Banner Employee Self-Service User Guide

Developed by the Banner Support Team
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Employee Self-Service Overview & Access

Banner Self-Service is a web-based application used for administrative tasks at W&M. Employee Self-Service is opened through the W&M “portal” called myWM (open myWM from the W&M Home page).

Students use Self-Service to register for classes and check grades, faculty use it to manage classes, and staff use it for tasks such as completing time sheets and checking leave balances.

Web Time Entry or Department Time Entry

Most Departments use “Web Time Entry” meaning employees are expected to maintain their time sheets in Self-Service. A few Departments use “Department Time Entry” meaning employees submit paper time sheets and a staff member enters time in Self-Service.

If you don’t know whether you are required to submit a time sheet online or on paper, ask your supervisor.

With Web Time Entry all employees are expected to complete and submit time sheets and/or enter and submit leave taken.

To open Employee Self-Service:
- Log in to the myWM portal (from W&M home page).
- Click the Banner icon in the upper right corner of the screen.
- Select Employee from the services menu.

Note: Internet Explorer is the preferred browser for use with Banner Self-Service.
Employee Services

Open the services by clicking the links in the main menu or at the bottom of the screen.

Employee Self-Service offers the following services:

- **Timesheet** - Complete and submit time sheet.
- **Benefits & Deductions** - View benefits and deductions (call HR with questions or changes).
- **Pay Information** - View direct deposit breakdown, pay stub and earnings and deductions history.
- **Tax Forms** - View W-1, W-2 or T4 forms (call HR with questions or changes).
- **Time Off Current Balances and History** - View leave available and taken.
- **View Employee Leave Balances** - View leave balances for yourself and employees who report to you.

Click Employee to open the main ESS Services Menu.

Return to the Self-Service Tab by clicking “back to myWM Tab” in the upper left of the screen.

Note: Links to these services appear at the bottom of each screen. Click to navigate to these services without returning to the main menu.
Time Sheet

With only few exceptions, all employees must complete and submit time sheets - even if they are only required to enter time taken off (leave). When time sheets are submitted they are automatically routed to an “Approver” who either approves the time sheet or returns it for correction.

Note to Approvers: If you return a time sheet for correction you must notify the employee by phone or email. Employees are NOT automatically notified of a returned time sheet so resubmission could be delayed.

Time Sheet Submission Requirements

- **Hourly & Non-exempt Classified Employees**
  Must report time daily and submit a time sheet for every pay period worked.

- **Exempt Employees** - Must record exception time only (i.e., vacation or sick time). If no leave is taken, you do NOT need to submit a time sheet.

- **Administrative/Professional Faculty** - must record exception time only (i.e., vacation or sick time). If no leave is taken, you do NOT need to submit a time sheet.

- **Instructional faculty enrolled in the Virginia Sickness and Disability Plan (VSDP)** - must record exception time only. If NO sick leave is taken, you do NOT need to submit a time sheet.

**Employees . . .**

- Must enter and/or submit time or leave taken (see Submission Requirements) by Submit Date.
- If hourly, should enter time daily.
- Must complete a manual time sheet if Submission Deadline is missed.

**Supervisor/Approvers**

- Must approve and submit employee time sheet by deadline.
- Are responsible for designating and setting up a Proxy to approve time sheets in your absence.
- Should monitor time sheet status during pay period to assure all time sheets are being submitted.
- Must verify total hours on non-exempt time sheets for proper addition and subtraction.
- Must contact employees if time sheets are not started or need to be corrected.
Entering Time

Open a Time Sheet in the current pay period:

- After clicking Time Sheet, a **Position Selection** screen opens. Select position and pay period and click the Time Sheet button on the bottom left. *(Note to Approvers: an additional screen opens before the Position Selection screen that allows you to select to view your time sheet or time sheets to be approved.)*

**Position:** Only enter hours for one position at a time. If you hold more than one position, you may be required to submit a time sheet for each position in each pay period. Check with your supervisor.

**Pay Period and Status drop down list:** Only current and prior pay periods appear as choices. **Status:** Not Started (time sheet hasn’t been opened), In Progress (time sheet has been started but not submitted), Pending (view only - time sheet has been submitted, but not approved), Returned for Correction (time sheet has been returned for correction - can only be returned once, then time sheet must be restarted), Approved (time sheet has gone to Payroll and cannot be changed online).

