Payroll Services

Banner

Time and Leave

Approving

Manual

Saint Louis University

Office of the Controller
Table of Contents

Chapter 1:  Time Approver Responsibility and General Information........Page  4

Chapter 2:  Banner Self Service Time and Leave Approvals
           Lesson 2-1:  Logging on to Banner Self Service......................Page  6
           Lesson 2-2:  General Information-Time Sheets........................Page  7
           Lesson 2-3:  Approving Biweekly Time Sheets.......................Page 8
           Lesson 2-4:  Approving Monthly Leave Reports.....................Page 19

Chapter 3:  Department Time Entry and Approvals in INB
           Lesson 3-1:  Logging on to my SLU........................................Page 31
           Lesson 3-2:  Department Time Entry Form (PHATIME)..............Page 33
           Lesson 3-3:  Certifying Continued Eligibility for Pay...........Page 39

Chapter 4:  Payroll Services
           Contact List...........................................................................Page 43
Chapter 1: Time Approver Responsibility and General Information

Responsibility:

The electronic Time Approvals capability of the Banner Human Resources System provides a paperless solution for relaying hours worked, leave taken, and certification of continued eligibility for pay (monthly contracted Faculty, Graduate Assistants, Supplemental Pay positions and Housestaff) to Payroll Services. Three methods of reporting will be utilized for the collection of time and attendance data within Banner. Departments utilizing time clocks will continue to do so and are not included in this discussion. The three methods of time and leave reporting are Electronic Biweekly Time Sheets, Electronic Monthly Leave Reports, and Department Time Certification.

The Electronic Biweekly Time Sheet Approvals are applicable to biweekly paid students and staff. Wage and hour regulations require the recording of each time-in and time-out instance of hours worked, and leave taken, on a daily basis. The University requires electronic submission and certification of the time sheet by the employee for subsequent supervisory approval in order to receive pay. To reduce the University’s exposure to risk, and for appropriate pay and accruals, an employee may not be designated as their own time approver. Mandatory Time Approvers are responsible for reviewing each time sheet assigned for their approval for accurate time and leave reporting, and to make certain that time and leave reporting is done in accordance to University Policy.

Electronic Monthly Leave Reports are applicable to all monthly paid salaried staff eligible for vacation and sick leave accruals and other paid leave. The University requires recording of each instance of exception time (vacation, sick, etc.), submission of the leave report, and certification of the leave report. Time Approvers are responsible for making certain their monthly staff employees submit a Leave Report, even if no leave has been taken during the designated period, and that the report is approved. The leave report for any given month is due to be submitted within the first week of the following month.

Department Time Approvers are required to utilize INB (Internet Native Banner) to extract and approve time sheets for specific working groups of employees. Those employees are Faculty, Graduate Assistants, Supplemental Pay positions, and Housestaff. Since the aforementioned employees do not accrue vacation or sick time, the only available exception time to report is unpaid leave, if applicable. By approving these time sheets in INB the Time Approver is certifying the employees continued eligibility for pay.

All Time Approvers are responsible for being familiar with University Policy regarding vacation, sick, bereavement, jury duty, military leave, FMLA, Holiday (and Holiday accruing), and University Closure. Time Approvers are expected to adjust employee time and leave entries to conform to University Leave Policy, or to contact Human Resources or Payroll Services for assistance if unclear about how the policy should be applied.

General Information:

Time Approvers are designated by their Department Head or Business Manager. Before employees can be assigned to the appropriate Time Approver, Human Resource Security Access must be requested for the appropriate Department (Orgn) in Banner. After Time Approvers are setup, and access granted, they should setup a designated individual (who must also have the same security access) as their PROXY. A PROXY is an individual who would be able to ‘act on your behalf’ as an approver should you be away from the University or your office when Time Sheets or Leave Reports are due for approvals.
Steps for requesting a new Time Approver:

1. If the person being added as an approver does not have HRS (Human Resource System) or INB (Internet Native Banner) access to the Org they will be approving, then the Department Head or Business Manager must complete the form at http://www.slu.edu/services/HR/hris_access.html and forward it to Nick Hebel (977-2336 or hebel@slu.edu). The field that indicates which departments the approver will need access to should be completed using the Banner Timesheet Org. #. Listing each Org separately will assist in avoiding confusion.

2. Once the new approver’s security access has been setup, Nick Hebel will contact the new approver and payroll via timeq@slu.edu, so that the Time Approval Queues can be changed. Approval Queue changes cannot be made until the HRS access has been setup. Changes to Approval Queues before the HRS access is granted will result in errors on the timesheet, and denial of access to the timesheet for the employee.

3. The Department Head or Business Manager should contact payroll at timeq@slu.edu to request a current listing of their current Approval Queue setup. The subject line of the email to timeq@slu.edu should contain the Banner Org. that is being requested i.e.: D010, Z602, T703. Please note that a separate email should be sent for each Org for which the approval queue needs to be changed.

4. Payroll Services will email the Department Head or Business Manager a “Time Approver by Individual by ORGN Report” in excel format. The Department Head or Business Manager will review and insert changes into the spreadsheet. To improve efficiency, and better serve you, we ask that the changes be made by changing your font color in those cells to red. The changes must include the new Approvers position number, Banner ID, and name (as it appears in Banner).

5. The Department Head or Business Manager should then email the excel file back to Payroll using timeq@slu.edu and then a representative from Payroll Services will email the Department Head or Business Manager once all the changes have been made. At that time you can also request a new copy of the “Time Approver by Individual by ORGN Report” for your records.
Chapter 2: Banner Self Service Time and Leave Approvals

Lesson 2-1: Logging On To Banner Self Service

1. Open Internet Explorer browser and go to https://fsselfserv.slu.edu, see Figure 2-1: Banner Login Screen.

2. Enter your ID in the box indicated for SLU Net ID.

3. Enter your password in the box indicated for the SLU Net ID Password.

4. After entering ID and Password, click on Login button. If you do not know your SLU Net ID or SLU Net ID Password call 977-4000 (Helpdesk) or click on the “Click Here for Help with Login” option.

![Figure 2-1: Banner Login Screen](image)
Lesson 2-2: General Information Regarding Time Sheets

Time Sheets are used by hourly paid (biweekly) employees. The time sheet submitted by the employee, once approved by the approver, will transmit electronic records to Payroll Services for processing on the designated pay cycle. Time sheets will not automatically route to Payroll Services if they are not submitted by the employee AND approved by the Approver by the designated due date and time. Employees must start (at the minimum) their time sheet at the beginning of each pay period. By starting the time sheet the employee is allowing the Time Approver, if necessary, the ability to access and complete that time sheet if it should become necessary (employee is out for the period unexpectedly). Automatic email reminders are sent to employees, prior to the Time Sheet deadlines, notifying them that their time sheet is “Not Started” or “In Progress”. If the employee does not start or submit their Time Sheet by the due date and time indicated they run the risk of not being paid, and will not receive payment until a subsequent pay period.

