

The College of Idaho

Guideline Name:	Self-Service Leave Request and Timesheet Approvals
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Approval Date:	December 14, 2020

Summary/Purpose: The purpose of this document is to provide instructions to management and staff on the steps and process they should use to request Leave and to perform Approvals for timesheets in the Self Service on-line application. Readers are encouraged to send questions regarding the contents of this document to the Help Desk; helpdesk@collegeofidaho.edu.

Contents

LEAVE APPROVAL	2
TIMESHEET APPROVAL	4
Adjustments after Approval or Rejection	7
Leave Information	8
COMMON TIMESHEET PITFALLS	8
NOTIFICATIONS	9
EMPLOYEES WITH MULTIPLE POSITIONS	11
EMPLOYEE PROXY	11
Acting as a Proxy	14
VERSION CONTROL	15

Self-Service Leave Request and Timesheet Approvals

Along with the release of Self Service timesheets, C of I staff who are leave-eligible can also submit leave requests. Once a leave request has been approved it can be applied directly toward recorded hours on timesheets.

- 1. Login to Self Service using your YoteNet ID at https://selfservice.collegeofidaho.edu/
- 2. Select the "Employee" menu.

Hello, welcome to Self Service. Overs a Gagey tradition	
Banking Information view and update your harring information	Employee Very part for form uniterity, earnings delements, besting information, treasants and issue balances.
Course Offerings very paular very patient the course catalog	Faculty www.your active classes and submit grades for musiems.

LEAVE APPROVAL

Leave requests do not currently have an automated notification. Your employee must tell you about any new leave requests.

3. Select "Leave Approval."

ĊB	Time Entry Fit out your transitient.	Time Approval Approve or reject timesbeets for the people you supervise.
•	Employee Proxy Delegate action types of work tasks to another employee.	Earnings Statements Vew your existing statement britisy.
8	Easy Leave new your wave balances and leave requests.	Leave Approval Here you can approve of reject were requests for people you supervise.

4. Select the employee who requested leave.

TEST Self Service	
Employment · Employee · Leave Approval	
Leave Approval	
ि Filter	
V Benjamin, Teddy - 0631267	
×	

5. Click "View" to review the details of the request.

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 Benjamin, Teldy - 0631267 						
Employee Leave - As Of 11/2/202	10 (I)					
Description.	starting datasis	tener	Unit	Adjuniments.	Balance	
Fluening Holiday	0.00	32.00	0.00	0.00	12.00	*** View
Administrative Annual Leave	0.00	90.00	0.00	0.00	66.00	View
mployee Leave Requests						
Laster Type	tolarmours	Date Range	Ардитично	Salar		-
Vacation	41.00	11/16/2020 - 11/29/2020		(harrower)	× 0	() () () () () () () () () ()

6. Select your decision regarding the request.

Beham to Summary Pase										
Mr Teddy Benjamin 9631267								~		
mployee's Outstanding Leave Requests	Vacation 1	1/16/2020 - 11/20/2	020 Laborate				1	1	ø	e.
Lane Type							Approve	Report	Commi	em:
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1, August 1997	. Victor		8			Total Repairing, 43,20 hours				
	Start Date	0		End Date						
	11/16/20	20	ü	+1/pprovan		Ö				
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	5	13	10	17	10	19	20		21	3

a. If you "Reject" the request then you must enter, "comments explaining your decision. **Remember, this** will be attached to the employee's record so be professional.

Reject Leave Request		×
Rejected By Employee Rejecting Request For Reason	Mr Teddy Benjamin Vacation 11/16/2020 - 11/20/2	2020
This is open enrollment, this	is not a good time for you to take leav	e.
Cancel		Reject

b. If you approve the leave, it will load into their timesheet for that week.

Leave Approval < <u>Return to Summary Page</u>		
Mr Teddy Benjamin		
Employee's Outstanding	_eave Requests	Vacation 11/16/2020 - 11/20/2020 Approved
Leave Type Total Hours Date Range Approver Status	Vacation 40.00 <u>11/16/2020 - 11/20/2020</u> Approved	Leave Type

TIMESHEET APPROVAL

Timesheets are now setup to be entered and submitted weekly.

Timesheets submitted differently depending on the employee type. See the table below to see how each group of employees will submit their timesheets and how you as the supervisor should apply decisions.

Employee Type	Timesheet submission Information	Supervisor Decision Information
Student Employee	Submits timesheets only on weeks the	Only apply a decision if a timesheet is submitted
	employee works.	for that week.
Hourly Employee	Submits a timesheet for every week of the	Each week's timesheet will need a decision
поиту стрюуее	pay period.	applied.
Evenent Employee	Submits a timesheet only when leave is	Only apply a decision if a timesheet is submitted
Exempt Employee	taken, or it is a holiday.	for that week.

You will receive an email notification containing the employee's name, the period the timesheet is for, and the employee's position whenever an employee submits their timesheet.

Time Sheet Submitted

A time sheet for 08/24/2020- 08/29/2020 for for position was submitted. Please review the timesheet and apply your decision.

.

