

Rewards and Recognition Overview**Leave Reward:**

There are two methods by which leave awards are entered:

1. Agencies using Cardinal as their leave system of record only need to enter leave awards as balance adjustments or entitlements into Cardinal Absence Management. For further information on entering Absence Entitlements, see the Job Aid titled **TA372 Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
2. Agencies not using Cardinal as their leave system of record additionally need to enter the leave award hours in the agency's external leave system of record to allow the employee to use the granted leave.

Cardinal does not automatically generate an interface to any external leave systems to grant the related leave award. The agency HR Administrator enters the award adjustment into the external agency leave system for the hours to be reflected in the employee's leave balance.

Consolidated reporting pulls leave awards from the **Cardinal Leave Award** page and **Cardinal Absence Management** to show statewide totals of leave awards. For further information on Reports, see the **HCM Human Resources Reports Catalog**. The HCM Human Resources Reports Catalog can be found on the Cardinal website under **Resources**.

Monetary Bonus:

All Monetary Bonus/Awards must be entered on the **Reward and Recognition** page regardless if your agency is using Cardinal Absence Management.

Agency HR Administrator tracks the employee's:

- written agreement
- expiration date of the written agreement per incentive bonus awarded
- payment installments (singular or multiple – as needed)

Important Note: Entering information on the Rewards and Recognition page **does not create** any transaction for bonus payment. **HR or PY Admins** should coordinate and use the **V_HR_REWARD_RECOGN_MASS_DATA** query results to support SPOT transactions for processing bonuses or other earnings adjustments.

Mass Uploads:Agencies using Cardinal Absence Management

- The **TA792_Leave Balance Adjustment Mass Template** should be used if there is a large volume of leave balance adjustments. The agency can submit an Excel file to be uploaded using the mass upload process.
- The **HR409_Reward and Recognition Mass Upload Template** should be used for monetary awards. For further information on Mass Uploads, see the Job Aid titled **Performing a Mass Upload**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Agencies not using Cardinal Absence Management

- The **HR409_Reward and Recognition Mass Upload Template** should be used for both monetary and leave awards. For further information on Mass Uploads, see the Job Aid titled **Performing a Mass Upload**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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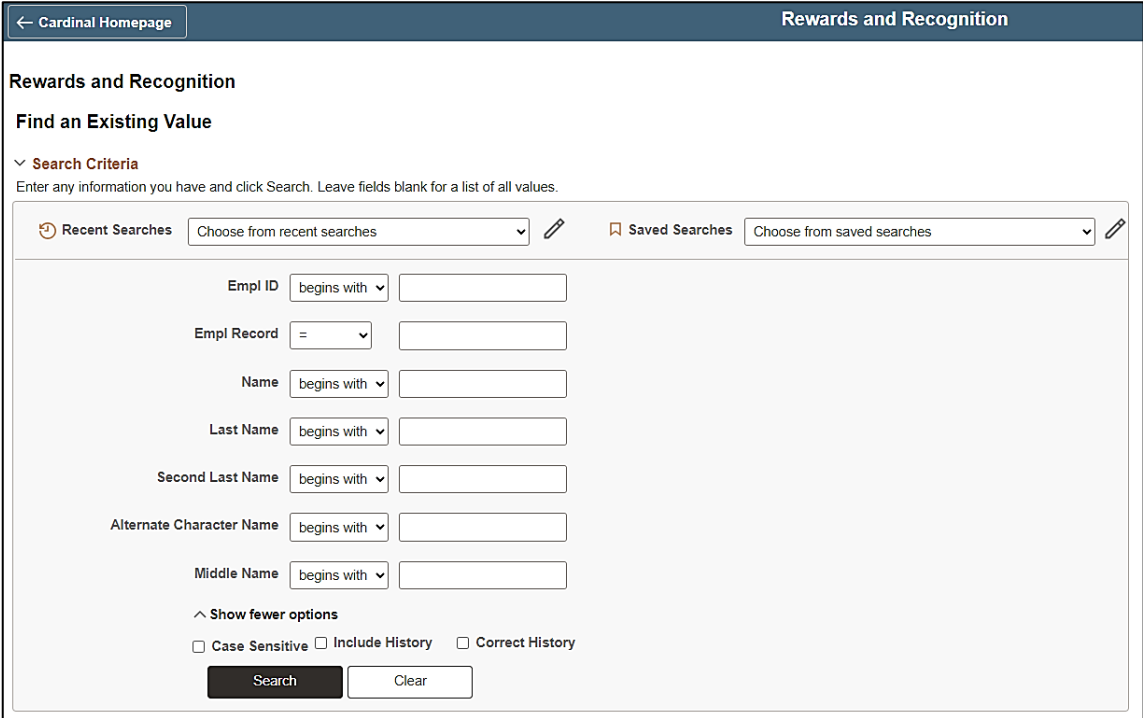




Revision History

| Revision Date | Summary of Changes |
|---------------|--|
| 3/1/2025 | Updated the screenshots of the Search pages (Section 1 , after Step 1; Section 2 , after Step 1; Section 3 , after Step 1; Section 4 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid. |

Adding a Reward and Recognition

Reminder: Agencies using the Cardinal Absence Management system do not record leave on the **Rewards and Recognition** page. Instead, it is entered in Cardinal Absence Management.

| Step | Action |
|---|--|
| 1. | <p>Navigate to the Rewards and Recognition page using the following path: NavBar > Menu > Workforce Development > Rwd and Recogn Maintenance</p> <p>The Rewards and Recognition Find an Existing Value page displays.</p>  |
|  | <p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p> |
| 2. | <p>Enter the employee’s Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p>  |

| Step | Action |
|------|---------------------------------|
| 3. | Click the Search button. |

The **Rewards and Recognition** page for the applicable employee displays. The **Reward ID** is auto-assigned.

