ESS Reviewing Absence and Leave Balances

This Job Aid provides Employee Self-Service (ESS) users information on how to review Absence and Leave Balances. It starts with the overview of the **Comprehensive Absence Summary** page and then a review of the **Leave Balances** page and the **Absence Balances** page for more detailed information. If you need additional information related to your leave and absence balances, please see your supervisor, an Absence Management Administrator, or a Time & Labor Administrator.

Reminder: In Cardinal, the terms "Absence" and "Leave" are not synonymous. The following guidelines apply:

Leave Types: The term "Leave" in Cardinal refers specifically to Compensatory and Overtime Leave only.

Absence Types: The term "Absence" in Cardinal refers to Absence Types such as Vacation, VSDP Sick Leave, etc.

Note: Balances for Absence Types do not include unprocessed hours such as hours in a "Saved" status or unapproved absence hours in a "Needs Approval" status.

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Revision History

Revision Date	Summary of Changes
1/27/2025	Baseline

Overview of the Comprehensive Absence Summary Page

The **Comprehensive Absence Summary** page provides a consolidated overview of all leave and absence balances and accruals. This page defaults the current balances for Absence Types as of the last finalized leave period or select the **Estimated As of** radio button to review the estimated hours for the current open leave period end date. It includes:

- Current vacation accrual rate
- Vacation Maximum Carryover
- Compensatory Leave Balance Limit
- Overtime Leave Balance Limit
- Year-to-date hours (earned and taken)
- Details for Leave and Absence Types that expire, including expiration dates for hours that will expire if not taken.

Step	Action
1.	Navigate to the **Comprehensive Absence Summary** page using the following path: **Time Tile > Timesheet page > Comprehensive Absence Summary**
	The **Timesheet** page displays by default.
2.	Click the **Comprehensive Absence Summary** link from the menu list.

Step	Action
	The **View Comprehensive Absence Summary** page displays.

