



**HR351**  
**Cardinal Employee Data Setup  
and Maintenance**

**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.

The following Human Capital Management (HCM) training materials are located on the Cardinal website ([www.cardinalproject.virginia.gov](http://www.cardinalproject.virginia.gov)) under **Learning**.

- Job Aids on topics across all functional areas
- Functional process and instructional videos

The **Cardinal HCM Human Resources Reports Catalog** is located on the Cardinal website under **Resources**.

The system screenshots included in the Cardinal HCM training courses 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:

- ✓ Explain how the Cardinal HCM functional areas work together
- ✓ Add, clone, and maintain a position
- ✓ Hire an employee online
- ✓ Enter job data updates (transfers, leaves, separations)
- ✓ Review the mass upload options
- ✓ Enter Additional Pay and Rewards & Recognition



# Course Objectives

After completing this course, you will be able to:

- ✓ Access the HCM Human Resources Reports Catalog
- ✓ Run a Report
- ✓ Run a Query
- ✓ Enter and maintain Disciplinary Actions
- ✓ Enter and maintain Performance Ratings



# Agenda

1

Overview of Cardinal HCM

2

Human Resources Data Types

3

Managing Position Data

4

Managing Employee Personal Data

5

Managing Employee Job Data

6

Managing Job Data Updates



# Agenda

7

Managing Additional Pay and Rewards & Recognitions

8

Running Reports and Queries

9

Managing Additional HR Data for VPA Covered Employees



# Lesson

1

## Overview of Cardinal HCM

This lesson covers the following topics:

- What is Cardinal?
- Cardinal Integration
- The importance of Effective Dates



# Overview of Cardinal HCM

Cardinal provides better access to essential business functions and improved single sign-on technology.

The Cardinal system is comprised of three applications: Human Capital Management (HCM), Financials (FIN), and Business Intelligence (BI).



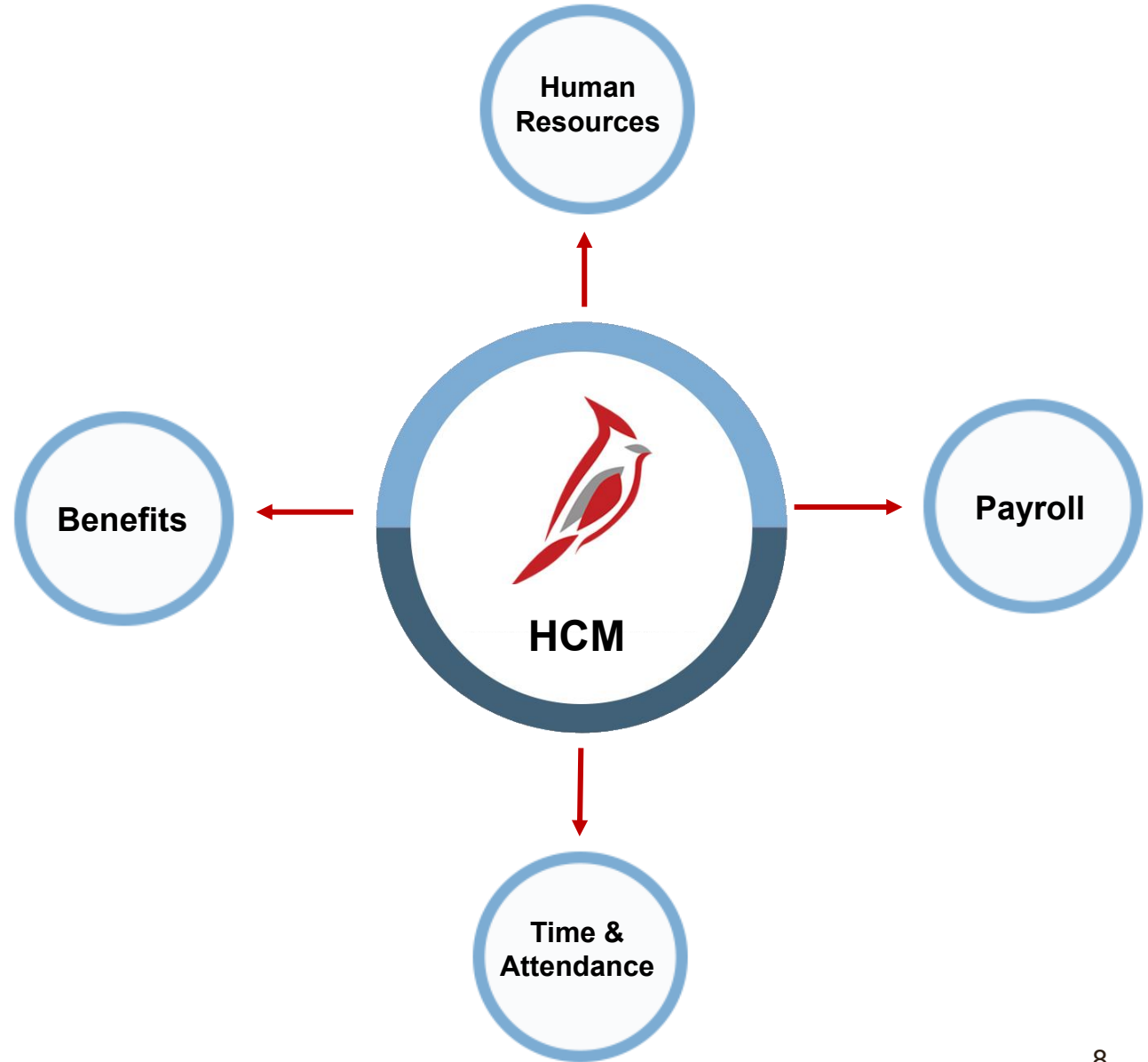




# Cardinal Human Capital Management (HCM)

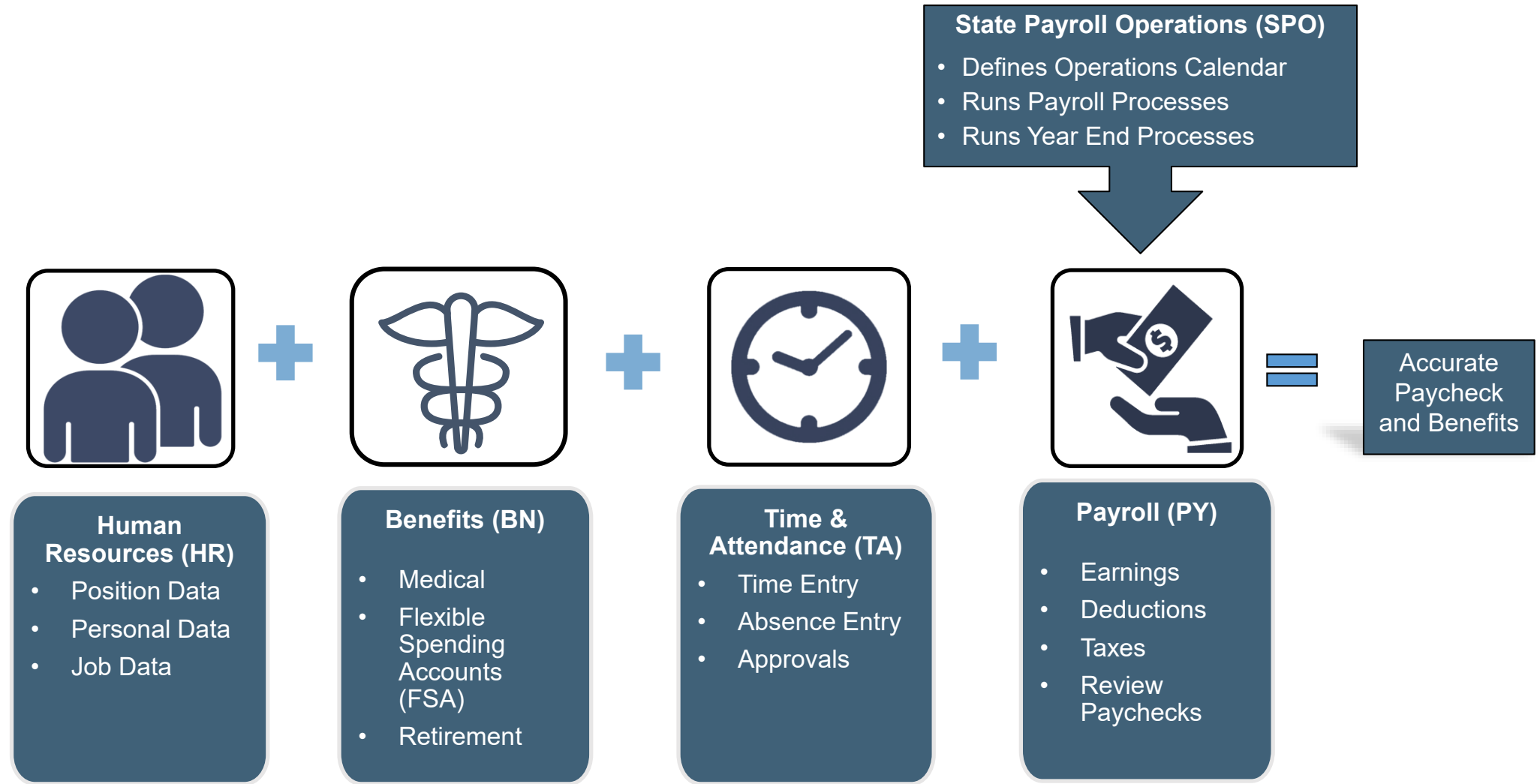
In Cardinal HCM, HR Administrators, BN Administrators, TL Administrators, Payroll Administrators, and State Payroll Operations (SPO) work together so that all employees are paid on time and accurately and are benefited properly.

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





# Cardinal HCM Responsibilities and Relationships





# Overview of the Human Resources Functionality

The Human Resources (HR) functional area contains all employee HR data related to the employee lifecycle. HR data feeds into and supports all the other HCM functional areas. Cardinal allows for HR data to be entered online or interfaced.

HR consists of three main data types:

## Position Data

- Job Code
- Department
- Location
- Reports To
- Supervisor
- Telework Eligibility

## Personal Data

- Name
- Date of Birth
- SSN
- Address
- Gender
- Email address

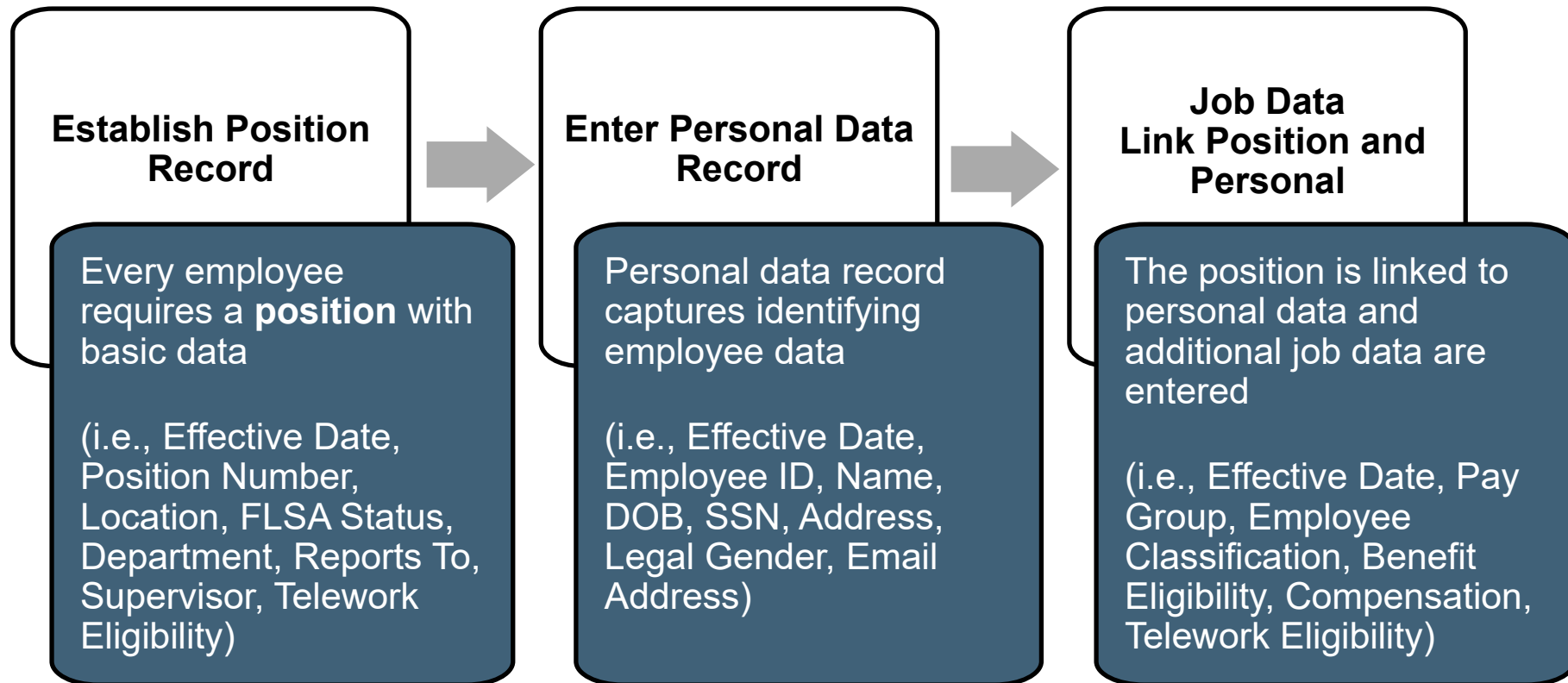
## Job Data

- Position
- Employee Classification
- Pay Group
- Compensation
- Benefit Eligibility
- Telework Eligibility / Agreement



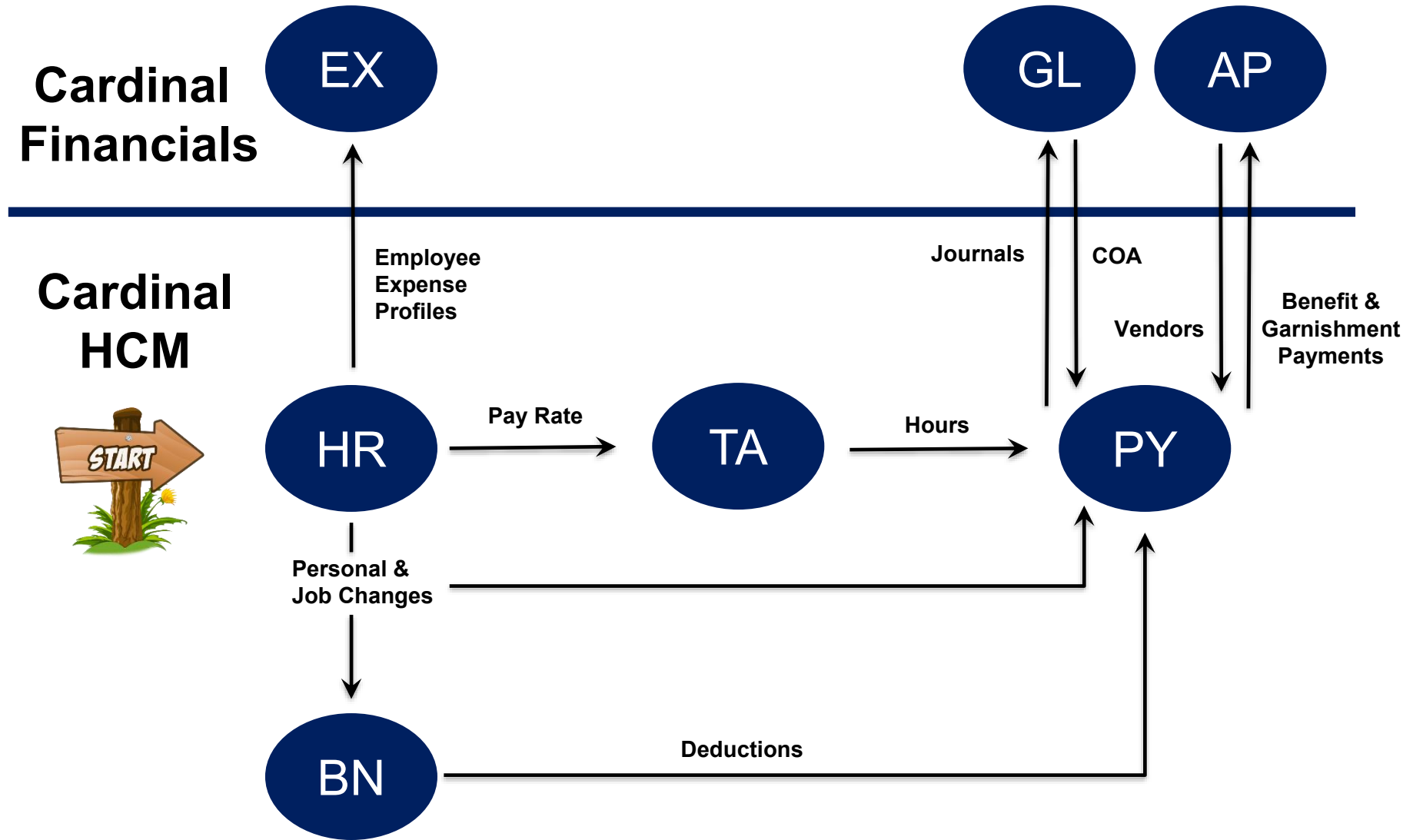
# Order of Entry for Human Resource Data

HR data must be entered into Cardinal in the following order: Position Data, Personal Data and Job Data.





