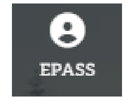
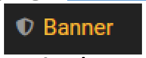
Approving Leave Reports for Salaried Staff – Banner Self-Service Employee Dashboard

Please follow the instructions below to approve leave reports:

1. Go to the PLU landing page www.plu.edu and on the right-hand side click on '**EPASS**'

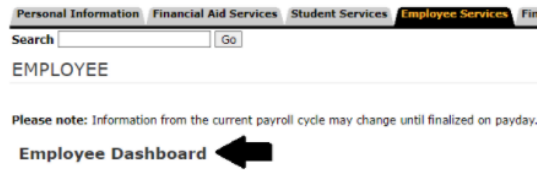


2. Next click on '**Banner**'



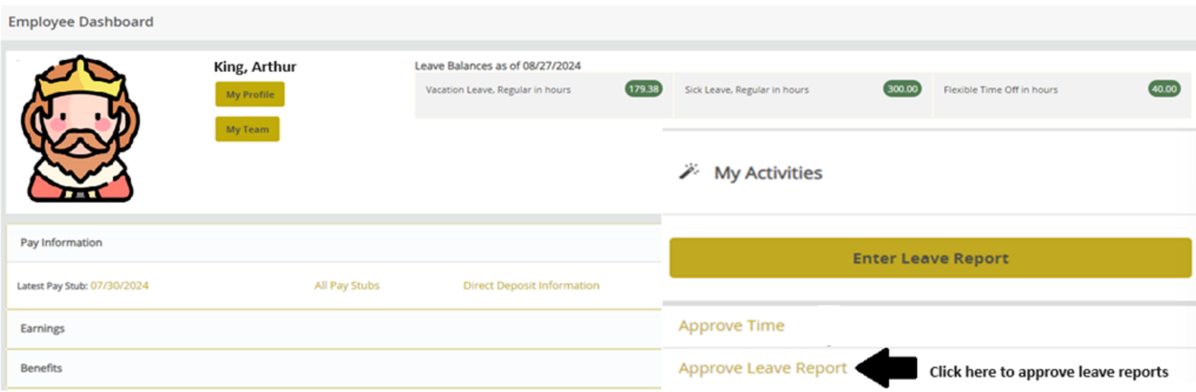
3. Click on '**Banner Self-Service**'

4. Once logged in you should be on the **Employee Services** tab.
5. Click on **'Employee Dashboard'**

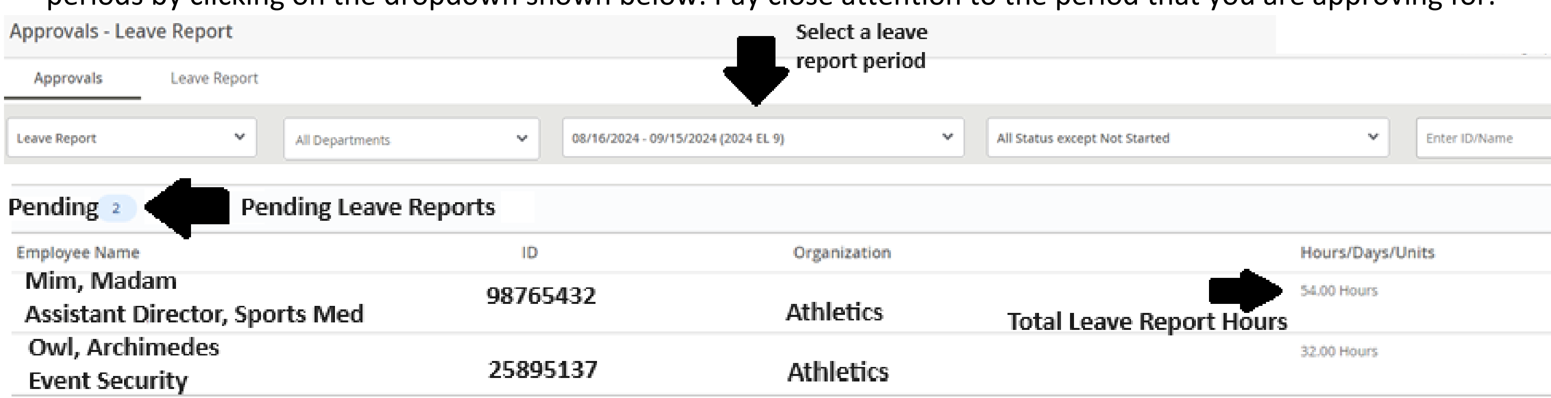


How to Approve Leave Reports:

