HR351
Cardinal Employee Data Setup and Maintenance

Instructor Led Training

Rev 11/25/2024

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

1. Overview of Cardinal HCM
2. Human Resources Data Types
3. Managing Position Data
4. Managing Employee Personal Data
5. Managing Employee Job Data
6. Managing Job Data Updates

Agenda

7 Managing Additional Pay and Rewards & Recognitions

8 Running Reports and Queries

9 Managing Additional HR Data for VPA Covered Employees

Lesson

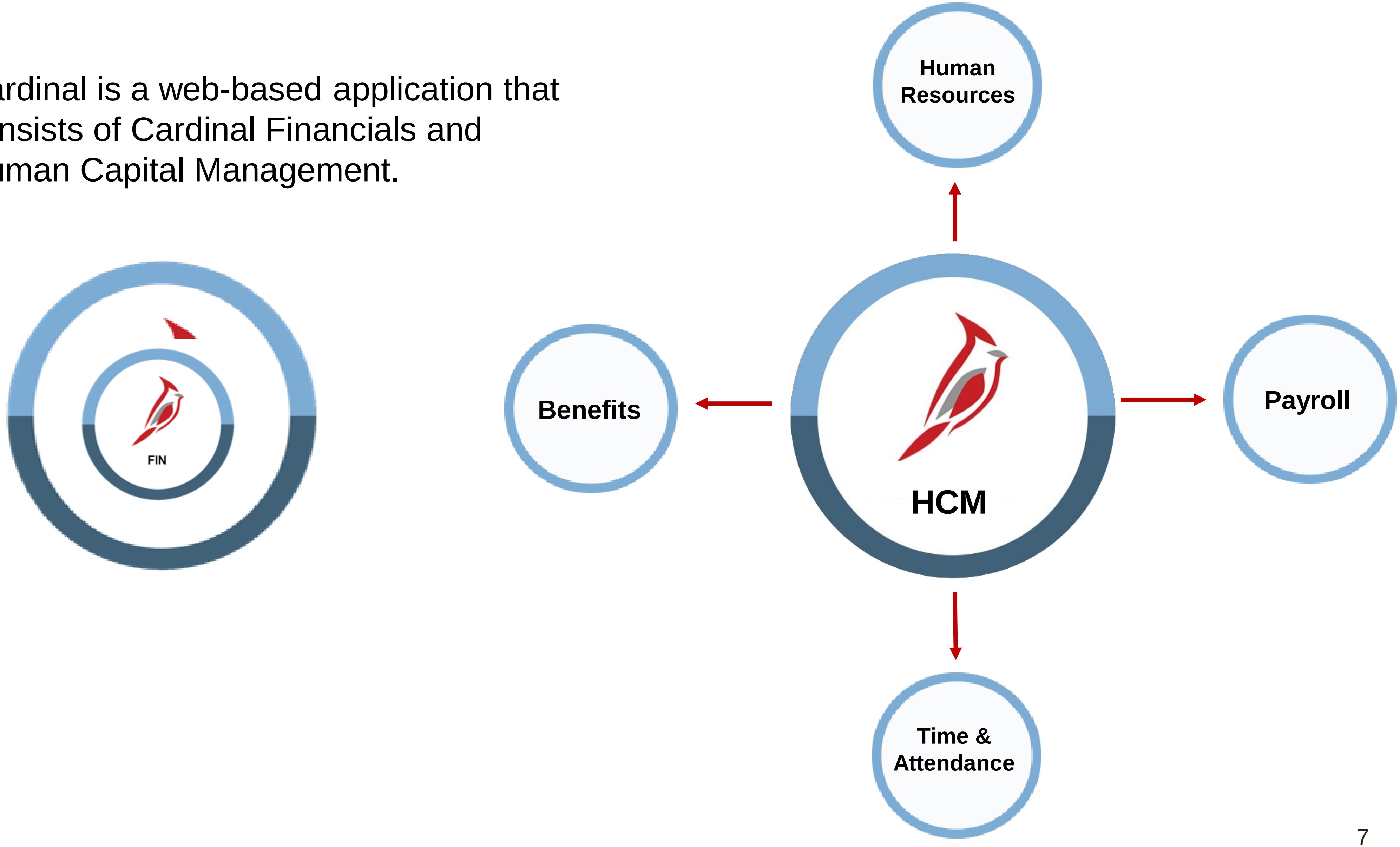
1 Overview of Cardinal HCM

This lesson covers the following topics:

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

Cardinal System

Cardinal is a web-based application that consists of Cardinal Financials and Human Capital Management.



Cardinal HCM Responsibilities and Relationships

State Payroll Operations (SPO)

- Defines Operations Calendar
- Runs Payroll Processes
- Runs Year End Processes

Human Resources (HR)

- Position Data
- Personal Data
- Job Data

Benefits (BN)

- Medical
- Flexible Spending Accounts (FSA)
- Retirement

Time & Attendance (TA)

- Time Entry
- Absence Entry
- Approvals

Payroll (PY)

- Earnings
- Deductions
- Taxes
- Review Paychecks

Accurate Paycheck and Benefits

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.

Establish Position Record

Every employee requires a **position** with basic data

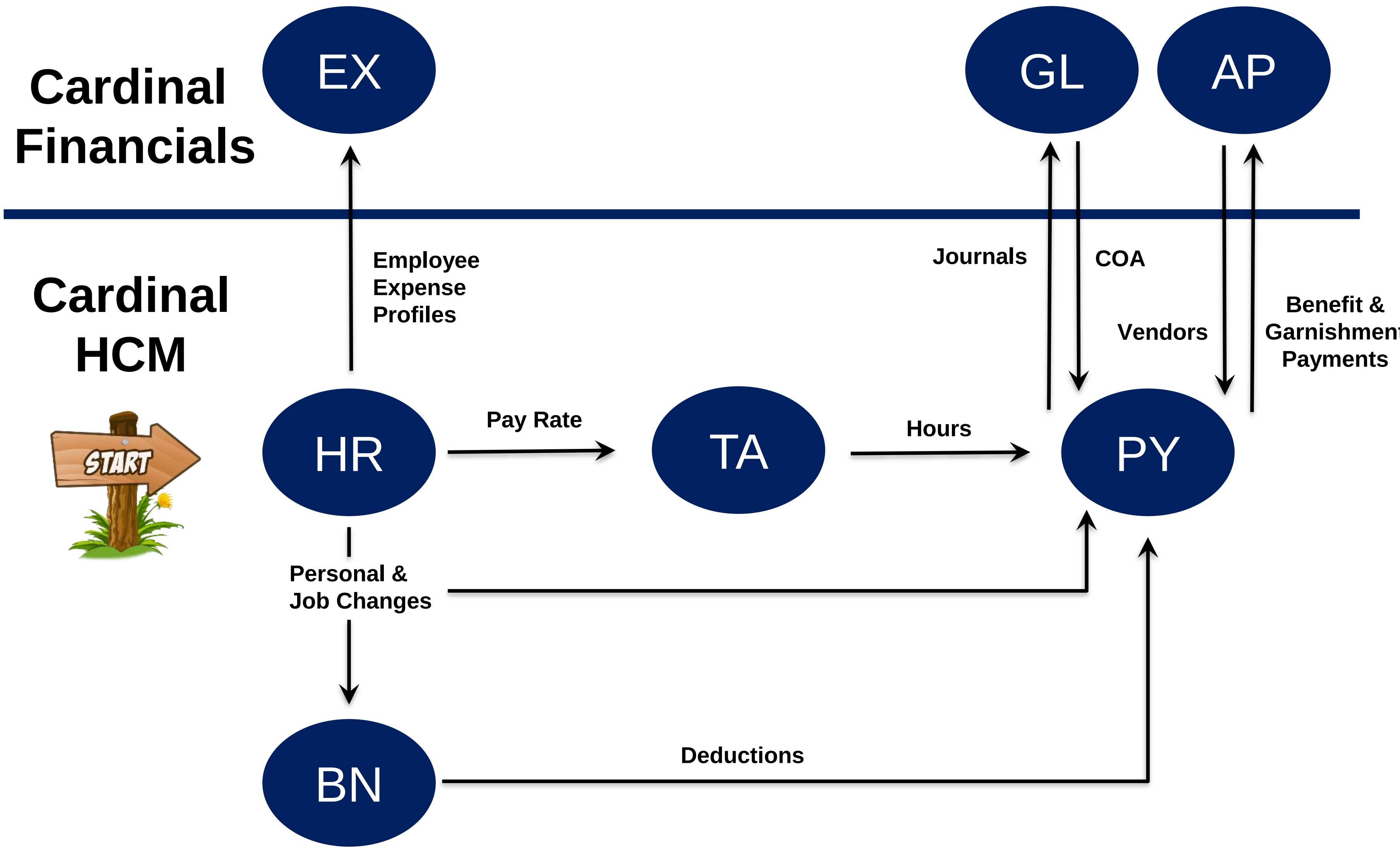
Enter Personal Data Record

Personal data record captures identifying employee data

Job Data
Link Position and Personal

The position is linked to personal data and additional job data are entered

Cardinal HCM Interfacing to Cardinal Financials



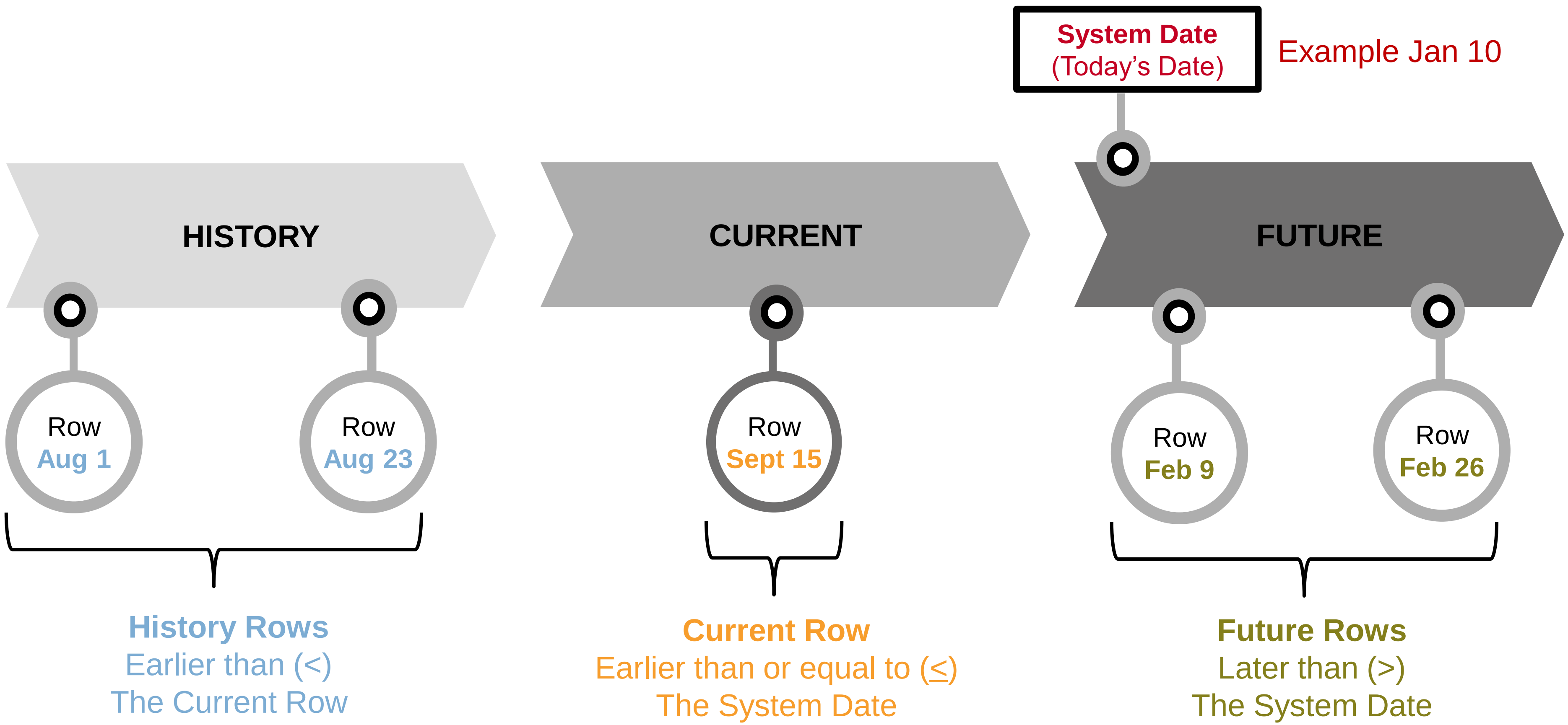
Financials: Expenses (EX), General Ledger (GL), Accounts Payable (AP)

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

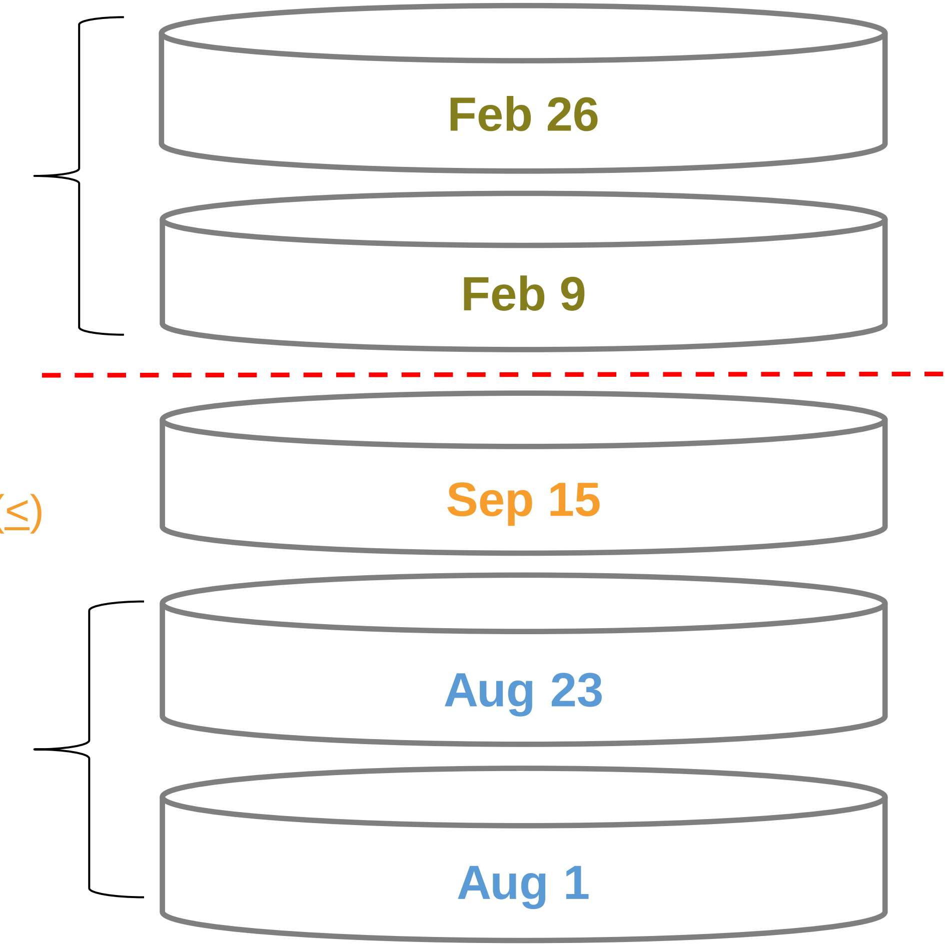
Cardinal Effective Dating

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



Future Rows
Later than (>)
The System Date

Rows waiting to be processed by Cardinal

System Date
Today’s Date Jan 10

Current Row
Earlier than or equal to (≤)
The System Date

Row Cardinal is currently using for processing

History Rows
Earlier than (<)
The Current Row

Rows Cardinal processed previously

Note: Send an email to vccc@vita.virginia.gov with Cardinal in the Subject to submit a helpdesk ticket.

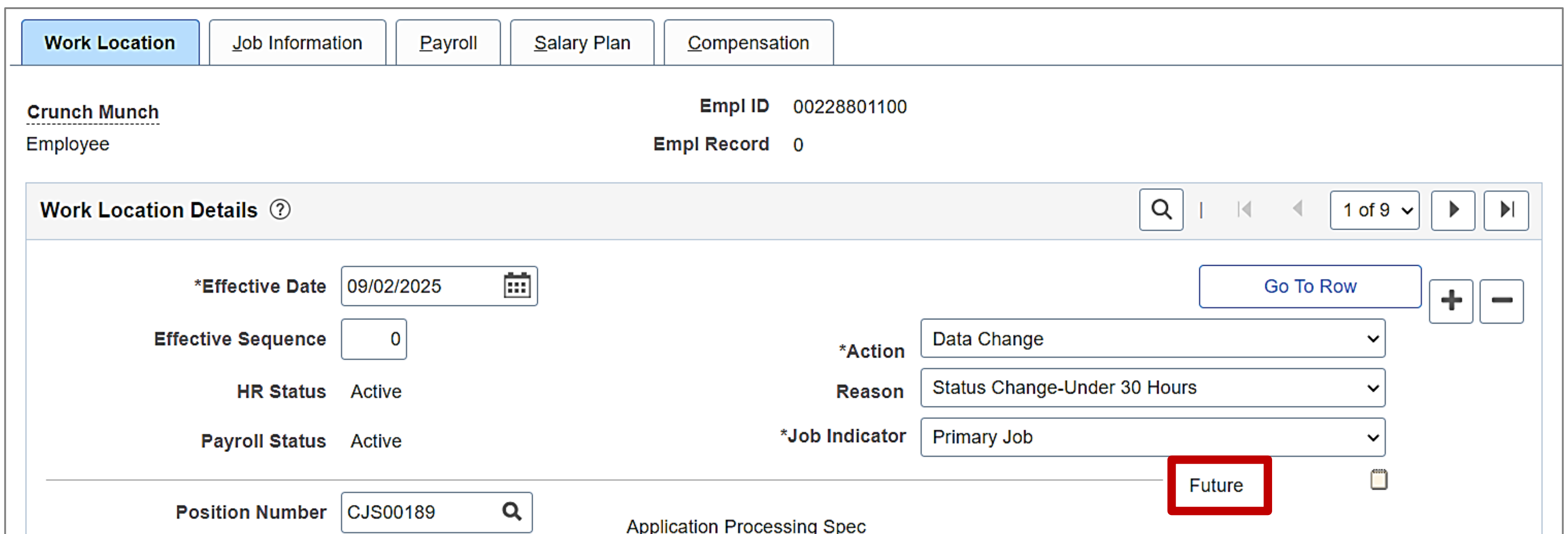
Additional Considerations Related to Future Dated Rows

When adding a future dated row in HR:

- It's important to note that they do not write updates to VNAV
- They are not allowed on interface files for interfacing agencies

When deleting a future dated row in HR:

- If there is a benefit related impact (i.e., Termination) the HR Administrator should notify the Benefits Administrator to enter a ticket with the PPS Benefits team to void a triggered event



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: 10/10/2024

03/12/2024

10/02/2024

01/01/2025

10/01/2024

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 data types?
   A. 3
   B. 2
   C. 1

3. True or False. The HR Administrator is the only Cardinal role that can <u>insert</u> 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 and Financials.
- 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 Video

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.

Establish Position Record

Every employee requires a **position** with basic data

(i.e., Effective Date, Position Number, Location, FLSA Status, Department, Reports To, Supervisor, Telework Eligibility)

Enter Personal Data Record

Personal data record captures identifying employee data

(i.e., Effective Date, Employee ID, Name, DOB, SSN, Address, Legal Gender, Email Address)

Job Data
Link Position and Personal

The position is linked to personal data and additional job data are entered

(i.e., Effective Date, Pay Group, Employee Classification, Benefit Eligibility, Compensation, Telework Eligibility)

HCM Key Concept

1 POSITION DATA*

Position: DOA10001
Effective Date: MM/DD/YY
Pos Descr: Sr Account Analyst
Business Unit: 15100
Reports To: DOA10003

Position: DOA10002
Effective Date: MM/DD/YY
Pos Descr: Sr Account Analyst
Business Unit: 15100
Reports To: DOA10003

Position: ABC10012
Effective Date: MM/DD/YY
Pos Descr: Store Clerk
Business Unit: 99900
Reports To: ABC10123

3 JOB DATA*

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

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

Empl ID: 00100123600**
Effective Date: MM/DD/YY
Empl Rcd: 1
Position: ABC10012
Business Unit**: 99900
Benefit Program: WGE
Reports To**: ABC10123
Pay Rate: 12.00/hr

2 PERSONAL DATA*

Empl ID: 00100123400
Effective Date: MM/DD/YY
Name: Jane Doe
DOB: 5/1/2000
Address: 123 Main Street, Richmond, VA 23222
SSN: 123-45-6789
Legal Gender
Email Address

Empl ID: 00100123600
Effective Date: MM/DD/YY
Name: Mark Thomas
DOB: 5/1/2000
Address: 123 Valley Dr, Richmond VA 23222
SSN: 345-67-8999
Legal Gender
Email Address

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

Lesson 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

Establish Position

Every employee requires a position with basic data (i.e., Position Number, Location, Reports To, Telework Eligibility)

Enter Personal Data

Personal data record captures identifying employee data (i.e., Employee ID, Name, SSN, Address, Legal Gender, Ethnicity)

Job Data Link Position and Personal

The position and personal data are linked with additional job data (i.e., Paygroup, Compensation, Employee Class, Eligibility Group)

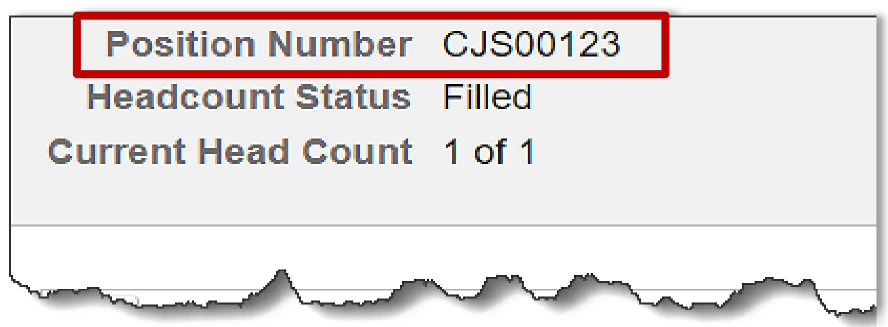
Creating and Maintaining Position Data

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 (i.e., CJS)
- Parent Agencies can enter positions for child Agencies

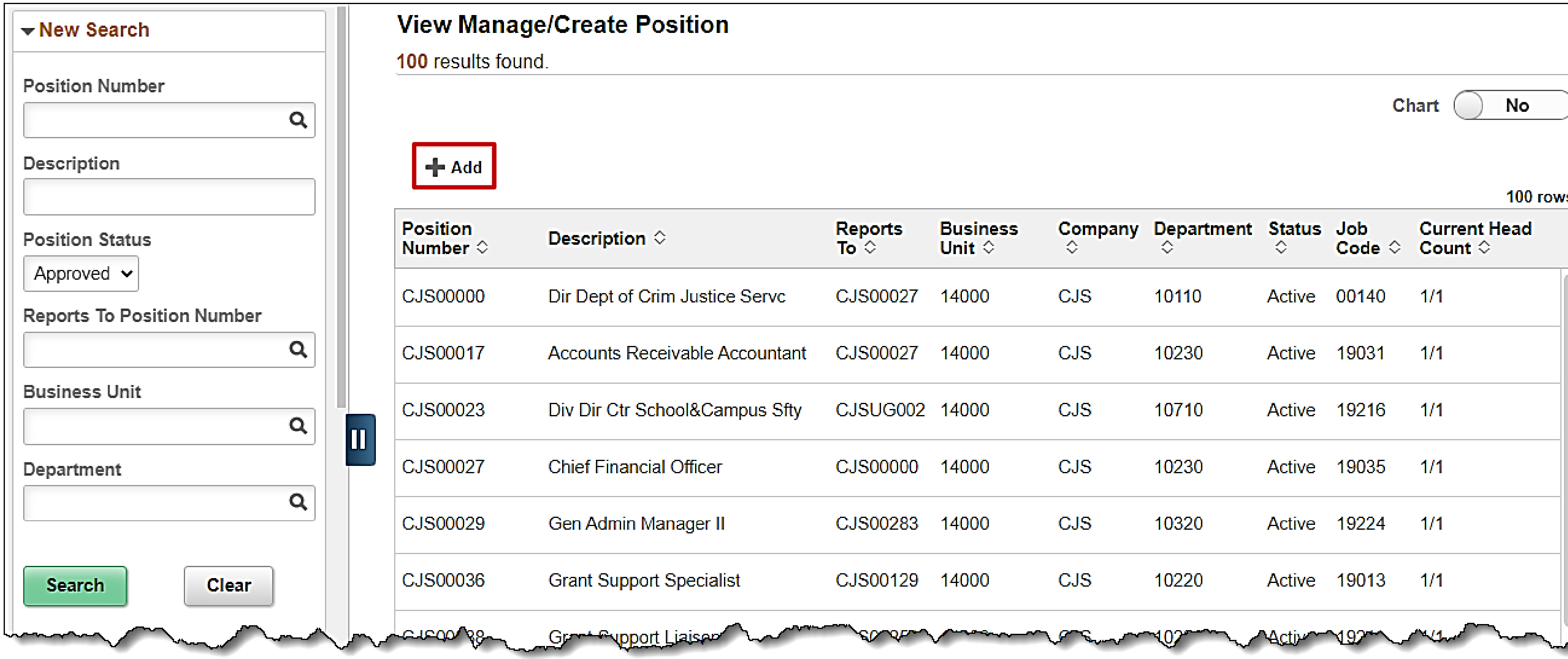
For further information on Creating, Cloning or Updating Positions, see the job aid titled **HR351 Managing Position Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



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

Creating New Positions

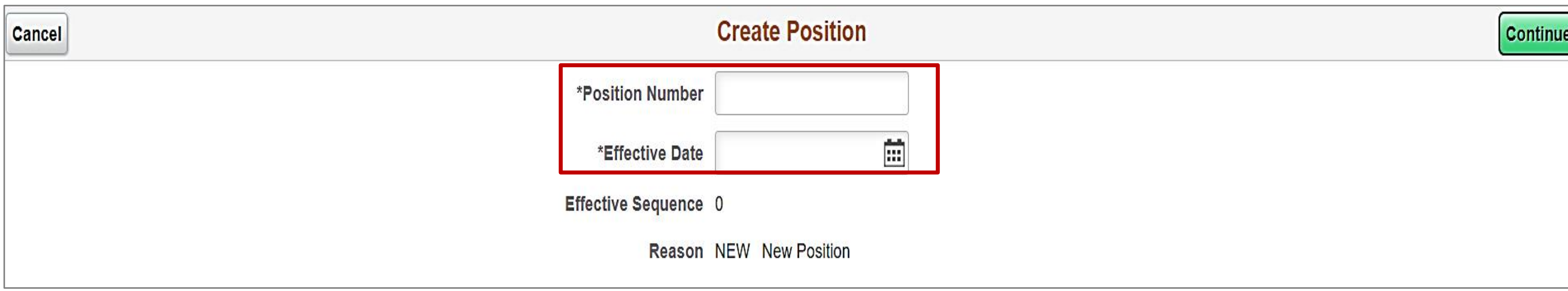
Navigation: Menu > Organizational Development > Position Management > Maintain Position Budgets > Manage Position



Position Number and Effective Date

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

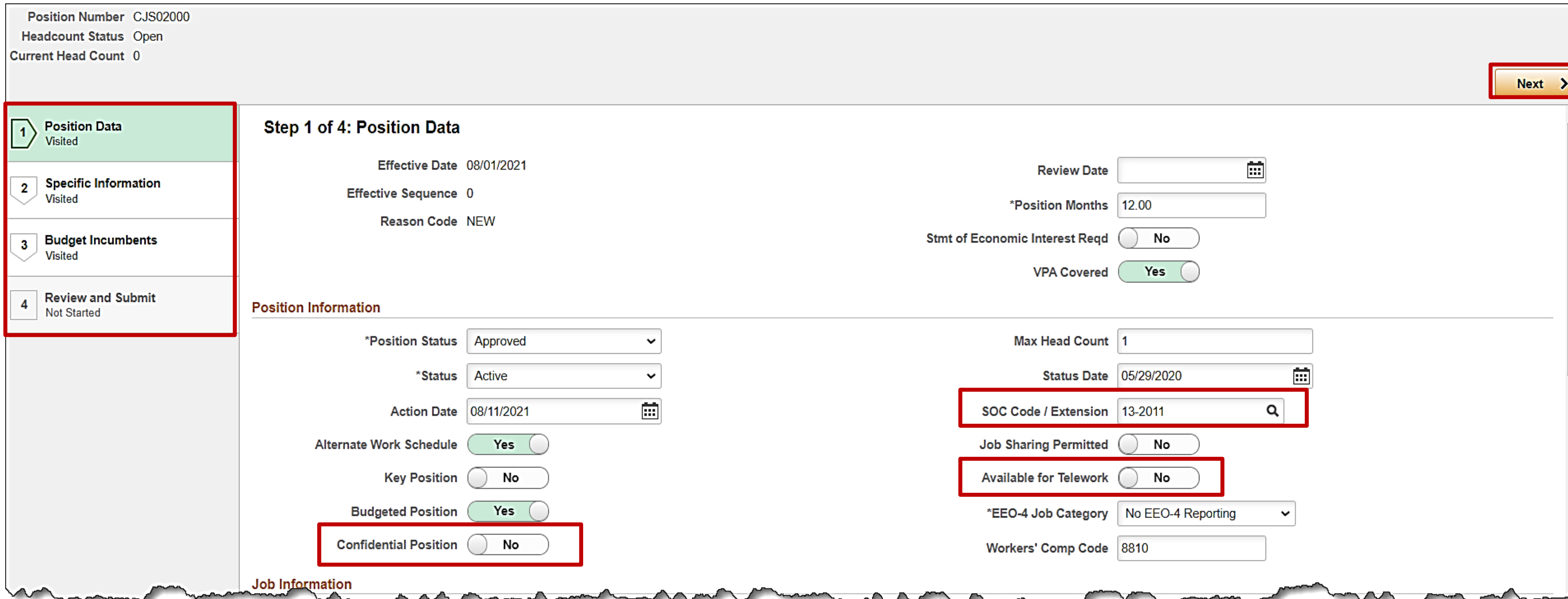
- Use your agency tracking file to determine the next available position number to provide to Cardinal.
- Enter the date this position should be effective.
- Click the **Continue** button.