If an employee is out for an extended period of time (approved FMLA leave) it is the Time Approver’s responsibility to contact Payroll Services to have the Time Sheet started (extracted). Once Payroll Services has extracted the time sheet, it will be 'submitted' and the approver may make the necessary time entries AND approve the time sheet.

Time Approvers are also responsible for understanding the University Leave Policies, and how to apply them to time entry. For Holiday time reporting, Payroll Services sends a detailed outline of how Holiday Pay and Holiday banking should be entered on Biweekly Time Sheets, if you have any questions or need assistance you are expected to contact payroll@slu.edu prior to approving the time sheet.

Each time entry on the employee’s time sheet should be reviewed in detail, not just in total, as the approval of the time sheet not only can affect pay it can result in erroneous leave accruals if not accurate.
Lesson 2-3: Approving Biweekly Time Sheets

1. After successful completion of your login from Lesson 2-1, Figure 2-2: Main Menu will appear, click on the Employee option.

Main Menu

Figure 2-2: Main Menu

2. Click on Time Sheet heading (see Figure 2-3).

Employee

Figure 2-3: Employee Menu Choices

3. The Time Reporting Selection (Figure 2-4) screen will appear. The radio button defaults to Approve or Acknowledge Time. Click on the Select button.

Selection Criteria

Access my Time Sheet: ○
Access my Leave Report: ○
Approve or Acknowledge Time: ○
Act as Proxy For: (Select one) [Sel] ○
Act as Superuser: ○

Select

Figure 2-4: Time Reporting Selection

“PROXY SET UP”

Both monthly and biweekly timesheets are available to view 2008 Leave Report implementation. The Leave Reports drop and going forward.
4. For biweekly employees you will be approving **Time Sheets**. From the drop down menu on the **Approver Selection** (Figure 2-5) screen, under the **Pay Period** heading, select the appropriate pay period (based on the dates provided) and click on the **Select** button.

**Approver Selection**

Time Sheet

Department and Description | My Choice | Pay Period
---|---|---
1, DO10, Controller | | 2008MN2, Feb 01, 2008 to Feb 29, 2008

Leave Report

Department and Description | My Choice | Leave Period
---|---|---
1, DO10, Controller | | 2008MN3, Mar 01, 2008 to Mar 31, 2008

Sort Order

<table>
<thead>
<tr>
<th>My Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sort employees' records by Status then by Name:</td>
</tr>
<tr>
<td>Sort employees' records by Name:</td>
</tr>
</tbody>
</table>

**Figure 2-5: Approver Selection Screen**

5. The **Department Summary** (Figure 2-6 below) screen will appear. There are several components of this screen to become familiar with.
   a. **Section A:**
      i. **COA (Chart of Accounts)** defaults in as '1, Saint Louis University'.
      ii. **Department** displays as the Department (Orgn) Number and Department Name. Some approvers have access to more than one Department, and will need to select the appropriate department for time approving from the **Approver Selection** (Figure 2-5 above) screen.
      iii. **Act as Proxy For** defaults to **Not Applicable**, unless you have chosen a name from the drop down on the **Time Reporting Selection** (Figure 2-4 above) screen, in which case the name of the person you selected to **Act as Proxy For** will default into this field.
      iv. **Pay Period**, which you selected to approve time for, will appear in this field.
      v. **Pay Period Time Entry Status** will show the date and time that these time sheets were closed for time entry. Time sheets need to be approved no later than 3PM on the date that the **Pay Period Time Entry Status** indicates.
   b. **Section B:**
      i. Various Buttons are available on the Department Summary screen.
a. **Select New Department** allows time approvers to return to the Approver Selection (Figure 2-5 above) screen to select a different Department for time approving.

b. **Select All, Approve or FYI** places a check mark in the Approve or FYI box next to ALL time sheets listed on the displayed Department Summary (Figure 2-6) screen with a status of Pending. This will not automatically approve those time sheets, it will only place the check mark in the box. The time sheets will not be approved, unless the Save option is selected after the Select All, Approve or FYI option has been exercised. *This option should not be used until each time sheet has been reviewed individually and in detail.*

c. **Reset** button will remove the check marks placed in the boxes under the Select All, Approve or FYI or Return for Correction options. *It is not recommended to use this button.*

d. **Save** will save all options, selected under Select All, Approve or FYI or Return for Correction columns. All Pending time sheets, which have a check mark in the Select All, Approve or FYI, box will be committed to the database and will convert to a status of Approved.

ii. Provides a list of the time sheets, by their status.

a. **Completed**-The time sheet has been successfully processed through the payroll cycle.

b. **Approved**-The time sheet has been approved by the mandatory approver, and cannot be altered by Payroll, the Time Approver, or the employee. This time sheet status will convert to a Completed status when payroll processing is complete.

c. **Pending**-The time sheet has been submitted for approval and is in the Time Approvers’ queue for review and approval. The employee cannot make changes to the time sheet, but the approver can. The time sheet will remain in Pending status until the Time Approver approves it, which will then convert it to an Approved status.

d. **In Progress**-The time sheet has been started (extracted) and hours may have been entered by the employee. If the time sheet is in this status when the due date/time has passed, the Submit button will move from the employee’s view of their time sheet to the Time Approvers view of the time sheet. In those circumstances the Time Approver will need to Submit, review, and Approve the time sheet.

e. **Not Started**-the employee has not touched (extracted) their Time Sheet. If the time sheet is not started, but hours need to be reported for the pay period, the Time Approver should contact Payroll Services for extracting and submission of the time sheet. Once payroll has extracted and submitted the time sheet for the employee, the approver can enter hours on the time sheet by clicking on the Change Time Record option.

f. **Returned for Correction**-this function should not be used by Time Approvers, the employee may not have time to adjust or change and resubmit their time sheet by the due date and time. If this feature is used, the Time Approver who used the feature must also Restart (button will appear on the time sheet) the time sheet so that the employee will be able to access it.

g. **In Error**-occasionally an employees’ time sheet will fall into In Error status. The Time Approver should access that time sheet and take an action of either submitting the time sheet or approving it, after any necessary corrections are made. Contact Payroll Services if you have any questions when trying to correct an In Error time sheet.
c. Section C:
   i. **Pay Event Transactions** indicates to the Time Approver various totals for the time sheets listed in their queue.
   ii. Various Buttons are available on the Department Summary screen, as listed and described in 5(b)(i) above.

