



Overview: Updates to the Time Away Policy:

As you are aware, the Time Away from Work policy (Policy 6.9) was recently updated, impacting the vacation maximum reset process. Specifically:

- The date by which staff must use vacation days in excess of their maximum accrual limit -- or forfeit them -- changed from June 30 to a new date of October 15th.
- In special circumstances and given the necessary department approval, overages may be either paid out or carried forward via the Workday system.

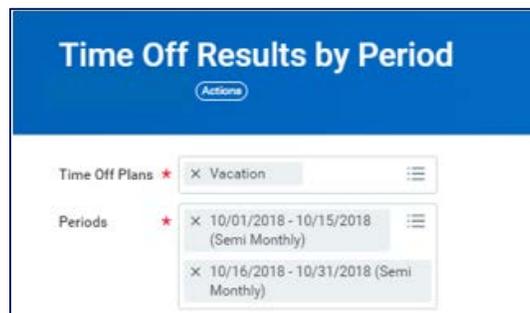
For a more complete review of the policy, please view: [University Policy 6.9, Time Away From Work - Vacation](#).

Exempt Vacation Balances in Workday: What and When

Per Cornell’s Time Away policy, effective October 16, Workday will reset exempt employee vacation balances, as needed, to the allowed maximum accrual. Excess days will move to a ‘Carryover Forfeited’ status. Different from past, the “reset process” is dynamically built into the Workday system.

To better understand the reset process, exempt employees and their supporting roles (Managers, Time Away Partners, Management Partners, and HR Partners) can **View Time Off Results by Period** at any time. To do so:

1. Off the workers related actions, hover over **Time and Leave** and choose **View Time Off Results by Period**.
2. Select both relevant pay periods (10/1/2018 - 10/15/2018 and 10/16/2018 - 10/31/2018), to better understand the impact to exempt vacation balances



3. The results will be shown on a table, and the columns to compare to observe the differences are as follows:

← Time Off Results by Period

To view details drill down on Year to Date values

Periods: 10/16/2018 - 10/31/2018 (Semi Monthly)
10/01/2018 - 10/15/2018 (Semi Monthly)

Time Off Plans: Vacation

Balance Period	Time Off Plan	Unit of Time	Position	Beginning Year Balance	Accrued Year To Date	Time Off Paid Year To Date	Beginning Period Balance	Accrued in Period	Time Off Paid in Period	Carryover Forfeited in Period	Ending Period Balance	Ending Period Balance Including Pending Events
10/01/2018 - 10/15/2018 (Semi Monthly)	Vacation	Days	Administrator	40	19.9992	0	59.1659	0.8333	0	0	59.9992	59.9992
10/16/2018 - 10/31/2018 (Semi Monthly)	Vacation	Days	Administrator	40	0.8333	0	40	0.8333	0	19.9992	40.8333	40.8333

For period 10/1/2018 – 10/15/2018	
Column	What does it show?
Beginning Period Balance	The employee will see their beginning vacation balance.
Accrued in Period	The employee will see their normal pay period accruals.
Carryover Forfeited in Period	No time is forfeited in this period (10/1-10/15).
Ending Period Balance	Ending balance does not reflect new reset maximums.

For period 10/16/2018 – 10/31/2018	
Column	What does it show?
Beginning Period Balance	If an employee has gone over their maximum accrual limits, they will see their capped vacation max (per the policy)**.
Accrued in Period	The employee will see their normal pay period accruals.
Carryover Forfeited in Period	The number of days “cut” or forfeited will be displayed here.
Ending Period Balance	For those impacted, the ending balance will reflect the reset max the accrual for the given pay period.

