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:

1. **Leave Types**: The term “Leave” in Cardinal refers specifically to Compensatory and Overtime Leave only.
2. **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
9/28/2026	Updated screenshots of Timesheet page.
9/1/2026	Baseline.

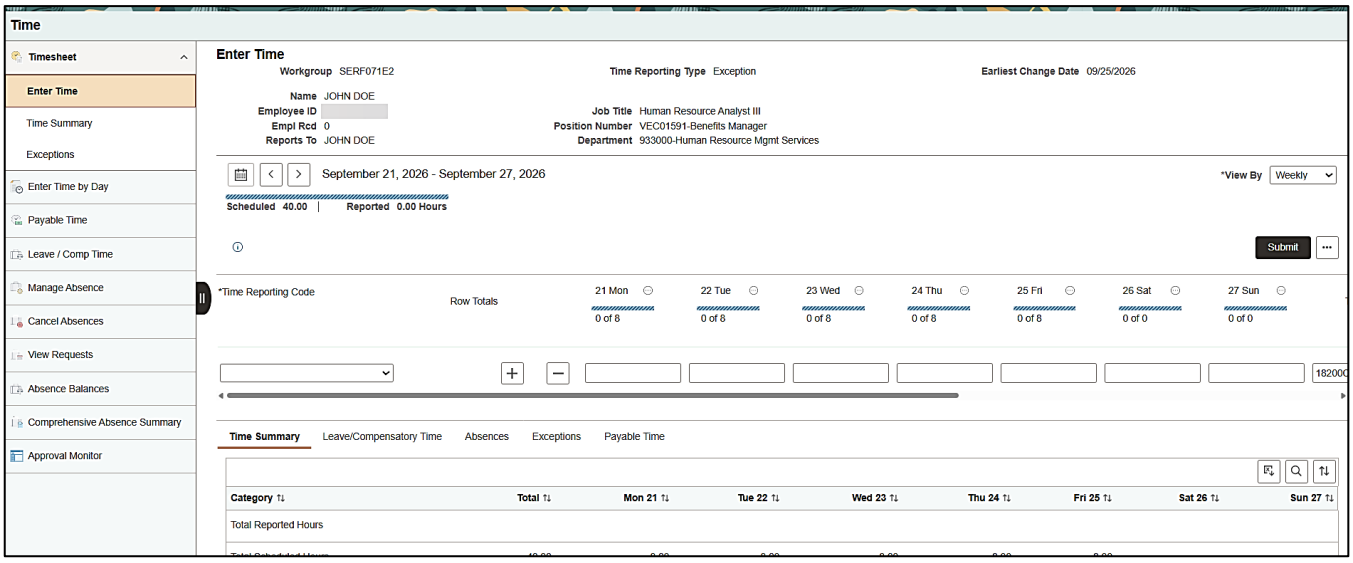
Overview of the Comprehensive Absence Summary Page

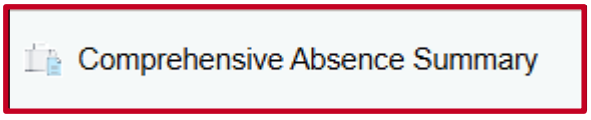
The **Comprehensive Absence Summary** page provides a consolidated overview of all leave and absence balances and accruals. This page defaults the current balances for Absence Types as of the last finalized leave period or select the **Estimated As of** radio button option to review the estimated hours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

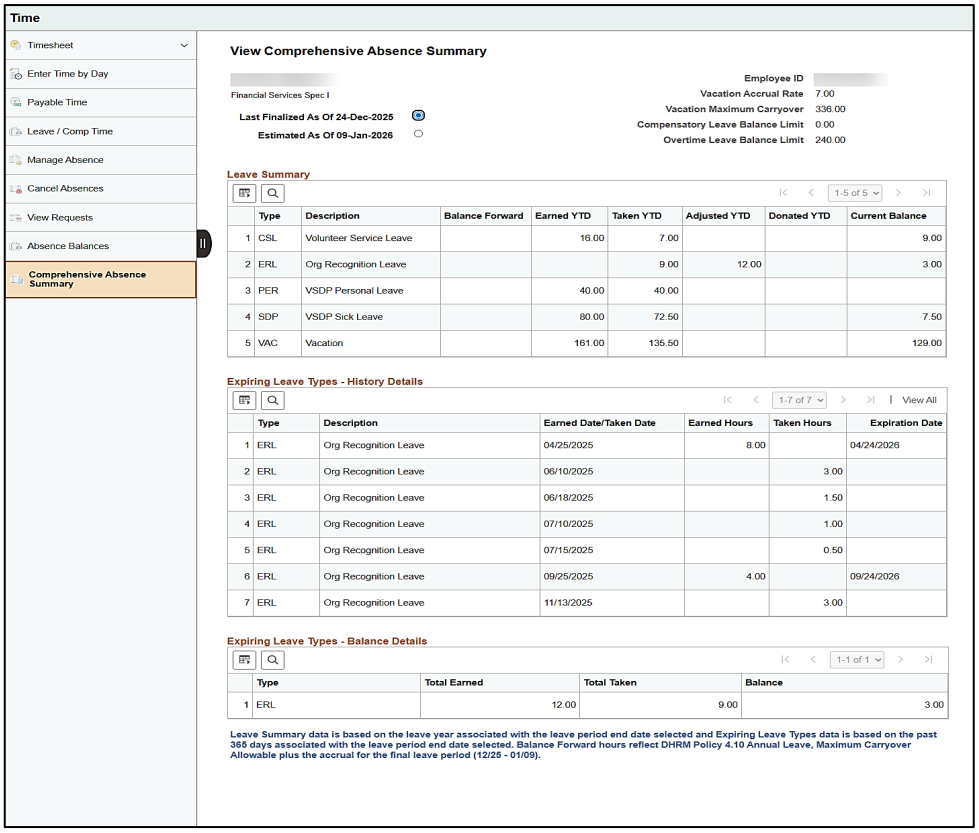
The **Enter Time** page displays by default.



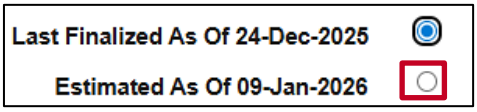
2.	Click the **Comprehensive Absence Summary** menu item. 

