Salaried Staff Leave Tracking
Supervisor Manual
As of August 18, 2009

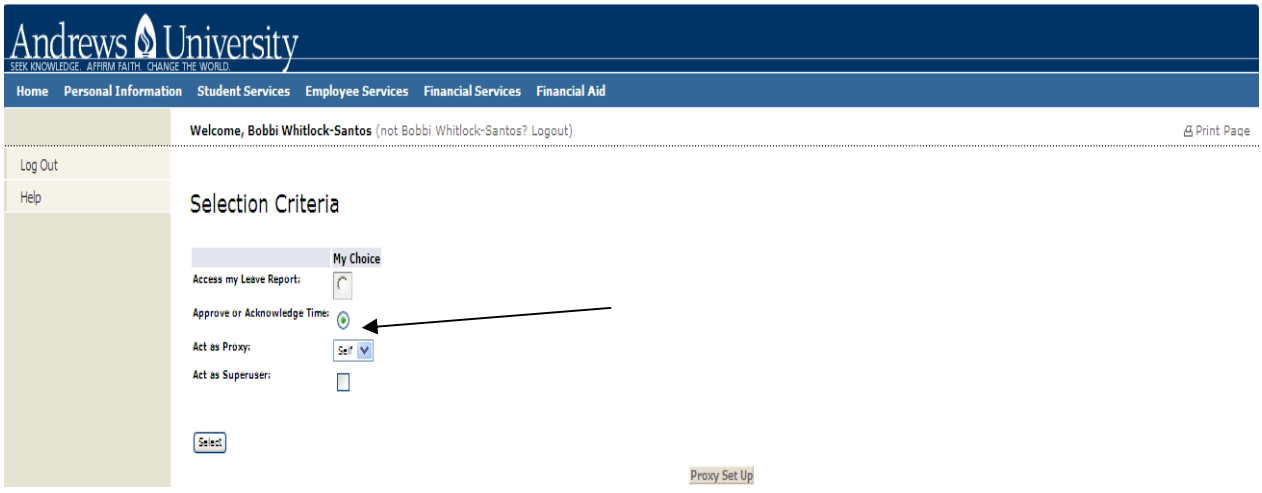
Beginning May 1, 2009, Andrews University began tracking the vacation time of salaried staff. Time is accrued through the payroll process, based on years of service, according to the official leave policy. Leave taken is reported outside of the payroll process via leave reports, which cover a monthly 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

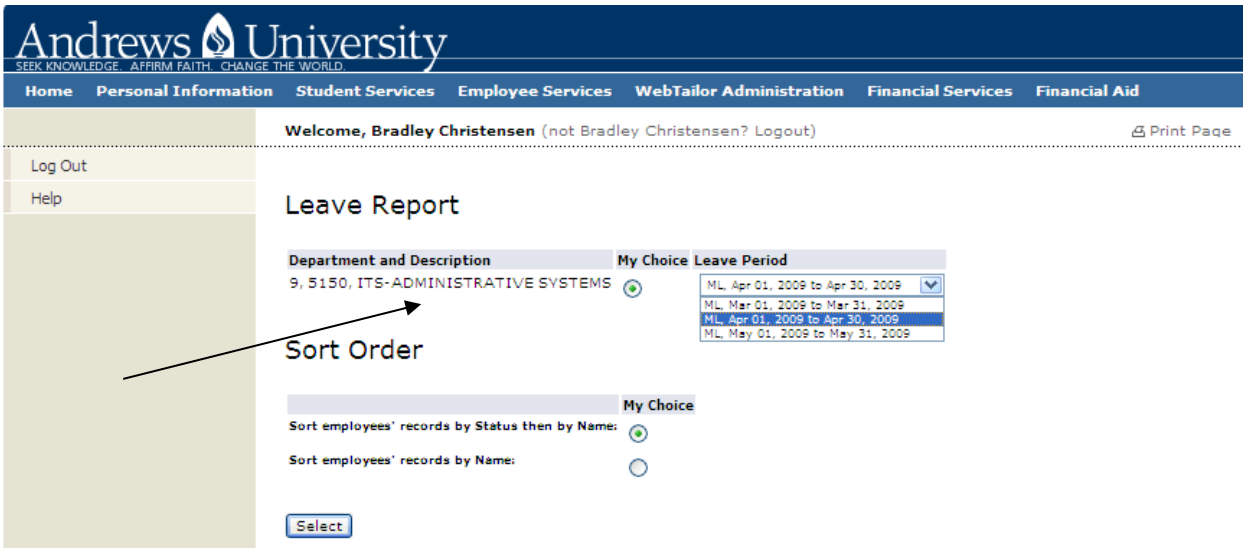
Please follow the instructions below to approve your supervisees' leave reports or set up a proxy.

