



Title: Adjust Leave Balances for an Employee
Role: Timekeeper
Functional Area: Time Tracking

Adjust Leave Balances for an Employee

Use this procedure to add or remove time off (leave) hours from an employee's balance. An adjustment is made to the employee's time off (leave) balance for the specified leave type.

NOTE: The time off balance adjustment takes effect in the pay period **AFTER** the pay period selected in the process below. In order for the employee to use leave in the current pay period that has been adjusted the period selected must be that of the previous pay period.

Examples of adjustments are listed below:

- **Adjustment On Behalf of Employee beyond Employee Correction Period:** An adjustment to a leave balance may be needed if time was reported incorrectly in a past pay period that is beyond the pay period that the employee can correct on their own timesheet.
- **Leave Bank:** If Leave Bank leave was granted and then the request denied, the employee would owe the leave hours back, or if the employee returned to work before using all of the Leave Bank hours granted.
- **FMLA:** If the employee used FMLA for an absence that was not qualifying.
- **Donating and Receiving Leave:** Donating to the leave bank or another employee OR receiving from the leave bank or another employee.
- **Termination Adjustments:** When an employee terminates employment and may need to "zero out" their earned leave plan(s).
- **Adjusting Erroneous Balances:** Adjusting erroneous balances at Go-Live, transfers from a non-SPMS agency or forfeiture of annual leave (disciplinary action).

Procedure:

1. Search for the employee.
2. Click the employee name hyperlink.

View Worker

Captain America (TTE10001) Executive

TTE10001 Executive

View Team

Baltimore - 301 W. Preston St

Elisha Archibold (W0999904)(C) Manager

Job Contact Personal Pay Performance Career Time Off

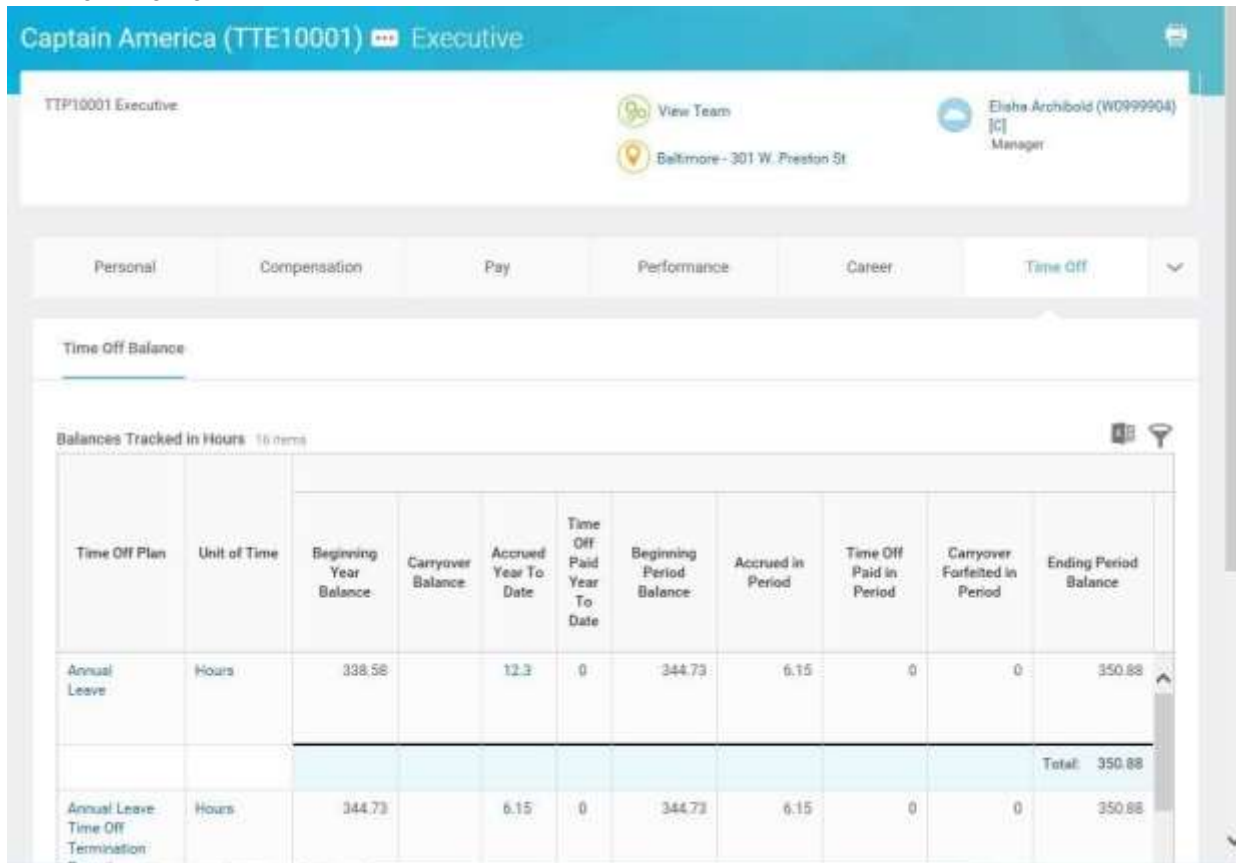
Professional Profile Job Details All Jobs Job History Manager History Management Chain More

