Managing Absence Balances Overview

There are various reasons why an entitlement balance adjustment may be required. Some examples include:

- An employee is granted a special absence balance that needs to be added (e.g., Annual Leave Incentive, Employee Recognition, Educational Leave)
- An employee transfers from another state Agency and is bringing their absence balances to the new Agency
- An exception is granted to system generated entitlements
- An Absence Event was voided on the **Update Time Status** page
- Leave balances need to be zeroed out when an employee terminates
- An employee is donating leave or receiving donated leave

Reminders:

- AM Administrators can view the Absence Balance Calculations the following day after the nightly Absence Calc job processes Absence Events and adjustments
- Balances viewed under the **Team Time** tile or the **Time** tile reflect balances as of the last closed leave period. The leave period is closed on the salaried pay date
- For further information about absence calculations, see the Job Aid titled **TA374 Results by Calendar Group/Calendar**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

The Absence Calculation Process has a retro-processing limit of 1 year. AM Administrators have access to modify the **Balances** page for leave periods within 1 year of the current open leave period and view-only access to leave periods greater than 1 year from the current open leave period.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades. Reorganized layout.
4/2/2026	Added a new section on Zeroing Out Balances using the Leave Balance Zero-Out Page.
8/19/2025	Added a new section on how to Manage Recognition Leave.
3/1/2025	Baseline.

Getting Started

Absence Balances can be adjusted manually following the steps in this job aid. Some balances can also be adjusted through a mass upload. See the **TA792 Leave Balance Adjustment Mass Upload Template** for more information.

For employees transferring from one Agency to another Agency or for adjusting balances for a transfer employee, refer to the Managing Leave for Agency Transfers section of this Job Aid.

Prior to managing Absence balances manually or through mass upload, have the following information available:

- The Employee's Pay Group, which can be found on the employee's **Job Actions Summary** page
    - Navigate to the **Job Actions Summary** page using the following tiles: **Manage Human Resources > Manage Job**
- The Pay Period End Date: identify the Pay Period end date for the Pay Period in which the Absence Balance Entitlement is to be effective
- Any required HR Documentation (per Agency procedures)

Entering a New Absence Entitlement

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>

Navigate to the **Absences** page by clicking the **TA WorkCenter** tile.

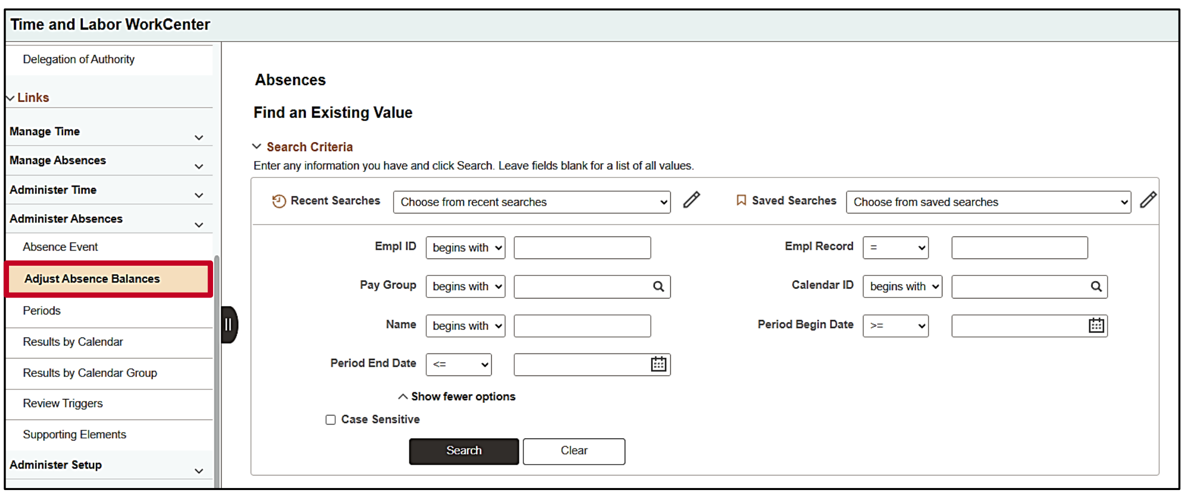
</td></tr>
<tr><td></td><td>

For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.

</td></tr>
<tr><td>2.</td><td>

Use the following navigation in the WorkCenter: **Links > Administer Absences > Adjust Absence Balances**

Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles.



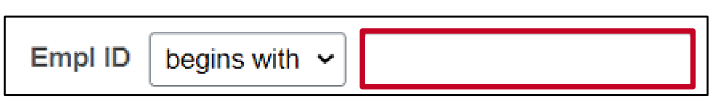
</td></tr>
<tr><td></td><td>

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

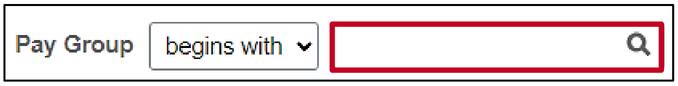
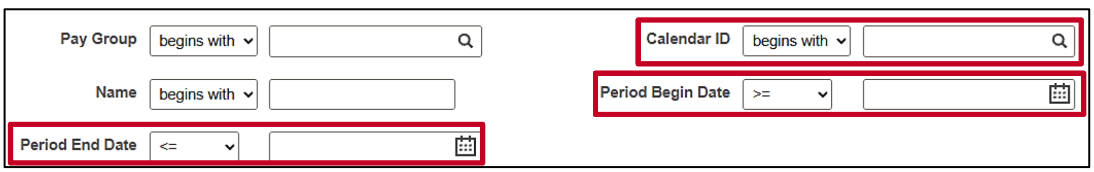
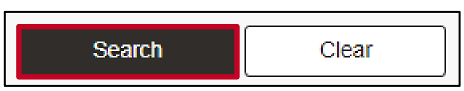
</td></tr>
<tr><td>3.</td><td>

Enter the employee's Employee ID in the **Empl ID** field.

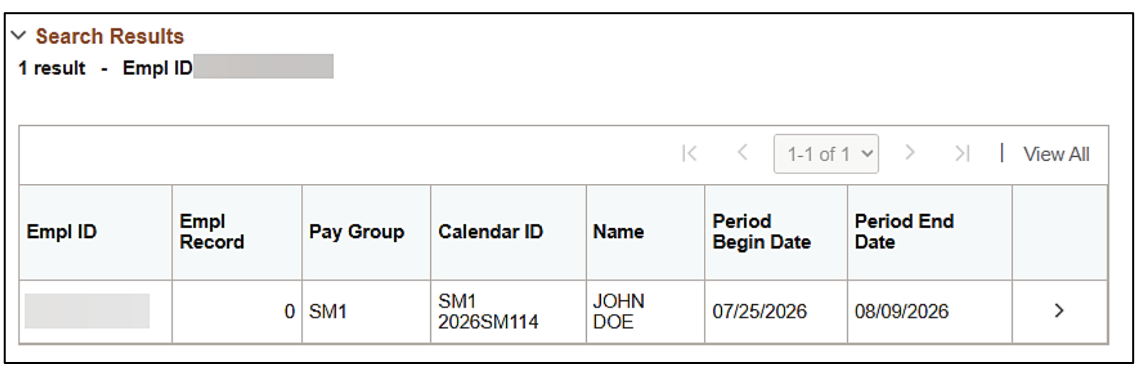
Note: Users can also search for an employee by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.



</td></tr>
</table>

Step	Action
4.	Click the **Pay Group Look up** icon to select the employee's Pay Group. **Note**: Ensure that the selected Pay Group is consistent with the employee's **Job Actions Summary** page for the same timeframe. 
5.	Select the applicable value for one of the following fields: • **Calendar ID**: Parameter for the Absence Calculation process that identifies the Pay Period in which the new entitlement should be made effective. It can be a past, current, or future Pay Period. Click the **Calendar ID Look up** icon and select the applicable Pay Period. • **Period Begin Date**: The Pay Period begin date when the new entitlement should be effective. Click the **Period Begin Date Calendar** icon and select the applicable Pay Period begin date. • **Period End Date**: The Pay Period end date when the new entitlement should be effective. Click the **Period End Date Calendar** icon and select the applicable Pay Period end date. 
6.	Click the **Search** button. 

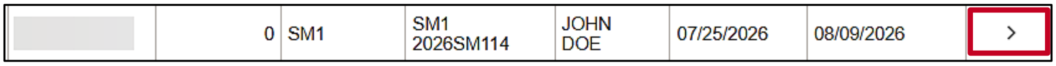
The Search Results (Calendar IDs available for the employee based on the data entered) display in the **Search Results** section.



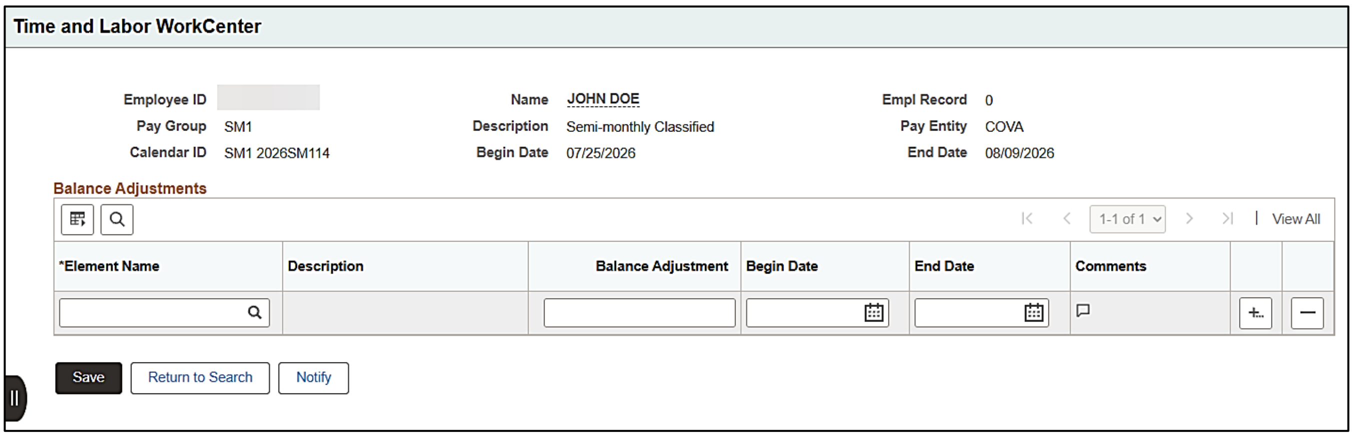
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>
Click the applicable **Drill in** (**>**) icon based on the effective date of the change.

Note: Verify that the Pay Group is consistent with the employee's **Job Actions Summary** page. Select the Pay Period with the correct Pay Period begin date and end date wherein the balance should be available for the employee. Selecting the incorrect Calendar ID may result in the incorrect processing of the adjustment.

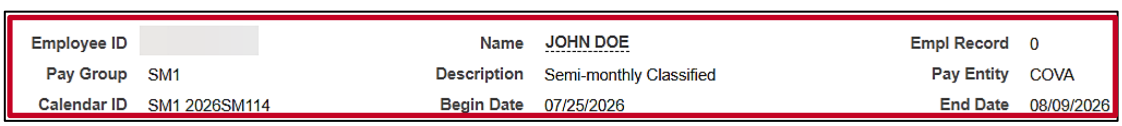
Balance adjustments should not be entered in calendars that end in "00" or "F1" as these are not regular semi-monthly leave period calendars.



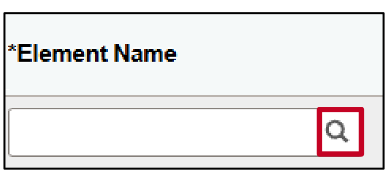
</td></tr>
<tr><td colspan="2">
The **Absences** page displays for the applicable Calendar ID.



</td></tr>
<tr><td>8.</td><td>
Review the information in the **Header** section to confirm that the correct selection was made.

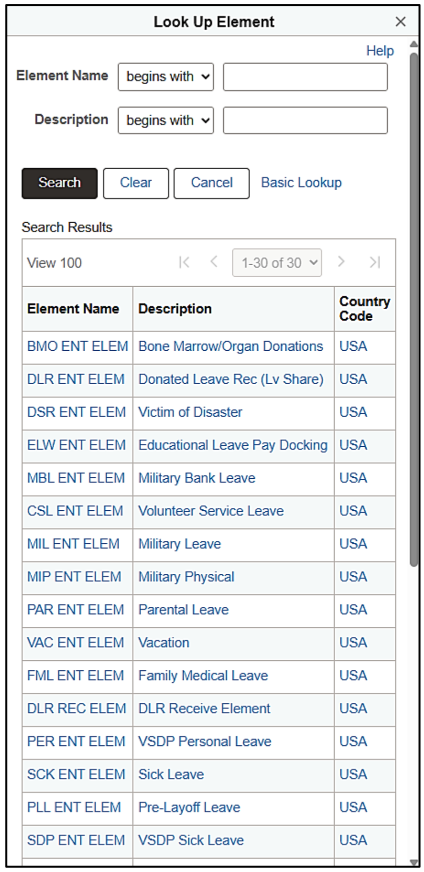


</td></tr>
<tr><td>9.</td><td>
Click the **Element Name Look up** icon.



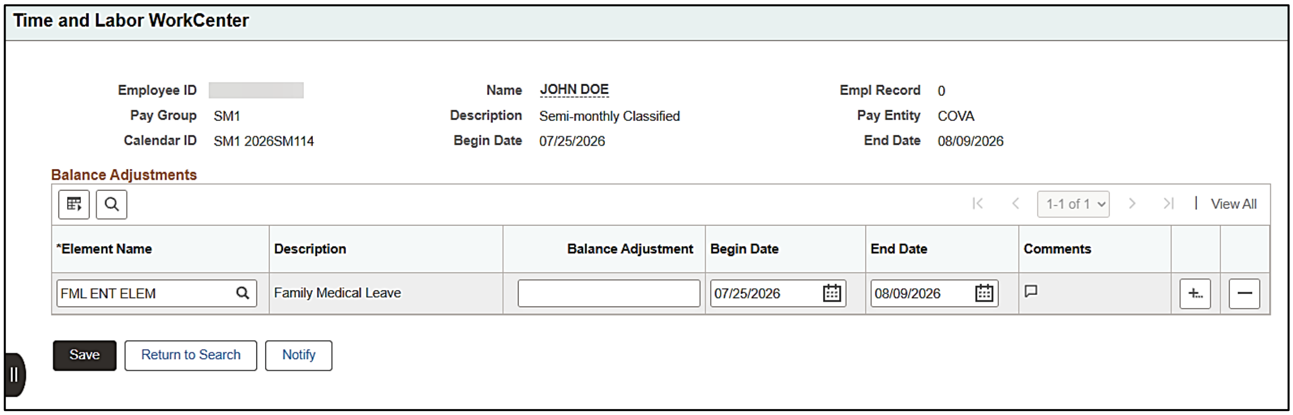
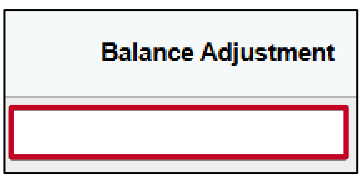
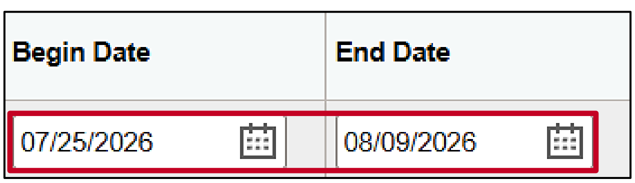
</td></tr>
</table>

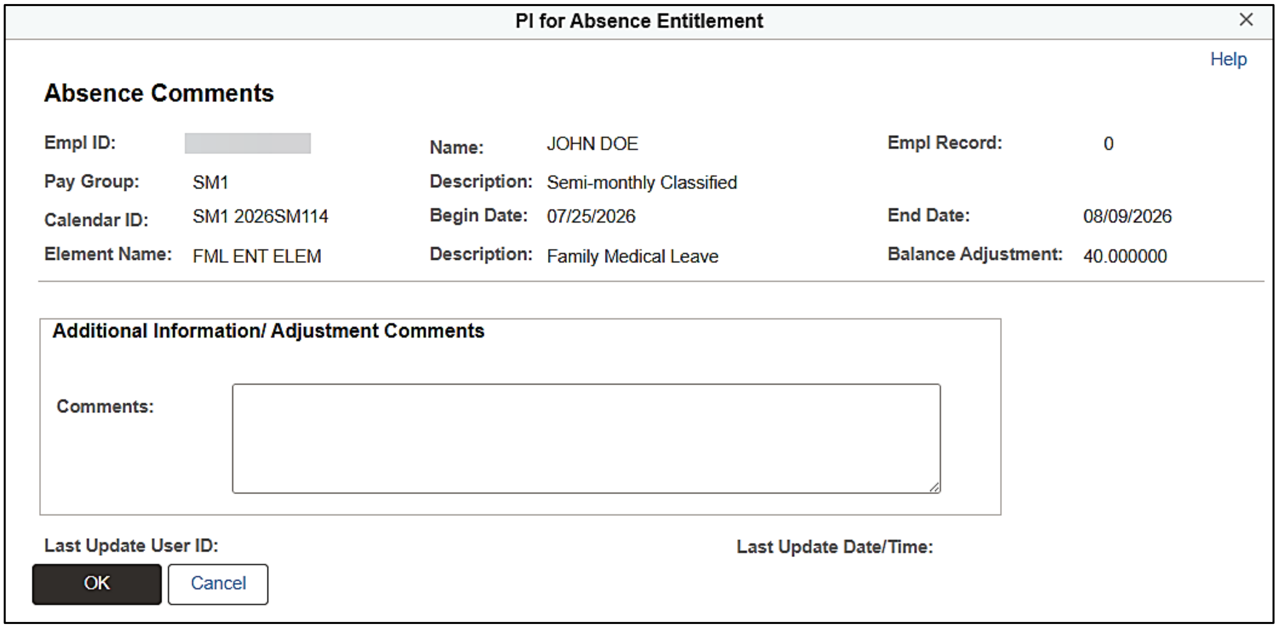
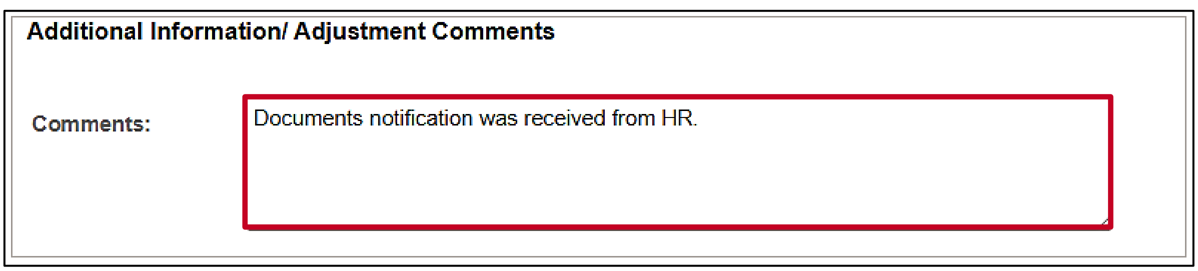
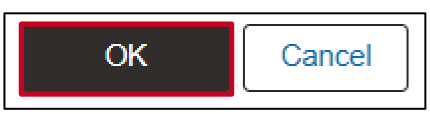
Step	Action
	The **Look Up Element** page displays in a pop-up window.



Step	Action
10.	Select the applicable Entitlement Type (Element Name) by clicking the corresponding link in the **Element Name** or **Description** column.

Element Name	Description	Country Code
BMO ENT ELEM	Bone Marrow/Organ Donations	USA
DLR ENT ELEM	Donated Leave Rec (Lv Share)	USA
DSR ENT ELEM	Victim of Disaster	USA
ELW ENT ELEM	Educational Leave Pay Docking	USA
MBL ENT ELEM	Military Bank Leave	USA
CSL ENT ELEM	Volunteer Service Leave	USA
MIL ENT ELEM	Military Leave	USA
MIP ENT ELEM	Military Physical	USA
PAR ENT ELEM	Parental Leave	USA
VAC ENT ELEM	Vacation	USA
FML ENT ELEM	Family Medical Leave	USA

Step	Action
	The **Absences** page redisplays with the selected element name, and the **Description** field defaults based on the element name selected. 
11.	Enter the number of hours for the entitlement in the **Balance Adjustment** field as a positive number. 
12.	The **Begin Date** and **End Date** fields default based on the Calendar ID previously selected. **Note**: Do not change these dates. If these dates do not reflect the Pay Period in which the absence balance adjustment is to be effective, click the **Return to Search** button and select the applicable Calendar ID. 
13.	Click the **Comments** icon in the **Comments** field. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The PI for Absence Entitlement page displays in a pop-up window.

</td></tr>
<tr><td>14.</td><td>Enter a brief comment in the Comments field regarding why the adjustment is being made.
Note: Do not include any PII in the comments.

</td></tr>
<tr><td>15.</td><td>Click the OK button.

</td></tr>
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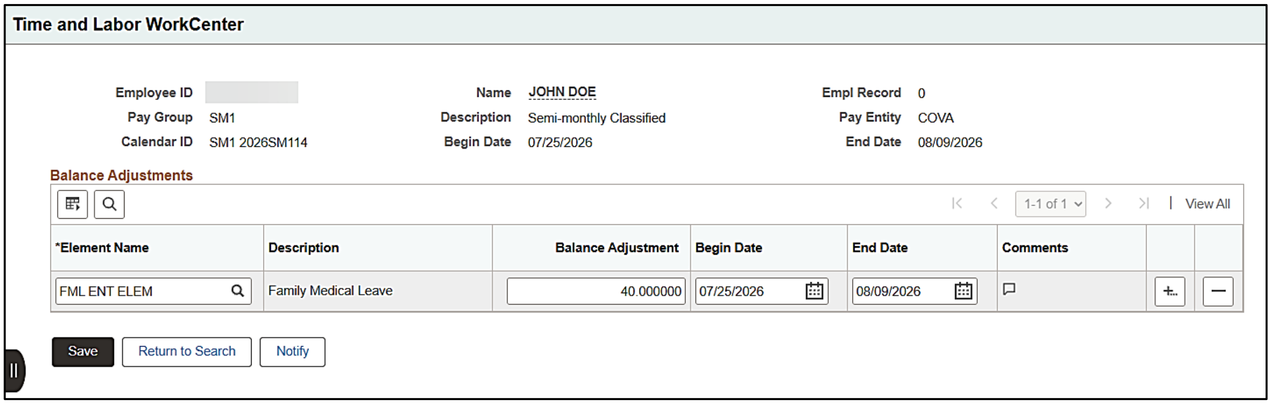
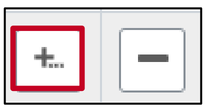
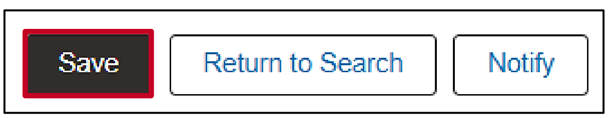
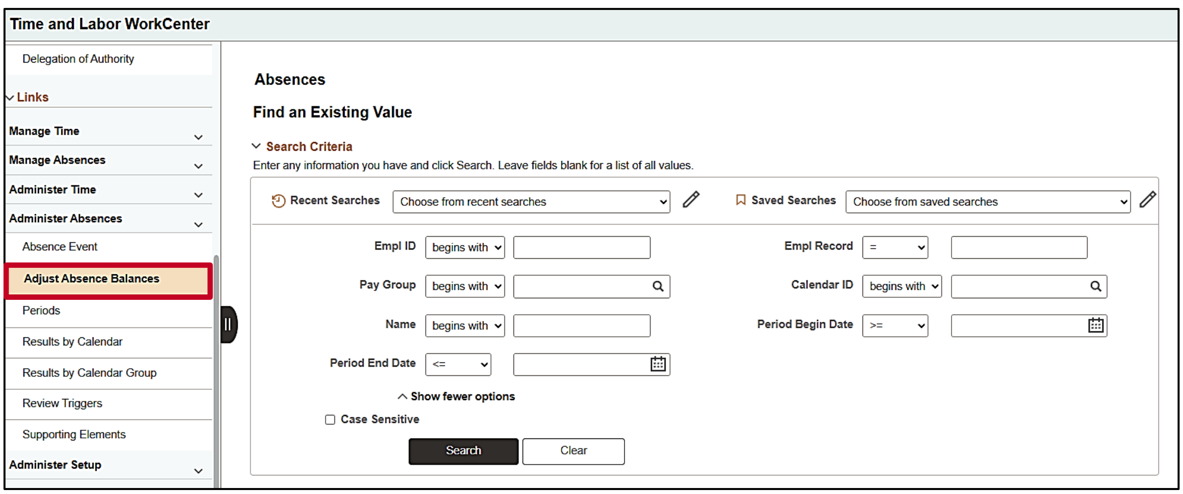
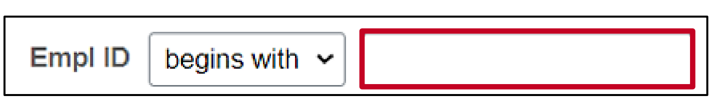
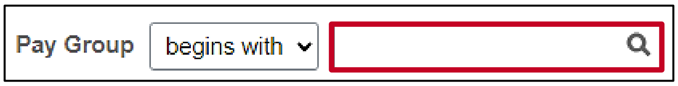
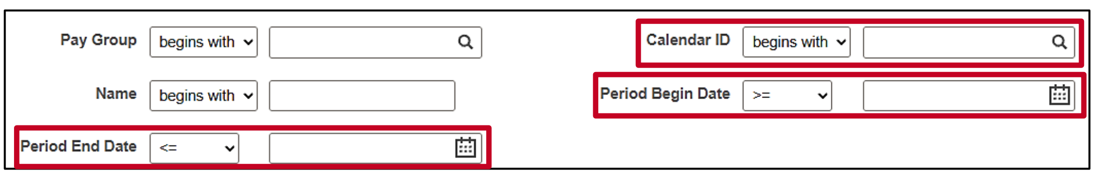
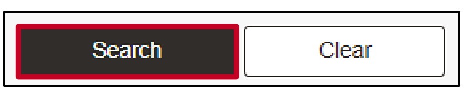
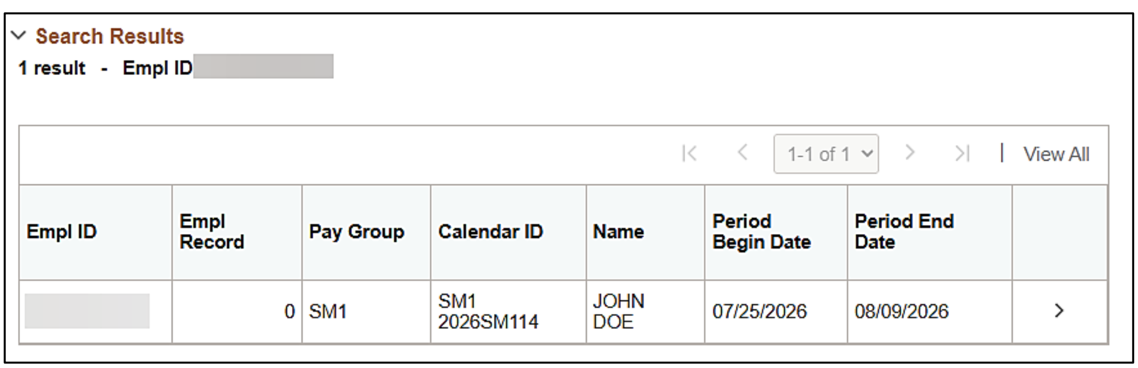
Step	Action
	The **Absences** page redisplays. 
16.	If additional Absence Entitlements need to be entered for the same Pay Period, click the **Add a New Row** (**+**) icon and repeat **Steps 9 – 15**. If not, proceed to **Step 17**. 
17.	Click the **Save** button. 
	Entitlements added in the current open Pay Period and prior Pay Periods will be available for use/forecasting immediately and will be reflected in the balance viewable on the **Results by Calendar/Calendar Group** pages after the nightly Absence Calculation Process runs.

