Review Accrual Balances

As well as the leave reports in Enterprise Analytics, Review Accrual Balances is an additional feature that can be used to access information on an employee's leave balances. The Review Accrual Balance screen updates once every pay period cycle. After payroll closes for a pay period, the system will apply accruals, as well as outstanding leave used entries and adjustments. The updated information typically appears on the Monday following a payroll close.

Use this instruction guide to

✓ Review an employee's accrued leave balances

Security Roles

You will need the following security role to perform the actions described in this guide

- UF_TL_DEPT_APPROVER
- UF_TL_DEPT_PROCESSOR

Navigation

1. Log on to myUFL (http://my.ufl.edu) using your GatorLink username and password

2. Navigate to **Benefits > Manage Leave Accruals > Review Accrual Balances**

3. Search for the employee by entering data in any of the search fields (i.e., last name)

4. If there is more than one employee record, you may be prompted to select the appropriate record

- (**Empl Rcd Nbr**)

The information is grouped by leave plan type that is available to the employee.

- Sick
- Vacation
- USPS Personal Holiday
- Faculty/TEAMS Personal Leave Days
- Special Compensatory Leave
- Regular Compensatory Leave
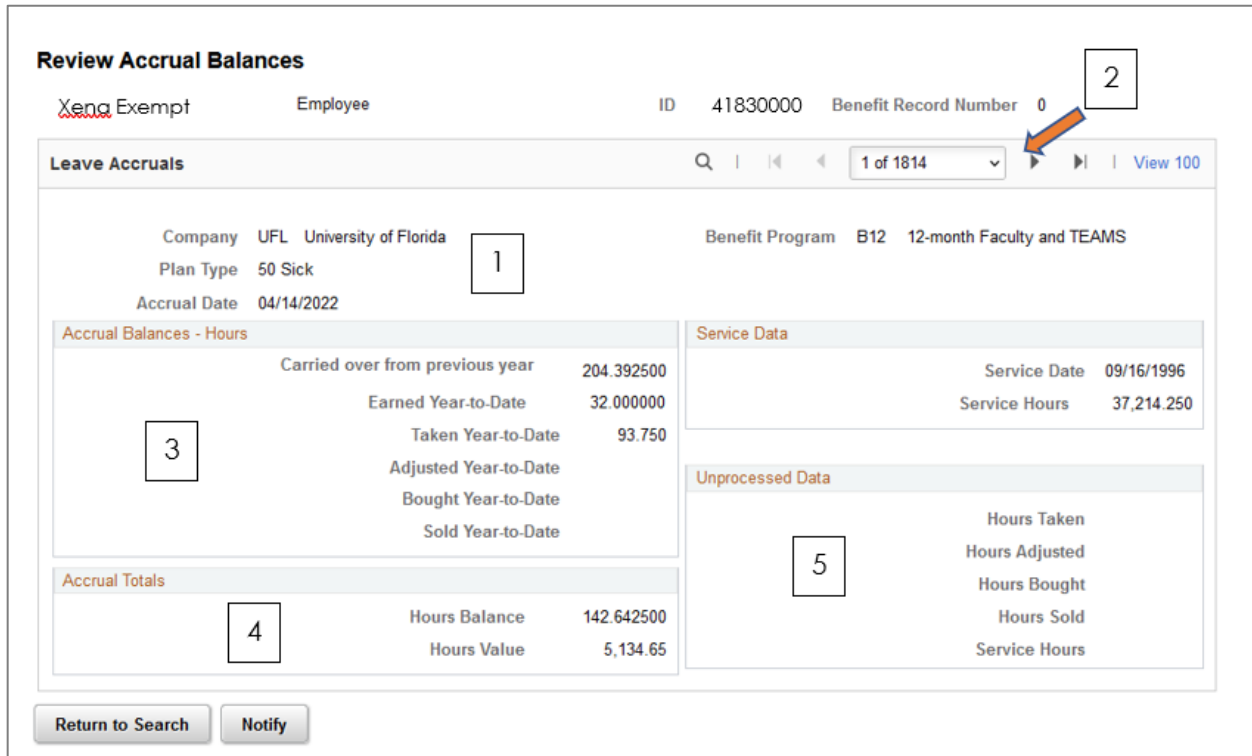- Overtime Compensatory Leave
- Sick Leave Pool

Figure 1

1
Reflects the leave plan type and specific accrual date (pay period end date).

2
Number of leave records for employee. Use navigation arrow to view one page at a time, View 100/View All to view all records on one continuous page. Use the magnifying lens icon [🔍], to enter a text string to find most recent record for specific leave plan (see **Figure 2** below), as follows:

Text String Leave Plan Type
Sic   Sick
Vac   Vacation
Hol   USPS Personal Holiday
Per   TEAMS/Faculty Personal Leave Days
OT   Overtime Comp Leave
Reg   Regular Comp Leave
SLP   Sick Leave Pool

|3|

Show leave balance accumulation based on calendar year.
Carried over from previous year reflects what the employee's balance was last calendar year.

Earned Year To Date reflects what the employee has earned so far in this calendar year.

Taken Year to Date reflect what the employee's balance was at the end of last calendar year; however, this accumulator does not start counting until we are in the first full pay period in the given calendar year. Leave taken during the pay period which crosses the calendar year is subtracted from the **Carried Over from previous year** number.

Adjusted Year to Date reflects the number of leave hours that were adjusted in the calendar year. It starts counting during the pay period that crosses the calendar year.

|4|

This reflects the employee's leave balance. The formula for the leave balance is:

Hours Balance = (Carried over from previous year) + (Earned Year to Date) – (Taken Year to Date) + (Adjusted Year to Date) + (*Unprocessed Hours Taken*) – (*Unprocessed Hours Adjusted*)

|5|

This section reflects the leave activity that happens in the following (immediate future) pay period. While the leave used will deduct from the balance in the current pay period, leave used in the following pay period waits here to be posted to the year-to-date accumulators in the following pay period ending row, which will not appear until the Monday following that pay period closing.

Figure 2

FOR ADDITIONAL ASSISTANCE

Payroll and Tax Services
352-392-1231
Payroll-Services@ufl.edu
http://www.fa.ufl.edu/departments/payroll-tax-services/

HRS Benefits
352-392-2477
central-leave@ufl.edu – for leave inquiries
http://hr.ufl.edu/benefits/leave/

Additional resources are available at the Time and Labor toolkit