Rewards and Recognition

Employee Name:

Employee ID:

Business Unit:

Empl Record: 0

Position:

Critical/Hard to Hire: N

Note: Hourly employees are eligible for bonuses only.

Reward

1 of 2

View All

Reward ID: 2

+

-

Authorization/Written Agreement

1 of 1

View All

*Effective Date:

05/25/2022

*Creation Date:

05/25/2022

+

-

Expiration Date:

*Written Agreement?

Yes

*Reward Type:

RNB

Retention Bonus

Authorized Hours:

0.00

Authorized Amount:

\$5,000.00

YTD Hours Awarded:

0.00

YTD Amount Paid:

\$5,000.00

Comments:

12m

251 characters remaining

Award Payouts

1 of 1

*Award Date:

05/25/2022

Award Hours:

0.00

Award Amount:

\$2500

+

-

Last Update Date/Time:

Save

Return to Search








Previous in List


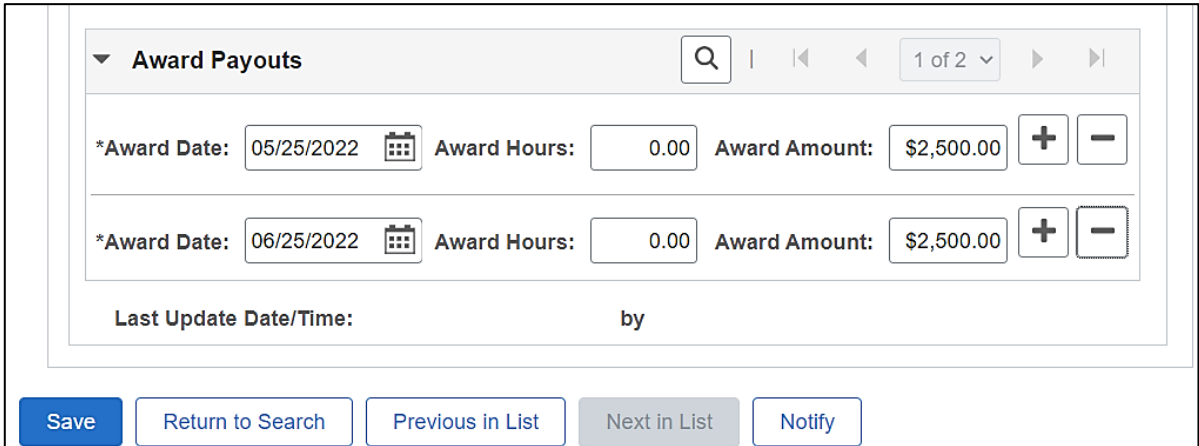


Next in List

Notify

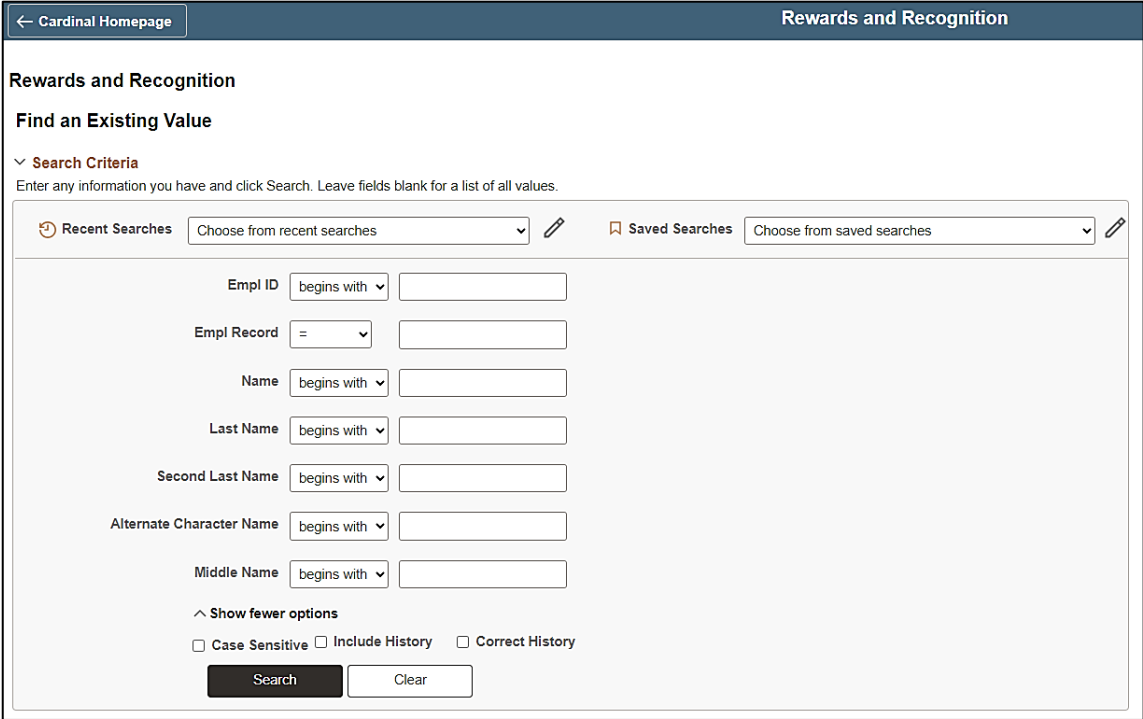



| | |
|----|---|
| 4. | Click the Effective Date Calendar icon and select the date of the award. This is the date that the award was made to the employee. |
|----|---|

*Effective Date:

| Step | Action |
|---|---|
| 5. | <p>The Creation Date field defaults to the date the Reward and Recognition was created. Update as needed</p> <p>*Creation Date: <input type="text"/> </p> |
| 6. | <p>Click the Expiration Date Calendar icon and select the date that the Reward and Recognition expires. Check the written agreement or Policy statement for information.</p> <p>Expiration Date: <input type="text"/> </p> |
| 7. | <p>Click the Written Agreement dropdown button and select the applicable value ("Yes" or "No").</p> <p>*Written Agreement? Yes </p> |
| 8. | <p>Select the applicable reward type using the Reward Type Look Up icon.</p> <p>*Reward Type: <input type="text"/> </p> |
