Banner Support

Banner B *Support*

Banner Employee Self-Service User Guide

The College of
WILLIAM & MARY

Developed by the Banner Support Team

Table of Contents

Click on any Title to go to the section.

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.

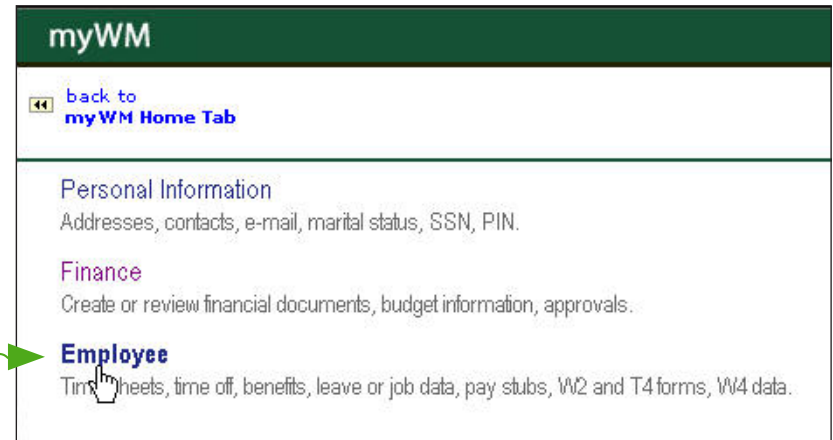*Note: Internet Explorer is the preferred browser for use with Banner Self-Service.*

Open Employee Self-Service (ESS) from myWM with W&M Userid and Password.
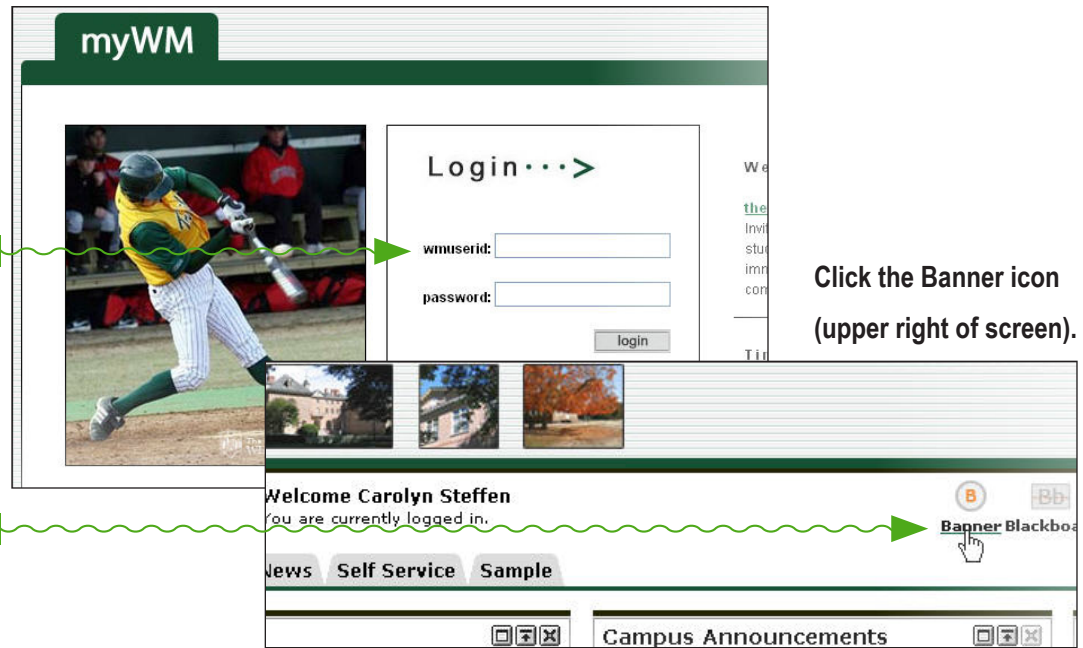
Click the Banner icon (upper right of screen).

Click Employee.

