TA374
Absence Management Maintenance

Instructor Led Training

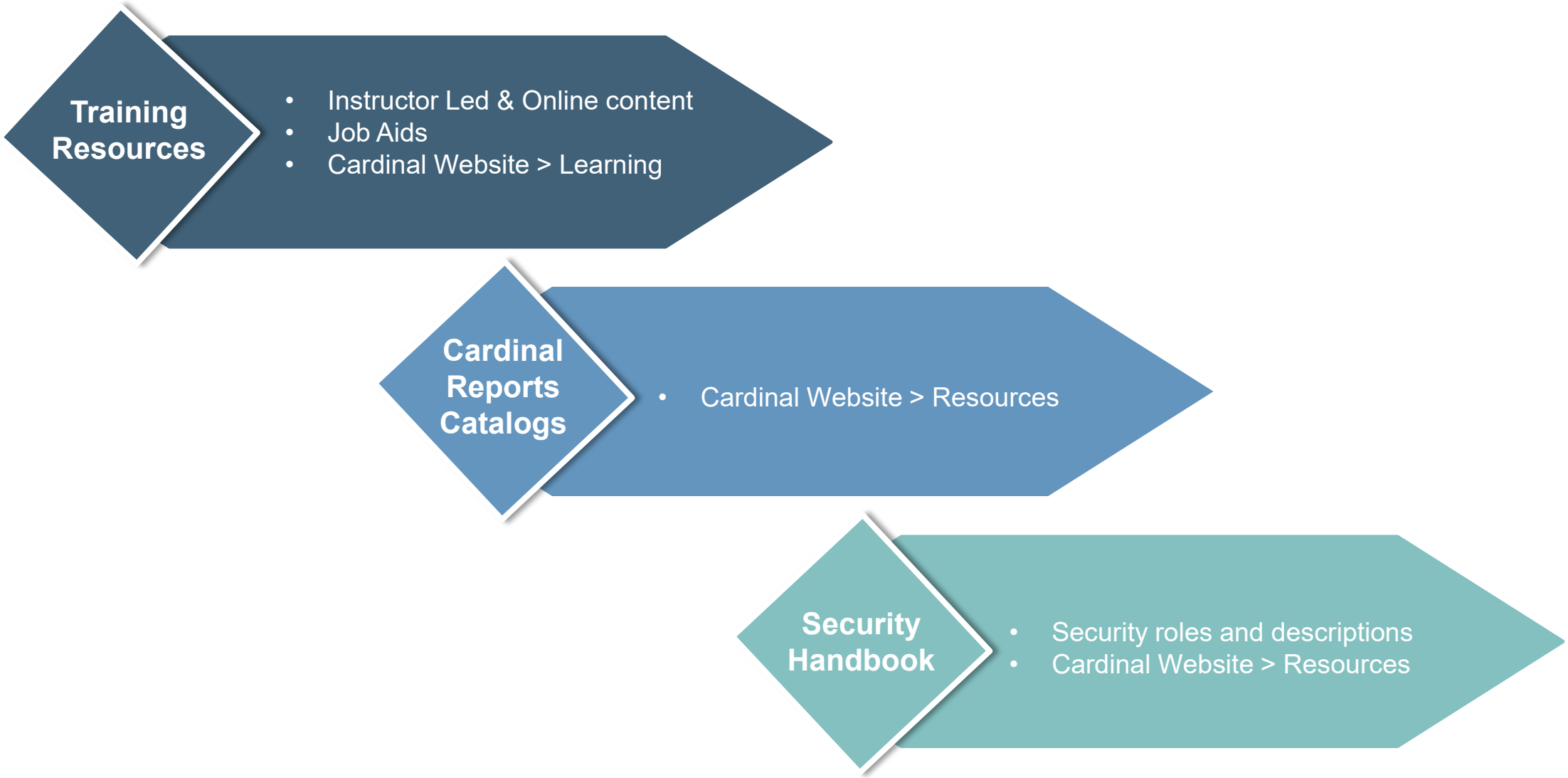
Rev. 11/24/2026

Revision History

Revision Date	Summary of Changes
11/24/2026	Updated to reflect the Cardinal system upgrades.
5/8/2026	Added new section on the Leave Balance Zero Out page.
2/19/2026	Added two new exercises to the course: Viewing Absence Events for an employee and Voiding an Absence Event.
11/17/2025	Baseline

Welcome to Cardinal Training

This training focuses on how to use Cardinal. It does not replace Commonwealth and/or Agency policy.



Making the Most of Our Time Together



Stay in the Zone

- Your focus helps us catch the small details that make a big difference.



Curiosity is Encouraged

- Ask questions. If you are thinking it, someone else probably is too.



Bring your Agency Perspective

- Be honest and open-minded. Your constructive feedback helps us build better training and communications.



Leave your Mark

- Complete the post-session survey, ensuring your agency's voice is officially captured in our planning.

Course Objectives

After completing this course, you will:

- Understand the Absence Management Administrator Role
- Understand how to Maintain Absences and Manage Leave in Cardinal
- Understand how to Review Leave Balances
- Understand how to Manage Leave and Absence Balances for Termed Employees
- Understand the Calculate Absence and Payroll Processes

Agenda

1. Time and Attendance Overview
2. Managing Absence Balances
3. Managing Absence Events and Leave
4. Reviewing Leave and Absence Balances
5. Managing Leave and Absence Balances for Termed Employees
6. Calculating Absence and Payroll Processing

Lesson

1 Time and Attendance Overview

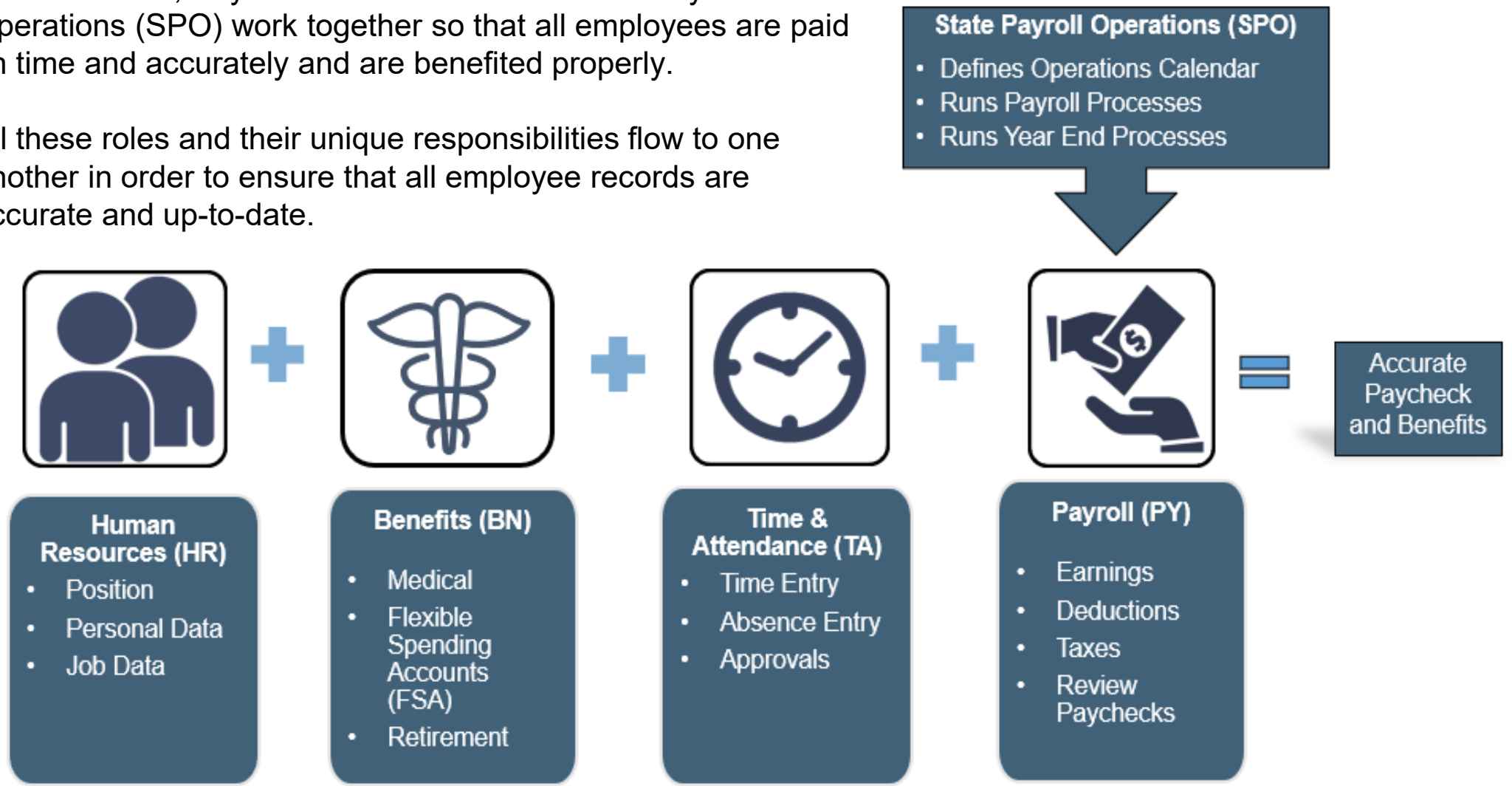
This lesson covers:

- Overview of Cardinal HCM
- TA Setup and Processing
- Absence Management Roles and Responsibilities

Cardinal HCM Responsibilities and Relationships

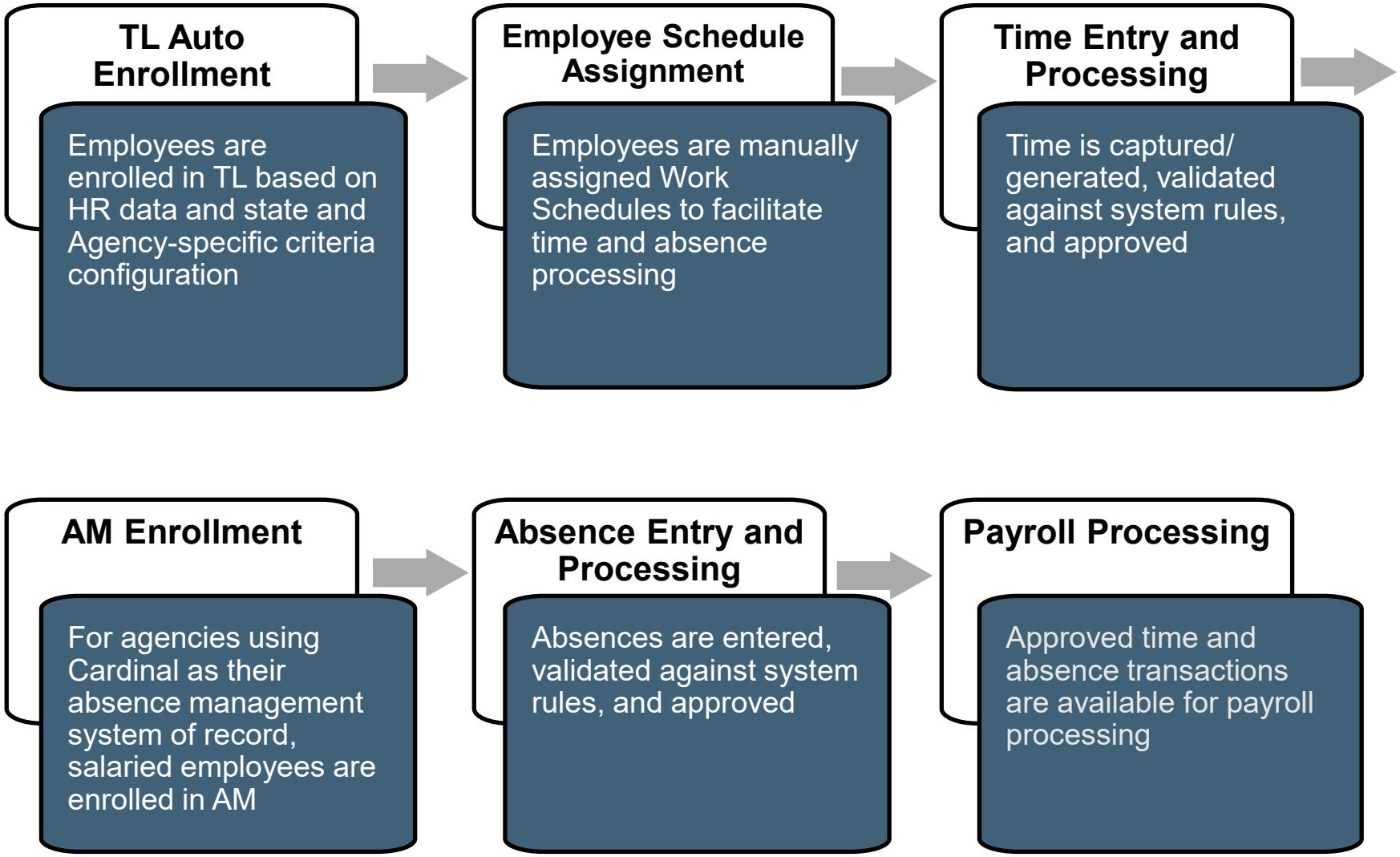
In Cardinal HCM, HR Administrators, BN Administrators, TL Administrators, Payroll Administrators and State Payroll Operations (SPO) work together so that all employees are paid on time and accurately and are benefited properly.

