

Leave Approvals Self-Service

Training Manual



January 2024

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Leave Approvals

This process streamlines your leave approvals in Self-Service.

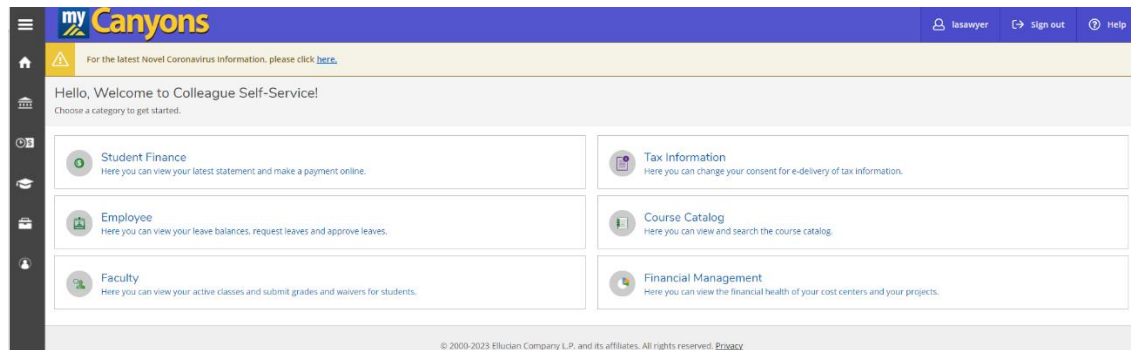
Please reach out to Payroll Services if you have any questions or issues.

- The following are instructions for the new Leave Approval process for Classified, Confidential, and Admin employees only.
- You will no longer use the Colleague MTDL screen to approve your staff employees' leave requests; you will access Self-Service to approve leave hours.
- The process for approving Faculty, Short Term, and College Asst. employees leave requests will still use the current process.
- All entries and approvals are in real time, which means you will see requests, approvals and rejections instantly.

Logging into Self-Service

There are multiple ways to login into Self-Service to use the Leave Requests and Reporting screen.

1. Self-Service is the web interface for Colleague. It can be accessed by opening a web browser (Either on or off campus) and going to <https://selfservice.canyons.edu/Student/Account/Login>.
 - a. Login with your COC Username and password.

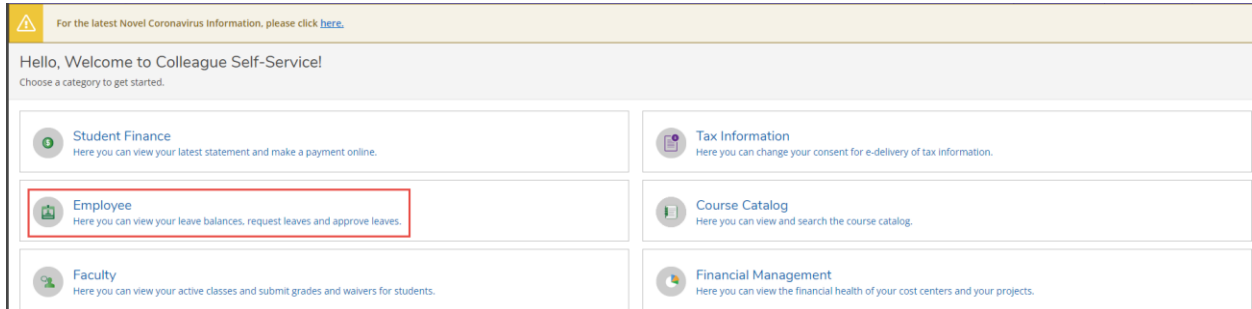


2. Log into myCanyons <https://my.canyons.edu/campusm/home#menu>
 - a. Select your profile (Staff, Student, Faculty, Guest).
 - b. Login with your COC Username and password.
 - c. Select one of two tiles to enter Self-Service.
 - i. Leaves & Contact Info tile, then select Leave Requests and Reporting menu.
 - ii. Self-Service tile.

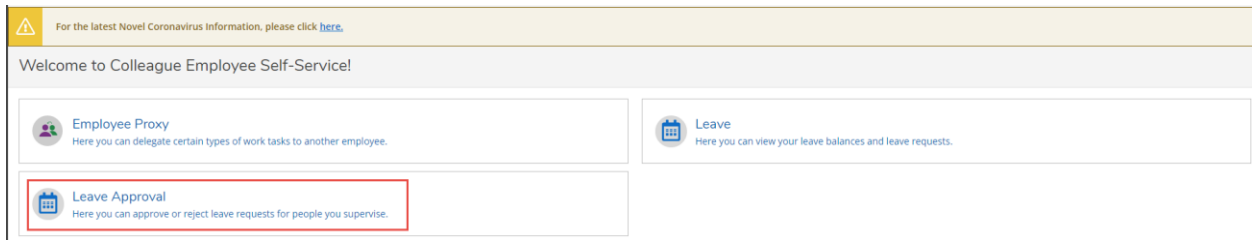


Navigating to Leave Approval Screen

1. Once you have logged into Self-Service, click on the Employee tile.



2. Click on the Leave Approval tile.



Set Leave Approval Filter Options

Leave Approval

[Filter](#) Filter is Active

Leave Approval Filter Options

- Leave Balance
- Leave Request
 - Submitted
 - Approved
 - Rejected
 - Withdrawal Pending

