

Time & Labor Setup Overview

This Job Aid provides users with the Time and Labor Employee Setup Administrator role guidance for the key activities involved in Time and Attendance employee setup. The employee setup process involves the assignment of time reporting attributes to employees which control the Timesheet fields and values available, and the business rules applied during Timesheet entry and processing.

In Cardinal, Time and Labor (TL) enrollments for Time Reporter Data and Comp Plans are controlled by the TL Auto Enrollment process, which automates most employee setup in Time and Attendance. Criteria used by the TL Auto Enrollment process is configured based on state and Agency policies and business practices. The TL Auto Enrollment batch process runs daily to evaluate Job Data changes (i.e. new hires, terminations, transfers, position changes, etc.) and assigns appropriate Timesheet reporting and processing values.

Time Reporting Codes (TRCs) for Online and Interface Time Entry are used to report time on the Timesheet. The Time Administration process translates the Reported Time TRC to the relevant Payable Time TRC based on the employee's Workgroup and TRC Program.

REG – Regular Time is reported for all employees. Time Admin translates Reg hours to Payable Time:

- ERGz – for Emergency Hourly Employees
- RGHZ – for Hourly Employees
- RNPz – for Hourly Non-Paid
- RGSz – for Salaried Employees

OVT – OT – Time and Half for relevant employees. Time Admin translates OVT hours to Payable Time:

- OTHz – for Hourly Employees
- OTSz – for Salaried Employees

The 4th Character (z value) will depend on the type of Workgroup:

- Full Approval Workgroup (All Payable Time requires approval)
 - A will be generated for Payable Time Approval
- Partial Approval Workgroup (Scheduled hours for exception reporters generated by Cardinal based on the employee's Work Schedule and Uncompensated Overtime do not require approval; all other hours require approval)
 - A: Payable Time Approval Required
 - X: No Payable Time Approval

Example: SCHX are scheduled hours generated by Cardinal and do not require approval. RGSA are regular hours reported on the timesheet and require approval.
- Interfacing Workgroup
 - X will be generated because Payable Time Approval is not required. Approval for these Workgroups is on Reported Time.

Note: Hours interface as approved time. Reported Time Approval is only needed when hours are keyed on the Timesheet in Cardinal.

Time & Labor Setup Overview (continued)

Manual employee setup steps are required for certain eligibility values and to assign employee Work Schedules. Time Reporter and Comp Plan enrollments may also need to be maintained manually in cases where the employee is an exception to the TL Auto Enrollment criteria.

The Time & Labor Employee Setup Administrator's responsibilities include:

- Reviewing Agency Time Reporter and Comp Plan Enrollment Criteria
- Monitoring TL Auto Enrollment Results
- Reviewing and Resolving TL Auto Enrollment issues
- Monitoring and Maintaining TL Eligibility for Overtime Leave, Shift Differential, and Commuter Imputed Income
- Maintaining TL Bypass
- Maintaining Time Reporter Enrollment and Comp Plan Enrollment
- Monitoring and Maintaining Employee Work Schedules

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process 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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TL Auto Enrollment Overview

Cardinal runs the TL Auto Enrollment process every two hours during the workweek. Cardinal uses the Job Data during the TL Auto Enroll process to assign Time Reporter and Comp Plan values to employees. The following **Job Data** fields are relevant to Time & Labor:

- Business Unit
- Department ID
- HR Status (“Active” or “Inactive”)
- Employee Type (“Salaried” or “Hourly”)
- Fair Labor Standards Act (FLSA) Status (“Exempt” or “Non-Exempt”)
- Pay Group
- Job Code
- Salary Grade
- Employee Class
- Absence System

Inaccurate data values for these fields could result in inaccurate Time Reporter attributes being assigned to the employee during the TL Auto Enrollment process. In these cases, work with Agency Human Resources (HR) to make the required corrections.

In addition, TL Eligibility enrollment impacts the employee’s eligibility for Shift Differential, Commuter Imputed Income, and Overtime Leave.

Changes in Job Data and TL Eligibility, including position changes, new hires, terminations, and Agency transfers, are processed by the TL Auto Enrollment process. For example, terminated employees and employees with an inactive HR status will be assigned to an “Inactive” time reporting group to prevent Timesheets from being submitted or interfaced beyond the date the employee became inactive.



Reviewing Agency Time Reporter and Comp Plan Enrollment Criteria

Time Reporter Data Criteria and Comp Plan Enrollment Criteria Queries:

Time Reporter Data Criteria and Comp Plan Enrollment Criteria queries display values for Time Reporter Data and Comp Plan Enrollment set out by each individual agency. The TL Auto Enrollment process looks at an agency's criteria and an employee's Job Data and determines what values they will receive in Maintain Time Reporter Data and Comp Plan Enrollment.

Sample RTA806 Time Reporter Criteria Query (V_TA_TIME_REPORTER_CRITERIA):

| Priority | Business Unit | Department ID | HR Status | Employee Type | FLSA Status | Pay Group | Job Code | Salary Grade | Employee Class | Shift Differential | Time Reporter | Reporting Template | Workgroup | Allowed Workgroup | Taskgroup | Rule Element 3 | Rule Element 3 Overlay | Rule Element 4 | Rule Element 4 Overlay | Rule Element 5 | Rule Element 5 Overlay |
|----------|---------------|---------------|-----------|---------------|-------------|-----------|----------|--------------|----------------|--------------------|---------------|--------------------|-----------|-------------------|-----------|----------------|------------------------|----------------|------------------------|----------------|------------------------|
| 650 | 5100 | 33000 | A | S | M | SMI | | | | | A | | 3300001 | V140000101 | P0000A | | M | 01.40 | N | 000.00 | N |
| 660 | 5100 | 33000 | A | H | M | (SV) | | | | | A | | 3300001 | V140000101 | P0000A | 100 | H | 01.40 | N | 000.00 | N |
| 665 | 5100 | 33000 | A | S | M | SMI | | | | | A | | 3300001 | V140000101 | P0000A | | M | 01.40 | M | 000.00 | N |

Sample RTA806 Comp Plan Enrollment Criteria Query (V_TA_COMP_PLAN_CRITERIA):

| Priority | Business Unit | Department ID | HR Status | Employee Type | FLSA Status | Pay Group | Job Code | Salary Grade | Employee Class | Absence System | OT Leave Eligible | Time Reporter Status | Comp Plan Enrollment Status | Comp Plan |
|----------|---------------|---------------|-----------|---------------|-------------|-----------|----------|--------------|----------------|----------------|-------------------|----------------------|-----------------------------|------------|
| 650 | 5100 | 33000 | A | S | N | SMI | | | | | | A | A | PAID-OVS |
| 650 | 5100 | 33000 | A | S | N | SMI | | | | | | A | I | OT_LEAVE |
| 650 | 5100 | 33000 | A | S | | SMI | | | AHD | | | A | I | PAID-OVS |
| 665 | 5100 | 33000 | A | S | | SMI | | | | | | A | A | PAID-OVS |
| 350 | STATE | 33000 | A | S | | | | | | AM | | A | A | CARDINAL |
| 360 | STATE | 33000 | A | S | | | | | | AM | | A | A | COMP_LEAVE |
| 360 | STATE | 33000 | A | S | | | | | | OT | | A | A | EARNOT-CCS |
| 360 | STATE | 33000 | A | S | N | | | | | OT | | A | A | EARNOT-DCT |
| 360 | STATE | 33000 | A | S | | | | | | OT | | A | A | NONPROLPG |
| 360 | STATE | 33000 | A | S | | | | | | OT | | A | A | NONPROLPG |
| 345 | STATE | 33000 | A | S | N | | | | | AM | | A | A | PAID-OVS |
| 365 | STATE | 33000 | A | S | | | | | | AM | Y | A | A | OT_LEAVE |
| 360 | STATE | 33000 | A | S | N | | | | | | | A | A | PAID-OVS |
| 363 | STATE | 33000 | A | H | | | | | | | | A | A | PAID-OVS |
| 360 | STATE | 33000 | A | H | N | | | | | | | A | A | PAID-OVT |
| 360 | STATE | 33000 | A | S | N | | | | | | | A | A | PAID-OVT |

For further information about these queries, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.



Monitoring TL Auto Enrollment Results

The Time & Labor Setup Administrator should monitor the TL enrollments for accuracy using the Time Reporter Changes Query and the Comp Plan Enrollment Audit Query. For further information about these queries, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.

Sample RTA109 Time Reporter Changes Query (V_TA_TIME_REPORTER):

V_TA_TIME_REPORTER - Time Reporter Changes

Business Unit: 09900
 Dept ID:
 Employee ID:
 *From Date: 01/01/2023
 *To Date: 01/31/2023
 View Results

Download results in: Excel Spreadsheet CSV Text File XML File (4381 kb)

View All First 1-100 of 5021 Last

| Row | Name | Employee ID | Empl Record | Position Number | Business Unit | Dept ID | HR Status | Changed On | Changed By | Changed Field | Old Value | New Value | Change Effective Date |
|-----|------|-------------|-------------|-----------------|---------------|---------|-----------|-----------------------|----------------------|------------------|-----------|------------|-----------------------|
| 1 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | EMPLID | | | 2023-12-30 |
| 2 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | EMPL_RCD | 0 | 0 | 2023-12-30 |
| 3 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | EFFDT | | 2023-12-30 | 2023-12-30 |
| 4 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | TIME_RPTG_STATUS | A | A | 2023-12-30 |
| 5 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | TIME_RPTG_IND | E | E | 2023-12-30 |
| 6 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | WORKGROUP | INACTIVE | INACTIVE | 2023-12-30 |
| 7 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | TASKGROUP | VACANCY | VACANCY | 2023-12-30 |
| 8 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | TL_TIME_TO_PWF | N | N | 2023-12-30 |
| 9 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | TIMEZONE | EST | EST | 2023-12-30 |
| 10 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | PROCESS_INSTANCE | | | 2023-12-30 |
| 11 | | | 0 | ABCO1014 | 09900 | 111723 | I | 01/07/2023 12:44:01AM | AA_CARDINAL_BATCH_TA | EMPLID | | | 2023-01-29 |

Sample RTA776 Comp Plan Enrollment Audit Query (V_TA_COMP_PLAN_ENROLL_AUDIT):

V_TA_COMP_PLAN_ENROLL_AUDIT - Comp Plan Enrollment Audit

Business Unit: 09900
 Department ID:
 Employee ID:
 *From Date: 01/01/2023
 *To Date: 01/31/2023
 View Results

Download results in: Excel Spreadsheet CSV Text File XML File (381 kb)

