



501 TA363

Time and Attendance Administration

Instructor Led Training



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

This course, and the supplemental resources listed below, are located on the Cardinal website (www.cardinalproject.virginia.gov) under Training.

Cardinal Reports Catalogs are located on the Cardinal website under Resources:

- Instructor led and web based training course materials
- Job aids on topics across all functional areas
- Glossary of frequently used terms

The Cardinal screenshots included in this training course show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



Course Objectives

After completing this course, you will be able to:



Create and maintain position, personal, and job data



Enroll and maintain Time Reporters and compensatory leave plans



Manage work schedules



Review and manage time after payroll processing



Agenda

1

Understanding Time and Attendance

2

Creating and Maintaining Position, Personal, and Job Data

3

Enrolling and Maintaining Time Reporters & Compensatory Leave Plans

4

Managing Work Schedules

5

Time and Attendance Administration Hands-On Practice



Lesson 1: Introduction

1

Understanding Time and Attendance

This lesson covers the following topics:

- Time and Attendance Overview
- Key Concepts
- Time and Attendance Processes
- Integration and Interfaces



Time and Attendance Overview

The Time and Attendance functional area contains two modules:

Time and Labor

Involves employee setup, input of time and attendance, payroll integration, and cost allocation

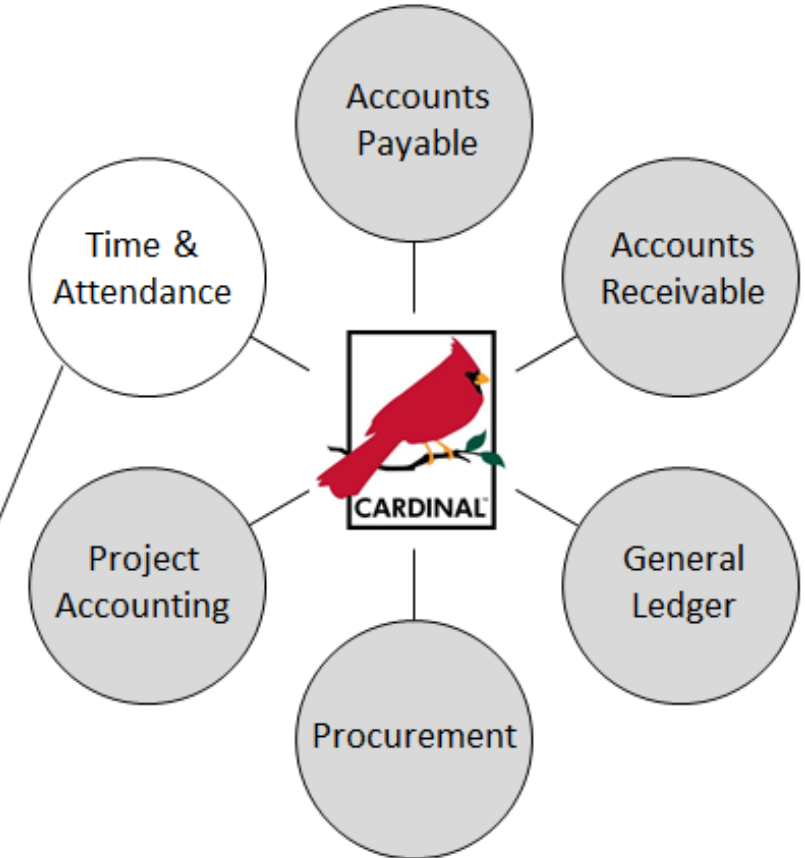
Absence Management

Involves the processing and managing of employee absences

Modules

	Time & Labor	
	Absence Management	

Cardinal Functional Areas





Key Concepts

Key concepts in Time and Attendance Administration include:

- Cardinal displays time and absences using a **weekly** calendar format.
- **SpeedTypes** can be used to auto populate some ChartField values.
- Absence requests are available for approval immediately after submission.
- **Absence requests**, for accrued (e.g., vacation, sick) and frequency based (e.g. Employee Recognition Program – ERL) absence types must be forecasted to determine absence availability.
- Absence requests, once approved, are processed by the Absence Calculation process which validates and processes approved absences.
- Cardinal captures and tracks **contract hours**, **contract start date**, and **contract end date** for hourly employees.
- The Time Administration process creates exceptions (warnings or errors) for time entered that does not meet defined business rules.
- Productive time is not routed for approval until it has been submitted and successfully processed through **Time Administration**.
- Employees and Timekeepers can enter and adjust absences and productive time back to the beginning of the **current fiscal year or six prior pay periods back, whichever is less**.



Key Concepts (continued)

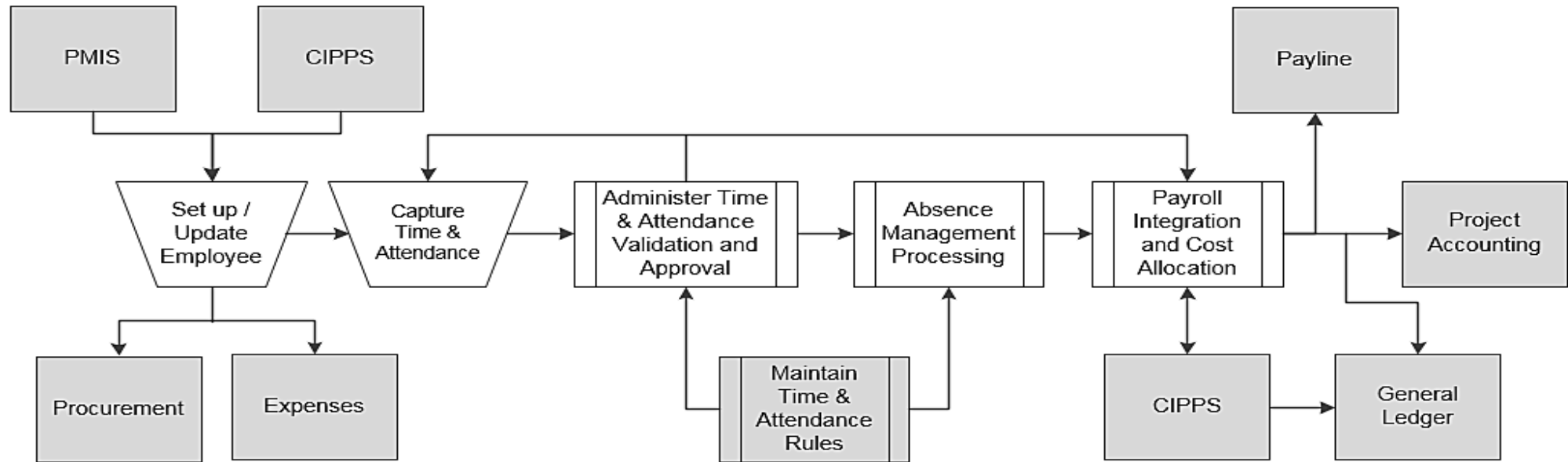
- In Employee Self Service, the employee enters time, selects a **TRC** (Time Reporting Code), and enters **charge distribution codes**.
- Once time is entered and saved, the employee must submit their time for processing. The **Time Administration** process then validates time reported and routes it for approval.
- **Position, personal, job data, and time reporter data** are required for all employees to process time and absences.
- Time reporting effective date and status control the time periods available for entry on an employee's timesheet.
- **Workgroups** determine the Time Reporting Codes available on an employee's timesheet and the time reporting rules that apply to the employee during processing.
- **Work schedules** apply to many of the time processing rules and exceptions and also determines the value of full or half day absences.
- Timely review of timesheet entries and resolution of rule exceptions is critical for accurate payroll and allocation processing.



Time and Attendance Process Flow

The Time and Attendance functional area includes five processes:

- Employee Setup
- Time and Attendance Capture
- Administer Time and Attendance Validation and Approval
- Absence Management Processing
- Payroll Integration and Interface Processing





Employee Setup

Most position, personal, and employee data is loaded into Cardinal from the Personnel Management Information System (PMIS) daily.

The Personnel Management Information System (PMIS) is used when a new position is created or changed. PMIS then sends the information to Cardinal to establish **Position Data** in Cardinal. When employees are added or updated, their personnel data is first entered into PMIS. PMIS then sends the employee information (employee name, address, role, hourly, salaried, etc.) to Cardinal to create an employee profile.

Errors from the PMIS upload must be reviewed and may require manual entry or correction to address the error. If position or employee data is incorrect in PMIS, it must be corrected in both PMIS and Cardinal to keep the two systems in sync. Other errors and warnings generated by the PMIS interface may be entered or corrected directly in Cardinal. Additional manual entry is required as part of employee time and attendance setup for specific actions, such as new hires and terminations.



Time and Attendance Capture, Validation and Approval, and Absence Management Processing

Time and Attendance Capture - There are two ways to capture time:

- **Employee Self Service** - employees enter their own time and absence requests
- **Manager Self Service** - a supervisor or Timekeeper enters time and absence requests for employees

Administer Time and Attendance Validation and Approval: Regardless of the method of entry (e.g., Self Service, Timekeeper) once time is submitted, it is validated through the Time Administration process. Time Administration validates all submitted time against time reporting rules, generates payable time, and routes time to the employee's supervisor for approval. It also identifies any errors related to the time reporting rules and generates exceptions.

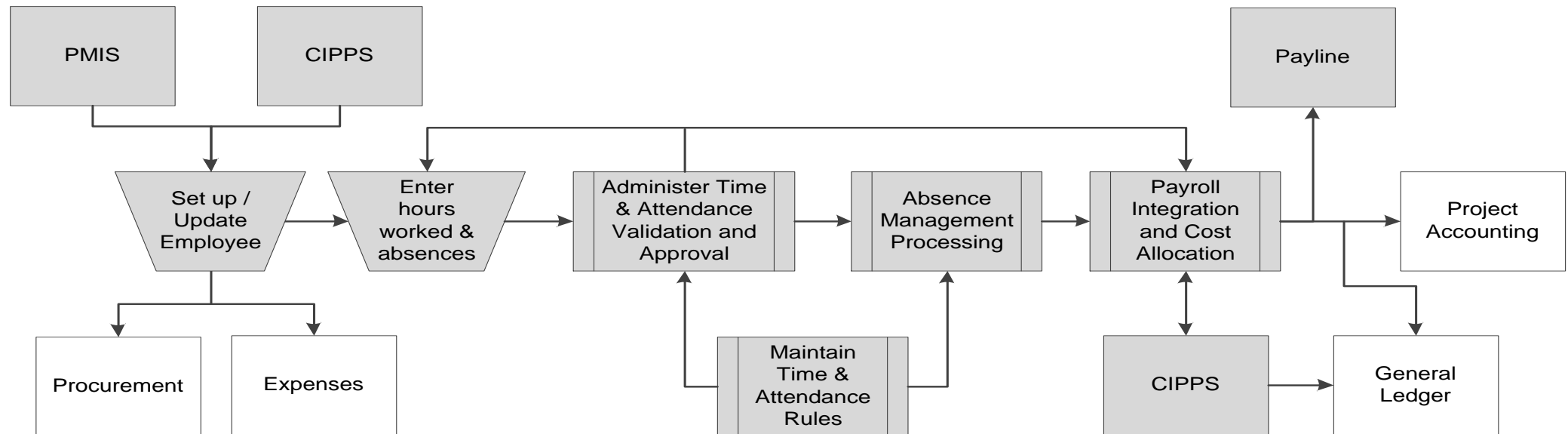
Absence Management Processing: Most absences are entered by the employee or timekeeper on the **Timesheet** page. Cardinal requires forecasting for entitlement absences (e.g. VAC, SCK) and frequency based absences (e.g. Employee Recognition Leave – ERL) and then routes absence requests immediately to the employee's supervisor for approval.



