University of Portland

Self-Serve Banner 9

Timesheet Approvers Guide

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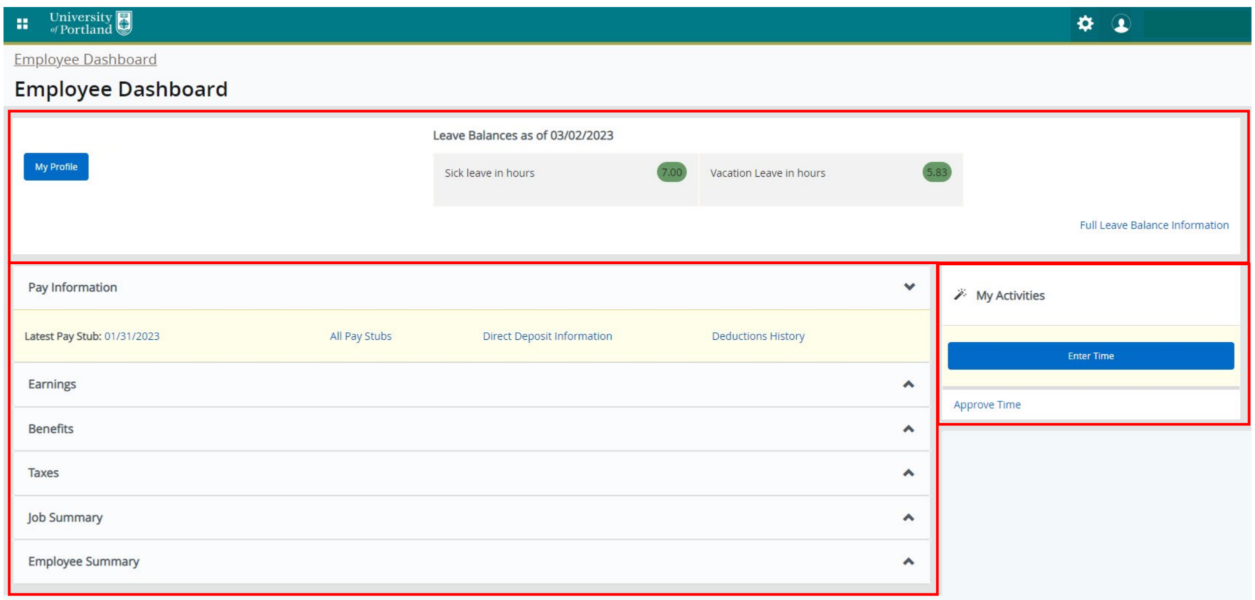
Accessing Self-Serve Banner

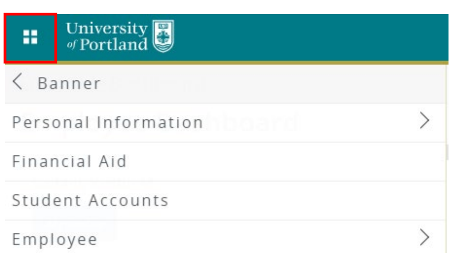
1) From your computer or mobile device, log in to https://pilots.up.edu with your assigned username and password.

