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 General Leave Processing guide.

Definitions
The following buttons are included on the Leave Balance Adjustments screen.

- Timesheet – Takes the user to the most recent unapproved timesheet for the employee selected.
- Adjustments History – Allows the user to view all leave balance adjustments for the leave type selected in the overview section.
- New – Select to create a leave balance adjustment.

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

- Leave Type – The following leave types can be adjusted.
  - Annual leave
  - Sick leave
  - Military training leave
  - Regular comp leave
  - Special comp leave (55, 94, 91, 96)
  - FLSA comp leave
  - Personal Holiday
- 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.

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; the choice of leave types are available in the drop down menu.
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- Number of Adjustment Hours – Required field; defaults to zero. Enter the number of hours for the balance adjustment.
  - Only one pending adjustment is allowed per leave type; if a negative adjustment is being processed, the amount of adjustment may not exceed the overall balance for the leave type. If more than one adjustment per leave type is processed, the last record entered will be processed.
  - 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, except for leave type 91 – SC Holiday).
  - If a future dated adjustment is created, it will remain viewable and editable until time evaluation runs on that future date.
  - Use a negative entry to decrease the leave balance, e.g., enter -10.00 to reduce the leave balance by 10 hours.
  - Adjustments can be processed using up to three decimal places.

- Comments – Required field; enter a statement to identify why the adjustment is being processed. A maximum of 255 characters may be entered.

- Save – Saves the adjustment entered.

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

Update Balances – once the adjustment has been saved, an Update Balances appears. When the Update Balances button is selected, the time evaluation job will be activated to update the employee’s balances.

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 Manager > My Team.

Step 2: Select the employee.

Step 3: Select Time and Attendance > Leave Balance Adjustments.

Step 4: Select “New.”

Step 5: Enter the date of adjustment.
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**Step 6:** Select the leave type record to adjust (annual, sick, military training leave, etc.) by utilizing the drop down menu. Each leave type must be adjusted separately.

**Step 7:** Enter the number of adjustment hours. Use a negative entry to decrease the leave balance.

**Step 8:** Enter comments (reason for the adjustment).

**Step 9:** Select “Save.”

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Remaining Leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>Military Training Leave</td>
<td>240.00</td>
</tr>
<tr>
<td>Annual Leave</td>
<td>159.50</td>
</tr>
<tr>
<td>Sick Leave</td>
<td>2.50</td>
</tr>
</tbody>
</table>

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