

Time Off Balance Guide

Document Number: HR-LOA-025 **Effective Date:** January 1, 2020 **Last Updated:** May 1, 2024 **Owner:** People Operations **Applies To:** All employees globally

Purpose

This guide explains how to view, understand, and manage your time off balances in Workday.

Accessing Your Time Off Balance

Via Web

1. Log in to Workday: <https://novatech.workday.com>
2. Click on “Time Off” in the main menu
3. Select “Time Off Balance” to view all balances

Via Mobile App

1. Open Workday app
2. Tap “Time Off” on the home screen
3. Your balance summary appears automatically
4. Tap “View Details” for full breakdown

Understanding Your Balance Summary

Balance Types Displayed

Balance Type	Description
Annual Leave	Regular vacation/PTO balance
Sick Leave	Available sick days
Floating Holiday	Floating holidays remaining
Carryover	Leave carried from previous year
Volunteer Time	VTO hours available
Emergency Leave	Tracks emergency leave used

Balance Details

For each leave type, you'll see:

- **Current Balance:** Available hours right now
- **Scheduled:** Hours already approved for future dates
- **Available After Scheduled:** What remains after pending time off
- **YTD Taken:** Hours used this year
- **Accrued YTD:** Hours earned this year

How Leave Accrues

Monthly Accrual

Most leave types accrue monthly:

- Accrual date: First of each month
- Visible in balance: By 5th of month
- Rate: 1/12 of annual entitlement monthly

Accrual Calculation

Example (20-day annual entitlement):

- Annual entitlement: 160 hours (20 days × 8 hours)
- Monthly accrual: 13.33 hours
- Balance on May 1: ~53.32 hours (4 months)

New Employees

- Accrual starts from your hire date
- First month is prorated based on start date
- Full monthly accrual begins the following month

Leave Balance by Region

United States

Level	Annual Leave	Sick Leave	Floating Holiday
L1-L3	160 hrs (20 days)	80 hrs (10 days)	16 hrs (2 days)
L4-L5	200 hrs (25 days)	80 hrs (10 days)	16 hrs (2 days)
L6+	Unlimited	80 hrs (10 days)	N/A

United Kingdom

All levels: 200 hours (25 days) annual leave + 8 bank holidays

Sick leave: Follows statutory + company enhanced policy

India

All levels: 192 hours (24 days) earned leave + statutory holidays Casual leave: 96 hours (12 days)

Managing Your Balance

Viewing Future Balance

To see what your balance will be on a future date: 1. Go to Time Off > Time Off Balance 2. Click “Balance as of Date” 3. Enter future date 4. View projected balance including accruals

Scheduling Around Your Balance

Before requesting time off: 1. Check “Available After Scheduled” balance 2. Verify requested dates won’t exceed available balance 3. Consider accruals between now and requested dates

Negative Balance Warning

Workday prevents requests that would create negative balance: - If you see this warning, your balance is insufficient - Consider requesting fewer days - Or schedule for after more leave accrues - Contact HR if you need to request leave advance

Carryover Balance

How Carryover Works

- Calculated automatically on January 1
- Up to maximum allowed carries over
- Carryover appears as separate balance line
- Carryover is used before new year balance

Tracking Carryover

1. Navigate to Time Off > Time Off Balance
2. Look for “Carryover” balance type
3. Note: Must be used by March 31 (US/UK)

See Leave Carryover Rules (HR-LOA-011) for details.

Balance Discrepancies

Common Causes

- Pending time off not yet approved
- Recent hire (accrual timing)
- Return from leave (accrual paused)
- Level change (entitlement change)
- Data entry timing

How to Resolve

1. Wait until the 5th of month for accrual to process
2. Check “Accrual History” for detailed records
3. Review pending/scheduled requests
4. If still incorrect, contact HR

Viewing Accrual History

1. Time Off > Time Off Balance
2. Click on specific leave type
3. Select “Accrual History”
4. View all accruals and deductions with dates

Balance Reports for Managers

Team Balances

Managers can view team balances: 1. Team > Time Off > Team Balances 2. View all direct reports’ balances 3. Export to spreadsheet if needed

Using Balance Data

- Encourage employees with high balances to take leave
- Plan for Q4 usage patterns
- Ensure equity in leave approval

Frequently Asked Questions

Q: Why is my balance different than I expected? A: Check pending requests and accrual timing. Balance updates monthly around the 5th.

Q: I was on leave last month - did I still accrue? A: Depends on leave type. Paid leave: yes. Unpaid leave: no. Check accrual history.

Q: Can I borrow against future accruals? A: Up to 5 days advance may be approved. Contact HR.

Q: Why do I have no sick leave balance in January? A: Sick leave doesn't carry over. It resets to full entitlement January 1.

Q: How do I know if I'm using carryover vs. new balance? A: Carryover is used first. Watch carryover balance decrease with your first time off.

Q: My balance shows decimals - is that normal? A: Yes, balances are tracked in hours and may show partial hours from accruals.

Mobile App Tips

Quick Balance Check

- Widget available for iOS/Android home screens
- Shows current balance without login

Request Time Off

- Full functionality available on mobile
- Manager approvals can happen on mobile
- Notifications sent to mobile app

Contact

For balance questions or discrepancies, contact People Operations at leave@novatech.com or via #ask-hr on Slack.

Related Documents: Annual Leave Policy (HR-LOA-001), Leave Carryover Rules (HR-LOA-011), Leave Request Procedures (HR-LOA-010)