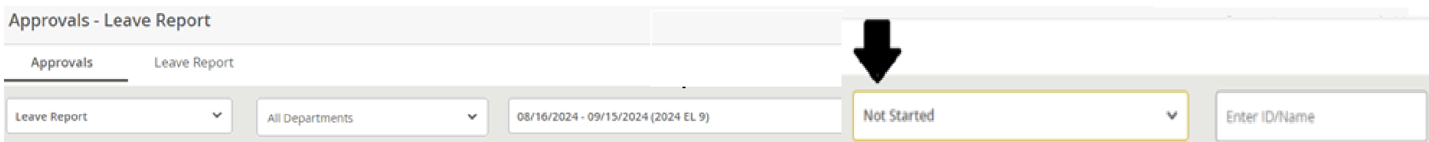
1. From your Dashboard, click on **'Approve Leave Report'** under the My Activities area on the right-hand side.
    a. To approve as a Proxy, see page 5.



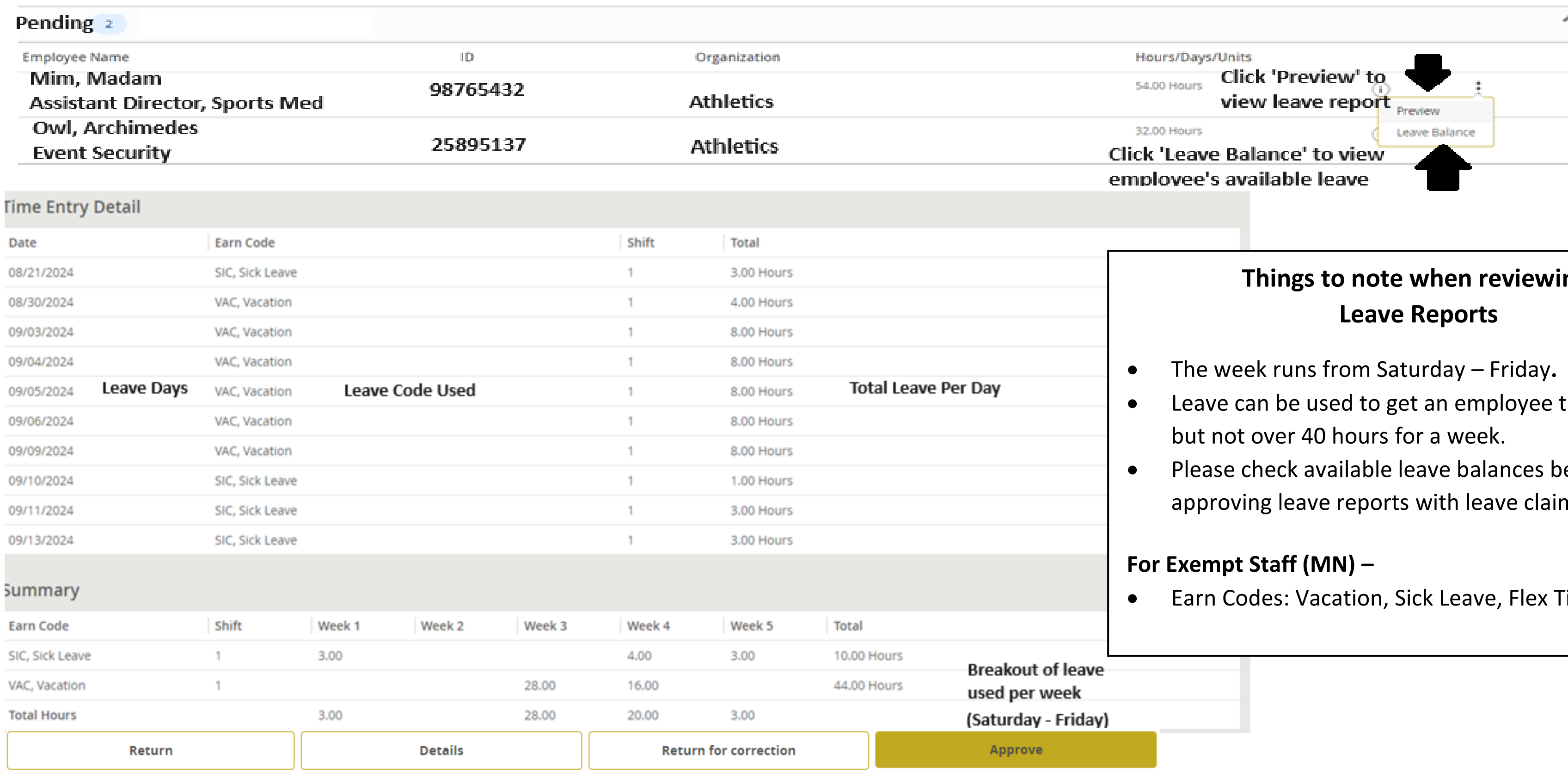
2. On the next page you will see everyone who has a leave report that you approve for. You can easily navigate between leave reporting periods by clicking on the dropdown shown below. Pay close attention to the period that you are approving for.



