Appoint, Change, Terminate (ACT) Documentation
How to View Biweekly Accrual Balances

The HR Officer responsibility provides viewing access in the Administrative Systems to **BIWEEKLY PAID EMPLOYEES** benefit time accrual balances. Your access to a specific employee is determined by your assigned Organizational responsibility. For official UAB Benefit Time guidelines, ***click here***. (You and UAB Handbook, Section 3.3)

Note: Accrual balances for MONTHLY PAID EMPLOYEES are maintained on the departmental level, not in the Administrative Systems.   You will not be able to view accrual balance information on Monthly Paid Employees in the Administrative Systems. Contact the monthly paid employees' primary organization to obtain this information.

HR Officer → HR Transaction → HR Data View → View Biweekly Accrual Balances

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1. Double click on the ***plus (+) sign*** next to **HR DATA VIEW**. The **HR DATA VIEW** menu will expand.
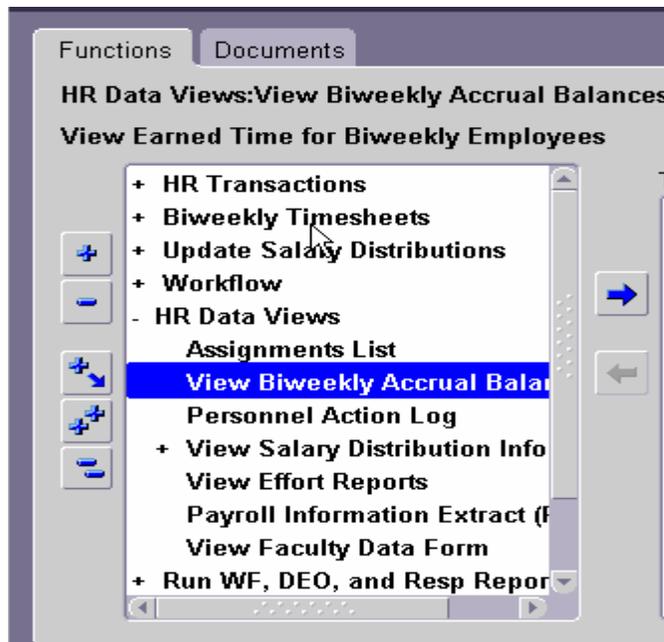
2. Select **VIEW BIWEEKLY ACCRUAL BALANCES**; click **OPEN**. The **FIND PERSON** window will display.

3. The **FIND PERSON** window is similar to the **ACT FIND WINDOW**. An employee can be located by:

    - Entering *the employees name* in the **NAME** field. (Last name, First Name).
    - Using the **NAME** field **LOV**.
    - Entering *the Employee Number* in the **EMPLOYEE NUMBER** field.
    - Using the **EMPLOYEE NUMBER LOV**.
    - Entering *the employees Social Security Number* in the **SSN** field.

4. Once the correct employee is displayed in the **FIND PERSON** window, click on the **FIND** button. The **LEAVE ACCUMULATOR** window will display.

5. The **LEAVE ACCUMULATOR** window displays the following information:

-   **VACATION BALANCE** -- Total number of vacation hours accrued and available to the employee. Vacation time is accrued each biweekly pay period according to the employee's vacation accrual rate.
-   **MAX VACATION ACCRUAL RATE** – The number of Vacation hours the employee accrues each biweekly pay period. For an explanation on Vacation Accrual Rates, *__click here.__* (YOU and UAB Handbook, Section 3.3.1).
-   **SICK LEAVE BALANCE** – Total number of Sick Leave hours accrued and available to the employee. Sick Leave is accrued each biweekly pay period according to the employee's assignment category. For more details on Sick Leave accruals and guidelines, *__click here.__* (YOU and UAB Handbook Section 3.3.3).
-   **PERSONAL HOLIDAY BALANCE** – Total number of personal holiday hours available to the employee. For an explanation on Personal Holiday accruals, *__click here.__* (YOU and UAB Handbook Section 3.3.2)
-   **RECEIVED SICK LEAVE DONATION** -- A checkmark will appear in the **RECEIVED SICK LEAVE DONATION** checkbox if the employee has at any point in time during their employment at UAB received Donated Sick Leave. For UAB policy regarding Donated Sick Leave, *__click here__*.

    Note: The Sick Leave Balance field reflects both __Donated Sick Leave__ and __Accrued Sick Leave__. The total number of Donated Sick Leave hours is recorded in the employee's Personal Action Log once the donated time has been approved through Records Administration.

6. In order to view the employees **ACCRUAL HISTORY**, click the **HISTORY** button. A window similar to the one below will open.

Accrual History (Davidson,Jason ,1030542)									
Accrual History									
		Beginning Balances			**Accrual Rates**			**Ending Balances**	
Pay Period	Vacation	Sick Leave	Pers Holiday	Vacation	Sick Leave	Pers Holiday	Vacation	Sick Leave	Pers Holiday
13-NOV-05 to 26-NOV-05	40.7	33.88	16.68	3.7	3.08	3.38	44.4	36.96	20.06
30-OCT-05 to 12-NOV-05	37	30.8	21.3	3.7	3.08	3.38	40.7	33.88	24.68
16-OCT-05 to 29-OCT-05	33.3	27.72	17.92	3.7	3.08	3.38	37	30.8	21.3
02-OCT-05 to 15-OCT-05	29.6	24.64	14.54	3.7	3.08	3.38	33.3	27.72	17.92
18-SEP-05 to 01-OCT-05	25.9	21.56	19.16	3.7	3.08	3.38	29.6	24.64	22.54
04-SEP-05 to 17-SEP-05	22.2	18.48	15.78	3.7	3.08	3.38	25.9	21.56	19.16
21-AUG-05 to 03-SEP-05	18.5	15.4	16.9	3.7	3.08	3.38	22.2	18.48	20.28
07-AUG-05 to 20-AUG-05	14.8	12.32	13.52	3.7	3.08	3.38	18.5	15.4	16.9
24-JUL-05 to 06-AUG-05	11.1	9.24	10.14	3.7	3.08	3.38	14.8	12.32	13.52
10-JUL-05 to 23-JUL-05	7.4	6.16	6.76	3.7	3.08	3.38	11.1	9.24	10.14
26-JUN-05 to 09-JUL-05	3.7	3.08	3.38	3.7	3.08	3.38	7.4	6.16	6.76

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- **ACCRUAL HISTORY PAY PERIOD** -- provides a listing of historical pay periods in which the employee has received biweekly accrual updates.

