

# Leave Type Balance Cap and Leave Details Improvements

APTA-1694 and APTA-2891

### Introduction

An additional field was added to the Leave Type set-up screen in Manage Leave. This field is the **Balance Cap** which will enable users to cap all balances to a particular maximum usually dictated by leave policy and ensure that employees will not be able to exceed the maximum balance available at any time throughout the fiscal year. In addition to this enhancement there has also been an improvement to the Leave Details screen. A **Requests** tab has been added.

#### Manage Leave

From the HR, Payroll & ESS > Manage Leave screen users will be able to go into each Leave Type and set a **Balance Cap** for each Leave Group within the type.

Edit Group Leave Type											
SICK/PERSONAL for 10 MO 3.2 HR											
Active: Active Enabled: Enabled											
General											
*Unit Type:	Hours	▼									
Approval Process:		<b>v</b>									
Include On Register:	Yes	<b>v</b>									
Calculate Hours From:	The Highest FTE Primary Job	<b>v</b>									
Accrual and Rollover											
Effective Date Range:	Current - Jul 1 2015 and later	Vew Delete									
Accrual Schedule:	Fiscal Year	Accrual Frequency: Beginning of Year									
Annual Total:	48.0000										
Balance Cap:		Add Schedule									
Rollover Cap:											
Roll Overflow Into:											
Incoming Overflow Can		Canada and a second									
Save Save and Add	Lreate Leave Accrual Records										

Figure 1: Edits to Balance Cap Can Be Made Within Each Leave Group

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If users choose to use the **Add Schedule** feature to set schedules of Accruals, Rollover Balances and Balance Caps, they will see the pop-up screen title has been renamed to the **Leave Eligibility Schedule**.

Leave I	Leave Eligibilty Schedule X										
				+ -	Add 🧪 Edit 💥 Delete						
Drag	a column header and drop	it here to group by that column									
	Years of Service From	Years of Service To	Annual Total	Balance Cap	Rollover Cap						
		items per page			No items to display						
Total red	cords selected : 0 <u>(Unselect A</u>	<u>41)</u>									
Close											

Figure 2: The New Leave Eligibility Schedule Pop-Up Screen

## **Leave Details**

From HR, Payroll & ESS > Leave Details users will now see two tabs. Requests are now being filtered into the **Requests** tab while all other details will be kept in the **Details** tab. Separation of these tabs was designed to speed up the population of information within the tabs as well as to simplify the search of information within each tab.

The **Requests** tab now houses all information regarding leave request transactions like Leave Type, date, status, who is next in line to approve and substitute assignment. In this tab the leave administrator can add leave records which will <u>post immediately</u> using the **+Add** button. This button was formerly labeled **+Request**.

Hom	Details Details View + Add														
	Search Q Leave Type: ALL * 4 Start Date: ALL * 4 End Date: ALL * 4 End Date: ALL * 4 Status: ALL * 4 Pending: ALL * 4 Requires Attention Of: ALL * 4 Employee Group Name: ALL * 4 Submitted On: ALL * 4														
	- F	Request	Employee Name	Leave Type	Start Date ↓	End Date	Units	Actual Amount	Status	Comment		Pending	Requires Attention Of	Substitute Employee	Employee Group
		102522	Long, John Z	SICK/PERSONAL	05/09/2023	05/09/2023	Hours	-6.0000	Approved	ut labore et dolore magna		No	$\smile$		Teacher
		102521	Long, John Z	SICK/PERSONAL	04/12/2023	04/12/2023	Hours	-6.0000	Approved	o eiusmod tempor incididunt ut l		No			Teacher
		102773	McDonald, Janet Z	SICK/PERSONAL	04/10/2023	04/11/2023	Hours	-12.0000	Approved	it amet, consectetur adi		No			Teacher
		102520	Long, John Z	SICK/PERSONAL	04/06/2023	04/06/2023	Hours	-6.0000	Approved	r adipisicing elit, sed d		No			Teacher
		102772	McDonald Janet Z	SICK/PERSONAL	03/30/2023	03/31/2023	Hours	-12 0000	Approved	sectetur adipisi		No			Teacher

Figure 3: New Requests Tab in Leave Details

The Employee Substitute Report can now be found by going to the **Requests** tab. Click the blue gear underneath the View and Add buttons to see the report option.



Figure 4: Employee Substitute Report Selection now Found In Requests Tab.

The **Details** tab is where all other details will be found. Details such as accrual transactions and creation of accrual transactions in addition to adjustment transactions and the creation of adjustment transactions will all be completed in this tab.

rfore > Leve > L													
Search Q Transaction Type: ALL * 4 Start Date: ALL * 4 Startus: ALL * 4 Leave Type: ALL * 4 Employee Group Name: ALL * 4 Created On: ALL * 4													
Transaction 1 Request Record Employee Name Leave Type Transaction Type Start Date Scheduled Amount Units Actual Amount Status Comment Employee Group													
	119361		Davis, Peggy Z	Vacation Yrs	Adjustment	11/10/2022	0.0000	Hours	1.0000	Posted		11 MO 8 HR- Longevity	A
	119360		Davis, Peggy Z	Vacation Yrs	Adjustment	11/10/2022	0.0000	Hours	-80.0000	Posted		11 MO 8 HR- Longevity	
	<u>119357</u>		Cartwright, Angela Z	Vacation Yrs	Adjustment	11/10/2022	0.0000	Hours	22.0000	Posted		11 MO 8 HR	

Figure 5: Leave Details Tab is where Accrual and Adjustment Transactions will be Listed and Created.