Integration

Time and Attendance sends employee profile information including employee's **Reports to** information integrating with **Accounts Payable** for employee travel reimbursement processed through **Expenses**. In addition, **Procurement** uses employee information for Purchase Order workflow approvals.

Cardinal uses time and charge distribution information from employee timesheets to allocate payroll costs according to the distributions entered on timesheets. That allocated labor cost is shared with and posts to the General Ledger. Those labor costs associated with projects also are sent to Project Accounting and used to bill participating projects.



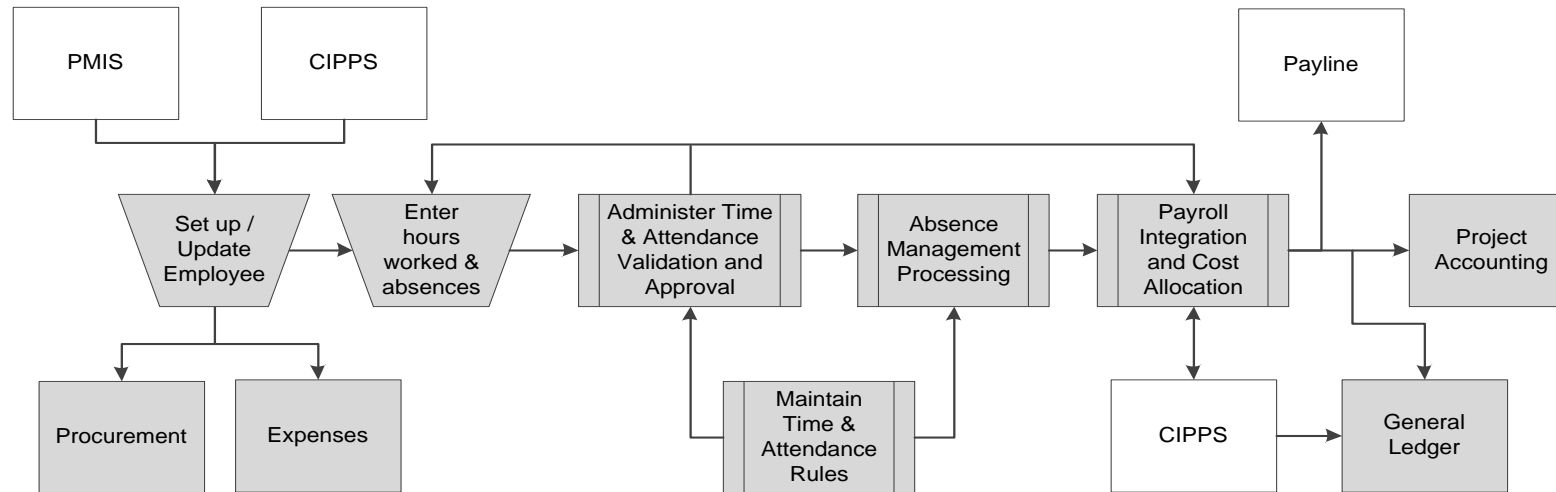


Interfaces

Time and Attendance also interacts with external systems such as PMIS, CIPPS (Commonwealth Integrated Payroll / Personnel System), and Department of Account's Payline system. The PMIS interface uploads most position, personal, and job (employee) data into Cardinal. That interface updates Cardinal data and overwrites some updates keyed directly into Cardinal. Make sure that personal, position, and job data updates are keyed directly in PMIS timely, so that interfaced data is correct. The PMIS Interface also creates a daily error log for review and some data may need to be manually keyed into Cardinal if the interface was unable to update the data.

Cardinal transmits overtime hours and rates for salaried employees and regular and overtime hours and rates for hourly employees to CIPPS. Once the payroll is processed, CIPPS sends the Expanded Current Earnings data back to Cardinal. Cardinal uses this data, along with the time and charge distribution information from employee timesheets, to allocate payroll.

At the end of each semi-monthly pay cycle, Cardinal transmits salaried employees' absence and leave information to Payline.





Lesson 1: Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. Employee data is uploaded from CARS into Cardinal?

True or False



2. Time and Attendance integrates Accounts Payable and Accounts Receivable?

True or False



Lesson 1: Summary

1

Understanding Time and Attendance

In this lesson, you learned:

- The PMIS inbound interface drives most of the position, personal, and job data in Cardinal. There is some data that must be added or updated manually (e.g., Reports To, Work Schedule, Time Reporter).
- Time and Attendance shares some employee information with Accounts Payable's Expenses module and with the Purchasing module to support employee travel and business expense reimbursement processing and Small PCard Program use.
- Employee labor costs are posted in General Ledger when employee pay is distributed according to the time and charge distribution information on employee timesheets. Any labor costs associated with projects are also sent to Project Accounting.



Lesson 2: Introduction

2

Creating and Maintaining Position, Personal, and Job Data

This lesson covers the following topics:

- Relationship between Position, Personal, and Job Data
- Viewing Position, Personal, and Job Data
- Reviewing and Correcting PMIS Interface Updates and Errors
- Adding and Updating Position, Personal, and Job Data Manually
- Maintaining Reports To Approvers
- Enrolling and Maintaining Time Reporters and Compensatory Leave Plans
- Impacts and Actions for Specific Changes



Relationship between Position, Personal, and Job Data

Position Data allows Cardinal to track organizational values and reporting relationships independently of the employee in the position assigned by Cardinal. Position Data values include title, department, job code, location, and **Reports to** position number.

Personal Data includes biographical details for an employee, such as name and address. A person must have an **organizational relationship** established to identify the person as an **Employee** and associate the Job Data information.

Job Data includes the organizational details for an employee. Every employee has a **position number** assigned on Job Data. When a position is assigned to an employee on Job Data, Cardinal uses certain Position Data values to default organizational values on the employee's job record.



Viewing Position and Personal Data

Position Data includes information related to the employee's position which includes: Position number, Job Code, Title, Department, Location, Reports To (position number of approver), Standard Hours, and FLSA Status. You can view Position data through the **Add/Update Position Info** page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

Personal Data includes information about the employee which includes: **Person ID** (matches Employee ID), **Name** (legal name), **Home Address**, and **Email Address** (optional). To view Personal Data, navigate using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Workforce Administration > Personal Information > Modify a Person



Viewing Job Data

Job Data includes information related to the job which includes Action / Reason, HR / Payroll Status, Position Number, Department, Location, Reports To, Absence and Payroll Groups, Compensation, Company, and Seniority Date. You can view Job Data by accessing the **Job Data** page by using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Workforce Administration > Job Information> Job Data

There may be multiple effective dated rows for each position, person, or employee. To view all rows, use the **Include History** button and arrows to navigate through the rows.



Reviewing and Correcting PMIS Interface Updates and Errors

Most Personnel, Position, and Job (Employee) information is entered into PMIS and then interfaced to Cardinal. Sometimes, the PMIS Interface is unable to update position, personal, or employee data in Cardinal and an error is generated. There are reports and queries available to help you research errors such as the PMIS Error Report and Employee Setup queries.

For more detailed information about viewing the Timesheet Report, see the job aid entitled **501 TA: Cardinal Reports Catalog Time & Attendance** located on the Cardinal website in **Reports Catalog** under **Resources**.

The PMIS interface drives personnel, position, and job setup in Cardinal. That interface includes data that is new or has changed due to various reasons which include:

- **New hire**
- **Termination / Death**
- **Switching pay groups from salaried to hourly (or vice versa)**
- **Change in position**



Reviewing and Correcting PMIS Interface Updates and Errors (continued)

The PMIS interface runs each morning and processes data that was either entered in PMIS the previous day or became effective on the day the interface is run. The interface **only** updates data in Cardinal that is necessary for time and attendance reporting and processing.

The updates made by the PMIS interface should be reviewed in Cardinal for accuracy. If data is found to be incorrect, research must be done to ensure that PMIS data is corrected and that the corrected data is subsequently loaded into Cardinal.

There are some scenarios where the PMIS interface is unable to update Cardinal (i.e. due to missing or invalid data or effective date issue). In these cases, the PMIS interface generates an error message that should be reviewed, and errors corrected as needed.

There are two types of errors that can occur:

- Position Data errors
- Profile Data errors



Reviewing and Correcting PMIS Position Data

PMIS Interface error and warning messages for **Position Data** can be reviewed on the **PMIS Position Errors** page.

You can navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Workforce Administration > PMIS Interface Administration > PMIS Position Errors

Enter your search criteria which includes:

- **Date Processed**
- **Business Unit**
- **Employee Type**
- **Location Code**

The **Employee Type** field contains a drop-down box and offers the options of **Hourly**, **Not Applicable**, and **Salary**.

The screenshot shows the 'PMIS Position Errors' page. At the top is a navigation breadcrumb: 'Favorites > Main Menu > Workforce Administration > PMIS Interface Administration > PMIS Position Errors'. Below the breadcrumb is the page title 'PMIS Position Errors' and a instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a button 'Find an Existing Value'. Below that is a section titled 'Search Criteria' with four search fields: 'Date Processed' (with an equals sign dropdown and a date picker icon), 'Business Unit' (with a 'begins with' dropdown), 'Employee Type' (with an equals sign dropdown and a dropdown menu), and 'Location Code' (with a 'begins with' dropdown). At the bottom are buttons for 'Search', 'Clear', 'Basic Search' (with a magnifying glass icon), and 'Save Search Criteria'.



Reviewing and Correcting PMIS Position Data (continued)

In this example, **Date Processed** and **Employee Type** are entered.

Click the **Search** button.

The **Search Results** display at the bottom of the page.

Click the appropriate hyperlink to access the error(s).

Favorites ▾Main Menu ▾ > Workforce Administration ▾ > PMIS Interface Administration ▾ > PMIS Position Errors

PMIS Position Errors

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

Find an Existing Value

▼ Search Criteria

Date Processed = ▾07/27/2019

Business Unit begins with ▾

Employee Type = ▾Salaried ▾

Location Code begins with ▾

Search

Clear

Basic Search

Save Search Criteria

Search Results

View AllFirst1-3 of 3Last

Date Processed	Business Unit	Employee Type	Location Code
07/27/2019	50100	Salaried	10
07/27/2019	50100	Salaried	14
07/27/2019	50100	Salaried	15

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Reviewing and Correcting PMIS Position Data (continued)

The record populates and the search contains additional filters.

- **Reviewed** and **No Change** rows can be eliminated. The refined search also allows **Auto-Review No Change** rows.
- After reviewing the error, click the **Reviewed** checkbox and then click **Save**.
- While it is not mandatory, it is suggested a comment be added by clicking the **Comments** link to keep track of the errors reviewed and/or corrected.

Favorites ▾Main Menu ▾> Workforce Administration ▾> PMIS Interface Administration ▾> PMIS Position Errors

New Window | Personalize Pa

PMIS Position Errors

Business Unit: 50100Employee Type: Salaried
Date Processed: 07/27/2019

☐ Don't show 'Reviewed' rows
☐ Don't show 'No change' rows☐ Auto-Review 'No Change' rows

Personalize | Find | View All |

First 1-3 of 3 Last

	Reviewed	Location Code	Position Number	Effective Date	PMIS DateTime	Cardinal Field Name	Cardinal Old Value	Cardinal New Value	Error Type	Error Text	Comments
1	<input checked="" type="checkbox"/>	15	13215	07/26/2019	07/26/19 3:48:10PM				N	Position description is the only change. No job data change to update incumbents	Comment
2	<input checked="" type="checkbox"/>	15	23233	07/26/2019	07/26/19 12:30:26PM				N	Position description is the only change. No job data change to update incumbents	Comment
3	<input checked="" type="checkbox"/>	15	23238	07/26/2019	07/26/19 12:31:26PM				N	Position description is the only change. No job data change to update incumbents	Comment



Reviewing and Correcting PMIS Profile Data

PMIS Interface error and warning messages for Profile Errors (Personal and Job Data) can be reviewed on the **PMIS Profile Errors** page.

Navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Workforce Administration > PMIS Interface Administration > PMIS Profile Errors

Follow the same steps used to review Position Data.

To view errors:

- Enter your search criteria.
- Click the **Search** button.
- Select the appropriate link.

Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > PMIS Interface Administration ▾ > PMIS Profile Errors

PMIS Profile Errors

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

[Find an Existing Value](#)

▼ **Search Criteria**

Date Processed	= ▾	07/17/2019
Business Unit	begins with ▾	50100
Location Code	begins with ▾	
Employee Type	= ▾	Salaried ▾

☐ Include History ☐ Correct History

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

Search Results

View All First 1-5 of 5 Last

Date Processed	Business Unit	Location Code	Employee Type
07/17/2019	50100	11	Salaried
07/17/2019	50100	12	Salaried
07/17/2019	50100	13	Salaried
07/17/2019	50100	16	Salaried
07/17/2019	50100	19	Salaried



Reviewing and Correcting PMIS Profile Data (continued)

Similar to Position Data:

- Review the error(s).
- Click the **Reviewed** checkbox.
- Add a **Comment** (not required, but recommended).
- Click the **Save** button.

Favorites ▾Main Menu ▾ > Workforce Administration ▾ > PMIS Interface Administration ▾ > PMIS Profile Errors

New Window | Personalize Page |

PMIS Profile Errors

Business Unit: 50100Employee Type: Salaried
Date Processed: 07/17/2019

☐ Don't show 'Reviewed' rows

☐ Don't show 'No change in Data' rows☐ Auto Review 'No change in Data' rows

☐ Don't show 'No change in Personal Data' rows☐ Auto Review 'No change in Personal Data' rows

☐ Don't show 'No change in Job Data' rows☐ Auto Review 'No change in Job Data' rows

Personalize | Find | View All | | First 1 of 1 Last

Reviewed	Location Code	Emplid	Effective Date	PMIS DateTime	Cardinal Field Name	Cardinal Old Value	Cardinal New Value	Error Type	Error Text	Comments
1 <input checked="" type="checkbox"/>	13	00757340600	06/10/2019	07/16/19 11:55:07AM				E	Employee Job Data has effective dated rows greater than the effective date of this transaction	Comments

SaveReturn to SearchPrevious in ListNext in ListNotify

Update/DisplayInclude HistoryCorrect History



Adding and Updating Position, Personal, and Job Data Manually

If there is a need to add or update position data, personal data, or job data directly in Cardinal, use the same page(s) that was used to view the data. Use the plus sign (+) to add a row and minus sign (-) to delete a row.

Remember that Cardinal has three types of effective dated information:

- **Current** - The record with an effective date less than or equal to the current date (today's date).
- **History** - All records with effective dates prior to the date on the current row.
- **Future** - All records with effective dates greater than today's date. Note: Future-dated position, personal, and job data is not interfaced by DHRM (the Commonwealth's Department of Human Resource Management) until the date it becomes effective in PMIS.

Adding a row vs. using Correct History:

- To add or update data, enter a new record with an effective date. The effective date is the date that the new record becomes active.
- If data effective prior to the most recent effective dated row needs to be corrected or added, use the **Correct History** button to correct or insert older effective dated rows. In this case, you may also need to correct the data on other rows.
- Use **extreme caution** when using the **Correct History** button as you may accidentally overwrite data that is correct for an effective dated row.



Adding and Updating Position, Personal, and Job Data Manually (continued)

Most positions and new hires (including rehires or transfers from other agencies not previously in Cardinal) should be interfaced to Cardinal by the PMIS Interface.

However, the user can enter a new position or employee, directly into Cardinal, should the need arise.

To enter a new hire online, the user will:

- **Add a Position**
- **Add a Person**
- **Add Job Data**



Add a Position

Navigate to the **Add/Update Position Info** page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

From the **Add a New Value** tab:

- Enter the position number in the **Position Number** field.
- Click the **Add** button.



Add a Position (continued)

Enter or select the following fields:

- **Effective Date** (if different from current date)
- **Job Code**
- **Reg/Temp**
- **Department**
- **Reports To** position number

Standard hours only need to be updated if part time. This is not the schedule being used.

Click on the **USA** flag to open the **FLSA Status** field. This field defaults to **Non-Exempt**. If the position is exempt, select **Professional**.

Click the **Save** button to save the new position.

The screenshot shows a web application interface for adding a position. The breadcrumb trail at the top is: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. The form is divided into several sections:

- Position Information:** Includes fields for Position Number (20001561), Headcount Status, Current Head Count (0 out of 0), *Effective Date (10/09/2019), *Status (Active), Reason (NEW), New Position, *Position Status (Approved), Status Date (10/09/2019), Action Date (10/10/2019), and a checkbox for Key Position. An 'Initialize' button is present.
- Job Information:** Includes *Business Unit (50100 - VDOT Business Unit), Job Code (19034 - Fin Svcs Mgr I), *Reg/Temp (Regular), *Full/Part Time (Full-Time), *Regular Shift (Not Applicable), Union Code, Title (Fin Svcs Mgr I), Short Title (Fin Svcs), and a link for Detailed Position Description.
- Work Location:** Includes *Reg Region (USA - United States), Department (10014 - Financial Planning), Location (10 - VDOT Central Office), Reports To (00003 - Gen Admin Manager III), Supervisor Lvl, Company (DOT - Virginia Dept of Transportatio), Dot-Line, and Security Clearance.
- Salary Plan Information:** Includes Salary Admin Plan, Grade, Step, Standard Hours (40.00), Work Period (W - Weekly), and a table for standard hours by day of the week (Mon-Sun, all 8.00).
- FLSA Status:** A dropdown menu showing 'Nonexempt'. A red box highlights the USA flag icon next to it.
- Bargaining Unit:** A field with the value 8888.
- Buttons:** A 'Save' button is highlighted with a red box. Other buttons include 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.



Add a Position (continued)

Navigation: Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Tabs: Description | **Specific Information** | Budget and Incumbents

Position Information Find | View All First 1 of 1 Last

Position Number 34567891

Headcount Status Current Head Count 0 out of 0

*Effective Date 10/09/2019 *Status Active Initialize

Reason NEW New Position Action Date 10/10/2019

*Position Status Approved Status Date 10/09/2019 ☐ Key Position

Job Information

*Business Unit 50100 VDOT Business Unit

Job Code 19034 Fin Svcs Mgr I

*Reg/Temp Regular *Full/Part Time Full-Time

*Regular Shift Not Applicable Union Code

Title Fin Svcs Mgr I Short Title Fin Svcs Detailed Position Description

Work Location

*Reg Region USA United States

Department 10000 All Central Office Orgs Company DOT Virginia Dept of Transportatio

Location 10 VDOT Central Office

Reports To 00014 Financial Services Manager III Dot-Line

Supervisor Lvl Security Clearance

Salary Plan Information

Salary Admin Plan Grade Step

Standard Hours 40.00 Work Period W Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
8.00	8.00	8.00	8.00	8.00		

USA

FLSA Status Nonexempt Bargaining Unit 8888

Updated on Updated By

Buttons: Save Notify Add Update/Display Include History Correct History

Footer: Description | Specific Information | Budget and Incumbents



Add a Position (continued)

Click the **Specific Information** tab. It contains two important fields:

- **Max Head Count** - This field indicates the number of individuals that can be assigned to the position and can be adjusted as appropriate. For agency 50100 (VDOT), this value should always be **1**.
- **Update Incumbents** - This checkbox is checked once an employee is assigned to the position. Cardinal does not allow you to check this box until then.

The screenshot shows a web application interface for adding or updating a position. The breadcrumb trail at the top reads: Favorites > Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info. Below this is a tabbed interface with three tabs: Description, Specific Information (selected), and Budget and Incumbents. The main content area displays the following information:

- Position Number: 20001561
- Headcount Status: Current Head Count 0 out of 0
- Specific Information** section (with Find | View All, First, 1 of 1, Last navigation):
 - Effective Date: 10/09/2019
 - Status: Active
 - Max Head Count: 1 (input field)
 - Mail Drop ID: (empty input field)
 - Work Phone: (empty input field)
 - Health Certificate: (dropdown menu)
 - Signature Authority: (dropdown menu)
- Incumbents** section (checkboxes):
 - ☐ Update Incumbents
 - ☐ Include Salary Plan/Grade
 - ☐ Force Update for Title Changes
 - ☒ Budgeted Position
 - ☐ Confidential Position
 - ☐ Job Sharing Permitted
 - ☐ Available for Telework
- Education and Government** section (collapsed)

At the bottom, there are buttons for Save, Notify, Add, Update/Display, Include History, and Correct History. The footer shows the active tabs: Description | Specific Information | Budget and Incumbents.



Add a Position (continued)

Click the **Budget and Incumbents** tab.

For a new position, the **Current Incumbents** field displays as shown in the image below.

If there is an active employee in the position, the **Empl ID** and **Name** display, and the **Job Data** hyperlink is enabled to allow direct access to the incumbent's Job Data.

Click the **Save** button to save the position.

Favorites ▾Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

DescriptionSpecific InformationBudget and Incumbents

Position Number 20001561

Headcount StatusCurrent Head Count 0 out of 0

Current Budget

Head Count 0Current Budget FTE 0.00Amount 0.000

Current Incumbents

Personalize | Find | 1 of 1

Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
	0		0.00		10/10/2019				Job Data

SaveNotify

AddUpdate/DisplayInclude HistoryCorrect History

Description | Specific Information | Budget and Incumbents



Add a Person

Navigate to the **Add a Person** page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Workforce Administration > Personal Information > Add a Person

Adding a new person and adding job data for the person in Cardinal should be considered a single process and should be completed all at the same time.

Enter **Person ID** (Employee ID) and click the **Add Person** button.

A screenshot of the 'Add a Person' page in the Cardinal HCM system. The page has a blue header bar with a breadcrumb trail: 'Favorites' (with a dropdown arrow), 'Main Menu' (with a dropdown arrow), '>', 'Workforce Administration' (with a dropdown arrow), '>', 'Personal Information' (with a dropdown arrow), '>', and 'Add a Person'. Below the header, the title 'Add a Person' is displayed in blue. The main content area contains a label 'Person ID' followed by a text input field containing the value '00123123700'. Below the input field is an orange button labeled 'Add Person'. At the bottom of the form, there is a blue link that says 'Search for Matching Persons'.



Add a Person (continued)

Enter or select the **Effective Date** for the employee you are adding. This field defaults to the current date and can be changed.

Click the **Add Name** button.

Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Biographical Details | Contact Information | Regional | Organizational Relationships

Person ID 00123123700

Name Find | View All First 1 of 1 Last

*Effective Date 10/10/2019 x [31]
*Format Type English
Display Name Add Name

Biographic Information

Date of Birth [31] Years 0 Months 0
Birth Country USA United States
Birth State [31]
Birth Location [31] ☐ Waive Data Protection

Biographical History Find | View All First 1 of 1 Last

*Effective Date 10/10/2019 [31]
*Gender Unknown
*Highest Education Level Not Indicated
*Marital Status Unknown As of [31]
Language Code [31]
Alternate ID [31]
☐ Full-Time Student

National ID Personalize | Find | View All [31] [31] First 1 of 1 Last

*Country	*National ID Type	National ID	Primary ID
USA [31]	Social Security Number [31]	[31]	<input checked="" type="checkbox"/> [31]

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships



Add a Person (continued)

The **Name** pop-up window displays.

