



**ESS Reviewing Absence and Leave Balances**

This Job Aid provides Employee Self-Service (ESS) users information on how to review Absence and Leave Balances. It starts with the overview of the **Comprehensive Absence Summary** page and then a review of the **Leave Balances** page and the **Absence Balances** page for more detailed information. If you need additional information related to your leave and absence balances, please see your supervisor, an Absence Management Administrator, or a Time & Labor Administrator.

**Reminder:** In Cardinal, the terms “Absence” and “Leave” are not synonymous. The following guidelines apply:

**Leave Types:** The term “Leave” in Cardinal refers specifically to Compensatory and Overtime Leave only.

**Absence Types:** The term “Absence” in Cardinal refers to Absence Types such as Vacation, VSDP Sick Leave, etc.

**Note:** Balances for Absence Types do not include unprocessed hours such as hours in a “Saved” status or unapproved absence hours in a “Needs Approval” status.

**Table of Contents**

Overview of the Comprehensive Absence Summary Page .....2

Review the Leave Balances Page.....7

Review and Forecast Absence Balances ..... 11

Review Leave Year End Guidelines ..... 17



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

### Overview of the Comprehensive Absence Summary Page

The **Comprehensive Absence Summary** page provides a consolidated overview of all leave and absence balances and accruals. It includes:

- Current vacation accrual rate
- Year-to-date hours (earned and taken)
- Current balances for Absence Types as of the last finalized leave period
- Details for Leave and Absence Types that expire

1. Navigate to the **Comprehensive Absence Summary** page using the following path:

**Time Tile > Timesheet page > Comprehensive Absence Summary**

The **Timesheet** page displays by default.

The screenshot shows the 'Timesheet' page interface. On the left, a navigation menu lists several options: 'Timesheet', 'Time Summary', 'View Exceptions', 'Payable Time', 'Leave Balances', 'View Requests', 'Absence Balances', and 'Comprehensive Absence Summary'. The 'Comprehensive Absence Summary' link is highlighted with a red box. The main content area displays employee information (Employee ID, Empl Record, Time Reporting Type, Earliest Change Date), a 'Select Another Timesheet' section with a date picker (set to 12/17/2023) and a view-by dropdown (set to Week), and a table for reporting hours. The table has columns for days of the week (Sun 12/17 to Sat 12/23) and a 'Total' column. Below the table are 'Save for Later' and 'Submit' buttons.

2. Click the **Comprehensive Absence Summary** link from the menu list.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

The View Comprehensive Absence Summary page displays.

**View Comprehensive Absence Summary**

Employee ID: [Redacted]  
Vacation Accrual Rate: 9.00000

Leave Type	Description	Balance Forward	Earned YTD	Taken YTD	Adjusted YTD	Donated YTD	Current Balance	Expired Balance	Maximum Allowable
1 CCL	Compensatory Leave Taken		15.00		15.00		15.00		
2 CSL	Volunteer Service Leave		16.00				16.00		

Expiring Leave Types - History Details

Leave Type	Description	Earned Date/Taken Date	Earned Hours	Taken Hours
1 CCA	Comp Time Leave Adjust	07/17/2023	15.000000	

Expiring Leave Types - Balance Details

Leave Type	Total Earned	Total Taken	Balance
1 COMP_LEAVE	15.000000		15.000000

1. All Absence Management Leave Information is based on the last finalized Calendar in the System.  
2. Comp Time and Overtime balances are based on the System Date.

3. The **Vacation Accrual Rate** field displays the number of vacation hours accrued for each pay period.

**View Comprehensive Absence Summary**

Employee ID: [Redacted]  
Vacation Accrual Rate: 9.000000

Leave Type	Description	Balance Forward	Earned YTD	Taken YTD	Adjusted YTD	Donated YTD	Current Balance	Expired Balance	Maximum Allowable
1 CCL	Compensatory Leave Taken		15.00		15.00		15.00		
2 CSL	Volunteer Service Leave		16.00				16.00		

Expiring Leave Types - History Details

Leave Type	Description	Earned Date/Taken Date	Earned Hours	Taken Hours
1 CCA	Comp Time Leave Adjust	07/17/2023	15.000000	

Expiring Leave Types - Balance Details

Leave Type	Total Earned	Total Taken	Balance
1 COMP_LEAVE	15.000000		15.000000

1. All Absence Management Leave Information is based on the last finalized Calendar in the System.  
2. Comp Time and Overtime balances are based on the System Date.

