Extended Leave Processing Overview

This Job Aid will provide Payroll Administrators with guidance regarding the entry of extended leave in SPOT. When an employee goes on extended leave, there are activities that are performed by HR Administrators, TL/Absence Administrators, and Payroll Administrators.

This Job Aid will focus on what Payroll Administrators will need to enter into SPOT for extended leave for Short Term Disability (STD) and Worker's Compensation (WC) in Cardinal.

The STD Effective Date should always be the first day of the STD coverage, not the first day of the waiting period.

Note: The following earnings codes cannot be entered as a separate check using the begin and end date within the current period or it will cause an error. They are as follows:
LSH – Leave Share
STD – Short Term Disability
WCL – VSDP Work Comp Pay
WCP – Workers Comp
WCS – Work Comp Supplement

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.

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Short Term Disability (STD)

When an employee goes out on STD the following actions need to occur:

Human Resources

- Navigate to Job Data. Insert a new effective data row
    - **Action**: Paid Leave of Absence
    - **Reason**: Short Term Disability
    - Enter the employee's **Expected Return Date**
    - Change the **Turn Off Auto Pay** field to **Yes**
    - On the **Payroll** tab change the employee's **Holiday Schedule** to **HOLSTD**

Time & Attendance

- Employee Setup Administrator updates the schedule to a 5 x 8 (Monday – Friday), if necessary. The effective date of the schedule change should be the first day of the FLSA period during which the STD begins.
- Absence Administrator:
    - Enter the STD on the employee's timesheet. Absence Administrators should request the VSDP Calculation Spreadsheet from Payroll to identify the number of hours of STD/Supplement to be entered.
    - If the employee is using leave to cover time not covered by STD (once it drops to 80% or 60%), enter the absence hours on the timesheet (VAC, SCK, PER)
    - If employee is not supplementing with leave enter those hours using the TRC of STL – this allows the employee accruals to continue

Payroll

Payroll Administrators will review the HR effective date for when the employee went out on leave, Timesheet information, and employee compensation. The Payroll Administrator will then enter the appropriate transactions in SPOT for the employee to be paid accurately.

Note: When the **Turn Off Auto Pay** field is changed to **Yes**, payments will not be made (salary or additional pays) unless SPOT transactions have been entered for the employee.

If the leave start day occurs in the middle of a pay period, the salary pay and additional pay will be turned off the entire pay period by the Pay Calculation process. Updating the **Turn Off Auto Pay** field to **Yes** in the middle of the pay period will not prorate the employee's pay, which will need adjusting through SPOT. Please work with your agency HR Administrator to validate information to ensure accurate employee pay.

1. Navigate to the **Job Data** page using the following path:

    Navigator > Workforce Administration > Job Information > Job Data

    The **Job Data Search** page displays.

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.
3. Click the **Search** button.

The **Work Location** tab displays.

4. Verify the following:

    a. **Effective Date**: This should be the appropriate leave date for the employee

    b. **Action**: Paid Leave of Absence

    c. **Reason**: Short-Term Disability

    d. **Turn Off Auto Pay**: Yes

    e. **Expected Return Date**: This should be populated with the employee's expected return date from the STD

    f. **STD Claim #**: populated

5. Click the **Payroll** tab.

6. Verify the **Holiday Schedule** is **HOLSTD.** All other fields remain unchanged.

7. Click the **Compensation** tab.

8. Make note of the compensation rate for the employee.

9. Enter the appropriate information into the VSDP **Calculation Spreadsheet** located on the DOA website.

10. Navigate to the **Enter SPOT Transactions** page using the following path:

Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions

The **Enter SPOT Transactions Search** page displays.

Enter SPOT Transactions

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

Company	begins with ˅	[ ] 🔍
Pay Group	begins with ˅	[ ] 🔍
Pay Period End Date	= ˅	[ ] 🔍
Transaction Type	= ˅	[ ] ˅
Batch Identity	begins with ˅	[ ]
Batch Status	= ˅	[ ] ˅
Created By	begins with ˅	[ ] 🔍

