

# **Banner Approver Training**

# Approver Training

## *Objectives*

- Understand functions of Web Time Entry
- Understand employee responsibilities
- Understand approver responsibilities and procedures
- Prepare to train web time entry users

# Approver Training

## *Resources*

- Banner Training links located on HR webpage under Training & Development
- Presentations
  - Web Time Entry
  - Web Overtime Reporting
  - Web Leave Reporting
- Tegrity Demonstrations
- Quick Reference Guides and FAQs

# Approver Training

## *Functionality*

- Web Time Entry will communicate time and leave to the HR Department
- It will take the place of paper time sheets, leave reports, and overtime reports
- It is the documentation required to create paychecks and update leave balances

# Approver Training

## *Employee Responsibilities*

Employee Classification	Web Time Entry	Web Leave Reporting	Pay Frequency
FT Exempt	No	Yes	Monthly
FT Non-Exempt	No	Yes: Leave and OT	Monthly
PT Staff	Yes	No	Semi-Monthly
PT Faculty	Some*	No*	Semi-Monthly
Student Worker	Yes	No	Semi-Monthly

**\* PT Faculty:**

- Web Time Entry: If PT Faculty currently submit a time sheet they will use Web Time Entry. If they are paid from the PT Faculty Pay Schedule, they will not use Web Time Entry.
- Web Leave Reporting: PT Faculty will submit Paper time sheets to report sick leave.

# Approver Training

## *Exceptions*

- These FT employees may use Web Time Entry
  - FT employees with occasional PT job
  - Department Head summer work
  - FT Faculty summer committee work

# Approver Training

## *Exceptions*

- These PT positions will not use Web Time Entry
  - Game Workers
  - Test Proctors
  - Substitutes

# Banner Web Time Entry

Please view separate Web Time Entry presentation for details of time sheet entry.



# WEB TIME ENTRY

## Position Selection

**Personal Information** **Student** **Employee**

Search

### Time Sheet Selection

---

Make a selection from My Choice. Choose a Time Sheet period from the pull-down list. Select Time Sheet.

Title and Department	My Choice	Pay Period and Status
Payroll Coordinator, PT9913-00 Human Resources, 10602	<input checked="" type="radio"/>	Oct 16, 2016 to Oct 29, 2016 Not Started ▼

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- Choose a position by clicking the selection button under 'My Choice'. Some employees may have more than one position.
- By default, the "Pay Period and Status" box will display the current pay period.
- Select the drop down menu to display other pay periods. The status must be 'not started' or 'in progress' to enter time.
- Once you've made your choices click the TIME SHEET button.

Here you will see your position title and number, and your home department and organization code.

# Approver Training

## Position Selection

### Title and Department

Payroll Coordinator, PT9913-00  
Human Resources, 10602



- Position Title
- Position Number
- Position Department
- Home Organization (FOAP)

Position Number Prefix	Description
<b>F</b>	<b>Faculty</b>
FS	PT Faculty Salary
<b>FH</b>	<b>PT Faculty Hourly</b>
FA	Faculty Additional (Overloads)
<b>P</b>	<b>Professional (Staff)</b>
<b>PT</b>	<b>PT Professional</b>
PA	Professional Additional (Game workers)
<b>S</b>	<b>Student Worker</b>
<b>SF</b>	<b>Student Worker – Federal Work Study</b>

# WEB TIME ENTRY

## *Time Sheet Dispositions*

Pay Period and Status
Oct 16, 2016 to Oct 29, 2016 (Not Started) ▼

- The time sheet period will display different dispositions / statuses that are important in starting and completing your web time entry process.
- **Not Started** – you have not started your time sheet
- **In Progress** – you are in the process of entering your time for the pay period
- **Pending** – you submitted your time sheet and it is awaiting approval from your supervisor
- **Returned for Correction** – your time sheet is being returned to you for correction; make corrections and resubmit
- **Approved** – your time sheet has been approved and is ready for payroll to process
- **Completed** – payroll received and processed your time sheet

