501 TA362

Time and Attendance Employee Self Service

Web Based Training

Rev 11/21/2019

Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.

Course Objectives

After completing this course, you will be able to:

- Navigate to Cardinal HCM and the Timesheet page
- Enter and submit regular and overtime hours on the timesheet
- View compensatory leave and overtime leave on the timesheet
- View current Absence Entitlement Balances
- Enter and submit Absence Requests
- Adjust Absence Requests

Course Objectives (continued)

- Understand the reasons for timesheet exceptions
- Make timesheet adjustments

Agenda

1. Understanding Time and Attendance
2. Navigating in Time and Attendance
3. Entering and Viewing Time and Holidays
4. Viewing Absence Balances and Entering Absence Requests
5. Timesheet Exceptions and Adjustments

Lesson 1: Introduction

1 Understanding Time and Attendance

This lesson covers the following topics:

- Time and Attendance Overview
- Key Concepts
- Time and Attendance Process

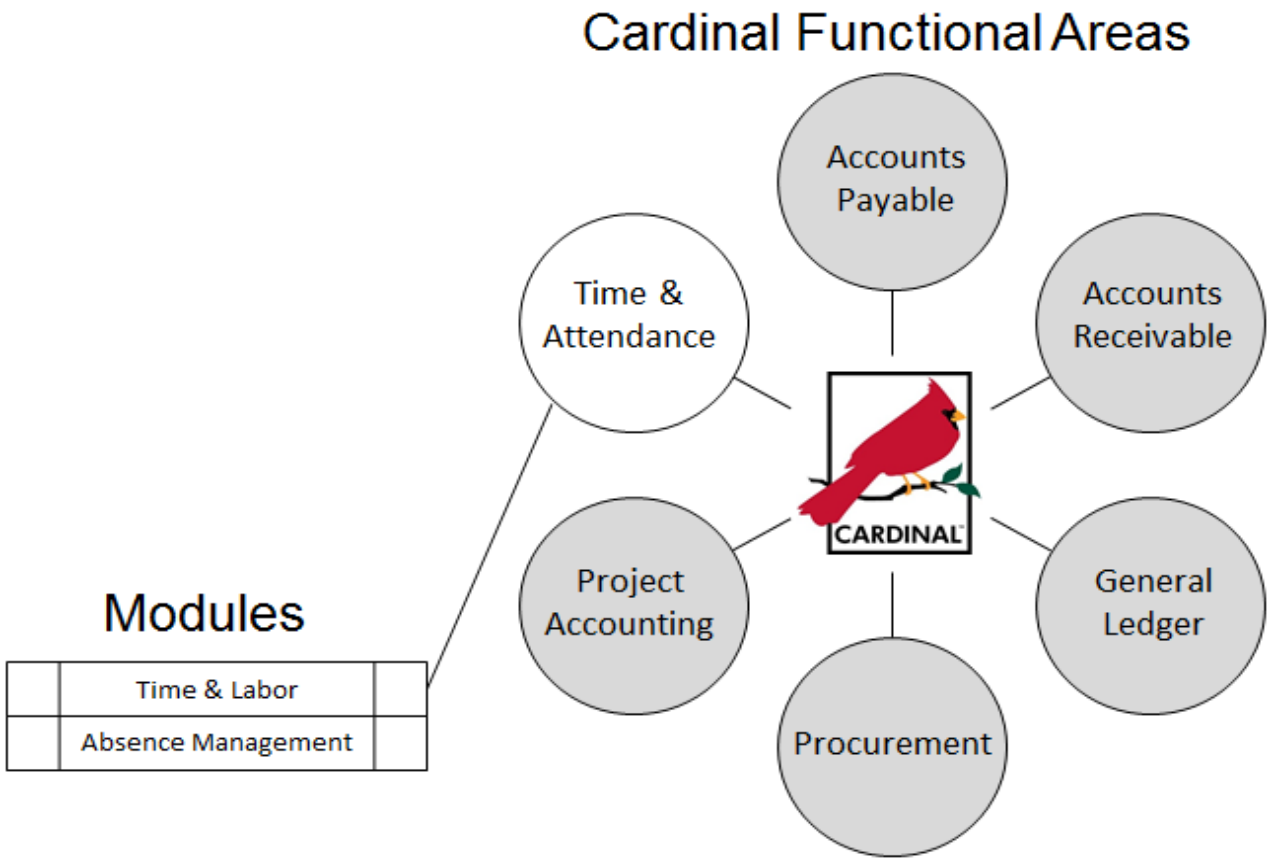
Time and Attendance Overview

The Time and Attendance functional area is composed of two modules:

Time and Labor
The Time and Labor module processes time and absences entered on the timesheet.

Absence Management
The Absence Management module processes absence requests.

This course covers entering time and absences.



Key Concepts

Key concepts in Time and Attendance Employee Self Service include:

- Cardinal has two applications: FIN (financials) and HCM (Human Capital Management). Time and Attendance is housed in the HCM application.

- Time and Attendance is used to capture both productive (hours worked) and non-productive (absences) time for both salaried and hourly employees.

- Employee hours (both productive and non-productive) are charged to Time Reporting Codes and accounting distributions that classify labor costs. Time Reporting Codes are used to classify timesheet hours, e.g., RGS (Regular), EOT (Emergency Overtime), CPE (Compensatory time earned), etc.

- Every employee has a work schedule in Cardinal. Hourly employees have a work schedule with zero hours.

- Absence requests are entered on the Timesheet page. Most absences require you to forecast leave balances. Forecasting is a process that determines if you had or will have sufficient available balance to cover the absence at the time of the absence. The calculation is based on existing balance, expected accruals, and other saved or submitted absences already entered up through the absence date being forecasted.

Key Concepts (continued)

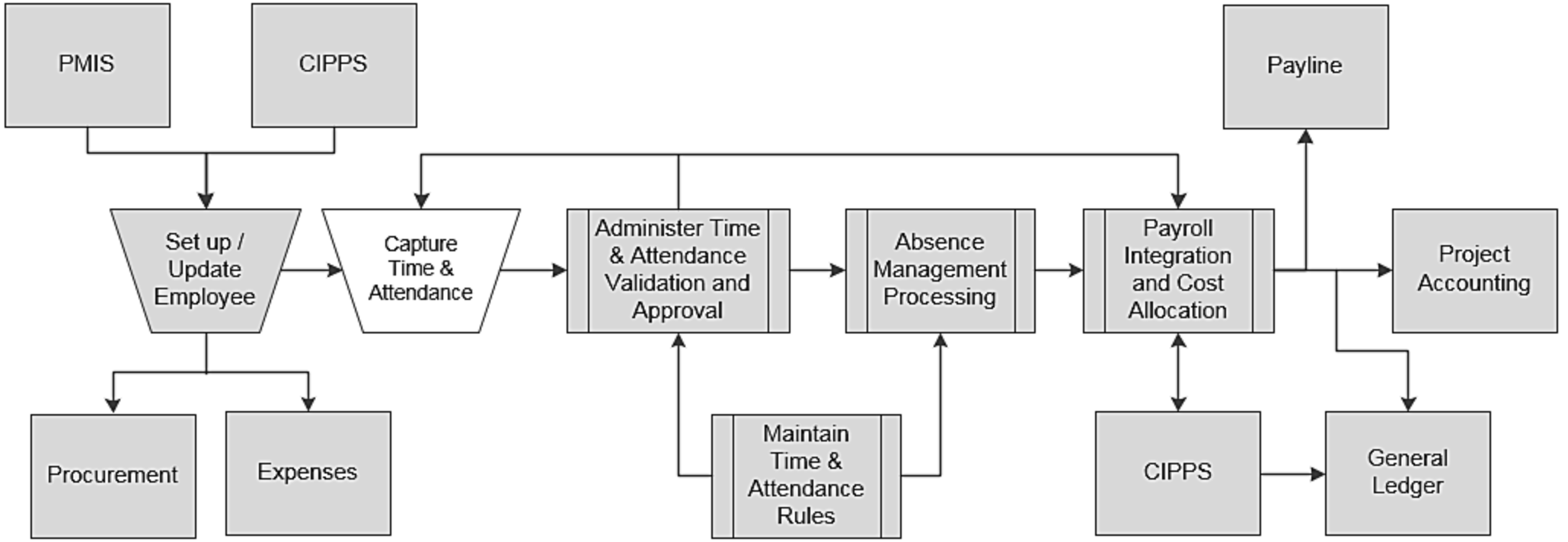
- Time Administration is a batch process in Cardinal that validates submitted time against time reporting rules. It identifies exceptions (warnings or errors) for submitted time that does not meet defined business rules.

- Adjustments to time and absences can be made going back up to six pay periods, but not before the beginning of the current fiscal year.

Time and Attendance Process

The diagram below provides an overview of the Time and Attendance process. For additional detail, refer to the Time and Attendance section of the Appendix of this course.

As a self service user, this course will focus on the **Capture Time and Attendance** area.



Lesson 1: Summary

1 Understanding Time and Attendance

In this lesson, you learned:

- The Time and Attendance process
- Time and Attendance key concepts

Lesson 2: Introduction

2 Navigating in Time and Attendance

This lesson covers the following topics:

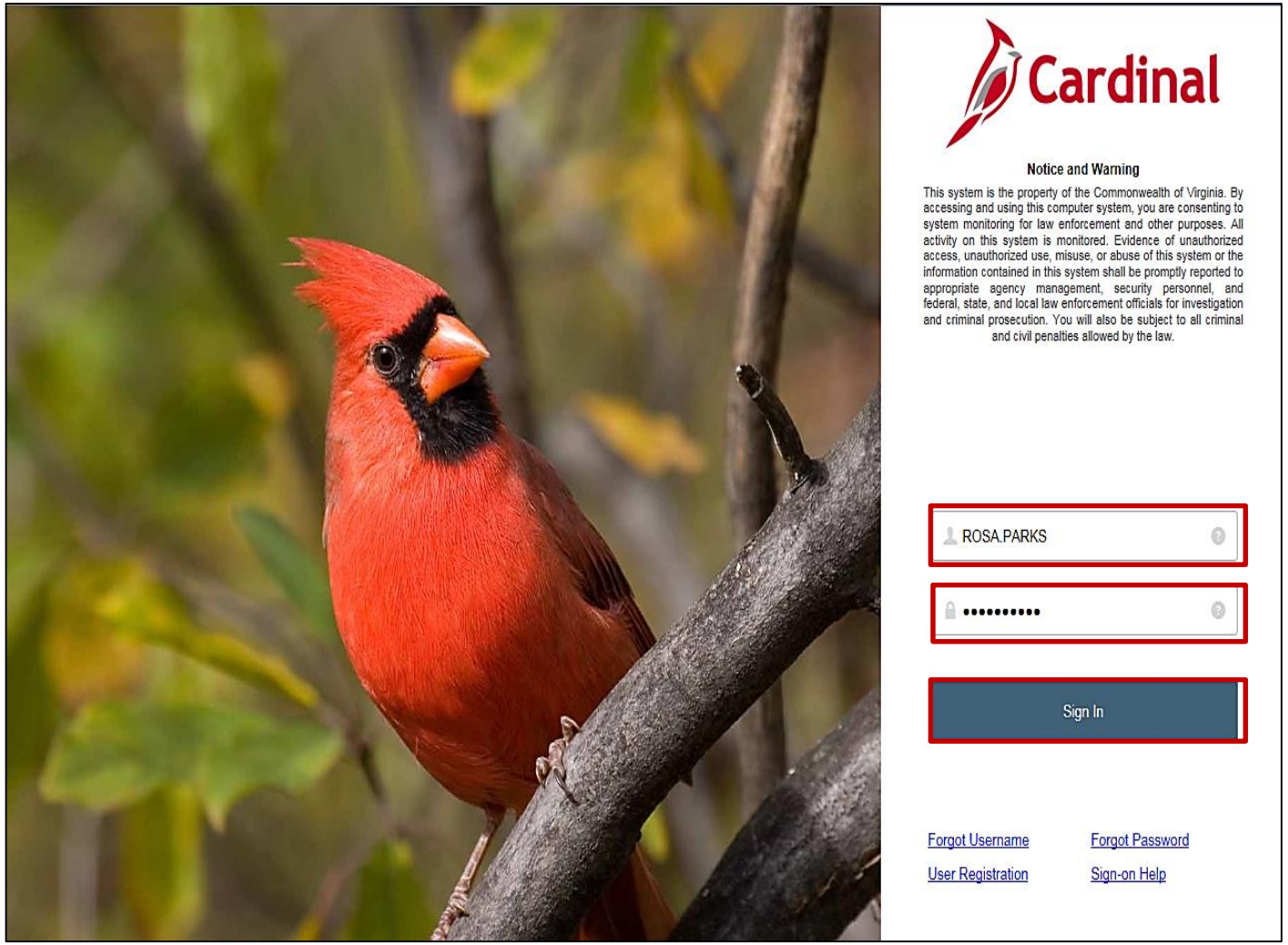
- Navigating to Time and Attendance
- Accessing the Timesheet page
- Reviewing the Timesheet page layout

Navigating in Time and Attendance

To access Cardinal go to:
my.cardinal.virginia.gov

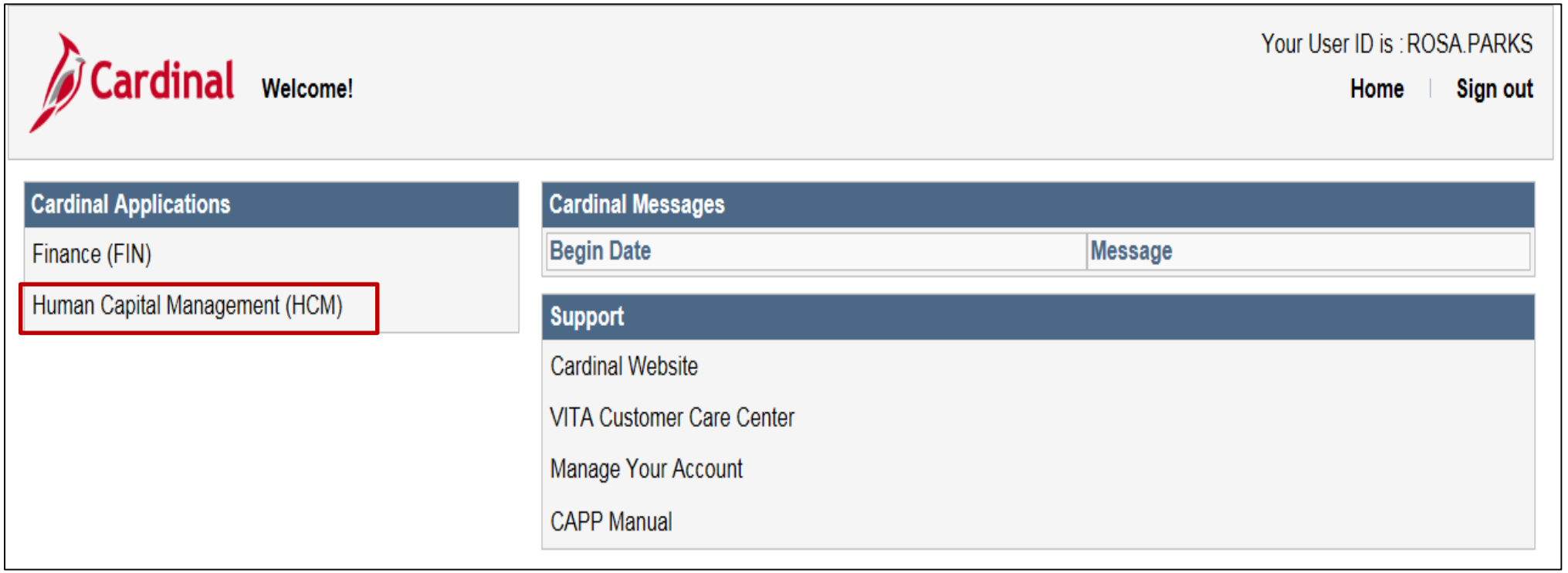
The **Cardinal Login** page displays:

- Enter your **Cardinal Username**
- Enter your **Password**
- Click the **Sign In** button.



Navigating in Time and Attendance

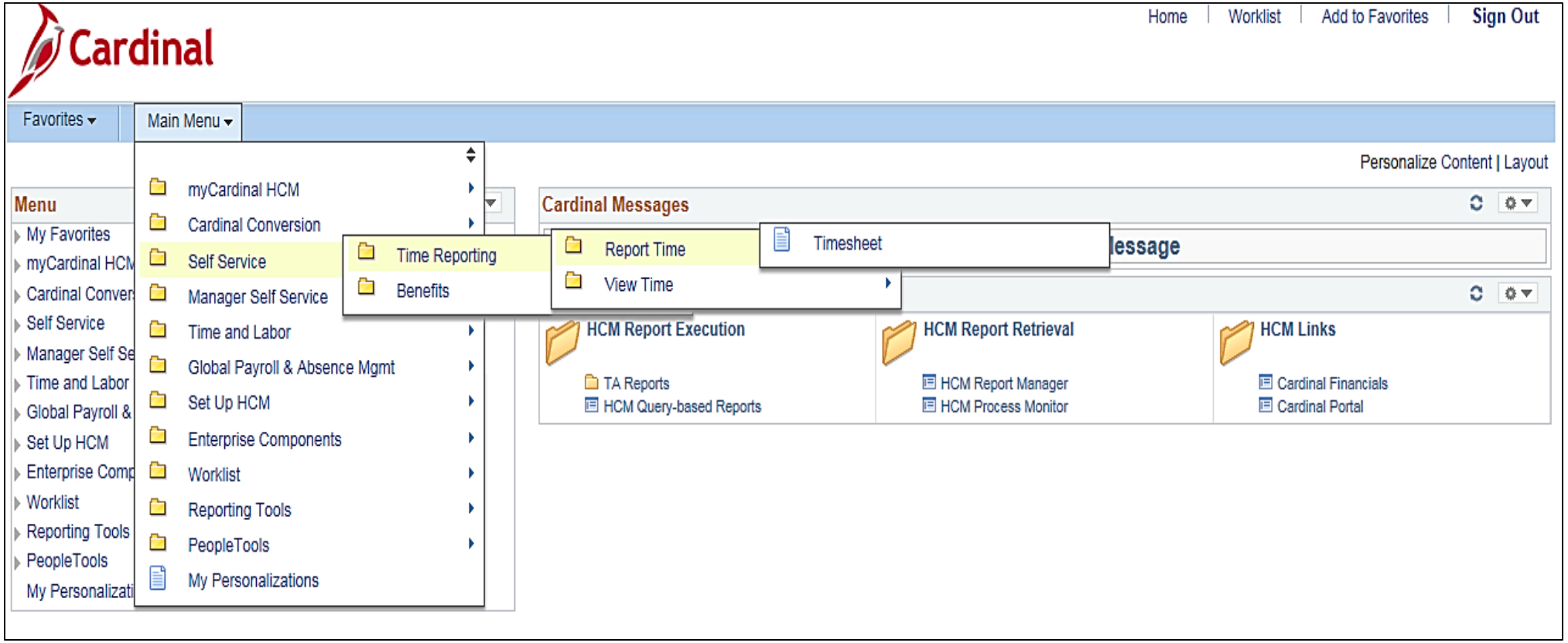
The **Cardinal Portal** page displays. Click the **Human Capital Management (HCM)** link



Accessing the Timesheet Page

From the **Cardinal HCM Home** page, navigate to the **Timesheet** page using the following path:

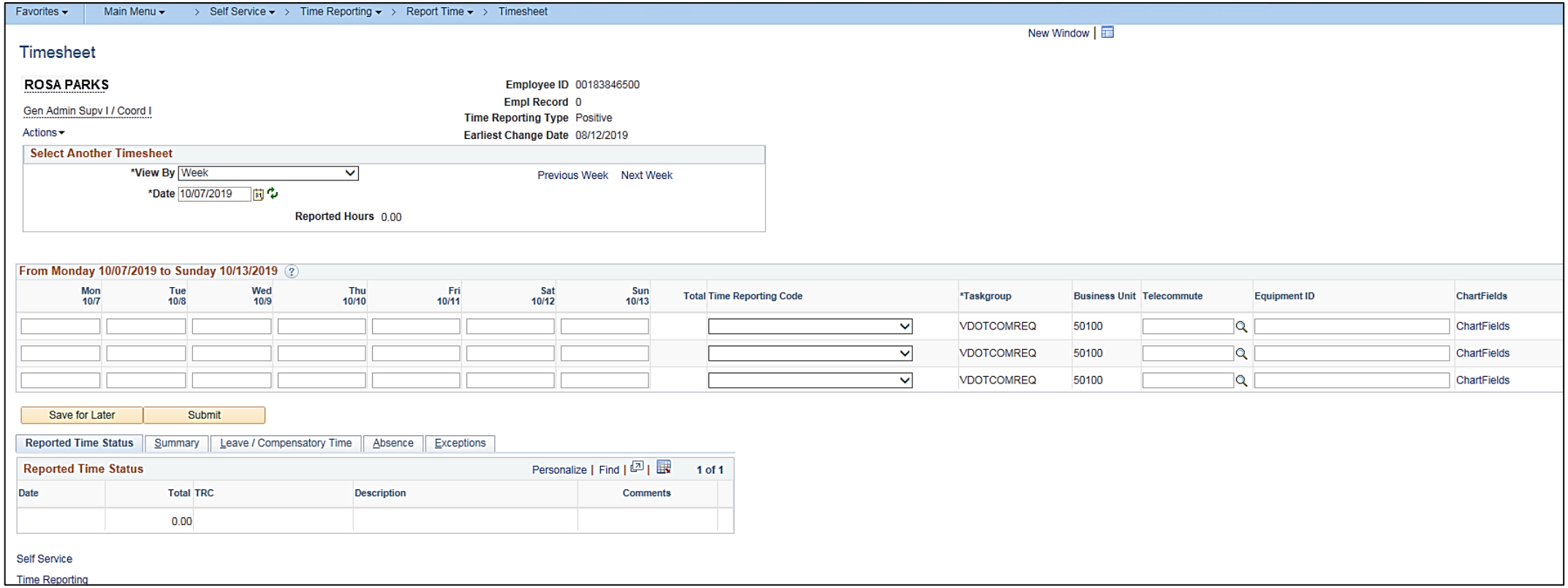
Main Menu > Self Service > Time Reporting > Report Time > Timesheet



Timesheet Page

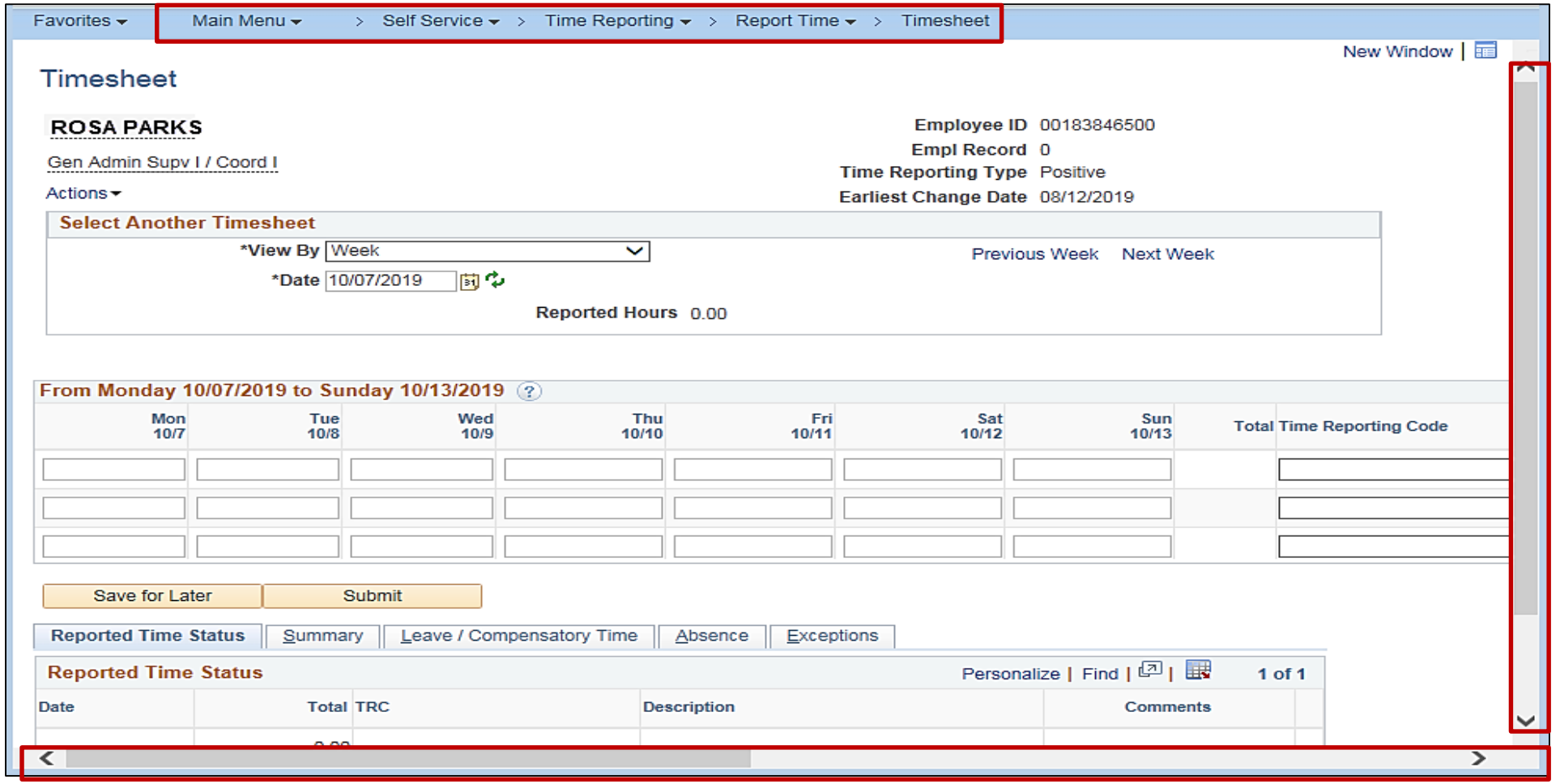
The **Timesheet** page is your one-stop location to view and manage time. Navigate to this page using the following path:

Main Menu > Self Service > Time Reporting > Report Time > Timesheet



Navigation Path and Scroll Bars

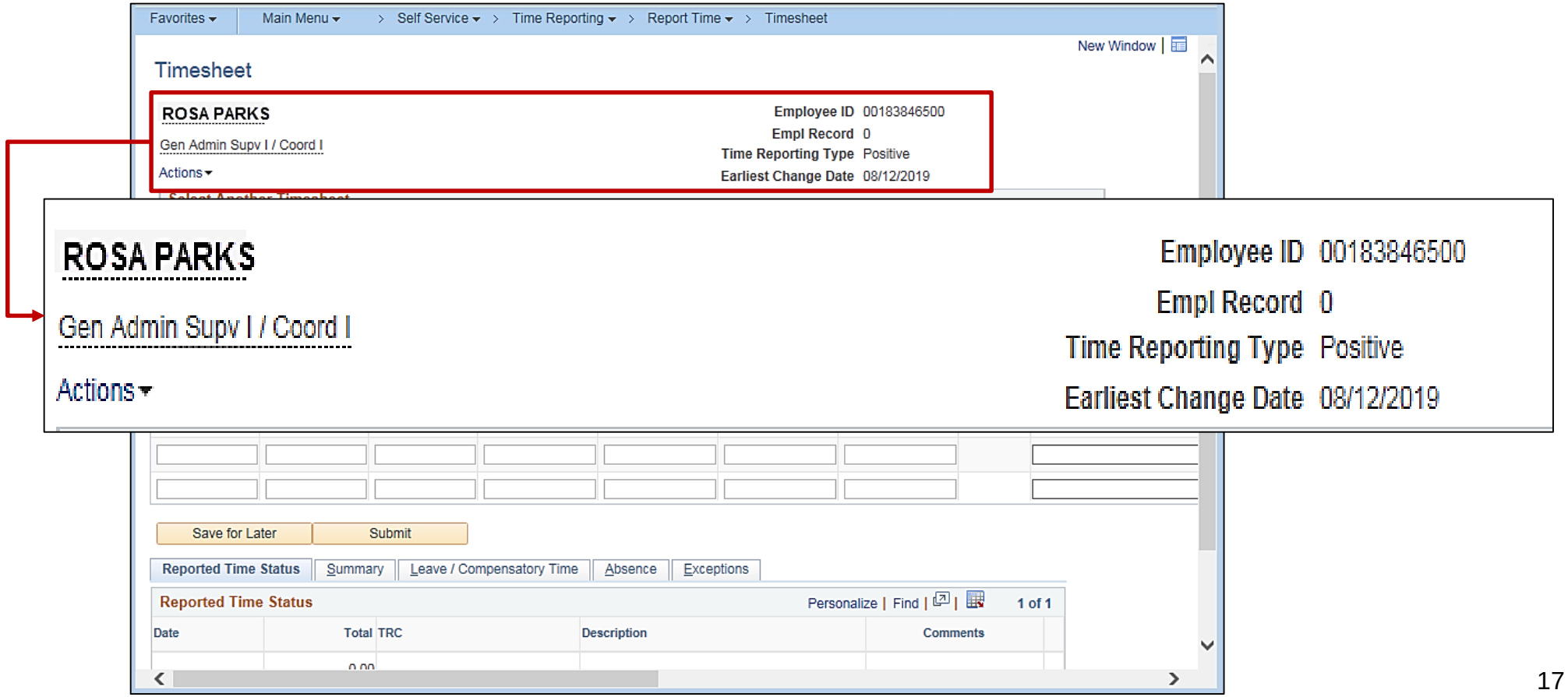
Breadcrumbs at the top of each page show you the navigation path for that page. The scroll bars to the right and bottom of the page allow you to view data that extends beyond the width or length of the screen.



Header Section

The **Header Section** identifies the employee by **Name**, **Employee ID**, **Job Title**, **Employee Record**, and **Time Reporter Type**.

Empl Record field: defaults to 0 for your primary job. If you have another job within the state, then the Record for the additional job will increment by 1.

