HR351_Adding and Updating Rewards and Recognition

Rewards and Recognition Overview

Leave Reward:
There are two methods by which leave awards are entered:

1. Agencies using Cardinal as their leave system of record only need to enter leave awards as balance adjustments or entitlements into Cardinal Absence Management. For further information on entering Absence Entitlements, see the Job Aid titled **TA372 Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

2. Agencies not using Cardinal as their leave system of record additionally need to enter the leave award hours in the agency's external leave system of record to allow the employee to use the granted leave.

Cardinal does not automatically generate an interface to any external leave systems to grant the related leave award. The agency HR Administrator enters the award adjustment into the external agency leave system for the hours to be reflected in the employee's leave balance.

Consolidated reporting pulls leave awards from the **Cardinal Leave Award** page and **Cardinal Absence Management** to show statewide totals of leave awards. For further information on Reports, see the **HCM Human Resources Reports Catalog**. The HCM Human Resources Reports Catalog can be found on the Cardinal website under **Resources**.

Monetary Bonus:
All Monetary Bonus/Awards must be entered on the **Reward and Recognition** page regardless if your agency is using Cardinal Absence Management.

Agency HR Administrator tracks the employee's:
- written agreement
- expiration date of the written agreement per incentive bonus awarded
- payment installments (singular or multiple – as needed)

IMPORTANT! Entering information on the Rewards and Recognition page **does not create** any transaction for bonus payment. **HR or PY Admins** should coordinate and use the V_HR_REWARD_RECOGN_MASS_DATA query results to support SPOT transactions for processing bonuses or other earnings adjustments.

Mass Uploads:
<u>Agencies using Cardinal Absence Management</u>
- The **TA792_Leave Balance Adjustment Mass Template** should be used if there is a large volume of leave balance adjustments. The agency can submit an Excel file to be uploaded using the mass upload process.
- The **HR409_Reward and Recognition Mass Upload Template** should be used for monetary awards. For further information on Mass Uploads, see the Job Aid titled **Performing a Mass Upload**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

<u>Agencies not using Cardinal Absence Management</u>
- The **HR409_Reward and Recognition Mass Upload Template** should be used for both monetary and leave awards. For further information on Mass Uploads, see the Job Aid titled **Performing a Mass Upload**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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

Table of Contents

Adding a Reward and Recognition 3
Adding an Additional Award 6
Adding a New Payout to an Existing Reward 10
Modifying (Correcting) an Existing Reward and Recognition Award 13

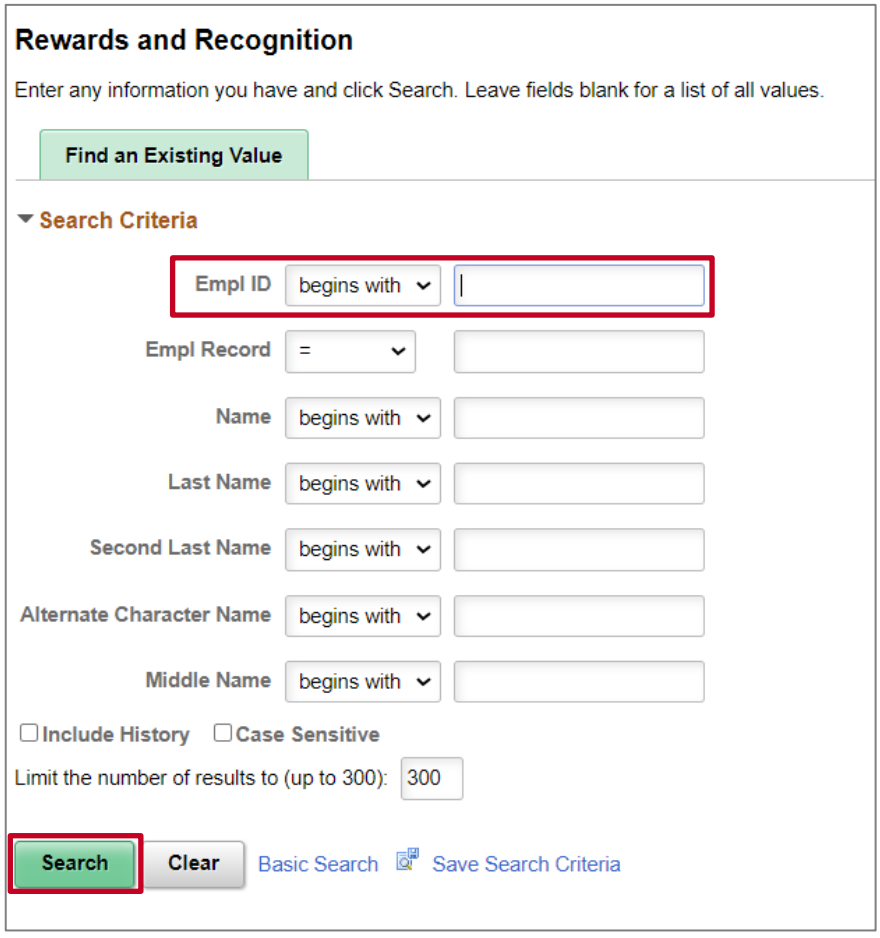
Adding a Reward and Recognition

Reminder: Agencies using the Cardinal Absence Management system do not record leave on the **Rewards and Recognition** page. Instead, it is entered in Cardinal Absence Management.

1. Navigate to the **Rewards and Recognition** page using the following path:

   Menu > Workforce Development > Rwd and Recogn Maintenance

The **Rewards and Recognition Search** page displays.