Step	Action

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

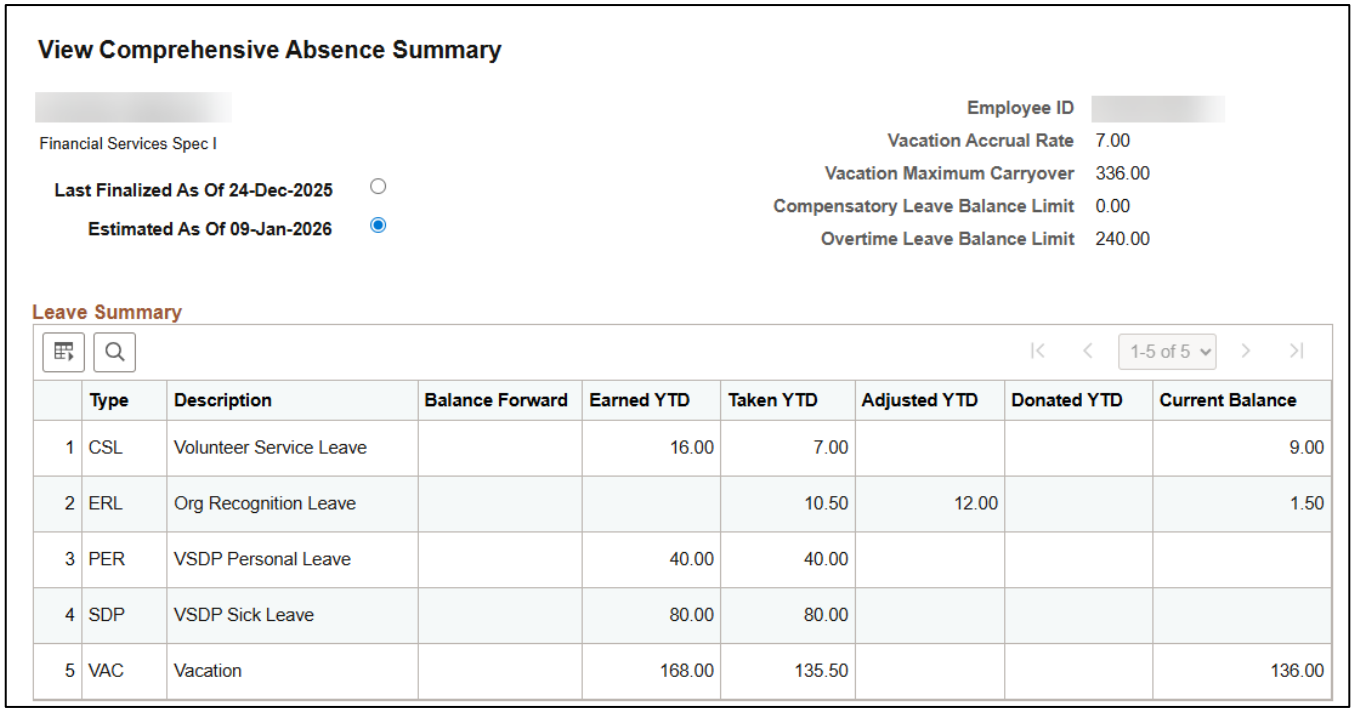


3.	Select the **Estimated As of** radio button option to review the estimated hours for the current open leave period end date.



Step	Action

The **View Comprehensive Absence Summary** page refreshes.



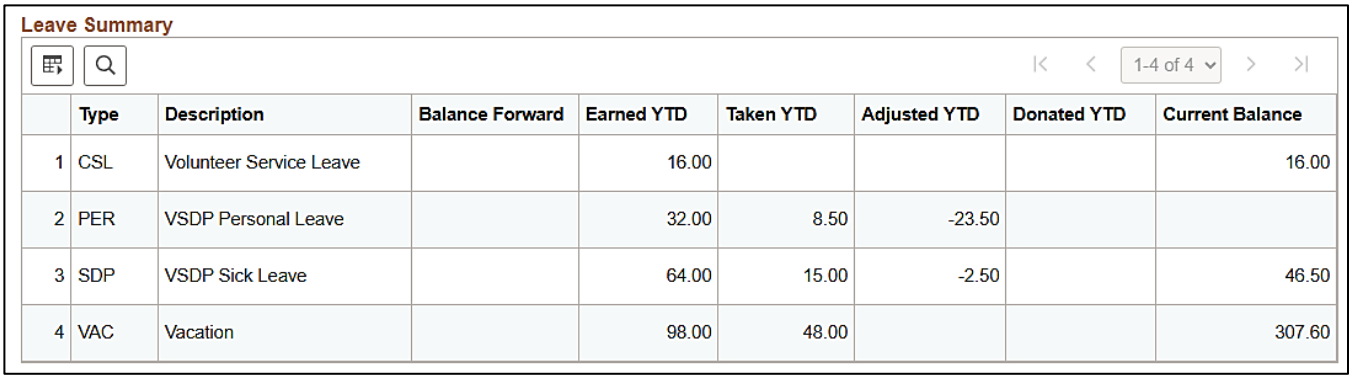
	Type	Description	Balance Forward	Earned YTD	Taken YTD	Adjusted YTD	Donated YTD	Current Balance
1	CSL	Volunteer Service Leave		16.00	7.00			9.00
2	ERL	Org Recognition Leave			10.50	12.00		1.50
3	PER	VSDP Personal Leave		40.00	40.00			
4	SDP	VSDP Sick Leave		80.00	80.00			
5	VAC	Vacation		168.00	135.50			136.00

The next section of this Job Aid will review each section of the **View Comprehensive Absence Summary** page.

Header Section

Field	Description
Employee ID	Displays your employee ID number
Vacation Accrual Rate	Displays the number of vacation hours accrued for each pay period
Vacation Maximum Carryover	Displays the maximum number of vacation hours that are allowed to be carried over from one year to the next
Compensatory Leave Balance Limit	Displays the maximum number or compensatory hours that can be accrued
Overtime Leave Balance Limit	Displays the maximum number or overtime leave hours that can be accrued

Leave Summary Section



Leave Summary

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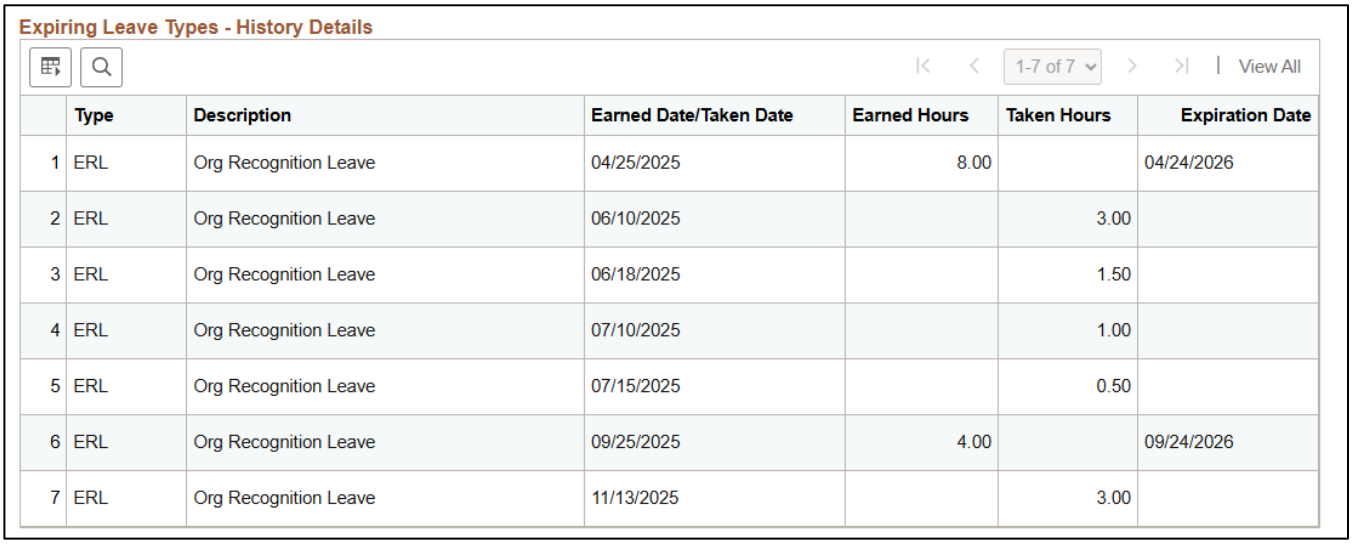
	Type	Description	Balance Forward	Earned YTD	Taken YTD	Adjusted YTD	Donated YTD	Current Balance
1	CSL	Volunteer Service Leave		16.00				16.00
2	PER	VSDP Personal Leave		32.00	8.50	-23.50		
3	SDP	VSDP Sick Leave		64.00	15.00	-2.50		46.50
4	VAC	Vacation		98.00	48.00			307.60

Field	Description
Type	Displays the name of the leave type
Description	Displays a description of the leave type
Balance Forward	Displays balances carried over from the prior leave year following Leave policy
Earned YTD	Displays leave hours earned as of current period
Taken YTD	Displays hours taken as of current period
Adjusted YTD	Displays any adjustments made for that leave type for the year
Donated YTD	Displays any hours that were donated as of the current period
Current Balance	Displays hours as of 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 • 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.

Expiring Leave Types – History Details

This section contains the history related to when certain Leave or Absence Types were earned or taken.