Entering a New Absence Entitlement for Parental Leave

Step	Action
1.	Navigate to the **Absences** page by clicking the **TA WorkCenter** tile. 
ℹ	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Administer Absences > Adjust Absence Balances** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
3.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for an employee by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 

Step	Action
4.	Click the **Pay Group Look up** icon to select the employee's Pay Group. **Note**: Ensure that the selected Pay Group is consistent with the employee's **Job Actions Summary** page for the same timeframe. 
5.	Select the applicable value for one of the following fields: • **Calendar ID**: Parameter for the Absence Calculation process that identifies the Pay Period in which the new entitlement should be made effective. It can be a past, current, or future Pay Period. Click the **Calendar ID Look up** icon and select the applicably Pay Period. • **Period Begin Date**: The Pay Period begin date when the new entitlement should be effective. Click the **Period Begin Date Calendar** icon and select the applicable Pay Period begin date. • **Period End Date**: The Pay Period end date when the new entitlement should be effective. Click the **Period End Date Calendar** icon and select the applicable Pay Period end date. 
6.	Click the **Search** button. 

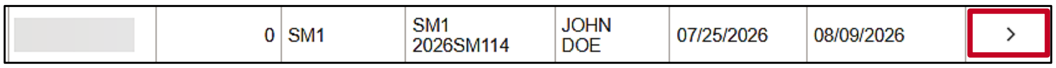
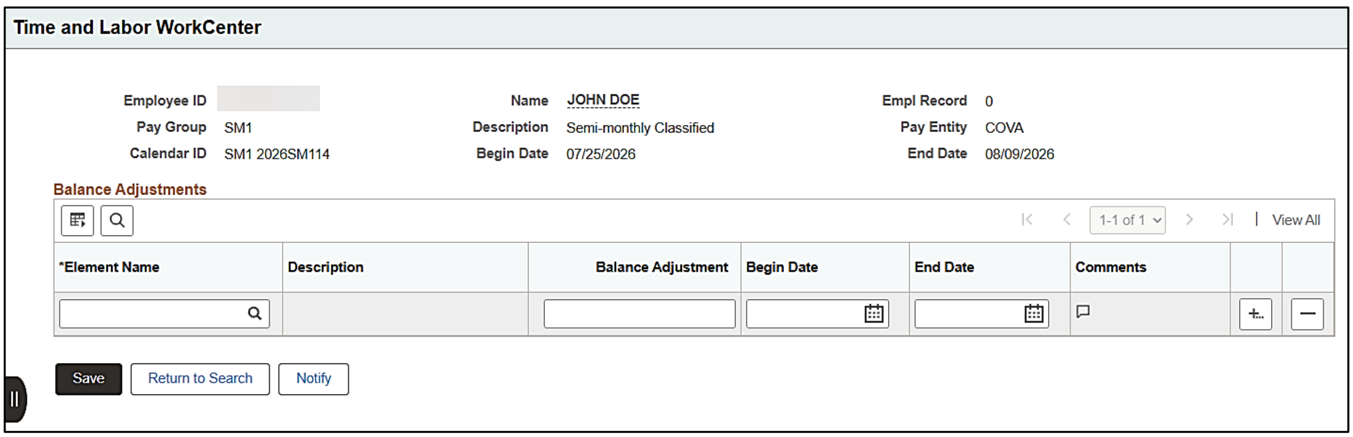
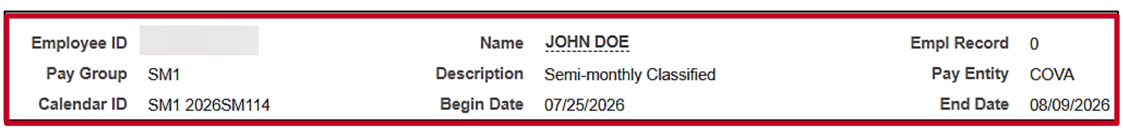
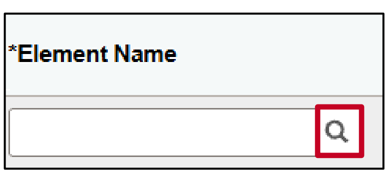
The Search Results (Calendar IDs available for the employee based on the data entered) display in the **Search Results** section.



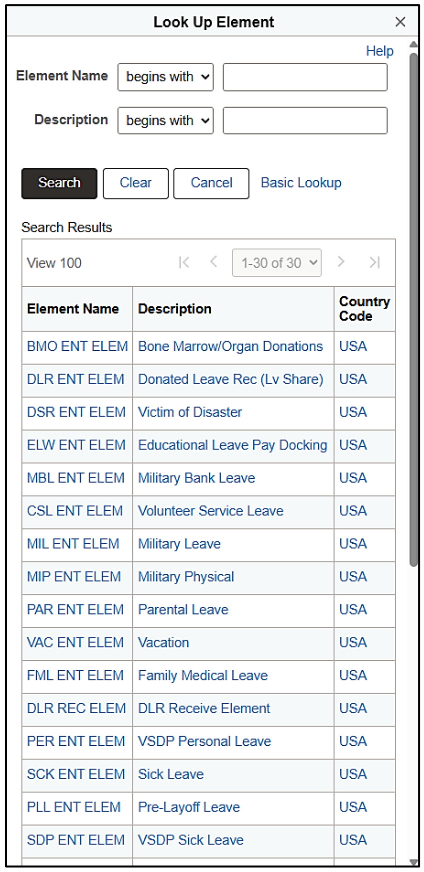
Empl ID	Empl Record	Pay Group	Calendar ID	Name	Period Begin Date	Period End Date	
	0	SM1	SM1 2026SM114	JOHN DOE	07/25/2026	08/09/2026	>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7.</td><td>Click the applicable Drill in (>) icon based on the effective date of the change.

Note: Verify that the Pay Group is consistent with the employee’s Job Actions Summary page. Select the Pay Period with the correct Pay Period begin date and end date wherein the balance should be available for the employee. Selecting the incorrect Calendar ID may result in the incorrect processing of the adjustment.

Balance adjustments should not be entered in calendars that end in “00” or “F1” as these are not regular semi-monthly leave period calendars.

</td></tr>
<tr><td colspan="2">The Absences page displays for the applicable Calendar ID.

</td></tr>
<tr><td>8.</td><td>Review the information in the Header section to confirm that the correct selection was made.

</td></tr>
<tr><td>9.</td><td>Click the Element Name Look up icon.

</td></tr>
</table>

Step	Action
	The **Look Up Element** page displays in a pop-up window.

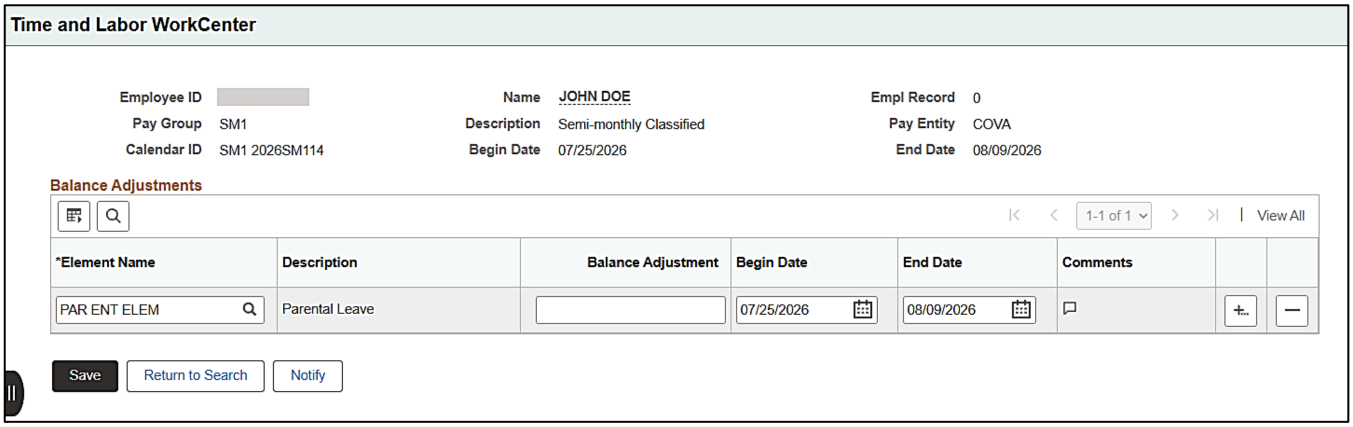


Step	Action
10.	Select the "PAR ENT ELEM" Entitlement Type by clicking the corresponding link in the **Element Name** or **Description** column.

Element Name	Description	Country Code
BMO ENT ELEM	Bone Marrow/Organ Donations	USA
DLR ENT ELEM	Donated Leave Rec (Lv Share)	USA
DSR ENT ELEM	Victim of Disaster	USA
ELW ENT ELEM	Educational Leave Pay Docking	USA
MBL ENT ELEM	Military Bank Leave	USA
CSL ENT ELEM	Volunteer Service Leave	USA
MIL ENT ELEM	Military Leave	USA
MIP ENT ELEM	Military Physical	USA
PAR ENT ELEM	Parental Leave	USA
VAC ENT ELEM	Vacation	USA
FML ENT ELEM	Family Medical Leave	USA

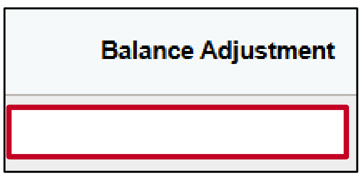
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

The **Absences** page redisplays with the selected element name, and the **Description** field defaults based on the element name selected.



</td></tr>
<tr><td>11.</td><td>

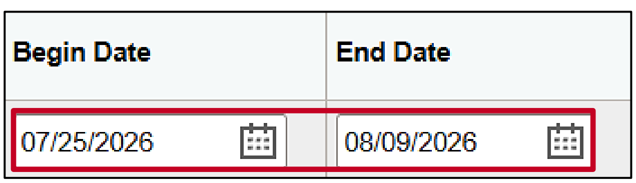
Enter “320” in the **Balance Adjustment** field as a positive number.



</td></tr>
<tr><td>12.</td><td>

The **Begin Date** and **End Date** fields default based on the Calendar ID previously selected.

Note: Do not change these dates. If these dates do not reflect the Pay Period in which the absence balance adjustment is to be effective, click the **Return to Search** button and select the applicable Calendar ID.

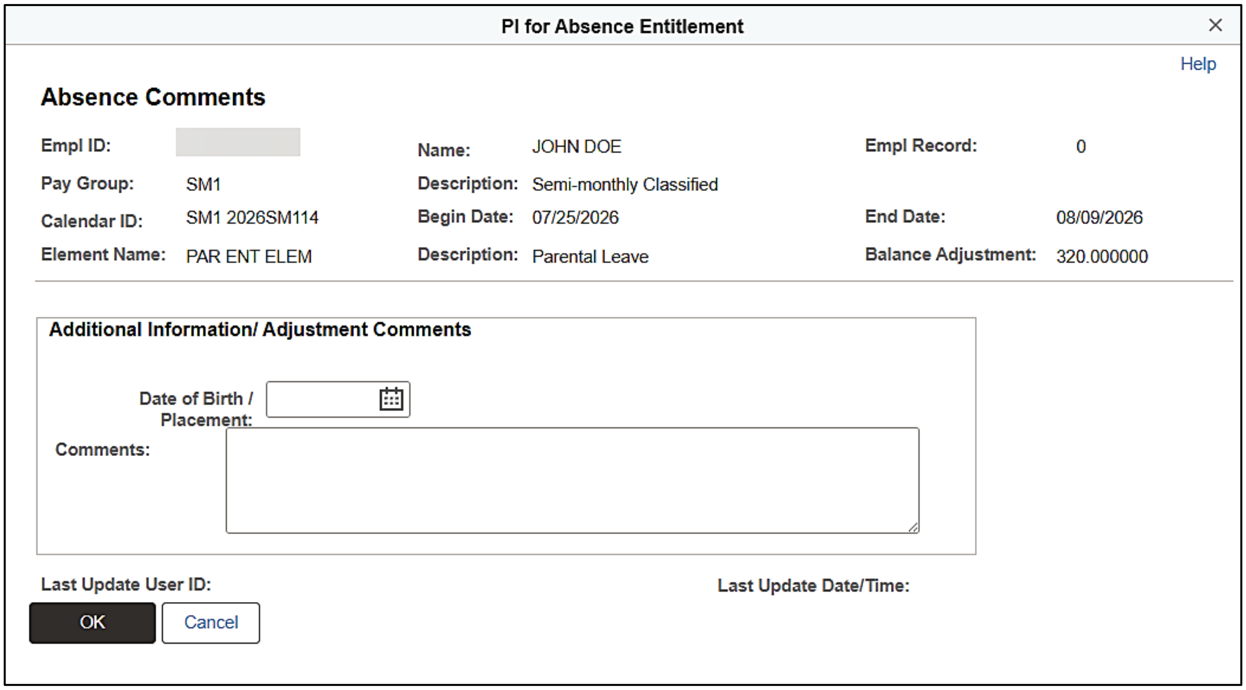


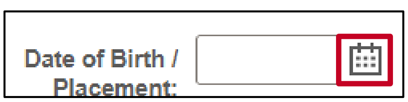
</td></tr>
<tr><td>13.</td><td>

Click the **Comments** icon in the **Comments** field.

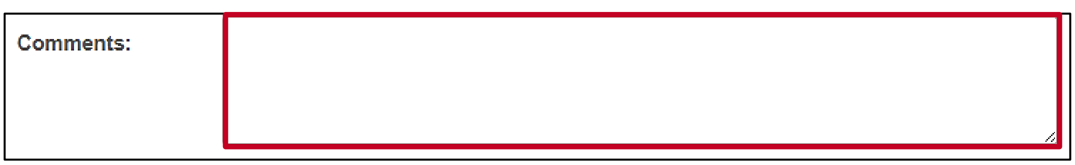
</td></tr>
</table>

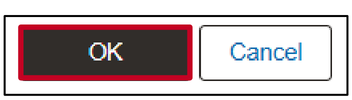
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The PI for Absence Entitlement page displays in a pop-up window.

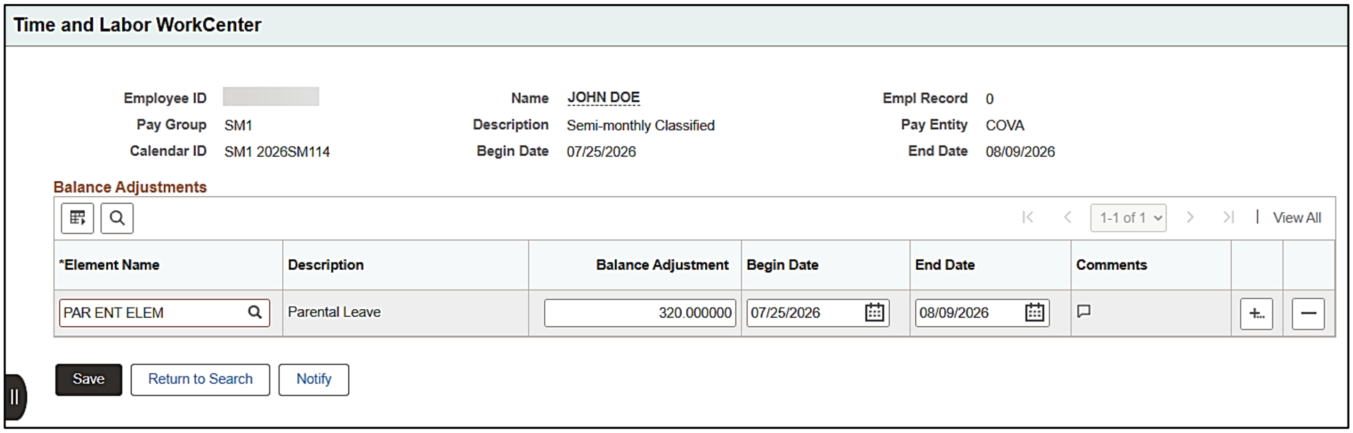
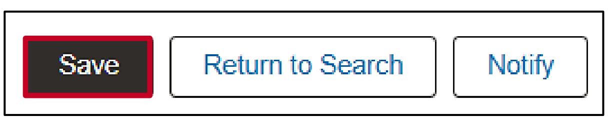

</td></tr>
<tr><td>14.</td><td>Click the Date of Birth / Placement Calendar icon and select either the date of birth or the date of placement.


</td></tr>
<tr><td>15.</td><td>Enter a brief comment in the Comments field regarding why the adjustment is being made.

Note: Do not include any PII in the comments.


</td></tr>
<tr><td></td><td>Enter a comment related to the birth date or the placement date based on information received from HR.</td></tr>
<tr><td>16.</td><td>Click the OK button.


</td></tr>
</table>

Step	Action
	The **Absences** page redisplays. 
	Unused Parental Leave hours expire automatically in Cardinal after 6 months. If an employee is terminated before the 6-month expiration, the remaining balance must be manually removed. The balance can be manually zeroed out by editing the original Parental Leave adjustment to reflect the number of hours the employee used (e.g., if the employee originally received 320 Parental Leave hours and has a remaining balance of 20 hours, the AM Administrator should edit the 320 hours to 300 hours for the original balance adjustment in the **Balance Adjustment** field).
17.	Click the **Save** button. 
	Entitlements added in the current open Pay Period and prior Pay Periods will be available for use/forecasting immediately and will be reflected in the balance viewable on the **Results by Calendar/Calendar Group** pages after the nightly Absence Calculation Process runs.

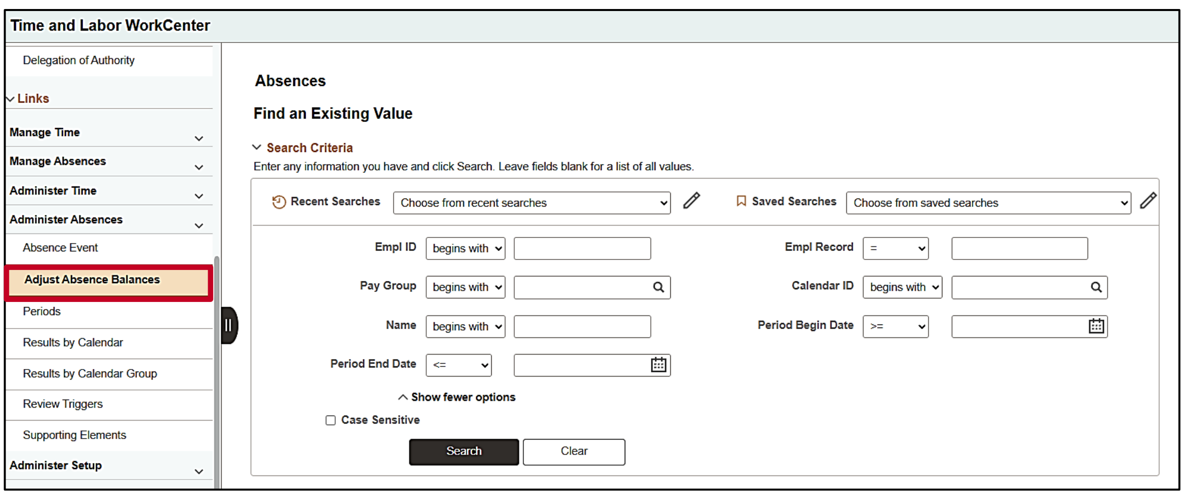
Manually Adjusting an Existing Absence Entitlement Balance

AM Administrators can edit balance adjustments that have been made in leave periods within one year from the current open calendar.

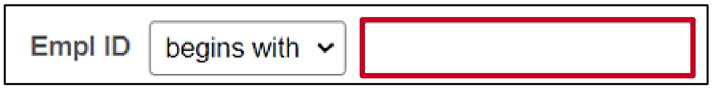
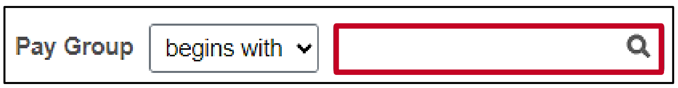
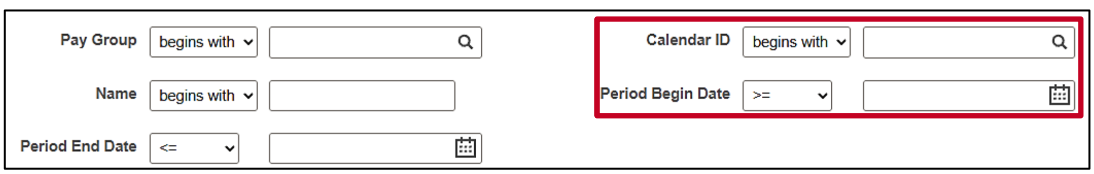
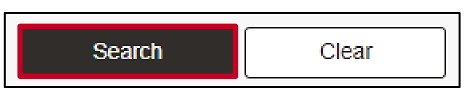
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Absences page by clicking the TA WorkCenter tile.

</td></tr>
<tr><td></td><td>For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>2.</td><td>Use the following navigation in the WorkCenter: Links > Administer Absences > Adjust Absence Balances

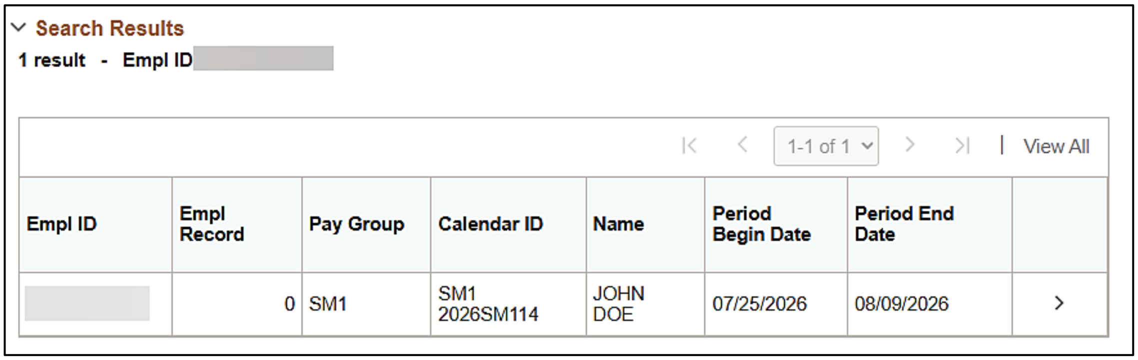
Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.



