

LEAVE REPORTING



Approver and Proxy Training

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Overview

Objectives

Welcome to Leave Reporting Training. The objectives of this training course are to:

- Introduce MTSU Leave Reporting
- Identify Leave Reporting roles and statuses
- Introduce approval screens
- Approve leave step-by-step
- Discuss Proxies

Intended Audience

- Department/Unit Heads
- Proxies

Leave Reporting Introduction

The implementation of Leave Reporting (LR) enables faculty and administrators to report their leave usage via the PipelineMT portal website. LR is a module of the Banner Human Resource administrative system used by the university.

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 work with Human Resource 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 deducted from appropriate leave balances of the employee.

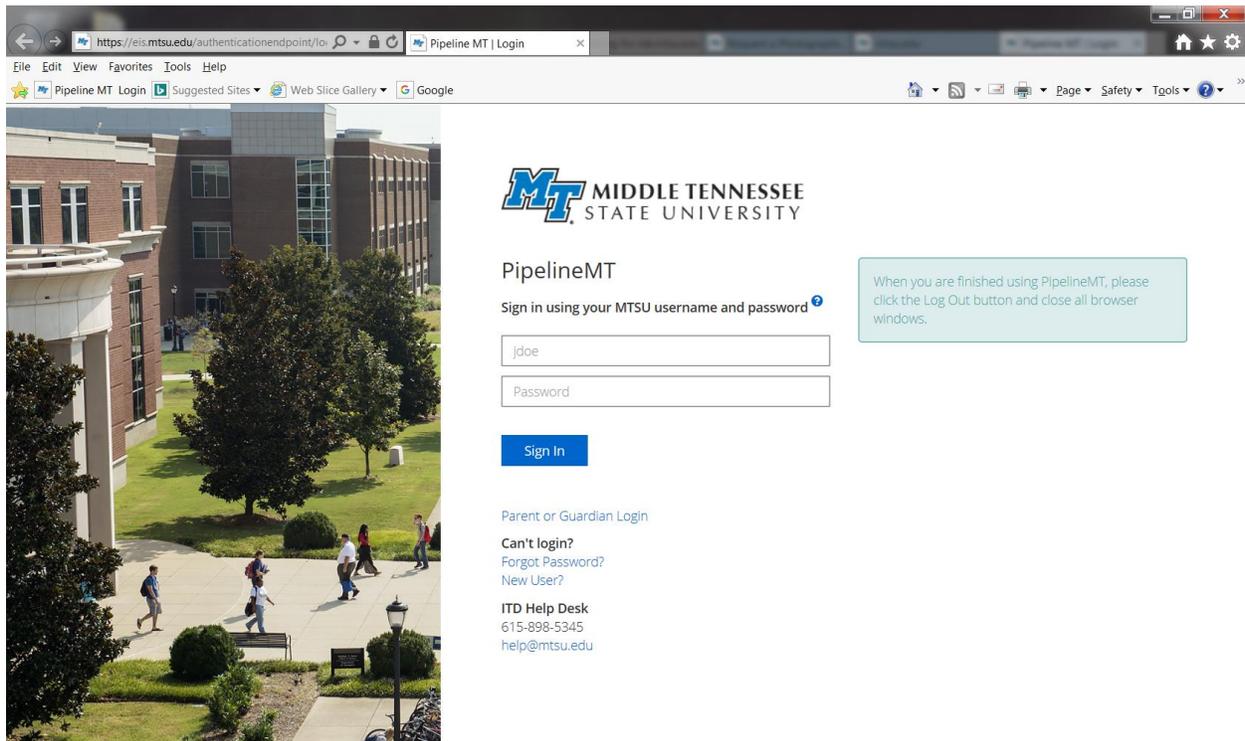
Approval Pages Guidelines

As an approver or proxy, you are responsible for reviewing, approving, and if necessary, modifying your employees' submitted leave before the pay period deadline.