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



For information on SOC Codes and Job Codes, see the job aid titled, **HR351_Overview of US SOC and Job Code Combinations.** This job aid is located on the **Cardinal Website** under **Learning**.

Reports To and Supervisor Fields

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

Work Location

Reg Region	USA	United States	Company	DLI
Department	18100	DEPT OF LABOR AND INDUSTRY	Dot-Line	
Location	MANA	MANASSAS REGIONAL OFFICE	Security Clearance	
Reports To	DLI00545	Consultation Program Manager	Supervisor Position	DLI00545
	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.

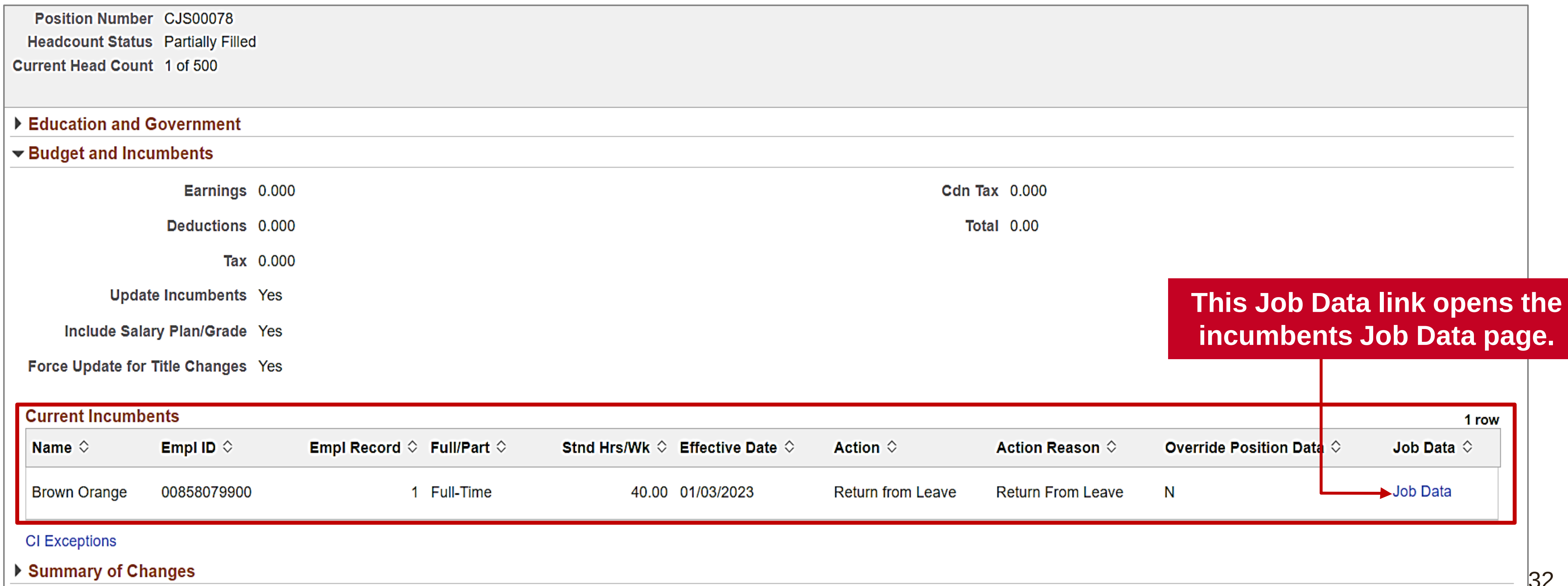
Work Location

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		

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



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.

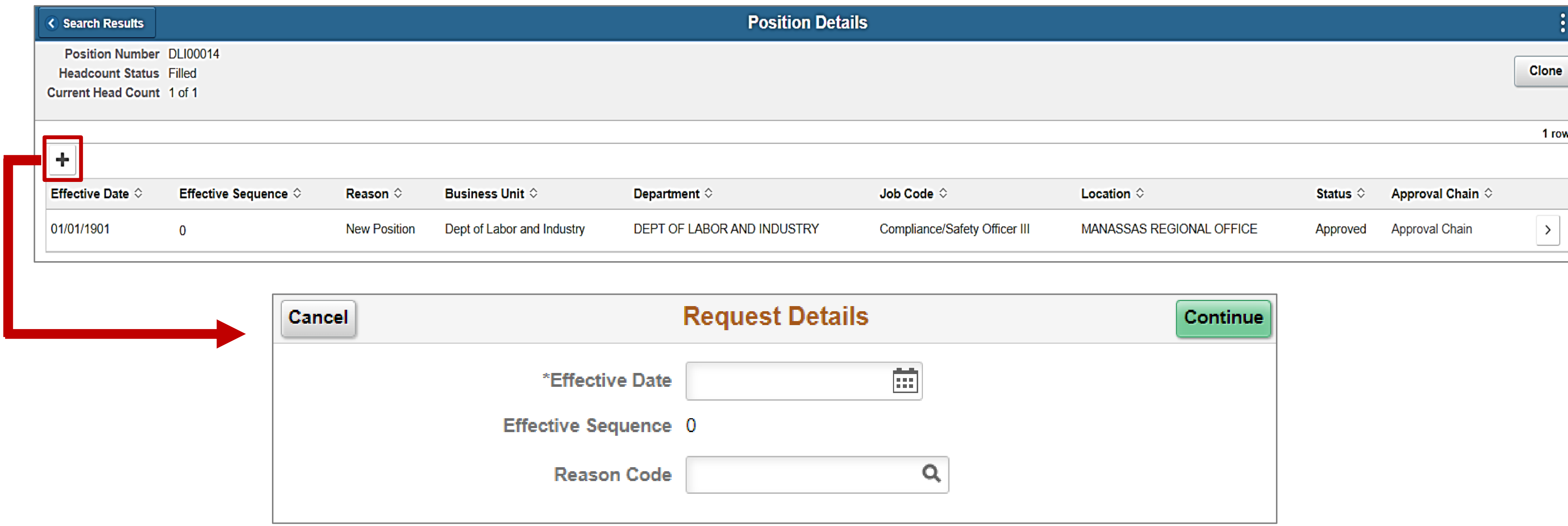
Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.

Updates to Positions with Incumbents

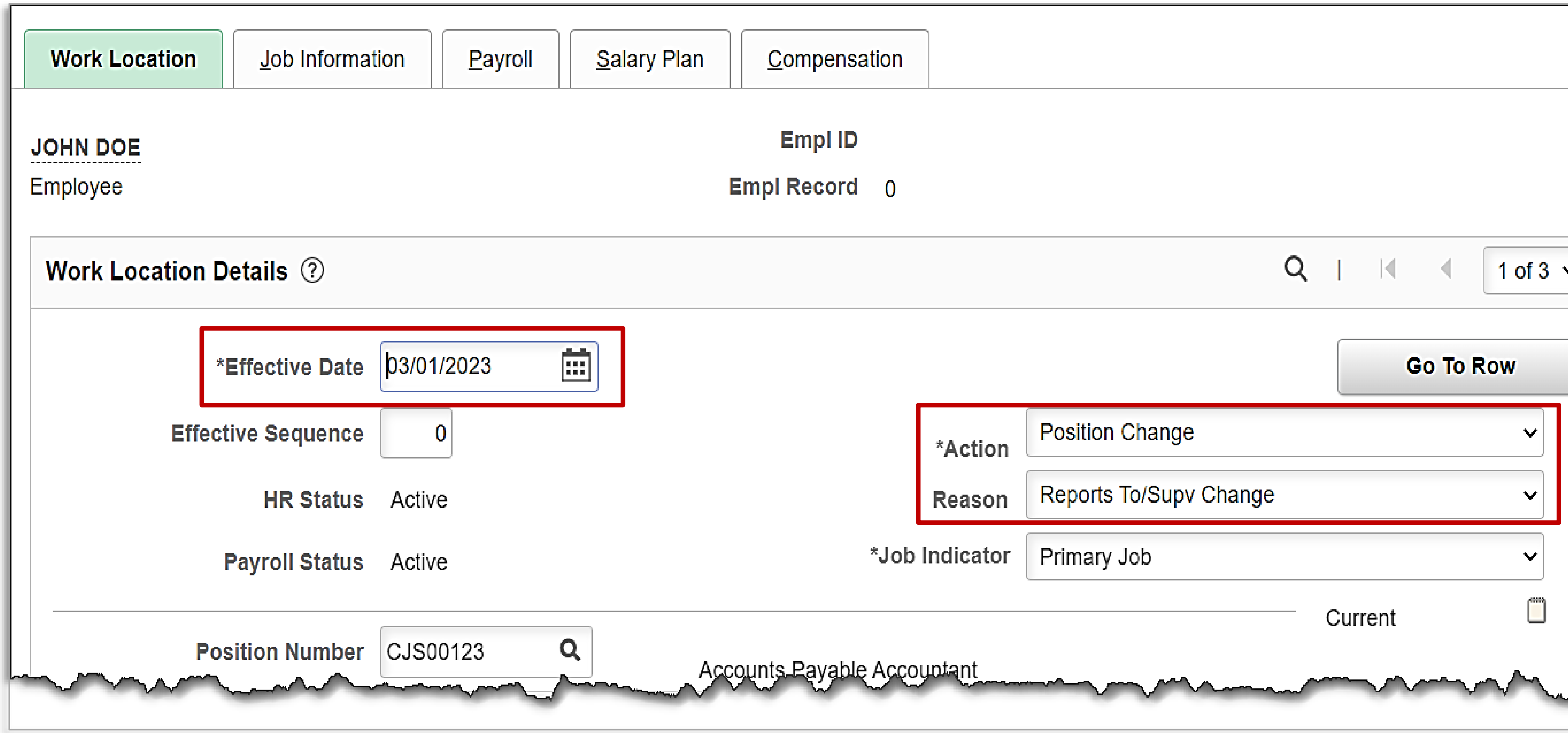
Changes made to a position are carried over to the incumbent employee's job data. Prior to making a change to the position, check the incumbent employee's job data to verify that the current effective dated row is prior to the proposed effective date of the position change. If it is not, the position 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.



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.



For further information on updated a position with an incumbent, see the job aid titled **HR351_Managing Position Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Effective Dating for Position Changes

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

Position Data Change Date		Top Job Data Row	
Ex: 11/15/2024	✔	Ex: 11/10/2024	
Ex: 11/15/2024	✘	Ex: 11/05/2024	Requires Help Desk Ticket

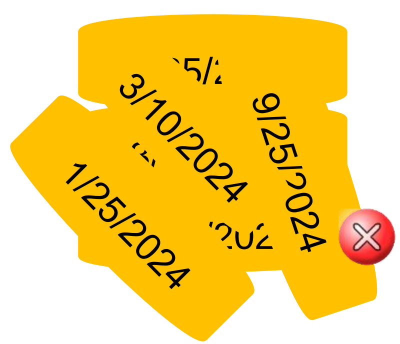
Note: Position changes that occur before the current effective dated row on Job Data, require a Help Desk ticket.

Position Change Effective Date

10/10/2024

Requires Help Desk Ticket

Job Data Rows Effective Dates



Position Change Effective Date

10/10/2024

Job Data Rows Effective Dates

10/10/2024

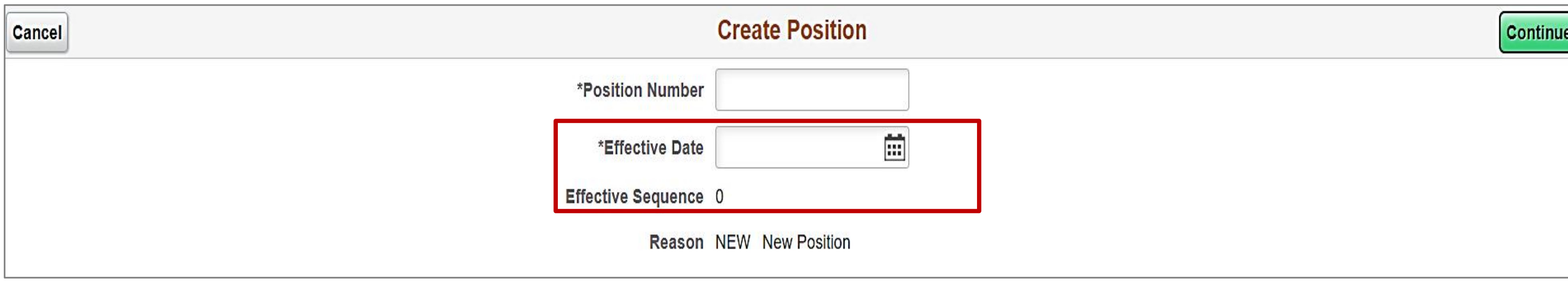
9/25/2024

3/10/2024

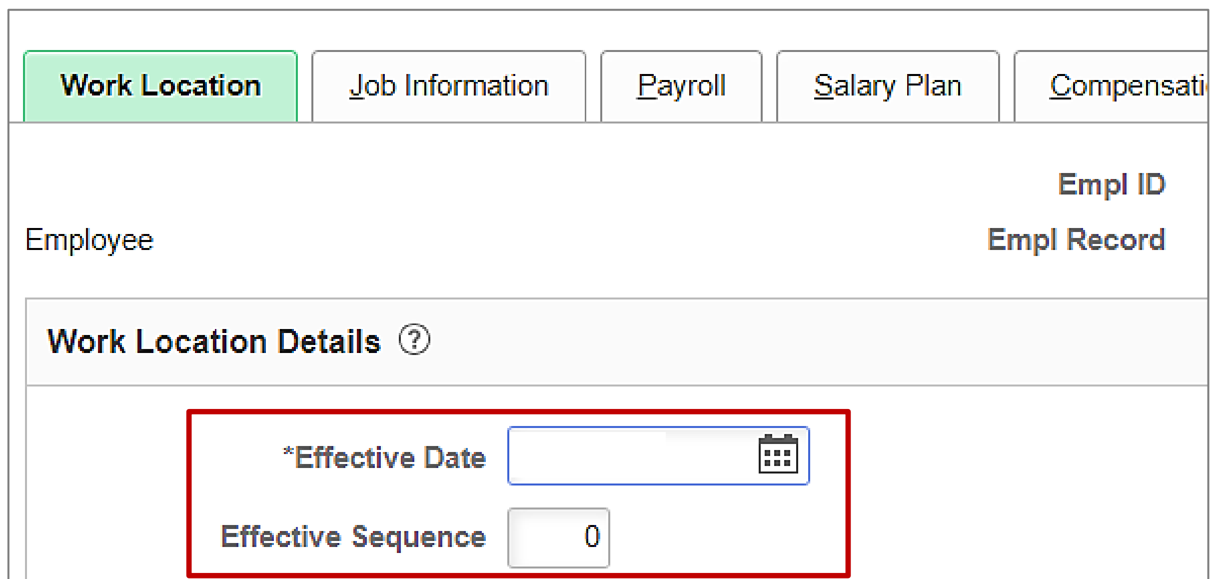
1/25/2024 ✔

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.



Position Data page – Effective Sequence updates systematically



Job Data page – Effective Sequence is updated manually

Using the Same Effective Date with Position and Job

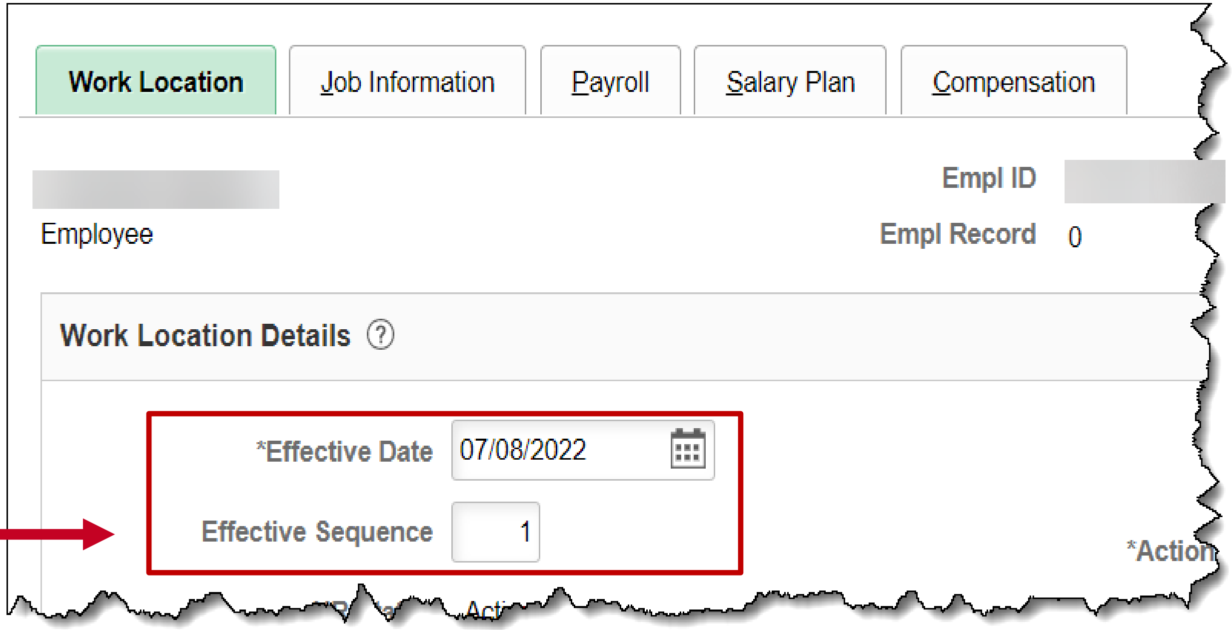
When a Position change and Job change have the same Effective Date, follow the steps below to ensure the changes are made in the appropriate order so that a help desk ticket is not required.

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

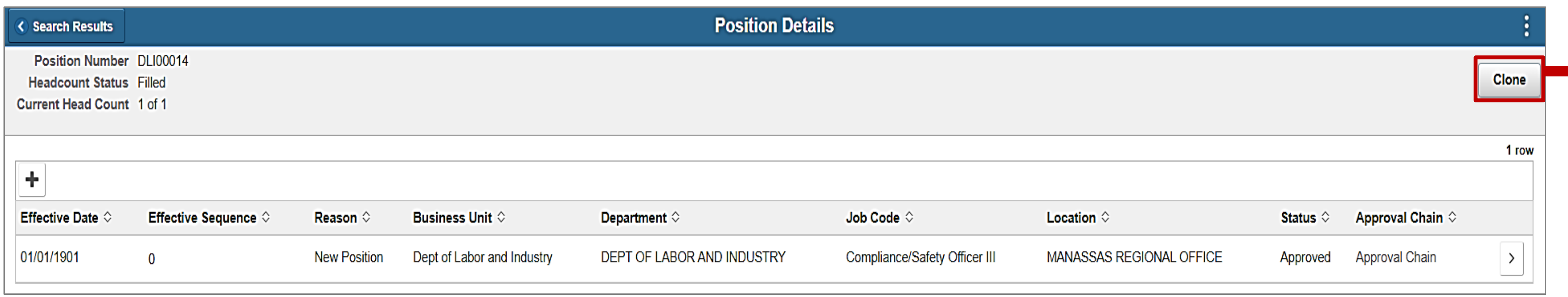
3. Navigate to the Job Data page.
4. Enter a new row with the same Effective Date as the position change.
5. Manually increment the Effective Sequence by 1.
6. Enter the applicable job data changes.

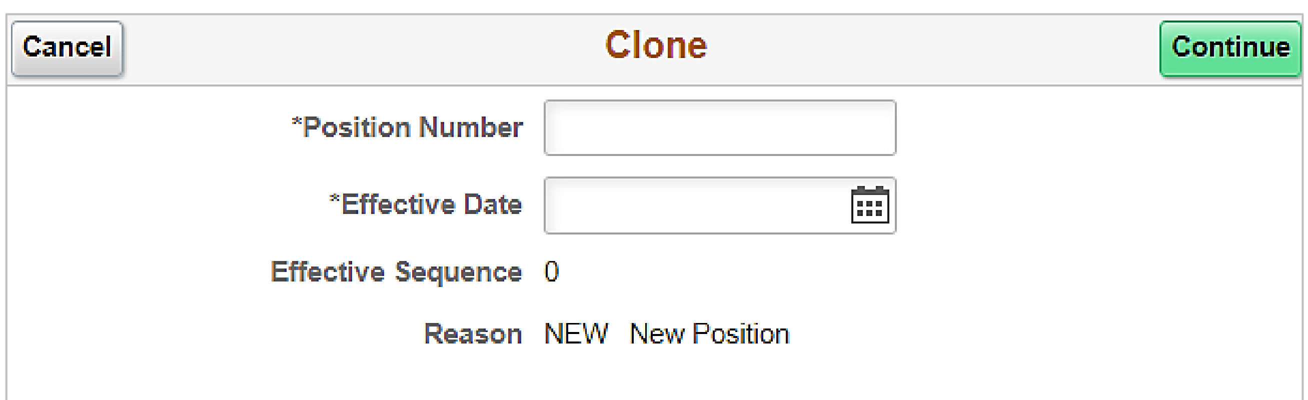


Cloning a Position

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.

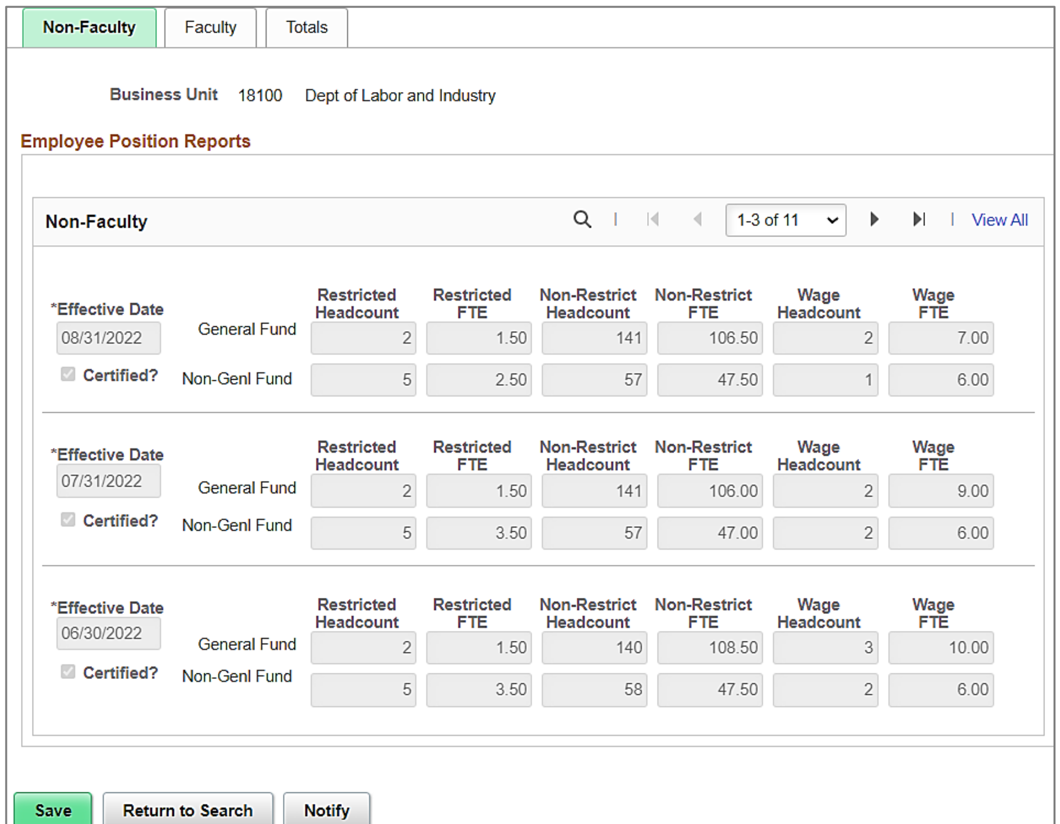




Using the Employee Position Report (EPR) Tool

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.

<u>Navigation</u>: 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 — 1-3 of 11 — View All

*Effective Date	Certified?	Fund	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
		Non-Genl Fund	5	2.50	57	47.50	1	6.00
07/31/2022	✓	General Fund	2	1.50	141	106.00	2	9.00
		Non-Genl Fund	5	3.50	57	47.00	2	6.00
06/30/2022	✓	General Fund	2	1.50	140	108.50	3	10.00
		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.

Establish Position

Every employee requires a position with basic data (i.e., Position Number, Location, Reports To, Telework Eligibility)

→

Enter Personal Data

Personal data record captures identifying employee data (i.e., Employee ID, Name, SSN, Address, Legal Gender, Ethnicity)

→

Job Data Link Position and Personal

The position and personal data are linked with additional job data (i.e., Paygroup, Compensation, Employee Class, Eligibility Group)

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 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

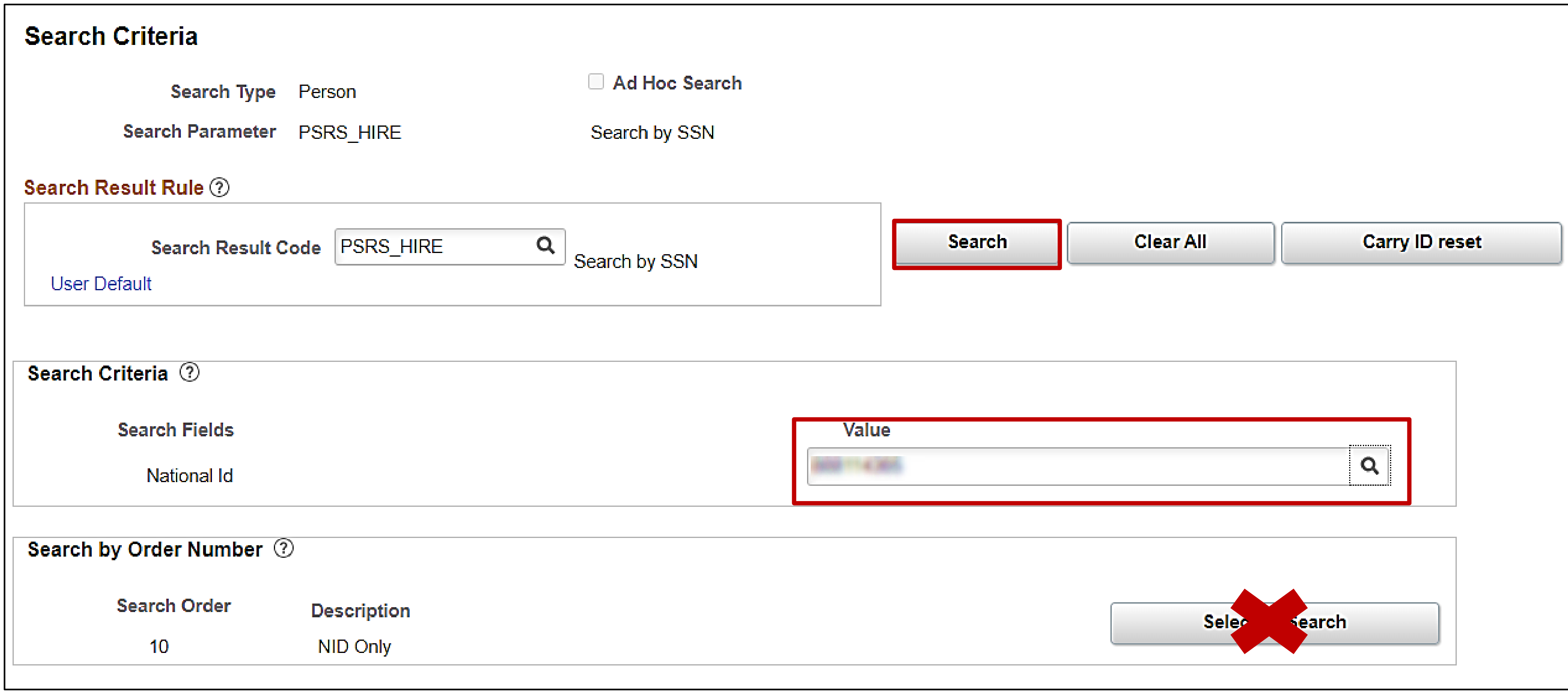
Prior to entering a new hire or rehire, the Agency HR Administrator performs a Search Match using the employee's SSN to determine if the person already exists in Cardinal or to capture their employee ID.

