

About Extended Leave Processing

Some types of extended absences require different entry, processing and approval. These include FMLA (Family Medical Leave), STD (Short Term Disability), LTD (Long Term Disability), and WCL (Workers' Compensation Leave).

FAMILY MEDICAL LEAVE

Eligibility

An employee's eligibility for FMLA is initially determined by Human Resources. Once Human Resources approves an employee's FMLA leave (outside of Cardinal), the Administrator enters a balance adjustment in Cardinal. Forecasting is required, so a self service user cannot submit an FMLA absence until the Administrator enters a balance.

Event Entry

Determine whether the FMLA event is intermittent or consecutive:

- If the FMLA is intermittent, the employee or manager can enter FMLA takes in self service. An Administrator can enter FMLA on behalf of the employee as well. Forecasting is required. The employee cannot submit requests for more hours than are available in the balance.
- If the FMLA is consecutive, only the Administrator can enter the FMLA take on the **Absence Event** screens. However, the Employee, Manager, and Timekeeper can enter FMLA in **Self Service** on the timesheet.

The FMLA take does not, by itself, create positive input. Another leave take must be entered for the FMLA entered (such as SCK (Sick), VAC (Vacation), or even LNP (Leave Not Paid) or STL (Short Term Disability - LWOP) to indicate unpaid hours). Those takes can be entered with overlapping begin and end dates as needed. If FMLA is used concurrently with CPT (Compensatory Time Taken) or OTT (Overtime Taken), someone with access to the timesheet enters the CPT and OTT takes on the timesheet (top grid). CPT and OTT are not available on the Absence Event page. CPT and OTT must be entered on the timesheet to update the CPT and OTT balances in Time & Labor.

Always enter a **Reason Code** for the FMLA event:

- FMLA Employee
- FMLA Family
- FMLA Military.

FMLA absence events entered by the Administrator do not automatically display as **Approved**. All FMLA events must be approved by a second Administrator. To approve the FMLA absence event, the second Administrator searches for the employee on Absence Event, clicks the Details

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tab for the **FMLA** event, checks the **Manager Approved** box, clicks **OK**, and then clicks **Save**. The workflow status then changes to **Approved**.

Accumulators and Payee Messages

The following accumulators track FMLA usage and related payee messages that generate as warnings when certain accumulator limits are reached.

- **FMLA EMP/FAM BAL:** Includes all FMLA events with a reason of Employee or Family used in the leave year
- **FMLA MILITARY BAL:** Includes all FMLA events with a reason of Military or no reason used in the past rolling 12 months
- **FMLA ROLLOVER BAL:** Includes all FMLA events used in the past rolling 12 months regardless of reason.
- A payee message generates when:
 - The current FMLA reason used is **Employee** or **Family**, and this accumulator either exceeds 480 hours in the leave year or exceeds or the prorated amount for PT employees based on % of fulltime employment.
 - The current FMLA reason used is **Military** and this accumulator exceeds 26 weeks (1040 hours) in the leave year or exceeds the prorated amount for PT employees based on % of full-time employment. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For intermittent FMLA, the Administrator must manually adjust the tracking accumulator as part of the new leave year recertification process if the balance should continue to accumulate.
- **SCK FMLA TAKE BAL:** Includes all SCK events taken since a consecutive FMLA event began. A payee message generates when the employee exceeds 33% usage of the available SCK balance (based on the balance available on the date FMLA event began).
- **SDP FMLA TAKE BAL:** Includes all SDP events taken since a consecutive FMLA event began. A payee message generates when the employee exceeds 33% usage of the available SDP balance (based on the balance available on the date FMLA event began).



Time & Attendance Job Aid

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To access the **Payee Messages** by **Calendar Group**, use the following path:

Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Payee Messages.

