501 TA364: Time and Attendance Timekeeper Processing

Instructor Led Training

Rev 11/26/2019

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:

- Understand key concepts related to Time and Attendance
- Enter time worked
- Enter absence requests
- Make timesheet adjustments
- Manage timesheet exceptions

Agenda

1. Understanding Time and Attendance
2. Entering and Viewing Time
3. Entering and Managing Absences
4. Managing Exceptions
5. Performing Timesheet Adjustments
6. Timekeeper Processing Hands-On Practice

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:

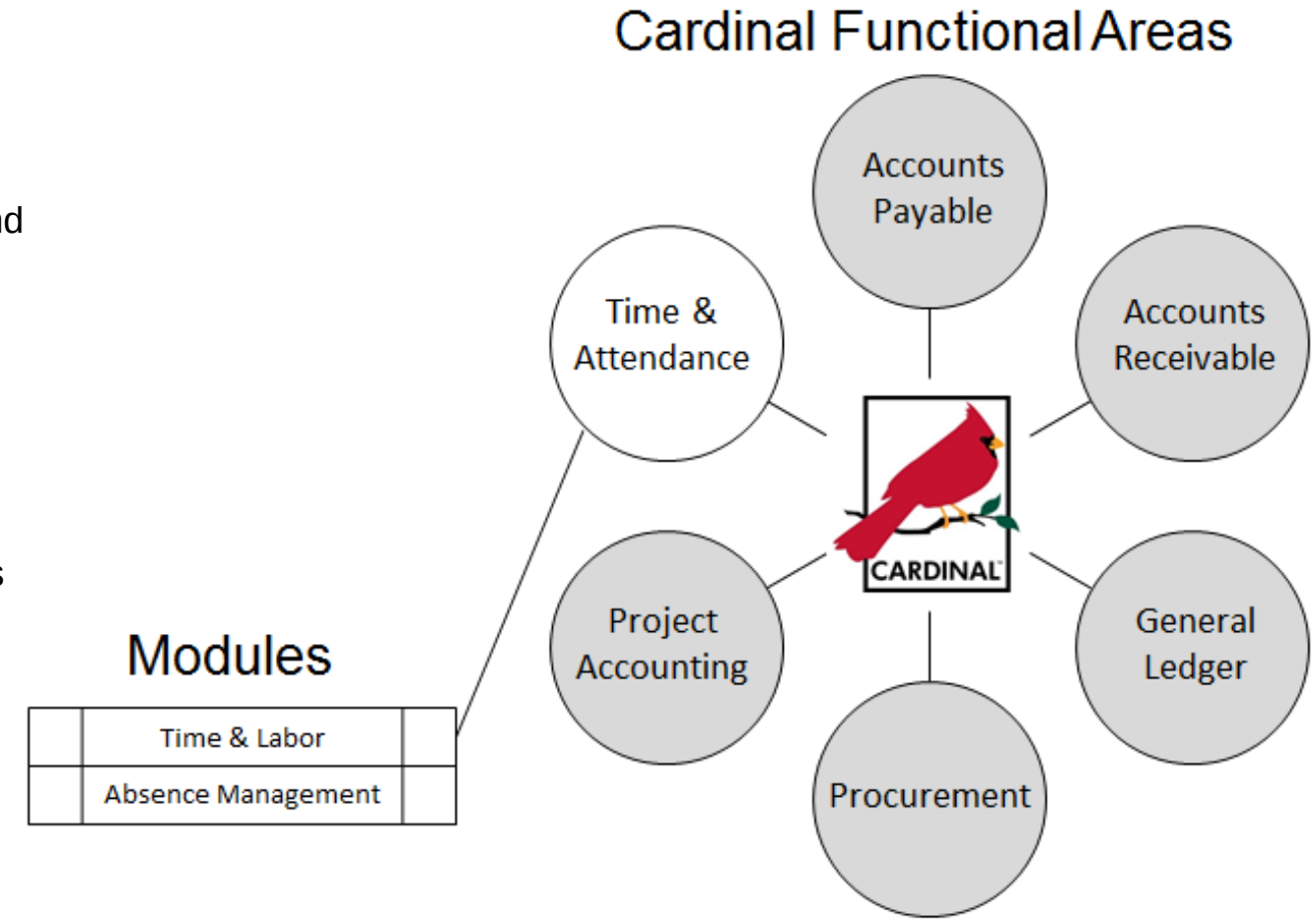
Time and Labor

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 on behalf of employees.



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) hours 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 requires the user to forecast leave balances. Forecasting is a process that determines if there is 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.

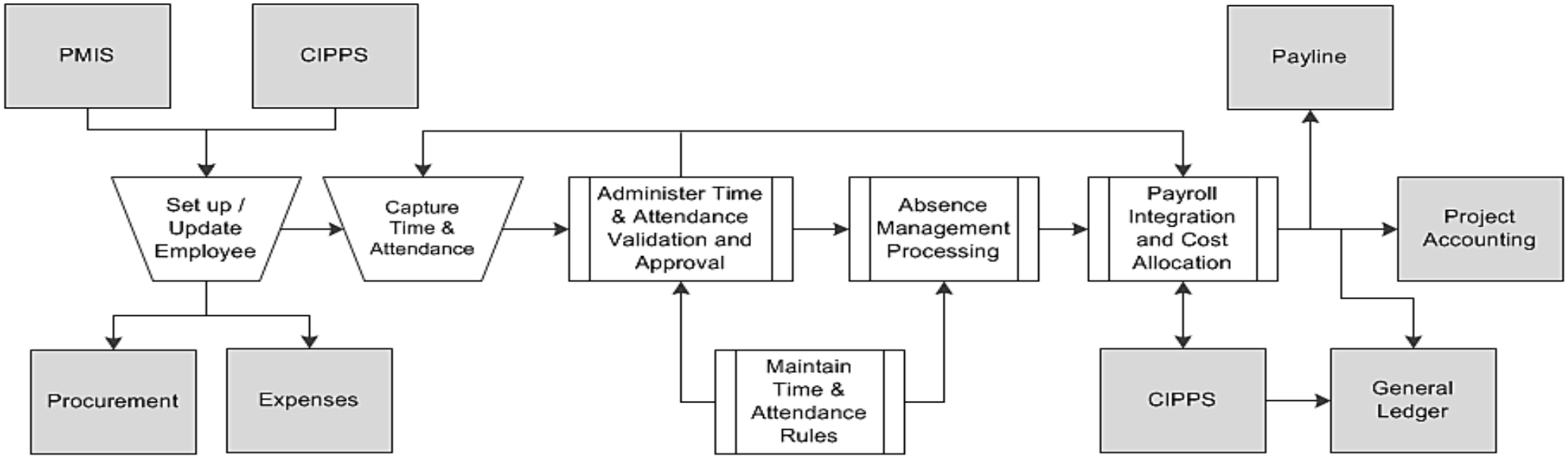
- The Time Administration batch process validates submitted time against time reporting rules. It identifies exceptions (warnings or errors) for submitted time that does not meet defined business rules.

- 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

Time and Attendance includes five sub processes:

- Employee Setup
- Capture Time and Attendance (enter hours worked and absences)
- Administer Time and Attendance Validation and Approval
- Absence Management Processing
- Payroll Integration and Cost Allocation



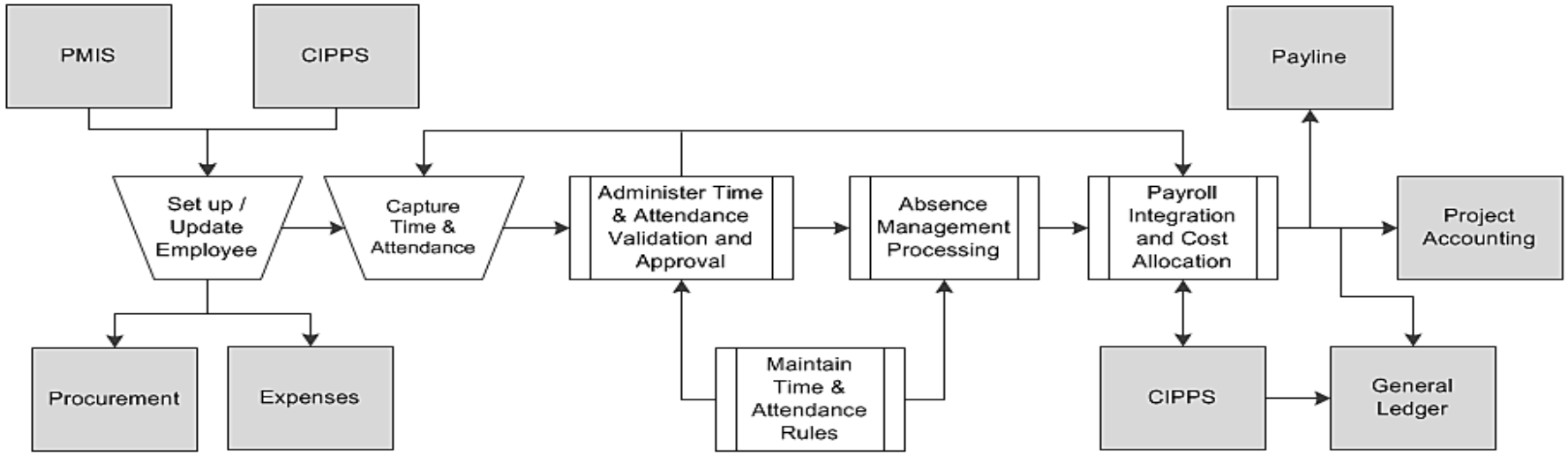
Employee Setup and Time and Attendance Capture

Setup/Maintain Employee

Most position and employee data is loaded into Cardinal from the Personnel Management Information System (PMIS) daily. If the data is incorrect, it must be corrected in PMIS to ensure that Cardinal and PMIS stay in sync (PMIS data overwrites Cardinal data).

Capture Time and Attendance

Employee time is captured on a Timesheet page in Cardinal. All employees with access to Cardinal are self-service users, (i.e. can enter their own time). Timekeepers are able to enter time and absence requests on behalf of other employees (through Manager Self Service) which is then processed and–routed for approval by Cardinal.



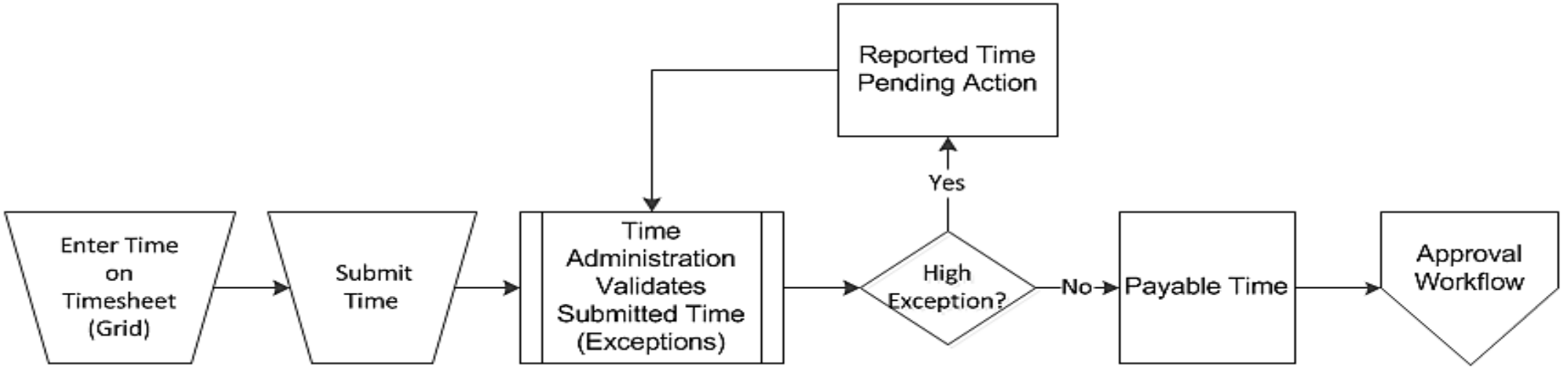
Administer Time and Attendance Validation and Approval

Once you enter and submit time on the timesheet, it is processed by Time Administration.

The Time Administration process:

- Validates submitted time against business rules.
- Identifies and/or corrects exceptions (errors in submitted time).
- Creates payable time and sends it to the supervisor for approval.

Timekeepers can run exception reports and make timesheet corrections to address certain types of exceptions that are identified during this process.



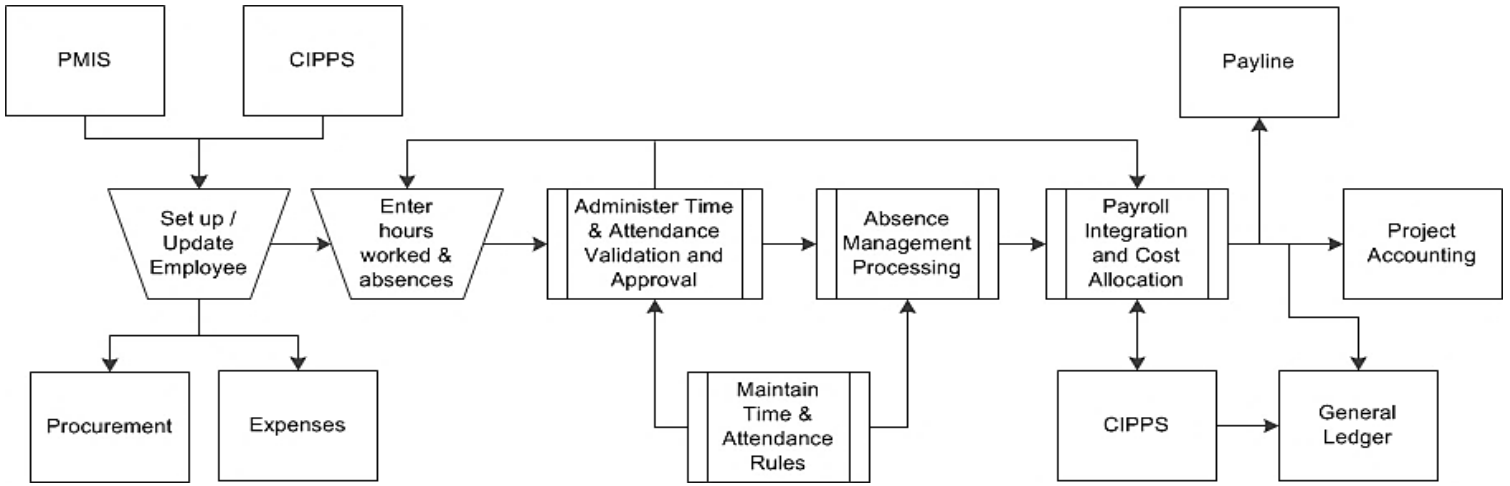
Absence Management Processing

As a Timekeeper, you can:

- Enter and update absence requests.
- View absence entitlement balances.

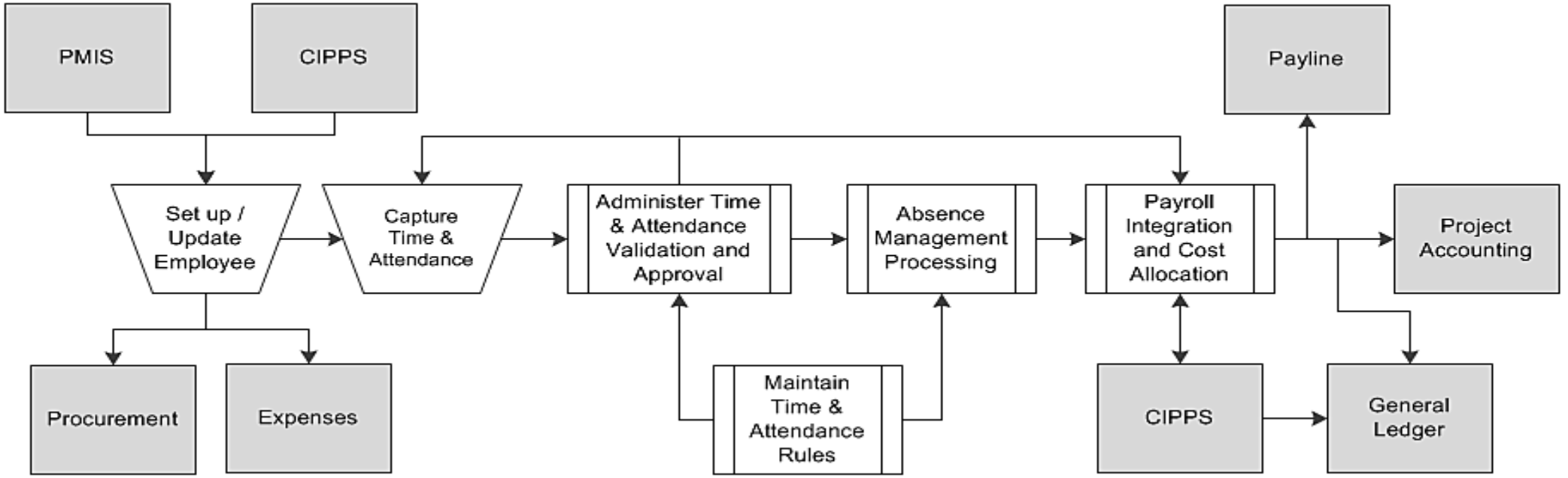
Absence requests, that are entered and submitted on the Timesheet page, route immediately to the employee's supervisor for approval.

Note: Some absences require higher levels of review and approval (i.e. FMLA, Short/Long Term Disability and Workers Compensation).



Payroll Integration and Cost Allocation

Once employee time is reported, processed, and approved, the timesheet information is used to distribute or allocate the payroll costs. Those costs are shared with other Cardinal modules and interfaced to external systems.



Time and Attendance Integration

Time and Attendance integrates with other Cardinal modules:

- **Procurement -** Employee information created during the Employee Setup process is used by the Small Purchase Charge Card Program in the Procurement module.

- **Expenses -** Employee information created during the Employee Setup process is used by the Expenses module to process employee travel and business expense reimbursements.

- **Project Accounting -** Employee labor costs that are charged to projects are sent to Project Accounting according to the charge distribution entered on employee timesheets.

- **General Ledger -** Employee labor charges are sent to General Ledger when employee pay is distributed or allocated according to the charge distribution entered on employee timesheets.

Time and Attendance Interfaces

Time and Attendance also interfaces with several external systems:

- **Personnel Management Information System (PMIS**) **-** When a new position is created or changed, position information is first entered into PMIS. PMIS then sends the information to Cardinal to establish Position Data in Cardinal Time and Attendance. When employees are added or updated, their personnel data is first entered into PMIS. PMIS then sends the employee information (employee name, address, role, hourly, salaried, etc.) to Cardinal Time and Attendance to create an employee profile.

- **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 for these TRCs. After the payroll process is complete, CIPPS provides earnings information to Cardinal. This information is then used by Cardinal, along with employee timesheet charge distribution information, to allocate labor costs.

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

Lesson 1: Summary

1 Understanding Time and Attendance

In this lesson, you learned:

- Key Concepts
- Time and Attendance Process

Lesson 2: Introduction

2 Entering and Viewing Time

This lesson covers the following topics:

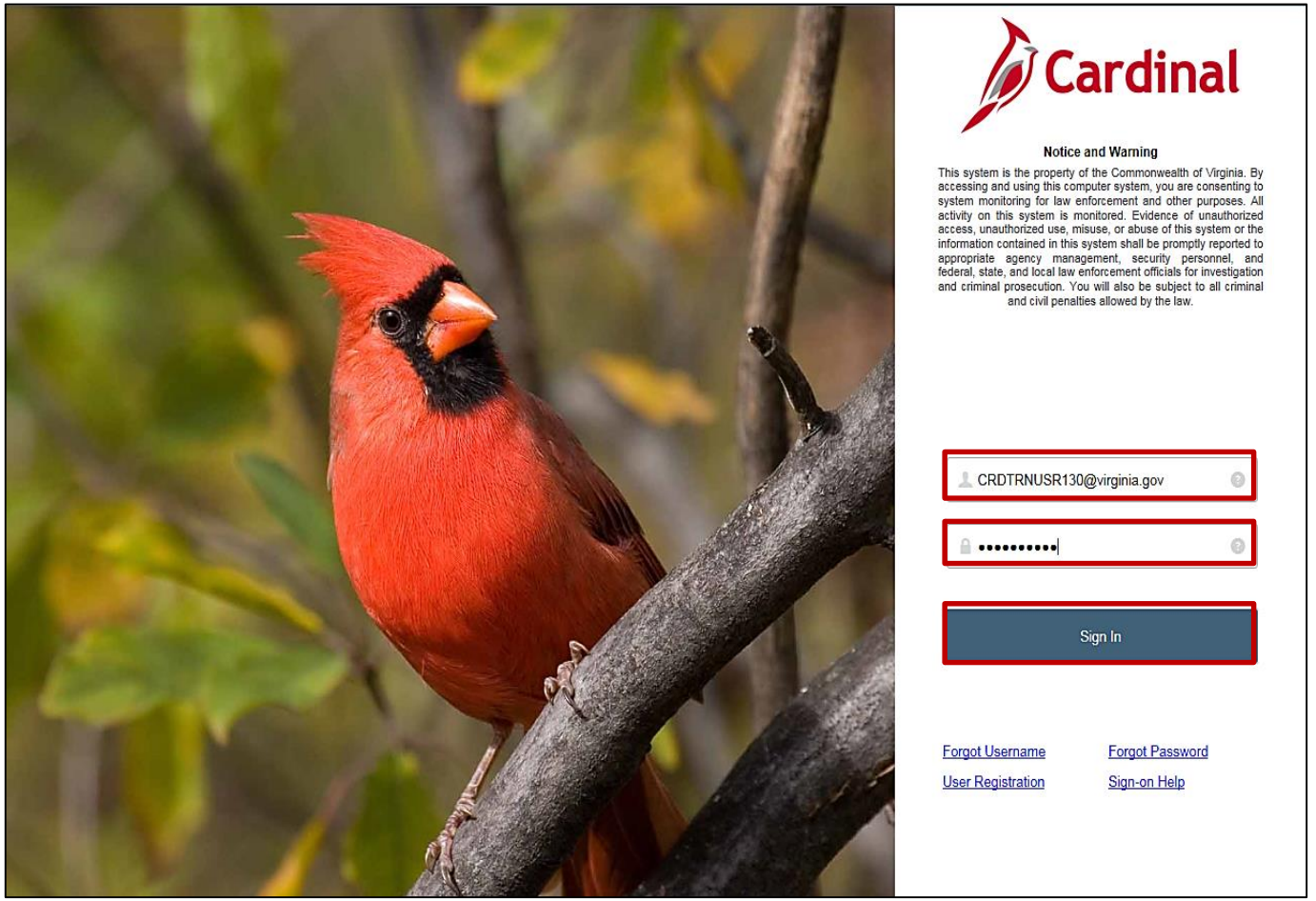
- Accessing the Timesheet Summary Page
- Using Employee Selection Criteria to retrieve employee Timesheets
- Understanding the Timesheet
- Entering time by selecting the correct Time Reporting Codes
- Submitting Time on the Employee Timesheet
- Timesheet Lockout

Navigating in Time and Attendance

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

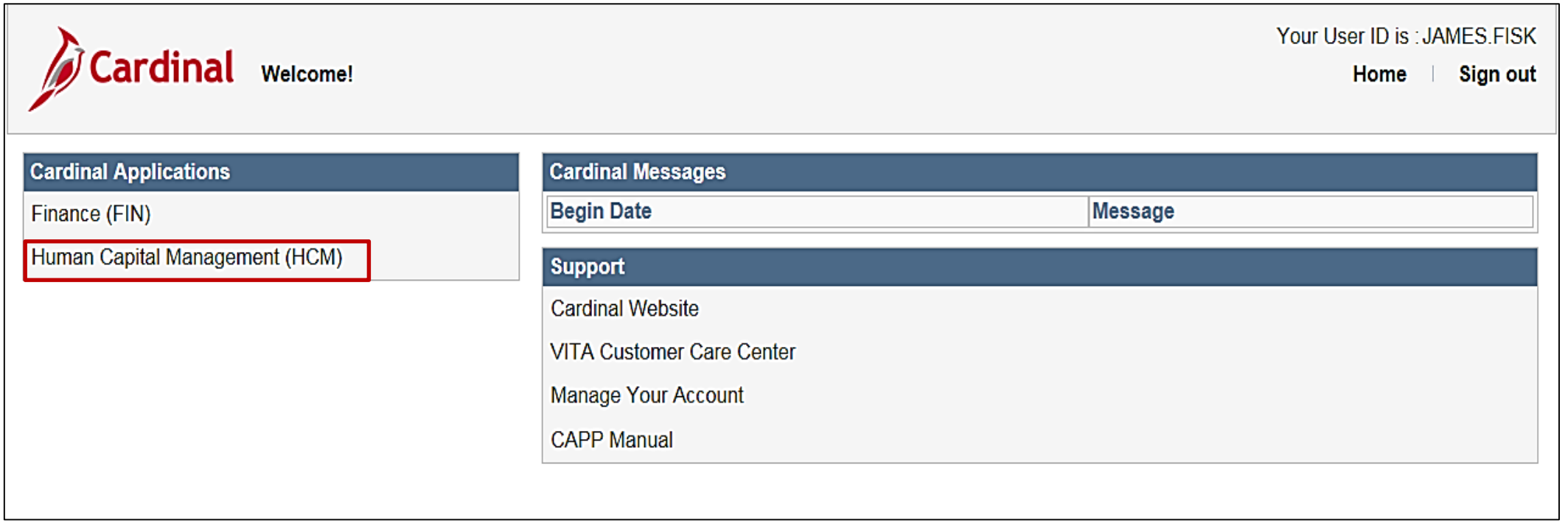
The Cardinal Login page displays:

- 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

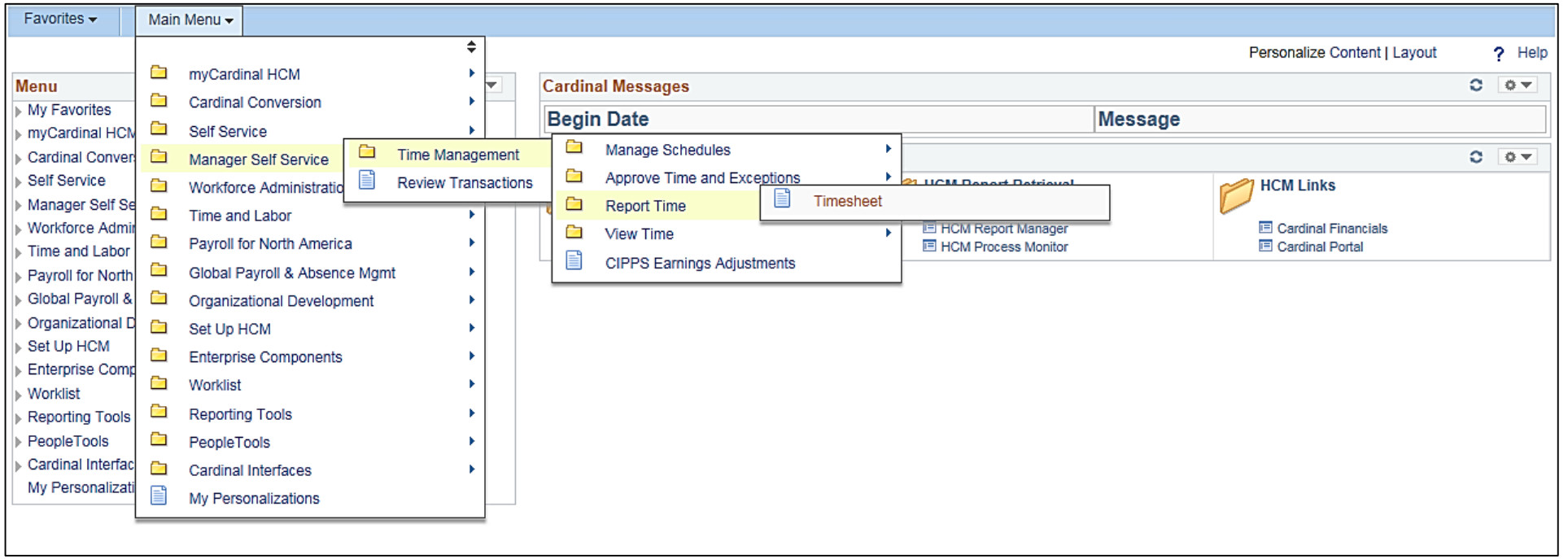


Timesheet Summary

The Timekeeper can access the Employee's Timesheet to enter time and absence requests on behalf of employees (e.g., regular hours worked, overtime/compensatory time earned and taken, sick, vacation, leave without pay, etc.) from the **Timesheet Summary** page.

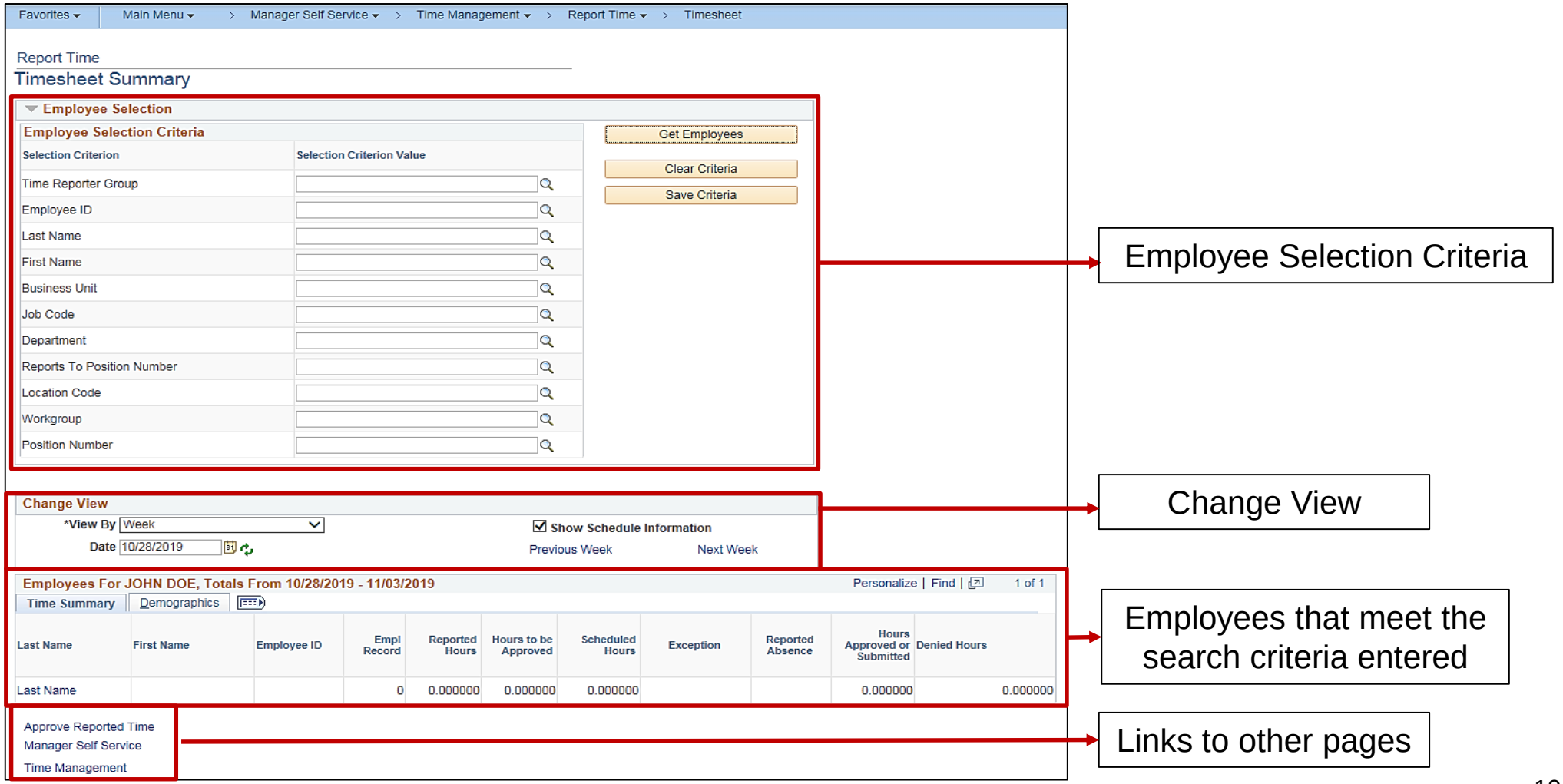
Use the following path to navigate to the **Timesheet Summary** page:

Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Report Time > Timesheet



Timesheet Summary: Employee Selection Criteria

The **Timesheet Summary** page displays. Use the **Timesheet Summary** page to select the employee(s). It has 4 sections as outlined below.



