



TA374

Absence Management Maintenance

Instructor Led Training



Revision History

Revision Date	Summary of Changes
3/1/2025	Baseline



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

The following HCM training materials are located on the Cardinal website (www.cardinalproject.virginia.gov) under Learning:

- Job Aids on topics across all functional areas
- Functional process and instructional videos

The Cardinal HCM Reports Catalog is located on the Cardinal website under Resources.

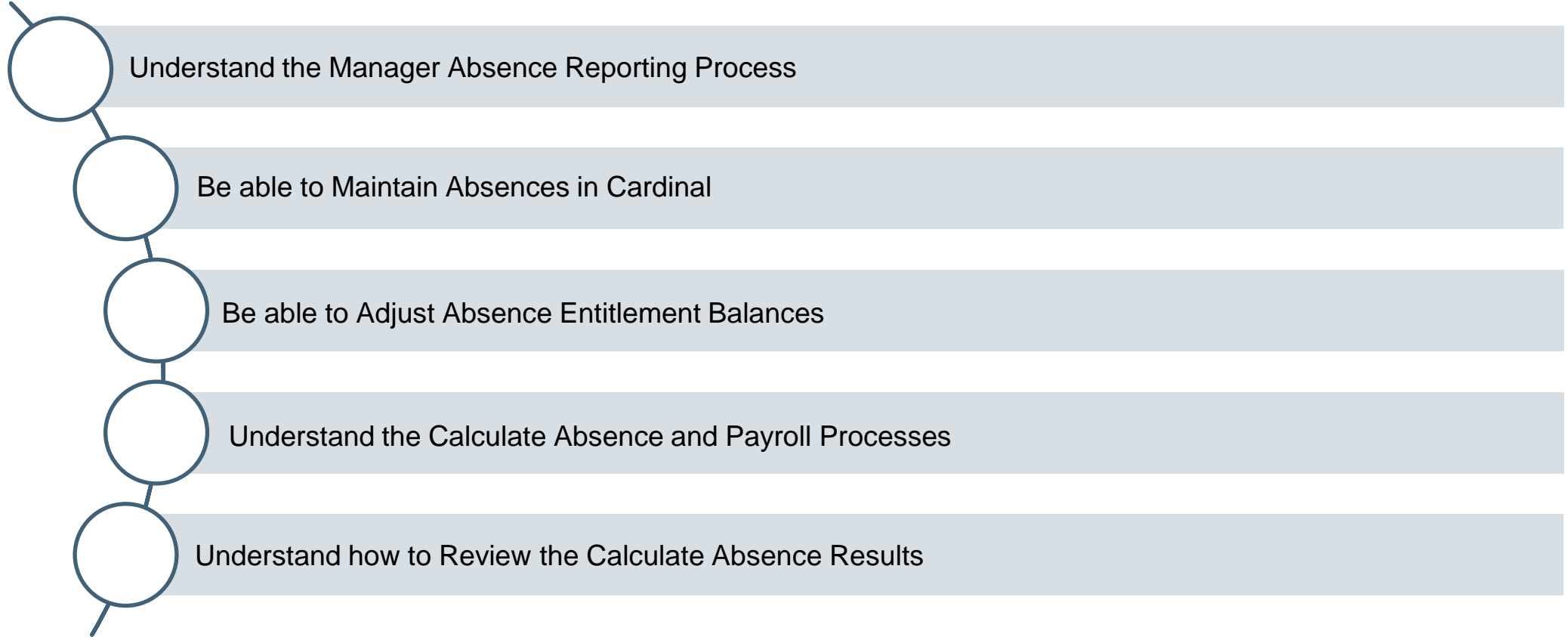
The system screenshots included in the Cardinal HCM training courses show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



Course Objectives

After completing this course, you will:





Agenda

1

Absence Management Overview

2

Reviewing Absence and Leave Balances

3

Entering and Modifying Absence Events

4

Managing Extended Leave

5

Adjusting Absence Entitlement Balances

6

Calculating Absence and Payroll Processing



Lesson

1

Absence Management Overview

This lesson covers:

- Overview of Cardinal HCM
- Time & Attendance Core Modules
- Overview of Absence Management
- TA Setup and Processing Process
- The Role of the Absence Management Administrator
- Key Absence Management Concepts



Cardinal HCM Responsibilities and Relationships

In Cardinal HCM, HR Administrators, BN Administrators, TL Administrators, Payroll Administrators and State Payroll Operations (SPO) work together so that all employees are paid on time and accurately and are benefited properly.

All these roles and their unique responsibilities flow to one another in order to ensure that all employee records are accurate and up-to-date.

State Payroll Operations (SPO)

- Defines Operations Calendar
- Runs Payroll Processes
- Runs Year End Processes



Accurate
Paycheck
and Benefits



Human Resources (HR)

- Position
- Personal Data
- Job Data

Benefits (BN)

- Medical
- Flexible Spending Accounts (FSA)
- Retirement

Time & Attendance (TA)

- Time Entry
- Absence Entry
- Approvals

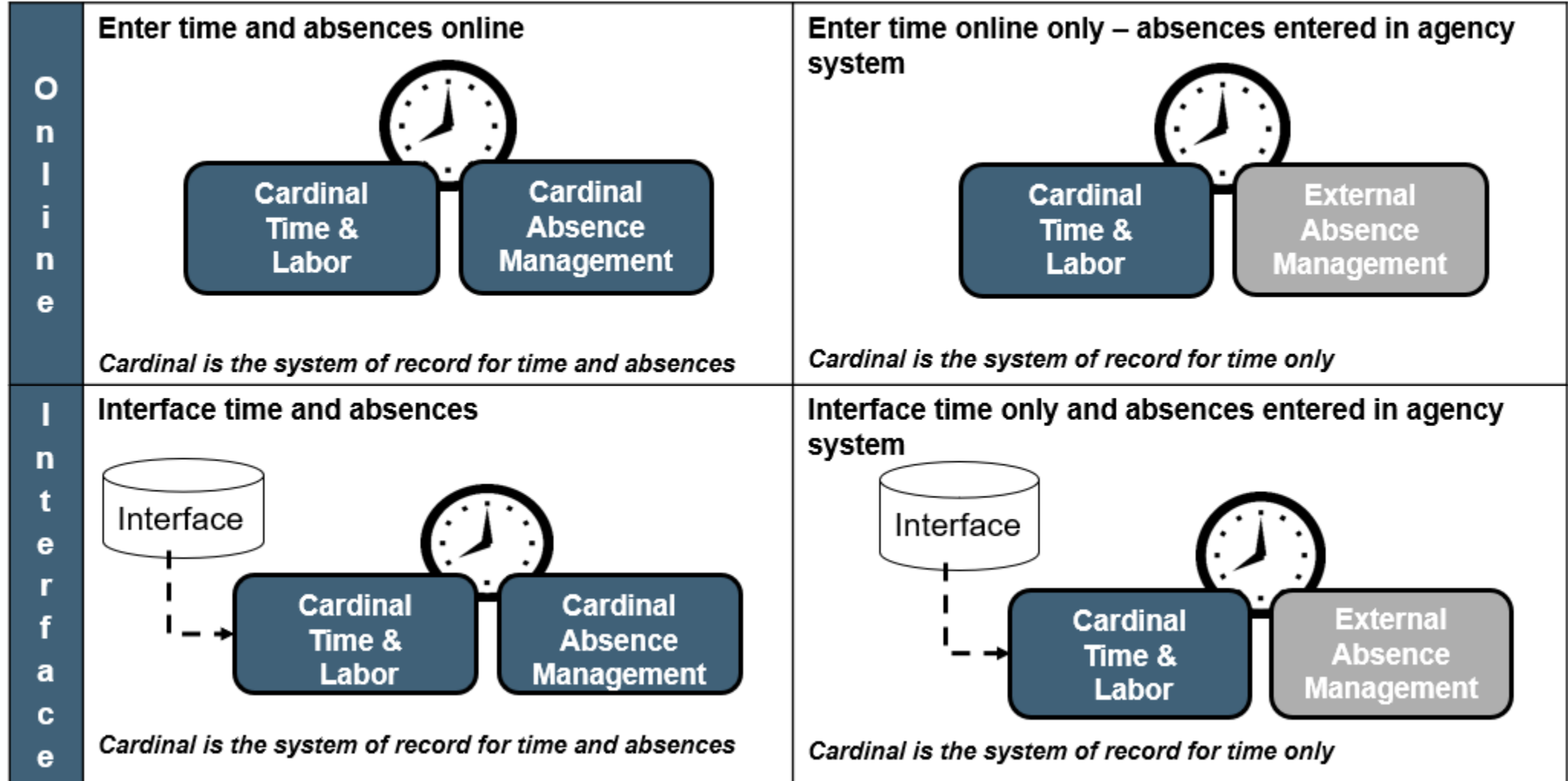
Payroll (PY)

- Earnings
- Deductions
- Taxes
- Review Paychecks



Time & Attendance – Core Modules

Cardinal Time & Attendance (TA) has two core modules: Time and Labor (TL) and Absence Management (AM). There are different agency configuration options (online/interfacing) which impact how time and absences are captured as well as what is the system of record for time and absences. The chart below breaks out the options for online and interfacing agencies.