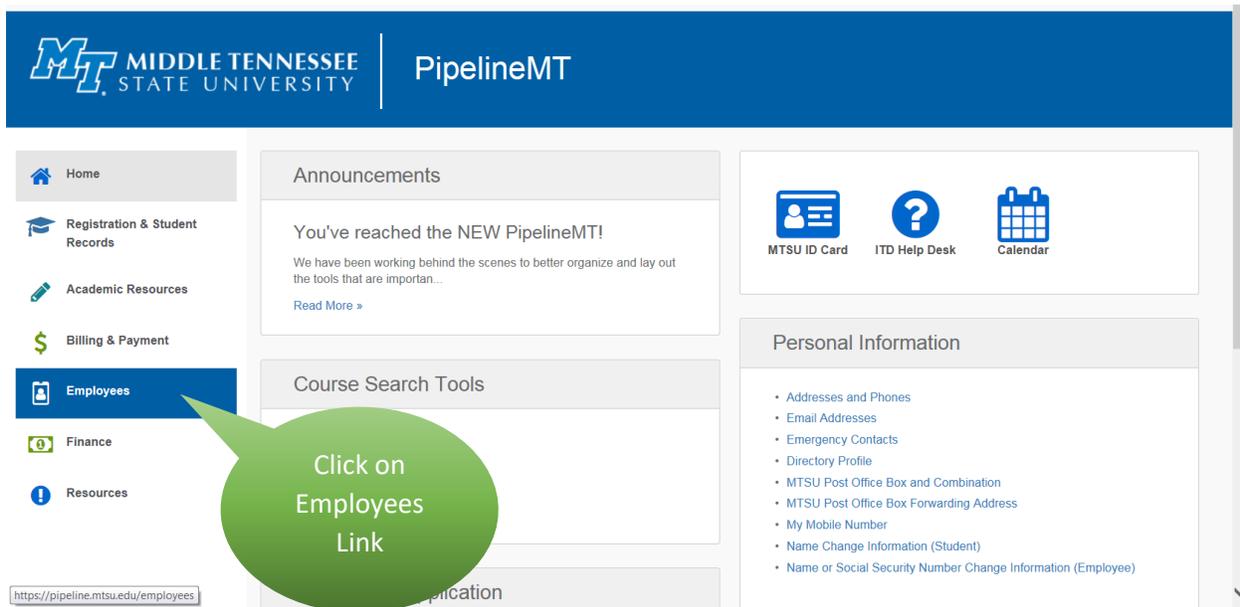
(http://www.mtsu.edu/hrs/leavereporting/Deadline_Dates_for_Reporting_Leave.pdf)

Logging into your PipelineMT account

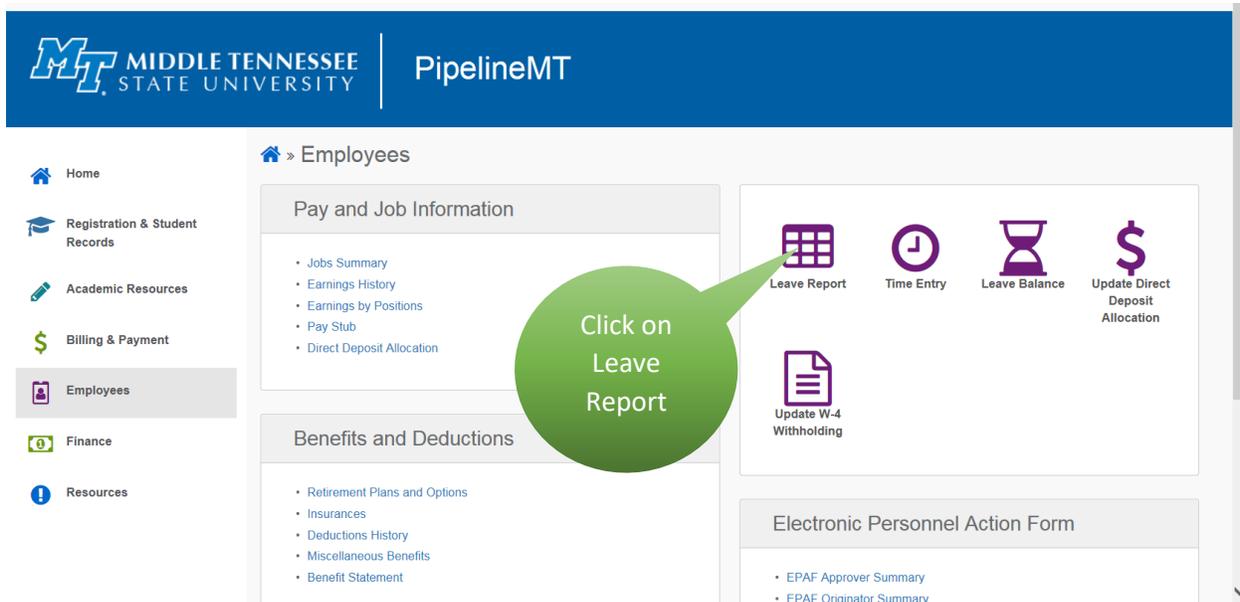
Log in to your PipelineMT account using your MTSU email username and password. When logging in keep in mind that your login is case sensitive. If you have trouble logging in contact the ITD Help Desk at 615-898-5345 or ITD.Help@mtsu.edu.