Approving Leave Reports:



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.

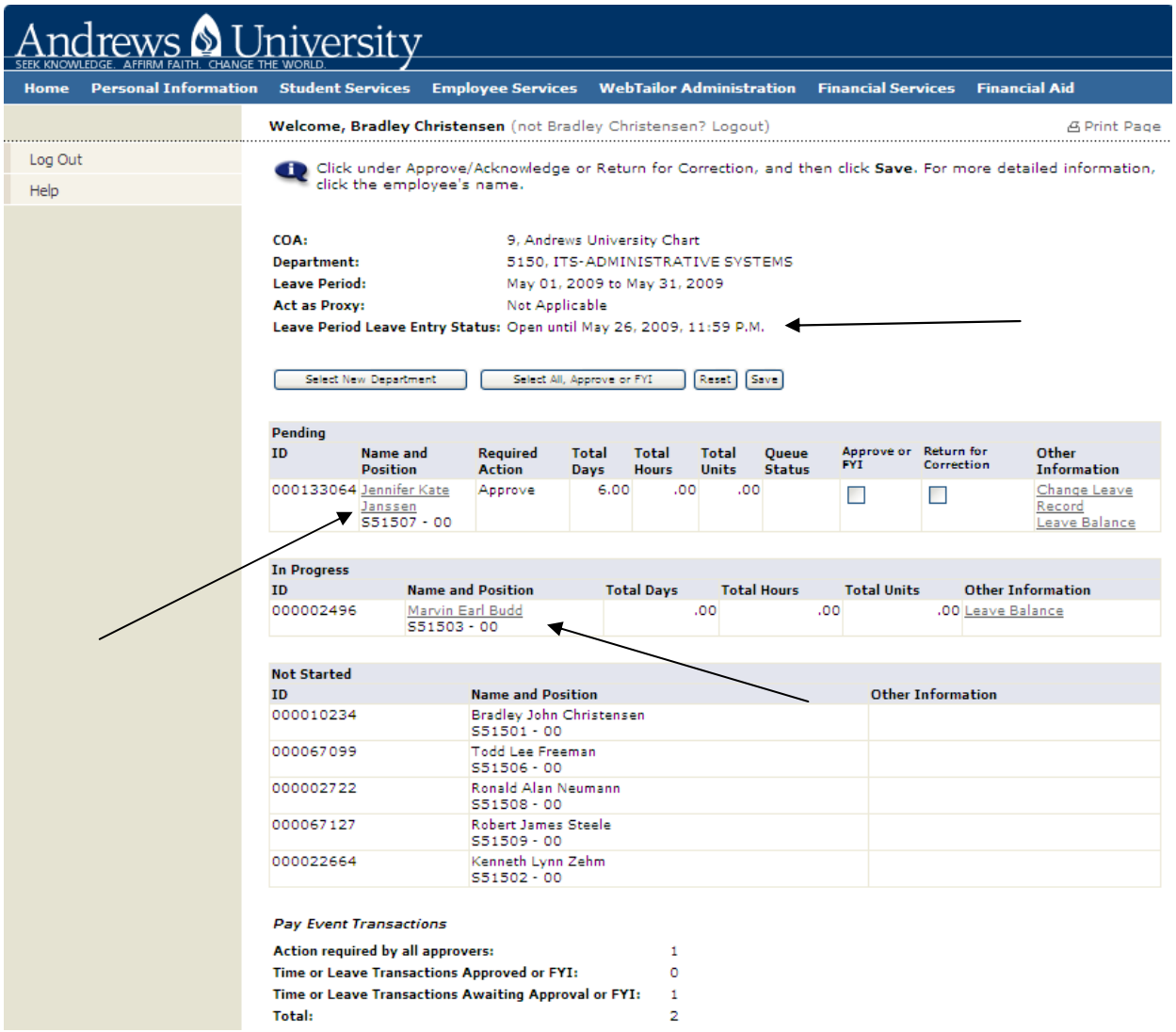
If you are also a salaried staff member, this is the same screen where you would select "Access my Leave Report". *Supervisors may be unable to view this select screen/approve leave reports until at least one of their supervisees have started a leave report.*



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.