Timesheet Summary: Employee Selection Criteria (continued)

All various fields in the **Employee Selection Criteria** section are usable:

- Time Reporter Group - This selection criteria has three options for VDOT which are:
  - **VDOTALL** – All active VDOT employee
  - **VDOTHRL** – All active VDOT hourly employee
  - **VDOTSAL** – All active VDOT salaried employees

- **Empl ID** - The unique eleven digit HR ID number that identifies an employee

- **Last Name** - Employee last name

- **First Name** - Employee first name

- **Business Unit** - Number assigned to each Commonwealth agency. The Business Unit ID for VDOT is 50100.

- **Job Code** - Code associated with the job role

- **Department -** The unique ID assigned to individual departments within the agency

Timesheet Summary: Employee Selection Criteria (continued)

- **Reports To Position Number -** Selects employees who report to the person currently in a position

- **Location Code** - Field that defines the employee's District/Central Office

- **Workgroup** - A means of classifying employees based on the TRCs entered on their timesheet:
  - **VAPEXCEPT -** VDOT Executives – No Approval
  - **VAPEXTPB4 -** VDOT EXTPB4 – No Approval
  - **VAPEXTPB5 -** VDOT EXTPB5 – No Approval
  - **VDOTEMHRLY -** VDOT Emergency Hourly
  - **VDOT EXCEPT -** VDOT Executive only
  - **VDOTEXTPB4 -** Salaried Exempt Pay Band 4
  - **VDOTEXTPB5 -** Salaried Exempt Pay Band 5 & above
  - **VDOTHRLY -** VDOT Hourly Employees
  - **VDOTNOEXOT -** VDOT Salaried Non Exempt OT Leave
  - **VDOTNONEXM -** VDOT Salaried Non Exempt

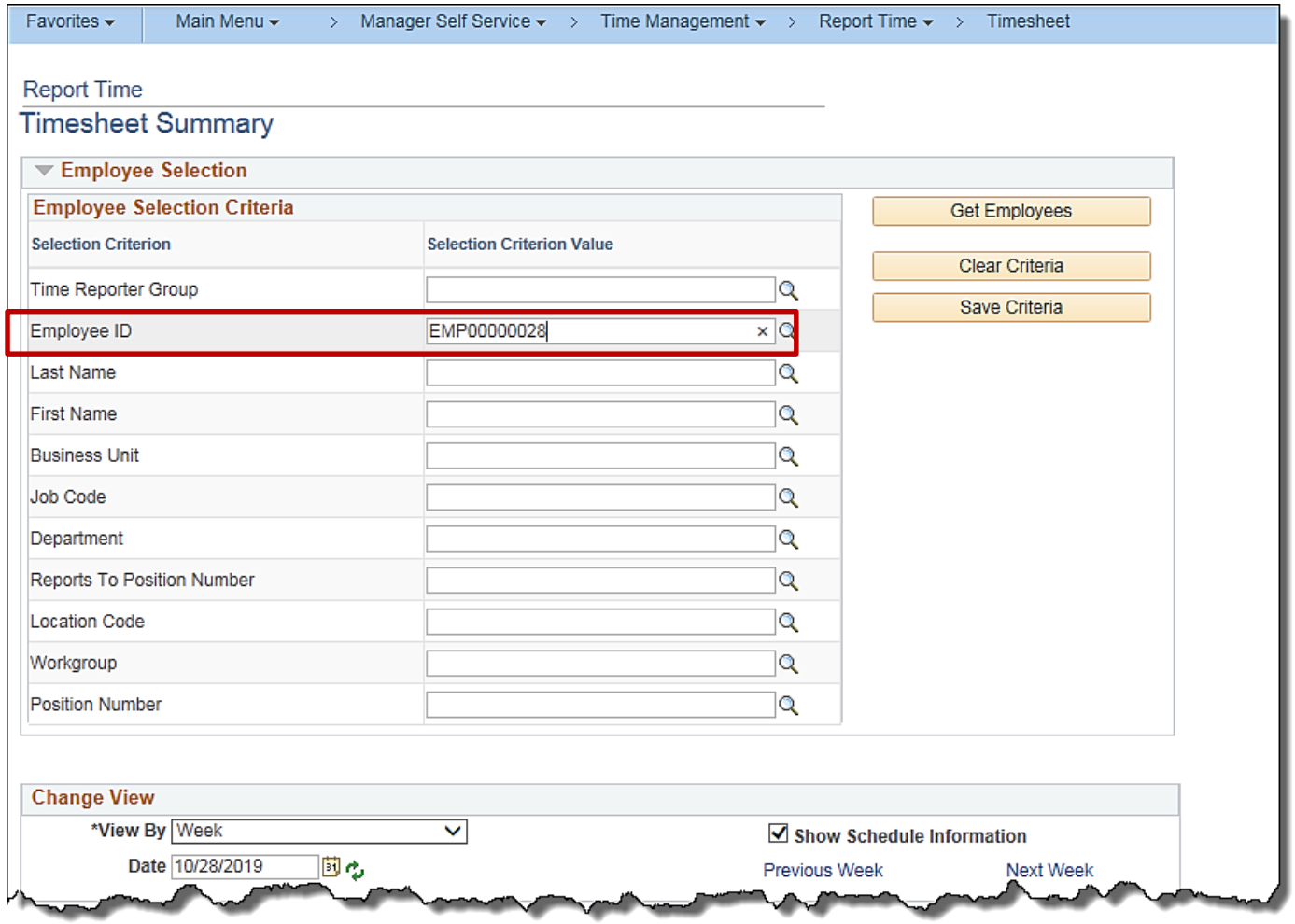
- **Position Number** - Unique number that identifies a position

Timesheet Summary: Employee Selection Criteria

The top portion of the page allows entry of individual **Employee Selection Criteria.**

For example, enter the employee ID in the **Employee ID** field.

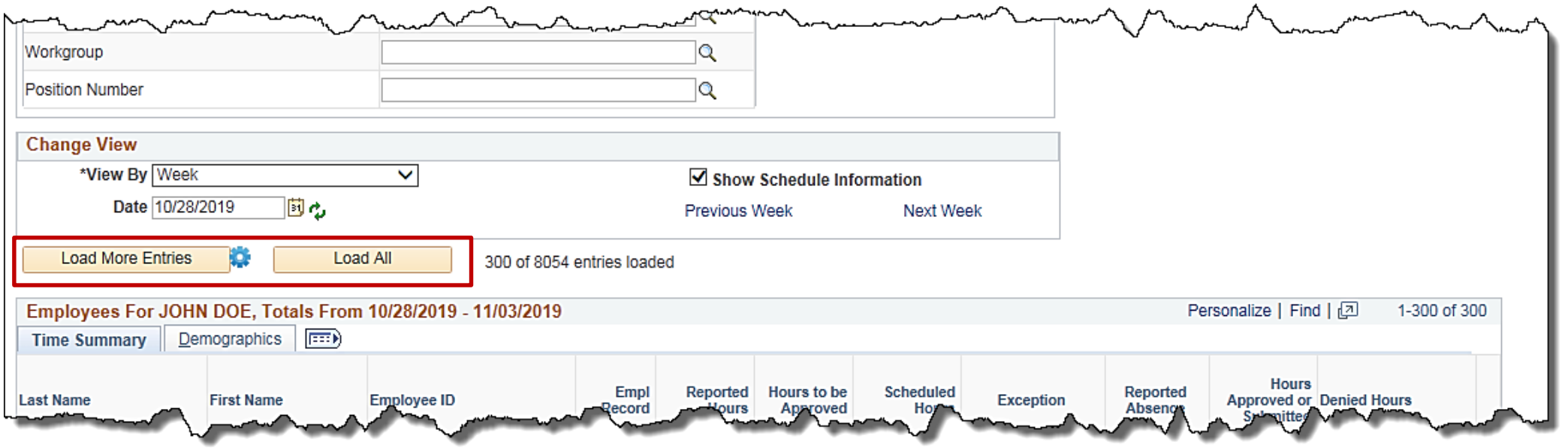
A group of employees can be retrieved by using **Department** or **Reports to Position Number**.



Timesheet Summary Page: Employee Selection Criteria (continued)

It is highly recommended that the **Employee Selection Criteria** fields are used to narrow the selection results. By not using enough criteria, results greater than 300 rows maybe retrieved, which is not a typical grouping.

The **Load More Entries** and **Load All** fields are invoked when there are greater than 300 rows.



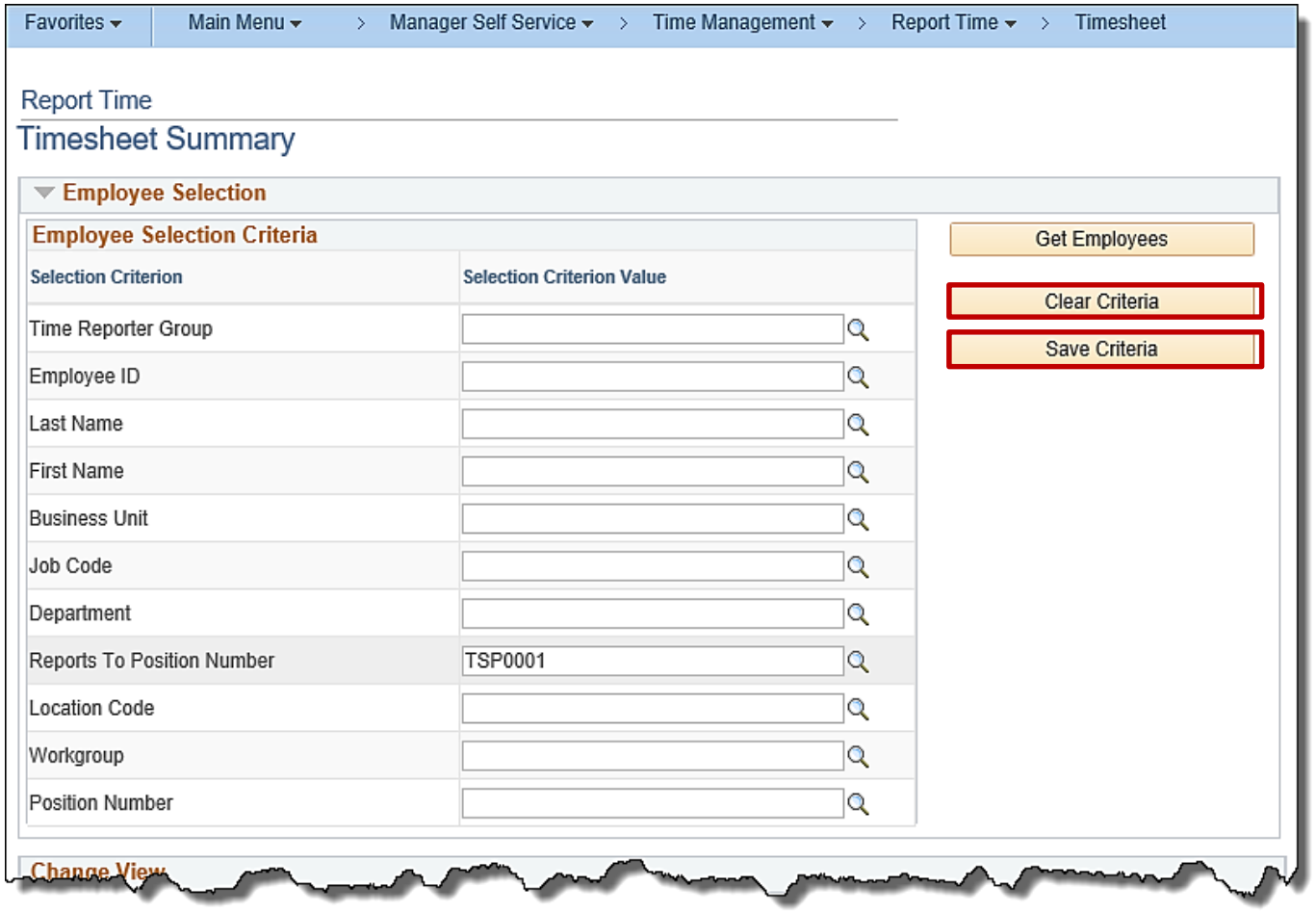
Timesheet Summary: Saving Employee Selection Criteria

Enter the **Employee Selection Criteria** that best matches the population for which time is entered and approved.

To Save Criteria

- Enter the criteria, e.g., Department, Reports To Position Number, or Workgroup.
- Click the **Save Criteria** button.

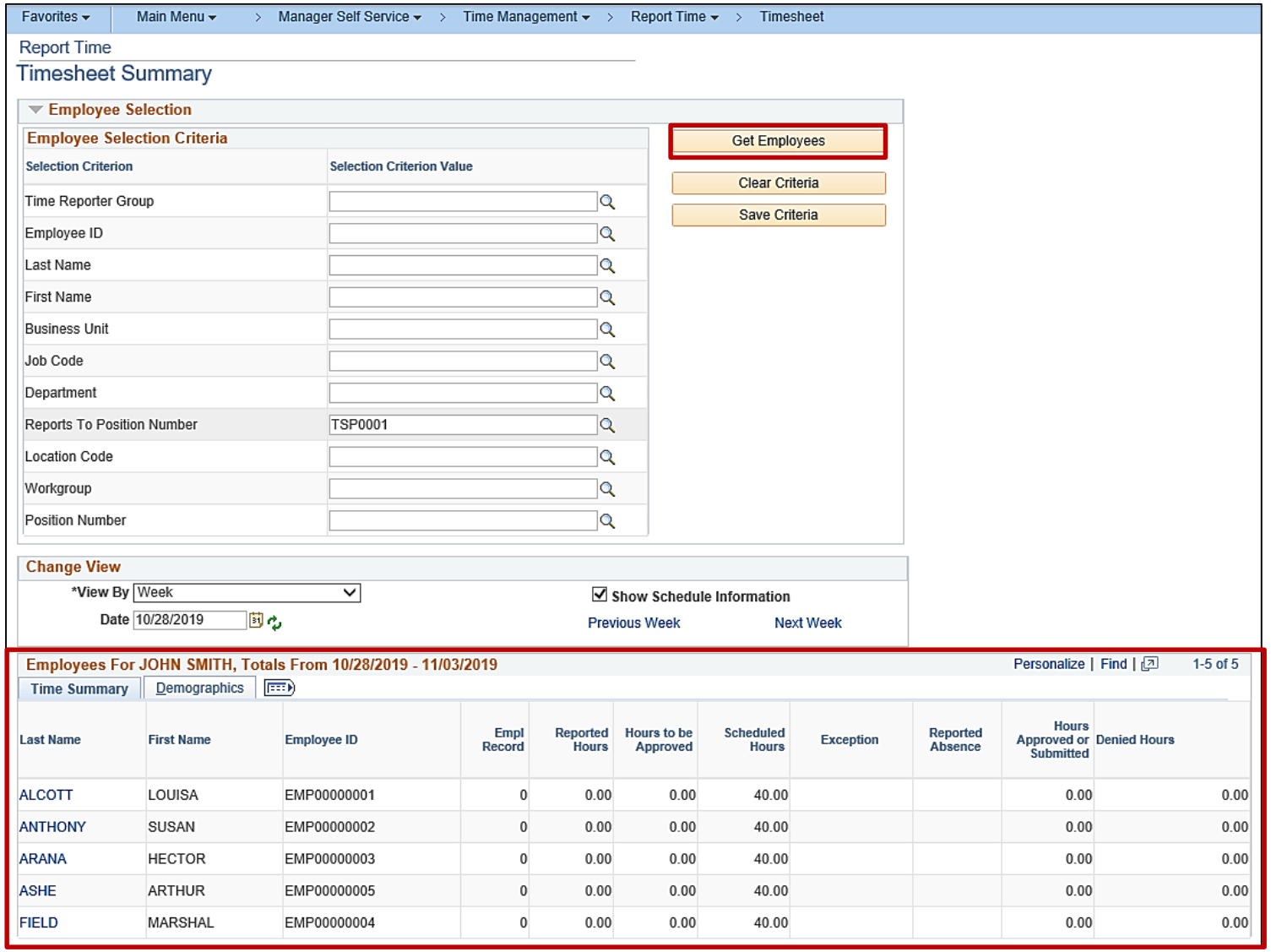
To remove criteria that has been entered, click the **Clear Criteria** button.



Timesheet Summary: Get Employee Timesheets

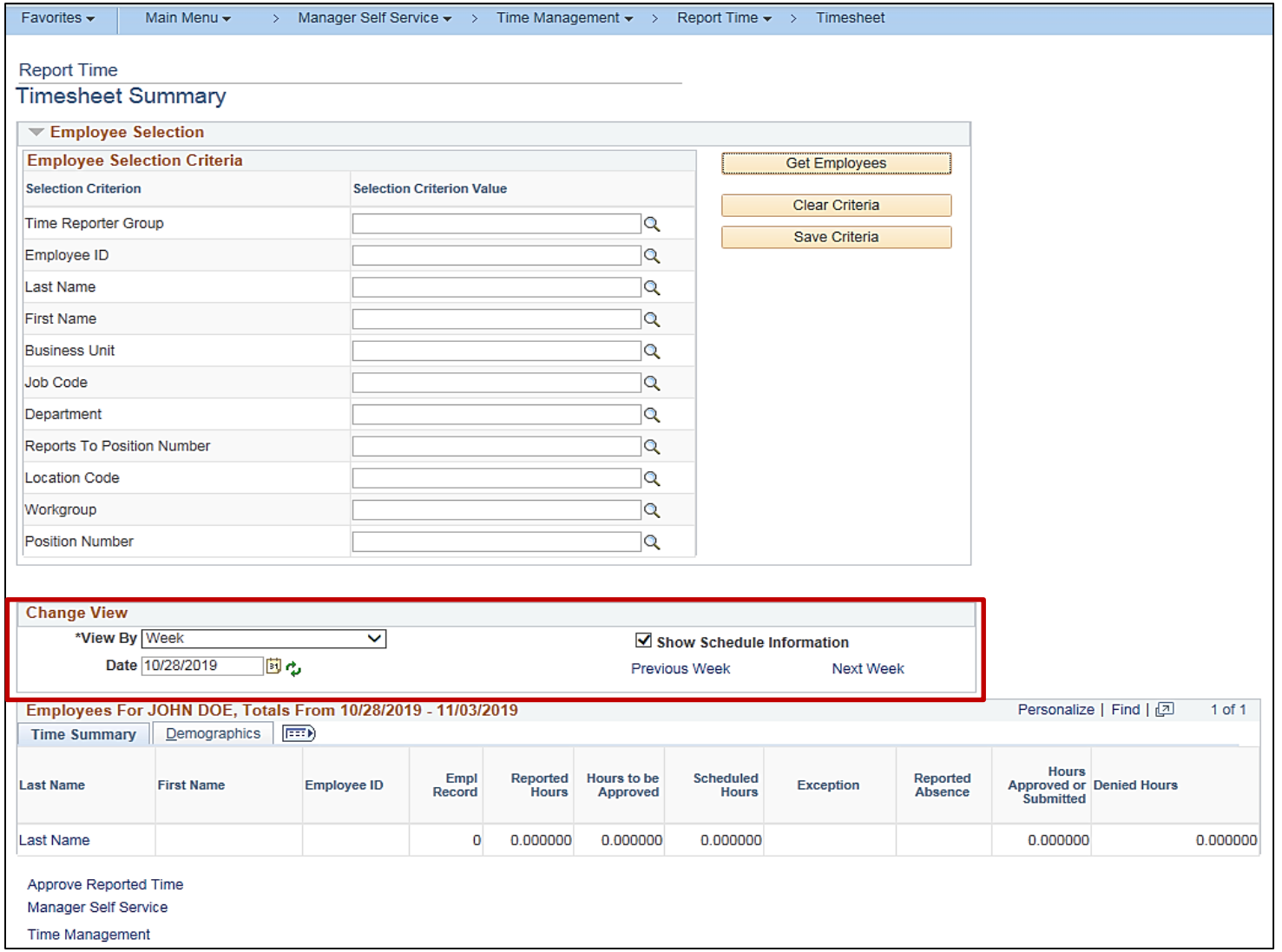
Once you have entered the selection criteria, click the **Get Employees** button.

The system returns employees based on the selection criteria entered under the **Employees For (Manager Name), Total from (Date(s) selected)**



Timesheet Summary: Change View

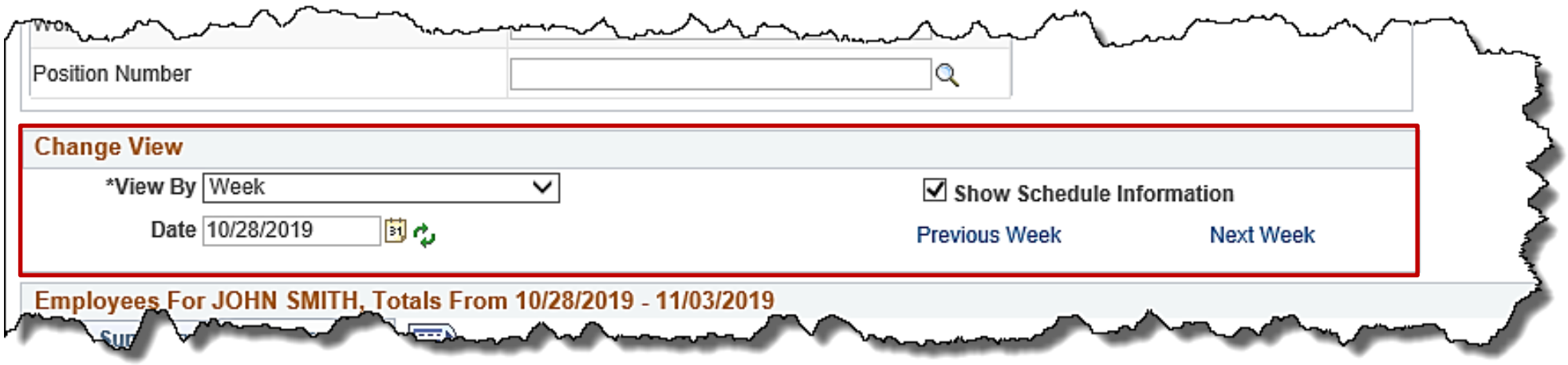
The **Change View** section of the **Timesheet Summary** page controls how the timesheet pages elected display.



Timesheet Summary Page: Change View (continued)

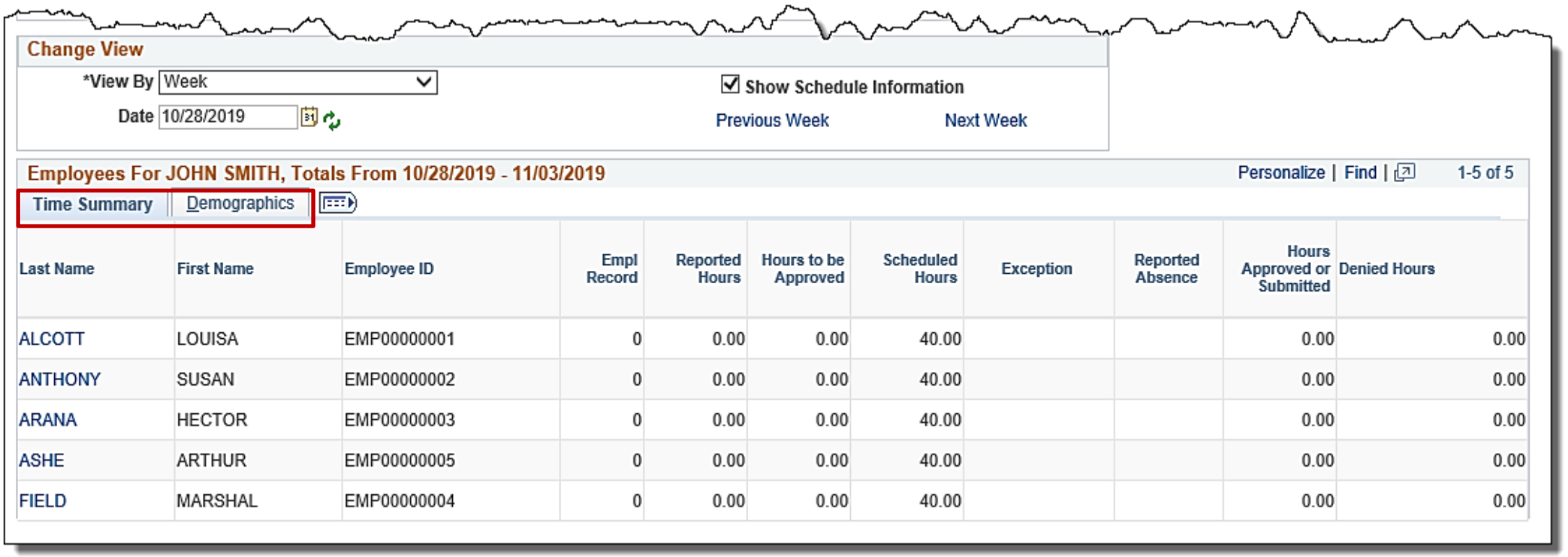
The **Change View** includes:

- **View By** - Shows results for an individual **Day** or for an entire **Week**. The default value for this field is **Week**.
- **Show Schedule Information** - Displays the employee's scheduled days and hours when the indicator is checked.
- **Date -** Driven by the selection made in the **View By** field. If you choose **Day**, then the date should be the day to be viewed. If **Week** is chosen, then the date can be any date in that week. The default value for this field is the current date.



Timesheet Summary Page: Time Summary

There are two tabs that display in the Search results section, **Time Summary** and **Demographics.**

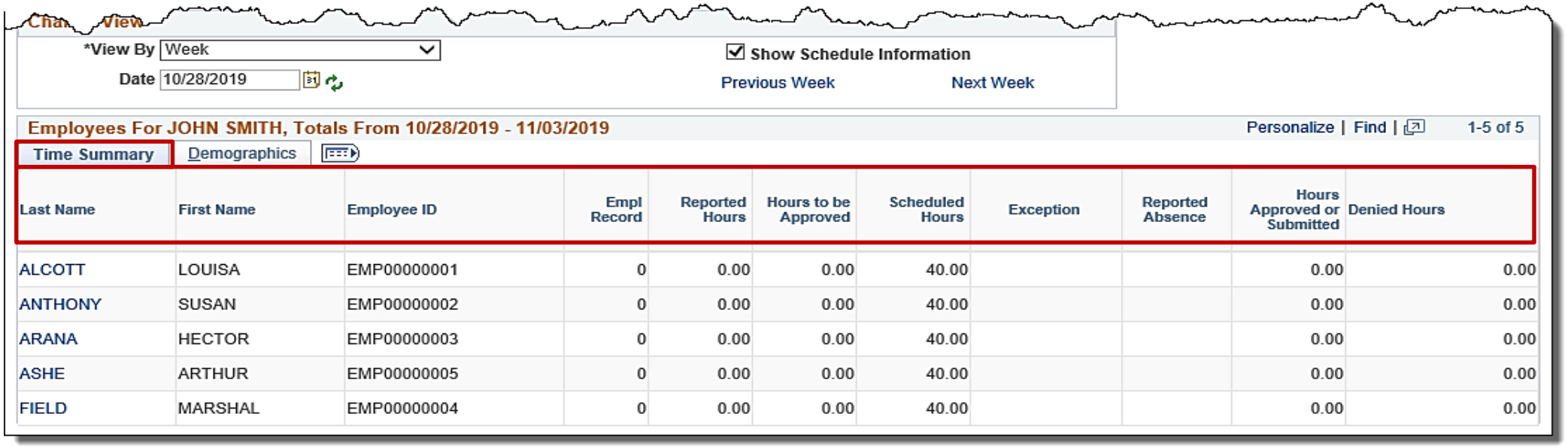


Last Name	First Name	Employee ID	Empl Record	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
ALCOTT	LOUISA	EMP00000001	0	0.00	0.00	40.00			0.00	0.00
ANTHONY	SUSAN	EMP00000002	0	0.00	0.00	40.00			0.00	0.00
ARANA	HECTOR	EMP00000003	0	0.00	0.00	40.00			0.00	0.00
ASHE	ARTHUR	EMP00000005	0	0.00	0.00	40.00			0.00	0.00
FIELD	MARSHAL	EMP00000004	0	0.00	0.00	40.00			0.00	0.00

Timesheet Summary Page: Time Summary (continued)

The **Time Summary** tab provides the following information for each employee:

- **Last Name**
- **First Name**
- **Employee ID**
- **Reported Hours**
- **Hours to Be Approved**
- **Scheduled Hours**
- **Exception**
- **Reported Absence**
- **Hours Approved or Submitted**
- **Denied Hours**

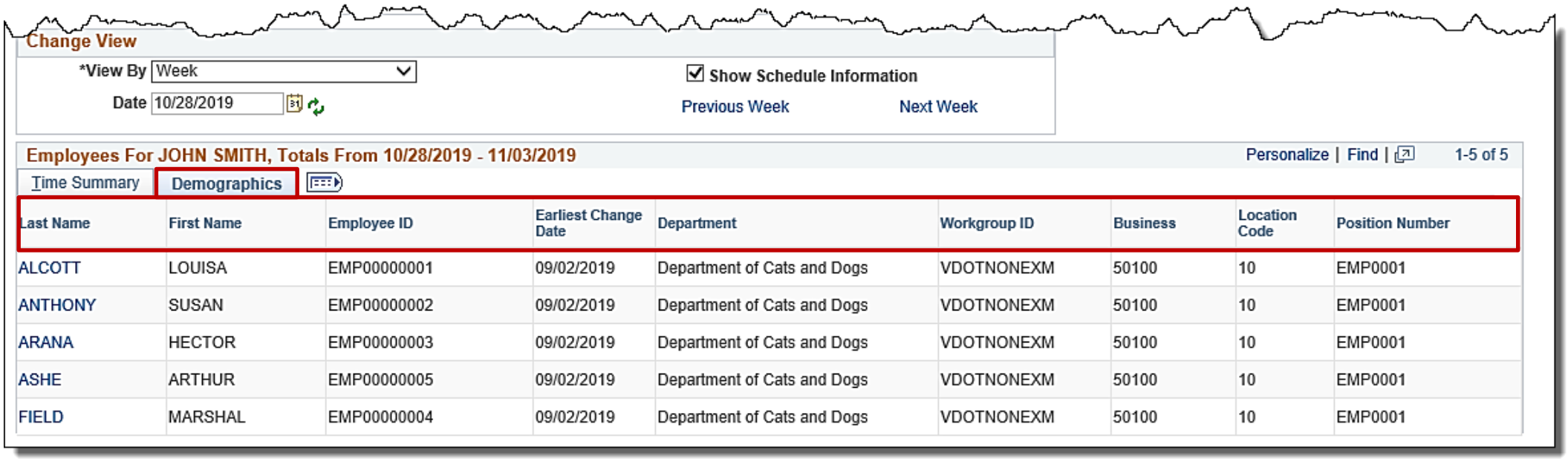


Last Name	First Name	Employee ID	Empl Record	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
ALCOTT	LOUISA	EMP00000001	0	0.00	0.00	40.00			0.00	0.00
ANTHONY	SUSAN	EMP00000002	0	0.00	0.00	40.00			0.00	0.00
ARANA	HECTOR	EMP00000003	0	0.00	0.00	40.00			0.00	0.00
ASHE	ARTHUR	EMP00000005	0	0.00	0.00	40.00			0.00	0.00
FIELD	MARSHAL	EMP00000004	0	0.00	0.00	40.00			0.00	0.00

Timesheet Summary Page: Demographics

The **Demographics** tab provides the following information for each employee:

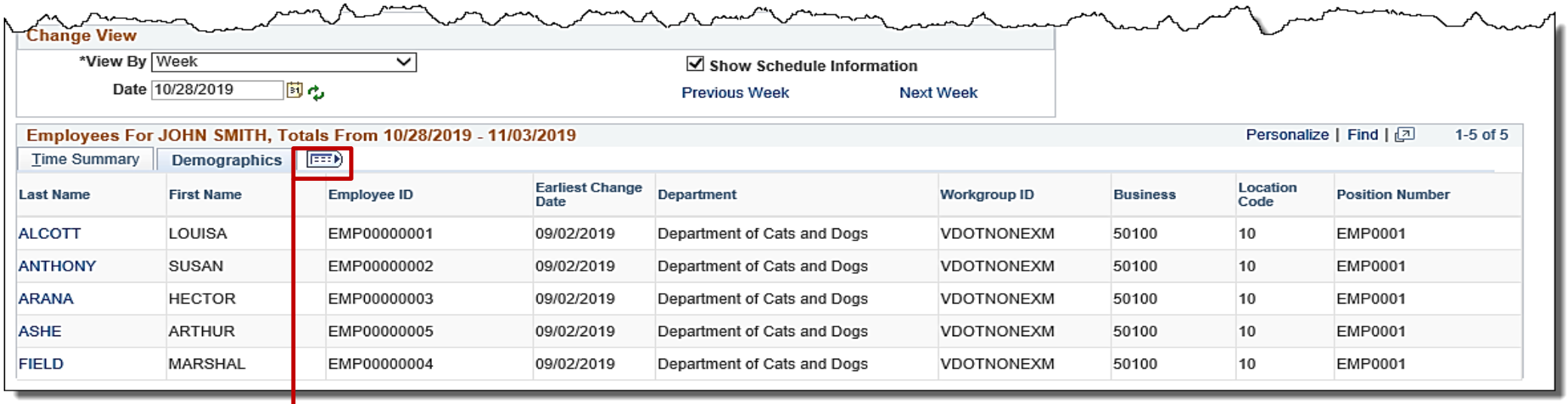
- **Last Name**
- **First Name**
- **Employee ID**
- **Earliest Change Date**
- **Department**
- **Workgroup ID**
- **Business**
- **Location Code**
- **Position Number**



Last Name	First Name	Employee ID	Earliest Change Date	Department	Workgroup ID	Business	Location Code	Position Number
ALCOTT	LOUISA	EMP00000001	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ANTHONY	SUSAN	EMP00000002	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ARANA	HECTOR	EMP00000003	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ASHE	ARTHUR	EMP00000005	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
FIELD	MARSHAL	EMP00000004	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001

Timesheet Summary Page: Show All Columns

View the **Time Summary and Demographics** tab information together by clicking the **show all columns** icon.