View All First 1-100 of 1010 Last

| Row | Employee Name | Employee ID | Employee Record | Position Number | Department ID | Business Unit | HR Status | Comp Time Plan | Comp Plan Effective Status | Comp Plan Effective Date | Username Who made the change | Date and Time Stamp | Audit Action |
|-----|---------------|-------------|-----------------|-----------------|---------------|---------------|-----------|----------------|----------------------------|--------------------------|------------------------------|-----------------------|--------------|
| 1 | | | 0 | ABCO1014 | 111723 | 09900 | I | EARNOT-OCS | I | 12/30/2022 | AA_CARDINAL_BATCH_TA | 01/07/2023 12:44:04AM | A |
| 2 | | | 0 | ABCO1014 | 111723 | 09900 | I | NONPROD_PD | I | 12/30/2022 | AA_CARDINAL_BATCH_TA | 01/07/2023 12:44:04AM | A |
| 3 | | | 0 | ABCO1014 | 111723 | 09900 | I | NONPROD_RQ | I | 12/30/2022 | AA_CARDINAL_BATCH_TA | 01/07/2023 12:44:04AM | A |
| 4 | | | 0 | ABCO1014 | 111723 | 09900 | I | RAID-ONCHP | I | 12/30/2022 | AA_CARDINAL_BATCH_TA | 01/07/2023 12:44:04AM | A |
| 5 | | | 0 | ABCO1JSE | 111723 | 09900 | A | RAID-CALHP | I | 01/14/2023 | AA_CARDINAL_BATCH_TA | 01/20/2023 12:41:59AM | A |
| 6 | | | 0 | ABCO1JSE | 111723 | 09900 | A | RAID-OVT | I | 01/14/2023 | AA_CARDINAL_BATCH_TA | 01/20/2023 12:41:59AM | A |
| 7 | | | 0 | ABCO0059 | 120700 | 09900 | I | EARNOT-OCS | I | 01/13/2023 | AA_CARDINAL_BATCH_TA | 01/14/2023 12:48:44AM | A |
| 8 | | | 0 | ABCO0059 | 120700 | 09900 | I | NONPROD_PD | I | 01/13/2023 | AA_CARDINAL_BATCH_TA | 01/14/2023 12:48:44AM | A |
| 9 | | | 0 | ABCO0059 | 120700 | 09900 | I | NONPROD_RQ | I | 01/13/2023 | AA_CARDINAL_BATCH_TA | 01/14/2023 12:48:44AM | A |
| 10 | | | 0 | ABCO0059 | 120700 | 09900 | I | RAID-ONCHP | I | 01/13/2023 | AA_CARDINAL_BATCH_TA | 01/14/2023 12:48:44AM | A |



Reviewing and Resolving TL Auto Enrollment Issues

If appropriate state or Agency criteria does not exist to assign valid values to an employee based on the employee's Job Data, the employee will be assigned to the "Invalid" Workgroup. The TL Setup Administrator should review the Time Reporter Auto Enrollment Exceptions Query to identify this issue and other enrollment issues. For further information about this Query, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.

Sample RTA715 Time Reporter Auto Enrollment Exceptions Query (V_TA_AUTO_ENROLL_EXC):

| Role | NAME | ID | Empl Record | Position | Type | Unit | Location | Dept ID | Desc | Group | Status | Workgroup | Taskgroup | FLSA Stat | HR Status | REASON |
|------|------|----|-------------|----------|-------|-------|----------|----------------------------|------|-------|-----------|-----------|-----------|-----------|-----------|--------|
| 1 | | | 0 ABCW1RAA | H | 99000 | 10500 | 410600 | Regional 9 Charlottesville | BWS | A | HNR127EP6 | 99000GCCO | N | | | |

The Reason Codes displayed on the RTA715 Time Reporter Auto Enrollment Exceptions Query are used to explain why each employee was identified as an Auto Enrollment exception. The following table provides some of the common Reason Codes and a definition for each.

| Reason Code | Definition |
|-------------|--|
| A | Active Employee in Inactive Workgroup |
| B | Active Employee in Invalid Workgroup |
| C | Active Employee not in a valid Taskgroup |
| D | Active Employee not in a valid Workgroup |
| E | Active Employee with Inactive Time Reporter Status |
| F | Rule Element 3 is missing for Active Hourly Employee |
| G | Rule Element 4 is missing for Active Employee |
| H | Rule Element 5 is missing for Active Salaried Employee |
| I | Inactive Employee not in Inactive Workgroup |
| J | Inactive Employee with Active Time Reporter status for more than 60 days after termination |

The TL Setup Administrator should research and work with an Agency HR Administrator to update Job Data as needed. Consider if the employee needs to be set up as a Time Reporter manually or contact Post Production Support (PPS) if the Agency criteria for TL Auto Enrollment needs to be modified. If Job Data is corrected, the TL Auto Enrollment process will re-evaluate the employee on the next run and update the Time Reporter values.

Monitoring and Maintaining TL Eligibility

TL Eligibility is used to define whether the employee is eligible for Overtime Leave, Shift Differential, or Commuter Imputed Income. TL Eligibility enrollments are manually maintained by the TL Setup Administrator and not by the TL Auto Enrollment process.

The following TL Eligibility values are used to control employee eligibility:

- **Effective Date:** The date the TL Eligibility is effective should match the date of the Job Data or eligibility change that impacts time reporting for the employee
- **Eligibility Type:** The option(s) that the employee is eligible for (Overtime Leave, Shift Differential, and/or Commuter Imputed Income)
 - **Overtime Leave:** Eligibility to report Overtime Leave earned or taken. This is only applicable to Agencies using Cardinal Absence Management and only needed when the Agency does not have Comp Plan enrollment criteria for Overtime Leave

Note: If an Agency does not payout Overtime Leave balances at the time a Salaried employee transfers from Non-Exempt to Exempt, then the employee should be enrolled in the Overtime Leave Eligibility.

- **Shift Differential:** Eligibility to report Shift Differential
 - **Step:** Identifies the Shift Type and Shift 2 / Shift 3 / Shift 4 / Shift 5 rates. The fields display based on the Step selected and are not editable. Shift Step/Rate configuration is done by the Cardinal Post Production Support (PPS) team
 - **Shift Type:** Amount or percentage
 - **Shift 2:** Rate applied when Shift 2 is selected on the Timesheet
 - **Shift 3:** Rate applied when Shift 3 is selected on the Timesheet
 - **Shift 4:** Rate applied when Shift 4 is selected on the Timesheet
 - **Shift 5:** Rate applied when Shift 5 is selected on the Timesheet
 - **Include Shift** checkbox is not used by Cardinal.
 - Overtime is always included in Shift calculation



- **Commuter Imputed Income:** Cardinal supports automatic daily rate calculations for Commuter Imputed Income for eligible employees at Agencies with a permanently assigned state vehicle used to commute to and from work. The Commuter Imputed Income rule will generate one day's imputed income on any day where regular hours were worked and no telework code was indicated on the Timesheet. This one day's rate will be applied in payroll to increase the employee's taxable gross based on the approved rate for the current year. Employees must be manually enrolled in TA Commuter Imputed Income.

Note: Agencies using Payroll Additional Pay for earnings code CCR – Company Car should not enroll employees in TA Commuter Imputed income.

- **Status:** The eligibility status indicates whether the employee is eligible for the Eligibility Type
 - **A:** Active
 - **I:** Inactive

The TL Setup Administrator should frequently validate the TL Eligibility enrollments for accuracy using the Active TL Eligibility Query and the TL Eligibility Audit Query. For further information about these Queries, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.

Sample RTA779 Active TL Eligibility Query (V_TA_ELIGIBILITY_ENROLL_LIST):

V_TA_ELIGIBILITY_ENROLL_LIST - Active TL Eligibility

*Business Unit: 99000
 Dept ID
 Empid
 TL Eligibility Type
 *As Of Date: 11/30/2022
 View Results

Download results in: Excel Spreadsheet CSV Text File XML File (1 kb)

View All First 1-4 of 4 Last

| Row | Employee Name | Employee ID | Employee Record | Position Number | JOB Business Unit | Department ID | HR Status | Employee Type | FLSA Status | Employee Class | Job Code | TL Eligibility Type | CDWA Eligibility Effective Date | Eligibility Business Unit | Step | RateType | Include Overtime | Step 2 Rate | Step 3 Rate | Action |
|-----|---------------|-------------|-----------------|-----------------|-------------------|---------------|-----------|---------------|-------------|----------------|----------|---------------------|---------------------------------|---------------------------|------|----------|------------------|-------------|-------------|--------|
| 1 | DOE, JOHN | 00201490000 | 0 | ABC00212 | 99000 | 420712 | A | S | N | ONC | 96013 | SHIFT | 07/10/2022 | 99000 | 6 | A | Y | 0.000 | 2.250 | VERIFY |
| 2 | DOE, JOHN | 00280450000 | 0 | ABC00019 | 99000 | 420712 | A | S | N | ONC | 96014 | SHIFT | 07/10/2022 | 99000 | 5 | A | Y | 0.000 | 2.380 | VERIFY |
| 3 | DOE, JOHN | 00442918700 | 0 | ABCW11Y1 | 99000 | 420712 | A | H | N | GNW | W06013 | SHIFT | 08/10/2021 | 99000 | 1 | A | Y | 0.000 | 1.510 | VERIFY |
| 4 | DOE, JOHN | 00604386300 | 0 | ABC00143 | 99000 | 420712 | A | S | N | ONC | 96013 | SHIFT | 07/10/2022 | 99000 | 7 | A | Y | 0.000 | 1.700 | VERIFY |

Sample RTA777 TL Eligibility Audit Query (V_TA_ELIGIBILITY_ENROLL_AUDIT):

V_TA_ELIGIBILITY_ENROLL_AUDIT - TL Eligibility Audit

*Business Unit: 99000
 Dept ID (Blank for all)
 Employee ID (Blank for all)
 *From Date: 01/01/2023
 *To date: 09/15/2023
 View Results

Download results in: Excel Spreadsheet CSV Text File XML File (1 kb)



View All First 1-3 of 3 Last

| Row | Employee Name | Employee ID | Employee Record | Position Number | Department ID | Business Unit | HR Status | Custom TL Eligibility Type | Eligibility Effective Date | Eligibility Effective Status | Step | Username who made the change | Date and Time Stamp | Audit Action: Add, Delete, Change |
|-----|---------------|-------------|-----------------|-----------------|---------------|---------------|-----------|----------------------------|----------------------------|------------------------------|------|------------------------------|----------------------|-----------------------------------|
| 1 | DOE, JOHN | 00280450000 | 0 | ABC00019 | 420712 | 99000 | A | SHIFT | 06/10/2023 | A | 9 | 8 BX01250 | 06/20/2023 4:05:45PM | Add |
| 2 | DOE, JOHN | 00804386300 | 0 | ABC00143 | 420712 | 99000 | A | SHIFT | 06/10/2023 | A | 8 | 8 BX01250 | 06/20/2023 4:06:11PM | Add |
| 3 | DOE, JOHN | 00231490000 | 0 | ABC00212 | 420712 | 99000 | A | SHIFT | 06/10/2023 | A | 10 | 8 BX01250 | 06/20/2023 4:06:33PM | Add |

Maintaining TL Eligibility

Follow the steps in this section to learn about how to view the **TL Eligibility** page.

| Step | Action |
|---|---|
| 1. | Navigate to the TL Eligibility page using the following path: Menu > Time and Labor > Enroll Time Reporters > Eligibility |
| <p>The Eligibility Search page displays.</p> <div data-bbox="414 611 1222 1381" style="border: 1px solid black; padding: 10px;"> <p>Eligibility</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <p>▼ Search Criteria</p> <p> Business Unit begins with <input type="text"/> </p> <p> Empl ID begins with <input type="text"/> </p> <p> Empl Record = <input type="text"/> </p> <p> First Name begins with <input type="text"/> </p> <p> Last Name begins with <input type="text"/> </p> <p> <input type="checkbox"/> Case Sensitive </p> <p> Limit the number of results to (up to 300): <input type="text" value="300"/> </p> <p> <input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search <input type="button" value="Save Search Criteria"/> </p> </div> | |
| 2. | Enter the applicable Business Unit in the Business Unit field. <div data-bbox="256 1472 911 1612" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>▼ Search Criteria</p> <p> Business Unit begins with <input type="text"/> </p> </div> |
| 3. | Enter the applicable employee's Employee ID or known portion of the Employee ID in the Empl ID field. <div data-bbox="256 1734 919 1822" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p> Empl ID begins with <input type="text"/> </p> </div> |

| Step | Action |
|---|--|
|  | Users can also search for the employee by the name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. |
| 4. | Enter the employee's Employee Record in the Empl Record field.  |
| 5. | Click the Search button.  |

The Eligibility Search page displays.