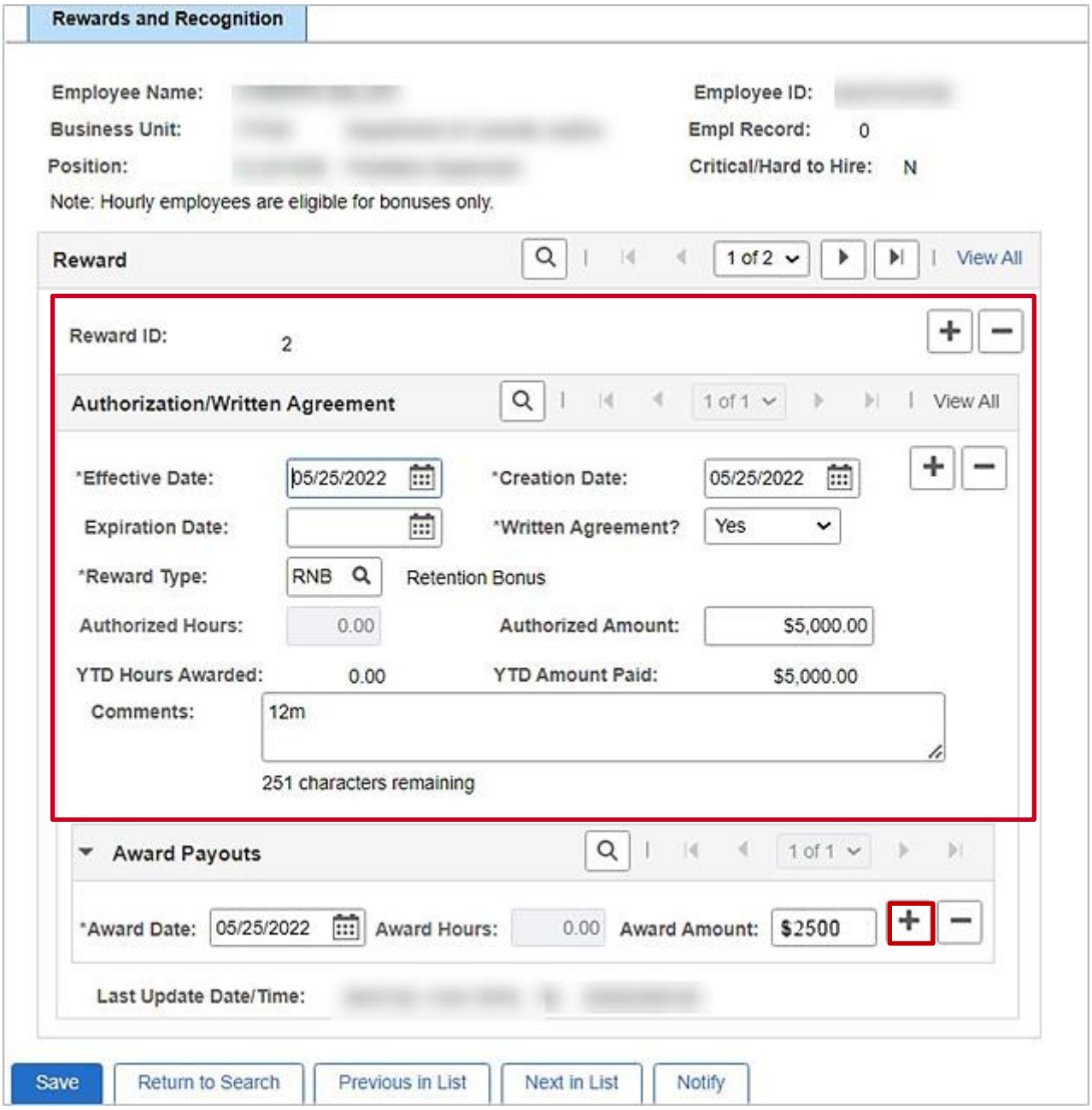


2. Enter the applicable employee's Employee ID in the **Empl ID** field.

   Note: You 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.

3. Click the **Search** button.

The **Rewards and Recognition** page for the applicable employee displays. The **Reward ID** is auto-assigned.



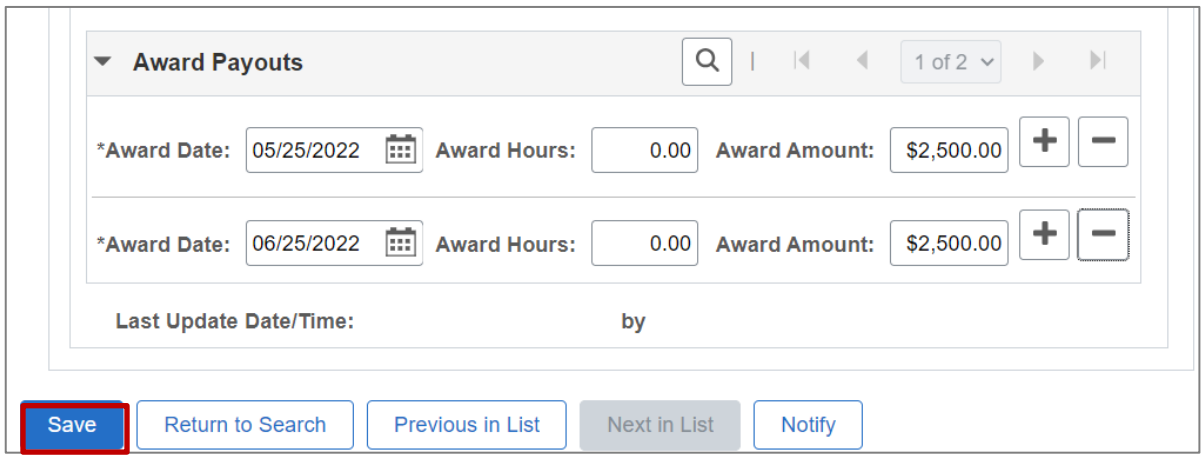
4. Enter the **Effective Date** of the Reward. This is the date that the award was made to the employee.
5. The **Creation Date** defaults to the current date was created.
6. Enter the **Expiration Date** the Reward and Recognition expires. Check the written agreement or Policy statement for information.
7. Click the **Written Agreement** dropdown button and select the applicable value (“Yes” or “No”).

8. Select the applicable **Reward Type**.
9. Complete either the **Authorized Hours** field or the **Authorized Amount** field by entering the applicable hours or amount respectively.

   Note: Depending on the type of reward (monetary or leave) the appropriate field will open for entry.
10. Enter any applicable comments (up to 254 characters) in the **Comments** field.
11. Enter the date the employee should receive the payment or hours in the **Award Date** field.
12. Enter the dollar amount or hours the employee should receive on that date.
13. Complete either the **Award Hours** field or the **Award Amount** field by entering the applicable hours or amount respectively.

    Note: If this is a "Leave" reward type, enter the hours in the **Award Hours** field. Upon saving, the value for **YTD Hours Awarded** field will be the total hours for the associated reward type during the leave year ending on January 9th. If this is a "Cash" reward type, enter the amount in the **Award Amount** field. Upon saving, the value for **YTD Amount Paid** field will be the actual paid amounts for the associated reward type during the fiscal year ending on June 30th.

