

Use this task to review employee leave balances in UCPath.

Navigation: PeopleSoft Homepage > Absence Administration > Manage Accruals/Balances > Admin - Review Absence Balance

Note: This page also may be available in Workcenter depending on your security access.

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Step	Action
1.	This simulation reviews a variety of leave accrual examples.
	This first example is a staff employee with vacation and sick leave accruals.
2.	Click in the <b>Empl ID</b> field.
3.	Enter the desired information into the <b>Empl ID</b> field. For this example, enter <b>10203351</b>
4.	Click the <b>Search</b> button.
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Step	Action
5.	The <b>Admin - Review Absence Balance</b> page displays the leave accrual balances for the most recent period. In this example, the date is 04/30/2024.
6.	You can change the leave accrual balance period by changing the <b>As of Date</b> . Click the <b>Look up As of Date</b> button.



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Step	Action
7.	UCPath displays leave accrual periods for the employee. Select the appropriate date.
	For this example, click the <b>01/31/2024</b> list item.



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Step	Action
8.	UCPath displays the leave accrual balances as of 01/31/2024.
	Review the Current Balance section.
9.	The <b>Leave</b> column displays the employee's leave accrual types for the period. This employee has <b>Vacation</b> and <b>Sick</b> leave accrual types.
	If an employee uses designated protected sick leave, these hours will show in a separate row. In this example, the employee has not reported protected sick leave.
10.	<b>Employment Service Months</b> shows the employee's months of service for leave accrual tier purposes. <b>Employment Service Months</b> do <u>not</u> correspond to service credit for retirement purposes.
11.	The <b>Beginning Balance</b> column displays the leave accrual balances at the start of the selected period.
12.	The <b>Taken</b> column displays the leave accrual taken during the period.
13.	The <b>Earned</b> column displays the leave accrual earned during the period.
	If an employee had any worker's compensation or compensatory time off (CTO) adjustments completed on their behalf, these hours would be credited to them in the <b>Earned</b> column.
14.	The Adjustments column displays the leave accruals adjusted during the period.
	The <b>Adjustments</b> column is also used to initially store leave hours converted into UCPath.



Step	Action
15.	The <b>Ending Balance</b> column displays the leave accrual balances at the end of the selected period.
16.	The Accrual Max column displays the maximum leave accrual for the leave accrual type.

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Step	Action
17.	The <b>Accrual For Pay Period By Appointment</b> section displays the leave accrual factors for each of the employee's appointments (UC jobs).
18.	Each row in this section represents an appointment in the selected period. This employee has one row, so this employee has one UC appointment during this the period.
19.	The <b>Pay Period Hours</b> column displays the hours for each appointment in the period that are eligible for leave accruals.
20.	Multiply the <b>Pay Period Hours</b> by the <b>Vacation Factor</b> to determine the <b>Vacation Accrued</b> for the period. In this example, 184 x .069231 equals 12.738504. Multiply the <b>Pay Period Hours</b> by the <b>Sick Factor</b> to determine the <b>Sick Accrued</b> for the period.
	The <b>Sick Accrued</b> and <b>Vacation Accrued</b> results are rounded up and appear in the <b>Earned</b> column in the <b>Current Balance</b> section.



Step	Action
21.	Review the disclaimers in each section on this page. Balances reflect what has been processed to date for the selected <b>As of Date</b> .
	Note that FMLA, CFRA and/or PDLL balances appear on this page when the employee is on a paid or intermittent FMLA, CFRA and/or PDLL leave.
22.	Return to the most recent period for this employee.
	Click the Look up As of Date button.

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Step	Action
23.	Select the appropriate date.
	For this example, click the <b>04/30/2024</b> list item.



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Step	Action
24.	UCPath displays the balances as of 04/30/2024.
	Now review another leave accrual example.
25.	Click the <b>Return to Search</b> button.



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26.	Click the <b>Clear</b> button.
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Step	Action
27.	The next example shows an employee who is eligible for <b>Sabbatical Leave</b> accruals.
28.	Click in the <b>Empl ID</b> field.
29.	Enter the desired information into the <b>Empl ID</b> field. For this example, enter <b>10006514</b> .