Eligibility


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

▼ **Search Criteria**


Business Unit begins with ▼
Empl ID begins with ▼
Empl Record = ▼
First Name begins with ▼
Last Name begins with ▼

Case Sensitive

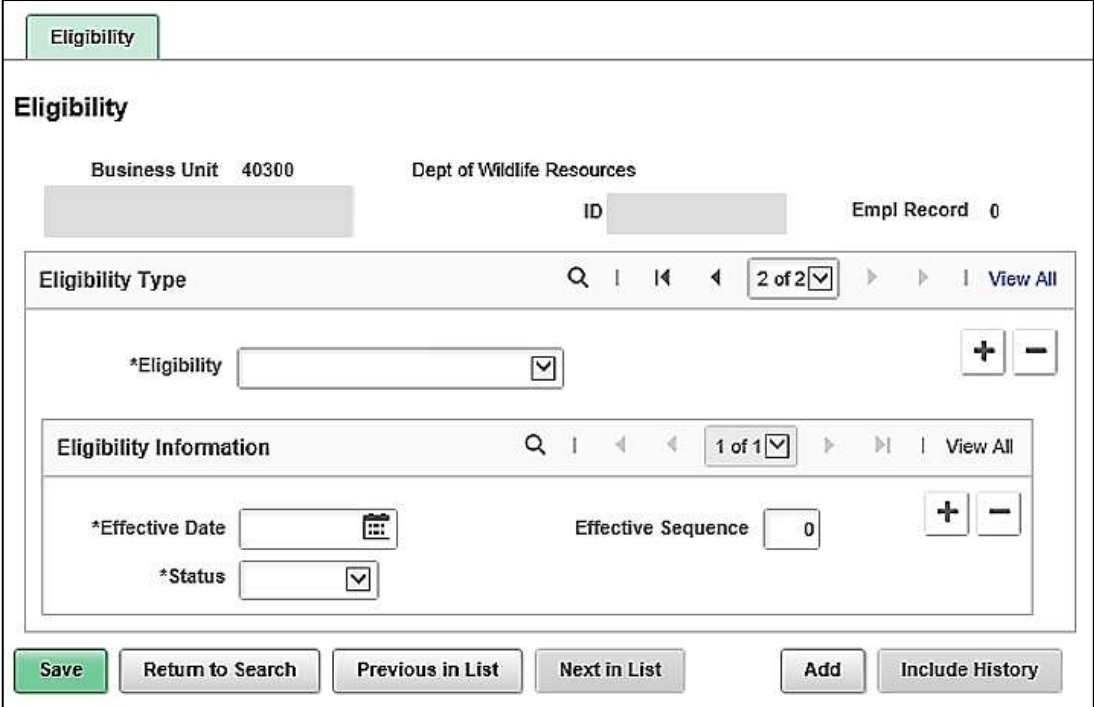

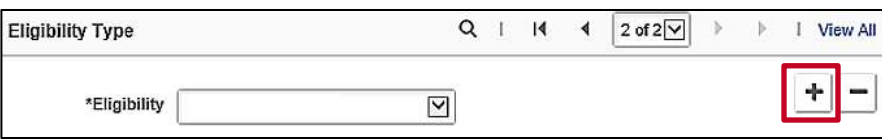
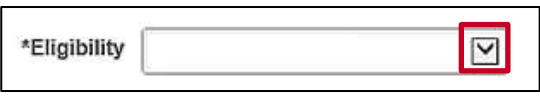
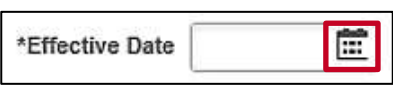
Limit the number of results to (up to 300):




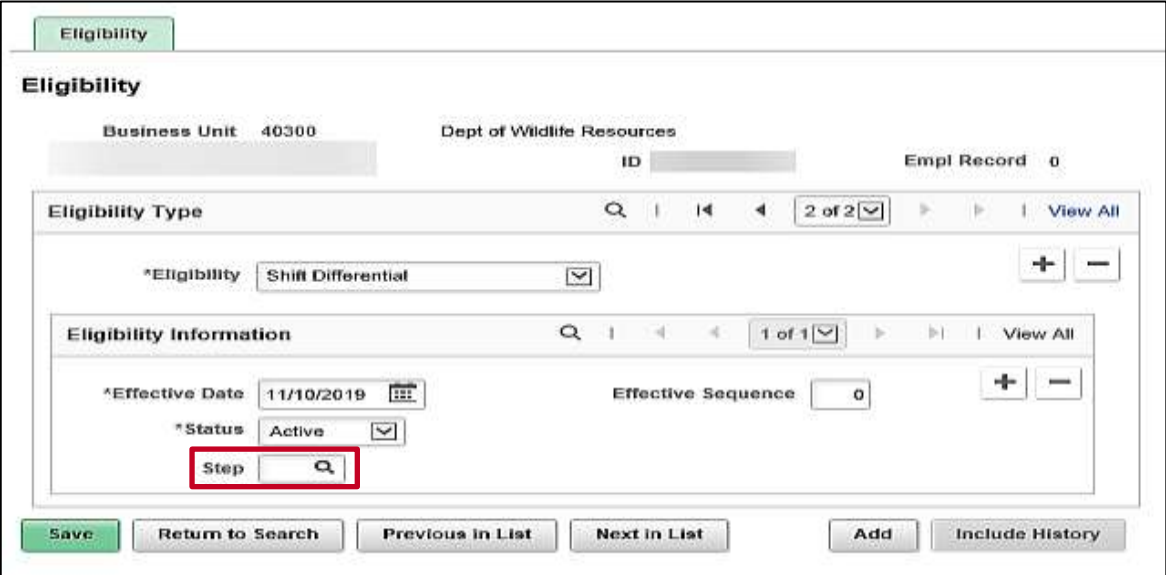

[Basic Search](#)

[Save Search Criteria](#)

No matching values were found.

| | |
|---|--|
|  | If the search results display “No matching values were found”, click the Add a New Value tab. |
|---|--|

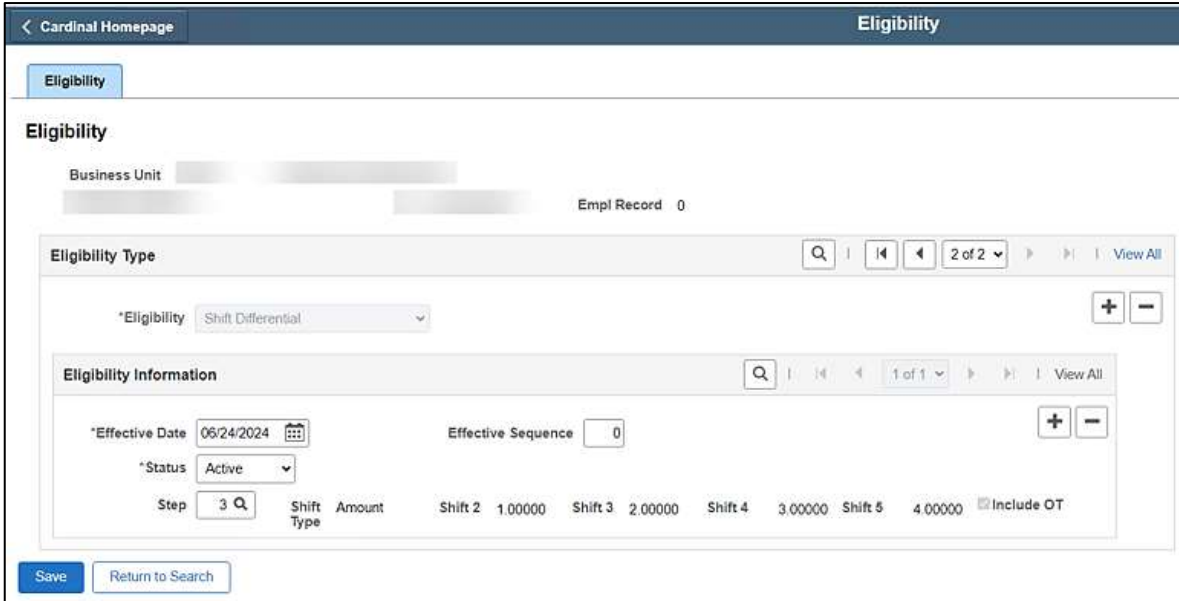
| Step | Action |
|------|--|
| | <p>The Add a New Value tab displays.</p> <div data-bbox="521 378 1114 1079" style="border: 1px solid black; padding: 10px;"> <p>Eligibility</p> <p> <input type="button" value="Find an Existing Value"/> <input type="button" value="Add a New Value"/> </p> <p>*Business Unit <input type="text" value=""/> <input type="button" value="Q"/></p> <p>*Empl ID <input type="text" value=""/> <input type="button" value="Q"/></p> <p>Empl Record <input type="text" value=""/> <input type="button" value="Q"/></p> <p><input type="button" value="Add"/></p> <p> Find an Existing Value Add a New Value </p> </div> |
| 6. | <p>Confirm that the Business Unit, Empl ID, and Empl Record fields are correct.</p> <div data-bbox="272 1167 753 1415" style="border: 1px solid black; padding: 5px;"> <p>*Business Unit <input type="text" value=""/> <input type="button" value="Q"/></p> <p>*Empl ID <input type="text" value=""/> <input type="button" value="Q"/></p> <p>Empl Record <input type="text" value=""/> <input type="button" value="Q"/></p> </div> |
| 7. | <p>Click the Add button.</p> <div data-bbox="266 1507 493 1591" style="border: 1px solid black; padding: 5px; text-align: center;"> <p><input type="button" value="Add"/></p> </div> |


| Step | Action |
|---|--|
| | <p>The Eligibility page displays for applicable employee.</p>  |
| 8. | Review and confirm any existing eligibility for the employee. |
|  | <p>If all eligibility type(s) are correct, then no additional action is required. If additional eligibility needs to be added, proceed to the next step.</p> |
| 9. | <p>Click the Add a New Row (+) icon.</p>  |
| 10. | <p>Select the applicable type of Eligibility using the Eligibility field dropdown button.</p>  |
| 11. | <p>Enter the applicable date in the Effective Date field or select the applicable date using the Effective Date Calendar icon.</p>  |

| Step | Action |
|---|---|
| 12. | Click the Status field dropdown button and select the “Active” list item.  |
|  | If the Eligibility Type is “Shift Differential”, continue with Step 13. |
| 13. | If eligibility is “Overtime” or “Commuter Imputed Income”, click the Save button.  |
| The Eligibility page refreshes and the Step field displays when “Shift Differential” is selected. | |
|  | |
| 14. | Select the applicable Step using the Step Look Up icon.  |

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

The Eligibility page refreshes and displays the detailed information for the selected Step.



| | |
|-----|--|
| 15. | <p>Click the Save button.</p>  |
|-----|--|

Time Reporter Data

The Time Reporter enrollment controls the time reporting attributes associated with the employee including Timesheet fields, values, and the business rules applied during Timesheet entry/processing. The TL Auto Enrollment process assigns effective dated Time Reporter values on the **Maintain Time Reporter Data** page.

Note: The Agency Criteria is used by TL Auto Enrollment to enroll the employee. If an override is needed, refer to the [Maintaining TL Bypass Auto Enroll](#) section of this Job Aid.

