HR351
Cardinal Employee Data Setup and Maintenance

Instructor Led Training

7/15/2021

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 HCM training materials are located on the Cardinal website (www.CardinalLearning@doa.virginia.gov) under Learning:

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

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

This course and all other Cardinal HCM training courses are available on the Cardinal Training Management System.

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, create, and maintain a position
- Hire an employee online (Personal and Job Data)
- Hire an employee using mass uploads
- Enter job data updates
- Enter additional pay information

Course Objectives

After completing this course, you will be able to:

- Explain the steps performed by the HR Administrator to manage benefits
- Complete a mass Job Update change transaction
- Explain how to read the upload error report

Agenda

1. Overview of Cardinal HCM
2. Key HCM Concepts
3. Setup and Maintain Employee HR Data
4. Maintain Employee Pay
5. Administer Salary Plans (Alternate Salary Plans)
6. Maintain Additional HR Data

Lesson

1 Overview of Cardinal HCM

This lesson covers the following topics:

- Cardinal HCM data supports the administration of:
  - Human Resource (HR)
  - Benefits (BN)
  - Time & Attendance (TA)
  - Payroll (PY)

Cardinal HCM Human Resources

The Human Resources (HR) functional area contains all employee HR data related to the employee lifecycle. The business processes and sub-processes that make up the core HR functionality enable agencies to add and update:

- Position data (e.g., job code, department, location)
- Employee personal data (e.g., name, address)
- Employee job data (e.g., salary, hourly rate, pay group)

HR data maintained in the Human Resources functional area feeds into and supports all of the other HCM functional areas.

Cardinal HCM allows for the interfacing of HR data (e.g., personal, position, employee job data) from agency systems to Cardinal HCM.

The personal data record for an employee working in multiple agencies is shared by the applicable agencies.

Cardinal HCM Human Resources (continued)

The following HR business processes and sub-processes are part of Cardinal HCM:

- Set Up and Maintain Employee HR Data
  - Create and Maintain Position
  - Hire/Rehire Employee
  - Maintain Employee Data
  - Transfer Employee
  - Enter and Maintain Leave Status
  - Separate Employee
  - Mass HR Data Maintenance
  - Update Employee Compensation

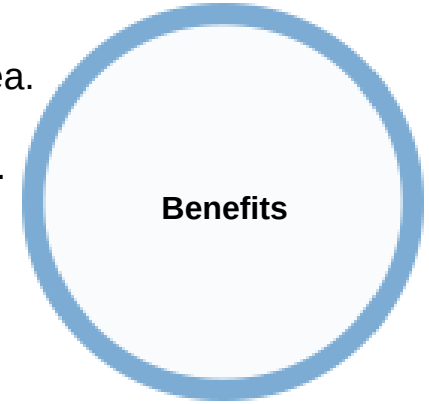
- Administer Salary Plans
  - Administer Salary Plans

- Maintain Additional HR Data
  - Enter and Maintain Disciplinary Actions
  - Enter and Maintain Performance Ratings
  - Enter and Maintain Rewards and Recognition

All of this data is utilized by other functional areas in Cardinal HCM and Cardinal Financials.

Cardinal HCM Benefits

The Benefits Administration (BN) functional area includes all of the processes required to maintain health benefits for the employees of the organization and their dependents. Benefits data maintained in the Benefits functional area feeds into the Payroll functional area.



The Employee Job records from HR are required for employees covered by health benefits.

COBRA letter processing, as well as COBRA enrollment, are administered centrally by the Office of Health Benefits (OHB) triggered by data entered on the Employee Job Record.

The following BN business processes and sub-processes are part of Cardinal HCM:

- Administer Event Maintenance
  - Maintain Enrollments
    - System Generated
    - Forms Life Events
    - Qualified Medical Support Court Orders (QMSCO)
    - Retirement
    - Deferred Compensation
    - Annuity
- Administer Open Enrollment
  - Administer Open Enrollment
- Administer COBRA
- Benefits Reconciliation
  - Healthcare Reconciliation
  - VRS Retirement Reconciliation
- ACA Reporting

Cardinal HCM Time and Attendance

The Time & Attendance (TA) functional area contains two modules: Time and Labor (TL) and Absence Management (AM). TA handles time and leave entry, as well as provides leave balances. The Time and Attendance functional area is used to record productive and non-productive time which drives pay for employees. Time entered feeds into the Payroll functional area.

Employee Job records from HR are required for employees who use TA to track time worked and leave.

The following TA business process and sub-processes are part of Cardinal HCM:

- TA Employee Setup
  - Enroll and Maintain Time Reporters and Comp Plan Enrollment
  - Create and Maintain Schedules

- TA Capture
  - Manage Time Entry
  - Manage Absence Reporting

- TA Approval and Processing
  - Administer Time and Processing
  - Administer Absence Processing
  - Administer Delegation

- Payroll Integration and Cost Allocation
  - Integration between Cardinal Time and Attendance and Payroll
  - Cost Allocation of Time after Payroll

Cardinal HCM Payroll

Payroll (PY) is the functional area that enables the calculation of earnings, taxes, and deductions. The Payroll functional area is used to ensure that all employees are paid accurately and on time. Employee Job records from HR are required for employees who will be paid out of Cardinal.

The following PY business processes and sub-processes are part of Cardinal HCM:

- Maintain Employee Payroll Data
  - Additional Pay
  - Employee Deductions
  - Employee Direct Deposits
  - Employee Taxes
- Using Single-Use Payroll Online Tool
  - Enter Payroll Adjustments
  - Approve Transactions
- Process Payroll
  - Create Paysheets
  - Calculate Pay
  - Confirm Payroll
- Off-cycle Processing
- Post Payroll
  - Process Pay Period Tax Payments
  - Process Pay Period Non-Tax Payments
- Payroll Costing
  - General Ledger Integration
  - Accounts Payable Integration
- Periodic Regulatory Reporting
  - Audit and Adjust Employee Balances
  - Prepare and File Regulatory Reports
  - Calendar Year End

Cardinal HCM Modules

The functional areas work together to generate an employee's paycheck.

Human Resources (HR)

- Position
- Person
- Job

Benefits (BN)

- Medical
- Life Insurance
- Retirement
- FSA
- TPA (TIAA, FBMC, ICMA-RC)

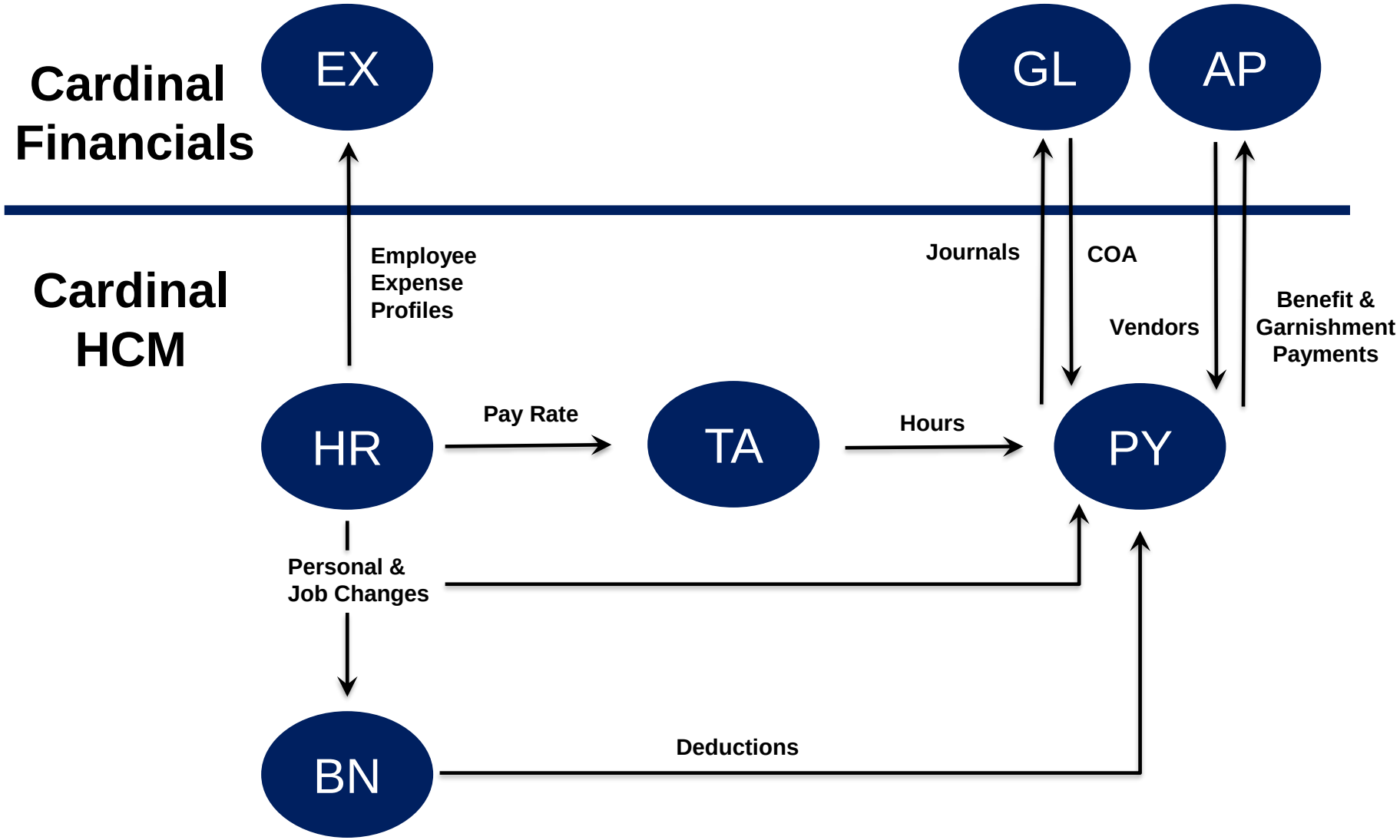
Time & Attendance (TA)

- Time
- Absences
- Approval

Payroll (PY)

- Earnings
- Deductions
- Taxes
- Review Paychecks

Cardinal HCM Interfacing to Cardinal Financials



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

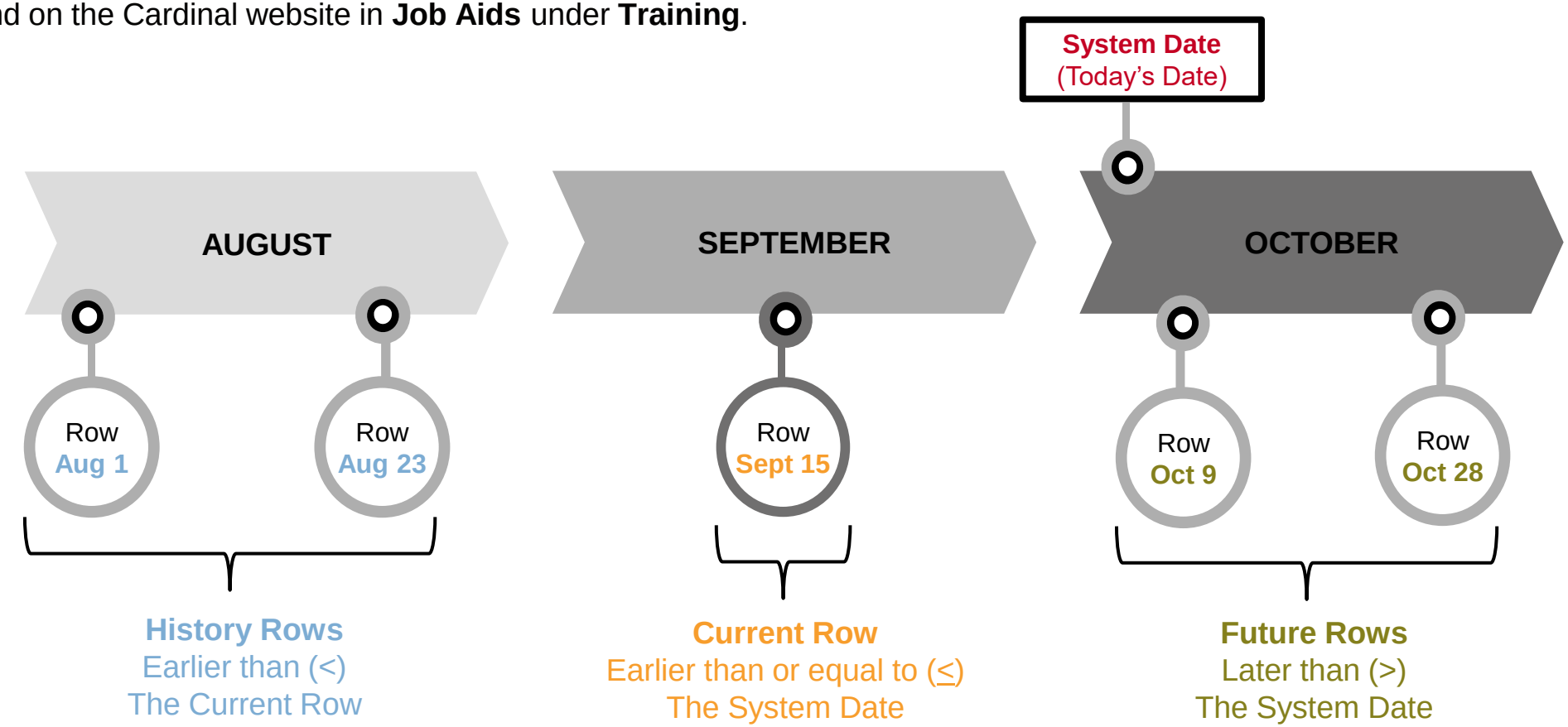
HCM: Human Resources (HR), Benefits Administration (BN), Time & Attendance (TA), Payroll (PY)

Cardinal Effective Dating

When entering new information related to existing data, such as a leave of absence, retaining the data already in the database is imperative. To retain history, insert a data row identified by a date that indicates when the new information goes into effect: an effective date.

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.

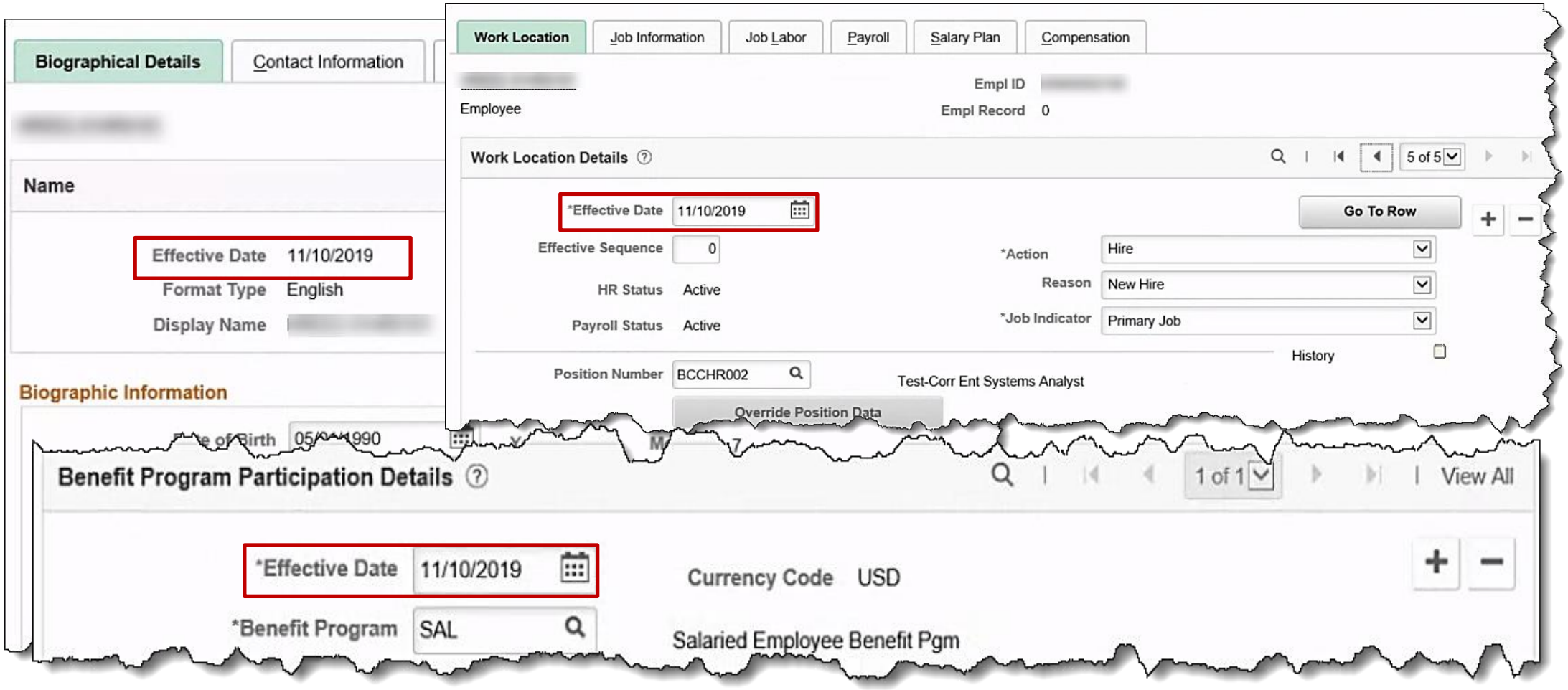
For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.



Cardinal Effective Dating (continued)

The Personal Record and Job Record Effective Dating impact each other and other functional areas.

The Effective Date of the hire on the Job Record cannot be prior to the Effective Date on the Personal Data Hire Record.



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. The effective date does not impact anything in the system.
   True or False.

2. When completing a hire, the **Personal Data** page must be effective dated:
   A. Prior to the effective date of the Job Record
   B. Equal to the effective date of the Job Record
   C. Less than or equal to the effective date of the Job Record

3. When creating a new Position, there is no consideration given to the effective date used.
   True or False.

Lesson Summary

1 Overview of Cardinal HCM

In this lesson, you learned:

- Cardinal HCM data supports the administration of:
  - Human Resources (HR)
  - Benefits (BN)
  - Time & Attendance (TA)
  - Payroll (PY)
- All records in Cardinal HCM are effective dated and the importance of effective dates
- Cardinal is a web-based Financial and Human Capital Management System

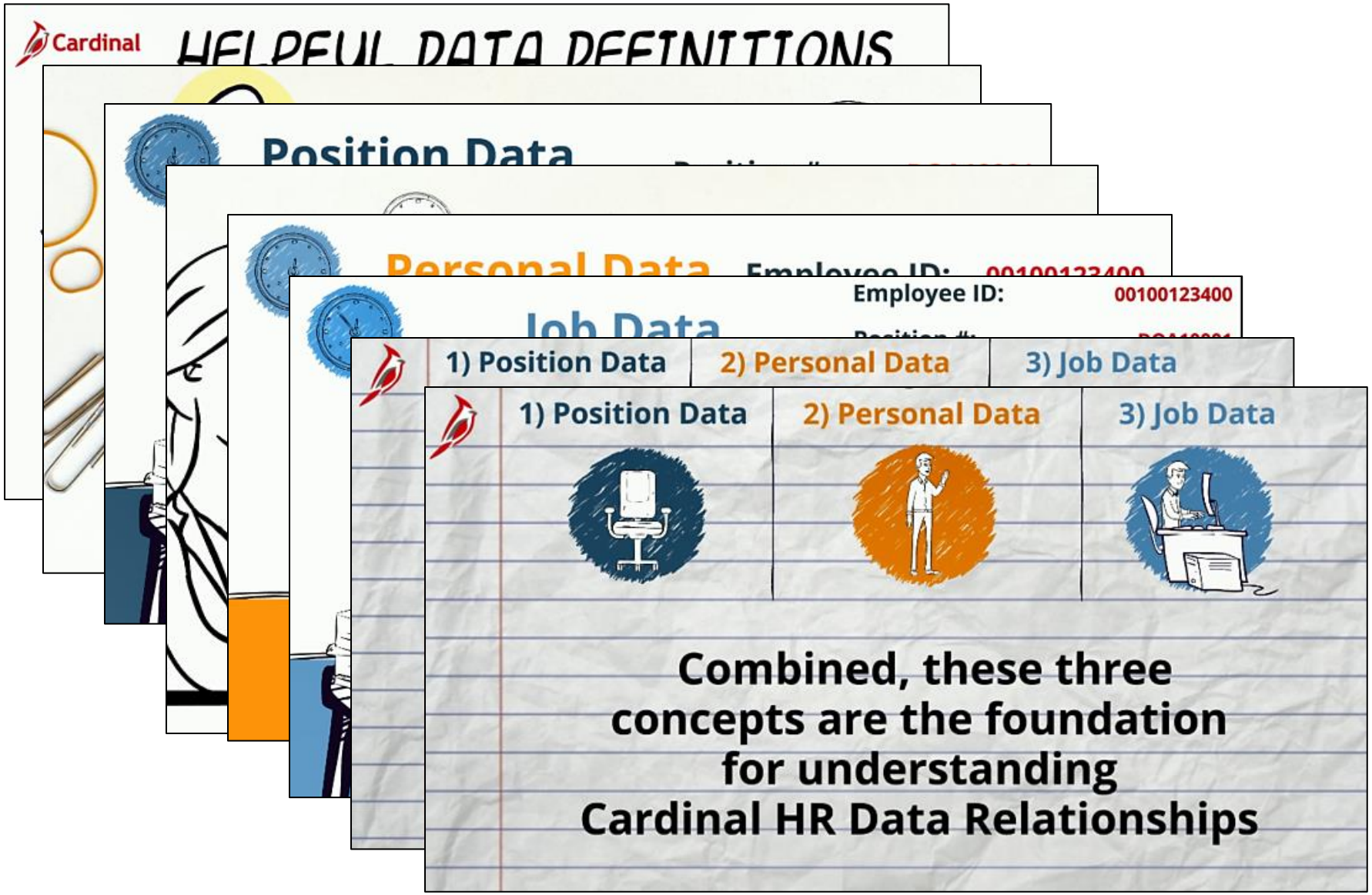
Lesson

2 Key HCM Concepts

This lesson covers the following topics:

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

HR Data Relationships Review



HCM Key Concept

1 POSITION DATA*

Position: DOA10001
Pos Descr: Sr Account Analyst
Business Unit: 15100
Reports To: DOA10003

Position: DOA10002
Pos Descr: Sr Account Analyst
Business Unit: 15100
Reports To: DOA10003

Position: ABC10012
Pos Descr: Store Clerk
Business Unit: 99900
Reports To: ABC10123

3 JOB DATA*

Empl ID: 00100123400
Empl Rcd: 0
Position: DOA10001
Business Unit**: 15100
Benefit Program: SAL
Reports To**: DOA10003
Pay Rate: 40,200.00/yr

Empl ID: 00100123600
Empl Rcd: 0
Position: DOA10002
Business Unit**: 15100
Benefit Program: SAL
Reports To**: DOA10003
Pay Rate: 38,200.00/yr

Empl ID: 00100123600
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
Name: Jane Doe
Address: 123 Main Street, Richmond, VA 23222
SSN: 123-45-6789

Empl ID: 00100123600
Name: Mark Thomas
Address: 123 Valley Dr, Richmond VA 23222
SSN: 345-67-8999

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

Lesson Summary

2 Key HCM Concepts

In this lesson, you learned:

- Position and job share a one-to-one relationship (for most agencies)
- The position is created and associated with a job before an employee is linked to the position
- Position numbers are unique IDs
- Different position data is required based on agency HR level
- Employee personal data is required to save the new hire record
- Employee data is changed on the job record, not on the position
- Core employee data entered on the personal and job data pages is used by other HCM functional areas

Lesson

3 Setup and Maintain Employee HR Data

This lesson covers the following topics:

- Creating and Maintaining Position Data
- Hiring or Rehiring an Employee
- Maintaining Employee Data (ESS)
- Intra-Agency Transfer
- Inter-Agency Transfer
- Maintain Leave Status
- Separate Employee
- Mass HR Data Maintenance

Creating and Maintaining Position Data

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

Agencies continue to utilize agency-specific systems or paper forms to capture position information and route for approvals (e.g., agency budget, HR approvals) within the Agency.

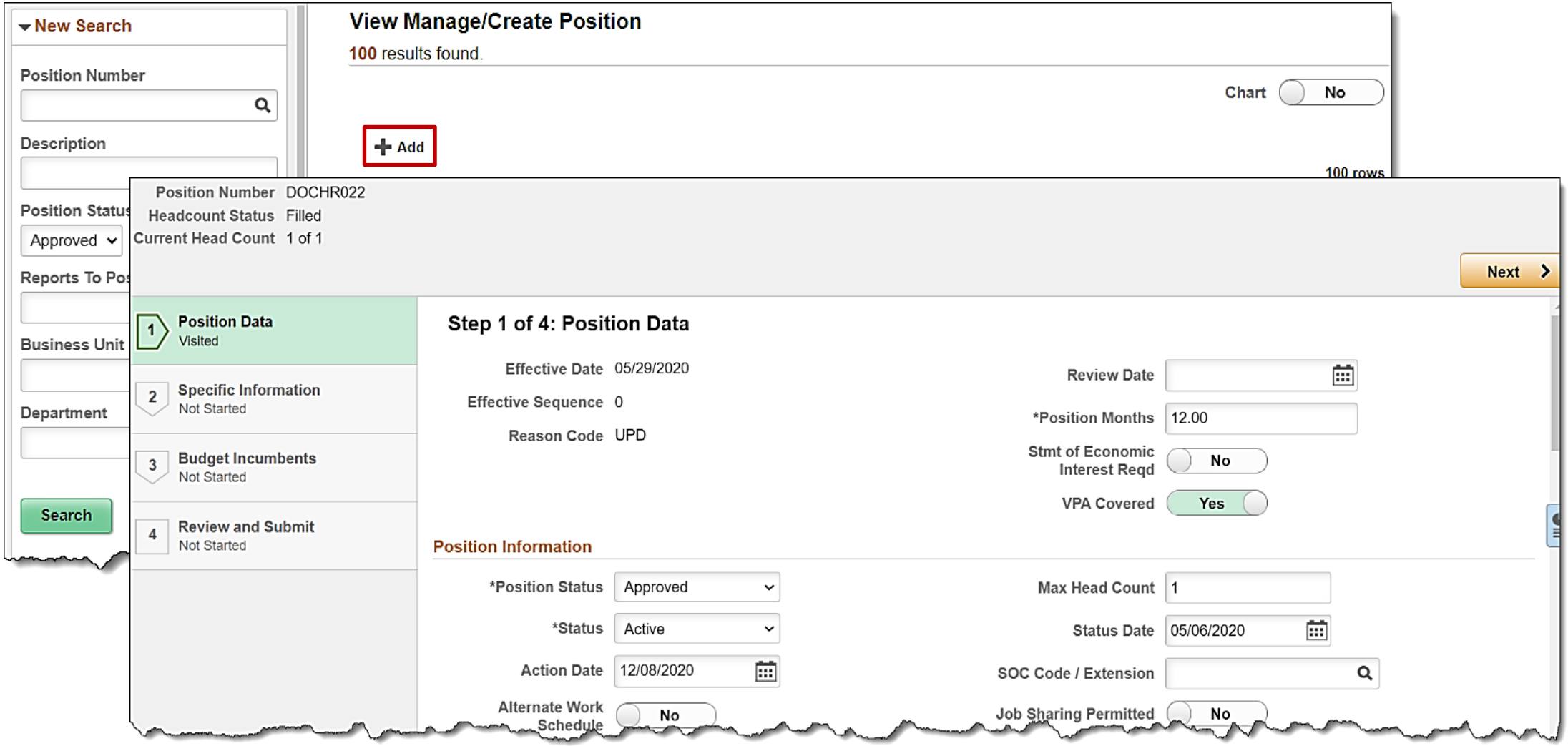
Position Status defaults to “Approved”. Frozen status does not remove position from EPR report.
Status Inactive removes position from EPR Report.

