

View Carryover Balances

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

Procedure:

1. Search for the employee.

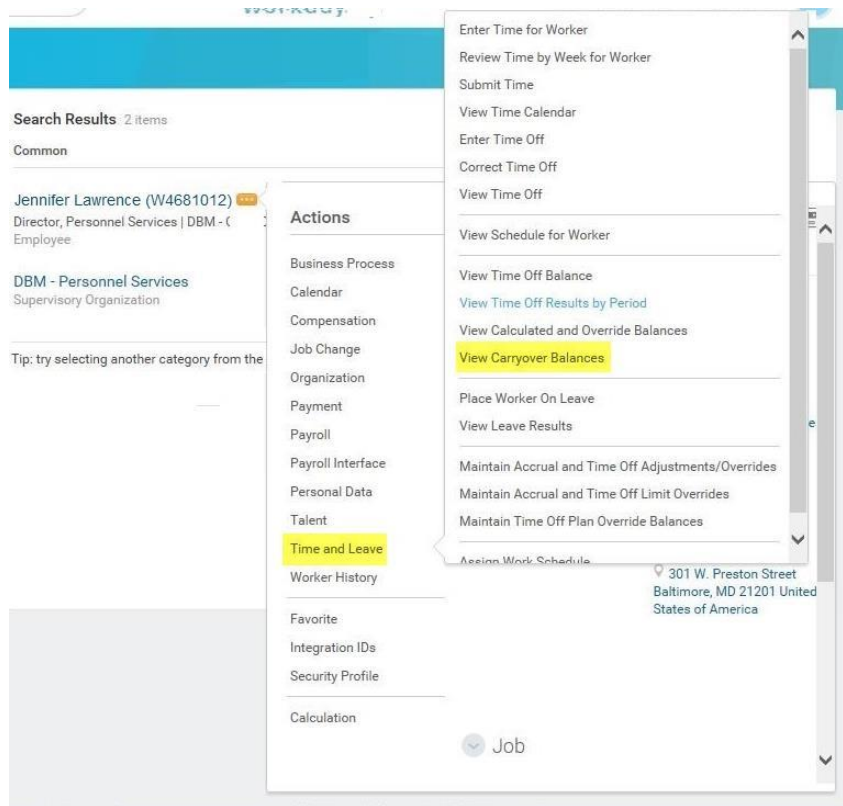


Tip: To find an employee....

- Type the employee name or employee ID in the **search** field. Then, click the **search** icon or click the **Enter** key. **OR**
- Find the employee in their assigned Supervisory Organization on **Members** tab.

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

Search Results – View Available Actions



The screenshot displays the search results for Jennifer Lawrence (W4681012), Director, Personnel Services | DBM - (Employee). The interface shows a list of actions available for this employee, with 'View Carryover Balances' highlighted in yellow. The dropdown menu includes the following options:

- Enter Time for Worker
- Review Time by Week for Worker
- Submit Time
- View Time Calendar
- Enter Time Off
- Correct Time Off
- View Time Off
- View Schedule for Worker
- View Time Off Balance
- View Time Off Results by Period
- View Calculated and Override Balances
- View Carryover Balances**
- Place Worker On Leave
- View Leave Results
- Maintain Accrual and Time Off Adjustments/Overrides
- Maintain Accrual and Time Off Limit Overrides
- Maintain Time Off Plan Override Balances
- Assign Work Schedule

The 'Time and Leave' category in the left-hand navigation menu is also highlighted in yellow. The address '301 W. Preston Street, Baltimore, MD 21201 United States of America' is visible at the bottom right of the interface.

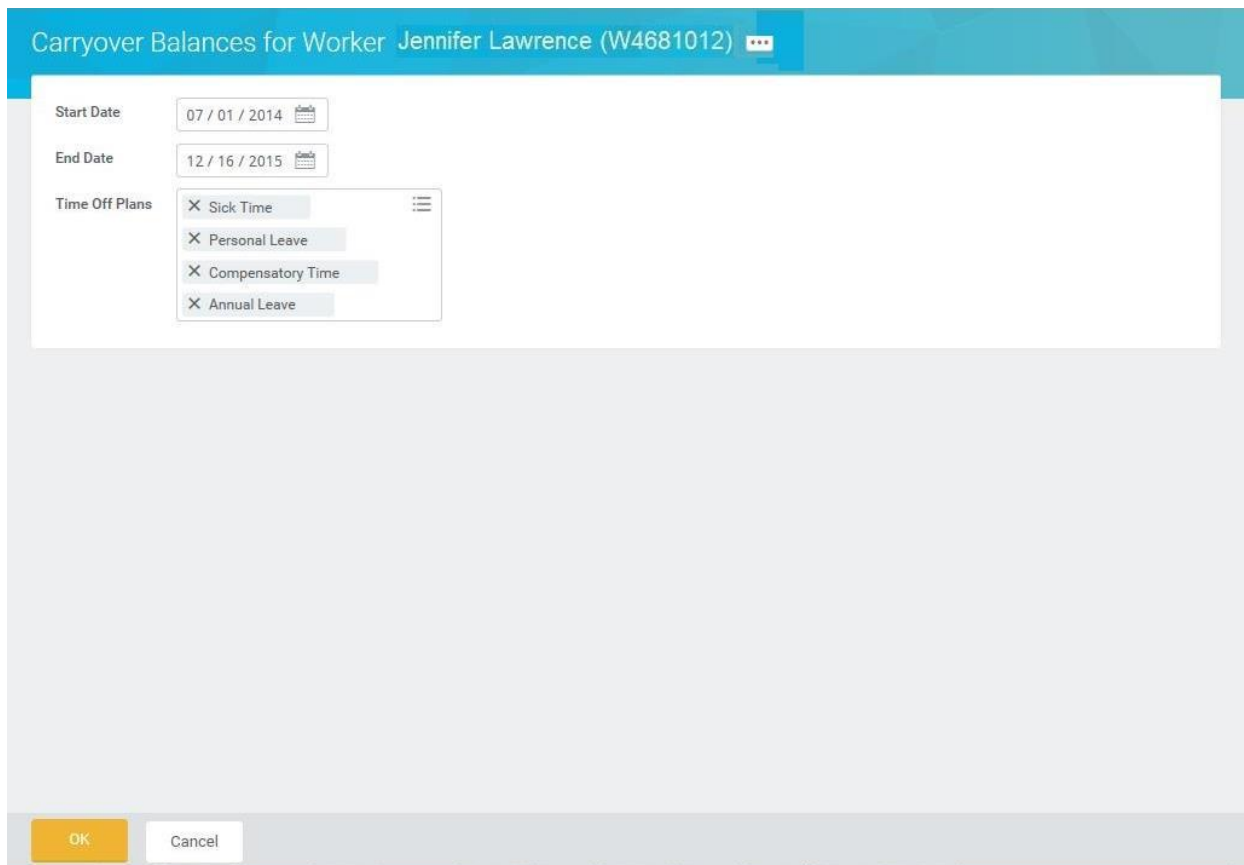
3. In the menu, hover over Time and Leave, then click View Carryover Balances.

