



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) 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

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Overview of Cardinal HCM

2

Human Resources Data Types

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Managing Position Data

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Managing Employee Personal Data

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Managing Employee Job Data

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Managing Job Data Updates



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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).

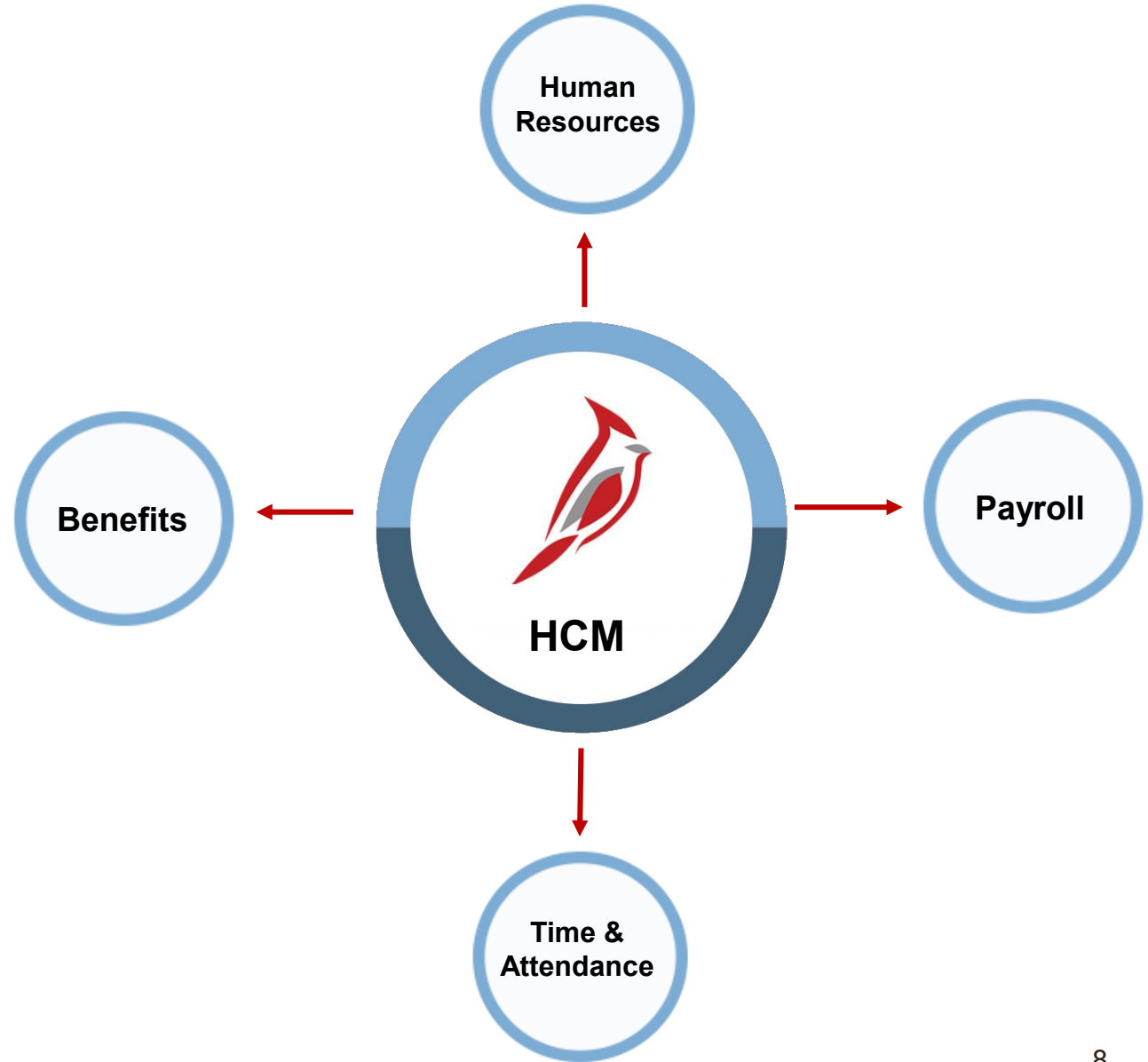




Cardinal Human Capital Management (HCM)

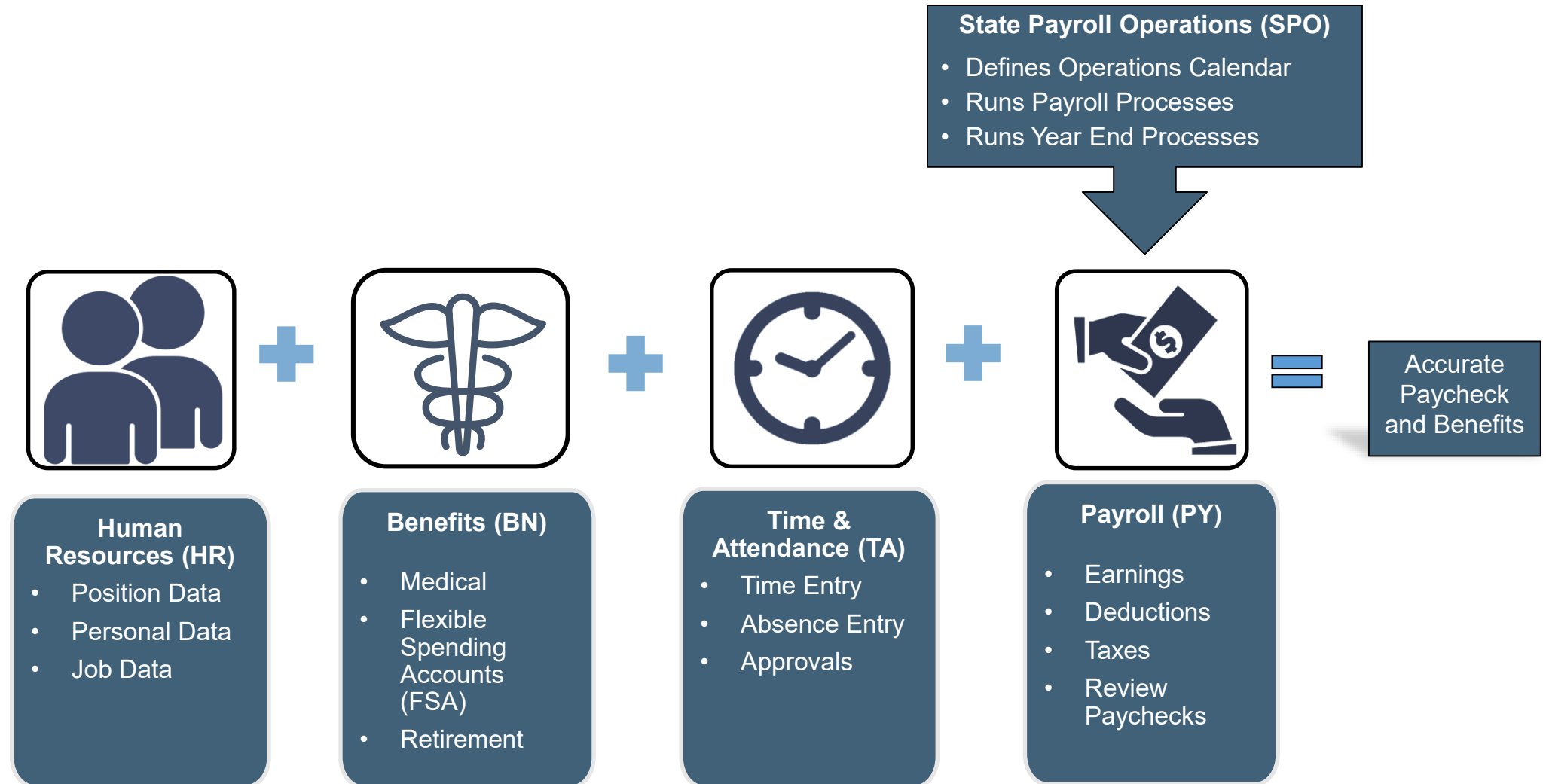
In Cardinal HCM, HR Administrators, BN Administrators, TL Administrators, Payroll Administrators, and State Payroll Operations (SPO) work together so that all employees are paid on time and accurately and are benefited properly.