    If the amount is going to be paid out on different dates, insert the applicable number of rows using the **Add a Row** icon and repeat Steps 11 and 12.



14. Click the **Save** button.

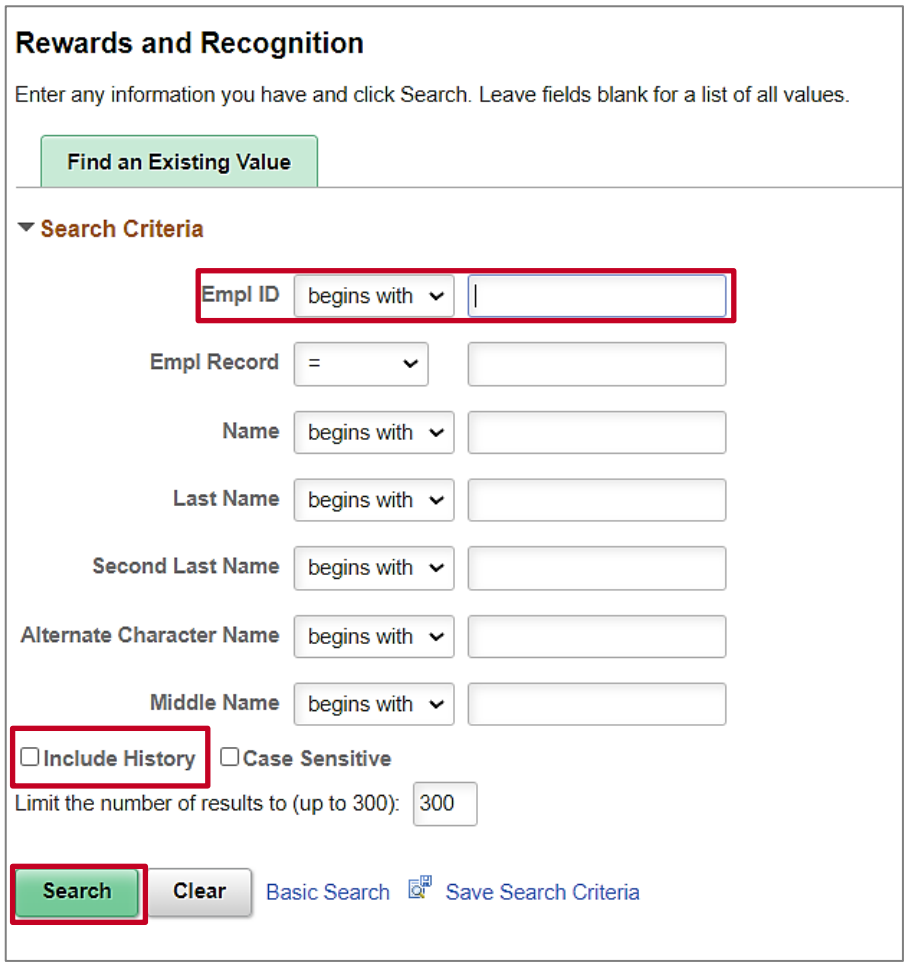
    Note: After saving, the **Last Update Date Time** and **By** fields auto-populate.

Adding an Additional Award

1. Navigate to the **Reward and Recognition** page using the following path:

   Menu > Workforce Development > Rwd and Recogn Maintenance

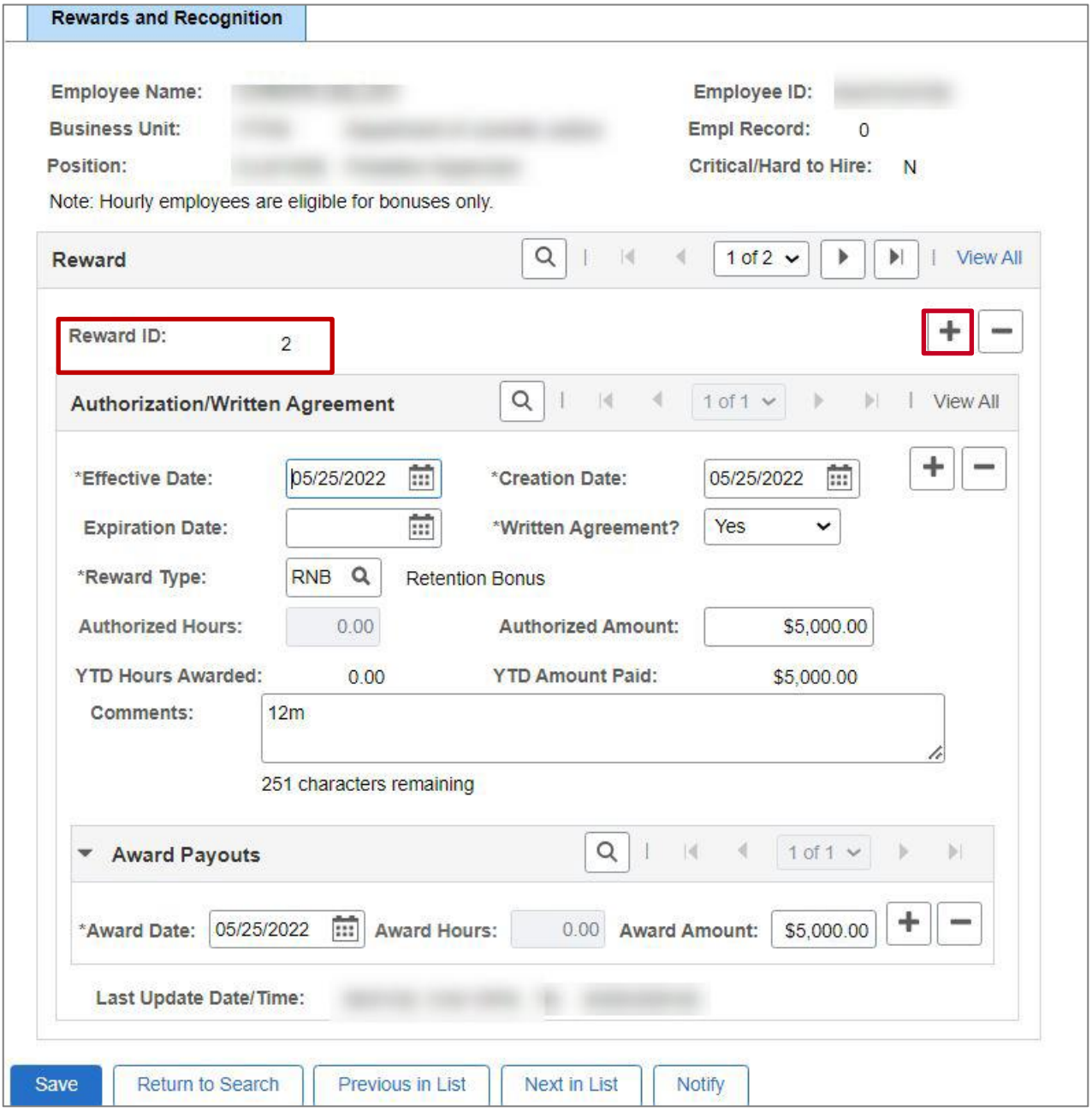
The **Rewards and Recognition Search** page displays.