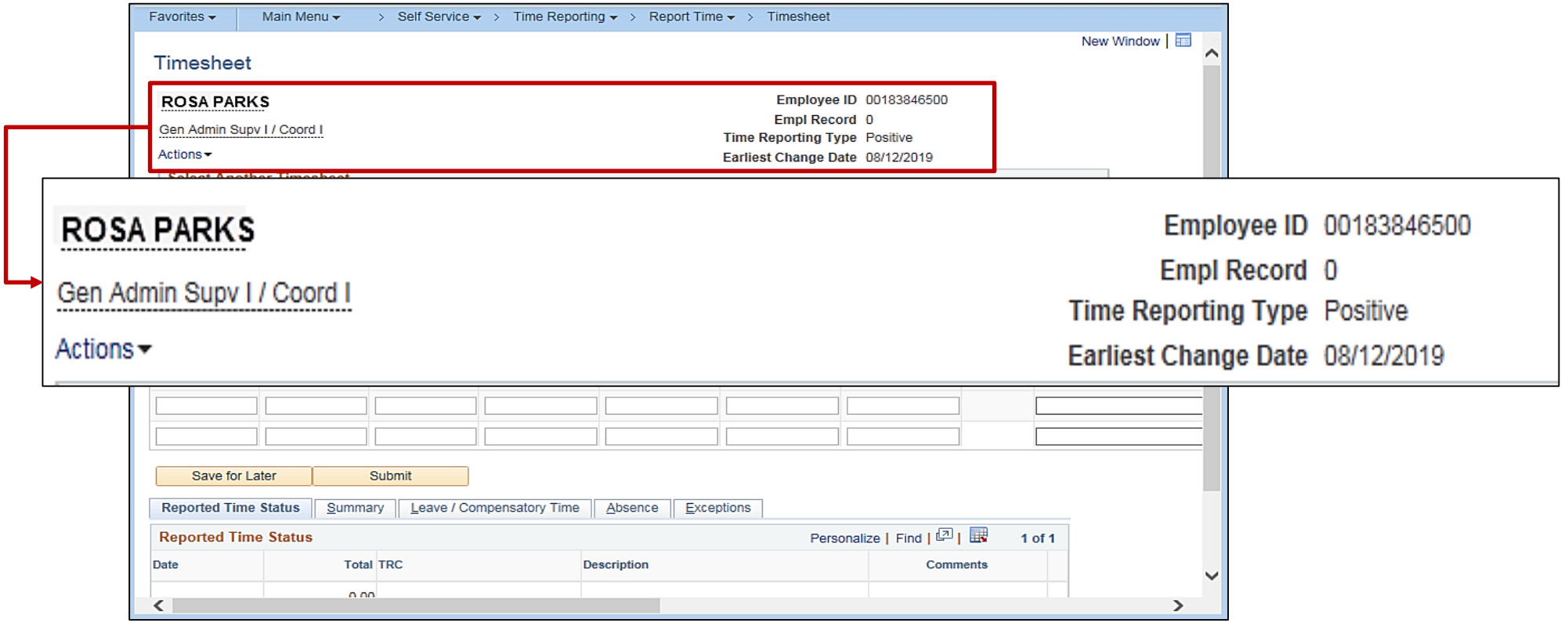


Header Section

Time Reporting Type field has two values configured:

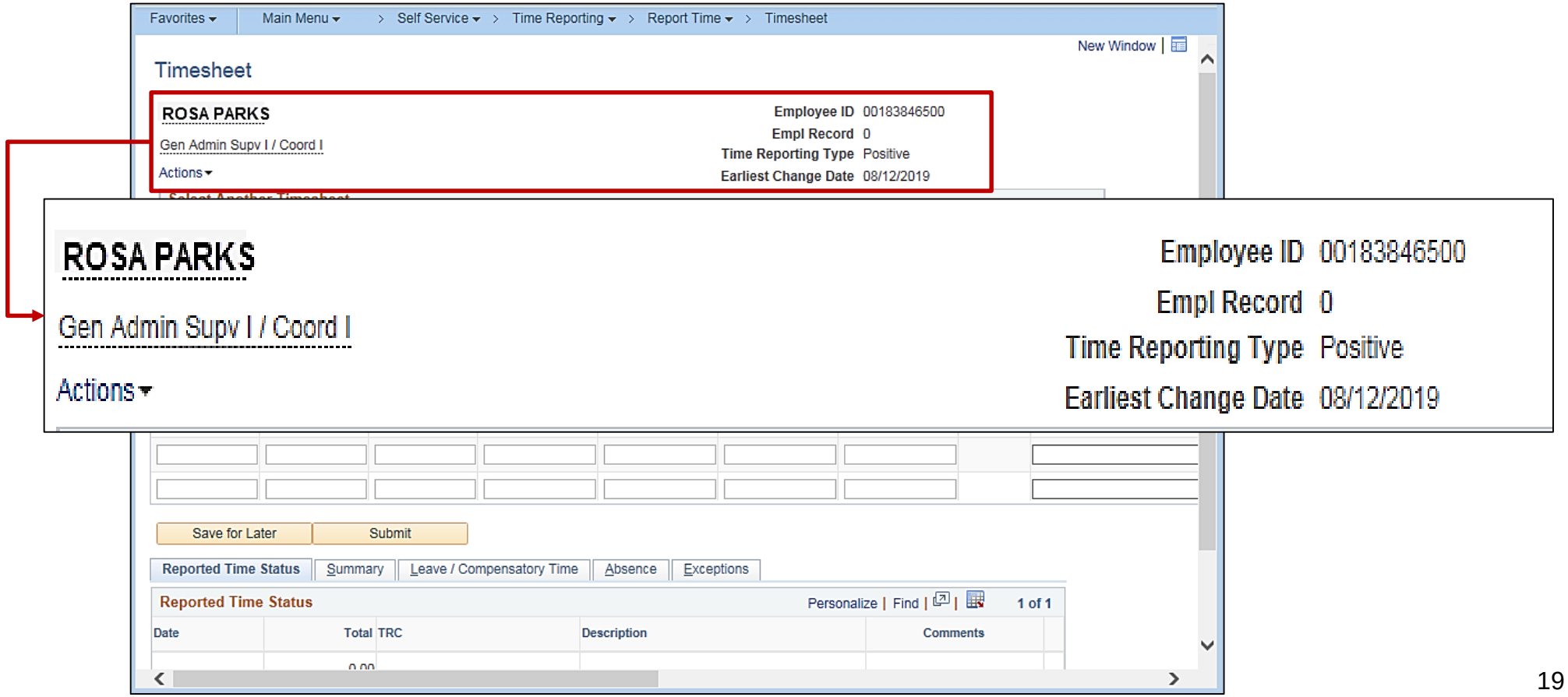
Positive: employees report all time worked on the Timesheet. **Note**: all VDOT employees are this type.

Exception: employees do not need to report regular time; only exceptions to the regular time (e.g., vacation, sick)

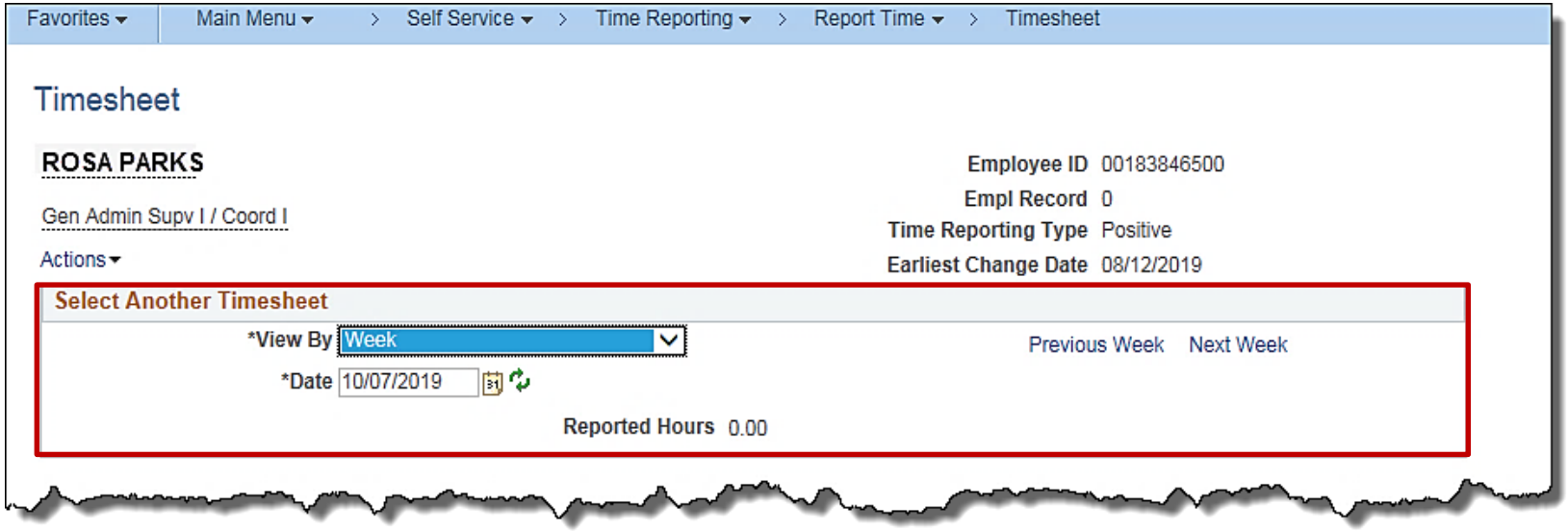


Header Section

It also contains the **Earliest Change Date** field. The **Earliest Change Date** is the date the Time Administration process will start processing the employee's time. It is triggered by newly submitted time, adjusted time, and approved absences and reflects the oldest date pending processing/reprocessing.



Select Another Timesheet Section



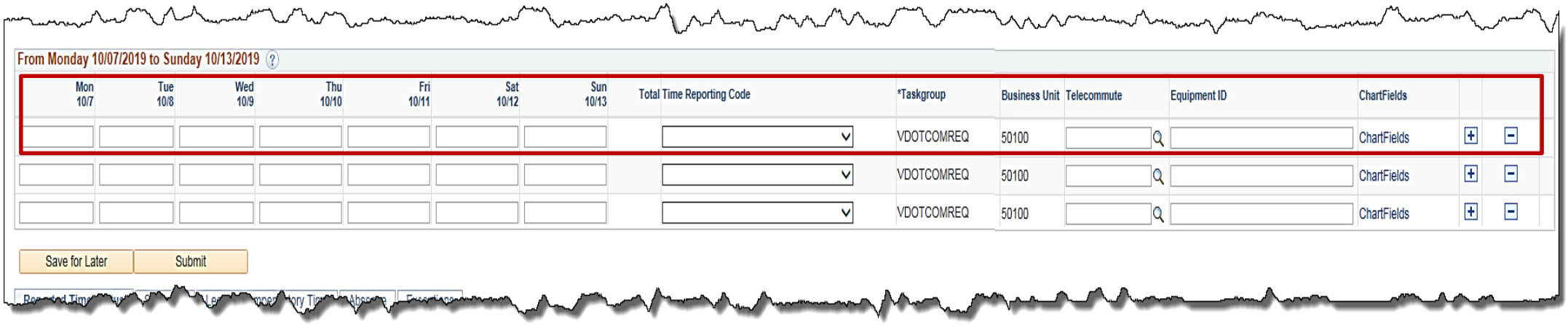
You can use the **Select Another Timesheet** section to change the view of the timesheet and the calendar period.

- **View By -** Select by day, week, or an alternative calendar period. The default view of the timesheet is a weekly format.
- **Date -** Enter a specific date, date in a week, etc. to be shown on the timesheet. Click on the calendar icon to open a calendar and then select the month, year, and day.
- **Refresh Timesheet** icon - Use the Refresh Timesheet [ ] icon to update the timesheet when changes are made to the **View By** and **Date** fields.
- **Previous Week -** Select this link to view the previous week.
- **Next Week -** Select this link to view the following week.
- **Reported Hours** – This field displays the hours reported on the timesheet for week.

Timesheet Grid Section

Use the Timesheet Grid to report time and task details for a day or week:

- Enter hours for each day by **Time Reporting Code (TRC),** e.g., **RGS**
- **Taskgroup:** Defaults and cannot be changed
- **Business Unit -** Defaults and cannot be changed
- **Telecommute** (if applicable) - Identify Hours as Telecommute if worked from out of office
- **Equipment ID** (if applicable) - Identify a specific piece of equipment was used, e.g., snow truck (only if agency requires it)
- **ChartFields –** Opens a new page where you enter the charge distribution for the time entered
- **+** and **–** buttons – Allows a line to added or deleted on the **Timesheet** page

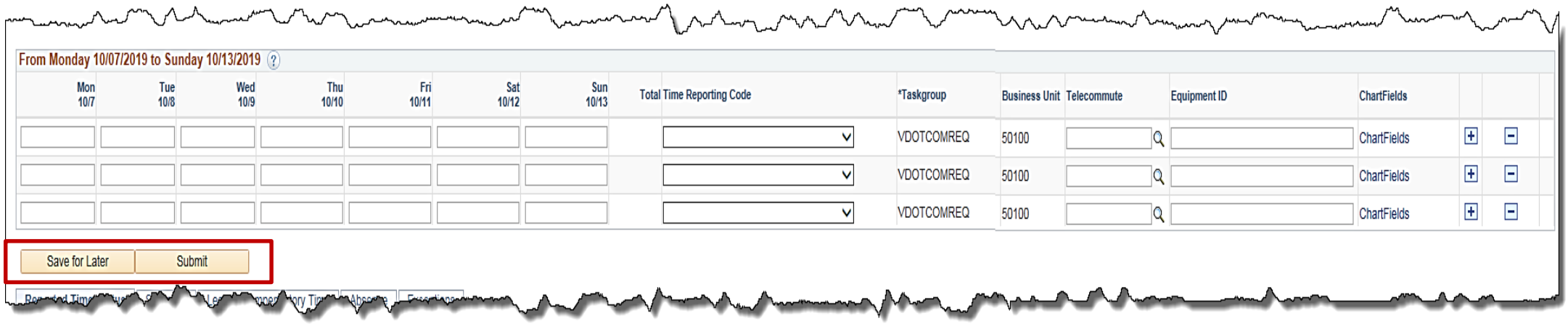


Timesheet Grid Section (continued)

Directly below the timesheet entry grid are two buttons:

- **Save for Later -** Saves entries on the **Timesheet** page. Saving time places it on hold on the page and does **not** send it to be processed.

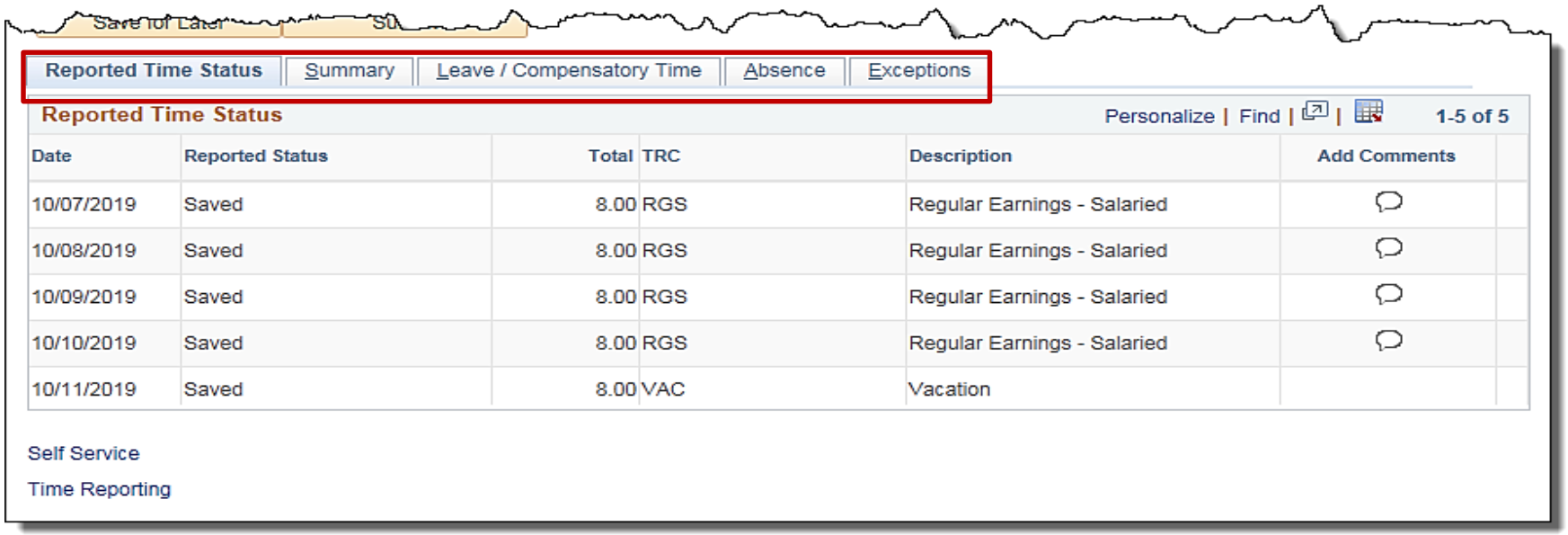
- **Submit -** Submits time entered in the timesheet grid to be processed and submits absence requests to the approver for approval.



Timesheet Tabs

Tabs on the **Timesheet** include:

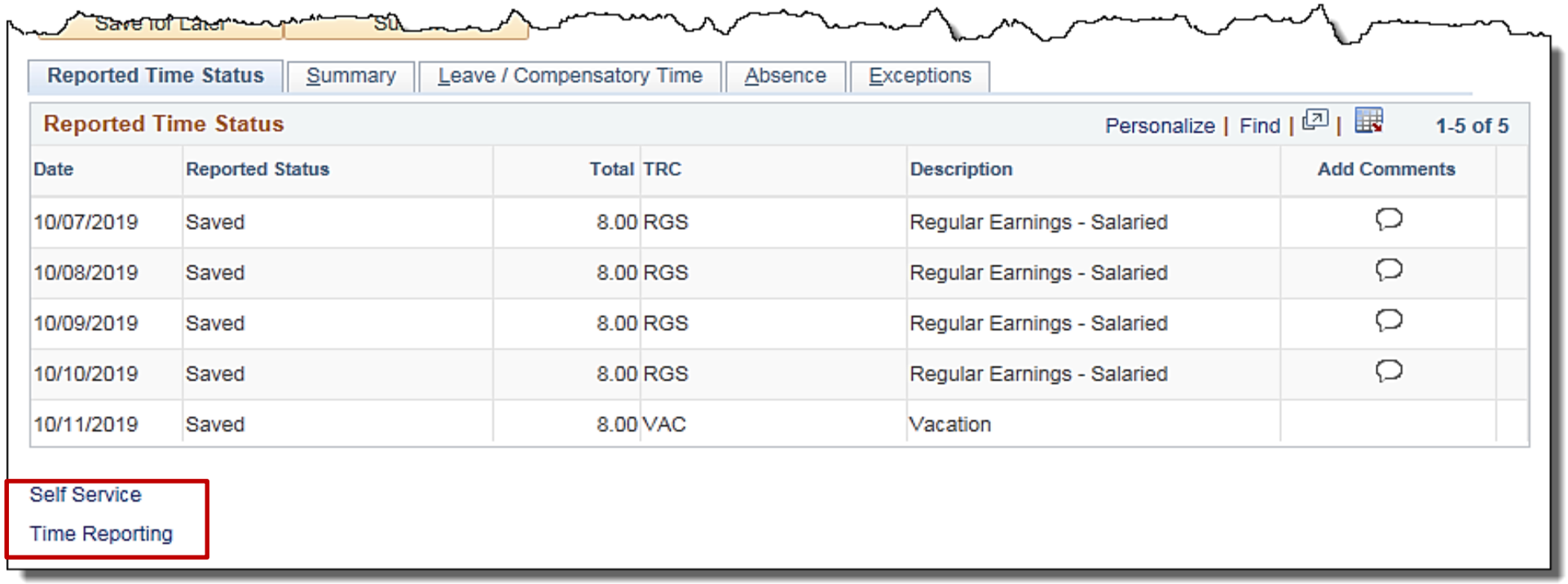
- **Reported Time Status -** Provides a view of the time entered by date and its **Reported Time Status**. The status displays as **Saved**, **Needs Approval**, or **Approved**. For time entered in the timesheet grid, the status displays as **Saved** or **Submitted**.
- **Summary -** Provides a one-row summary by TRCs of entered time.
- **Leave and Compensatory Time -** Provides a summary of Compensatory and Overtime leave. This tab is only visible if you are eligible for these types of leave and have a balance.
- **Absence -** Allows entry of absences and provides a view of details on outstanding absence requests and a view of absence entitlement balances.
- **Exceptions -** Allows you to view exception related information, if one exists, for the timesheet displayed.



Timesheet Page Links

Additional links at the bottom of the **Timesheet** page include:

- **Self Service -** This link opens the **Self Service** menu page.
- **Time Reporting -** This link opens the **Time Reporting** menu page.



Lesson 2: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.

The navigation path to access the Timesheet page is:

- Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Report Time > Timesheet
- Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Managing Your Time > Timesheet
- Cardinal FIN > Cardinal HCM > Main Menu > Self Service > Time Reporting > Report Time > Timesheet
- Time & Attendance > View Time

PROPERTIES

On passing 'Finish' button: Goes to Next Slide

On failing 'Finish' button: Goes to Next Slide

Allow user to leave quiz: After user has completed quiz

User may view slides after quiz: At any time

Show in menu as: Single item

The Time Entry section of the Timesheet page has a default display in which format?

- Daily
- Weekly
- Monthly

PROPERTIES

On passing, 'Finish' button: Goes to Next Slide

On failing, 'Finish' button: Goes to Next Slide

Allow user to leave quiz: After user has completed quiz

User may view slides after quiz: At any time

Show in menu as: Single item

Edit in Quizmaker | Edit Properties

Lesson 2: Summary

2 Navigating in Time and Attendance

In this lesson, you learned:

- How to access Cardinal HCM
- How to access the **Timesheet** page
- The layout of the **Timesheet** page:
  - The Header Section of the **Timesheet** identifies the employee by name, **Employee ID**, **Job Title, Employee Record,** and **Time Reporting Type**
  - The **Timesheet Grid** section allows you to enter hours for each day.
  - You can view time by day, week or another calendar period. You also can go to the **previous** or **next** week.
  - **Timesheet** tabs allow you to see Reported Time Status, Summary of Time, Requested Absences, View Absence Balances, and Exception time. For eligible employees, the Timesheet tabs also show Compensatory and Overtime Leave balances.

Lesson 3: Introduction

3 Entering and Viewing Time and Holidays

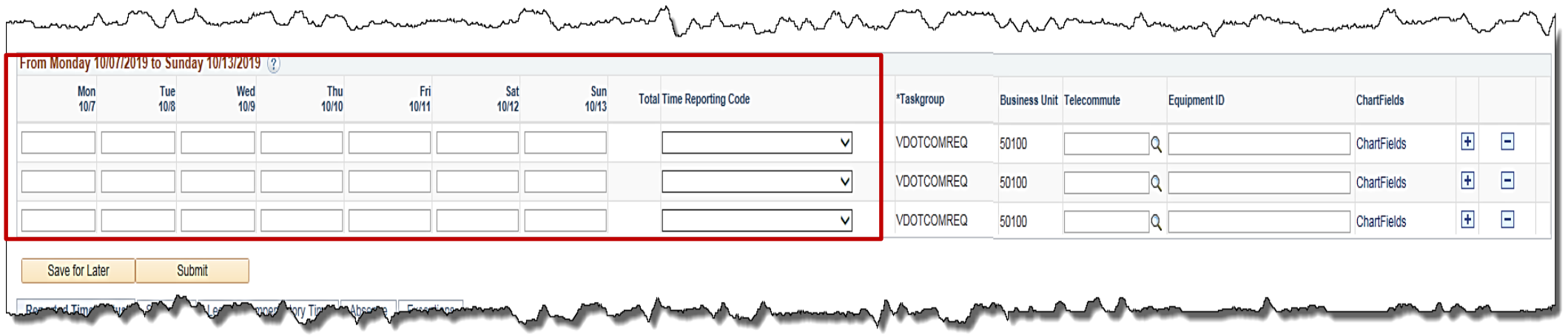
This lesson covers the following topics:

- Entering Regular Time and Overtime
- Viewing Compensatory and Overtime Leave Earned and Taken
- Viewing Holidays and Entering Floating Holidays
- Entering Office Closings

Entering Regular Time and Overtime

Cardinal provides a grid for you to enter your time. Enter hours worked for each day of the work week in increments of one-tenth of an hour (e.g., 8.0, 4.5, 3.2, etc.).

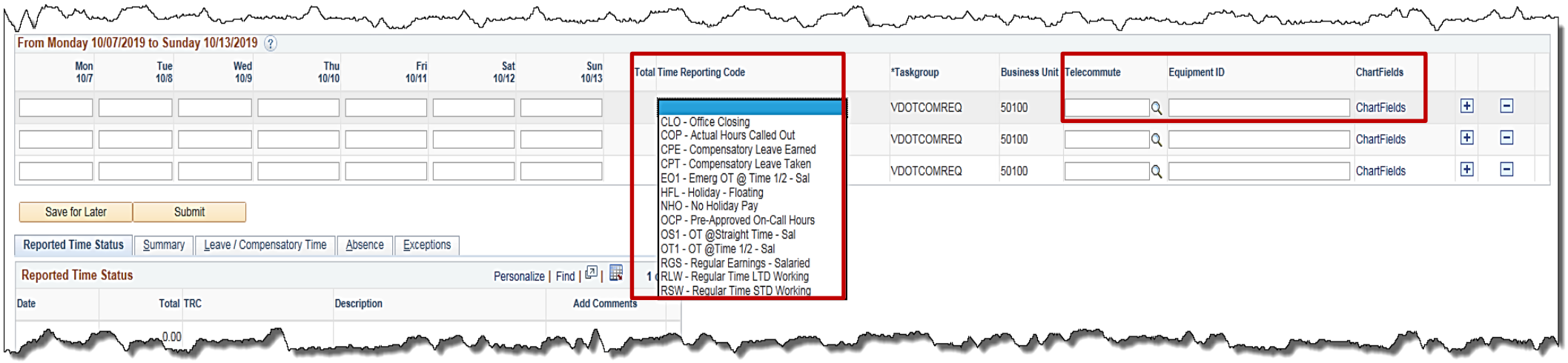
Cardinal allows entry of time up to 90 days into the future. If 90 days from the current date falls in the middle of the week, you may enter time for the portion of that week that is not grayed out.



Time Reporting Codes

The weekly time entry grid allows entry of multiple days for each unique combination of:

- **Time Reporting Code** (TRC) - Identify the Time Reporting Code for Hours entered
- **Telecommute** (if applicable) - Identify Hours as Telecommute if worked from out of office
- **Equipment ID** (if applicable) - Identify a specific piece of equipment was used, e.g., snow truck (only if agency requires it)
- **ChartFields** - Identify the charge distribution for the time entered

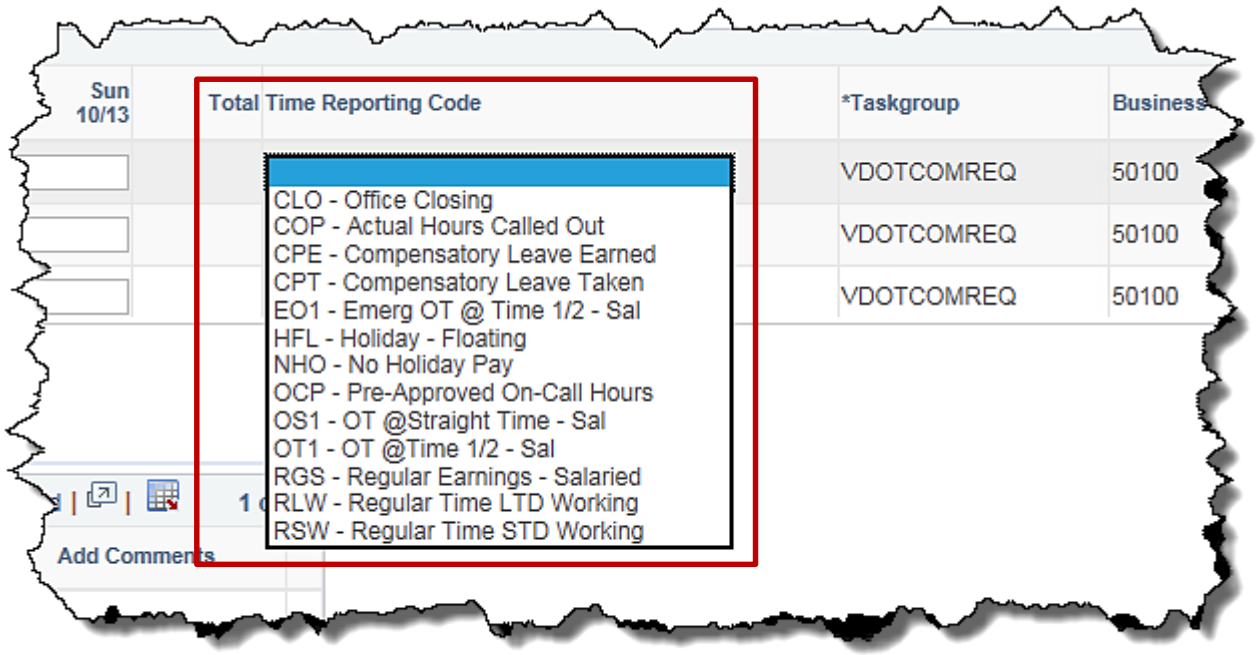


Time Reporting Codes

All hours entered on the timesheet are classified by **Time Reporting Codes** (TRCs) which describe the nature of the time being reported. Select the **Time Reporting Code**(s) from those available for the hours worked.

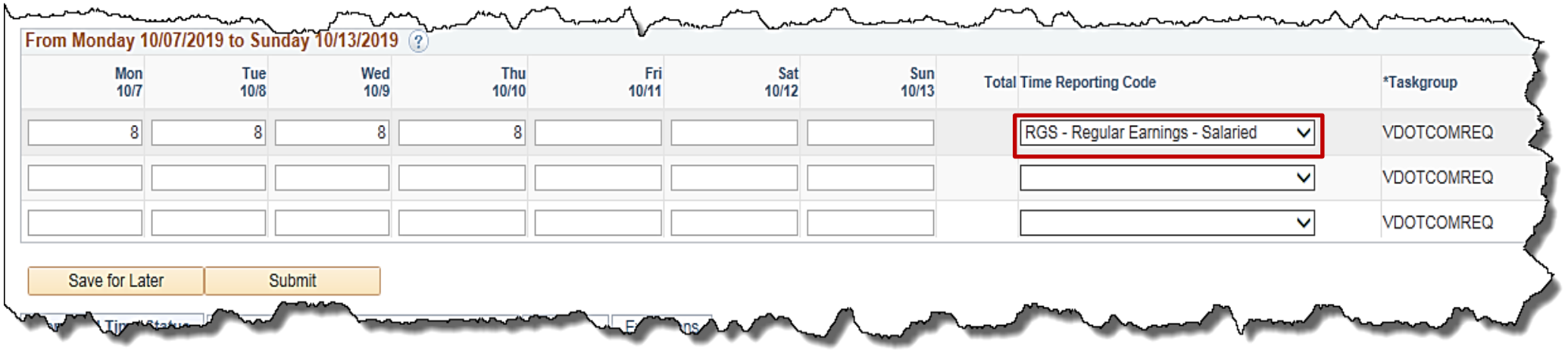
All employees are assigned to a Workgroup, which determines the TRCs that are available to them. For example, TRCs for compensatory/overtime earned and taken are available only to employees who are eligible to earn/take it.

For more detailed information about Workgroups and the TRCs available for each, see the job aid entitled **501 TA: Time Reporting Codes by Workgroup** located on the Cardinal website in **Job Aids** under **Training**.



