



**addressleave**



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☐ In the current year payroll frequency, generate the [Payroll > Reports > Leave Information Reports > HRS7350 - Leave Status Report](#) for active employees and exclude substitutes. Print and/or save this report and review it for accuracy.

Parameter Description	Value
Sort by Alpha (A), Pay Campus (C), Primary Campus (P)	A
Page Break by Employee? (Y/N)	N
Select Leave Type(s), or blank for ALL	
Pay Status Active (A), Inactive (I), or blank for ALL	A
Pay Type 1-4, Exclude Subs (E), or blank for ALL	E
Select Pay Campus(es), or blank for ALL	
Select Primary Campus(es), or blank for ALL	
Select Extract ID(s), or blank for ALL	
Select Employee(s), or blank for ALL	

☐ Use the **Payroll > Utilities > Mass Update > Leave** tab to update employee master leave record balances. This is a three-step process.

Leave type codes are LEA-specific.

1a. This step clears the **Leave Used** and **Leave Earned** fields and rolls the ending balances to the following year beginning balances:

Utilities > Mass Update

Year: C

Parameters

Pay Status:  Active  Inactive  Both

Pay Type: E Exclude Substitute

Job Code: All

Accrual Code: All

Pay Grade:

Prior Yr Emp Date: 00-00-0000

Primary Campus: All

Payoff Date:

Pay Campus: All

Frequency: 6 Monthly CYR

Contract Begin Date:

Salary Concept: All

Contract End Date:

Extract ID:

Contract Months:

Employee Nbr:

Reset

DEDUCTIONS LEAVE EMPLOYEE EXTRA DUTY JOB CODE SALARY CALCULATION

Method

Zero Leave Values for Employees

Add Leave Code to Employees

Delete Leave Code from Employees

Increment Leave Earned to Employees

Type	Description	Leave Earned	Leave Used	End Balance
01	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
02	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
03	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
04	JURY DUTY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
05	SCH BUS/WO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
06	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
07	STATE PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
08	STATE PERS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
09	LOCAL/CURR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Execute

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Method**, select **Zero Leave Values for Employees**.
- Under **Leave Earned** and **Leave Used**, select all leave types to be set to zero for the new school year. Be sure to process both options at the same time to prevent inaccurate balances.
- Do not select **End Balance** unless you want to set the balance to zero for that leave type. If this field is not selected, the 2022-2023 ending balances are rolled to the beginning balance fields for the 2023-2024 school year.
- Click **Execute**.
- Print the report.

1b. You may have leave codes for which you want to zero the end-of-year balance. For example, Jury Duty, School Business, etc.

The screenshot shows the 'Utilities > Mass Update' interface for 'Payroll'. The 'Parameters' section includes:

- Pay Status:**  Active,  Inactive,  Both
- Pay Type:** E Exclude Substitute
- Job Code:** All
- Accrual Code:** All
- Pay Grade:** [Empty]
- Prior Yr Emp Date:** 00-00-0000
- Primary Campus:** All
- Payoff Date:** [Empty]
- Pay Campus:** All
- Contract Begin Date:** [Empty]
- Contract End Date:** [Empty]
- Contract Months:** [Empty]
- Frequency:** 6 Monthly CYR
- Salary Concept:** All
- Extract ID:** [Empty]
- Employee Nbr:** [Empty]

The **LEAVE** tab is selected, showing the **Method** section with  Zero Leave Values for Employees selected. Below is a table of leave types with checkboxes for 'Leave Earned', 'Leave Used', and 'End Balance'.

Type	Description	Leave Earned	Leave Used	End Balance
01	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
02	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
03	LOCAL PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
04	JURY DUTY	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
05	SCH BUS/WO	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
06	INVALID	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
07	STATE PR 9	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
08	STATE PERS	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
09	LOCAL/CURR	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

An arrow points to the **Execute** button.

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Method**, select **Zero Leave Values for Employees**.
- Select **Leave Earned**, **Leave Used**, and **End Balance** for all leave types you want to zero out completely and not carry forward ending balances.
- Click **Execute**.
- Review and print the report. Verify the accuracy of the data.
- Click **Process** to complete the changes.