All these roles and their unique responsibilities flow to one another in order to ensure that all employee records are accurate and up-to-date.



TA Setup and Processing

The flowchart below shows the flow for Time & Attendance from employee setup through data being sent to Payroll for processing. In this course, our focus is on absence entry and processing.



Absence Management Roles and Responsibilities

Absence Management Employee/Timekeeper	Absence Management Supervisor	Absence Management Administrator
• Enter and modify absence requests • Cancel absence requests • Enter and modify leave earn and takes • View compensatory and overtime leave balances • View absence information and balances • Run Time and Attendance reports and queries (Timekeeper only)	• Enter/Cancel/Modify/Approve absence and leave for direct reports • Review direct reports' absence balances and history • Delegate approval authority to another Reports To Supervisor • Run Time and Attendance reports and queries	• Enter/Edit Admin only TRCs on the timesheet • Enter/Modify/Approve/Void/Delete/absence requests on the Absence Event page • View/Adjust absence balances • View Absence Calculation results • Run Time and Attendance reports and queries

Lesson Summary

1 Absence Management Overview

In this lesson, you learned:

- An overview of Cardinal HCM
- The TA Setup and Processing
- The Role of the Absence Management Administrator

Lesson

2 Managing Absence Balances

This lesson covers:

- Absence Entitlements and Accrual Overview
  - Managing Leave for Agency Transfers
- Manually Adjusting an Existing Absence Entitlement Balance
- Entering a New Absence Entitlement
- Managing Recognition Leave
- Managing Leave Donation

Managing Absence Balances – Eligibility Groups

Salaried employees in agencies using Cardinal Absence Management (applicable to both online and interfacing absence agencies) are enrolled in Absence Management on their Job Data record and assigned an AM Eligibility Group. The AM Eligibility Group is used to identify the group of absence entitlements and absence takes the employee is eligible for.

Eligibility Groups:

VSDPELGGRP VSDP Eligibility Group	Assign to employees eligible for VSDP Personal and Sick leave entitled annually and Vacation (annual leave) accrued semi-monthly per DHRM policy. Assign to employees that transferred from the Traditional Sick leave program to the VSDP program and converted Traditional Sick Leave hours to disability credits or were paid out for Traditional Sick leave balances at the time of transfer.
TRADELGGRP Traditional Eligibility Group	Assign to employees with the grandfathered Traditional Sick leave program who accrue Traditional Sick leave semi-monthly per DHRM policy and did not opt into the VSDP program.
EXECELGGRP Executive Eligibility Group	Assign to Gubernatorial Appointees ("at-will") in the Executive Leave program eligible for VSDP personal and sick leave entitled annually but not Vacation (annual leave) which is accrued semi-monthly. The Annual Leave Incentive Absence Leave Type can be adjusted manually to grant annual leave hours in the appropriate amount and frequency (e.g., lump sum annually in first period of the leave year or upon becoming an appointee).
FACREGGRP Flex Regular Eligibility Group	Assign to employees who do not do not follow DHRM policy for any Absence Leave Types and follow Agency-specific leave plans in terms of amount and frequency of entitlements (e.g., faculty employees, at-will employees not eligible for VSDP Personal and Sick leave). This group does not have any leave types that automatically accrue or entitle; balances for eligible Absence Leave Types must be manually adjusted.
FACVSDPGRP Flex VSDP Eligibility Group	Assign to employees eligible for VSDP Personal and Sick leave entitled annually per DHRM policy, but do not follow DHRM policy for other Absence Leave Types and follow Agency-specific leave plans in terms of amount and frequency of entitlements (e.g., faculty employees). Balances for eligible Absence Leave Types, other than VSDP Personal and Sick leave, must be manually adjusted.

JOB AID REFERENCES

- TA374 Absence Management Leave Types & Eligibility
- TA792 Leave Balance Adjustment Mass Upload Template

Managing Absence Balances

New Hire

- Receive entitlements based on their Eligibility Group and DHRM's new hire policy
- Eligible employees receive their entitlements in the leave period of their hire date
- Eligible employees accrue when they have been active a full leave period

Transfer

- Receive entitlements based on their Eligibility Group and DHRM's new hire policy
- Eligible employees receive their entitlements in the leave period of their hire date
- Eligible employees accrue when they have been active a full leave period
- The receiving agency AM Admin must review the balances provided by the sending agency and manually adjust the employee's balances as appropriate. Balances do not transfer between agencies automatically in Cardinal.

Existing employee

- Receive entitlements based on their Eligibility Group and DHRM's current employee policy at the beginning of the leave year, January 10



Absence Entitlement Balances Adjustments

There are various reasons 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, Organizational 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
- An employee is in a Flex eligibility group that requires management of absence balances



AM Administrators have access to enter balance adjustments up to one year from the current open leave period. The Absence Calculation Process has a one - year retro processing limit.

Managing Absence Balances – Balance Adjustments

Not all absence types are granted based on an annual entitlement or accrual; some absence balances must always be managed by the AM Administrators. The absence types entitled or accrued are based on the employee's Eligibility Group assigned in job data.

Examples of absence types that require manual set up include:

ELP (Educational Leave)
ALI (Annual Leave Incentive)
MIL (Military Leave)
ERL (Organizational Recognition Leave)
PAR (Parental Leave)

JOB AID REFERENCES

- Performing a Mass Upload
- TA374 Managing Absence Balances
- TA374 Absence Management Leave Types & Eligibility

When Entitlement Balances are Processed

Understanding when entitlements are processed will help you determine the appropriate period to apply an adjustment.

Processed at the end of the pay period:

- Vacation (VAC)
- Traditional sick (SCK)

All other absence types are processed at the beginning of the pay period.



Balance Adjustments

The following three pages are used to adjust an employee's absence/leave balances:

- **Enter Time** page (Timesheet): Is used to adjust compensatory and overtime leave balances
- **Supporting Elements** page: Is used to adjust balances for transferring employees' vacation and sick balances so they are available for use during the employees leave period of hire
- **Absences** page: AM Administrators can adjust employee absence balances manually using this page or through the **TA792 Leave Balance Adjustment Mass Upload Template**.

Balance adjustments entered directly into Cardinal on the **Absences** page, Supporting Elements page, or through a mass upload can be viewed on the Comprehensive Absence Summary page by the employee or on the Results by Calendar/Calendar Group pages by an AM Administrator the day after the adjustment has been made and has been processed by the Absence Calculation process. However, once the balance adjustment is entered, the balance is available to the employee for absence entry.

JOB AID REFERENCE

TA374 Managing Absence Balances

Managing Comp and OT Leave Balances

There are specific TRCs that are only available for TL/AM Administrators and are entered on the Timesheet to manage comp and OT leave balances. These are displayed in the TRC dropdown for TL and AM Administrators.

Admin only TRCs:

- CCA - Comp Time Leave Adjust
- CCD - Comp Time Leave Deduction
- CPO - Comp Time Leave Payout
- OCA - Overtime Leave Adjust
- OCD - Overtime Leave Deduction
- OPO - Overtime Leave Payout



JOB AID REFERENCE

TA374 Managing Absence Balances

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.

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.



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

JOB AID REFERENCE

TA374 Managing Absence Balances

Managing Leave Donation

Employees donating leave and employees requesting leave donation follow DHRM and agency policy and procedures with the agency HR Administrator.

After receiving the required documentation from the HR Administrators, the AM Administrators:

- Enter and manage DLR (Donated Leave) by entering balance adjustments for the recipient and donor.
- The donor's vacation balance will be reduced by the donated amount and the recipient's DLR balance will be increased by the donated amount.
- Donor and recipient balances update when the Absence Calculation process runs (runs each night). Their updated balances can be viewed through ESS on the Comprehensive Absence Summary page.
- The recipient can use the DLR hours after the balance adjustment has been keyed
- AM Admins can review reports or online pages to verify adjustments and balances are accurate.

Multiple adjustment rows for the same absence type cannot be added for the same Calendar ID period. If multiple employees are donating leave to the same recipient, add one adjustment row (DLR REC ELEM) with the total number of donated hours for the calendar period.

JOB AID REFERENCE

TA374 Managing Absence Balances

Lesson Summary

2 Managing Absence Balances

In this lesson, you learned:

- An Overview of Absence Entitlements and Accrual
- An Overview of Manual Adjustment of Entitlement Balances
- How to Enter a New Absence Entitlement
- How to Process Leave Donations and Recognition Leave

Lesson

3 Managing Absence Events and Leave

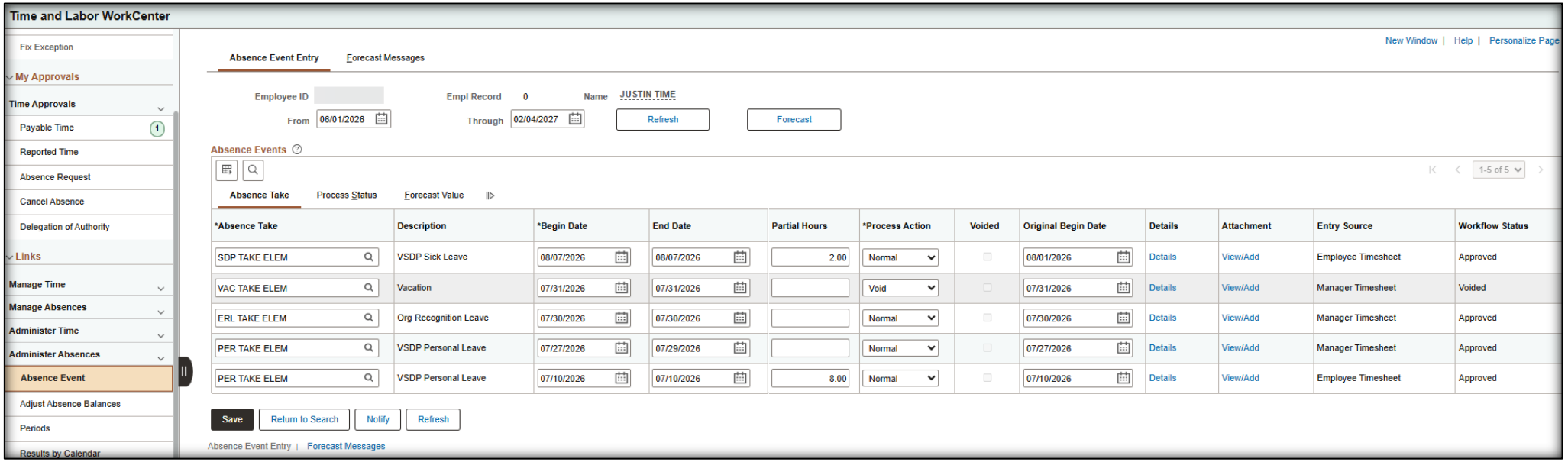
This lesson covers:

- Entering and Modifying Absence Events
- Managing Leave

Absence Event Page Overview

The **Absence Event** page provides a consolidated view of all absence events for the employee within a selected date range and includes the absence take code, description, dates, duration, approval, and processing status.

Absence Management Administrators can enter, modify, approve, delete, or void an absence event on behalf of an employee for various reasons, whether absences were keyed online or interfaced for dates one year from the current open calendar.

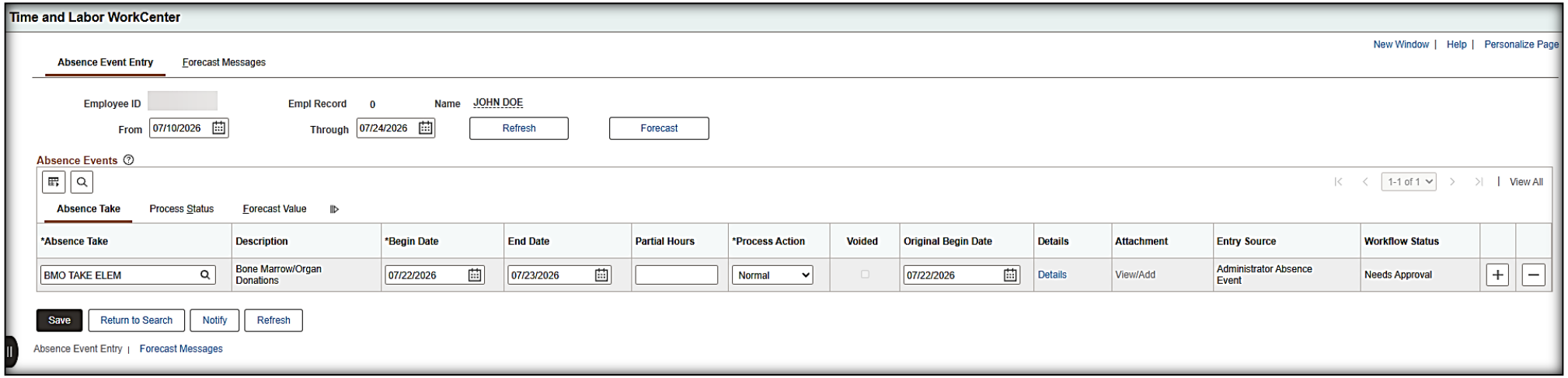


Compensatory and Overtime leave are entered and modified on the Timesheet page. All other absences can be managed on the Absence Events page.