Time Reporting Codes (continued)

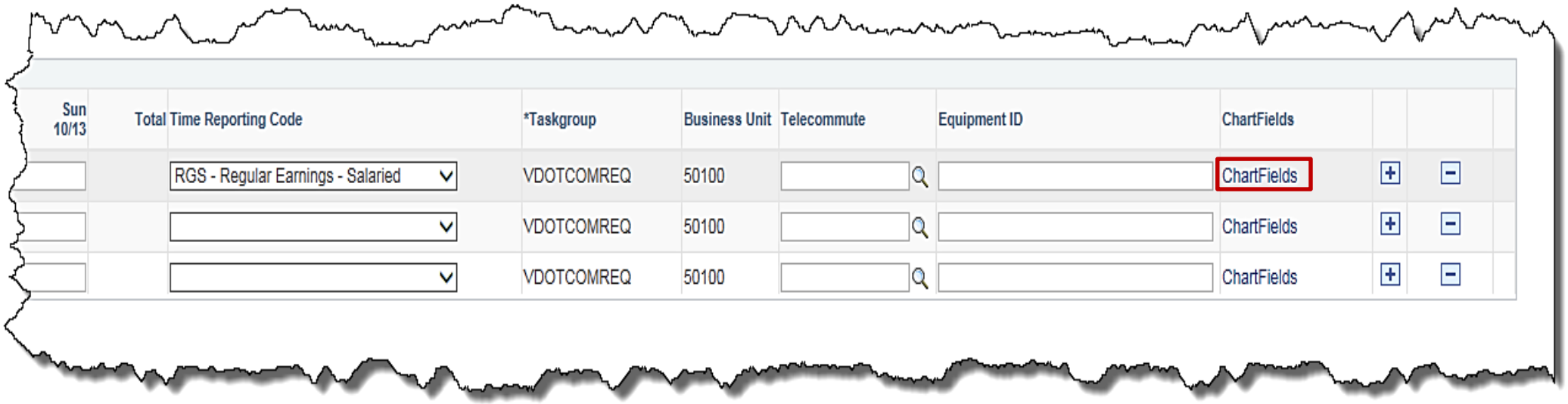
After entering hours, select the appropriate **Time Reporting Code** (TRC) related to the time entered. In this example, the TRC is **RGS – Regular Earnings - Salaried**.



Entering Charge Distribution Information

Every line of reported time entered must have a valid **TRC** and a **charge distribution**.

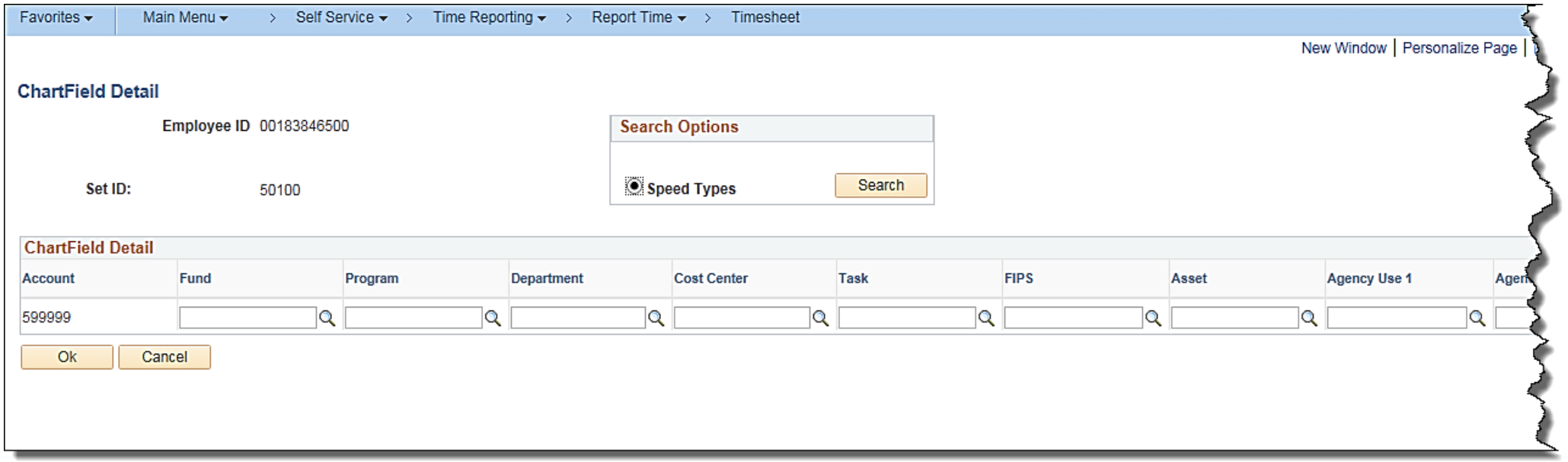
Click on the **ChartFields** link to access the **ChartField Detail** page.



ChartField Detail Page

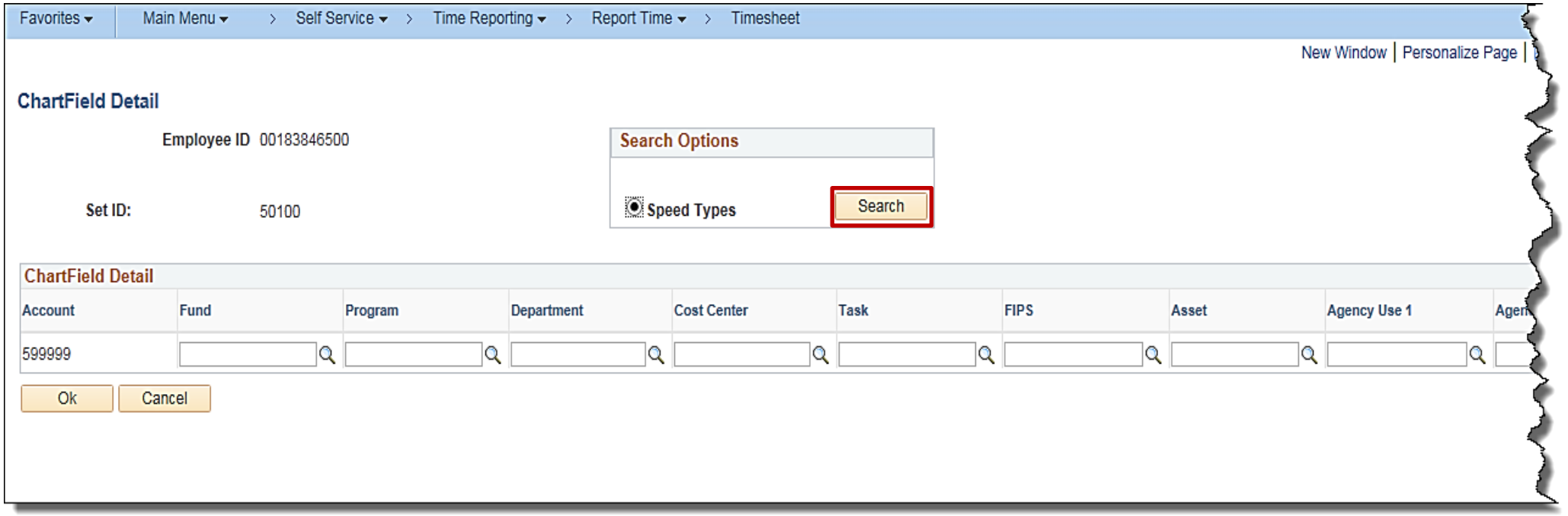
Account charge distribution may display default ChartField values. You can select or change individual values as needed. If you need to enter or change the charge distribution for time entered from the **ChartField Detail** page, click the **Search** button to access Speed Types. Most TRCs require ChartField entry, including the most commonly used (e.g., **RGS**). It is less common to see default values. Default values cannot be changed.

Note: Some TRCs are automatically set to default based on the Time Reporting Code selected, e.g., office closing, Holiday, etc. In those cases, the **Search** button is grayed out.



Searching Speed Types

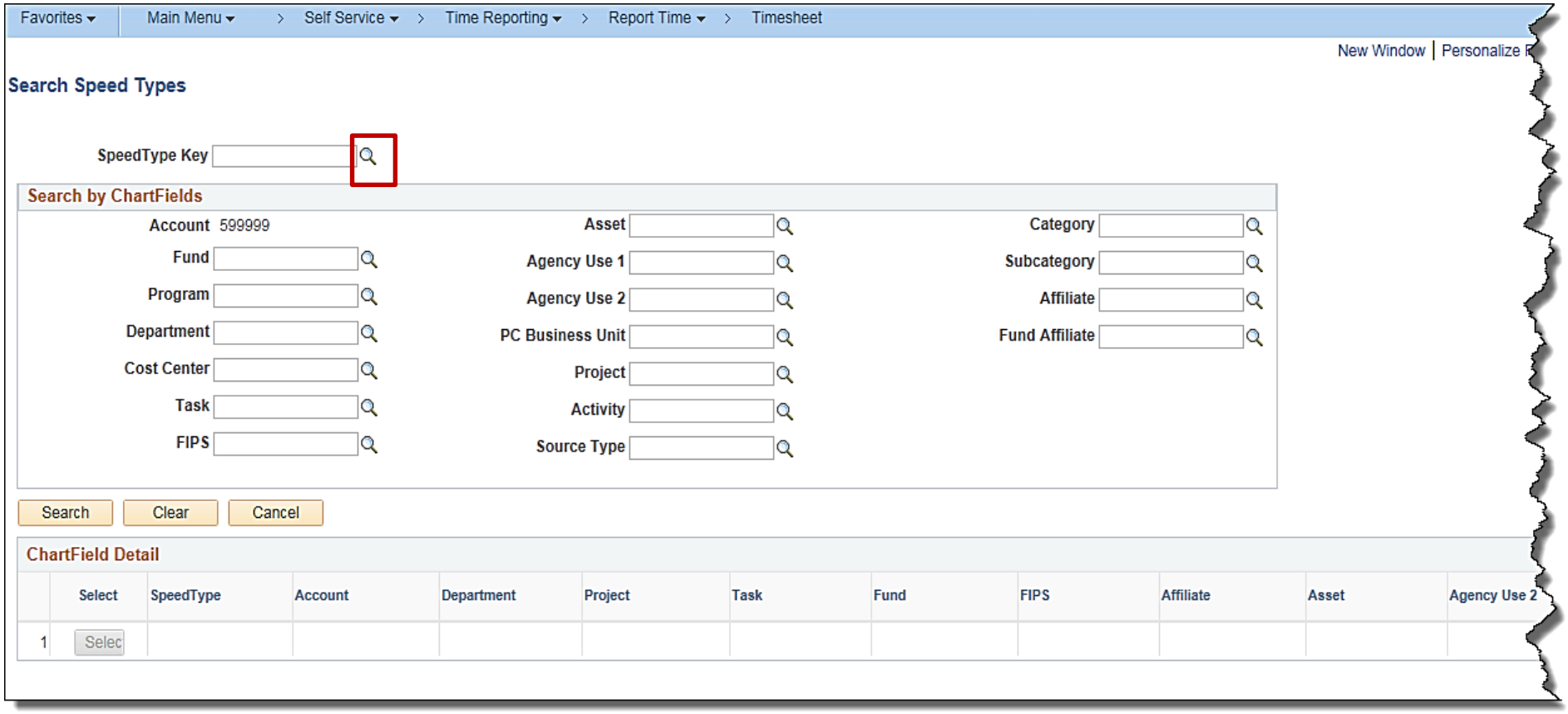
For this scenario, you will use Speed Types. Click the **Search** button.



Searching SpeedTypes (continued)

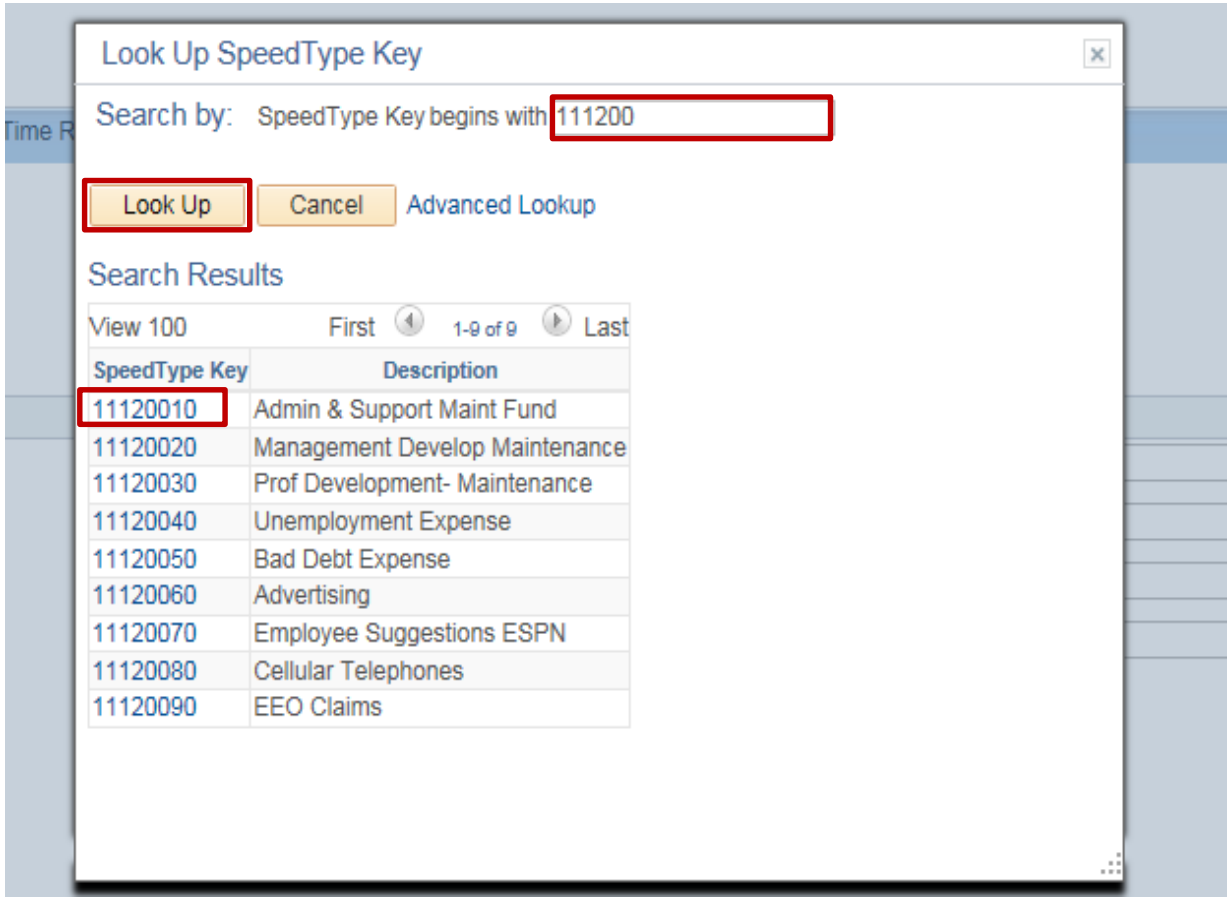
The **Search Speed Types** pop-up window displays. Cardinal uses SpeedTypes to auto-populate many of the ChartField values.

Click the **SpeedType Key** lookup icon.



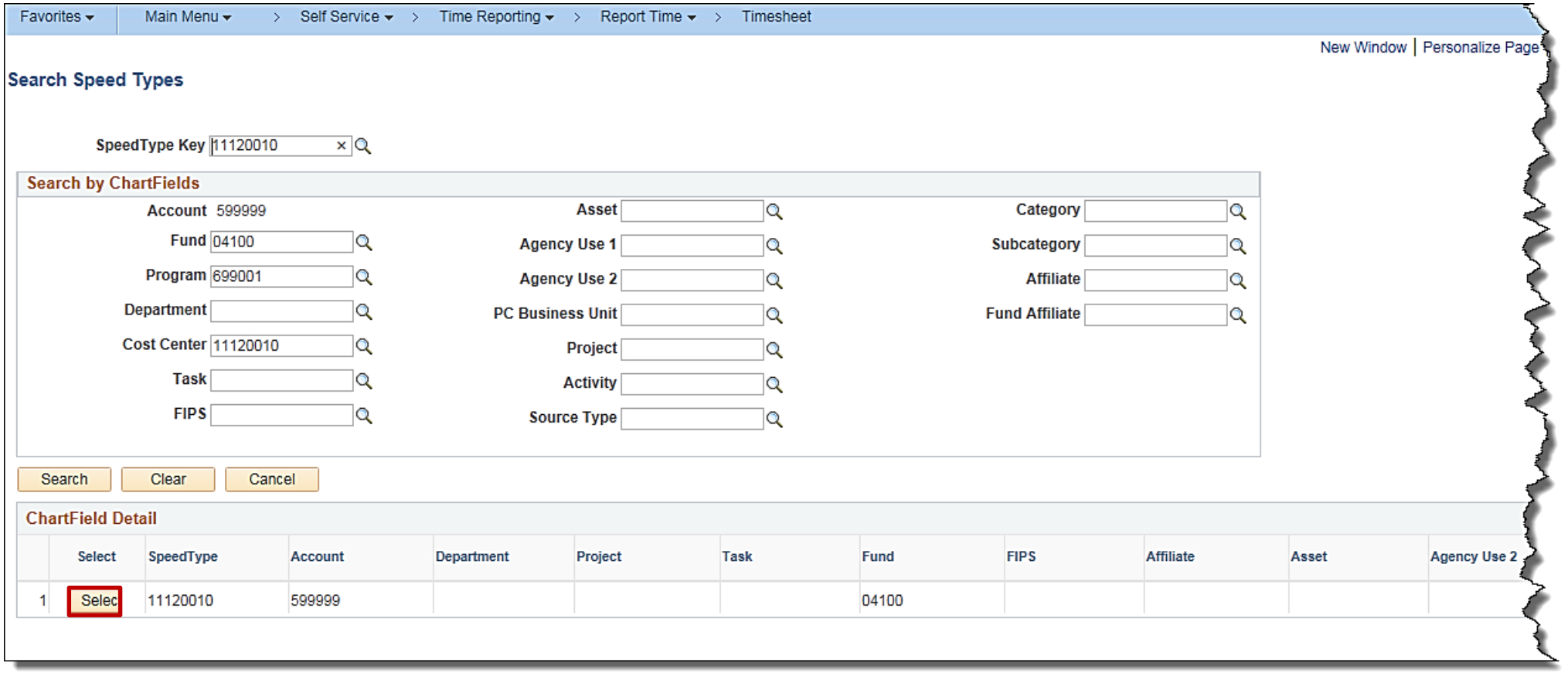
Steps to Enter SpeedTypes (continued)

- The **Look Up SpeedType Key** pop-up box displays.
- In the **Search by** field, enter all or part of the **SpeedType Key** (Cost Center or Project). Questions about SpeedType codes should be directed to your approver.
- Click the **Look Up** button.
- **SpeedType Keys** that match what you have entered display.
- Click the appropriate **SpeedType Key** (note this is a hyperlink) under **Search Results**.



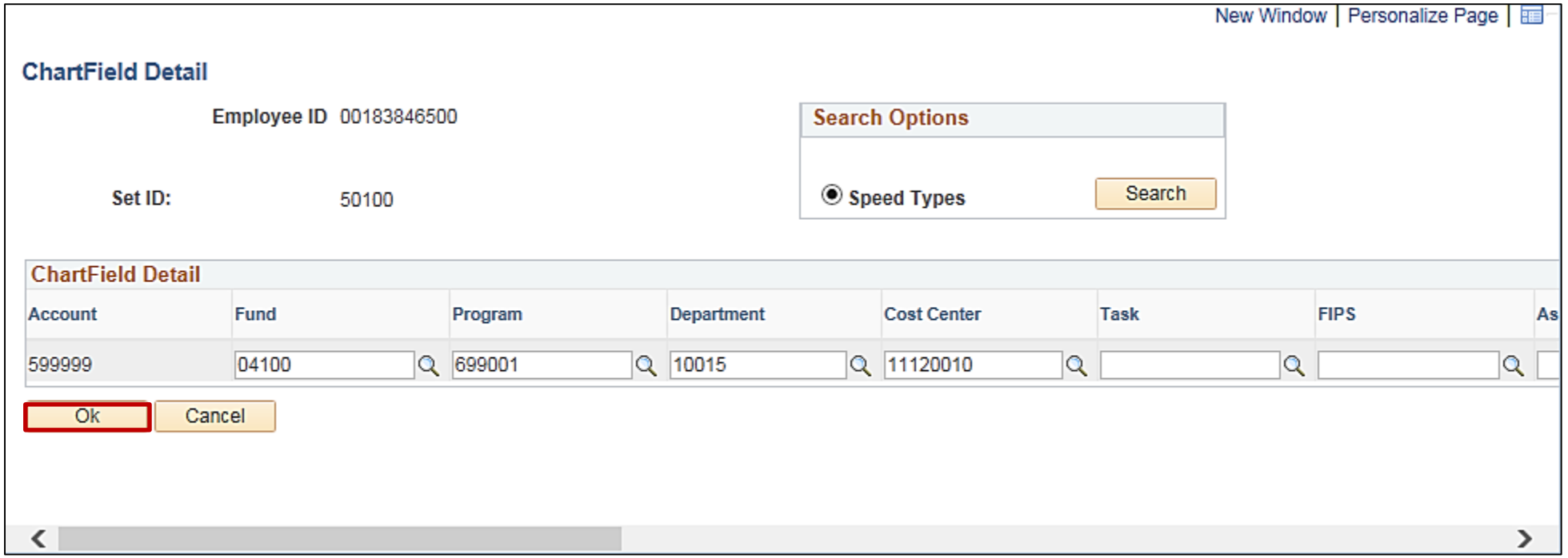
Steps to Enter SpeedTypes (continued)

- The **Search SpeedTypes** page returns with populated **SpeedType** values based on your selection.
- Do not add any additional values on this page. Additional required values must be added on the **ChartField Detail** page.
- Click the **Select** button under the **ChartField Detail** section to return to the **ChartField Detail** page.



Steps to Enter SpeedTypes (continued)

- In most cases, additional values will be required to make the charge distribution valid, e.g., Department.
- Enter any additional values or change others as appropriate.
- Click the **OK** button.

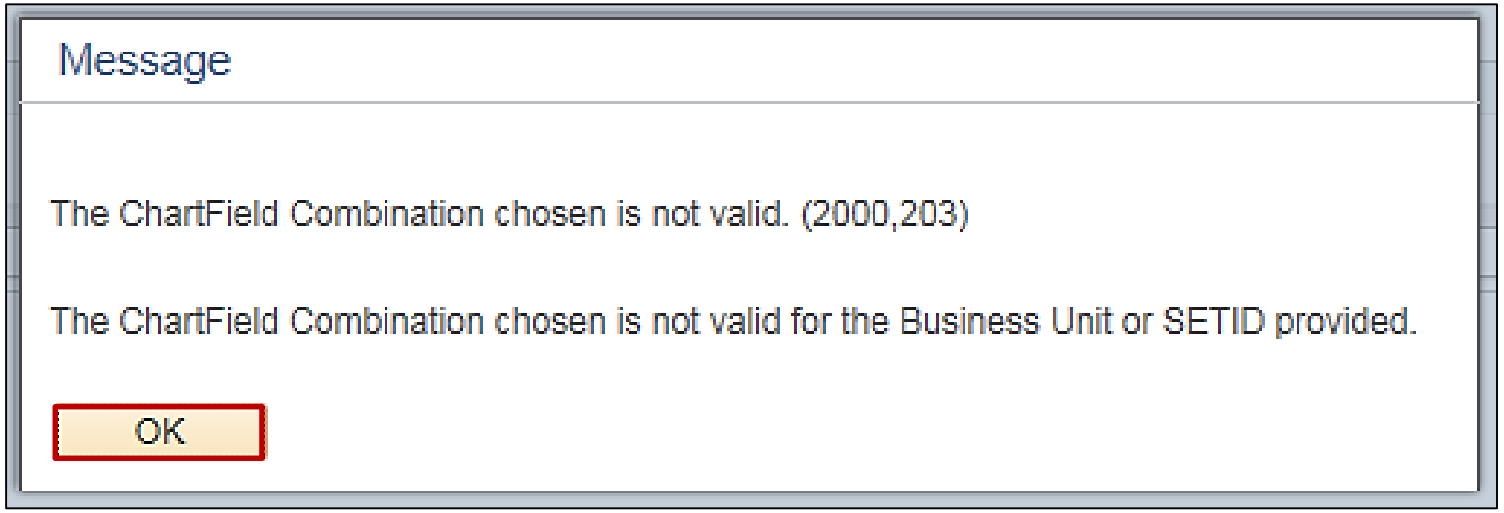


Steps to Enter SpeedTypes (continued)

Cardinal verifies the charge distribution and returns to the **Timesheet** page if the distribution is valid.

If the distribution is not valid, has missing required values, etc., Cardinal displays an error message like the one below.

Click the **OK** button on the **Message** and make the necessary adjustments to the ChartFields. After making adjustments, click the **OK** button on the **ChartField Detail** page to verify the updates to the charge distribution. If they are valid, the **Timesheet** page displays.



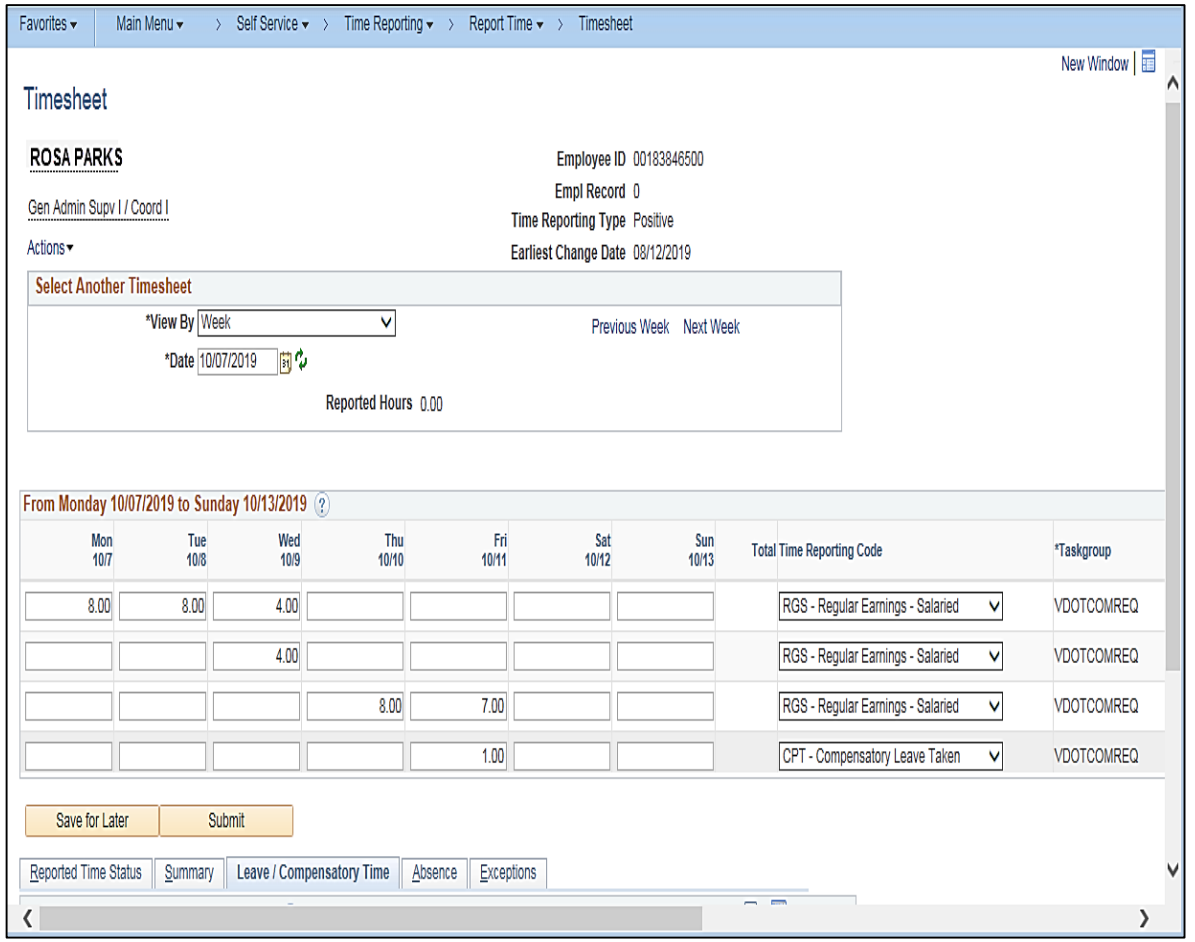
Charging Time to Multiple Distributions

The timesheet grid format allows you to charge time for multiple days for every unique TRC and charge distribution combination.

This reduces duplicate entry. Charging time to different projects can be done by selecting the appropriate **SpeedTypes** (ChartFields) for each individual time reporting line.

For example, this timesheet depicts entry for time worked as follows:

- Eight RGS hours Monday and Tuesday and four on Wednesday on Project A
- Four RGS hours on Wednesday on Project B
- Eight RGS hours on Thursday, and seven RGS hours on on Friday on Project C
- One hour of CPT time (Comp Time Taken) on Friday



Click on image to enlarge

Business Unit and Telecommute ID Fields

Taskgroup Field

This is a required field that defaults and cannot be changed.

Business Unit Field

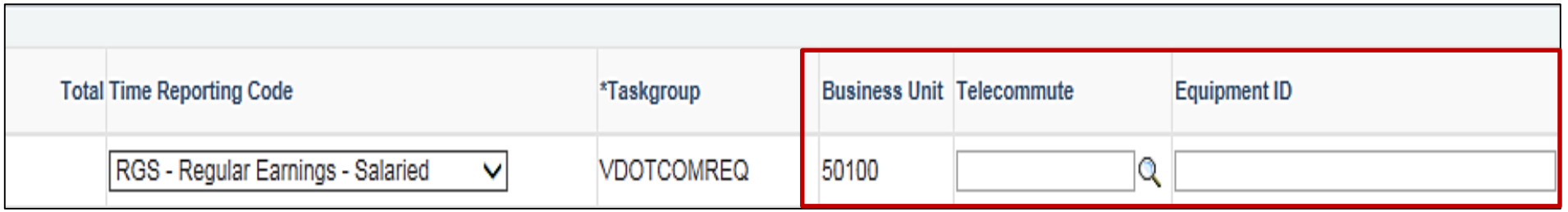
This is a required field. The **Business Unit** field defaults to the employee's agency (e.g., **50100** for VDOT) and cannot be changed.

Telecommute Field

To enter telecommute hours, if applicable, enter **TELE** in the **Telecommute** field. Otherwise, leave this field blank.

Equipment ID Field

Enter the identifier for the equipment.