3. Leave Reports will be sorted based on their status. Here are the most common statuses and what they mean:
   - **Pending** – Leave Reports submitted and awaiting approval
   - **In Progress** – Leave Reports started, but not submitted (once submission deadline passes, please submit for employee)
   - **Returned** – Leave Reports with incorrect or missing hours that have been returned for correction
   - **Error** – Leave Reports with a warning of an error or potential problem (most are not vital but please review before moving on)
   - **Approved** – Leave Reports successfully approved
   - **Not Started** – Leave Report has not been opened by employee
     i. To view '**Not Started**' Leave Reports, use the dropdown to the right of the pay period and select '**Not Started'.**



4. **You will need to open each Leave Report to approve -** Click on the employee's name or click on ⋮ and select '**Preview**'.



Date	Earn Code	Shift	Total
08/21/2024	SIC, Sick Leave	1	3.00 Hours
08/30/2024	VAC, Vacation	1	4.00 Hours
09/03/2024	VAC, Vacation	1	8.00 Hours
09/04/2024	VAC, Vacation	1	8.00 Hours
09/05/2024	VAC, Vacation	1	8.00 Hours
09/06/2024	VAC, Vacation	1	8.00 Hours
09/09/2024	VAC, Vacation	1	8.00 Hours
09/10/2024	SIC, Sick Leave	1	1.00 Hours
09/11/2024	SIC, Sick Leave	1	3.00 Hours
09/13/2024	SIC, Sick Leave	1	3.00 Hours

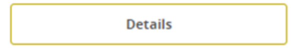
Earn Code	Shift	Week 1	Week 2	Week 3	Week 4	Week 5	Total
SIC, Sick Leave	1	3.00			4.00	3.00	10.00 Hours
VAC, Vacation	1			28.00	16.00		44.00 Hours
Total Hours		3.00		28.00	20.00	3.00	

Things to note when reviewing Leave Reports

- The week runs from Saturday – Friday**.**
- Leave can be used to get an employee to 40 hours but not over 40 hours for a week.
- Please check available leave balances before approving leave reports with leave claimed.

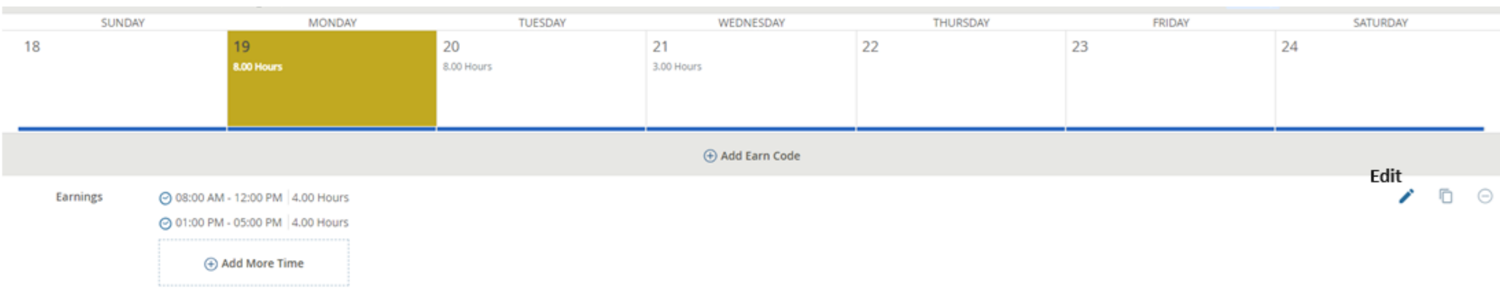
For Exempt Staff (MN) –

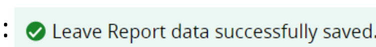
- Earn Codes: Vacation, Sick Leave, Flex Time Off, etc.

