Time Entry Procedures for Department Payroll Contacts

Departmental Time Entry for Full-time Professionals (FP)

CNM Department of Organizational Learning
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The Big Picture

Entrants: Full-time Professionals (salaried, non-faculty, exempt employees)
- Paper leave authorization
  - Individual will submit paper form (triplicate form) to supervisor for pre-approval of upcoming leave
- Supervisor approval
  - Supervisor approves leave and gives form to department payroll contact for entry, or rejects leave request and returns form to individual
- Departmental Time Entry
  - Department payroll contact or backup enters approved leave request hours directly into Banner INB form
- Exception entry
  - Only leave hours taken are entered into Banner
  - If no leave is taken, Full Time Professionals will be paid their regular salary for regular hours worked
Leave Authorization Form

Effective Pay Period 16, CNM has moved from the old Leave Slip to the newer Leave Authorization Form. The minor looking differences serve an important role in CNM’s Payroll Audit process.

Employee and supervisor signatures are both required before leave can be taken.

Your leave request form now authorizes CNM to deduct the leave from your balances without the redundancy of a signed timesheet.

Department must keep original, signed white copy for 11 years.
8 Steps to Time Entry

Salaried, exempt employees, also referred to by their pay code FP, will receive their regular bi-weekly paycheck by default. If an FP wishes to take time off from their regular work schedule, they must request that leave ahead of time from their supervisor in the form of a paper Leave Authorization form. The supervisor will either approve the request by signing the form or will return the form to the employee. The departmental payroll contact will only enter leave hours for an employee if the department payroll contact has a completed authorization form signed by the employee and supervisor.

Per CNM’s payroll calendar, the departmental payroll contact enters all approved FP leave and submits it to Payroll at the end of the pay period. Leave is entered and submitted as follows:
1) Log in to Banner
2) Open form PHATIME
3) Enter department and pay period information
4) Extract time records
5) Enter leave hours
6) Add comments, if appropriate
7) Submit to Payroll for approval
8) Log out

Log in to Banner

You must be at a CNM on-campus computer configured to connect to CNM’s Banner system.

Your computer desktop should display the Banner logon icon . Double-click on the icon to open the Banner window. If your computer does not display the Banner icon, contact the CNM Helpdesk at 224-HELP (224-4357).

Clicking on the Banner icon will first open an Internet Explorer window, and then a Java applet window. Do not close the Internet Explorer window; it will end your entire Banner session. If you wish, you may minimize the Internet Explorer window.

A logon window will appear in the center of the Java window. Enter your Banner username and password. Leave the Database field blank. Once you have entered your information, click on the Connect button.
**Open form PHATIME**

Starting at the Banner General Menu page, enter the form name PHATIME in the Go To field in the upper left corner and press Enter on the keyboard.

The PHATIME form is used by Departmental Payroll Contacts to enter hours. Let’s go over the basic components of a Banner form.
Enter departments and pay period information

Let's review the fields in the key block. Fields labeled in bold indicate fields to be used for departmental time entry.

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User ID</td>
<td>Will automatically populate with your User ID. No action needed</td>
</tr>
<tr>
<td>Proxy For</td>
<td>Leave blank, unless entering as a proxy for another payroll contact. See Proxies section for more information</td>
</tr>
<tr>
<td>Superuser</td>
<td>Not Applicable. No action needed</td>
</tr>
<tr>
<td>Entry by</td>
<td>Select Time Sheet from the drop down menu</td>
</tr>
<tr>
<td>Time Entry Method</td>
<td>Select Department from drop down menu</td>
</tr>
<tr>
<td>COA</td>
<td>Must have a 1, will default when screen is opened</td>
</tr>
<tr>
<td>Organization</td>
<td>Select the location code for which you wish to enter leave from the drop down menu. If you are entering leave for more than one location code, you will need to complete one location code at a time before rolling back up to this field and changing the value.</td>
</tr>
<tr>
<td>Transaction Status</td>
<td>Select Not Started from the drop down menu. Other options can be used to filter viewed transactions once records for a particular pay period have been extracted</td>
</tr>
<tr>
<td>Year</td>
<td>Select current year</td>
</tr>
<tr>
<td>Payroll ID</td>
<td>Enter BW (Bi-weekly)</td>
</tr>
<tr>
<td>Payroll Number</td>
<td>Select current pay period. CNM Banner does not allow access to previous or future pay periods</td>
</tr>
</tbody>
</table>

Once you have entered the correct values, click Next Block to move down. The Next Block command may be found in the menubar (Block/Next) or the tool bar, or you may Next Block by pressing [Ctrl-Pg down].