# WEB TIME ENTRY

## *Time Sheet Deadline Calendar*

### 2017 Time Sheet Deadlines

Payroll Period Dates	Time Sheet Deadline to Submit to Approver	Approver Deadline	PayDate
12/18/2016 thru 12/31/2016	01/03/2017 by 12:00 p.m.	01/06/2017 by 5:00 p.m.	1/13/2017
01/01/2017 thru 01/21/2017	01/24/2017 by 12:00 p.m.	01/27/2017 by 5:00 p.m.	1/31/2017
01/22/2017 thru 02/04/2017	02/07/2017 by 12:00 p.m.	02/10/2017 by 5:00 p.m.	2/15/2017
02/05/2017 thru 02/18/2017	02/21/2017 by 12:00 p.m.	02/24/2017 by 5:00 p.m.	2/28/2017
02/19/2017 thru 03/04/2017	03/07/2017 by 12:00 p.m.	03/10/2017 by 5:00 p.m.	3/15/2017
03/05/2017 thru 03/18/2017	03/21/2017 by 12:00 p.m.	03/24/2017 by 5:00 p.m.	3/31/2017
03/19/2017 thru 04/01/2017	04/04/2017 by 12:00 p.m.	04/07/2017 by 5:00 p.m.	4/13/2017
04/02/2017 thru 04/15/2017	04/17/2017 by 12:00 p.m.	04/21/2017 by 5:00 p.m.	4/28/2017
04/16/2017 thru 04/29/2017	05/02/2017 by 12:00 p.m.	05/05/2017 by 5:00 p.m.	5/15/2017

# WEB TIME ENTRY

## *Submit for Approval*

- **IMPORTANT**

- Your hours can only be added, edited and/or changed within the current pay period and before the approval process has been completed
- Refer to the Banner Resource Links for the Time Sheet Deadline Calendar
- Make sure your hours are correct before you submit your time sheet for approval
- Submission of hours counts as your electronic signature. Fraudulent reporting of hours may be grounds for disciplinary action.
- If you have no hours to report, do not submit a time sheet

# Banner Leave Reporting

Please view separate Leave Reporting presentation for details of Leave Report entry.

# Web Leave Reporting

## *What Is It?*

- The new method to be used to communicate full-time, employees' leave to the Human Resources office
- It will replace the paper leave reports
- It is the documentation required to update your leave balances
- It is not a request form. Leave should be requested and approved by your supervisor before it can be taken.

# Approver Training

## *Leave Request Process*

- Supervisor responsibility to collect leave requests and approve them
- You should continue to use the existing leave request form but it should not be submitted to HR
- Leave can only be entered in Banner during the current month
- Sick leave:
  - Notify HR if employee is out more than 3 consecutive days
  - Doctor's notes should be forwarded to HR in a sealed envelope



# WEB LEAVE REPORTING

## Leave Balances

Personal Information Student **Employee**

Search   [RETURN TO MENU](#) [SITE MAP](#) [HELP](#) [EXIT](#)

### Leave Balances

Select the link under the Type of Leave column to access detailed information.

**List of Leave Types**

TYPE of Leave	Hours or Days Available	Beginning Balance	Earned as of Nov 14, 2016	Taken as of Nov 14, 2016	Available Balance as of Nov 14, 2016
<a href="#">Discretionary Leave</a>	Hours	40.00	.00	.00	40.00
<a href="#">Overage Leave</a>	Hours	.00	.00	.00	.00
<a href="#">Overtime Account</a>	Hours	.00	.00	.00	.00
<a href="#">Personal Leave</a>	Hours	16.00	.00	.00	16.00
<a href="#">Sick Leave</a>	Hours	341.00	341.00	.00	373.00
<a href="#">Vacation Leave</a>	Hours	96.00	.00	.00	96.00

[Click on Leave Type for details](#) [\[ Pay Stub \]](#)

- It is each employee's responsibility to manage their own leave balance
- Entry of leave in excess of an available balance may result in reduction of paycheck amount
- Per Blinn Policy, leave (vacation, discretionary, personal) is credited at the start of the fiscal year, but it earned monthly. If an employee leaves Blinn during the year they will only be paid out for what has been earned. And if they have used more than they have earned, their final paycheck will be reduced.