4. Click the **View All** link to see the complete list of all Leave and Absence Types available.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

Cardinal Homepage Time

Timesheet  
Payable Time  
Leave Balances  
View Requests  
Absence Balances  
Comprehensive Absence Summary

### View Comprehensive Absence Summary

Employee ID [Redacted]  
Vacation Accrual Rate 9.000000  
Prog Admin Specialist II

1-8 of 8 | View 2

Leave Type	Description	Balance Forward	Earned YTD	Taken YTD	Adjusted YTD	Donated YTD	Current Balance	Expired Balance	Maximum Allowable
1 CCL	Compensatory Leave Taken		15.00		15.00		15.00		
2 CSL	Volunteer Service Leave		16.00				16.00		
3 DSK	Converted Disability Credits	27.00					27.00		
4 ERL	Org Recognition Leave	4.00		4.00					
5 OCL	Overtime Leave Taken		10.50				10.50		240.00
6 PER	VSDP Personal Leave		40.00	40.00					
7 SDP	VSDP Sick Leave		80.00	29.00			51.00		
8 VAC	Vacation	392.00	96.00	29.00			459.00		432.00

- The **Leave Type** and **Description** fields display the name of the Leave or Absence Type. Use the small scroll bar immediately to the right of the balances if needed to see the complete list of each Leave and Absence Type.
- The **Current Balance** field for Absence Types are based on the last finalized leave period associated with the last pay date. This value does not include hours in a saved status, not approved by your supervisor, or not yet finalized in the system. An example of hours not yet finalized are hours earned or taken in a prior leave period but entered in the current open leave period.
- For Absence Types, the **Maximum Allowable** field displays the maximum number of hours that can be carried over into the next leave year for certain Absence Types when applicable. For Leave Types (Compensatory and Overtime Leave), the **Maximum Allowable** field displays the max balance that you can have at any given time.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

**View Comprehensive Absence Summary**

Employee ID: [Redacted]  
Vacation Accrual Rate: 9.000000

Leave Type	Description	Balance Forward	Earned YTD	Taken YTD	Adjusted YTD	Donated YTD	Current Balance	Expired Balance	Maximum Allowable
1 CCL	Compensatory Leave Taken		15.00		15.00		15.00		
2 CSL	Volunteer Service Leave		16.00				16.00		

**Expiring Leave Types - History Details**

[View All](#)

Leave Type	Description	Earned Date/Taken Date	Earned Hours	Taken Hours
1 CCA	Comp Time Leave Adjust	07/17/2023	15.000000	

**Expiring Leave Types - Balance Details**

[View All](#)

Leave Type	Total Earned	Total Taken	Balance
1 COMP_LEAVE	15.000000		15.000000

1. All Absence Management Leave Information is based on the last finalized Calendar in the System.  
2. Comp Time and Overtime balances are based on the System Date.

- The **Expiring Leave Types – History Details** section contains the history related to when certain Leave or Absence Types were earned or taken.
- Click the **View All** link to see the complete list.