# Cardinal HCM Interfacing to Cardinal Financials



**Financials:** Expenses (EX), General Ledger (GL), Accounts Payable (AP)

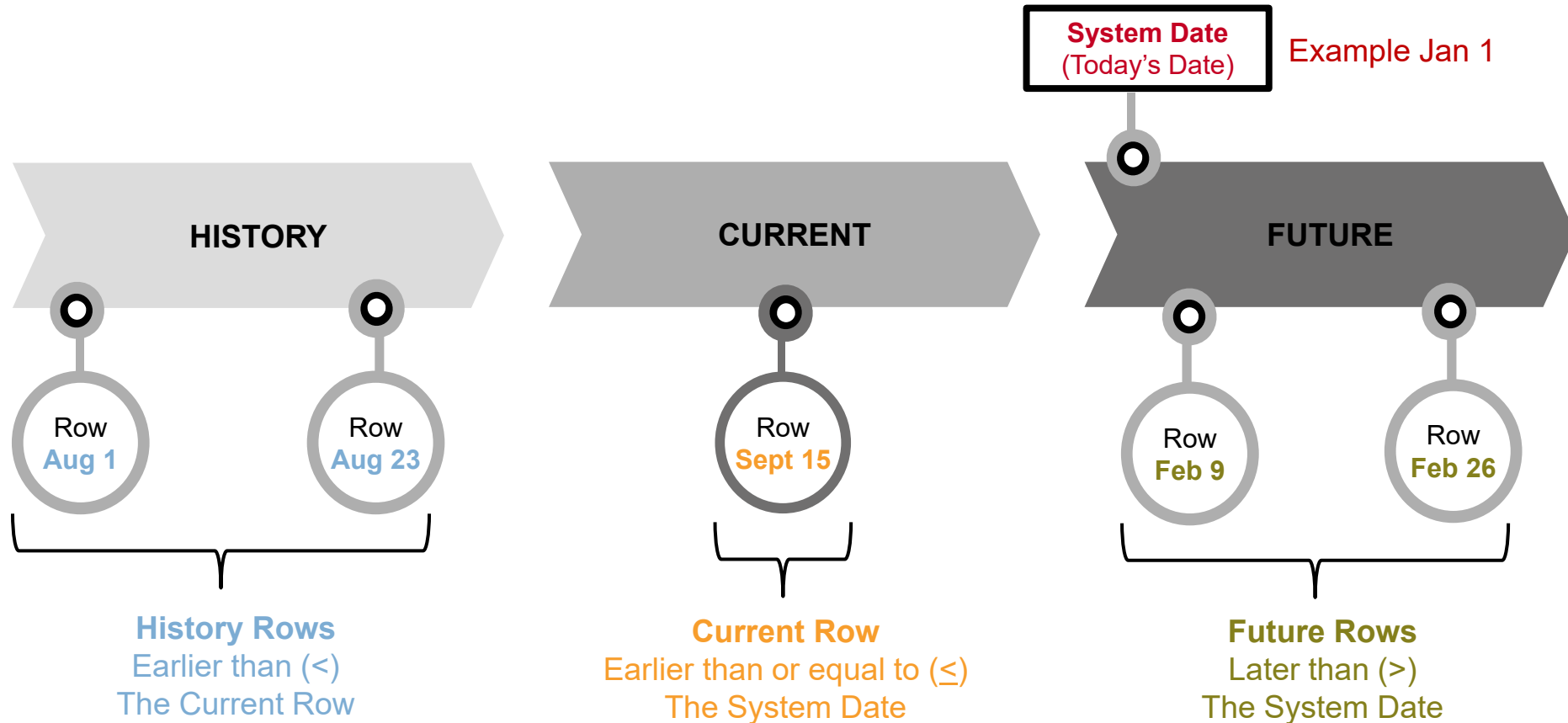
**HCM:** Human Resources (HR), Benefits Administration (BN), Time & Attendance (TA), Payroll (PY)



# Cardinal Effective Dating

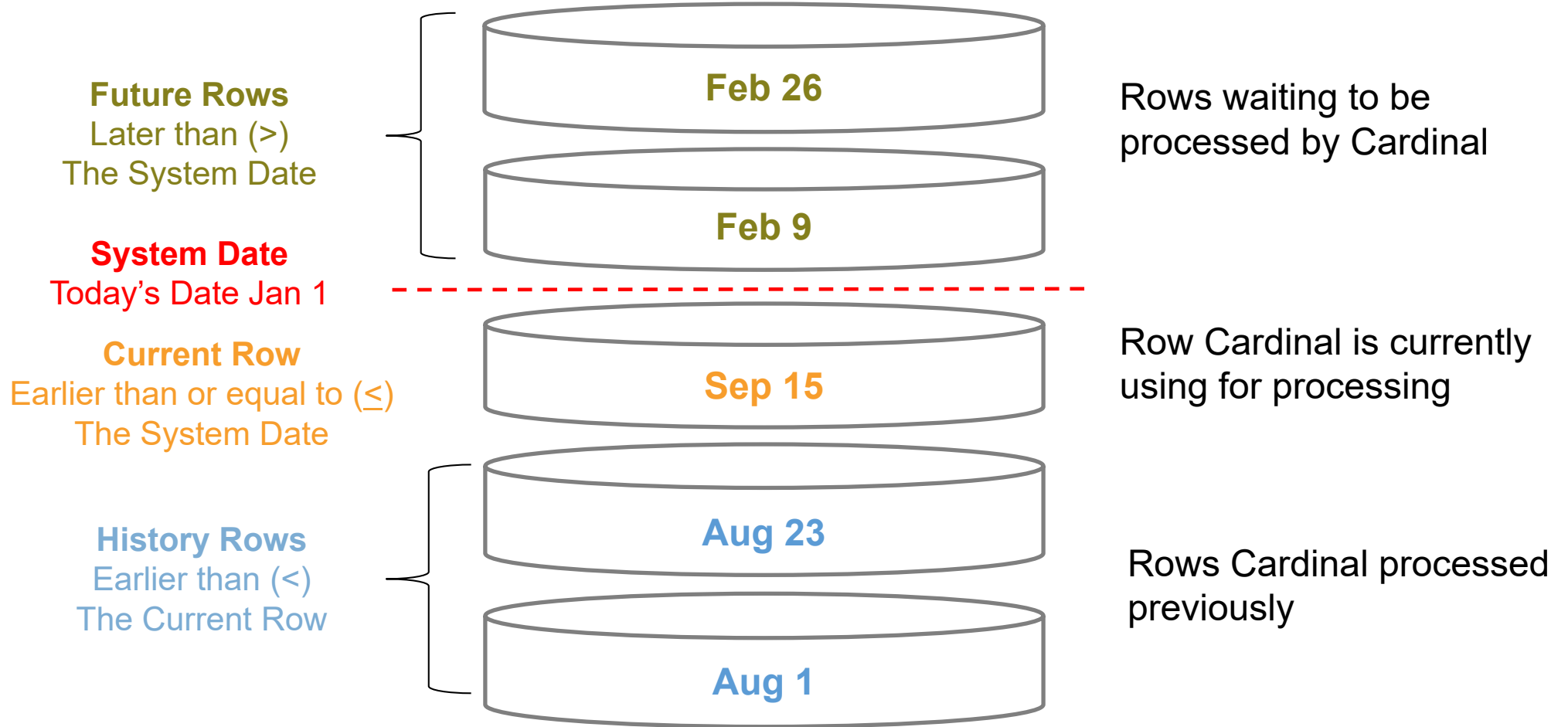
Effective dating provides the ability to keep historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal. To retain history, insert a data row identified by a date that indicates when the new information goes into effect: an effective date.

For further information on effective dating, see the job aid titled **HR351 Overview of Effective Dating**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.





# Cardinal Effective Dating – Layer Cake



**Note:** Send an email to [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov) with Cardinal in the Subject to submit a helpdesk ticket.



# Cardinal Effective Dating (continued)

## Group Effective Dating Activity

The employee has transactions in the system for the dates listed in gray below. Review each date and identify if it is a History, Current or Future dated row based on the system date.

**System Date: 07/10/2023**

03/12/2023

07/02/2023

10/01/2023

07/01/2023

**History**

**Current**

**Future**





# Lesson Summary

1

## Overview of Cardinal HCM

In this lesson, you learned:

- Cardinal is a web-based application that consists of Human Capital Management, Financials and Business Intelligence.
- Cardinal HCM is a highly integrated system.
- The importance of using effective dates.



# Lesson

2

## Human Resources (HR) Data Types

This lesson covers the following topics:

- HR Data Relationships
  - Position Data
  - Personal Data
  - Employee Job Record

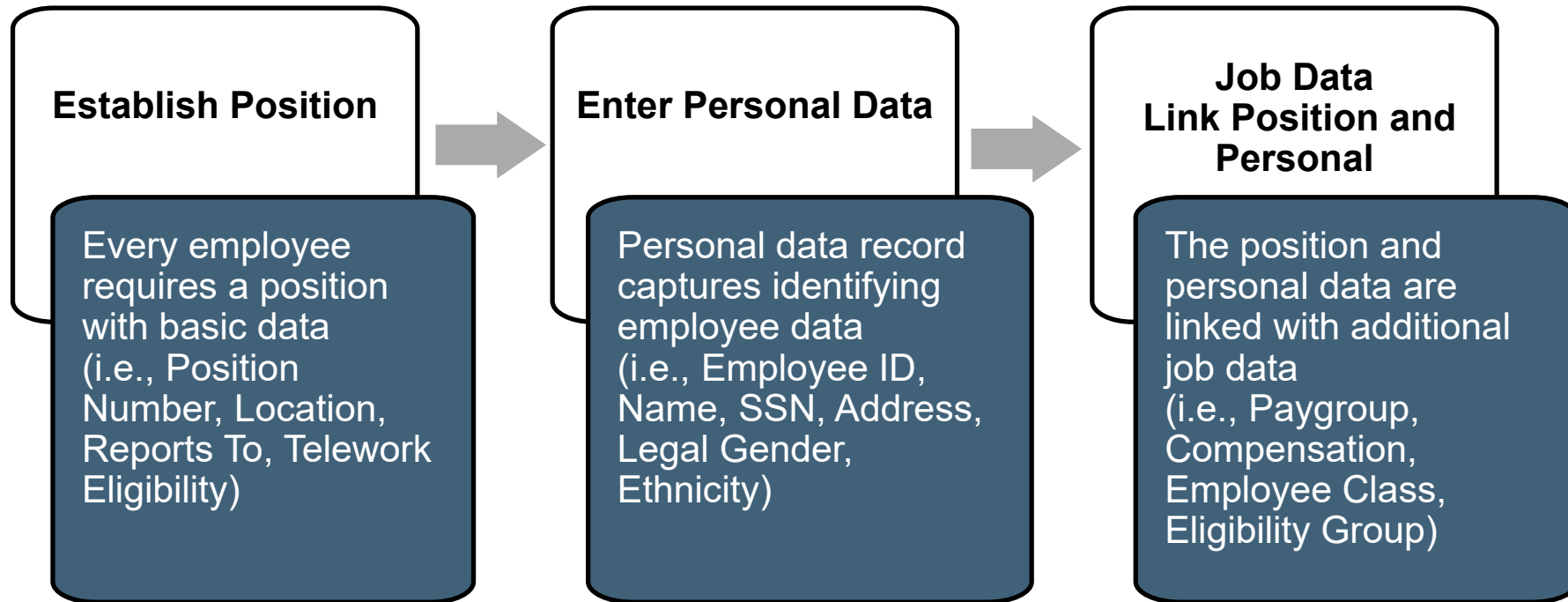


# HR Data Relationships



# Three HR Data Types

Human Resources is made of up of three data types in Cardinal: Position Data, Personal Data and Job Data.





# Data Relationship Video – Position Data

Position data is keyed first in HR when starting the hire process.

## Position

- Decisions are made regarding budget, location, supervisor, telework eligibility, etc. before entry into Cardinal
- Approval is obtained outside of Cardinal for the new position
- Cardinal does not create position numbers; they are provided by the agency
- The position is entered into Cardinal with an effective date and a unique position number
- Positions are associated with job codes when created
- The Reports To field on the position determines routing in the Time and Attendance module for timesheets and absence requests for agencies that use Cardinal Time and Attendance



# Data Relationship Video – Personal Data

Personal data is keyed second in HR during the hire process.

## Personal

- Search using the SSN to ensure the person does not already exist in Cardinal
- Determine the effective date to enter the person in Cardinal; this can be the hire date
- Ensure date of birth, SSN, legal gender, address and email address are available for entry
- If employee does not have an SSN, obtain a temporary one
- Capture Employee ID once created



# Data Relationship Video – Job Data

Job data is keyed third in HR during the hire process.



- Determine the effective date of the hire; can be different than personal data effective date
- Select the appropriate Action (Hire or Rehire) and Reason
- Select the position the employee is being hired into
- Complete required fields (i.e., Employee Class, Pay Group, Comp Frequency, Compensation Rate, etc.)
- Enter employee Telework Eligibility and Telework Agreement, if one is established



# HCM Key Concept

## 1 POSITION DATA\*

### **Position: DOA10001**

Effective Date: MM/DD/YY  
Pos Descr: Sr Account Analyst  
Business Unit: 15100  
Reports To: DOA10003

### **Position: DOA10002**

Effective Date: MM/DD/YY  
Pos Descr: Sr Account Analyst  
Business Unit: 15100  
Reports To: DOA10003

### **Position: ABC10012**

Effective Date: MM/DD/YY  
Pos Descr: Store Clerk  
Business Unit: 99900  
Reports To: ABC10123

## 3 JOB DATA\*

### **Empl ID:\*\* 00100123400**

Effective Date: MM/DD/YY  
Empl Rcd: 0  
Position: DOA10001  
Business Unit\*\*: 15100  
Benefit Program: SAL  
Reports To\*\*: DOA10003  
Pay Rate: 40,200.00/yr

### **Empl ID:\*\* 00100123600**

Effective Date: MM/DD/YY  
Empl Rcd: 0  
Position: DOA10002  
Business Unit\*\*: 15100  
Benefit Program: SAL  
Reports To\*\*: DOA10003  
Pay Rate: 38,200.00/yr

### **Empl ID:\*\* 00100123600**

Effective Date: MM/DD/YY  
Empl Rcd: 1  
Position: ABC10012  
Business Unit\*\*: 99900  
Benefit Program: WGE  
Reports To\*\*: ABC10123  
Pay Rate: 12.00/hr

## 2 PERSONAL DATA\*

### **Empl ID: 00100123400**

Effective Date: MM/DD/YY  
Name: Jane Doe  
DOB: 5/1/2000  
Address: 123 Main Street,  
Richmond, VA 23222  
SSN: 123-45-6789  
Legal Gender  
Email Address

### **Empl ID: 00100123600**

Effective Date: MM/DD/YY  
Name: Mark Thomas  
DOB: 5/1/2000  
Address: 123 Valley Dr,  
Richmond VA 23222  
SSN: 345-67-8999  
Legal Gender  
Email Address

\*Fields listed are only a sample for representative purposes \*\*Indicates a field on job data that is inherited from position and personal data





# Lesson Summary

2

## Human Resources Data Types

In this lesson, you learned:

- A position must exist in Cardinal before an employee can be hired
- All required personal data for the employee must be entered before completing the job data
- Employees can have a job in more than one agency



# Lesson

3

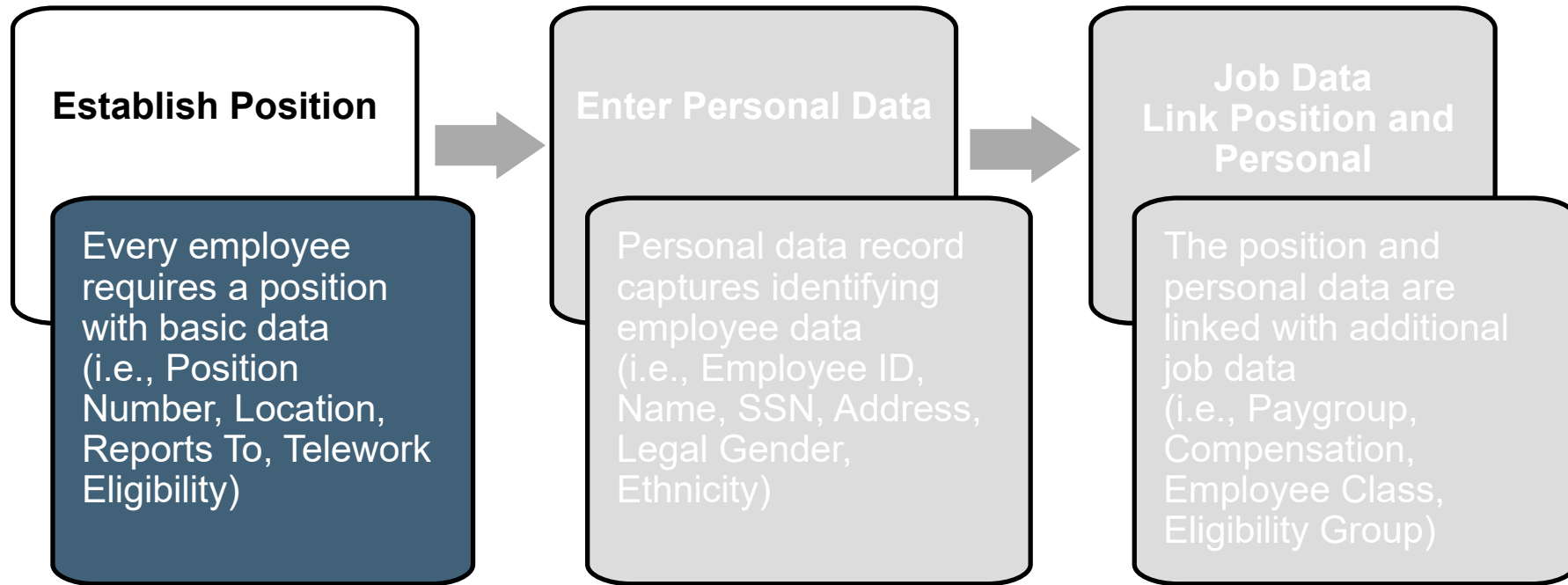
## Managing Positions Data

This lesson covers the following topics:

- Creating Positions
- Cloning Positions
- Updating Positions



# Creating and Maintaining Position Data





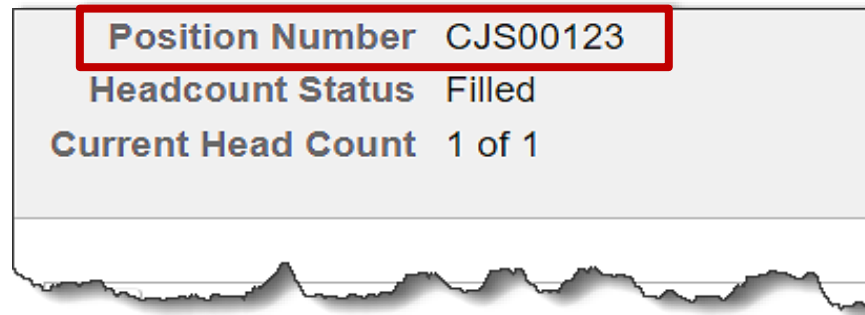
# Creating and Maintaining Position Data

Agencies who use Cardinal to maintain employee job information and/or participant state health benefits must create/maintain positions in Cardinal.

