


## Absence Management (ESS): View Absence Balances


For All Employees eligible for some form of paid time off

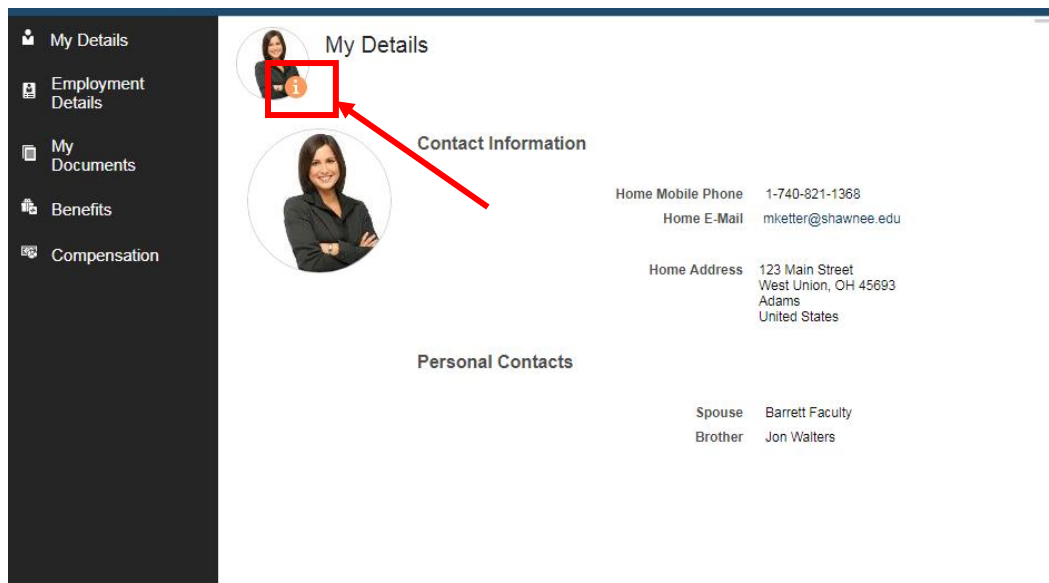
### Intro

- Purpose:** To view employee absence balances in Bear Trax.
- How to Access:** From the Navigator, under “ Me” select “Personal Information”.
- Click the information icon  to the right of My Details.
- Select Absences and then Manage Absence Records.
- Helpful Hints:** Be sure to keep in mind that...
- You can project your balance calculations into the future.
  - You can also submit a request for absence.
  - You can view the balances for different types of leave.
  - You can view any pending or approved absences.
- Procedure:** Complete the following steps to view your absence balances:

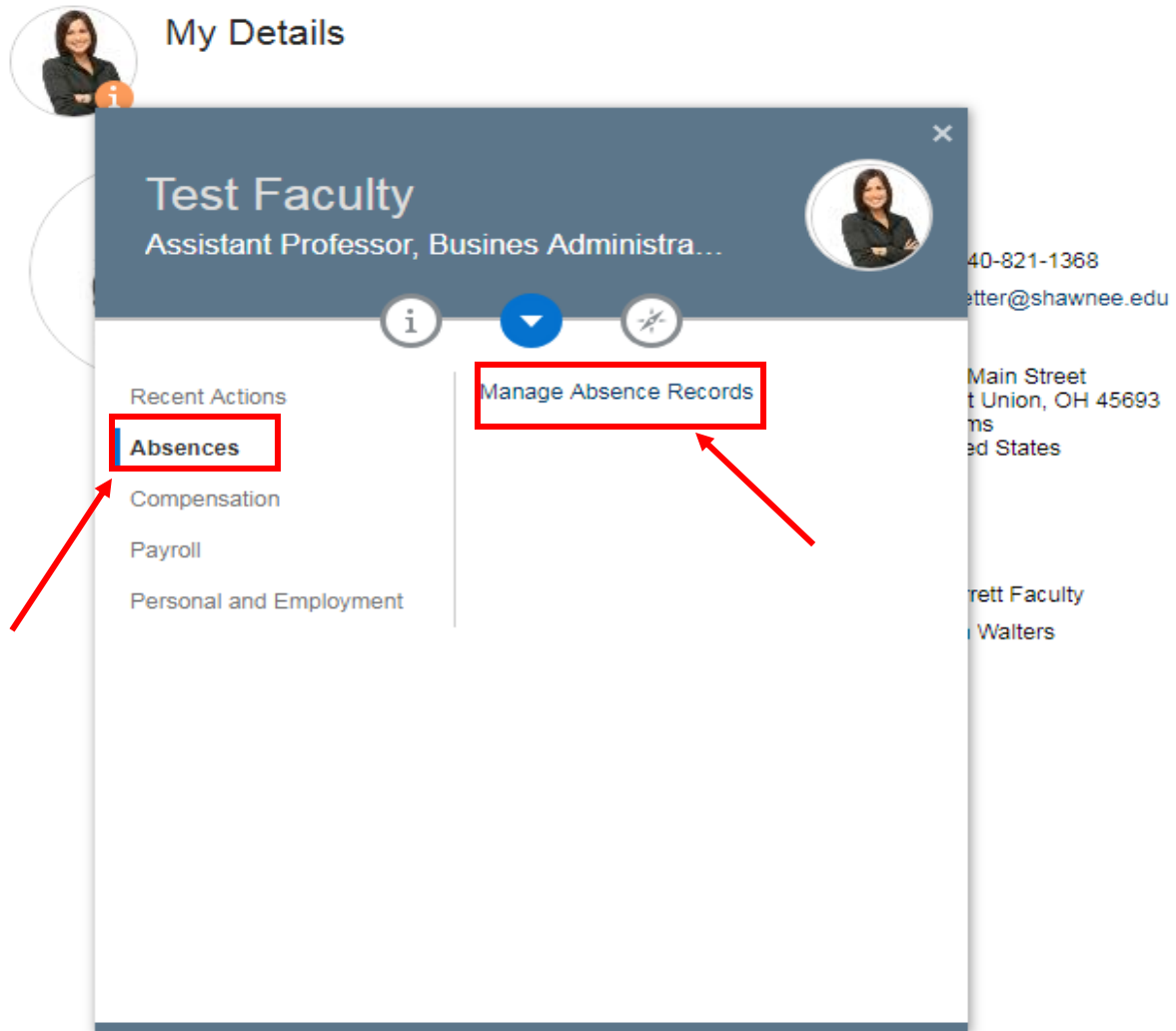
### View Absence Balances

Follow these steps to view a record of your absence requests, absence plans and balances:

1. Navigate to Personal Information and click the Smart Navigation Icon  on the right side of My Details to view dropdown menu.



1. Select “Absences” and then “Manage Absence Records.”



## View Balance Details

To view a record of your absence plan balances from the Manage Absence Records page:

1. View the balance under the Balance column.

View  Format  + Add Dates  Absence Type  Status

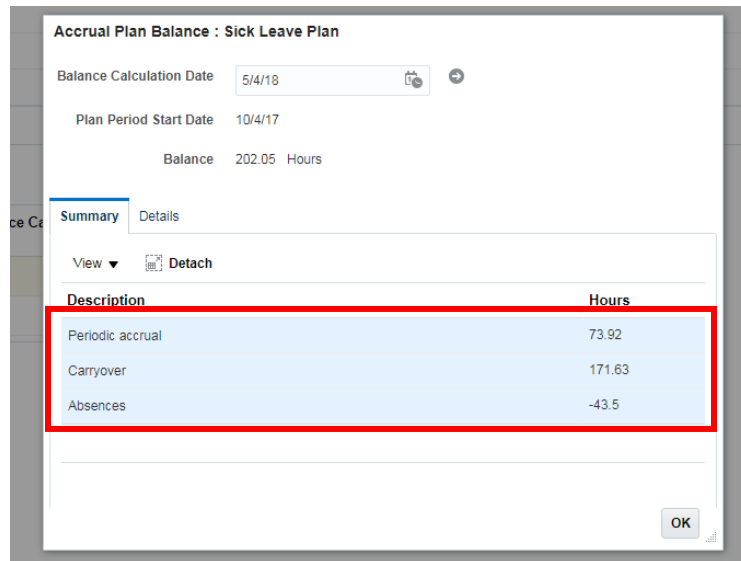
Dates	Absence Type
7/23/18 - 7/27/18	Vacation
4/24/18 - 4/24/18	Sick Leave
4/20/18 - 4/20/18	Sick Leave
4/6/18 - 4/6/18	Vacation

▲ Plan Balances

Plan	Type	Balance Calculation Date	Balance	Actions
Sick Leave Plan	Accrual	5/4/18	202.05 Hours	<input type="button" value="v"/>
Vacation Plan - Support and Admin	Accrual	5/4/18	247.09 Hours	<input type="button" value="v"/>

2. Click on the plan title to view additional plan balance information. Information includes:

- a. An accrual summary showing combined accruals to-date and amount of time available for carry over to the next year as well as your absence time you've used.