**Expiring Leave Types - History Details**

[View All](#)

Leave Type	Description	Earned Date/Taken Date	Earned Hours	Taken Hours
1 CCA	Comp Time Leave Adjust	07/17/2023	15.000000	
2 ERL	Org Recognition Leave	12/24/2022	4.000000	
3 ERL	Org Recognition Leave	04/07/2023		4.000000

- The **Leave Type** and **Description** fields provide the Leave or Absence Type name.
- The **Earned Date/Taken Date** field displays the date that the leave or absence was either earned or taken.
- The **Earned Hours** and **Taken Hours** fields display the number of hours that were either earned or taken for each Leave or Absence Type.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

Expiring Leave Types - Balance Details

1-1 of 2 [View All](#)

Leave Type	Total Earned	Total Taken	Balance
1 COMP_LEAVE	15.000000		15.000000

1. All Absence Management Leave Information is based on the last finalized Calendar in the System.  
2. Comp Time and Overtime balances are based on the System Date.

- 13. The **Expiring Leave Types – Balance Details** section displays Absence and Leave Types that expire along with their balance information.
- 14. Click the **View All** link to see the full list when applicable.

Expiring Leave Types - Balance Details

1-2 of 2 [View 1](#)

Leave Type	Total Earned	Total Taken	Balance
1 COMP_LEAVE	15.000000		15.000000
2 ERL	4.000000	4.000000	

1. All Absence Management Leave Information is based on the last finalized Calendar in the System.  
2. Comp Time and Overtime balances are based on the System Date.

- 15. The **Leave Type** field lists the name of the leave or absence.
- 16. The **Total Earned** field displays the total number or hours earned for each Leave or Absence Type.
- 17. The **Total Taken** field displays the total number of hours that have been taken for each Leave or Absence Type.

**Note:** The balances for each Leave or Absence Type listed in the **Expiring Leave Types – Balance Details** section should match the balances listed on your timesheet under the **Absence** tab or the **Leave / Compensatory Time** tab. You need to apply policy expiration timeframes to the dates earned to determine exactly when the leave will expire.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

### Review the Leave Balances Page

This section of the Job Aid provides information for reviewing your Compensatory Leave and Overtime Leave balances.

1. Navigate to the **Leave Balances** page using the following path:

**Time Tile > Timesheet page > Leave Balances**

The **Timesheet** page displays by default.

The screenshot shows the 'Timesheet' application interface. On the left is a navigation menu with the following items: Timesheet, Time Summary, View Exceptions, Payable Time, Leave Balances (highlighted with a red box), View Requests, Absence Balances, and Comprehensive Absence Summary. The main content area is titled 'Timesheet' and displays employee information: Employee ID, Empl Record (0), Time Reporting Type (Exception), and Earliest Change Date (01/10/2024). Below this is a 'Select Another Timesheet' section with a 'View By' dropdown set to 'Week' and a 'Date' field set to '12/17/2023'. It also shows 'Scheduled Hours' as 32.00 and 'Reported Hours' as 0.00. At the bottom, there is a table for the week of Sunday 12/17/2023 to Saturday 12/23/2023, with columns for each day and a 'Total' column. The table contains empty input fields for time reporting. At the bottom of the table are 'Save for Later' and 'Submit' buttons.

2. Click the **Leave Balances** link from the menu list.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

The **Leave Balances** page displays.

Leave Type	Balance	Maximum Balance
COMP_LEAVE	15.00	1000 >
OT_LEAVE	10.50	1000 >

3. Under the **Leave Balances Summary (In Hours)** section, you can view the current balances for each Leave Type.
4. The **Leave Type** field displays the type of leave.
5. The **Balance** field displays the total current balance for each Leave Type.
6. The **Leave Type** names are links that can be clicked to see more details about each Leave Type.

Leave Type	Balance	Maximum Balance
COMP_LEAVE	15.00	1000 >
OT_LEAVE	10.50	1000 >

7. Click the **COMP\_LEAVE** link.

The **Leave Balance Details** section displays for the selected Leave Type.