The screenshot displays the 'Payee Messages' search interface. At the top, there is a navigation breadcrumb: 'Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Payee Messages'. Below this, a search bar is present with a 'Search' button highlighted in red. The search criteria are set to 'Calendar Group ID: begins with'. The search results are displayed in a table with the following data:

Calendar Group ID	Description
SMLV201303	SMLV Cal Group 03 2013
SMLV201304	SMLV Cal Group 04 2013
SMLV201305	SMLV Cal Group 05 2013
SMLV201306	SMLV Cal Group 06 2013
SMLV201307	SMLV Cal Group 07 2013
SMLV201308	SMLV Cal Group 08 2013
SMLV201309	SMLV Cal Group 09 2013
SMLV201310	SMLV Cal Group 10 2013
SMLV201311	SMLV Cal Group 11 2013
SMLV201312	SMLV Cal Group 12 2013
SMLV201313	SMLV Cal Group 13 2013
SMLV201314	SMLV Cal Group 14 2013

- Click the **Search** button to see a list of available **Calendar Group IDs**.
- Select the **Calendar ID** you want to view and click on it.

Payee Messages

Calendar Group ID: SMLV201303 SMLV Cal Group 03 2013 Country: USA

Selection Criteria

Empl ID From: Empl ID To:

Pay Group: Calendar ID:

Group List ID: Calculation Status:

Message Set: Message Number:

Message Severity:

Select Matching Messages Clear [Go To Print Report](#)

Messages Customize | Find | View All | First 1 of 1 Last

Empl ID	Name	Record	Calc Status	Message	Set	Number	Severity	
		0						Details

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

- Enter specific **Selection Criteria** to limit the results, or click on the **Select Matching Messages** button without entering search criteria to retrieve all payee messages.

Payee Messages

Calendar Group ID: SMLV201303 SMLV Cal Group 03 2013 Country: USA

Selection Criteria

Empl ID From: Empl ID To:

Pay Group: Calendar ID:

Group List ID: Calculation Status:

Message Set: Message Number:

Message Severity:

[Select Matching Messages](#) Clear [Go To Print Report](#)

Messages Customize | Find | View All | First 1-2 of 32 Last

Empl ID	Name	Record	Calc Status	Message	Set	Number	Severity	
00045282800	JOHN DOE	0	Calculation Successful	Employee Exceeds SDP Usage Limit of 33% During FMLA.	25102	2005	Warning	Details
00088888600	MayLee	0	Calculation Successful	Employee Exceeds SDP Usage Limit of 33% During FMLA.	25102	2005	Warning	Details

[Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#)

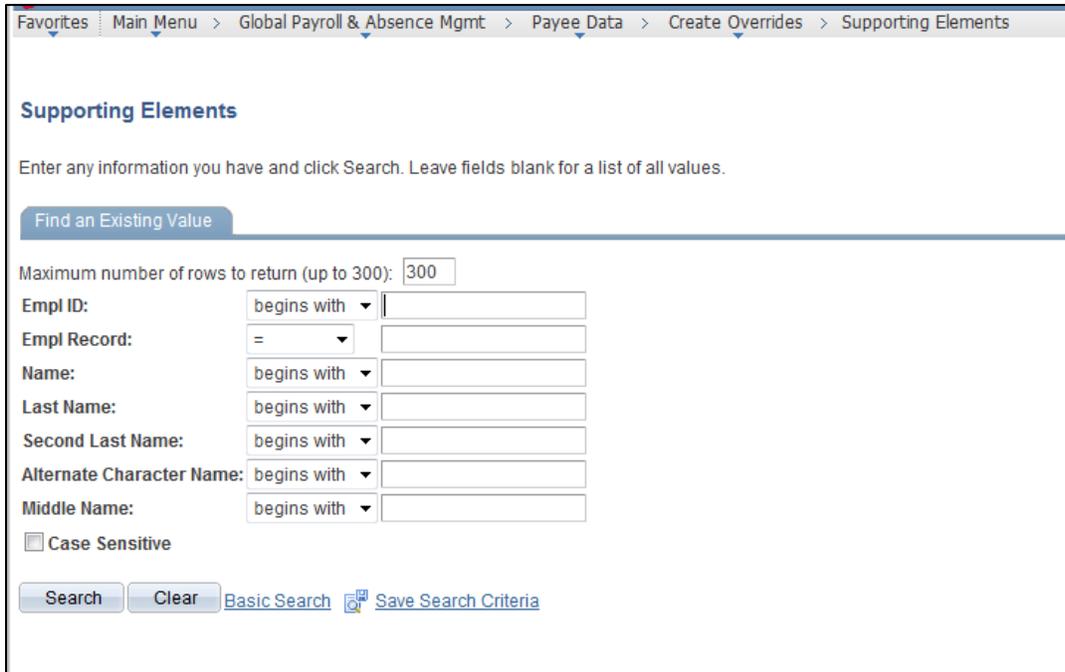
- The **Message** tab displays **Empl ID, Name, Record, Calendar ID, Pay Group and Segment.**