The following **Time Reporter Data** fields are used in Cardinal:

- **Effective Date:** The date the Time Reporter enrollment is effective. This date should match the date of the Job Data or eligibility change that impacts time reporting (hire, termination, transfer, position change, etc.)
- **Status:** Employee status indicating if time can be reported either on the Timesheet directly or via interfaces:
 - **A:** Active
 - **I:** Inactive (employee is terminated or will not have time or absences reported in Cardinal online or via interface)

Workgroup: Represents a group of employees that share compensation and rule processing requirements for time reporting, FLSA reporting, and approvals. The Workgroup is a 9-character acronym where each value identifies a characteristic for the Time Reporter (employee). The following table provides the definition and possible values for each character:

| Character | Defines | Values |
|-----------------------------------|--------------------|--|
| 1 st | Employee Type | H = Hourly, S = Salaried |
| 2 nd | FLSA Status | N = Nonexempt, E = Exempt |
| 3 rd | Employee Category | 1 = Type 1, 2 = Type 2, 3 = Type 3 A = Additional Pay Only, P = Per Diem Type R = Regular, M = Emergency, J = Judge, L = Law Enforcement F = Fire Prevention, S = Student |
| 4 th | Approval Type | I = Reported Time for Interfaced F = Payable Time for Online Full Approval P = Payable Time for Online Partial Approval |
| 5 th – 6 th | FLSA Period | 07 , 12 , 21 , 28 Days |
| 7 th | Pay Cycle | B = Biweekly, 1 = SM1, 2 = SM2, M = Monthly |
| 8 th | Time Reporter Type | E = Exception, P = Positive |
| 9 th | FLSA Start Day | 1 = Sun, 2 = Mon, 4 = Wed, 6 = Fri, 7 = Sat |



Workgroup Examples

| Salaried Workgroup: SERP071E6 | Hourly Workgroup: HNRFP07BP1 |
|----------------------------------|---------------------------------|
| Salaried | Hourly |
| Exempt | Non-Exempt |
| Regular | Regular |
| P = Online Partial Approval | F = Online Full Approval |
| 07 = FLSA Period = 07 Days | 07 = FLSA Period = 07 Days |
| 1 = Pay Cycle Semi-Monthly 1 | B = Pay Cycle Biweekly |
| E = Exception Time Reporter | P = Positive Time Reporter |
| 6 = FLSA Start Day Friday | 1 = FLSA Start Day Sunday |

Taskgroup: Represents a group of employees that share time and task reporting requirements impacting the available Timesheet fields. This is a Time Reporter value that defines the Timesheet template used to collect and process time for the employee. The Taskgroup name can be used to quickly identify Timesheet characteristics. The following table provides a breakdown of the Taskgroup characters and examples:

| Taskgroup (XXXXX is the Business Unit) | Online or Interfacing Employee | ChartFields | User Field 4 |
|---|--|---------------|-----------------------|
| XXXXXBA | Online | Not Available | Not Available |
| XXXXXCCOP | Online | Optional | Not Available |
| XXXXXCCRQ | Online | Required | Not Available |
| XXXXXICCO | Interfacing | Optional | Interface Filename |
| XXXXXICCR | Interfacing | Required | Interface Filename |
| XXXXXIN | Interfacing | Not Available | Interface Filename |
| VANONE | Only used when the employee is enrolled in the INACTIVE or INVALID Workgroups | | |

- **Rule Element 3:** Indicates the Hourly ACA Yearly Limit in Hours used to generate exceptions for the 90% warning and hours exceeded error (annual limit can be overridden if allowed). For instructions on updating the Hourly ACA Yearly Limit, refer to the [Adjusting Hourly ACA Yearly Limit](#) section of this Job Aid

- **Rule Element 4:** Indicates the overtime limit or threshold for reporting overtime and rule validation for the eligibility of overtime
 - **Format:** NN:MMM
 - **NN** = FLSA Period Days (e.g., 07, 14, 21, 28)
 - **MMM** = the number of hours that should be worked before overtime should be reported

- **Rule Element 5:** Indicates the Compensatory and Overtime Leave Plan limits for maximum hours allowed in balance. This field is only used for employees/agencies using Cardinal Absence Management:
 - **Format:** AAA:BBB
 - **AAA** = Compensatory Leave Plan limit
 - **BBB** = Overtime Leave Plan limit

In addition, TL Eligibility enrollment impacts the employee's eligibility for Shift Differential, Commuter Imputed Income, and Overtime Leave.

Changes in Job Data and TL Eligibility, including position changes, new hires, terminations, and Agency transfers, are processed by the TL Auto Enrollment process. For example, terminated employees and employees with an inactive HR status will be assigned to an "Inactive" time reporting group to prevent Timesheets from being submitted or interfaced beyond the date the employee became inactive.

TL Bypass Auto Enroll Overview

Agencies can bypass the TL Auto Enroll process for an employee and maintain the employee's Time Reporter data and/or Comp Plans manually using the TL Bypass Auto Enroll feature. The TL Auto Enroll process checks the TL Bypass Auto Enroll selections to determine if the employee should be skipped from the default Time Reporter and/or Comp Plan enrollment processing. Generally, the TL Bypass feature should not be used unless the TL Auto Enroll process did not enroll the employee appropriately and there are no criteria that could be configured for the Agency to identify and enroll the employee as needed.

Any Time Reporter Data or Comp Plan enrollments that are manually updated, except for the few exceptions noted at the end of this section, require the employee to be set up for TL Bypass by the TL Setup Administrator to preserve the manual updates. Otherwise, the TL Auto Enrollment process will overwrite the manual changes with the default values based on state and Agency criteria. If an employee is set for bypass, all Time Reporter and/or Comp Plan values must be maintained manually for the employee. It is recommended to deactivate TL Bypass for employees when there is no longer a need for bypass or upon termination to ensure that the TL Auto Enrollment process does not bypass the employee if later rehired.

Use of the TL Bypass Auto Enroll feature should be rare. If it is being used frequently, the Agency should consider contacting PPS to review their Agency criteria. Ideally, Agency criteria can be added or modified to appropriately identify employees for default Time Reporter and Comp Plan enrollments.

The following TL Bypass fields are used in Cardinal:

- **Effective Date:** Indicates the date on which the TL Bypass becomes effective for the employee
- **Bypass Time Reporter Data:** Selection of this **Select** checkbox option is used to indicate that the TL Auto Enroll process will bypass Time Reporter enrollment (Workgroup, Taskgroup, and Rule Elements) for the employee. If selected, these data values will need to be manually updated and maintained by the TL Employee Setup Administrator, to include when updates are needed based on Job Data changes, for the employee

Bypass Comp Plan: Selection of this **Select** checkbox option is used to indicate that the TL Auto Enroll process will bypass Comp Plan enrollment for the employee. If selected, the Comp Plans will need to be manually updated and maintained by the TL Employee Setup Administrator, to include when updates are needed based on Job Data changes, for the employee. The following are examples of valid reasons to use the TL Bypass Auto Enroll feature for an employee:

- The Agency does not offer Compensatory Leave as a general business practice for their employees. However, an individual employee could be granted Compensatory Leave on a case by case basis. To do so, the employee would be set up with the TL Bypass Auto Enroll feature (Bypass Comp Plan selection) by the TL Setup Administrator and then the employee would be enrolled in the Compensatory Leave plan manually

- The Agency does not pay overtime to Salaried Exempt employees as a general business practice. However, an individual employee could be made eligible for paid overtime in certain emergency situations or other special circumstances. To do so, the employee would be set up with the TL Bypass Auto Enroll feature (Bypass Comp Plan selection) by the TL Setup Administrator and then the employee would be enrolled in the applicable paid overtime plan manually

Use of the TL Bypass Auto Enroll feature is not necessary in the following cases:

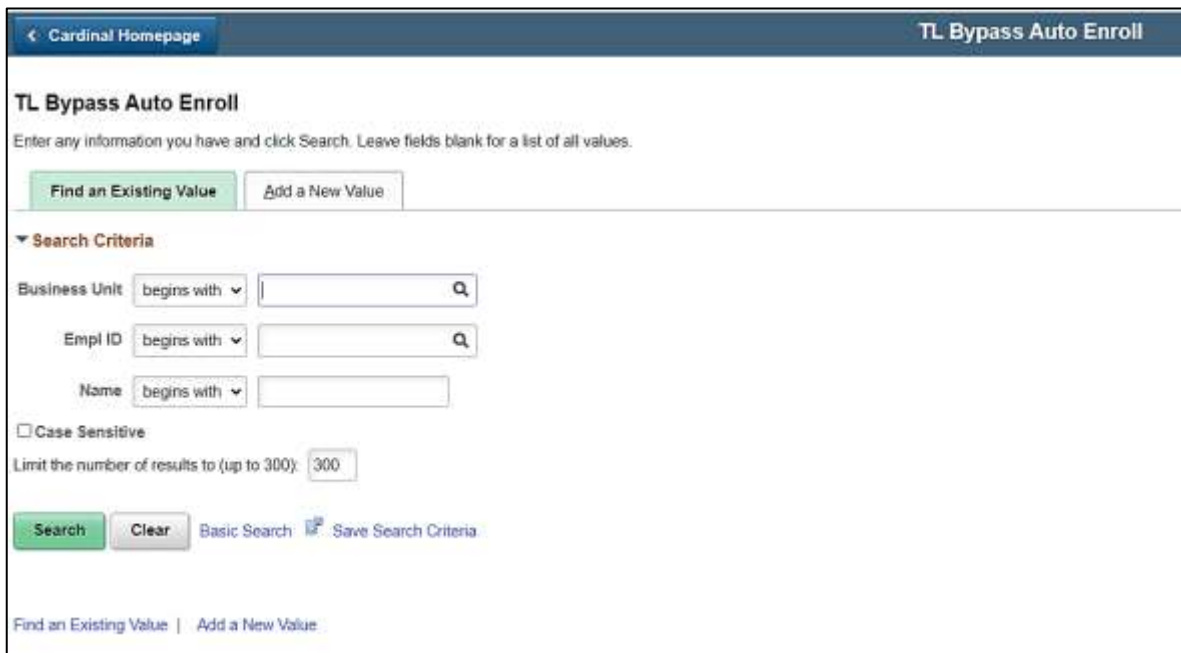
- When manual updates are required to the 4th character of the Workgroup. This value can be manually changed from “P” to “F” or from “F” to “P” to change between partial and full approval for the employee without using the TL Bypass Auto Enroll feature
- When manual updates are required to the 8th character of the Workgroup. This value can be manually changed from “E” to “P” to change an employee from an Exception Time Reporter to a Positive Time Reporter without using the TL Bypass Auto Enroll feature
- The Hourly ACA Yearly Limit in Hours value within the **Rule Element 3** field can be manually updated (to increase or decrease the default limit) for hourly employees without using the TL Bypass Auto Enroll feature