Overview of Absence Management

The Cardinal Absence Management module records, processes, and tracks leave balances for employees at Agencies where Cardinal is the absence system of record.

Online Agencies:

- Eligible employees are enrolled in Absence Management during employee setup
- Employee Timesheets contain codes used to enter compensatory and overtime leave on the Timesheet and the **Absence** tab is used to enter other non-productive time (e.g., vacation, sick)
- Employee absences must be approved
- Employees can review leave balance and leave history pages

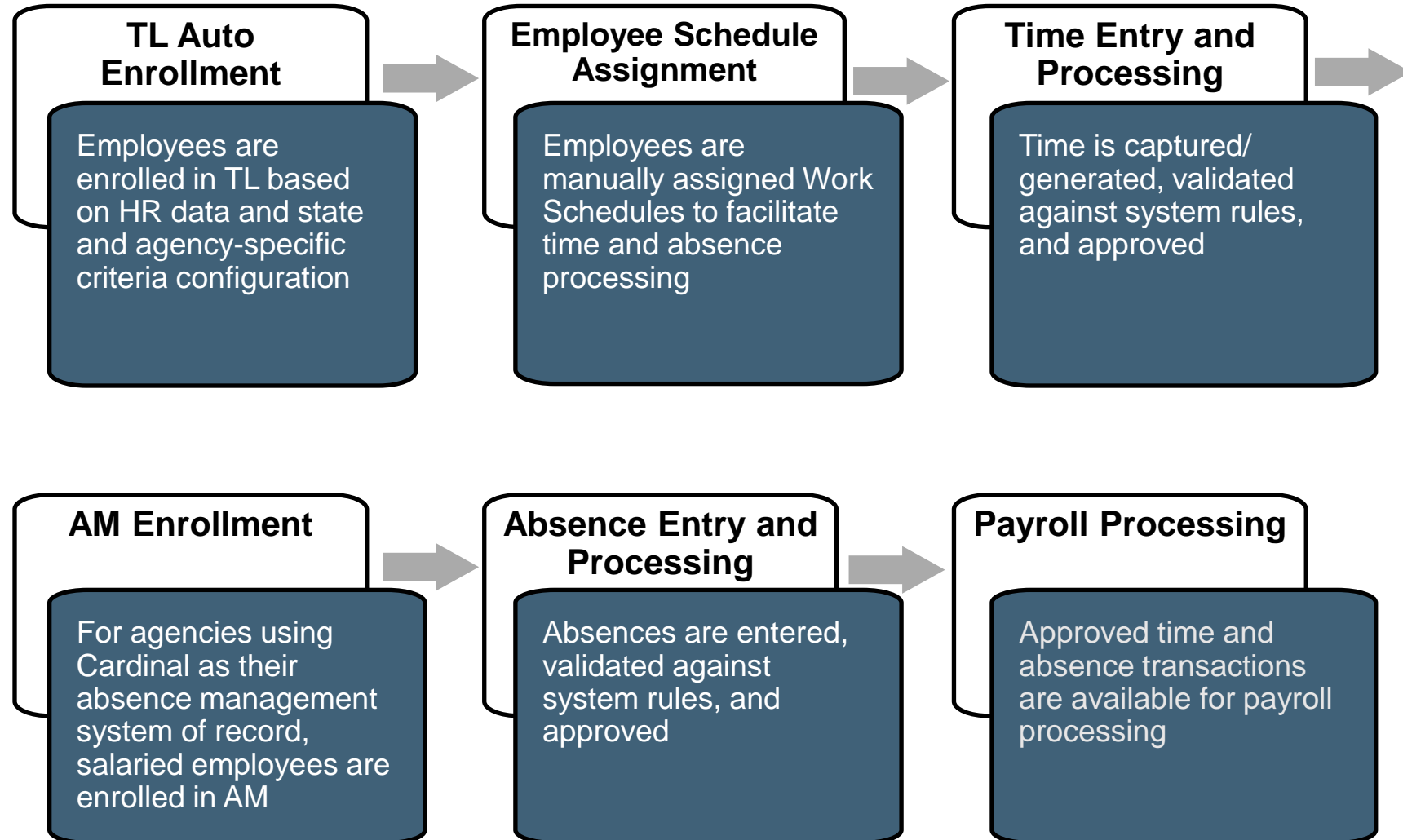
Interfacing Agencies:

- Eligible employees are enrolled in Absence Management during employee setup
- Agencies interface absence data into Cardinal on a regular basis
- Interfaced absence requests are pre-approved
- Employees can review leave balances and leave history pages



TA Setup and Processing Overview

The flowchart below shows the flow for Time & Attendance from employee setup through data being sent to Payroll for processing. In this course, our focus is on absence entry and processing.





Role of the Absence Management Administrator

The Absence Management Administrator runs reports to ensure that all absences entered are approved or denied prior to time and absences being sent to Payroll.

Absence Management Administrators are responsible for the entry of extended leave such as:

- Family and Medical Leave (FML)
- Short Term Disability (STD)
- Long Term Disability (LTD)



Key Concepts

The following key concepts will be covered in this course:

- Absence balances displayed on the employee Timesheet and balance history pages are from prior closed pay periods and do not include accruals earned or hours taken after pay period end
- Adjustments can be made to absence takes and entitlements in a prior period
- Employees/Timekeepers and Managers can adjust absences 90 days in the past
- Absence Management Administrators can adjust absences up to 365 days in the past
- The Absence Calculation process processes approved absences and calculates entitlements and balances
- Absence Management Administrators should not approve absences on a regular basis
- Absence Management Administrators have access to some Time Reporting Codes (TRCs) that supervisors will not have access to (e.g., comp and overtime leave payout)



Absence Management Roles and Responsibilities

Absence Management Employee/Timekeeper	Absence Management Supervisor	Absence Management Administrator
<ul style="list-style-type: none">• Enter and modify absence events• View absence information• View compensatory and overtime leave balances	<ul style="list-style-type: none">• Review/Approve absences for direct reports• Enter absences on behalf of direct reports• Review direct reports' leave taken• Cancel or modify direct reports' absences• Review direct reports' absence balances and history• Delegate their own approval responsibility• Run Time and Attendance reports	<ul style="list-style-type: none">• View Absence Calculation results• Review/Correct/Approve reported absences• Have TRC Administrator level access on Timesheets• Enter/Modify/Cancel/Delete/Void absence events• View/Adjust absence balances• Enter Leave Donation and FMLA balance adjustments• View employee time reporting information• View Work Schedules for employees• View comp time and overtime leave plans for employees• View TL Eligibility and TL Auto Enroll Bypass• Have view only access to Job Data pages that impact TL Auto Enroll• Run Time and Attendance reports



Lesson Summary

1

Absence Management Overview

In this lesson, you learned:

- An overview of Cardinal HCM
- Time & Attendance Core Modules
- An overview of Absence Management
- The TA Setup and Processing Process
- The Role of the Absence Management Administrator
- Key Absence Management Concepts



Lesson

2

Reviewing Absence and Leave Balances

This lesson covers:

- Reviewing Employee Absence Balances
- Reviewing Employee Leave Balances



Reviewing Absence/Leave Balances

Cardinal is configured to align with Commonwealth policy on leave and absence types and, if applicable, their forfeiture or expiration. For example, if an employee is only entitled to carryover a set number of vacation hours at the end of the leave year, then any hours more than that amount are automatically removed by Cardinal.

Employees can view absence/leave balances and expiration information on the **Leave Balances** page (balances only), the **Compensatory Time** page, or on the Employee Leave Report.

Absence Management Administrators may need to make manual adjustments to absence or leave balances to resolve issues.

Timesheet

Leave Balances

Leave Balances

Security Officer III

[Return to Leave Balances](#)

Leave Balance

COMP_LEAVE Balance	Minimum Balance	Maximum Balance
0.00	0	120

Leave Balance Details

Accrual Date	Earned	Taken	Balance
05/31/2012	0.00	8.00	10.00
03/08/2012	0.00	8.00	18.00
02/05/2012	0.00	8.00	26.00
01/13/2012	8.00	0.00	34.00
12/23/2011	8.00	0.00	26.00
12/22/2011	2.00	0.00	18.00
11/25/2011	8.00	0.00	16.00
11/11/2011	8.00	0.00	8.00

Balances are as of the specified Accrual Date.