Positions:
- Required and tracked (vacant or filled)
- Created for all employees
- Created before employee is hired
- Changed at position level then conveyed to Employee Job Record

Position IDs :
- Unique for each agency and begin with three-character alpha prefix that represents Agency (the alpha prefix is Company)
- Parent Agencies can enter positions for child Agencies
- Each agency must develop a process to track the sequential Position IDs

For further information on Creating/Cloning 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**.

Creating and Maintaining Position Data (continued)

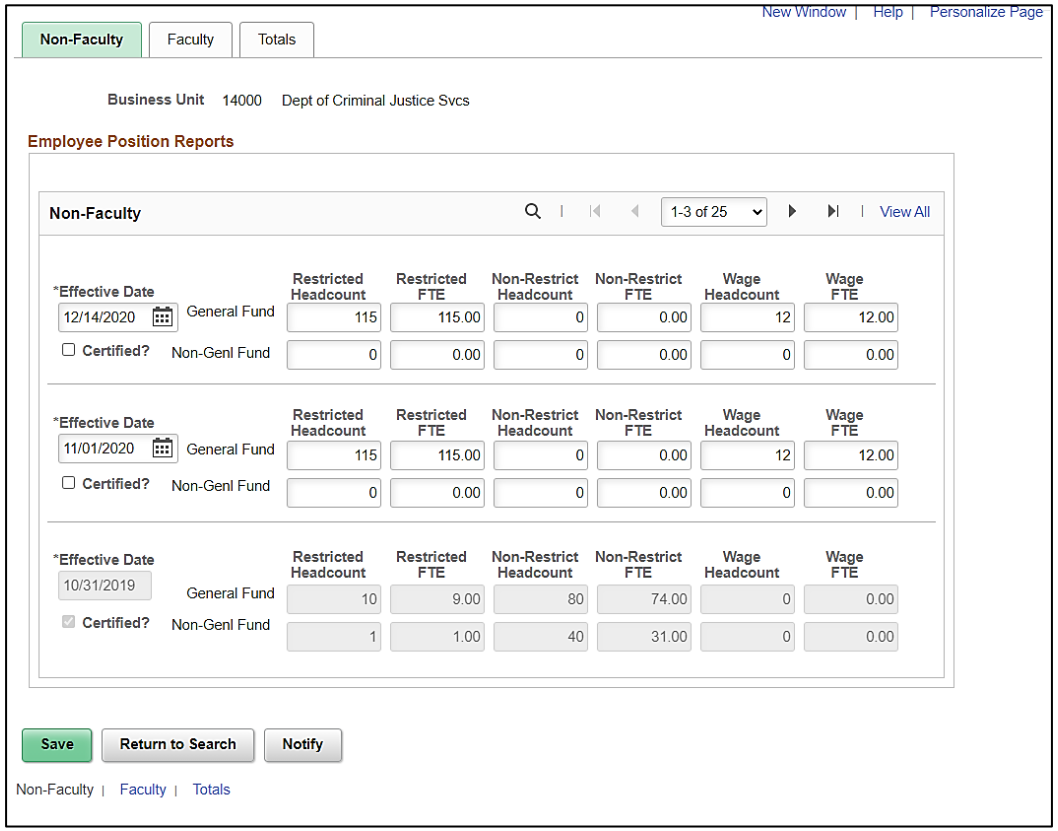


Navigation: Navigator > Organizational Development > Position Management > Maintain Position Budgets > Manage Position

Creating and Maintaining Position Data (continued)

Updating Employee and Position Counts

- Cardinal's custom Employee Position Reporting (EPR) tool resembles current DHRM EPR
  - Generates required data to legislatively mandated reports
  - Automatic batch process runs at end of month to enable Agency HR Teams to use EPR Tool
  - HR Administrators and HR EPR Only Users use to update and certify filled Position counts correctly reflected

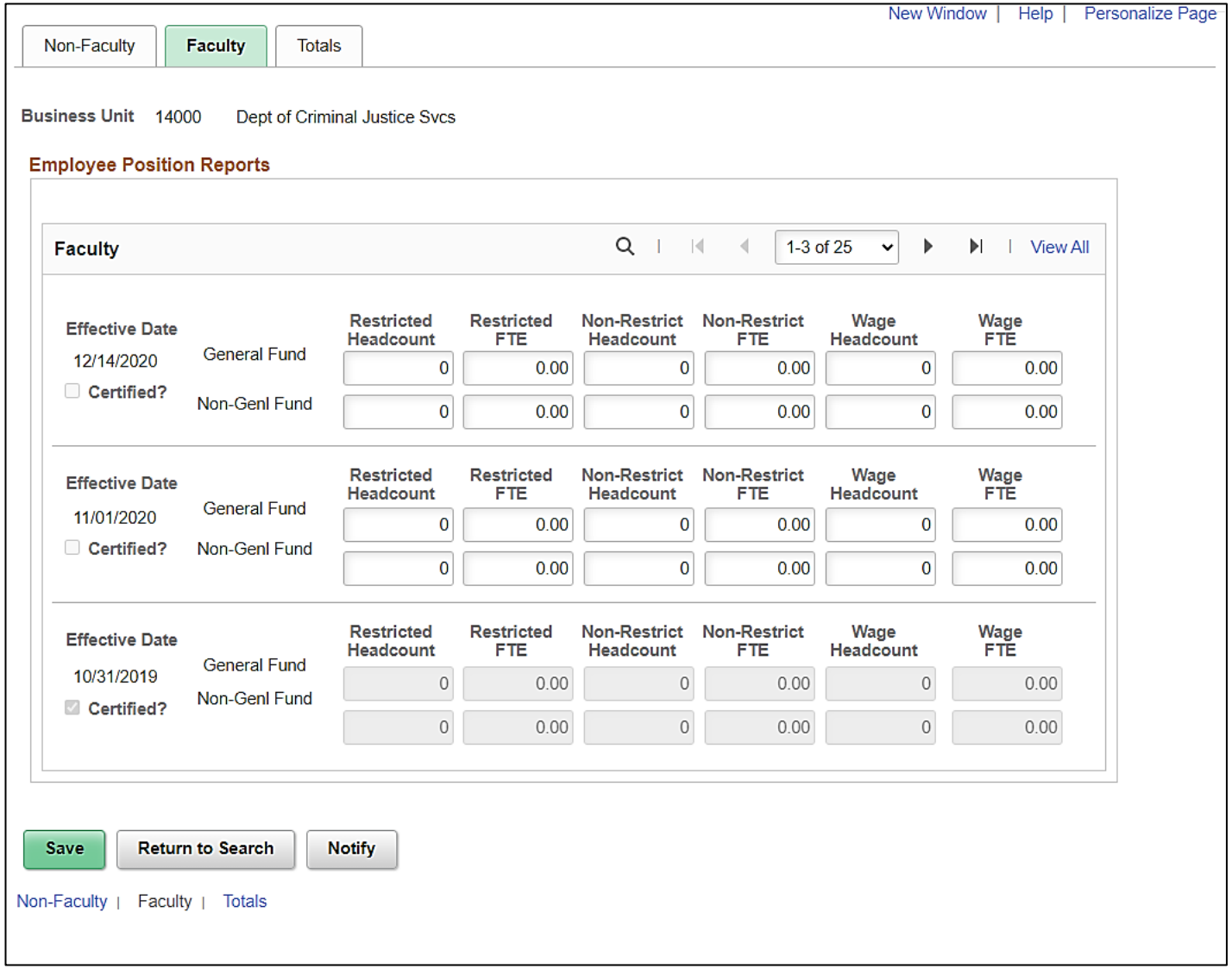


Note: For Release 1, Agencies enter and certify EPR data in both Cardinal and HuRMan systems

<u>Navigation</u>: Navigator > Workforce Administration > EPR Tool

Creating and Maintaining Position Data (continued)

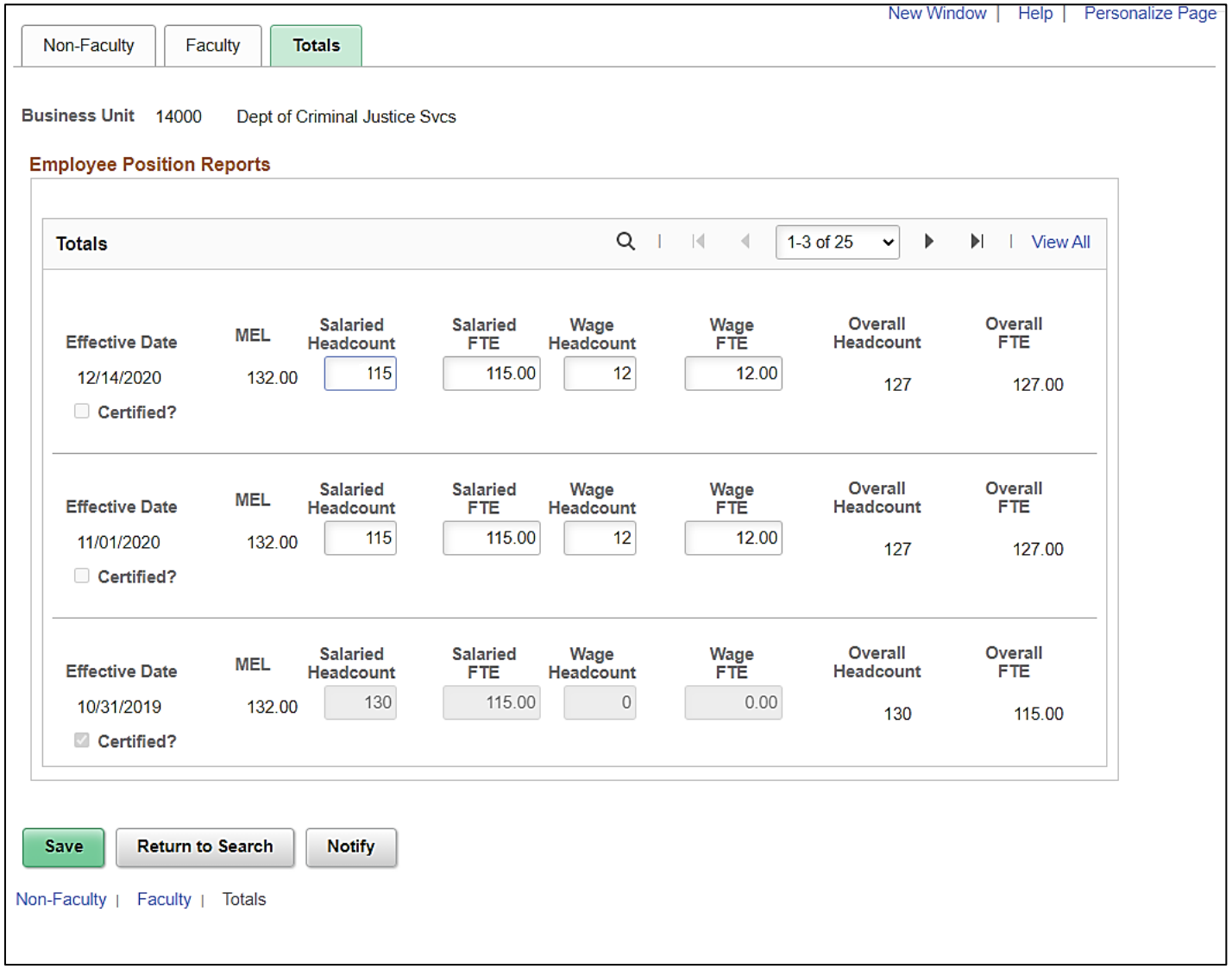
Faculty tab



<u>Navigation</u>: Navigator > Workforce Administration > EPR Tool

Creating and Maintaining Position Data (continued)

Totals tab



<u>Navigation</u>: Navigator > Workforce Administration > EPR Tool

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Agency HR will have the ability to:
   a) Add, Clone, Update Positions
   b) Clone Positions only
   c) Delete Positions

2. What value is not required to save the personal data record?
   a) Name
   b) Gender
   c) Birth date

3. The Job Record does not require an effective date.
   True or False.

DEMO

Hands-On Exercise

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

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

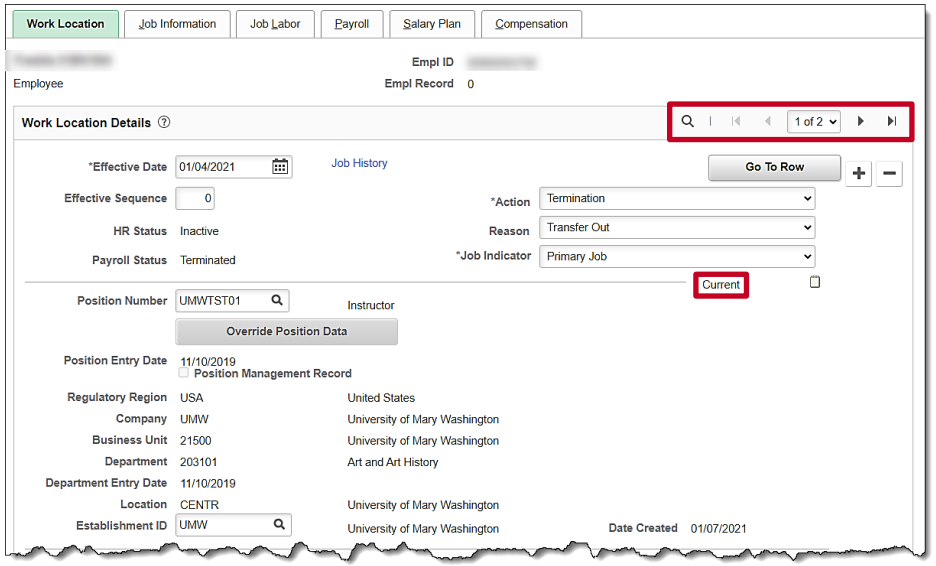
If you have any questions, please ask your instructor.

Hiring or Rehiring an Employee

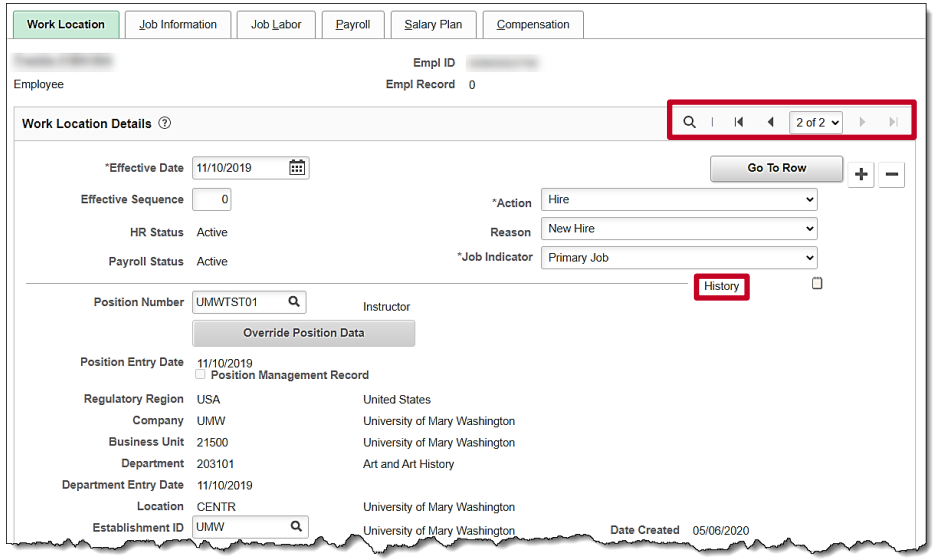
Key Points about the Hire/Rehire business process include:

- Applies to both salaried and wage employees
- Also used when transferring an employee from one agency to another
- Link the employee to New Hire Checklist to guide them through the COVA New Hire tasks.
- Job activity and changes viewed on **Job Data** page
  - Stores all current and historical job data related to employee
  - Use Effective Sequencing if multiple transactions with same effective date

Current Row



Future Row



For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning.**

Hiring or Rehiring an Employee (continued)

Personal Data Information

If a new hire does not have a SSN, (e.g., Foreign Nationals), the employee must submit an SS-5 Application for a Social Security card to the Social Security Administration. A temporary number is assigned until the permanent number is received. The “Employee Temporary Number Request” form must be completed and submitted to DHRM. This process is the same as it happens today.

A query has been created to monitor temporary SSNs (these SSNs start with 907) that exist in the Cardinal system (V_HR_Monitor Temporary SSNs). For further information on Monitoring Temporary SSN, see the **HR351 Monitoring Temporary SSN**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Prior to completing the new hire or rehire, the Agency HR does an Employee Search Match in Cardinal to find out if the person already exists in the Cardinal system.

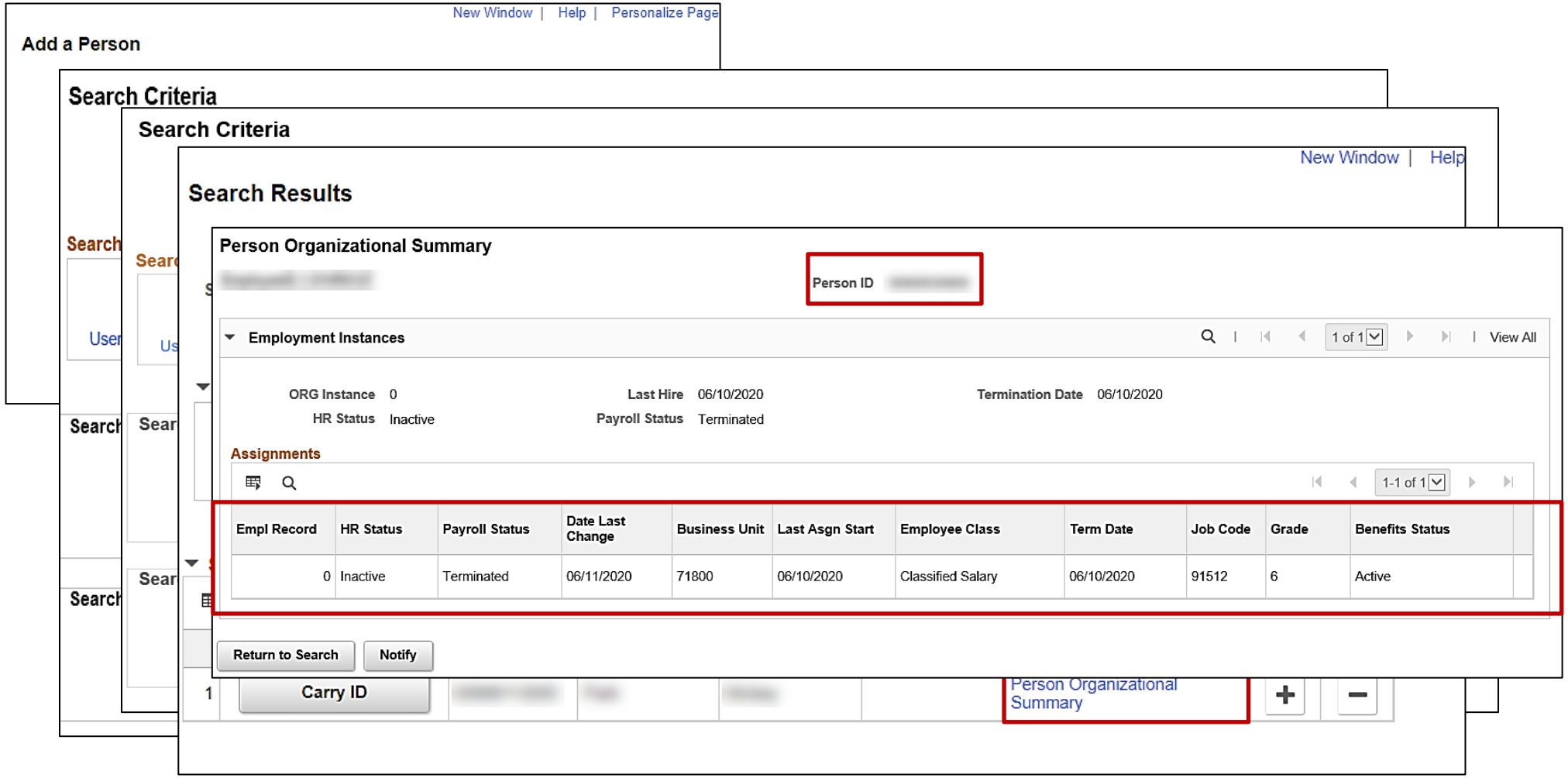
- If a match is not found, a new employee ID will be assigned by PMIS. For more information see the **Release 1 Assigning Empl ID** Job Aid found on the Cardinal website in **Job Aids** under **Learning.**
- If a match is found (SSN and Name in system must match new entry), the Agency HR updates the applicable employee job data record.

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 this employee ID number as part of the upload step. This process to complete a new hire upload interface is covered later in this course.

For further information on hiring an employee, see the Job Aid titled **HR351 Completing a New Hire**. This Job Aid can be found on the Cardinal website in **Job Aid** under **Learning**.

Hiring or Rehiring an Employee (continued)

The Employee Search Match verifies if an employee currently exists in Cardinal and requires the employee's Social Security Number (National ID). The results drive the Action and Action/Reason used when completing the hire (Hire or Rehire).



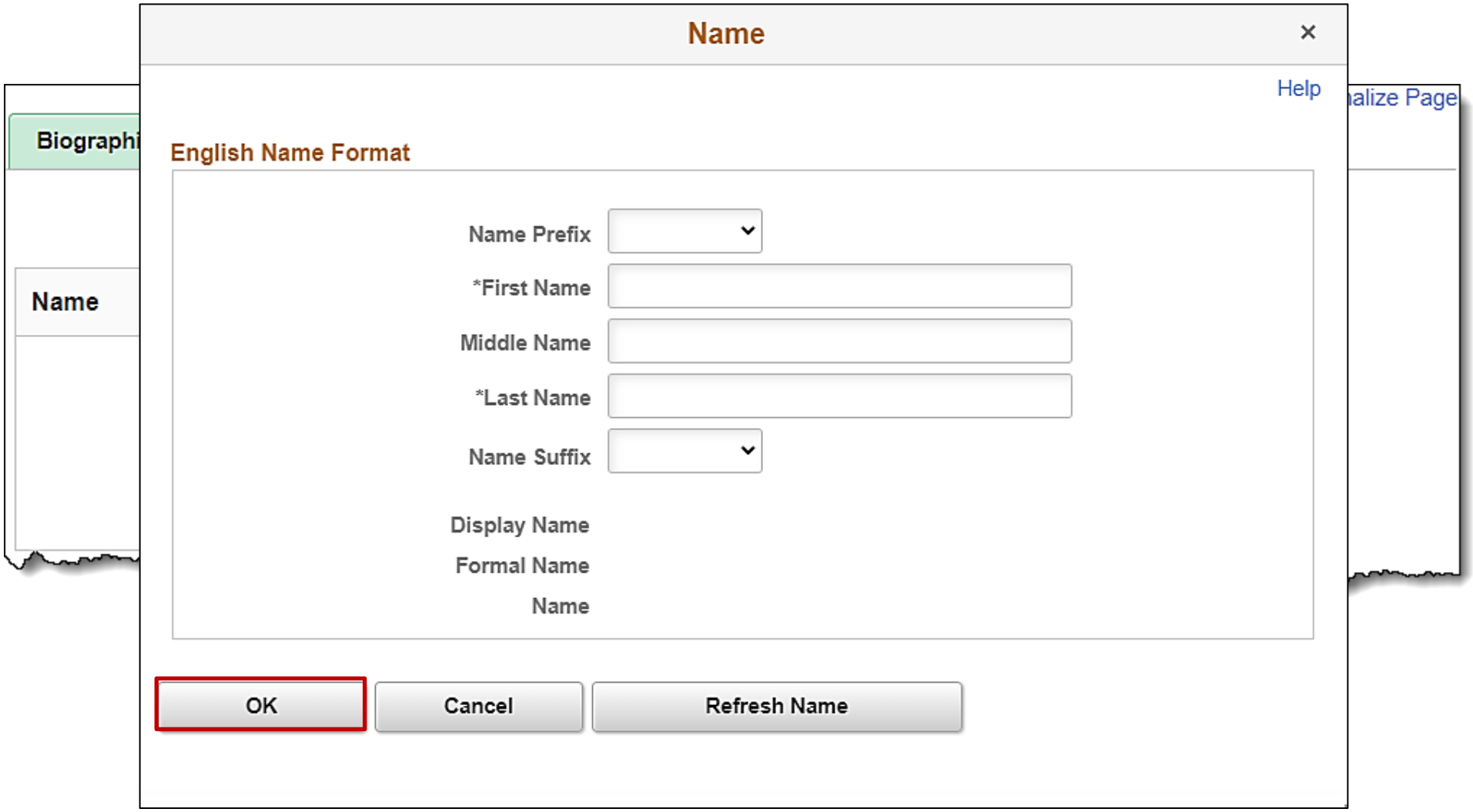
Note: For further information on Employee Search Match, refer to the Job Aid titled **HR351 Employee Search Match**. It can be found on the Cardinal website in **Job Aids** under **Learning**.

Hiring or Rehiring an Employee (continued)

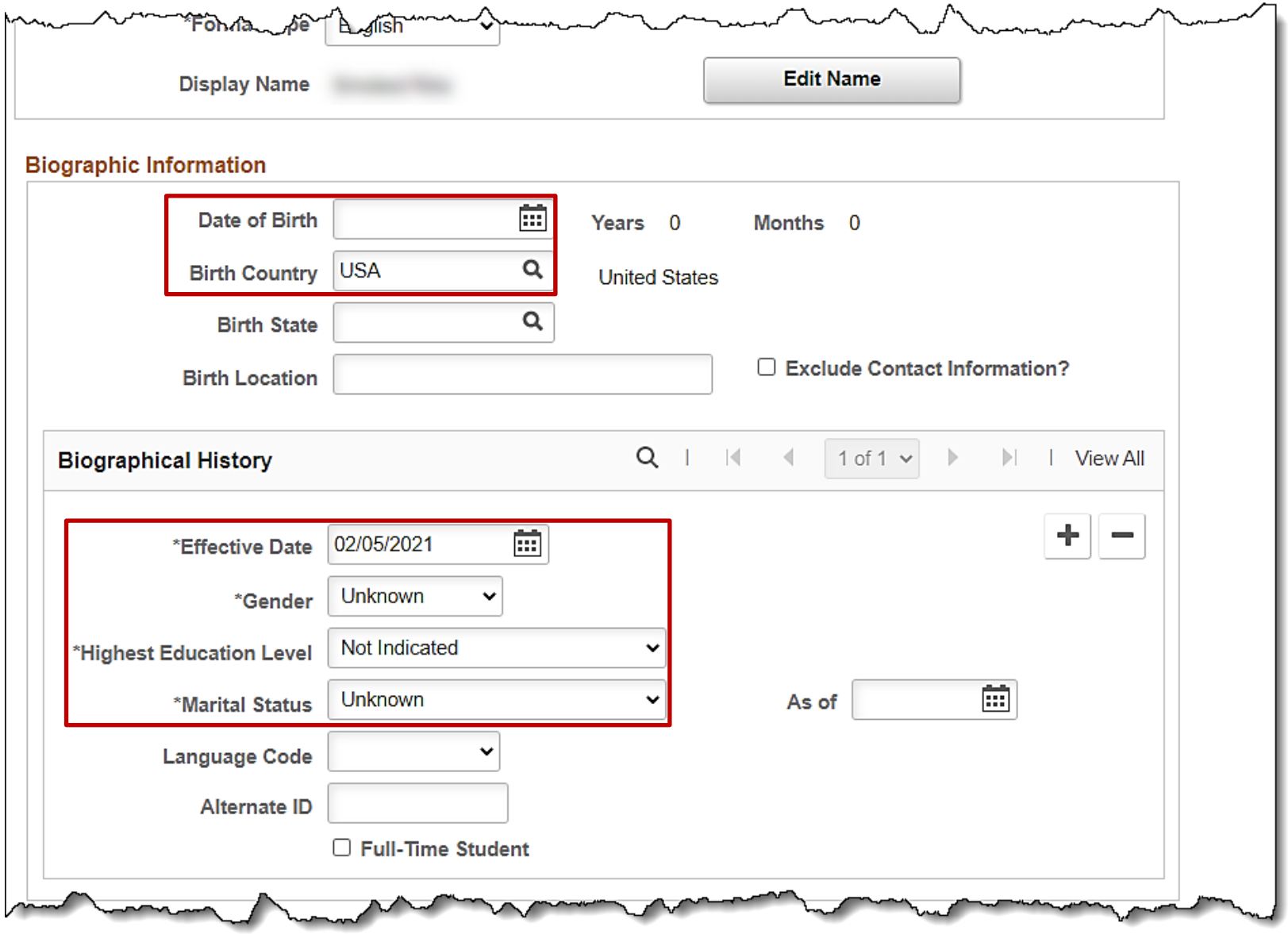
After completing the employee search match, if an employee id was not found go to the PMIS PSE300 screen to complete the new hire and receive an employee id number. Make a note of the PMIS Employee ID number and complete the new hire the next day.

