entered hours to display the entry field once more.

<table>
<thead>
<tr>
<th>Earning:</th>
<th>Total Hours</th>
<th>Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation Pay</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>0</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Personal Leave Pay</td>
<td>0</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>Total Hours:</td>
<td>8</td>
<td>8</td>
</tr>
</tbody>
</table>

The buttons at the bottom of the page allow for navigation through the application.

- **Position Selection** – choose between roles as applicable.
- **Comments** – Include any supporting comments if they are needed.
- **Preview** – View the entries for the entire report span prior to submission.
- **Submit for Approval** – send the report to a Supervisor for review and acceptance.
- **Restart** – Clear the entries to start from a fresh report table.
- **Next** – View the next week in the report time span.
**Certify and Submit the Report**

When the **Submit for Approval** button has been clicked, a certification window will appear for users to verify the information is accurate prior to the report being sent to the Approver. The FlashLine password will need to be entered in the data field and the **Submit** button clicked to send the report.

![Certification Window](image)

Once the report has been submitted, hours can be changed by the report approver, or the report may be returned to the user for correction and resubmission.

**Verification Message**

When the Leave Report has been successfully submitted, a confirmation message will appear on the screen as verification.

![Time and Leave Reporting](image)
Corrections

If the Approver should return the report for correction, they must notify the user.

Notification of return is not automatically generated to the user. The user must be specifically notified.

Comments from the approver should be included on the return of the report for the user.

If the report for the period has not been approved, the report may be edited by the Approver, or returned to the user for amendment. A returned report should be updated and resubmitted, following the same instructions as initially used.

Exiting Leave Report

Exiting the Leave Report application can be accomplished by using the links to Home or Employee Dashboard at the top, right side of the window, or by selecting another item in the FlashLine Left Navigation.
Leave Approval Tool

The Leave Approval period can be selected from a list of recent pay periods, whether bi-weekly or semi-monthly. A link at the bottom of the Leave Approval pane labeled Show More is available to view additional pay periods.

Reporting periods will be separated by job title, and labeled according to their entry status of Not Started, In Progress, Pending, or Completed.

To review information in a leave report, click the appropriate time period to show a dropdown list of options. Clicking a Pending or Complete report displays the leave hours submitted. Clicking an In Progress report displays the time entered, but not submitted, with a button to choose to report the leave time. For a period labeled Not Started, an option to enter data will be available, to begin the leave time reporting.
For each employee who has reported leave taken, a notification for the amount of time and leave type taken is displayed. A **Review Report** button will navigate the supervisor to the Self-Service Banner page for verification of the reported time and approval of the leave.

**Department Summary**

In the Department Summary, the information as reported may be reviewed by the Supervisor for accuracy and approved.
In the Department Summary view, you will see the names of unclassified and faculty members in the selected org (department) code. Each record will contain a Transaction Status:

- **Pending** – waiting for your review.
- **In Process** – the employee has opened the leave period and may have recorded hours. This status indicates that they have NOT yet submitted it for approval.
- **Not Started** – the employee has not viewed or entered hours in the pay period.

A report waiting for approval will contain a hyperlink on the employee’s name, as well as other links in the Other Information column. Selecting the link on the name of the employee will display a view of the leave report in detail, including leave requested for this pay period, balances, routing actions and dates.

From this screen, you will have the option to:

- Approve
- Return for Correction
- Change the Record
- Delete
- Add Comments

Once action has been taken, the status within the self-service record of the employee will be updated indicating the action. If a view of the summary for a different department is available, it may be accessed by clicking the **Select New Department** button.

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**Department Summary**

Select the employee's name to access additional details.

- **COA:** K, Kent State University
- **Department:** 100512, Educational Technology & Distance L
- **Leave Period:** Dec 16, 2006 to Dec 31, 2006
- **Act as Proxy:** Not Applicable
- **Leave Period Leave Entry Status:** Open until Feb 15, 2007, 12:00 A.M.

[Select New Department]  [Select All, Approve or FY1]  [Reset]  [Save]
Employee Leave Report Detail

The approver’s view of an employee leave report is almost identical to what the employee sees, with a few exceptions:

- The title above the header information will say Leave Approval instead of Leave Report.
- Instead of Submit for Approval, which is what the employee sees, there is an Approve button in the approver view, and a Return for Correction button.

Both approver and employee may attach comments to a leave report.

Review the employee’s hours, making sure to click the Next button to view the additional week/week part in the pay period.

**Should a report be returned for correction, this should be communicated to the employee.** There is no automatic notification. The employee does not know to correct the report unless they are informed by the supervisor.