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.

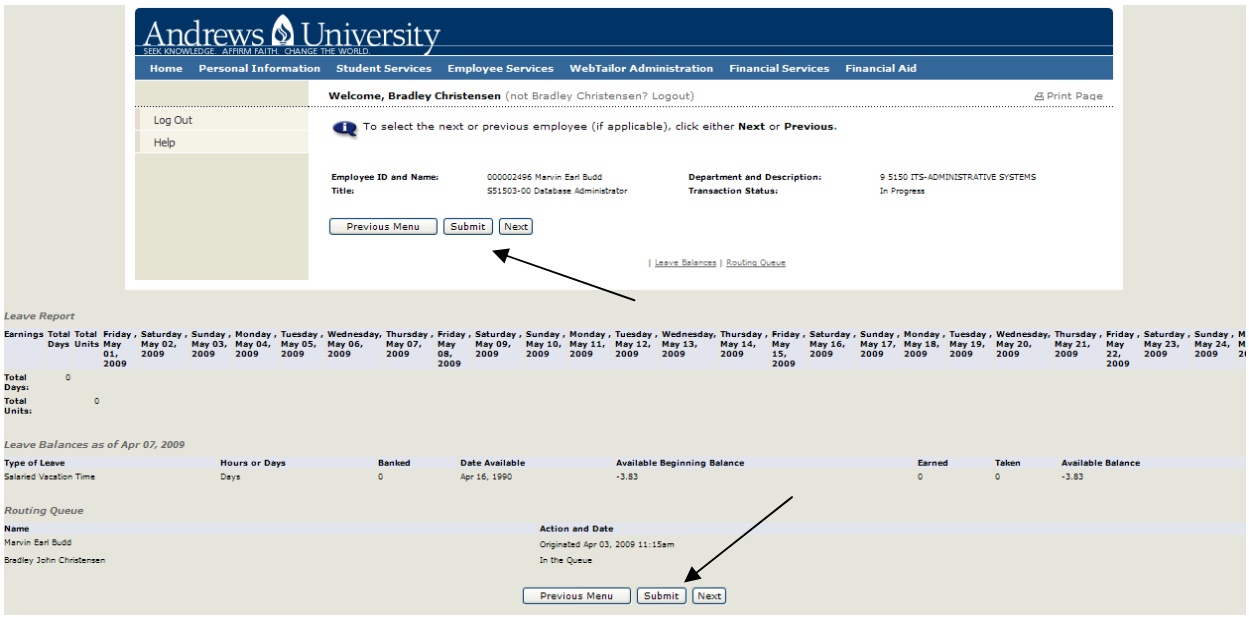
As a reminder, the deadline for that month's leave report is found next to "Leave Period Leave Entry Status".

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.

