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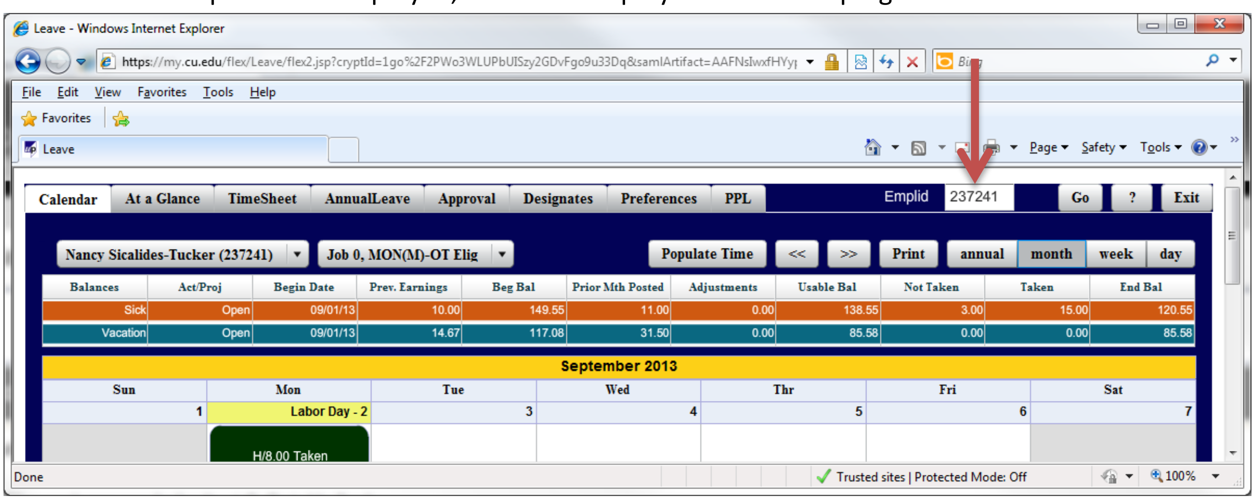
CU Portal - My.Leave Channel Step-by-Step Guide
Payroll Personnel Liaison (PPL) Guide

Overview: This guide provides instruction for PPL functions inside the My.Leave portal. This includes instructions for the look up features, PPL page, auto-generating exempt timesheets, and moving My.Leave data to time collection in HRMS.

***Users must be assigned the 'PPL' user role in HRMS to have full access to the functions outlined in this guide, including upload to HRMS Time Entry.** The functionality available to PPLs in My.Leave tabs include: Calendar, Timesheet, Approval, Preferences and Designates.*

1. View/Update Other Employees' Calendars
   - If you have PPL access in HRMS, you have access to look at entries, settings and other pages for other employees within your department(s).
   - To look up another employee, enter the Employee ID in the top right corner and select Go.



Note: Any entries or updates that you save on behalf of another employee will be reflected in an audit table.