**Accrual Plan Balance : Sick Leave Plan**

Balance Calculation Date: 5/4/18

Plan Period Start Date: 10/4/17

Balance: 202.05 Hours

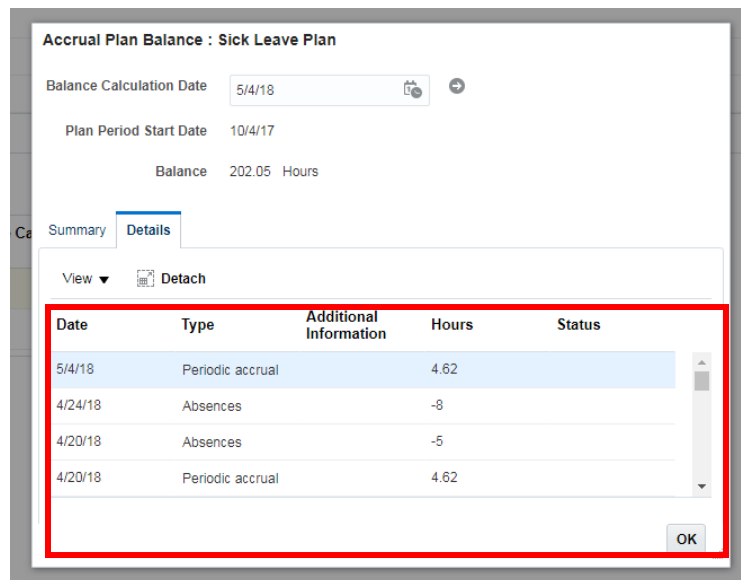
Summary | Details

View ▾ Detach

Description	Hours
Periodic accrual	73.92
Carryover	171.63
Absences	-43.5

OK

- b. Details for Absence Type Balance Changes (e.g. accruals)



**Accrual Plan Balance : Sick Leave Plan**

Balance Calculation Date: 5/4/18

Plan Period Start Date: 10/4/17

Balance: 202.05 Hours

Summary | Details

View ▾ Detach

Date	Type	Additional Information	Hours	Status
5/4/18	Periodic accrual		4.62	
4/24/18	Absences		-8	
4/20/18	Absences		-5	
4/20/18	Periodic accrual		4.62	

OK

- c. Amount you are eligible to carry over to the next year

**Accrual Plan Balance : Sick Leave Plan**

Balance Calculation Date: 5/4/18

Plan Period Start Date: 10/4/17

Balance: 202.05 Hours

Summary | Details

View ▾ | Detach

Description	Hours
Periodic accrual	73.92
Carryover	171.63
Absences	-43.5

OK

## Calculating an Absence Balance for a Future Date

Follow these steps to calculate a projected absence balance at a future date:

1. Navigate to the Manage Absence Records page and click the title of the plan for which you would like to view the future balance.

View ▾ | Format ▾ | + Add | Dates: Last six months ▾ | Absence Type ▾ | Status ▾

Dates	Absence Type	Duration	Status	Delete
4/18/17	Sick Leave	8 Hours	Awaiting approval	✕
4/11/17 - 4/12/17	Sick Leave	16 Hours	Awaiting approval	✕

**Accrual Balances**

Plan	Balance Calculation Date	Balance
Sick Leave Plan - Non Faculty	4/7/17	152.34 Hours
Vacation Plan - Support and Admin	4/7/17	209.1 Hours

2. Enter the future date in the Balance Calculation Date field.
  - a. Click the grey arrow to calculate the projection.

3. Click "OK" to return to the Manage Absence Records main page.
4. Projected balance amounts will appear under the Details tab of your selected plan balance when you change the Balance Calculation Date.

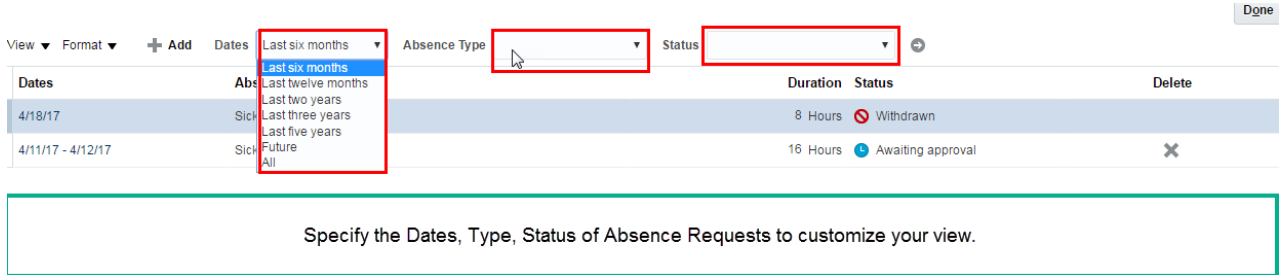
Date	Type	Reason	Value	Projected
5/5/17	Periodic accruals		4.62	✓
4/21/17	Periodic accruals		4.62	✓
4/18/17	Absences		-8	
4/12/17	Absences		-8	
4/11/17	Absences		-8	

5. Note that the screen displays projected accruals and any upcoming absences that will affect your future absence plan balance.

## Viewing Past Requests

Follow these steps to view specific absence requests of different type, age, or status:

1. Click the drop-down menus at the top of the page and select the options that apply.



View ▾ Format ▾ + Add Dates ▾ Absence Type ▾ Status ▾ Done

Dates	Abs	Duration	Status	Delete
4/18/17	Sick	8 Hours	Withdrawn	
4/11/17 - 4/12/17	Sick	16 Hours	Awaiting approval	✕

Specify the Dates, Type, Status of Absence Requests to customize your view.

2. Click the arrow to the right of Status. The screen will display the requests that fit your specifications.

## Final Notes

By following these steps, you have successfully viewed your absence balances.