Leave Balance Overview Screen

Overview

The Leave Balance Overview screen is used to display all accrued leave balances (annual, sick, personal holiday, regular, special, FLSA comp leave, etc.) and related transactions (adjustments, used hours, accruals, etc.). Balances on this screen are updated by the time evaluation process (refer to the Time Evaluation Process guide for additional details). This screen is not valid for the State Courts System or Justice Administrative Commission.

Definitions

The following are details about this screen and how it is updated:

- The screen is view only and cannot be directly updated by any user. All updates occur through other leave and attendance processes (time evaluation, timesheet, leave payouts, adjustments and transfers) and are fed into the Leave Balance Overview screen based on the updates from these other processes into time evaluation.

- The screen includes a quick link (titled Go to Timesheet) to allow the employee to navigate between the timesheet and Leave Balance Overview screen.

- Only leave types that the employee either previously had a balance of or transaction for during the period show in the Pay Period Overview section. If the employee did not have a leave balance or a transaction processed for a given leave type for a given pay period, the leave type will not be displayed in the Pay Period Overview section. Leave types are dynamically presented.

- Annual, sick, regular, special and FLSA comp balances are all presented as hours. The personal holiday is presented as a quota (“Available” will be displayed if the employee has not taken his or her personal holiday or 0.00 will be displayed if the employee has taken the personal holiday).

- Special comp is broken out into four separate columns: Pre-July 2012 (leave type 0055), Holiday (leave type 0091), Holiday Carry-Over (leave type 0096), and Office Closure (leave type 0094).

The following fields are included in the Leave Balance Overview screen:

- Overview Section – Includes each pay period (payroll period) the employee was employed in a leave accruing position (up to 18 months back) and, if still active in a leave accruing position, presents at least the next six months of pay periods. Users select the applicable pay period in this section to view details for a specific pay period.

  - Users are defaulted to the current pay period unless accessing the screen from the employee timesheet. If accessing by selecting the link on the timesheet, the user is defaulted to the period that was selected on the timesheet.

  - Use the scroll bar to move through the pay periods.
The Leave Balance Overview > Details screen is broken into two sections: Current Balances and Pay Period Overview.

The following fields are shown in the Current Balances section:

- Total Hours Available – Includes the current available hours as of the system date for each available leave type. For the personal holiday, “Available” will be displayed if the employee has not taken the personal holiday for the fiscal year the system date falls within. If the employee has taken the personal holiday, 0.00 will be displayed.

- Date – Current date.

- Pending Timesheet Hours – Hours pending (hours saved on a timesheet that are pending approval, leave adjustments that are pending processing through the nightly batch time evaluation process, leave payout pending payment or leave transfer hours pending the nightly batch time evaluation process). Hours shown as pending are locked to prevent negative balances in the total net hours available (current balance minus pending hours) for each leave type the employee has a current balance in. If the hours are pending on the timesheet, the hours will be bolded and underlined, and become a hyperlink. When the hyperlink is selected, a new overlay window will open, the date and number of hours used on that date are shown.

- Net Hours Available – The balance of total hours available minus pending timesheet hours

<table>
<thead>
<tr>
<th>Current Balances</th>
<th>Date</th>
<th>Annual Leave</th>
<th>Sick Leave</th>
<th>Regular Comp Leave</th>
<th>Special Comp - Pre 7/2012</th>
<th>Personal Holiday</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Hours Available</td>
<td>03/19/2018</td>
<td>533.503</td>
<td>797.751</td>
<td>0.000</td>
<td>10.000</td>
<td>0.000</td>
</tr>
<tr>
<td>Pending Timesheet Hours</td>
<td>03/19/2018</td>
<td>8,000</td>
<td>2,500</td>
<td>0.000</td>
<td>0.000</td>
<td>0.000</td>
</tr>
<tr>
<td>Net Hours Available</td>
<td>03/19/2018</td>
<td>525.503</td>
<td>795.251</td>
<td>0.000</td>
<td>10.000</td>
<td>0.000</td>
</tr>
</tbody>
</table>

The following fields are shown in the Pay Period Overview section:

- Beginning Balance – Provides the current available hours as of the system date for each available leave type. The personal holiday will be displayed as “Available” if the employee has not taken his or her personal holiday. If the employee has taken the personal holiday, 0.00 will be displayed.

- Date – Pay period begin date.

- If applicable, present hours for each leave type in the following categories:
  - Used – Leave used.
  - Accrual – Leave accrued.
  - Rollover – Leave rolled over (e.g., career service rollover of annual leave greater than 360 hours on Dec. 31 of each year, etc.)
  - Adjustments – Leave adjusted.
  - Expired – Leave expired (e.g., special comp holiday, etc.).
  - Payout – Hours paid (e.g., FLSA special comp, etc.).
Leave Balance Overview Screen

- Hours Transferred In – Leave balance transfer hours received from prior employing agency.
- Hours Transferred Out – Leave balance transfer hours sent to new employing agency.
- SES/SMS Pro-Rated Hours – Number of annual leave hours pro-rated upon termination or transfer to a different pay plan based on the employee’s SES/SMS Leave Accrual Date on the Key Service Date screen.
- Pending Approval – Hours submitted on employee’s timesheet but pending approval.
  - Ending Balance – The balance of beginning hours minus timesheet hours in one of the above listed categories.

<table>
<thead>
<tr>
<th>Pay Period Overview</th>
<th>Date</th>
<th>Annual Leave</th>
<th>Sick Leave</th>
<th>Special Comp Pre 2/7/2012</th>
<th>FLSA SC Leave</th>
</tr>
</thead>
<tbody>
<tr>
<td>Beginning Balance</td>
<td>03/09/2018</td>
<td>533.503</td>
<td>797.751</td>
<td>10.000</td>
<td>1.000</td>
</tr>
<tr>
<td>Ending Balance</td>
<td>03/22/2018</td>
<td>533.503</td>
<td>797.751</td>
<td>10.000</td>
<td>1.000</td>
</tr>
<tr>
<td>Pending Approval</td>
<td>N/A</td>
<td>8.000</td>
<td>1.000</td>
<td>0.00</td>
<td>0.00</td>
</tr>
</tbody>
</table>

- Negative balances are not displayed in the Pay Period Overview section. If the employee has a negative balance, the ending balance is presented as zero.
- Future dated actions are not shown in the Pay Period Overview section until that future date is the current system date.

Authorization

Users with a security role code of A, B, C, D, E, F, G, H, I, K, M, N, S, T, U, X and Y will be able to view the Leave Balance Overview screen.

Process Steps

There are several options to access the Leave Balance Overview screen:
- Option 1: Employee Landing Page > My Timesheet Quick Link > Leave Balance Overview icon
- Option 2: Manager Landing Page > My Team > Select Appointment ID > Time and Attendance > Timesheet > Leave Balance Overview
- Option 3: Employee Landing Page > Time and Attendance > Leave Balance Overview
## Leave Balance Overview Screen

### Payroll Period
- **03/09/2018-03/22/2018**
- **03/23/2018-04/05/2018**
- **04/06/2018-04/19/2018**

### Current Balances

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<tr>
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<tr>
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