

Time & Labor Setup Overview

This Job Aid provides users with the Time and Labor Employee Setup Administrator role guidance for the key activities involved in Time and Attendance employee setup. The employee setup process involves the assignment of time reporting attributes to employees which control the Timesheet fields and values available, and the business rules applied during Timesheet entry and processing.

In Cardinal, Time and Labor (TL) enrollments for Time Reporter Data and Comp Plans are controlled by the TL Auto Enrollment process, which automates most employee setup in Time and Attendance. Criteria used by the TL Auto Enrollment process is configured based on state and Agency policies and business practices. The TL Auto Enrollment batch process runs daily to evaluate Job Data changes (i.e. new hires, terminations, transfers, position changes, etc.) and assigns appropriate Timesheet reporting and processing values.

Time Reporting Codes (TRCs) for Online and Interface Time Entry are used to report time on the Timesheet. The Time Administration process translates the Reported Time TRC to the relevant Payable Time TRC based on the employee's Workgroup and TRC Program.

REG – Regular Time is reported for all employees. Time Admin translates Reg hours to Payable Time:

- ERGz – for Emergency Hourly Employees
- RGHZ – for Hourly Employees
- RNPz – for Hourly Non-Paid
- RGSz – for Salaried Employees

OVT – OT @ Time and Half for relevant employees. Time Admin translates OVT hours to Payable Time:

- OTHz – for Hourly Employees
- OTSz – for Salaried Employees

The 4th Character (z value) will depend on the type of Workgroup:

- Full Approval Workgroup
 - A will be generated for Payable Time Approval
- Partial Approval Workgroup
 - A: Payable Time Approval Required
 - X: No Payable Time Approval
 - The workgroup will only offer one option for the Reported Time TRC Source. For example, REG will not require approval, but OVT will require approval
- Interfacing Workgroup
 - X will be generated because Payable Time Approval is not required. Approval for these Workgroups is on Reported Time.

TL Setup Overview (continued)

Manual employee setup steps are required for certain eligibility values and to assign employee Work Schedules. Time Reporter and Comp Plan enrollments may also need to be maintained manually in cases where the employee is an exception to the TL Auto Enrollment criteria.

The Time & Labor Employee Setup Administrator's responsibilities include:

- Reviewing Agency Time Reporter and Comp Plan Enrollment Criteria
- Monitoring TL Auto Enrollment Results
- Reviewing and Resolving TL Auto Enrollment issues
- Monitoring and Maintaining TL Eligibility for Overtime Leave, Shift Differential, and Commuter Imputed Income
- Maintaining TL Bypass
- Maintaining Time Reporter Enrollment and Comp Plan Enrollment
- Monitoring and Maintaining Employee Work Schedules

Navigation Note: Please note that you may see 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.



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TL Auto Enrollment Overview

Cardinal runs the TL Auto Enrollment process every two hours during the workweek. Cardinal uses the Job Data during the TL Auto Enroll process to assign Time Reporter and Comp Plan values to employees. The following **Job Data** fields are relevant to Time & Labor:

- Business Unit
- Department ID
- HR Status (“Active” or “Inactive”)
- Employee Type (“Salaried” or “Hourly”)
- Fair Labor Standards Act (FLSA) Status (“Exempt” or “Non-Exempt”)
- Pay Group
- Job Code
- Salary Grade
- Employee Class
- Absence System

Inaccurate data values for these fields could result in inaccurate Time Reporter attributes being assigned to the employee during the TL Auto Enrollment process. In these cases, work with Agency Human Resources (HR) to make the required corrections.

In addition, TL Eligibility enrollment impacts the employee’s eligibility for Shift Differential, Commuter Imputed Income, and Overtime Leave.

Changes in Job Data and TL Eligibility, including position changes, new hires, terminations, and Agency transfers, are processed by the TL Auto Enrollment process. For example, terminated employees and employees with an inactive HR status will be assigned to an “Inactive” time reporting group to prevent Timesheets from being submitted or interfaced beyond the date the employee became inactive.



Reviewing Agency Time Reporter and Comp Plan Enrollment Criteria

Time Reporter Data Criteria and Comp Plan Enrollment Criteria Queries:

Time Reporter Data Criteria and Comp Plan Enrollment Criteria queries display values for Time Reporter Data and Comp Plan Enrollment set out by each individual agency. The TL Auto Enrollment process looks at an agency's criteria and an employee's Job Data and determines what values they will receive in Maintain Time Reporter Data and Comp Plan Enrollment.

Sample RTA806 Time Reporter Criteria Query (V_TA_TIME_REPORTER_CRITERIA):

Priority	Business Unit	Department ID	HR Status	Employee Type	FLSA Status	Pay Group	Job Code	Salary Grade	Employee Class	Shift Differential	Time Reporter	Reporting Template	Workgroup	Allowed Workgroup	Taskgroup	Rule Element 3	Rule Element 3 Override	Rule Element 4	Rule Element 4 Override	Rule Element 5	Rule Element 5 Override
650	15100	99999	A	S	N	SM1					A		SNRP07E1	V748SNP071D1	15100BA		N	07:40	N	000:240	N
650	15100	99999	A	H	N	EW1					A		HNF07BP1		15100BA	1400	R	07:40	N		N
669	15100	99999	A	S		SM1					A		SERP07E1	V748SER071D1	15100BA		N	07:40	N	000:240	N

Sample RTA806 Comp Plan Enrollment Criteria Query (V_TA_COMP_PLAN_CRITERIA):

Priority	Business Unit	Department ID	HR Status	Employee Type	FLSA Status	Pay Group	Job Code	Salary Grade	Employee Class	Absence System	OT Leave Eligible	Time Reporter Status	Comp Plan Enrollment Status	Comp Plan
650	15100	99999	A	S	N	SM1						A	A	PAID-OVS
650	15100	99999	A	S	N	SM1				AM		A	I	OT_LEAVE
650	15100	99999	A	S		SM1			AHD			A	I	PAID-OVS
669	15100	99999	A	S		SM1						A	A	PAID-OVS
350	STATE	99999	A	S						AM		A	A	CARDINAL
350	STATE	99999	A	S						AM		A	A	COMP_LEAVE
350	STATE	99999	A	S						OT		A	A	EARNOT-DCS
350	STATE	99999	A	S	N					OT		A	A	EARNOT-DCT
350	STATE	99999	A	S						OT		A	A	NONPROD_PD
350	STATE	99999	A	S						OT		A	A	NONPROD_RQ
345	STATE	99999	A	S	N					AM		A	A	OT_LEAVE
355	STATE	99999	A	S						AM	Y	A	A	OT_LEAVE
350	STATE	99999	A	S	N							A	A	PAID-OVS
369	STATE	99999	A	H								A	A	PAID-OVS
350	STATE	99999	A	H	N							A	A	PAID-OVT
350	STATE	99999	A	S	N							A	A	PAID-OVT

For further information about these queries, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.



Monitoring TL Auto Enrollment Results

The Time & Labor Setup Administrator should monitor the TL enrollments for accuracy using the Time Reporter Changes Query and the Comp Plan Enrollment Audit Query. For further information about these queries, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.

Sample RTA109 Time Reporter Changes Query (V_TA_TIME_REPORTER):

V_TA_TIME_REPORTER - Time Reporter Changes

*Business Unit 99900

Dept ID

Employee ID

*From Date 01/01/2023

*To Date 01/31/2023

View Results

Download results in: Excel Spreadsheet CSV Text File XML File (4381 kb)

View All First 1-100 of 5921 Last

Row	Name	Employee ID	Empl Record	Position Number	Business Unit	Dept ID	HR Status	Changed On	Changed By	Changed Field	Old Value	New Value	Change Effective Date
1			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	EMPLID			2022-12-30
2			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	EMPL_RCD	0		2022-12-30
3			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	EFFDT		2022-12-30	2022-12-30
4			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	TIME_RPTG_STATUS	A		2022-12-30
5			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	TIME_RPTR_IND	E		2022-12-30
6			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	WORKGROUP	INACTIVE		2022-12-30
7			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	TASKGROUP	VANONE		2022-12-30
8			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	TL_TIME_TO_PAY	N		2022-12-30
9			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	TIMEZONE	EST		2022-12-30
10			0	ABC01014	99900	111723	I	01/07/2023 12:44:01AM	AA_CARDINAL_BATCH_TA	PROCESS_INSTANCE			2022-12-30
11			0	ABC01014	99900	111723	I	01/07/2023 12:44:02AM	AA_CARDINAL_BATCH_TA	EMPLID			2023-01-29

Sample RTA776 Comp Plan Enrollment Audit Query (V_TA_COMP_PLAN_ENROLL_AUDIT):

V_TA_COMP_PLAN_ENROLL_AUDIT - Comp Plan Enrollment Audit

*Business Unit 99900

Department ID

Employee ID

*From Date 01/01/2023

*To Date 01/31/2023

View Results

Download results in: Excel Spreadsheet CSV Text File XML File (361 kb)

View All First 1-100 of 1010 Last

Row	Employee Name	Employee ID	Employee Record	Position Number	Department ID	Business Unit	HR Status	Comp Time Plan	Comp Plan Effective Status	Comp Plan Effective Date	Username Who made the change	Date and Time Stamp	Audit Action
1			0	ABC01014	111723	99900	I	EARNOT-OCS	I	12/30/2022	AA_CARDINAL_BATCH_TA	01/07/2023 12:44:04AM	A
2			0	ABC01014	111723	99900	I	NONPROD_PD	I	12/30/2022	AA_CARDINAL_BATCH_TA	01/07/2023 12:44:04AM	A
3			0	ABC01014	111723	99900	I	NONPROD_RQ	I	12/30/2022	AA_CARDINAL_BATCH_TA	01/07/2023 12:44:04AM	A
4			0	ABC01014	111723	99900	I	PAID-ONCHP	I	12/30/2022	AA_CARDINAL_BATCH_TA	01/07/2023 12:44:04AM	A
5			0	ABCW1JSE	111723	99900	A	PAID-CALHP	I	01/14/2023	AA_CARDINAL_BATCH_TA	01/20/2023 12:41:59AM	A
6			0	ABCW1JSE	111723	99900	A	PAID-OVT	I	01/14/2023	AA_CARDINAL_BATCH_TA	01/20/2023 12:41:59AM	A
7			0	ABC00059	120706	99900	I	EARNOT-OCS	I	01/13/2023	AA_CARDINAL_BATCH_TA	01/14/2023 12:48:44AM	A
8			0	ABC00059	120706	99900	I	NONPROD_PD	I	01/13/2023	AA_CARDINAL_BATCH_TA	01/14/2023 12:48:44AM	A
9			0	ABC00059	120706	99900	I	NONPROD_RQ	I	01/13/2023	AA_CARDINAL_BATCH_TA	01/14/2023 12:48:44AM	A
10			0	ABC00059	120706	99900	I	PAID-ONCHP	I	01/13/2023	AA_CARDINAL_BATCH_TA	01/14/2023 12:48:44AM	A



Reviewing and Resolving TL Auto Enrollment Issues

If appropriate state or Agency criteria does not exist to assign valid values to an employee based on the employee's Job Data, the employee will be assigned to the "Invalid" Workgroup. The TL Setup Administrator should review the Time Reporter Auto Enrollment Exceptions Query to identify this issue and other enrollment issues. For further information about this Query, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.

Sample RTA715 Time Reporter Auto Enrollment Exceptions Query (V_TA_AUTO_ENROLL_EXC):

V_TA_AUTO_ENROLL_EXC - Time Reporter Exceptions Query

*Business Unit

Dept ID

Location

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

View All First 1-1 of 1 Last

Row	NAME	ID	Empl Record	Position	Type	Unit	Location	Dept ID	Descr	Group	Status	Workgroup	Taskgroup	FLSA Stat	HR Status	REASON
1			0	ABCW1RA4	H	99900	10509	410820	Regional 9 Charlottesville	BW3	A	HNRI07BP6	99900ICCO	N	I	I

The Reason Codes displayed on the RTA715 Time Reporter Auto Enrollment Exceptions Query are used to explain why each employee was identified as an Auto Enrollment exception. The following table provides some of the common Reason Codes and a definition for each.

Reason Code	Definition
A	Active Employee in Inactive Workgroup
B	Active Employee in Invalid Workgroup
C	Active Employee not in a valid Taskgroup
D	Active Employee not in a valid Workgroup
E	Active Employee with Inactive Time Reporter Status
F	Rule Element 3 is missing for Active Hourly Employee
G	Rule Element 4 is missing for Active Employee
H	Rule Element 5 is missing for Active Salaried Employee
I	Inactive Employee not in Inactive Workgroup
J	Inactive Employee with Active Time Reporter status for more than 60 days after termination

The TL Setup Administrator should research and work with an Agency HR Administrator to update Job Data as needed. Consider if the employee needs to be set up as a Time Reporter manually or contact Post Production Support (PPS) if the Agency criteria for TL Auto Enrollment needs to be modified. If Job Data is corrected, the TL Auto Enrollment process will re-evaluate the employee on the next run and update the Time Reporter values.