Interfacing Agencies are recommended to change/correct absence information in their source system so that it automatically uploads into Cardinal. This ensures that both systems are in sync and avoids the need to make adjustments in two systems.

Entering and Approving an Absence Event

- Absences entered, modified, or approved on the **Absence Event** page cannot be edited on the employee timesheet
- Absences entered or modified on the Absence Event page do not route to the Reports to Supervisor for approval and must be approved by an AM Administrator on the Absence Event page.
- Absence Management Administrators are responsible for reviewing absence data but are only required to key the 10 Admin only absence types
- Cardinal recommends having a second AM Administrator review and approve all extended leave absence events.
- Always check the Forecast Value after forecasting to make sure the employee is eligible



Modifying an Absence Event

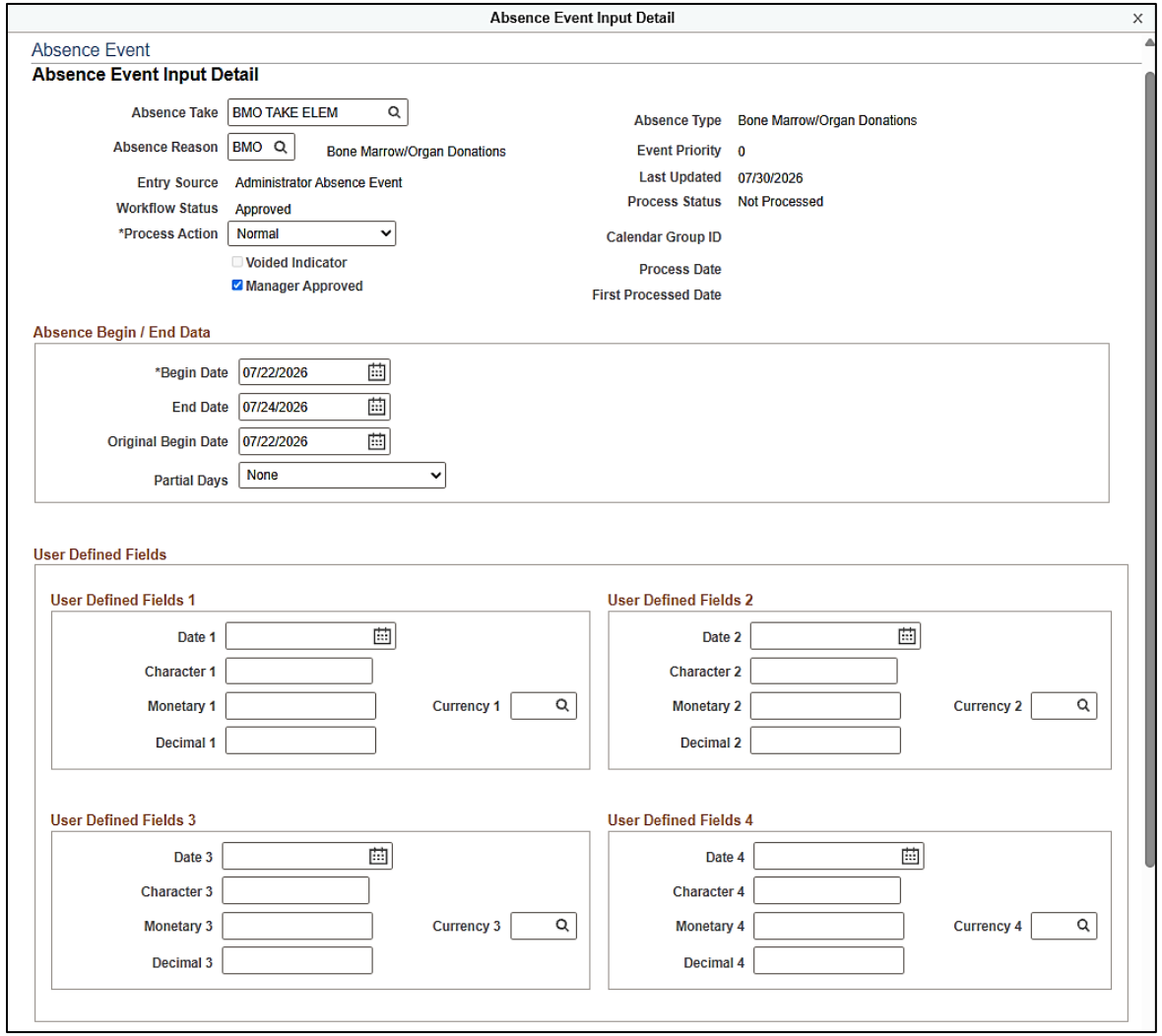
Locate the employee's absence event and select the **Details** link. From the **Absence Event Input Detail** page, make the necessary updates.

Update the required information, such as:

- Begin Date or End Date
- Partial Days/Partial Hours
- Absence Reason

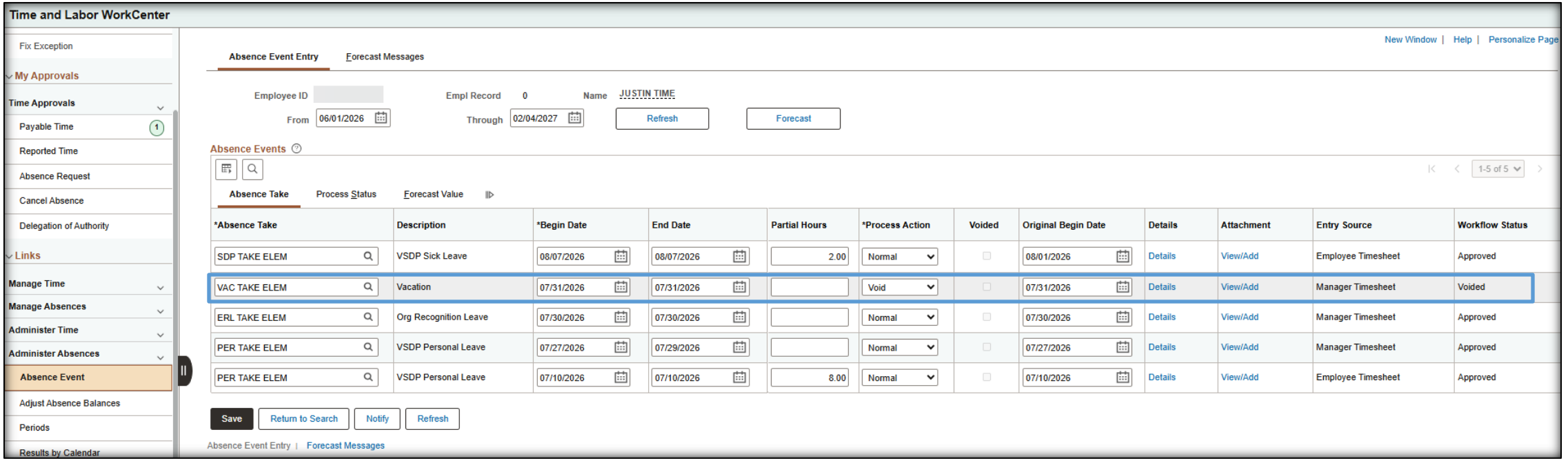
Always document the reason for the modification in the **Comments** section and verify forecast eligibility before saving changes.

Forecasting recalculates eligibility and balances based on the revised absence information. Review the Forecast Details to confirm the employee remains eligible and to verify any impact on paid or unpaid leave hours.



Voiding an Absence Event

Absence Events can be voided when appropriate.



JOB AID REFERENCE

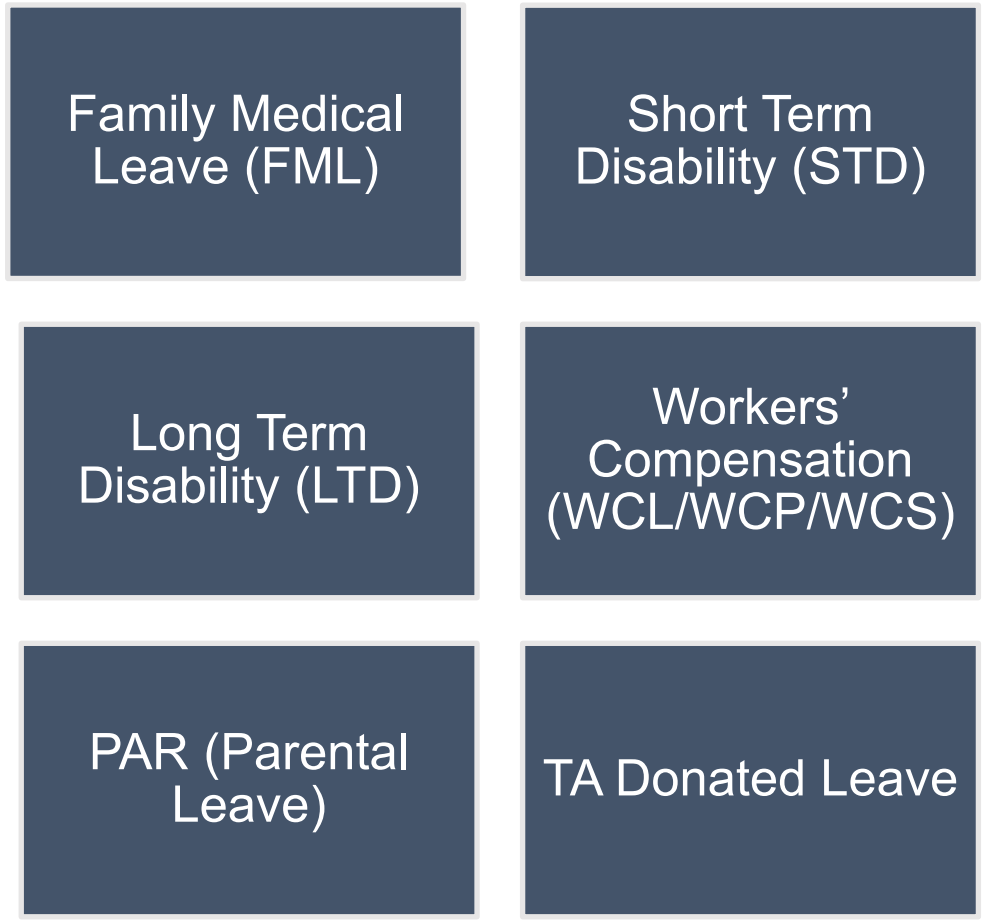
TA374 Entering and Modifying Absences

Processing Paid Leaves of Absence

The AM Administrator is responsible for ensuring that extended absences are reported and tracked for employees enrolled in Cardinal Absence Management.

Responsibilities include:

- Ensuring Work Schedule and Holiday Schedule has been updated if needed (work with HR/TL Administrators)
- Entering/approving extended leave absence events
- Entering/approving supplemental and concurrent leave during periods of leave of absence
- Entering absence balance adjustments as needed to support extended leave and return from leave
- Reviewing absence accumulator results to ensure balances are accurate
- Reviewing payee messages to check for extended leave accumulator limit warnings
- Ensuring timesheets are completed with productive hours if employee is working while in a Paid Leave status



Managing Extended Leave

Paid Leave	Unpaid Leave	Return From Leave
Short Term Disability (STD) Long Term Disability(LTD) Worker's Compensation Leave	Employee will not be paid	Employee physically returns from Leave
HR Administrator: • Selects applicable **Action** and **Reason** codes • Changes the Holiday Schedule from "HOLSAL" to "HOLSTD"	**HR Administrator**: • Selects the **Action** of "Unpaid Leave" and applicable **Reason** code	**HR Administrator**: • Selects the **Action** of "Return From Leave" • Turns on automatic semi-monthly payments (Paid Leave only) • Removes STD claim # if applicable • Changes Holiday Schedule back to "HOLSAL" (Paid Leave only)
TA/AM Administrator • Determines Supplemental Leave if requested and notifies Payroll • Updates Employee's Work Schedule • Enter/approve disability absence events	**TA/AM Administrator:** • Determines if additional actions need to be taken based upon type of Leave • Enter/approve disability absence events	**TA/AM Administrator:** • Updates Employee's Work Schedule
Payroll Administrator: Manually processes payments	**Payroll Administrator**: Manually processes payments if applicable	**Payroll Administrator**: Manually processes payments if applicable

Entering and Approving Paid Leave of Absences

- Extended leave absence events do not automatically display as “Approved” and do not route for approval via workflow or generate a worklist item

- Cardinal recommends a second Absence Management Administrator approves the absence

  - The Absence Management Administrator that enters the event will need to notify the second Absence Management Administrator at your Agency to approve the request
  - In cases where there is only one Absence Management Administrator within the Agency, the same Absence Management Administrator that enters the absence event is also able to approve it



Entering and Approving Paid Leave of Absences Family and Medical Leave

In order for the employee to take FML in Cardinal, the Absence Management Administrator must enter a balance adjustment to grant the employee hours.

FML is available for selection on the Timesheet but is typically only entered on the Timesheet if the leave is intermittent rather than consecutive. If the FML is to be entered by the employee/timekeeper/manager on the Timesheet, the Absence Management Administrator will still need to grant the appropriate FML hours as a balance adjustment.

