

Overview of Effective Dating

Effective dating enables the ability to keep historical, current, and future-dated information and provides the ability to update existing information without losing or overwriting the data already in Cardinal.

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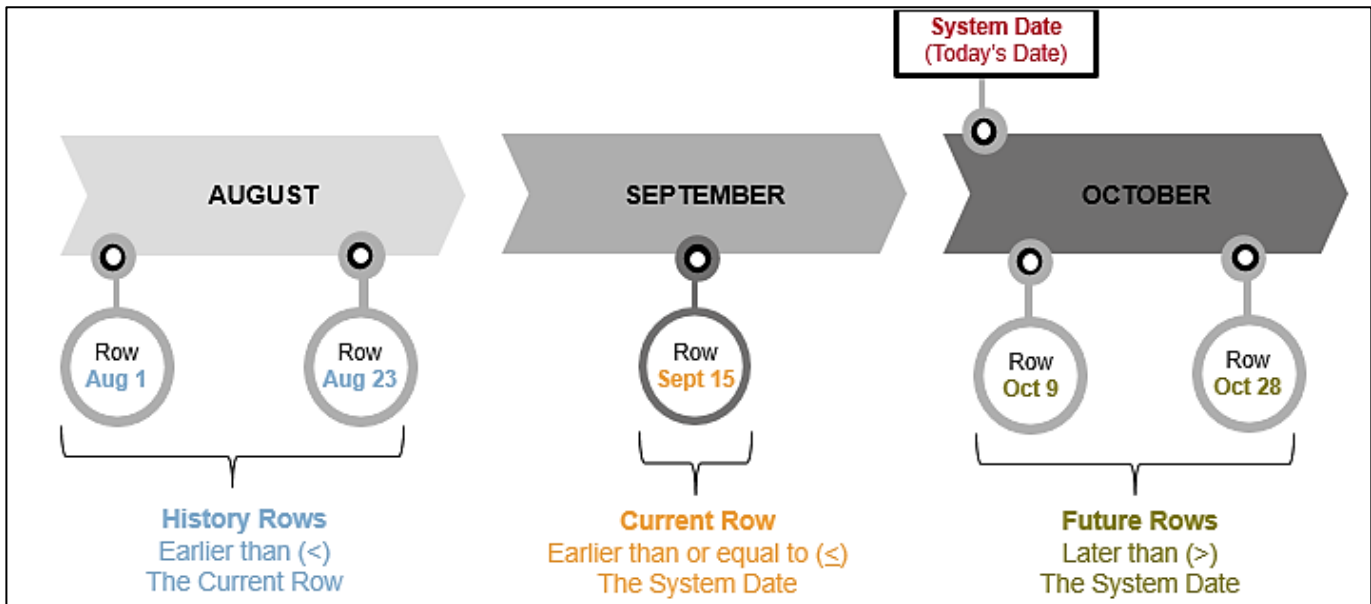
It is imperative to retain existing data in the database when entering new information related to existing data, (e.g., incumbent position transfer, pay rate change). To retain history, insert an effective date, which is a data row identified by a date that indicates when the new information goes into effect.

Effective dating provides the ability to store historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

The following table provides high-level overview information for each type of effective dating row:

Types of Effective Dated Rows	Criteria	Number of Rows Allowed	View Access	Update Access	Insert Access
History	Effective Date < Effective Date of the Current Row	Zero to Many	Yes	No	No
Current	Effective Date <= Today's Date	One	Yes	No	Yes
Future	Effective Date > Today's Date	Zero to Many	Yes	Yes	Yes

The following diagram displays an example of history, current, and future effective dates:

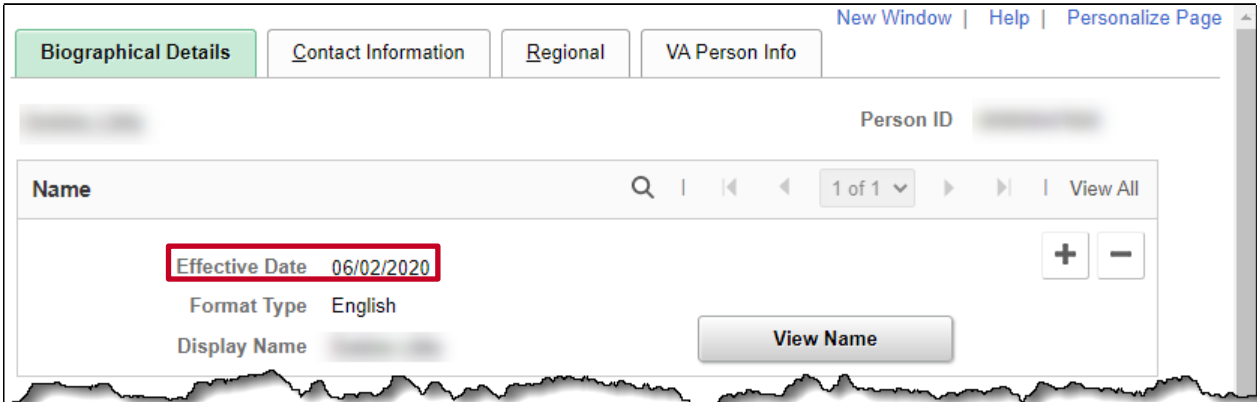


Tips: Multiple actions with the same effective date on the employee's job record are handled by using the effective sequence field found on the **Work Location** tab on the **Job Data** page to differentiate actions with the same effective date. The record row with the lowest number becomes a historical row of data when a new sequence is added.

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Example of how the Personal Record and the Job Record Effective Dates impact each other:

The effective date of the hire on the Job Record cannot occur earlier than the effective date on the Personal Data Record.



Biographical Details | Contact Information | Regional | VA Person Info

Person ID [REDACTED]

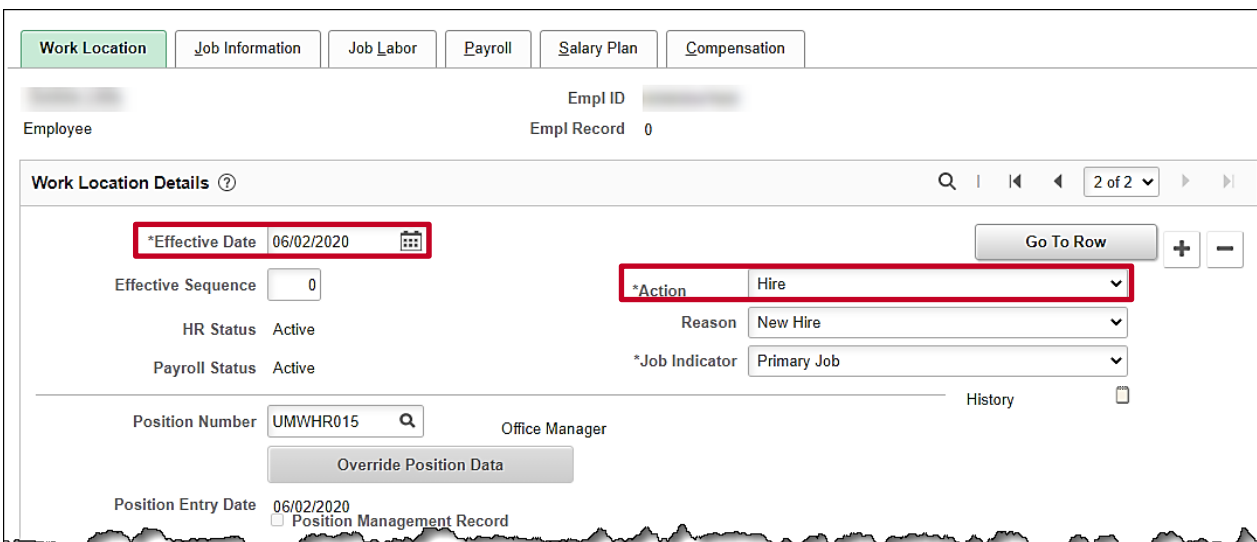
Name [REDACTED] 1 of 1 | View All

Effective Date 06/02/2020

Format Type English

Display Name [REDACTED] View Name

Note: In this example, the Personal Data Effective Date is 06/02/2020.



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

Empl ID [REDACTED]

Employee Empl Record 0

Work Location Details 2 of 2

***Effective Date 06/02/2020**

Effective Sequence 0

HR Status Active

Payroll Status Active

***Action Hire**

Reason New Hire

*Job Indicator Primary Job


Position Number UMWHR015 Office Manager

Override Position Data

Position Entry Date 06/02/2020

Position Management Record

Note: In this example, the Job Record Effective Date of Hire is 6/02/2020. The Job Record Effective Date must occur on or later than the date of the Personal Data Effective Date.



