Instructions for Leave Reporting for Exempt Employees

Self-Service

https://selfservice.wittenberg.edu/
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).

EMPLOYEES – ONLY REPORT LEAVE 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 but not yet taken.

- 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.
- **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
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.
IMPORTANT VACATION POLICY DETAILS
(see full policy in Employee Manual)

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.
Once logged into **Self-Service**, choose **Employee**.

Please note: your options may be different than mine.
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.

- **Leave**
  Here you can view your leave balances and leave requests.

- **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.

- **Supervisor Employee Leave Balances**
  Leave Balances

- **Time History**
  Here you can view your paid timecards.

Please note: some of the options displayed are not active.
This is the home page for leaves. Here you can view **Leave Balances** and **Leave Requests**.

### Leave Balance

<table>
<thead>
<tr>
<th>Vacation (Hours)</th>
<th>Sick (Hours)</th>
</tr>
</thead>
<tbody>
<tr>
<td>0.00 Used</td>
<td>200.00 Balance</td>
</tr>
<tr>
<td>0.00 Used</td>
<td>192.00 Balance</td>
</tr>
</tbody>
</table>

**Vacation**: 25 days = 200 hours

**Sick**: 24 days = 192 hours

### Leave - As Of 4/11/2023

<table>
<thead>
<tr>
<th>Description</th>
<th>Starting Balance</th>
<th>Earned/Advanced-See Staff Manual</th>
<th>Used</th>
<th>Adjustments</th>
<th>Balance</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation-Exempt</td>
<td>0.00</td>
<td>200.00</td>
<td>0.00</td>
<td>0.00</td>
<td>200.00</td>
<td>View</td>
</tr>
<tr>
<td>Sick-Exempt</td>
<td>0.00</td>
<td>192.00</td>
<td>0.00</td>
<td>0.00</td>
<td>192.00</td>
<td></td>
</tr>
</tbody>
</table>
Scroll down to see a detailed description of all leave types.

**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).

Adjustments are for HR Office use only

See **Earned/Advanced** definitions on page 3 & Employee Manual.

**Balance** is the total hours you have available to use.
To request or report vacation or sick leave, click **Request Leave**.

You must “Request Leave” even if you are reporting leave taken in the past.
Choose the leave under **Select a Leave Type**. Enter the **Start Date** and **End Date**.
Add **Comments** for supervisors & HR to view. Please specify if the sick time falls under approved FMLA, Jury Duty, Bereavement or a Family Sick Day.

You may only enter time in the dates that you specified. The other dates are grayed out unless the start or end date is changed. **You must only enter 4 or 8 in the box.**

- 4 = half day
- 8 = full day
Save the request as a **Draft** for later as shown below. When the leave request is final, click **Submit**.
Once **Submitted**, a blue box will appear confirming the submission.

The employee can **Unsubmit** and make changes before the supervisor approves if necessary.

Note the pending 8 hours and the effective balance.

See page 18 to make changes after supervisors have approved.
The request will change to a draft for the employee to make changes or delete the request.

To make a change, simply adjust the dates and/or the hours entered.

Click **Submit** when changes are final.

Click here to delete.
In this scenario, the employee worked half a day instead of a full day, so they changed their hours to 4 instead of 8.
To add a new request, choose **Request Leave**.

Notice the Sick Leave Balance will not change until the request is approved.
Enter the Start and End Dates of the leave. The employee entered “0” on Saturday and Sunday since those are regular non-working days. The rest of the days must be entered as 4 (half day) or 8 (full day).

Any “0.00” in italics must be entered again as “0.00” or else you will receive an error.

Add Comments as needed and Submit when finished.
Once submitted, changes cannot be made unless the employee **Unsubmits**.
Important: Leave balances will not change until the supervisor approves!

Leave Balance

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<td>192.00 Balance</td>
</tr>
</tbody>
</table>

Leave Requests

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Total Hours</th>
<th>Date Range</th>
<th>Actioner</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>80.00</td>
<td>6/19/2023 - 6/30/2023</td>
<td>Ms. Marie Thompson</td>
<td>Submitted</td>
</tr>
<tr>
<td>Sick</td>
<td>4.00</td>
<td>4/11/2023</td>
<td>Ms. Marie Thompson</td>
<td>Submitted</td>
</tr>
</tbody>
</table>

Leave - As Of 4/11/2023

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<td>0.00</td>
<td>192.00</td>
<td>0.00</td>
<td>0.00</td>
<td>192.00</td>
<td>View</td>
</tr>
</tbody>
</table>
The supervisor has now approved the leave requests submitted. The Leave Balances have been updated to reflect these changes.