# WEB LEAVE REPORTING

## *Leave Report Calendar*

### 2017 Leave Report Deadlines

Leave Report Period	Leave Report Deadline to Submit to Approver	Approver Deadline
01/01/2017 thru 01/31/2017	02/05/2017 by 12:00 p.m.	02/07/2017 by 5:00 p.m.
02/01/2017 thru 02/28/2017	03/05/2017 by 12:00 p.m.	03/07/2017 by 5:00 p.m.
03/01/2017 thru 03/31/2017	04/05/2017 by 12:00 p.m.	04/07/2017 by 5:00 p.m.
04/01/2017 thru 04/30/2017	05/05/2017 by 12:00 p.m.	05/07/2017 by 5:00 p.m.
05/01/2017 thru 05/31/2017	06/05/2017 by 12:00 p.m.	06/07/2017 by 5:00 p.m.
06/01/2017 thru 06/30/2017	07/05/2017 by 12:00 p.m.	07/07/2017 by 5:00 p.m.
07/01/2017 thru 07/31/2017	08/05/2017 by 12:00 p.m.	08/07/2017 by 5:00 p.m.

# WEB LEAVE REPORTING

## *Important Information*

- Your hours can only be added, edited and/or changed within the current leave report period and before the approval process has been completed.
- Refer to the Banner Resource Links for the Leave Report Deadline Calendar
- Make sure all of your leave entries are correct for the entire month before you submit your leave report for approval.
- Submission of hours counts as your electronic signature. Fraudulent reporting of hours may be grounds for disciplinary action.
- Overage of leave will be tracked and reduced from paycheck
- If you don't take any leave during the current month, you do not need to submit a leave report

# Banner Overtime Reporting

Please view separate Overtime Reporting presentation for details of Overtime entry on the Leave Report.

# Web Overtime Reporting

## *What Is It?*

- The new method to be used to communicate any overtime of full-time, non-exempt employees to the Human Resources and Payroll office
- It will replace the paper overtime reports
- It is the documentation required to compensate employees for overtime worked
- REMINDER: Overtime must be approved in advance by your supervisor and VP

# WEB OVERTIME REPORTING

## *Important Information*

- Once your leave report has been submitted and approved by your supervisor, HR will review leave and overtime and determine the rate at which it is owed. An employee must physically work more than 40 hours in one week to be paid time and a half for overtime.
- Overtime will be paid to you on the following paycheck after it has been received
- Overtime hours may not be banked to use as comp time
- REMINDER: Overtime must be approved in advance by your supervisor and VP

# Banner Approver Functions

# Approver Training

## *Responsibilities*

- An approver is responsible for ensuring that all of their employees submit their time worked or leave taken for the pay or leave period
- Each time sheet or leave report should be reviewed in detail making sure that the time submitted is correct
- The time or leave should be approved prior to deadlines
- Approval of time sheets and leave reports represents your electronic signature. Fraudulent reporting of hours may be grounds for disciplinary action.