- 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)

Note: 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**.

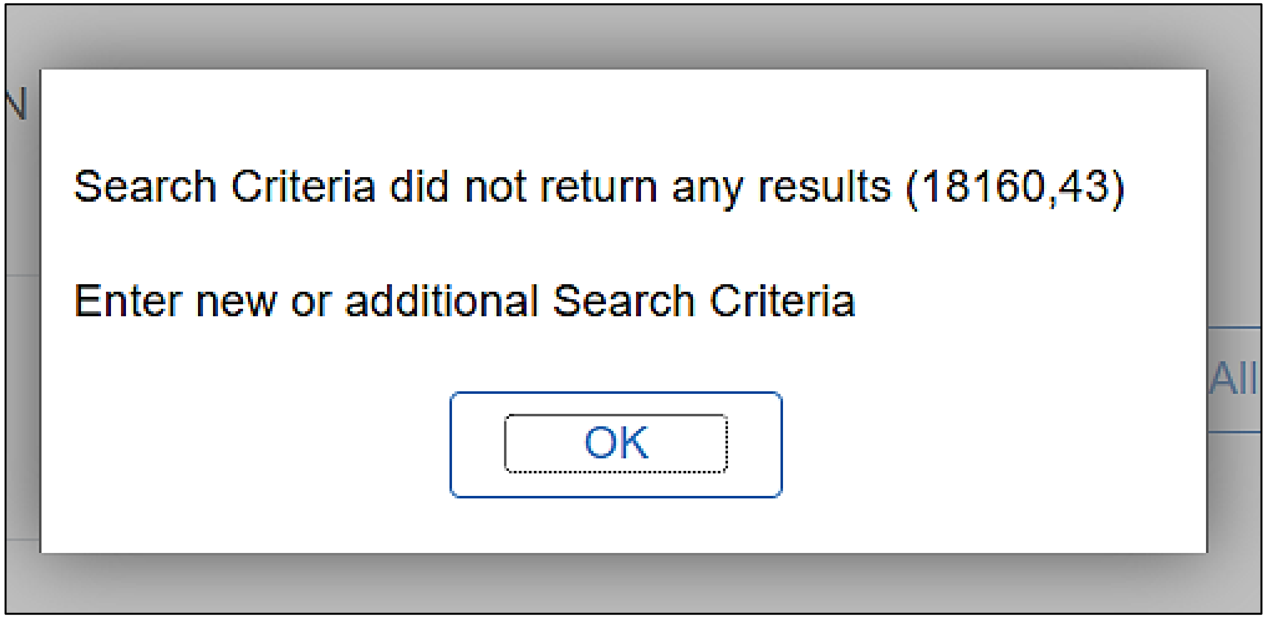
Search Match uses Social Security Number

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



Search Match – No Match

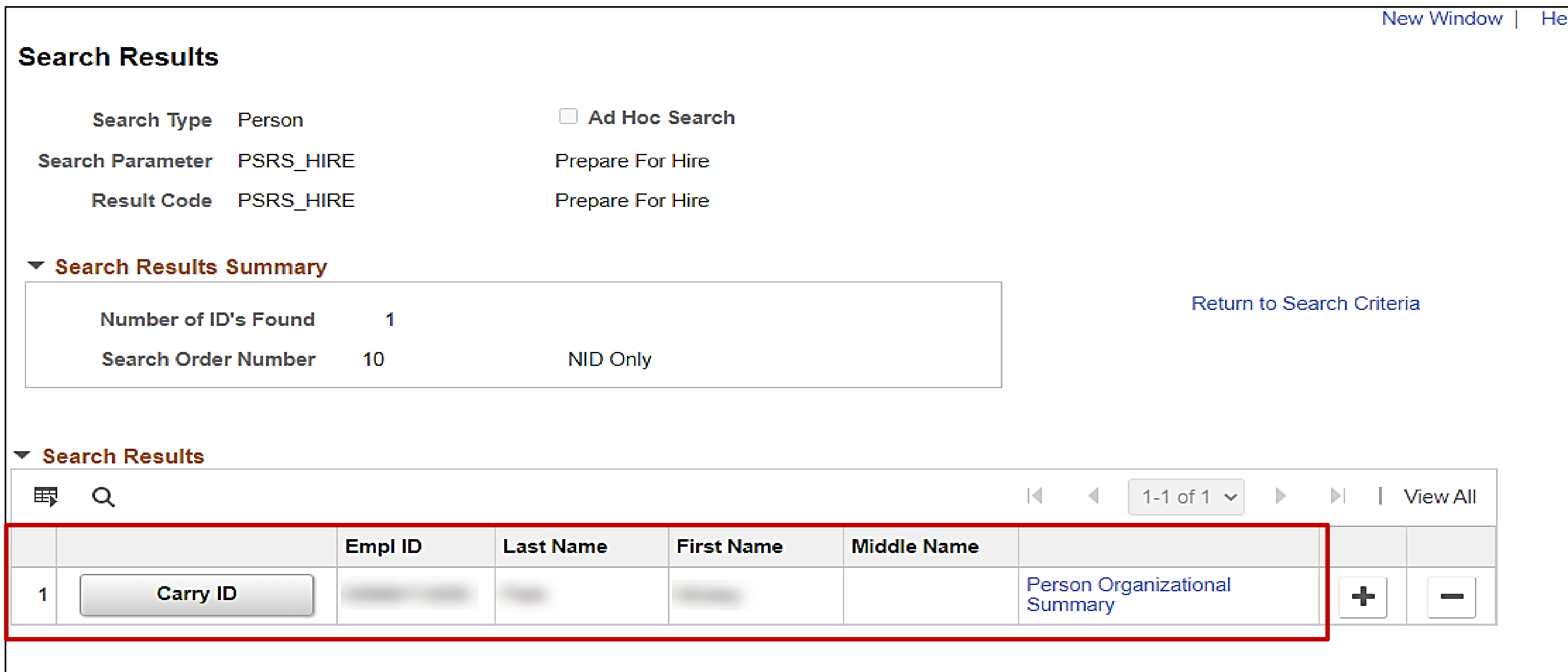
When there is no match, a message displays indicating Search Criteria did not return any results. This means the employee has not worked for the Commonwealth and the employee can be entered through the **Add a Person** process in Cardinal.



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
- Click the **Person Organizational Summary** link.



Person Organizational Summary - with Job Data in Cardinal

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

1 of 1 | View All

ORG Instance	0	Last Hire	07/25/2019	Termination Date	10/08/2024
HR Status	Inactive	Payroll Status	Terminated		

Assignments

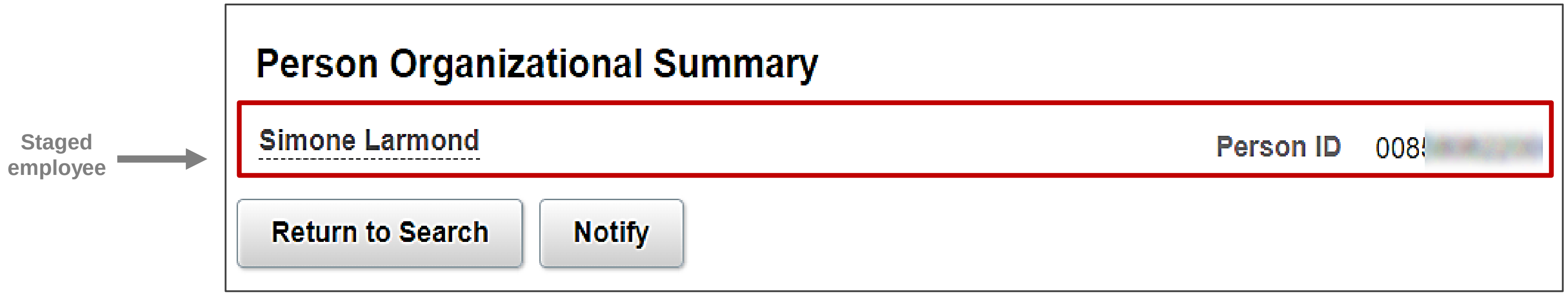
1-1 of 1

Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Action	Action Reason	Job Code	Grade	Benefits Status
0	Inactive	Terminated	10/09/2024	14000	07/25/2019	Classified Salary	10/08/2024	Termination	Resignation	19212	5	Terminated

Return to Search | Notify

Person Organizational Summary - 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.



Scenario 1:	**Scenario 2:**
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.

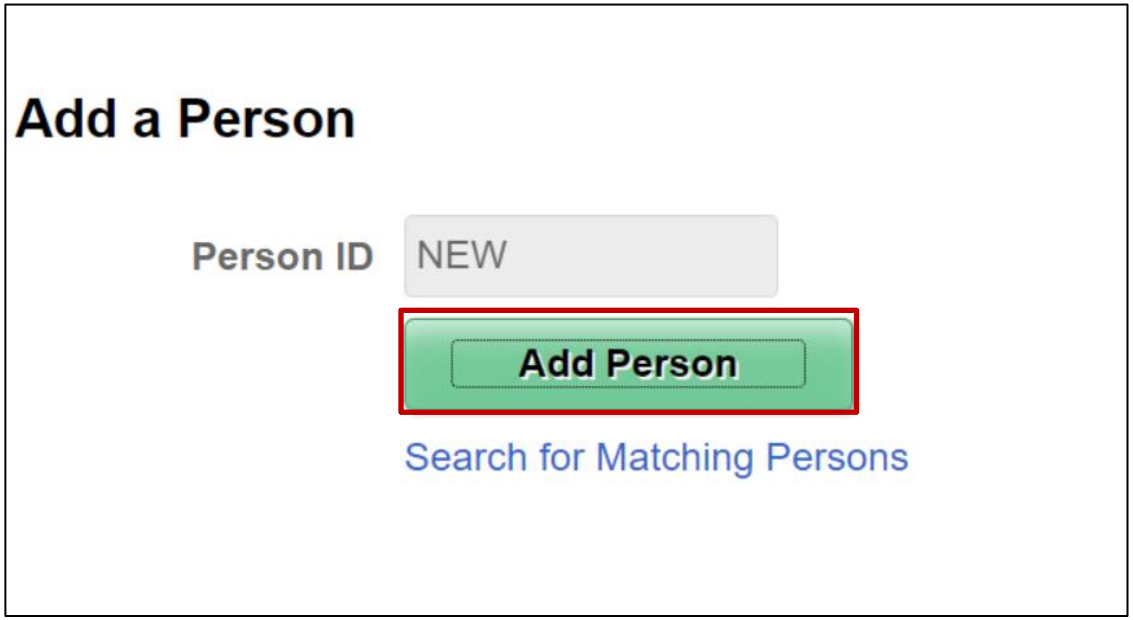
The **New Employment Instance** menu option is used in both scenarios to add an employee record to hire the employee. This process will be reviewed in the next lesson.

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.

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



For details on entering a new hire, see the job aid titled **HR351_Creating a New Hire** located on the Cardinal website in **Job Aids** under **Learning**.

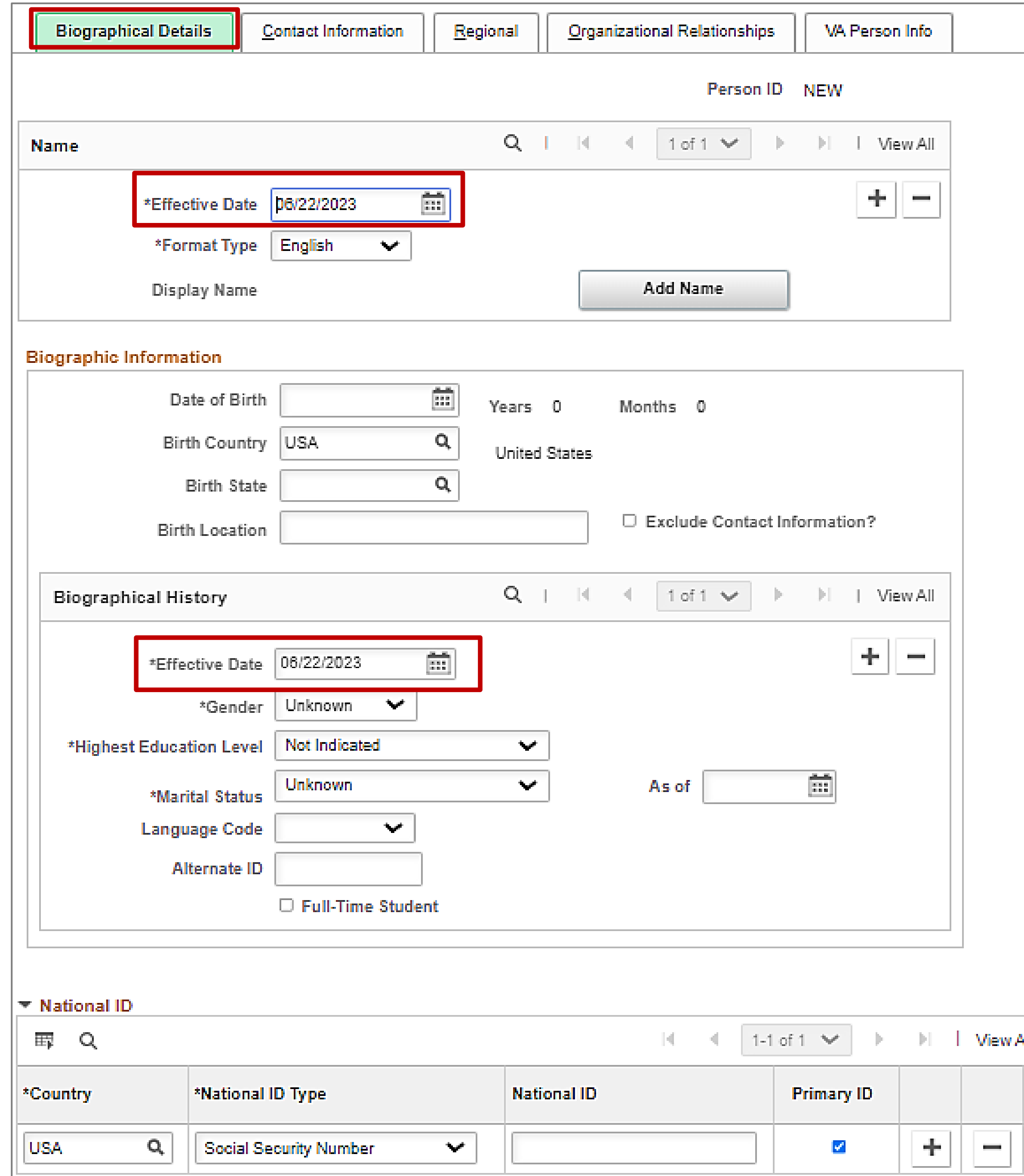
Biographical Details Tab

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**

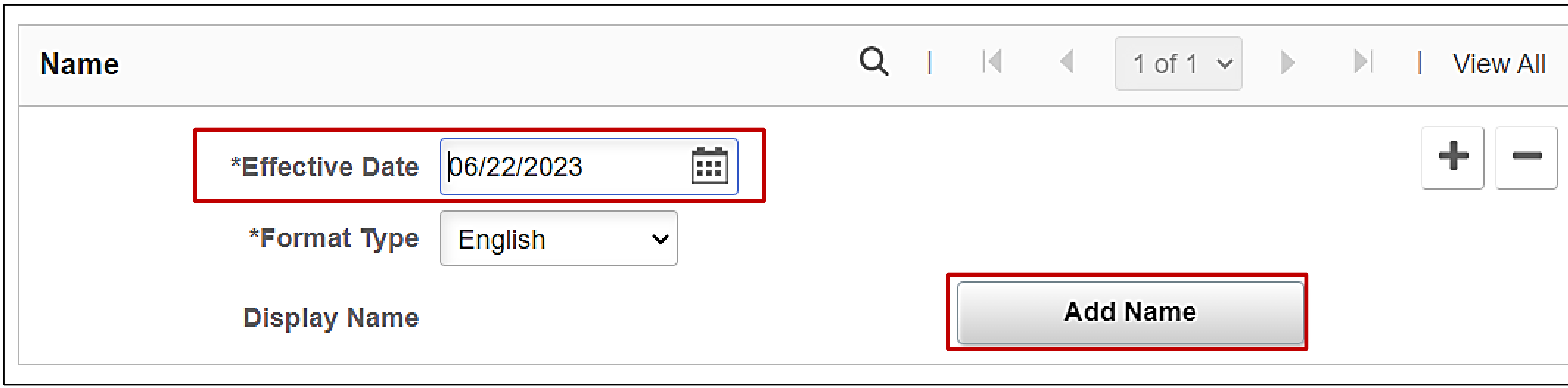


Biographical Details Tab - Name

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

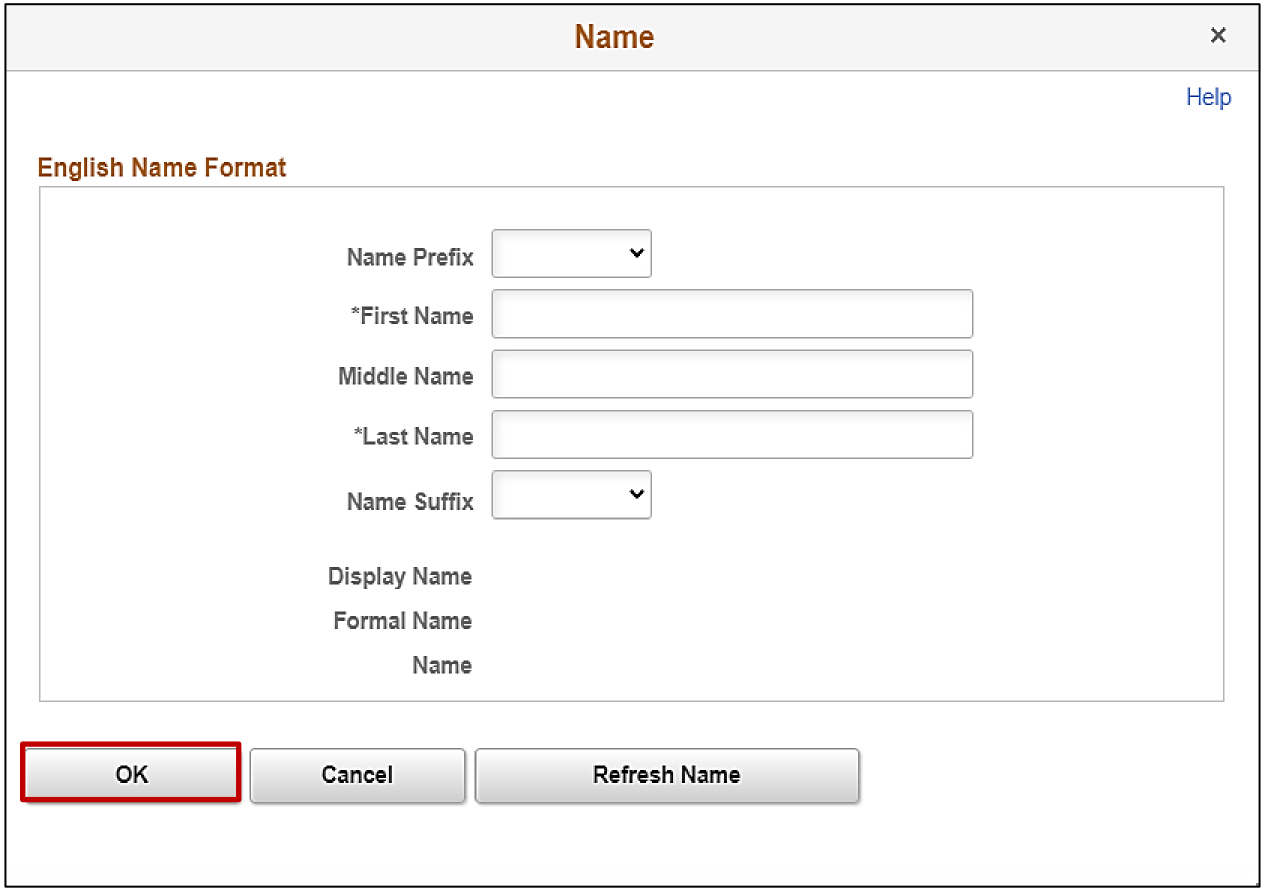
- **Effective Date**: enter the date this person becomes effective in Cardinal.

  Note: This date cannot be prior to the effective date on position that the employee is being hired.



Biographical Details Tab - Name (continued)

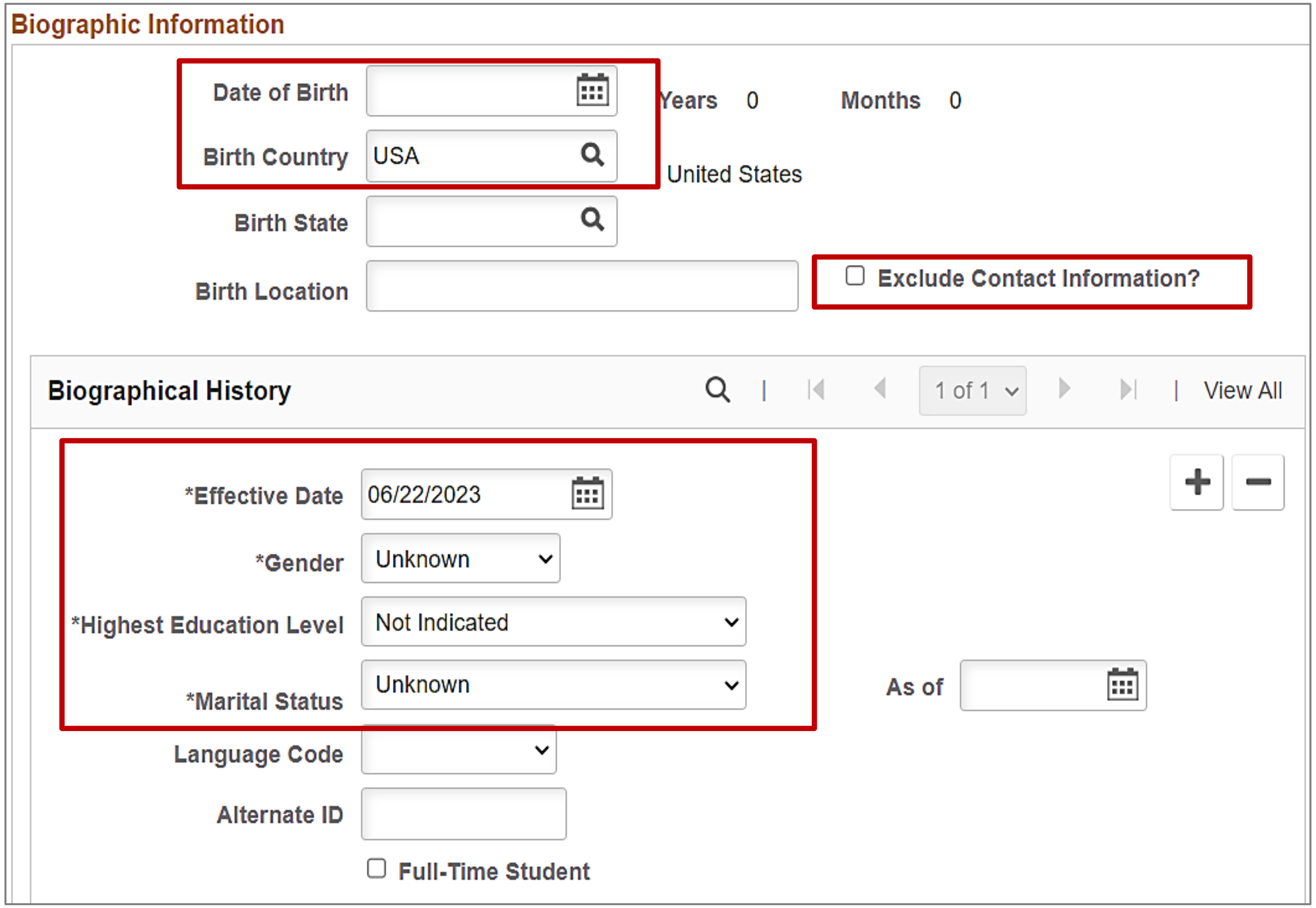
- **Name Prefix**: Use drop down option to select
- ***First Name**: Required field
- **Middle Name**: Do not enter a period if only using initial
- ***Last Name**: Required field
- **Name Suffix**: Use drop down option to select



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

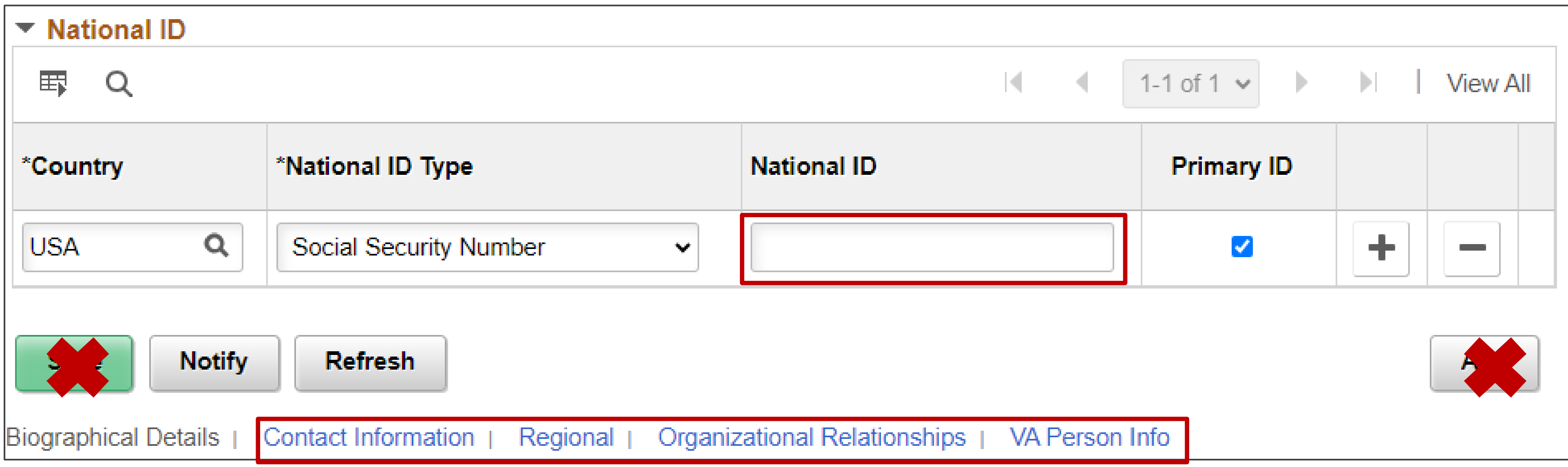
Biographical Details Tab – Biographical History

- **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



Biographical Details Tab – National ID

- **National ID** field is required for all employees and is where the Social Security Number (SSN) is entered.
- Employees without an 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.