| 9. | <p>Complete either the Authorized Hours field or the Authorized Amount field by entering the applicable hours or amount.</p> <p>Authorized Hours: <input type="text" value="0.00"/> Authorized Amount: <input type="text"/></p> |
|  | <p>Depending on the type of reward (monetary or leave) the appropriate field will open for entry.</p> |
| 10. | <p>Enter any applicable comments (up to 254 characters) in the Comments field.</p> <p>Comments: <input type="text"/></p> |
| 11. | <p>Enter the date the employee should receive the payment or hours in the Award Date field.</p> <p>*Award Date: <input type="text"/> </p> |
| 12. | <p>Complete either the Award Hours field or the Award Amount field by entering the applicable hours or amount.</p> <p>*Award Date: <input type="text"/>  Award Hours: <input type="text" value="0.00"/> Award Amount: <input type="text"/></p> |

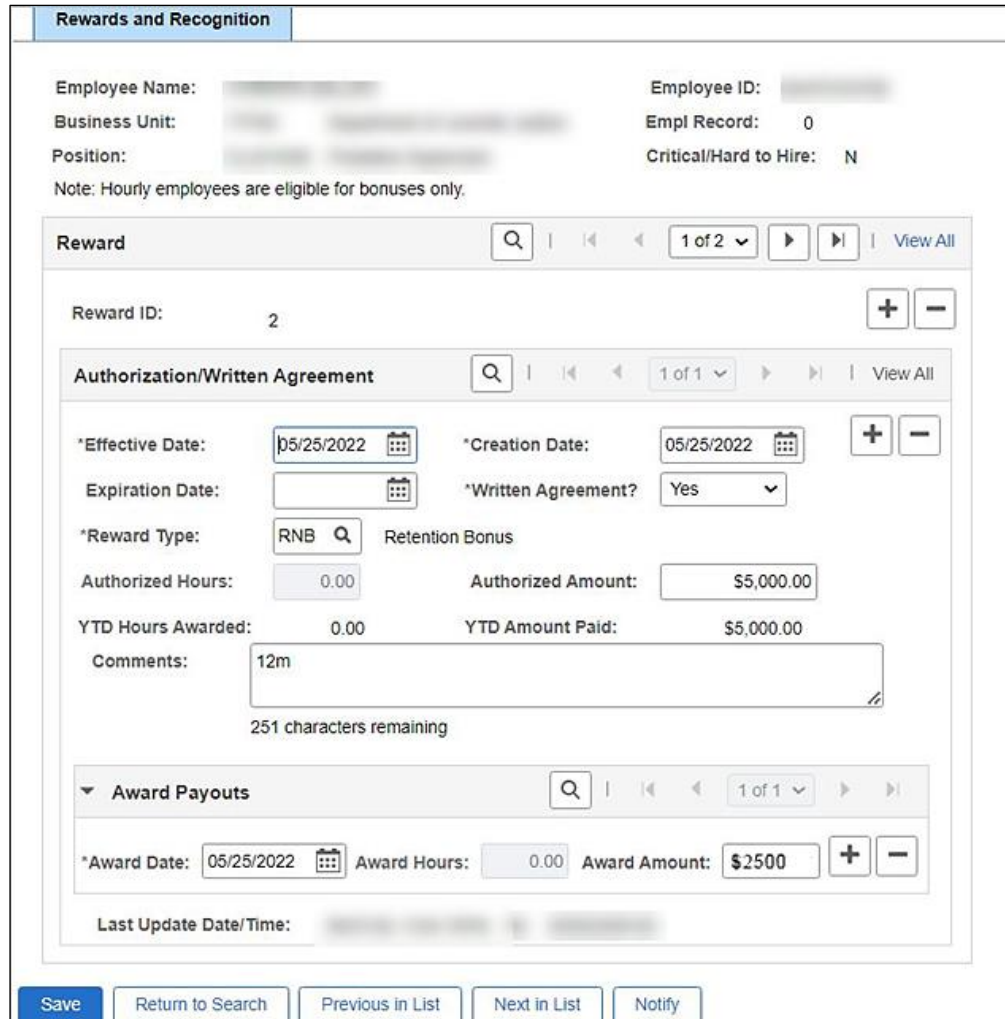
| Step | Action |
|---|---|
|  | <p>If this is a “Leave” reward type, enter the hours in the Award Hours field. Upon saving, the value for YTD Hours Awarded field will be the total hours for the associated reward type during the leave year ending on January 9th. If this is a “Cash” reward type, enter the amount in the Award Amount field. Upon saving, the value for YTD Amount Paid field will be the actual paid amounts for the associated reward type during the fiscal year ending on June 30th.</p> <p>If the amount is going to be paid out on different dates, insert the applicable number of rows using the Add a Row icon and repeat Steps 11 and 12.</p> <div data-bbox="290 625 1482 1068">  </div> |
| 13. | <p>Click the Save button.</p> <div data-bbox="290 1157 1153 1230">  </div> |
|  | <p>After saving, the Last Update Date Time and By fields auto-populate.</p> |

