LEAVE REPORTING (LR)
for Faculty and Administrators
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Overview

Objectives
Welcome to Leave Reporting (LR) Training. The objectives of this training course are to:
- Introduce Leave Reporting
- Identify basic navigation of a leave report
- Describe how to enter and submit monthly leave usage

Intended Audience

University Faculty and Administrators
LR Introduction

The implementation of LR enables Faculty and Administrators to report their leave taken via the PipelineMT Portal Web site through Employee Self Service. Employee Self Service is available 24 hours a day, seven days a week, 365 days a year. LR is a module of the Banner Human Resource administrative system used by the University.

The LR system is used to report approved leave taken each month to Human Resource Services. The departments’ internal procedures for requesting and approving leave should remain in place.

Middle Tennessee State University faculty and administrators enter leave taken on Web-based leave reports. There are a number of user roles and leave report transaction statuses that are used in the LR module.

User Roles

Users may be assigned more than one role in the Leave Reporting Process.

Originator
The originator is the creator of the leave report. Once an originator opens a leave report, its status changes from Not Started to In Progress. Only the originator can enter leave and submit that In Progress leave report for approval. If the originator is unable to complete their leave report they should notify their supervisor. The supervisor will need to work with Human Resources in order to complete the leave process for the employee.

The originator can make changes to the leave report while the report is In Progress, Returned for Correction or Error status. The originator may not make changes after the report has been submitted for approval.

Approver
Approvers are typically the head of a department or head of a unit within a department. Approvers have the ability to modify, return, and/or approve leave reports submitted by the originator. An approver’s action is required for the leave report to be processed through the system. Should an approver return or modify an employee’s leave report, the approver must promptly notify the employee of those changes.

Proxy
A proxy is someone who can act on another person’s behalf to approve or access a leave report. Human Resources will be establishing pre-defined proxies within the department/unit based on the organizational structure. All approvers will have their immediate supervisor as a proxy. A list of the pre-defined proxies will be made available.

Department/Unit heads (approvers) may appoint an individual within their area as the proxy for leave reporting. Users with a proxy role in Leave Reporting have the ability to act, and assume all privileges, for another person for approval of leave. These proxies can only be assigned via a request form submitted to Human Resources, which can be found on the Web at http://hrs.web.mtsu.edu/forms/2008_ProxyAuthorization.pdf
Transaction Status

A leave report is assigned a status as it progresses through the LR process. Possible statuses are:

**Not started:** The leave report has not been opened for the pay period.

**In Progress:** The leave report has been opened for the pay period.

**Pending:** The leave report has been submitted for approval.

**Error/Warnings:** The leave report will show a warning message for hours entered or hours listed under earnings codes that do not accrue leave (i.e. military leave, jury leave, bereavement, etc.). Reports can also appear in error or warning status if the employee does not have enough annual or sick leave to cover the hours entered or if a leave report is submitted for approval with zero hours entered. Any reports in error or warning status should be carefully reviewed to ensure that leave has been entered correctly.

**Returned For Correction:** The leave report has been returned for correction by the approver to the originator. The necessary corrections must be made and the leave report must be resubmitted before the **Submit by Date** that appears on the leave report.

**Approver:** Once leave is approved by the department/unit head it will be submitted to Human Resource Services for final processing.

**Completed:** A leave report in **Completed** status has been successfully approved by HRS and any reported leave usage has been deducted from appropriate leave balances.
PipelineMT Introduction

The PipelineMT Portal Web site is [http://mtsu36.mtsu.edu/cp/home/login](http://mtsu36.mtsu.edu/cp/home/login). Login to PipelineMT using your Username and Password. The username and password required to enter the Portal are the same username and password you use to login to your University e-mail. When logging in, keep in mind that your login is case sensitive. If you have trouble logging in, contact the ITD Helpdesk at (615)898-5345.