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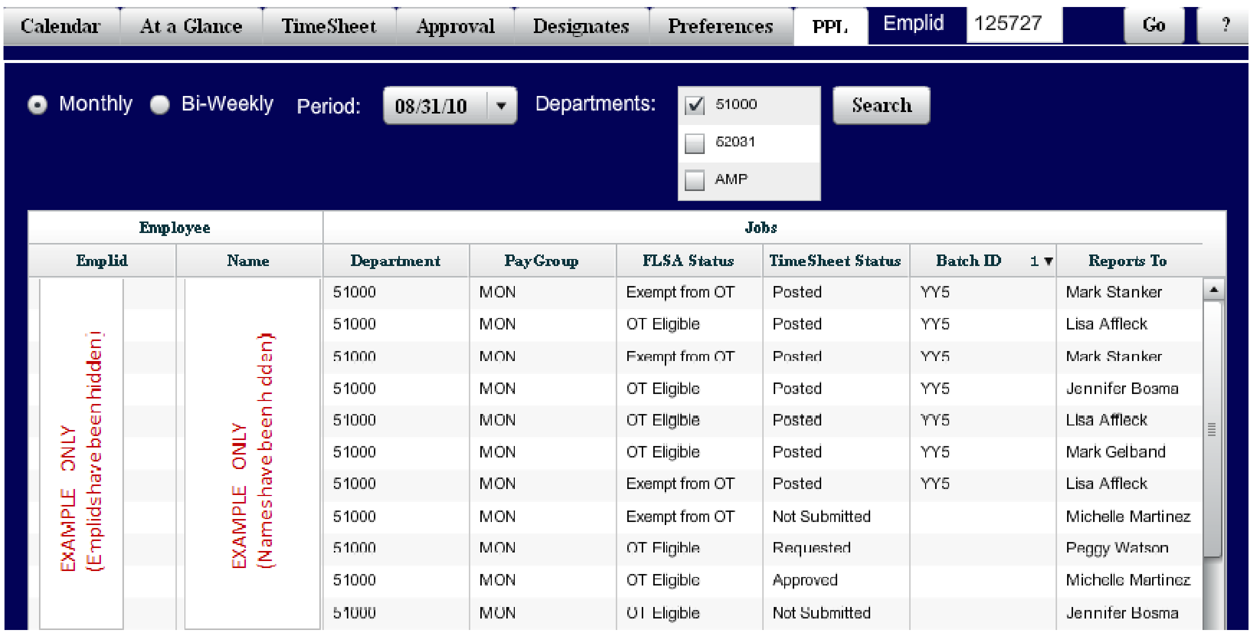
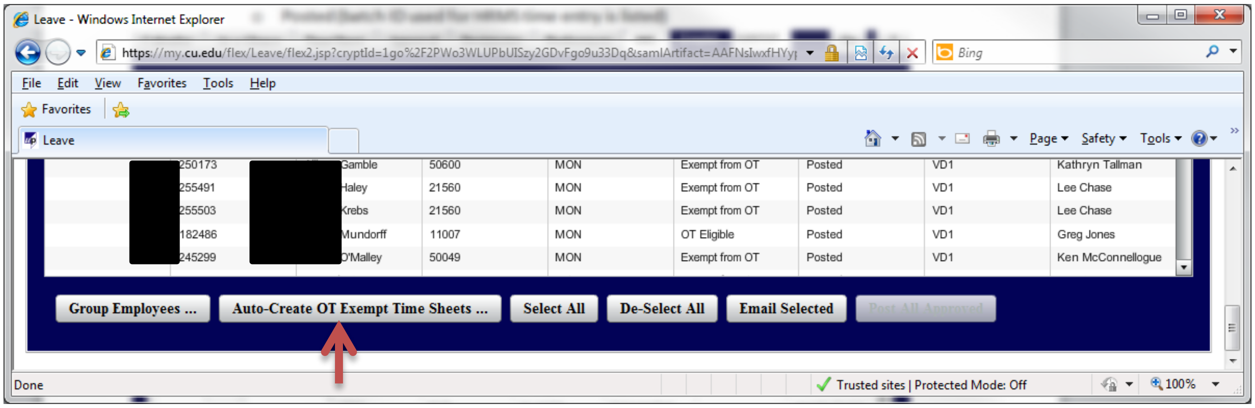
2. PPL Review Page
    - This tab is only available to users with PPL access in HRMS. The page shows all employees by pay period including: timesheet status and supervisor.
    - Click on any column head to sort by the data in that column.
    - PPL has the ability to view Monthly or Biweekly employees and to choose which department(s) to view (within the PPL's security access). This includes current and past pay periods for both Monthly and Bi-Weekly employees.
    - Timesheets have four possible status types in My.Leave:
        - Not submitted (employee has taken no action)
        - Requested (timesheet has been submitted for approval)
        - Approved (timesheet is ready to upload to HRMS batch)
        - Posted (batch ID used for HRMS time entry is listed)