Work Location Details 1 of 2

***Effective Date 12/02/2020**

Effective Sequence 0

HR Status Active

Payroll Status Active

***Action Pay Rate Change**

Reason Competitive Salary Offer

*Job Indicator Secondary Job

Job History

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Note: The effective date of any Job Record modifications must occur on or later than the effective date of the current Job Record Effective Date. Contact DHRM if there is a requirement to insert a transaction prior to the current Job Record Effective Date.

Example of how the Position and Job Record Effective Dates impact each other:

Position Number DOA00008		Review Date	
Headcount Status Filled		Position Months 12.00	
Current Head Count 1 of 1		Stmnt of Economic Interest Reqd No	
Effective Date 01/01/1901	Effective Sequence 0	VPA Covered No	
Reason NEW New Position			
Approval Status Approved			

Note: The Position Effective Date is 01/01/1901.

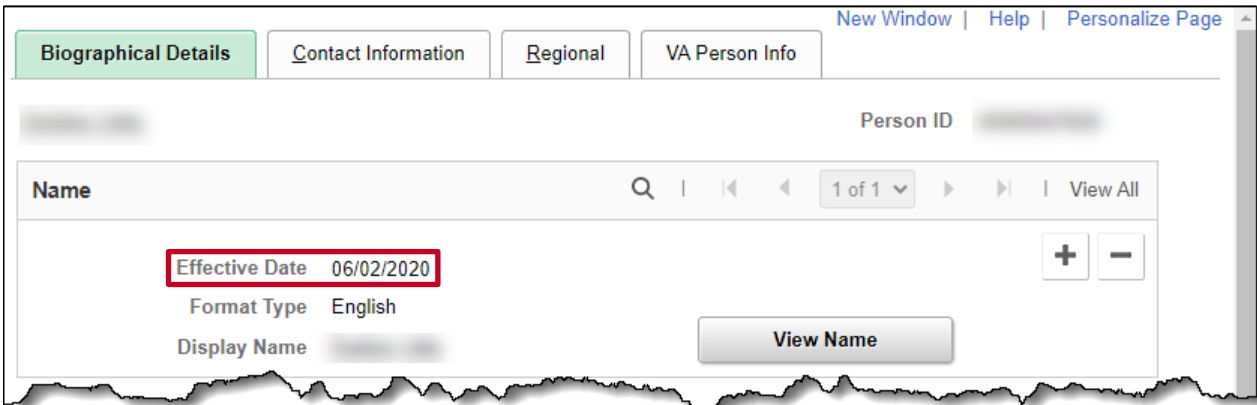
Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation																								
Employee		Empl ID																											
Empl Record 0																													
Work Location Details ?																													
<table border="0"> <tr> <td>*Effective Date 11/09/2019</td> <td>Go To Row</td> <td>+</td> <td>-</td> </tr> <tr> <td>Effective Sequence 0</td> <td>*Action Data Change</td> <td colspan="2"></td> </tr> <tr> <td>HR Status Active</td> <td>Reason Conversion</td> <td colspan="2"></td> </tr> <tr> <td>Payroll Status Active</td> <td>*Job Indicator Primary Job</td> <td colspan="2"></td> </tr> <tr> <td>Position Number DOA00008</td> <td>Accountant</td> <td colspan="2">Current</td> </tr> <tr> <td colspan="4">Override Position Data</td> </tr> </table>						*Effective Date 11/09/2019	Go To Row	+	-	Effective Sequence 0	*Action Data Change			HR Status Active	Reason Conversion			Payroll Status Active	*Job Indicator Primary Job			Position Number DOA00008	Accountant	Current		Override Position Data			
*Effective Date 11/09/2019	Go To Row	+	-																										
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HR Status Active	Reason Conversion																												
Payroll Status Active	*Job Indicator Primary Job																												
Position Number DOA00008	Accountant	Current																											
Override Position Data																													

Note: The incumbent employee's Job Data Effective Date must be on or later than the Position Effective Date.