After successfully logging in, look for the tab marked RaiderNet

Click on the RaiderNet tab and look for a tab called Employee. When you click on the Employee tab this link will take you to another channel where you will find links pertaining to your employee information: Time Sheet (for student/hourly employees), Leave Report (for faculty and administrative), Benefits and Deductions, Leave Balances, Pay Information, Federal Income Tax Information, and Jobs Summary.
Employee

Time Sheet
Leave Report

Benefits and Deductions
- Insurances
- ORP and TCRS Benefits
- 401k, 403b and 457 Plans
- Miscellaneous Benefits and Charitable Givings
- Benefit Statements
- Annual Transfer and Enrollment Period

Leave Balances
Pay Information
- Direct Deposit Allocation
- Earnings and Deductions History
- Pay Stubs

Federal Income Tax Information
- W4 Exemptions and Allowances
- W2 Year End Earnings Statements

Jobs Summary
Locating Your Leave Report

If an employee has leave to report for the month, they should start their leave report. If an employee does not have any leave to report for the month, the leave report does not have to be started.

To start a leave report the employee must enter the Leave Reporting channel by click on the Leave Report link.

CAUTION: Do not use the back button when navigating in the leave reporting module as you may receive an error message.

Faculty and administrators will only use the Leave Report option to report their leave. If the Time Sheet option is accidentally selected an error message will appear stating you do not have any available records. In order to return to the Employee menu you should click on the Employee Tab which will allow you to make the correct selection.

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

You have no records available at this time. Please contact your Payroll Administrator if you have any questions.
**Monthly Leave Reporting**

**Time Reporting Selection Screen**

Individuals who have the role of approver or proxy will encounter the Time Reporting Selection Screen. This screen requires you to tell the system what you want to do, such as accessing your leave report, or assessing your leave request (not a valid option at this time), or accessing leave reports for approval. Individuals who do not have any of these roles in the LR module will not encounter this screen but will be directed to the Leave Report Selection Screen.

If you are directed to this screen to access your Leave Report (to enter leave usage), select the Access my Leave Report button and click **Select**.

**Time Reporting Selection**

**Selection Criteria**

<table>
<thead>
<tr>
<th>Selection Criteria</th>
<th>My Choice</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access my Time Sheet:</td>
<td></td>
</tr>
<tr>
<td>Access my Leave Report:</td>
<td>✔</td>
</tr>
<tr>
<td>Access my Leave Request:</td>
<td></td>
</tr>
<tr>
<td>Approve or Acknowledge Time:</td>
<td></td>
</tr>
<tr>
<td>Act as Proxy:</td>
<td>Self</td>
</tr>
<tr>
<td>Act as Superuser:</td>
<td></td>
</tr>
</tbody>
</table>

Select this option to access leave report.

Once you click **select** this will open up a new channel that will display the following information:

The **Title and Department** column displays your position title, position number, office name, and the organization number for that area.

Select the radio button in the **My Choice** column for the position for which you want to report leave. The majority of monthly-paid employees will have only one option in this column, which is selected by default. If you change positions or timekeeping locations during the month, you will have multiple options. The system will allow you to enter hours on all records for the same period of time. **Please use caution** at times when this option is available because the system has no checks to keep this from happening. Your leave balance will be deducted for the duplicate entry. You should enter leave on the appropriate position for the appropriate time. (Ex. – You change positions on February 15, 2008. The system will allow you to enter hours for your previous position for the entire month of February. You should report leave taken from February 15 – February 29 on your new position and leave prior to February 15 on the old position).
The **Leave Report Period and Status** column contains a drop-down box of available leave reports related to the position in that row. Click on the drop-down box arrow to display the available leave reports. Leave reports are displayed in chronological order by leave period and show the current status of the leave report (i.e. Not Started, In Progress, etc.). Should you need to see leave usage dated past those available for viewing, you may see your previous leave taken in the Leave Balances section of Employee Self Service.

Be sure to select the appropriate month when entering your leave usage. Click on the **Leave Report** button to open the leave report after selecting.

### Leave Report Selection

![Image of Leave Report Selection](image)

#### Your Leave Report

Once you open your leave report, even if you do not make entries, its status changes from **Not Started** to **In Progress**. Once you start your leave report, only you can complete and submit it for approval.

You may access your leave report as many times as you like during the leave period; all time does not have to be entered at once. However, once you have submitted your leave report for approval, you cannot make any changes.

### Time and Leave Reporting

![Image of Time and Leave Reporting](image)

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Leave Report Navigation

Upon opening your leave report, notice the certification statement near the top of the page. This statement legally acknowledges your login to the leave report and submission of the leave report to be true and accurate, just the same as if you were signing a paper leave report with your own signature.