Compensatory Time

Security Officer III

[Actions](#)

Employee ID

Employment Record 0

Comp Time Balance Summary

Compensatory Time Off PlanCOMP_LEAVE

Expiration PeriodYears

Date05/18/2020

Period Count1

Balance at Start of Day24.00

*Show Time Expiring inNext 30 Days

Expiring Time Earned

Expiration Date	Quantity	Ending Balance
05/27/2020	8.00	16.00

[Return to Timesheet](#)

[Manager Self Service](#)

[Time Management](#)

[Return to Timesheet](#)



Reviewing Absence/Leave Balances (continued)

Absence Administrators may need to review an employee's current absence/leave balance to determine if any additional actions are required. Leave balances are available to view whether your Agency enters transactions directly in Cardinal or uploads through the interface. However, where the absence/leave balances can be found in Cardinal depends on the type of absence/leave.

- Absence balances can be viewed on the following pages:
 - **Review Absence Balances** page
 - **Timesheet** page (**Absence** tab)
- Compensatory and Overtime Leave can be viewed on the following pages:
 - **Leave Balances** page
 - **Timesheet** page (**Leave/Compensatory Time** tab)



Lesson Summary

2

Reviewing Absence and Leave Balances

In this lesson, you learned:

- How to Review Employee Absence Balances
- How to Review Employee Leave Balances



Lesson

3

Entering and Modifying Absence Events

This lesson covers:

- Entering and Modifying Absence Events
- Entering Admin Only Time Reporting Codes



Entering Absences on the Timesheet page

Absences can be entered online in Cardinal using the Timesheet page. Depending on the agency set up, absences can be entered directly on the Timesheet or in the Absence grid on the Timesheet page.

If the Absence Event includes one or more partial days, select the applicable **Partial Days** option from the following:

Option	Description
All Days	Use if the days entered are all partial days. Select this option even when only taking one partial day
End Day Only	Use this when the last day only is a partial day
None	This is the default value. Do not change this if none of the days are partial days
Start Day Only	Use when the first day only is a partial day
Start and End Days	Use when the first and last days are partial days

Absence Detail ?

*Start Date07/17/2020

End Date07/17/2020

Filter by TypeAll

*Absence NameVacation

*Reason

All DaysEnd Day OnlyNoneStart Day OnlyStart and End Days

Partial Days

Duration

Calculate End Date or Duration

Note: For employees with a Variable Work Schedule, always select a **Partial Days** option because each day of a Variable Work Schedule represents 24 hours.



Partial Days Options – Variable Work Schedule

The **Partial Days** option must always be selected for Positive Time Reporters with a Variable Work Schedule because Variable Work Schedules are set up in the system as 24 hours a day 7 days a week.

If the **Partial Days** option of “None” is selected, Cardinal calculates each day as 24 hours.

When Partial Days Option None is Selected

Absence Detail ?

*Start Date 07/13/2020

End Date 07/13/2020

Filter by Type All

*Absence Name VSDP Sick Leave

*Reason VSDP Sick Leave

Partial Days None

Duration 24.00 Hours

Calculate End Date or Duration

When Partial Days Option All Days is Selected

Absence Detail ?

*Start Date 07/13/2020

End Date 07/13/2020

Filter by Type All

*Absence Name VSDP Sick Leave

*Reason VSDP Sick Leave

Partial Days All Days

All Days Hours 8.00

Duration 8.00 Hours

Calculate End Date or Duration



Absence Event Page Overview

The **Absence Event** page provides a consolidated view of all absence events for the employee within a selected date range and includes the absence take code, description, dates, duration, approval, and processing status. Absence Management Administrators can enter, modify, delete, or void an absence event on behalf of an employee for various reasons, whether absences were keyed online or interfaced.

Note: Compensatory and Overtime leave are entered and modified on the **Timesheet** page. All other absences are managed on the **Absence Events** page.

Navigate to the **Absence Event** page using the following path:

NavBar > Menu > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

For further information about updating/editing an Absence Event, see the Job Aid titled **TA374_Entering and Modifying Absences**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Interfacing Agencies

Interfacing Agencies are recommended to change/correct absence information in their source system so that it automatically uploads into Cardinal. This ensures that both systems are in sync and avoids the need to make adjustments in two systems.



Re-checking a Future Absence Event - Example

Example scenario:

- An employee has 24 hours of personal leave
- The employee requests to take 24 hours of Personal Leave for a trip two months from now and the Timekeeper enters the Absence Event. The forecast is successful, and the Absence Event is approved
- Two weeks later, after making the initial request, the employee takes 16 hours of Personal Leave
- The future Absence Event now becomes ineligible because the employee used 16 of their 24 hours
- By re-checking the balances, there will only be 8 hours of Personal Leave available (making 16 hours of the Personal Leave for the future Absence Event insufficient)
- If no action is taken, the Timesheet will be processed with 8 hours as Personal Leave (the remaining available balance) eligible and 16 hours as LNP (Pay Docking)
- To avoid pay docking, re-check the absence eligibility, edit the future Absence Event and use a different absence type for 16 hours



Deleting / Voiding an Absence Event

If a future dated Absence Event is no longer going to be taken by the employee, the Absence Event can be deleted or voided.

Note: If the Absence Event has already been approved, the Timekeeper will not be able to cancel it. In these cases, either the employee's Supervisor or an agency Absence Management Administrator will need to cancel it.

For further information about canceling an Absence Event, see the Job Aid titled **TA374_Entering and Modifying Absences**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Admin only TRCs

When you sign in and access an employee's Timesheet, there are some TRCs that are only available for Admins. TL and Absence Administrators are the only ones who can enter these specific codes on the Timesheet.

Some examples include:

- **CCA - Comp Time Leave Adjust**
- **CCD - Comp Time Leave Deduction**
- **CPO - Comp Time Leave Payout**
- **OCA - Overtime Leave Adjust**
- **OCD - Overtime Leave Deduction**
- **OPO - Overtime Leave Payout**

CCA - Comp Time Leave Adjust
CCD - Comp Time Leave Deduction
CCL - Compensatory Leave Taken
CLO - Office Closing
CPO - Comp Time Leave Payout
HCS - Holiday Straight Earned
HNPM - Holiday Pay Docking
HOLM - Holiday
HOS - Holiday Straight Pay Extra
OCA - Overtime Leave Adjust
OCD - Overtime Leave Deduction
OCL - Overtime Leave Taken
OCS - Comp Leave Earned
OCT - Overtime Leave Earned
OPO - Overtime Leave Payout
OVS - OT @ Straight Time
OVT - OT @ Time and Half
REG - Regular Hours



Lesson Summary

3

Entering and Modifying Absence Events

In this lesson, you learned:

- How to Enter and Modify Absence Events
- How to Enter Admin Only Time Reporting Codes



Lesson

4

Managing Extended Leave

This lesson covers:

- Managing Extended Leave Overview
- Entering and Approving Extended Leave



Managing Extended Leave Overview

As an Absence Management Administrator, you are responsible for entering extended leave in Cardinal for eligible employees. Once you have received documentation for an employee, the appropriate extended leave must be entered in Cardinal per Commonwealth and agency policies.

An employee's eligibility and approval for extended absences is determined by Human Resources. The HR Administrator is responsible for ensuring an employee's job data record reflects the appropriate status and other job values while an employee is on an extended leave.

Extended leave includes the following:

- Family Medical Leave (FML)
- Short Term Disability (STD/STL)
- Long Term Disability (LTD)
- Workers' Compensation (WCL/WCP/WCS/WCI)
- Disability Credits (DSK)



Managing Extended Leave Overview (continued)

The following job data values impact extended leave in Absence Management:

- **Action:** There are several action values that impact if an employee is calculated by the Absence Calculation process and the stopping/starting of some leave accruals relative to the effective date on the job record. The Action Reason code does not have any impact on absences
 - **Paid Leave of Absence, Long Term Disability with Pay, and Short Term Disability with Pay:** These job data actions keep employees in an active Leave with Pay status so that absences can be reported and processed by the Absence Calculation process. For employees on Leave for 90 plus days (unless LNP or DLR absences are used during a period), the semi-monthly accruals will cease after 90 consecutive days until the employee returns from leave
 - **Leave of Absence – Unpaid:** This Job Data action indicates the employee is not expected to have any time or absences reported and the employee will not be processed by the Absence Calculation process or receive any absence accruals until they return from leave
 - **Return from Leave:** This Job Data action returns an employee from either a “Paid Leave of Absence” or “Leave of Absence-Unpaid” status. Leave accruals, if previously stopped, resume upon the first full period after the employee returns to work
- **Holiday Schedule:** Employees may be moved to the HOLSTD holiday schedule with no holidays while on leave with pay. This allows extended absence types to be entered and processed on holiday pay
- **Paygroup:** Employees may be moved to a special no pay paygroup while on leave



Entering and Approving Extended Leave

- Extended leave absence events do not automatically display as “Approved” and do not route for approval via workflow or generate a worklist item
- Cardinal recommends a second Absence Management Administrator approves the absence
 - The Absence Management Administrator that enters the event will need to notify the second Absence Management Administrator at your Agency to approve the request
 - In cases where there is only one Absence Management Administrator within the Agency, the same Absence Management Administrator that enters the absence event is also able to approve it



Checking Absence Tracking Accumulators

Cardinal uses accumulators to track the hours or days of absence usage (accumulated time) based on pre-defined business rules. Before entering an extended absence request, you may want to review the accumulator values for the extended leave type(s) you plan to enter.