- Enter the employee's full legal name.
- Click the **Refresh Name** button to confirm the name is correct. If not, you can make changes and click the **Refresh Name** button again.
- Click the **OK** button to return to the **Biographical Details**.

The screenshot shows a web application interface with a breadcrumb trail: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person. The 'Name' pop-up window is open, titled 'Name' in blue. It contains a section 'English Name Format' with the following fields: 'Name Prefix' (a dropdown menu), '*First Name' (text input with 'Patricia'), 'Middle Name' (text input with 'Denise'), '*Last Name' (text input with 'Portal'), and 'Name Suffix' (a dropdown menu). Below these fields are three labels: 'Display Name', 'Formal Name', and 'Name'. At the bottom of the window are three buttons: 'OK', 'Cancel', and 'Refresh Name'.



Add a Person (continued)

The **Biographical Details** tab returns. The employee's first and last name now displays at the top corner of the page.

No additional date entry is required on the **Biographical Details** tab.

Do **not** enter the employee's **Date of Birth** or **Social Security Number**.

Click the **Contact Information** tab.

Favorites ▾Main Menu ▾> Workforce Administration ▾> Personal Information ▾> Add a Person > Modify a Person

Biographical DetailsContact InformationRegionalOrganizational Relationships

Patricia PortalEmpl ID 00123123700

Current AddressesPersonalize | Find | View All | [?] [grid] First 1 of 1 Last

Address Type	As Of Date	Status	Address		
Home	10/10/2019	A		Add Address Detail	+ -

Phone InformationPersonalize | Find | View All | [?] [grid] First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred		
<div>▼</div>			<input type="checkbox"/>	+ -	

Email AddressesPersonalize | Find | View All | [?] [grid] First 1 of 1 Last

*Email Type	*Email Address	Preferred		
<div>▼</div>		<input type="checkbox"/>	+ -	

Instant Message IDs ⓘPersonalize | Find | View All | [?] [grid] First 1 of 1 Last

*IM Protocol	*IM Domain	*Network ID	Preferred		
<div>▼</div>			<input type="checkbox"/>	+ -	

SaveNotifyRefreshAddUpdate/DisplayInclude HistoryCorrect History

Biographical Details | Contact Information | Regional | Organizational Relationships



Add a Person (continued)

- Click the **Add Address Detail** link.

Favorites ▾Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Biographical DetailsContact InformationRegionalOrganizational Relationships

Patricia PortalEmpl ID 00123451200

Current AddressesPersonalize | Find | View All | First ◀ 1 of 1 ▶ Last

Address Type	As Of Date	Status	Address			
Home	10/09/2019	A		Add Address Detail	+	-

Phone InformationPersonalize | Find | View All | First ◀ 1 of 1 ▶ Last

*Phone Type	Telephone	Extension	Preferred			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-	

Email AddressesPersonalize | Find | View All | First ◀ 1 of 1 ▶ Last

*Email Type	*Email Address	Preferred			
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-	

Instant Message IDs ?Personalize | Find | View All | First ◀ 1 of 1 ▶ Last

*IM Protocol	*IM Domain	*Network ID	Preferred			
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-	

SaveNotifyRefreshAddUpdate/DisplayInclude HistoryCorrect History

Biographical Details | Contact Information | Regional | Organizational Relationships



Add a Person (continued)

- The **Address History** page displays.
Click the **Add Address** link.
- The **Edit Address** page displays.
Enter home address of the employee.
- Click the **OK** button.
- The **Address History** page returns.
Click **OK** again to return to the **Contact Information** page.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Address History

Address Type Home

Address History		Find	First	1 of 1	Last
*Effective Date	10/09/2019				
Country	USA				
*Status	A				

Add Address

OK Cancel Refresh

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Edit Address

Country United States

Address 1 1234 Cardinal Way

Address 2

Address 3

City Richmond State VA Virginia

Postal 23220

County

OK Cancel



Add a Person (continued)

- Click the **Organizational Relationships** tab which links personal data and job data.

Favorites ▾Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Biographical DetailsContact InformationRegionalOrganizational Relationships

Patricia PortalEmpl ID 00123451200

Current AddressesPersonalize | Find | View All | First ◀ 1 of 1 ▶ Last

Address Type	As Of Date	Status	Address			
Home	10/09/2019	A	1234 Cardinal Way Richmond, VA 23220	Edit/View Address Detail	+ -	

Phone InformationPersonalize | Find | View All | First ◀ 1 of 1 ▶ Last

*Phone Type	Telephone	Extension	Preferred		
<div>▼</div>			<input type="checkbox"/>	+ -	

Email AddressesPersonalize | Find | View All | First ◀ 1 of 1 ▶ Last

*Email Type	*Email Address	Preferred		
<div>▼</div>		<input type="checkbox"/>	+ -	

Instant Message IDs ⓘPersonalize | Find | View All | First ◀ 1 of 1 ▶ Last

*IM Protocol	*IM Domain	*Network ID	Preferred		
<div>▼</div>			<input type="checkbox"/>	+ -	

Save Notify Refresh

Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships



Add a Person (continued)

- Click the **Employee** checkbox.
- Click the **Add Relationship** button.

Note: the **Empl Record** box is grayed out and defaults to **0** since employees can currently only have one job at a time.

Favorites ▾Main Menu ▾> Workforce Administration ▾> Personal Information ▾> Add a Person> Modify a Person

Biographical DetailsContact InformationRegionalOrganizational Relationships

Patricia PortalPerson ID 00123123700

Choose Org Relationship to Add

☒ Employee

☐ Contingent Worker

☐ Person of Interest

Empl Record 0

Add Relationship

SaveNotifyRefreshAddUpdate/DisplayInclude HistoryCorrect History

Biographical Details | Contact Information | Regional | Organizational Relationships



Add a Person (continued)

After you click the **Add Relationships** button:

- A message displays regarding a missing birthdate. Click the **OK** button.
- A second message displays related to Social Security Number. Click the **OK** button.

After clicking the **OK** button on the messages, Cardinal opens the **Job Data** page.

The screenshot shows a 'Message' dialog box with a title bar. The text inside reads: 'Warning -- Birthdate should be entered for person. (1000,167)'. Below this, it explains: 'Birthdate is needed in PS/Payroll, PS/PayLink, and PS/Benefits modules to calculate the person's age. Age may be used to determine premiums or eligibility for the benefit.' It then instructs: 'Enter the Birthdate now if you have the information. Otherwise, obtain the information and then update the employee's record.' At the bottom, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangular border.

The screenshot shows a 'Message' dialog box with a title bar. The text inside reads: 'Warning -- Social Security Number should be entered for US Employees. (1000,835)'. Below this, it explains: 'Social Security Numbers are now required for all persons employed in the United States regardless of citizenship status. You must track this information and should require that it be provided by Employees when they are Hired.' At the bottom, there are two buttons: 'OK' and 'Cancel'. The 'OK' button is highlighted with a red rectangular border.



Add Job Data: Work Location Tab

The **Job Data, Work Location** tab displays with the employee's name in the top right hand corner of the page.

Note: When entering a new hire manually, you **MUST** get all the way through to the end of job data entry or you will end up with a 'ghost' employee that exists in the database but cannot be viewed online.

Navigation: Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Patricia Portal Employee Empl ID 00123451200 Empl Record 0

Work Location Details ? Find First 1 of 1 Last

Go To Row + -

*Effective Date 10/09/2019 x [31] Effective Sequence 0 HR Status Active Payroll Status Active

*Action Hire Reason *Job Indicator Primary Job

Calculate Status and Dates

Position Number [] [] Current []

Override Position Data

Position Entry Date [] [31]

Position Management Record

*Regulatory Region USA [] [] United States

*Company [] []

*Business Unit 50100 [] [] VDOT Business Unit

*Department [] []

Department Entry Date [] [31]

*Location [] []

Establishment ID [] []

Date Created 10/10/2019

Last Start Date 10/10/2019

Expected Job End Date [] [31]

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Add Job Data: Work Location Tab

The **Effective Date** auto-populates from the personal data.

- The **Action** defaults to **Hire**
- Select the **Reason**. For this scenario, the employee is new so **First Job** is selected.
- Enter or select the **Position Number**. When you tab or click out of this field, the **Position Management Record** fields populate with the values from the position.

DO NOT click the **Override Position Data** button. This will keep future position data changes from updating job data.

Navigation: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person

Employee: Patricia Portal Empl ID: 00123123700 Empl Record: 0

Tabs: Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Work Location Details Find First 1 of 1 Last

*Effective Date: 10/10/2019 Go To Row: + -

Effective Sequence: 0 *Action: Hire Reason: First Job *Job Indicator: Primary Job

HR Status: Active Payroll Status: Active Current

Position Number: 20001561 Fin Svcs Mgr I Override Position Data

Position Entry Date: 10/10/2019 ☐ Position Management Record

Regulatory Region: USA United States

Company: DOT Virginia Dept of Transportatio

Business Unit: 50100 VDOT Business Unit

Department: 10014 Financial Planning

Department Entry Date: 10/10/2019

Location: 10 VDOT Central Office

Establishment ID: VDOT Virginia DOT Date Created: 10/10/2019

Last Start Date: 10/10/2019 Expected Job End Date:

Buttons: OK Cancel Apply

Footer: Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Add Job Data: Job Information Tab

- Click the **Job Information** tab. Do not manually enter anything here.
- The **Reports To** position number is populated from **Position Data**. You can view the approver's title, employee ID, and name here.
- If the **Reports To** field does not display the supervisor position number, employee ID, and name, research as appropriate to ensure the employee has an active supervisor.
- If further action is needed, you can leave and come back to the **Job Data** pages later.

Navigation: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person

Tabs: Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Patricia Portal Empl ID 00123123700
Employee Empl Record 0

Job Information Details Find First 1 of 1 Last [Go To Row](#)

Effective Date	10/10/2019	Action	Hire
Effective Sequence	0	Reason	First Job
HR Status	Active	Job Indicator	Primary Job
Payroll Status	Active		

Current

Job Code	19034	Fin Svcs Mgr I
Entry Date	10/10/2019	
Supervisor Level	Gen Admin Manager III	
Reports To	00003	
Regular/Temporary	Regular	Full/Part Full-Time
Empl Class	<input type="text"/>	*Officer Code <input type="text"/>
Regular Shift	Not Applicable	Shift Rate <input type="text"/>
		Shift Factor <input type="text"/>

Standard Hours

Standard Hours	40.00	Work Period	W Weekly
FTE	1.000000		

Contract Number

Contract Number	<input type="text"/>	Next Contract Number
Contract Type	<input type="text"/>	

USA

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

[OK](#) [Cancel](#) [Apply](#)

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Add Job Data: Payroll Tab

The **Job Labor** tab can be skipped as no data there is used at this time. Click the **Payroll** tab.

Select the appropriate **Pay Group**, **Tax Location Code**, and **Holiday Schedule**.

For salaried employees, select the **Absence Management Absence System**.

If absence eligibility group is **VSDP** (Virginia Sickness and Disability Program), no further action is necessary.

If the employee is not in the VSDP eligibility group:

- Uncheck the **Use Pay Group Eligibility** checkbox.
- Select the appropriate **Eligibility Group**.

For this scenario, the employee is VSDP and thus no further action is required in the **Absence Management System** section of the page.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Personal Information ▾ > Add a Person > Modify a Person

Work Location Job Information Job Labor **Payroll** Salary Plan Compensation

Patricia Portal Empl ID 00123123700
Employee Empl Record 0

Payroll Information ? Find First 1 of 1 Last

Effective Date 10/10/2019
Effective Sequence 0
HR Status Active
Payroll Status Active

Action Hire
Reason First Job
Job Indicator Primary Job

Current ☐

*Payroll System Payroll for North America
Absence System Absence Management

Payroll for North America ?

