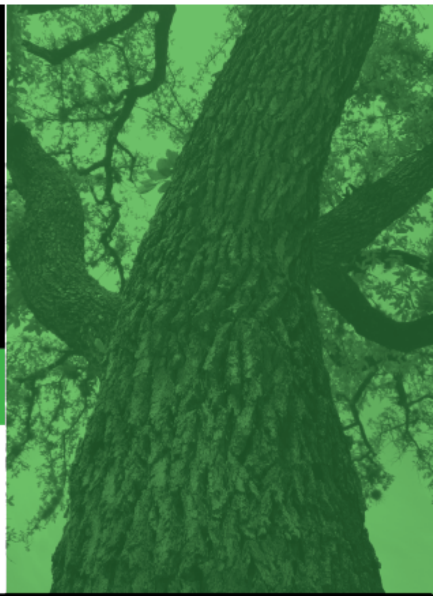
ASCENDER GUIDES



Staff Leave Maintenance - HRS3200

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Payroll > Maintenance > Leave Account Transaction > Staff Leave Maint

This tab is used to add/change leave records for an employee before a payroll is run. When an employee is retrieved, the system displays the current leave balances (including unprocessed records) for each leave type.

The input section of the tab allows you to add records or select existing records, processed and unprocessed, by pay date or date range. You can modify unprocessed records only. Leave that has been posted to payroll and negative units of leave are managed on the Leave Adjustment tab. Leave associated with a substitute is displayed but cannot be modified using this tab. You need to modify leave associated with a substitute on the Employee Substitute tab. You must enter a pay date when updating leave data because leave sequencing on this tab is done in real-time. When adding or changing records, the system issues a warning if:

- You are using a date that has already been used.
- The record uses more leave than is available for that leave type.

Create leave data:

Retrieve an existing record.	Search for a record. Begin typing the employee name or number. As you type the data, a drop-down list of corresponding data is displayed. Select an employee and click **Retrieve**. Or, click **Directory** to perform a search in the Employees directory.

In the display-only grid at the top of the tab, select the type of leave data to update.

Click **Print Balance** to print a summary of all of the employee's beginning/current leave balances.

In the free-form area between the grids, select either of the following methods to retrieve existing leave transactions or add new leave transactions:

Pay Date	Click ⌄ to select a specific pay date with unprocessed leave transactions, and the leave transactions for this pay date are automatically retrieved into the detail grid. You do not need to click **Retrieve** to view unprocessed leave for the pay date selected. Simply highlight the leave type in the upper grid, and any leave posted to the selected leave type is displayed. If you click **Retrieve**, then all unprocessed and processed transmittals are displayed. If no data is retrieved, click **+Add** to add a row. A row is added to the grid with the **Leave Type** and **Abs Reason** fields defaulted to the selected **Leave Type** in the top grid. The **Leave Type** and **Abs Reason** must be active when creating or modifying a leave transmittal.

Pay Date	The selected pay date is displayed.
Abs/Earned Date	Type the absence date in the MMDDYYYY format. This is a required field.

Leave Type	Click ⋮ to select the leave type code. The available leave types correspond to the selected employee. The selected leave type code description is displayed in the **Leave Type Description** field. This is a required field. The leave type must be in an active status to be used or updated.
Abs Reason	Click ⌄ to select the absence reason code. The available absence reasons correspond to the selected leave type. The selected absence reason code description is displayed in the **Abs Reason Description** field. The absence reason must be in an active status to be used or updated.
Leave Used	Type the amount of leave used for the type of leave and pay date.
Leave Earned	Type the amount of leave earned for the type of leave and pay date. This field can be used to award leave to an employee who did not receive leave when the leave was posted for the start of the school year. When payroll is posted, the amount entered here is posted to the employee's leave earned on the Leave tab in the Staff Job/Pay Data page.
Sub Type	If this record is being created on this tab, the field is blank and cannot be edited. If this record was created on the Employee Substitute tab, the field is populated with the substitute type code and cannot be edited.
Process Date	Displays the date processed.
User ID	Displays the name of the user who created the pay date data. Users are created in the Security Administration application.

Note: A warning message is displayed when the user attempts to save a leave type that exceeds the defined maximum balance for that leave type. The user is prompted to save or cancel the transaction. If the user chooses to save the transaction, the defined maximum ending balance is used when payroll calculations are performed.

Inquiry From Date	Type the beginning inquiry date in the MMDDYYYY format. The cursor automatically moves to the **Inquiry To Date** field. You can accept the default date, or type the ending inquiry date in the MMDDYYYY format. These do not have to be pay dates. If no dates are selected, transmittals for all pay dates are extracted. Click **Retrieve**. The detail grid is populated with existing data that is retrieved. The **Process Date** field is populated with the date the payroll was processed.

Note: Leave inquiries enable you to view all processed and unprocessed leave transmittals based on the dates entered in the from and to fields. Again, once the inquiry is performed, you simply have to click on the leave type in the upper grid, and if there are any transactions for that leave type, they are displayed.

❏ Click **Save**.

Other functions and features:

Retrieve	Retrieve data. The **Retrieve** button is also used to retrieve information from the last save. If you click **Retrieve**, any unsaved changes are lost.
	Click to view additional information for a row.
	Delete a row. Click to delete a row. The row is shaded red to indicate that it will be deleted when the record is saved. Click **Save**.
Documents	View or attach supporting documentation.