Expiring Leave Types - History Details

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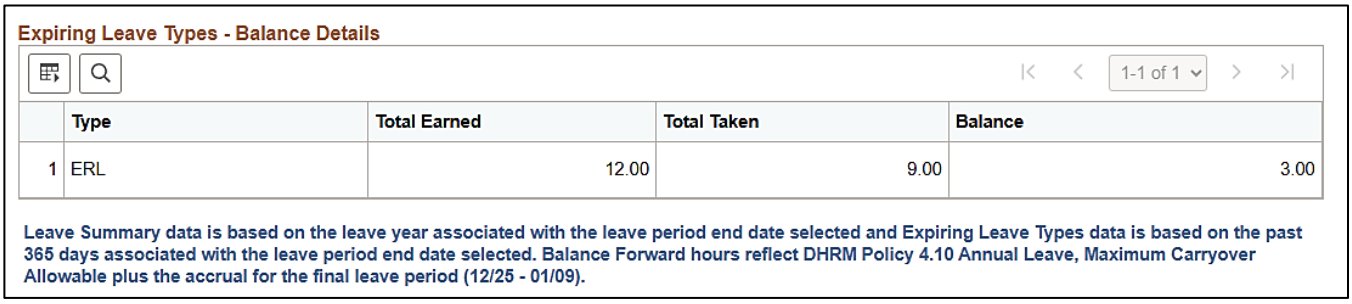
	Type	Description	Earned Date/Taken Date	Earned Hours	Taken Hours	Expiration Date
1	ERL	Org Recognition Leave	04/25/2025	8.00		04/24/2026
2	ERL	Org Recognition Leave	06/10/2025		3.00	
3	ERL	Org Recognition Leave	06/18/2025		1.50	
4	ERL	Org Recognition Leave	07/10/2025		1.00	
5	ERL	Org Recognition Leave	07/15/2025		0.50	
6	ERL	Org Recognition Leave	09/25/2025	4.00		09/24/2026
7	ERL	Org Recognition Leave	11/13/2025		3.00	

Note: Click the **View All** link if applicable, to see the full list.

Field	Description
Type	Displays the type of leave
Description	Displays a description for the type of leave
Earned Date/Taken Date	Displays the date that the leave or absence was either taken or earned
Earned Hours	Displays the number or hours earned
Taken Hours	Displays the number of hours taken
Expiration Date	Displays the date the number of hours will expire if not taken

Expiring Leave Types – Balance Details

This section displays Absence and Leave Types that expire along with their balance information.


Expiring Leave Types - Balance Details

1-1 of 1

	Type	Total Earned	Total Taken	Balance
1	ERL	12.00	9.00	3.00

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).

Field	Description
Type	Displays the name of the leave or absence
Total Earned	Displays the Total number of hours earned for the leave/absence type
Total Taken	Displays the total number of hours taken for the leave/absence type
Balance	Displays the current hours remaining balance

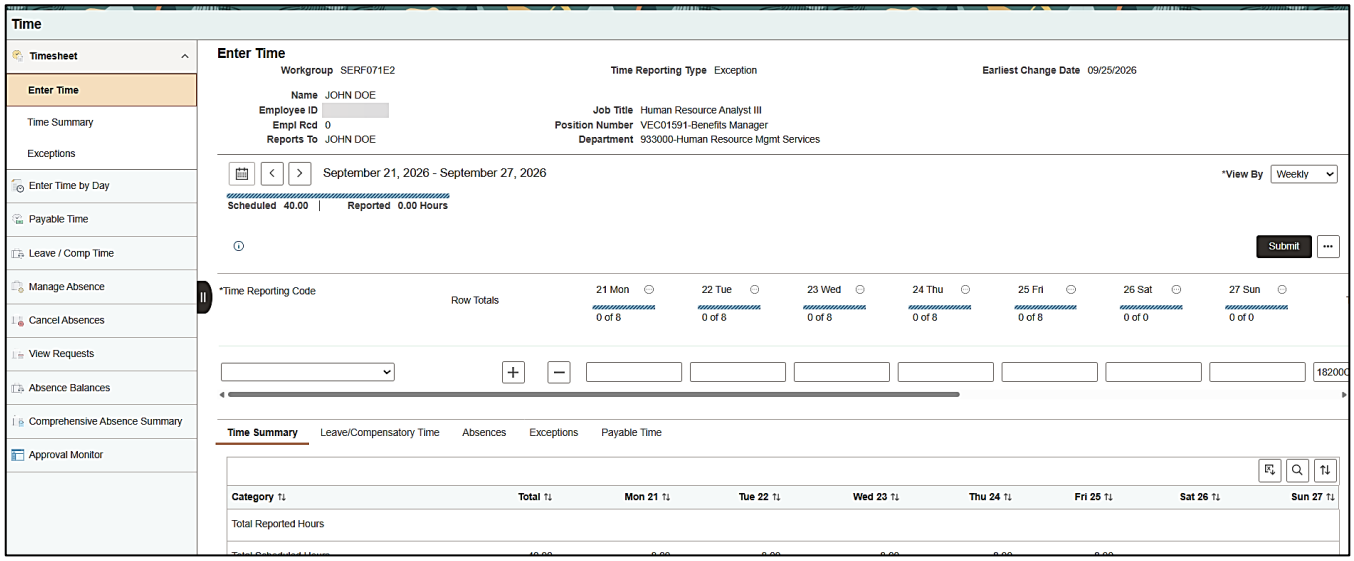
Note: The balances for each Leave / Absence Type listed in the **Expiring Leave Types – Balance Details** section should match the balances listed on your Timesheet under the **Absence** tab or the **Leave / Compensatory Time** tab. You need to apply policy expiration timeframes to the dates earned to determine exactly when the leave will expire.

Review the Leave / Comp Time Page

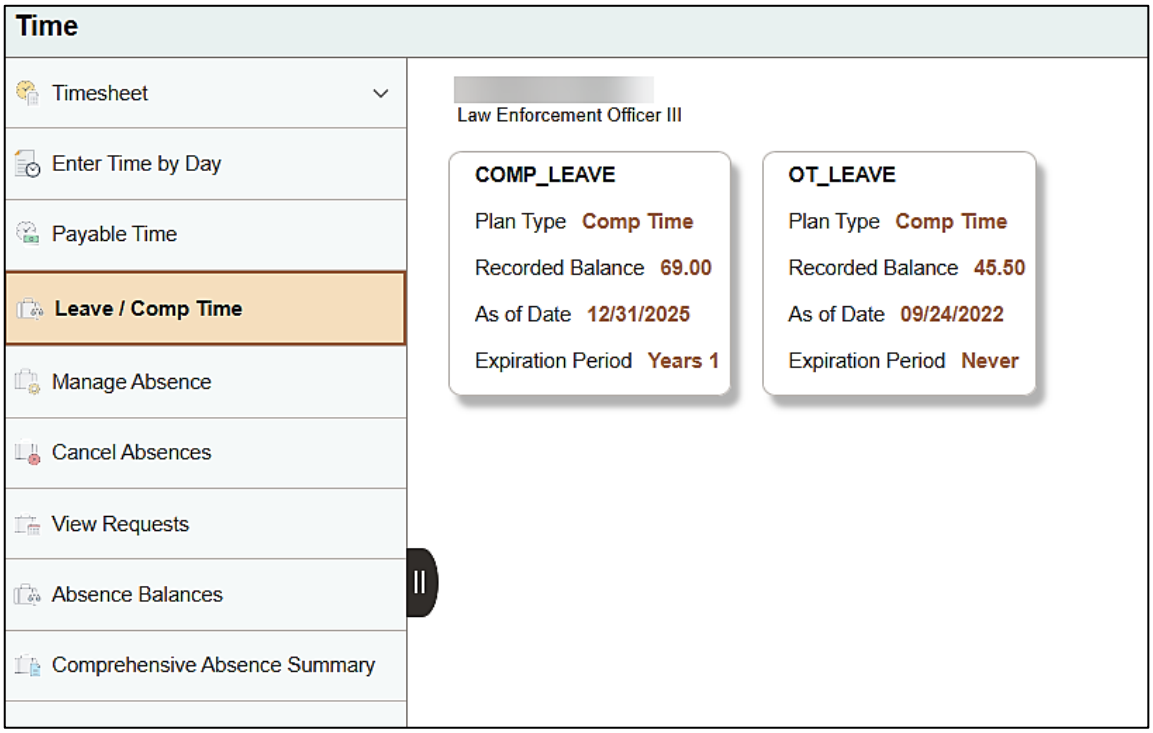
This section of the Job Aid provides information for reviewing Compensatory Leave and Overtime Leave balances.