☐ Case Sensitive

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

[Search] [Clear]   Basic Search 🔗 Save Search Criteria

Find an Existing Value | Add a New Value

11. Click the **Add a New Value** tab.
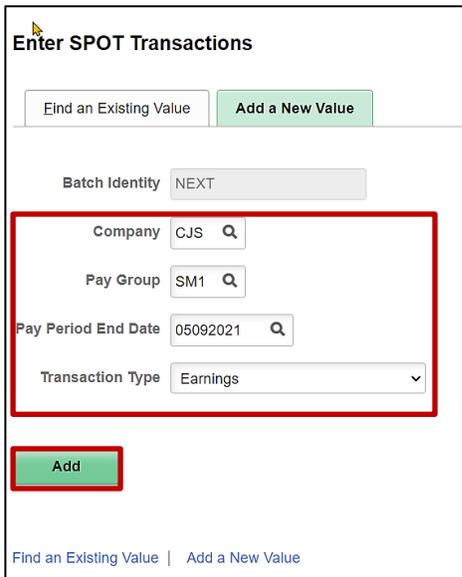
Enter SPOT Transactions

Find an Existing Value	**Add a New Value**

Batch Identity   NEXT

Company   CJS 🔍

Pay Group   SM1 🔍

Pay Period End Date   04242021 🔍

Transaction Type   Earnings ▾

Add

Find an Existing Value | Add a New Value

12. Enter or select the following:

    a.   **Company**

    b.   **Pay Group**

        Note: Enter the Pay Group that the employee is in for the payroll being processed.

        Pay Period End Date

    c.   **Transaction Type**: **Earnings**

13. Click the **Add** button.

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods
1	💬	1	[___] 🔍	0 🔍		Active	STD 🔍	VSDP Benefits	04/10/2021 📅	04/24/2021 📅	1

...ds	Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #		
	Annualized ▼			2083.33	Deduction		Deduction		0	+	−

14. Enter the following:

    a. **Employee ID**

    b. **Empl Rcd:** Defaults to **0**. Update if necessary.

    c. **Earn Code: STD**

    d. **Earns Begin Dt:** Enter the first day of the current pay period (4/10).

    e. **Earns End Dt:** Enter the last day of the current pay period (4/24).

    f.   **Amount**: Enter the amount from the VSDP **Calculation Spreadsheet** worksheet

15. Validate and submit the transaction for approval.

Review Paycheck Page

In the Other Earnings section of the **Review Paycheck** page, you are able to see the STD for the entire period, which was entered and loaded from SPOT. This will be available after the SPOT load and Pay Calculation processes have been run by the SPO team.

Note: (**Source** code of **OP** = SPOT)

STD – Returning from STD

When an employee returns from STD, the following actions need to occur:

Human Resources

- Navigate to Job Data in Cardinal. Insert a new effective dated row:
    - **Effective Date**: Date the employee returned to work
    - **Action**: Return from Leave
    - **Reason**: Return from Leave
    - **Turn Off Auto Pay**: Select No
    - **STD Claim #**: Delete the STD Claim #
    - On the **Payroll** tab change the employee's **Holiday Schedule** back to **HOLSAL**

Time & Attendance

- Employee Setup Administrator updates the schedule to a 5x8 (Monday – Friday) if necessary. The effective date of the schedule change should be the first day of the FLSA period during which the STD begins.
- The regular productive or non-productive time should be entered for the days after the STD ends.
- Absence Administrator:
    - Enter the STD on the employee's timesheet
    - If the employee is using leave cover time not covered by STD (once it drops to 80% or 60%), enter the absence hours on the timesheet (VAC, SCK, PER)
    - If employee is not supplementing with leave enter STL – this allows the employee accruals to continue

Payroll

- Payroll Administrators will review HR and Timesheet information, employee compensation and enter the appropriate transactions in SPOT for the employee to be paid accurately. See the steps outlined in the section below:

1. Navigate to the **Job Data** page using the following path:

    Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee Id in the **Empl ID** field.

3. Click the **Search** button.

The **Work Location** tab displays.

4. Verify the following:

    a. **Effective Date**: Date the employee returned from leave

    b. **Action**: Return from leave

    c. **Reason**: Return from Leave

    d. **Turn Off Auto Pay**: No

        Note: Changing the **Turn Off Auto Pay** field to **No** in the middle of the pay period will not prorate the employee's pay. It will automatically process the employee's salary and additional pays for the <u>entire</u> pay period. SPOT transactions will need to be entered to reduce the employee's pay for the portion of the pay period the employee was on leave.

    e. **STD Claim #**: Delete the STD Claim #

5. Click the **Payroll** tab.

6. Verify the **Holiday Schedule** is **HOLSAL.**

7. Click the **Compensation** tab.

8. Make note of the compensation rate for the employee.

9. Enter the appropriate information into the VSDP **Calculation Spreadsheet** located on the DOA website.

10. Navigate to the **Enter SPOT Transactions** page using the following path:

    Navigator > Payroll for North America > Payroll Processing USA > Create and Load Paysheets > Enter SPOT Transactions

The **Enter SPOT Transactions Search** page displays.

