

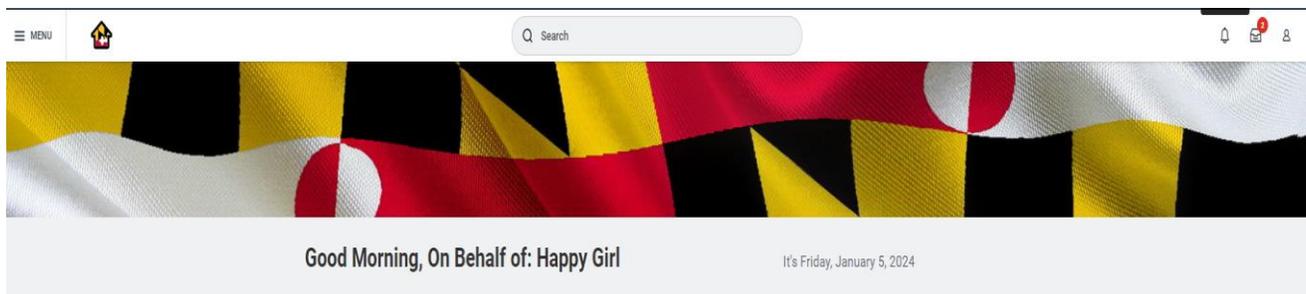
## View Carryover Balances

Use this procedure to view carryover balances for the next 12-month period. The information shown includes the selected leave plan, the Carryover Date, the Carryover Balance, Forfeited Hours, and the expiration date of leave balances specified (if applicable).

**Questions?** Please contact your agency Timekeeper or HR Office for questions regarding carryover balances.

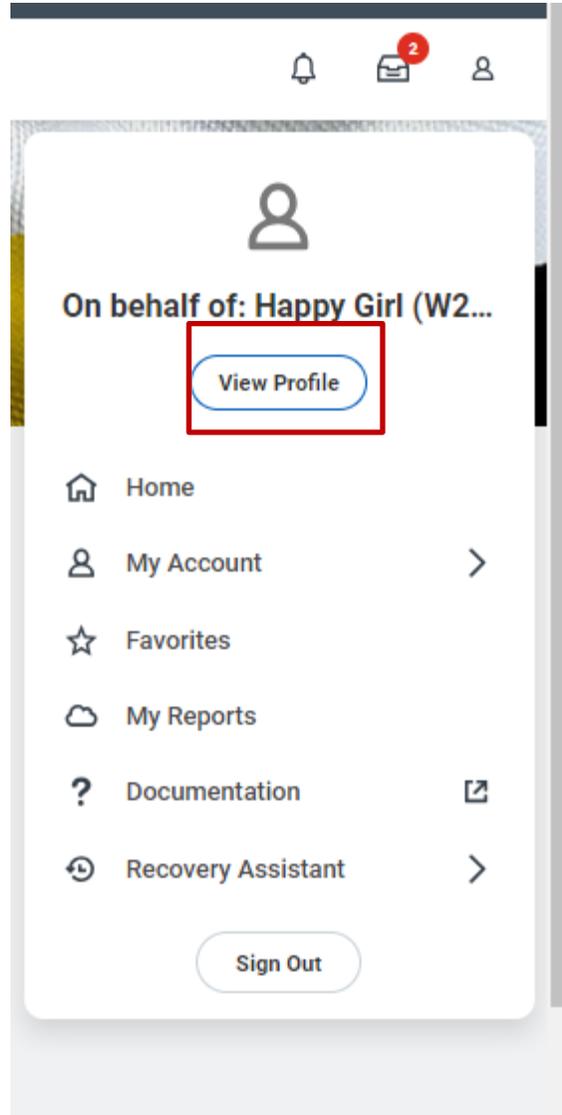
### Procedure:

#### Workday Header



1. In the top right corner, click the My Account  icon.

#### Workday Header – My Profile

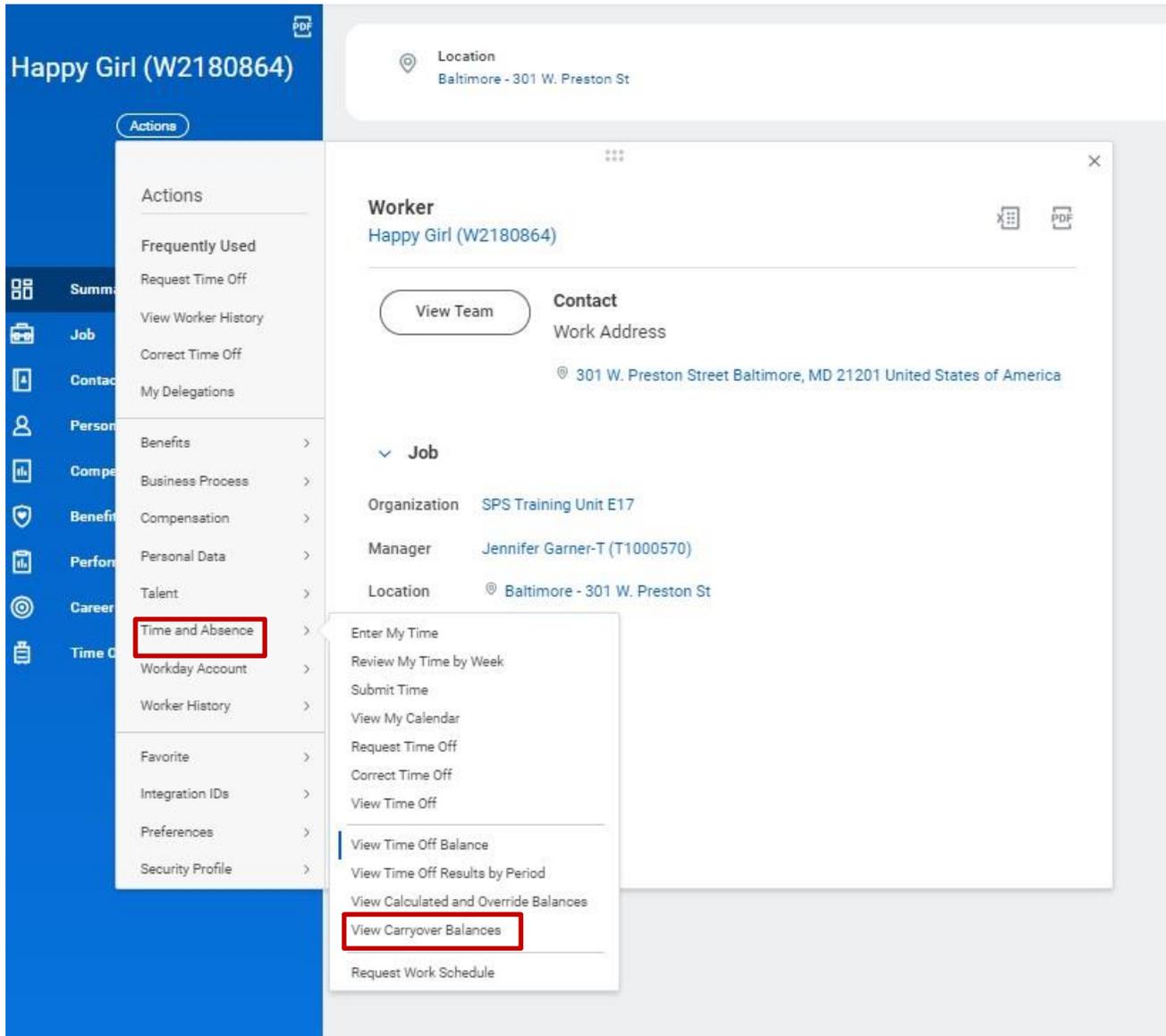


2. Click the **View Profile** button.



## Worker Profile

3. Click the **Related Actions** button below your name.



The screenshot shows the worker profile for 'Happy Girl (W2180864)'. The 'Actions' menu is open, and the 'Time and Absence' option is selected. A sub-menu is displayed, showing the 'View Carryover Balances' option highlighted with a red box. The worker's location is listed as 'Baltimore - 301 W. Preston St'. The worker's organization is 'SPS Training Unit E17', and the manager is 'Jennifer Garner-T (T1000570)'. The worker's location is also listed as 'Baltimore - 301 W. Preston St'.