Adding an Additional Award

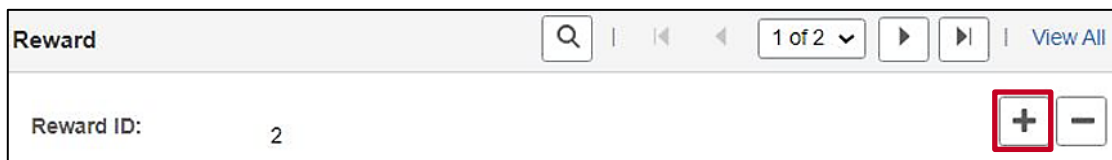
| Step | Action |
|------|--|
| 1. | <p>Navigate to the Rewards and Recognition page using the following path: NavBar > Menu > Workforce Development > Rwd and Recogn Maintenance</p> <p>The Rewards and Recognition Find an Existing Value page displays.</p>  |
| 2. | <p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p>  |
| 3. | <p>Click the Include History checkbox.</p>  |
| 4. | <p>Click the Search button.</p>  |

| Step | Action |
|------|--------|
|------|--------|

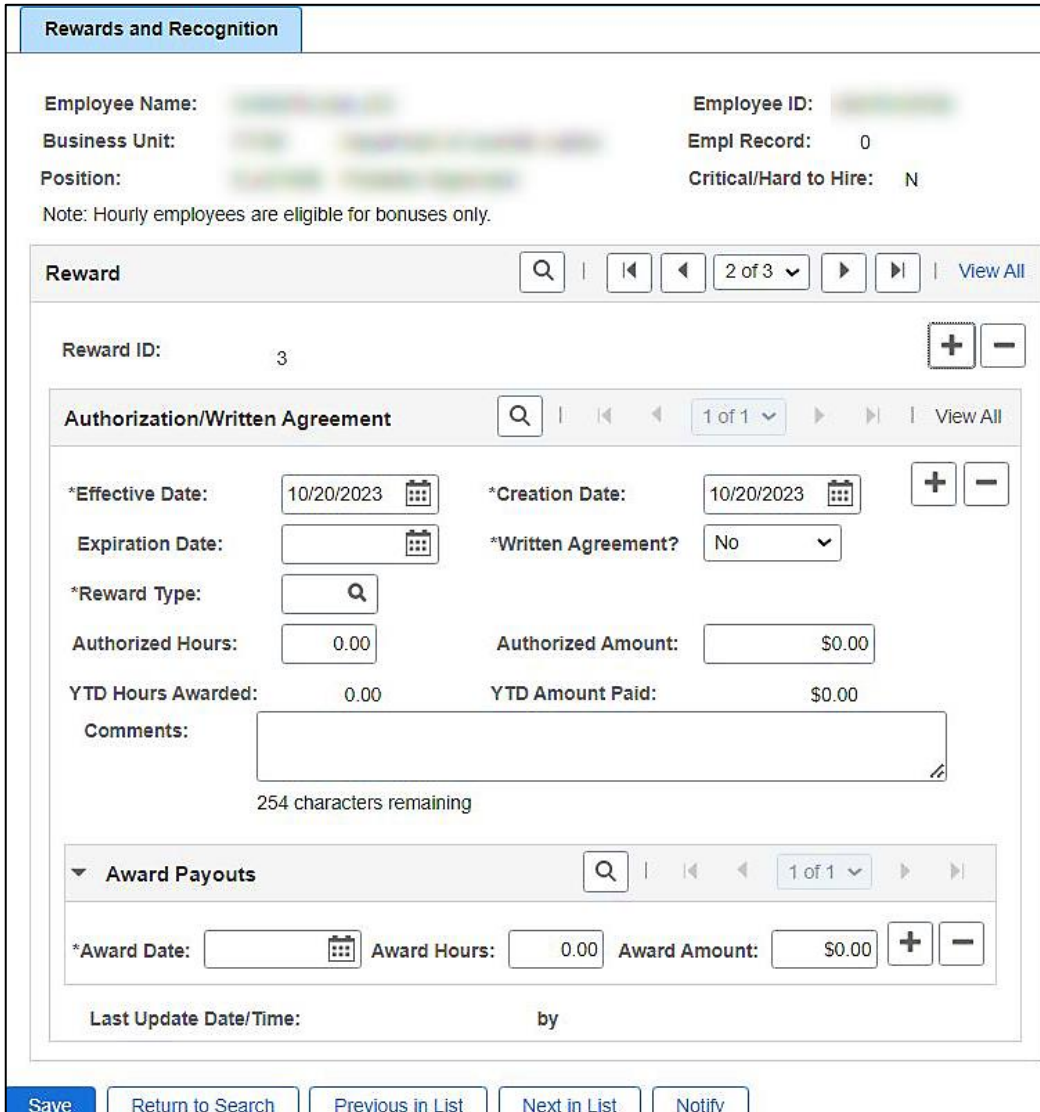


The **Rewards and Recognition** page for the applicable employee displays.




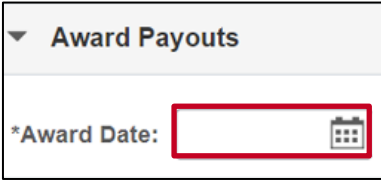



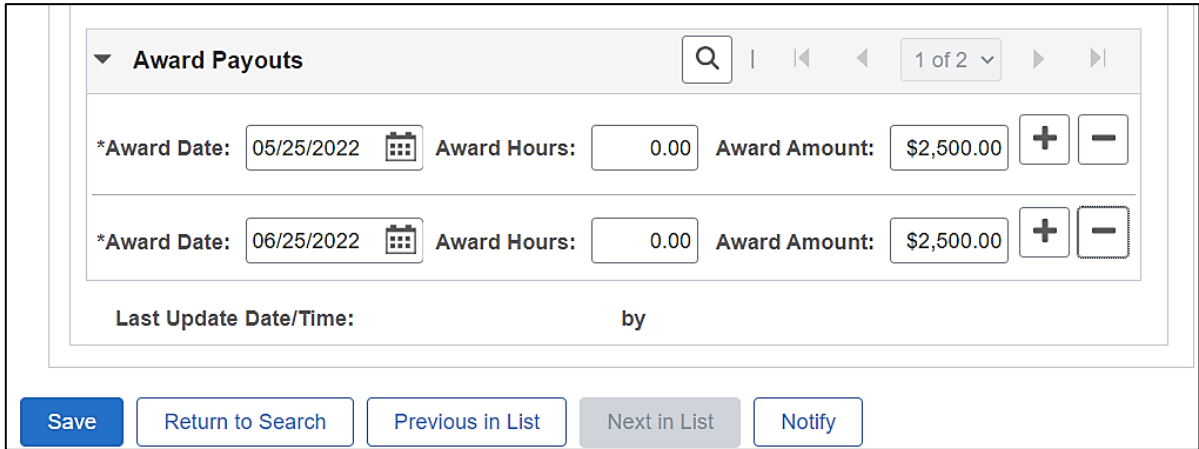


- Click the **Add a Row (+)** icon in the **Reward ID Header** to add an additional Reward ID for the employee.




Validate that the insert has taken place at the **Reward ID** level and not the **Authorization/Written Notice** level.