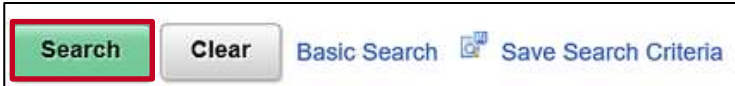
Maintaining TL Bypass Auto Enroll

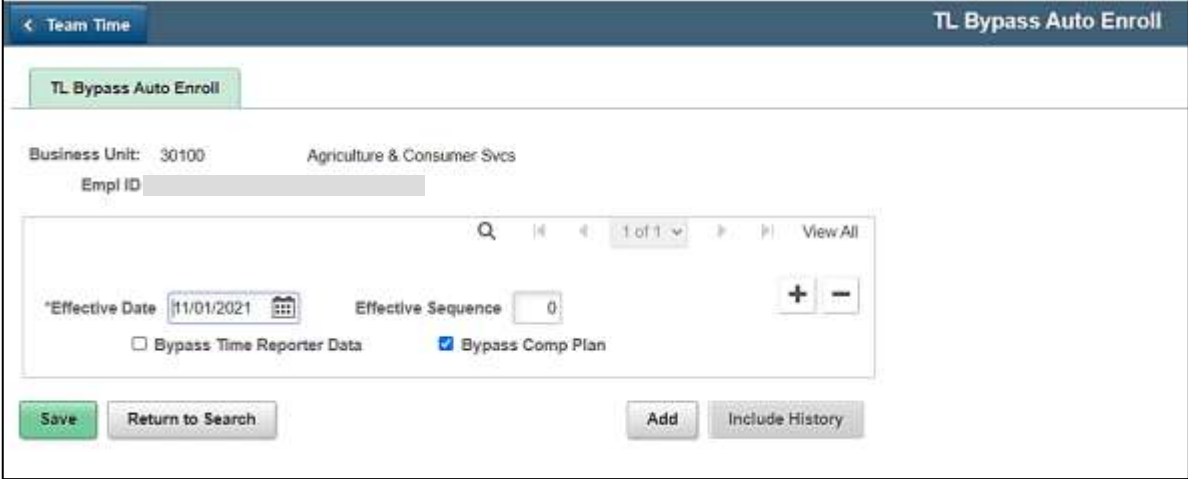

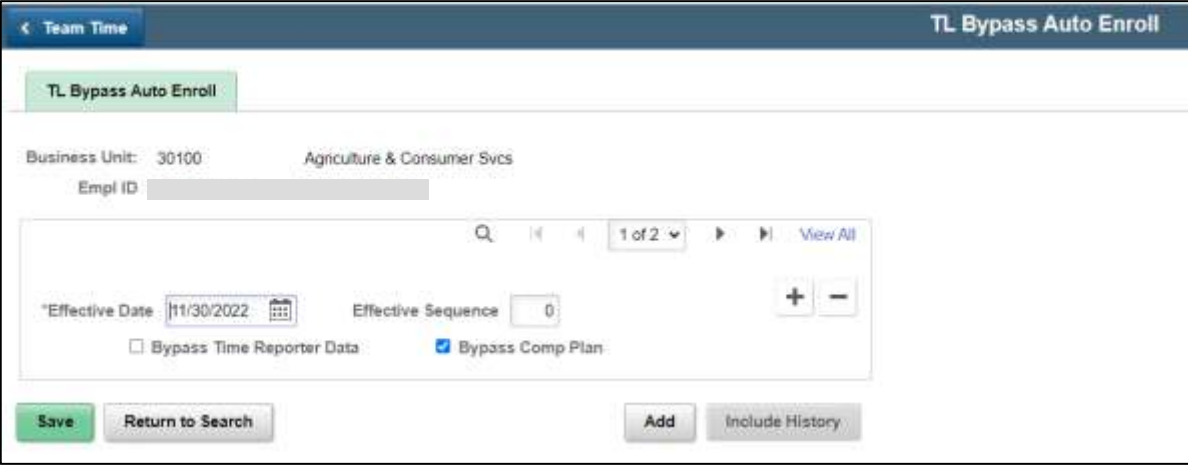


Follow the steps in this section to learn about how to view the **TL Bypass Auto Enroll** page.




| Step | Action |
|------|--|
| 1. | Navigate to the TL Bypass Auto Enroll page using the following path: Menu > Time and Labor > Enroll Time Reporters > TL Bypass Auto Enroll |

The **TL Bypass Auto Enroll Search** page displays.

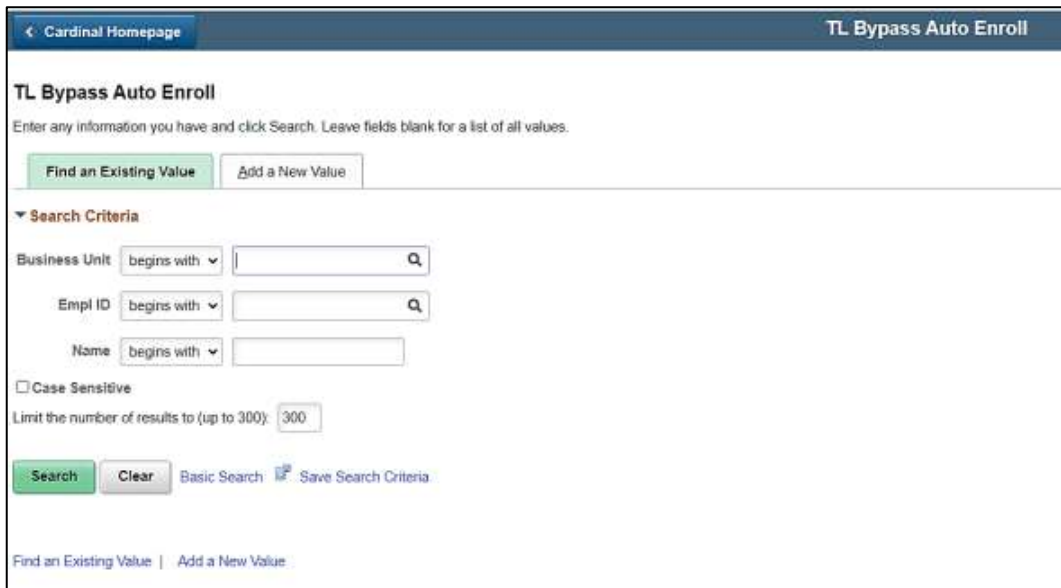


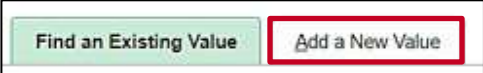
| | |
|---|---|
|  | If you are updating existing TL Bypass Auto Enroll selections for an employee, proceed to Step 2. If you are setting up new TL Bypass Auto Enroll for an employee, proceed to Step 8. |
| 2. | Enter the applicable employee's Employee ID or known portion of the Employee ID in the Empl ID field.  |
|  | Users can search for an employee by name using the Name field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. |
| 3. | Click the Search button.  |





| Step | Action |
|---|---|
| | <p>The TL Bypass Auto Enroll page displays for the applicable employee.</p>  |
| 4. | <p>First, create a new effective dated row. Click the Add a New Row icon (+).</p>  |
| | <p>The page refreshes with a new effective date row.</p>  |
|  | <p>The previous TL Bypass Auto Enroll selections are carried over into the new effective dated row.</p> |
| 5. | <p>The Effective Date field defaults to the current date. Update the date as needed using the Effective Date Calendar icon.</p>  |

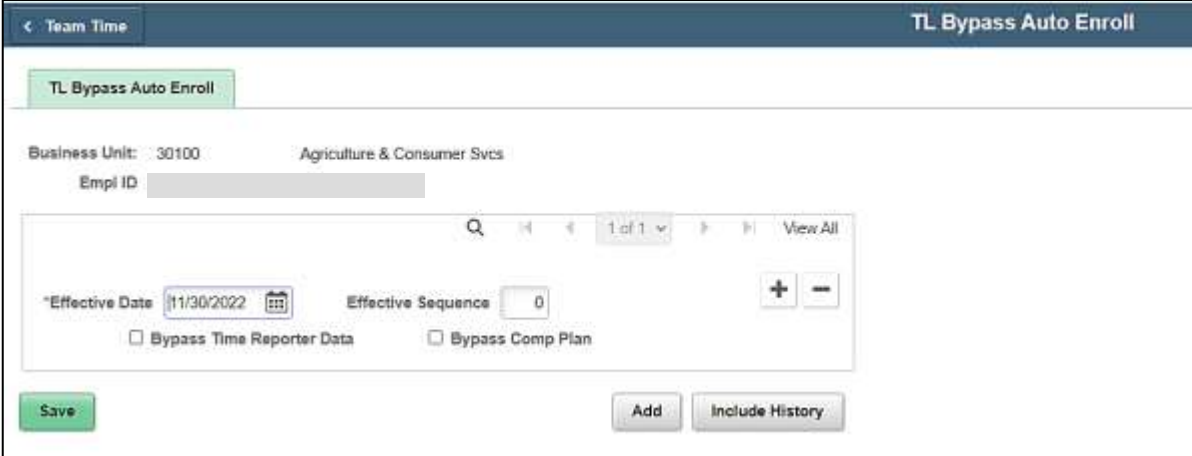

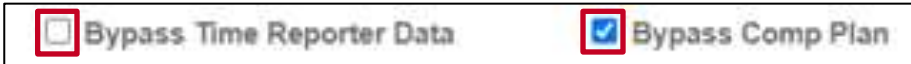


| Step | Action |
|---|--|
| 6. | Update the TL Bypass Auto Enroll selections as needed by either selecting or de-selecting the Bypass Time Reporter Data option and/or Bypass Comp Plan checkbox options.  |
| 7. | Click the Save button.  |
|  | The process for updating the existing TL Bypass Auto Enroll selections for an employee is complete. |

The TL Bypass Auto Enroll page displays.



| | |
|----|--|
| 8. | Click the Add a New Value tab.  |
|----|--|

| Step | Action |
|------|---|
| | <p>The Add a New Value tab displays.</p>  |
| 9. | <p>Enter or select the Agency's Business Unit in the Business Unit field.</p>  |
| 10. | <p>Enter or select the applicable employee's Employee ID in the Empl ID field.</p>  |
| 11. | <p>Click the Add button.</p>  |

| Step | Action |
|---|---|
| | <p>The TL Bypass Auto Enroll page displays for the applicable employee.</p>  |
| 12. | <p>The Effective Date field defaults to the current date. Update this date as needed using the Effective Date Calendar icon.</p>  |
| 13. | <p>Select the applicable TL Bypass Auto Enroll selections by selecting the Bypass Time Reporter Data checkbox and/or the Bypass Comp Plan checkbox options.</p>  |
| 14. | <p>Click the Save button.</p>  |
|  | <p>The process for setting up the new TL Bypass Auto Enroll selections is complete.</p> <p>To inactivate a TL Bypass Auto Enroll, add a new row with the needed Effective Date, uncheck the Auto Enroll that no longer should be bypassed, and then click the Save button.</p> |

Maintaining Time Reporter Data

Any changes to these values that do not align with the employee’s Job Data and agency criteria will be overwritten by the TL Auto Enrollment process.

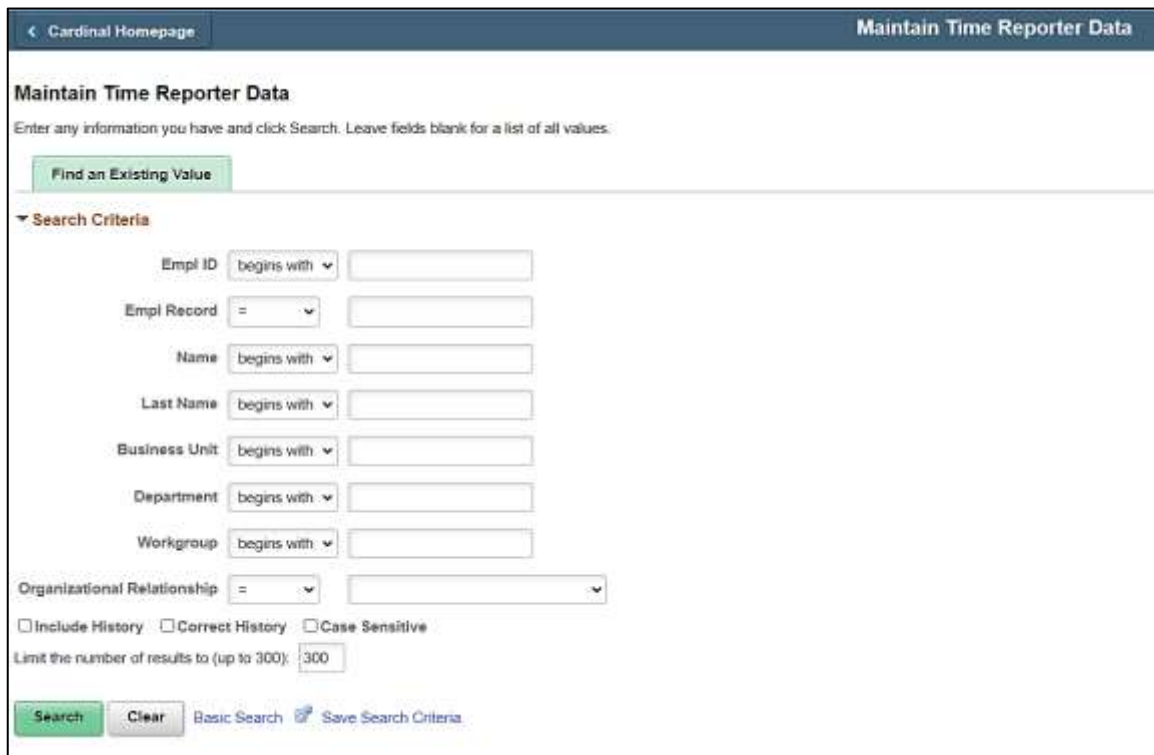
The following manual updates are not impacted by the TL Auto Enrollment process:

- The 4th character of the Workgroup can be manually changed from “P” to “F” or from “F” to “P” to change between partial and full approval for the employee
- The 8th character of the Workgroup can be manually changed from “E” to “P” to change an employee from an Exception Time Reporter to a Positive Time
- The Hourly ACA Yearly Limit in Hours value within the **Rule Element 3** field can be manually updated (to increase or decrease the default limit) for hourly employees


Follow the steps in this section to learn about how to view the **Maintain Time Reporter Data** page.

| Step | Action |
|------|--|
| 1. | Navigate to the Maintain Time Reporter Data page using the following path: Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data |

The **Maintain Time Reporter Data Search** page displays.



