Managing Absence Events

This Job Aid provides Agency Timekeepers with the information needed to manage Absence Events on behalf of employees.

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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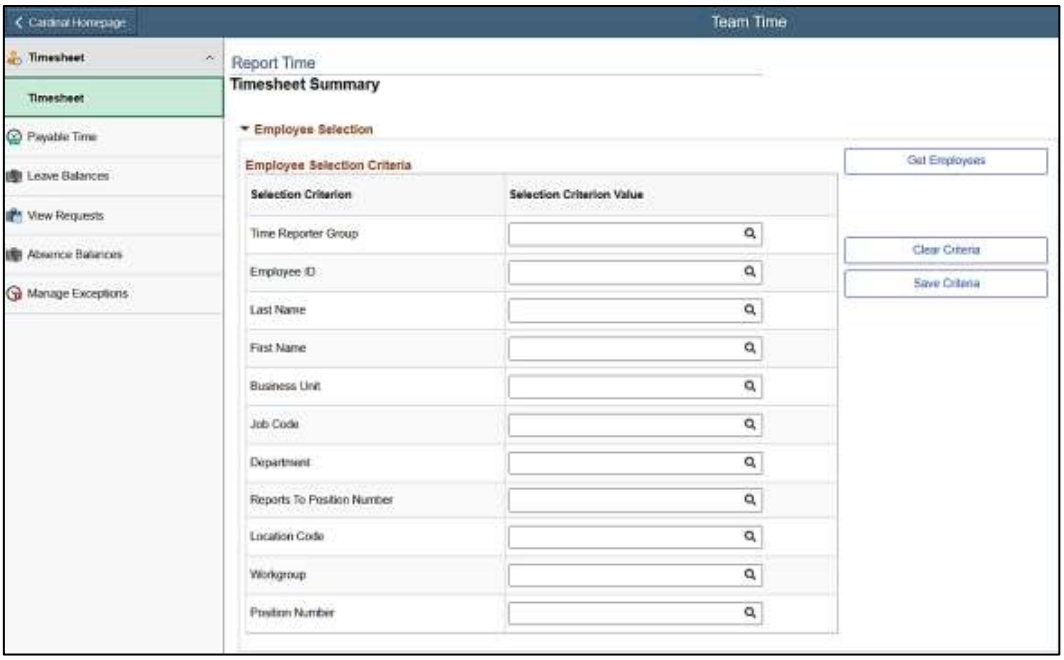
Creating a New Absence Event (No Partial Days)

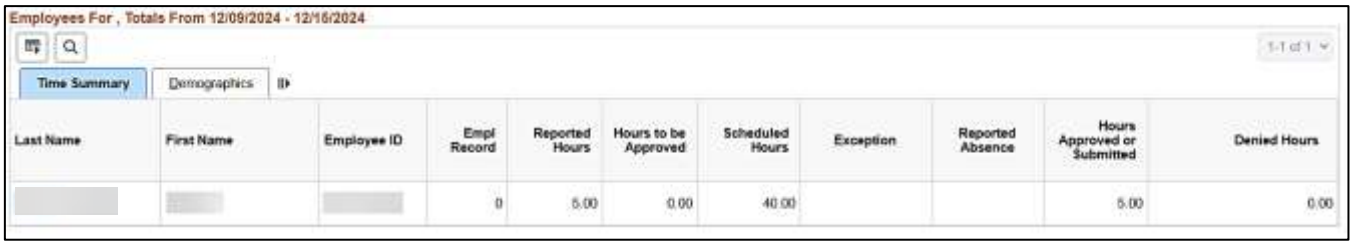
In this scenario, a new Absence Event will be created on behalf of an employee. For this scenario, (2) full days of vacation will be taken by the employee.

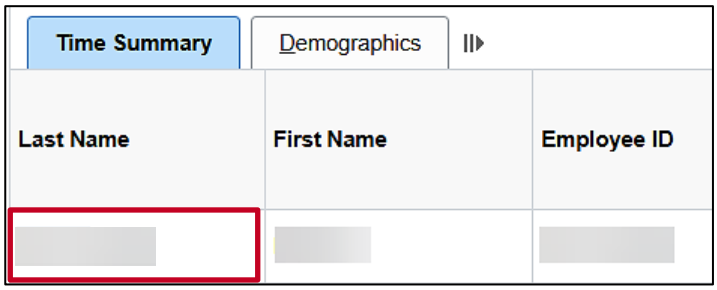
Note: This scenario only applies to agencies using Cardinal Absence Management. Additionally, this section of the Job Aid is not for use by employees with a Variable Work Schedule. If entering an Absence Event for an employee with a Variable Work Schedule, refer to the Creating a New Absence Event (With Partial Day(s)) section of this Job Aid. The process for entering an Absence Event on behalf of an employee is the same regardless of whether the employee is a Positive Time Reporter or an Exception Time Reporter.

Step	Action
1.	Navigate to the **Timesheet** page using the following path: **Team Time Tile > Timesheet**
The **Timesheet Summary** page displays. 	
2.	Enter the Employee ID or known portion of the Employee ID in the **Employee ID** field.
	Users can also search by 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.

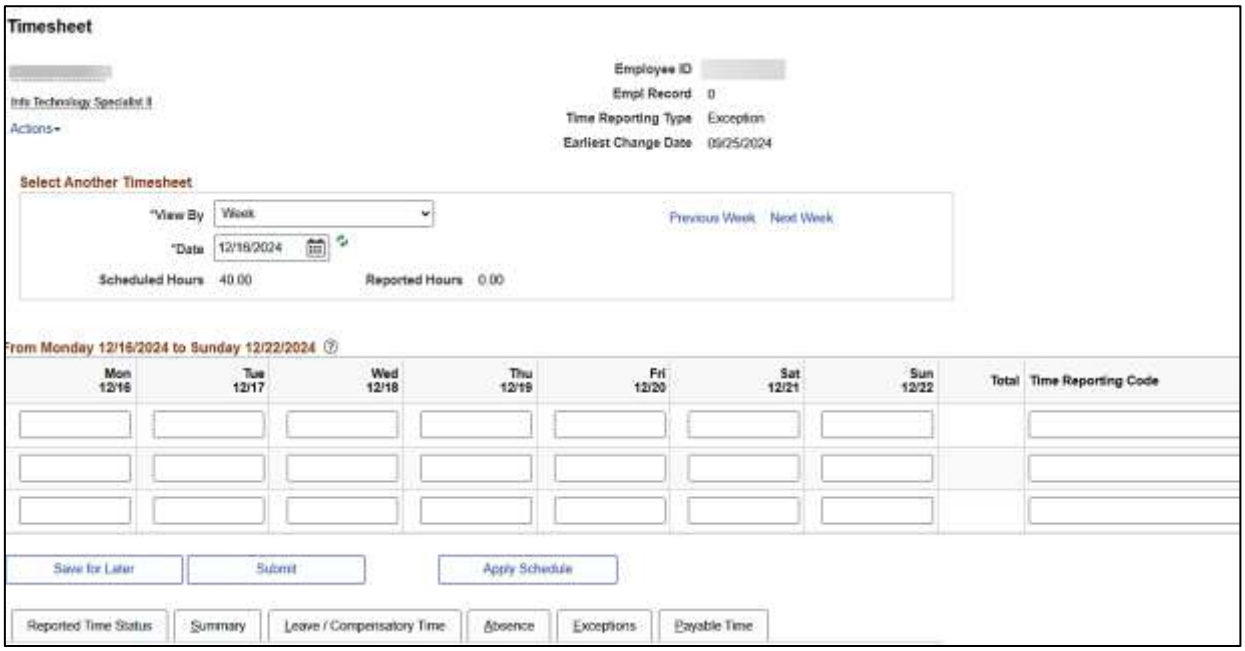
Step	Action
3.	Click the **Get Employees** button.

The **Search Results** display on the bottom portion of the **Timesheet Summary** page.

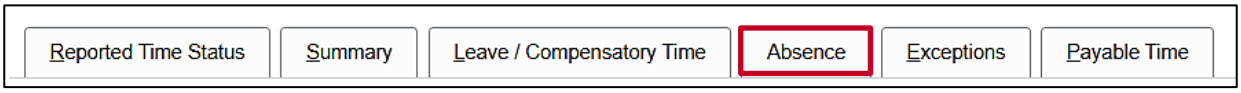


4.	Click on the **Last Name** link for the applicable employee. 

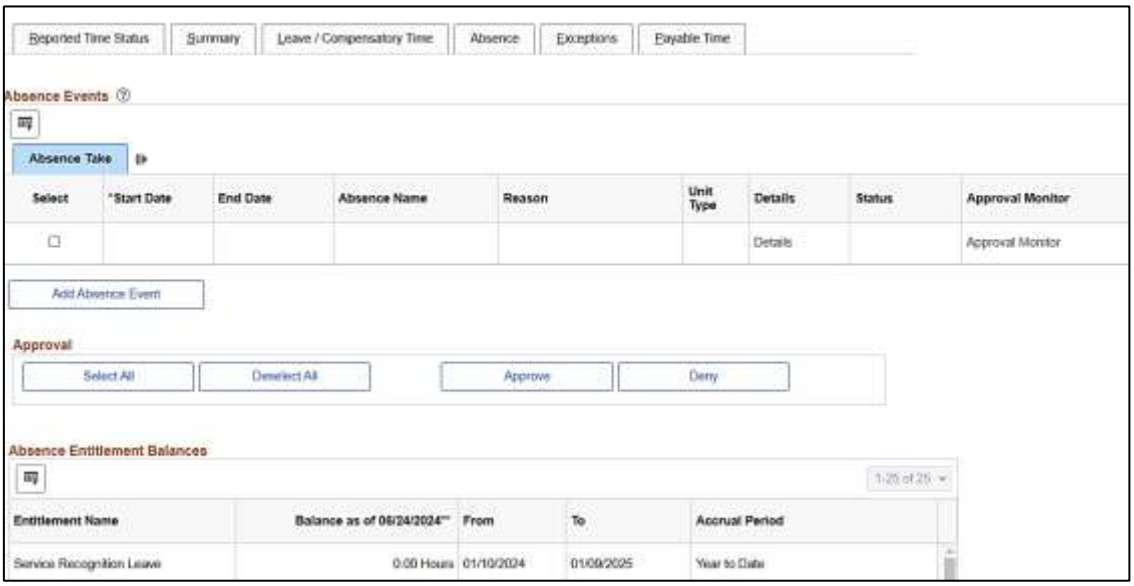
The **Timesheet** page displays for the applicable employee.



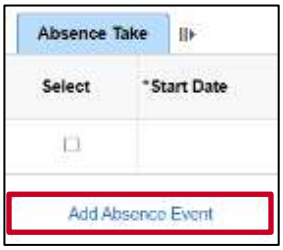
Step	Action
	If the correct week is not displayed, use the **Previous Week** link, **Next Week** link, or **Date** field to navigate to the correct week.
5.	Click the **Absence** tab.



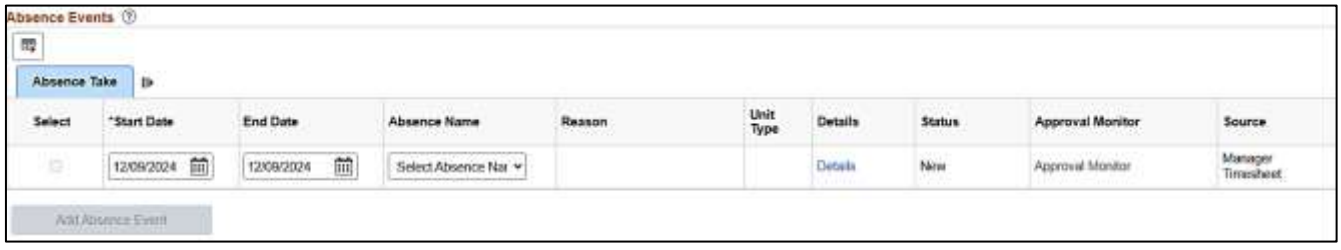
The **Absence Events** section displays.

