# 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.

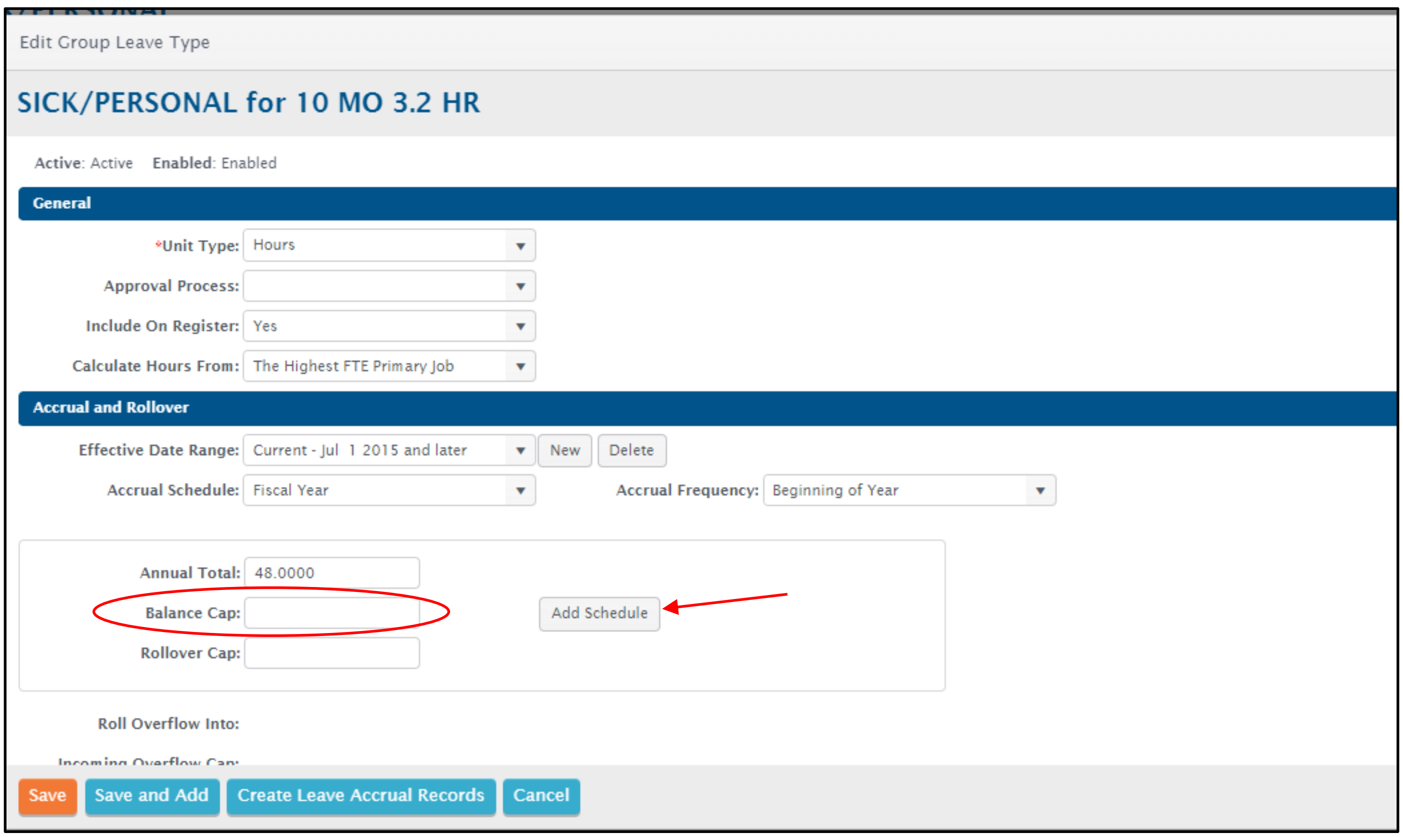


*Figure 1: Edits to Balance Cap Can Be Made Within Each Leave Group*

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**.