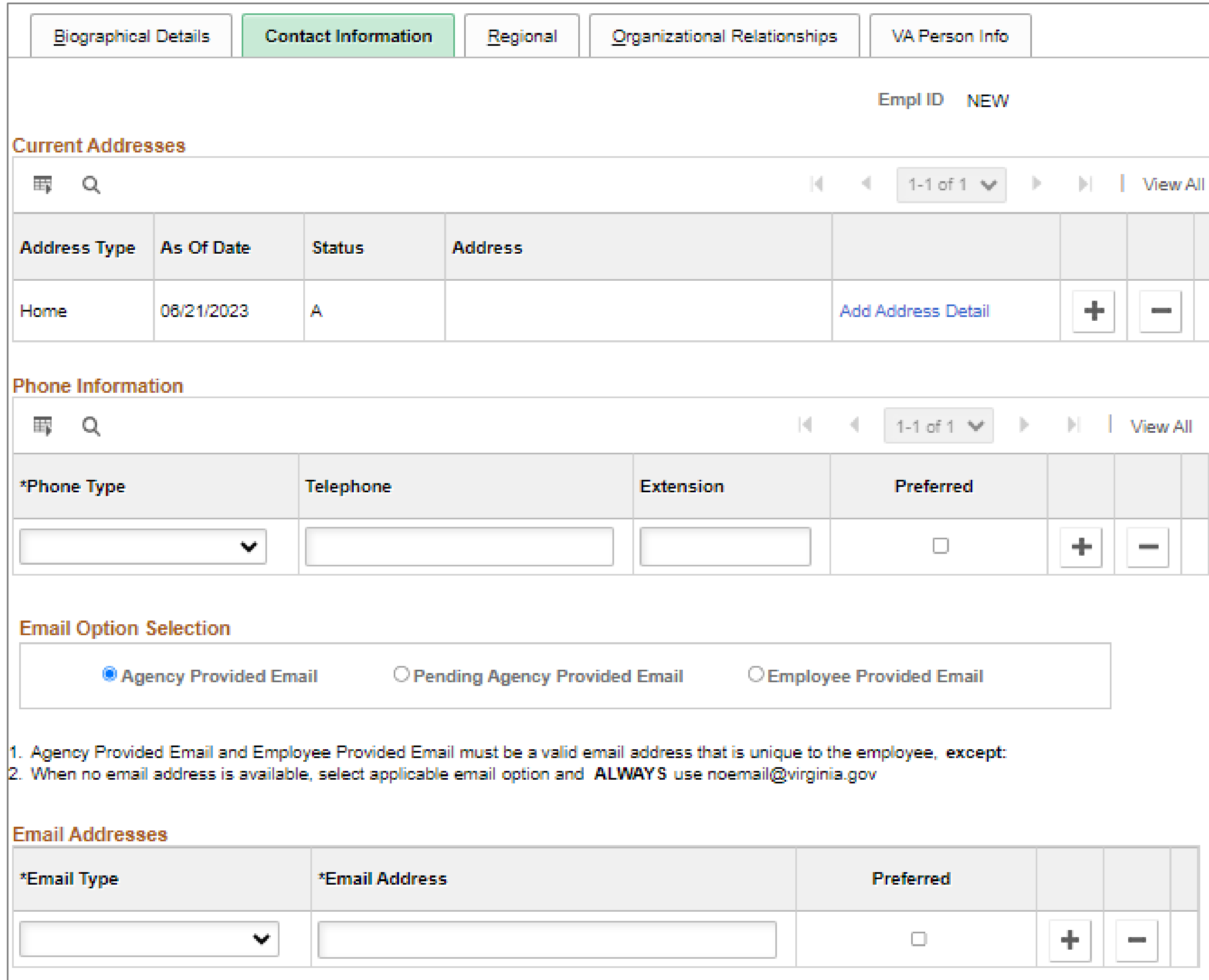


- Do NOT click the **Save** button until very end.
- Navigate to the next tab using the links at the bottom or tabs at the top of the page.

Contact Information Tab

This tab contains the following information:

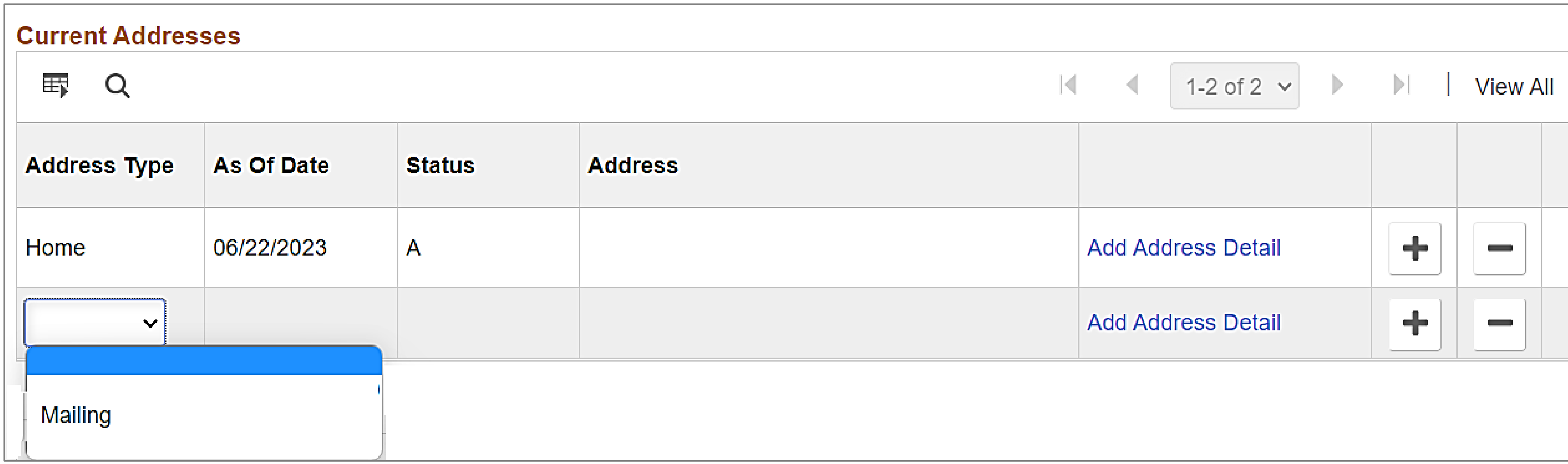
- **Current Addresses**: current and historical
- **Phone Information**
- **Email Option Selection**
- **Email Addresses**



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



Employee's addresses can be updated either by the:

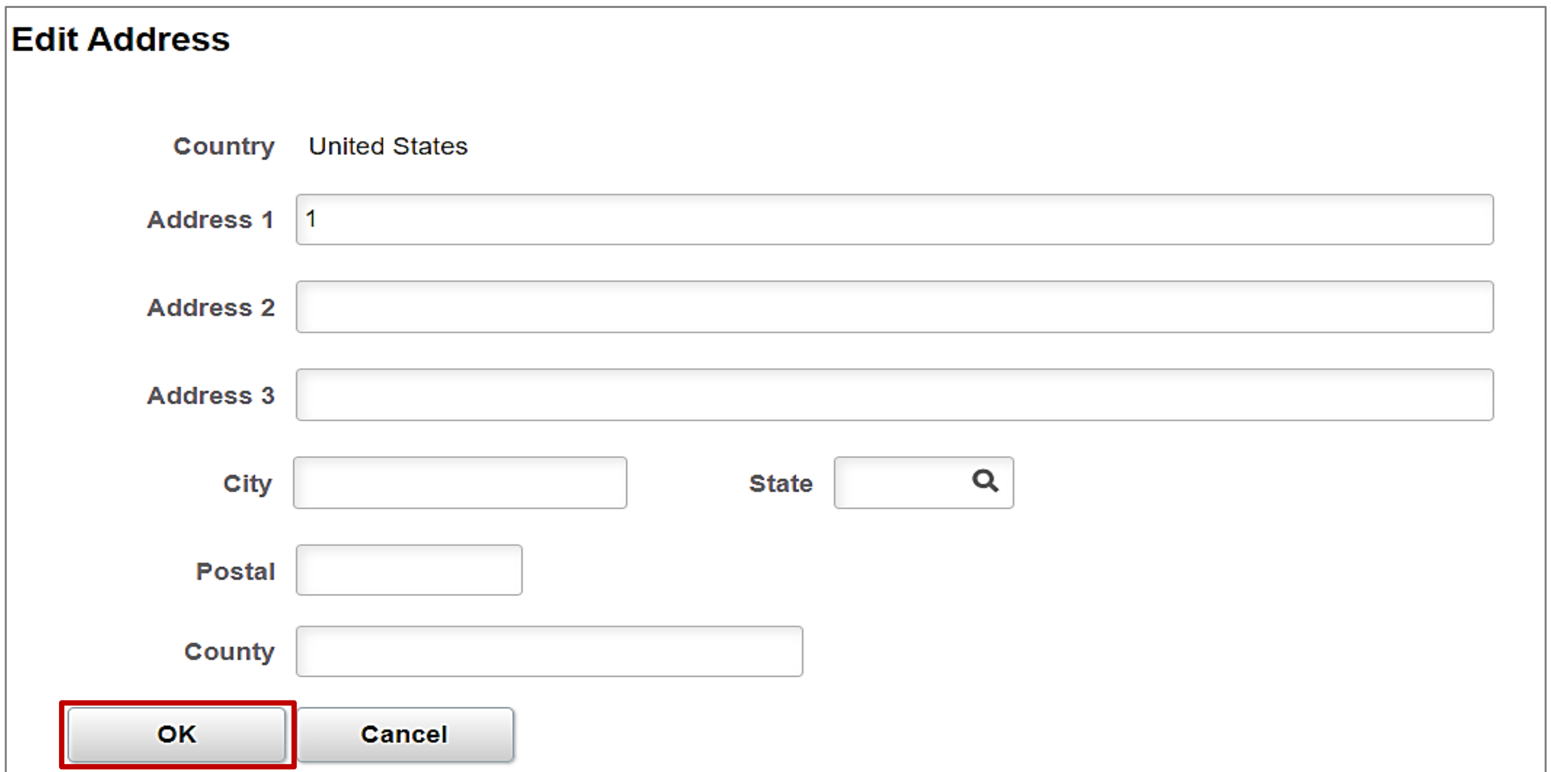
- HR Administrator
- Employee via Employee Self Service

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.



Contact Information Tab – Edit/View Address Detail

The Current Addresses 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 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.

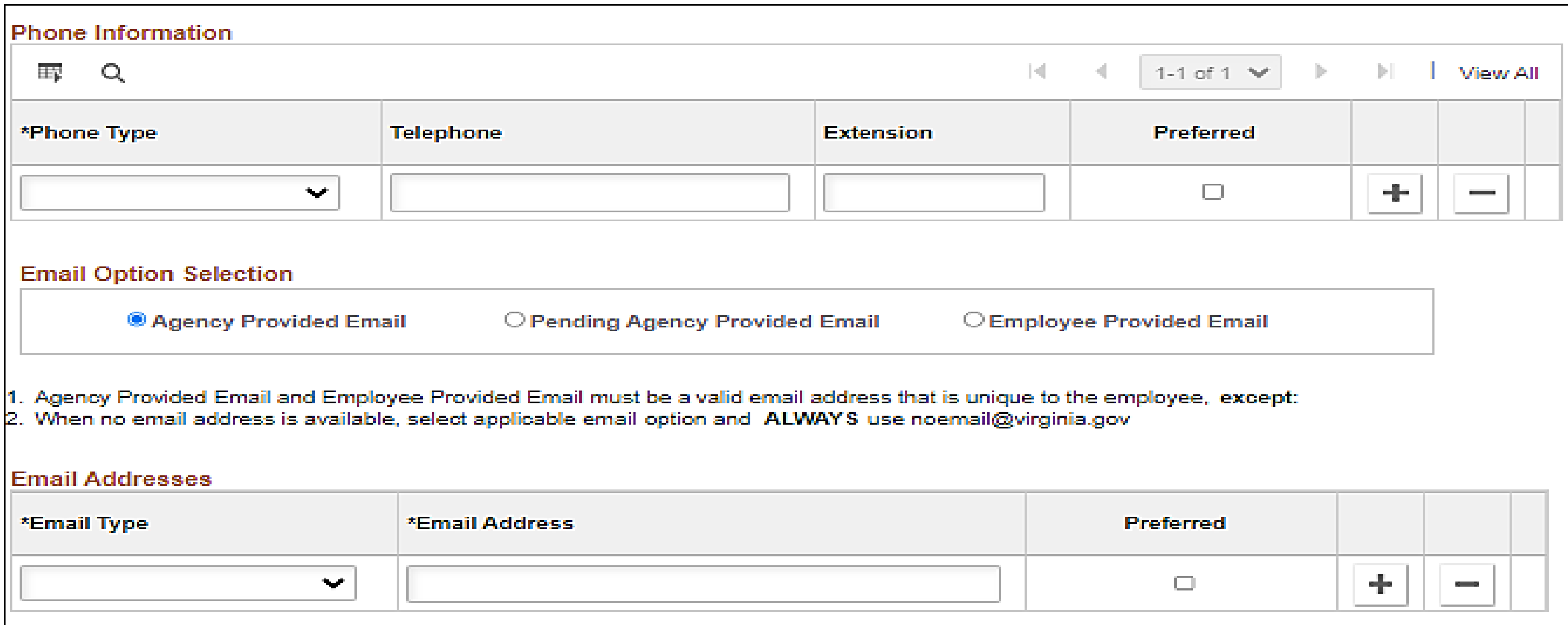
Contact Information Tab – Phone and Email

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



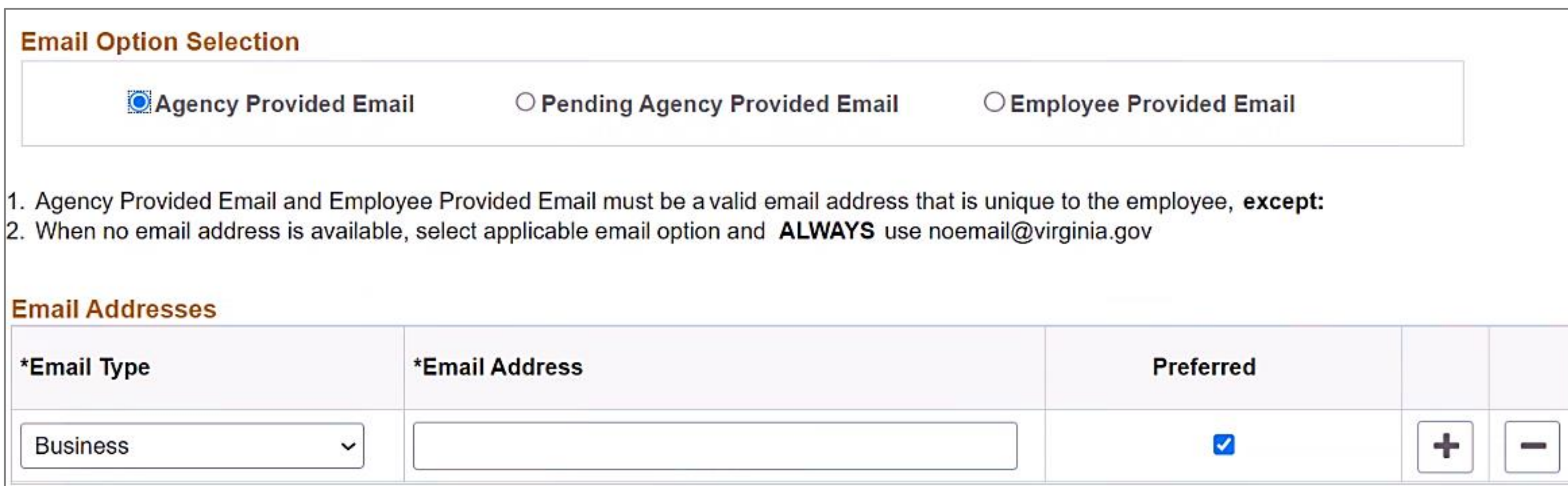
Contact Information Tab – Phone and Email (continued)

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.

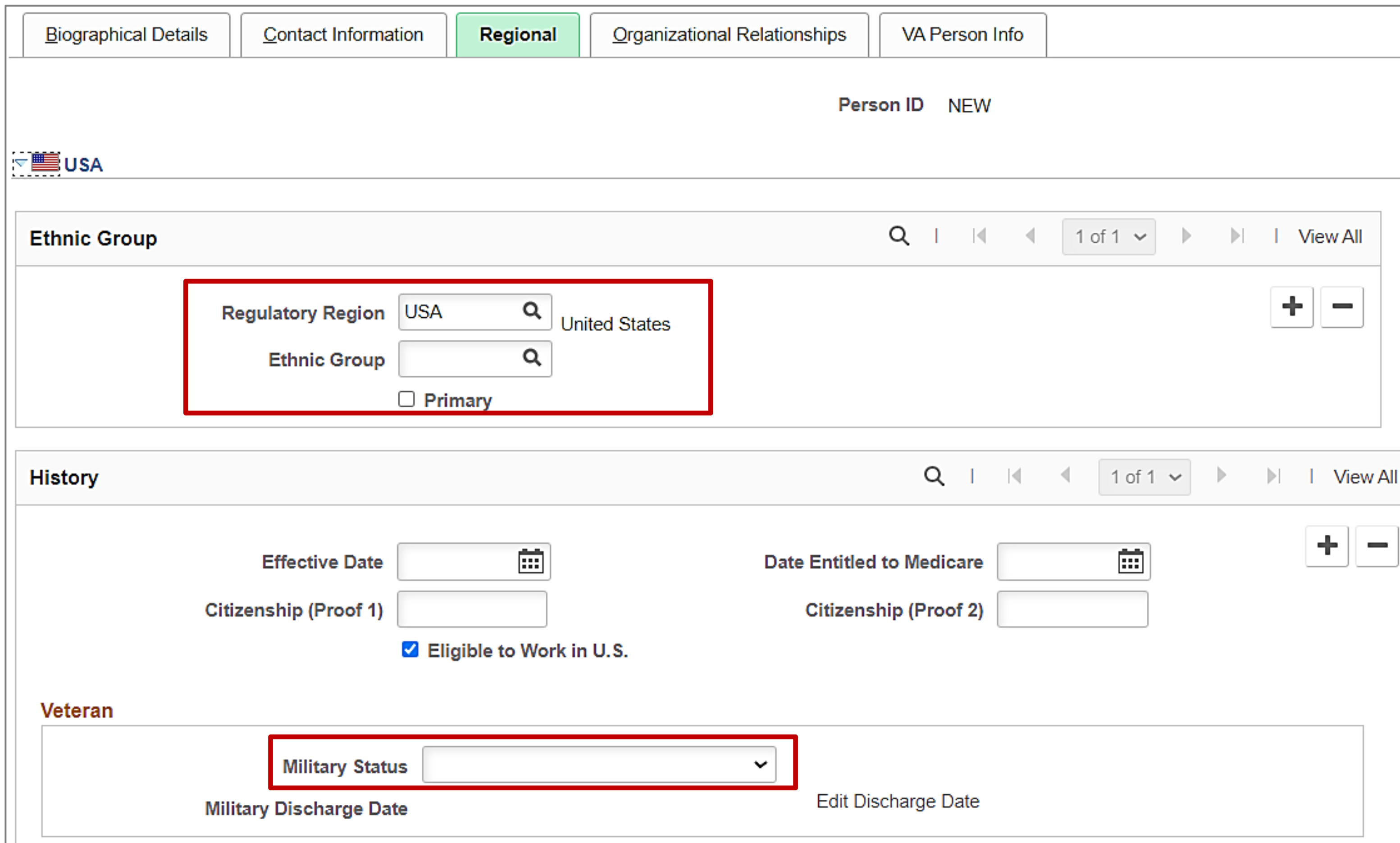
- **Email Type**: options are either Business or Personal
- **Email Address**: the placeholder email address of noemail@virginia.gov must be used with the Pending Agency Provided Email option.
- **Preferred**: only one email address can be selected as preferred. The preferred email is used by vendors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



Regional Tab – Ethnic Group and Veteran

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

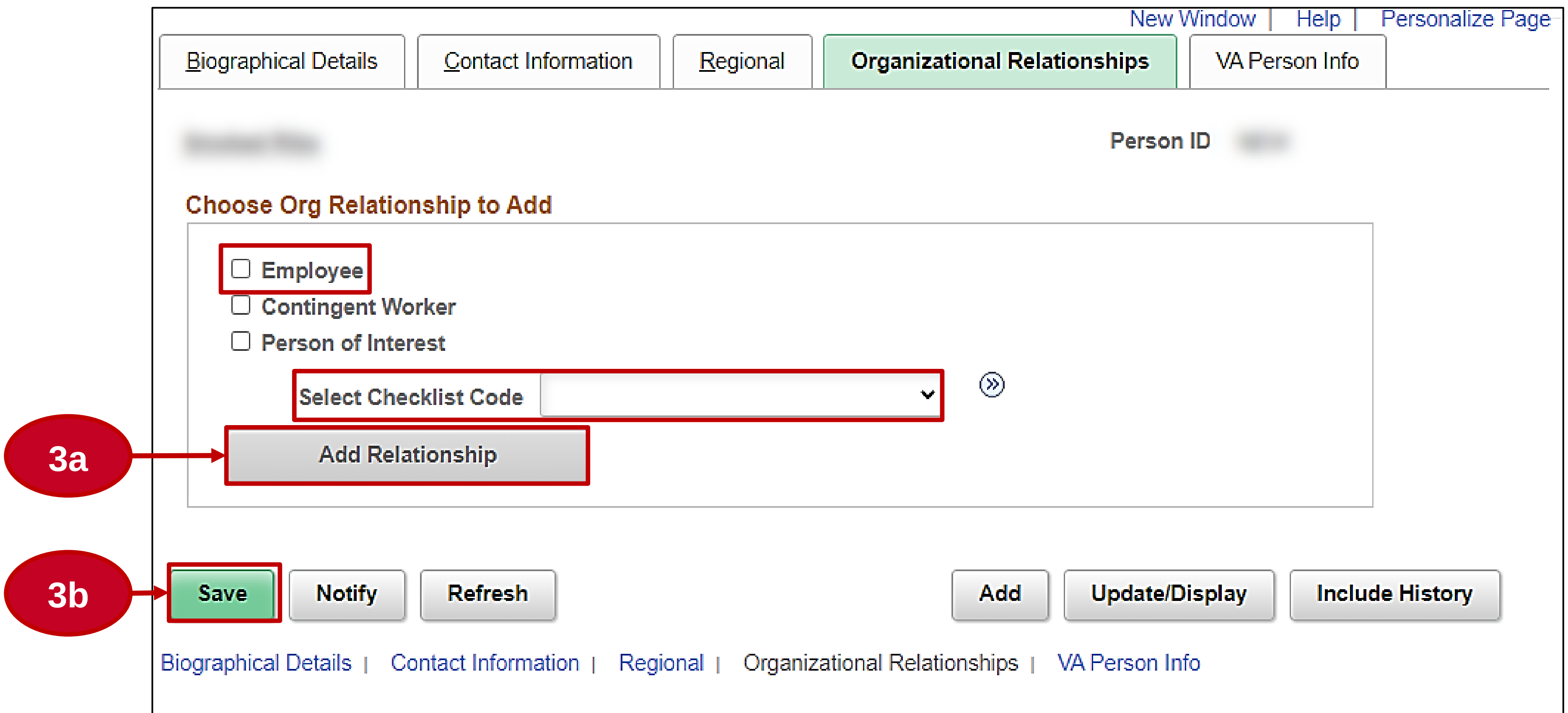
- HR Administrator
- Employee via Employee Self Service



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)



Other Personal Information

Below are a list of other Personal Data pages that are not required for the Hire process and can be completed later. If you have the information at the time of hire, it should be completed.

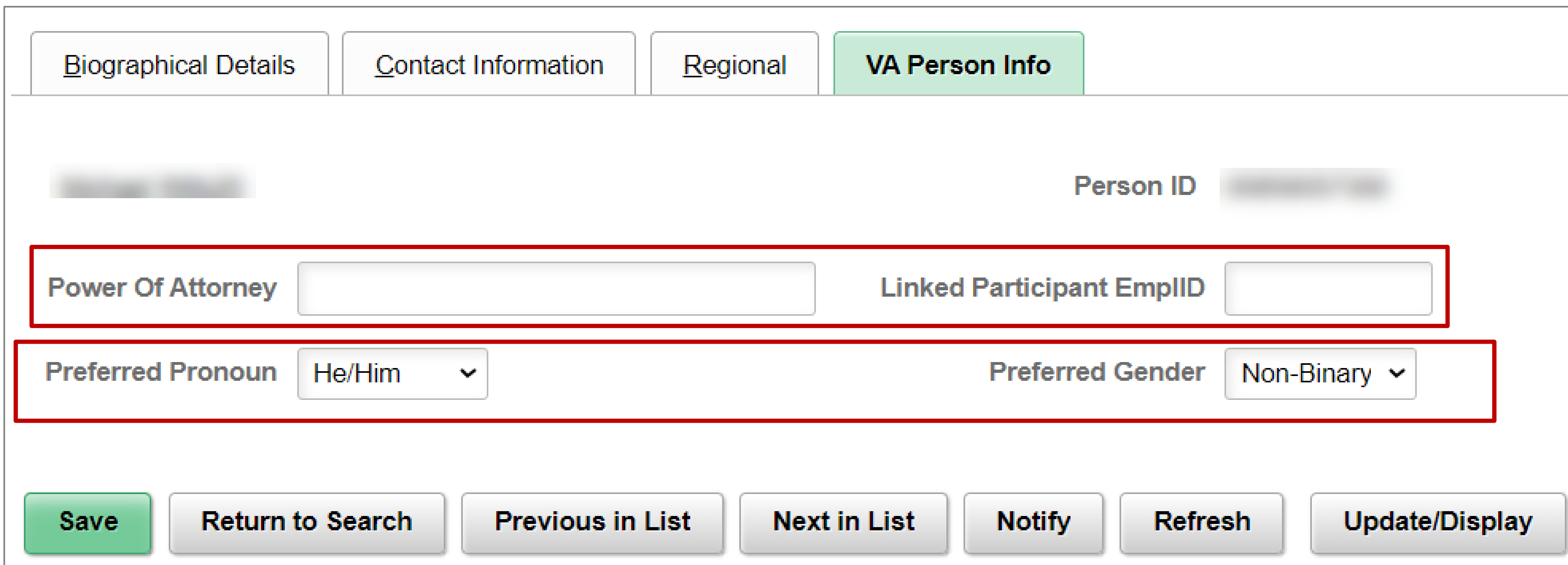
It includes:

- VA Person Info tab
- Emergency Contacts
- Disability

VA Person Info tab

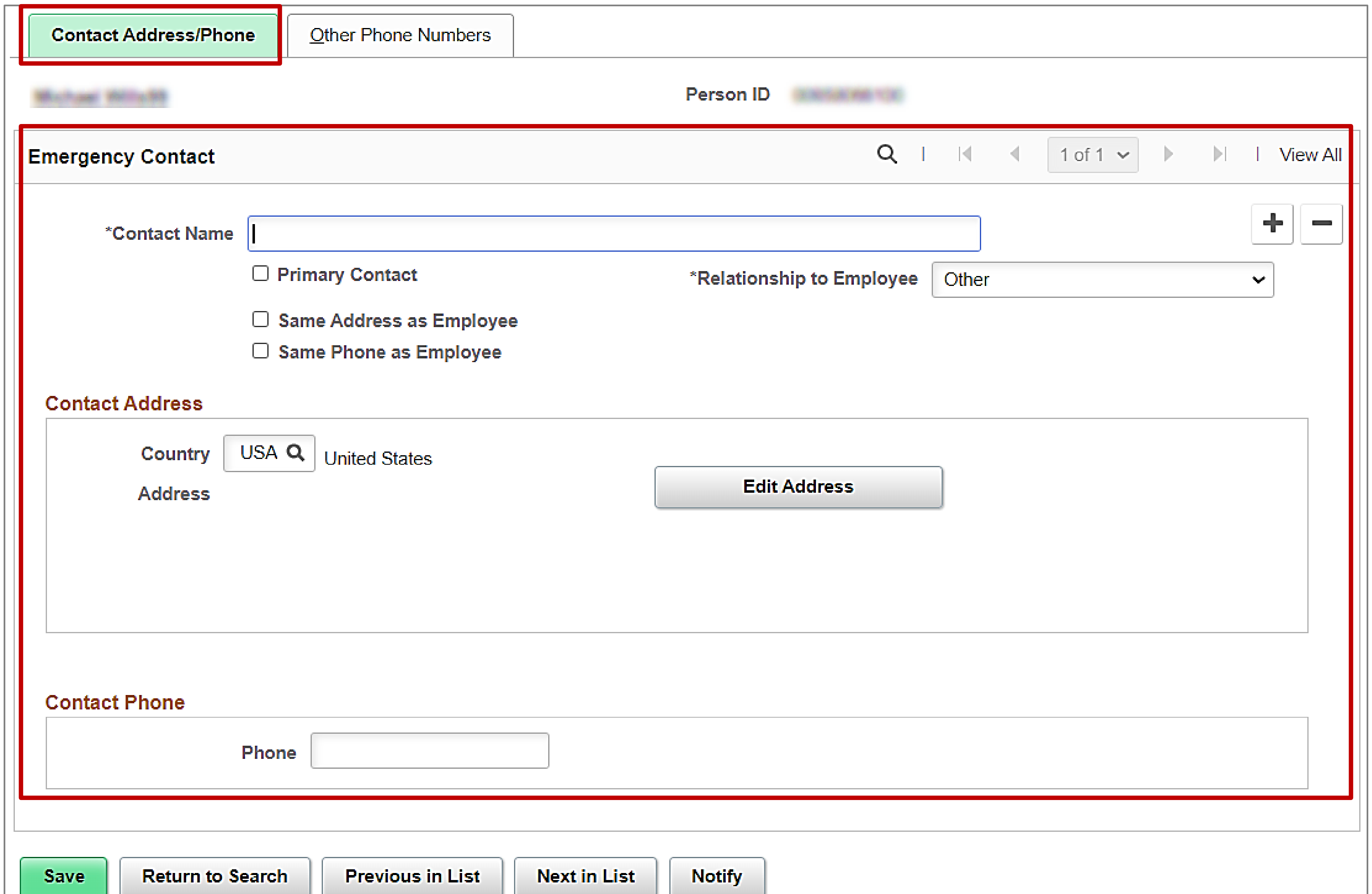
Information on this tab can be completed after hiring the employee.

