



# Job Aid: TA22 Adjust a Leave Balance for an Employee

Last Update: 04/25/2023



## Document Version History

Date	Version	Comments
04/25/2023	1.0	Initial version

## Pre-Requisites/ Job Descriptions

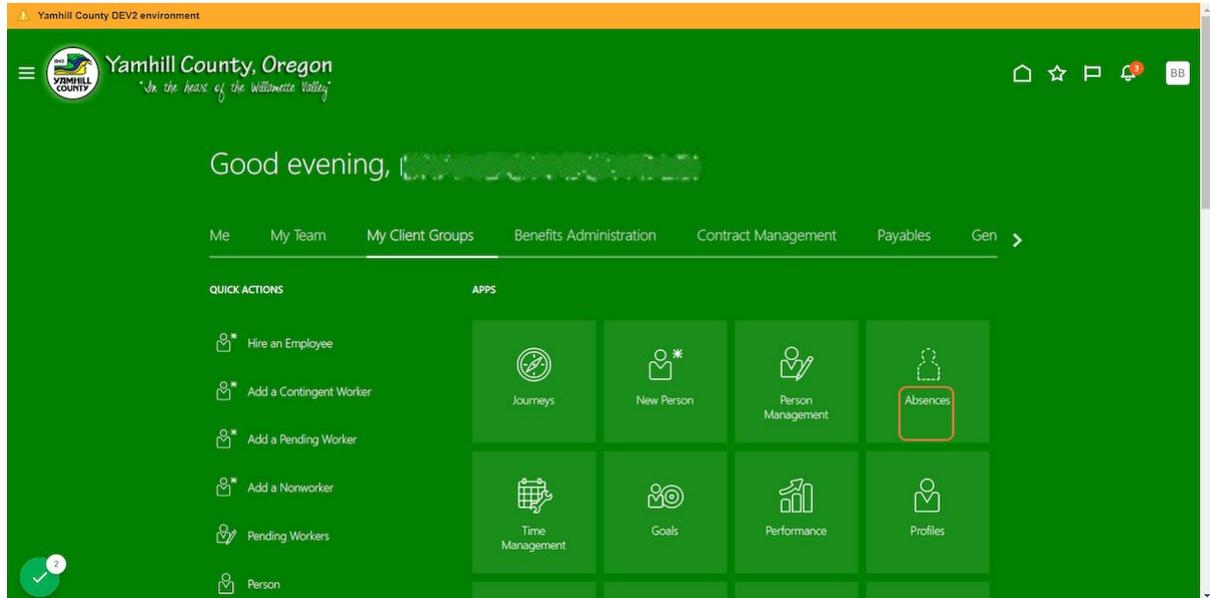
This job aid is applicable to the following Oracle Cloud job descriptions:

ID	Job Description
01	Time Administrator



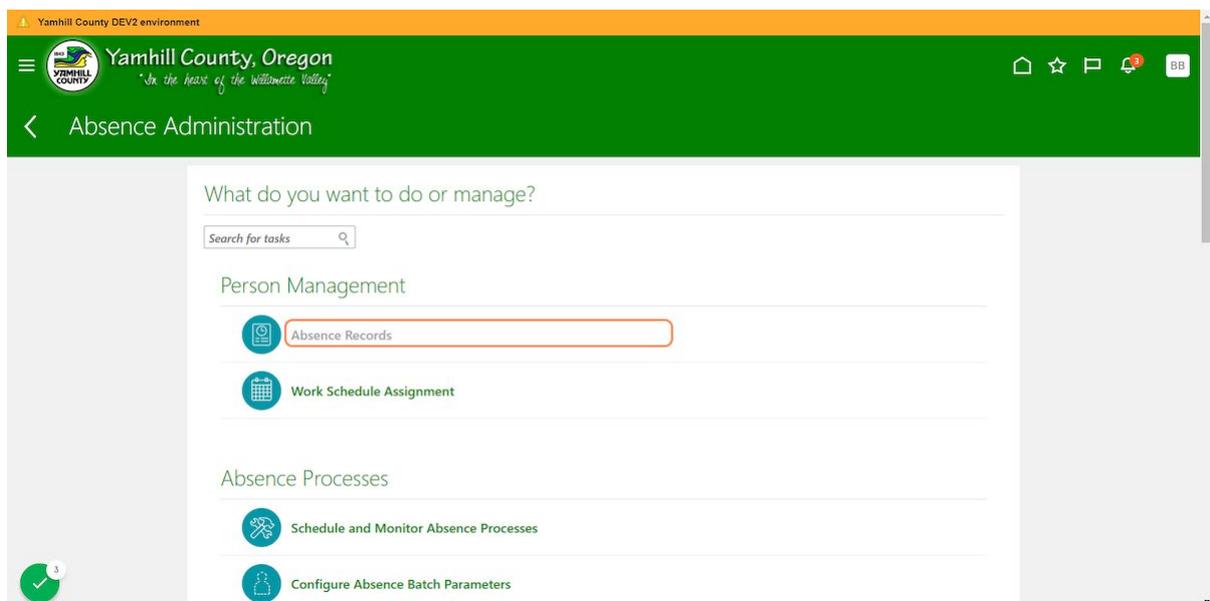
STEP 1

Login to Oracle Fusion Cloud. Click on the “Absences” tile, under the “My Client Groups” tab.



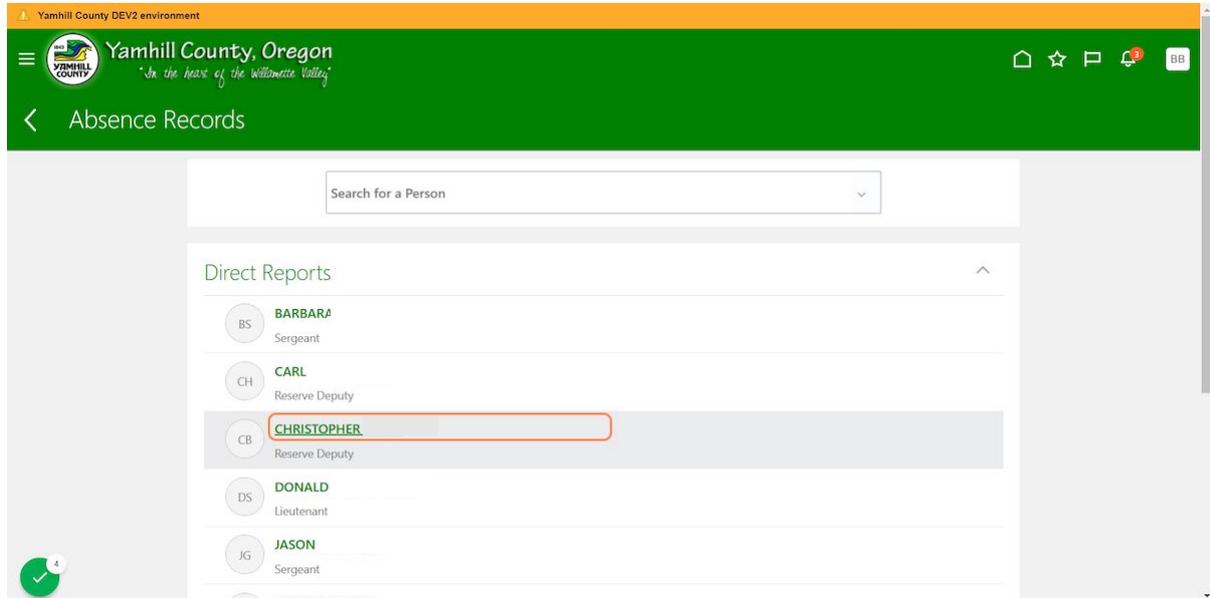
STEP 2

Click on the “Absence Records” option.