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

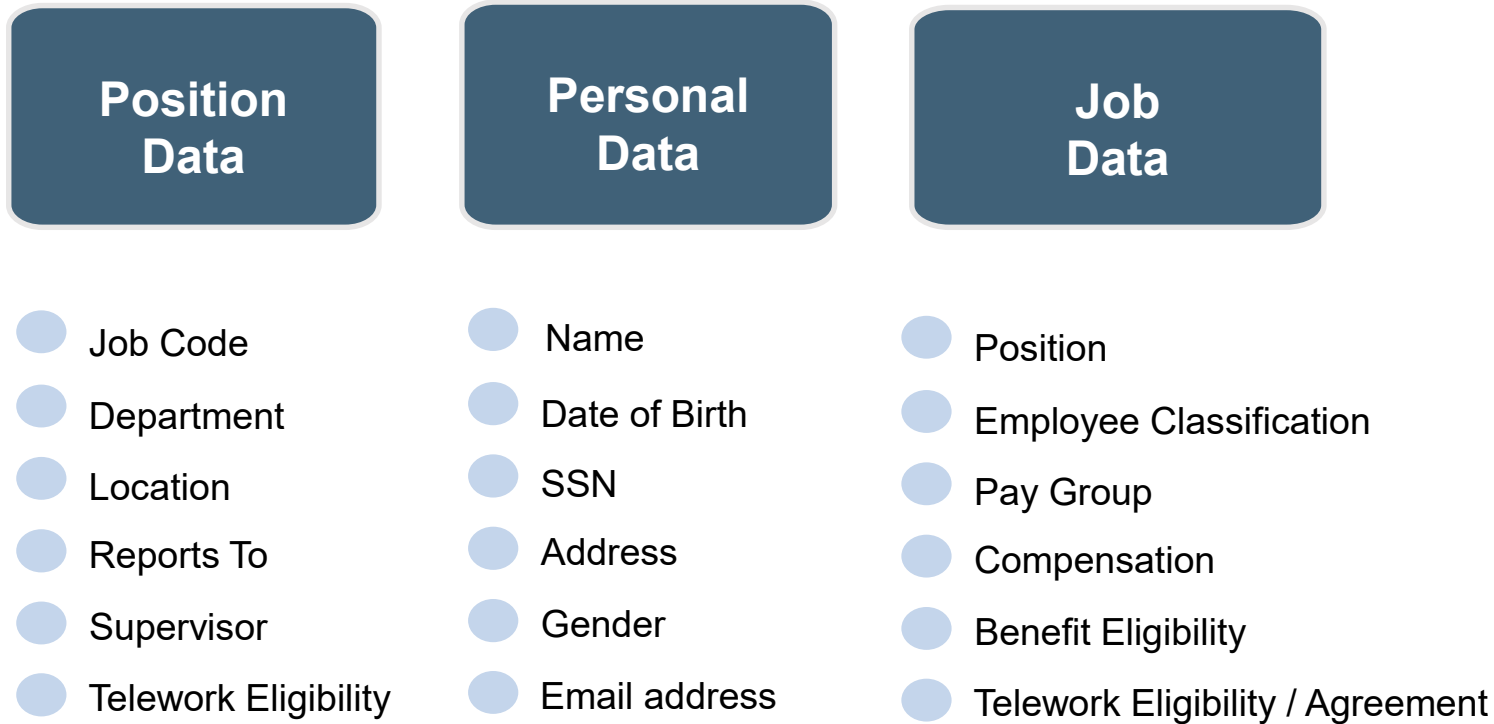




Overview of the Human Resources Functionality

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.

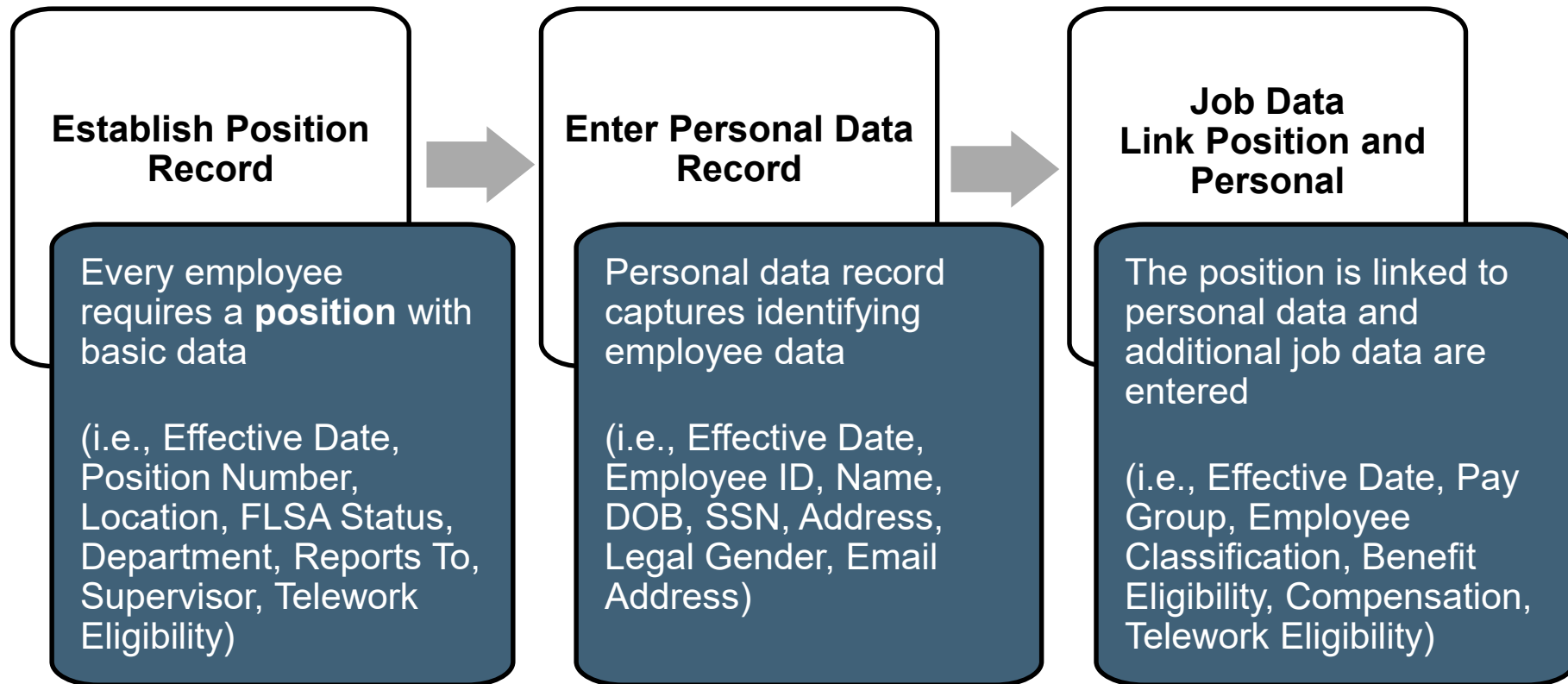
HR consists of three main data types:





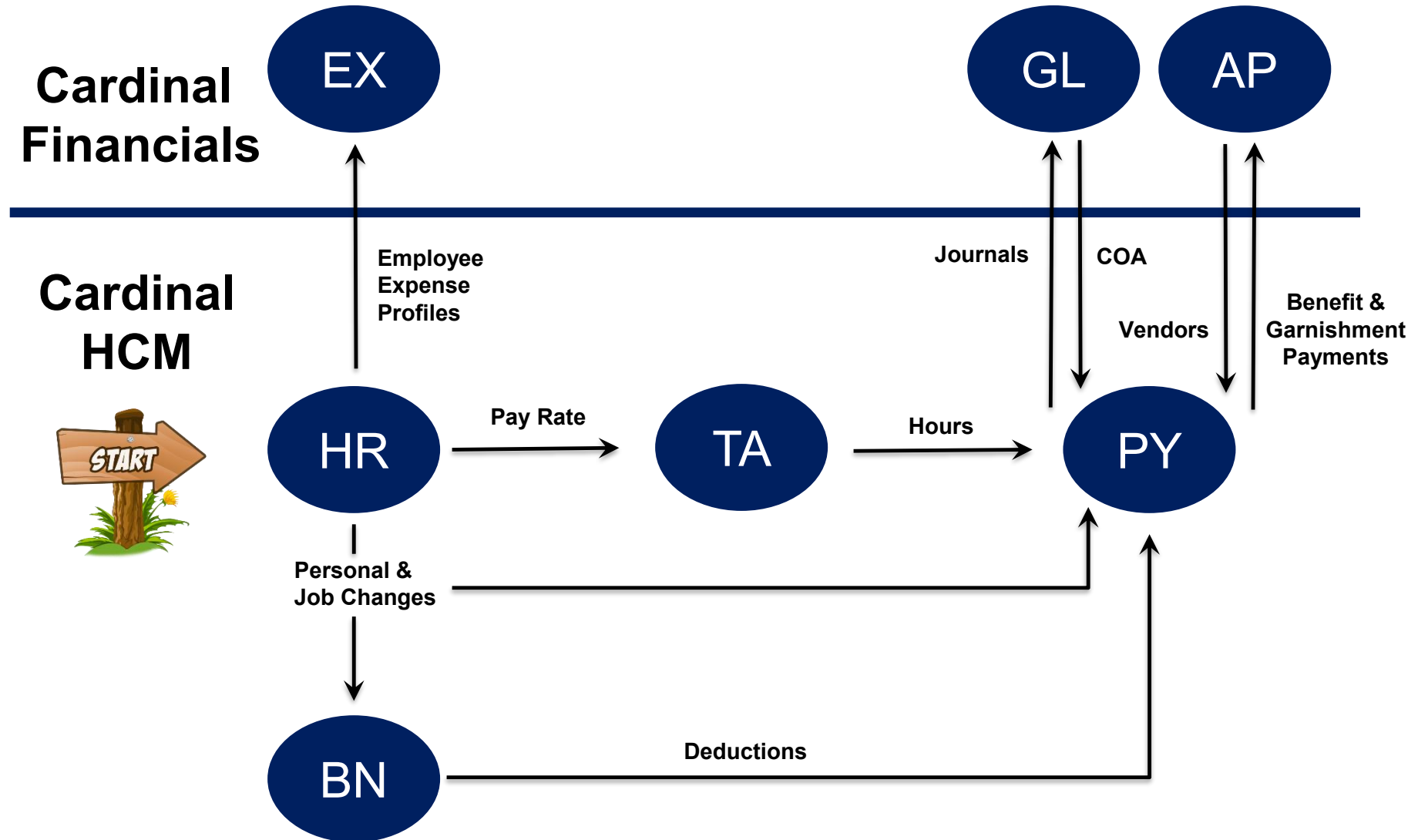
Order of Entry for Human Resource Data

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)