- **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

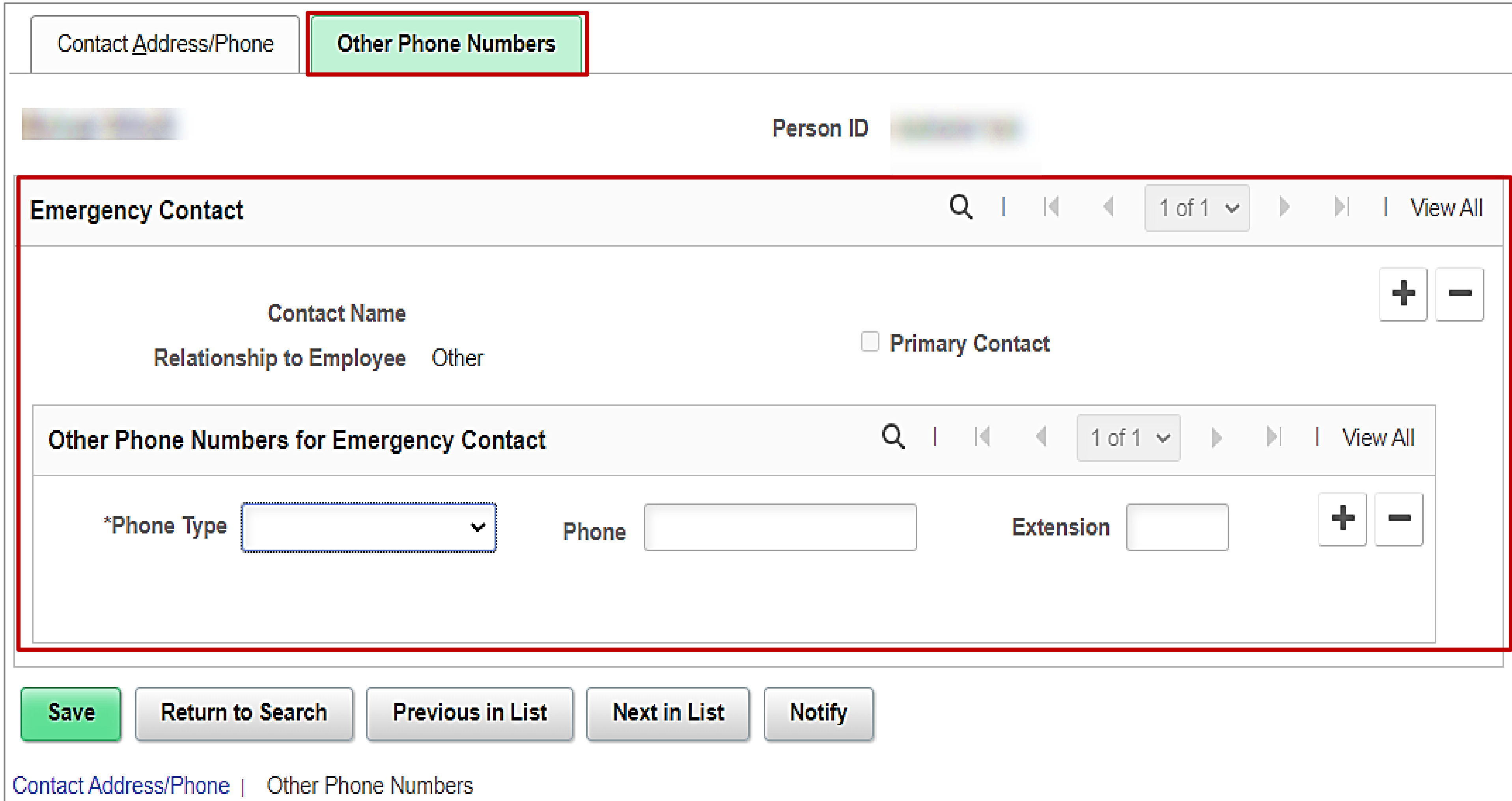


Emergency Contacts – Contact Address/Phone tab

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

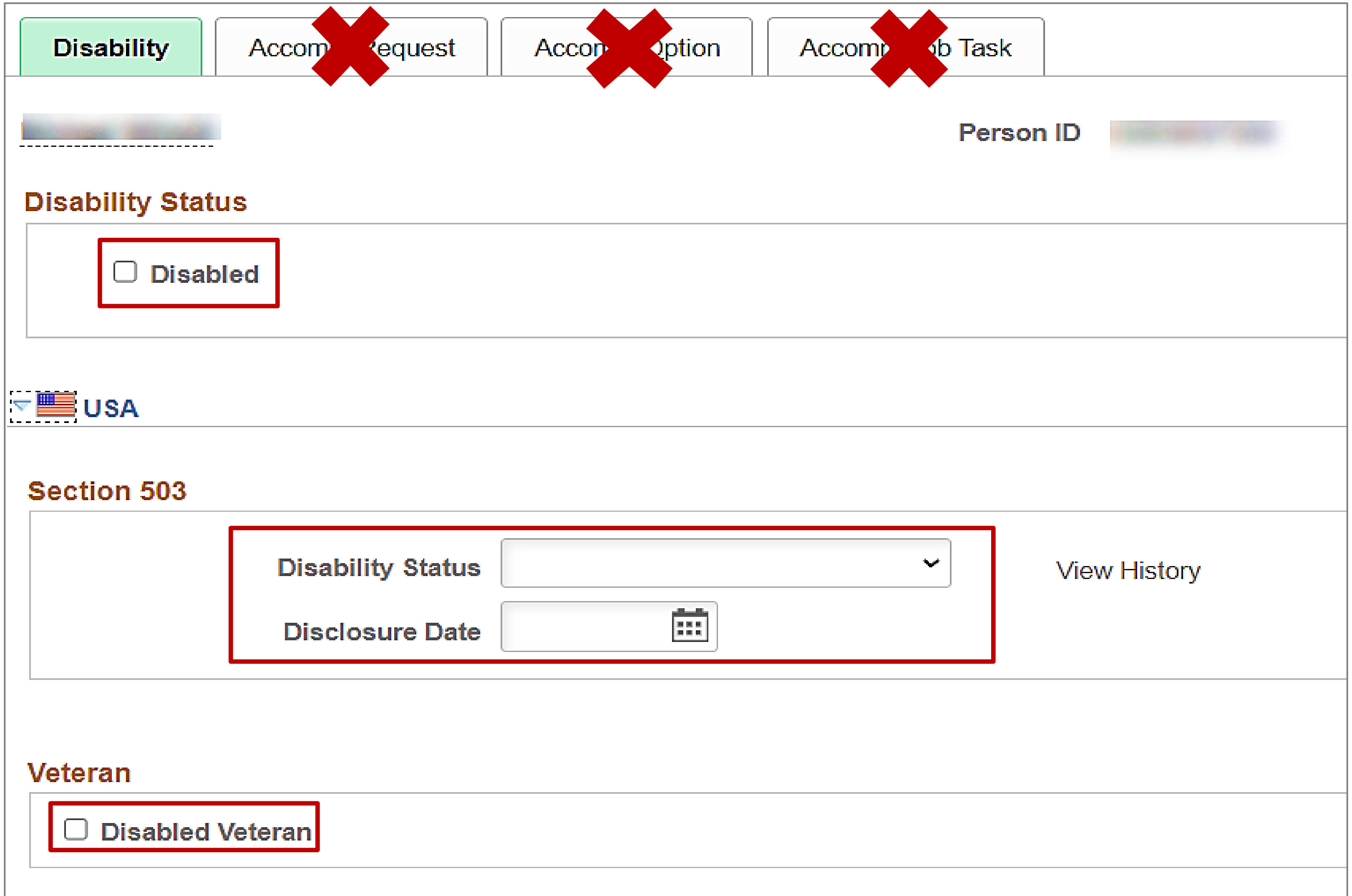


Emergency Contacts – Other Phone Numbers tab



Managing Disability Information – Disability tab

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



Demonstration

In this demonstration, the instructor will demonstrate the following:

- Perform a Search Match and add employee Personal Data only

Hands-On Exercise

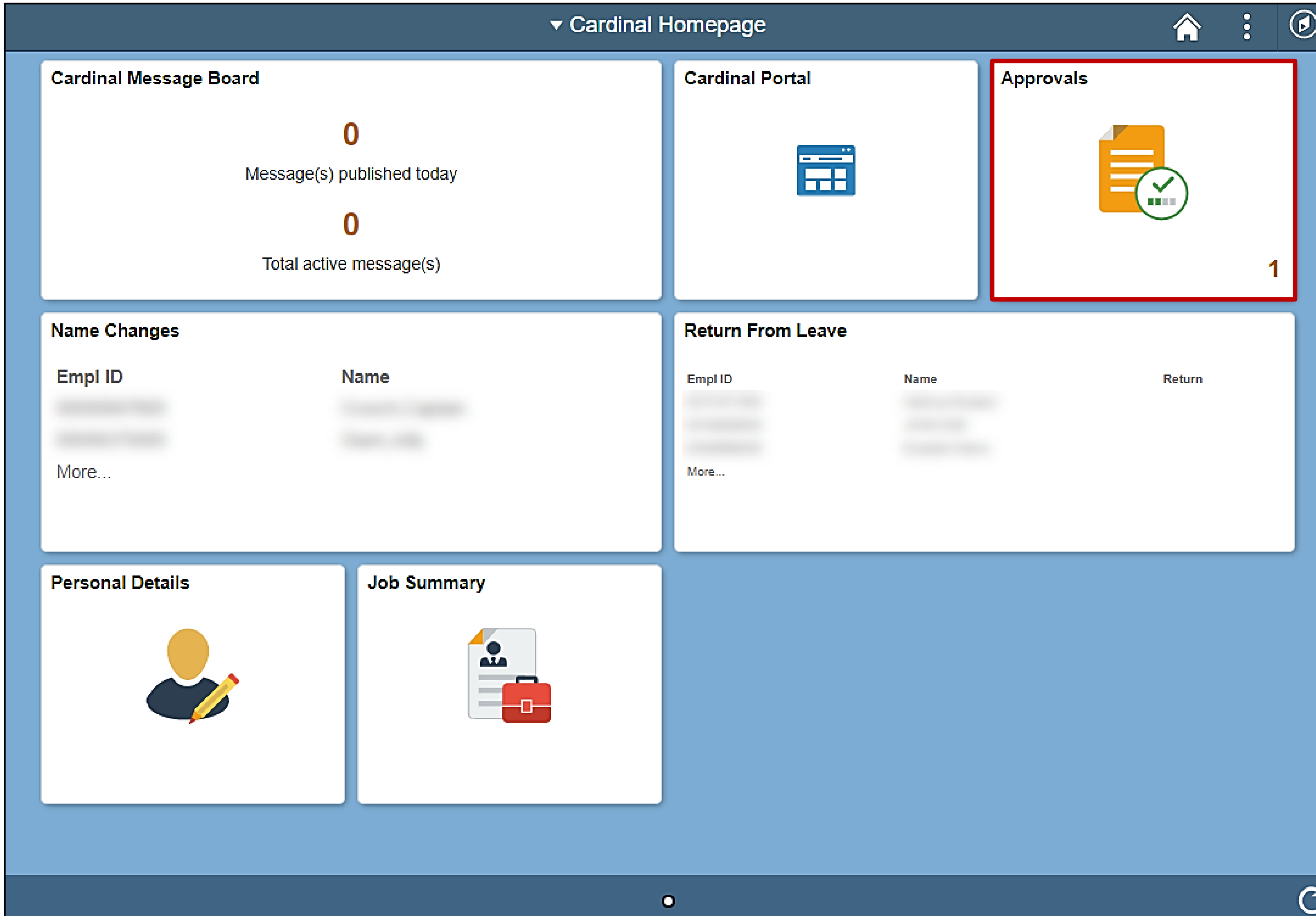
Now you have an opportunity to practice the lessons learned today in a training environment.

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 – Name Changes

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



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

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.

Establish Position

Every employee requires a position with basic data (i.e., Position Number, Location, Reports To, Telework Eligibility)

Enter Personal Data

Personal data record captures identifying employee data (i.e., Employee ID, Name, SSN, Address, Legal Gender, Ethnicity)

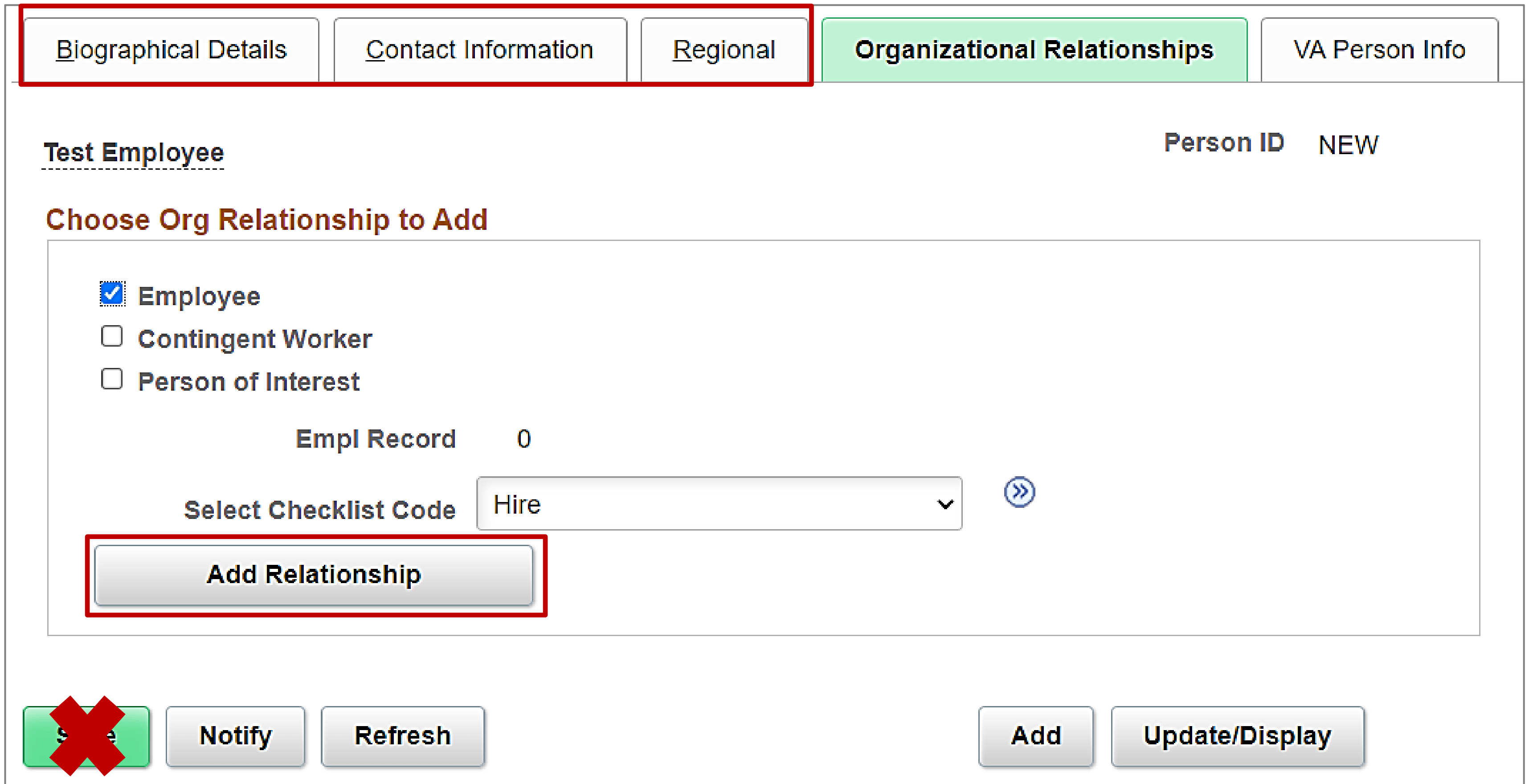
Job Data
Link Position and Personal

The position and personal data are linked with additional job data (i.e., Paygroup, Compensation, Employee Class, Eligibility Group)

Hiring an Employee – Add Org Relationship

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

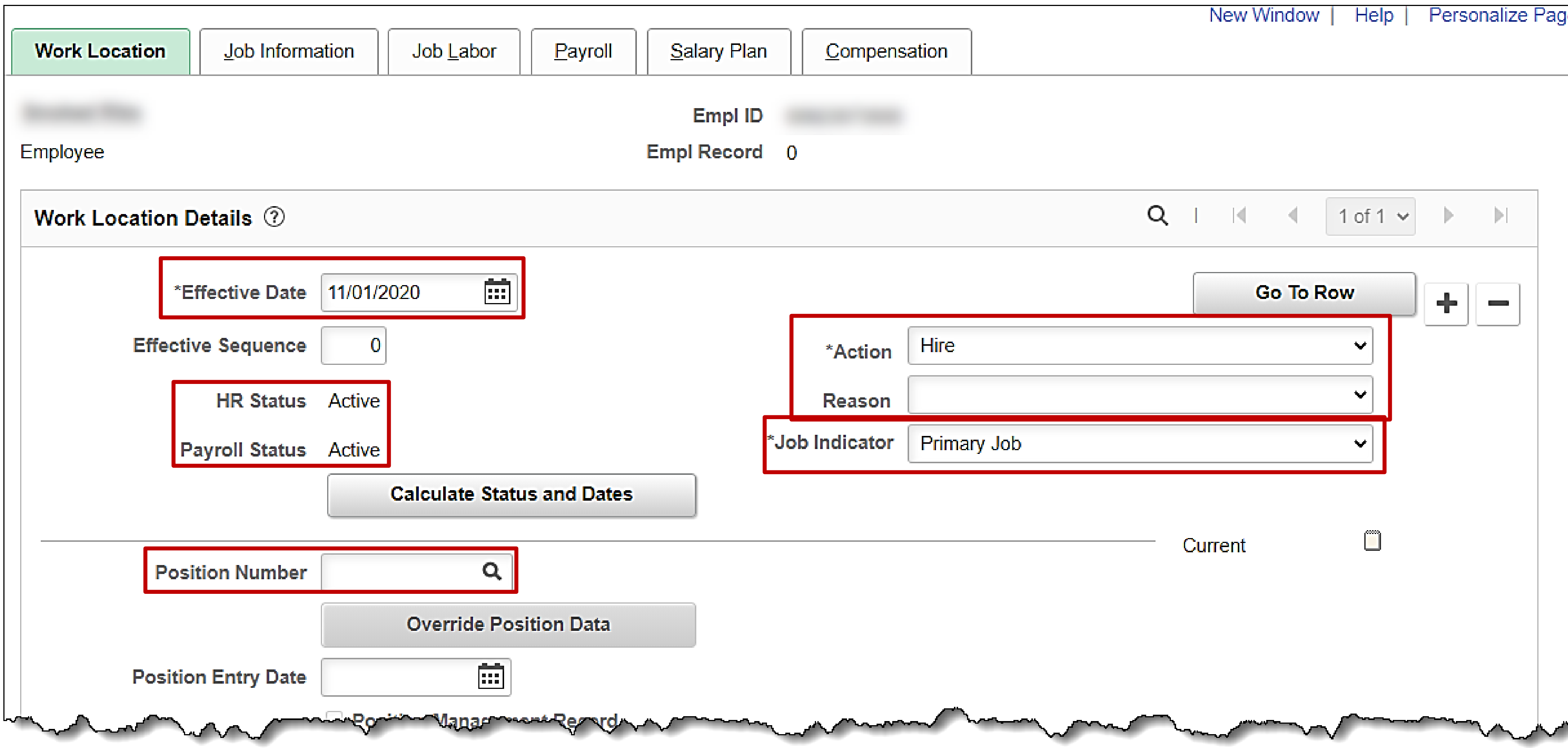
- It verifies that all required personal data is entered.
  - If not, a message will display identifying the required information that is missing.
- Click the tabs to go back to enter missing information; DO NOT CLICK THE BROWSER BACK BUTTON.
- Click the **Add Relationship** button once missing information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



Hiring an Employee – Work Location tab

Job Data – Work Location

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



Hiring an Employee – Work Location tab (continued)

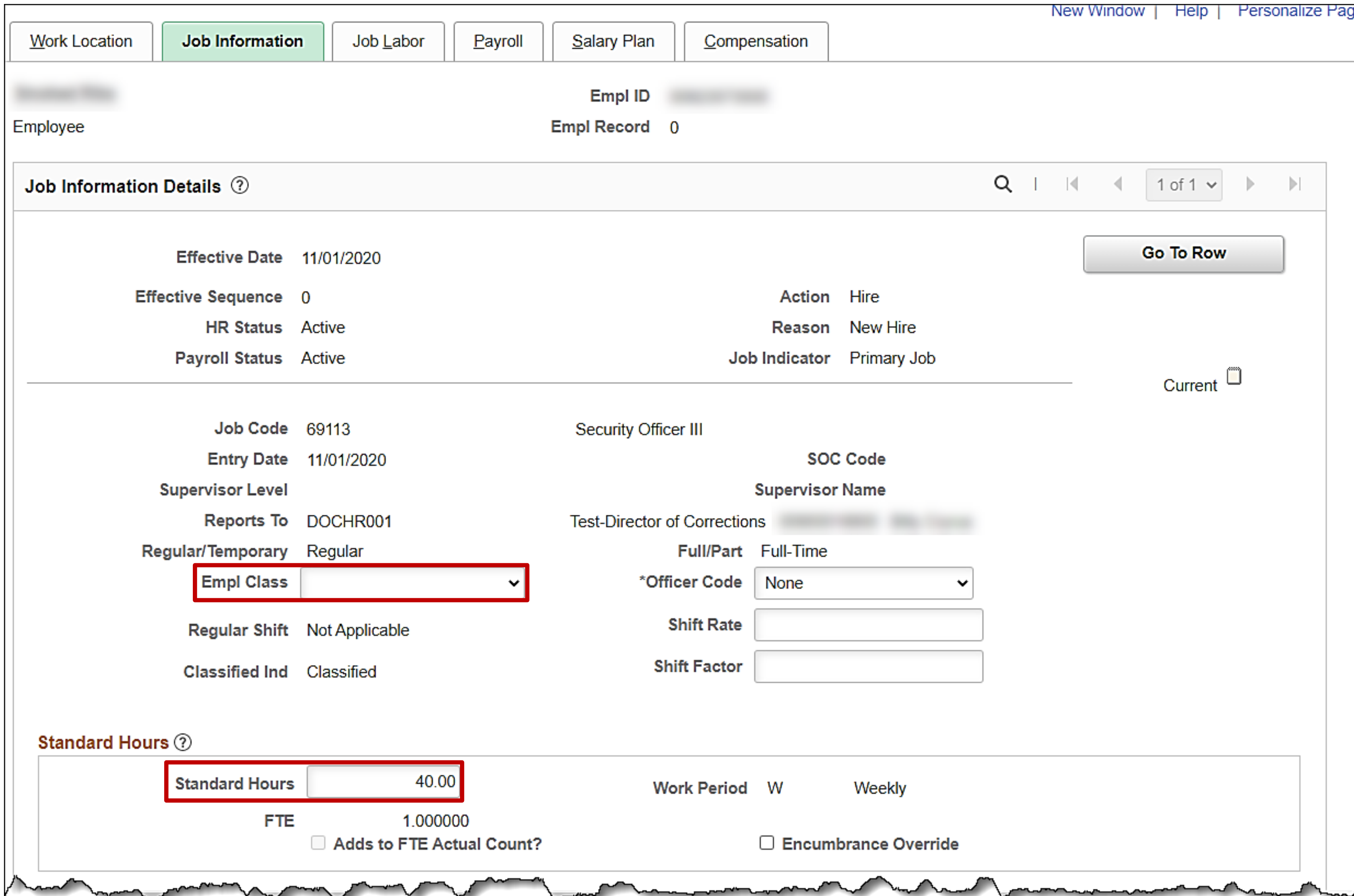
Key fields in this section:

- **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
- **Job Indicator** –This is a required field that defaults to Primary Job. If an employee is holding multiple positions, their salary position should be the primary job and their wage position should be the secondary job. The Primary Job is the job that will drive benefits.
- **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

Empl ID

Empl Record 0

Job Information Details

1 of 1

Go To Row

Effective Date 11/01/2020

Effective Sequence 0

Action Hire

HR Status Active

Reason New Hire

Payroll Status Active

Job Indicator Primary Job

Current

Job Code 69113 Security Officer III

Entry Date 11/01/2020

SOC Code

Supervisor Level

Supervisor Name

Reports To DOCHR001 Test-Director of Corrections

Regular/Temporary Regular

Full/Part Full-Time

Empl Class

***Officer Code** None

Regular Shift Not Applicable

Shift Rate

Classified Ind Classified

Shift Factor

Standard Hours

Standard Hours 40.00

Work Period W Weekly

FTE 1.000000

Adds to FTE Actual Count?

Encumbrance Override

Hiring an Employee – Job Information tab (continued)

Job Information Details
Key fields in this section:

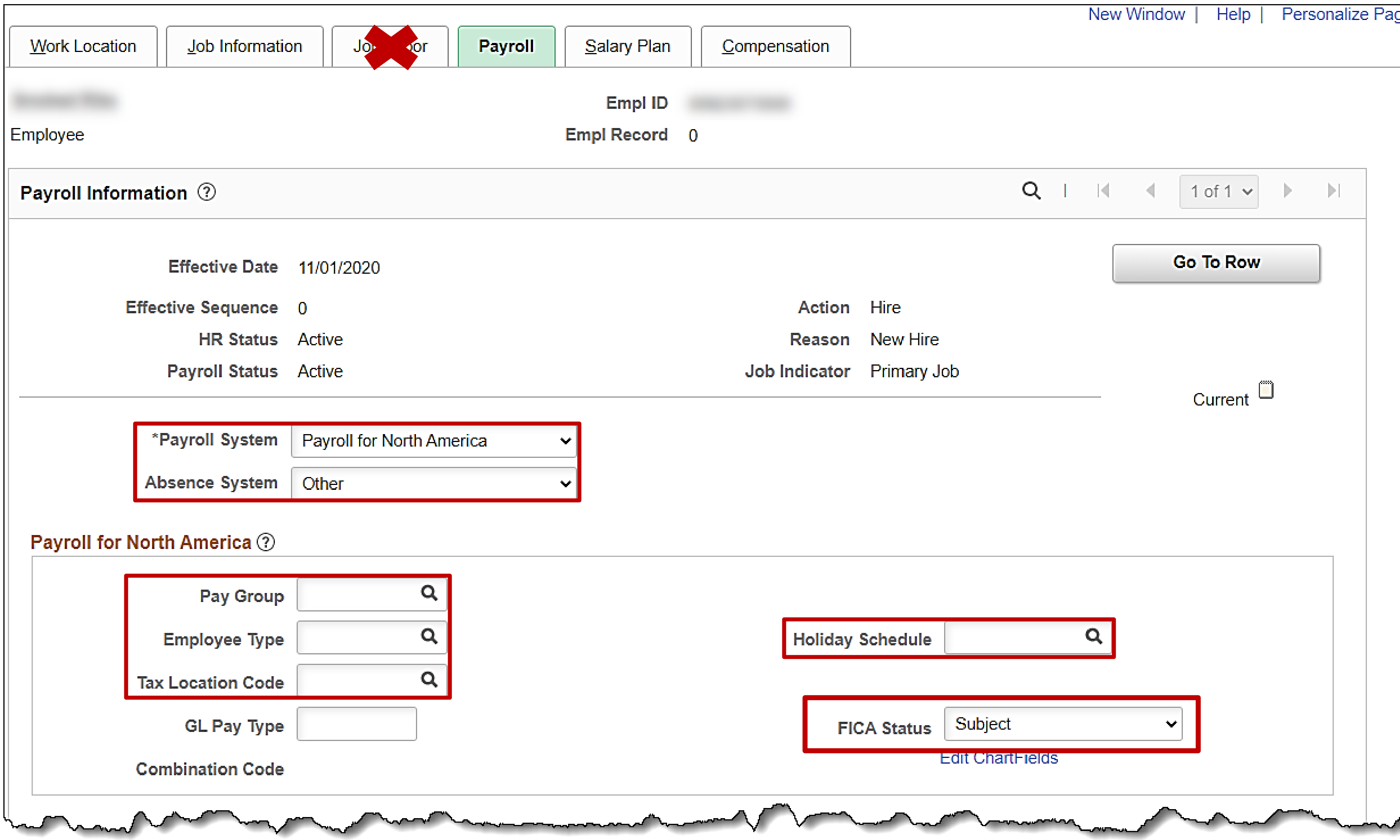
- **Empl Class** (Employee Classification) represents the different type of employees (i.e., Wage, Salaried, Adjunct, Valor, etc.)
  - Many options are dependent upon the Empl Class selected (i.e., the semi-monthly pay group of SM1 is not available for wage employees)

- **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



Hiring an Employee – Payroll tab (continued)

