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UNIVERSITY OF ALBERTA

PeopleSoft HCM

# Reviewing Employee Leave Balances

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# **Training Guide**

## **Reviewing Employee Leave Balances**

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## Reviewing Employee Leave Balance

You can view an employee's leave and compensatory time balances as of the date specified for the timesheet.

- Hourly employees do not accrue vacation, therefore you should only see a blank page - this is normal.
- APOs, TAPS and Librarians are not enrolled in benefit leave banks or compensatory time banks, therefore the Leave/Compensatory Time tab is not available.
- As a Timekeeper you have access to view all balances that employees cannot see on their own timesheet (e.g. Casual Illness, Special Leaves).

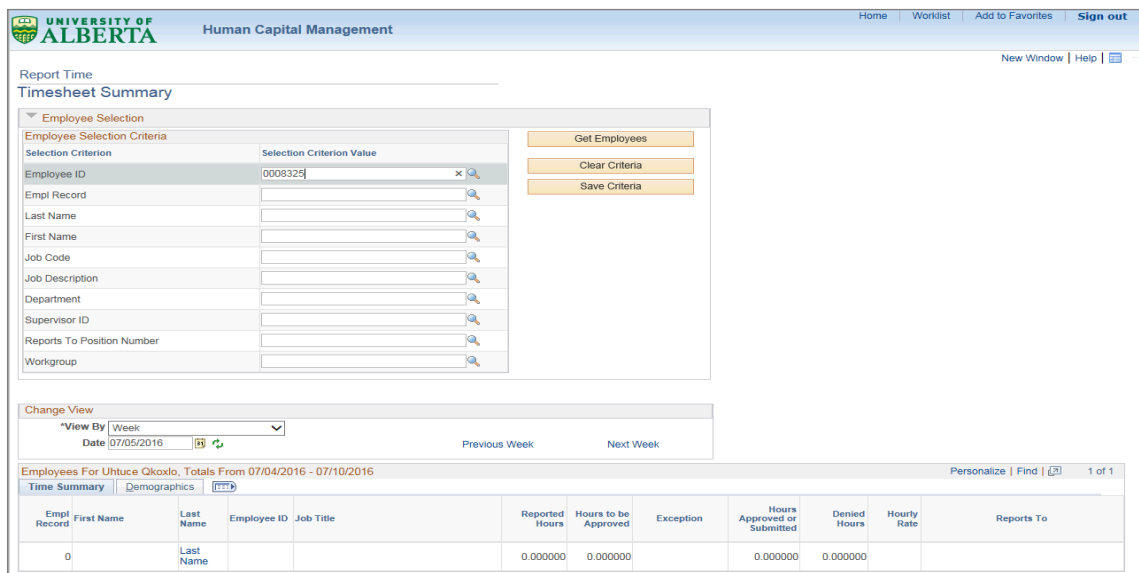
In this topic, you will learn how to review employee leave balances.

### Procedure

Navigation Path: [Main Menu](#) > [Manager Self Service](#) > [Time Management](#) > [Report Time](#) > [Timesheet](#)

1. Once you have navigated to the **Timesheet Summary** page you need to Get Employees.

You can use the fields within the Selection Criterion area to look up a specific employee or you can leave all fields blank to view all employees within your department.



Empl Record	First Name	Last Name	Employee ID	Job Title	Reported Hours	Hours to be Approved	Exception	Hours Approved or Submitted	Denied Hours	Hourly Rate	Reports To
0		Last Name			0.000000	0.000000		0.000000	0.000000		

## Training Guide

### Reviewing Employee Leave Balances

- In this example, Employee ID 0008325 is used to search for an individual employee.

Click the **Get Employees** button.



- To access the Timesheet page, Click the **Last Name of Employee** link.
- To view the employee's Leave Balances, Click the **Leave / Compensatory Time** tab.
- The **Leave/Compensatory Time** tab displays the Employee's Recorded Balance in real time and is updated as soon as time is submitted.

This includes any future vacation time submitted.

**Timesheet**

**Sitquq Atofmvuq**  
Research Technician

Department: ALES AFNS Kinsella Research St  
Department ID: 100347  
Reports to:

Employee ID: 0008325  
Empl Record: 0  
Earliest Change Date: 07/01/2016

Actions ▾  
Select Another Timesheet

\*View By: Calendar Period ▾      Previous Period    Next Period  
    Previous Employee    Next Employee

\*Date: 07/01/2016        Reported Hours: 0.000


From Friday 07/01/2016 to Friday 07/15/2016

Fri 7/1	Sat 7/2	Sun 7/3	Mon 7/4	Tue 7/5	Wed 7/6	Thu 7/7	Fri 7/8	Sat 7/9	Sun 7/10	Mon 7/11	Tue 7/12	Wed 7/13