### Department Summary

*Select the employee’s name to access additional detail.*

<table>
<thead>
<tr>
<th>ID</th>
<th>Name and Position</th>
<th>Required Action</th>
<th>Total Hours</th>
<th>Total Units</th>
<th>Queue Status</th>
<th>Approve or FYI</th>
<th>Return for Correction</th>
<th>Other Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>000123456</td>
<td>John J. Smith</td>
<td>Approve</td>
<td>48.00</td>
<td>.00</td>
<td></td>
<td></td>
<td></td>
<td>Change Time Record</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>ID</th>
<th>Name and Position</th>
<th>Total Hours</th>
<th>Total Units</th>
<th>Other Information</th>
</tr>
</thead>
<tbody>
<tr>
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<td>Thomas C. Johnson</td>
<td>48.00</td>
<td>.00</td>
<td></td>
</tr>
<tr>
<td>000134568</td>
<td>00012486</td>
<td>42.00</td>
<td>.00</td>
<td></td>
</tr>
<tr>
<td>000487899</td>
<td>Jenny Charlton</td>
<td>32.00</td>
<td>.00</td>
<td></td>
</tr>
</tbody>
</table>

### Pending - Ready for Review and Approval

<table>
<thead>
<tr>
<th>ID</th>
<th>Name and Position</th>
<th>Total Hours</th>
<th>Total Units</th>
<th>Other Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>000054321</td>
<td>Ellen Jacoby</td>
<td>9994982</td>
<td>9994982</td>
<td></td>
</tr>
<tr>
<td>000124567</td>
<td>Ellen Jacoby</td>
<td>9994982</td>
<td>9994982</td>
<td></td>
</tr>
<tr>
<td>00053212</td>
<td>Lane C. Jennings</td>
<td>9994982</td>
<td>9994982</td>
<td></td>
</tr>
<tr>
<td>00011100</td>
<td>Marcia Trumb</td>
<td>9994982</td>
<td>9994982</td>
<td></td>
</tr>
<tr>
<td>000000110</td>
<td>Jane Xu</td>
<td>9994982</td>
<td>9994982</td>
<td></td>
</tr>
<tr>
<td>000081254</td>
<td>Robert Harper</td>
<td>9994982</td>
<td>9994982</td>
<td></td>
</tr>
</tbody>
</table>

### Not Started - If needed, contact Payroll Services to start.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name and Position</th>
<th>Other Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>000054321</td>
<td>Ellen Jacoby</td>
<td></td>
</tr>
<tr>
<td>000124567</td>
<td>Ellen Jacoby</td>
<td></td>
</tr>
<tr>
<td>00053212</td>
<td>Lane C. Jennings</td>
<td></td>
</tr>
<tr>
<td>00011100</td>
<td>Marcia Trumb</td>
<td></td>
</tr>
<tr>
<td>000000110</td>
<td>Jane Xu</td>
<td></td>
</tr>
<tr>
<td>000081254</td>
<td>Robert Harper</td>
<td></td>
</tr>
</tbody>
</table>

---

6. **Pending** Time Sheets should be reviewed and approved first, as they have been completed by the employee and submitted.
   a. To review a **Pending** Time Sheet, click on **Change Time Record** option under the **Other Information** column (Figure 2-6).
b. The **Time and Leave Reporting** (Figure 2-7, below) record for the selected individual will appear. In this window you can select the day/earnings code combination to review each time in/out entry. A better methodology for review is to click on the **Preview** (Figure 2-7) button at the bottom of the screen.

## Time and Leave Reporting

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

### Time Sheet

- **Name:** John J. Smith
- **Title and Number:** Payroll Assistant, Sr. -- 997341-00
- **Department and Number:** Controller -- 2010
- **Time Sheet Period:** Feb 24, 2008 to Mar 08, 2008
- **Submit By Date:** Mar 10, 2008 by 10:00 A.M.

<table>
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<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
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<th></th>
<th></th>
<th></th>
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<td>Regular Hours</td>
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<td>Enter Hours</td>
<td>Enter Hours</td>
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<td>Enter Hours</td>
</tr>
<tr>
<td>Vacation</td>
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<td>Enter Hours</td>
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<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
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</tr>
<tr>
<td>Sick</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>
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</tr>
<tr>
<td>Sick-Caregiver Leave</td>
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<td>Enter Hours</td>
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<td>Holiday Pay</td>
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<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>Holiday-Worked/Accrued</td>
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<td>Enter Hours</td>
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</tr>
<tr>
<td>Holiday-Use Banked</td>
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<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
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<td>Time</td>
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<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unpaid Leave</td>
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<td>Enter Hours</td>
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<td>Enter Hours</td>
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</tr>
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<td>Enter Hours</td>
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<td>Enter Hours</td>
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</tr>
<tr>
<td>FMLA-Sick</td>
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<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>FMLA-Sick-Caregiver</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>Bereavement Leave</td>
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<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>E1-ONLY-Cal In Shif 5</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>E1-ONLY-Cal In Shif 10</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
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<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>E1-ONLY-Cal In Shif 20</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
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<td>Enter Hours</td>
</tr>
<tr>
<td>E1-ONLY-Cal In Shif 25</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>Med Rods ONLY-Shif Diff</td>
<td>0</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
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<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
</tr>
<tr>
<td>E1S ONLY-Evrgn Shif Diff</td>
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<td>Enter Hours</td>
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</tr>
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<td>Jury Duty</td>
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</tr>
<tr>
<td>Military Leave</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>Univ Closed (Not Holiday)</td>
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<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><strong>Total Hours:</strong></td>
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<td>0</td>
<td>9</td>
<td>9</td>
<td>10</td>
<td>10</td>
<td>10</td>
<td>10</td>
</tr>
</tbody>
</table>

- **Submitted for Approval:** Marsha O McBride on Mar 05, 2008
- **Approved By:** Marsha O McBride
- **Waiting for Approval:**

**Figure 2-7: Time And Leave Reporting**

- **c.** The preview version of the time sheet allows for a better, and more efficient, review of the time sheet and the individuals time entries (Figure 2-8 below, see circled areas).

- **i.** For full and part-time, leave accruing employees, the Time Approver should review time entry for regular hours (worked hours), but also for appropriate reporting (according to University Policy) Vacation, Sick, FMLA, Military, Bereavement, Jury Duty, Shift Differentials, and Holiday reporting.
ii. For full or part-time temporary employees and student workers, the Time Approver should review the time sheet for accurate regular hours (worked hours).

iii. For Federal Work Study employees, the Time Approver should review the time sheet to make certain that the worker does not report over 15 hours worked (40 during winter break and summer semester) in any one week.

d. If the entries are correct, click on the **Approve (Figure 2-8)** button and go to your Next employee by proceeding to Step (g) below (**Figure 2-15**).

e. If you need to change, add, or delete an entry, click on the **Change Record (Figure 2-8)** button, which will take you to the **Time and Leave Reporting (Figure 2-7)** screen.