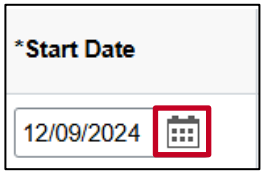
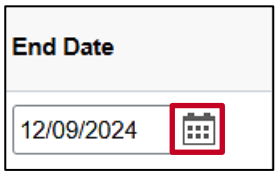
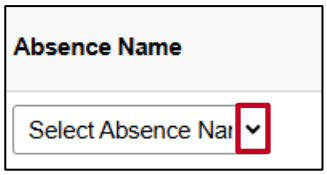


6.	Select the **Add Absence Event** button.

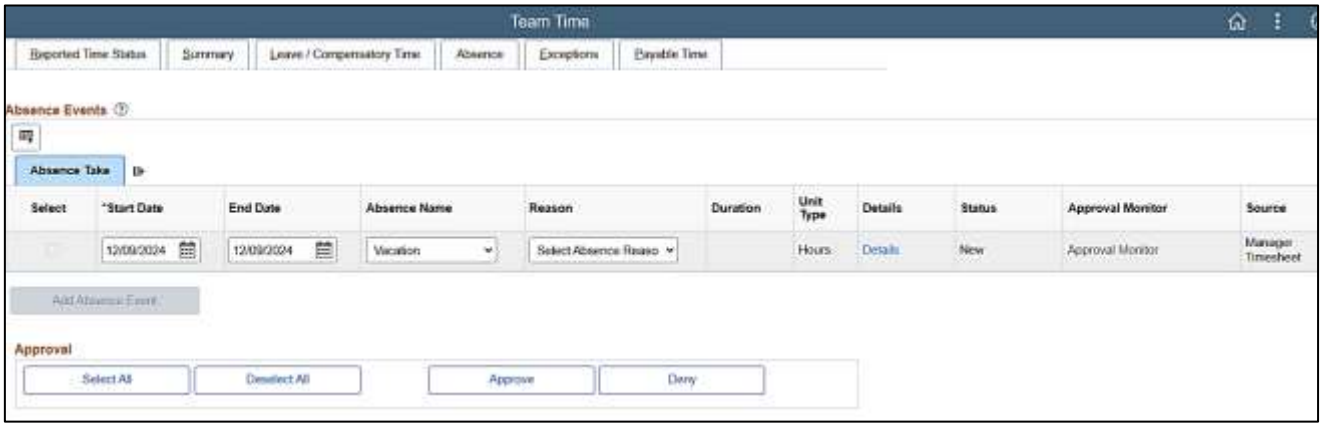


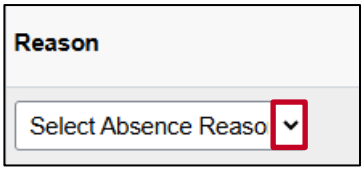
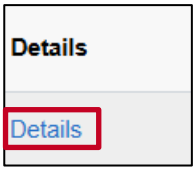
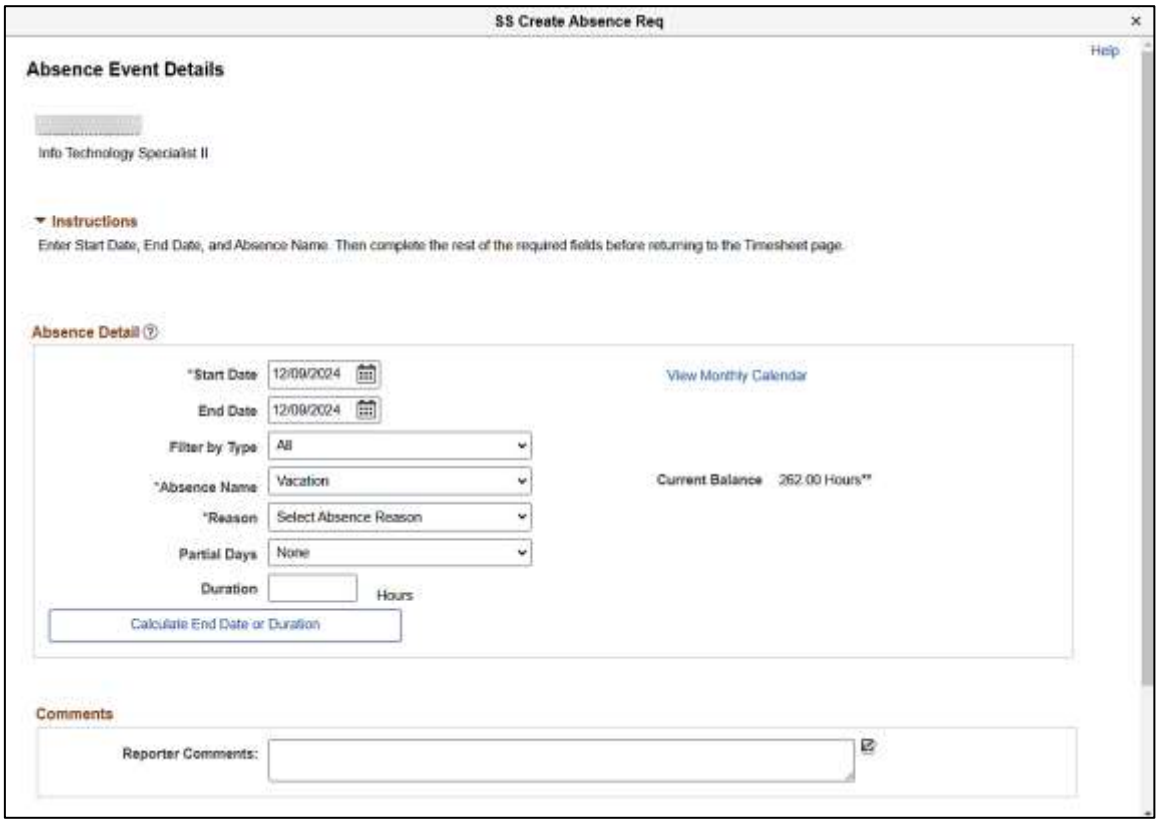
The page refreshes and the first row within the **Absence Take** grid populates with some defaulted data.

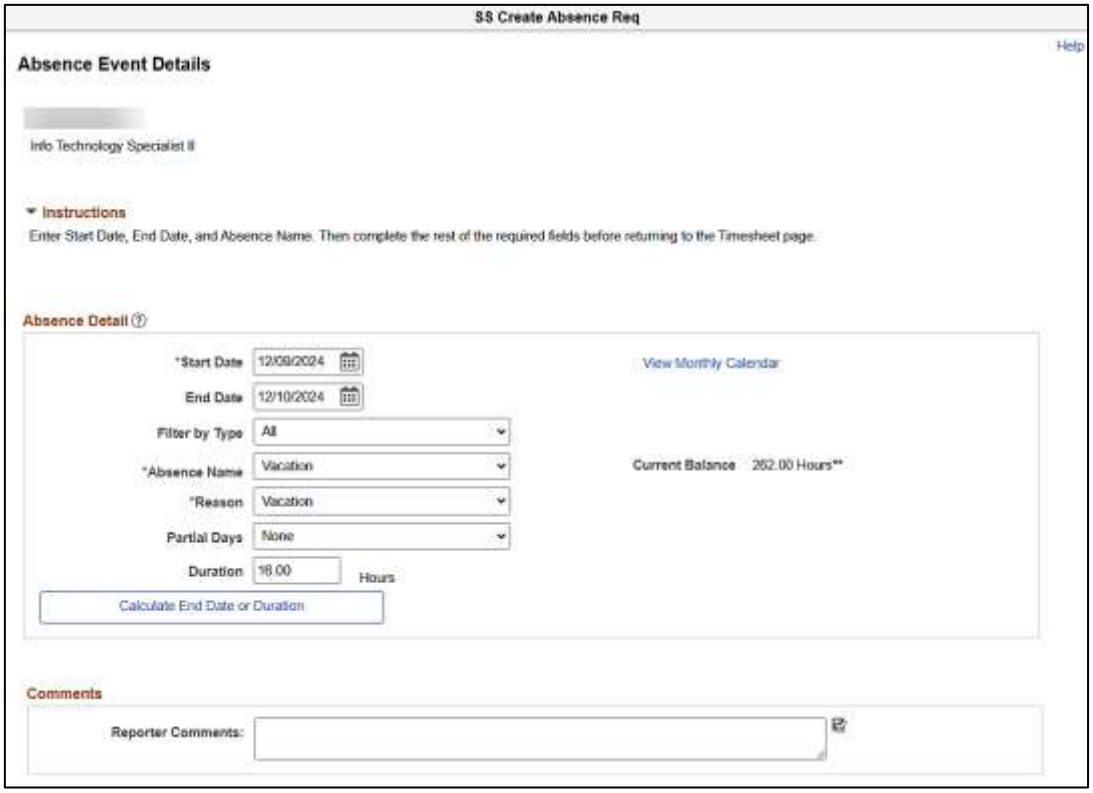
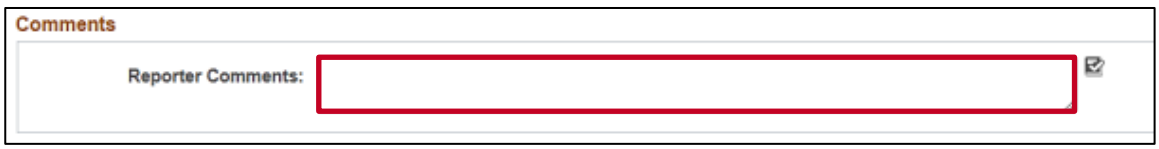


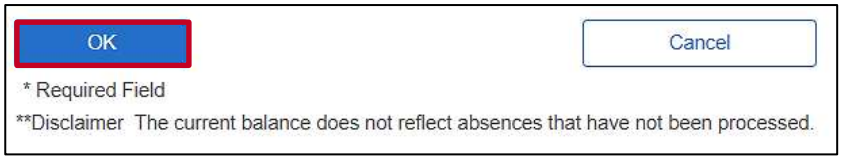
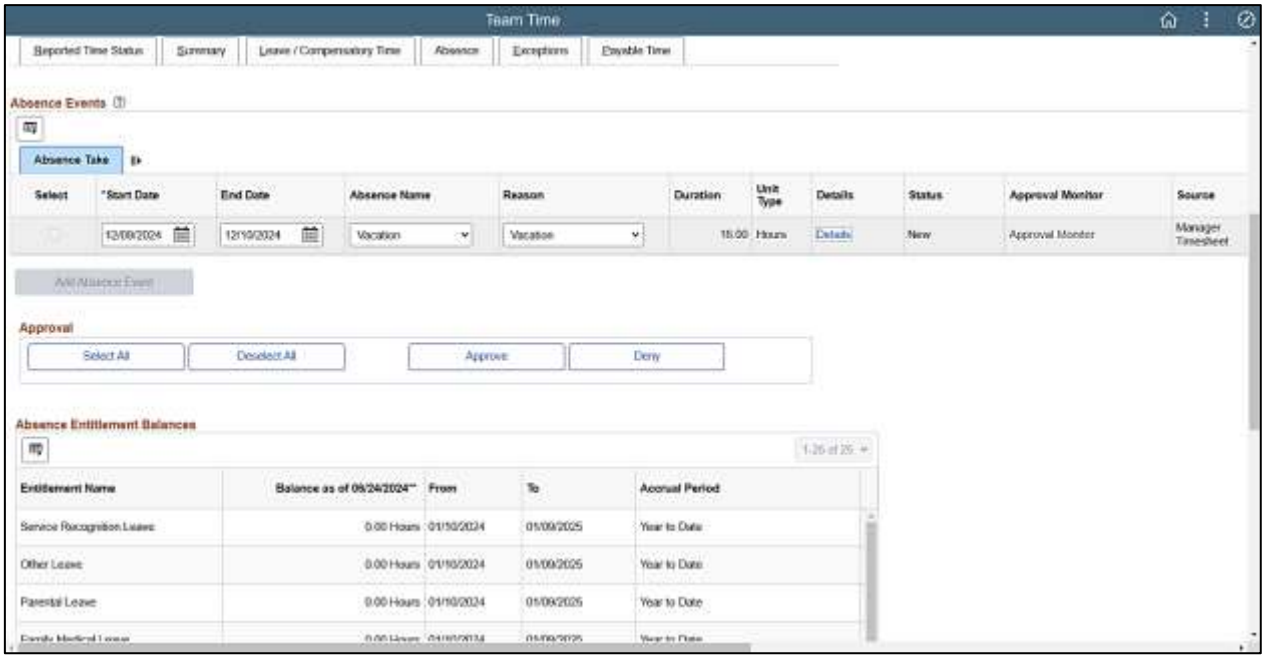
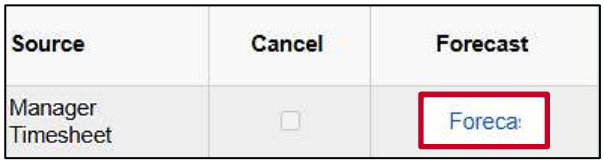
Step	Action
7.	The **Start Date** field defaults to the first day for this particular Timesheet. Update the start date as needed using the **Calendar** icon provided to denote the actual first day of the absence. 
8.	The **End Date** field defaults to the first day for this particular Timesheet or to the same date just selected for the start date if an update was made to the **Start Date** field. Update the end date as needed using the **Calendar** icon provided to denote the actual last day of the absence. 
9.	Click the **Absence Name dropdown** button and then select the applicable absence name list item. 
	The list items available for selection will vary based on the absence types that individual employees are eligible for.

The page refreshes and the **Reason** field is now available for update.



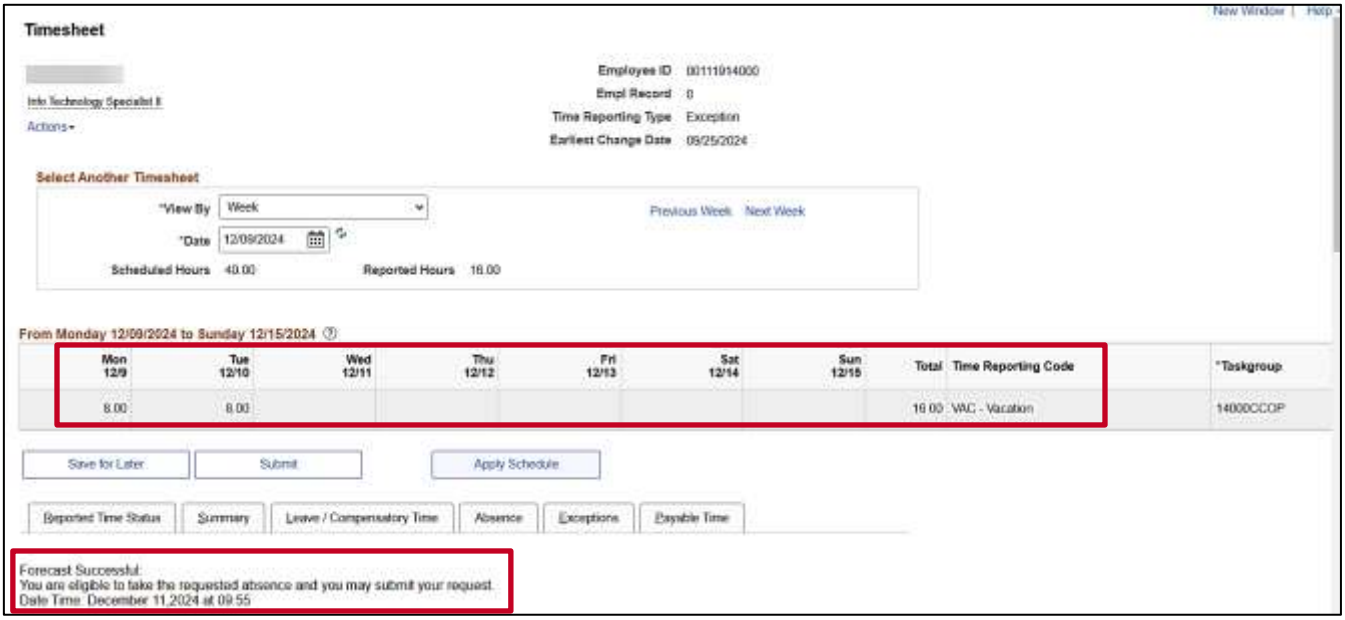
Step	Action
10.	Click the **Reason** dropdown button and then select the applicable absence reason list item. 
11.	Click the **Details** link. 
The **SS Create Absence Req** page displays in a pop-up window. 	
The information previously entered (**Start Date**, **End Date**, **Absence Name**, and **Absence Reason**) populates in the corresponding fields. Additionally, the employee's current balance for the applicable Absence Type displays on the right side of the page.	

