Employee
Leave Balance Inquiry
Guide

Payroll Services

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

![Login](image)

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

![Personal Info](image)

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:

![Leave Balance](image)

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

![Navigation](image)

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”:

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

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.

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

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:

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.