



THE UNIVERSITY OF BRITISH COLUMBIA

AVP Finance and Operations  
Okanagan Campus

# Workday Wednesday: Maintaining and Updating Absence Balances

February 23<sup>rd</sup>, 2022



# RESOURCES AVAILABLE

[Adjust Employee's Time Off Balance \(Maintain Accruals\)](#)

[Add Additional Job](#)

[End Additional Job](#)

[Change Job: Transfer](#)

[Change Job: Promotion](#)

[Reclassification – New Job Entry Date](#)

[Reclassification – Current Job Entry Date](#)

[HR Vacation Entitlements](#)

# AGENDA

- 1 | Business Processes Where Maintain Accrual and Time Off Adjustments/Overrides Task is Required
- 2 | Viewing Time Off Balances
- 3 | Business Process Where Maintain Accrual and Time Off Adjustments/Overrides Task is Not Required
- 4 | Maintain Accruals and Time Off Adjustments
- 5 | Q+A





**BUSINESS PROCESSES  
WHERE MAINTAIN ACCRUAL  
AND TIME OFF  
ADJUSTMENTS/OVERRIDES  
TASK IS REQUIRED**

# WHEN THE MAINTAIN ACCRUALS TASK IS REQUIRED

This step will appear as a 'To Do' in some HCM business processes, prompting the initiator to review whether the employee's vacation balances need adjusting as a result of a staffing change.

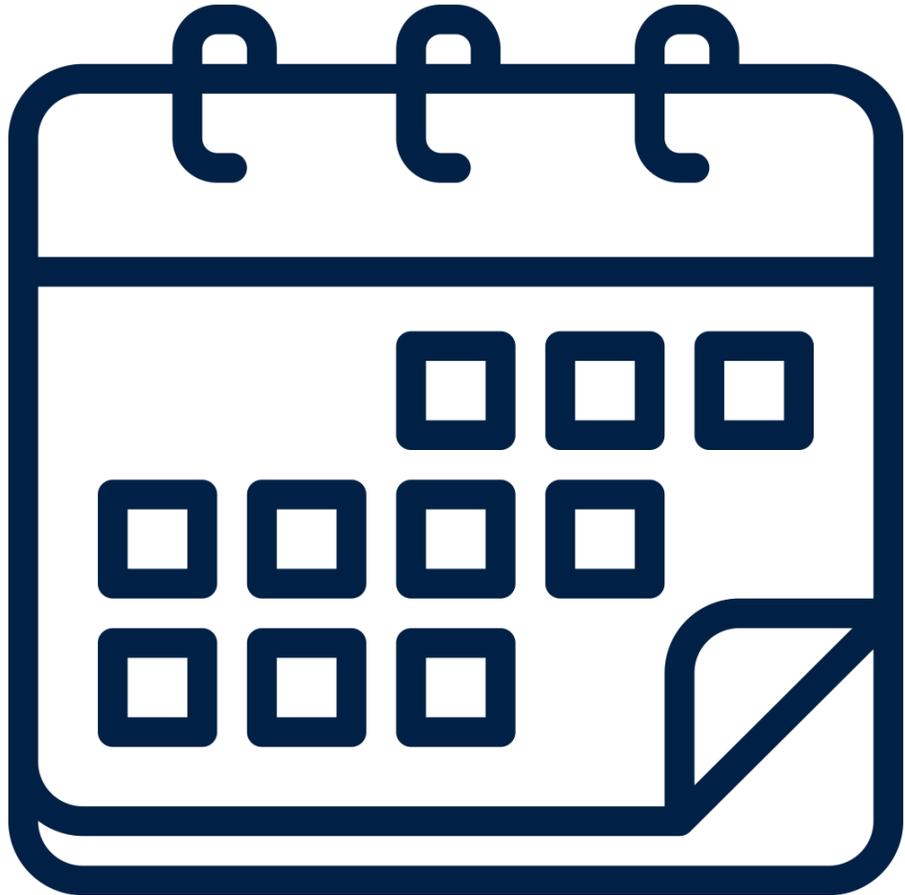
As a standalone process to adjust an employees current accrual plan (e.g. Vacation and Sick Time)