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

The **Enter Time** page displays by default.

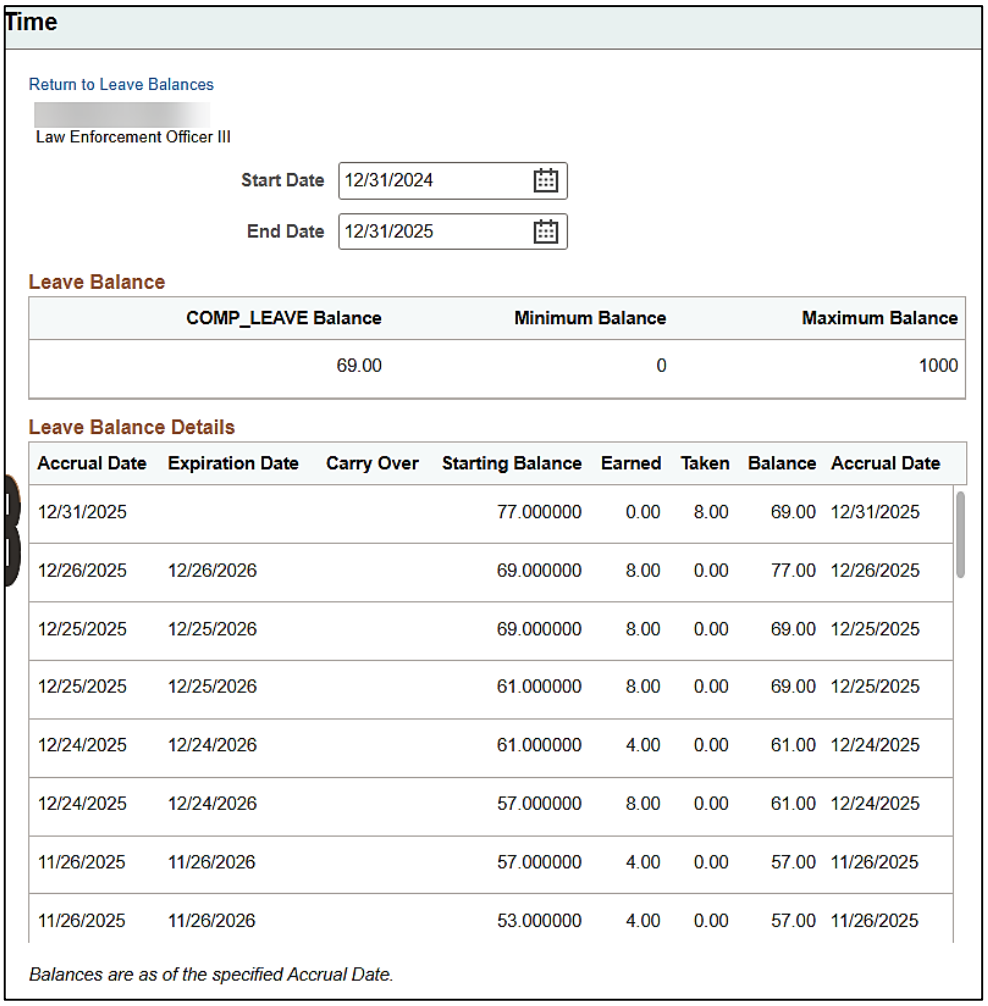


2.	Click the **Leave / Comp Time** menu item.

Step	Action
	The **Leave / Comp Time** page displays the Leave Balances information in a summary view for the employee. 
	Each Leave Type (Comp and OT) displays on a separate tile. If the employee is only eligible for one of these options, only that tile displays. The information that displays for **COMP_LEAVE** and **OT_LEAVE** tiles include: • **Plan Type** field displays as Comp Time for both • **Recorded Balance** field displays the balance for the date displayed in the **As of Date** field • **As of Date** field displays the date associated with the hours balanced the **Recorded Balance** field • Expiration Period provides the expiration timeframe for the leave.
	The tiles are links that can be clicked to see more details about each Leave Type.

Step	Action
3.	Click the **COMP_LEAVE** tile.

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



Time

Return to Leave Balances

Law Enforcement Officer III

Start Date 12/31/2024

End Date 12/31/2025

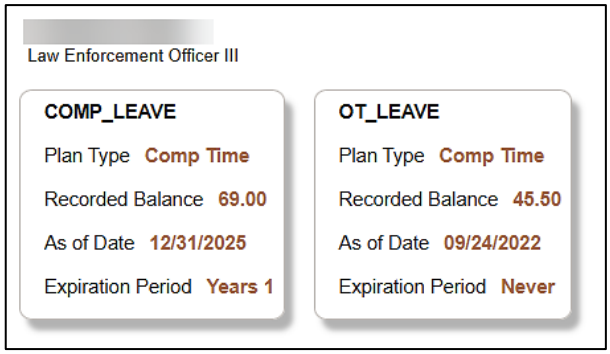
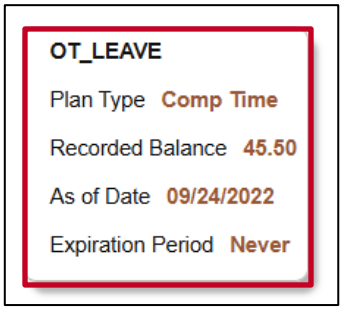
Leave Balance

COMP_LEAVE Balance	Minimum Balance	Maximum Balance
69.00	0	1000

Leave Balance Details

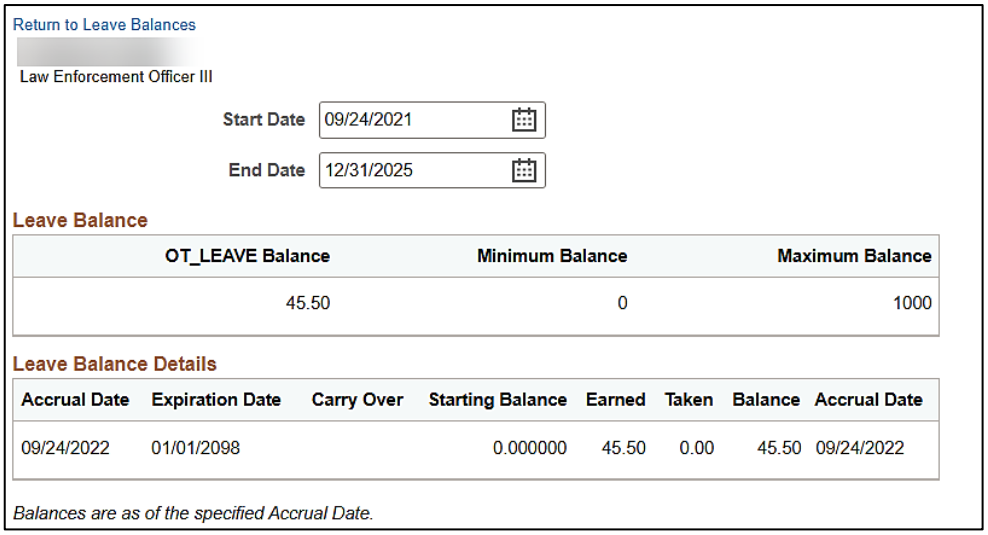
Accrual Date	Expiration Date	Carry Over	Starting Balance	Earned	Taken	Balance	Accrual Date
12/31/2025			77.000000	0.00	8.00	69.00	12/31/2025
12/26/2025	12/26/2026		69.000000	8.00	0.00	77.00	12/26/2025
12/25/2025	12/25/2026		69.000000	8.00	0.00	69.00	12/25/2025
12/25/2025	12/25/2026		61.000000	8.00	0.00	69.00	12/25/2025
12/24/2025	12/24/2026		61.000000	4.00	0.00	61.00	12/24/2025
12/24/2025	12/24/2026		57.000000	8.00	0.00	61.00	12/24/2025
11/26/2025	11/26/2026		57.000000	4.00	0.00	57.00	11/26/2025
11/26/2025	11/26/2026		53.000000	4.00	0.00	57.00	11/26/2025

Balances are as of the specified Accrual Date.