Change View

*View By Week

Date 10/28/2019

Show Schedule Information

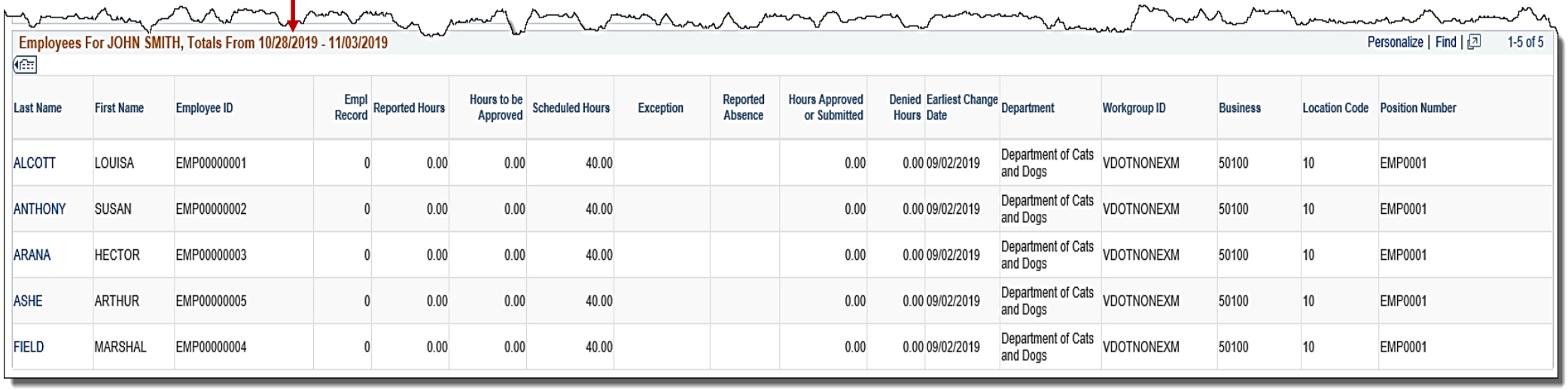
Previous Week Next Week

Employees For JOHN SMITH, Totals From 10/28/2019 - 11/03/2019

Personalize | Find | 1-5 of 5

Time Summary | Demographics

Last Name	First Name	Employee ID	Earliest Change Date	Department	Workgroup ID	Business	Location Code	Position Number
ALCOTT	LOUISA	EMP00000001	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ANTHONY	SUSAN	EMP00000002	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ARANA	HECTOR	EMP00000003	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ASHE	ARTHUR	EMP00000005	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
FIELD	MARSHAL	EMP00000004	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001



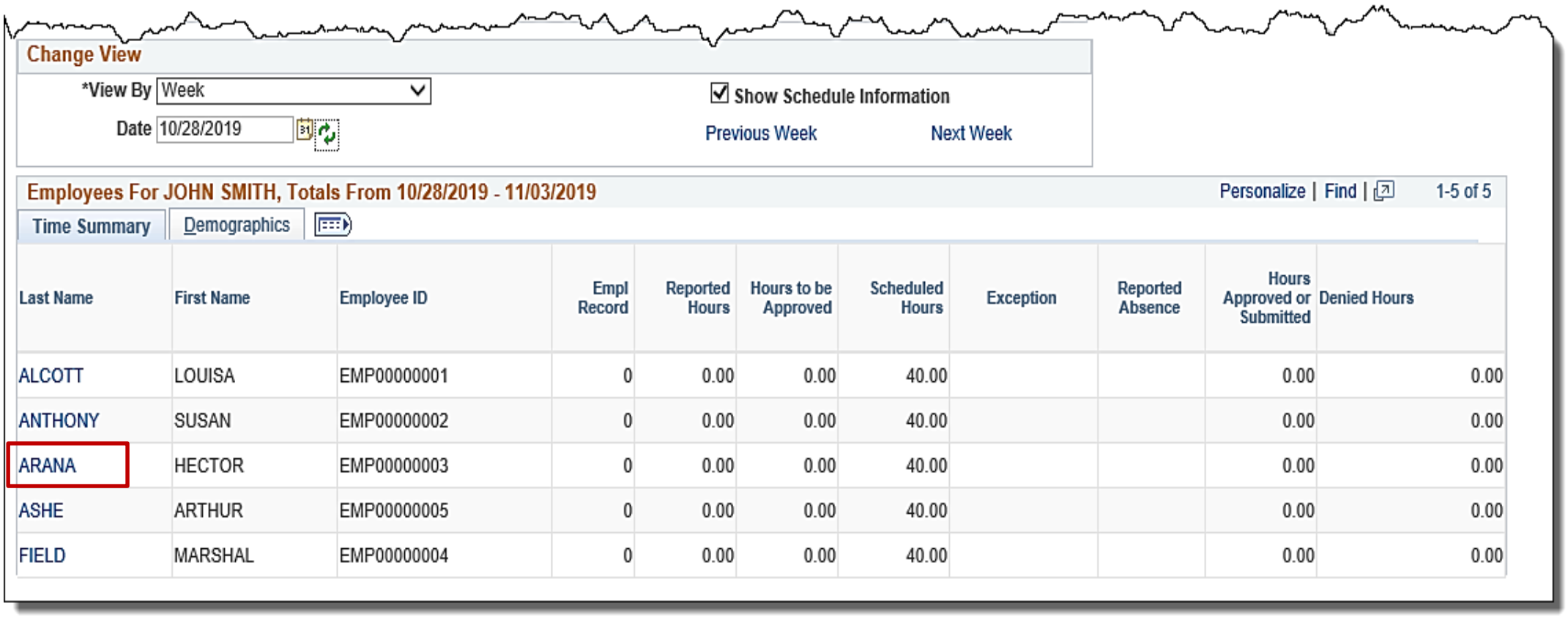
Employees For JOHN SMITH, Totals From 10/28/2019 - 11/03/2019

Personalize | Find | 1-5 of 5

Last Name	First Name	Employee ID	Empl Record	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours	Earliest Change Date	Department	Workgroup ID	Business	Location Code	Position Number
ALCOTT	LOUISA	EMP00000001	0	0.00	0.00	40.00			0.00	0.00	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ANTHONY	SUSAN	EMP00000002	0	0.00	0.00	40.00			0.00	0.00	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ARANA	HECTOR	EMP00000003	0	0.00	0.00	40.00			0.00	0.00	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
ASHE	ARTHUR	EMP00000005	0	0.00	0.00	40.00			0.00	0.00	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001
FIELD	MARSHAL	EMP00000004	0	0.00	0.00	40.00			0.00	0.00	09/02/2019	Department of Cats and Dogs	VDOTNONEXM	50100	10	EMP0001

Timesheet Summary Page: Access Timesheet

To access an employee's Timesheet, click the **Last Name** of the employee.



Last Name	First Name	Employee ID	Empl Record	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
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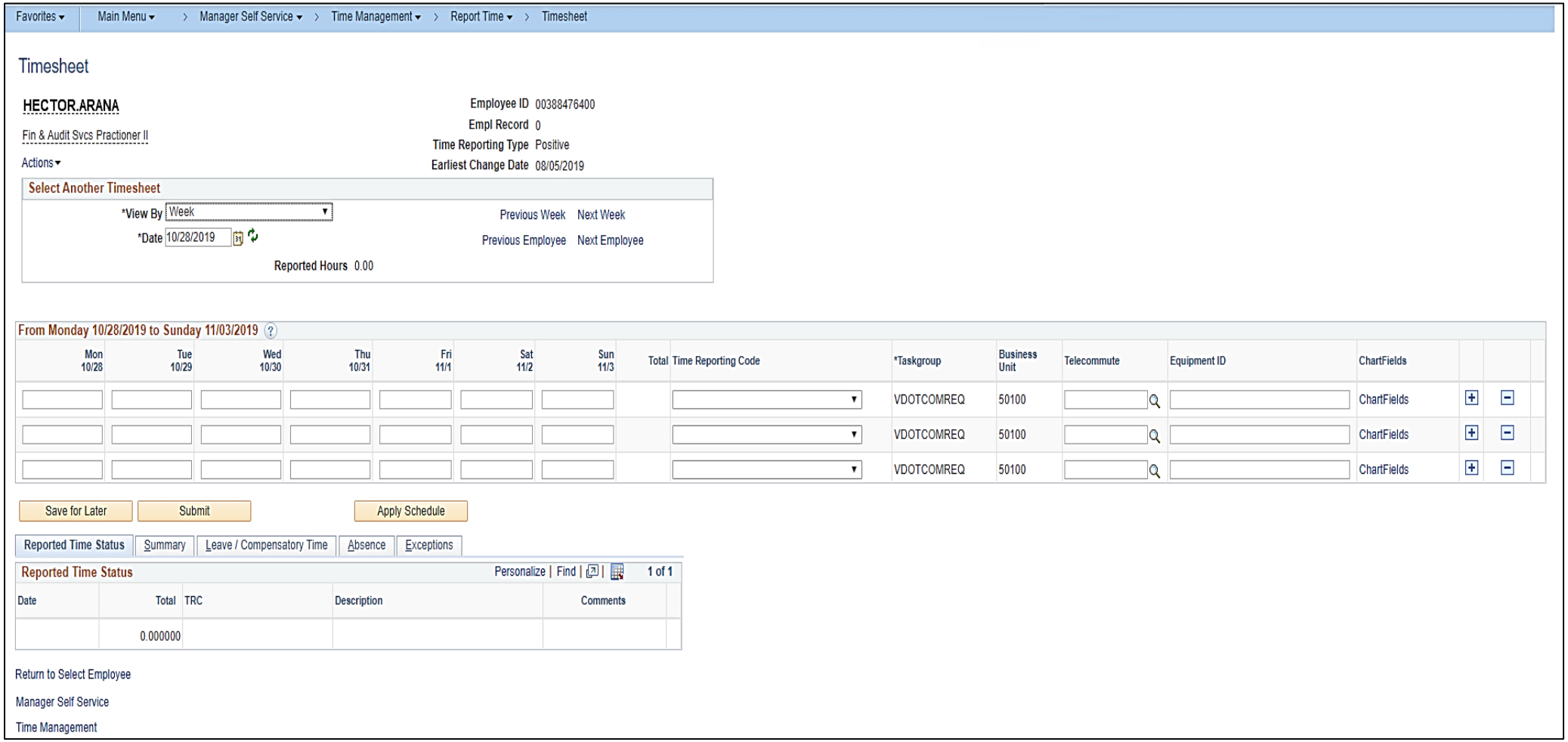
ANTHONY	SUSAN	EMP00000002	0	0.00	0.00	40.00			0.00	0.00
ARANA	HECTOR	EMP00000003	0	0.00	0.00	40.00			0.00	0.00
ASHE	ARTHUR	EMP00000005	0	0.00	0.00	40.00			0.00	0.00
FIELD	MARSHAL	EMP00000004	0	0.00	0.00	40.00			0.00	0.00

The Employee Timesheet

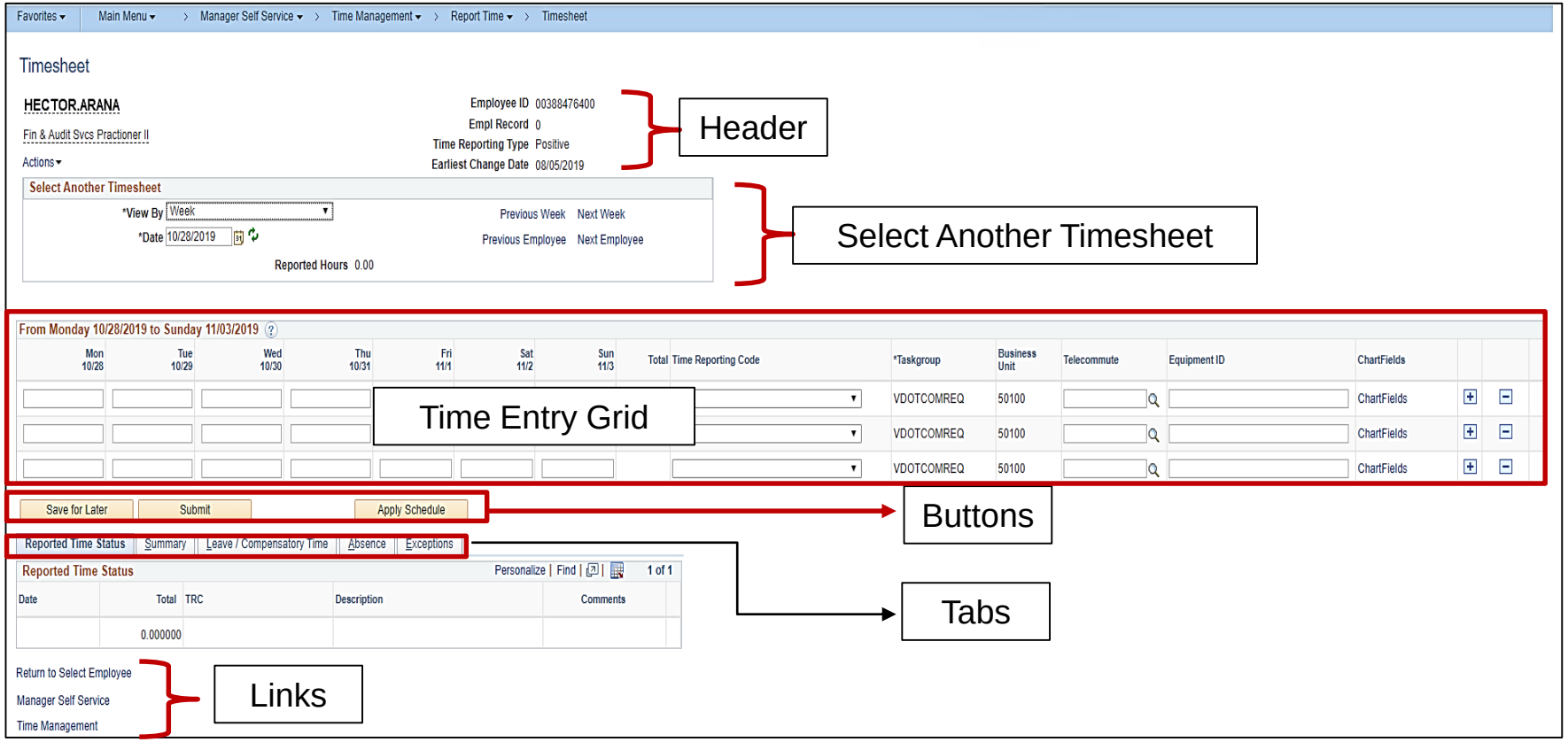
The **Timesheet** page displays. The **Timesheet** page for the timekeeper processor is very similar to the Self Service user view.



The Employee Timesheet (continued)

The timesheet is organized in sections and tabs that help view and update timesheet data.

- **Header Section**
- **Select Another Timesheet**
- **Timesheet Entry Grid**
- **Tabs: Reported Time Status**, **Summary**, **Absence (for eligible salaried employees)**, **Compensatory Leave (for employees who are eligible)**, and **Exceptions**
- **Buttons**
- **Links**



The Timesheet Page (continued)

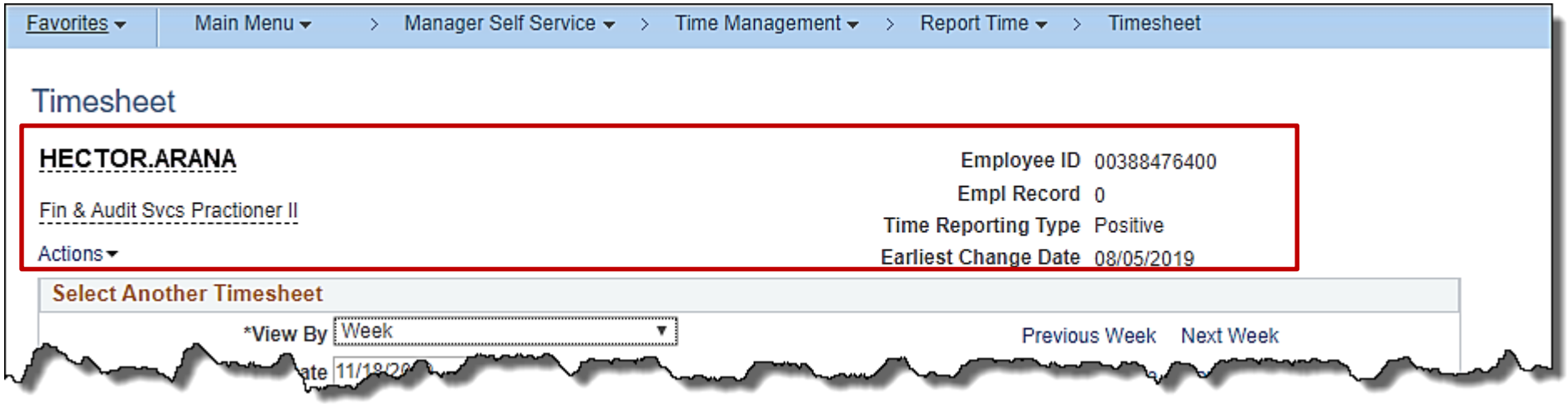
The **Header Section** identifies the employee by **Name**, **Employee ID**, **Job Title**, **Employee Record**, and **Time Reporting Type**. **Empl Record** field: defaults to **0** for your primary job. If you have another job within the state, then the Record for the additional job will increment by 1.

Time Reporting Type field has two values configured:

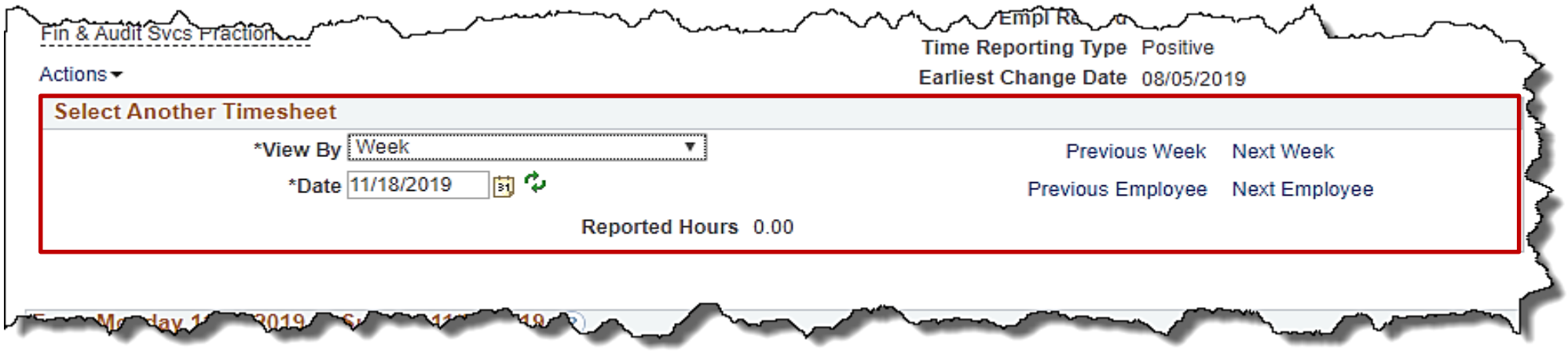
- **Positive**: employees report all time worked on the Timesheet. **Note**: all VDOT employees are this type.
- **Exception**: employees do not need to report regular time; only exceptions to the regular time (e.g., vacation, sick)

The **Actions** dropdown is not used at this time in Cardinal.

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.



The Timesheet Page (continued)



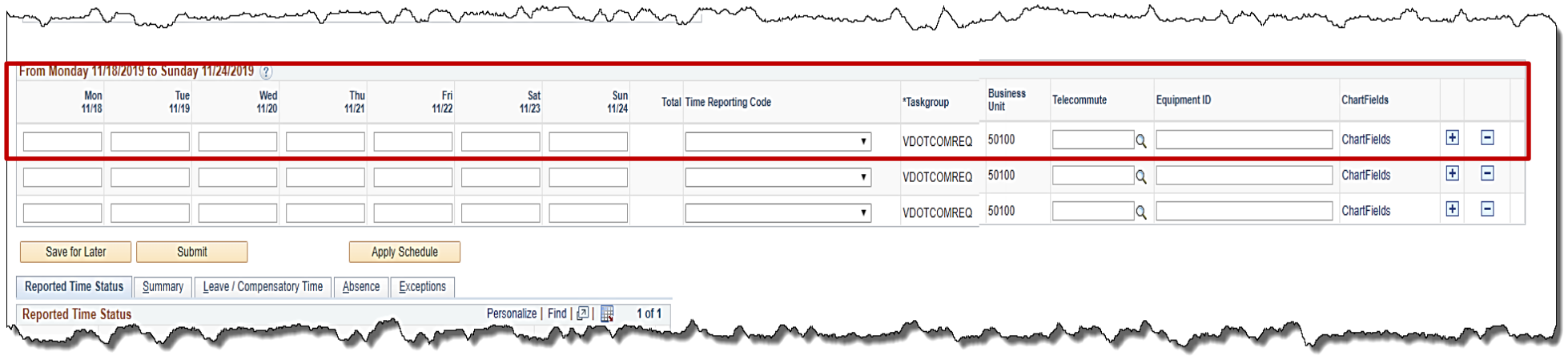
You can use the **Select Another Timesheet** section to change the view of the timesheet and the calendar period.

- **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.
- **Previous Employee/Next Employee** Select to these links to move to additional employees when more than one displays based on the criterial entered on the Timesheet Summary page. If the criteria entered only returns one employee, these links do not display.
- **Reported Hours** – This field displays the hours reported on the timesheet for week.

The Timesheet Page (continued)

The Timesheet Report section:

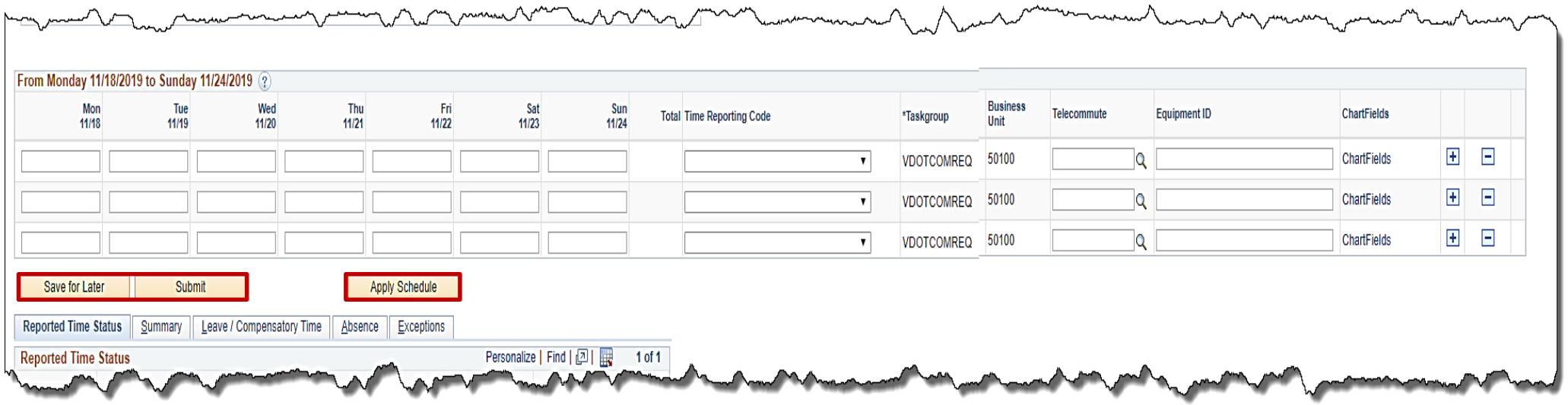
- Enter hours for each day by **Time Reporting Code (TRC),** e.g., **RGS**
- **Taskgroup:** Defaults and cannot be changed
- **Business Unit -** Defaults and cannot be changed
- **Telecommute** (if applicable) - Identify Hours as Telecommute if worked from out of office
- **Equipment ID** (if applicable) - 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



The Timesheet Page (continued)

Directly below the timesheet entry grid are two buttons:

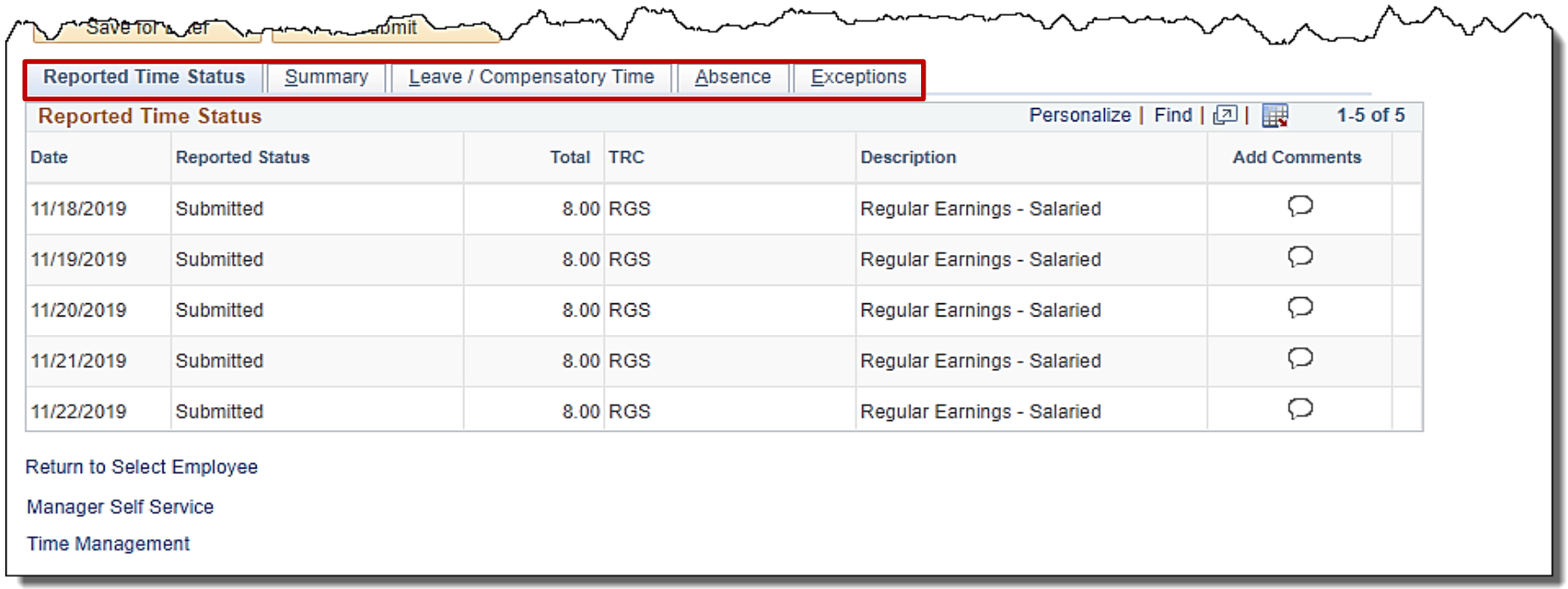
- **Save for Later -** Saves entries on the **Timesheet** page. Saving time places it on hold on the page and does **not** send it to be processed.
- **Submit -** Submits time entered in the timesheet grid to be processed and submits absence requests to the approver for approval.
- **Apply Schedule -** auto-populates the employee's timesheet with the schedule identified in Cardinal on the **Assign Work Schedule** page.



The Timesheet Page Tabs

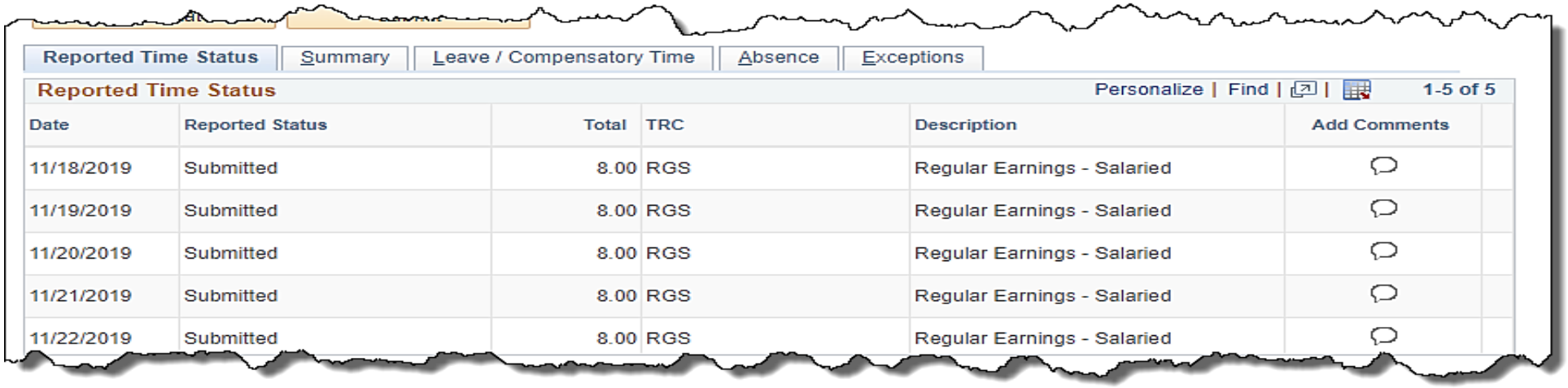
Tabs on the **Timesheet** include:

- **Reported Time Status -** Provides a view of the time entered by date and its **Reported Time Status**. The status of an absence event 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.



The Timesheet Page Tabs (continued)

Reported Time Status: Click this tab to view the regular, overtime, and compensatory time as well as absences that have been entered by date and check on its status.

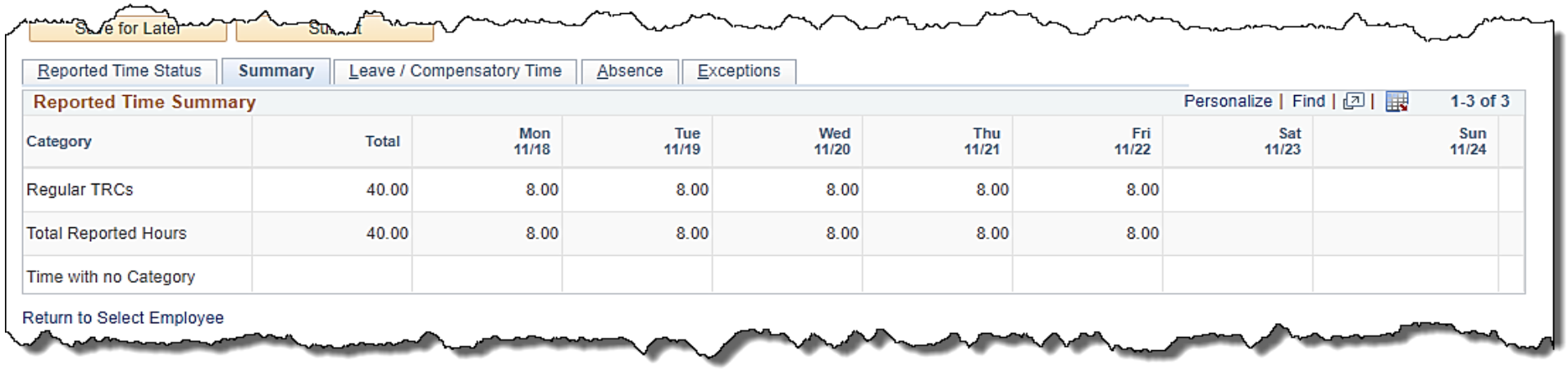


Reported Time Status | Summary | Leave / Compensatory Time | Absence | Exceptions

Reported Time Status — Personalize | Find | 1-5 of 5

Date	Reported Status	Total	TRC	Description	Add Comments
11/18/2019	Submitted	8.00	RGS	Regular Earnings - Salaried	
11/19/2019	Submitted	8.00	RGS	Regular Earnings - Salaried	
11/20/2019	Submitted	8.00	RGS	Regular Earnings - Salaried	
11/21/2019	Submitted	8.00	RGS	Regular Earnings - Salaried	
11/22/2019	Submitted	8.00	RGS	Regular Earnings - Salaried	

Reported Time Summary: Expand this section to view summary of your time.