Note: if you press the Tab button instead of Next Block, you will see a Time Entry Selection Criteria pop up window. Click on the Cancel button to remove this pop up, then click Next Block to continue.
Extract time records

By clicking Next Block, you begin the time extract process. Banner will display the following pop-up:

![Extract Process Pop-Up]

Click Yes to proceed. You will get a pop-up stating the number of records processed with no errors, and the number of records with errors (if any). If you have errors, contact the Accounting Director Kimberly Rocheford at 224-4464. Otherwise, click Continue.

Records can only be extracted once per pay period. If you encountered errors when you extracted your department’s records, or if you previously extracted your department’s records for the current pay period, select All (Except not Started) in the Transaction Status field of the key block. This will allow you to see the extracted records.

Enter leave hours

Once you have extracted the records to process, you are ready to enter the leave hours taken by each employee. The Jobs block displays 1 employee’s record at a time. You can scroll through the employee records by either clicking on the scroll buttons on the right, or by using the up/down arrow keys on your keyboard.

When you have the employee whose time you wish to enter displayed, click Next Block. The cursor will move down to the Time Entry block.
Click the drop down arrow above the Earn field. You will see a box open up with your choices of available types of leave.

Double-click on the leave code you wish to enter. That code will automatically be populated in the Earn field of the Time Entry block.

Tab or mouse-click to the field under the date for which you wish to enter leave. Enter the amount of leave taken. Use half-hour increments.

If the employee has taken more than one type of leave, repeat the process of selecting an earn code and entering leave hours in subsequent record lines. See the illustration below for examples of Annual and Sick Leave.

If the employee has taken the same type of leave on more than one day, use the same line to record all hours. Ex – if an employee took annual leave on Monday, July 6 and Wednesday, July 8, list the hours on the same line. You do not need to select Annual Leave twice in the Earn fields.

The fact that a leave type is listed does not indicate that the employee has an available leave balance. To see an employee’s leave balance, click Options/List Leave Balances in the menubar. A pop-up window will display the employee’s leave balances.

If you accidentally select the same leave code on more than one line, you may remove that duplicate selection by placing the cursor on any field in the line to be removed, then selecting Record/Remove from the menubar.
Add comments

You may enter comments into the employee’s Banner record. These comments are viewable by anyone with access to that employee’s record, so be concise and professional with your entries. From the Time Entry block, Click on Options/View or Enter Comments in the menubar.

Enter comments in the field at the bottom of the form, then click Save.

Click on Options/Time Entry Data in the menubar to return to the previous window.
**Submit to Payroll**

After you have finished entering all the leave taken by the employee for the entire pay period, you must submit that employee’s record to Payroll. Click on Options/Submit Time for Approvals from the menubar. If your submission is complete, you will see a message in the lower right-hand corner of the window, stating “Time transaction successfully submitted.” If you receive an error message, contact Payroll for further assistance.

Remember, you must submit each employee’s time record individually. There is no function in banner to submit records for multiple employees or for entire departments.

**Log out**

Any transactions conducted in Banner from your desktop will be identifiable by your username. Don’t let anyone conduct any activity in Banner from your account. Close your Banner form, exit your Banner session, and close both the Banner javascript window and the Internet Explorer window.

**Making Changes**

**Making corrections before time has been submitted**

If department payroll contact has not submitted leave taken to payroll - leave slip may be modified and initialed by all parties, or a new leave slip is created to reflect correct leave amount.

**Changes after time has been submitted**

If department payroll contact has already submitted leave to payroll – an email notification must be sent by supervisor directly to the payroll office authorizing modification of leave.

If the type of leave requested is changed after leave entered into payroll system – supervisor must follow policy outlined in the Employee Handbook, *Once an employee is on approved leave, the leave may not be converted to any other type of leave without the written approval of a vice president and/or president*

*Section VIII: Leave Policies 8.01. Definitions, Section B – Chargeable Leaves.*

Attention: The Payroll Office will only accept an email notification directly from the responsible Supervisor. Emails from department administrative coordinators, administrative assistants, or individuals requesting the aforementioned leave change will not be processed.
Proxies

Banner only allows the individual who extracts time records to enter time for those employees, unless that individual has designated a proxy. The Banner Proxy function allows a Banner user to share his/her Banner rights with another user for a designated task. CNM departmental payroll contacts will use the Proxy function to grant rights to their payroll backups and to allow access to multiple individuals who need to access the same location codes.

Designating Proxies

All departmental payroll contacts and their backups must designate their proxies in the Banner system. Creating a proxy will enable the departmental payroll contacts, their backups, and other payroll contacts who manage the same location code to work interchangeably on a pay period.