Include Employees with no Outstanding Leave Requests

[Reset Filters](#) [Apply Filters](#)

1. From the Leave Approval Filter Options, you can view:
 - Leave Balance – Displays current leave balances per Leave Type for each of your employees.
 - Leave Request – Displays the leave requests for your employees.
 - You can filter the leave requests by status (Submitted, Approved, Rejected and Withdrawal Pending).

Note: We are not currently using the Withdrawal Pending feature in Self-Service.
 - Include Employees with no Outstanding Leave Requests – allows you to view or hide employees in the list that have no leave requests.
2. Enter your filters and click on the Apply Filters button to reflect the filters on the screen.
3. Click on Reset Filters to clear your filter selections.

Approving Leave Requests

1. Set and apply the Filters to display Leave Requests in the Submitted status.
2. The screen will display all Leave Requests that are submitted for your approval.

You can approve, reject or comment from the Leave Approval screen or from the Leave Approvals details screen.

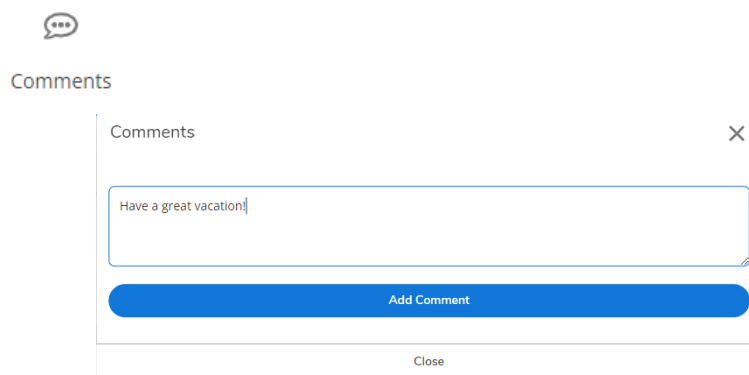
BEFORE taking action on the request, you should:

- Ensure the Leave Type matches the request. To view the employee's available leaves, you can use the Leave Balance filter.
- Review the Start Date, End Date, individual days, and hours per day requested in the leave request to ensure they fall within the employee's work schedule.
- Ensure the Total Hours Requested correctly match the request.
- Review the Current Leave Balance and Effective Balance of the employee before approving the request.

Leave Approval Screen

1. Click on Comments if you would like to see your employee's comments on this leave request or if you would like to enter comments for your employee.
 - a. Click on Add Comment after entering the comments.
 - b. Click on Close to close the Comments screen.

Note: Comments should be entered before approving or rejecting the leave request.



The screenshot shows a 'Comments' modal window. At the top left is a speech bubble icon with three dots. Below it is the title 'Comments'. The main area contains a text input field with the placeholder text 'Have a great vacation!'. Below the input field is a blue button labeled 'Add Comment'. At the bottom center is a 'Close' button. A close 'X' icon is located in the top right corner of the modal.

2. Click on Approve to approve the leave request.



3. Click on Reject to reject the leave request. You must enter a Reason for the rejection.

A dialog box titled "Reject Leave Request" with a close button (X) in the top right corner. It contains the following information:
Rejected By: Lisa A. Sawyer
Employee: Nathan Wagemann
Rejecting Request For: Vacation 12/13/2023
Reason: This is a critical time for year end.
At the bottom, there are two buttons: "Cancel" and "Reject".

4. Once you approve or reject the leave request, the employee will receive an email with the status of the request.
Note: You will no longer receive an email once you approve or reject your employee's leave request.

Leave Approval Details Screen




1. To view the details about a leave request, click onView






2. The employee's outstanding Leave Requests will be displayed on the left of the screen. If you click on the Date Range, you can view the details of the request.
3. The details of the leave selected will display on the main part of the screen.
4. On the top right, you will see the following fields:
 - Current Leave Balance: Employee's current leave balance for the selected Leave Plan.
 - Pending: Sums the hours the employee has submitted to the supervisor that have not yet been approved for the selected Leave Plan.
 - Effective Balance: Displays the projected balance should the pending leaves be approved.
 - Total Requested: Displays the hours the employee has requested for this specific leave request.