</td></tr>
<tr><td></td><td>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</td></tr>
</table>

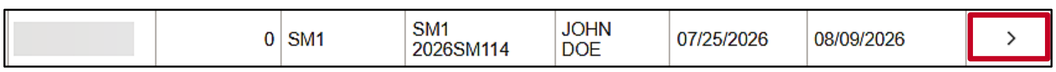
Step	Action
3.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for an employee by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 
4.	Click the **Pay Group Look up** icon to select the employee's Pay Group. **Note**: Ensure that the selected Pay Group is consistent with the employee's **Job Actions Summary** page for the same timeframe. 
5.	Select the applicable value for one of the following fields: • **Calendar ID**: Parameter for the Absence Calculation process that identifies the Pay Period in which the balance adjustment should be made effective. It can be a past, current, or future Pay Period. Click the **Calendar ID Look up** icon and select the applicable Pay Period. • **Period Begin Date**: The Pay Period begin date when the balance adjustment should be effective. Click the **Period Begin Date Calendar** icon and select the applicable Pay Period begin date. 
6.	Click the **Search** button. 

Step	Action
	The Search Results (Calendar IDs available for the employee based on the data entered) display in the **Search Results** section.


Search Results
1 result - Empl ID
1-1 of 1 View All

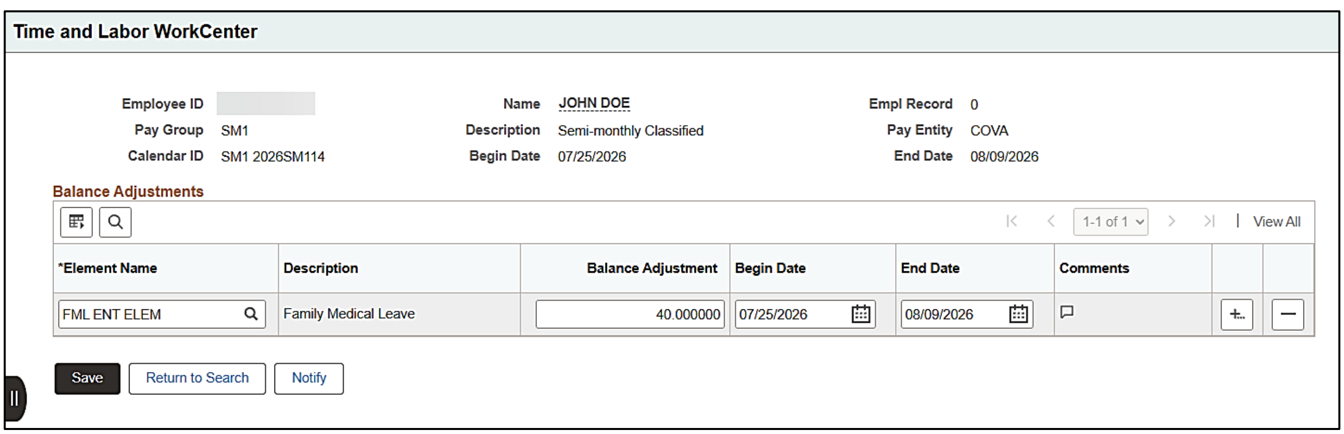
Empl ID	Empl Record	Pay Group	Calendar ID	Name	Period Begin Date	Period End Date	
	0	SM1	SM1 2026SM114	JOHN DOE	07/25/2026	08/09/2026	>

Step	Action
7.	Click the applicable **Drill in** (**>**) icon based on the effective date of the change. **Note**: Verify that the Pay Group is consistent with the employee's **Job Actions Summary** page. Select the Pay Period with the correct Pay Period begin date and end date wherein the balance should be available for the employee. Selecting the incorrect Calendar ID may result in the incorrect processing of the adjustment. Balance adjustments should not be entered in calendars that end in "00" or "F1" as these are not regular semi-monthly leave period calendars.



	0	SM1	SM1 2026SM114	JOHN DOE	07/25/2026	08/09/2026	>

The **Absences** page displays for the applicable Calendar ID.


Time and Labor WorkCenter

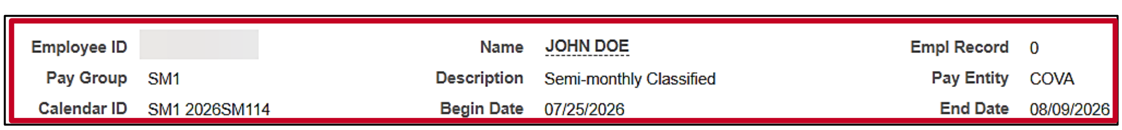
Employee ID		Name	JOHN DOE	Empl Record	0
Pay Group	SM1	Description	Semi-monthly Classified	Pay Entity	COVA
Calendar ID	SM1 2026SM114	Begin Date	07/25/2026	End Date	08/09/2026

Balance Adjustments
1-1 of 1 View All

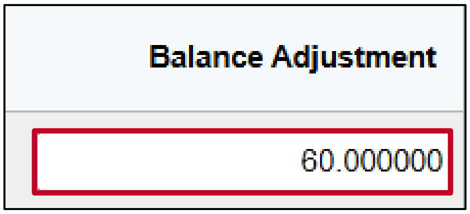
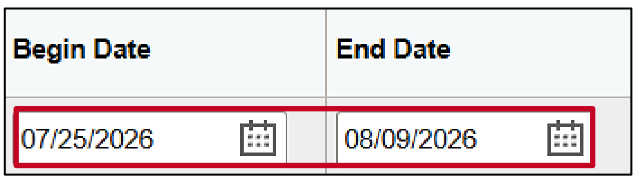
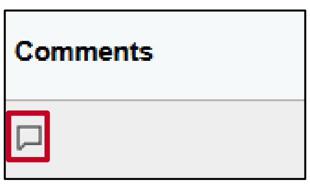
*Element Name	Description	Balance Adjustment	Begin Date	End Date	Comments
FML ENT ELEM	Family Medical Leave	40.000000	07/25/2026	08/09/2026	

Save Return to Search Notify

Step	Action
8.	Review the information in the **Header** section to confirm that the correct selection was made.

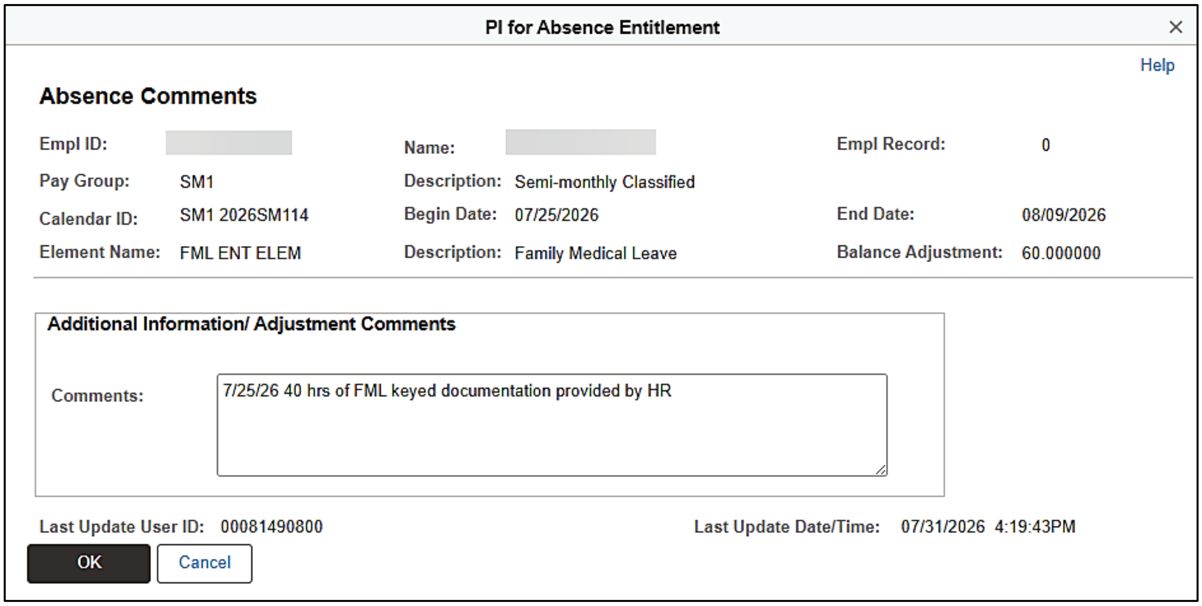


Employee ID		Name	JOHN DOE	Empl Record	0
Pay Group	SM1	Description	Semi-monthly Classified	Pay Entity	COVA
Calendar ID	SM1 2026SM114	Begin Date	07/25/2026	End Date	08/09/2026

Step	Action
9.	Enter the number of hours for the adjustment in the **Balance Adjustment** field. 
	In this scenario, the employee had previously been given 40 hours of FML, this adjustment needs to be increased by 20 hours. Simply overwrite the existing 40 with 60 to increase the employee's balance by 20 hours.
10.	The **Begin Date** and **End Date** fields default based on the Calendar ID previously selected. **Note**: Do not change these dates. If these dates do not reflect the Pay Period in which the absence balance adjustment is to be effective, click the **Return to Search** button and select the applicable Calendar ID. 
11.	Click the **Comments** icon in the **Comments** field. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">

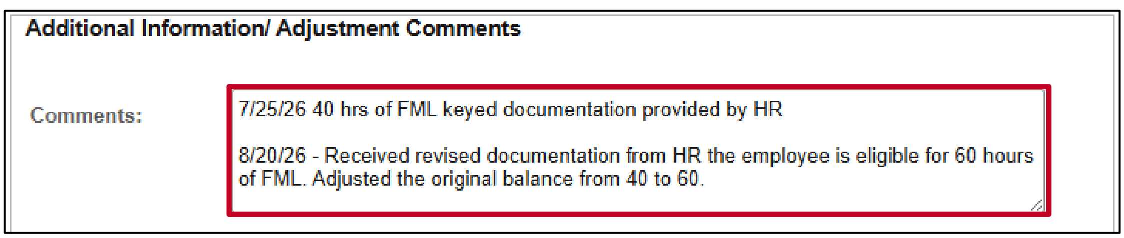
The **PI for Absence Entitlement** page displays in a pop-up window.



</td></tr>
<tr><td>12.</td><td>

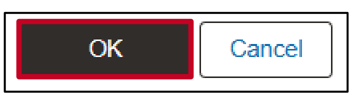
Enter a brief comment in the **Comments** field regarding why the adjustment is being made.

Note: Do not include any PII in the comments.



</td></tr>
<tr><td>13.</td><td>

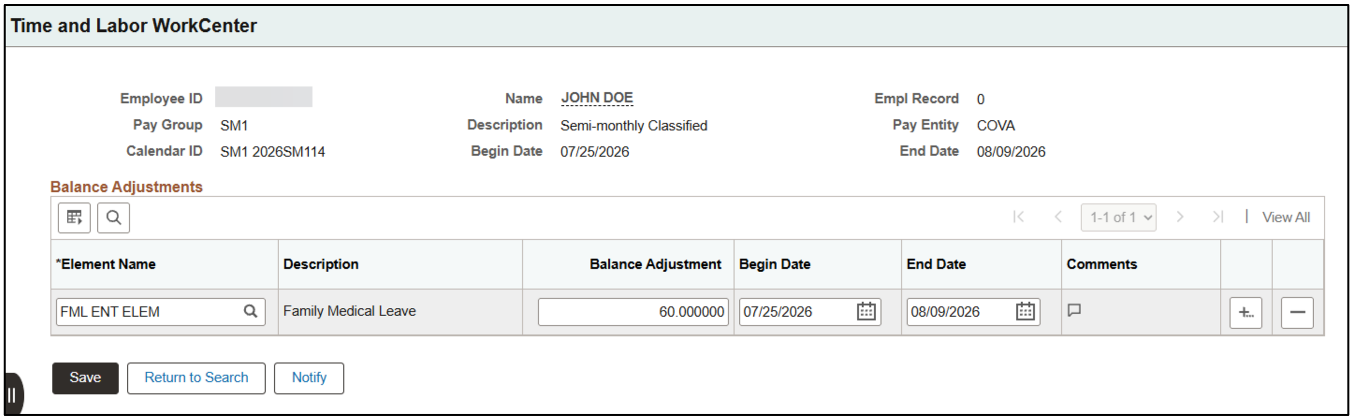
Click the **OK** button.



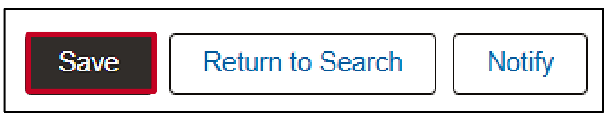
</td></tr>
</table>

Step	Action

The **Absences** page redisplays.



14. Click the **Save** button.



Adjustments made in the current open Pay Period and prior Pay Periods will be processed the next time the Absence Calculation process runs (runs nightly).

Managing Recognition Leave

Organizational Recognition Leave (ERL) and Service Recognition Leave (SRL) hours are granted though a balance adjustment in Cardinal. They become available for use on the first day of the Leave Period when the adjustment is entered and any unused hours automatically expire 12 months later.

Scenario:
Hours granted in the Calendar ID “SM1 2024SM115” are available for use from “8/10/2024” to “8/9/2025” and unused hours will expire during the “SM1 2025SM115” Calendar ID on “8/10/2025”.

Agency Discretion on Usage Timeframe:
Per Recognition Leave (Policy 1.15), Agencies may extend the usage (retention period) of the recognition leave beyond one year in certain scenarios. However, Cardinal is configured for statewide standard usage, automatically expiring ERL/SRL hours 12 months after the Leave Period of the original balance adjustment.

Adjusting ERL and SRL Hours and Usage Timeframes:

Important Guidance on Balance Adjustments:

- Do not enter negative balance adjustments for the ERL or SRL Leave Types for active employees in Cardinal as this will disrupt automatic expiration calculations
- If unused hours do not expire as expected, submit a help desk ticket by emailing vccc@vita.virginia.gov with “Cardinal TA” in the Subject line

Extending Usage Time:
To grant an employee more time to use their ERL/SRL hours, an Agency can extend the expiration date by up to 12 months from the original date. The Agency first determines the new expiration date, then creates a new balance adjustment for the remaining hours in the calendar that begins exactly one year before the new expiration date.

Scenario:

- An employee was granted 24 ERL hours in the “SM1 2024SM108” calendar. These hours were usable from “4/25/2024” to “4/24/2025”
- The employee used 16 hours, and the remaining 8 hours expired on “4/25/2025”
- The Agency wants to give the employee an additional three months to use the remaining 8 hours, extending usage to “7/24/2025”

How to Extend:

- To extend the leave usage to “7/24/2025”, the Agency must create a new balance adjustment for 8 hours in the “SM1 2024SM114” calendar as it began “7/25/2024”
- Entering the balance adjustment in the “SM1 2024SM114” calendar will set a new expiration date of “7/25/2025”, giving the employee until “7/24/2025” to use the remaining 8 hours

Shortening Usage Time:

Agencies with a policy requiring employees to use ERL/SRL hours within a shorter timeframe than DHRM policy must manually manage ERL/SRL leave balances. This means the Agency is responsible for monitoring usage and adjusting the leave balance by removing any unused hours from the original balance adjustment.

Scenario:

An employee was granted 8 ERL hours with an Agency policy requiring the hours to be used within the month of July 2025. The balance adjustment was entered in the “SM1 2025SM112” calendar which began “6/25/2025” making the hours available for use within the month of July.

Discrepancy:

While the Agency’s policy dictates that the hours must be used by “7/31/2025”, the Cardinal system automatically sets the expiration date to “6/25/2026” (12 months from when they were granted).

How to Manage:

To enforce the Agency’s policy and prevent any unused hours being available beyond the intended date, the following steps must be taken:

- The Agency must monitor the usage of the employee’s 8 ERL hours ensuring that all 8 hours are used by “7/31/2025”
- If any hours remain unused by this date, the Agency must update the original balance adjustment to reflect only the hours that were used. For example, if only 4 hours were used, the original adjustment should be updated from 8 hours to 4 hours
- If the original adjustment is not updated, the unused hours will remain in the employee’s balance until the system’s automatic expiration date

Important Note: A negative balance adjustment should never be used to remove unused hours.

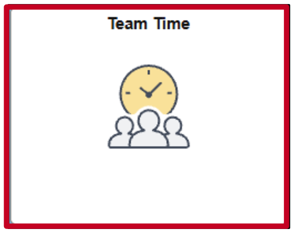
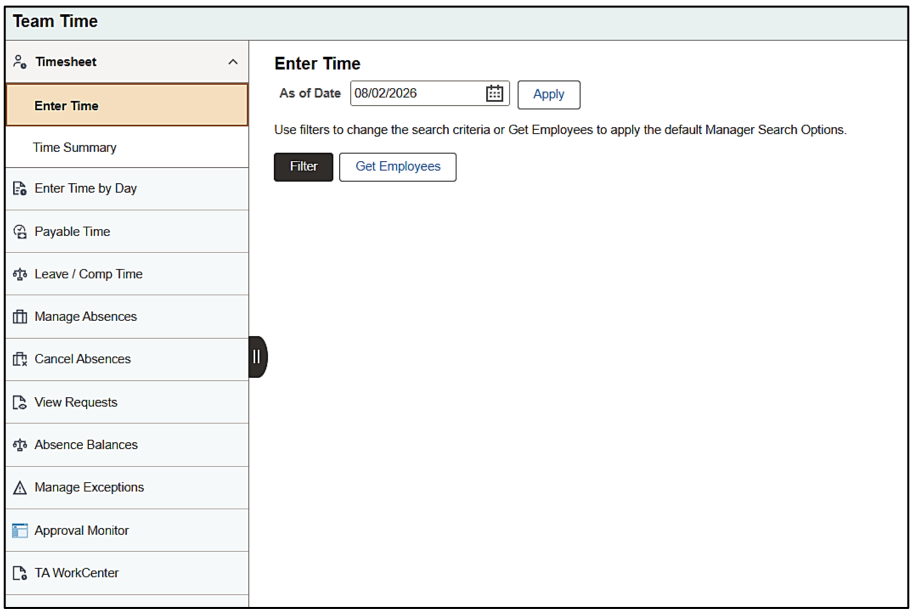
Adjusting Compensatory and Overtime Leave Balances

There are several Time Reporting Codes (TRCs) related to Compensatory and Overtime Leave adjustments, deductions and payouts.

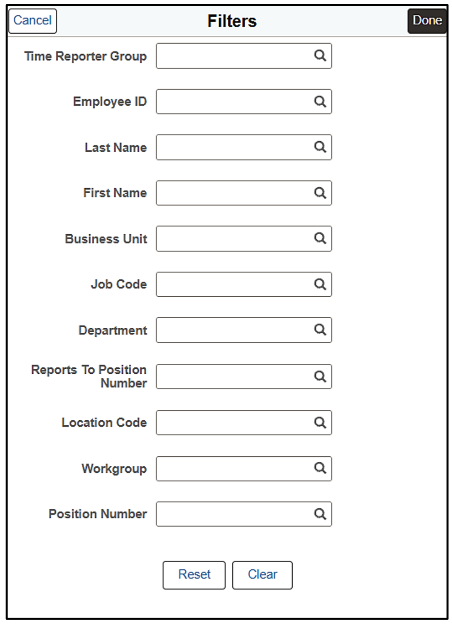
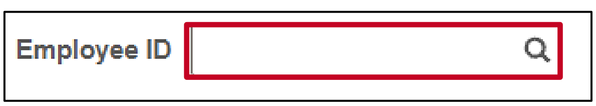
Only TL and AM Administrators have access to the following TRCs:

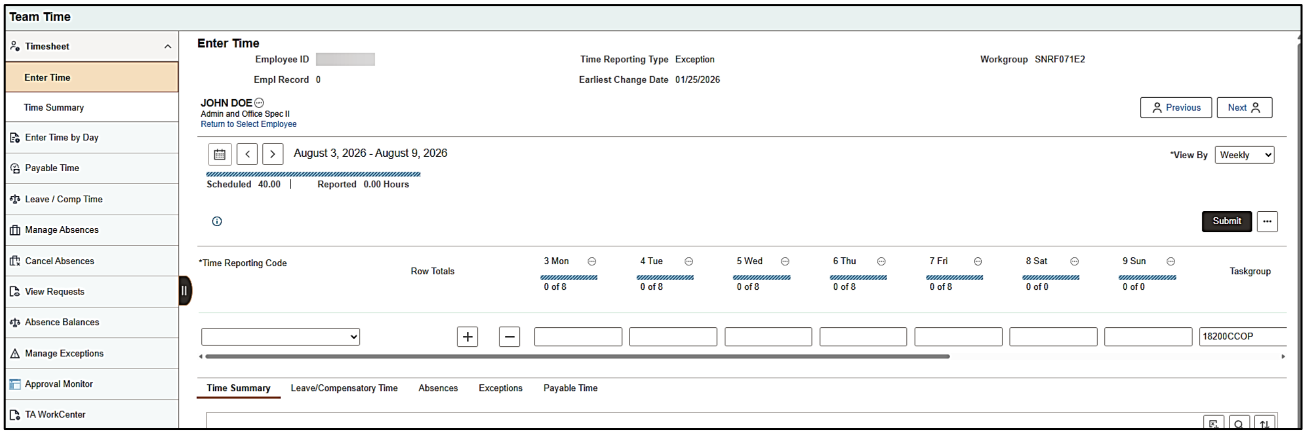
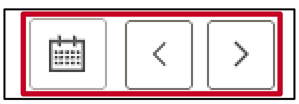
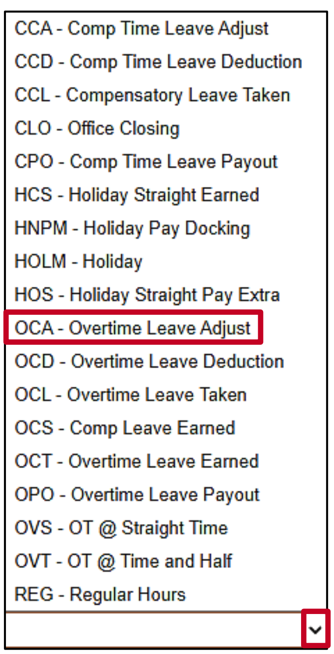
- CCA - Comp Time Leave Adjust: Use CCA to correct an employee's balance by entering the appropriate hours to increase the employee's balance
- CCD - Comp Time Leave Deduction: Use CCD to correct an employee's balance by entering the appropriate hours to decrease the employee's balance.
- CPO - Comp Time Leave Payout: Use CPO to pay out the employee's Comp Time Leave balance. Work with the PY Administrator to ensure the employee is paid through SPOT.
- OCA - Overtime Leave Adjust: Use OCA to correct an employee's balance by entering the appropriate hours to increase the employee's balance
- OCD - Overtime Leave Deduction: Use OCD to correct an employee's balance by entering the appropriate hours to decrease the employee's balance.
- OPO - Overtime Leave Payout: Use OPO to pay out the employee's Overtime Leave. Work with the PY Administrator to ensure the employee is paid through SPOT.