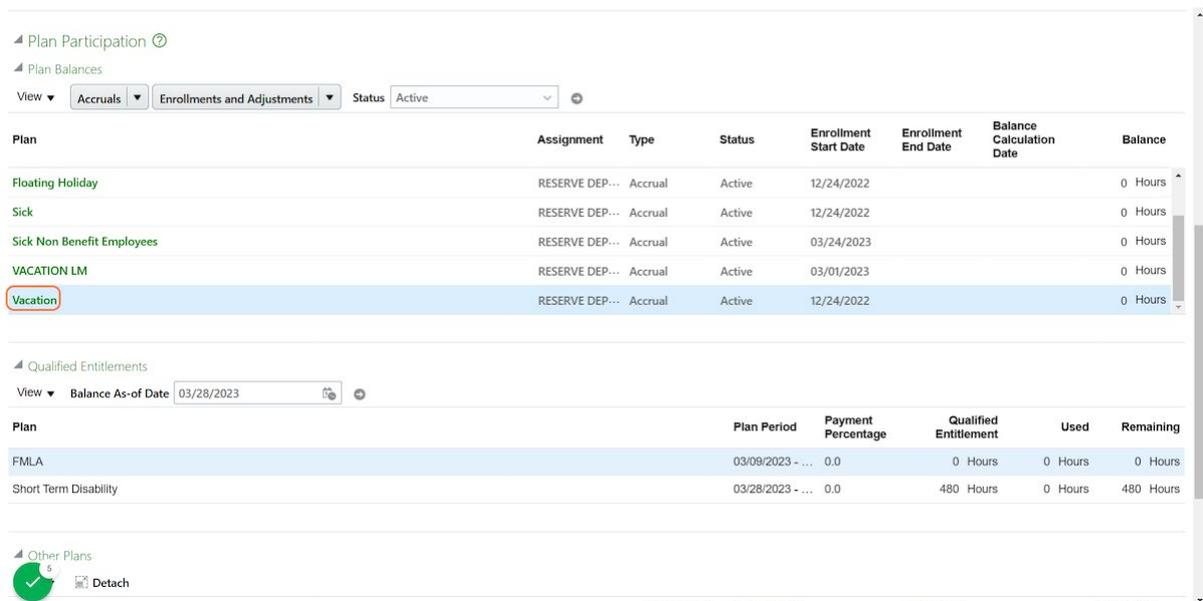
STEP 3

In the “Search for a Person” field, enter the employee’s name or directly select the employee from the Direct Reports.



STEP 4

Under the “Plan Balances” section, highlight the leave plan you want to adjust by clicking on it.



### STEP 5

Click the dropdown next to “Enrollments and Adjustments” and select “Adjust Balance”.

The screenshot shows the 'Plan Participation' section with 'Plan Balances' selected. The 'View' dropdown is set to 'Accruals' and the 'Status' is 'Active'. The 'Enrollments and Adjustments' dropdown menu is open, showing options: Add Enrollment, Update Enrollment, Delete Enrollment, Adjust Balance (highlighted with a red circle), Initiate Donation, Transfer Balance, Disburse Balance, and Update Balance Details. Below the menu is a table of plan balances:

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Floating Holiday	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours
Sick	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours
Sick Non Benefit Employees	RESERVE DEP...	Accrual	Active	03/24/2023			0 Hours
VACATION LM	RESERVE DEP...	Accrual	Active	03/01/2023			0 Hours
Vacation	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours

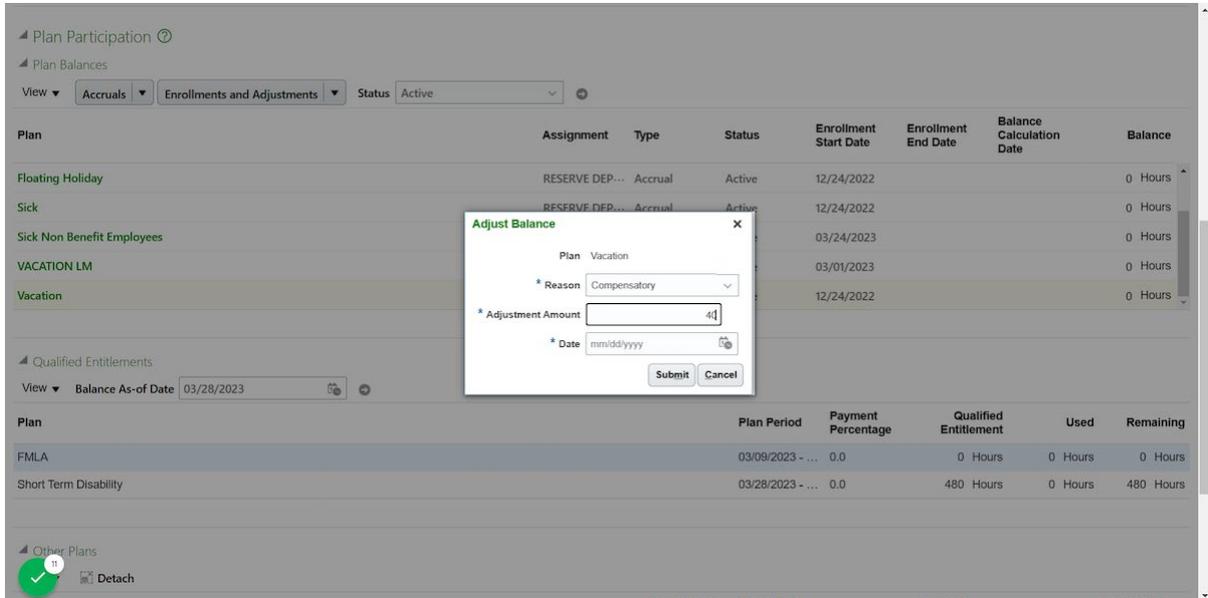
### STEP 6

In the Adjust Balance pop-up window, click the dropdown next to “Reason” and select an appropriate value.

The screenshot shows the 'Adjust Balance' pop-up window. The 'Plan' is 'Vacation'. The 'Reason' dropdown menu is open, showing options: Clerical Error and Compensatory (highlighted with a red circle). The 'Adjustment Amount' and 'Date' fields are also visible. The background shows the same table as in Step 5.

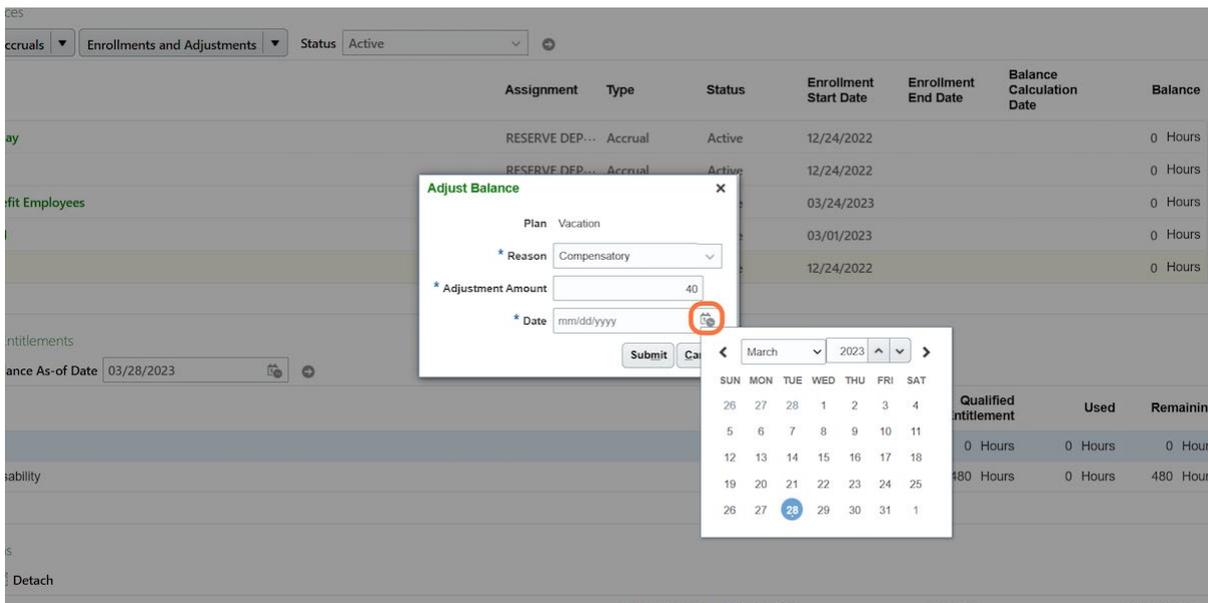
### STEP 7

In the “Adjustment Amount” field, enter the number of hours to add to the leave balance.



### STEP 8

Click the calendar icon next to the “Date” field and select the appropriate value.



### STEP 9

Click on the “Submit” button.