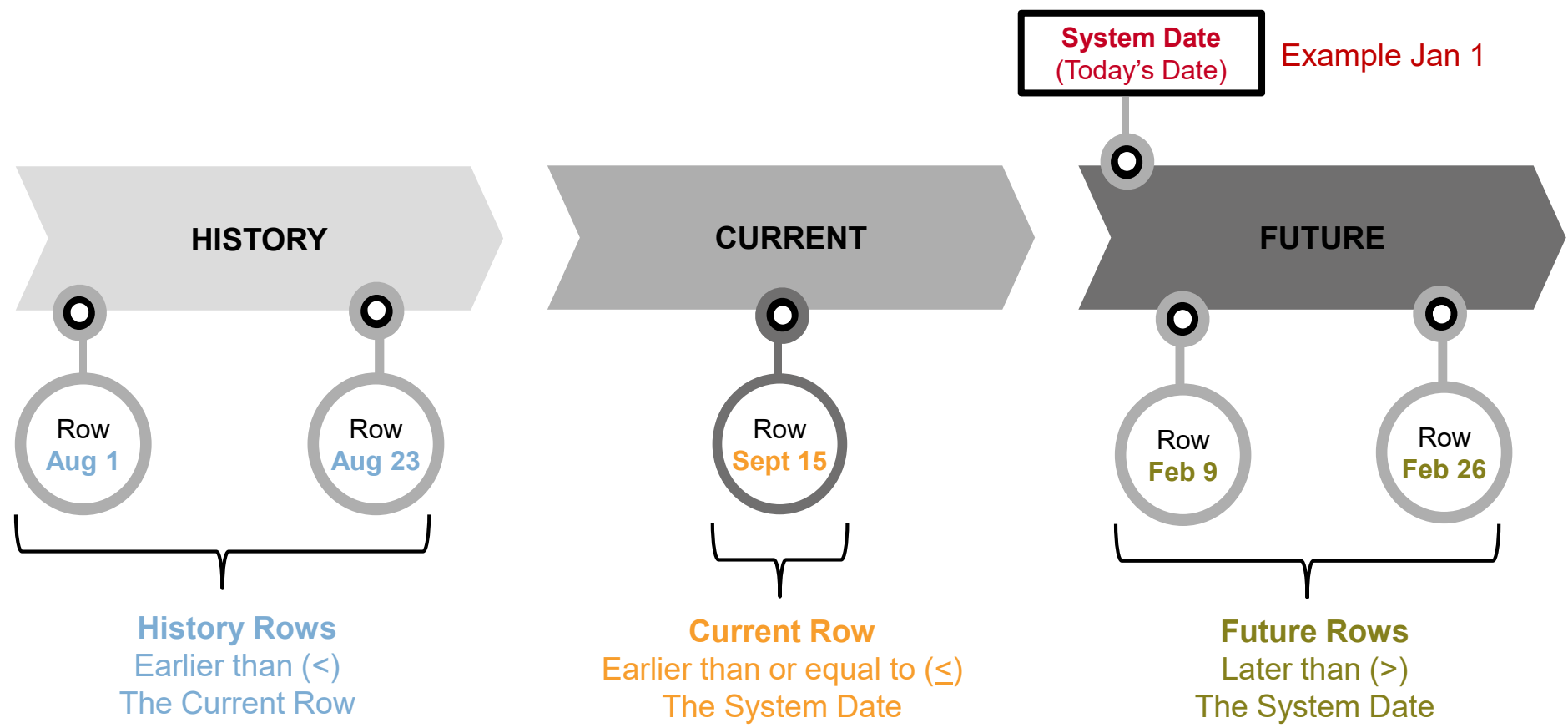
HCM: Human Resources (HR), Benefits Administration (BN), Time & Attendance (TA), Payroll (PY)



Cardinal Effective Dating

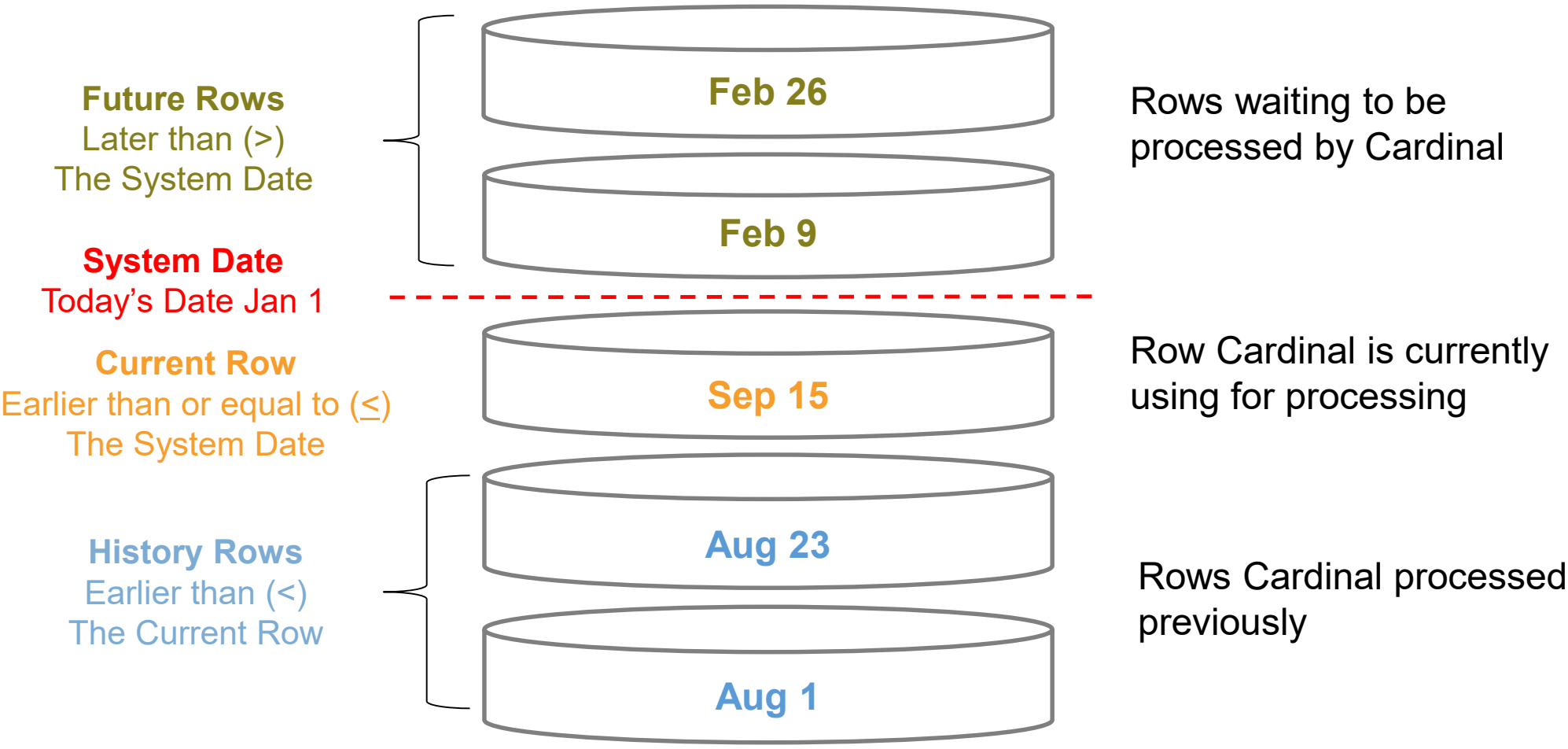
Effective dating provides the ability to keep historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal. To retain history, insert a data row identified by a date that indicates when the new information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



Demonstration

In this demonstration, the instructor will demonstrate the following:

- Viewing an employee's record with effective dated rows



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 Checkpoint

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



1. True or False. HR data can only be entered into Cardinal via the online method.



2. Human Resources functional area consists of how many main data types?

- A. 3
- B. 2
- C. 1



3. True or False. The HR Administrator is the only Cardinal role that can insert a row in between two rows in Job Data.



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

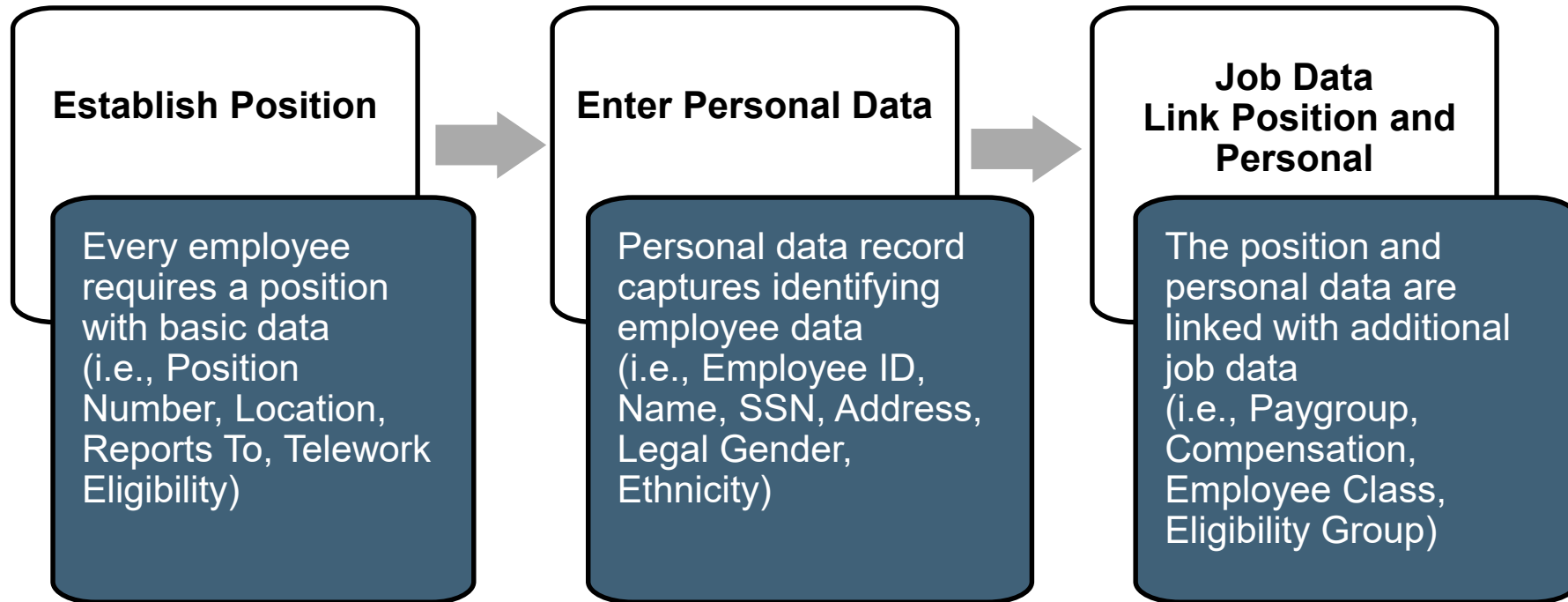


HR Data Relationships



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



Lesson Checkpoint

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



1. What information is added when creating a new position? (Select all that apply)
 - A. Department
 - B. Telework Eligibility
 - C. Telework Days
 - D. Supervisor



2. True or False. The Supervisor field on the position determines timesheet approval routing.



3. What items are needed to complete entry of personal data? (Select all that apply)
 - A. Effective Date
 - B. Name
 - C. Date of Birth
 - D. SSN
 - E. Legal Gender
 - F. Email Address



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

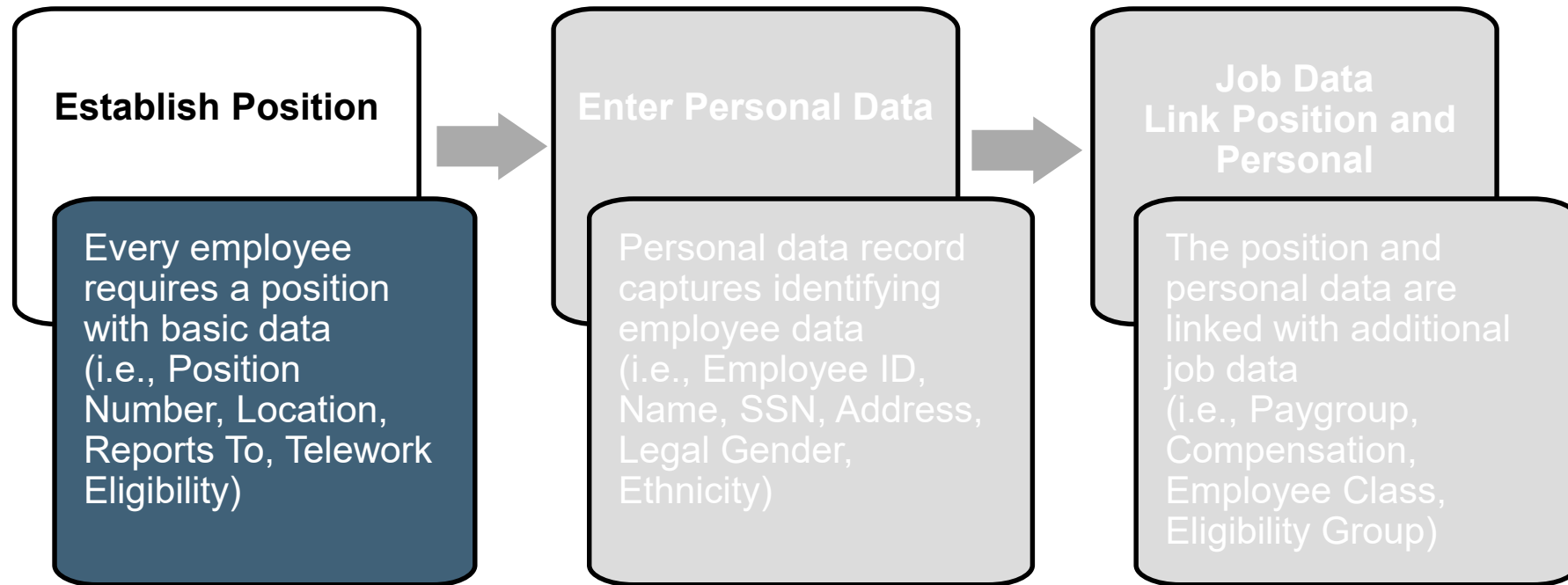
Managing Positions Data

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**.

Position Number	CJS00123
Headcount Status	Filled
Current Head Count	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

+ Add

100 rows

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	19216	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.

Cancel

Create Position

Continue

*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 >

1 Position Data
Visited

2 Specific Information
Visited

3 Budget Incumbents
Visited

4 Review and Submit
Not Started

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 Req'd ☐ No

VPA Covered ☒ Yes

Position Information

*Position Status Approved

*Status Active

Action Date 08/11/2021

Alternate Work Schedule ☒ Yes

Key Position ☐ No

Budgeted Position ☒ Yes

Confidential Position ☐ No

Job Information

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

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**.

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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	
View Current Incumbents		
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		
View Current Incumbents		
Appointed Category	N/A	
Supervisor Lvl	E	Employee



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Viewing a Position
- Creating a Position



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.





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 0.000Cdn Tax 0.000

Deductions 0.000Total 0.00

Tax 0.000

Update Incumbents Yes

Include Salary Plan/Grade Yes

Force Update for Title Changes Yes

Current Incumbents1 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

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.

< Search Results

Position Details

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

Clone

+

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

Cancel

Request Details

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

Employee

Empl ID

Empl Record 0

Work Location Details ?

1 of 3

*Effective Date

03/01/2023

Effective Sequence

0

HR Status

Active

Payroll Status

Active

*Action

Position Change

Reason

Reports To/Supv Change

*Job Indicator

Primary Job

Go To Row

Position Number

CJS00123

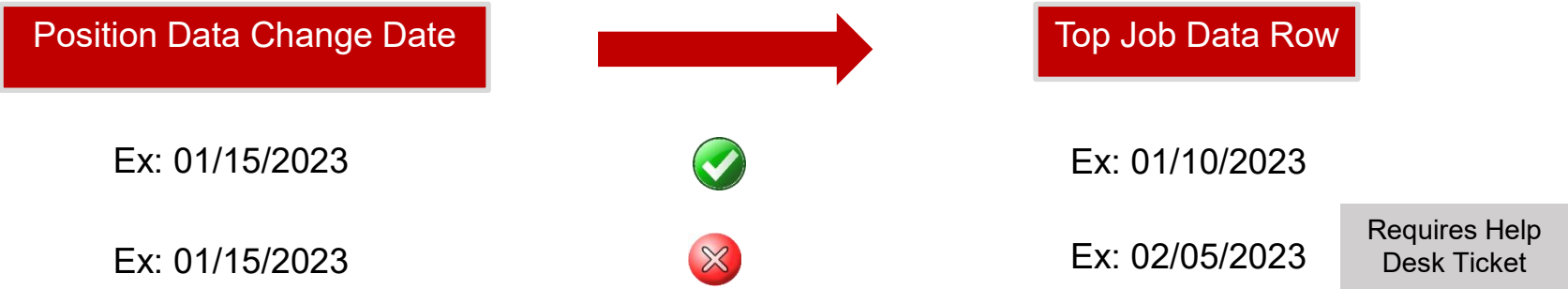
Accounts Payable Accountant

Current



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

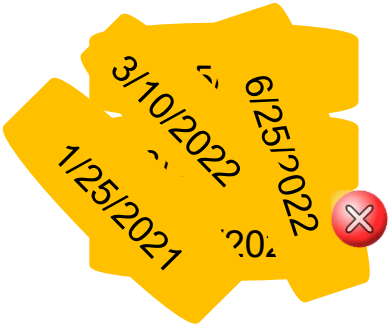
Job Data Rows Effective Dates

Position Change Effective Date

Job Data Rows Effective Dates

6/10/2022

Requires Help Desk Ticket



7/10/2022

7/10/2022

6/25/2022

3/10/2022

1/25/2021





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.