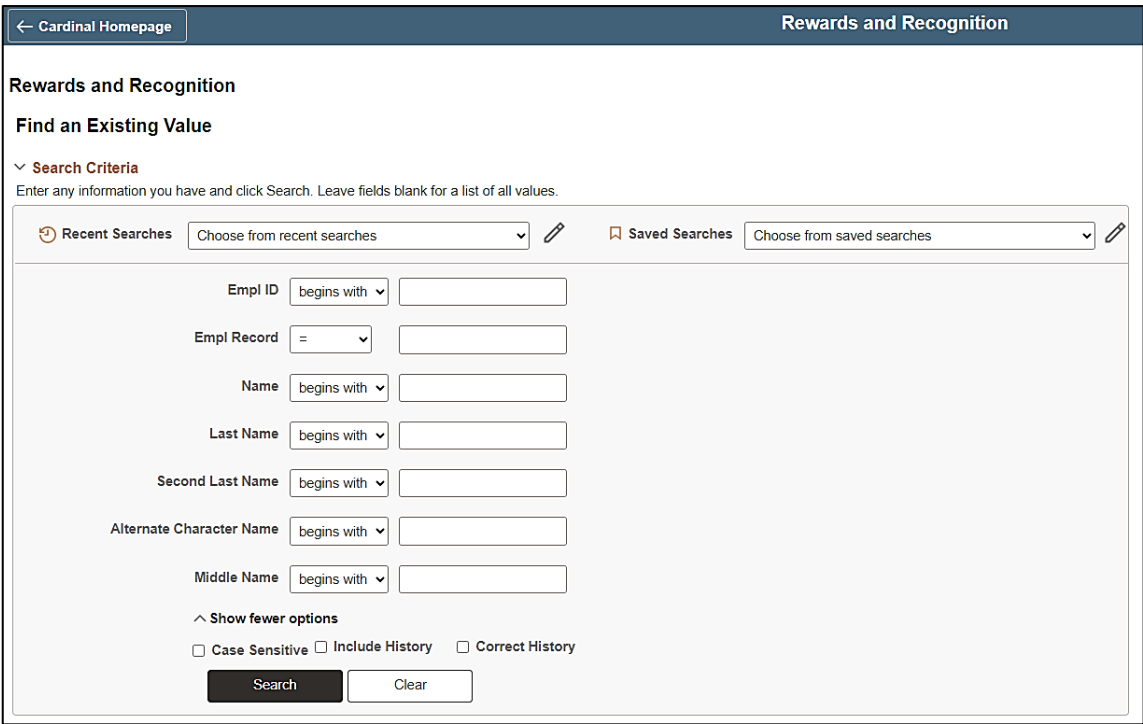


| Step | Action |
|------|---|
| | <p>The page refreshes and the next available Reward ID displays. The next Reward ID number is auto assigned.</p> <div data-bbox="297 407 1331 1512">  </div> |
| 6. | <p>Click the Effective Date Calendar icon and select the date of the Reward.</p> <div data-bbox="297 1602 795 1675">  </div> |
| 7. | <p>The Creation Date field defaults to the date the Reward and Recognition was created.</p> <div data-bbox="297 1766 795 1839">  </div> |

| Step | Action |
|------|---|
| 8. | Click the Expiration Date Calendar icon and select the date that the Reward and Recognition expires. Expiration Date: <input type="text"/>  |
| 9. | Click the Written Agreement dropdown button and select the applicable value ("Yes" or "No"). *Written Agreement? <input type="text" value="Yes"/>  |
| 10. | Select the applicable reward type using the Reward Type Look Up icon. *Reward Type: <input type="text"/>  |
| 11. | Complete either the Authorized Hours field or the Authorized Amount field by entering the applicable hours or amount. Authorized Hours: <input type="text" value="0.00"/> Authorized Amount: <input type="text"/> |
| 12. | Enter any applicable comments (up to 254 characters) in the Comments field. Comments: <input type="text"/> |
| 13. | In the Awards Payout section, enter the Award Date which is the payout date of the Award. <div></div> |
| 14. | Complete either the Award Hours field or the Award Amount field by entering the applicable hours or amount. Award Hours: <input type="text" value="0.00"/> Award Amount: <input type="text"/> |

| Step | Action |
|---|---|
|  | <p>If this is a “Leave” reward type, enter the hours in the Award Hours field. Upon saving, the value for YTD Hours Awarded field will be the total hours for the associated reward type during the leave year ending on January 9th. If this is a “Cash” reward type, enter the amount in the Award Amount field. Upon saving, the value for YTD Amount Paid field will be the actual paid amounts for the associated reward type during the fiscal year ending on June 30th.</p> <p>If the amount is going to be paid out on different dates, insert the applicable number of rows using the Add a Row icon and repeat Steps 13 and 14.</p> <div data-bbox="289 625 1481 1071">  </div> |
| 14. | <p>Click the Save button.</p> <div data-bbox="289 1159 1156 1234">  </div> |
|  | <p>After saving, the Last Update Date Time and By fields auto-populate.</p> |

Adding a New Payout to an Existing Reward

Scenario: A project-based bonus with an authorized amount of \$5,000 has been entered. The initial payment of \$2,500 has been entered for payout on 6/30/2023. Now the end of the project has come and the additional \$2,500 needs to be added for payout.

| Step | Action |
|---|--|
| 1. | <p>Navigate to the Rewards and Recognition page using the following path: Menu > Workforce Development > Rwd and Recogn Maintenance</p> <p>The Rewards and Recognition Find an Existing Value page displays.</p>  |
|  | <p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p> |
| 2. | <p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p>  |



Human Resources Job Aid

HR351_ Rewards and Recognition

| Step | Action |
|------|---|
| 3. | Click the Include History checkbox. <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div> |
| 4. | Click the Search button. <div><div>Search</div><div>Clear</div></div> |

The **Rewards and Recognition** page for the applicable employee displays.

Rewards and Recognition

Employee Name:

Employee ID:

Business Unit:

Empl Record:

Position:

Critical/Hard to Hire: N

Note: Hourly employees are eligible for bonuses only.

Reward

1 of 1

View All

Reward ID: 1

+

-

Authorization/Written Agreement

1 of 1

View All

*Effective Date: 06/01/2023

*Creation Date: 06/23/2023

+

-

Expiration Date: 12/31/2023

*Written Agreement? Yes

*Reward Type: PBB

Project Based Bonus

Authorized Hours: 0.00

Authorized Amount: 5000.00

YTD Hours Awarded: 0.00

YTD Amount Paid: \$0.00

Comments: Project based bonus of \$5000 to be paid in two installments. First payment within first 60 days and the second at the end of the project.