2. Enter the applicable employee's Employee ID in the **Empl ID** field.
3. Click the **Search** button.

   Note: You 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.

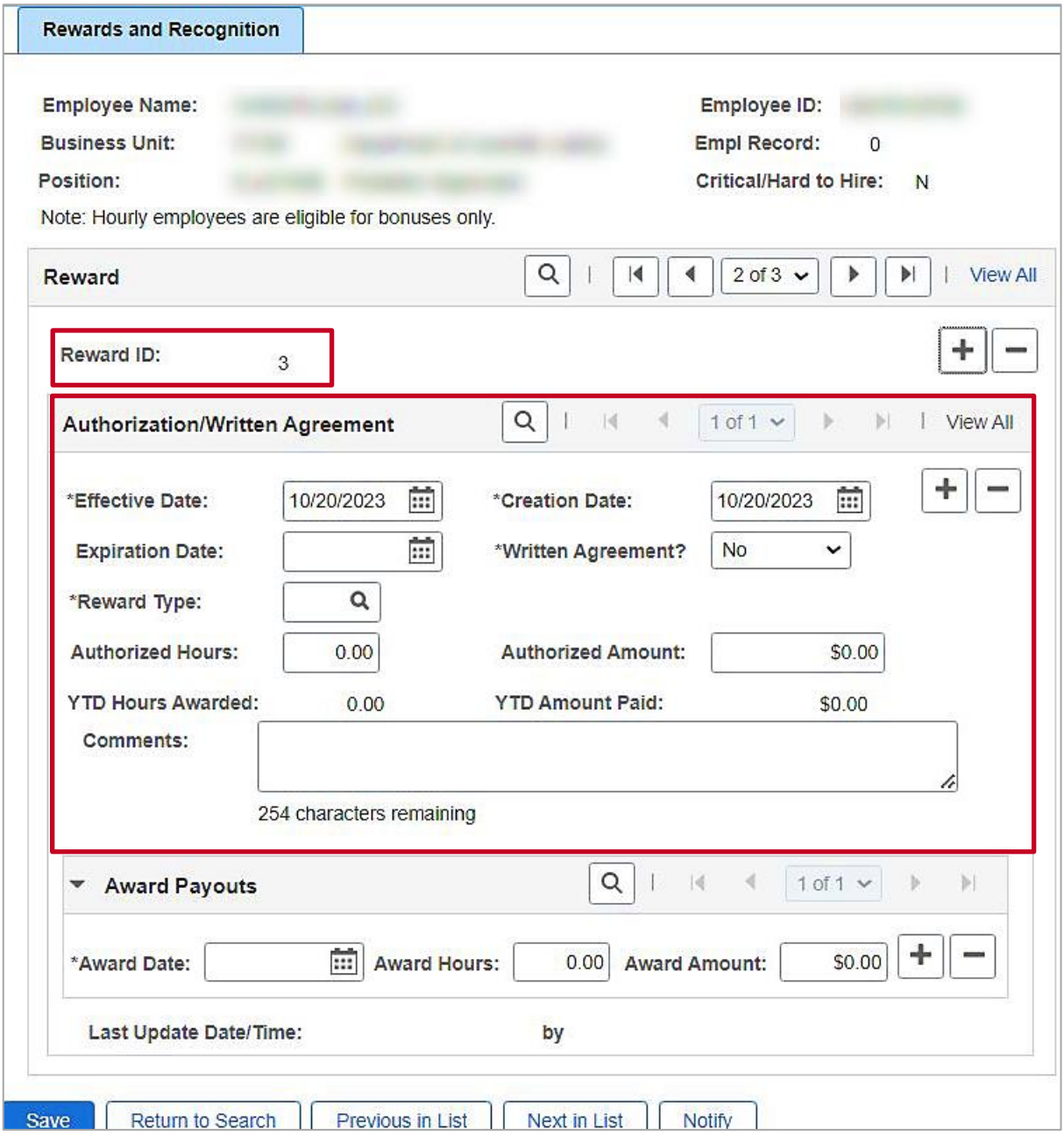
The **Rewards and Recognition** page for the applicable employee displays.



4. Click the **Add a Row** (+) icon in the **Reward ID Header** to add an additional Reward ID for the employee.

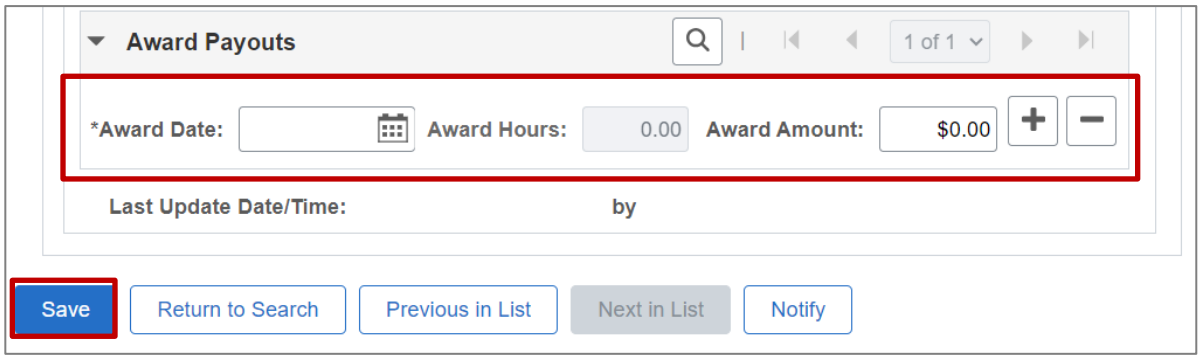
   Note: Validate that the insert has taken place at the **Reward ID** level and not the **Authorization/Written Notice** level.