The accumulators used for the various extended absence types include:

- **FML** (Family and Medical Leave): Three tracking accumulators are used to track FML hours used
 - The “**FML ENT ELEM TAKE**” accumulator tracks FML used in the leave year, regardless of absence reason (includes Employee, Family, and Military FML)
 - The “**FML EMP/FAM BAL**” accumulator tracks FML used in the leave year with an absence reason of “Employee” or “Family”
 - The “**FML MILITARY BAL**” accumulator tracks FML used in the leave year with an absence reason of “Military”. Some military leave accumulators track based on the federal fiscal year (10/1 – 9/30)
- **STD** (Short Term Disability): The “**STD TAKE BAL DAYS**” accumulator tracks the total STD taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Short Term Disability period
- **LTD** (Long Term Disability): Similar to STD, the “**LTD TAKE BAL DAYS**” accumulator tracks the total LTD taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Long Term Disability period
- **WCL/WCP** (VSDP Workers’ Compensation Pay/Workers’ Compensation): The “**WCL TAKE BAL DAYS**” accumulator tracks the total WCL or WCP taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Workers’ Compensation period



Extended Absences – Family and Medical Leave (FML)

In order for the employee to take FML in Cardinal, the Absence Management Administrator must enter a balance adjustment to grant the employee hours.

Note: It is critical to always enter an Absence Reason for all leave. For example, for an FML event, selection of FML Employee, FML Family, or FML Military will ensure proper accumulator tracking.

FML is available for selection on the Timesheet but is typically only entered on the Timesheet if the leave is intermittent rather than consecutive. If the FML is to be entered by the employee/timekeeper/manager on the Timesheet, the Absence Management Administrator will still need to grant the appropriate FML hours as a balance adjustment.

For further information about extended absences, see the Job Aid titled **TA374_Extended Leave Processing Reference Guide**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Extended Absences – Short Term Disability (STD)

Only the Absence Management Administrator can enter STD on the **Absence Event** page. STD can be entered on the same date as other leave types to report scheduled hours that are not worked or covered by STD. If two types cannot be used concurrently, per policy, then Cardinal displays an error message.

Follow the Commonwealth and agency policies regarding specifics about what to enter regarding Short Term Disability time on the **Absence Event** page. For more information about Short Term Disability, see the Job Aid titled **TA374 Extended Leave Processing**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

New Window | Help | Personalize Page

Absence Event Entry | Forecast Messages

Employee ID Empl Record 0 Name
From 11/16/2024 Through 05/15/2025

Absence Events

Absence Take | Process Status | Forecast Value | Filter

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source
<input type="text" value="STD TAKE ELEM"/> <input type="button" value="Search"/>	VSDP Short Term Disability	02/03/2025 <input type="text"/>	02/07/2025 <input type="text"/>	6.40	Normal <input type="button" value="v"/>	<input type="checkbox"/>	02/03/2025 <input type="text"/>	Details	Administrator Absence Event
<input type="text" value="VAC TAKE ELEM"/> <input type="button" value="Search"/>	Vacation	02/03/2025 <input type="text"/>	02/07/2025 <input type="text"/>	1.60	Normal <input type="button" value="v"/>	<input type="checkbox"/>	02/03/2025 <input type="text"/>	Details	Administrator Absence Event

Absence Event Entry | Forecast Messages



Extended Absences

Long Term Disability (LTD)

Only the Absence Management Administrator can enter LTD on the **Absence Event** page. This benefit lasts until the employee can go back to work or for the number of years stated in the policy.

Workers' Compensation

Workers' compensation is a form of insurance providing wage replacement and medical benefits to employees injured in the course of employment. Only the Absence Management Administrator can enter WCL/WCP/WCS on the **Absence Event** page.

Processing Workers' Compensation:

- Absence Management Administrators enter WCL/WCP/WCS on the **Absence Event** page
- Use STL (STD - Pay Dock) to report unpaid
- Use the **Comments** field on the **Absence Event Comments** page to record the claim number of the absence event
- Only one Workers' Compensation Leave event can be entered per day
- Use the **Comments** field to indicate the number of hours charged to each claim when a single Workers' Compensation Leave event is entered and hours need to be charged to multiple claim numbers

For further information about extended leave, see the Job Aid titled **TA374_Extended Leave Processing**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Lesson Summary

3

Managing Extended Leave

In this lesson, you learned:

- How to Manage Extended Leave
- Entering and Approving Extended Leave Overview



Lesson

4

Adjusting Absence Entitlement Balances

This lesson covers:

- Adjusting Absence Entitlement Balances Overview
- Manual Adjustment of Entitlement Balances
- Processing Leave Donations
- Zeroing Out Leave Balances
- Identifying Balances for Leave Payout
- Transferring from an External Leave System to Cardinal
- Pay Docking Overview



Adjusting Absence Entitlement Balances Overview

There are times Absence Administrators may need to take action or communicate information related to absence balances for various reasons.

Scenarios that may require action:

- Manually entering/adjusting entitlement balances (e.g., correcting errors, correcting converted or transfer balances)
- Processing leave donations
- Zeroing out absence balances
- Identifying balances for leave pay out
- Identifying pay docking

Absence Management Administrators have access to enter various leave adjustment TRCs, (e.g., CPO (Comp Time Leave Payout), OCA (Overtime Leave Adjust)).



Balance Adjustments

Where and When to Make Adjustments

The following three pages are used to adjust an employee's absence/leave balances:

- **Timesheet** page: Is only used to adjust or remove compensatory and overtime leave balances for terminated employees or employees that are no longer eligible (e.g., from non-exempt to exempt)
- **Supporting Elements** page: This is only used for transferring employees in order to grant vacation and sick balances carried forward from the transferring agency
- **Absences** page: This is used for all other scenarios not covered by the previous pages listed

Note: Balance adjustments entered directly into Cardinal on the **Absences** page are not displayed on the employee's Timesheet until the Calendar ID is finalized at the end of the pay period. However, once the balance adjustment is entered, the balance is available to the employee for absence entry. Balance adjustments should be made before the absence is entered or interfaced.



When Entitlement Balances are Processed

Understanding when entitlements are processed will help you determine the appropriate period to apply an adjustment. Balances for terminated employees, or other situations where an employee is no longer eligible, should always be zeroed out in the period that contains the employee's last day of work.

Processed at the beginning of the pay period:

- VSDP Personal Leave (PER)
- VSDP Sick Leave (SDP)
- Annual Leave Incentive (ALI)

Processed at the end of the pay period:

- Vacation (VAC)
- Traditional sick (SCK)



Manual Adjustment of Absence Entitlement Balances

Not all absence types are granted based on an annual entitlement or accrual during the leave year.

Absence types that require manual set up include:

- **ELP** (Educational Leave)
- **ALI** (Annual Leave Incentive)
- **MIL** (Military Leave)
- **ERL** (Employee Recognition Program)

Key points about Absence Entitlement Balances:

- Balances are adjusted when there is an exception
- Investigate to verify the exception before adjusting the balance
- Absences that are future dated are updated when the calendar is processed
- VAC or SCK leave adjustments are made in the pay period prior to when the employee will be able to take the leave
- Large volumes of absence balance adjustments can be uploaded using the absence balance adjustment mass upload process

For further information about the mass upload process, see the Job Aid titled **Performing a Mass Upload**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information about manual adjustments, see the Job Aid titled **TA374_Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Processing Leave Donations

The leave donation process does not allow employees to enter a donation leave request directly. Employees who wish to donate leave to another employee should contact their supervisor for guidance regarding agency policy.

