
Banner HR/Payroll

Leave Reporting

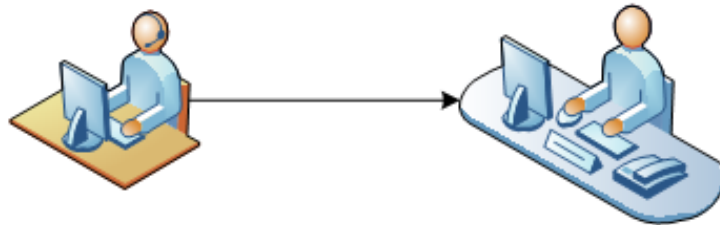
Version 5.0; October 26, 2011

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Purpose

This document is provided as a resource to assist you with completing your Leave Report in the Web Leave Report application. As a salaried exempt employee, you are responsible for completing an accurate leave report for each pay period in which you took time off from your work at Sam Houston State University. The steps within this document will guide you through this process. At any time should you need assistance, feel free to contact your supervisor or one of the individuals listed in the Employee Leave References section.



You enter your leave taken into your online leave report. At the end of the pay period, submit the leave report to your supervisor.

Your supervisor will review your leave report. If it is correct, your supervisor will approve it. Incorrect leave reports will be returned to you.

Glossary

Following is a list of terms, abbreviations and acronyms used in this manual.

Term	Description
INB	Internet Native Banner - a resource system used by SHSU for administrative tasks
mySam	Web portal common to SHSU
Sam ID	Identification number assigned by SHSU. Previously 7 digits but preceded by two leading 0s for use in Banner.
SSB	Self Serve Banner - a resource system used by SHSU for self-service tasks

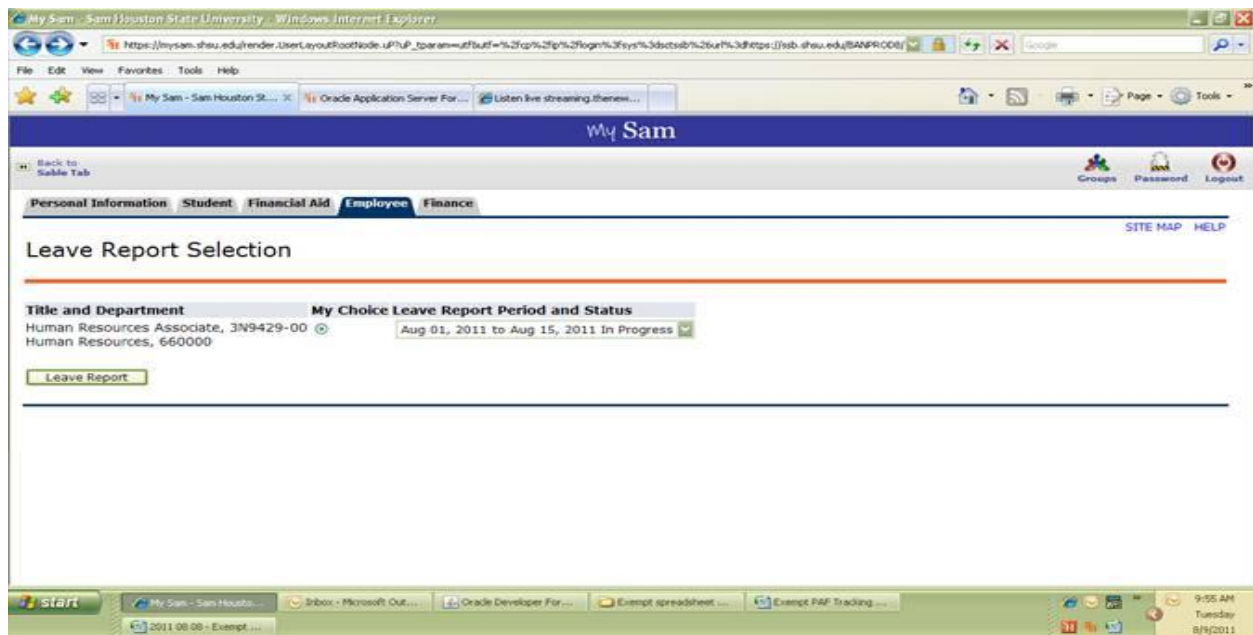
Leave Report Time Entry

Accessing Your Leave Report

Before creating a leave report or submitting a leave report to your supervisor for approval, you will need to follow the steps below to access your leave report. If your leave report is not accessible, you should contact the Payroll Office using the contact information listed in the Employee Leave References section.

