

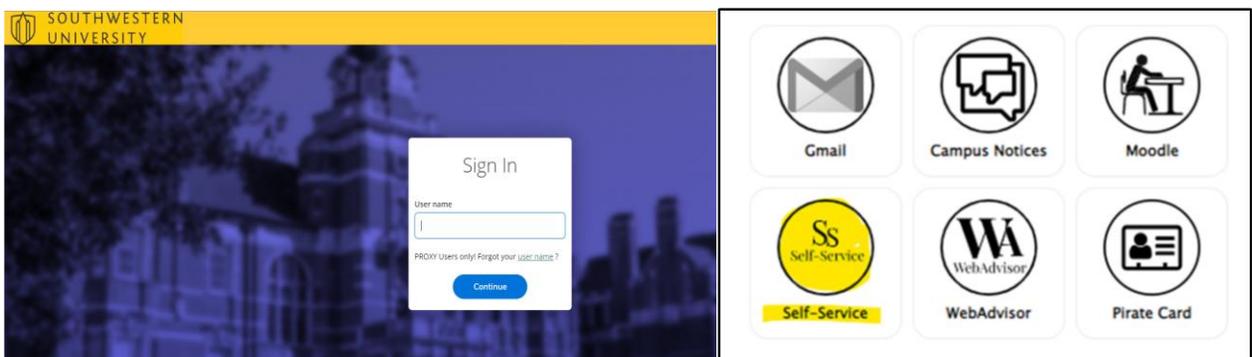
Monthly Exempt Employee Leave Entry Procedures

SELF-SERVICE MONTHLY LEAVE OVERVIEW:

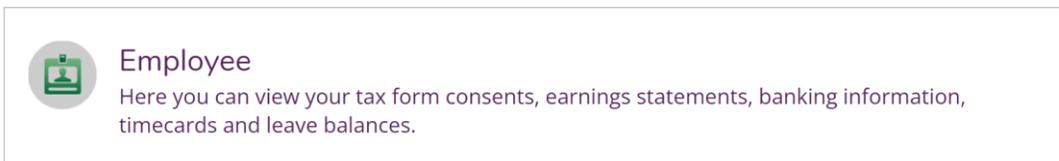
- Monthly employees enter their leave taken using Self-Service.
- Leave can be entered as often as preferred by the employee – daily, weekly or monthly.
- Entry Deadline: Leave taken should be entered **as soon as possible after the month ends, but no later than the 10th** of the following month. If adjustments are needed after that date, contact Pam Leatherwood.
- Leave can only be entered for the current calendar year. December Leave needs to be entered in December.
- Use the following instructions for entering Vacation Leave, Sick Leave, Summer Fun Days (SFO) leave, and No Leave for the Month (see page 5).
- Refer to pages 5-6 for special instructions for entering Bereavement Leave, Inclement Weather Leave, Emergency Related Approved Leave (ERAL), Family Medical Leave (FMLA) and Worker’s Compensation Leave (WC).
- Note that monthly employees no longer report holidays or jury duty.
- A separate “leave report” must be submitted for each day or sequential days for each different leave type.

ENTERING MONTHLY LEAVE IN SELF-SERVICE:

1. Access Self-Service by either going directly to Self-Service in a web browser using <https://selfservice.southwestern.edu/Student> (shown on the left below) or by going to My Southwestern at <https://www.southwestern.edu/my/> and selecting the Self-Service icon (shown on the right below.)



2. Once in Self-Service, select the “Employee” Option (shown below)



3. Select “Leave Balances and Leave Reporting” Option (shown below)



Leave Balances and Leave Reporting

Here staff can view leave balances and monthly employees can enter and submit leave reports.

Below is a screenshot of the Leave Balances and Leave Reporting screen:

- The upper left-hand corner displays an employee's vacation and sick leave hours used for the calendar year and balances.
- The upper right-hand corner is the “Report Leave” button for entering leave. This section also shows any leave entered, as well as the status of the leave.
- The bottom section shows the employee’s leave types and provides details of starting balance hours, earned hours, used hours, adjustments, and ending balance hours. You can select the links to see the details that make up the amounts for each type of leave.

