

Cardinal HCM - What You Need to Know for Leave Year End

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To: Cardinal Project <ProjectCardinal@doa.virginia.gov>



The Cardinal Newsletter - January 6, 2023

This newsletter is being sent to ESS users with Absence Management (AM), AM Supervisors, AM Administrators, and TL Admins of PSB agencies.

Checking Leave and Absence Balances for ESS Users

Agencies using Cardinal Absence Management (AM) as their leave system of record are able to view leave and absence balances in Cardinal. As a reminder, Cardinal follows [DHRM Policy](#) and the leave year for classified employees is January 10 - January 9. The Executive Leave plan (available only to Governorial Appointees) is established for January 15 – January 14. Please review the [Executive Leave policy](#) prior to this date.

Questions about leave and absence balances should be directed to your agency Absence Administrators.

Absence and Leave balances can be viewed by Employee Self-Service (ESS) users under the **Time** tile, below are some of Cardinal Carl's favorite pages:

Comprehensive Absence Summary provides high-level balances for all types of leave, including current Vacation Accrual Rate, leave year-to-date hours (earned and taken), current balances as of the last closed leave period, and details on leave types that expire.

View Comprehensive Absence Summary

Employee ID: Test Info Technology Spec III
 Vacation Accrual Rate: 6.000000

Leave Type	Description	Balance Forward	Earned YTD	Taken YTD	Adjusted YTD	Donated YTD	Current Balance	Expired Balance	Maximum Allowable
1 OCL	Compensatory Leave Taken		44.00				44.00		
2 CSL	Volunteer Service Leave				16.00		16.00		
3 ERL	Org Recognition Leave			8.00	8.00				
4 OCL	Overtime Leave Taken								240.00
5 PER	VSDP Personal Leave			27.50	27.50				
6 SDP	VSDP Sick Leave			12.00	61.50		49.50		
7 VAC	Vacation		72.00	78.00	305.00		299.00		288.00

Expiring Leave Types - History Details

Leave Type	Description	Earned Date/Taken Date	Earned Hours	Taken Hours
1 ERL	Org Recognition Leave	05/09/2022	8.000000	

Expiring Leave Types - Balance Details

Leave Type	Total Earned	Total Taken	Balance
1 COMP_LEAVE	44.000000		44.000000

Leave Balances provides Compensatory Leave and Overtime Leave balances, earned and taken, as of the current week.

Leave Balances

[Return to Leave Balances](#)

Leave Balance

COMP_LEAVE Balance	Minimum Balance	Maximum Balance
44.00	0	1000

Leave Balance Details

Accrual Date	Earned	Taken	Balance
07/27/2022	1.50	0.00	44.00
07/26/2022	1.00	0.00	42.50
07/25/2022	1.50	0.00	41.50

The **Forecast Balance** button, located on the bottom of the **Absence Balances** page, can be used to project a future absence balance.

As Of 08/24/2022	0.00 Hours
Emergency Service Volunteer As Of 08/24/2022	0.00 Hours
Educational Leave Pay Docking As Of 08/24/2022	0.00 Hours
Educational Leave w/ Pay As Of 08/24/2022	0.00 Hours
Victim of Disaster As Of 08/24/2022	0.00 Hours
Converted Disability Credits As Of 08/24/2022	0.00 Hours
Donated Leave Rec (Lv Share) As Of 08/24/2022	0.00 Hours
Bone Marrow/Organ Donations As Of 08/24/2022	0.00 Hours
Pre-disciplinary leave 2 As Of 08/24/2022	0.00 Hours
Pre-disciplinary leave 1 As Of 08/24/2022	0.00 Hours
Military Leave Disaster **Disclaimer The current balance does not reflect absences that have not been processed.	

→ **Forecast Balance**

As of Date: 01/09/2023
Filter by Type: All
*Absence Name: Vacation
Current Balance: 299.00 Hours**

Forecast Balance [View Forecast Details](#)

Cardinal Absence and Leave Reminders for Supervisors and Administrators

Absence and Leave balances for employees can be viewed by AM Supervisors and Administrators on many of the same pages as ESS users under the **Team Time** tile. Cardinal recommends using the following reports for **Supervisors and Administrators** in reviewing Leave Year End information:

Employee Leave Report (RTA010) provides the same information available on the employee's Comprehensive Absence Summary page, including summary and detailed leave balance information (absences accrued/taken by an employee) and related detail transactions (if selected) for individual employees, a designated organization unit, or designated group of organization units.