- Across the screen, you will see the detailed information about the selected Leave Request:
 - Leave Type.
 - Start Date and End Date.
 - Hours for each day that the employee has requested.

Vacation 12/13/2023 Submitted

 Approve
  Reject
  Comments

Leave Type

Start Date *  
 End Date * 

Current Leave Balance:	41.97 hours
Pending:	-8.00 hours
Effective Balance:	33.97 hours
Total Requested:	8.00 hours

	SU	MO	TU	WE	TH	FR	SA
	10	11	12	13	14	15	16
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="8.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- You can comment, approve or reject as per the previous section.

Unapproving Leave Requests

If an employee needs to cancel or modify a leave request that you have approved, the employee will request you to UNAPPROVE the request. The unapproved request will then be available for the employee to unsubmit where it will return to DRAFT status to be amended and submitted or deleted.

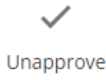
- Set and apply the Filters to display Leave Requests in the Approved status.
- The screen will display all Leave Requests that you have approved.
- Click on Comments if you would like to enter comments for your employee.
 - Click on Add Comment after entering the comments.
 - Click on Close to close the Comments screen.

Note: Comments should be entered before unapproving the leave request.



Comments

- Click on Unapprove to unapprove the leave request in the Leave Approval screen or the Leave Approvals Details screen. The status of the leave request will revert back to Submitted.

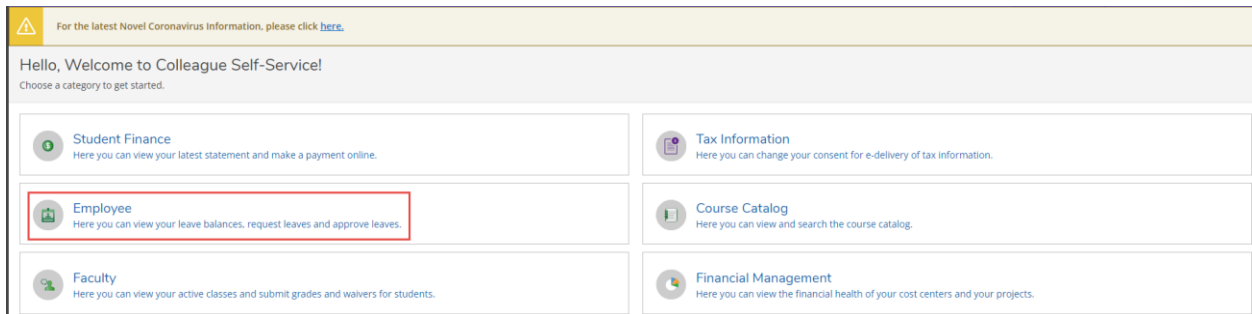


Leave Approval Proxy

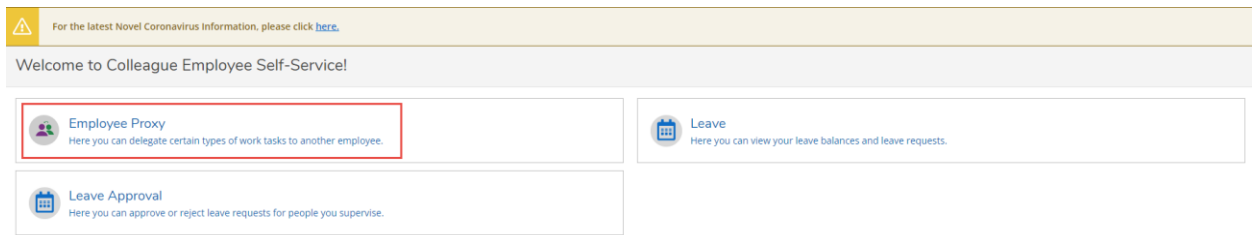
Setting up a Proxy in your Absence

Self-Service is designed to allow you, the supervisor, to designate a Proxy (alternate) that can approve leave requests in your absence.

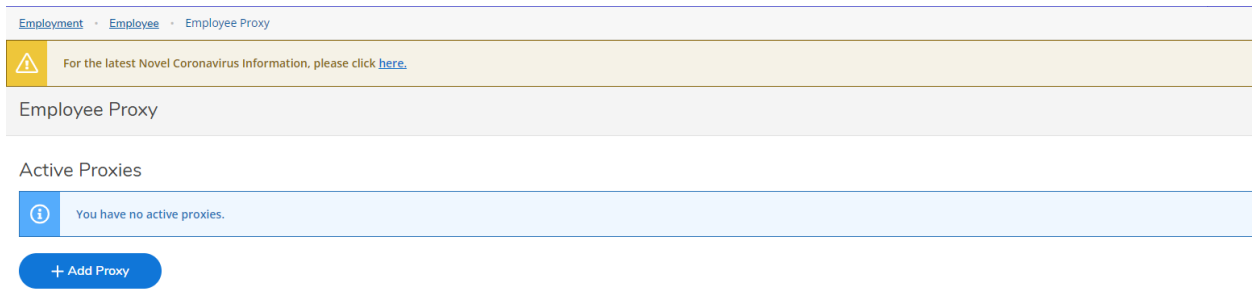
- Once you have logged into Self-Service, click on the Employee tile.



