



# PeopleSoft HR Leave Accruals | Employee Self Service

## Viewing Your Leave Accrual Balances

### NAVIGATE TO YOUR LEAVE BALANCE PAGES

Once logged into PeopleSoft, click Main Menu at the top of the page and then navigate to Self Service > Time Reporting.

On the Time Reporting page, you'll find two options available for you to review your leave accrual balances.

The screenshot shows the PeopleSoft navigation interface. At the top, there are 'Favorites' and 'Main Menu' dropdowns. Below them is a search bar. A 'Main Menu' dropdown is open, showing a list of folders: Self Service, Manager Self Service, Recruiting, Workforce Administration, and Benefits. A sub-menu is open for 'Self Service', showing folders for Personal Information, Payroll & Compensation, Benefits, Time Reporting (highlighted with a green box and a mouse cursor), and Learning & Development. Below the navigation is the 'Time Reporting' page header with the Oracle logo and a search bar. The page content includes a 'Time Reporting' icon and two main options: 'View Leave Balance Summary' (with a sub-link 'View leave balances') and 'View Leave Balance Details' (with a sub-link 'Hours Earned, Hours Taken, and Remaining Balances for Leave Plans').

### LEAVE BALANCE SUMMARY PAGE


The **Leave Balance Summary** page displays a concise and simple snapshot of all your current leave balances as of the last payroll run.



Name		ID		Empl Record	0	Benefit Record Number	0								
Payroll Status	A	Active		Standard Hours	35.00	Standard Day	7.00								
<b>Current Leave Balances</b>				Personalize   Find   [Print]   [Grid]		First [Left Arrow] 1-2 of 2 [Right Arrow] Last									
Plan Type	Leave Hours Balance		Last Accrual Process Date												
Vacation	104.060000		10/31/2017												
Vacation Bonus Time (BC)	0.000000		10/14/2017												
Maximum Vacation on Next Anniversary Date:	154.000000														
<table border="1"> <thead> <tr> <th>Service Date</th> <th>Years</th> <th>Months</th> <th>Days</th> </tr> </thead> <tbody> <tr> <td>01/30/2017</td> <td>1</td> <td>2</td> <td>26</td> </tr> </tbody> </table>								Service Date	Years	Months	Days	01/30/2017	1	2	26
Service Date	Years	Months	Days												
01/30/2017	1	2	26												

## LEAVE BALANCE DETAILS PAGE


The **Leave Balance Details** page displays your previously earned time, previously taken time, current balances, approved time to be processed, and projected future balances.



**Note:** You can also navigate to your Leave Balance Details page from your Timesheet when requesting time off.

Name <input type="text"/>	ID <input type="text"/>		<a href="#">View the Benefits Handbook</a>
Payroll Status <b>A</b> Active	Standard Hours 35.00		Standard Day 7.00

Year: <input type="text" value="2017"/>	To view a different year, enter the desired year and click on the Refresh Data button below.
*Plan Type: <input type="text" value="51"/>  Vacation	
<input type="button" value="Click to Refresh Data"/>	

Vacation forfeit may occur during the February payroll if your balance on January 31, 2019 is above your maximum hours of 154. Based on your service date, your vacation year starts in February and goes thru January.



Leave Balance Details			Personalize   Find    		First	1-18 of 18	Last	
As Of Date	Plan Type	Description	Hours Earned	Hours Taken	Adjusted Hours	Approved Hours Not Processed	Ending Balance in Hours	Ending Balance in Days
02/28/2017	Vacation	Initial Balance					0.000000	0.000
02/28/2017	Vacation	Time Earned	11.800740				11.800000	1.690
03/31/2017	Vacation	Time Earned	13.570851				25.370000	3.620
03/31/2017	Vacation	Time Taken		7.000			18.370000	2.620
04/30/2017	Vacation	Time Earned	11.800740				30.170000	4.310
05/31/2017	Vacation	Time Earned	13.570851				43.740000	6.250
06/30/2017	Vacation	Time Earned	12.980814				56.720000	8.100
07/31/2017	Vacation	Time Earned	12.390777				69.110000	9.870
08/31/2017	Vacation	Time Earned	13.570851				82.690000	11.810
09/26/2017	Vacation	Time Taken		4.000			78.690000	11.240
09/30/2017	Vacation	Time Earned	12.390777				91.080000	13.010
10/31/2017	Vacation	Time Earned	12.980814				104.060000	14.870
10/07/2017	Vacation	** UNPROCESSED TRANSACTIONS **					104.060000	14.870
10/07/2017	Vacation	To Be Processed				7.000000	97.060000	13.870
11/30/2017	Vacation	Estimated Monthly Earn	12.980814				110.040000	15.720
12/12/2017	Vacation	To Be Processed				7.000000	103.040000	14.720
12/14/2017	Vacation	To Be Processed				7.000000	96.040000	13.720
12/31/2017	Vacation	Estimated Monthly Earn	12.390777				108.430000	15.490