Click the **Employees** link on the left side of the page to enter the Employees section in PipelineMT.



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 roll 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 **Approve or Acknowledge Time** radio button under **My Choice** and then the **Select** button.

The screenshot shows the PipelineMT interface. The header includes the Middle Tennessee State University logo and the text 'PipelineMT'. A left-hand navigation menu lists various services: Home, Registration & Student Records, Academic Resources, Billing & Payment, Employees, Finance, and Resources. The main content area is titled 'Time Reporting Selection' and contains the following elements:

- A link for 'PROXY SET UP - use this link to request a proxy'.
- A warning message: 'DO NOT CLICK ON Proxy Set Up at the bottom of this screen. It has been disabled.'
- A section titled 'Selection Criteria' with a blue header 'My Choice'.
- Form fields with radio buttons and checkboxes:
 - 'Access my Time Sheet:' with a radio button.
 - 'Access my Leave Report:' with a radio button.
 - 'Access my Leave Request:' with a radio button.
 - 'Approve or Acknowledge Time:' with a selected radio button.
 - 'Approve All Departments:' with a checkbox.
 - 'Act as Proxy:' with a dropdown menu set to 'Self'.
 - 'Act as Superuser:' with a checkbox.
- A 'Select' button at the bottom.

Two green callout bubbles are overlaid on the screenshot. One bubble points to the 'Approve or Acknowledge Time' radio button and contains the text 'Click Approve or Acknowledge Time'. The other bubble points to the 'Select' button and contains the text 'Then SELECT'.

Leave reports are listed under the timekeeping organization code (T Org) that was submitted on your employees' hiring paperwork (PAF). Once the first staff member has begun a leave report then all employees' leave reports within your T Org will appear under their appropriate status. Records do not appear in the Leave Approval area until at least one of your employees within the timekeeping organization has started his/her report for the pay period.

NOTE: If you have a record appearing under an incorrect T Org please contact Human Resource Services at 615-898-2929 for correction.

Acting as a Proxy

Based on the hierarchical structure of the unit/department, individuals inside the organization may be designated as proxies within the unit/department. This allows supervisors within the organization to approve the leave of the employees they supervise. Department/Unit heads (approvers) may also appoint an individual within their area as their proxy for leave reporting. Users with a proxy role in Leave Reporting have the ability to act and assume all privileges as the assigned approver of leave.

To act as a proxy click on the Leave Report icon from the Employee page in PipelineMT. At the Time Reporting Selection page, select the individual for whom you wish to act as a proxy from the “Act as Proxy” dropdown box. If no selection is made in the box you will be acting as “Self”, which is the default selection for this field, and will not have proxy capabilities.

Click the SELECT button.

