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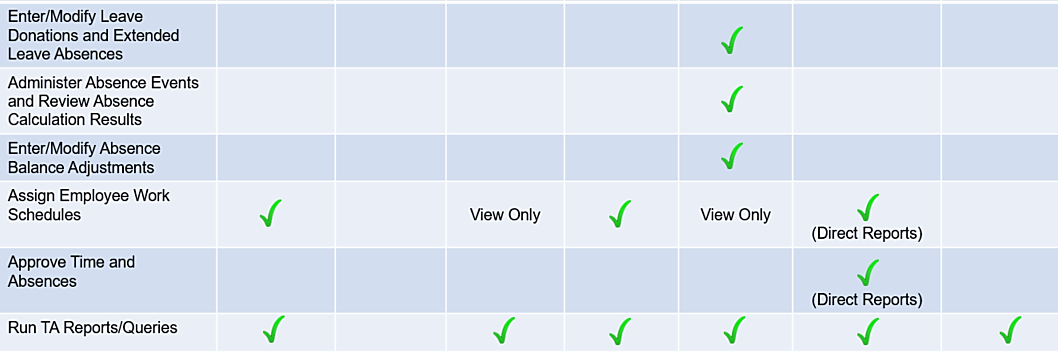
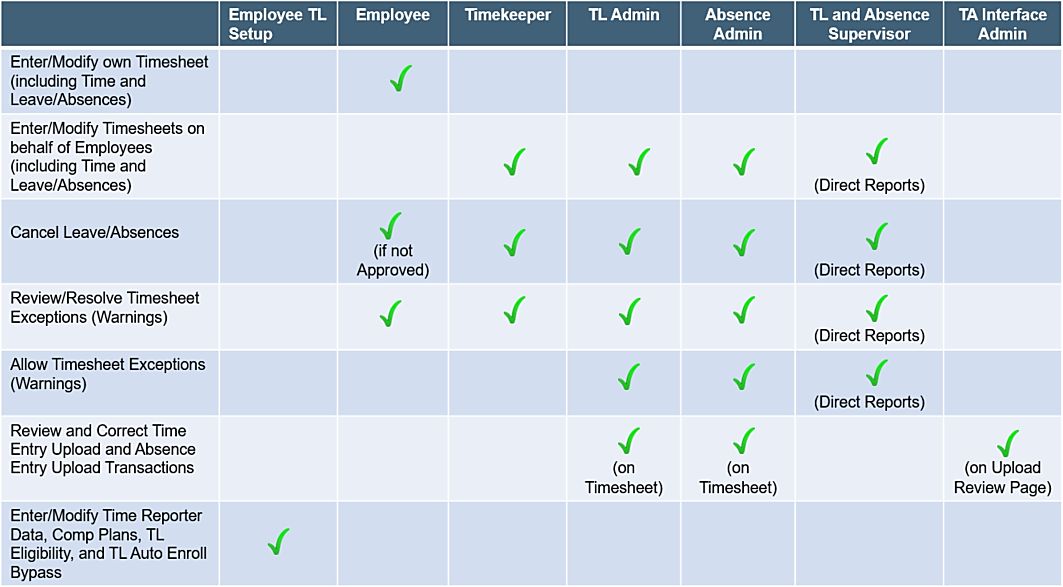
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# Time & Attendance Roles



# Time Reporter Types

## Positive Time Reporter Guidelines

**Entering Hours:**

* All hours worked must be entered on the Timesheet
* Report the actual hours worked on the day they were worked (no lump sum reporting)
* Comp and overtime leave are reported in the Timesheet grid when earned and taken

**Hourly Employees:**

* Hourly employees are always set up as Positive Time Reporters and they must enter and submit all

hours on the Timesheet

* Once approved, the Timesheet is then sent to payroll for processing and payment

**Salaried Employees:**

* Salaried employees with a Variable Work Schedule are always setup as Positive Time Reporters
* and they must enter and submit all hours on the Timesheet
* Once approved, the Timesheet is then sent to payroll for processing and payment

**Entering Overtime:**

* Enter overtime on the Timesheet on the day(s) that it occurred (no lump sum reporting)

**Timesheet Submission:**

* All productive and non-productive time must be reported
* Hourly employees must submit time in order for it to be processed by payroll
* Salaried employees must submit time for overtime and shift payments to be processed and paid,
* for the accounting distributions to be accurate, and for the absence balances to be updated in a timely manner
* The Timesheet must be submitted at a minimum once per pay period

## Exception Time Reporter Guidelines

**Work Schedule:**

* Cardinal generates the employee’s hours based on their Work Schedule

**Exceptions to the Work Schedule:**

* Must be entered on the day(s) it occurred
* If any exception is entered on a day, all time must be entered for that day

**Exception Examples:**

* Employee worked a different day or worked hours that differ from their Work Schedule
* Employee worked overtime
* Employee reports an Absence
* Employee worked their regular Work Schedule, but needs to enter ChartField details

**Timesheet Submission:**

* If any exceptions/time were entered on the Timesheet, the Timesheet must be submitted (at a

minimum once per pay period)

* If no exceptions were entered, Cardinal will generate the hours based on the employee’s Work Schedule and the Timesheet does not need to be submitted

# Work Schedules

## General Information

Work Schedules define when and how productive and non-productive time are reported on the Timesheet. For exception time reporters, Work Schedules are also used to generate payable time.

Each employee **must** have an assigned Work Schedule in Cardinal.

**Note**: Work Schedules are effective dated and required for Timesheet rule processing and for absence duration calculations for Agencies utilizing Cardinal as their Leave/Absence system of record.

Users with the following roles have the ability to assign/update an employee’s Work Schedule:

Users with the following roles have the ability to assign Work Schedules to an employee and update the Work Schedule currently assigned to an employee:

* Time & Labor (TL) Administrator
* TL Employee Setup Administrator
* The employee’s manager/supervisor (TL Supervisor)

## Types of Work Schedules

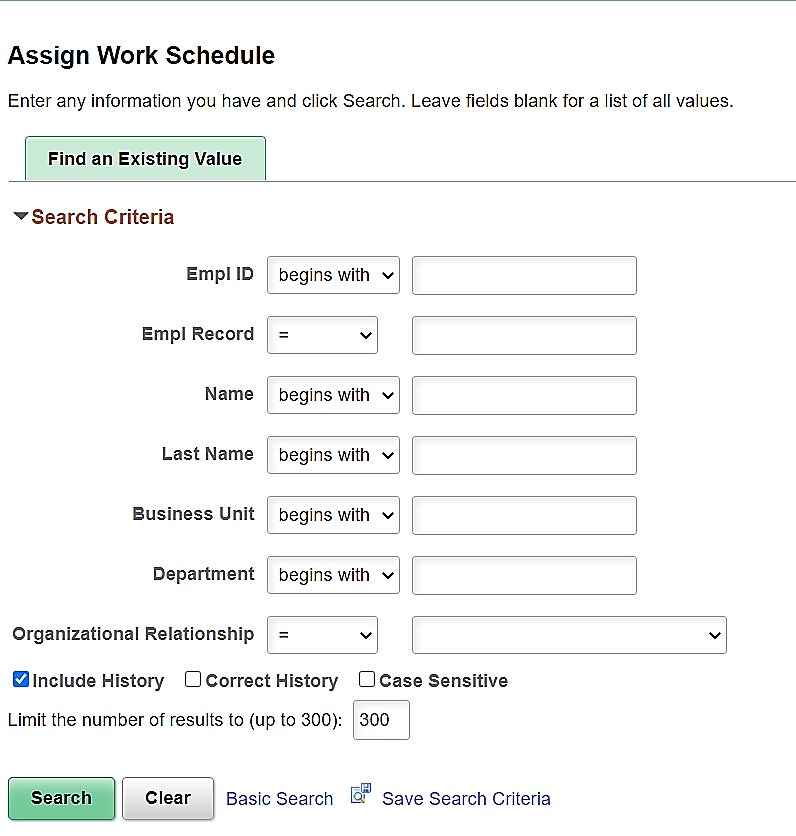
* **Hourly** **Work Schedule** – This is a Work Schedule with zero pre-defined hours and should only be assigned to hourly (wage) employees. All hourly employees must report all hours worked on their Cardinal Timesheet in order to be paid
* **Set Work Schedule** – This is a non-flexible Work Schedule with predictable days and hours and should only be assigned to salaried employees. A set Work Schedule could also include a rotating day pattern
* **Variable Work Schedule** – This is a flexible Work Schedule that is set up in the system as 24 hours a day 7 days a week and should only be assigned to salaried employees. This type of Work Schedule requires employees to report all hours on their Cardinal Timesheet

## Assigning a Work Schedule to an Employee

1. To assign a Work Schedule to an employee, access the **Assign Work Schedule** page using the following path:

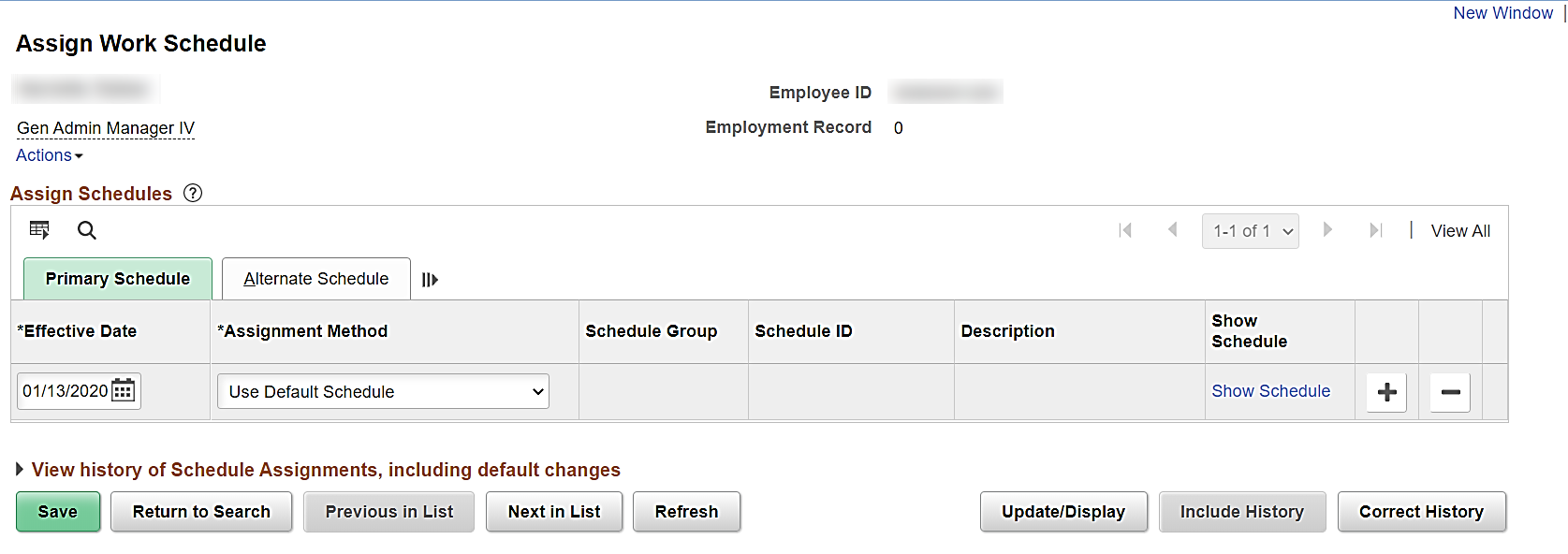
**Navigator > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedule**

The **Assign Work Schedule Search** page displays.



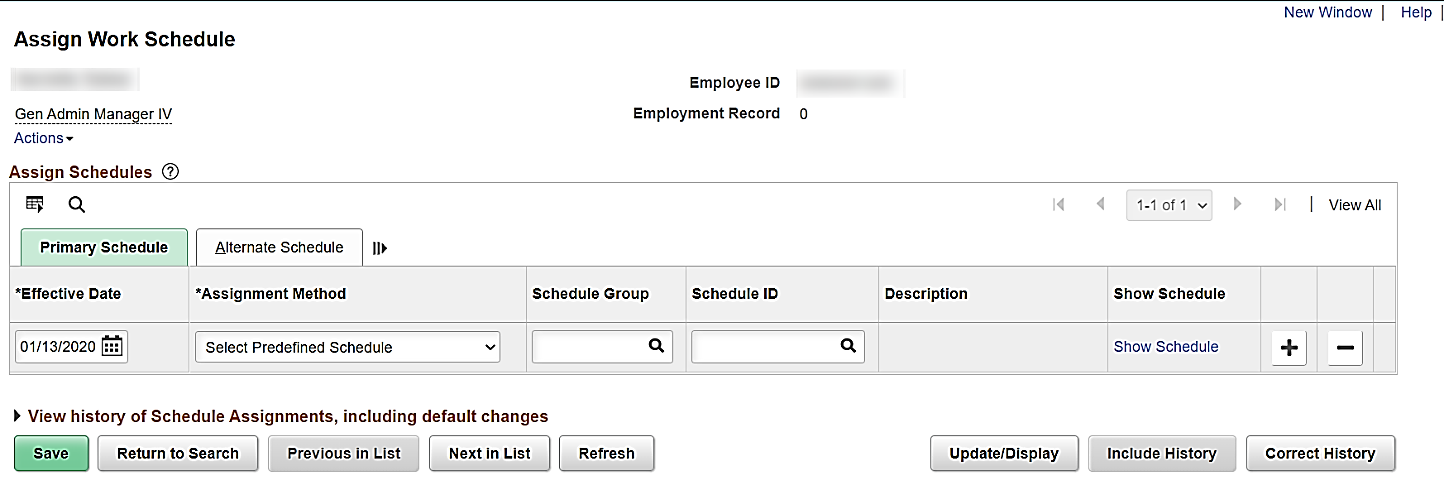
1. Enter the applicable Employee ID in the **Empl ID** field.
2. Click the **Search** button.

The **Assign Work Schedule** page displays with the **Primary Schedule** tab displayed by default.



1. The **Effective Date** field defaults to the current system date. Update this date using the **Effective Date** **Calendar** icon as needed.
2. The **Assignment Method** field defaults to “**Use Default Schedule**”. Change this to “**Select Predefined Schedule**”using the dropdown button.

The **Assign Work Schedule** page refreshes.



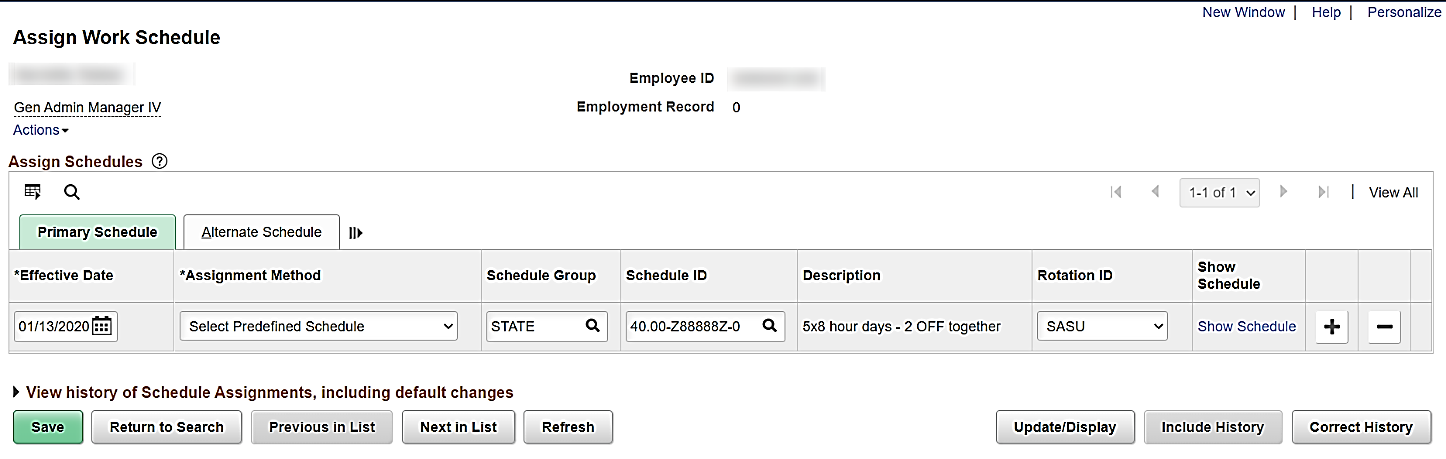
1. Select the applicable Schedule Group using the **Schedule Group** field **Look Up** icon. The Schedule Group determines which schedule options (Schedule IDs) are available for selection. There are two types of Schedule Groups available which are listed below:

* **STATE** **Schedule Group** – the schedule options (Schedule IDs) available for selection are used across all state agencies. Select this option unless there is a schedule that is unique for your agency
* All other **Agency Specific (Business Unit) Schedule Groups** – the schedule options (Schedule IDs) available for selection include weekly schedules that are uniquely configured for the agency (business unit). The use of a Variable schedule (24 hours/7 days) is only found under the agency specific Schedule Groups

1. Select the applicable Schedule ID using the **Schedule ID** field **Look Up** icon. Select the Work Schedule that is appropriate for the employee.

**Note**: Schedule IDs are smart coded, start with the applicable number of hours, and incorporate the on/off pattern of work days for a two-week pay period.

The **Assign Work Schedule** page refreshes.