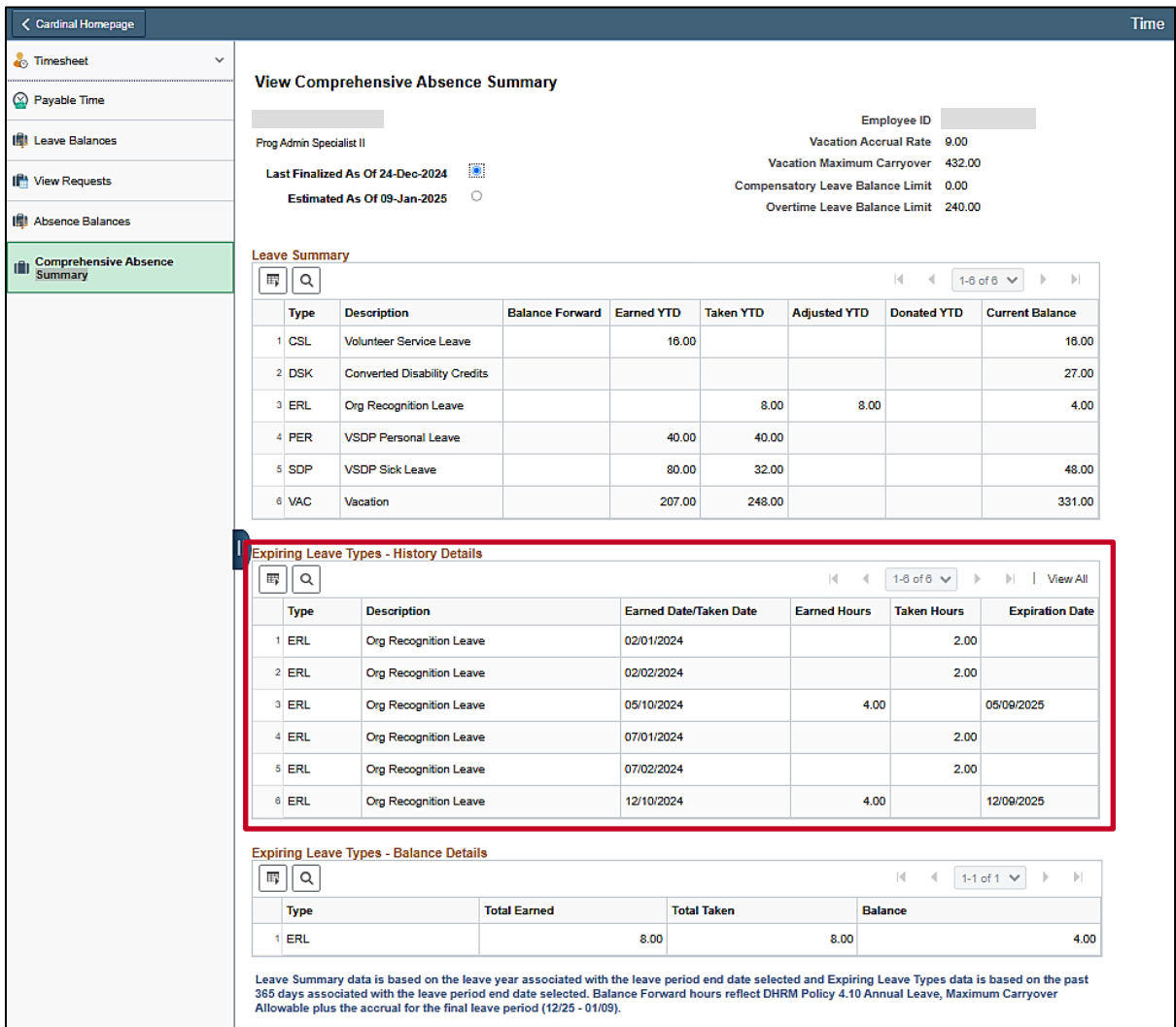|	Click the **Estimated As of** radio button to review the estimated hours for the current open leave period end date.
	The **Vacation Accrual Rate** field displays the number of vacation hours accrued for each pay period.

Step	Action
ℹ️	The **Leave Type** and **Description** fields display the name of the Leave or Absence Type. The **Current Balance** field for Absence Types are based on the last finalized leave period associated with the last pay date or the estimated as of hours for the current open leave period end date. This value does not include hours in a saved status, not approved by the supervisor, or not yet finalized in the system. An example of hours not yet finalized are hours earned or taken in a prior leave period but entered in the current open leave period.
ℹ️	The **Expiring Leave Types – History Details** section contains the history related to when certain Leave or Absence Types were earned or taken.
3.	Click the **View All** link to see the complete list if necessary.

Step	Action
	The complete list displays.

Expiring Leave Types - History Details

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	Type	Description	Earned Date/Taken Date	Earned Hours	Taken Hours	Expiration Date
1	ERL	Org Recognition Leave	02/01/2024		2.00	
2	ERL	Org Recognition Leave	02/02/2024		2.00	
3	ERL	Org Recognition Leave	05/10/2024	4.00		05/09/2025
4	ERL	Org Recognition Leave	07/01/2024		2.00	
5	ERL	Org Recognition Leave	07/02/2024		2.00	
6	ERL	Org Recognition Leave	12/10/2024	4.00		12/09/2025

|	
ℹ	The **Leave Type** and **Description** fields provide the Leave or Absence Type name.
	The **Earned Date/Taken Date** field displays the date that the leave or absence was either earned or taken.
	The **Earned Hours** and **Taken Hours** fields display the number of hours that were either earned or taken for each Leave or Absence Type.
	The **Expiration Date** fields display the date the number of hours will expire if not taken.

The **Expiring Leave Types – Balance Details** section displays Absence and Leave Types that expire along with their balance information.