The Family and Medical Leave (FML) absence type is used for tracking purposes only. It does not generate earnings. Additionally, it is not loaded to Payroll or used in allocation distribution.

JOB AID REFERENCES

- Processing Paid Leaves of Absence
- Processing Unpaid Leaves of Absence

Checking Absence Tracking Accumulators

Cardinal uses accumulators to track the hours or days of absence usage (accumulated time) based on pre-defined business rules.
The accumulators used for the various extended absence types include:

- **FML** (Family and Medical Leave): Three tracking accumulators are used to track FML hours used
  - The "**FML ENT ELEM TAKE**" accumulator tracks FML used in the leave year, regardless of absence reason (includes Employee, Family, and Military FML)
  - The "**FML EMP/FAM BAL**" accumulator tracks FML used in the leave year with an absence reason of "Employee" or "Family"
  - The "**FML MILITARY BAL**" accumulator tracks FML used in the leave year with an absence reason of "Military". Some military leave accumulators track based on the federal fiscal year (10/1 – 9/30)

- **STD** (Short Term Disability): The "**STD TAKE BAL DAYS**" accumulator tracks the total STD taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Short Term Disability period

- **LTD** (Long Term Disability): Similar to STD, the "**LTD TAKE BAL DAYS**" accumulator tracks the total LTD taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Long Term Disability period

- **WCL/WCP** (VSDP Workers' Compensation Pay/Workers' Compensation): The "**WCL TAKE BAL DAYS**" accumulator tracks the total WCL or WCP taken in the leave year in days rather than hours. It also includes holidays and weekends that fall during a consecutive Workers' Compensation period

Pay Docking

Pay Docking (LNP) is the reduction of an employee's wages/salary when unpaid time has been taken off. It can be system generated, interfaced from an Agency source system, or entered directly by the employee, Timekeeper, Supervisor, or Time & Labor /Absence Management Administrator. While Pay Docking is entered in Time & Attendance, it does not load to the employee's paysheet.

Payroll Administrators are responsible for calculating and then manually entering Pay Docking transactions into SPOT to reduce the employee's wages/salary when applicable.

It is important for Payroll Administrators, AM Administrators, TL Administrators, Supervisors, and employees to work together when reviewing any potential Pay Docking scenarios to avoid unexpected Pay Docking.

There are two key reports that should be run to help determine when pay should be docked.

- **Ineligible Forecasted Absence Query:** list of all employees that may go into a pay docking situation
  Note: This query is only applicable for Agencies using Cardinal Absence Management

- **Docking Unpaid Absences Report:** list of all employees with LNP on the Timesheet

JOB AID REFERENCE

Pay Docking in Cardinal Overview



Example Scenario of Indirect Pay Docking

- An employee has 24 hours of personal leave.
- The employee requests to take 24 hours of Personal Leave for a trip two months from now and the employee enters the Absence Request. The forecast is successful, and the Absence Request is approved.
- Two weeks later, after making the initial request, the employee takes 16 hours of Personal Leave.
- The future Absence Request now becomes ineligible because the employee used 16 of their 24 hours.
- By re-checking the balances, there will only be 8 hours of Personal Leave available (making 16 hours of the Personal Leave for the future Absence Request insufficient).
- If no action is taken, the Timesheet will be processed with 8 hours as Personal Leave (the remaining available balance) eligible and 16 hours as LNP (Pay Docking).
- To avoid pay docking, re-check the absence eligibility, edit the future Absence Request and use a different absence type for 16 hours.

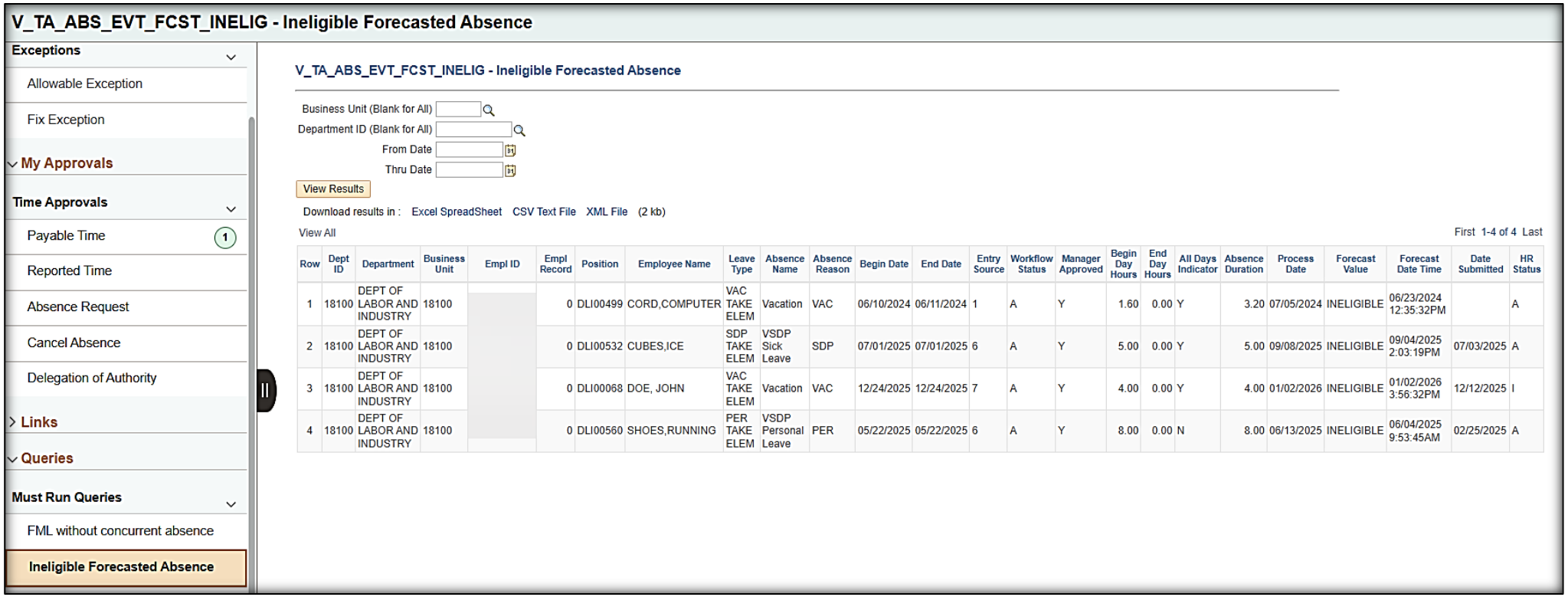


Ineligible Forecasted Absence Requests

The **Ineligible Forecasted Absence Query (V_TA_ABS_EVT_FCST_INELIG)** displays the absence name and reason, begin and end dates, entry source, workflow status, manager approval status, and hours by employee, Department, and Business Unit. This query can be used to search for individual employees who are forecasted to have Absence Requests that are not eligible and/or approved.

Navigate to this report using the following path:

TA WorkCenter > Queries > Must Run Queries > Ineligible Forecasted Absence



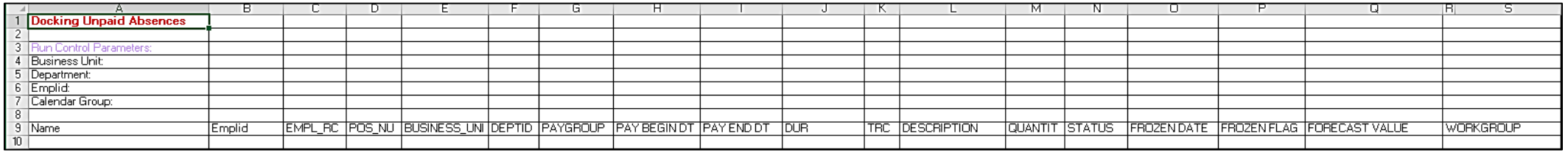
Row	Dept ID	Department	Business Unit	Empl ID	Empl Record	Position	Employee Name	Leave Type	Absence Name	Absence Reason	Begin Date	End Date	Entry Source	Workflow Status	Manager Approved	Begin Day Hours	End Day Hours	All Days Indicator	Absence Duration	Process Date	Forecast Value	Forecast Date Time	Date Submitted	HR Status
1	18100	DEPT OF LABOR AND INDUSTRY	18100		0	DLI00499	CORD,COMPUTER	VAC TAKE ELEM	Vacation	VAC	06/10/2024	06/11/2024	1	A	Y	1.60	0.00	Y	3.20	07/05/2024	INELIGIBLE	06/23/2024 12:35:32PM		A
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3	18100	DEPT OF LABOR AND INDUSTRY	18100		0	DLI00068	DOE, JOHN	VAC TAKE ELEM	Vacation	VAC	12/24/2025	12/24/2025	7	A	Y	4.00	0.00	Y	4.00	01/02/2026	INELIGIBLE	01/02/2026 3:56:32PM	12/12/2025	I
4	18100	DEPT OF LABOR AND INDUSTRY	18100		0	DLI00560	SHOES,RUNNING	PER TAKE ELEM	VSDP Personal Leave	PER	05/22/2025	05/22/2025	6	A	Y	8.00	0.00	N	8.00	06/13/2025	INELIGIBLE	06/04/2025 9:53:45AM	02/25/2025	A

Docking Unpaid Absences Report

The Docking Unpaid Absences Report displays a list of employees with processed unpaid absences and can be used to review transactions and identify hours that require Pay Docking for salaried employees in Cardinal. Unpaid absences can either be from Absence Management (for example, “LNP – Pay Docking”) or from Payable Time (for example, “HNP - Holiday Pay Docking”) where Cardinal is the leave system of record or from Payable Time (for example, **LNPX - Pay Docking** or **STLX - Short Term Disability-Pay Dock**) where the Agency has an external leave system of record.

Navigate to this report using the following path:

TA WorkCenter > Reports/Processes > Must Run Reports > Docking Unpaid Absences Report



	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	Docking Unpaid Absences																		
2																			
3	Run Control Parameters:																		
4	Business Unit:																		
5	Department:																		
6	Emplid:																		
7	Calendar Group:																		
8																			
9	Name	Emplid	EMPL_RC	POS_NU	BUSINESS_UNI	DEPTID	PAYGROUP	PAY BEGIN DT	PAY END DT	DUR	TRC	DESCRIPTION	QUANTITY	STATUS	FROZEN DATE	FROZEN FLAG	FORECAST VALUE	WORKGROUP	
10																			

Before HR Data Freeze	Day after Payday
1. Run report with current Calendar Group ID/Period Begin and End dates 2. Save the report to use as a comparison after the Payday 3. Review for Pay Docking 4. Payroll Administrator verifies with the TL/AM Administrator 5. Enter SPOT transaction(s)	1. Run report again with the same Calendar Group ID/Period Begin and End dates 2. Save the report 3. Compare the results of the report run Before HR Data Freeze the report run after the Payday 4. Identify any additional pay docking or if any funds are owed to the employee 5. Payroll Administrator verifies with the TL/AM Administrator 6. Enter SPOT transaction(s)

Lesson Summary

3 Managing Absence Events and Leave

In this lesson, you learned:

- Entering and Modifying Absence Events
- Managing Leave

Lesson

4 Reviewing Leave and Absence Balances

This lesson covers:

- Reviewing Employee Absence Balances
- Reviewing Employee Leave Balances
- Reviewing Employee Absence Requests