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

12. Enter or select the following:

    a.   Company

    b.   **Pay Group**:

    c.   Pay Period End Date

    d.   **Transaction Type**: Earnings

13. Click the **Add** button.

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Period
1	💬	1	🔍	0 🔍		Active	RGS 🔍	Regular Time - Salaried	05/05/2021 📅	05/09/2021 📅	1
2	💬	2	🔍	0 🔍		Active	STD 🔍	VSDP Benefits	04/25/2021 📅	05/04/2021 📅	1

1-2 of 2 | View All

Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #		
1	Annualized	1	625.00		Deduction		Deduction		0	➕	➖
1	Annualized			1458.33	Deduction		Deduction		0	➕	➖

14. Enter the following:

   a. **Employee ID**

   b. **Empl Rcd**: Defaults to **0**. Update if necessary

   c. **Earn Code**: RGS

   d. **Earns Begin Dt:** Enter the date the employee returned from STD (5/5)

   e. **Earns End Dt:** Enter the end date of the current pay period (5/9).

   f. **Oth Hrs**: 1

   g. **Hourly Rate**: Amount from VSDP Calculation Spreadsheet for regular hours

   h. Click the **+** button to add a new row

15. On the next line enter:

   a. **Employee ID**

   b. **Empl Rcd**: Defaults to **0**. Update if necessary.

   c. **Earn Code**: STD

   d. **Earns Begin Dt:** Enter begin date of the current pay period (4/25)

   e. **Earns End Dt**: Enter the end date of the current pay period (5/9).

   f. **Amount**: enter the amount from the VSDP Calculation Spreadsheet for STD

16. Validate and submit the transaction for approval.

Review Paycheck Page

In the **Other Earnings** section of the **Review Paycheck** page on the **Paycheck Earnings** tab, you are able to view the STD and RGS hour adjustments entered and loaded from SPOT.

Note: **Source** code of **OP** = SPOT.

Paycheck Earnings	Paycheck Taxes	Paycheck Deductions

Empl ID   **Name**

Company CJS   **Pay Group** SM1   **Pay Period End** 05/09/2021   **Page** 2   **Line** 1   **Separate Check**

Paycheck Information

Paycheck Status Calculated	**Paycheck Option** Check	
Issue Date 05/14/2021	**Paycheck Number**	
☐ Off Cycle ☐ Reprint ☐ Adjustment ☐ Corrected ☐ Cashed		

Paycheck Totals

Earnings	2,083.33
Taxes	359.45
Deductions	340.95
Net Pay	1,382.93

▼ **Earnings**   🔍   ⏮ ◀ 4 of 5 ▶ ⏭   View All

Begin Date 04/25/2021   **End Date** 05/04/2021   **Addl Line Nbr** 7   **Reason**

Empl Record 0   **Benefit Record** 0   Additional Data

Salaried

Hours	0.00
Rate	24.038462
Earnings	0.00

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State VA   **Locality**

Rate Used Hourly Rate

Shift Not Applicable   **Shift Rate**

Other Earnings

⏮ ◀ 1-1 of 1 ▶ ⏭   View All

Other Earnings Details 1	Other Earnings Details 2

Code	Description	Rate Used	Hours	Rate	Amount	Source	
STD	VSDP Benefits	Hourly Rate			1,458.33	OP	

Worker's Compensation

Worker's Compensation works similar the STD transaction process in Cardinal. The only difference would be in the earnings codes used in SPOT.

- In Cardinal there are two types of Worker's Compensation statuses:

    a. **VSDP**

    b. **Traditional**

Example of Worker's Compensation VSDP in a Prior Period

The screenshots below are an example of an employee with worker's compensation (VSDP) with an effective date in the prior period where the employee is eligible for Temporary Total W/C and 100% STD income replacement for the prior and current pay period.

Note: If the prior period is in a prior year, do not process in Cardinal as a prior year adjustment, because we do not want taxes refunded from a prior year. Please work with SPO if this is the case.