Note: This process is for Release 1 Agencies **ONLY.** Once Release 2 is rolled out, Cardinal will assign all Empl IDs automatically.

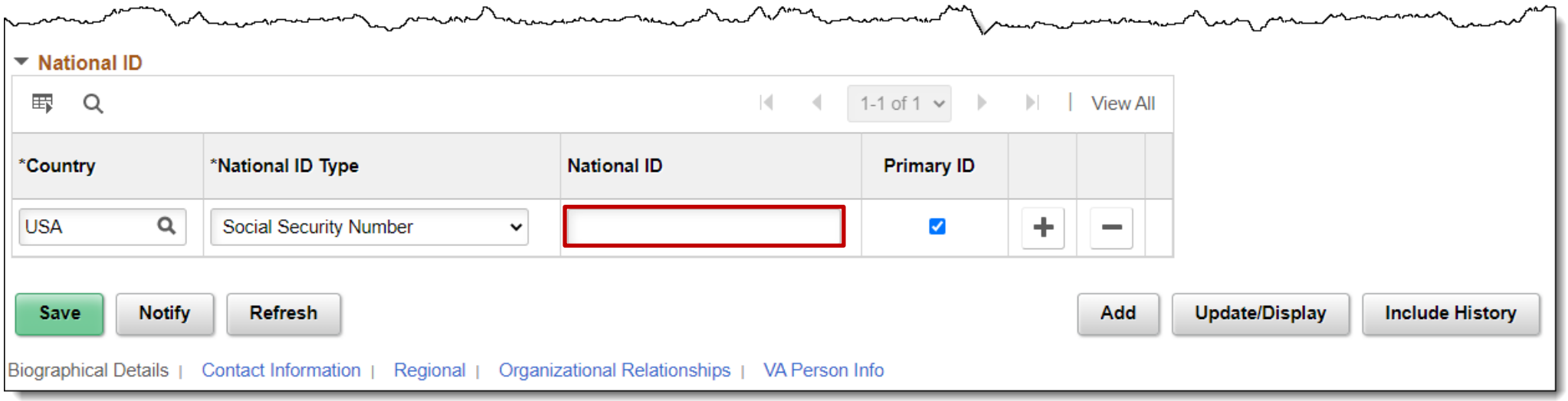
Hiring or Rehiring an Employee (continued)



Hiring or Rehiring an Employee (continued)

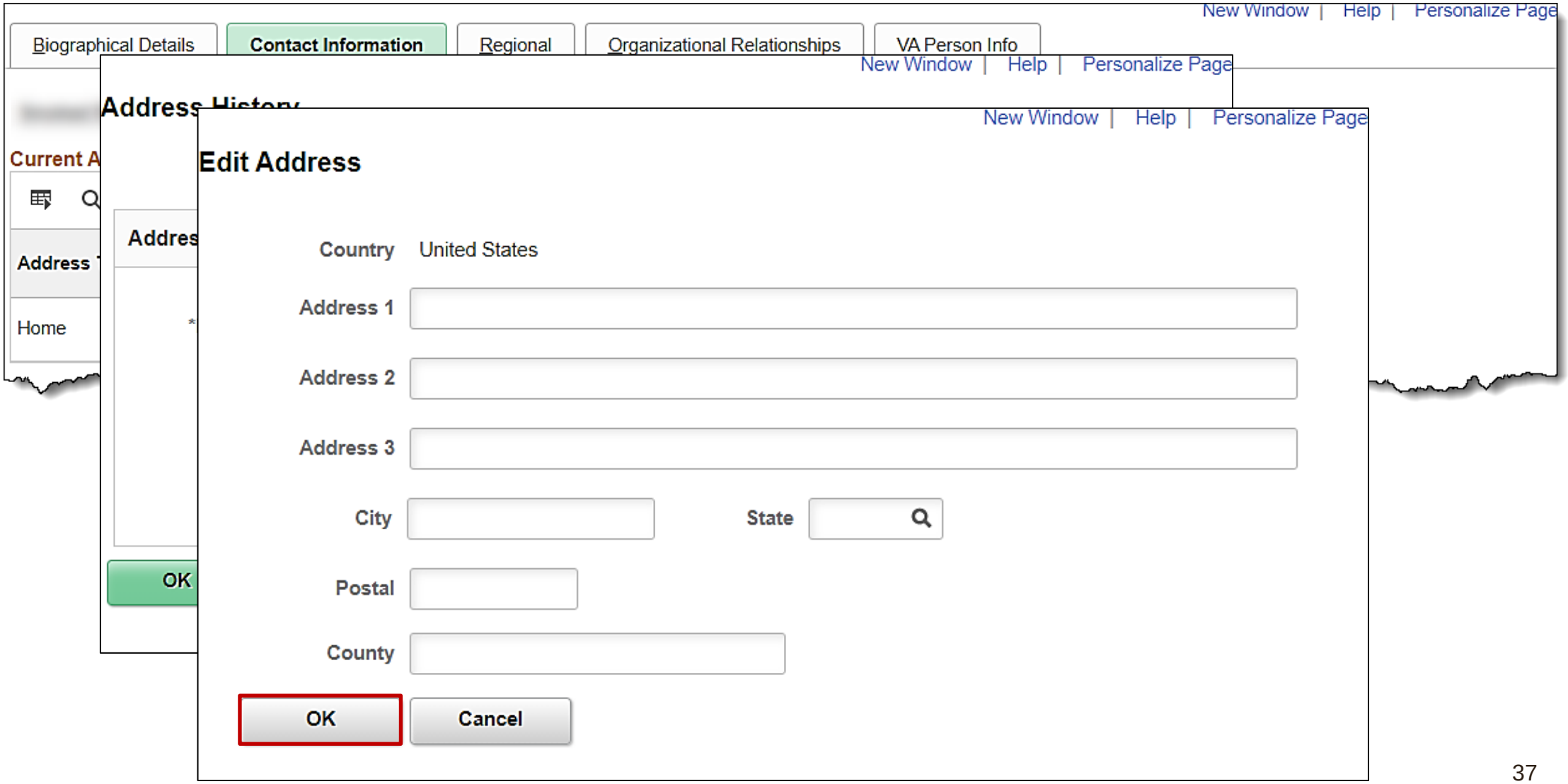


Hiring or Rehiring an Employee (continued)



Note: The **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. For further information on Monitoring Temporary SSN, see the **HR351 Monitoring Temporary SSN**. This Job Aid can be found on the Cardinal website in **Job Aid** under **Learning**.

Hiring or Rehiring an Employee (continued)



Note: The state selected as part of the address has a direct impact on benefit options and payroll taxes.

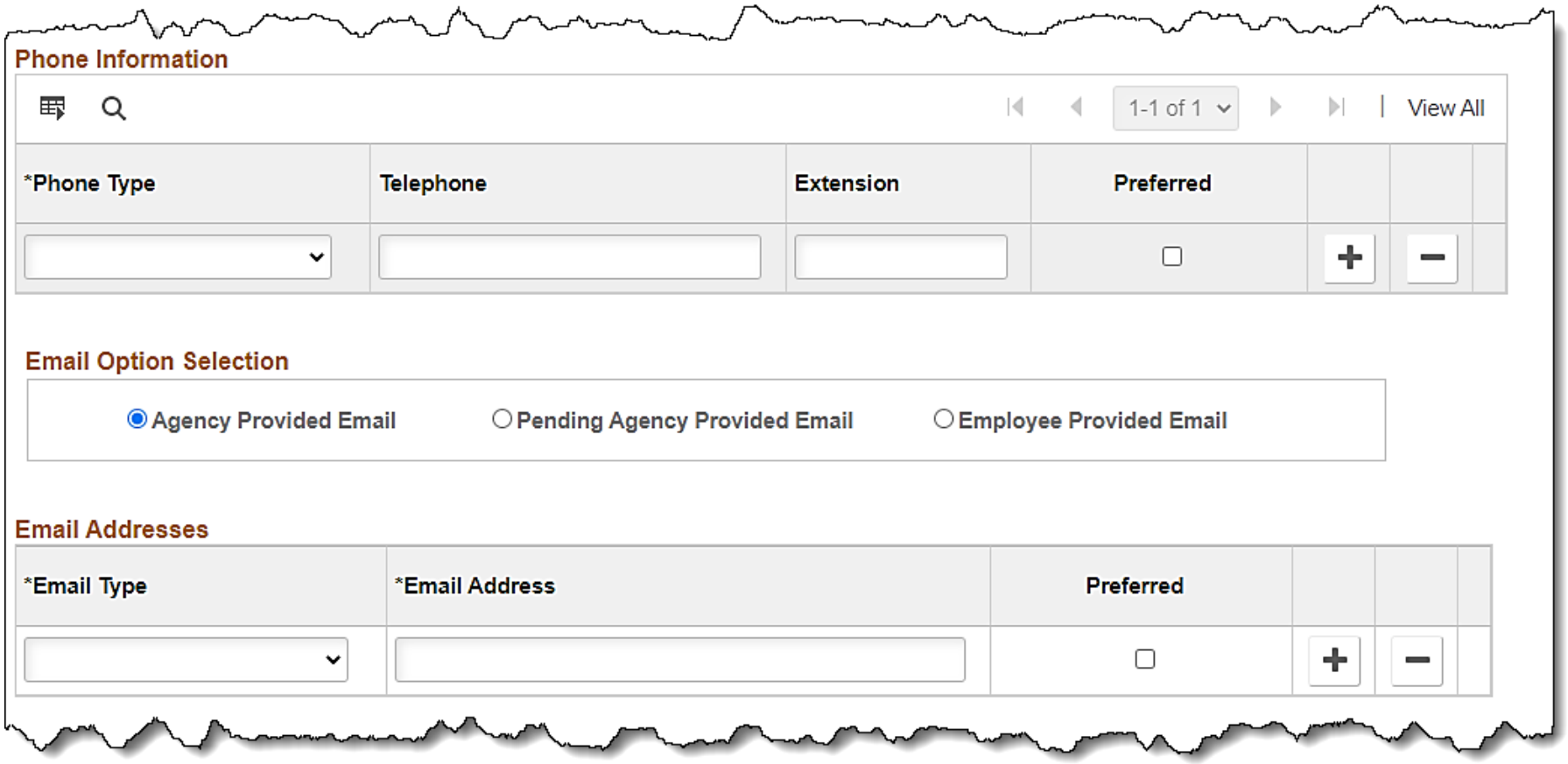
Hiring or Rehiring an Employee (continued)

The **Phone Information** section is required but does not have to be accurate/unique.

- Obtain and enter employee's accurate Phone Type and Telephone Number if possible

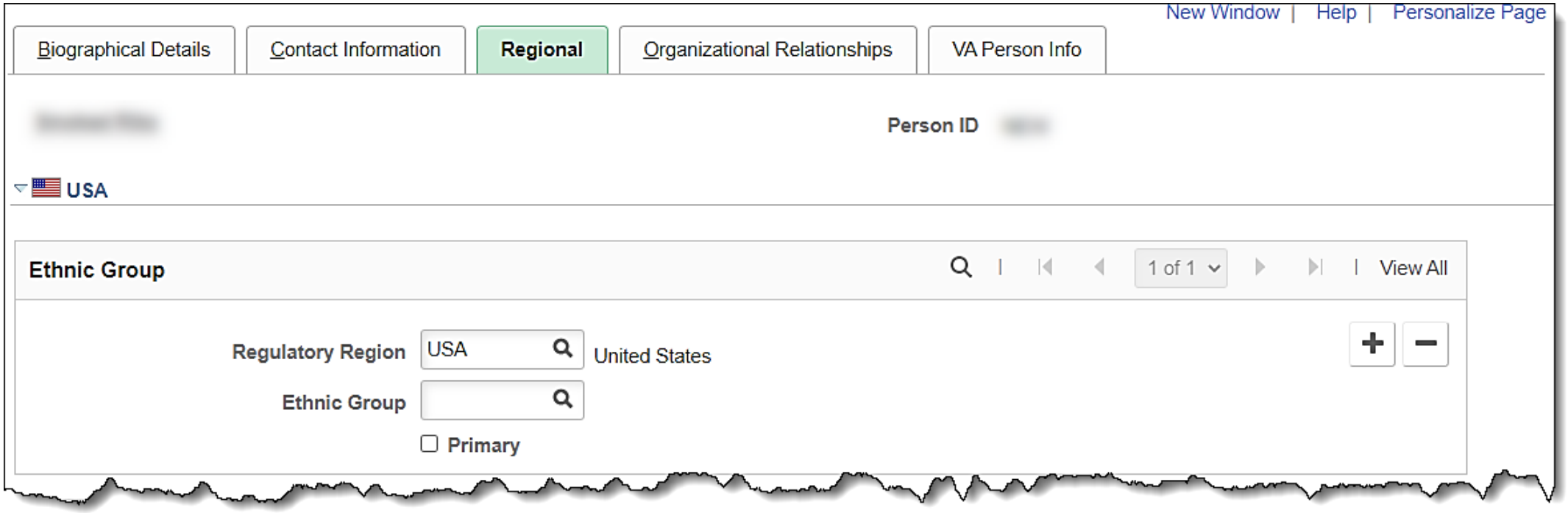
The Virginia Information Technologies Agency's (VITA) cloud-based Identify Access Management tool (Okta) authenticates agency users and requires valid email address.

- Preferred email address required to ensure all employees (active and inactive) have consistent access



Hiring or Rehiring an Employee (continued)

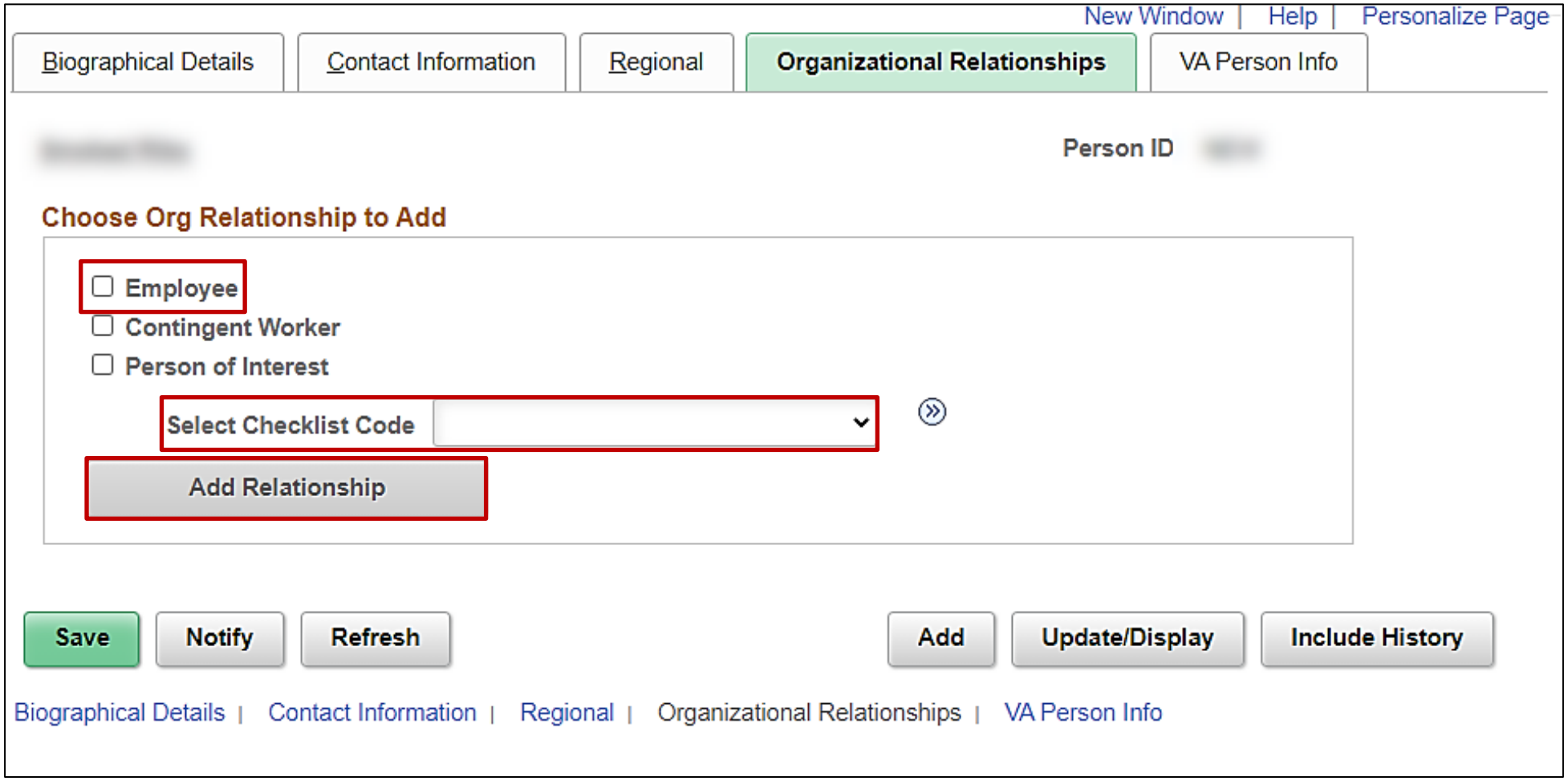
Employees can identify as multiple ethnic groups, which helps drive multiple reports and initiatives.



Hiring or Rehiring an Employee (continued)

To add an Employee Relationship:

1. Select the **Employee** checkbox
2. Select "**Hire**" from the **Select Checklist Code** drop-down menu
3. Click the **Add Relationship** button



Hiring or Rehiring an Employee (continued)

Key points about the Hire/Rehire business process include:

- Effective date represents hire or rehire date (can be future dated)
- Effective date must be greater than or equal to effective date of Personal Data entered
- Action/Action Reason describes hire/rehire reason
  - Action activates HR and Payroll statuses
  - Reason activates Benefits status
- Shared position data populates throughout employee's Job Record
- Enter additional fields (e.g., employee class, pay group, frequency, compensation) on **Job Data** page
- If employee has multiple jobs, they have employee ID with multiple employee records
- Interface determines correct employee record number based upon agency, position, and employee type (for interfacing agencies)

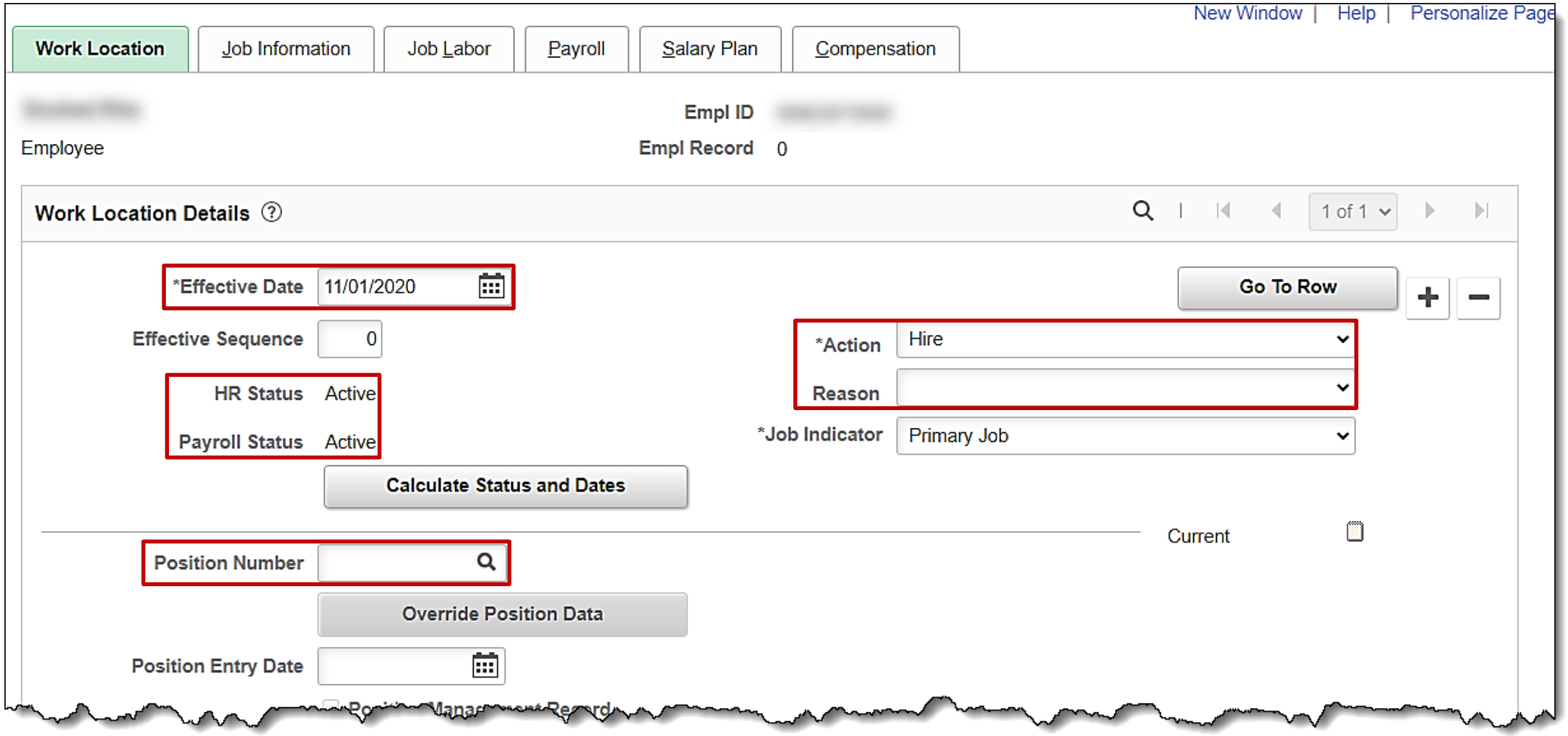
Note: The Action/Reason, Employee Class, and Job Code are key fields in the VRS file nightly extract from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if the incorrect data is entered.

For a further information on Action/Action Reason combinations and a PMIS Code Crosswalk, refer to the Job Aid titled **HR351 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on hiring an employee, see the video titled **HR351 Completing a New Hire**. This video can be found on the Cardinal website in **Videos** under **Learning**.

Hiring or Rehiring an Employee (continued)

Job Data – Work Location



For further information on Action Reasons, see the Job Aid titled **HR351 Action Reason Table**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Hiring or Rehiring an Employee (continued)

Job Data – Job Information

New Window | Help | Personalize Page

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

Employee

Empl ID

Empl Record 0

Job Information Details

1 of 1

Go To Row

Effective Date 11/01/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Current ☐

Job Code 69113 Security Officer III

Entry Date 11/01/2020

SOC Code

Supervisor Level

Supervisor Name

Reports To DOCHR001 Test-Director of Corrections

Regular/Temporary Regular

Full/Part Full-Time

Empl Class

***Officer Code** None

Regular Shift Not Applicable

Shift Rate

Classified Ind Classified

Shift Factor

Standard Hours

Standard Hours 40.00

Work Period W Weekly

FTE 1.000000

☐ **Adds to FTE Actual Count?**

☐ **Encumbrance Override**

Hiring or Rehiring an Employee (continued)

Job Data – Payroll

New Window | Help | Personalize Page

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

Employee

Empl ID

Empl Record 0

Payroll Information

1 of 1

Go To Row

Effective Date 11/01/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

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 or Rehiring an Employee (continued)

Job Data – Payroll

Current

*Payroll System: Payroll for North America

Absence System: Absence Management

Payroll for North America

Pay Group: SM1 — Semimonthly Class (SATFRI07)

Employee Type: S — Salaried

Holiday Schedule: HOLSAL — Sal.HolSch

Tax Location Code: 760 — Richmond (City)

GL Pay Type:

FICA Status: Subject

Edit ChartFields

Combination Code:

Absence Management System

Pay Group: SM1 — Semi-monthly Classified

Setting

- [x] Use Pay Group Eligibility
- [x] Use Pay Group Rate Type
- [x] Use Pay Group As Of Date

Eligibility Group:

Exchange Rate Type:

Use Rate As Of:

Hiring or Rehiring an Employee (continued)

Job Data – Salary Plan

New Window | Help | Personalize Page

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

Employee

Empl ID

Empl Record 0

Salary Plan Details

1 of 1

Go To Row

Effective Date 11/01/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Current

Salary Admin Plan SW

Grade 4

Step

Statewide

Statewide Salary Grade 4

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 or Rehiring an Employee (continued)

Job Data – Compensation

New Window | Help | Personalize Page

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

Employee

Empl ID

Empl Record 0

Compensation Details

1 of 1

Go To Row

Effective Date 11/01/2020

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Current

Compensation Rate 0.000000

*Frequency A Annual

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		0				

Calculate Compensation

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

OK | Cancel | Apply | Refresh

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

Hiring or Rehiring an Employee (continued)

Job Data – Employment Data (Waged Employee)

Wage employee – the Person Employment Dates box does not populate

New Window | Help | Personalize Page

Employment Information

Empl ID

Employee

Empl Record 0

Organizational Instance

Organizational Instance Rcd 0

Original Start Date 01/01/2019

Override

Last Start Date 01/01/2019

First Start Date 01/01/2019

Termination Date

		Years	Months	Days
Org Instance Service Date 01/01/2019	Override	2	1	17

Organizational Assignment Data

Instance Record

Last Assignment Start Date 01/01/2019

First Assignment Start 01/01/2019

Assignment End Date

Home/Host Classification Home

Time Reporter Data

		Years	Months	Days
Company Seniority Date	Override	0	0	0
Benefits Service Date 01/01/2019	Override	2	1	17
Seniority Pay Calc Date 01/01/2019	Override	2	1	17