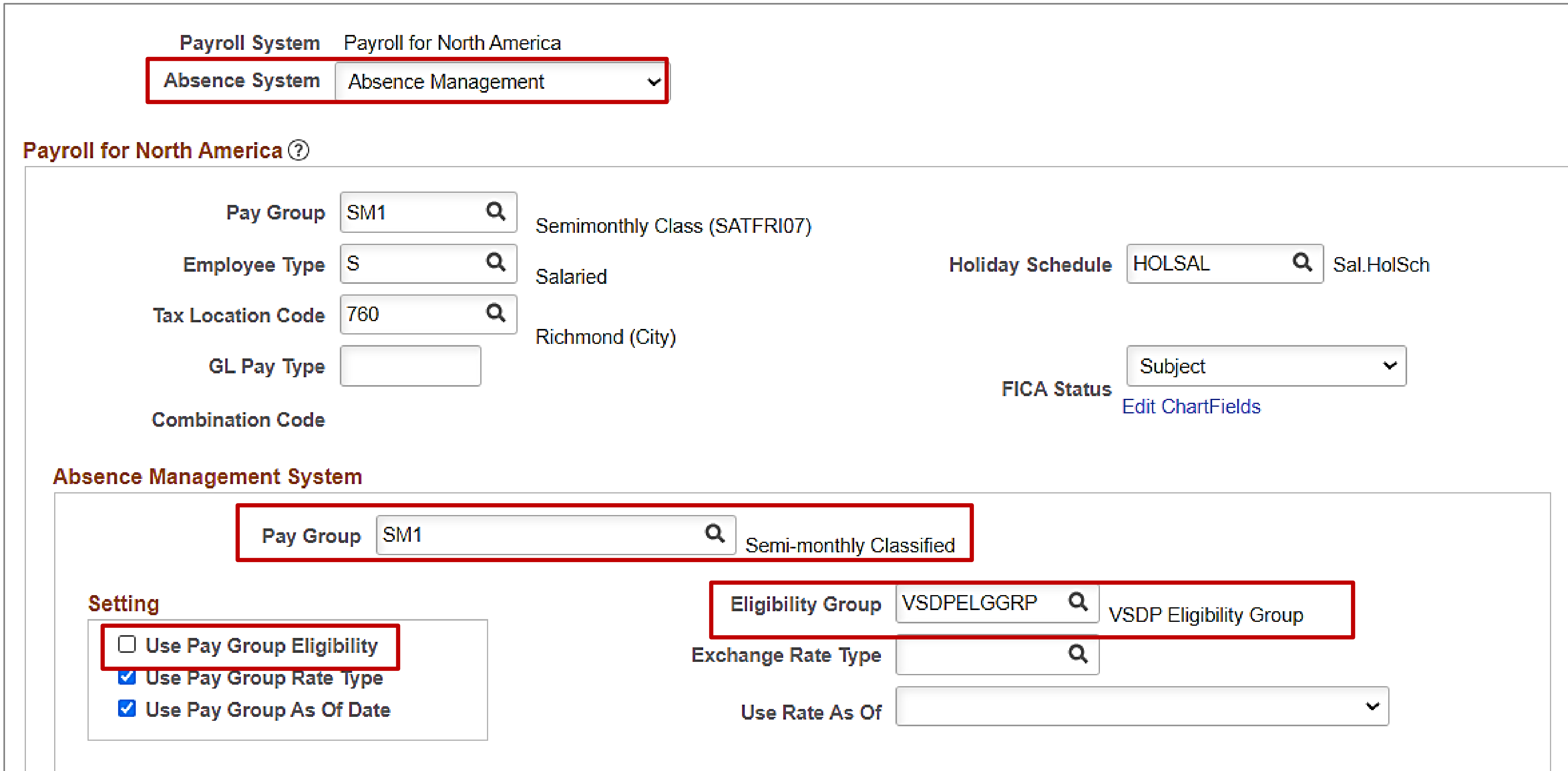
Payroll Information
Key fields in this section:

- **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)

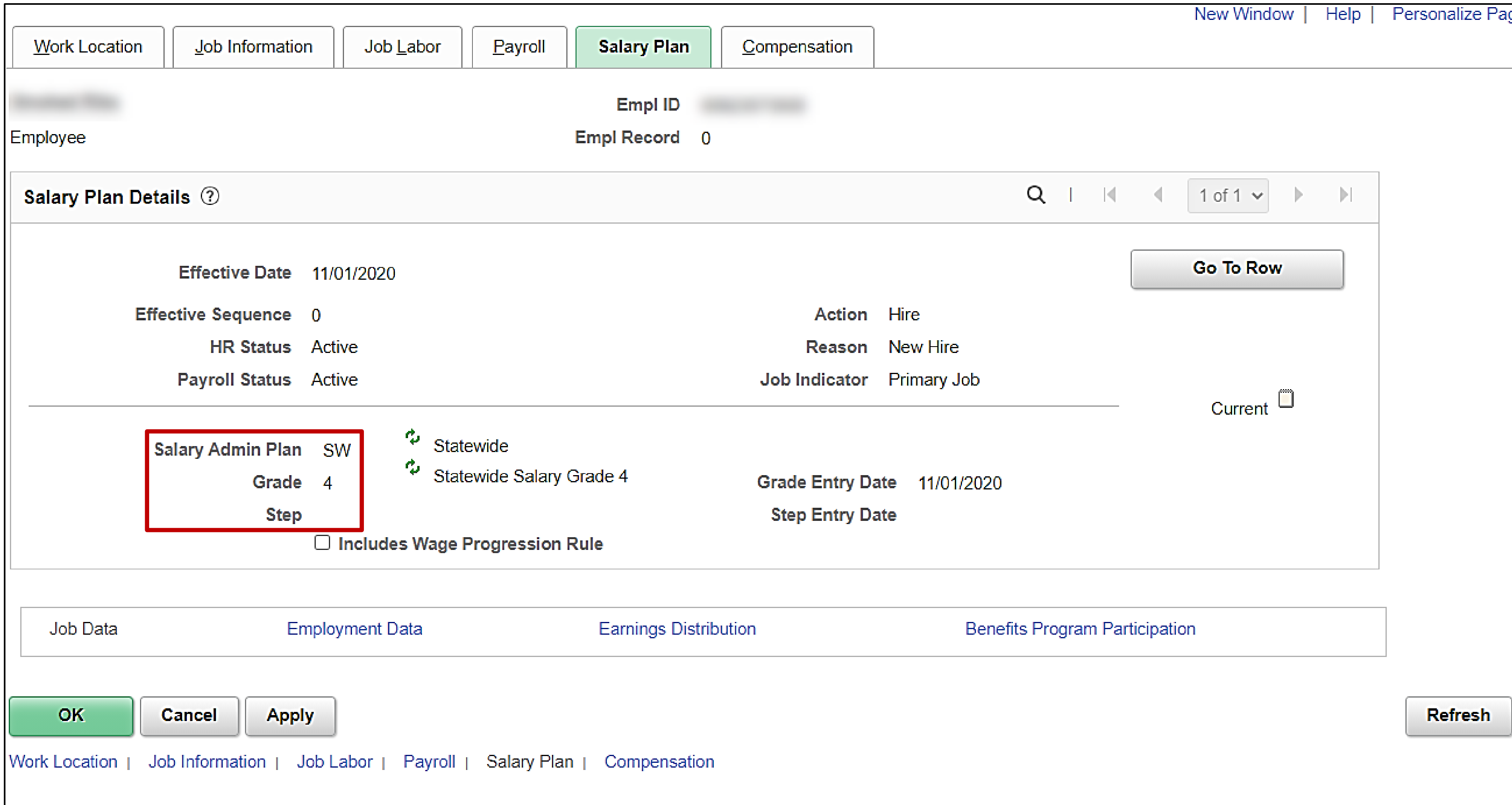
Job Data – Payroll Absence Management System



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

[redacted]
Employee

Empl ID [redacted]
Empl Record 0

Salary Plan Details

1 of 1

Go To Row

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

Current

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

Includes Wage Progression Rule

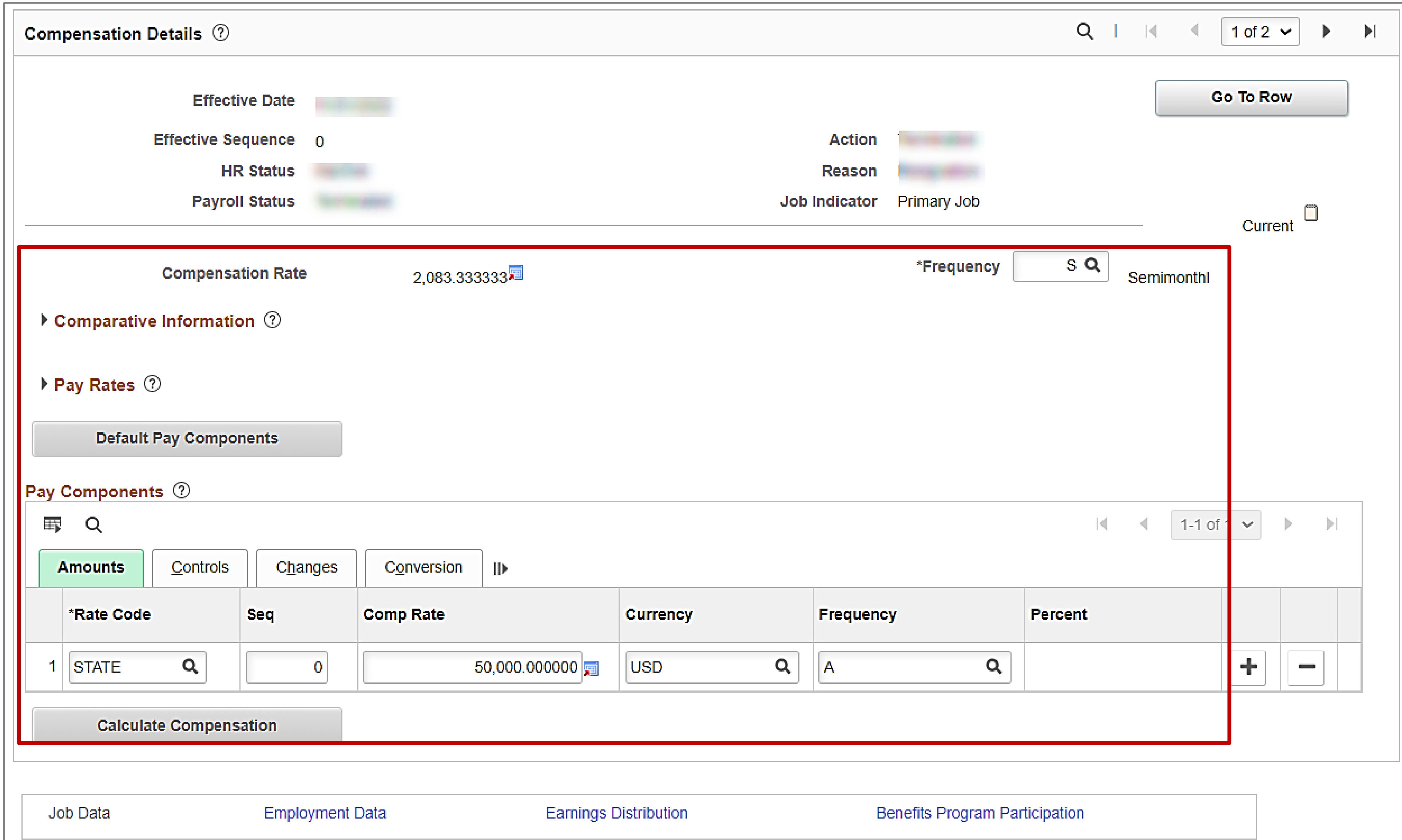
Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

OK | Cancel | Apply | Refresh

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

Hiring an Employee - Compensation Tab

Job Data – Compensation Details

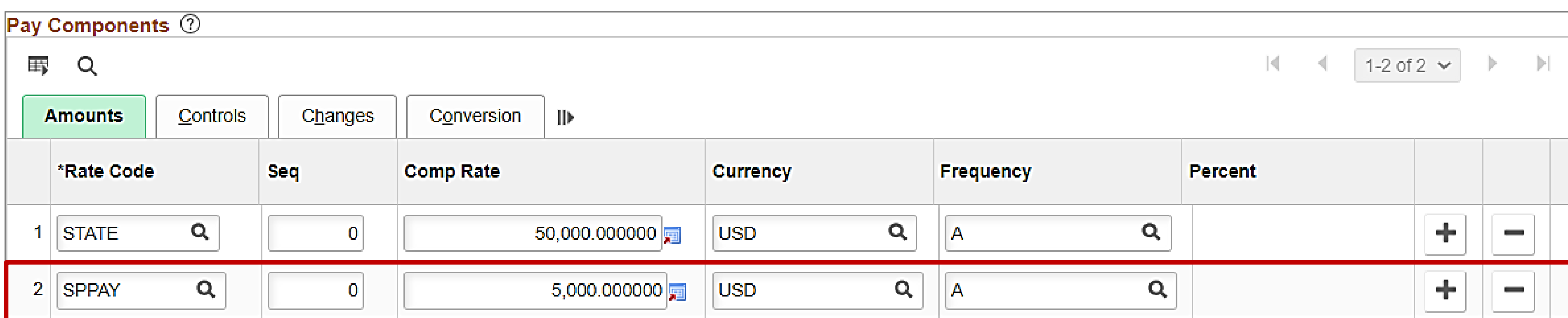


Hiring an Employee – Compensation Tab (continued)

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.

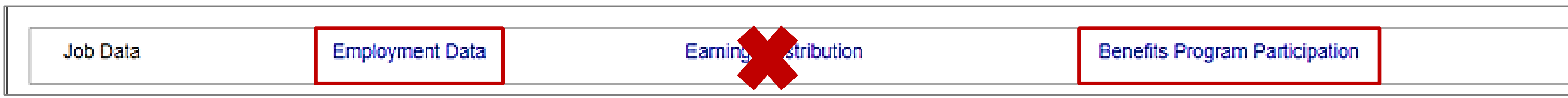


Job Data Links

Job Data Links at the Bottom of the Page

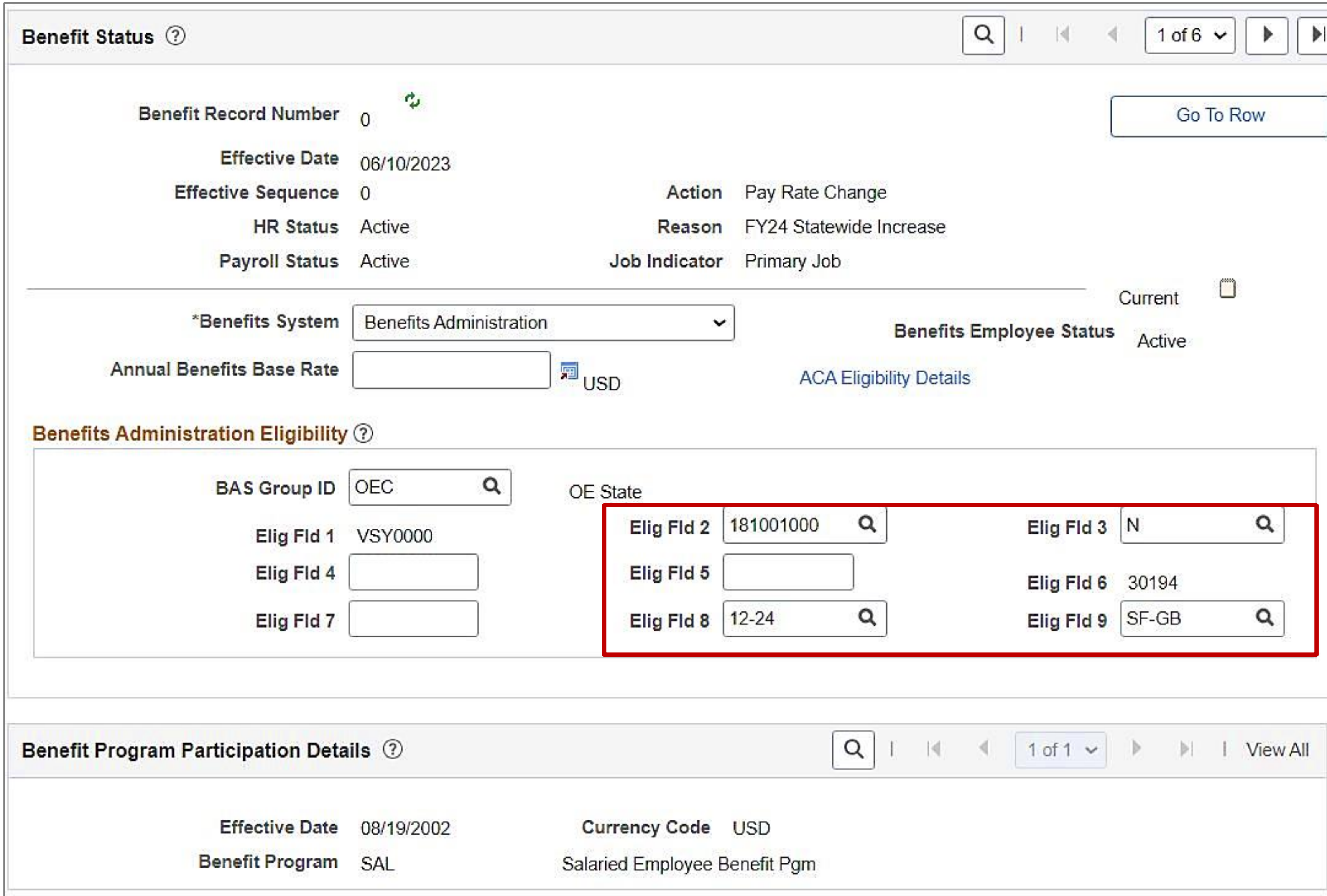
After completing the Job Data tabs, the **Employment Information** and **Benefits Program Participation** pages must be completed by accessing these links.

- Employment Data
- Earning Distribution (not used)
- Benefits Program Participation



Hiring an Employee – Benefits Program Participation

Benefit Status – Benefits Administration Eligibility



Hiring an Employee – Benefits Program Participation link

Benefit Status

Key fields in the Benefits Administration Eligibility section:

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

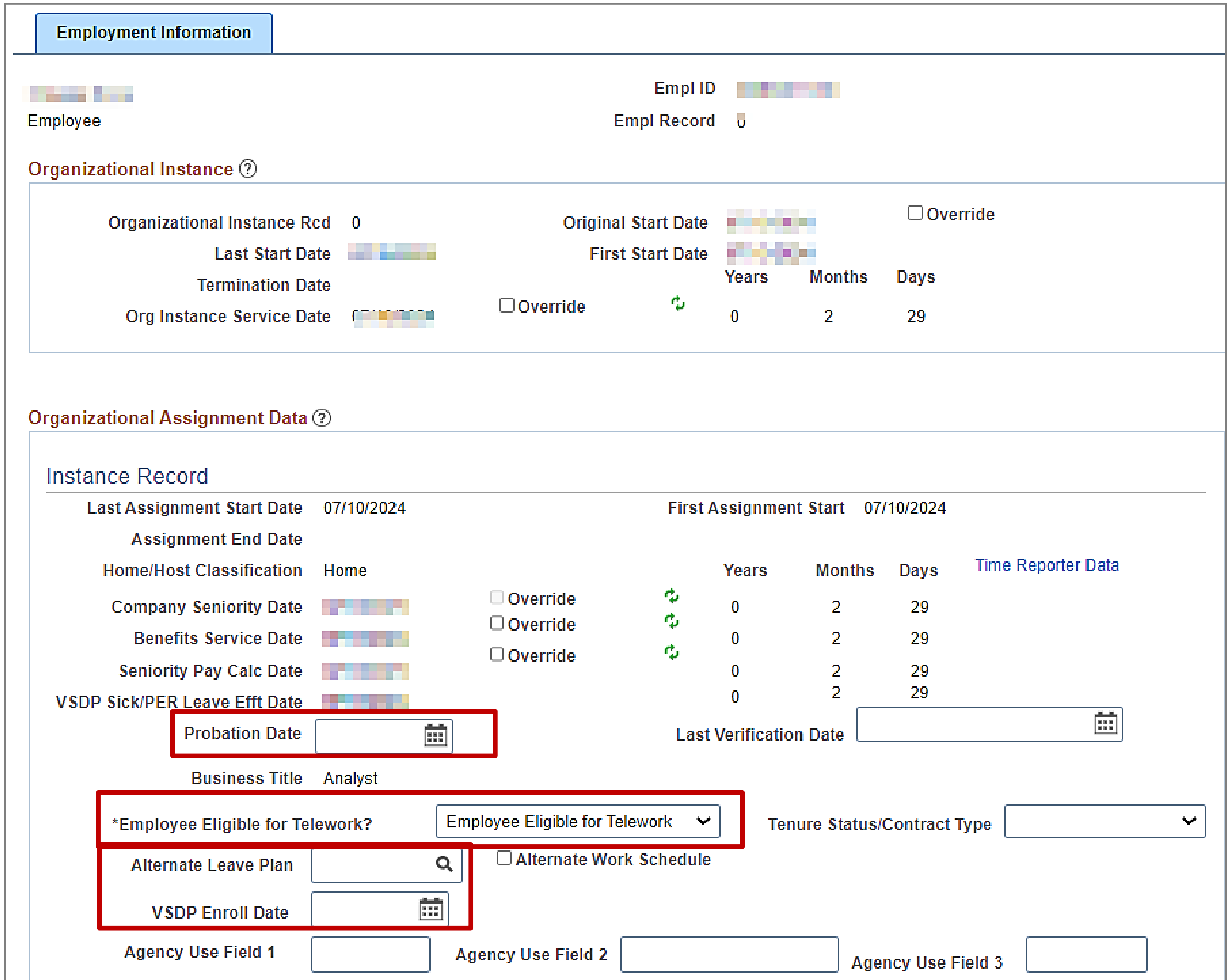
Note: Users will receive a warning message upon saving the hire if these fields are not completed.

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?



Hiring an Employee – Employee Information

Job Data – Employment Information

Key fields related to hiring an employee:

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

  Note: The employee's position must be Available for Telework in order for the Employee to be Eligible for telework. For more information regarding telework, see the job aid titled **HR351_Managing Employee Teleworker Data**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**

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

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

- **VSDP Enroll Date**: enter the date of hire as the date of enrollment into the Virginia Sickness and Disability Program.

Hiring an Employee – Telework Agreement

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

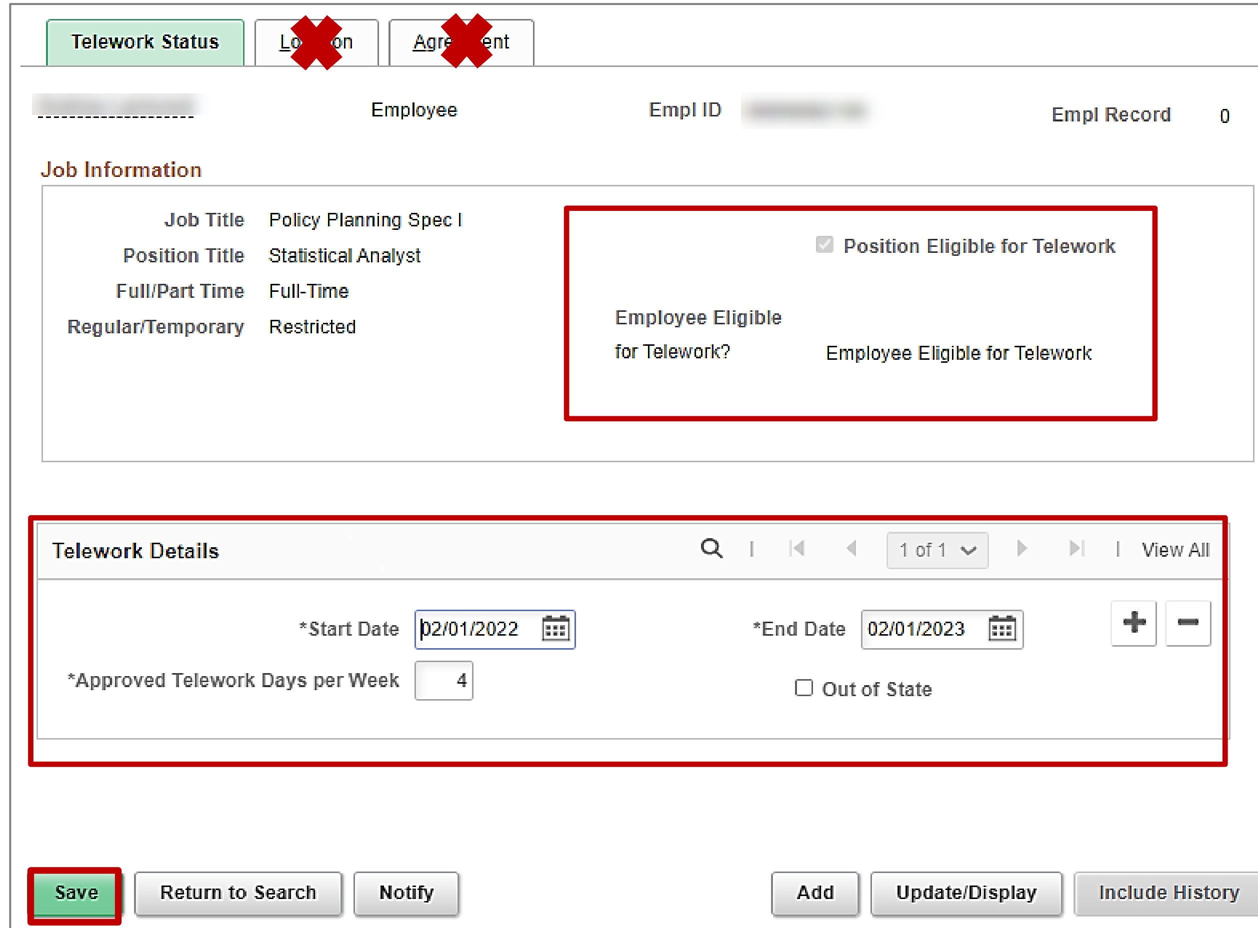
Review the **Job Information** section for **Position** and **Employee Eligibility for Telework**.

- 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

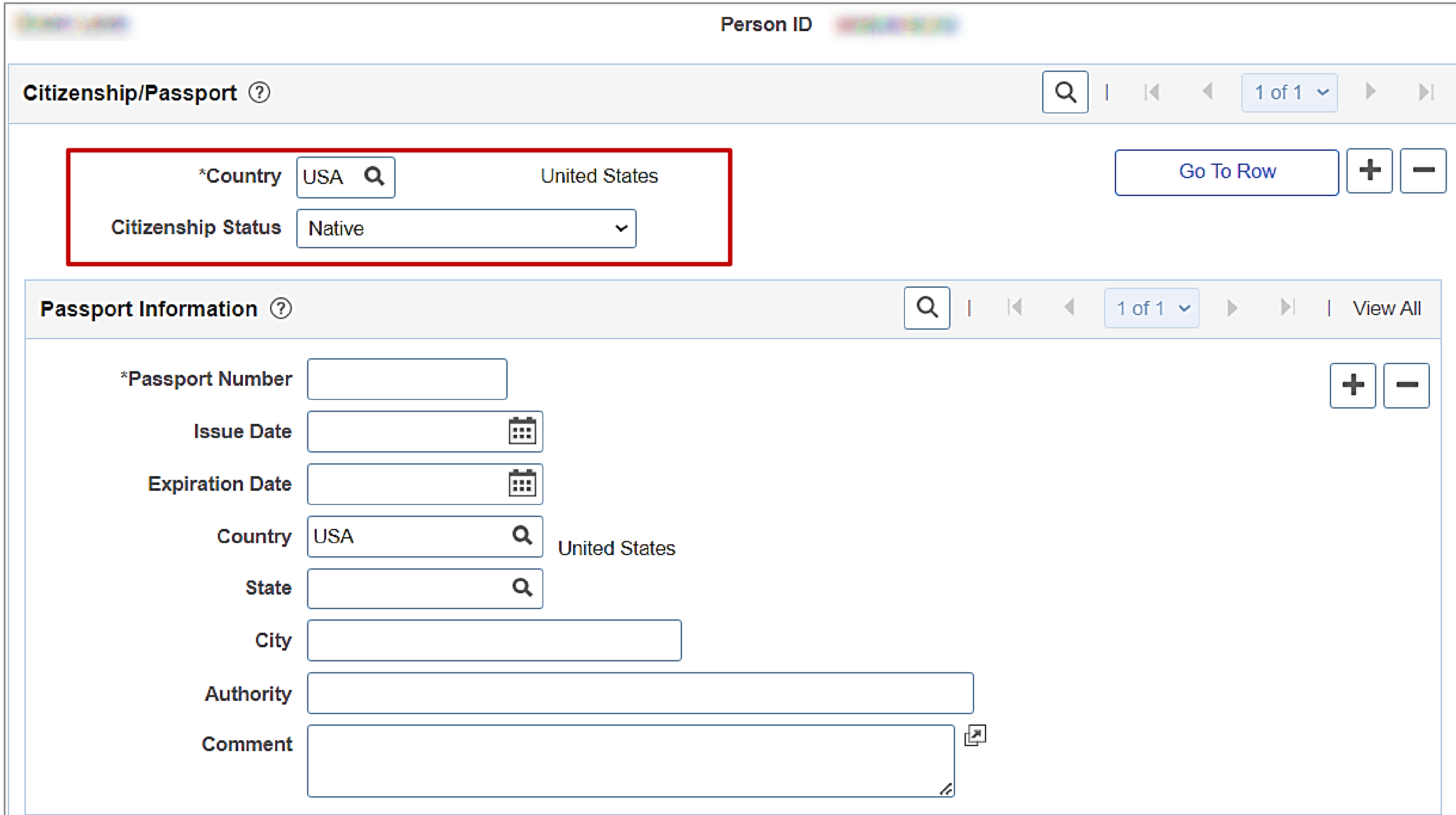
Telework agreements are typically entered for one year at a time.