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Step	Action
31.	The <b>Admin - Review Absence Balance</b> page displays Melissa's leave accrual balances as of 06/30/2023.
32.	The <b>Current Balance</b> section includes <b>Sabbatical Leave</b> credit as well as <b>Employment Service Months</b> .
33.	The <b>0</b> in the <b>Earned</b> column seems to indicate that the employee has not earned any sabbatical credits for the period. Sabbatical credits do not appear on this page until the credits are a whole number.
34.	<ul> <li>Note: Eligible academic appointees with a paid appointment of at least thirty calendar days in a calendar year will receive a sick leave bank of six (6) days and can be used according to APM policy.</li> <li>Academic banks are managed locally and do not currently appear in UCPath.</li> </ul>
35.	A new bank of paid sick leave will become available on January 1 of each year. The bank of unused paid sick leave days will expire on December 31 of each year or the last date of appointment if the appointment ends before December 31.
36.	Click the <b>Return to Search</b> button.
37.	Click the Clear button.



Step	Action
38.	Now review another absence balance example: leave balances for a per diem employee. Click in the <b>Empl ID</b> field.
39.	Enter the desired information into the <b>Empl ID</b> field. For this example, enter <b>10047213</b>
40.	Click the <b>Search</b> button.

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Step	Action
41.	The Admin - Review Absence Balance page displays Ivette's leave accrual balances as of 09/14/2024.



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Step	Action
42.	Per Diem employees receive 8 hours of paid sick leave per calendar year, with the new allotment provided each January 1. They may carry over unused sick leave from the previous year, however they cannot carry more than 16 hours at any time. For new Per Diem hires, the paid sick leave will be credited and available for use on the next working day following the employee's first monthly or quadriweekly pay cycle.



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Step	Action
43.	<b>Note:</b> The <b>Protected Hours Used</b> row will appear when and employee uses sick leave hours designated as protected. The total number of protected sick leave hours used will appear in the <b>Ending Balance</b> column.
44.	Click the <b>Return to Search</b> button.
45.	Click the <b>Clear</b> button.
46.	Now review another leave accrual example: accruals for a Post Doctoral employee. Click in the <b>Empl ID</b> field.
47.	Enter the desired information into the <b>Empl ID</b> field. For this example, enter <b>10004045</b>
48.	Click the Search button.



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Step	Action
49.	The <b>Admin - Review Absence Balance</b> page displays Ursula's leave accrual balances as of 09/30/2024.
50.	The <b>Current Balance</b> section displays <b>Post Doc PTO</b> and <b>Post Doc Sick</b> leave accrual balances.
51.	<b>Post Doc PTO</b> and <b>Post Doc Sick</b> leave accruals are front-loaded (awarded) to the employee for the entire anniversary year at the <u>start</u> of each anniversary year. This means that Post Doc employees do <u>not earn</u> leave hours on a monthly or on a quadri-cycle.
	The front-load leave accrual amount is prorated for the anniversary year based on the employee's <b>Expected End Date</b> on the <b>Job Data</b> page. Unused <b>Post Doc PTO</b> does <u>not</u> carry over to the next accrual year. Unused <b>Post Doc Sick</b> <u>does</u> carry over to the next accrual year.
52.	Click the <b>Return to Search</b> button.



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Step	Action
53.	Click the <b>Clear</b> button.
54.	Now review another leave accrual example: an employee who is reaching the leave accrual maximum. Enter the desired information into the <b>Empl ID</b> field. For this example, enter <b>10007049</b> .
55.	Click the <b>Search</b> button.



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Step	Action					
56.	UCPath displays Nicole's leave accrual balances as of 09/30/2024.					
57.	Note that there is an additional column in the <b>Current Balance</b> section. The <b>Approaching Max</b> column appears when an employee is approaching or has reached the leave accrual maximum for a leave accrual type. In this example, the <b>Y</b> on the second row indicates the employee will soon reach the <b>Vacation</b> accrual maximum.					
58.	Click the <b>Return to Search</b> button.					



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Step	Action
59.	Click the <b>Clear</b> button.
	Clear
60.	Now look at another example: an employee who has no leave accrual balances.
	Enter the desired information into the <b>Empl ID</b> field. For this example, enter <b>10006511</b> .
61.	Click the <b>Search</b> button.
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Step	Action
62.	The Admin - Review Absence Balance page appears for Yuanlin Konrad. Notice that the text in red font states that there are no absence balances for Yuanlin for the selected period. Remember that changing the As of Date may display balances for other periods.
63.	Click the <b>Return to Search</b> button.



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Step	Action
64.	Click the <b>Clear</b> button.
65.	You have reviewed leave accrual balances for multiple employees. <b>End of Procedure.</b>