Step	Action
	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. Disregard the **Maximum Balance** field value. This number does not actually reflect the maximum balance that employees can have at any given time in accordance with State/Agency policy.
4.	Click the **Return to Leave Balances** link to return back to the summary view.
The summary view redisplays. 	
5.	Click the **OT_LEAVE** tile to view the overtime leave details. 

Step	Action

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



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.

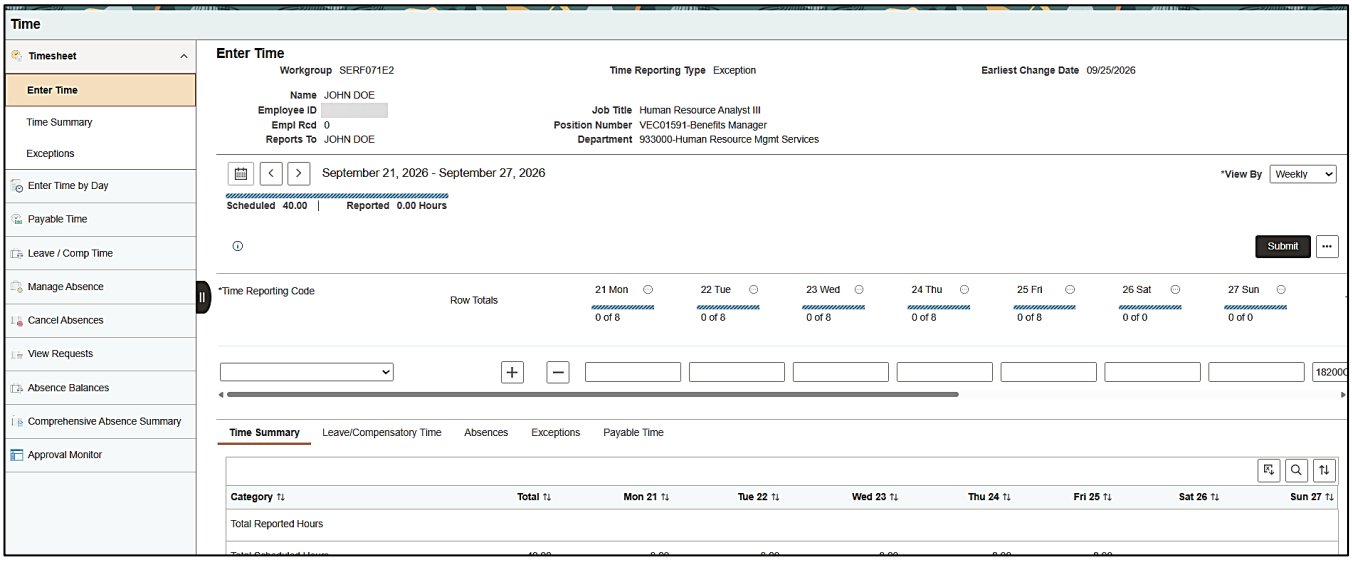
Disregard the **Maximum Balance** field value displayed. This number does not actually reflect the maximum balance that employees can have at any given time in accordance with State/Agency policy.

Reviewing Absence Balances on the Timesheet

This section of the Job Aid provides the steps to review Absence balances on the Timesheet within the **Absence** tab.

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

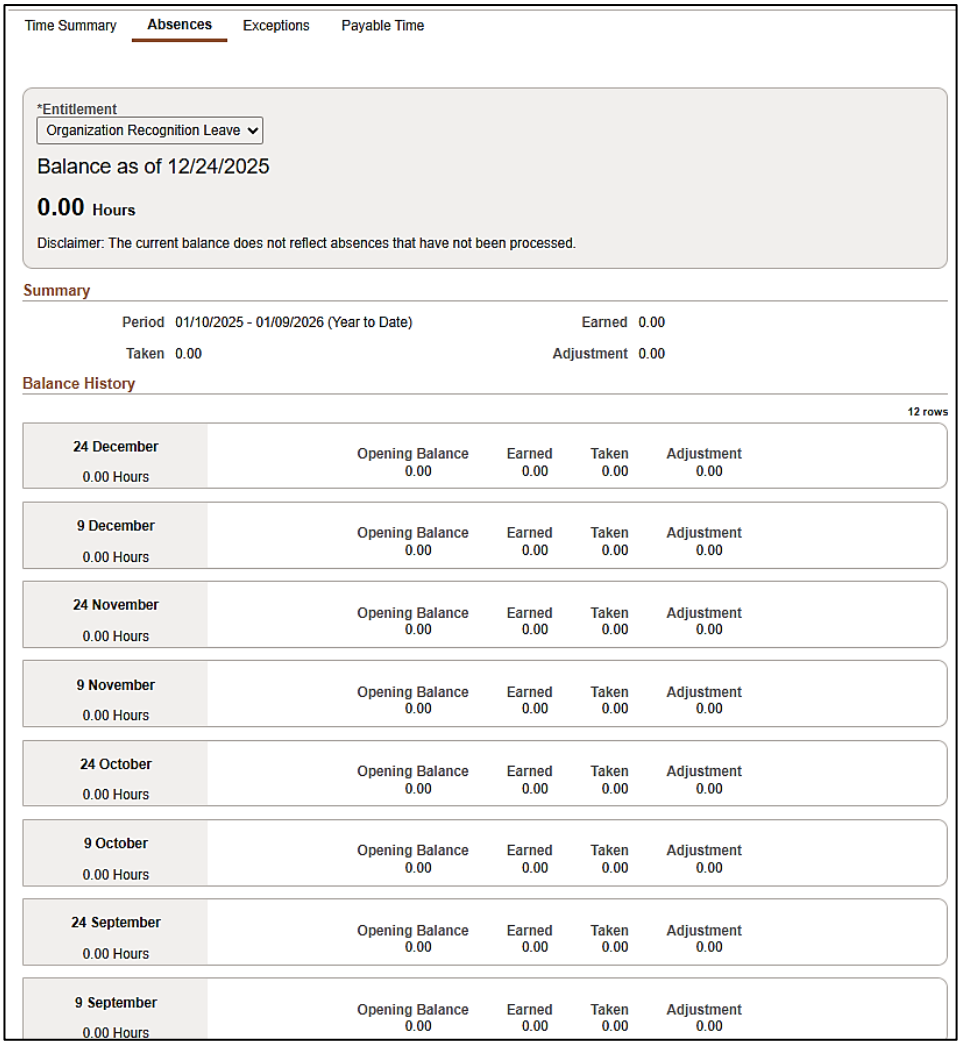
The **Enter Time** page displays by default.

