LEAVE REPORTING

Faculty and Administrators
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For more information, see Middle Tennessee State University Nondiscrimination Policy

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Overview

Objectives
Welcome to Leave Reporting (LR) Training. The objectives of this training course are to:

- Introduce MTSU Leave Reporting
- Identify basic navigation of a leave report
- Describe how to enter and submit monthly leave usage

Intended Audience
- Administrators
- Faculty

Leave Reporting Introduction
The implementation of Leave Reporting (LR) enables faculty and administrators to report their leave taken via the PipelineMT portal website. 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 used in the LR module.

User Roles
Users may have 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 Services in order to complete the leave process for the employee.

The originator can make changes to the leave report while the report is in In Progress, Returned for Correction or Error status. Once submitted for approval, the originator cannot make any changes in the leave report.

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 approve leave reports submitted by the originator. To process a
leave report through the system an approver’s action is required. 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 Resource Services establishes pre-defined proxies within the department/unit based on the organizational structure. All approvers have their immediate supervisor as a proxy.

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. Proxies are assigned via a request form submitted to Human Resource Services.

http://www.mtsu.edu/hrs/forms/Proxy_Authorization_Form08_2011.pdf.

Transaction Status
A transaction status is assigned to a leave report as it progresses through the leave Reporting process.

Not Started
The originator has not opened the leave report for the pay period.

In Progress
The originator has opened the leave report for the pay period.

Pending
The originator has submitted the leave report for approval.

Error/Warnings
The leave report will show a warning message for hours entered under earnings codes that do not accrue leave (i.e., military leave, jury duty leave, bereavement, etc.). Reports can also appear in error or warning status if the employee does not have enough accrued annual or sick leave to cover the hours entered, or if a leave report is submitted for approval with zero hours entered. Approvers must carefully review any reports in error or warning status to ensure that leave entered is correct.

Returned For Correction
The approver has returned the leave report to the originator for correction. The originator must make the necessary corrections and resubmit to the approver before the Submit by Date that appears on the leave report.

Approved
The approver carefully reviews the leave entered by the originator and approves his/her entry. Once the department/unit head approves leave it moves to Human Resource Services control for final processing.
Completed
Human Resource Services has successfully approved a leave report and any reported leave usage has deducted from appropriate leave balances of the employee.

Accessing Your Leave Report
Deadlines are in place for submitting your leave report each month. These dates are listed at (http://www.mtsu.edu/hrs/leavereporting/Deadline_Dates_for_Reporting_Leave.pdf)

Logging in to your PipelineMT account.
Log in to your PipelineMT account using your MTSU email username and password. When logging in keep in mind that your login is case sensitive. If you have trouble logging in contact the ITD Help Desk at 615-898-5345 or ITD.Help@mtsu.edu.
Locating Your Leave Report
To start a leave report the employee must enter the Leave Reporting section by clicking on the “Employees” link on the left side of the page.

Click on the Leave Report picture

Faculty and administrators use the Leave Report icon to report leave. MTSU hourly employees use Time Entry. If Time Entry is chosen click the “Employees” link to the left to return to this page.
Time Reporting Selection

Individuals who have the role of approver or proxy will begin at the Time Reporting Selection page. This page requires you to tell the system what you want to do, such as accessing your leave report or accessing leave reports for approval. *(Note: Accessing my Leave Request is not available at this time.)* Individuals without these roles begin with the Leave Report Selection page.

Begin by clicking the **Access my Leave Report** radio button under **My Choice** and then the **Select** button.
Leave Report Section

The Leave Report Selection page contains a dropdown box of available leave reports related to the position in that row. Click the dropdown box to display the available leave reports. Leave reports are displayed in chronological order by leave period and shows the status of the report (i.e., Not Started, In Progress, Pending, etc.).

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

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 signed a paper document.

Below the certification statement is your position number, department, and leave period information.

Please pay special attention to the Submit by Date. Your leave report must be submitted and approved by this date. This date is usually around the fifth to eighth day of the following month. Employees are strongly encouraged to enter their leave throughout the month. Employees should have their leave reports completed and submitted for approval by the second or third of the following month. The approvers then have time to review, return for correction, and approve the leave report.

ALWAYS REPORT THE TYPE OF LEAVE YOU TAKE EVEN IF YOUR LEAVE BALANCE IS INSUFFICIENT. Enter sick leave as “Sick Leave” regardless of your Sick Leave balance. The Banner system will automatically adjust using your Annual Leave, if needed. NOTE: This pertains to Administrative employees and 12 Month Faculty only. 9/10 Month Faculty do not accrue Annual Leave.
The leave report is in a grid format with days of the week displaying across the top of the grid. A list of available types of leave are along the left side of the grid; and links entitled “Enter Hours” display in each date block within the grid.

