



**TA374**

# **Absence Management Maintenance**

**Instructor Led Training**



# 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.

This course, and the supplemental resources listed below, are located on the Cardinal website ([www.cardinalproject.virginia.gov](http://www.cardinalproject.virginia.gov)) under Learning.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job Aids on topics across all functional areas
- Glossary of frequently used terms

The Cardinal screenshots included in this training course 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.



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

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# Course Objectives

After completing this course, you will:

- 1 Understand the Manager Absence Reporting Process
- 2 Be able to Maintain Absences in Cardinal
- 3 Be able to Adjust Absence Entitlement Balances
- 4 Understand the Calculate Absence and Payroll Processes
- 5 Understand how to Review the Calculate Absence Results



# Agenda

1

Absence Management Overview

2

Reviewing and Entering Absence Events

3

Managing Extended Leave

4

Adjusting Absence Entitlement Balances

5

Calculating Absence and Payroll Processing



# Lesson

1

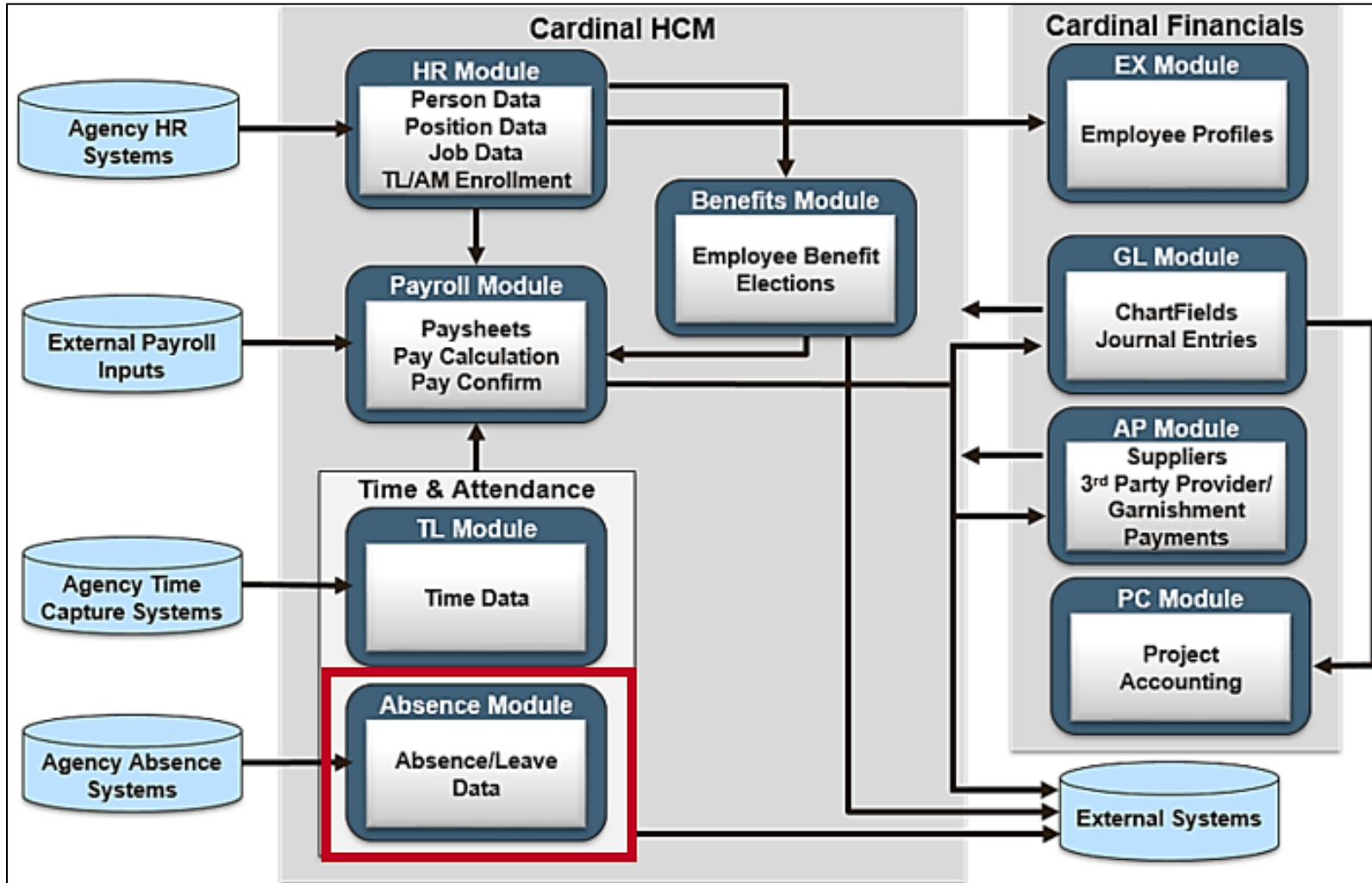
## Absence Management Overview

This lesson covers:

- An Overview of Absence Management
- The role of the Absence Management Administrator



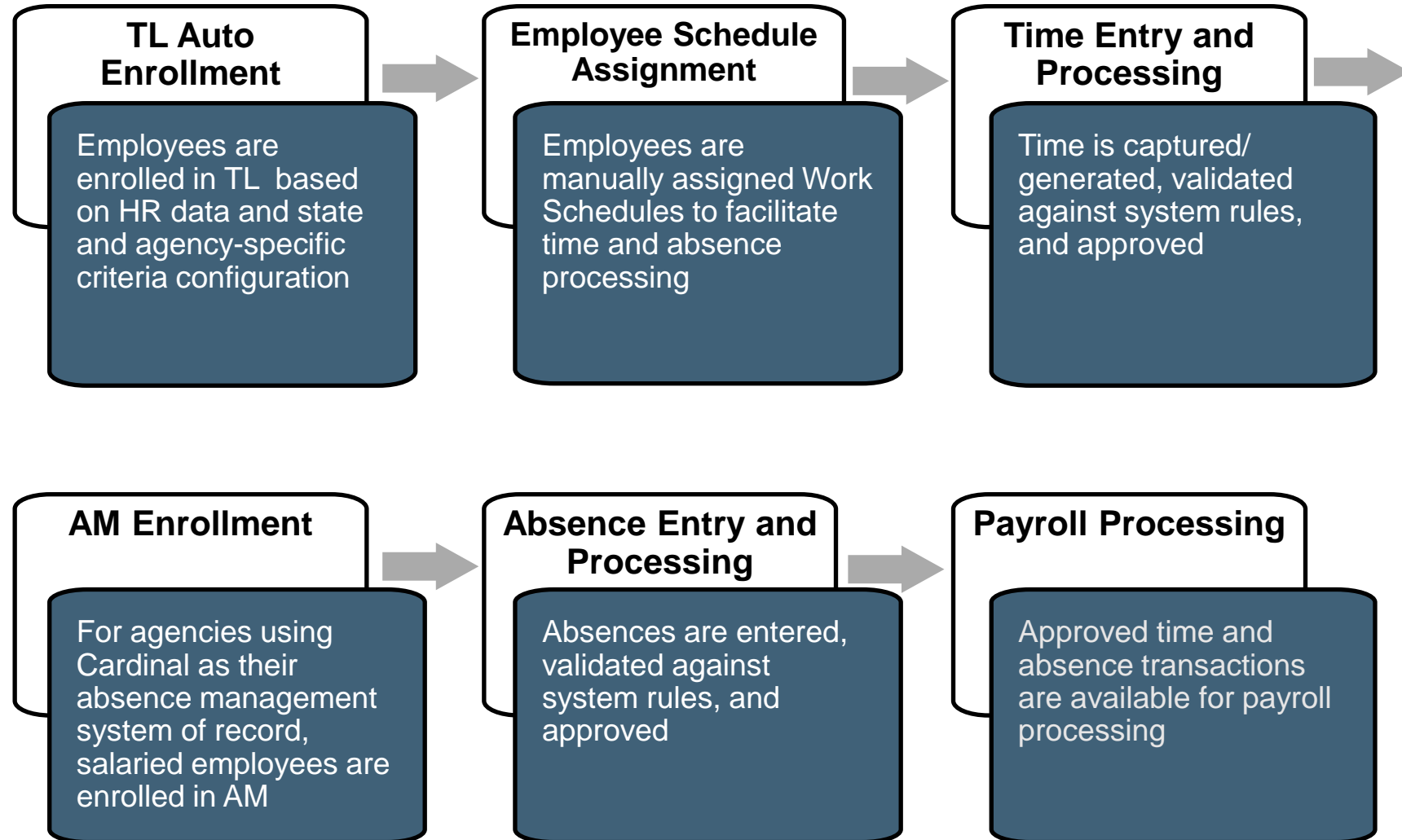
# Overview of Absence Management





# 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.





# Overview of TA 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	✓						



# Overview of TA Roles (continued)

	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	✓		✓	✓	✓	✓	✓



# Absence Management

The Cardinal Absence Management module records, processes, and tracks leave balances for employees at agencies where Cardinal is the leave 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



# Absence Management Roles and Responsibilities

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



# Absence Process

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.