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



For further information on entering an employee's citizenship information, see the job aid titled **HR351_Viewing and Modifying Personal Data.** This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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.

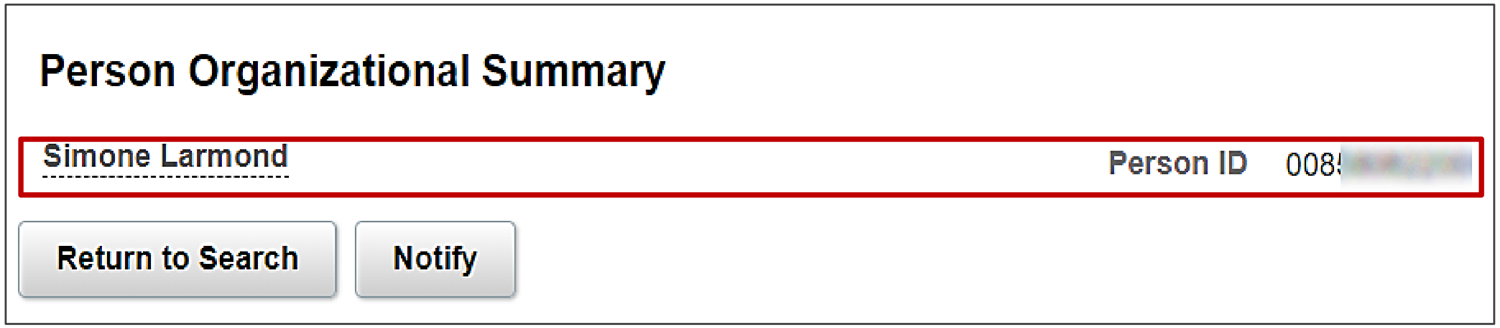
1. Which statements are true for the **Effective Date** on the Work Location tab? (Select all that apply)
   a) It represents the hire date of the employee
   b) It must the same date or later than personal data effective date
   c) It must always be the same effective date as personal data

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

Staged employee



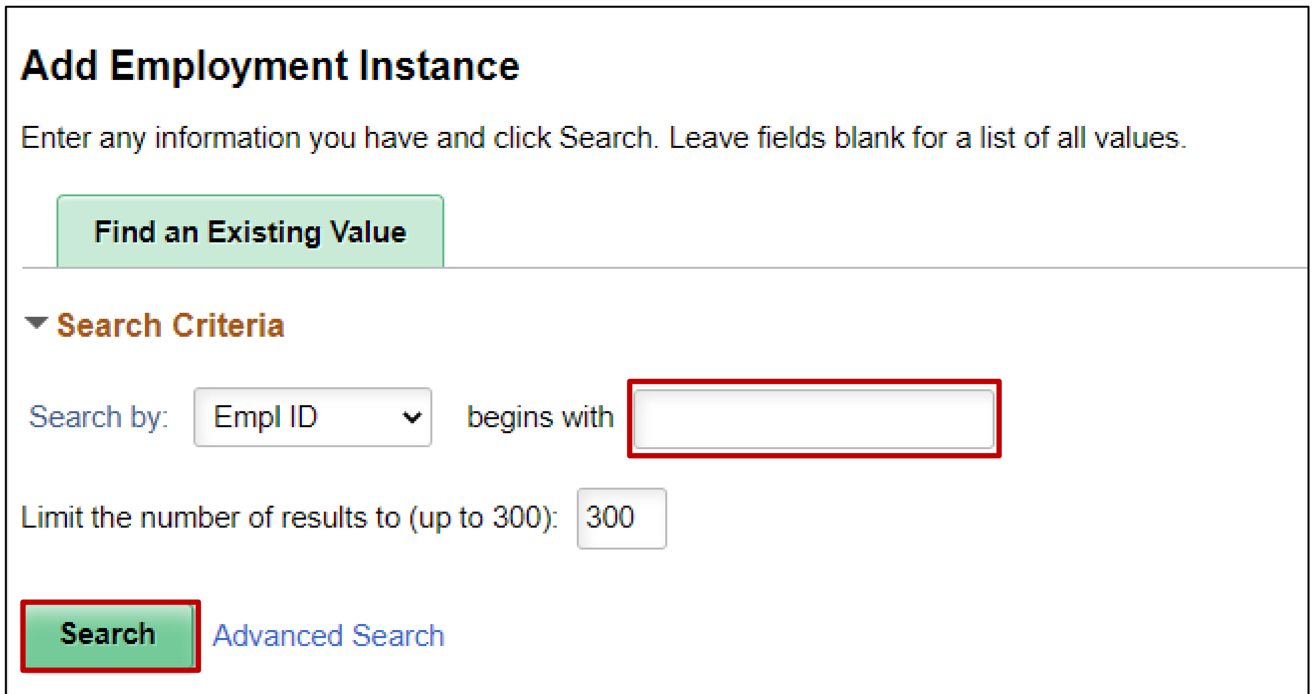
New Hire Scenario	Rehire Scenario
Only personal data was entered into Cardinal to obtain the employee ID.	Only personal data was converted into Cardinal because they were terminated prior to 2021.

Note: The **New Employment Instance** menu 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:

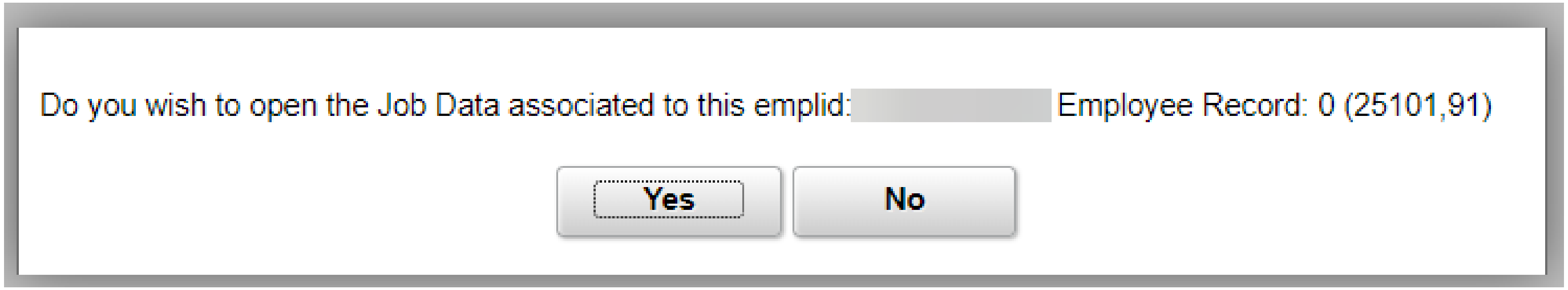
Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance



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

Adding New Employment Instance Question

The following message displays.



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)

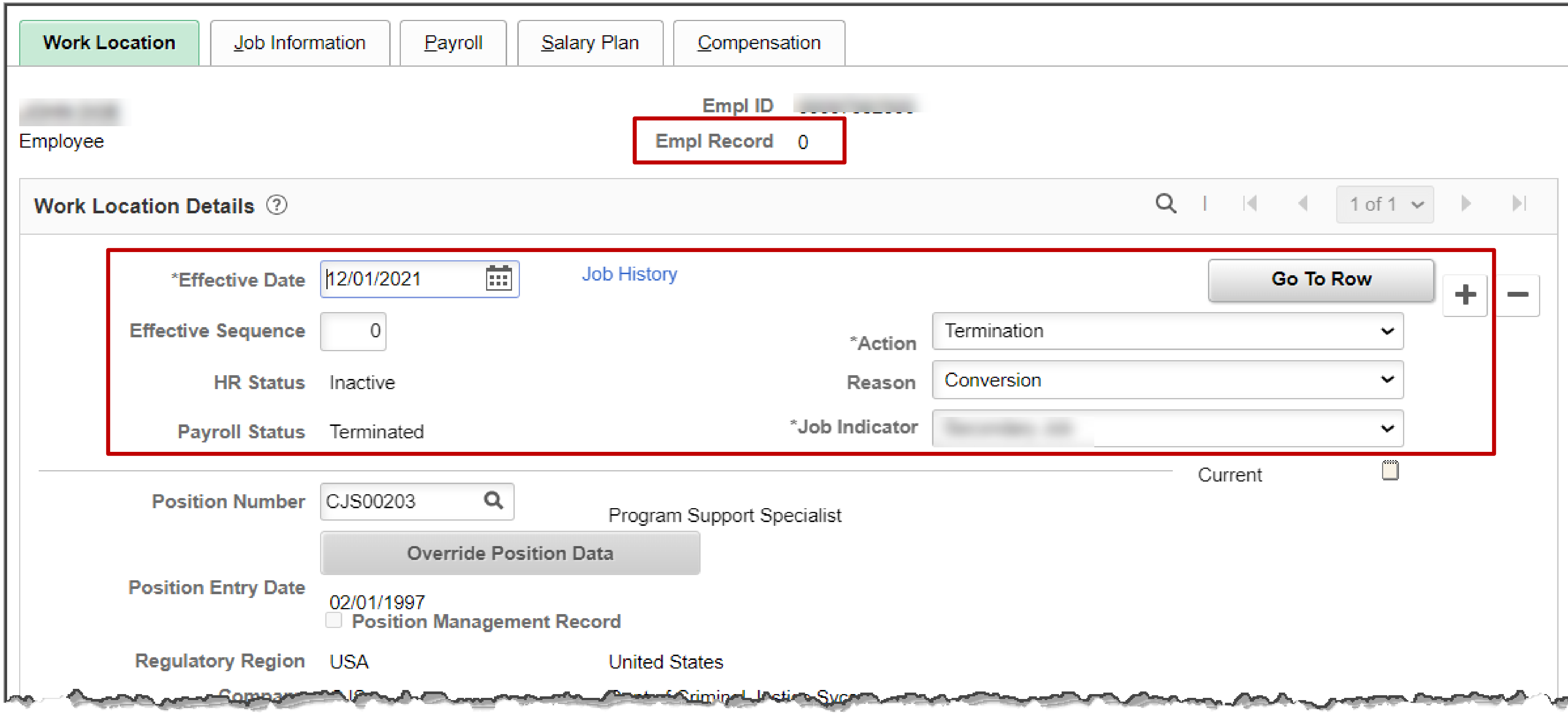
Select **No** when
- Rehiring but to a different agency
- Rehiring for different type (i.e., Wage to Salary, Salary to Wage)

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

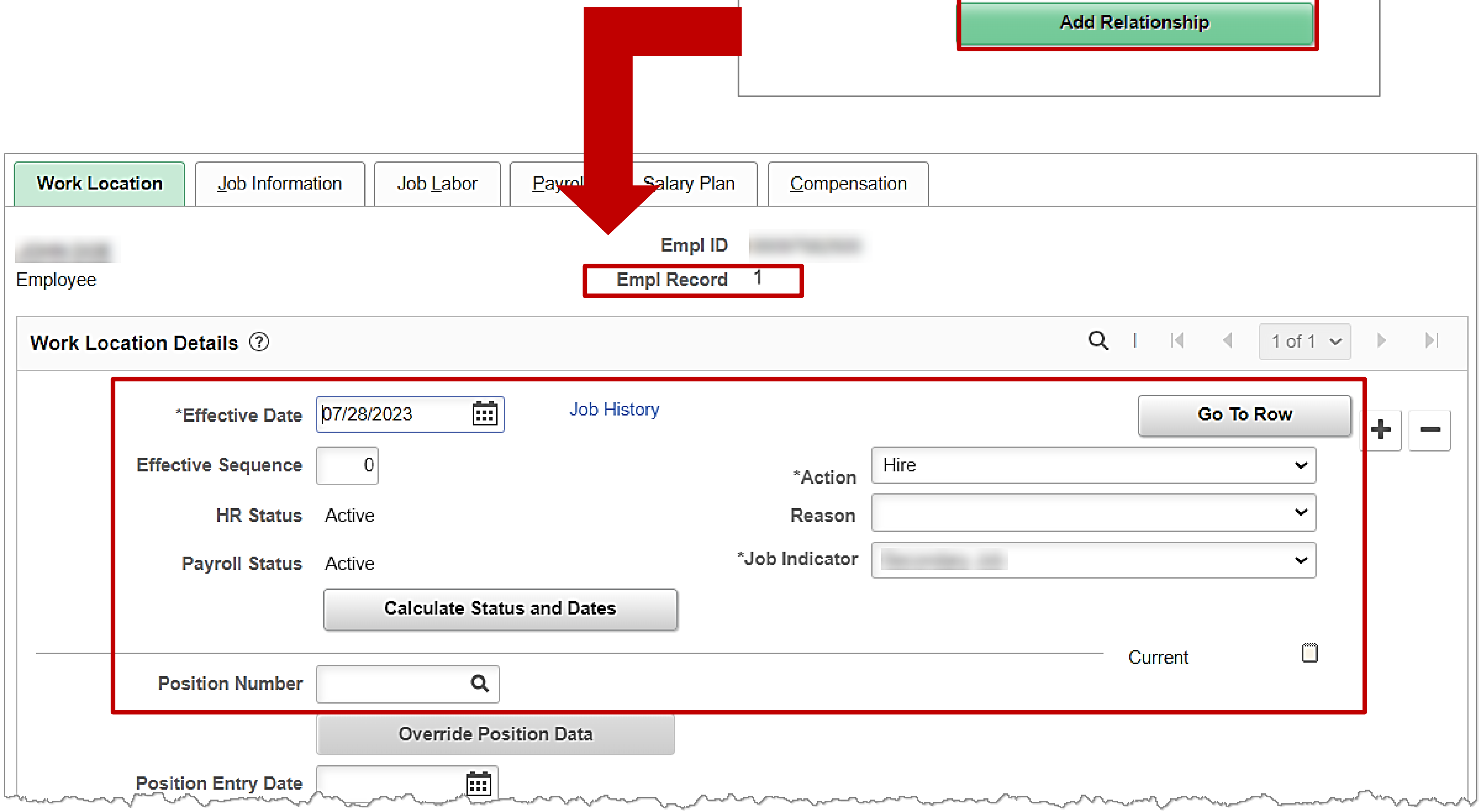
Rehire: Opens job data for Employee Record 0; click the **Add a Row icon (+)** to add rehire transaction to top of existing record



Answer No: New Employee Record is Created

Rehire: Employee Record is incremented by 1 digit

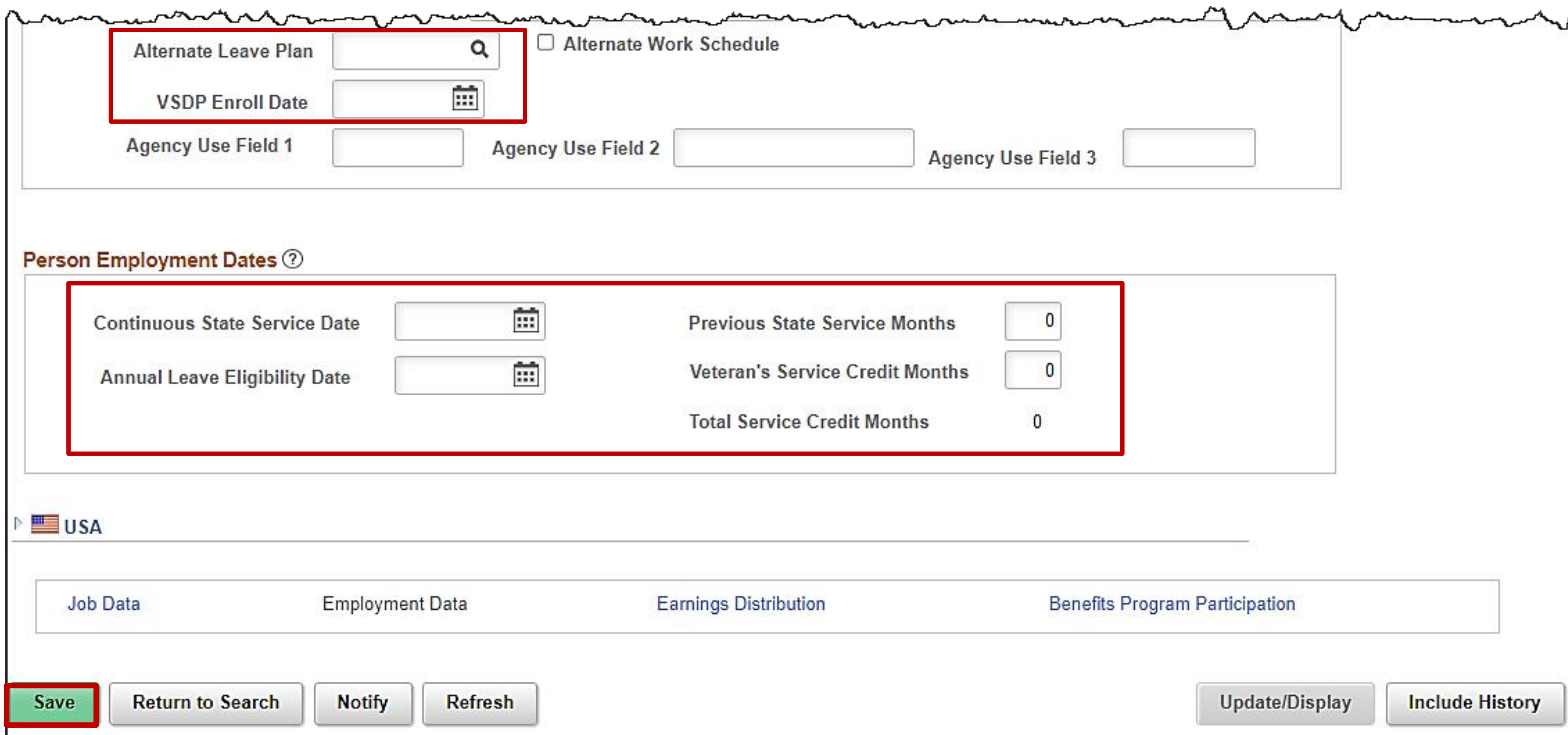
- Employee rehired to same agency as a different type (i.e., wage to salary)
- Employee rehired to a different agency



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



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
- **Alternate Leave Plan:** select the leave eligibility plan for the employee (i.e., VSDP)
- **VSDP Enroll Date**: this is entered as the first date of hire
- **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 Summary

5 Managing Employee Job Data

In this lesson, you learned:

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

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

Intra-Agency Transfer is the movement of an 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

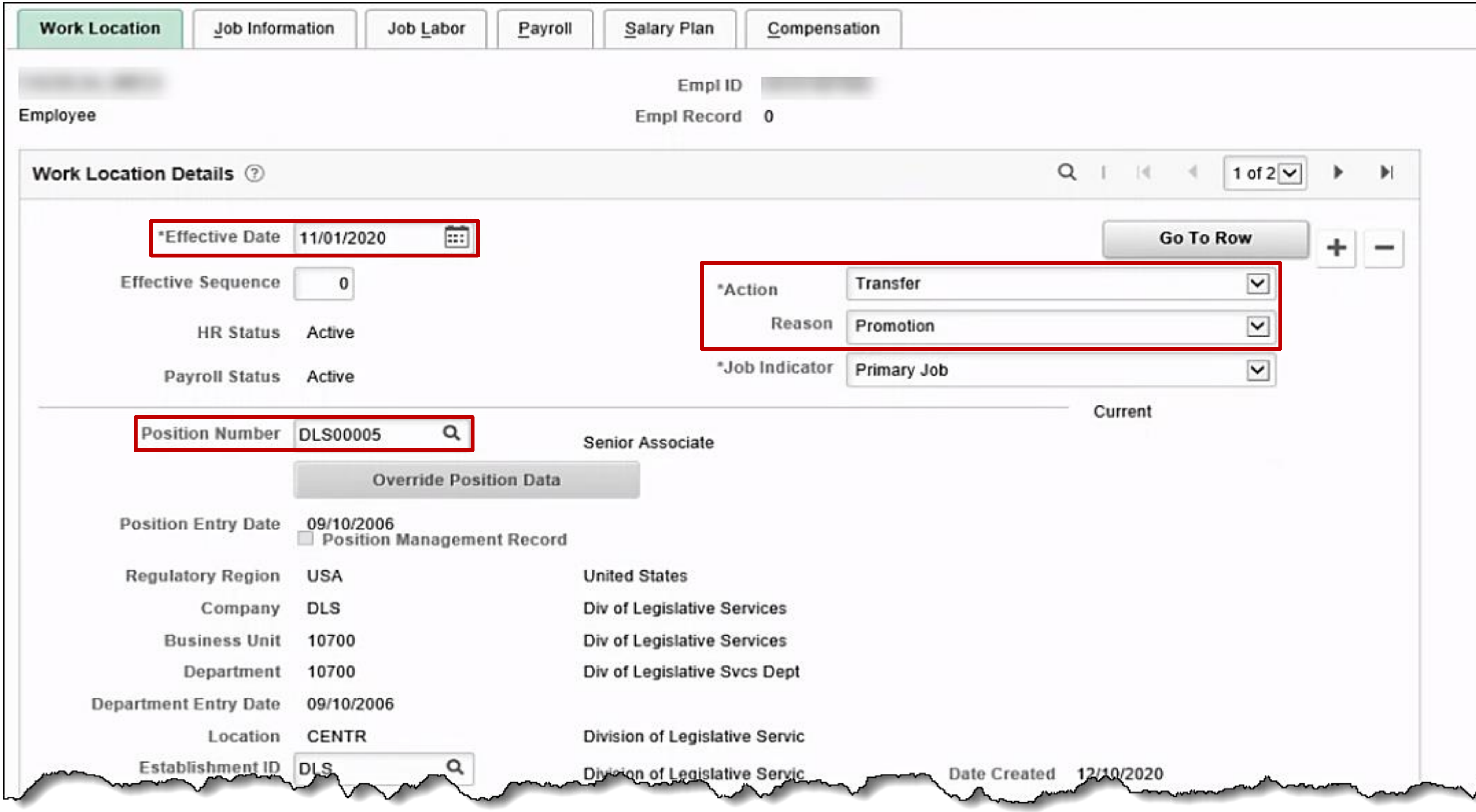
When completing a change from a wage position to another wage position it is no longer necessary to terminate the wage/hourly employee and rehire them into a new wage/hourly position. To complete this type of transaction HR Admin will simply insert a row and select Action of **Transfer** and the applicable Reason.

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**.

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



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)

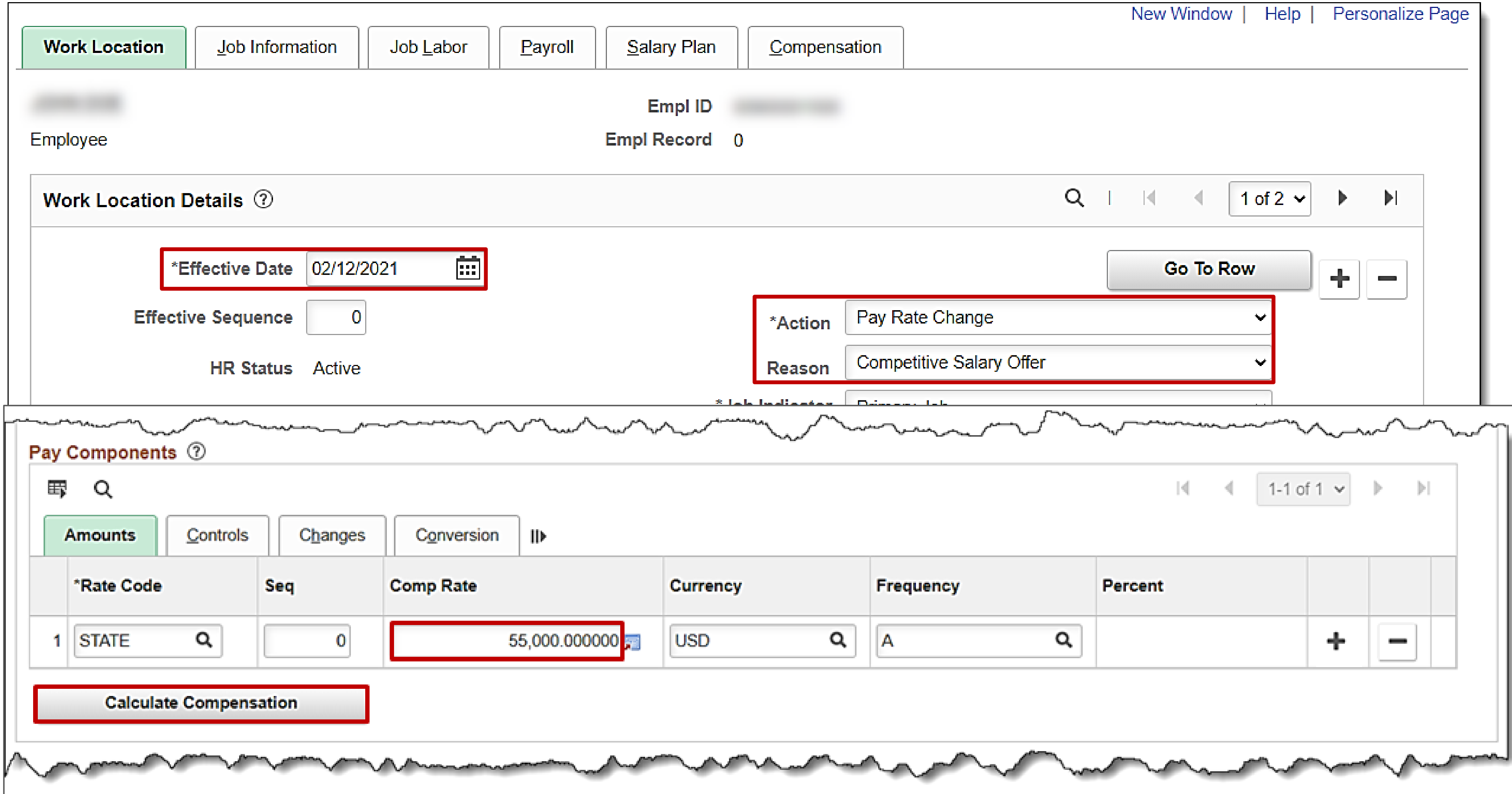
Payroll Administrator runs reports and queries for the reconciliation process

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)



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.

Sending Agency

- Verify that all necessary information is obtained prior to key the transfer action.
- Confirm the **Effective Date** of the transfer with the receiving agency to ensure no break in service i.e., consider using LNP
- Provide the employee's leave balances (if applicable) in case a balance adjustment is needed
- Enter the **Termination / Transfer Out** transaction

Receiving Agency

- Verify that all necessary data is in hand
- 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 (same effective date as the transfer out)
- 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
- 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 (after waiting 24 hours) using the **New Employment Instance** option to create a new employee record* and using the Action / Reason of **Hire / Transfer In**
- **Note:** If the employee is returning to the receiving agency, it may be possible to use their existing employee record.

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.