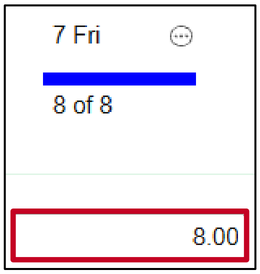
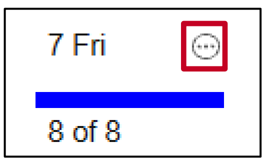
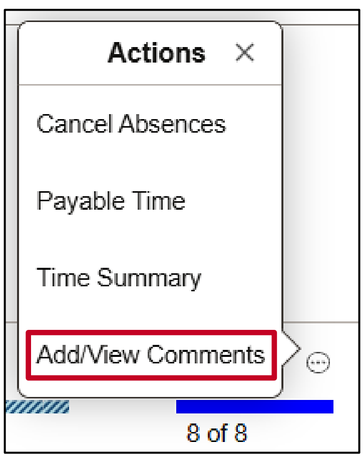
Follow the steps below for more details on this process:

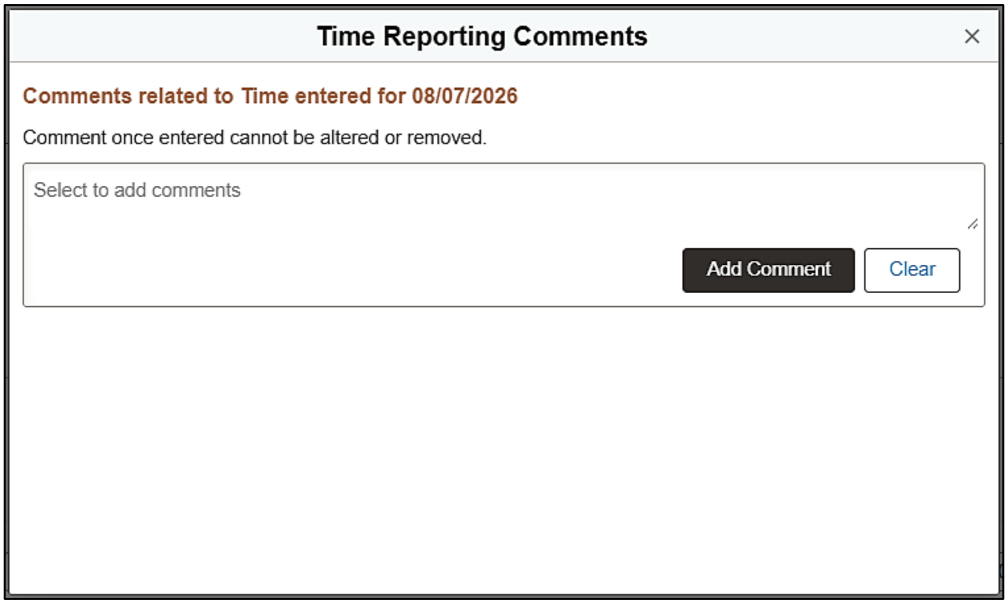
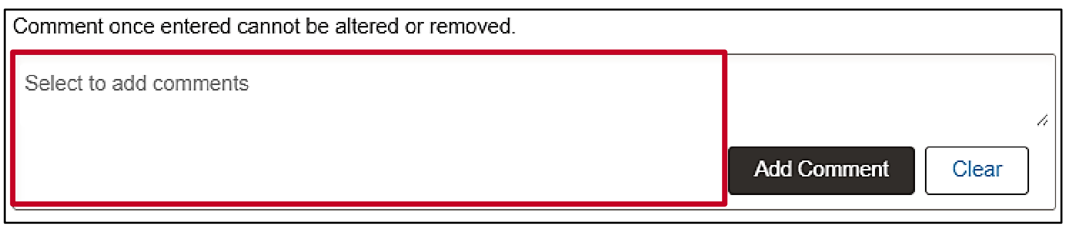
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click the Team Time tile.

</td></tr>
<tr><td colspan="2">The Enter Time page displays.

</td></tr>
<tr><td>2.</td><td>Click the Get Employees button or the Filter button to pull up the employee.
In this scenario, click the Filter button.

</td></tr>
</table>

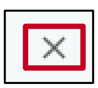
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Filters page displays in a pop-up window.
</td></tr>
<tr><td>3.</td><td>Enter the applicable employee’s Employee ID in the Employee ID field.
Note: Users can also search by name or by using one of the other corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.
</td></tr>
<tr><td>4.</td><td>Click the Done button in the top right corner of the page.
</td></tr>
</table>

Step	Action
	The **Enter Time** page displays for the applicable employee. 
5.	Use the **Calendar** icon or **Previous** or **Next** buttons as needed to select the Timesheet for the week that the Leave balance needs to be adjusted. 
6.	Click the **Time Reporting Code** dropdown button and select "CCA" Comp Time Leave Adjust, "CCD" Comp Time Leave Deduction, "OCA" Overtime Leave Adjust, or "OCD" Overtime Leave Deduction as applicable. In this scenario, "OCA" Overtime Leave Adjust is selected. 

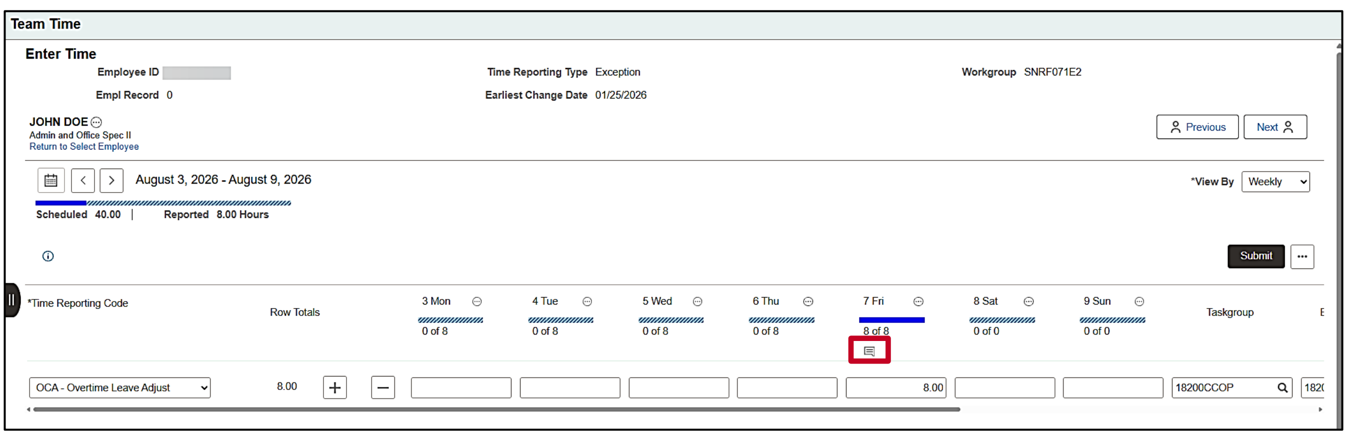
Step	Action
	Use the Adjust TRCs to add hours and the Deduction TRCs to reduce hours.
7.	Enter the number of Overtime Leave adjustment hours in the applicable **Day** field. 
	Hours entered on the Timesheet are always entered as a positive number.
8.	Click the **Related Actions** icon next to the day. 
9.	The **Actions** menu displays in a pop-up window. Click **Add/View Comments**. 

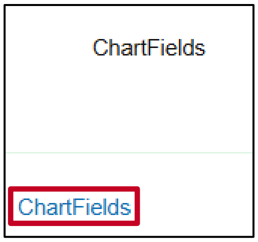
Step	Action
	The **Time Reporting Comments** page displays in a pop-up window. 
10.	Enter a brief comment to document the reason for the adjustment in the **Comment** field. **Note**: Do not include any PII in the comments. Once entered, comments cannot be altered or removed. 
11.	Click the **Add Comment** button. 

Step	Action
The **Time Reporting Comments** page redisplays.	

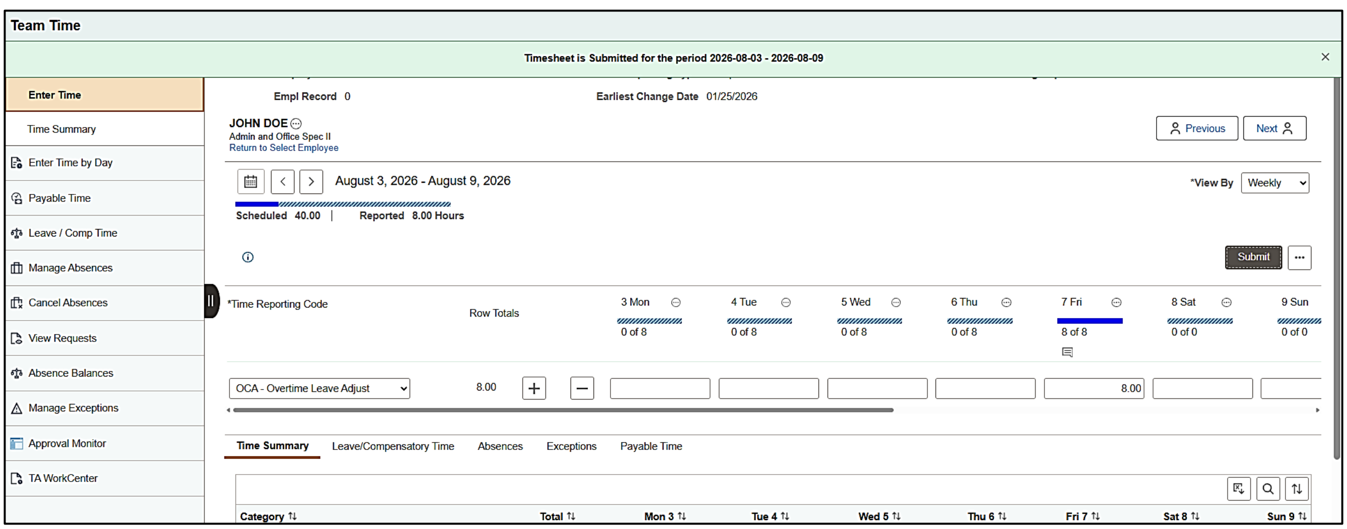
Step	Action
12.	Click the **X** in the top right corner of the **Time Reporting Comments** page. 

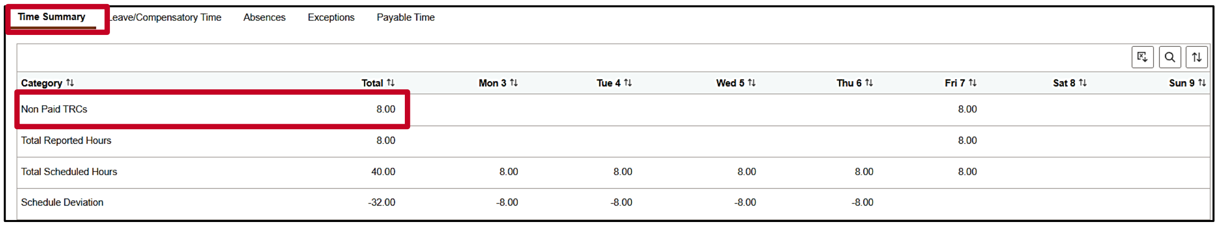
The **Enter Time** page redisplays with the comment added under the applicable **Day** field.



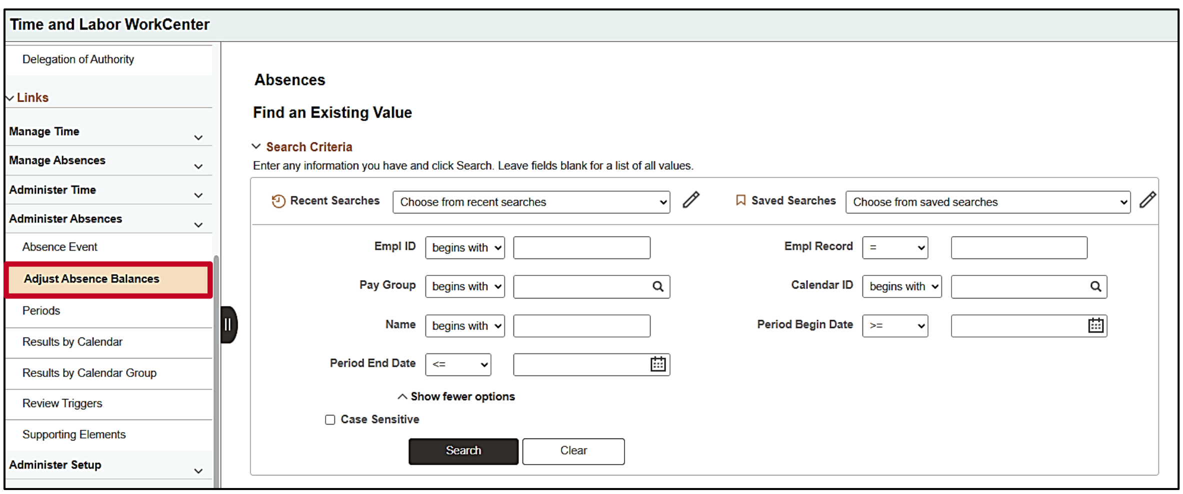
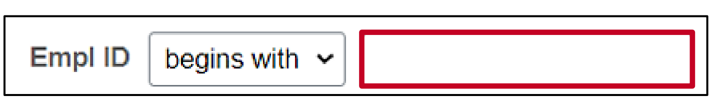
Step	Action
13.	If ChartFields are optional or required for the employee, a **ChartFields** link will display on the Timesheet. If the **ChartFields** link displays on the Timesheet and is required, click the **ChartFields** link and enter the ChartField Details. 
	For more information pertaining to entering ChartField Details, refer to the Job Aid titled **TA371 Entering ChartField Details on the Timesheet**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
14.	Click the **Submit** button. 

A message displays at the top of the **Enter Time** page indicating the time has been submitted.



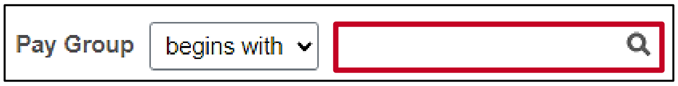
Step	Action
15.	Scroll down to the **Time Summary** tab and review the time to ensure it has been submitted correctly. 
	Repeat these steps for each Leave Type that needs to be adjusted on the Timesheet.

Managing Leave Donation

Step	Action
1.	Navigate to the **Absences** page by clicking the **TA WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation in the WorkCenter: **Links > Administer Absences > Adjust Absence Balances** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
3.	Enter the applicable employee's (employee donating leave) Employee ID in the **Empl ID** field. **Note**: Users can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 

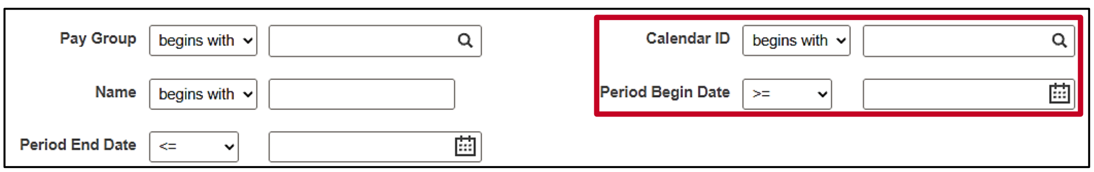
Step	Action
4.	Click the **Pay Group Look up** icon to select the employee's Pay Group.

Note: Ensure that the selected Pay Group is consistent with the employee's **Job Actions Summary** page for the same timeframe.

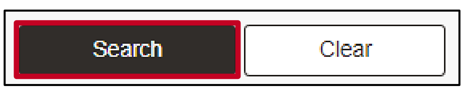


Step	Action
5.	Select the applicable value for one of the following fields:

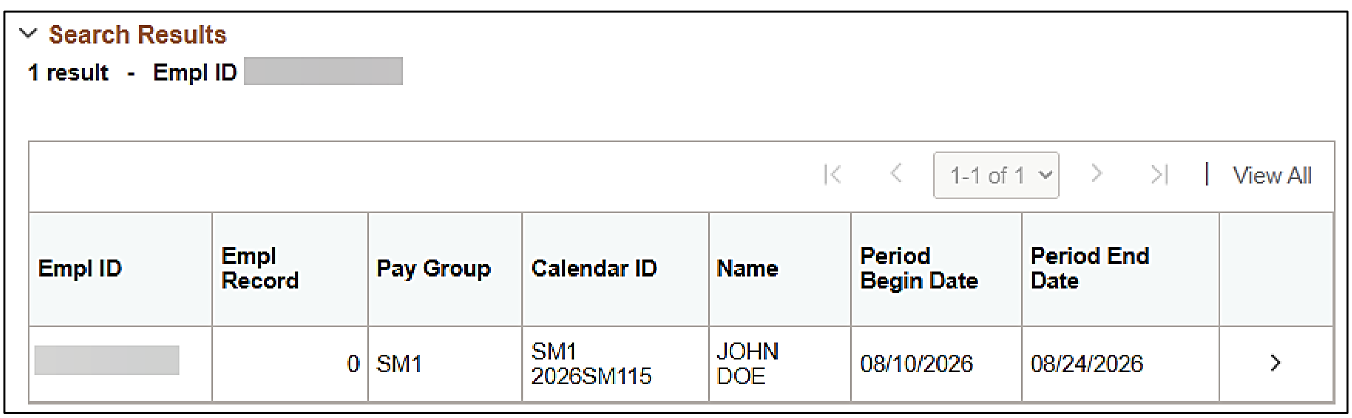
- **Calendar ID**: Parameter for the Absence Calculation process that identifies the Pay Period in which the balance adjustment should be made effective. It can be a past, current, or future Pay Period. Click the **Calendar ID Look up** icon and select the applicable Pay Period.
- **Period Begin Date**: The Pay Period begin date when the balance adjustment should be effective. Click the **Period Begin Date Calendar** icon and select the applicable Pay Period begin date.



Step	Action
6.	Click the **Search** button.



The search results (Calendar IDs available for the employee) display in the **Search Results** section.



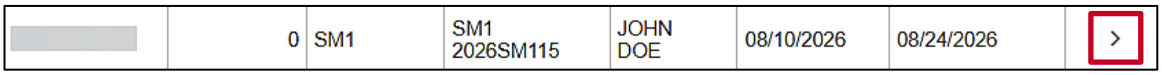
Empl ID	Empl Record	Pay Group	Calendar ID	Name	Period Begin Date	Period End Date	
	0	SM1	SM1 2026SM115	JOHN DOE	08/10/2026	08/24/2026	>

Step **Action**

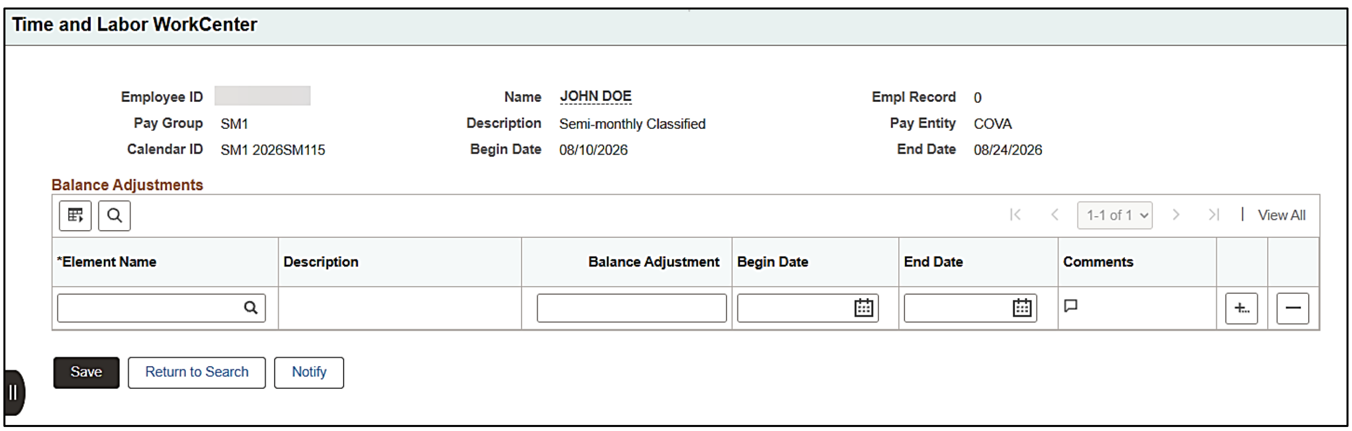
7. Click the applicable **Drill in** (**>**) icon based on the effective date of the change.

Note: Verify that the Pay Group is consistent with the employee's **Job Actions Summary** page. Select the Pay Period with the correct Pay Period begin date and end date wherein the balance should be available for the employee. Selecting the incorrect Calendar ID may result in the incorrect processing of the adjustment.

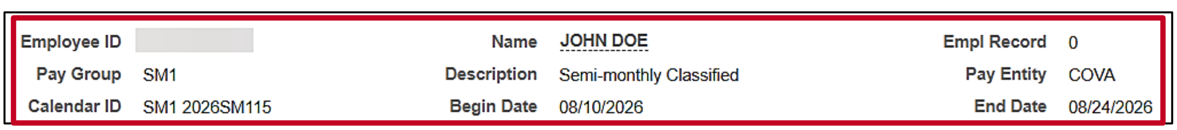
Balance adjustments should not be entered in calendars that end in "00" or "F1" as these are not regular semi-monthly leave period calendars.



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

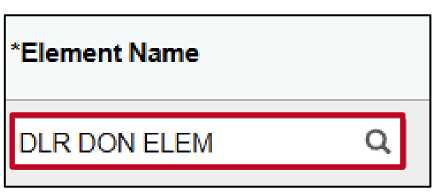


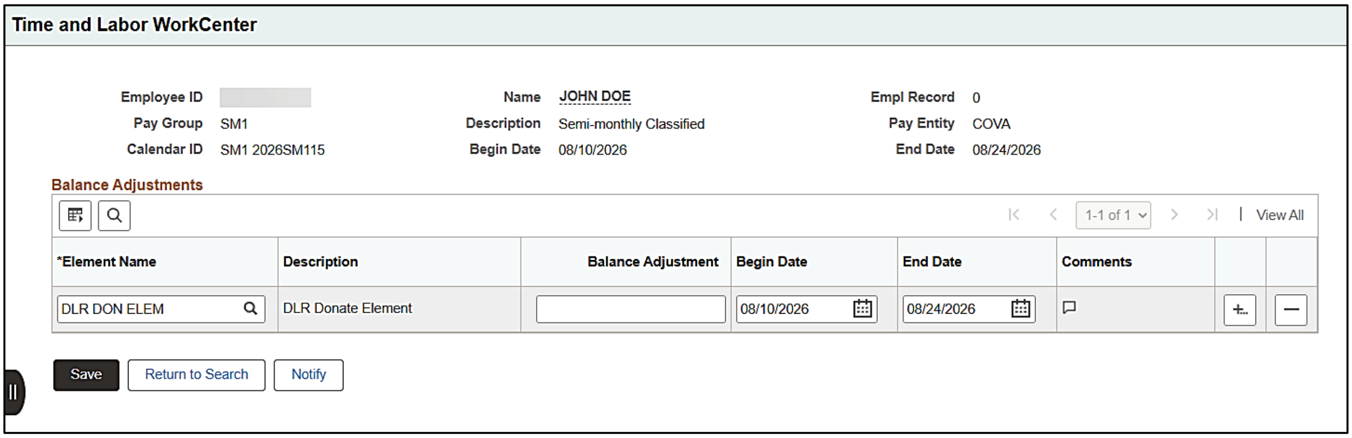
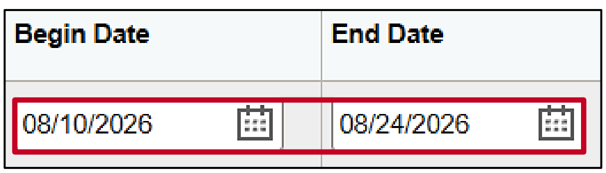
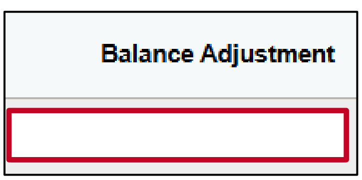
8. The **Header** section populates based on the employee selected to donate leave. Review the information to confirm that the correct employee selection was made.



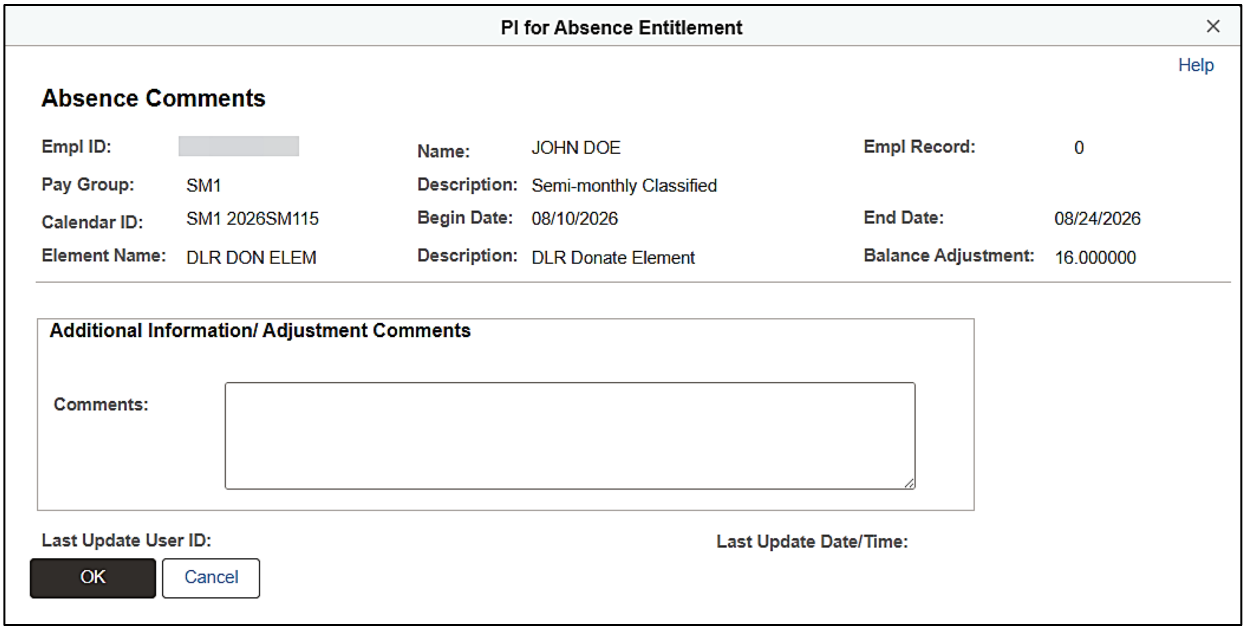
9. Click the **Element Name Look up** icon in the **Element Name** field and select "DLR DON ELEM".