Experience

Education

- On the employee's worker profile, click the Time Off tab to view the current leave balances for the employee.

View Worker



Time Off Balance

Balances Tracked in Hours: 16 items

Time Off Plan	Unit of Time	Beginning Year Balance	Carryover Balance	Accrued Year To Date	Time Off Paid Year To Date	Beginning Period Balance	Accrued in Period	Time Off Paid in Period	Carryover Forfeited in Period	Ending Period Balance
Annual Leave	Hours	338.58		12.3	0	344.73	6.15	0	0	350.88
										Total: 350.88
Annual Leave - Time Off Termination	Hours	344.73		6.15	0	344.73	6.15	0	0	350.88

- View the Time Off balances.

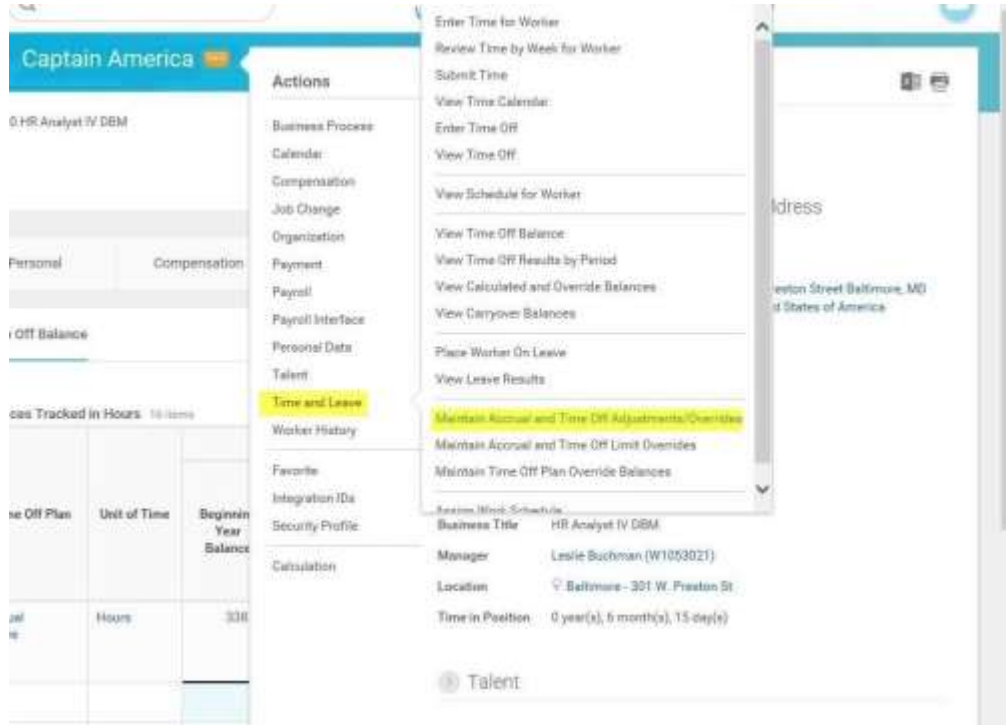


Information: Note the **Time Off Paid Year To Date** balance. This balance will be updated after making an adjustment when the pay period is in the current year.

