![University of Victoria]

Leave reports

This quick guide describes the reports available under the FAST HR Leave tab: *Leave Balances, Year to Date Leave Summary, Leave Details, Leave Approval Status, UVic Leave Calendar Month at a Glance* and *Leave Liability Report*. These custom UVic reports provide current information on all types of employee leave, including vacation, sick and CTO.

If your department is participating in the leave tracking project, the leave reports will display leave information for CUPE, PEA, ME and Exempt Support Staff. If not, the reports will show leave balances for CUPE employees and Exempt Support Staff.

For more resources, including a guide on *FAST HR codes*, visit www.uvic.ca/hr/fasthr.

#	Instructions	Screenshot
1	The **Leave Balances** report displays leave balances by type of leave for each employee. **TIP:** Non-accrued balances (e.g. Jury, Compassionate leave) will display a negative balance if leave is taken.	
2	The **Year to Date Leave Summary** report shows the Carry-over balance, plus hours Accrued and Taken. The current Balance is displayed in the far right column.	
3	You can filter the Year to Date Leave Summary by type. For example, to display only Vacation leave, filter by the code VAC before executing your report.	

Created May 2015.Updated December 2015.

#	Instructions	Screenshot
4	Filtering by the VAC code produces a report that shows vacation balances for each employee.	<table><tr><td>Current Year</td><td>Leave Type</td><td>Carry-over</td><td>Accrued</td><td>Taken</td><td>Balance</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>175.00</td><td>0.00</td><td>175.00</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>175.00</td><td>0.00</td><td>175.00</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>126.00</td><td>66.50</td><td>59.50</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>126.00</td><td>66.50</td><td>59.50</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>175.00</td><td>0.00</td><td>175.00</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>175.00</td><td>0.00</td><td>175.00</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>105.00</td><td>63.00</td><td>42.00</td></tr></table>
5	Click on the hyperlink in the **Taken** column to view details.	<table><tr><td>Current Year</td><td>Leave Type</td><td>Carry-over</td><td>Accrued</td><td>Taken</td><td>Balance</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>126.00</td><td>14.00</td><td>112.00</td></tr><tr><td>2015</td><td>VAC</td><td>108.50</td><td>112.00</td><td>0.00</td><td>220.50</td></tr><tr><td>2015</td><td>VAC</td><td>0.00</td><td>105.00</td><td>0.00</td><td>105.00</td></tr><tr><td>2015</td><td>VAC</td><td>9.00</td><td>105.00</td><td>7.00</td><td>107.00</td></tr><tr><td>2015</td><td>VAC</td><td>5.75</td><td>140.00</td><td>49.00</td><td>96.75</td></tr></table>
6	The details screen shows the number of hours taken plus the date and day of the week.	<table><tr><td>Hours Taken</td><td>Leave Code</td><td>Date Taken</td><td>Year</td><td>Month Taken Sorted</td><td>Month Taken</td><td>Day of Week Sorted</td><td>Day of Week</td></tr><tr><td>7.00</td><td>VAC</td><td>02-JAN-2015</td><td>2015</td><td>1.JAN</td><td>JAN</td><td>5.FRIDAY</td><td>FRIDAY</td></tr><tr><td>7.00</td><td>VAC</td><td>05-JAN-2015</td><td>2015</td><td>1.JAN</td><td>JAN</td><td>1.MONDAY</td><td>MONDAY</td></tr><tr><td>7.00</td><td>VAC</td><td>06-JAN-2015</td><td>2015</td><td>1.JAN</td><td>JAN</td><td>2.TUESDAY</td><td>TUESDAY</td></tr><tr><td>7.00</td><td>VAC</td><td>07-JAN-2015</td><td>2015</td><td>1.JAN</td><td>JAN</td><td>3.WEDNESDAY</td><td>WEDNESDAY</td></tr><tr><td>7.00</td><td>VAC</td><td>08-JAN-2015</td><td>2015</td><td>1.JAN</td><td>JAN</td><td>4.THURSDAY</td><td>THURSDAY</td></tr><tr><td>7.00</td><td>VAC</td><td>09-JAN-2015</td><td>2015</td><td>1.JAN</td><td>JAN</td><td>5.FRIDAY</td><td>FRIDAY</td></tr></table>
7	**TIP:** The Year to Date Summary also provides the hourly rate of pay for each employee. This information may be useful for producing leave liability and other reports.	<table><tr><td>Hourly Rate</td><td>Status</td><td>Current Year</td><td>Leave Type</td><td>Carry-over</td><td>Accrued</td><td>Taken</td><td>Balance</td></tr><tr><td>22.57</td><td>A</td><td>2015</td><td>BANK</td><td>0.00</td><td>0.00</td><td>8.75</td><td>-8.75</td></tr><tr><td>22.57</td><td>A</td><td>2015</td><td>TERM</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr><tr><td>22.57</td><td>A</td><td>2015</td><td>WSO</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr><tr><td>22.57</td><td>A</td><td>2015</td><td>UNI</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr><tr><td>22.57</td><td>A</td><td>2015</td><td>PER</td><td>0.00</td><td>0.00</td><td>0.00</td><td>0.00</td></tr></table>
8	The **Leave Approval Status** report displays the status of leave approvals.	<table><tr><td>Last Name</td><td>First Name</td><td>Position</td><td>Org Code</td><td>Leave Month</td><td>Year</td><td>Report Method</td><td>Report Status</td><td>Hours</td></tr><tr><td>Oyl</td><td>Olive</td><td>994099</td><td>35000</td><td>3</td><td>2015</td><td>Department</td><td>In the Queue</td><td>0</td></tr><tr><td>Jetson</td><td>Jane</td><td>997578</td><td>35000</td><td>3</td><td>2015</td><td>Department</td><td>In the Queue</td><td>0</td></tr><tr><td>Jetson</td><td>Jane</td><td>997578</td><td>35000</td><td>1</td><td>2015</td><td>Department</td><td>Overridden</td><td>21</td></tr><tr><td>Jetson</td><td>Jane</td><td>997578</td><td>35000</td><td>2</td><td>2015</td><td>Department</td><td>In the Queue</td><td>0</td></tr><tr><td>Mermaid</td><td>Ariel</td><td>997910</td><td>35000</td><td>2</td><td>2015</td><td>Department</td><td>In the Queue</td><td>0</td></tr><tr><td>Mermaid</td><td>Ariel</td><td>997910</td><td>35000</td><td>3</td><td>2015</td><td>Department</td><td>In the Queue</td><td>0</td></tr></table> **Not Started** = The employee has not started the monthly report. **In the Queue** = The employee has started the report but not submitted it. **Pending** = The report is waiting for the supervisor's approval. **Overridden** = A proxy has approved on behalf of the assigned approver. **Completed** = The report has been submitted and approved.

