

About the Leave Donation Process

The Leave Donation Process in Cardinal does not allow employees to enter leave donation requests directly. Employees who wish to donate leave to another employee should follow agency policy and procedures.

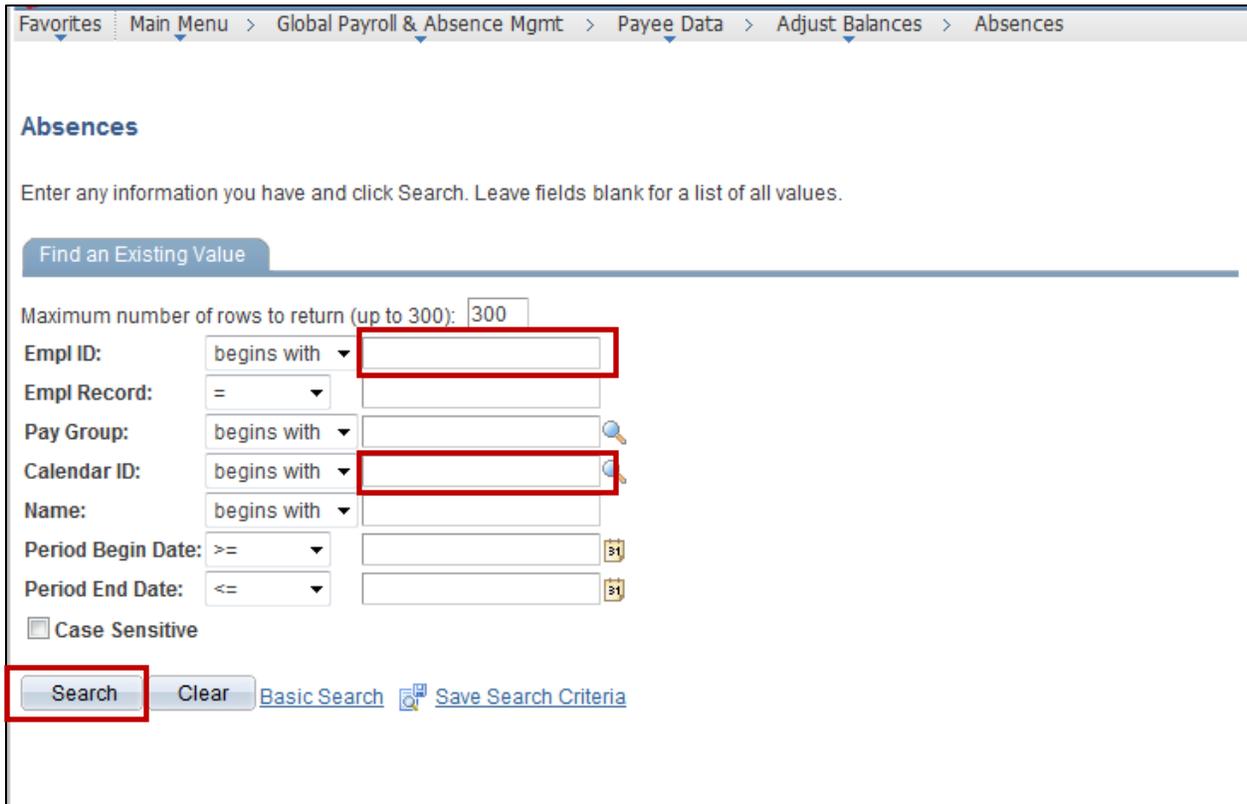
Use the Adjust Absences pages to manually create the appropriate balance adjustments for the donor and recipient (similar to the way you make balance adjustments for other leave types) for both leave donations and the return of unused donated leave. The Donated Leave Usage Report (V_TA_DONATED_LEAVE) can be used to help determine unused leave that should be returned. Instructions for returning unused leave begin on page 5.