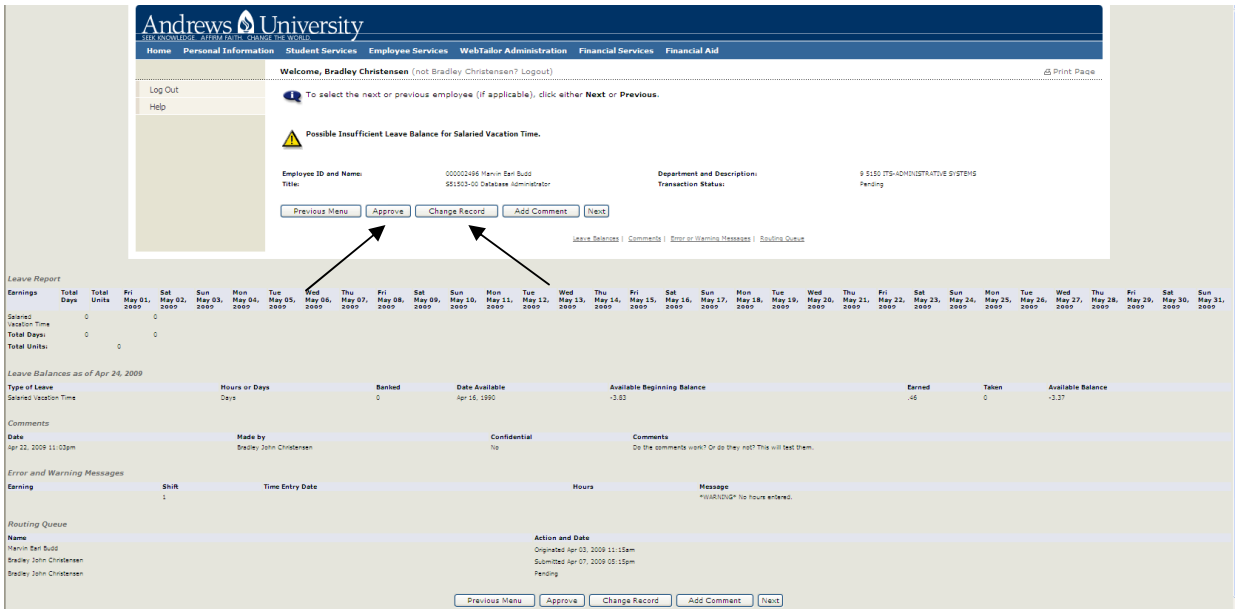
Leave reports with a status of Pending are ready for your approval. While it is possible to approve pending leave reports directly from this screen, it is encouraged that you review the details of the leave report prior to approving it. To view a leave report for a particular supervisee, click on the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



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.



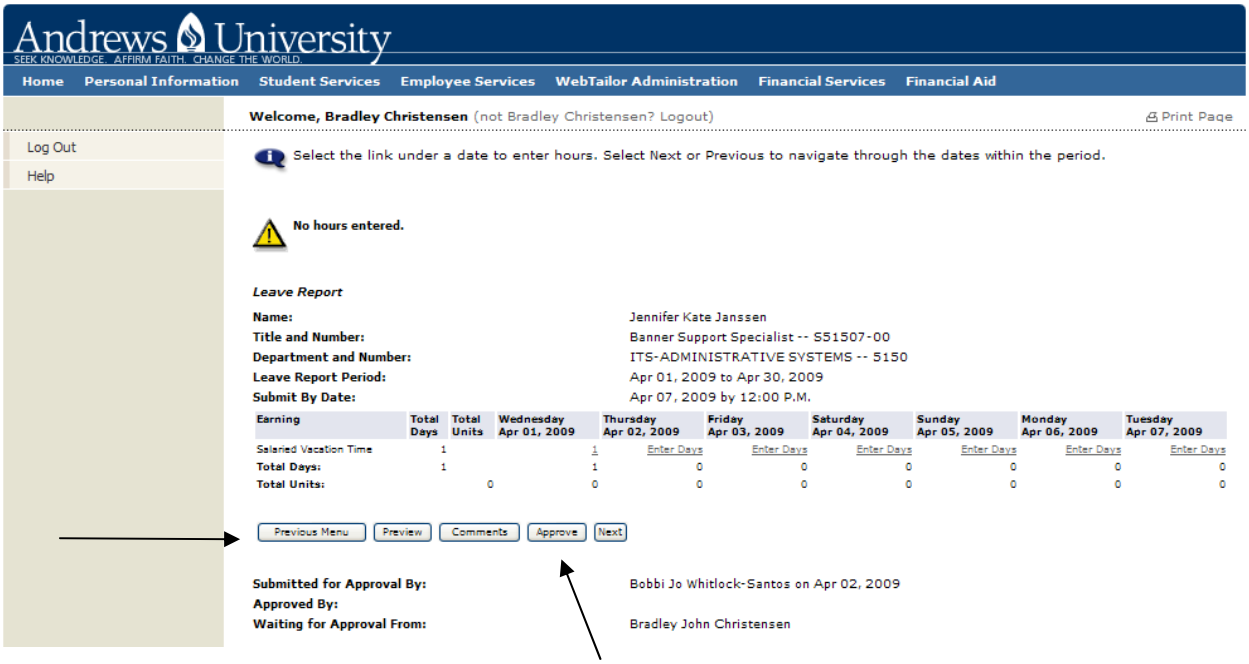
STEP 5 (a): The leave report will display the total number of vacation days requested by your supervisee, as well as the dates on which vacation time was taken (you may need to use the horizontal scroll bar to view the entire month).

