

# Salaried Staff Leave Tracking Supervisor Manual

As of August 18, 2009

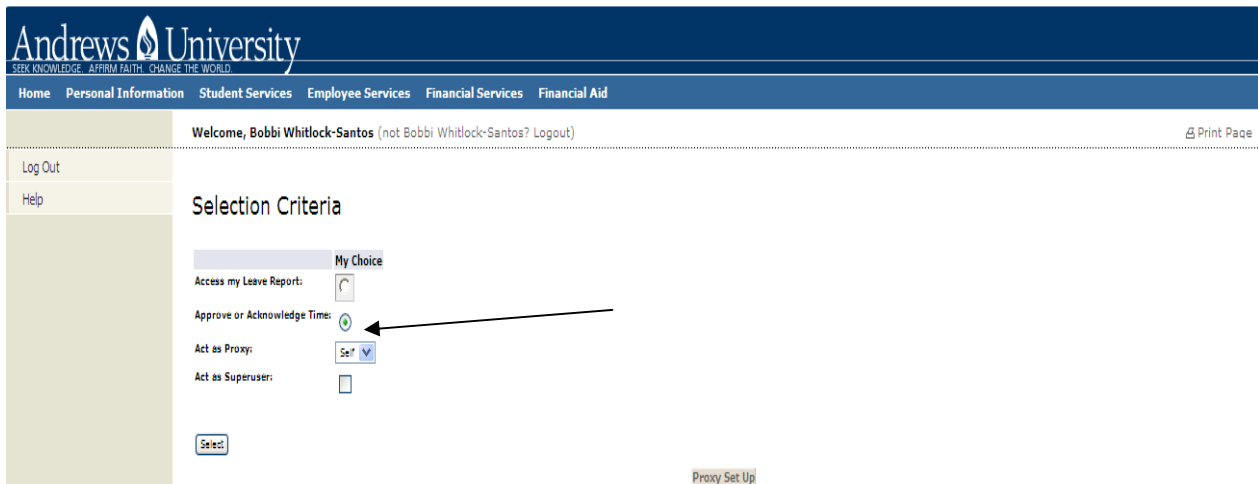
Beginning May 1, 2009, Andrews University began tracking the vacation time of salaried staff. Time is accrued through the payroll process, based on years of service, according to the official leave policy. Leave taken is reported outside of the payroll process via leave reports, which cover a monthly period. Leave reports are available for entry on the first day of the month being reported, and they must be submitted for approval at least five days before the end of the month.

As the supervisor of at least one salaried staff member, you will be responsible for approving the leave reports submitted on a monthly basis. Once your supervisee submits their leave report, you will have until the end of the month to approve it. While some employees may submit their leave reports early in the month, we recommend waiting until their submission deadline has passed to approve the report. You may make changes to a leave report once submitted to you for approval, but no changes can be made once approved. **Please note that a leave report should be submitted and approved, even if zero (0) days were taken during the month.**

Leave report approvals may be accessed via the Vault, or directly by clicking on the following link:  
[www.andrews.edu/go/myleavereport](http://www.andrews.edu/go/myleavereport)

Please follow the instructions below to approve your supervisees' leave reports or set up a proxy.

## Approving Leave Reports:



The screenshot shows the Andrews University web portal interface. At the top, the university logo and tagline "SEEK KNOWLEDGE. AFFIRM FAITH. CHANGE THE WORLD." are visible. Below the logo is a navigation menu with links for Home, Personal Information, Student Services, Employee Services, Financial Services, and Financial Aid. The user is logged in as Bobbi Whitlock-Santos, with a "Logout" link. The main content area is titled "Selection Criteria" and contains a form with the following fields:

- Access my Leave Report:** A radio button labeled "My Choice" is selected.
- Approve or Acknowledge Time:** A radio button with a green circle icon is selected. An arrow points to this field.
- Act as Proxy:** A dropdown menu with "Self" selected.
- Act as Superuser:** An unchecked checkbox.

At the bottom of the form is a "Select" button. In the bottom right corner of the page, there is a "Proxy Set Up" link.

**STEP 1:** Select "Approve or Acknowledge Time," verify that "Self" is selected in the "Act as Proxy" list, and then click on the "Select" button. If someone is acting as a proxy for you, they would want to choose your name from the "Act as Proxy" drop down list.

If you are also a salaried staff member, this is the same screen where you would select “Access my Leave Report”. Supervisors may be unable to view this select screen/approve leave reports until at least one of their supervisees have started a leave report.