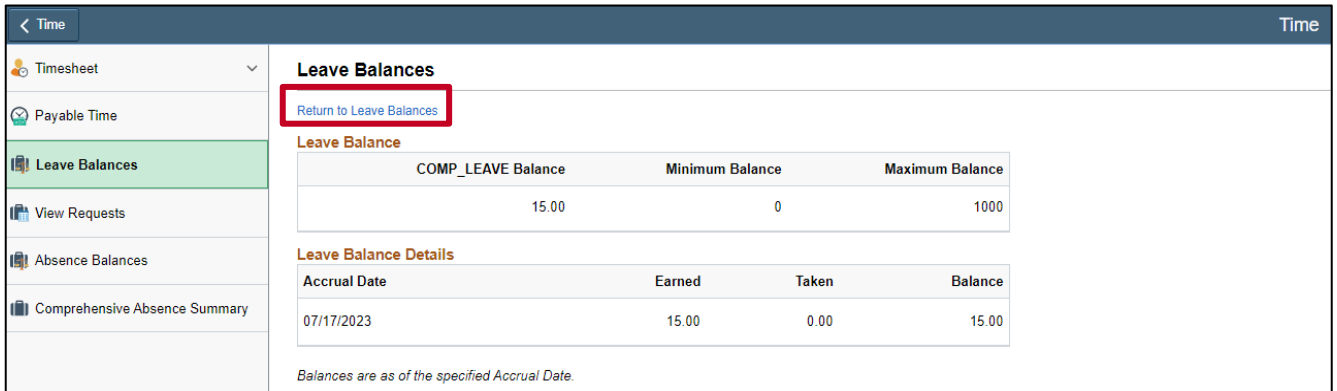
Accrual Date	Earned	Taken	Balance
07/17/2023	15.00	0.00	15.00

*Balances are as of the specified Accrual Date.*

**Note:** Disregard the Maximum Balance displayed. This number does not actually reflect the maximum balance that you can have at any given time in accordance with State/Agency policy.



8. The **Leave Balance Details** displays the Accrual Date, whether the hours were earned or taken on that date, and the current balance hours for the Compensatory Leave.



The screenshot shows the 'Leave Balances' section with a 'Return to Leave Balances' link highlighted in a red box. Below it is a table for 'Leave Balance' and a 'Leave Balance Details' table.

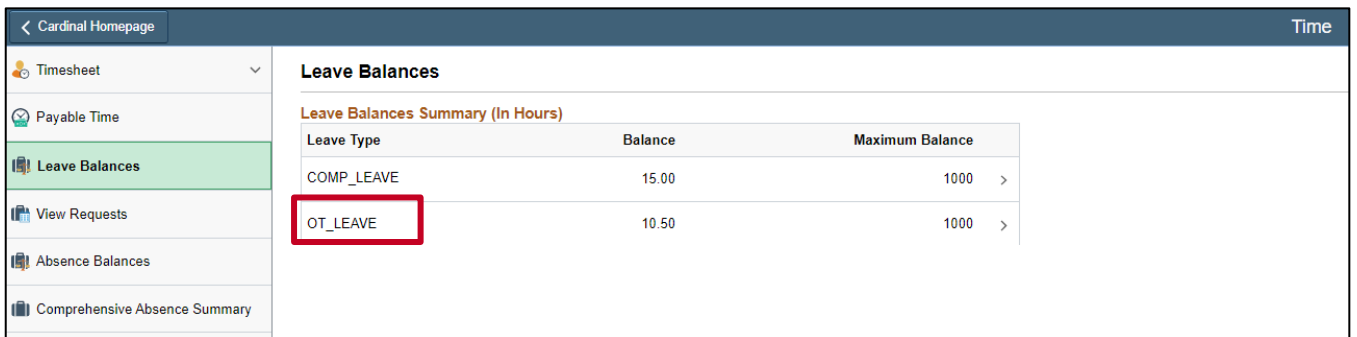
Leave Balance			
COMP_LEAVE Balance	Minimum Balance	Maximum Balance	
15.00	0	1000	

Leave Balance Details			
Accrual Date	Earned	Taken	Balance
07/17/2023	15.00	0.00	15.00