Monitoring and Maintaining TL Eligibility

TL Eligibility is used to define whether the employee is eligible for Overtime Leave, Shift Differential, or Commuter Imputed Income. TL Eligibility enrollments are manually maintained by the TL Setup Administrator and not by the TL Auto Enrollment process.

The following TL Eligibility values are used to control employee eligibility:

- **Effective Date:** The date the TL Eligibility is effective should match the date of the Job Data or eligibility change that impacts time reporting for the employee (e.g., hire, termination, transfer, position change, etc.)
- **Eligibility Type:** The option(s) that the employee is eligible for (Overtime Leave, Shift Differential, and/or Commuter Imputed Income)
 - **Overtime Leave:** Eligibility to report Overtime Leave earned or taken. This is only applicable to Agencies using Cardinal Absence Management and only needed when the Agency does not have Comp Plan enrollment criteria for Overtime Leave

Note: If an Agency does not payout Overtime Leave balances at the time a Salaried employee transfers from Non-Exempt to Exempt, then the employee should be enrolled in the Overtime Leave Eligibility.

- **Shift Differential:** Eligibility to report Shift Differential
 - **Step:** Identifies the Shift Type and Shift 2 / Shift 3 rates. The fields display based on the Step selected and are not editable. Shift Step/Rate configuration is done by the Cardinal Post Production Support (PPS) team
 - **Shift Type:** Amount or percentage
 - **Shift 2:** Rate applied when Shift 2 is selected on the Timesheet
 - **Shift 3:** Rate applied when Shift 3 is selected on the Timesheet
 - **Include Shift** checkbox is not used by Cardinal.
 - Overtime is always included in Shift calculation



- **Commuter Imputed Income:** Cardinal supports automatic daily rate calculations for Commuter Imputed Income for eligible employees at Agencies with a permanently assigned state vehicle used to commute to and from work. The Commuter Imputed Income rule will generate one day’s imputed income on any day where regular hours were worked and no telework code was indicated on the Timesheet. This one day’s rate will be applied in payroll to increase the employee’s taxable gross based on the approved rate for the current year. Employees must be manually enrolled in TA Commuter Imputed Income.

Note: Agencies using Payroll Additional Pay for earnings code CCR – Company Car should not enroll employees in TA Commuter Imputed income.

- ◆ **Status:** The eligibility status indicates whether the employee is eligible for the Eligibility Type
 - **A:** Active
 - **I:** Inactive

The TL Setup Administrator should frequently validate the TL Eligibility enrollments for accuracy using the Active TL Eligibility Query and the TL Eligibility Audit Query. For further information about these Queries, refer to the Cardinal HCM Time and Attendance Reports Catalog. This Reports Catalog can be found on the Cardinal website in **Reports Catalogs** under **Resources**.

Sample RTA779 Active TL Eligibility Query (V_TA_ELIGIBILITY_ENROLL_LIST):

V_TA_ELIGIBILITY_ENROLL_LIST - Active TL Eligibility

*Business Unit 99900

Dept ID

Emplid

TL Eligibility Type

*As Of Date 11/30/2022

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

View All First 1-4 of 4 Last

Row	Employee Name	Employee ID	Employee Record	Position Number	JOB Business Unit	Department ID	HR Status	Employee Type	FLSA Status	Employee Class	Job Code	TL Eligibility Type	COVA Eligibility Effective Date	Eligibility Business Unit	Step	Rate Type	Include Overtime	Shift 2 Rate	Shift 3 Rate	Action
1			0	ABC00212	99900	420712	A	S	N	ONC	96613	SHFT	07/10/2022	99900	6	A	Y	0.000	2.210	VERIFY
2			0	ABC00919	99900	420712	A	S	N	ONC	96614	SHFT	07/10/2022	99900	5	A	Y	0.000	2.380	VERIFY
3			0	ABCW1Y1	99900	420712	A	H	N	GNW	W96613	SHFT	09/10/2021	99900	1	A	Y	0.000	1.510	VERIFY
4			0	ABC00143	99900	420712	A	S	N	ONC	96613	SHFT	07/10/2022	99900	7	A	Y	0.000	1.700	VERIFY



Time & Attendance Job Aid

TA372_TL Setup Overview

Sample RTA777 TL Eligibility Audit Query (V_TA_ELIGIBILITY_ENROLL_AUDIT):

V_TA_ELIGIBILITY_ENROLL_AUDIT - TL Eligibility Audit

*Business Unit

Dept ID (Blank for all)

Employee ID (Blank for all)

*From Date

*To date

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

View All First 1-3 of 3 Last

Row	Employee Name	Employee ID	Employee Record	Position Number	Department ID	Business Unit	HR Status	Custom TA Eligibility Type	Eligibility Effective Date	Eligibility Effective Status	Step	Username who made the change	Date and Time Stamp	Audit Action-Add,Delete,Change
1			0	ABC00919	420712	99900	A	SHIFT	06/10/2023	A	9		06/20/2023 4:05:45PM	Add
2			0	ABC00143	420712	99900	A	SHIFT	06/10/2023	A	8		06/20/2023 4:06:11PM	Add
3			0	ABC00212	420712	99900	A	SHIFT	06/10/2023	A	10		06/20/2023 4:06:33PM	Add

Maintaining TL Eligibility

1. Access the **TL Eligibility** page using the following path:

Menu > Time and Labor > Enroll Time Reporters > Eligibility

The **Eligibility Search** page displays.

Eligibility

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


[Find an Existing Value](#) [Add a New Value](#)

▼ **Search Criteria**

Business Unit	begins with	▼	<input type="text"/>
Empl ID	begins with	▼	<input type="text"/>
Empl Record	=	▼	<input type="text"/>
First Name	begins with	▼	<input type="text"/>
Last Name	begins with	▼	<input type="text"/>

Case Sensitive

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

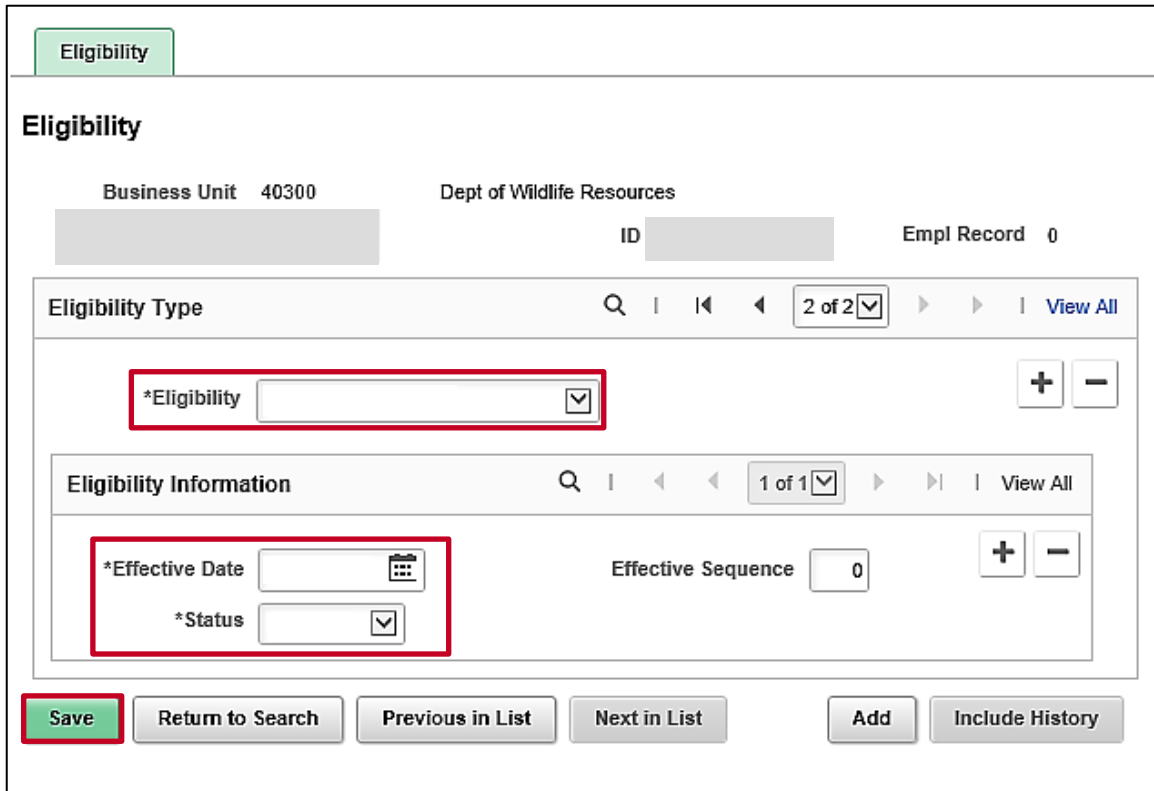
[Search](#) [Clear](#) [Basic Search](#)  [Save Search Criteria](#)

2. Enter the applicable Business Unit in the **Business Unit** field.
3. Enter the applicable employee's Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search for the employee by the Empl Record, First Name, or Last 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 **Eligibility** page displays for applicable employee.



Eligibility

Business Unit 40300 Dept of Wildlife Resources

ID [redacted] Empl Record 0

Eligibility Type 2 of 2 View All

*Eligibility [dropdown] + -

Eligibility Information 1 of 1 View All

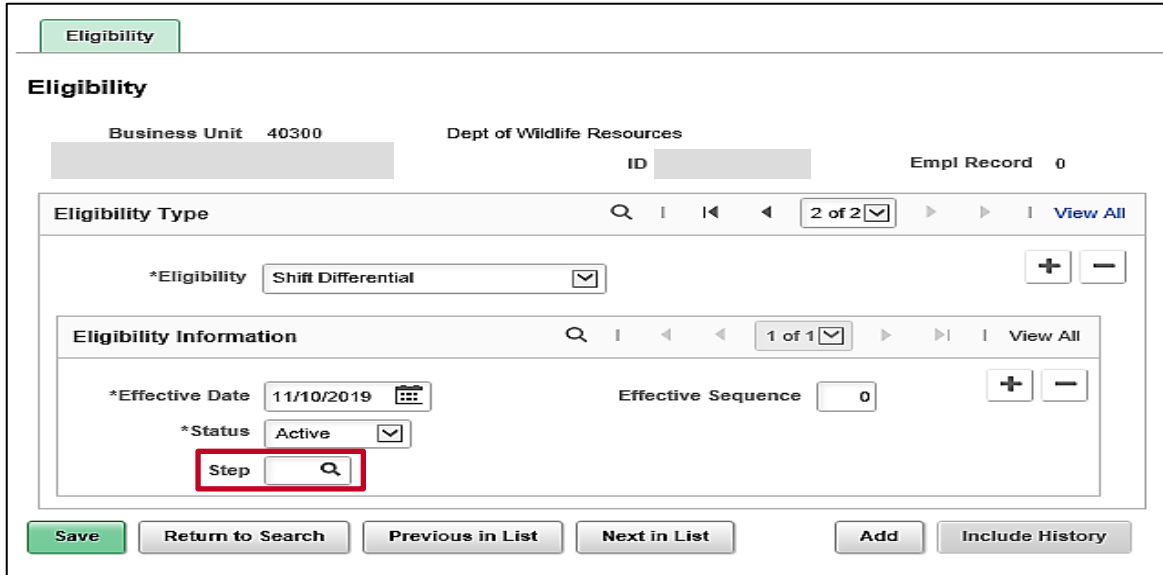
*Effective Date [calendar icon] Effective Sequence 0 + -

*Status [dropdown]

Save Return to Search Previous in List Next in List Add Include History

5. Review any existing eligibility for the employee.
 6. Select the applicable type of Eligibility using the **Eligibility** field dropdown button.
 7. Enter the applicable date in the **Effective Date** field or select the applicable date using the **Effective Date Calendar** icon.
 8. Click the **Status** field dropdown button and select the “Active” list item.
- Note:** If the Eligibility Type is “Shift Differential”, continue with Step 9. For “Overtime Leave” or “Commuter Imputed Income”, proceed to Step 10.