Note: "DLR DON ELEM" hours are deducted from the employee's VAC balance. If the donated hours are to be deducted from a balance other than VAC, see the Manually Adjusting an Existing Absence Entitlement Balance section of this Job Aid.



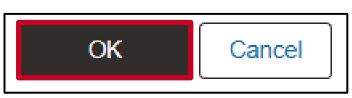
Step	Action
	The **Absences** page refreshes and the **Description** field populates based on the element name selected. 
10.	The **Begin Date** and **End Date** fields default based on the Calendar ID or Pay Period previously selected. **Note**: Do not change these dates. If this is not the correct Pay Period, click the **Return to Search** button and select the correct Pay Period in which the donation will take effect. 
11.	Enter the number of hours being donated as a positive number in the **Balance Adjustment** field. 
12.	Click the **Comments** icon in the **Comments** field. 

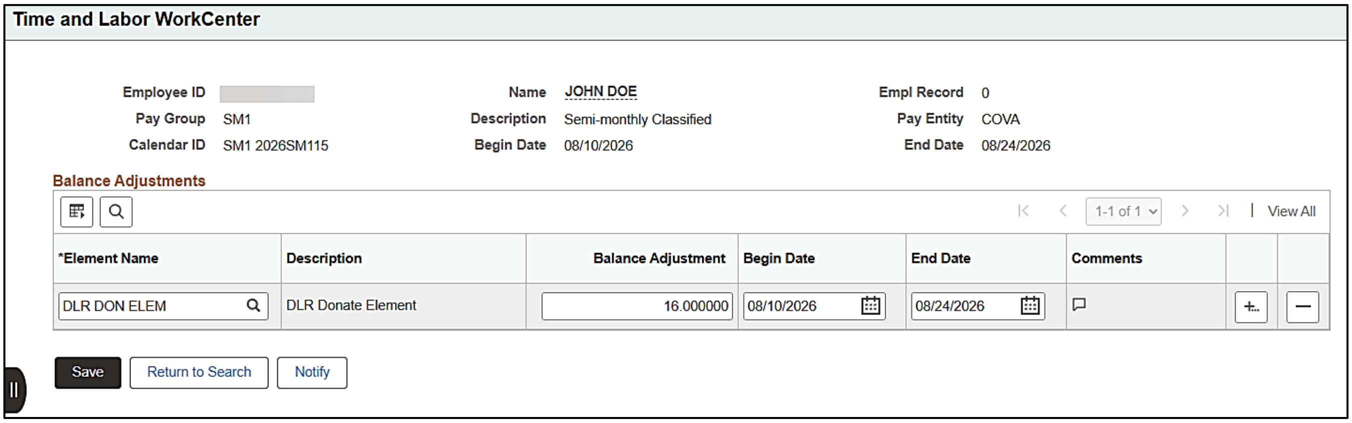
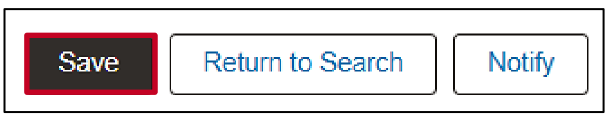
Step	Action
	The **PI for Absence Entitlement** page displays in a pop-up window.

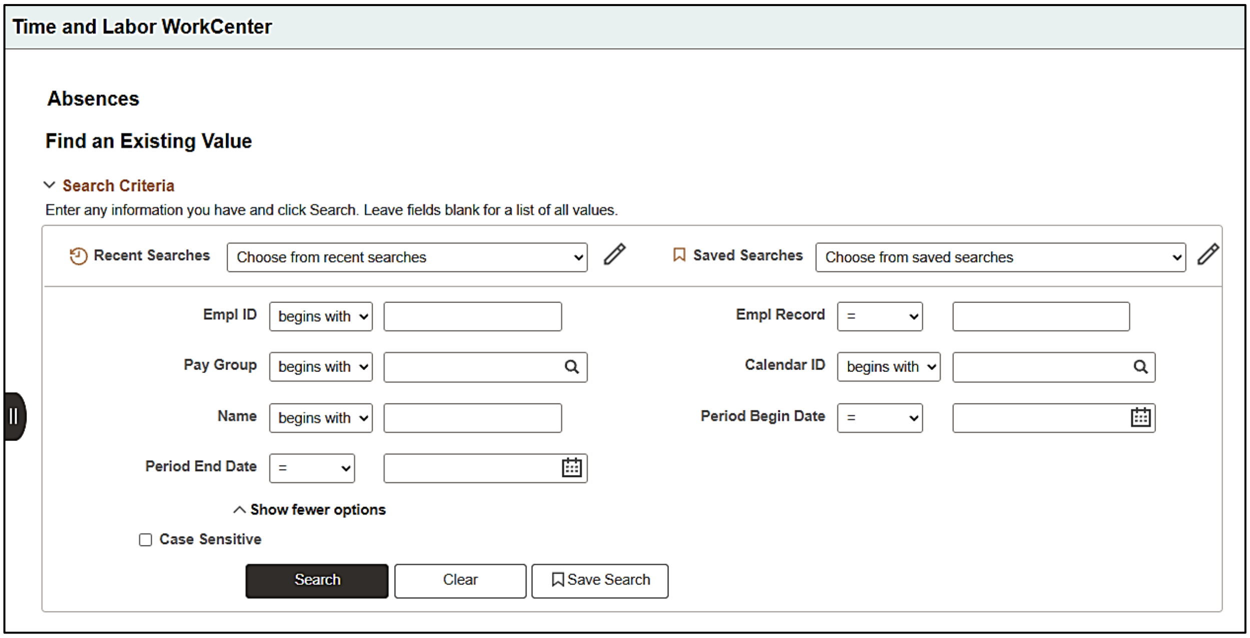
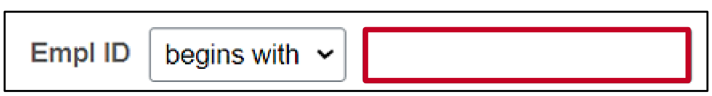
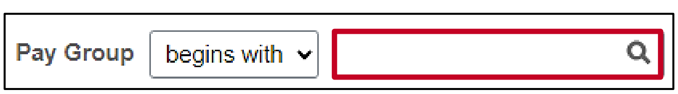
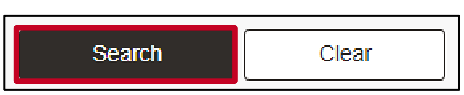


Step	Action
13.	Enter a brief comment in the **Comments** field to document that this is a leave donation. **Note**: Do not include any PII in the comments.

Step	Action
14.	Click the **OK** button.

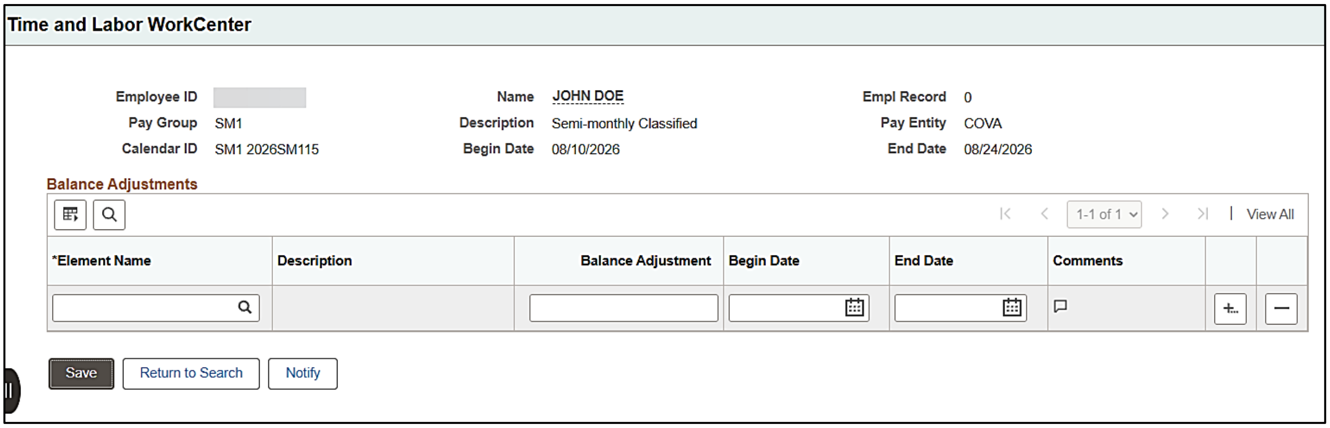


Step	Action
	The **Absences** page redisplays. 
15.	Click the **Save** button. 
	The user has completed the adjustment for the donor. Now the adjustment must be made for the recipient.
16.	Click the **Return to Search** button. 

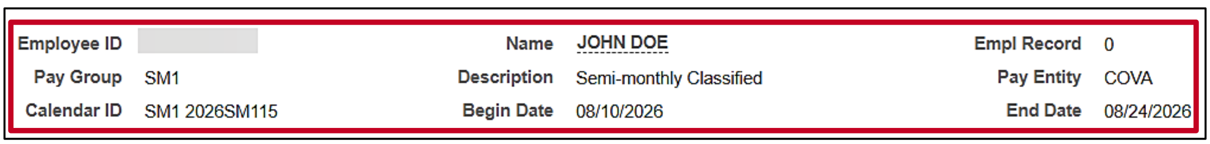
Step	Action
	The **Absences Find an Existing Value Search** page redisplays. 
	If using the **Clear** button, capture the Calendar ID first as the Calendar ID for the leave recipient should match the Calendar ID for the employee who donated leave.
17.	Enter the applicable employee's (employee receiving the donated hours) Employee ID in the **Empl ID** field. 
18.	Click the **Pay Group Look up** icon to select the employee's Pay Group. **Note**: Ensure that the selected Pay Group is consistent with the employee's **Job Actions Summary** page for the same timeframe. 
19.	Click the **Search** button. 

Step	Action

The **Absences** page for the employee who will receive the donated leave displays.

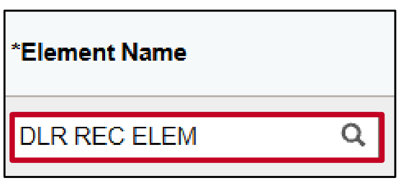


20. The **Header** section populates based on the employee selected to receive the donated leave. Review the information to confirm that the correct employee selection was made.

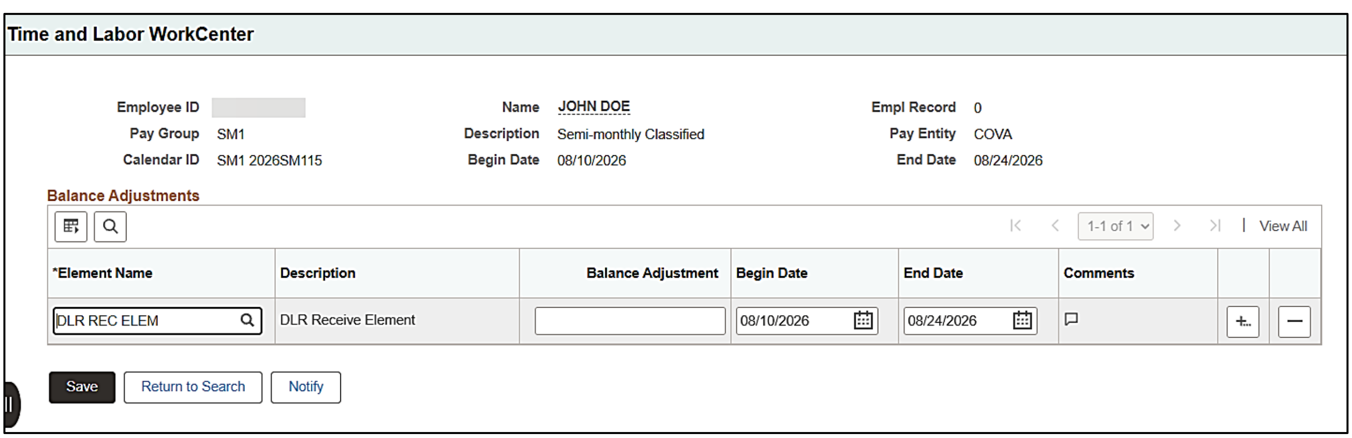


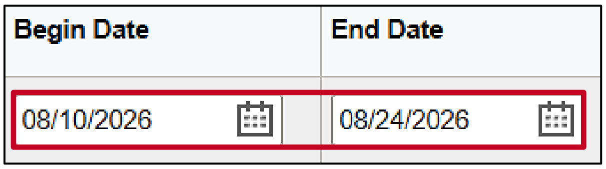
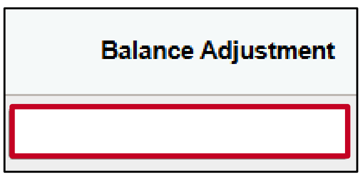
21. Click the **Element Name Look up** icon and select “DLR REC ELEM”.

Note: This will increase the recipients’ DLR balance.

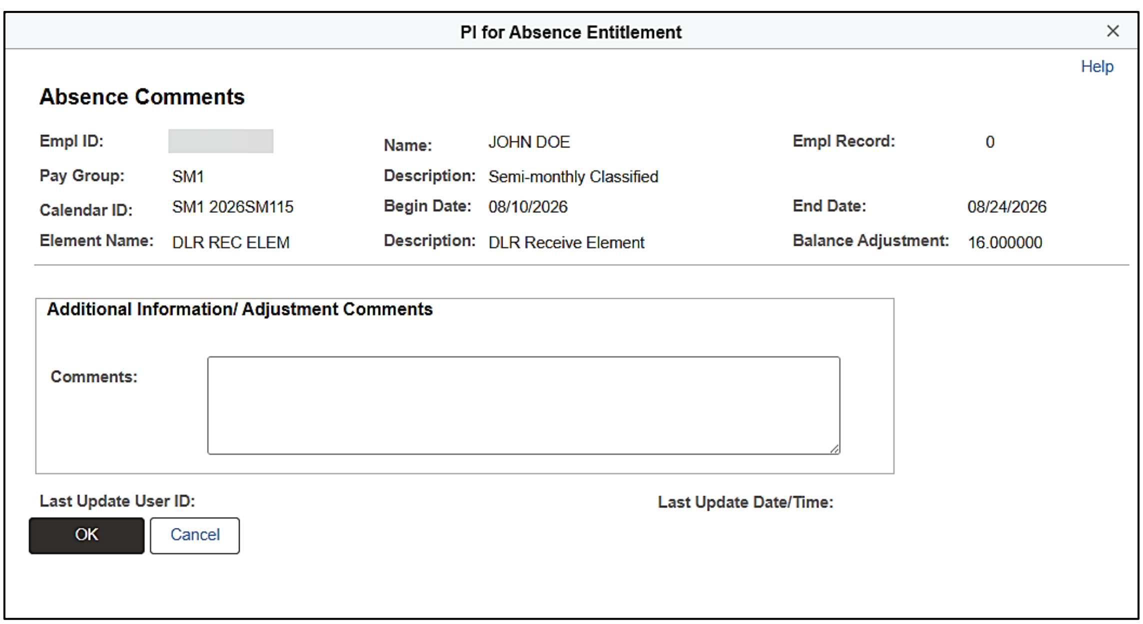


The **Absences** page refreshes and the **Description** field populates based on the Element Name selected.



Step	Action
22.	The **Begin Date** and **End Date** fields default based on the Calendar ID or Pay Period previously selected. **Note**: Do not change these dates. If this is not the correct Pay Period, click the **Return to Search** button and select the correct Pay Period in which the donation will take effect. 
23.	Enter the hours being received as a positive number in the **Balance Adjustment** field. 
24.	Click the **Comments** icon in the **Comments** field. 

The **PI for Absence Entitlement** page displays in a pop-up window.



PI for Absence Entitlement

Help

Absence Comments

Empl ID:		Name:	JOHN DOE	Empl Record:	0
Pay Group:	SM1	Description:	Semi-monthly Classified		
Calendar ID:	SM1 2026SM115	Begin Date:	08/10/2026	End Date:	08/24/2026
Element Name:	DLR REC ELEM	Description:	DLR Receive Element	Balance Adjustment:	16.000000

Additional Information/ Adjustment Comments

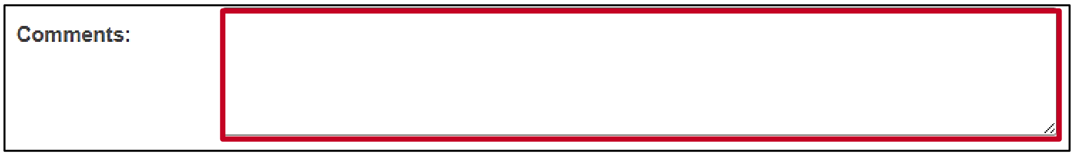
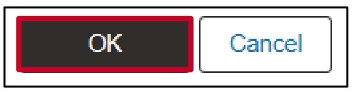
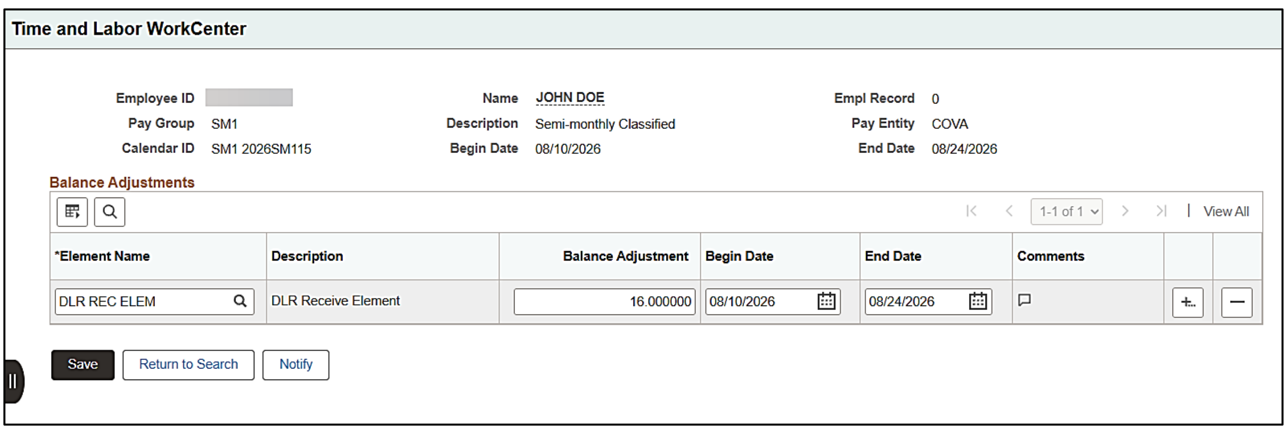
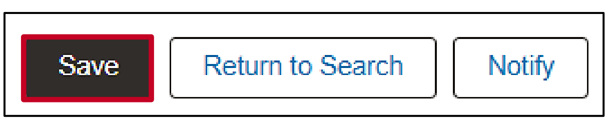
Comments:

Last Update User ID:

Last Update Date/Time:

OK

Cancel

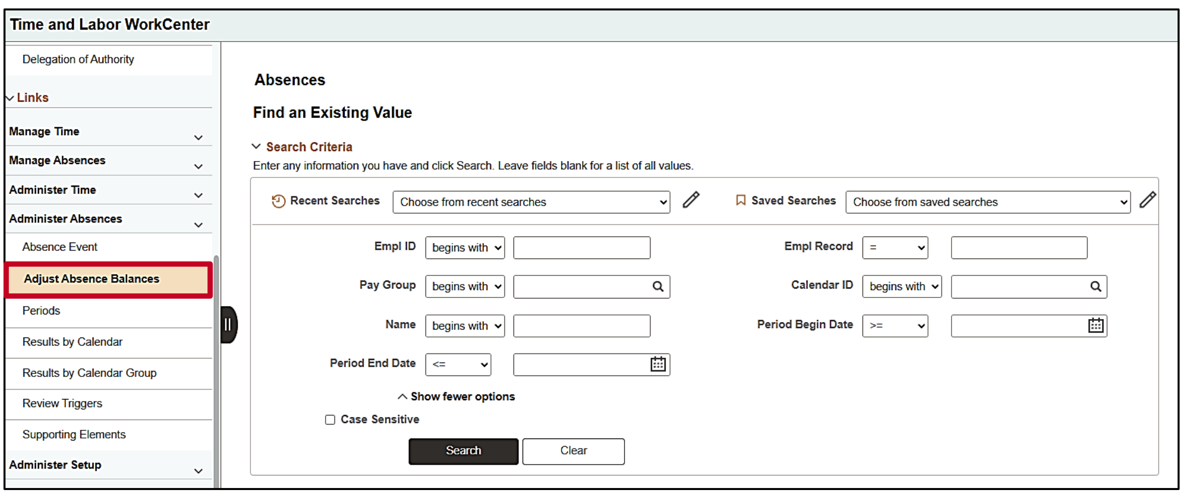
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>25.</td><td>Enter a brief comment in the Comments field to document that this is a leave donation.
Note: Do not include any PII in the comments.
</td></tr>
<tr><td>26.</td><td>Click the OK button.
</td></tr>
<tr><td colspan="2">The Absences page redisplays.
</td></tr>
<tr><td>27.</td><td>Click the Save button.
</td></tr>
<tr><td></td><td>The leave donation process is now complete. Adjustments made in the current open Pay Period and prior Pay Periods will be processed the next time the Absence Calculation Process runs (runs nightly).</td></tr>
</table>

Returning Unused Leave Donation Hours

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Navigate to the Absences page by clicking the TA WorkCenter tile.

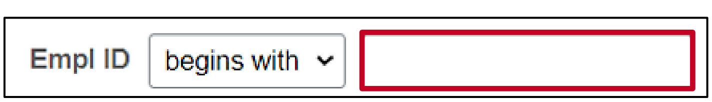
</td></tr>
<tr><td></td><td>For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>2.</td><td>Use the following navigation in the WorkCenter: Links > Administer Absences > Adjust Absence Balances

Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.

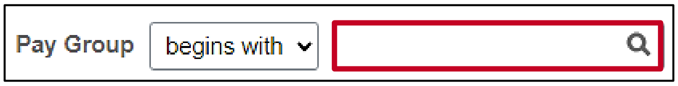
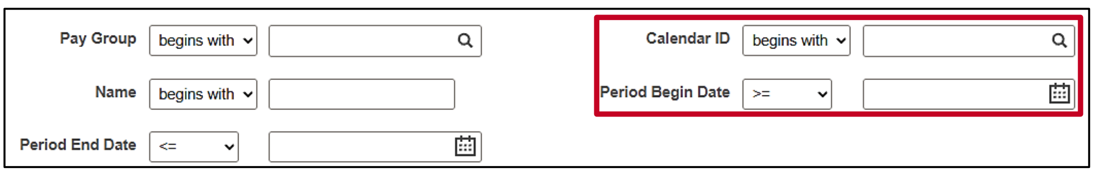
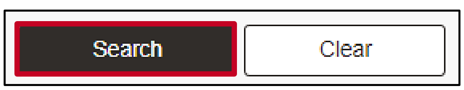


</td></tr>
<tr><td></td><td>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</td></tr>
<tr><td>3.</td><td>Enter the applicable employee’s (employee donating leave) Employee ID in the Empl ID field.

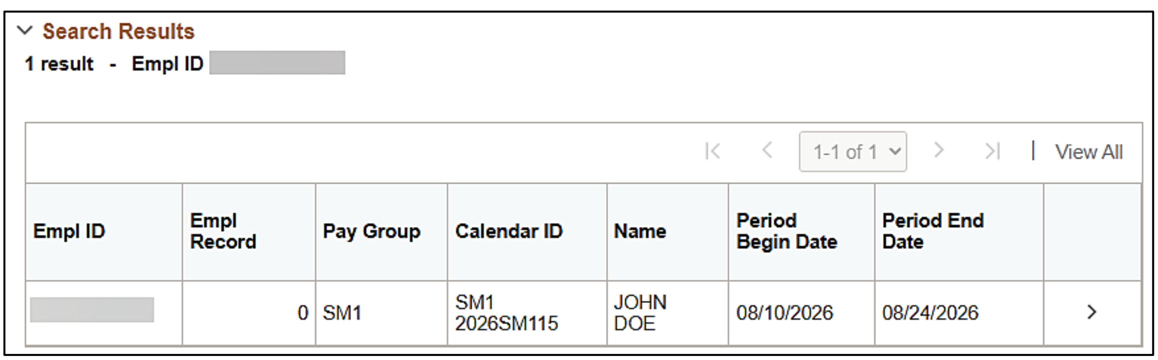
Note: Users can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.