The page refreshes and the next available **Reward ID** displays. The next **Reward ID** number is auto-assigned.



5. Enter the **Effective Date** of the Reward.
6. The **Creation Date** defaults to the date the Reward and Recognition was created.
7. Enter the **Expiration Date** the Reward and Recognition expires.
8. Click the **Written Agreement** dropdown button and select the applicable value (“Yes” or “No”).
9. Select the applicable reward type using the **Reward Type Look Up** icon.

10. Complete either the **Authorized Hours** field or the **Authorized Amount** field by entering the applicable in the corresponding field.
11. Enter any applicable comments (up to 254 characters) in the **Comments** field.



12. In the **Awards Payout** section, enter the **Award Date** which is the payout date of the Award.
13. Enter either the **Award Hours** or the **Award Amount** in the corresponding field.

    Note: If this is a "Leave" reward type, enter the hours in the **Award Hours** field. Upon saving, the value for **YTD Hours Awarded** will display the total hours for the associated reward type during the leave year ending on January 9th. If this is a "Cash" reward type, enter the amount in the **Award Amount** field. Upon saving, the value for **YTD Amount Paid** will display the actual, paid amounts for the associated reward type during the fiscal year ending on June 30th.

    If the amount is going to be paid out on different dates, insert the applicable number of rows using the **Add a Row** icon and repeat Steps 12 and 13.
14. Click the **Save** button.

    Note: After saving, the **Last Update Date Time** and **By** fields auto-populate.

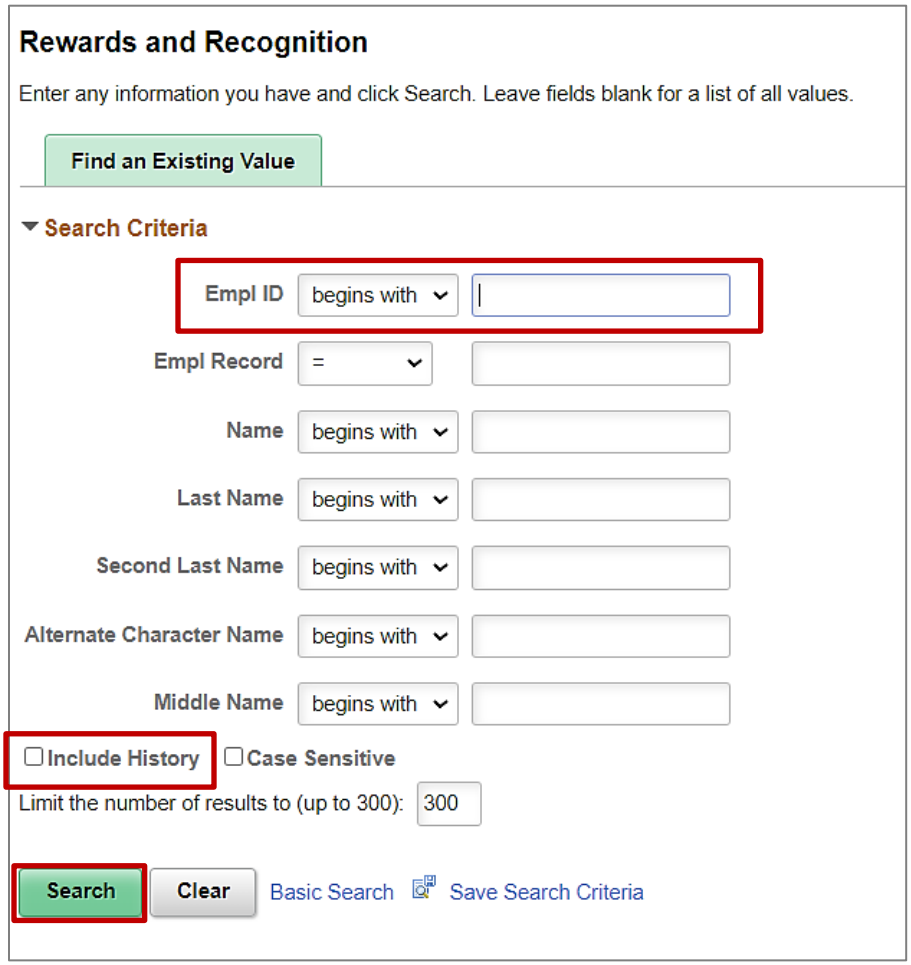
Adding a New Payout to an Existing Reward

Scenario: A project-based bonus with an authorized amount of $5,000 has been entered. The initial payment of $2,500 has been entered for payout on 6/30/2023. Now the end of the project has come and the additional $2,500 needs to be added for payout.