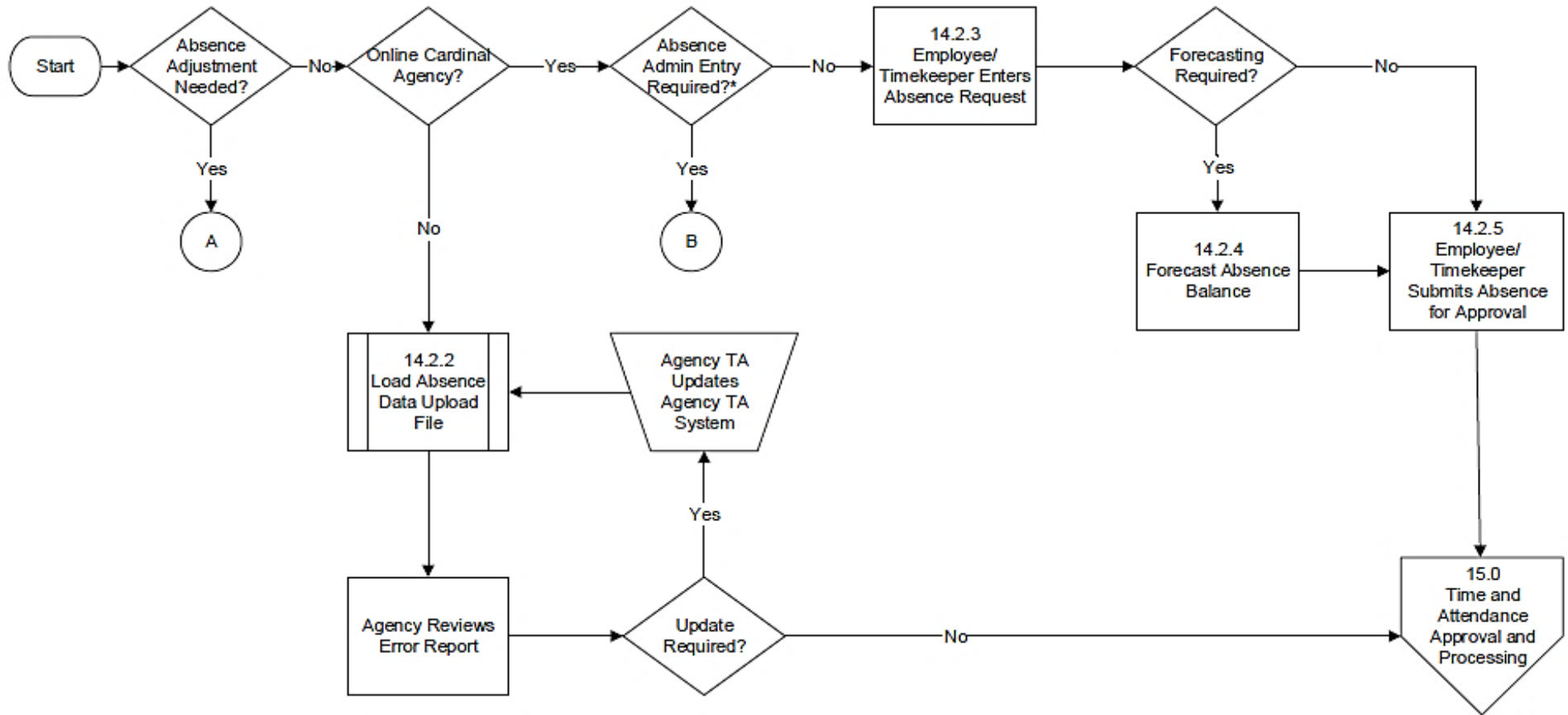
Absence Management Administrators are responsible for the entry of extended leave such as :

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



# Process: TA Capture

## Sub-process: Manage Absence Reporting



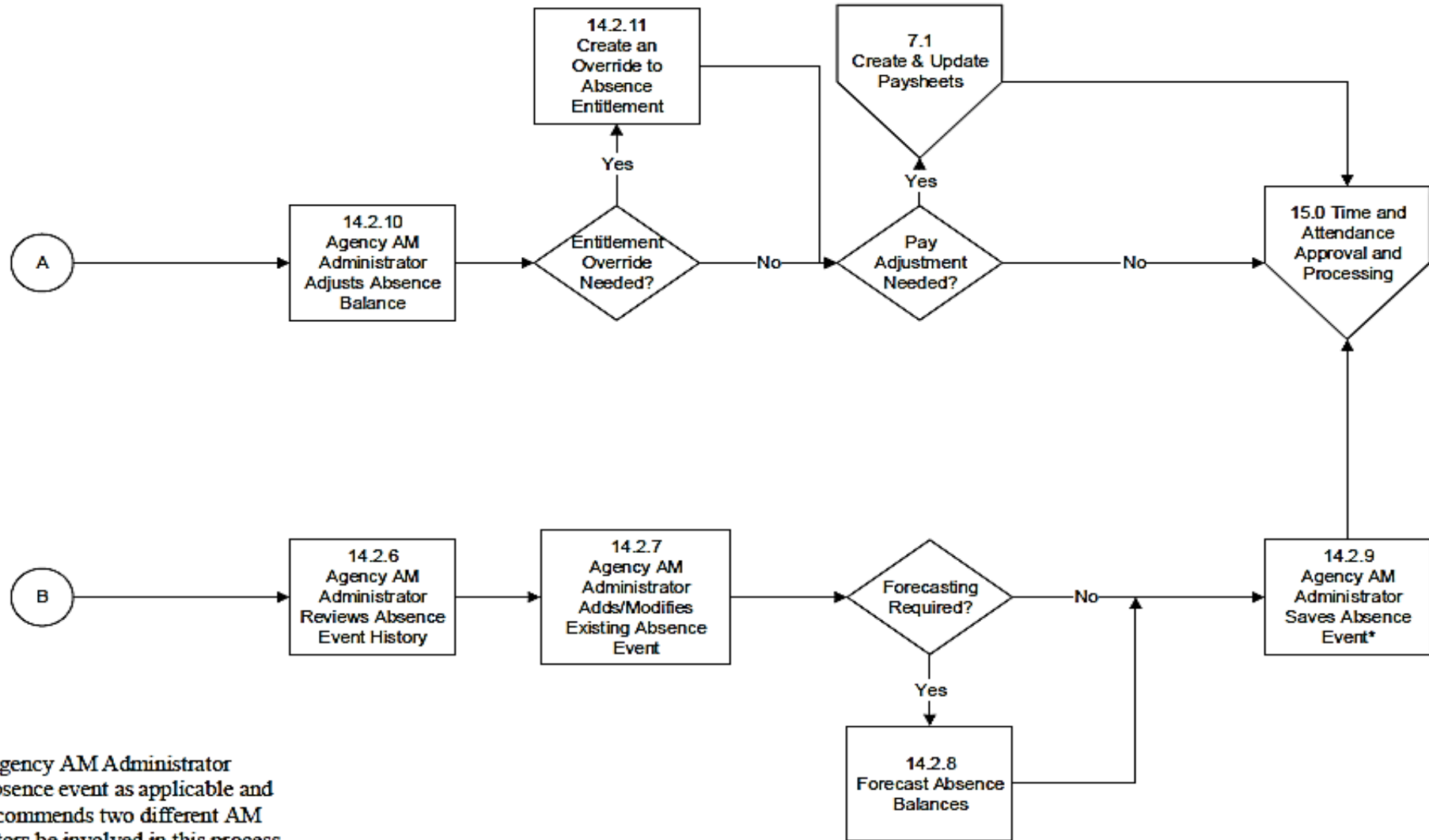
\*Absence types that require eligibility verification or where a balance adjustment is needed, such as:

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



# Process: TA Capture

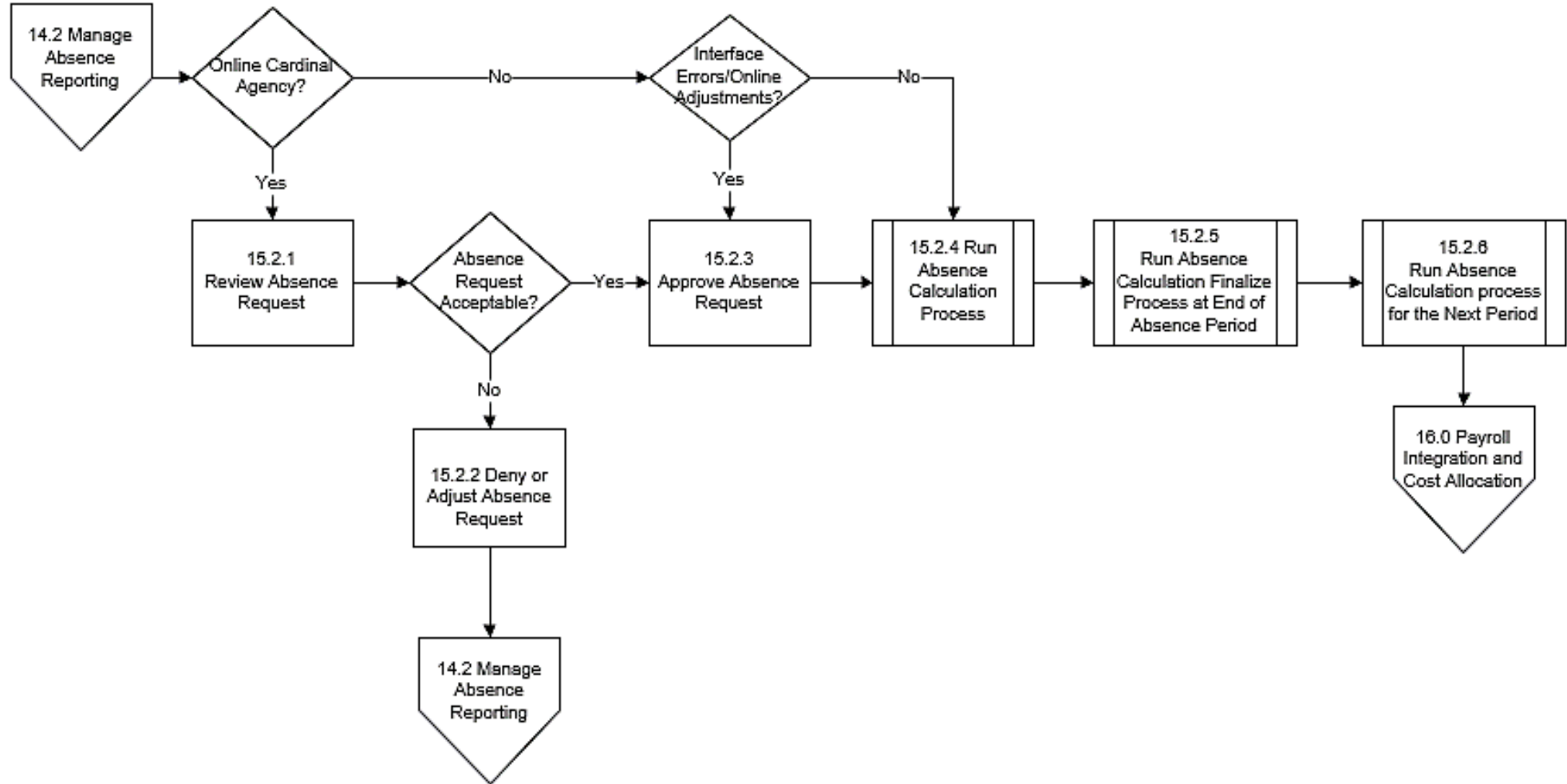
## Sub-process: Manage Absence Reporting (continued)



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



# Administer Absence Processing





# 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)



# Lesson Checkpoint



1. True or False. Absence balances displayed on the employee Timesheet and balance history pages are from prior closed pay periods. It does not include accruals earned or hours taken after pay period end.