Leave
Report Leave

Leave Balance



Vacation (Hours)

13.75 Used | 116.12 Balance



Sick (Hours)

0.00 Used | 340.44 Balance

Leave Reportings

Leave Type	Total Hours	Date Range	Actioner	Status
Sick	8.00	2/27/2023	Employee Name	Draft

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Per Page: 4
Total: 1

Leave - As Of 3/29/2023

Description	Starting Balance	Earned	Used	Adjustments	Balance	Actions
Sick Leave - Salaried	324.44	16.00	0.00	0.00	340.44	... View
Vacation - Standard Salaried	101.87	28.00	13.75	0.00	116.12	... View
Summer Fun-Days Off	0.00	0.00	0.00	0.00	0.00	... View
Inclement Weather Salaried	0.00	0.00	0.00	0.00	0.00	... View
Bereavement Leave Salaried	0.00	0.00	0.00	0.00	0.00	... View
No Leave for This Month	0.00	0.00	0.00	0.00	0.00	... View

4. To continue entering leave, select the “Report Leave” button in the upper right-hand corner. Each type of leave has to be entered separately.



The following Leave Reporting screen will appear:

The screenshot shows a 'Leave Report' form. At the top right, there are four yellow callout boxes labeled #9, #11, #8, and #10. Below the title, there is a 'New Report' section with icons for Save, Submit, Comments, and Delete. The main form area has a 'Leave Type' dropdown menu (callout #5), 'Start Date' and 'End Date' fields with calendar icons (callout #6), and a summary box on the right. The summary box contains the following text:

Current Leave Balance:	0.00 hours
Pending:	-0.00 hours
Effective Balance:	0.00 hours
Total Reported:	0.00 hours

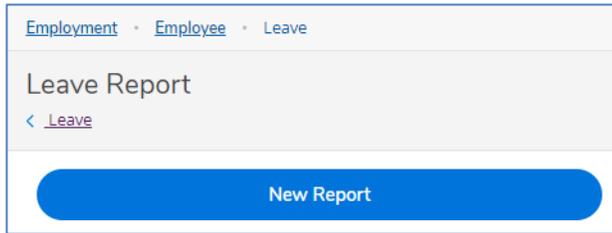
5. Select your Leave Type for your entry by using the drop-down arrow to identify your Leave Type. (Shown at #5 above)
6. Enter the Start Date and End Date, using a format of mm/dd/yyyy or click on the calendar to pick your dates. (Shown at #6 above)
7. Your selected date or date range will then appear with a default of 0.00 hours as shown below. Enter the total hours taken for each date.

SUN	MON	TUE	WED	THU	FRI	SAT
12	13	14	15	16	17	18
	0.00					

TIP –In order to enter sequential or multiple days for a specific leave type, the start and end dates of the leave span **MUST** have hours associated with the leave.

8. If you want to add a comment on this leave entry, select the “Comments” button on the upper right-hand side, enter your comment/message, then select “Add Comment” to save and return to the prior page. (Shown at #8 above)
9. To save your request, click on the “Save” button. (Shown at #9 above)

Save will create an entry in “Draft” mode. It will not be submitted to your supervisor until you select the “Submit” button.
10. Click “Delete” to remove your leave entry. (Shown at #10 above)
11. Click “Submit” to submit your leave entry to your supervisor for approval. (Shown at #11 above)
12. To enter your next leave entry, select “New Report” in the upper left-hand corner.



13. When all leave reports have been saved and/or submitted, return to the Leave Summary form by clicking on the “< Leave” link.