Note: the Personal Information link will be covered later. The Finance link only appears to users with access to Finance 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 break-down, pay stub and earnings and deductions history.

- **Tax Forms** - View W-r, 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.

Employee
Timesheets, time off, benefits, leave or job data, pay stubs, W2 and T4 forms, W4 data.

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

myWM

back to
Self Service Tab

Personal Information   Employee   Finance

Time Sheet
Benefits and Deductions
Update or view your retirement plans, Health insurance information, Flex spending accounts, miscellaneous deductions; Char
Pay Information
View your Direct Deposit breakdown; View your Earnings and Deductions History; View your Pay Stubs.
Tax Forms
Change W-4 information; View your W-2 Form or T4 Form.
Time Off Current Balances and History
View Employee Leave Balances
View the leave balances of your employees

[Time Sheet | Benefits and Deductions | Pay Information | Tax Forms | Time Off Current Balances a
RELEASE: 7.3.2

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.

Time Sheet
Benefits and Deductions
Update or view your retirement plans, Health insurance information open enrollment.

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.

Military Leave Taken 1	0	0	Enter Hours	Enter Hours	Enter Enter Hours
Total Hours:		0	0	0	0 0
Total Units:			0	0	0 0 0

| Position Selection | Comments | Preview | Submit for Approval | Restart | Next |

Submitted for Approval By:
Approved By:
Waiting for Approval From:

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.

To begin, click a link under the date where you wan

Time Sheet

Title and Number:
Department and Number:
Time Sheet Period:
Submit By Date:
Earning: Additional Hours Worke
Date: Mar 12, 2007
Shift: 1
Hours:

Save   Copy   Account Distribution

Earnings Code: Additional Hours Worked (Pay), Shift 1
Date and Hours to Copy: Mar 12, 2007, 0 Hours
Copy from date displayed to end of the pay period: ☐
Include Saturdays: ☐
Include Sundays: ☐
Copy by date:

Saturday Mar 10, 2007	Sunday Mar 11, 2007	Monday Mar 12, 2007	Tuesday Mar 13, 2007	Wednesday Mar 14, 2007	Thursday Mar 15, 2007	Friday Mar 16, 2007
☐	☐	☐	☐	☐	☐	☐
Saturday Mar 17, 2007	Sunday Mar 18, 2007	Monday Mar 19, 2007	Tuesday Mar 20, 2007	Wednesday Mar 21, 2007	Thursday Mar 22, 2007	Friday Mar 23, 2007
☐	☐	☐	☐	☐	☐	☐
Saturday Mar 24, 2007						
☐						

Time Sheet   Previous Menu   Copy

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.

myWM

◄◄ back to myWM Home Tab

Personal Information
Addresses, contacts, e-mail, marital status, SSN, PIN.

Personal Information | Employee | Finance

View Address(es) and Phone(s)
View E-mail Address(es)
Update E-mail Address(es) for eBILL Notification
Update Campus-wide Emergency Phone Numbers
NEW Click here to manage your phone contacts for the Co
Update Emergency Contacts

Personal Information | Employee | Finance

Emergency Notification System

The emergency notification system allows the College of Wi following:

- a campus-wide emergency
- a natural disaster
- a closing for inclement weather

These numbers will not be shared with anyone. If you have messages on one of your contacts by selecting your commu for the hearing impaired, you may indicate so with the TDD

YOUR CONTACTS

Type	Phone Number	SMS Provider
Home Phone	(804) XXX-XXX	-

[Click here to update your contacts]

Personal Information | Employee | Finance

Update Emergency Contacts - Select Contact

Your current emergency contact information is listed below. To update a contact, clic add a new contact, click New Contact.