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## Leave Report

Department and Description	My Choice	Leave Period
9, 5150, ITS-ADMINISTRATIVE SYSTEMS	<input checked="" type="radio"/>	ML Apr 01, 2009 to Apr 30, 2009 ML Mar 01, 2009 to Mar 31, 2009 ML Apr 01, 2009 to Apr 30, 2009 ML May 01, 2009 to May 31, 2009

Sort Order

Sort employees' records by Status then by Name:

Sort employees' records by Name:

Select

**STEP 2:** The system will display the list of departments in which you have a supervisee that you are responsible for approving leave reports. Select the desired department and leave report period, choose the order by which you would prefer the leave reports to be sorted, and then click the “Select” button.

Note that you will only be able to approve leave reports for one department and one leave period at a time. If you only have one reporting department, it will be pre-selected for you.

Sorting by status and then by name will sort by the status of the leave report, as explained below. We recommend using this sort order to help highlight the action you must take for each report.

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**COA:** 9, Andrews University Chart  
**Department:** 5150, ITS- ADMINISTRATIVE SYSTEMS  
**Leave Period:** May 01, 2009 to May 31, 2009  
**Act as Proxy:** Not Applicable  
**Leave Period Leave Entry Status:** Open until May 26, 2009, 11:59 P.M.

Select New Department Select All, Approve or FYI Reset Save

Pending									
ID	Name and Position	Required Action	Total Days	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Other Information
000133064	Jennifer Kate Janssen S51507 - 00	Approve	6.00	.00	.00		<input type="checkbox"/>	<input type="checkbox"/>	<a href="#">Change Leave Record</a> <a href="#">Leave Balance</a>

In Progress						
ID	Name and Position	Total Days	Total Hours	Total Units	Other Information	
000002496	Marvin Earl Budd S51503 - 00		.00	.00	.00	<a href="#">Leave Balance</a>

Not Started		
ID	Name and Position	Other Information
000010234	Bradley John Christensen S51501 - 00	
000067099	Todd Lee Freeman S51506 - 00	
000002722	Ronald Alan Neumann S51508 - 00	
000067127	Robert James Steele S51509 - 00	
000022664	Kenneth Lynn Zehm S51502 - 00	

**Pay Event Transactions**

Action required by all approvers: 1  
 Time or Leave Transactions Approved or FYI: 0  
 Time or Leave Transactions Awaiting Approval or FYI: 1  
 Total: 2

**STEP 3:** The webpage will display the leave report status of all of the employees under your direct supervision. Leave report statuses are as follows:

- Not Started—the leave report has never been viewed/opened
- In Progress—the leave report has been viewed/started, but not submitted for approval
- Pending—the leave report has been submitted for approval, but has not yet been approved
- Completed—the leave report has been approved and is final; leave taken has been recorded

**Please note that salaried staff members who do not report directly to you, but are in the department you have selected, will appear on the list as long as their leave report status is Not Started. Once their leave report is started, they will only appear on the list of their direct supervisor.**

As a reminder, the deadline for that month’s leave report is found next to “Leave Period Leave Entry Status”.

If, after the deadline, a leave report's status is still Not Started and you know that your supervisee took time during the month, please contact payroll for assistance.

If, after the deadline, there are leave reports with a status of In Progress, you must complete **STEP 4** for each of them. Proceed to **STEP 4** by clicking on the link containing their name.

Leave reports with a status of Pending are ready for your approval. While it is possible to approve pending leave reports directly from this screen, it is encouraged that you review the details of the leave report prior to approving it. To view a leave report for a particular supervisee, click on the link containing their name. Proceed to **STEP 5**.

Please note that you should never check the "Return for Correction" box on the screen above. This functionality is not applicable to our supervising structure.

The screenshot displays the Andrews University leave tracking system. At the top, there is a navigation menu with options like Home, Personal Information, Student Services, Employee Services, WebTailor Administration, Financial Services, and Financial Aid. The main content area shows a welcome message for Bradley Christensen and a message: "To select the next or previous employee (if applicable), click either Next or Previous." Below this, there is a section for Employee ID and Name, Title, Department and Description, and Transaction Status. The Transaction Status is "In Progress". There are buttons for "Previous Menu", "Submit", and "Next". A black arrow points to the "Submit" button. Below this, there is a "Leave Report" section with a table showing Earnings Total, Days, and Units for each day from May 01 to May 21, 2009. The table shows 0 days and 0 units for all days. Below the table, there is a "Leave Balances as of Apr 07, 2009" table with columns for Type of Leave, Hours or Days, Banked, Date Available, Available Beginning Balance, Earned, Taken, and Available Balance. The table shows 0 days banked, a date available of Apr 16, 1990, and an available beginning balance of -3.83. Below the table, there is a "Routing Queue" section with a table showing Name, Action and Date, and In the Queue. The table shows Marvin Earl Budd and Bradley John Christensen. A black arrow points to the "Submit" button in the routing queue.