Cancel

Create Position

Continue

*Position Number

*Effective Date

Effective Sequence

0

Reason

NEW

New Position

Position Data page – Effective Sequence updates systematically

Work Location

Job Information

Payroll

Salary Plan

Compensati

Employee

Empl ID

Empl Record

Work Location Details

*Effective Date

Effective Sequence

0

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 web interface for job data changes. At the top, there are tabs: 'Work Location' (highlighted in green), 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'. Below the tabs, there are fields for 'Employee' (a greyed-out box), 'Empl ID' (a greyed-out box), and 'Empl Record' (0). A section titled 'Work Location Details' with a help icon (?) contains a red-bordered box. Inside this box, the '*Effective Date' field is set to '07/08/2022' with a calendar icon, and the 'Effective Sequence' field is set to '1'. A red arrow points from step 5 of the instructions to the 'Effective Sequence' field. To the right of the red box, there is a '*Action' label.



Demonstration

In this demonstration, the instructor will demonstrate the following:

- Change to a Position with an Incumbent



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.





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.

< Search Results

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 >

Cancel

Clone

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

Employee Position Reports

Non-Faculty

Q | < < 1-3 of 11 > > | View All

*Effective Date		Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
08/31/2022	General Fund	2	1.50	141	106.50	2	7.00
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	5	2.50	57	47.50	1	6.00

*Effective Date

07/31/2022

General Fund

Restricted Headcount

2

Restricted FTE

1.50

Non-Restrict Headcount

141

Non-Restrict FTE

106.00

Wage Headcount

2

Wage FTE

9.00

☒ Certified?

Non-Genl Fund

5

3.50

57

47.00

2

6.00

*Effective Date

06/30/2022

General Fund

Restricted Headcount

2

Restricted FTE

1.50

Non-Restrict Headcount

140

Non-Restrict FTE

108.50

Wage Headcount

3

Wage FTE

10.00

☒ Certified?

Non-Genl Fund

5

3.50

58

47.50

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 Checkpoint

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



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



2. How many characters will the prefix for positions have?
 - a) Five
 - b) Four
 - c) Three



3. True or False. The **Effective Sequence** field on the Position Data page is updated manually by the HR Administrator.



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:

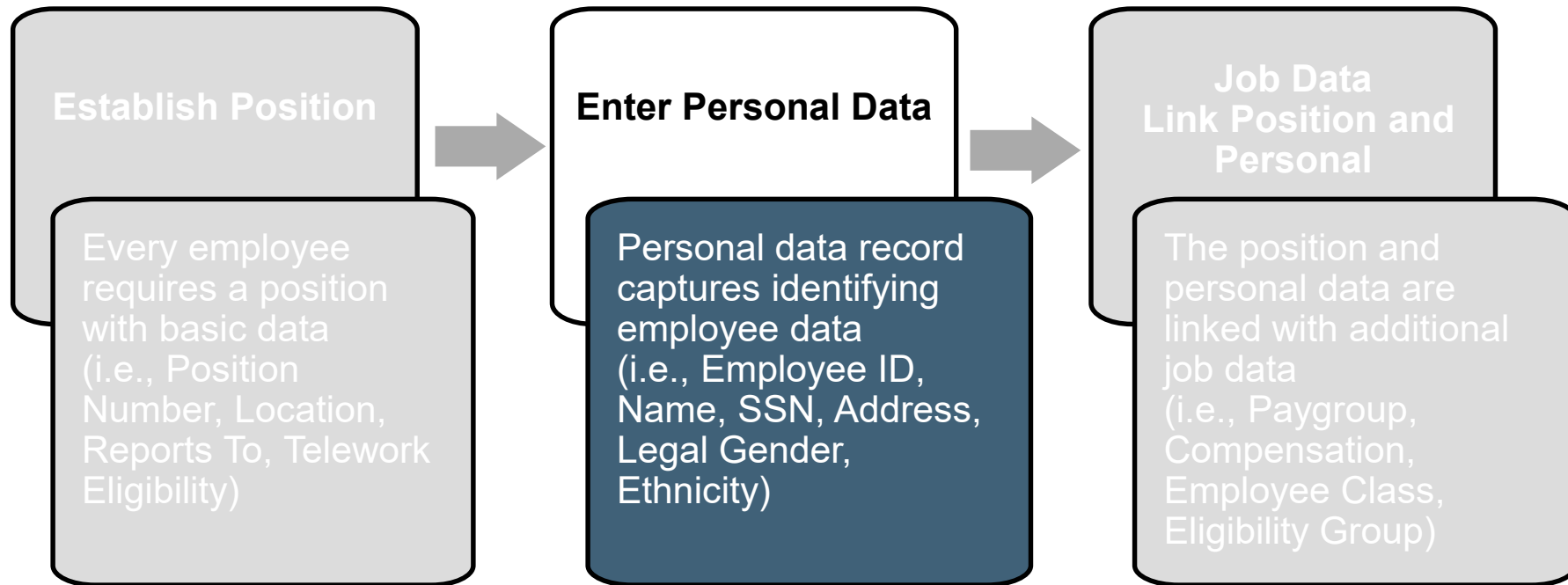
- Performing Search Match
- Entering new hire personal data
- Updating personal data
- Finding only personal data in Cardinal



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

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

[Add Person](#)

[Search for Matching Persons](#)

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

Search by SSN

User Default

Search

Clear All

Carry ID reset

Search Criteria ?

Search Fields

National Id

Value

Search by Order Number ?

Search Order	Description
10	NID Only

Select

Search



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

1-1 of 1

View All

		Empl ID	Last Name	First Name	Middle Name		
1	<div>Carry ID</div>					Person Organizational Summary	<div><div>+</div><div>-</div></div>



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

Employment Instances

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

Assignments

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.

Staged employee →

Person Organizational Summary

Simone Larmond Person ID 008: 

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

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

NEW

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

*Effective Date p6/22/2023

*Format Type English

Display Name

Add Name

Biographic Information

Date of Birth

Years 0 Months 0

Birth Country USA

United States

Birth State

Birth Location

Exclude Contact Information?

Biographical History

*Effective Date 06/22/2023

*Gender Unknown

*Highest Education Level Not Indicated

*Marital Status Unknown

Language Code

Alternate ID

Full-Time Student

As of

National ID

*Country USA

*National ID Type Social Security Number

National ID

Primary ID

1-1 of 1

View All



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

*Effective Date

06/22/2023

*Format Type

English

Display Name

Add Name

61



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

▼

*First Name

Middle Name

*Last Name

Name Suffix

▼

Display Name

Formal Name

Name

OK

Cancel

Refresh 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

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

06/22/2023

*Gender

Unknown

*Highest Education Level

Not Indicated

*Marital Status

Unknown

Language Code

Alternate ID

☐ Full-Time Student

As of

+

-



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			
<div>USA</div>	<div>Social Security Number</div>		<div></div>	<div>+</div>	<div>-</div>	

Notify

Refresh

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		Add Address Detail	+	-

Phone Information

1-1 of 1

View All

*Phone Type	Telephone	Extension	Preferred			
<div></div>			<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			
<div></div>		<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	+	-	
<div></div>				Add Address Detail	+	-	

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

CountryUnited States

Address 11

Address 2

Address 3

City

State

Postal

County

OK




Cancel



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	Edit/View Address Detail			

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		
<div></div>	<div></div>	<div></div>	<div></div>	<div>+</div>	<div>-</div>

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		
<div></div>	<div></div>	<div></div>	<div>+</div>	<div>-</div>



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 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		
<div>Business</div>	<div></div>	<div><input checked="" type="checkbox"/></div>	<div>+</div>	<div>-</div>



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

USA

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 »

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

Personal Information

Your Personal

Name:

Date of Birth: / /

Nationality:

Gender: ☐ Male ☐ Female

Unit No:

Town/City/Suburb:

Country:

Street:

State:

Post Code:

DEPLOYMENT

1. Putting your strategy into action is how your marketing plan should work. ☐ Yes ☐ No

2. The objectives will be based on how you plan sales by acquiring and keeping customers. ☐ Yes ☐ No

3. Marketing strategy's goal is to increase sales and achieve advantage over other competitors. ☐ Yes ☐ No

4. It's a process to allow an organization to focus resources on the greatest opportunities to increase sales and achieve the company's target. ☐ Yes ☐ No

5. You should consider on thinking what your customers need you to be. ☐ Yes ☐ No

6. It should have the details on how your sales are followed up and the strategy of branding you have should be consistent, because it leads to a strong brand equity. ☐ Yes ☐ No

7. The marketing plan should be innovative. ☐ Yes ☐ No

8. You should consider on thinking what your customers need you to be. ☐ Yes ☐ No

9. The strategy of branding you have should be consistent, because it leads to a strong brand equity. ☐ Yes ☐ No

10. Do you wear glasses or contact lenses? ☐ Yes ☐ No

11. Do you have a physical or mental condition which requires that you take special precautions? ☐ Yes ☐ No

12. Have you ever had a seizure, blackout, or loss of consciousness? ☐ Yes ☐ No

13. Do you have a physical condition which requires you to take special precautions? ☐ Yes ☐ No



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

Biographical Details

Contact Information

Regional

VA Person Info

Person ID

Power Of Attorney

Linked Participant EmplID

Preferred Pronoun

He/Him

Preferred Gender

Non-Binary

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display



Updating Citizenship

Citizenship information is required.