The **Ending Period Balance** will also be updated after the adjustment. The adjustment you are making will reflect in the beginning balance of the period following the one you selected when making the adjustment.

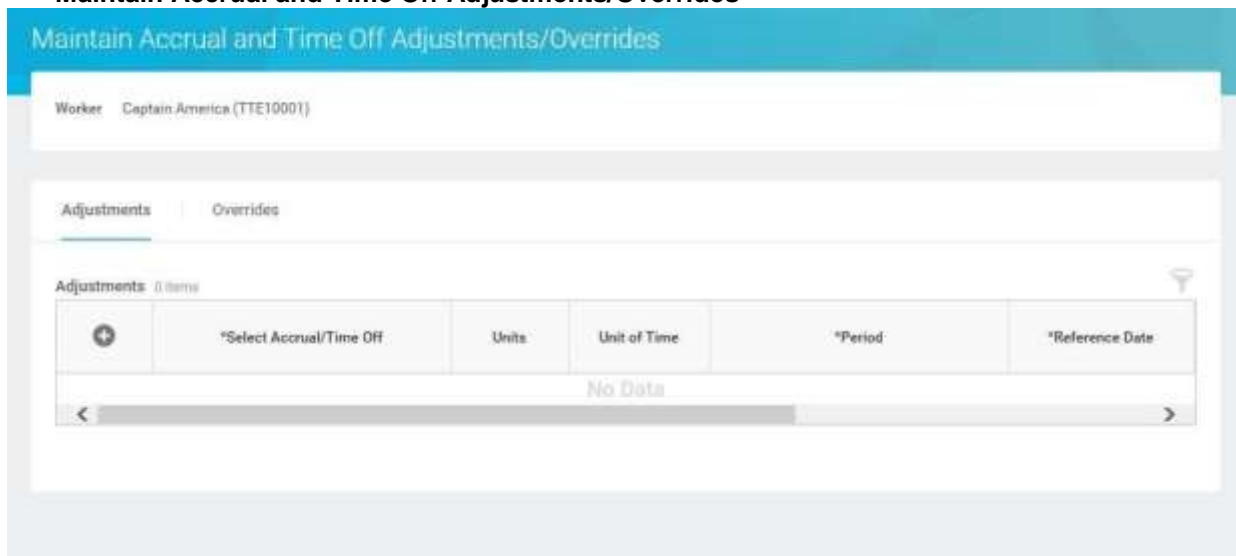
- Click the Related Actions and Preview  icon next to the employee's name.


View Worker





6. In the menu, hover over Time and Leave and then click the Maintain Accrual and Time Off Adjustments/Overrides hyperlink.