## Positions:

- Required and tracked when vacant or filled
- Each Agency must develop a process to track their Positions
- Created for all employees
- Created before employee is hired
- Unique for each agency and begins with a 3-character alpha prefix that represents the Agency
- Parent Agencies can enter positions for child Agencies

For further information on Creating, Cloning or Updating Positions, see the job aid titled **HR351 Managing Position Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



<b>Position Number</b>	CJS00123
<b>Headcount Status</b>	Filled
<b>Current Head Count</b>	1 of 1

Sample position number for Department of Criminal Justice Services (CJS)



# Creating New Positions

**Navigation:** Menu > Organizational Development > Position Management > Maintain Position Budgets > Manage Position

**▼ New Search**

Position Number

Description

Position Status  
Approved ▼

Reports To Position Number

Business Unit

Department

**Search** **Clear**

### View Manage/Create Position

100 results found.

Chart  No

100 rows

**+ Add**

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
CJS00000	Dir Dept of Crim Justice Servc	CJS00027	14000	CJS	10110	Active	00140	1/1
CJS00017	Accounts Receivable Accountant	CJS00027	14000	CJS	10230	Active	19031	1/1
CJS00023	Div Dir Ctr School&Campus Sfty	CJSUG002	14000	CJS	10710	Active	19216	1/1
CJS00027	Chief Financial Officer	CJS00000	14000	CJS	10230	Active	19035	1/1
CJS00029	Gen Admin Manager II	CJS00283	14000	CJS	10320	Active	19224	1/1
CJS00036	Grant Support Specialist	CJS00129	14000	CJS	10220	Active	19013	1/1
CJS00038	Grant Support Liaison	CJS00129	14000	CJS	10220	Active	19013	1/1



# Position Number and Effective Date

Cardinal does not create position numbers; you must provide the **Position Number** along with the **Effective Date**.

- Use your agency tracking file to determine the next available position number to provide to Cardinal.
- Enter the date this position should be effective.
- Click the **Continue** button.

**Create Position**

\*Position Number

\*Effective Date  

Effective Sequence 0

Reason NEW New Position



# Guided Entry of Position Data

Complete entry of required fields on each page and click the **Next** button. Below are key fields when creating a position:

- **Confidential Position** is used to prevent publishing of personal information of employees in the position
- **Available for Telework** must be set to Yes if the position is eligible for telework
- **Reports To** is the position where timesheets and absence requests are routed for approval
- **Supervisor** is the position responsible for day-to-day operational activities and performance reviews

Position Number CJS02000  
Headcount Status Open  
Current Head Count 0

**Next** >

**Step 1 of 4: Position Data**

Effective Date 08/01/2021  
Effective Sequence 0  
Reason Code NEW

Review Date  
\*Position Months 12.00  
Stmnt of Economic Interest Reqd  No  
VPA Covered  Yes

**Position Information**

\*Position Status   
\*Status   
Action Date 08/11/2021  
Alternate Work Schedule  Yes  
Key Position  No  
Budgeted Position  Yes  
 Confidential Position No

Max Head Count 1  
Status Date 05/29/2020  
SOC Code / Extension 13-2011  
Job Sharing Permitted  No  
Available for Telework  No  
\*EEO-4 Job Category No EEO-4 Reporting  
Workers' Comp Code 8810

**Job Information**

For information on SOC Codes and Job Codes, see the job aid titled, **HR351\_Overview of US SOC and Job Code Combinations**. This job aid is located on the **Cardinal Website** under **Learning**.



# Reports To and Supervisor Fields

**Reports To and Supervisor fields:** Can be the same person or can be different.

Work Location		
Reg Region	USA	United States
Company		DLI
Department	18100	DEPT OF LABOR AND INDUSTRY
Dot-Line		
Location	MANA	MANASSAS REGIONAL OFFICE
Security Clearance		
Reports To	DLI00545	Consultation Program Manager
Supervisor Position		DLI00545
<a href="#">View Current Incumbents</a>		
Appointed Category		N/A
Supervisor Lvl	E	Employee

If the **Reports To** position is temporarily vacant or if the person is on a leave of absence:

- There is no need to enter a different person in the **Reports To** field because the timesheet and absence approvals will route to the next higher-level **Reports To** position.

Work Location		
Reg Region	USA	United States
Company		DLI
Department	18100	DEPT OF LABOR AND INDUSTRY
Dot-Line		
Location	MANA	MANASSAS REGIONAL OFFICE
Security Clearance		
Reports To		
Supervisor Position		
<a href="#">View Current Incumbents</a>		
Appointed Category		N/A
Supervisor Lvl	E	Employee





# Current Incumbents Section

Once someone is hired into a position, their information shows up in **Current Incumbents** within the **Budget and Incumbents** section.

- **Name** field displays the employee's name
- **Empl ID** field displays the employee ID
- **Effective Date** field shows the effective date of the highest row in job data for the employee
- **Action** and **Action Reason** shows the description of the action and reason on the highest job data row

Position Number CJS00078  
 Headcount Status Partially Filled  
 Current Head Count 1 of 500

▶ **Education and Government**

▼ **Budget and Incumbents**

Earnings 0.000 Cdn Tax 0.000  
 Deductions 0.000 Total 0.00  
 Tax 0.000  
 Update Incumbents Yes  
 Include Salary Plan/Grade Yes  
 Force Update for Title Changes Yes

Current Incumbents										1 row
Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data	
Brown Orange	00858079900	1	Full-Time	40.00	01/03/2023	Return from Leave	Return From Leave	N	Job Data	

[CI Exceptions](#)

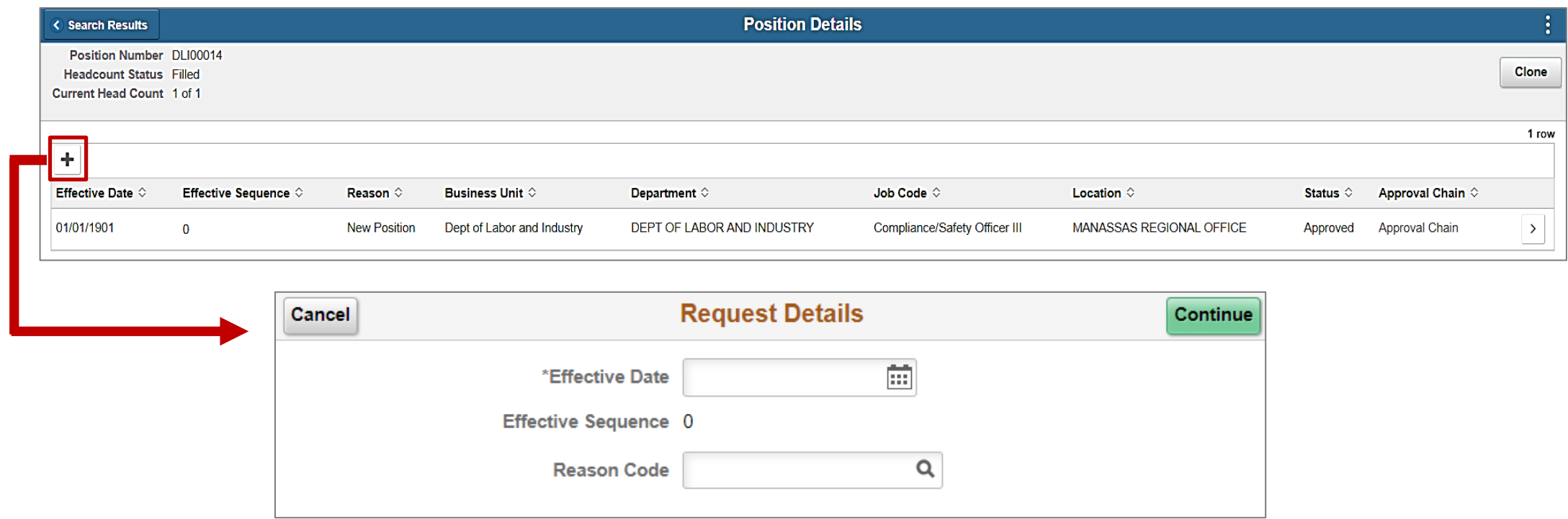
▶ **Summary of Changes**



# Updates to Positions with Incumbents

Changes made to a position are carried over to the incumbent employee's job data. Prior to making a change to the position, check the incumbent employee's job data to verify that the current effective dated row is prior to the proposed effective date of the position change. If it is not, the position change will not flow to the incumbent's employee job data without entering a help desk ticket to VCCC - [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov)

**Example:** If the effective date for the position change is 3/1/2023 then the top row of the incumbent employee's job data must be dated prior to 3/1/2023 in order for the position change to flow to the incumbent's employee job data without requiring a help desk ticket.



**Position Details**

Position Number DLI00014  
Headcount Status Filled  
Current Head Count 1 of 1

Clone

1 row

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	New Position	Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Compliance/Safety Officer III	MANASSAS REGIONAL OFFICE	Approved	Approval Chain

**Request Details**

Cancel Continue

\*Effective Date

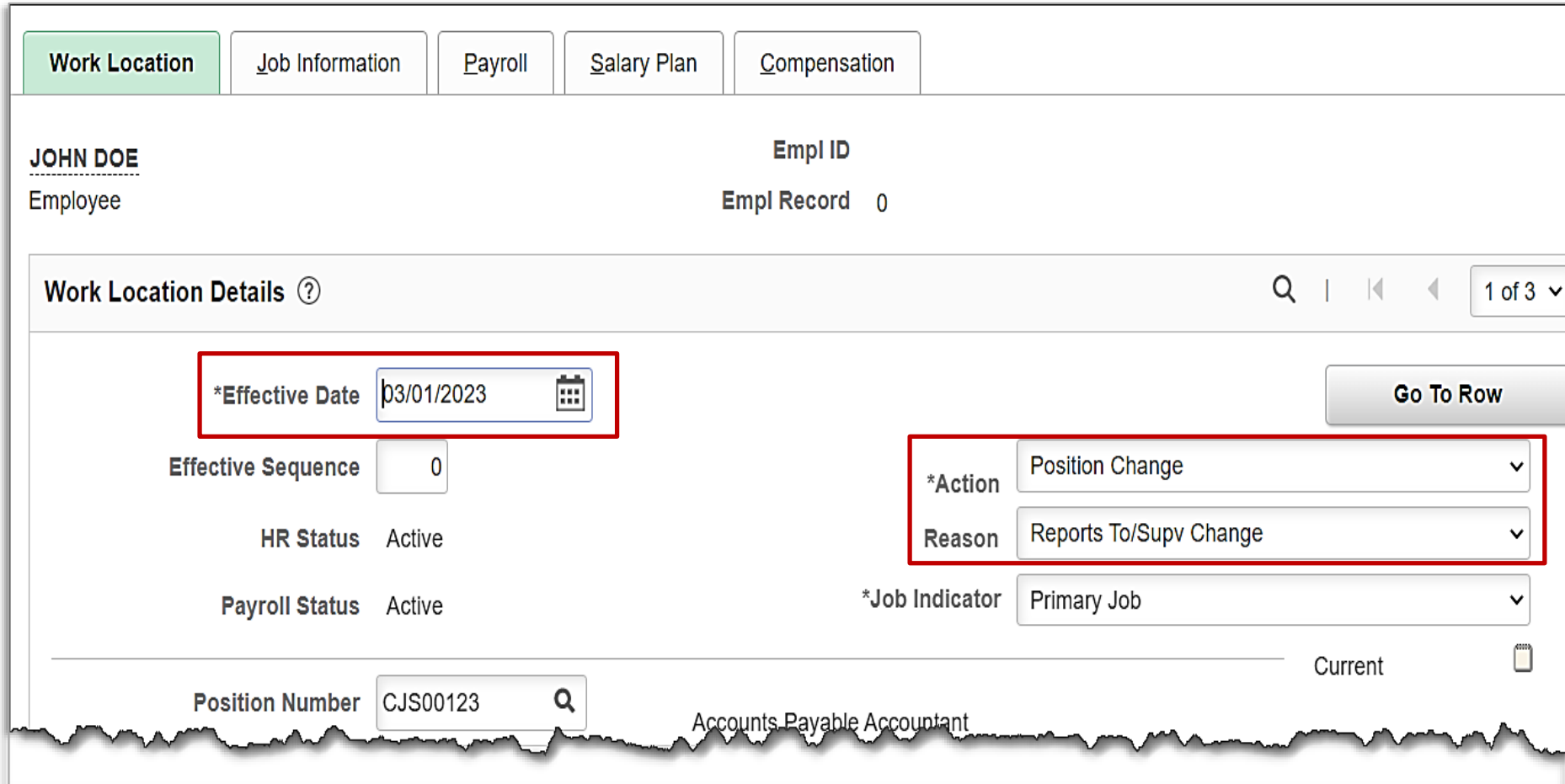
Effective Sequence 0

Reason Code



# Position Change Reflected in Job Data

The change made to the position flows to job data for the employee in the position. It is placed at the top of the stack of the employee's job data.



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

**JOHN DOE**      Empl ID  
Employee      Empl Record 0

Work Location Details ?      1 of 3

\*Effective Date 03/01/2023      Go To Row

Effective Sequence 0      \*Action Position Change

HR Status Active      Reason Reports To/Supv Change

Payroll Status Active      \*Job Indicator Primary Job

Position Number CJS00123      Current

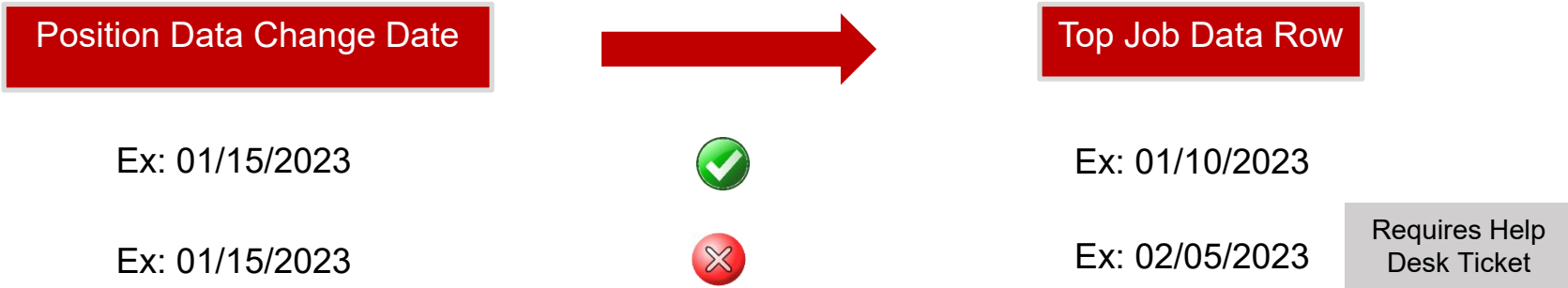
Accounts Payable Accountant

For further information on updated a position with an incumbent, see the job aid titled **HR351\_Managing Position Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Effective Dating for Position Changes

Position Data changes automatically carry over to Job Data of the current incumbent as long as the Position change Effective Date is greater than (after) the current Job Data row.



**Note:** Position changes that occur before the current effective dated row on Job Data, require a Help Desk ticket.

Position Change Effective Date

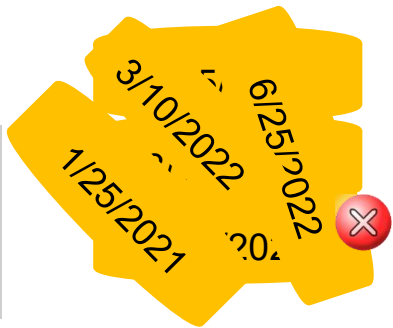
Job Data Rows Effective Dates

Position Change Effective Date

Job Data Rows Effective Dates

6/10/2022

Requires Help Desk Ticket



7/10/2022





# Effective Sequence in Position and Job Data

The **Effective Sequence** field is located directly below the **Effective Date** field on the Position and Job Data pages. This field defaults to 0 whenever a transaction is entered but increases (either systematically or manually) whenever the same effective date is used consecutively.

The screenshot shows a web form titled "Create Position". At the top left is a "Cancel" button and at the top right is a "Continue" button. The form contains three input fields: "\*Position Number" (empty), "\*Effective Date" (with a calendar icon), and "Effective Sequence" (containing the value "0"). A red rectangular box highlights the "\*Effective Date" and "Effective Sequence" fields. Below the form, the text "Reason NEW New Position" is displayed.

Position Data page – Effective Sequence updates systematically

The screenshot shows a web page with a navigation bar at the top containing buttons for "Work Location", "Job Information", "Payroll", "Salary Plan", and "Compensati". Below the navigation bar, the text "Employee" is on the left and "Empl ID" and "Empl Record" are on the right. A section titled "Work Location Details" with a help icon (?) contains two input fields: "\*Effective Date" (with a calendar icon) and "Effective Sequence" (containing the value "0"). A red rectangular box highlights these two fields.

Job Data page – Effective Sequence is updated manually




# Using the Same Effective Date with Position and Job

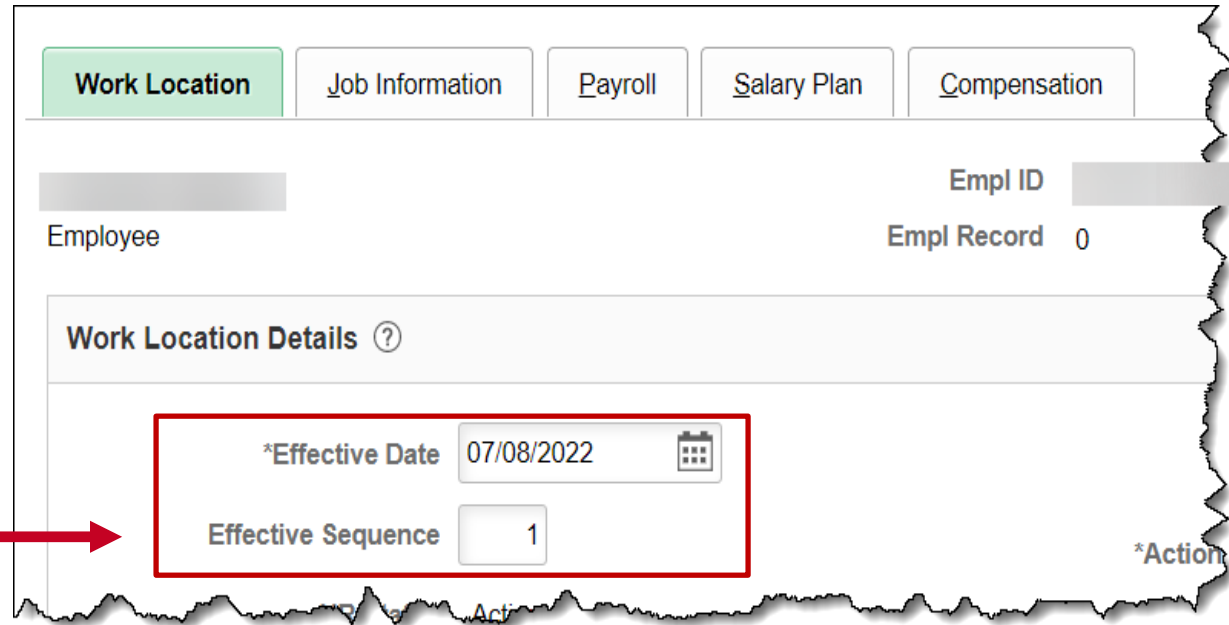
When a Position change and Job change have the same Effective Date, follow the steps below to ensure the changes are made in the appropriate order so that a help desk ticket is not required.