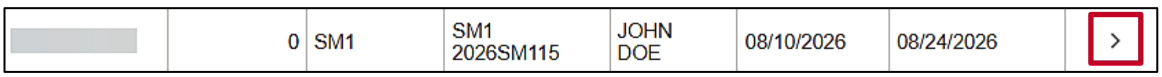
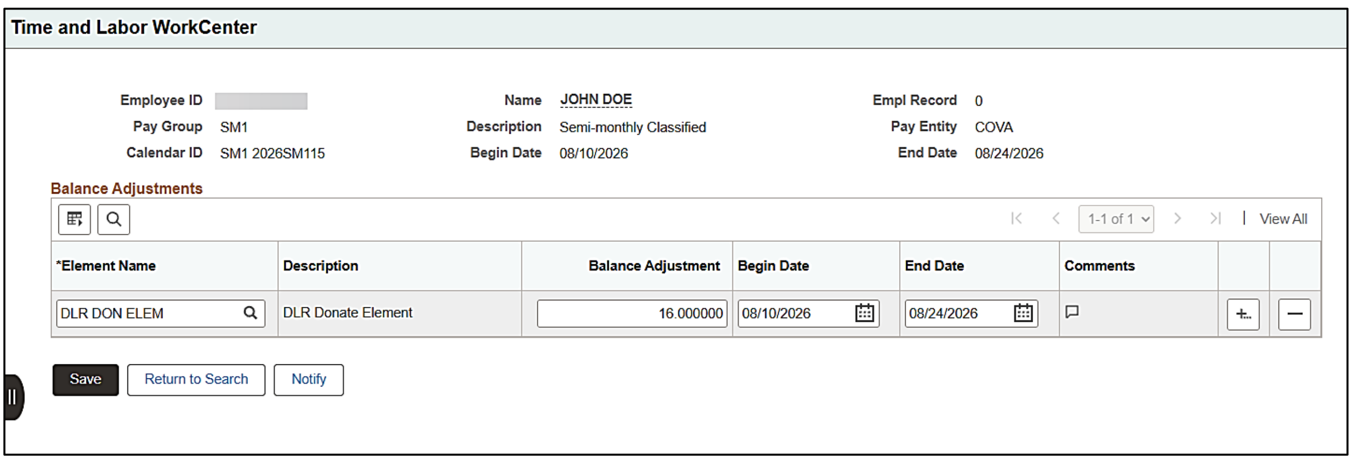
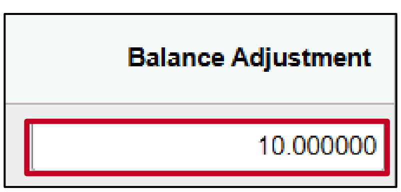
</td></tr>
</table>

Step	Action
4.	Click the **Pay Group Look up** icon to select the employee's Pay Group. **Note**: Ensure that the selected Pay Group is consistent with the employee's **Job Actions Summary** page for the same timeframe. 
5.	Select the applicable value for one of the following fields: • **Calendar ID**: Parameter for the Absence Calculation process that identifies the Pay Period in which the balance adjustment should be made effective. It can be a past, current, or future Pay Period. Click the **Calendar ID Look up** icon and select the applicable Pay Period. • **Period Begin Date**: The Pay Period begin date when the balance adjustment should be effective. Click the **Period Begin Date Calendar** icon and select the applicable Pay Period begin date. 
6.	Click the **Search** button. 

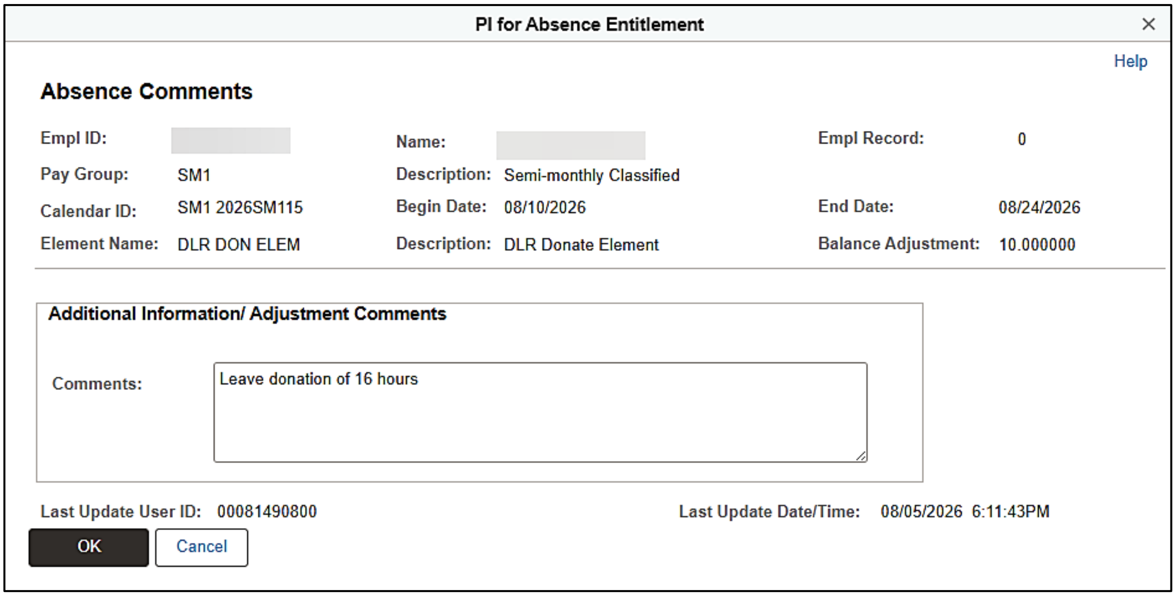
The search results (Calendar IDs available for the employee) display in the **Search Results** section.



Empl ID	Empl Record	Pay Group	Calendar ID	Name	Period Begin Date	Period End Date	
	0	SM1	SM1 2026SM115	JOHN DOE	08/10/2026	08/24/2026	>

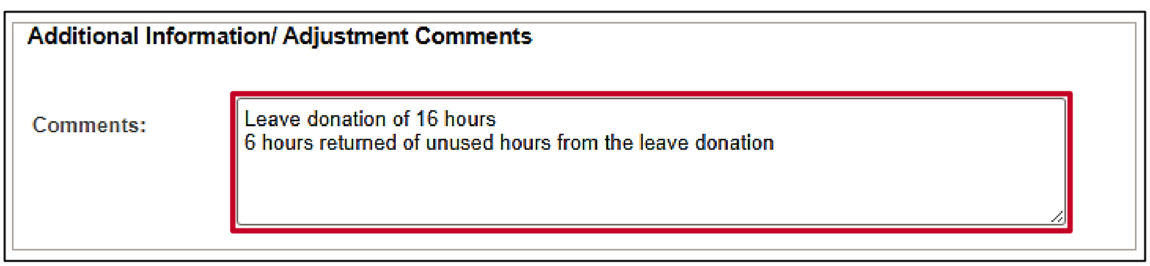
Step	Action
7.	Click the applicable **Drill in** (**>**) icon based on the effective date in which the return of unused hours will take effect. **Note**: Verify that the Pay Group is consistent with the employee's **Job Actions Summary** page. Select the Pay Period with the correct Pay Period begin date and end date wherein the balance should be available for the employee. Selecting the incorrect Calendar ID may result in the incorrect processing of the adjustment. Balance adjustments should not be entered in calendars that end in "00" or "F1" as these are not regular semi-monthly leave period calendars. 
The **Absences** page displays for the applicable employee with the original donation information. 	
8.	Update the **Balance Adjustment** field by overwriting the original number of donated hours with the number of hours used. For example, in this scenario 16 hours were initially donated, but only 10 hours were used, 6 hours are being returned to the donor. In this scenario enter 10 hours. 
9.	Click the **Comments** icon in the **Comments** field. 

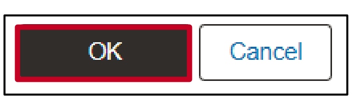
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The PI for Absence Entitlement page displays in a pop-up window.

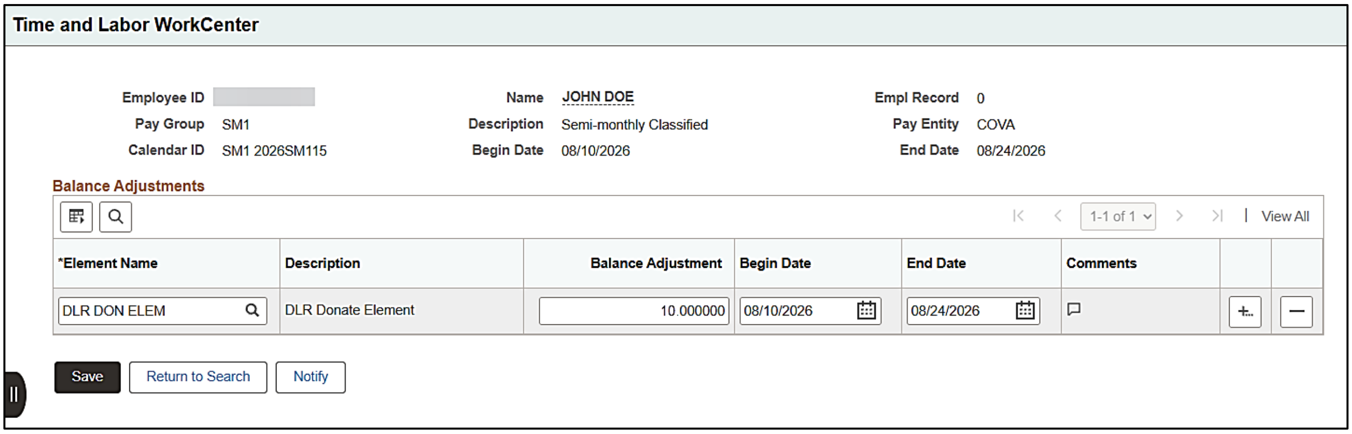
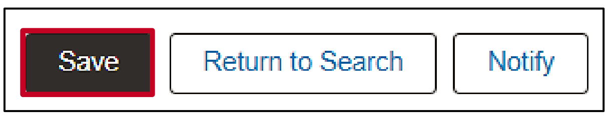

</td></tr>
<tr><td>10.</td><td>Enter a brief updated comment in the Comments field to document that this is a return of unused hours from a leave donation.

Note: When the Comments field is opened, the user will also see the comment from when the balance adjustment was originally keyed, this shouldn’t be deleted. Add another comment after the original one.

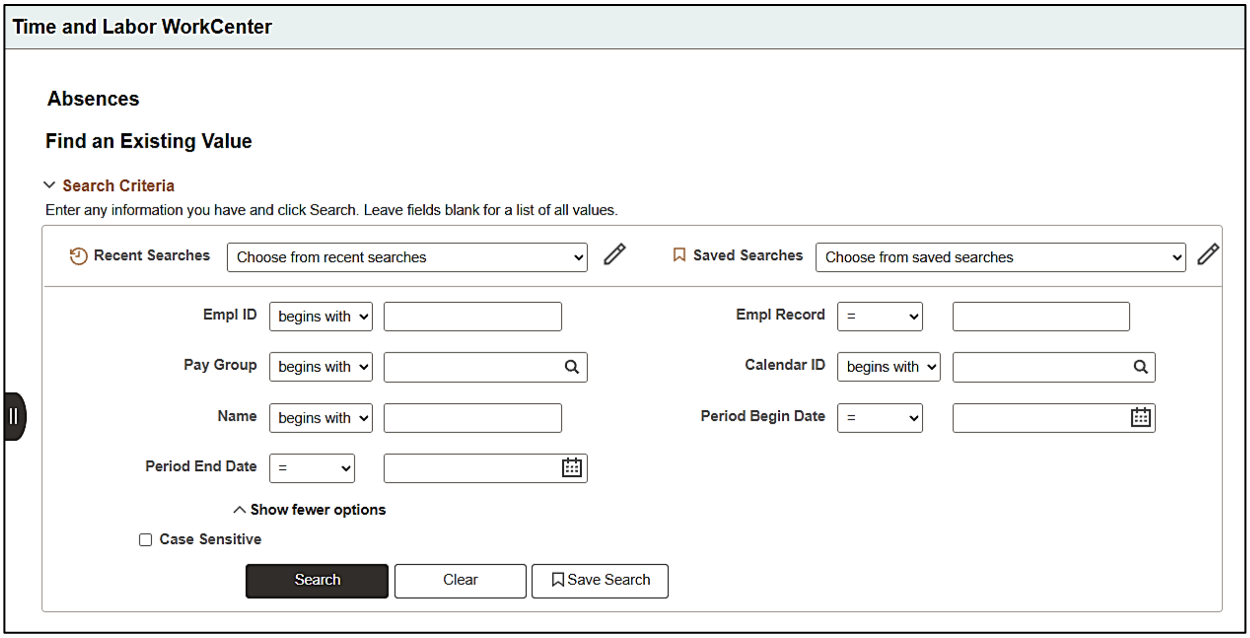
Do not include any PII in the comments.


</td></tr>
<tr><td>11.</td><td>Click the OK button.

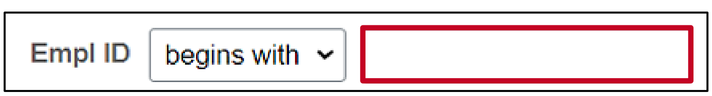

</td></tr>
</table>

Step	Action
	The **Absences** page redisplays. 
12.	Click the **Save** button. 
	Next, the adjustment must be made for the recipient to remove the unused hours.
13.	Click the **Return to Search** button. 

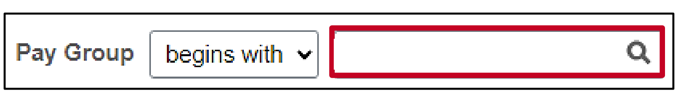
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The Absences Find an Existing Value Search page redisplays.

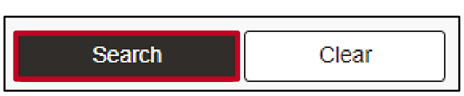

</td></tr>
<tr><td></td><td>If using the Clear button, capture the Calendar ID first as the Calendar ID of the leave recipient should match the Calendar ID for the employee who donated leave.</td></tr>
<tr><td>14.</td><td>Enter the Employee ID of the employee who is returning donated hours in the Empl ID field.

Note: Users can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

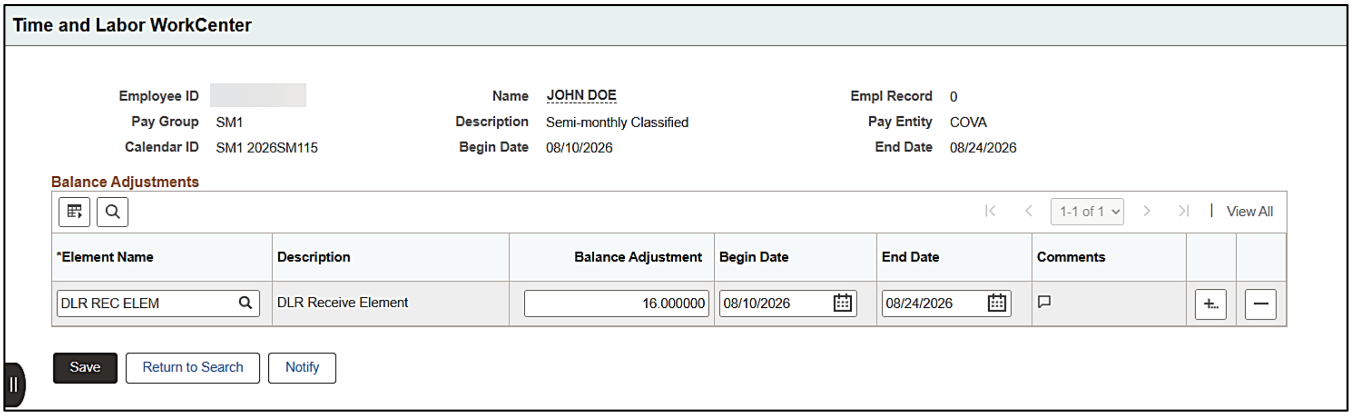

</td></tr>
<tr><td>15.</td><td>Update the Pay Group field as needed.

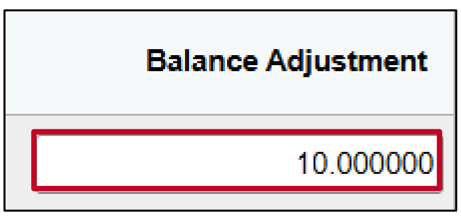
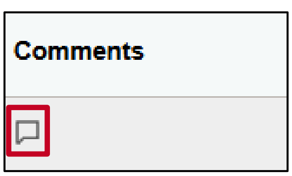
Note: Ensure that the selected Pay Group is consistent with the employee's Job Actions Summary page for the same timeframe.


</td></tr>
<tr><td>16.</td><td>Click the Search button.


</td></tr>
</table>

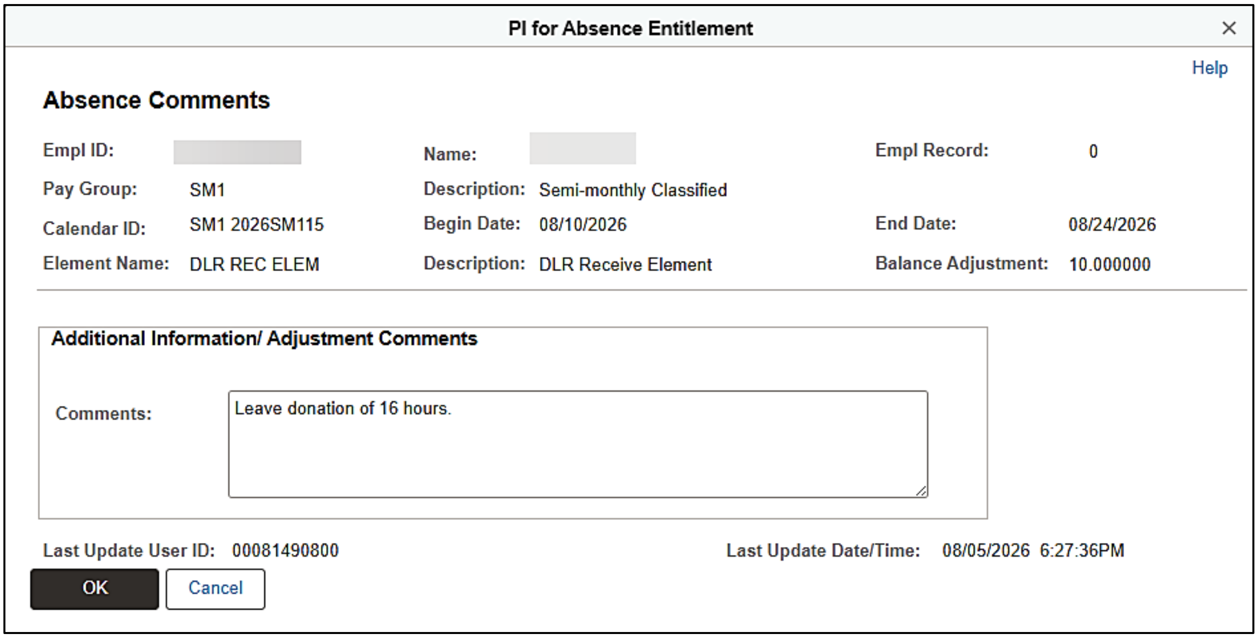
Step	Action
The **Absences** page displays for the applicable employee with the original leave receipt information.	



Step	Action
17.	Update the **Balance Adjustment** field by overwriting the original number of hours received with the number of unused hours being returned. In this scenario 16 hours were originally donated, but only 10 hours were used, 6 hours are being returned to the donor. Edit the existing balance adjustment from 16 to 10. 
18.	Click the **Comments** icon in the **Comments** field. 

Step	Action

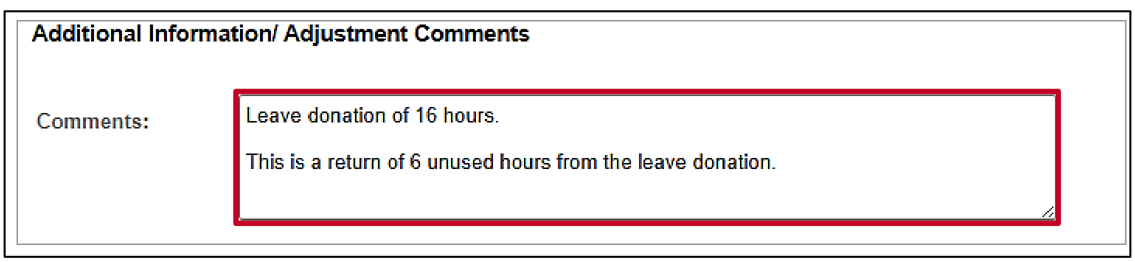
The **PI for Absence Entitlement** page displays in a pop-up window.



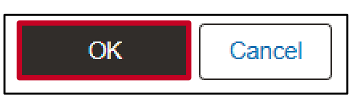
19. Enter a brief updated comment in the **Comments** field to document that this is a return of unused hours from a leave donation.

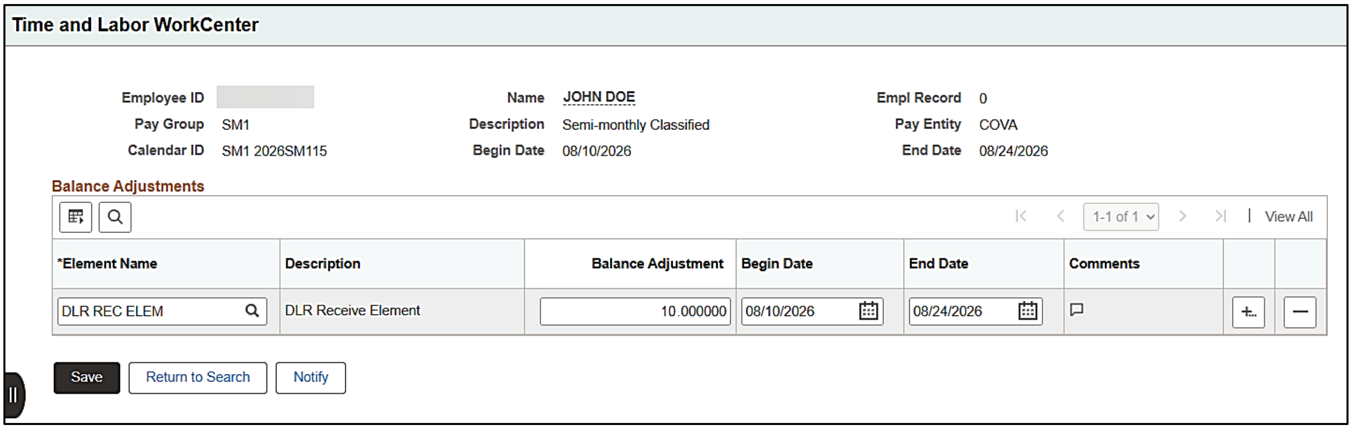
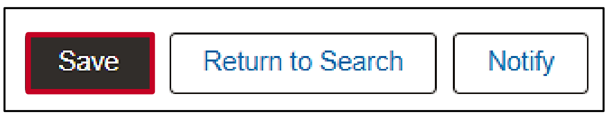
Note: When the **Comments** field is opened, the user will also see the comment from when the balance adjustment was originally keyed, this shouldn't be deleted. Add another comment after the original one.

Do not include any PII in the comments.



20. Click the **OK** button.



Step	Action
	The **Absences** page redisplays. 
21.	Click the **Save** button. 
	The return of unused hours from a leave donation process is now complete. Adjustments made in the current open Pay Period and prior Pay Periods will be processed the next time the Absence Calculation Process runs (runs nightly).

Managing Leave for Agency Transfers

The process covered in this section using the **Supporting Elements** page only applies to transferring VAC and Traditional Sick hours. This process allows transferred Vacation and Traditional Sick hours to be used in the first Pay Period in the new Agency.

Cardinal automatically entitles VSDP Sick, VSDP Personal, and CSL based on New Hire DHRM policy. Use the Manually Adjusting Existing Absence Entitlement Balances section of this Job Aid to adjust these balances to reflect the hours that the employee is transferring as needed.

To adjust absence balances for all other Leave Types, use the Entering a New Absence Entitlement section of this Job Aid. When employees transfer to another Agency, all absence balances should be reviewed and updated as needed.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>

To transfer Vacation (Annual Leave) or Traditional Sick balances for an employee transferring to another State Agency, navigate to the **Supporting Elements** page by clicking the **TA WorkCenter** tile.