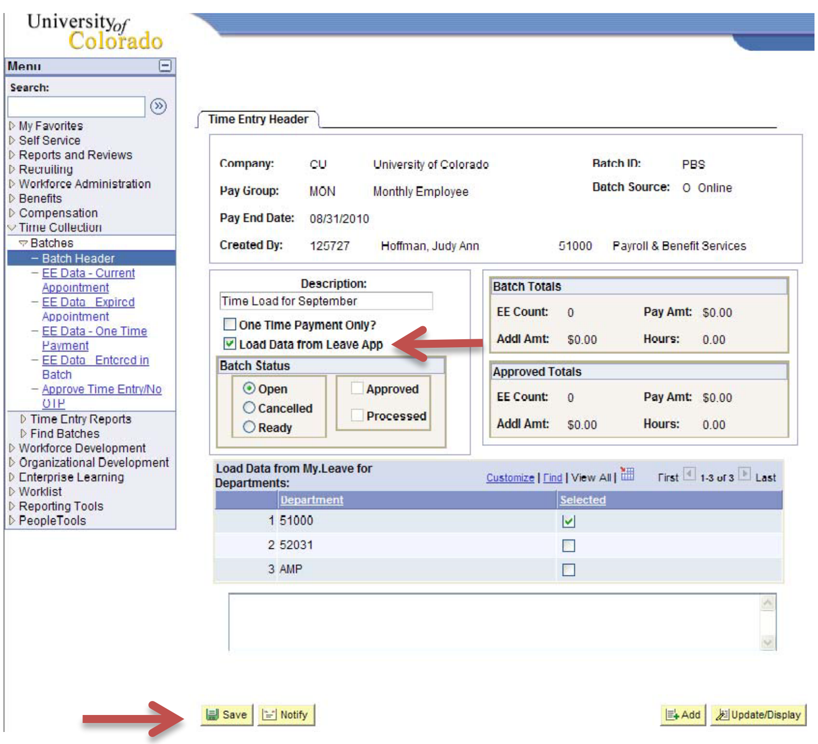


Employee		Jobs					
Emplid	Name	Department	Pay Group	FLSA Status	Time Sheet Status	Batch ID 1 ▼	Reports To
		51000	MON	Exempt from OT	Posted	YY5	Mark Stanker
		51000	MON	OT Eligible	Posted	YY5	Lisa Affleck
		51000	MON	Exempt from OT	Posted	YY5	Mark Stanker
		51000	MON	OT Eligible	Posted	YY5	Jennifer Bosma
		51000	MON	OT Eligible	Posted	YY5	Lisa Affleck
		51000	MON	OT Eligible	Posted	YY5	Mark Gelband
		51000	MON	Exempt from OT	Posted	YY5	Lisa Affleck
		51000	MON	Exempt from OT	Not Submitted		Michelle Martinez
		51000	MON	OT Eligible	Requested		Peggy Watson
		51000	MON	OT Eligible	Approved		Michelle Martinez
		51000	MON	OT Eligible	Not Submitted		Jennifer Bosma

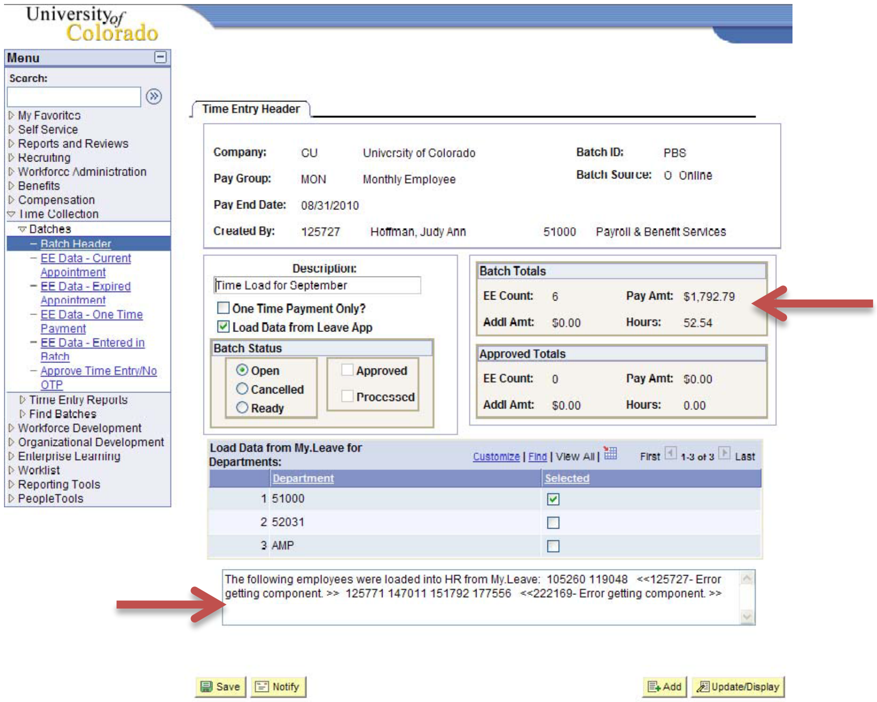
3. Auto-Create Exempt Timesheets
    - If your department does not require employees exempt from overtime to submit a monthly timesheet, you may auto-create them. (Timesheets are required to post leave usage in HRMS.)
    - Click on rows to select multiple employees (hold CNTRL button and select rows). Press **Auto-Create OT Exempt Time Sheets** in the bottom left corner. Timesheets will be created in "Approved" status and ready to load into HRMS.