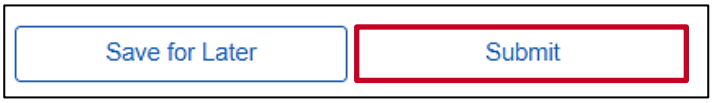
Step	Action
12.	Review the information and update as needed. Once complete, click the **Calculate End Date or Duration** button.
The page refreshes and the system generates the total number of absence hours in the **Duration** field. 	
13.	Review the total number of absence hours in the **Duration** field and ensure accuracy.
14.	Optionally enter comments for the Approver in the **Reporter Comments** field. 

Step	Action
15.	Click the **OK** button. 
The **Timesheet** page returns. 	
16.	Click the horizontal scrollbar as needed to scroll over to the right side of the page.
17.	Click the **Forecast** button. 
	Most Absence Types must be forecasted successfully in order to be submitted for approval. This is true regardless of whether the Absence Event being entered is historical, current, or future dated.

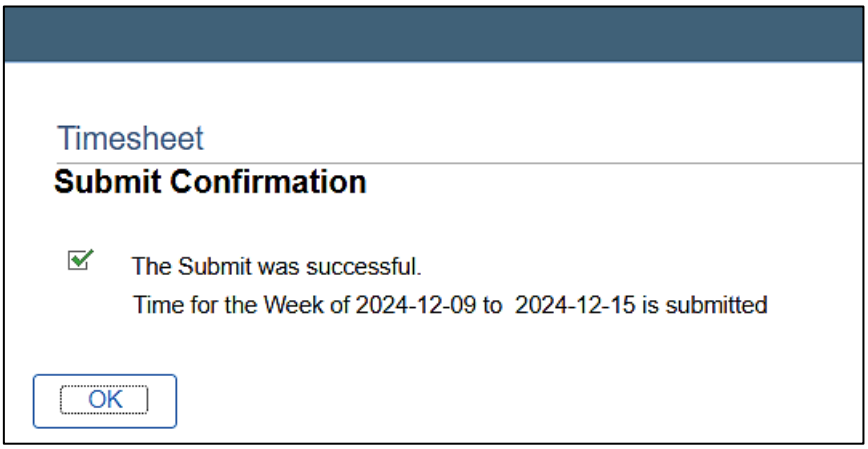
Step	Action

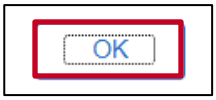
The page refreshes and a Forecast Successful message displays. Additionally, the absence hours are now displayed in the **Timesheet** grid with the corresponding Time Reporting Code.



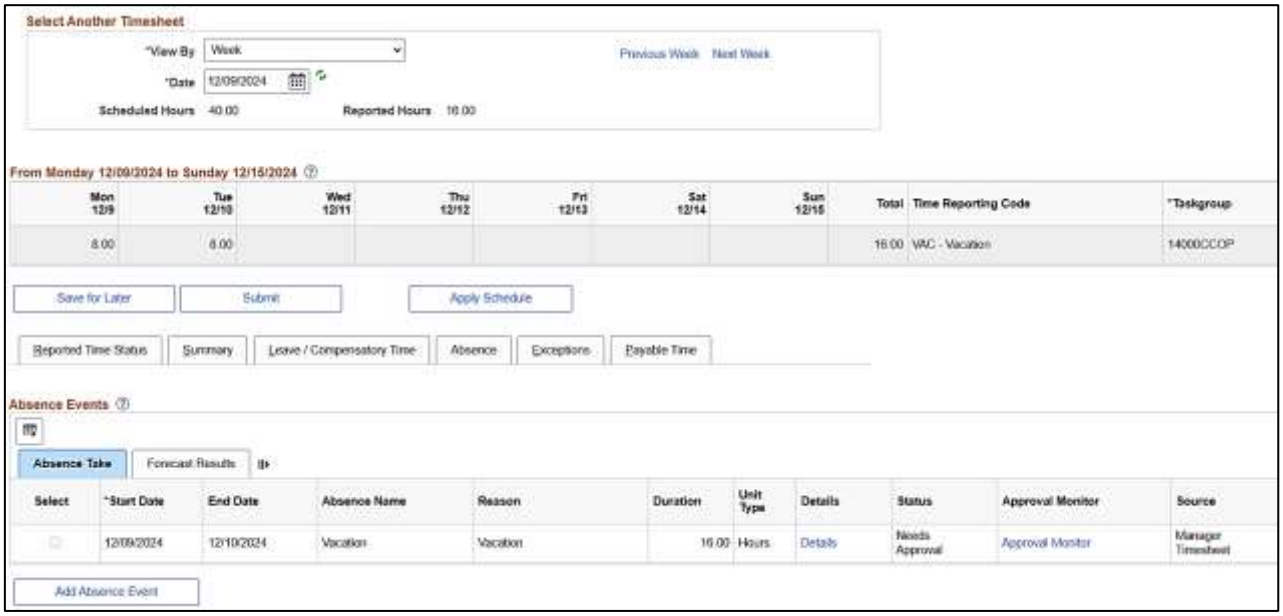
	If the forecast is unsuccessful, the employee does not have a sufficient balance for the selected absence type. Update the absence type or duration as needed until the Absence Event can be forecasted successfully.
18.	Click the **Submit** button. 

The **Submit Confirmation** page displays.



Step	Action
19.	Click the **OK** button. 

The **Timesheet** page returns.



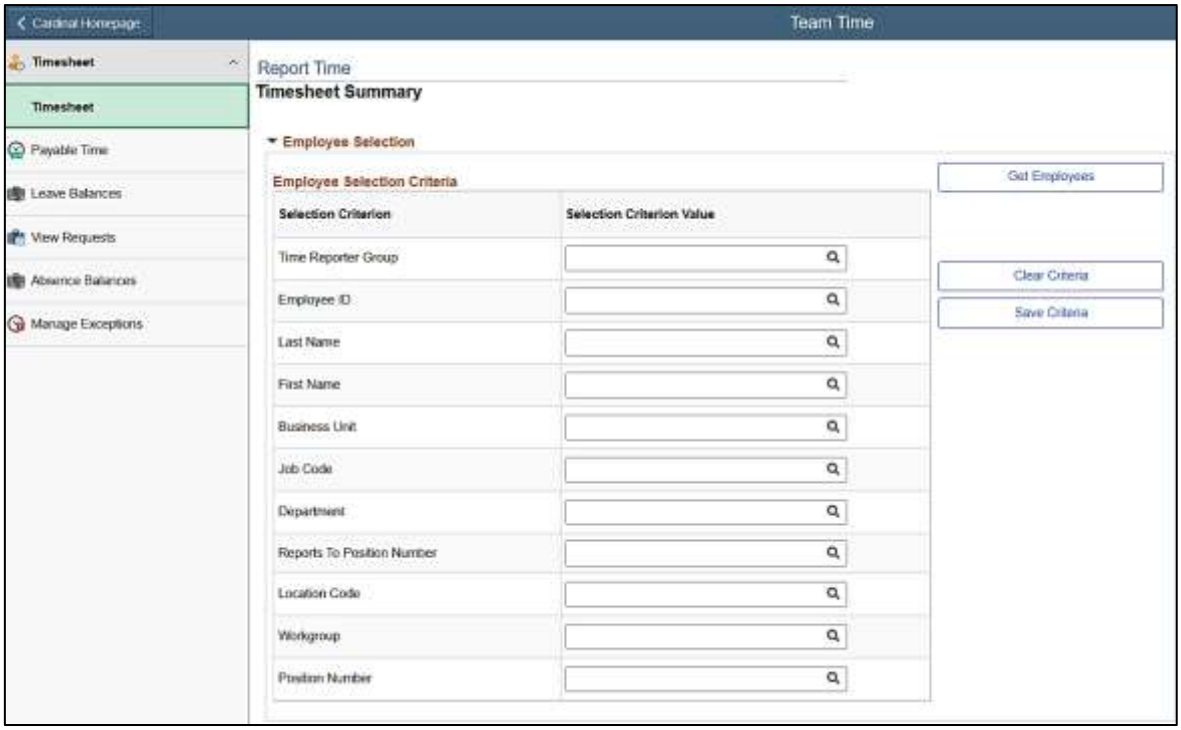
Vacation hours require approval before they can be processed. Notice the status for the Absence Event is now “Needs Approval”.

Details	Status	Approval Monitor	Source
Details	Needs Approval	Approval Monitor	Manager Timesheet

Creating a New Absence Event (With Partial Days)

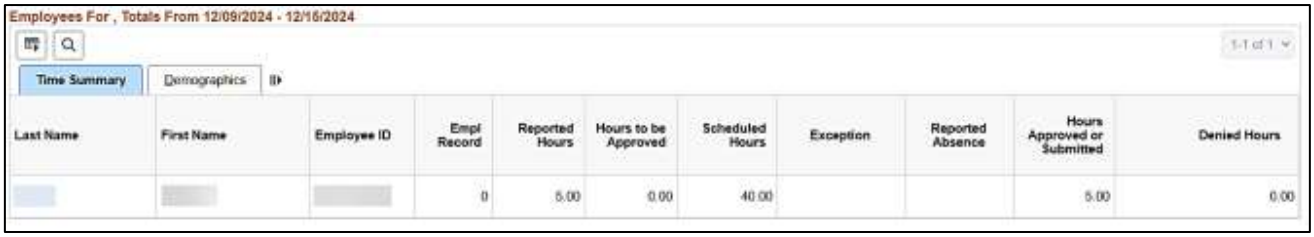
In this scenario, a new Absence Event will be created on behalf of an employee. For this scenario, (1) half-day and (1) full day of vacation will be taken by the employee.

Note: This scenario only applies to agencies using Cardinal Absence Management.

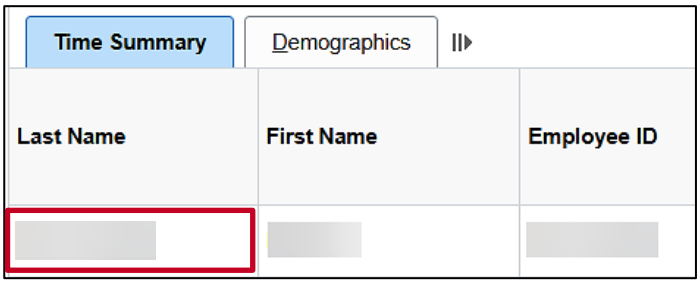
Step	Action
1.	Navigate to the **Timesheet** page using the following path: **Team Time Tile > Timesheet**
The **Timesheet Summary** page displays. 	
2.	Enter the Employee ID or known portion of the Employee ID in the **Employee ID** field.
	Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.
3.	Click the **Get Employees** button.

Step	Action

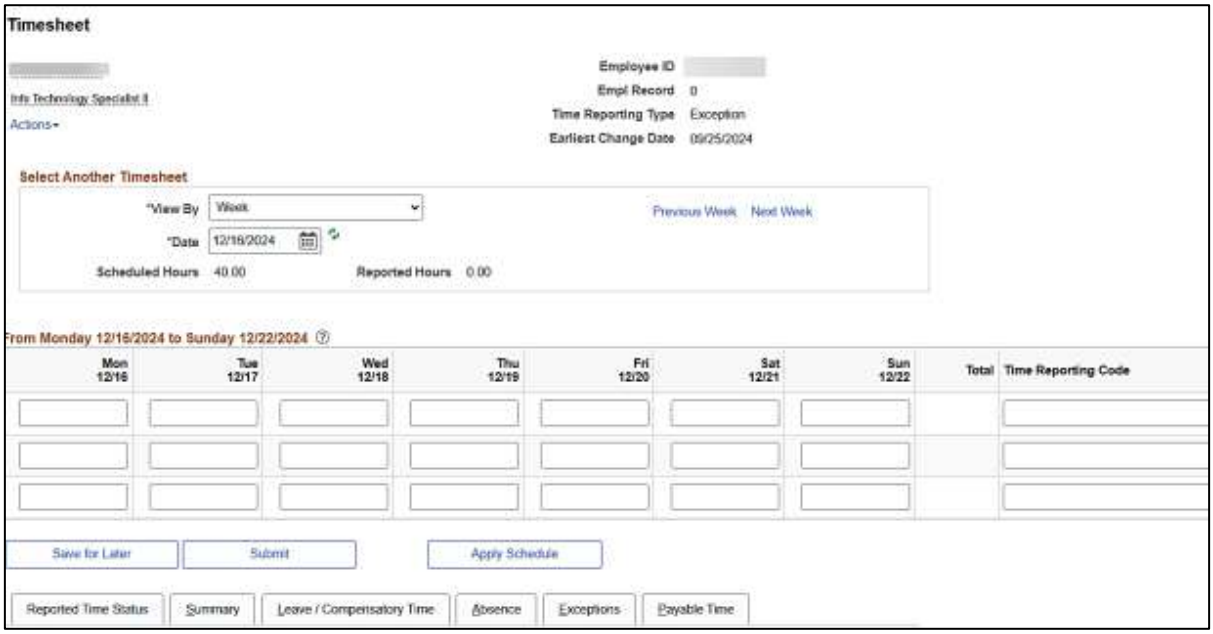
The **Search Results** display on the bottom portion of the **Timesheet Summary** page.