**STEP 4:** When an employee starts but does not submit their leave report by the submission deadline, it is necessary for the supervisor to submit the leave report on their behalf. After clicking on the name link for an In Progress report, the above screen appears. You must click on the "Submit" button; this immediately brings up the screen for **STEP 5**.

The "Submit" button is only available once the employees' submission deadline has passed.

The screenshot displays the Andrews University Salaried Staff Leave Tracking system. At the top, the user is logged in as Bradley Christensen. A warning message indicates a "Possible Insufficient Leave Balance for Salaried Vacation Time." Below this, the employee's details are shown: Employee ID and Name: 000002498 Manin Earl Sudd, Title: 00100000 Database Administrator, Department and Description: 01100 ITS-INDUSTRIAL SYSTEMS, Transaction Status: Pending. Navigation buttons include Previous Menu, Approve, Change Record, Add Comment, and Next. A calendar view for April 2009 shows the leave report with columns for Earnings, Total Days, Total Units, and Salaried Vacation Time. Below the calendar is a table of Leave Balances as of Apr 24, 2009, with columns for Type of Leave, Hours or Days, Banked, Date Available, Available Beginning Balance, Earned, Taken, and Available Balance. The table shows 0 banked days, a date available of Apr 16, 2009, and an available beginning balance of -3.02. Comments and error messages are also visible.

**STEP 5 (a):** The leave report will display the total number of vacation days requested by your supervisee, as well as the dates on which vacation time was taken (you may need to use the horizontal scroll bar to view the entire month).

Here you can also view leave balance information. Please keep in mind that the leave taken in the report you are viewing will not appear in the “Taken” column until you approve the leave report.

Finally, you can view routing queue information. This will be most helpful if you are the supervisor of an employee with more than one supervisor or when a proxy might have approved a leave report on your behalf.

If corrections need to be made, please click the “Change Record” button and proceed to **STEP 5 (b)**.

Once you are satisfied with the leave report, click on the “Approve” button. **Be certain, as no changes to the leave report may be made once approved.** It is for this reason that we recommend that you wait until the final five days of the month to approve leave reports, even if submitted early by your supervisee.

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

**No hours entered.**

**Leave Report**

Name: Jennifer Kate Janssen  
Title and Number: Banner Support Specialist -- S51507-00  
Department and Number: ITS-ADMINISTRATIVE SYSTEMS -- 5150  
Leave Report Period: Apr 01, 2009 to Apr 30, 2009  
Submit By Date: Apr 07, 2009 by 12:00 P.M.

Earning	Total Days	Total Units	Wednesday Apr 01, 2009	Thursday Apr 02, 2009	Friday Apr 03, 2009	Saturday Apr 04, 2009	Sunday Apr 05, 2009	Monday Apr 06, 2009	Tuesday Apr 07, 2009
Salaried Vacation Time	1		<u>1</u>	<a href="#">Enter Days</a>	<a href="#">Enter Days</a>	<a href="#">Enter Days</a>	<a href="#">Enter Days</a>	<a href="#">Enter Days</a>	<a href="#">Enter Days</a>
Total Days:	1		1	0	0	0	0	0	0
Total Units:		0	0	0	0	0	0	0	0

Submitted for Approval By: Bobbi Jo Whitlock-Santos on Apr 02, 2009  
 Approved By:  
 Waiting for Approval From: Bradley John Christensen

**STEP 5 (b):** To make changes to a supervisee’s leave report, please following the instruction found in the **Salaried Staff Leave Tracking—Employee Manual, STEP 3 (a-c)**.

Changes may be necessary because a supervisee took vacation and started their leave report, but did not complete it by the deadline. Changes might be needed because something did in fact change between the time that the supervisee submitted the leave report and the time that you are going to approve it. Changes might also be needed if the employee missed the deadline entirely.

Please do not approve until you have corrected time for the entire month, not just the days displayed.

Once changes are complete, you may approve directly from this screen by clicking on the “Approve” button, or click on the “Previous Menu” button to return to the screen shown in **STEP 5 (a)**.

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To select the next or previous employee (if applicable), click either **Next** or **Previous**.