# Approver Training

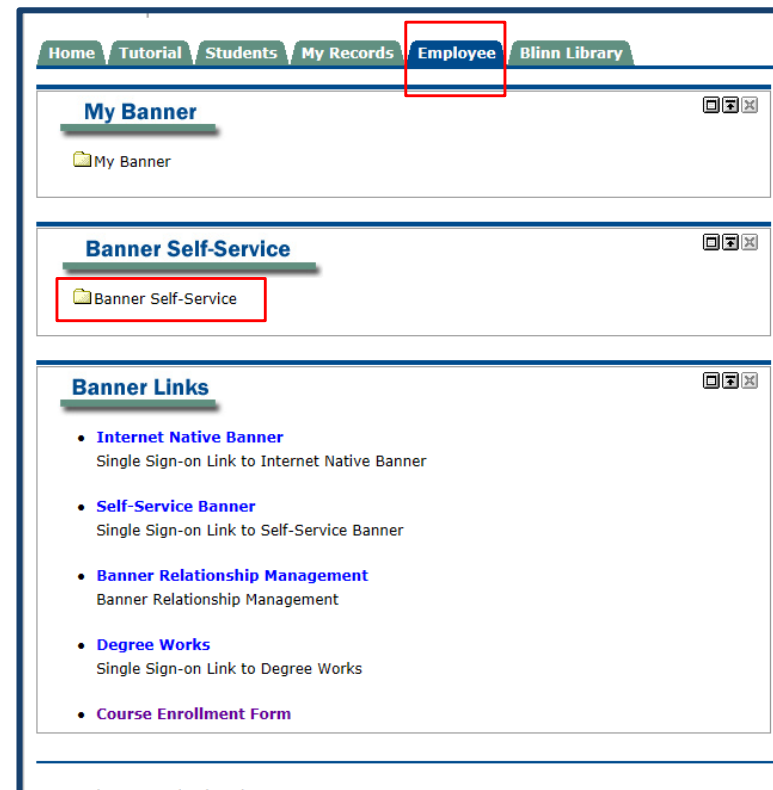
## Logging In



The screenshot shows the myBLINN logo with the tagline "Stay Connected!". Below the logo is a "Secure Access Login" section containing two input fields: "User Name:" and "Password:". Below these fields are "Login" and "Cancel" buttons. At the bottom of the login section is a link for "Browser Information". Below the login section are two links: "Forgot Password?" and "Questions?".

- From Blinn's Homepage click on the MyBlinn link
- Enter your network User Name and Password into the Secure Access Login

- Select the Employee Tab
- Open the Banner Self-Service Folder



The screenshot shows the myBLINN interface with the "Employee" tab selected and highlighted with a red box. The interface includes a navigation bar with tabs: Home, Tutorial, Students, My Records, Employee, and Blinn Library. Below the navigation bar are three main sections: "My Banner" with a folder icon and the text "My Banner"; "Banner Self-Service" with a folder icon and the text "Banner Self-Service" (highlighted with a red box); and "Banner Links" with a list of links: "Internet Native Banner" (Single Sign-on Link to Internet Native Banner), "Self-Service Banner" (Single Sign-on Link to Self-Service Banner), "Banner Relationship Management" (Banner Relationship Management), "Degree Works" (Single Sign-on Link to Degree Works), and "Course Enrollment Form".

# Approver Training

## Logging In

**Personal Information** **Faculty Services** **Employee**

Search

### Time Reporting Selection

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Selection Criteria

**My Choice**

Access my Time Sheet:

Access my Leave Report:

Access my Leave Request:

Approve or Acknowledge Time:

Approve All Departments:

Act as Proxy:

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# Approver Training

## Selection

Personal Information Faculty Services **Employee**

Search

### Approver Selection

---

**Time Sheet**

Department and Description	My Choice	Pay Period
1, 10602, Human Resources	<input checked="" type="radio"/>	SM, Oct 30, 2016 to Nov 19, 2016 ▼

**Leave Report**

Department and Description	My Choice	Leave Period
1, 10602, Human Resources	<input type="radio"/>	MN, Nov 01, 2016 to Nov 30, 2016 ▼

Sort Order

**My Choice**

Sort employees' records by Status then by Name:

Sort employees' records by Name:

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- If you have employees submitting Time Sheets and Leave Reports, you will select which one to view.
- Select appropriate pay or leave period
- Choose sort order view

# Approver Training

## Time Entry

Personal Information Faculty Services **Employee**

Search   SITE MAP HELP EXIT

### Department Summary

Select the employee's name to access additional details.

COA: 1, Blinn College  
 Department: 10602, Human Resources  
 Pay Period: Oct 30, 2016 to Nov 19, 2016  
 Act as Proxy: Not Applicable  
 Pay Period Time Entry Status: Open until Nov 28, 2016, 05:00 PM

- The time sheet MUST be approved by the date in the Pay Period Time Entry Status field
- Do not use the Select All, Approve or FYI function. This does not give you the opportunity to review each record

Pending									
ID	Name, Position and Title	Required Action	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Cancel	Other Information
B00259434	<a href="#">Student Worker Test 1</a> SF9897 - 00 Student Worker FWS	Approve	27.00	.00		<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Change Time Record</a> <a href="#">Leave Balance</a>

In Progress									
ID	Name, Position and Title	Total Units	Cancel	Other Information					
B00142402	<a href="#">PT Staff Test 1</a> PT9846 - 00 PT Support 3	0	.00	<a href="#">Comments</a> <a href="#">Leave Balance</a>					
B00461782	<a href="#">Student Worker Test 2</a> SF9897 - 01 Student Worker FWS	32.00	.00	<a href="#">Leave Balances</a>					

Not Started		
ID	Name, Position and Title	Other Information

Select the name of the employee you want to review

# Approver Training

## Time Entry

Select Next or Previous to access another employee.