Repeated below the certification statement is your position, department, and leave period information. This is the same information that was displayed on the Leave Report Selection screen where you selected the leave report.

Please pay special attention to the Submit by Date. This is the date your leave report should be submitted and approved by your approver. This date will usually be the 5th of the following month (for example January 2008 leave reports will have a submit by date of February 5th). Employees are strongly encouraged to enter their leave throughout the month. Employees should have their leave report completed and submitted for approval by the 2nd or 3rd of the month. The approver would have until the 5th of the month to review, return for correction, and approve their employee’s leave report.

Time and Leave Reporting

The leave report is organized in a grid format. Days of the week are displayed across the top of the grid; possible types of leave earnings are listed along the left of the grid; and hyperlinks titled **Enter Hours** are displayed for each date and leave earnings type.

Leave must be entered for each appropriate day of the leave period and can be copied to multiple days. The copy feature will be discussed on page 16 of this document.

The leave report displays one week at a time. To advance to the next week of the leave period, click on the **Next** button. Click the **Previous** button to return to the previous week of the leave period (the Previous button will not appear the first week of the month since there are no previous dates to view).
To view your leave report better, you can decrease or increase the text size in your Web browser display. For most Web browsers this option is listed in the View options of the menu bar.

**Position Selection**

If you have multiple positions and leave reports to submit for the leave period, click on the **Position Selection** button to return to the **Leave Report Selection** screen to select another leave report.

**Entering Comments**

You may add comments to your leave report by clicking on the **Comments** button. Enter your message and click on the **Save** button to save the entry and return to the leave report. Comments can be edited or deleted before a leave report has been submitted for approval.

Once your leave report has been submitted for approval, your comments become a permanent record. Comments are not confidential; approvers can view these comments when reviewing the leave report.

**Previewing (Printing) the Leave Report**

You may preview your leave report by clicking on the **Preview** button. The preview feature displays the leave period horizontally across the Web page. Use the horizontal scroll bar to view days not displayed in the initial view.

The Leave Reporting System is designed as a “paperless” system. If you must print a copy of your electronic leave report, the Preview screen is the recommended screen for printing. Ensure your print setting is set for landscape printing. Because Banner is a paperless system, and not designed for printer friendly purposes, it is unlikely that your leave report will print on one page.
Submit for Approval

This button should only be used after all leave has been entered, previewed and is ready for approval. Once the leave report has been submitted for approval, the originator can no longer make changes.

Restarting the Leave Report

If you make errors while entering your leave, you can clear the entire leave report while it is in **In Progress, Returned for Correction** and **Error** status by clicking on the Restart button. Restarting a leave report will clear all entries and return the report status to **In Progress**.

To restart, click on the Restart button and a confirmation screen will appear. Confirm the restart by clicking on the Submit button. The leave report will reappear with no time entered in any fields. You may then begin entering time.
**Entering Leave**

To enter leave into the leave report, click on the **Enter Hours** hyperlink for the appropriate day and leave earning code. The screen will refresh, upon which you may enter the number of hours of leave taken in the **Hours** field. Use decimals as needed to record parts of hours (7.3 = 7 hours 15 minutes, 7.5 = 7 ½ hours, etc.). Information for reporting partial hours can be found on page 15 of this document.

After entering leave in the Hours field, you have the option to either save your entry or save and copy your entry to other days. Click on the **Save** button each time you enter hours in the Hours field before you move on to another entry.

You may access your leave report as many times as you like during the leave period; all leave does not have to be entered at once.

**Time and Leave Reporting**

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

*I certify that the time and/or leave entered represents a true and accurate record of my time and/or leave. I am responsible for any changes made to this record using my ID.*

![Leave Report Form]

**Submitted for Approval By:**

You on January 2, 2008

**Approved By:**

**Waiting for Approval From:**
**Reporting Partial Hours**

Hours are to be reported using only whole hours and tenths of an hour; for example, 3, 7.5, 4.3, 6.1.