The screenshot shows the 'Maintain Time Reporter Data' search interface. At the top, there is a navigation bar with '< Cardinal Homepage' and 'Maintain Time Reporter Data'. Below this, the title 'Maintain Time Reporter Data' is displayed, followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A green button labeled 'Find an Existing Value' is present. Under the 'Search Criteria' section, there are several search fields: 'Empl ID' (dropdown: 'begins with'), 'Empl Record' (dropdown: '='), 'Name' (dropdown: 'begins with'), 'Last Name' (dropdown: 'begins with'), 'Business Unit' (dropdown: 'begins with'), 'Department' (dropdown: 'begins with'), 'Workgroup' (dropdown: 'begins with'), and 'Organizational Relationship' (dropdown: '='). Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. A text input field for 'Limit the number of results to (up to 300):' is set to '300'. At the bottom, there are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

| Step | Action |
|---|---|
| 2. | Enter the applicable employee's Employee ID or known portion of the Employee ID in the Empl ID field. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Empl ID <input type="text" value="begins with"/> <input style="border: 2px solid red;" type="text"/> </div> |
|  | Users can also search for the employee by the Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. |
| 3. | Click the Search button. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Search Clear Basic Search Save Search Criteria </div> |

The **Maintain Time Reporter Data** page displays for the applicable employee.

Maintain Time Reporter Data

Organizational Relationship Employee
ID
Employment Record 0

Badge Detail
Group Membership

Time Reporter Data 1 of 1 | View All

*Effective Date

*Time Reporter Type

Elapsed Time Template

Punch Time Template

Time Period ID

*Workgroup Sal NE Fri07 Full Pos Law

*Taskgroup GIF CC Optional

Task Profile ID

TCD Group

Restriction Profile ID

Rule Element 1

Rule Element 2

Rule Element 3

Rule Element 4 40 hours per week

Rule Element 5 Comp n/a + 40 hr OT Limits

Time Zone Eastern Time (US)

*Status

Payroll

Send Time to Payroll


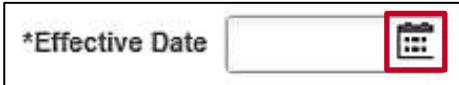



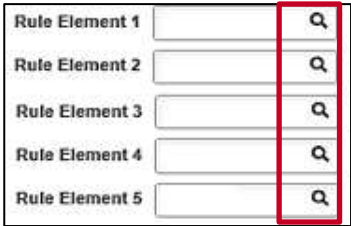

Commitment Accounting

For Taskgroup

For Department

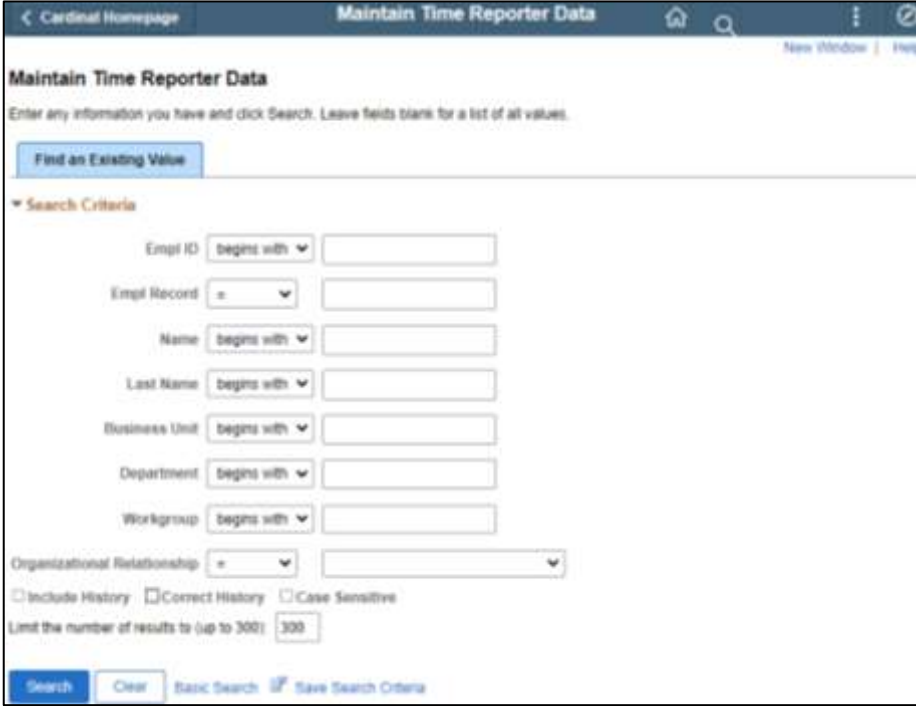


Save
Return to Search
Notify
Refresh
Update/Display
Include History

| | |
|----|---|
| 4. | Review the Time Reporter Data as needed. If updates are required, proceed to the next step. |
|----|---|

| Step | Action |
|------|--|
| 5. | Click the Add a New Row icon (+) to insert a new row.  |
| 6. | Update the effective date to the date for the change to become effective using the Effective Date Calendar icon.  |
| 7. | Update the Status field using the dropdown button as needed.  |
| 8. | Select the applicable Workgroup using the Workgroup Look Up icon as needed.  |
| 9. | Select the applicable Taskgroup using the Taskgroup Look Up icon as needed.  |
| 10. | Update the Rule Element fields as needed using the corresponding Look Up icons.  |
| 11. | Click the Save button once all required updates are made.  |

Adjusting Hourly ACA Yearly Limit

Rule Element 3 on Maintain Time Reporter Data defines the Yearly Limit for hourly employees. This value is initially populated for hourly employees by the TL Auto Enroll process based on defined agency Time Reporter criteria and is intentionally set to a value less than 1,500 by default to allow for sufficient warning. The default limit can be increased or decreased for individual employees. If the Yearly Limit is set below 1,500 hours, it can be adjusted up to 1,500 on the Maintain Time Reporter Data page by a TL Employee Setup Administrator by following the steps below.

| Step | Action |
|---|---|
| 1. | Navigate to the Maintain Time Reporter Data page using the following path: Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data |
| <p>The Maintain Time Reporter Data Search page displays.</p>  | |
| 2. | Enter the applicable employee's Employee ID or known portion of the Employee ID in the Empl ID field.  |
|  | Users can also search for the employee by the Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. |


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





The **Maintain Time Reporter Data** page displays for the applicable employee.

| | |
|----|---|
| 4. | Click the Add a New Row icon (+) to add a new effective dated Row. |
|----|---|



| | |
|---|--|
|  | The Effective Date field will default to the system date. Be sure to update the Effective Date as needed. Cardinal recommends using the FLSA Period Begin Date as the Effective Date to avoid users receiving the Mid-Period Time Reporter message when entering their time. Submit a ticket to the PPS TA Team if a mass update is needed to adjust ACA Hours. |
|---|--|

| Step | Action |
|------|---|
| 5. | Update the Rule Element 3 value as appropriate (up to 1500).  |
| 6. | Click the Save button.  |



Maintaining Comp Plan Enrollment

Any changes to these values that do not align with the employee’s Job Data and agency criteria will be overwritten by the TL Auto Enrollment process.

Comp Plan enrollment controls the Time Reporting Codes (TRCs) available for reporting or interfacing on the employee’s Timesheet. Additionally, it controls the eligibility for TRCs that are translated or generated during Timesheet processing. TL Auto Enroll assigns effective dated Comp Plans on the **Compensatory Plan Enrollment** page.

The following **Time Reporter Data** fields are used in Cardinal:

- **Effective Date:** The date the Comp Plan enrollment is effective. This date should match the date of the Job Data or eligibility change that impacts time reporting (hire, termination, transfer, position change, etc.)
- **Compensatory Time Plan:** The Comp Plan that the employee is enrolled in that gives the employee access to specified TRCs. Some plans include access to multiple TRCs. The following table provides the TRCs available to be reported or interfaced on the Timesheet based on the Comp Plan that the employee is enroll in:

| Comp Time Plan | TRCs available on Timesheet | TRC Descriptions |
|----------------|--|--|
| CARDINAL | HOLM, HNPM, HOS, CLO | Holiday, Holiday Pay Docking, Holiday Straight Extra, Office Closing |
| COMP_LEAVE | CALHE, CCA, CCD, CCL, CPO, ECHS, HCS, OCS, ONCHE | Comp Leave Earned, Comp Leave Taken, Comp Time Leave Payout, Comp Time Leave Adjust, Comp Time Leave Deduction, Comp Time Leave Adjust CNV, Holiday Straight Earned, for employees using Cardinal Absence Management |
| OT_LEAVE | CALHE, ECT, OCA, OCD, OCL, OCT, OPO | Overtime Leave Earned, Overtime Leave Taken, Overtime Leave Payout, Overtime Leave Adjust, Overtime Leave Deduction, Overtime Leave Adjust CNV, for employees using Cardinal Absence Management |
| PAID-OVD | OVD | OT @ Double Time |
| PAID-OVS | OVS | OT @ Straight Time |
| PAID-OVT | OVT | OT @ Time and Half |
| PAID-EOS | EOS | Emerg OT @ Straight Time |
| PAID-EOT | EOT | Paid Emerg OT @ Time and Half |
| PAID-CALHP | CALHP | Called Out Hours (Paid) |
| PAID-ONCHP | ONCHP | On-Call Hours (Paid) |
| PAID-ONCHX | ONCHX | On-Call Hours (Paid @ Time and Half) |



