

Approving Leave Request & Reports

Banner 9 Baseline leaves

Requesting and reporting leaves is now a 2-step process through the Banner Self-service pages. This process requires 2 approvals.

Definitions:

Leave request (leave planning) will be used for leaves that require preapproval prior to taking leave. Leave requests can be submitted up to 24 reporting periods in advance.

Note: once a reporting period is open leave requests can no longer be used.

Leave report (submitting leave taken) will be used to record leaves taken during the reporting period. Only one leave form maybe submitted for all leaves (sick, special and vacation) taken during the reporting period.

Note: reporting periods have the same timing as the pay period.

Report period timing:

1. Period open – first day of the reporting period (same as pay periods)
 - a. Example April 1 to April 15
2. Submission date – five days after the period end date
 - a. April 1 – 15 leave reporting period would need to be submitted by April 20th
 - b. Exception March 31 & December 31st 3 days submission to accommodate the accrual roll
3. Approval date – five days after the submission date
 - a. Example April 1 – 15 leave reporting period
 - i. Employees have until the 20th to submit
 - ii. Approvers have until the 25th to approve
 - b. Exception March 31 & December 31st 3 days approval to accommodate the accrual roll
4. Viewable on employee dashboard – 2 years

Approving Leave Request and Reports

UFV is using the leave request functionality to enable preplanning of vacation. Once approved and the employee takes the leave, the employee will submit a leave report for approval. The leave report will then deduct the hours taken from the leave balance.

1. Log onto [Banner Self Service](#).
 - a. Log on email address
 - b. Password network password

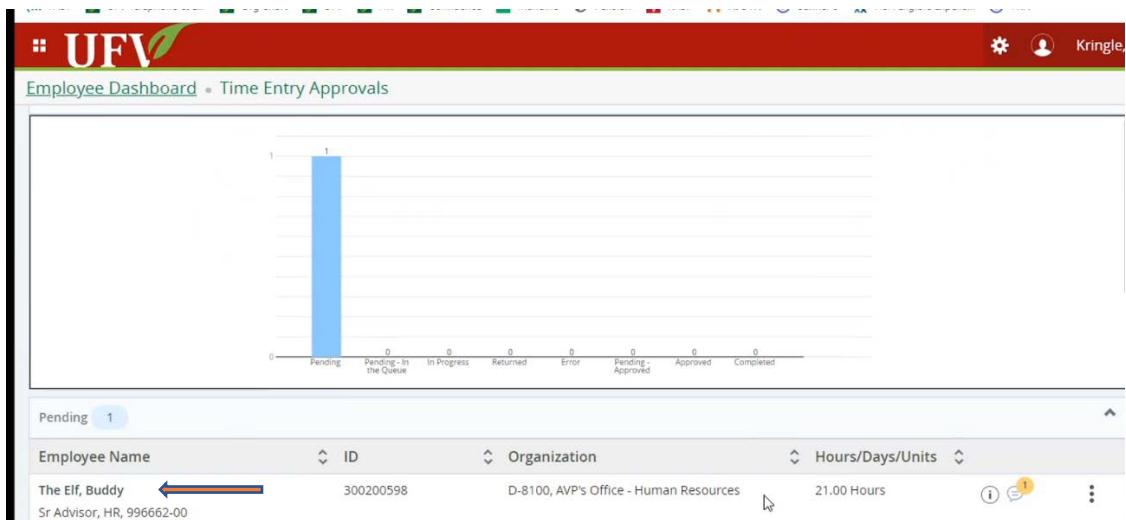
2. The Employee Dashboard will appear.
3. Click the Approve Leave Request link or Approve Leave Report link under the My Activities column.

The screenshot shows the Employee Dashboard interface. On the left, there's a sidebar with sections like Pay Information, Benefits, Taxes, Job Summary, and Employee Summary. On the right, there's a 'My Activities' sidebar with buttons for 'Enter Time', 'Enter Leave Report', 'Approve Time', 'Approve Leave Report' (which has a blue arrow pointing to it), 'Approve Leave Request' (which also has a blue arrow pointing to it), and 'Salary Planner'. The 'Approve Leave Report' and 'Approve Leave Request' buttons are the ones highlighted in the screenshot.