Probation Date

Professional Experience Date

Last Verification Date

Business Title Work Order Clerk

Position Phone

*Work Mode Office/Facility Worker

Tenure Status/Contract Type

Alternate Leave Plan

Alternate Work Schedule

VSDP Effective Date 01/01/2019

Agency Use Field 1

Agency Use Field 2

Agency Use Field 3

USA

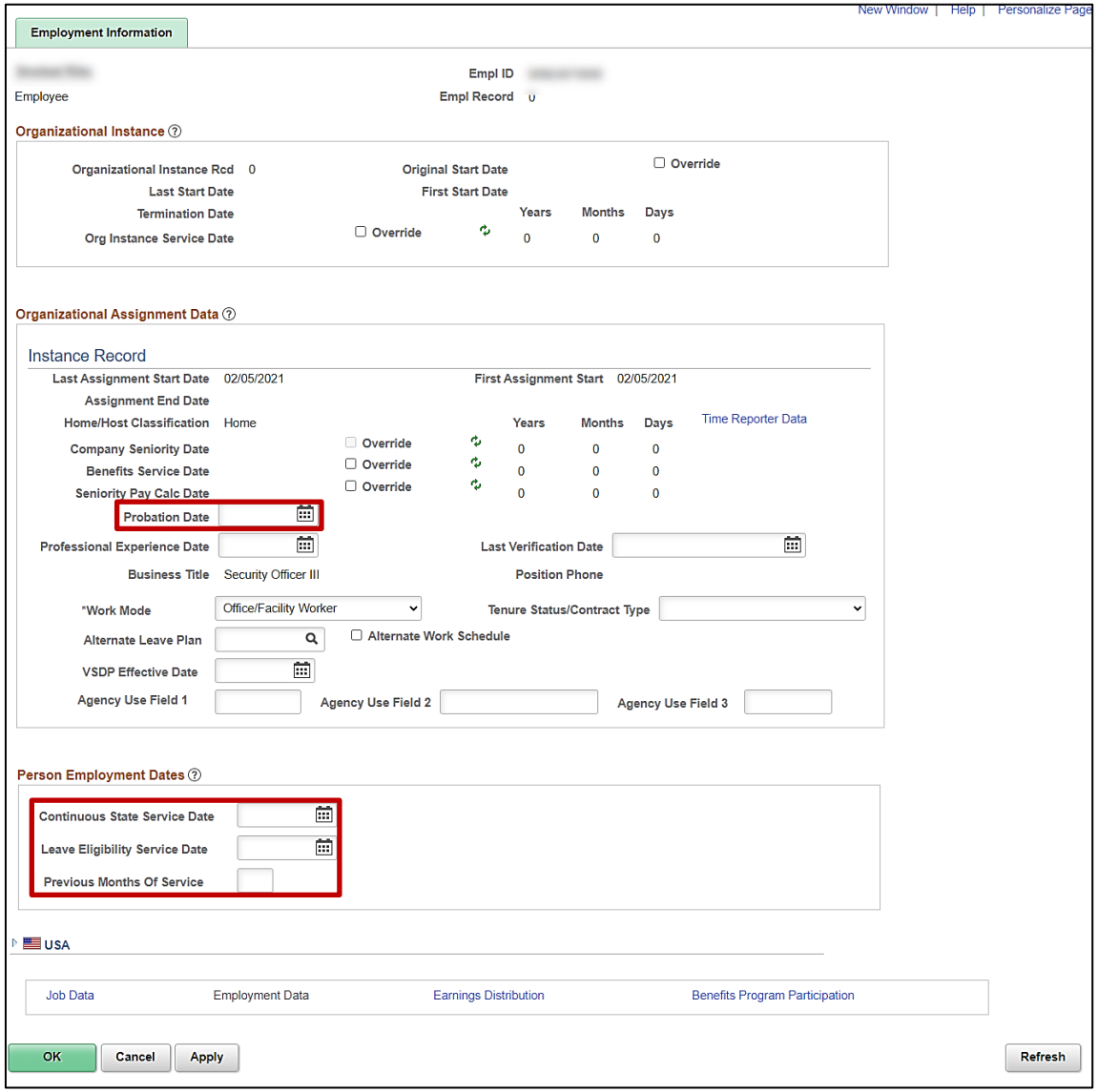
Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

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

Hiring or Rehiring an Employee (continued)

Job Data – Employment Data

Salaried employee – the Person Employment Date box populates – HR Admin updates



Hiring or Rehiring an Employee (continued)

Job Data Information – Benefits Program Participation

New Window | Help | Personalize Page

Benefit Program Participation

Employee

Empl ID

Empl Record 0

Benefit Status

1 of 1

Benefit Record Number 0

Go To Row

Effective Date 11/01/2020

Effective Sequence 0

Action Hire

HR Status Active

Reason New Hire

Payroll Status Active

Job Indicator Primary Job

Current

*Benefits System Benefits Administration

Benefits Employee Status Active

Annual Benefits Base Rate USD

ACA Eligibility Details

Benefits Administration Eligibility

BAS Group ID

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

Benefit Program Participation Details

1 of 1 | View All

*Effective Date 11/01/2020

Currency Code USD

*Benefit Program PSX

Sys delivered empty Ben Pgm

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

OK | Cancel | Apply | Refresh

Hiring or Rehiring an Employee (continued)

<u>Navigation</u>: Navigator > Workforce Administration > Personal Information > Citizenship > Identification Data

Hiring or Rehiring an Employee (continued)

The chart below outlines the criteria for using the three possible data entry methods:

	Online Entry	Mass Upload	Interface
Data Source	Entered by user	User-populated Excel template loaded by agencies, SPO, or PPS (as applicable)	System to system
Data Volume	Low to moderate volume	High volume	High volume
Frequency	Ad-hoc, Still adhere to payroll calendar	Ad-hoc, infrequent, Still adhere to payroll calendar	Ongoing, through scheduled batch processing
Data Validation	Invokes all online edits and validations	Invokes all online edits and validations	Invokes all online edits and validations
Error Handling	Data errors are addressed during real-time data entry	Rudimentary error reporting by row number only. Errors must be manually keyed into Cardinal or fixed in Excel and reloaded	Detailed errors are listed in error report and must be fixed in the source system or manually keyed into Cardinal

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. The Agency HR enters the following information on the Personal Data for the new Employee
   a) SSN, birth date, name, business email address
   b) Position and Job information
   c) Compensation

2. The Agency HR enters the following information on the Job Data for the new Employee
   a) SSN, birth date, name, business address
   b) Position, Job information, Compensation
   c) Payroll Paysheet

3. The Agency HR uses a New Hire Checklist to guide them through the new hire process.
   True or False.

DEMO

Hands-On Exercise

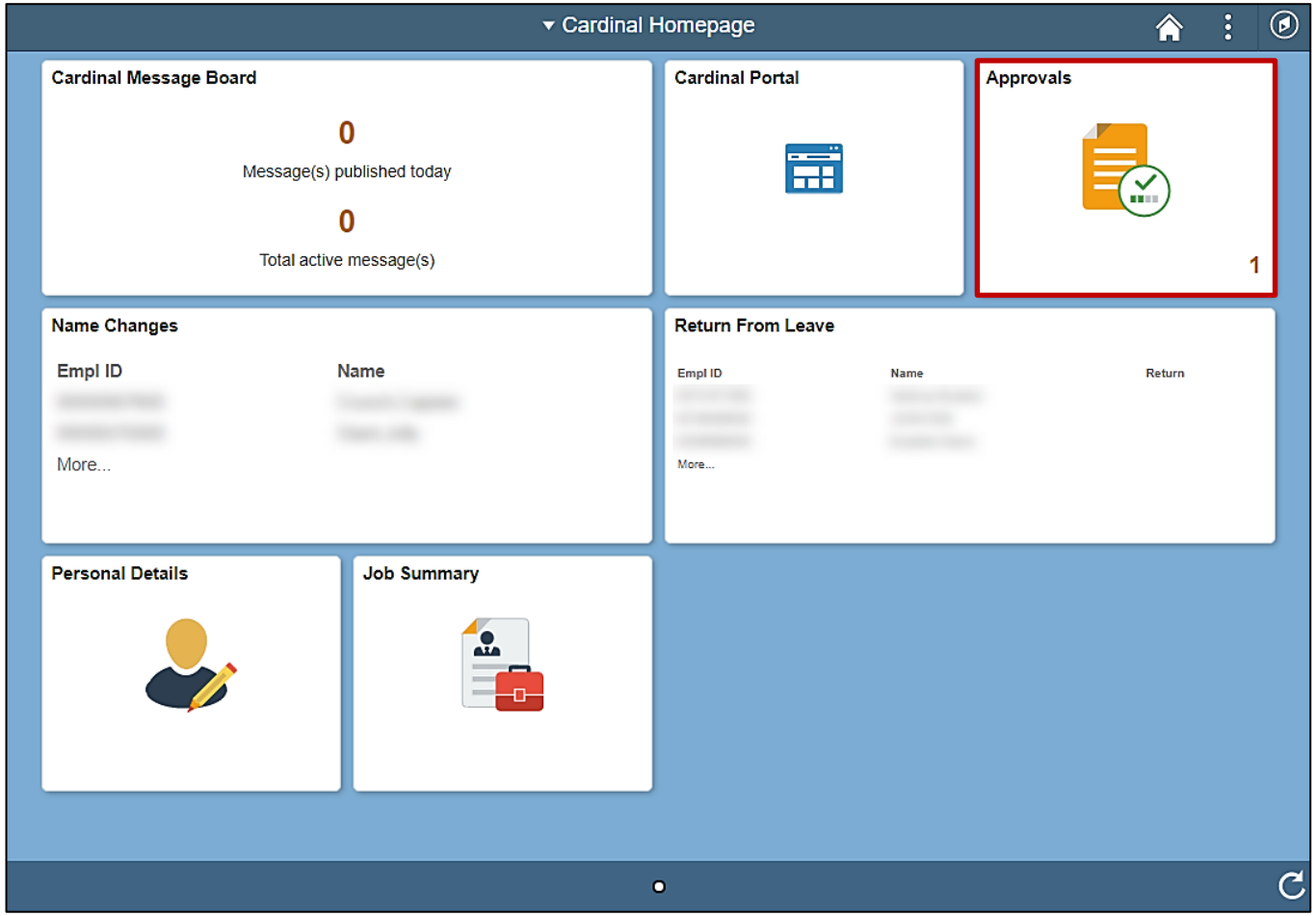
Now you have an opportunity to practice the lessons learned today in a training environment.

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

If you have any questions, please ask your instructor.

Maintaining Employee Data (continued)

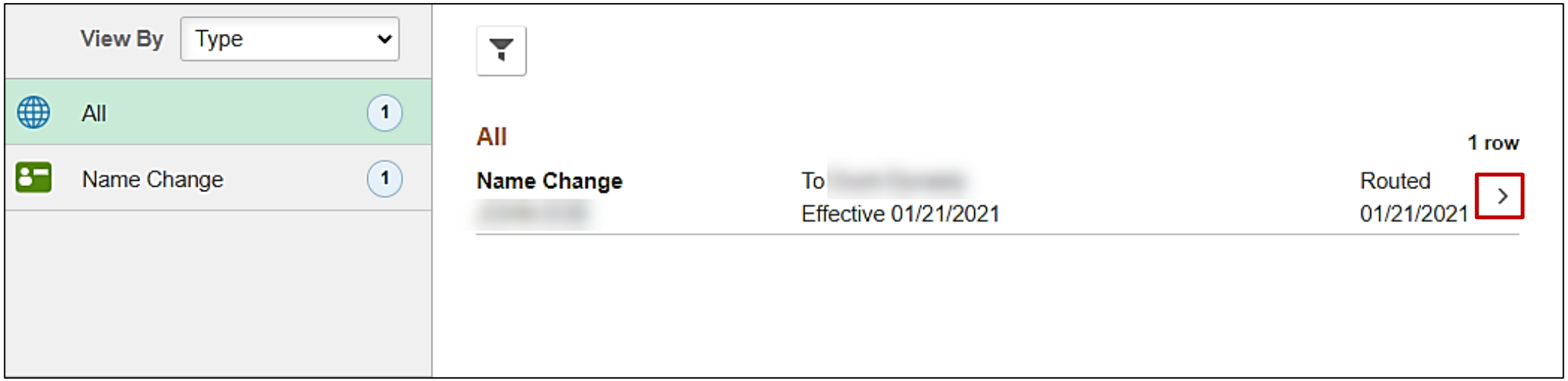
After reviewing required name change documentation the Agency HR Administrator navigates to the A**pprovals** page to approve or deny submitted name changes.



<u>Navigation:</u> Cardinal Homepage > Approvals tile

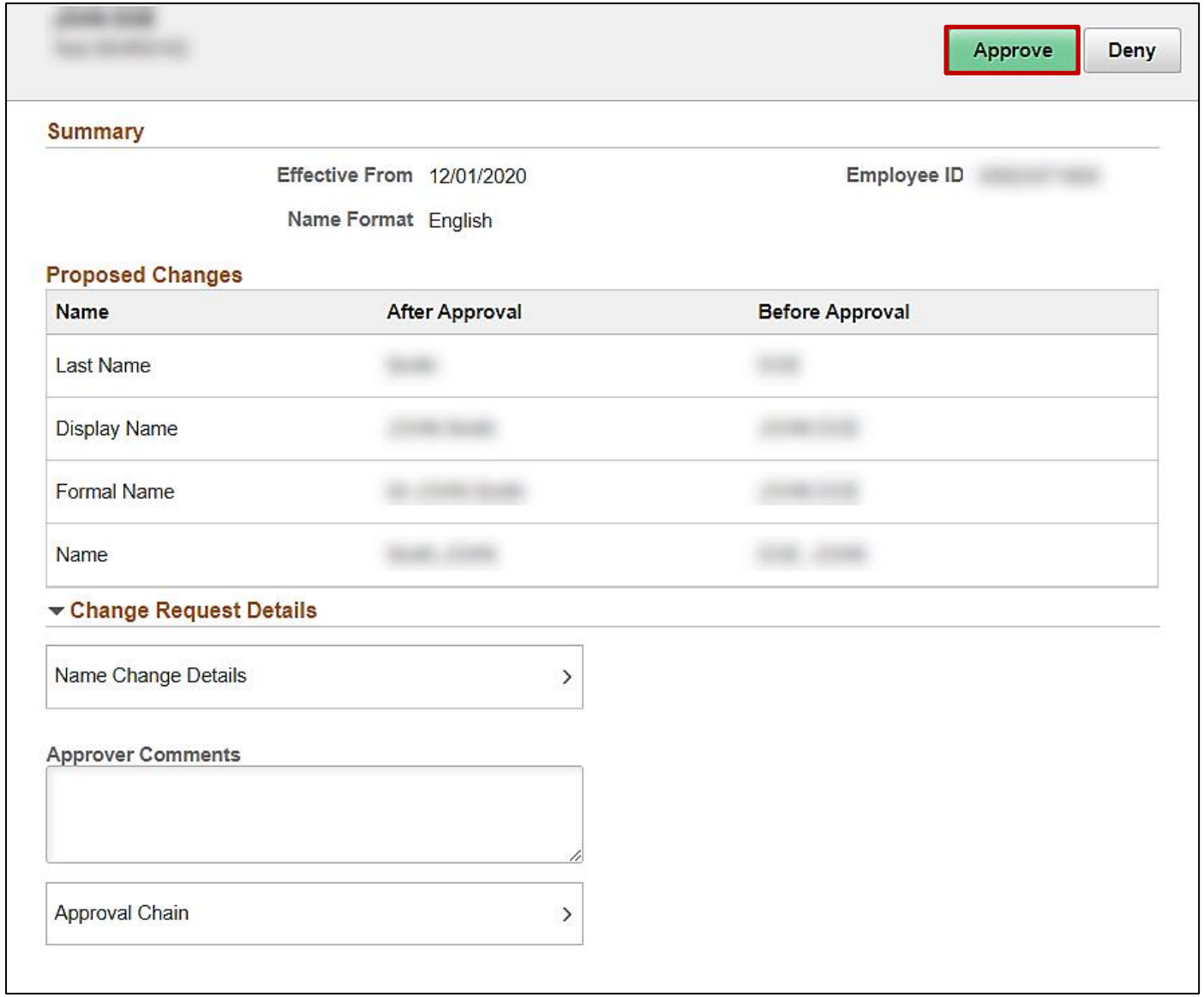
Maintaining Employee Data (continued)

Agency HR Pending Approval listing.



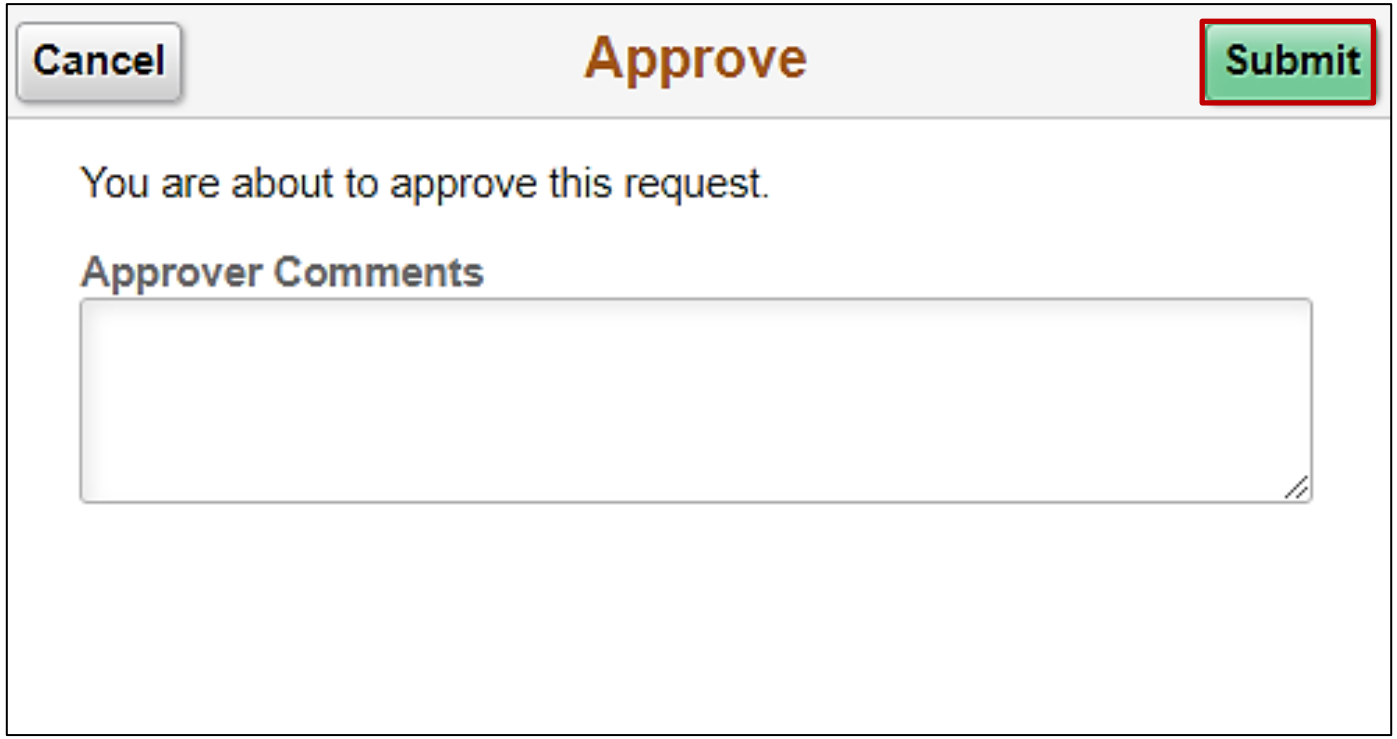
Maintaining Employee Data (continued)

Specific Name Change submission



Maintaining Employee Data (continued)

Agency HR Submit Approval



Maintaining Employee Data (continued)

Agency HR saved approved transaction.

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Intra-Agency Transfer

- 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 (e.g., 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 the Configuration Workbook to determine the appropriate Reason.
- If moving an employee from a Salary position to a Wage position the Action/Reason for the movement **out** of the position is **Termination/Resignation**.
- If moving an employee from a Salary position to a Wage position the Action/Reason for the movement **into** the new position is **Hire/New Hire**. This movement requires the agency to add a new employee instance (employee record) during the Hire process.

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 Intra-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Intra-Agency Transfer (continued)

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

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

Employee

Empl ID

Empl Record 0

Work Location Details

1 of 2

*Effective Date 11/01/2020

Go To Row

Effective Sequence 0

*Action Transfer

Reason Promotion

HR Status Active

Payroll Status Active

*Job Indicator Primary Job

Current

Position Number DLS00005 Senior Associate

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

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Intra-Agency Transfer refers to the movement of an employee from one position to another within the same agency.
   True or False.

2. Additional job data (e.g., compensation) fields are updated, as applicable.
   True or False.

3. The employee stays in the same position when an Intra-Agency Transfer is completed.
   True or False.

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Inter-Agency Transfer

An Inter-Agency Transfer is defined as the movement of an employee from one Agency to another Agency.

Verify that all necessary data is in hand prior to moving forward with keying the transfer transaction. Agency HR will verify that the correct position number is known and that the position includes the correct job code, title, and location code. The position will default the applicable salary plan and grade.

Agency HR updates the employee's job data.

The sending and receiving agencies coordinate the effective date of the termination (sending) and the effective date of the hire (receiving). The Action/Reasons "**Transfer Out**" and "**Transfer In**" ensure the employee maintains an active Benefits Status.

The receiving agency adds a new employee instance (employee record) during the Hiring process. If the employee is returning to an agency, use the employee's original employee record from that agency during rehire transaction.

The Action/Reason of "Transfer In" reactivates the employee's HR and Payroll Status after they are terminated by the sending agency. The coordinated effective date ensures the employee does not experience a break in service.

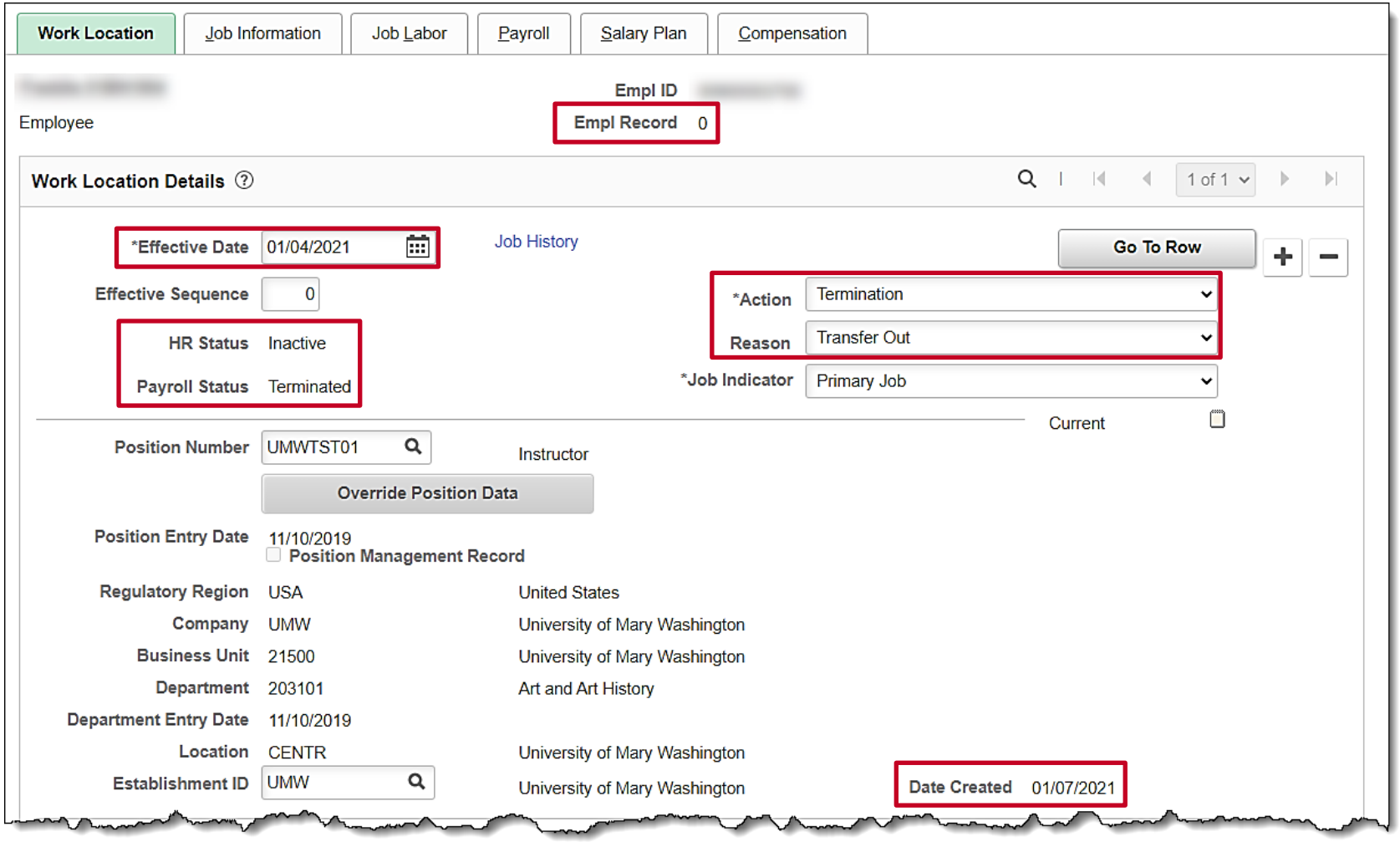
Update additional job data (e.g., compensation) information, as applicable.

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

Inter-Agency Transfer (continued)

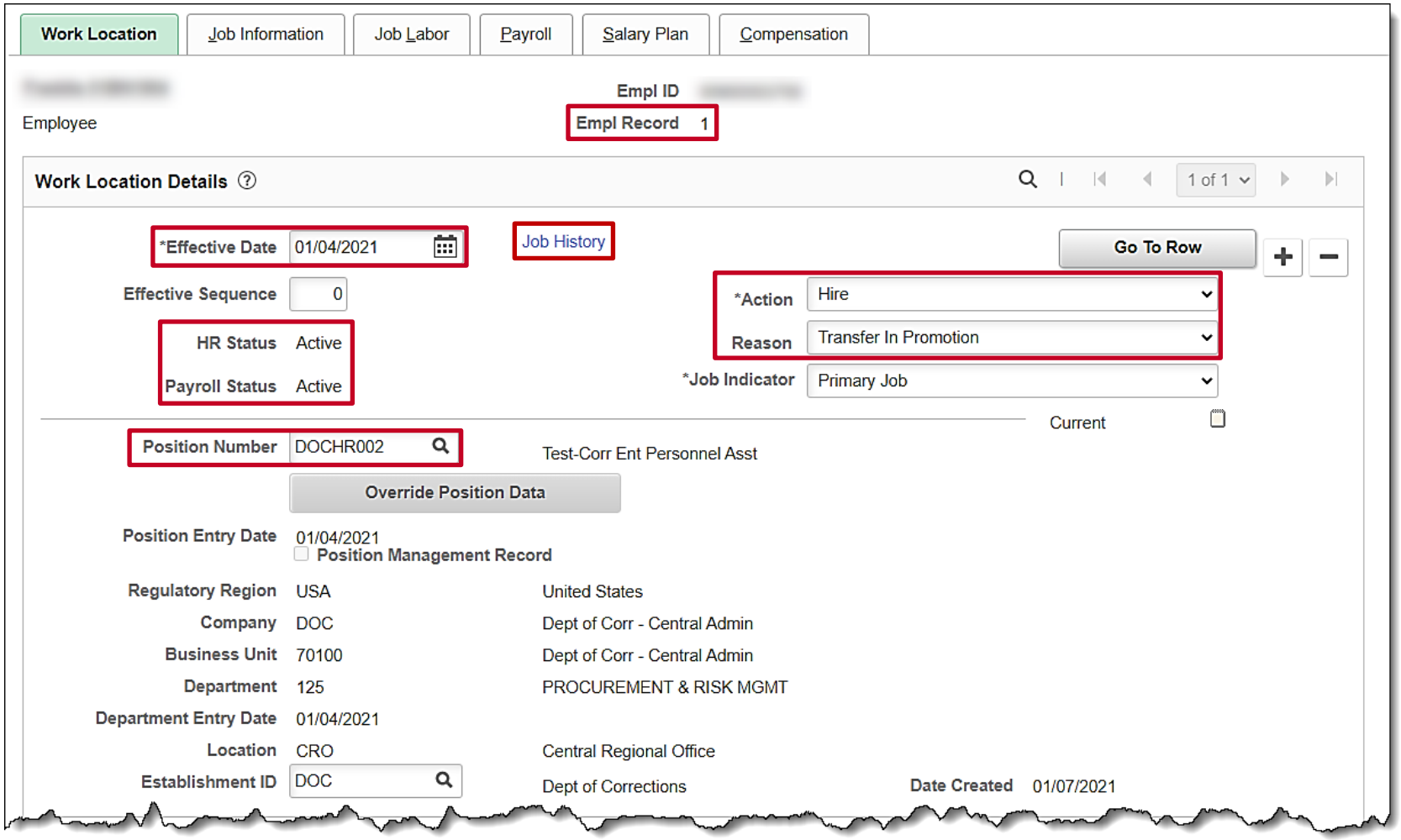
The Sending Agency selects “Termination” from the **Action** field drop-down menu and “Transfer Out” from the **Reason** field drop-down menu.