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

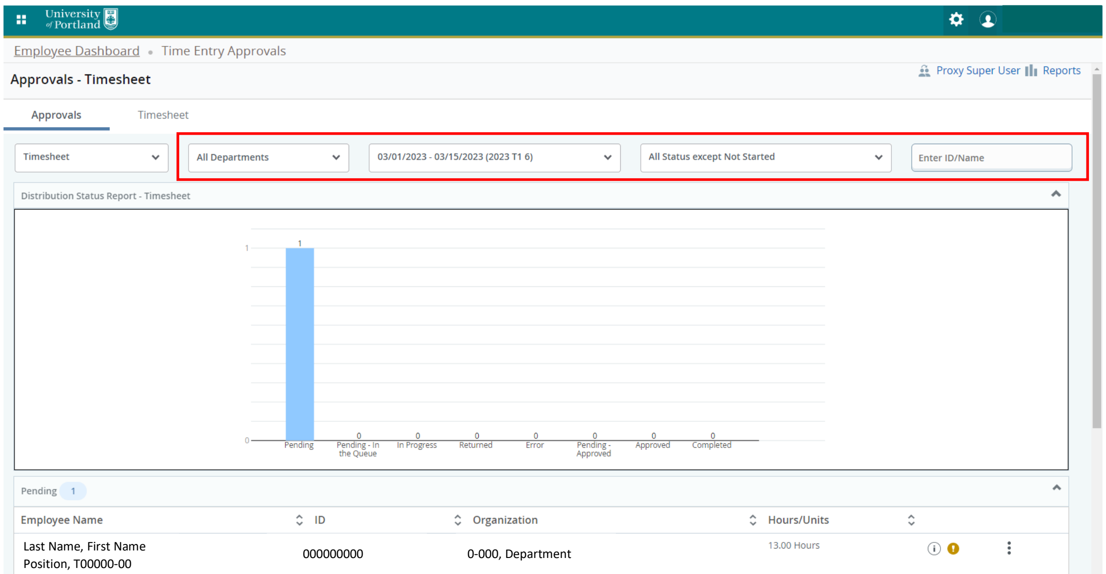


4) To navigate to other self-serve platforms such as **Financial Aid** or **Student Accounts**, click on the **Banner Menu** icon located on the upper left corner of the page.

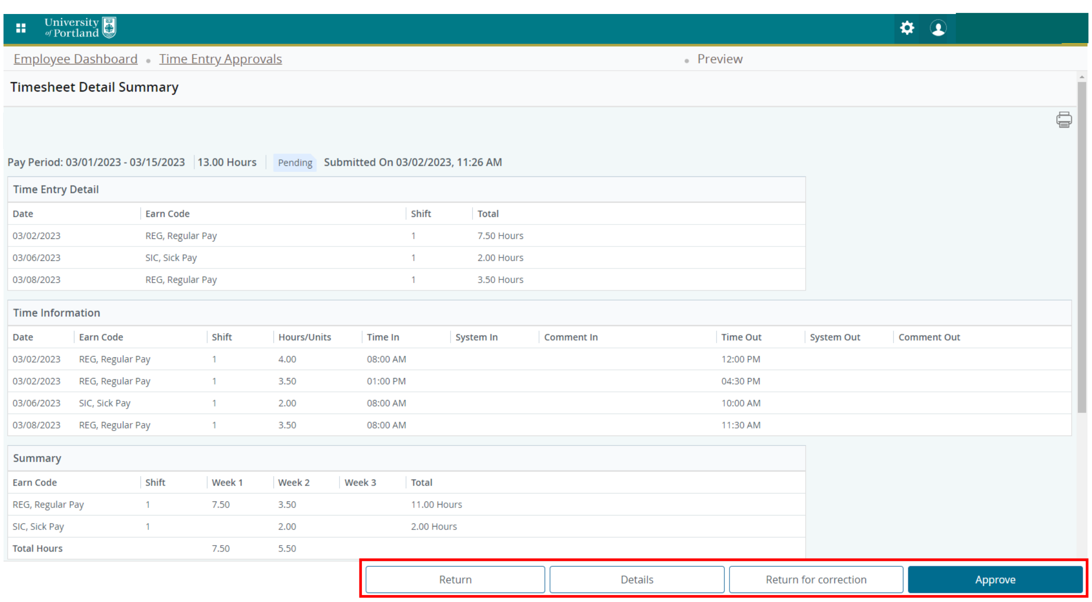


Approving Employee Timesheets

1) From the **Employee Dashboard** click on **Approve Time** located under **My Activities**. From the available drop-down menus update the **Department**, **Pay Period**, and **Status** as needed. You may also search for a specific employee by name or ID number.