117 characters remaining

Award Payouts

1 of 1

View All

*Award Date: 06/30/2023

Award Hours: 0.00

Award Amount: \$2500.00



+

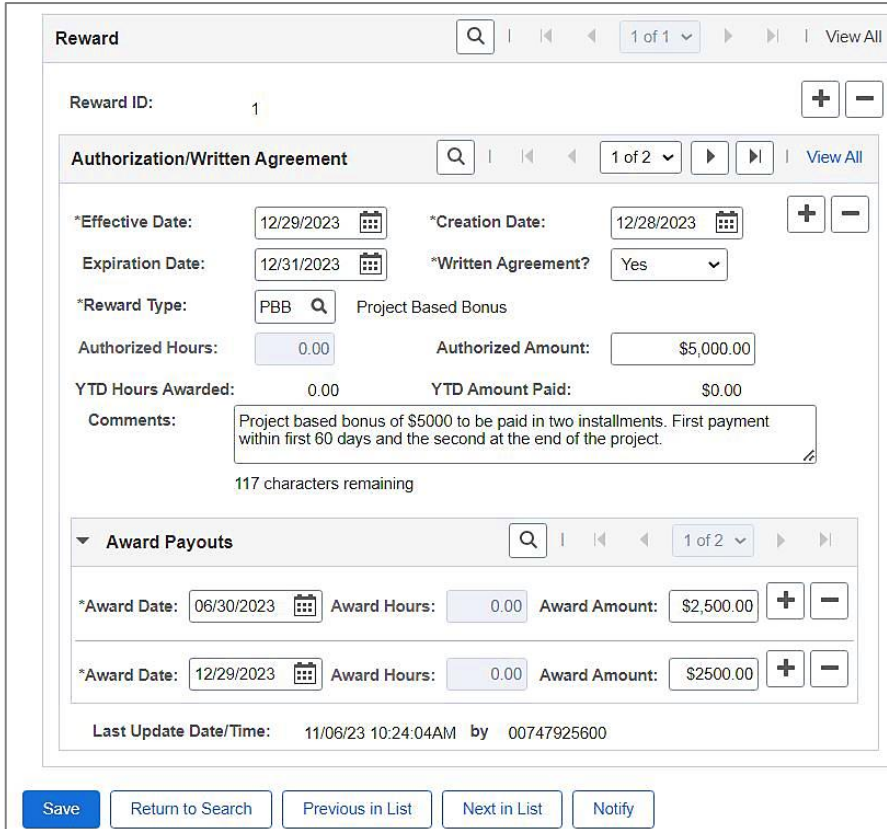



-

Last Update Date/Time:

by

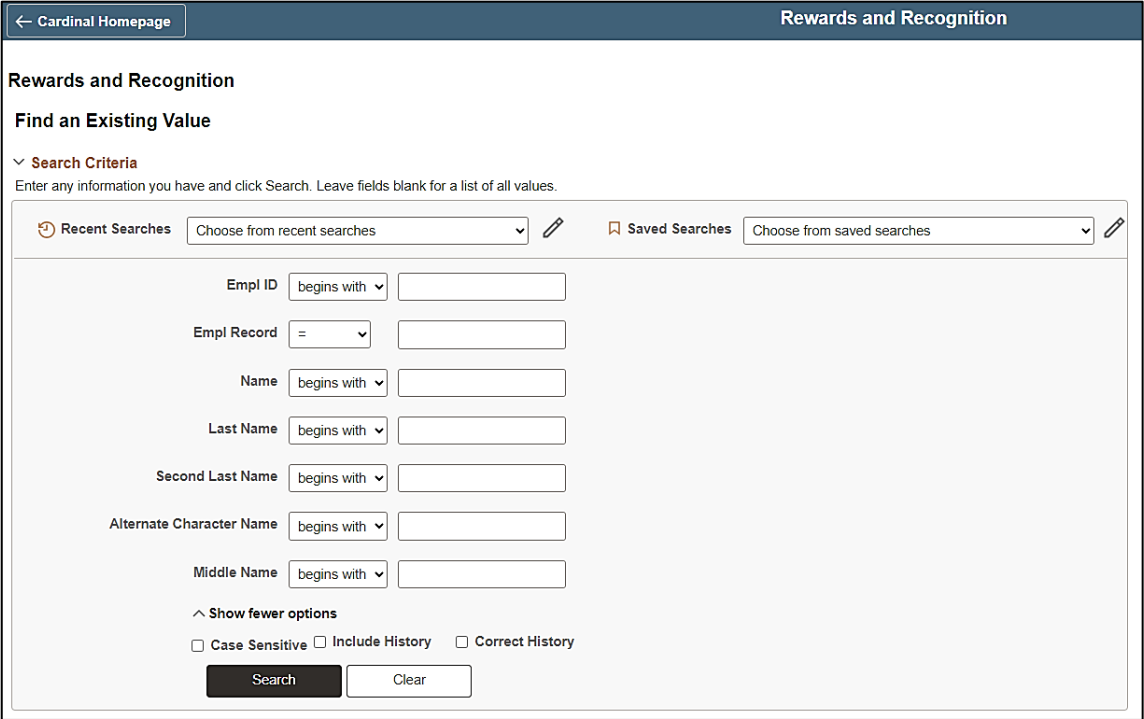



| | |
|----|---|
| 5. | The first Reward ID displays by default. Use the arrows within the Reward header as needed to navigate to the Reward ID that requires the Award Payout section to be updated. <div><div>Reward</div><div>1 of 2</div><div>▶▶</div><div>View All</div></div> |
|----|---|