<u>Navigation</u>: Navigator > Workforce Administration > Job Information

Inter-Agency Transfer (continued)

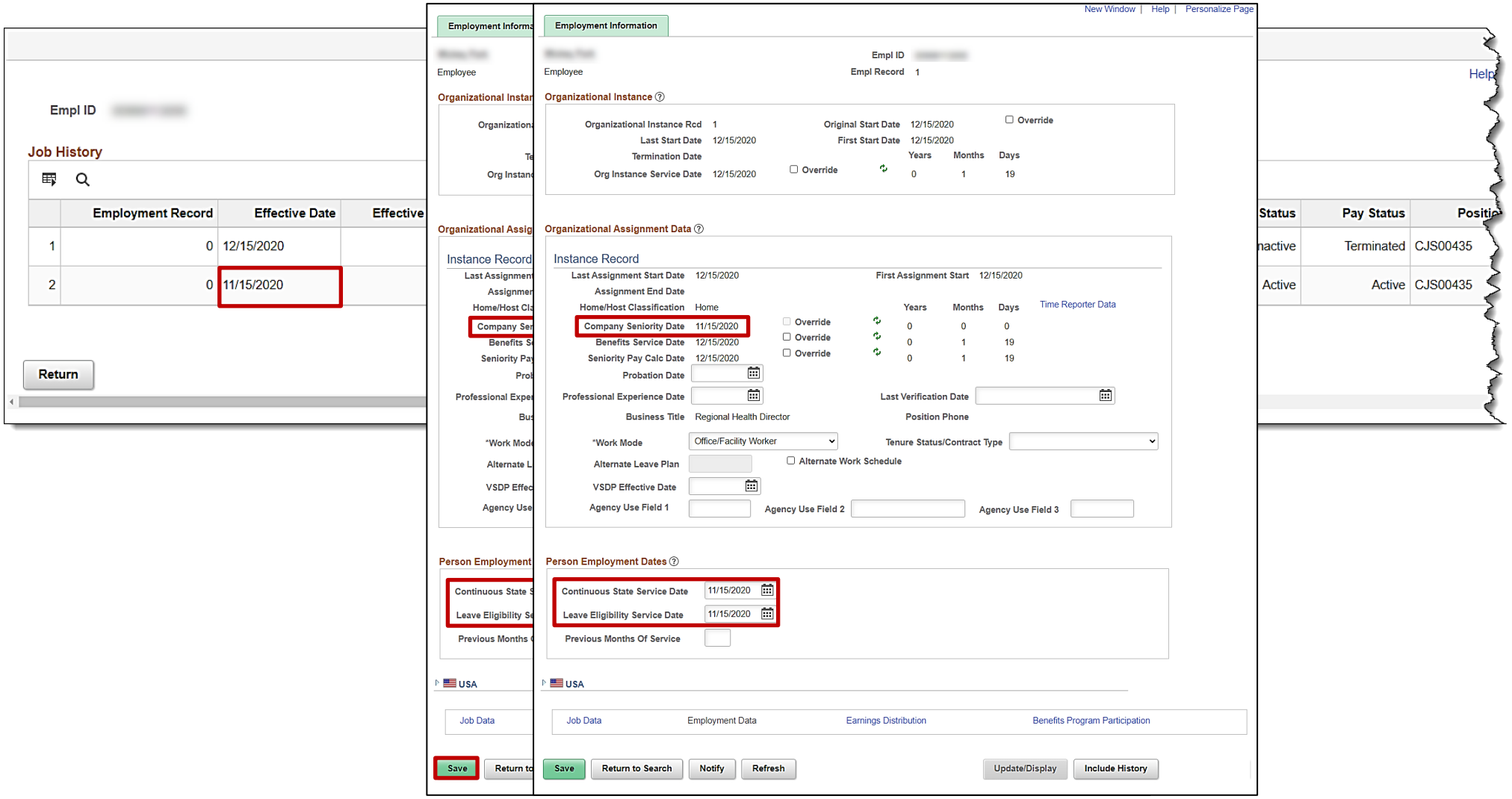
The Receiving Agency selects “**Hire**” from the **Action** field drop-down menu and “**Transfer In**” from the **Reason** field drop-down menu.



<u>Navigation</u>: Navigator > Workforce Administration > Job Information

Inter-Agency Transfer (continued)

The Receiving Agency manually updates the employee's **Leave Service Eligibility Date** and **Continuous State Service Date** fields, which populate the **Company Seniority Date** field.



<u>Navigation</u>: Navigator > Workforce Administration > Job Information

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Inter-Agency Transfer refers to the movement of an employee from one Agency to another Agency.
   True or False.

2. The Action/Action Reason the receiving agency uses maintains an active HR Status and an active Payroll Status (if applicable).
   True or False.

3. The employee stays in the same position when an Inter-Agency Transfer is completed.
   True or False.

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Maintain Leave Status (Paid and Unpaid)

- Place **SALARIED** employees in paid or unpaid leave status
  - Hourly employees generally not eligible for leave

- Keyed manually or load via Mass Upload Process

- Continue to examine change in status and work with employee to complete documentation

- Within Cardinal:
  - Link employee to Leave of Absence Checklist
  - Change employee's status to Leave of Absence
  - Extend the employee's expected return date
  - Return the employee from leave

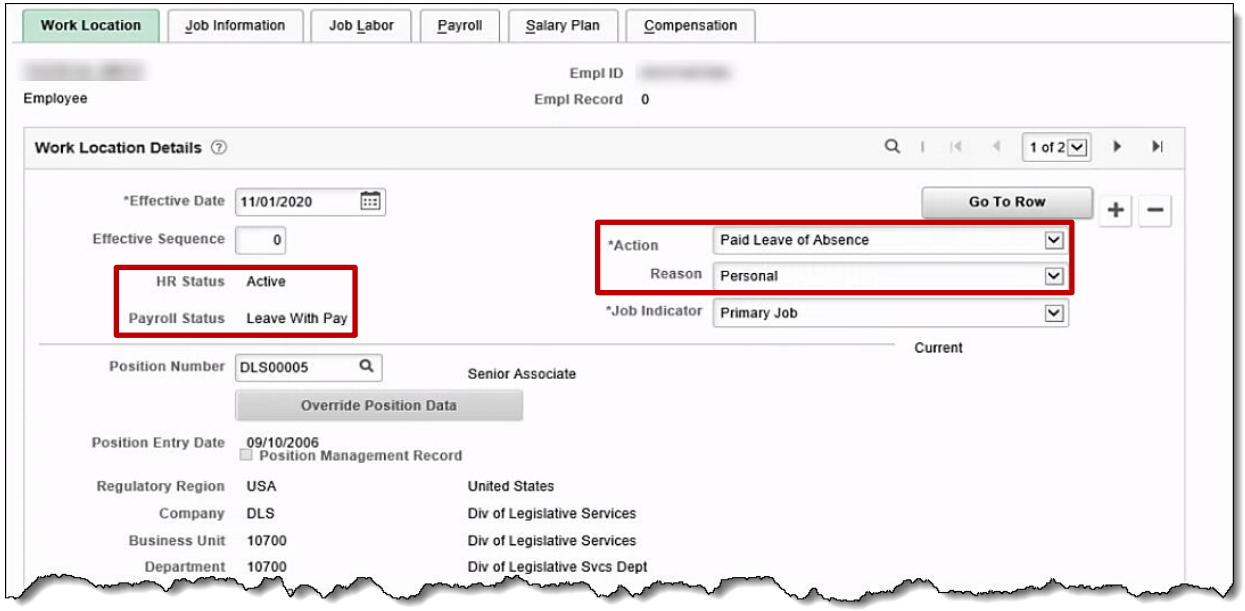
- Use Job Record Notepad to capture non-confidential comments or further explain transactions

For further information on Managing Leaves of Absence, see the Job Aid titled **HR351 Managing Leave of Absence**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

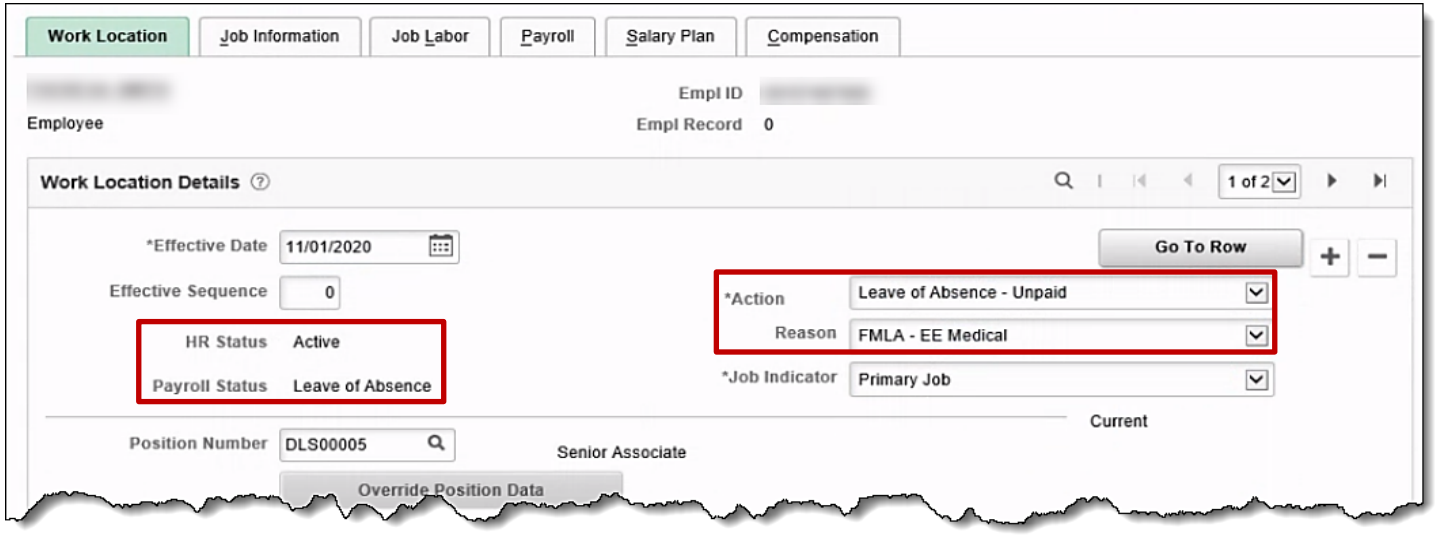
For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Maintain Leave Status (continued)

Leave of Absence (Paid)



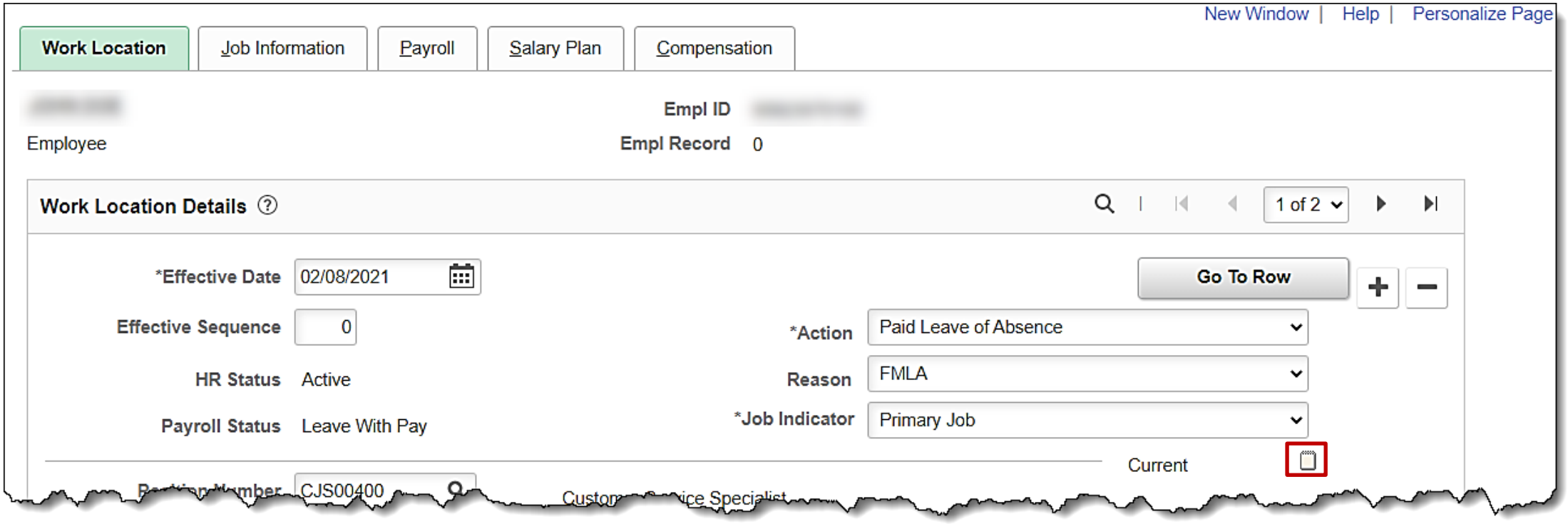
Leave of Absence (Unpaid)



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

Maintain Leave Status (continued)

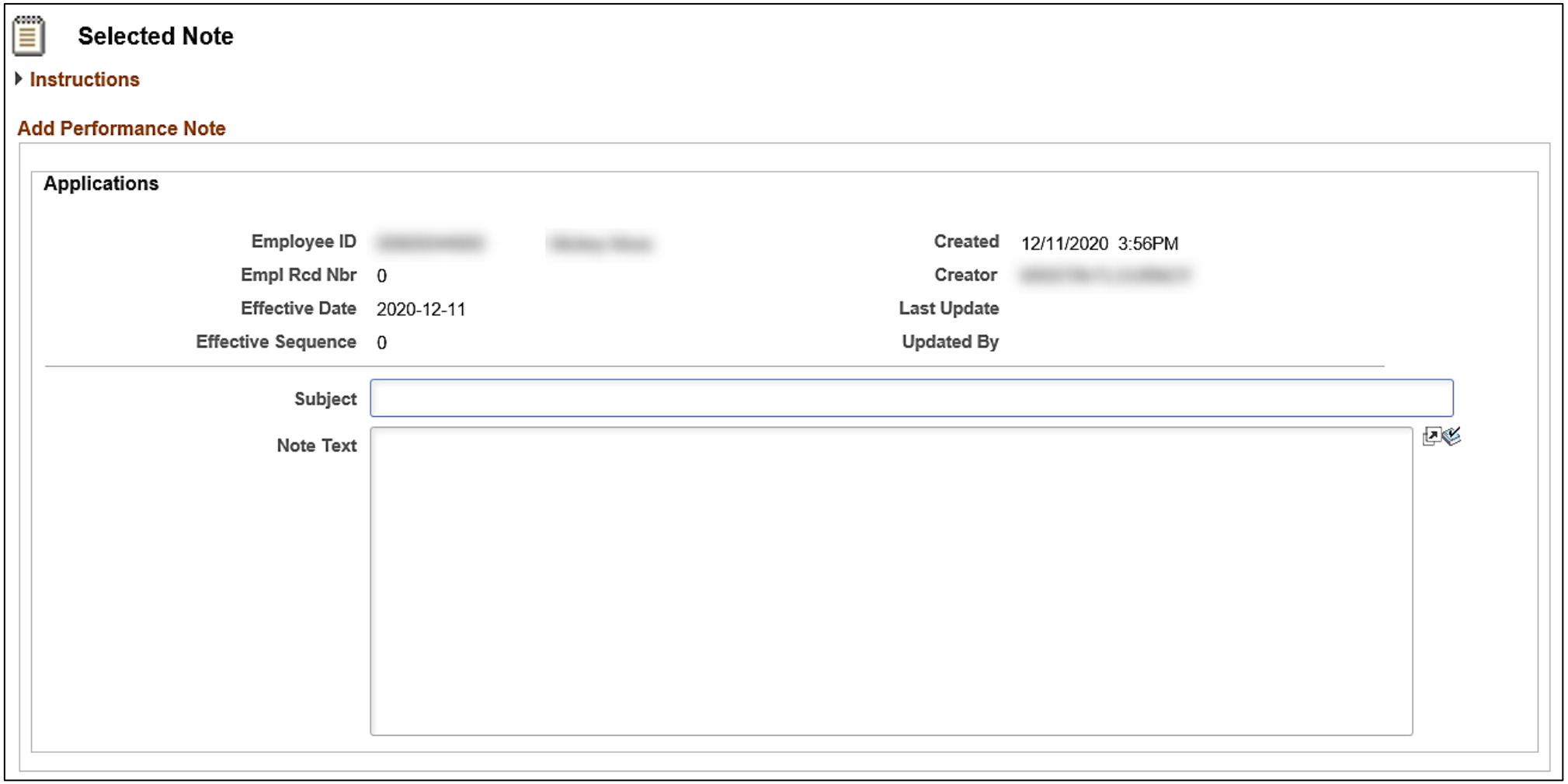
Example of Notepad functionality - Use as you would have used it on the PMIS screen.



<u>Navigation</u>: Navigator > Workforce Administration > Job Information > Job Data

Maintain Leave Status (continued)

Notepad functionality



Navigation: **Navigator > Workforce Administration > Job Information > Job Data**

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. The Agency HR uses the Notepad functionality to track Leave Status information.
   True or False.

2. The Agency HR is required to insert a row on the Job Record to place the employee on Leave.
   True or False.

3. The Agency HR is required to insert a row to return the employee from Leave of Absence.
   True or False.

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Separate Employee

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

Voluntary and Involuntary separations are keyed to inactivate the employee record. Action/Action Reasons are used to reflect the type of separation.

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. Productive and non-productive time can still be entered and approved prior to the effective date of the Layoff. The updated HR status stops leave accruals.

- The updated Payroll status does not create a Paysheet for the employee.

Separate Employee (continued)

- 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

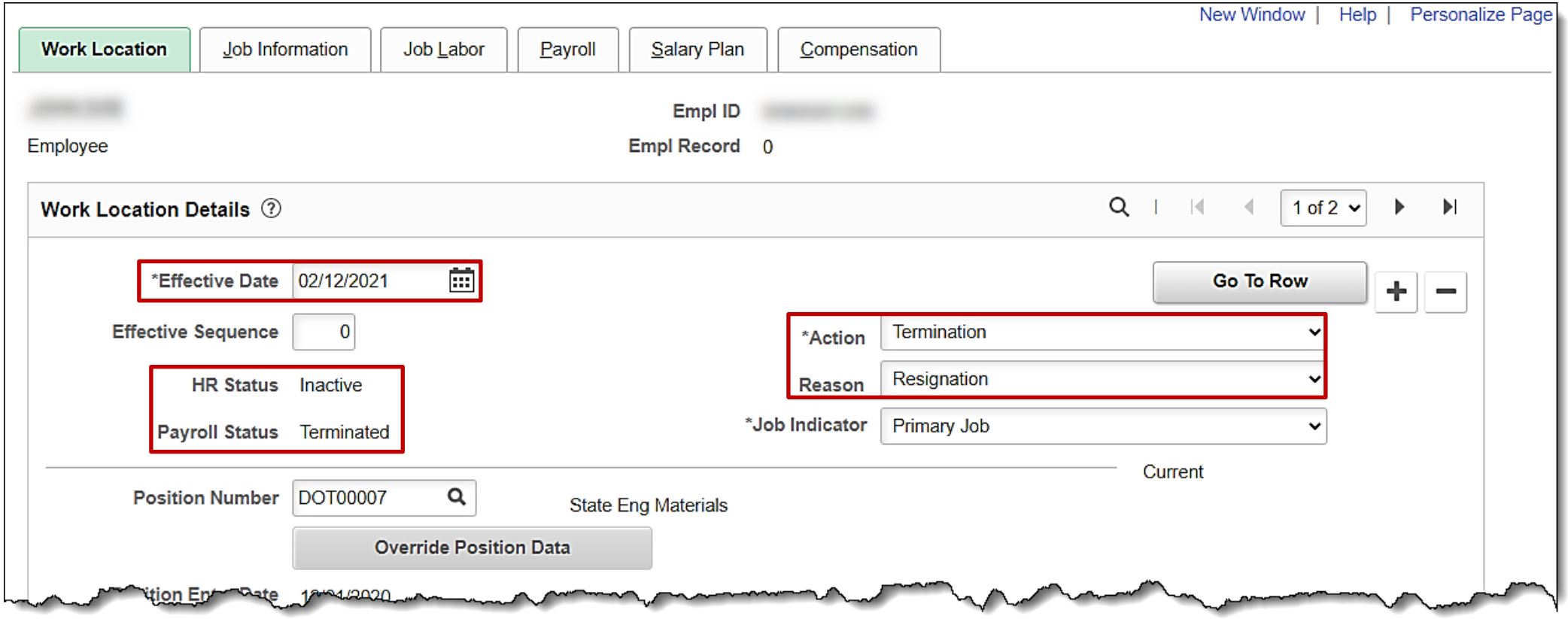
- Link employee to Termination Checklist to guide through the termination process

For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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**.

For further information on the Layoff Process, see the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Separate Employee (continued)



Navigation: **Navigator > Workforce Administration > Job Information > Job Data**

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Examples of Involuntary Termination include Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.
   True or False.

2. Examples of Voluntary Termination include Resignation, Retirement, and Death.
   True or False.

3. The effective date of a termination is the day after the last day worked.
   True or False.

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Mass HR Data Maintenance

- Agencies load large volumes of data to Cardinal using Excel-based mass upload tool
  - Lacks detailed error reporting capability, so use infrequently

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

Mass Upload Data Types	Loaded by Agency	Loaded by SPO	Loaded by PPS
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	

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Lesson Summary

3 Setup and Maintain Employee HR Data

In this lesson, you learned:

- How to create and maintain position data
- How to Hire/Rehire employee
- How to maintain employee data (ESS)
- 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
- How to complete mass change to HR Data

Lesson Summary (continued)

3 Setup and Maintain Employee HR Data

- Employee Self Service provides an employee access to view and update personal data
- Agency HR are required to approve specific Self Service actions:
  - Marital Status Change
  - Change of Name
  - Change of Address
  - Approval Process done by Agency HR

Next Six Topics are focused on VPA Agencies only

Lesson

4 Maintain Employee Pay

This lesson covers the following topics:

- Maintaining Employee Compensation
- Maintaining Employee Additional Pay

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 (e.g., Agency-wide compensation actions) to PPS for uploads

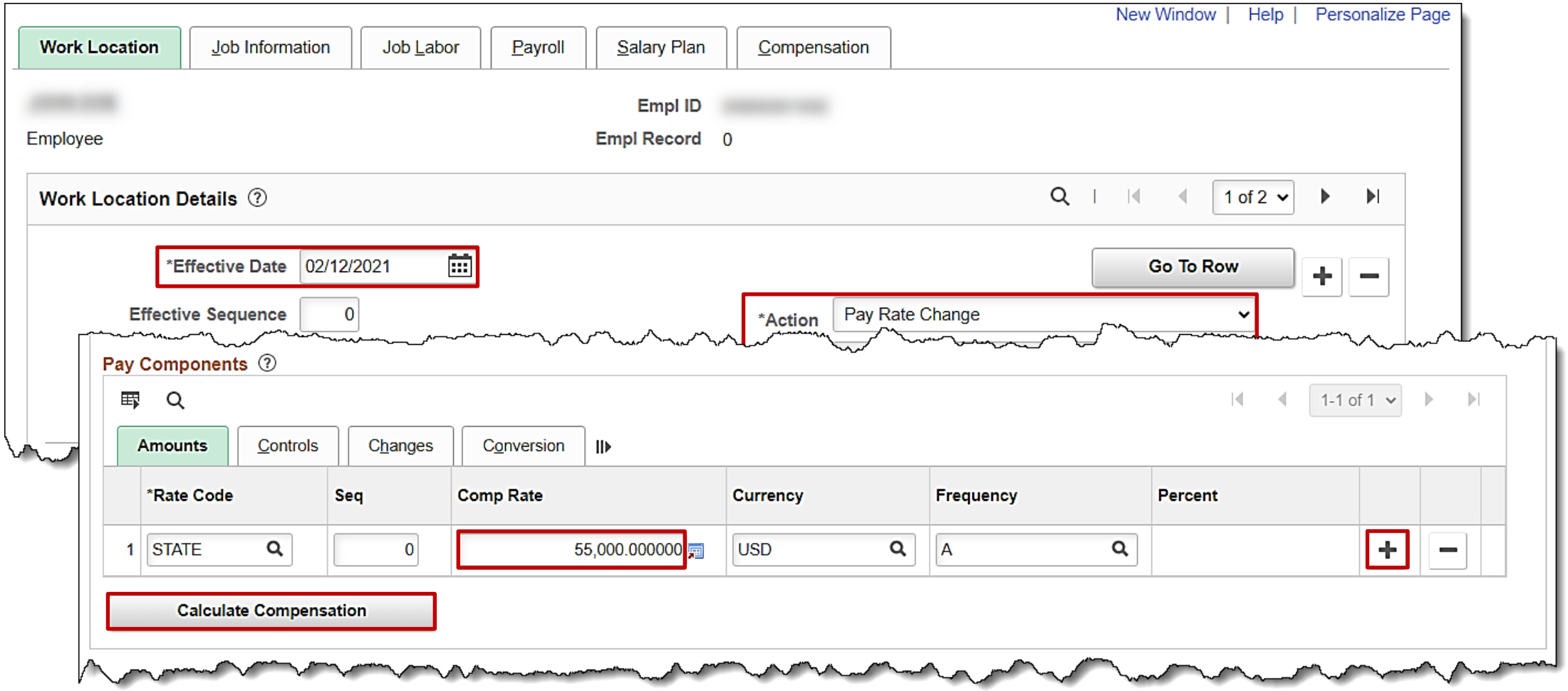
- Bonuses not tracked/paid through Employee Job Record (covered later in course)

- Payroll Administrator runs reports and queries for reconciliation process

For further details on Rewards and Recognitions, see the Job Aid titled **HR351 How to Change /Update Employee Compensation**. 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 **HR351 Mass Update**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Updating Employee Compensation (continued)



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. True or False. Changes to compensation are completed on the employee personal information.