5. You will start on the ‘**Preview**’ page which shows the summary of the leave report with action buttons on the bottom of the page.
   - **To view detailed version of the leave report** – click on ‘**Details**’. 

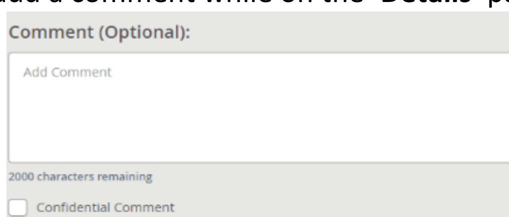
   - If you notice days/hours that need to be adjusted you can either send the leave report back to the employee or you can edit the hours yourself.
      a. **To have the employee correct the Leave Report** – click ‘**Return for Correction**’. 

         i. You will be asked to leave a comment indicating the correction needed before you can return the leave report.
      b. **To make changes to a leave report** – make sure you are in the ‘**Details**’ view.
         i. Click on the day that needs to be adjusted (selected day will be highlighted).

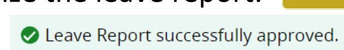


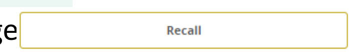
         ii. Click on the pencil icon to edit.
         iii. Once all applicable changes for the day are made, click on ‘**Save**’. You should see this: 

         iv. Once all days that needed to be updated are complete, click **‘Preview’** to review changes on summary screen.
         v. Leave a comment at the bottom of the **‘Preview’** page to let your employee know why their leave report was changed.
            - To add a comment while on the ‘**Details**’ page, click  and add comment to pop up box:

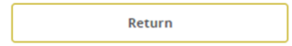


   - If the details of the leave report look correct, click ‘**Approve**’ to finalize the leave report. 

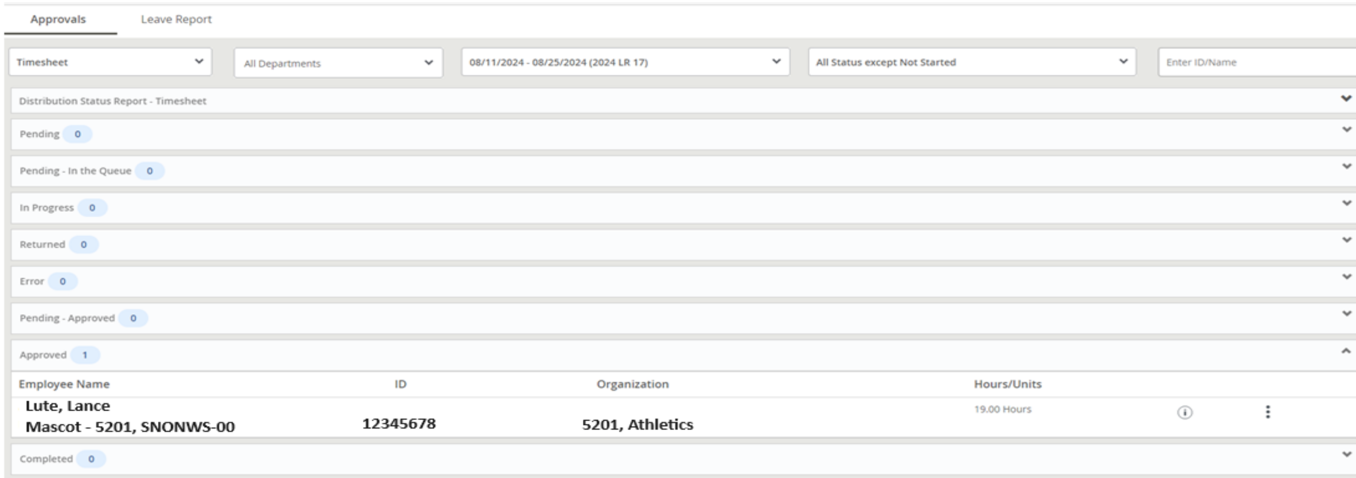
      a. Once leave report is approved, you should see this message: 

   - If you need to make a change to an approved leave report – click ‘**Recall**’ and make change 

      a. You will need to approve the leave report again once changes are complete.
   - **DO NOT** click on **‘Delete’**. This will completely remove the leave report and all saved data will be lost. 