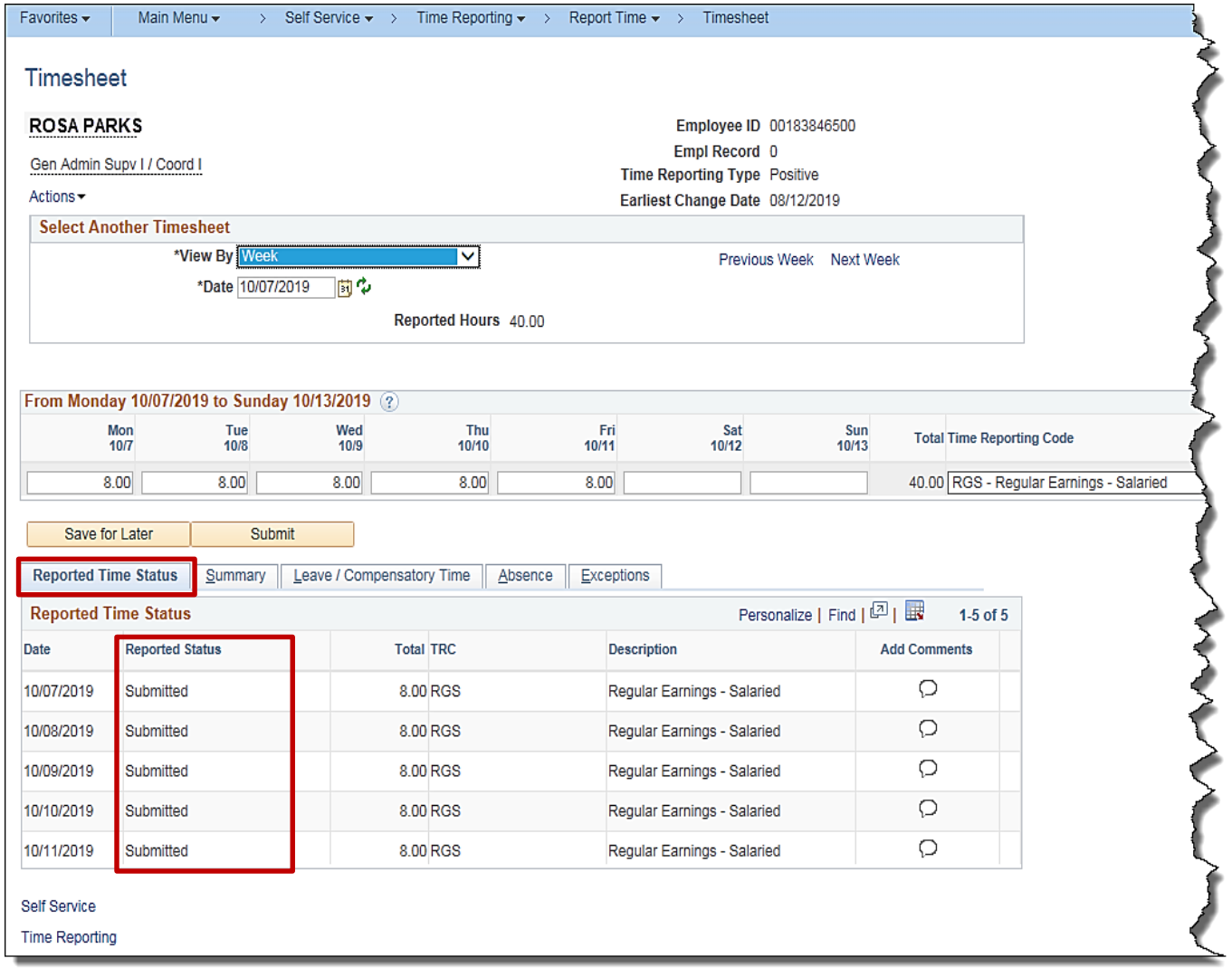


Viewing/Submitting Timesheet Status

Cardinal allows you to either submit the timesheet or to save it for later submission. To determine whether entered time has been **Saved** or **Submitted** on the **Timesheet** page, click the **Reported Time Status** tab to expand the section and view the status of time entered.

- If time has been saved but not submitted, the **Reported Status** field value displays **Saved**.

- If time has been submitted, the **Reported Status** field value displays **Submitted**.



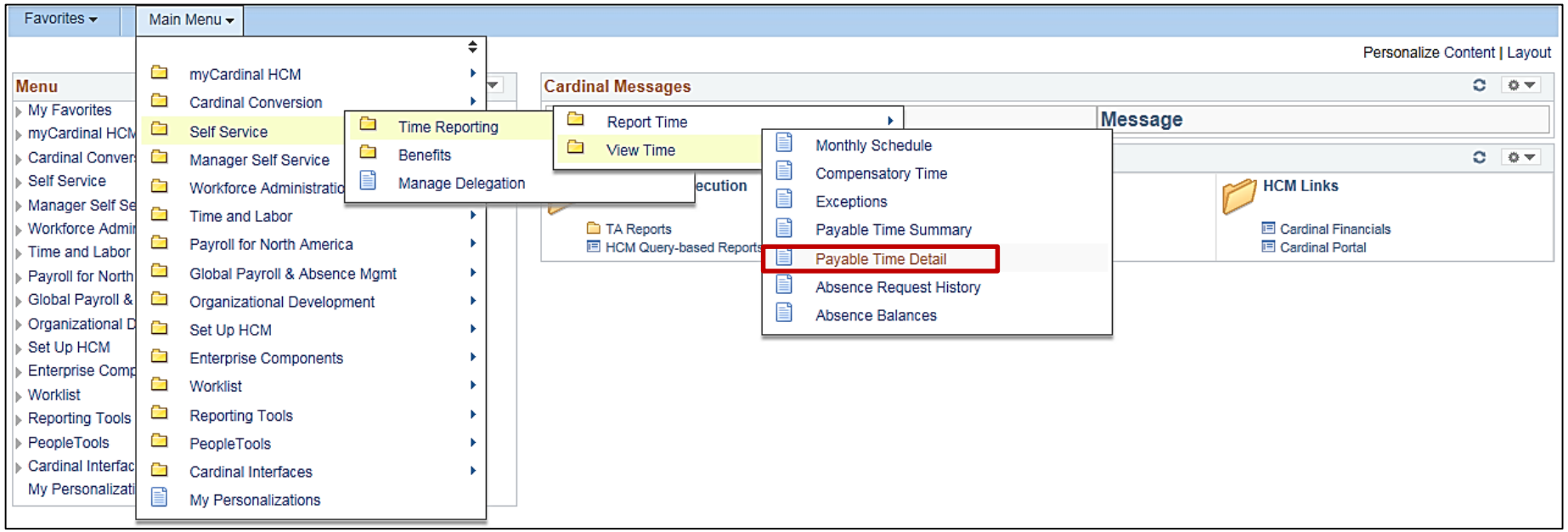
Viewing/Submitting Timesheet Status (continued)

Once you submit your time, hours are processed by Time Administration, a batch process that is run periodically throughout the day which validates reported time against time reporting rules.

This process generates what is called **Payable Time** (i.e., the final submitted time that is approved and paid).

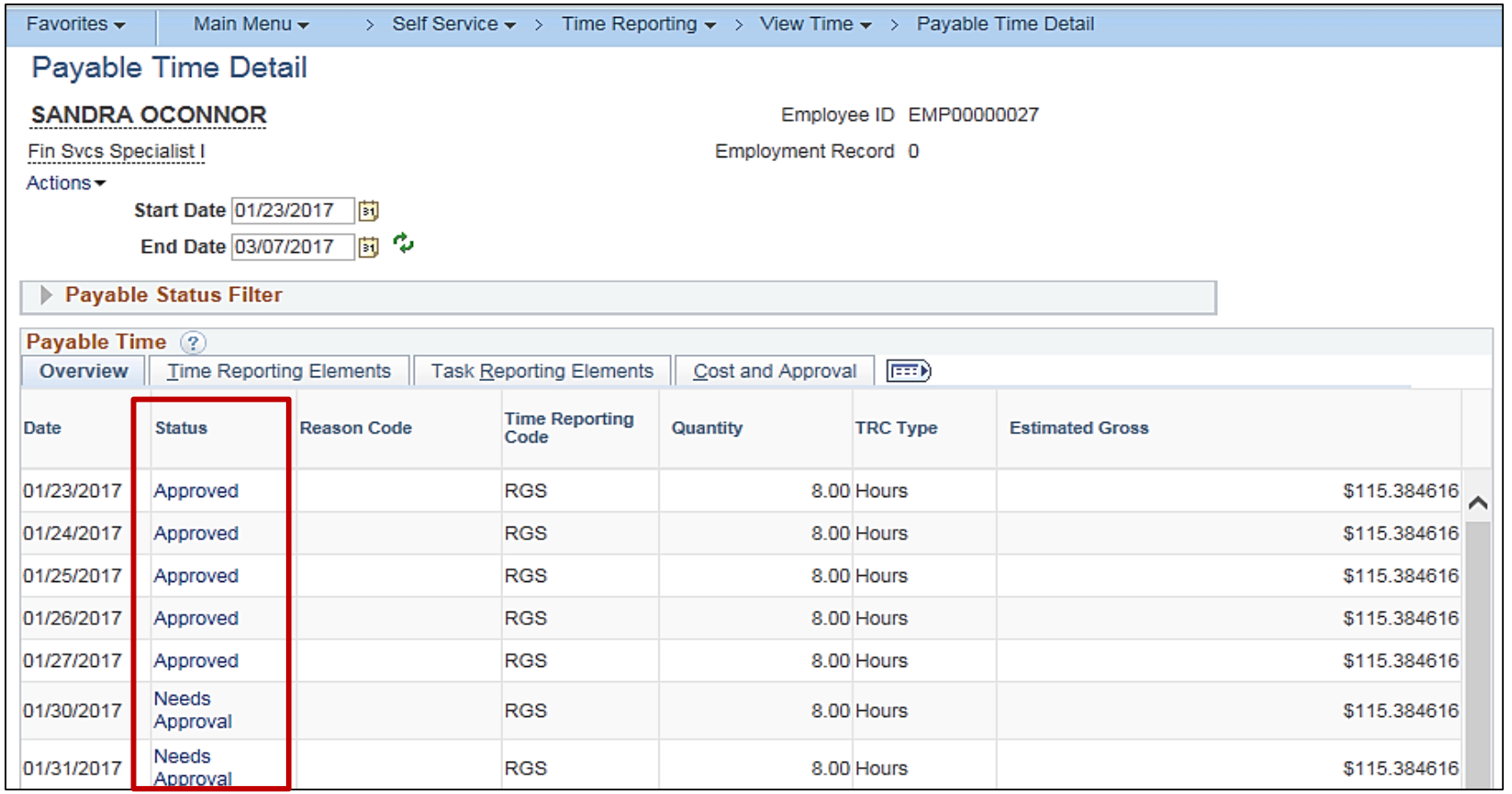
Time Administration also records any exceptions to reported time. Finally, it routes your timesheet and absence requests to your supervisor for approval.

To view Payable Time, navigate using the following path: **Main Menu > Self Service > Time Reporting > View Time > Payable Time Detail**.



Viewing/Submitting Timesheet Status (continued)

From the following path, **Main Menu > Self Service > Time Reporting > View Time > Payable Time Detail**, you can view the **Status** of the hours you submitted for approval. **Status** must be **Approved** to be payable through payroll.



Date	Status	Reason Code	Time Reporting Code	Quantity	TRC Type	Estimated Gross
01/23/2017	Approved		RGS	8.00	Hours	$115.384616
01/24/2017	Approved		RGS	8.00	Hours	$115.384616
01/25/2017	Approved		RGS	8.00	Hours	$115.384616
01/26/2017	Approved		RGS	8.00	Hours	$115.384616
01/27/2017	Approved		RGS	8.00	Hours	$115.384616
01/30/2017	Needs Approval		RGS	8.00	Hours	$115.384616
01/31/2017	Needs Approval		RGS	8.00	Hours	$115.384616

Viewing/Submitting Timesheet Status (continued)

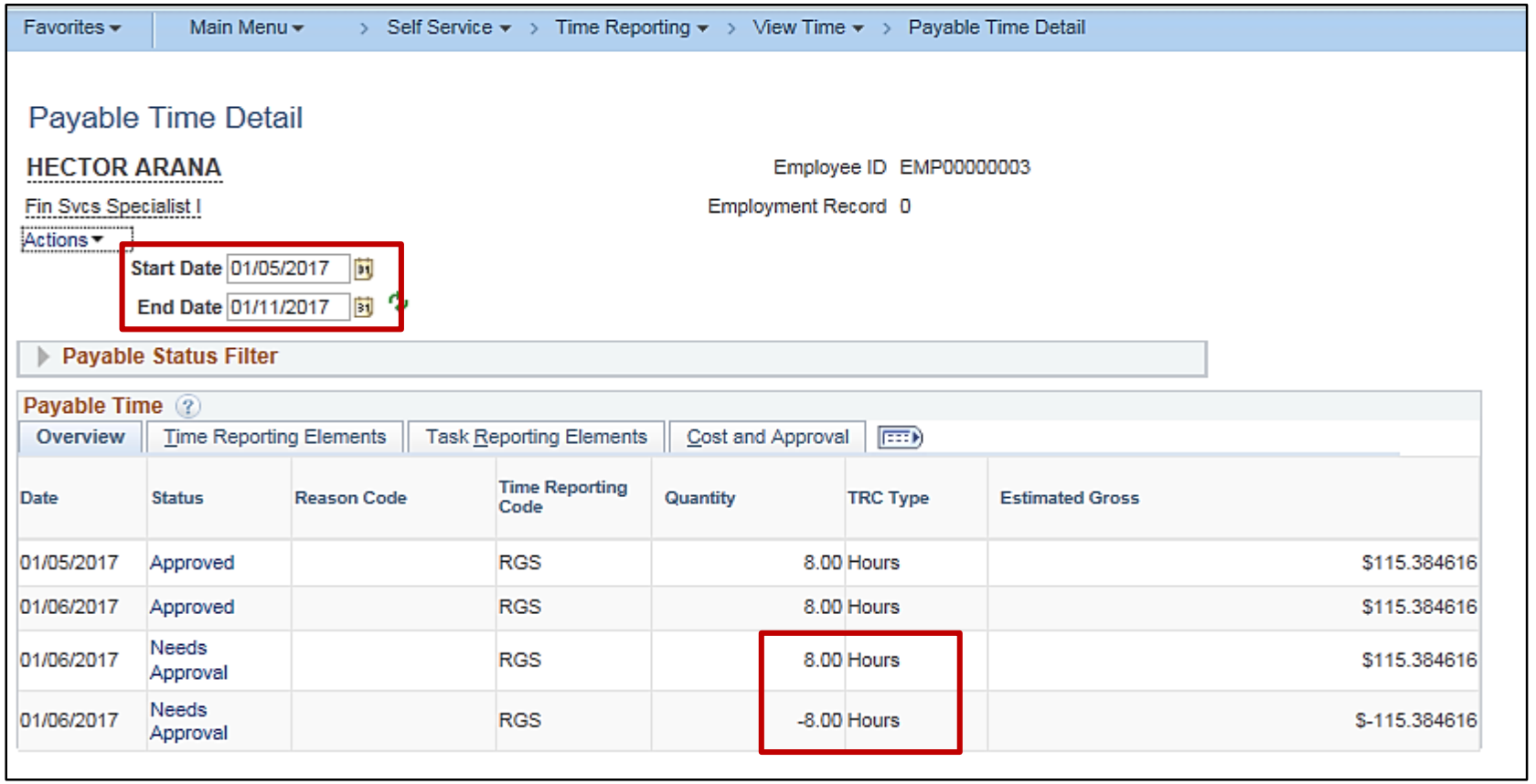
The **Payable Status** field displays one of the following values:

- **Needs Approval -** Waiting for approver approval
- **Approved -** Approved by the approver
- **Rejected by Payroll -** Rows that will not be allocated to General Ledger
- **Distributed -** Paid and Allocated to General Ledger
- **Denied -** Denied by the approver
- **Estimated -** Does not require approval per workgroup (**RGS/UOT** for some employees based on workgroup does not require approval and is generated in **Estimated** status until period close when it changes to approved)
- **Taken by Payroll -** Time that was approved and is currently being allocated (will change to **Distributed** or **Rejected** by Payroll after allocation is complete)

Viewing/Submitting Timesheet Status (continued)

Cardinal does not allow users to manually enter negative hours. However, you may see negative hours displayed on the **Payable Time Detail** page.

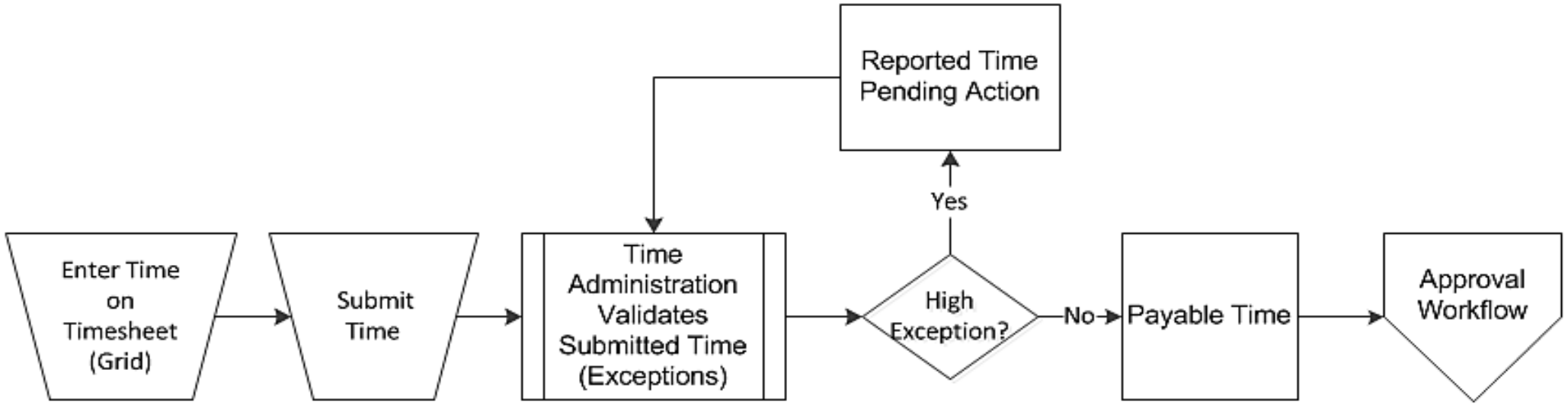
Those hours are generated by Cardinal. Cardinal automatically creates negative hours to offset any adjustment to reported time or when an absence occurs after time has been submitted and approved.



Administer Time and Attendance Validation and Approval

In order to be processed by Time Administration, reported time must be submitted. Time should be entered and submitted at the end of the week and the end of the pay period. Once time has been submitted for processing, Time Administration validates against time reporting rules and generates payable time. Time Administration may also generate exceptions (low, medium, or high severity).

Only high severity exceptions prevent time processed from becoming payable time, but all exceptions should be reviewed and corrected.

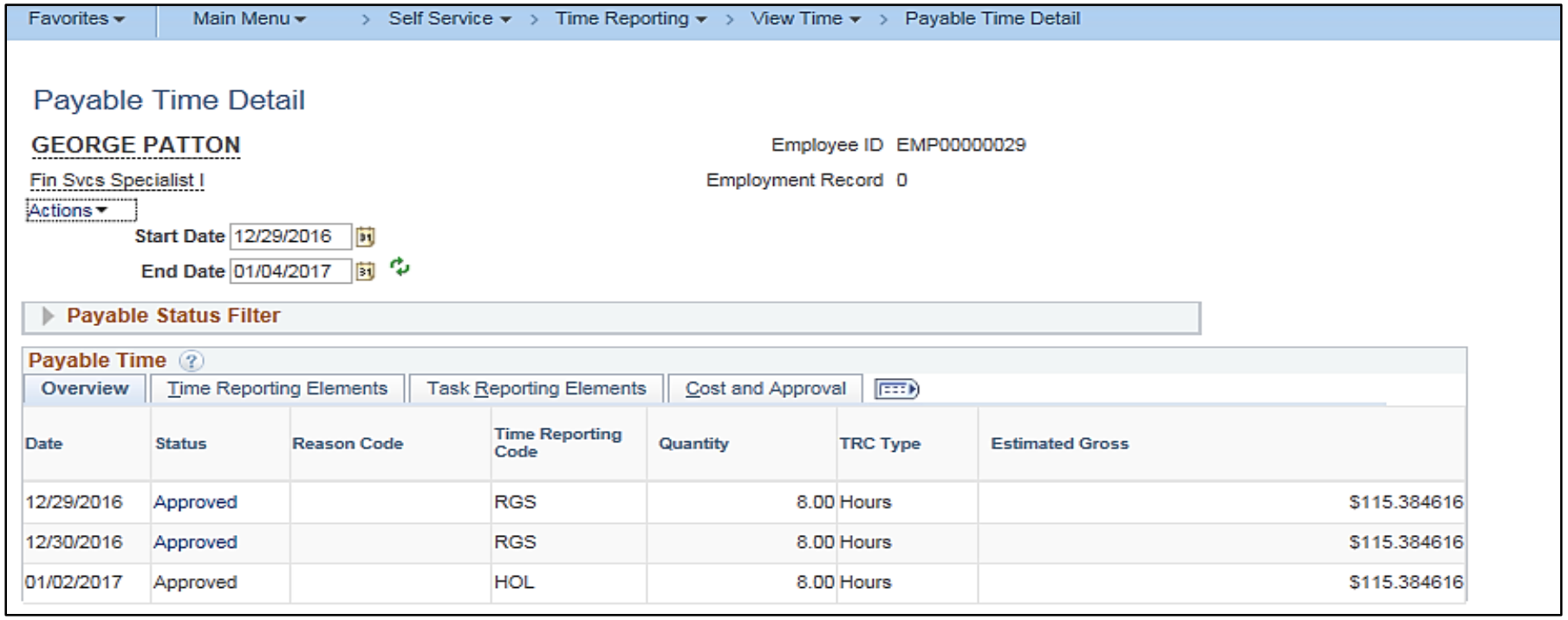


Administer Time and Attendance Validation and Approval (continued)

Your approver may approve or deny payable time. Once the approver takes action, you can check the status of your time by accessing the **View Payable Time Detail** page. If the **Status** is denied, discuss the reason with your supervisor, make the necessary adjustments, and resubmit the time for processing and approval.

Navigate to the **Payable Time Detail** page using the following path:

Main Menu > Self Service > Time Reporting > View Time > Payable Time Detail



Administer Time and Attendance Validation and Approval (continued)

The Agency provides annual schedules of due dates for timesheet submission and approval.

Your schedule for punctually completing and submitting your timesheet allows adequate time for:

- Time Administration processing
- Correction of exceptions as needed
- Resubmission through Time Administration as needed
- Final approval for payable time to be created

Timesheet Lockout

Timesheets are placed on a temporary lockout at the end of a pay period for a brief window of time. This prevents any changes to payable time during the allocation process which is a process that distributes payroll costs to various projects, cost centers, etc. Once the lockout is lifted, adjustments can be made to that pay period if necessary. Check your Salary/Hourly Calendars to see specific Lockout dates.

During Lockout:

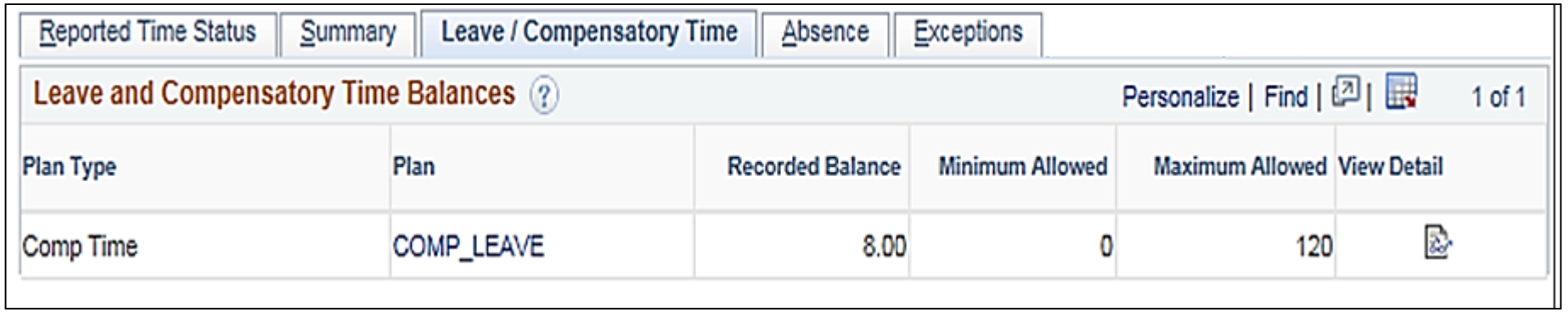
- No salaried timesheet entry/approval can occur for that pay period or for prior period adjustments.
- Salaried timesheet entry/approval is allowed for up to six future pay periods subsequent to the specific period under lockout.

When Lockout is not in effect, you can enter, approve, and/or adjust timesheets for up to six prior pay periods but not prior to the first pay period of the current fiscal year.

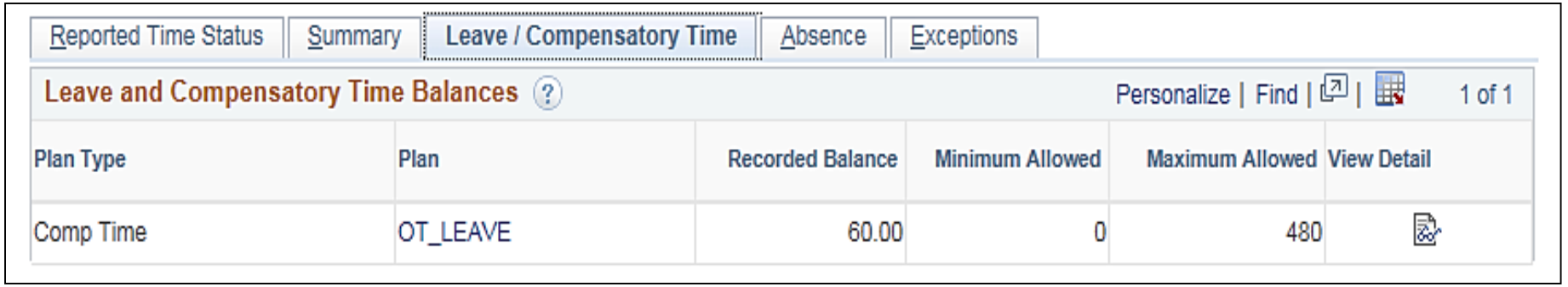
Compensatory and Overtime Leave

If you are eligible for compensatory and overtime leave, you can view earned and taken compensatory and overtime leave time on the **Timesheet** page. Click the **Leave/Compensatory Time** tab to view available balances.

Example Compensatory Leave



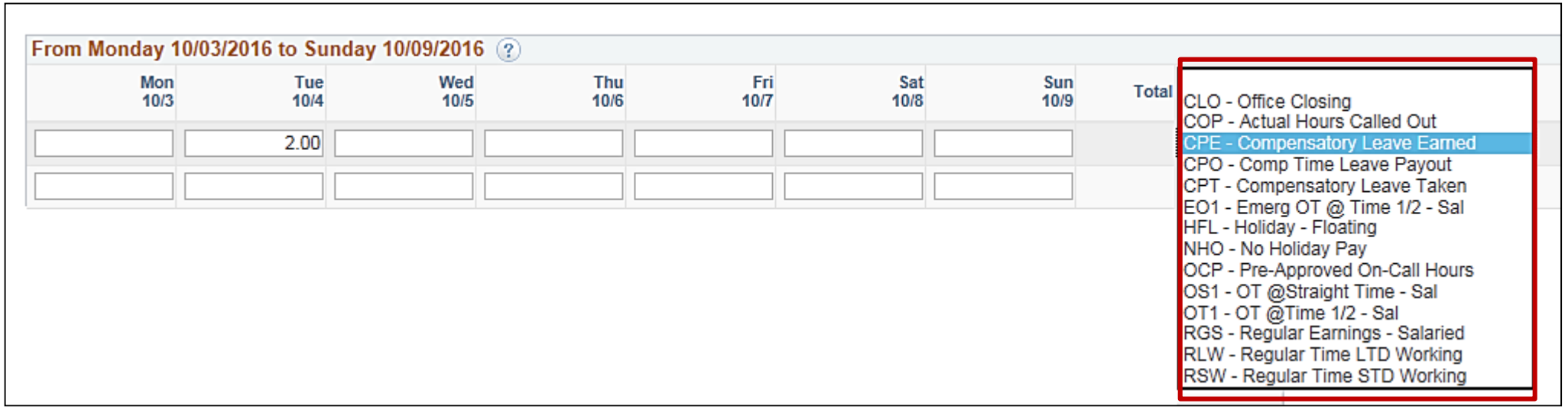
Example Overtime Leave



Compensatory and Overtime Leave (continued)

If you are eligible, you can enter the following Time Reporting Code(s) directly on the timesheet:

- **CPE -** Compensatory Leave Earned
- **ECP -** Emergency Compensatory Leave Earned
- **CPT -** Compensatory Leave Taken
- **OTL -** Overtime Leave Earned
- **EOL -** Emergency Overtime Leave Earned
- **OTT -** Overtime Leave Taken

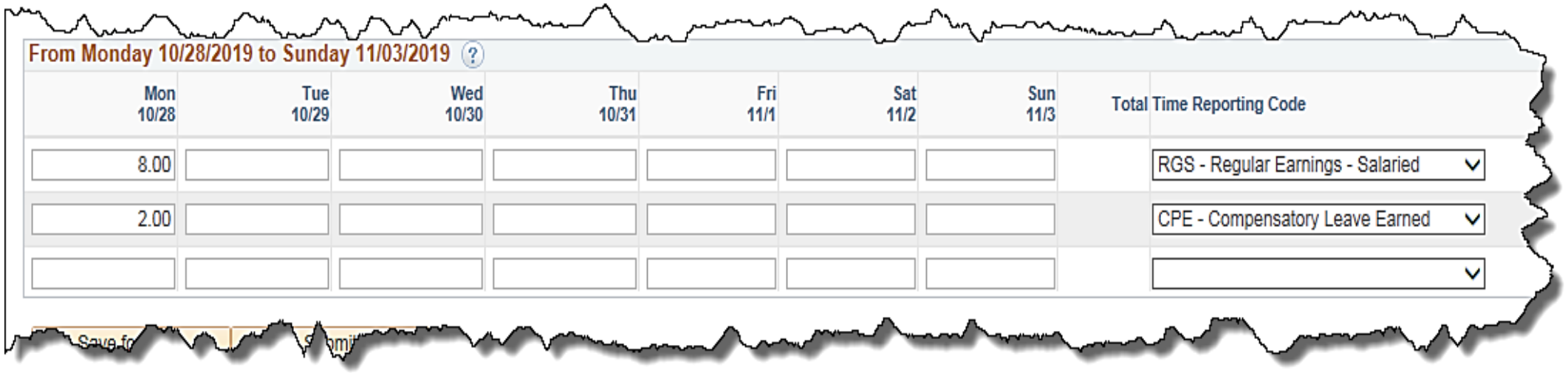


Compensatory and Overtime Leave (continued)

When compensatory leave or overtime leave is earned, the time should be entered on the timesheet with the corresponding TRC and the appropriate charge distribution associated with the work.