Entering Leave Donation Adjustments

- 1 Navigate to the **Absences** page using the following path:

Cardinal FIN > Cardinal HCM > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

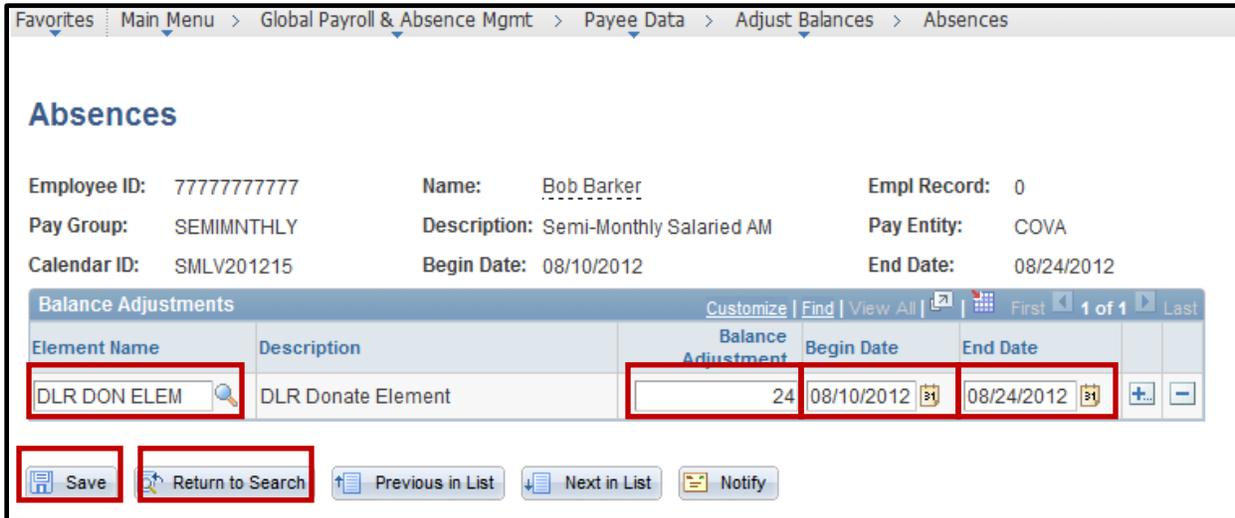
- 2 The **Absences** Search page displays.



- 3 Enter the donor's **Empl ID** number

Leave Donation Process

- 4 Choose the **Calendar ID** for the pay period the balance adjustments should occur. This is the period the leave is to become available to the recipient.
- 5 Click the **Search** button.
- 6 The **Absences** page displays for the selected person



Favorites | Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Employee ID: 7777777777 Name: Bob Barker Empl Record: 0
Pay Group: SEMIMNTHLY Description: Semi-Monthly Salaried AM Pay Entity: COVA
Calendar ID: SMLV201215 Begin Date: 08/10/2012 End Date: 08/24/2012

| Element Name | Description | Balance Adjustment | Begin Date | End Date | | |
|--------------|--------------------|--------------------|------------|------------|---|---|
| DLR DON ELEM | DLR Donate Element | 24 | 08/10/2012 | 08/24/2012 | + | - |

Save Return to Search Previous in List Next in List Notify

- 7 In the **Element Name** field, select *DLR DON ELEM*.
- 8 In the **Balance Adjustment** field, enter the positive amount of leave that should be donated by the donor. For this scenario it is **24**.
- 9 The **Begin Date** and **End Date** will prefill based on the calendar selected. These prefill after you select the **Element Name**. Delete those prefilled dates out of both fields.
- 10 Click the **Save** button.
- 11 In this scenario, the adjustment was made for the donor, now the adjustment must be made for the recipient. Click the **Return to Search** button.
- 12 The **Absence** search page displays.

Favorites | Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300):

Empl ID:

Empl Record:

Pay Group: 

Calendar ID: 

Name:

Period Begin Date: 

Period End Date: 

Case Sensitive

[Basic Search](#)  [Save Search Criteria](#)

- 13 Enter the **Empl ID** of the recipient.
- 14 Choose the **Calendar ID** for the pay period the balance adjustments should occur. This is the period the leave is to become available to the recipient. This should match what you input for the leave donor.
- 15 Click the **Search** button.
- 16 The **Absences** page displays.