*Balances are as of the specified Accrual Date.*

9. Click the **Return to Leave Balances** link to return back to the summary view.

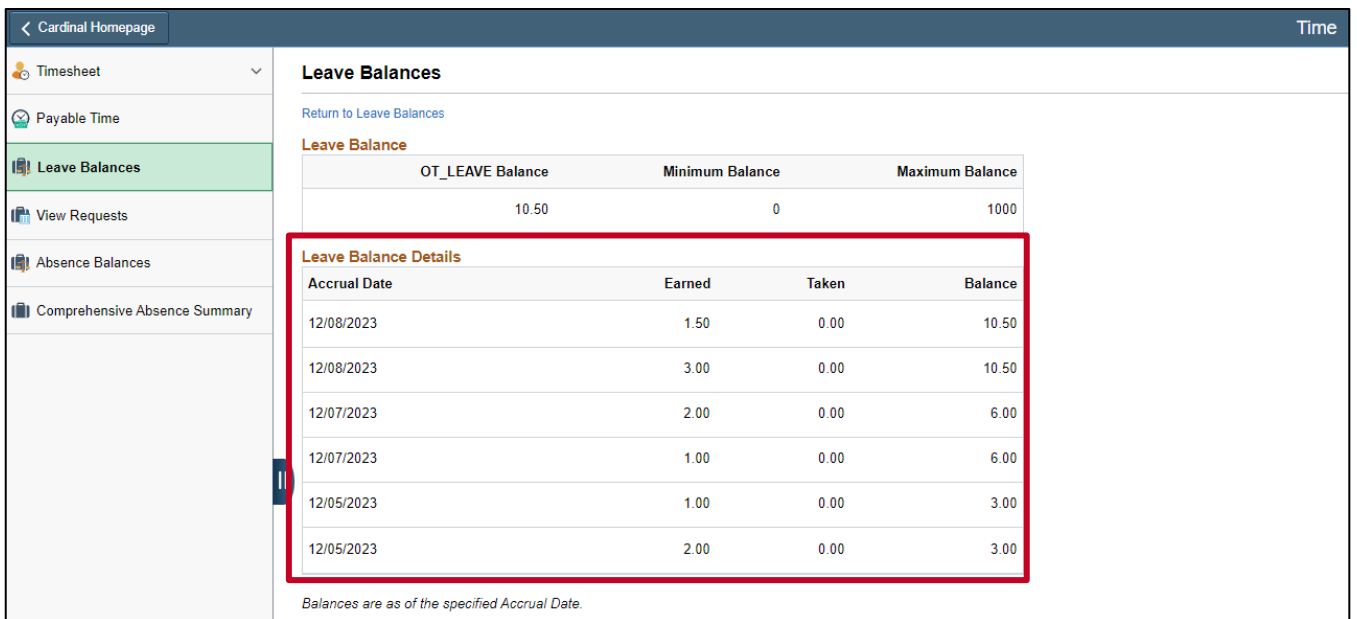


The screenshot shows the 'Leave Balances Summary (In Hours)' table with 'OT\_LEAVE' highlighted in a red box.

Leave Type	Balance	Maximum Balance
COMP_LEAVE	15.00	1000 >
OT_LEAVE	10.50	1000 >

10. To view the Overtime leave details, click the **OT\_LEAVE** link.

The **Leave Balance Details** section displays for the selected leave type.



The screenshot shows the 'Leave Balance Details' table for 'OT\_LEAVE' highlighted in a red box.

Leave Balance			
OT_LEAVE Balance	Minimum Balance	Maximum Balance	
10.50	0	1000	

Leave Balance Details			
Accrual Date	Earned	Taken	Balance
12/08/2023	1.50	0.00	10.50
12/08/2023	3.00	0.00	10.50
12/07/2023	2.00	0.00	6.00
12/07/2023	1.00	0.00	6.00
12/05/2023	1.00	0.00	3.00
12/05/2023	2.00	0.00	3.00

*Balances are as of the specified Accrual Date.*



**Note:** Disregard the Maximum Balance displayed. This number does not actually reflect the maximum balance that you can have at any given time in accordance with State/Agency policy.

