



Self-Serve Banner 9

Timesheet Entry Instructions

Table of Contents

Accessing Self-Serve Banner	2
Entering Hours in Your Timesheet	3
Accessing Leave Balances.....	5
Initiating Electronic Consent for Form W-2.....	6
Timesheet Entry Quick Reference Sheet	8

Accessing Self-Serve Banner

- 1) From your computer or mobile device, log in to <https://pilots.up.edu> with your assigned username and password.
- 2) Click on the **Self-Serve Banner** (SSB) button.
- 3) This will bring you to the **Employee Dashboard** which is broken down into three sections:
 - a. Leave Balances & Employee Profile
 - b. Pay Information
 - c. My Activities

University of Portland

Employee Dashboard

Leave Balances as of 03/02/2023

Sick leave in hours 1.25

Full Leave Balance Information

My Profile

Pay Information

Latest Pay Stub: 02/10/2023 All Pay Stubs Direct Deposit Information Deductions History

Earnings

Benefits

Taxes

Job Summary

Employee Summary

My Activities

Enter Time

- 4) To navigate to other self-serve platforms such as **Financial Aid** or **Student Accounts**, click on the **Banner Menu** icon located on the upper left corner of the page.

University of Portland

< Banner

Personal Information >

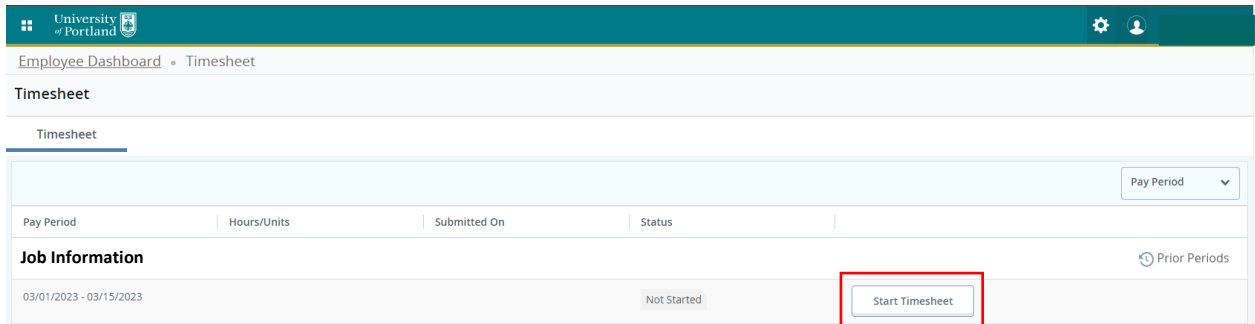
Financial Aid

Student Accounts

Employee >

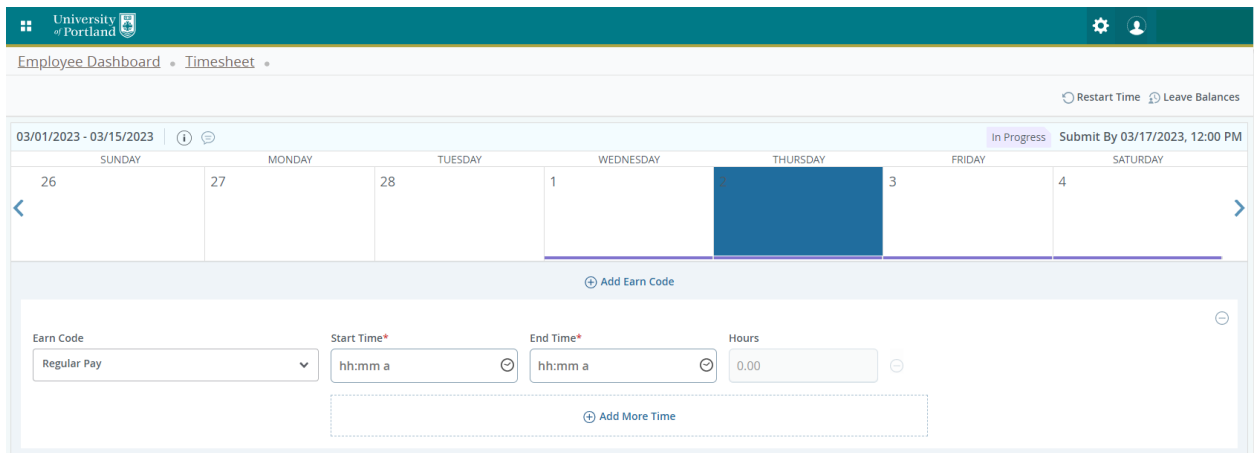
Entering Hours in Your Timesheet

- 1) From the Employee Dashboard click **Enter Time** located under **My Activities**. This will lead to you to the current pay period where you will click on **Start Timesheet**.