The screenshot shows the PipelineMT interface. The top navigation bar includes the Middle Tennessee State University logo and the PipelineMT title. A left sidebar contains navigation icons for Home, Registration & Student Records, Academic Resources, Billing & Payment, Employees, Finance, and Resources. The main content area is titled "Time Reporting Selection" and contains the following elements:

- A "PROXY SET UP" link with a tooltip: "DO NOT CLICK ON Proxy Set Up at the bottom of this screen. It has..."
- Selection Criteria** section with a "My Choice" header and several radio button options:
 - Access my Time Sheet:
 - Access my Leave Report:
 - Access my Leave Request:
 - Approve or Acknowledge Time: (highlighted by a callout bubble: "Choose Approve or Acknowledge Time")
 - Approve All Departments:
- Act as Proxy:** A dropdown menu currently showing "Self". A callout bubble points to it with the text: "Choose name of individual you are acting as proxy for".
- Act as Superuser:**
- A "Select" button, which is highlighted with a red box.

At the bottom of the page, the text "RELEASE: 8.12.1.5 PROD04" is visible.

Approver Selection

If you approve more than one timekeeping organization, select the department that you wish to approve by clicking the radio button under **My Choice** and then on the **Select** button to view the employees under this organization. *Note: reports for the pay period needing approval is the default in the Leave Period dropdown box.*

The Sort Order default is “Sort employees’ records by Status then by Name”. This groups employees together by their report status. Changing to the “Sort employees’ records by Name” will group by alphabetical order regardless of status. “Sort employees’ records by Status then by Name” is the recommended sort order to use.

The screenshot shows the PipelineMT web application interface. On the left is a navigation menu with icons for Home, Registration & Student Records, Academic Resources, Billing & Payment, Employees, and Finance. The main content area is titled "Approver Selection" and includes a "PROXY SET UP" link. Below that is a "Leave Report" section with a table:

Department and Description	My Choice	Leave Period
M, T11000, Presidents Office	<input checked="" type="radio"/>	AT, Jan 01, 2018 to Jan 31, 2018
M, T11100, Institutional Equity and Compliance	<input type="radio"/>	AT, Jan 01, 2018 to Jan 31, 2018
M, T11200, Audit and Consulting Services	<input type="radio"/>	AT, Jan 01, 2018 to Jan 31, 2018
M, T11300, Legal Assistant	<input type="radio"/>	AT, Jan 01, 2018 to Jan 31, 2018

Below the table is a "Sort Order" section with a "My Choice" header. It contains two radio button options: "Sort employees' records by Status then by Name:" (selected) and "Sort employees' records by Name:". A "Select" button is located below these options. A green callout bubble points to the "My Choice" header in the table with the text "Choose the department you wish to approve". Another green callout bubble points to the "Select" button with the text "Then click SELECT". At the bottom left of the interface, it says "RELEASE: 8.12.1.5 PROD01".

Department Summary Page

On this page, a table appears listing all employee records in the timekeeping organization and a summary of each record. This page shows the transaction status of the employees in your organization and a summary row for each employee. Information available in these summary rows depend on the transaction status of the employee.

Department Summary

Select the employee's name to access additional details.

COA: Middle Tennessee State University
 Department: Human Resource Services Payroll
 Leave Period: to Jan 31, 2018
 Act as Proxy: Applicable
 Leave Period Leave Entry Status: Open until Feb 06, 2018, 04:35 PM

Change Selection Select All, Approve or FYI Reset 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
M#	Name	Approve	.00	7.50	.00		<input type="checkbox"/>	<input type="checkbox"/>		Change Leave Record

In Progress Records

In Progress						
ID	Name, Position and Title	Total Days	Total Hours	Total Units	Cancel	Other Information
		.00	.00	.00		Leave Balance

Not Started Records

Not Started		
ID	Name, Position and Title	Other Information

Transaction Status

A Transaction Status heading appears directly above the ID and displays the status of a leave report. Approvers can only approve leave reports in *Pending* status. Leave reports that have not been submitted for approval will appear as *Not Started*, *In Progress*, *Returned for Correction*, or *Error*.