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

Citizenship/Passport

Person ID [REDACTED]

Citizenship/Passport ?

1 of 1

*Country [USA] United States

Citizenship Status [Native]

Go To Row

+

-

Passport Information ?

1 of 1

View All

*Passport Number []

Issue Date []

Expiration Date []

Country [USA] 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

Michael White

Person ID 123456789

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

Edit Address

Contact Phone

Phone

Save

Return to Search

Previous in List

Next in List

Notify



Emergency Contacts – Other Phone Numbers tab

Contact Address/Phone

Other Phone Numbers

Person ID

Emergency Contact

Q | << < 1 of 1 > >> | View All

Contact Name

Relationship to Employee Other

☐ Primary Contact

+ -

Other Phone Numbers for Emergency Contact

Q | << < 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

Disability	Accommodation Request	Accommodation Option	Accommodation Task
-------------------	-----------------------	----------------------	--------------------

Person ID

Disability Status

☐ Disabled

USA

Section 503

Disability Status

Disclosure Date

View History

Veteran

☐ Disabled Veteran



Demonstration

In this demonstration, the instructor will demonstrate the following:

- Perform a Search Match and add employee personal data only



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.





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


More...

Return From Leave


Empl ID	Name	Return

More...

Personal Details



Job Summary





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

82



Approve or Deny With Comments

Specific Name Change submission

Approve

Deny

Summary

Effective From 12/01/2020

Employee ID

Name Format English

Proposed Changes

Name	After Approval	Before Approval
Last Name		
Display Name		
Formal Name		
Name		

Change Request Details

Name Change Details

Approver Comments

Approval Chain



Viewing Name Change History

Biographical Details	Contact Information	Regional	VA Person Info
-----------------------------	---------------------	----------	----------------

Mitchell Lyons Person ID [REDACTED]

Name Q | < < 1-2 of 2 > > | [View 1](#)

*Effective Date

12/01/2022

*Format Type

English

▼

Display Name

Mitchell Lyons

Edit Name

Effective Date

10/25/2022

Format Type

English

Display Name

Michael Wills

+

-

View Name



Lesson Checkpoint

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



1. True or False. The (Legal) **Gender** value can stay as Unknown without causing a problem.



2. When using the **Pending Agency Provided** email option, which is the correct value to enter?

- a) employeename@noemail.virginia.gov
- b) agencyname@virginia.gov
- c) noemail@virginia.gov



3. True or False. Agency HR Administrator must enter a social security number for the employee to save personal data in Cardinal.



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.

Biographical DetailsContact InformationRegionalOrganizational RelationshipsVA Person Info

Test EmployeePerson ID NEW

Choose Org Relationship to Add

☒ Employee
☐ Contingent Worker
☐ Person of Interest

Empl Record 0

Select Checklist CodeHire

Add Relationship

Save

Notify

Refresh

Add

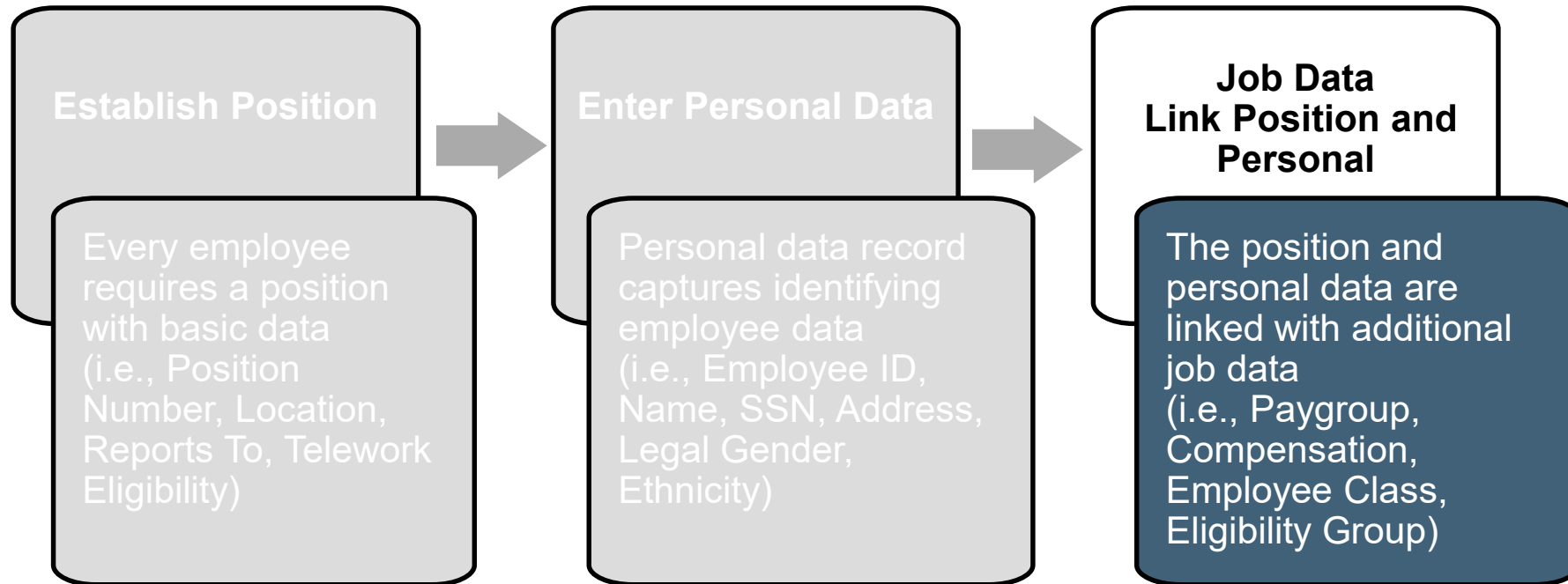
Update/Display



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 ?

1 of 1

*Effective Date 11/01/2020 

Effective Sequence 0

HR Status Active

Payroll Status Active


Calculate Status and Dates

*Action Hire


Reason


*Job Indicator Primary Job

Go To Row + -

Position Number 

Override Position Data

Position Entry Date 

Current 

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

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 ☐

Job Code 69113 Security Officer III
Entry Date 11/01/2020 SOC Code
Supervisor Level Supervisor Name
Reports To DOCHR001 Test-Director of Corrections [REDACTED]
Regular/Temporary Regular
Empl Class Full/Part Full-Time
*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 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	Search	Semimonthly Class (SATFRI07)	
Employee Type	S	Search	Salaried	Holiday Schedule HOLSAL Search Sal.HolSch
Tax Location Code	760	Search	Richmond (City)	
GL Pay Type				FICA Status Subject
Combination Code				Edit ChartFields

Absence Management System

Pay Group	SM1	Search	Semi-monthly Classified
-----------	-----	--------	-------------------------

Setting

<input type="checkbox"/> Use Pay Group Eligibility	Eligibility Group	VSDPELGGRP	Search	VSDP Eligibility Group
<input checked="" type="checkbox"/> Use Pay Group Rate Type	Exchange Rate Type		Search	
<input checked="" type="checkbox"/> Use Pay Group As Of Date	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 Empl ID Empl Record 0

Salary Plan Details ⓘ

Effective Date11/01/2020

Effective Sequence0

HR StatusActive

Payroll StatusActive

ActionHire

ReasonNew Hire

Job IndicatorPrimary Job

Go To Row

Current

Salary Admin PlanSW

Grade4

Step

↻

Statewide

↻

Statewide Salary Grade 4

Grade Entry Date11/01/2020

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 ?

Effective Date

Effective Sequence 0

HR Status

Payroll Status

Action

Reason

Job Indicator Primary Job

Go To Row

Current

Compensation Rate 2,083.333333

*Frequency S Semimonthly

Comparative Information ?

Pay Rates ?

Default Pay Components

Pay Components ?

Amounts Controls Changes Conversion

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

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 ?