**Time transaction successfully approved.**

**Possible Insufficient Leave Balance for Salaried Vacation Time.**

Employee ID and Name: 000133064 Jennifer Kate Jansen Department and Description: 9 5150 ITS-ADMINISTRATIVE SYSTEMS  
Title: SS1507-00 Banner Support Specialist Transaction Status: Completed

[Previous Menu](#) [Next](#)

[Leave Balances](#) | [Leave Updated](#) | [Routing Queue](#)

**Leave Report**

Earnings	Total Days	Total Units	Friday, May 01, 2009	Saturday, May 02, 2009	Sunday, May 03, 2009	Monday, May 04, 2009	Tuesday, May 05, 2009	Wednesday, May 06, 2009	Thursday, May 07, 2009	Friday, May 08, 2009	Saturday, May 09, 2009	Sunday, May 10, 2009	Monday, May 11, 2009	Tuesday, May 12, 2009	Wednesday, May 13, 2009	Thursday, May 14, 2009	Friday, May 15, 2009	Saturday, May 16, 2009	Sunday, May 17, 2009	Monday, May 18, 2009	Tuesday, May 19, 2009	Wednesday, May 20, 2009	Thursday, May 21, 2009
Salaried Vacation Time	6									1		1	1	1	1	1							
Total Days:	6									1		1	1	1	1	1							
Total Units:	0																						

**Leave Updated for Salaried Vacation Time**

Leave Code	Posted Days
Salaried Vacation Time	6.00
<b>Total:</b>	<b>6.00</b>

**Leave Balances as of Apr 03, 2009**

Type of Leave	Hours or Days	Banked	Date Available	Available Beginning Balance	Earned	Taken	Available Balance
Salaried Vacation Time	Days	0	Apr 30, 2007	10.83	.23	6	5.06

**STEP 6:** Upon approving a leave report, you should receive a message that the “Time transaction was successfully approved.”

If your supervisee requested more vacation time than they have accrued to date, a warning message of “Possible Insufficient Leave Balance for Salaried Vacation Time” will be displayed. Salaried staff members are allowed to have up to two weeks negative balance, but a negative balance at end of employment will be re-couped in the last two paychecks.

Once **STEP 6** is completed, you may navigate to the next supervisee’s leave report by clicking the “Next” button, or return to the screen shown in **STEP 3** by clicking the “Previous Menu” button.

Leave reports must be approved by the last calendar day of the month, in order to ensure that Finance can arrive at an accurate leave accrual.

If you have not approved leave reports for all of your supervisees by four (4) days before the end of the month, you will begin receiving a daily reminder, via email, until all leave reports have been approved.

If vacation time taken comes to your attention after you have approved the leave report, please add the additional time to the next months vacation days taken. If this situation arises, you can use the “Add comment” button (see screen from **STEP 5**) to put an explanation with the following month’s leave report. For instance, your supervisee forgot to report 2 days in August, and you’ve already approved their leave report for August. Add two days to whatever time reported in September, and add a

comment to September’s leave report with an explanation. You, as the supervisor, can add the additional time and comment after the submission deadline, before you approve, or you may direct your supervisee to do so before they submit the leave report for your approval. **HOWEVER, if the unreported time is in the month of APRIL, please contact payroll immediately.**

Completed leave reports can be viewed at any time by clicking on the name link from the screen shown in **STEP 3**.

### Setting up a Proxy:

The screenshot shows the Andrews University website interface. At the top, there is a navigation bar with links for Home, Personal Information, Student Services, Employee Services, Financial Services, and Financial Aid. Below this, a user is logged in as Bobbi Whitlock-Santos. The main content area is titled 'Selection Criteria' and includes several options: 'Access my Leave Report' (set to 'My Choice'), 'Approve or Acknowledge Time' (set to a clock icon), 'Act as Proxy' (set to 'Self'), and 'Act as Superuser' (unchecked). A 'Select' button is located at the bottom left of the form. At the bottom right of the page, there is a link labeled 'Proxy Set Up' which is highlighted by a black arrow.

**STEP 1:** Select the link “Proxy Set Up” located at the bottom of the page. The following page does take a little while to load, so please be patient. A loading error may occur if you click twice; if this occurs, page-back and try again.

Proxies can be used temporarily if you will be out of town (but keep in mind that leave reports can be approved from anywhere you have an internet connection), or on a more regular basis if you wish your administrative assistant to approve leave reports on your behalf.

Proxies can only approve leave reports for you. They may not submit your personal leave report on your behalf. **Additionally, you are the ONLY person who can setup your proxies; neither payroll nor any proxy can do this on your behalf. Please plan ahead.**



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Name Add Remove  
Jennifer Kate Janssen, JJANSSEN  ←

Save

[Time Reporting Selection](#)

**STEP 2:** The system will display an alphabetically-sorted (by last name) drop-down list of all current non-student employees. Select the desired name and check the “Add” box. Then click on the “Save” button.

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Name Add Remove  
Jennifer Kate Janssen, JJANSSEN  ←  
Joseph Otu Abara, ABARA

Save

[Time Reporting Selection](#)

**STEP 3:** Once listed as a proxy, an individual can be removed by checking the “Remove” box and then clicking the “Save” button.

You can return to the main menu by clicking on the “Time Reporting Selection” link at the bottom of the page.