11. The **Leave Balance Details** displays the Accrual Date, whether the hours were earned or taken on that date, and the current balance hours for the Overtime Leave.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

### Review and Forecast Absence Balances

This section of the Job Aid provides the steps to review your Absence balances.

1. Navigate to the **Absence Balances** page using the following path:

**Time Tile > Timesheet page > Absence Balances**

The **Timesheet** page displays by default.

The screenshot shows the 'Timesheet' page in a web application. On the left is a navigation menu with items: Timesheet, Time Summary, View Exceptions, Payable Time, Leave Balances, View Requests, Absence Balances (highlighted with a red box), and Comprehensive Absence Summary. The main content area shows the 'Timesheet' page for an employee named 'Proo Admin Specialist II'. It includes fields for Employee, Empl Record (0), Time Reporting Type (Exception), and Earliest Change Date (01/10/2024). There is a 'Select Another Timesheet' section with a 'View By' dropdown set to 'Week' and a date field set to '12/17/2023'. Below this, it shows 'Scheduled Hours' as 32.00 and 'Reported Hours' as 0.00. At the bottom, there is a table header for the week of Sunday 12/17/2023 to Saturday 12/23/2023, with columns for each day and a 'Total' column. The table body contains empty input boxes for time reporting. At the bottom of the page are 'Save for Later' and 'Submit' buttons.

2. Click the **Absence Balances** link from the menu list.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

The **Absence Balances** page displays.

Absence Balances	
<b>Service Recognition Leave</b> As Of 07/09/2023	0.00 Hours
<b>Other Leave</b> As Of 07/09/2023	0.00 Hours
<b>Parental Leave</b> As Of 07/09/2023	0.00 Hours
<b>Family Medical Leave</b> As Of 07/09/2023	0.00 Hours
<b>VSDP Sick Leave</b> As Of 07/09/2023	51.00 Hours
<b>Sick Leave</b> As Of 07/09/2023	0.00 Hours
<b>Pre-Layoff Leave</b> As Of 07/09/2023	0.00 Hours
<b>VSDP Personal Leave</b> As Of 07/09/2023	0.00 Hours
<b>Military Bank Leave</b> As Of 07/09/2023	0.00 Hours
<b>Organization Recognition Leave</b> As Of 07/09/2023	0.00 Hours
<b>Emergency Service Volunteer</b> As Of 07/09/2023	0.00 Hours
<b>Educational Leave Pay Docking</b> As Of 07/09/2023	0.00 Hours
<b>Educational Leave w/ Pay</b> As Of 07/09/2023	0.00 Hours

3. The balance for each Absence Type is displayed. Review as needed.

**Note:** The As of date represents the date of the last finalized period. The balances displayed here match the balances displayed on the **Comprehensive Absence Summary** page and the balances displayed on the **Absences** tab of your Timesheet.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

Category	As Of	Hours
Educational Leave w/ Pay	07/09/2023	0.00 Hours
Victim of Disaster	07/09/2023	0.00 Hours
Converted Disability Credits	07/09/2023	27.00 Hours
Donated Leave Rec (Lv Share)	07/09/2023	0.00 Hours
Bone Marrow/Organ Donations	07/09/2023	0.00 Hours
Pre-disciplinary leave 2	07/09/2023	0.00 Hours
Pre-disciplinary leave 1	07/09/2023	0.00 Hours
Military Leave Disaster	07/09/2023	0.00 Hours
Military Physical	07/09/2023	0.00 Hours
Military Leave	07/09/2023	0.00 Hours
Volunteer Service Leave	07/09/2023	16.00 Hours
Annual Leave Incentive	07/09/2023	0.00 Hours
Vacation	07/09/2023	459.00 Hours

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

4. Use the scroll bar immediately to the right of the hours balances to scroll down and see the complete list of absence balances.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