When compensatory or overtime leave is taken, the time should be entered on the timesheet with the corresponding TRC. Cardinal auto-populates the charge distribution on the **ChartFields** link.

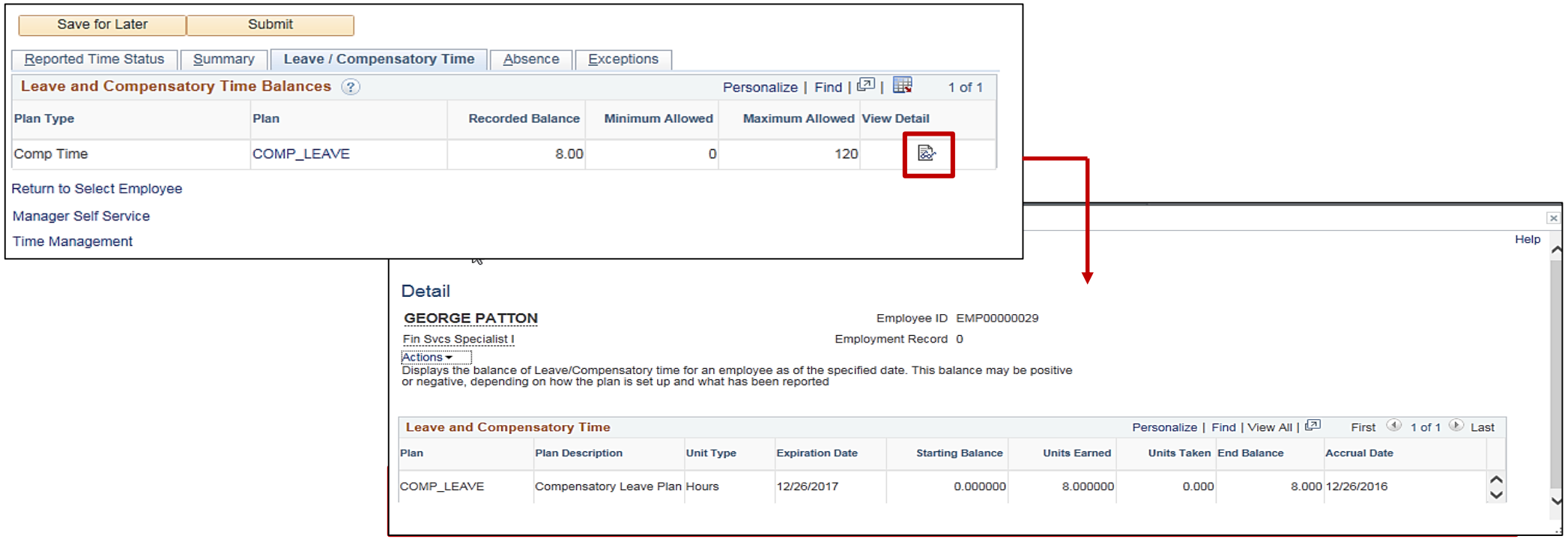
Entered compensatory and overtime hours are processed by Time Administration and then routed to the approver for approval.



Compensatory and Overtime Leave (continued)

You can view compensatory and overtime leave balances in the **Leave and Compensatory Time Balances** at the bottom of the **Timesheet** page. The **Leave and Compensatory Time** page provides more detail about compensatory and overtime leave, including the balance as of the current date.

Click on the **View Detail** icon for each leave type in the Plan field to open the **Leave and Compensatory Time** page.

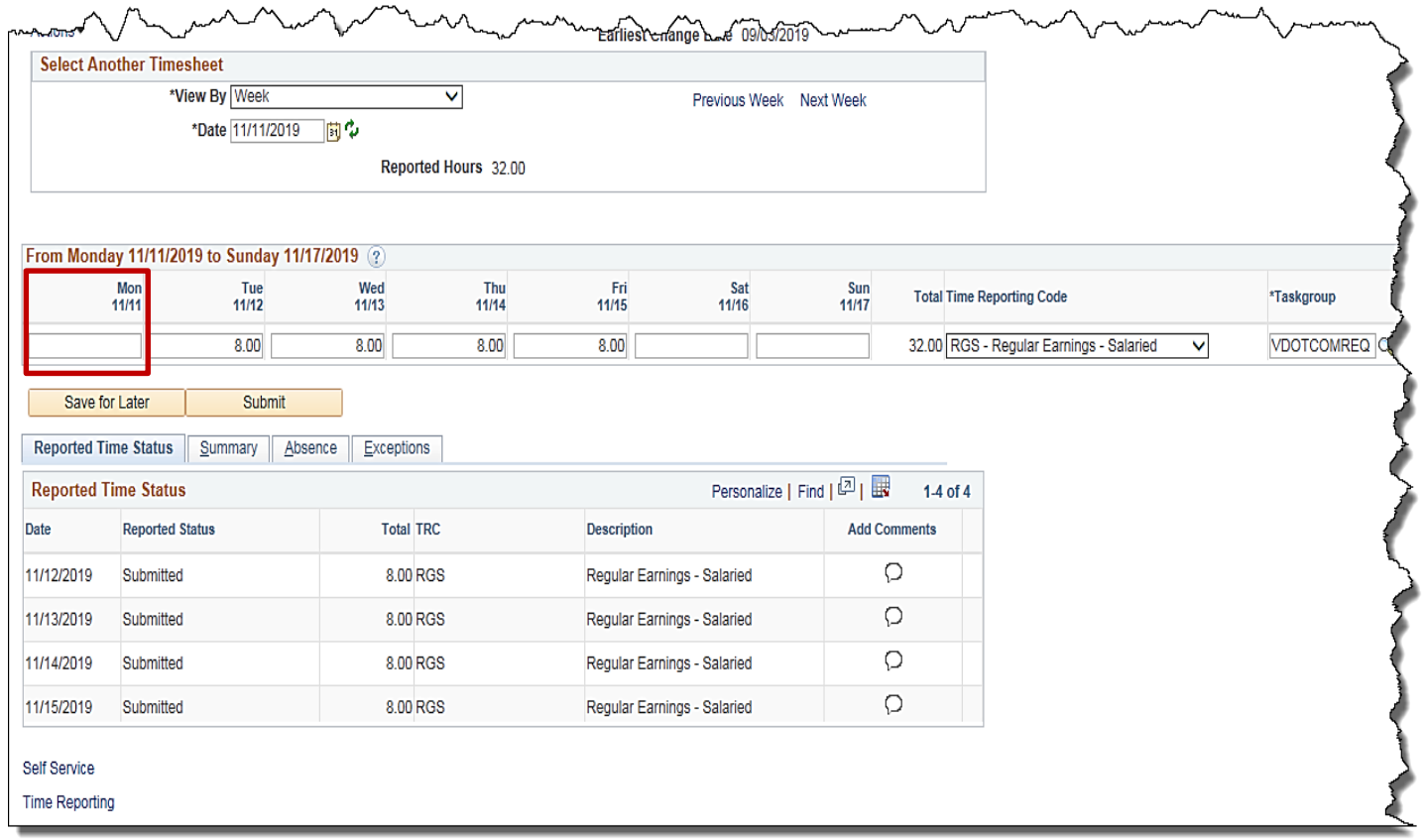


Holidays

Holidays do not display on the timesheet. However, Time Administration automatically recognizes all State holidays and gives each eligible employee the appropriate number of holiday hours required. For this scenario, Mon 11/11 is a Holiday.

Holiday hours are given in full and half day increments (8 hours or 4 hours). If an eligible employee is on a work schedule with more than 8 hours a day, they must report the additional hours (beyond the 8 holiday hours granted) with another appropriate TRC or leave type.

Do not enter a **TRC** or any hours on a holiday unless hours were worked on that holiday.

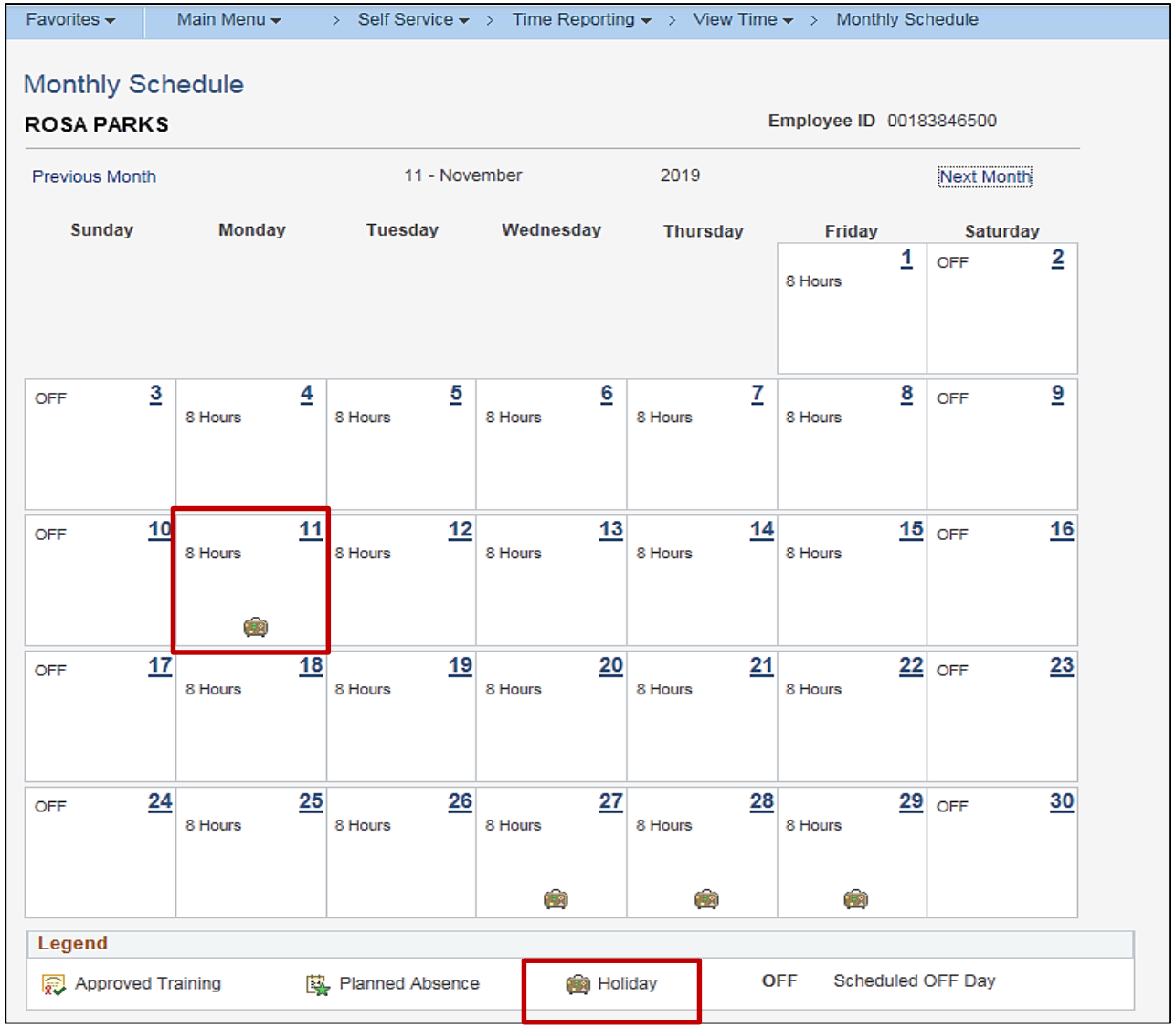


Holidays and Entering Floating Holidays

You can view Holidays on the **Monthly Schedule** page in Time and Attendance by clicking on the **suitcase** icon. **<u>These holidays are not visible on the timesheet</u>**.

Navigate to the **Monthly Schedule** page using the following path:

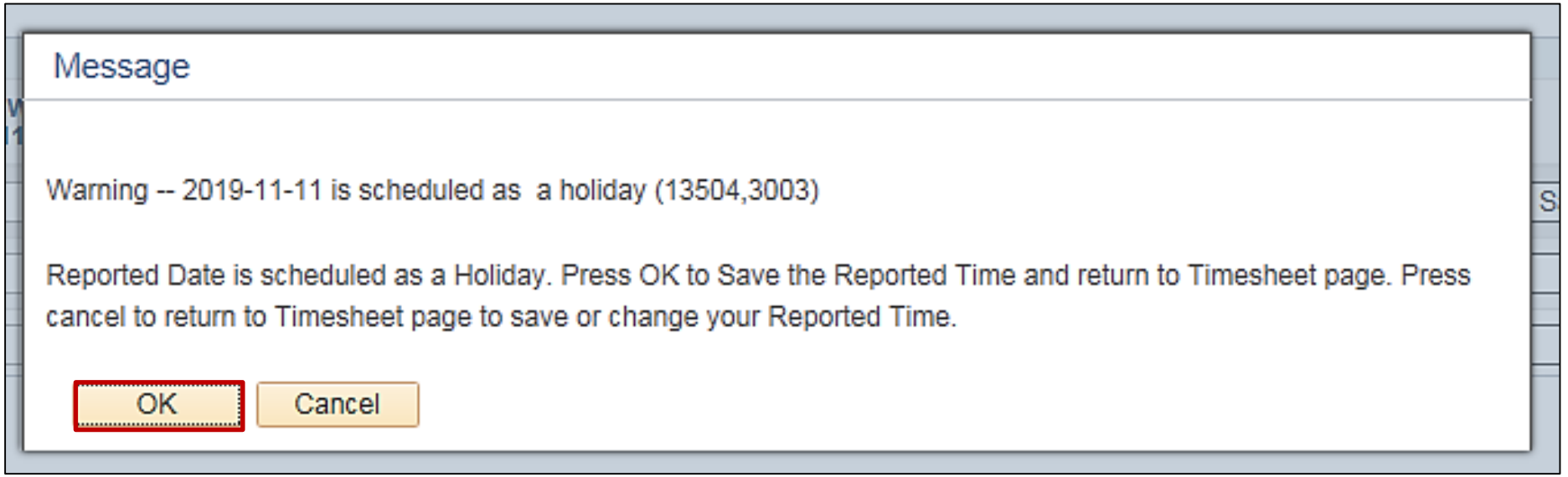
Main Menu > Self Service > Time Reporting > View Time > Monthly Schedule



Working on a Holiday

If you work on a holiday, enter the hours and appropriate TRC on the holiday. The holiday warning message displays when the **Save for Later** or **Submit** button is clicked.

Click the **OK** button to save the reported hours.

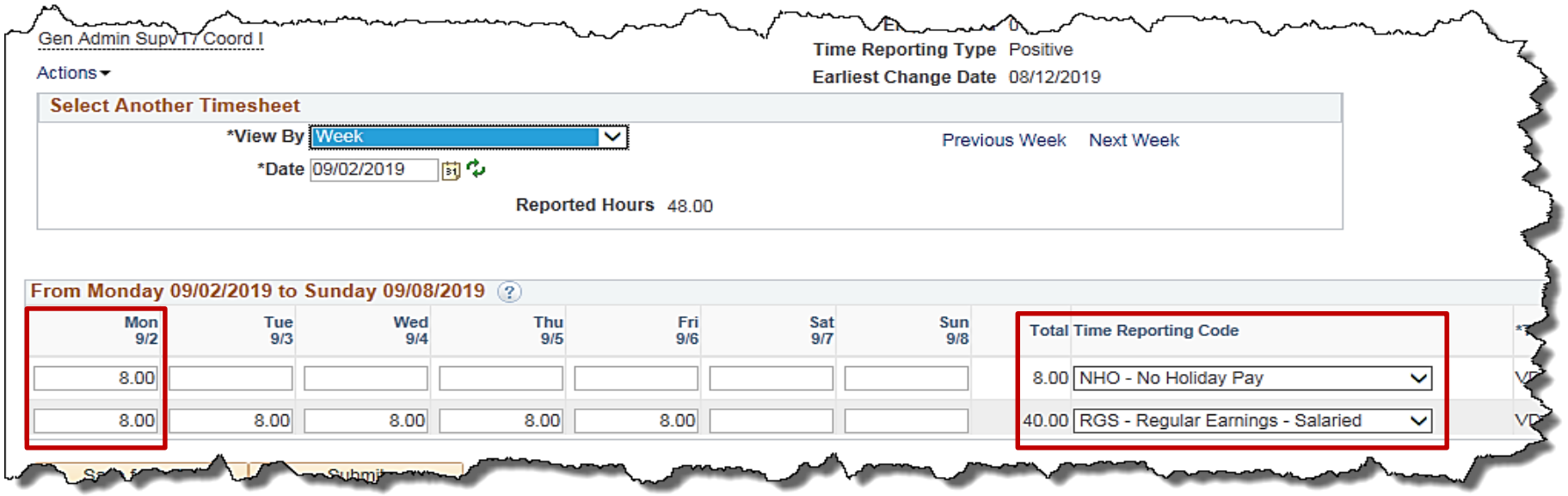


Floating Holiday

A Floating Holiday is a paid day off from work, given as a substitution when an employee works on a holiday. **Floating holidays must be taken during the pay period in which the holiday occurs.** Consult your agency policy and supervisor to see if you are eligible.

For an eligible employee with a floating holiday, instead of the standard holiday:

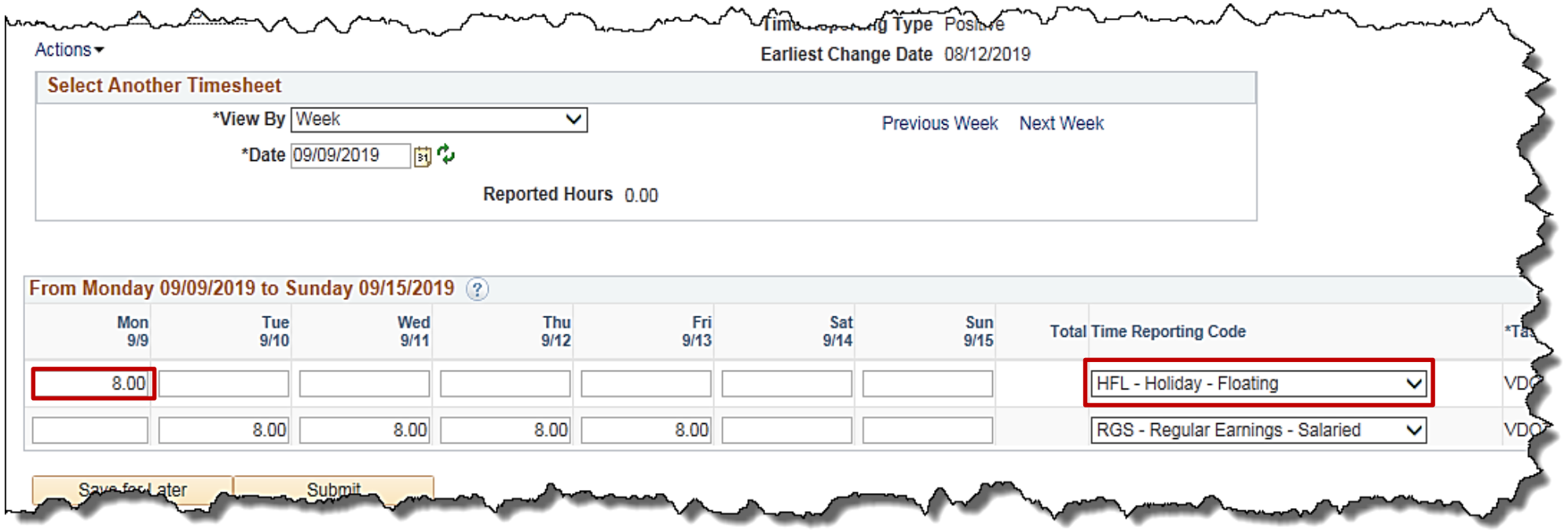
- Row 1 - Enter regular hours worked, and use the **NHO** Time Reporting Code. After entering the **TRC**, click the **ChartFields** link and the charge distribution auto-populates. Click the **OK** button to return to the **Timesheet** page.
- Row 2 - Enter regular hours worked.



Note: Not every employee is permitted to take floating holidays. Before entering a floating holiday on the timesheet, confirm eligibility with the approver.

Floating Holiday (continued)

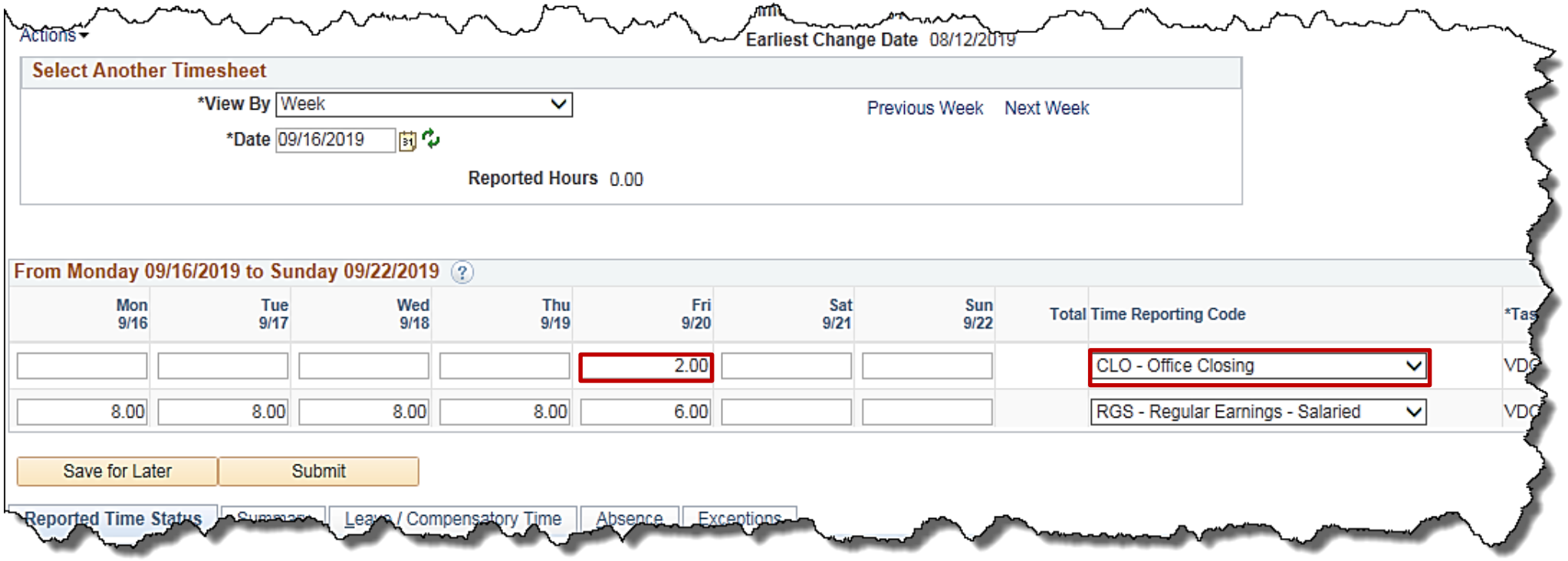
The Time Reporting Code of **HFL** is entered for the day taken as the floating holiday. After entering the **TRC**, click the **ChartFields** link and the charge distribution will auto-populate. Click **OK** to return to the **Timesheet** page.



Office Closing

Office Closings occur when circumstances require emergency closings due to inclement weather, utility failure, fire, or other forced evacuations from the agency or work site.

Use **CLO** as the Time Reporting Code for office closings. The **CLO** Time Reporting Code auto-populates the charge distribution after the **ChartField** link is clicked.



Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.

The Time Administration process will process time for time saved and submitted.

- ○ True
- ○ False

PROPERTIES

On passing, 'Finish' button:	Goes to Next Slide
On failing, 'Finish' button:	Goes to Next Slide
Allow user to leave quiz:	After user has completed quiz
User may view slides after quiz:	At any time
Show in menu as:	Single item

Edit in Quizmaker

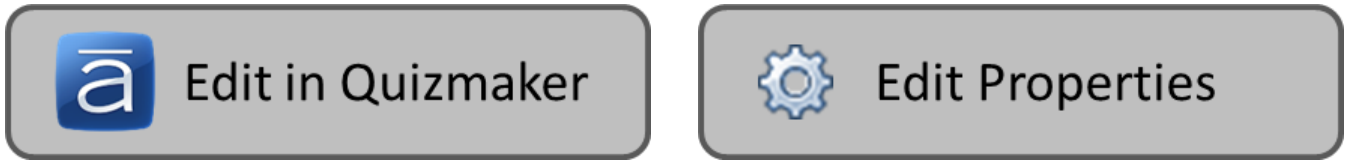
Edit Properties

The weekly time entry format allows you to enter multiple days for each unique combination of Time Reporting Code (TRC) and charge distribution, which reduces duplicate entry.

- ○ True
- ○ False

PROPERTIES

On passing, 'Finish' button:	Goes to Next Slide
On failing, 'Finish' button:	Goes to Next Slide
Allow user to leave quiz:	After user has completed quiz
User may view slides after quiz:	At any time
Show in menu as:	Single item

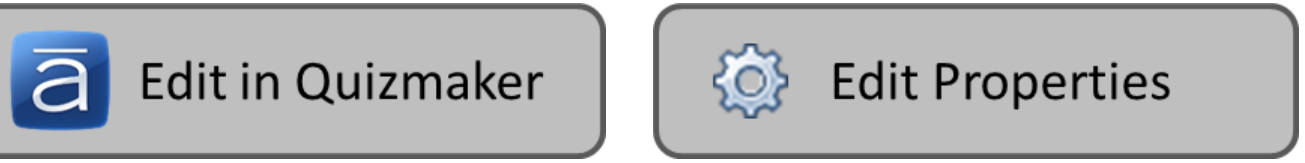


The Timesheets are placed on a temporary _____ at the end of the pay period. This prevents changes to payable time during the allocation process that distributes payroll costs to various projects, cost centers, etc.

- Hold
- Page
- Lockout

PROPERTIES

On passing, 'Finish' button:	Goes to Next Slide
On failing, 'Finish' button:	Goes to Next Slide
Allow user to leave quiz:	After user has completed quiz
User may view slides after quiz:	At any time
Show in menu as:	Single item



Holidays are visible on the _____ page.

- Timesheet
- ChartField Distribution
- Monthly Schedule

PROPERTIES

- All of the above

On passing, 'Finish' button: Goes to Next Slide

On failing, 'Finish' button: Goes to Next Slide

Allow user to leave quiz: After user has completed quiz

User may view slides after quiz: At any time

Show in menu as: Single item

Edit in Quizmaker | Edit Properties

Lesson 3: Summary

3 Entering and Viewing Time and Holidays

In this lesson, you learned:

- Enter hours, choose a Time Reporting Code, and enter a charge distribution by day.
- Enter a charge distribution, search for and select the appropriate SpeedType, and enter additional ChartField values as needed.
- Review time the day after submission and check it for any exceptions.
- View compensatory leave and overtime leave balances on the Timesheet page.

Lesson 4: Introduction

4 Viewing Absence Balances and Entering Absence Requests

This lesson covers the following topics:

- Viewing current and future Absence Entitlement Balances
- Entering and submitting Absence Requests

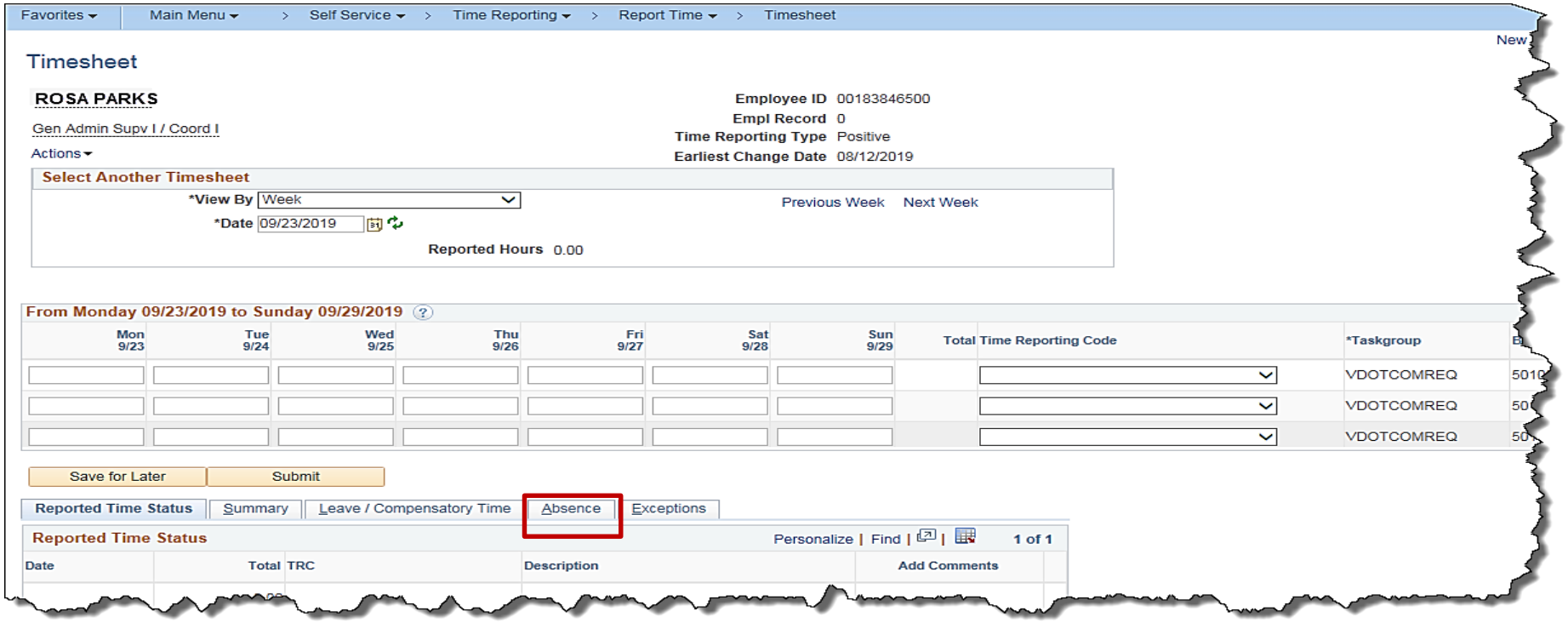
Navigate to Absence Events and Balances

You can enter and submit absence requests and view absence related balances from the **Timesheet** page.