1. Navigate to the **Reward and Recognition** page using the following path:

   Menu > Workforce Development > Rwd and Recogn Maintenance

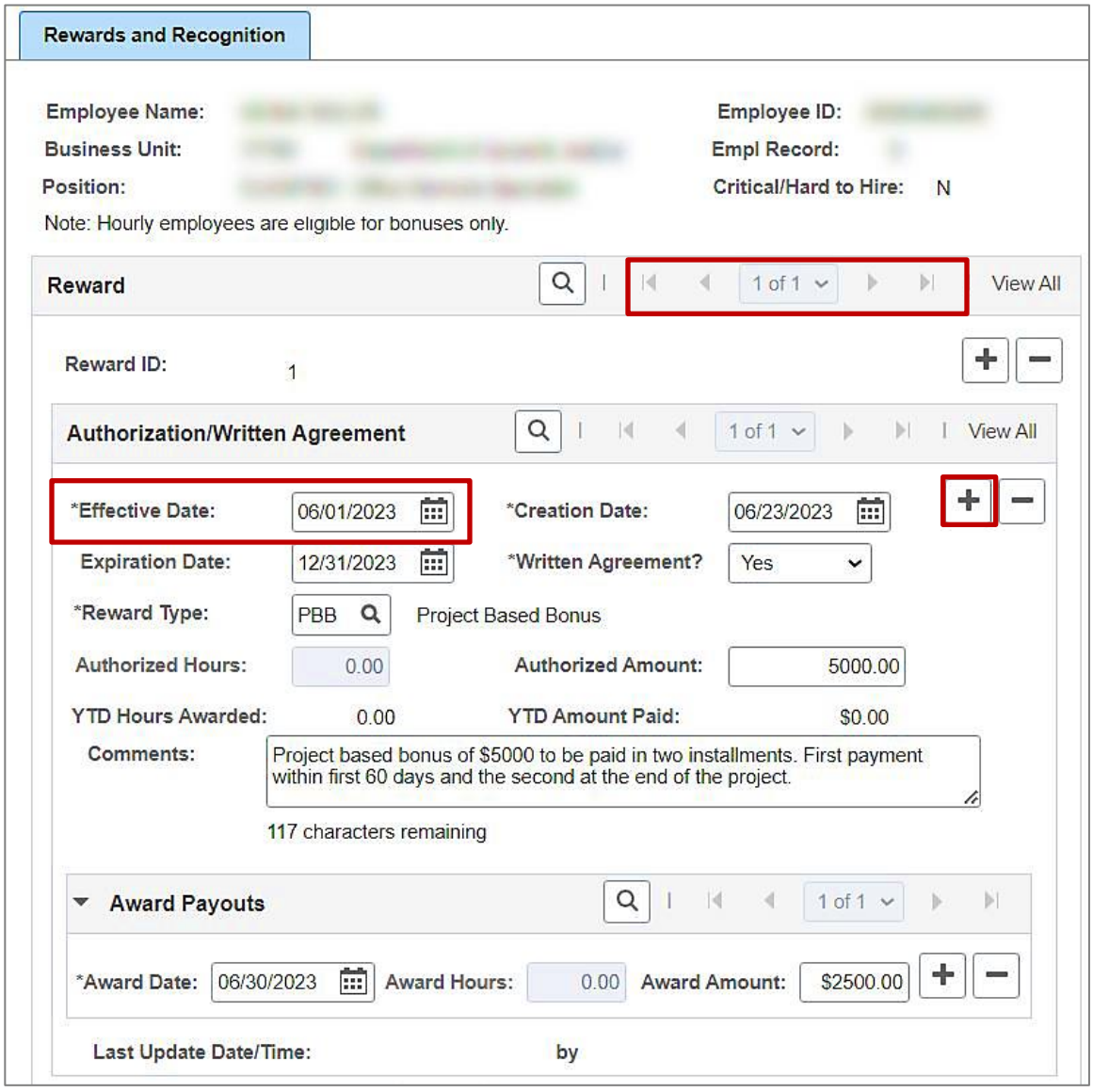
The **Rewards and Recognition Search** page displays.



2. Enter the applicable employee's Employee ID in the **Empl ID** field.
3. Click the **Include History** checkbox.
4. Click the **Search** button.

   Note: You 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.

The **Rewards and Recognition** page for the applicable employee displays.

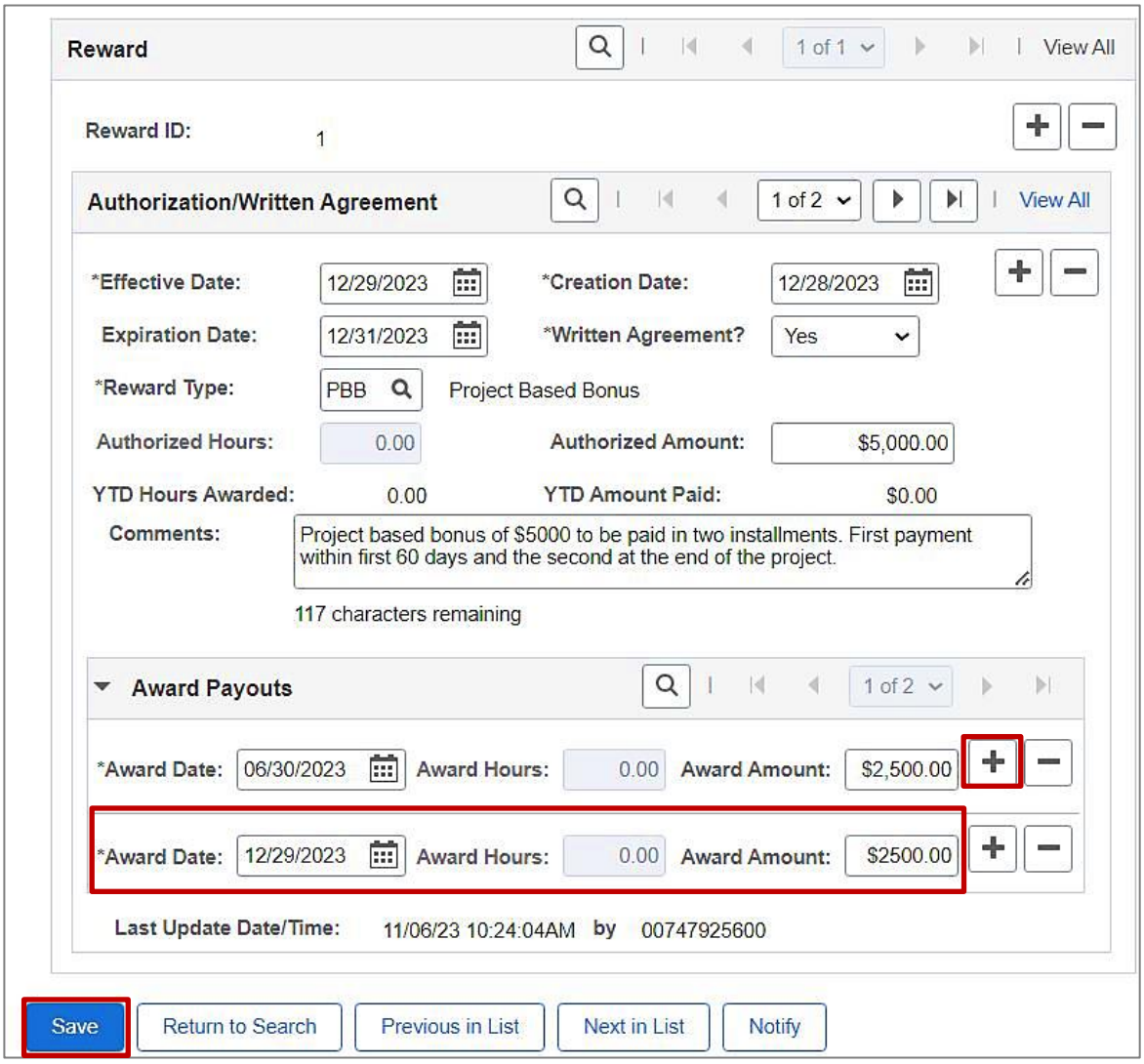


5. The first Reward ID displays by default. Use the arrows within the **Reward ID** header as needed to navigate to the **Reward ID** that requires the **Award Payout** section to be updated.