Expiring Leave Types - Balance Details

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	Type	Total Earned	Total Taken	Balance
1	ERL	8.00	8.00	4.00

Leave Summary data is based on the leave year associated with the leave period end date selected and Expiring Leave Types data is based on the past 365 days associated with the leave period end date selected. Balance Forward hours reflect DHRM Policy 4.10 Annual Leave, Maximum Carryover Allowable plus the accrual for the final leave period (12/25 - 01/09).

Step	Action
4.	Click the **View All** link as needed to see the full list. View All

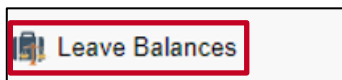| Step	Action
ℹ	The **Leave Type** field lists the name of the leave or absence.
	The **Total Earned** field displays the total number or hours earned for each Leave or Absence Type.
	The **Total Taken field** displays the total number of hours that have been taken for each Leave or Absence Type.
	Note: The balances for each Leave or Absence Type listed in the **Expiring Leave Types – Balance Details** section should match the balances listed on your timesheet under the **Absence** tab or the **Leave / Compensatory Time** tab. You need to apply policy expiration timeframes to the dates earned to determine exactly when the leave will expire.

Review the Leave Balances Page

This section of the Job Aid provides information for reviewing Compensatory Leave and Overtime Leave balances.

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

The **Timesheet** page displays by default.

Step	Action
2.	Click the **Leave Balances** link from the menu list. ![Leave Balances]
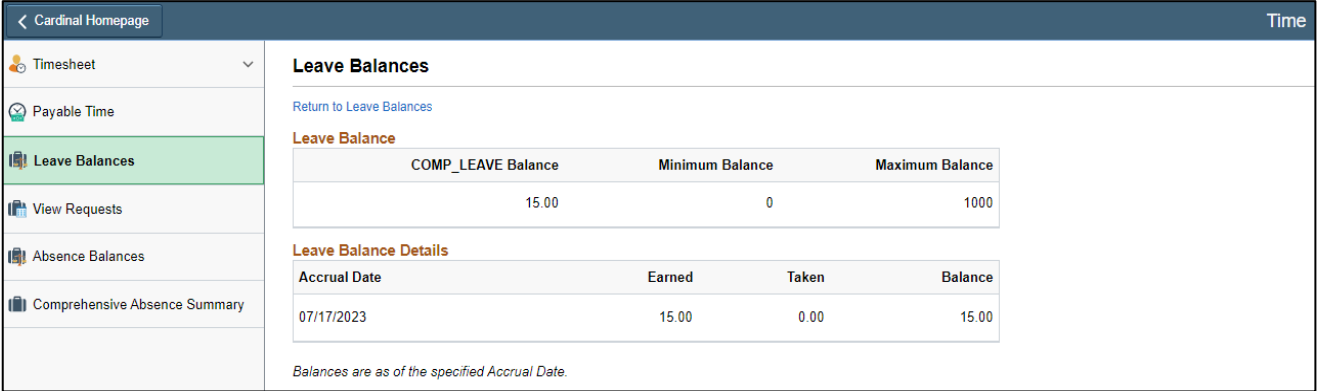
The **Leave Balances** page displays.

Step	Action
ℹ	Under the **Leave Balances Summary (In Hours)** section, users can view the current balances for each Leave Type. The **Leave Type** field displays the type of leave. The **Balance** field displays the total current balance for each Leave Type.
ℹ	The **Leave Type** names are links that can be clicked to see more details about each Leave Type. Leave Type COMP_LEAVE OT_LEAVE OT_LEAVE
3.	Click the **COMP_LEAVE** link. Leave Type COMP_LEAVE OT_LEAVE OT_LEAVE

The **Leave Balance Details** section displays for the selected Leave Type.

‹ Cardinal Homepage				Time
Timesheet ⌄	**Leave Balances**			
Payable Time	Return to Leave Balances			
Leave Balances	**Leave Balance**			
View Requests	**COMP_LEAVE Balance**	**Minimum Balance**	**Maximum Balance**	
Absence Balances	15.00	0	1000	
Comprehensive Absence Summary	**Leave Balance Details**			
	Accrual Date	**Earned**	**Taken**	**Balance**
	07/17/2023	15.00	0.00	15.00
	Balances are as of the specified Accrual Date.			