Reviewing Absence Balances

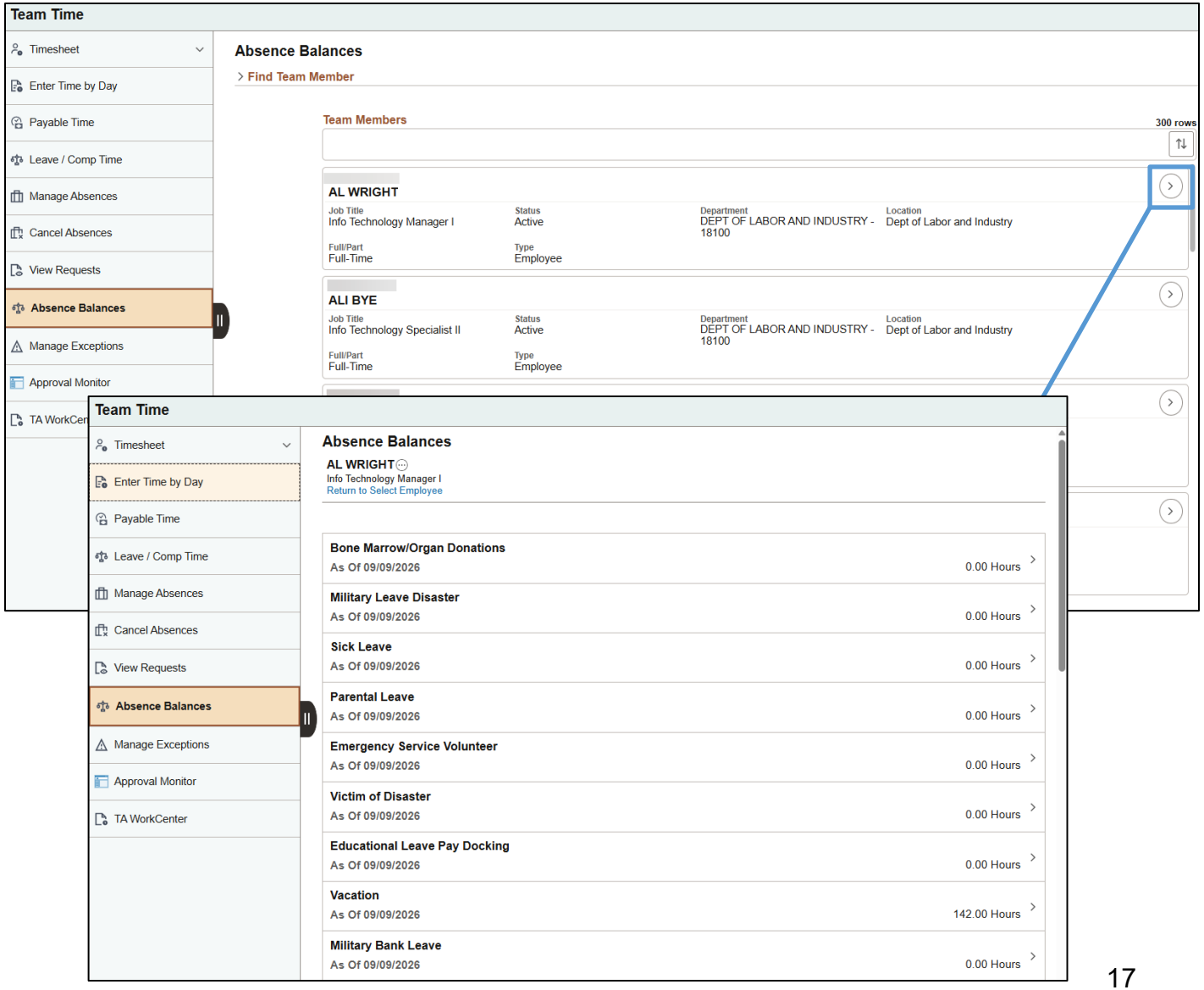
Absence Management (AM) Administrators may need to review an employee's current absence/leave balance to determine if any additional actions are required. Leave balances are available to view whether your Agency enters transactions directly in Cardinal or uploads through the interface.

Absence balances can be viewed on the following pages:

- **Timesheet** page (**Absence** tab)
- **Absence Balances** page (from **Team Time** and **TA WorkCenter** tiles)
- **Results by Calendar/Calendar group** pages

Cardinal is configured to align with Commonwealth policy on leave and absence types and, if applicable, their forfeiture or expiration.

Absence Management (AM) Administrators may need to make manual adjustments to absence/leave balances to resolve issues.



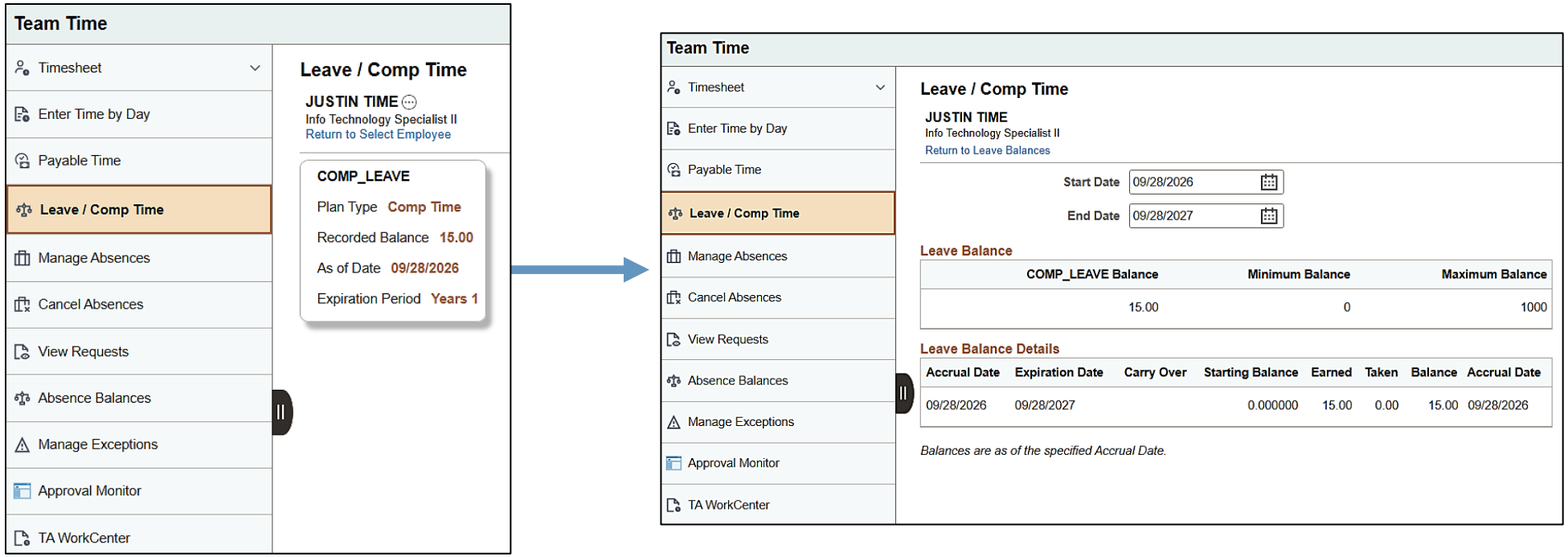
Reviewing Comp and OT Leave Balances

Employees eligible for Compensatory or Overtime Leave that have established a balance will have the **Leave / Compensatory Time** tab available on their Timesheet.

Absence Management (AM) Administrators can view employees Comp and OT Leave Balances and make manual adjustments when applicable.

Compensatory and Overtime Leave can be viewed on the following pages:

- **Timesheet** page (**Leave/Compensatory Time** tab)
- **Leave / Comp Time** page on the Navigation panel from the **Team Time** tile
- In the **TA WorkCenter** tile under **Links**, **Manage Absences** Section, **Leave and Compensatory Time** Page

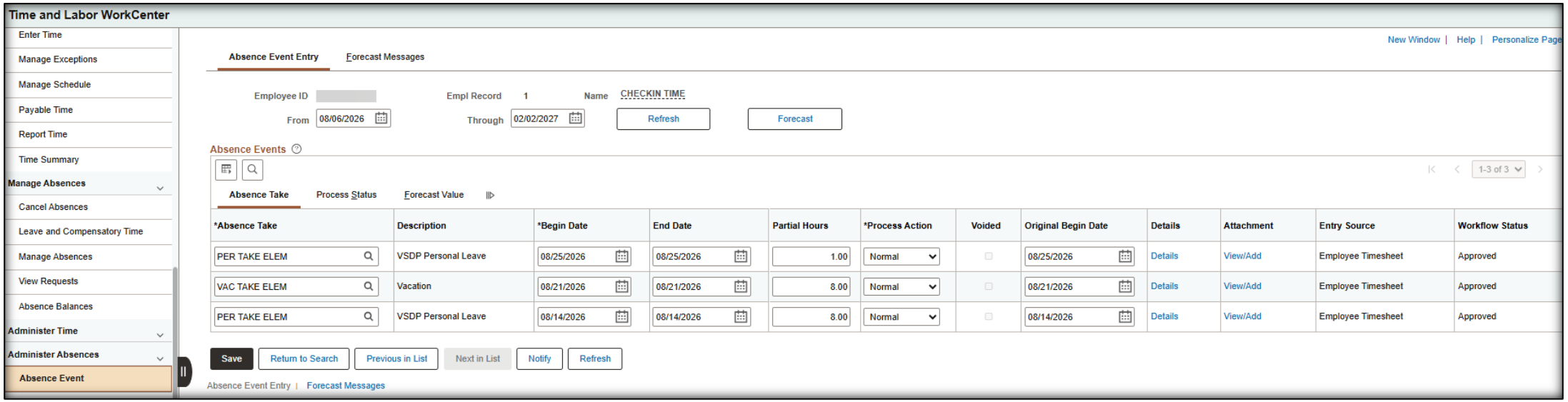


Reviewing Absence Events

Absence Administrators may need to review an employee's absence events to determine if additional actions are required.

On the **Absence Event** page, under the **Absence Events** section, the following details can be reviewed:

- Type of absence taken
- Dates of the absence
- Hours used
- Approval status
- Forecast value



Results by Calendar/Calendar Group

- The **Results by Calendar/Calendar Group** pages can assist Absence Management Administrators review detailed absence information processed by the Absence Calculation process and help to troubleshoot issues. For example, if balance adjustments or retroactive transactions were made for an employee, you can access previous calendars and recalculated versions of the calendars to ensure they were processed correctly. Both options show the same information, but it displays in different ways.

- The **Results by Calendar** page displays absence data based on the semi-monthly leave period it was effective in. The calendar selected will display the most recent version of the data effective in that calendar period along with any other versions of the same calendar period that may have been re-processed during a different calendar period due to retroactivity.

- The **Results by Calendar Group** page displays absence data based on the semi-monthly leave period it was processed in. The calendar group selected will display the corresponding calendar period along with any prior calendars that were re-processed during that period due to retroactivity.

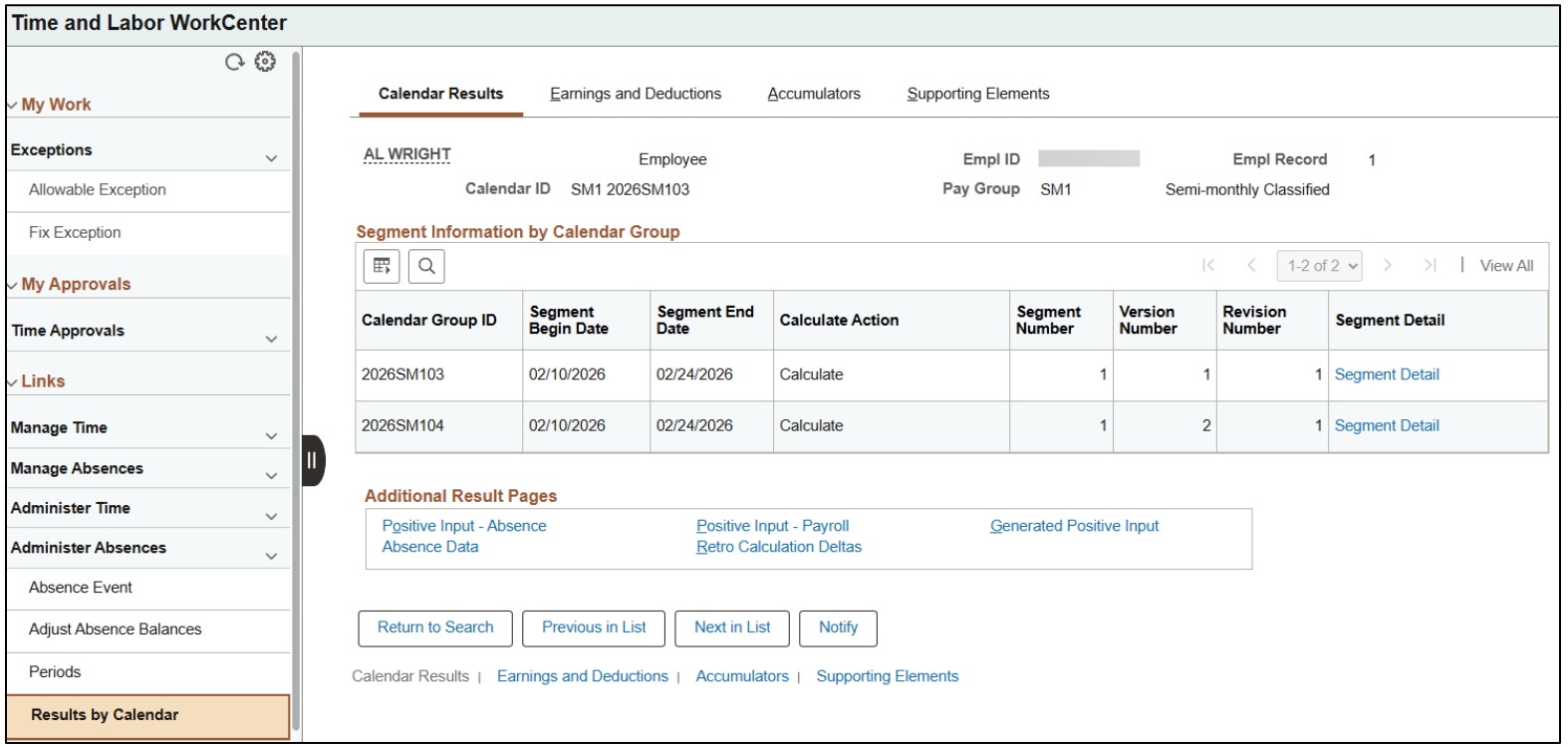


Results by Calendar

The **Results by Calendar** page displays absence data based on the semi-monthly leave period in which it was effective. The calendar selected displays the most recent version of the data effective in that calendar period along with any other versions of that same calendar period that may have been reprocessed during a different calendar period due to retroactivity. An example of result of by calendar with no retroactive adjustments.