Q

1-2 of 2

Amounts

Controls

Changes

Conversion

||>

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



Hiring an Employee – Benefits Program Participation

Benefit Status – Benefits Administration Eligibility

Benefit Status ⓘ

Benefit Record Number0

Effective Date06/10/2023

Effective Sequence0

HR StatusActive

Payroll StatusActive

ActionPay Rate Change

ReasonFY24 Statewide Increase

Job IndicatorPrimary Job

Go To Row

*Benefits SystemBenefits Administration

Annual Benefits Base Rate

USD

ACA Eligibility Details

Current

Benefits Employee StatusActive

Benefits Administration Eligibility ⓘ

BAS Group IDOEC

OE State

Elig Fld 1VSY0000

Elig Fld 2181001000

Elig Fld 3N

Elig Fld 4

Elig Fld 5

Elig Fld 630194

Elig Fld 7

Elig Fld 812-24

Elig Fld 9SF-GB

Benefit Program Participation Details ⓘ

Effective Date08/19/2002

Currency CodeUSD

Benefit ProgramSAL

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– 6)
- **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

Empl ID

Empl Record 0

Organizational Instance ?

Organizational Instance Rcd 0

Original Start Date

Override

Last Start Date

First Start Date

Termination Date

Org Instance Service Date

Override

Years 1

Months 3

Days 24

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date

Assignment End Date

Home/Host Classification Home

Company Seniority Date

Benefits Service Date

Seniority Pay Calc Date

Probation Date

Professional Experience Date

Business Title

SDP Effect Date

First Assignment Start 10/01/2021

Years 0

Months 0

Days 0

Time Reporter Data

Override

Override

Override

1

3

24

1

3

24

Last Verification Date

Position Phone

*Employee Eligible for Telework? Employee Eligible for Telework

Tenure Status/Contract Type

Alternate Leave Plan

Alternate Work Schedule



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 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**.

Hiring an Employee – Telework Agreement

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

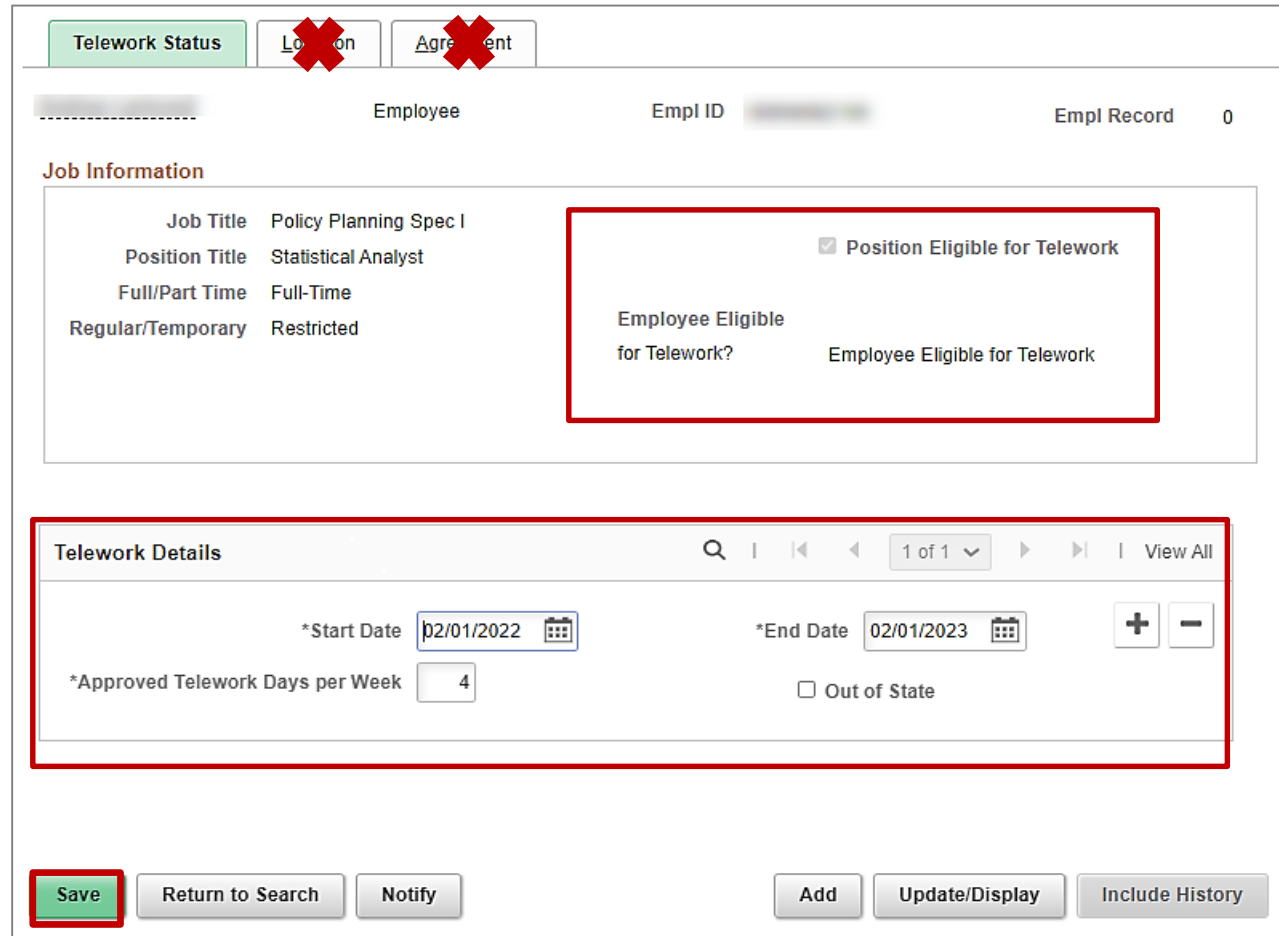
Review the **Job Information** section for **Position** and **Employee Eligibility for Telework**.

- 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 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 ☐ 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

New Window | Help | Personalize Page

Citizenship/Passport

Person ID

Citizenship/Passport ?

*Country

Citizenship Status

Go To Row

+ -

For further information on hiring an employee, 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**.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Hiring a new employee



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 Checkpoint

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



1. Which statements are true for the **Effective Date** on the Work Location tab? (Select all that apply)
 - a) It represents the hire date of the employee
 - b) It must be the same date or later than personal data effective date
 - c) It must always be the same effective date as personal data



2. The Agency HR Administrator enters the following information in **Job Data** for the new hire:
 - a) SSN, birth date, name, business address
 - b) Position, Pay Group, Compensation
 - c) Payroll Paysheet



3. True or False. The Benefit Eligibility fields 2, 3, 8, and 9 must be completed for all new hires.



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:

Empl ID ▼

 begins with

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

300

Search

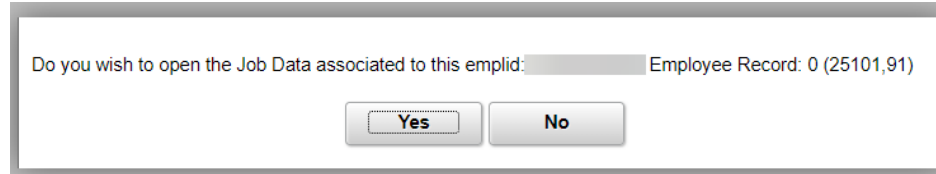
[Advanced Search](#)

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: [text box] 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

Work LocationJob InformationPayrollSalary PlanCompensation

EmployeeEmpl ID [REDACTED]Empl Record 0

Work Location Details ?

*Effective Date12/01/2021Job HistoryGo To Row+ -

Effective Sequence0

HR StatusInactive

Payroll StatusTerminated

*ActionTermination

ReasonConversion

*Job Indicator[REDACTED]

Position NumberCJS00203Program Support Specialist

Override Position Data

Position Entry Date02/01/1997

☐ Position Management Record

Regulatory RegionUSAUnited States



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 LocationJob InformationJob LaborPayrollSalary PlanCompensation

EmployeeEmpl ID [redacted]Empl Record 1

Work Location Details ?

*Effective Date07/28/2023Job HistoryGo To Row

Effective Sequence0

HR StatusActive

Payroll StatusActive

Calculate Status and Dates

*ActionHire

Reason

*Job Indicator

Position NumberCurrent

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

Annual Leave Eligibility Date

Previous State Service Months

Veteran's Service Credit Months

Total Service Credit Months

USA

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

Save

Return to Search

Notify

Refresh

Update/Display

Include History

114



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**.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Rehiring an employee
- Complete hire using New Employment Instance



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.





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 Checkpoint

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



1. The menu option to create a new employee record is
 - a) New Employee Record
 - b) New Employment Instance
 - c) New Employee Record Instance



2. True or False. The **Employment Information** page contains **Continuous State Service Date**, **Annual Leave Eligibility Date**, **Previous State Service Months**, **Veteran's Service Credits Months** and **Total Service Credit Months** for the rehired employee.



3. True or False. When rehiring an employee back to the same agency who is now going from wage to salary, a new employee record must be created.



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

Empl ID

Empl Record 0

Work Location Details ?