Step	Action
ℹ	Disregard the Maximum Balance displayed. This number does not actually reflect the maximum balance that users can have at any given time in accordance with State/Agency policy. The **Leave Balance Details** displays the accrual date**,** whether the hours were earned or taken on that date, and the current balance hours for the Compensatory Leave.
4.	Click the **Return to Leave Balances** link to return back to the summary view. Return to Leave Balances

Step	Action
5.	To view the overtime leave details, click the **OT_LEAVE** link.

Leave Balances Summary (In Hours)

Leave Type
COMP_LEAVE
OT_LEAVE

The **Leave Balance Details** section displays for the selected leave type.

< Cardinal Homepage   Time

- Timesheet   ∨
- Payable Time
- **Leave Balances**
- View Requests
- Absence Balances
- Comprehensive Absence Summary

Leave Balances

Return to Leave Balances

Leave Balance

OT_LEAVE Balance	Minimum Balance	Maximum Balance
10.50	0	1000

Leave Balance Details

Accrual Date	Earned	Taken	Balance
12/08/2023	1.50	0.00	10.50
12/08/2023	3.00	0.00	10.50
12/07/2023	2.00	0.00	6.00
12/07/2023	1.00	0.00	6.00
12/05/2023	1.00	0.00	3.00
12/05/2023	2.00	0.00	3.00

Balances are as of the specified Accrual Date.

| | Disregard the Maximum Balance displayed. This number does not actually reflect the maximum balance that users can have at any given time in accordance with State/Agency policy.

The **Leave Balance Details** displays the accrual date, whether the hours were earned or taken on that date, and the current balance hours for the Overtime Leave. |
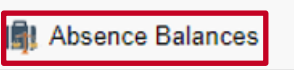
Review and Forecast Absence Balances

This section of the Job Aid provides the steps to review and forecast Absence balances.

Step	Action
1.	Navigate to the **Absence Balances** page using the following path: **Time Tile > Timesheet page > Absence Balances**
	The **Timesheet** page displays by default.
2.	Click the **Absence Balances** link from the menu list.

Step	Action
	The **Absence Balances** page displays.

3.	The balance for each Absence Type is displayed. Review as needed.
ℹ️	The As of date represents the date of the last finalized period. The balances displayed here match the balances displayed on the **Comprehensive Absence Summary** page and the balances displayed on the **Absences** tab of the Timesheet.

