CAL POLY
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Timekeeper/Manager Leave Balance Inquiry Guide

Payroll Services

PeopleSoft Version 9.0

Lori Serna - May, 2012

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1.0   Accessing CMS Links>Group Leave Balance Inquiry

Timekeepers and Managers access their group leave balances in PeopleSoft by navigating to:

Main>Manager Self Service>Time Management>Timekeeper Balance Inquiry

A direct link to this page has been provided on the "CMS Links" Portlet on 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

2. Enter your Cal Poly user name and password
3. Navigate to Main tab, under "CMS Links" and click on "Group Leave Balance Inquiry":

4. You are now logged into PeopleSoft on the Timekeeper Balance Inquiry page.

Alternate Navigation: If you are already in PeopleSoft HR & Student Administration, you can access the same page by navigating to Main Menu>Manager Self Service>Time Management>Timekeeper Balance Inquiry. The only difference is the customized wrapper Payroll Services publishes does not appear at the top of the screen. 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 Timekeeper Balance Inquiry Page

Please Note: The page is titled "Timekeeper" but you *may* be a manager using this page. There are two different group balance inquiry pages delivered in PeopleSoft 9.0: Timekeeper and Manager. Until our campus has implemented more self-service entry and approval pages, we are using the "Timekeeper" page for the broader access. You may be changed to "Manager Balance Inquiry" if appropriate at a later time.

The **Timekeeper Balance Inquiry page** is designed to show employee absence and state service balances using dynamic group security. Once logged in, you will be brought to this page:

Refresh Employee List: The first time you access this page, you will be required to "Refresh Employee List" prior to executing any searches. The search button itself will not populate until this has been done. This process was implemented to greatly improve the performance of this page. Building an "Employee List" allows you to execute your searches on a static "list" of employees you have security to view. In prior versions, you were creating that list every time you hit "search", greatly increasing the time it took to return results.

Search Criteria: New functionality has been added to this page to further refine the results based on any combination of search criteria, not just Department or EmplID. See **Appendix A** for more details on each search criteria type.

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 balance totals* at once by clicking on "show all columns":

On this page, a link to the "Graduated Vacation Chart" is available which provides details on vacation and CTO accruals and maximums:

	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

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 (M98), 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 CTO 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
M98	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 summary chart will be available through the link on the Timekeeper Balance Inquiry page. This link is also accessible for employees on the Employee Balance Inquiry page. To return to the Timekeeper Balance Inquiry page, press **Esc**.

	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

When reviewing balance totals for employees at this level, it is important to note the **Balances as of Date** column viewable on each of the tabs. That date represents when these balances are available for. For instance, in the above example the "Balance as of Date" is 02/01/2012; so the balances shown are available to use as of 02/01/2012. The **Last Finalized Period** is also now included. In the above example, these balances reflect that the month of January has been "finalized" or closed. These balances include all takes, adjustments and accruals from January for use as of 02/01/2012.

3.0   Reviewing Absence Balance Details

From the Timekeeper Balance Inquiry page, the details link may be clicked (from any tab) to display the Absence Balance Details page. This page displays *current* as well as *historical* absence balance details for all leave types the employee may qualify for or retain.

	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		

Graduated Vacation Chart

Absence Balance Details

EmplID:	Empl Rcd#: 0	Last Period Finalized:	2012-01
Department:	Union Code: R09	Payroll Status:	Active

▽ 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

	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

New "CURRENT-Not Finalized" – information on this top row displays what is in progress for the current processing month. You will see pending takes, adjustments and donations. Leave entitlements (such as sick, vacation, PH) will not show as earned on the CURRENT-Not Finalized row until that calendar is "finalized" or closed. You will, however, be able to see *earned leave* such as ADO, Holiday Credit and CTO prior to the calendar being finalized.

For some employees, 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 ▷

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 Timekeeper Balance Inquiry page (top level) click on the "Return" button:
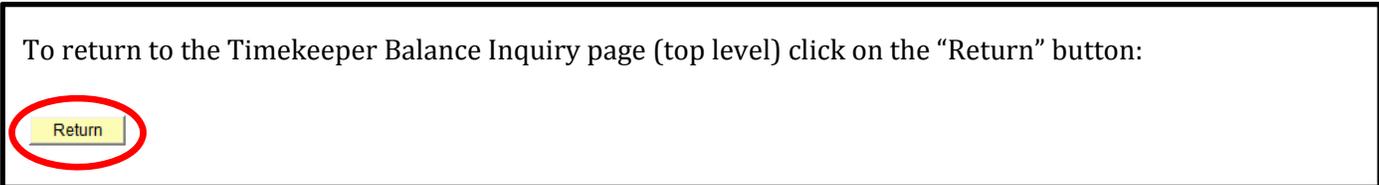
If you have any questions on employee balances or how to navigate through these pages, please contact your Payroll Technician or call the Payroll Services office at 756-2605.

4.0   Appendix A

Search Criteria: New functionality has been added to the Timekeeper Balance Inquiry page to further refine the results based on any combination of search criteria, not just Department or Employee ID. The following list provides more details on each available search criteria and the values available to search by:

- **Department ID** – the six-digit department identifier the employee is assigned to. You can use the hourglass button to display a list of department IDs that you have security to view.

- **EmplID** – employee's nine-digit PeopleSoft identifier. You can use the hourglass button to display a list of employee ID's you have security to view. Caution – this can be a very large search depending on how many employees you have access to. Suggestion: search by name or department ID if you do not have the EmplID.

- **Name** – order of "last name, first name". Enter all or any portion of.

- **Empl Rcd#** - employee record number. If employee is populated, you can enter a record number to further refine the search if employee has more than one record.

- **Pay Group**: this information is captured in PeopleSoft to define which payroll group the employee is enrolled in.

    o   ACD – Academic Employees (Faculty, Librarians, Coaches)

    o   MST – Master Payroll Employees (Salaried Staff and Managers)

    o   POS – Positive Payroll Employees (Hourly or Intermittent)

- **Payroll Status :** this is the employee's payroll status in PeopleSoft ; most commonly used are:

    o   Active

    o   Leave

    o   Leave W/Pay

    o   Retired

    o   Terminated

    o   Work Break

- **HR Status**: this is the employee's job status in PeopleSoft

    o   Active

    o   Inactive

- **Union Code**: the employee's union affiliation or other classification

Union Code	Description
C99	Confidential
E99	Excluded
M80	Management Personnel Plan
M98	Executive
R01	Union of Amer Physic/Dentists
R02	Cal St Univ EE Union - Health
R03	California Faculty Association
R04	Academic Professionals of Cal
R05	Cal St Univ EE Union-Ops/Svcs
R06	State Employee's Trade Council
R07	Cal St Univ EE Union-Clerical
R08	State University Police Assn
R09	Cal St Univ EE Union - Tech
R10	Internat'l Union of Oper Eng
R11	Cal Alliance Acad Stu Workers