For this example:

- Current pay period end date: 4/25/2021

- Effective date of the worker's compensation 4/19/2021
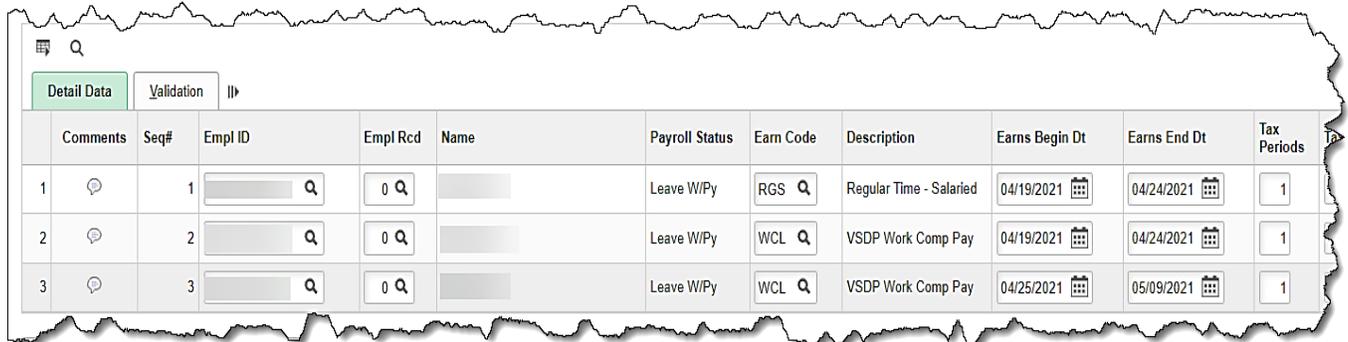
	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods
1	💬	1	🔍	0 🔍		Leave W/Py	RGS 🔍	Regular Time - Salaried	04/19/2021 📅	04/24/2021 📅	1
2	💬	2	🔍	0 🔍		Leave W/Py	WCL 🔍	VSDP Work Comp Pay	04/19/2021 📅	04/24/2021 📅	1
3	💬	3	🔍	0 🔍		Leave W/Py	WCL 🔍	VSDP Work Comp Pay	04/25/2021 📅	05/09/2021 📅	1
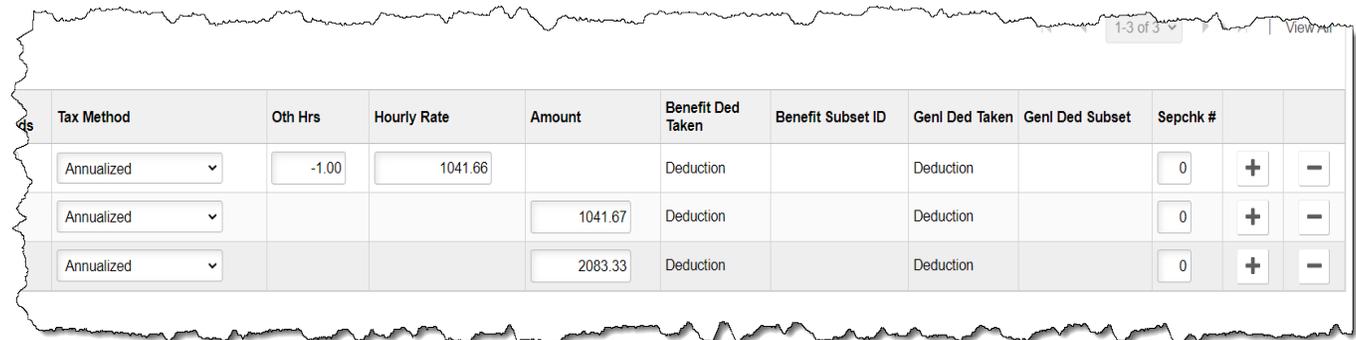
1-3 of 3 View All

Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #		
Annualized	-1.00	1041.66		Deduction		Deduction		0	+	−
Annualized			1041.67	Deduction		Deduction		0	+	−
Annualized			2083.33	Deduction		Deduction		0	+	−

Review Paycheck Page – Worker's Compensation Prior Period

In this example, since the Worker's compensation was from a prior period, you can see that the taxes were taken from the prior paycheck (first screenshot). On the current pay period paycheck you can see that the taxes were refunded (second screenshot) based on the prorated time when the worker's compensation became effective.