The screenshot shows the 'Plan Participation' interface. A modal window titled 'Adjust Balance' is open, displaying the following fields:

- Plan: Vacation
- \* Reason: Compensatory
- \* Adjustment Amount: 40
- \* Date: 03/28/2023

Buttons for 'Submit' and 'Cancel' are visible at the bottom of the modal. The background interface shows a table of plan balances and a table of qualified entitlements.

### STEP 10

Highlight the leave plan line again. Click on the dropdown next to “Accruals” and select “Run Accruals for a Selected Plan”.

The screenshot shows the 'Plan Participation' interface with the 'Accruals' dropdown menu open. The dropdown menu has two options: 'Run Accruals for All Active Plans' and 'Run Accruals for Selected Plan'. The 'Run Accruals for Selected Plan' option is highlighted with a red box. The background interface shows a table of plan balances and a table of qualified entitlements.



## STEP 11

In the pop-up window, click the calendar icon next to “Balance as of date” and update the value as required. Make sure that the “Calculate Accruals and Balances” button is checked.

The screenshot displays the 'Run Accruals for Selected Plan Vacation' pop-up window. The 'Balance As-of Date' field is set to 03/28/2023, and the 'Calculate accruals and balances' radio button is selected. The background interface shows a table of plan balances and a table of qualified entitlements.

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Floating Holiday	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours
Sick	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours
Sick Non Benefit Employees				03/24/2023			0 Hours
VACATION LM				03/01/2023			0 Hours
Vacation				12/24/2022			0 Hours

Plan	Plan Period	Payment Percentage	Qualified Entitlement	Used	Remaining
FMLA	03/09/2023 - ...	0.0	0 Hours	0 Hours	0 Hours
Short Term Disability	03/28/2023 - ...	0.0	480 Hours	0 Hours	480 Hours

## STEP 12

Click on the “Submit” button.

The screenshot shows the 'Run Accruals for Selected Plan Vacation' pop-up window with the 'Submit' button circled in red. The background interface is the same as in Step 11.

STEP 13

**A warning message will appear. Review the message and then acknowledge it by clicking on the “OK” button.**

The screenshot shows a software interface with a table of plan balances. A warning message box is overlaid on the table, containing the text: "Warning: Accruals for absence plan Commissioners Day were calculated only for the next period. (ANC-3405070) You can't calculate accruals for multiple future accrual periods simultaneously." The "OK" button in the warning box is highlighted with a red circle.

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Floating Holiday	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours
Sick	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours
Sick Non Benefit Employees	RESERVE DEP...	Accrual	Active	03/24/2023			0 Hours
VACATION LM	RESERVE DEP...	Accrual	Active	03/01/2023			0 Hours
Vacation	RESERVE DEP...	Accrual	Active	12/24/2022		01/08/2023	0.8 Hours

STEP 14

**Click on the specific plan hyperlink you adjusted to view the updated details.**

The screenshot shows a software interface with a table of existing absences. The "Vacation" row is highlighted with a red circle. Below the table, there are sections for "Plan Participation" and "Qualified Entitlements".

Dates	Employer	Type	Assignment	Duration	Status	Processing Status
[Empty row]						