Pay Group SMS Semi-Monthly Salaried
Employee Type S Salaried
Tax Location Code COVA00 Common Wealth of Virginia
GL Pay Type
Combination Code

Holiday Schedule HOLSAL Sal.HolSch
FICA Status Subject
Edit ChartFields

Absence Management System

Pay Group SEMIMNTHLY Semi-Monthly Salaried AM

Setting

☒ Use Pay Group Eligibility
☒ Use Pay Group Rate Type
☒ Use Pay Group As Of Date

Eligibility Group
Exchange Rate Type
Use Rate As Of

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Add Job Data: Compensation Tab

The **Salary Plan** tab can be skipped as no data there is used at this time. Click on the **Compensation** tab.

Select the **Rate Code**.

Enter the **Comp Rate** in the appropriate format (annual for salaried or hourly for hourly).

Click the **Calculate Compensation** button to calculate the other rate formats.

Click the **Benefits Program Participation** link at the bottom of the page.

Navigation: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person

Tabs: Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Patricia Portal Empl ID 00123123700
Employee Empl Record 0

Compensation Details ? Find First 1 of 1 Last Go To Row

Effective Date 10/10/2019
Effective Sequence 0 Action Hire
HR Status Active Reason First Job
Payroll Status Active Job Indicator Primary Job Current

Compensation Rate 30,000.000000 *Frequency A Annual

▶ **Comparative Information** ?
▶ **Pay Rates** ?

Default Pay Components Contract Change Prorate Option

Pay Components ? Personalize | Find | [Grid Icon] First 1 of 1 Last

Amounts	Controls	Changes	Conversion	
*Rate Code	Seq	Comp Rate	Currency	Frequency
1 NAANNL	0	30,000.000000	USD	A

Calculate Compensation

Job Data Employment Data Earnings Distribution **Benefits Program Participation**

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Add Job Data: Compensation Tab (continued)

Navigation: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Patricia Portal Empl ID 00123123700
Employee Empl Record 0

Compensation Details ? Find First 1 of 1 Last

Effective Date 10/10/2019 Go To Row

Effective Sequence 0 Action Hire

HR Status Active Reason First Job

Payroll Status Active Job Indicator Primary Job

Current

Compensation Rate 30,000.000000 *Frequency A Annual

▶ **Comparative Information** ?

▶ **Pay Rates** ?

Default Pay Components Contract Change Prorate Option

Pay Components ? Personalize | Find | | First 1 of 1 Last

Amounts | Controls | Changes | Conversion |

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 NAANNL	0	30,000.000000	USD	A			

Calculate Compensation

Job Data Employment Data Earnings Distribution **Benefits Program Participation**

OK Cancel Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Add Job Data (continued)

Enter the **Effective Date**. This is the same as the hire date.

Select the **Benefit Program**.

Click the **Employment Data** link.

Navigation: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person

Benefit Program Participation

Patricia Portal Empl ID 00123123700
Employee Empl Record 0

Benefit Status ? Find First 1 of 1 Last

Benefit Record Number

Effective Date 10/10/2019

Effective Sequence 0 Action Hire

HR Status Active Reason First Job

Payroll Status Active Job Indicator Primary Job

*Benefits System Current

Annual Benefits Base Rate USD Benefits Employee Status Active

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1 Elig Fld 2 Elig Fld 3

Elig Fld 4 Elig Fld 5 Elig Fld 6

Elig Fld 7 Elig Fld 8 Elig Fld 9

Benefit Program Participation Details ? Find | View All First 1 of 1 Last

*Effective Date Currency Code

Benefit Program

Job Data **Employment Data** Earnings Distribution Benefits Program Participation

OK Cancel Apply



Add Job Data (continued)

The **Company Seniority Date** defaults to the hire date, but can be updated if the employee has credit for prior years of service. To override the **Company Seniority Date**, check the **Override** checkbox next to the field and enter the appropriate date as indicated by HR (calculated based on various PMIS fields).

Click the **OK** button to save all the **Job Data** information.

Navigation: Favorites > Main Menu > Workforce Administration > Personal Information > Add a Person > Modify a Person

Employment Information

Patricia Portal Empl ID 00123123700
Employee Empl Record 0

Organizational Instance ?

Organizational Instance Rcd 0	Original Start Date 10/10/2019	<input type="checkbox"/> Override
Last Start Date	First Start Date	
Termination Date	Years Months Days	
Org Instance Service Date 10/10/2019	<input type="checkbox"/> Override 0 0 0	

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date 10/10/2019	First Assignment Start 10/10/2019
Assignment End Date	
Home/Host Classification Home	Years Months Days Time Reporter Data
Company Seniority Date 10/10/2019	<input type="checkbox"/> Override 0 0 0
Benefits Service Date 10/10/2019	<input type="checkbox"/> Override 0 0 0
Seniority Pay Calc Date 10/10/2019	<input type="checkbox"/> Override 0 0 0
Probation Date [31]	
Professional Experience Date [31]	Last Verification Date [31]
Business Title Fin Svcs Mgr I	Position Phone

USA

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply



Add Job Data (continued)

A warning message like the one here displays.

Click the **OK** button.

The user is directed to the **Organizational Relationships** page. The employee has been successfully added in Cardinal.

Remember, when entering a new hire manually, the process must be completed to the end of job data entry. If not, the result will be a 'ghost' employee that exists in the database but cannot be viewed online.

Message

Warning -- You have updated job information that is relevant to compensation defaulting on job row 1. (1000,910)

You have updated job information that is relevant to compensation defaulting without updating the employee's compensation. If you would like to update the employee's compensation now based on the new information, then go to the Compensation page. You can select the Compensation Defaulting button in order to re-default any defaulted pay components. You can also manually adjust the pay components.

OK

Cancel

Favorites ▾Main Menu ▾> Workforce Administration ▾> Personal Information ▾> Add a Person > Modify a Person

Biographical DetailsContact InformationRegionalOrganizational Relationships

Patricia Portal

Person ID 00123123700

Choose Org Relationship to Add

☒ Employee

☐ Contingent Worker

☐ Person of Interest

Empl Record 0

Add Relationship

SaveNotifyRefreshAddUpdate/DisplayInclude HistoryCorrect History

Biographical Details | Contact Information | Regional | Organizational Relationships

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Verify Employee Information

The next step is to check the Position to verify the employee is assigned to it and that the Incumbent is checked.

Navigate to the **Add/Update Position Info** page using the following path:

Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info

On the **Find an Existing Value** tab, enter the position number in the **Position Number** field.

Click the **Search** button.

Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Add/Update Position Info

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

Position Number begins with ▾ 777777

Description begins with ▾

Position Status = ▾ ▾

Business Unit begins with ▾ 🔍

Department begins with ▾ 🔍

Job Code begins with ▾ 🔍

Reports To Position Number begins with ▾

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search 🔍 Save Search Criteria

Find an Existing Value | Add a New Value

Verify Employee Information (continued)

The **Description** page displays. Review the information for accuracy. If changes or additions are needed, click the **Correct History** button prior to making any changes.

Click the **Budget and Incumbents** tab.

Navigation: Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Tabs: Description | Specific Information | **Budget and Incumbents**

Position Information Find | View All First 1 of 1 Last

Position Number 77777
Headcount Status Filled
Current Head Count 1 out of 1
*Effective Date 02/02/2017
Reason NEW
*Status Active
*Position Status Approved
Status Date 02/02/2017
Action Date 02/02/2017
Key Position

Job Information

*Business Unit 50100 VDOT Business Unit
Job Code 19031 Fin Svcs Specialist I
*Reg/Temp Regular
*Regular Shift Not Applicable
Title Fin Svcs Specialist I
*Full/Part Time Full-Time
Union Code
Short Title Fin Svcs S Detailed Position Description

Work Location

*Reg Region USA United States
Department 10000 All Central Office Orgs
Location 10 VDOT Central Office
Reports To 00003 Gen Admin Manager III
Supervisor Lvl
Company DOT Virginia Dept of Transportation
Dot-Line
Security Clearance

Salary Plan Information

Salary Admin Plan
Standard Hours 40.00
Grade
Step
Work Period W Weekly
Mon 8.00 Tue 8.00 Wed 8.00 Thu 8.00 Fri 8.00 Sat Sun

USA

Updated on 02/02/2017 3:53:51PM Updated By JOHN.SMITH JOHN SMITH

Buttons: Save Return to Search Notify Add Update/Display Include History **Correct History**



Verify Employee Information (continued)

Confirm the correct employee is in the position.

Click the **Specific Information** tab.

Favorites ▾Main Menu ▾>Organizational Development ▾>Position Management ▾>Maintain Positions/Budgets ▾>Add/Update Position Info

DescriptionSpecific InformationBudget and Incumbents

Position Number 20001561

Headcount Status FilledCurrent Head Count 1 out of 1

Current Budget

Head Count	0	Current Budget FTE	0.00	Amount	0.000
------------	---	--------------------	------	--------	-------

Current Incumbents

Personalize | Find | 1 of 1

Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Name	Effective Date	Action	Action Reason	Override Position Data	Job Data
00123123700	0	Full-Time	40.00	Patricia Portal	10/10/2019	Hire	First Job	N	Job Data

SaveReturn to SearchNotifyAddUpdate/DisplayInclude HistoryCorrect History

Description | Specific Information | Budget and Incumbents



Update Incumbent

Click the **Correct History** button (if it was not clicked previously). The **Correct History** button is grayed out if it has been clicked.

Click the **Update Incumbents** checkbox.

Click the **Save** button.

Favorites ▾Main Menu ▾Organizational Development ▾Position Management ▾Maintain Positions/Budgets ▾Add/Update Position Info

DescriptionSpecific InformationBudget and Incumbents

Position Number 20001561
Headcount Status FilledCurrent Head Count 1 out of 1

Specific InformationFind | View AllFirst1 of 1Last
Effective Date 10/09/2019Status Active

Max Head Count1
Mail Drop ID
Work Phone
Health Certificate
Signature Authority

Incumbents

☒ Update Incumbents
☐ Include Salary Plan/Grade
☐ Force Update for Title Changes
☒ Budgeted Position
☐ Confidential Position
☐ Job Sharing Permitted
☐ Available for Telework

► Education and Government

SaveReturn to SearchNotifyAddUpdate/DisplayInclude HistoryCorrect History

Description | Specific Information | Budget and Incumbents

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Maintaining Reports To Approvers

Most position data is entered in PMIS and then interfaced into Cardinal. While the **Reports To** field information exists in PMIS, the interface does not currently update it in Cardinal, so it must be entered and maintained manually in Cardinal. The **Reports To** Position Number cannot be entered until the Position is created in Cardinal.

Reports To defines the reporting relationship for the position by identifying its related supervisory position number. The incumbent in the **Reports To** field in Cardinal is the person who will receive worklist items for the employee via workflow.