## Position Data Change

1. Always enter the position change first. Make sure the position change effective date is after the top of stack effective date in job data.
2. The position change will carry over to Job Data upon save and create a new row in Job Data.

## Job Data Change

3. Navigate to the Job Data page.
4. Enter a new row with the same Effective Date as the position change.
5. Manually increment the Effective Sequence by 1. 
6. Enter the applicable job data changes.



The screenshot shows a software interface with a navigation bar at the top containing tabs for 'Work Location', 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'. Below the navigation bar, there is a section for 'Employee' with fields for 'Empl ID' and 'Empl Record' (0). The main content area is titled 'Work Location Details' and contains a form with two fields: '\*Effective Date' with the value '07/08/2022' and a calendar icon, and 'Effective Sequence' with the value '1'. A red box highlights these two fields. A red arrow points from the text 'Manually increment the Effective Sequence by 1.' to the 'Effective Sequence' field. The bottom right corner of the form has a '\*Action' label.



# Cloning a Position

If you have several positions to create that are identical or similar, the clone functionality can save you some keystrokes.

- Locate the position to copy from and navigate to the **Position Details** page.
- Click the **Clone** button (upper right corner).
- Enter the position number for new position in the **Position Number** field.
- Enter the date the new position should be effective in the **Effective Date** field.
- Click the **Continue** button.

**Position Details**

Position Number DLI00014  
Headcount Status Filled  
Current Head Count 1 of 1

1 row

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	New Position	Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Compliance/Safety Officer III	MANASSAS REGIONAL OFFICE	Approved	Approval Chain

**Clone**

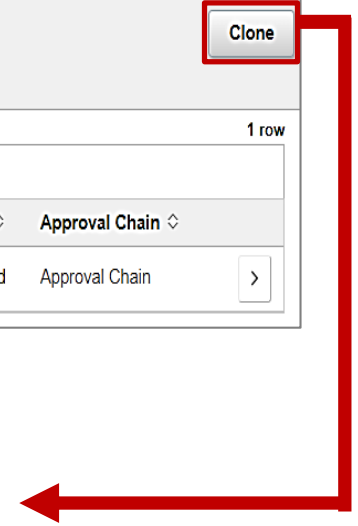
Cancel Continue

\*Position Number

\*Effective Date

Effective Sequence 0

Reason NEW New Position





# Using the Employee Position Report (EPR) Tool

The Employee Position Reports (EPR) Tool is used to report staffing levels by type of funding across a broad diversity of executive, legislative, judicial, independent Agencies, colleges, and universities. The report is generated and submitted once a month.

**Navigation:** Menu > Workforce Administration > EPR Tool (special security role required)

Non-Faculty		Faculty	Totals
Business Unit 18100 Dept of Labor and Industry			
<b>Employee Position Reports</b>			
Non-Faculty		1-3 of 11	
*Effective Date	General Fund	Restricted Headcount	Restricted FTE
08/31/2022		2	1.50
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	5	2.50
		141	106.50
		2	7.00
<hr/>			
*Effective Date	General Fund	Restricted Headcount	Restricted FTE
07/31/2022		2	1.50
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	5	3.50
		141	106.00
		2	9.00
<hr/>			
*Effective Date	General Fund	Restricted Headcount	Restricted FTE
06/30/2022		2	1.50
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	5	3.50
		140	108.50
		3	10.00
		2	6.00

Save Return to Search Notify

For further information on using the EPR Tool, see the job aid titled **HR351 EPR Tool Overview**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.





# Lesson Summary

3

## Managing Position Data

In this lesson, you learned:

- How to create new positions
- How to properly make updates to positions
- How to create clone positions



# Lesson

4

## Managing Employee Personal Data

This lesson covers the following topics:

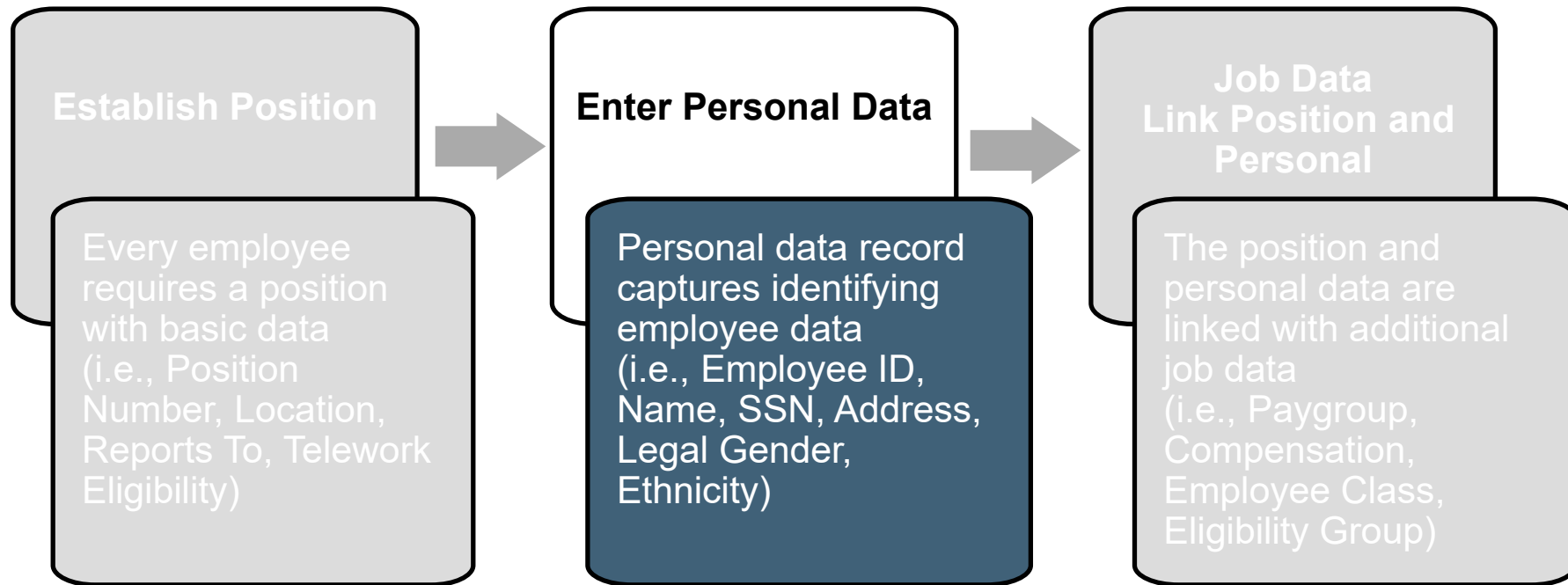
- Performing Search Match
- Entering new hire personal data
- Updating personal data
- Finding only personal data in Cardinal



# Personal Data Information

Of the three HR Data types (Position, Personal and Job), Personal Data is entered second into Cardinal.

Once we have an accepted job offer and all the required paperwork, the employee can be entered into Cardinal.





# Personal Data Information

Prior to starting the New Hire/Rehire process, make sure that all the new hire paperwork is in place. A social security number is required to save a personal data record in Cardinal.

## Temporary Social Security Number (SSN)

On occasions, an employee's SSN may not be available at the time of hire because the employee is awaiting an SSN. In these cases, it is necessary for the Agency HR Administrator to obtain a temporary SSN in order to save the personal data information and fully process the hire in Cardinal. The Agency HR Administrator also should verify that the employee has submitted the required SS-5 Application for a Social Security card with the Social Security Administration.

The assigning of the Temporary SSN is different for employees who are eligible for VRS Retirement employees and Non VRS Retirement Program employees.

For further information on how to assign a temporary SSN to an employee, see the job aid titled **HR351 Assigning and Monitoring Temporary SSNs**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Steps to Obtain a Temporary Social Security Number

The highlighted rows in each process identifies the steps where the processes are different.

VRS Temp SSN Process	
<b>Agency</b>	Request temporary SSN from VRS.
<b>VRS</b>	Provide Agency with Temp SSN
<b>Agency</b>	Complete new hire in Cardinal
<b>Employee</b>	Provide HR Admin copy of new SSN Card
<b>Agency</b>	Using a secure method notify iHelp of new SSN
<b>iHelp</b>	Update employee Personal record with permanent SSN
<b>iHelp</b>	Notify OHB of the newly received permanent SSN
<b>iHelp</b>	Notify the applicable Payroll office of new SSN

NON VRS Temp SSN Process	
<b>Agency</b>	Run the emp SSN query to determine next Temp SSN number
<b>Agency</b>	Complete new hire in Cardinal
<b>Employee</b>	Provide HR Admin copy of new SSN Card
<b>Agency</b>	Using a secure method notify iHelp of new SSN
<b>iHelp</b>	Update employee Personal record with permanent SSN
<b>iHelp</b>	Notify OHB of the newly received permanent SSN
<b>iHelp</b>	Notify the applicable Payroll office of new SSN



# Personal Data Information

## Search Match

Prior to entering a new hire or rehire, the Agency HR Administrator performs a Search Match using the employee's SSN to determine if the person already exists in Cardinal or to capture their employee ID.

- If a match is not found, proceed with adding the person's personal information into Cardinal to generate an Employee ID.
- If a match is found, the Agency HR Administrator must go to the **Person Organizational Summary** page to determine how to process the hire. (i.e., rehire if a terminated employee record is found or transfer if an active employee record is found)

**Add a Person**

Person ID

For agencies with their own HR systems that elect to interface with Cardinal HCM, an upload interface allows agencies to send employee new hire records without an employee ID number. Cardinal then assigns the employee ID as part of the upload step. The process to complete a new hire upload interface is covered in the job aid titled **HR351 Interface Administration**.



# Search Match uses Social Security Number

- Enter the employee's SSN in the **Value** field
- Press the **Tab** key on the keyboard
- Click the **Search** button above

### Search Criteria

Search Type Person  Ad Hoc Search

Search Parameter PSRS\_HIRE Search by SSN

**Search Result Rule** [?](#)

Search Result Code PSRS\_HIRE  Clear All Carry ID reset

User Default Search by SSN

### Search Criteria

[?](#)

Search Fields

National Id

Value

### Search by Order Number

[?](#)

Search Order	Description
10	NID Only

Select



# Search Match Search Results

If a match on the SSN is found, the **Search Results** section displays the **Empl ID**, **Last Name** and **First Name** with a link to the **Person Organizational Summary** page.

- Verify the SSN was entered correctly
- Verify the name matches the person being hired

New Window | Help

## Search Results

Search Type Person  Ad Hoc Search

Search Parameter PSRS\_HIRE Prepare For Hire

Result Code PSRS\_HIRE Prepare For Hire

▼ Search Results Summary

Number of ID's Found	1	
Search Order Number	10	NID Only

[Return to Search Criteria](#)

▼ Search Results

		Empl ID	Last Name	First Name	Middle Name			
1	<a href="#">Carry ID</a>					<a href="#">Person Organizational Summary</a>	<a href="#">+</a>	<a href="#">-</a>





# Person Organizational Summary with Employee Records

The **Assignments** section displays all employee records of the employee assigned to this employee ID (**Person ID** field).

Review key fields in this section:

- **Empl Record:** This correlates with the number of jobs at different agencies. It starts at 0 and increments when the employee transfers to a new agency or changes employee type (i.e., wage to salary or salary to wage) within the same agency.
- **HR Status:** Displays as **Active** if the employee is currently employed at the Commonwealth or **Inactive** if no longer employed.
- **Payroll Status:** Displays the person's current payroll status. There are several different payroll statuses.
- **Date Last Change (Effective Date):** The Effective Date used to process the last transaction.
- **Business Unit:** The agency where the employee last worked.
- **Term Date:** The last day worked; day before the effective date.

**Person Organizational Summary**

Person ID [REDACTED]

---

▼ **Employment Instances** Q | << < 1 of 1 > >> | View All

ORG Instance 0                      Last Hire 06/10/2020                      Termination Date 06/10/2020  
 HR Status Inactive                      Payroll Status Terminated

**Assignments**

<< < 1-1 of 1 > >>

Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Job Code	Grade	Benefits Status
0	Inactive	Terminated	06/11/2020	71800	06/10/2020	Classified Salary	06/10/2020	91512	6	Active

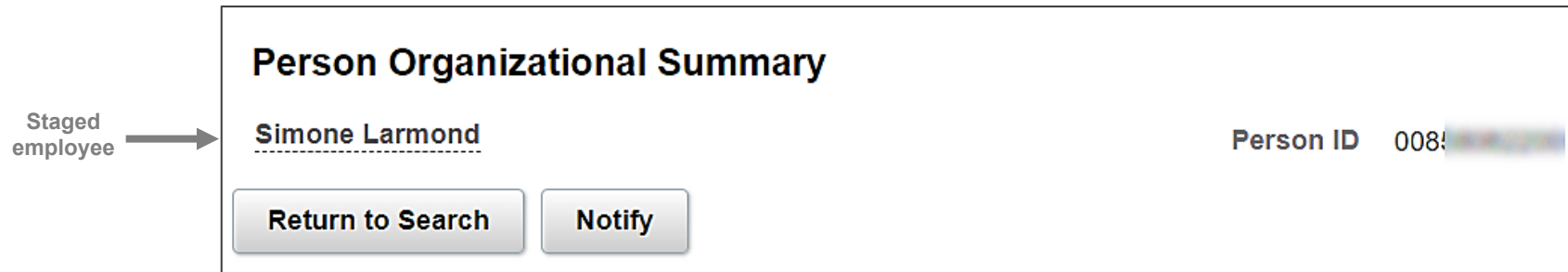
Return to Search    Notify



# Person Organizational Summary with Personal Data Only

There are times when only an employee's name and employee ID displays on the **Person Organizational Summary** page. This could be for a couple of different reasons.

- The employee previously worked for the Commonwealth and their termination date was prior to 2021.
  - The job data for those employees did not get converted into Cardinal; only their personal data.
- Only the employee's personal data and not job data was entered into Cardinal.



Additional research, using the employee's ID and the legacy HR system, is required to determine which category it falls into.

When hiring or rehiring an employee that shows up like this, the **Add Employment Instance** option is used to create a new employee record to process the hire.

- The **Add a Person** step is not needed because Search Match found a match on their SSN which indicates their personal information already exists in Cardinal.

For further information on adding a new employment instance for a new hire or rehire, see the job aids titled **HR351\_Creating a New Hire** and **HR351\_Creating a Rehire**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.



# Add a Person

After completing the employee search match, if a match was not found navigate back to the **Add a Person** page and click the **Add Person** button.

**Navigation:** Menu > Workforce Administration > Personal Information > Add a Person

**Add a Person**

Person ID

**Add Person**

[Search for Matching Persons](#)



# Biographical Details Tab

This tab contains the following information:

- Name
- Date of Birth
- (Legal) Gender
- Highest Education Level
- Marital Status
- National ID (SSN)

Effective Dated items:

- Name
- Gender
- Highest Education Level
- Marital Status

Biographical Details

[Contact Information](#)

[Regional](#)

[Organizational Relationships](#)

[VA Person Info](#)

Person ID NEW

Name
1 of 1
View All

\*Effective Date

\*Format Type

Display Name

**Biographic Information**

Date of Birth
Years 0 Months 0

Birth Country
USA
United States

Birth State

Birth Location
 Exclude Contact Information?

Biographical History
1 of 1
View All

\*Effective Date

\*Gender

\*Highest Education Level

\*Marital Status

Language Code

Alternate ID

As of

Full-Time Student

**National ID**

USA
1-1 of 1
View All

*Country	*National ID Type	National ID	Primary ID		
USA	Social Security Number	<input style="width: 100%;" type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>




# Biographical Details Tab - Name

The **Name** section is where you enter the employee's name.

- **Effective Date:** enter the date this person becomes effective in Cardinal.

**Name** 🔍 | ⏪ ⏩ 1 of 1 ▾ ⏪ ⏩ | View All

<b>*Effective Date</b>	<input type="text" value="06/22/2023"/> 	<input type="button" value="+"/> <input type="button" value="-"/>
<b>*Format Type</b>	<input type="text" value="English"/> ▾	
<b>Display Name</b>	<input type="button" value="Add Name"/>	



# Biographical Details Tab - Name (continued)

- **Name Prefix:** Use drop down option to select
- **\*First Name:** Required field
- **Middle Name:** Do not enter a period if only using initial
- **\*Last Name:** Required field
- **Name Suffix:** Use drop down option to select

Name ×

[Help](#)

**English Name Format**

Name Prefix	<input type="text"/>
*First Name	<input type="text"/>
Middle Name	<input type="text"/>
*Last Name	<input type="text"/>
Name Suffix	<input type="text"/>
Display Name	
Formal Name	
Name	

**Note:** If an employee submits a Name Change request via ESS, once it's approved it will show up in this section.



# Biographical Details Tab – Biographical History

- **Date of Birth:** Required field
- **Exclude Contact Information?:** This option should only be selected when someone's personal information should not be published in employee data extracts (i.e., Court order of protection)
- **Effective Date:** Defaults from Name field
- **(Legal) Gender:** Defaults to Unknown but must be updated to the employee's legal gender. Payroll will error out for this employee if this is not updated.
- **Highest Education Level:** Defaults to Not Indicated but should be updated
- **Marital Status:** Defaults to Unknown but should be updated

### Biographic Information

Date of Birth	<input type="text"/>	Years	0	Months	0
Birth Country	USA	United States			
Birth State	<input type="text"/>				
Birth Location	<input type="text"/>	<input type="checkbox"/> Exclude Contact Information?			