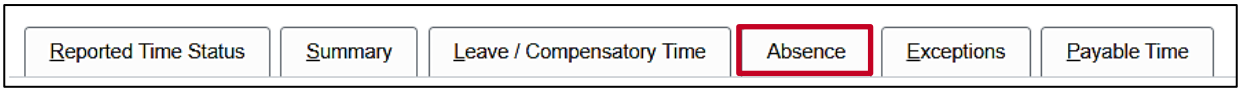
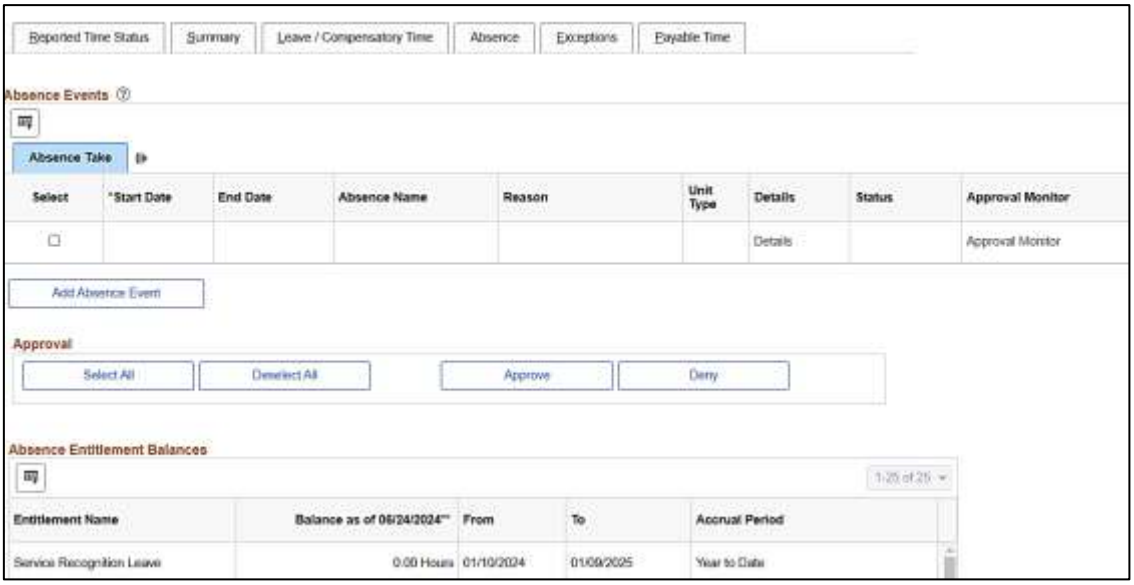
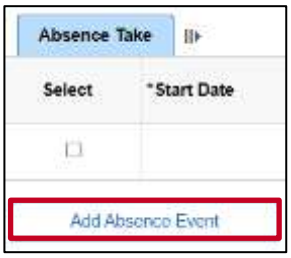
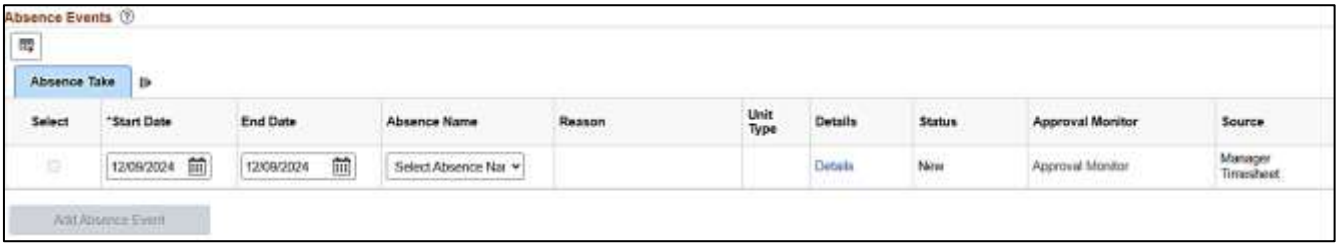
4. Click on the **Last Name** link for the applicable employee.

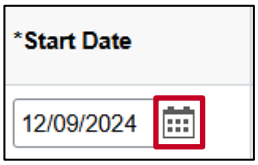
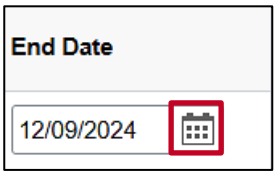
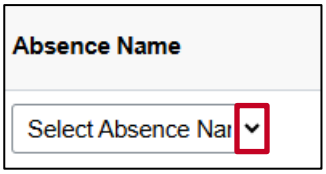


The **Timesheet** page displays for the applicable employee.

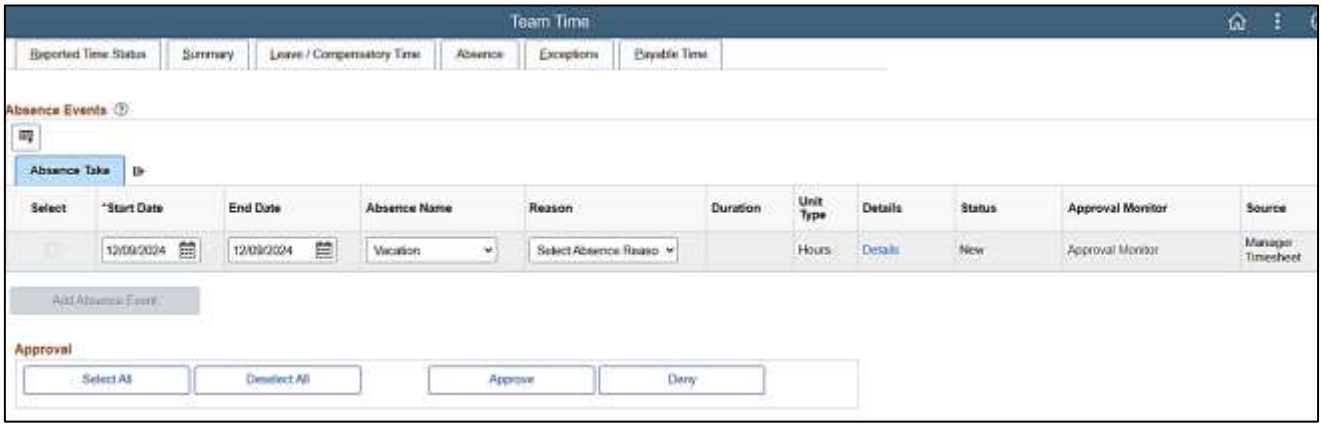


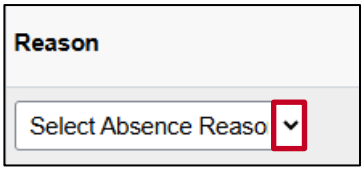
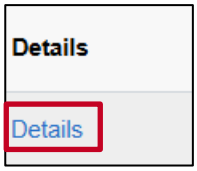
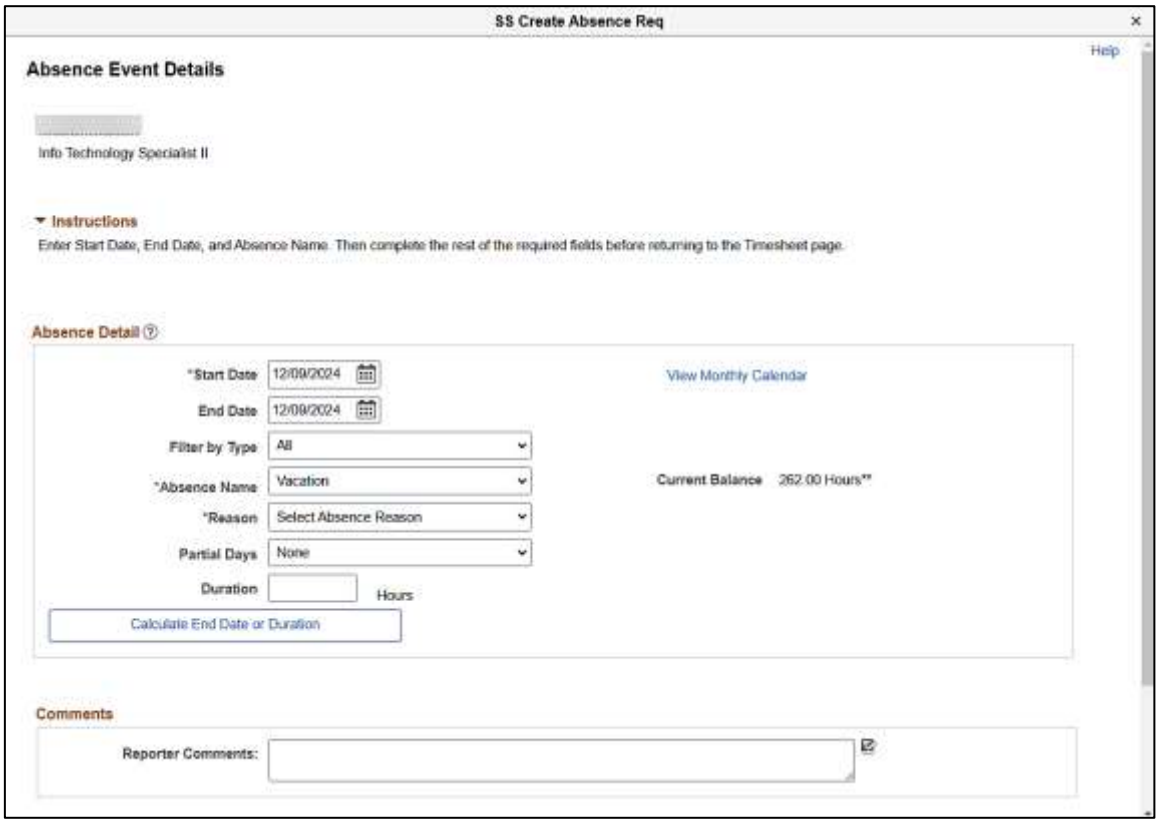
If the correct week is not displayed, use the **Previous Week** link, **Next Week** link, or **Date** field to navigate to the correct week.

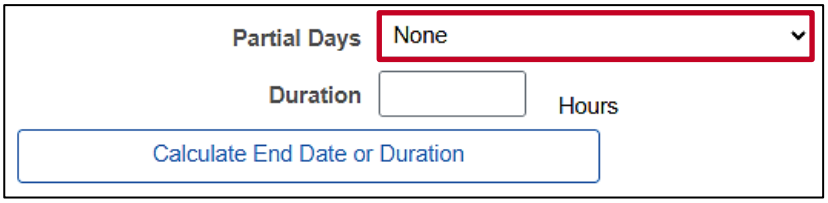
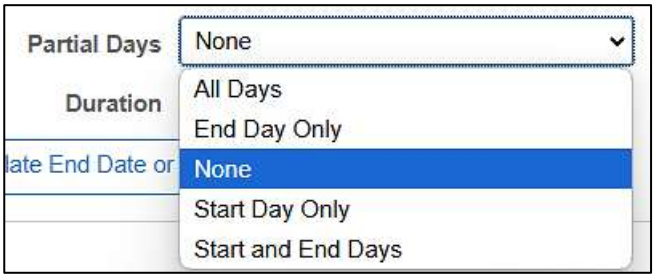
Step	Action
5.	Click the **Absence** tab. 
The **Absence Events** section displays. 	
6.	Select the **Add Absence Event** button. 
The page refreshes and the first row within the **Absence Take** grid populates with some defaulted data. 	

Step	Action
7.	The **Start Date** field defaults to the first day for this particular Timesheet. Update the start date as needed using the **Calendar** icon provided to denote the actual first day of the absence. 
8.	The **End Date** field defaults to the first day for this particular Timesheet or to the same date just selected for the start date if an update was made to the **Start Date** field. Update the end date as needed using the **Calendar** icon provided to denote the actual last day of the absence. 
9.	Click the **Absence Name dropdown** button and then select the applicable absence name list item. 
	The list items available for selection will vary based on the absence types that individual employees are eligible for.

