

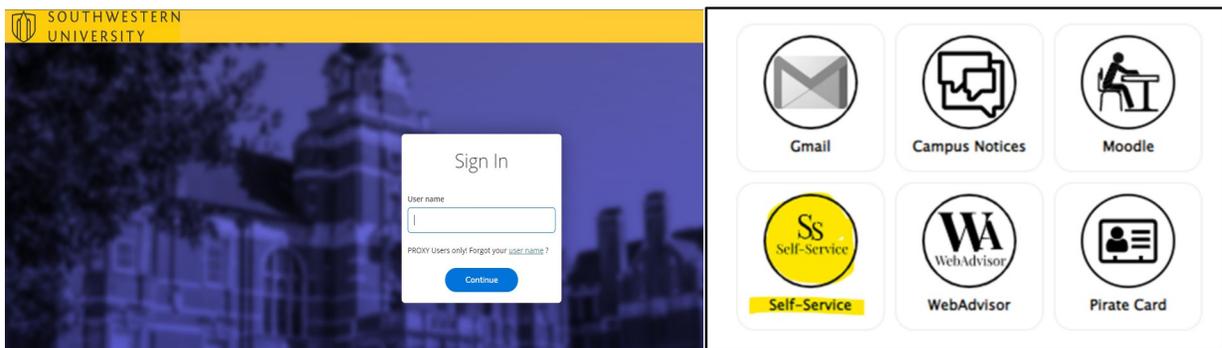
Monthly Exempt Employee Leave Time Supervisor Approval Procedures

SELF-SERVICE MONTHLY LEAVE OVERVIEW:

- Monthly employees enter their leave and supervisor approve/reject the leave in Self-Service.
- Leave can be entered as often as preferred by the employee/supervisor – daily, weekly or monthly.
- Entry Deadline: Leave taken should be entered by employees as soon as possible after month end, but no later than the 10th of the following month.
- Approval Deadline: Submitted time should be approved/rejected by supervisors no later than the 10th of the following month.
- Leave can only be entered for the current calendar year. December Leave needs to be entered in December.
- Monthly employees no longer report holidays or jury duty.
- All benefit eligible employees can enter the following types of leave: Vacation Leave, Sick Leave, Summer Fun Days (SFO), Bereavement, Inclement Weather, and No Leave for the Month (see page 3).
- Special approval is need from the Human Resource (HR) Department, before Emergency Related Approved Leave (ERAL), Family Medical Leave (FMLA) and Worker’s Compensation Leave (WC) leave plans are available to employees.
- **Employees using FMLA or WC leave must make two separate entries:** 1) to record the hours as FMLA/WC, and 2) to record the hours as Sick or Vacation.

REVIEWING 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)



Employee

Here you can view your tax form consents, earnings statements, banking information, timecards and leave balances.

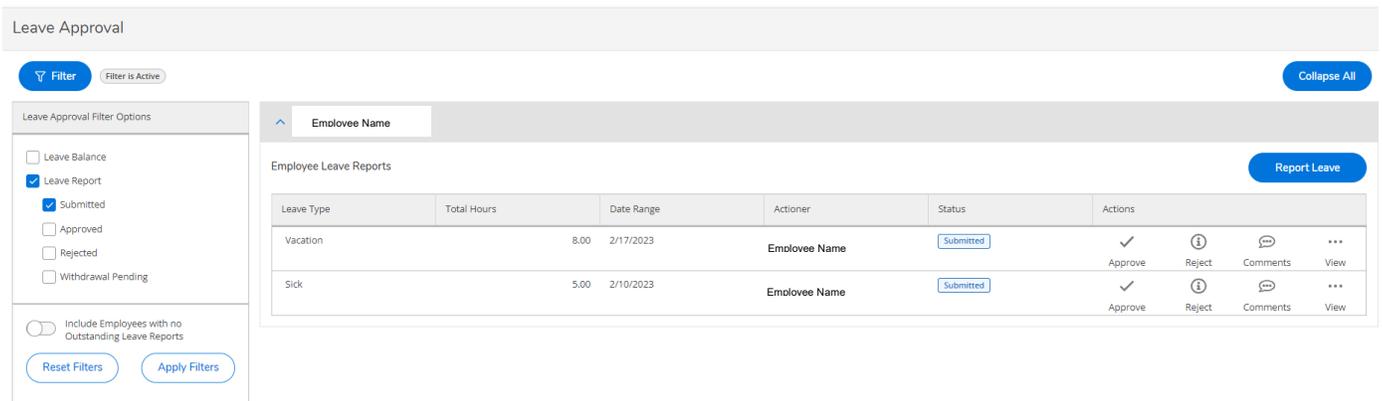
3. Then select the “Leave Approval” option.



Leave Approval

Here you can approve or reject leave reports for people you supervise.

Below is a screenshot of the supervisor’s “Leave Approval” screen, where leave will be Approved or Rejected for all applicable monthly employees using the steps below:



The screenshot shows the "Leave Approval" interface. On the left, there are "Leave Approval Filter Options" with checkboxes for "Leave Balance", "Leave Report" (checked), "Submitted" (checked), "Approved", "Rejected", and "Withdrawal Pending". There is also a toggle for "Include Employees with no Outstanding Leave Reports" and buttons for "Reset Filters" and "Apply Filters". The main area displays a table titled "Employee Leave Reports" with columns: Leave Type, Total Hours, Date Range, Actioner, Status, and Actions. Two rows are visible: "Vacation" (8.00 hours, 2/17/2023) and "Sick" (5.00 hours, 2/10/2023). Both have a "Submitted" status and "Approve", "Reject", "Comments", and "View" actions. A "Report Leave" button is in the top right.