Once the donation has been confirmed, Absence Management Administrators:

- Enter and manage DLR (Donated Leave) by entering balance adjustments for the recipient and donor
 - Donor and recipient balances update when the regular Absence Calculation process runs (scheduled daily)
 - The donor's vacation balance will be reduced by the donated amount and the recipient's DLR balance will be increased by the donated amount
 - The recipient can use the DLR hours after the Absence Calculation process has run, even though time is not visible to them on their Timesheet
 - The balance adjustments are not visible to the employee on their Timesheet until the pay period has been finalized
 - Use reports or online pages to verify adjustments are accurate
- Multiple adjustment rows for the same absence types cannot be added for the same Calendar ID period
 - If multiple employees are donating leave to the same recipient, add one adjustment row (DLR REC ELEM) with the total number of donated hours for the calendar period. Use the **Comments** field to capture details
- Return unused donated leave to the donor(s) after the recipient no longer needs or qualifies by entering balance adjustments for the recipient and donors
 - **Donated Leave Usage Report Query (V_TA_DONATED_LEAVE)** can be used to identify unused leave that should be returned

For further information about processing leave donations, see the Job Aid titled **TA374_Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



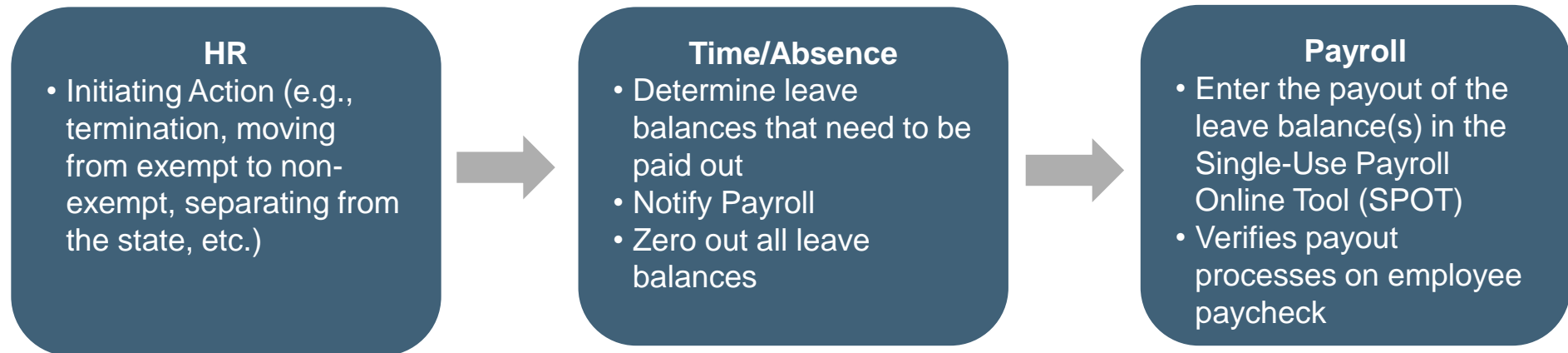
Identifying Balances for Leave Payout

Sometimes, an employee is no longer eligible for leave (e.g., separating from the state, retiring, moving from a Salaried Position to an Hourly Position, moving from Non-Exempt to Exempt) and may be eligible for a payout of some or all of the leave balances. When this occurs, there must be coordination between multiple Cardinal functional areas for the leave to be paid out accurately.

Examples of scenarios that may result in leave payout:

- Separating from the state
- Retiring
- Moving from a Salaried Position to an Hourly Position
- Moving from Non-Exempt to Exempt.

The flow below provides a high-level overview of the process:



Note: Follow Commonwealth and agency policy regarding when leave is eligible for payout and how to calculate the amount to be paid.



Zeroing Leave Balances

When an employee is no longer eligible, the balances in Cardinal should be zeroed out whether they were eligible for payout or not.

All leave, including compensatory and overtime, needs to be zeroed out.

- If balances are not zeroed out, and the employee is rehired by the agency, those balances will remain in Cardinal and be eligible for the employee to use.
- Balances not zeroed out will be listed on the annual leave liability report.

Examples of scenarios that may require leave to be zeroed out:

- Moved from non-exempt to exempt
- Leaves the state

Note: All leave types, except for compensatory and overtime leave, are zeroed out on the **Absences** page. Compensatory and overtime leave balances are zeroed out on the employee's Timesheet.

For further information about zeroing leave balances, see the Job Aid titled **TA374_Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Transferring From an External Leave System of Record to Cardinal

If their previous Agency was using an external absence system of record and the current Agency is using Cardinal AM, their balances need to be manually entered.

Absent Management Administrators make these adjustments on the **Supporting Elements** page.

Transferring employees can use balances from their previous Agency in their first pay period.

For details on entering balances, see the Job Aid titled **TA374_Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Pay Docking Overview

Pay Docking (LNP) is the reduction of an employee's wages/salary when unpaid time has been taken off. It can system generated, interfaced from agency source system or entered directly by the employee, Timekeeper, Supervisor, and Time & Labor /Absence Management Administrator. While Pay Docking is entered in Time & Attendance it does not load to the employee's paysheet.

Payroll Administrators are responsible for calculating and then manually entering Pay Docking transactions into SPOT to reduce the employee's wages/salary when applicable.

It is important for Payroll Administrators, AM Administrators, TL Administrators, supervisors and employees to work together when reviewing any potential Pay Docking scenarios, to avoid unexpected Pay Docking.

There are two key reports that should be run to help determine when pay should be docked.

- **Ineligible Forecasted Absence Events Report:** list of all employees that may go into a pay docking situation
Note: This report is only applicable for agencies using Cardinal Absence Management
- **Docking Unpaid Absences Report:** list of all employees with LNP on the timesheet

For more details and scenarios about Pay Docking, see the **Job Aid** titled **Pay Docking in Cardinal Overview** located on the Cardinal Website in **Job Aids** under **Training**.





Ineligible Forecasted Absence Events Report

The **Ineligible Forecasted Absence Events Query** displays the absence name and reason, begin and end dates, entry source, workflow status, manager approval status, and hours by employee, department, and business unit. This query can be used to search for individual employees who are forecasted to have absence events that are not eligible and/or approved.

Navigate to this report using the following path:

NavBar > Menu > Reporting Tools > Query > Query Viewer > V_TA_ABS_EVT_FCST_INELIG

V_TA_ABS_EVT_FCST_INELIG - Ineligible Forecasted Absence

Business Unit50100

Department ID (Blank for All)10025

Current Leave Yr End Date12/31/2019

View Results

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

View All

Row	Dept ID	Department	Business Unit	Empl ID	Empl Record	Position	Employee Name	Leave Type	Absence Name	Absence Reason	Begin Date	End Date	Entry Source	Workflow Status	Manager Approved	Begin Day Hours	End Day Hours	All Days Indicator	Absence Duration	Process Date	Forecast Value	Forecast Date Time	Date Submitted
1	10025	Safety & Performance Division	50100		0	03652		VAC TAKE ELEM	Vacation	VAC	07/12/2012	07/26/2012	1	A	Y	1.60	0.00	Y	0.00	01/10/2013	INELIGIBLE	06/25/2015 8:33:12AM	
2	10025	Safety & Performance Division	50100		0	03652		VAC TAKE ELEM	Vacation	VAC	07/01/2013	07/03/2013	1	A	Y	0.00	0.00	N	0.00	09/13/2013	INELIGIBLE	06/25/2015 8:33:12AM	
3	10025	Safety & Performance Division	50100		0	03652		VAC TAKE ELEM	Vacation	VAC	07/05/2013	07/05/2013	1	A	Y	4.00	0.00	N	0.00	09/13/2013	INELIGIBLE	06/25/2015 8:33:12AM	

First 1-3 of 3 Last



Docking Unpaid Absences Report

The Docking Unpaid Absences Report displays a list of employees with processed unpaid absences and can be used to review transactions and identify hours that require Pay Docking for salaried employees in Cardinal. Unpaid absences can either be from Absence Management (for example, **LNP – Pay Docking**) or from Payable Time (for example, **HNP - Holiday Pay Docking**) where Cardinal is the leave system of record or from Payable Time (for example, **LNPX - Pay Docking** or **STLX - Short Term Disability-Pay Dock**) where the Agency has an external leave system of record.

Navigate to this report using the following path:

NavBar > Menu > Time and Labor > Reports > Docking Unpaid Absences Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Docking Unpaid Absences																		
2																			
3	Run Control Parameters:																		
4	Business Unit:																		
5	Department:																		
6	Emplid:																		
7	Calendar Group:																		
8																			
9	Name	Emplid	EMPL_RC	POS_NU	BUSINESS_UNI	DEPTID	PAYGROUP	PAY BEGIN DT	PAY END DT	DUR	TAC	DESCRIPTION	QUANTIT	STATUS	FROZEN DATE	FROZEN FLAG	FORECAST VALUE	WORKGROUP	
10																			

This report should be run twice (at a minimum), to identify potential pay docking for each pay period.

<u>Before HR Data Freeze</u>	<u>Day after Payday</u>
<ol style="list-style-type: none">1. Run report with current Calendar Group ID/Period Begin and End dates2. Save the report to use as a comparison after the Payday3. Review for Pay Docking4. Payroll Administrator verifies with the TL/AM Administrator5. Enter SPOT transaction(s)	<ol style="list-style-type: none">1. Run report again with the same Calendar Group ID/Period Begin and End dates2. Save the report3. Compare the results of the report run Before HR Data Freeze the report run after the Payday4. Identify any additional pay docking or if any funds are owed to the employee5. Payroll Administrator verifies with the TL/AM Administrator6. Enter SPOT transaction(s)



Lesson Summary

4

Adjusting Absence Entitlement Balances

In this lesson, you learned:

- An overview of Adjusting Absence Entitlement Balances
- An overview of Manual Adjustment of Entitlement Balances
- How to Process Leave Donations
- How to Zero Out Leave Balances
- How to Identify Balances for Leave Payout
- An overview of Transferring from an External Leave System to Cardinal
- An overview of Pay Docking



Lesson

5

Absence Calculation Processing

This lesson covers:

- An Overview of Absence Calculation processing
- Troubleshooting Issues Related to Absences/Leave



Overview of the Absence Calculation Process

Calculate Absence is a daily batch process that calculates all absence entitlements (automatic and granted) and absence takes.