Maximum Vacation on Next Anniversary Date:	154.000000						
Service Date	<table border="1" style="margin: auto;"> <tr> <th>Years</th> <th>Months</th> <th>Days</th> </tr> <tr> <td style="text-align: center;">1</td> <td style="text-align: center;">2</td> <td style="text-align: center;">28</td> </tr> </table>	Years	Months	Days	1	2	28
Years	Months	Days					
1	2	28					



This guide will walk you through the **Leave Balance Details** page. The screenshot on the previous page has been divided into sections A through E.

**Section A** displays information related to your employment record, including your standard hours per week and standard hours per day. This section also includes a link to the Benefits Handbook for quick reference.

**Section B** is the view filter, which allows you to filter the details by calendar year and leave plan type. Any time you change the values in the filter, always use the “Click to Refresh Data” button to update the details displayed below.

Potential Leave Plan Types (Monthly Payroll)	Potential Leave Plan Types (Weekly Payroll)
<ul style="list-style-type: none"><li>• 51 Vacation</li><li>• 5Z Vacation Bonus Time (BC)</li><li>• SM Sick Time - Monthly SCM</li></ul>	<ul style="list-style-type: none"><li>• 51 Vacation</li><li>• 5Z Vacation Bonus Time (BC)</li><li>• 50 Sick</li><li>• 5Y Sick Incentive Time (BC)</li><li>• 52 Personal</li></ul>

**Section C** is a warning box that appears when vacation plan details are displayed. This box will help you stay aware of when you may be at risk of forfeiting accrued vacation time.

**Section D** is a table showing your leave balance information based on the filter choices selected above. The table is updated on a nightly basis. When viewing a current calendar year’s plan details, it can be helpful to visually break up the table into three subsections. In the screenshot on the previous page, this is done for you with three different colored boxes.

**Green Box:** Above the **\*\*UNPROCESSED TRANSACTIONS\*\*** row are all previously applied accruals, forfeitures, adjustments, and approved time off requests that have been already been processed by the payroll system.

**Purple Box:** The **\*\*UNPROCESSED TRANSACTIONS\*\*** row is the line delineation between what has already been processed by payroll and what has yet to be processed by payroll. This row will show your “current” leave balance as of the last payroll run.

**Orange Box:** Below the UNPROCESSED TRANSACTIONS row are projected future changes to a leave balance. Hours that display as “To Be Processed” are approved but not yet processed by payroll. These requests could be for dates in the past that were approved too late to be processed by the last payroll run or for dates that will be processed in a future pay period. Hours with this description can still be modified or canceled by employees in their timesheets. “Estimated Monthly Earn” rows show projected monthly accruals and balances up to 12 months into the future based on current employment information. Be aware that the system does not take into account future standard hour changes, transfers/promotions, short work breaks, unpaid leaves, and forfeitures. As a result, these should be treated as calculated forecasts (subject to change) that are there to help you and your supervisor manage your balances appropriately when requesting and approving time.

**Section E** displays your benefits service date, service time, and maximum hours. This section is a helpful tool for understanding your leave accrual rates, years of service milestones, service anniversary dates, and leave forfeiture risks.

Please reach out to your department’s designated leave accrual liaison for further information on understanding your leave accrual balance details.