6. Click the **Add a Row** icon within the **Authorization/Written Agreement** section to update the existing Reward Type to add a new award payout.

7. Enter the **Effective Date**. This date can be the current date but cannot be same as the original effective date of the reward id.

The **Rewards and Recognition** page with new Award Payout.



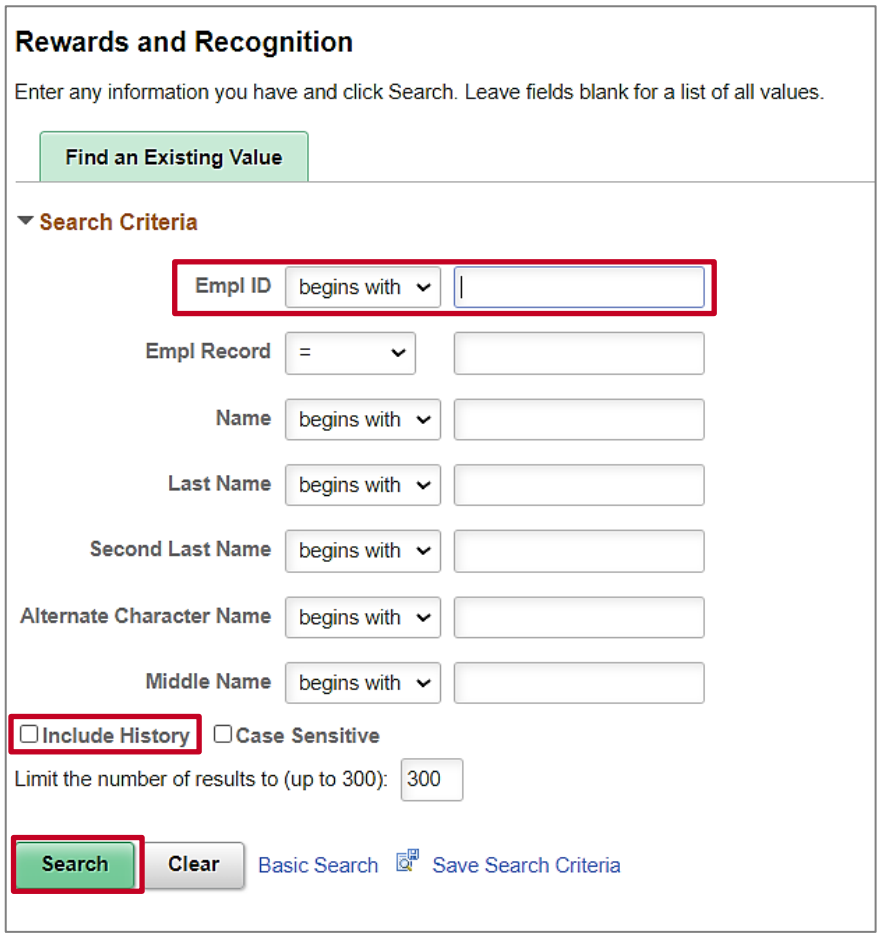
8. Click the **Add a Row** icon within the **Awards Payouts** section to add a new award payout.
9. Enter the **Award Date** which is the date the payment is to be made to the employee.
10. Enter the **Award Hours** or **Award Amount.**
11. Click the **Save** button.

Modifying (Correcting) an Existing Reward and Recognition Award

1. Navigate to the **Reward and Recognition** page using the following path:

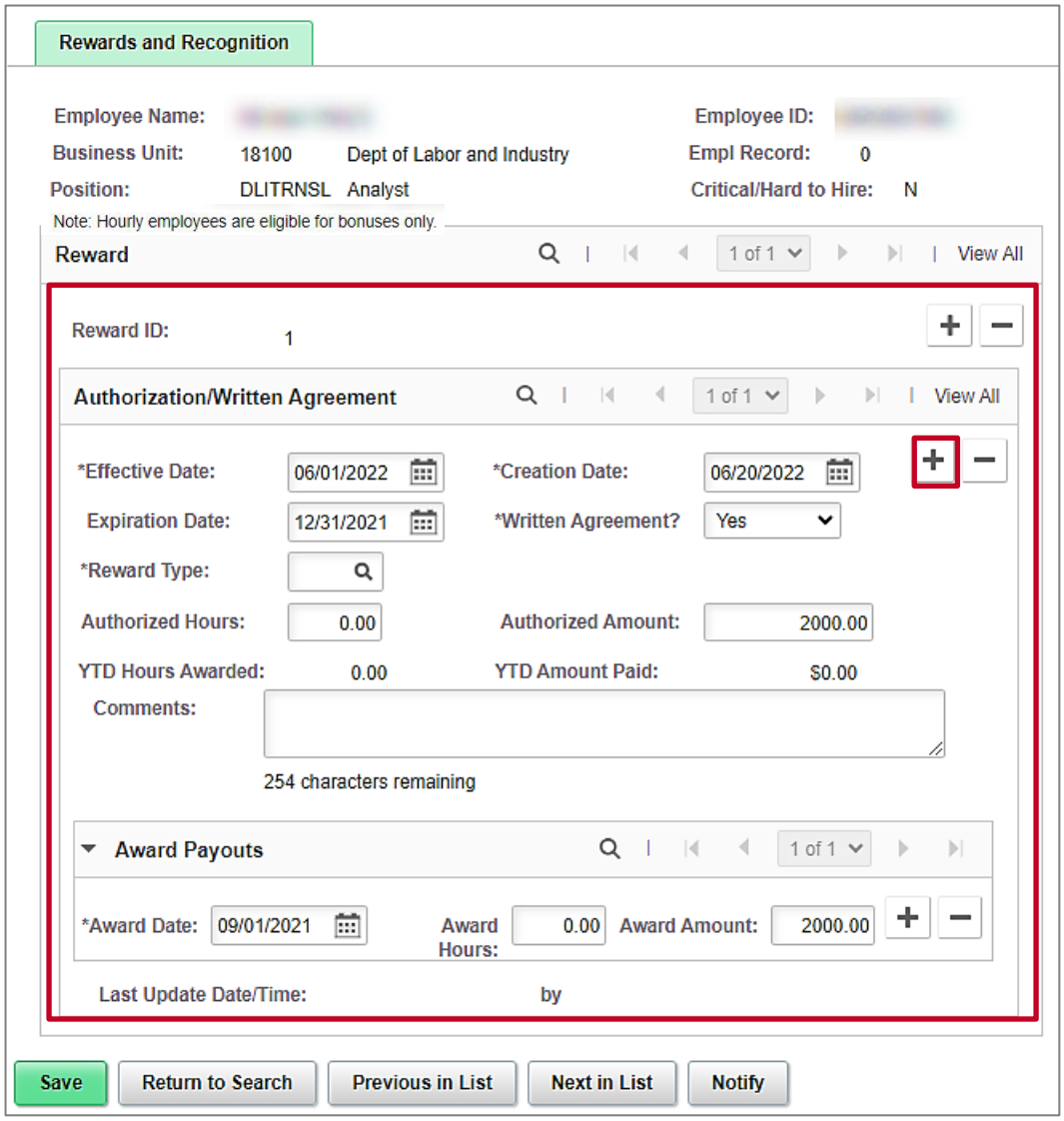
   Menu > Workforce Development > Rwd and Recogn Maintenance