Add Additional Job

End Additional Job

Change Job – **when the employee moves to a new employment group**

- Change Job: Transfer
- Change Job: Promotion
- Change Job: Reclassification (New Job + Current Job Entry Date)



## **VIEWING TIME OFF BALANCES**

# VIEW TIME OFF BALANCE

Click the **Actions** button from the employee profile

The screenshot shows an employee profile page. On the left, a red sidebar contains navigation options: 'Actions', 'Email', 'Summary', 'Overview', 'Job', 'Competency', 'Pay', 'Time Off', 'Talent', and 'Personnel'. The 'Time and Leave' option is highlighted. The 'Actions' menu is open, showing a list of options: 'View Time Off', 'Overtime Requests', 'View Schedule for Worker', 'Add Time Clock Event', 'View Time Clock History', 'View Time Off Balance' (highlighted with a blue bar), 'View Time Off Results by Period', 'View Calculated and Override Balances', 'View Carryover Balances', 'Place Worker On Leave', 'View Leave Results', 'Adjust Calculated Time', 'Maintain Accrual and Time Off Adjustments/Overrides', 'Maintain Accrual and Time Off Limit Overrides', 'Maintain Time Off Plan Carryover Overrides', and 'Maintain Time Off Plan Override Balances'.

Click **Time and Leave**

Click **View Time Off Balance**

Select **As Of Date**

The screenshot shows a dialog box titled 'Time Off Balance'. It has a close button (three dots) in the top right corner. Below the title, there is a label 'As Of' followed by a date input field containing '2022-02-11' and a calendar icon. At the bottom of the dialog, there are two buttons: an orange 'OK' button and a grey 'Cancel' button.

If you are completing a Change Job BP where the employee is changing employment groups, you will need to note the balance before kicking off the BP.



**BUSINESS PROCESSES  
WHERE MAINTAIN ACCRUAL  
AND TIME OFF  
ADJUSTMENTS/OVERRIDES  
TASK IS **NOT** REQUIRED**

# WHEN THE MAINTAIN ACCRUALS TASK IS NOT REQUIRED

Although this business process will appear as a sub-process to all Job Change processes, it is not always required.

## General Job Changes:

- Change Job: Change Location
- General FTE Change

## Change Job – **When an employees stays within the same employment group and/or dept.**

- Change Job: Faculty Reappointment
- Change Job: Extension
- Change Job: Transfer
- Change Job: Promotion
- Change Job: Reclassification (New Job + Current Job Entry Date)



## **MAINTAIN ACCRUALS AND TIME OFF ADJUSTMENTS**

# MAINTAIN ACCRUALS AND TIME OFF ADJUSTMENTS

1 Initiate the task

A As a Sub-Process...

The initiator of an 'Add Additional Job' or 'Change Job' BP will receive the **sub-process Update Vacation Balances for Employee** task in their Workday inbox

## Complete To Do

### Update Vacation Balances for Employee Actions

48 second(s) ago - Effective 2020-05-20

For [Redacted]

Overall Process Start Additional Job: Test Employee

Overall Status Successfully Completed

Due Date 2020-05-28

Instructions When needed, please update the employee's absence balances to accurately reflect their change in entitlement.

Use the below link to navigate to the employee's balances, select the relevant vacation plan, and override the front-loaded balance (as of 1st Jan) with the new calculated amount.

Once completed, please ensure to return to this screen, and click **Submit** below to continue this overall process.

Maintain Accrual and Time Off Ad...

Click 'Maintain Accrual...' link

Click on the **Maintain Accruals and Time off Adjustments** button to initiate this BP

# MAINTAIN ACCRUALS AND TIME OFF ADJUSTMENTS

**1** Initiate the task

**B** As a Standalone Task...

Enter "Maintain Accrual and Time Off Adjustments/Overrides" in the Search Bar

Click "Maintain Accrual and Time Off Adjustments/Overrides" task

Welcome, On behalf of:

Or

Navigate to the employee's profile. Click Actions > Time and Leave > Maintain Accruals and Time Off Adjustments/Override.