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.

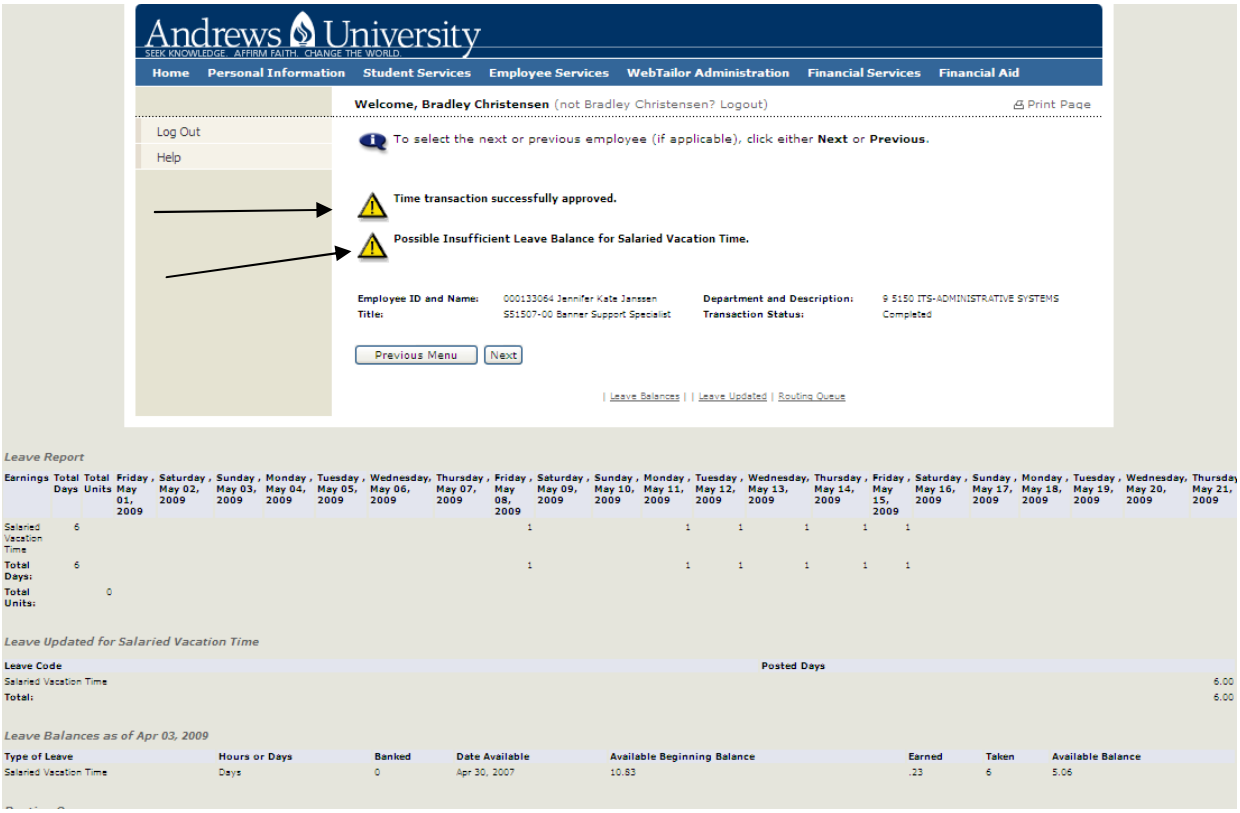


STEP 5 (b): To make changes to a supervisee's leave report, please following the instruction found in the **Salaried Staff Leave Tracking—Employee Manual, STEP 3 (a-c)**.

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)**.



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.