### Biographical History

1 of 1 | View All

*Effective Date	06/22/2023	+ -
*Gender	Unknown	
*Highest Education Level	Not Indicated	
*Marital Status	Unknown	As of <input type="text"/>
Language Code	<input type="text"/>	
Alternate ID	<input type="text"/>	
<input type="checkbox"/> Full-Time Student		



# Biographical Details Tab – National ID

- **National ID** field is required for all employees.
- Employees without a Social Security Number (SSN) are assigned a temporary number until a permanent SSN is received.
- Department of Human Resources Management (DHRM) must update the SSN in Cardinal when the permanent SSN is received.

▼ **National ID**

⌵ 🔍 1-1 of 1 View All

*Country	*National ID Type	National ID	Primary ID			
USA 🔍	Social Security Number ▼	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>	

Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

- Do NOT click the **Save** button until very end.
- Navigate to the next tab using the links at the bottom or tabs at the top of the page.





# Contact Information Tab

This tab contains the following information:

- **Current Addresses:** current and historical
- **Phone Information**
- **Email Option Selection**
- **Email Addresses**

Biographical Details
Contact Information
Regional
Organizational Relationships
VA Person Info

Empl ID NEW

**Current Addresses**

🔍
1-1 of 1
View All

Address Type	As Of Date	Status	Address		
Home	06/21/2023	A		<a href="#">Add Address Detail</a>	+ -

**Phone Information**

🔍
1-1 of 1
View All

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

**Email Option Selection**

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, **except:**  
 2. When no email address is available, select applicable email option and **ALWAYS** use noemail@virginia.gov

**Email Addresses**

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



# Contact Information Tab – Current Addresses

This section displays the employee's current address as of the date in the **As of Date** field. The address types available to maintain are:

- Home
- Mailing

Current Addresses							
☰		🔍		◀◀ 1-2 of 2 ▶▶		View All	
Address Type	As Of Date	Status	Address				
Home	06/22/2023	A		Add Address Detail	+	-	
<input type="text" value=""/>				Add Address Detail	+	-	

Mailing

Employee's addresses can be updated either by the:

- HR Administrator
- Employee via Employee Self Service



# Contact Information Tab – Edit Address

The following address fields are required:

- **Address 1**
- **City**
- **State**
- **Postal Code** (full 9-digit zip code not required)

**Note:** The state and/or postal code selected as part of the address has a direct impact on benefit options.

### Edit Address

Country United States

Address 1

Address 2

Address 3

City  State

Postal

County



# Contact Information Tab – Edit/View Address Detail

This section displays the employee's current address for the specified **Address Type** as of the date in the **As of Date** field.

- If ever a paper check had to be mailed to the employee, this likely is the address it would go to. (Unless the employee had a mailing address specified here.)

Current Addresses						
☰		🔍		⏪ ⏩ 1-2 of 2 ▾		▶▶   View All
Address Type	As Of Date	Status	Address			
Home	06/22/2023	A	100 Main Street Richmond, VA 23219	<a href="#">Edit/View Address Detail</a>	<input data-bbox="1947 706 2015 778" type="button" value="+"/>	<input data-bbox="2061 706 2130 778" type="button" value="-"/>

**Note:** If a future dated address is entered, it will not show up on this page until the effective date. Then the current address would show in Address History section which is accessed by clicking the **Edit/View Address Detail** link.



# Contact Information Tab – Phone and Email

Phone Information section is required.

- Phone numbers entered do not have to be unique; some use a department phone number for employees here

An email address is required to:

- Save an employee’s personal data record in Cardinal
- Register for access to Cardinal as a core user (i.e., HR Admin, TA Admin, BN Admin, and PY Admin)
- Register for access to Employee Self Service functionality for non-core users

**Phone Information**

☰ 🔍 1-1 of 1 ▾ ▶▶ | [View All](#)

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

**Email Option Selection**

Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except:  
 2. When no email address is available, select applicable email option and **ALWAYS** use noemail@virginia.gov

**Email Addresses**

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



# Contact Information Tab – Phone and Email (continued)

**Email Option Selection** is required.

- **Agency Provided Email:** select this option if you have the employee’s agency provided email address
- **Pending Agency Provided Email:** select this option if do not yet have the agency provided email address
- **Employee Provided Email:** select this option for employee provided email addresses (i.e., terminated employees)

**Email Addresses** is required.

- **Email Type:** options are either Business or Personal
- **Email Address:** the placeholder email address of [noemail@virginia.gov](mailto:noemail@virginia.gov) must be used with the Pending Agency Provided Email option.
- **Preferred:** only one email address can be selected as preferred. The preferred email is used by vendors (i.e., Aetna, Kaiser, etc.).

**Email Option Selection**

Agency Provided Email     
  Pending Agency Provided Email     
  Employee Provided Email

1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, **except:**  
 2. When no email address is available, select applicable email option and **ALWAYS** use noemail@virginia.gov

**Email Addresses**

*Email Type	*Email Address	Preferred		
Business <span style="float: right;">▼</span>	<input style="width: 90%;" type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>



# Regional Tab – Ethnic Group and Veteran

This page displays the employee's ethnicity information and military status which is entered by either the:

- HR Administrator
- Employee via Employee Self Service

Biographical Details | Contact Information | **Regional** | Organizational Relationships | VA Person Info

Person ID NEW

USA

**Ethnic Group** 1 of 1 View All

Regulatory Region   United States

Ethnic Group

Primary

**History** 1 of 1 View All

Effective Date

Date Entitled to Medicare

Citizenship (Proof 1)

Citizenship (Proof 2)

Eligible to Work in U.S.

**Veteran**

Military Status

Military Discharge Date  Edit Discharge Date



# Organizational Relationships Tab – Employee ID Assigned

To add an Employee Relationship or simply save the personal data record:

1. Select the **Employee** checkbox
2. Hire defaults in the **Select Checklist Code** field
3. Here is where you can make a choice to either:
  - a) Click the **Add Relationship** button and automatically go to Job Data to complete the hire now
  - b) Click the **Save** button to save personal data only (Hire to be completed later)

New Window | Help | Personalize Page

Biographical Details | Contact Information | Regional | **Organizational Relationships** | VA Person Info

Person ID

**Choose Org Relationship to Add**

**Employee**

Contingent Worker

Person of Interest

Select Checklist Code [dropdown] »

Add Relationship

**3a**

**3b**

Save | Notify | Refresh | Add | Update/Display | Include History

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info





# Other Personal Information

- VA Person Info tab
- Citizenship
- Emergency Contacts
- Disability
- Employee Self Service Approvals





# VA Person Info tab

Information on this tab can be completed after hiring the employee.

- **Power of Attorney:** indicates the person who has the right to make benefit related decisions for the employee and who provides the death certificate upon death notification
- **Linked Participant EmplID:** is the employee ID of another employee linked to this employee's benefits
- **Preferred Pronoun:** this information is supplied by the employee either via ESS or HR Administrator
- **Preferred Gender:** this information is supplied by the employee either via ESS or HR Administrator

<a href="#">Biographical Details</a>	<a href="#">Contact Information</a>	<a href="#">Regional</a>	<b>VA Person Info</b>			
[Redacted]		Person ID	[Redacted]			
Power Of Attorney	<input type="text"/>	Linked Participant EmplID	<input type="text"/>			
Preferred Pronoun	He/Him <input type="button" value="v"/>	Preferred Gender	Non-Binary <input type="button" value="v"/>			
<input type="button" value="Save"/>	<input type="button" value="Return to Search"/>	<input type="button" value="Previous in List"/>	<input type="button" value="Next in List"/>	<input type="button" value="Notify"/>	<input type="button" value="Refresh"/>	<input type="button" value="Update/Display"/>



# Updating Citizenship

Citizenship information is required.

**Navigation:** Menu > Workforce Administration > Personal Information > Citizenship > Identification Data

Citizenship/Passport

Person ID [REDACTED]

Citizenship/Passport ?

\*Country  United States

Citizenship Status

Go To Row + -

Passport Information ?

\*Passport Number

Issue Date

Expiration Date

Country  United States

State

City

Authority

Comment

Save Return to Search Notify Update/Display



# Emergency Contacts – Contact Address/Phone tab

Navigation: Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact

**Contact Address/Phone** | Other Phone Numbers

Person ID [REDACTED]

### Emergency Contact

1 of 1 | View All

\*Contact Name  + -

Primary Contact      \*Relationship to Employee: Other

Same Address as Employee

Same Phone as Employee

#### Contact Address

Country: USA  United States

Address

#### Contact Phone

Phone



# Emergency Contacts – Other Phone Numbers tab

Contact Address/Phone | **Other Phone Numbers**

Person ID

**Emergency Contact** | 1 of 1 | View All

Contact Name | Relationship to Employee | Other |  Primary Contact | + | -

**Other Phone Numbers for Emergency Contact** | 1 of 1 | View All

\*Phone Type | Phone | Extension | + | -

**Save** | Return to Search | Previous in List | Next in List | Notify

Contact Address/Phone | Other Phone Numbers



# Managing Disability Information – Disability tab

Navigation: Menu > Workforce Administration > Personal Information > Disability > Disabilities

<b>Disability</b>	Accommodation Request	Accommodation Option	Accommodation Task
[Redacted]		Person ID	[Redacted]
<b>Disability Status</b>			
<input type="checkbox"/> Disabled			
USA			
<b>Section 503</b>			
Disability Status		<input type="text"/>	<a href="#">View History</a>
Disclosure Date		<input type="text"/>	
<b>Veteran</b>			
<input type="checkbox"/> Disabled Veteran			



# Approvals Tile

Navigation: Cardinal Homepage > Approvals Tile

Cardinal Homepage

Cardinal Message Board

0  
Message(s) published today

0  
Total active message(s)

Cardinal Portal

Approvals

1

Name Changes

Empl ID	Name
[blurred]	[blurred]
[blurred]	[blurred]

More...

Return From Leave

Empl ID	Name	Return
[blurred]	[blurred]	[blurred]
[blurred]	[blurred]	[blurred]

More...

Personal Details

Job Summary



# Approving Employee Self Service Transactions

## Agency HR Pending Approval listing

After reviewing required name change documentation the Agency HR Administrator navigates to the **Approvals** page to approve or deny submitted name changes.

View By <input type="text" value="Type"/>		
All	1	
Name Change	1	
<b>All</b>		1 row
<b>Name Change</b>	To	Routed
	Effective 01/21/2021	01/21/2021





# Approve or Deny With Comments

## Specific Name Change submission

---

**Summary**

Effective From 12/01/2020 Employee ID [REDACTED]

Name Format English

**Proposed Changes**

Name	After Approval	Before Approval
Last Name	[REDACTED]	[REDACTED]
Display Name	[REDACTED]	[REDACTED]
Formal Name	[REDACTED]	[REDACTED]
Name	[REDACTED]	[REDACTED]

▼ **Change Request Details**

Name Change Details >

**Approver Comments**

Approval Chain >



# Viewing Name Change History

<b>Biographical Details</b>	Contact Information	Regional	VA Person Info
-----------------------------	---------------------	----------	----------------

Mitchell Lyons Person ID [REDACTED]

Name 1-2 of 2 [View 1](#)

*Effective Date	12/01/2022		+ -
*Format Type	English		
Display Name	Mitchell Lyons		<b>Edit Name</b>
	10/25/2022	Effective Date	+ -
Format Type	English		
Display Name	Michael Wills		<b>View Name</b>



# Lesson Summary

4

## Managing Employee Personal Data

In this lesson, you learned:

- How to perform a Search Match
- How to enter new hire personal data
- How to review/approve employee self service transactions



# Lesson

5

## Managing Employee Job Data

This lesson covers the following topics:

- Hiring a new employee
- Maintaining telework data
- Adding a new employment instance
- Rehiring an employee
- Managing service dates



# Hiring an Employee – Add Org Relationship

The **Add Relationship** button functions as the save for personal data.

- It verifies that all required personal data is entered.
  - If not, a message will display identifying the required information that is missing.
- Click the tabs to go back to enter missing information; **DO NOT CLICK THE BROWSER BACK BUTTON.**
- Click the **Add Relationship** button once missing information has been added.

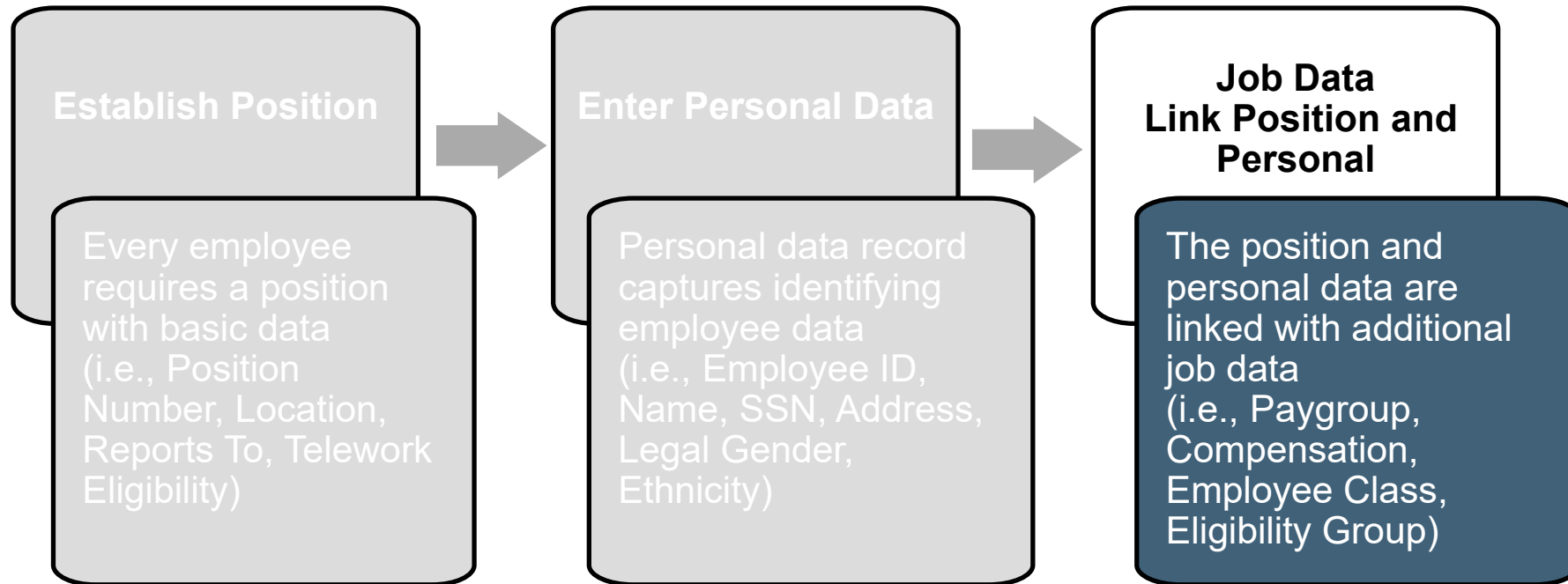
The screenshot shows a web interface for adding an organizational relationship. At the top, there are five tabs: 'Biographical Details', 'Contact Information', 'Regional', 'Organizational Relationships' (highlighted in green), and 'VA Person Info'. Below the tabs, the text 'Test Employee' is on the left and 'Person ID NEW' is on the right. The main heading is 'Choose Org Relationship to Add'. Underneath, there are three radio button options: 'Employee' (checked), 'Contingent Worker', and 'Person of Interest'. Below these is a label 'Empl Record' with the value '0'. Then, there is a label 'Select Checklist Code' with a dropdown menu showing 'Hire' and a blue arrow icon to its right. A red box highlights the 'Add Relationship' button. At the bottom, there are several buttons: a green button with a red 'X' over it, 'Notify', 'Refresh', 'Add', and 'Update/Display'.



# Job Data Information

Of the three HR Data types (Position, Personal and Job), Job Data is entered last into Cardinal.

Once we have an accepted job offer and all the required paperwork, the employee can be entered into Cardinal.





# Hiring an Employee – Work Location tab

## Job Data – Work Location


- Must have the **Position Number** the employee is being hired into

New Window | Help | Personalize Page

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

Employee [redacted] Empl ID [redacted]  
Empl Record 0

Work Location Details ⓘ

\*Effective Date 11/01/2020  Go To Row + -

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  

Position Management Record



# Hiring an Employee – Work Location tab (continued)

## Work Location Details

Key fields in this section:

- **Effective Date** represents hire or rehire date
  - Job effective date must be the same date as the Personal Data or a date later than the Personal Data
  - Example: Personal Data is dated 3/1/2022. The Job Data must be dated 3/1/2022 or later
- **\*Action / Reason** describes hire/rehire reason
  - Action activates HR and Payroll statuses
  - Reason activates Benefits status
- **Position Number** is the position to hire the person into.
  - Validate that the last action taken on the selected position is effective dated before the date of the hire effective date  
Example: Job Data is dated 3/1/2022. The Position effective date should be dated prior to 3/1/2022
  - The job code is associated with the position number
  - Information from the selected position populates several fields on the employee's job data page
- Key **Job Data** fields to be completed are **Employee Class, Pay Group, Frequency, Comp Rate Code, and Comp Rate**

**Note:** The **Action/Reason, Employee Class, and Job Code** are key fields in the VRS file nightly extract from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if the incorrect data is entered.