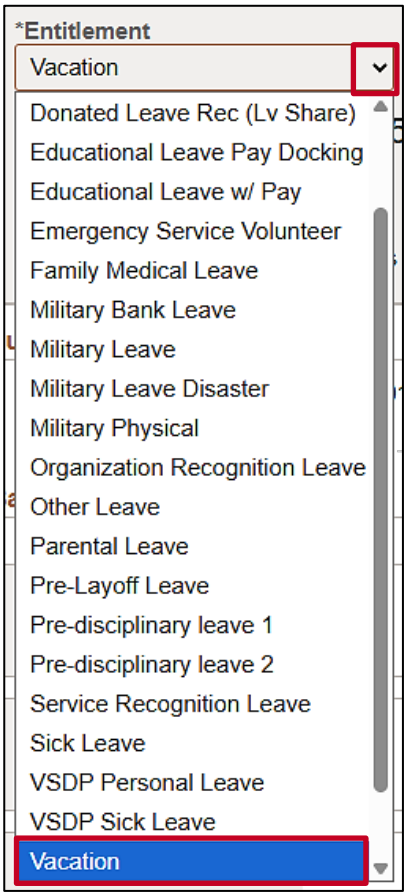


Step	Action
2.	Click the **Absences** tab below the Timesheet grid.

Step	Action

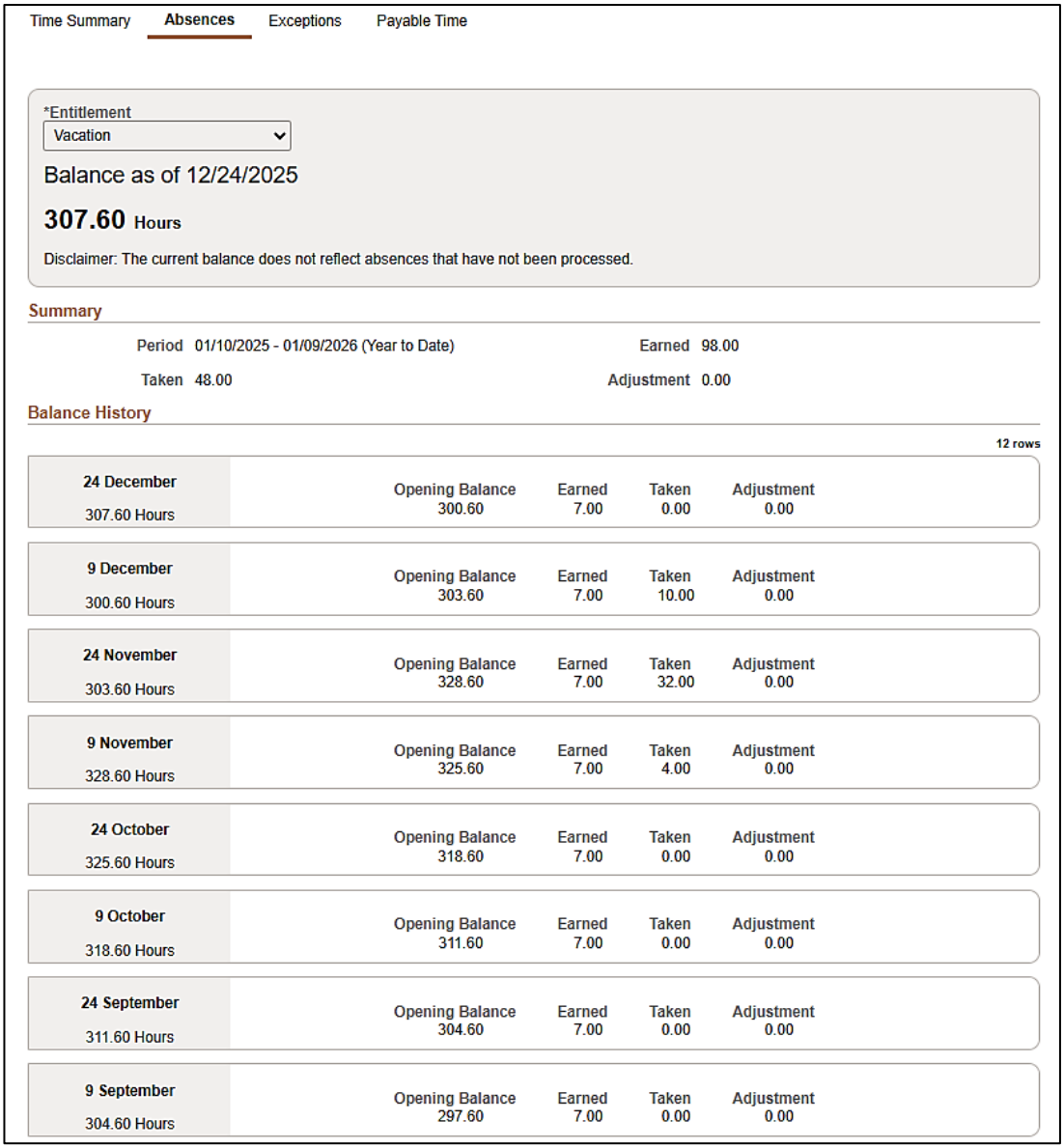
The **Absences** tab displays.



Step	Action
3.	Click the **Entitlement** dropdown button and select an Absence Type for review. **Note**: Balances can be reviewed for each Absence Type. 

Step	Action

The **Absences** tab will redisplay with the balance of hours for the selected Absence Type.



Reminder that the balances are as of the last finalized calendar. There will be a disclaimer note under the balance of hours stating, “The current balance does not reflect absences that have not been processed”.

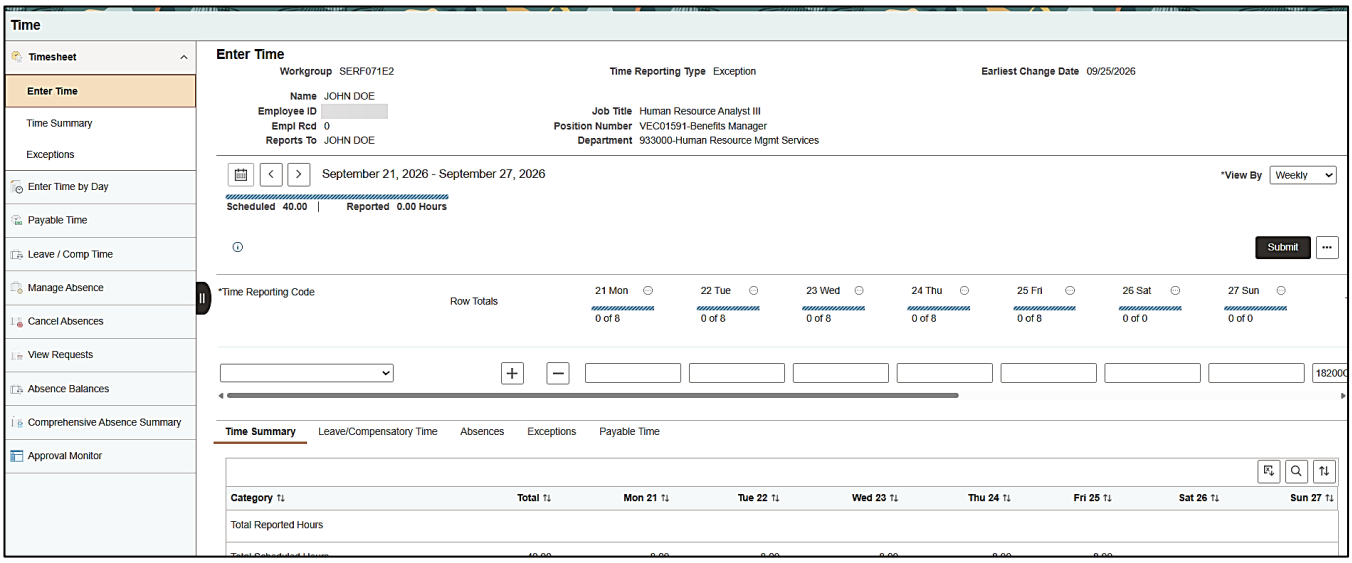
The balances displayed here match the balances displayed on the **Comprehensive Absence Summary** page.