### Leave Balance

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<tr>
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<td>4.00 Used</td>
</tr>
<tr>
<td>120.00 Balance</td>
<td>188.00 Balance</td>
</tr>
</tbody>
</table>

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<table>
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<tr>
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<th>Total Hours</th>
<th>Date Range</th>
<th>Actioner</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>80.00</td>
<td>6/19/2023 - 6/30/2023</td>
<td>Mrs. Carol Nickson</td>
<td>Approved</td>
</tr>
<tr>
<td>Sick</td>
<td>4.00</td>
<td>4/11/2023</td>
<td>Mrs. Carol Nickson</td>
<td>Approved</td>
</tr>
</tbody>
</table>

### Leave - As Of 4/12/2023

<table>
<thead>
<tr>
<th>Description</th>
<th>Starting Balance</th>
<th>Earned/Advanced-See Staff Manual</th>
<th>Used</th>
<th>Adjustments</th>
<th>Balance</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation-Exempt</td>
<td>0.00</td>
<td>200.00</td>
<td>80.00</td>
<td>0.00</td>
<td>120.00</td>
<td>View</td>
</tr>
<tr>
<td>Sick-Exempt</td>
<td>0.00</td>
<td>192.00</td>
<td>4.00</td>
<td>0.00</td>
<td>188.00</td>
<td>View</td>
</tr>
</tbody>
</table>
**Scenario:** The employee’s vacation plans changed and they need to update the leave request that was already approved by the supervisor. The employee must **Withdraw** the request.
The employee must enter a reason for withdrawing the leave request. See example below. After entering a reason, choose **Withdraw**.

**Withdraw Leave Request**

- **Withdrawn By**: Ms. Marie Thompson
- **Date**: 4/12/2023
- **Reason**: I would like to edit my vacation leave request. We are now leaving on June 21 instead of June 19.

**SINCE THIS VACATION REQUEST WAS APPROVED ONCE ALREADY BY THE SUPERVISOR, THE SUPERVISOR ALSO MUST APPROVE THE WITHDRAW REQUEST.**
This is what the employee will see after submitting the withdrawal. They will not be able to edit until the supervisor approves the withdrawal. Email notifications will be sent to supervisors.
Notice the balance will not change until the supervisor approves the withdrawal. It is still showing 80 hours (10 days) of vacation leave was used.

<table>
<thead>
<tr>
<th>Description</th>
<th>Starting Balance</th>
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<td>200.00</td>
<td>80.00</td>
<td>0.00</td>
<td>120.00</td>
<td>...</td>
</tr>
</tbody>
</table>

View
Once the supervisor approves the withdrawal, the request returns to a draft and the balance is restored. The employee will receive email notification when the withdrawal is approved.
The employee and supervisor can see all past comments. When adjusting the withdrawn request, the employee should add a comment with the changes they are making to the request.

**Scenario:** The employee is adjusting the start date of the leave request. They are now leaving on June 21 instead of June 19. If they simply remove the hours on 6/19 and 6/20 and try to submit, they will receive the error on the next page.
If you receive a similar error, you must change the **Start Date**. Any “**0.00**” in italics must be entered again as “**0.00**” or else you will continue receiving an error.

Please enter leave hours on both 6/19/2023 and 6/30/2023.
Once submitted, you will see this note. Click or hover over the note view.
Once again, the leave balance will not change until the supervisor approves.
# Final Leave Balances after all approvals

## Leave Balance

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Total Hours</th>
<th>Date Range</th>
<th>Actioner</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation</td>
<td>64.00</td>
<td>6/21/2023 - 6/30/2023</td>
<td>Mrs. Carol Nickson</td>
</tr>
<tr>
<td>Sick</td>
<td>4.00</td>
<td>4/11/2023</td>
<td>Mrs. Carol Nickson</td>
</tr>
</tbody>
</table>

## Leave - As Of 4/17/2023

<table>
<thead>
<tr>
<th>Description</th>
<th>Starting Balance</th>
<th>Earned/Advanced-See Staff Manual</th>
<th>Used</th>
<th>Adjustments</th>
<th>Balance</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vacation-Exempt</td>
<td>0.00</td>
<td>200.00</td>
<td>64.00</td>
<td>0.00</td>
<td>136.00</td>
<td>View</td>
</tr>
<tr>
<td>Sick-Exempt</td>
<td>0.00</td>
<td>192.00</td>
<td>4.00</td>
<td>0.00</td>
<td>188.00</td>
<td>View</td>
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</tbody>
</table>
Please contact Human Resources at hure-mail@wittenberg.edu or 937-327-7517 with any questions or suggested edits to these instructions.