Reported Time Status | Summary | Leave / Compensatory Time | Absence | Exceptions

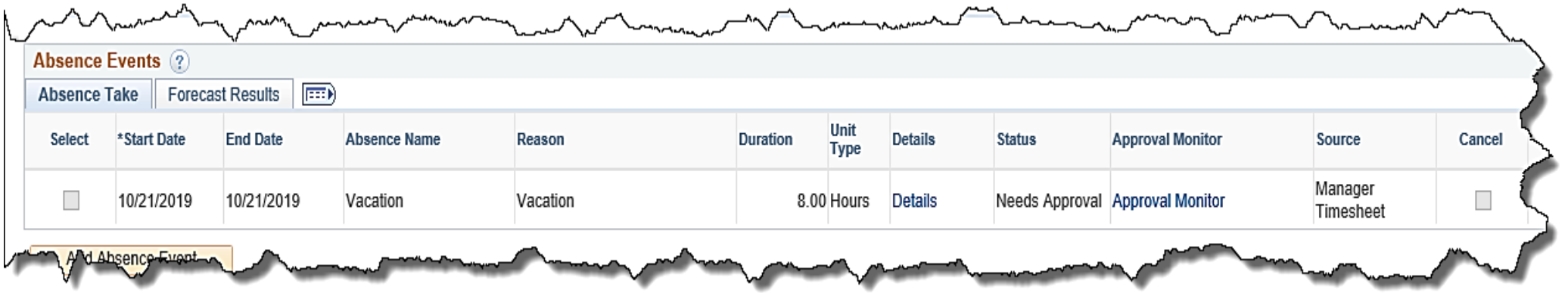
Reported Time Summary — Personalize | Find | 1-3 of 3

Category	Total	Mon 11/18	Tue 11/19	Wed 11/20	Thu 11/21	Fri 11/22	Sat 11/23	Sun 11/24
Regular TRCs	40.00	8.00	8.00	8.00	8.00	8.00		
Total Reported Hours	40.00	8.00	8.00	8.00	8.00	8.00		
Time with no Category								

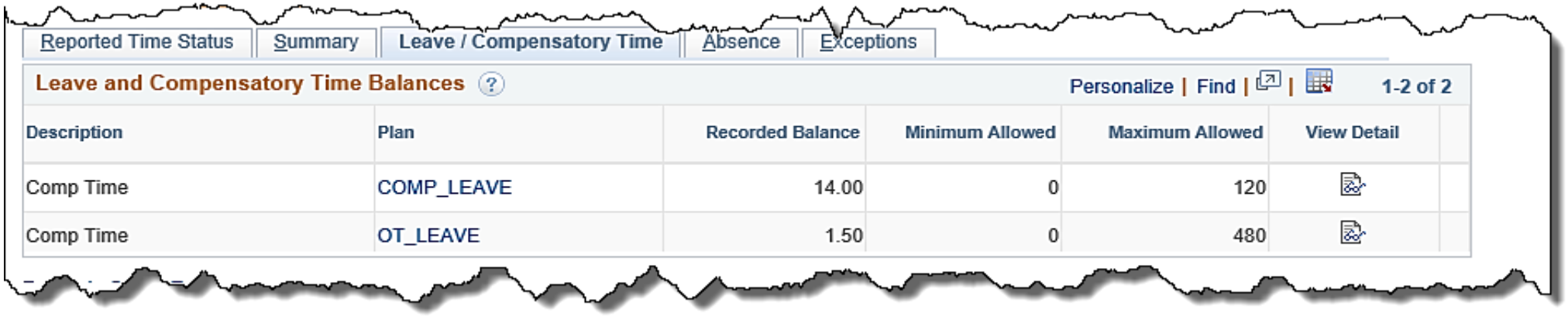
Return to Select Employee

The Timesheet Page Tabs (continued)

Absence - Click this tab to enter absences, view details about outstanding absence requests, and check absence entitlement balances. This tab is only visible to employees who are eligible for absences.



Leave/Compensatory Time - Click this tab to view compensatory or overtime leave balances. This tab is only visible for employees who are eligible for these types of leave.



The Timesheet Page Tabs (continued)

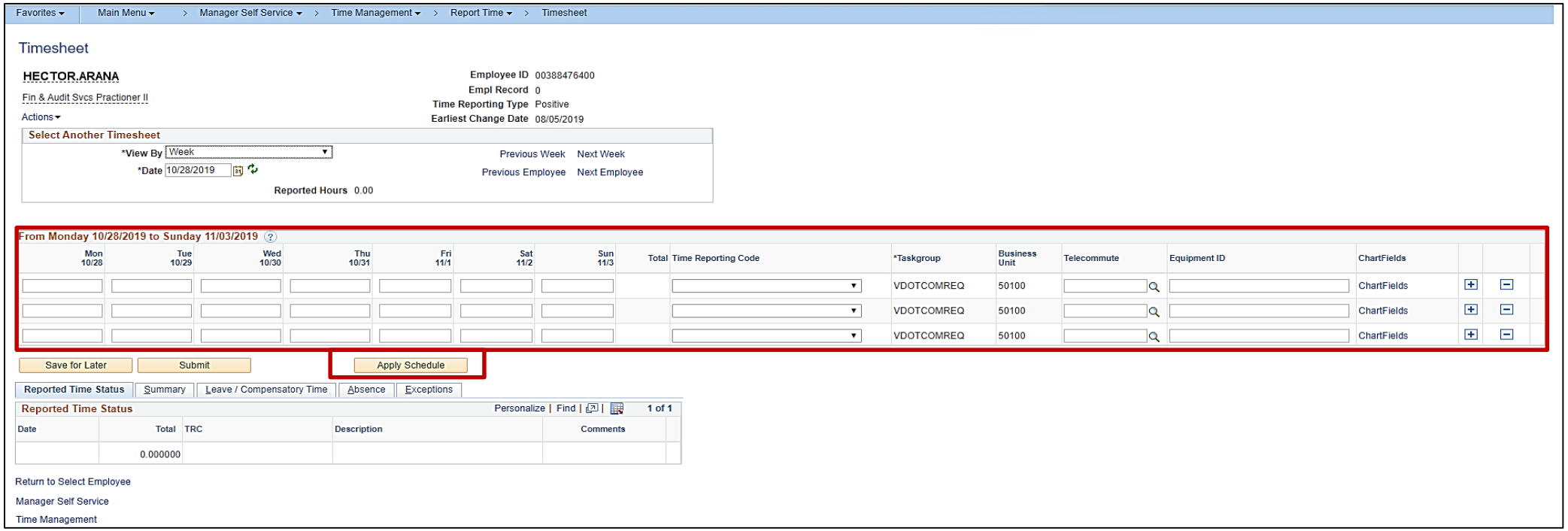
The **Exceptions** tab lists any exceptions identified by the Time Administration process.

Entering Time

Cardinal provides a grid for entering time for each employee. 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.).

Use the **Apply Schedule** to populate the week with the employee's standard work schedule.

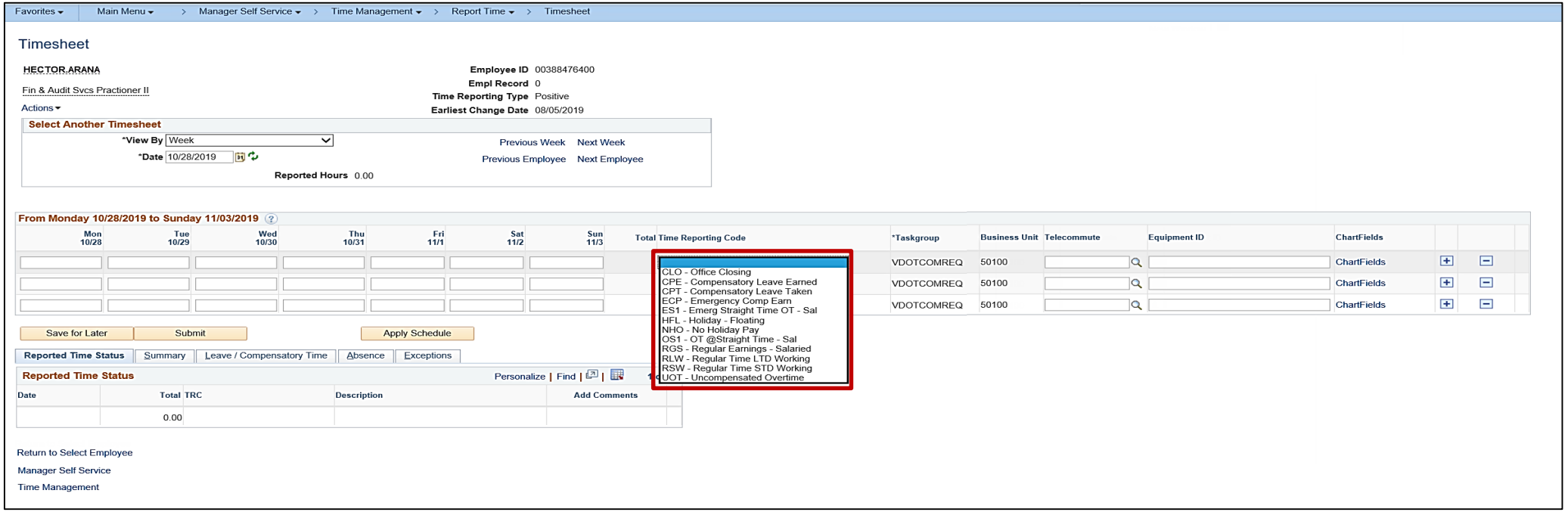
Cardinal allows entry of time up to 90 days into the future for leave and productive hours. Since ChartFields for productive hours may become inactive, it is recommended to enter only absences (non-productive) in advance. Follow your agency's policy regarding the entry of future time.



Entering Time (continued)

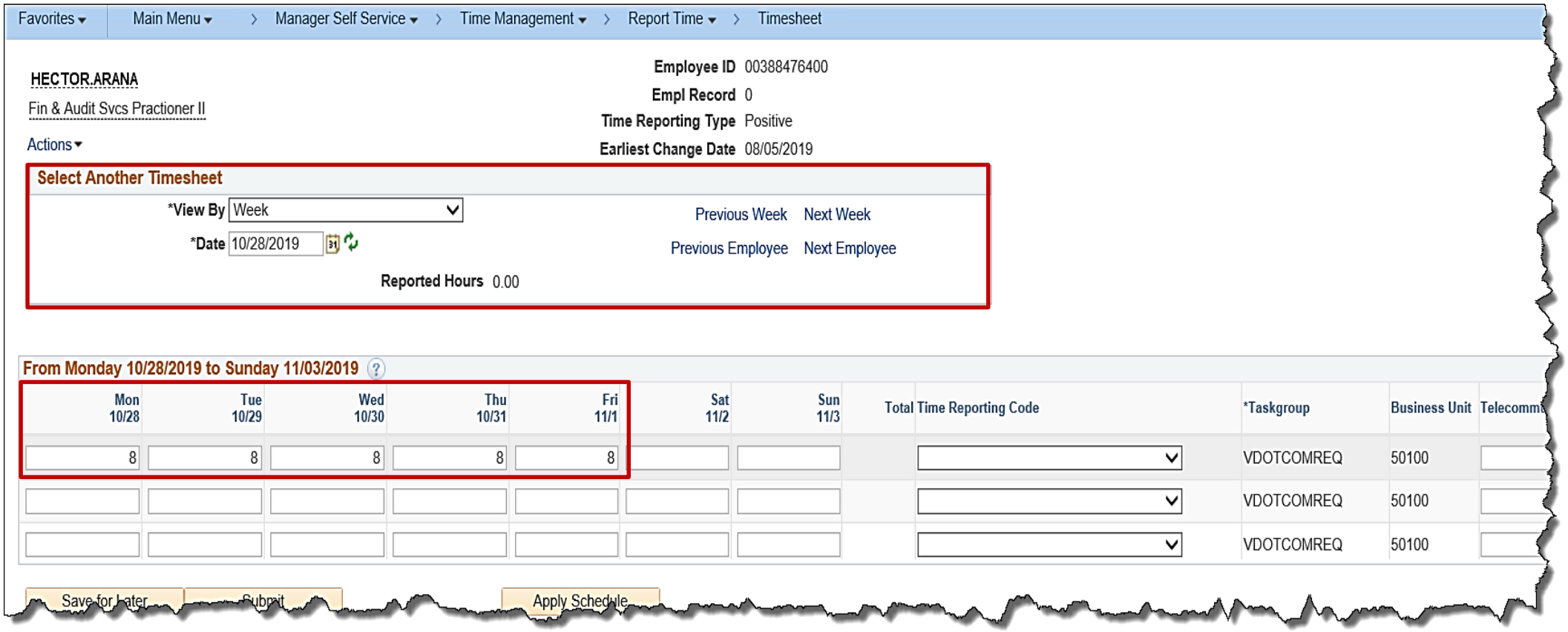
The weekly time entry grid allows entry of multiple days for each unique combination of:

- **Time Reporting Code** (TRC) - For each set of hours assign the appropriate TRC
- **Taskgroup** – Defaults and cannot be changed
- **Business Unit** – Defaults and cannot be changed
- **Telecommute** (if applicable) – Identify hours as **Telecommute** if worked from outside of the office
- **Equipment ID** (if applicable) – Identify a specific piece of equipment that 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 be added or deleted on the **Timesheet** page



Entering Regular Time and Overtime

Cardinal provides a grid for entering an employee's 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.).

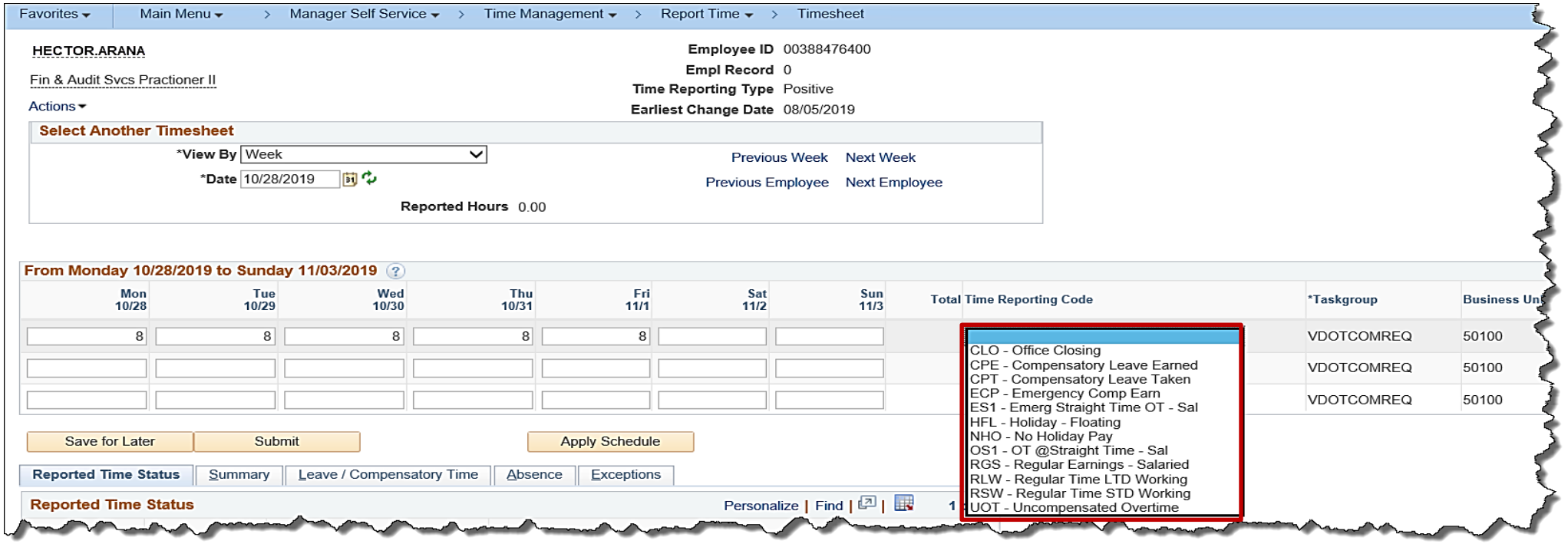


Time Reporting Codes

All hours entered on the timesheet are classified by **Time Reporting Codes** (TRCs) which describe the nature of the time being reported.

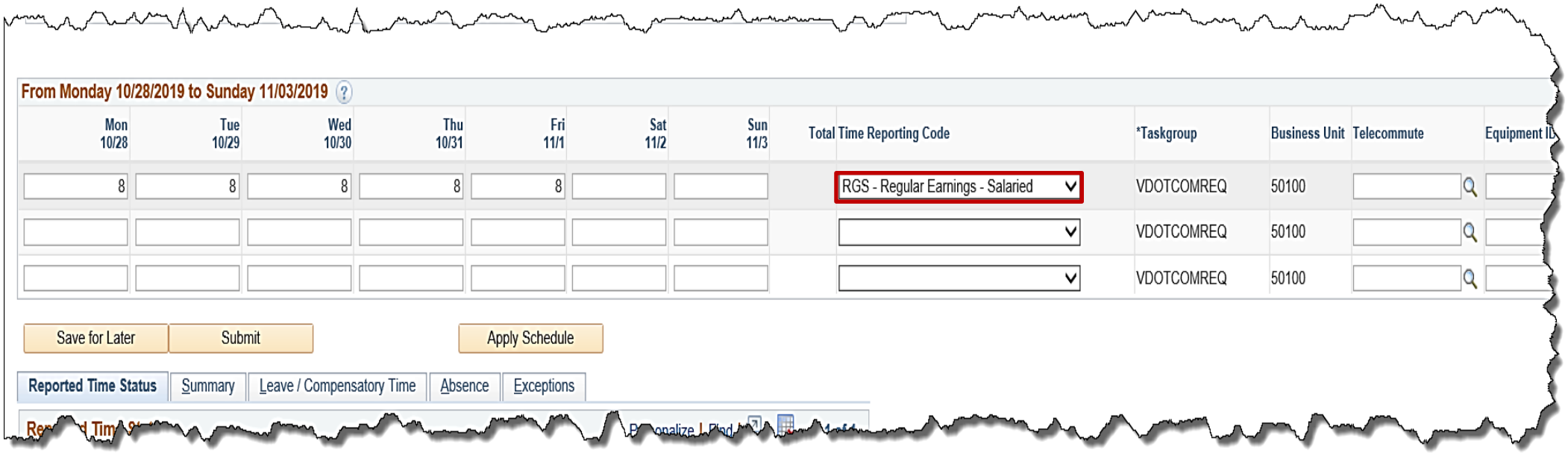
All employees are assigned to a **Workgroup**, which determines the TRCs that are available to them. For example, TRCs for compensatory/overtime earned and taken are available only to employees in Workgroups that allow those TRCs.

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



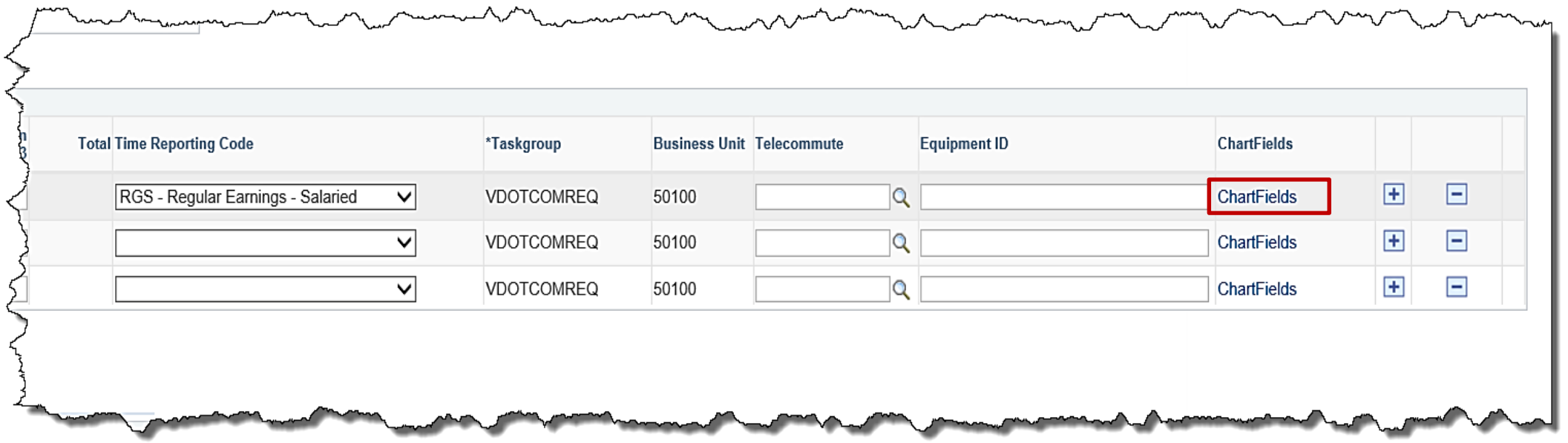
Time Reporting Codes (continued)

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.

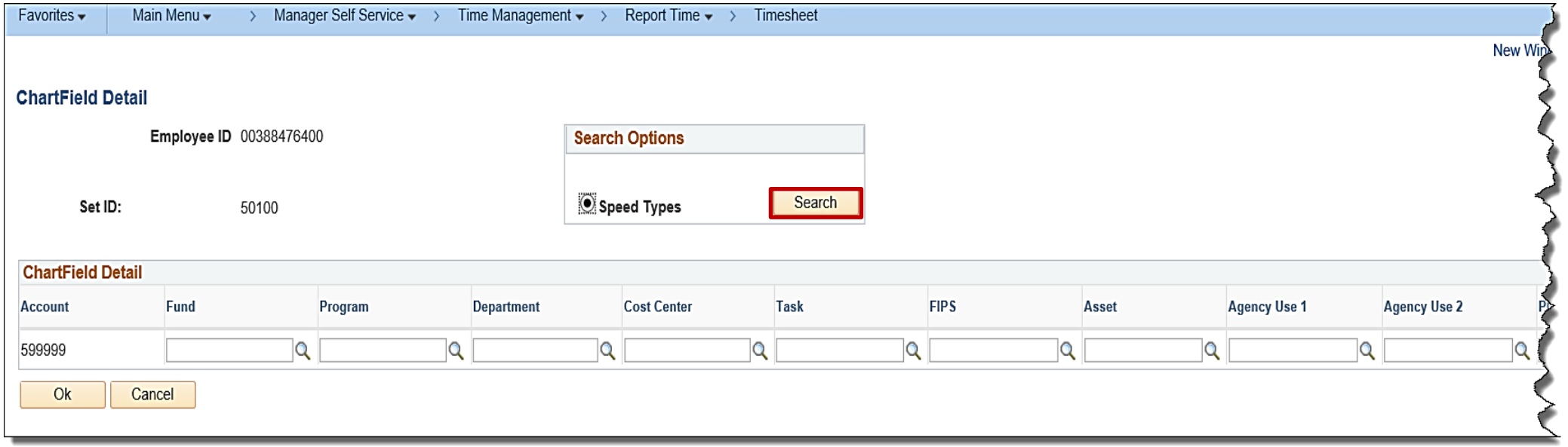


ChartField Detail Page

The **ChartField Detail** pop-up window displays. It is used to enter the charge distribution information related to the hours entered on that line of the Timesheet page. If the user knows where time needs to charged, it can be entered on this page. Use the scroll bar at the bottom of the page to view more ChartFields (to the right).

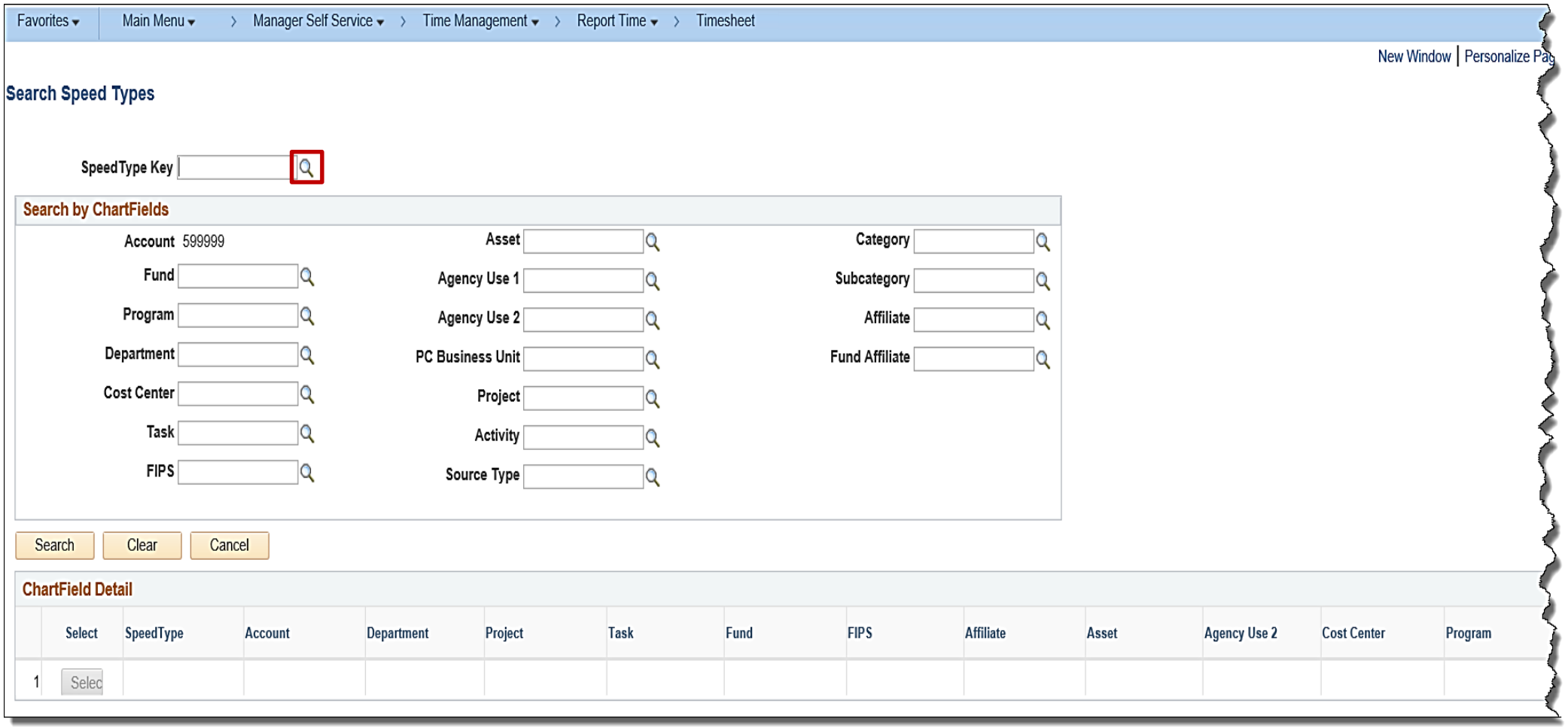
Note: Some distributions are automatically set to default based on the Time Reporting Code selected, e.g., office closing, Holiday, etc. In those cases, the **Search** button is grayed out. TRCs with default ChartField values still require accessing the **ChartField Detail** page. Click the **OK** button to accept them.

For this scenario, Speed Types will be used. Click the **Search** button.



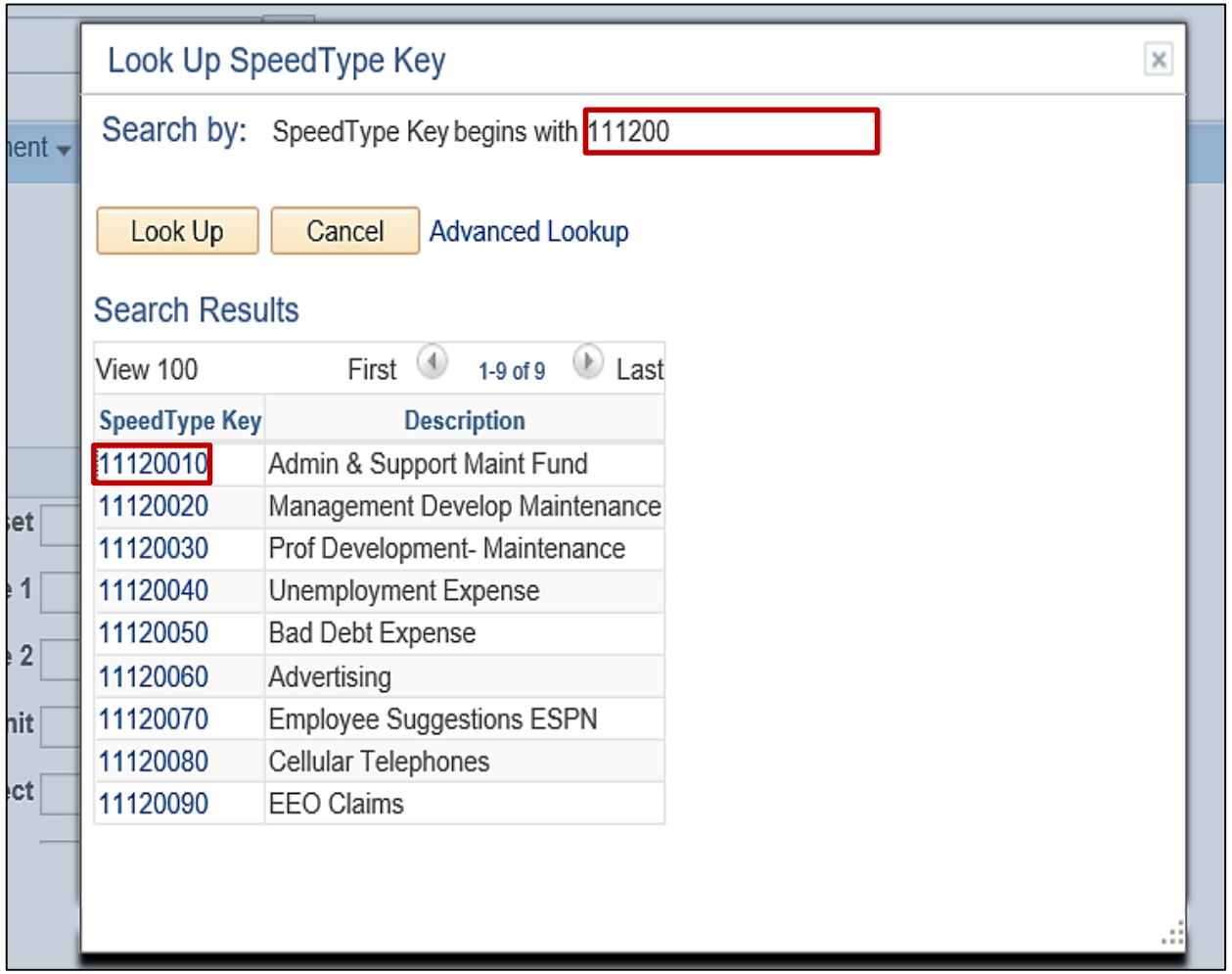
Searching Speed Types

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.



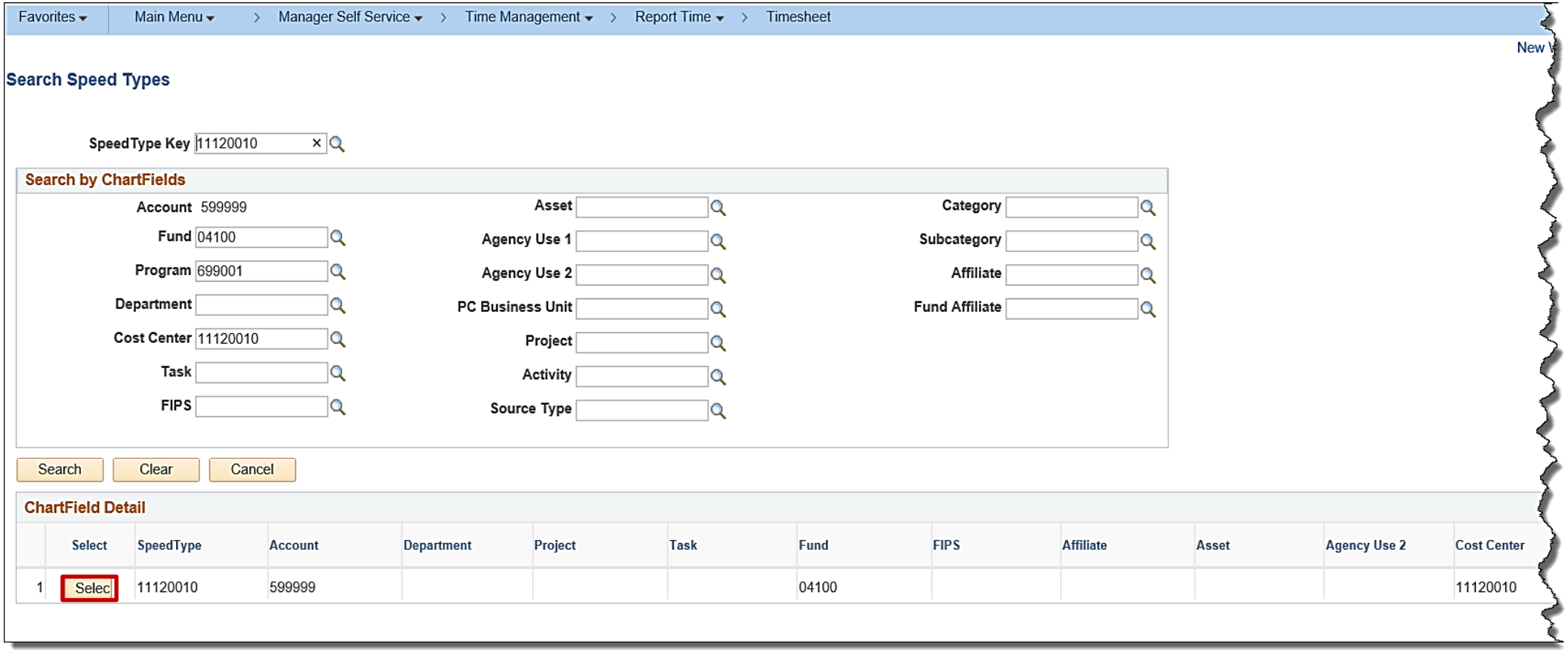
Steps to Enter Speed Types

- 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 code should be directed to your approver.
- Click the **Lookup** button.
- SpeedType keys that match what you have entered display.
- Click the appropriate **SpeedType Key** (note this is a hyperlink) under **Search Results**.



