Special Compensatory Leave Audit Report

Overview

Access the Special Compensatory Leave Audit Report in the Management Reports module of the People First system. The report provides agencies information about special comp leave balances for Special Comp - Pre 7/2012, Special Comp – Holiday, and Special Comp - Closures and the corresponding expiration dates for each balance for each employee. The report is real-time and reflects an employee’s current balances as of the point in time the report is processed.

Definitions

The report includes the following fields:

- Appointment ID – Employee’s People First Appointment ID (PERNK)
- Last Name – Employee’s last name
- First Name – Employee’s first name
- Leave Type – the type of Special Comp leave (i.e. Special Comp – Holiday, Special Comp – Closures)
- Leave Type Code – the leave type code for the Special Comp leave type (i.e. 91, 94, or 96)
- Transaction– the transaction type for the record (i.e. adjustment, accrual, used)
- CBU – the collective bargaining unit code and text
- Effective Date – the date the Special Comp leave was accrued or the effective date of the leave adjustment
- Leave Used Date – the date the leave was used
- Hours – the number of hours adjusted, accrued, or used
- Balance – the balance for the special comp type as of the effective date presented for this row in the report
- Special Comp Exp Date – the date on which the Special Comp leave will expire
  - Special Comp – Holiday, must be used by this date. If leave is not used, and the employee is eligible to keep the remaining hours, the agency must process a leave balance adjustment to move the remaining balance to the Special Comp – Holiday Carry-Over bucket for employee use.
    - The Special Comp – Holiday bucket validity periods are 11/01 – 04/30 and 05/01 – 10/31.
  - Special Comp – Holiday Carry-Over, if not used, and the employee is eligible to keep the remaining hours, the agency must process a leave balance adjustment effective the first day of the new accrual period to add the leave back in the Special Comp – Holiday Carry-Over bucket for use.
The Special Comp – Holiday Carry-Over bucket expiration date is April 30 (April 29 if leap year) and October 29 each year.

- Special Comp – Closures, must be used by this date. If not used by this date, and the employee is eligible to keep the remaining hours, the agency must process a leave balance adjustment to move the remaining balance to the Special Comp – Closures Carry-Over bucket for employee to use.

**Filters**

*The following filters are included in the report:*

- **Agency** – Required filter; defaults to your agency’s OLO code.
- **CBU** – Optional filter. Enter the CBU to run the report for.
- **Appointment ID** - Optional filter. Enter the employee’s People First employee ID. If used, the system will require the Current Balance check box to be marked or the Start Date to be entered.
  - **Important Note**: You must enter either an appointment ID in the “Appointment ID” filter or enter a date in the “Balance As of Date” filter to process the report.
- **Leave Type** – Required filter. Select the leave type to view (0001 for Special Comp – Holiday; 0002 for Special Comp – Closures)
- **Current Balance** – Optional filter. When selected, the report will produce all transaction types that were part of the current balance as of the Start Date filter for the “Appointment ID” entered.
  - **Important Note**: This filter is ONLY valid if using the “Appointment ID” filter.
- **Start Date** – Optional filter. Enter the date from which the report is to be run or use the calendar tool to select the desired date.
  - **Important Note**: Special Comp – Holiday (91) and Special Comp – Closures (94) leave types did not exist prior to July 1, 2012.
  - **Important Note**: Special Comp – Holiday CO leave type did not exist prior to April 2018.
- **Balance As of Date** – Optional filter. When selected, the report will produce all employees’ balances for the month selected; Current Balance and Start Date should NOT be selected when using this filter.
  - **Important Note**: Either an appointment ID in the “Appointment ID” filter or enter a date in the “Start Date” or “Balance As of Date” filter to process the report.
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Sort Hierarchy

The report uses the following sort sequence:

- Appointment ID – ascending order
- Effective Date – descending order

Authorization

Users with a security role code of A, B, C, F, G, H, I, K, M, N, S, T, U, X and Y will be able to process this report.

Process Steps

Step 1: Select Manager landing > Reports > Time & Attendance Reports
Step 2: Select Special Compensatory Leave Audit Report
Step 3: Select/Enter the filter values
Step 4: Select Run Report button

If the report finishes in less than three minutes, the report details display in a grid. To view the report as a PDF, select Export to PDF. To view the report in Excel, select Export to Excel. PDF reports are formatted for printing, while Excel reports are unformatted so that the user can work with the data as needed.

If the report takes more than three minutes, you will receive a message that you can access the report in the Previous Reports section. The report will be available in the Previous Reports section with the status of the report shown in the Processed column. If a red circle is displayed, the report is still processing. If a green circle is displayed, select View to access the report details.

If there is no data available for the report criteria, you will receive a message stating “No records found” If you enter invalid selection criteria, you will see an error message that the value is either invalid or that you do not have authorization to the data.

Report Selection Criteria Sample

Below is a sample of the report selection criteria screen:
### Special Compensatory Leave Audit Report

#### Report Sample

For best results, print this report as landscape, letter size. Below is a sample of the report:

<table>
<thead>
<tr>
<th>APPT ID</th>
<th>LAST NAME</th>
<th>FIRST NAME</th>
<th>LEAVE TYPE</th>
<th>LEAVE TYPE CODE</th>
<th>TRANSACTION TYPE</th>
<th>CBU</th>
<th>EFFECTIVE DATE</th>
<th>LEAVE USED DATE</th>
<th>HOURS</th>
<th>BALANCE</th>
<th>SPECIAL COMP EXP DATE</th>
</tr>
</thead>
<tbody>
<tr>
<td>00100037</td>
<td>WALKER</td>
<td>JULIE</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
<td>35.25</td>
<td>35.25</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00100532</td>
<td>WILLIAMS</td>
<td>CAROLYN</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
<td>8.00</td>
<td>8.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00100638</td>
<td>MORIN</td>
<td>RANDY</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
<td>12.75</td>
<td>12.75</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00100673</td>
<td>ARROYO</td>
<td>MANUEL</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
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<td>4.00</td>
<td></td>
<td></td>
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<tr>
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<td>RILEY</td>
<td>SUSAN</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
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<td>28.75</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00100947</td>
<td>WILSON</td>
<td>DANA</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
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<td>52.00</td>
<td></td>
<td></td>
</tr>
<tr>
<td>00100970</td>
<td>NORRIS</td>
<td>LEROY</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
<td>4.75</td>
<td>4.75</td>
<td></td>
<td></td>
</tr>
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<td>00100993</td>
<td>MCCRAY</td>
<td>SONJI</td>
<td>SPECIAL COMP - HOLIDAY</td>
<td>91</td>
<td>BALANCE</td>
<td>06-SECURITY SERVICES</td>
<td>04/30/2018</td>
<td>54.25</td>
<td>54.25</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

*This report may contain information that is confidential under state or federal law. Improper access or release of such information may be a violation of these laws.*