Navigation: Navigator > Global Payroll & Absence Management > Absence and Payroll Processing > Reports > Employee Leave Report

Potential Vacation Leave Forfeiture Report (RTA012) provides projected vacation balances as of a future specified date. Enter 01/09/2023 as the Pay Period End Date to project vacation balance as of the leave year end. The report will use the current balance as of the last closed leave period, project expected accruals for the remainder of the leave year, and show if the balance is expected to be over the maximum carry forward limit. The projected balance does not factor in unprocessed absence events. The maximum carry forward amounts in the report include the maximum carryover allowable defined by DHRM, plus the final accrual projected to be entitled on Monday, January 9, 2023 and available for use on January 10, as the final accrual is not to be counted against the carry forward limit (per DHRM policy).

Navigation: Navigator > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Reports > Potential Leave Forfeiture Rpt

Vacation Leave Lost Query (V_TA_FOREITED_VA_HRS) is intended to be run after the leave year end processing has occurred to view the actual vacation hours forfeited, due to being in excess of the maximum carry forward limit.

Navigation: Navigator > Reporting Tools > Query > Query Viewer > V_TA_FORFEITED_VAC_HRS

For more information about running a query and/or report in Cardinal, see the job aids titled [NAV225 Running an HCM Query](#) and [NAV225 Generating an HCM Report](#).

Cardinal Leave Year End Processing and DHRM Policy

The Leave Year End processing to finalize the period ending January 9 and calculate the annual carryover/forfeiture and new year entitlements effective January 10, will occur in Cardinal on **Friday, January 13, 2023**. **There is no lockout period** and absences can continue to be reported for dates in the old and new leave years, **up to 90 days** in the past and 90 days in the future. Forecasting and the Absence Calculation process will deduct approved absences from the balance available as of the date the absence is reported.

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

Annual Leave/Vacation (Policy 4.10): Remaining balances will be carried over into the new leave year starting January 10th, subject to the maximum amounts as defined by the policy.

Annual Leave Incentive (Policy 4.10 and 3.05): Remaining balances will be carried over into the new leave year starting January 10th and do not automatically expire in Cardinal.

Recognition Leave (Policy 1.15): Unused hours automatically expire in Cardinal 12 months from the leave period the balance adjustment is granted in. Recognition Leave hours converted into Cardinal in

leave period the balance adjustment is granted in. Recognition Leave hours converted into Cardinal in 2022 will expire 12 months from the conversion date (3/24/2023 for Release 2 agencies and 9/24/2023 for Release 3 agencies).

Compensatory Leave (Policy 3.10): Unused hours automatically expire in Cardinal 12 months from the date earned. Comp Leave hours converted into Cardinal in 2022 will expire 12 months from the conversion date (3/24/2023 for Release 2 agencies and 9/24/2023 for Release 3 agencies).

VSDP Personal Leave and VSDP Sick Leave (Policy 4.57) and Volunteer Service Leave (Policy 4.40): Remaining balances will automatically be forfeited effective January 10th and balances for the new leave year will automatically be entitled and available for use effective January 10th. *Note: Employees on Leave of Absence-Unpaid or Suspension on January 10th will not receive annual entitlements; AM Administrators must manually give the entitlements via balance adjustments in the period the employee returns if applicable.

Family and Medical Leave (Policy 4.20): Remaining FML balances will not be carried forward on January 10th. AM Administrators must enter new FML balance adjustments in the first calendar of the new leave year for employees on an active approved FML leave as needed.

See the [Absence Management Leave Types & Eligibility](#), an excel document, can be directly accessed on the [Cardinal Website > Learning > Job Aids](#). Search "Leave Types" and select "Time & Attendance" in the **Module** field then click the **Filter** button.

Note: This excel document contains information on all leave types (column F on the Absence tab indicates if balances carryover into the new leave year), including Eligibility Groups and leave types used by agencies that do not follow DHRM policy.

For at-will employees enrolled in the Absence Management Executive Eligibility Group (EXECELGGRP), VSDP Personal Leave and VSDP Sick Leave will entitle the same as classified employees. The All Purpose Leave should be manually adjusted by AM Administrators under the Annual Leave Incentive (ALI) leave type in the first semi-monthly calendar period of the leave year, by following the entitlements and carryover limits in the Executive Leave policy.

Balances for leave types that do not automatically entitle in Cardinal, including Executive leave, can be adjusted by AM Administrators to add or remove hours via two different options.

- Manually, see the [Managing Absence Balances](#) job aid
- [Leave Balance Adjustment Mass Upload Template](#)
 - For specific instructions on this upload review the first tab of the template.
 - Use the [Performing a Mass Upload](#) job aid for information on uploading.
 - [Navigation: Cardinal Website > Resources > Cardinal HCM Update Templates](#)

A Note from the Cardinal Project Team...

Attention: Please do not delete, block, unsubscribe, or tag this email as spam. There is important Cardinal HCM information in this newsletter that you won't want to miss.

To learn more about the Cardinal HCM Project, please visit our website at <https://www.cardinalproject.virginia.gov/>.

If you have any questions concerning the contents of this communication, please send an email to projectcardinal@doa.virginia.gov.

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