**Employee ID and Name:** B00259434 Student Worker Test 1  
**Title:** SF9897-00 Student Worker FWS  
**Department and Description:** 1 10602 Human Resources  
**Transaction Status:** Pending

[Routing Queue](#) | [Account Distribution](#)

### Time Sheet

Earnings	Shift	Special Rate	Total Hours	Total Units	Sunday, Oct 30, 2016	Monday, Oct 31, 2016	Tuesday, Nov 01, 2016	Wednesday, Nov 02, 2016	Thursday, Nov 03, 2016	Friday, Nov 04, 2016	Saturday, Nov 05, 2016	Sunday, Nov 06, 2016	Monday, Nov 07, 2016	Tuesday, Nov 08, 2016	Wednesday, Nov 09, 2016	Thursday, Nov 10, 2016	Friday, Nov 11, 2016	Saturday, Nov 12, 2016	Sunday, Nov 13, 2016	Monday, Nov 14, 2016	Tuesday, Nov 15, 2016	Wednesday, Nov 16, 2016	Thursday, Nov 17, 2016	Friday, Nov 18, 2016	Saturday, Nov 19, 2016	Sunday, Nov 20, 2016
Federal Workstudy Pay	1		27				6		6	4			3.5		4		3.5									
<b>Total Hours:</b>			27				6		6	4			3.5		4		3.5									
<b>Total Units:</b>				0																						

### Time In and Out

Earnings	Sunday, Oct 30, 2016	Monday, Oct 31, 2016	Tuesday, Nov 01, 2016	Wednesday, Nov 02, 2016	Thursday, Nov 03, 2016	Friday, Nov 04, 2016	Saturday, Nov 05, 2016	Sunday, Nov 06, 2016	Monday, Nov 07, 2016	Tuesday, Nov 08, 2016	Wednesday, Nov 09, 2016	Thursday, Nov 10, 2016	Friday, Nov 11, 2016	Saturday, Nov 12, 2016	Sunday, Nov 13, 2016	Monday, Nov 14, 2016	Tuesday, Nov 15, 2016	Wednesday, Nov 16, 2016	Thursday, Nov 17, 2016	Friday, Nov 18, 2016	Saturday, Nov 19, 2016	Sunday, Nov 20, 2016				
Federal Workstudy Pay			09:00AM 03:00PM	09:00AM 03:00PM	09:00AM 01:00PM			01:00PM 04:30PM			01:00PM 05:00PM		08:30AM 12:00PM													

### Routing Queue

Name	Action and Date
Student Worker Test 1	Originated Nov 13, 2016 04:56 pm
Student Worker Test 1	Submitted Nov 13, 2016 04:58 pm
Supervisor Test 1	Pending

### Account Distribution Default Data

Pay Period Effective Date	Percent	Index	Fund	Organization	Account	Program	Activity	Location	Project Type
Oct 30, 2016		100.00	11000	10602	62013	602			

[Time Sheet](#) | [Routing Queue](#) | [Account Distribution](#)

# Approver Training

## *Time Entry*

Previous Menu

Approve

Return for Correction

Change Record

Delete

Add Comment

Next

OPTION	ACTION
Previous Menu	Returns to previous screen
Approve	Approve the time sheet
Return for Correction	Returns to employee (Note: add comment first)
Change Record	Edit time sheet
Delete	Deletes entire time sheet. Employee must start over.
Add Comment	Add comment to time sheet for employee
Next	Move to next employee record

# Approver Training


## Add Comment

Personal Information Faculty Services **Employee**

Search

### Comments

---

 Enter or edit comments until you submit the record for approval. Mark the Comment Confidential indicator to retain confidentiality.

Employee: Student Worker Test 1, B00259434  
Pay Period: Oct 30, 2016 to Nov 19, 2016

**Made By:** Supervisor Test 1  
**Comment Date:** Nov 14, 2016  
**Confidential Indicator:**   
**Enter or Edit Comment:**

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Enter comment for employee before returning for correction. Enter comment and click Save.