# Hiring an Employee – Job Information tab

## Job Data – Job Information

[New Window](#) | [Help](#) | [Personalize Page](#)

[Work Location](#) | **[Job Information](#)** | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Employee [redacted]      Empl ID [redacted]  
Empl Record 0

---

**Job Information Details** ? 1 of 1 Go To Row

Effective Date	11/01/2020	Action	Hire
Effective Sequence	0	Reason	New Hire
HR Status	Active	Job Indicator	Primary Job
Payroll Status	Active		

---

Job Code 69113      Security Officer III      SOC Code  
Entry Date 11/01/2020      Supervisor Name  
Supervisor Level      Test-Director of Corrections [redacted]  
Reports To DOCHR001      Full/Part Full-Time  
Regular/Temporary Regular      \*Officer Code None

Empl Class       Shift Rate   
Regular Shift Not Applicable      Shift Factor   
Classified Ind Classified

---

**Standard Hours** ?

Standard Hours	40.00	Work Period	W      Weekly
FTE	1.000000	<input type="checkbox"/> Adds to FTE Actual Count?	<input type="checkbox"/> Encumbrance Override



# Hiring an Employee – Job Information tab (continued)

## Job Information Details

Key fields in this section:

- **Empl Class** (Employee Classification) represents the different type of employees (i.e., Wage, Salaried, Adjunct, Valor, etc.)
  - Many options are dependent upon the Empl Class selected (i.e., the semi-monthly pay group of SM1 is not available for wage employees)
- **Standard Hours** is the number of hours per week the employee is scheduled to work
  - This defaults from the position but should be updated for quasi or part time employees
  - The FTE is calculated based on the standard hours (i.e., 36 hours/40 hours per week equals .90 FTE)

For further information on Employee Class or Standard Hours, see the job aids titled **HR351\_Employee Class Overview and Processing a Change in Full/Part/Quasi Status**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring an Employee – Payroll tab

## Job Data – Payroll Information

[New Window](#) | [Help](#) | [Personalize Page](#)

[Work Location](#) | [Job Information](#) | ~~[Job Indicator](#)~~ | **Payroll** | [Salary Plan](#) | [Compensation](#)

Employee [Redacted]      Empl ID [Redacted]  
Empl Record 0

**Payroll Information** ?      🔍 | ⏪ | ⏩ | 1 of 1 | ⏪ | ⏩

Effective Date 11/01/2020      [Go To Row](#)

Effective Sequence 0      Action Hire  
HR Status Active      Reason New Hire  
Payroll Status Active      Job Indicator Primary Job

Current

\*Payroll System Payroll for North America ▼  
Absence System Other ▼

**Payroll for North America** ?

Pay Group  🔍  
Employee Type  🔍  
Tax Location Code  🔍  
GL Pay Type   
Combination Code

Holiday Schedule  🔍

FICA Status Subject ▼  
[Edit ChartFields](#)



# Hiring an Employee – Payroll tab (continued)

## Payroll Information

Key fields in this section:

- **Payroll System** defaults to Payroll for North America and should not be changed
- **Absence System** identifies whether the employee's agency uses Cardinal Absence Management or if the employee is Wage
  - The option of **Absence Management** indicates the employee is salaried and the agency uses Cardinal Absence Management
  - The option of **Other** indicates either:
    - The agency uses a system other than Cardinal to manage time and absence information for its employees
    - The employee is hourly
- **Pay Group** identifies the pay cycle the employee is assigned (i.e., SM1: Semimonthly, BW1: Hourly)
- **Employee Type** defaults based on the pay group selected and identifies if the employee is salaried or hourly
- **Tax Location Code\*** identifies where the employee physically works. For payroll, this information is used to identify the state for state tax data for unemployment insurance as well as the employee's resident state for tax purposes.
- **Holiday Schedule** defaults based on the pay group selected and the employee type. It drives the holidays that appear on the employee's timesheet.
- **FICA Status** defaults to **Subject** for regular Social Security and Medicare tax withholdings. Update to:
  - **Exempt** if the employee is exempt from both Social Security and Medicare tax
  - **Medicare only** if the employee is only subject to Medicare tax withholdings

\*Whenever the **Tax Location Code** field is updated for existing employees, be sure to notify the Payroll Administrator that an update was made so they can review the Tax Data pages in Payroll for the employee.



# Hiring an Employee – Payroll tab (continued)

## Job Data – Payroll Absence Management System

Payroll System Payroll for North America

Absence System Absence Management

**Payroll for North America** ?

Pay Group SM1 Semimonthly Class (SATFRI07)

Employee Type S Salaried

Tax Location Code 760 Richmond (City)

GL Pay Type

Combination Code

Holiday Schedule HOLSAL Sal.HolSch

FICA Status Subject

[Edit ChartFields](#)

**Absence Management System**

Pay Group SM1 Semi-monthly Classified

**Setting**

Use Pay Group Eligibility

Use Pay Group Rate Type

Use Pay Group As Of Date

Eligibility Group VSDPELGGRP VSDP Eligibility Group

Exchange Rate Type

Use Rate As Of



# Hiring an Employee – Salary Plan tab

## Job Data – Salary Plan Details

This information defaults from the position and cannot be changed on this tab. If changes are needed go to the position.

[New Window](#) | [Help](#) | [Personalize Page](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | **Salary Plan** | [Compensation](#)

Employee [redacted] Empl ID [redacted]  
Empl Record 0

**Salary Plan Details** ⓘ

Effective Date 11/01/2020 Go To Row

Effective Sequence 0      Action Hire  
HR Status Active      Reason New Hire  
Payroll Status Active      Job Indicator Primary Job

Current ⓘ

**Salary Admin Plan** SW      ↻ Statewide  
Grade 4      ↻ Statewide Salary Grade 4  
Step      Grade Entry Date 11/01/2020  
Step Entry Date

Includes Wage Progression Rule

[Job Data](#) | [Employment Data](#) | [Earnings Distribution](#) | [Benefits Program Participation](#)

**OK** | Cancel | Apply Refresh

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)



# Hiring an Employee - Compensation Tab

## Job Data – Compensation Details

Compensation Details ? 1 of 2

Effective Date  Go To Row

Effective Sequence 0 Action

HR Status  Reason

Payroll Status  Job Indicator Primary Job

Current

Compensation Rate 2,083.333333  \*Frequency  Semimonthl

▶ Comparative Information ?

▶ Pay Rates ?

Default Pay Components

Pay Components ?

1-1 of 1

Amounts Controls Changes Conversion ||▶

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 STATE <input type="text"/>	<input type="text" value="0"/>	<input type="text" value="50,000.000000"/>	USD <input type="text"/>	A <input type="text"/>		<input type="text" value="+"/>	<input type="text" value="-"/>

Calculate Compensation

Job Data Employment Data Earnings Distribution Benefits Program Participation



# Hiring an Employee – Compensation Tab (continued)

## Compensation Details

Key fields in this section:

- **Compensation Rate** is the employee's gross pay amount based on the compensation rate and (pay) frequency
- **\*Frequency** is how often the employee is paid (i.e., Semi-monthly, Hourly, etc.)
- **Default Pay Components** this button must be clicked whenever a change is made to this page
- **Rate Code** identifies what type of pay the employee is receiving (i.e., State salary, Hourly, Special Rate Compensation, etc.)
- **Comp Rate** is the amount of the employee's compensation for the rate code selected
- **Currency** defaults to **USD** and should not be changed
- **Frequency** defaults to **A** for Annual or **H** for Hourly depending on the rate code selected

**Note:** If an employee should receive multiple types of compensation like **State** salary and **Special Pay** compensation, click the **Add a Row (+)** button to enter the additional compensation on the second row.

Pay Components ?

Amounts Controls Changes Conversion ||>

	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	STATE	0	50,000.000000	USD	A		+	-
2	SPPAY	0	5,000.000000	USD	A		+	-





# Hiring an Employee – Benefits Program Participation

## Benefit Status – Benefits Administration Eligibility

**Benefit Status** ⓘ

Benefit Record Number 0 Go To Row

Effective Date 06/10/2023

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Pay Rate Change

Reason FY24 Statewide Increase

Job Indicator Primary Job

\*Benefits System Benefits Administration

Annual Benefits Base Rate  USD

Benefits Employee Status Active

Current

[ACA Eligibility Details](#)

**Benefits Administration Eligibility** ⓘ

BAS Group ID OEC

OE State

Elig Fld 1	VSY0000	Elig Fld 2	181001000 <input type="text"/>	Elig Fld 3	N <input type="text"/>
Elig Fld 4	<input type="text"/>	Elig Fld 5	<input type="text"/>	Elig Fld 6	30194
Elig Fld 7	<input type="text"/>	Elig Fld 8	12-24 <input type="text"/>	Elig Fld 9	SF-GB <input type="text"/>

**Benefit Program Participation Details** ⓘ

Effective Date 08/19/2002

Benefit Program SAL

Currency Code USD

Salaried Employee Benefit Pgm



# Hiring an Employee – Benefits Program Participation link

## Benefit Status

Key fields in the Benefits Administration Eligibility section:

- **Elig Fld 2:** this value is provided to health benefit vendors and reflects the group (agency business unit) in which the employee is enrolled
- **Elig Fld 3:** this value indicates who will be entering time for the employee; for agencies who do not use Cardinal Absence Management or for those who utilize timekeepers this value will always be No for the employee.
- **Elig Fld 8:** this value indicates the contract length and number of pays (i.e., Salaried is 12-24 and Wage is 12– 26)
- **Elig Fld 9:** these values indicate the nature of the employee (i.e., fulltime, wage, retiree, etc.) and how the employee health premiums are paid

For further information on Benefit Eligibility fields, see the job aid titled **BN361 Overview of the Eligibility Configuration Fields**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring an Employee – Employment Data link

## Job Data – Employment Information

Probation Date & Employee Eligible for Telework?

**Employment Information**

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Organizational Instance** ?

Organizational Instance Rcd 0 Original Start Date [Redacted]  Override  
Last Start Date [Redacted] First Start Date [Redacted]  
Termination Date [Redacted]  Override  
Org Instance Service Date [Redacted]  Override

	Years	Months	Days
1	1	3	24

**Organizational Assignment Data** ?

**Instance Record**

Last Assignment Start Date [Redacted] First Assignment Start 10/01/2021  
Assignment End Date [Redacted]  
Home/Host Classification Home  
Company Seniority Date [Redacted]  Override  
Benefits Service Date [Redacted]  Override  
Seniority Pay Calc Date [Redacted]  Override

	Years	Months	Days
0	0	0	0
1	1	3	24
1	1	3	24

Time Reporter Data

Probation Date

Professional Experience Date

Last Verification Date

Business Title [Redacted] Position Phone [Redacted]

\*Employee Eligible for Telework? Employee Eligible for Telework  Tenure Status/Contract Type

Alternate Leave Plan   Alternate Work Schedule

SDP Effect Date



# Hiring an Employee – Employee Information

## Job Data – Employment Information

Key fields related to hiring an employee:

- **Probation Date:** this is the expiration date of probation, if applicable
- **Employee Eligible for Telework?:** this value indicates if the employee is eligible for telework based on your agency guidelines

**Note:** The employee's position must be Available for Telework in order for the Employee to be Eligible for telework. For more information regarding telework, see the job aid titled **HR351\_Managing Employee Teleworker Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**

- **Alternate Leave Plan:** this field is used to enter the employee's Leave Eligibility Group (i.e., VSDPELGGRP) for those agencies who do not use Cardinal for Absence Management.

**Note:** For agencies who do use Cardinal Absence Management, this field is greyed out here because this information is captured on the Payroll tab in the Absence Management System section at the bottom of the page.

# Hiring an Employee – Telework Agreement

**Navigation:** Menu > Workforce Administration > Job Information > Maintain Teleworkers

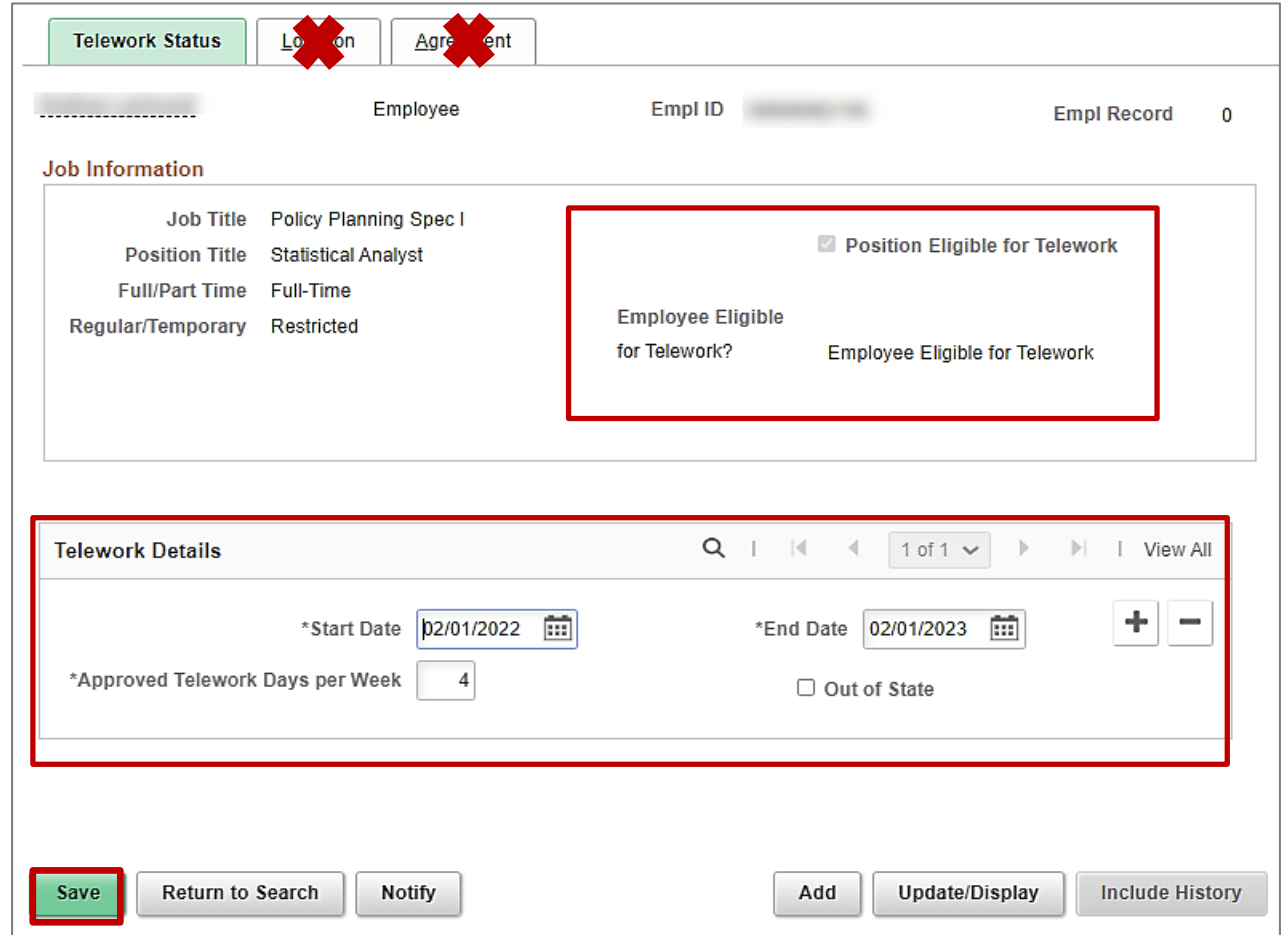
Review the **Job Information** section for **Position** and **Employee Eligibility for Telework**.

- A telework agreement can only be entered if both the position and employee are eligible

Telework agreements entered in the **Teleworker Details** section cannot overlap.

- If changes are needed to a telework agreement, the **End Date** of the previous agreement must be updated so it does not overlap with the **Start Date** of the new agreement

Telework agreements are typically entered for one year at a time.



Telework Status ~~Location~~ ~~Agreement~~

Employee Empl ID Empl Record 0

**Job Information**

Job Title	Policy Planning Spec I
Position Title	Statistical Analyst
Full/Part Time	Full-Time
Regular/Temporary	Restricted

Position Eligible for Telework

Employee Eligible for Telework? Employee Eligible for Telework

**Telework Details**

*Start Date	02/01/2022	*End Date	02/01/2023	+ -
*Approved Telework Days per Week	4	<input type="checkbox"/> Out of State		

Save Return to Search Notify Add Update/Display Include History

For further information on teleworking, see the job aid titled **HR351\_Maintaining Employee Telework Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring an Employee – Citizenship Status

Navigation: Menu > Workforce Administration > Personal Information > Citizenship > Identification Data

Person ID [blurred]

**Citizenship/Passport** [?] [Search] | [Navigation] 1 of 1 [Go To Row] [+] [-]

\*Country USA [Search] United States  
Citizenship Status Native [v]

**Passport Information** [?] [Search] | [Navigation] 1 of 1 [View All]

\*Passport Number [Text] [Go To Row] [Go To Row]

Issue Date [Calendar]

Expiration Date [Calendar]

Country USA [Search] United States  
State [Search]

City [Text]

Authority [Text]

Comment [Text] [Copy]

For further information on entering an employee’s citizenship information, see the job aid titled **HR351\_Viewing and Modifying Personal Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.




# New Hire/Rehire – Personal Data Only in Cardinal

When looking at the **Person Organizational Summary** page and only the person's name and employee ID show, it could be one of the following scenarios.

Staged employee →

### Person Organizational Summary

Simone Larmond Person ID 008! 

[Return to Search](#) [Notify](#)

New Hire Scenario	Rehire Scenario
Only personal data was entered into Cardinal to obtain the employee ID.	Only personal data was converted into Cardinal because they were terminated prior to 2021.

The New Employment Instance option is used in both scenarios to add an employee record to hire the employee.



# New Hire/Rehire - Adding New Employment Instance

The hire or rehire must be completed by creating a new employee record using the **Add Employment Instance** page. Make note of the employee ID number at the top of the **Person Organizational Summary** page and navigate to the **New Employment Instance** page using the following path:

**Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance**

## Add Employment Instance

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

[Find an Existing Value](#)

---

▼ **Search Criteria**

Search by:  begins with

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

[Search](#) [Advanced Search](#)

Enter the employee ID in the **Empl ID** field and click **Search**.





# Adding New Employment Instance Question

The following message displays.

Do you wish to open the Job Data associated to this emplid: [redacted] Employee Record: 0 (25101,91)

Yes No

Below is guidance as to when you select **Yes** or **No**.

Select **Yes** when

- Rehiring for the Same Agency
- Rehiring for same type (i.e., Salary to Salary, Wage to Wage)

This opens the current Job Data record page so you can add a new Effective Dated row and make any required updates.

The Employee Record # remains the same (i.e., 0)

Select **No** when

- Rehiring but to a different agency
- Rehiring for different type (i.e., Wage to Salary, Salary to Wage)

This opens a new Job Data record page since it is not the same agency or type. Unless the employee worked at your agency, you will not have access to the previous employee record.

The Employee Record is incremented by one (i.e., 1) to denote it is a different record for an employee that works or worked for the Commonwealth.

For further information on hiring or rehiring an employee, see the job aids titled **HR351 Completing a Hire** and **HR351 Completing a Rehire**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.



# Answer Yes: Job Data Opened for Employee Record 0

**New Hire:** Job data is blank so Employee Record 0 can be created

**Rehire:** Opens job data for Employee Record 0; click the **Add a Row icon (+)** to add rehire transaction to top of existing record

The screenshot displays the 'Work Location' tab of an HR system. At the top, there are navigation tabs: 'Work Location' (selected), 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'. Below these, the 'Employee' section shows 'Empl ID' and 'Empl Record 0', with the latter highlighted by a red box. The 'Work Location Details' section features a table with one row, also highlighted by a red box. The table includes fields for '\*Effective Date' (12/01/2021), 'Effective Sequence' (0), 'HR Status' (Inactive), 'Payroll Status' (Terminated), '\*Action' (Termination), 'Reason' (Conversion), and '\*Job Indicator'. A 'Go To Row' button with a '+' icon is positioned to the right of the table. Below the table, the 'Position Number' is CJS00203, and the 'Position Entry Date' is 02/01/1997. The 'Regulatory Region' is USA. The interface also includes a search icon, a 'Job History' link, and a 'Current' indicator.