1 of 2

*Effective Date11/01/2020

Effective Sequence0

HR StatusActive

Payroll StatusActive

*ActionTransfer

ReasonPromotion

*Job IndicatorPrimary Job

Go To Row

+

-

Position NumberDLS00005

Senior Associate

Current

Override Position Data

Position Entry Date09/10/2006

Position Management Record

Regulatory RegionUSA

CompanyDLS

Business Unit10700

Department10700

Department Entry Date09/10/2006

LocationCENTR

Establishment IDDLS

United States

Div of Legislative Services

Div of Legislative Services

Div of Legislative Svcs Dept

Division of Legislative Servic

Division of Legislative Servic

Date Created12/10/2020



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 Empl ID Empl Record 0

Work Location Details ?

*Effective Date 02/12/2021

Effective Sequence 0

HR Status Active

*Action Pay Rate Change

Reason Competitive Salary Offer

Go To Row

+

-

Pay Components ?

Amounts

Controls

Changes

Conversion

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

Calculate Compensation



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Intra-Agency transfer – Promotion
- Intra-Agency transfer – Wage to Salary



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 Checkpoint

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



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



2. True or False. Additional job data fields (i.e., compensation) may need to be updated, as applicable.



3. True or False. 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**.



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

Empl ID

Empl Record 0

Work Location Details ?

1 of 1

*Effective Date 01/04/2021

Job History

Go To Row

+

-

Effective Sequence 0

*Action Termination

Reason Transfer Out

*Job Indicator Primary Job

HR Status Inactive

Payroll Status Terminated

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

Empl Record 1

Work Location Details ?

*Effective Date01/04/2021

Effective Sequence0

HR StatusActive

Payroll StatusActive

Job History

*ActionHire

ReasonTransfer In Promotion

*Job IndicatorPrimary Job

Go To Row

+

-

Position NumberDOCHR002

Test-Corr Ent Personnel Asst

Override Position Data

Position Entry Date01/04/2021

Position Management Record

Regulatory RegionUSA

CompanyDOC

Business Unit70100

Department125

Department Entry Date01/04/2021

LocationCRO

Establishment IDDOC

United States

Dept of Corr - Central Admin

Dept of Corr - Central Admin

PROCUREMENT & RISK MGMT

Central Regional Office

Dept of Corrections

Date Created01/07/2021



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Enter an Inter-Agency Transfer



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 Checkpoint

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



1. True or False. The **New Employment Instance** option is used to hire an employee who is transferring to a new agency.



2. True or False. The Reason Codes used for Inter-Agency transfers to keep benefits active are Transfer In and Transfer Out.



3. True or False. The agency receiving the employee must process their portion of the inter-agency transfer first.



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)

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
Effective Sequence 0
Go To Row + -

HR Status Active
Payroll Status Leave With Pay

*Action Paid Leave of Absence
Reason Personal
*Job Indicator Primary Job

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

Current

Leave of Absence (Unpaid)

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
Effective Sequence 0
Go To Row + -

HR Status Active
Payroll Status Leave of Absence

*Action Leave of Absence - Unpaid
Reason FMLA - EE Medical
*Job Indicator Primary Job

Position Number DLS00005 Senior Associate
Override Position Data

Current



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		STD Claim Number	
Expected Return Date		Layoff Notice Date	
Last Date Worked		Recall Eligibility Flag	
Turn Off Auto Pay			
<div>Job Data Employment Data Earnings Distribution Benefits Program Participation</div>			
<div>Save Return to Search Previous in List Next in List Notify Refresh</div>			
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 ?

Effective Date03/30/2023

Effective Sequence0

HR StatusActive

Payroll StatusLeave With Pay

ActionPaid Leave of Absence

ReasonShort-Term Disability

Job IndicatorPrimary Job

Current

Go To Row

Payroll SystemPayroll for North America

Absence SystemOther

Payroll for North America ?

Pay GroupSM1

Semimonthly Class (SATFRI07)

Employee TypeS

Salaried

Tax Location Code760

Richmond (City)

GL Pay Type

Combination Code

Holiday ScheduleHOLSAL

Sal.HolSch

FICA StatusSubject

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

Empl ID

Empl Record 0

Work Location Details ?

1 of 2

*Effective Date02/08/2021

Effective Sequence0

HR StatusActive

Payroll StatusLeave With Pay

*ActionPaid Leave of Absence

ReasonFMLA

*Job IndicatorPrimary Job

Go To Row

+

-


Position NumberCJS00400

Current



Non-Confidential Notes and Comments

Notepad functionality

 **Selected Note**

► **Instructions**



Add Performance Note

Applications

Employee ID	<input type="text"/>	Created	12/11/2020 3:56PM
Empl Rcd Nbr	0	Creator	<input type="text"/>
Effective Date	2020-12-11	Last Update	
Effective Sequence	0	Updated By	

Subject

Note Text





Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Entering Short-Term Disability Paid Leave of Absence
- Return from Short-Term Disability Paid Leave of Absence
- Entering a Paid Leave of Absence
- Returning from Leave of Absence
- Entering an Unpaid Leave of Absence
- Returning from Unpaid Leave of Absence



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 Checkpoint

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



1. True or False. Setting the **Turn Off Auto Pay** field to **Yes**, turns off the automatic payroll processing and additional payments for the employee.



2. True or False. The Agency HR Administrator will insert a row in Personal Data to place the employee on Leave.



3. True or False. Employees on Leave of Absence will appear on the **Return from Leave** tile on the Cardinal Homepage.



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 Empl ID Empl Record 0

Work Location Details ?

*Effective Date02/12/2021

Effective Sequence0

HR StatusInactive

Payroll StatusTerminated

*ActionTermination

ReasonResignation

*Job IndicatorPrimary Job

Go To Row

+

-

Position NumberDOT00007

State Eng Materials

Override Position Data

Current

Position End Date12/31/2020



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Termination / Resignation
- Termination / Death
- Retirement / Service Retirement



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 Checkpoint

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



1. True or False. The **effective date** of a termination is the last day the employee worked.



2. True or False. The personal email must be obtained upon separation and entered in Personal Data as the preferred email address.



3. True or False. If registered with a valid email address, for 18 months from the effective date of the separation, former employees or their family, will have access to Cardinal for W2s and pay history.



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 SP1



Misc Agency Supplemental Pay 1

+ -

Effective Date

Find | View All First 1 of 1 Last

Effective Date 01/28/2021



+ -

Payment Details

Find | View All First 1 of 1 Last

*Addl Seq Nbr 1

End Date 12/28/2022



+ -

Rate Code



Reason Not Specified



Earnings \$100.00

Hours

Hourly Rate

Goal Amount

Goal Balance

Sep Check Nbr

☐ Disable Direct Deposit

☒ OK to Pay

☐ Prorate Additional Pay

Applies To Pay Periods

☒ First

☒ Second

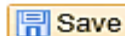
☐ Third

☐ Fourth

☐ Fifth

Job Information

Tax Information



Save



Return to Search



Previous in List



Next in List



Notify



Refresh



Update/Display



Include History



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

Agency Specific Additional Pay Earnings (e.g. supplement for working conditions)				
Earn Code	Description	Add to Gross Income	Taxable	Notes
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	
Typical Additional Pay Earnings for Higher Education				
Earn Code	Description	Add to Gross Income	Taxable	Notes
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	



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Adding Additional Pay
- Modifying an Additional Pay
- Stopping an Additional Pay



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.





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 – Monetary Rewards

Reward IDs

- 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



Rewards and Recognition Types

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 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: [Text Area] 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 + -



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Entering a Monetary Reward



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 Checkpoint

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



1. True or False. VRS Contribution Base and Premium Reward earnings codes are entered on the Additional Pay page by the HR Administrator only when the employee is first hired.



2. True or False. Additional pay that requires proration (partial payment amount) must be sent to the Payroll Administrator to process via the SPOT tool.



3. Monetary rewards are not sent to the Payroll Administrator for payment via the SPOT tool.



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**.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Running a Report
- Running a Query
- Creating Query Favorites



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

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

Total Incident 0

Empl Record 1

Written Notice

1 of 1

View All

*Type

+

-

*Reported Date

12/10/2020

*Description

Supervisor ID

Expiration Date

Offense Information

1 of 1

View All

*Offense Code

+

-

Offense Date

Save

Return to Search

Previous in List

Next in List



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Entering a Disciplinary Action



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.





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**.



Performance Rating Page

Navigation: Menu > Workforce Development > Performance Management > Performance Rating

Performance Ratings

Empl ID

Empl Record 0

Business Unit 60100

Name

Position VDHKBTST

Performance Ratings

Q | << < 1 of 1 > >> | View All

*Effective Date

Effective Sequence 0

*Rating Type

*Rating Cycle

*Rating

Supervisor

Reviewer

Re-Evaluation Status

Re-Evaluation Date

Comments

Date Entered

Entered By

Save

Return to Search

Update/Display

Include History



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Entering a Performance Rating



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 Checkpoint

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



1. Disciplinary actions are recorded in Cardinal for:
 - a) Classified employees only
 - b) Waged and Classified employees



2. True or False. In the case of a reversal, HR Administrators can delete information from the Disciplinary Actions page in Cardinal.



3. True or False. Performance ratings and Rewards and Recognitions can be uploaded for classified employees using the mass upload templates.



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

- How to Open a Cardinal Help Desk Ticket
- HR Data Relationship Follow Up
- Options for Mass HR Data Uploads



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) , 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) 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.



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
	Postion 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	



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.