Navigate to the **Timesheet** page using the following navigation path:

Main Menu > Self Service > Time Reporting > Report Time > Timesheet

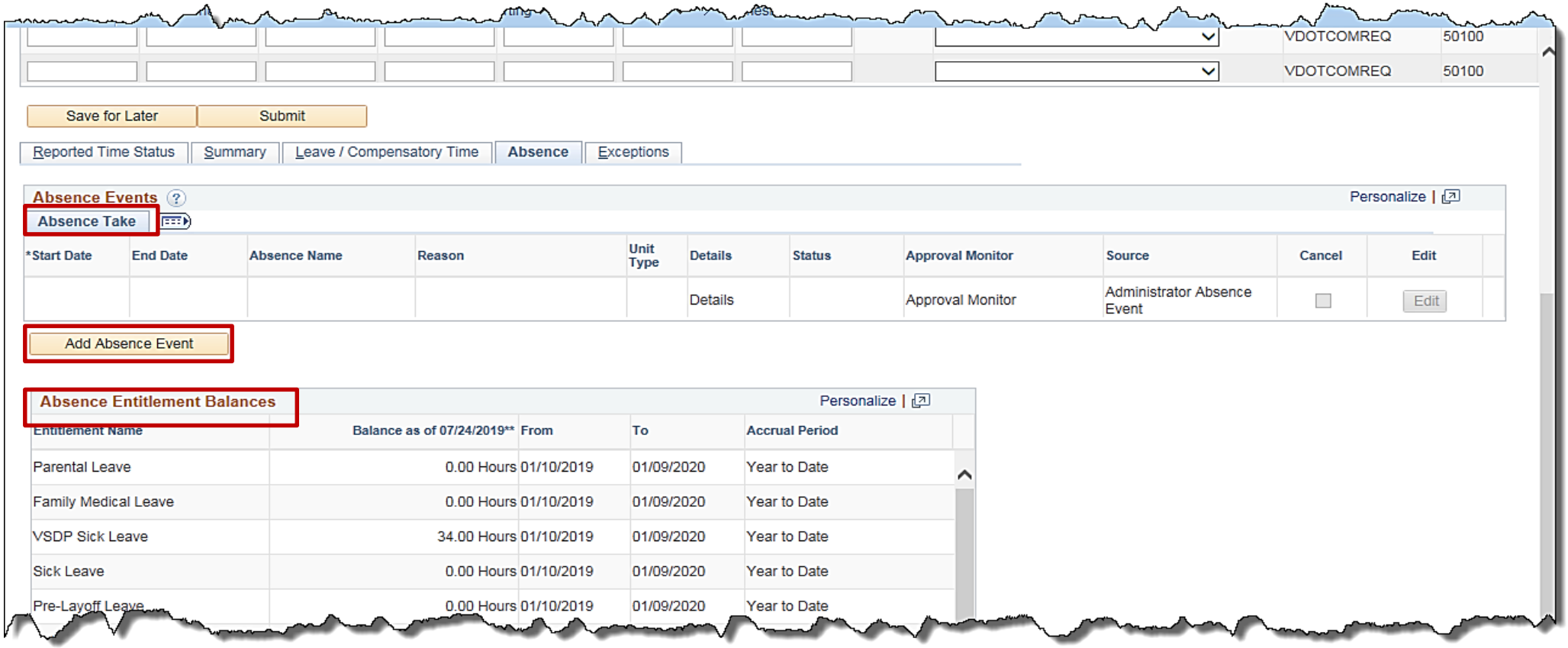
Scroll down on the Timesheet and click the **Absence** tab to expand the **Absence Events** section.



Viewing Absence Events Section

The **Absence Events** section contains the following:

- **Absence Take** tab
- **Add Absence Event** button
- **Absence Entitlement Balances** section



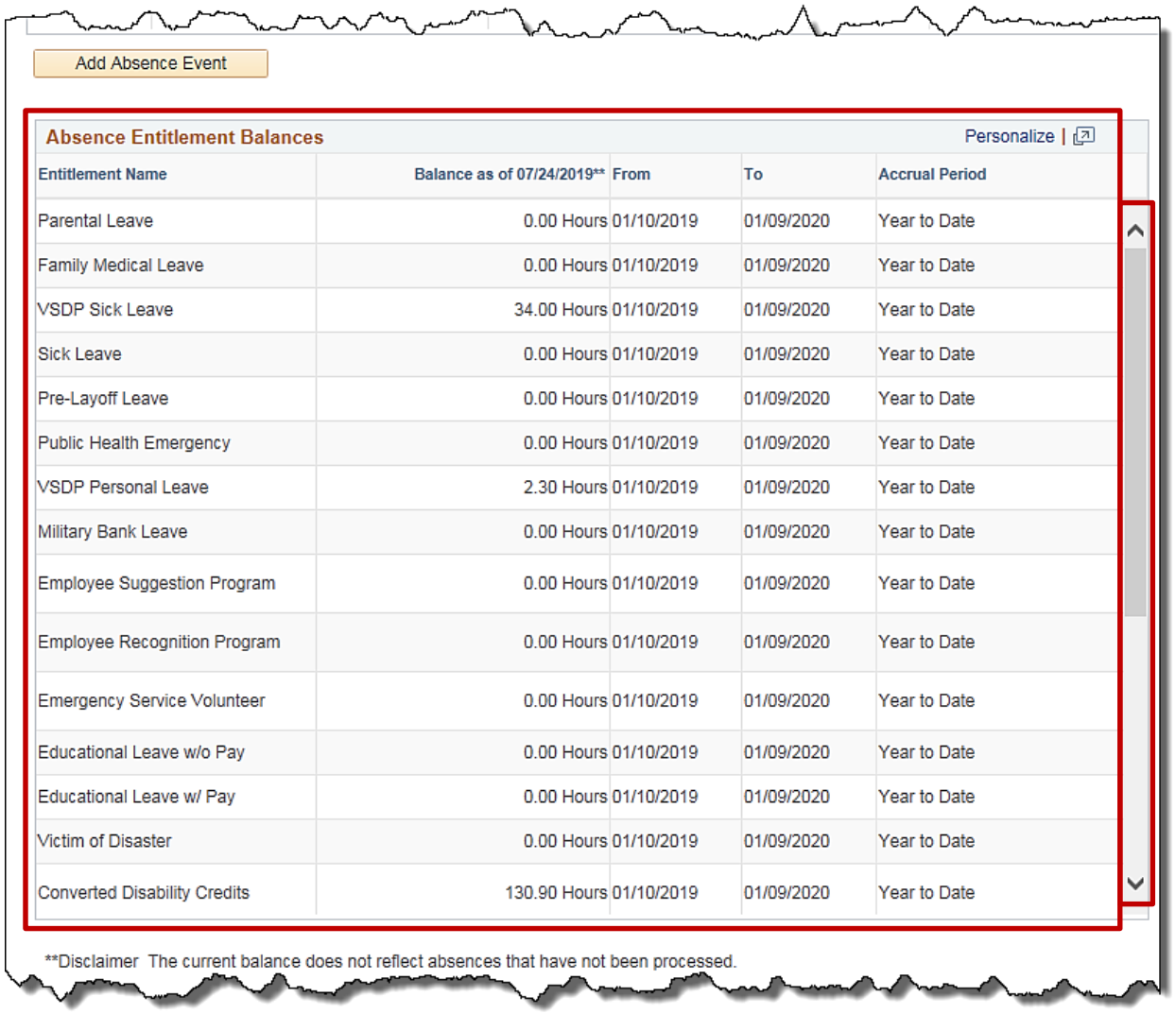
Viewing Current Absence Entitlement Balances

The **Absence Entitlement Balances** section of the timesheet provides a view of absence balances (excluding Compensatory and Overtime leave).

It shows absence balances as of the most recently finalized and closed pay period.

These balances do **not** reflect absence events entered or entitlements earned in the current pay period.

Use the scrollbar on the side to view all absence balances.


Add Absence Event

Absence Entitlement Balances Personalize |

Entitlement Name	Balance as of 07/24/2019**	From	To	Accrual Period
Parental Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Family Medical Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
VSDP Sick Leave	34.00 Hours	01/10/2019	01/09/2020	Year to Date
Sick Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Pre-Layoff Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Public Health Emergency	0.00 Hours	01/10/2019	01/09/2020	Year to Date
VSDP Personal Leave	2.30 Hours	01/10/2019	01/09/2020	Year to Date
Military Bank Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Employee Suggestion Program	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Employee Recognition Program	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Emergency Service Volunteer	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Educational Leave w/o Pay	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Educational Leave w/ Pay	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Victim of Disaster	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Converted Disability Credits	130.90 Hours	01/10/2019	01/09/2020	Year to Date

**Disclaimer The current balance does not reflect absences that have not been processed.

Absence Entry Fields

PROPERTIES

Show interaction in menu as: Single item

Allow user to leave interaction: At any time

Prev/Next player buttons go to: Step in interaction

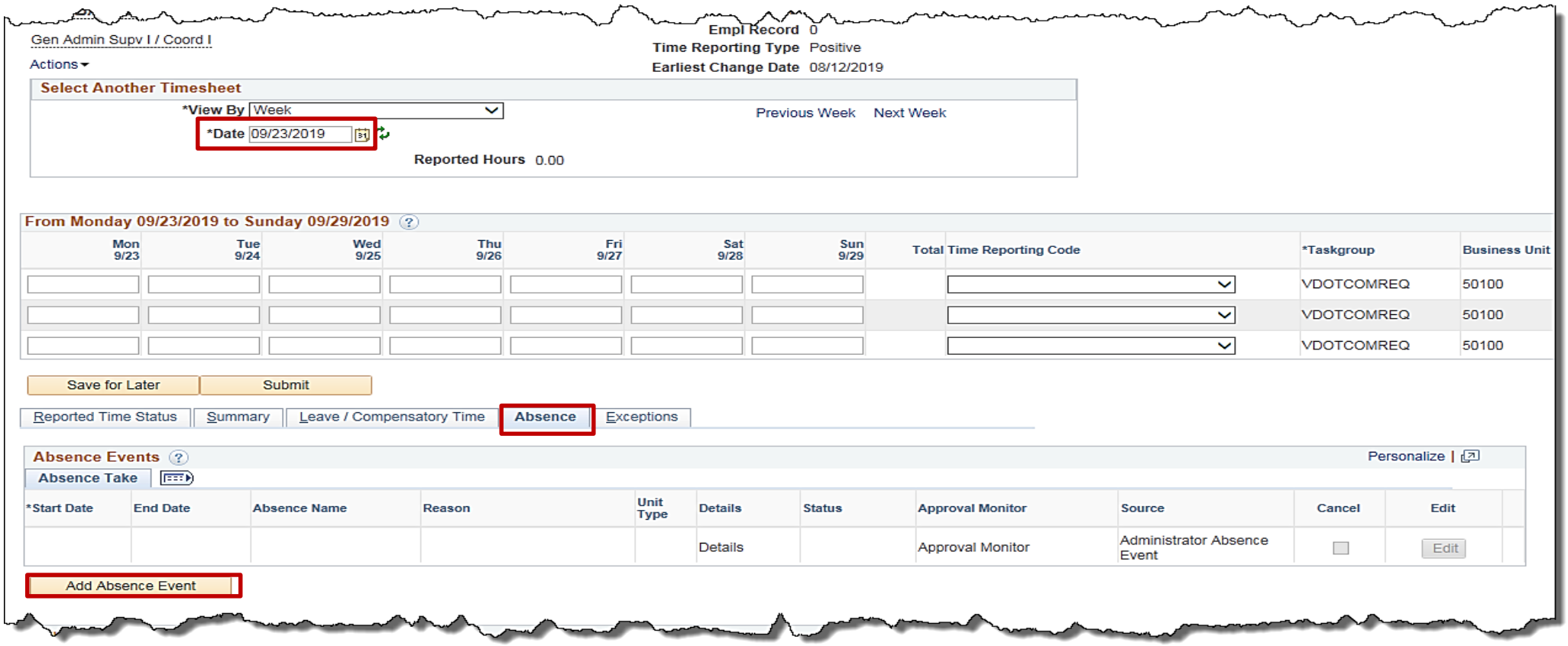
Edit in Engage

Edit Properties

Entering an Absence Request

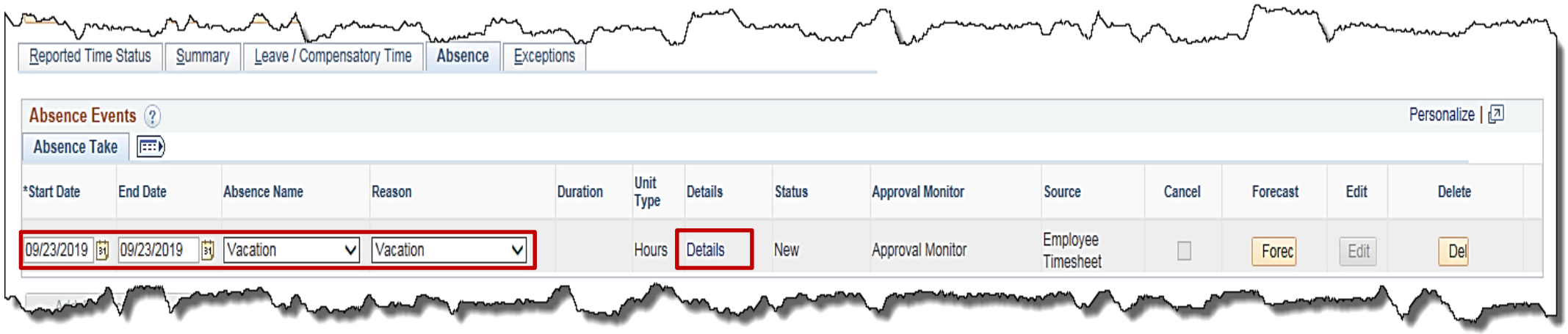
To enter an absence request:

- Enter or select the week that contains the begin date of your leave request.
- Click the **Absence** tab.
- Click the **Add Absence Event** button under the **Absence Events** section.



Entering an Absence Request (continued)

- Populate the following required fields on the **Absence Take** tab:
  - Enter **Start Date**
  - Enter **End Date**
  - Select **Absence Name**
  - Select **Reason**
  - Click the **Details** link

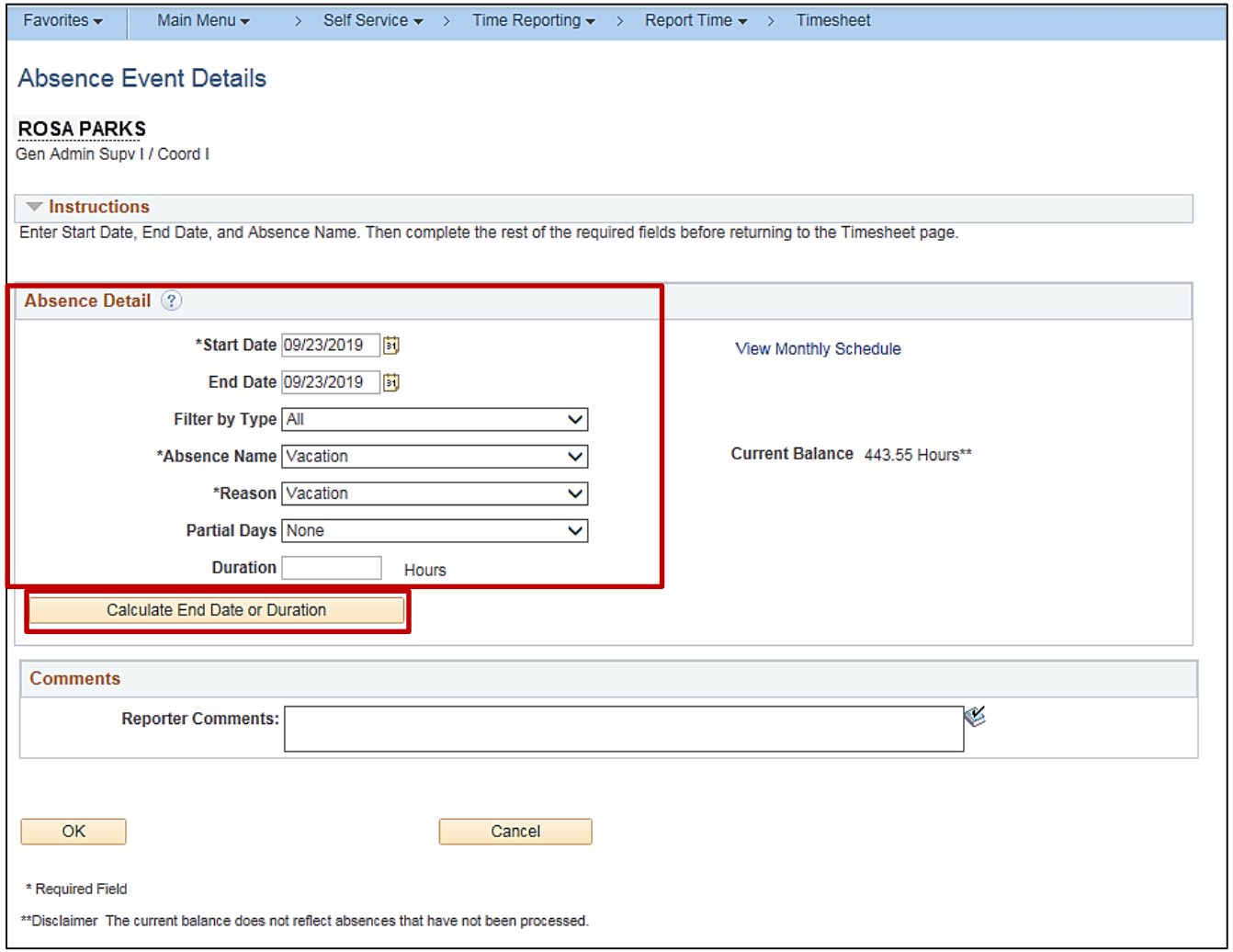


Entering an Absence Request (continued)

The **Absence Events Details** page displays. Cardinal auto-populates any information already entered in the **Absence Event** section of the **Timesheet** page.

Cardinal uses both the employee schedule and the information entered in the **Absence Event Details** page to automatically calculate the total hours (duration) of the absence.

If the absence is for the full scheduled work day, click the **Calculate End Date or Duration** button to display the calculated absence hours.

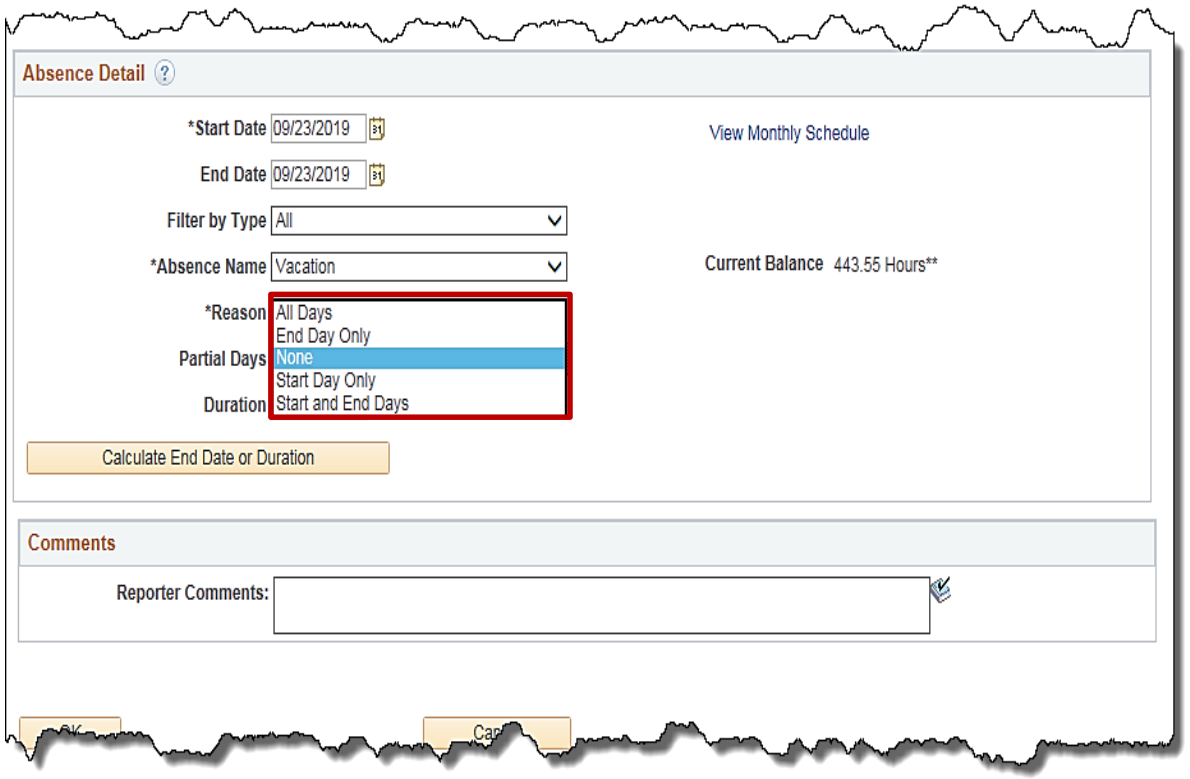


Partial Day Options

If the absence is for a partial day, select the **Partial Days** drop-down.

There are five options to choose from:

- **All Days -** Use if the days entered are all partial days. **Select this option when taking one partial day of leave.**
- **End Day Only -** Use this when the last day only is a partial day.
- **None -** This is the default value. Do not change this if none of the days are partial days.
- **Start Day Only -** Use when the first day only is a partial day.
- **Start and End Days -** Use when the first and last days are partial days.



Partial Day Options (continued)

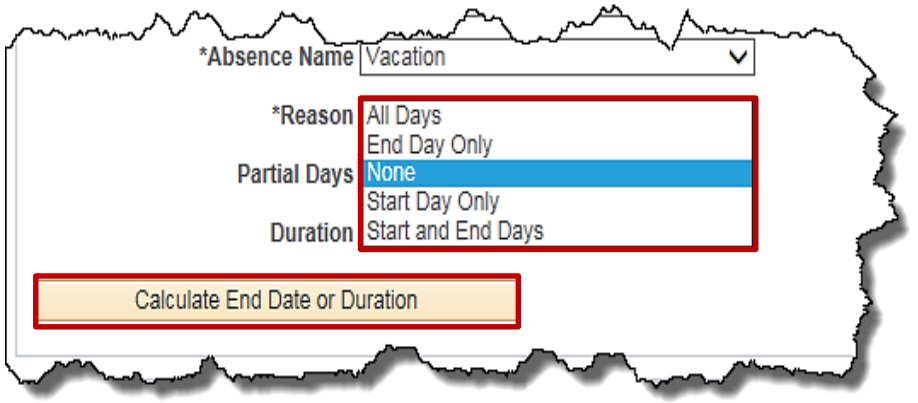
If the absence does not fit any of these options, then more than one request (meeting all the needed absences conditions) will need to be entered.

For example, if an employee is taking three days off and the middle day only is a partial day, enter this as two requests:

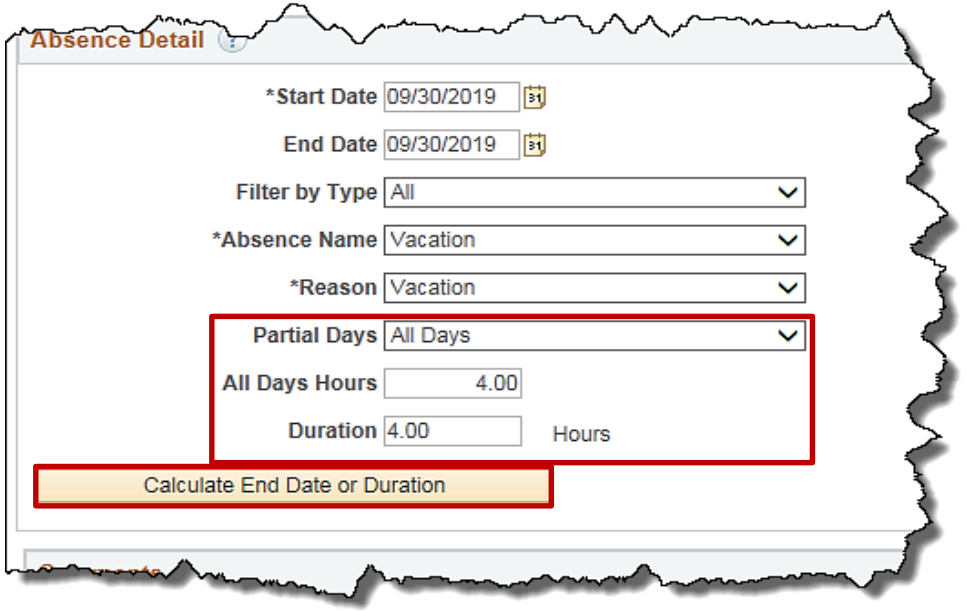
- Request one - Enter the first day as one request (full day).
- Request two - Enter the second day (partial) and third day (full) – using the **Start Day Only** option.

If a partial option is selected, you will be required to enter **Partial Hours**.

Click the **Calculate End Date or Duration** button after entering an absence request to calculate the duration.



Partial Hours

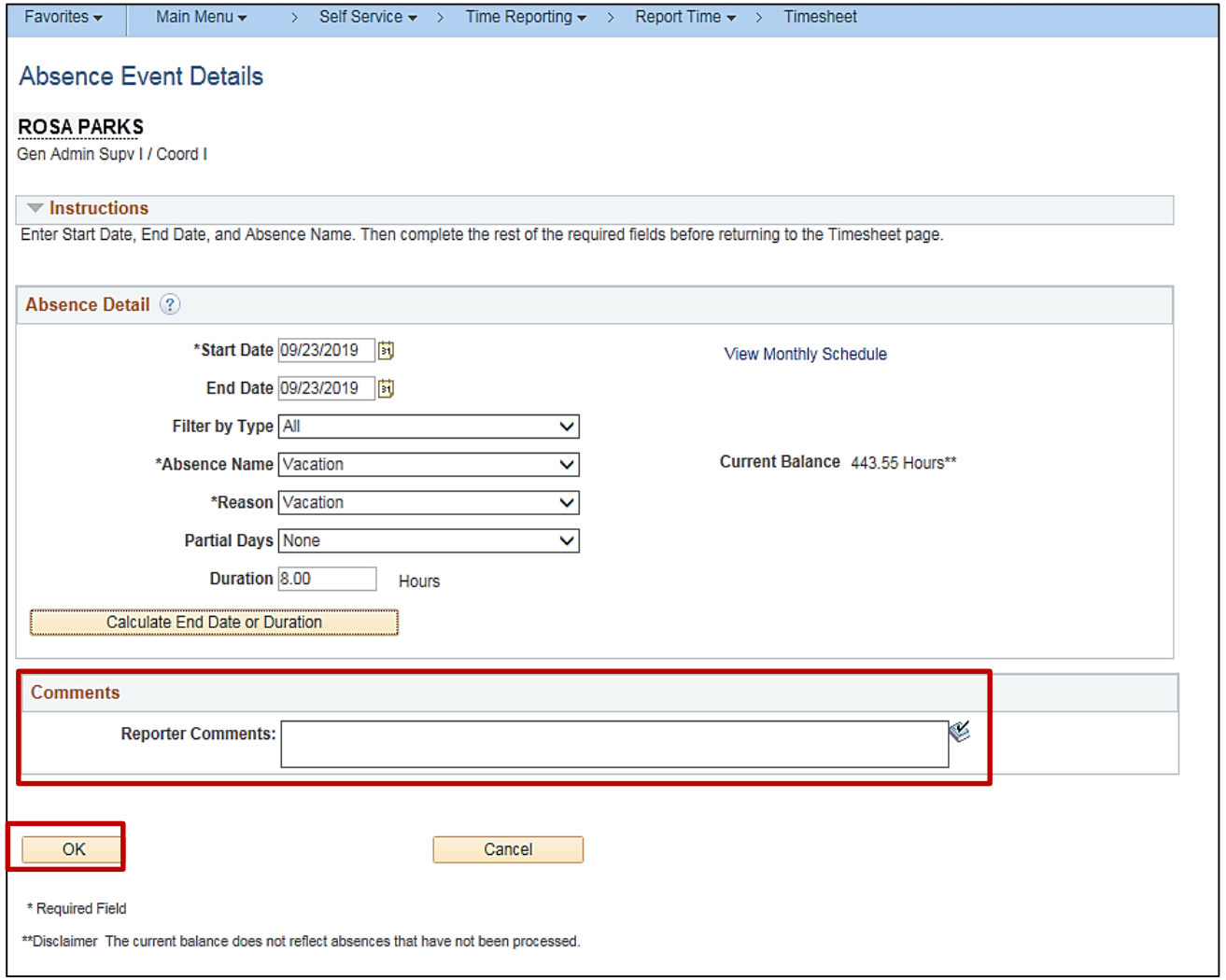


Reporter Comments

The **Reporter Comments** field allows entry of comments regarding the absence, if needed.

Important Note: If comments are entered in this field, the comments can be viewed by anyone with access to these pages. For that reason, use caution if entering personal information.

After entering all required information on the **Absence Event Details** page, click the **OK** button to return to the **Absence Take** tab.



Forecast Absence Event

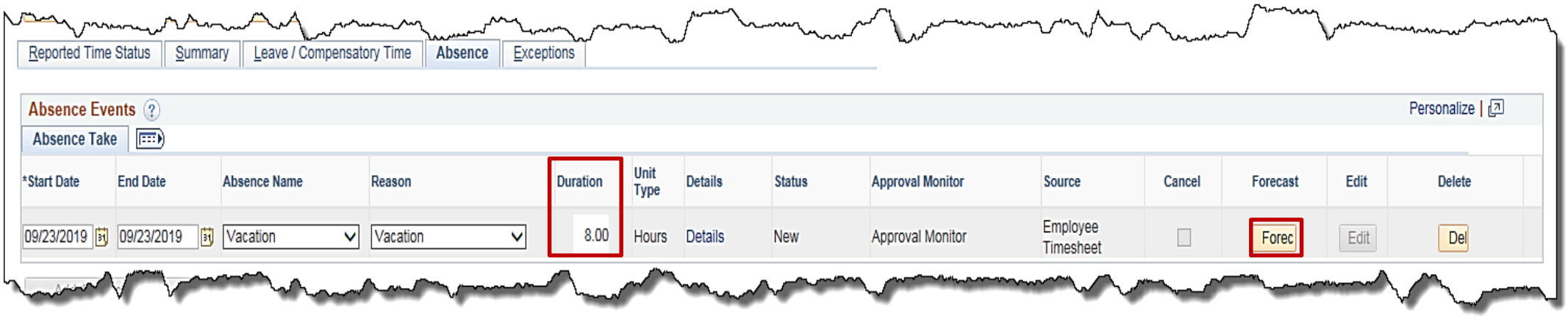
When the **Absence Take** tab returns, the **Duration** field populates with the hours for the absence.