---

**Figure 2-8: Preview of Biweekly Time Sheet**

i. Select the record (**Figure 2-9**), by clicking on the displayed hours for the date and earnings code to be changed. In the example below, click on the “10” hours entered as Regular-Hours on Wednesday, February 27, 2008.
ii. This will bring up the Time In and Out (Figure 2-10) screen for the date and earnings code selected. At this point, the Time Approver can type over times in and out to change them, review and return to the Previous Menu without making changes, review and move to the Next Day or Previous Day, or Delete the entry entirely if completely wrong.

iii. Once reviewed, return to the Previous Menu by clicking on the Previous Menu button.

**Time In and Out**

- Enter time in intervals of 15 minutes in the 99:99 format.

**Date:** Wednesday, Feb 27, 2008  
**Earnings Code:** Regular-Hours

<table>
<thead>
<tr>
<th>Shift</th>
<th>Time In</th>
<th>Time Out</th>
<th>Total Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>08:00 AM</td>
<td>01:00 PM</td>
<td>5</td>
</tr>
<tr>
<td>1</td>
<td>02:00 PM</td>
<td>07:00 PM</td>
<td>5</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td></td>
<td>10</td>
</tr>
</tbody>
</table>

Entries in the Time In and Time Out boxes can be typed over to replace, but will not capture until you click on the Save button.

f. Another option in the Preview version of the time sheet is the ability to add an electronic comment to the time sheet (Figure 2-11 and Figure 2-12), which is recommended if the Time Approver makes any changes to the employees submitted time sheet. The comments are saved (Figure 2-13) by either clicking on the Save or Previous Menu button. Selecting the Confidential Indicator will allow the message to only be viewed by the employee and the Time Approver, not any additional levels of Time Approvers.

**Figure 2-11: Options at bottom of a Preview version of Time Sheet**
Employee: John J. Smith  

Made By: Susie Approver  
Comment Date: Mar 06, 2008  
Confidential Indicator: ☐  
Enter or Edit Comment: I changed your time entry for February 27, 2008 as you only worked 9 hours that day.

Figure 2-12: Comment Screen

Figure 2-13: Comments, as they appear on the Time Sheet after saved

g. Once the time sheet is reviewed, changes made, and any comments added, you are ready to Approve the time sheet. Payroll Services recommends that you not use the Return for Correction or Delete options. Click on the Approve (Figure 2-14) button.

Figure 2-14: Options at bottom of a Preview version of Time Sheet

h. Once approved the “Time transaction successfully approved” message will appear at the top of the time sheet (Figure 2-15).
i. Click on the **Next** (Figure 2-15) button to proceed to the next employee in your approval queue. Since you started this process with the **Pending** time sheets, clicking on the **Next** button will take you alphabetically to the next **Pending** time sheet. Once all **Pending** time sheets have been browsed, the system will take you automatically to the **In Progress** (in alphabetic order) time sheets, then to any **In Error** time sheets. The system will not take you to **Not Started** time sheets, as it cannot recognize who the approver is on a **Not Started** time sheet.

j. When on your last time sheet record, click on the **Previous Menu** (Figure 2-15) button, which will return you to the **Department Summary** (Figure 2-16) screen, at which point you can proceed to **Exit** Banner Self Service, if all time sheets are approved, or **Select New Department** to approve time sheets for your next department, if applicable (Figure 2-16).

7. If the due date and time indicated on the time sheet has passed, and you have employees with **In Progress** time sheets, you will need to take action on their behalf (by the approval deadline) to ensure processing of their time sheet for payment.

   a. Log on to Banner Self Service, as instructed in **Lesson 2-1** on Page 6.

   b. Access the **Department Summary** screen by completing **Lesson 2-3, Steps 1-5**, page 8.

   c. Since the deadline for submission by the employee has passed, the approver will need to move the time sheet forward. There is no **Change Time Record** option for an **In Progress** time sheet, the approver must access the time sheet by clicking on the employees name (Figure 2-17).

   ![Figure 2-15: Time transaction successfully approved and Next option](image1)

   ![Figure 2-16: Department Summary, to either Exit or Select New Department](image2)

   ![Figure 2-17: Selecting an In Progress Time Sheet from the Department Summary screen](image3)
d. This will bring up the **Employee Details** screen for that employee (*Figure 2-18*), which looks like the **Preview** version of a **Pending** Time Sheet. Click on the **Submit** button.

![Figure 2-18: Employee Detail for In Progress Time Sheet](image)

**Time Sheet**

<table>
<thead>
<tr>
<th>Earnings</th>
<th>Shift</th>
<th>Special Rate</th>
<th>Total Hours</th>
<th>Total Units</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular- Hours</td>
<td>1</td>
<td></td>
<td>24:25</td>
<td>8</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>8.25</td>
<td>8</td>
</tr>
</tbody>
</table>

**Total Hours:** 24.25  
**Total Units:** 0

**Time In and Out**

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular- Hours</td>
<td>08:15 AM</td>
<td>08:15 AM</td>
<td>08:15 AM</td>
<td>08:15 AM</td>
<td>08:15 AM</td>
<td>08:15 AM</td>
<td>08:15 AM</td>
<td>08:15 AM</td>
</tr>
<tr>
<td>PM</td>
<td>01:00 PM</td>
<td>01:00 PM</td>
<td>01:00 PM</td>
<td>01:00 PM</td>
<td>01:00 PM</td>
<td>01:00 PM</td>
<td>01:00 PM</td>
<td>01:00 PM</td>
</tr>
</tbody>
</table>

**Figure 2-19: Employee Details options**

![Figure 2-19](image)

e. The time sheet will move to **Pending** status for review and approval, or to be changed (if necessary) and approved.

i. If time sheet (upon review) requires no changes, click on the **Approve** (*Figure 2-19*) button.

ii. If time sheet (upon review) is not complete and requires changes **follow Lesson 2-3, Steps 6(e) through 6(j), page 14**, to **Change Record**.