2. True or False. The Absence Management Administrator should regularly check and approve absence requests.



3. True or False. Eligible employees are enrolled in Absence Management during employee setup.



# Lesson Summary

1

## Absence Management Overview

In this lesson, you learned:

- An overview of the Absence Management Process
- The role of the Absence Management Administrator



# Lesson

2

## Reviewing Absence Balances and Entering Absence Events

This lesson covers:

- Reviewing Employee Absence Balances
- Entering and Modifying Absence Requests and Events



# Reviewing Absence/Leave Balances

Cardinal is configured to align with Commonwealth policy on leave types and, if applicable, their forfeiture or expiration. For example, if an employee is only entitled to carry over a set number of vacation hours at the end of the leave year, then any hours in excess of that are automatically removed by Cardinal. Employees can view leave balances and expiration information on the **Leave Balances** page (balances only), the **Compensatory Time** page, or on the Employee Leave Report.

As an Absence Management Administrator, you may need to make manual adjustments to leave balances in order to resolve issues.

Timesheet

**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**

Employee ID [redacted]  
Security Officer III  
Employment Record 0  
[Actions](#)

**Comp Time Balance Summary** ?

Compensatory Time Off Plan	COMP_LEAVE	Expiration Period	Years
Date	05/18/2020	Period Count	1
Balance at Start of Day	24.00		

\*Show Time Expiring in

**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 balances before taking action. 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.

- Absences, with the exception of Compensatory and Overtime Leave, 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)



# Review Absence Balances

**Navigation:** Navigator > Global Payroll and Absence Mgmt > Payee Data > Maintain Absences > Review Absence Balances

1. Enter **Search Criteria** information for the applicable employee. It is recommended to use the Employee ID as it is a unique identifier for each employee.
2. Click the **Search** button.
3. If more than one employee displays in the search results based on your search criteria, select the applicable employee by clicking the corresponding **Empl ID** link. If there is only one employee that meets the search criteria, the **Review Absence Balances** page displays.

### Review Absence Balances

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID	begins with	<input type="text"/>
Empl Record	=	<input type="text"/>
Name	begins with	<input type="text"/>
Last Name	begins with	<input type="text"/>
Second Last Name	begins with	<input type="text"/>
Alternate Character Name	begins with	<input type="text"/>
Middle Name	begins with	<input type="text"/>

Case Sensitive

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)



# Review Absence Balances (continued)

The **Review Absence Balances** page contains two tabs:

- **Current Balance**
- **Forecast Balance**

The default tab is **Current Balance**. This tab displays the year-to-date absence balances for each absence type.

These balances are from the most recent closed pay period and do not reflect accruals earned or hours taken after the pay period end date.

Current Balance

Forecast Balance

Employee ID     Empl Record    0    Name

**Absence Entitlement Current Balance**

1-10 of 28    [View All](#)

Accumulator Balance

User Keys

||▶

Accumulator Period	Entitlement Element▼	Element Name↕	Amount	From	Through
Year to Date	VAC ENT ELEM	VAC ENT ELEM_BAL	32.400000	01/10/2019	01/09/2020
Year to Date	SRL ENT ELEM	SRL ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	SDP ENT ELEM	SDP ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	SCK ENT ELEM	SCK ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	PLL ENT ELEM	PLL ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	PHE ENT ELEM	PHE ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	PER ENT ELEM	PER ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	PD2 ENT ELEM	PD2 ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	PD1 ENT ELEM	PD1 ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020
Year to Date	PAR ENT ELEM	PAR ENT ELEM_BAL	0.000000	01/10/2019	01/09/2020

Return to Search

Notify

Refresh



# Review Absence Balances – Forecast Balance

The **Forecast Balance** tab allows you to forecast a specific absence type for the employee as of a past or future date. Follow the steps below to review the forecast for a specific absence type:

1. In the **Absence Take Element** field, select the type of absence being forecasted using the **Look Up** icon
2. In the **As Of Date** field, enter the date for which you want to forecast the balance
3. Click the **Forecast** button
4. Review the leave balance, in hours, for the leave type and date selected

[Current Balance](#) **Forecast Balance**

Employee ID  Empl Record 0 Name

Absence Take Element

As Of Date

### Forecast Balance Results Detail

1-1 of 1  | [View All](#)

**Forecast Results** [Accumulator Results](#) [User Keys](#)

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
VAC TAKE ELEM	VAC ENT ELEM_BAL	Accumulatr	98.400000		

[Current Balance](#) | [Forecast Balance](#)



# Viewing Absence Balances on the Employee Timesheet

Absence balances can also be viewed on the employee Timesheet using the **Absence** tab. Navigate to the Timesheet using the following path:

## Team Time Tile > Timesheet

The **Timesheet Summary** page displays.

1. Enter the **Employee Selection Criteria** in the corresponding fields.

**Note:** Using very specific or combinations of Employee Selection Criteria values gives you quicker results and reduces the possibility of system overload and timing out.

2. Click the **Get Employees** button.
3. Click the **Last Name** link for the applicable employee within the search results at the bottom of the page.

The screenshot shows the 'Timesheet Summary' page. On the left is a navigation menu with 'Timesheet' selected. The main area is titled 'Report Time Timesheet Summary'. Under 'Employee Selection', there is a table for 'Employee Selection Criteria' with columns for 'Selection Criterion' and 'Selection Criterion Value'. The 'Employee ID' field is highlighted with a red box. To the right of the table are three buttons: 'Get Employees' (highlighted with a red box), 'Clear Criteria', and 'Save Criteria'.

The screenshot shows the search results table. At the top, there are controls for 'View By' (Week), 'Date' (06/16/2020), and 'Show Schedule Information' (checked). Below this, it says 'Employees For [ ] Totals From 06/15/2020 - 06/21/2020'. There are tabs for 'Time Summary' and 'Demographics'. The table has the following columns: Last Name, First Name, Employee ID, Empl Record, Reported Hours, Hours to be Approved, Scheduled Hours, Exception, Reported Absence, Hours Approved or Submitted, and Denied Hours. The 'Last Name' column is highlighted with a red box.

Last Name	First Name	Employee ID	Empl Record	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
[ ]	[ ]	[ ]	0	0.00	0.00	40.00			0.00	0.00



# Viewing Absence Balances on the Employee Timesheet (continued)

The **Timesheet** page displays.

4. Click the **Absence** tab.

The **Absence Events** tab displays. The absence balances display for the employee under the **Absence Entitlement Balances** section of the page.

These balances are from the most recent closed pay period and do not reflect accruals earned or hours taken after the pay period end date.

The screenshot shows the 'Absence' tab selected in the top navigation bar. Below it, the 'Absence Events' section is visible, containing an 'Absence Take' button and a table with columns for Select, Start Date, End Date, Absence Name, Reason, Unit Type, Details, and Status. Below the table is an 'Add Absence Event' button. The 'Approval' section contains 'Select All', 'Deselect All', 'Approve', and 'Deny' buttons. The 'Absence Entitlement Balances' section is highlighted with a red box and contains a table with columns for Entitlement Name, Balance as of 01/09/2020\*\*, From, To, and Accrual Period. The table lists various leave types and their current balances.

Entitlement Name	Balance as of 01/09/2020**	From	To	Accrual Period
Service Recognition Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Other Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Parental Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Family Medical Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
VSDP Sick Leave	26.00 Hours	01/10/2019	01/09/2020	Year to Date
Sick Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date
Emergency Layoff Leave	0.00 Hours	01/10/2019	01/09/2020	Year to Date



# Viewing Compensatory and Overtime Leave Balances

Absence Management Administrators can view and make adjustments, if necessary, to compensatory and overtime leave from the employee's Timesheet.

Navigate to the employee Timesheet using the following path:

## Team Time Tile > Timesheet

The **Timesheet Summary** page displays.

1. Enter the **Employee Selection Criteria** in the corresponding fields.

**Note:** Using very specific or combinations of **Employee Selection Criteria** values gives you quicker results and reduces the possibility of system overload and timing out.

2. Click the **Get Employees** button.
3. Click the **Last Name** link for the applicable employee within the search results at the bottom of the page.

The screenshot shows the 'Timesheet Summary' page. On the left is a navigation menu with 'Timesheet' selected. The main area is titled 'Report Time Timesheet Summary'. Under 'Employee Selection', there is a table with search criteria. The 'Employee ID' field is highlighted with a red box. To the right of this table are three buttons: 'Get Employees' (highlighted with a red box), 'Clear Criteria', and 'Save Criteria'. Below this is a 'Change View' section with a 'View By' dropdown set to 'Week', a date field for '06/16/2020', and 'Show Schedule Information' checked. Below that, it says 'Employees For [redacted] Totals From 06/15/2020 - 06/21/2020'. There are tabs for 'Time Summary' and 'Demographics'. At the bottom is a table with the following columns: Last Name, First Name, Employee ID, Empl Record, Reported Hours, Hours to be Approved, Scheduled Hours, Exception, Reported Absence, Hours Approved or Submitted, and Denied Hours. The first row of data has a red box around the 'Last Name' cell.

Last Name	First Name	Employee ID	Empl Record	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
[redacted]			0	0.00	0.00	0.00			0.00	0.00



# Viewing Compensatory and Overtime Leave Balances (continued)

The **Timesheet** page displays. The **Leave/Compensatory Time** tab is only available for employees who are eligible for compensatory, or overtime leave and is only visible if the employee has a balance or had a balance previously.