The screenshot shows the University of Portland Employee Dashboard. The breadcrumb trail is "Employee Dashboard > Timesheet". The page title is "Timesheet". Below the title, there is a "Pay Period" dropdown menu. The main content area is a table with columns: "Pay Period", "Hours/Units", "Submitted On", and "Status". The current row shows the pay period "03/01/2023 - 03/15/2023" and the status "Not Started". A "Start Timesheet" button is located in the bottom right corner of the table, highlighted with a red box. There is also a "Prior Periods" link on the right side of the table.

- 2) Once you are in your timesheet, you will click on the date that you would like to add hours to. The date selected will be highlighted in blue. Use the **arrow buttons** to navigate to other weeks within the pay period. Use the drop-down menu from the **Earn Code** field to begin entering in hours for your selected date.



The screenshot shows the University of Portland Employee Dashboard. The breadcrumb trail is "Employee Dashboard > Timesheet". The page title is "Timesheet". Below the title, there is a "Restart Time" and "Leave Balances" link. The main content area is a calendar view for the pay period "03/01/2023 - 03/15/2023". The calendar shows days from Sunday (26) to Saturday (4). The date 3 (Thursday) is highlighted in blue. Below the calendar, there is an "Add Earn Code" form. The form has fields for "Earn Code" (set to "Regular Pay"), "Start Time*" (hh:mm a), "End Time*" (hh:mm a), and "Hours" (0.00). There is also an "Add More Time" button below the form.

- 3) The **Earn Code** field will default to **Regular Pay** for all users and options available will depend upon your position. Monthly employees will not need to report regular hours, only leave hours such as sick, vacation, jury duty and bereavement time-off.

- 4) After you make your earning selection, input the **Start Time** and **End Time** of your shift at intervals of 15 minutes. For example, 10:00 am, 10:15 am, 10:30 am or 10:45 am. Click on **Add More Time** to add hours worked on another shift or a return from your lunch break. **Save** your entry once complete.

The screenshot shows a form for entering time. On the left, there is a dropdown menu for 'Earn Code' with 'Regular Pay' selected. To the right, there are two rows of input fields. The first row has 'Start Time*' (08:00 AM), 'End Time*' (12:00 PM), and 'Hours' (4.00). The second row has 'Start Time*' (01:00 PM), 'End Time*' (04:30 PM), and 'Hours' (3.50). A red box highlights the 'Start Time*', 'End Time*', and 'Hours' fields for both rows, along with an 'Add More Time' button below them. At the bottom right, there are three buttons: 'Cancel', 'Save' (highlighted with a red box), and 'Preview'. An 'Exit Page' link is at the bottom left.

- 5) Once saved, the total time will appear in the daily box. While the pay period is still open, you will be able to **Edit**, **Copy** or **Delete** your entries as needed. To do so, select the date in question and choose your option.
- To edit the time after it has been saved click this icon –
 - To copy the time to another day, click this icon –
 - To delete an entry from the day, click this icon –

The screenshot shows the 'Employee Dashboard' for 'Timesheet'. The top header includes the University of Portland logo and navigation icons. Below the header, there are links for 'Restart Time' and 'Leave Balances'. The main area shows a calendar for the period '03/01/2023 - 03/15/2023' with a total of '7.50 Hours'. A blue bar on Thursday indicates the logged hours. Below the calendar, there is a section for 'Add Earn Code' with two entries: 'Regular Pay' for '08:00 AM - 12:00 PM | 4.00 Hours' and 'Regular Pay' for '01:00 PM - 04:30 PM | 3.50 Hours'. A red box highlights the edit (pencil), copy, and delete (minus) icons for the first entry. At the bottom right, there is a 'Total: 7.50 Hours' and a link for 'Account Distribution'.

- When all hours for the pay period have been entered, click **Preview** located on the bottom right of the timesheet. This will take you to the **Timesheet Detail Summary** screen where you can review your timesheet and **Submit** to your supervisor for approval.

Employee Dashboard | Timesheet | Preview

Timesheet Detail Summary

Pay Period: 03/01/2023 - 03/15/2023 | 13.00 Hours | In Progress | **Submit By 03/17/2023, 12:00 PM**

Time Entry Detail			
Date	Earn Code	Shift	Total
03/02/2023	REG, Regular Pay	1	7.50 Hours
03/06/2023	SIC, Sick Pay	1	2.00 Hours
03/08/2023	REG, Regular Pay	1	3.50 Hours

Time Information									
Date	Earn Code	Shift	Hours/Units	Time In	System In	Comment In	Time Out	System Out	Comment Out
03/02/2023	REG, Regular Pay	1	4.00	08:00 AM			12:00 PM		
03/02/2023	REG, Regular Pay	1	3.50	01:00 PM			04:30 PM		
03/06/2023	SIC, Sick Pay	1	2.00	08:00 AM			10:00 AM		
03/08/2023	REG, Regular Pay	1	3.50	08:00 AM			11:30 AM		

Summary					
Earn Code	Shift	Week 1	Week 2	Week 3	Total
REG, Regular Pay	1	7.50	3.50		11.00 Hours
SIC, Sick Pay	1		2.00		2.00 Hours
Total Hours		7.50	5.50		

Routing and Status		
Name	Action	Date & Time
	Originated	03/02/2023, 09:43 AM
	In the Queue	

Comment (Optional):
Add Comment

Return Submit

- Corrections can still be made to your timecard prior to the submission deadline by clicking **Return** and accessing your timesheet.