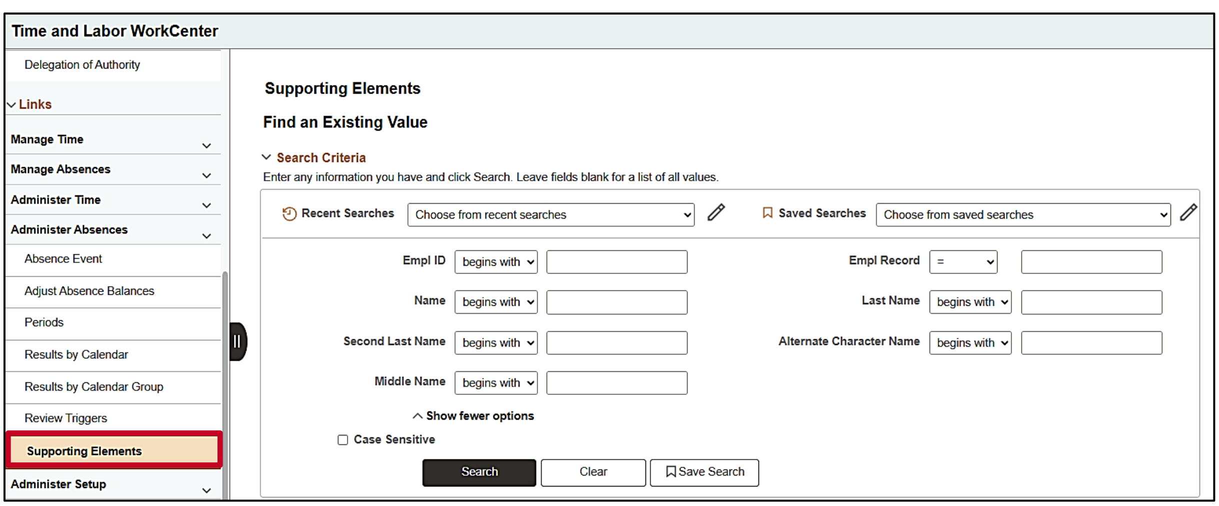
</td></tr>
<tr><td></td><td>

For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.

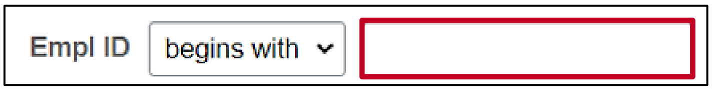
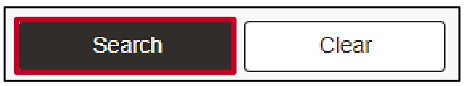
</td></tr>
<tr><td>2.</td><td>

Use the following navigation in the WorkCenter: **Links > Administer Absences > Supporting Elements**

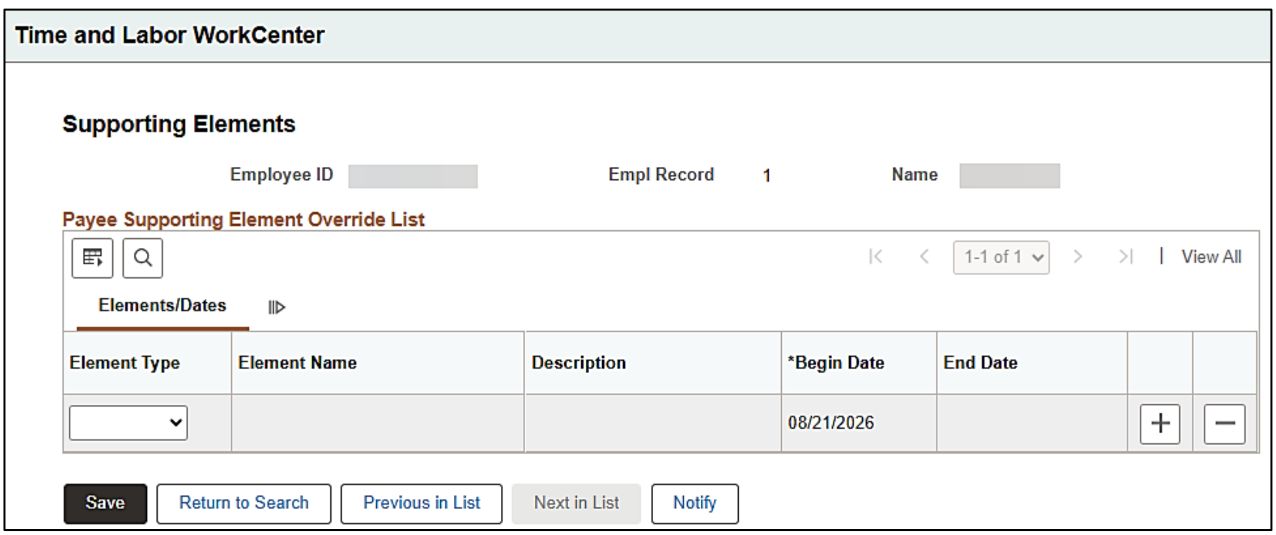
Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles.

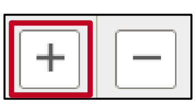


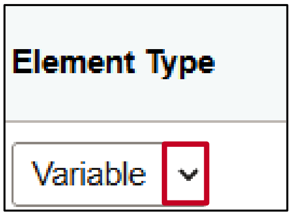
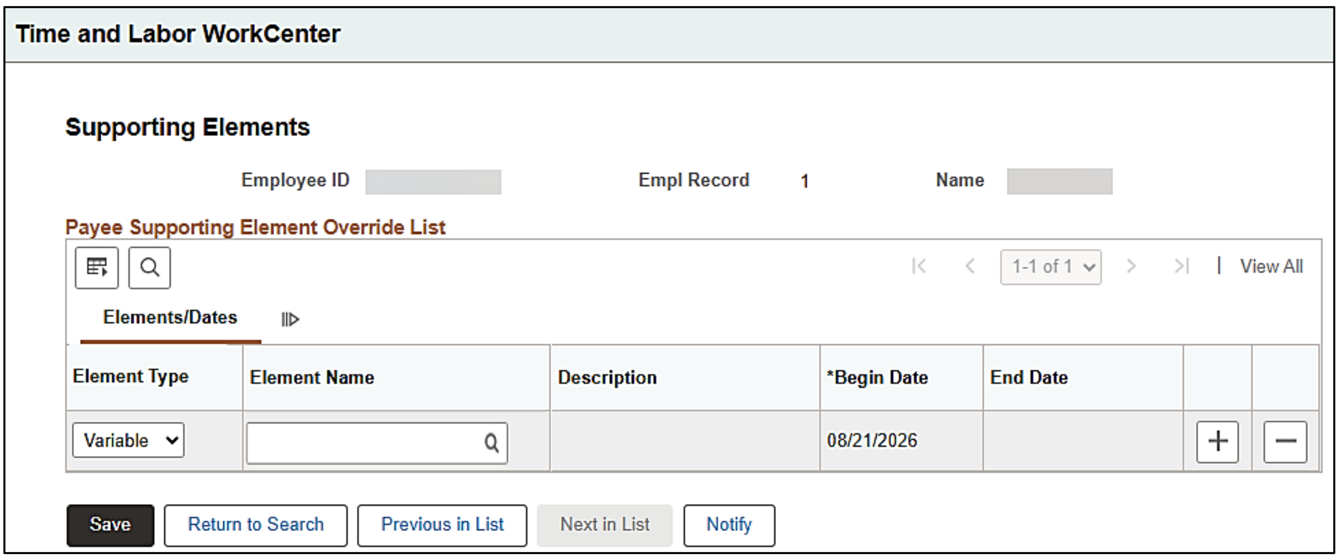
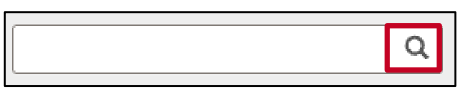
</td></tr>
</table>

Step	Action
ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
3.	Enter the applicable employee’s Employee ID in the **Empl ID** field. **Note**: The user can also search by Employee Record or name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 
4.	Click the **Search** button. 

The **Supporting Elements** page displays for the applicable employee with the **Elements/Dates** tab displayed by default.

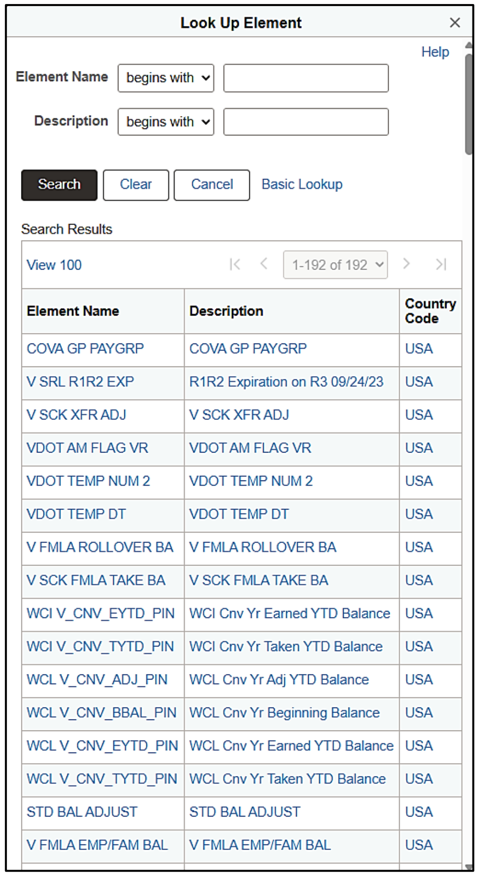


Step	Action
ℹ	If there are past elements on the page for the employee, click the **Add a New Row** (**+**) icon. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Click the Element Type dropdown button and select “Variable”.
</td></tr>
<tr><td colspan="2">The Supporting Elements page refreshes.
</td></tr>
<tr><td>6.</td><td>Click the Element Name Look up icon.
</td></tr>
</table>

Step	Action

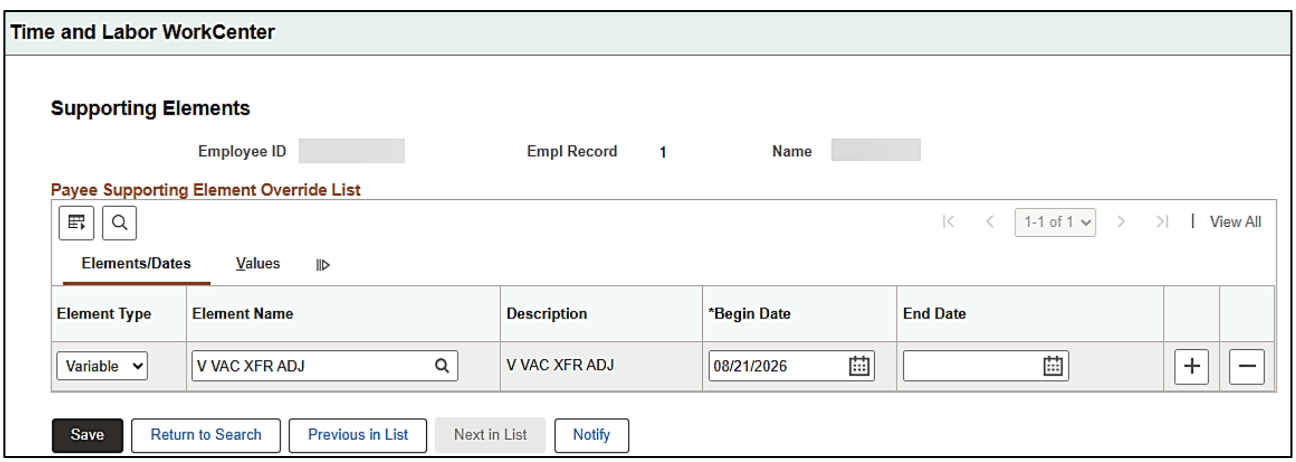
The **Look Up Element** page displays in a pop-up window.



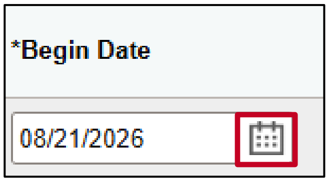
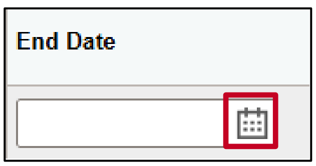
Step	Action
7.	Click the **V VAC XFR ADJ** link to transfer the Vacation balance or click the **V SCK XFR ADJ** link to transfer the Traditional Sick balance. For this scenario, the user is transferring the Vacation balance.

Element Name	Description	Country Code
V ERL R1R2 EXP	R1R2 Expiration on R3 09/24/23	USA
V FMLA EMP/FAM BAL	V FMLA EMP/FAM BAL	USA
V FMLA MILITARY BA	V FMLA MILITARY BAL	USA
V FMLA ROLLOVER BA	V FMLA ROLLOVER BA	USA
V SCK FMLA TAKE BA	V SCK FMLA TAKE BA	USA
V SCK XFR ADJ	V SCK XFR ADJ	USA
V SDP FMLA TAKE BA	V SDP FMLA TAKE BA	USA
V SRL R1R2 EXP	R1R2 Expiration on R3 09/24/23	USA
V STD TAKE BAL DAY	V STD TAKE BAL DAY	USA
V STD VAC ACR LMT	V STD VAC ACR LMT	USA
V VAC XFR ADJ	V VAC XFR ADJ	USA

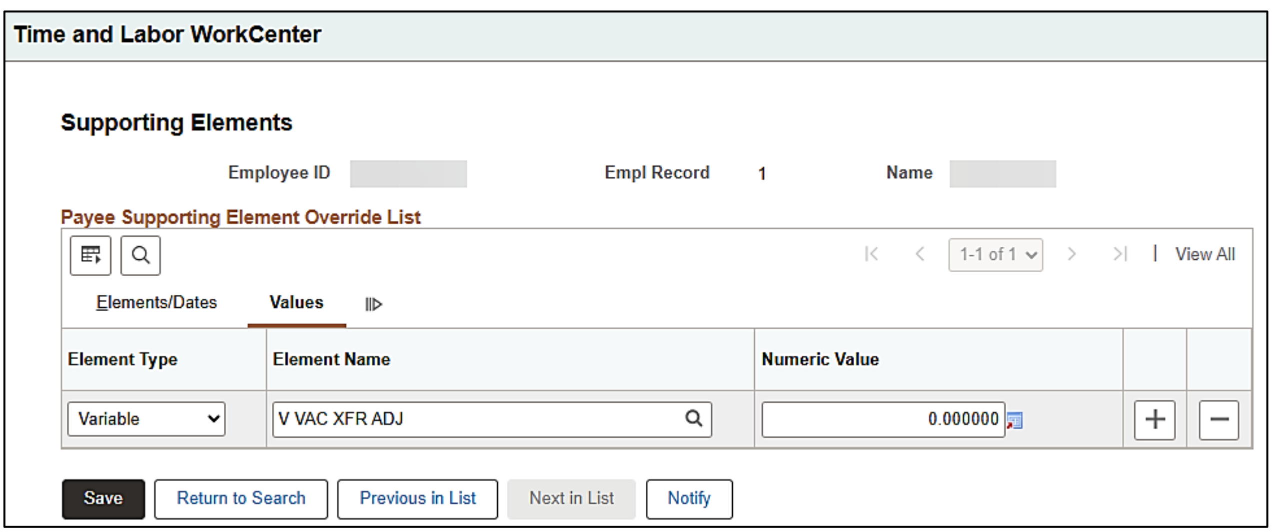
The **Supporting Elements** page redisplays.

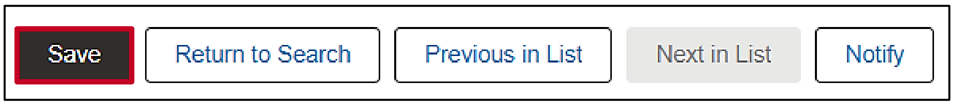


The **Begin Date** field defaults to the current date based on the current open Pay Period. The beginning date determines the date which the transferred balance can be used by the employee and should be the first day of the employee's first Pay Period at the new Agency.

Step	Action
8.	Click the **Begin Date Calendar** icon and select the applicable begin date. 
ℹ	The end date should correspond to the Pay Period end date. If the **End Date** field is left blank, the employee will receive the balance each Pay Period. If the begin date and end date span multiple Pay Periods, the employee will receive the balance adjustment each Pay Period beginning with the begin date and ending with the end date.
9.	Click the **End Date Calendar** icon and select the applicable end date. 
10.	Click the **Values** tab. 

The **Values** tab displays.



Step	Action
11.	Enter the number of hours the employee is transferring from the previous Agency in the **Numeric Value** field for the corresponding row. 
12.	Click the **Save** button. 

Managing Leave for Employees Who Work Fewer than 12 Months a Year

Agencies have two options for managing leave for employees who work fewer than 12 months a year. The Absence Administrator should work with the Agency HR Administrator for the applicable option for the employee. The steps below will be performed by the HR Administrator.

1. HR Administrators can enroll the employee in the “FACREGGRP” or “FACVSDPGRP” Eligibility Group and AM Administrators can manually adjust their balances.

   The **Leave Balance Adjustment Mass Upload** can be used for employees in the “FACREGGRP” or “FACVSDPGRP” Eligibility Group to manually adjust their FVC Flex Vacation Absence balance. FVC is a Leave Type that does not automatically accrue semi-monthly. FVC can be used by employees who work less than 12 months per year or can be used by Agencies that do not follow or do not fully follow DHRM leave policy but still track leave in Cardinal.

2. HR Administrators can update the employee’s record on the **Job Actions Summary** page by adding a new effective dated row and updating the employee’s Eligibility Group from “VSDPELGGRP” to “FACREGGRP”. The “FACREGGRP” Eligibility Group does not include VAC accrual, VSDP PER, or VSDP Sick Leave. HR Administrators will need to add another effective dated row to return the employee to the “VSDPELGGRP” Eligibility Group upon their return to work.

   HR Administrators can update **Job Data** in one of two ways.

   a. If there is a large number of employees, the **Job Data Mass Upload** can be used to update the Eligibility Group
   b. HR Administrators can update each employee record individually by completing the steps on the **Job Actions Summary** page.

Zeroing Out Balances

Employee leave and absence balances should be zeroed out when an employee is terminated.

Important Notes:

- Ensure all leave has been entered, approved, and processed, and all payouts have been completed through SPOT.
- Balances older than one year cannot be zeroed out.

Zeroing Out Balances Using the Leave Balance Zero-Out Page

Compensatory Leave, Overtime Leave and absence balances can all be zeroed out using the **Leave Balance Zero-Out** page by following the steps in the Zeroing Out Balances using the Leave Balance Zero-Out Page section of this Job Aid.

Zeroing Out Balances Manually

Compensatory Leave and Overtime Leave balances can be manually zeroed out by a TL/AM Administrator on the employee's last active day using the appropriate pay out TRC on the timesheet. Please see the Zeroing Out Compensatory and Overtime Leave Balances on the Timesheet section of this job aid for step-by-step instructions.

Absence Balances can be zeroed out manually on the Adjust Absence Balances page. Follow the steps in the Entering a New Absence Entitlement section of this job aid and apply these additional guidelines:

- **Calendar Period**: For a terminated employee, select the Pay Period that contains the employee's last day active in HR Status
- **Balance Adjustment** field: Enter the number of hours equal to the employee's current entitlement balance as a negative number
- **Comments** field: Enter a comment pertaining to the reason for zeroing out the balance (e.g., employee terminated)

Zeroing Out Balances using the Leave Balance Zero-Out Page

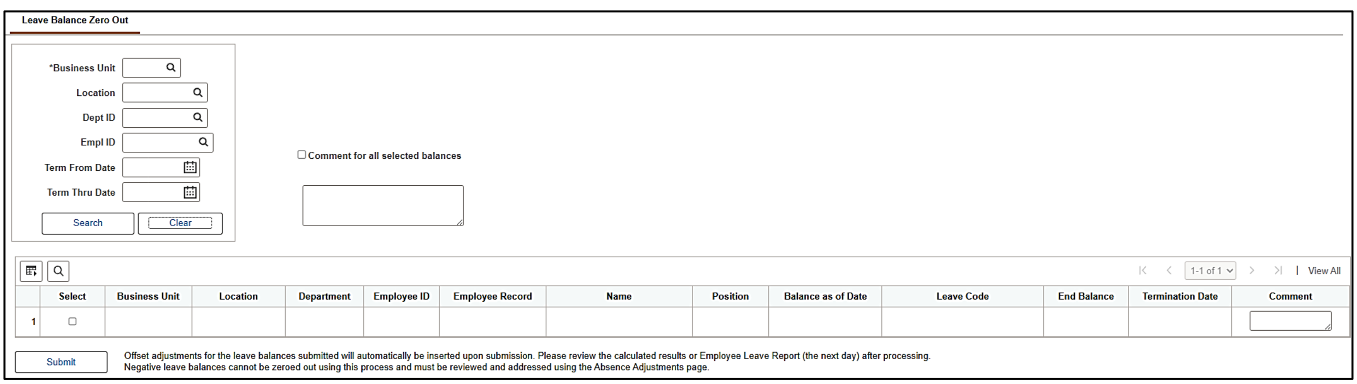
The Leave Balance Zero-Out Automation page allows AM Administrators to select terminated employees with remaining balances that need to be zeroed out. When submitted, the system automatically inserts the corresponding offset adjustments for processing.

Important Notes:

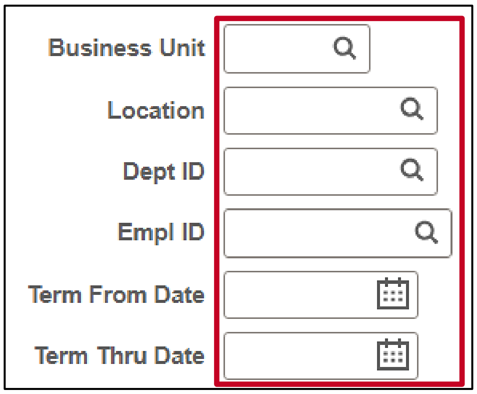
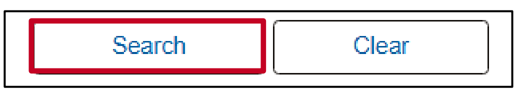
- Ensure all leave has been entered, approved, and processed, and all payouts have been completed through SPOT, before using this page.
- Negative balances cannot be processed using this page. These must be corrected manually on the **Absence Adjustment** page by adjusting the previously keyed balance adjustment. Negative balances are the result of a balance adjustment keyed incorrectly. This is corrected by editing the existing balance adjustment.
- Balances older than one year cannot be zeroed out and will not display on the **Leave Balance Zero-Out Automation** page.

Step	Action
1.	Navigate to the **Leave Balance Zero-Out Automation** page to automatically zero out remaining balances for terminated employees using the following path: **NavBar > Menu > Global Payroll & Absence Mgmt > Leave Balance Zero-Out**

The **Leave Balance Zero-Out Automation** page displays.



	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
2.	Enter search criteria from the following fields: a. **Business Unit** (required) b. **Location** c. **Dept ID** d. **Employee ID** e. **Term From Date / Term Thru Date** **Note**: Broad searches (e.g., Agency-wide) may take longer and could time out. Users can expedite the search by entering more specific criteria to narrow the parameters. 
3.	Click the **Search** button. 
	The system displays terminated employees with non-zero leave balances in leave periods within the past year. Negative balances will display but cannot be selected. AM Administrators will need to review absence data for employees with negative balances and manually adjust the balances using the **Absences** page.

The search results display in the **Search Results** section.

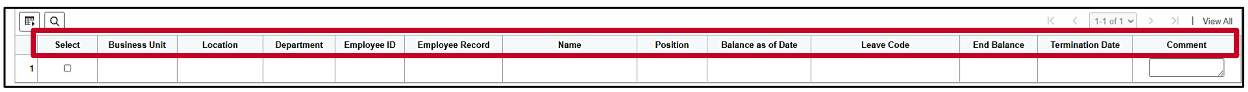
1-10 of 22 | View All

	Select	Business Unit	Location	Department	Employee ID	Employee Record	Name	Position	Balance as of Date	Leave Code	End Balance	Term Date	Comment
1	☐	77700	BAJCC	50712		0			12/09/2025	VAC ENT ELEM	16.000	12/05/2025	
2	☐	77700	BAJCC	50712		0			12/09/2025	SDP ENT ELEM	40.000	12/05/2025	
3	☐	77700	BAJCC	50712		0			12/09/2025	PER ENT ELEM	16.000	12/05/2025	
4	☐	77700	BAJCC	50712		0			12/09/2025	CSL ENT ELEM	16.000	12/05/2025	
5	☐	77700	BAJCC	50712		0			12/09/2025	VAC ENT ELEM	38.500	11/30/2025	
6	☐	77700	BAJCC	50712		0			12/09/2025	CSL ENT ELEM	16.000	11/30/2025	
7	☐	77700	BAJCC	50712		2			12/09/2025	VAC ENT ELEM	40.000	11/28/2025	
8	☐	77700	BAJCC	50712		2			12/09/2025	SDP ENT ELEM	41.000	11/28/2025	
9	☐	77700	BAJCC	50712		2			12/09/2025	PER ENT ELEM	12.500	11/28/2025	
10	☐	77700	BAJCC	50712		2			12/09/2025	CSL ENT ELEM	16.000	11/28/2025	

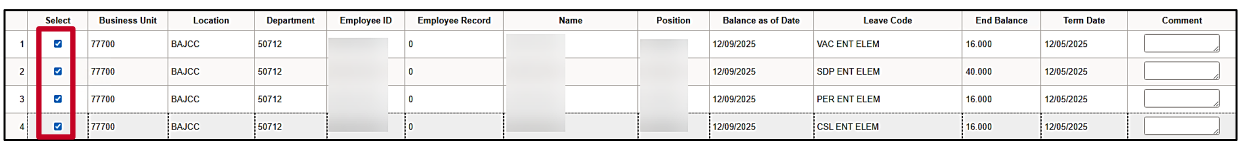
Step	Action

6. Review the results. Columns displayed include:

- Business Unit
- Location
- Department
- Employee ID
- Employee Record
- Name
- Position
- Balance Date
- Leave Code
- Leave Balance
- Term Date



7. Select the checkbox(s) under the **Select** Column for the balances to zero out for the applicable employee(s).

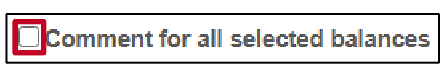


	Select	Business Unit	Location	Department	Employee ID	Employee Record	Name	Position	Balance as of Date	Leave Code	End Balance	Term Date	Comment
1	☑	77700	BAJCC	50712		0			12/09/2025	VAC ENT ELEM	16.000	12/05/2025	
2	☑	77700	BAJCC	50712		0			12/09/2025	SDP ENT ELEM	40.000	12/05/2025	
3	☑	77700	BAJCC	50712		0			12/09/2025	PER ENT ELEM	16.000	12/05/2025	
4	☑	77700	BAJCC	50712		0			12/09/2025	CSL ENT ELEM	16.000	12/05/2025	

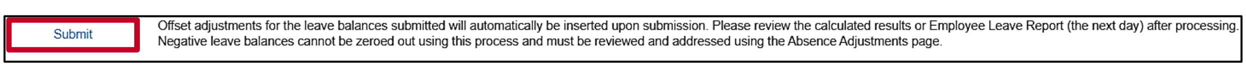
The **Select All** checkbox is available when searching by Employee ID (excludes negative balances).