1. The **Description** and **Rotation ID** fields default based on the Schedule ID selected. The Rotation ID denotes either:
   * The relative day(s) in the schedule pattern where the employee will be off. In this example, the Rotation ID of “**SASU**” indicates that the 2 days off together each week are Saturday and Sunday

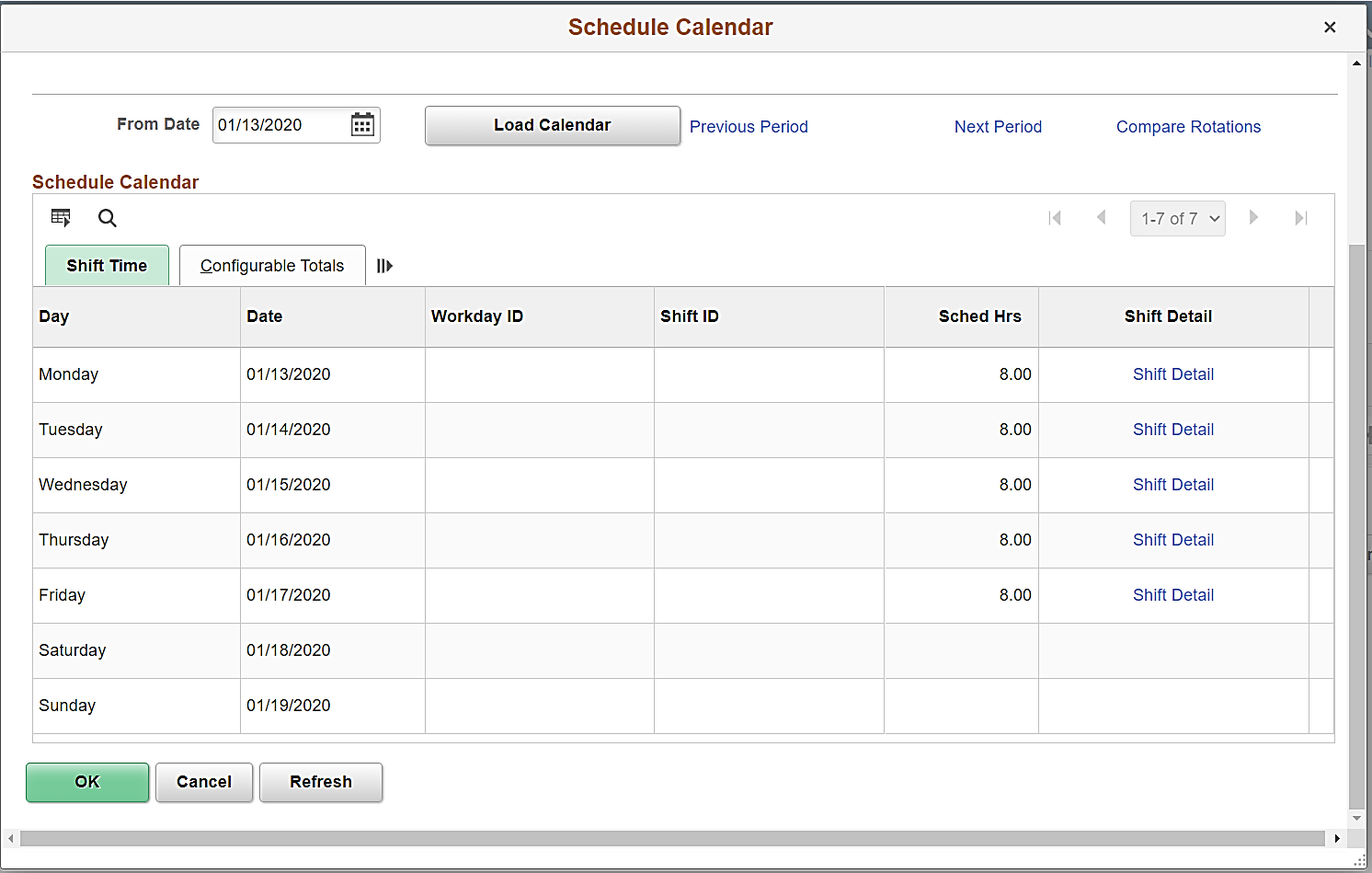
OR

* When a schedule can vary from one week to the next week, you must select which of those weeks needs to be the start week. The correct Rotation ID needs to be selected based on the employee’s first day in the weekly pattern and that is the effective date for the start of that schedule

**Note**: The Rotation IDs available for selection will vary based on the Schedule ID.

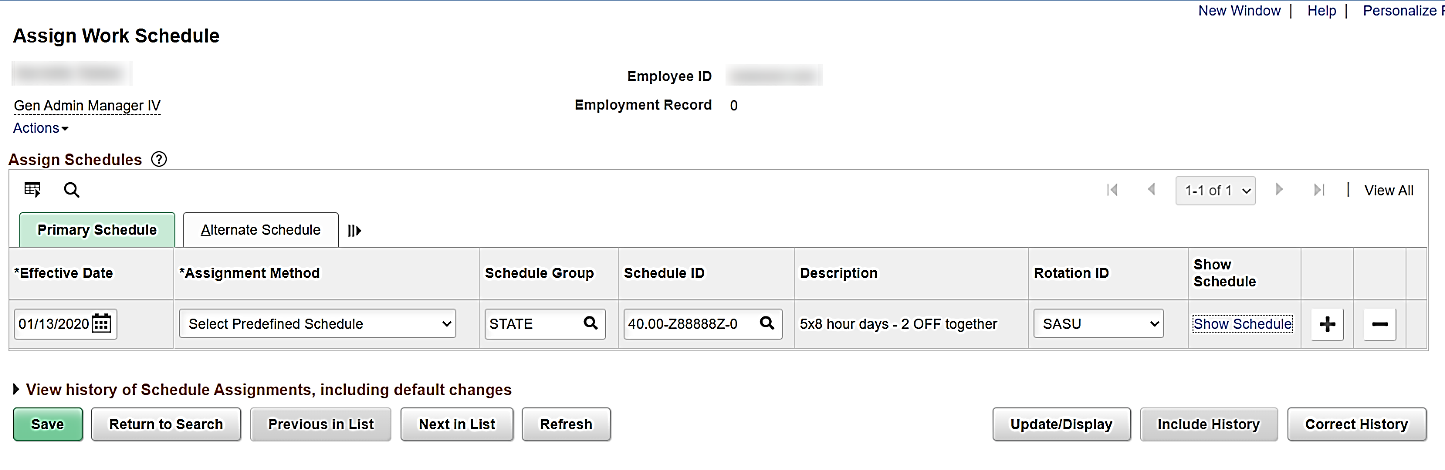
1. Click the **Show Schedule** link to view a visual representation of the schedule and confirm that the correct schedule was selected.

The **Schedule Calendar** page displays in a pop-up window.



1. Review the schedule information. Once confirmed as correct, click the **OK** button.

The **Assign Work Schedule** page returns.

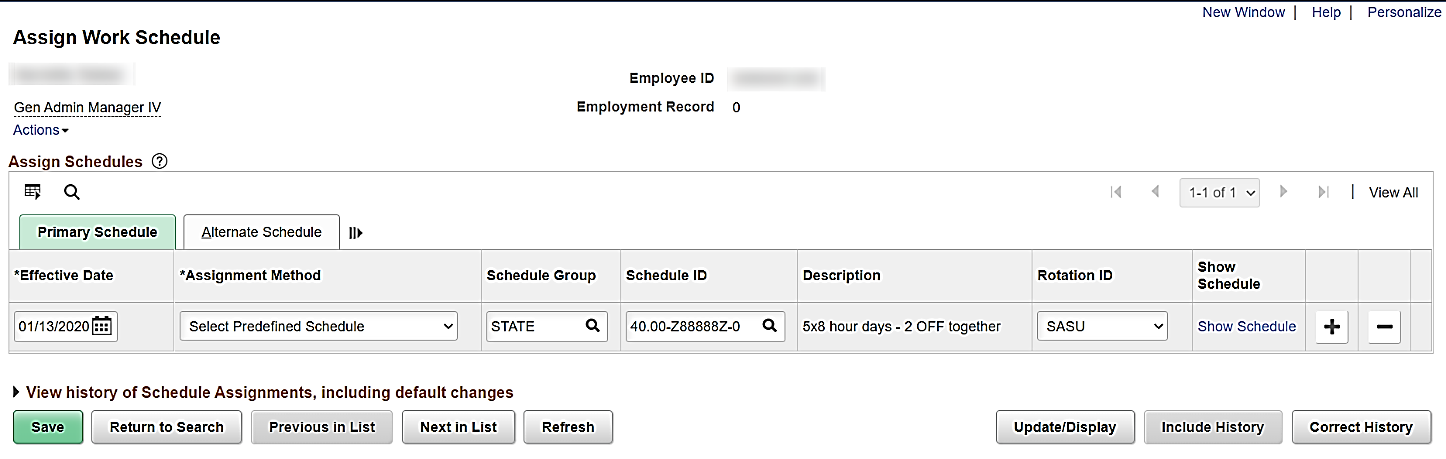


1. Click the **Save** button.

## Updating an Employee’s Assigned Work Schedule

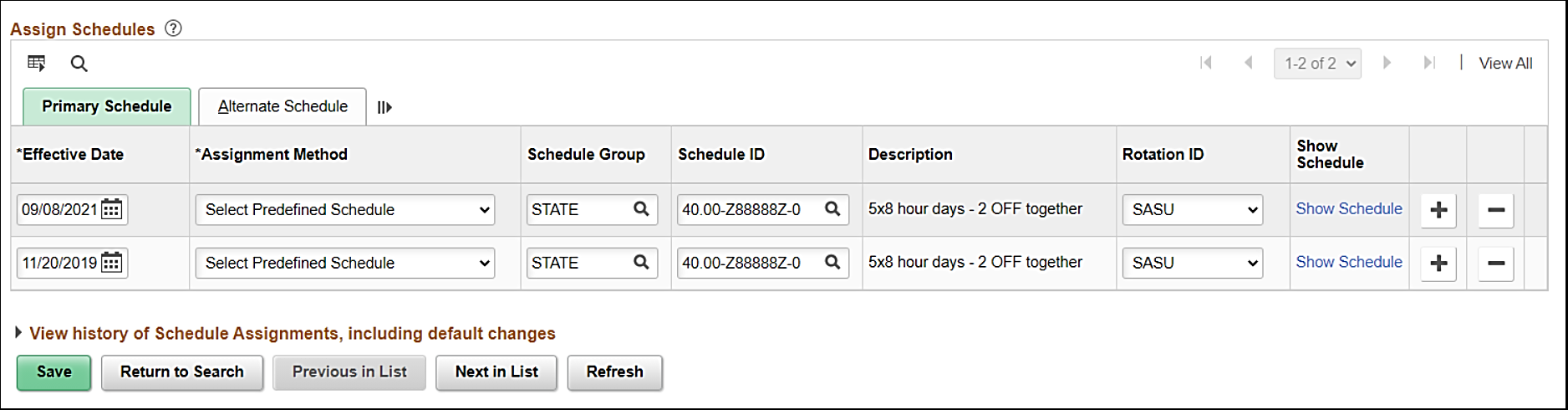
1. To update the assigned Work Schedule for an employee, access the **Assign Work Schedule** page in the same way covered in the “Assigning a Work Schedule to an Employee” section (Steps 1 – 3).

The **Assign Work Schedule** page displays with the **Primary Schedule** tab displayed by default.



1. Click the **Add a New Row** icon.

The **Assign Work Schedule** page refreshes and a new row displays.



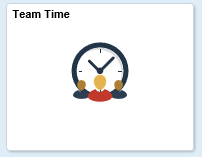
1. The **Effective Date** field defaults to the current system date. Update this date using the **Effective Date** **Calendar** icon. This is the date that the new Work Schedule will take effect for the Employee.
2. Assign the new Work Schedule to the employee in the same way covered in the “Assigning a Work Schedule to an Employee” section (Steps 5 - 11).

# Navigating to the Timesheet

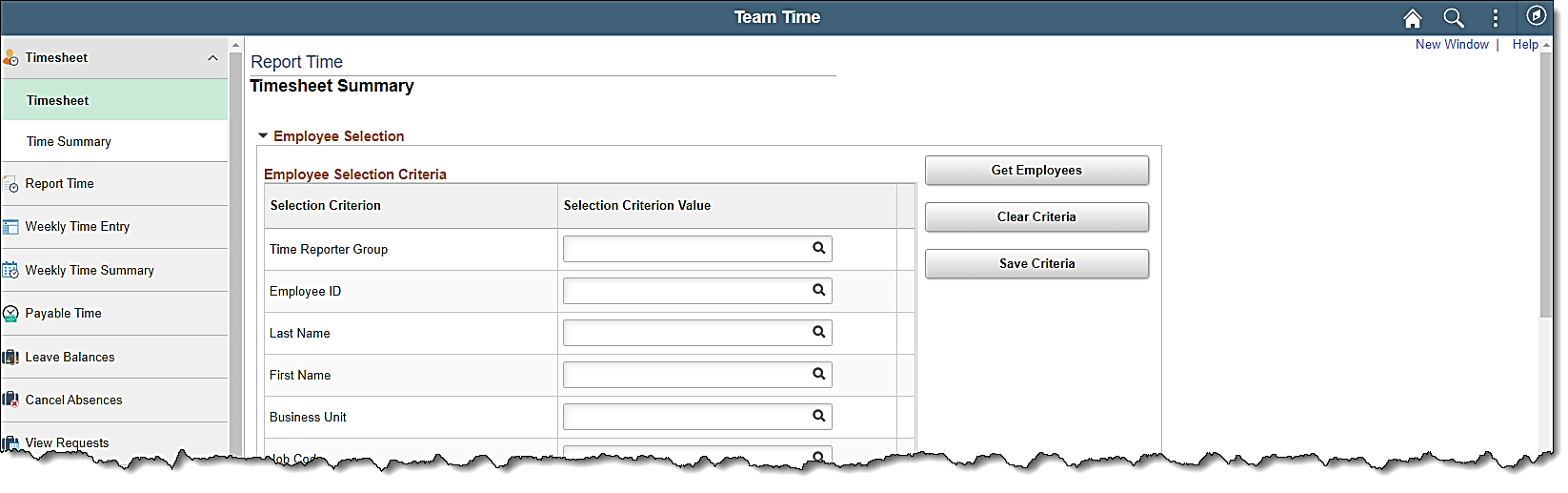
## Navigating to an Employee’s Timesheet (Timekeeper, TA Admin, Supervisor)

1. Navigate to the **Timesheet** page using the following path:

**Team Time Tile > Timesheet**

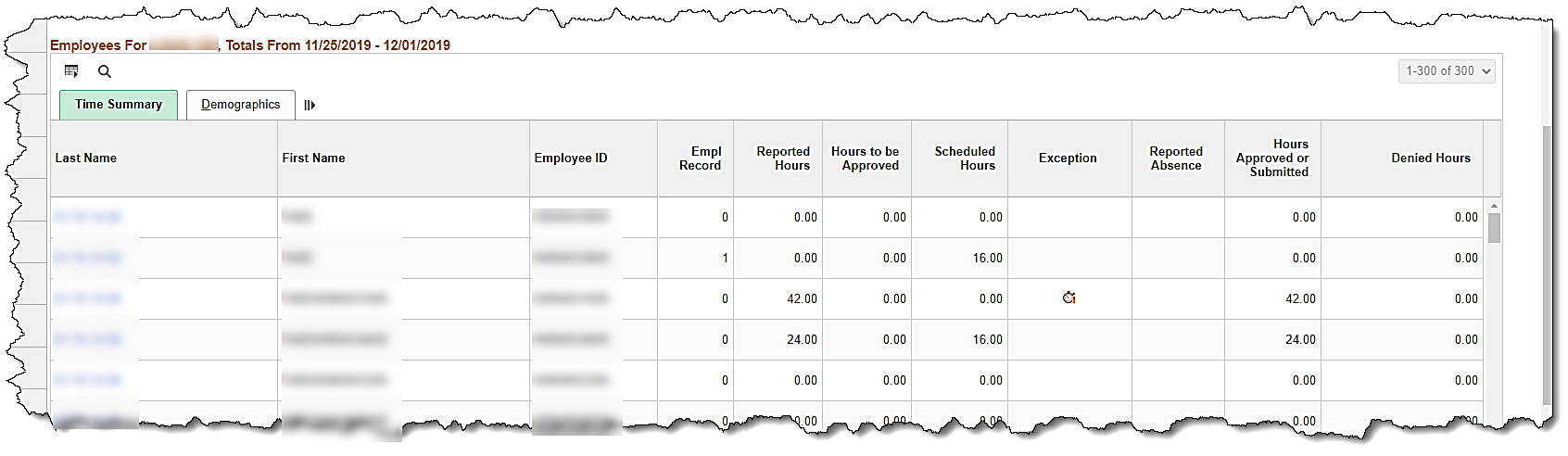


The **Timesheet Summary** page displays.



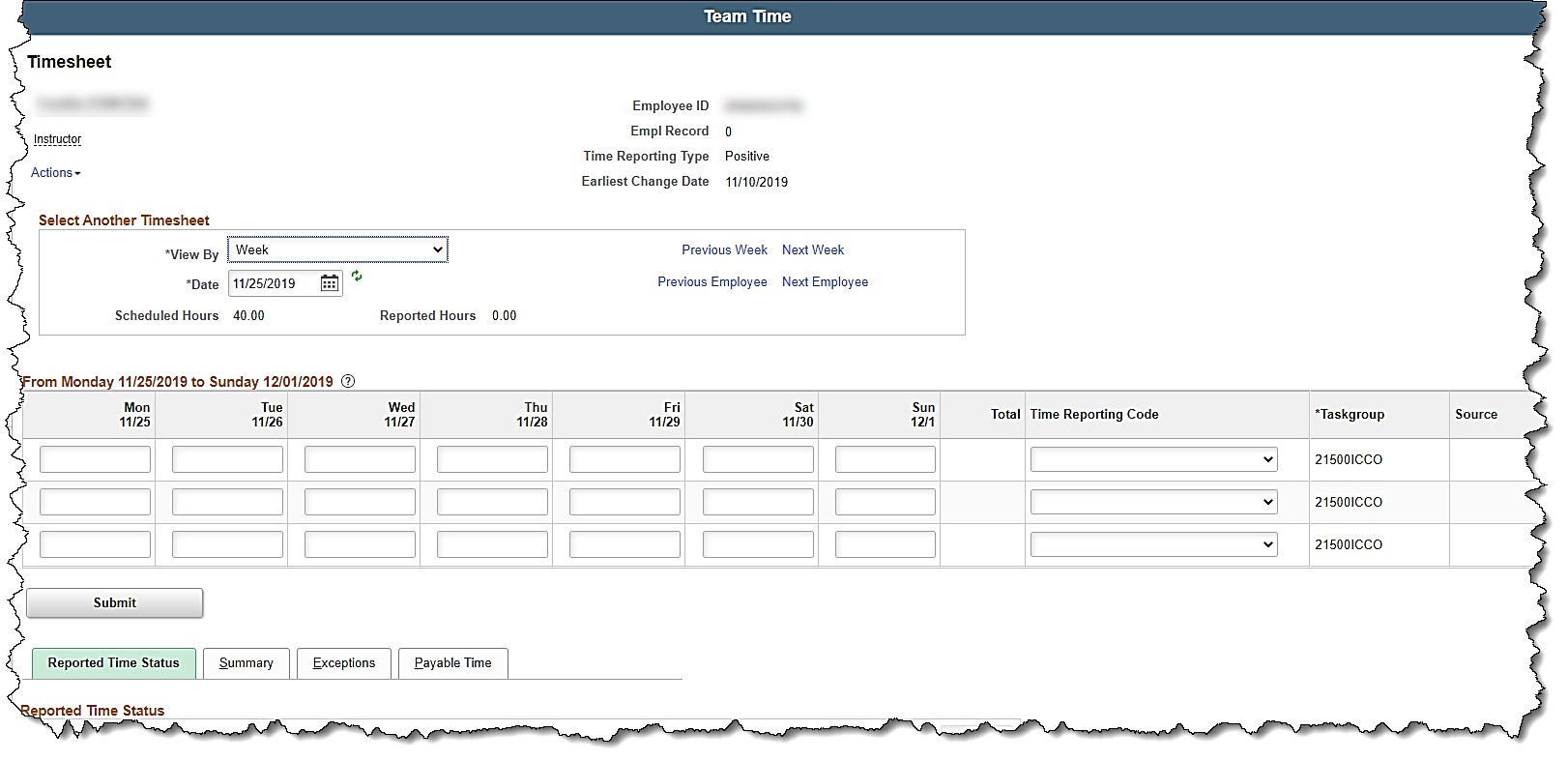
1. Enter the applicable Employee ID or known portion of the Employee ID in the **Employee ID** field.
2. Click the **Get Employees** button.

The **Search Results** display on the bottom portion of the **Timesheet Summary** page.