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To adjust an FMLA tracking accumulator, enter a variable override to adjust the current accumulator value.

Navigate to the **Supporting Elements** page using the following path:

Global Payroll & Absence Mgmt > Payee Data > Create Overrides > Supporting Elements.



The screenshot shows a web browser window with the following breadcrumb path: Favorites | Main Menu > Global Payroll & Absence Mgmt > Payee Data > Create Overrides > Supporting Elements. The page title is "Supporting Elements". Below the title, there is a text prompt: "Enter any information you have and click Search. Leave fields blank for a list of all values." A blue button labeled "Find an Existing Value" is positioned above a horizontal line. Below the line, there is a text input field for "Maximum number of rows to return (up to 300):" with the value "300" entered. The search criteria section includes several rows, each with a label, a dropdown menu, and a text input field: "Empl ID:" with a "begins with" dropdown and an empty text box; "Empl Record:" with an "=" dropdown and an empty text box; "Name:" with a "begins with" dropdown and an empty text box; "Last Name:" with a "begins with" dropdown and an empty text box; "Second Last Name:" with a "begins with" dropdown and an empty text box; "Alternate Character Name:" with a "begins with" dropdown and an empty text box; and "Middle Name:" with a "begins with" dropdown and an empty text box. There is also a checkbox labeled "Case Sensitive" which is currently unchecked. At the bottom of the form, there are buttons for "Search" and "Clear", followed by a link for "Basic Search" and a link for "Save Search Criteria".

- Enter the **EmplID** or other **Search Criteria**.
- Click the **Search** button.

[Favorites](#) | [Main Menu](#) > [Global Payroll & Absence Mgmt](#) > [Payee Data](#) > [Create Overrides](#) > [Supporting Elements](#)

Supporting Elements

Employee ID: 00180244600 Empl Record: 0 Name: [John Doe](#)

Payee Supporting Element Override List Customize | Find | View All | First 51-52 of 52 Last

Element Type	Element Name	Description	*Begin Date	End Date	
Variable	V SCK FMLA TAKE BA	V SCK FMLA TAKE BA	11/08/2012	11/09/2012	+ -
Variable	V SCK FMLA TAKE BA	V SCK FMLA TAKE BA	12/18/2012	12/24/2012	+ -

- Click on the plus (+) sign to add a row.
- Enter the **Element Type** – Variable.
- Select the **Element Name**, which is as the accumulator name with a **V** in front (example, to adjust the FMLA ROLLOVER BAL, select the V FMLA ROLLOVER BA variable):
 - V FMLA EMP/FAM BAL
 - V FMLA MILITARY BA
 - V FMLA ROLLOVER BA
 - V SCK FMLA TAKE BA
 - V SDP FMLA TAKE BA
- Enter the **Begin Date** – pay period begin date you want the adjustment to occur.
- Enter the **End Date** – pay period end date you want the adjustment to occur.
- Click on the **Values** tab and enter the positive or negative amount of the adjustment.
- Click the **Save** button.

The next time the **Absence Calc** process runs, the adjustment will be made to the accumulator. If your adjustment is for a future period, it will be made when the **Absence Calc** process is run for the future period).