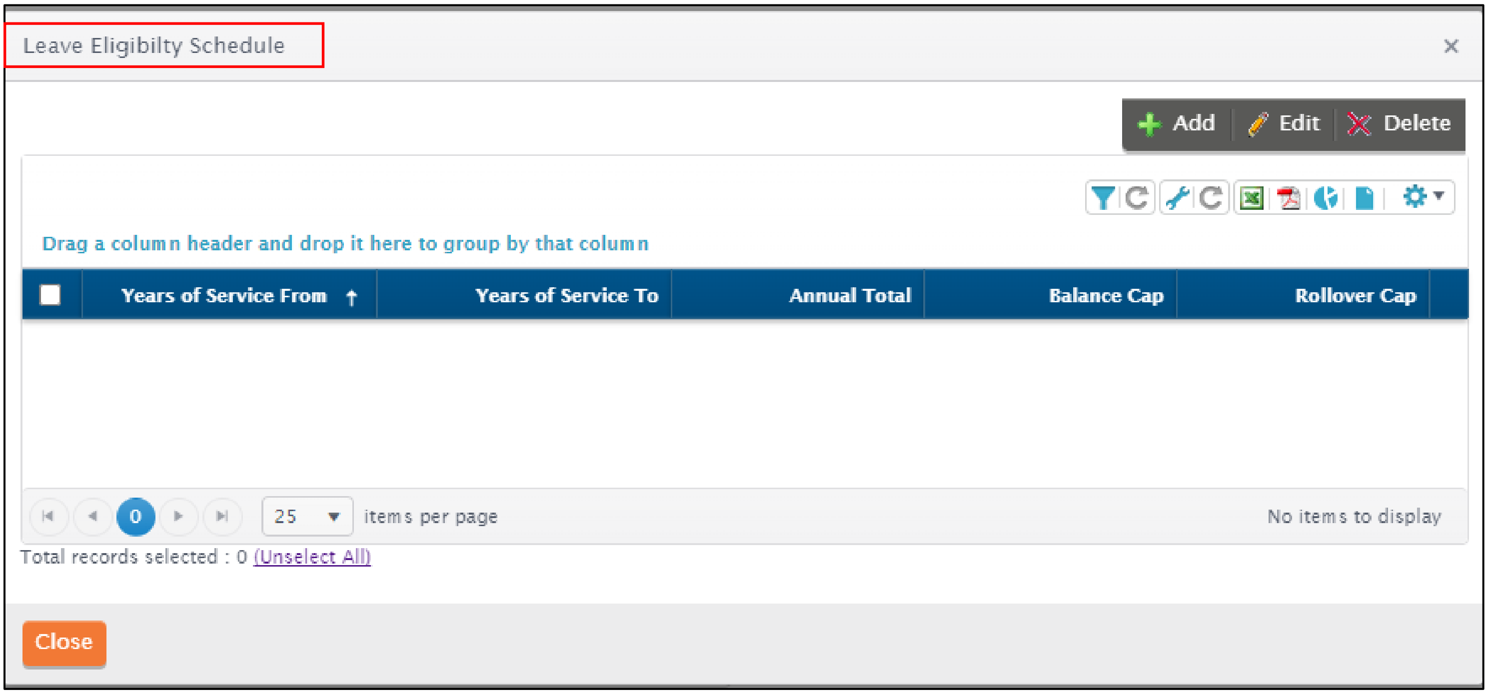


*Figure 2: The New Leave Eligibility Schedule Pop-Up Screen*

## 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**.

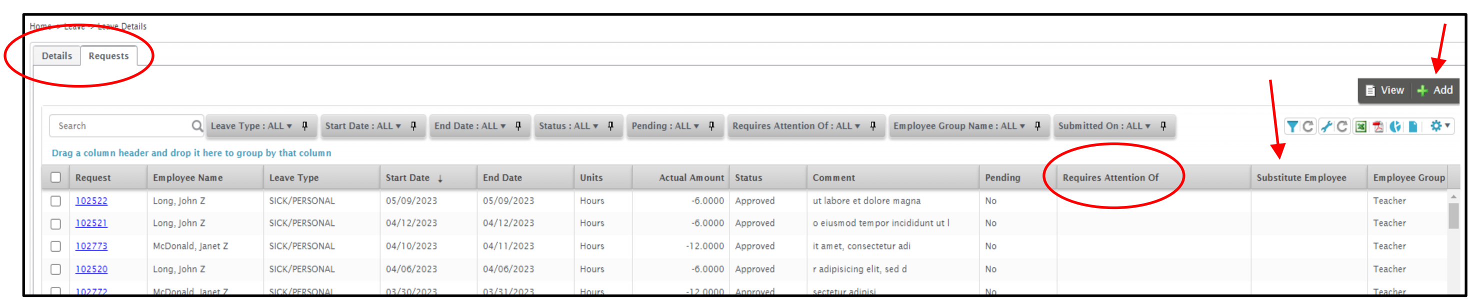


*Figure 3: New Requests Tab in Leave Details*

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.

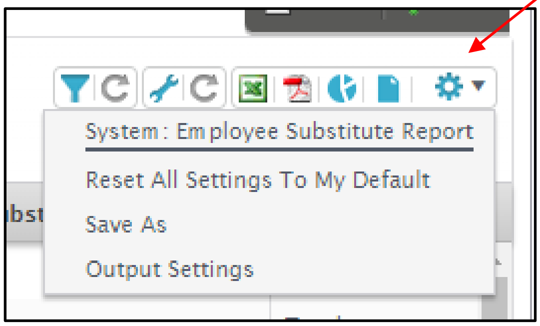


*Figure 4: Employee Substitute Report Selection now Found In Requests Tab.*

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.

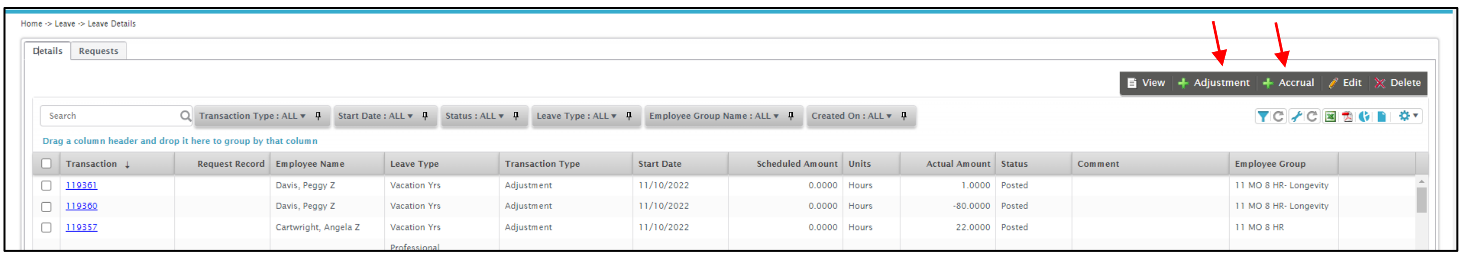


*Figure 5: Leave Details Tab is where Accrual and Adjustment Transactions will be Listed and Created.*