Use the following guide to convert minutes to tenths of an hour:

<table>
<thead>
<tr>
<th>Minutes</th>
<th>Tenths of an Hour</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 – 6</td>
<td>.1 hour</td>
</tr>
<tr>
<td>7 – 12</td>
<td>.2 hour</td>
</tr>
<tr>
<td>13 – 18</td>
<td>.3 hour</td>
</tr>
<tr>
<td>19 – 24</td>
<td>.4 hour</td>
</tr>
<tr>
<td>25 – 30</td>
<td>.5 hour</td>
</tr>
<tr>
<td>31 – 36</td>
<td>.6 hour</td>
</tr>
<tr>
<td>37 – 42</td>
<td>.7 hour</td>
</tr>
<tr>
<td>43 – 48</td>
<td>.8 hour</td>
</tr>
<tr>
<td>49 – 54</td>
<td>.9 hour</td>
</tr>
<tr>
<td>55 – 60</td>
<td>1.0 hour</td>
</tr>
</tbody>
</table>
Copying Time

The copy feature of Leave Reporting is useful when you wish to enter the same number of hours for multiple days.

Once you have entered hours in the **Hours** field, click on the **Copy** button

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**Time and Leave Reporting**

The Copy screen displays a checkbox for each day of the pay period. There are two options for copying hours:

**Option 1**
Click on the **checkbox** for each day to which you wish to copy hours.

**Option 2**
Click on the single checkbox **Copy from date displayed to end of the pay period** to copy hours from the date that was selected to the end of the leave period. Use caution when selecting this option to ensure that the system has not included days which you did work.

When you are finished, click on the **Leave Report** button to return to your leave report. It is not necessary to click on the **Copy** button when copying hours, once you enter a check in a checkbox the system understands you want to copy hours to that day.
### Leave Code:

#### Date and leave time to copy:
Copy from date displayed to end of the leave period:
Include Saturdays:
Include Sundays:

#### Copy by date:

<table>
<thead>
<tr>
<th>Saturday</th>
<th>Sunday</th>
<th>Monday</th>
<th>Tuesday</th>
<th>Wednesday</th>
<th>Thursday</th>
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</tbody>
</table>

#### Sick Leave, Shift 1
Dec 07, 2007, 7.5 Hours

**Option 1:** Select individual boxes for select days of the pay period.

**Option 2:** Click this box to copy time from the selected date to the end of the pay period.
Submitting Your Leave Report

Before submitting your leave report for approval, click the Preview button to review your entries. If you have no corrections after previewing and are ready to submit, click on the Submit for Approval button. REMEMBER: Once you have submitted your leave report for approval you cannot make changes.

After submitting your leave report, its status changes from In Progress to Pending. It will remain in pending status until your designated approver takes some kind of action. At this point you are permitted to view the leave report, but you cannot make changes unless the approver returns the leave report for correction.

Once you submit your leave report, a message appears indicating that it was successfully submitted, a message would also appear in this area if any errors or warnings were found by the system.

CAUTION: Be careful when entering leave, as very few error checks take place upon submission. For example, if you, by mistake, enter 75 hours instead of 7.5 hours in a single day, the system will NOT reject the entry.
Important Notes

- Monthly leave usage is not tied to the monthly payroll. Therefore, the moment HRS approves the employee’s submitted leave it will be deducted from the employee’s leave balances. Monthly leave accruals (leave earned by employees) are still tied to the month-end payroll. Leave usage will no longer print on an employee’s pay stub; however, leave balances will continue to be printed. Employees should be aware that the leave balances shown on the pay stub include the current month accrual but do not reflect the leave usage for the month. Employees may also view their leave balances through PipelineMT. To view leave balances through PipelineMT the employee should click on the RaiderNet tab, then click on the Employee tab, and then click on Leave Balances. An employee may also view their leave balances by clicking on the View Leave Balances link located on the Leave Report.

- If your leave report is appearing under an incorrect timekeeping organization, contact Human Resources at Ext 2929 so it can be corrected.

Contact Information

- Please call Tammie Dye at Ext. 5727, Susan England at Ext. 5791, or Lisa Jones at Ext. 2168 in the Payroll/Human Resource Services office with any questions you may have. You may also contact Tammie Dye, Susan England, or Lisa Jones through email at tdye@mtsu.edu, sengland@mtsu.edu, or lijones@mtsu.edu.