

## Overriding Leave Balances

This job aid provides step-by-step instructions on how an Absence Partner or HR Partner can override an employee’s leave balances.

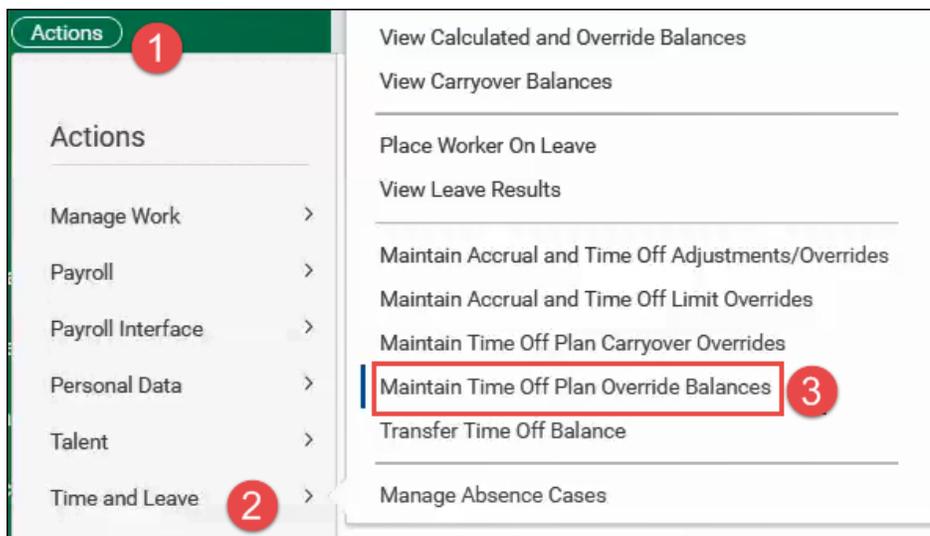


An example of when you might do this is when an employee has multiple bereavement events in a year or when they have additional entitlement hours due to overtime hours worked when a recalculation of hours is warranted.

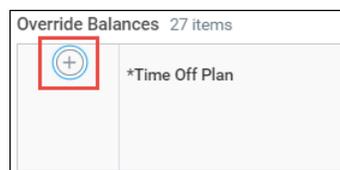
Step 1: In the search bar, type in the employee’s name you are making the change for.

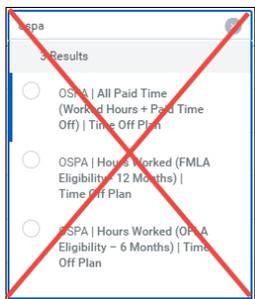
Step 2: The search results will bring you to the landing page on the employee’s profile.

Step 3: Click on **Actions** (1), hover over **Time and Leave** (2), and click on **Maintain Time Off Plan Override Balances** (3).



Step 4: Click on the **Plus (+)** icon to add a new row. You can add multiple rows if adding several different plan types. Example OFLA Hours, OFLA Bereavement, OFLA Sick Child, etc.





Do not use any of the “OSPA | Hours Worked plans.”

**Step 5:** In the *Time Off Plan* box, click on the search prompt and select **Eligible As Of Today**, and then click on the *Time Off Plan* that you’d like to adjust (1). Enter the **Override Balance Date** (date they are able to use hours) (2). You can enter a comment in the **Comment** field (3). Enter the entitlement hours in the **Units** field (4). Repeat Steps 4 and 5 until all Time Off Plans have been added. Click **OK** and **Done**.

*Time Off Plan	*Override Balance Date	Position	Balance Type	Associated Balance Period	Units	Unit of Time	Comment
Family & Medical Leave / OFLA - Bereavement - Time Off Plan <span style="color: red; font-weight: bold;">1</span>	06/01/2019 <span style="color: red; font-weight: bold;">2</span>		Current	01/01/2019 - 12/31/2019 <span style="color: red; font-weight: bold;">4</span>	80	Hours	Used 80 hours in March. Overriding back to 80 due to still having OFLA base hours available. <span style="color: red; font-weight: bold;">3</span>

Type in a key word and hit enter to get a list of options. Example: type “OFLA” to get a list of the plan names that contain the word “OFLA.”

**Step 6:** Navigate to the employee’s calendar and verify the balances reflect what you intended.

**Before**

Family & Medical Leave / OFLA - Bereavement	0 Hours
Family & Medical Leave / OFLA - Hours	292.11 Hours
Family & Medical Leave / OFLA - Military Leave	112 Hours
Family & Medical Leave / OFLA - Parental Leave	292.11 Hours
Family & Medical Leave / OFLA - Pregnancy Disability	485.54 Hours
Family & Medical Leave / OFLA - Sick Child (Additional)	485.54 Hours

**After**

Family & Medical Leave / OFLA - Bereavement	80 Hours
Family & Medical Leave / OFLA - Hours	292.11 Hours
Family & Medical Leave / OFLA - Military Leave	112 Hours
Family & Medical Leave / OFLA - Parental Leave	292.11 Hours
Family & Medical Leave / OFLA - Pregnancy Disability	485.54 Hours
Family & Medical Leave / OFLA - Sick Child (Additional)	485.54 Hours