#	Instructions	Screenshot
9	You can filter by month to view whether leave approvals have been completed.	*(Data as of 19/05/2015 08:38:39 PM)* **Org Code** Click ⊕ to add values **Leave Month** Click ⊕ to add values 1 2 **3** 4 5 6
10	In the example shown for March 2015 (month 3), four of the leave reports have been started but not completed by the employee (*In the Queue*). One has been submitted by the employee and is waiting for approval from his or her supervisor *(Pending)*.	**Leave Month** | **Year** | **Report Method** | **Report Status** | **Hours** 3 | 2015 | Department | In the Queue | 0 3 | 2015 | Department | In the Queue | 0 3 | 2015 | Department | In the Queue | 0 3 | 2015 | Department | In the Queue | 42 3 | 2015 | Department | Pending | 38.50
11	To view the **UVic Leave Calendar Month at a Glance** report, enter a year and month on the Filter Options page before executing the report.	🔍 Filter Options ❓ Help + More **YEAR** 2015 **MONTHS** Click ⊕ to add values **EMPNO** **TS ORG DESC** Click ⊕ to add values JUN / MAR / MAY / NOV / OCT / **SEP** ● = ○ <>
12	The report displays employee names on the left and days of the month at the top. If an employee has taken leave, a leave code will appear in the corresponding box.	**MONTHS = SEP** Row # | YEAR | EMPNO | NAME ▲ | MON | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 1 | 2015 | V00 | | SEP | | | | | ▫ | ▫ | ▪ | | 2 | 2015 | V00 | | SEP | | | | | ▫ | ▫ | ▪ | | 3 | 2015 | V00 | | SEP | | | | | ▫ | ▫ | ▪ | | 4 | 2015 | V00 | | SEP | | | VA | VA | ▫ | ▫ | ▪ | VA | 5 | 2015 | V00 | | SEP | | | | | ▫ | ▫ | ▪ | | 6 | 2015 | V00 | | SEP | | | | | ▫ | ▫ | ▪ | |
13	A legend of leave codes is available under **Page Notes** at the bottom of the screen.	📝 **Page Notes** The following is a legend of the codes used to track different leaves: VA = Vacation MO = MOD Taken EM = Emergency Leave SP = Special leave SI = Sick OT = OT Earn JR = Jury Duty UN = Union Leave

Created May 2015. Updated December 2015.

#	Instructions	Screenshot
14	**TIP:** The calendar is available for six months into the future. You can view any planned vacation or other leaves that employees have entered in their web leave reports.	**CAUTION:** Leave reports should only be approved by supervisors at the end of each month, as actual leave taken may differ from planned leave.
15	To calculate leave liability for your department, use the **Leave Liability Report**.	Employees Positions Jobs Leave Benefits Earnings setup and YTD Payroll Queries Help Human Resource Repor Leave Balances Add New Alert Leave Liability Report Please review the follow Year to Date Leave Summary Leave Details My Favorite Reports Leave Approval Status Report Name UVIC Leave Calendar Month at a Glance More Info Execute
16	On the **Filter Options** screen, enter a Timesheet Org and a Leave Type (e.g. CTO or VAC).	Timesheet Org 35000 Balance = Liability Amount = Leave Type CTO = <> = <> Clear Filter Options Execute Report
17	The report will calculate outstanding leave liability by multiplying any outstanding leave balances by the employees' hourly rates.	<table><tr><td>35.21</td><td>F</td><td>2015</td><td>CTO</td><td>0.00</td><td>0.00</td><td>0.00</td></tr><tr><td>44.44</td><td>A</td><td>2015</td><td>CTO</td><td>1.00</td><td>14.00</td><td>14.00</td></tr><tr><td>46.56</td><td>A</td><td>2015</td><td>CTO</td><td>0.00</td><td>15.00</td><td>1.00</td></tr><tr><td>33.62</td><td>A</td><td>2015</td><td>CTO</td><td>0.00</td><td>39.48</td><td>5.50</td></tr><tr><td>42.44</td><td>A</td><td>2015</td><td>CTO</td><td>4.50</td><td>1.50</td><td>0.00</td></tr><tr><td>46.56</td><td>A</td><td>2015</td><td>CTO</td><td>0.00</td><td>4.00</td><td>4.00</td></tr><tr><td></td><td></td><td></td><td></td><td>2665.47</td><td>13102.21</td><td>5044.20</td></tr></table>