The Calculate Absence process includes:

- **Absence Entitlements:** This process updates frequency-based entitlements and makes entitlements available to the respective employees
- **Absence Takes:** During this process, Cardinal calculates the number of hours per day for each take and deducts the hours taken from the respective employee's balances
- **Retroactive Changes:** This process updates all intervening time periods up to the present period when you add, update, or delete an absence event or make changes to job data or a work schedule that affects a period that has already been processed

The Cardinal Post Production Support Team and the State Payroll Operations (SPO) office personnel have access to run this process manually as needed.



Absence Calculation Process

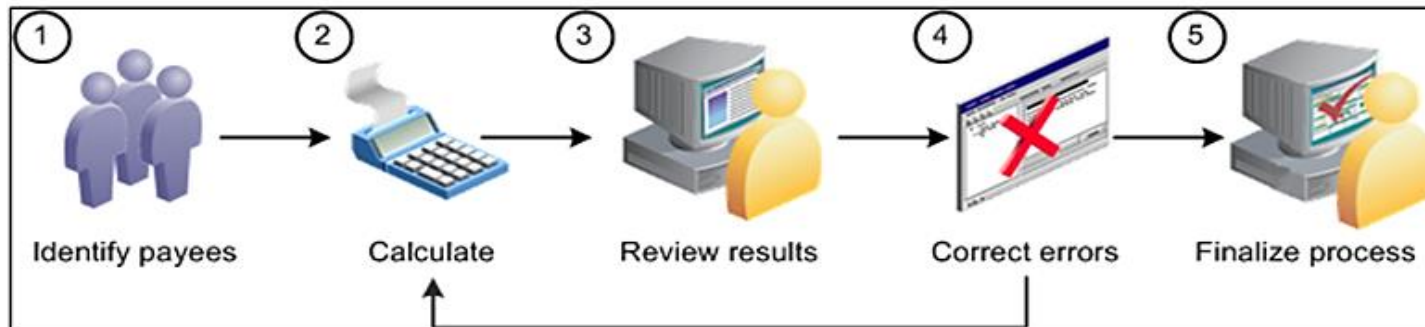
The Absence Calculation process:

- Selects employees to be processed –includes active employees and employees with pending retroactive changes
- Processes approved absence requests – identifies and processes approved absence requests
- Updates leave balances
- Updates the year-to-date (YTD) accumulators
- Calculates periodic accruals based on applicable leave policies and takes into account job attributes such as length of service and full/part time status

Absence Calculation must be finalized before it can be sent to Time and Labor and payroll processing.

Once absence results have been finalized, any subsequent changes are retroactive transactions and are processed during the subsequent calendar periods.

After the absence calendar is finalized and closed, the next calendar will open for the current period.





Troubleshooting Issues Related to Absences/Leave

The following are three key resources that you can use to assist with researching and troubleshooting employee absences:

- Employee Leave Report
- Absence Accumulators Result Query
- Results by Calendar and Calendar Group

For further information about each of these reports, see the **Cardinal HCM Time & Attendance Reports Catalog**. It is located on the Cardinal website under **Resources**.

For further information about Calendar Group reporting, see the Job Aid titled **TA374_Results by Calendar-Calendar Group**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Results by Calendar/Calendar Group

The **Results by Calendar/Calendar Group** pages can assist Absence Management Administrators review detailed absence information processed by the Absence Calculation process and help to troubleshoot issues. For example, if balance adjustments or retroactive transactions were made for an employee, you can access previous calendars and recalculated versions of the calendars to ensure they were processed correctly. Both options show the same information, but it displays in different ways.

The **Results by Calendar** page displays absence data based on the semi-monthly leave period it was effective in. The calendar selected will display the most recent version of the data effective in that calendar period along with any other versions of the same calendar period that may have been re-processed during a different calendar period due to retroactivity.

The **Results by Calendar Group** page displays absence data based on the semi-monthly leave period it was processed in. The calendar group selected will display the corresponding calendar period along with any prior calendars that were re-processed during that period due to retroactivity.



Results by Calendar

An example of result of by calendar with no retroactive adjustments.

Navigate to this report using the following path:

NavBar > Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar

Calendar ResultsEarnings and DeductionsAccumulatorsSupporting Elements

Employee

Empl ID

Empl Record 0

Calendar ID SM12019SM124

Pay Group SM1

Semi-monthly Classified

Segment Information by Calendar Group

1-1 of 1

View All

Calendar Group ID	Segment Begin Date	Segment End Date	Calculate Action	Segment Number	Version Number	Revision Number	Segment Detail
2019SM124	12/25/2019	01/09/2020	Calculate	1	1	1	Segment Detail

Additional Result Pages

[Positive Input - Absence Absence Data](#)[Positive Input - Payroll Retro Calculation Deltas](#)[Generated Positive Input](#)

Return to Search

Previous in List

Next in List

Notify

Calendar Results | [Earnings and Deductions](#) | [Accumulators](#) | [Supporting Elements](#)



Results by Calendar Group

Results by Calendar Group shows the most recent Absence Calculation process run and any Calendar IDs with retroactive changes that were processed in the Calendar Group ID.

Navigate to this report using the following path using the Calendar Group ID 2019SM124:

NavBar > Menu > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar Group

Calendar Group ResultsEarnings and DeductionsAccumulatorsSupporting Elements

Employee

Empl ID

Empl Record

Calendar Group ID

2019SM124

SM1CalGroup242019

Segment Information by Calendar

1-3 of 3

View All

Calendar ID	Segment Begin Date	Segment End Date	Calculate Action	Segment Number	Version Number	Revision Number	Segment Detail
SM12019SM122	11/25/2019	12/09/2019	Calculate	1	3	1	Segment Detail
SM12019SM123	12/10/2019	12/24/2019	Calculate	1	2	1	Segment Detail
SM12019SM124	12/25/2019	01/09/2020	Calculate	1	1	1	Segment Detail

Additional Result Pages

[Positive Input - Absence Absence Data](#)

[Positive Input - Payroll Retro Calculation Deltas](#)

[Generated Positive Input](#)

Return to Search

Previous in List

Next in List

Notify

Calendar Group Results | [Earnings and Deductions](#) | [Accumulators](#) | [Supporting Elements](#)



Lesson Summary

5

Absence Calculation Processing

In this lesson, you learned:

- About the Absence Calculation process
- How to troubleshoot Issues Related to Absences/Leave



Course Summary

TA374

Absence Management Maintenance

In this course, you learned:

- An overview of Absence Management processing
- How to Review Absence and Leave Balances
- How to Enter and Modify Absence Events
- How to Manage Extended Leave in Cardinal
- How to Adjust Absence Entitlement Balances
- The Calculate Absence and Payroll Processing Processes





Appendix

- Roles and Responsibilities
- Flowcharts
- Flowchart Key



TA Roles and Responsibilities

Responsibilities  Roles 	Employee TL Setup	Employee	Timekeeper	TL Admin	Absence Admin	TL and Absence Supervisor	TA Interface Admin
Enter/Modify own Timesheet (including Time and Leave/Absences)		✓					
Enter/Modify Timesheets on behalf of Employees (including Time and Leave/Absences)			✓	✓	✓	✓ (Direct Reports)	
Cancel Leave/Absences		✓ (if not Approved)	✓	✓	✓	✓ (Direct Reports)	
Review/Resolve Timesheet Exceptions (Warnings)		✓	✓	✓	✓	✓ (Direct Reports)	
Allow Timesheet Exceptions (Warnings)				✓	✓	✓ (Direct Reports)	
Review and Correct Time Entry Upload and Absence Entry Upload Transactions				✓ (on Timesheet)	✓ (on Timesheet)		✓ (on Upload Review Page)
Enter/Modify Time Reporter Data, Comp Plans, TL Eligibility, and TL Auto Enroll Bypass	✓			✓ View Only for Elig and TL Auto Enroll			



TA Roles and Responsibilities (continued)

Responsibilities	Roles	Employee TL Setup	Employee	Timekeeper	TL Admin	Absence Admin	TL and Absence Supervisor	TA Interface Admin
Enter/Modify Leave Donations and Extended Leave Absences						✓		
Administer Absence Events and Review Absence Calculation Results						✓		
Enter/Modify Absence Balance Adjustments						✓		
Assign Employee Work Schedules	✓			View Only	✓	View Only	✓ (Direct Reports)	
Approve Time and Absences							✓ (Direct Reports)	
Run TA Reports/Queries	✓			✓	✓	✓	✓	✓



Delegation Administrator Role

This role has access to:

- Delegation allows managers/supervisors to authorize another user to serve as their proxy for managing employee's time and absences. When a manager delegates to a proxy, all workflow notifications and items will be routed to the proxy. This is especially helpful when a manager plans to be out of the office for a period of time.
- Add and manage Time & Attendance delegation requests on behalf of others
- Delegation Administrators are able to create, modify, and revoke delegation requests on behalf of the managers. This allows the delegation functionality to be utilized in the case of a manager's unplanned absence.
- Managers and/or proxies will receive workflow email notifications when delegation requests are created or modified by the Delegation Administrator.
- As TL Administrator, there may be times that you will need to work with the Delegation Administrator to delegate approvals to a proxy if the Reports To is out of the office when you are ensuring time is ready for the Time and Labor load process.
- Run TA reports and queries

Note: Delegation cannot be used for a vacant position or when a supervisor is on Leave of Absence (paid leave, unpaid leave, LOA Working). In these scenarios, Cardinal will route approvals to the supervisor's Reports To supervisor. In the event the supervisor's Reports To is on LOA or the position is vacant, approvals will roll up to the supervisor's Reports To supervisor.