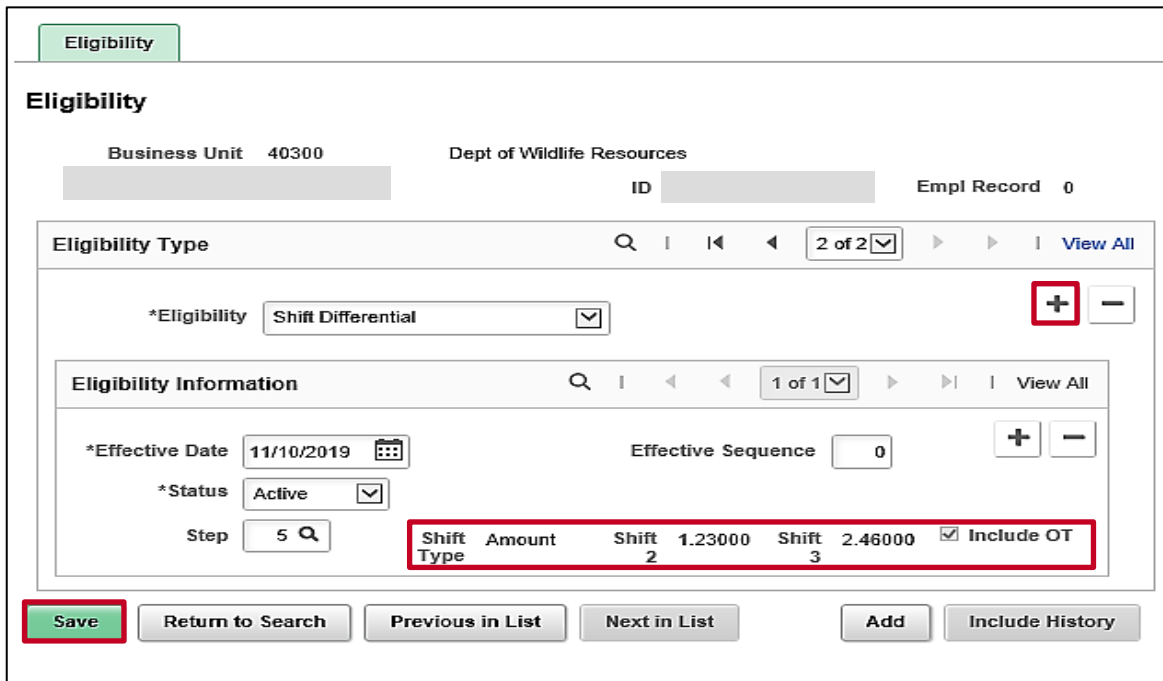
The **Eligibility** page refreshes and the **Step** field displays when “Shift Differential” is selected.



The screenshot shows the 'Eligibility' page for Business Unit 40300 and Dept of Wildlife Resources. The 'Eligibility Type' is set to 'Shift Differential'. The 'Eligibility Information' section shows an effective date of 11/10/2019 and a status of 'Active'. The 'Step' field is highlighted with a red box and contains a search icon.

9. Select the applicable Step using the **Step Look Up** icon.

The **Eligibility** page refreshes and displays the detailed information for the selected Step.



The screenshot shows the 'Eligibility' page with detailed information for Step 5. The 'Step' field is set to 5. A table of Shift Types and Amounts is displayed, with the 'Include OT' checkbox checked. The 'Save' button is highlighted with a red box.

Shift Type	Amount	Shift 2	Shift 3	Include OT
	1.23000	2.46000		<input checked="" type="checkbox"/>

10. If additional Eligibility Types need to be added, click the **Add a New Row** icon and repeat the previous steps as applicable. If no additional Eligibility Types need to be added, proceed to the next step.

Note: A new row will need to be added and completed for each Eligibility Type.

11. Click the **Save** button.

Time Reporter Data

The Time Reporter enrollment controls the time reporting attributes associated with the employee including Timesheet fields, values, and the business rules applied during Timesheet entry/processing. The TL Auto Enrollment process assigns effective dated Time Reporter values on the **Maintain Time Reporter Data** page.

Note: The Agency Criteria is used by TL Auto Enrollment to enroll the employee. If an override is needed, refer to the [Maintaining TL Bypass Auto Enroll](#) section of this Job Aid.

The following **Time Reporter Data** fields are used in Cardinal:

- **Effective Date:** The date the Time Reporter enrollment is effective. This date should match the date of the Job Data or eligibility change that impacts time reporting (hire, termination, transfer, position change, etc.)
- **Status:** Employee status indicating if time can be reported either on the Timesheet directly or via interfaces:
 - **A:** Active
 - **I:** Inactive (employee is terminated or will not have time or absences reported in Cardinal online or via interface)

Workgroup: Represents a group of employees that share compensation and rule processing requirements for time reporting, FLSA reporting, and approvals. The Workgroup is a 9-character acronym where each value identifies a characteristic for the Time Reporter (employee). The following table provides the definition and possible values for each character:

Character	Defines	Values
1 st	Employee Type	H = Hourly, S = Salaried
2 nd	FLSA Status	N = Nonexempt, E = Exempt
3 rd	Employee Category	1 = Type 1, 2 = Type 2, 3 = Type 3 A = Additional Pay Only, P = Per Diem Type R = Regular, M = Emergency, J = Judge, L = Law Enforcement F = Fire Prevention, S = Student
4 th	Approval Type	I = Reported Time for Interfaced F = Payable Time for Online Full Approval P = Payable Time for Online Partial Approval
5 th – 6 th	FLSA Period	07 , 12 , 21 , 28 Days
7 th	Pay Cycle	B = Biweekly, 1 = SM1, 2 = SM2, M = Monthly
8 th	Time Reporter Type	E = Exception, P = Positive
9 th	FLSA Start Day	1 = Sun, 2 = Mon, 4 = Wed, 6 = Fri, 7 = Sat

Workgroup Examples

Salaried Workgroup: SERP071E6	Hourly Workgroup: HNR07BP1
Salaried	Hourly
Exempt	Non-Exempt
Regular	Regular
P = Online Partial Approval	F = Online Full Approval
07 = FLSA Period = 07 Days	07 = FLSA Period = 07 Days
1 = Pay Cycle Semi-Monthly 1	B = Pay Cycle Biweekly
E = Exception Time Reporter	P = Positive Time Reporter
6 = FLSA Start Day Friday	1 = FLSA Start Day Sunday

- Taskgroup:** Represents a group of employees that share time and task reporting requirements impacting the available Timesheet fields. This is a Time Reporter value that defines the Timesheet template used to collect and process time for the employee. The Taskgroup name can be used to quickly identify Timesheet characteristics. The following table provides a breakdown of the Taskgroup characters and examples:

Taskgroup (XXXXX is the Business Unit)	Online or Interfacing Employee	ChartFields	User Field 4
XXXXXBBA	Online	Not Available	Not Available
XXXXXCOP	Online	Optional	Not Available
XXXXCCRQ	Online	Required	Not Available
XXXXICCO	Interfacing	Optional	Interface Filename
XXXXICCR	Interfacing	Required	Interface Filename
XXXXXIN	Interfacing	Not Available	Interface Filename
VANONE	Only used when the employee is enrolled in the INACTIVE or INVALID Workgroups		

- **Rule Element 3:** Indicates the Hourly ACA Yearly Limit in Hours used to generate exceptions for the 90% warning and hours exceeded error (annual limit can be overridden if allowed). For instructions on updating the Hourly ACA Yearly Limit, refer to the [Adjusting Hourly ACA Yearly Limit](#) section of this Job Aid

- **Rule Element 4:** Indicates the overtime limit or threshold for reporting overtime and rule validation for the eligibility of overtime
 - **Format:** NN:MMM
 - **NN** = FLSA Period Days (e.g., 07, 14, 21, 28)
 - **MMM** = the number of hours that should be worked before overtime should be reported

- **Rule Element 5:** Indicates the Compensatory and Overtime Leave Plan limits for maximum hours allowed in balance. This field is only used for employees/agencies using Cardinal Absence Management:
 - **Format:** AAA:BBB
 - **AAA** = Compensatory Leave Plan limit
 - **BBB** = Overtime Leave Plan limit

In addition, TL Eligibility enrollment impacts the employee's eligibility for Shift Differential, Commuter Imputed Income, and Overtime Leave.

Changes in Job Data and TL Eligibility, including position changes, new hires, terminations, and Agency transfers, are processed by the TL Auto Enrollment process. For example, terminated employees and employees with an inactive HR status will be assigned to an "Inactive" time reporting group to prevent Timesheets from being submitted or interfaced beyond the date the employee became inactive.

TL Bypass Auto Enroll Overview

Agencies can bypass the TL Auto Enroll process for an employee and maintain the employee's Time Reporter data and/or Comp Plans manually using the TL Bypass Auto Enroll feature. The TL Auto Enroll process checks the TL Bypass Auto Enroll selections to determine if the employee should be skipped from the default Time Reporter and/or Comp Plan enrollment processing. Generally, the TL Bypass feature should not be used unless the TL Auto Enroll process did not enroll the employee appropriately and there are no criteria that could be configured for the Agency to identify and enroll the employee as needed.

Any Time Reporter Data or Comp Plan enrollments that are manually updated, except for the few exceptions noted at the end of this section, require the employee to be set up for TL Bypass by the TL Setup Administrator to preserve the manual updates. Otherwise, the TL Auto Enrollment process will overwrite the manual changes with the default values based on state and Agency criteria. If an employee is set for bypass, all Time Reporter and/or Comp Plan values must be maintained manually for the employee. It is recommended to deactivate TL Bypass for employees when there is no longer a need for bypass or upon termination to ensure that the TL Auto Enrollment process does not bypass the employee if later rehired.

Use of the TL Bypass Auto Enroll feature should be rare. If it is being used frequently, the Agency should consider contacting PPS to review their Agency criteria. Ideally, Agency criteria can be added or modified to appropriately identify employees for default Time Reporter and Comp Plan enrollments.

The following TL Bypass fields are used in Cardinal:

- **Effective Date:** Indicates the date on which the TL Bypass becomes effective for the employee
- **Bypass Time Reporter Data:** Selection of this **Select** checkbox option is used to indicate that the TL Auto Enroll process will bypass Time Reporter enrollment (Workgroup, Taskgroup, and Rule Elements) for the employee. If selected, these data values will need to be manually updated and maintained by the TL Employee Setup Administrator, to include when updates are needed based on Job Data changes, for the employee

Bypass Comp Plan: Selection of this **Select** checkbox option is used to indicate that the TL Auto Enroll process will bypass Comp Plan enrollment for the employee. If selected, the Comp Plans will need to be manually updated and maintained by the TL Employee Setup Administrator, to include when updates are needed based on Job Data changes, for the employee. The following are examples of valid reasons to use the TL Bypass Auto Enroll feature for an employee:

- The Agency does not offer Compensatory Leave as a general business practice for their employees. However, an individual employee could be granted Compensatory Leave on a case by case basis. To do so, the employee would be set up with the TL Bypass Auto Enroll feature (Bypass Comp Plan selection) by the TL Setup Administrator and then the employee would be enrolled in the Compensatory Leave plan manually

- The Agency does not pay overtime to Salaried Exempt employees as a general business practice. However, an individual employee could be made eligible for paid overtime in certain emergency situations or other special circumstances. To do so, the employee would be set up with the TL Bypass Auto Enroll feature (Bypass Comp Plan selection) by the TL Setup Administrator and then the employee would be enrolled in the applicable paid overtime plan manually

Use of the TL Bypass Auto Enroll feature is not necessary in the following cases:

- When manual updates are required to the 4th character of the Workgroup. This value can be manually changed from “P” to “F” or from “F” to “P” to change between partial and full approval for the employee without using the TL Bypass Auto Enroll feature
- When manual updates are required to the 8th character of the Workgroup. This value can be manually changed from “E” to “P” to change an employee from an Exception Time Reporter to a Positive Time Reporter without using the TL Bypass Auto Enroll feature
- The Hourly ACA Yearly Limit in Hours value within the **Rule Element 3** field can be manually updated (to increase or decrease the default limit) for hourly employees without using the TL Bypass Auto Enroll feature

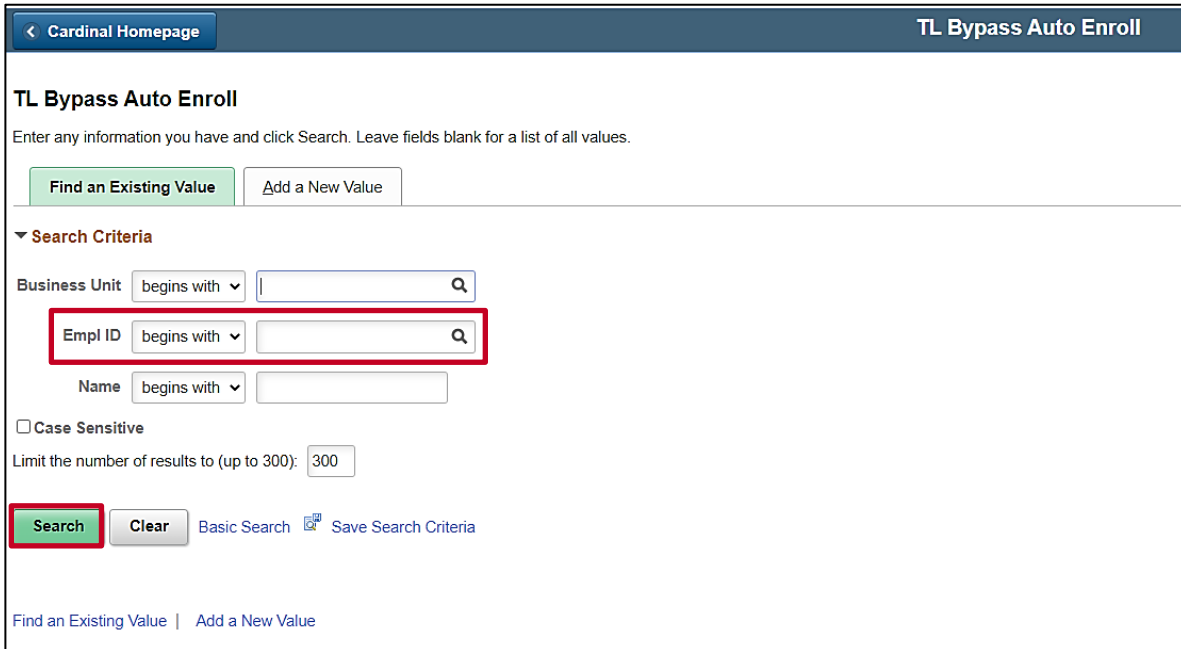
Maintaining TL Bypass Auto Enroll

1. Access the **TL Bypass Auto Enroll** page using the following path:

Menu > Time and Labor > Enroll Time Reporters > TL Bypass Auto Enroll

The **TL Bypass Auto Enroll Search** page displays.