Accessing Leave Balances

In the first 90 days, new employees will not see their sick and vacation time on their timesheets, however it is accruing. You can review your available balances from the **Employee Dashboard**.

- To view the details of your leave balances, click on **Full Leave Balance Information** from the dashboard.

Employee Dashboard

Leave Balances as of 03/02/2023

Sick leave in hours 1.25

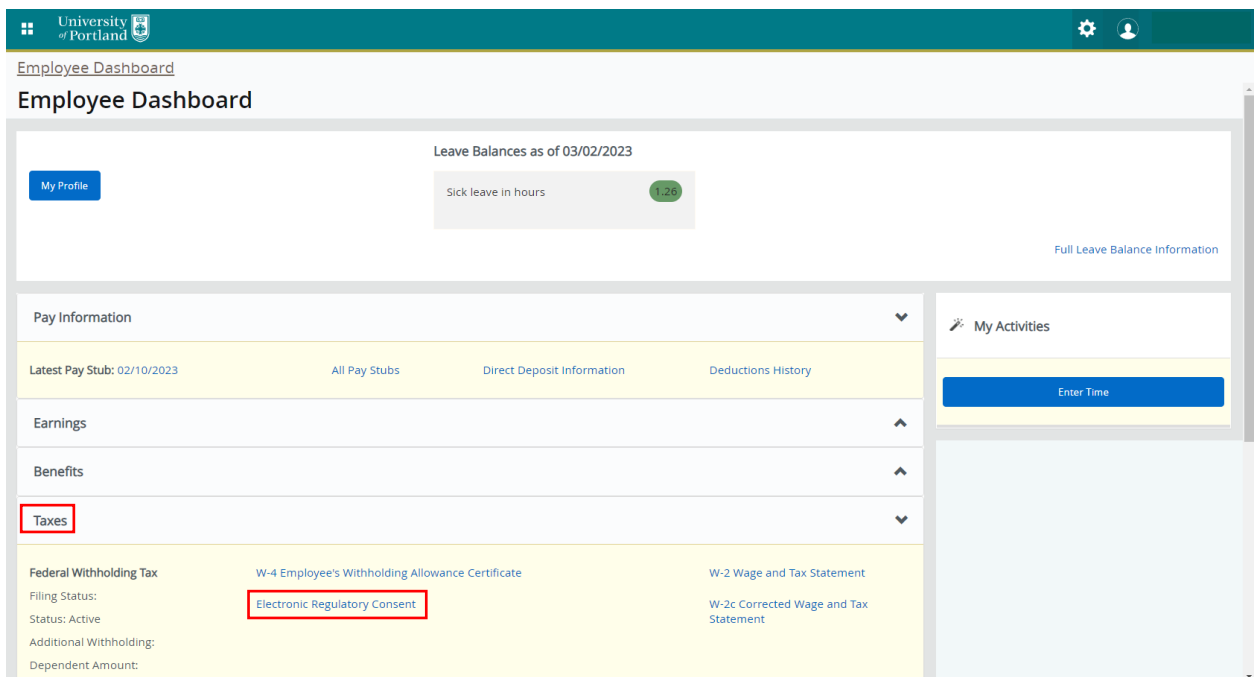
Full Leave Balance Information

Leave Balances as of 03/02/2023	
Sick leave	
Beginning Balance	0.00
Earned	23.76
Taken	22.50
Sick leave in hours	1.25