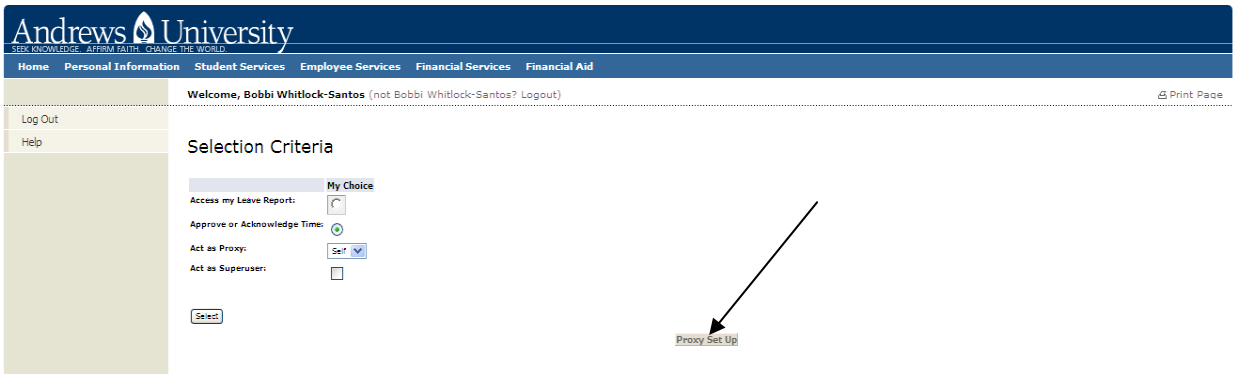
If you have not approved leave reports for all of your supervisees by four (4) days before the end of the month, you will begin receiving a daily reminder, via email, until all leave reports have been approved.

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**.

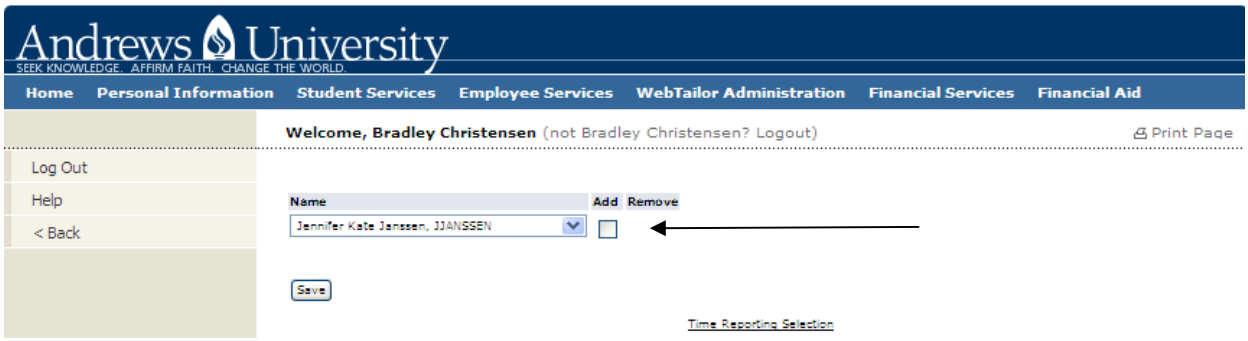
Setting up a Proxy:



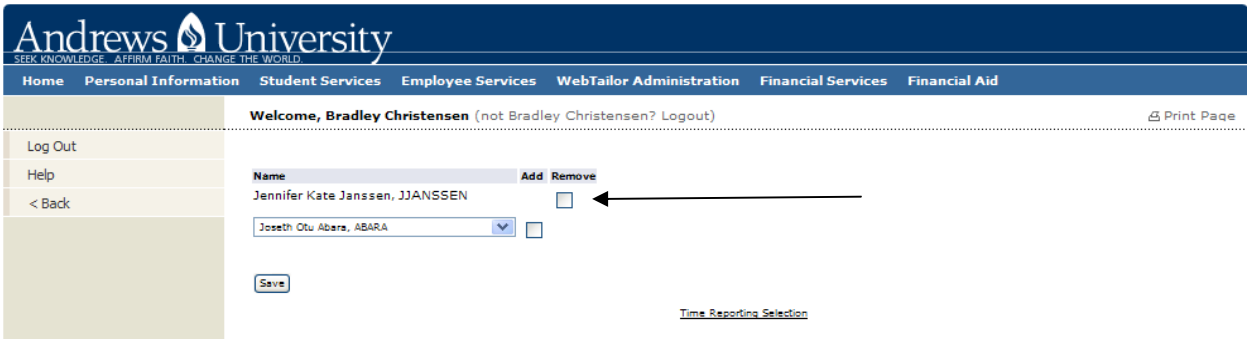
STEP 1: Select the link "Proxy Set Up" located at the bottom of the page. The following page does take a little while to load, so please be patient. A loading error may occur if you click twice; if this occurs, page-back and try again.

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.**



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.



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.