Note: If you are updating existing TL Bypass Auto Enroll selections for an employee, proceed to Step 2. If you are setting up new TL Bypass Auto Enroll for an employee, proceed to Step 8.

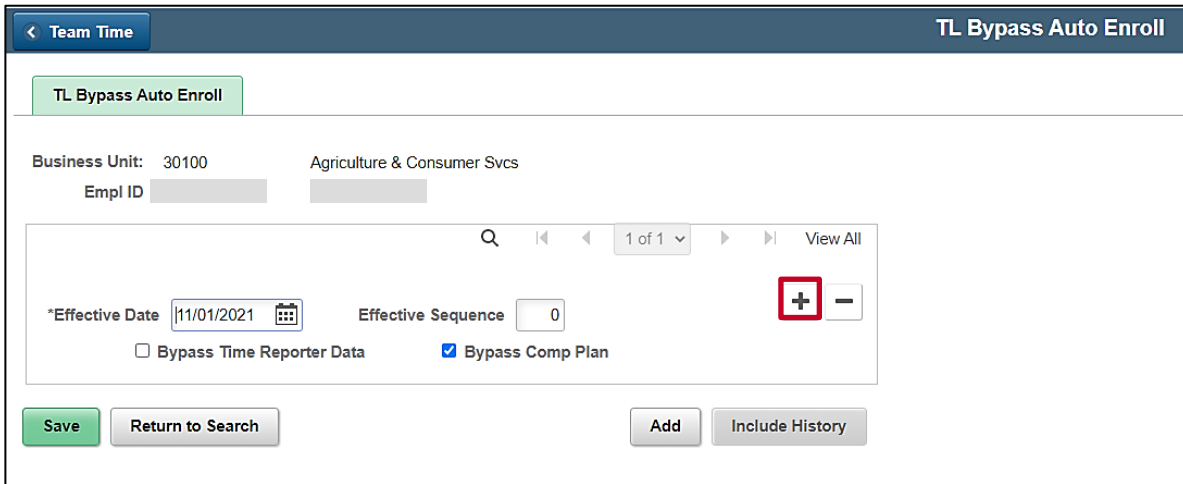


2. Enter the applicable employee's Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can search for an employee by name using the **Name** field. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

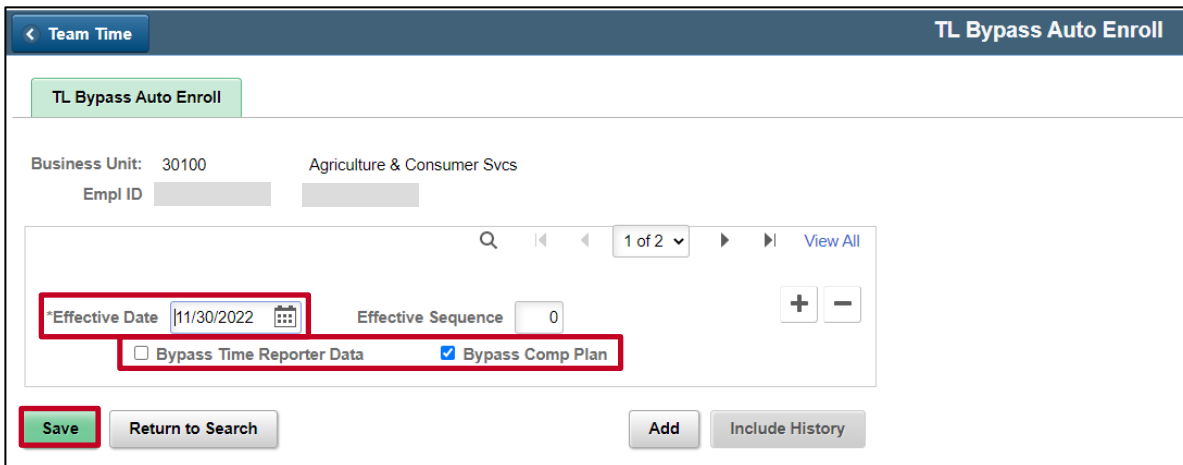
The **TL Bypass Auto Enroll** page displays for the applicable employee.



The screenshot shows the 'TL Bypass Auto Enroll' page. At the top, there is a navigation bar with a back arrow and 'Team Time' on the left, and 'TL Bypass Auto Enroll' on the right. Below this is a header section with 'TL Bypass Auto Enroll' in a green box. The main content area displays 'Business Unit: 30100 Agriculture & Consumer Svcs' and 'Empl ID' with two empty input fields. A search bar is present with a magnifying glass icon, navigation arrows, and '1 of 1' and 'View All' text. Below the search bar, there is a form with '*Effective Date' set to '11/01/2021' with a calendar icon, 'Effective Sequence' set to '0', and two checkboxes: 'Bypass Time Reporter Data' (unchecked) and 'Bypass Comp Plan' (checked). A red box highlights the '+ -' icons. At the bottom, there are buttons for 'Save', 'Return to Search', 'Add', and 'Include History'.

4. First, create a new effective dated row. Click the **Add a New Row** icon (+).

The page refreshes with a new effective date row.

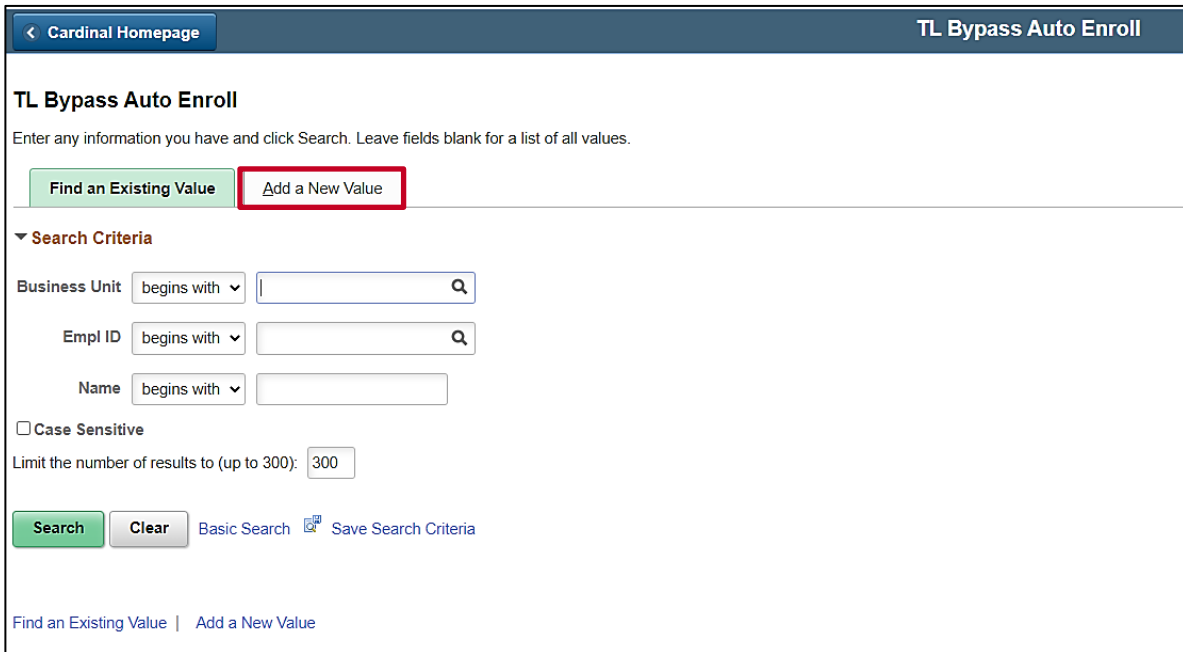


The screenshot shows the 'TL Bypass Auto Enroll' page after adding a new row. The navigation bar and header are the same. The 'Business Unit' and 'Empl ID' fields are the same. The search bar now shows '1 of 2' and 'View All'. The form now has two rows. The first row has '*Effective Date' set to '11/01/2021' with a calendar icon, 'Effective Sequence' set to '0', and 'Bypass Time Reporter Data' (unchecked) and 'Bypass Comp Plan' (checked). The second row has '*Effective Date' set to '11/30/2022' with a calendar icon, 'Effective Sequence' set to '0', and 'Bypass Time Reporter Data' (unchecked) and 'Bypass Comp Plan' (checked). A red box highlights the '+ -' icons. At the bottom, the 'Save' button is highlighted with a red box.

Note: The previous TL Bypass Auto Enroll selections are carried over into the new effective dated row.

5. The **Effective Date** field defaults to the current date. Update the date as needed using the **Effective Date Calendar** icon.
6. Update the TL Bypass Auto Enroll selections as needed by either selecting or de-selecting the **Bypass Time Reporter Data** option and/or **Bypass Comp Plan** checkbox options.
7. Click the **Save** button.

The process for updating the existing TL Bypass Auto Enroll selections for an employee is complete.



Cardinal Homepage TL Bypass Auto Enroll

TL Bypass Auto Enroll

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

▼ Search Criteria

Business Unit

Empl ID

Name

Case Sensitive

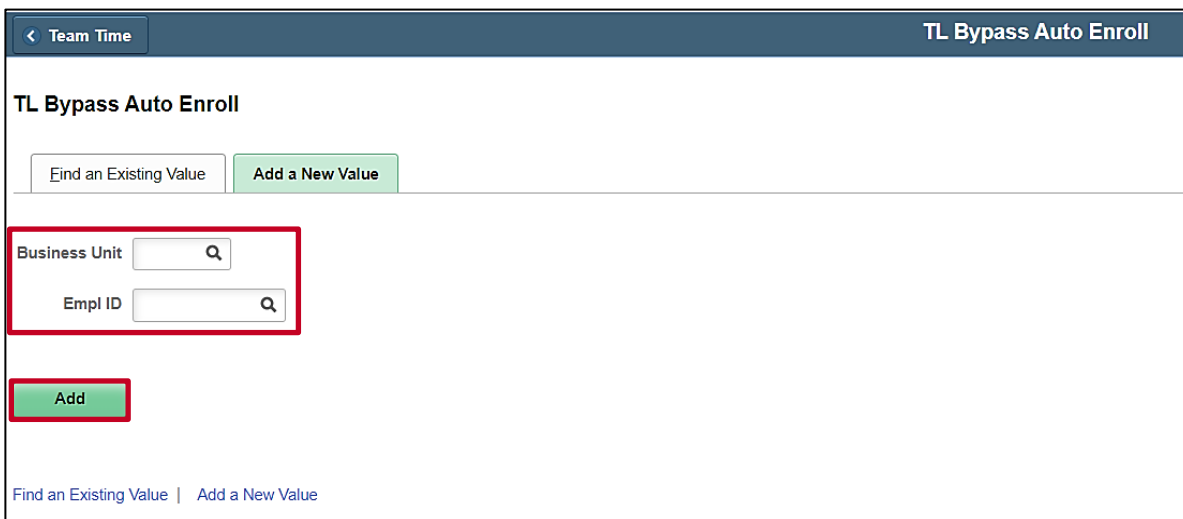
Limit the number of results to (up to 300):

[Basic Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

8. Click the **Add a New Value** tab.

The **Add a New Value** tab displays.