1. Click on the **Last Name** link for the applicable employee.

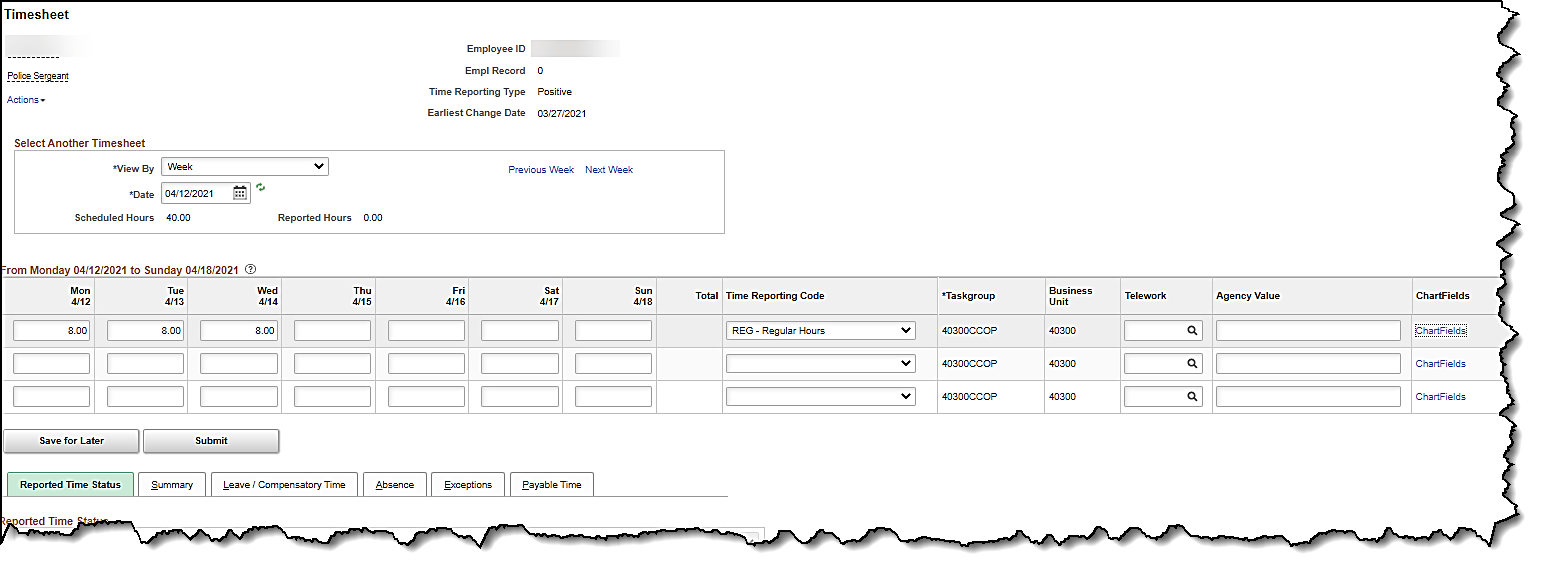
The **Timesheet** page displays for the applicable employee.



## Navigating to the Timesheet as an ESS User (Employee)

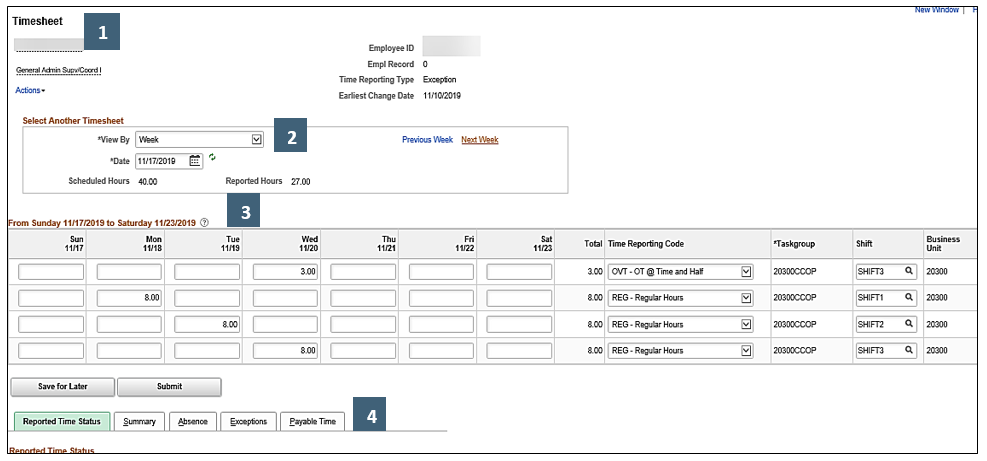
1. Click the **Time** tile on the **Cardinal Homepage** to navigate to the **Timesheet** page.

The **Timesheet** page displays.



**Note**: If the correct week is not displayed, use the **Previous Week** link, **Next Week** link, or **Date** field to navigate to the correct week.

# Timesheet Overview



## Timesheet Header

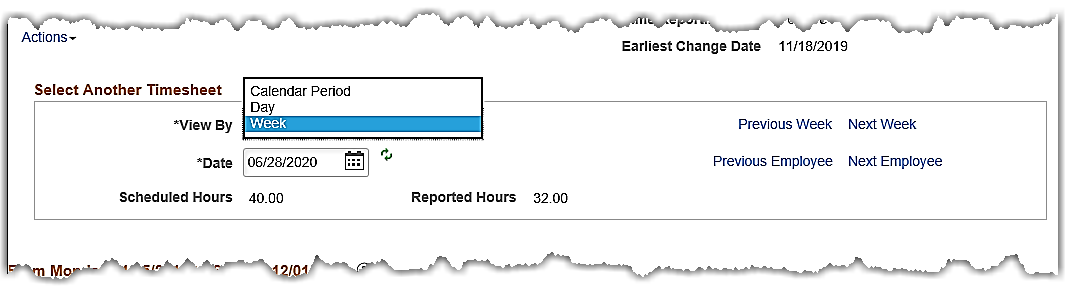
**1**



|  |  |
| --- | --- |
| **Timesheet Header Section** | |
| **Fields/Data** | **Description** |
| Employee Name | Employee’s first and last name (hover over title for additional information) |
| Employee ID | Employee ID Number |
| Job Title | Employee’s job title (hover over title for additional information) |
| Employee Record | An auto-assigned number to uniquely identify an employment instance for an employee. This is used within Cardinal to associate different Jobs to an employee (i.e., record 0, 1, 2, etc.). |
| Time Reporting Type | Positive or Exception |
| Earliest Change Date | This field is used by the Time & Labor Administrators to determine the earliest addition or update to time related date for the employee |
| Actions | Not utilized in Cardinal |

## Select Another Timesheet Section

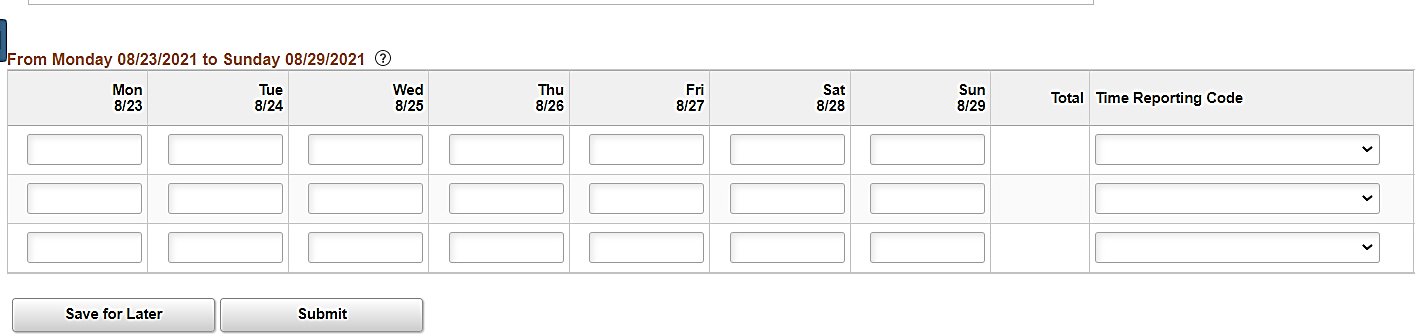
**2**



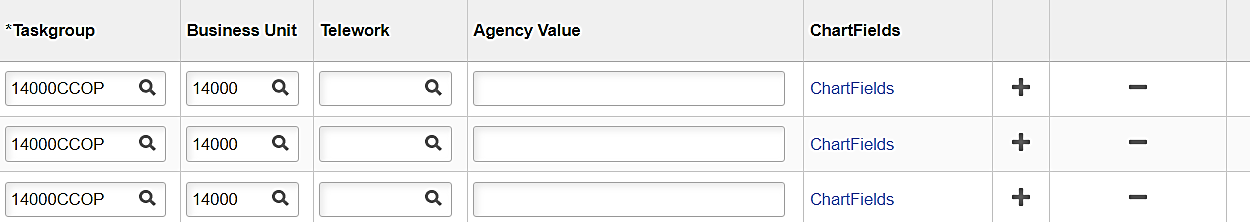
|  |  |
| --- | --- |
| **Select Another Timesheet Section** | |
| **Fields/Data** | **Description** |
| View By | Controls the Timesheet view. The default view of the Timesheet is a weekly format |
| Calendar Period | This view is based on the Pay Calendar (e.g., Salaried 10th-24th or 25th-9th, Faculty 1st-15thor 16th—End of the Month, Hourly biweekly) |
| Day | View one day based on the selection |
| Week | View a one week time period based on the selection |
| Date | Enter a specific date, date in a week, etc. to be shown on the Timesheet. . Click on the **Calendar** icon to open a **Calendar** page and then select the applicable month, year, and day. The week that includes the selected date displays. The start day always defaults to Monday, but can be changed if the scheduled start day is different. |
| Refresh Timesheet Icon | Use this icon to refresh the Timesheet when changes are made to the **View By** and **Date** Fields |
| Scheduled Hours | Displays the total number of hours the employee is scheduled to work for the date(s) selected |
| Reported Hours | Displays the total number of hours the employee reported for the date (s) selected |
| Previous Week | Click this link to view the previous week |
| Next Week | Click this link to view the next week |
| Previous Employee | Click this link to view the previous employee in the list (search results on **Timesheet Summary** page) |
| Next Employee | Click this link to view the next employee in the list (search results on **Timesheet Summary** page) |

## Timesheet Grid

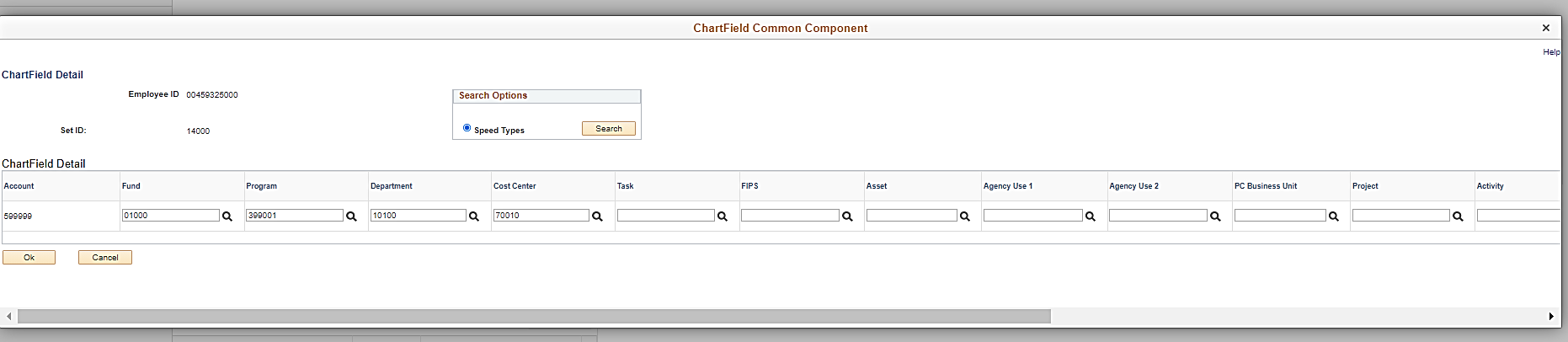
**3**



|  |  |
| --- | --- |
| **Timesheet Grid Section** | |
| **Fields/Data** | **Description** |
| From Monday xx/xx/xxxx to Sunday xx/xx/xxxx | This section is used to enter hours by day and by Time Reporting Code(TRC). This view will vary based on the selections made in the **View By** section |
| Time Reporting Code (TRC) | This dropdown contains codes used to classify the time being reported. The codes will vary based on agency configuration, employee type (e.g., hourly, salaried), the workgroup to which the employee is assigned, and their eligibility (e.g., overtime, compensatory time). |



|  |  |
| --- | --- |
| **Timesheet Grid Section (continued)** | |
| **Fields/Data** | **Description** |
| Taskgroup | Coding string representing a group of time reporters with similar time and task reporting requirements. This drives the billing defaults for the time reporter to the Department, Cost Center, Chart of Account/SpeedTypes, or Project. The Taskgroup string begins with the agency Business Unit. **This field should not be changed** |
| Business Unit | The agency's business unit/company. **This field should not be changed** |
| Telework | (if applicable) Field used to identify time that was approved for telework. The only valid value is “**TELE**” |
| Agency Value | Free form field used to collect agency specific information |
| Add a New Row and Remove a Row icons | The Timesheet grid defaults with three rows for time entry. The **Add a New Row** icon (**+**) and **Remove a Row** (**-**) icon allow the employee or Timekeeper to add or delete rows as needed |
| Shift | Employees who are eligible for shift differential will have the **Shift** field on their timesheet. If a shift differential is not specified, it will default to shift 1. |
| ChartFields | (if applicable) Hyperlink that is available for entry/selection of ChartFields for all time entered. An agency can elect to have ChartFields setup one of the following ways for each employee |
| Default | the ChartField link is not visible on the Timesheet because the funding information will always use the position or department defaults |
| Optional | the ChartField link is visible on the Timesheet because they have the option of overriding the default values as needed |
| Required | the ChartField link is visible on the Timesheet and ChartFields must be entered on the Timesheet for all productive time |

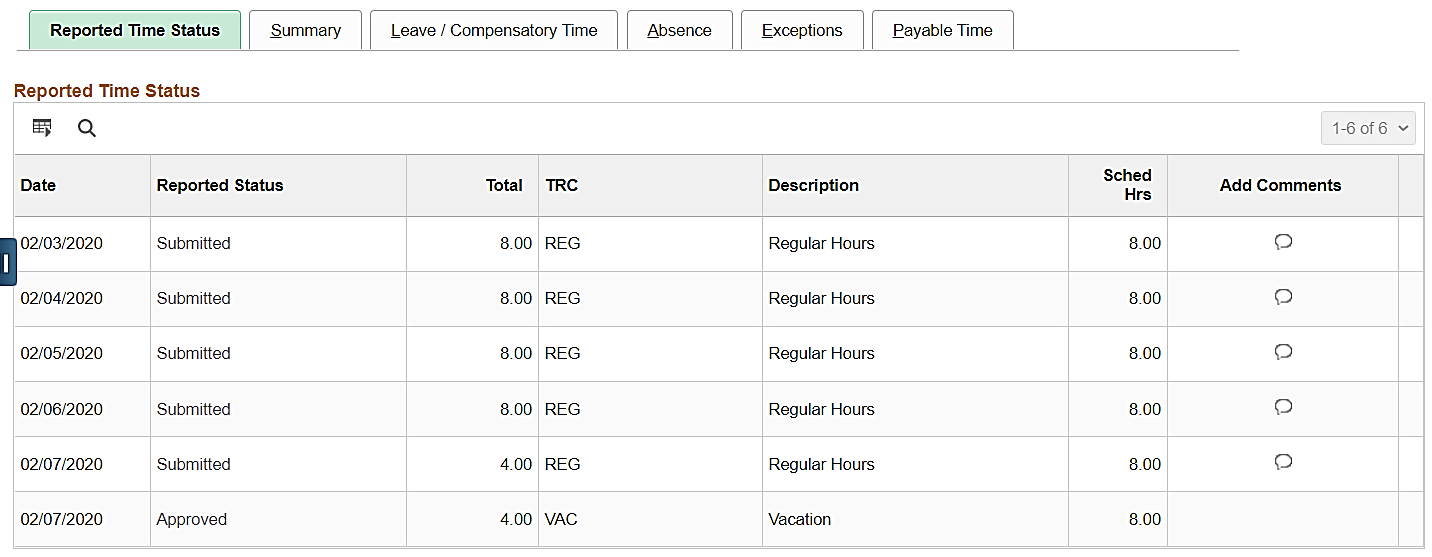
****

|  |  |
| --- | --- |
| **ChartField Common Component Page** | |
| **Fields/Data** | **Description** |
| \*\*Speed Types | Speed Types are configured by PPS and when used, they will auto-populate the ChartFields segments based on pre-defined criteria. Not all agencies have elected to use Speed Types |
| ChartField Detail Segments | These fields can be entered manually or auto-populated by using a Speed Type |

## Timesheet Tabs

**4**

**Reported Time Status Tab**:



|  |  |
| --- | --- |
| **Reported Time Status Tab** | |
| **Fields/Data** | **Description** |
| Date | Date of entry |
| Reported Status | Displays the current status. See the next section for a full list of statuses. |
| Total | Total number of hours reported for this date entry |
| TRC | Time Reporting Code associated with the hours reported |
| Description | Description of the Time Reporting Code |
| Scheduled Hours | Total number of scheduled hours for this date |
| Add Comments | The **Add/Review Comments** icon is available for productive and non-productive time from the Timesheet. This icon is not available for absences. |

Below are charts showing the Reported Time Status descriptions and actions available based on grace periods and roles.

**Reported Time Status Descriptions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Status Type** | **Status** | **Code** | **Next Status** | **Description** | **Agency Type** |
| Reported Time | Saved | SV | SB | Time that has been entered, but not submitted for processing | Online |
| Reported Time | Saved | SV | NA | Absence that has been entered, but not submitted for approval | AM |
| Reported Time | Saved | SV | NA | Time for interfacing employee that has been saved online but not submitted for approval | Interfacing |
| Reported Time | Submitted | SB |  | Time that has been reported and submitted for processing | Online |
| Reported Time | Needs Approval | NA | AP | Absence that has been submitted and is pending approval | AM |
| Reported Time | Needs Approval | NA | AP, CL | Time for interfacing employee that has been submitted online and is pending approval | Interfacing |
| Reported Time | Approved | AP |  | Absence that has been approved | AM |
| Reported Time | Approved | AP |  | Time for interfacing employee that has been interfaced as approved or submitted and approved online | Interfacing |
| Reported Time | Closed | CL |  | Time closed by the TA Expired Grace Approver | Online + Interfacing |

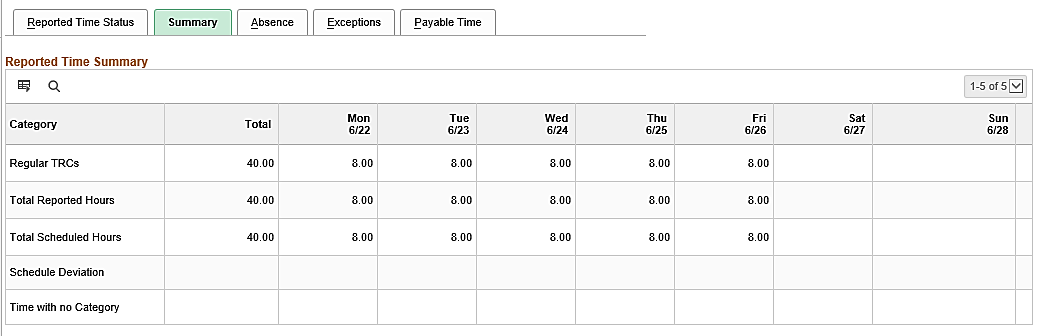
\* Agencies using Cardinal online for TA will only see a status of either Saved or Submitted for time entered on the Timesheet Grid.