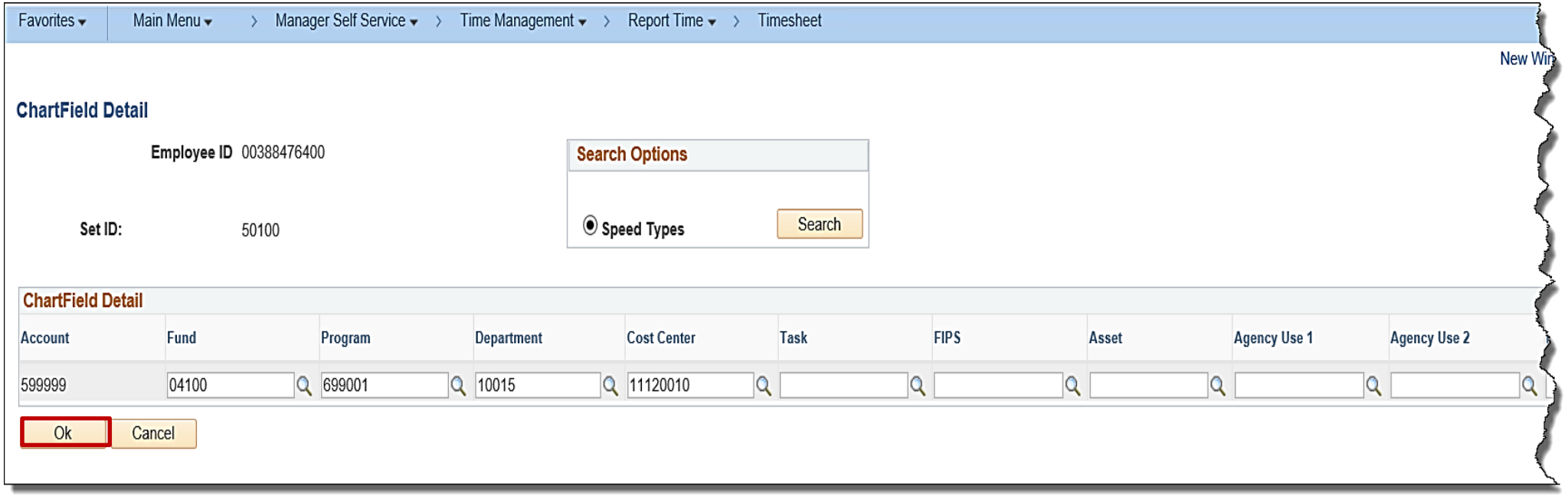
Steps to Enter Speed Types (continued)

- The **Search SpeedTypes** page returns with populated SpeedType values based on the selection made.
- 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 Speed Types (continued)

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

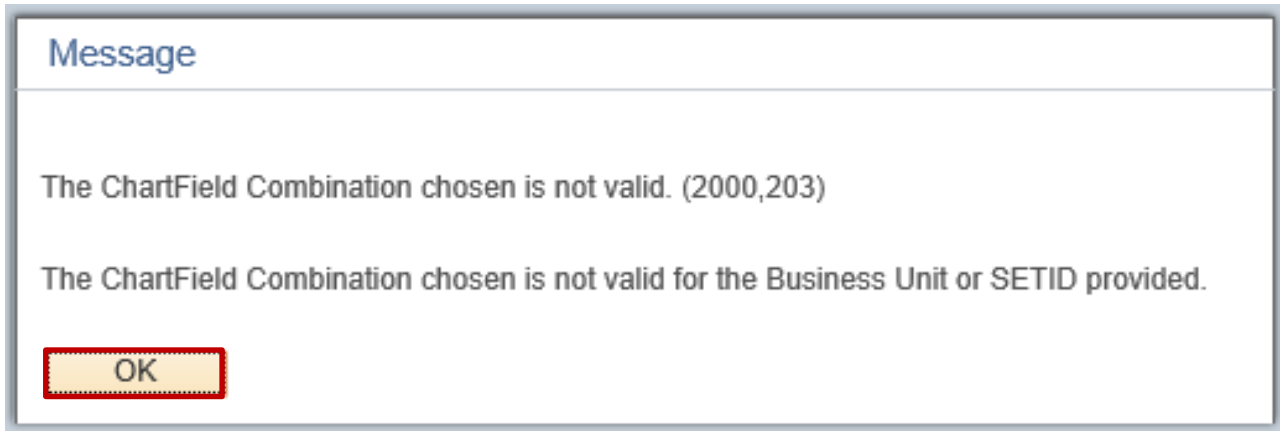


Steps to Enter SpeedTypes (continued)

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.



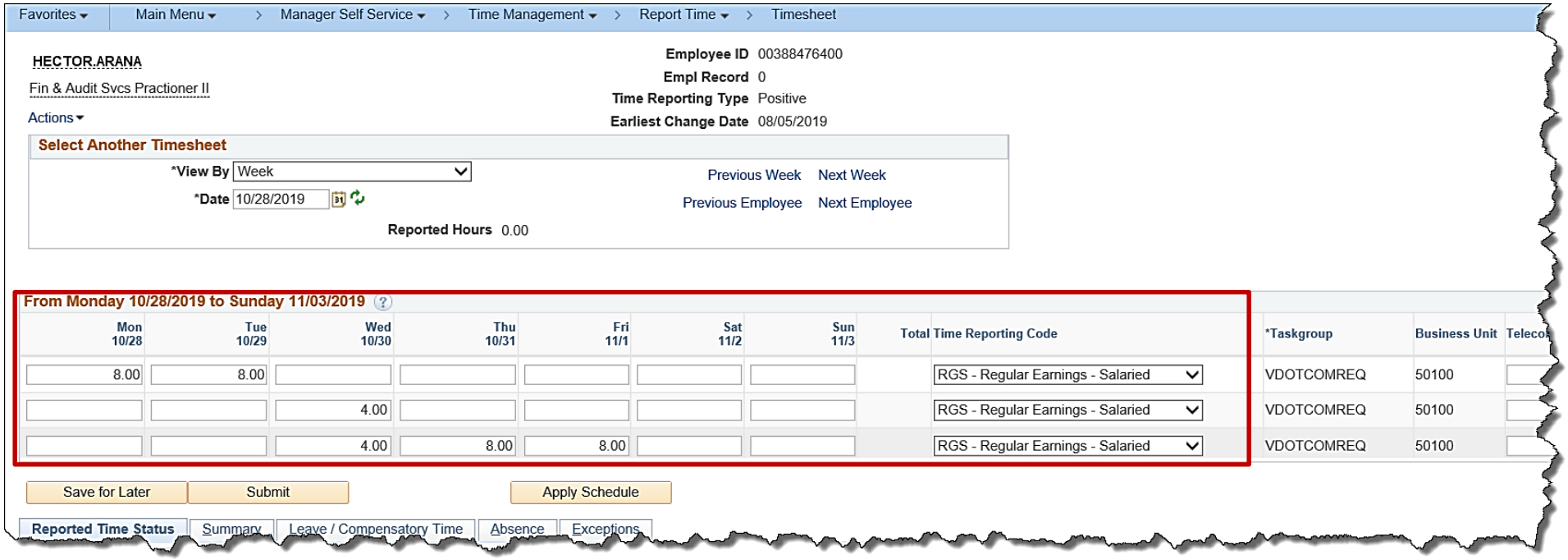
Charging Time to Multiple Distributions

The timesheet grid format allows multiple days entry on one line 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:

- Eight RGS hours Monday and Tuesday on Project A
- Four RGS hours on Wednesday on Project B
- Four RGS hours on Wednesday and eight RGS hours on Thursday and Friday on Project C



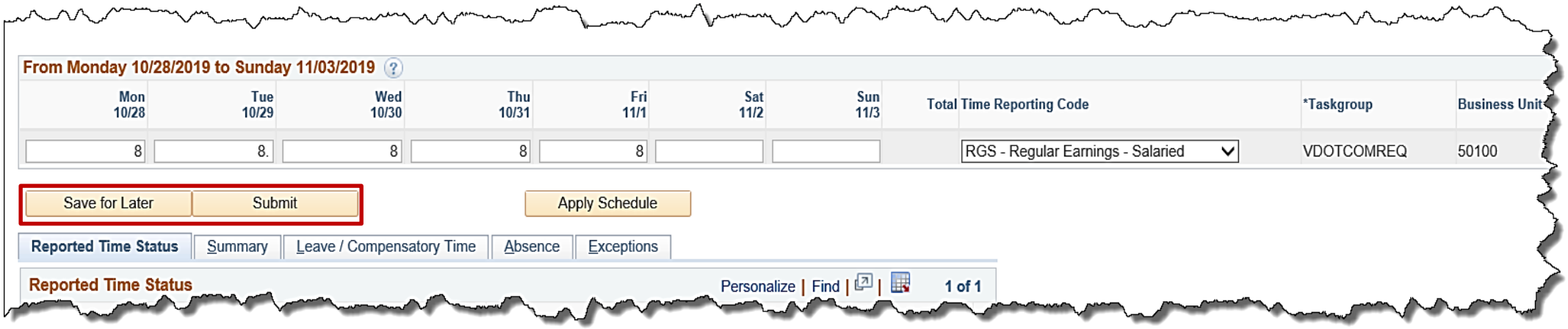
Submitting Time on Individual Timesheet

Once entering time is completed **Save for Later** or **Submit**.

Use caution when using the **Save for Later** button. Note that saving time entries for later does not notify Time Administration there is time to be processed. The **Submit** button triggers the time to be processed by Time Administration during the next batch process.

Time Administration will identify any exceptions to time reporting rules in time submitted. When you **Submit time**, Cardinal sets the process date to the Monday of that week. Otherwise, only hours reported in that current week are submitted.

Submitting time weekly is recommended; at the end of pay periods it is required.

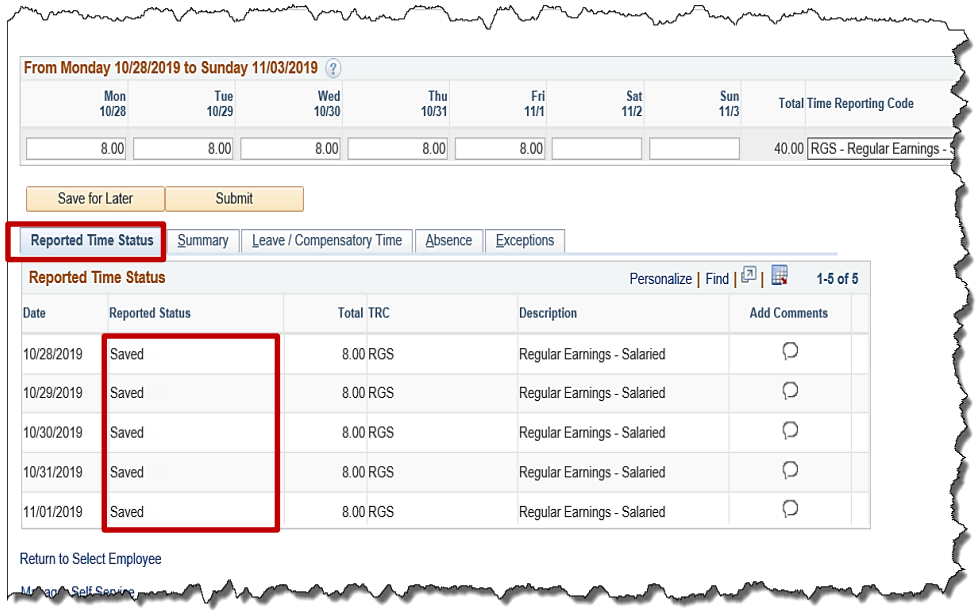


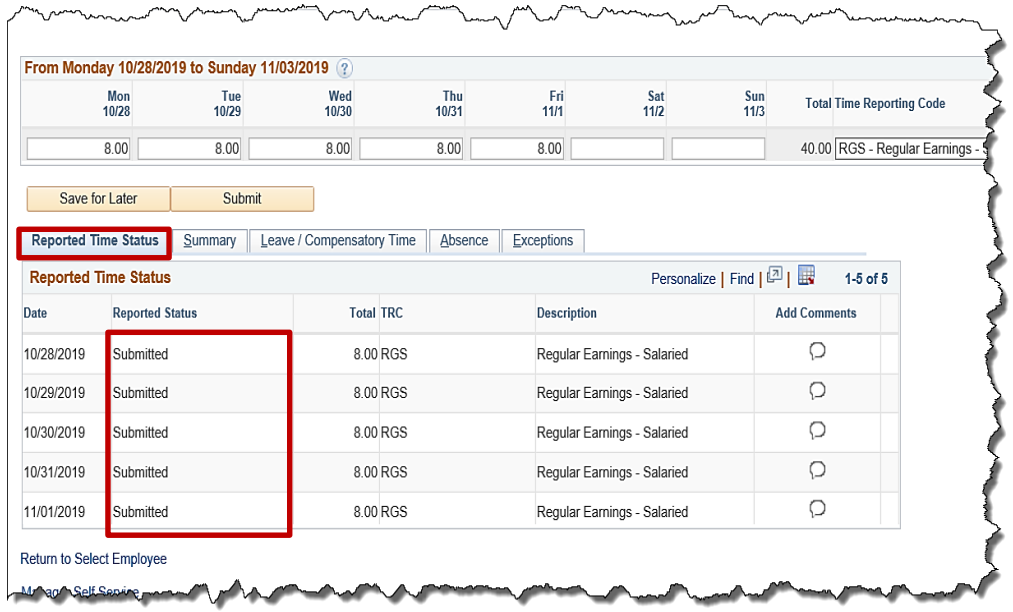
Saved vs Submitted Time

Cardinal allows the user to submit the timesheet or to save the timesheet 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 Timesheet Status

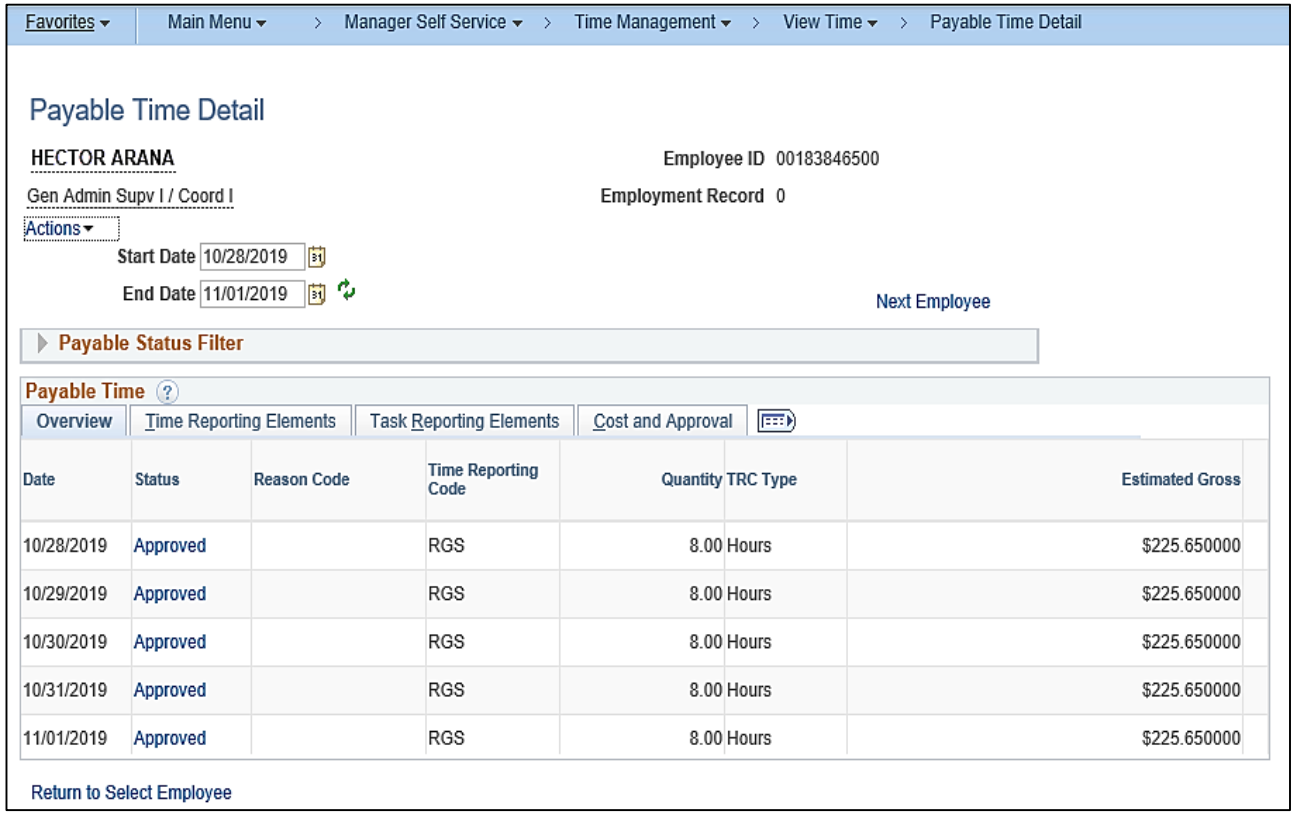
Once time is submitted, it is processed by Time Administration, a batch process that runs periodically throughout the day.

Time Administration:

- Validates reported time against time reporting rules.
- Generates what is called Payable Time (i.e., the final submitted time that is approved and paid).
- Identifies any exceptions to reported time.
- Routes time to each employee's supervisor for approval.

To view the approval status navigate, to the **Payable Time Detail** page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > View Time > Payable Time Detail



ViewingTimesheet Status (continued)

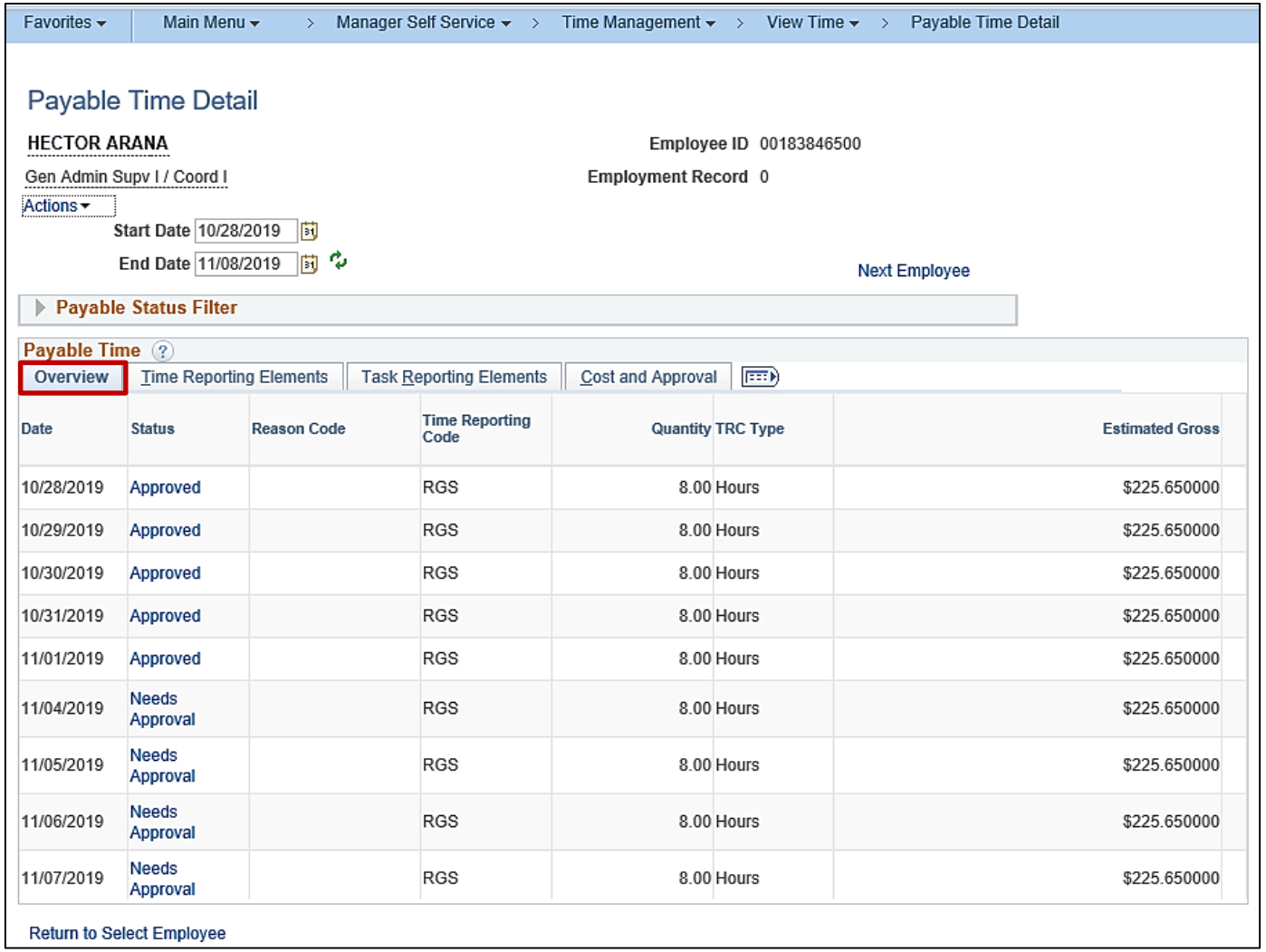
On the **Overview** tab, the **Status** field displays one of two values related to approval:

- **Needs Approval**: waiting for supervisor approval
- **Approved**: approved by the supervisor

It can also display three statuses applicable to the allocation process:

- Taken by Payroll
- Rejected by Payroll
- Distributed

Note: If payable time entries are not displayed as expected on the **Payable Time Detail** page, check for high severity exceptions as they must be corrected before Time Administration can generate payable time.

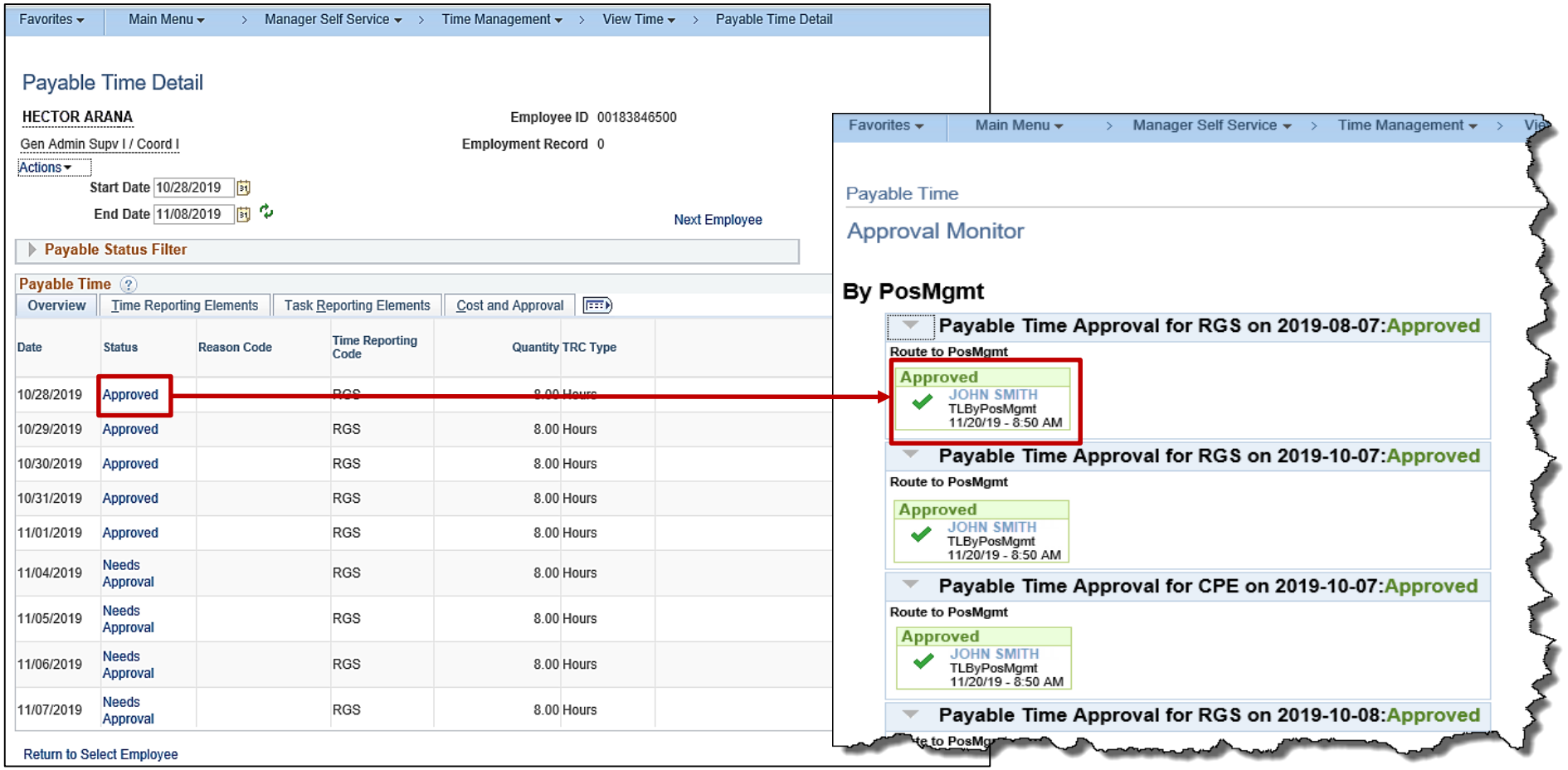


Date	Status	Reason Code	Time Reporting Code	Quantity	TRC Type	Estimated Gross
10/28/2019	Approved		RGS	8.00	Hours	$225.650000
10/29/2019	Approved		RGS	8.00	Hours	$225.650000
10/30/2019	Approved		RGS	8.00	Hours	$225.650000
10/31/2019	Approved		RGS	8.00	Hours	$225.650000
11/01/2019	Approved		RGS	8.00	Hours	$225.650000
11/04/2019	Needs Approval		RGS	8.00	Hours	$225.650000
11/05/2019	Needs Approval		RGS	8.00	Hours	$225.650000
11/06/2019	Needs Approval		RGS	8.00	Hours	$225.650000
11/07/2019	Needs Approval		RGS	8.00	Hours	$225.650000

Viewing/Submitting Timesheet Status (continued)

To identify approvers check the **Approver Monitor** from **the Payable Time Detail** page.

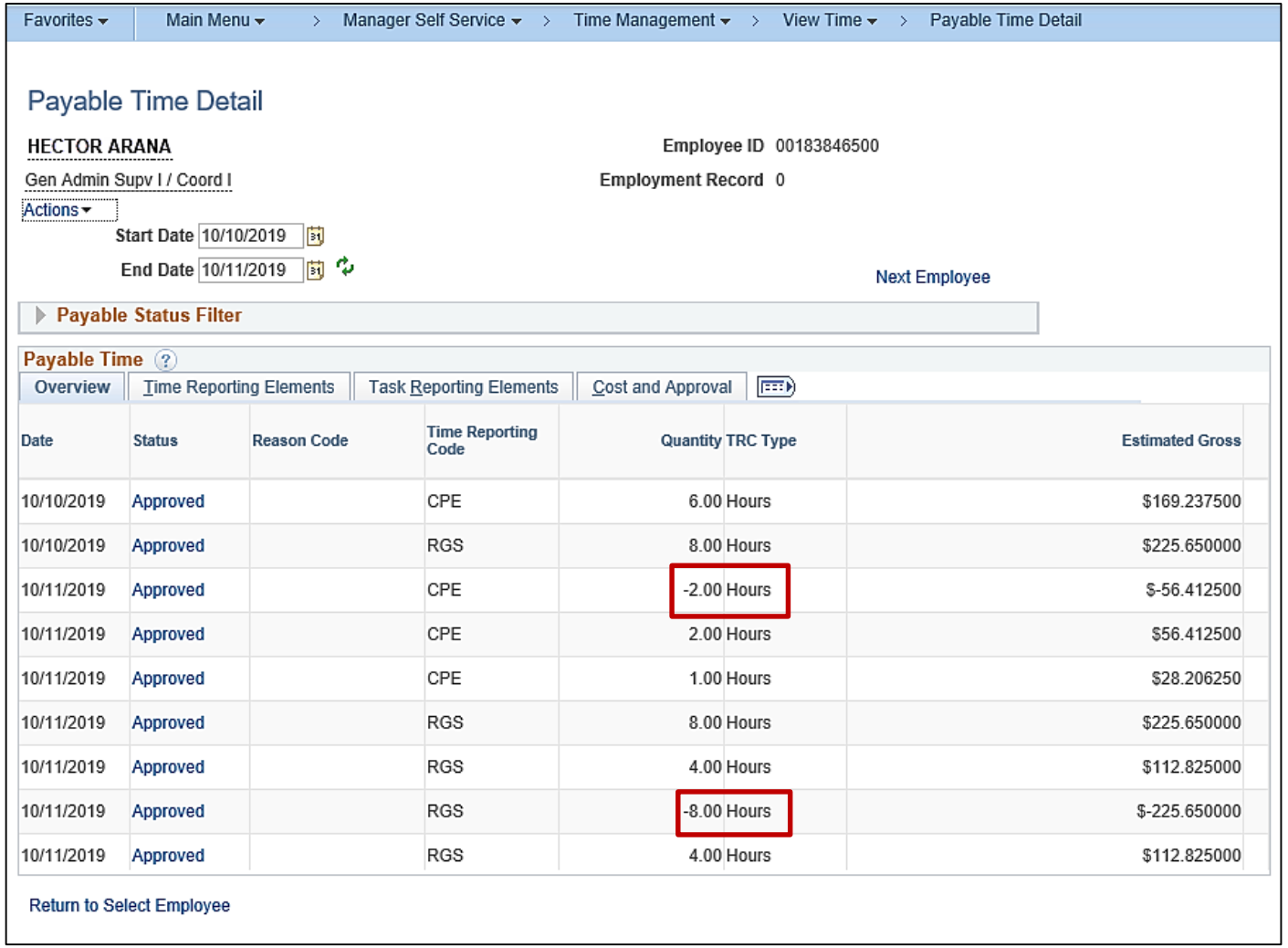
Access the **Approval Monitor** page by clicking on the **Status** link to identify the workflow routing for approval.



Viewing/Submitting Timesheet Status (continued)

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

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



Date	Status	Reason Code	Time Reporting Code	Quantity	TRC Type	Estimated Gross
10/10/2019	Approved		CPE	6.00	Hours	$169.237500
10/10/2019	Approved		RGS	8.00	Hours	$225.650000
10/11/2019	Approved		CPE	-2.00	Hours	$-56.412500
10/11/2019	Approved		CPE	2.00	Hours	$56.412500
10/11/2019	Approved		CPE	1.00	Hours	$28.206250
10/11/2019	Approved		RGS	8.00	Hours	$225.650000
10/11/2019	Approved		RGS	4.00	Hours	$112.825000
10/11/2019	Approved		RGS	-8.00	Hours	$-225.650000
10/11/2019	Approved		RGS	4.00	Hours	$112.825000

Timesheet Lockout

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

When Lockout is in effect, it covers the fiscal year-to-date through the specified pay period end-date for both salaried and hourly timesheets.

During Lockout, for a specific salaried pay period:

- 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, timesheet entry/approval/adjustments can occur for up to six pay periods back but not prior to the first pay period of the current fiscal year.

Compensatory and Overtime Leave

Navigate to the Timesheet page to view earned and taken compensatory and overtime leave.

Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Report Time Time > Timesheet

If employees are eligible, select the following Time Reporting Code(s) and enter them 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

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.

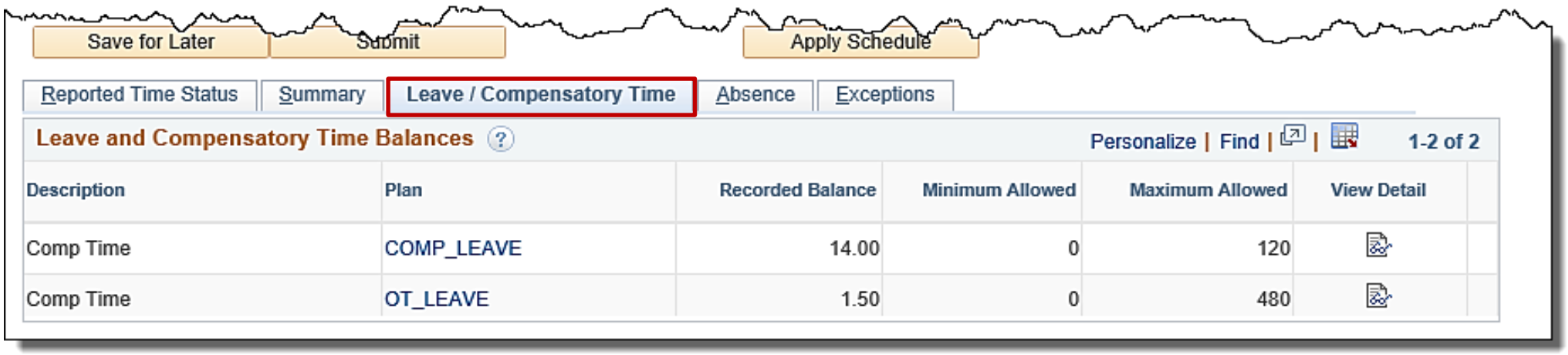
When compensatory or overtime leave is taken, the time should be entered on the timesheet with the corresponding TRC. Cardinal auto-populates the charge distribution on the ChartFields link.

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

Compensatory and Overtime Leave (continued)

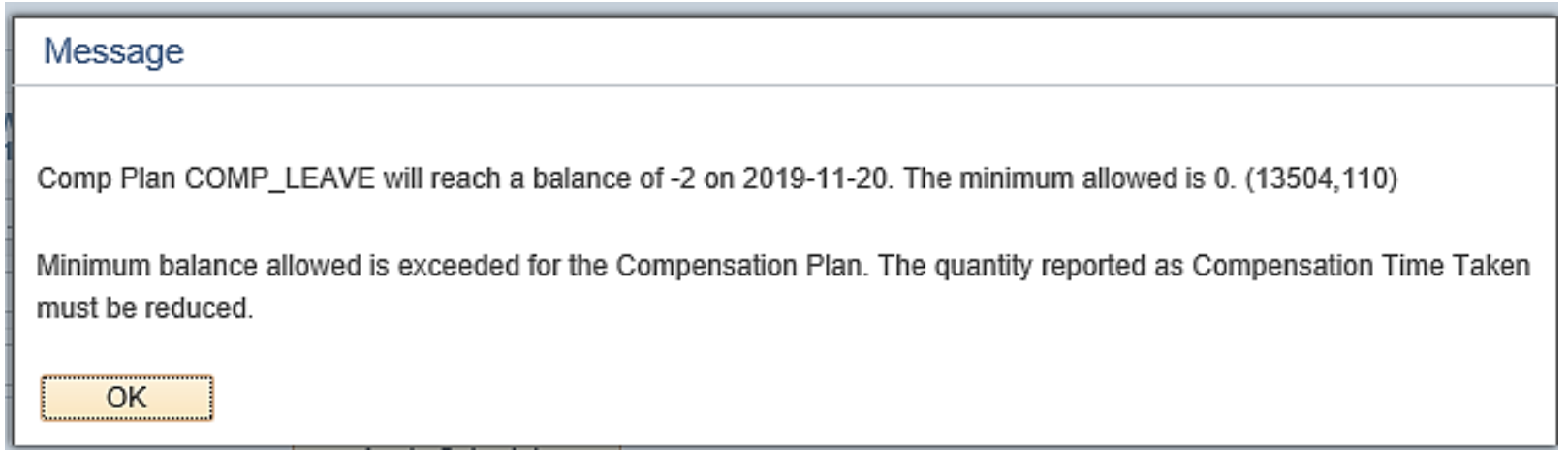
When entering time using the **CPT** or **OTT** TRC, enter the hours and the appropriate TRC. Click the ChartFields link. Cardinal auto-populates the charge distribution. Click the **OK** button to return to the **Timesheet** page.

For more detailed information about charging distribution codes, see the job aid entitled **Time Entry Scenarios** located on the Cardinal website in **Job Aids** under **Training**.



Compensatory and Overtime Leave (continued)

If CPT or OTT are entered for an employee and the balances are not sufficient, a warning message displays.

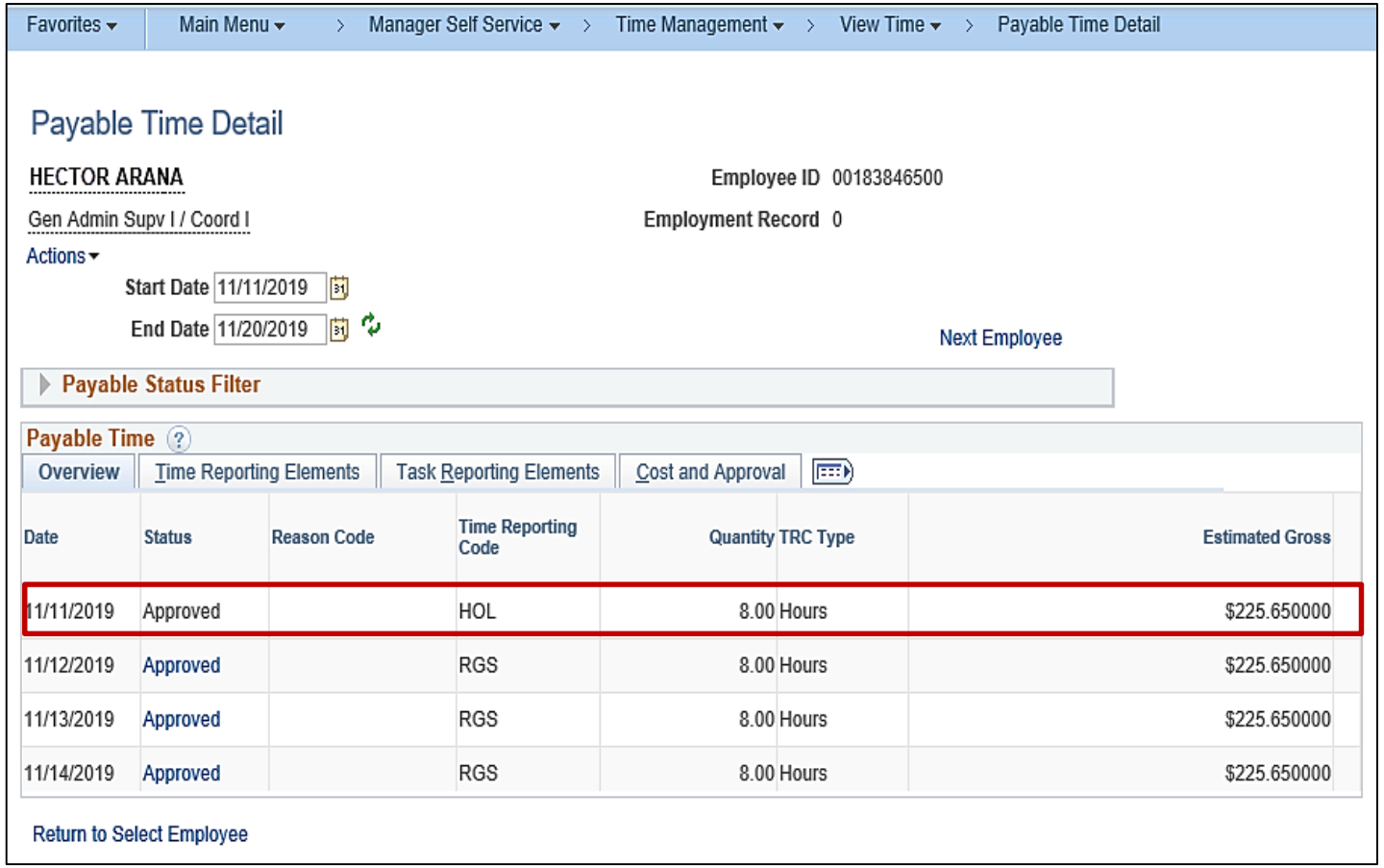


Viewing Holidays

Holidays are automatically generated by Cardinal for applicable employees when Time Administration processes a week with a holiday. Holidays do not display on the timesheet.

To determine whether an employee actually received the Holiday, navigate to the **Payable Time Detail** page using the following navigation path once the Time Administration process has run for that week:

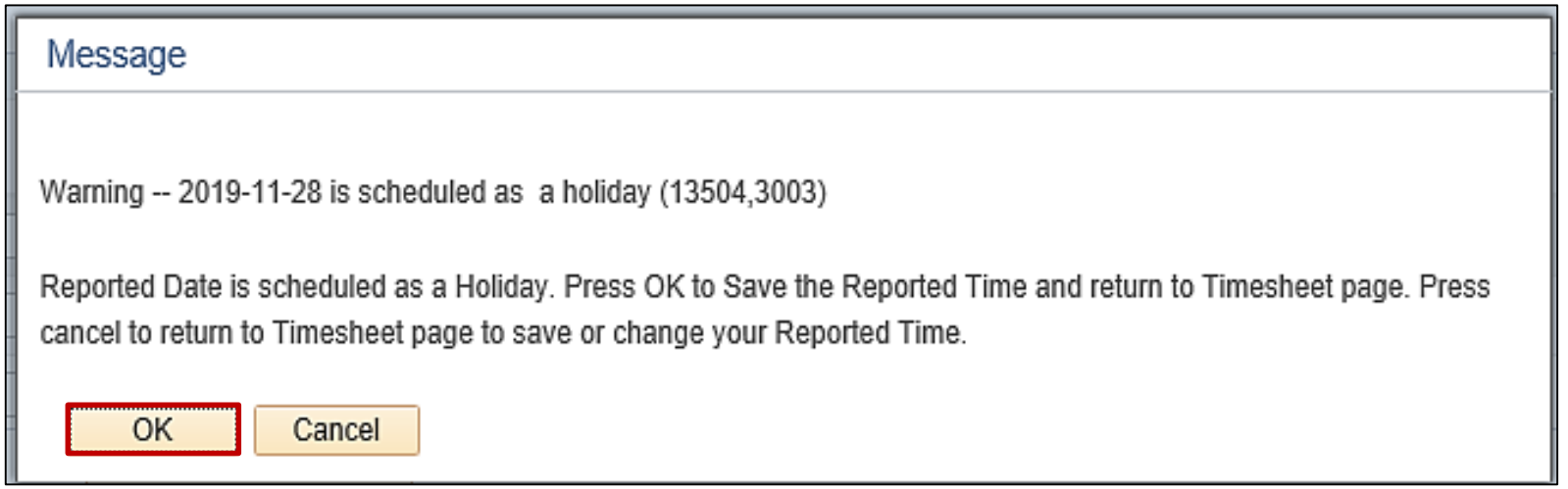
Main Menu > Manager Self Service > Time Management > View Time > Payable Time Detail



Working on a Holiday

If an employee works 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

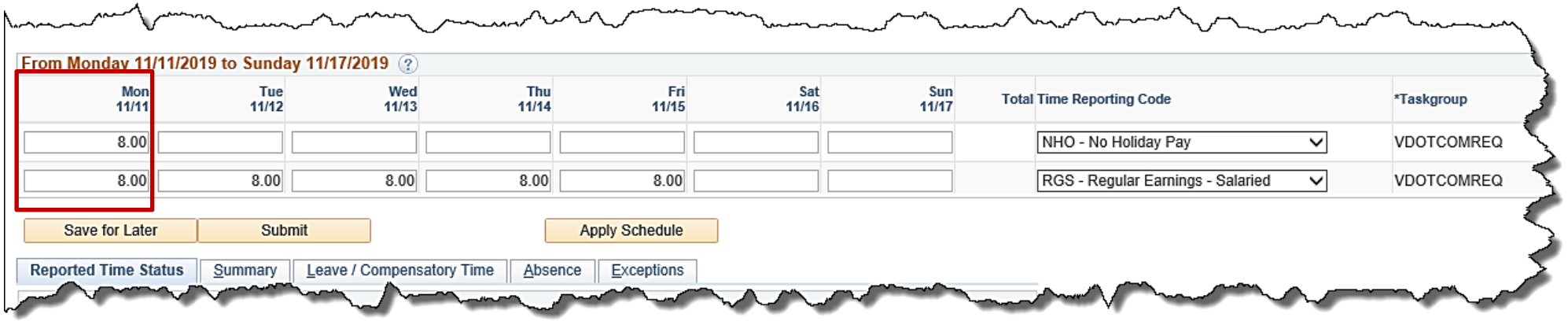
A Floating Holiday is a paid day off from work that substitutes for hours worked on a holiday. Consult your agency policy and supervisor for eligibility.

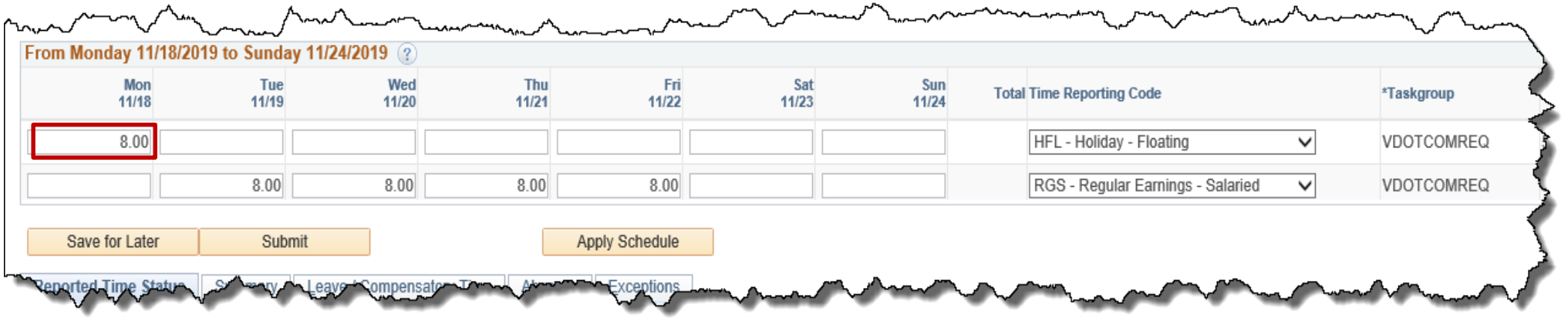
For an eligible employee with a floating holiday, instead of the standard holiday:

- 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.

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.

Using a Floating Holiday (continued)



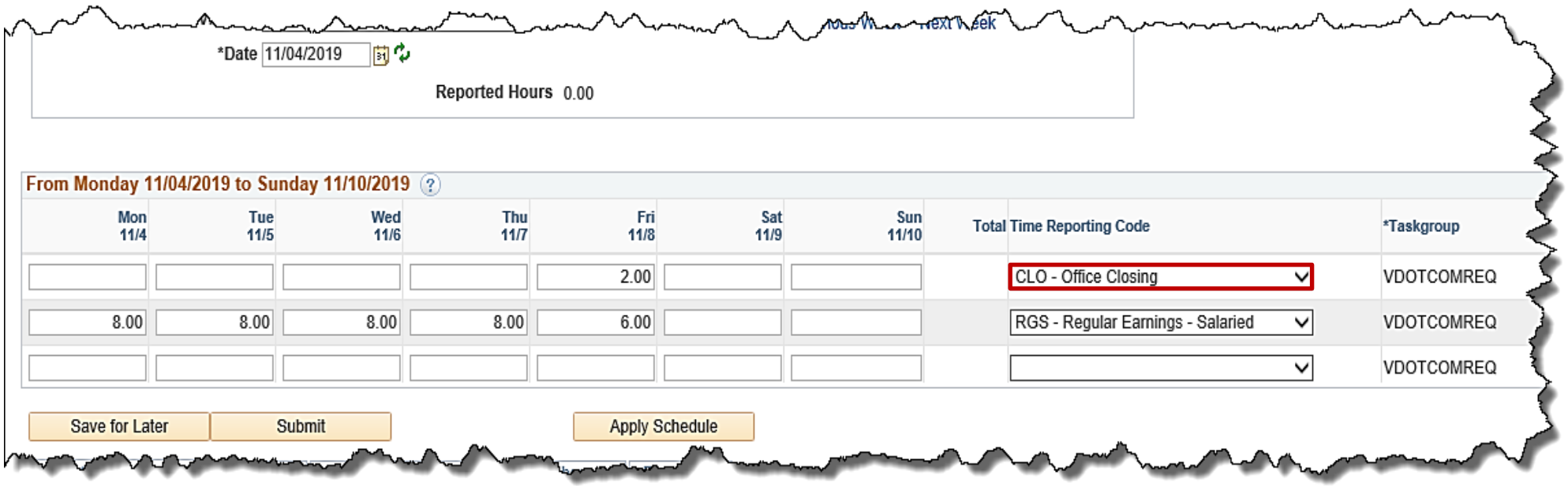


Note: Not every employee is permitted to take floating holidays. Before entering a floating holiday on the timesheet, confirm eligibility with the approver.

Office Closing

Office Closings occur when circumstances require emergency closings such as 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 2: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.

1. Which of the following is not an employee selection criteria?
   a) Employee ID
   b) Last name of employee
   c) Time Reporter Group
   d) ChartField distribution

2. All hours entered on the timesheet are classified by _____.
   a) Telecommute ID
   b) Equipment ID
   c) Chartfields
   d) Time Reporting Codes

3. Every line of reported time entered must have a valid TRC and _____
   a) Charge Distribution
   b) Regular Earnings
   c) Reported time summary
   d) Reported time status

Lesson 2: Checkpoint

4. _____ populate(s) the ChartField distribution. This “shortcut” saves time in that the user does not have to reenter the same information.
   a) Time Reporting Codes
   b) SpeedTypes
   c) ChartField Detail Page
   d) None of the above

5. Time Administration is a batch process that generates_____.
   a) Saved Time
   b) Payable time
   c) Time Reporting Codes
   d) Cardinal HCM

6. 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 _____.
   a) State holidays
   b) The allocation process
   c) FMLA
   d) ChartField updates

Lesson 2: Summary

2 Entering and Viewing Time

In this lesson, you learned:

- Time and Attendance allows Timekeepers to enter time and absence requests for assigned employees.
- You can record compensatory and overtime earned and taken on the timesheet.
- You can view a summary of an employee's compensatory and/or overtime absence balances on the **Timesheet** page by expanding the **Leave and Compensatory Time Balances** section.
- Holidays are populated in **Payable Time** but are not visible on the timesheet

Lesson 3: Introduction

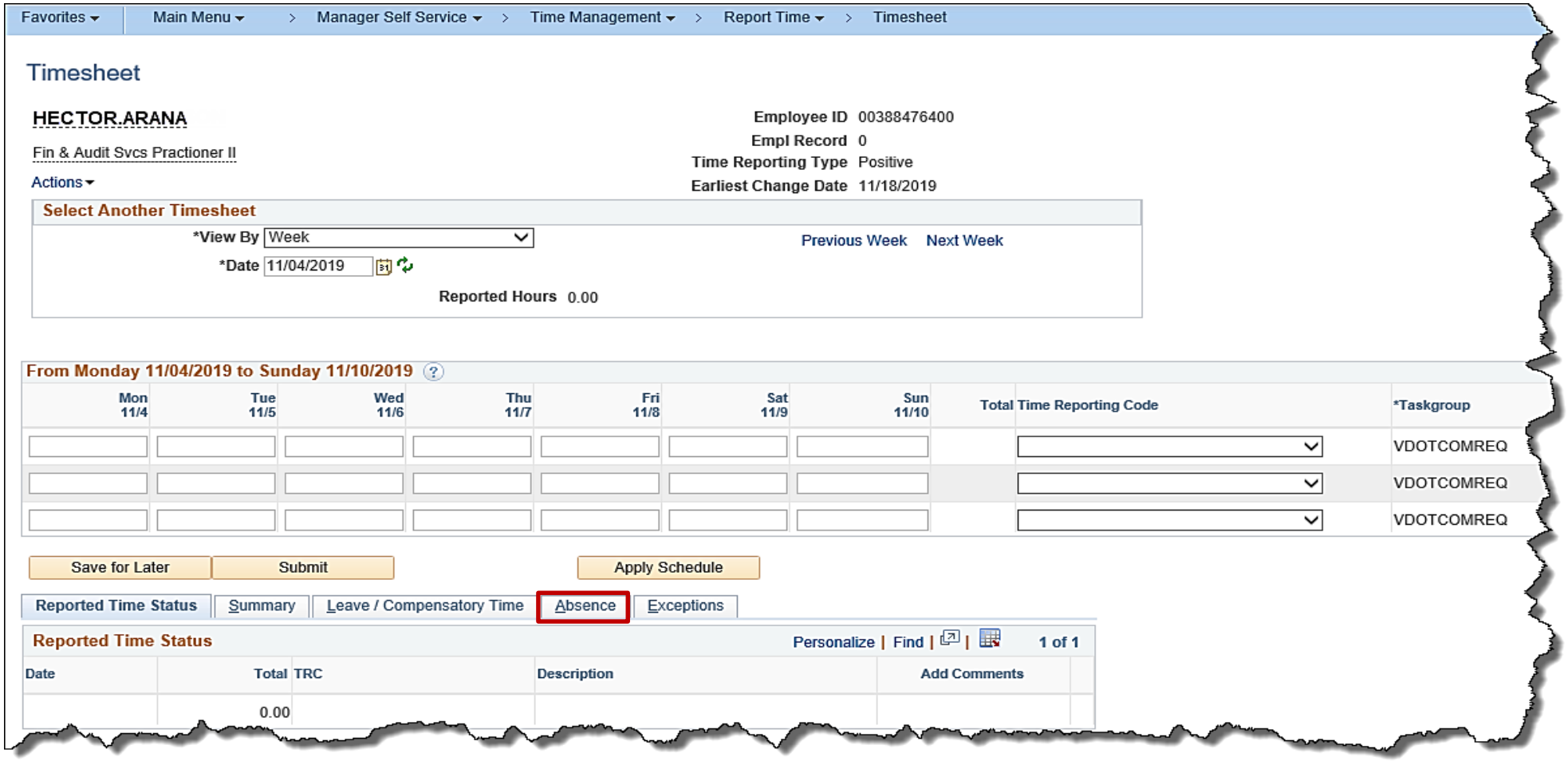
3 Entering and Managing Absences

This lesson covers the following topics:

- Viewing Absence Balances
- Entering Absence Requests on the Timesheet
- Adjusting Absences

Viewing Absence Entitlement Balances

To view an employee's absence entitlement balances, click the **Absence** tab on the **Timesheet** page.



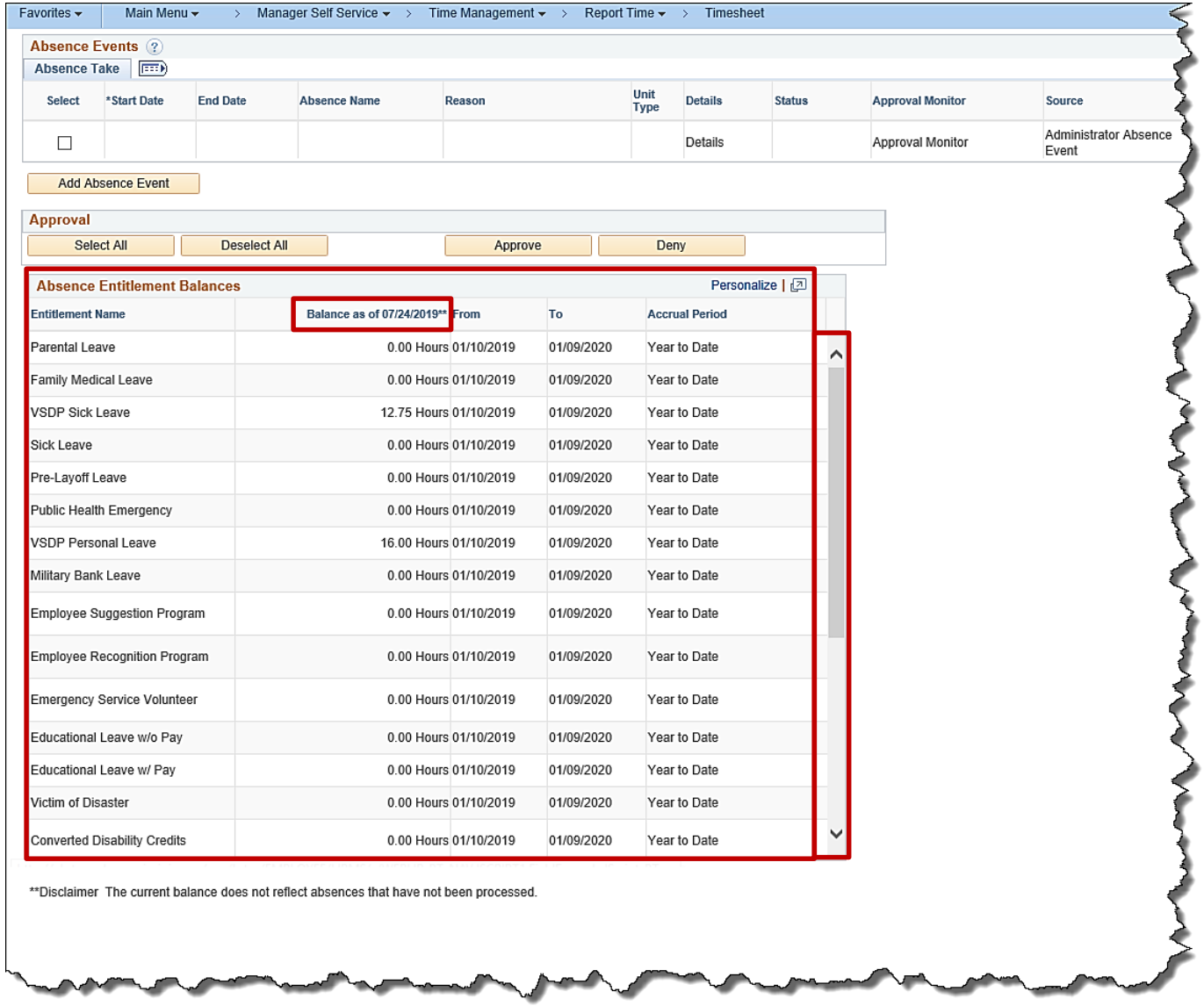
Viewing Absence Entitlement Balances (continued)

The **Absence Events** page displays.

All absence balances are listed with the exception of compensatory time and overtime taken. Use the scroll bar on the right to view additional absence type balances.

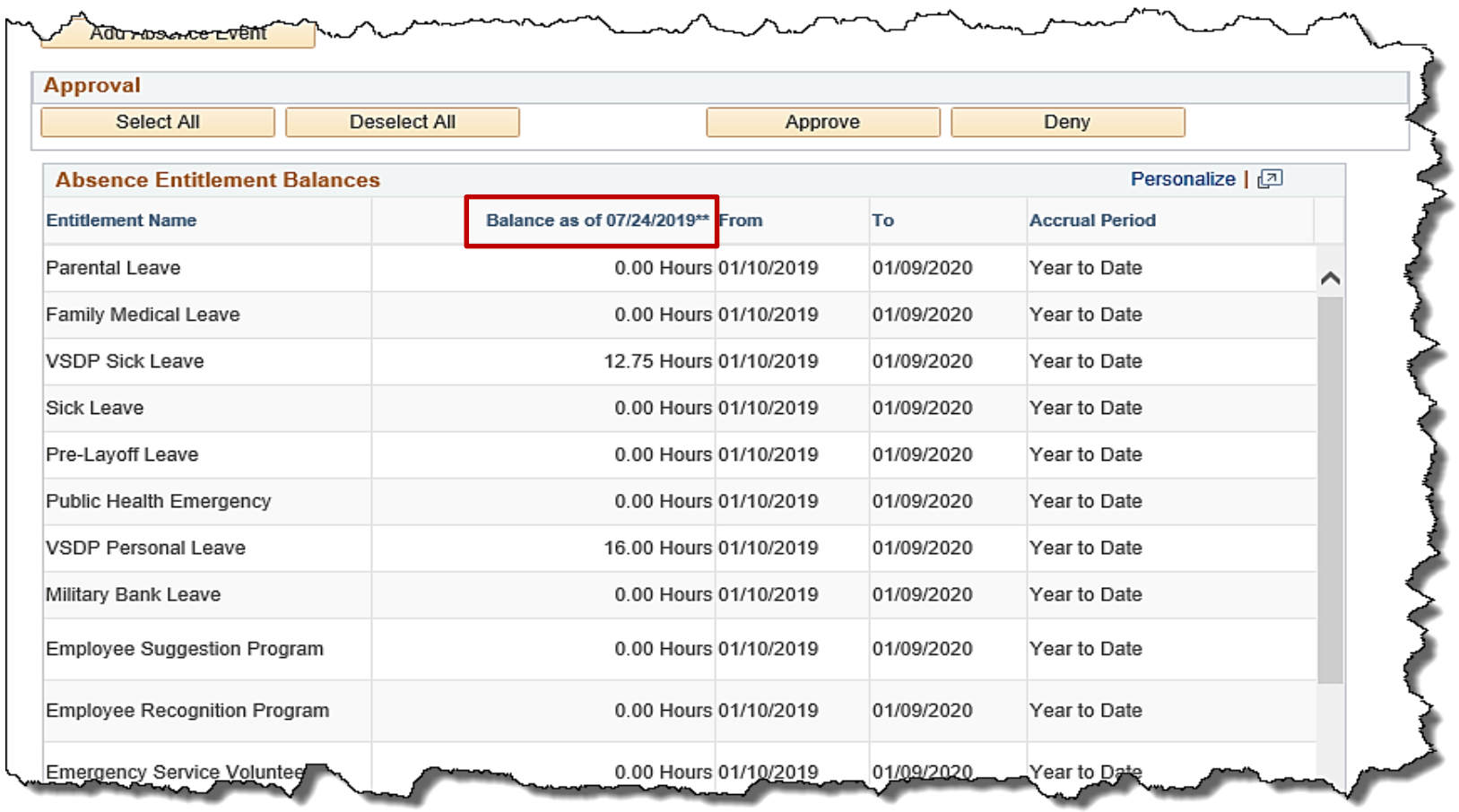
The **Absence Entitlement Balances** section contains a **Balance as of (date)** column. This date indicates the balances in this section as of the date specified, and does not take into account:

- Absences in a **Saved** or **Needs Approval** status
- Future absence requests



Absence Balance Inquiry

Timekeepers can view the absence balances only up to the **Balance as of (date).** If an employee wants to find out what their absence balance will be at a future date, they will need to contact either their supervisor or an Absence Management Administrator to provide that information.