Team Time TL Bypass Auto Enroll

TL Bypass Auto Enroll

Business Unit
 Empl ID

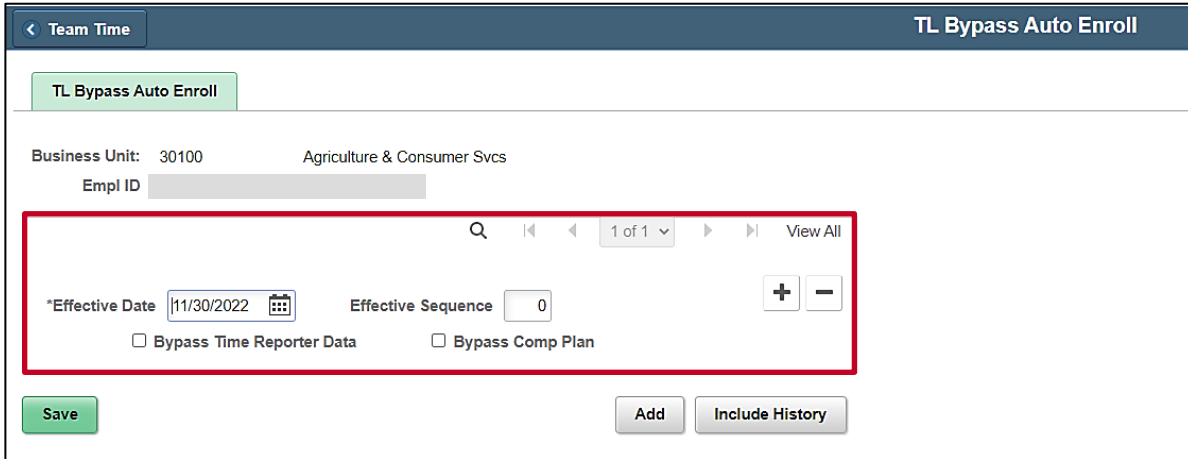
[Find an Existing Value](#) | [Add a New Value](#)

9. Enter or select your Agency's Business Unit in the **Business Unit** field.

10. Enter or select the applicable employee's Employee ID in the **Empl ID** field.

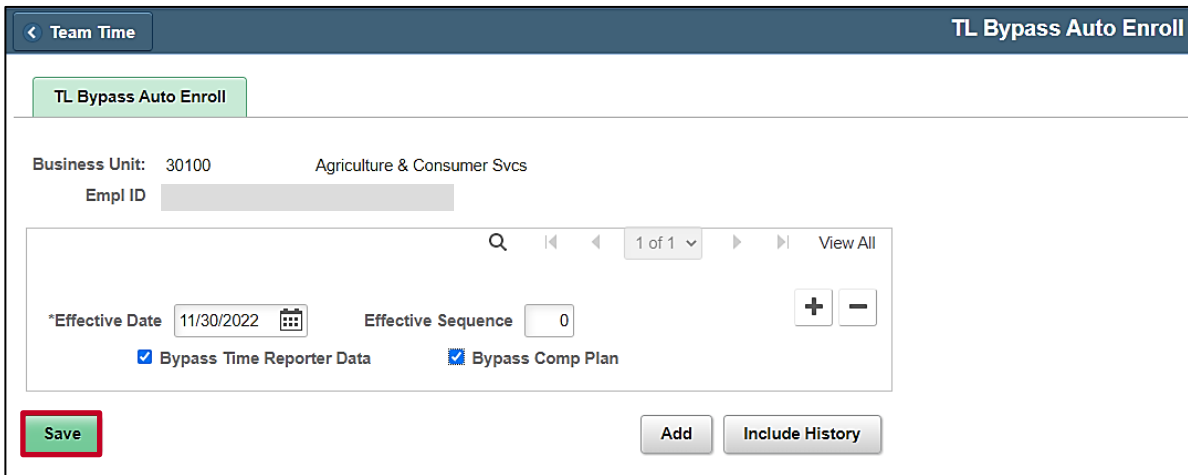
11. Click the **Add** button.

The **TL Bypass Auto Enroll** page displays for the applicable employee.



The screenshot shows the 'TL Bypass Auto Enroll' page. At the top, there is a navigation bar with a back arrow and 'Team Time' on the left, and 'TL Bypass Auto Enroll' on the right. Below this is a header with 'TL Bypass Auto Enroll'. The main content area shows 'Business Unit: 30100 Agriculture & Consumer Svcs' and 'Empl ID' with a greyed-out input field. A table-like area contains the following fields: '*Effective Date' with a date input '11/30/2022' and a calendar icon, 'Effective Sequence' with a numeric input '0', and two checkboxes: 'Bypass Time Reporter Data' (unchecked) and 'Bypass Comp Plan' (unchecked). There are '+', '-' buttons next to the Effective Date and Effective Sequence fields. At the bottom left is a green 'Save' button, and at the bottom right are 'Add' and 'Include History' buttons. A red box highlights the Effective Date, Effective Sequence, and the two checkboxes.

12. The **Effective Date** field defaults to the current date. Update this date as needed using the **Effective Date Calendar** icon.
13. Select the applicable TL Bypass Auto Enroll selections by selecting the **Bypass Time Reporter Data** checkbox and/or the **Bypass Comp Plan** checkbox options.



This screenshot is identical to the previous one, but the 'Bypass Time Reporter Data' and 'Bypass Comp Plan' checkboxes are now checked. Additionally, the green 'Save' button at the bottom left is highlighted with a red box.

14. Click the **Save** button.

The process for setting up the new TL Bypass Auto Enroll selections is complete.

To inactivate a TL Bypass Auto Enroll, add a new row with the needed Effective Date, uncheck the Auto Enroll you no longer want to be bypassed, and then click the **Save** button.

Maintaining Time Reporter Data

Any changes to these values that do not align with the employee's Job Data and agency criteria will be overwritten by the TL Auto Enrollment process.

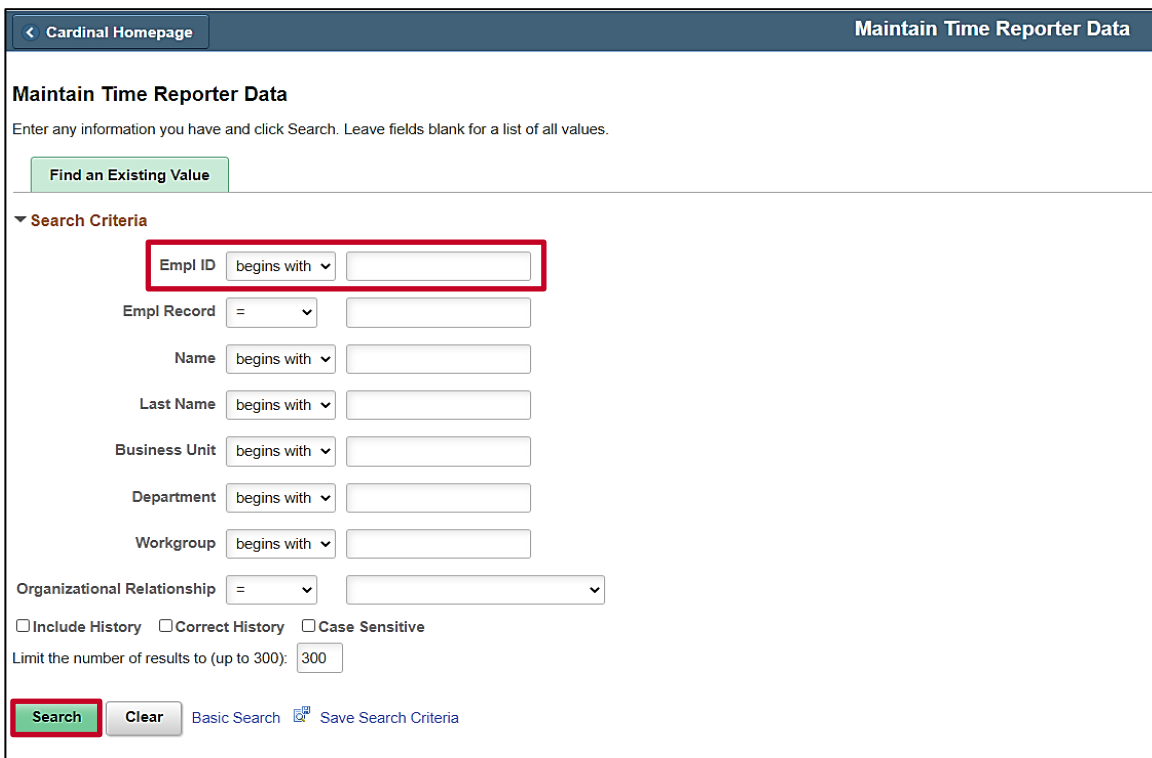
The following manual updates are not impacted by the TL Auto Enrollment process:

- The 4th character of the Workgroup can be manually changed from "P" to "F" or from "F" to "P" to change between partial and full approval for the employee
- The 8th character of the Workgroup can be manually changed from "E" to "P" to change an employee from an Exception Time Reporter to a Positive Time
- The Hourly ACA Yearly Limit in Hours value within the **Rule Element 3** field can be manually updated (to increase or decrease the default limit) for hourly employees

1. Access the **Maintain Time Reporter Data** page using the following path:

Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data

The **Maintain Time Reporter Data Search** page displays.

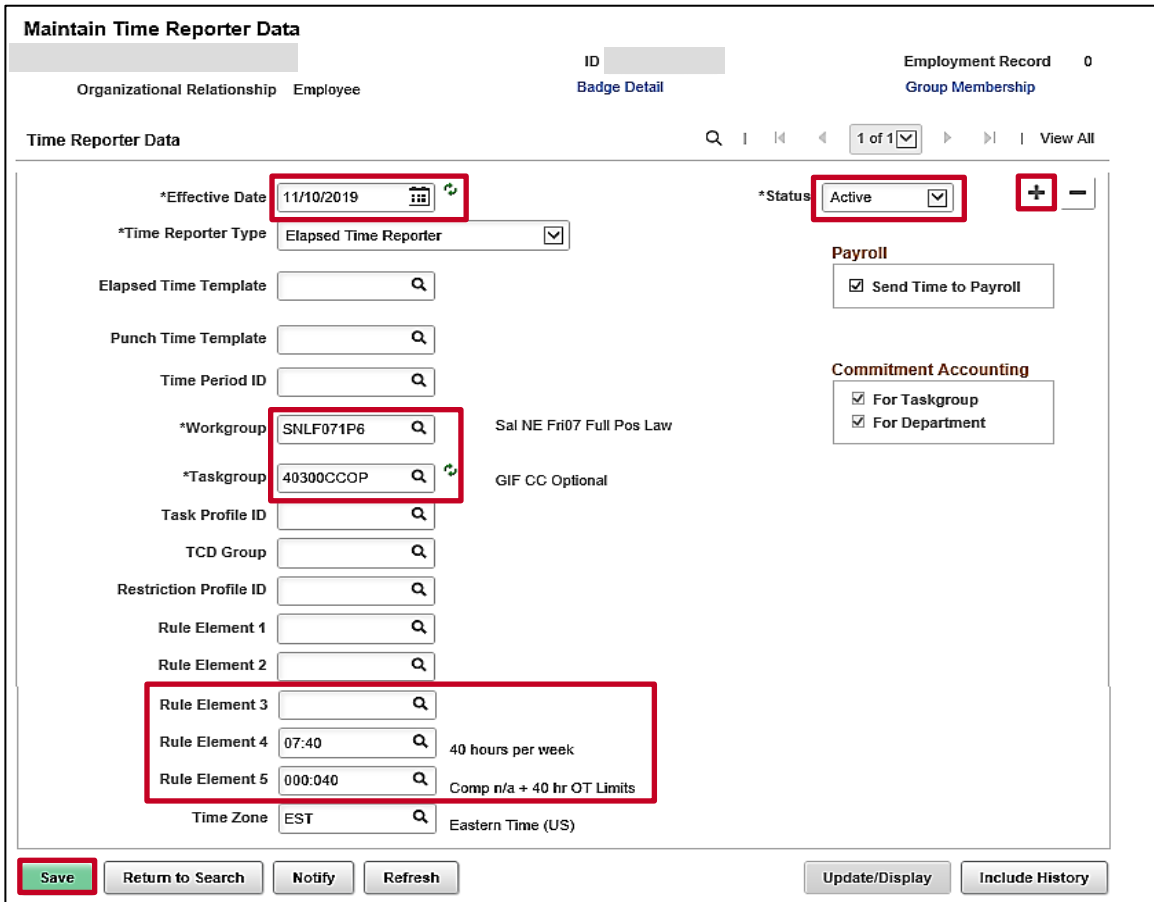


2. Enter the applicable employee's Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search for the employee by the 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 **Maintain Time Reporter Data** page displays for the applicable employee.