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



4. 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.

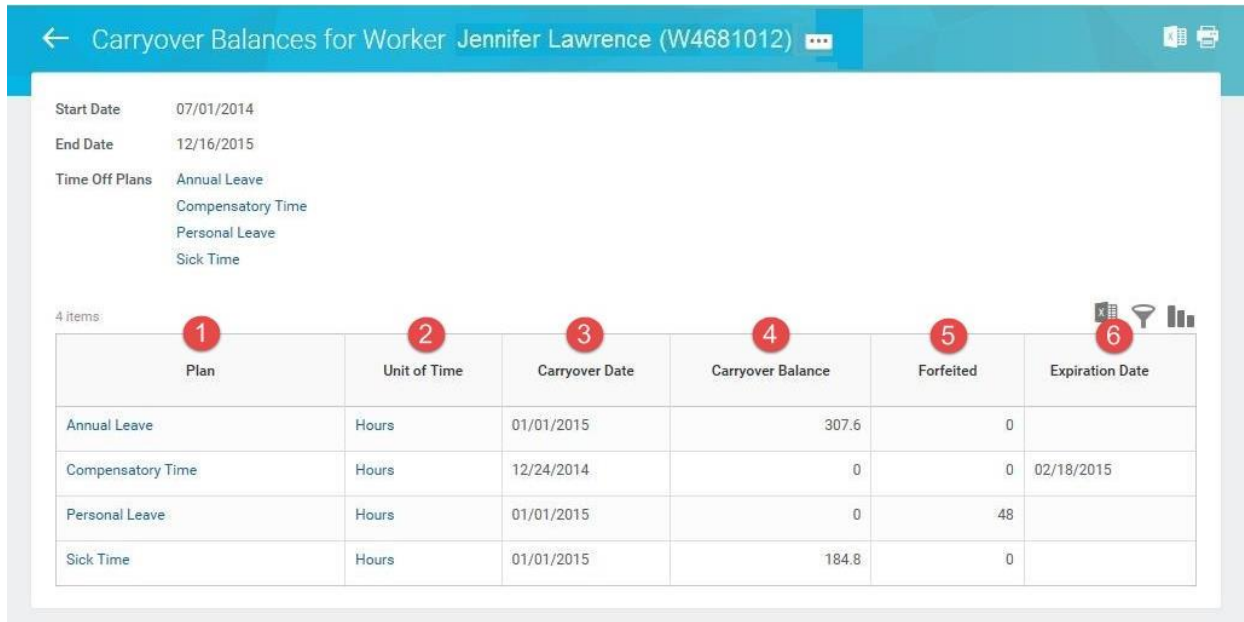
Carryover Balances for Worker



OK Cancel

5. Click the **OK**  button.

Carryover Balances for Worker



Start Date: 07/01/2014
 End Date: 12/16/2015
 Time Off Plans: Annual Leave, Compensatory Time, Personal Leave, Sick Time

Plan	Unit of Time	Carryover Date	Carryover Balance	Forfeited	Expiration Date
Annual Leave	Hours	01/01/2015	307.6	0	
Compensatory Time	Hours	12/24/2014	0	0	02/18/2015
Personal Leave	Hours	01/01/2015	0	48	
Sick Time	Hours	01/01/2015	184.8	0	

6. Review the carryover balance information.

Carryover Balances for Worker

#	Column	Desc
1	Plan	Leave types that were selected on the previous page.
2	Unit of Time	Unit of time for the leave type (e.g., hours).
3	Carryover Date	Date that the balance for the leave plan was carried over to the next 12-month period.
4	Carryover Balance	Leave balance that was carried over to the next 12-month period.
5	Forfeited	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	Expiration Date	Date that balances expire in the time frame selected (e.g., 7/1/2014 – 6/30/2015, if applicable).

7. The System Task is complete.