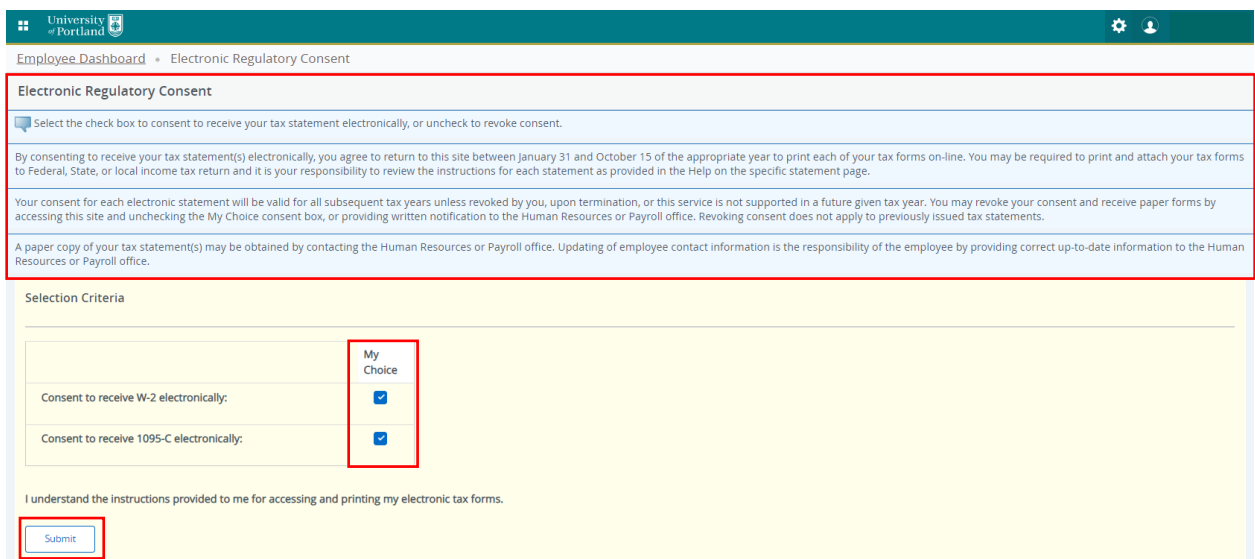
Initiating Electronic Consent for Form W-2

Signing up to receive your annual form W-2 electronically means you won't have to wait for your copy in the mail. When your form is available you will receive an email notification to retrieve your document.

- 1) Starting from the **Employee Dashboard**, select **Taxes** and click on **Electronic Regulatory Consent**.



- 2) Carefully read the **Electronic Regulatory Consent** statement and check the boxes in the **Selection Criteria** section and **Submit** your consent.



- 3) To print your form W-2, navigate to the **Employee Dashboard**, select **Taxes** and click on **W-2 Wages and Tax Statement**.

The screenshot shows the University of Portland Employee Dashboard. At the top, there is a navigation bar with the university logo and a user profile icon. Below the navigation bar, the page title is "Employee Dashboard". The main content area is divided into several sections. On the left, there is a "My Profile" button. To the right, there is a "Leave Balances as of 03/02/2023" section with a "Sick leave in hours" indicator showing 126. Below this, there is a "Pay Information" section with a dropdown arrow. The "Pay Information" section is expanded to show "Latest Pay Stub: 02/10/2023", "All Pay Stubs", "Direct Deposit Information", and "Deductions History". Below "Pay Information" are sections for "Earnings", "Benefits", and "Taxes". The "Taxes" section is highlighted with a red box and contains a dropdown arrow. Below "Taxes", there are three links: "Federal Withholding Tax", "W-4 Employee's Withholding Allowance Certificate", and "W-2 Wage and Tax Statement". The "W-2 Wage and Tax Statement" link is highlighted with a red box. To the right of the "Taxes" section, there is a "My Activities" section with an "Enter Time" button.

- 4) From the **Tax Year** drop-down menu, select the appropriate year and click **Display**. On the bottom left corner, click the button labeled **Printable W-2** to get your physical document.

The screenshot shows the University of Portland W-2 Wage and Tax Statement page. At the top, there is a navigation bar with the university logo and a user profile icon. Below the navigation bar, the page title is "W-2 Wage and Tax Statement". The main content area is a light yellow background. At the top of the main content area, there is a note: "You may adjust the display size by selecting View in the menu at the top of your browser." Below this note, there are two dropdown menus. The first is labeled "Tax Year:" and has "2022" selected. The second is labeled "Employer or Institution:" and has "University of Portland" selected. Below the dropdown menus, there is a "Display" button highlighted with a red box.

Timesheet Entry Quick Reference Sheet

- 1) Log into your account from <https://pilots.up.edu> and click on the self-serve Banner icon.
- 2) Click on **Enter Time** and **Start Timesheet** to access your current pay period timesheet.
- 3) Navigate through your timecard by clicking on the **arrows** and click on a date to select it. The selected day will be highlighted in blue when selected.
- 4) Chose your **Earn Code** from the drop-down menu.
- 5) Enter your **Start Time** and **Stop Time** in 15-minute intervals. Hours should be entered this format – **HH:MM** indicating **AM** or **PM**. Click **Save** to complete the entry.
- 6) To add additional shifts or time after a lunch period, click on **Add More Time**.
- 7) Once the pay period is complete, click **Preview** to review your entries in **Timesheet Detail Summary**.
- 8) Click **Submit** to send your timecard to your supervisor for approval.