To review / update the **Reports To** for an employee, navigate to the **Description** tab using the following path:

Main Menu > Organizational Development > Position Management > Maintain Position/Budgets > Add/Update Position Info



Maintaining Reports To Approvers (continued)

Navigation: Favorites ▾ Main Menu ▾ > Organizational Development ▾ > Position Management ▾ > Maintain Positions/Budgets ▾ > Add/Update Position Info

Tab: Description | Specific Information | Budget and Incumbents

Position Information Find | View All First 1 of 1 Last

Position Number 777777
Headcount Status Filled Current Head Count 1 out of 1
*Effective Date 02/02/2017 *Status Active
Reason NEW New Position Action Date 02/02/2017
*Position Status Approved Status Date 02/02/2017 ☐ Key Position

Job Information

*Business Unit 50100 VDOT Business Unit
Job Code 19031 Fin Svcs Specialist I
*Reg/Temp Regular *Full/Part Time Full-Time
*Regular Shift Not Applicable Union Code
Title Fin Svcs Specialist I Short Title Fin Svcs S Detailed Position Description

Work Location

*Reg Region USA United States
Department 10000 All Central Office Orgs Company DOT Virginia Dept of Transportatio
Location 10 VDOT Central Office
Reports To 00003 Gen Admin Manager III Dot-Line
Supervisor Lvl Security Clearance

Salary Plan Information

Salary Admin Plan Grade Step
Standard Hours 40.00 Work Period W Weekly
Mon Tue Wed Thu Fri Sat Sun
8.00 8.00 8.00 8.00 8.00

USA

Updated on 02/06/2017 11:24:55AM Updated By JOHN.SMITH JOHN SMITH



Maintaining Reports To Approvers (continued)

To update the **Reports To**:

- Click the **Correct History** button.
- Update the **Reports To** field.
- Click the **Save** button.

A warning message displays asking if a batch process should be used to update incumbent data.

Click the **No** button, which means the incumbent's Job Data will be updated online within a few seconds.

Work Location

*Reg Region United States

Department All Central Office Orgs Company DOT Virginia Dept of Transportation

Location VDOT Central Office

Reports To Gen Admin Manager III Dot-Line

Supervisor Lvl Security Clearance

Salary Plan Information

Salary Admin Plan Grade Step

Standard Hours Work Period Weekly

Mon	Tue	Wed	Thu	Fri	Sat	Sun
<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text" value="8.00"/>	<input type="text" value=""/>	<input type="text" value=""/>

USA

Updated on 02/06/2017 11:41:55AM Updated By JOHN.SMITH JOHN SMITH

VDOT Business Unit

Message

This position has 1 incumbents. Do you wish to use a batch process to update incumbent data? (1000,997)

Batch processing is designed for high volume transactions. Please select 'Yes' if you wish to initiate a batch job to perform incumbent updates. If you select 'No' incumbent data will be updated online.



Maintaining Reports To Approvers

Go to the employee/incumbent Job Data to ensure **Reports To** position number is updated on the **Job Information** page and that supervisor ID and name is displayed.

Navigate to the employee's **Job Data** using the following path:

Main Menu > Workforce Administration > Job Information > Job Data

Enter the **Empl ID** and click the **Search** button.

Favorites ▾ Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

Job Data

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

Find an Existing Value

▼ Search Criteria

Empl ID begins with ▾ 00123456700

Empl Record = ▾

Name begins with ▾


Last Name begins with ▾

Second Last Name begins with ▾

Alternate Character Name begins with ▾

Middle Name begins with ▾

☐ Include History ☐ Correct History ☐ Case Sensitive

Search Clear Basic Search  Save Search Criteria



Maintaining Reports To Approvers (continued)

Click the **Job Information** tab to view the **Reports To** information.

If the Job Data of the employee/incumbent was not updated for any reason, it may be necessary to manually add a row on Job Data. Or, removing a position from Job Data may be required. Tab out of the field, and reenter the position number.

Remember that you must click the **Correct History** button to make any adjustments.

Favorites ▾Main Menu ▾ > Workforce Administration ▾ > Job Information ▾ > Job Data

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

SUE DOE
Employee

Empl ID 00123456700
Empl Record 0

Job Information ?FindFirst1 of 2Last

Effective Date 02/02/2017

Effective Sequence 1

HR Status Active

Payroll Status Active

Action Position Change

Reason New Position

Job Indicator Primary Job

Go To Row

Current

Job Code 19031

Fin Svcs Specialist I

Entry Date 02/02/2017

Supervisor Level

Reports To 00009Gen Admin Manager III 00196812900 JOHN DOE

Regular/Temporary Regular

Full/Part Full-Time

Empl Class

*Officer Code None

Regular Shift Not Applicable

Shift Rate

Shift Factor

Standard Hours ?

Standard Hours 40.00

FTE 1.000000

Work Period W Weekly

Contract Number ?

Contract Number

Contract Type

Next Contract Number

USA

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

SaveReturn to SearchNotifyRefresh

Update/DisplayInclude HistoryCorrect History



Actions for Specific Scenarios

The following are the types of Cardinal manual updates potentially required after the PMIS interface for each different scenario to complete the employee setup process. These steps require manual action even if the PMIS interface successfully added the position, personal, and job data in Cardinal.

- **New hire or Rehire:**
 - Reports To
 - Time Reporter
 - Hourly Contract Data
 - Work Schedule
 - Compensatory & Overtime Leave Plan
- **Termination or Death:**
 - Time Reporter
- **Change in position:**
 - Reports To
- **Switching pay** groups from salaried to hourly (or vice versa):
 - Reports To
 - Time Reporter
 - Hourly Contract Data
 - Work Schedule
 - Compensatory & Overtime Leave Plan



Lesson 2: Summary

2

Creating and Maintaining Position, Personal, and Job Data

In this lesson, you learned:

- Position, personal, and job (employee) data are entered into PMIS and then uploaded into Cardinal.
- Cardinal contains employee personal biographical data such as name and address. Cardinal does not include information such as marital status, gender, and Social Security Number.
- A position must exist in Cardinal for any employee you add.
- If position, personal, and job (employee) data are manually entered into Cardinal, you must also ensure that this information is entered into PMIS. Data in PMIS and Cardinal must match and the data entry into PMIS should be done the same day.
- An employee is established in Cardinal by setting up the job (employee) data. Job data will include information regarding work location (such as Department, Location), job information (such as Reports To), Payroll (such as Payroll System, Absence System), and Compensation (such as Compensation Rate, Frequency).



Lesson 3: Introduction

3

Enrolling and Maintaining Time Reporters and Compensatory Leave Plans

This lesson covers the following topics:

- Enrolling and Maintaining Time Reporters
- Enrolling and Maintaining Compensatory and Overtime Leave Plans



Enrolling Time Reporters

In order for Cardinal to record and allocate labor costs, an employee must be set up as a **Time Reporter**. The **Create Time Reporter Data** page is used to enroll employees as Time Reporters.

Navigate to the **Create Time Reporter Data** page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Time and Labor > Enroll Time Reporters > Create Time Reporter Data

Click in the **Empl ID** field, enter the Employee ID information and then click on the **Search** button.



Enrolling Time Reporters (continued)

Enter information on the **Create Time Reporter Data** page:

- **Payable Time Start Date** - Same as Effective Date.
- **Effective Date** - Enter the date the employee should begin reporting time.
- **Status** - Keep the default value of **Active**
- **Time Reporter Type** - Keep the default value of **Elapsed Time Reporter**.
- **Workgroup** - Select the appropriate workgroup for the employee.
- **Taskgroup** - Choose the only value available **VDOTCOMREQ**.
- **Rule Element 1** - Field is used to designate if an employee pays commuter tax. If so, input **COMMUTER** otherwise, should be left blank.
- **Time Zone** - Defaults to **EST** (Eastern Time).
- **Send Time to Payroll** - Checkbox should be checked.

Create Time Reporter Data

SUE DOE ID 00123456700 Employment Record 0

Organizational Relationship Employee Badge Detail

Payable Time Start Date 02/02/2017

Time Reporter Data Find | View All First 1 of 1 Last

*Effective Date 02/02/2017

*Time Reporter Type Elapsed Time Reporter

Elapsed Time Template

Punch Time Template

Time Period ID

Workgroup VDOTNONEXM VDOT Salaried Non Exempt

Taskgroup VDOTCOMREQ TSKGRP Combo Codes Required

Task Profile ID

TCD Group

Restriction Profile ID

Rule Element 1

Rule Element 2

Rule Element 3

Rule Element 4

Rule Element 5

Time Zone EST Eastern Time (US)

*Status Active

Payroll

☒ Send Time to Payroll

Commitment Accounting

☐ For Taskgroup

☐ For Department

Save Return to Search Notify Refresh



Enrolling Time Reporters (continued)

Time and Labor > Enroll Time Reporters > Create Time Reporter Data

Create Time Reporter Data

SUE DOE

Organizational Relationship Employee

Payable Time Start Date 02/02/2017

ID 00123456700

Employment Record 0

Badge Detail

Time Reporter Data

***Effective Date** 02/02/2017

***Time Reporter Type** Elapsed Time Reporter

Elapsed Time Template

Punch Time Template

Time Period ID

***Workgroup** VDOTNONEXM VDOT Salaried Non Exempt

***Taskgroup** VDOTCOMREQ TSKGRP Combo Codes Required

Task Profile ID

TCD Group

Restriction Profile ID

Rule Element 1

Rule Element 2

Rule Element 3

Rule Element 4

Rule Element 5

Time Zone EST Eastern Time (US)

Find | View All

First 1 of 1 Last

***Status** Active

Payroll

☒ Send Time to Payroll

Commitment Accounting

☐ For Taskgroup

☐ For Department

Save

Return to Search

Notify

Refresh



Enrolling Time Reporters (continued)

Hourly employees have a **Contract Hours** section on the page which includes:

- **Hourly Contract Hours** - The total number hours permitted by the employee's contract. (If contract hours are 1500, enter 1400 instead.)
- **Contract Start Date** - Enter May 1st of the contract year, which is the standard begin date for new contract hires.
- **Contract End Date** - Enter April 30th of the contract year, which is the standard end date for new contract hires.

Click on the **Save** button.

The employee is now enrolled as a Time Reporter in Cardinal and is able to access the **Timesheet** page.

Navigation: Favorites ▾ Main Menu ▾ > Time and Labor ▾ > Enroll Time Reporters ▾ > Create Time Reporter Data

Create Time Reporter Data

KYLE DOE ID 0011111100 Employment Record 0
Organizational Relationship Employee [Badge Detail](#)
Payable Time Start Date 05/01/2017

Time Reporter Data Find | View All First 1 of 1 Last

*Effective Date 05/01/2017 *Status Active
*Time Reporter Type Elapsed Time Reporter
Elapsed Time Template
Punch Time Template
Time Period ID
*Workgroup VDOTHRLY VDOT Hourly Employees
*Taskgroup VDOTCOMREQ TSKGRP Combo Codes Required
Task Profile ID
TCD Group
Restriction Profile ID
Rule Element 1
Rule Element 2
Rule Element 3
Rule Element 4
Rule Element 5
Time Zone EST Eastern Time (US)

Payroll
☒ Send Time to Payroll

Commitment Accounting
☐ For Taskgroup
☐ For Department

Contract Hours

Hourly Contract Hours 1400.000000
Start Date 05/01/2017
End Date 04/30/2018

Save Return to Search Notify Refresh



Maintaining Time Reporters

When to update Time Reporter data:

Employee Job Data Updates

Employee changes may require updates to their information. Changes to employee job data can affect the Workgroup (e.g., an hourly employee moving to a salaried position). Pay attention to the effective date; in most cases, a new effective dated row should be added to change an employee's workgroup. You only want to correct the workgroup on the existing row if the workgroup was previously incorrect and needs to be corrected for that effective date.

Inactive Employees

When PMIS terminates an employee on Job Data, the Job Data status automatically becomes inactive. There is no manual update on Job Data required to process a terminated employee's time. This is because they can continue to report / process time if they are an active Time Reporter. When all time has been processed / paid out, Time Reporter status needs to be inactivated.

Do not change the Time Reporter status to **Inactive** until the employee no longer needs to report time. Inactive employees can only be paid for time worked prior to their status being changed to Inactive. They cannot enter or be paid for time worked after the inactive effective date.