Favorites | Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Employee ID: 00000997000 Name: Paris Parkway Empl Record: 0
 Pay Group: SEMIMNTHLY Description: Semi-Monthly Salaried AM Pay Entity: COVA
 Calendar ID: SMLV201215 Begin Date: 08/10/2012 End Date: 08/24/2012

This Calendar is finalized. Any changes will be considered during retro processing.

| Balance Adjustments | | | | |
|---------------------|---------------------|--------------------|------------|----------|
| Element Name | Description | Balance Adjustment | Begin Date | End Date |
| DLR REC ELEM | DLR Receive Element | 24 | | |

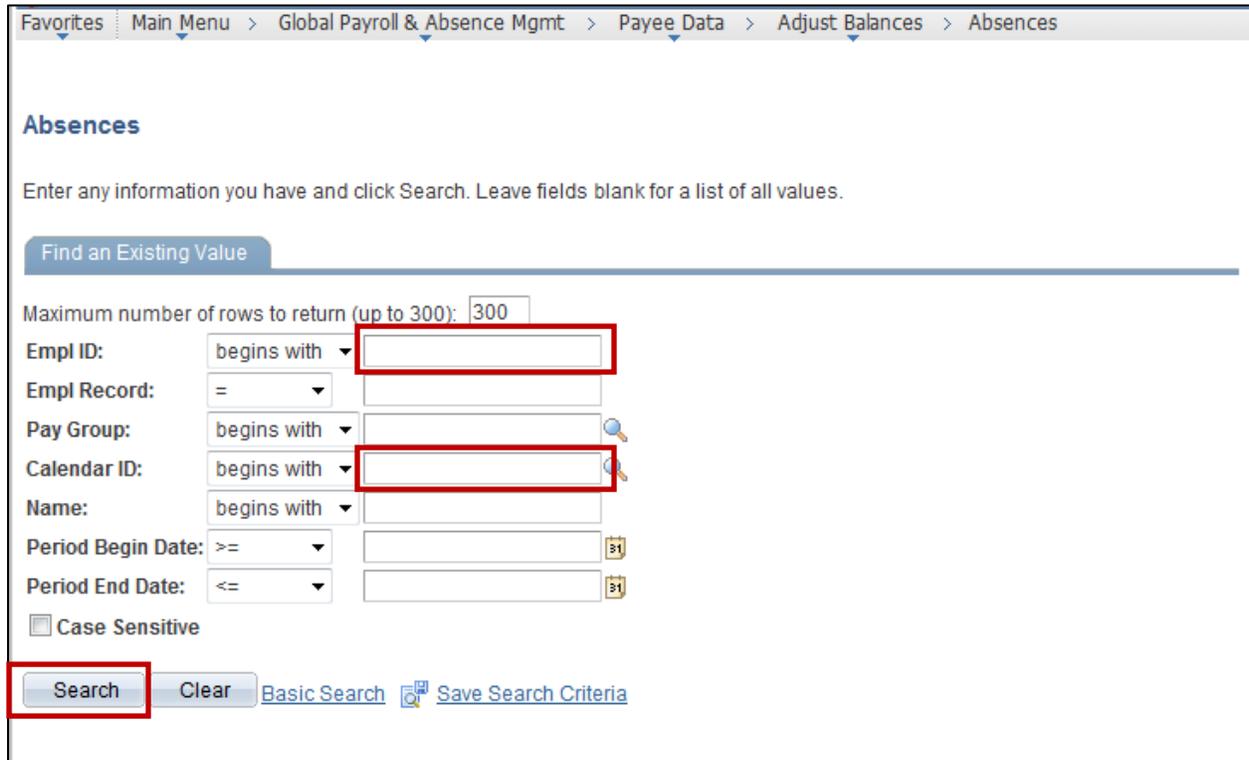
Save Return to Search Notify

- 17 To adjust the recipient's time, select *DLR REC ELEM* for the **Element Name**.
- 18 For **Balance Adjustment**, enter the hours as a positive number to increase the balance. In this scenario, **24**.
- 19 Delete the dates that prefill in the **Begin Date** and **End Date** fields.
- 20 Click the **Save** button.
- 21 The adjustment process has been completed.