Summary Row for **Pending** Transaction Status Employees

ID Column

The ID column displays the employee's MTSU ID number.

Name, Position, and Title

The Name, Position, and Title column lists each employee's information. There is one row for each employee assigned to the timekeeping organization.

Required Action

The Required Action column identifies what action is required by you as the approver.

Total Days

Not used, MTSU reports leave in hours.

Total Hours

Total Hours are the total number of hours entered on the leave report for this period by the employee. This is a total of all leave types taken during the period.

Queue Status

The Queue Status column displays the routing status of the record once submitted by the employee.

Approve or FYI

The Approve or FYI column contains a checkbox for the required action. This is one of three methods of approving leave reports.

Return for Correction

The Return for Correction column contains a checkbox that allows the approver to return a leave report to an employee for correction. This is one of two methods for returning a record of correction. We discuss the second action below in the Change Leave Record information.

Other Information

The Other Information column contains hyperlinks that take you into the employee's leave report record. Some of the common links are:

[Change Leave Record](#)

As an approver, you have the ability to make changes to an employee's leave report after the record is in *Pending* status. By clicking on the Change Leave Report link, you open the employee's actual leave report upon which you may make changes and approve the record. This is the second, and least convenient, method of approving a leave report. You are not encouraged to change a leave report. Make every attempt to contact the employee to make changes to their own record. If you make changes, leave a comment in the Comments field indicating what you changed, for what reason, and place your initials after the comment.

[Leave Balance](#)

Link to employee's leave balances

[Leave Balance Warning](#)

Indicates possible insufficient leave balances. The approver should review the employee's leave balances and the leave submitted on the leave report to determine that status of the

employee's leave. If a "Leave Without Pay" (LWOP) situation exists, please contact the Human Resource Office at 615-898-2929.

Leave Updated

Indicates that reported leave has been processed and deducted from the employee's leave balances.

Comments

Indicates there are comments entered on the record. The employee, approver, or Human Resource Services office may leave comments. Comments are not confidential, do not go away, and are a part of the employee's permanent record.

Employee Details Page

As the approver, you are responsible for ensuring that leave entered by your employees is accurate. Before approving leave reports, click employee's name on the Department Summary page to open the Employee Details page. This page has information sections and action buttons.

MIDDLE TENNESSEE STATE UNIVERSITY | PipelineMT

Home
Registration & Student Records
Academic Resources
Billing & Payment
Employees
Finance
Resources

Employee Details

Select Next or Previous to access another employee.

Employee ID and Name: [Redacted] **Department and Description:** M T16880 Comm Studies & Organizational Comm
Title: [Redacted] **Transaction Status:** Pending

Previous Menu | Approve | Return for Correction | Change Record | Delete | Add Comment | Next

Leave Balances | Routing Queue

Leave Report

Earnings	Total Hours	Total Units	Thursday , Feb 01, 2018	Friday , Feb 02, 2018	Saturday , Feb 03, 2018	Sunday , Feb 04, 2018	Monday , Feb 05, 2018	Tuesday , Feb 06, 2018	Wednesday , Feb 07, 2018	Thursday , Feb 08, 2018	Friday , Feb 09, 2018	Sa
Sick Leave	8.5									8.5		
Total Hours:	8.5									8.5		
Total Units:		0										

Leave Balances as of Feb 08, 2018

Type of Leave	Hours or Days	Banked	Date Available	Available Beginning Balance	Earned	Taken	Available Balance
Bereavement	Hours	0	Aug 01, 2017		0	0	0
Inclement Weather	Hours	0	Aug 01, 2017		0	0	0
Jury Duty	Hours	0	Aug 01, 2017		0	0	0
Military Leave	Hours	0	Aug 01, 2017		0	0	0
Leave Without Pay	Hours	0	Aug 01, 2017		0	0	0
Sick Leave	Hours	0	Aug 01, 2017		285	45	14.5
							315.5

Routing Queue

Name	Action and Date
[Redacted]	Originated Feb 08, 2018 06:35 am
[Redacted]	Submitted Feb 08, 2018 06:36 am
[Redacted]	Pending
Lisa A Mitchell	In the Queue

Previous Menu | Approve | Return for Correction | Change Record | Delete | Add Comment | Next

Leave Report | Routing Queue

RELEASE: 8.12.1.5 PROD04

Leave Report

The Leave Report section displays a day-by-day breakdown of the leave entered for each day of the pay period and extends horizontally across the page. Use the scroll bar at bottom of page to view the entire month's entries.