Time & Attendance Job Aid

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| Comp Time Plan | TRCs available on Timesheet | TRC Descriptions |
|----------------|--|---|
| PAID-SWP | SWP | SelEnfor/WrkZon/PrivDty (Paid @ Time and Half) |
| NONPROD_PD | ADMR, ALIR, BMOR, CCLR, CLOR, CSLR, DLRR, DSKR, DSSR, ELPR, ELWR, EMSR, ERLR, FCSR, FSKR, FVCR, LTDR, MBLR, MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, VACR, WRIR, ALIR, BMOR, CCLR, CLOR, CSLR, DLRR, DSKR, DSRR, ELPR, ELWR, EMSR, ERLR, FCSR, FSKR, FVCR, LTDR, MBLR, MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, WCIR | Not required non-productive leave codes for employees using External Leave system |
| NONPROD_RQ | HCSR, HNPR, HOLR, HOSR, LNPR, STDR, STLR, WCLR, WCPR, WCSR | Required non-productive leave codes for employees using External Leave system |
| EARNOT-ONC | ONCHR | On-Call Hours (Earn) for employees using External Leave system |
| EARNAM-ONC | ONCHE | On-Call Hours (Earn) for employees using Cardinal Absence Management |
| EARNOT-CAL | CALHR | Called Out Hours (Earn) for employees using External Leave system |
| EARNAM-CAL | CALHE | Called Out Hours (Earn) for employees using Cardinal Absence Management |
| EARNOT-ECS | ECSR | Emergency Comp Earn for employees using External Leave system |
| EARNAM-ECS | ECS | Emergency Comp Earn for employees using Cardinal Absence Management |
| EARNOT-OCS | OCSR | Comp Leave Earned for employees using External Leave system |
| EARNOT-OCT | OCTR | Overtime Leave Earned for employees using External Leave system |
| EARNOT-ECT | ECTR | Emergency OT Leave Earned for employees using External Leave system |



| Comp Time Plan | TRCs available on Timesheet | TRC Descriptions |
|----------------|-----------------------------|---|
| EARNAM-ECT | ECT | Emergency OT Leave Earned for employees using Cardinal Absence Management |
| AMNT-ONC\$\$ | | On-Call Amount |
| AMNT-CAL\$\$ | | Called Out Amount |
| AMNT-DIF\$\$ | | Weekend/Holiday Diff Amount |
| AMNT-MED\$\$ | | Medication Amount |

Note: Some TRCs can only be accessed by TL Administrators on the **Timesheet** page.

The amount Comp Plans (indicated by \$\$) should not be assigned unless the agency is interfacing and is already approved to use them.

- **Status:** Indicates if the employee is enrolled in the Comp Plan:
 - **A:** Active (employee is enrolled in the Comp Plan and is eligible for TRCs associated with the Comp Plan)
 - **I:** Inactive (employee no longer has access to the TRCs associated with the Comp Plan)

The following state default Comp Plan enrollments are assigned to employees by category.

Employees whose Agency uses Cardinal as the leave system of record:

- **CARDINAL:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Office Closure (CLO)
 - Holiday related (HOLM, HNPM, HOS, HCS)

Note: This should never be overridden at the Agency level.

- **COMP_LEAVE:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Comp Leave Earned (OCS)
 - Comp Leave Taken (CCL)
 - Holiday Comp (HCS)
 - *Comp Leave Payout (CPO)
 - *Comp Leave Adjust (CCA)

Note: This can be overridden at the Agency level. This plan also tracks the Leave Balance.

- **OT_LEAVE:** All Salaried Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Overtime Leave Earned (OCT) and Overtime Leave Taken (OCL)
 - Overtime Leave Payout (OPO)
 - Overtime Leave Adjust (OCA)

Note: This can be overridden at the Agency level to be either no access or use Overtime Leave Eligibility to selectively grant access to employees. If an Agency does not payout Overtime Leave balances at the time a Salaried employee transfers from Non-Exempt to Exempt, state default keeps OT_LEAVE enrollment (to use the remaining leave balance only) based on the employee specific Overtime Leave Eligibility. This plan also tracks the Leave Balance.

Employees whose Agency uses an external leave system of record:

- **NONPROD_RQ:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Holiday related (HOLR, HNPR, HOSR, HCSR)
 - Pay Docking (LNPR)
 - Short Term Disability (STDR, STLR)
 - Workers Compensation (WCLR, WCPR, WCSR)

Note: This should never be overridden at the Agency level.

NONPROD_PD: All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to most of the other Reported Time TRCs for Leave Taken (for example VACR, SCKR, CCLR, OCLR).

Note: Agencies that have Non-Exempt employees and pay OT with FLSA impacting earnings cannot override for their nonexempt employees.

- **EARNOT-OCS:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRC:
 - Comp Leave Earned (OCSR)

Note: This can be overridden at the Agency level.

- **EARNOT-OCT:** All Salaried Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRC:
 - Overtime Leave Earned (OCTR)

Note: This can be overridden at the Agency level.

Employees with Paid Overtime:

- **PAID-OVS:** Hourly Exempt and Salaried Non-Exempt employees with the ability to report paid straight time overtime are enrolled by default. This gives access to the following Reported Time TRC:
 - OT @ Straight Time (OVS)

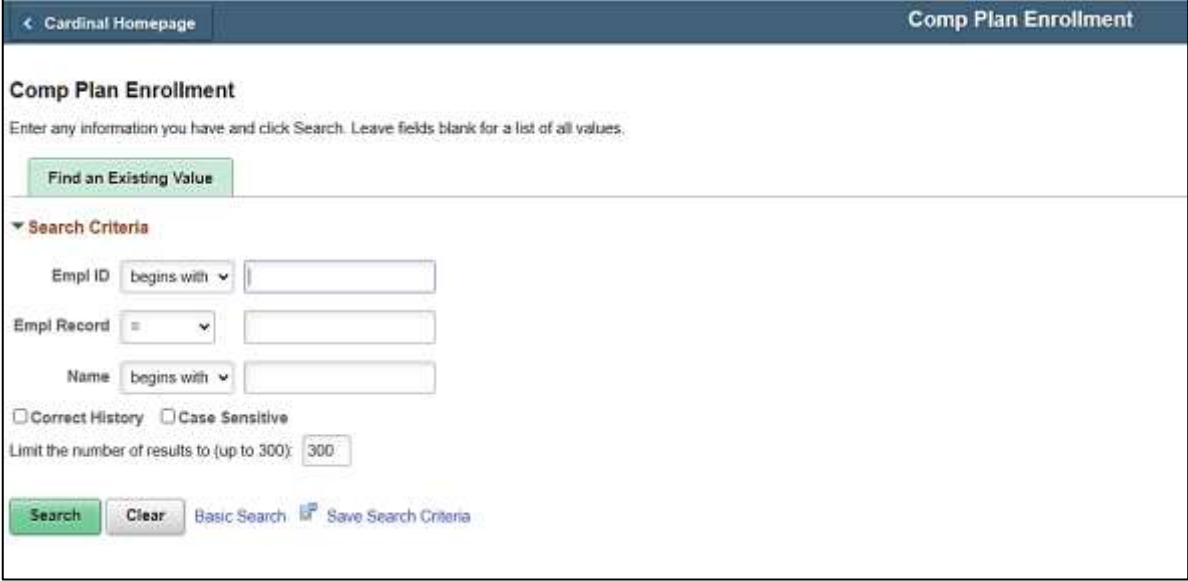


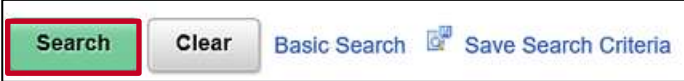
Note: This can be overridden at the Agency level.

- **PAID-OVT:** Hourly Non-Exempt and Salaried Non-Exempt employees with the ability to report paid time and half overtime are enrolled by default. This gives access to the following Reported Time TRC:
 - OT @ Time and Half (OVT)

Note: This can be overridden at the Agency level.

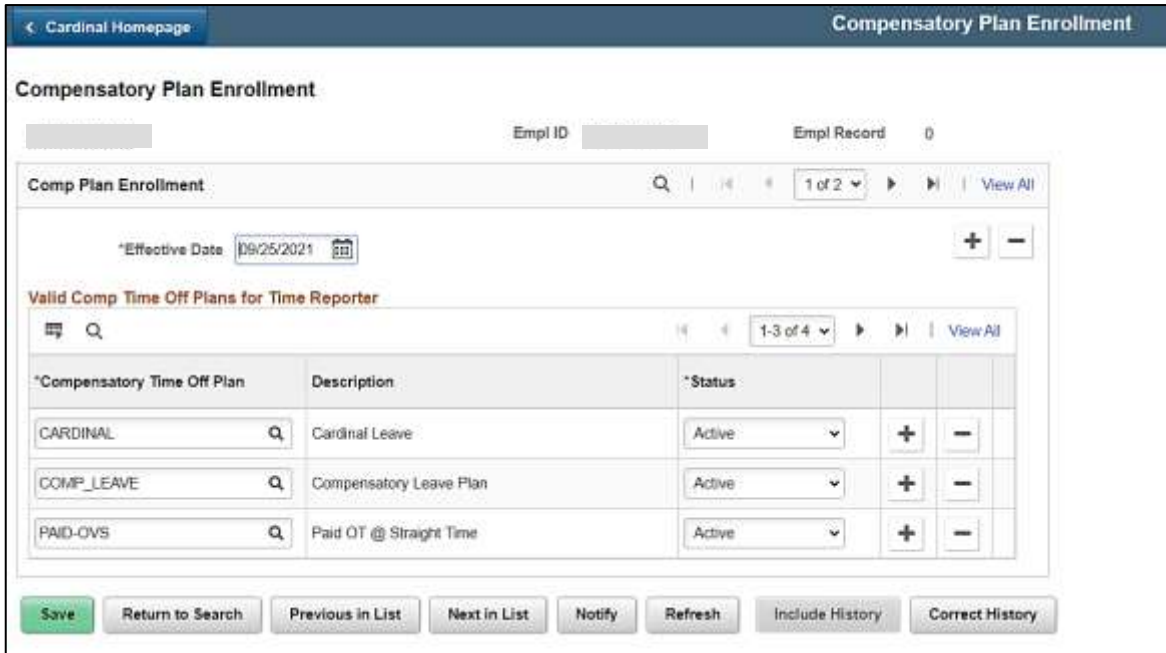
Accessing, Reviewing, and Updating Compensatory Plan Enrollments

Follow the steps in this section to learn about how to view the **Compensatory Plan Enrollment** page.

| Step | Action |
|--|---|
| 1. | Navigate to the Maintain Time Reporter Data page using the following path: Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data |
| <p>The Comp Plan Enrollment Search page displays.</p>  | |
| 2. | Enter the applicable employee's Employee ID or known portion of the Employee ID in the Empl ID field.  |
|  | Users can also search for the employee by the Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. |
| 3. | Click the Search button.  |

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

The **Compensatory Plan Enrollment** page displays for the applicable employee.

