

BANNER LEAVE OVERVIEW

- Log into your employee portal (www.trinidadstate.edu / 'portal' link at top)
- Enter your Username and password (Username is always your S number)
- Look for the Employee Self-Service card and click on the 'Open Employee Dashboard'
- Click on the 'continue' tab for Trinidad State College session (upper right corner)
- In the 'My Activities' area (*right side*) you will find available options (varies depending on your position)
 - Enter Leave Report
 - Request Time Off (*Leave Requests*)
 - Approve Time (*if in a supervisor position*)
 - Approve Leave Report (*if in a supervisor position*)
 - Approve Leave Request (*if in a supervisor position*)

Leave Report

(monthly employees due by the end of the month / bi-weekly/hourly employees pay day is also the leave report due date)

Leave reports are for the CURRENT MONTH

- ❖ To submit a leave report, click on the leave report tab
- ❖ You will see the available leave report for the current month (it will either show as 'Not started' or "In Progress")
- ❖ If it is not started you will click on the 'Start Leave Report' button (if it has been started click anywhere on the bar to open the current report)
- ❖ To view previously submitted leave reports, click on the 'Prior Periods' icon. You can also click on the drop-down arrow next to Leave Report Period to toggle between the current view and a monthly view.
- ❖ For the monthly view you can look at prior or upcoming months to see if there are leave reports available.
- ❖ If you have previously submitted a leave request and it has been approved for this reporting period, when you start your leave report it will pull those hours in so you will not need to re-enter them. By the same token, if you submitted leave on a leave request that you didn't use, you will need to remove those from the leave report because they will also be pulled in.
- ❖ Leave reports are done by pay periods, mostly for monthly employees, and are due on the first day of the following month. The due date is the 'submit by line on the right-hand side of your screen'. You may submit your report earlier than the due date, but once submitted, leave cannot be added. If you submitted your leave report and it has not been approved, you can click on the Recall Leave Report button, make changes and re-submit the report. If the supervisor has already approved it, those hours are locked and cannot be edited. You will need to contact the HR department for any corrections that need to be made.

- ❖ Meeting deadlines and completing your leave report accurately is critical for compliance. Remember, you are responsible for keeping track of your leave balances to make sure that you have sufficient leave for the hours you are reporting. If you use more leave than you have available, it will affect the balance of other leave types depending upon the leave setup. Coordinate with your supervisor if you use more time than you have.
- ❖ On the upper left-hand side of the screen, you have your position title, your position number, your organizational code, and the description of your organization. On the right side of the screen, you have Restart Leave Report and Leave Balances.
- ❖ Restart Leave Report will erase all the time that you have entered that was pulled in from the leave request.
- ❖ Leave Balance will take you to the full leave balance screen. You can go forward or backward clicking on the arrows on the left and right side of the calendar screen.
- ❖ When entering time on your leave report, select the day, and then select the Earn Code drop-down list. This Earn Code drop-down list will vary depending on your eClass. You will see Annual Leave, Sick leave, and potentially other options. Click on the option used for that day (example: Annual leave).
- ❖ Next enter the total hours you were absent that day (example: 4.5) in the hours box. You can only enter total hours absent for the day, not specific time frames. Time can only be entered in whole and partial numbers. Remember, partial hours need to be listed in increments of $\frac{1}{4}$ hour or 0.25 / 0.50 / 0.75.
- ❖ After you enter the hours select the 'Save' button on the bottom right-hand side of the screen. Please make sure to save your time before you click on the next day.
- ❖ Leave reports will allow you to enter time from the first day of the month to the last day of the month.
- ❖ You can edit already saved hours on a day. You can copy days (if taking multiple days with same hours) – this will open a monthly calendar that you can select the days you want to copy hours on and then click 'save'.
- ❖ If you have insufficient hours available for the time you entered, a yellow bar will appear across the top of the screen that says, "Leave Report Messages". When you click on the drop-down list you will see the messages.
If it lists insufficient leave balance, this is a notice that you do not have sufficient hours to cover your inputted requests off. You will need to notify your supervisor to make a manual report for leave without pay.
- ❖ Once you have entered all your hours, select the Preview button at the bottom right-hand side of your screen for the next step. Once you click 'preview' it will open up a leave report detail summary. This will be a preview of your leave taken and the total number of hours for the month. The first section is Time Entry Detail, which shows you the days you took leave, the earn codes used, and the total number of hours. The next section is a summary that summarizes the leave took for the month and the total number of hours per week per earn code. The next section is routing and status. It shows when you opened your leave report, the due date or submit by date, your supervisor's name, and the action for supervisor will be in the queue because when you submit the leave report, you are putting it in the queue for the supervisor to approve. The next

section is an optional comment box. You can leave a message for your supervisor in this box. Remember, the comment box is for the whole month, so if you are commenting on specific days or hours on the report, you will need to note that information in your comment.

- ❖ When you completed the comment section, the report is ready for submission. Verify that all the hours and information is correct, check the box to certify that your leave is accurate and then click the submit button on the lower right-hand side of your screen.
- ❖ If you need to make changes, click on the 'Return' button in the lower right hand of your screen and then you will click on the 'Recall Leave Report' button. This opens up the leave report so you can enter new days or edit current hours already entered. Once you've saved any changes you've made, click on the preview and once you confirm everything is accurate on the list, go ahead and certify again and submit.
- ❖ It is important to report your leave request accurately. Your leave report should be a true and accurate reflection of the leave type and hours you've used. Meet all leave report deadlines. If you are going to be out, plan ahead to ensure that your leave report is submitted on or before the deadline.
- ❖ Report issues promptly. Communicate with both your supervisor and HR department as soon as possible if issues or errors are identified.
- ❖ **Note:** Hourly/Bi-weekly employees will be submitting Leave Reports every two weeks and hours must match hours submitted on their timesheets.