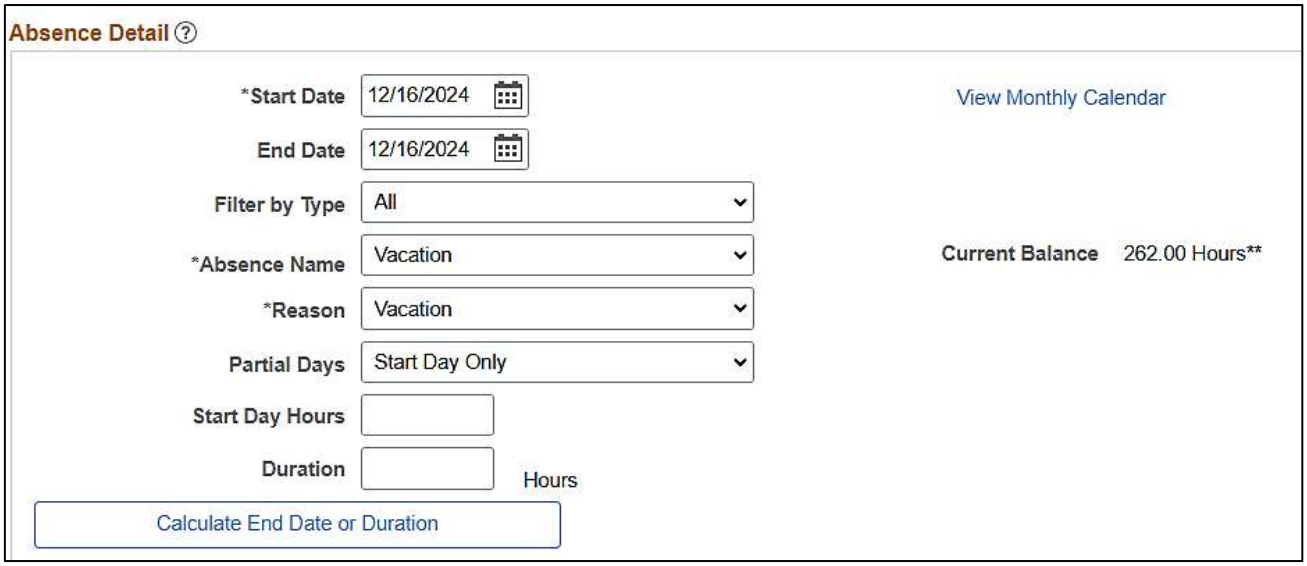
The page refreshes and the **Reason** field is now available for update.



Step	Action
10.	Click the **Reason** dropdown button and then select the applicable absence reason list item. 
11.	Click the **Details** link. 
The **SS Create Absence Req** page displays in a pop-up window. 	
The information previously entered (Start Date, End Date, Absence Name, and Absence Reason) populates in the corresponding fields. Additionally, the employee's current balance for the applicable Absence Type displays on the right side of the page.	
12.	Review the information and update as needed.

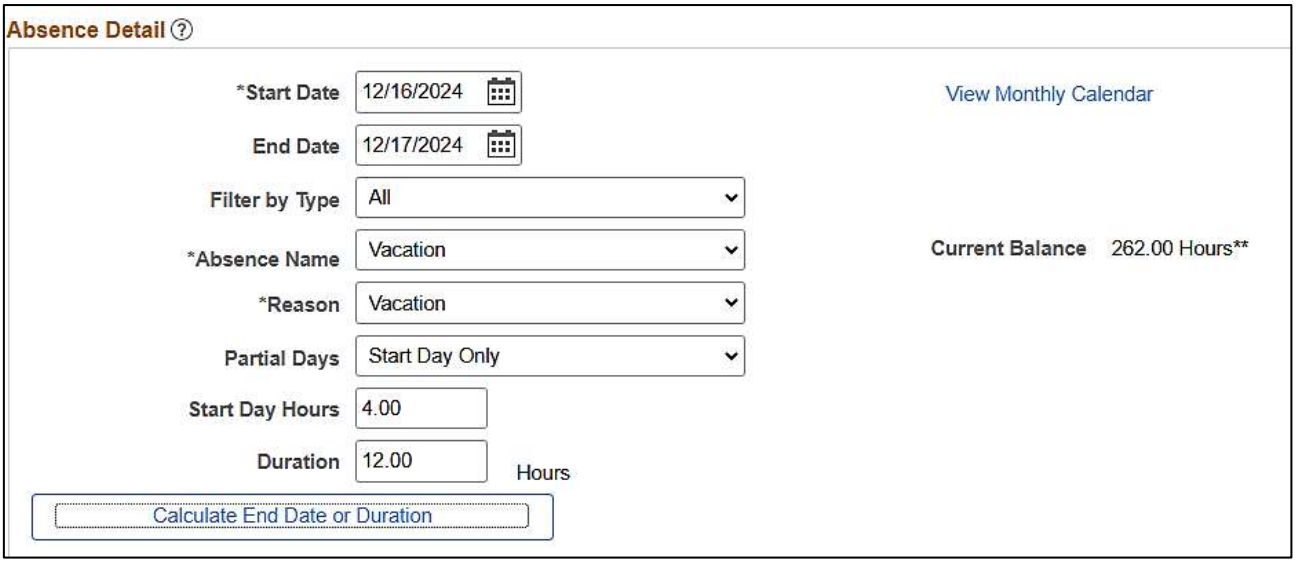
Step	Action
13.	The **Partial Days** field defaults to “None” and must be updated. 
	When entering Absence Events for employees with a Variable Work Schedule, always select a Partial Days option. Remember, Varable Work Schedules calculate time at 24 hours per day so partial days and actual hours must be entered so that the absence duration will calculate correctly.
14.	Click the **Partial Days dropdown** button and select the applicable list item based on the following: • All Days: Select this option if every day of the absence is going to be a partial day. This is the appropriate selection for employees with a Variable Work Schedule. This selection should also be used if this is just a (1) partial day absence • End Day Only: Select this option when only the last day of the absence is a partial day • Start Day Only: Select this option when only the first day of the absence is a partial day • Start and End Days: Select this option when both the first day and the last day of the absence will be partial days 

Step	Action
	The page refreshes.

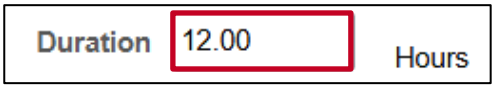


	In this scenario, the “Start Day Only” option was selected. Therefore, a **Start Day Hours** field displays. The **Hours** field that will display will vary based on the Partial Days option selected.
15.	Enter the applicable number of hours being taken as an absence on the partial day(s) in the corresponding **Hours** field.
16.	Click the **Calculate End Date or Duration** button.

Step	Action
	The page refreshes and the system generates the total number of absence hours in the **Duration** field.

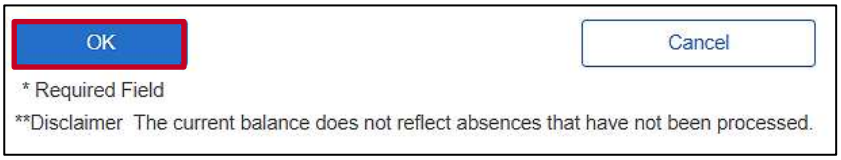


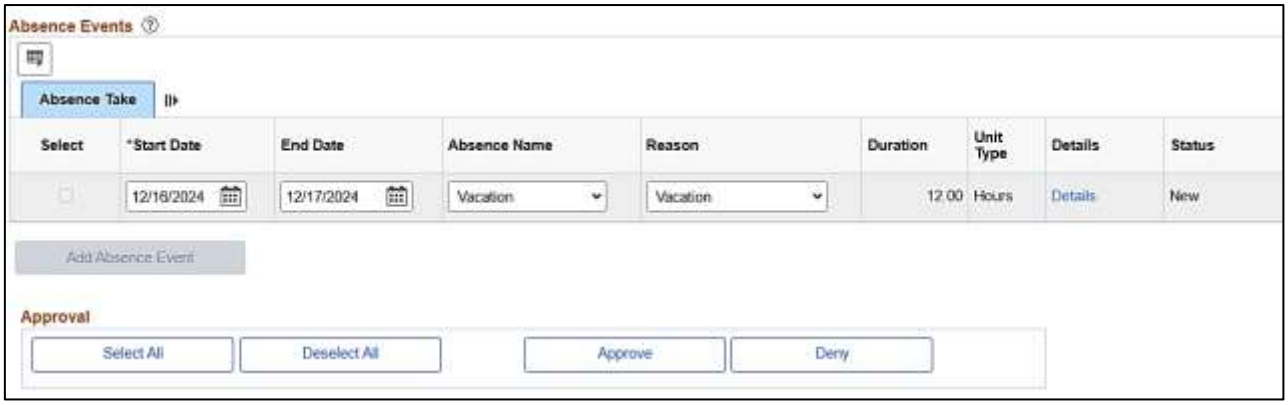
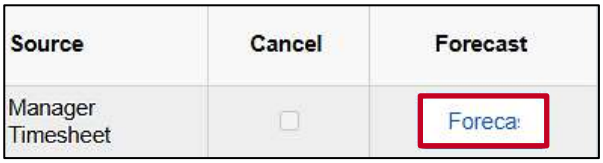
17.	Review the total number of absence hours in the **Duration** field and ensure accuracy.



18.	Optionally enter comments for the Approver in the **Reporter Comments** field.

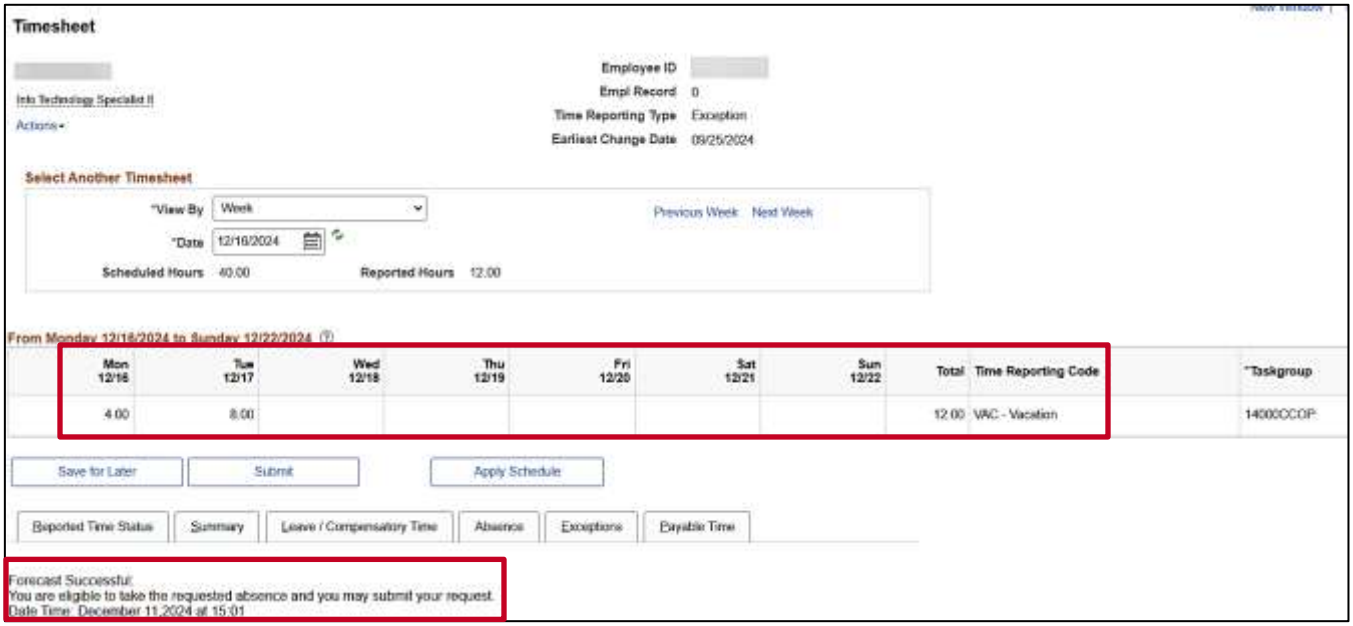
19.	Click the **OK** button.



Step	Action
	The **Timesheet** page returns. 
16.	Click the horizontal scrollbar as needed to scroll over to the right side of the page.
17.	Click the **Forecast** button. 
	Most Absence Types must be forecasted successfully in order to be submitted for approval. This is true regardless of whether the Absence Event being entered is historical, current, or future dated.

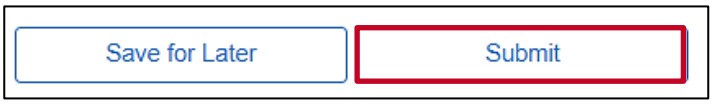
Step	Action

The page refreshes and a Forecast Successful message displays. Additionally, the absence hours are now displayed in the **Timesheet** grid with the corresponding Time Reporting Code.

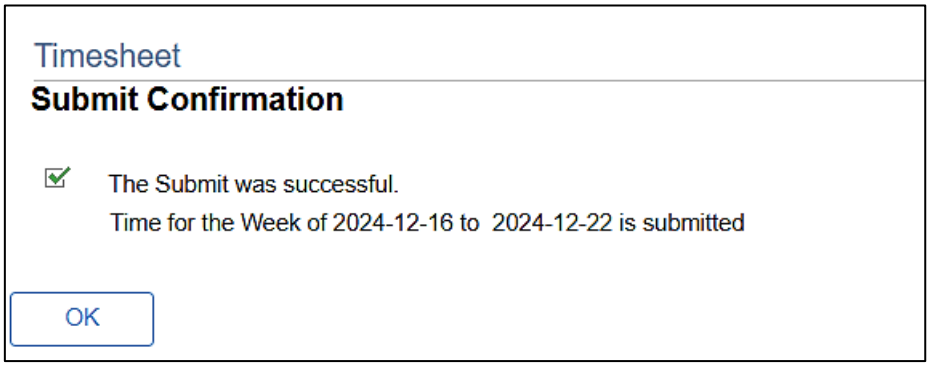


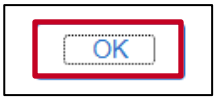
If the forecast is unsuccessful, the employee does not have a sufficient balance for the selected absence type. Update the absence type or duration as needed until the Absence Event can be forecasted successfully.