2. This step automatically adds leave types to active employees who do not have the leave type assigned on their leave balance record. This step must be completed before leave is mass incremented in step 3.

The screenshot shows the 'Utilities > Mass Update' payroll interface. The 'Parameters' section includes 'Pay Status' (Active selected), 'Pay Type' (E Exclude Substitute), 'Job Code' (All), 'Accrual Code' (All), 'Pay Grade' (empty), and 'Prior Yr Emp Date' (00-00-0000). The 'Add Leave Code' section shows 'New Code' (08 - STATE PERSON), 'Begin Balance' (.000), 'Leave Earned' (.000), 'Leave Used' (.000), and 'Ending Balance' (.000). An 'Execute' button is highlighted with a large black arrow pointing down.

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Method**, select **Add Leave Code to Employees**.
- In the **New Code** field, select the leave code.
- Do not add balances.
- Click **Execute**.
- Review and print the report. The report only displays the employees who will have the leave code added.
- Repeat this step for each leave type to be added before it is incremented in step 3.

3. This step increments leave earned to employees:

Utilities > Mass Update Payroll

Year: C Frequency: 6

Parameters

Pay Status:  Active  Inactive  Both

Primary Campus: All Payoff Date: [ ]

Pay Campus: All Frequency: 6 Monthly CYR

Contract Begin Date: [ ] Salary Concept: All

Contract End Date: [ ] Extract ID: [ ]

Contract Months: [ ] Employee Nbr: [ ]

Pay Type: E Exclude Substitute

Job Code: All

Accrual Code: All

Pay Grade: [ ]

Prior Yr Emp Date: 00-00-0000

DEDUCTIONS LEAVE EMPLOYEE EXTRA DUTY JOB CODE SALARY CALCULATION

Method

Zero Leave Values for Employees

Add Leave Code to Employees

Delete Leave Code from Employees

Increment Leave Earned to Employees

Type	Description	Leave Earned	Increment
01	INVALID	<input type="checkbox"/>	0.000
02	LOCAL PR 9	<input checked="" type="checkbox"/>	5.000
03	LOCAL PR 9	<input checked="" type="checkbox"/>	5.000
04	JURY DUTY	<input type="checkbox"/>	0.000
05	SCH BUS/WO	<input type="checkbox"/>	0.000
06	INVALID	<input type="checkbox"/>	0.000
07	STATE PR 9	<input checked="" type="checkbox"/>	5.000
08	STATE PERS	<input checked="" type="checkbox"/>	5.000

Execute

**Note:** If you have a maximum balance designated on the leave type table, this step will not allow the leave balance to exceed the maximum number set on the leave type table.

- Under **Pay Status**, select **Active**.
- In the **Pay Type** field, select *E Exclude Substitute*.
- Under **Method**, select **Increment Leave Earned to Employees**.
- Select **Leave Earned** for the applicable leave types (as defined in your local policy).
- In the **Increment** field, enter the number of days to increment.
- Click **Execute**.
- Review and print the report. The report includes a list of those employees who have reached a maximum of any leave type.
- If the report is accurate, click **Continue**.
- The second report displays the newly incremented leave earned and the new ending balances. Click **Process**.

Process Cancel

First Last

Date Run: Increment Leave Earned for Employees Page: 1 of 7  
 Cnty Dist: ISD Frequency: 6

Emp Nbr	Employee Name	Leave Type	Original Earned	New Earned	Original End Bal	New End Bal
000046	AUSSEM, AMY J	08 - STATE PERS	0.000	5.000	68.000	73.000
000096	BENTON, ANTONIO L	07 - STATE PR 9	0.000	5.000	5.000	10.000
000096	BENTON, ANTONIO L	08 - STATE PERS	0.000	5.000	83.000	88.000
000125	BLOUNT, BARBARA A	07 - STATE PR 9	0.000	5.000	6.000	11.000

- Click **OK**.

For new employees, leave balances must be individually updated from their service record information on the [Payroll > Maintenance > Staff Job/Pay Data > Leave Balance](#) tab.