![Figure 2-20](image)

f. When on your last time sheet record, click on the **Previous Menu** (*Figure 2-20*) button, which will return you to the **Department Summary** (*Figure 2-21*) screen, at which point you can proceed to **Exit Banner Self Service**, if all time sheets are approved, or **Select New Department** to approve another department (*Figure 2-16* above).
8. Biweekly employees are expected, in order to receive pay, to complete and submit their time sheet by the due date and time indicated on the time sheet. Infrequently, an employee may be away from the office (on FMLA Leave) and not be able to complete and submit their time sheet. Under these circumstances, Time Approvers should contact Payroll Services (payroll@slu.edu) to have payroll extract and submit that time sheet, at which point the Time Approver can take control of the Pending time sheet, enter hours, and approve.

If you have any questions or concerns, contact Payroll Services before approving the time sheet so that changes can be made.
Lesson 2-4: Approving Monthly Leave Reports

1. After successful completion of your login, Lesson 2-1, Figure 2-22: Main Menu will appear, click on the Employee option.

Main Menu

> SLU Employees: Changes to your permanent address made after January 4, 2006 will not be reflected on your 2007 W-2 statement. These statements will be mailed on January 31st. If you do not receive your 2007 W-2 statement at your permanent address by the last day of February, please e-mail netlesbi@slu.edu with your permanent mailing address and a replacement will be prepared or your original forwarded to you if it is returned by the postal services. W-2s cannot be picked up.

Employee
- Find time sheets, benefits and deductions, pay information, leave or job data, development course attendance, and W-4 data, trip menu.
- Personal Information
  - Update addresses, contact information or marital status, review name or social security number change information, customize your directory profile, or answer a survey.

Figure 2-24: Main Menu

2. Click on Leave Report or Time Sheet option, both options will take you to the same place (see Figure 2-23).

Employee

Figure 2-23: Employee Menu Choices

3. Time Reporting Selection (Figure 2-24) screen will appear. The radio button defaults to Approve or Acknowledge Time. Click on Select button.

"PROXY SET UP"
Both monthly and biweekly timesheets are available to view 2008 Leave Report implementation. The Leave Reports drop and going forward.

Selection Criteria
- My Choice
  - Access my Time Sheet: ☐
  - Access my Leave Report: ☐
  - Approve or Acknowledge Time: ☐
  - Act as Proxy For: (Select one) Self ☐
  - Act as Superuser: ☐

Select
4. For monthly employees you will be approving **Leave Reports**, not **Time Sheets** (Figure 2-25). The system defaults the radio button selection in the **My Choice** column to **Time Sheet**. You will need to change this before selecting the **Leave Period** you are intending to approve.
   a. Click on the radio button in the **My Choice** column and **Leave Report** row.
   b. From the drop down menu on the **Approver Selection** screen, under the **Leave Period** heading, select the appropriate reporting period (based on the dates provided).
   c. Click on the **Select** button.

**Approver Selection**

- Select the department from **My Choice** and choose the pay ID and period from the pull-down list. Select to access the records.

**Time Sheet**

<table>
<thead>
<tr>
<th>Department and Description</th>
<th>My Choice</th>
<th>Pay Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>1, D010, Controller</td>
<td></td>
<td>2008MN2, Feb 01, 2008 to Feb 29, 2008</td>
</tr>
</tbody>
</table>

**Leave Report**

<table>
<thead>
<tr>
<th>Department and Description</th>
<th>My Choice</th>
<th>Leave Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>1, D010, Controller</td>
<td></td>
<td>2008MN3, Mar 01, 2008 to Mar 31, 2008</td>
</tr>
</tbody>
</table>

**Sort Order**

- Sort employees’ records by Status then by Name:
- Sort employees’ records by Name:

**Select**

5. The **Department Summary** (Figure 2-26 below) screen will appear. There are several components of this screen to become familiar with.
   a. **Section A:**
      i. **COA (Chart of Accounts)** defaults in as ‘1, Saint Louis University’.
      ii. **Department** displays as the Department (Orgn) Number and Department Name. Some approvers have access to more than one Department, and will need to select the appropriate department for leave approving from the **Approver Selection** (Figure 2-25 above) screen.
      iii. **Act as Proxy For** will generally default to **Not Applicable**, unless you have chosen a name from the drop down on the **Time Reporting Selection** (Figure 2-24 above) screen, in which case the name of the person you selected to **Act as Proxy For** will default into this field.
      iv. **Leave Period** which you selected to approve leave for will appear in this field.
v. **Leave Period Leave Entry Status** will show the date and time that these leave reports were closed for leave entry to the **EMPLOYEE**. Leave Reports need to be approved no later than 3PM on the date that the **Leave Period Leave Entry Status** indicates.

b. **Section B:**

i. Various Buttons are available on the Department Summary screen.

1. **Select New Department** allows time approvers to return to the **Approver Selection** (Figure 2-25 above) to select a different Department for leave approving.

2. **Select All, Approve or FYI** places a check mark in the **Approve or FYI** box next to ALL Leave Reports listed on the displayed **Department Summary** (Figure 2-26) with a status of **Pending**. This will not automatically approve the Leave Reports it will only place a check mark in each box. The Leave Reports will not be approved unless the **Save** option is selected after the **Select All, Approve or FYI** option has been exercised. **This option should not be used until each Leave Report has been reviewed individually, and in detail.**

3. **Reset** button will remove the check marks placed in the boxes under the **Select All, Approve or FYI** or **Return for Correction** options. **It is not recommended to use this feature.**

4. **Save** will save all options, selected under **Select All, Approve or FYI** or **Return for Correction** columns. **All Pending** Leave Reports, which have a check mark in the **Select All, Approve or FYI** box will be committed to the database and will convert to a status of **Complete.**

ii. Provides a list of the Leave Reports, by their status. Leave Reports are processed outside the payroll cycle, and do not impact the leave period paycheck, they only update employee's individual leave balances.

1. **Completed**-The Leave Report has been successfully approved by the Time Approver, and leave balances are updated.

2. **Approved**-Leave Reports do not have an **Approved** status, like time sheets. When Leave Reports are approved, their status moves to **Completed.**

3. **Pending**-The Leave Report has been submitted for approval and is in the Time Approvers queue for review and approval. The employee cannot make changes to the Leave Report, but the approver may. It will remain in **Pending** status until the Time Approver approves the leave report, which will then convert it to a **Complete** status.

4. **In Progress**-The Leave Report has been started (extracted) and hours may have been entered by the employee. If the Leave Report is in this status when the due date/time has passed, the **Submit** button will move from the employee’s view of their Leave Report to the Time Approvers view of the Leave Report. In those circumstances the Time Approver will need to **Submit**, review, and **Approve** the Leave Report.