Leave Type	As Of	Hours
Educational Leave w/ Pay	07/09/2023	0.00 Hours
Victim of Disaster	07/09/2023	0.00 Hours
Converted Disability Credits	07/09/2023	27.00 Hours
Donated Leave Rec (Lv Share)	07/09/2023	0.00 Hours
Bone Marrow/Organ Donations	07/09/2023	0.00 Hours
Pre-disciplinary leave 2	07/09/2023	0.00 Hours
Pre-disciplinary leave 1	07/09/2023	0.00 Hours
Military Leave Disaster	07/09/2023	0.00 Hours
Military Physical	07/09/2023	0.00 Hours
Military Leave	07/09/2023	0.00 Hours
Volunteer Service Leave	07/09/2023	16.00 Hours
Annual Leave Incentive	07/09/2023	0.00 Hours
Vacation	07/09/2023	459.00 Hours

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

[Forecast Balance](#)

5. Use the main scroll bar to scroll down to the bottom of the **Absence Balances** page until you see the **Forecast Balance** link.
6. Click the **Forecast Balance** link.



# Time & Attendance Job Aid

## ESS\_Reviewing Absence and Leave Balances

As Of 07/09/2023	Hours
<b>Donated Leave Rec (Lv Share)</b> As Of 07/09/2023	27.00 Hours
<b>Bone Marrow/Organ Donations</b> As Of 07/09/2023	0.00 Hours
<b>Pre-disciplinary leave 2</b> As Of 07/09/2023	0.00 Hours
<b>Pre-disciplinary leave 1</b> As Of 07/09/2023	0.00 Hours
<b>Military Leave Disaster</b> As Of 07/09/2023	0.00 Hours
<b>Military Physical</b> As Of 07/09/2023	0.00 Hours
<b>Military Leave</b> As Of 07/09/2023	0.00 Hours
<b>Volunteer Service Leave</b> As Of 07/09/2023	16.00 Hours
<b>Annual Leave Incentive</b> As Of 07/09/2023	0.00 Hours
<b>Vacation</b> As Of 07/09/2023	459.00 Hours

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

**Forecast Balance**


As of Date: 12/21/2023

Filter by Type: All

\*Absence Name: Select Absence Name

7. Use the main scroll bar and scroll down until you see the **As of Date**, **Filter by Type**, and **Absence Name** fields under **Forecast Balance**.

Forecast Balance

As of Date  

Filter by Type

\*Absence Name  Current Balance 459.00 Hours\*\*

8. To forecast an absence balance, complete the following:

- a. **As of Date:** Enter or select the date for which you want to forecast the balance.
- b. **Filter by Type:** Use the dropdown menu to select the specific Absence Type that you want to forecast.
- c. **Absence Name:** Use the dropdown menu to select the specific Absence Name.

**Note:** The **Current Balance** hours and **Forecast Balance** button display after the Absence Name has been selected.

9. Click the **Forecast Balance** button.

The **Forecast Details** page displays in a pop-up window.

**Forecast Details** ×

Vacation	547.00
01/10/2023 - 01/09/2024	

10. The forecasted balance displays for the requested Absence Type. This is just an estimated projection based on the absence data in Cardinal at the time of forecasting. Forecasting accounts for saved Absence Events as well as those Absence Events that have been submitted and approved. Review as needed.

**Note:** It is very important to forecast any balances that you may lose and plan accordingly towards the end of the Leave Year.



### Review Leave Year End Guidelines

This section of the Job Aid should be referenced to finalize the period ending January 9 and calculate the annual carryover/forfeiture and new year entitlements effective January 10. Absences can still be reported for both the old and new leave years, up to 90 days in the past or future. Forecasting accounts for saved Absence Events as well as those Absence Events that have been submitted and approved.

Balances in Cardinal will be carried forward, forfeited, and entitled for the new leave year based on DHRM policy.

- Classified employees follow DHRM Policy and have a leave year from January 10 to January 9
- Gubernatorial Appointees follow the Executive Leave Plan which runs from January 15 to January 14. See the [Executive Leave Policy](#) for more information

For a full list of the applicable DHRM policies and details click the button below.

[DHRM Leave Policies](#)