1. Log into mySam (may require input of your Sam ID and password).
2. Click the **Employee** tab.
3. Your Leave Report Channel should display the leave reports you currently have available.

If you have more than one job assignment, you will see separate leave reports for each job. Be sure you are selecting the correct leave report before proceeding.



4. Click on the desired leave report.

5. *If you are not a leave report approver skip this step.* Select **Access my Leave Report** from the list by clicking the radio button in the **My Choice** column and then clicking the Select button. (see Fig. 1)

	My Choice
Access my Time Sheet:	<input type="radio"/>
Access my Leave Report:	<input type="radio"/>
Access my Leave Request:	<input type="radio"/>
Approve or Acknowledge Time:	<input checked="" type="radio"/>
Approve All Departments:	<input type="checkbox"/>
Act as Proxy:	Self ▾
Act as Superuser:	<input type="checkbox"/>

Select

Fig. 1

6. Select the radio button in the **My Choice** column (Fig. 2) for the job assignment for which you are entering leave time.
7. Select the pay period from drop down menu located in the column titled **Pay Period and Status** (Fig. 2). The current pay period will always be the default value of the pull-down menu.

Make a selection from My Choice. Choose a Time Sheet period from the pull-down list. Select Time Sheet.

Title and Department	My Choice	Pay Period and Status
Student Assistant - Biology, C10004-00 Dept of Biological Sciences, 11004	<input checked="" type="radio"/>	Sep 16, 2010 to Sep 30, 2010 In Progress ▾
Student Assistant, Library, C10005-00 General Library, 11601	<input type="radio"/>	Sep 16, 2010 to Sep 30, 2010 In Progress ▾

Leave Report

Fig 2.

8. Click the **Leave Report** button to access the selected leave report.

Entering Leave

The steps below will guide you through the process of reporting your time off. Keep in mind that depending on your employee classification, you may see different leave types listed on your leave report from the examples below. However, regardless of the type of leave, the process for reporting your leave is the same.

1. Access your leave report using the instructions in the Accessing Your Leave Report section.
2. Each type of leave will represent a row while each day will represented a column as shown in Fig. 3.

Leave Report											
Title and Number:		Chair, Department of Biology -- A00101-00									
Department and Number:		Dept of Biological Sciences -- 11004									
Leave Report Period:		Oct 16, 2010 to Oct 31, 2010									
Submit By Date:		Nov 02, 2010 by 12:00 P.M.									
Earning	Total Hours	Total Units	Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010	Tuesday Oct 19, 2010	Wednesday Oct 20, 2010	Thursday Oct 21, 2010	Friday Oct 22, 2010	Saturday Oct 23, 2010	Sunday Oct 24, 2010
Vacation Pay	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Sick Pay	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Comp Time Taken	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:	0		0	0	0	0	0	0	0	0	0
Total Units:		0	0	0	0	0	0	0	0	0	0
<input type="button" value="Position Selection"/>		<input type="button" value="Comments"/>		<input type="button" value="Preview"/>		<input type="button" value="Submit for Approval"/>		<input type="button" value="Restart"/>		<input type="button" value="Next"/>	
Submitted for Approval By:											
Approved By:											
Waiting for Approval From:											

Fig. 3

3. To enter leave taken, navigate to the row for the type of leave you are entering, and the column for the day you took the leave (Fig.4). Click on the link titled **Enter Hours**.

Earning	Total Hours	Total Units	Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010
Vacation Pay	0		Enter Hours	Enter Hours	Enter Hours
Sick Pay	0		Enter Hours	Enter Hours	Enter Hours
Comp Time Taken	0		Enter Hours	Enter Hours	Enter Hours
Total Hours:	0		0	0	0
Total Units:		0	0	0	0

Fig. 4

- The top section of the leave report will now display the type of leave you've selected (Vacation Pay in the example in Fig. 5) and the day (Monday, October 18). A field will also be enabled for you to enter your leave.

Leave Report

Title and Number: Chair, Department of Biology -- A00101-00
Department and Number: Dept of Biological Sciences -- 11004
Leave Report Period: Oct 16, 2010 to Oct 31, 2010
Submit By Date: Nov 02, 2010 by 12:00 P.M.

