



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."

The screenshot shows a software interface with a blue sidebar on the left containing various menu items. The 'Time and Leave' menu item is highlighted. A dropdown menu is open from the 'Actions' button, showing a list of options. The option 'Maintain Accrual and Time Off Adjustments/Overrides' is highlighted with a red box. In the background, a table titled 'Balances Tracked in Hours' is visible, showing columns for Beginning Balance, Accrued in Period, Absence Paid in Period, Carryover Forfeited in Period, and Balance As Of Date. The table contains two rows of data and a total row.

Beginning Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Balance As Of Date
24	0	0	0	24
40	0	0	0	40
				Total: 64



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)

Maintain Accrual and Time Off Adjustments/Overrides

Worker

Adjustments Overrides

Adjustments 1 item

	*Select Accrual/Time Off	Units	Unit of Time	*Period	*Reference Date	Batch ID	Comment
	Vacation Time Off	-8		All Periods			

Maintain Accrual and Time Off Adjustments/Overrides

Worker

Adjustments Overrides

Adjustments 1 item

	*Select Accrual/Time Off	Units	Unit of Time	*Period	*Reference Date	Batch ID	Comment
	Vacation Time Off	-8	Hours	06/25/2023 - 07/01/2023 (Madix Weekly)	06/25/2023		

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

Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Balance As Of Date	Balance As of Date (Includes Events Awaiting Approval)	As of Period
Small Necessities Leave	Hours	0	24	0	24	0	0	0	24	24	07/02/2023 - 07/08/2023 (Weekly)
Vacation	Hours	48	0	8	40	0	0	0	40	40	07/02/2023 - 07/08/2023 (Weekly)
Total									64	64	

After

Absence Plan	Unit of Time	Beginning Year Balance	Accrued Year To Date	Absence Paid Year To Date	Beginning Period Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Balance As Of Date	Balance As of Date (Includes Events Awaiting Approval)	As of Period
Small Necessities Leave	Hours	0	24	0	24	0	0	0	24	24	07/02/2023 - 07/08/2023 (Weekly)
Vacation	Hours	48	0	0	48	0	0	0	48	48	07/02/2023 - 07/08/2023 (Weekly)
Total									72	72	

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