Accruals

Other leave types that accrue per pay period or annually continue to accrue while the employee is on FMLA, unless FMLA is used concurrently with another leave type that does not allow accrual (i.e. LNP, DLR, STD after 90 consecutive days; WCL after 90 consecutive days).

SHORT TERM DISABILITY

Eligibility

STD can be selected for any employee in the VSDP eligibility group. STD is not an available take in self service; only an Administrator can enter STD for an employee. Beginning balances do not need to be granted prior to using the STD take.

Event Entry

Enter the STD take based on the STD coverage percent:

- If the STD covers 100% of pay, leave the partial hours blank.
- If the STD covers 80% of pay, enter 80% of the scheduled hours as partial hours.
- If the STD covers 60% of pay, enter 60% of the scheduled hours as partial hours.

If STD does not cover 100% of pay, you can enter any other take except SDP to supplement scheduled hours not covered:

- Vacation can be entered for the remaining 20% or 40%.
- DSK can be entered for the remaining 20% or 40%. State policy requires that DSK be used in 8 hour increments. So if DSK is used in conjunction with STD, 8 hours per day is deducted from the DSK balance, regardless of the number of hours you actually enter for each day. For example, if you enter 6.4 STD and 1.6 DSK hours, then 8 DSK hours are deducted from the DSK balance but only 1.6 hours are DSK earnings.
- Enter the actual number of DSK hours that need to be used or substituted. Make sure the total number of absence hours entered for the day does not exceed scheduled hours. This ensures accurate allocation of payroll.
- CPT or OTT takes can be used for hours not covered by STD. Enter them on the timesheet (top grid). CPT and OTT are not available on the Absence Event page. CPT and OTT must be entered on the timesheet in order to update the CPT and OTT balances in Time & Labor.
- STL should be used for the unpaid time (instead of LNP) if the employee does not have sufficient balances of other leave types to cover the difference or chooses not to use paid leave. While an employee is on STD, the holiday schedule on the employee's Job Data record should be updated to the STD holiday schedule. The STD holiday schedule has no holidays, which allows for STD and other absence types used in conjunction with STD to be processed on a holiday. To update an employee's holiday schedule, add an effective dated row on the Job Data record when the employee goes out on STD leave and again when the employee returns from STD leave.
- TRC RSW (Short Term Disability Working) should be used for tracking purposes (instead of RGS) for regular productive hours if the employee is also working while on STD.

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Like FML, LTD and WCL, STD absence events are not auto-approved when entered by the Administrator. They must be approved by a second Administrator. To approve an STD absence event, the second Administrator must:

- Search for **STD** on the **Absence Event** page
- Click on the **Details** tab for the STD event
- Checks the **Manager Approved** box
- Click **OK**
- Click **Save**

The workflow status then changes to **Approved**.

Accumulators and Payee Messages

The following accumulators track STD usage and related payee messages that generate as warnings when certain accumulator limits are reached.

- **STD TAKE BAL DAYS:** Includes all STD events used in the leave year in days rather than hours (regardless of the number of partial hours entered each day) and includes paid holidays but does not include weekends. A payee message generates if the employee exceeds 125 days in the leave year. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For intermittent FMLA, the Administrator manually adjusts the tracking accumulator as part of the new leave year recertification process if the balance should continue to accumulate.
- **STD VAC ACR LMT AC:** Counts consecutive days of STD (regardless of the number of partial hours entered each day) and includes paid holidays and weekends. **The accumulator only includes usage of the STD leave type and not other leave types that may be used as part of the STD waiting period. Prior to 8/25/2013, the accumulator was used to stop vacation or sick accrual when it exceeded 90 days; however, effective 8/25/2013, the accumulator is no longer used to stop accruals and is only used for tracking purposes.** This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For intermittent FMLA, the Administrator manually adjusts the tracking accumulator as part of the new leave year recertification process if the balance should continue to accumulate.