Leave is entered for each appropriate day of the leave period and can be copied to multiple days. We discuss the copy feature in the “Entering Multiple Days at a Time” section later in 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).

Position Selection
If you have changed positions within the leave period, contact the Payroll Services department for help if you see more than one leave report available.

Comment
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. Click on the “Previous Menu” button to return to your leave report. Comments can be edited or deleted before your leave report is submitted for approval. However, once submitted comments are permanent. Comments are not confidential, do not go away, and are a part of the employee’s permanent record.
Previewing 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 being displayed in the initial view.

The Leave Reporting System is designed as a “paperless” system and not designed for printer friendly purposes. If you must print a copy of your report, use the landscape setting. NOTE: Your report will not print on one page.

Submit for Approval
Click the Submit button only after all leave is entered for month, previewed by you, and is ready for approval. Once you have submitted your leave report for approval, you may no longer make any 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 only one day of leave at a time:

**NOTE:** 9/10 Month Faculty do not have a choice of Annual Leave

Scroll to the day you need to report leave and click on “Enter Hours” of the appropriate leave type. This link will open a dialog box that you will enter the number of hours. Click on the blue “Enter Hours” link and enter number of hours used in the “Hours” box. Use decimals as needed to report parts of hours (7.3 = 7 hours and 15 minutes, 7.5 = 7 hours and 30 minutes, etc.) See the “Reporting Partial Hours Grid” section later in this document.

Click on the **SAVE** button and your leave will be entered.
Entering multiple days at a time

**NOTE: 9/10 Month Faculty do not have a choice of Annual Leave**

Scroll to the day you need to report leave and click on “Enter Hours”. This link will open a dialog box that you will enter the number of hours. Click on the blue “Enter Hours” link and enter number of hours used in the “Hours” box.
Click on the COPY button.

The following screen will appear.

Check the box under each date that you intend to enter leave OR if you are entering leave for the entire month click the box on the “Copy from date displayed to end of the leave period:” line. Do not click on the “Include Saturdays” or “Include Sundays:” unless these are normal workdays for you.
NOTE: Please make sure that you do not enter leave for holidays or weekends. 9/10 Month Faculty will not report leave on Fall/Spring breaks.

Scroll to the bottom of the page and click on the COPY button once you have marked your Leave Report.

Click on the Leave Report button and you will be directed back to the Leave form. At this point, you will be able to submit your report or log out. Once you have submitted your leave report for approval, you will not be able to make any changes.
Submitting your Leave Report for Approval

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 type 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 under the certificate statement indicating that it has been successfully submitted, a message will also appear if any errors or warnings are found by the system.

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

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**Reporting Partial Hours Grid**

Report hours using whole hours and tenths of an hour only. (e.g., 3, 7.5, 4.3, etc.)

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

- Once Human Resource Services approves the submitted leave report, the leave usage is deducted from the employee’s balances.
- Current month leave accruals (leave earned by employees) are added to the employee’s balance during payroll processing.
- Leave balances print on the employee’s pay stub, but leave usage each month does not.
- Leave balances shown on the pay stub include the current month accrual but do not reflect the leave usage for the month.
- Employees may view their leave balance through the PipelineMT > Employees > Leave Balance. Note: PipelineMT will always show you the leave balance “As of Current Date”. Your leave usage and/or leave accrual may not be reflected. If you have questions contact the Payroll Services department.

- FOR ADMINISTRATIVE EMPLOYEES AND 12 MONTH FACULTY ONLY: Always use sick leave, not annual leave, when you are sick regardless of your Sick Leave balance. The Banner system will adjust your leave balances using your annual leave when you have exhausted all of your sick leave.
- Submission and approval deadlines can be found on the Human Resource Services website at http://www.mtsu.edu/hrs/leaveeporting/Deadline_Dates_for_Reporting_Leave.pdf
## Contact Information

If you have questions or need help with your leave report please contact:

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone Number</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lisa Mitchell</td>
<td>Payroll Coordinator</td>
<td>615-898-5852</td>
<td><a href="mailto:Lisa.Mitchell@mtsu.edu">Lisa.Mitchell@mtsu.edu</a></td>
</tr>
<tr>
<td>Lisa Jones</td>
<td>Assistant Director</td>
<td>615-898-2168</td>
<td><a href="mailto:Lisa.Jones@mtsu.edu">Lisa.Jones@mtsu.edu</a></td>
</tr>
</tbody>
</table>