2) Click on each employee's name to view details of their timesheet. Here you will have 4 actions that you can take on the screen.
   a. **Approve** – Sign off the timesheet and finalize for payroll
   b. **Return for Correction** – Send the timesheet back to the employee to make an adjustment
   c. **Details** – Access the employees timesheet and make an adjustment on their behalf
   d. **Return** – Navigate back to the timesheet approval main page

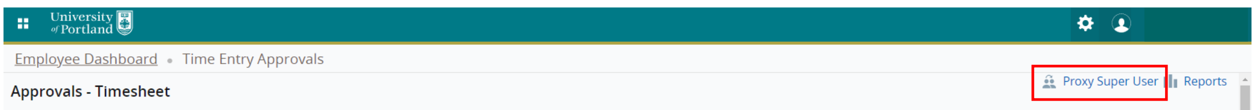


*Note: You will be able to see your employee timecards in multiple stages of the process. But you will only be able to approve those timesheets in **Pending** status.*

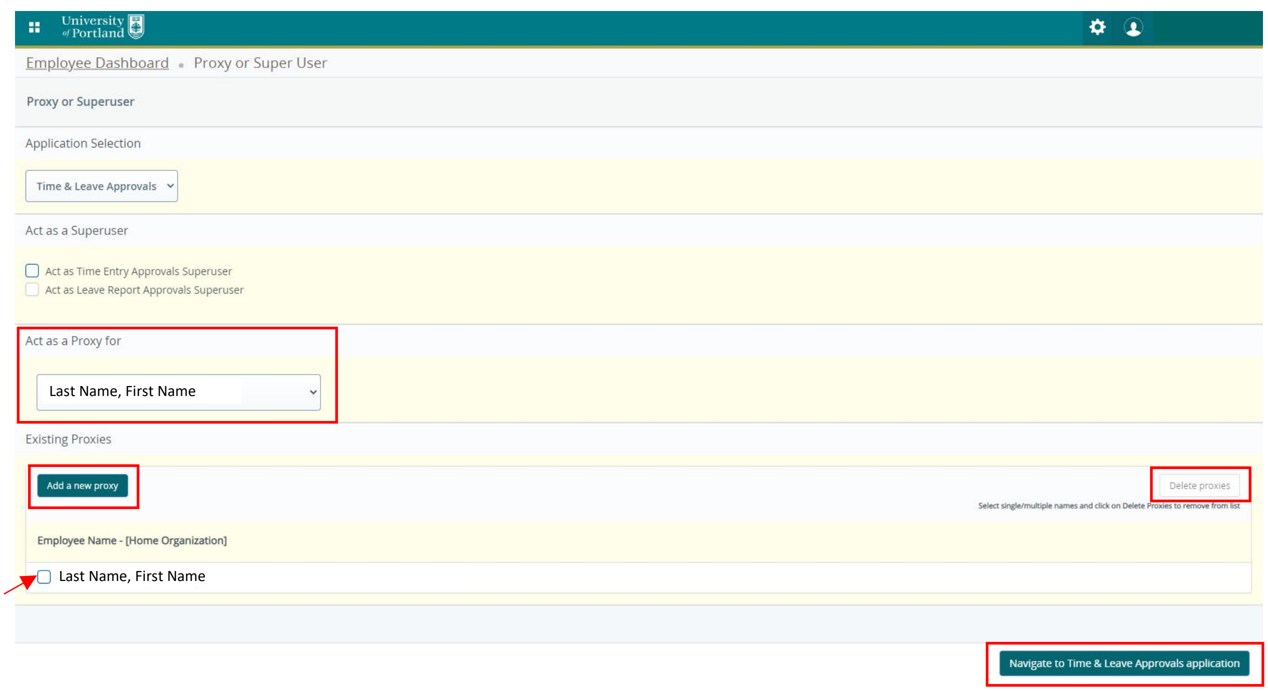
Assigning a Timecard Proxy

Each supervisor must have one or more proxies within self-serve who can approve timesheets in their absence. A proxy cannot be a student employee. The proxy must be able to verify that the employee has worked the hours submitted.

1) From the **Employee Dashboard** click on **Approve Time** and **Proxy Super User** from the upper right.



2) Click on the **Add a New Proxy** button to create a new relationship. Should you need to remove the proxy in the future, check the box next to their name and click **Delete Proxies**.



3) If you are designated as a proxy for another supervisor, you can act as them by selecting their name from the **Act as a Proxy for** drop-down menu and then clicking **Navigate to Time & Leave Approvals application.**

Timesheet Approvers Quick Reference Guide

1) Log into your account from https://pilots.up.edu and click on the self-serve Banner icon.