18. Click the **Submit** button.

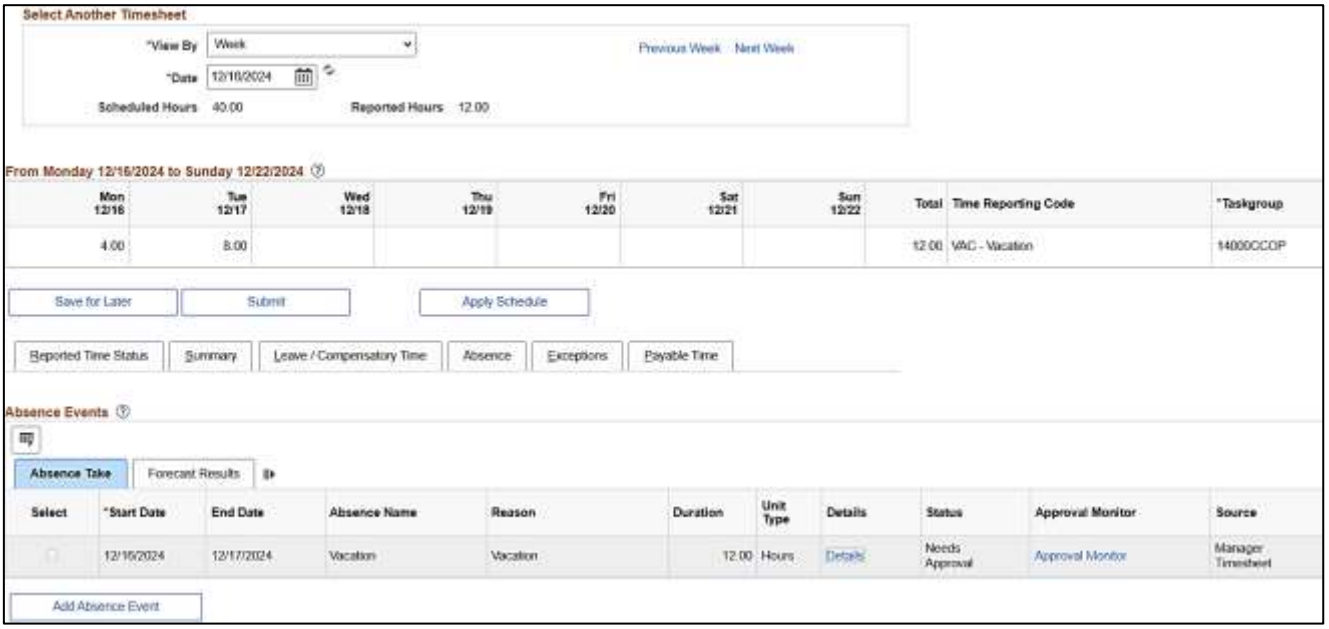


The **Submit Confirmation** page displays.



Step	Action
19.	Click the **OK** button. 

The **Timesheet** page returns.



Vacation hours require approval before they can be processed. Notice the status for the Absence Event is now “Needs Approval”.

Details	Status	Approval Monitor	Source
Details	Needs Approval	Approval Monitor	Manager Timesheet

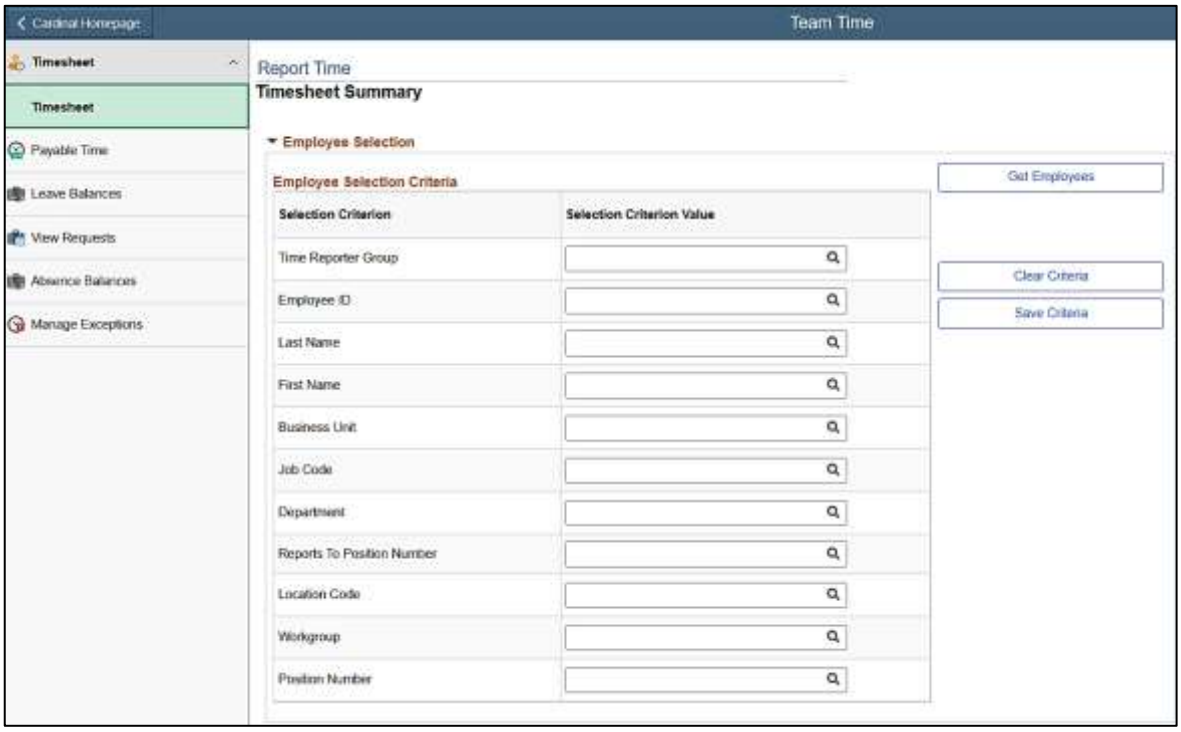
Editing an Absence Event

In this scenario, an Absence Event that was previously submitted for an employee will be edited. The original request was for 2 days of vacation and needs to be updated as the first day of vacation will be adjusted to 4 hours.

Note: This scenario only applies to agencies using Cardinal Absence Management.

Step	Action
1.	Navigate to the **Timesheet** page using the following path: **Team Time Tile > Timesheet**

The **Timesheet Summary** page displays.

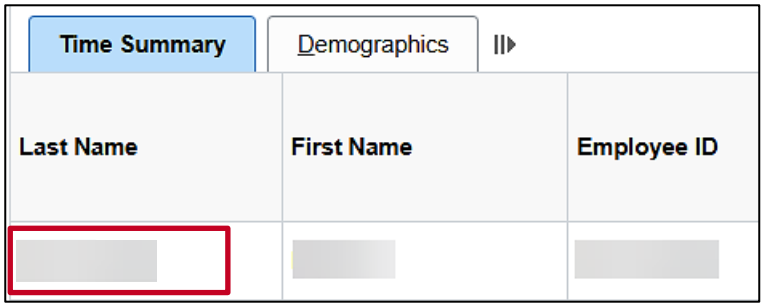


2.	Enter the Employee ID or known portion of the Employee ID in the **Employee ID** field.

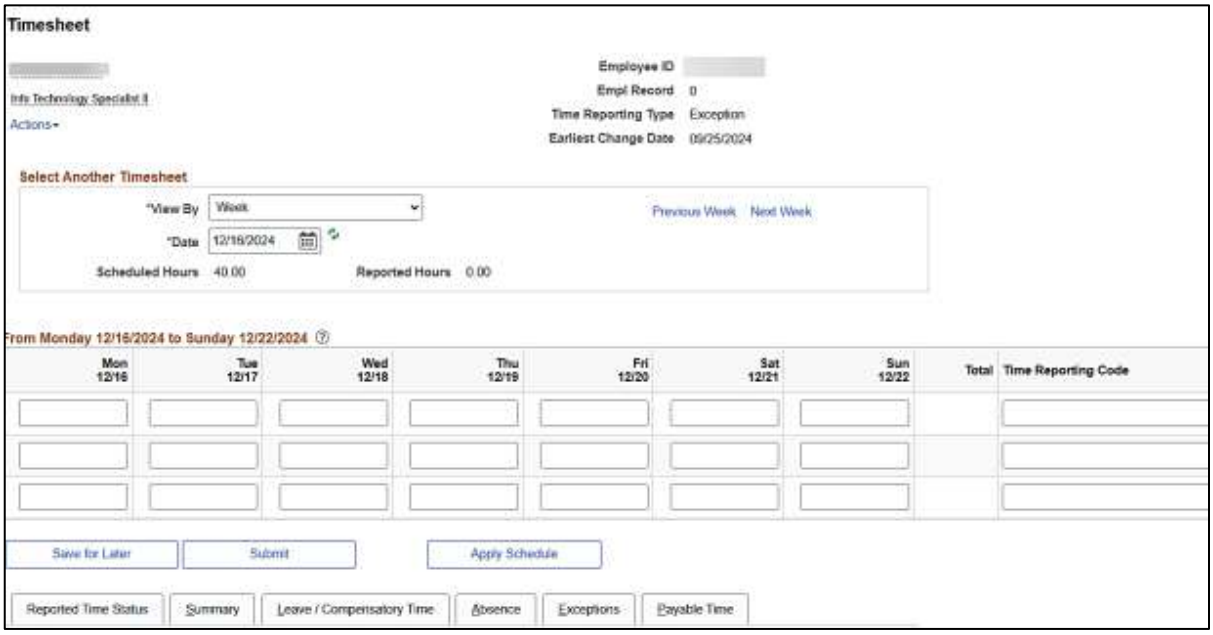
	Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

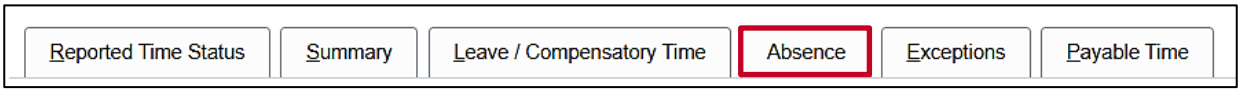
Step	Action
3.	Click the **Get Employees** button.

The **Search Results** display on the bottom portion of the **Timesheet Summary** page.

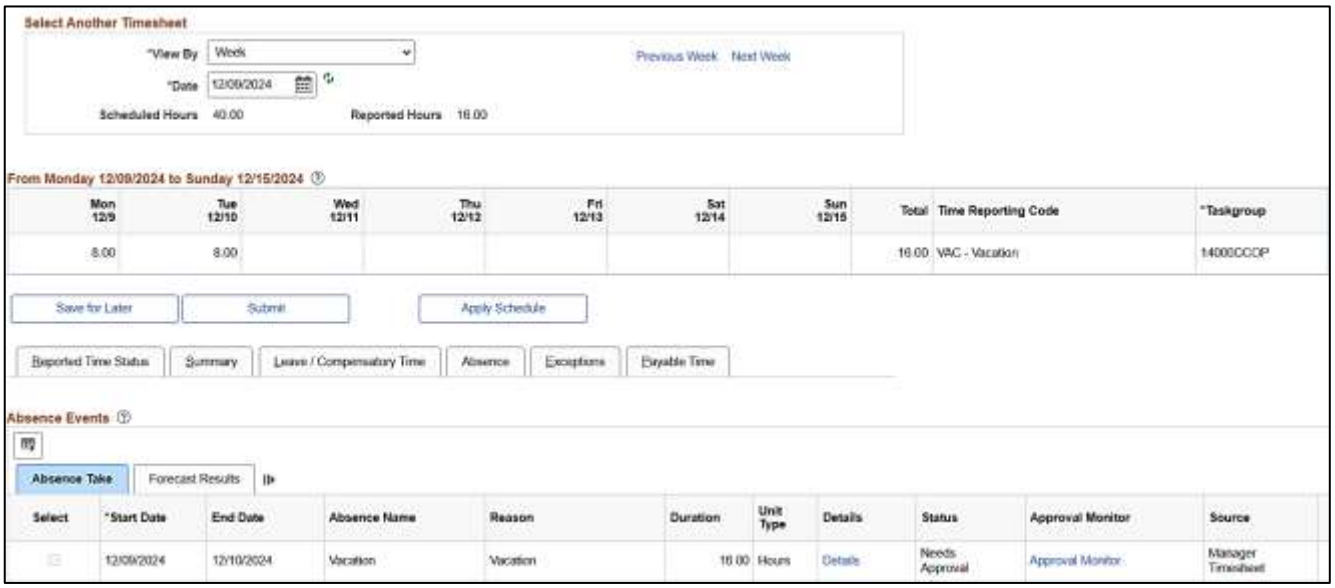
4.	Click on the **Last Name** link for the applicable employee. 

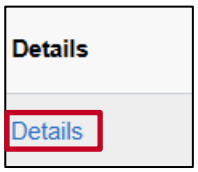
The **Timesheet** page displays for the applicable employee.



Step	Action
	If the correct week is not displayed, use the **Previous Week** link, **Next Week** link, or **Date** field to navigate to the correct week.
5.	Click the **Absence** tab. 

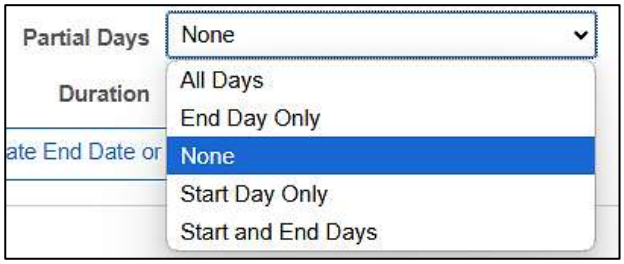
The **Absence Events** section displays.



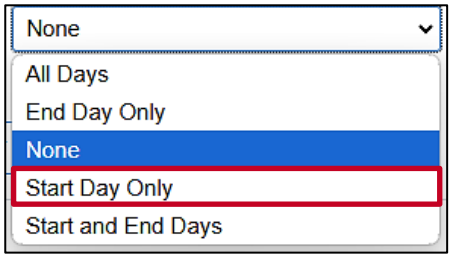
Step	Action
6.	Click the **Edit** button for the absence that needs to be adjusted.
7.	Click the **Details** link. 

Step	Action
	The **SS Create Absence Req** page displays in a pop-up window.