Maintain Accrual and Time Off Adjustments/Overrides



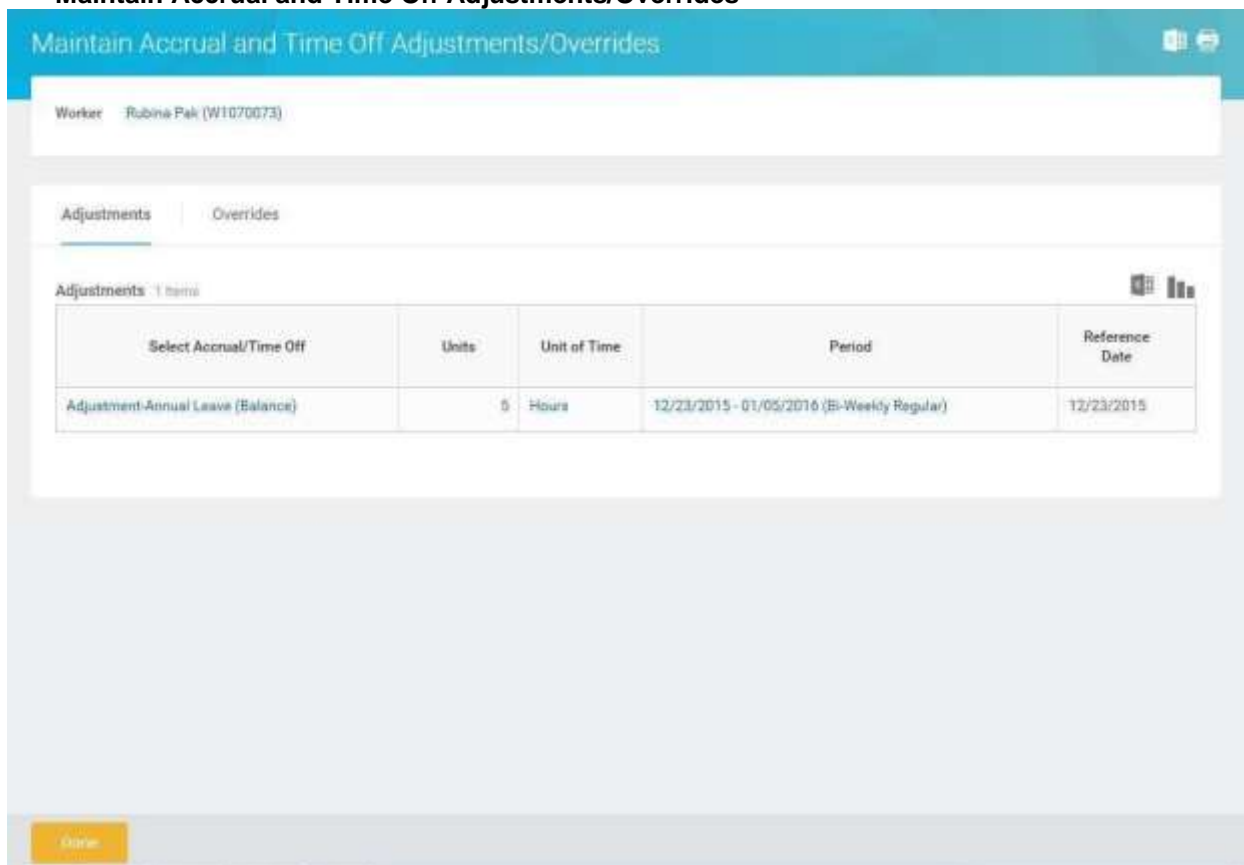
7. On the Adjustments tab, click the Add Row  icon to add a row for an adjustment.

8. Then, complete the following fields:

- **Select Accrual/Time Off:** Use the prompt  to select the **Accrual/Time Off**.
- **Units:** Enter the amount you are adjusting in the **Units** field.
 - **To add to the time off balance** (e.g., Leave donated to employee): Enter the unit as a negative number e.g. “ -5 ” to add 5 hours to the balance
 - **To subtract from the balance** (e.g., for leave bank donation) enter the unit as a positive number e.g. “5” to subtract 5 hours from the balance.
- **Period:** Use the prompt  to select the period for the adjustment. **NOTE:** Select the period prior to the period which the adjustment is to reflect in the time off balance.

9. Click the **OK**  button.

Maintain Accrual and Time Off Adjustments/Overrides



Worker: Rubine Pak (W1070073)

Adjustments | Overrides

Adjustments: 1 item

Select Accrual/Time Off	Units	Unit of Time	Period	Reference Date
Adjustment-Annual Leave (Balance)	5	Hours	12/23/2015 - 01/05/2016 (Bi-Weekly Regular)	12/23/2015