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 > Absence Balances**

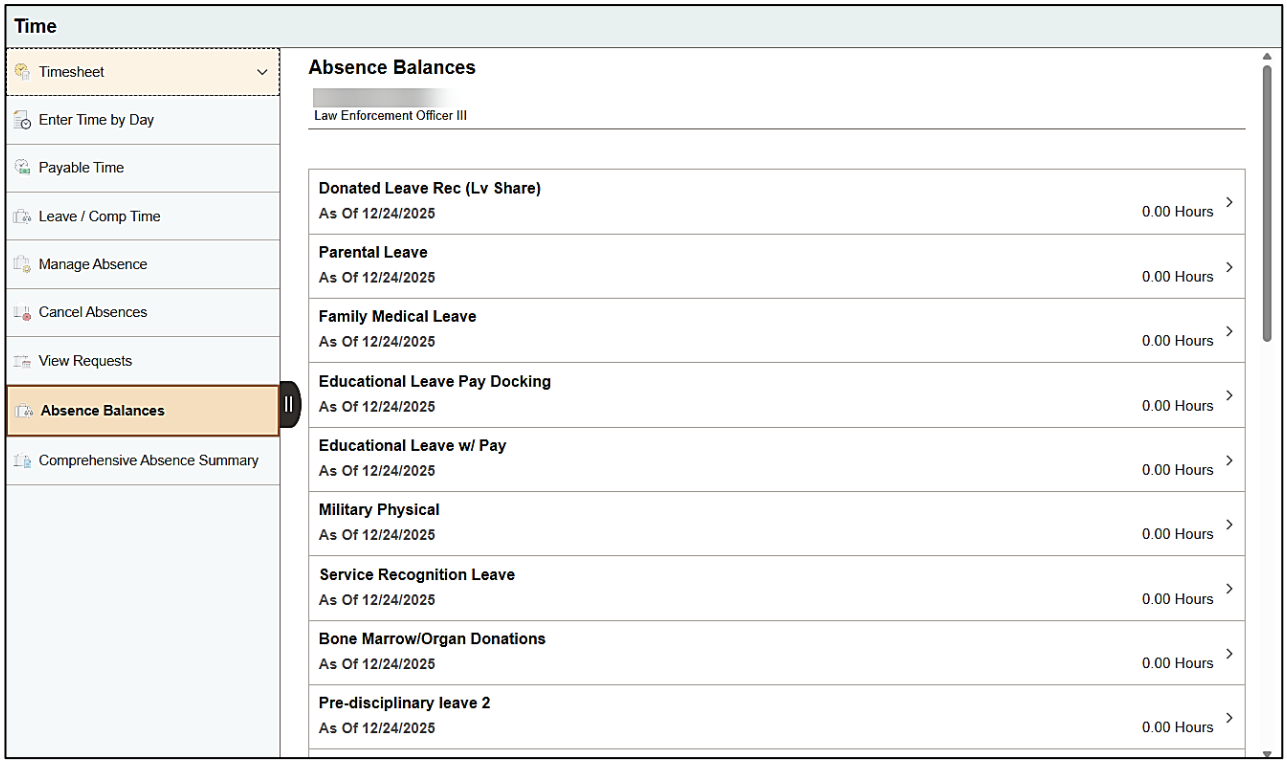
The **Enter Time** page displays by default.



2.	Click the **Absence Balances** link from the menu list.

Step	Action

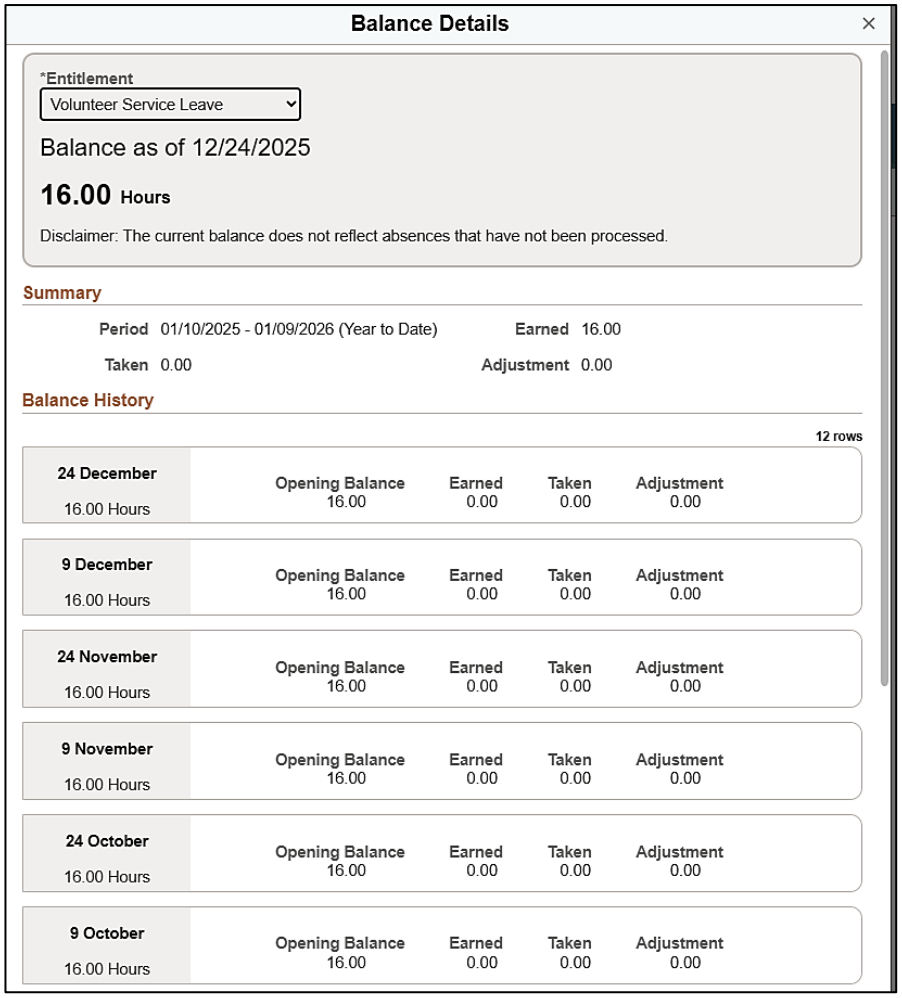
The **Absence Balances** page displays.