HR351_ Overview of Effective Dating**Example of how the Personal, Job, and Benefit Record Effective Dates impact each other:**

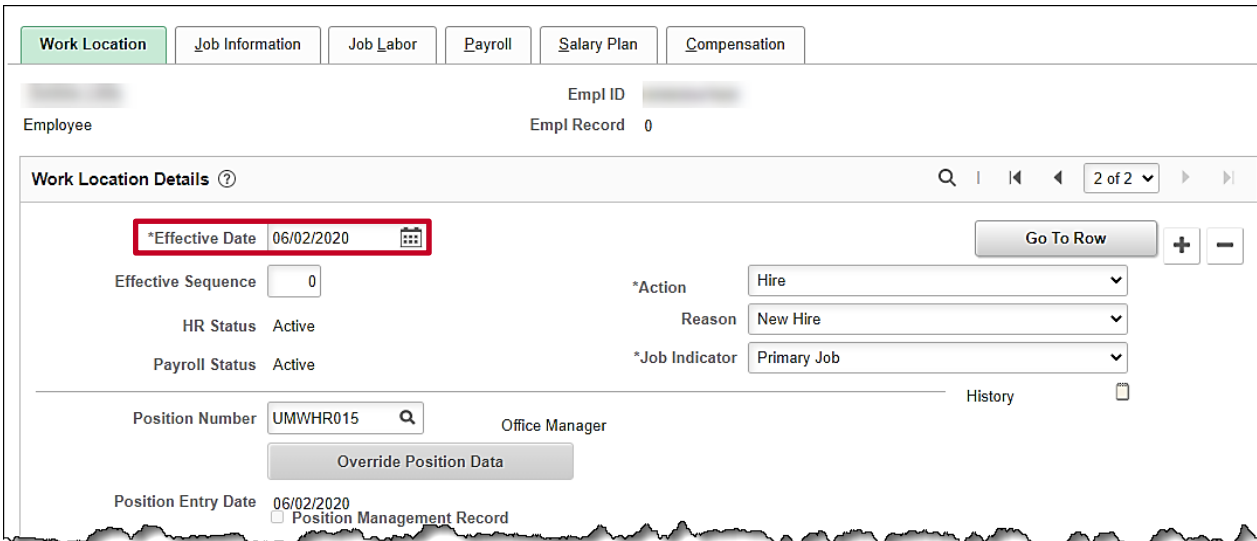
The current active row on the effective dated tables is the row with the most recent effective date less than or equal to the current date.

- Agencies must submit a help desk ticket to the Cardinal Post Production Support (PPS) team to update current rows and history rows.
- Agencies can enter new rows with effective dates greater than the most current row, including future-dated rows.



The screenshot shows a web interface with tabs for Biographical Details, Contact Information, Regional, and VA Person Info. The 'Biographical Details' tab is active. Below the tabs, there is a search bar for 'Name' and a 'Person ID' field. A table with one row is displayed, where the 'Effective Date' field is highlighted with a red box and contains the value '06/02/2020'. Other fields in the row include 'Format Type' (English) and 'Display Name'. A 'View Name' button is located to the right of the row.

Note: In this example, the Personal Data Effective Date is 06/02/2020.



The screenshot shows a web interface with tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The 'Work Location' tab is active. Below the tabs, there is a search bar for 'Employee' and an 'Empl ID' field. A table with one row is displayed, where the '*Effective Date' field is highlighted with a red box and contains the value '06/02/2020'. Other fields in the row include 'Effective Sequence' (0), 'HR Status' (Active), 'Payroll Status' (Active), '*Action' (Hire), 'Reason' (New Hire), and '*Job Indicator' (Primary Job). A 'Go To Row' button is located to the right of the row. Below the table, there is a 'Position Number' field (UMWHR015) and an 'Override Position Data' button. The 'Position Entry Date' is 06/02/2020, and there is a checkbox for 'Position Management Record'.

Note: In this example, the Job Record Effective Date of Hire is 6/02/2020. The Job Record Effective Date must occur on or later than the date of the Personal Data information.

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The screenshot shows a web interface for 'Benefit Program Participation Details'. At the top, there is a search bar and navigation controls. Below this, the main content area displays the following information:

*Effective Date	06/02/2020	Currency Code	USD
*Benefit Program	WGE	Wage Employee No Benefits	

The 'Effective Date' field is highlighted with a red rectangular box. There are also '+' and '-' buttons to the right of the date field.

Note: In this example, the Benefit Program Participation Effective Date is 06/02/2020. The Benefit Program Participation Effective Date must occur on or later than the Job Record Effective Date of Hire.