Add Absence Event

Approval

Select All | Deselect All | Approve | Deny

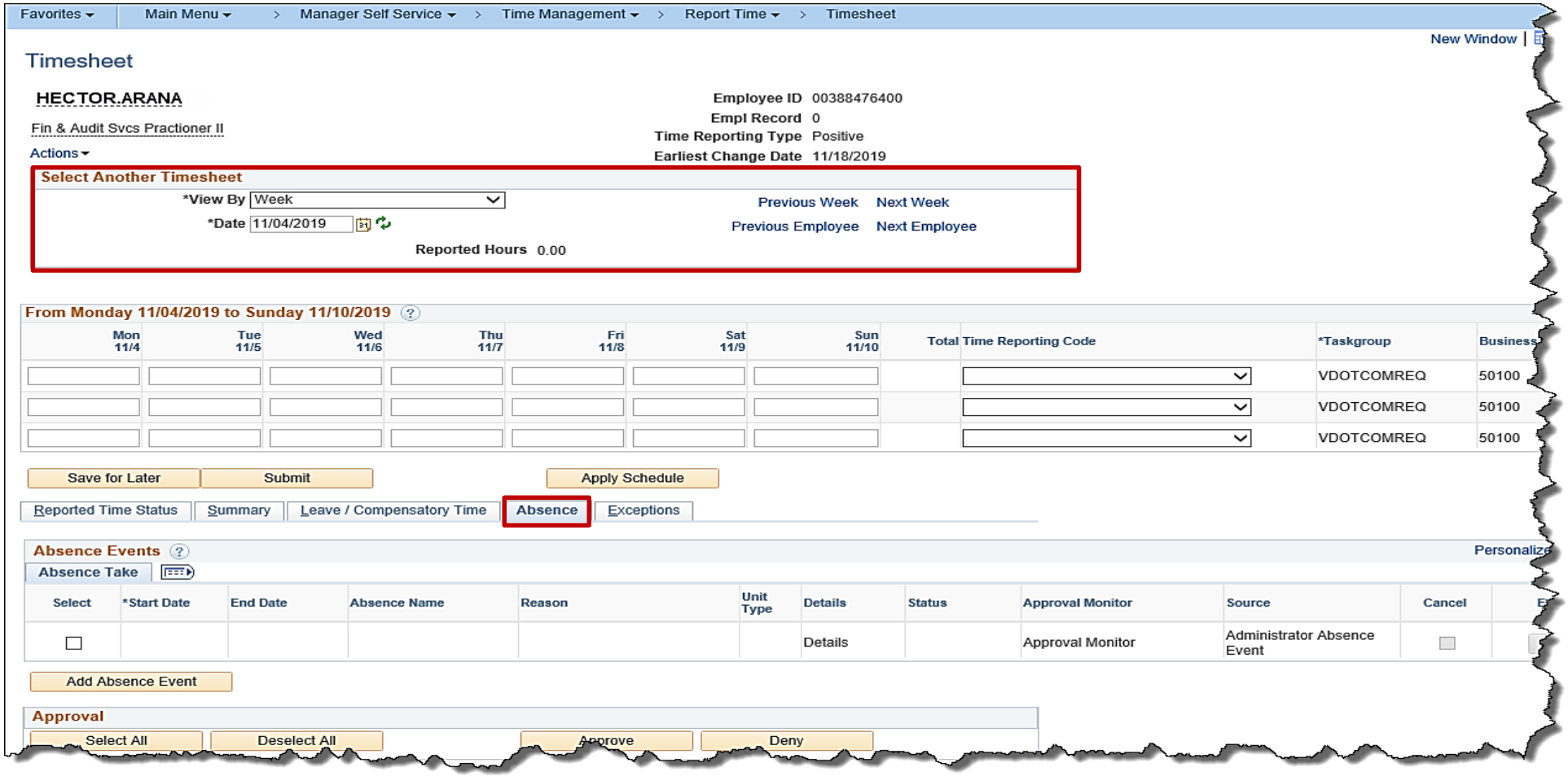
Absence Entitlement Balances — Personalize |

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	12.75 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	16.00 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 Voluntee	0.00 Hours	01/10/2019	01/09/2020	Year to Date

Entering an Absence Request (continued)

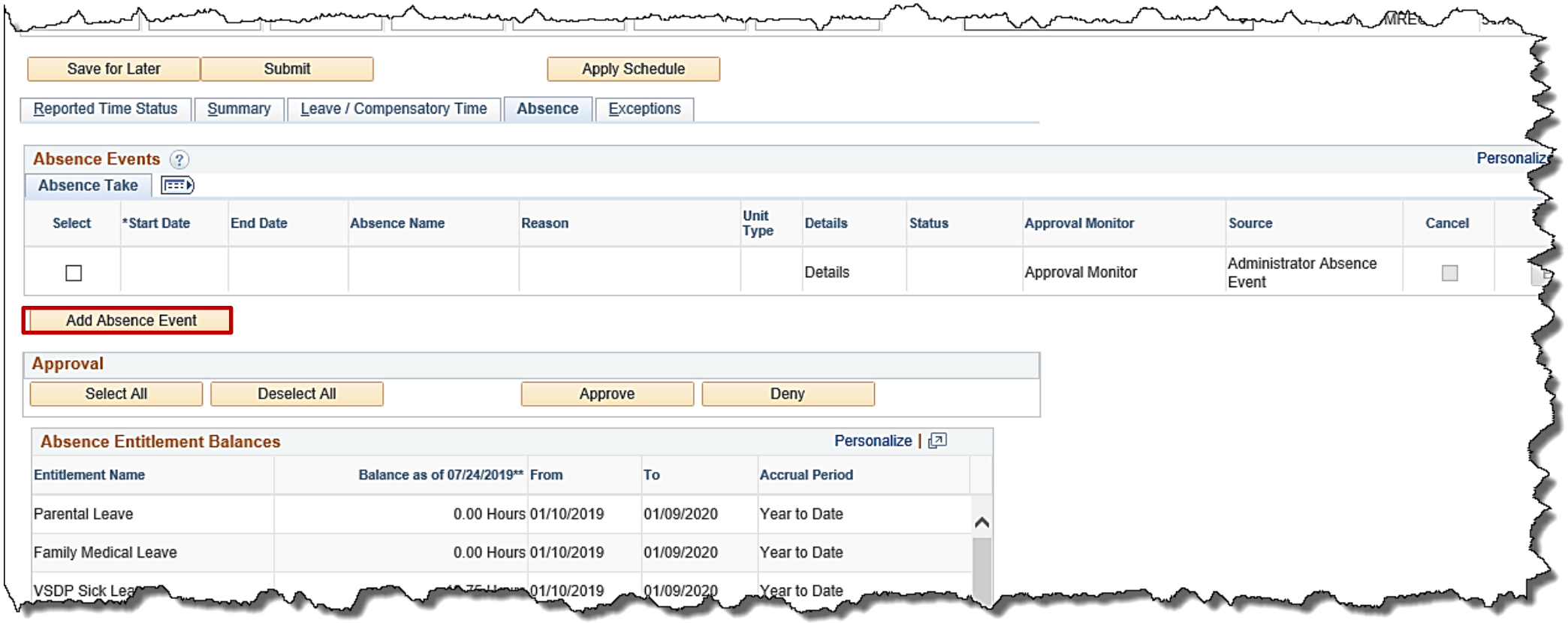
To enter an absence request:

- Enter or select the week that contains the begin date of the leave request.
- Click the **Absence** tab to open **Absence Events** section.



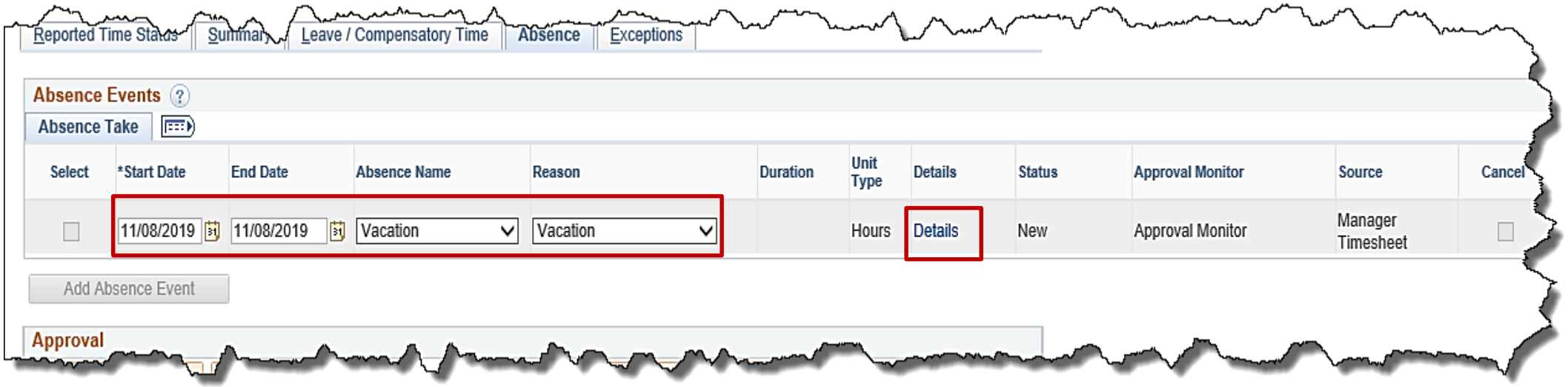
Entering an Absence Request (continued)

- Click the **Add Absence Event**.



Entering an Absence Request (continued)

- Populate the following required fields on the **Absence Take** tab. For this scenario, vacation time will be used:
  - Enter **Start Date**.
  - Enter **End Date**.
  - Select **Absence Name**.
  - Select **Reason**.
  - Click the **Details** link.

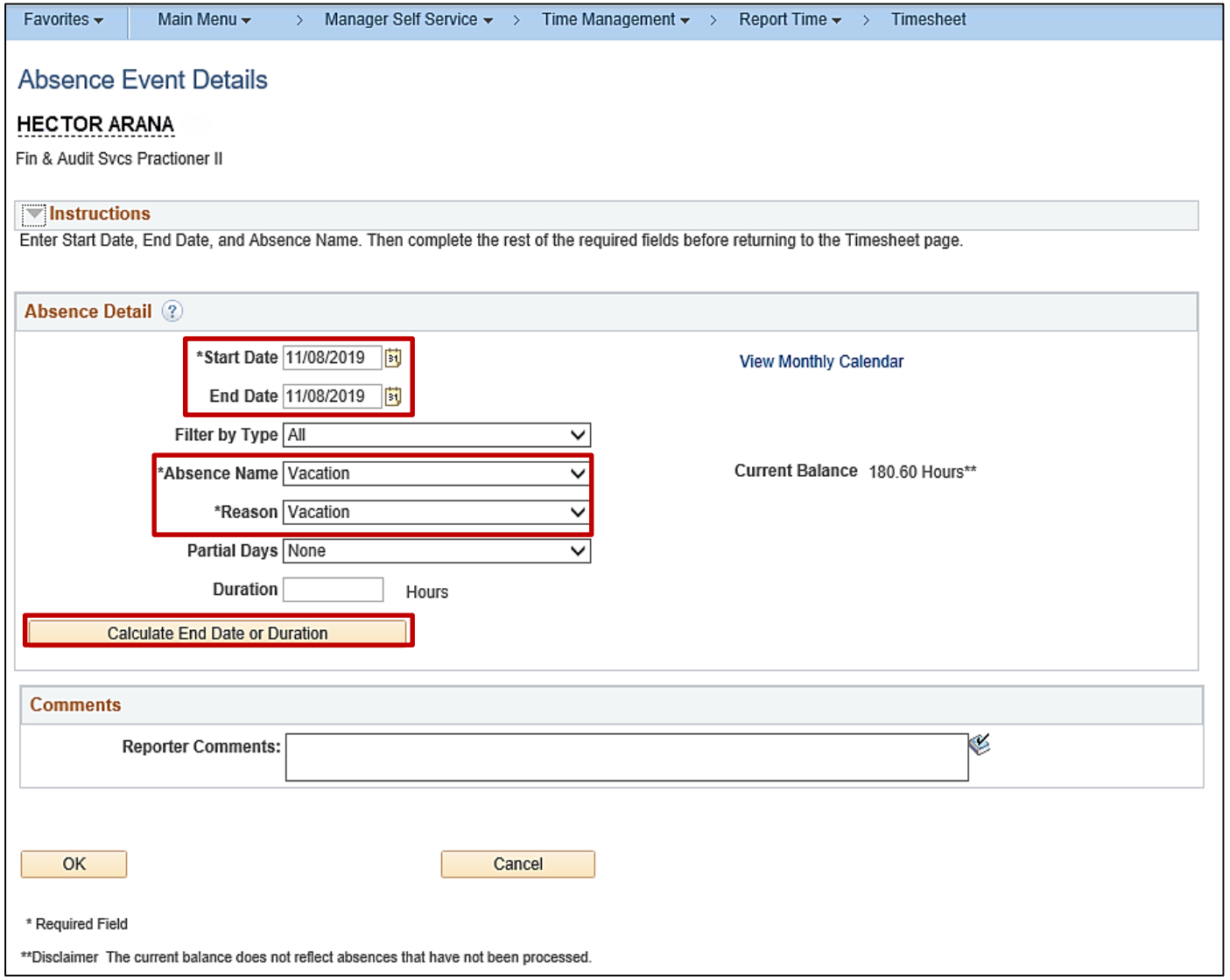


Entering Absence Request (continued)

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 both the employee schedule and the information entered in the **Absence Events Details** page to automatically calculate 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 hours.

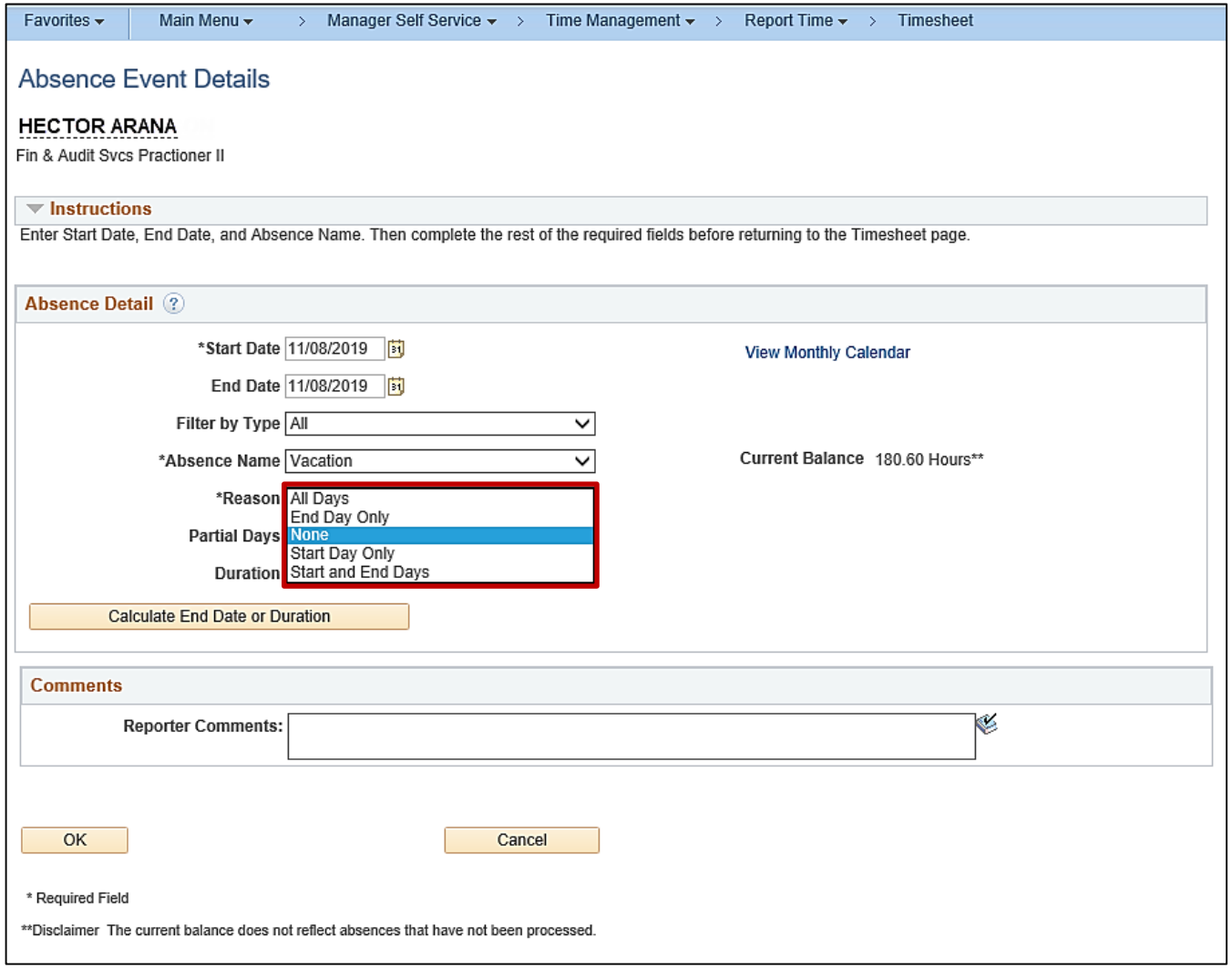


Partial Day Options

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)

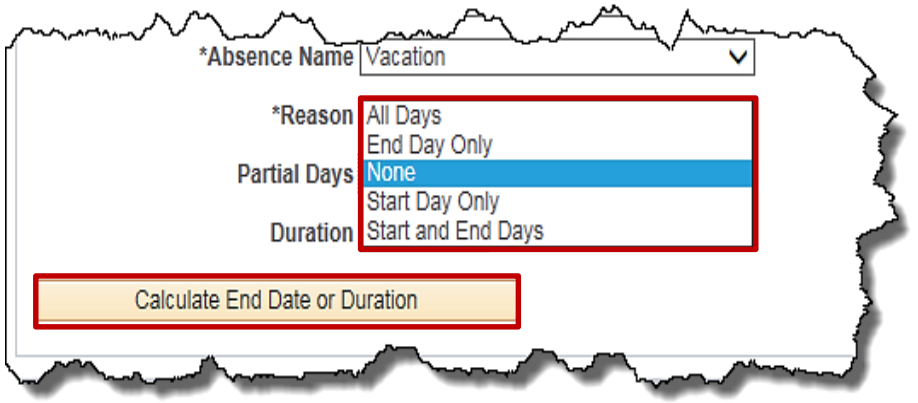
If the absence does not fit any of these options, then more than one request (meeting all the needed absences conditions) will need to be entered.

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

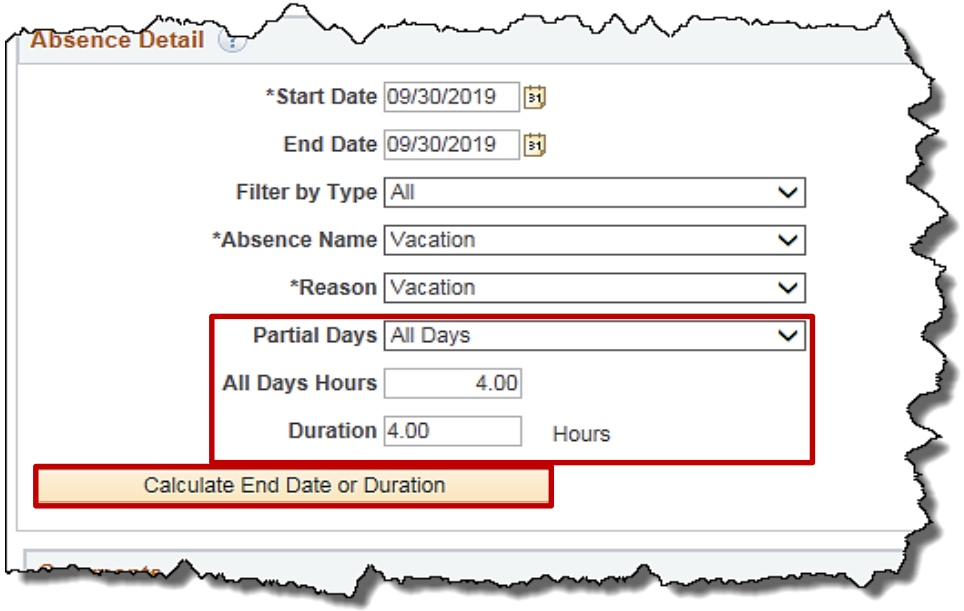
- Request one - Enter the first day as one request (full day).
- Request two - Enter the second day (partial) and third day (full) – using the **Start Day Only** option.

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

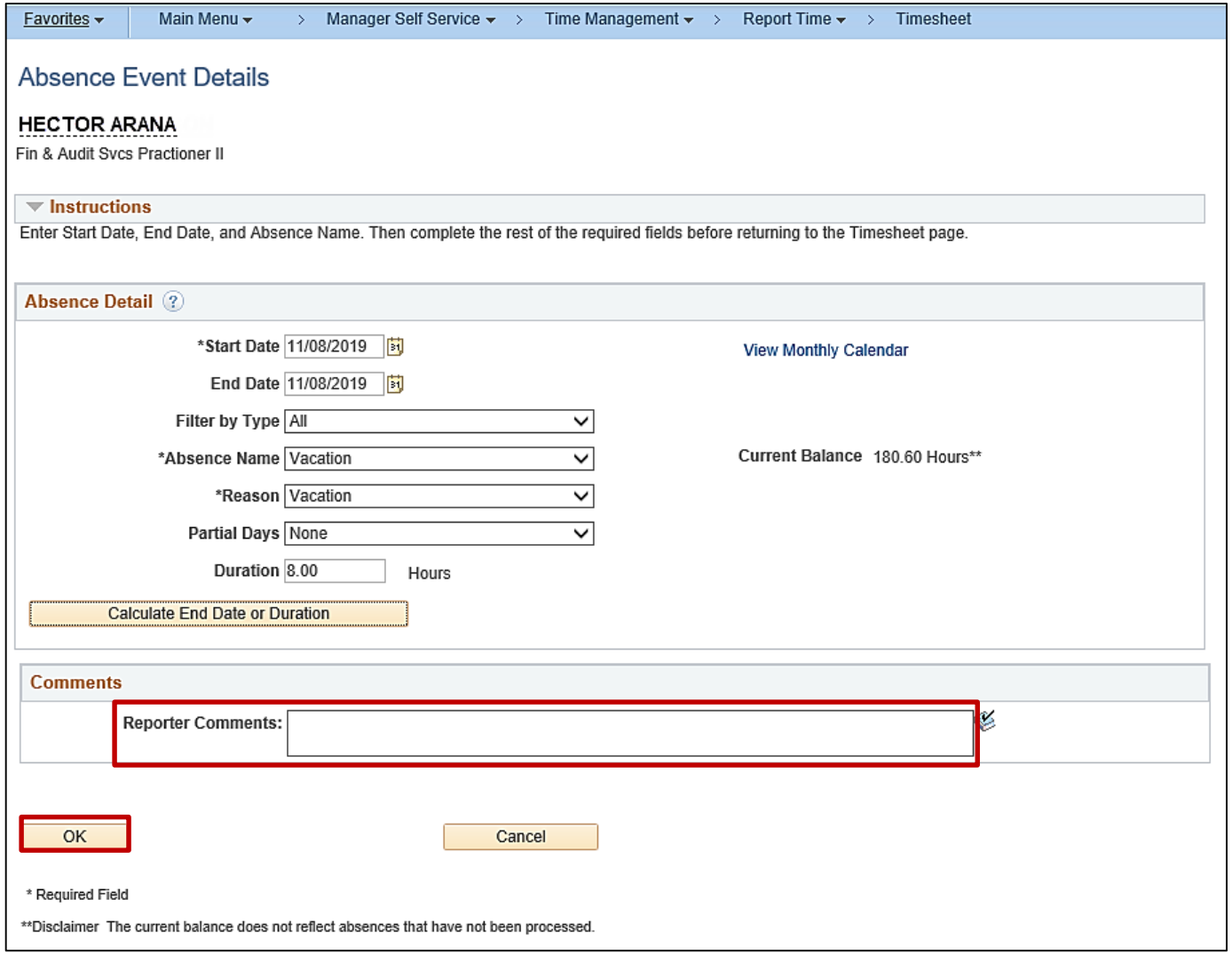


Reporter Comments

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

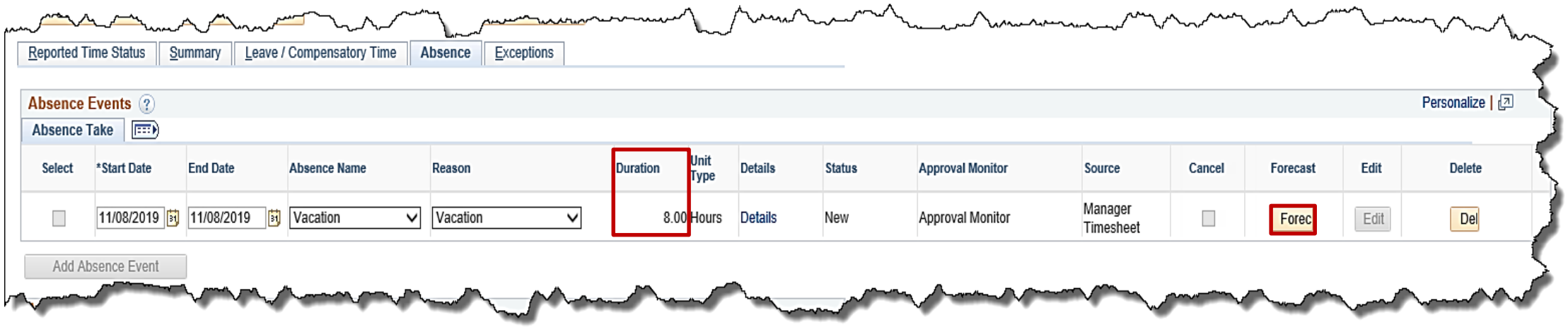
When the **Absence Take** tab returns, the **Duration** field populates with the hours for the absence.

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 the employee 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: November 20,2019 at 11:58

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 05/08 – 05/12 enter the request as follows:

- Request #1: 05/08 – 05/09
  - 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: 05/10 – 05/12
  - 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 six pay periods (i.e. 90 days) into the future and 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 an attempt is made to enter a future absence request which exceeds the 90 days, Cardinal removes the **Add Absence Event** button to prevent absences from being entered outside the 90 day timeframe.

Absences entered and approved in advance based on a forecast of available time can change when intermittent absences are requested and taken for that absence type prior to the future approved week. Be sure to re-check the employee's balance as a safety check to ensure the employee still has 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 Request (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 3 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 you re-check the balances, there are only 16 hours of available personal leave.
- If no action is taken to update the future absence request, the system will process 16 of the 32 hours as leave without pay.
- Monitor future absence requests to ensure balances are sufficient; update leave requests to avoid absences inadvertently processed as leave without pay.

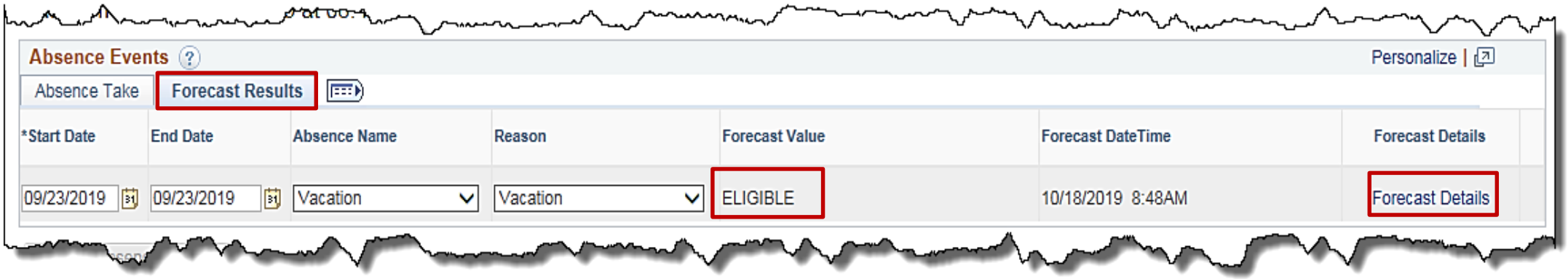
Note: To avoid an employee being on leave without pay, check with your employee and determine what corrective action needs to be taken.

Absence Balance Verification

To verify that there are still sufficient balances for the absence, click on the **Absence** tab and then select the **Forecast Results** tab. Check the **Forecast Value** field 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.

Click on the **Forecast Details** link to view the number of hours expected to be paid, 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 reported in order to obtain advance approval from the approver.

Enter and submit unplanned absences, such as sick leave, when the employee returns to work.

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:

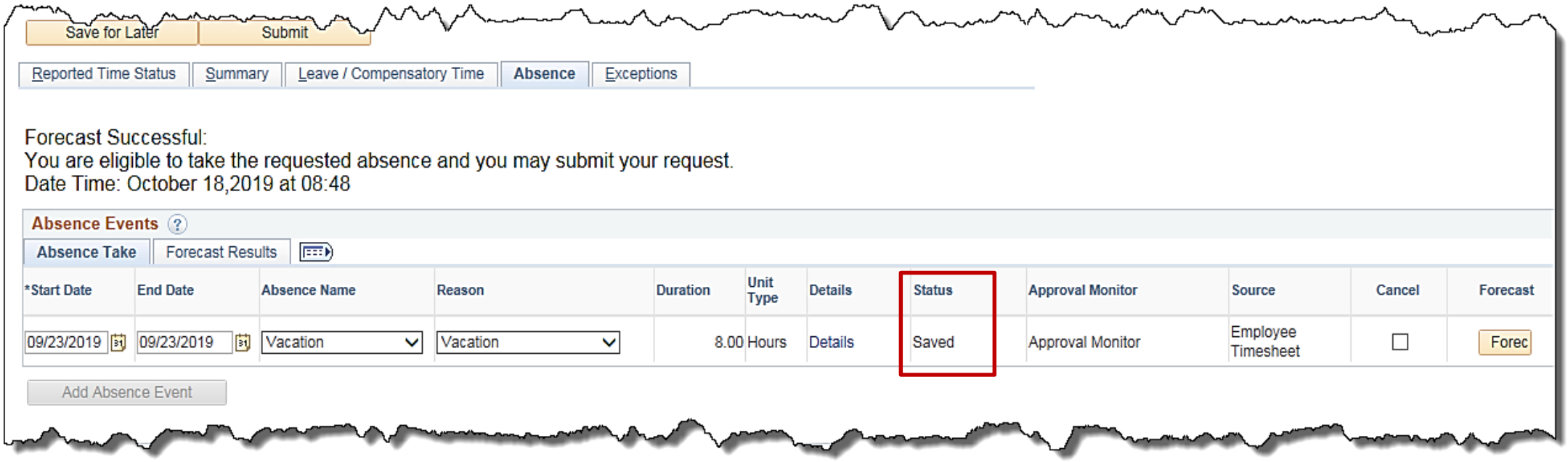
- If the **Edit** button is enabled, click the Edit button to make change or submit. If the Edit button is not enabled (grayed out), then make the change/reforecast directly on the timesheet and submit.
- Make any changes to the request that are needed.
- Click the **Forecast** button (if applicable).
- 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** tab and in the **Absence** tab under the **Status** field.

Cardinal provides notification via email if an absence request is denied by the approver.

If the approver approves or denies the request, the request can be edited. For example, if the employee requested four hours of vacation, but only used two, edit the request and adjust the hours. Be sure to **Submit** it right away.

FMLA, STD, LTD, 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.

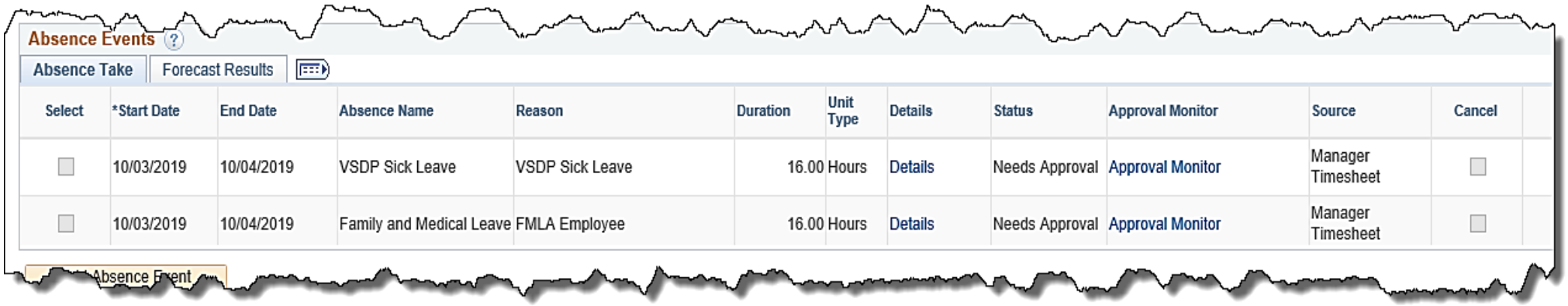
- **STD** (Short Term Disability)/**LTD** (Long Term Disability) - Only the Absence Management Administrator can enter these leave types.

- **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 the first row and select the appropriate **Reason**.
- Enter the absence type being used on the 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).



Note: Timekeepers will typically only be asked to enter FMLA if it is intermittent (i.e., ad hoc doctor's appointments, chemo treatments, etc., related to an approved FMLA request.