Training Material:

- INTRO102_Overview of Cardinal Human Capital Management (HCM) (WBT)
- NAV205_Navigation in Cardinal HCM (WBT)
- TA372_Delegation Administration (Job Aid)
- Cardinal HCM Time and Attendance Reports Catalog

Training materials are located on the Cardinal website:

<https://cardinalproject.virginia.gov/>



TA Special Restricted Approver Role

TA Special Restricted Approver	Training Materials
<p>This role has access to:</p> <ul style="list-style-type: none">• Approve/change pending timesheet transactions that could not be routed to an actual approver due to various reasons (e.g., Reports To issues, user profile issues)• Approve/deny/change pending absence events that could not be routed to an actual approver <p>Other Role Considerations:</p> <ul style="list-style-type: none">• This role may only be assigned to a maximum of three users at each agency and must be assigned to at least one user at each agency• User with this role should have the Absence Supervisor role or the Time & Labor Supervisor role	<ul style="list-style-type: none">• NAV205_Navigation in Cardinal HCM (WBT)• ESS392A/B_Employee Self-Service for Time & Attendance (WBT)• TA373_Time & Attendance for Managers and Supervisors (WBT)• TA373:_Approving Time and Absences (Job Aid)• Approving Time using the Approvals Tile (Video)• Approving Absences from the Employee's Timesheet (Video)• Approving Absences using the Approvals Tile (Video)• Adjusting an Approved Absence (Video) <p>Training materials are located on the Cardinal website. https://cardinalproject.virginia.gov/</p>



TA Special Restricted Approver Role (continued)

The TA Special Restricted Approver role does not give the user access to approve time for all employees in their agency. The TA Restricted Special Approver role will only come into play in the very rare scenarios when an employee's time and/or absences are not routing to a TA/AM supervisor. It is only on these occasions that the time will route to those with this role and it will appear on their **Approvals** tile.

Reasons that this may happen include:

- The employee does not have a user profile
- The employee's approver does not have a user profile
- The employee "Reports To" a position that is vacant, and that vacant position either does not have a "Reports To" position assigned or is also vacant

We encourage the TA Restricted Special Approver to work with your agency TL Administrators, AM Administrators, HR Administrators and TA Supervisors to resolve issues causing pending timesheet transactions that could not be routed to an actual approver. Together you should determine what the best resolution might be to prevent the issues.

Possible resolutions might include:

- If the "Reports To" and/or user profile issue is addressed, the employee could make changes to the already submitted time on the timesheet and resubmit to route the time to the actual supervisor
- The Delegation Administrator could delegate the time to another supervisor for approval once the time has been reviewed/validated by the actual supervisor
- The TA Restricted Special Approver could approve the time once the time has been reviewed/validated by the actual supervisor

Note: the TA Restricted Special Approver would only see items for approval on their **Approvals** tile in the rare scenarios mentioned above when it is not routing to a TA/AM supervisor.



TA Expired Grace Approver (V_TA_EXPIRED_GRACE_APPROVER)

The TA Expired Grace Approver (V_TA_EXPIRED_GRACE_APPROVER) role, allows select agency users to manage time that falls outside of normal submission and approval grace periods. This role grants access to two pages in Cardinal, the Update Time Status page and the Request Batch Approval Process page. These pages allow users with this role to perform the following actions for any employee in their accessible agencies:

TA Expired Grace Approver Role Capabilities	
Employees in Online Workgroups	
Action	Role Permissions
Approve Payable Time in Needs Approval (NA) status outside of grace period	Between 90 and 365 days old
Close or Delete Reported Time in Saved (SV) or Needs Approval (NA) status	More than 90 days old
Close Payable Time in Needs Approval (NA) status	More than 90 days old
Delete Invalid Reported Time	After termination date
Employees in Interfacing Workgroups	
Action	Role Permissions
Close or Delete Reported Time in Saved (SV) or Needs Approval (NA) status	More than 90 days old
Delete Invalid Reported Time	After termination date



TA Expired Grace Approver (continued)

TA Expired Grace Approver Role Guidelines

Every Cardinal HCM payroll agency **must have at least one** designated TA Expired Grace Approver.

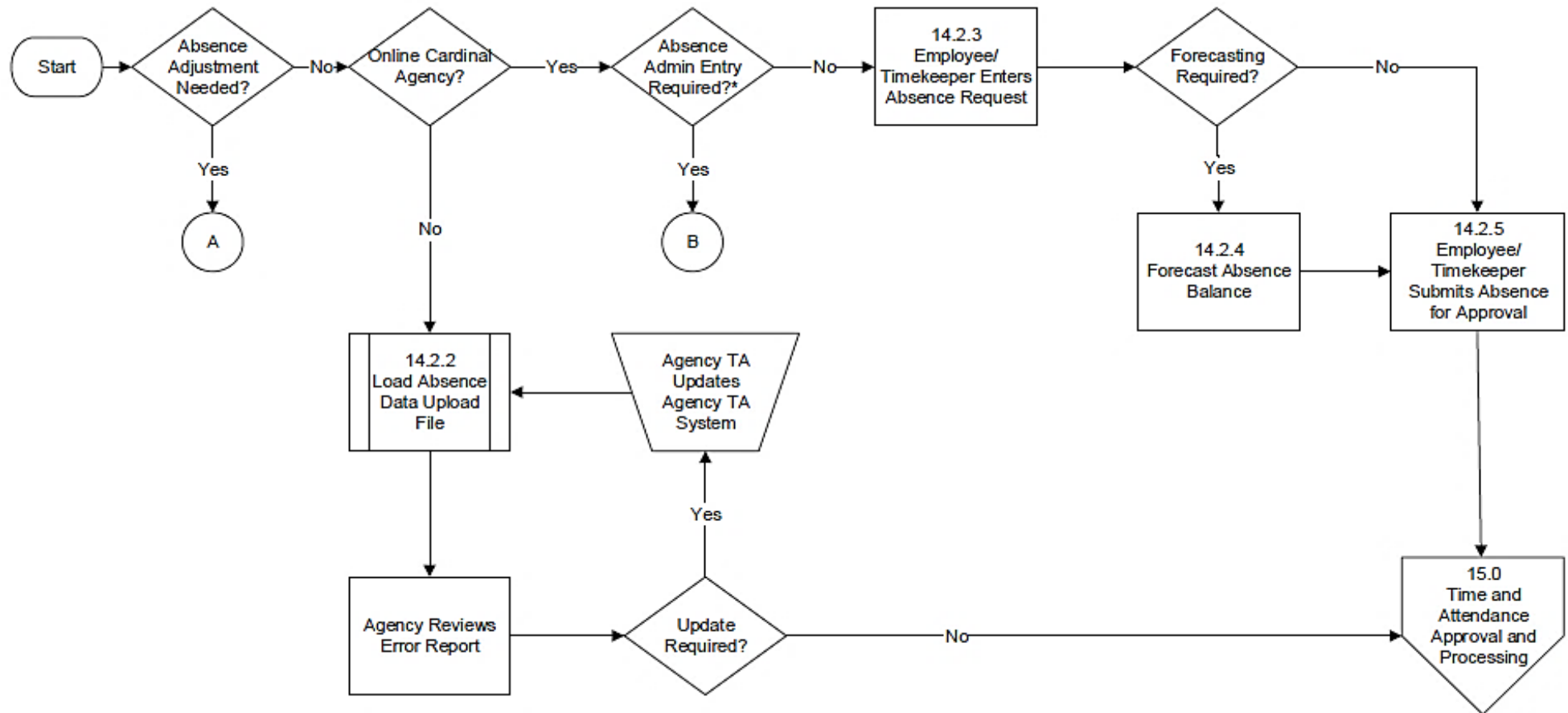
- It is recommended that this role be assigned to a Fiscal Officer or designee who understands the impact on pay and distribution of approving, closing, and deleting old time transactions.
- This role may only be assigned to a **maximum** of three users at each agency.
- Agencies should develop a process for supervisors and administrators to request approval, closure, and deletion of time older than 90 days with appropriate justification and authorization and deletion of time after termination dates; requests received by Cardinal Post Production Support will be redirected to the agency TA Expired Grace Approver(s).

See the Job Aid titled **TA_Time Status Administration** for guidance. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.