Leave Request (should be submitted by the middle of the prior month or sooner)

Leave requests are for FUTURE MONTHS

- ❖ If you are aware of time you need to request off for FUTURE months, complete and submit a leave request
- ❖ Click on the 'Request Time off' link on the right-hand side of your screen
- ❖ In the upper right-hand side of the screen there is a toggle that will give you the option to look at leave request period or monthly view
- ❖ In the leave request period view you will see the available months that you can make requests
- ❖ Click on the month you need to request off by clicking on the box 'Start Leave Request'
- ❖ This will open calendar for that month.
- ❖ When entering time on your leave request select the day, and then select the Earn Code drop-down list.
This Earn Code drop-down list will vary depending on your eClass. You will see Annual Leave, Sick leave, and potentially other options. Click on the option used for that day (*example: Annual leave*).
- ❖ Next enter the total hours you were absent that day (*example: 4.5*) in the hours box. You can only enter total hours absent for the day, not specific time frames. Time can only be entered in whole and partial numbers. Remember, partial hours need to be listed in increments of ¼ hour or 0.25 / 0.50 / 0.75.
- ❖ After you enter the hours select the 'Save' button on the bottom right-hand side of the screen. Please make sure to save your time before you click on the next day.
- ❖ Leave requests will allow you to enter time from the first day of the month to the last day of the month.

- ❖ If you have days in a following month, you will need to open that month to enter your request off time.
- ❖ You can edit already saved hours on a day. You can copy days (if taking multiple days with same hours) – this will open a monthly calendar that you can select the days you want to copy hours on and then click ‘save’.
- ❖ Once you have entered all your hours, select the Preview button at the bottom right-hand side of your screen for the next step. Once you click ‘preview’ it will open up a leave report detail summary. This will be a preview of your leave taken and the total number of hours for the month. The first section is Time Entry Detail, which shows you the days you took leave, the earn codes used, and the total number of hours. The next section is a summary that summarizes the leave took for the month and the total number of hours per week per earn code. The next section is routing and status. It shows when you opened your leave report, the due date or submit by date, your supervisor’s name, and the action for supervisor will be in the queue because when you submit the leave report, you are putting it in the queue for the supervisor to approve. The next section is an optional comment box. You can leave a message for your supervisor in this box. Remember, the comment box is for the whole month, so if you are commenting on specific days or hours on the report, you will need to note that information in your comment.
- ❖ When you completed the comment section, the report is ready for submission. Verify that all the hours and information is correct, check the box to certify that your leave is accurate and then click the submit button on the lower right-hand side of your screen.
- ❖ If you need to make changes, click on the ‘Return’ button in the lower right hand of your screen and then you will click on the ‘Recall Leave Report’ button. This opens up the leave report so you can enter new days or edit current hours already entered. Once you’ve saved any changes you’ve made, click on the preview and once you confirm everything is accurate on the list, go ahead and certify again and submit.
- ❖ Once the Leave Request is approved by your supervisor, it will feed the requested hours into the appropriate months Leave Report. This will save you from having to re-enter those hours on your time report. Remember, if you do not use the hours that you requested, you will need to delete those hours on the appropriate Leave Report.
- ❖ If you click ‘Start Leave Request’ and do not enter any hours, you must delete the report or it will create errors when you attempt to do your Leave Report. In the upper right corner click on the ‘Cancel Request’ button and then click the ‘yes’ option to delete the opened request. It will then show the status as ‘Not started’.
- ❖ If a request has been opened it will show ‘In Progress’ as the status. You can click on the bar and open it to add additional days/hours off (*or to ‘Cancel Request’ if you have no hours for the month and had opened it*)
- ❖ All requests must be submitted prior to the end of that month. Remember, Leave Requests are for future months NOT the current month. If you are entering hours for the current month, you always enter those on your Leave Report (*not the Leave Request*).
- ❖ If you submit a Leave Request and need to make changes you can recall it (*as long as your supervisor has not already approved it*) to make changes. You will need to save the changes and re-submit them prior to the end of the month.

- ❖ Report issues promptly. Communicate with both your supervisor and HR department as soon as possible if issues or errors are identified.

Leave Balances

- To view your available leave balances, open your Employee Dashboard from your Employee Self-Service card and click on the 'continue' button
- In upper right corner of the page (*above the 'My Activities' section*) you will see an option listed as 'Full Leave Balance Information'. Click on this to open your balance details.
- This will open a summary of your leave balances as of the current date.
- It will display all types of leave balances and how many hours you currently have available.
- Beginning Balance: lists your leave balance as of the current date
- Earned Balance: is your leave accrued to the current date
- Taken: is leave taken through the current date
- Available balance is a calculation of Available Beginning plus Earned minus Taken

NEED HELP?

Portal Login help

The TSC Support Desk is staffed from 8:00 am to noon and 1:00 pm to 5:00 pm.

Support Desk: 719-846-5663 – Trinidad / 719-589-7105 – Alamosa / For after-hours changing of passwords for Portal, call 1-888-800-9198.

HR Department: 719-846-5534 Trinidad (Krystalee Moreno) / 719-846-5538 Alamosa (Yvette Atencio)

Payroll Department: 719-846-5570 (Blanca Menendez)