- **ACCRUAL HISTORY BEGINNING BALANCE** --displays the biweekly accrual balances the employee has at the beginning the of pay period, before accrual rates are added for the current pay period.

- **ACCRUAL RATES** -- displays the biweekly accrual rate for Vacation, Sick Leave and Personal Holiday earned per pay period.

- **ACCRUAL HISTORY ENDING BALANCE** -- displays the employees new biweekly accrual balances after: accrual rates for the current pay period have been added to the beginning balance and benefit time paid to the employee during the pay period being viewed has been deducted. The balances in this section will become the beginning balance accruals for the next pay period.

7. *Scroll Bars* are provided on the right and bottom of the **ACCRUAL HISTORY** form in order to view additional information.

- The *Right Scroll Bar* allows you to scroll through pay periods per calendar year.

- The *Bottom Scroll Bar* allows you to view the total number of hours the employee worked in a pay period, information on the employee's assignment, and the date the employee's accrual balances were updated.

Pay Period	Hours Worked	Prim Cat	Prim FTE	Total # Assigns	Total FTE	Primary Assignment Organization
13-NOV-05 to 26-NOV-05	81.5	01	1	1		704250000 Food & Nutrition Serv
30-OCT-05 to 12-NOV-05	79.75	01	1	1		704250000 Food & Nutrition Serv
16-OCT-05 to 29-OCT-05	81.5	01	1	1		704250000 Food & Nutrition Serv

Pay Period	Comments	Updated By	Updated Date
13-NOV-05 to 26-NOV-05	dated by Hruab_Absence_Accrual_Pkg	CONTROLM	29-NOV-2005
30-OCT-05 to 12-NOV-05	dated by Hruab_Absence_Accrual_Pkg	CONTROLM	15-NOV-2005
16-OCT-05 to 29-OCT-05	dated by Hruab_Absence_Accrual_Pkg	CONTROLM	01-NOV-2005

Note: The **ACCRUAL HISTORY** form is an *Inquiry* form only, *you will not be able to make changes or update the information*.

8. The information contained in the **ACCRUAL HISTORY** form is exportable. If you choose to export the data, go to **FILE; CLICK EXPORT.**

9. The following box will display while information is being exported.
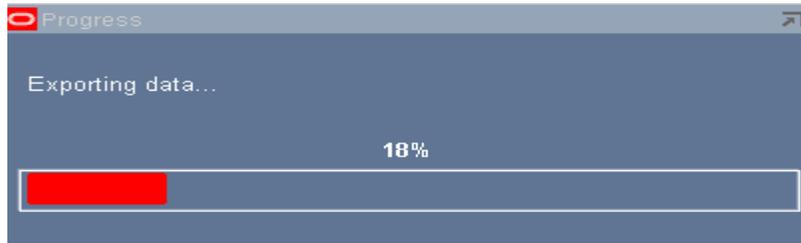
10. Once the data has been exported, the **FILE DOWNLOAD** window will appear. Click on the **SAVE** button.
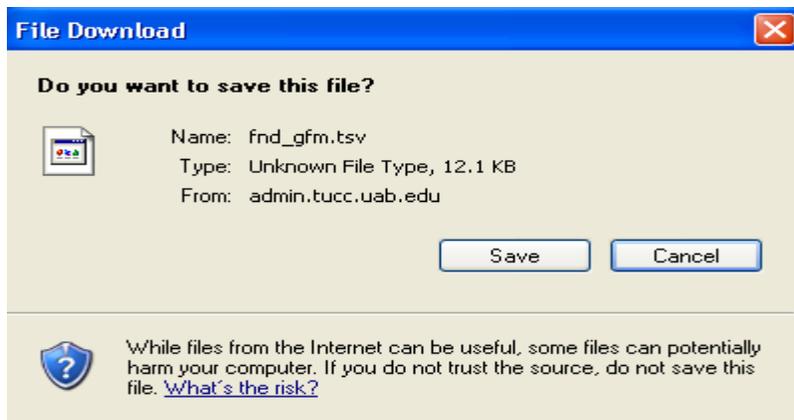
11. After you click on the **SAVE** button, the following window will appear. Your window may have a different folder. You can save this file anywhere on your hard drive or network drive.

12. Before you click on the **SAVE** button, write down the name of the file or rename it. Make sure you also note the folder name. The file extension can stay as a **.tsv** file. Excel and or Access will know how to import the data.

13. Click on the **Save** button.

14. Open Excel or Access. Use **File**, **Open** or the file open icon on the toolbar to open the file. You may have to change **Files of Type** to **All files** in order to locate the document.

15. Excel or Access will open a wizard that will assist you in performing the tab delimited import process.

16. Click **BACK** to return to the **ACCRUAL ACCUMULATOR** Form.

17. If you wish to view a different employee's accrual balance; click on the
FLASHLIGHT located in the toolbar.

18. The **FIND PERSON** window will open; click **CLEAR**.

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