Navigate to this page using the following path:

TA WorkCenter > Links > Administer Absences > Results by Calendar

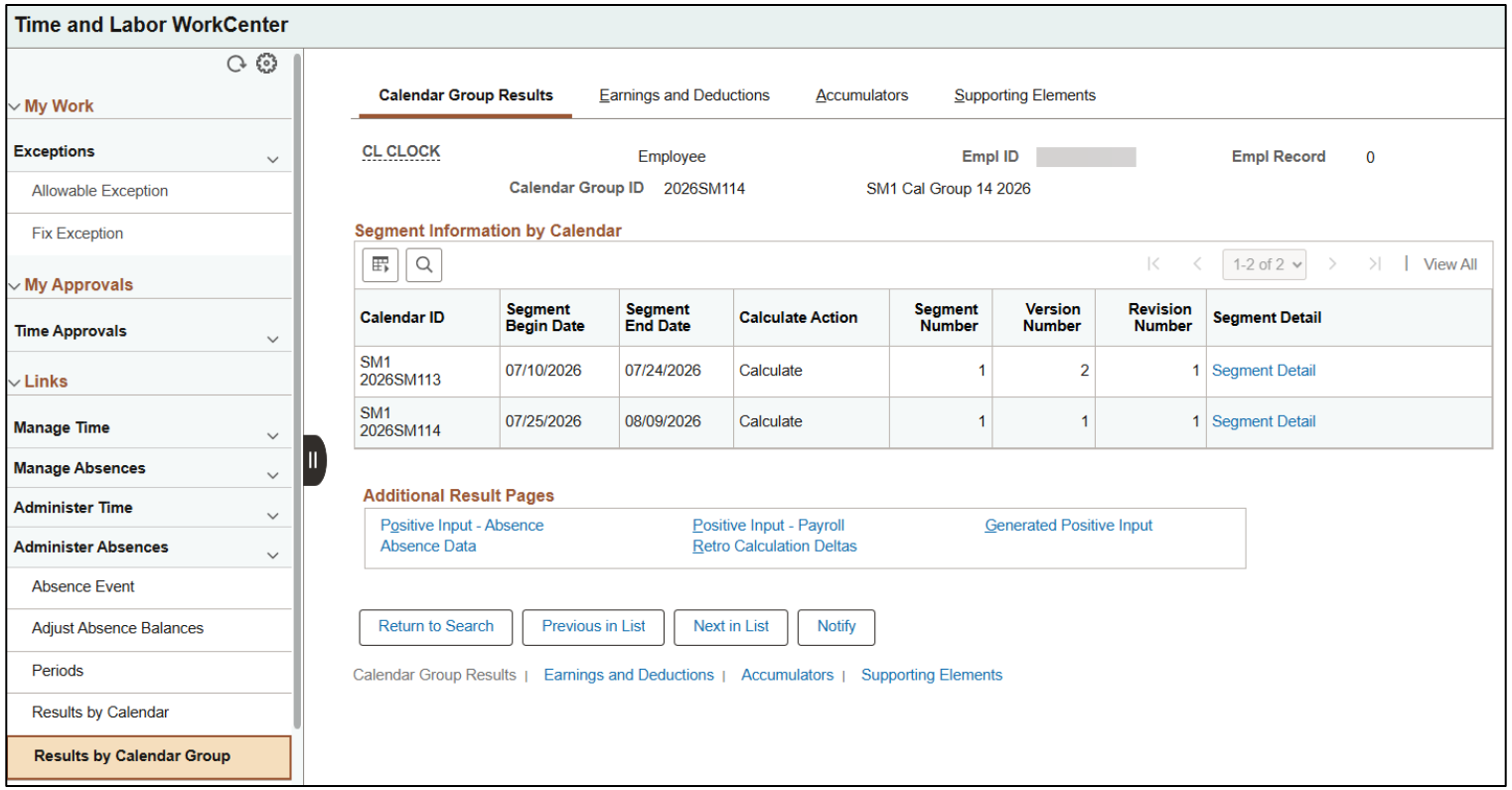


Results by Calendar Group

Results by Calendar Group shows the most recent Absence Calculation process run and any Calendar IDs with retroactive changes that were processed in the Calendar Group ID.

Navigate to this using the following path:

TA WorkCenter > Links > Administer Absences > Results by Calendar



Lesson Summary

4 Reviewing Leave Balances and Absences

In this lesson, you learned:

- How to Review Employee Absence Balances
- How to Review Employee Leave Balances
- How to Review Employee Absence Requests

Lesson

5 Managing Leave and Absence Balances for Termed Employees

This lesson covers:

- How to Zero Out Leave Balances
- Managing Leave Balances for Terminated Employees

Managing Employee Leave Payouts

Finalize all Leave Entries

- Confirm all leave has been entered, submitted, and approved.
- Collaborate as needed with the employee, supervisor, and TL/AM administrator.

Confirm SPOT Payouts

- Confirm with the Payroll Administrator any applicable leave has been paid via SPOT.

Zero Out Leave Balances

- Leave Balance Zero-Out Page
- Manual Adjustment via:
  - Absence Adjustment page (absence types)
  - Timesheet (Comp and Overtime leave)

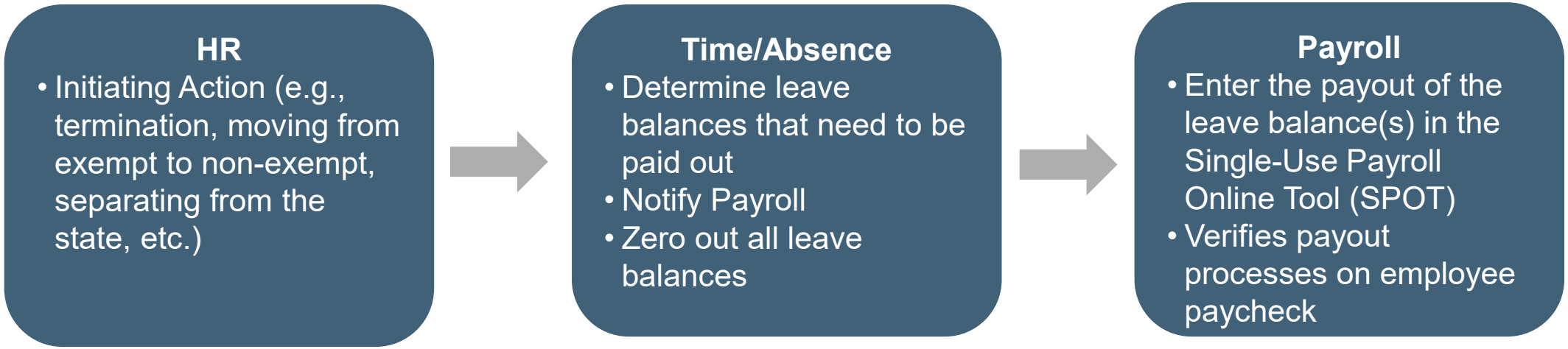
Identifying Balances for Leave Payout

Sometimes, an employee is no longer eligible for leave and may be eligible for a payout of some or all leave balances. When this occurs, there must be coordination between multiple Cardinal functional areas for the leave to be paid out accurately.

Examples of scenarios that may result in leave payout:

- Separating from the state
- Retiring
- Moving from a Salaried Position to an Hourly Position
- Moving from Non-Exempt to Exempt

The flow below provides a high-level overview of the process:



Follow Commonwealth and Agency policy regarding when leave is eligible for payout and how to calculate the amount to be paid.

Zeroing Leave Balances

When an employee is no longer eligible, the balances in Cardinal should be zeroed out whether they were eligible for payout or not. All leave, including compensatory and overtime, needs to be zeroed out.

If balances are not zeroed out, and the employee is rehired by the Agency, those balances will remain in Cardinal and may be eligible for the employee to use. Balances not zeroed out will be listed on the annual **DOA Leave Liability** report.

Examples of scenarios that may require leave to be zeroed out:

- Moved from non-exempt to exempt
- Leaves the state
- Transfers to another Agency

All leave types, except for compensatory and overtime leave, are zeroed out on the **Absences** page. Compensatory and overtime leave balances are zeroed out on the employee's Timesheet using the appropriate payout TRC.

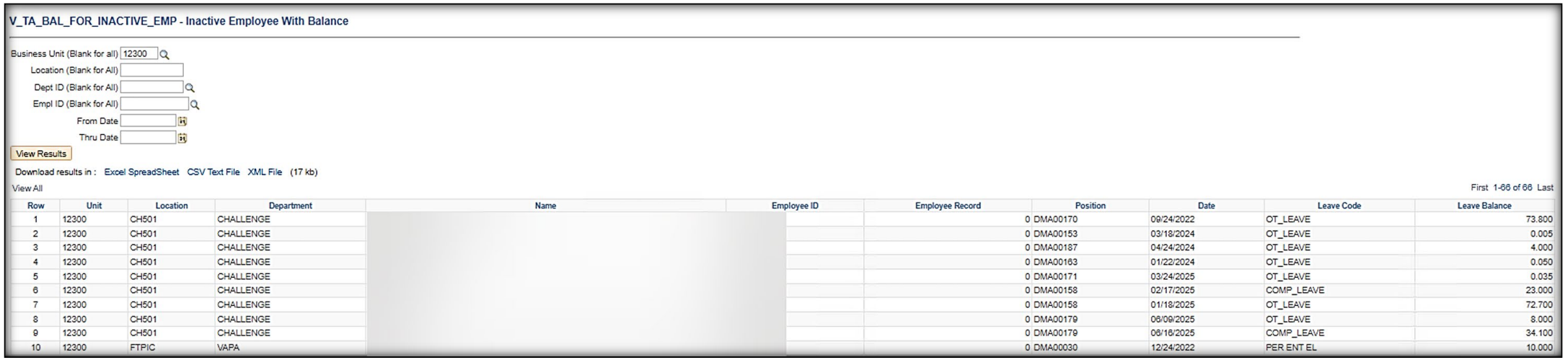
JOB AID REFERENCE

TA374 Managing Absence Balances

Identify Terminated Employees with Balances

- Use the Inactive **Employee with Balance** query (V_TA_BAL_FOR_INACTIVE_EMP) to identify inactive or terminated employees with leave balances.

- Identify specific leave types and balances that require adjustment or payout.



V_TA_BAL_FOR_INACTIVE_EMP - Inactive Employee With Balance

Business Unit (Blank for all) 12300
Location (Blank for All)
Dept ID (Blank for All)
Empl ID (Blank for All)
From Date
Thru Date
View Results

Download results in : Excel SpreadSheet CSV Text File XML File (17 kb)

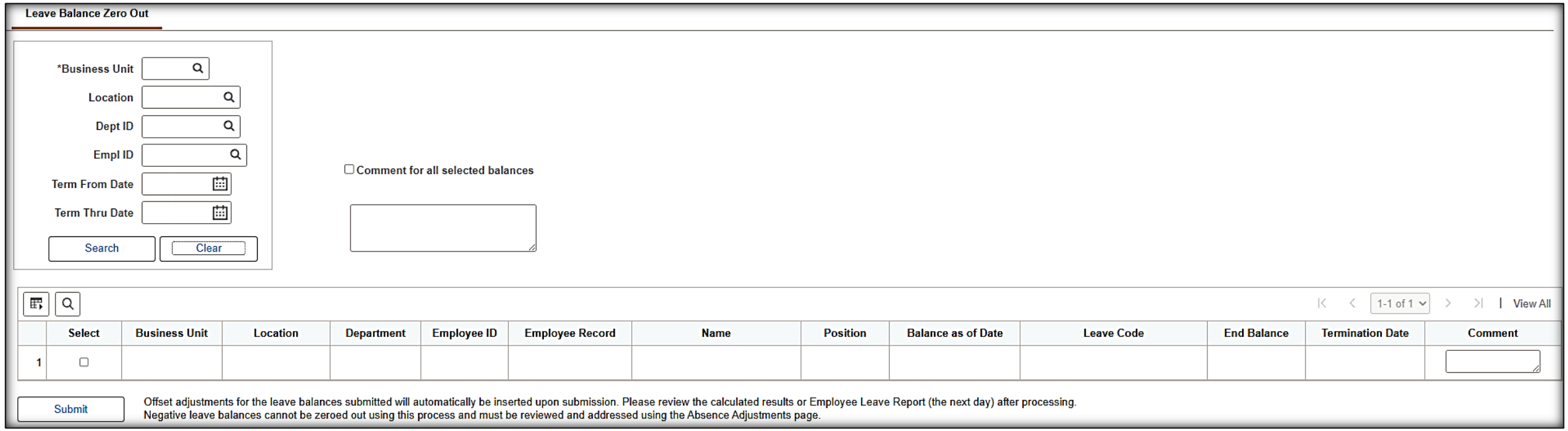
View All First 1-66 of 66 Last

Row	Unit	Location	Department	Name	Employee ID	Employee Record	Position	Date	Leave Code	Leave Balance
1	12300	CH501	CHALLENGE			0	DMA00170	09/24/2022	OT_LEAVE	73.800
2	12300	CH501	CHALLENGE			0	DMA00153	03/18/2024	OT_LEAVE	0.005
3	12300	CH501	CHALLENGE			0	DMA00187	04/24/2024	OT_LEAVE	4.000
4	12300	CH501	CHALLENGE			0	DMA00163	01/22/2024	OT_LEAVE	0.050
5	12300	CH501	CHALLENGE			0	DMA00171	03/24/2025	OT_LEAVE	0.035
6	12300	CH501	CHALLENGE			0	DMA00158	02/17/2025	COMP_LEAVE	23.000
7	12300	CH501	CHALLENGE			0	DMA00158	01/18/2025	OT_LEAVE	72.700
8	12300	CH501	CHALLENGE			0	DMA00179	06/09/2025	OT_LEAVE	8.000
9	12300	CH501	CHALLENGE			0	DMA00179	06/16/2025	COMP_LEAVE	34.100
10	12300	FTPIC	VAPA			0	DMA00030	12/24/2022	PER ENT EL	10.000

Leave Balance Zero-Out Page

- A single page to **search for terminated employees** with remaining balances.
- Ability to **select one or multiple balances** to zero out, with built-in logic to prevent negative balances.
- **Automatically generates offset adjustments** for both Absence Management and Time & Labor upon submission.