\*\*Agencies using Cardinal Absence Management only will see Needs Approval or Approved for absences. Interfacing Agencies will generally only see Approved when the time is successfully interfaced into Cardinal.

**Reported Time Status actions available based on grace periods and roles.**

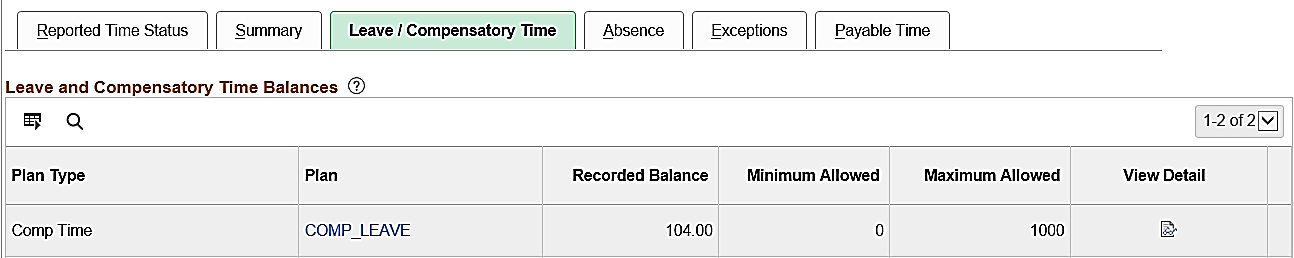
|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Status Type** | **Code** | **Agency Type** | **<90 days** | **>90 <365** | **>365** |
| Reported Time | SV | Online | \*Employee/Supervisor/Timekeeper/TL Admin Submit or Delete | \*TL Admin Submit or Delete \*TA Expired Grace Approver Close or Delete | \*TA Expired Grace Approver Close or Delete |
| Reported Time | SV | AM | \*Employee/Supervisor/Timekeeper/TL Admin Submit or Cancel | \*TL Admin Submit or Cancel \*AM Admin Approve or Void or Delete | \*AM Admin Approve or Void or Delete (must request PPS to override 1 year retro limit for processing) |
| Reported Time | SV | Interfacing | \*TL Admin Submit or Delete/Cancel | \*TL Admin Submit or Delete/Cancel \*TA Expired Grace Approver Close or Delete | \*TA Expired Grace Approver Close or Delete |
| Reported Time | SB | Online | No action needed | No action needed | No action needed |
| Reported Time | NA | AM | \*Employee/Supervisor/Timekeeper/TL Admin Cancel \*Supervisor Approve | \*TL Admin Cancel \*Supervisor Approve \*AM Admin Approve or Void or Delete | \*AM Admin Approve or Void or Delete (must request PPS to override 1 year retro limit for processing) |
| Reported Time | NA | Interfacing | \*Supervisor Approve \*TL Admin Delete | \*Supervisor Approve (Must be done same day as Submit) \*TL Admin Delete \*TA Expired Grace Approver Close or Delete | \*TA Expired Grace Approver Close or Delete |
| Reported Time | AP | AM | No action needed | No action needed | No action needed |
| Reported Time | AP | Interfacing | No action needed | No action needed | No action needed |
| Reported Time | CL | Online + Interfacing | No action needed | No action needed | No action needed |

**Summary Tab**:



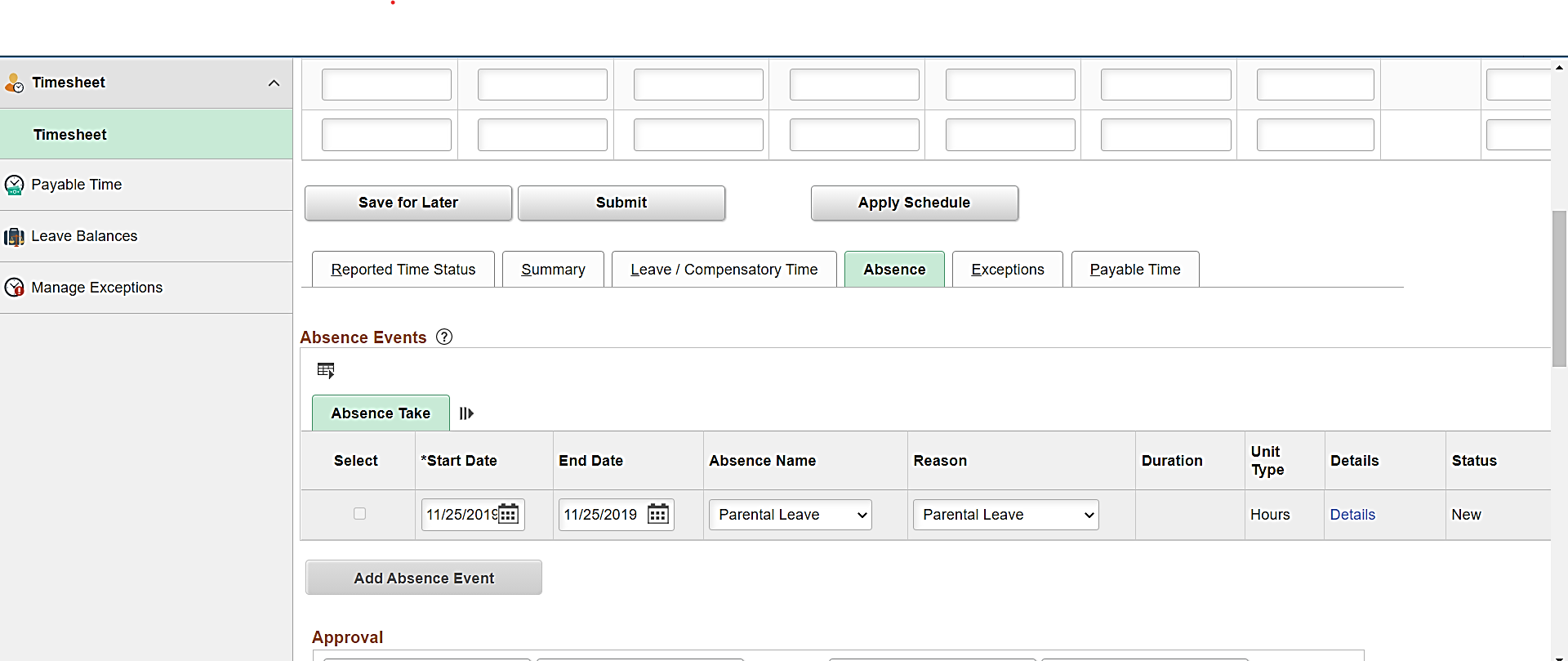
|  |  |
| --- | --- |
| **Summary Tab** | |
| **Fields/Data** | **Description** |
| Category | Reported time by category (this screenshot only displays what was submitted for this example, other TRCs could display here) |
| Regular TRCs | Hours reported using Regular Time Reporting Code |
| Total Reported Hours | The number of Regular Hours reported |
| Total Scheduled Hours | The number of Scheduled Hours |
| Scheduled Deviation | The number of reported hours greater or less than the employee’s Scheduled Hours |
| Time with no Category | Hours will not be displayed in this field as Cardinal prevents users from submitting hours without a Time Reporting Code |
| Total | Total number of hours reported for the week |
| Date | Hours reported by date |

**Leave/Compensatory Time Tab**:



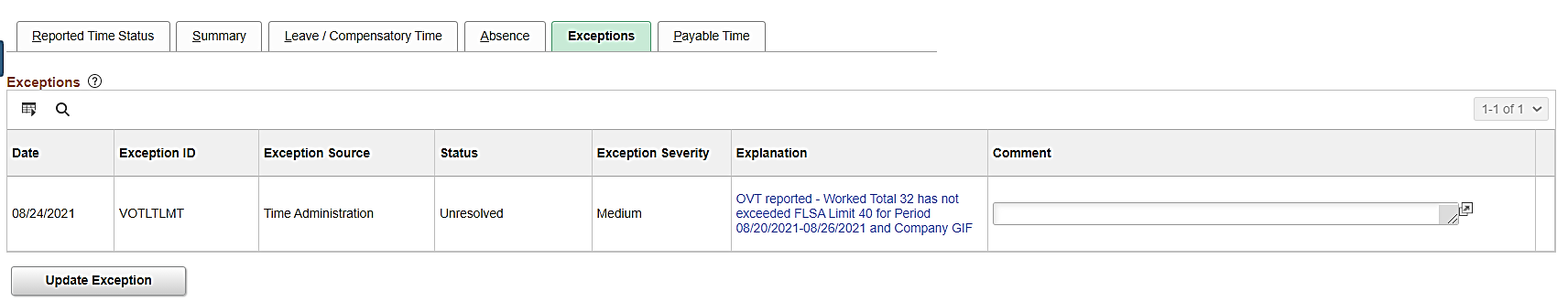
|  |  |
| --- | --- |
| **Leave/Compensatory Time Tab** | |
| **Fields/Data** | **Description** |
| Plan Type | Displays the Plan Type |
| Plan | Displays the Plan as either Comp or Leave Plan |
| Recorded Balance | Displays the employee’s current balance |
| Minimum Allowed | This is not the actual minimum number of hours allowed. This is a system defaulted value. The actual minimum hours allowed will be based on Agency policy. |
| Maximum Allowed | This is not the actual maximum number of hours allowed. This is a system defaulted value. The actual maximum hours allowed will be based on agency policy. |
| View Detail | Optionally, click this icon to view additional details including the expiration date |

**Absence Tab**:



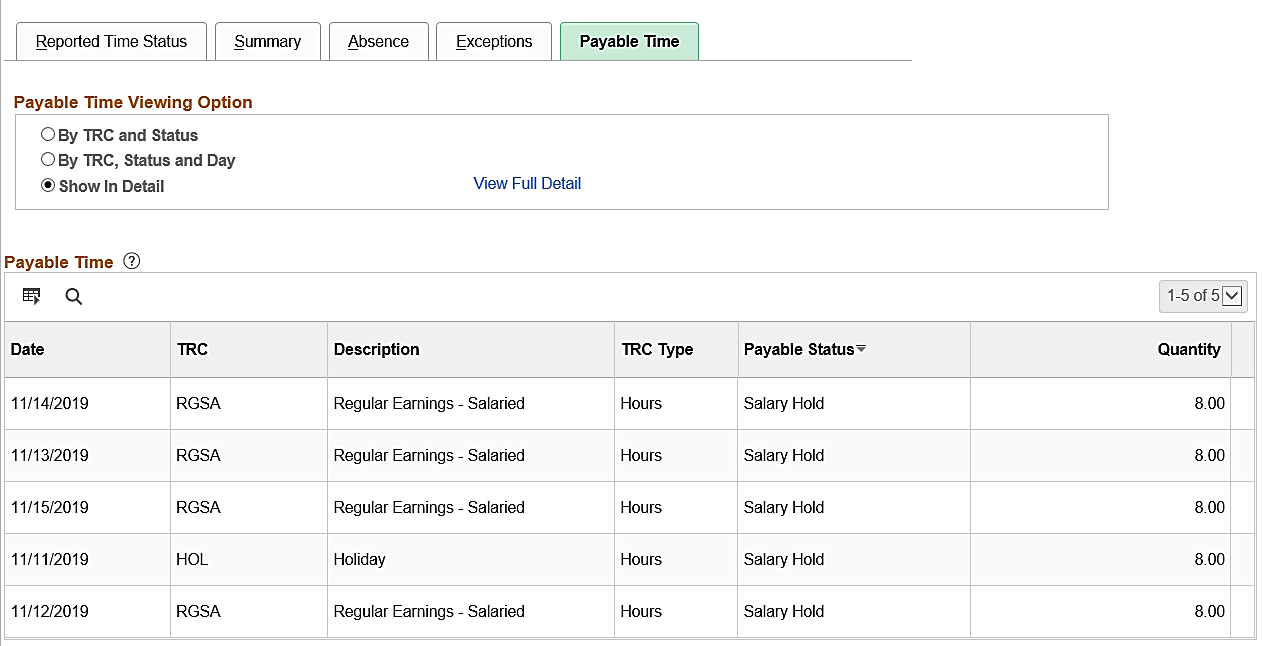
|  |  |
| --- | --- |
| **Absence Tab** | |
| **Fields/Data** | **Description** |
| Absence Take | Displays any absence event(s) that have been entered for the Timesheet dates |
| Add Absence Event | Click this button to add a new absence event |

**Exception Tab**:



|  |  |
| --- | --- |
| **Exception Tab** | |
| **Fields/Data** | **Description** |
| Date | Date associated with the time that generated the exception |
| Exception ID | ID code used to identify Exceptions (For a detailed list of all exceptions, see the job aid titled **TA Exceptions** located on the Cardinal Website in **Job Aids** under **Learning**) |
| Exception Source | This field will always display as Time Administration |
| Status | Displays the current status of the exception. Please note that once resolved, the Exception will clear and no longer display here |
| Exception Severity | This field will display one of the following: Low, Medium, or High |
| Explanation | A brief description of the Exception. Click the link to view additional information |
| Comment | This field is optionally used to provide a comment pertaining to the exception |

**Payable Time Tab**:



|  |  |
| --- | --- |
| **Payable Time Tab** | |
| **Fields/Data** | **Description** |
| View Full Detail | Optionally, click this link to view additional details about the payable time |
| Date | Date associated with the time |
| TRC | Time Reporting Code associated with the time |
| Description | Description of Time Reporting Code |
| TRC Type | Will always display as Hours |
| Payable Status | Displays the current status. See the next section for a complete list of statuses |
| Quantity | Number of hours entered |

Below are charts showing the Payable Time Status descriptions and actions available based on grace periods and roles.

**Payable Time Status Descriptions**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Status Type** | **Status** | **Code** | **Next Status** | **Description** | **Agency Type** |
| Payable Time | Needs Approval | NA | AP, VS, VH, CH, CL, NP | Time that has been processed by Time Administration and is pending approval | Online |
| Payable Time | Approved | AP | SP then TP | Time that has been approved and ready for payroll/distribution | Online |
| Payable Time | Estimated | ES | SP then TP | Time that does not require approval and is ready for payroll/distribution | Online + Interfacing |
| Payable Time | Overtime Hold | VH | AP | Time for salaried employees subject to overtime lag that has not yet been released for load to payroll | Online |
| Payable Time | Salary Hold | VS | PD | Time for salaried employees included in base pay pending distribution | Online |
| Payable Time | No Pay | NP |  | Time does not require pay or distribution | Online + Interfacing |
| Payable Time | Rejected by Payroll | RP | SP then TP or CL | Time rejected by load to payroll process | Online + Interfacing |
| Payable Time | Reversed | RV |  | Time reversed by payroll | Online + Interfacing |
| Payable Time | Sent to Payroll | SP | TP or RP | Time is in process of being loaded to payroll | Online + Interfacing |
| Payable Time | Taken by Payroll | TP | PD | Time loaded to payroll pending payroll processing | Online + Interfacing |
| Payable Time | Distributed | PD |  | Time paid and/or distributed to General Ledger | Online + Interfacing |
| Payable Time | Closed | CL |  | Time closed by distribution process, time rejected by payroll closed by TL Admin, or time closed by the TA Expired Grace Approver | Online + Interfacing |

**Payable Time Status actions available based on grace periods and roles.**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **Status Type** | **Code** | **Agency Type** | **<90 days** | **>90 <365** | **>365** |
| Payable Time | NA | Online | \*Supervisor Approve | \*TA Expired Grace Approver Approve \*TL Admin Delete Reported Time \*TA Expired Grace Approver Close or Delete | \*TA Expired Grace Approver Close or Delete |
| Payable Time | AP | Online | No action needed | No action needed | No action needed |
| Payable Time | ES | Online + Interfacing | No action needed | No action needed | No action needed |
| Payable Time | VH | Online | No action needed | No action needed | No action needed |
| Payable Time | VS | Online | No action needed | No action needed | No action needed |
| Payable Time | NP | Online + Interfacing | No action needed | No action needed | No action needed |
| Payable Time | RP | Online + Interfacing | \*Payroll Admin/TL Admin/SPO fix problem and reload time \*TL Admin Close | \*Payroll Admin/TL Admin/SPO fix problem and reload time \*TL Admin Close | \*Nightly job will Close |
| Payable Time | RV | Online + Interfacing | No action needed | No action needed | No action needed |
| Payable Time | SP | Online + Interfacing | No action needed | No action needed | No action needed |
| Payable Time | TP | Online + Interfacing | No action needed | No action needed | No action needed |
| Payable Time | PD | Online + Interfacing | No action needed | No action needed | No action needed |
| Payable Time | CL | Online + Interfacing | No action needed | No action needed | No action needed |