5. **Not Started**-the employee has not touched (extracted) their Leave Report on the web. If the Leave Report is not started, but hours need to be reported for the leave period, the Time Approver should contact Payroll Services for extracting and submitting the Leave Report. Once Payroll has extracted and submitted the Leave Report, the approver can enter hours on it by clicking on the **Change Leave Record** option.
6. **Returned for Correction**—this function should not be used by Time Approvers as the employee may not have time to adjust or change and resubmit their Leave Report by the due date and time. If this feature is used, the Time Approver who used the feature must also **Restart** (button will appear on the time sheet) the Leave Report so that the employee will be able to access it.

7. **In Error**—occasionally an employee’s Leave Report will fall into **In Error** status. The Time Approver should access that Leave Report and take an action of either submitting the Leave Report or approving it, after any necessary corrections are made. Contact Payroll Services if you have any questions when trying to correct an **In Error** time sheet. *Monthly Web Leave Reporting Employees are required to start and submit a Leave Report even if they have no exception (Leave) time to report. These Leave Reports, when submitted, will show a message of "Error-No Time Entered", which is acceptable."

### Section C:

i. **Pay Event Transactions** indicates to the Time Approver various totals for the Leave Reports listed in their queue.

ii. Various Buttons are available on the Department Summary screen, as listed and described in 5(b)(i) above.
6. **Pending** status Leave Reports are those that have been started and submitted by the employee, and they should be approved first.
   a. To review a Pending leave report, click on **Change Leave Record** option under the Other Information column (Figure 2-26).
   b. The **Time and Leave Reporting (Figure 2-27, below)** record for the selected employee will appear. In this window you can select the day/earnings code combination to review each leave entry. A better methodology for review, click on the **Preview (Figure 2-27)** button at the bottom of the screen as this will allow you to not only see the daily leave entries, but to see the **EMPLOYEES CURRENT LEAVE BALANCE AS WELL.**

---

**Time and Leave Reporting**

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

- **No hours entered.**

- **Possible Insufficient Leave Balance for Holiday-Use Block Time.**

**Leave Report**

| Name: | Marcia Clitten |
| Title and Number: | Director -- 997405-00 |
| Department and Number: | Controller -- D010 |
| Submit By Date: | Apr 05, 2008 by 10:00 A.M. |

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>40</td>
<td>Enter Hours</td>
<td>Enter Hours</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
<td>8</td>
</tr>
<tr>
<td>Sick</td>
<td>8</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-Caregiver Leave</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>Holiday-Use block Time</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>FMLA-Leave</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>FMLA-Sick</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>FMLA-Caregiver Leave</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>
</tbody>
</table>

**Total Hours:** 56

**Submitted for Approval:** Marsha D McBride on Mar 07, 2008

**Approved By:** Marsha D McBride

**Waiting for Approval:**

**RELEASE: 7.2.3.1**

---

**Figure 2-27: Time And Leave Reporting**

- The preview version of the Leave Report allows Time Approvers to not only see daily reported absences, but to also see their employee’s currently available leave hours before approving the Leave Report (Figure 2-28, below, see circled areas).
- If the entries are correct, click on the **Approve (Figure 2-28)** button, and proceed to your Next employee.
- If you need to change, add, or delete an entry, click on the **Change Record (Figure 2-28)** button, which will take you to the **Time and Leave Reporting (Figure 2-29)** screen. If no changes are necessary proceed to step “f” below.
i. Select the record to change (Figure 2-29), by clicking on the displayed number of hours for the date and earnings code to be changed. In the example below, click on the “8” Vacation hours on Monday, March 03, 2008.
ii. This will pop up a slight variation of the **Time and Leave Reporting** screen, with the added fields of **Earning**, **Date**, and **Hours** (Figure 2-30). At this point, the Time Approver can type over hours reported to change them. If the hours should not have been entered, either on that date or under that earnings code, type in a zero (0).

iii. To make changes to other weeks, click on the **Next** button to find the week which contains the date you wish to change.

iv. Once reviewed, return to the **Previous Menu** by clicking on the **Previous Menu** button.

---

**Figure 2-30:** Time and Leave Reporting after selecting a record to change

f. Another option in the **Preview** version of the time sheet is the ability to add an electronic comment to the Leave Report (Figure 2-30), which is recommended if the Time Approver makes any changes to the employee’s submitted Leave or wants to make any special notations. The comments are saved (Figure 2-31) by either clicking on the **Save** button or the **Previous Menu** button. Selecting the **Confidential Indicator** will allow the message to only be viewed by the employee and the Time Approver, not any additional levels of Time Approvers.

---

**Comments**

Enter or edit comments until you submit the record for approval. Mark the **Comment Conf**

---

Employee:  Marla Clinton  000125588

---

**Made By:**  Thomas Jensen  
**Comment Date:**  Mar 10, 2008  
**Confidential Indicator:**  
**Enter or Edit Comment:**  Vacation was approved and requested two weeks prior to actual days taken, per University Policy.

---

- 25 -
Once the Leave Report is reviewed, changes made, and any comments added, you are ready to Approve. Payroll Services recommends that you not use the Return for Correction or Delete options. Click on the Approve (Figure 2-33) button.

Once approved, the “Time transaction successfully approved” message will appear at the top of the time sheet (Figure 2-34).

Click on the Next (Figure 2-34) button to proceed to the next employee in your approval queue. Since you started this process with the Pending Leave Reports, clicking on the Next button will take you alphabetically to the next Pending Leave Report. Once all Pending Leave Reports have been browsed, the system will automatically move to the In Progress (in alphabetic order) Leave Reports, next to any that are In Error Leave Reports. The system will not take you to Not Started Leave Reports, as it cannot recognize who the approver is on a Not Started Leave Report.

Below is a before approved and an after approved view of a Leave Report (Figure 2-35 and Figure 2-36), which details one of the best features to leave reporting. That is the automatic update to leave balances when a Leave Report is approved by the Time Approver (see highlighted areas).

If any of the Available Balance columns (only exception is Other Staff Absences) goes to a negative number (Figure 2-36, see circled number) after approval of the leave report, those hours will be ‘docked’ on the next pay check to the employee. If an employee leaves employment, prior to the recovery of these negative hours, the department will be contacted with instructions on how to make the recovery.
When on your last Leave Report, click on Previous Menu (Figure 2-34) button, which returns you to the Department Summary (Figure 2-37) screen. At this point
you can proceed to **Exit Banner Self Service**, if all Leave Reports are approved, or **Select New Department** to approve other departments leave reports **(Figure 2-37)**.

### Department Summary

- **COA:** 1, Saint Louis University
- **Department:** 000, Controller
- **Act as Proxy For:** Not Applicable
- **Leave Period:** Mar 01, 2008 to Mar 31, 2008
- **Leave Period Leave Entry Status:** Open until Apr 05, 2008, 10:00 A.M.

