

Manage Employee Accruals

Accrual Balances Report

The Accrual Balances report allows you to review all employee accrual data and complete all available accruals actions from one page.

The Accrual Balances report offers a central location to complete all available actions such as changing remaining balances, moving balances, and executing accrual rules.

Access the Accrual Balances Report

Unlike other reports in the solution, the Accrual Balances report does not fall within a Reports section of the menu, but is instead accessed from the Accruals section of the Team tab.

Menu > Team > Accruals > Balances

1. (Optional) From the **Accrual Balances** page, set filters for applicable columns.
2. Select **Run Report** to generate employee accrual data that meets the filtered criteria.

Accrual Balances Report Information

You can view time off accrued, taken, and scheduled for all employees from the Accrual Balances report.

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| Column | Description |
|---|--|
| Hours Earned or Current Accrued | This is the total amount of hours or days earned in the current accrual year. |
| Taken | This is the total amount of hours or days the employee has taken in the current accrual year. This number is consistent with Time Off entries on the employee's previous timesheets. |
| Scheduled | This is the total amount of time the employee has scheduled to take. This number is consistent with Time Off entries on the employee's current and future timesheets. |
| Hours Remaining or Current Balance | This the total amount of time off the employee has remaining after subtracting their Taken time from their Current Accrued time. |

Execute Accrual Rules

You can manually run accrual rules for one employee or multiple employees from the Accrual Balances report.

Menu > Team > Accruals > Balances

1. From the **Accrual Balances** page, select the check boxes for the applicable employees and **Time Off** or **Accrual Category**.
2. Select **Execute Accruals**.
3. From the **Run Accruals** window, define the time period for the selected accrual rules to be executed to.
4. Select **Execute Accruals**.

Modify Employee Accrual Balances

You can edit one employee's or multiple employees' accrual balances from the Accrual Balances report.

Menu > Team > Accruals > Balances

1. Select the check box of the applicable employee or employees whose balances are changing.
2. Select **Change Remaining**. The **Information** window appears.
3. Select the type of change to be made (for example, **Add**).
4. Enter the applicable amount for the change.
5. At the **As Of Date** field, enter the date the change happens.
 1. **Note** The **As Of Date** field may not appear for some company configurations. If the **As Of Date** field is missing, the change occurs immediately.
6. At the **Comment** field, enter a comment explaining the reason for the change.
7. Select **Save**.