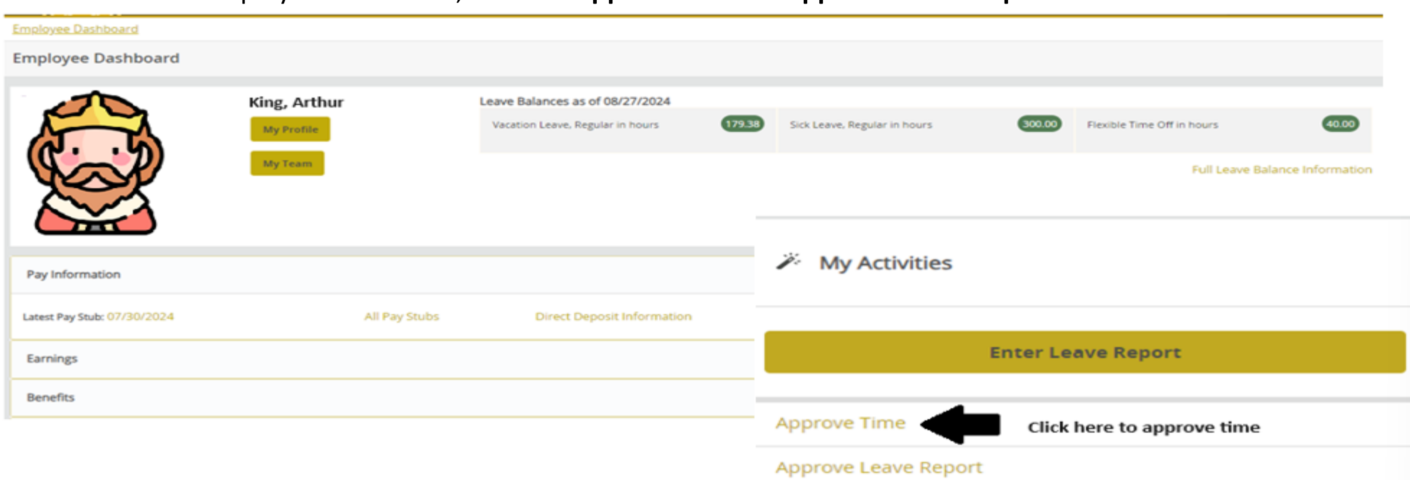
6. To navigate back to the page showing all leave report for the period click ‘**Return**’. 

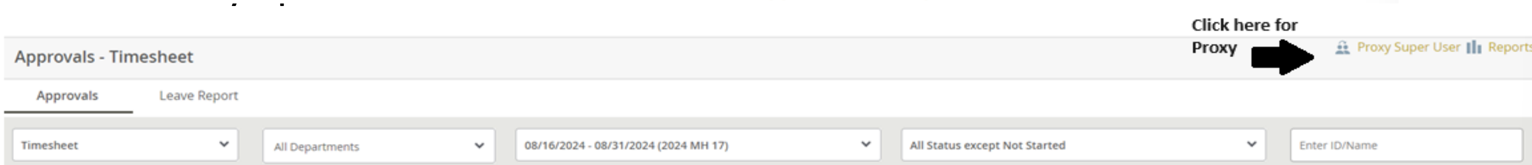
7. Once all employees are approved, you should see all leave reports under ‘Approved’ and all other statuses showing ‘0’ leave reports.