Emergency Contacts

Order	Name	Address and Phone	Relationship
1	MJ Stevens	5555 Five Court Glen Allen, VA 23060 United States 555-5555555	Spouse
2	New Contact		

Personal Information | Employee | Finance

Update Emergency Contacts

Enter a new emergency contact below. When finished, click Submit Ch

Remove Contact: ☐
Order: 2
Relationship: Not Applicable
First Name:
Middle Initial:
Last Name:
Address Line 1:
Address Line 2:
Address Line 3:
City:
State or Province: Not Applicable
Zip or Postal Code:
Country: Not Applicable
Area Code: Phone Number: Extension:

Submit Changes   Reset

[View Emergency Contacts]

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 click-ing the link on the main menu.

myWM

◄◄ back to
myWM Home Tab

Personal Information
Addresses, contacts, e-mail, marital status,

Finance
Create or review financial documents, budg

Employee

Personal Information **Employee** **Finance**

View Address(es) and Phone(s)
Update Address(es) and Phone(s)
View E-Mail Address(es)
Update E-mail Address(es) for eBILL Notificatio
Upd
NE
View
Upda
Nam

Personal Information **Employee** **Finance**

Update Address(es) and Phone(s) - Select Address

To **update** an existing address, click the **link** next to the corresponding address.
To **insert** a new address, select the address type from the pull-down list at the bottom of
Note: Entering overlapping dates may change the effective dates on existing address reco

For change of address information and USPS forms, click here. Use your browser's Back butto

Addresses and Phones

Mailing	Phones
Update Sep 11, 2007 to (No end date)	Primary: 555-5555555
5555 Five Court	
Glen Allen, Virginia 23060-2437	

or you to add. Click on update link to update an a

Personal Information **Employee** **Finance**

Update Address(es) and Phone(s) - Update/Insert

When updating or inserting an address, **Address Line 1, City, State/Province, ZIP/Pos
required fields**; all other fields are optional. If you are entering a foreign address, Addre
required.

Mailing

Address Line 1:	
Address Line 2:	
Address Line 3:	
City:	Glen Allen
State or Province:	Virginia
ZIP or Postal Code:	23060-2437
Nation:	Not Applicable
Primary Phone Area Code:	804
Primary Phone Number:	
International Access Codes:	
Unlisted Telephone:	☐

Other Phone Types	Area Code	Phone Number	International Access Codes	Unlisted	Delete
Select				☐	☐
Select				☐	☐
Select				☐	☐
Select				☐	☐
Select				☐	☐

Submit

Select a Different Address to Update

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.

Personal Information **Employee** **Finance**

Time Sheet
Benefits and Deductions
Update or view your retirement plans, Health insurance info
Pay Information
View your Direct Deposit breakdown; View your Earnings and
Tax Forms
Change W-4 information; View your W-2 Form or
Time Off Current Balances and History
View Employee Leave Balances
View the leave balances of your employees

Personal Information **Employee** **Finance**

View Leave Balances

To view the pay period breakdown for a particular type of leave, click on the underlined t

NOTE: The balances below may not reflect recent leave activity.

List of Leave Types

TYPE of Leave	Hours or Days	Available Beginning Balance	Earned as of Jan 30, 2008
Annual Leave	Hours	23.50	4.00
Compensatory Leave	Hours	.00	.00
Community Service Leave	Hours	16.00	.00
Disability Leave Credits	Hours	.00	.00
Overtime Leave	Hours	.00	.00
Recognition Leave	Hours	.00	.00

Personal Information **Employee** **Finance**

Time Sheet
Benefits and Deductions
Update or view your retirement plans, Health insurance info
Pay Information
View your Direct Deposit breakdown; View your Ea
Tax Forms
Change W-4 information; View your W-2 Form or
Time Off Current Balances and History
View Employee Leave Balances
View the leave balances of your employees

Personal Information **Employee** **Finance**

View Employee Leave Balances

As of Friday , January 25, 2008		[Show Key]					
		ANNL	**COMP**	**CSLV**	**OTLV**	**RECG**	
930123456	Suzanne Wolfgang Manager	27.50	0.00	16.00	0.00	0.00	
930234567	Emeril Flay Consultant	76.00	0.00	16.00	0.00	0.00	1
930345678	Bobby Dean Consultant	166.00	0.00	16.00	0.00	0.00	
930456789	Paula Sumners Consultant	8.00	0.00	16.00	0.00	0.00	

Getting Help

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 757-221-3169 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.