Earning: Vacation Pay
Date: Oct 18, 2010
Hours:

Earning	Total Hours	Total Units	Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010	Tuesday Oct 19, 2010	Wednesday Oct 20, 2010	Thursday Oct 21, 2010	Friday Oct 22, 2010
Vacation Pay	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Sick Pay	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Comp Time Taken	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:	0		0	0	0	0	0	0	0
Total Units:		0	0	0	0	0	0	0	0

Fig. 5

- Key in the hours of leave you took on this day (Fig. 6). Hours must be entered in 15 minute increments.

Earning: Vacation Pay
Date: Oct 18, 2010
Hours:

Fig. 6

- Click the button to save your time.
- Your leave report will refresh and display the hours you entered in the appropriate row for the leave type and column for the day you reported the leave.

Leave Report

Title and Number: Chair, Department of Biology -- A00101-00
Department and Number: Dept of Biological Sciences -- 11004
Leave Report Period: Oct 16, 2010 to Oct 31, 2010
Submit By Date: Nov 02, 2010 by 12:00 P.M.

Earning: Vacation Pay
Date: Oct 18, 2010
Hours:

Earning	Total Hours	Total Units	Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010	Tuesday Oct 19, 2010	Wednesday Oct 20, 2010	Thursday Oct 21, 2010	Friday Oct 22, 2010
Vacation Pay	8		Enter Hours	Enter Hours	8	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Sick Pay	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Comp Time Taken	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:	8		0	0	8	0	0	0	0
Total Units:		0	0	0	0	0	0	0	0

Fig. 7

Copying Leave Hours to Other Days

You may have periods of time where you take off multiple days. In these situations, the online leave report will allow you to enter the first day you took the leave, and then copy that time to other days. The steps below explain how to copy leave hours to other days.

1. Access your leave report using the instructions in the Accessing Your Leave Report section.
2. Follow the steps for **Error! Reference source not found.**
3. After you have saved your leave, click the button. The following form will be displayed (Fig. 8).

Leave Code: Vacation Pay, Shift 1 ←

Date and leave time to copy: Oct 18, 2010, 8 Hours

Copy from date displayed to end of the leave period:

Include Saturdays:

Include Sundays:

Copy by date:

Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010	Tuesday Oct 19, 2010	Wednesday Oct 20, 2010	Thursday Oct 21, 2010	Friday Oct 22, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday Oct 23, 2010	Sunday Oct 24, 2010	Monday Oct 25, 2010	Tuesday Oct 26, 2010	Wednesday Oct 27, 2010	Thursday Oct 28, 2010	Friday Oct 29, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday Oct 30, 2010	Sunday Oct 31, 2010					
<input type="checkbox"/>	<input type="checkbox"/>					

Fig. 8

4. This form will allow you to select the days to which you wish to copy the selected leave. At the top of the form, in the **Leave Code** field, you will see the type of leave you have selected

(Vacation Pay in Fig. 8). The **Date and Leave Time to Copy** field will display the day and hours from which you are copying.

- To copy your leave, click the checkboxes for the days you wish to copy your leave. You also have the option at the top of the form to copy your leave from the selected date to every day remaining in the pay period. You may also select to include leave time for Saturdays or Sundays. In Fig. 9, the employee is going to copy the vacation leave from Monday, October 18 to the remainder of that week (Tuesday, October 19 thru Friday, October 22).

Leave Code: Vacation Pay, Shift 1
 Date and leave time to copy: Oct 18, 2010, 8 Hours
 Copy from date displayed to end of the leave period:
 Include Saturdays:
 Include Sundays:
 Copy by date:

Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010	Tuesday Oct 19, 2010	Wednesday Oct 20, 2010	Thursday Oct 21, 2010	Friday Oct 22, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Saturday Oct 23, 2010	Sunday Oct 24, 2010	Monday Oct 25, 2010	Tuesday Oct 26, 2010	Wednesday Oct 27, 2010	Thursday Oct 28, 2010	Friday Oct 29, 2010
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Saturday Oct 30, 2010	Sunday Oct 31, 2010					
<input type="checkbox"/>	<input type="checkbox"/>					

Fig. 9

- After you have selected the days to which to copy your leave, click the button again. Your leave will be copied. The following confirmation will be displayed (Fig. 10).