- Categories of time earned or leave are on the left. **Enter Hours** blocks are under each date.
- Click the appropriate **Enter Hours** block across from the Category of time taken or earned to enter hours.
- Click in the Hours block (right of screen) and enter the number of hours earned or taken and click the **Save** button. You MUST click **Save** to have the hours entered on your time sheet.

**Select a position and pay period and click the Time Sheet button.**

**Enter hours worked or leave taken by clicking the Enter Hours links.**

**Enter hours in the box and click Save to save your hours. You must save each entry for it to appear on your time sheet. Scroll down to view the time sheet and continue entering hours.**
Submitting Time Sheet

You must submit your time sheet for approval.

- **Total Hours**: If your regular hours appear on your time sheet (called “default hours”) you must adjust those default hours to reflect leave taken. Regular hours are NOT automatically adjusted during the payroll process. Your paycheck will be calculated correctly for regular time, overtime, and leave.

- **Comments**: Click to add comments to explain your entries (I took sick leave . . .).

- **Preview**: Review all the entries on the time sheet.

- **Submit for Approval**: Click to send time sheet to Approver. Once submitted, your approver’s name should appear next to **Waiting for Approval From** at the bottom of the screen.

- **Restart**: If a time sheet has been returned for correction once and still has errors you must Restart your time sheet and enter your hours again. You may also be asked to Restart if other errors cannot be cleared.

- **Next**: To view the second week of a pay period, click Next.

**Note**: The status of your time sheet will appear in the bottom left of the screen.
Copy Hours

Hours in the same category can be copied to several days so each day doesn’t have to be entered.

- From the Enter Hours Screen click the Copy button.
- A screen opens listing all the days in the pay period. Select the days that should show the hours to be copied. The number of hours to be copied must be entered in the box before copying. Click the Copy button at the bottom of the screen. Always check your totals to be sure hours were copied correctly.
Update Emergency Contact Information with Banner Self-Service

What would happen if you or a co-worker had an emergency at work? Would campus administration know who to call? Could administration reach you in a campus-wide emergency?

Two types of Emergency Information

- **Emergency Notification System**: A method of contacting you in a campus emergency.
- **Emergency Contacts**: A person to contact - a relative, spouse, neighbor or friend - if you have an emergency at work.

Update contact numbers for Emergency Notification

- Click **Personal Information**.
- Click **Update Campus-wide Emergency Phone Numbers**.

Update Emergency Contact Information

- Click **Update Emergency Contacts**.
- Click **New Contact**. Complete the **Update Emergency Contacts** form and click **Submit**.
- To edit a contact, click the contact name.

**Note**: the View Emergency Contacts link is available at the bottom of each Update screen. Also View Emergency Contacts by clicking the link on the main menu.

Who sees Emergency Contact Information?

Only HR and W&M Police have access to this information and only use it in emergencies.

How should I list Contacts?

List contacts in order of priority (note the screen pictured here: the second field titled “Order”). For example, the contact listed as “1” will be contacted first.
Banner Employee Self-Service

It’s Easy to Update Address & Phone Numbers with Banner Self-Service

What happens if you move, have a zip code change or get a new phone number? Would HR be able to contact you? Updating Address and Phone Information is easy in ESS. Here’s how:

- Select Personal Information from the main Self-Service Menu. (This screen also takes you to Employee services).
- Select Update Address(es) and Phone(s) from the menu of Personal Information services.
- Click the Update link, complete the form and click Submit.

Note: a View Address(es) and Phone(s) link is available at the bottom of each Update screen. Also View Address(es) and Phone(s) by clicking the link on the main menu.
Viewing Leave Balances

Where can you go to see your leave balances? Is there a way for supervisors to view their employee’s leave balances?

To view your leave balances - what you have taken and remaining balance:
- Select Time Off Current Balances and History from the main Employee Self-Service Menu.

To view available leave balances for your employee’s:
- Select View Employee Leave Balances from the Employee menu.
- A list of your employees will display.
For questions about employment, benefits, or human resources:
- Contact Human Resources at 757-221-3169 or visit the HR website at www.wm.edu/hr.

For questions about Payroll:
- Contact the Payroll Office at 757-221-2848 or visit the Payroll website at www.wm.edu/financialoperations.

For questions about Banner Employee Self-Service:
- Contact Banner Support at 757-221-BANN (2266) or banner@wm.edu.