To adjust an STD tracking accumulator, make a variable override and adjust the current accumulator. The Element Name is the same name as the accumulator with a **V** in front:

- V STD TAKE BAL DAY
- V STD VAC ACR LMT

Note: This process is different from the process to adjust a balance accumulator.



Accruals

The vacation accrual formula does not accrue the vacation entitlement in periods where the employee has been on STD for 90+ consecutive calendar days, as determined by the absence of any regular TRCs in the preceding 90 day period. In order for the employee to continue accruing vacation within the first 90 days of STD, the STL take should be used for any leave without pay instead of the LNP take. The employee will accrue vacation once they have returned to work for a full pay period. Prior to 8/25/2013, accruals were not granted in any period where the employee had a **Return from Leave** action on the job record; however, effective 8/25/2013, the employee will accrue if they have used any regular hours in the past 90 days.

If an employee is on STD (80% or 60%) for more than 90 consecutive days and is also working 20+ hours per week to supplement the uncovered hours (RSW), the vacation accrual formula will accrue. If accruals were previously stopped and the employee returns part-time, they will accrue in the period of return provided they return on the first scheduled work day of the period.

The VSDP sick and VSDP personal entitlements does not accrue on January 10, at the beginning of the leave year, if the employee has used STD in the 24th pay period of the previous leave year and has not also keyed any regular hours (RGS, RSW, RLW) in that same period. If an employee returns from STD leave and did not accrue VSDP sick and VSDP personal on January 10, the Administrator must enter balance adjustments to grant the entitlements upon return.

LONG TERM DISABILITY

Eligibility

LTD can be selected for any employee in the VSDP eligibility group. LTD is not an available take in self service; only an Administrator can enter LTD for an employee. Beginning balances do not need to be granted prior to using the LTD take.

Entry

The LTD take can be entered with any other take on the same day in order to substitute scheduled hours not covered by LTD.

If CPT or OTT takes are used to substitute hours not covered by LTD, the CPT and OTT takes should be entered on the timesheet (top grid) because they are not available on the Absence Event page. The entry of CPT and OTT must occur on the timesheet in order to update the CPT and OTT balances in Time & Labor.

Regular productive hours worked while the employee is on LTD are entered on the timesheet using the TRC RLW (Long Term Disability Working) rather than RGS for tracking purposes. (The employee is required to work a minimum of 20 hours per week while on LTD in order to remain an active employee.)

LTD absence events are not auto-approved by the Administrator. All LTD events must be approved by a second Administrator. To approve an LTD event, the second Administrator must:

- Search for the employee on **Absence Event**
- Click on the **Details** tab for the LTD event
- Check the **Manager Approved** box
- Click **OK**
- Click **Save**.

The workflow status changes to **Approved**.

The Standard Hours on the employee's position and job record must be updated to reflect the number of hours the employee is working while on LTD. To update an employee's position and job record, add an effective dated row on the **Position Data** record when the employee goes on LTD leave and again when the employee returns from LTD leave, and check to make sure the Job Data record is updated online with the same effective dates.

Do not change the employee's schedule. The employee is still expected to fulfill the scheduled hours with a combination of RLW, LTD or other productive and non-productive TRCs as appropriate.

Accruals

The vacation accrual formula continues to accrue vacation for employees on LTD. The hours granted will be prorated based on the percentage of standard hours/week the employee is working (as indicated on the employee's Job record) and based on years of service. For example, an employee who normally accrues 8 VAC hours per pay period and is working 20 hours per week while on LTD will accrue 4 VAC hours.

The VSDP sick and VSDP personal entitlements do not accrue on January 10 at the beginning of the leave year if the employee has used LTD in the 24th pay period of the previous leave year and has not also keyed any regular hours (RGS, RSW, RLW) in that same period. If an employee returns from LTD leave and did not accrue VSDP sick and VSDP personal on January 10, the Administrator must enter balance adjustments to grant the entitlements upon return.

Holiday hours are prorated based on the percentage of standard hours/week the employee is working during periods of LTD (as indicated on the employee's Job record). For example, an employee who is working 20 hours per week while on LTD will be granted 4 HOL hours for a regular 8-hour holiday.