Done

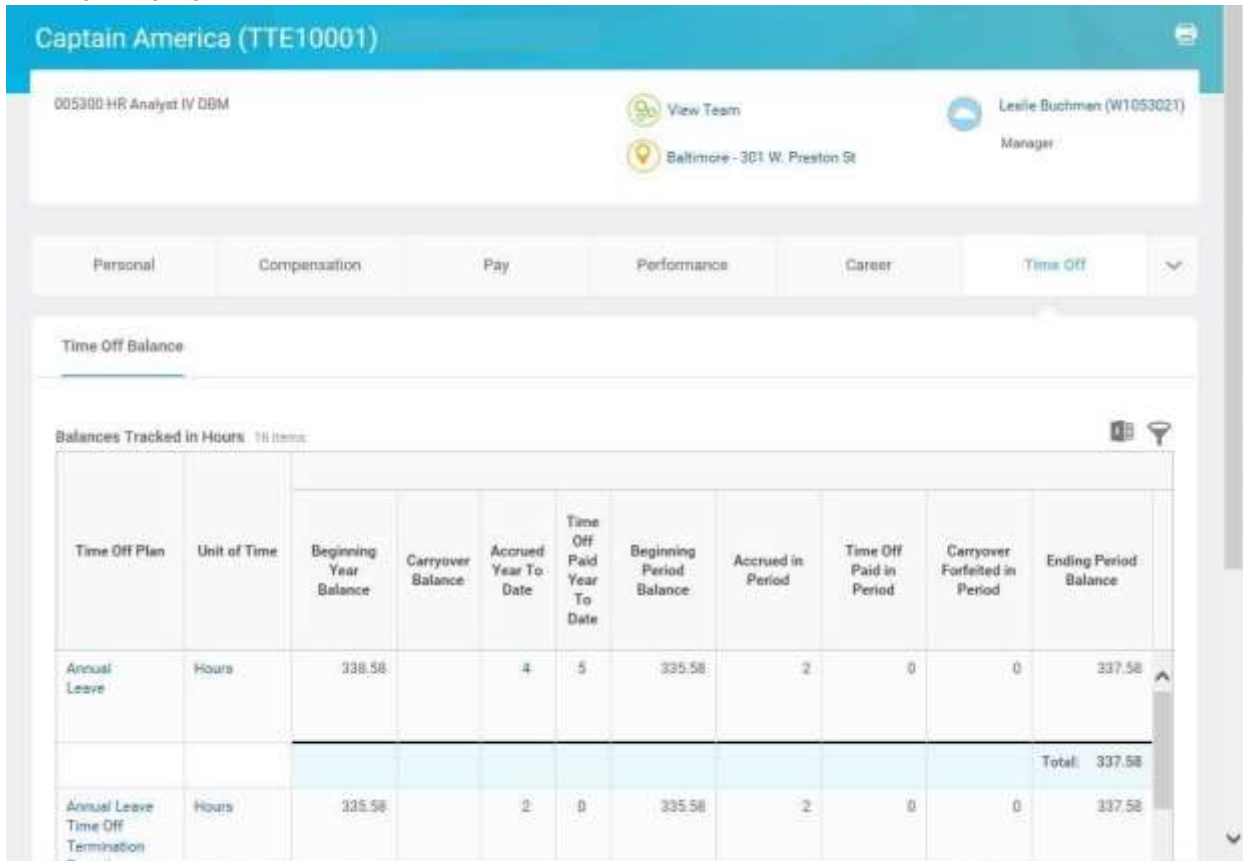
10. Click the **Done**  button.



Information: After clicking the **Done** button, you will return to the **Time Off** tab of the worker's profile if you looked up the time off balances before doing the adjustment.

If you need to access the Time Off tab, you can search for the worker, click the employee link, and then click the **Time Off** tab of the worker's profile.

View Worker



Captain America (TTE10001)

005300 HR Analyst IV DBM

View Team | Leslie Buchman (W1053021) Manager

Baltimore - 301 W. Preston St

Personal | Compensation | Pay | Performance | Career | **Time Off**

Time Off Balance

Balances Tracked in Hours: 11 items

Time Off Plan	Unit of Time	Beginning Year Balance	Carryover Balance	Accrued Year To Date	Time Off Paid Year To Date	Beginning Period Balance	Accrued in Period	Time Off Paid in Period	Carryover Forfeited in Period	Ending Period Balance
Annual Leave	Hours	338.58		4	5	335.58	2	0	0	337.58
Total:										337.58
Annual Leave Time Off Termination	Hours	335.58		2	0	335.58	2	0	0	337.58

11. View the updated leave balances. Verify that the appropriate balance was updated.

12. The System Task is complete.