Instructions for Supervisors of Exempt Employees

Self-Service

https://selfservice.wittenberg.edu/
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IMPORTANT LEAVE INFORMATION

Leave reporting no longer requires the employee and supervisor to “sign off” on the leave every month. Supervisors should be actively approving leave requests and holding employees accountable for tracking leave.

Exempt employees are given vacation and sick leave in days. Unfortunately, the system cannot display leave in “days”. Therefore, all balances are displayed in hours. Per the Employee Manual, exempt employees must use leave time in increments of a half day (4 hours) or a full day (8 hours).

SUPERVISORS – ONLY APPROVE LEAVE REQUESTS THAT ARE IN INCREMENTS OF 4 OR 8 HOURS!

Reminder: leave requests are considered legal documents.
DEFINITIONS

**Advanced:** Leave hours/days, that have not yet been accrued or earned, deposited into the employee’s leave bank upon hire and then every Jan 1 thereafter. Employees can use advanced leave before it is accrued or earned.

**Accrued:** Leave hours/days that have been earned based on policy.

- For example, employees accrue 2.08 days (16.65 hours) of vacation for each full month they work. When an employee works Jan 1 through Dec 31, they will have accrued the amount they were advanced in January. Proration occurs for new hires after Jan 1.
- For example, Ezry was advanced 200 vacation hours on 1/1. He is retiring on 7/31. He will have accrued 116.5 hours by his retirement date. Because he earned 116.5 of his 200 vacation hours he will be paid for any unused hours up to the 116.5 hours with the remaining 83.5 hours considered unearned and no pay due.
  - If Ezry used **40 of the accrued 116.5** hours, he will be paid for 76.5 hours.
  - If Ezry used **120.5** hours, he will owe 4 hours of pay to the university.

**Carry-over:** Leave from a previous year allowed to rollover to the current year

**Submit:** The employee completes a leave request and submits for the supervisor to view and approve

**Un-submit:** The employee retracts the leave request before the supervisor approves

**Approve:** The supervisor views the employee’s leave request and approves

**Reject:** The supervisor rejects the employee’s leave request

**Withdraw:** The employee withdraws the leave request AFTER the supervisor approved the initial leave request

**Withdraw Approval:** The supervisor approves the withdrawal request and the employee can resubmit as needed
IMPORTANT VACATION POLICY DETAILS
(see full policy in Employee Manual)

Exempt staff are advanced 25 days of vacation on January 1.
• If a new employee begins on April 1, they will accrue 18.5 days (148 hours) of vacation through December 31. Vacation time is prorated from the date of hire at the rate of 2.08 days (16.65 hours) per month for a total of 6.25 days (50 hours) per quarter (we should probably also put hours since that’s the way the system is set up). Administrative staff may take vacation after thirty (30) days of continuous full-time employment.
• If an employee is leaving the university, they will only be paid based on the vacation earned up to their last working day. For example, if an employee’s last day is June 30, they will only be paid out for 12.5 days (100 hours) they’ve earned. Additionally, to receive a vacation payout at the time of departure, the employee must have worked at the university for a full year and given at least a two week notice.
Carry-over – “use it or lose it!”

• With the new leave reporting and balances on Self-Service, it is up to the employee to be sure they are using carry-over time by June 30.
• Administrative staff can carry-over up to 10 days (80 hours) that must be used by June 30. Any carry-over time not used by June 30 will be removed from the balance and will appear as an adjustment. AGAIN, this is up to the employee to manage. The process will happen automatically and will not be adjusted for lack of knowing or action.
• Employees can now enter leave requests with a future date. Once those hours are approved by the Supervisor, the hours will be removed from the employee’s leave balance and Self-Service will show the adjusted balance. But use caution because this may not account for the need to use prior year carry-over days before 6/30.
• For example: An employee carried-over 10 days (80 hours) from the previous year for a total of 280 hours as of 1/1. On 3/31 they key into Self-Service that they used 5 days (40 hours) in March and also request 5 future days (40 hours) in July that their supervisor approved. Although the balance in Self-Service will adjust to show 200 hours remaining, they still have 5 days (40 hours) they must use before June 30 or else they will lose the 5 days (40 hours). This is up to the employee to manage.
APPROVING LEAVE REQUESTS
When an employee submits a leave request, the supervisor is notified by email (EMAIL 1). The employee can edit the request before the supervisor approves. The supervisor will be notified that the request was unsubmitted (EMAIL 2).

Sick leave request of 8.00 hours for 04/10/2023 - 04/10/2023 was submitted by Anna Robinson.

Please logon to Self-Service to review and approve this request.

Employee leave balances will not be updated until leave requests are approved by supervisors.

EMAIL 1

Sick leave request of 8.00 hours for 04/10/2023 - 04/10/2023 was unsubmitted by Anna Robinson.

No action required.

EMAIL 2
To view pending leave requests and employee leave balances, log into **Self-Service** and choose **Employee**.
Welcome to Colleague Employee Self-Service!

- Tax Information
  Here you can change your consent for e-delivery of tax information.

- Time Entry
  Here you can fill out your timecards.

- Earnings Statements
  Here you can view your earnings statement history.

- Employee Proxy
  Here you can delegate certain types of work tasks to another employee.