Paycheck Taxes from prior paycheck

Paycheck Earnings	**Paycheck Taxes**	Paycheck Deductions					

Empl ID   Name

Company   CJS   Pay Group   SM1   Pay Period End   04/24/2021   Page   999   Line   1   Separate Check

Paycheck Information

Paycheck Status   Calculated   Paycheck Option   Check

Issue Date   04/30/2021   Paycheck Number

☑ Off Cycle   ☐ Reprint   ☐ Adjustment   ☐ Corrected   ☐ Cashed

Paycheck Totals

Earnings	2,083.33
Taxes	366.89
Deductions	196.17
Net Pay	1,520.27

▼ Taxes   1-7 of 7   View All

Tax Details 1 | Tax Details 2 | Tax Tips

Tax Entity	State	Resident	Locality	Locality Name	Tax Class	Taxable Gross	Tax Amount
US Federal					MED/EE	2,022.83	29.33
US Federal					Med/ER	2,022.83	29.33
US Federal					OASDI/EE	2,022.83	125.41
US Federal					OASDI/ER	2,022.83	125.41
US Federal					Withholdng	1,898.66	127.38
State	VA				Unempl ER	2,011.33	
State	VA	Y			Withholdng	1,898.66	84.77

▼ 1042 Taxes

Paycheck Taxes refunded on the Current Paycheck

| Paycheck Earnings | Paycheck Taxes | Paycheck Deductions |

Empl ID _____   Name _____

Company CJS   Pay Group SM1   Pay Period End 05/09/2021   Page 4   Line 1   Separate Check

Paycheck Information

Paycheck Status Calculated   Paycheck Option Check
Issue Date 05/14/2021   Paycheck Number
☐ Off Cycle   ☐ Reprint   ☐ Adjustment   ☐ Corrected   ☐ Cashed

Paycheck Totals

Earnings 2,083.34
Taxes -150.39
Deductions 276.53
Net Pay 1,957.20

▼ Taxes

1-7 of 7 | View All

| Tax Details 1 | Tax Details 2 | Tax Tips |

Tax Entity	State	Resident	Locality	Locality Name	Tax Class	Taxable Gross	Tax Amount
US Federal					MED/EE	-1,030.16	-14.94
US Federal					Med/ER	-1,030.16	-14.94
US Federal					OASDI/EE	-1,030.16	-63.87
US Federal					OASDI/ER	-1,030.16	-63.87
US Federal					Withholdng	-1,030.16	-35.42
State	VA				Unempl ER	-1,041.66	
State	VA	Y			Withholdng	-1,030.16	-36.16

Example of Worker's Compensation VSDP Transaction

The screenshots below are an example of an employee with worker's compensation (VSDP) with an effective date at the beginning of the pay period. The screenshot below shows the additional transaction that would be required if additional pay was due to the employee to meet the total income replacement threshold.

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax
1	💬	1	🔍	0 🔍		Leave W/Py	WCL 🔍	VSDP Work Comp Pay	04/25/2021 📅	05/09/2021 📅	1	An

1-1 of 1 | View All

Tax Periods	Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #		
1	Annualized			2083.33	Deduction		Deduction		0	+	−

Review Paycheck Page – Worker's Compensation VSDP

Paycheck Earnings	Paycheck Taxes	Paycheck Deductions

Empl ID   **Name**

Company CJS   **Pay Group** NS1   **Pay Period End** 05/09/2021   **Page** 6   **Line** 2   **Separate Check**

Paycheck Information

Paycheck Status   Calculated   **Paycheck Option**   Check

Issue Date   05/14/2021   **Paycheck Number**

☐ Off Cycle   ☐ Reprint   ☐ Adjustment   ☐ Corrected   ☐ Cashed

Paycheck Totals

Earnings	2,083.33
Taxes	0.00
Deductions	771.84
Net Pay	1,311.49

▼ Earnings   🔍 | |◀ ◀   4 of 7   ▶ ▶| | View All

Begin Date 04/25/2021   **End Date** 05/09/2021   **Addl Line Nbr** 6   **Reason**

Empl Record 0   **Benefit Record** 0   **Original Paygroup** NS1   **Additional Data**

Salaried

Hours	0.00
Rate	24.038462
Earnings	0.00

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State VA   **Locality**

Rate Used Hourly Rate

Shift Not Applicable   **Shift Rate**

Other Earnings

🔍 |◀ ◀   1-1 of 1   ▶ ▶| | View All

Other Earnings Details 1	Other Earnings Details 2	‖▶

Code	Description	Rate Used	Hours	Rate	Amount	Source
WCL	VSDP Work Comp Pay	Hourly Rate			2,083.33	OP

Example Worker's Compensation SPOT for Traditional

The screenshots below are an example of an employee with worker's compensation (Traditional) with an effective date at the beginning of the period where the employee is eligible for worker's compensation and worker's compensation supplement.