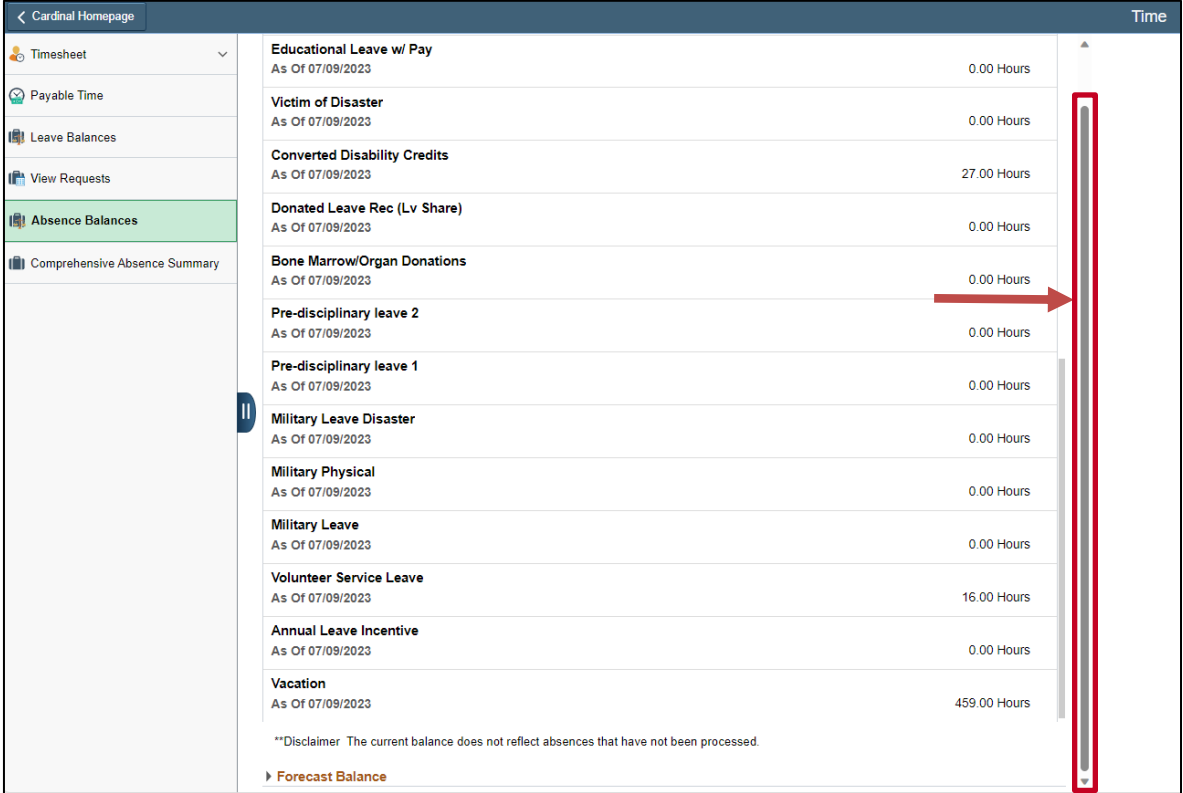| Step	Action
3.	Use the scroll bar immediately to the right of the hours balances to scroll down and see the complete list of absence balances.

Step	Action
4.	Use the main scroll bar to scroll down to the bottom of the **Absence Balances** page until the **Forecast Balance** link is visible.

Step	Action
5.	Click the **Forecast Balance** link.

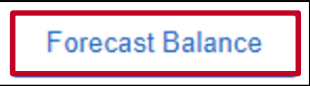| Step	Action
6.	Use the main scroll bar and scroll down to view the **As of Date**, **Filter by Type**, and **Absence Name** fields under **Forecast Balance**.
7.	To forecast an absence balance, complete the following: a. **As of Date**: Enter or select the date to forecast the balance based on. b. **Filter by Type**: Use the dropdown menu to select the specific Absence Type to forecast. c. **Absence Name:** Use the dropdown menu to select the specific Absence Name to forecast. **Note**: The **Current Balance** hours and **Forecast Balance** button display after the Absence Name has been selected.

Step	Action
8.	Click the **Forecast Balance** button. Forecast Balance

The **Forecast Details** page displays in a pop-up window.

Forecast Details	×
Vacation 01/10/2023 - 01/09/2024	547.00

The forecasted balance displays for the requested Absence Type. This is just an estimated projection based on the absence data in Cardinal at the time of forecasting. Forecasting accounts for saved Absence Events as well as those Absence Events that have been submitted and approved. Review as needed.

It is very important to forecast any balances that may be lost and plan accordingly towards the end of the Leave Year.

Review Leave Year End Guidelines

This section of the Job Aid should be referenced to finalize the period ending January 9 and calculate the annual carryover/forfeiture and new year entitlements effective January 10 each leave year. Absences can still be reported for both the old and new leave years, up to 90 days in the past or future. Forecasting accounts for saved Absence Events as well as those Absence Events that have been submitted and approved.

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

- Classified employees follow DHRM Policy and have a leave year from January 10 to January 9
- Gubernatorial Appointees follow the Executive Leave Plan which runs from January 15 to January 14. See the Executive Leave Policy for more information

For a full list of the applicable DHRM policies and details click the button below.

DHRM Leave Policies