Note: The absence balance adjustments occur when the normal Calculate Absence and Payroll process runs, which is generally daily. The donor's vacation balance will be decremented by the donated amount and the recipient's DLR balance will be increased by the donated amount. The recipient can use the DLR hours after the Calculate Absence and Payroll process has run, even though the time is not visible to them. The balance adjustments are not visible to the employee until the pay period has been finalized.

Entering Leave Return Adjustments

- 1 Navigate to the **Absences** page using the following path:
Cardinal FIN > Cardinal HCM > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences
- 2 The **Absences** Search page displays.



- 3 Enter the donor's **Empl ID** number
- 4 Choose the **Calendar ID** for the pay period the return adjustments should occur.
- 5 Click the **Search** button.
- 6 The **Absences** page displays for the selected person

Favorites | Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Employee ID: 7777777777 Name: Bob Barker Empl Record: 0
Pay Group: SEMIMNTHLY Description: Semi-Monthly Salaried AM Pay Entity: COVA
Calendar ID: SMLV201215 Begin Date: 08/10/2012 End Date: 08/24/2012

| Balance Adjustments | | Customize | Find | View All | First | 1 of 1 | Last |
|---------------------|--------------------|--------------------|------------|------------|-------|--------|------|
| Element Name | Description | Balance Adjustment | Begin Date | End Date | | | |
| DLR DON ELEM | DLR Donate Element | -24 | 08/10/2012 | 08/24/2012 | | | |

Save Return to Search Previous in List Next in List Notify

- 7 In the **Element Name** field, select *DLR DON ELEM*.
- 8 In the **Balance Adjustment** field, enter the hours that should be returned to the donor as a negative number. In this scenario, **-24**.
- 9 The **Begin Date** and **End Date** will prefill based on the calendar selected. These prefill after you select the **Element Name**. Delete those prefilled dates out of both fields.
- 10 Click the **Save** button.
- 11 In this scenario, the adjustment was made for the donor, now the adjustment must be made for the recipient. Click the **Return to Search** button.
- 12 The **Absence** search page displays.

Favorites | Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Maximum number of rows to return (up to 300):

Empl ID:

Empl Record:

Pay Group:

Calendar ID:

Name:

Period Begin Date:

Period End Date:

Case Sensitive

[Basic Search](#)

- 13 Enter the **Empl ID** of the recipient.
- 14 Choose the **Calendar ID** for the pay period the return adjustments should occur. This should match what you input for the leave donor.
- 15 Click the **Search** button.
- 16 The **Absences** page displays.

Favorites | Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences

Absences

Employee ID: 00000997000 Name: Paris Parkway Empl Record: 0
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Calendar ID: SMLV201215 Begin Date: 08/10/2012 End Date: 08/24/2012

This Calendar is finalized. Any changes will be considered during retro processing.

| Balance Adjustments | | | | |
|---------------------|---------------------|--------------------|------------|----------|
| Element Name | Description | Balance Adjustment | Begin Date | End Date |
| DLR REC ELEM | DLR Receive Element | -24 | | |

Save Return to Search Previous in List Next in List Notify

- 17 To adjust the recipient's time, select *DLR REC ELEM* for the **Element Name**.
- 18 For **Balance Adjustment**, enter the hours as a negative number. In this scenario, **-24**.
- 19 Delete the dates that prefill in the **Begin Date** and **End Date** fields.
- 20 Click the **Save** button.
- 21 The adjustment process has been completed.

Note: The absence balance adjustments occur when the normal Calculate Absence and Payroll process runs, which is generally daily. The donor's vacation balance will be increased by the returned amount and the recipient's DLR balance will be decremented by the returned amount. The balance adjustments are not visible to the employee until the pay period has been finalized.