	Comments	Seq#	Empl ID	Empl Rcd	Name	Payroll Status	Earn Code	Description	Earns Begin Dt	Earns End Dt	Tax Periods	Tax M
1	💬	1	🔍	0 🔍		Leave W/Py	WCP 🔍	Workers Comp	04/25/2021	05/09/2021	1	Annu
2	💬	2	🔍	0 🔍		Leave W/Py	WCS 🔍	Workers Comp Supplement	04/25/2021	05/09/2021	1	Annu

Tax Method	Oth Hrs	Hourly Rate	Amount	Benefit Ded Taken	Benefit Subset ID	Genl Ded Taken	Genl Ded Subset	Sepchk #		
Annualized			1000.00	Deduction		Deduction		0	+	−
Annualized			1083.33	Deduction		Deduction		0	+	−

Review Paycheck Page – Worker's Compensation Traditional

Paycheck Earnings	Paycheck Taxes	Paycheck Deductions

Empl ID   **Name**

Company CJS   **Pay Group** NS1   **Pay Period End** 05/09/2021   **Page** 8   **Line** 1   **Separate Check**

Paycheck Information

Paycheck Status Calculated	**Paycheck Option** Check
Issue Date 05/14/2021	**Paycheck Number**

☐ Off Cycle   ☐ Reprint   ☐ Adjustment   ☐ Corrected   ☐ Cashed

Paycheck Totals

Earnings	2,083.33
Taxes	163.19
Deductions	194.24
Net Pay	1,725.90

Earnings   🔍 | |◄   ◄   8 of 8   ►   ►| | View All

Begin Date 04/25/2021   **End Date** 05/09/2021   **Addl Line Nbr** 10   **Reason**

Empl Record 0   **Benefit Record** 0   **Original Paygroup** NS1   Additional Data

Salaried

Hours	0.00
Rate	24.038462
Earnings	0.00

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State VA   **Locality**

Rate Used Hourly Rate

Shift Not Applicable   **Shift Rate**

Other Earnings

🔍 |◄   ◄   1-1 of 1   ►   ►| | View All

Other Earnings Details 1	Other Earnings Details 2	

Code	Description	Rate Used	Hours	Rate	Amount	Source	
WCP	Workers Comp	Hourly Rate			1,000.00	OP	

Paycheck Earnings	Paycheck Taxes	Paycheck Deductions

Empl ID   **Name**

Company   CJS   Pay Group   NS1   Pay Period End   05/09/2021   Page   8   Line   1   Separate Check

Paycheck Information

Paycheck Status	Calculated	Paycheck Option Check
Issue Date	05/14/2021	Paycheck Number
☐ Off Cycle	☐ Reprint ☐ Adjustment	☐ Corrected ☐ Cashed

Paycheck Totals

Earnings	2,083.33
Taxes	163.19
Deductions	194.24
Net Pay	1,725.90

▼ **Earnings**   🔍 | |◀   ◀   7 of 8 ▾   ▶   ▶| | View All

Begin Date   04/25/2021   End Date   05/09/2021   Addl Line Nbr   9   Reason

Empl Record   0   Benefit Record   0   Original Paygroup   NS1   Additional Data

Salaried

Hours	0.00
Rate	24.038462
Earnings	0.00

Hourly

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

Overtime

Hours	0.00
Rate	0.000000
Earnings	0.00
Rate Code	

State   VA   Locality

Rate Used   Hourly Rate

Shift   Not Applicable   Shift Rate

Other Earnings

⊞ 🔍 |◀   ◀   1-1 of 1 ▾   ▶   ▶| | View All

Other Earnings Details 1	Other Earnings Details 2	‖▶

Code	Description	Rate Used	Hours	Rate	Amount	Source	
WCS	Workers Comp Supplement	Hourly Rate			1,083.33	OP	

Appendix

Crosswalk between Short Term Disability and Worker's Compensation

When entering worker's compensation in SPOT, use the appropriate earnings code based on the type of worker's comp that is applicable for the employee.

Account	Description	Taxability	CIPPS Code	VSDP Cardinal Earnings Code	Traditional Cardinal Earnings Code
5011510	Worker's Compensation	NonTaxable	002	WCP	WCP
5011520	W/C Supplement	Taxable	063		WCS
5011530	VSDP - non-work related	Taxable	061	STD	
5011540	VSDP/WC - VSDP for work related	NonTaxable	062	WCL	