

## Leave: Calculate Paid and Record Used (Step 3)

<b>Document #:</b>	3184	<b>Product:</b>	CenterPoint® Payroll
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The Calculate Paid Leave process increases employees Accrued leave hours. The Used leave is documented during the payroll process. Beginning Leave Balances + Accrued - Used + or - Leave Adjustments = Available Leave.

### Prerequisite

All leave setup must be complete prior to calculating paid leave. It is also recommended that beginning leave balances be entered prior to calculating paid leave for the first time. Refer to the Setting Up Leave and Enter Beginning Leave Balances topics for step-by-step instructions.

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[Calculate Paid Leave While Processing Payroll](#)

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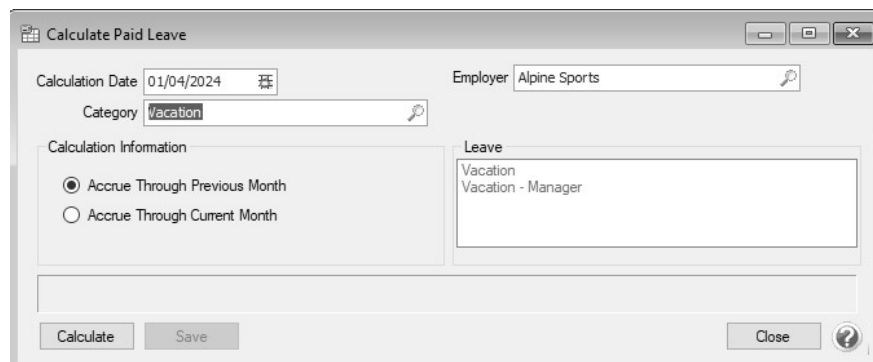
## Calculate Paid Leave:

If leave is assigned a leave category with a Method of Once Yearly, or Once Monthly, needs to be calculated and awarded separate from processing payroll. It is up to the employer to communicate to the employees when leave will be available for them. The Years of Service box is updated on the employee record when paid leave is calculated.

How often you will need to calculate paid leave depends on the setup for your company. For example,

- » If you award leave monthly, you'll need to calculate monthly.
- » If you award leave annually but it's based on the employees anniversary, then you would still need to calculate monthly.
- » If you award leave annually and it's always at the beginning of a calendar year or fiscal year, then paid leave could be calculated just once a year unless you hire new employees during the year.
- » If you award leave annually but it's based on eligibility date (for example date hired), it is acceptable to do it monthly, but then if you calculated on the 1st and an employees anniversary is on the 2nd, they are waiting a whole month to get their new leave. Because of this, in this scenario, calculating at every pay run instead is recommended.

1. Select **Processes > Payroll > Calculate Paid Leave** or **Processes > Calculate Paid Leave**.



2. In the **Calculate Date** box, select the date that you wish to calculate the leave for (usually either at the beginning of the period or the end of the month is used).

3. In the **Employer** box, select the employer you are calculating leave for.
4. In the **Category** box, select the leave category you would like to process paid leave for. All leave tables (Setup > Payroll Details> Leave) that use that category will be displayed in the Leave box.
5. Select whether you want to **Accrue Through the Previous** or the **Current Month**.
6. Click **Calculate**. The grid will display the calculated information sorted by Abbreviation. The default sort order can be changed by clicking on any column heading. The sort order is saved when the screen is closed and displayed when the screen is reopened.

Abbreviation	First Name	Last Name	Leave	Eligibility Date	Years of Service	Year-to-date Hours Accrued	Hours Over Maximum
AppleS	Sam	Apple	Vacation	12/21/21	2.1120	6.6700	0.0000
BerryJ	Jerry	Berry	Vacation - Manag	12/15/08	15.1284	16.6700	0.0000
CedarS	Stacey	Cedar	Vacation - Manag	04/13/17	6.8005	10.0000	0.0000
CottonJ	John	Cottonwood	Vacation - Manag	06/15/98	25.6284	16.6700	0.0000
DouglasJ	Jeanne	Douglas	Vacation - Manag	07/14/12	11.5491	16.6700	0.0000
OakG	Geraldine	Oak	Vacation - Manag	01/01/23	1.0819	6.6700	0.0000
RedwoodT	Tim	Redwood	Vacation - Manag	08/14/14	9.4644	13.3300	0.0000
SapS	Stella	Sap	Vacation	08/15/20	3.4617	6.6700	0.0000
SpruceJ	Joanne	Spruce	Vacation	09/30/17	6.3360	10.0000	0.0000

7. All employees will be selected for the paid leave calculation by default. If you do not want to calculate paid leave for all employees, click the check mark in the column header and then select which employee(s) you want to calculate paid leave for. To reselect all employees, click the check mark column header again.
8. Review the calculated information and click **Save** to add the new accrued hours to the employee's record. The sort order is saved and will redisplay when the screen is opened again.

## Calculate Paid Leave While Processing Payroll

If the Method assigned to a leave category is Fixed Rate or Hours, then paid leave can be calculated/awarded while processing payroll or as a separate process. Follow the steps below to calculate paid leave while processing payroll.

1. Verify that the **Method** on the leave category is set to **Fixed Rate** or **Hours** and the **Calculate on Pay Run** box is selected (Setup > Payroll Details > Leave Categories).
2. While processing payroll (Processes > Payroll > Pay Employees), verify that the **6. Print Checks** tab has the **Accrue Leave** box selected prior to clicking Print & Post.

- Once the check printing and posting process is complete, the **Calculate Paid Leave** screen will be displayed automatically. Follow steps 2-6 from above to complete the process.

## Record Used Leave

Leave that is used by employees is recorded while processing payroll.

- While processing payroll (Processes > Payroll > Pay Employees), use the appropriate leave earnings on the Enter Pay tab to specify the number of leave hours an employee used during that time period.



Note: The amount of available leave time is displayed in the lower left corner of the Pay Employees screen. The used column in that area represents the amount of leave used during this pay run.

The screenshot shows the 'Pay Employees' window. On the left, there's a list of employees: Joanne A Spruce, John Q Cottonwood, Sam J Apple, Stacey C Cedar, Stella S Sap, Ted W Maple, and Tim X Redwood. Below this list is a 'Leave Available' table:

Leave	Available	Used
Paid Time Off	103.10	8.00
Vacation	48.00	32.00

On the right side, there's a 'Regular Earnings' table:

Earning	Hours	Rate
Commissions	0.00	0.00
Hourly Pay	40.00	15.00
Paid Time Off - Hourly Pay	8.00	15.00
Vacation - Hourly Pay	32.00	15.00

At the bottom, there are buttons for 'Calculate', 'Recall', 'Options', 'Save', 'Cancel', and 'Close'.

- Continue processing payroll as you normally would. When the pay run is posted, the amount of leave used during the pay run will automatically be added to the Used hours and deducted from the employees Available hours.



Note: You can view the current status of leave for an employee from the employee record under Setup > Employees > Leave tab. Hours accrued and used can also be printed on the pay stub. The Employee Leave History report (Reports > Reports > Payroll Data Reports > Leave) can be used to verify the historical leave transactions posted to an employee.