- Click on the Employee Proxy tile.



- Click + Add Proxy.



4. Once you are on the Add Employee Proxy screen, you can define your Proxy(s).
 - a. Select Proxy Type of Leave Approval.
 - b. Set the Effective Date and Revoke Date for the range of dates you will need your Proxy to act on your behalf.
 - i. You can leave the Revoke Date open if you want someone to act as your Proxy on an ongoing basis.
 - c. On the Search for Proxy field, enter the name of the person who will be serving as your Proxy. You can enter LastName, FirstName or the Colleague ID and click the Search icon.
 - i. Select the name of the person you want for your Proxy
 - ii. **Note:** This person must be an administrator and, in most cases, should be within your division.
 - d. Click Add Proxy

Add Employee Proxy

Select Proxy Type*

Leave Approval

Effective Date* 12/18/2023

Revoke Date 12/31/2023

Proxy access ends at 12:01 AM on this date.

Search for Proxy*

Search for Employee to Act as Proxy

Aileen D. Paras
0417831

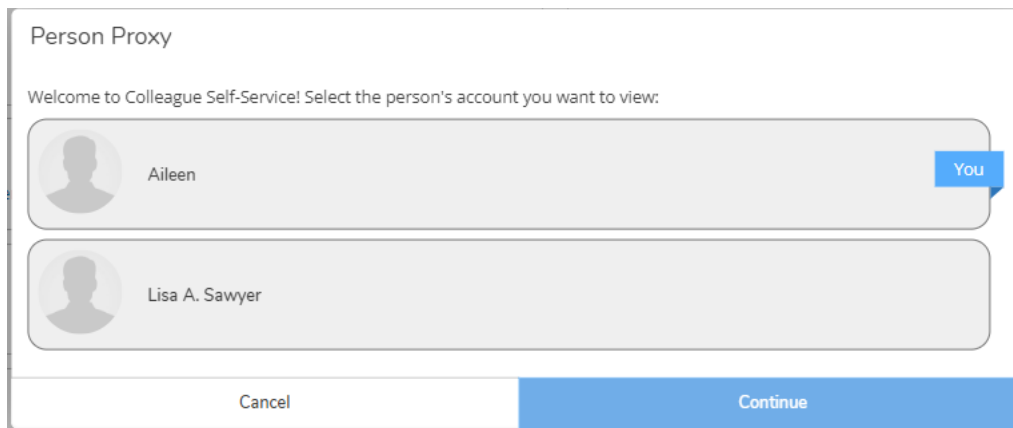
Cancel Add Proxy

Acting as a Proxy

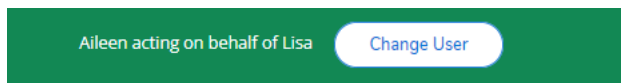
If you have been selected as a Proxy, you will receive a copy of the email notifications sent to the primary supervisor for the duration of their absence period. As the Proxy, you will follow the same approval process you complete for your own staff.

When you are a Proxy, the Person Proxy screen will appear when you logon to Self-Service.

1. Click on the person's name you want to be a Proxy for.
2. Click on Continue.



The screenshot shows a 'Person Proxy' selection interface. At the top, it says 'Person Proxy' and 'Welcome to Colleague Self-Service! Select the person's account you want to view:'. Below this, there are two user selection cards. The first card shows a profile icon and the name 'Aileen', with a blue 'You' tag on the right side. The second card shows a profile icon and the name 'Lisa A. Sawyer'. At the bottom of the screen, there are two buttons: 'Cancel' on the left and 'Continue' on the right.

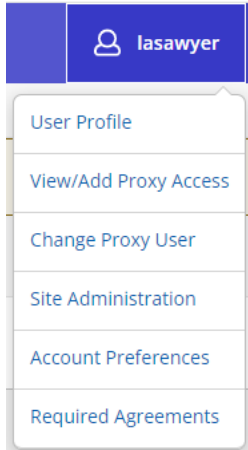


A green banner at the bottom of the screen displays the text 'Aileen acting on behalf of Lisa' on the left and a white button with the text 'Change User' on the right.

When you access Leave Approval in Self-Service, you should see all leave requests for the supervisor you are covering for. Then you can approve or reject that supervisor's employees' leave requests.

You can change your access to your own access or change to a Proxy by one of two ways:

1. Click on Change User in the green banner
2. Click on the user name in the top right and click Change Proxy User



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