7. Select the "Time Approval" menu item.



- 8. Find the employee's timesheet you wish to review and click on the "View" icon.
 - a. If the employee is not required to submit a timesheet for each week, the status will show "Not Complete." You will need to use the "View" option to review each timesheet.

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									1000		

9. The employee's hours for the week under review will be displayed.

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Hours as entered	40.001 (<u>Samman</u>)								
by the employee.	Gen Tige.	5e80	Mar N24	For W25	weekos	754.8022	919-9428	Set KOY Test	
	Wurk Schedule		176	9.40	8.00	8.00	8.00		40.00
	Support Staff Pay		676	10.00	10.00				28.00
	Vacather					436	.400		12.00
	Pearton Tatal Hours	1.00	8.89	10.00	79.00	400	1.06	0.00	40.00
	Weeks Totale								
	Dulle Total Nours. Regular Hours	4.05	6.00	10.00	10.00	430	ALCO S Gar Ca	ummarized total by ning type. Overtime iculated will show in this section.	*

10. To approve the timesheet click the "Approve" button.

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Apple 00/24/2020 - 08/25/2020 ALCO Total houts Subsetted	3						Other Actions	Approve
am fype	Sun 8/25	Mon BOA	Tue 8/23	Weat 8726	THU 8/27	011 B/228	Sal M29 Trilai	
				and the second second	10000	som bill		

11. To reject the timesheet use the "Other Actions" drop down and select "Reject."

Time Approval - :	aore							
Week 00/24/2030 - 05/29/2020 40.00 Tittal hears	3						Other Actions	Approve
Comments.						2	yttaove	
42.02 (Saferme)							Reject	0
							Comments	
Eam Type	5un 8023	Mon 8/04	The 8/05	Wed 6/26	11nu 6/27	Fit 8/28	Set 6/29 Total	
Work Schedule		8.00	8.00	6.00	8.00	8.00		40.00

12. Enter comments regarding your reason for rejecting the timesheet. **Remember, this will be attached to the employee's record so be professional.**

Reject Time Sheet			×
Rejected By Employee Rejecting time for: Reason	08/30/2020 - 09/05	5/2020	
You forgot to log your overti	me.		
(
Cance	0	Reject	

13. The employee will be notified of your rejection decision, and you will be notified when the employee resubmits their timesheet.

Remember that you need to apply a decision for each week that a timesheet has been submitted.

Adjustments after Approval or Rejection

Occasionally you may mistakenly approve or reject a timesheet. In Self Service, supervisors can now change their decision without the employee needing to act. This can be done any time before the final timesheet deadline.

1. From within the timesheet select the "Other Actions" button and either choose "Unapprove" or "Unreject."

ime Approval - Norm 3ce.eece	ns, Sarir C								
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							Paper Cannord		
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2. You can also directly reverse a mistaken decision by changing an approved timesheet to rejected, or a rejected timesheet to approved.

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Time approval for Supervisors

Leave Information

Doctor Appointment - 2 hours per occurrence, up to 4 hours per month. If you or your employee has a doctor appointment over 2 hours long in one day, please use sick pay for the time above the 2 hours.

Community Service - 2 hours per month.

Bereavement Pay - 3 days per occurrence, immediate family members only.

Holiday Pay – use only on college paid holidays, holiday's will be noted in Self-Service. In addition to the email HR sends out at the beginning of the year of which days are college paid holidays, payroll also sends out a very specific email during the month the holiday falls in on how to claim holiday pay. Please remember if you or your employees work on a holiday, they need to send payroll an email stating as such.

Floating Holidays - All employees must use their floating holidays by June 23rd each year. If you have not used your floating holidays by then, you will lose them. They accrue again on July 1st.

COMMON TIMESHEET PITFALLS

Situation #1 - Overtime on hourly employees

The College is on a Sunday to Saturday work week.

Solution - Look for any vacation, doctor appointments, sick leave, floating holidays, or holiday pay for the weeks where overtime is being calculated. The College only pays overtime on actual worked hours. College policy states no overtime will be paid for non-worked hours over 40. If you see these earn types in a week that has over 40 hours, reject the timesheet and inform the employee about the problem so they can correct and re-submit their timesheet.

Payroll spends many hours looking over hourly employee's submitted time to make sure the overtime is calculating correctly, so please help them catch this before it reaches them.

Situation #2 - Your employee started their timesheet but has not completed it, and the payroll deadline is closing.

Solution - If you cannot reach your employee by the payroll deadline then you should reject the timesheet **(this should be a last resort).** Payroll will follow up on any rejected timesheet with both the employee and the supervisor.

Situation #3 - You have approved a timesheet before the employee has "signed" it with Submit for Approval.

Solution -Access the timesheet and click "Unapprove."

Situation #4 - Your employee has not started a timesheet in Self-Service.

Solution A – If the employee has worked during that time period, reject their empty timesheet. This rejection will show that you as the supervisor have tried to the best of your ability to submit a completed timesheet for that employee but could not. This rejection is also a red flag to payroll. Payroll will follow up with both you and the employee.

Solution B – If the employee has NOT worked during that time period, no action is needed (do not reject, do not approve.)

Situation #5 - Employee has entered hours and/or leave types that you do not agree with.