# Approver Training

## *Return for Correction*

- Things to consider before returning a time sheet for correction:
  - Allow adequate time for the employee to make changes to his/her record prior to the employee submit by date.
  - Add a comment and notify the employee if you have returned the time sheet for correction
  - The employee WILL NOT BE electronically or automatically notified that the time sheet has been returned for correction
  - If an error is discovered after the employee deadline, the approver must change the record



# Approver Training

## *Change Record*

- Things to consider before changing a record:
  - If there is not adequate time to return the time sheet to the employee, the approver may change the record.
  - Add a comment to the time sheet and notify the employee if you have changed the record

# Approver Training

## *What if...*

- What if...The time sheet is not approved before the submission date?
  - Contact HR immediately!
  - If the time was not submitted at all it will be necessary to complete a late time sheet. This should be a rare occurrence and may require VP signature.
- What if...There is an error discovered after the time sheet has been approved?
  - Contact HR immediately!

**DON'T KEEP AN EMPLOYEE FROM RECEIVING HIS/HER PAYCHECK!**

# Approver Training

## Leave Report

Personal Information Faculty Services **Employee**

Search   SITE MAP HELP EXIT

### Department Summary

Select the employee's name to access additional details.

**COA:** 1, Blinn College  
**Department:** 10602, Human Resources  
**Leave Period:** Nov 01, 2016 to Nov 30, 2016  
**Act as Proxy:** Not Applicable  
**Leave Period Leave Entry Status:** Open until Dec 07, 2016, 05:00 PM

Pending										
ID	Name, Position and Title	Required Action	Total Days	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Cancel	Other Information
B00267670	<a href="#">FT Non Exempt Test 1</a> P99569 - 00 Specialist 3	Approve	.00	10.00	.00		<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Change Leave Record</a> <a href="#">Leave Balance</a> <a href="#">Warning</a>

**Not Started**

ID	Name, Position	Other Information
----	----------------	-------------------

- The leave report MUST be approved by the date in the Leave Period Time Entry Status field
- Do not use the Select All, Approve or FYI function. This does not give you the opportunity to review each record

Select the name of the employee you want to review

# Approver Training

## Leave Report

<input type="button" value="Change Selection"/> <input type="button" value="Select All, Approve or FYI"/> <input type="button" value="Reset"/> <input type="button" value="Save"/>										
Pending										
ID	Name, Position and Title	Required Action	Total Days	Total Hours	Total Units	Queue Status	Approve or FYI	Return for Correction	Cancel	Other Information
B00267670	<a href="#">FT Non Exempt Test 1</a> P99569 - 00 Specialist 3	Approve	.00	10.00	.00		<input type="checkbox"/>	<input type="checkbox"/>		<a href="#">Change Leave Record</a> <a href="#">Leave Balance</a> <a href="#">Warning</a>
Not Started										
ID	Name, Position and Title	Other Information								

**⚠ Possible Insufficient Leave Balance for Report Overtime.**

<b>Employee ID and Name:</b>	B00267670 FT Non Exempt Test 1	<b>Department and Description:</b>	1 10602 Human Resources
<b>Title:</b>	P99569-00 Specialist 3	<b>Transaction Status:</b>	Pending

# Approver Training

## Leave Report

**⚠ Possible Insufficient Leave Balance for Report Overtime.**

**Employee ID and Name:** B00267670 FT Non Exempt Test 1  
**Title:** P99569-00 Specialist 3

**Department and Description:** 1 10602 Human Resources  
**Transaction Status:** Pending

[Leave Balances](#) | [Routing Queue](#)

### Leave Report

Earnings	Total Hours	Total Units	Tuesday, Nov 01, 2016	Wednesday, Nov 02, 2016	Thursday, Nov 03, 2016	Friday, Nov 04, 2016	Saturday, Nov 05, 2016	Sunday, Nov 06, 2016	Monday, Nov 07, 2016	Tuesday, Nov 08, 2016	Wednesday, Nov 09, 2016	Thursday, Nov 10, 2016	Friday, Nov 11, 2016	Saturday, Nov 12, 2016	Sunday, Nov 13, 2016	Monday, Nov 14, 2016	Tuesday, Nov 15, 2016	Wednesday, Nov 16, 2016	Thursday, Nov 17, 2016	Friday, Nov 18, 2016	Saturday, Nov 19, 2016	Sunday, Nov 20, 2016
Discretionary Time	8		8																			
Report Overtime	2											2										
<b>Total Hours:</b>	10		8									2										
<b>Total Units:</b>		0																				