Reported Time Status   Summary   **Leave / Compensatory Time**   Exceptions   Payable Time

Leave and Compensatory Time Balances <input type="button" value="🔍"/>		Recorded Balance	Leave Balance Details
Leave	General Illness	960.000	<input type="button" value="🔍"/>
Leave	Vacation	336.389	<input type="button" value="🔍"/>
Leave	Casual Illness	80.000	<input type="button" value="🔍"/>
Leave	Special Leaves	80.000	<input type="button" value="🔍"/>
Comp Time	NEWBANKTM	52.000	<input type="button" value="🔍"/>

[Return to Select Employee](#)

- To view the details of leave balance, click the **Leave Balance Details** graphic. 

7. The details page provides the leave balances by type (Vacation, Casual Illness, General Illness and Special Leave).

You can also look at the days taken and the number of hours associated with each day.

**Leave and Banked Time\*** Employee ID 0008325  
Empl Record 0

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**Vacation** ?

Vacation Balance in Hours as of 05-Jul-2016						
Carried Forward	Earned YTD	Taken YTD	Adjusted YTD	Hours Taken Unprocessed	Hours Adjusted Unprocessed	Balance
226.542	109.846	0.000	0.000	0.000	0.000	336.389

Vacation History			Find   View 100   [grid]   [print]	First 1-10 of 311 Last
Date	Description	Hours		
11/02/2015	Vacation Time Taken	8.000		
10/26/2015	Vacation Time Taken	8.000		
10/23/2015	Vacation Time Taken	8.000		
10/21/2015	Vacation Time Taken	8.000		
10/14/2015	Vacation Time Taken	8.000		
10/13/2015	Vacation Time Taken	8.000		
10/09/2015	Vacation Time Taken	8.000		
10/08/2015	Vacation Time Taken	8.000		
10/07/2015	Vacation Time Taken	8.000		
10/06/2015	Vacation Time Taken	8.000		

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**Casual Illness** ?

Casual Illness Balance in Hours as of 05-Jul-2016						
Carried Forward	Earned YTD	Taken YTD	Adjusted YTD	Hours Taken Unprocessed	Hours Adjusted Unprocessed	Leave Hours Balance
0.000	80.000	0.000	0.000	0.000	0.000	80.000

Casual History			Personalize   Find   View All   [grid]   [print]	First 1-10 of 37 Last
Date	Description	Hours		
01/20/2011	Casual Illness Leave	8.00		
12/09/2010	Casual Illness Leave	8.00		
02/03/2010	Casual Illness Leave	4.00		
01/28/2010	Casual Illness Leave	8.00		
01/23/2010	Casual Illness Leave	8.00		
01/22/2010	Casual Illness Leave	8.00		
01/21/2010	Casual Illness Leave	8.00		
12/07/2009	Casual Illness Leave	4.00		
12/03/2009	Casual Illness Leave	8.00		
11/27/2009	Casual Illness Leave	4.00		

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**General Illness** ?

**Note:** Employees can only view their Vacation and Banked Time balances.

Timekeepers and Supervisors have access to view all Leave balances for employees within their own Faculty/Department.

8. Banked Time balances are specific to each job (in case of multiple jobs).

Banked Time balances are displayed as follows:

- 1st row is for the actual Overtime entered
- 2nd row shows the calculated time

For example, if an employee codes 7 hours to Banked Time @ x2, the Banked Time balance will show 2 rows at 7 hours each.

**Note:** The “Leave/Compensatory Time” tab will display the Employee’s Recorded Balance in real time (i.e. – as soon as you enter any Vacation/Leave time on the timesheet and click on ‘Submit’ the Recorded Balance gets updated)

The “Leave and Banked Time” page will not be updated until all the payroll processes have been completed (i.e. this page reflects the balances as of the last pay period and will not include any future vacation time entered).

9. The **Leave and Banked Time** page reflects the balances as of the last pay period and does not include any future vacation time entered. This page is not updated until all the payroll processes have been completed.
10. Congratulations! You have now completed the training on Reviewing Employee Leave Balances.

For reference materials and more tutorials please see the links provided below.

#### **End of Procedure.**



For **Employees**, all PeopleSoft HCM Learning Reference Materials are available within the Faculty & Staff website under the applicable sections of the Employee Self Service web page (<https://www.ualberta.ca/faculty-and-staff/my-employment/employee-self-service>).



For **HR Professionals**, all PeopleSoft HCM Learning Reference Materials are available within the Human Resource Services website under the PeopleSoft Training web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training>).



Refer to the Online Learning web page (<https://www.ualberta.ca/human-resource-services/managing-administration/peoplesoft-training/online-learning>) within the Human Resource Services website for all Online Tutorials and videos.