Most absence types require the employee to forecast his/her projected balances prior to submitting a request. The forecast process calculates anticipated balances up through the date being requested based on:

- All prior absence requests for that absence type (e.g., vacation, anticipated entitlements)
- Any scheduled increases in the employee leave accruals

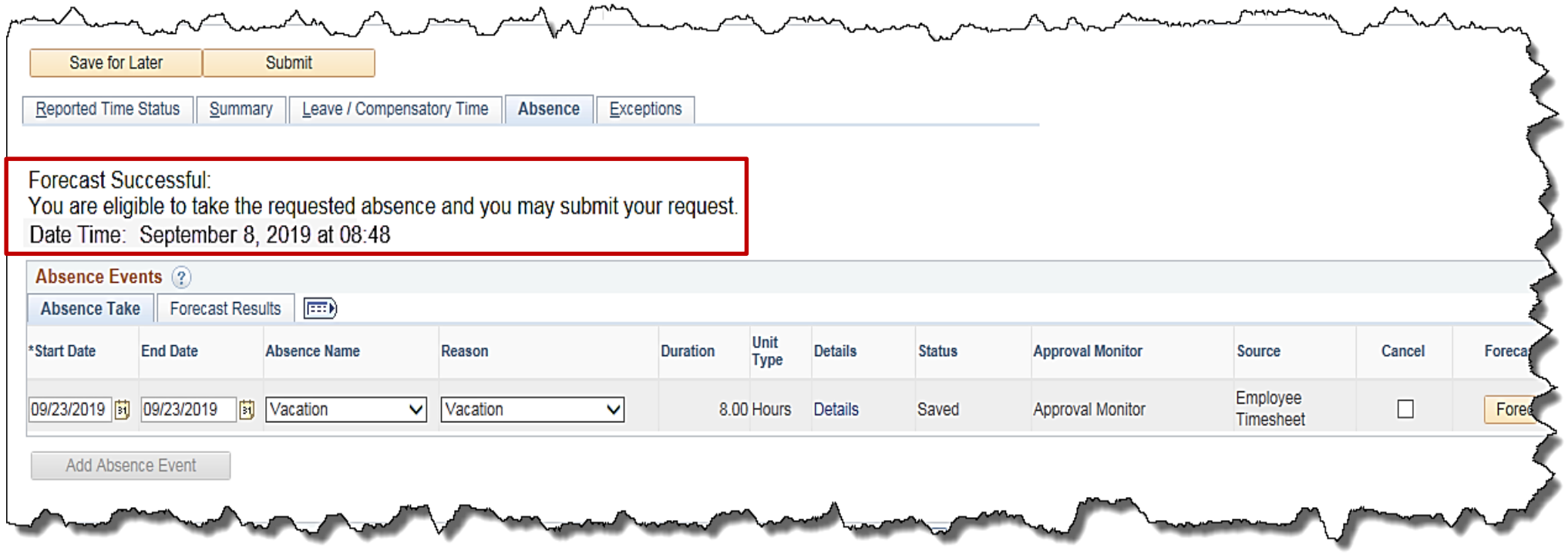
If the absence type requires forecasting, the **Forecast** button is enabled after selecting the **Absence Name** when making a new absence request.

Click the **Forecast** button to determine whether there is enough entitlement to cover the request.



Forecast Absence Event (continued)

If there is sufficient time available for the type of absence selected, the following **Forecast Successful** message displays and the **Submit** button should be clicked immediately.



Insufficient Absence Balance

When an employee makes an absence request and does not have the sufficient entitlement balance, Cardinal displays the message below when the forecast is made:

Forecast Error:
You do not have sufficient leave balance for the date(s) or duration requested. Your forecasted balance includes current balance and projected accrual, less any approved, submitted, pushed back, or saved absence requests for this leave type, up through the begin date of this request. In order to submit this request, you can do one of the following: 1) Modify this request (change the dates, duration, or leave type) 2) Cancel or modify approved, submitted, pushed back, or saved requests for this leave type 3) Use the Leave Without Pay absence type (the absence will be unpaid)
Date Time: December 14,2016 at 17:48

Note: The pushed back option will not be used in Cardinal.

Absence Request that Crosses Pay Periods

When entering an absence request, be sure that the time requested is within the same pay period. Pay periods run from the 10th through the 24th of the month and the 25th of the month through the 9th of the next month. If the absence crosses into another pay period, enter it as two requests.

For example, to take vacation from 5/15 – 5/19, enter the request as follows:

- Request #1: 5/15
  - Enter or select the week that contains the begin date of the first request.
  - Enter the leave request by clicking the **Add Absence** button under the **Absence Event** section.
  - Click the **Forecast** button. The **Forecast Successful** message displays.
  - Click the **Submit** button.

- Request #2: 5/16 - 5/19
  - Enter the week that contains the begin date of the second request.
  - Enter the leave request by clicking the **Add Absence** button under the **Absence Event** section.
  - Click the **Forecast** button.
  - The **Forecast Successful** message displays.
  - Click the **Submit** button.

Future Absence Requests

Cardinal allows entry of absences 90 days into the future and six pay periods into the past, but not prior to the beginning of the current fiscal year. If 90 days from the current day falls in the middle of the week, Cardinal allows entry of absence events for any day of that week where the 90 day limit falls.

If you try to enter a future absence request which exceeds the 90 days, Cardinal disables the **Add Absence Event** button to prevent absences being entered outside the 90 day timeframe.

Always re-check your forecast balance close to the date(s) of your planned absences. This is to check that if you enter an absence request for a future date but use that same absence type before the future date, you may not have sufficient hours to cover the request when the time comes. **Any portion of the absence that exceeds the entitlement balance is treated as leave without pay.**

Future Absence Requests (continued)

For example:

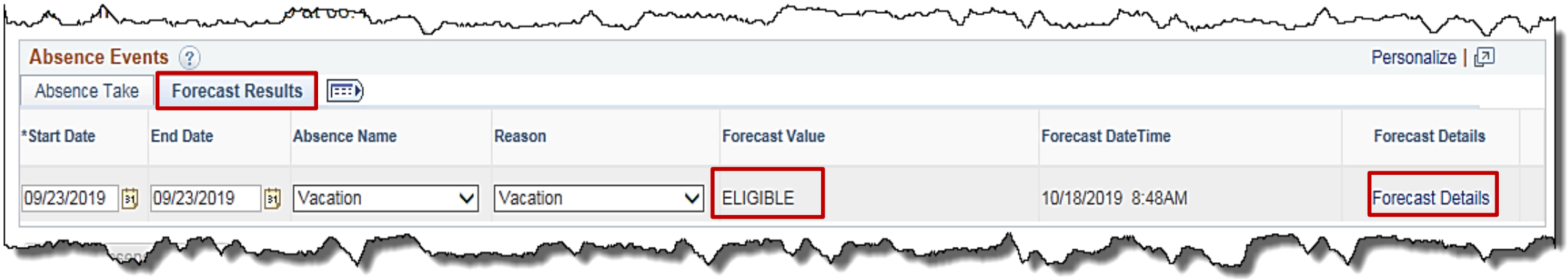
- An employee has 32 hours of personal leave.
- The employee submits an absence request for 32 hours of personal leave for a trip three months from now. The forecast is successful and the absence request is approved.
- Two weeks later, the employee takes 16 hours of personal leave to visit a sick relative.
- **The future request now becomes ineligible because the employee has now taken 16 of those 32 hours.**
- When the employee re-checks the balances, there will only be 16 hours of available personal leave available.
- If the employee does not update the absence request, 16 hours is processed as personal leave and 16 hours is processed as leave without pay.
- **To avoid being on leave without pay, edit the future request.**

Absence Balance Verification

To verify that there are still sufficient balances for the absence, click on the **Absence Event** link and then select the **Forecast Results** tab. Check the **Forecast Value** tab to determine if there is still sufficient leave available. If not, edit the request and/or use a different type of leave for the time off.

You can also click on the **Forecast Details** link to view the number of hours expected to be paid and/or unpaid, and the remaining balance after the absence has been deducted.

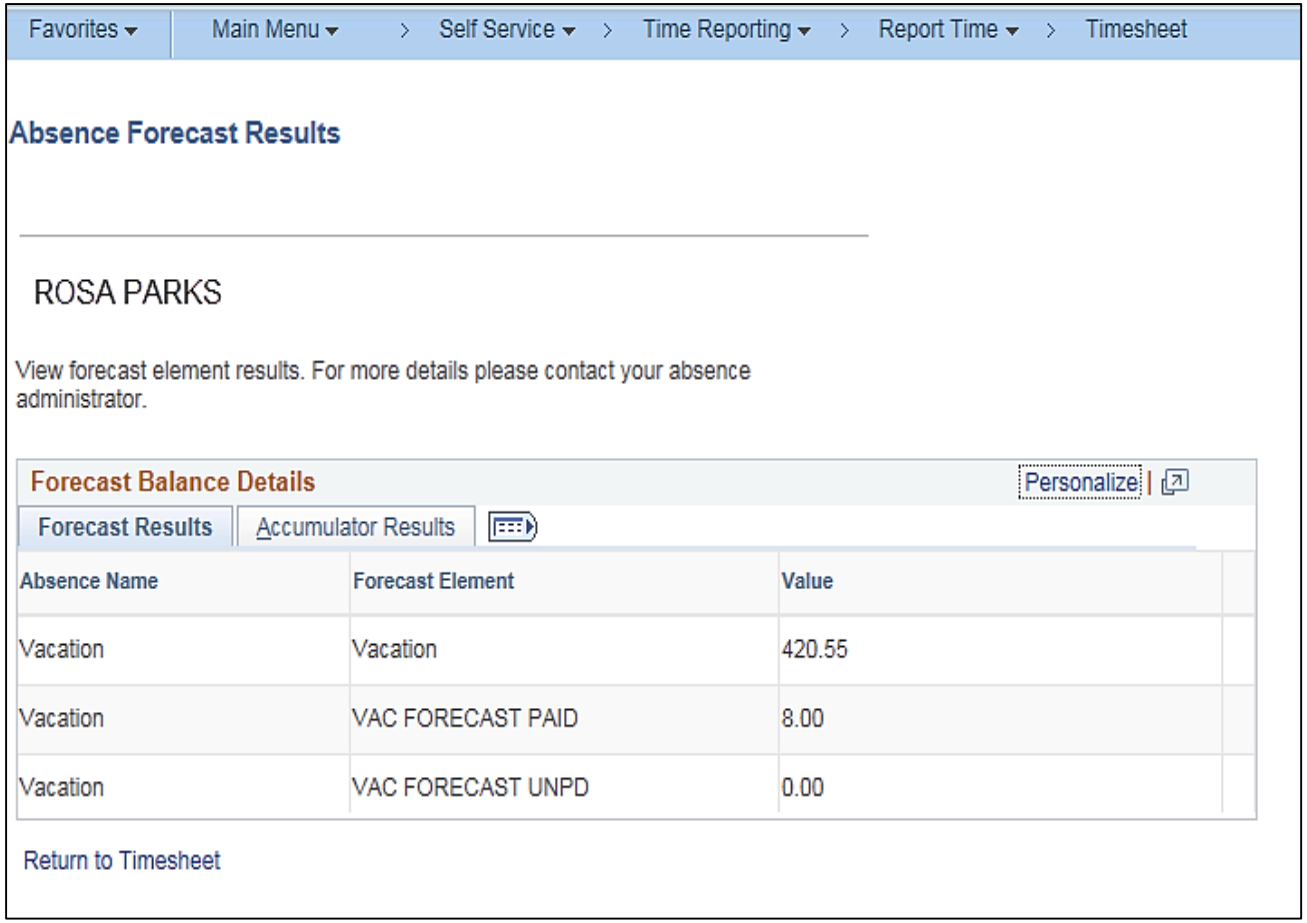
Remember to adjust absence requests that have insufficient balances; otherwise, Cardinal processes it as leave without pay.



Absence Balance Verification (continued)

You can also click on the **Forecast Details** link to view the number of hours expected to be paid and/or unpaid, and the remaining balance after the absence has been deducted.

Remember to adjust absence requests that have insufficient balances; otherwise, Cardinal processes it as leave without pay.



When to Enter and Submit Absence Requests

Enter and submit absences in advance whenever possible.

Enter and submit planned absences as soon as the need for the leave is known in order to obtain advance approval from the approver.

Enter and submit unplanned absences, such as sick leave, upon returning from the leave.

Submit absences immediately by clicking the **Submit** button each time an absence event is entered or edited.

Save for Later Option with Absences

The **Save for Later** button allows you to save an absence entry and complete it at a later date. It does not, however, submit the absence through workflow to the approver for approval. If you enter an absence event and navigate away from the page without saving or submitting it, Cardinal saves your absence request.

Clicking the **Submit** button on the timesheet does **not** submit absences in a **Saved** status that appear on the timesheet grid. The **Submit** button on the timesheet only submits time (hours worked and comp/OT leave that shows in the Timesheet grid) and absences not **Saved for Later**.

It is strongly recommended when entering an absence that you do not Save for Later and that you do Submit the absence upon entering it or with the timesheet.

To submit an absence event that is in **Saved** status, perform the following steps:

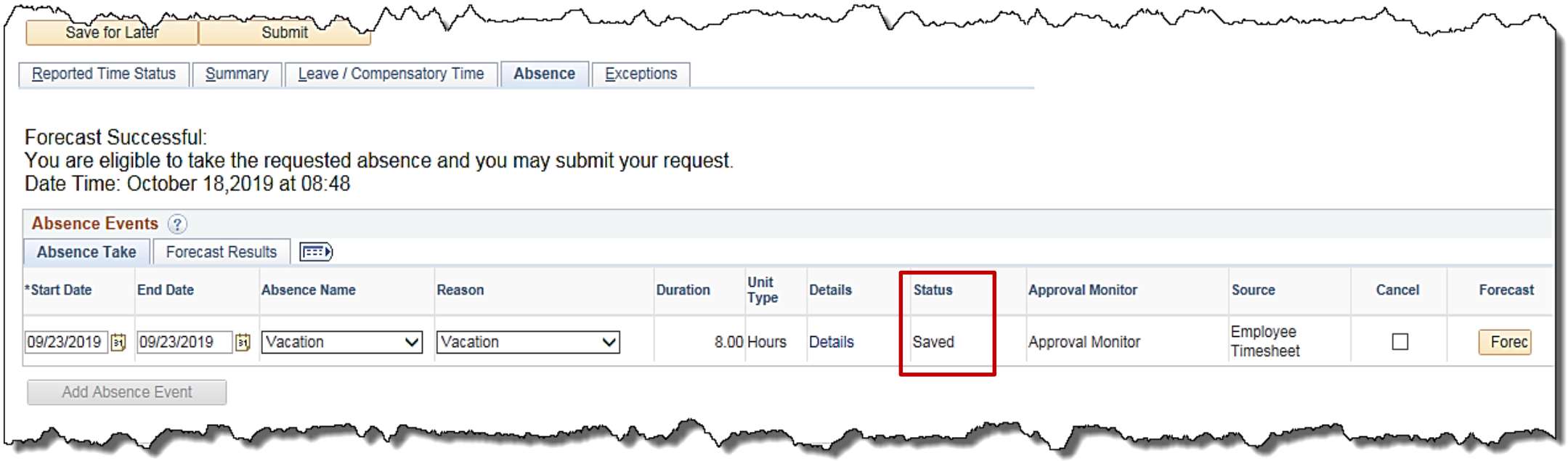
- If the **Edit** button is enabled, click the Edit button to make change or submit. If the Edit button is not enabled (grayed out), then make the change/reforecast directly on the timesheet and submit.
- Make any changes to the request that are needed.
- Click the **Forecast** button (if applicable).
- Click the **Submit** button at the bottom of the page.

Repeat this process for all saved absence events, one at a time.

Remember, clicking the **Submit** button on the timesheet only submits time on the timesheet. It does not submit absences in **Saved** status.

Checking the Absence Status

The **Status** column in the **Absence Event** section displays the current status of the absence event. The **Reported Time Status** section displays absences and their status, by date.



Absence Approval or Denial

The approver may approve or deny an absence request. Once the approver reviews and takes action regarding the absence request, the status is updated on the **Timesheet** page. You can view the status in the **Reported Time Status** section and in the **Absence Events** section under the **Status** field.

Cardinal notifies the employee via email if an absence request is denied by the approver.

If the approver approves or denies the request, Cardinal allows the employee to edit the request. For example, if you planned to use four hours of vacation, but only use two, you can edit the request and adjust the hours. Be sure to **Submit** it right away.

FMLA, STD, and WCL Absences

Some absence types must be assigned and/or entered by the Absence Management Administrator:

- **FMLA** (Family Medical Leave Act): The Absence Management Administrator must enter a balance before it can be used and forecasted successfully on the timesheet. Contact Human Resources for FMLA requests and for guidance on what to enter on the timesheet.

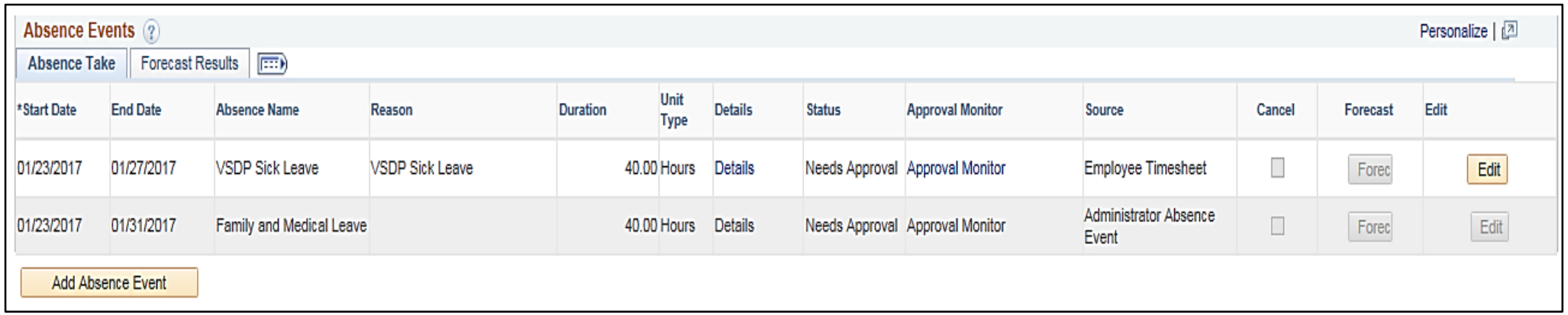
- **STD** (Short Term Disability)/**LTD** (Long Term Disability): Only the Absence Management Administrator can enter these leave types.

- **WCL** (Workers Compensation Leave): Only the Absence Management Administrator can enter this leave type.

Entering FMLA

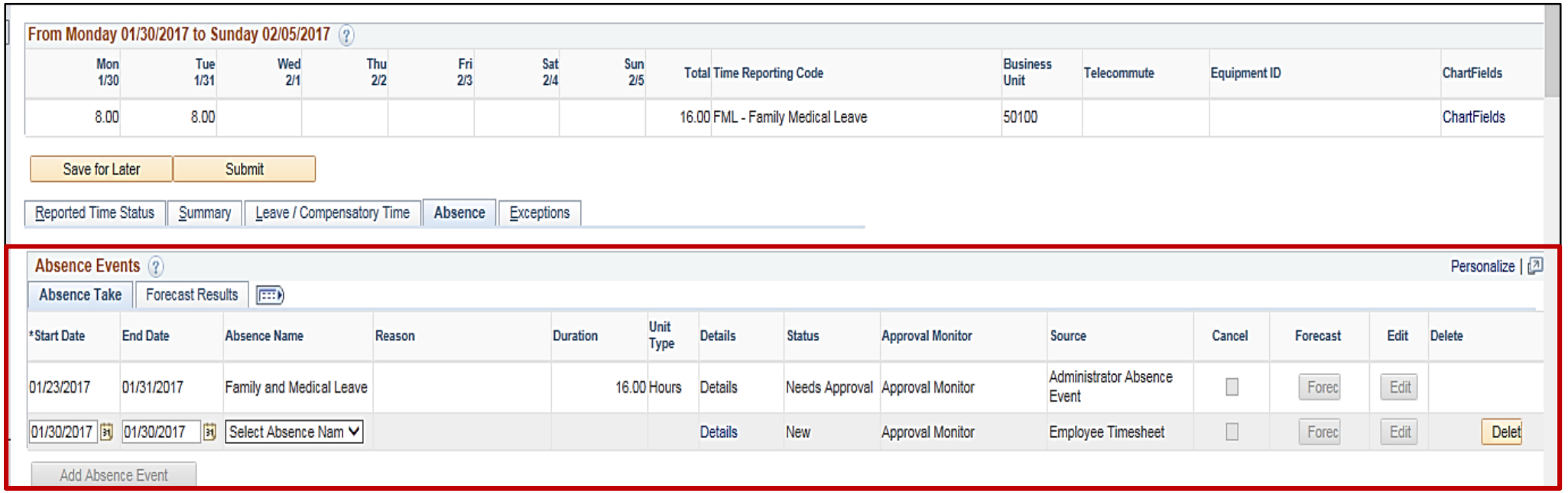
FMLA hours are entered in the absence area on the **Timesheet** page:

- Enter FMLA hours on one row and select the appropriate **Reason**.
- Enter the absence type being used on a second row equal to the FMLA hours on the first row. If there are no paid absence hours available (e.g. VAC, SCK, CPE) then enter leave without pay (LNP).



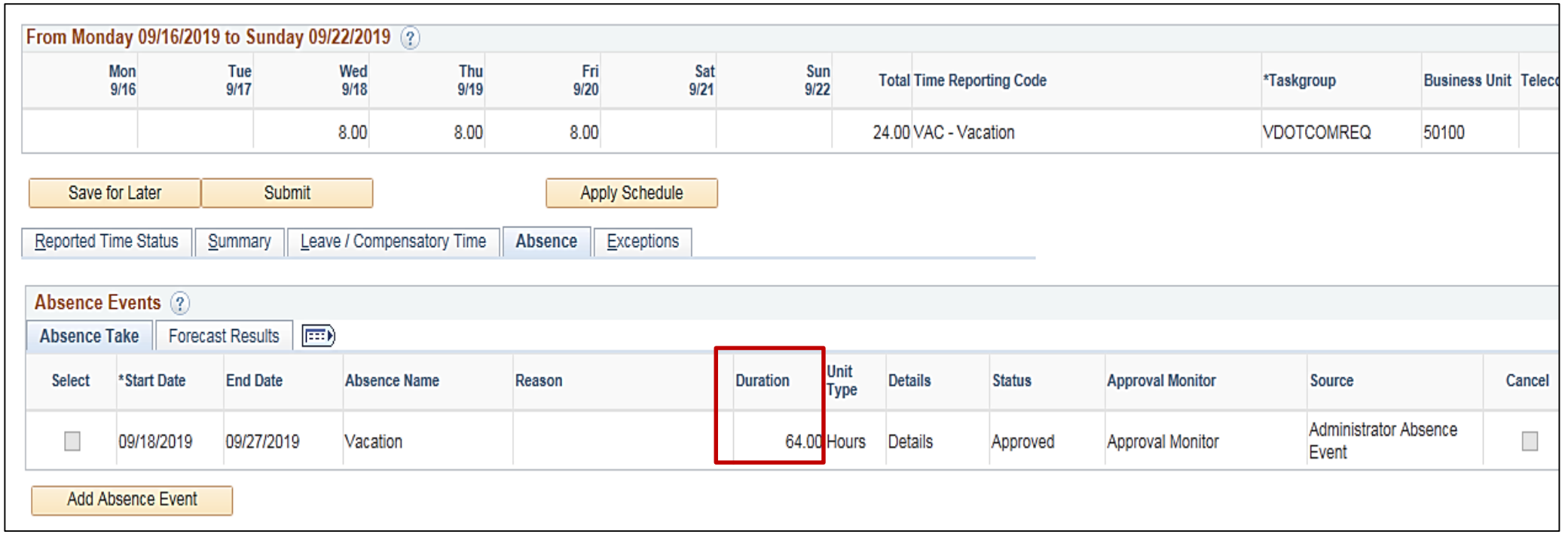
Viewing Current Absence Requests

The **Absence Take** tab displays absence requests for the current week, including those that extend from prior weeks or into future weeks. To view absence requests that have been made for prior weeks or future weeks, go to that week on the timesheet.



Viewing Current Absence Requests (continued)

When an Administrator enters leave on behalf of an employee, the Timesheet will reflect the full duration of the leave versus breaking the leave time out by week. For example: The Administrator enters 64 hours of vacation for an employee (over a 2 week period). The employee's Timesheet leave **Duration** field will display the full duration of the leave (e.g., 64 hours) and not the leave hours for a specific week.



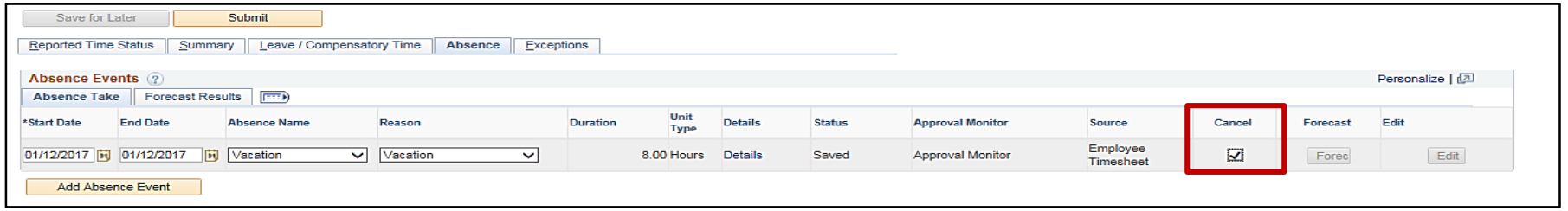
Canceling an Absence Request

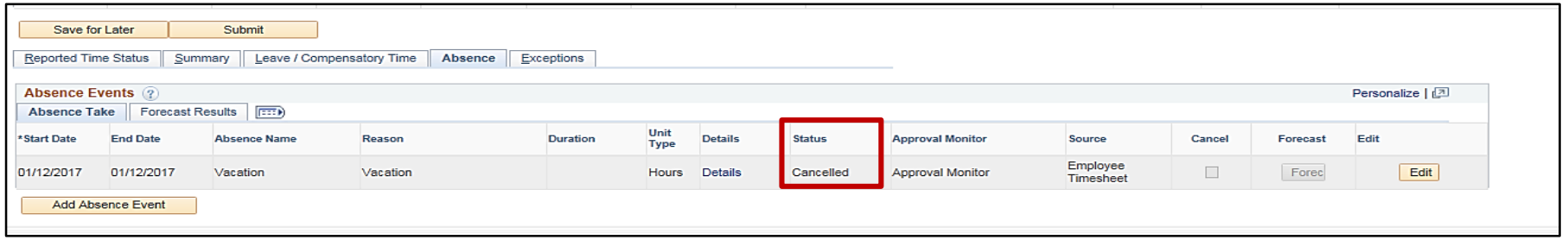
To cancel an absence request:

- Click the **Absence** tab from the **Timesheet** page.
- Click the **Cancel** checkbox.
- Click the **Submit** button immediately.

The status of the absence changes to **Cancelled** and Cardinal adjusts the absence balance after the Absence Calculation process has completed. The employee's Supervisor will receive an email notification of the cancelled absence.

For more detailed information about canceling an absence request, see the job aid entitled **501 TA: Time Entry Scenarios** located on the Cardinal website in **Job Aids** under **Training**.





Lesson 4: Checkpoint

Now is your opportunity to check your understanding of the course material.

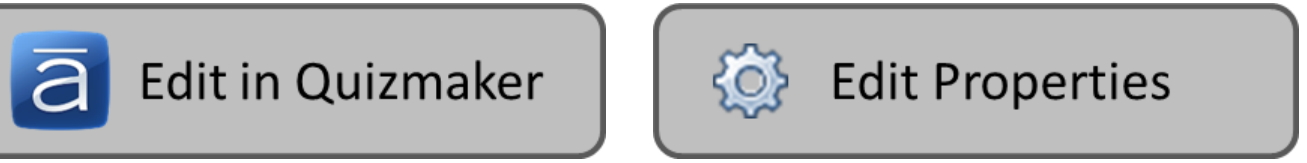
Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.

To enter a new absence request, you click which of the following buttons first:

- Absence Type
- Forecast
- Add Absence Event

PROPERTIES

On passing, 'Finish' button:	Goes to Next Slide
On failing, 'Finish' button:	Goes to Next Slide
Allow user to leave quiz:	After user has completed quiz
User may view slides after quiz:	At any time
Show in menu as:	Single item

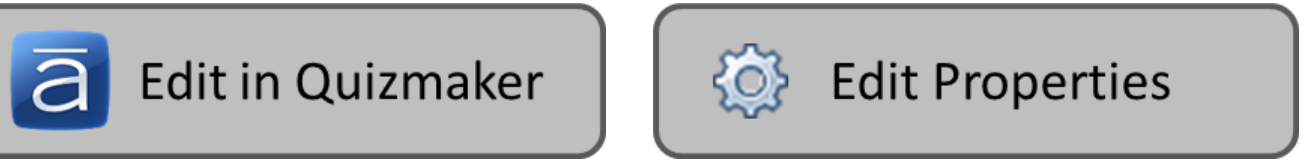


To make a change to an absence event, click the _____ button.

- ○ Cancel
- ○ Forecast
- ○ Edit

PROPERTIES

On passing, 'Finish' button:	Goes to Next Slide
On failing, 'Finish' button:	Goes to Next Slide
Allow user to leave quiz:	After user has completed quiz
User may view slides after quiz:	At any time
Show in menu as:	Single item



Absences should be submitted immediately each time an absence event is entered/edited and forecasted.

- ○ True
- ○ False

PROPERTIES

On passing, 'Finish' button:	Goes to Next Slide
On failing, 'Finish' button:	Goes to Next Slide
Allow user to leave quiz:	After user has completed quiz
User may view slides after quiz:	At any time
Show in menu as:	Single item

Edit in Quizmaker

Edit Properties

Drag and place the steps in order when you need to **Submit** an absence (leave) request that is in the **Saved** status.

1. Click the **Submit** button.
2. Click to expand the **Add Absence Event - select to View** section on the **Timesheet** page.
3. Click the **Edit** button on the row of the absence that is in the **Saved** status that you need to **Submit**.
4. Click the **Forecast** button (if required).

PROPERTIES

On passing, 'Finish' button: Goes to Next Slide

On failing, 'Finish' button: Goes to Next Slide

Allow user to leave quiz: After user has completed quiz

User may view slides after quiz: At any time

Show in menu as: Single item

Edit in Quizmaker

Edit Properties

Lesson 4: Summary

4 Viewing Absence Balances and Entering Absence Requests

In this lesson, you learned:

- An absence request is entered on the **Timesheet** page.
- The **Absence Entitlement Balances** section allows a view of current absence balances (except compensatory leave and overtime leave).
- A new absence request can be entered by clicking on the **Add Absence Event** button in the **Absence Events** section.
- A **Forecast** is required in Cardinal when the **Forecast** button is enabled.
- Cardinal sends the employee an email notification if an absence request is denied by the approver.
- An existing absence request can be edited through the **Timesheet** page.
- Cardinal allows a cancellation of an absence event when the absence is not taken.

Lesson 5: Introduction

5 Timesheet Exceptions and Adjustments

This lesson covers the following topics:

- Understanding Exceptions
- Adjusting Timesheet Entries

Understanding Exceptions

Once the employee submits a timesheet, Time Administration checks it against business rules. The Time Administration process may identify:

- **No exceptions -** Submitted time becomes payable time with no exceptions.

- **Low or medium severity exceptions -** Submitted time becomes payable time with low or medium exceptions.