Your hours have been copied successfully.

Fig. 10

- Click the button to return to your pay period leave report. You should now see the leave you copied on your leave report (Fig. 11).

Select the link under a date to enter hours or days. Select Next or Previous to navigate through the dates within the period.

Leave Report

Title and Number: Chair, Department of Biology -- A00101-00
Department and Number: Dept of Biological Sciences -- 11004
Leave Report Period: Oct 16, 2010 to Oct 31, 2010
Submit By Date: Nov 02, 2010 by 12:00 P.M.

Earning: Vacation Pay
Date: Oct 18, 2010
Hours:

Earning	Total Hours	Total Units	Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010	Tuesday Oct 19, 2010	Wednesday Oct 20, 2010	Thursday Oct 21, 2010	Friday Oct 22, 2010
Vacation Pay	40		Enter Hours	Enter Hours		8	8	8	8
Sick Pay	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Comp Time Taken	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:	40		0	0	0	8	8	8	8
Total Units:		0	0	0	0	0	0	0	0

Fig. 11

Adding Comments to Your Leave Report

Your leave report has a comments section that allows you and your supervisor to add notes to the report. You may add comments to your leave report if you need to include a note to your supervisor. Additionally, if your supervisor returns a leave report to you for correction, you should check the comments section for notes on what you need to correct. Follow this procedure to view or update the comments on your timesheet.

1. Access your leave report using the instructions in the Accessing Your Leave Report section.
2. At the bottom of your leave report, look for a block of navigation buttons like the ones in Fig. 12.

Leave Report

Title and Number: Chair, Department of Biology -- A00101-00
Department and Number: Dept of Biological Sciences -- 11004
Leave Report Period: Oct 16, 2010 to Oct 31, 2010
Submit By Date: Nov 02, 2010 by 12:00 P.M.

Earning: Vacation Pay
Date: Oct 18, 2010
Hours:

Earning	Total Hours	Total Units	Saturday Oct 16, 2010	Sunday Oct 17, 2010	Monday Oct 18, 2010	Tuesday Oct 19, 2010	Wednesday Oct 20, 2010	Thursday Oct 21, 2010	Friday Oct 22, 2010
Vacation Pay	40		Enter Hours	Enter Hours		8	8	8	8
Sick Pay	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Comp Time Taken	0		Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours	Enter Hours
Total Hours:	40		0	0	0	8	8	8	8
Total Units:		0	0	0	0	0	0	0	0

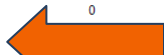
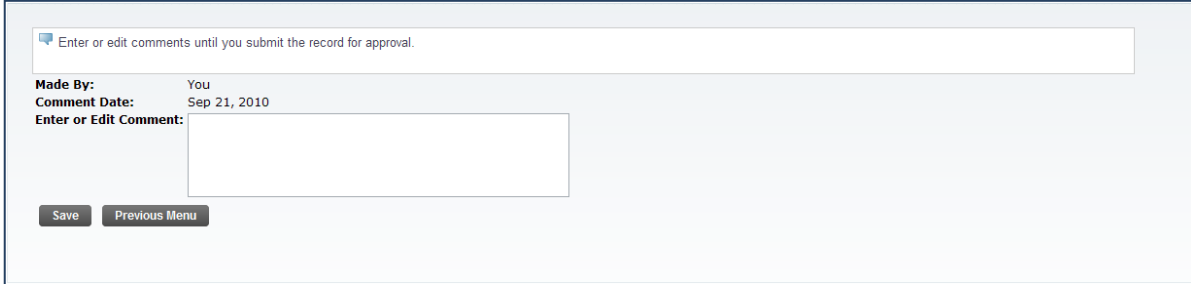


Fig. 12

3. Click the **Comments** button.
4. The Comments section of your leave report will load (Fig. 13).



Enter or edit comments until you submit the record for approval.

Made By: You
Comment Date: Sep 21, 2010
Enter or Edit Comment:

Save Previous Menu

Fig. 13

5. Add your comments in the **Enter or Edit Comment** field, and then click the **Save** button.
6. After you have completed editing or viewing the comments on your leave report, click the **Previous Menu** button to return to your leave report.