2. True or False. Leave awards and monetary awards are entered on the Job Record for payment.

3. True or False. Payroll Administrators have access to run the Compensation Reports/Queries.

Maintaining Employee Additional Pay

- 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 payment in SPOT

- For partial amounts due to Mid-Pay Period changes:
  - Effective Date is last day of prior Pay Period
  - Payroll Admin calculates prorated amount
  - Payroll Admin processes payment in SPOT

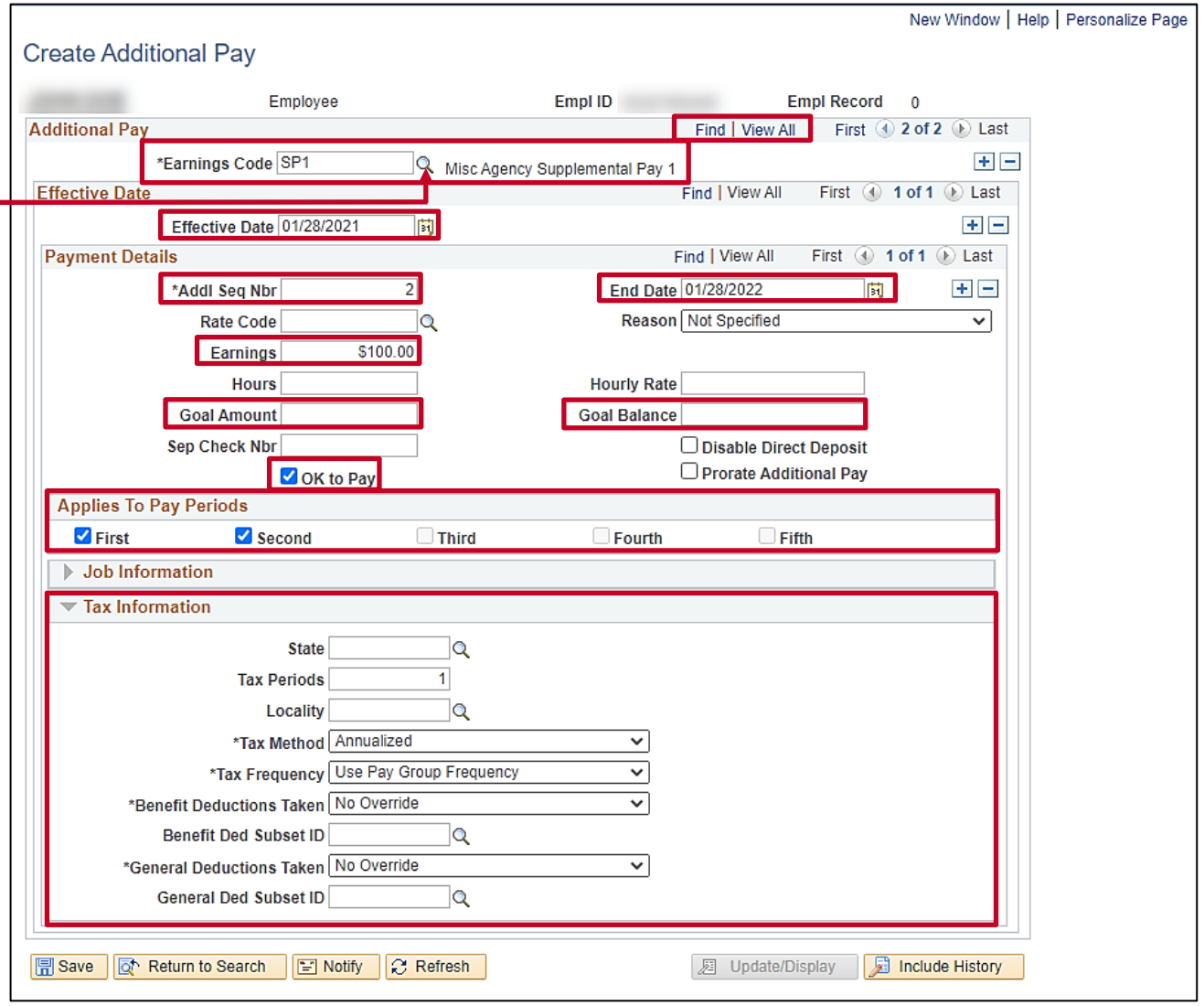
- Only HR enters Additional Pay transactions

For further information on SPOT payments, refer to the Job Aid titled **PY381 Using the Single-Use Payroll Online TOOL (SPOT)**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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**.

Maintaining Employee Additional Pay (continued)

Payroll Administrators verify the correct **Pay Periods** and the **OK to Pay** checkboxes are selected.



<u>Navigation</u>: Navigator > Employee Pay Data USA > Create Additional Pay

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. An employee receives base salary on the additional pay line.
   True or False.

2. Additional pay is added to an employee's paycheck to reflect:
   a) Temporary pay, military pay, adjunct pay, stipends
   b) Leave of absence, stipends
   c) Short term disability

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Lesson Summary

4 Maintain Employee Pay

In this lesson, you learned:

- How to Maintain Employee Compensation
- How to Maintain Employee Additional Pay

Lesson

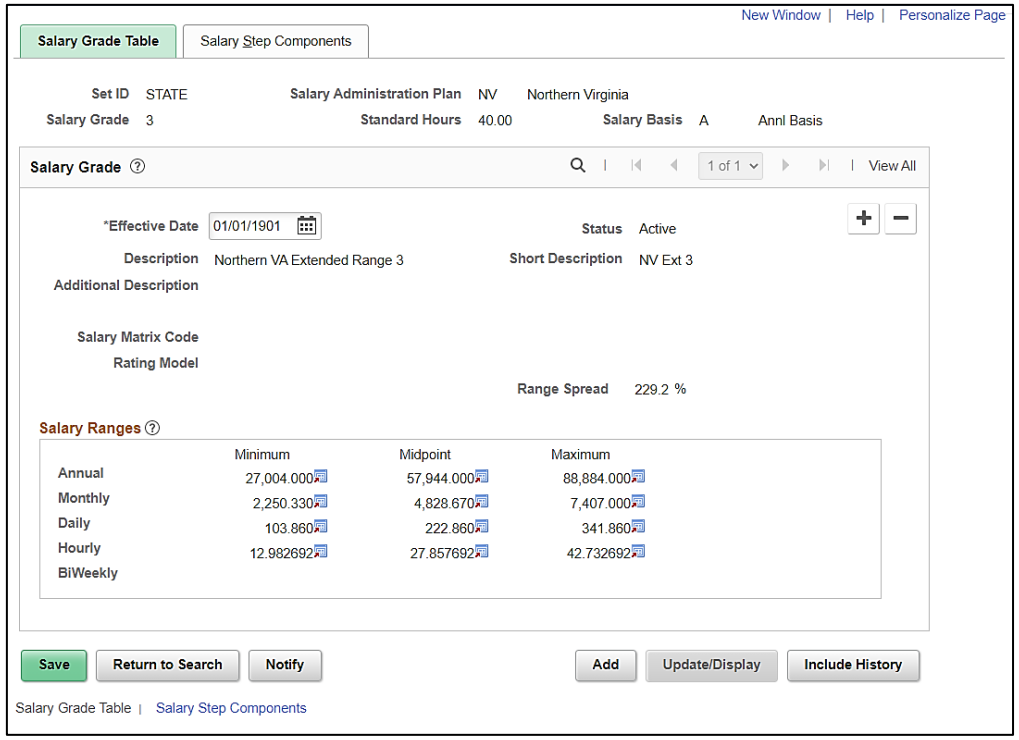
5 Administer Salary Plans (Alternate Plans)

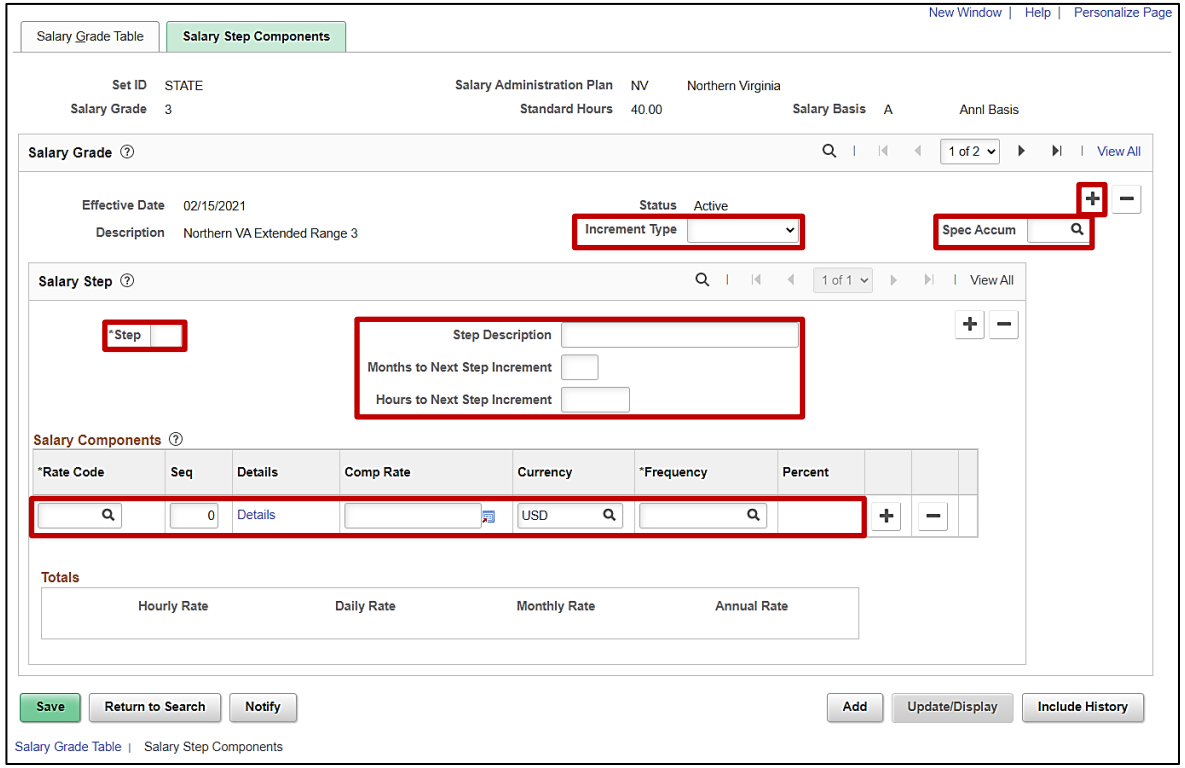
This lesson covers the following topics:

- Administering Alternate Salary Plans/Grades/Steps

Administering Salary Plans/Grades/Steps

- Only applicable for agencies using alternate salary plan
- Update Alternate Salary Plan with new required steps

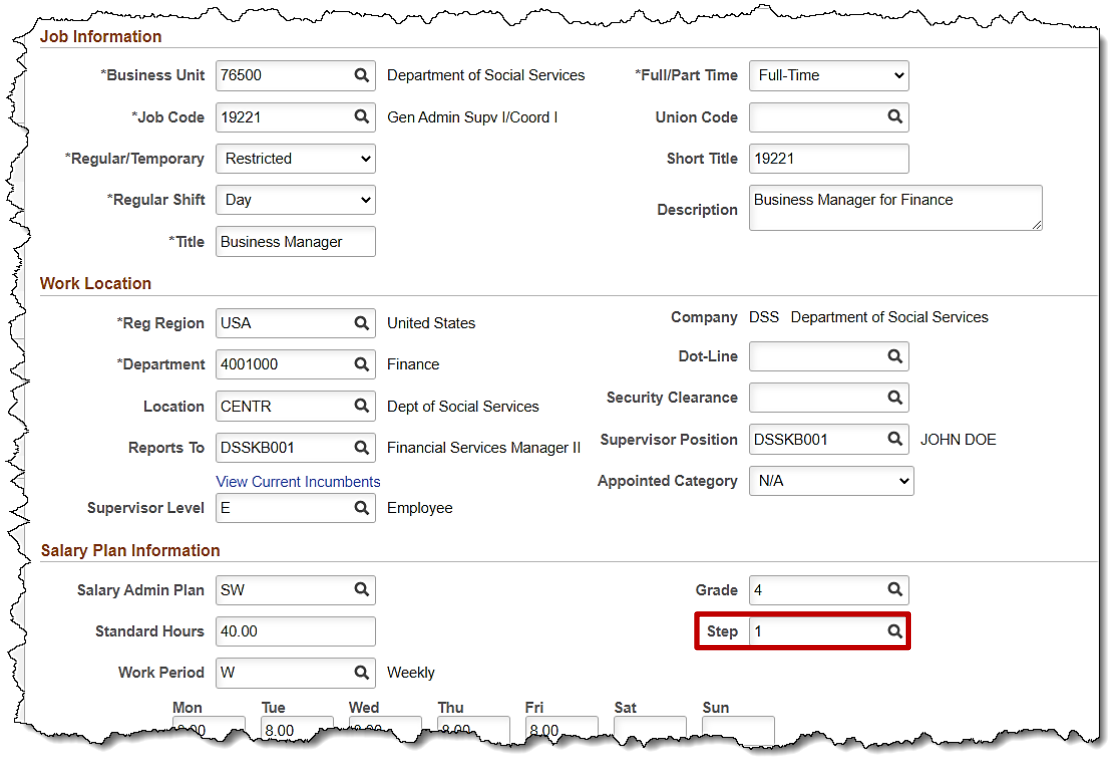




<u>Navigation</u>: Navigator > Set Up HCM > Product Related > Compensation > Base Compensation > Salary Grades

Administering Salary Plans/Grades/Steps

- Update Position with new Step value
  - Updates record to reflect the Alternate Salary Plan/Grade/Step.



- Update Job Record with new salary if applicable.

For further information on updating the Salary/Plan Step, see the Job Aid titled **HR351 Salary/Plan Step Configuration**. For further information on updating the employee's compensation, see the Job Aid titled **HR351 How to Change/Update Employee Compensation**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.

<u>Navigation</u>: Navigator > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. After an Alternate Plan is added by DHRM, Agency HR has access to add steps to salary plan/grades.
   True or False

2. Agency HR has the ability to add an alternate grade to a position.
   True or False

3. The Salary Plan is associated with the location code.
   True or False

DEMO

Lesson Summary

5 Administer Salary Plans

In this lesson, you learned:

- How to Administer Salary Plans/Grades/Steps

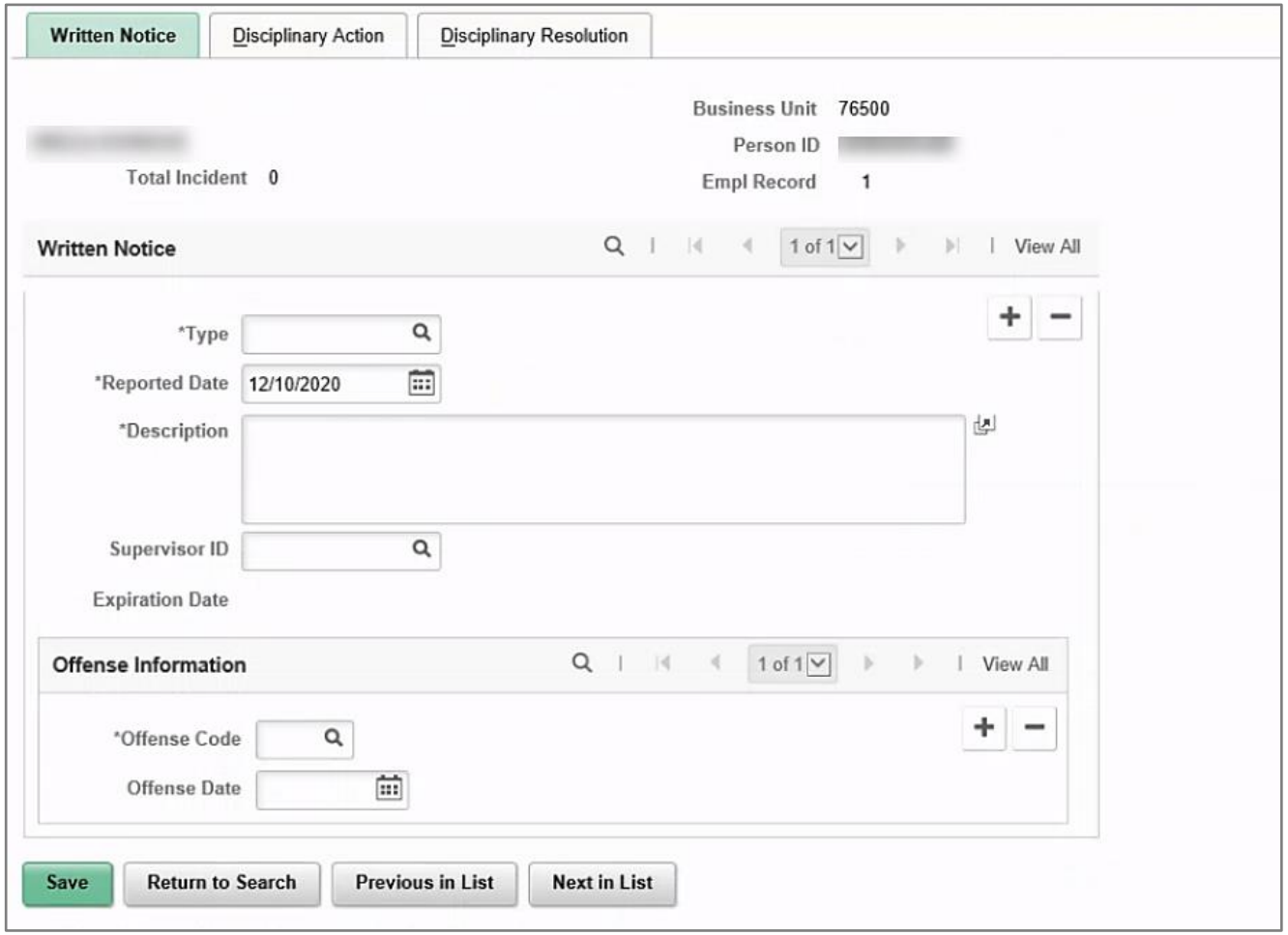
Lesson

6 Maintain Additional HR Data (HR Level 1)

This lesson covers the following topics:

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

Entering and Maintaining Disciplinary Actions



<u>Navigation</u>: Navigator > Workforce Administration > Labor Administration > Record Disciplinary Actions

For further information on completing a Separation, 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**.

DEMO

Entering and Maintaining Performance Rating

- Standard annual statewide employee performance management cycle is 12-month period from October 25 – October 24

- Not all agencies use defined performance cycle start and end dates
  - For standard cycle, performance evaluation results required to be entered on/before mid-November

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

- DHRM defaults all employee ratings to C – Contributor (L – Leave if employee's status is "Leave")
  - Only update if other than C – Contributor

- 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

- Initiate Separation as required

For further information on completing a Separation, see the Job Aid titled **HR351 Performance Ratings**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

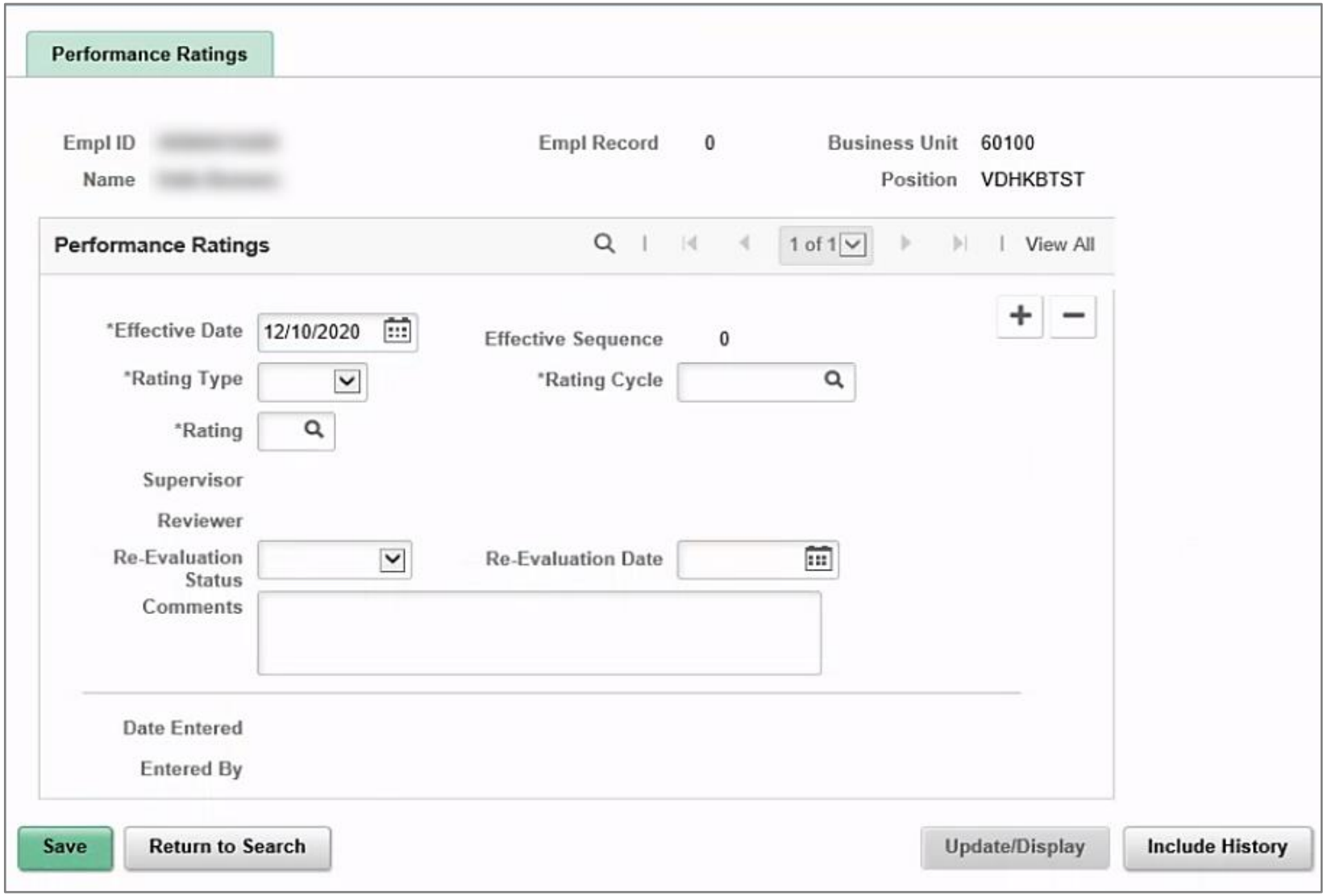
Entering and Maintaining Performance Rating (continued)

- Mass upload processing can be used to change performance ratings from C – Contributor
- DHRM maintains and communicates cycles and cycle effective dates
- If statewide compensation increase calls for certification of performance ratings, DHRM communicates Performance Certification (i.e., effective date the performance cycle)
- Performance ratings may factor in of pay adjustment decisions; maintain compliance with DHRM Performance Management Policy 1.65

For further information on Mass Uploads, see the Job Aid titled **HR351 Mass Uploads**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Compensation Changes, see the Job Aid titled **HR351 Maintain Compensation**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Entering and Maintaining Performance Rating (continued)



Navigation: **Navigator > Workforce Development > Performance Management > Performance Rating**

DEMO

Entering and Maintaining Rewards and Recognition

- Agency HR runs by-agency Rewards and Recognition Report
  - YTD totals by Employee and by Type (confirm/deny compliance)
  - Includes both Leave and Monetary Awards

- Cardinal Rewards and Recognition tracks the following:
  - 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 Loan

Entering and Maintaining Rewards and Recognition

Leave Reward

- Agencies **NOT** using Cardinal Absence Management
  - Enter Leave Award information through Cardinal **Rewards and Recognition** page
  - Also enter Leave Award hours in external leave system of record
  - Cardinal does not interface to external systems of record

- Agencies using Cardinal Absence Management
  - Enter Leave Awards as balance adjustments or entitlements in Cardinal Absence Management
  - Consolidated reporting pulls Leave Awards from **Rewards and Recognition** page and Cardinal Absence Management to show statewide totals

Monetary Bonus

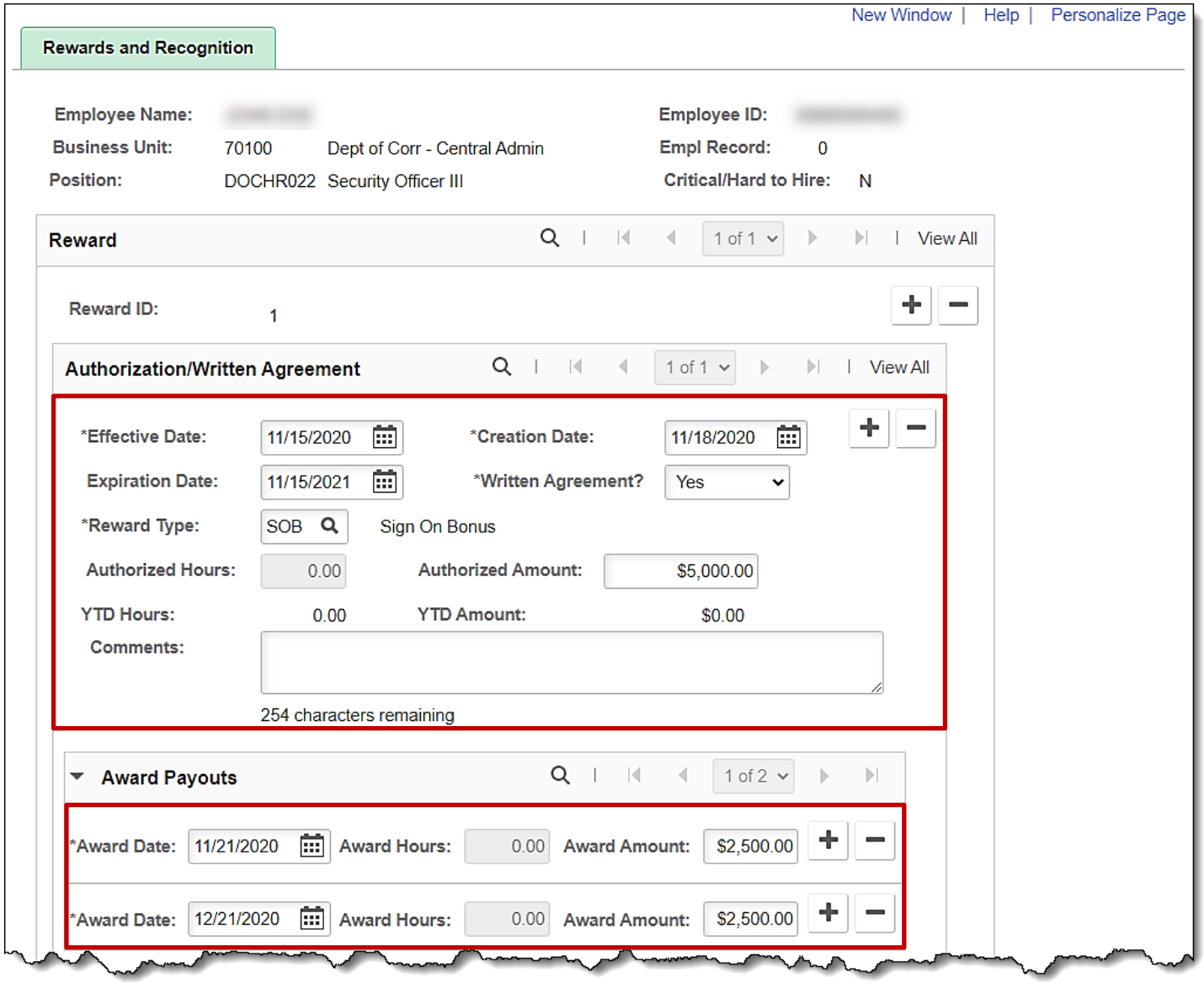
- Agency HR tracks employee's:
  - Written Agreement
  - Expiration date of the Written Agreement per incentive bonus
  - Payment Installments (singular or multiple – as needed)

- 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 Mass Uploads see the Job Aid titled **HR351 Rewards and Recognition**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Entering and Maintaining Rewards and Recognition



Navigation: **Navigator > Workforce Development > Reward and Recognition**

Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.

1. Disciplinary actions are recorded for:
   a) Classified employees only.
   b) All employees

2. Performance ratings are entered every month for all employees.
   True or False.

3. Reward and recognition pages in Cardinal are used to track an annual bonus for all employees.
   True or False.

DEMO

Hands-On Exercise

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

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

If you have any questions, please ask your instructor.