WORKERS' COMPENSATION LEAVE

Eligibility

WCL can be selected for any employee in any eligibility group. WCL is not an available take in self service; only an Administrator can enter WCL for an employee. Beginning balances do not need to be granted prior to using the WCL take.

Entry

When entering a WCL take, the Comments field on the Details page of the event should be used to record the WC claim number. If a single WCL event is entered for an employee and the hours need to be charged to 2 or more claim numbers, the text entered in the Comments field should indicate the number of hours charged to each claim since only one WCL event can be entered per day.

The WCL take can be entered with any other take on the same day, in order to substitute scheduled hours not covered by WCL (if WCL coverage is not 100%).

- If the employee does not have sufficient balances of other leave types to cover the difference or chooses not to use paid leave, use the STL take (instead of the LNP take) to indicate the unpaid time.
- If CPT or OTT takes are used to substitute hours not covered by WCL, they are entered on the timesheet (top grid) by someone with access to the timesheet. CPT and OTT are not available on the Absence Event page. The entry of CPT and OTT on the timesheet (top grid) updates the CPT and OTT balances in Time & Labor.

WCL absence events are not auto-approved by the Administrator. All WCL events must be approved by a second Administrator. To approve a WCL absence event the second Administrator must:

- Search for the employee on **Absence Event** page
- Click on the **Details** tab for the WCL event
- Checks the **Manager Approved** box
- Clicks **OK**
- Click **Save**

The workflow status then changes to **Approved**.

Accumulators

The following accumulators track WCL usage and related payee messages that generate as warnings when certain accumulator limits are reached.

- **WCL TAKE BAL DAYS:** Counts consecutive days of WCL (regardless of the number of partial hours entered each day) and includes paid holidays and weekends. The accumulator is used for tracking purposes only and does not have an associated payee message. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. For

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intermittent FMLA that should continue to accumulate, the Administrator manually adjusts the tracking accumulator as part of the new leave year recertification process.

- **WCL VAC ACR LMT AC:** Counts consecutive days of WCL (regardless of the number of partial hours entered each day) and includes paid holidays and weekends. The accumulator only includes usage of the WCL leave type and not other leave types that may be used as part of the WCL waiting period. Prior to 8/25/2013, the accumulator was used to stop vacation or sick accrual when it exceeded 90 days; however, effective 8/25/2013, the accumulator is no longer used to stop accruals and is only used for tracking purposes. This accumulator automatically zeroes out at the beginning of the new leave year unless a consecutive FMLA event crosses over into the new leave year. As part of the new leave year recertification process, the Administrator manually adjusts the tracking accumulator for intermittent FMLA that should continue to accumulate.

To adjust a WCL tracking accumulator, enter a variable override:

- Element Name – same name as the accumulator with a **V** in front
 - V WCL TAKE BAL DAY
 - V WCL VAC ACR LMT

Accruals

The vacation and traditional sick accrual formula does not accrue entitlements in periods where the employee has been on WCL for 90+ consecutive calendar days, as determined by the absence of any regular TRCs in the preceding 90 day period.. In order for the employee to continue accruing vacation and traditional sick entitlements within the first 90 days of WCL, use the STL take (instead of the LNP take) for any leave without pay.

The employee accrues vacation and traditional sick entitlements once they have returned to work for a full pay period. Prior to 8/25/2013, accruals were not granted in any period where the employee had a **Return from Leave** action on the job record; however, effective 8/25/2013, the employee will accrue if they have used any regular hours in the past 90 days.

The VSDP sick and VSDP personal entitlements do not accrue on January 10, at the beginning of the leave year, if the employee has used WCL in the 24th pay period of the previous leave year and has not also keyed any regular hours (RGS, RSW, RLW) in that same period. If an employee returns from WCL leave and did not accrue VSDP sick and VSDP personal on January 10, the Administrator must enter balance adjustments to grant the entitlements upon return.