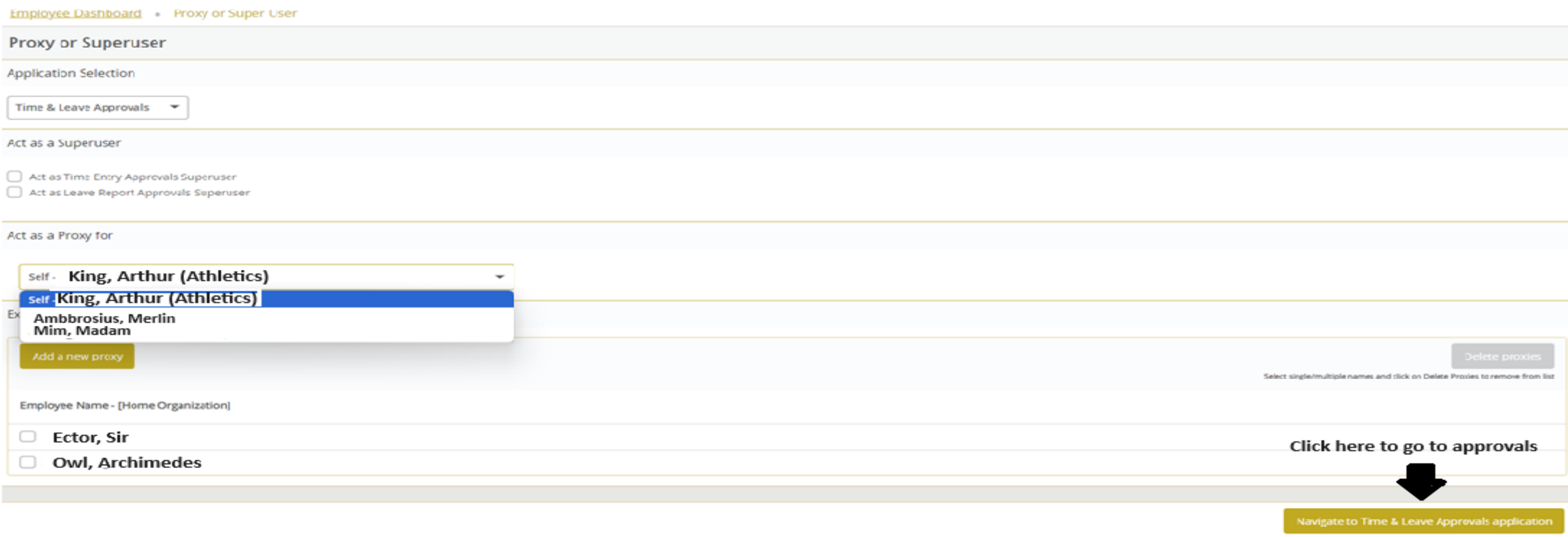
To Approve as a Proxy –

1. From the Employee Dashboard, click on ‘**Approve Time or Approve Leave Report**’.



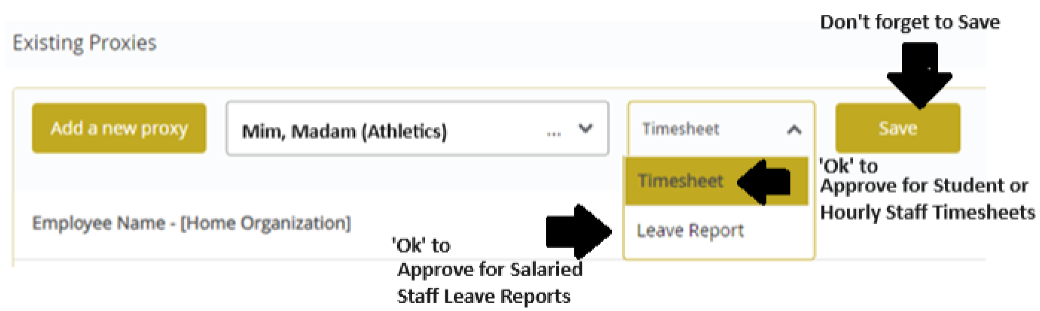


3. Click on **'Act as a Proxy** for' to select who you are approving on behalf of. Then, click on **'Navigate to Time & Leave Approvals Application'**.



To Add a New Proxy for Approvals –

1. Click on '**Add New Proxy**'.



2. Select who you wish to add as your proxy from the drop-down list **or** type their name into the search bar at the top of the list.
    a. Be very careful as some employees share similar names.
    b. Student employees as well as staff will populate from the dropdown list.
        i. Students should not be approving leave reports.
    c. If the person you want to set-up is missing from the list, please reach out to Payroll.