4. The approvals – Timesheet page will appear (leave approvals uses the same system as timesheet).
 - a. Leave report or request will be visible

The screenshot shows the 'Time Entry Approvals' page. At the top, there's a bar chart with a single bar labeled 'Pending' with a value of 1. Below the chart, there's a table with columns for Employee Name, ID, Organization, and Hours/Days/Units. The table shows one row for 'The Elf, Buddy' with ID 300200598, Organization 'D-8100, AVP's Office - Human Resources', and Hours/Days/Units '21.00 Hours'. There are also icons for information and a list next to the table.

5. Click on the employee's name to review the leave request/report to be approved.



Employee Dashboard » Time Entry Approvals

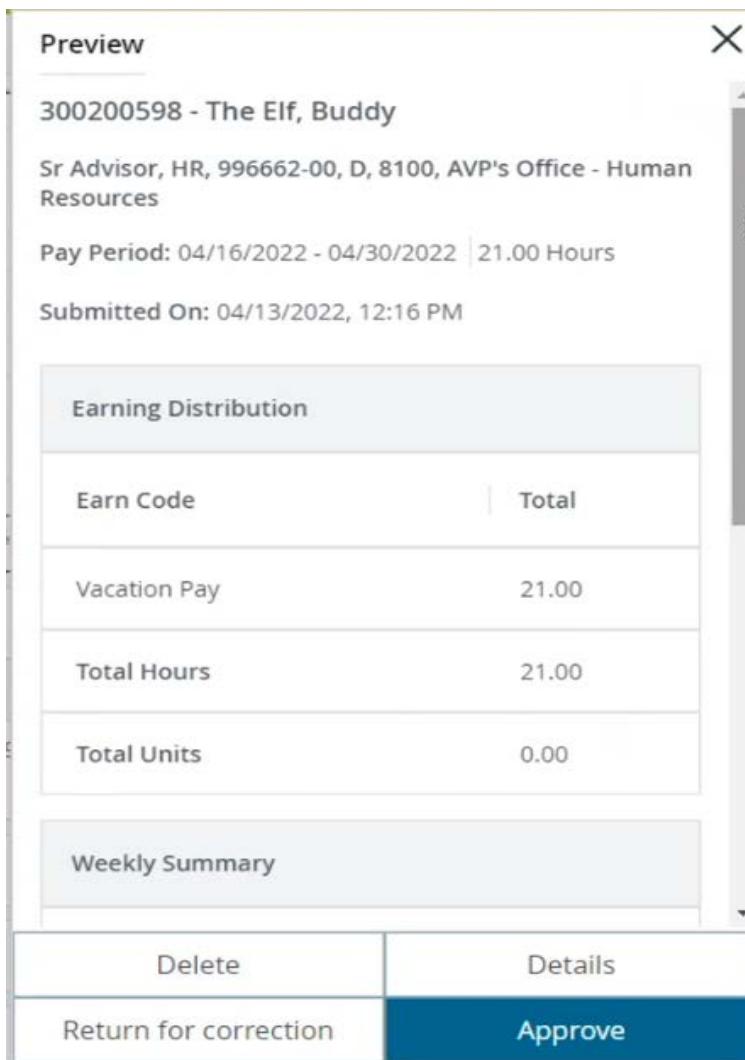
1 Pending

Pending	Pending - In the Queue	In Progress	Returned	Error	Pending - Approved	Approved	Completed
1	0	0	0	0	0	0	0

Pending 1

Employee Name	ID	Organization	Hours/Days/Units
The Elf, Buddy	300200598	D-8100, AVP's Office - Human Resources	21.00 Hours
Sr Advisor, HR, 996662-00			