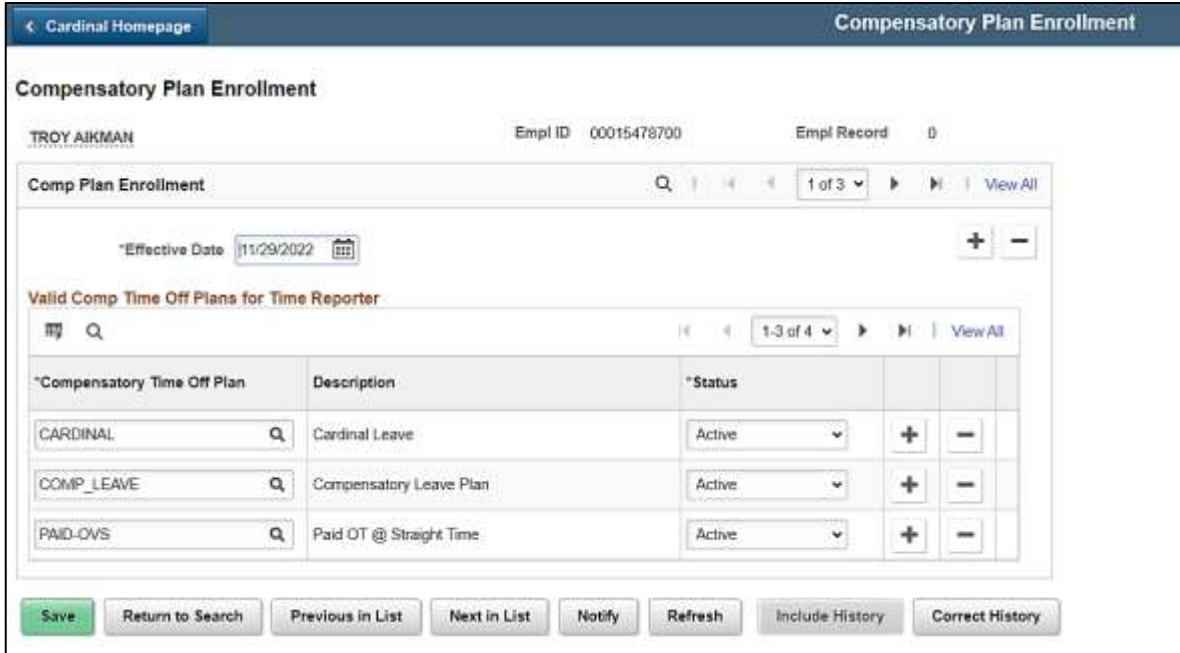


4. First, create a new effective dated row. Click the **Add a New Row** icon (+) located to the right of the **Effective Date** field within the **Comp Plan Enrollment** section



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

The page refreshes with a new effective date row.




The **Effective Date** field defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

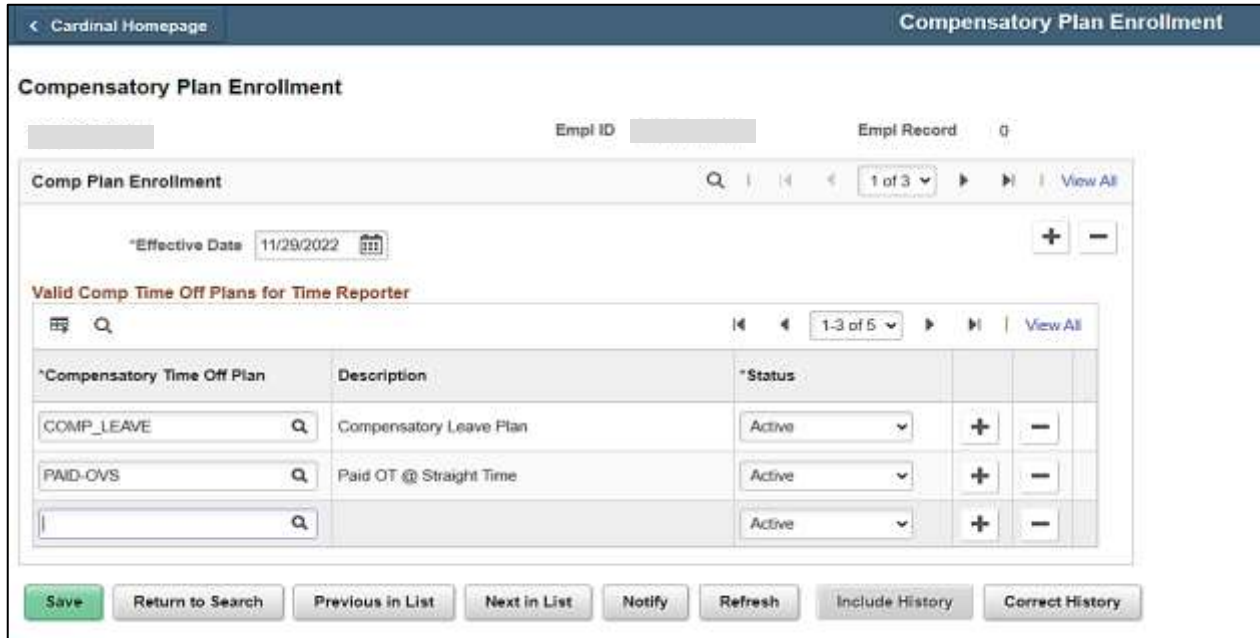
If inactivating a Comp Plan for the employee, update the corresponding **Status** field to "Inactive" using the dropdown button and then proceed to Step 8. If adding an additional Comp Plan(s) for the employee, proceed to Step 5.

- Click any of the **Add a New Row** icons (+) within the Valid Comp Time Off Plans for **Time Reporter** section.

| | | | | |
|------------|-------------------------|--------|---|---|
| CARDINAL | Cardinal Leave | Active | + | - |
| COMP_LEAVE | Compensatory Leave Plan | Active | + | - |
| PAID-OVS | Paid OT @ Straight Time | Active | + | - |

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

The page refreshes and a new row displays within the **Valid Comp Time Plans for Time Reporter** section.



Compensatory Plan Enrollment

Empl ID [] Empl Record []

Comp Plan Enrollment [] 1 of 3 [] View All

*Effective Date: 11/29/2022 []

Valid Comp Time Off Plans for Time Reporter

| *Compensatory Time Off Plan | Description | *Status | | |
|-----------------------------|-------------------------|------------|---|---|
| COMP_LEAVE [] | Compensatory Leave Plan | Active [] | + | - |
| PAID-OVS [] | Paid OT @ Straight Time | Active [] | + | - |
| [] | | Active [] | + | - |

Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Include History, Correct History

- Select the applicable Comp Plan using the **Compensatory Time Off Plan Look Up** icon.

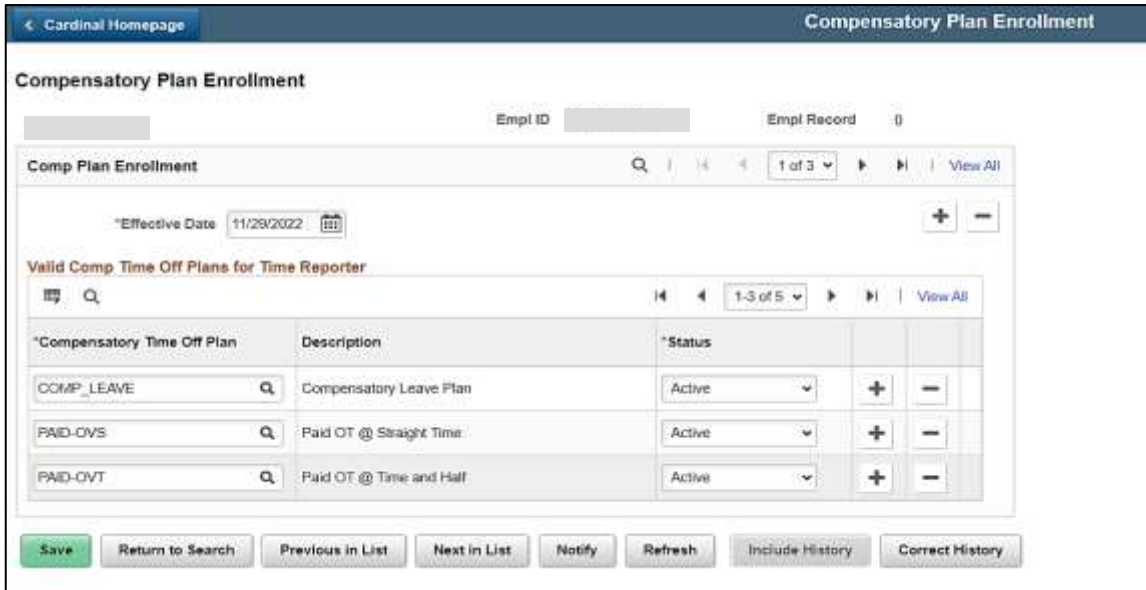



*Compensatory Time Off Plan

| | |
|----------------|-----|
| COMP_LEAVE [] | [] |
| PAID-OVS [] | [] |
| [] | [] |

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

The page refreshes with the selected Comp Plan.



| | |
|--|---|
|  | To add additional Comp Plans, repeat these steps. |
|--|---|

| | |
|----|--|
| 7. | Once complete, click the Save button. |
|----|--|



Work Schedules Overview

General Information:

The Time & Labor Administrator should monitor employee Work Schedules to ensure all employees have a Work Schedule assigned. The Employee Schedule Review Query V_TA_SCHEDULE_REVIEW provides a list of time reporters that require an update to their Work Schedule. For further information about this query, see the Cardinal HCM Time and Attendance Reports Catalog. This Report Catalog is located on the Cardinal Website in **Reports Catalogs** under **Resources**.

Each employee must have an assigned Work Schedule in Cardinal. Work Schedules are assigned to employees by either the TL Employee Setup Administrator, the TL Administrator, or the employee's TL Supervisor. Timekeepers can only view employee Work Schedules.

Types of Work Schedules:

Hourly – This is a schedule with zero pre-defined hours. Hourly employees must report all hours in order to be paid.

Set Schedule – This is a non-flexible schedule with predictable days and hours. A set Work Schedule could also include a rotating pattern.

Variable Schedule – This is a flexible schedule that is set up in the system as 24 hours a day, 7 days a week. This type of schedule requires an employee to report all hours.

Users with the following TA Roles have the ability to view employee Work Schedules:

- Timekeepers
- TL Administrators
- TL Employee Setup Administrators
- TL Supervisors

Users with the following TA Roles have the ability to assign and maintain employee Work Schedules:

- TL Administrators
- TL Employee Setup Administrators
- TL Supervisors



Work Schedule Naming Convention:

Below are some examples of how Schedule ID's are named:

SETID = STATE, 7-Day

Format: NN.NN-AAAAAAA-B, Example: 40.00-Z88888Z-0

| Character | Defines | Value |
|-----------|---|--|
| NN.NN | Schedule Hours for the week | Example: 40.00, 37.5 |
| AAAAAAA | 7-day indicator – first character is Day 1, second character is Day 2, etc. | 0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00 |
| B | Indicates a unique schedule | 0-9, A-Z – to indicate a unique schedule |

SETID = STATE, 9X80

Format: 9X80-AAAAAAA-B, Example: 9X80-Z9998ZZ-0

| Character | Defines | Value |
|-----------|--|--|
| AAAAAAA | 7-day indicator – first character is Day 1, the second character is Day 2, etc. | 0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00 |
| B | Indicates a unique schedule | 0-9, A-Z – to indicate a unique schedule |

- 9X80 schedules must not be assigned to Non-Exempt employees
- Day 1 in the 14 day schedule will correspond to a Biweekly Pay Period Begin Date in Cardinal – used by Hourly employees



- SETID = <Business Unit>
- Format: NN.NN-AAAAAAA-B, Example: 40.00-5X8X3WK-0

| Character | Defines | Value |
|-----------|--|--|
| NN.NN | Schedule Hours for the week | Example: 40.00, 37.5 |
| AAAAAAA | 7-day indicator – first character is Day 1, the second character is Day 2, etc. | Example: 4X10+5X8 – Week 1 is a 4 day/10-hour work week, and Week 2 is a 5 day/8-hour work week. 4X10X2WK - Week 1 is a 4 day/10-hour work week, and Week 2 is also a 4 day/10-hour work week, however the workdays are not the same for each week. 4X10+OTH – Week 1 is a 4/day/10-hour work week, and Week 2 is some other type of work week that is not 5X8 or 4x10. |
| B | Indicates a unique schedule | 0-9, A-Z – to indicate a unique schedule |

For detailed information and step-by-step instructions on how to maintain employee Work Schedules, refer to one of the following:

Job Aid: **TA: Maintaining Employee Work Schedules**

- This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
- Tutorial Video: **Manually Assigning Work Schedules**

Note: Access this Tutorial Video on the Cardinal Website using the following path:

Learning > Videos (HCM) > Time & Attendance Tutorials for Core Users