

## flexPTO Balances in WFM, Workday and Kronos

This document is a guide for you, as an employee, to assist in planning time off. Knowing how WFM, Workday and Kronos work together is key to understanding **WFM balance allotments for benefited time**.

### WFM is the System for **Requesting Time Off**

1. WFM maintains employees' current and projected flexPTO balances.
2. Employees submit time off using the leave request form, indicating how they want to be paid for their time away.
3. Approved flexPTO hours are deducted from employee's flexPTO or SICK balance in WFM to cover the approved date(s).
4. Overnight, the approved hours will be sent to Workday. Workday will send this information to Kronos for non-exempt (hourly) employees.
5. Areas that are closed on VUMC designated holidays are flagged in WFM as closed and the hours scheduled will be deducted from the flex PTO balance for that date. These hours are sent to Workday, which will send to Kronos. Future deductions can be viewed in WFM through the Balance Report (*see instructions on how to run this report on page 2*).

### Kronos is the System for **Reporting Time Off for Non-exempt (hourly) Employees**

In addition to approved time off in WFM, unplanned book-offs for absences or voluntary cancellation are included in the time off integration. Which means the hours booked off to ABS (absent) or Cancelled Voluntary are immediately deducted from your flexPTO or SICK balance WFM and sent to Workday overnight, which then sends the information to Kronos. Updates made in Kronos are sent to WFM weekly, on Tuesday night. See WFM Time Codes lists for all timecodes, and which are sent to Workday and then Kronos for hourly, non-exempt employees.

### Workday is the System of Record for the Hours Currently Available

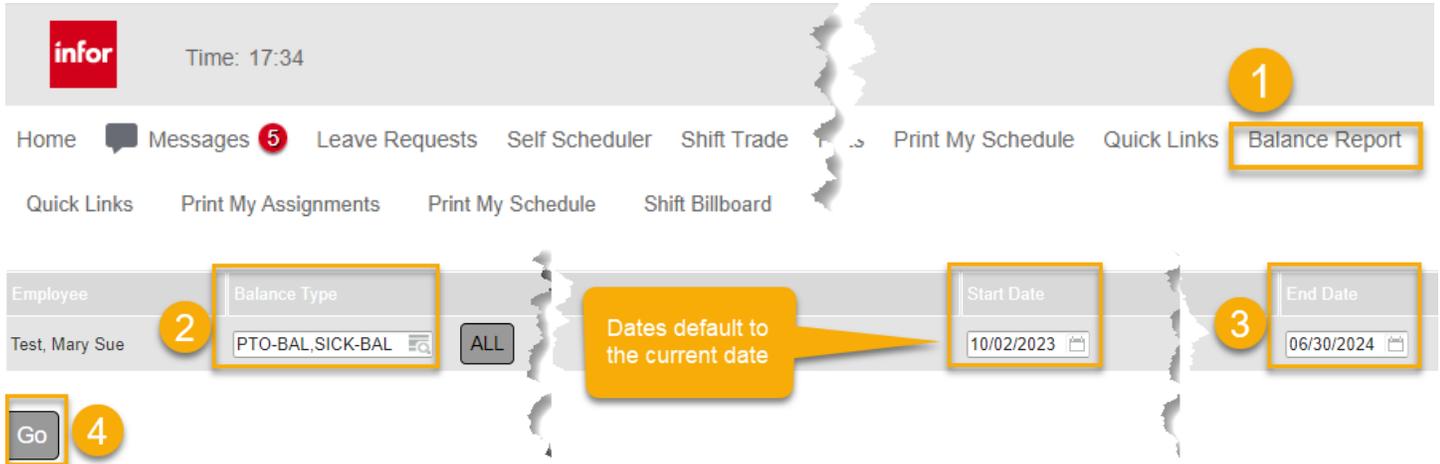
1. Employees can log into **Workday** to view their time off balances.
2. To view your balance, including future planned time, select "Balance as of Date" as June 30 of the current fiscal year.
3. All book offs must be in WFM by the end of the pay period to ensure they are sent to Workday and Kronos.

### Why do the balances match sometimes and other times they do not?

1. Any balance discrepancies between WFM, Workday, and Kronos will be updated with the weekly reconciliation to WFM on Tuesday night.
2. As we mentioned above, updates in WFM are sent to Workday daily, which are then sent to Kronos daily. However, if you make a change in Kronos (removing or adding benefited hours), that data is sent to Workday daily, but only sent to WFM once a week on Tuesday night.
3. How do the discrepancies happen? Example: You have 12 hours approved flexPTO for Monday, but on Wednesday you signed up for a shift later in the week. Since you no longer need to use 12 hours of your flexPTO, in Kronos you removed the 12 flexPTO hours.
4. Results from above example: If you run the balance report in WFM it will show the 12 hours deducted. The following Tuesday night when the change you made in Kronos is sent to WFM, the 12 hours not used will be added back to your flexPTO balance, with Tuesday's date. Please note, the date for the adjustment will always show Tuesday as the adjusted date. The same applies if you used additional hours of PTO or SICK time. The hours entered in Kronos will be sent to WFM on the Tuesday night following the adjustment, listing the adjustment date as Tuesday.

**How to view your balances in WFM by running the Balance Report**

1. Log into the WFM Employee Self Service and select Balance Report from the links at the top of the page.
2. A parameter page displays to run the report. Use the lookup icon in the 'Balance Type' field and check the box next to PTO-BAL and SICK-BAL (*you can also just select PTO*).
3. The start date and end date default to the current date. To see your future balances, change the end date to June 30 of the fiscal year that you want to view.
4. Select Go, located below the parameters.



The screenshot below is an example of the report. You will only change the start date if you are looking for past updates. The start date was changed to 09/17/2023 so you could see an update. The manual adjustment on 09/26/23 by HR, where 24 hours was added back to the WFM PTO balance. Mary Sue did not need to use the approved 24 hours for 9/18 & 9/19, so she cancelled it in Kronos. If she had cancelled the approved dates in WFM, the hours would have immediately been added back to her PTO balance. Since it was cancelled in Kronos, the adjustment was sent to WFM on the following Tuesday night, 9/26/2023. *NOTE: Employees who work in areas that are marked as closed on VUMC recognized holidays will see the scheduled hours, up to one year in advance, subtracted from their PTO balance.*

Test, Mary Sue	PTO-BAL	09/17/2023	INITIAL BALANCE	171.98 HOURS	
		<a href="#">09/18/2023</a>	-12.00 HOURS	159.98 HOURS	
		<a href="#">09/19/2023</a>	-12.00 HOURS	147.98 HOURS	
		<a href="#">Manual Adjustment (SET) 09/26/2023</a>	24.00 HOURS	171.98 HOURS	Created by HR refresh
		<a href="#">11/17/2023</a>	-12.00 HOURS	159.98 HOURS	
		<a href="#">01/08/2024</a>	-12.00 HOURS	147.98 HOURS	
		<a href="#">01/09/2024</a>	-12.00 HOURS	135.98 HOURS	
		<a href="#">01/10/2024</a>	-12.00 HOURS	123.98 HOURS	
		<a href="#">01/15/2024</a>	-12.00 HOURS	111.98 HOURS	
		<a href="#">01/16/2024</a>	-12.00 HOURS	99.98 HOURS	
		06/30/2024	FINAL BALANCE	99.98 HOURS	
Test, Mary Sue	SICK-BAL	09/17/2023	INITIAL BALANCE	60.36 HOURS	
		06/30/2024	FINAL BALANCE	60.36 HOURS	