6. A preview pop-up window will appear. A summary will appear with leave codes taken.



Preview

300200598 - The Elf, Buddy

Sr Advisor, HR, 996662-00, D, 8100, AVP's Office - Human Resources

Pay Period: 04/16/2022 - 04/30/2022 | 21.00 Hours

Submitted On: 04/13/2022, 12:16 PM

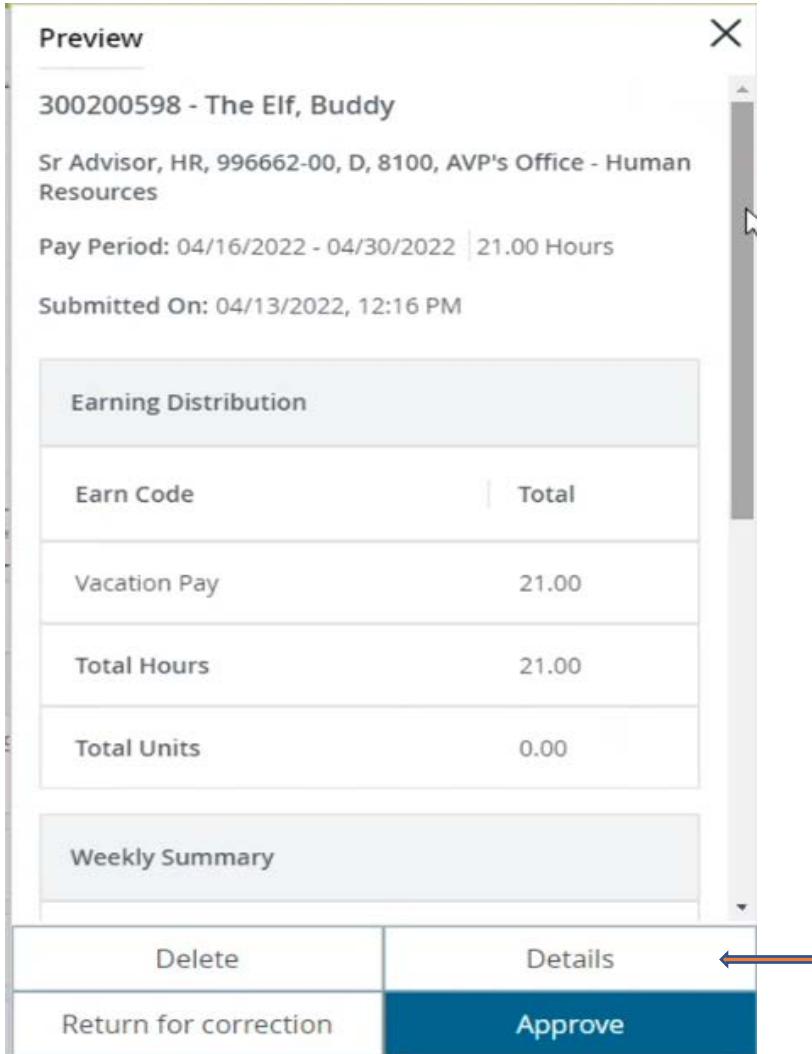
Earning Distribution

Earn Code	Total
Vacation Pay	21.00
Total Hours	21.00
Total Units	0.00

Weekly Summary

Delete	Details
Return for correction	Approve

7. Review the request or report by clicking details



Preview

300200598 - The Elf, Buddy

Sr Advisor, HR, 996662-00, D, 8100, AVP's Office - Human Resources

Pay Period: 04/16/2022 - 04/30/2022 | 21.00 Hours

Submitted On: 04/13/2022, 12:16 PM

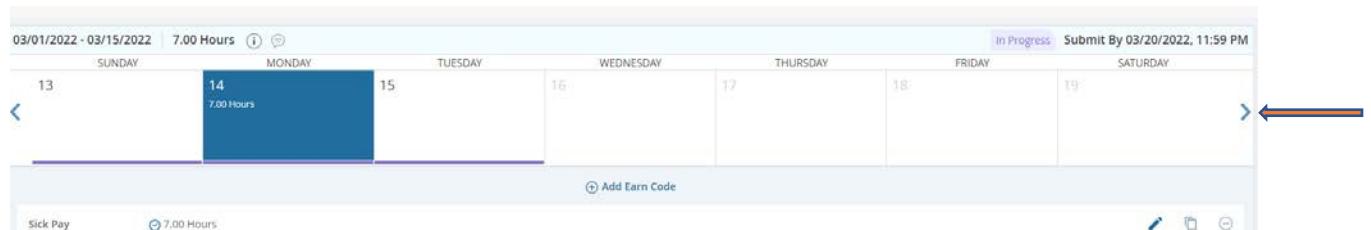
Earning Distribution

Earn Code	Total
Vacation Pay	21.00
Total Hours	21.00
Total Units	0.00

Weekly Summary

Delete	Details
Return for correction	Approve

- a. A calendar will appear with the details of the days requested or taken
- b. You can scroll to see all the entries in the requested period