**Figure 2-37:** Department Summary, to either Exit or Select New Department

7. If the due date and time indicated on the Leave Report has passed, and you have employees with **In Progress** Leave Reports, you will need to take action on their behalf (by the approval deadline) to ensure processing of their Leave Report, and to avoid the need to prepare and submit a Time Reporting Change Form.
   a. Log on to Banner Self Service, as instructed in **Lesson 2-1** on Page 6.
   b. Access the **Department Summary** screen by completing **Lesson 2-4, Steps 1-5, Pages 19-22**.
   c. There is no **Change Leave Record** option for an **In Progress** Leave Report, the approver must contact Payroll Services and have Payroll **Submit** the Leave Report.
   d. The Leave Report is now ready to be reviewed and approved, or to be changed (if necessary) and approved.
      i. If Leave Report (upon review) requires no changes, click on the **Approve** (**Figure 2-38**) button.
      ii. If time sheet (upon review) is not complete and requires changes follow **Lesson 2-4, Step 6, Pages 23-27**, to **Change Record**.

**Figure 2-38:** Employee Details options

- e. When on your last leave record, click on the **Previous Menu** (**Figure 2-39**) button, which will return you to the **Department Summary** (**Figure 2-37**) screen, at which point you can proceed to **Exit Banner Self Service**, if all Leave Reports are approved, or **Select New Department** to approve another department, if applicable (**Figure 2-40**).
Figure 2-39: Time transaction successfully approved and Previous Menu

- Time transaction successfully approved and Previous Menu -

Figure 2-40: Department Summary

Department Summary

- Select the employee's name to access additional details.

COA: 1, Saint Louis University
Department: DD010, Controller
Act as Proxy For: Not Applicable
Pay Period Time Entry Status: Open until Mar 10, 2008, 10:00 A.M.

Monthly employees are expected to complete and submit their Leave Report by the due date and time indicated on the Leave Report, even if they have no exception time to report. Infrequently, and employee may be away from the office (on FMLA Leave) and not be able to complete and submit their Leave Report. Under these circumstances, Time Approvers should contact Payroll Services (payroll@slu.edu) to have payroll extract and submit the Leave Report, at which point the Time Approver can take control of that Pending Leave Report, enter absences (if taken), and approve. It is important for Time Approvers to be aware of, and responsible for, reviewing their employees’ available leave balances. If you have an employee who you know should be receiving unpaid leave (FMLA Unpaid or Regular Unpaid) for all, or any portion of, a pay period you should contact Payroll Services by the monthly EPAF deadline for instructions to report those unpaid hours.

As always, if you have any questions or concerns, contact Payroll Services before approving the Leave Report so that changes can be made.
Chapter 3: Department Time Entry and Approvals in INB (Internet Native Banner)

Lesson 3-1: Logging on to mySLU (formerly Gateway)

1. Open Internet Explorer browser and go to http://gateway.slu.edu, see Figure 3-1: mySLU (formerly Gateway Portal).
2. Enter your ID in the box indicated for SLU Net ID.
3. Enter your SLU Net ID password in the box indicated for the Password.
4. After entering ID and password, click on Login button. If you do not know your SLU Net ID or SLU Net ID Password click on “Having problems logging in?” option for instructions.

Figure 3-1: mySLU (formerly Gateway Portal)

5. Click on the Tools option of the Welcome screen (Figure 3-2).

Figure 3-2: Welcome to mySLU
6. Click on the **Internet Native Banner** option (Figure 3-3). This will take you directly into the Production database for Internet Native Banner, without another login being needed, unless you have been provided with an alternate login, from HRIS security, for Time Approvals.

![Tools Options](image1)

**Figure 3-3: Tools Options**

7. After you log into Internet Native Banner, the General Menu appears. In Internet Native Banner different screens are called forms rather than screens, and each form can contain several blocks (which will be identified later).

![General Menu](image2)

**Figure 3-4: Internet Native Banner General Menu**

8. Proceed to **Lesson 3-2**.
Lesson 3-2: Department Time Entry Form (PHATIME)

1. In the direct access box of the General Menu (Figure 3-5) form type in PHATIME and press Enter.

![Figure 3-5: General Menu]

Type PHATIME

2. The Electronic Approvals of Time Entry PHATIME (Figure 3-6) form will open, with the cursor defaulting into the Orgn field. Your username will automatically default into the 1st field on the form. For the purposes of this training we will focus on each block individually, the block below being identified as the General Block.

![Figure 3-6: General Block of PHATIME Form]

3. In this block, the goal is to Start (Initiate) time sheets for Faculty, Graduate Assistants, Supplemental Pay positions, and/or Housestaff personnel who are assigned to your Orgn. To accomplish this, several boxes in the General Block must be completed, and/or changed.

   a. If you are acting as the PROXY for another Time Approver (see ‘a’ in Figure 3-6), you will type the username of that approver in the Proxy For field. If you do not know the username of the approver, you can click on the drop down button to the right of the Proxy For field, and select the approver from the drop down list.

   b. The letter and number for the department (Organization) you are certifying should be entered in the Organization field (see ‘b’ in Figure 3-6), example: D010, Z464, etc.

   c. The current year (based on today's date) will default into the Year field (see ‘c’ in Figure 3-6) field, and will rarely have to be changed. If it does have to be manually changed, type the appropriate calendar year in this field.

   d. The Payroll ID, for monthly payroll, is MN. Type that into the Payroll ID field (see ‘d’ in Figure 3-6).

   e. The last field to complete in this block is the Payroll Number (see ‘e’ in Figure 3-6), which is simply the month number you are certifying. Example: January is “1”, February is “2”, March is “3”, etc.
f. Press the Tab key, which will pop up an option as follows (Figure 3-7) and will provide the to/from dates for the Payroll Number you entered (for verification purposes).


g. Click on OK button.

Figure 3-7: Time Entry Selection Criteria on PHATIME

4. An Extract Process pop up will immediately appear on the form, “Do you want to extract time to begin time entry?” Click on the Yes button (Figure 3-8).

Figure 3-8: Extract Process

5. The processing hourglass will appear and Internet Native Banner will start (extract) the department time sheets for Faculty, Supplemental Pay positions, Graduate Assistants, and Housestaff. When Banner has the time sheets extracted, it will inform you as to how many time records were extracted (Figure 3-9). On rare occasions, the message could include
time records with errors, and you will be asked if you would like to view those errors. If this happens, contact Payroll Services for assistance. Click on the **Continue** button.