| Step | Action |
|------|---|
| 6. | <p>Click the Add a Row (+) icon within the Authorization/Written Agreement section to update the existing Reward Type to add a new award payout.</p>  <p>The screenshot shows a table header 'Authorization/Written Agreement' with a search icon, navigation arrows, and a '1 of 1' dropdown. Below the header, there are two date fields: '*Effective Date:' with the value '06/01/2023' and '*Creation Date:' with the value '06/23/2023'. To the right of these fields are two buttons: a '+' button (highlighted with a red box) and a '-' button.</p> |
| 7. | <p>Click the Effective Date Calendar icon and select the applicable date. This date can be the current date but cannot be same as the original effective date of the reward id.</p>  <p>The screenshot shows a single row with the label '*Effective Date:' followed by a text input field and a calendar icon (highlighted with a red box).</p> |

| Step | Action |
|------|--|
| | <p>The Rewards and Recognition page with new Award Payout.</p>  |
| 8. | <p>Click the Add a Row icon within the Awards Payouts section to add a new award payout.</p>  |
| 9. | <p>Click the Award Date Calendar icon and select the date that the payment is to be made to the employee.</p>  |
| 10. | <p>Complete either the Award Hours field or the Award Amount field by entering the applicable hours or amount.</p>  |

| Step | Action |
|---|---|
| 11. | <p>Click the Save button.</p> <div><div>Save</div><div>Return to Search</div><div>Previous in List</div><div>Next in List</div><div>Notify</div></div> |
|  | After saving, the Last Update Date Time and By fields auto-populate. |

Modifying (Correcting) an Existing Reward and Recognition Award

| Step | Action |
|---|--|
| 1. | <p>Navigate to the Rewards and Recognition page using the following path: Menu > Workforce Development > Rwd and Recogn Maintenance</p> <p>The Rewards and Recognition Find an Existing Value page displays.</p>  |
|  | <p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p> |
| 2. | <p>Enter the employee’s Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p>  |
| 3. | <p>Click the Include History checkbox.</p>  |

| Step | Action |
|------|---------------------------------|
| 4. | Click the Search button. |

The **Rewards and Recognition** page for the applicable employee displays.

Rewards and Recognition

Employee Name:

Employee ID:

Business Unit:

Empl Record:

Position:

Critical/Hard to Hire: N

Note: Hourly employees are eligible for bonuses only.

Reward

1 of 1

View All

Reward ID: 1

+

-

Authorization/Written Agreement

1 of 1

View All

*Effective Date: 06/01/2023

*Creation Date: 06/23/2023

Expiration Date: 12/31/2023

*Written Agreement? Yes

*Reward Type: PBB Project Based Bonus

Authorized Hours: 0.00

Authorized Amount: 5000.00

YTD Hours Awarded: 0.00

YTD Amount Paid: \$0.00

Comments: Project based bonus of \$5000 to be paid in two installments. First payment within first 60 days and the second at the end of the project.

117 characters remaining

Award Payouts

1 of 1

View All

*Award Date: 06/30/2023

Award Hours: 0.00

Award Amount: \$2500.00

+

-

Last Update Date/Time:








by

| | |
|----|--|
| 5. | <p>The first Reward ID displays by default. Use the arrows within the Reward header as needed to navigate to the Reward ID that needs to be updated.</p> |
|----|--|

Reward

1 of 2

View All

| Step | Action |
|---|--|
| 6. | <p>Use the arrows in the Authorization/Written Agreement section as needed to navigate to the Reward Type that needs to be updated.</p>  |
| 7. | <p>Click the Add a Row (+) icon within the Authorization/Written Agreement section to update the existing Reward Type.</p>  |
| 8. | <p>Click the Effective Date Calendar icon and select the date for the update. Use the day after the original effective date if that date has not already been used for the reward ID being corrected.</p> <p>Note: This page does not have the Effective Sequence field so the same effective date cannot be used within the same Reward ID.</p>  |
| 9. | <p>The remaining fields default from the previous row for the Reward Type. Update the applicable fields to correct the entry.</p> |
|  | <p>The Award Date field indicates the exact date the payment should be made, or the hours should be awarded to the employee. In the case of monetary awards, the information in the Awards Payout section should be provided to an agency Payroll Administrator to payout via the SPOT tool.</p>  |
| 10. | <p>Click the Save button.</p>  |
|  | <p>After saving, the Last Update Date Time and By fields auto-populate.</p> |