03/01/2022 - 03/15/2022 | 7.00 Hours ⓘ ⓘ

SUNDAY MONDAY TUESDAY WEDNESDAY THURSDAY FRIDAY SATURDAY

13 14 7.00 Hours 15 16 17 18 19

In Progress Submit By 03/20/2022, 11:59 PM

Add Earn Code

Sick Pay 7.00 Hours

8. To approve click on approve

- a. You may enter a comment

Note: the entire request is either approved or denied

Preview X

300200598 - The Elf, Buddy

Sr Advisor, HR, 996662-00, D, 8100, AVP's Office - Human Resources

Pay Period: 04/16/2022 - 04/30/2022 | 21.00 Hours

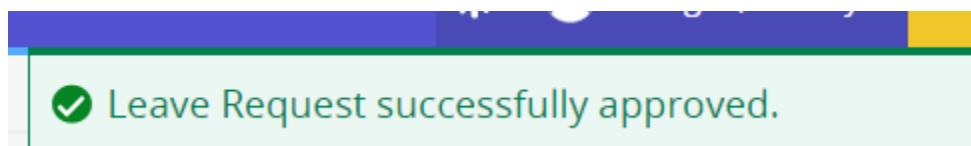
Submitted On: 04/13/2022, 12:16 PM

Earning Distribution	
Earn Code	Total
Vacation Pay	21.00
Total Hours	21.00
Total Units	0.00

Weekly Summary

Delete	Details
Return for correction	Approve ←

9. A confirmation box will appear



10. If you do not approve select return for correction Note: the entire request is either approved or denied

- Click on return for correction

Preview X

300200598 - The Elf, Buddy

Sr Advisor, HR, 996662-00, D, 8100, AVP's Office - Human Resources

Pay Period: 04/16/2022 - 04/30/2022 | 21.00 Hours

Submitted On: 04/13/2022, 12:16 PM

Earning Distribution	
Earn Code	Total
Vacation Pay	21.00
Total Hours	21.00
Total Units	0.00

Weekly Summary

Delete	Details
Return for correction	Approve

b. A comment must be entered to return it for correction

Comment (Optional):

You don't have enough time available. Please remove one vacation day.

1930 characters remaining

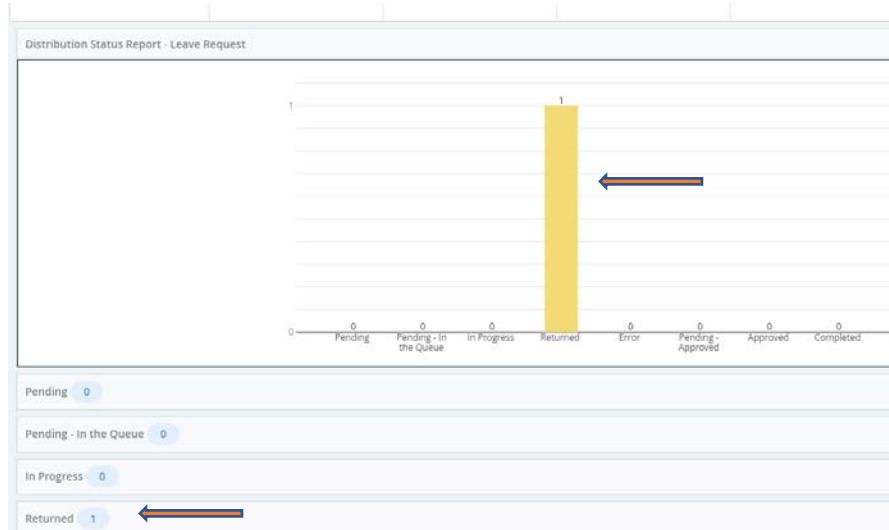
11. The request or report will be returned to the employee for correction.

Note: reports are for days already taken.

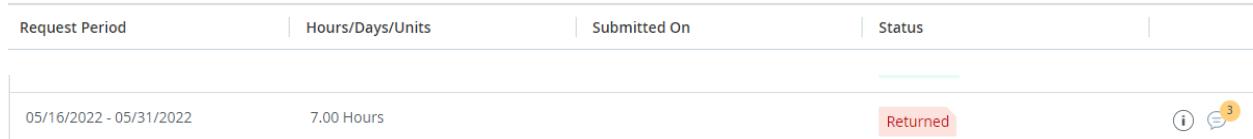
12. The system will return the report or request to the employee for correction. An email will also be sent to the employee notifying them their request / report has been returned for correction.



13. The approver's dashboard will also indicate request / report has been returned in the summary



14. The employee's dashboard will also indicate the request / report has been returned for correction



- The employee will need to make the correction requested then complete steps 3 through 8 for resubmission.