# Time Reporting Codes

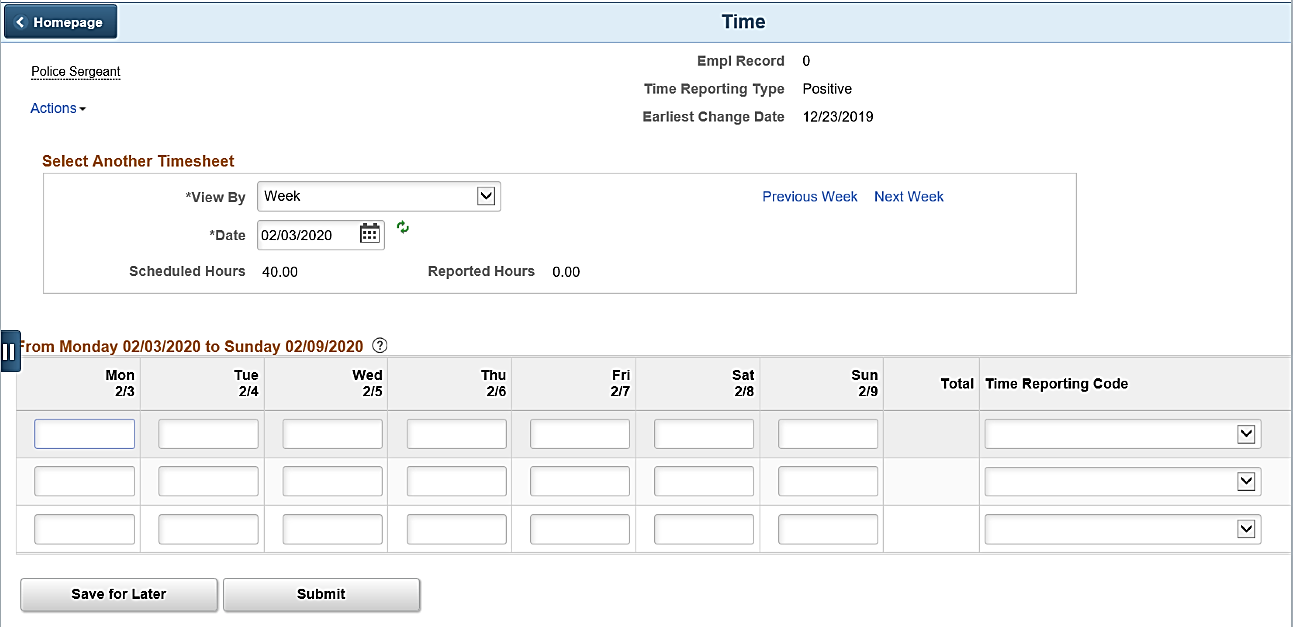
| **Comp Time Plan** | **Time Reporting Codes (TRCs) Descriptions** | **TRC Selections on Timesheet** |
| --- | --- | --- |
| CARDINAL | Holiday, Holiday Pay Docking, Holiday Straight Extra, Office Closing | CLO, HNPM, HOLM, HOS |
| COMP\_LEAVE | Comp Leave Earned, Compensatory Leave Taken, Comp Time Leave Payout, Comp Time Leave Adjust, Comp Time Leave Deduction, Comp Time Leave Adjust CNV, Holiday Straight Earned, for employees using Cardinal Absence Management | CALHE, CCA, CCD, CCL, CPO, ECHS, HCS, OCS, ONCHE |
| OT\_LEAVE | Overtime Leave Earned, Overtime Leave Taken, Overtime Leave Payout, Overtime Leave Adjust, Overtime Leave Deduction, Overtime Leave Adjust CNV, for employees using Cardinal Absence Management | CALHE, ECT, OCA, OCD, OCL, OCT, OPO |
| PAID-OVS | OT @ Straight Time | OVS |
| PAID-OVT | OT @ Time and Half | OVT |
| PAID-EOS | Emerg OT @ Straight Time | EOS |
| PAID-EOT | Paid Emerg OT @ Time and Half | EOT |
| PAID-CALHP | Called Out Hours (Paid) | CALHP |
| PAID-ONCHP | On-Call Hours (Paid) | ONCHP |
| NONPROD\_PD | Not required non-productive leave codes for employees using External Leave system | ADMR, ALIR, BMOR, CCLR, CLOR, CSLR, DLRR, DSKR, DSSR, ELPR, ELWR, EMSR, ERLR, FCSR, FSKR, FVCR, LTDR, MBLR, MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, VACR, WRIR, ALIR, BMOR, CCLR, CLOR,CSLR, DLRR, DSKR, DSRR, ELPR, ELWR, EMSR, ERLR, FCSR FSKR, FVCR, LTDR, MBLR,MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, WCIR |
| NONPROD\_RQ | Required non-productive leave codes for employees using External Leave system | HCSR, HNPR, HOLR, HOSR, LNPR, STDR, STLR, WCLR, WCPR, WCSR |
| EARNOT-ONC | On-Call Hours (Earn) for employees using External Leave system | ONCHR |
| EARNAM-ONC | On-Call Hours (Earn) for employees using Cardinal Absence Management | ONCHE |
| EARNOT-CAL | Called Out Hours (Earn) for employees using External Leave system | CALHR |
| EARNAM-CAL | Called Out Hours (Earn) for employees using Cardinal Absence Management | CALHE |
| EARNOT-ECS | Emergency Comp Earn for employees using External Leave system | ECSR |
| EARNAM-ECS | Emergency Comp Earn for employees using Cardinal Absence Management | ECS |
| EARNOT-OCS | Comp Leave Earned for employees using External Leave system | OCSR |
| EARNOT-OCT | Overtime Leave Earned for employees using External Leave system | OCTR |
| EARNOT-ECT | Emergency OT Leave Earned for employees using External Leave system | ECTR |
| EARNAM-ECT | Emergency OT Leave Earned for employees using Cardinal Absence Management | ECT |
| AMNT–ONC$$ | On-Call Amount |  |
| AMNT-CAL$$ | Called Out Amount |  |
| AMNT-DIF$$ | Weekend/Holiday Diff Amount |  |
| AMNT-MED$$ | MedicationAmount |  |

# Time Entry

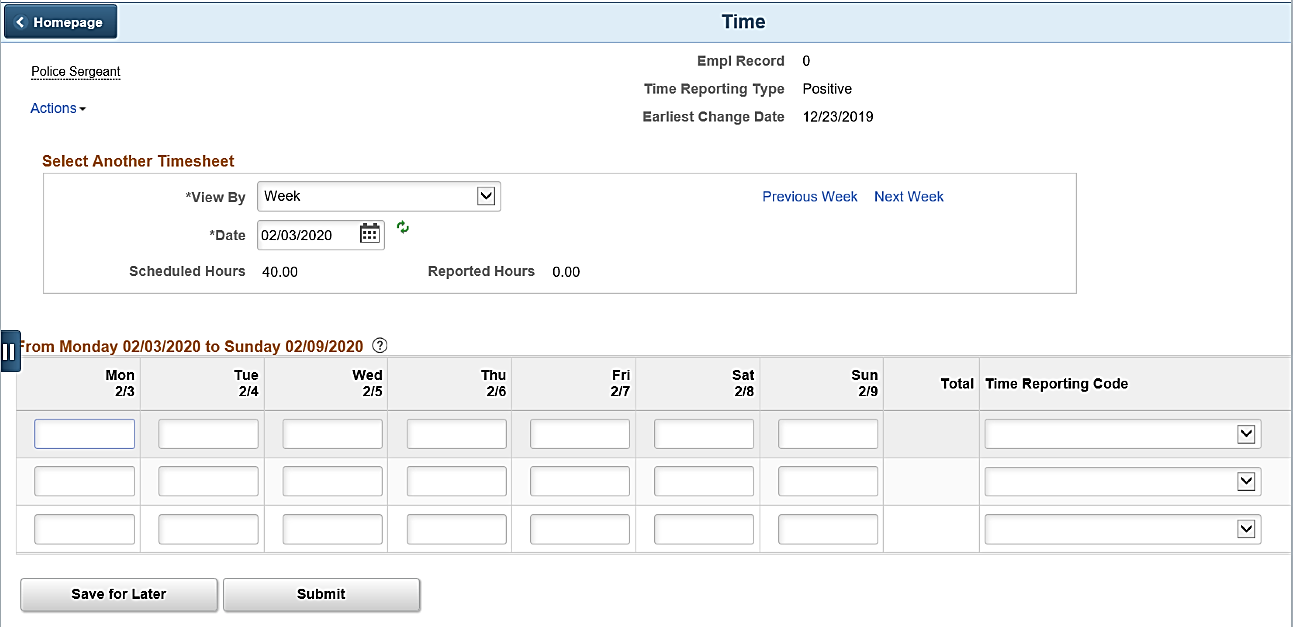
## Positive Time Reporter

1. Navigate to the employee’s Timesheet.

The **Timesheet** page displays.



1. Ensure that the correct Timesheet (dates) is displayed. Use the **Date** field, **Previous Week** link, or **Next Week** link within the **Select Another Timesheet** section as needed to navigate to the correct Timesheet.

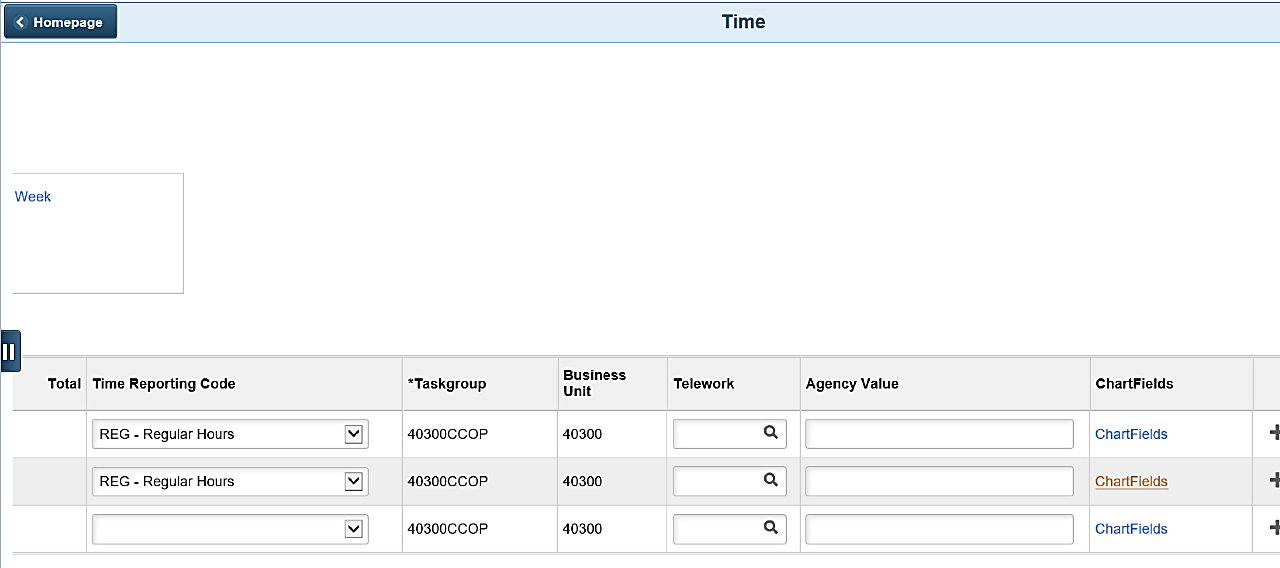


1. Use the first available row within the Timesheet Grid to enter the regular hours worked for each

applicable day.

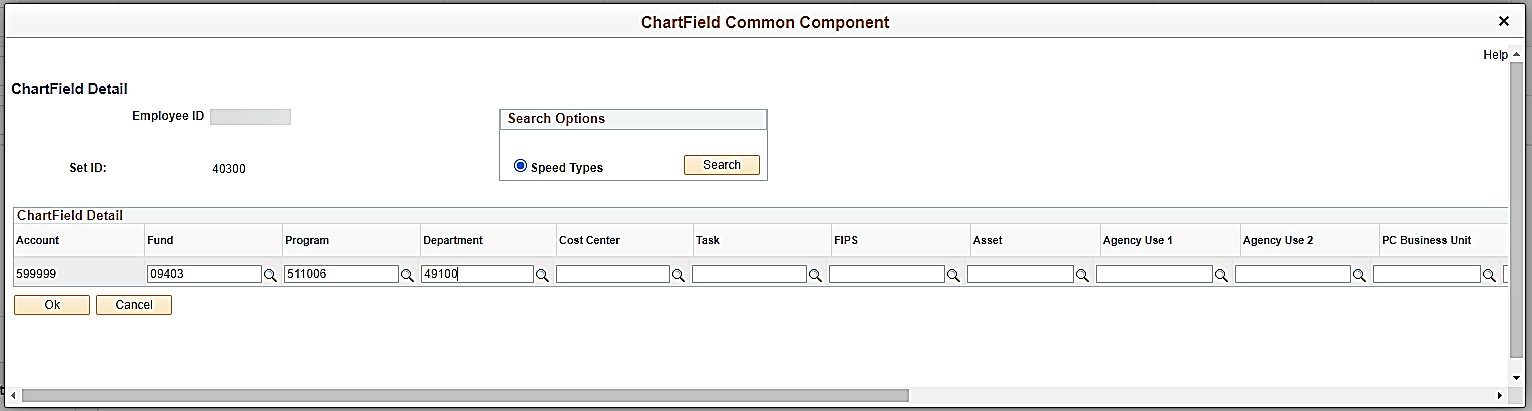
1. Select the applicable Time Reporting Code for the first row.
2. Repeat Steps 3 and 4 to report any hours that need to be associated with a different Time Reporting Code or ChartField Distribution.

The following Steps (Steps 6 - 8) only need to be completed if ChartFields are required or if ChartFields are optional and any row of hours need to be charged against a ChartField distribution other than the default. If ChartField entry is not required, skip to Step 11.



1. Click the **ChartFields** link for the applicable row.

The ChartField Common Component page displays in a pop-up window.

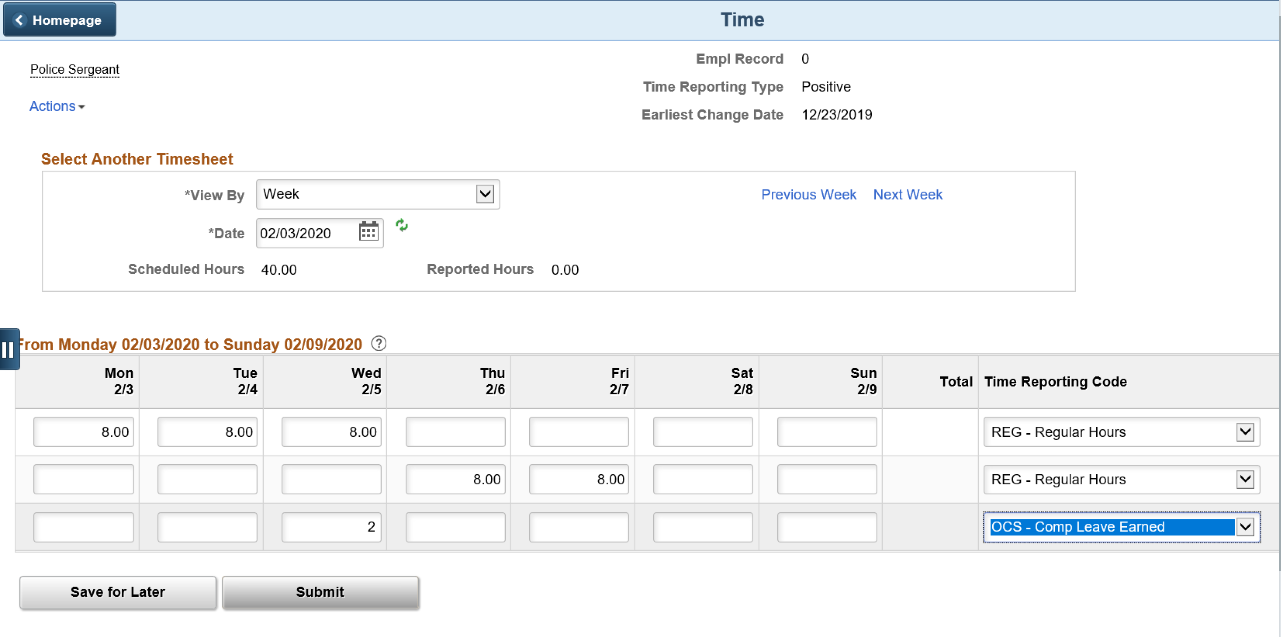


1. Enter the applicable ChartField distribution segments.

**Note**: If the Agency is using Speed Types, optionally use the Speed Types functionality to define all or part of the ChartField distribution segments.

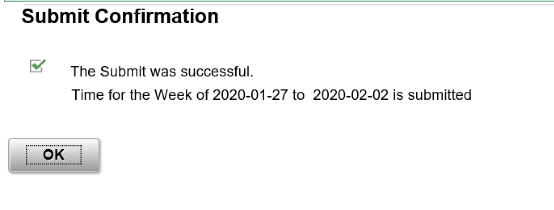
1. Click the **OK** button.

The **Timesheet** page redisplays.



1. Repeat Steps 6 – 8 if ChartField distribution information needs to be defined for any additional rows.
2. Click the **Submit** button to submit the Timesheet for approval and processing.

The **Submit Confirmation** page displays.

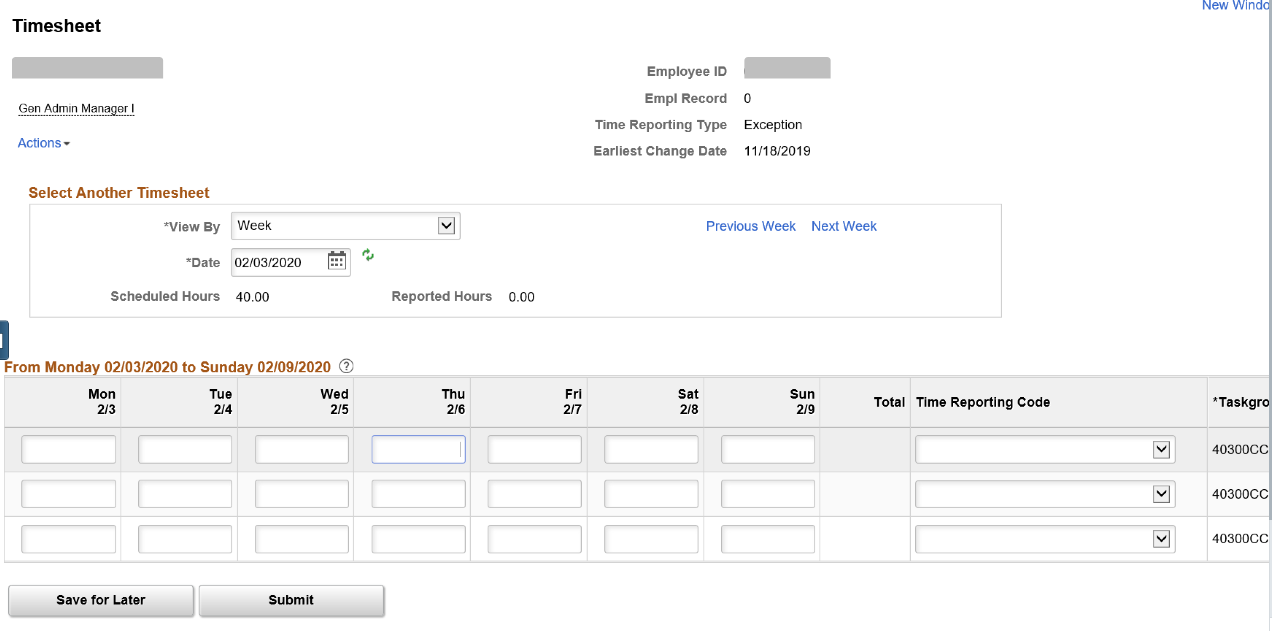


1. Click the **OK** button.

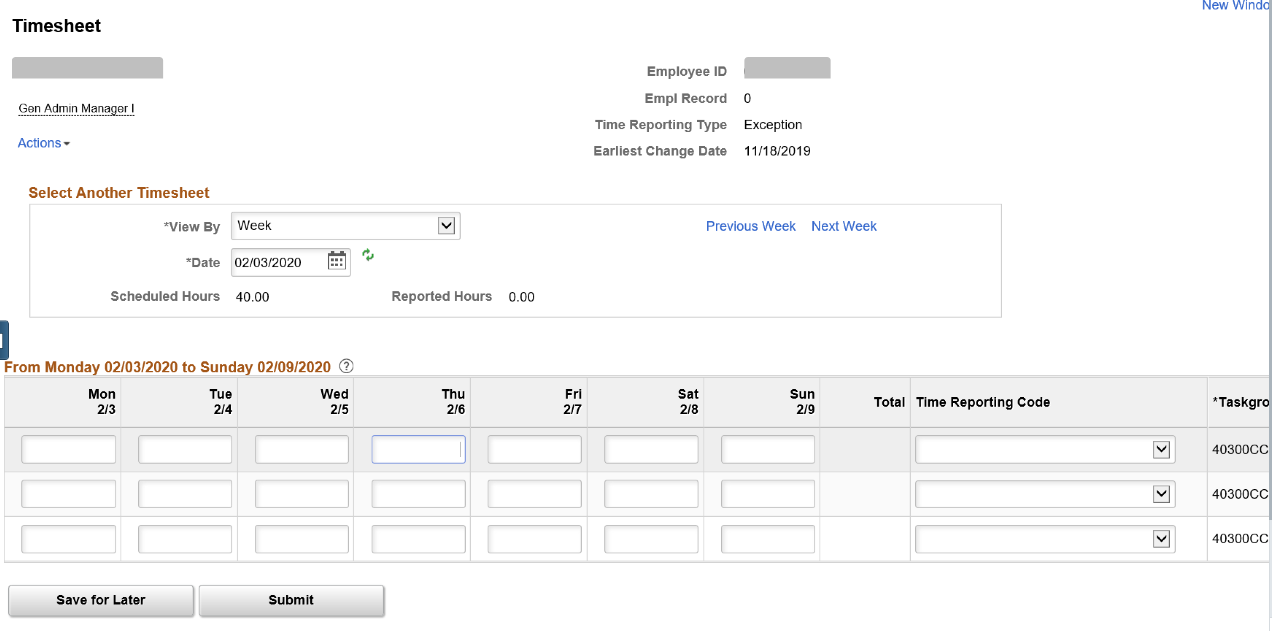
## Exception Time Reporter

1. Navigate to the Timesheet.

The **Timesheet** page displays.