# MAINTAIN ACCRUALS AND TIME OFF ADJUSTMENTS

2

Make the Adjustment

The next window has a required **Worker** field. Select the employee's name and click **OK**.

## Maintain Accrual and Time Off Adjustments/Overrides

Worker \*

Select Worker

The vacation balance must be updated for the applicable position. Click on the **Adjustments** tab and enter the applicable information.

## ← Maintain Accrual and Time Off Adjustments/Overrides

Worker

Adjustments

Overrides

Automated Adjustments

# MAINTAIN ACCRUALS AND TIME OFF ADJUSTMENTS

2

Make the Adjustment

← Maintain Accrual and Time Off Adjustments/Overrides

Worker [Redacted]

Adjustments Overrides Automated Adjustments

Adjustments 1 item

*Select Accrual/Time Off	Units	Unit of Time	*Period	*Reference Date	Position	Batch ID	Comment
<input type="text" value="Vacation - Adjustment Management &amp; Professionals Accrual"/>	<input type="text" value="10"/>	Hours	<input type="text" value="2020-01-01 - 2020-12-31 (Annual)"/>	<input type="text" value="2020-01-01"/>	<input type="text" value="Education Coordinator"/>	<input type="text"/>	<input type="text"/>

Reference Date: This will default from the period selected

**Select Accrual/Time Off:**  
Select the vacation category for the appropriate employment group

**Units:** Enter the amount to be added or deducted from the vacation balances (if deducting, enter the – sign before the number, e.g. - 10)

**Period:**  
Select the year pertaining to the adjustment

**Position:**  
Select the employee's position the adjustment is for

**Comments:**  
Enter a comment explaining the adjustment

# MAINTAIN ACCRUALS AND TIME OFF ADJUSTMENTS

2

Make the Adjustment

If this is being completed as a standalone task, there are no further steps/approvals required.

If this is a sub-process task, navigate back to your inbox, open the To Do item and click **Submit**.

## Complete To Do

### Update Vacation Balances for Employee Actions

48 second(s) ago - Effective 2020-05-20

For Media Specialist (TPT)-6

Overall Process Start Additional Job: Test Employee

Overall Status Successfully Completed

Due Date 2020-05-28

Instructions When needed, please update the employee's absence balances to accurately reflect their change in entitlement.

Use the below link to navigate to the employee's balances, select the relevant vacation plan, and override the front-loaded balance (as of 1st January) with their new calculated amount.

Once completed, please ensure to return to this screen, and click **Submit** below to continue this overall process.

Maintain Accrual and Time Off Ad...

Click Submit

Submit

Save for Later

Close

# MAINTAIN ACCRUALS AND TIME OFF ADJUSTMENTS

## 3 How to Skip This Step (When Applicable)

Although this BP will appear as a sub-process to all Job Change BPs, it is not always required. [Refer back to slide 10](#) to review instances where this task is not required.

**Complete To Do**  
**Update Vacation Balances for Employee** Actions  
20 day(s) ago - Due 2020-05-28; Effective 2021-01-01

**For** Department of MySpace (Morgan MySpace)

**Overall Process** Data Change: Ali Admin

**Overall Status** Successfully Completed

**Due Date** 2020-05-20

**Instructions** When needed, please update the employee's absence balances to accurately reflect their change in entitlement.  
Use the below link to navigate to the employee's balances, select the relevant vacation plan, and override the front-loaded balance (as of 1st January) with their new calculated amount.  
Once completed, please ensure to return to this screen, and click **Submit** below to continue this overall process.

Maintain Accrual and Time Off Ad...

**Skip This Task**  
4 minute(s) ago - Due 2020-05-15; Effective 2020-05-12

You have opted to Skip this Task. The Task will have a status of "Manually Skipped" in Process History. Please enter any optional reason for this action. Your reason comments will also be available in Process History.

**Business Process** Lateral Move

**Step** To Do: Update Vacation Balances for Employee

**Due Date** 2020-05-15

**Skip Reason** Not applicable

Enter Reason

OK



**Next Workday Wednesday: March 2<sup>nd</sup> | 10:00 – 11:00am**

**Topic: HR and Finance Q+A**

[Registration link](#)