4. Click the **Leave/Compensatory Time** tab to view the available balances.

**Timesheet**

Employee ID [Redacted]  
Empl Record 0  
Time Reporting Type Positive  
Earliest Change Date 11/11/2019

Security Officer III  
Actions -

Select Another Timesheet

\*View By Week [Previous Week](#) [Next Week](#)  
\*Date 06/15/2020   
Reported Hours 0.00

From Monday 06/15/2020 to Sunday 06/21/2020 ?

Mon 6/15	Tue 6/16	Wed 6/17	Thu 6/18	Fri 6/19	Sat 6/20	Sun 6/21	Total	Time Reporting Code
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		<input type="text"/>

Reported Time Status



# Viewing Compensatory and Overtime Leave Balances (continued)

The **Leave/Compensatory Time** tab displays in the bottom portion of the page.

5. Click the corresponding **Comp\_Leave** link in the **Plan** column to view more details about the comp or overtime leave.

Save for Later   Submit   Apply Schedule

Reported Time Status   Summary   **Leave / Compensatory Time**   Absence   Exceptions

### Leave and Compensatory Time Balances ?

1-1 of 1

Plan Type	Plan	Recorded Balance	Minimum Allowed	Maximum Allowed	View Detail
Comp Time	<b>COMP_LEAVE</b>	16.00	0	120	

[Return to Select Employee](#)  
[Approve Absence](#)  
[Manager Self Service](#)  
[Time Management](#)



# Viewing Compensatory and Overtime Leave Balances (continued)

The **Compensatory Time** page displays and provides more information about the balance and, if applicable, expiration information.

- 6. Review the balance and expiration information as needed.

**Compensatory Time**

Employee ID [Redacted]

Security Officer III      Employment Record 0

[Actions](#) ▾

**Comp Time Balance Summary** <sup>?</sup>

Compensatory Time Off Plan	COMP_LEAVE	Expiration Period	Years
Date	06/15/2020	Period Count	1
Balance at Start of Day	16.00		

\*Show Time Expiring in  ▾

**Expiring Time Earned** <sup>?</sup>

Expiration Date	Quantity	Ending Balance
	0.00	0.00

[Return to Timesheet](#)  
[Manager Self Service](#)  
[Time Management](#)

[Return to Timesheet](#)



# Viewing Compensatory and Overtime Leave Balances (continued)

Navigate directly to the **Leave Balances** page to view balances using the following path:

## Team Time Tile > Leave Balances

The **Leave Balances** page displays.

1. Click the **Filter** button to access information for a specific employee.

The **Filters** pop-up window displays.

2. Enter criteria to select the employee you want to access.

**Note:** Using very specific or combinations of **Employee Selection Criteria** values gives you quicker results and reduces the possibility of system overload and timing out.

3. Click the **Done** button.



# Viewing Compensatory and Overtime Leave Balances (continued)

The **Leave Balances** page displays.

4. Click the **Select Employee** checkbox for the applicable employee.

**Leave Balances**

Select Employee 1 row

Security Officer III

Name/Title	Exceptions	Hours to be Approved
<input type="checkbox"/> Security Officer III		

The **Leave Balances Summary (In Hours)** displays. You can only view balances on this page. You cannot make entries or adjustments on this page.

5. Review the balance information as needed.
6. To see more details about the leave, click anywhere on the applicable **Leave Type** row.

**Leave Balances**

Security Officer III ✔

Security Officer III

[Return to Select Employee](#)

**Leave Balances Summary (In Hours)**

Leave Type	Balance	Maximum Balance
COMP_LEAVE	16.00	120 >



# Viewing Compensatory and Overtime Leave Balances (continued)

The **Leave Balance Details** section displays in the bottom portion of the page.

7. Review the following detailed leave balance information as needed:
  - a. **Accrual Date**
  - b. **Earned**
  - c. **Taken**
  - d. **Balance**

<b>Leave Balance Details</b>			
<b>Accrual Date</b>	<b>Earned</b>	<b>Taken</b>	<b>Balance</b>
10/26/2019	0.00	8.00	56.00
10/14/2019	8.00	0.00	64.00
09/28/2019	0.00	8.00	56.00
09/02/2019	8.00	0.00	64.00
08/29/2019	0.00	8.00	56.00
05/27/2019	8.00	0.00	64.00
05/17/2019	0.00	8.00	56.00
02/18/2019	8.00	0.00	64.00
02/14/2019	0.00	8.00	56.00

*Balances are as of the specified Accrual Date.*



# Absence Event Page

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.

## 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.

For further information about the Absence Event page, see the Job Aid titled **TA372 Interface Administration**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Absence Event Search Page

**Navigation:** Navigator > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

The **Absence Event** page displays.

1. Enter the **Search Criteria** in the corresponding field(s).

**Note:** Using very specific or combinations of **Search Criteria** values gives you quicker results and reduces the possibility of system overload and timing out.

2. Click the **Search** button.
3. If multiple search results display, click the applicable **Empl ID** link of the employee to access the **Absence Event** page.

### Absence Event

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

**Empl ID** begins with ▼

**Empl Record** = ▼

**Name** begins with ▼

**Last Name** begins with ▼


**Second Last Name** begins with ▼

**Alternate Character Name** begins with ▼

**Middle Name** begins with ▼

**Case Sensitive**

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)



# Absence Event Page (Tabs)

The **Absence Event** page displays.

There are two tabs located at the top of the page:

- **Absence Event Entry** - Displays all absence requests and events that have been entered for the employee. This is the default tab for this page
- **Forecast Messages** - Displays messages related to extended leave

Absence Event Entry | Forecast Messages

Employee ID  Empl Record 0 Name

From 03/18/2020  Through 09/14/2020

**Absence Events** ?

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status		
VAC TAKE ELEM <input type="text"/>	Vacation	08/12/2020 <input type="text"/>	08/12/2020 <input type="text"/>	<input type="text"/>	Normal <input checked="" type="checkbox"/>	<input type="checkbox"/>	06/12/2020 <input type="text"/>	<a href="#">Details</a>	Manager Timesheet	Submitted	<input type="button" value="+"/>	<input type="button" value="-"/>

Absence Event Entry | [Forecast Messages](#)



# Absence Event Page (Header)

The Header on the **Absence Event Entry** tab includes **Employee ID** (number), **Empl Record**, and **Name**.

The **From** and **Through** fields identify the date range of data displayed in the **Absence Events** section. Click the **Refresh** button after updating the **From** or **Through** date to refresh the data displayed.

The screenshot shows the 'Absence Event Entry' tab interface. At the top right, there are links for 'New Window', 'Help', and 'Personalize Page'. Below the tab name, there are two sub-tabs: 'Absence Event Entry' (active) and 'Forecast Messages'. The header section contains fields for 'Employee ID', 'Empl Record' (value: 0), and 'Name'. Below these are 'From' and 'Through' date pickers with calendar icons, and a 'Refresh' button. A 'Forecast' button is also present. The 'Absence Events' section has a search icon and a 'View All' link. Below this is a filter bar with 'Absence Take', 'Process Status', and 'Forecast Value' buttons. The main table has the following columns: \*Absence Take, Description, \*Begin Date, End Date, Partial Hours, \*Process Action, Voided, Original Begin Date, Details, Entry Source, and Workflow Status. A single row is visible with the following data: VAC TAKE ELEM, Vacation, 06/12/2020, 06/12/2020, (empty), Normal, (checkbox), 06/12/2020, Details, Manager Timesheet, Submitted. At the bottom of the table are 'Save', 'Return to Search', 'Notify', and 'Refresh' buttons. The footer shows 'Absence Event Entry | Forecast Messages'.

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	06/12/2020	06/12/2020		Normal	<input type="checkbox"/>	06/12/2020	Details	Manager Timesheet	Submitted



# Absence Event Page (continued)

Use the **Forecast** button after an absence event is added or modified in order to ensure that the employee is eligible for the absence type selected and has sufficient balances available for use. This button must be clicked whenever you enter a leave type that requires forecasting.

Click the **View All** link if there are more than ten absences.

[New Window](#) | [Help](#) | [Personalize Page](#)

Absence Event Entry | Forecast Messages

Employee ID  Empl Record 0 Name

From 03/18/2020  Through 09/14/2020

Absence Events <sup>?</sup>

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status		
VAC TAKE ELEM <input type="text"/>	Vacation	08/12/2020 <input type="text"/>	08/12/2020 <input type="text"/>	<input type="text"/>	Normal <input checked="" type="checkbox"/>	<input type="checkbox"/>	08/12/2020 <input type="text"/>	<a href="#">Details</a>	Manager Timesheet	Submitted	<input type="button" value="+"/>	<input type="button" value="-"/>

Absence Event Entry | [Forecast Messages](#)

1-1 of 1



# Absence Events Section

The **Absence Events** section displays all absence requests and events entered in Cardinal for the employee, regardless of the entry source or workflow status. There are three tabs in this section:

- **Absence Take** – Displays details about the absence take (e.g., absence, begin and end date, entry source)
- **Process Status** – Displays the status of the absence event as it relates to processing
- **Forecast Value** – After you forecast leave, click this tab to review the results as to whether an employee is eligible or not

[New Window](#) | [Help](#) | [Personalize Page](#)

**Absence Event Entry** | [Forecast Messages](#)

Employee ID  Empl Record 0 Name

From  Through

**Absence Events** ?

1-1 of 1 | [View All](#)

**Absence Take** | [Process Status](#) | [Forecast Value](#) ||>

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status		
VAC TAKE ELEM <input type="text" value="Q"/>	Vacation	<input type="text" value="08/12/2020"/>	<input type="text" value="08/12/2020"/>	<input type="text"/>	Normal <input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="06/12/2020"/>	<a href="#">Details</a>	Manager Timesheet	Submitted	<input type="button" value="+"/>	<input type="button" value="-"/>

[Absence Event Entry](#) | [Forecast Messages](#)



# Absence Take Tab

The **Absence Take** tab includes the following fields:

- **Absence Take** – Type of absence
- **Description** – Description of the specific absence type
- **Begin Date** – Start date of the absence
- **End Date** – End date of the absence

It is recommended, for reporting purposes, to enter separate requests in each pay period, instead of one, when entering a range of dates that crosses pay periods.

