



# **Employee Leave Balance Inquiry Guide**

*Payroll Services*

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PeopleSoft Version 9.0

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## 1.0 Accessing Employee Balance Inquiry Page

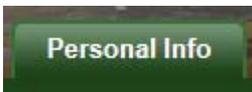
Employees access their leave balances using Self-Service>Employee Balance Inquiry in PeopleSoft. A direct link to this page has been provided on the “Personal Info” tab of the My Cal Poly Portal. To navigate there, please follow these steps:

1. Open a web browser (Internet Explorer, Firefox, etc.) and type [my.calpoly.edu](http://my.calpoly.edu)



The screenshot shows the login page for the my.calpoly.edu portal. At the top, there is a navigation bar with "Login" and "Cal Poly Directory Information" tabs. Below this is a green banner that says "Welcome to the my.calpoly.edu portal!". The main content area is titled "Login" and contains a message: "The resource you requested requires you to log in with your Cal Poly User Name ('jdoe@calpoly.edu') and Password." Below the message are two input fields: "Cal Poly User Name:" and "Password:". A "Login" button is located at the bottom left of the form.

2. Enter your Cal Poly user name and password
3. Navigate to the “Personal Info” tab



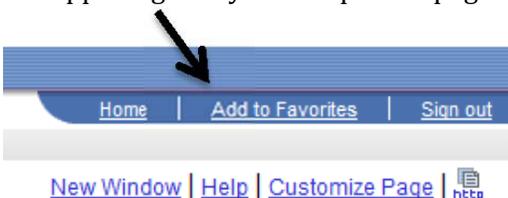
4. On the “Personal Information Portlet” you will find your employee and personal information. Your leave balance inquiry page is accessed by clicking on “View” next to Leave Balance:



5. You are now logged into PeopleSoft at the following navigation:



**Alternatively**, if you were already in PeopleSoft HR & Student Administration, you can access the same page by navigating to Main Menu>Self Service>Time Reporting>Employee Balance Inquiry. It is suggested you create a favorite to this navigation if you will be accessing this page in this manner. On the upper right of your PeopleSoft page click on “Add to Favorites”:



## 2.0 Reviewing Employee Balance Inquiry Page

The **Employee Balance Inquiry page** is designed to show your absence and state service balances on the first page. These top level balances do not include current month takes, adjustments or accruals. Please take note of the “Balances as of Date” to determine what period these balances are available for. When the “Details” icon is clicked, a second page will show historic information from prior finalized periods. See Section 3.0 for more information on this details page.

Three tabs are visible at page opening: **Absence Balances** (default tab showing), **Compensatory Time** and **State Service for Absence**. All three tabs contain Name, Payroll Status, EmplID, Empl Rcd Nbr, Department, Union Code, Last Finalized Period, Balances as of Date and a Details link.

You can also view *all balances* at once by clicking on “show all columns”:

Last Finalized Balances												
Absence Balances   Compensatory Time   State Service for Absence												
Name	Payroll Status	EmplID	Empl Rcd Nbr	Department	Union Code	Last Finalized Period	Balances as of Date	Sick Balance	Vacation Balance	Personal Holiday Available	Details	
1	Absence, Abby	Active	999999999	0	503300	R09	2012-01	02/01/2012	137.500	217.756	1	

[Graduated Vacation Chart](#)

From this page the “Graduated Vacation Chart” is available which provides details on vacation/CTO accruals and maximums:

Press Esc to Return

SUMMARY OF VACATION ACCRUAL RATES		
SERVICE REQUIREMENTS*	MONTHLY VACATION ACCRUAL RATE	DAYS ACCRUED PER YEAR
0-3 YEARS: 1 TO 36 MONTHS	6 2/3 HOURS	10
3-6 YEARS: 37 TO 72 MONTHS	10 HOURS	15
6-10 YEARS: 73 TO 120 MONTHS	11 1/3 HOURS	17
10-15 YEARS: 121 TO 180 MONTHS	12 2/3 HOURS	19
15-20 YEARS: 181 TO 240 MONTHS	14 HOURS	21
20-25 YEARS: 241 TO 300 MONTHS	15 1/3 HOURS	23
OVER 25 YEARS: 301 MONTHS AND UP	16 HOURS	24
VACATION ACCRUAL RATES FOR ELIGIBLE CLASSIFICATIONS IN		
EXECUTIVE (M96), MANAGEMENT (M80), CONFIDENTIAL (C99), FACULTY (Unit 3) AND ACADEMIC STUDENT (UNIT 11)	16	24