Leave Report											
Earnings	Total Hours	Total Units	Friday , Dec 01, 2017	Saturday , Dec 02, 2017	Sunday , Dec 03, 2017	Monday , Dec 04, 2017	Tuesday , Dec 05, 2017	Wednesday , Dec 06, 2017	Thursday , Dec 07, 2017	Friday , Dec 08, 2017	Saturday , Dec 09, 2017
Sick Leave	90		7.5			7.5	7.5	7.5	7.5	7.5	
Total Hours:	90		7.5			7.5	7.5	7.5	7.5	7.5	
Total Units:		0									

Leave Balances

The Leave Balances section lists available balances for the employee. Leave used during current pay period are not reflected in these totals until approval and processing by the Human Resource Services office is complete.

Leave Balances as of Feb 08, 2018							
Type of Leave	Hours or Days	Banked	Date Available	Available Beginning Balance	Earned	Taken	Available Balance
Bereavement	Hours	0	Sep 01, 1996	0	0	0	0
Inclement Weather	Hours	0	Sep 01, 1996	0	0	0	0
Jury Duty	Hours	0	Sep 01, 1996	0	0	0	0
Sick Leave	Hours	0	Dec 19, 2005	1235	45	450	830
Leave Without Pay	Hours	0	Sep 01, 1996	0	0	0	0
Military Leave	Hours	0	Sep 01, 1996	0	0	0	0

Comments

The Comments section appears if the employee, approver, or Human Resource Services enters comments into the record. Ignore the Confidential indicator. Comments are viewable to anyone in the routing queue. Comments are not confidential, do not go away, and are a part of the employee's permanent record.

Comments			
Date	Made by	Confidential	Comments
Dec 12, 2017 11:05 am	Lisa A Mitchell	No	Moved to pending for completion and approval. lm

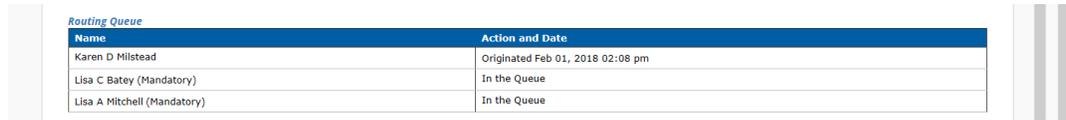
Routing Queue

This section displays the name, action, and date of each person assigned to the routing queue for the timekeeping organization.

The first example below is a leave report that has been approved by all parties including Human Resource Services. You see the record shows being Originated, Submitted, Approved, and Overridden with the date and time stamp of when each action occurred. (Overridden is language used by Banner for the final approval.)

Routing Queue	
Name	Action and Date
Lisa A Mitchell	Originated Dec 12, 2017 11:05 am
Lisa A Mitchell	Submitted Dec 12, 2017 11:05 am
Maria Bachman	Approved Jan 08, 2018 10:02 am
Lisa A Mitchell	Overridden Jan 10, 2018 03:16 pm

Once the employee opens the leave report, the “Originated” action and date will show. All other actions will have “In the Queue” with no date. As each step is taken, the notification will change from “In the Queue” to the appropriate action along with the date and time.



Routing Queue	
Name	Action and Date
Karen D Milstead	Originated Feb 01, 2018 02:08 pm
Lisa C Batey (Mandatory)	In the Queue
Lisa A Mitchell (Mandatory)	In the Queue

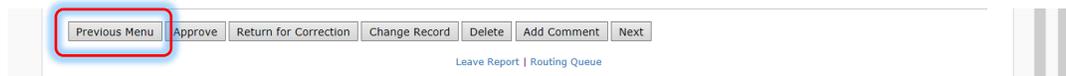
NOTE: if an employee notifies you that he/she cannot enter leave into their report, this is the place to find where the report is in the routing queue.