[New Window](#) | [Help](#) | [Personalize Page](#)

Absence Event Entry
Forecast Messages

Employee ID   
 From

Empl Record 0  
 Through

Name

**Absence Events** ?

1-1 of 1
View All

Absence Take
Process Status
Forecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	08/12/2020	08/12/2020		Normal <input checked="" type="checkbox"/>	<input type="checkbox"/>	06/12/2020	<a href="#">Details</a>	Manager Timesheet	Submitted

Absence Event Entry | [Forecast Messages](#)



# Absence Take Tab (continued)

Absence Event tab fields continued:

- **Partial Hours** - When applicable, this field displays the number of partial hours entered on the **Absence Event Input Detail** page for the absence event
- **Process Action** - The options are “**Normal**” and “**Void**”. Void is used when voiding a processed absence event
- **Voided** - Displays a checkmark when the absence event was voided by an Absence Management Administrator after the Calculate Absence and Payroll process has been run
- **Original Begin Date** - This date should always be the same as the absence event’s begin date and will default when the **Begin Date** field is initially populated for the absence event

Employee ID  Empl Record 0 Name   
 From 03/18/2020 Through 09/14/2020 Refresh Forecast

Absence Events ?

Absence Take Process Status Forecast Value

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
VAC TAKE ELEM	Vacation	08/12/2020	08/12/2020	<input type="text"/>	Normal <input checked="" type="checkbox"/>	<input type="checkbox"/>	06/12/2020	Details	Manager Timesheet	Submitted

Save Return to Search Notify Refresh

Absence Event Entry | Forecast Messages



# Absence Take Tab (continued)

Absence Event tab fields continued:

- **Details** - Provides a link to the **Absence Event Input Detail** page where you can view additional details about an existing absence event or to enter details about a new absence event
- **Entry Source** - The last source of entry or modification for the absence event (e.g., Employee Timesheet, Manager Timesheet, etc.) for Interface will say **“TA758 Absence Upload”**
- **Workflow Status** - The current status of the absence event (e.g., **“Saved”**, **“Submitted”**, **“Approved”**, **“Cancelled”**, or **“Voided”**)
- **[+]** - Add a New Row icon
- **[-]** - Delete Row icon

[New Window](#) | [Help](#) | [Personalize Page](#) |

Absence Event Entry

Forecast Messages

Employee ID  Empl Record 0 Name

From  Through

**Absence Events** ?

1-3 of 3

Absence Take

Process Status

Forecast Value

||▶

*Absence Take*	Description	*Begin Date*	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status		
<input type="text" value="MLD TAKE ELEM"/> <input type="button" value="Q"/>	Military Leave Disaster	<input type="text" value="12/19/2019"/>	<input type="text" value="12/19/2019"/>	<input type="text"/>	Normal <input type="button" value="v"/>	<input type="checkbox"/>	<input type="text" value="12/19/2019"/>	<a href="#">Details</a>	Administrator Absence Event	Approved	<input type="button" value="+"/>	<input type="button" value="-"/>
<input type="text" value="BMO TAKE ELEM"/> <input type="button" value="Q"/>	Bone Marrow/Organ Donations	<input type="text" value="12/18/2019"/>	<input type="text" value="12/18/2019"/>	2.00	Normal <input type="button" value="v"/>	<input type="checkbox"/>	<input type="text" value="12/18/2019"/>	<a href="#">Details</a>	TA758 Absence Upload	Approved	<input type="button" value="+"/>	
<input type="text" value="WCI TAKE ELEM"/> <input type="button" value="Q"/>	Worker's Comp (Day of Injury)	<input type="text" value="12/16/2019"/>	<input type="text" value="12/16/2019"/>	2.00	Normal <input type="button" value="v"/>	<input type="checkbox"/>	<input type="text" value="12/16/2019"/>	<a href="#">Details</a>	TA758 Absence Upload	Approved	<input type="button" value="+"/>	

Save

Return to Search

Notify

Refresh

Absence Event Entry | [Forecast Messages](#)



# Process Status Tab

The **Process Status** tab displays the status of the absence event as it relates to processing.

The **Status** field value of “**Finalized**” changes to “**Not Processed**” when an absence event from a prior pay period is modified in the current pay period. Valid Status values are:

- **Not Processed** – newly entered absence or absence from prior or current period that was modified and not yet processed
- **Processed** – absence was processed during the current calendar processing
- **Finalized** – absence was processed in a prior period and is not currently up for processing

The screenshot displays the 'Process Status' tab interface. At the top, there are two tabs: 'Absence Event Entry' (active) and 'Forecast Messages'. Below the tabs, there are search filters for 'Employee ID', 'Empl Record' (value: 0), and 'Name'. There are also date range filters for 'From' (03/18/2020) and 'Through' (08/14/2020), along with 'Refresh' and 'Forecast' buttons.

The main section is titled 'Absence Events' and contains a table with the following columns: \*Absence Take, Description, \*Begin Date, End Date, Status, Calendar Group ID, and Process Date. The table contains one row with the following data:

*Absence Take	Description	*Begin Date	End Date	Status	Calendar Group ID	Process Date
VAC TAKE ELEM	Vacation	08/12/2020	08/12/2020	Not Processed		

At the bottom of the interface, there are buttons for 'Save', 'Return to Search', 'Notify', and 'Refresh'. The 'Process Status' tab and the 'Not Processed' status in the table are highlighted with red boxes.



# Forecast Value Tab

The **Forecast Value** tab identifies in the **Forecast Value** field whether the employee is “**Eligible**” or “**Ineligible**” for the absence event(s). This tab should be reviewed after entering an absence event for the employee and clicking the **Forecast** button.

Additional information can be reviewed by clicking the **Forecast Details** link.

**Absence Event Entry** | Forecast Messages

Employee ID [ ] Empl Record 0 Name [ ]  
From 03/18/2020 [ ] Through 09/14/2020 [ ] Refresh Forecast

**Absence Events** ?

Filter: Absence Take | Process Status | **Forecast Value** ||

*Absence Take	Description	*Begin Date	End Date	Forecast Value	Forecast Date Time	Forecast Details		
VAC TAKE ELEM [ ]	Vacation	06/12/2020 [ ]	06/12/2020 [ ]	ELIGIBLE	06/16/2020 12:06PM	<a href="#">Forecast Details</a>	+	-

Save | Return to Search | Notify | Refresh

Absence Event Entry | [Forecast Messages](#)



# Absence Forecast Results Page

The **Absence Forecast Results** page displays in a pop-up window. The expected remaining balance, paid hours, and unpaid hours display for the corresponding absence event. This page is especially helpful if the forecast value is “**Ineligible**” as it shows how many hours, if any, are eligible and how many are not.

In this example, the employee is eligible to be paid for the full vacation absence of 8 hours. **VAC FORECAST PAID** shows 8 hours will be paid, **VAC FORECAST UNPD** shows 0 hours will be unpaid, and the remaining VACATION balance on that day is expected to be **184** hours (**VAC ENT ELEM\_BAL**) after the 8-hour take is deducted.

**Absence Forecast Results**

Absence Event

**Absence Forecast Results**

Absence Take Element: VAC TAKE ELEM  
Absence Type: Vacation  
Forecast Value: **ELIGIBLE**

Begin Date: 06/12/2020  
End Date: 06/12/2020  
Forecast Date Time: 06/16/2020 12:08PM

**Absence Forecast Result Details**

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
VAC TAKE ELEM	VAC ENT ELEM_BAL	Accumulatr	184.000000		
VAC TAKE ELEM	VAC FORECAST PAID	Accumulatr	8.000000		
VAC TAKE ELEM	VAC FORECAST UNPD	Accumulatr	0.000000		

Return



# Insufficient Balance vs Forecast Error

If the **Forecast Value** indicates it is “**Ineligible**” due to an insufficient balance and the employee does not agree, be sure to investigate it. You may need to make a balance adjustment due to an error. Any hours not covered by the balance are processed as **LNP** (Pay Dock) if the absence event is processed.

### Absence Forecast Results

[Help](#)

Absence Event

#### Absence Forecast Results

Absence Take Element CSL TAKE ELEM      Begin Date 06/22/2020  
Absence Type Vol Srv Lv      End Date 06/26/2020  
**Forecast Value INELIGIBLE**      Forecast Date Time 06/18/2020 3:57PM

#### Absence Forecast Result Details

Forecast Results   Accumulator Results   User Keys 1-3   User Keys 4-6   ||>

Secondary Element	Forecast Element	Type	Numeric Value	Character Value	Date Value
CSL TAKE ELEM	CSL ENT ELEM_BAL	Accumulatr	0.000000		
CSL TAKE ELEM	CSL FORECAST PAID	Accumulatr	9.000000		
CSL TAKE ELEM	CSL FORECAST UNPD	Accumulatr	31.000000		

[Return](#)



# Entering/Modifying Compensatory and Overtime Leave on the Timesheet

Make an entry/adjustment to compensatory or overtime leave, on behalf of an employee, from the employee's Timesheet.

Navigate to the **Timesheet Summary** page using the following path:

**Team Time Tile > Timesheet**

The **Timesheet Summary** page displays.

1. Enter the **Employee Selection Criteria** in the corresponding fields.

**Note:** Using very specific or combinations of **Employee Selection Criteria** values gives you quicker results and reduces the possibility of system overload and timing out.

2. Click the **Get Employees** button.
3. Within the search results at the bottom of the page, click the **Last Name** link for the applicable employee.

