Viewing Potentially Forfeited PTO in Workday

Audience: Staff Members

Process Overview
Utilize Workday to locate and avoid potentially forfeiting PTO.

For more information on how to request time off in Workday, please see the Request Time Off System Guide [pdf].

Process Steps
1. To find the PTO Balance that would normally be forfeited to the Reserve Sick Bank, log into Workday.
2. From the Workday homepage, click the Time Off worklet in the Your Top Apps section. (Click View All Apps if it is missing).
3. Under the View section, select Time Off Balance.
4. Then select the Balance as of Date based on the PTO Anniversary Date, which is the first of the month after the hire date (unless the hire date is the first of the month) and click OK.

For example: if the hire date is March 19, the PTO Anniversary Date is April 1 or if the hire date is April 1, the PTO Anniversary Date is April 1.
5. If there is a PTO balance that is forfeited to the Reserve Sick Bank, there will be a balance of time located in the **Carryover Forfeited in Period** column. The balance in **Carryover Forfeited in Period** will be moved back to the PTO plan for future use during the exception period.

**Note:** Affected PTO not used by a staff member’s PTO anniversary date subsequent to December 31, 2022, will be converted back to the staff member’s bank of RSD after that PTO anniversary date.

<table>
<thead>
<tr>
<th>Time Off Plan</th>
<th>Unit of Time</th>
<th>Beginning Year Balance</th>
<th>Accrued Year To Date</th>
<th>Time Off Paid Year To Date</th>
<th>Beginning Period Balance</th>
<th>Accrued In Period</th>
<th>Time Off Paid In Period</th>
<th>Carryover Forfeited in Period</th>
<th>Ending Period Balance Including Pending Events</th>
<th>As of Period</th>
</tr>
</thead>
</table>