

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."

Lead Person Working			Balances Tracked in Hours 2 items							
		Actions	Worker		eginning Balance	Accrued in Period	Absence Paid in Period	Carryover Forfeited in Period	Balance As Of Date	
		Frequently Used			24	0	0	0	24	
88	Summa	Start Brown	View Team Contact		40	0			10	
	Job	Start Proxy	Work Address		40	0	0	0	40	
	Compe	Enter Time	0	United States of America					Total: 64	
	Repefit	View Time Clock History	Enter Time						10tan. 04	
-		view Security Groups	Enter Absence	Enter Absence						
	Time 0	Benefits	> Correct Absence							
G	Pay	Business Asset	> View Time Off							
	Contac	Business Process	> View Schedule for Worker							
٨	Person	Calendar	> Add Time Clock Event							
n	Perform	Compensation	> View Time Clock History							
		Job Change	View Time Off Balance							
0	Career	Manage Work	View Time Off Results by Period View Calculated and Override Balances							
☆	Feedba	Organization	> View Carryover Balances							
		Payment	> View Leave Results							
		Payroll	> Adjust Colculated Time							
		Payroll Interface	Maintain Accrual and Time Off Adjustments/Overrides							
		Personal Data	> Maintain Accrual and Lime UT Limit Overnoes							
		Provisioning Groups	Maintain Time Off Plan Carryover Overrides							
		Recruiting	Maintain Time Off Plan Override Balances Time Off Pacalculate Balance Process							
		Safety Incident	> Recalculate Worker Time Off Balance							
		Scheduling	> Manage Absence Cases							
		Talent	Assign Work Schedule							
		Time and Leave	Schedule History for Worker							
		- Inv Account	>							



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					$\equiv \Box r_{2}$
\oplus	*Select Accrual/Time Off	Units	*Period	*Reference Date	Batch ID	Comment
Θ	X Vacation Time Off	-8	Search 📃	MM/DD/YYYY	=	
			All Periods >]		

Maintain Accrual and Time Off Adjustments/Overrides

Worker												
Adjustments	Overrides											
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+	*Select Accrual/Time Off	Units Unit of T	of Time *Period	*Reference Date	Batch ID	Comment						
Θ	\times Vacation Time Off \hdots	-B Hours	⁸	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

	- ∞	Time Off and Leave Requests	Time Off Bal	ance									
	Lead Person Working	Balances Tracked in Hours 21	tems	_									:
	Actions	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
	Team	Small Necessities Leave	Hours	0	24	0	24	0	0	0	24	24	07/02/2023 - 07/08/2023 (
88	Summary	Manatian	House							0	40		03/03/2022 - 02/02/2022 0
	Job	Vacation	nours	40				, v	, v			Ň	Weekly)
	Compensation									<u>Г</u>	Total 64	64	
◙	Benefits									L	\sim	A	
ê	Time Off												

After

	● 密	Time Off and Leave Requests	Time Off Bal	iance									
	Lead Person Working	Balances Tracked in Hours 21	tems										🗐 🖩 🔻 ob 🖬 🗗 📰 🛄
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		Small Necessities Leave	Hours	0	24	0	24	0	0	Ū	24	24	07/02/2023 - 07/08/2023 Weekly)
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6	Job	Vacaoon	Hours	+0	v		*0	Ű	Ŭ	U	-		Weekty)
	Compensation									[Total 72	72	
0	Benefits											A	
ê	Time Off												

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 <u>info@syssero.com</u>