- Supervisor Employee Leave Balances
  Leave Balances

Please note: some of the options displayed are not active.
If the supervisor has multiple employees they oversee, they can use the filters to sort. Be sure to click **Apply Filters**.

Click the blue arrow to expand to see Leave Requests for each employee.

To view the details of the leave request, choose **View**.

**NOTE:** In these scenarios, the employee’s name is Anna Robinson and the supervisor’s name is Marie Thompson.

Use **Collapse All** to view all employees.
Since the employee entered 6 hours, the supervisor must go in to edit the leave request. Click View.

**IMPORTANT**
Exempt employees are given vacation and sick leave in days. Unfortunately, the system cannot display leave in “days”. Therefore, all balances are displayed in hours. Per the Employee Manual, exempt employees must use leave time in increments of a half day (4 hours) or a full day (8 hours).

**SUPERVISORS – ONLY APPROVE LEAVE REQUESTS THAT ARE IN INCREMENTS OF 4 OR 8 HOURS!**

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Total Hours</th>
<th>Date Range</th>
<th>Actioner</th>
<th>Status</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sick</td>
<td>8.00</td>
<td>4/10/2023</td>
<td>Ms. Marie Thompson</td>
<td>Approved</td>
<td><img src="View" alt="Actions" /></td>
</tr>
<tr>
<td>Vacation</td>
<td>6.00</td>
<td>4/3/2023</td>
<td>Mrs. Anna L. Robinson</td>
<td>Submitted</td>
<td><img src="View" alt="Actions" /></td>
</tr>
</tbody>
</table>

The supervisor may also Reject the request since the leave was not entered as 4 or 8 hours.
Supervisors can only edit the leave request when the Status is **Submitted** or **Draft**. The supervisor can edit the Leave Type, Start Date or End Date, and/or Hours in the box. In this case, the supervisor must change the hours since the employee did not enter 4 or 8 or reject the request.

**Summary of all pending leave requests.**
The supervisor changes the total hours to 8 instead of 6 and clicks **Approve**.

The Actioner is the last person to make a change to the leave request.
When a supervisor makes changes, a comment box will appear for the supervisor to give a reason for the change.
The supervisor made a change to the leave request, but the employee let the supervisor know they were only taking a half day (4 hours) of vacation.

The supervisor must **Unapprove** to make changes.
The supervisor can edit the hours and then Approve. The supervisor must provide a Reason for modifying the leave request. Save when done.
After a leave request is approved, the employee is able to withdraw the request to make changes or delete on their end if necessary.
The supervisor will receive an email if an employee’s leave request is Withdrawn.

Sick leave request of 8.00 hours for
04/10/2023 - 04/10/2023 was withdrawn by Anna Robinson.

Please logon to Self-Service to review and approve this withdrawal.

Employee leave balances will not be updated until leave requests are approved by supervisors.
The supervisor must approve the withdrawal of the leave request by clicking **Approve Withdraw**. The hours will be restored to the leave balance after approval.

The supervisor may also **Reject Withdraw** which equates to declining the employee’s ability to make any changes to this specific request.
The supervisor should always check the comments to see why the request was withdrawn. All comments related to the specific leave request will appear.
The message below will appear to confirm the supervisor wants to **Approve Withdraw**. Once the supervisor approves the withdrawal, they will no longer be able to view the leave request. The leave request is sent back to the employee as a draft to make changes.
If the employee makes changes to the same request and resubmits, the supervisor will receive this email and will see the submitted request in Self-Service.
The supervisor must check the comments to see why the request was resubmitted. The supervisor can also make comments if necessary.
Once the supervisor reapproves the withdrawn request, the hours are taken out of the leave balance and the note next to Approved will remain.
VIEWING
LEAVE BALANCES
The supervisor can view Leave Balances using the Filter. If approved, future leave requests will be “Used” and the Balance will be reduced even if the dates of the leave have not occurred.
ADDING A PROXY
If the supervisor is unable to approve leave requests for any reason, they can assign a Proxy. Proxy's cannot approve their own leave requests.

Welcome to Colleague Employee Self-Service!

- **Tax Information**: Here you can change your consent for e-delivery of tax information.
- **Time Entry**: Here you can fill out your timecards.
- **Earnings Statements**: Here you can view your earnings statement history.
- **Employee Proxy**: Here you can delegate certain types of work tasks to another employee.
- **Banking Information**: Here you can view and update your banking information.
- **Time Approval**: Here you can approve or reject timecards for the people you supervise.
- **Faculty Contracts**: Here you can view your contract assignment details.
- **Leave**: Here you can view your leave balances and leave requests.
- **Time History**: Here you can view your paid timecards.
Step 1: Click **Add Proxy**
Step 2: Select Proxy Type **Leave Approval**
Step 3: Add the **Effective and Revoke Date**
Step 4: Search the name of the person you want to act a proxy for you and click their name.
Step 5: Click **Add Proxy**
In this example, no end date was given for this proxy. This is a good practice to be sure you have a backup approver in the case of an emergency. The supervisor could also assign a proxy if they are going on a vacation or long-term leave and add an revoke date.

Note: Proxy’s will receive all emails that supervisor receives. Proxy’s should only approve when instructed by a supervisor.
Please contact Human Resources at hure-mail@wittenberg.edu or 937-327-7517 with any questions or suggested edits to these instructions.