Submitting Your Leave Report

At the end of the pay period you will need to submit your leave report to your supervisor for approval. This must be done in advance of the leave report submission deadline for the pay period. This deadline is displayed at the top of each pay period's leave report. Follow these steps to submit your leave report for approval.

1. Access your leave report using the instructions in the Accessing Your Leave Report section.
2. Review your time to ensure that it is accurate.
3. If your time is correct, and you are ready to submit your leave report, click the **Submit for Approval** button.
4. You will receive the confirmation message in Fig. 14.

⚠ Your leave report was submitted successfully.

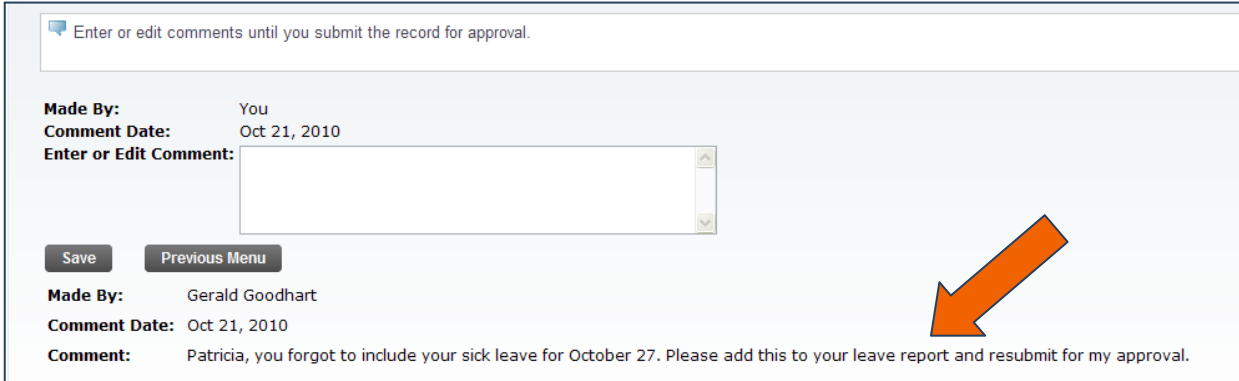
Fig. 14

5. Additionally, if you look at the bottom of your leave report, you will see your name and a date stamp in the **Submitted for Approval By** field. Your supervisor's name will also appear in the **Waiting for Approval From** field. Now that your leave report has been submitted, you may exit the leave report.

Correcting a Submitted Leave Report

Your supervisor will review your leave report after you submit it. If any corrections need to be made, your supervisor will return the leave report to you, and notify you that you need to make corrections. The steps below will guide you in correcting a leave report that has been returned.

1. Access your leave report using the instructions in the Accessing Your Leave Report section.
2. Click the **Comments** button to view notes from your supervisor regarding the corrections that need to be made (Fig. 15).



Enter or edit comments until you submit the record for approval.

Made By: You
Comment Date: Oct 21, 2010
Enter or Edit Comment:

Save **Previous Menu**

Made By: Gerald Goodhart
Comment Date: Oct 21, 2010
Comment: Patricia, you forgot to include your sick leave for October 27. Please add this to your leave report and resubmit for my approval.

Fig. 15

3. Click the **Leave Report** button to exit the comments page and return to your leave report.
4. Make the corrections to your leave report the same way you entered the leave time originally.
5. Once you have completed your corrections, follow the steps for Submitting Your Leave Report.

References

Should you encounter difficulty in completing your online leave report, contact one of the following individuals for assistance.

<u>If type of problem occurs</u>	<u>Contact</u>
You cannot log onto mySam	Information Resources (936) 294-1950 helpdesk@shsu.edu
mySam displays an error stating you have no leave report	Payroll (936) 294-1094 cml018@shsu.edu
Leave report displays incorrect supervisor	Payroll (936) 294-3248 pmm006@shsu.edu
Problems completing leave report	Payroll (936) 294-3248 pmm006@shsu.edu

Revisions

Version	Date	Author	Notes
1.0	12/08/10	Elizabeth Scott	Applied standards and made minor corrections
2.0	01/04/11	Banner PM	Minor formatting modifications
3.0	07/21/11	Karyl Horn	Corrected duplications in document.
5.0	08/09/11	Phyllis Highland	Inserting missing pages in document
5.0	10/25/11	Phyllis Highland	Correcting contact information for Information Resources