Maintaining Time Reporters (continued)

New Hourly Contract Year

A new effective dated row needs to be added to each hourly employee's Time Reporter data for each new contract year to reflect the contract hours for the new year.

To update Time Reporter data, go to the **Maintain Time Reporter Data** page.

Navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Time & Labor > Enroll Time Reporters > Maintain Time Reporter Data

Navigation: Favorites > Main Menu > Time and Labor > Enroll Time Reporters > Maintain Time Reporter Data

Maintain Time Reporter Data

KYLE DOE ID 00111111100 Employment Record 0

Organizational Relationship Employee Badge Detail Group Membership

Time Reporter Data Find | View All First 1 of 1 Last

*Effective Date 05/01/2017 *Status Active

*Time Reporter Type Elapsed Time Reporter

Elapsed Time Template

Punch Time Template

Time Period ID

*Workgroup VDOTHRLY VDOT Hourly Employees

*Taskgroup VDOTCOMREQ TSKGRP Combo Codes Required

Task Profile ID

TCD Group

Restriction Profile ID

Rule Element 1

Rule Element 2

Rule Element 3

Rule Element 4

Rule Element 5

Time Zone EST Eastern Time (US)

Payroll

☒ Send Time to Payroll

Commitment Accounting

☐ For Taskgroup

☐ For Department

Contract Hours

Hourly Contract Hours 1400.000000

Start Date 05/01/2017

End Date 04/30/2018

Buttons: Save Return to Search Notify Refresh Update/Display Include History Correct History



Maintaining Time Reporters (continued)

Search for the employee. The **Maintain Time Reporter Data** page displays once the search is completed.

These fields are the only ones used in Cardinal:

- **Effective Date** - This should be the effective date of the change.
- **Status** - Options are either **Active** or **Inactive**.
- **Time Reporter Type**: Defaults to **Elapsed Time Reporter** (do not change this field).
- **Workgroup** - Select the appropriate workgroup for the employee.
- **Taskgroup** - Only one – **VDOTCOMREQ**.
- **Rule Element 1**: Field is used to designate if an employee pays commuter tax. If so, input **COMMUTER** otherwise, should be left blank.
- **Time Zone** - Defaults to EST (Eastern Time).
- **Send Time to Payroll** - Checkbox should be checked.

Hourly employees have a **Contract Hours** section on the page.

Maintain Time Reporter Data

KYLE DOE ID 00111111100 Employment Record 0

Organizational Relationship Employee Badge Detail Group Membership

Time Reporter Data Find | View All First 1 of 1 Last

*Effective Date 05/01/2017

*Time Reporter Type Elapsed Time Reporter

Elapsed Time Template

Punch Time Template

Time Period ID

*Workgroup VDOTHRLY

*Taskgroup VDOTCOMREQ

Task Profile ID

TCD Group

Restriction Profile ID

Rule Element 1

Rule Element 2

Rule Element 3

Rule Element 4

Rule Element 5

Time Zone EST Eastern Time (US)

Status Active

Payroll

☒ Send Time to Payroll

Commitment Accounting

☐ For Taskgroup

☐ For Department

Contract Hours

Hourly Contract Hours 1400.000000

Start Date 05/01/2017

End Date 04/20/2018

VDOT Hourly Employees

TSKGRP Combo Codes Required

Save Return to Search Notify Refresh Update/Display Include History Correct History



Maintaining Time Reporters (continued)

Favorites ▾ | Main Menu ▾ > Time and Labor ▾ > Enroll Time Reporters ▾ > Maintain Time Reporter Data

Maintain Time Reporter Data

KYLE DOE ID 00111111100 Employment Record 0
Organizational Relationship Employee Badge Detail Group Membership

Time Reporter Data Find | View All First 1 of 1 Last

***Effective Date** 05/01/2017 [📅] [↺] [↻]

***Time Reporter Type** Elapsed Time Reporter ▾

Elapsed Time Template [🔍]

Punch Time Template [🔍]

Time Period ID [🔍]

***Workgroup** VDOTHRLY [🔍] VDOT Hourly Employees

***Taskgroup** VDOTCOMREQ [🔍] [↺] [↻] TSKGRP Combo Codes Required

Task Profile ID [🔍]

TCD Group [🔍]

Restriction Profile ID [🔍]

Rule Element 1 [🔍]

Rule Element 2 [🔍]

Rule Element 3 [🔍]

Rule Element 4 [🔍]

Rule Element 5 [🔍]

Time Zone EST [🔍] Eastern Time (US)

***Status** Active ▾ [⊕] [⊖]

Payroll

☒ Send Time to Payroll

Commitment Accounting

☐ For Taskgroup

☐ For Department

Contract Hours

Hourly Contract Hours 1400.000000

Start Date 05/01/2017 [📅]

End Date 04/20/2018 [📅]

Save Return to Search Notify Refresh Update/Display Include History Correct History



Maintaining Time Reporters (continued)

To update **Time Reporter Data**:

- Click **+** to add a new row.
- Update the **Effective Date** field.
- To update the Time Reporter's **Workgroup**, click on the **Lookup** icon next to the **Workgroup** field and select the appropriate group.

Hourly employees have a **Contract Hours** section on the **Maintain Time Reporter Data** page.

- **Hourly Contract Hours** - the total number hours permitted by the employee's contract. (If contract hours are 1500, enter 1400 instead.)
- **Contract Start Date** - Enter the standard May 1st of the contract year begin even for new hires.
- **Contract End Date** - Enter the standard April 30th of the contract year end even for new hires.

Enter the necessary changes and then click on the **Save** button. The Time Reporter Data is then successfully updated.



Enrolling in Compensatory and Overtime Leave Plans

Employees must be enrolled in the Compensatory Leave / Overtime Leave Plan in order to earn and take the specific type(s) of leave. Hourly employees are not eligible for compensatory or overtime leave.

To access the **Comp Plan Enrollment** page, navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Time & Labor > Enroll Time Reporters > Comp Plan Enrollment

Enter the Employee ID in the **Empl ID** field and click the **Search** button.

The screenshot displays the 'Comp Plan Enrollment' web interface. At the top, a breadcrumb trail reads: 'Favorites > Main Menu > Time and Labor > Enroll Time Reporters > Comp Plan Enrollment'. Below this, the title 'Comp Plan Enrollment' is followed by the instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' A button labeled 'Find an Existing Value' is present. Under a 'Search Criteria' section, the 'Empl ID' field is set to 'begins with' and contains the value '00123456700'. The 'Empl Record' field is set to '='. The 'Name' field is set to 'begins with'. There are checkboxes for 'Correct History' and 'Case Sensitive', both of which are currently unchecked. At the bottom, the 'Search' button is highlighted with a red box, along with 'Clear', 'Basic Search', and 'Save Search Criteria' options.



Enrolling in Compensatory and Overtime Leave Plans (continued)

On the **Compensatory Plan Enrollment** page:

- The **Effective Date** defaults to the current date. If this is incorrect, enter or select the correct date for the employee's enrollment.
- Select the **Compensatory Time Off Plan**. All salaried employees should be enrolled in a compensatory leave plan and only employees in the workgroup eligible for overtime leave should be enrolled in the overtime leave plan.
- Click the **Save** button.

Favorites ▾Main Menu ▾>Time and Labor ▾>Enroll Time Reporters ▾>Comp Plan Enrollment

Compensatory Plan Enrollment

SUE DOE

Empl ID 00123456700

Empl Record 0

Comp Plan Enrollment

Find | View AllFirst1 of 1Last

*Effective Date02/02/2017

+ -

Valid Comp Time Off Plans for Time Reporter

Personalize | Find | View All |

First1 of 1Last

*Compensatory Time Off Plan	Description	*Status	
COMP_LEAVE	Compensatory Leave Plan	Active	+ -

Save

Return to Search

Notify

Refresh

Include History

Correct History



Maintaining Compensatory and Overtime Leave Plans

When to update Compensatory and Overtime Leave Plans:

Employee Job Data Updates

Employee changes may require updates to their information. Changes to employee job data can affect the Workgroup (e.g., an hourly employee moving to a salaried position). If an employee is changed to a workgroup eligible for overtime leave, the employee must be enrolled in the overtime leave plan by adding a new effective dated row that includes both the **Overtime Leave** and **Compensatory Leave Plan** (if compensatory leave is applicable).

Even if the employee was previously enrolled in only the Compensatory Leave Plan, that plan will not automatically carry forward to the new row. If an employee moves out of a workgroup eligible for overtime leave, inactivate the overtime leave plan for the employee by either adding a new effective dated row to inactivate the plans or add a new row that only includes the Compensatory Leave Plan, if employee is still eligible.

Rehired Employees

When an employee is rehired, verify that the compensatory and overtime leave plan enrollment is correct or enroll / inactivate as needed if the employee is in a different workgroup than when they were previously employed.

To update Compensatory and Overtime Leave Plans, go to the **Comp Plan Enrollment** page.

Navigate to this page using the following path:

Cardinal FIN> Cardinal HCM > Main Menu > Time & Labor > Enroll Time Reporters > Comp Plan Enrollment



Maintaining Compensatory and Overtime Leave Plans (continued)

To update Compensatory or Overtime Leave Plans:

- Click **+** to add a new row.
- Update the **Effective Date** field.
- Update the **Status** field.
- Add or remove the plan as needed.

Enter the necessary changes and then click on the **Save** button.

Favorites ▾Main Menu ▾> Time and Labor ▾> Enroll Time Reporters ▾> Comp Plan Enrollment

Compensatory Plan Enrollment

JOHN DOE

Empl ID 00130011800

Empl Record 0

Comp Plan Enrollment

Find | View AllFirst1 of 2Last

*Effective Date02/06/2017

+

-

Valid Comp Time Off Plans for Time Reporter

Personalize | Find | View All |

First1 of 1Last

*Compensatory Time Off Plan	Description	*Status		
COMP_LEAVE	Compensatory Leave Plan	Inactive	+	-

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Include History

Correct History



Lesson 3: Summary

3

Enrolling and Maintaining Time Reporters and Compensatory Leave Plans

In this lesson, you learned:

- In order for Cardinal to record and allocate payroll costs, an employee must be set up as a Time Reporter. The **Create Time Reporter Data** page is used to enroll employees as Time Reporters.
- If an employee becomes inactive (e.g., retirement, separation, seasonal), the Time Reporter status is changed to **Inactive** only after all time has been submitted for the employee and has been processed.
- You can search for the employee by name or Employee ID. However, searching by name may yield multiple employees. Employee ID returns one employee.
- Hourly employees have a contract hours section on the **Maintaining Time Reporter Data** page.
- Employees must be enrolled in the **Compensatory Leave Plan** and **Overtime Leave Plan** in order to accrue and take those leave types.



Lesson 4: Introduction

4

Managing Work Schedules

This lesson covers the following topics:

- Assigning and Updating Work Schedules



Assigning and Updating Work Schedules

Each employee must have a work schedule that is effective dated in Cardinal. Assigning an employee to a work schedule(s) is done manually.

Hourly employees are assigned a work schedule with zero hours. The name of the schedule is **None**.

Salaried employees are assigned a pre-defined work schedule that matches the days of the week and number of hours they are scheduled to work.

Schedule Configuration

Schedules can be weekly, bi-weekly, rotating, and flexible. Supervisors and Administrators can add new work schedules for employees. Only Payroll Administrators can correct the schedule.