Lesson Summary

6 Maintain Additional HR Data

In this lesson, you learned:

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

Course Summary

HR351 HCM Cardinal Employee Data Setup and Maintenance

In this course, you learned:

- There is a relationship between position, job data, personal data, and job record
- How to add, create, and maintain a position
- How to hire an employee online
- How to hire an employee using a mass update process
- How to enter job data updates
- How to enter additional pay information
- What steps must be completed by the HR Administration to manage benefits
- How to complete a mass change transaction
- How to review the upload error report

Appendix

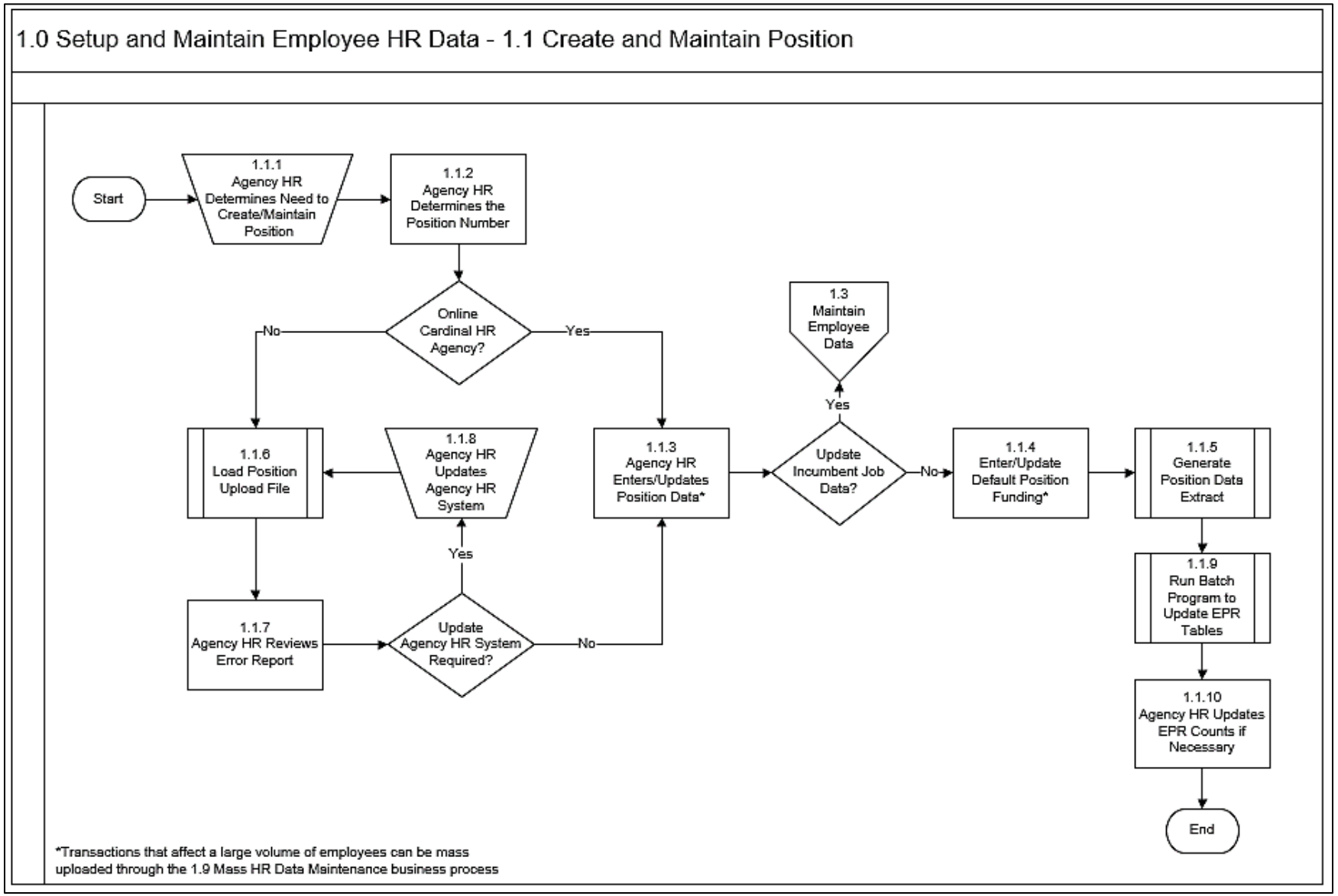
Process Flowchart Key

Process Flows

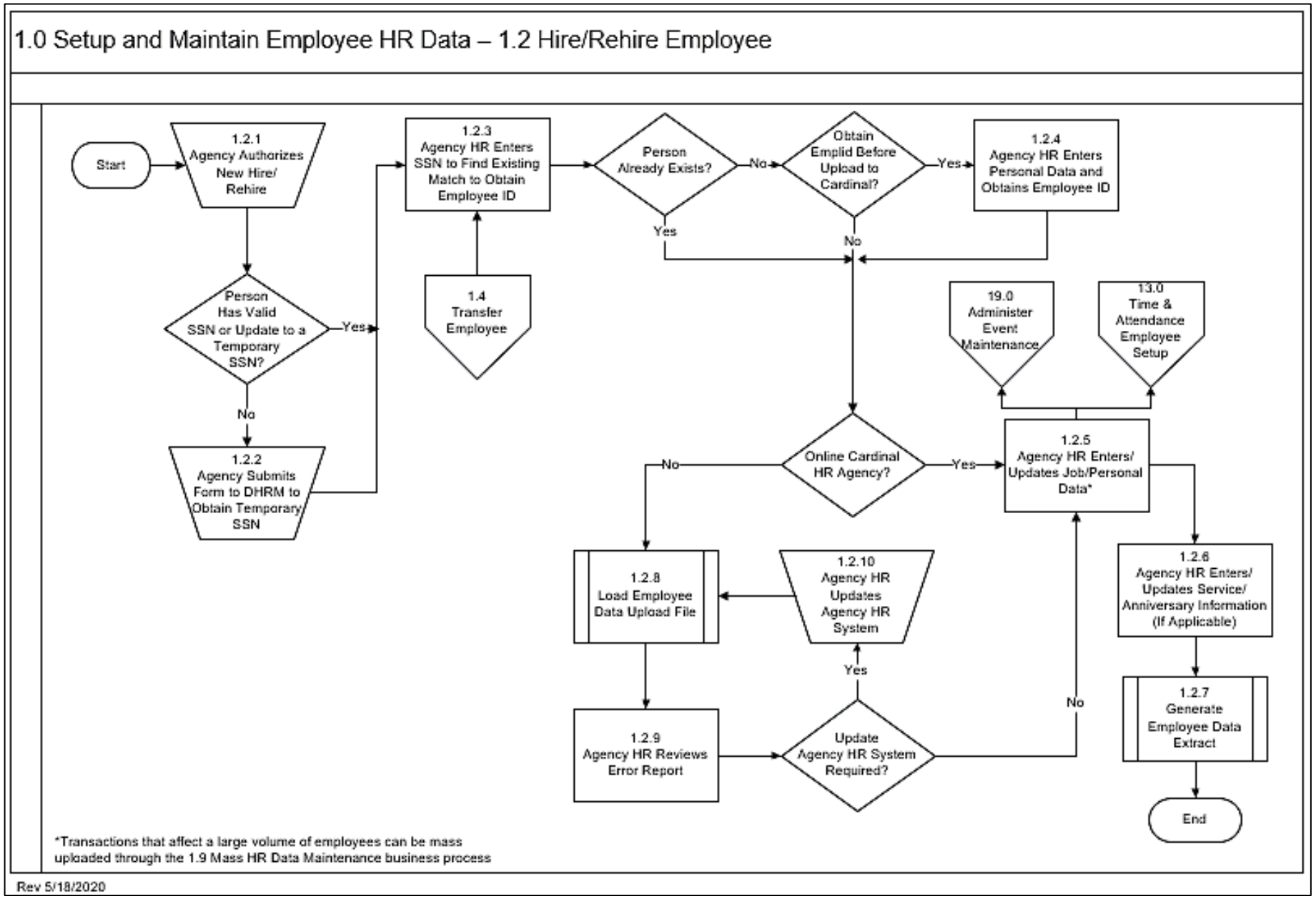
Flowchart Key

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

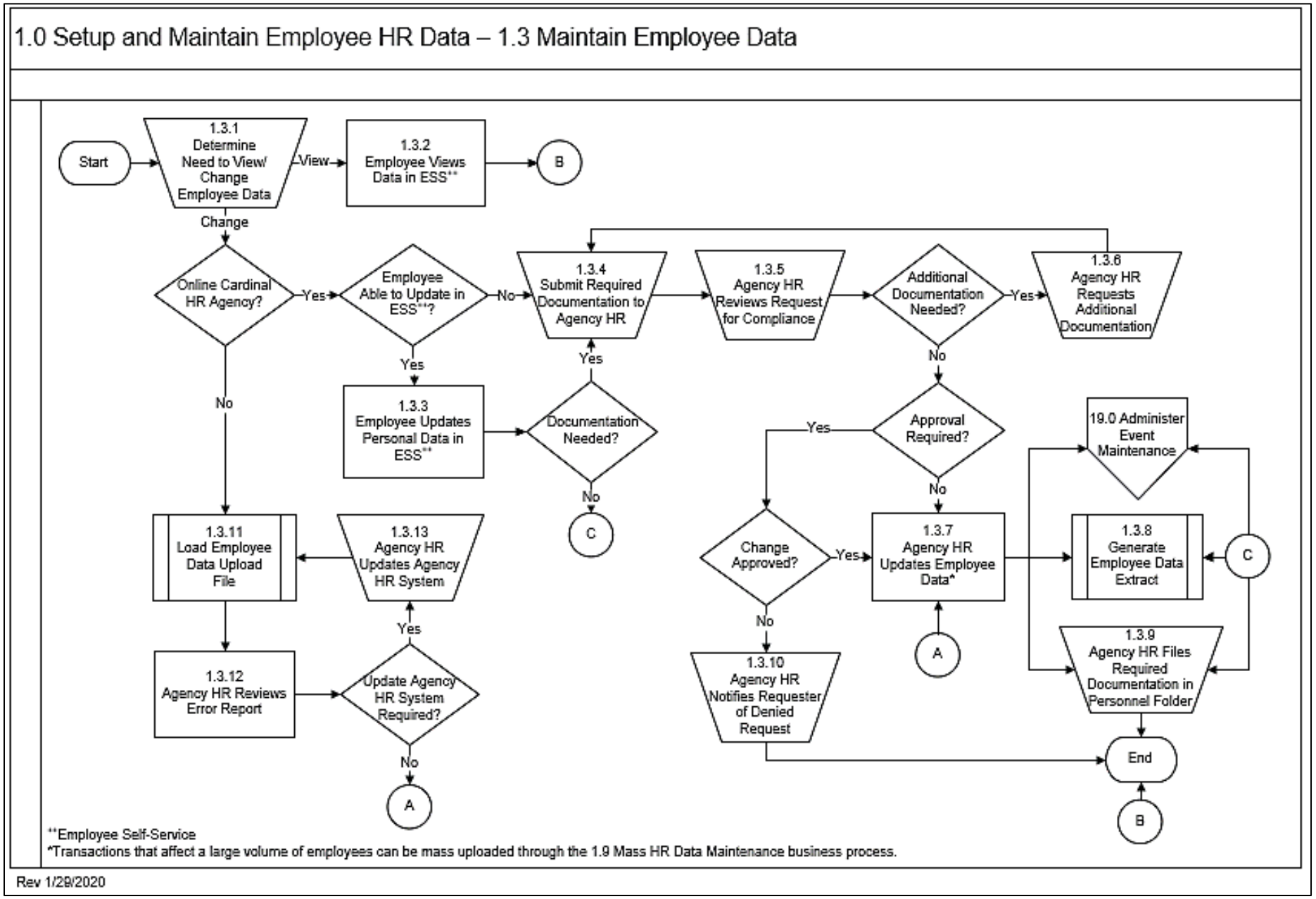
Creating and Maintaining Position Data



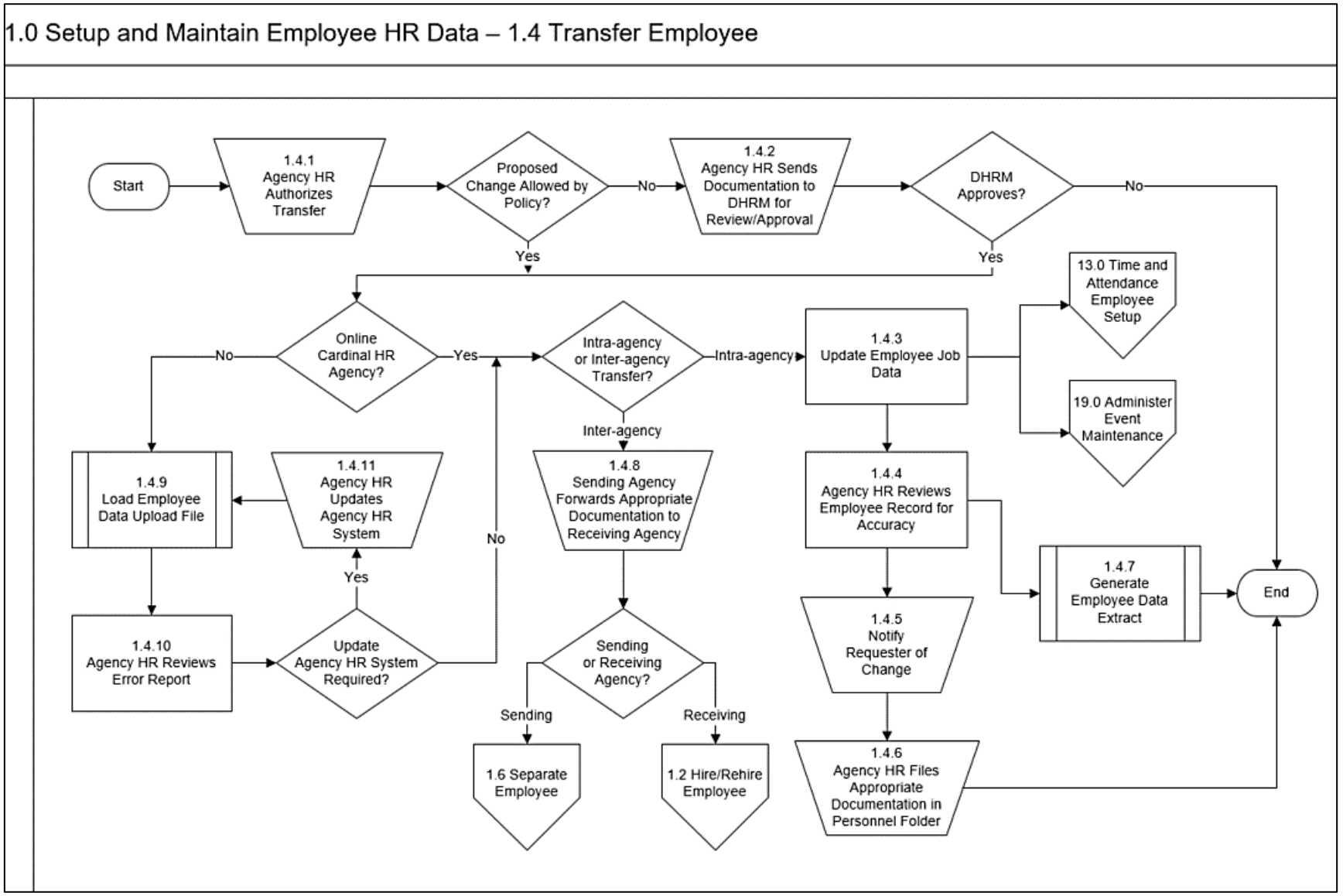
Hiring or Rehiring an Employee



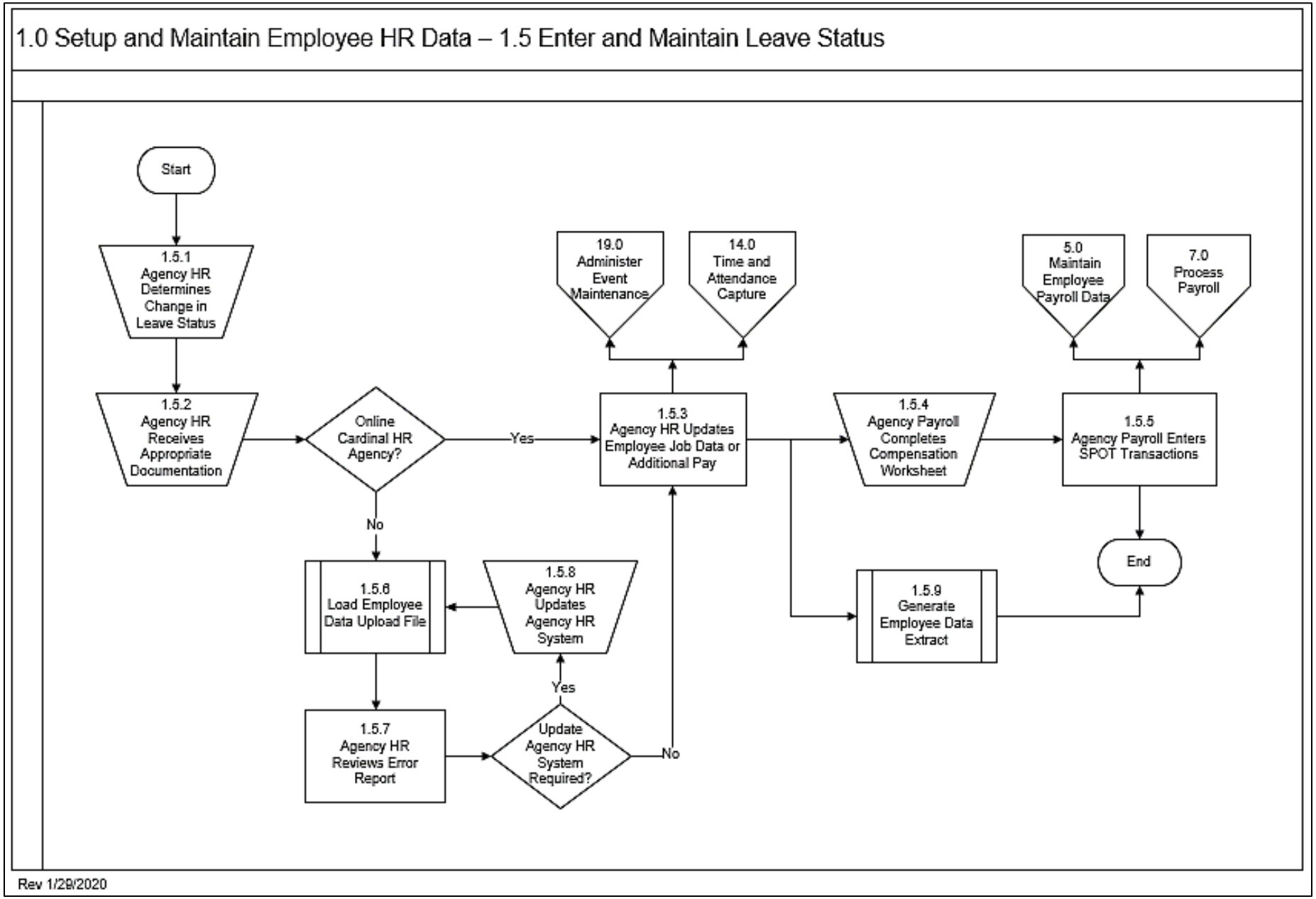
Maintaining Employee Data



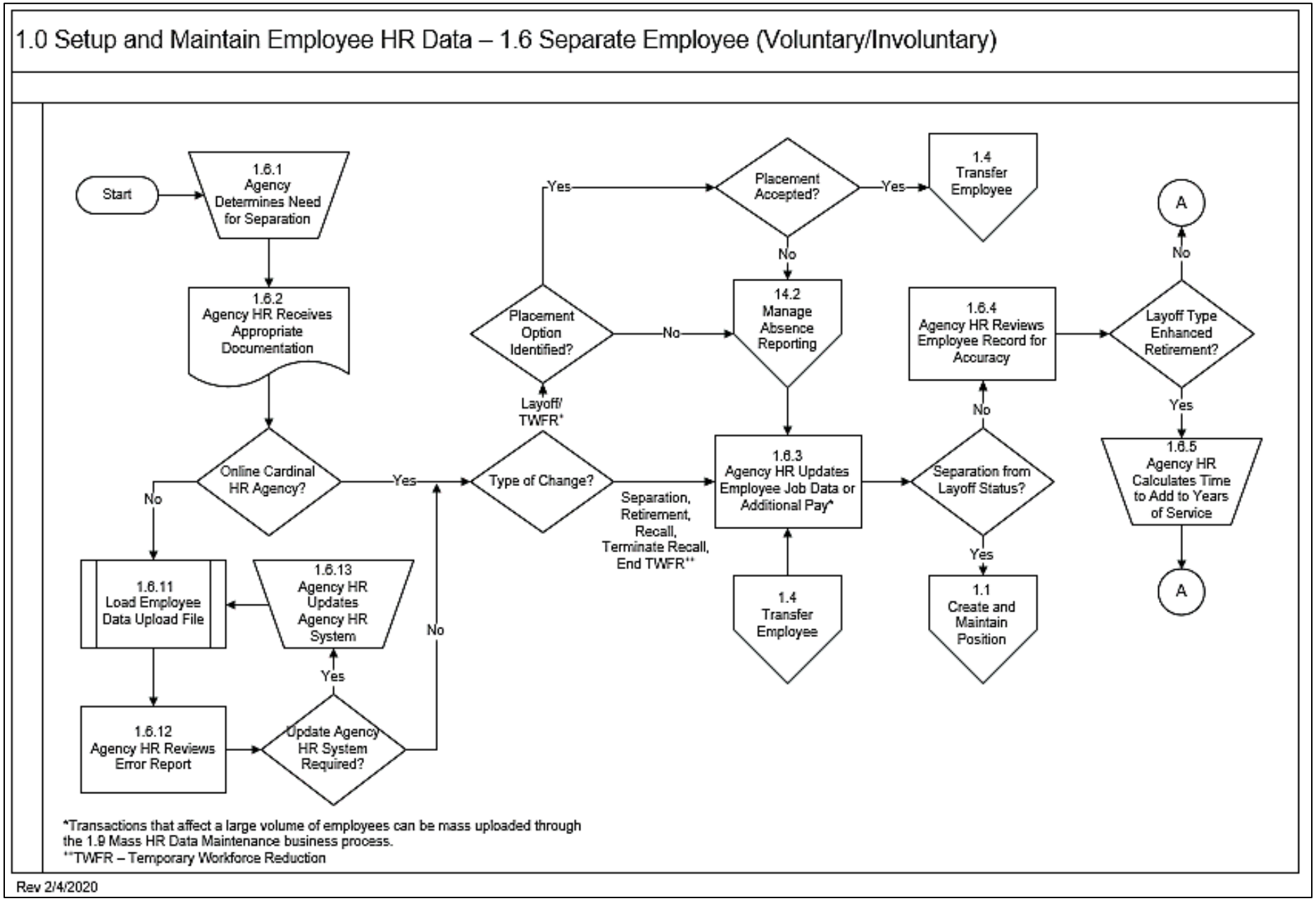
Employee Transfer



Maintain Leave Status

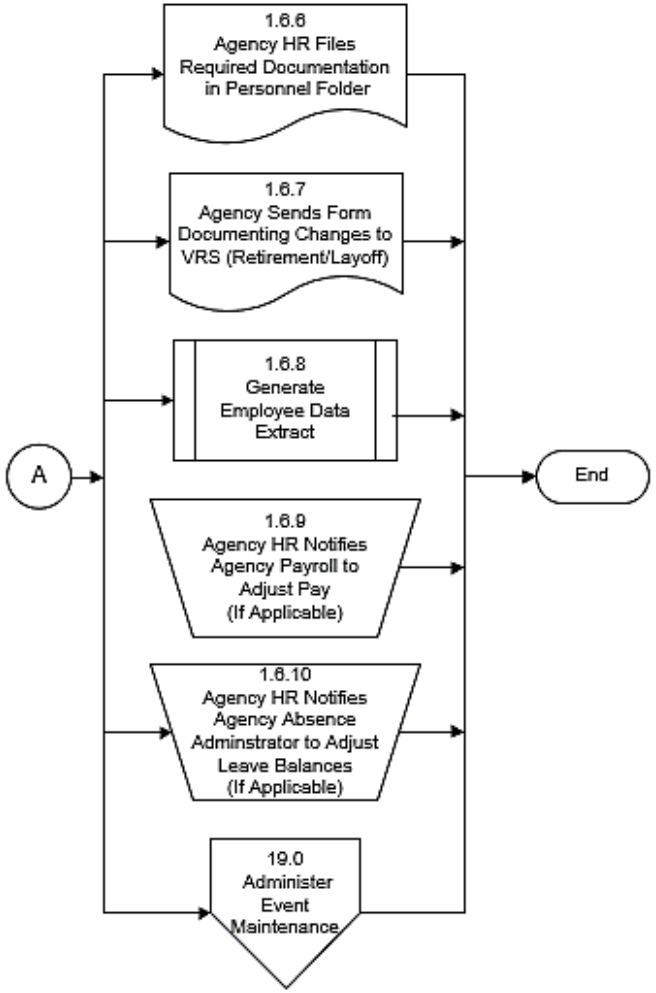


Separate Employee



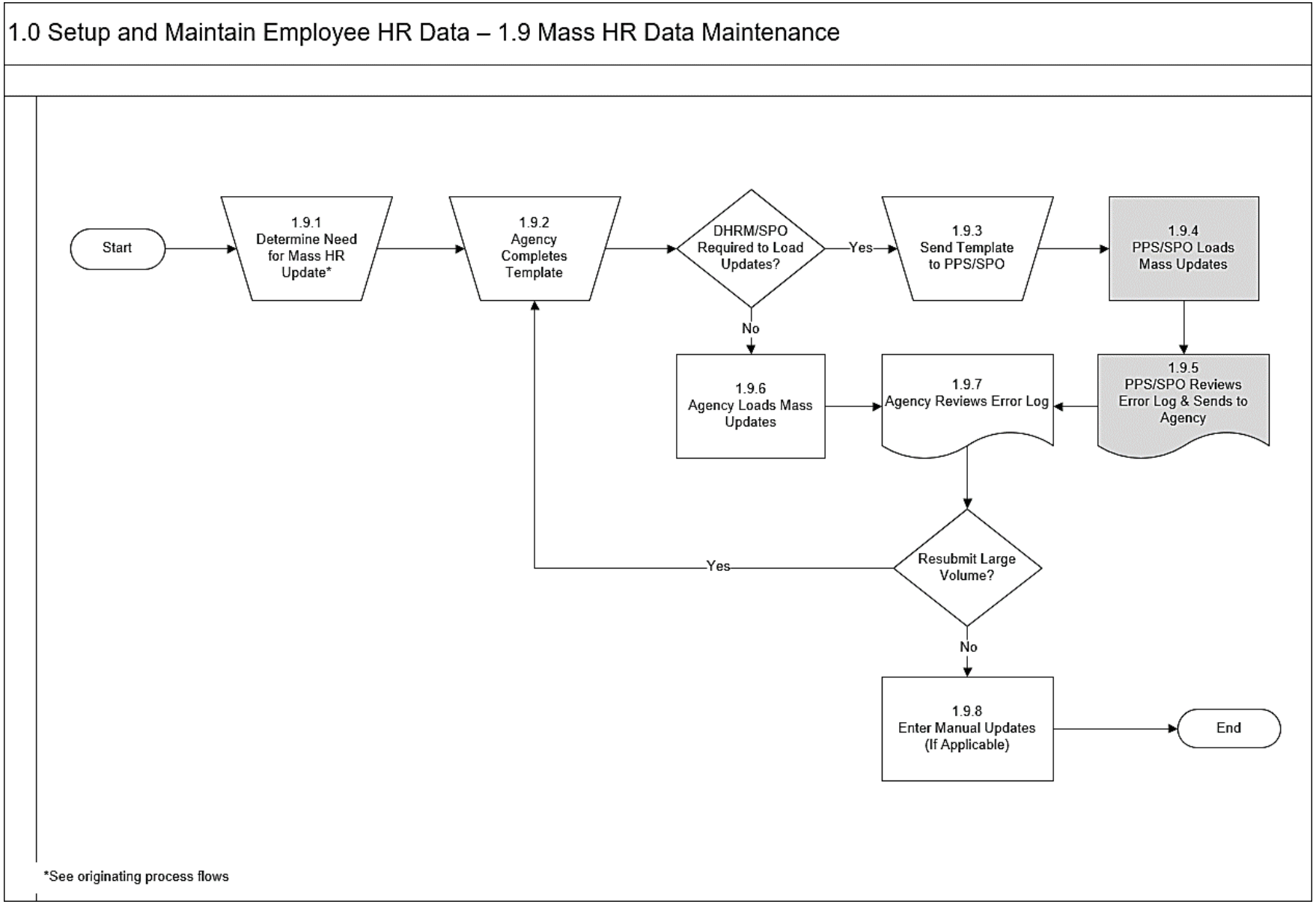
Separate Employee

1.0 Setup and Maintain Employee HR Data – 1.6 Separate Employee (Voluntary/Involuntary)

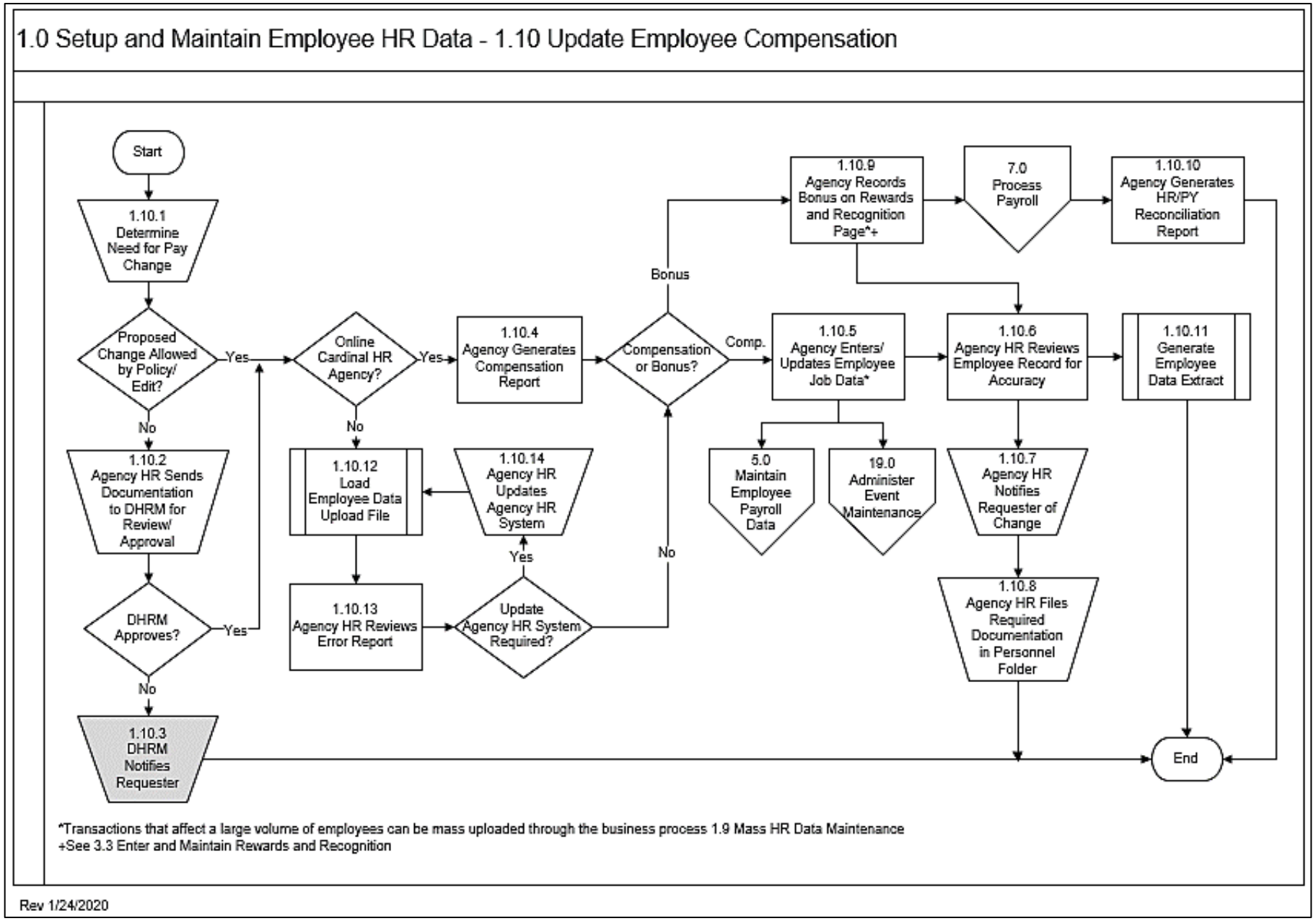


Rev 2/4/2020

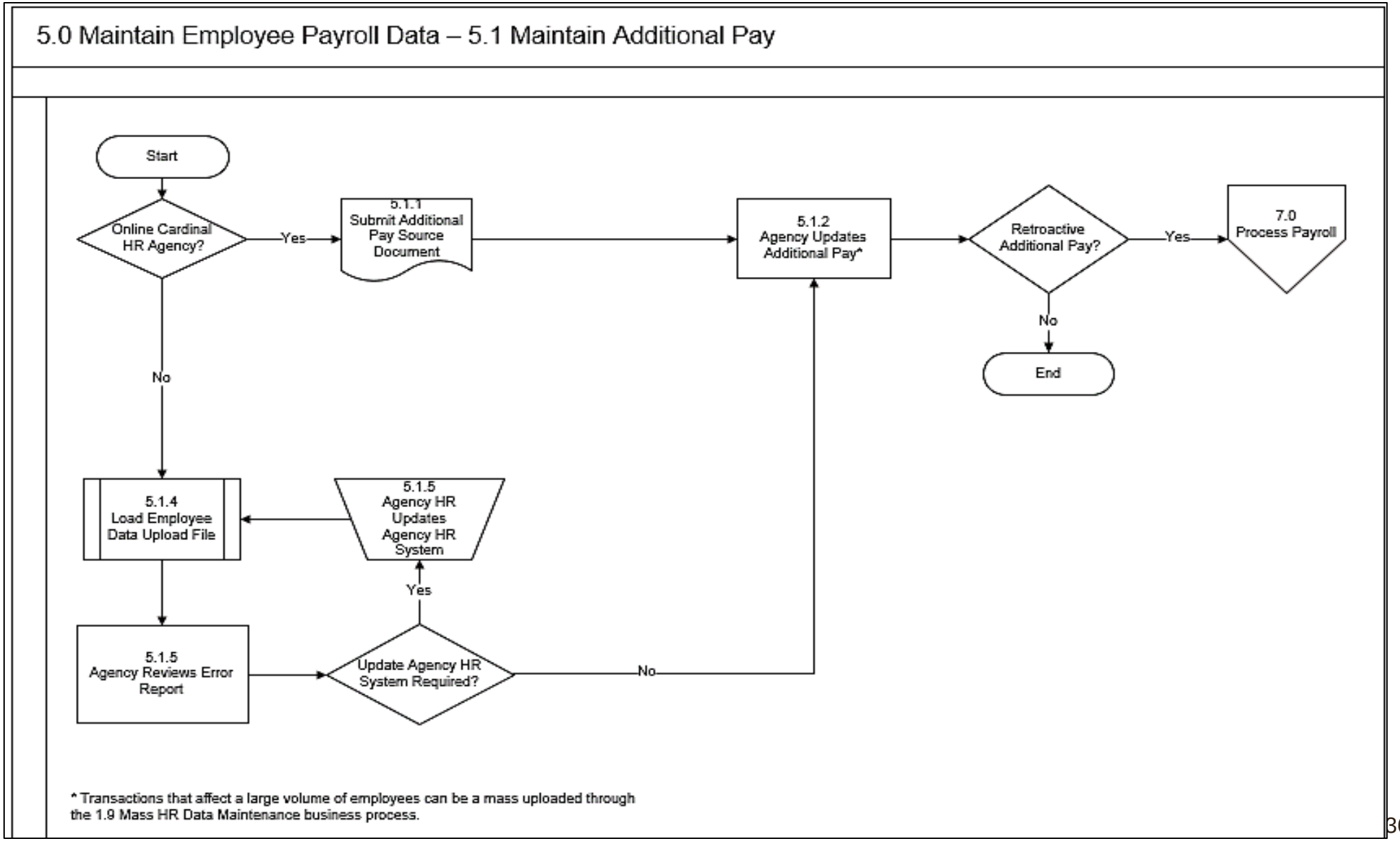
Mass HR Data Maintenance



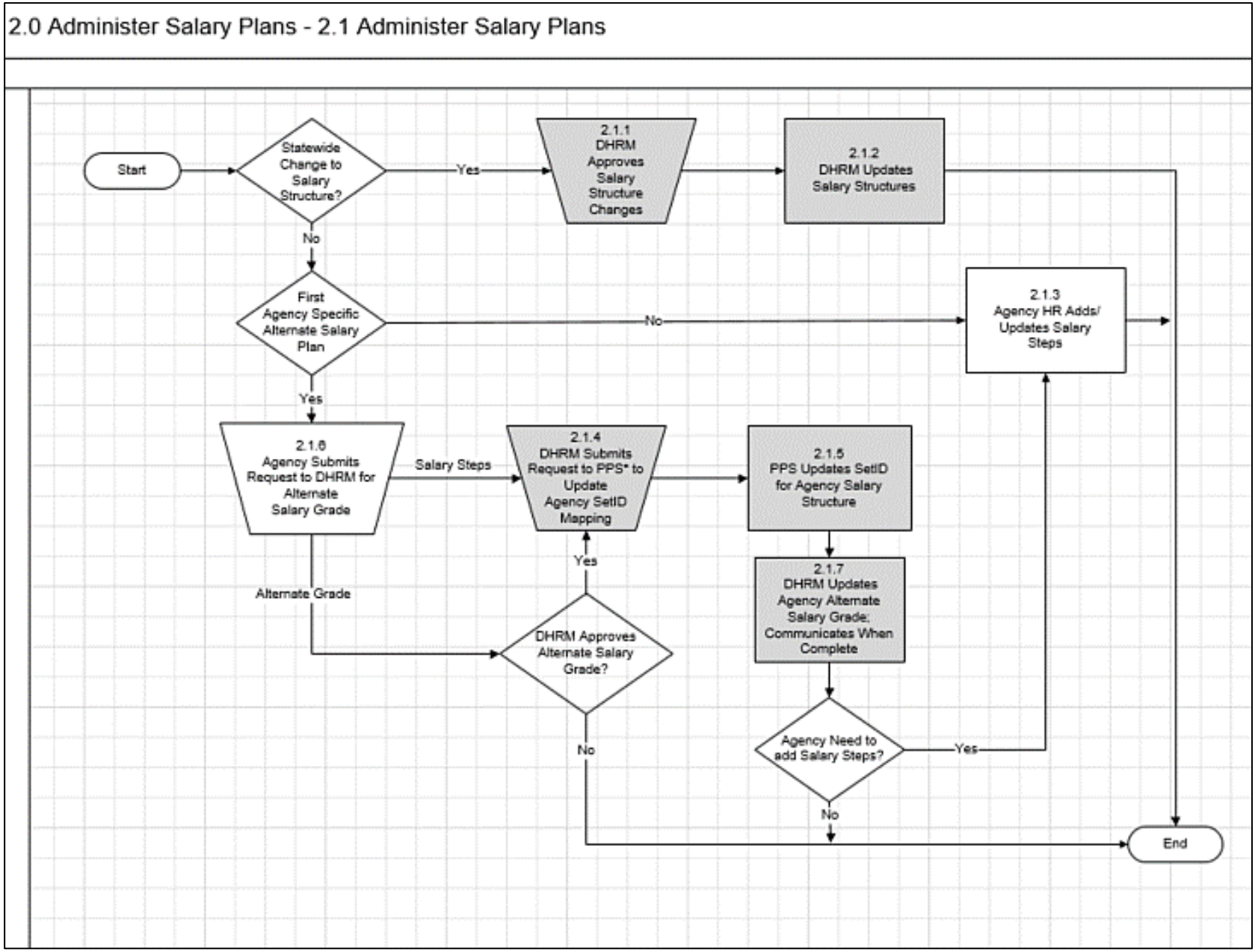
Updating Employee Compensation



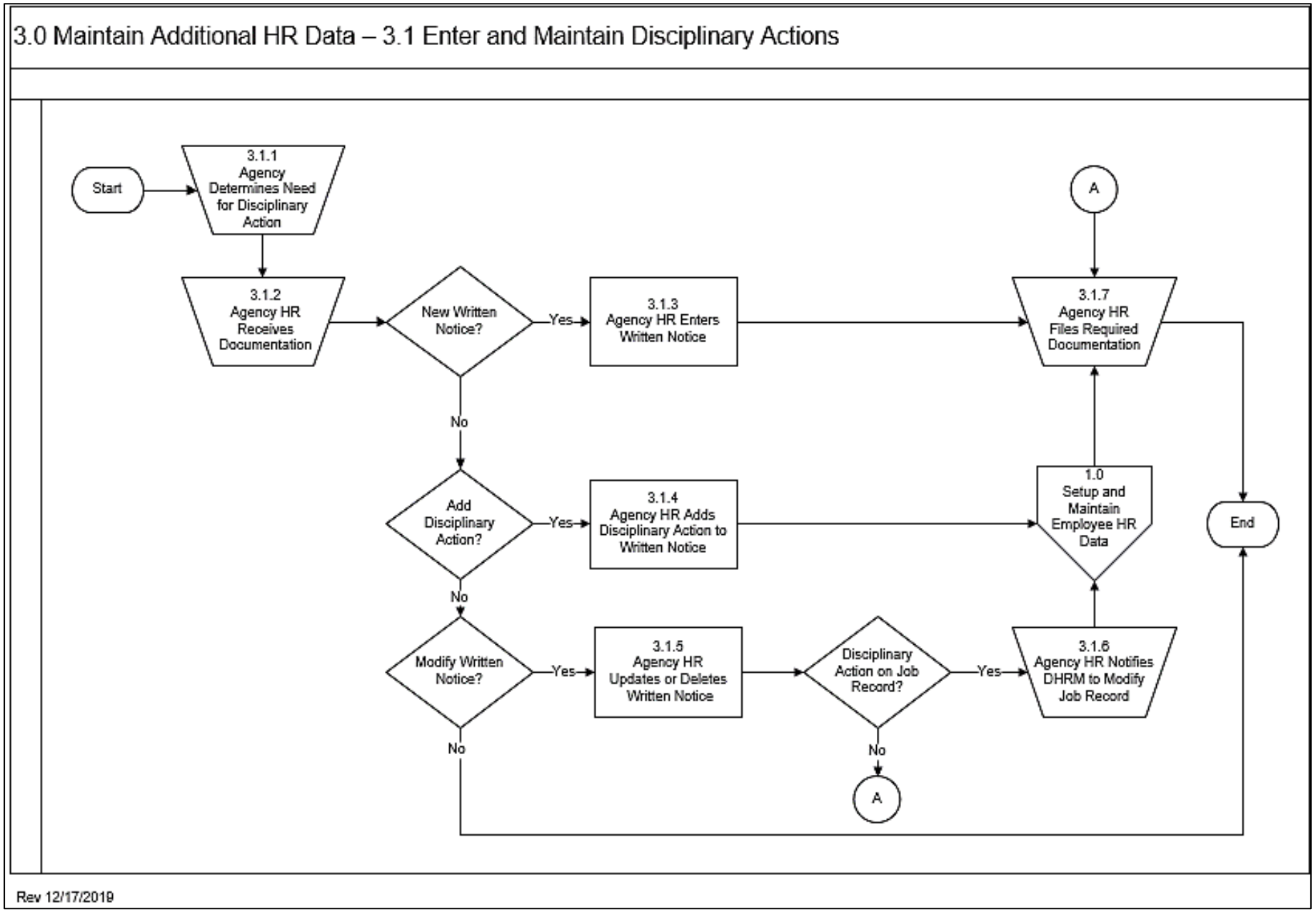
Maintaining Employee Additional Pay



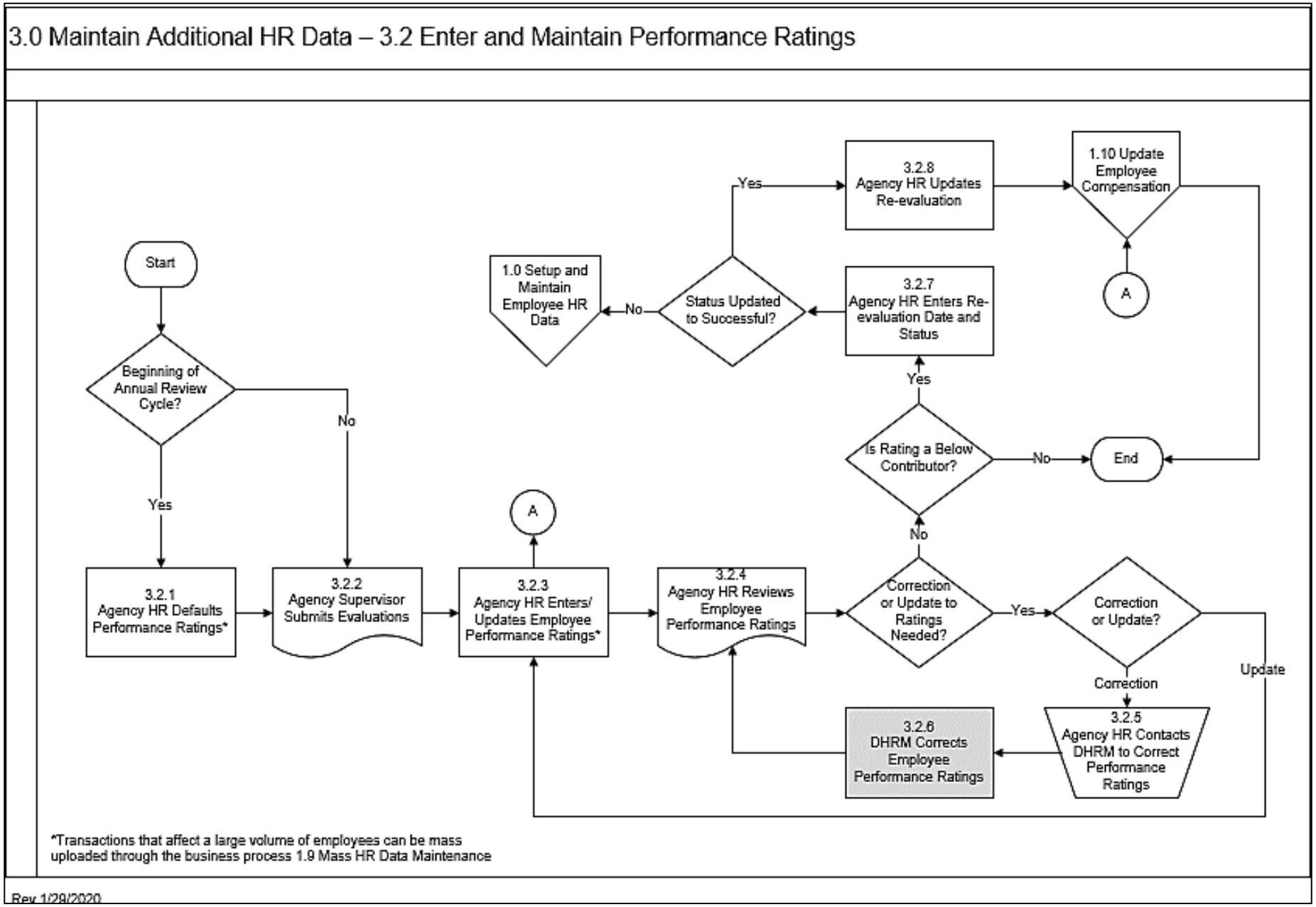
Administering Salary Plans/Grades/Steps



Entering and Maintaining Disciplinary Actions

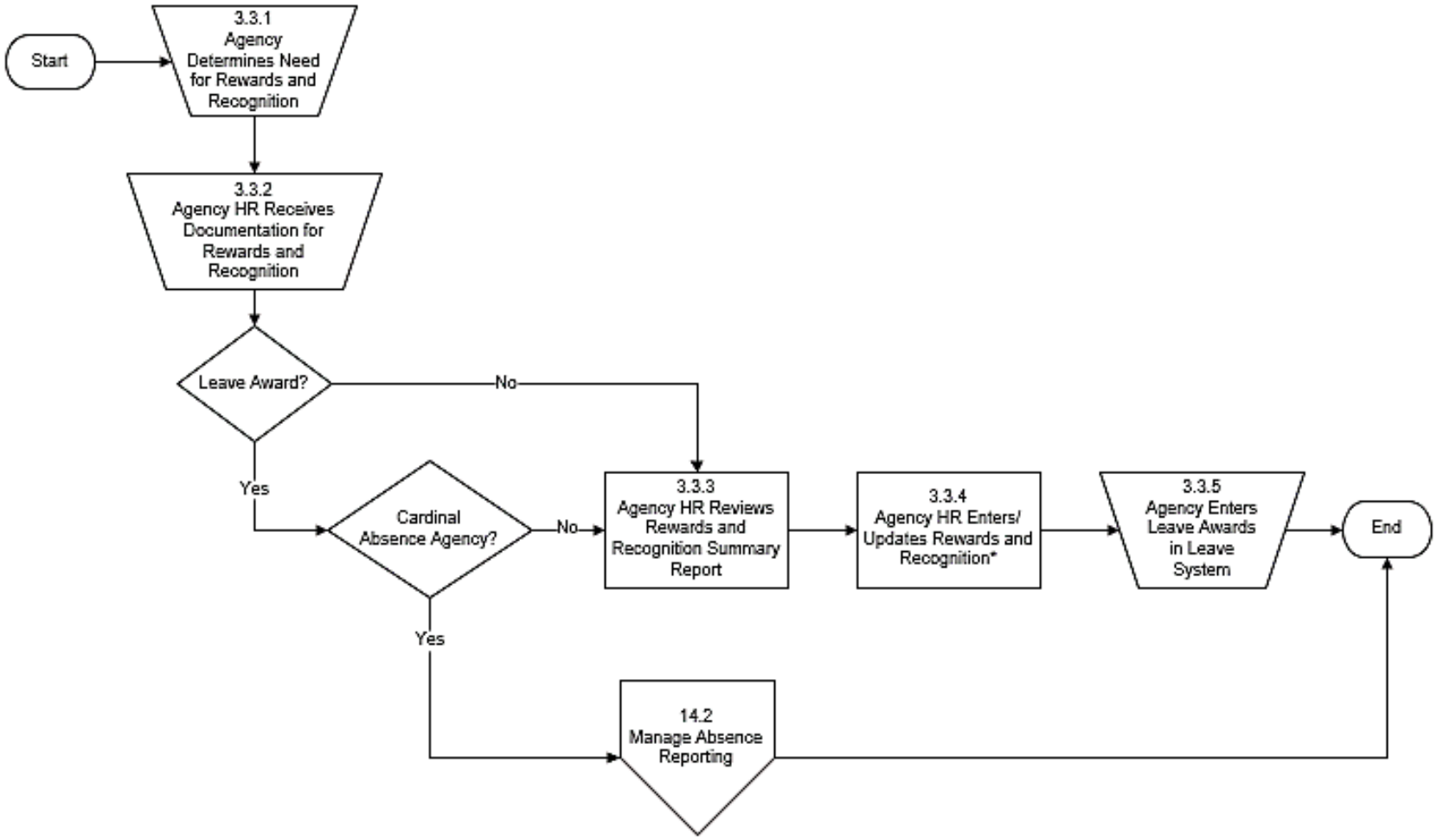


Entering and Maintaining Performance Rating