Report Time  
Timesheet Summary

Employee Selection

Employee Selection Criteria

Selection Criterion	Selection Criterion Value
Time Reporter Group	<input type="text"/>
Employee ID	<input type="text"/>
Last Name	<input type="text"/>
First Name	<input type="text"/>
Business Unit	<input type="text"/>
Job Code	<input type="text"/>
Department	<input type="text"/>
Reports To Position Number	<input type="text"/>
Location Code	<input type="text"/>
Workgroup	<input type="text"/>
Position Number	<input type="text"/>

Get Employees  
Clear Criteria  
Save Criteria

Change View

\*View By: Week  Show Schedule Information

Date: 06/16/2020

Employees For [ ] Totals From 06/15/2020 - 06/21/2020

Time Summary | Demographics

Last Name	First Name	Employee ID	Empl Record	Reported Hours	Hours to be Approved	Scheduled Hours	Exception	Reported Absence	Hours Approved or Submitted	Denied Hours
[ ]	[ ]	[ ]	0	0.00	0.00	0.00			0.00	0.00



# Entering/Modifying Compensatory and Overtime Leave on the Timesheet (continued)

The **Timesheet** displays.

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

**Timesheet**

Employee ID [Redacted]  
 Empl Record 0  
 Time Reporting Type Positive  
 Earliest Change Date 11/11/2019

Security Officer III  
 Actions ▾

Select Another Timesheet

\*View By Week ▾ Previous Week Next Week  
 \*Date 06/15/2020 [Calendar Icon] [Refresh Icon]  
 Reported Hours 0.00

From Monday 06/15/2020 to Sunday 06/21/2020 ?

Mon 6/15	Tue 6/16	Wed 6/17	Thu 6/18	Fri 6/19	Sat 6/20	Sun 6/21
8	8	8	8	8		

For further information about this Entering/Modifying Comp and Overtime Leave, see the Job Aid titled **TA374 Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Retroactive Processing

Retroactive Processing key points:

- Employees, timekeepers, and supervisors enter or make adjustments up to 90 days in the future and 90 days in the past
- Absence Management Administrators can process prior period adjustments (e.g., absence entry and balance adjustments) up to one year in the past
- Absence Management Administrator can make manual balance adjustments more than a year in the past as needed



# Hands-On Exercise

Your instructor will provide detailed instructions on how to log in and complete the exercise.





# Lesson Checkpoint



1. True or False. All leave balances can be viewed on the **Review Absence Balances** page in Cardinal.



2. True or False. Absence Management Administrators can modify, delete, or void absences on the **Absence Event** page.



3. True or False. If you enter an absence on the **Absence Event** page, you do not need to forecast the absence like you do on the **Timesheet** page.



# Lesson Summary

2

## Reviewing and Entering Absence Events

In this lesson, you learned:

- How to review employee absence balances
- How to enter and modify absence requests and events



# Lesson

3

## Managing Extended Leave

This lesson covers:

- Managing Extended Leave
- 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 on 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 request 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



# Entering and Managing Extended Absences

**Navigation:** Navigator > Global Payroll & Absence Mgmt > Payee Data > Maintain Absences > Absence Event

The **Absence Event** page displays.

1. Enter the **Search Criteria** in the corresponding field(s).

**Note:** Using very specific or combinations of **Search Criteria** values gives you quicker results and reduces the possibility of system overload and timing out.

2. Click the **Search** button.
3. If multiple search results display, click the applicable **Empl ID** link of the employee to access the **Absence Event** page.

### Absence Event

Enter any information you have and click Search. Leave fields blank for a list of all values.


[Find an Existing Value](#)

▼ **Search Criteria**

<b>Empl ID</b>	begins with ▼	<input type="text"/>
<b>Empl Record</b>	= ▼	<input type="text"/>
<b>Name</b>	begins with ▼	<input type="text"/>
<b>Last Name</b>	begins with ▼	<input type="text"/>
<b>Second Last Name</b>	begins with ▼	<input type="text"/>
<b>Alternate Character Name</b>	begins with ▼	<input type="text"/>
<b>Middle Name</b>	begins with ▼	<input type="text"/>

**Case Sensitive**

Limit the number of results to (up to 300):

[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)



# Entering and Managing Extended Absences (continued)

The **Absence Event** page displays for the applicable employee.

Several specific tasks may need to be completed when entering and managing an extended absence in Cardinal. The specific tasks required vary based on the type of extended absence:

- Checking Absence Tracking Accumulators
- Entering Concurrent Absence Events
- Obtaining Approval

[New Window](#) | [Help](#) | [Personalize Page](#)

Absence Event Entry

Forecast Messages

Employee ID

Empl Record 0

Name

From

Through

**Absence Events** ?

1-1 of 1
View All

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status
FML TAKE ELEM	Family and Medical Leave	08/01/2020	08/12/2020		Normal	<input type="checkbox"/>	08/01/2020	<a href="#">Details</a>	Administrator Absence Event	Approved

Absence Event Entry
[Forecast Messages](#)



# 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

Extended absences track employee usage. WCL/WCP/WCS (Workers' Compensation Supplement) extended absences generate charge distributions to allocate salary costs.

FML is used exclusively for tracking and reporting. FML runs concurrently with other absence types and the employee's eligibility is determined outside of Cardinal.

FML does not generate earnings for payroll and distribution; therefore, you must **enter another absence take concurrent with the FML date range to generate earnings** for the employee (e.g., SCK (Traditional Sick), VAC (Vacation), CPT (Compensatory Leave Taken)). An example is shown below. If an employee has no available balances, enter LNP (Pay Docking). However, use of LNP should be avoided if possible and coordinated with the employee as needed.

Absence Event Entry | Forecast Messages

Employee ID  Empl Record 0 Name   
From 03/18/2020 Through 09/14/2020 Refresh Forecast

Absence Events ?

Sort: Absence Take | Process Status | Forecast Value

*Absence Take	Description	*Begin Date	End Date	Forecast Value	Forecast Date Time	Forecast Details		
VAC TAKE ELEM	Vacation	06/01/2020	06/12/2020	ELIGIBLE	06/16/2020 4:18PM	<a href="#">Forecast Details</a>	+	-
FML TAKE ELEM	Family and Medical Leave	06/01/2020	06/12/2020	ELIGIBLE	06/16/2020 4:18PM	<a href="#">Forecast Details</a>	+	-

Save | Return to Search | Notify | Refresh

Absence Event Entry | [Forecast Messages](#)



# Managing Concurrent Extended Absence Events

Using FML does not affect the charge distributions that allocate salary costs. The absence types used concurrently with FML create the charge distributions that allocate salary costs. However, FML and other extended leaves will be visible on the employee's Timesheet in Self Service.

In the example below, FML and VAC were entered on the **Absence Events** page. Once forecasted and approved, they display on the employee's Timesheet as depicted.

From Sunday 12/06/2020 to Saturday 12/12/2020 ?

Sun 12/6	Mon 12/7	Tue 12/8	Wed 12/9	Thu 12/10	Fri 12/11	Sat 12/12	Total	Time Reporting Code	*Task
		8.00	8.00	8.00	8.00		32.00	VAC - Vacation	24200
		8.00	8.00	8.00	8.00		32.00	FML - Family Medical Leave	24200

**Reported Time Status**

1-8 of 8

Date	Reported Status	Total	TRC	Description	Sched Hrs	Add Comments
12/08/2020	Approved	8.00	FML	Family Medical Leave	8.00	
12/08/2020	Approved	8.00	VAC	Vacation	8.00	
12/09/2020	Approved	8.00	FML	Family Medical Leave	8.00	



# Managing Concurrent Extended Absence Events (continued)

If an extended absence, (e.g., FML, STD, LTD, WCL/WCP/WCS) is used concurrently with CPT (Compensatory Leave Taken) or OTT (Overtime Leave Taken), the CPT and OTT takes must be entered on the employee's Timesheet.

From Monday 12/02/2019 to Sunday 12/08/2019 ?

Mon 12/2	Tue 12/3	Wed 12/4	Thu 12/5	Fri 12/6	Sat 12/7	Sun 12/8	Total	Time Reporting Code
8.00	8.00						16.00	FML - Family Medical Leave
<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		CCL - Compensatory Leave Taken <input type="checkbox"/>

Leave and Compensatory Time Balances ?

1-2 of 2

Plan Type	Plan	Recorded Balance	Minimum Allowed	Maximum Allowed	View Detail
Comp Time	<a href="#">COMP_LEAVE</a>	104.00	0	1000	
Comp Time	<a href="#">OT_LEAVE</a>	108.00	0	1000	

[Return to Select Employee](#)  
[Approve Absence](#)  
[Manager Self Service](#)  
[Time Management](#)



# 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**. 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**.

Absence Event Entry | Forecast Messages

Employee ID [ ] Empl Record 0 Name [ ]  
 From 12/29/2019 [ ] Through 04/04/2021 [ ] Refresh Forecast

Absence Events ?