Maintain Time Reporter Data

ID [REDACTED] Employment Record 0

Organizational Relationship Employee Badge Detail Group Membership

Time Reporter Data 1 of 1 View All

*Effective Date 11/10/2019 *Status Active (+) (-)

*Time Reporter Type Elapsed Time Reporter

Elapsed Time Template [Search]

Punch Time Template [Search]

Time Period ID [Search]

*Workgroup SNLF071P6 Sal NE Fri07 Full Pos Law

*Taskgroup 40300CCOP GIF CC Optional

Task Profile ID [Search]

TCD Group [Search]

Restriction Profile ID [Search]

Rule Element 1 [Search]

Rule Element 2 [Search]

Rule Element 3 [Search]

Rule Element 4 07:40 40 hours per week

Rule Element 5 000:040 Comp n/a + 40 hr OT Limits

Time Zone EST Eastern Time (US)

Payroll Send Time to Payroll

Commitment Accounting For Taskgroup For Department

Save Return to Search Notify Refresh Update/Display Include History

4. Review the Time Reporter Data as needed. If updates are required, proceed to the next step.
5. Click the **Add a New Row** icon (+) to insert a new row.
6. Update the effective date to the date for the change to become effective using the **Effective Date Calendar** icon.
7. Update the **Status** field using the dropdown button as needed.
8. Select the applicable Workgroup using the **Workgroup Look Up** icon as needed.
9. Select the applicable Taskgroup using the **Taskgroup Look Up** icon as needed.
10. Update the **Rule Element** fields as needed using the corresponding **Look Up** icons.
11. Click the **Save** button once all required updates are made.

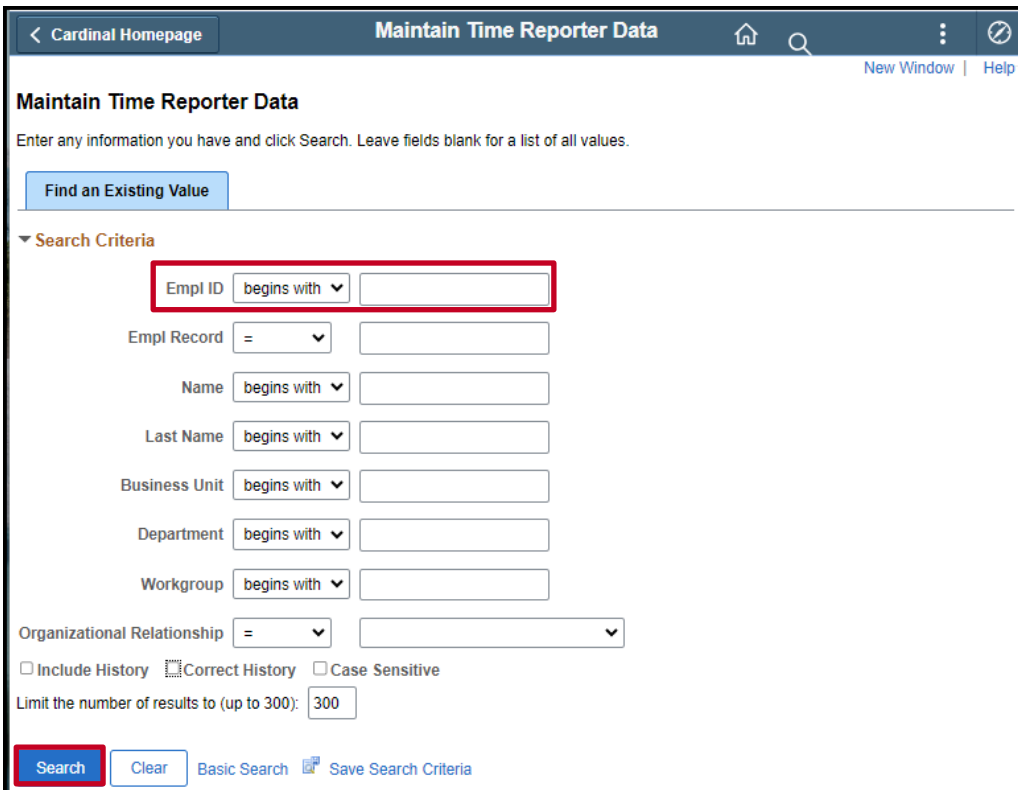
Adjusting Hourly ACA Yearly Limit

Rule Element 3 on Maintain Time Reporter Data defines the Yearly Limit for hourly employees. This value is initially populated for hourly employees by the TL Auto Enroll process based on defined agency Time Reporter criteria and is intentionally set to a value less than 1,500 by default to allow for sufficient warning. The default limit can be increased or decreased for individual employees. If the Yearly Limit is set below 1,500 hours, it can be adjusted up to 1,500 on the Maintain Time Reporter Data page by a TL Employee Setup Administrator by following the steps below.

1. Navigate to the **Maintain Time Reporter Data** page:

Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data

The **Maintain Time Reporter Data Search** page displays.

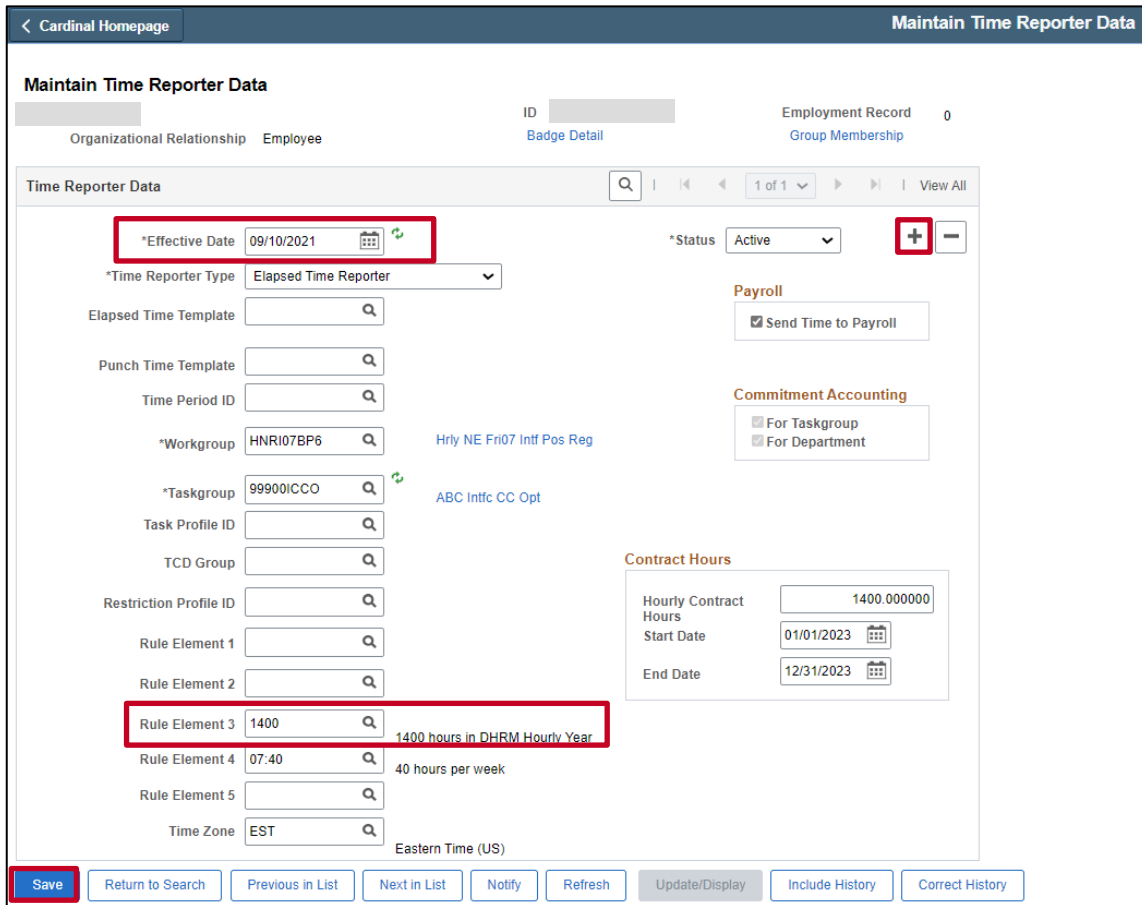


2. Enter the applicable employee's Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search for the employee by the 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 **Maintain Time Reporter Data Search** page displays:



The screenshot displays the 'Maintain Time Reporter Data' interface. At the top, there are navigation links for 'Cardinal Homepage' and 'Maintain Time Reporter Data'. Below this, there are tabs for 'Organizational Relationship', 'Employee', 'ID', 'Badge Detail', 'Employment Record', and 'Group Membership'. The main section is titled 'Time Reporter Data' and contains several input fields and sections:

- *Effective Date:** 09/10/2021 (highlighted with a red box)
- *Status:** Active (with a '+' button highlighted in a red box)
- *Time Reporter Type:** Elapsed Time Reporter
- Elapsed Time Template:** [Search]
- Punch Time Template:** [Search]
- Time Period ID:** [Search]
- *Workgroup:** HNRI07BP6 (Hrly NE Fri07 Intf Pos Reg)
- *Taskgroup:** 99900ICCO (ABC Intfc CC Opt)
- Task Profile ID:** [Search]
- TCD Group:** [Search]
- Restriction Profile ID:** [Search]
- Rule Element 1:** [Search]
- Rule Element 2:** [Search]
- Rule Element 3:** 1400 (1400 hours in DHRM Hourly Year) (highlighted with a red box)
- Rule Element 4:** 07:40 (40 hours per week)
- Rule Element 5:** [Search]
- Time Zone:** EST (Eastern Time (US))

Additional sections include:

- Payroll:** Send Time to Payroll
- Commitment Accounting:** For Taskgroup, For Department
- Contract Hours:** Hourly Contract Hours: 1400.000000, Start Date: 01/01/2023, End Date: 12/31/2023

At the bottom, there are buttons: Save (highlighted with a red box), Return to Search, Previous in List, Next in List, Notify, Refresh, Update/Display, Include History, and Correct History.

4. Click the **Add a Row** button (+) to add a new effective dated Row.

Note: The Effective Date will default to the system date. Be sure to update the Effective Date as needed. Cardinal recommends using the FLSA Period Begin Date as the Effective Date to avoid users receiving the Mid-Period Time Reporter message when entering their time. Submit a ticket to the PPS TA Team if a mass update is needed to adjust ACA Hours.

5. Update the **Rule Element 3** value as appropriate (up to 1500).
6. Click the **Save** button.



Maintaining Comp Plan Enrollment

Any changes to these values that do not align with the employee’s Job Data and agency criteria will be overwritten by the TL Auto Enrollment process.

Comp Plan enrollment controls the Time Reporting Codes (TRCs) available for reporting or interfacing on the employee’s Timesheet. Additionally, it controls the eligibility for TRCs that are translated or generated during Timesheet processing. TL Auto Enroll assigns effective dated Comp Plans on the **Compensatory Plan Enrollment** page.

