Syssero® Solution Packet

Adjust Employee Time-Off Balance

Solution Overview

In some circumstances, you'll find yourself needing to adjust Time-Off balances for an employee. This is typically required in cases where:

- An employee receives discretionary additional time off
- A company has a PTO donation policy
- Time off policies are improperly configured at the beginning
- Or other special circumstances

In this example, the employee was given additional time off due to improper time off being set up for their job level, which warranted a manual time-off adjustment.

Impacted Functional Areas

- **Absence Management**

Step 1: Access the Employee's Profile

First, navigate to the employee's profile. Then click "Actions" -> "Time and Leave" -> "Maintain Accrual and Time Off Adjustments/Overrides."

Step 2: Make the Adjustment

Follow these steps:

- Click the "+" icon under the Adjustments Tab. Select the appropriate Time Off Type that needs to be adjusted.
- To reduce hours, type in the amount under Units.
- To add hours, put a minus ("-") sign before the amount.
- Select the last completed period from "All Periods." The Reference Date can be any date within the selected Period (you can leave it at the default)

Step 3: Confirm the Adjustment

Click "OK., then head over to the Time Off Balance to verify that the totals have been updated by the desired amount.

Before & After

Before

After

When making these adjustments be sure to look at the employee's PTO balances before and after the manual adjustment to ensure accuracy. Otherwise you may inadvertently be giving more or less time off than you intended to.

If doing this as a correction to a plan that's not set up correctly, make sure to check the eligibility requirements for this time off plan in your tenant and ensure they are in alignment with your PTO policy. Otherwise, you're good to go. For help or more info, reach out to info@syssero.com