Absence Take | Process Status | Forecast Value ||>

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source
STD TAKE ELEM [ ]	VSDP Short Term Disability	12/07/2020 [ ]	12/11/2020 [ ]	6.40	Normal [v]	<input type="checkbox"/>	12/07/2020 [ ]	<a href="#">Details</a>	Administrator Ab
VAC TAKE ELEM [ ]	Vacation	12/07/2020 [ ]	12/11/2020 [ ]	1.6	Normal [v]	<input type="checkbox"/>	[ ] [ ]	<a href="#">Details</a>	Administrator A

Save | Return to Search | Notify | Refresh



# 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**.



# Extended Absences – Entering Comments

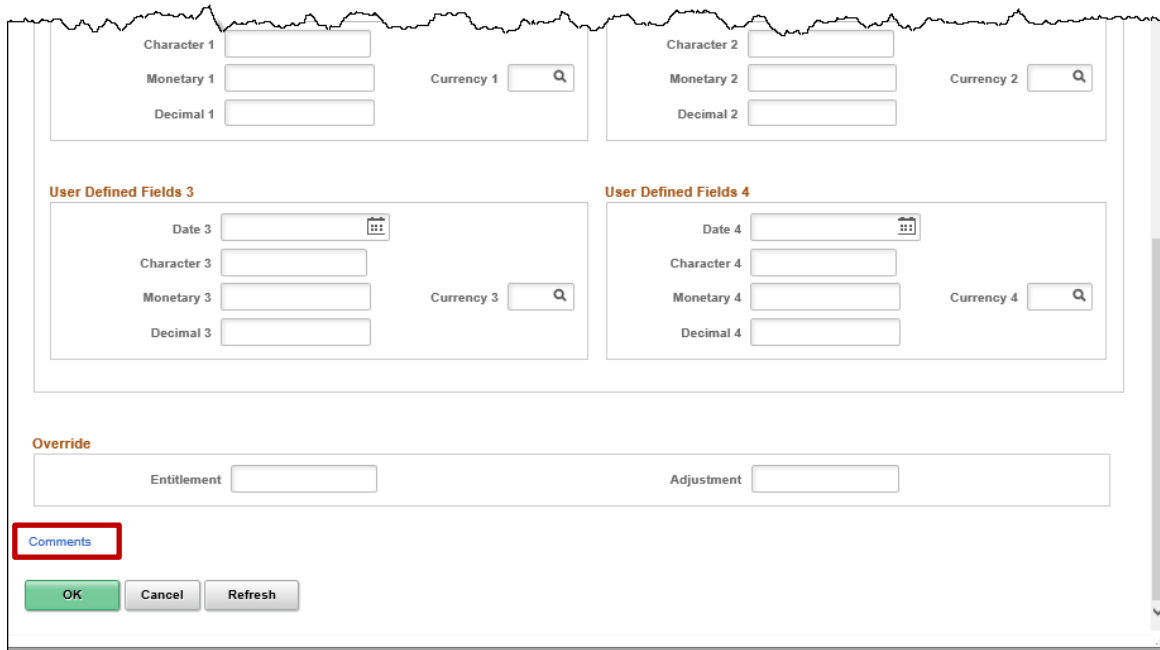
1. Click the **Details** link associated with the absence event on the **Absence Event** page.

The **Absence Event Input Detail** page displays in a pop-up window.

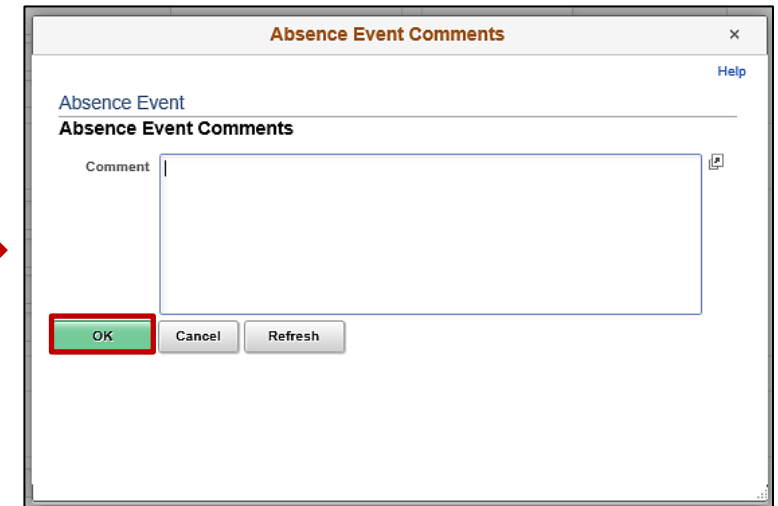
2. Click the **Comments** link near the bottom of the page.

The **Absence Events Comments** page displays in a pop-up window.

3. Enter the applicable comments and then click the **OK** button.



The screenshot shows the 'Absence Event Input Detail' page. It features two columns of input fields for 'Character 1', 'Monetary 1', 'Decimal 1', 'Currency 1', 'Character 2', 'Monetary 2', 'Decimal 2', and 'Currency 2'. Below these are two sections for 'User Defined Fields 3' and 'User Defined Fields 4', each containing 'Date', 'Character', 'Monetary', 'Decimal', and 'Currency' fields. At the bottom, there is an 'Override' section with 'Entitlement' and 'Adjustment' fields. A red box highlights the 'Comments' link at the bottom left, and another red box highlights the 'OK' button at the bottom center.



The screenshot shows the 'Absence Event Comments' pop-up window. It has a title bar with 'Absence Event Comments' and a close button. Below the title bar, there is a 'Help' link and the text 'Absence Event' and 'Absence Event Comments'. A large text area labeled 'Comment' is provided for entering text. At the bottom, there are three buttons: 'OK' (highlighted with a red box), 'Cancel', and 'Refresh'.



# Extended Absences – Approving

To approve the extended absence event, the second Absence Management Administrator navigates to the **Absence Event** page for the applicable employee.

1. Identify the appropriate extended absence request and click the **Details** link.

[New Window](#) | [Help](#) | [Personalize Page](#)

**Absence Event Entry** | [Forecast Messages](#)

Employee ID: [Redacted]    Empl Record: 0    Name: [Redacted]  
 From: 03/18/2020 [Calendar]    Through: 09/14/2020 [Calendar]    [Refresh](#)    [Forecast](#)

**Absence Events** ?

🔍 1-2 of 2 | [View All](#)

[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	Workflow Status		
VAC TAKE ELEM 🔍	Vacation	06/01/2020 [Calendar]	06/12/2020 [Calendar]		Normal <input checked="" type="checkbox"/>	<input type="checkbox"/>	06/01/2020 [Calendar]	<a href="#">Details</a>	Administrator Absence Event	Approved	<a href="#">+</a>	<a href="#">-</a>
FML TAKE ELEM 🔍	Family and Medical Leave	06/01/2020 [Calendar]	06/12/2020 [Calendar]		Normal <input checked="" type="checkbox"/>	<input type="checkbox"/>	06/01/2020 [Calendar]	<a href="#">Details</a>	Administrator Absence Event	Needs Approval	<a href="#">+</a>	<a href="#">-</a>

[Save](#) | [Return to Search](#) | [Notify](#) | [Refresh](#)

[Absence Event Entry](#) | [Forecast Messages](#)



# Extended Absences – Approving (continued)

The **Absence Event Input Details** page displays in a pop-up window.

2. Select the **Manager Approved** checkbox option.
3. Click the **OK** button at the bottom of the page.

**Absence Event Input Detail**

**Absence Event**

**Absence Event Input Detail**

Absence Take: FML TAKE ELEM  
Absence Reason: FME  
Entry Source: Administrator Absence Event  
Workflow Status: Needs Approval  
\*Process Action: Normal  
 Voided Indicator  
 **Manager Approved**

Absence Type: Family and Medical Leave Act  
Event Priority: 99  
Last Updated:  
Process Status: Not Processed  
Calendar Group ID:  
Process Date:  
First Processed Date:

**Absence Begin / End Data**

\*Begin Date: 08/01/2020  
End Date: 08/12/2020  
Original Begin Date: 08/01/2020  
Partial Days: None

**User Defined Fields**

**Override**

Entitlement:   
Adjustment:

**Comments**

**OK** Cancel Refresh



# Extended Absences – Obtaining Approval (continued)

The **Absence Event** page returns.

4. Click the **Forecast** button (even if previously forecasted upon entry).

**Absence Event Entry** | Forecast Messages

Employee ID  Empl Record 0 Name   
From 03/18/2020  Through 09/14/2020

**Absence Events** ⓘ

*Absence Take	Description	*Begin Date	End Date	Forecast Value	Forecast Date Time	Forecast Details		
VAC TAKE ELEM <input type="text"/>	Vacation	06/01/2020 <input type="text"/>	06/12/2020 <input type="text"/>	ELIGIBLE	06/16/2020 4:36PM	<a href="#">Forecast Details</a>	<input type="button" value="+"/>	<input type="button" value="-"/>
FML TAKE ELEM <input type="text"/>	Family and Medical Leave	06/01/2020 <input type="text"/>	06/12/2020 <input type="text"/>	ELIGIBLE	06/16/2020 4:36PM	<a href="#">Forecast Details</a>	<input type="button" value="+"/>	<input type="button" value="-"/>

Absence Event Entry | [Forecast Messages](#)

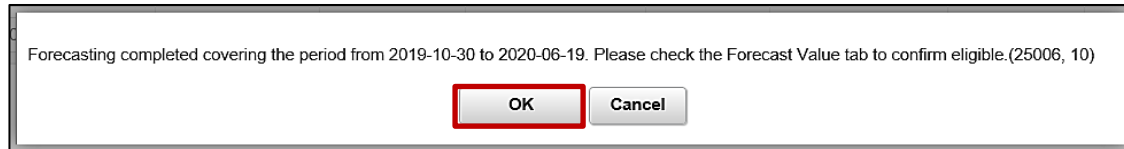


# Extended Absences – Obtaining Approval (continued)

5. Once the forecasting completes, a confirmation message displays in a pop-up window. Click the **OK** button.

The **Workflow Status** field updates to “Approved”.

6. Click the **Save** button.



New Window | Help | Personalize Page |

Absence Event Entry | Forecast Messages

Employee ID  Empl Record 0 Name

From 03/18/2020 Through 09/14/2020 Refresh Forecast

Absence Events ?

Q 1-2 of 2 View All

*Absence Take	Description	*Begin Date	End Date	Partial Hours	*Process Action	Voided	Original Begin Date	Details	Entry Source	Workflow Status		
VAC TAKE ELEM	Vacation	06/01/2020	06/12/2020		Normal	<input type="checkbox"/>	06/01/2020	Details	Administrator Absence Event	Approved	+	-
FML TAKE ELEM	Family and Medical Leave	06/01/2020	06/12/2020		Normal	<input type="checkbox"/>	06/01/2020	Details	Administrator Absence Event	Approved	+	-

Save Return to Search Notify Refresh

Absence Event Entry | Forecast Messages



# Hands-On Exercise

Your instructor will provide detailed instructions on how to log in and complete the exercise.





# Lesson Checkpoint



1. True or False. Absence Management Administrators are responsible for entering extended leave balances into Cardinal based on documentation received for an employee (HR and/or Payroll).



2. Which extended leave type is used only for tracking and reporting and does not impact the generated charge distributions to allocate salary costs?
  - a) FML
  - b) LTD
  - c) STD
  - d) WCL



3. True or False. While Cardinal allows the same Absence Management Administrator that enters the extended absence to approve it, it is recommended that a second Absence Management Administrator does the approval.