The following **Time Reporter Data** fields are used in Cardinal:

- **Effective Date:** The date the Comp Plan enrollment is effective. This date should match the date of the Job Data or eligibility change that impacts time reporting (hire, termination, transfer, position change, etc.)
- **Compensatory Time Plan:** The Comp Plan that the employee is enrolled in that gives the employee access to specified TRCs. Some plans include access to multiple TRCs. The following table provides the TRCs available to be reported or interfaced on the Timesheet based on the Comp Plan that the employee is enroll in:

Comp Time Plan	TRCs available on Timesheet	TRC Descriptions
CARDINAL	HOLM, HNPM, HOS, CLO	Holiday, Holiday Pay Docking, Holiday Straight Extra, Office Closing
COMP_LEAVE	CALHE, CCA, CCD, CCL, CPO, ECHS, HCS, OCS, ONCHE	Comp Leave Earned, Comp Leave Taken, Comp Time Leave Payout, Comp Time Leave Adjust, Comp Time Leave Deduction, Comp Time Leave Adjust CNV, Holiday Straight Earned, for employees using Cardinal Absence Management
OT_LEAVE	CALHE, ECT, OCA, OCD, OCL, OCT, OPO	Overtime Leave Earned, Overtime Leave Taken, Overtime Leave Payout, Overtime Leave Adjust, Overtime Leave Deduction, Overtime Leave Adjust CNV, for employees using Cardinal Absence Management
PAID-OVD	OVD	OT @ Double Time
PAID-OVS	OVS	OT @ Straight Time
PAID-OVT	OVT	OT @ Time and Half
PAID-EOS	EOS	Emerg OT @ Straight Time
PAID-EOT	EOT	Paid Emerg OT @ Time and Half
PAID-CALHP	CALHP	Called Out Hours (Paid)
PAID-ONCHP	ONCHP	On-Call Hours (Paid)
PAID-ONCHX	ONCHX	On-Call Hours (Paid @ Time and Half)



Time & Attendance Job Aid

TA372_TL Setup Overview

Comp Time Plan	TRCs available on Timesheet	TRC Descriptions
PAID-SWP	SWP	SelEnfor/WrkZon/PrivDty (Paid @ Time and Half)
NONPROD_PD	ADMR, ALIR, BMOR, CCLR, CLOR, CSLR, DLRR, DSKR, DSSR, ELPR, ELWR, EMSR, ERLR, FCSR, FSKR, FVCR, LTDR, MBLR, MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, VACR, WRIR, ALIR, BMOR, CCLR, CLOR, CSLR, DLRR, DSKR, DSRR, ELPR, ELWR, EMSR, ERLR, FCSR, FSKR, FVCR, LTDR, MBLR, MILR, MIPR, MLDR, OCLR, PD1R, PD2R, PERR, PHER, PLLR, SCKR, SDPR, WCIR	Not required non-productive leave codes for employees using External Leave system
NONPROD_RQ	HCSR, HNPR, HOLR, HOSR, LNPR, STDR, STLR, WCLR, WCPR, WCSR	Required non-productive leave codes for employees using External Leave system
EARNOT-ONC	ONCHR	On-Call Hours (Earn) for employees using External Leave system
EARNAM-ONC	ONCHE	On-Call Hours (Earn) for employees using Cardinal Absence Management
EARNOT-CAL	CALHR	Called Out Hours (Earn) for employees using External Leave system
EARNAM-CAL	CALHE	Called Out Hours (Earn) for employees using Cardinal Absence Management
EARNOT-ECS	ECSR	Emergency Comp Earn for employees using External Leave system
EARNAM-ECS	ECS	Emergency Comp Earn for employees using Cardinal Absence Management
EARNOT-OCS	OCSR	Comp Leave Earned for employees using External Leave system
EARNOT-OCT	OCTR	Overtime Leave Earned for employees using External Leave system
EARNOT-ECT	ECTR	Emergency OT Leave Earned for employees using External Leave system



Comp Time Plan	TRCs available on Timesheet	TRC Descriptions
EARNAM-ECT	ECT	Emergency OT Leave Earned for employees using Cardinal Absence Management
AMNT-ONC\$\$		On-Call Amount
AMNT-CAL\$\$		Called Out Amount
AMNT-DIF\$\$		Weekend/Holiday Diff Amount
AMNT-MED\$\$		Medication Amount

Note: Some TRCs can only be accessed by TL Administrators on the **Timesheet** page.

The amount Comp Plans (indicated by \$\$) should not be assigned unless the agency is interfacing and is already approved to use them.

- **Status:** Indicates if the employee is enrolled in the Comp Plan:
 - **A:** Active (employee is enrolled in the Comp Plan and is eligible for TRCs associated with the Comp Plan)
 - **I:** Inactive (employee no longer has access to the TRCs associated with the Comp Plan)

The following state default Comp Plan enrollments are assigned to employees by category.

Employees whose Agency uses Cardinal as the leave system of record:

- **CARDINAL:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Office Closure (CLO)
 - Holiday related (HOLM, HNPM, HOS, HCS)

Note: This should never be overridden at the Agency level.

- **COMP_LEAVE:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Comp Leave Earned (OCS)
 - Comp Leave Taken (CCL)
 - Holiday Comp (HCS)
 - *Comp Leave Payout (CPO)
 - *Comp Leave Adjust (CCA)

Note: This can be overridden at the Agency level. This plan also tracks the Leave Balance.

- **OT_LEAVE:** All Salaried Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Overtime Leave Earned (OCT) and Overtime Leave Taken (OCL)
 - Overtime Leave Payout (OPO)
 - Overtime Leave Adjust (OCA)

Note: This can be overridden at the Agency level to be either no access or use Overtime Leave Eligibility to selectively grant access to employees. If an Agency does not payout Overtime Leave balances at the time a Salaried employee transfers from Non-Exempt to Exempt, state default keeps OT_LEAVE enrollment (to use the remaining leave balance only) based on the employee specific Overtime Leave Eligibility. This plan also tracks the Leave Balance.

Employees whose Agency uses an external leave system of record:

- **NONPROD_RQ:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRCs:
 - Holiday related (HOLR, HNPR, HOSR, HCSR)
 - Pay Docking (LNPR)
 - Short Term Disability (STDR, STLR)
 - Workers Compensation (WCLR, WCPR, WCSR)

Note: This should never be overridden at the Agency level.

NONPROD_PD: All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to most of the other Reported Time TRCs for Leave Taken (for example VAGR, SCKR, CCLR, OCLR).

Note: Agencies that have Non-Exempt employees and pay OT with FLSA impacting earnings cannot override for their nonexempt employees.

- **EARNOT-OCS:** All Salaried Exempt and Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRC:

- Comp Leave Earned (OCSR)

Note: This can be overridden at the Agency level.

- **EARNOT-OCT:** All Salaried Non-Exempt employees that are paid on a semi-monthly basis are enrolled by default. This gives access to the following Reported Time TRC:

- Overtime Leave Earned (OCTR)

Note: This can be overridden at the Agency level.

Employees with Paid Overtime:

- **PAID-OVS:** Hourly Exempt and Salaried Non-Exempt employees with the ability to report paid straight time overtime are enrolled by default. This gives access to the following Reported Time TRC:

- OT @ Straight Time (OVS)

Note: This can be overridden at the Agency level.

- **PAID-OVT:** Hourly Non-Exempt and Salaried Non-Exempt employees with the ability to report paid time and half overtime are enrolled by default. This gives access to the following Reported Time TRC:

- OT @ Time and Half (OVT)

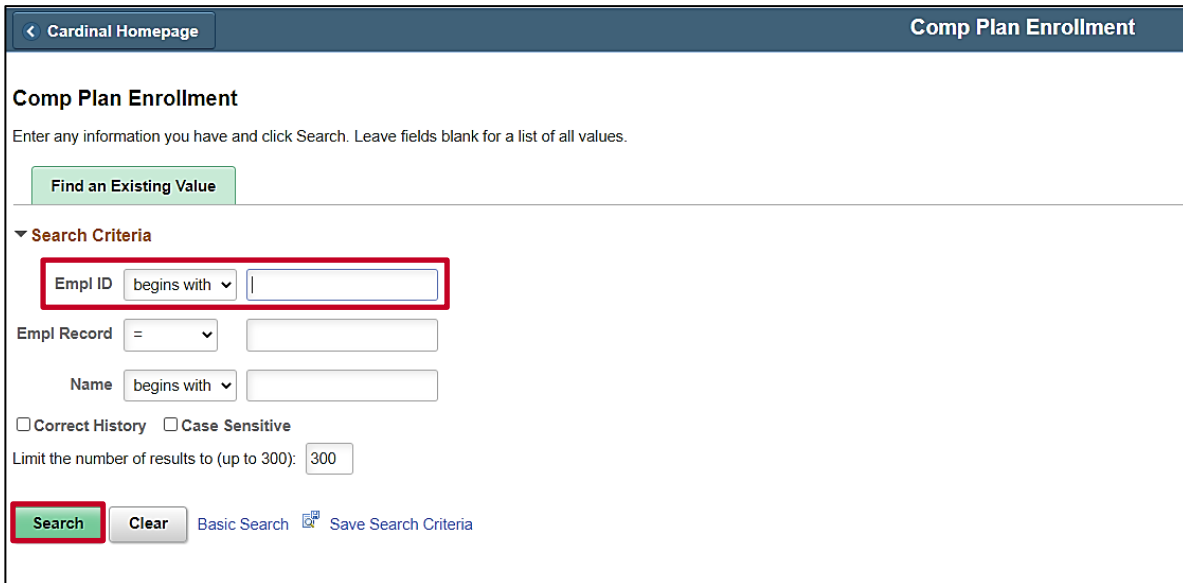
Note: This can be overridden at the Agency level.

Accessing, Reviewing, and Updating Compensatory Plan Enrollments

1. Access the **Compensatory Plan Enrollment** page using the following path:

Menu > Time and Labor > Enroll Time Reporters > Comp Plan Enrollment

The **Comp Plan Enrollment Search** page displays.



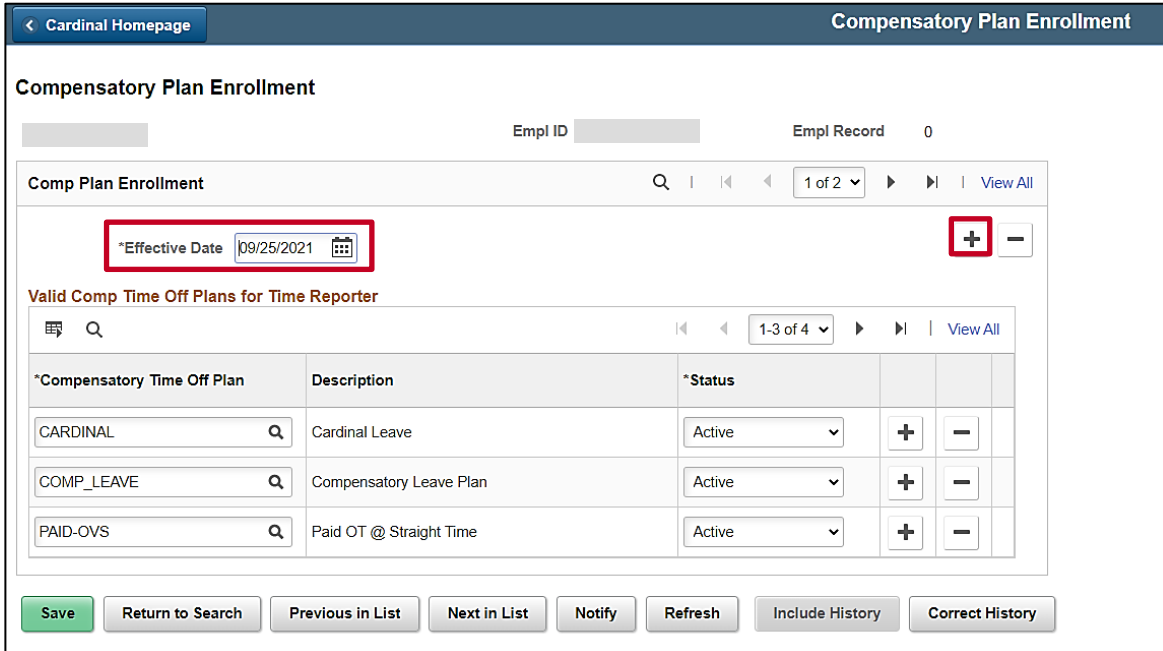
The screenshot shows the 'Comp Plan Enrollment' search interface. At the top, there is a navigation bar with a back arrow and 'Cardinal Homepage' on the left, and 'Comp Plan Enrollment' on the right. Below the navigation bar, the title 'Comp Plan Enrollment' is displayed, followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A green button labeled 'Find an Existing Value' is positioned below the instruction. Underneath, a section titled 'Search Criteria' is expanded. It contains three search fields: 'Empl ID' with a dropdown menu set to 'begins with' and an empty input field; 'Empl Record' with an equals sign dropdown and an empty input field; and 'Name' with a dropdown menu set to 'begins with' and an empty input field. Below these fields are two checkboxes: 'Correct History' and 'Case Sensitive'. A text input field for 'Limit the number of results to (up to 300):' is set to '300'. At the bottom, there is a green 'Search' button, a grey 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

2. Enter the applicable employee's Employee ID or known portion of the Employee ID in the **Empl ID** field.

Note: You can also search for the employee by the 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 **Compensatory Plan Enrollment** page displays for the applicable employee.