How to Take Action on the Leave Report

At this point, you will perform one of the following actions by clicking on the buttons located at the top or bottom of the Employee Detail Page.

Previous Menu

The “Previous Menu” button returns you to the Department Summary Page without taking any action on the employee’s leave report.



Approve

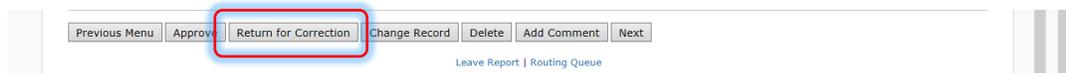
After reviewing the employee’s leave report, click the “Approve” button to approve the leave. Although other ways are discussed in this handbook, this is the recommended method of approving leave reports.



Return for Correction

By clicking on the “Return for Correction” button, you return the leave report to the employee for his or her correction. There are no system-generated notifications sent to an employee when you return a leave report for correction. Please make sure to notify your employee that you have returned their leave report and that they must make corrections and resubmit it when done.

Keep the [payroll calendar deadlines](#) in mind when returning a leave report. If there is not enough time before the deadline for the employee to make a correction and resubmit then you should make the necessary corrections for them. Notify the employee of the corrections and document what was done using the Comment option. Find deadline submission dates at http://www.mtsu.edu/hrs/leavereporting/Deadline_Dates_for_Reporting_Leave.pdf



Change Record

The Change Record option allows you to change the leave report for the employee. It is not recommended that you change an employee's leave report, but there are times when this will be the only option for you. Document the changes made in the Comment section and notify your employee of these changes. When choosing the Change Record option, you are directed to the Leave Report Section page (see *Leave Reporting for Faculty and Administrators Handbook for more detailed instructions on entering leave*). Enter changes and save the report. Once saved, the report will move into a "Pending" status. At this point, you will be able to approve the corrected leave report.



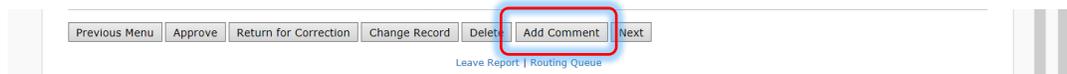
Delete

DO NOT USE THIS OPTION. The Delete option will change the leave report back to a not started status for the current pay period.



Add Comment

You may add comments to the leave report by selecting this option. Enter your message and click the "SAVE" button. Click the "Previous Menu" button to return to the leave report. Always enter your initials after your comment. Comments are not confidential, do not go away, and are a part of the employee's permanent record.



Comment Page

- Academic Resources
- Billing & Payment
- Employees
- Finance
- Resources

Leave Report Period: Feb 01, 2018 to Feb 28, 2018

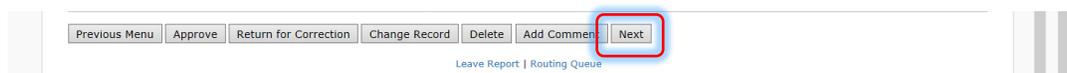
Made By: Lisa A Mitchell
Comment Date: Feb 08, 2018
Confidential Indicator:

Enter or Edit Comment:

Save Previous Menu

Next

Use the "Next" button to move to the next employee in your timekeeping organization.



