

Absence Management (ESS): View Absence Balances

For All Employees eligible for some form of paid time off

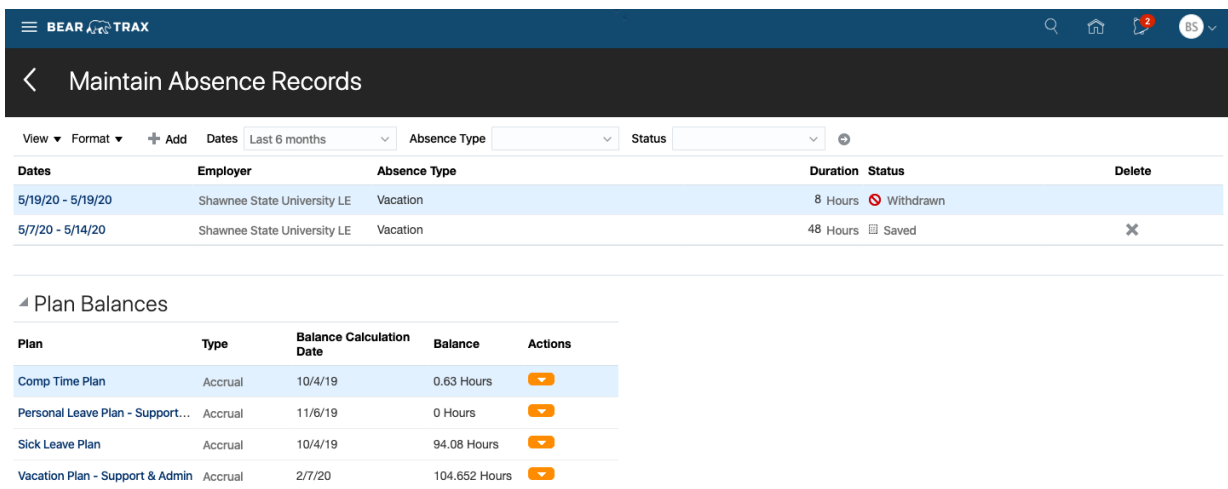
Intro

- Purpose:** To view employee absence balances in Bear Trax.
- How to Access:** From the Navigator, under “ Me” select “Absence”.
- 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. From the Navigator, go to Me > Absence. This will direct you to the *Maintain Absence Records* page.



Dates	Employer	Absence Type	Duration	Status	Delete
5/19/20 - 5/19/20	Shawnee State University LE	Vacation	8 Hours	Withdrawn	
5/7/20 - 5/14/20	Shawnee State University LE	Vacation	48 Hours	Saved	X

Plan	Type	Balance Calculation Date	Balance	Actions
Comp Time Plan	Accrual	10/4/19	0.63 Hours	
Personal Leave Plan - Support...	Accrual	11/6/19	0 Hours	
Sick Leave Plan	Accrual	10/4/19	94.08 Hours	
Vacation Plan - Support & Admin	Accrual	2/7/20	104.652 Hours	

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	Last 6 months	Absence Type	Status	
Dates	Employer	Absence Type	Duration	Status	Delete		
5/19/20 - 5/19/20	Shawnee State University LE	Vacation	8 Hours	Withdrawn			
5/7/20 - 5/14/20	Shawnee State University LE	Vacation	48 Hours	Saved		✕	

Plan	Type	Balance Calculation Date	Balance	Actions
Comp Time Plan	Accrual	10/4/19	0.63 Hours	▼
Personal Leave Plan - Support...	Accrual	11/6/19	0 Hours	▼
Sick Leave Plan	Accrual	10/4/19	94.08 Hours	▼
Vacation Plan - Support & Admin	Accrual	2/7/20	104.652 Hours	▼

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

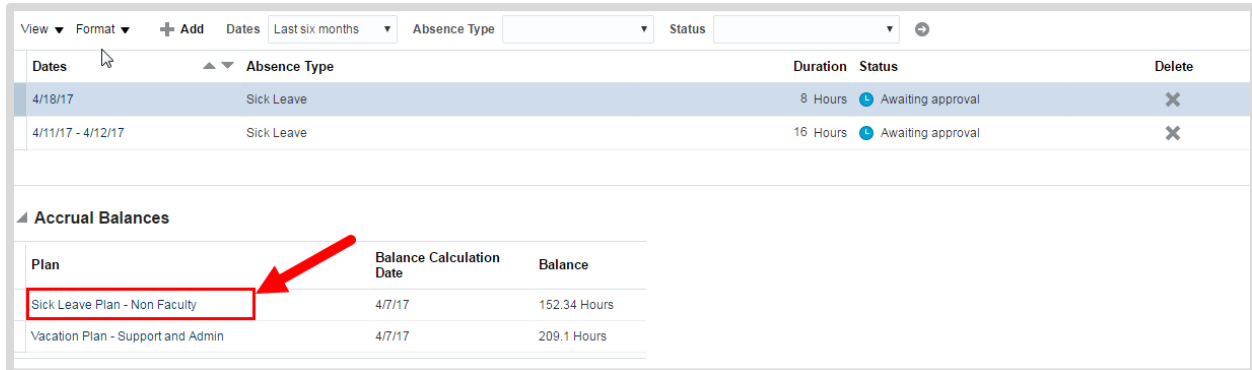
Description	Hours
Periodic accrual	73.92
Carryover	171.63
Absences	-43.5

OK

Calculating an Absence Balance for a Future Date

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

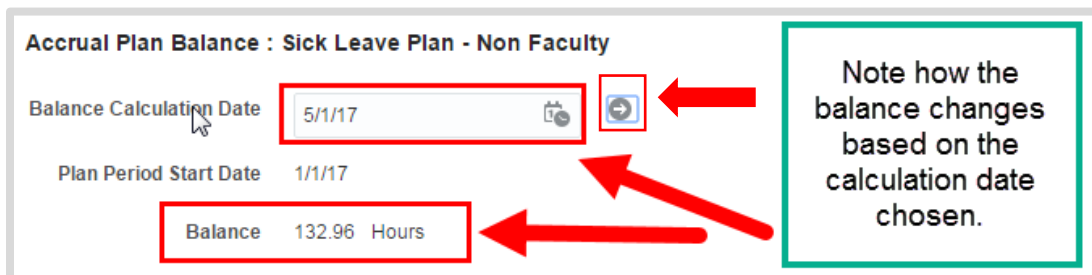
1. Navigate to the Manage Absence Records page and click the title of the plan for which you would like to view the future balance.



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	✕

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

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



Accrual Plan Balance : Sick Leave Plan - Non Faculty

Balance Calculation Date: 5/1/17

Plan Period Start Date: 1/1/17

Balance: 132.96 Hours

Note how the balance changes based on the calculation date chosen.

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



Accrual Plan Balance : Sick Leave Plan - Non Faculty



Balance Calculation Date  

Plan Period Start Date

Balance 137.58 Hours

Summary **Details**

View   Detach







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	




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.