8. Enter a brief comment in the **Comment** field.

Note: Enter a comment for each selected transaction OR select the checkbox **Comment for all selected balances** and enter one comment for all transactions.

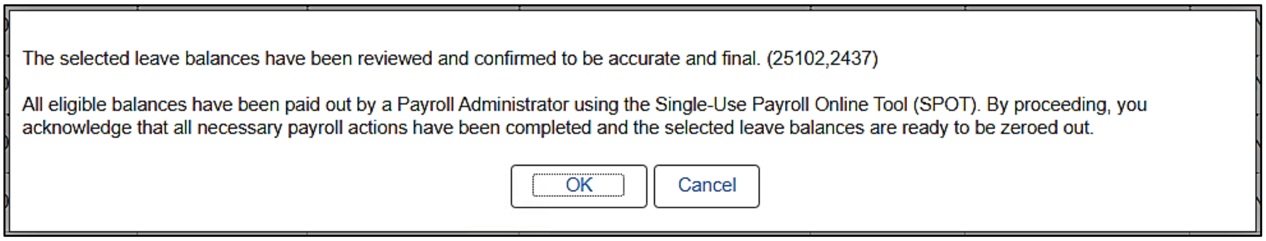


9. Click the **Submit** button. Review the message next to the **Submit** button on how the leave balances are processed and what needs to be reviewed after processing.

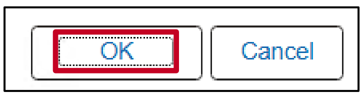


Step	Action

A certification message displays in a pop-up window. Confirm that balances are accurate and eligible payouts have been processed via SPOT.



10. Click the **OK** button to certify and submit.

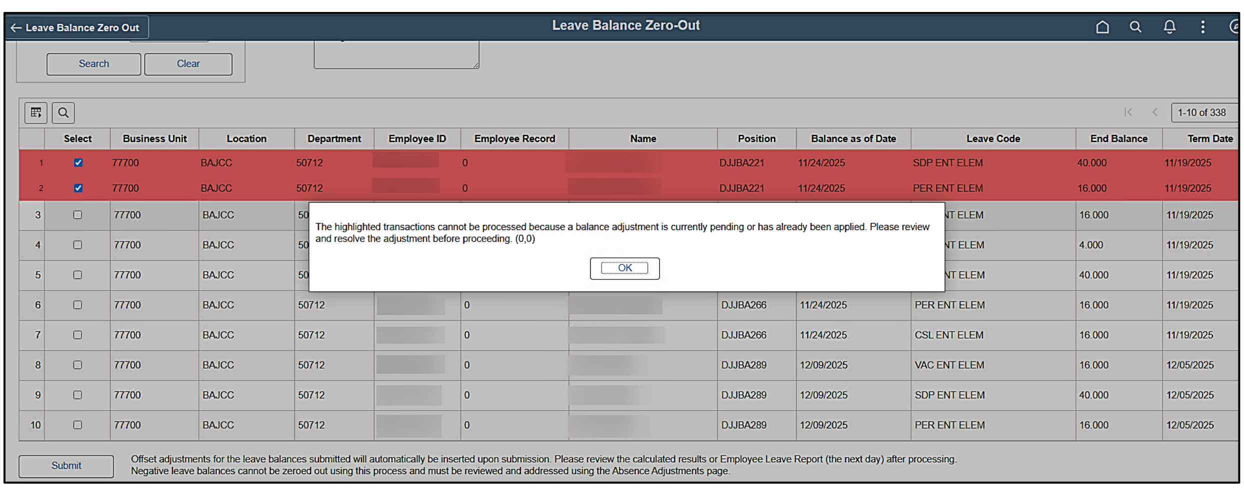


The system automatically inserts adjustments:

- For **Time & Labor**: Inserts rows in Reported Time using TRCs (CPO for Comp Time Leave Payout, or OPO for Overtime Leave Payout). These can be viewed on the **Timesheet** or via the Time Entry Audit.
- For **Absence Management**: Inserts the negative balance adjustments on the **Absences** page.

If a balance adjustment has already been keyed but has not yet been processed or the balance adjustment has been processed but the employee still has a balance, the row(s) will be highlighted in red to alert the user that a balance adjustment has been keyed and should be reviewed and edited as needed.

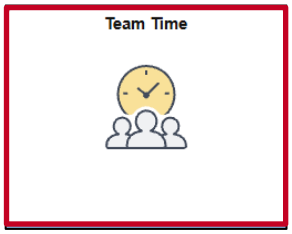
The Time Administration Process runs every 2 hours, and the Absence Calculation Process runs each night.



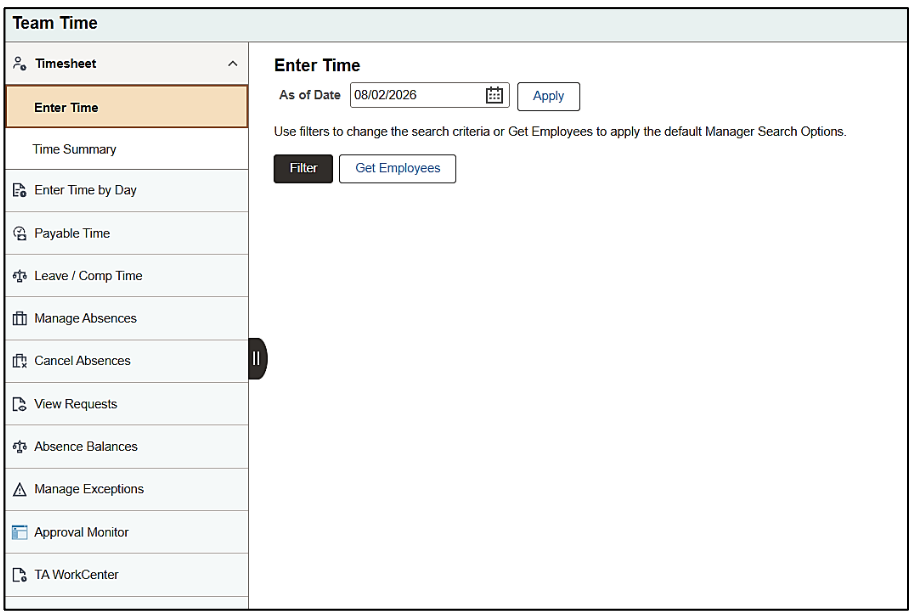
Zeroing Out Compensatory and Overtime Leave Balances on the Timesheet

Ensure all leave has been entered, approved, and processed, and all applicable payouts have been completed through SPOT, before zeroing out balances.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1.</td><td>Click the Team Time tile.

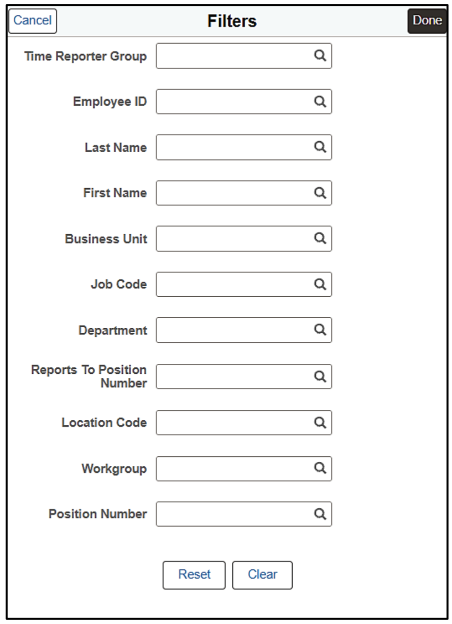


</td></tr>
<tr><td colspan="2">The Enter Time page displays.



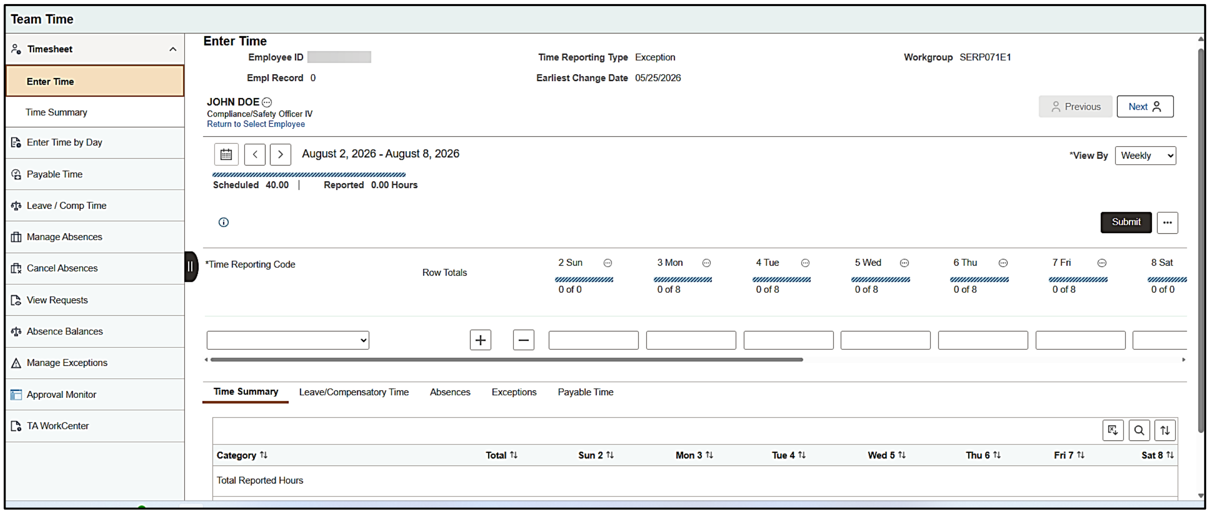
</td></tr>
<tr><td>2.</td><td>Click the Get Employees button or the Filter button to pull up the employee.
In this scenario, click the Filter button.

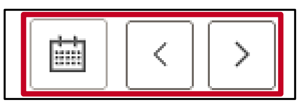
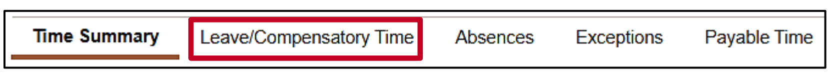
</td></tr>
</table>

Step	Action
	The **Filters** page displays in a pop-up window. 
3.	Enter the applicable employee's Employee ID in the **Employee ID** field. **Note**: Users can also search by name or by using one of the other corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. 
4.	Click the **Done** button in the top right corner of the page. 

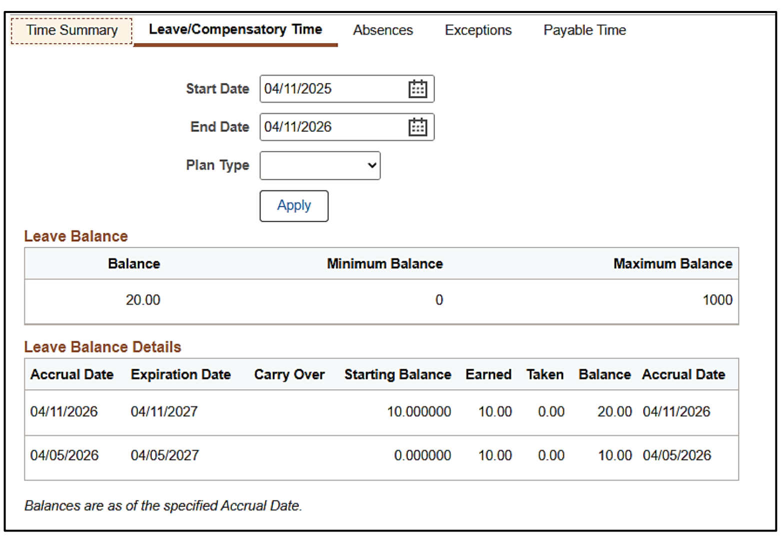
Step	Action

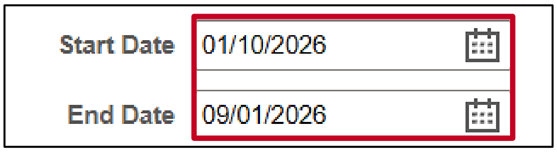
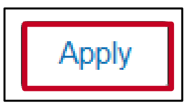
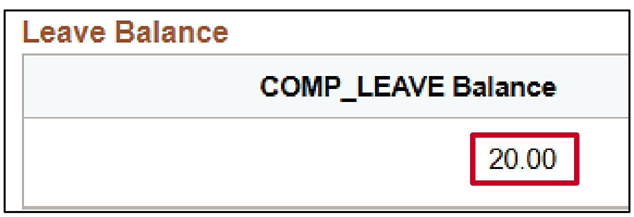
The **Enter Time** page displays for the applicable employee.

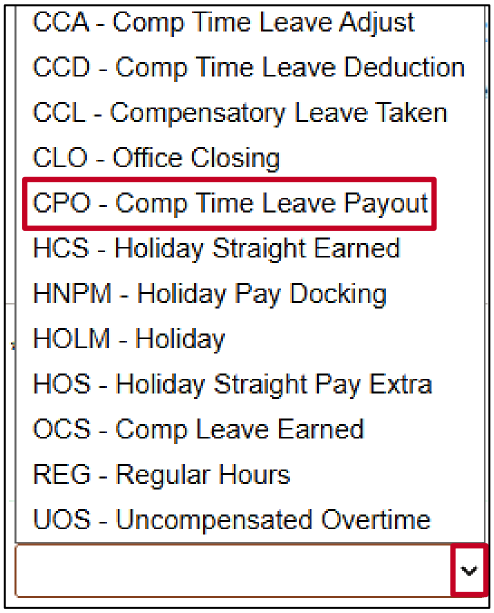
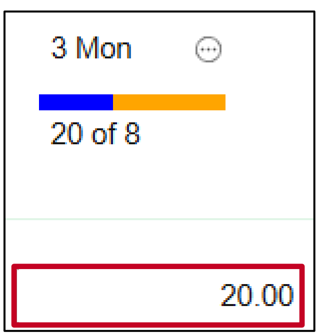
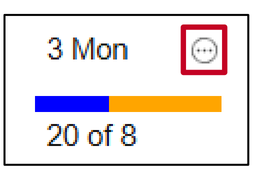


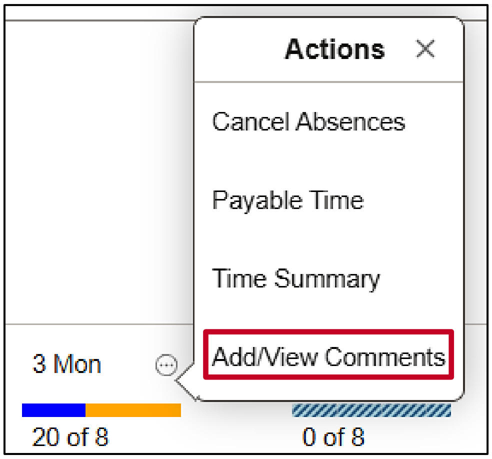
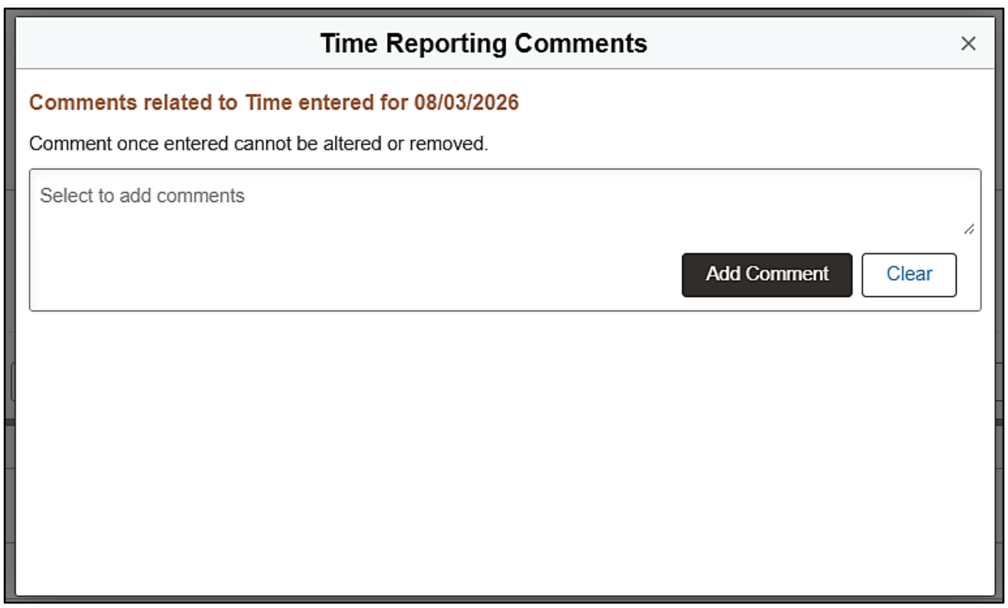
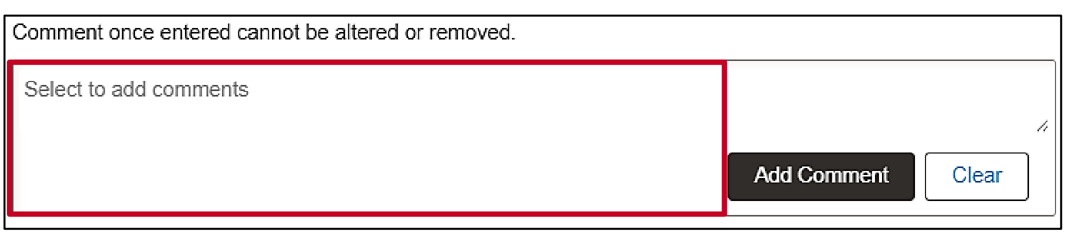
Step	Action
5.	Use the **Calendar** icon or **Previous** or **Next** buttons as needed to select the Timesheet for the week that contains the employee's last day of work. 
6.	Click the **Leave / Compensatory Time** tab. 

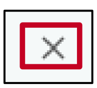
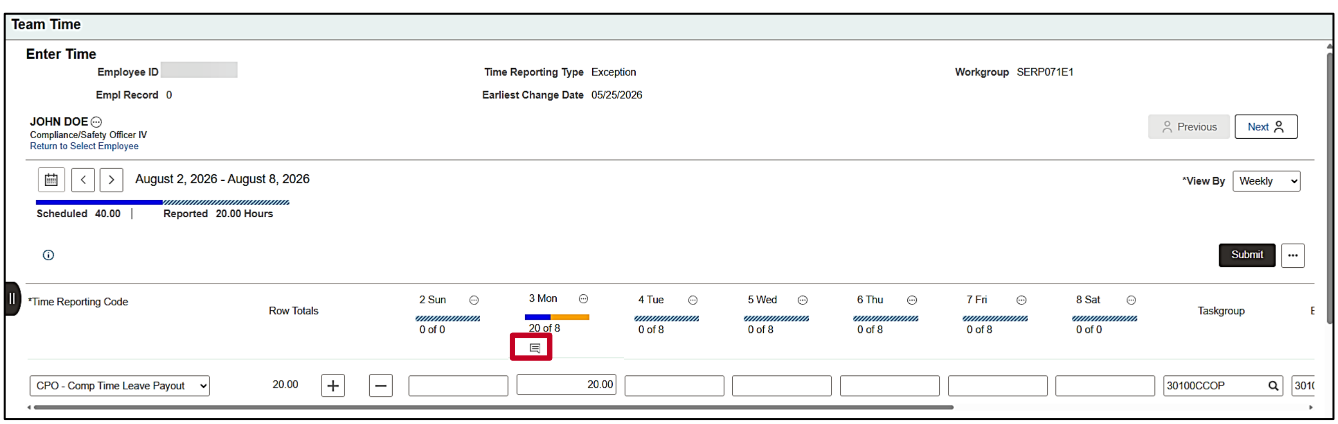
The **Leave / Compensatory Time** tab displays.

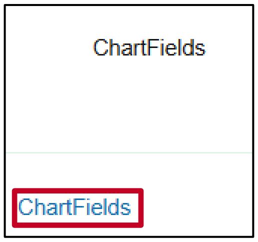


Step	Action
7.	Change the dates as needed by clicking on the **Calendar** icon or entering the dates in the **Start Date** and **End Date** fields. 
8.	Click the **Plan Type** dropdown button and select the applicable leave. 
9.	Click the **Apply** button. 
10.	Review the employee's current balance under the **Leave Balance** section in the **COMP_LEAVE Balance** field. Then scroll up to the Timesheet grid to enter the **Time Reporting Code** (TRC) and hours. 

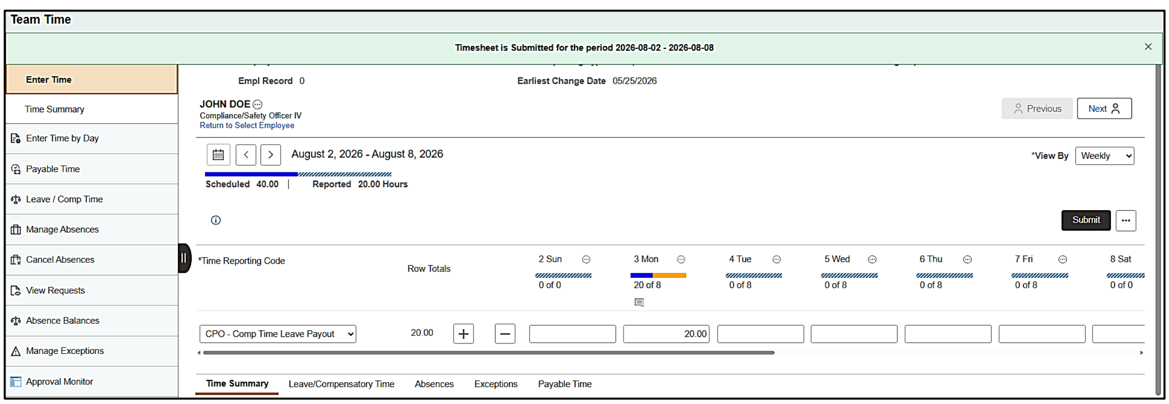
Step	Action
11.	Click the **Time Reporting Code** dropdown button and select “CPO” for Comp Time Leave Payout or “OPO” for Overtime Leave Payout. 
12.	Enter the number of hours being paid out (equal to the current balance) in the applicable **Day** field (employee’s last day of work) within the Timesheet grid. **Note**: Users can enter a value greater than 24 hours on that day in order to accommodate a full payout. 
	Zero out the balance on the last day the employee was active in HR Status.
13.	Click the **Related Actions** icon next to the day. 

Step	Action
14.	The **Actions** menu displays in a pop-up window. Click **Add/View Comments**. 
The **Time Reporting Comments** page displays in a pop-up window.  	
15.	Enter a brief comment to document the reason for the payout in the **Comment** field. **Note**: Do not include any PII in the comments. Once entered, comments cannot be altered or removed. 

Step	Action
16.	Click the **Add Comment** button. 
The **Time Reporting Comments** page redisplays. 	
17.	Click the **X** in the top right corner of the **Time Reporting Comments** page. 
The **Enter Time** page redisplays with the comment added under the applicable **Day** field. 	

Step	Action
18.	If ChartFields are optional or required for the employee, a **ChartFields** link will display on the Timesheet. If the **ChartFields** link displays on the Timesheet and is required, click the **ChartFields** link and enter the ChartField Details. 
	For more information pertaining to entering ChartField Details, refer to the Job Aid titled **TA371 Entering ChartField Details on the Timesheet**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
19.	Click the **Submit** button. 

A message displays at the top of the **Enter Time** page indicating the time has been submitted.



Step	Action
20.	Scroll down to the **Time Summary** tab and review to ensure the time has been submitted correctly.