*** An academic with the Dean’s Max Override identified within the Job Classifications field in Workday, their vacation balance will be reset to 44 days.*

Options: Carrying Forward Vacation Days

In those unique circumstances where a department decides to carry forward excessive vacation days for an employee, either the Management Partners or Time Off Partners can add back the approved days in Workday as follows:

1. Next to the employee’s name, click the Related Actions button, select **Time and Leave > Maintain Accrual and Time Off Adjustments /Overrides**.
2. On the Adjustments tab, click on the button to add a new row.
3. Enter the following values in each of the fields:

Field	Value
Select Accrual/Time Off	Select Vacation Accruals - SM.
Unit	Enter the number of days to either be added to the balance.
Period	Enter the existing pay period.
Reference Date	Leave as defaulted date.
Position	Select the primary position that is receiving the accrual.
Batch ID	Leave blank.
Comment	Enter a comment explaining details of the adjustment (comments are visible by employee).

4. Click OK. A confirmation page displays Next Steps in the process. Typically, the worker’s Manager will have to approve the time off request. (Note: Click the blue arrow icon to expand Details and Process information.)
5. Click Close.

Adjustments		Overrides						
Adjustments 1 Item								
+	*Select Accrual/Time Off	Units	Unit of Time	*Period	*Reference Date	Position	Batch ID	Comment
-	X Vacation Accrual	5	Days	X 10/16/2018 - 10/31/2018 (Semi Monthly)	10/16/2018	X HR Subject Specialist IV		Approved Vacation Carry I

Options: Vacation Cap Payouts

In those unique circumstances where a department decides to pay out excessive vacation days (the overflow) to an employee, either the Management Partner or Time Off Partner can process a vacation payout as follows:

1. Next to the employee's name, click the Related Actions button, select Time and Leave>Enter Time Off.
2. Choose a date within the current pay period. (Note: To ensure the most accurate amount, pick the last day of the pay period to include any newly accrued time prior to the termination.)
3. In Type, select Vacation Cap Payout.
4. In Daily Quantity, enter the approved number of days of the payout. In this example, 5 days.
5. Click Submit. A confirmation page displays Next Steps in the process. Typically, the worker's Manager will have to approve the time off request. (Note: Click the blue arrow icon to expand Details and Process information.)
6. Click Close.

When Wednesday, October 31, 2018

Type * X Vacation Cap Payout

Position * X HR Subject Specialist IV

Daily Quantity * 5

Unit of Time Days

Comment

enter your comment

The Details: FAQs

Please read each question and answer below to understand all of the details of this process:

Q. If an exempt employee requests a vacation day for 10/15 and it is approved by their manager in advance of end of day 10/15, what will happen?

A: Since the system is effective dated and the request is for 10/15, the day will be deducted in the 10/1-10/15 pay period.

Q. If an exempt employee submits a vacation request for 10/15 but initiates it after 10/15, what will happen?

A: Once the day is approved by their manager, the system will deduct the day from their 10/1-10/15 pay period and will adjust any forfeited days accordingly.

Q. If an exempt employee submits a vacation request for 10/15 but it isn't approved until after 10/15, what will happen?

A: Again, once the day is approved by their manager, the system will deduct the day from their 10/1-10/15 pay period and will adjust any forfeited days accordingly.

Q. When does the vacation cap payout need to be processed?

A: If the Vacation Cap Payout is processed prior to 10/16, then there is no need to grant additional days back to the employee.

If the Vacation Cap Payout occurs after 10/16, the Management Partner or Time Off Partner would first need to adjust the employee's balances to reinstate the forfeited days. Next, the Management Partner or Time Off Partner would then process the Vacation Cap Payout.

Q. What is the deadline to adjust exempt employee balances to allow for carry over days?

A: Once the necessary approvals are granted, adjustments to time off balances can occur at any time.

Q. Our Dean has approved some faculty to accrue up to 44 days but it looks like the employees' balances will be cut to 40 days. How can this be fixed?

A: Should you find employees on the report whose balance does not correctly reflect a Dean's Max override (44 days), then Management Partner should initiate an Edit Position to add the **Dean Approved Max** flag to the Job Classification field. If post 10/15, then the Time Off Partner can make the appropriate adjustment to override the balances (if needed).