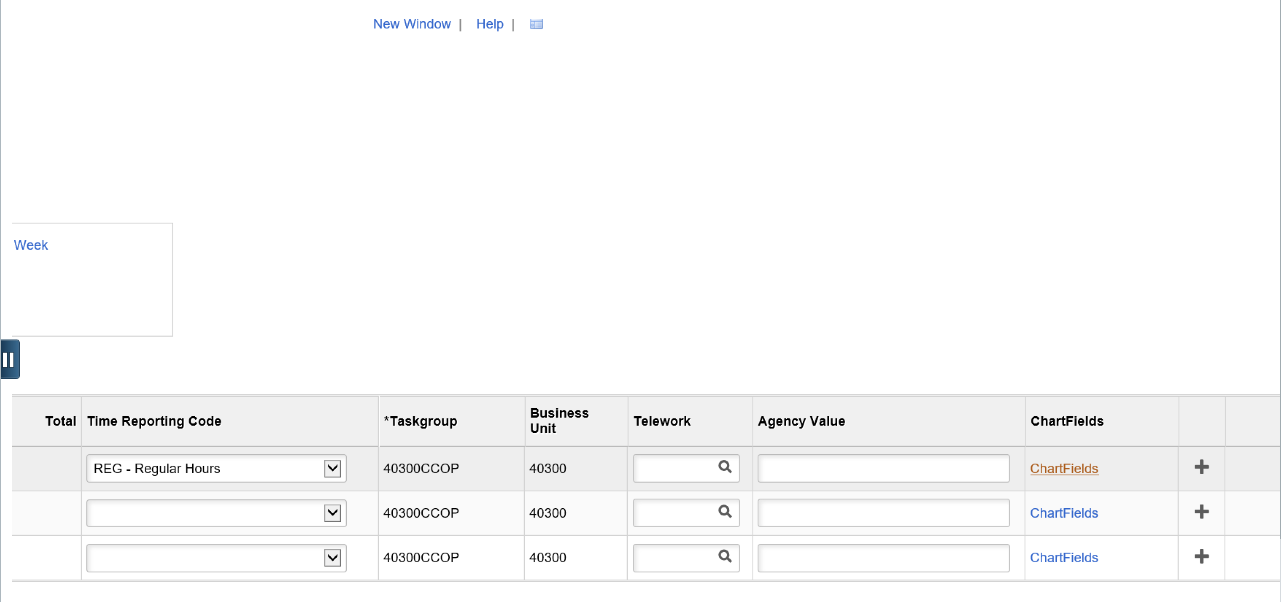


1. Ensure that the correct Timesheet (dates) is displayed. Use the **Date** field, **Previous Week** link, or **Next Week** link within the **Select Another Timesheet** section as needed to navigate to the correct Timesheet.



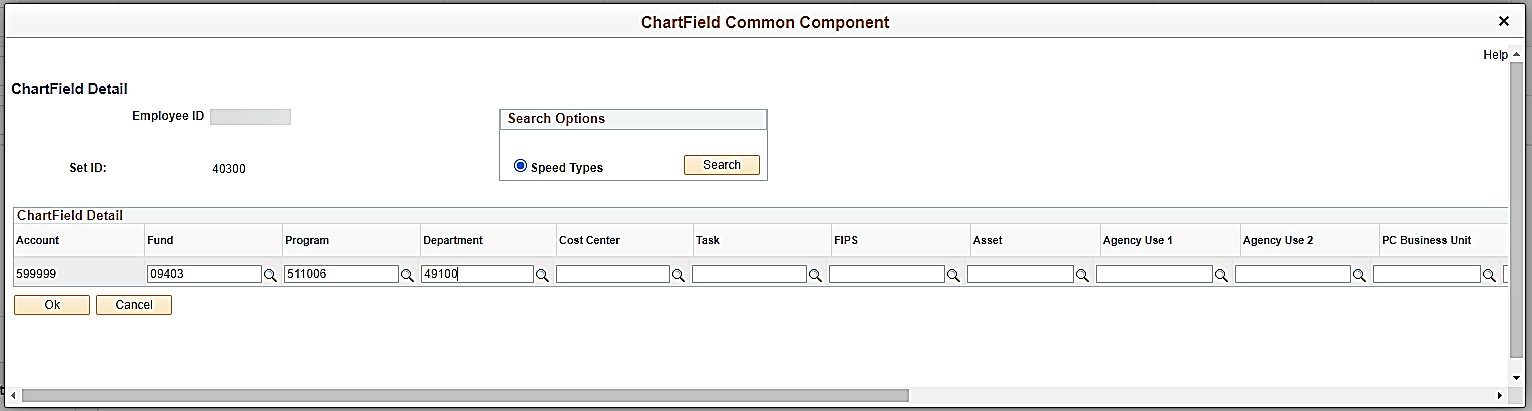
1. Use the first available row within the Timesheet Grid to enter any exception time that needs to be reported on the day(s) it occurred.
2. Select the applicable Time Reporting Code for the first row.
3. Enter the regularly scheduled hours for each day that any exception time was reported using the next available row.
4. Select the applicable Time Reporting Code.

The following Steps (Steps 7 - 9) only need to be completed if ChartFields are required or if ChartFields are optional and any row of hours need to be charged against a ChartField distribution other than the default. If ChartField entry is not required, skip to Step 11.



1. Click the **ChartFields** link for the applicable row.

The ChartField Common Component page displays in a pop-up window.

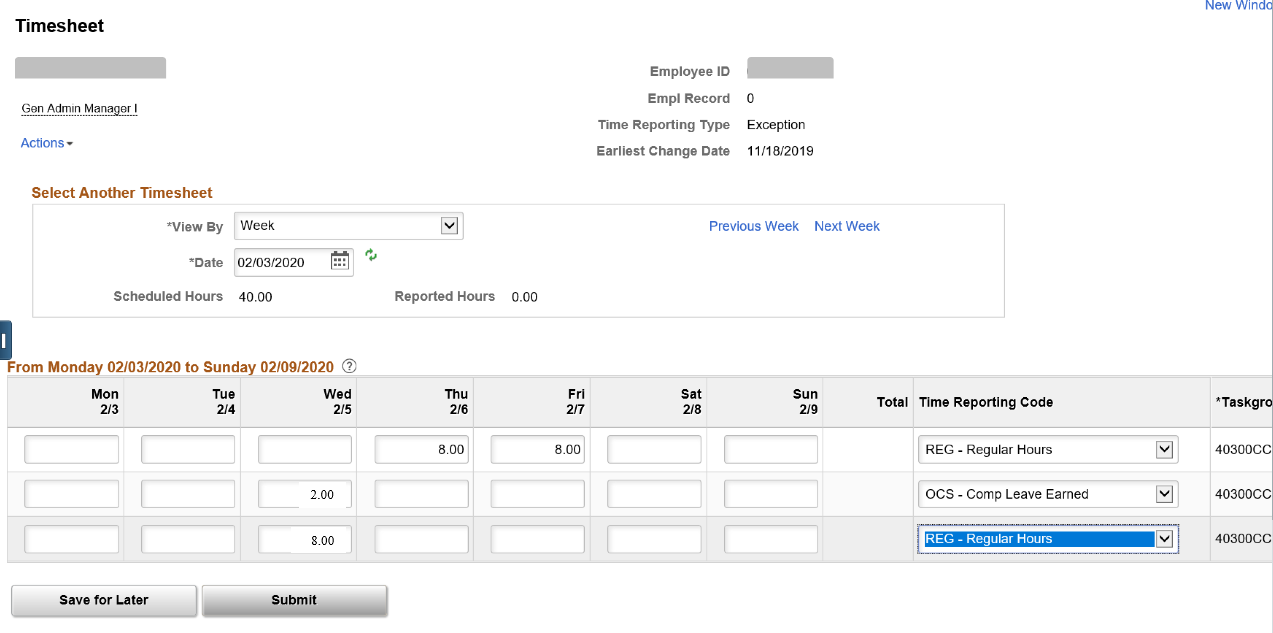


1. Enter the applicable ChartField distribution segments.

**Note**: If the Agency is using Speed Types, optionally use the Speed Types functionality to define all or part of the ChartField distribution segments.

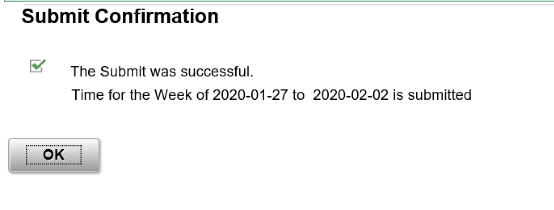
1. Click the **OK** button.

The **Timesheet** page redisplays.



1. Repeat Steps 7 – 9 if ChartField distribution information needs to be defined for any additional rows.
2. Click the **Submit** button to submit the Timesheet for approval and processing.

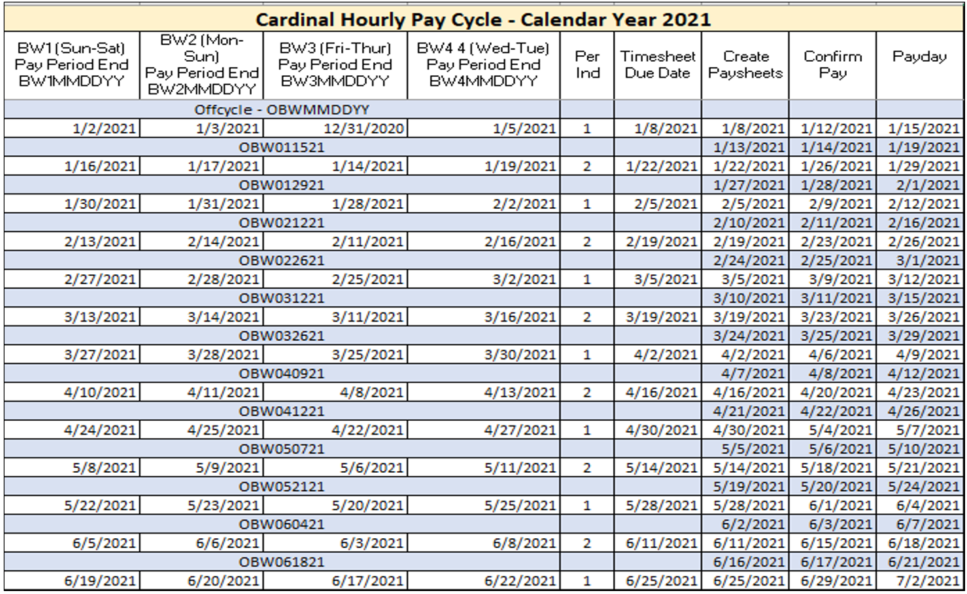
The **Submit Confirmation** page displays.



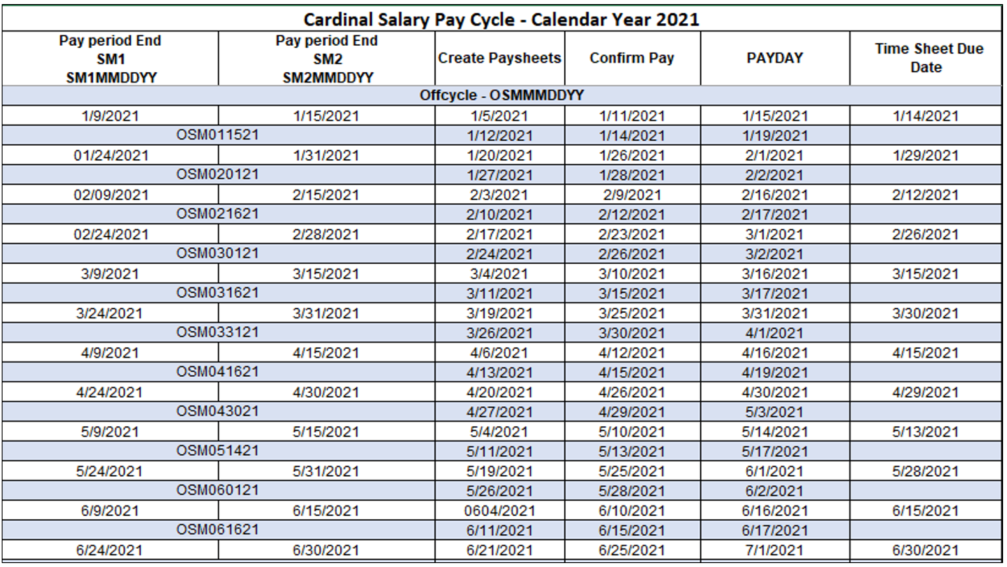
1. Click the **OK** button.

# Sample Pay Calendars

## Sample Hourly Pay Calendar



## Sample Salaried Pay Calendar

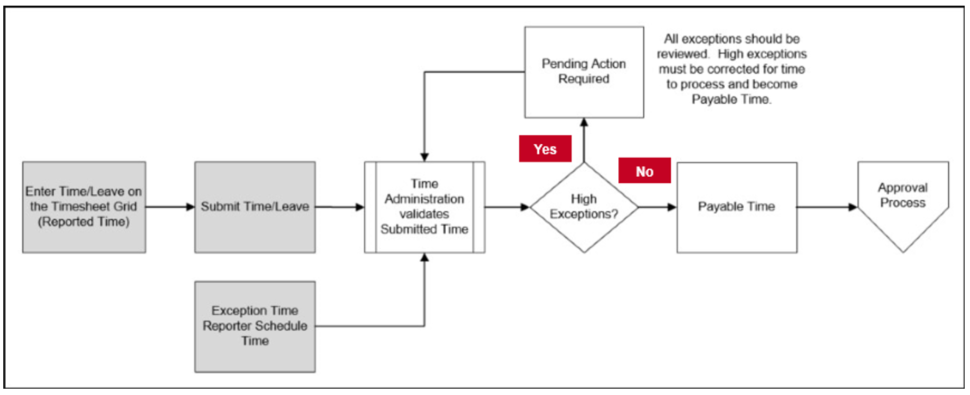


# Time Administration Process

After employees/timekeepers enter and submit time/leave on the Timesheet, it is picked up for processing by the Time Administration process. This is an automated process that is run periodically throughout the day, which processes Reported Time (time/leave entered in the Timesheet grid).

The Time Administration process:

* Validates Reported Time against rules and generates time exceptions (low, medium or high severity) when it does not meet the rule criteria
* High severity time exceptions prevent the time from becoming payable, so those time exceptions must be reviewed, corrected, and resubmitted
* Generates Payable Time (from Reported Time with no time exceptions or low/medium time exceptions)
* Generates Payable Time for Exception Time Reporters based on their Work Schedule and Reported Time on the Timesheet
* Generates Holiday Payable Time (if applicable)
* Generates Shift Payable Time (if applicable)
* Routes the generated Payable Time for approval when approval is required



# Time Exceptions

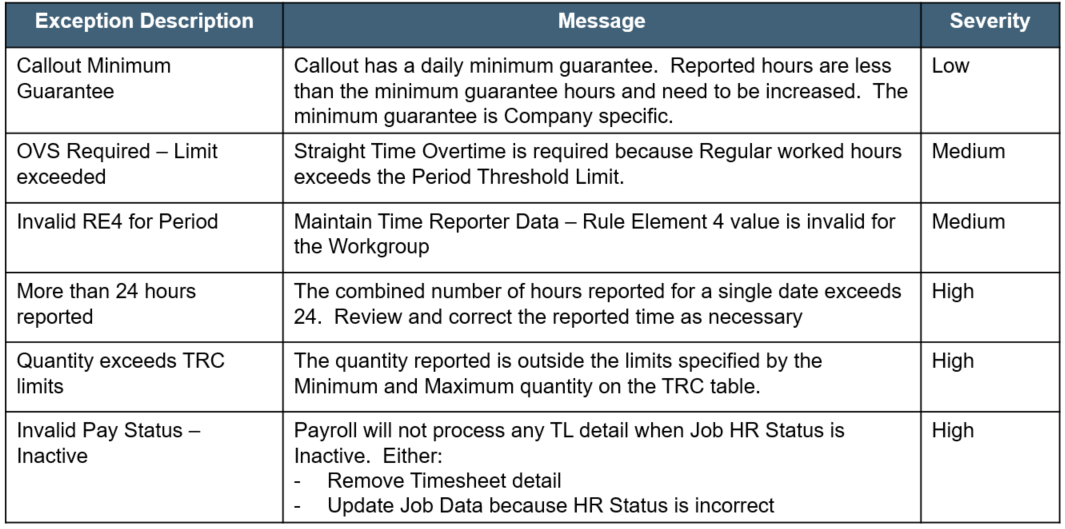
General Information:

After the Time Administration process completes, the following time exception scenarios can occur:

* **No exceptions**: Submitted time becomes Payable Time.  No action is required prior to approval
* **Low** or **medium severity exceptions**: Submitted time becomes Payable Time with low or medium exceptions. The time exceptions should be reviewed, resolved, or allowed prior to approval
* **High severity exceptions**: Submitted time does not become Payable Time.  Once corrected, Time Administration will clear the exception and the time becomes Payable Time.  High severity exceptions **must** be reviewed and either resolved or allowed so that approval can occur and the employee can be paid correctly

While the TL Supervisor is responsible for ensuring that all time exceptions are resolved or allowed, before approving the time, the TL Administrator should review exceptions to make sure, at a minimum, no high exceptions exist before time is loaded/distributed by payroll and that supervisors are allowing exceptions when appropriate.

Time Exception Examples:



For a detailed list of all exceptions, see the job aid titled **TA Exceptions**. This job aid is located on the Cardinal website in **Job Aids** under **Learning**.

# Absence Events

General Information:

Leave specifically refers to comp and overtime leave, which is entered on the Timesheet. All other types of leaves are referred to as absences and are entered on the **Absence** tab section of the Timesheet.

It is very important that the employee’s Work Schedule is accurate because absence durations, in many cases, are determined based on the Work Schedule.

**Note**: If the employee’s Work Schedule is not accurate, contact a Supervisor, TL Administrator, or TL Setup Administrator.