Balances older than one year cannot be zeroed out and will not display on the **Leave Balance Zero-Out** page.



Important Reminders using the Leave Balance Zero-Out Page

- Verify that all balances are correct and that all hours eligible for payout have been processed by SPOT.
- If a balance adjustment already exists, the row will be highlighted in red.
  - Review these balances on the **Timesheet** or **Absences** page as needed.
- Negative balances must be resolved using the **Absences** page.

After the Time Administration Process and Absence Calculation Process have run:

- Run the **V_TA_BAL_FOR_INACTIVE_EMP** query
- Revisit the **Leave Balance Zero-Out** page
- Run the **Employee Leave** report for the current open period

Automated Processes:

- **Time Administration**: Runs every two hours and processes Comp Leave and Overtime Leave payouts.
- **Absence Calculation**: Runs nightly to update all employee absence balances.

Leave Balance Zero-Out – Manually

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

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.

Absence Balances can be zeroed out manually on the **Adjust Absence Balances** page. Apply these additional guidelines on the **Adjust Absence Balances** page:

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)

JOB AID REFERENCE

TA374 Managing Absence Balances

Lesson Summary

5 Managing Leave and Absence Balances for Termed Employees

In this lesson, you learned:

- How to Zero Out Leave Balances
- How to Manage Leave Balances for Terminated Employees

Lesson

6 Absence Calculation Processing

This lesson covers:

- An Overview of Absence Calculation processing
- Troubleshooting Issues Related to Absences/Leave

Overview of the Absence Calculation Process

Calculate Absence is a daily batch process that calculates all absence entitlements (automatic and granted) and absence takes.

The Calculate Absence process includes:

- **Absence Entitlements**: This process updates frequency-based entitlements and makes entitlements available to the respective employees

- **Absence Takes**: During this process, Cardinal calculates the number of hours per day for each take and deducts the hours taken from the respective employee's balances

- **Retroactive Changes**: This process updates all intervening time periods up to the present period when you add, update, or delete an absence event or make changes to job data or a work schedule that affects a period that has already been processed

Absence Calculation Process

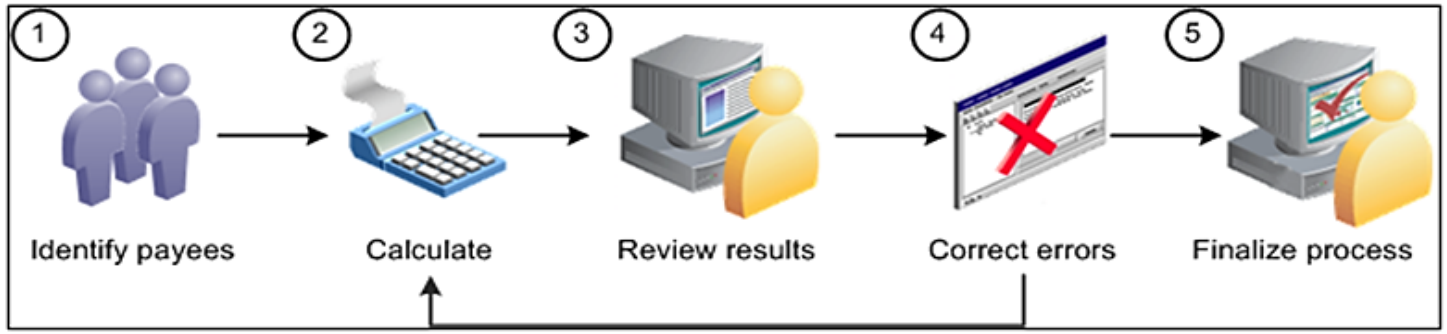
The Absence Calculation process:

- Selects employees to be processed –includes active employees and employees with pending retroactive changes
- Processes approved absence requests – identifies and processes approved absence requests
- Updates leave balances
- Updates the year-to-date (YTD) accumulators
- Calculates periodic accruals based on applicable leave policies and takes into account job attributes such as length of service and full/part-time status

Absence Calculation must be finalized before it can be sent to Time and Labor and payroll processing.

Once absence results have been finalized, any subsequent changes are retroactive transactions and are processed during the subsequent calendar periods.

After the absence calendar is finalized and closed, the next calendar will open for the current period.



Troubleshooting Issues Related to Absences/Leave

The following are three key resources that you can use to assist with researching and troubleshooting employee absences:

- Employee Leave Report
- Absence Accumulators Result Query
- Results by Calendar and Calendar Group

JOB AID REFERENCES

- TA374 Results by Calendar – Calendar Group
- Cardinal HCM Time and Attendance Reports Catalog

Lesson Summary

6 Absence Calculation Processing

In this lesson, you learned:

- About the Absence Calculation process
- How to troubleshoot Issues Related to Absences/Leave

Key Concepts

- There are 10 Admin only Absence events that Absence Management Administrators are responsible to key in on the **Absence Event** page
- Adjustments can be made to absence takes and entitlements in a prior period
- Employees/Timekeepers and Supervisors/Managers can adjust absences up to 90 days in the past
- Absence Management Administrators can adjust absences up to 1 year from the current open period
- Absence balances can be viewed on the following pages:
    - Timesheet (**Absence** tab)
    - **Absence Balances** page (from **Team Time** and **TA WorkCenter** tiles)
    - **Results by Calendar/Calendar group** pages
    - **Comprehensive Absences Summary** page - for ESS users
- Absence balances displayed on the employee Timesheet and balance history pages are from prior closed pay periods and do not include accruals earned or hours taken after pay period end
- The Absence Calculation process processes approved absences and calculates entitlements and balances
- Absence Management Administrators are responsible for managing leave balances for terminated employees



Course Summary

TA374 Absence Management Administration

In this course, you learned:

- An overview of the Absence Management Administrator Role
- How to Enter and Modify Absence Events
- How to Manage Leave in Cardinal
- How to Review Absence and Leave Balances
- How to Manage Leave and Absence Balances for Termed Employees
- The Calculate Absence and Payroll Processing Processes

Appendix

- Roles and Responsibilities
- Flowcharts
- Flowchart Key

TA Roles and Responsibilities

Responsibilities / Roles	Employee TL Setup	Employee	Timekeeper	TL Admin	Absence Admin	TL and Absence Supervisor	TA Interface Admin
Enter/Modify own Timesheet (including Time and Leave/Absences)		✓					
Enter/Modify Timesheets on behalf of Employees (including Time and Leave/Absences)			✓	✓	✓	✓ (Direct Reports)	
Cancel Absences		✓	✓	✓	✓	✓ (Direct Reports)	
Review/Resolve Timesheet Exceptions (Warnings)		✓	✓	✓	✓	✓ (Direct Reports)	
Allow Timesheet Exceptions (Warnings)				✓	✓	✓ (Direct Reports)	
Review and Correct Time Entry Upload and Absence Entry Upload Transactions				✓	✓		✓ (on Upload Review Page)
Enter/Modify Time Reporter Data, Comp Plans, TL Eligibility, and TL Auto Enroll Bypass	✓			✓ View Only for Elig and TL Auto Enroll			

TA Roles and Responsibilities (continued)

Responsibilities \ Roles	Employee TL Setup	Employee	Timekeeper	TL Admin	Absence Admin	TL and Absence Supervisor	TA Interface Admin
Administer Absence Events and Review Absence Calculation Results					✓		
Enter/Modify Absence Balance Adjustments					✓		
Assign Employee Work Schedules	✓		View Only	✓	View Only	✓ (Direct Reports)	
Approve Time and Absences						✓ (Direct Reports)	
Run TA Reports/Queries	✓		✓	✓	✓	✓	✓

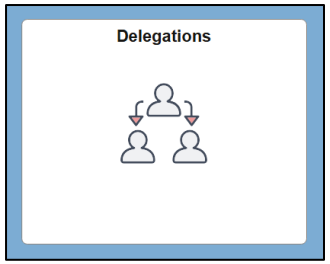
Delegation Administrator Role

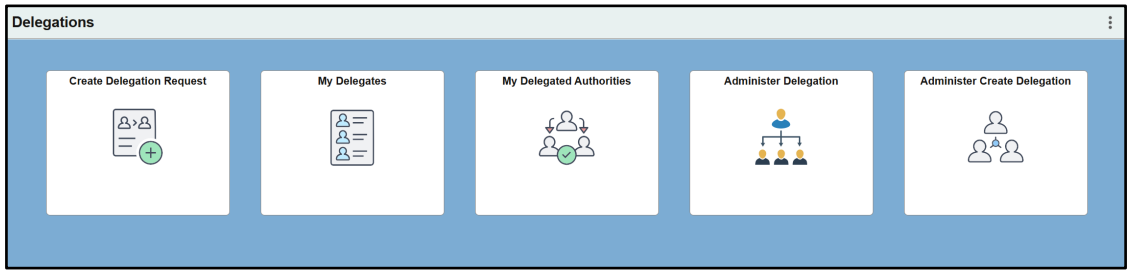
Delegation allows Reports To Supervisors to authorize another supervisor to serve as their delegate to manage and approve their direct reports' time and absences. When a Reports to Supervisor delegates to a delegate, all workflow notifications and approval transactions route to the delegate.

The Delegation Administrator Role provides access for an administrator to set up delegation on behalf of a Reports To Supervisor.

Users with this role have access to:

- Add and manage Time & Attendance delegation requests on behalf of Reports to Supervisors
- Create, modify, and revoke delegation requests on behalf of Reports to Supervisors
- Delegates and Delegators receive workflow email notifications when delegation requests are created or modified by the Delegation Administrator





TA Special Restricted Approver Role – Manage Time with Workflow Issues

- Timesheet transactions route to the TA Special Restricted Approver when there is an error in the reports to structure. These transactions display in the TA Special Restricted Approver's **Approvals** tile / **TA WorkCenter** > **Time Approvals**.
- All Cardinal PY Agencies are required to assign this role to at least one user. User(s) with this role will identify and manage time and absence transactions that do not route to a Reports To Supervisor.
- TA Restricted Special Approvers, TL Administrators, AM Administrators, HR Administrators, and TA Supervisors should collaborate to resolve reports to structure issues resulting in transactions routing to the TA Special Restricted Approver.



The TA Restricted Special Approver will only see items for approval on their **Approvals** tile / **TA WorkCenter** > **Time Approvals** in the rare scenarios when it is not routing to a TA/AM Supervisor. TA Restricted Special Approver does not have access to approve all time and absences, only those transactions that have routed to them due to a data issue preventing transactions to route to a Reports To Supervisor.

