

Carry Over Balance Instructions to View Potential Vacation Lapse to Sick Leave

In Workday, employees may view the number of vacation hours that could potentially roll to sick leave at the end of the fiscal year based on the maximum number of carryover hours allowed.

Note: The carryover amount does NOT take into account any state service anniversaries that may occur between the date the report is run and the end of the fiscal year that might make them eligible to carry over a higher amount. However, it does take into account all approved future time offs.

Here are some ways for employees/absence partners may view this information:

Employee - Option #1:

Login to SSO

Select 'Workday'

Select your 'Time Off' worklet

Under View ...

- Select 'Time Off Balance'
- Change the 'As of Date' to: 09/01 (1st day of next fiscal year)
- Select 'OK'
- Review the 'Carryover Forfeited in Period' column to find out if any vacation leave is expected to roll over to sick leave.

Employee - Option #2:

Login to SSO

Select 'Workday'

Click on your name or the cloud in the upper right of your screen.

- Click on 'View Profile'
- Click on Actions and hover over Time and Leave
- Select View Carryover Balances
- Leave date fields blank
- Select Vacation (or type vacation into the Time Off Plans field)
- Click 'OK'
- Review the 'Forfeited' column to find out if any vacation leave is expected to roll over to sick leave.

If there is a number greater than '0' in the forfeited column, this is the number of vacation hours that will be forfeited/moved to your sick leave balance if they are not used by fiscal year end.

ABSENCE PARTNER

Pull up the employee in Workday and go to:

Actions

Time and Leave

- Select View Carryover Balances
- Leave date fields blank
- Select Vacation (or type vacation into the Time Off Plans field)
- Click 'OK'
- Review the 'Forfeited' column to find out if any vacation leave is expected to roll over to sick leave.

CARRYOVER BALANCES FOR ORGANIZATION (BY WORKER)

Workday Help also has a report listed that will show more than one employee at a time. This report is called Carryover Balances for Organization (by Worker). Running this report for the vacation time off plan for 9/1/20XX, will give you the amount of vacation that will carryover from one Fiscal Year to the next and the amount of time that will be "forfeited" and rolled to sick time off.

Note: The report does not take into account any potential / future changes in state service levels that would allow a higher carryover amount. Once the new state service level is achieved the report will reflect the new level.