4. Load Batch Data into HRMS Time Collection
    - Create a Time Collection Batch in HRMS. If you have access to multiple departments, select only those you wish to upload.
    - Click the checkbox Load Data form Leave App to automatically load all approved exception time from timesheets in My.Leave.
    - Save your batch header.



- Review counts from Batch Totals. The comment box shows which employee IDs loaded successfully.



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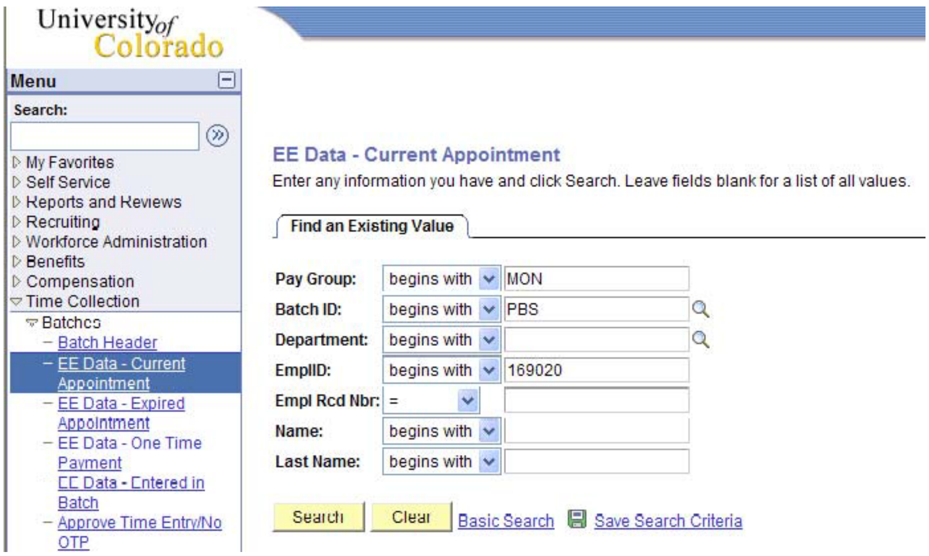
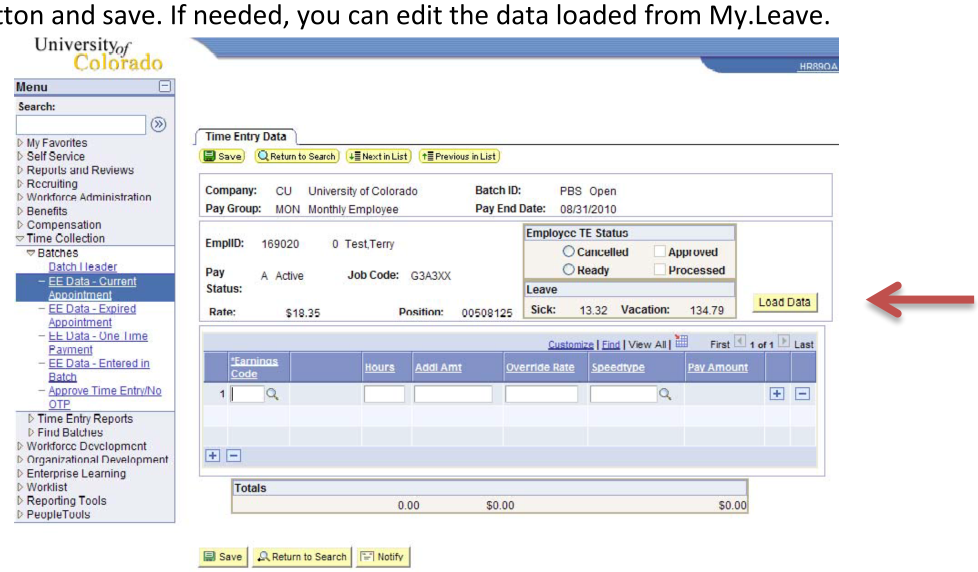
Additional Information

- Review the posted time entry approval deadlines documented on the Payroll Calendar.
- Wait to upload data to HRMS Time Collection until most of the timesheets for your department are approved.
- Load Data checkbox can be turned off/on and re-saved multiple times to upload more My.Leave data. Only new/ updated approved timesheets will upload.

5. Upload Time Entry Data by Employee
    - The PPL can also load and individual My.Leave timesheet.
    - Once a batch header has been created, go to HRMS Time Collection, EE Data Current Appt.
    - Search for the individual employee.