2) Click on **Approve Time** and adjust the **Department, Pay Period** and **Status** as needed.

3) Select your employees in **Pending** status by clicking on the names to view the timesheet details.

4) If deemed correct, click **Approve** to finalize the timecard for payroll.
    a. If corrections are needed choose **Return for Correction** if prior to the due date/time for the employee to fix.
    b. To make corrections to the employee's timesheet yourself, choose **Details** and select the date in question to make changes.

5) Click on **Return** to go back to the previous menu and select the next employee timesheet.

6) To add a proxy to approve timesheets in your absence, click **Approve Time** and **Proxy Super User**.

7) Select the **Add a new proxy** button and find your desired proxy from the list.

8) To act as a proxy for another user, select their name from the **Act as a Proxy for** drop-down menu and then click **Navigate to Time & Leave Approvals application**.
    a. A use must first set you up as a proxy before they will appear in this drop-down list.

Frequently Asked Questions

When do I need to approve timesheets?

- **Semi-Monthly** – employee timesheet submissions are due 5 business days prior to the pay date by 3:00pm. Supervisors must review timesheets and approve them by 10:00am the following day.
- **Monthly** – employee timesheet submissions are due 5 business days prior to the pay date by 3:00pm. Supervisors must review timesheets and approve them by 9:00am the following day.
- **Students** – student timesheet submissions are due 6 business days prior to the pay date by 12:00pm. Supervisors must review timesheets and approve them by 9:00am 4 business days prior to the check date.

For specific due dates and times, review the pay scheduled located on the University of Portland payroll website: https://www.up.edu/payroll/pay-schedules.html

What if the proxy I want to assign isn't available in the drop-down list?

If your desired proxy isn't available is the drop-down menu for setup, this means that they are not set up as a timesheet approver. Send an email request to payroll@up.edu asking for the approver to be added. A proxy cannot be a student employee.

Once an employee has submitted their timesheet, can they make corrections?

Yes, if the finalization time by the supervisor has not passed and the supervisor has not approved the timesheet. Simply choose **Return for Correction** and ask the employee to make necessary updates. As a supervisor, you can also make updates to the timesheet prior to approval by clicking on **Detail** and making the necessary updates. Once approved, timesheets must be manually updated by the payroll department. Corrections should be submitted in one of the following ways:

- **Changes to Hours Submitted** – for changes to types of hours entered or missing lunches, an email should be sent to the payroll department detailing error and how it should be adjusted as soon as possible.
- **Missing Hours Submitted** – for missing days from a timesheet, employees must complete the **Missed Payment Form** located on the University of Portland payroll website: https://www.up.edu/payroll/forms.html. Employee and supervisor signatures are required on this form before submitting to payroll via email.

How will my employee’s get paid if I am out and unable to approve time for a pay period?

It is important that you set up a proxy for timesheet approvals if you are out of the office and unable to approve time for your employees. You are responsible for identifying 1-2 proxies and letting your employees know who they are.

Can I view previous time periods that I have approved?

Yes, available time periods for your review will be available in the drop-down menu located on the **Approve Time** screen.

What happens if I didn’t notice that an employee’s time is wrong?

Once an error is noticed you will need to send an email to the payroll department (payroll@up.edu) with details of the error. A team member will respond to you with information on how the correction will be processed.

What if my employee doesn’t get paid?

There are several reasons that an employee would not receive an expected paycheck. Check with your employee to see if any of these situations have occurred:

- No supervisor approval at the deadline
- Employee entered hours but did not submit their timesheet
- Employee did not enter hours into self-serve Banner
- Employee can’t see their position in self-serve Banner
- Employee entered hours into the wrong position
- Employee submitted their timesheet before entering all hours worked

Once the root problem has been identified, refer to previous FAQ’s on how to submit information to the payroll department.

What happens if self-serve goes down?

With a web-based system, this possibility exists. If down time occurs that will affect the established timelines a communication will be sent out to address next steps.

What if I have trouble logging into the pilots website?

Reach out to the help desk at extension 7000 for assistance.