Absence events are created on the Timesheet by the employee based on the following guidelines:

* On the Timesheet associated with the date(s) of the absence
* If the absence is going to span across multiple pay/FMLA periods, multiple absence events need to

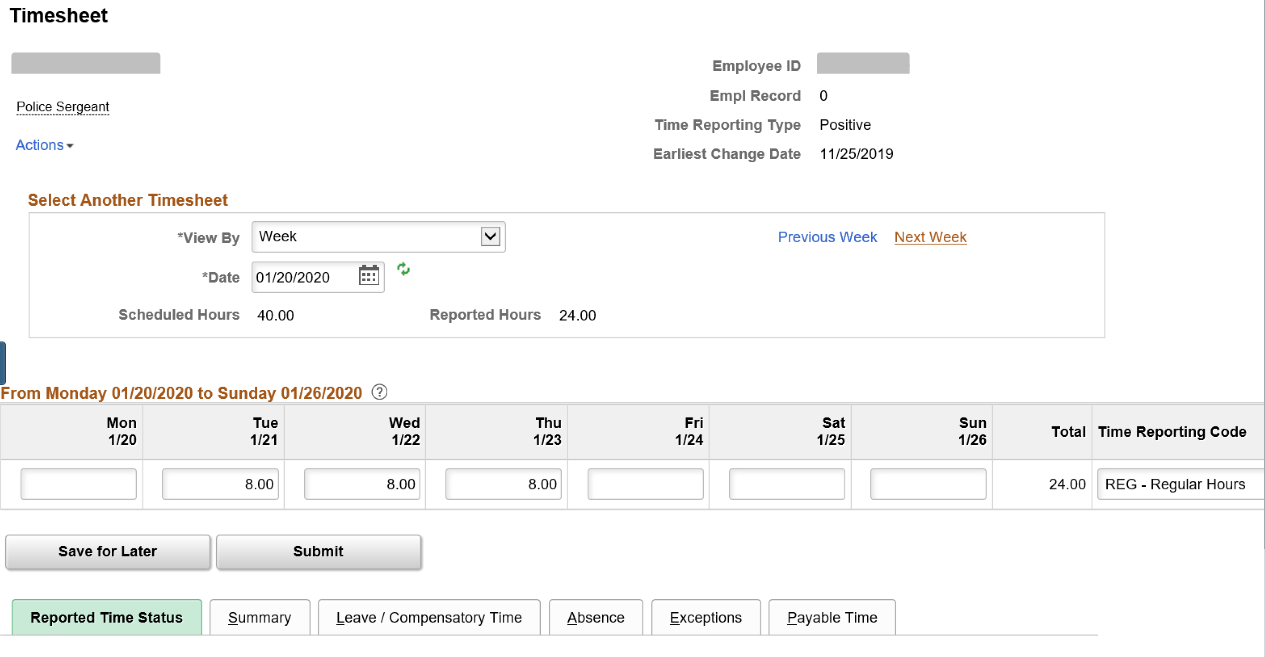
be created

* Cardinal allows users to define absence days as full or partial
* Salaried employees with a Variable Work Schedule **must** always use partial days
* Absence events must be forecasted prior to submission

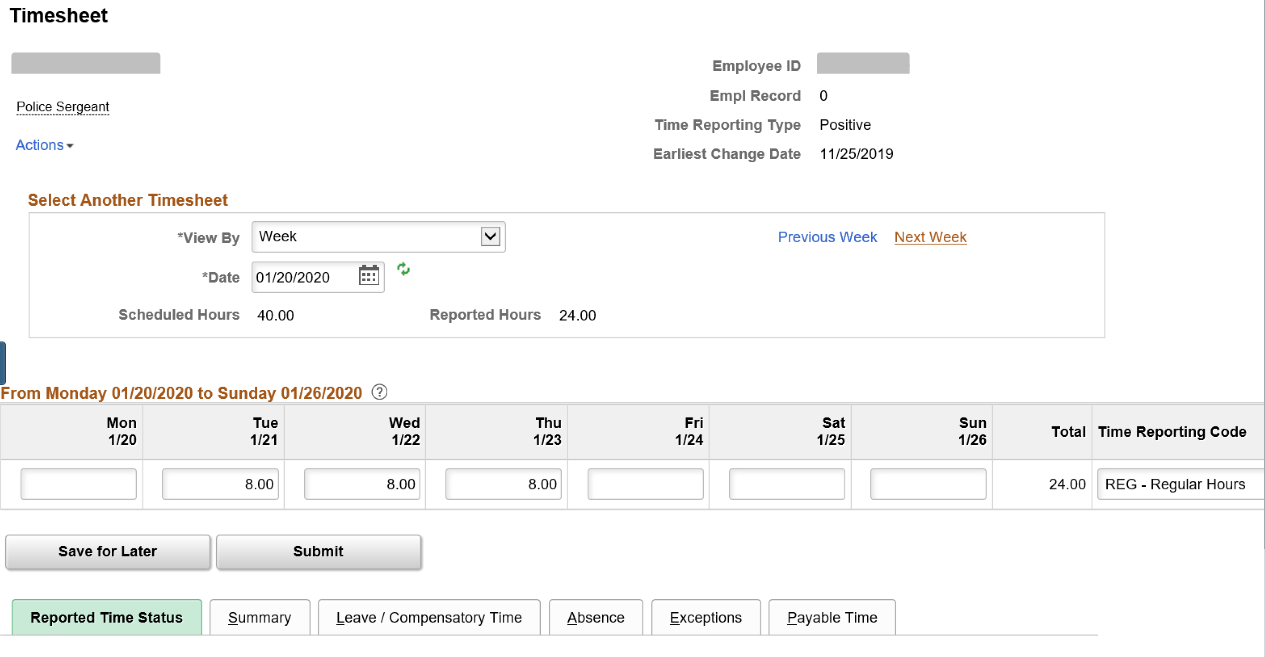
Creating an Absence Event:

1. Navigate to the employee’s Timesheet.

The **Timesheet** page displays.

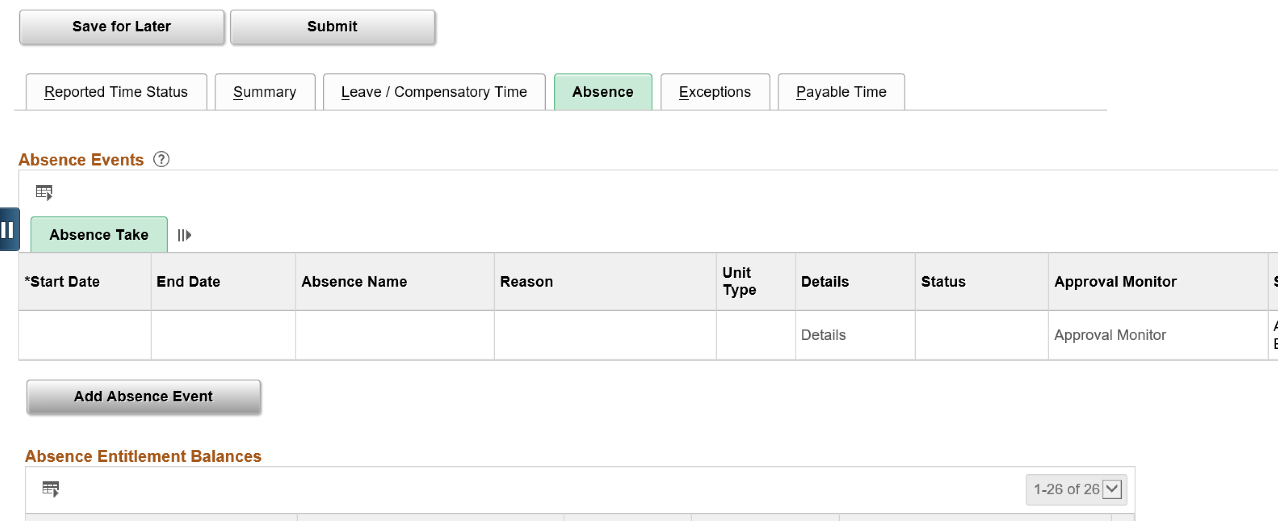


1. Ensure that the correct Timesheet (dates) is displayed. Use the **Date** field, **Previous Week** link, or **Next Week** link within the **Select Another Timesheet** section as needed to navigate to the correct Timesheet.



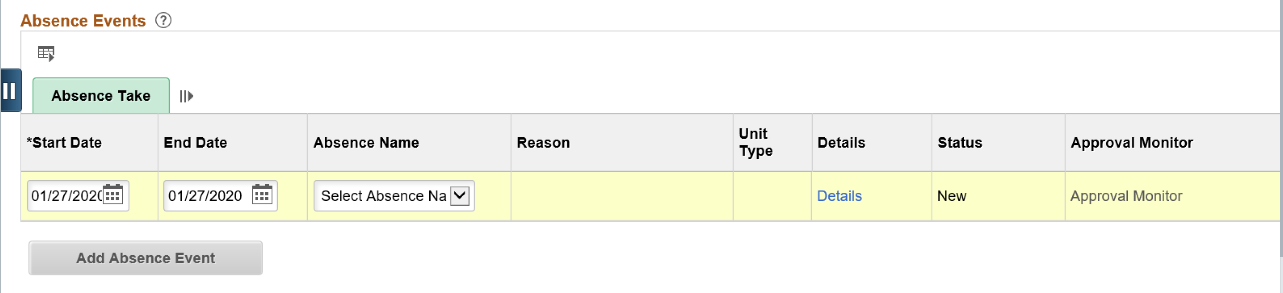
1. Click the **Absence** tab.

The **Absence** tab displays at the bottom of the page.



1. Click the **Add Absence Event** button.

The **Absence** tab refreshes.



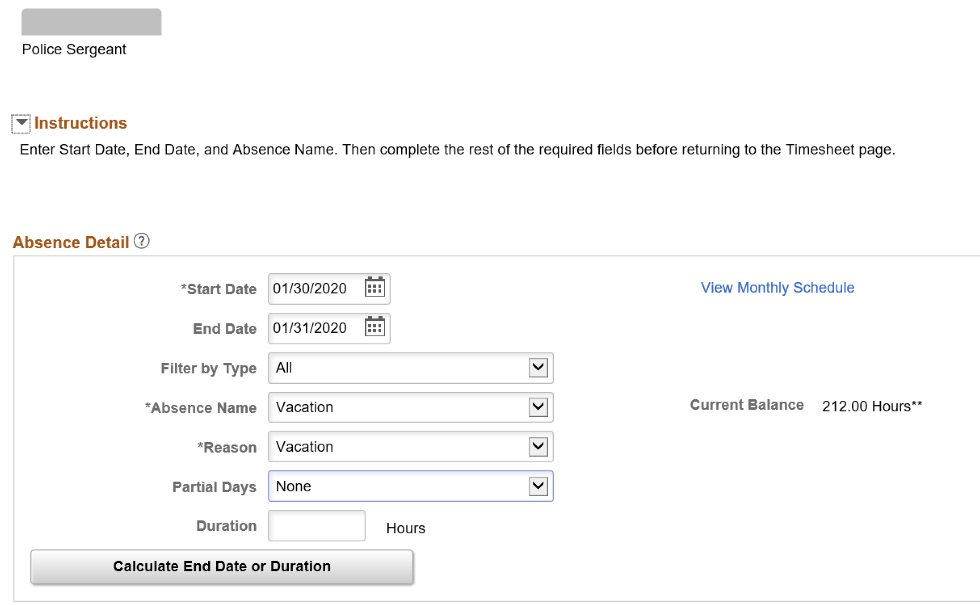
1. The first row within the Absence Take grid populates with defaulted data. Notice that both the **Start Date** and the **End Date** fields default to the first day for the Timesheet. Update the start date as needed.
2. Update the end date as needed.
3. Select the applicable absence type using the **Absence Name** dropdown button.

The page refreshes.



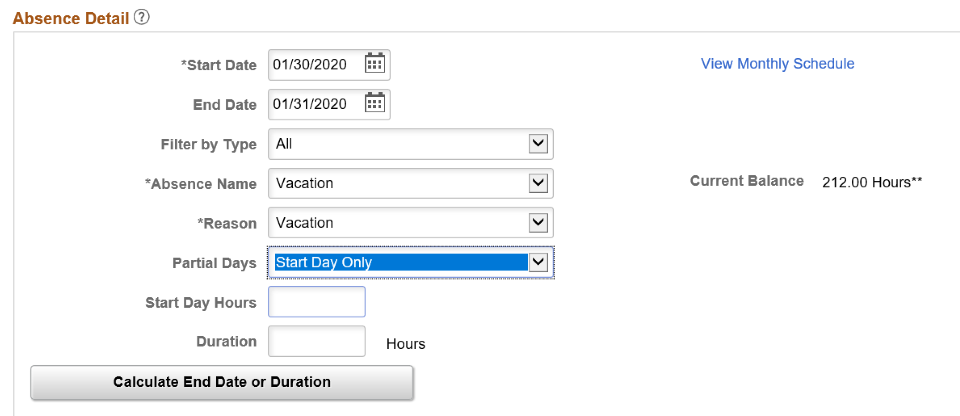
1. Select the applicable absence reason using the **Reason** dropdown button.
2. Click the **Details** link.

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

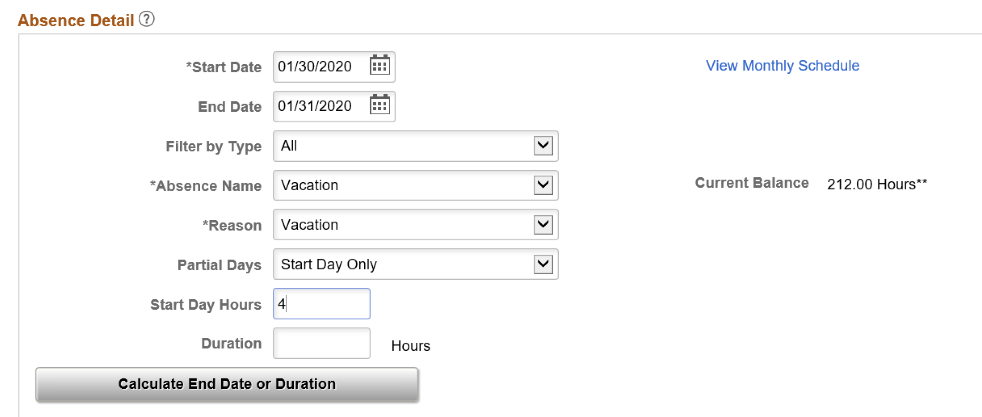


1. The Start Date, End Date, Absence Name, and Reason fields default based on the information previously entered. Update as needed.
2. The **Partial Days** field defaults to “None”. Select the applicable partial day option as needed using the dropdown button provided.

The page refreshes if a partial days option is selected. If no partial days option is selected, skip to Step 13.

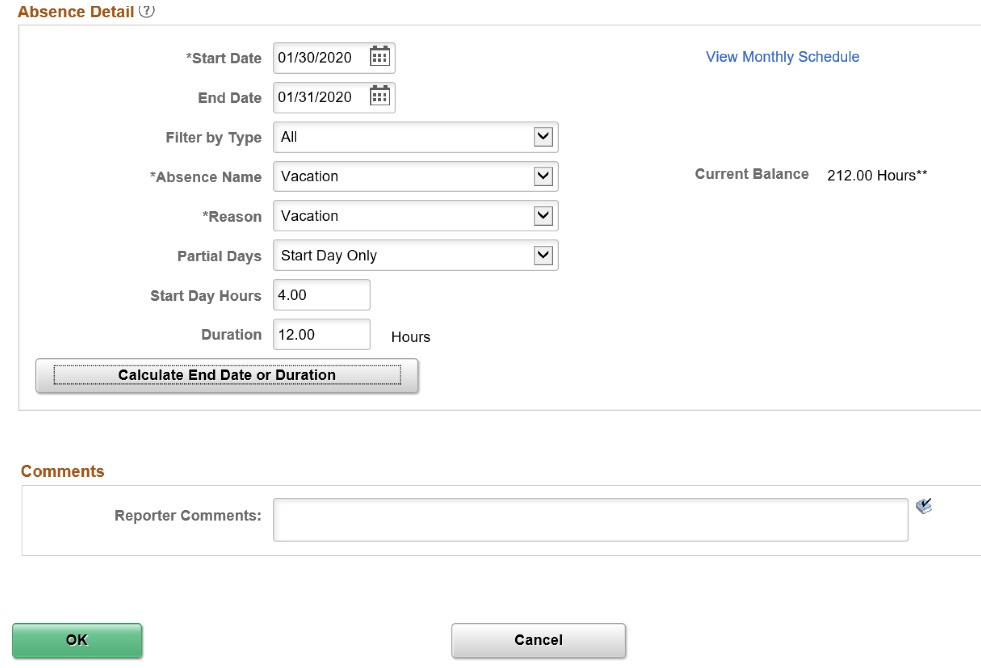


1. Enter the applicable number of hours in the corresponding partial days hours field.



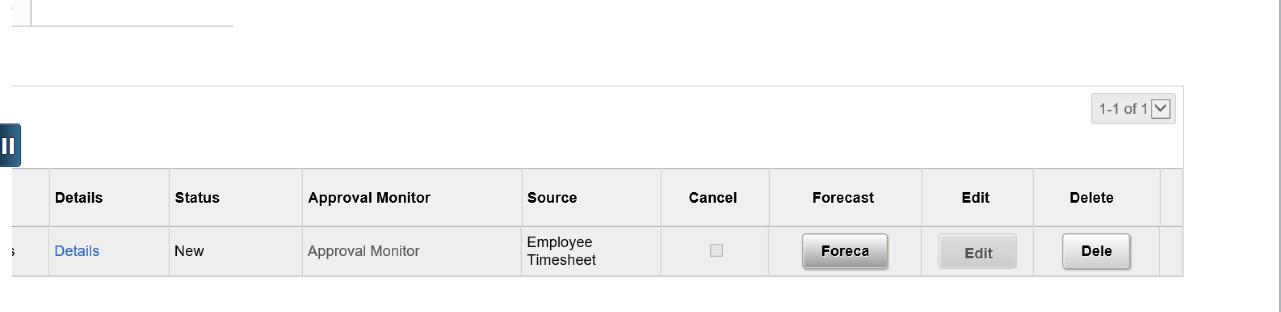
1. Click the **Calculate End Date or Duration** button.

The page refreshes.



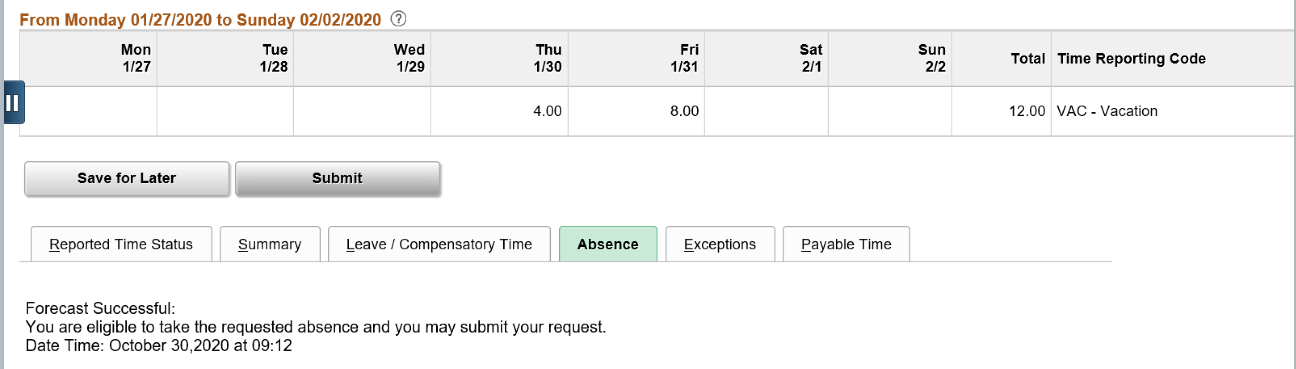
1. The **Duration** field calculates and displays the applicable number of hours.
2. Optionally enter comments in the **Reporter Comments** field.
3. Click the **OK** button.

The **Timesheet** page redisplays.