Entering and Maintaining Rewards and Recognition

3.0 Maintain Additional HR Data – 3.3 Enter and Maintain Rewards and Recognition



*Transactions that affect a large volume of employees can be mass uploaded through the business process 1.9 Mass HR Data Maintenance

Rev 1/24/2020

Cardinal HR Levels

The Cardinal HR Level drives the HR data that is required in Cardinal HCM.

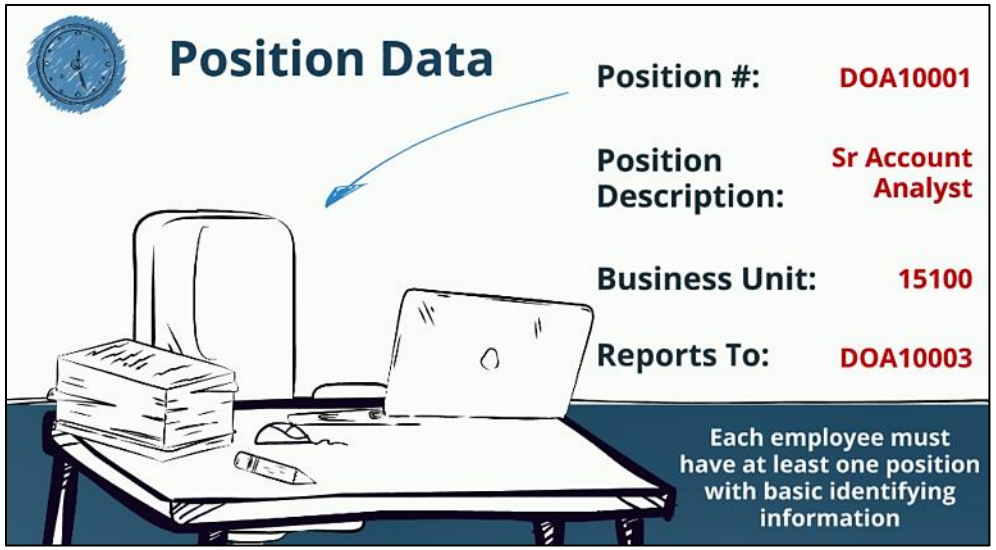
Cardinal HR Levels						
HR Level	**Position Data Required**	**Job Data Required**	**Salary/Rate Data Required**	**Performance Evaluation Data Required**	**Disciplinary Action Data Required**	**Rewards/ Recognition Data Required**
Level 1 – Full HR	Full	Full	Full	Yes	Yes	Yes
Level 2 – Medium HR	Full	Full	Full	No	No	No
Level 3 – Basic HR	Default/Dummy Position Information Only	Basic	No	No	No	No
Level 4 – Employee Position Report (EPR) Only	None	None	None	No	No	No

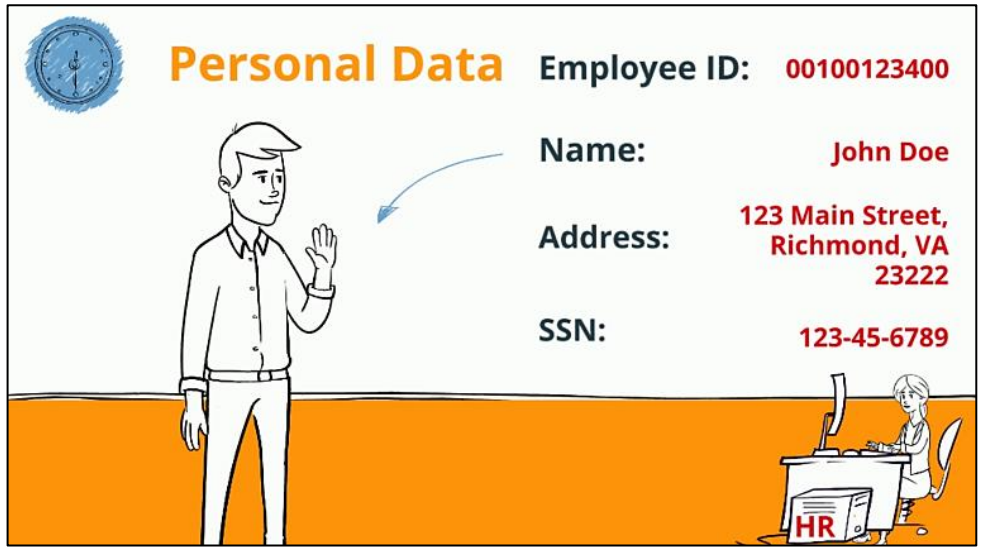
Note: Not all Agencies use all of the Cardinal HCM functional areas.

HR Data Relationships – Position, Personal, Job

Hiring or Rehiring an Employee (continued)

When the hire process is complete the entire employee record is added into Cardinal.





Hiring or Rehiring an Employee (continued)

Job Data impact on HCM functional areas

The updated Payroll Status allows a Paysheet to be created for payroll processing.

Payroll

The Action Reason for a salaried employee initiates the event that triggers the benefit enrollment process.

Benefits

Agencies using Cardinal Absence Management (AM) enrolls the employee into AM and selects the appropriate leave plan (e.g,Traditional, VSDP).

Time & Attendance

The active HR status automatically enrolls the employee in Time Reporter for agencies using Cardinal Time and Attendance (TA).

Separate Employee (continued)

<u>Navigation</u>: Navigator > Workforce Administration > Job Information > Job Data

Example of Notepad Functionality