Leave Balance Adjustments

Overview
The Leave Balance Adjustments screen allows agencies to adjust an employee's leave balance outside of the normal leave accrual and use processes. The employee must be in employee group 01 or 02 (included/excluded) and meet the eligibility requirements for the specific leave type. This screen is not valid for the State Courts System or Justice Administrative Commission. To see how leave balance adjustments affect the Leave Balance Overview screen and how balances are updated, refer to the *Time Evaluation Process* instructional guide.

Definitions
The following fields are included in the Leave Balance Adjustments Overview section:

- Leave Type – The following leave types can be adjusted. Click the checkbox to select a leave type.

    o Annual leave

    o Sick leave

    o Military training leave

    o Regular comp leave

    o Special comp leave

    o FLSA comp leave

    Note: The personal holiday cannot be adjusted.

- Remaining Leave – The net hours available that account for saved or submitted timesheet hours, pending payout hours, pending negative leave balance adjustments and pending transfer hours. This is the current leave balance available as of the system date.

- New – Select to create a leave balance adjustment.

The following fields are included in the Leave Balance Adjustments Details section:

- Adjustment Date – Required field; defaults to the current system date and can be changed to a date within and not prior to the current pay period or future date.

- Leave Type – Required field; defaults to the leave type selected in the overview section. When creating an adjustment and no selection was made in the overview section, you can choose a leave type from the pop-up window.

- Number of Adjustment Hours – Required field; defaults to zero. Enter the number of hours for the balance adjustment.

- o Only one pending adjustment is allowed per leave type; if you are processing a negative adjustment, the amount of adjustment may not exceed the overall balance for the leave type. If you process more than one adjustment per leave type, the last record entered will be processed.

- o Negative adjustments can be processed only with a date in the current pay period or future pay periods (cannot be dated prior to the current pay period).

- o If you create a future dated adjustment, it will remain viewable and editable until time evaluation runs on that future date.

- o Use a negative entry to decrease the leave balance, e.g., enter -10.00 to reduce the leave balance by 10 hours.

- o Adjustments can be processed using up to three decimal places.

- Comments – Required field; enter a statement to identify why the adjustment is being processed. You can enter up to 60 characters.

- Edit – Allows the user to edit the current information displayed on the screen for the specific leave type selected in the overview section.

- Cancel – Allows the user to cancel the action of creating a new adjustment for the specific leave type selected in the overview section.

- History – Allows the user to view all leave balance adjustments for the leave type selected in the overview section.

Authorization

Users with a security role code of A, H, U, X and Y will be able to process a leave balance adjustment. Users with a security role code of B, C, F, G, I, K, N, S and T will be able to view leave balance adjustments that have been processed.

Process Steps

Step 1: Select Management > My Direct Reports.

Step 2: Select the employee ID.

Step 3: Select Time & Payroll > Leave Balance Adjustments.

Step 4: Select the leave type record to transfer (annual, sick, military training leave, etc.). You must adjust each leave type separately.

Step 5: Select "New."

Step 6: Enter the date of adjustment.

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Step 7: Enter the leave type (or select from pop-up window).

Step 8: Enter the number of adjustment hours. Use a negative entry to decrease the leave balance.

Step 9: Enter comments (reason for the adjustment).

Step 10: Select "Save."

Leave Balance Adjustments->Overview

Leave Type	Remaining Leave
ANNUAL LEAVE	676.000
SICK LEAVE	1505.890
MILITARY TRAINING LEAVE	240.000

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Menu New

Remaining leave is the net hours available which accounts for the following: saved or submitted timesheet hours, pending payout hours, pending negative leave balance adjustments and pending transfer hours. This is the current available leave as of today.

Leave Balance Adjustments->Details

Adjustment Date	12/04/2015 📅*
Leave Type	🗐*
Number of Adjustment Hours	0.000 * (Use a negative entry to decrease the balance)
Comments	*

* Adjustments to balances will become effective on the day following the adjustment date.

Edit Save Cancel

After leave balance adjustments are completed, the user can view the history and details associated with prior adjustments made for the employee.

Leave Balance Adjustments->Details

12/04/2015 SICK LEAVE 80.000 hrs SL donation to employee 123456

04/27/2007 Adj Leave Type 52 Balance 176.00- hrs

03/20/2007 Adj Leave Type 52 Balance 243.00 hrs Corrected anniv. date and adjusted

02/05/2007 Adj Leave Type 52 Balance 579.25 hrs sick leave transferred from prior

Edit Save Cancel