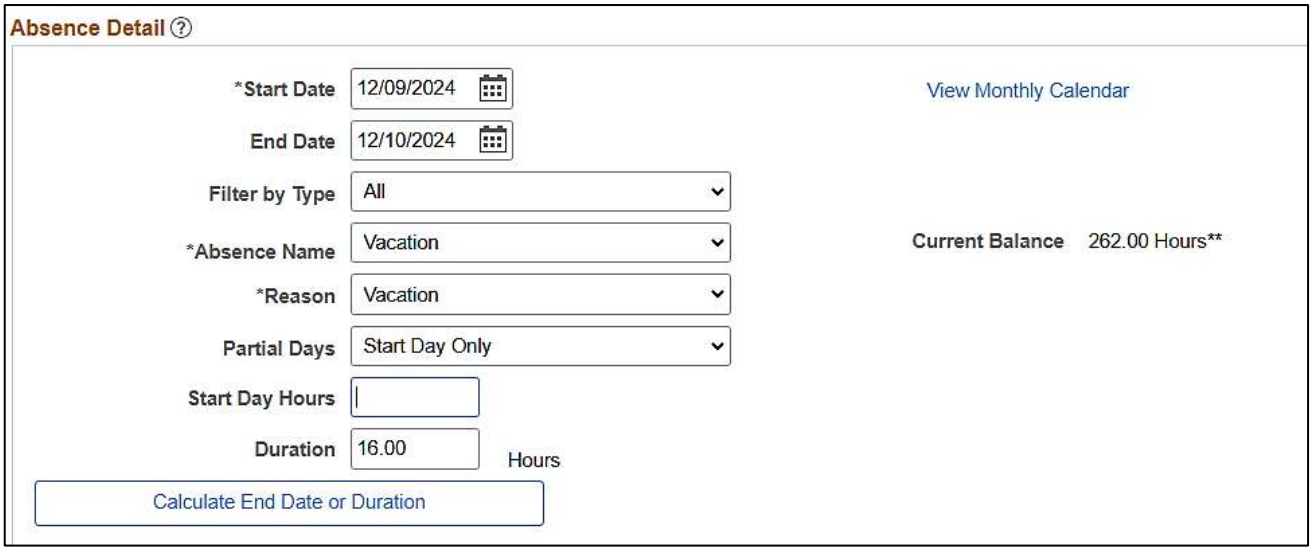
8.	Click the **Partial Days** dropdown menu to update the first day to a partial day.



9.	Click the **Start Day Only** option from the list menu.



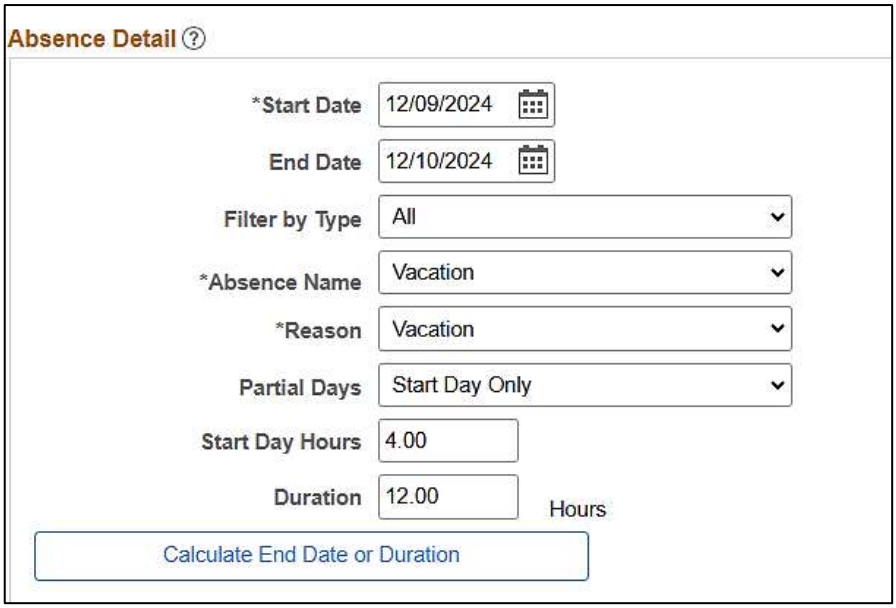
Step	Action
	The **SS Create Absence Req** page returns and the selected **Partial Days** option displays.



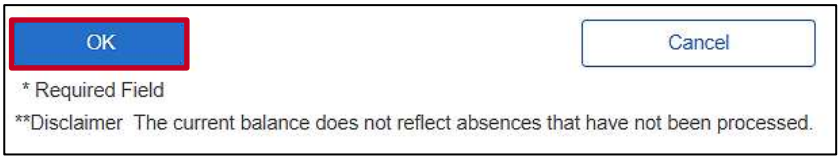
10.	Enter the partial hours in the **Start Day Hours** field. In this scenario, **4.00** hours was entered.
11.	Click the **Calculate End Date or Duration** button to calculate the hours based on the adjustment.

Step	Action

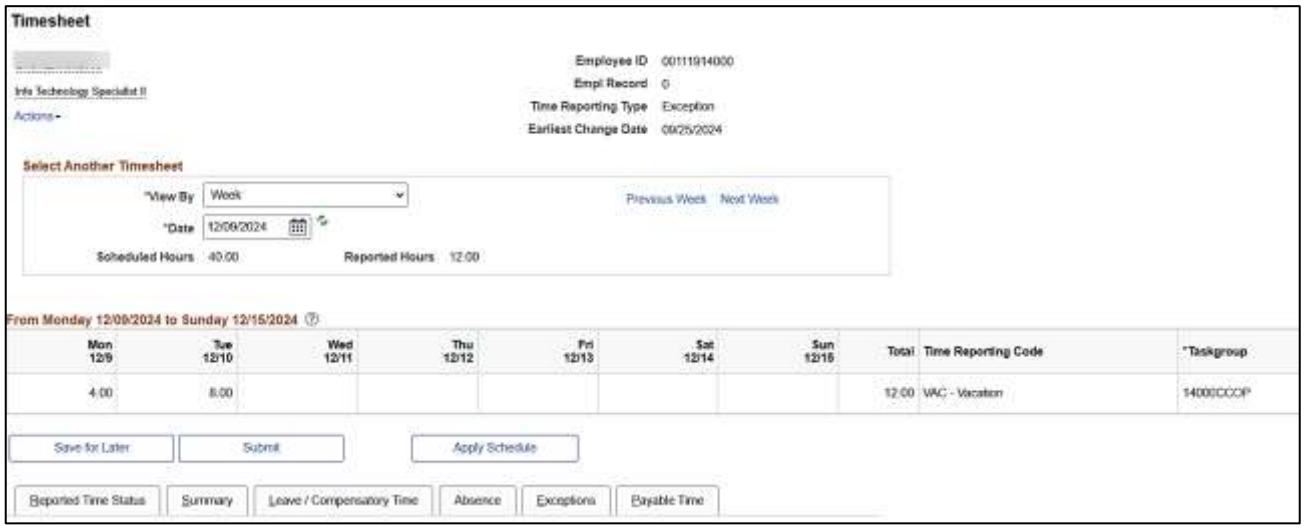
The hours in the **Duration** field update.

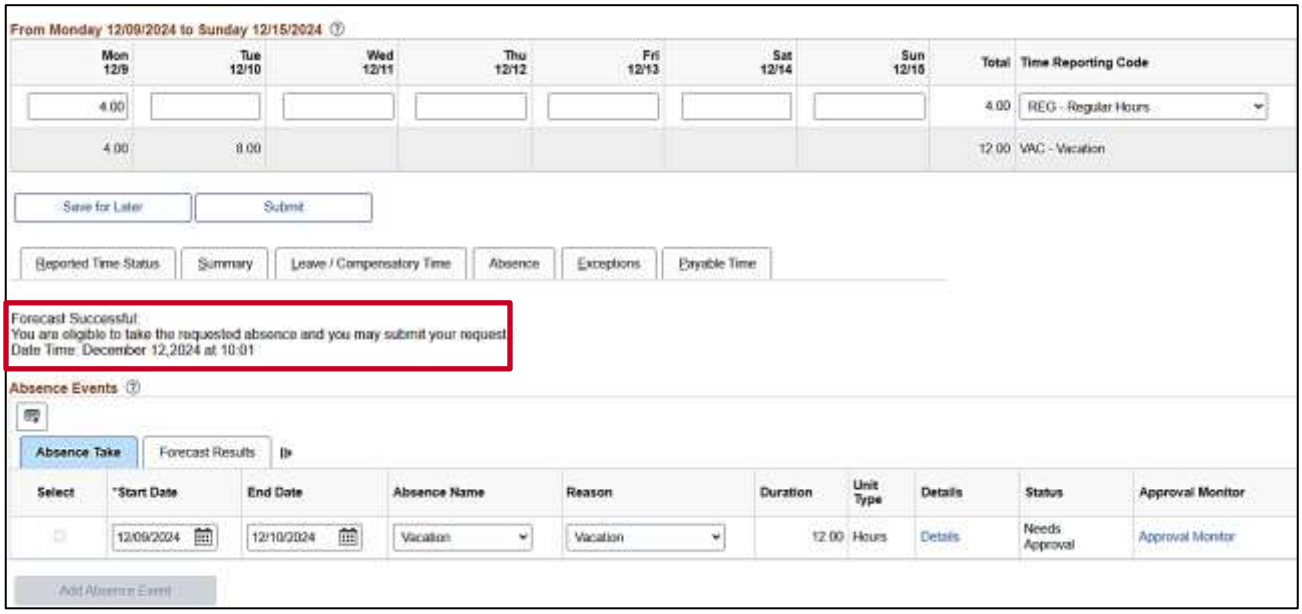
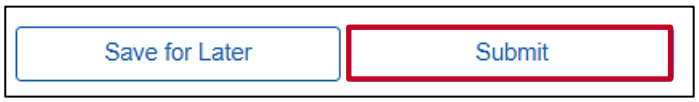


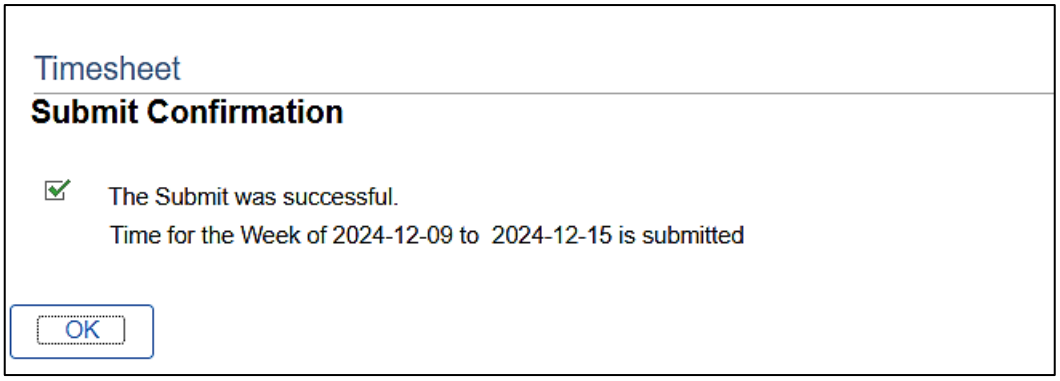
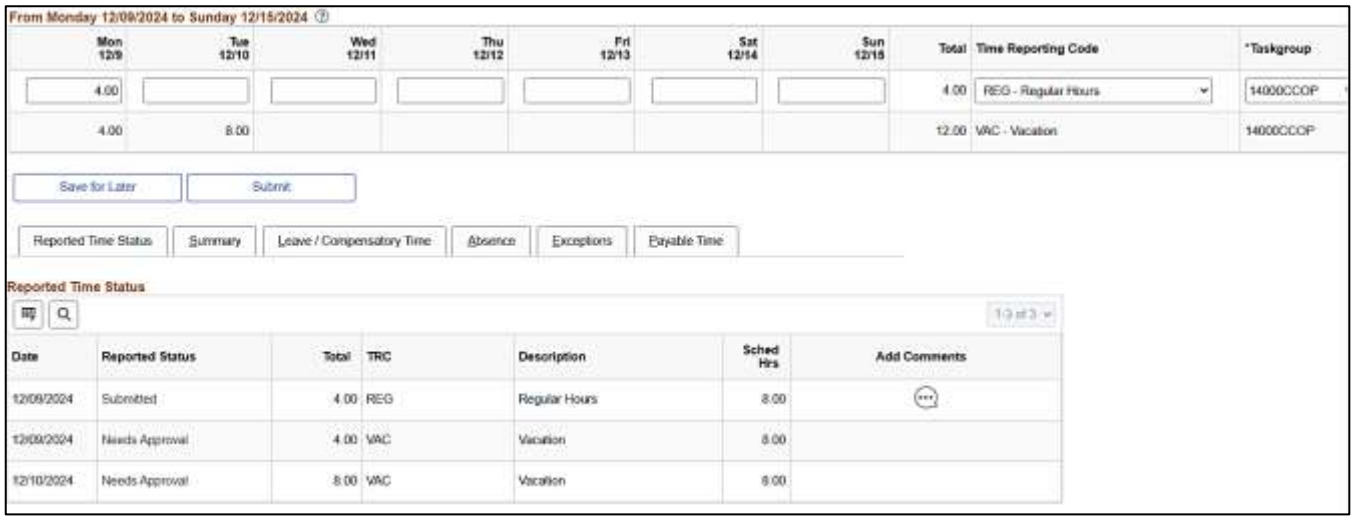
12. Click the **OK** button.



The **Timesheet** page returns.