- If there is data available, the Load Data button will be YELLOW. If not, the button GRAY. Click the Load Data button and save. If needed, you can edit the data loaded from My.Leave.



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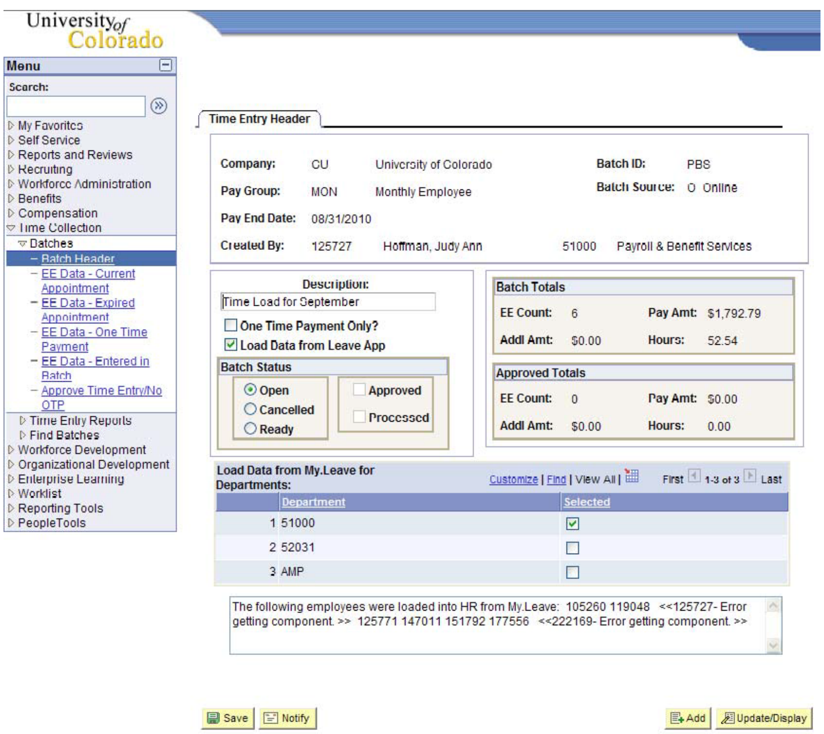
6. Correcting/Reloading Upload Data

- Once hours have been uploaded from My.Leave to the HRMS time entry batch, the My.Leave timesheet is locked.
- If a timesheet error is identified before the time entry deadline passes, the following steps are needed to open the timesheet back up, to allow corrections.
    - Either delete all rows of data loaded in Tine Collection for this employee or mark Employee TE Status as Cancelled. SAVE your changes.
    - Once the calendar entries are updated and the modified timesheet is submitted and approved in My.Leave, use the Load Data button to upload the timesheet information back into your HRMS batch. ***Note: if the PPL makes manual changes in the batch in HRMS, ensure you update the employee's calendar in My.Leave. This will ensure all documents match for auditing.**
    - Before approving the batch, make sure the TE Status is set to Ready.

7. Time Data Upload for Department PPL
    - Restrictions on the Time Entry pages will not allow an HRMS user to enter his/her own time.
    - HRMS users will not be able to load their own individual data from My.Leave.
    - When the My.Leave upload is completed, the department PPL will see his/ her emplid listed in the comment box as "Error getting component" (see image below).
    - A different HRMS user (with PPL access) will need to upload this time on behalf of the department PPL, using one of these methods:
        a) Batch Header: uncheck box to Load Data from Leave App, save, select box again and save again.
        b) EE DATA – Current Appointment: using a batch ID, pull up page for PPL, click Load Data button, save.



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8. Removing a Designate

Supervisors can add designates in My.Leave to assist in approving both leave requests and submitted timesheets. When an employee has a change in supervisor and the designate is not removed before the change has been completed in HRMS, the PPL will need to remove the designate in My.Leave.

- Log into My.Leave as yourself.
- Go to the PPL tab and make the appropriate selections (department, monthly). Right click on the employee's name that needs to have the designate removed and select View Designates.
- A new window will open, right click on the employee and select Clear Designates.

9. Clearing an Incorrect Start Date

When employees open My.Leave for the first time, they are required to enter the start date. There are times when the incorrect date is used which could cause issues in reporting correct time including giving a dock in hours. Business partners can correct this by doing the following:

- Go to your PPL tab in My.Leave.
- Right click on the employee that needs to be corrected.
- Select "Clear Start Date".

Once you do this, the employee will log into their My.Leave again and receive the window requesting the start date.