Steps to designate a Banner proxy:

- Contact the people you wish to enter as your proxies. You will need to make note of their Banner ID for entry into the Proxy ID field later
- Navigate to the Banner form NTRPROX. This can be done by entering the form name in the Go To field on the Banner General Menu
  - If you are already on another form, you may navigate directly to NTRPROX by clicking on File/Direct Access in the menubar, typing the form name into the Go To field that appears, and pressing the Enter key.
- Confirm that your User ID displays in the User ID box. Next Block to the next data block.
- Select the Other Modules tab.
- Type in the Proxy ID. The Proxy ID is the Banner User ID for the designated proxy.
- Next Block to the Proxy Modules block
- Click the drop-down arrow and select Time.
Save your actions by clicking File/Save in the menubar or pressing F10

**Entering leave as a Proxy**

If you are entering leave as a backup to the primary payroll contact, or if you are entering leave for an individual whose record was extracted by another payroll contact, you will need to identify yourself as that payroll contact’s proxy. Confirm that the payroll contact has entered your Banner ID as a designated proxy for their location code (see instructions above). Once this has been done, perform the following:

- Navigate to the PHATIME form
- Type the Banner User ID of the person for whom you are acting as proxy into the Proxy For field and continue the leave entry as designated in training resource guide.

• In the example above, Banner User LORETTAM is entering the system as a proxy for department payroll contact KARAGON
Appendix: Types of Leave

The following definitions apply to FP employees. Refer to The Source for more information.

- **Sick Leave**: Full-time staff accrues four (4) hours of sick leave per pay period to a maximum of 2080 hours.
- **Annual Leave**: Full-Time professionals accrue annual leave as designated by accrual rates in the source.
- **Personal Leave**: Full-time professionals shall be granted 8 hours of personal leave per fiscal year.
- **Bereavement Leave**: A maximum of three (3) days leave with pay shall be granted an employee in the event of a death in the employee’s immediate family as defined in the Employee Handbook.
- **Court Leave**: An employee shall be granted leave with pay for service or appearance at a legal proceeding including jury duty or a response to a subpoena or other legal proceeding which requires the employee's absence from duty for other than personal matters.
- **Medical Leave (Long-Term)**: When an employee is unable to perform essential job functions because of a serious health condition, the employee shall be entitled to medical leave without pay under the Family and Medical Leave Act for a period not to exceed twelve (12) weeks during any twelve-month period.
- **Family Leave (Long-Term)**: An employee shall be eligible, under the Family and Medical Leave Act, to up to twelve (12) weeks of unpaid leave during any twelve- month period upon the birth and care of the employee's child, placement of an adopted or foster child with an employee or care of an employee's spouse, child or parent in case of a serious health condition.
- **Leave Without Pay**: (Also called Dock Pay in Banner) An employee may be granted an unpaid leave of absence outside the Family and Medical Leave Act when such leave is determined to be in the best interests of the College.
Appendix: The Source

CNM’s manual of policies and procedures is The Source, an online searchable reference. All questions regarding proper use and authorization of employee leave should be researched through The Source before being escalated up through Payroll. The Source can be accessed by CNM employees through the following link:
https://share.cnm.edu/SiteDirectory/ppo/Default.htm
Employees will need to log in using their CNM Username and password.

Appendix: Payroll Department Points of Contact

For further Payroll questions, you may contact the following people.

<table>
<thead>
<tr>
<th>Name</th>
<th>Title</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Melissa Lovato</td>
<td>Payroll Coordinator</td>
<td>4458</td>
</tr>
<tr>
<td>Jeff Naugle</td>
<td>Payroll Coordinator</td>
<td>4438</td>
</tr>
<tr>
<td>Melissa Nieto</td>
<td>Payroll Coordinator</td>
<td>4465</td>
</tr>
<tr>
<td>Christine Smith</td>
<td>Assistant Accounting Manager</td>
<td>4460</td>
</tr>
<tr>
<td>Kimberly Rocheford</td>
<td>Accounting Director</td>
<td>4464</td>
</tr>
</tbody>
</table>
### Readiness Checklist

<table>
<thead>
<tr>
<th>Ready?</th>
<th>Item</th>
<th>Answer or Plan</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>What are the names of supervisors you support who have FP employees?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>What are the location codes of the departments you support?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>How will you receive or retrieve your copies of Leave Authorization forms?</td>
<td></td>
</tr>
<tr>
<td></td>
<td>How and where will you save your departmental copies of submitted Leave Authorization Forms?</td>
<td></td>
</tr>
</tbody>
</table>