14. The Leave Summary form will display 3 sections: Leave Balances, Leave Reports, and Leave details as of the current date:

Leave

Leave Balance



Vacation (Hours)

13.75	116.12
Used	Balance



Sick (Hours)

7.00	333.44
Used	Balance

Leave Reports

Leave Type	Total Hours	Date Range	Actioner	Status
Vacation	8.00	2/17/2023	Employee Name	Submitted
Sick	5.00	2/10/2023	Employee Name	Submitted

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[Report Leave](#)

Leave - As Of 3/1/2023

Description	Starting Balance	Earned	Used	Adjustments	Balance	Actions
Sick Leave - Salaried	324.44	16.00	7.00	0.00	333.44	... View
Vacation - Standard Salaried	101.87	28.00	13.75	0.00	116.12	... View
Bereavement Leave Salaried	0.00	0.00	0.00	0.00	0.00	... View
Inclement Weather Salaried	0.00	0.00	0.00	0.00	0.00	... View
Summer Fun-Days Off Salaried	0.00	0.00	0.00	0.00	0.00	... View

- Leave Reports with the status of “Draft” have been created and saved but not submitted for approval.
- Leave Reports with the status of “Submitted” have been sent to your supervisor for approval.
- Leave Reports with the status of “Approved” have been approved by your supervisor.

NOTE – Once Leave Reports are approved by your supervisor, hours will automatically be deducted from your Leave Balance.

NO LEAVE TAKEN IN THE MONTH

Self-Service does not have a checkbox to indicate no leave was taken. Instead, a new leave type has been added to record no leave is taken. This will provide a way for you to communicate with your supervisor that you have not taken any leave for the month. Once approved a negative balance for this leave type will appear, which is fine since it does not affect your other leave balances.

The screenshot shows a leave reporting form. The 'Leave Type' dropdown is set to 'No Leave This Month'. The 'Start Date' and 'End Date' are both set to 3/31/2023. To the right, a summary box shows: Current Leave Balance: 0.00 hours, Pending: -0.00 hours, Effective Balance: 0.00 hours, and Total Reported: 1.00 hours. Below this is a calendar grid for the month of March 2023. The days are SUN 26, MON 27, TUE 28, WED 29, THU 30, FRI 31, and SAT 1. The Friday, 31st cell contains '1.00' and is highlighted with a blue border.

To enter no leave for the month:

1. Using the Leave Type dropdown, select “No Leave This Month”.
2. Using the month that no leave was taken, enter the last day of the month for both the Start Date and the End Date.
3. **Input 1.0 hour on the last day of the month.**
4. Save
5. Submit

ENTERING OTHER TYPES OF LEAVE:

Bereavement Leave and Inclement Weather Leave

Bereavement and Inclement Weather hours should be entered when appropriate using the prior instructions. These leave plans do not have a balance associated with them, so you will see a negative balance when used.

Emergency Related Approved Leave, Worker’s Compensation Leave, and Family Medical Leave (FMLA) are only available as leave types after completing the special request procedures and getting approval from the Human Resources (HR) Department. Once the applicable leave type has been assigned by HR, the approved leave type will appear on the leave screen in the drop-down menu and at bottom detail section. If your “balance” hours need to be adjusted, please contact HR.

SPECIAL ENTERING INSTRUCTIONS FOR FMLA & WORKER’S COMP LEAVE

➤ **Family Medical Leave (FMLA) Reporting (2 STEPS REQUIRED)**

1. Submit a leave report selecting the **FMLA** leave type with the appropriate

days/hours, **AND**

2. Submit another leave report for the same days/hours using Sick or Vacation Leave

➤ **Worker's Compensation Leave (WC) Reporting (2 STEPS REQUIRED)**

1. Submit a leave report selecting the **WC** leave type with the appropriate days/hours, **AND**

2. Submit another leave report for the same days/hours using Sick or Vacation Leave

EMAIL NOTIFICATIONS:

Reminders to Enter Time:

System generated emails will be automatically sent to monthly employees as a reminder to submit their monthly leave as follows:

- On the 1st of each month at 7 a.m.
- Again on the 4th of each month at 7 a.m. if leave is not already submitted
- Again on the 9th of each month at 7 a.m. if leave is not already submitted

Self-Service Emails:

Employees will receive an email notification when their supervisor has approved or rejected each leave report submitted. An example of approved sick leave is shown below:

“Your leave submission of 8.00 hours on 02/15/2023 for Sick Leave - Salaried has been approved by Supervisor X.”

QUESTIONS:

Please contact Pam Leatherwood at leatherp@southwestern.edu or ext. 1932 if you have problems entering your leave or have questions.