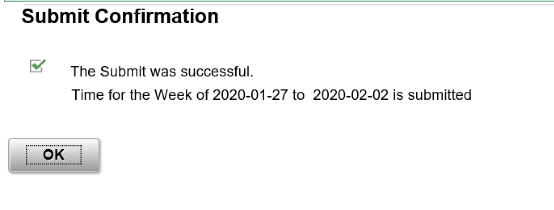
1. Click the **Forecast** button.

The page refreshes.



1. Upon successful forecasting, a “Forecast Successful” message displays. Click the **Submit** button.
2. Click the **Submit** button to submit the Timesheet for approval and processing.

The **Submit Confirmation** page displays.



1. Click the **OK** button.

## Reforecasting a Future Absence Event

Complete the following steps to reforecast (recheck) a future absence event:

1. Navigate to the applicable Timesheet and click the **Absence** tab
2. Verify that the absence event displays in the **Absence Take** grid
3. Click the **Forecast Results** tab
4. Review the **Forecast Value** field. If the forecast value is “Eligible”, there is still a sufficient balance for the absence event. If the forecast value is “Ineligible”, continue with Step 5
5. Click the **Forecast Details** link
6. Review the Absence Forecast Results page to identify the number of hours that will be paid and the number of hours that will be unpaid if the Timesheet is processed without any updates made to the absence event

Reforecasting Example

Today is March 28. In January, you had a Personal Leave balance of 24 hours. At that time, you entered a future absence event for a trip you are taking in April. You used the absence type of Personal Leave and the duration for the absence event is 24 hours. At the time of creation, the absence event forecasted successfully because you had a sufficient balance, and the absence event was subsequently approved.

In February, you had to take 2 days off unexpectedly. You created an absence event for the 2 days (16 hours) and used the Personal Leave absence type. The absence event was approved. You took the 2 days off, and the corresponding Timesheet was processed. This reduced your balance for Personal Leave to 8 hours.

You no longer have a sufficient balance for your planned absence event in April. If you do not take any action before the time of that absence event, the Timesheet will process with 8 hours of Personal Leave (your remaining available balance) and the remaining 16 hours will be processed as **LNP** (Pay Docking) which means you will not be paid for those 16 hours.

In this scenario, you need to re-check your April absence event which will allow you to identify this issue and avoid the pay docking by completing one of the following:

* Canceling the April absence event
* Updating the April absence event to change the duration or change the absence type to one where

you have a sufficient balance

Updating an Absence Event:

Complete the following to update an absence event:

1. Navigate to the applicable Timesheet and click the **Absence** tab
2. Click the **Edit** button for the applicable absence event within the **Absence Take** grid
3. Make the required updates
4. Forecast the absence event if required for the absence type
5. Click the **Submit** button

**Deleting/Canceling Absence Events**:

Absence events that are no longer required can be deleted or canceled based on the following guidelines:

If the absence event has not been forecasted or submitted, simply click the **Delete** button within the **Absence Take** grid

If the absence event has already been forecasted, but has not yet been approved, the absence event can be cancelled by completing the following:

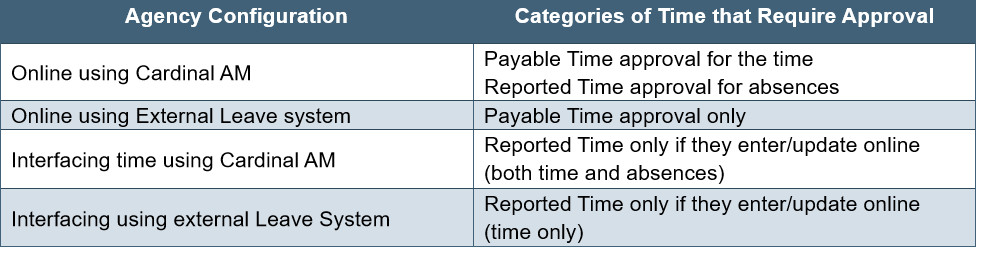
1. Navigate to the applicable Timesheet and click the **Absence** tab
2. Click the **Edit** button for the applicable absence event within the **Absence Take** grid
3. Select the **Cancel** checkbox
4. Click the **Submit** button

**Note**: If the absence event has already been approved, the employee cannot cancel it. In these cases, contact the Supervisor or an Absence Management Administrator to cancel the absence event.

# Time and Absence Approval

## Agency Configuration (Use of Cardinal)

The Agency’s configuration, or use of Cardinal, determines the categories of time that require approval. The table below shows the type of time that needs approval based on Agency configuration:



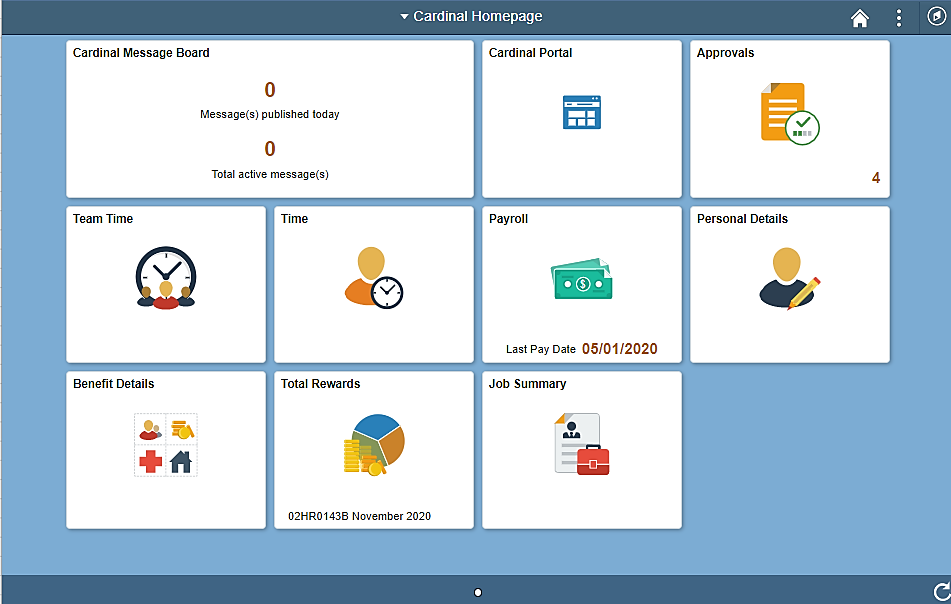
**Note**: For Agencies interfacing time, these transactions are considered approved in the agency system and only require approval in Cardinal if adjustments are made in Cardinal. As a general rule, in order to the keep information sync, interfacing Agencies should make adjustments to time in the Agency system and re-upload the information to Cardinal.

Approving Time and Absences:

Approvals in Cardinal for Reported or Payable time are done using the **Approvals** tile.

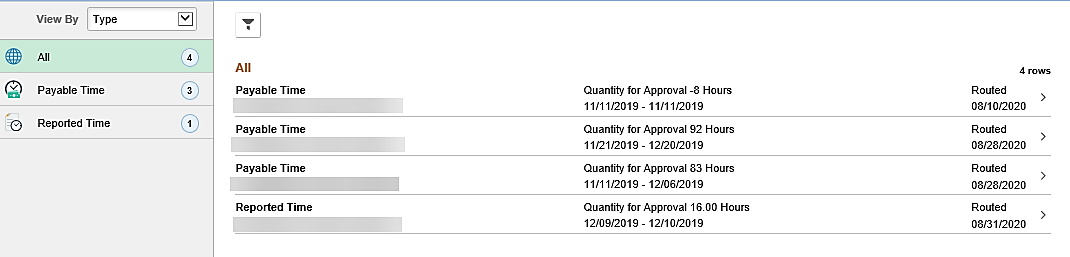
1. Log into Cardinal HCM.

The **Cardinal Homepage** displays.



1. Click the **Approvals** tile. The **Approvals** tile is on the **Cardinal Homepage** and indicates the number of items awaiting approval (both time and absences).

The **Approvals** page displays.

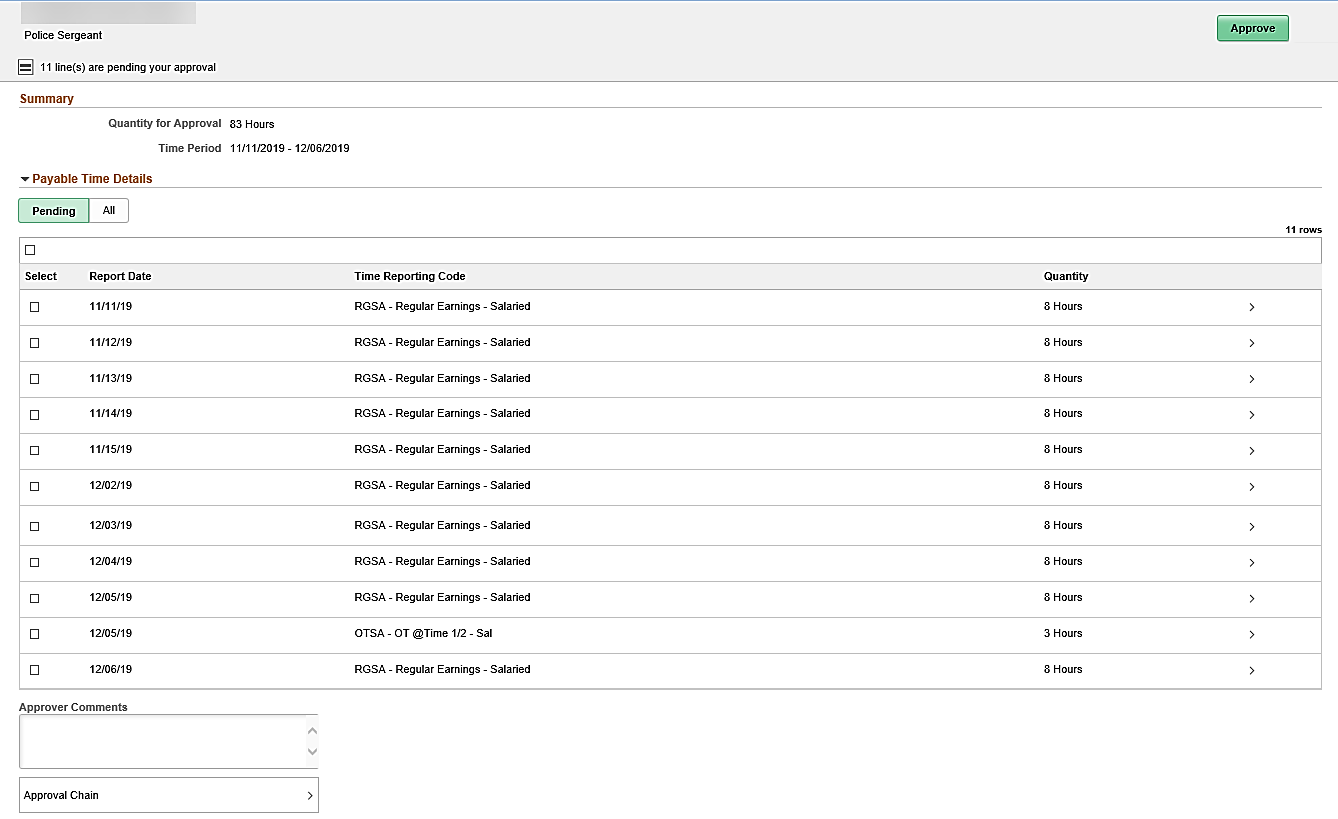


The left navigation menu displays the following:

* **All** – The total of all items (both reported and payable) that require approval
* **Payable Time** – The total number of payable time items that require approval
* **Reported Time** – The total number of reported time items that require approval

1. Click the applicable line item to review the time or absence item.

The **Payable Time** or **Reported Time** page displays for the applicable item.



The **Summary** section at the top of the page includes:

* + **Quantity for Approval** – Total hours for approval
  + **Time Period** – The pay period of the time that requires approval

The **Payable Time Details** section includes two tabs:

* + **Pending** – Displays all time pending approval
  + **All** – Displays all time (both pending and time that has been approved for the applicable pay period)

Within the **Payable Time Details** section, the displayed time is broken out into lines that correspond with the lines on the **Timesheet** page (day and type). The overview information provided for review is:

* + **Report Date** – Date the time entered
  + **Time Reporting Code** – The TRC associated to the date and hours in the row
  + **Quantity** – Number of hours

While this section displays the key information needed to review and approve time, you can access additional details information and the employee’s Timesheetas needed by completing the following steps.

1. Click the applicable line item.

The **Approval Line Detail** page displays for the applicable line item.



The **Approval Line Detail** page displays the **Report Date**, **Time Reporting Code**, and **Quantity** from the previous page as well as the following additional fields:

* + **Estimated Gross**: The estimated gross pay associated with the number of hours and TRC
  + **Offset**:This field indicates if the time is an offset. A negative number of hours for **Quantity**

indicates that there is an offset, meaning there was a change made to time previously approved

* **No**: No offset
* **Yes**: Offset and the **Quantity** number will be negative

Offset example:



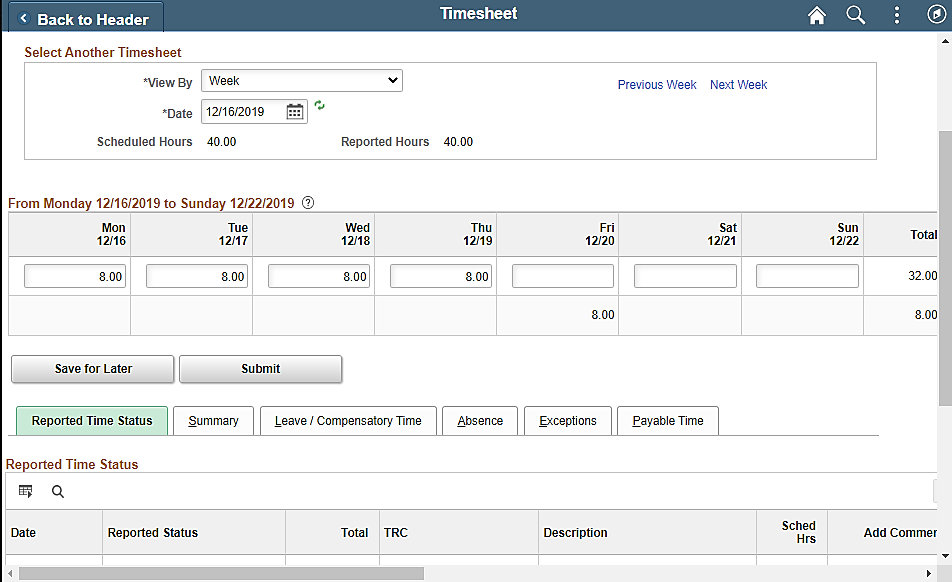
**Note**: All Offsets (negative hours) should be approved so that the employee’s hours are accurate.

The **Adjust Reported Time** link can be used to access the corresponding **Timesheet** if you need to:

* + Make any adjustments to the employee’s time
  + View additional time details such as the ChartField distribution

1. Click the **Adjust Reported Time** link.

The **Timesheet** page displays.



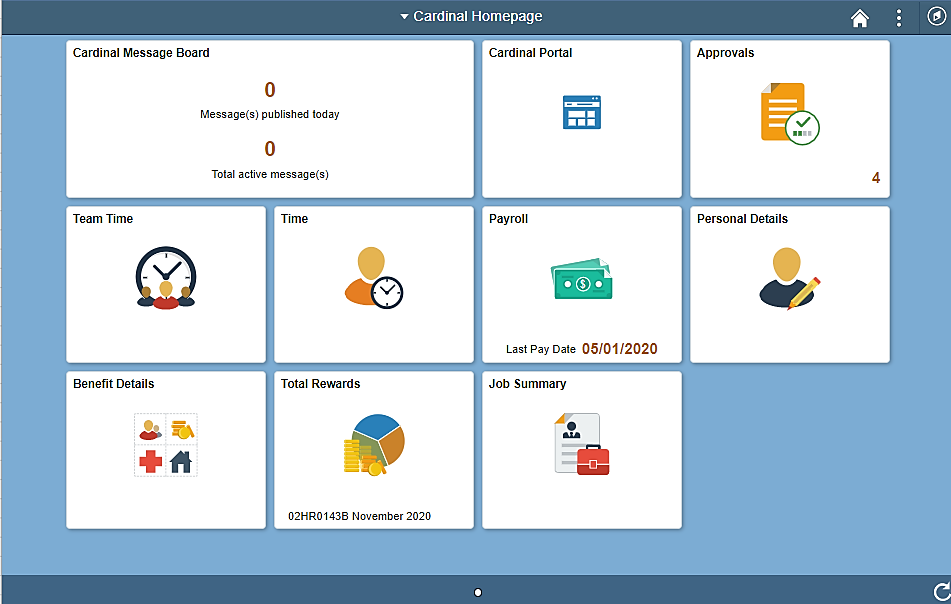
**Note**: The Timesheet defaults to the current week and not necessarily the week with the time pending approval. You may need to change the **View By** selections and refresh as needed.

1. Review any specific data you need to see on the **Timesheet** or make any necessary adjustments.

**Note**: If you make an adjustment on the **Timesheet** grid, be sure to click the **Submit** button. Changes to time will not be available immediately for approval. The changes must be processed by Time Administration to route for approval. Check periodically to approve any changes made. Absences are available for immediate approval once they have been submitted.

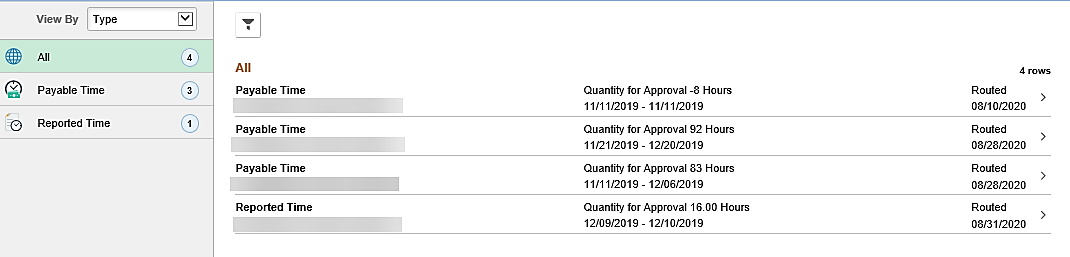
1. Click the **Home** icon to return to the **Cardinal Homepage**, after reviewing the information or making adjustments.

The **Cardinal Homepage** redisplays.



1. Click the **Approvals** Tile.

The **Approvals** page redisplays.



1. Click the applicable line item to approve.

The **Payable Time** or **Reported Time** page displays for the applicable item.



1. Select the lines that are ready to be approved.

The bottom of the page contains the following fields:

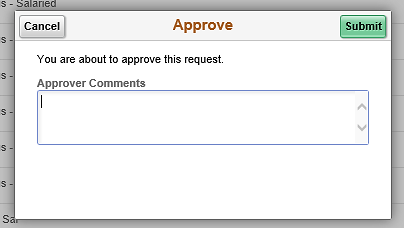
* + The **Approver Comments** field allows you to enter comments, if applicable, regarding your approval

**Note**: These comments will not be available on any reports.

* + The **Approval Chain** link will open a pop-up window that displays with the approver’s name for each line on the page

1. Click the **Approve** button.

The **Approve** page displays in a pop-up window.



1. Enter comments as needed in the **Approver Comments** field.

**Note**: These comments are not visible on any reports.

1. Click the **Submit** button.