TA Expired Grace Approver Role

The TA Expired Grace Approver (V_TA_EXPIRED_GRACE_APPROVER) role allows select Agency users to manage time that falls outside of normal submission and approval grace periods. This role grants access to two pages in Cardinal; the **Update Time Status** page and the **Request Batch Approval Process** page. These pages allow users with this role to perform the following actions for any employee in the Agencies they have access to:

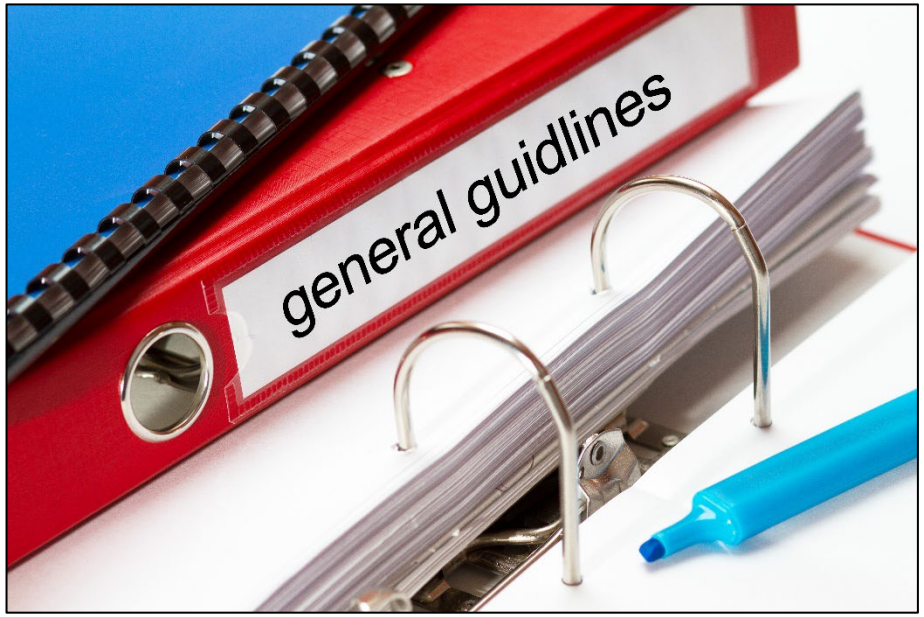
TA Expired Grace Approver Role Capabilities	
Employees in Online Workgroups	
Action	Role Permissions
Approve Payable Time in Needs Approval (NA) status outside of grace period	Between 90 and 365 days old
Close or Delete Reported Time in Saved (SV) or Needs Approval (NA) status	More than 90 days old
Close Payable Time in Needs Approval (NA) status	More than 90 days old
Delete Invalid Reported Time	After termination date
Employees in Interfacing Workgroups	
Action	Role Permissions
Close or Delete Reported Time in Saved (SV) or Needs Approval (NA) status	More than 90 days old
Delete Invalid Reported Time	After termination date

TA Expired Grace Approver Role Guidelines

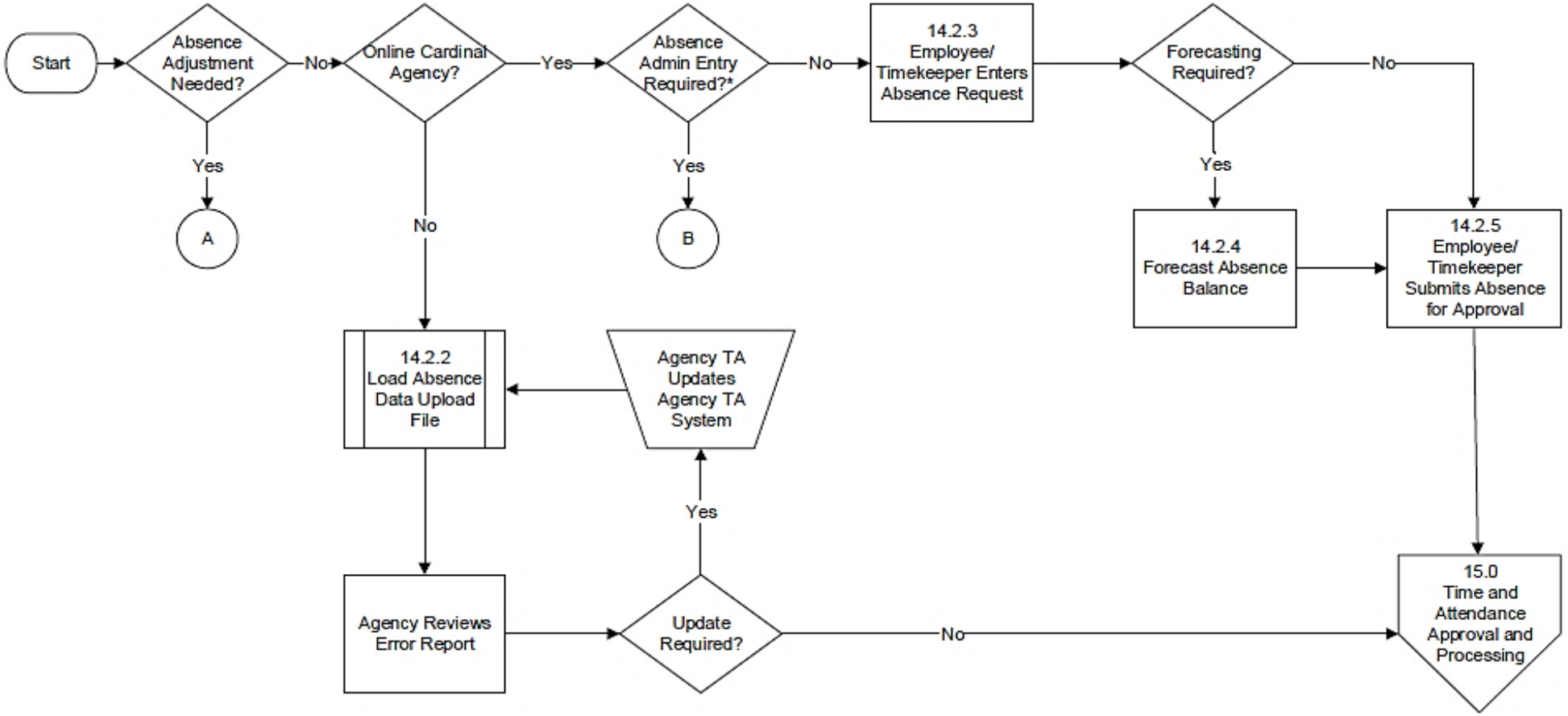
- Every Cardinal HCM payroll Agency must have at least one designated TA Expired Grace Approver.
- It is recommended that this role be assigned to a Fiscal Officer or designee who understands the impact on pay and the distribution of funds related to approving, closing, and deleting old time transactions
- This role may only be assigned to a maximum of three users at each Agency
- Agencies should develop a process for Supervisors and administrators to request approval, closure, and deletion of time older than 90 days with appropriate justification, authorization, and deletion of time after termination dates

JOB AID REFERENCE

TA Time Status Administration



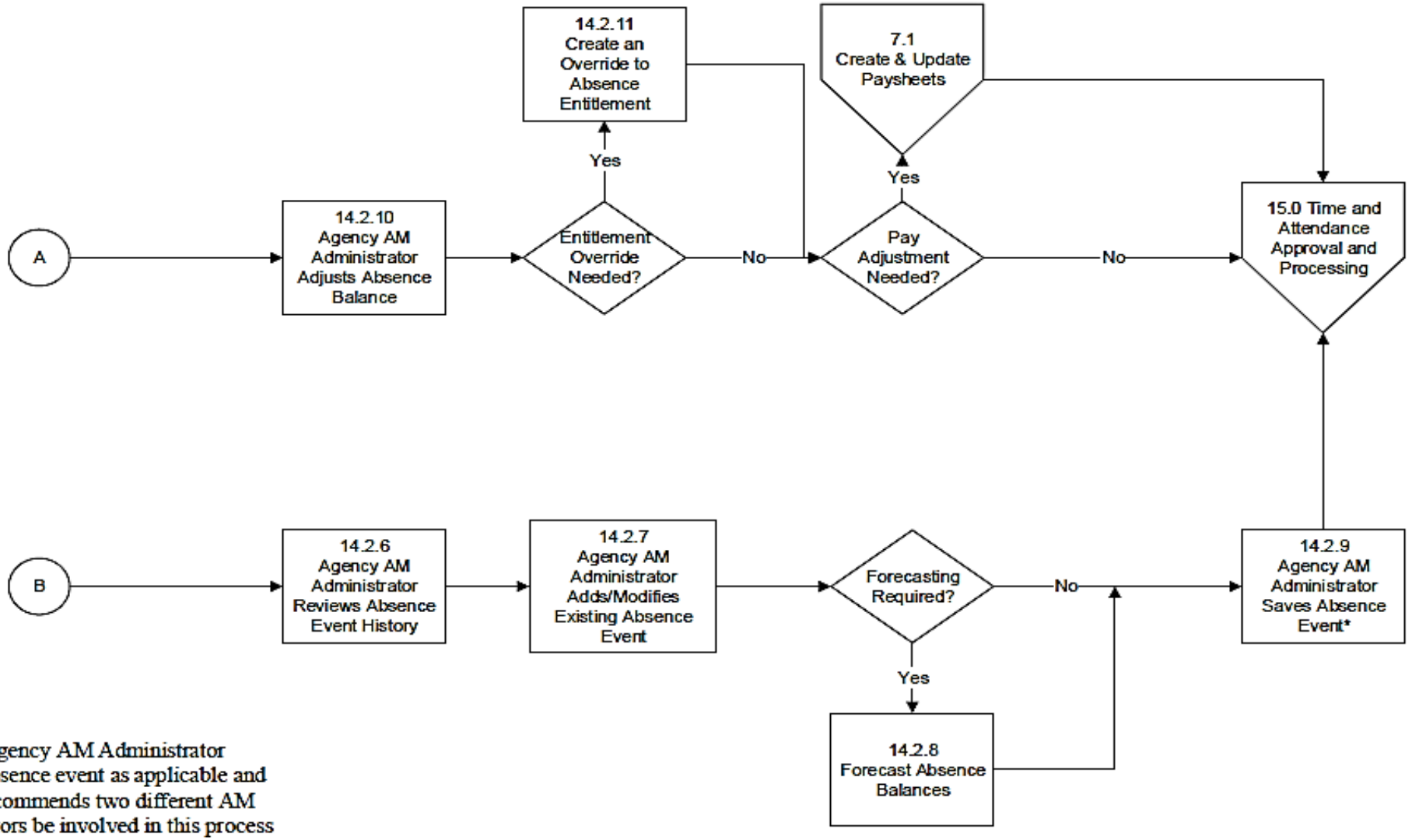
Process: TA Capture
Sub-process: Manage Absence Reporting



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

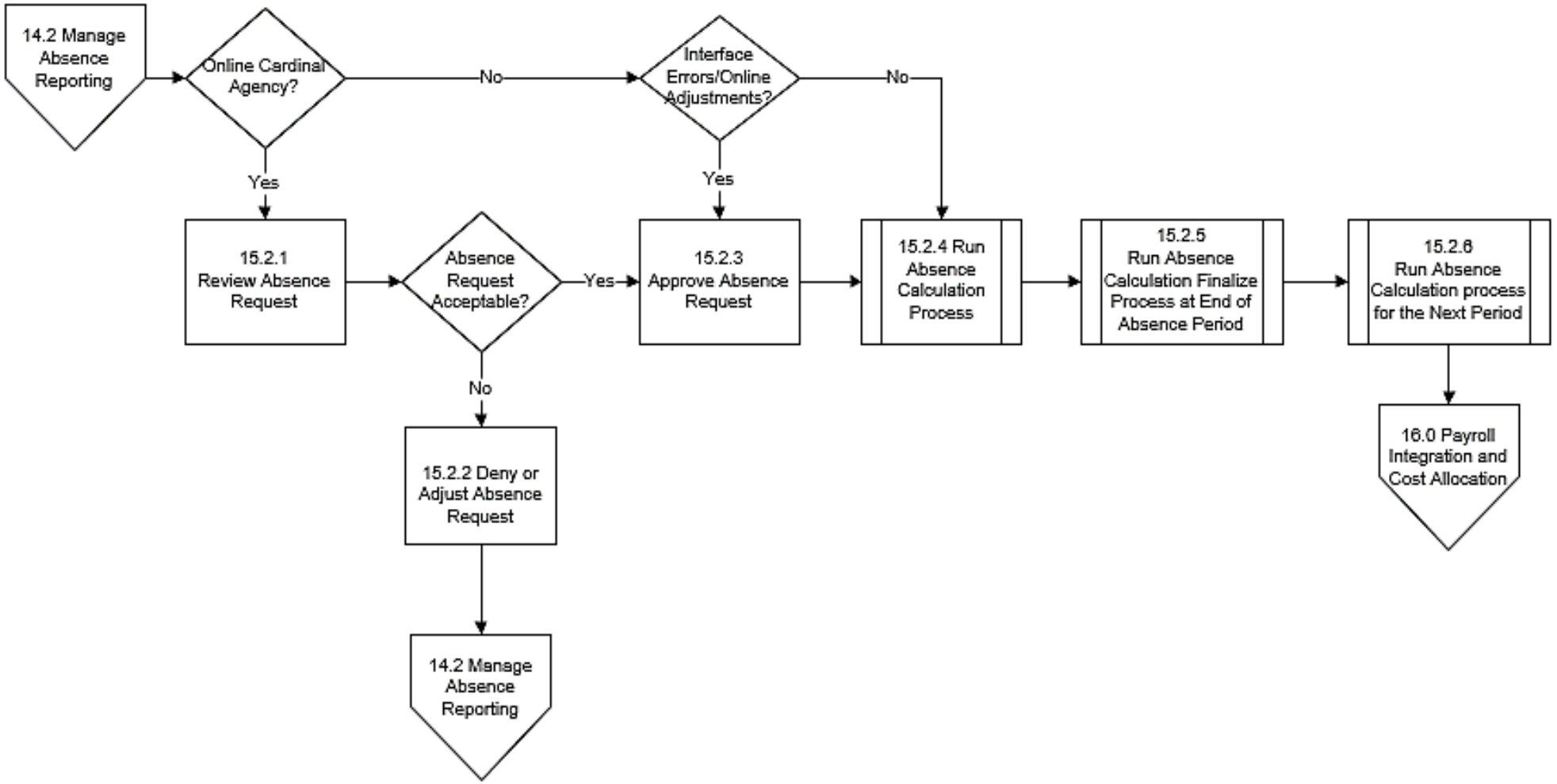
- Short Term Disability (STD)
- Long Term Disability (LTD)
- Workers' Compensation (WCP)

Process: TA Capture
Sub-process: Manage Absence Reporting (continued)



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

Administer Absence Processing



Flowchart Key