Assigning and Updating Work Schedules (continued)

Manage Work Schedules

It is important that a salaried employee's work schedule be accurate as it impacts the employee's leave balances, time processing, and overtime pay eligibility:

- Cardinal business rules validate hours reported on an employee's timesheet against their schedule and identifies exceptions if they do not match.
- When an absence request is entered for a full day or crosses multiple days, holidays, weekends, etc., an employee's schedule is used to calculate how many actual leave hours are being taken.
- Cardinal uses an employee's work schedule to determine the eligibility for any overtime entered on a timesheet.

Updating Work Schedules

When an employee's schedule changes:

- An Employee Setup Administrator or Time & Attendance Approver can update the employee's schedule by adding a new effective dated row.
- The schedule updates are normally entered by the employee's supervisor.
- The employee schedule updates are effective dated to retain historical records.



Assigning and Updating Work Schedules (continued)

To add or change an employee's schedule, navigate to the **Assign Work Schedule** (search) page.

Navigate to this page using the following path:

Cardinal FIN > Cardinal HCM > Main Menu > Time & Labor > Enroll Time Reporters > Assign Work Schedule

Enter the **Employee ID** or **Name** and then click the **Search** button. Select the appropriate employee to make the schedule change.

Favorites ▾ Main Menu ▾ > Time and Labor ▾ > Enroll Time Reporters ▾ > Assign Work Schedule

Assign Work Schedule

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

[Find an Existing Value](#)

▼ Search Criteria

Empl ID begins with ▾ 00123456700

Empl Record = ▾

Name begins with ▾

Last Name begins with ▾

Business Unit begins with ▾

Department begins with ▾

Organizational Relationship = ▾

☒ Include History ☐ Correct History ☐ Case Sensitive

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



Assigning a Work Schedule for a New Employee

Enter the **Effective Date**, which should match the employee's hire date.

For the **Assignment Method** from the drop-down list select the value **Select Predefined Schedule**.

Select the appropriate **Schedule ID**. In this scenario, the **5-DAY** schedule is selected.

Click the **Save** button.

Favorites ▾Main Menu ▾> Time and Labor ▾> Enroll Time Reporters ▾> Assign Work Schedule

Assign Work Schedule

SUE DOE
Fin Svcs Specialist I
Actions ▾

Employee ID 00123456700
Employment Record 0

Assign Schedules ?

Personalize | Find | View All | First 1 of 1 Last

Details

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule		
02/02/2017	Select Predefined Schedule ▾	VDOT	5-DAY	Standard 40 hr Work Wk	Show Schedule		

▶ View history of Schedule Assignments, including default changes

Save

Return to Search

Refresh

Update/Display

Include History

Correct History



Updating Work Schedules

To update a schedule follow these steps:

- Click on the **[+]** button to add a new row.
- Click in the **Effective Date** field and insert the effective (start) date that the schedule was in effect (this can be past, present, or future).
- The **Assignment Method** field defaults to **Select Predefined Schedule**. Do not change it.
- Click in the **Schedule ID** field and select the ID for the new schedule.
- Click the **Save** button to save your changes.

It is best practice to start a new schedule on a Monday's date, since all schedules have their week defined as Monday to Sunday.

Favorites ▾Main Menu ▾Time and Labor ▾Enroll Time Reporters ▾Assign Work Schedule

Assign Work Schedule

JOHN DOE
Transportation Operator II

Employee ID 00130240100
Employment Record 0

Actions ▾

Assign Schedules ?

Personalize | Find | View All | First 1-2 of 2 Last

Primary Schedule

Alternate Schedule

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule	
02/06/2017	Select Predefined Schedule ▾	VDOT	40-MT	40 hours off on Monday & Tues	Show Schedule	<div> </div>
04/25/2016	Select Predefined Schedule ▾	VDOT	5-DAY	Standard 40 hr Work Wk	Show Schedule	<div> </div>

▶ View history of Schedule Assignments, including default changes

Save

Return to Search

Previous in List

Next in List

Refresh

Update/Display

Include History

Correct History

Updating Work Schedules (continued)

Favorites ▾Main Menu ▾> Time and Labor ▾> Enroll Time Reporters ▾> Assign Work Schedule

Assign Work Schedule

JOHN DOE



Transportation Operator II

Employee ID 00130240100


Employment Record 0











Actions ▾

Assign Schedules ?



Personalize | Find | View All |   First 1-2 of 2 Last

Primary Schedule


Alternate Schedule 

*Effective Date	*Assignment Method	Schedule Group	Schedule ID	Description	Show Schedule		
02/06/2017 	Select Predefined Schedule ▾	VDOT 	40-MT 	40 hours off on Monday & Tues	Show Schedule		
04/25/2016 	Select Predefined Schedule ▾	VDOT 	5-DAY 	Standard 40 hr Work Wk	Show Schedule		


▼ View history of Schedule Assignments, including default changes


Personalize | Find |   First 1-2 of 2 Last


Primary Assignment History


Alternate Assignment History 


Effective Date	Assignment Method	Schedule Group	Schedule ID	Description
02/06/2017	Predefined Schedule	VDOT	40-MT	40 hours off on Monday & Tues
04/25/2016	Predefined Schedule	VDOT	5-DAY	Standard 40 hr Work Wk


 Save


 Return to Search


 Previous in List

 Next in List

 Refresh

 Update/Display

 Include History

 Correct History



Lesson 4: Summary

4

Managing Work Schedules

In this lesson, you learned:

- How to enter an employee as a Time Reporter
- How to set up compensatory and overtime leave
- How to enter / update employee work schedules



Lesson 5: Time & Attendance Administration Hands-on Practice

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Course Summary

TA363

Time and Attendance Administration

In this course, you learned:

- Create and maintain position, personal, and job data
- Enroll and maintain Time Reporters and compensatory leave plans
- Manage work schedules



Course Evaluation

Congratulations! You successfully completed the **501 TA363: Time and Attendance Administration** course.

Your instructor will provide instructions on how to access the evaluation survey for this course.





Appendix

- Key Terms
- Flowchart Key



Key Terms: Absence Management

Absence Entitlement: The hours or days of leave an employee has accrued for an absence type (e.g., Vacation, VSDP Sick, VSDP Personal).

Absence Event: The consecutive period of time an employee is absent for the same reason (e.g., Vacation, VSDP Sick, VSDP Personal).

Absence Name: The name given to a specific type of absence (e.g., Vacation, VSDP Sick, VSDP Personal).

Absence Reason: The additional classification of the absence type for an absence event. For example Jury Duty (absence reason) is a possible classification for Civil and Work-Related Leave (absence type).

Absence Take: The number of hours deleted from an employee's leave balance for a specific absence event.

Accrual Periods: The time periods by which employees earn leave (e.g., a pay period for Vacation, a leave year for VSDP Personal).



Key Terms: Timesheet Entry

Adjustment: A manually entered increase or decrease to an entitlement balance.

Business Unit: Identifies an operational subset of an organization. In Virginia, each state agency is an operational subset (or business unit) of the Commonwealth. The business unit number identifies each operational subset or agency of the Commonwealth. For example, VDOT is agency 50100.

ChartFields: A field on the Chart of Accounts represents one category of data (e.g., Business Unit, Department, Account, Fund, Program) and uses various values to further define that data. A combination of ChartFields defines an accounting distribution used in the creation of journal entries.

Compensatory Time Plan: Field that identifies employee eligibility for earned time off in lieu of paid overtime. This includes Compensatory Leave Plan and Overtime Leave Plan.

Entitlement Balance: The number of hours of unused entitlement for a particular absence type (e.g., Vacation, VSDP Sick, VSDP Personal).

Job Data: Information about the employee's position, department, job code, and compensation.

Location: Field that defines the employee's District or Central Office work location.



Key Terms: Timesheet Entry

Payable Time: In Human Capital Management (HCM), hours that are successfully processed through Time Administration and sent to the employee's supervisor for approval.

Personal Data: An employee's biographical information such as name, address, Employee ID, etc. In Cardinal, it does not include the employee's Social Security Number.

Personnel Management Information System (PMIS): Used to create a new position or edit position information when first entered into PMIS. PMIS then sends the information to Cardinal to establish Position Data in Cardinal Time & Attendance.

Position Data: Information about a position, including **Department ID** and **Reports To** information.

Reported Time: In HCM application, hours recorded on a timesheet and either saved or submitted, but not yet processed through the Time Administration batch process.

Reports To: Field that associates position to its supervisory position number.

Self Service User / Time Reporter: An employee who reports time on a Cardinal Timesheet.

SpeedTypes: Automatically populate some ChartFields on a transaction. Additional fields (e.g., Account) must be entered manually to successfully submit time.

Submitted Time: In the HCM application, time that is reported and submitted to Time Administration for batch processing.



Key Terms: Timesheet Entry

Taskgroup: All VDOT employees are in the same taskgroup i.e., **VDOTCOMREQ**. This taskgroup of employees requires the same fields be available on a timesheet for time reporting.

TRC: Time Reporting Code. Classifies hours recorded on the timesheet, e.g., Regular (RGS), Overtime (OT1, EOT, etc.), Compensatory Leave (CPE).

User Field 1: This provides the ability to associate an accounting entry to a time entry. This value is the run date identifying when the accounting information was sent to General Ledger and Project Accounting.

User Field 2: Payroll Run ID that designates the employee timesheet data has been included (added) to the payroll data for that specific payroll period. The data has been extracted and sent to CIPPS for payroll processing.

User Field 3: Payroll Run ID that designates the employee timesheet data has been allocated for that specific payroll period.

Work Schedule: The days and hours an employee is scheduled to work. Cardinal uses work schedules to validate time and calculate absences.





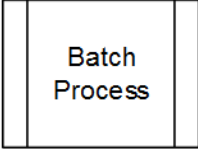
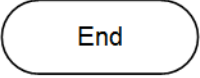
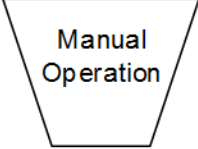
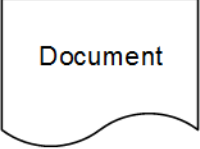
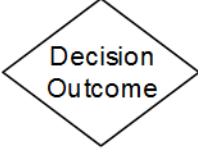
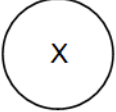
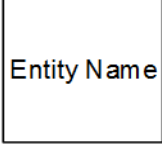
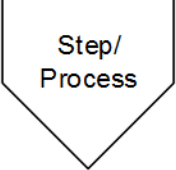
Key Terms: Time & Labor

Workgroup: A group of Time Reporters who share the same Time Reporting Rules and Time Reporting Codes. All Time Reporters must have a valid workgroup. VDOT's Workgroups are:

- **VAPEXCEPT:** VDOT Executives – No Approval
- **VAPEXTPB4:** VDOT EXTPB4 – No Approval
- **VAPEXTPB5:** VDOT EXTPB5 – No Approval
- **VDOTEMHRLY:** VDOT Emergency Hourly
- **VDOT EXCEPT:** VDOT Executive
- **VDOTEXTPB4:** Salaried Exempt Pay Band 4
- **VDOTEXTPB5:** Salaried Exempt Pay Band 5 & above
- **VDOTHRLY:** VDOT Hourly Employees
- **VDOTNOEXOT:** VDOT Salaried Non Exempt OT Lv
- **VDOTNONEXM :** VDOT Salaried Non Exempt



Flowchart Key

	Depicts a process step or interface.		Indicates point at which the process begins. Does not represent any activity.
	Specifies a batch process.		Indicates point at which the process ends. Does not represent any activity.
	Depicts a process step that is preformed manually.		Depicts a document of any kind, either electronic or hard copy.
	Defines the possible outcomes of a decision or analysis that took place in a step immediately preceding.		Indicates an on-page or intra process connector. Used to avoid complex overlapping connector lines or to continue a process on a subsequent page.
	Represents an entity (person, organization, etc.).		Connects steps between business processes.