Cardinal Homepage Compensatory Plan Enrollment

Compensatory Plan Enrollment

Empl ID Empl Record 0

Comp Plan Enrollment 1 of 2 | View All

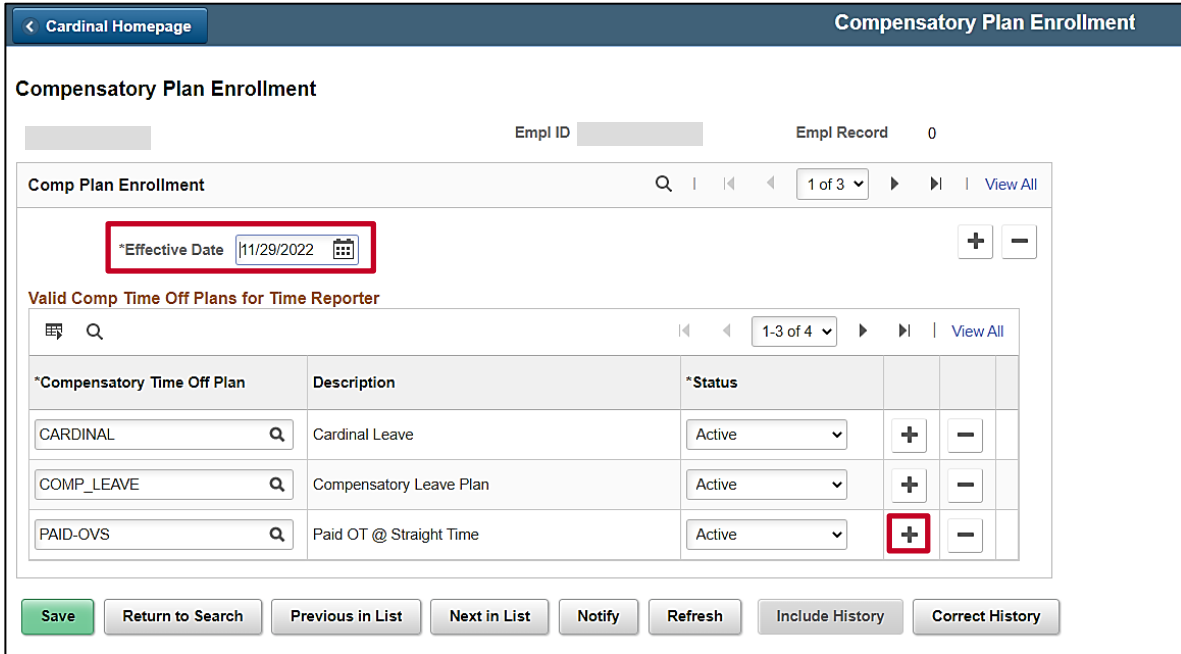
*Effective Date + -

Valid Comp Time Off Plans for Time Reporter 1-3 of 4 | View All

*Compensatory Time Off Plan	Description	*Status		
<input type="text" value="CARDINAL"/>	Cardinal Leave	Active	+	-
<input type="text" value="COMP_LEAVE"/>	Compensatory Leave Plan	Active	+	-
<input type="text" value="PAID-OVS"/>	Paid OT @ Straight Time	Active	+	-

- First, create a new effective dated row. Click the **Add a New Row** icon (+) located to the right of the **Effective Date** field within the **Comp Plan Enrollment** section.

The page refreshes with a new effective date row.



Cardinal Homepage Compensatory Plan Enrollment

Compensatory Plan Enrollment

Empl ID [redacted] Empl Record 0

Comp Plan Enrollment 1 of 3 | View All

*Effective Date 11/29/2022 + -

Valid Comp Time Off Plans for Time Reporter

*Compensatory Time Off Plan	Description	*Status		
CARDINAL	Cardinal Leave	Active	+	-
COMP_LEAVE	Compensatory Leave Plan	Active	+	-
PAID-OVS	Paid OT @ Straight Time	Active	+	-

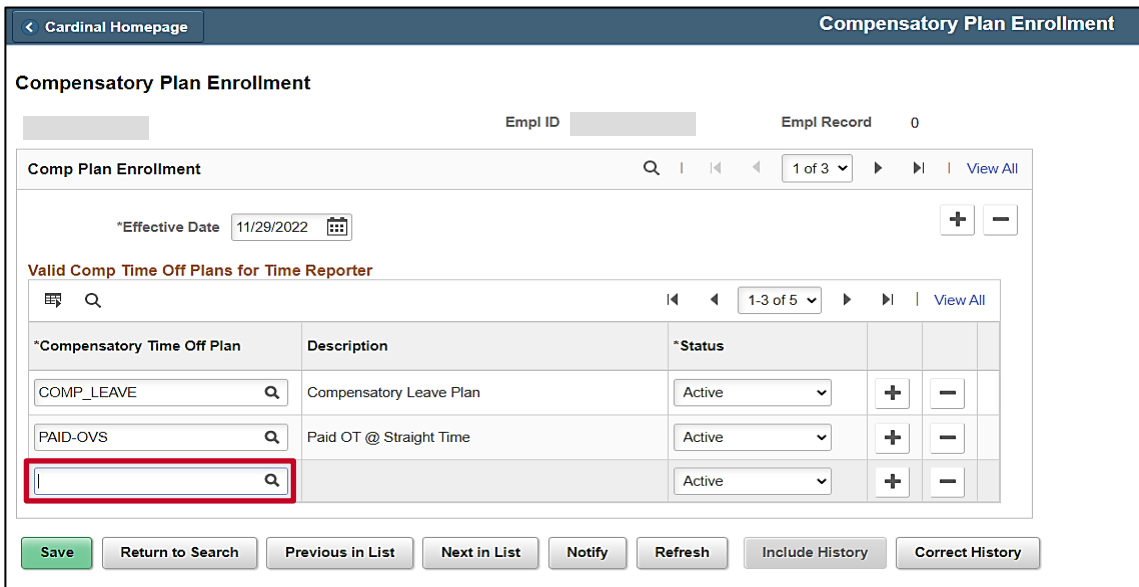
Save Return to Search Previous in List Next in List Notify Refresh Include History Correct History

Note: The Effective Date defaults to the current date. Update as needed using the **Effective Date Calendar** icon.

If you need to inactivate a Comp Plan for the employee, update the corresponding **Status** field to "Inactive" using the dropdown button and then proceed to Step 8. If you need to add an additional Comp Plan(s) for the employee, proceed to Step 5.

5. Click any of the **Add a New Row** icon (+) within the Valid Comp Time Off Plans for **Time Reporter** section.

The page refreshes and a new row displays within the **Valid Comp Time Plans for Time Reporter** section.



Cardinal Homepage Compensatory Plan Enrollment

Compensatory Plan Enrollment

Empl ID Empl Record 0

Comp Plan Enrollment 1 of 3 | View All

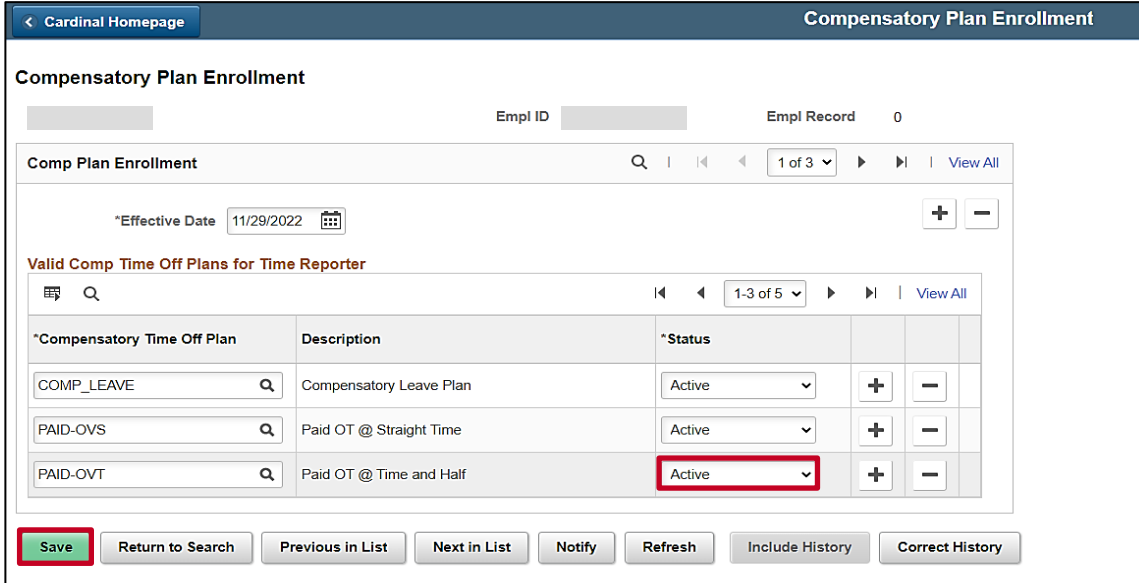
*Effective Date 11/29/2022 + -

Valid Comp Time Off Plans for Time Reporter

*Compensatory Time Off Plan	Description	*Status		
COMP_LEAVE	Compensatory Leave Plan	Active	+	-
PAID-OVS	Paid OT @ Straight Time	Active	+	-
		Active	+	-

Save Return to Search Previous in List Next in List Notify Refresh Include History Correct History

- Select the applicable Comp Plan using the **Compensatory Time Off Plan Look Up** icon. The page refreshes with the selected **Comp Plan**.



Cardinal Homepage Compensatory Plan Enrollment

Compensatory Plan Enrollment

Empl ID Empl Record 0

Comp Plan Enrollment 1 of 3 | View All

*Effective Date 11/29/2022 + -

Valid Comp Time Off Plans for Time Reporter

*Compensatory Time Off Plan	Description	*Status		
COMP_LEAVE	Compensatory Leave Plan	Active	+	-
PAID-OVS	Paid OT @ Straight Time	Active	+	-
PAID-OVT	Paid OT @ Time and Half	Active	+	-

Save

 Return to Search Previous in List Next in List Notify Refresh Include History Correct History

- To add additional Comp Plans, repeat Steps 5-8.
- Once complete, click the **Save** button.

Work Schedules Overview

General Information:

The Time & Labor Administrator should monitor employee Work Schedules to ensure all employees have a Work Schedule assigned. The Employee Schedule Review Query V_TA_SCHEDULE_REVIEW provides a list of time reporters that require an update to their Work Schedule. For further information about this query, see the Cardinal HCM Time and Attendance Reports Catalog. This Report Catalog is located on the Cardinal Website in **Reports Catalogs** under **Resources**.

Each employee must have an assigned Work Schedule in Cardinal. Work Schedules are assigned to employees by either the TL Employee Setup Administrator, the TL Administrator, or the employee's TL Supervisor. Timekeepers can only view employee Work Schedules.

Types of Work Schedules:

Hourly – This is a schedule with zero pre-defined hours. Hourly employees must report all hours in order to be paid.

Set Schedule – This is a non-flexible schedule with predictable days and hours. A set Work Schedule could also include a rotating pattern.

Variable Schedule – This is a flexible schedule that is set up in the system as 24 hours a day, 7 days a week. This type of schedule requires an employee to report all hours.

Users with the following TA Roles have the ability to view employee Work Schedules:

- Timekeepers
- TL Administrators
- TL Employee Setup Administrators
- TL Supervisors

Users with the following TA Roles have the ability to assign and maintain employee Work Schedules:

- TL Administrators
- TL Employee Setup Administrators
- TL Supervisors



Work Schedule Naming Convention:

Below are some examples of how Schedule ID's are named:

SETID = STATE, 7-Day

Format: NN.NN-AAAAAAA-B, Example: 40.00-Z88888Z-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7-day indicator – first character is Day 1, second character is Day 2, etc.	0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

SETID = STATE, 9X80

Format: 9X80-AAAAAAA-B, Example: 9X80-Z9998ZZ-0

Character	Defines	Value
AAAAAAA	7-day indicator – first character is Day 1, the second character is Day 2, etc.	0-9, A-X: for example Z – Off Day 0 – If the hours for the day are between 0.01 and 0.99 1 – If the hours for the day are between 1.00 and 1.99 A – If the hours for the day are between 10.00 and 10.99 B – If the hours for the day are between 11.00 and 11.99 X – If the hours for the day are 24.00
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

- 9X80 schedules must not be assigned to Non-Exempt employees
- Day 1 in the 14 day schedule will correspond to a Biweekly Pay Period Begin Date in Cardinal – used by Hourly employees

- SETID = <Business Unit>
- Format: NN.NN-AAAAAAA-B, Example: 40.00-5X8X3WK-0

Character	Defines	Value
NN.NN	Schedule Hours for the week	Example: 40.00, 37.5
AAAAAAA	7-day indicator – first character is Day 1, the second character is Day 2, etc.	Example: 4X10+5X8 – Week 1 is a 4 day/10-hour work week, and Week 2 is a 5 day/8-hour work week. 4X10X2WK - Week 1 is a 4 day/10-hour work week, and Week 2 is also a 4 day/10-hour work week, however the workdays are not the same for each week. 4X10+OTH – Week 1 is a 4/day/10-hour work week, and Week 2 is some other type of work week that is not 5X8 or 4x10.
B	Indicates a unique schedule	0-9, A-Z – to indicate a unique schedule

For detailed information and step-by-step instructions on how to maintain employee Work Schedules, refer to one of the following:

Job Aid: **TA: Maintaining Employee Work Schedules**

- This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
- Tutorial Video: **Manually Assigning Work Schedules**

Note: Access this Tutorial Video on the Cardinal Website using the following path:

Learning > Videos (HCM) > Time & Attendance Tutorials for Core Users