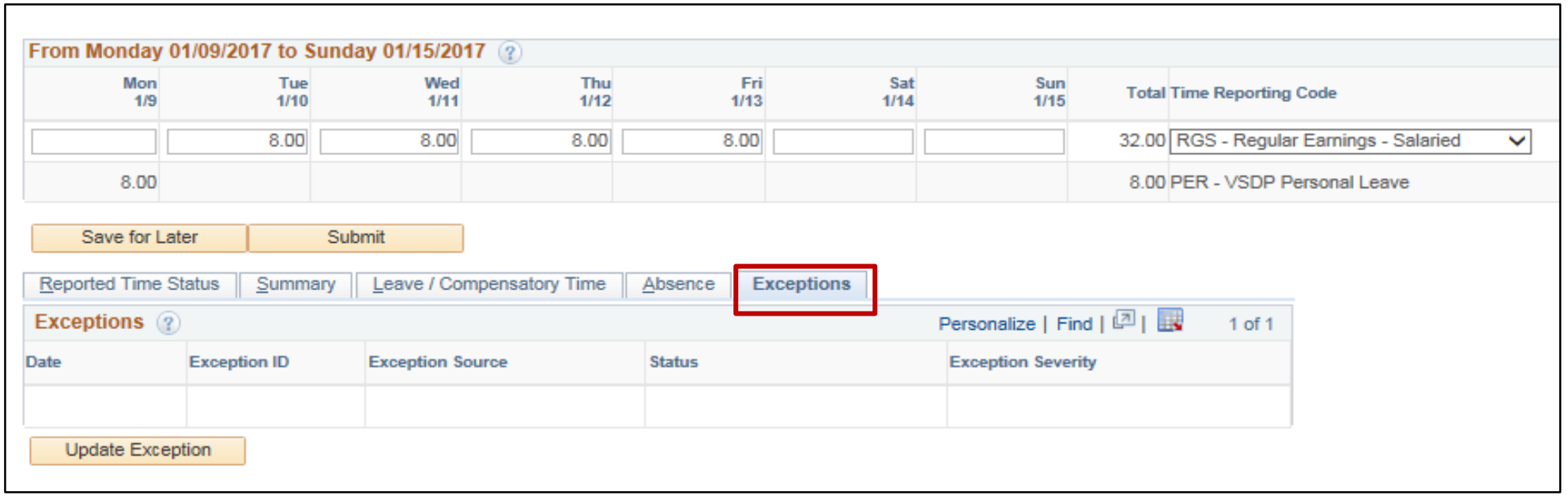
- **High severity exceptions -** Submitted time does not become payable time with a high severity exception. Once corrected, it is resubmitted through Time Administration and becomes payable time when successfully processed.

Understanding Exceptions (continued)

When there are no exceptions with the submitted reported time, it routes to the approver as payable time for approval.

Low and medium severity exceptions still route to approver as payable time for approval. An exception icon will also display on the Reported Time Status tab next to time with exceptions.

Exceptions can be viewed by clicking on the **Exceptions** tab of the **Timesheet** page. If there are no exceptions, no information displays.



Understanding Exceptions (continued)

Even when submitted time is converted into payable time, the timesheet can be adjusted.

For example:

- The approver instructs you to change the timesheet, (e.g., you charged time to the wrong project or charged more hours to regular time than allowed in the pay period).

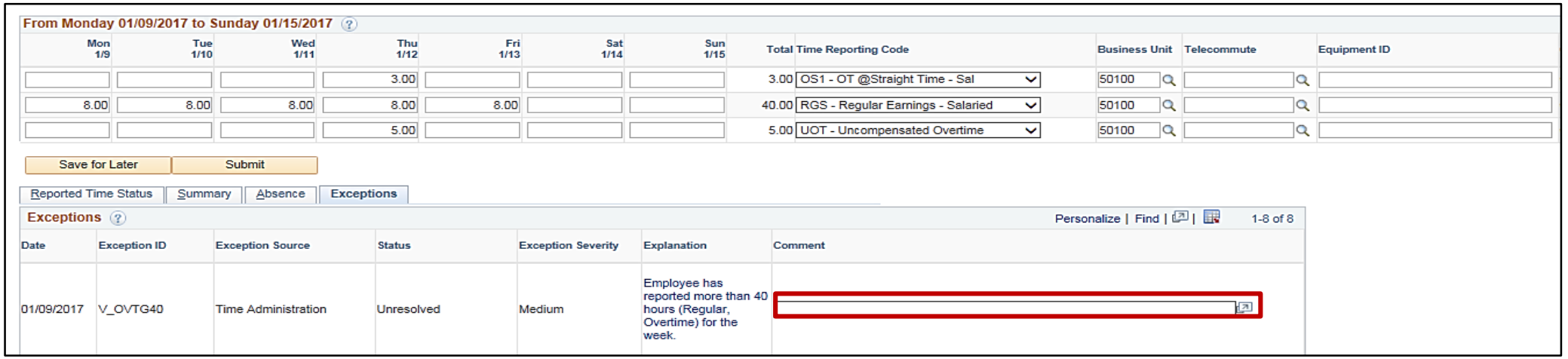
- You realize you made an error and need to adjust reported time.

Exceptions

If there are exceptions, the **Exceptions** tab displays the exception detail. The **Exceptions** page provides additional information about the exception(s), including the **Date**, **Explanation**, and **Severity** level. There is also a **Comment** field to respond to the Approver if there is a reason for the exception. Note you can only update this **Comment** field from the Timesheet and not from **View Payable Time**.

An exception icon will also display on the **Reported Time Status** tab next to time with exceptions. Note that exceptions will be removed if the time is corrected and after it is rerun through Time Administration. That is how users can check to make sure the exception was resolved.

For more detailed information about exceptions (low, medium, and high severity), see the job aid entitled **501 TA: Exceptions** located on the Cardinal website in **Job Aids** under **Training**.



Adjusting Timesheet Entries

As a result of timesheet review, an item(s) may require adjustment such as:

- Correcting an error identified by Time Administration
- Correcting a TRC
- Updating the number of hours charged to a charge distribution
- Changing a charge distribution
- Updating an absence request
- Cancelling an absence request

You can enter timesheet adjustments up to six pay periods in the past and not prior to the beginning of the current fiscal year. If adjustments are needed for an earlier period, contact your administrator.

Adjusting Timesheet Entries (continued)

To adjust the timesheet:

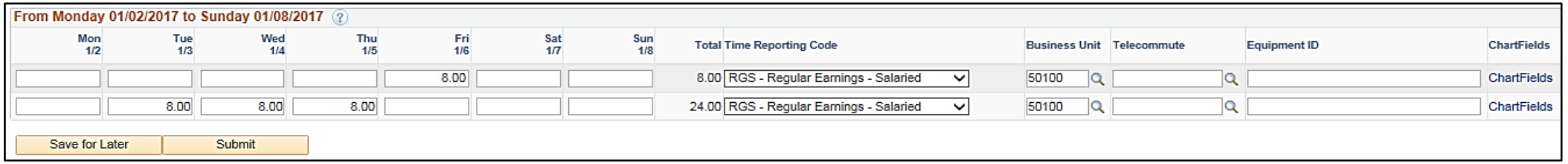
1. Select the week for which the changes are to be made.
2. Go to the appropriate section on the timesheet.
3. Make the necessary update(s).
4. Resubmit the time for Time Administration processing.

Adjusting Timesheet Entries (continued)

If an absence request is added after time has been submitted, go back to the timesheet and adjust the time entered for that day. Cardinal does not automatically make these adjustments. You can also make changes to an existing row if applicable (i.e., change the number of hours, change the ChartField distribution, change the TRC, etc.).

For this example where 8 hours of time entered on Friday should be distributed to another ChartField:

- Eight hours of regular time was entered on Friday charged to standard distribution.
- Delete the eight hours of regular hours from Friday and insert a new row for Friday with 8 hours and submit as appropriate.



Lesson 5: Checkpoint

Now is your opportunity to check your understanding of the course material.

Read the question on the next slide(s), select answer(s) and click **Submit** to see if you chose the correct response.

A high exception prevents payable time from being generated.

- ○ True
- ○ False

PROPERTIES

On passing, 'Finish' button:	Goes to Next Slide
On failing, 'Finish' button:	Goes to Next Slide
Allow user to leave quiz:	After user has completed quiz
User may view slides after quiz:	At any time
Show in menu as:	Single item

Edit in Quizmaker

Edit Properties

Put the steps in order for making a timesheet adjustment by selecting from the drop down list.

-- Select --

-- Select --

-- Select --

-- Select --

-- Select --

PROPERTIES

On passing, 'Finish' button: Goes to Next Slide

On failing, 'Finish' button: Goes to Next Slide

Allow user to leave quiz: After user has completed quiz

User may view slides after quiz: At any time

Show in menu as: Single item

Edit in Quizmaker

Edit Properties

Lesson 5: Summary

5 Timesheet Exceptions and Adjustments

In this lesson, you learned:

- Exceptions can be viewed by opening the Reported Time Status section once time has been submitted and processed by Time Administration.
- Only high severity exceptions prevent payable time from being generated.
- Time Reporting Codes, charge distributions, etc. can be edited on the timesheet.

Course Summary

TA362 Employee Self Service

In this course, you learned:

- Understand key concepts
- Navigate to **Cardinal HCM** and the **Timesheet** page
- Enter regular and overtime hours on the timesheet
- View compensatory leave and overtime leave on the timesheet
- View holiday leave
- View current Absence Entitlement Balances
- Enter Absence Requests
- Adjust Absence Requests
- Understand the reasons for timesheet exceptions
- Make timesheet adjustments

Course Evaluation

Congratulations! You successfully completed the **501 TA362: Employee Self Service** course.

Click here to access the evaluation survey for this course.

Once you have completed and submitted the survey, close the survey window. To close the web based training course, click the [**X**] button in the upper right corner.

Appendix

- Key Terms
- Diagrams and Screenshots
- Flowchart Key

Key Terms: General

Self Service: The ability for employees to enter their own time and absence requests directly in Cardinal.

Self Service User/Time Reporter: An employee who reports time.

Timesheet Page: The page in Cardinal where Self Service users:

- Enter and submit the time they worked
- View compensatory and overtime leave balances
- View absence entitlement balances
- Enter and submit absence requests

Work Schedule: The days and hours an employee is scheduled to work. Cardinal uses work schedules to validate time and calculate absences.

Key Terms: Timesheet Entry

Business Unit: Identifies a state agency. VDOT is 50100.

ChartFields: Identifies how productive and non-productive time is charged.

SpeedType: Provides a shortcut that auto-populates some ChartFields on a transaction. Additional fields (e.g., Account) may need to be entered manually to successfully submit time.

Time Reporting Code (TRC): Classifies hours recorded on the timesheet, e.g., Regular (RGS), Overtime (OT1, EOT, etc.), Compensatory Leave (CPE), etc.

Key Terms: Timesheet Processing

Exception: An error or warning regarding reported/payable time that requires review or attention.

Lockout: A period of time that a user is temporarily prevented from making prior period adjustments on timesheets. This is normally at the close of the pay period when timesheets are due.

Payable Time: Time that has been reported, submitted, and successfully processed through Time Administration. To be successfully processed means that either no exceptions or low/medium exceptions are reported. Payable time is sent to the employee's approver for approval.

Reported Time: Time that has been recorded on a timesheet but not processed by Time Administration.

Reported Time Status: The section on the **Timesheet** page where reported/payable time and exceptions can be viewed.

Submitted Time: Time that has been reported and submitted for Time Administration.

Time Administration: A batch process that validates submitted time against Time Reporting Rules and generates payable time. This process also generates exceptions to Reported time.

Time Reporting Rules: A set of defined business rules that Time Administration uses to validate Reported time. An example of a Time Reporting Rule: Scheduled overtime for salaried nonexempt employees cannot be reported unless 40 productive hours have been worked in the work week.

Key Terms: Absence Management

Absence Entitlement: The hours or days of leave an employee has accrued for an absence type, e.g., Vacation, VSDP Sick, VSDP Personal.

Absence Event: The consecutive period of time an employee is absent for the same reason, e.g., Vacation, VSDP Sick, VSDP Personal, etc.

Absence Name: The name given to a specific type of absence, e.g., Vacation, VSDP Sick, VSDP Personal, etc.

Absence Reason: The additional classification of the absence type for an absence event, e.g., Jury Duty (absence reason) is a possible classification for Civil and Work-Related Leave (absence type).

Absence Take: The absence type and amount of time that an employee takes for an absence event.

Accrual Periods: The time periods by which employees earn leave, e.g., a pay period for Vacation, a leave year for VSDP Personal, etc.

Entitlement Balance: The number of hours of unused entitlement for a particular absence type

Absence Entry Fields

Absence Entry Fields

Absence Entry Fields (continued)

1 **Start Date and End Date**: Enter the beginning and end date of the absence

2 **Absence Name**: Identifies the type of absence, e.g., Vacation, Sick, etc.

3 **Reason**: The reason associated with the absence. This is the typically as the Absence Name.

4 **Duration**: Cardinal calculates the duration in hours based on your work and holiday schedule.

5 **Unit Type**: Cardinal populates this field with hours. It cannot be changed.

6 **Details Link**: This link opens the Absence Event Details page. Use this page to enter specific hours for an absence.

7 **Status**: Cardinal shows the current status of the absence request, e.g., **Saved**, **Submitted**, **Approved** or **Needs Approval.**

8 **Approval Monitor Link**: Click this link to see the workflow path (specifically, the name of the supervisor) who the absence routed to.

9 **Source**: Cardinal identifies the individual who entered the absence request.

Absence Entry Fields (continued)

10 **Cancel**: Click this box to cancel a previously entered absence request.

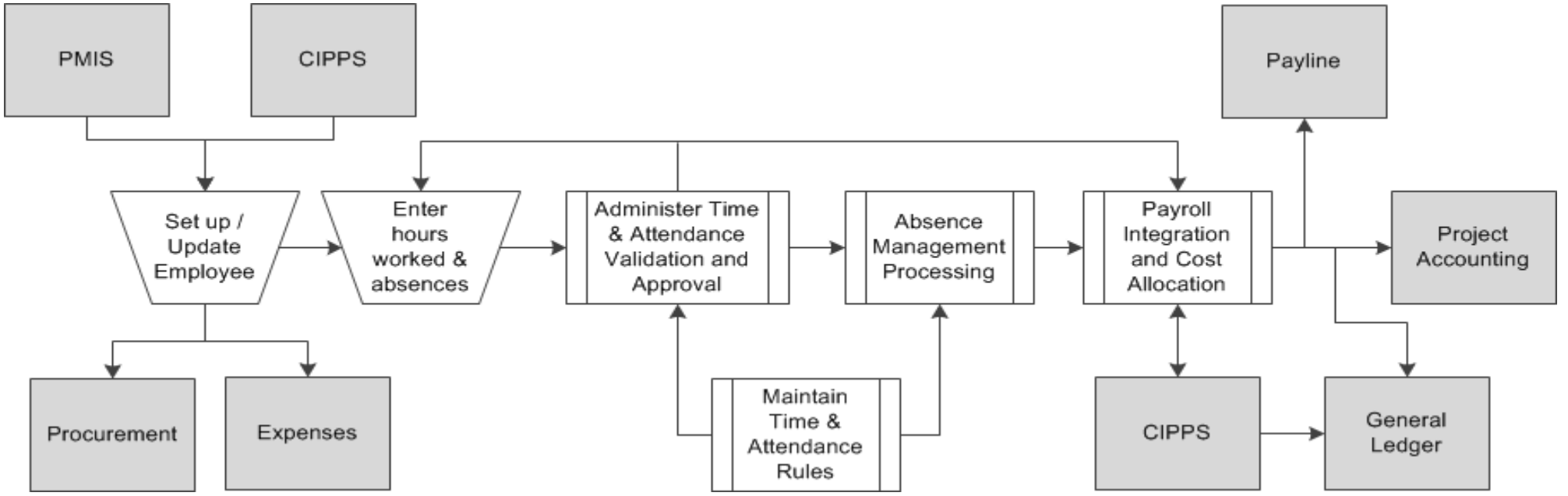
11 **Forecast**: Cardinal calculates your anticipated balances based on all prior absence requests and any schedule increases or accrual rate.

12 **Edit**: Click this button to make a change to an absence request.

13 **Delete**: Click this button to delete the absence request. Note that this button is only available until the absence is either Saved or Submitted

Time and Attendance Process

This diagram provides an overview of the Time and Attendance process.



Time and Attendance Process (continued)

Employee Setup

Employees are set up in Cardinal. This process includes:

- Inputting job, personal, and position data
- Enrolling an employee as a time reporter
- Assigning work schedules
- Enrolling employees in appropriate leave plans and leave benefits

Time and Attendance Capture

Time is captured by employees after being set up as time reporters by:

- Report time
- Request absences
- View and correct timesheet errors
- View and run Time and Attendance reports

Time and Attendance Process (continued)

Administer Time and Attendance Validation and Approval

The Time Administration process validates reported time. It also:

- Generates payable time
- Identifies exceptions
- Processes payable time and sends it to Payroll

Supervisors can:

- Approve or deny time and absence requests
- Complete the timesheet on behalf of the employee

Absence Management Processing

The Absence calculation process validates and processes approved absences. It:

- Adds leave accruals and entitlements to absence balances (entitlement balances)
- Deducts leave taken from absence balances (take balances)
- Processes entitlements and takes using Absence Management rules
- Sends processed absences to payable time at period close

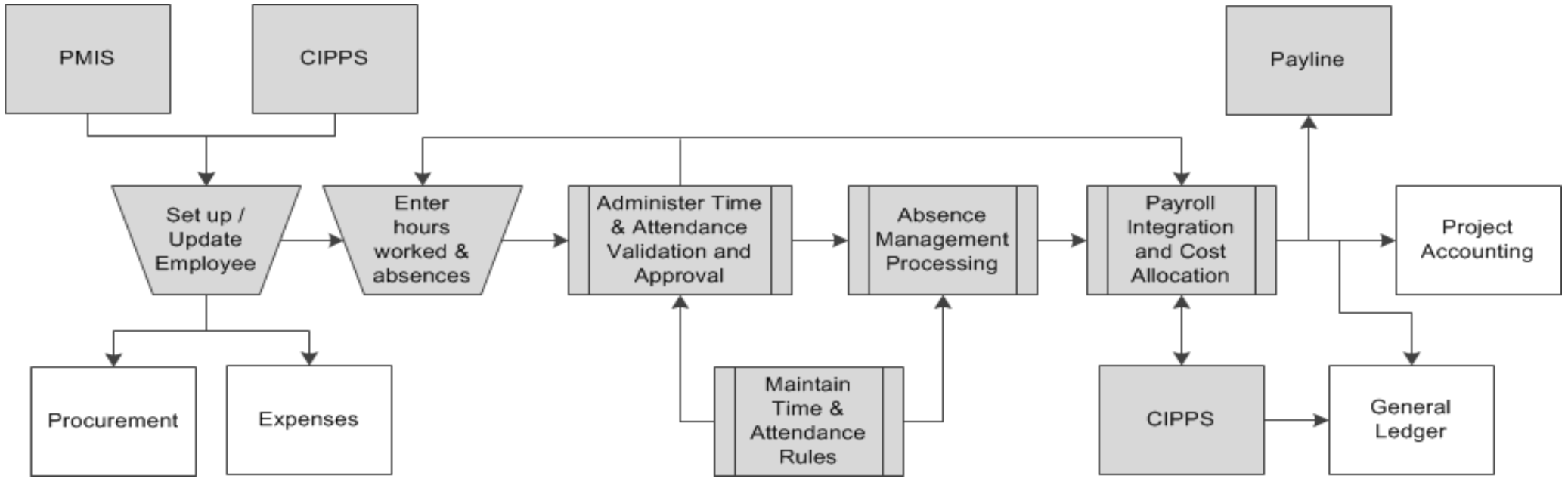
Payroll Integration and Cost Allocation

- Allocates approved payable time to payroll costs according to the timesheet charge distributions

Integration with Time and Attendance

Time and Attendance integrates with four other Cardinal modules, which include:

- Procurement
- Expenses
- Project Accounting
- General Ledger



Integration with Time and Attendance (continued)

Procurement

Employee information that is created during the Time and Attendance Employee Setup process is used by the Small Purchase Charge Card Program in the Procurement module.

Expenses

Employee information that is created during the Time and Attendance Employee Setup process is used by the Expenses module in the Accounts Payable functional area to process employee travel and business expense reimbursements.

Project Accounting

Employee labor costs that are charged to projects are sent to Project Accounting when employee pay is distributed according to the charge distribution entered on employee timesheets.

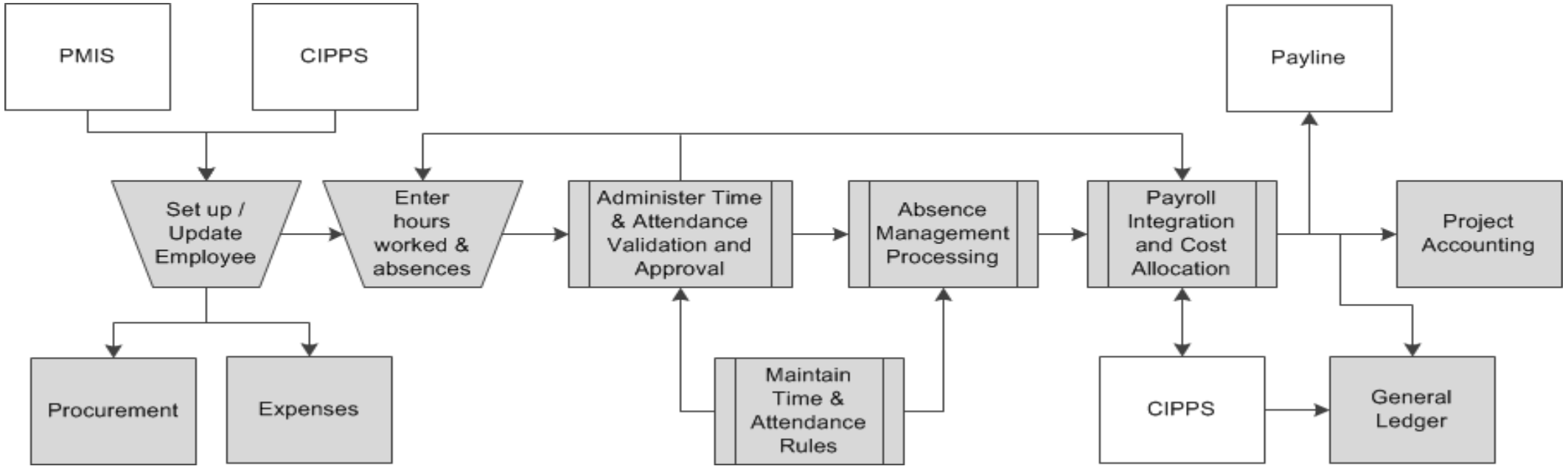
General Ledger

Employee labor charges are sent to the General Ledger functional area when employee pay is distributed according to the charge distribution entered on employee timesheets.

Interfaces with PMIS, CIPPS, and Payline

Time and Attendance also interfaces daily with several external systems:

- Personnel Management Information System (PMIS)
- Commonwealth Integrated Payroll & Personnel System (CIPPS)
- Payline



Interfaces with PMIS, CIPPS, and Payline (continued)

Personnel Management Information System (PMIS)

New and updated employee and position information is first entered into PMIS. PMIS then sends the information to Cardinal.

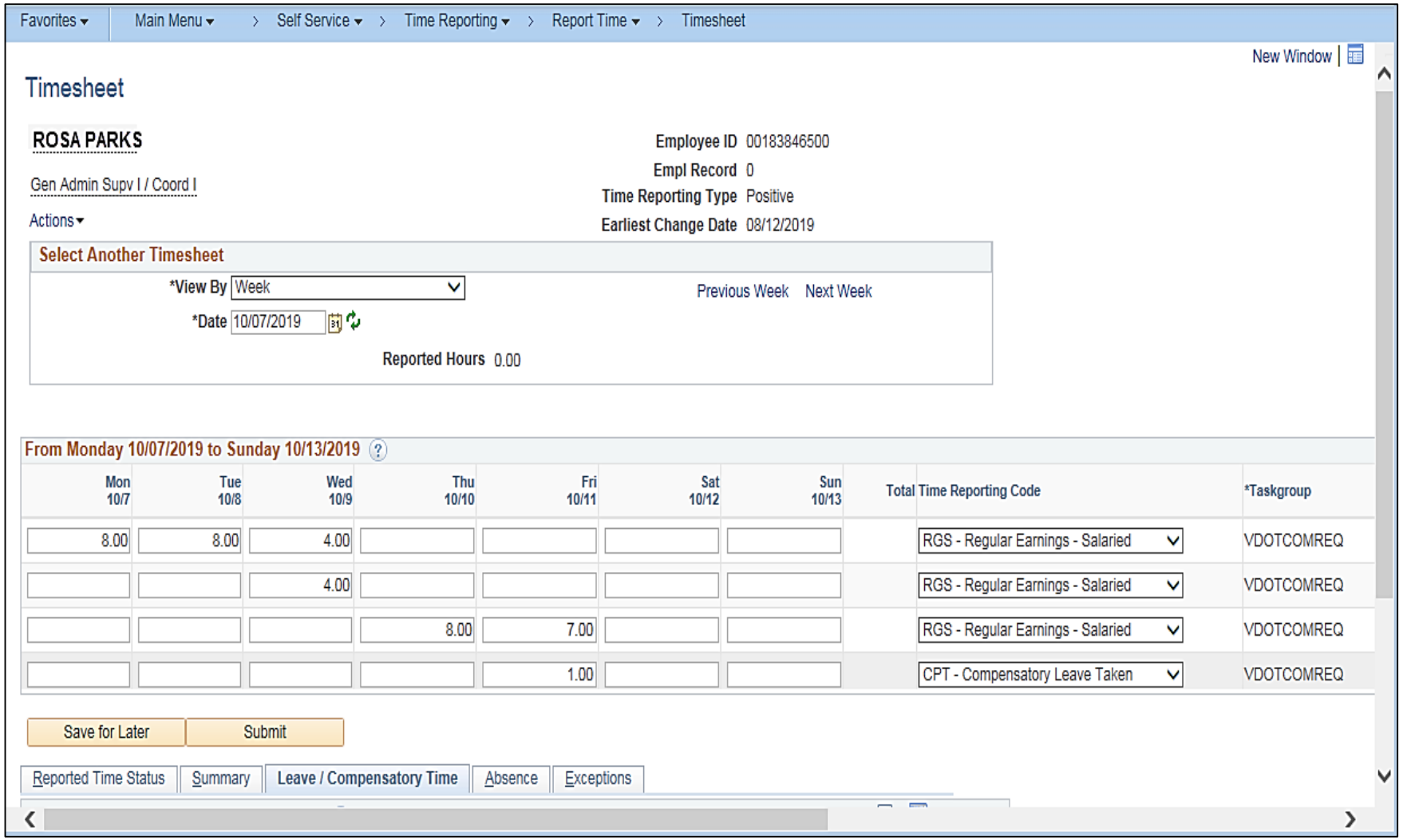
Commonwealth Integrated Payroll & Personnel System (CIPPS)

Timesheet entries for hourly employees and overtime entries for both hourly and salaried employees are sent to CIPPS to create employee pay. Timesheet entries also identify how employee regular and overtime pay is charged.

Payline

Absence information is sent periodically to the Department of Accounts to allow employees to view their absence balances via Payline.

Charging Time to Multiple Distributions (continued)



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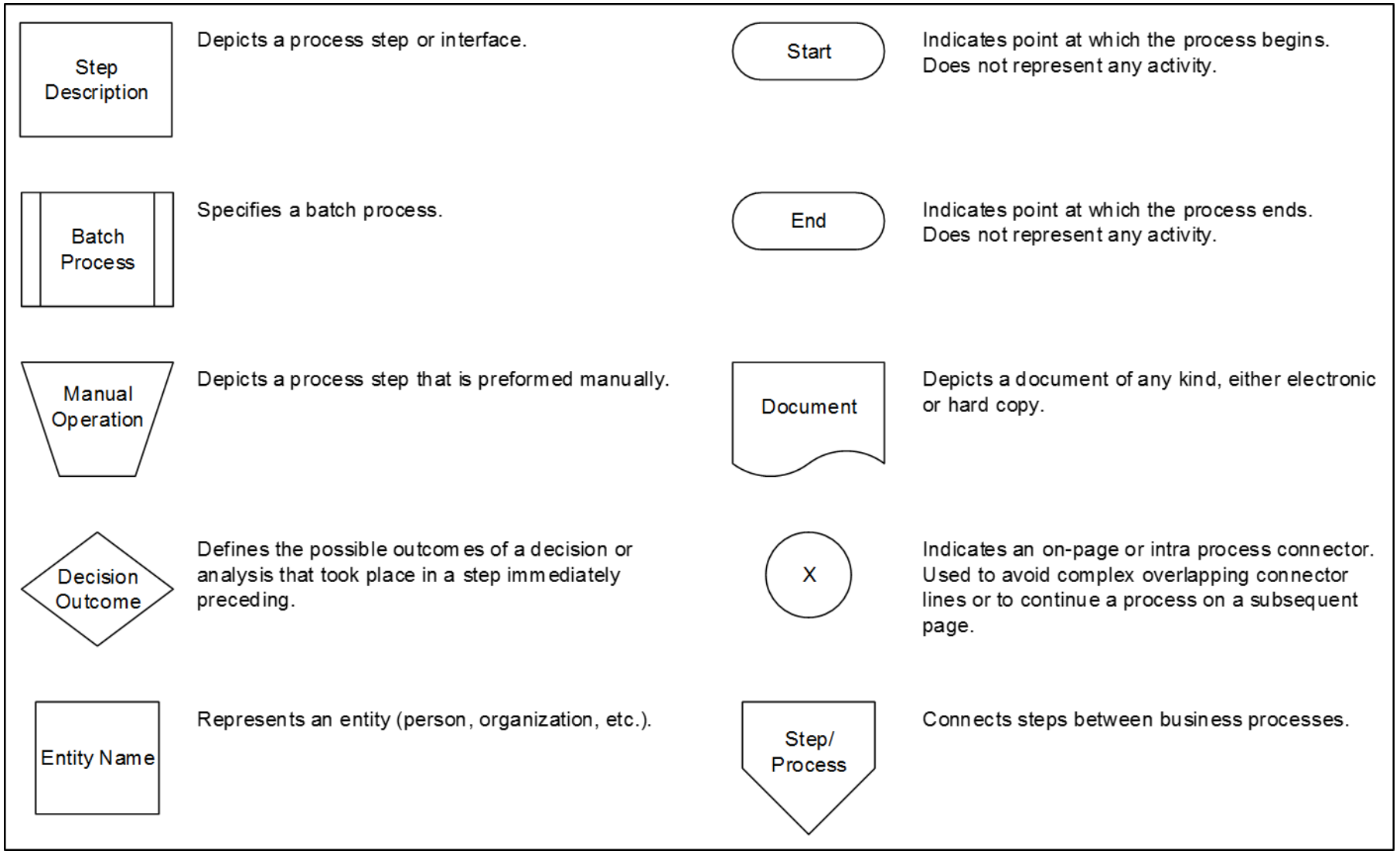
Flowchart Key