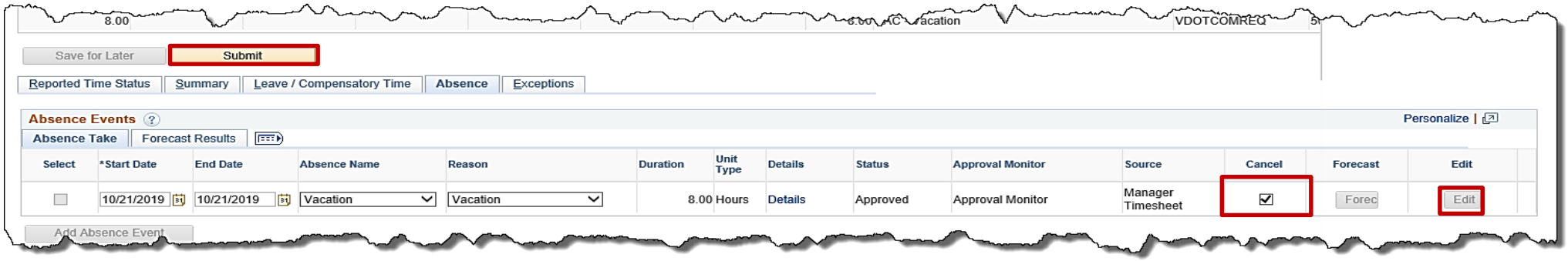
Canceling an Absence Request

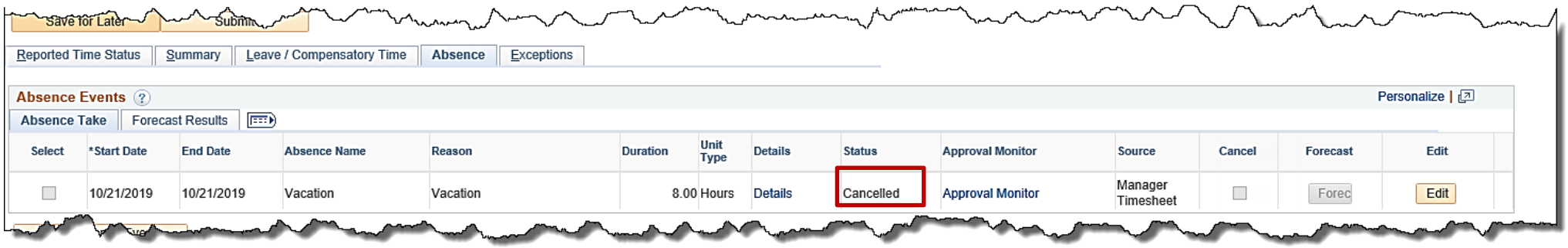
To cancel an absence request:

- Click the **Absence** tab from the Timesheet page.
- Click on the **Edit** button if enabled first and, if not, just check the **Cancel** box.
- Click the **Submit** button immediately.

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

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





Lesson 3: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.

1. You can view absence entitlement balances in the **Absence** section of the **Timesheet** page.

   True or False

2. The absence balances on the Timesheet page are accurate as of the current date.

   True or False

3. Most leave types require forecasting in Cardinal.

   True or False

Lesson 3: Summary

3 Entering and Managing Absences

In this lesson, you learned:

- How to enter absence requests for an individual employee on the **Timesheet** page.
- When the absence request is submitted, it automatically routes for approval and is posted to the employee's timesheet.
- Extended absence types, (e.g., FMLA, WCL, STD, LTD) must be set up by an Absence Management Administrator.
- Timekeepers can view absence balances for the **as of** dates, not real time.

Lesson 4: Introduction

4 Managing Exceptions

This lesson covers the following topics:

- Managing Exceptions

Managing Exceptions

Once the you submit 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.

Timekeepers are responsible for reviewing the status of their employees' time, ensuring that employees and/or approvers are notified of exceptions, and working with them to ensure exceptions are cleared timely.

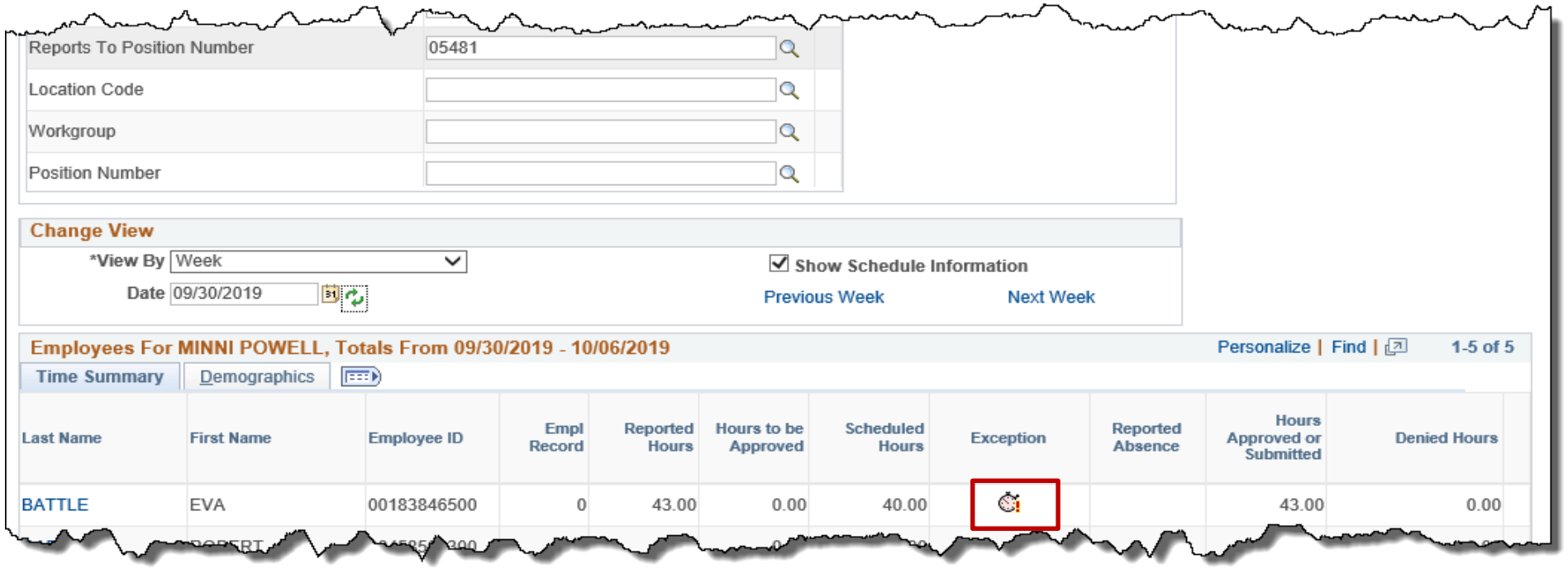
Identifying Employees with Exceptions

Employees with exceptions can be identified from the **Timesheet Summary** page. Access this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Manager Self Service > Time Management > Report Time >Timesheet

Enter the employee information into the search criteria and click the **Get Employees** button.

The employees who match the criteria are displayed. **Alarm clock** icons flag any exceptions.

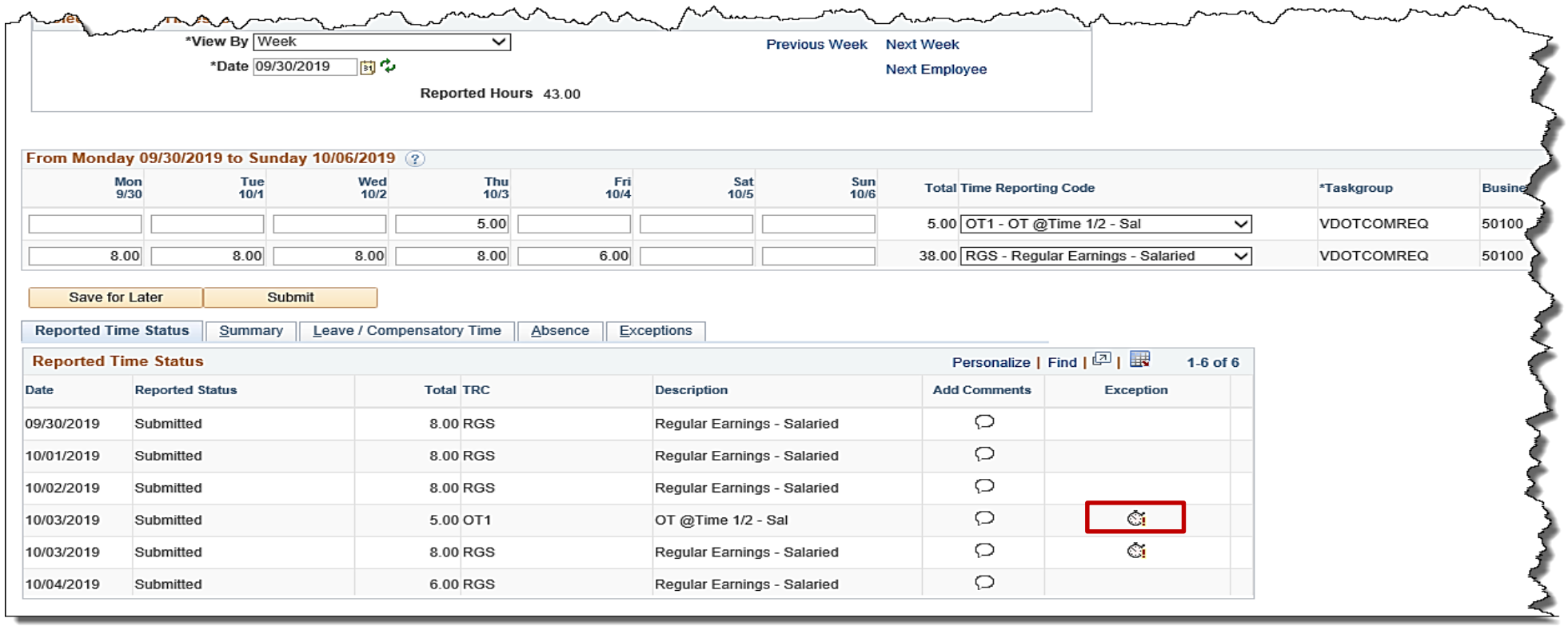


Viewing Exceptions

View an Exception from the **Reported Time Status** tab or from the **Exceptions** tab.

To view the exception details:

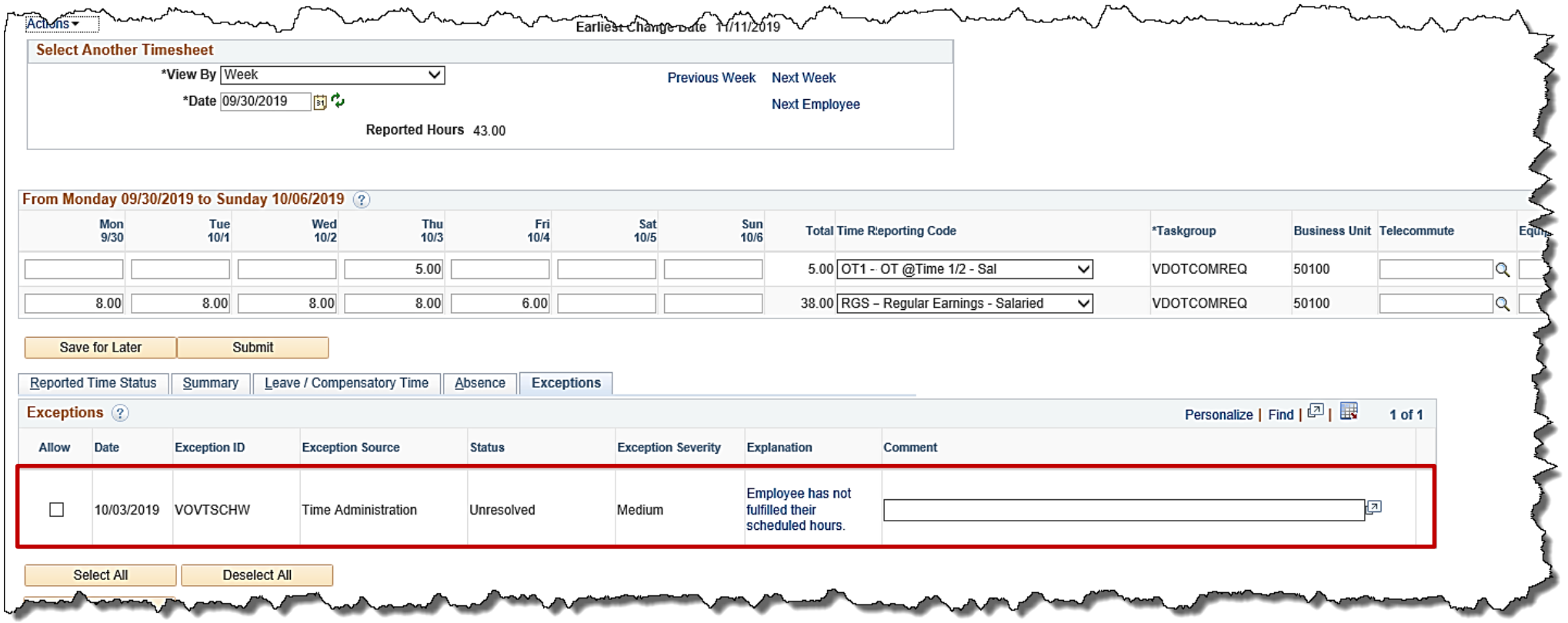
- Select the employee who has an exception by clicking on the employee link.
- Open the **Reported Time Status** section on the timesheet.
- Click the **alarm clock** icon to open the **Exceptions** page.



Correcting Exceptions

Review the details for an exception on the **Details** tab.

For more detailed information about exceptions and how to resolve them, see the job aid entitled **501 TA: Exceptions** located on the Cardinal website in **Job Aids** under **Training**. Remember, not all Exceptions have to be cleared. A comment associated with an Exception can be added.



Lesson 4: Summary

4 Managing Exceptions

In this lesson, you learned:

- Time must be submitted to be processed by Time Administration.
- Payable time is sent to the employee's supervisor for approval.
- Check the Reported Time Status the day after time is submitted to check for exceptions.
- Exceptions are flagged with an **alarm clock** icon in the exceptions column on the **Timesheet Summary** page.
- When an exception is corrected, resubmit the time to be reprocessed by Time Administration.

Lesson 5: Introduction

5 Performing Timesheet Adjustments

This lesson covers the following topics:

- Performing Timesheet Adjustments

Adjusting the Timesheet

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
- Adjusting an absence request

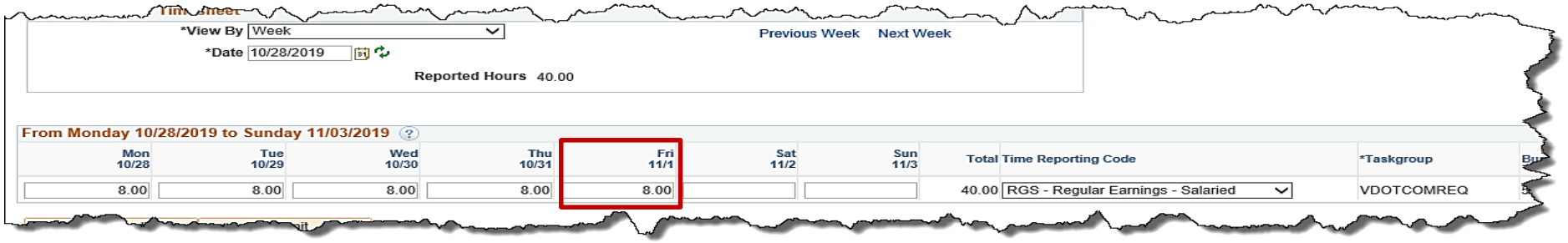
Timesheet adjustments may be entered up to six pay periods in the past and not prior to the beginning of the current fiscal year. If adjustments are needed for a period prior to those limits, contact your administrator.

Making Adjustments to the Timesheet

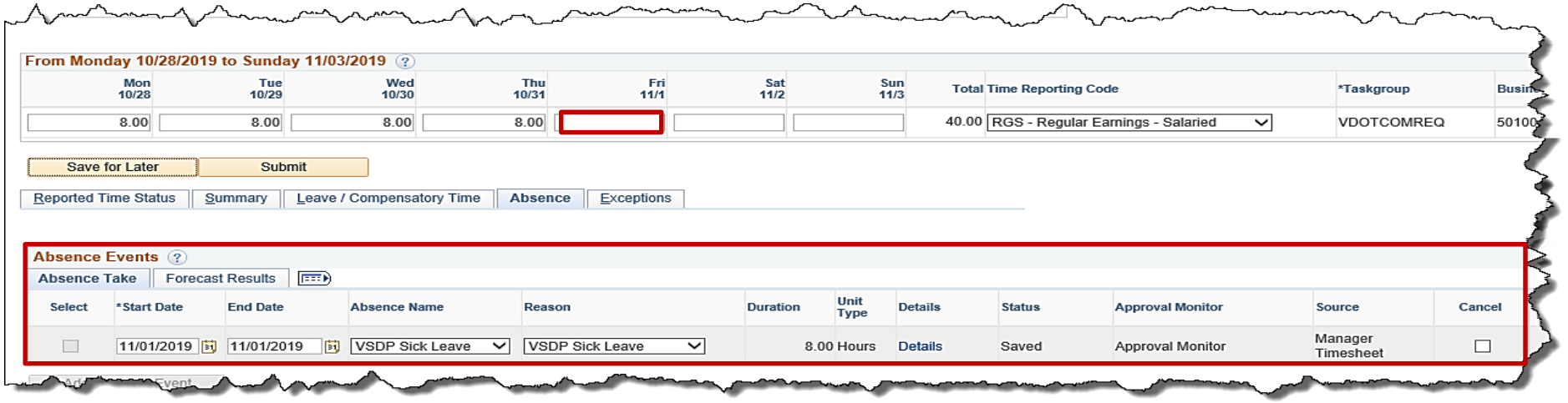
If an absence request is added after time has been submitted, go back to the timesheet and adjust the time entered for that day. Cardinal does not automatically make these adjustments.

For example:

- Eight hours of regular time was entered on Friday. The employee was out sick on Friday.



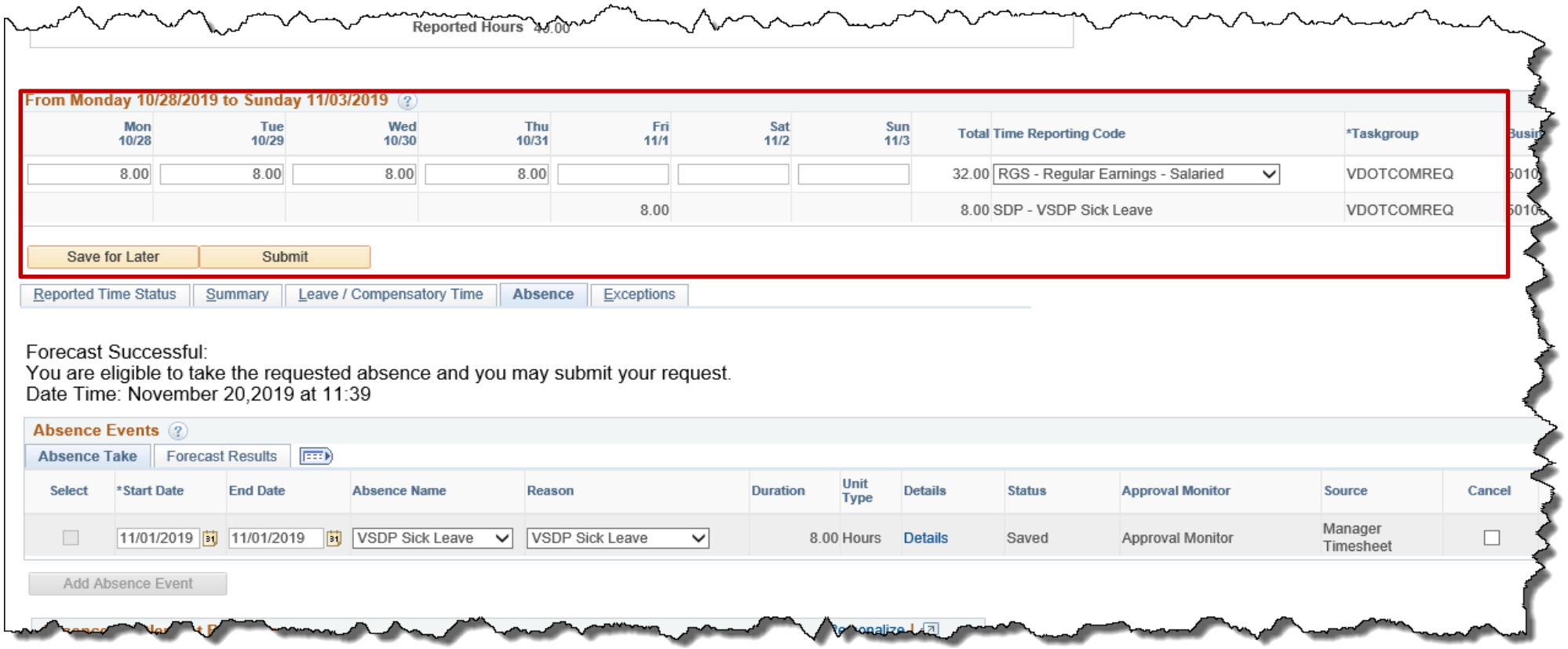
- Enter the leave request for Friday for the 8 hours of sick time, and make sure the 8 RGS reported Friday are deleted on the submitted timesheet.



Making Adjustments to the Timesheet (Continued)

Be sure when adjusting previously submitted time, all steps are completed, e.g., forecasting the absence event.

When Time Administration runs, it removes the 8 hours of RGS and processes the Absence event. If already approved, the timesheet will offset (generate negative hours). If not already approved and still in a not approved status, Time Administration will simply delete the 8 RGS from payable time.



Making Adjustments to the Timesheet (continued)

Please note that although negative hours are never entered on the Timesheet page in Cardinal (the system will not allow this), negative hours may be seen on the Payable Time Detail page that are system generated. View the Approval Status of payable time (hours entered in the timesheet grid) on the Payable Time Detail page.

When an adjustment is made to the timesheet that reverses out time, after it has been approved, Cardinal processes the adjustment and displays the reversal as negative hours on the Payable Time Detail page. Reversal as negative hours will occur even if the hours are the same yet the charge distribution was incorrect for those hours.

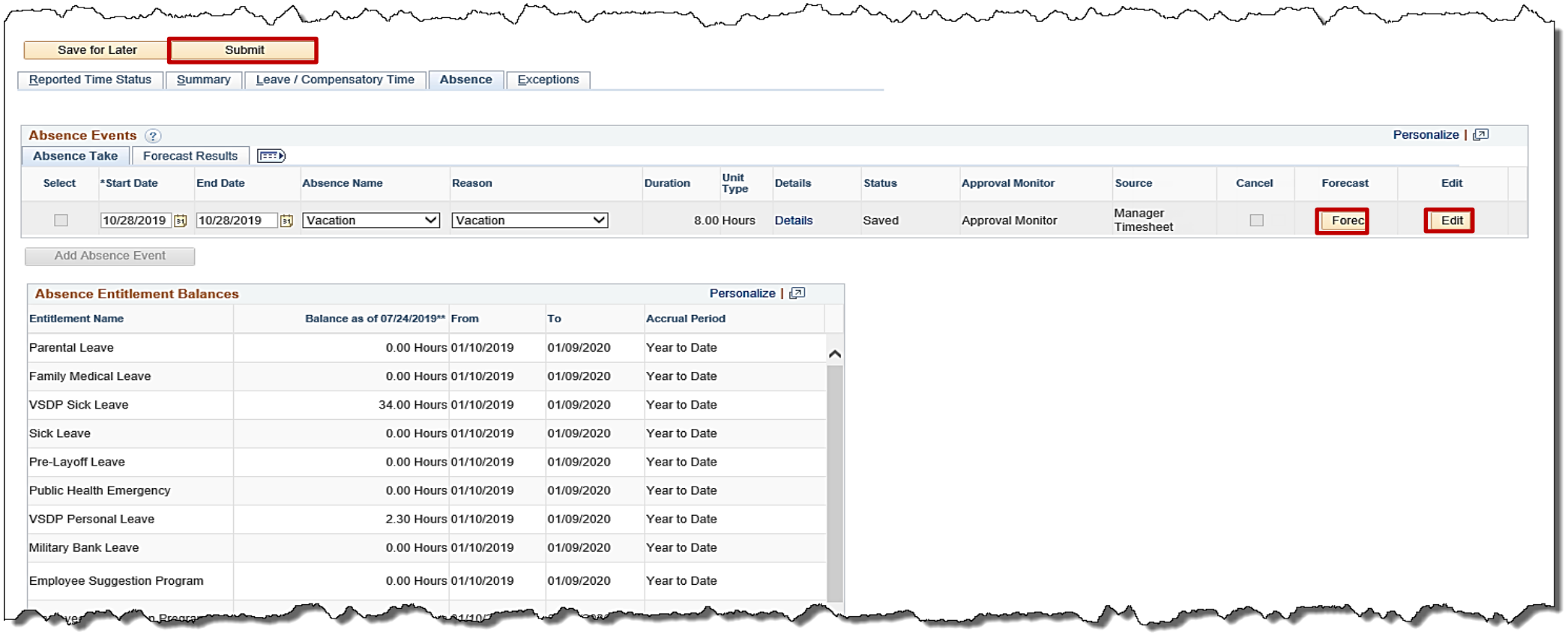
For example:

- An employee entered 8 hours of time for a particular charge distribution.
- The supervisor approves the time.
- The employee makes an adjustment to the charge distribution after the approval.
- Cardinal would generate a **- 8** entry on the **Payable Time Detail** page. This negative offset removes the 8 hours charged to the original ChartField distribution.

Making Adjustments to an Absence Request

To change the absence request:

- Click the **Edit** button for the request to be changed.
- Make the necessary adjustments (change absence type or duration).
- Click the **Forecast** button.
- Click the **Submit** button immediately.



Lesson 5: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.

1. If and absence is added after time has been submitted, Cardinal will automatically adjust the time entered for that day.

   True or False

2. Cardinal allows for the input of negative hours.

   True or False

3. Cardinal may generate negative hours..

   True or False

Lesson 5: Checkpoint (continued)

4. If an absence request needs to be adjusted, you must click the Edit button first if it is enabled.

   True or False

5. Which of the following is a reason for adjusting the timesheet?
   a) Correcting an error identified by Time Administration
   b) Correcting a TRC
   c) Changing a charge distribution
   d) All of the above

Lesson 5: Summary

5 Performing Timesheet Adjustments

In this lesson, you learned:

- To adjust the hours on an employee's timesheet, input the updated values (hours, TRC, or charge distribution) and submit again.
- Planned absences that are not taken can be cancelled.
- Do not enter negative hours to back out time that has already been reported.
- After a correction is made and submitted again, Time Administration replaces the original time reported with the adjusted time and validates.
- Cardinal generates negative entries on the **Payable Time Detail** page when time adjustments occur after they were approved by the supervisor

Lesson 6: Introduction

6 Timekeeper Processing Hands-On Practice

This lesson covers the following topics:

- Timekeeper Hands-On Practice

Lesson 6: Timekeeper Processing Hands-On Practice

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Course Summary

TA364 Time and Attendance Timekeeper Processing

In this course, you learned:

- Understand key concepts related to Time and Attendance
- Enter time worked
- Enter absence requests
- Make timesheet adjustments
- Manage timesheet exceptions

Course Evaluation

Congratulations! You successfully completed the **501 TA364: Time and Attendance Timekeeper Processing** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.

Appendix

- Key Terms
- Flowchart Key

Key Terms: General

Manager Self Service: The entry and approval of time and absence requests on behalf of other employees.

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

Timesheet Page - The page in Cardinal where users:

- Enter and submit productive time and absence requests
- View compensatory and overtime balances
- View absence entitlement balances
- Forecast and submit absence requests

Time Reporter Group: The Time Reporter Group is one of the selection criteria on the Timesheet Summary page. There are three Task Reporter Groups for VDOT:

- **VDOTALL -** All active VDOT employees
- **VDOTHRL -** All active VDOT hourly employees
- **VDOTSAL -** All active VDOT salaried employees

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

Key Terms: General (continued)

Workgroup: A group of Time Reporters who share the same time reporting requirements. The workgroup determines the Time Reporting Rules and Time Reporting Codes that apply to an employee. All Time Reporters must be associated with a valid workgroup.

For VDOT, the Workgroups are as follows:

- **VAEXCEPT** – VDOT Executives – No Approval
- **VAPEXTPB4** – VDOT EXTPB4 – No Approval
- **VAPEXTPB5** – VDOT EXTPB5 – No Approval
- **VDOTEMHRLY** – VDOT Emergency Hourly
- **VDOTEXCEPT** – VDOT Executives only
- **VDOTEXPTB4** – Salaried Exempt Pay Band 4
- **VDOTEXTPB5** – Sal Exempt Pay Band 5 & above
- **VDOTHRLY** – VDOT Hourly Employees
- **VDOTNOEXOT** – VDOT Salaried Non Exempt OT Lv
- **VDOTNONEXM** – VDOT Salaried Non Exempt

Key Terms: Timesheet Entry

Taskgroup: Grouping of employees with similar task reporting requirements (e.g., for VDOT ChartFields are required). **VDOTCOMREQ** is the default for this field and it cannot be changed.

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

ChartFields: Identify how time is charged.

Compensatory Time: Identifies additional hours an employee works in a workweek, that can be taken as paid time off within 12 month's from the date it is worked.

SpeedTypes: Automatically populate some ChartFields on a transaction. Additional fields (e.g., Department, Activity) must 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 Time Earned (CPE), etc.

Key Terms: Absence Management

Absence Entitlement: The hours or days a salaried 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 type of absence, e.g., Vacation, Civil Leave, Compensatory Time Taken, 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 Absence (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 absence entitlements, 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, e.g., Vacation, VSDP Sick, VSDP Personal.

Key Terms: Timesheet Processing

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 for eligibility.

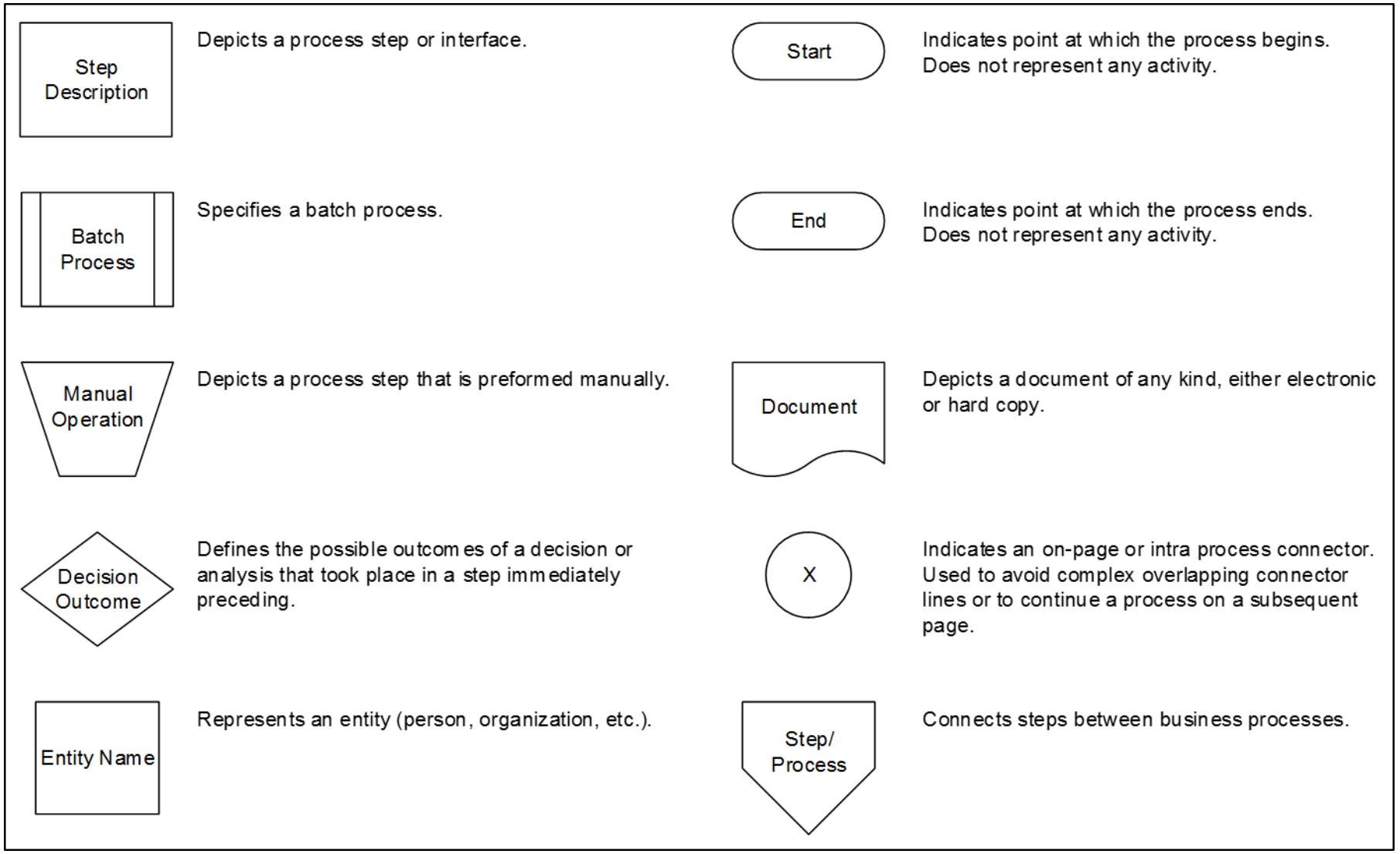
Lockout: A period of time that a user is temporarily prevented from making prior period adjustments on timesheets. This is normally at the close of the pay period when timesheets are due.

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

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

Submitted Time: Time that has been submitted for processing by 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. For example, "Scheduled overtime for salaried nonexempt employees cannot be reported unless 40 productive hours have been worked in the work week."

Flowchart Key