Process: TA Capture

Sub-process: Manage Absence Reporting



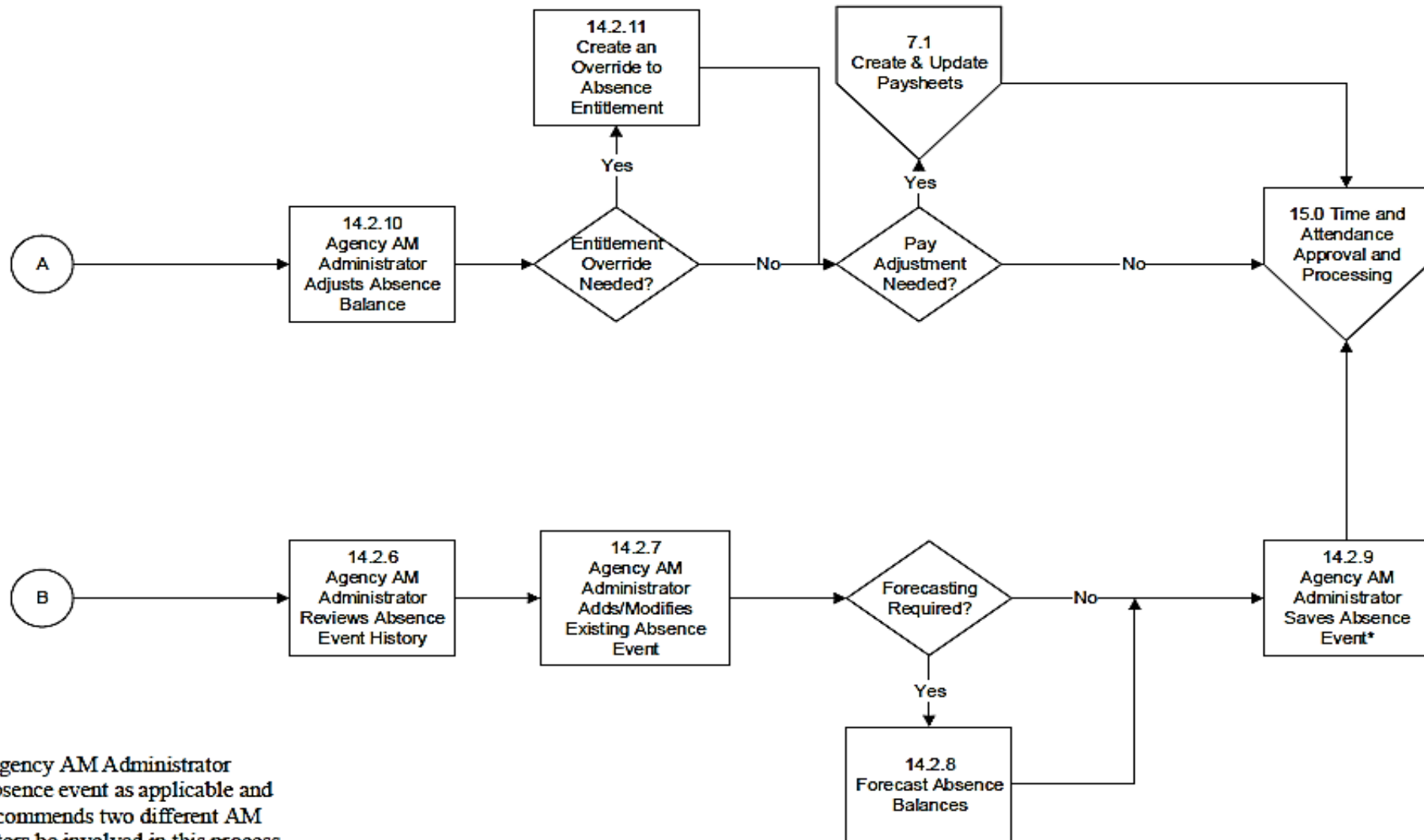
*Absence types that require eligibility verification or where a balance adjustment is needed, such as:

- Short Term Disability (STD)
- Long Term Disability (LTD)
- Workers' Compensation (WCP)



Process: TA Capture

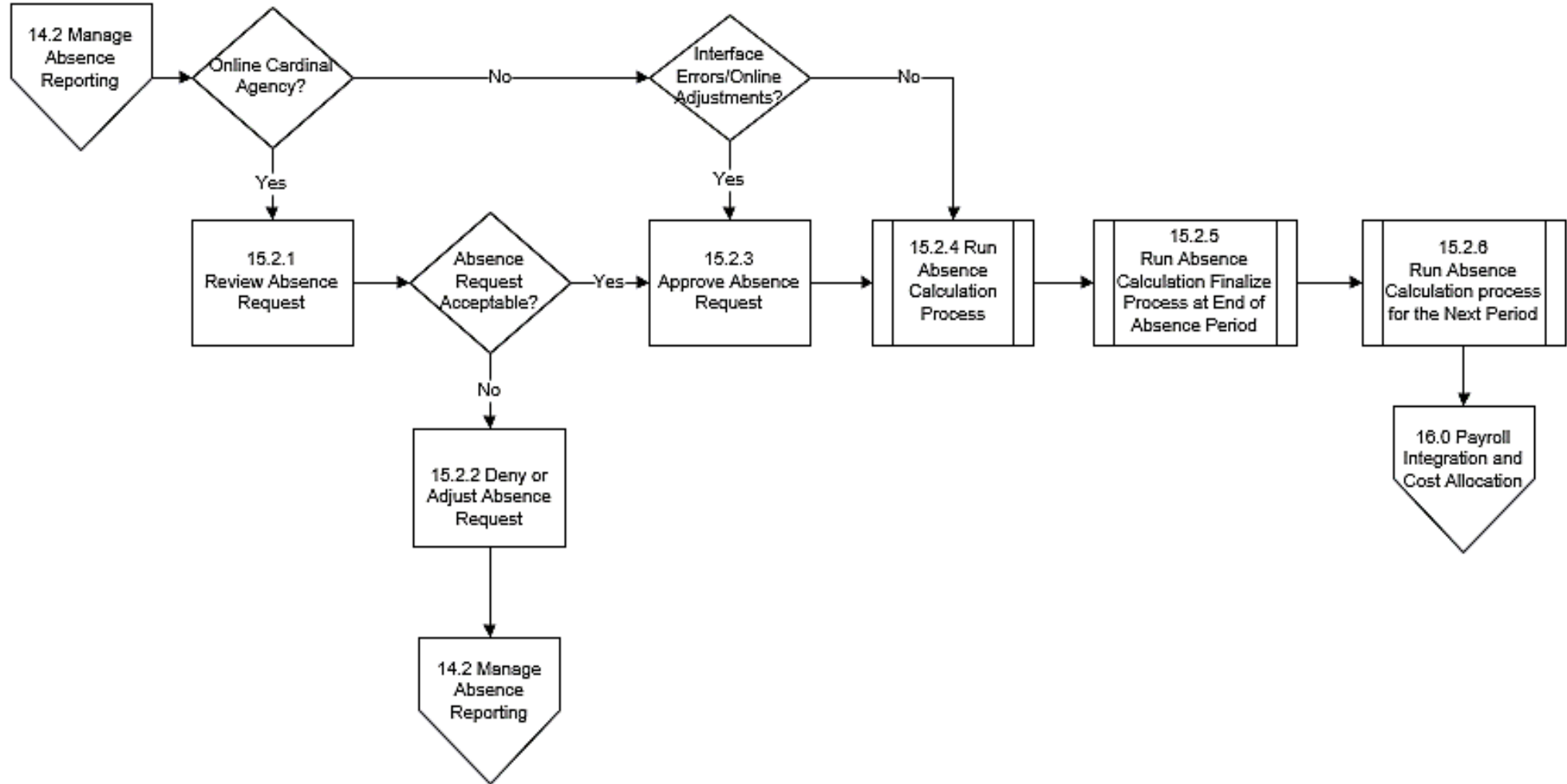
Sub-process: Manage Absence Reporting (continued)



* Second Agency AM Administrator approves absence event as applicable and Cardinal recommends two different AM Administrators be involved in this process



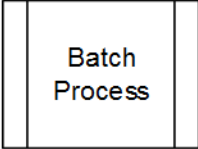
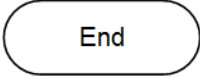
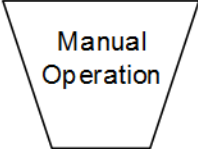
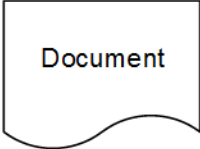
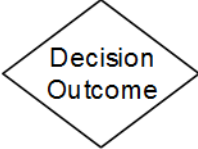
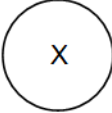
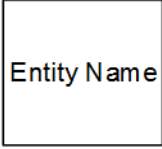
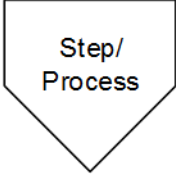


Administer Absence Processing





Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.