Step	Action
13.	Click the **Forecast** button to verify that the time requested is available.
The **Forecast Successful** message displays above the **Absence Events** section. 	
	If needed, report any additional time required in the Time Entry grid. In this Scenario, 4 hours are added in the Monday field on the row for the **REG-Regular hours** TRC**.**
14.	Click the **Submit** button. 

Step	Action
	The **Submit Confirmation** page displays. 
15.	Click the **OK** button.
	The **Timesheet** page returns. 
	Vacation hours require approval before they can be processed.

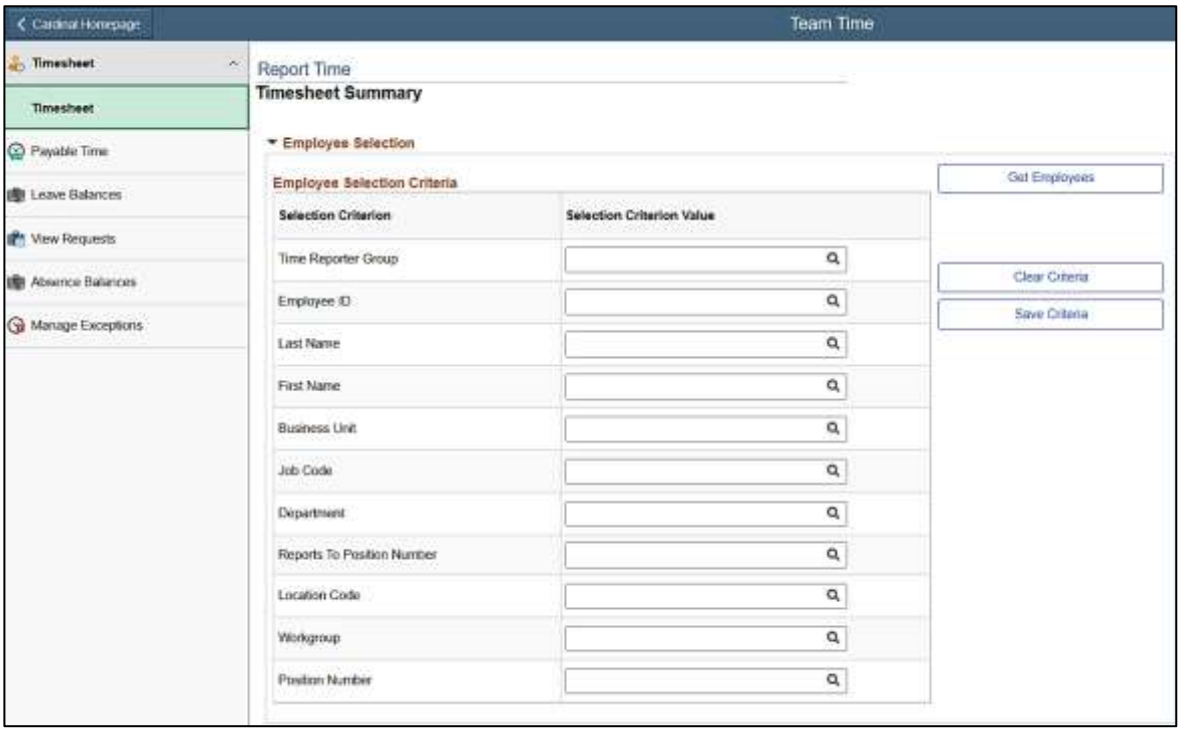
Cancelling an Absence

In this scenario, an absence that was requested and submitted for an employee will be cancelled.

Note: This scenario only applies to agencies using Cardinal Absence Management.

Step	Action
1.	Navigate to the **Timesheet** page using the following path: **Team Time Tile > Timesheet**

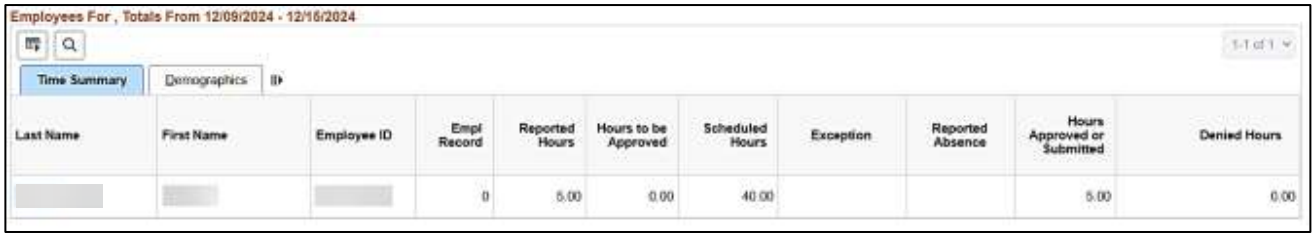
The **Timesheet Summary** page displays.



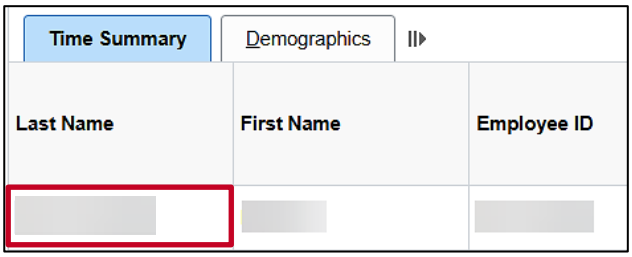
2.	Enter the Employee ID or known portion of the Employee ID in the **Employee ID** field.
	Users can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.
3.	Click the **Get Employees** button.

Step	Action

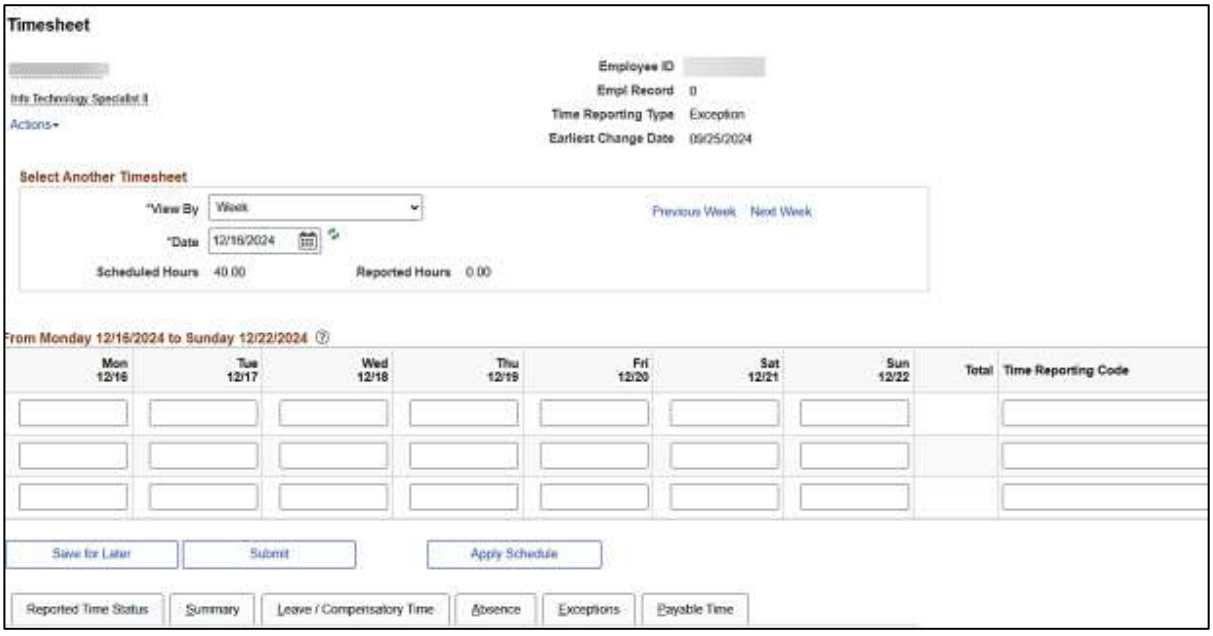
The **Search Results** display on the bottom portion of the **Timesheet Summary** page.



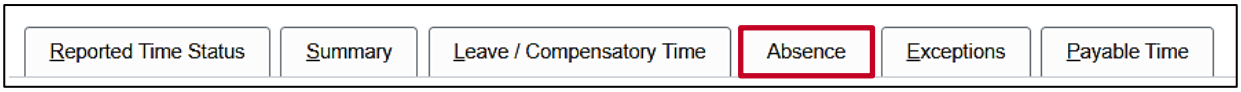
4. Click on the **Last Name** link for the applicable employee.



The **Timesheet** page displays for the applicable employee.

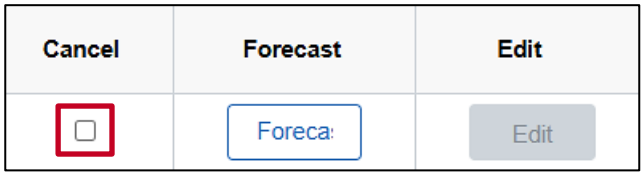


If the correct week is not displayed, use the **Previous Week** link, **Next Week** link, or **Date** field to navigate to the correct week.

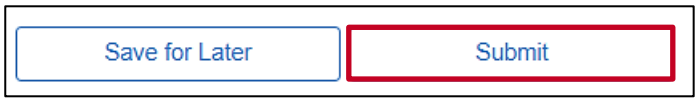
Step	Action
5.	Click the **Absence** tab. 
	The **Absence Events** section displays.
6.	Click the **Edit** button for the absence that needs to be adjusted.

Step	Action
	The absence displays for editing.

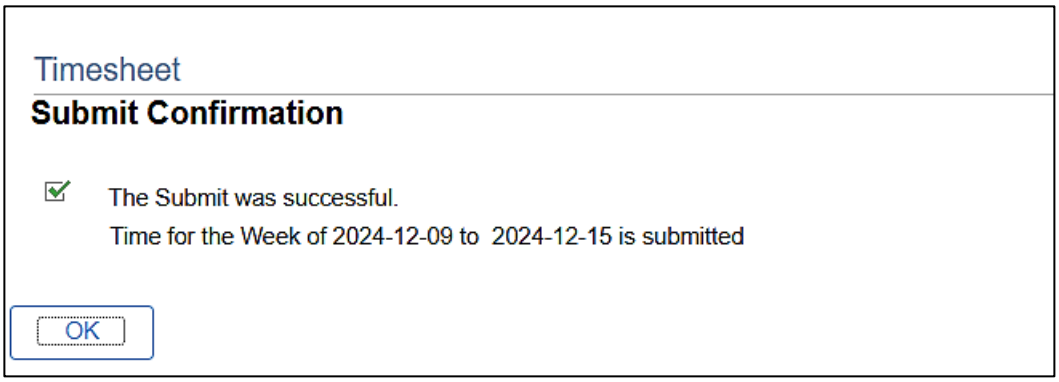
7.	Click the **Cancel** checkbox.



8.	Click the **Submit** button.

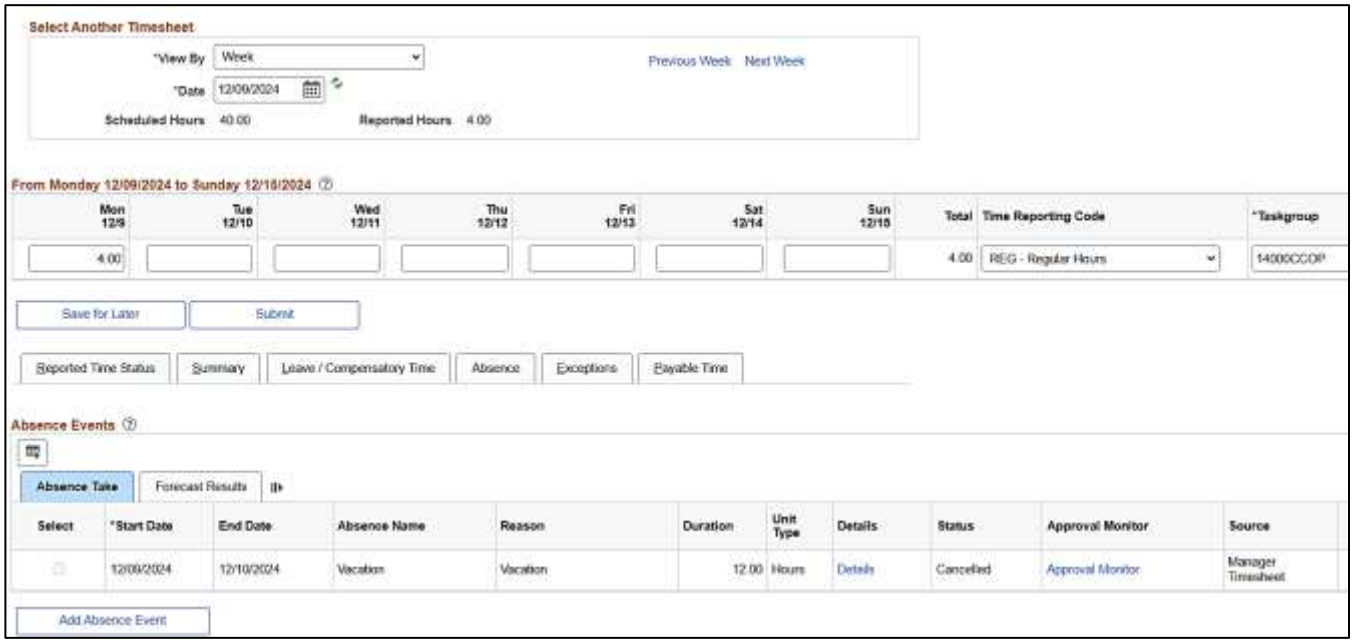


The **Submit Confirmation** page displays.



Step	Action
9.	Click the **OK** button.

The **Timesheet** page returns.



	Scroll down as needed to verify the absence does not appear on the Timesheet or in the reported time status information to confirm that the absence has been canceled.