\*In terms of full-time service

SUMMARY OF MAXIMUM VACATION AND C TO CREDITS				
BARGAINING UNIT OR CLASSIFICATION	ANNUAL CTO MAX*	FLSA ANNUAL CTO MAX**	MAX VACATION: LESS THAN 10 YEARS OF SERVICE	MAX VACATION: MORE THAN 10 YEARS OF SERVICE
M96	N/A	N/A	480 HOURS	480 HOURS
M80	N/A	N/A	384 HOURS	440 HOURS
UNIT 1	N/A	N/A	272 HOURS	384 HOURS
UNIT 2	120 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 3	N/A	N/A	320 HOURS	440 HOURS
UNIT 4	120 HOURS	240 HOURS	320 HOURS	440 HOURS
UNIT 5	120 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 6	240 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 7	120 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 8	200 HOURS***	480 HOURS	272 HOURS	384 HOURS
UNIT 9	120 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 10	240 HOURS	240 HOURS	272 HOURS	384 HOURS
UNIT 11	N/A	N/A	80 HOURS	80 HOURS
UNIT 12	N/A	N/A	272 HOURS	440 HOURS
E99	120 HOURS	240 HOURS	272 HOURS	384 HOURS
C99	120 HOURS	240 HOURS	384 HOURS	384 HOURS

\*PER MOU/Policy

\*\*PURSUANT TO FAIR LABOR STANDARDS ACT

This screen shot is effective as of the date of this guide being written. The most up to date chart will be available through the PeopleSoft link. Press **Esc** to return to the **Employee Balance Inquiry Page**.

### 3.0 Reviewing Absence Balance Details

From the Employee Balance Inquiry page, the details link may be clicked (from any tab) to display *current* as well as *historical* Absence Balance Details. Accruals for the current month (such as sick, vacation, etc.) will not show on the Absence Balance Details page until the current calendar is finalized. You will, however, see earned accruals such as ADO and CTO prior to finalizing the calendar.

Last Finalized Balances											
Absence Balances		Compensatory Time		State Service for Absence							
Name	Payroll Status	EmplID	Empl Rcd Nbr	Department	Union Code	Last Finalized Period	Balances as of Date	Sick Balance	Vacation Balance	Personal Holiday Available	Details
1 Absence, Abby	Active	999999999	0	503300	R09	2012-01	02/01/2012	137.500	217.756	1	

[Graduated Vacation Chart](#)

Upon pressing the “**Details**” link , on any of the three tabs, the Absence Balance Details page will be displayed.

Absence Balance Details									
EmplID: 999999999			Empl Rcd#: 0		Last Period Finalized: 2012-01				
Department: 503300			Union Code: R09		Payroll Status: Active				
All Absence Balances <span style="float: right;">Customize   View All   First 1-13 of 51   Last</span>									
Sick	Vacation	Personal Holiday	CTO	Holiday Credit	Holiday CTO	Excess	ADO	Non Exp ADO	State Service
Period ID	Balances as of Date		Previous Sick Balance	Sick Earned	Sick Taken	Sick Adjusted	Catastrophic Sick Donated	Sick Balance	
1	2012-02	CURRENT - Not Finalized		137.500	0.000	0.000	0.000	0.000	137.500
2	2012-01	02/01/2012		129.500	8.000	0.000	0.000	0.000	137.500
3	2011-12	01/01/2012		122.500	8.000	1.000	0.000	0.000	129.500
4	2011-11	12/01/2011		122.500	8.000	8.000	0.000	0.000	122.500
5	2011-10	11/01/2011		122.500	8.000	8.000	0.000	0.000	122.500
6	2011-09	10/01/2011		114.500	8.000	0.000	0.000	0.000	122.500
7	2011-08	09/01/2011		109.500	8.000	3.000	0.000	0.000	114.500
8	2011-07	08/02/2011		103.000	8.000	1.500	0.000	0.000	109.500
9	2011-06	07/01/2011		99.000	8.000	4.000	0.000	0.000	103.000
10	2011-05	06/01/2011		94.000	8.000	3.000	0.000	0.000	99.000
11	2011-04	05/01/2011		86.000	8.000	0.000	0.000	0.000	94.000
12	2011-03	04/01/2011		78.000	8.000	0.000	0.000	0.000	86.000
13	2011-02	03/02/2011		70.000	8.000	0.000	0.000	0.000	78.000

[Return](#)

All balance tabs will be retrieved in one pass to improve performance and to reduce navigation back and forth. You may need to use the right arrow to view all balance type tabs:

All Absence Balances										
Customize   View All   First 1-13 of 51   Last										
Sick	Vacation	Personal Holiday	CTO	Holiday Credit	Holiday CTO	Excess	ADO	Non Exp ADO	State Service	

Once pressed you reveal more balance tabs. To navigate back, press the left arrow:



**Other options available on this page:**

To view all rows of detail for each balance type, click “View All”:



To view all rows of detail for each balance type in a separate window, click “Zoom”:



To download results for each balance type into an Excel spreadsheet, click “Download”:



**\*Note:** You may need to hold down Ctrl + click “Download” button, in order to override a pop-up blocker

To return to the Employee Balance Inquiry page (top level) click on the “Return” button:



“Customize” is available on this page, however any customizations may get wiped out during upgrades:



If you have any questions on your balances or how to navigate through these pages, please contact your [Payroll Technician](#) or call the Payroll Services office at 756-2605.