4. In the menu, hover over Time and Leave, then click View Carryover Balances.

## Carryover Balances for Worker – Select Date Range and Time Off Plans



**Carryover Balances for Worker** Happy Girl (W2180864) ⋮

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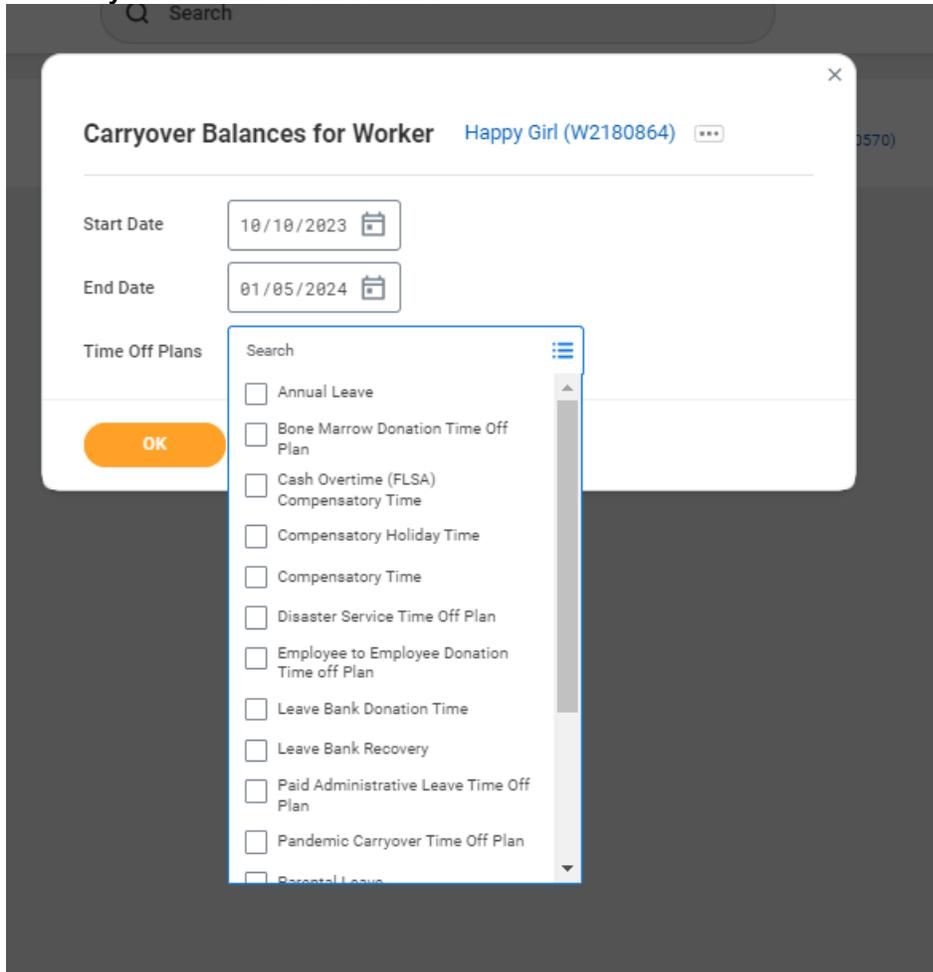
Start Date

End Date

Time Off Plans

5. On the **Carry Over Balances for Worker** page, enter or select values for the following fields:
  - **Start Date:** Enter the start date for the period in which you want to view.
  - **End Date:** Enter the end date for the period in which you want to view.
  - **Time Off Plans:** Select one or more leave plans that you want to view carryover balance information.

### Carryover Balances for Worker



6. Click the **OK**  button.



## Carryover Balances for Worker

Carryover Balances for Worker Happy Girl (W2180864)

Start Date 01/01/2023  
 End Date 01/02/2024  
 Time Off Plans Annual Leave  
 Personal Leave  
 Sick and Safe (Regular)  
 Sick Time

4 items

Plan	Unit of Time	Carryover Date	Carryover Balance	Forfeited
Annual Leave	Hours			
Personal Leave	Hours			
Sick and Safe (Regular)	Hours			
Sick Time	Hours	01/01/2024	20.66	0

7. Review the carryover balance information.

### Carryover Balances for Worker

#	Column	Desc
1	<b>Plan</b>	Leave types that were selected on the previous page.
2	<b>Unit of Time</b>	Unit of time for the leave type (e.g., hours).
3	<b>Carryover Date</b>	Date that the balance for the leave plan was carried over to the next 12-month period.
4	<b>Carryover Balance</b>	Leave balance that was carried over to the next 12-month period.
5	<b>Forfeited</b>	Total hours that have been lost and cannot be used during next 12-month period, e.g., loss of Annual Leave or Compensatory Leave.
6	<b>Expiration Date</b>	Date that balances expire in the time frame selected (e.g., 7/1/2014 – 6/30/2015) if applicable

8. The System Task is complete.