# Lesson Summary

3

## Managing Extended Leave

In this lesson, you learned:

- How to manage extended leave absence events



# Lesson

4

## Adjusting Absence Entitlement Balances

This lesson covers:

- Adjusting Absence Entitlement Balances
- Processing Leave Donations
- Zeroing Out Leave Balances
- Identifying Balances for Leave Payout
- Pay Docking



# Taking Action on Leave Balances

There are times you may need to take action or communicate information related to leave 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 leave 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 leave balance:

- **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 leave entry. Balance adjustments should be made before leave 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 for leave, 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 **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**.



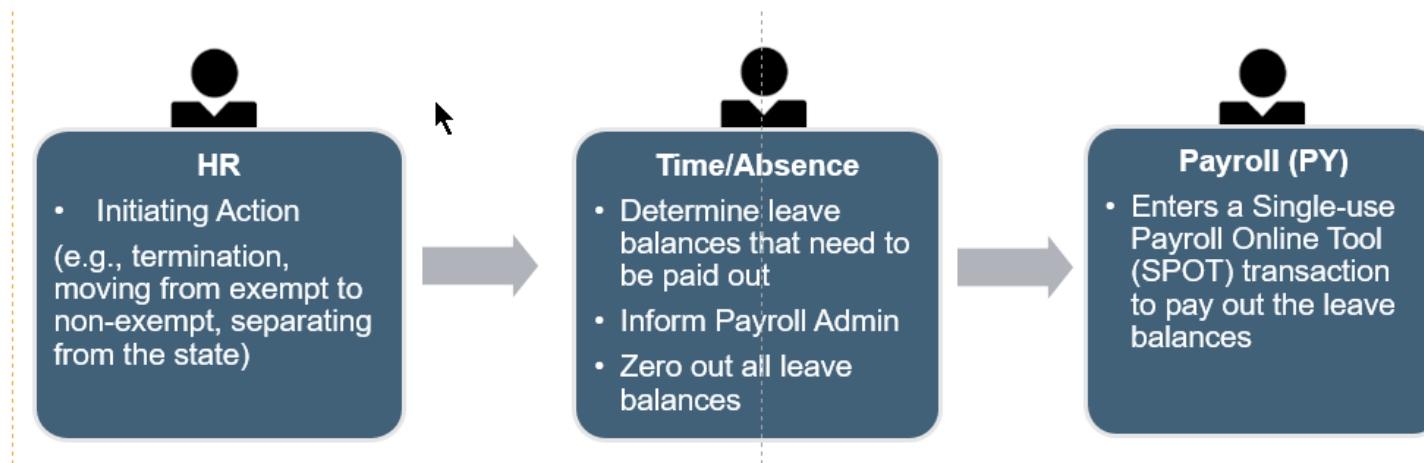
# Identifying Balances for Leave Payout

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 for leave 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, with the exception of 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 leave system of record and the current agency is using Cardinal AM, their leave balances need to be manually entered.
- Absent Management Administrators make these adjustments on the **Supporting Elements** page.
- Transferring employees can use leave from their previous agency in their first pay period.

For details on entering 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**.



# Pay Docking

As an Absence Management Administrator, an important part of your role is to prevent unanticipated pay docking. When an employee/timekeeper enters Pay Docking (LNP), it is understood that the pay docking is being requested. There may be times outside of this when an event may happen that causes unexpected pay docking (e.g., having a leave request that is initially eligible but becomes ineligible).

To help prevent unexpected pay docking, there are two key reports you can run to identify employees who are in a situation that would lead to pay docking. They are:

- Ineligible Forecasted Absence Events Report
- Docking Unpaid Absences Report

The Payroll Administrator will calculate the amount of pay to be docked. LNP needs to be entered on the Timesheet at the same time as the Pay Docking is entered into SPOT.

This amount is entered into the Single-Use Payroll Online Tool (SPOT) so that the employee is docked appropriately.



# Ineligible Forecasted Absence Events

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:

**Navigator > Reporting Tools > Query > Query Viewer > V\_TA\_ABS\_EVT\_FCST\_INELIG**

**V\_TA\_ABS\_EVT\_FCST\_INELIG - Ineligible Forecasted Absence**

Business Unit

Department ID (Blank for All)

Current Leave Yr End Date

Download results in : [Excel SpreadSheet](#) [CSV Text File](#) [XML File \(1 kb\)](#)

[View All](#) First 1-3 of 3 Last

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	



# Docking Unpaid Absences

The **Docking Unpaid Absences Report** provides a list of employees with processed unpaid absences from either Absence Management or TL Payable Time where Cardinal is the leave system of record or from TL Payable Time where Agency has an external leave system of record.

Navigate to this report using the following path: **Navigator > 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	<b>Docking Unpaid Absences</b>																		
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	TRC	DESCRIPTION	QUANTIT	STATUS	FROZEN DATE	FROZEN FLAG	FORECAST VALUE	WORKGROUP	
10																			

When using the **Docking Unpaid Absences Report**, it is recommended that the AM Administrator run the report twice to validate employees are docked appropriately.

- First time (before final pay calc)
  - Run and save the report
  - Reach out to employees as appropriate to update Timesheets
- Second time (after the Timesheet due date)
  - Run and save the report
  - Compare the two versions of the report to identify deltas
  - The Payroll Administrator will review pay dock SPOT transactions to verify employees have been paid accurately
  - If not, the Payroll Administrator will make the additional adjustments in SPOT for the next pay period



# Hands-On Exercise

Your instructor will provide detailed instructions on how to log in and complete the exercise.





# Lesson Checkpoint



1. True or False. It is important to zero out leave balances when an employee separates from the state because if the employee is rehired by the agency, those balances will remain in Cardinal and be eligible for the employee to use.



2. To help prevent unexpected \_\_\_\_\_, one option is to generate and review the Ineligible Absence Forecasted Events Report.
  - a. Leave Payout
  - b. Pay Docking
  - c. Leave Donation
  - d. Transfers



# Lesson Summary

4

## Adjusting Absence Entitlement Balances

In this lesson, you learned:

- How to adjust Absence Entitlement balances
- How to process Leave donations
- How to clear Leave balances
- How to identify balances for leave payout
- About Pay Docking and how to avoid unexpected 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

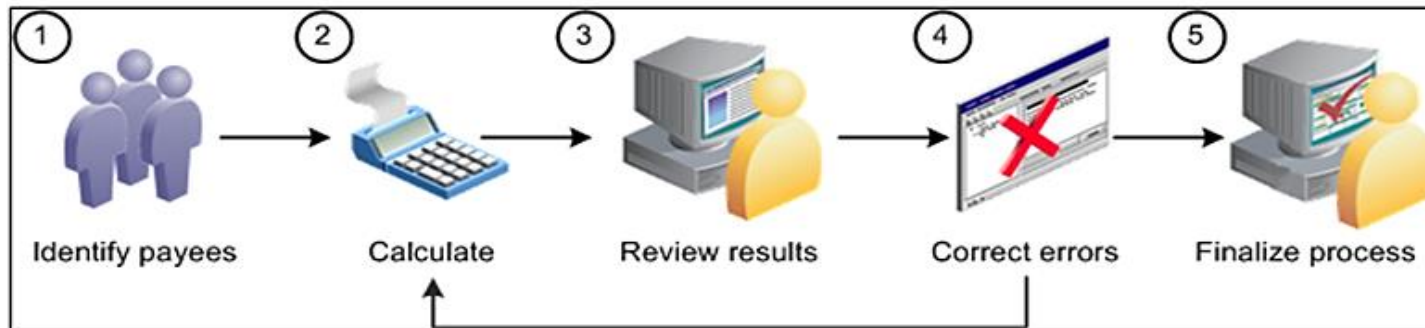
The Absence Calculation process:

- 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 Job Aid titled **Cardinal HCM Reports Catalog**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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:

**Navigator > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar**

Calendar Results
Earnings and Deductions
Accumulators
Supporting 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	<a href="#">Segment Detail</a>

**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:

**Navigator > Global Payroll & Absence Mgmt > Absence and Payroll Processing > Review Absence/Payroll Info > Results by Calendar Group**

Calendar Group Results
Earnings and Deductions
Accumulators
Supporting Elements

Employee
Empl ID
Empl Record

Calendar Group ID 2019SM124
SM1CalGroup242019
0

**Segment Information by Calendar**

☰ Q
◀ ◻ ▶
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	<a href="#">Segment Detail</a>
SM12019SM123	12/10/2019	12/24/2019	Calculate	1	2	1	<a href="#">Segment Detail</a>
SM12019SM124	12/25/2019	01/09/2020	Calculate	1	1	1	<a href="#">Segment Detail</a>

**Additional Result Pages**

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

Return to Search
Previous in List
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Notify

Calendar Group Results
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[Supporting Elements](#)



# Lesson Checkpoint



1. True or False. Self-Service users are able to see balances calculated in the current open period.



2. True or False. The Absence Calculation process processes balance adjustments made by the Absence Management Administrator.



# 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:

- About the absence reporting process
- How to maintain absences in Cardinal
- How to adjust absence entitlement balances
- About the Absence Calculation process
- How to review the Absence Calculation results information



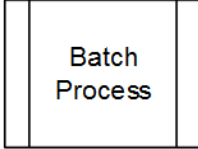
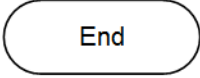
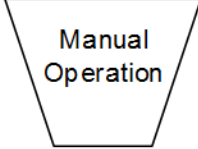
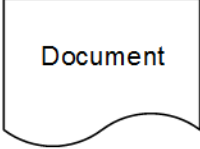
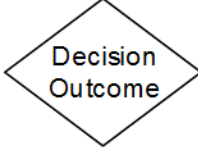
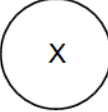
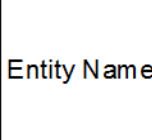
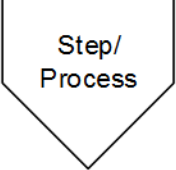


# Appendix

- Flowchart Key



# 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.