The **Rewards and Recognition** search page displays.



2. Click on the **Include History** checkbox option. This will allow viewing of reward history.
3. Enter the applicable employee's Employee ID in the **Empl ID** field.
4. Click the **Search** button.

The **Rewards and Recognition** page for the applicable employee displays.

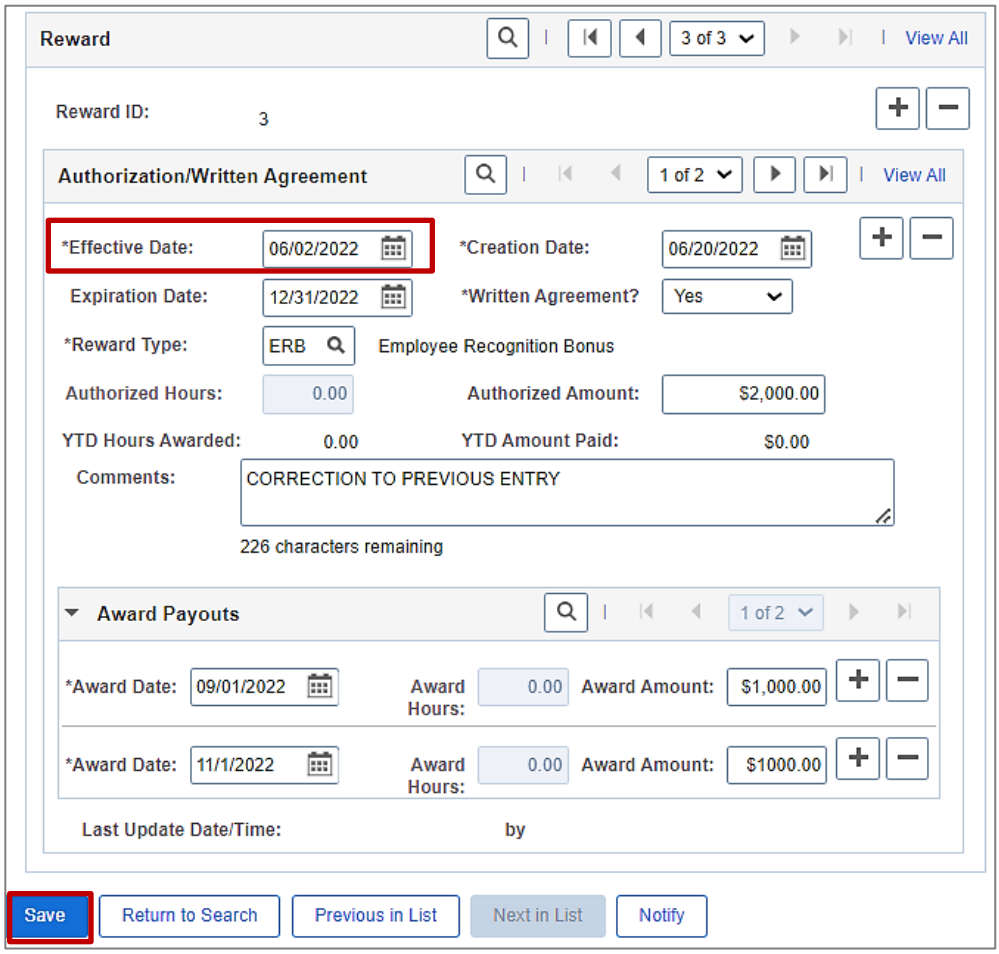


5. The first Reward ID displays by default. Use the arrows within the **Reward ID Header** as needed to navigate to the **Reward ID** that needs to be updated.

6. Use the arrows in the **Authorization/Written Agreement** section as needed to navigate to the Reward Type that needs to be updated.

7. Click the **Add a Row** icon within the **Authorization/Written Agreement** section to update the existing Reward Type.

   Note: After saving, the **Last Update Date Time** and **By** fields auto-populate.



8. Enter the **Effective Date** for the update. Use the day after the original effective date if that date has not already been used for the reward ID being corrected.

   Note: This page does not have the **Effective Sequence** field so the same effective date cannot be used within the same Reward ID.

9. The remaining fields default from the previous row for the Reward Type. Update the applicable fields to correct the entry.

   Note: The **Award Date** indicates the exact dates the payment should be made, or the hours should be awarded to the employee. In the case of monetary awards, the information in the Awards Payout section should be provided to your agency Payroll Administrator to payout via the SPOT tool.

10. Once all required updates are made, click the **Save** button.