Step-by-Step Guide to Approving Leave Reports

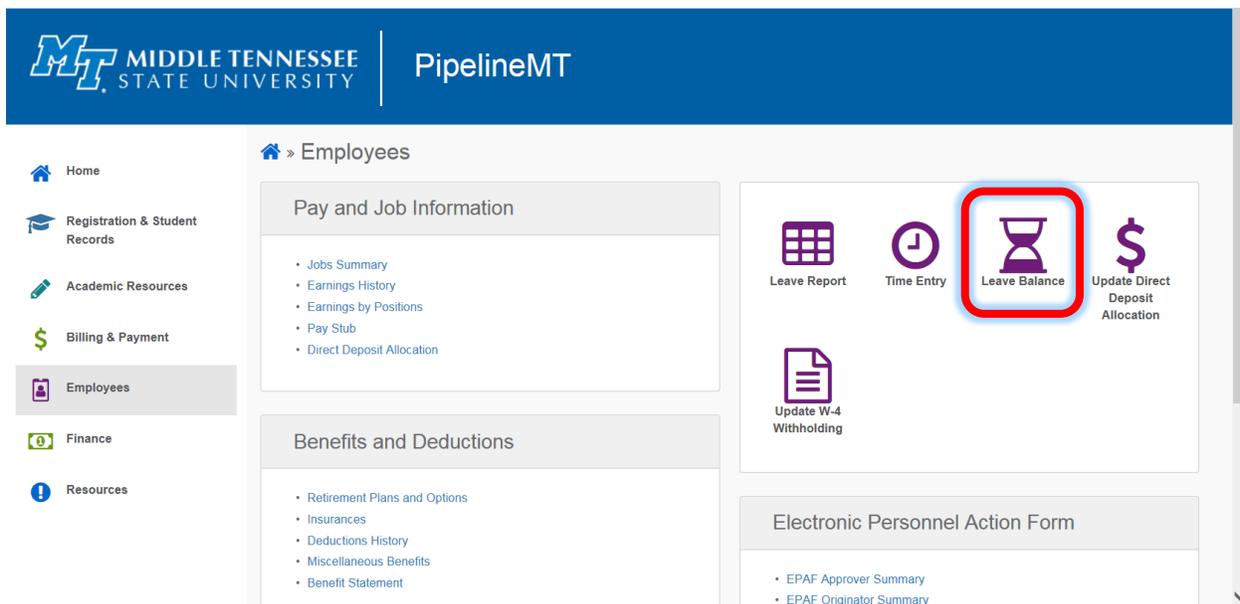
1. Click the Employee link within PipelineMT navigation main page to access the Employee pages
2. Click the Leave Reporting icon on the Employees page
3. From the Time Reporting Selection page select the option to **Approve or Acknowledge** and click the SELECT button
4. If you have permission to approve more than one timekeeping organization click the button under "My Choice" and then click the SELECT button
5. Click on the employee's name under the "Pending" transaction status section to open the Employee Details page
6. If leave has been entered correctly, click on the APPROVE button. If the entry is not correct, return the record for correction or make necessary changes yourself if the deadlines do not permit you enough time to return the report. (For help see "Return for Correction" and "Change Record" instructions in the "How to Take Action on the Leave Report" section.)
7. Click the NEXT button to view the details of the next employee record. Click on the PREVIOUS MENU button to return to the Department Summary page.

Deadline Dates for Reporting Leave:

http://www.mtsu.edu/hrs/leavereporting/Deadline_Dates_for_Reporting_Leave.pdf

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 after payroll has processed.
- 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's accrual but does not reflect the leave usage for the month.
- Since employees do not accrue leave for military leave, or jury duty you will see a warning message, "Possible Insufficient Leave Balance" when approving the report. You may ignore these messages.
- Departments are completely responsible for their leave reporting internal control system. As an approver, you are responsible for ensuring that the time your employee enters on his/her leave report is accurate.
- 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 ONLY:** Always use sick leave, NOT annual leave, when you are sick regardless of your sick leave balance. The Banner system adjusts your leave balances using your annual leave when you have exhausted all of your sick leave.
- If you have a leave report appearing under an incorrect timekeeping organization, contact Human Resource Services at 615-898-2929.
- Submission and approval deadlines can be found on the Human Resource Services website at http://www.mtsu.edu/hrs/leaveeorting/Deadline_Dates_for_Reporting_Leave.pdf

Contact Information

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

Shannon Sexton
Payroll Coordinator
615-898-5852

Shannon.Sexton@mtsu.edu

Lisa Jones
Assistant Director
615-898-2168

Lisa.Jones@mtsu.edu