### Leave Balances as of Nov 14, 2016

Type of Leave	Hours or Days	Banked Date Available	Available Beginning Balance	Earned	Taken	Available Balance
Discretionary Leave	Hours	0 Sep 01, 2016	40	0	0	40
Overage Leave	Hours	0 Sep 01, 2016	0	0	0	0
Overtime Account	Hours	0 Sep 01, 2016	0	0	0	0
Personal Leave	Hours	0 Sep 01, 2016	16	0	0	16
Sick Leave	Hours	0 Sep 01, 2016	200	0	0	200
Vacation Leave	Hours	0 Sep 01, 2016	96	0	0	96

### Routing Queue

Name	Action and Date
FT Non Exempt Test 1	Originated Nov 08, 2016 04:44 pm
FT Non Exempt Test 1	Submitted Nov 13, 2016 05:37 pm
Supervisor Test 1	Pending

# Approver Training

## *Leave Report*

Previous Menu

Approve

Return for Correction

Change Record

Delete

Add Comment

Next

OPTION	ACTION
Previous Menu	Returns to previous screen
Approve	Approve the leave report
Return for Correction	Returns to employee (Note: add comment first)
Change Record	Edit leave report
Delete	Deletes entire leave report. Employee must start over.
Add Comment	Add comment to leave report for employee
Next	Move to next employee record

# Approver Training

## *What if...*

- What if...The leave report is not approved before the submission date?
  - Contact HR immediately!
  - If the leave was not submitted at all it will be necessary to complete a late leave form. This should be a rare occurrence and may require VP signature.
- What if...There is an error discovered after the leave report has been approved?
  - Contact HR immediately!

Once the Leave Report is approved, the employee's leave balances are immediately adjusted.

# Approver Training

## *Designating a Proxy*

- A Proxy is an individual designated by the Approver in the system to act on their behalf to update, change, return, or approve the time sheet and/or leave report submitted by their employee.
- An approver should designate a proxy to perform the approver responsibilities in their absence
- The proxy must be a full time employee within the same department/division who is able to verify the employee's time and leave submissions.
- Remember that an employee should NEVER approve their own time sheet or leave report.



# Approver Training

## Designating a Proxy

Personal Information Faculty Services **Employee**

Search

Time Reporting Selection

---

Selection Criteria

**My Choice**

Access my Time Sheet:

Access my Leave Report:

Access my Leave Request:

Approve or Acknowledge Time:

Approve All Departments:

Act as Proxy:

[Proxy Set Up](#)

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- Select Proxy Set Up from the selection screen
- Then use the drop down menu to choose the name of the person who will be your Proxy. The list is alphabetical by last name.
- Click the ADD check box and SAVE.
- Repeat the steps to add an additional proxy, or click REMOVE check box to remove an existing proxy
- Click Reporting Selection to return to the previous screen

Proxy Set Up

---

Name	Add	Remove
Sara Jane Pohl, SPOHL	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text" value="Elaine Davis Abshire, EABSHIRE"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Leave Reporting Selection](#)

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# Approver Training

## *Acting as a Proxy*

- If you have been designated as a Proxy for an approver, you will assume the roll as the 'Acting Approver' when they are unable
- Remember that an employee should NEVER approve their own time sheet or leave report.

Personal Information Faculty Services Employee

Search  Go

### Time Reporting Selection

---

Selection Criteria

My Choice

Access my Time Sheet:

Access my Leave Report:

Access my Leave Request:

Approve or Acknowledge Time:

Approve All Departments:

Act as Proxy:

Select

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- From the selection screen select the drop down box under Act as Proxy
- Select the name of the person for whom you are approving time or leave. If you do not see the approver's name, the approver has not designated you as their proxy. Contact to approver to set up proxy.
- After selecting the approver name click Select
- You may now view and approve time sheets and leave reports as the 'Acting Approver'

A designated Proxy must have completed the Approver Training before acting as a proxy.

# Approver Training

## *Other Banner Facts*

- Electronic W2 and 1095C Consent (2017)
- Direct Deposit options
- Banner Self-Service Options
  - Check Stub, leave, job information and history
  - Tax statements beginning in 2018
- EPAF (Electronic Personnel Action Forms)

# Approver Training

QUESTIONS?