6. Click on the **OK** button (**Figure 3-10**).

7. At this point, you will be dropped into the **JOBS** Block of **PHATIME**. Each person listed in the department needs to have exception time entered (if applicable) and their time sheet submitted similar to a Web Time Sheet, but by using Internet Native Banner (**Figure 3-11**).
a. Employees are listed alphabetically, one at a time, in the JOBS Block (Figure 3-12). If, when reviewing, you find the name and position number of a person who should no longer be active on Payroll, contact HRIS@slu.edu AND Payroll@slu.edu right away to correct. Review record, and if no changes or exception time is to be entered, proceed to step (b).

i. To enter exception time for the specific employee and position number displayed, press the CTRL and PAGE DOWN (Ctrl-PgDn) keys simultaneously. This will drop you into the TIME ENTRY block.

ii. Click on the ‘search’ button (Figure 3-12) for a list of valid Earnings Codes for this employee.

iii. Select the appropriate Earnings Code from the pop up (Figure 3-12) window, and click on the OK button.

iv. Using your Tab key, Tab over to the appropriate dates (Example: March 10 through March 14) involved in the absence. The form will scroll left automatically when you use the Tab option in this way.

v. Type in the number of hours in the absence field, and Tab to the next affected date, repeat until all absences have been recorded (Figure 3-13).
vi. Press the **F10** function key on your keyboard to save the entries. A “Transaction complete; applied records saved” message (**Figure 3-14**) will appear at the bottom of the form.

vii. If more than one type of leave needs to be reported, press your ↓ (down arrow key on keyboard) to move to the next line of the Time Entry block, repeat steps 7(a)(i) through 7(a)(vi).

![Figure 3-13: Transaction saved message](image)

viii. After all absences are reported for the displayed employee, press **CTRL** and **PAGE UP** (Ctrl-PgUp) simultaneously, to return to the **JOBS** block (**Figure 3-11** above).

b. Submit Time Sheet by clicking on **Options** from the tool bar.

c. Click on option for **Submit Time for Approvals**.

![Figure 3-14: Submitting Time Sheet for Approval on PHATIME](image)

d. Use the ↓ down arrow key on your keyboard to proceed to your next employee’s **JOBS** block.

8. Repeat Step 7 for all employees in the department, until you get to the last employee, which will indicate “At Last Record” (**Figure 3-15**).

![Figure 3-15: PHATIME At Last Record](image)

9. Exit **PHATIME** by clicking on the “X” indicated (**Figure 3-16**).

![Figure 3-16: Exit button on Tool Bar on PHATIME](image)
10. Proceed to Lesson 3-3.
Lesson 3-3: Certifying Continued Eligibility for Pay

1. Repeat Lesson 3-2: Logging on to Internet Native Banner or, if already logged on, type PHADSUM in the Go To field of the General Menu form (Figure 3-17).

2. If you have gone to PHADSUM immediately after using PHATIME, many fields will default in based on your PHATIME choices. If not, there are fields that may need to be populated by you.
   a. User ID will default into form.
   b. Proxy For may need to be populated, as instructed in Lesson 3-2, Step 3(a).
   c. Approval of should always be Time Sheet. If not defaulted in as Time Sheet, click on drop down to change to Time Sheet selection.
   d. COA should always be “1”.
   e. Organization should default, or can be changed by typing in appropriate department number.
   f. Transaction Status should be changed to All (Except for Not Started), choose from the Transaction Status drop down menu options.
   g. Year, Payroll ID, and Payroll No should default in, or be selected as instructed in Lesson 3-2, Step 3(c) through 3(e).
   h. Press the Ctrl and Page Down (Ctrl-PgDn) keys simultaneously.

3. You will now be dropped into the PHADSUM summary block (Figure 3-19).
   a. ID is the employees Banner ID Number, with the employee’s name to the right of that.
   b. Position number for employee.
c. **Queue Status** will show if the time sheet is *In Progress*, *Pending*, *In Error*, *Returned for Correction*, or *Approved*.
d. **Required Action** tells what needs to be done to the time sheet to advance it in the process.
e. **Approve or Acknowledge**, the boxes that can be checked for each employee if their time sheet is in *Pending Status*. This will not automatically approve the time sheet, until applied or saved.
f. **Return for Correction** should never be used in this process.
g. **Comments Exist** informs the approver that comments were added to this time sheet during the PHATIME process, **Lesson 3-2**.
h. **Errors Exist** will tell the approver that there is an error message appearing on the time sheet. The message is most likely “No Hours Entered”, which is acceptable and should really be considered a warning or caution.

![Figure 3-19: PHADSUM summary block](image)

4. Navigation in the **PHADSUM** summary block is accomplished by using the up and down arrow keys on your keyboard. Proceed in using the down arrow, or if at last record, up arrow to review each time entry (**Figure 3-20**). As you scroll through the names, you will want to make sure any absences that were reported on **PHATIME**, appear on this form in total (**Figure 3-20**). For instance, see the arrow in **Figure 3-20** below, which indicates that the highlighted employee has 40.0 hours of Unpaid Leave reported for them by the Time Approver.

![Figure 3-20: PHADSUM leave totals reported for highlighted employee](image)
5. Once all records have been reviewed, click on **Options** on the tool bar, then click on **Approve or Acknowledge All**, which will place a check mark in all **Pending** status time sheets ONLY (Figure 3-21).

![Figure 3-21: PHADSUM Approve or Acknowledge All](image)

6. Click again on **Options** from the tool bar, click on **Apply All Actions**, which takes all **Pending** time sheets and converts their status to **Approved**, with a blank **Required Action** field. Any time sheets that were not approved, will be shown first on the form (Figure 3-22).

![Figure 3-22: PHADSUM after transactions have been applied](image)

7. Exit **PHADSUM** by clicking on the 'X' (Figure 3-22).

8. This will take you back to the **General Menu**, exit **Internet Native Banner** by clicking on the 'X' (Figure 3-230). Close your Internet Explorer browser.
Figure 3-23: Banner General Menu
Chapter 4: Payroll Services – Contact List

Nila Mehta – Payroll Clerk, Sr.  
977-2470  mehtans@slu.edu  
- Monthly Payroll Processing and Coordination  
- Non-Resident Alien Tax Issues  
- Labor Redistributions

Maureen Gaines – Payroll Clerk, Sr.  
977-2384  mgaines1@slu.edu  
- Biweekly Payroll Processing and Coordination  
- Vacation Payouts  
- Garnishments and Child Support

Scott Denney – Payroll Clerk  
977-2474  sdenney@slu.edu  
- Time Reporting Change Forms  
- Time Approver Queue Setup and Maintenance  
- Direct Deposit Setup

Leora Nettles – Payroll Clerk  
977-2385  nettlesl@slu.edu  
- Parking Deductions  
- Union Dues  
- United Way  
- Savings Bonds

Marsha McBride – Director  
977-2383  mcbride@slu.edu