

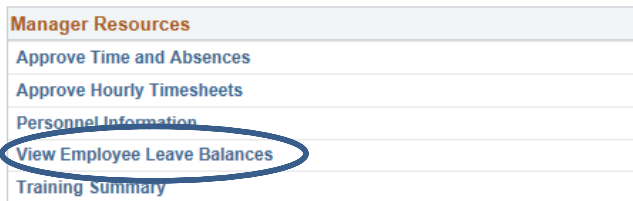
Managers | Manager Balance Inquiry

This step-by-step guide will show Managers how to view balances of direct reports using Manager Self Service in PeopleSoft ([MyCSUSM](#)).

Manager Balance Inquiry

View balance inquiry for your direct reports.

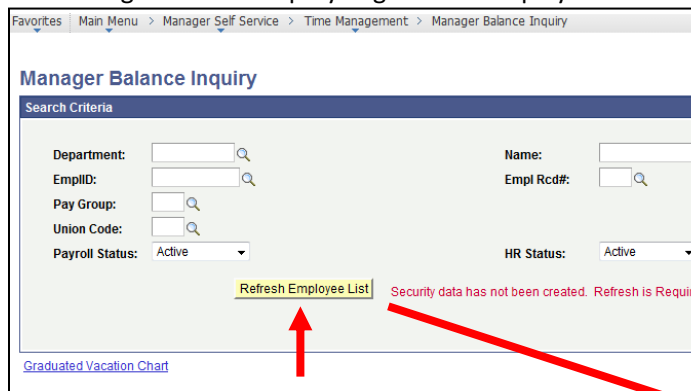
1. To navigate through Manager Self Service to view **Manager Balance Inquiry**, use your web browser to sign into the campus portal, [MyCSUSM](#).
2. There are two options that will navigate to the same page:
 - A. Direct Link: In the Manager Resources box, click on the link titled **“View Employee Leave Balances”**



- B. Full Navigation: *Main menu > Manager Self Service > Time Management > Manager Balance Inquiry*



3. The Manager Balance Inquiry Page should display:

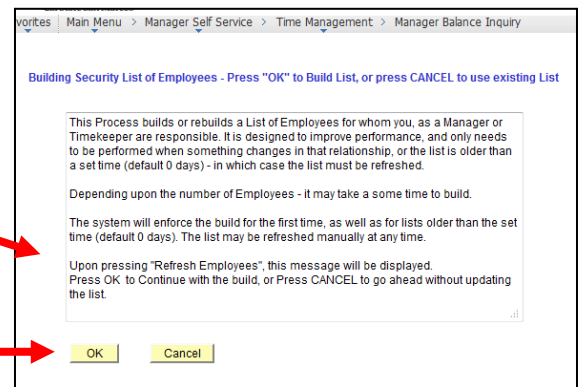


The screenshot shows the 'Manager Balance Inquiry' page with search criteria: Department, EmplID, Pay Group, Union Code, Payroll Status (Active), Name, Empl Rcd#, and HR Status (Active). A red arrow points to the 'Refresh Employee List' button. A red arrow also points from the 'Refresh Employee List' button to a message box on the right.

- a. If this is your first time accessing this page, Click on the **“Refresh Employee List”** button to build a security list of Employees (whom report to you).

- You will be prompted to grant the refresh. **Click OK.**

- You should see the **“search”** and **“clear”** button display now, from the build.



- b. If you are returning, it is recommended to click on the “Refresh Employee List” each time, to generate the most update list of employees whom report to you.
4. Use any of the fields to search for employee(s).
**Please note: Only your direct reports will show. If you attempt to search for an employee that does not report to you, nothing will return.*

Manager Balance Inquiry

Search Criteria

Department: Name:
 EmpID: Empl Rcd#:
 Pay Group:
 Union Code:
 Payroll Status: Active HR Status: Active

Last Refresh was: 02/12/13

Last Finalized Balances for Employees Administered
by Ellen Cardoso

Name	Payroll Status	EmplID	Empl Rcd #	Department	Union Code	Last Finalized Period	Balances as of Date	Sick Balance	Vacation Balance	Personal Holiday Available	Details
Employee Name	Active	000038698	0	1064	M80 CONVERSION	01/02/2013	122,000	330,000	1		

[Graduated Vacation Chart](#)

5. Balance Inquiry displays similar to Employee’s Balance Inquiry view.
 - a. Click on the Details Icon on the far right to see history of leave usage.
 - b. On the far left is the Hierarchy/Drill down icon, which allows access to view balances for employees of your direct reports.
6. You have successfully viewed your direct report absence balances.

If you need assistance, please call Payroll Services at ext. 4421.