4. Use the “Leave Approval Filter Options” to change your display.
 - All leave reports that need to be approved will show when “Leave Report” and “Submitted” are checked.
5. Pay careful attention to the employee’s name, leave type, hours, and date range while either approving or rejecting each leave entry/report.
6. If an entry is rejected, the supervisor must enter a rejection reason.
7. Leave can be approved or rejected on the summary page (shown above) or by selecting “View” at the end of each line to see the details.
8. Supervisors can select “comments” to see any employee’s comments and to also leave their own comments.
9. In cases when an employee cannot create/delete their own leave entries or failed to submit their leave for approval, the supervisor has the option to add, delete, or approve an employee’s leave.
10. Once leave is approved, the hours will automatically be deducted from the employee’s leave balance.

11. Do not approve leave for future months that is not due yet.

- Employees are able to enter and submit leave for future months. Supervisors should not approve any future leave until that month has passed to ensure it is accurate and to prevent a decrease in the employee’s leave balance prior to the leave being taken.

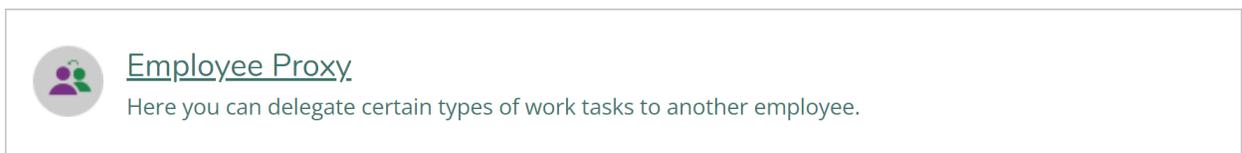
NO LEAVE TAKEN IN THE MONTH

Self-Service does not have a checkbox to indicate no leave was taken. Instead, a new leave type has been added to show no leave taken called “No Leave This Month”. This will provide a way for the employee and supervisor to communicate that leave was not taken for the month. Employees will enter the last day of the month for both the Start Date and the End Date and input 1.0 hour on the last day of the month. **This leave type needs to be approved also.**

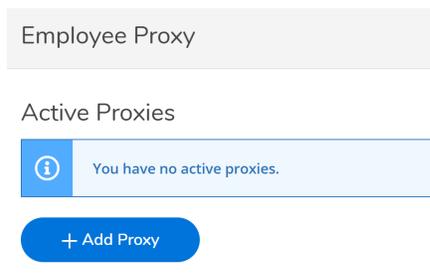
SETTING UP AN EMPLOYEE PROXY:

If a supervisor will not be available to review employee leave and needs to delegate the ability to approve/reject leave to another employee for a specific period of time, an employee proxy needs to be set-up in Self-Service.

1. Log in to Self-Service
2. Once in Self-Service, select the “Employee” option
3. Select the “Employee Proxy” option (shown below)



4. Select the “+Add Proxy” option



The following screen will then appear:

5. For Leave Reporting Approvals, use the drop-down to select “Leave Approval” in the Select Proxy Type box.
6. Add the “Effective Date” – it defaults to the current date, but can be changed to a future date if needed.
7. Add the “Revoke Date” to indicate when the proxy will end.
8. Enter the name of the proxy employee in the “Search for Proxy” box and click on the search icon.

The employee’s name can be entered as:
 First Name Last Name (e.g. John Smith)
 Last Name, First Name (e.g. Smith, John)

9. Select the appropriate employee name that appears under the search box.
10. Select the “Add Proxy” button at the bottom to complete the set-up process. An email will be sent to the employee to notify them that they have been added as your proxy.

11. The “Employee Proxies” screen will show all your active proxies. It also allows you to remove the proxy by selecting the red X at the end of the line.

Active Proxies				
Employee	Proxy Access	Effective Date	Revoke Date	
Employee Name	Leave Approval	3/1/2023	3/10/2023*	⊗

* Proxy access ends at 12:01 AM on this date.

[+ Add Proxy](#)

EMAIL NOTIFICATIONS:

System generated emails are automatically sent to monthly employees as a reminder to submit their leave as soon as possible, but no later than the 10th of the month, 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

System generated emails are also automatically sent to supervisors of monthly employees to report the status of their monthly employees' leave:

- 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 approved
- Again on the 9th of each month at 7 a.m. if leave is not started or already approved.

Self-Service Emails:

- When a monthly employee submits his/her leave time report, the supervisor will receive an email notification indicating the type of leave, number of hours, date(s) and employee name. The following is an example related to an employee's sick leave:
 "Sick Leave – Salaried leave report for 5.00 hours from 02/10/2023 - 02/10/2023 was submitted by Employee Name."
- An email notification will also be received if the employee unsubmitted time to make changes prior to the supervisor's approval.
- Employees will receive an email notification when their supervisor has approved or rejected their time. 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 approving your time or have questions.