# Answer No: New Employee Record is Created

**Rehire:** Employee Record is incremented by 1 digit

- Employee rehired to same agency as a different type (i.e., wage to salary)
- Employee rehired to a different agency

### New Employment Instance

Empl ID 00097582500

Empl Record 1

**Add Relationship**

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

Employee Empl ID [redacted]

**Empl Record 1**

#### Work Location Details

\*Effective Date 07/28/2023 Job History Go To Row + -

Effective Sequence 0 \*Action Hire

HR Status Active Reason

Payroll Status Active \*Job Indicator

Calculate Status and Dates

Position Number [ ] Current

Override Position Data

Position Entry Date [ ]



# Rehiring an Employee – Employment Data link

## Employment Data - Person Employment Dates

- This section is only available for Salaried employees; wage employees do not have a **Person Employment Dates** section on this page

Alternate Leave Plan    Alternate Work Schedule

VSDP Enroll Date

Agency Use Field 1  Agency Use Field 2  Agency Use Field 3

**Person Employment Dates** ?

Continuous State Service Date	<input type="text"/> <input type="button" value="Calendar"/>	Previous State Service Months	<input type="text" value="0"/>
Annual Leave Eligibility Date	<input type="text"/> <input type="button" value="Calendar"/>	Veteran's Service Credit Months	<input type="text" value="0"/>
		Total Service Credit Months	0

USA

---

Job Data      Employment Data      Earnings Distribution      Benefits Program Participation



# Rehiring an Employee – Employee Information

## Job Data – Employment Information

Fields at the top of the page (not shown):

- **Probation Date:** this is the expiration date of probation, if applicable
- **Employee Eligible for Telework?:** this value indicates if the employee is eligible for telework based on your agency guidelines

Fields at the bottom of the page (shown):

- **Continuous State Service Date:** auto-populates based on the salaried employee's state hire or rehire date
- **Annual Leave Eligibility Date:** this date impacts the employee's annual leave accrual rate
- **Previous State Service Months:** this value is obtained by using the Managing Service Dates calculator; the value entered here updates the **Total Service Credit Months** field
- **Veteran's Service Credit Months:** this value is obtained by using information on the employee's DD214 and using the Managing Service Dates calculator; the value entered here updates the **Total Service Credit Months** field
- **Total Service Credit Months:** this value is populated by the **Previous State Service Months** and **Veteran's Service Credit Months** fields.

For further information on Service Dates and the Service Dates calculator, see the job aids titled **HR351\_Managing Service Dates and Breaks in Service** and **HR351\_Managing Service Dates Calculator**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.



# Agency Next Steps after Hire/Rehire/Transfer

- ❑ Update employee's personal data if applicable
  - For further information on updating personal data, see job aid titled, **HR351\_Viewing and Modifying Personal Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.
  
- ❑ Communicate with Employee to update state and federal withholding forms, direct deposit elections, etc. per established business practices
  
- ❑ Coordinate with agency Benefits Administrators to ensure that eligible employees complete their benefit elections (within 30 days per OHB policy)
  - For further information on completing benefit elections, see job aid titled, **BN361\_Completing a New Hire Enrollment**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.
  
- ❑ Coordinate with agency Time and Labor (TL) Administrators to ensure that all employees are assigned the applicable Work Schedule (can be assigned by either a TL Administrator or the employee's supervisor), review their TA eligibilities (i.e., overtime, comp leave, etc.) and update their leave balance, if applicable
  - For further information on assigning work schedules and entering leave balance adjustments, see job aids titled, **TA\_Maintaining Employee Work Schedules** and **TA374\_Managing Balance Adjustments**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.





# Lesson

6

## Managing Job Data Updates

This lesson covers the following topics:

- Intra-Agency Transfer
- Inter-Agency Transfer
- Leave of Absences
- Separations



# Intra-Agency Transfer Overview

- Movement of employee from one position to another within the same Agency
- Agency HR updates employee's **Job Data** page and all applicable data fields (i.e., compensation)
- **Action** and **Action Reason** fields maintain active HR and Payroll Statuses
- When completing a change from a wage position to another wage position it is no longer necessary to terminate the wage/hourly employee and rehire them into a new wage/hourly position. To complete this type of transaction HR Admin will simply insert a row and select Action of **Transfer** and the applicable Reason. Use your agency's Configuration Workbook to determine the appropriate Reason.
- When moving an employee from a Salary position to a Wage position or a Wage position to a Salary position the HR Admin will simply insert a row and select Action/Reason of **Termination/Resignation**. Then the new employee record will be created by adding a new employee instance to hire the employee into the new position using the Action/Reason for the movement **into** the new position is **Hire/New Hire**.

Be mindful that the Benefits Administrator will need to re-elect benefit elections of the employee once the transfer process to the receiving agency is complete. See job aid titled **361 Benefits Quick Reference Guide** for more details. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For detailed information on Intra-Agency Transfers, see the job aid titled **HR351 Managing the Intra-Agency Transfer Process**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.





# Intra-Agency Transfer – Same Employee Type

Navigation: Menu > Workforce Administration > Job Information > Job Data

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

Work Location Details ? 1 of 2

\*Effective Date: 11/01/2020 📅 Go To Row + -

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

\*Action: Transfer ▼

Reason: Promotion ▼

\*Job Indicator: Primary Job ▼

Position Number: DLS00005 🔍 Senior Associate Current

Override Position Data

Position Entry Date: 09/10/2006  Position Management Record

Regulatory Region: USA United States

Company: DLS Div of Legislative Services

Business Unit: 10700 Div of Legislative Services

Department: 10700 Div of Legislative Svcs Dept

Department Entry Date: 09/10/2006

Location: CENTR Division of Legislative Servic

Establishment ID: DLS 🔍 Division of Legislative Servic Date Created: 12/10/2020



# Updating Employee Compensation

- Employee Job Record Pay Components:
  - State salary
  - Non-state salary
  - Special pay SPPAY Special Rate Compensation
  - Hourly rate
- Compensation parameters (i.e., Pay Bands) only overridden by DHRM
  - Errors if pay rate exceeds limits
  - Discipline pay rate changes at least 5%
- Submit mass uploads (i.e., Agency-wide compensation actions) to PPS for upload
- Bonuses are not tracked/paid through Employee Job Record (covered later in course)
- Payroll Administrator runs reports and queries for the reconciliation process

For further details on Employee Compensation Changes, see the job aid titled **HR351 Updating an Employee's Compensation**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further details on Rewards and Recognitions, see the job aid titled **HR351 Rewards and Recognition**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further details on how to complete a mass upload see the job aid titled **Performing a Mass Upload**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Updating Employee Compensation (continued)

New Window | Help | Personalize Page

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Work Location Details** ?

\*Effective Date: 02/12/2021 [Calendar Icon]

Effective Sequence: 0

HR Status: Active

\*Action: Pay Rate Change [Dropdown]

Reason: Competitive Salary Offer [Dropdown]

Go To Row [Button] + - [Buttons]

**Pay Components** ?

Amounts | Controls | Changes | Conversion ||>

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 STATE [Search]	0	55,000.000000 [Currency]	USD [Search]	A [Search]		+ [Button]	- [Button]

Calculate Compensation [Button]



# Inter-Agency Transfer Overview

An Inter-Agency Transfer is defined as the movement of an employee from one Agency to another Agency. The key to a seamless transfer is communication between the receiving agency and sending agency HR Administrators.

**Receiving Agency** - Verify that all necessary data is in hand prior to moving forward with keying the transfer transaction.

- Ensure that all position updates have been made (i.e., correct effective date, job code, location code and telework eligibility)
- Confirm the Effective Date of the transfer with the sending agency to ensure no break in service
- Obtain the employee's current benefit elections (if applicable) so they can be reviewed upon completion of transfer
- Obtain the employee's leave balance (if applicable) in case a balance adjustment is needed

**Sending Agency** - Verify that all necessary information is obtained prior to moving forward with keying the transfer transaction.

- Confirm the Effective Date of the transfer with the receiving agency to ensure no break in service i.e., consider using LWOP
- Provide the employee's leave balances (if applicable) in case a balance adjustment is needed
- Provide the employee's current benefit elections (if applicable) to the receiving agency

Both agencies must key transactions in Cardinal to complete the Inter-Agency transfer process.

- Sending agency enters the **Termination / Transfer Out** transaction first
- Receiving agency checks the **Person Organizational Summary** page to verify if the transaction has been entered by the sending agency
- After seeing the transaction on the **Person Organizational Summary** page, the receiving agency enters their portion of the transaction using the **New Employment Instance** option to create a new employee record\* and using the Action / Reason of **Hire / Transfer In**

\*If the employee is returning to the receiving agency, it may be possible to use their existing employee record already established at the receiving agency.



# Inter-Agency Transfer – Keeping Benefits Active

The Action Reasons of “**Transfer Out**” used by the sending agency and “**Transfer In**” used by the receiving agency ensure the employee maintains an active Benefits Status.

**Once the receiving agency has determined that the employee has been terminated from the sending agency, proceed with entering the transaction in Cardinal.**

- When an employee is active in both agencies, Anthem, Aetna, and other Health Care providers receive data files that show the employee as active in two agencies, which results in the records cancelling each other out.
- Waiting for the sending agency to process the termination to be fully processed by the vendors before receiving the hire into the new agency.
- The **Reason** of “**Transfer In**” reactivates the employee’s **HR Status** and **Payroll Status** after they are terminated by the sending agency.

The Receiving Agency’s Benefits Administrator will need to review the transferred employee’s information to ensure the transfer is done correctly and with as little disruption to the employee as possible. See job aid titled **361 Benefits Quick Reference Guide** for more details. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Inter-Agency Transfers, see the job aid titled **HR351 Managing an Inter-Agency Transfer**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Inter-Agency Transfer – Sending Agency Transaction

Navigation: Menu > Workforce Administration > Job Information > Job Data

- Action - Termination
- Reason - Transfer Out

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

Employee [Redacted] Empl ID [Redacted] Empl Record 0

Work Location Details ?

\*Effective Date 01/04/2021 | Job History | Go To Row + -

Effective Sequence 0

HR Status Inactive | \*Action Termination

Payroll Status Terminated | Reason Transfer Out

\*Job Indicator Primary Job

Position Number UMWST01 | Instructor | Current

Override Position Data

Position Entry Date 11/10/2019 |  Position Management Record

Regulatory Region USA | United States

Company UMW | University of Mary Washington

Business Unit 21500 | University of Mary Washington

Department 203101 | Art and Art History

Department Entry Date 11/10/2019

Location CENTR | University of Mary Washington

Establishment ID UMW | University of Mary Washington

Date Created 01/07/2021



# Inter-Agency Transfer – Receiving Agency Transaction

**Navigation:** Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance

- Adds new employee record
- **Action - Hire**
- **Reason - one of the Transfer In options**

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

Employee Empl ID [REDACTED] **Empl Record 1**

Work Location Details ? 1 of 1

\*Effective Date 01/04/2021 Job History Go To Row + -

Effective Sequence 0 \*Action Hire

HR Status Active Reason Transfer In Promotion

Payroll Status Active \*Job Indicator Primary Job

Position Number DOCHR002 Test-Corr Ent Personnel Asst Current

Override Position Data

Position Entry Date 01/04/2021  Position Management Record

Regulatory Region USA United States

Company DOC Dept of Corr - Central Admin

Business Unit 70100 Dept of Corr - Central Admin

Department 125 PROCUREMENT & RISK MGMT

Department Entry Date 01/04/2021

Location CRO Central Regional Office

Establishment ID DOC Dept of Corrections Date Created 01/07/2021



# Payroll Processing Calendar Considerations

HR Administrators should be mindful of the Payroll Processing Calendar when entering transactions.

- HR transactions that impact pay and have an effective date within or prior to the end date of the pay cycle being processed should be held and entered the day after Confirm Pay.
- Transactions entered between the Data Freeze and Confirm Pay, with an effective within or prior to the end date of the pay cycle being processed, may cause the employee's paycheck to drop off the payroll register or otherwise impact the employee's pay in an unexpected manner.
- If a change is needed for the employee during the current payroll cycle that is in progress, please contact your agency Payroll Administrator immediately for guidance and assistance.

HCM Semi-Monthly Schedule - Calendar Year 2023									
Pay period End SM1 SM1MMDDYY	Pay period End SM2 SM2MMDDYY	Create Paysheets	Data Freeze Noon	Confirm Pay 1:00 PM	Time Sheet Deadline 10:00 PM	PAYDAY	Off Cycle	Off Cycle Confirm 1:00 PM	Off Cycle Pay Date
1/9/2023	1/15/2023	1/3/2023	1/5/2023	1/9/2023	1/12/2023	1/13/2023	OSM011322	1/12/2023	1/17/2023
01/24/2023	1/31/2023	1/13/2023	1/24/2023	1/26/2023	1/31/2023	2/1/2023	OSM020121	1/31/2023	2/2/2023
02/09/2023	2/15/2023	2/1/2023	2/8/2023	2/10/2023	2/15/2023	2/16/2023	OSM021622	2/15/2023	2/17/2023
02/24/2023	2/28/2023	2/16/2023	2/21/2023	2/23/2023	2/28/2023	3/1/2023	OSM030122	2/28/2023	3/2/2023
3/9/2023	3/15/2023	3/1/2023	3/8/2023	3/10/2023	3/15/2023	3/16/2023	OSM031622	3/15/2023	3/17/2023
3/24/2023	3/31/2023	3/16/2023	3/23/2023	3/27/2023	3/30/2023	3/31/2023	OSM033122	3/30/2023	4/3/2023
4/9/2023	4/15/2023	3/31/2023	4/6/2023	4/10/2023	4/13/2023	4/14/2023	OSM041422	4/13/2023	4/17/2023
4/24/2023	4/30/2023	4/14/2023	4/21/2023	4/25/2023	4/28/2023	5/1/2023	OSM050122	4/28/2023	5/2/2023
5/9/2023	5/15/2023	5/1/2023	5/8/2023	5/10/2023	5/15/2023	5/16/2023	OSM051622	5/12/2023	5/17/2023
5/24/2023	5/31/2023	5/16/2023	5/23/2023	5/25/2023	5/31/2023	6/1/2023	OSM060122	5/31/2023	6/2/2023

Sample Payroll Calendar

**Data Freeze:** Limited HR Changes will be pulled into pay checks





# When to Key or When to Wait or Work with Payroll Admin

Tell me when it's safe to key the scenario below and when to work with Payroll Administrator for guidance.

**System Date (Current Date): 10/22/2023**

Pay Period End Date  
for Current Cycle  
10/24/2023

Data Freeze for  
Current Cycle  
10/21/2023

Confirm Pay for  
Current Cycle  
10/26/2023

Scenario 1: Need to key a payrate change for an employee effective **10/25/2023**



Transaction effective date in next pay period

Scenario 2: Need to key a promotion with a salary increase, effective **10/10/2023**



Wait or follow up with Payroll Administrator

Scenario 3: Need to key a lateral transfer due to disciplinary reasons with a salary decrease, effective **10/1/2023**



Wait or follow up with Payroll Administrator

When is the first available date to key the transactions in scenario 2 & 3?

**10/27/2023**

Day after Confirm Pay



# HR and Payroll Status for Leaves of Absence

Navigation: Menu > Workforce Administration > Job Information > Job Data

## Leave of Absence (Paid)

The screenshot displays the 'Work Location Details' for a 'Paid Leave of Absence'. The 'Effective Date' is 11/01/2020 and the 'Effective Sequence' is 0. The 'HR Status' is 'Active' and the 'Payroll Status' is 'Leave With Pay'. The '\*Action' is 'Paid Leave of Absence', the 'Reason' is 'Personal', and the '\*Job Indicator' is 'Primary Job'. The position is 'Senior Associate' with position number 'DLS00005' and entry date '09/10/2006'. The company is 'DLS' (Div of Legislative Services) in the 'USA' (United States).

## Leave of Absence (Unpaid)

The screenshot displays the 'Work Location Details' for an 'Unpaid Leave of Absence'. The 'Effective Date' is 11/01/2020 and the 'Effective Sequence' is 0. The 'HR Status' is 'Active' and the 'Payroll Status' is 'Leave of Absence'. The '\*Action' is 'Leave of Absence - Unpaid', the 'Reason' is 'FMLA - EE Medical', and the '\*Job Indicator' is 'Primary Job'. The position is 'Senior Associate' with position number 'DLS00005' and entry date '09/10/2006'. The company is 'DLS' (Div of Legislative Services) in the 'USA' (United States).



# Additional Leave Related Fields

**Expected Return Date** – date the employee is expected to return from leave according to leave paperwork

**STD Claim Number** – claim number obtained from paperwork; can be entered after entering the leave transaction

**Turn Off Auto Pay** – change to Yes to stop automatic salary payments and additional pay payments for certain leave types

Location RICH RICHMOND HEADQUARTERS

Establishment ID DOLI Dept of Labor and Industry Date Created

Last Start Date 02/01/2022

Expected Return Date

STD Claim Number

Override Last Date Worked

Layoff Notice Date

Recall Eligibility Flag

Last Date Worked

Turn Off Auto Pay

Yes No

Job Data Employment Data Earnings Distribution Benefits Program Participation

Save Return to Search Previous in List Next in List Notify Refresh

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



# Payroll tab - Holiday Schedule

- Update from HOLSAL to HOLSTD for Short-Term Disability, Long-Term Disability and Workman's Comp

**Payroll Information** ? 1 of 2

Effective Date: 03/30/2023 Go To Row

Effective Sequence: 0      Action: Paid Leave of Absence

HR Status: Active      Reason: Short-Term Disability

Payroll Status: Leave With Pay      Job Indicator: Primary Job

Current

Payroll System: Payroll for North America

Absence System: Other

**Payroll for North America** ?

Pay Group: SM1 Q Semimonthly Class (SATFRI07)

Employee Type: S Q Salaried

Tax Location Code: 760 Q Richmond (City)

GL Pay Type:

Combination Code:

Holiday Schedule: HOLSAL Q Sal.HolSch

FICA Status: Subject Q [Edit ChartFields](#)

Job Data      Employment Data      Earnings Distribution      Benefits Program Participation

**Save**    Return to Search    Previous in List    Next in List    Notify    Refresh    Update/Display    Include History



# Notepad Functionality

Example of Notepad functionality - Use to capture key notes about updates made to job data.  
Especially helpful when **Action/Reason** is **Data Change/Data Change**.