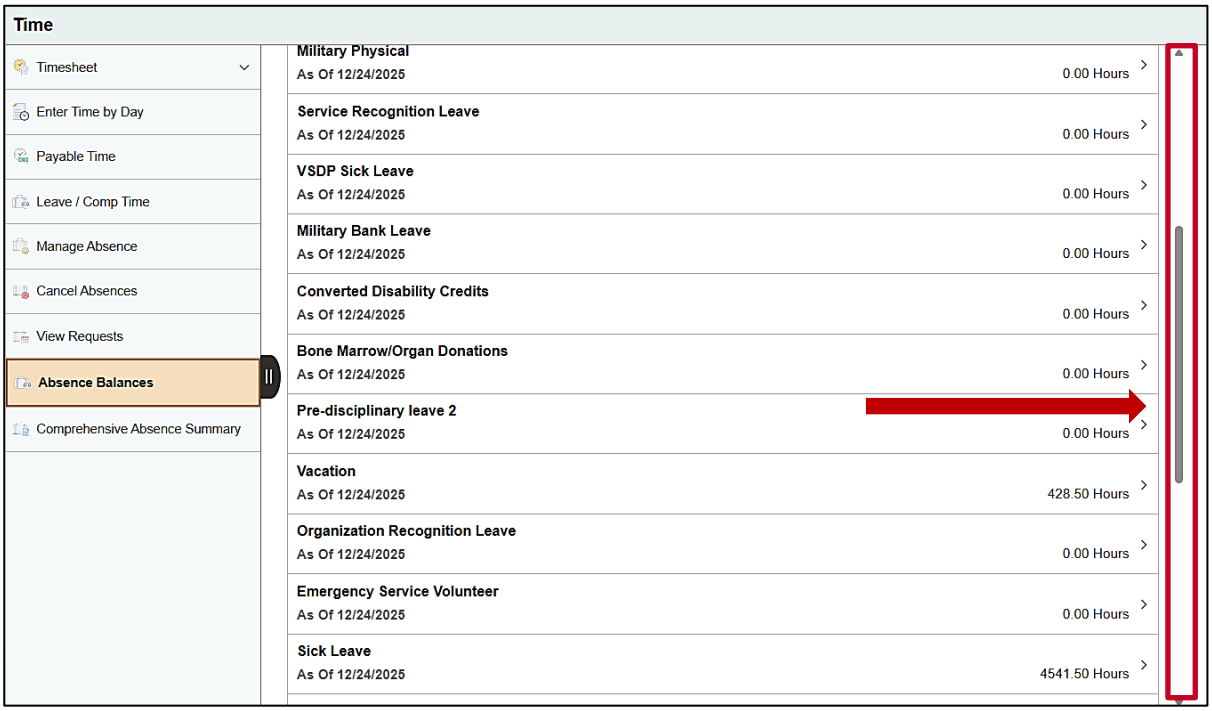
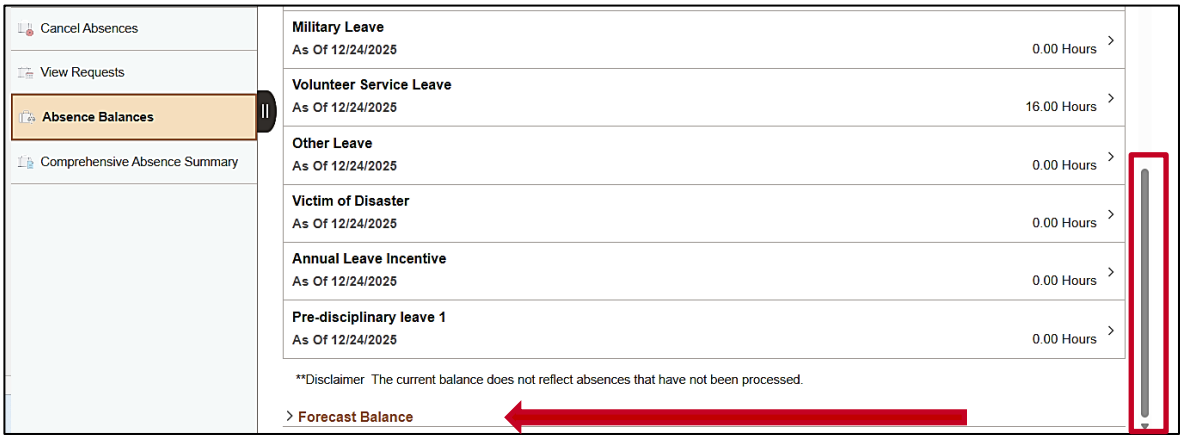
3.	Review the balance for each Absence Type as needed. The “As Of <date>” represents the date of the last finalized period. Can view more details for each of the Absence Types from this page when the **Drill in** (**>**) icon at the end of the row is selected. **Note**: Users can see all the balances on this page by using the scrollbar.
4.	Click the **Drill in** (**>**) icon at the end of the row to view the Balance Details for the selected Absence Type.

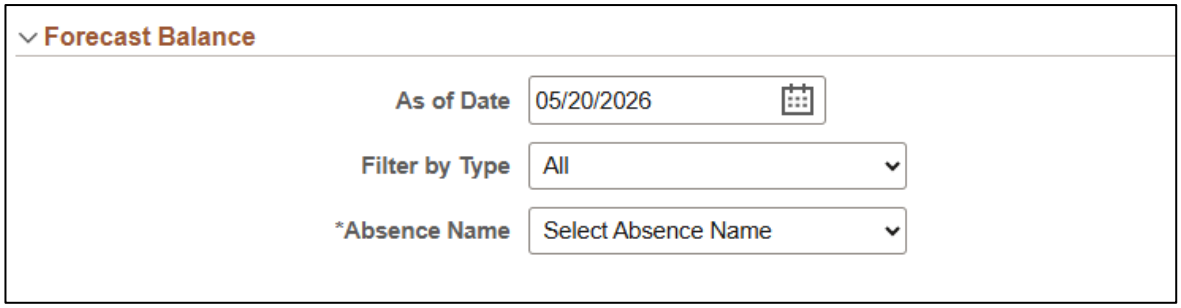
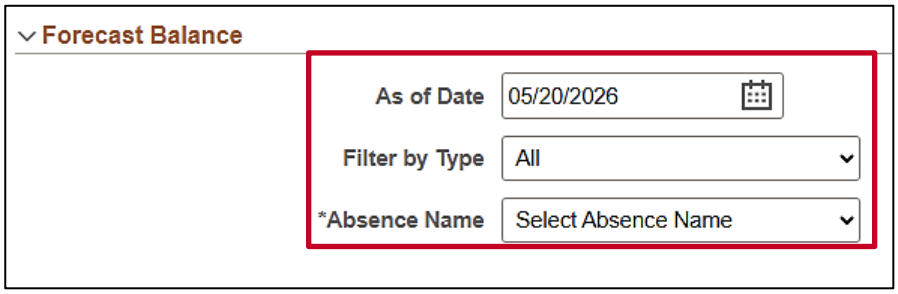
Step	Action

The **Balance Details** page will display.

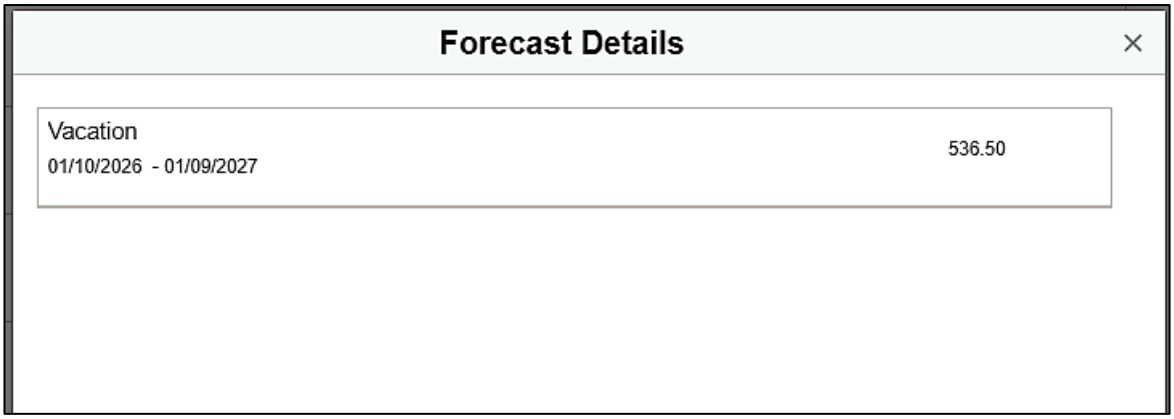


The balances displayed here match the balances displayed on the **Comprehensive Absence Summary** page and the balances displayed on the **Absences** tab of the Timesheet.

Step	Action
5.	Use the scroll bar immediately to the right of the hours balances to scroll down and see the complete list of absence balances. 
6.	Scroll down to the bottom of the **Absence Balances** page until the **Forecast Balance** link is visible. 
7.	Click to expand the **Forecast Balance** section.

Step	Action
	The **Forecast Balance** section displays. 
8.	Complete the following fields to forecast an absence balance: **As of Date**: Enter or select the date to forecast the balance. **Filter by Type**: Use the dropdown menu to select the specific Absence Type to forecast. **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. 
9.	Click the **Forecast Balance** button.

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



	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.

Click the button below for a full list of the applicable DHRM policies and details:

DHRM Leave Policies