Solution - Reject the submitted time and have the employee correct the errors before resubmitting it.

Remember, the monthly submitted timesheet becomes a legal document.

NOTIFICATIONS

Several notifications happen as timesheets are managed by employees and supervisors.

1. Timesheet Submitted—This notification tells you that the employee submitted their timesheet and which week of the pay period they submitted.



 Timesheet Has Been Unsubmitted—This notification tells you that an employee has decided to make edits to a submitted timesheet. You <u>should not</u> take any action on this timesheet until you receive another notification that they re-submitted it.



Employees receive the following notifications as you apply decisions to their timesheets.

1. Timesheet Approved—This means the timesheet is ready for payroll to process it.

Timesheet Approved



Your timesheet for 08/24/2020- 08/29/2020 for position

has been approved.

2. Timesheet Rejected—means that the specified timesheet needs to be corrected. The employee needs to sign back into Self Service, open the timesheet for the rejected week, and make corrections.



3. Timesheet No Longer Approved—The timesheet moved from the approved status to the unapproved status. If the employee did not ask you to do this, please work with them to ensure their timesheet is completed prior to the deadline.



4. Timesheet No Longer Rejected—The timesheet moved from a rejected status to an unrejected status. This means the timesheet is neither rejected nor approved, please work with your employee to ensure their timesheet is completed prior to the deadline.

Timesheet No Longer Rejected



Your previously rejected timesheet for 08/24/2020-08/29/2020 for position is no longer rejected.

If you have not already done so, please reach out to your supervisor to ensure your timesheet is approved before the deadline.

EMPLOYEES WITH MULTIPLE POSITIONS

An employee will occasionally have multiple positions. In Self Service, supervisors can now see the hours reported for both positions but can only apply decisions for the position that reports to them.

Having a view of the other position allows you to ensure that the employee is not trying to double book their hours or recognize when an overtime situation may have occurred. You need to coordinate with the Business Office and the employee's other supervisor(s) if issues or questions come up with their timesheets.

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EMPLOYEE PROXY

There may be a time when you are unable to apply decisions to timesheets before the deadline. When you know this will or may happen you can assign a proxy user to act on your behalf. **The Alternate Supervisor from WebAdvisor no longer works so you need to specify a proxy any time this is likely to occur.**

The proxy should be your supervisor, another Vice President, or someone pre-approved by Human Resources, it should NOT be an employee you supervise or an administrative assistant.

1. From the "Employee" menu, select "Employee Proxy."



Time approval for Supervisors

2. Click on "Add Time Approval Proxy"



3. Enter the name of the employee you would like to serve as your proxy and then hit enter or click the magnifying glass to search for them.

Add Time Approval Proxy	
Employee Search	
mickey mouse	Q
Cancel	Add Proxy

- 4. A list of potential employees will appear.
 - a. Highlight the employee by clicking on them.
 - b. Click "Add Proxy" to complete the change.

	Q
100456	
Mickey Mouse	

5. The employee will appear in your proxy list and receive an email that they have been granted proxy access.

Add Proxy				
Emailure	Provy Access	effective three	End Date	
	Time Approval	WINDERS -		0
+ Add Time Approval Prov				
You now have	employee proxy access for	a	t The College of	Idaho.
E ellucian@	♀collegeofidaho.edu			
You have been grant	ed employee proxy access to	at The College of Ida	aho.	

6. When the need ends to have a proxy, you can remove the proxy's access by returning to the "Employee Proxy" form and clicking on the "X" icon on their row.

Employee Proxy				
Add Proxy				
traityee	Prony Automa	Effective Outer	21st Dute	
	Three Appropriate	962862010		0
+ Add Time Approval Proxy				
	© 2000 7001 than	an Company LP, and its affiliates will rights yoursed. <u>Privacy</u>		

7. A message will appear confirming the change, and the individual will no longer show as a proxy.



Acting as a Proxy

- 1. If you are assigned as a proxy you will be asked which account to use whenever you sign into Self Service.
 - a. Select the account you would like to access.
 - b. Click "Continue."

If you should no longer be a proxy, contact the person and ask them to remove your proxy access.

Person Proxy	
welcome to Self Service. Select the person's account	you want to view:
	You
	A
Cancel	Continue

2. You will only have access to the "Employee" menu.

	acting on behalf of Change User
Hello, Choose a c	welcome to Self Service. Tategory to get started.
	Employee View your tax form consents, earnings statements, banking information, timesheets and leave balances.
	© 2000-2020 Ellucian Company L.P. and its affiliates. All rights reserved. Pr

3. From the Employee menu you will be sent directly to "Time Approval."

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	Daugelijke									
Desired Clinical 199	Approve									
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4. Follow the regular supervisor process to approve or reject timesheets as appropriate. Time approval for Supervisors 14

VERSION CONTROL

Version Modified by	Modification Date	Description
Jaymalee Johnson	10/12/2020	
Nancy Johnson-Cassulo	10/16/2020	
Jaymalee Johnson	11/5/2020	
Jaymalee Johnson	12/11/2020	
Keith Bower	12/11/2020	Added Header Styles and Table of Contents