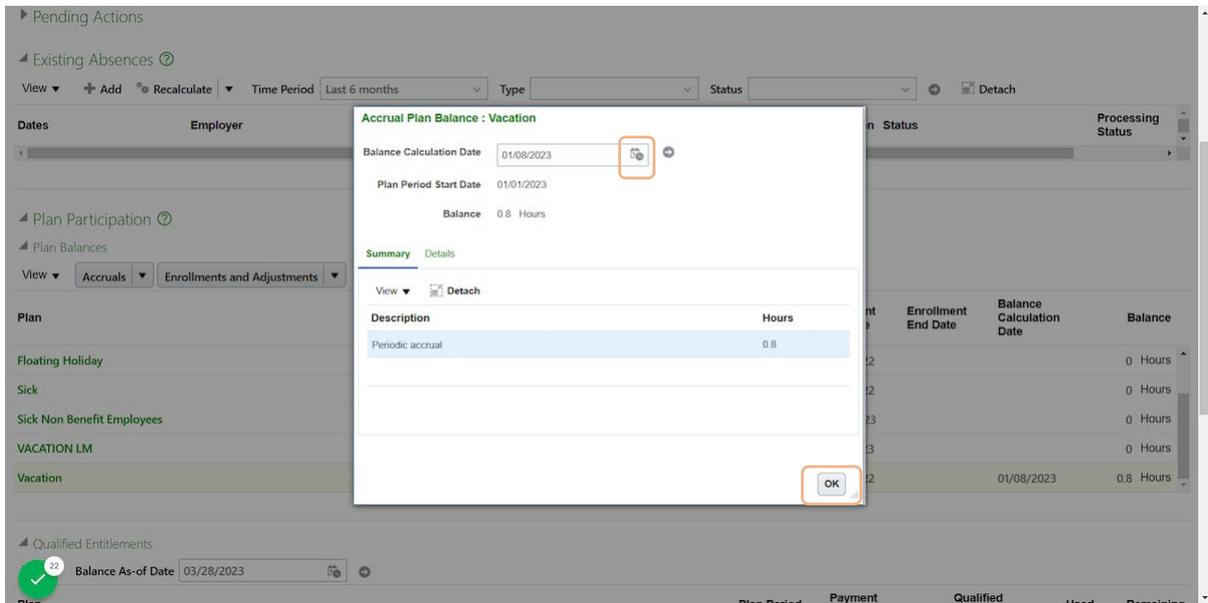
  

Plan	Assignment	Type	Status	Enrollment Start Date	Enrollment End Date	Balance Calculation Date	Balance
Floating Holiday	RESERVE DEP...	Accrual	Active	12/24/2022			0 Hours
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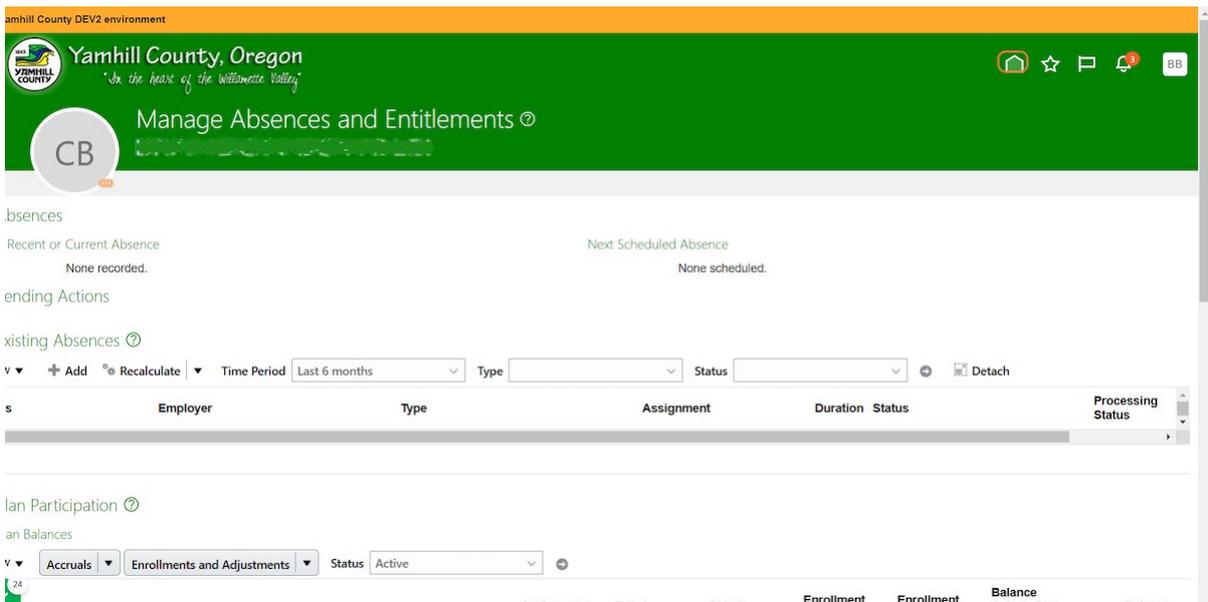
### STEP 15

Change the “Balance Calculation Date” so that the adjusted amount is visible with the periodic accrual. Click on the “OK” button to continue.



### STEP 16

Click on the “Home” icon to return to the main screen.



### STEP 17



## End of the procedure.

