

Attendance - Balance - Adjust

Summary:

Manually adjust employee balances

Problem / Goal:

Alter employee Time-Off balances manually

Solution:

1. On the left, click **Transactions**.
2. Select an employee.
3. At the top Under Transactions, click the tab for the type of Time-Off being adjusted.
4. Click **New**, click **Yes** to the message that pops up about affecting the balance.
5. In the **Edit Transaction** window, enter the following:
 - a. **Transaction Date**.
 - b. **Transaction Type**.
 - c. **Amount** in positive hours, regardless of how you display or accrue the Time-Off.
 - To adjust the balance up, enter an **Adjustment to Earned**. Do Not use the term **Time Earned**. See **Special Note** below.
 - To adjust the balance down, enter an **Adjustment to Used**.

In both cases, be sure to enter the amount in positive hours regardless of whether you display your time in 'Days' or 'Hours'.

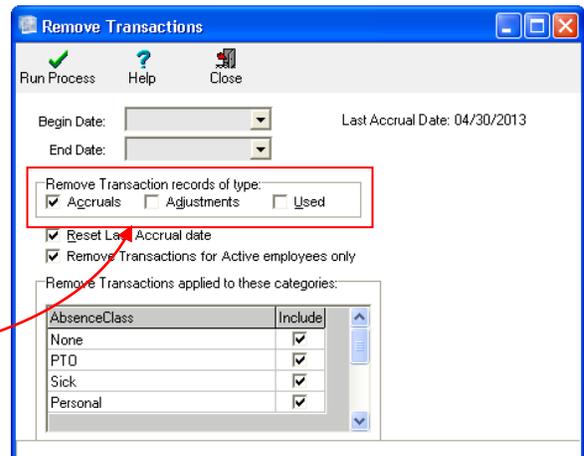
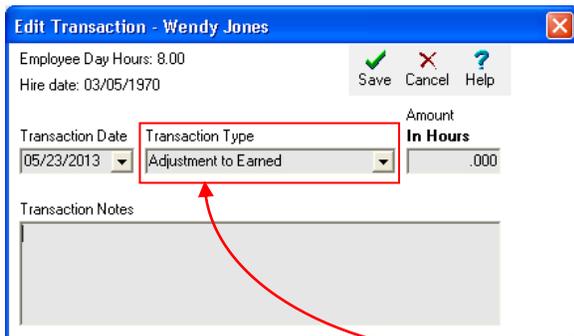
Example: If your Display Mode has been set to **Days** and you need to increase an employee's balance by **two days** and the employee works **8 hours** a day, you would enter an **Adjustment to Earned** of **16 hours**.

- d. Reason for the entry in the **Transaction Notes** field.

Special Note:

If ever you need to remove and re-run Time-Off accruals, you will see that by default, **Adjustments** and **Used** are [not] checked. Any manual transactions entered on the Transaction screen identified as "**Adjustment to Earned**" will [not] be removed. If however, in the first bullet point of step **5c** above you identify a positive adjustment as **Time Earned**, it will disappear later if you remove accruals for a date range that includes the date of that manual entry. This is because any transaction identified as **Time Earned** is considered by the program to be an accrual.

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