New Window | Help | Personalize Page

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Work Location Details** ? Q | ◀ ▶ 1 of 2 ▼ ▶ ▶


*Effective Date	02/08/2021	<b>Go To Row</b>	<b>+</b>	<b>-</b>
Effective Sequence	0	*Action	Paid Leave of Absence <span>▼</span>	
HR Status	Active	Reason	FMLA <span>▼</span>	
Payroll Status	Leave With Pay	*Job Indicator	Primary Job <span>▼</span>	

Position Number: CJS00400 ? Custom Service Specialist Current



# Non-Confidential Notes and Comments

Notepad functionality

 **Selected Note**

► **Instructions**

**Add Performance Note**



**Applications**

Employee ID	██████████	██████████	Created	12/11/2020 3:56PM
Empl Rcd Nbr	0		Creator	██████████
Effective Date	2020-12-11		Last Update	
Effective Sequence	0		Updated By	

---

Subject

Note Text





# Separations Overview

Types of **Separations** covered in this section of the course:

## **Involuntary**

- Termination is an employee's involuntary termination from state service. Examples include Layoff, Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.

## **Voluntary**

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

There are two Action Reason combinations related to an employee's death. One is Termination/Death, and the other is Termination/Death with Dependent. The difference between the two events is that the benefits terminate on different dates. When an employee passes away, the Benefit Administrator should review the employee's current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination.

After the Termination transaction is saved, all HCM functional areas are updated appropriately:

- Benefits status is updated in Cardinal Benefits (BN); COBRA eligibility is triggered if applicable.
- Time Reporter is updated for Cardinal TA and leave accruals stop.
- The updated Payroll status does not create a Paysheet for the employee.



# Separate Employees

- Effective date of Termination transactions is generally the day immediately following last day worked
  - Example: If employee last worked on Friday, Termination Effective Date is Saturday
- The employee email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s.
  - The HR Administrator obtains the personal email address and updates the email address in Cardinal from Agency Provided to Employee Provided.
  - HR Administrator must also check the personal email address as Preferred.
  - Selecting this email address as preferred is the driving factor for post-employment system access.
- Separated employees will then have access to Cardinal for 18 months after the Termination Date. After 18 months, this access ends automatically. Agency HR does not need to go back in and remove the personal email address.

For further information on Separating Employees, see the job aid titled **HR351 Separation Statues**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.





# Separations - HR Status and Payroll Status

Navigation: Menu > Workforce Administration > Job Information > Job Data

New Window | Help | Personalize Page

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Work Location Details** ? Q | ◀ ▶ 1 of 2 ▶ ▶

*Effective Date	02/12/2021 <span>📅</span>	<b>Go To Row</b>	<b>+</b>	<b>-</b>
Effective Sequence	0	*Action	Termination <span>▼</span>	
HR Status	Inactive	Reason	Resignation <span>▼</span>	
Payroll Status	Terminated	*Job Indicator	Primary Job <span>▼</span>	

Position Number  🔍 State Eng Materials Current  
**Override Position Data**

Position End Date 12/31/2020



# Lesson Summary

6

## Managing Job Data Updates

In this lesson, you learned:

- How to complete an Intra-Agency Transfer
- How to complete an Inter-Agency Transfer
- How to maintain employee leave status
- How to separate an employee



# Lesson

7

## Managing Employee Additional Pay and Rewards & Recognition

This lesson covers the following topics:

- Adding Additional Pay
- Updating Additional Pay
- Stopping Additional Pay
- Entering Rewards and Recognition



# What is Considered Additional Pay

Additional pay processes the additional amount of pay that is to be added to the employee's paycheck per pay period.

- Fixed, Recurring Payments in addition to Regular Pay
  - Cell Phone Reimbursement
  - Adjunct Pay
  - Temporary Pay
- For Retroactive Effective Dates:
  - Payroll Admin calculates retroactive amount
  - Payroll Admin processes the payment in SPOT
- For partial amounts due to Mid-Pay Period changes:
  - Effective Date is the actual date the additional pay became effective
  - Payroll Admin calculates prorated amount
  - Payroll Admin processes the payment in SPOT
- Only HR can enter Additional Pay transactions

For further information on Additional Pay, see the job aid titled **HR351 Processing Additional Pays**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

# Additional Pay – Payroll Menu

Navigation: Menu > Payroll for North America > Employee Pay Data USA > Create Additional Pay

### Create Additional Pay

Employee  Empl ID  Empl Record 0

**Additional Pay** Find | View All First ◀ 1 of 1 ▶ Last  
\*Earnings Code  Misc Agency Supplemental Pay 1

**Effective Date** Find | View All First ◀ 1 of 1 ▶ Last  
Effective Date

**Payment Details** Find | View All First ◀ 1 of 1 ▶ Last  
\*Addl Seq Nbr  End Date   
Rate Code  Reason   
Earnings   
Hours  Hourly Rate   
Goal Amount  Goal Balance   
Sep Check Nbr   
 OK to Pay  Disable Direct Deposit  
 Prorate Additional Pay

**Applies To Pay Periods**  
 First  Second  Third  Fourth  Fifth

**Job Information**

**Tax Information**



# Additional Pay Earnings Codes

Here are the earnings codes HR Administrators are responsible for managing.

Typical Additional Pay Earnings Codes				
Earn Code	Description	Add to Gross Income	Taxable	Notes
CAR	Reimb Use of Personal Car	Y	Y	
CCR	Company Car	N	Y	
MIL	Military Supplement	Y	Y	
MNT	Mobile Device Nontaxable	Y	N	
MTB	Mobile Device Taxable	Y	Y	
SEV	Work Study Student	Y	Y	
TMN	Temp Pay Non Paid Agys	N	N	
TMP	Temporary Pay	Y	Y	
TPD	Taxable Per Diem	Y	Y	
TTR	Taxable Tuition	Y	Y	
VRS	VRS Contribution Base	N	N	Loaded by Batch Program
PRW	Premium Reward	Y	Y	Loaded by Interface



# Agency Specific and Higher Education Earnings Codes

<b>Agency Specific Additional Pay Earnings (e.g. supplement for working conditions)</b>				
<b>Earn Code</b>	<b>Description</b>	<b>Add to Gross Income</b>	<b>Taxable</b>	<b>Notes</b>
TXB	Misc Agency Specific Pay	Y	Y	
SP1	Misc Agency Supplemental Pay 1	Y	Y	
SP2	Misc Agency Supplemental Pay 2	Y	Y	
SPA	Misc Agency Specific Pay Amt	Y	Y	
AGY	Misc Agency Specific Pay	Y	Y	
<b>Typical Additional Pay Earnings for Higher Education</b>				
<b>Earn Code</b>	<b>Description</b>	<b>Add to Gross Income</b>	<b>Taxable</b>	<b>Notes</b>
WSS	Work Study Student	Y	Y	
SSN	Student Stipend Non Taxable	Y	Y	
SST	Student Stipend Taxable	Y	Y	
FOT	Faculty Other Pay (Adjust for Salary)	Y	Y	
AJT	Adjunct Faculty	Y	Y	



# Rewards and Recognition – Leave Rewards

Agency HR runs by-agency Rewards and Recognition Report

- YTD totals by Employee and by Type (confirm/deny compliance)
- Includes both Leave and Monetary Rewards

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

## Leave Reward

- Agencies **NOT** using Cardinal Absence Management
  - Enter Leave Reward information through Cardinal **Rewards and Recognition** page
  - Also enter Leave Reward hours in external leave system of record
  - Cardinal does not interface to external leave systems of record
- Agencies using Cardinal Absence Management
  - Enter Leave Reward as balance adjustment or entitlement in Cardinal Absence Management
  - Consolidated reporting pulls Leave Awards from **Rewards and Recognition** page and Cardinal Absence Management to show statewide totals

For further information on how to enter the balance adjusts into Cardinal, see the job aid titled **TA374 Managing Absence Balances**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.





# Rewards and Recognition – Monetary Rewards

## Monetary Bonus

- Agency HR tracks employee's:
  - Written Agreement
  - Expiration date of the Written Agreement per incentive bonus
  - Payment Installments (singular or multiple – as needed)
- Agency HR updates and submits Excel spreadsheet to Agency Payroll to load into the Single Use Payroll Online Tool (SPOT) for payment
- For large volumes, optionally submit a file of rewards and recognition using the mass upload process

For further information on Rewards and Recognition see the job aid titled **HR351 Rewards and Recognition**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Rewards and Recognition Types

<b>Cardinal Rewards and Recognition tracks the following:</b>	
529	Sign On/Retention 529 PMT
ALI	Annual Leave Incentive
ERB	Employee Recognition Bonus
ERL	Employee Recognition Leave
ERN	Employee Recognition Non Mon
ESL	Employee Suggestion Leave
ESP	Employee Suggestion PMT
IBB	Inband Bonus
PBB	Project Based Bonus
RLP	Referral PMT
RNB	Retention Bonus
SAL	Service Award Leave
SOB	Sign on Bonus
SOL	Sign on Leave
SRS	Sign/On/Retention Student Load



# Rewards and Recognition Page

Navigation: Menu > Workforce Development > Reward and Recognition

[New Window](#) | [Help](#) | [Personalize Page](#)

**Rewards and Recognition**

Employee Name: [Redacted] Employee ID: [Redacted]  
Business Unit: 70100 Dept of Corr - Central Admin Empl Record: 0  
Position: DOCHR022 Security Officer III Critical/Hard to Hire: N

**Reward** 1 of 1 | View All

Reward ID: 1 + -

**Authorization/Written Agreement** 1 of 1 | View All

\*Effective Date: 11/15/2020  \*Creation Date: 11/18/2020  + -  
Expiration Date: 11/15/2021  \*Written Agreement? Yes   
\*Reward Type: SOB  Sign On Bonus  
Authorized Hours: 0.00  Authorized Amount: \$5,000.00   
YTD Hours: 0.00  YTD Amount: \$0.00   
Comments:   
254 characters remaining

**Award Payouts** 1 of 2 | View All

\*Award Date: 11/21/2020  Award Hours: 0.00  Award Amount: \$2,500.00  + -  
\*Award Date: 12/21/2020  Award Hours: 0.00  Award Amount: \$2,500.00  + -



# Lesson Summary

7

## Managing Employee Additional Pay and Reward & Recognition

In this lesson, you learned:

- How to Add Additional Pay
- How to Modify Additional Pay
- How to Stop Additional Pay
- How to Enter Rewards and Recognition



# Lesson

8

## Running Reports and Queries

This lesson covers the following topics:

- HCM Reports Catalog
- Accessing and Running a Report
- Accessing and Running a Query



# HCM Reports Catalogs

The **Human Capital Management (HCM) Human Resources Reports Catalog** contains queries and reports specific to the Human Resources functional area.

The **HCM Human Resources Reports Catalog** can be found on the Cardinal website under **Resources**. There is a reports catalog available for each of the functional areas. (i.e., Benefits, Payroll and Time and Attendance)

- **Cardinal SW NAV225 Cardinal Reporting (HCM)** Web Based Training (WBT) course provides training and interactive demonstrations that cover the fundamentals of how to run or access reports and queries. This course is available in Cardinal Learning and on the Cardinal Website.
- Reports/queries may be used by more than one functional area; thus, you may need to use the search/find feature to locate a specific report/query that may be in a different functional area.

## In Cardinal:

- To run a report, the full navigation path for a specified report can be found in any of HCM Reports Catalogs.
- To run a query, Navigate to: **Menu > Reporting Tools > Query > Query Viewer** and search for the query name

For further information on reports and queries in Cardinal, see the Reports Catalog titled **Cardinal HCM (Human Resources, Benefits, Payroll or Time and Attendance) Reports Catalog**. The Cardinal HCM Reports Catalogs are located on the Cardinal under **Resources**.



# Lesson Summary

8

## Running Reports and Queries

In this lesson, you learned:

- How to access the HCM Reports Catalog
- How to run Reports
- How to run a Query



**Next Two Topics are for VPA  
Covered Employees only**





# Lesson

9

## Managing Additional HR Data for VPA Covered Employees

This lesson covers the following topics:

- Entering and Maintaining Disciplinary Actions
- Entering and Maintaining Performance Ratings



# Entering and Maintaining Disciplinary Actions

## Entering and Maintaining Disciplinary Actions Overview

The Cardinal Disciplinary Action pages are used to record and track written notices and disciplinary actions. In addition, when the disciplinary action results in a change to the employee's job classification or compensation, an update to the employee's Job Record is required to impact the HR and Payroll functional areas (e. g., demotions, reductions in pay, terminations). DHRM will allow agencies to delete written notices and the associated disciplinary actions from the disciplinary action pages vs. requiring DHRM intervention.

Written notices can only be entered for VPA covered employees. Cardinal will not allow the user to enter a written notice for a non-VPA employee.

The Agency HR Administrator enters the written notice, along with the related details, which include the date of the offense, the nature of the offense, and any relevant agency notes. The expiration date of the written notice will default based on the group level. No manual updates will be made to this field. Agency HR can view the written notices via the online page or by using custom reports and queries. If there is a reverse or update to the disciplinary action, Agency HR will have the ability to update as required on Disciplinary Actions page.

However, DHRM involvement is still required to modify the employee's job data record and reverse the disciplinary action. This will require a ticket to be created.

Agency HR Administrators will have display only access to Disciplinary Actions entered by other agencies for their active employees.



# Types of Disciplinary Actions

After a written notice has been entered, the agency will record the disciplinary actions associated with the written notice. The types of Disciplinary Actions include:

- Disciplinary Pay Reduction (must accompany a Disciplinary Lateral Transfer and Demotion)
- XFR Invol Demotion Discipline
- Lateral Disciplinary XFR
- No Disciplinary Action
- Suspension
- Term– Involuntary (Violation of Standards of Conduct)

After recording this information in the Disciplinary Actions page, the employee's job data is updated by adding a new row to process the disciplinary action.

For further information on completing a Disciplinary Actions, see the job aid titled **HR351 Entering and Maintaining Disciplinary Actions**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Disciplinary Actions Page

Navigation: Menu > Workforce Administration > Labor Administration > Record Disciplinary Actions

**Written Notice** | **Disciplinary Action** | **Disciplinary Resolution**

Business Unit 76500  
Person ID [Redacted]  
Total Incident 0  
Empl Record 1

**Written Notice** | 1 of 1 | View All

\*Type [ ] [Q] [ + ] [ - ]  
\*Reported Date 12/10/2020 [Calendar]  
\*Description [ ] [Q]  
Supervisor ID [ ] [Q]  
Expiration Date [ ]

**Offense Information** | 1 of 1 | View All

\*Offense Code [ ] [Q] [ + ] [ - ]  
Offense Date [ ] [Calendar]

**Save** | **Return to Search** | **Previous in List** | **Next in List**



# Entering and Maintaining Performance Rating

## Performance Rating Overview

The Department of Human Resource Management (DHRM) maintains annual performance cycles and cycle effective dates. DHRM also communicates the applicable open/closed dates through normal business processes. Standard annual statewide employee performance management cycle is 12-month period from October 25 – October 24

Performance Ratings are annually collected and entered for all VPA employees.

- Four possible ratings:
  - X – Extraordinary Contributor
  - C – Contributor
  - B – Below Contributor
  - L – Employee on Leave or Otherwise Not Rated

During the annual performance rating cycle, Agency HR will now upload all ratings for their employees (X-Extraordinary, C-Contributor, B-Below Contributor, L-Employee on Leave or Not Rated).

- If rating is B – Below Contributor, enter planned re-evaluation date (no later than 90 days after evaluation)
- After re-evaluation, enter actual re-evaluation date and updated rating

For further information on, Performance Ratings see the job aids titled **HR351 Performance Rating** and **Performing a Mass Upload**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.





# Lesson Summary

9

## Managing Additional HR Data for VPA Covered Employees

In this lesson, you learned:

- How to enter and maintain Disciplinary Actions
- How to enter and maintain Performance Ratings



# Course Summary

HR351

## HCM Cardinal Employee Data Setup and Maintenance

In this course, you learned:

- The relationship between position, personal data, and job data
- How to add, clone, and maintain a position
- How to hire an employee online
- How to enter job data updates
- How to enter additional pay information
- How to enter and maintain Rewards and Recognition
- How to access the HCM Human Resources Reports Catalog
- How to run Reports
- How to run a Query
- How to enter and maintain Disciplinary Actions
- How to enter and maintain Performance Ratings





# Appendix

- Mass Data Uploads
- How to Open a Cardinal Help Desk Ticket



# Mass HR Data Uploads

Agencies load large volumes of data into Cardinal using Excel-based mass upload tool.

Agencies are responsible for populating the excel based mass upload tools, but they do not perform the upload into Cardinal in some cases.

The following list identifies entities responsible for running mass upload processes in Cardinal.

	<b>Mass Upload Data Types</b>	<b>Loaded by Agency</b>	<b>Loaded by SPO</b>	<b>Loaded by PPS</b>
	Position Data			X
	Position Default Funding	X		
	Job Data			X
	New Hires			X
	Performance Ratings	X		
	Rewards and Recognition	X		
	Leave Balance Adjustments	X		
	Additional Pay	X		
	General Deductions		X	



# Opening a Cardinal Help Desk Ticket

The Cardinal Post Production Support (PPS) team is always available to help if you encounter an issue that cannot be resolved at your agency/locality or by using training materials.

When opening a Cardinal Help Desk ticket through the VCCC ([VCCC@vita.virginia.gov](mailto:VCCC@vita.virginia.gov)) , here are some tips that will help resolve your issue faster:

- Use “CARDINAL” in the subject line.
- Be sure to include your contact information including an email address and phone number at which you can be reached.
- Details, details, details! Information such as the module you’re using (HR, Payroll, Benefits, etc.), the screen/tab you are looking at, the actions you are attempting to perform, and screen shots of error messages are all important.
- Sending screenshots? Attaching screenshots is a great way for the PPS team to see what is happening. However, DO NOT include the employee’s personal information on those screenshots. Make sure sensitive data not relevant to the issue is blurred out or cropped out.
- DO NOT send “encrypted” emails (i.e., Virtu) to VCCC ([VCCC@vita.virginia.gov](mailto:VCCC@vita.virginia.gov)) for ticket creation. You should not include protected personal information (SSN, Birthdate, address) when you submit a ticket. When this type of information is required in order for the issue to be resolved, please send a separate email to the respective Cardinal PPS Team email account using Virtu so that the PPS Team member who works on the issue can open the protected email.