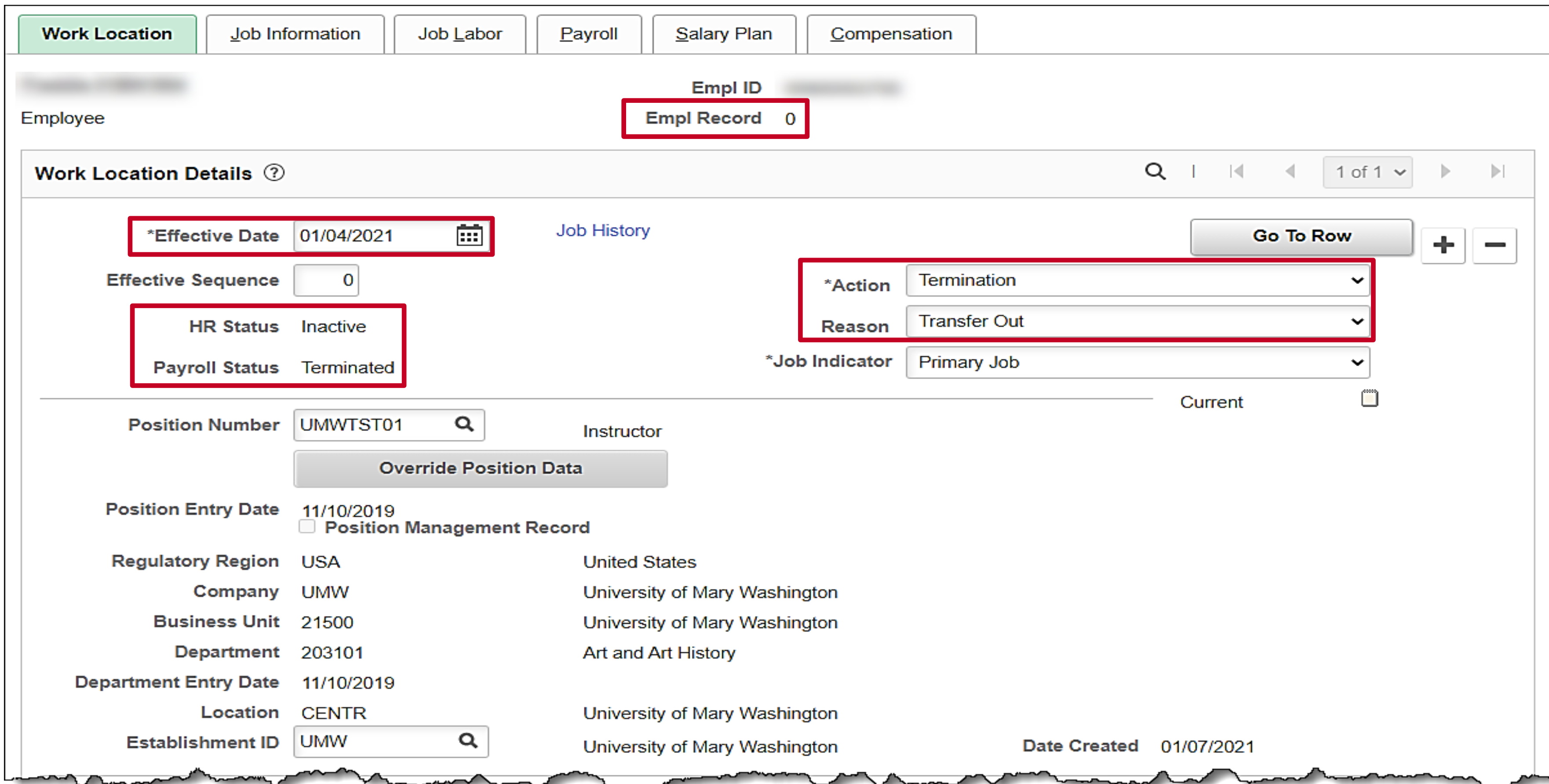
The Receiving Agency's Benefits Administrator will need to review the transferred employee's information to ensure the transfer is done correctly and with as little disruption to the employee as possible. See job aid titled **BN361_Managing Terminations and Transfers** for more details. This job aid 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

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

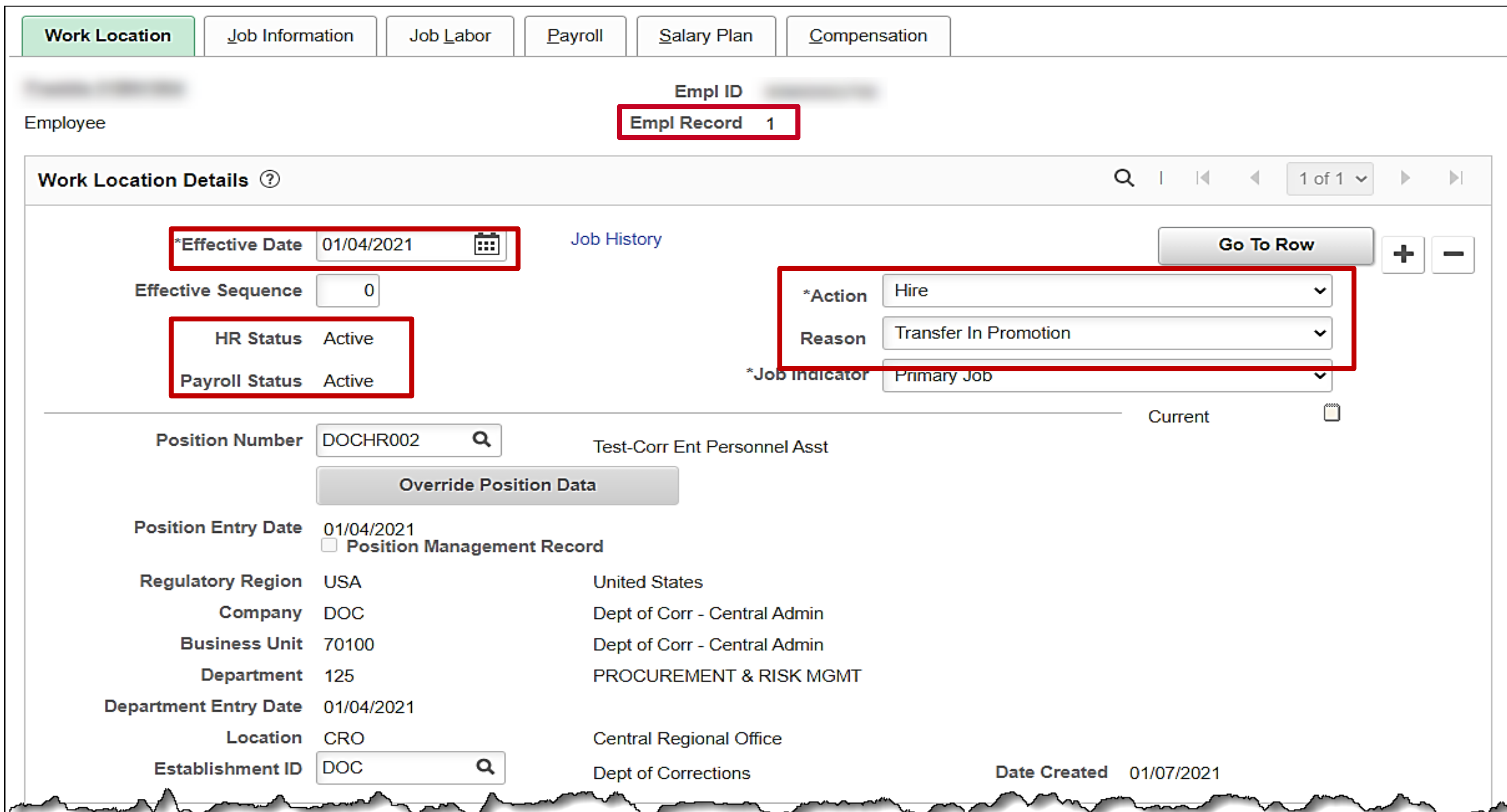
- **Action** - **Termination**
- **Reason** - **Transfer Out**



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



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 after 1pm on the day of 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 2024									
Pay period End **SM1** **SM1MMDDYY**	**Pay period End** **SM2** **SM2MMDDYY**	***Create Paysheets*** ***3:00 - 5:00 PM***	***Data Freeze*** ***10:00 - 10:45 AM***	***Confirm Pay*** ***1:00 - 3:00 PM***	**Interfacing Agencies Timesheet Deadline** ***10:00 PM***	**Payday**	**Off Cycle**	**Off Cycle Confirm** **1:00 - 3:00 PM**	**Off Cycle Pay Date**
1/9/2024	1/15/2024	*12/29/2023*	*1/5/2024*	*1/9/2024*	*1/12/2024*	1/16/2024	OSM011624	1/16/2024	1/17/2024
01/24/2024	1/31/2024	*1/16/2024*	*1/24/2024*	*1/26/2024*	*1/31/2024*	2/1/2024	OSM020124	1/31/2024	2/2/2024
02/09/2024	2/15/2024	*1/31/2024*	*2/8/2024*	*2/12/2024*	*2/15/2024*	2/16/2024	OSM021624	2/15/2024	2/20/2024
02/24/2024	2/29/2024	*2/15/2024*	*2/22/2024*	*2/26/2024*	*2/29/2024*	3/1/2024	OSM030124	2/29/2024	3/4/2024
3/9/2024	3/15/2024	*2/29/2024*	*3/7/2024*	*3/11/2024*	*3/14/2024*	3/15/2024	OSM031524	3/14/2024	3/18/2024
3/24/2024	3/31/2024	*3/14/2024*	*3/21/2024*	*3/25/2024*	*3/28/2024*	3/29/2024	OSM032924	3/28/2024	4/1/2024
4/9/2024	4/15/2024	*3/28/2024*	*4/8/2024*	*4/10/2024*	*4/15/2024*	4/16/2024	OSM041624	4/15/2024	4/17/2024
4/24/2024	4/30/2024	*4/15/2024*	*4/23/2024*	*4/25/2024*	*4/30/2024*	5/1/2024	OSM050124	4/30/2024	5/2/2024
5/9/2024	5/15/2024	*4/30/2024*	*5/8/2024*	*5/10/2024*	*5/15/2024*	5/16/2024	OSM051624	5/15/2024	5/17/2024

Data Freeze: Limited HR pulled into paychecks

Sample Payroll Calendar

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): 10/22/2024

Pay Period End Date for Current Cycle	Data Freeze for Current Cycle	Confirm Pay for Current Cycle
10/24/2024	10/21/2024	10/26/2024

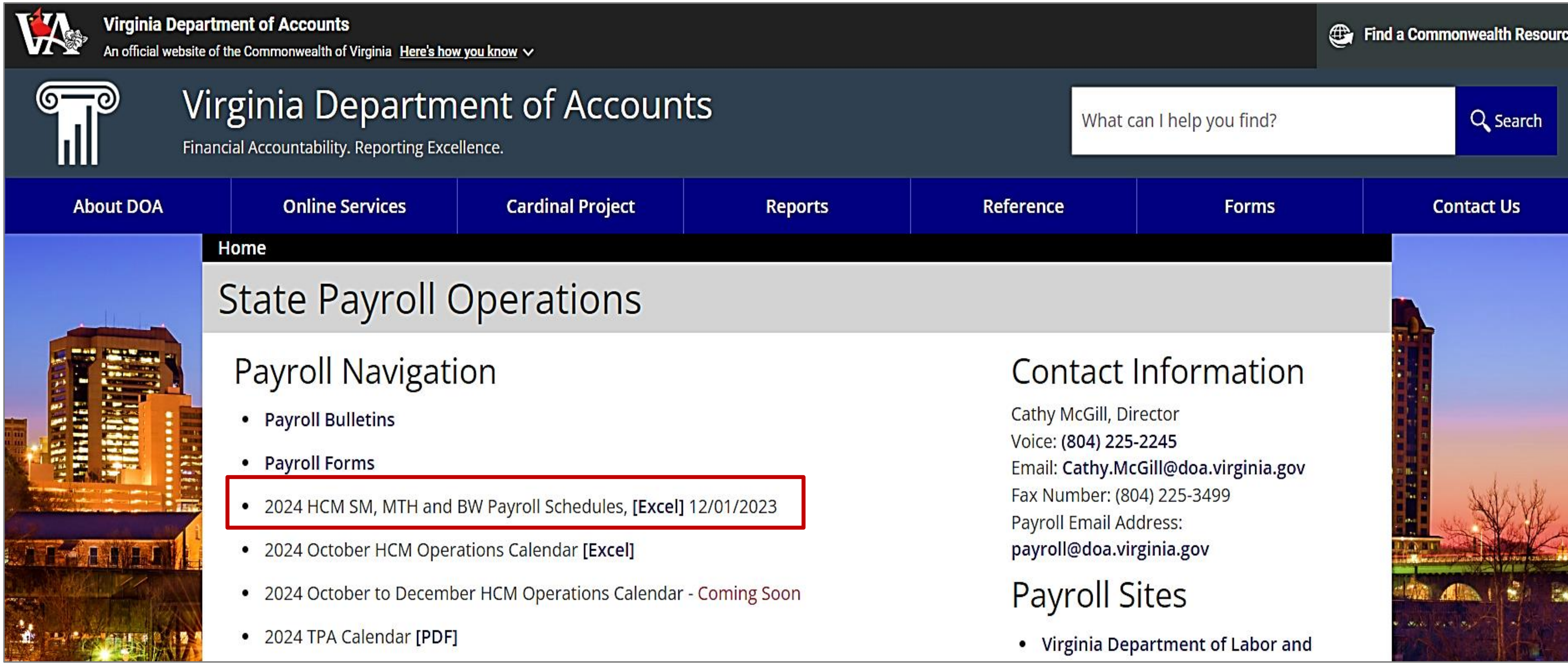
Scenario		
Scenario 1: Need to key a payrate change for an employee effective **10/25/2024**	✔	Transaction effective date in next pay period
Scenario 2: Need to key a promotion with a salary increase, effective **10/10/2024**	✘	Wait or follow up with Payroll Administrator
Scenario 3: Need to key a lateral transfer due to disciplinary reasons with a salary decrease, effective **10/1/2024**	✘	Wait or follow up with Payroll Administrator

When is the first available date to key the transactions in scenario 2 & 3? **10/26/2024 after 1pm**

After 1pm Confirm Pay Date

Location of Payroll Processing Calendars

- https://doa.virginia.gov/reference/payroll/https://doa.virginia.gov/reference/payroll/
  - 2024 HCM SM, MTH and BW Payroll Schedules, (Excel) 12/01/2023



Leave of Absence Overview

There are two categories of Leave of Absences in Cardinal: Paid and Unpaid.

Paid Leave – For paid leave of absences for Short Term Disability (STD), Long Term Disability (LTD) or Worker's Compensation Leave there are additional processing steps. These leave types require manual processing of payments by the Payroll Administrator. The HR Administrator must: (agencies serviced by PSB do not do these steps)

- Turn off the automatic semi-monthly payments generated by the SM1 or SM2 pay groups
  - This stops the automatic processing of the employee's salary and any additional pay in progress.
  - The Payroll Administrator manually calculates the employee's pay based on the percentages allowed by the STD plan and pay this amount via the SPOT (Single Use Payroll Online Tool)
  - Also, if the employee has leave that they would like to use to supplement the disability payment, the Payroll Administrator and TA Administrator can determine how much leave is required to do so.
- On the Payroll tab, the HR Administrator must change the Holiday Schedule from HOLSAL to HOLSTD
  - This affects the holidays the employee is paid for while on this type of leave.

Unpaid Leave – This type of leave is simpler to enter because the employee is not getting paid.

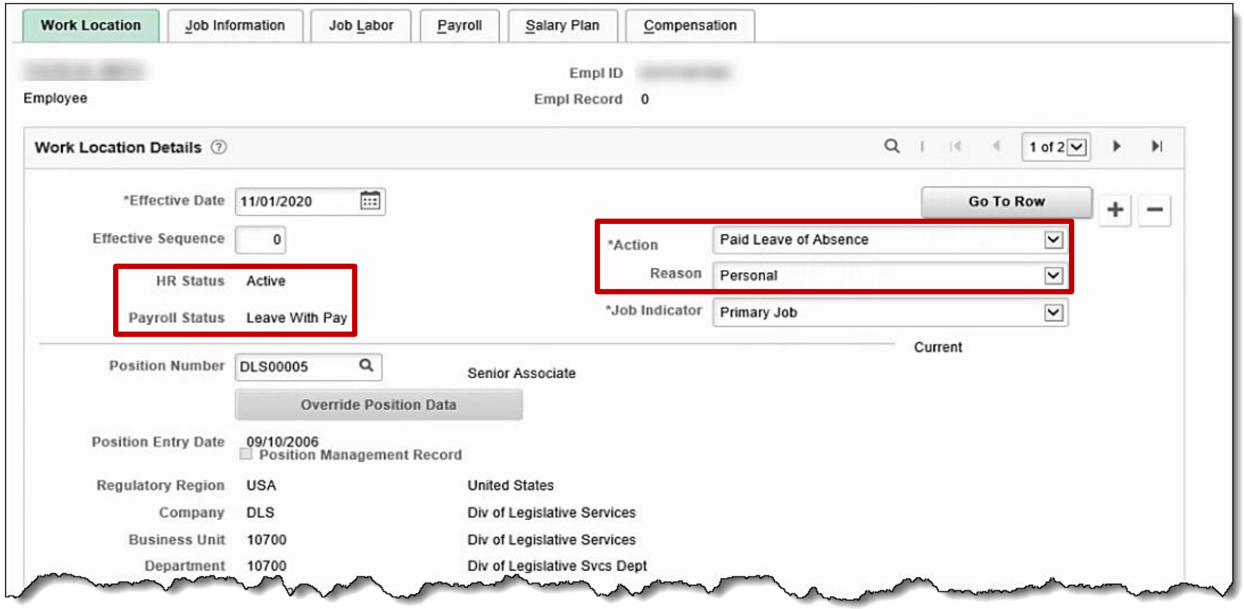
- Selecting the Action of Unpaid Leave stops the employee's pay from processing.

Return from Leave – When the employee physically returns from leave is when this entry is made in Cardinal.

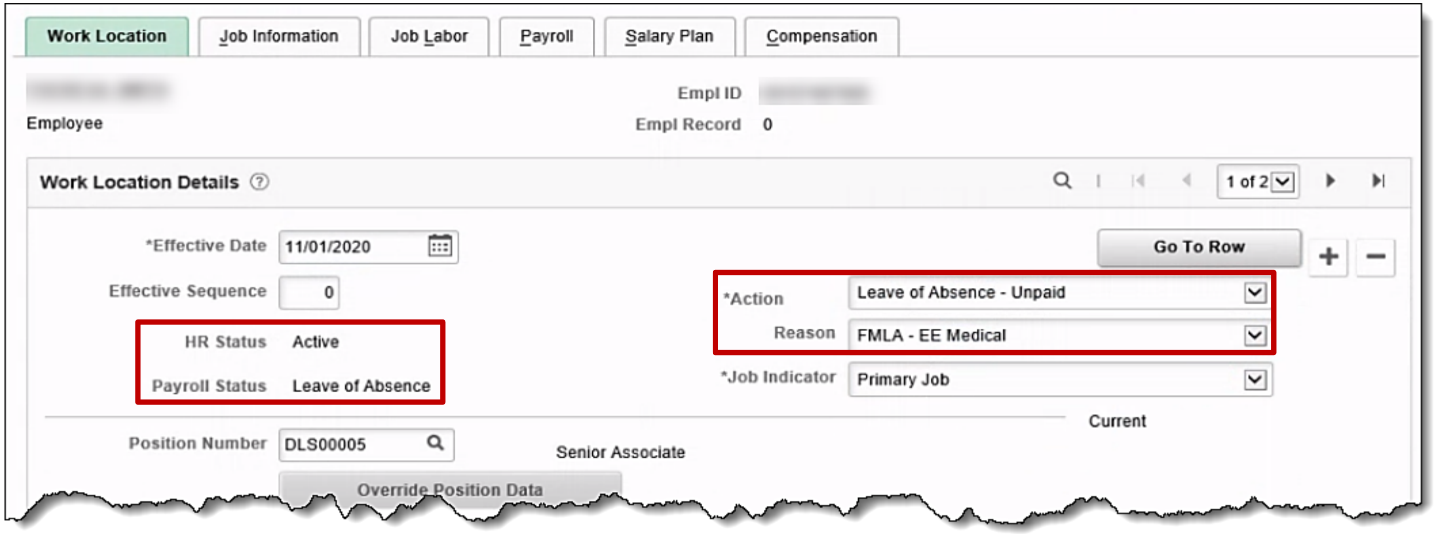
HR and Payroll Status for Leaves of Absence

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

Leave of Absence (Paid)



Leave of Absence (Unpaid)

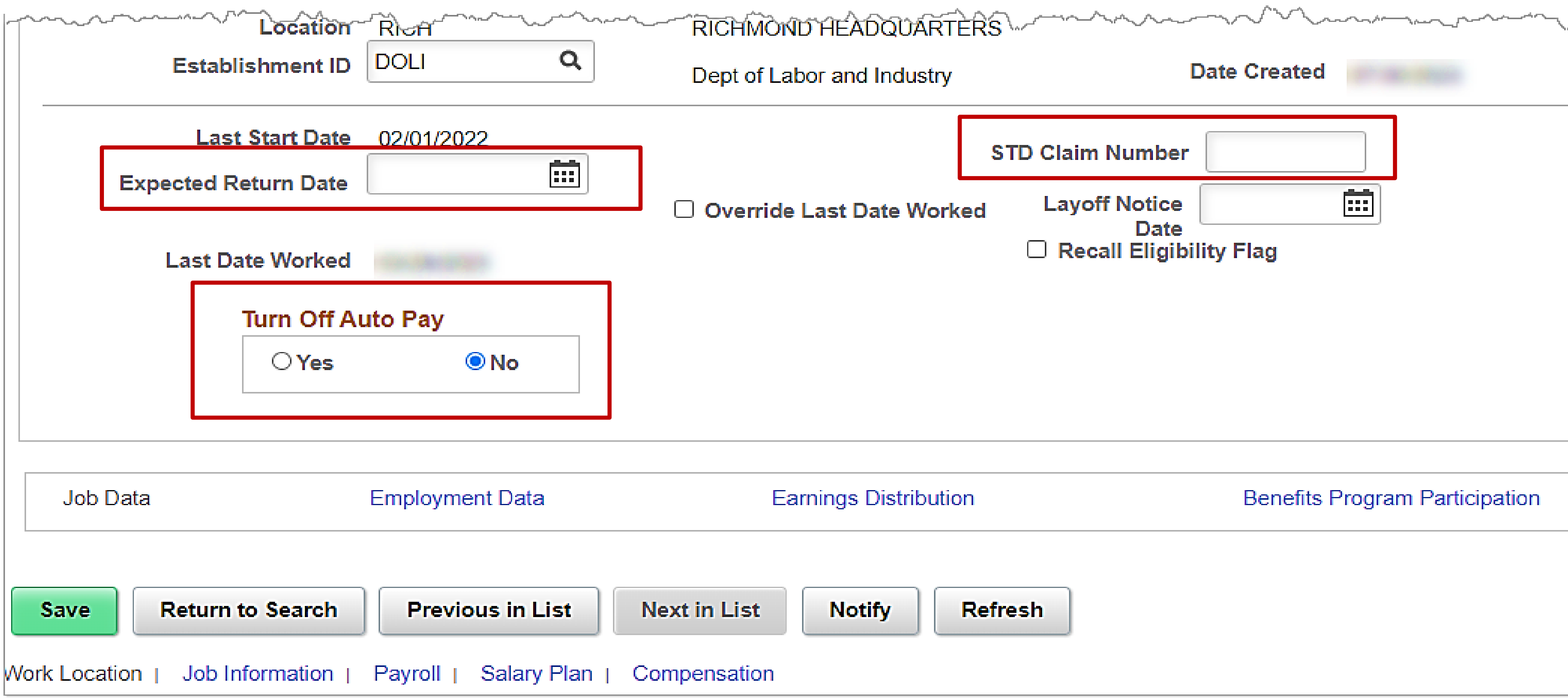


Additional Leave Related Fields

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

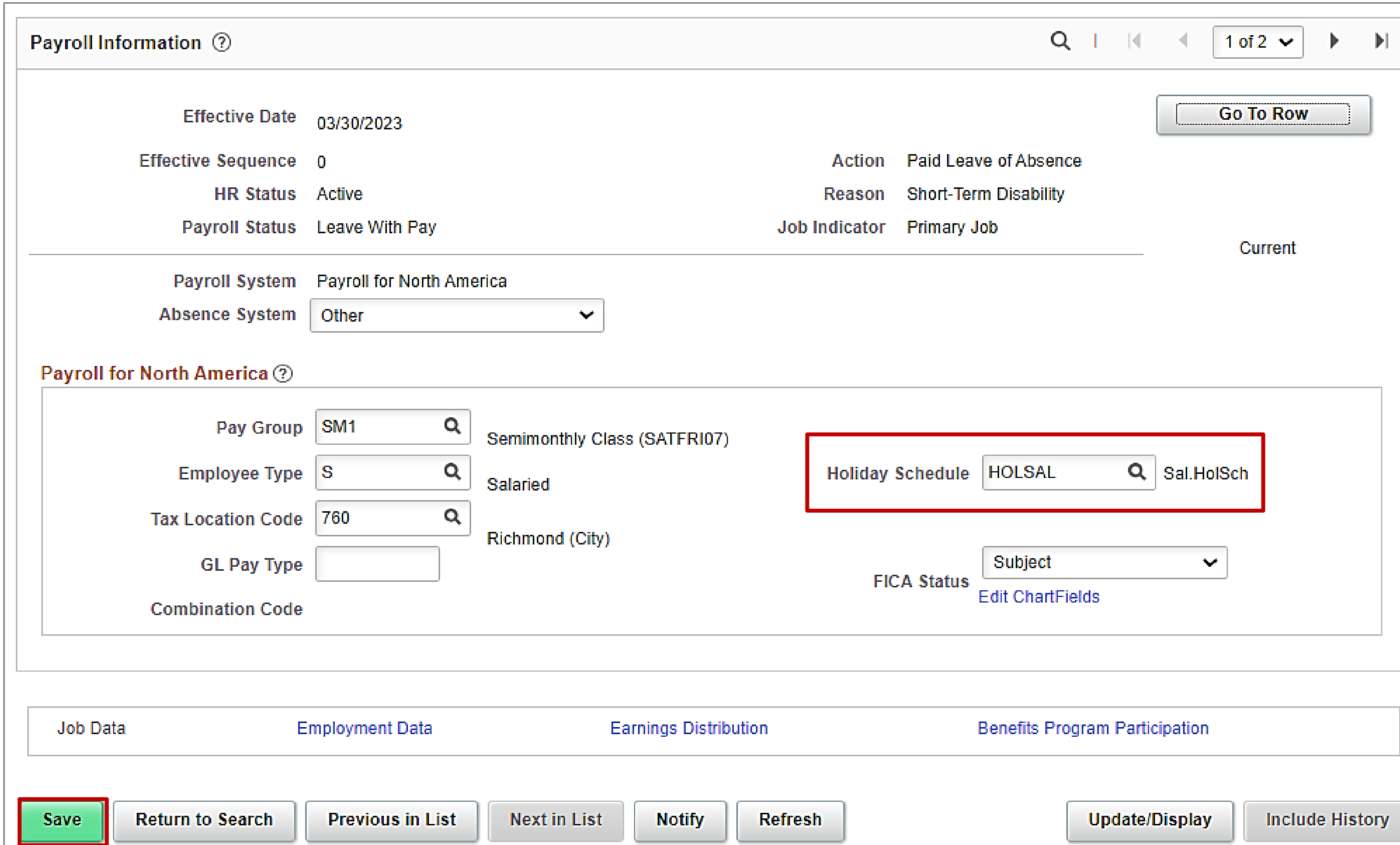
STD Claim Number – claim number obtained from paperwork; can be entered after entering the leave transaction

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



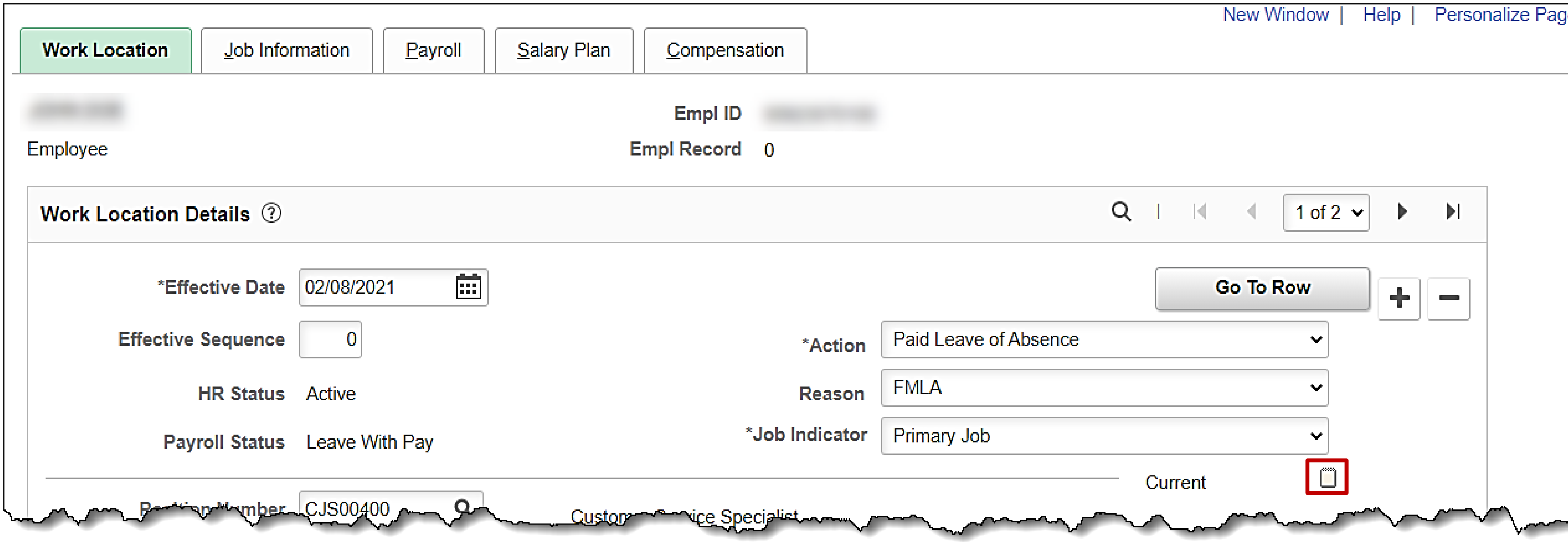
Payroll tab - Holiday Schedule

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



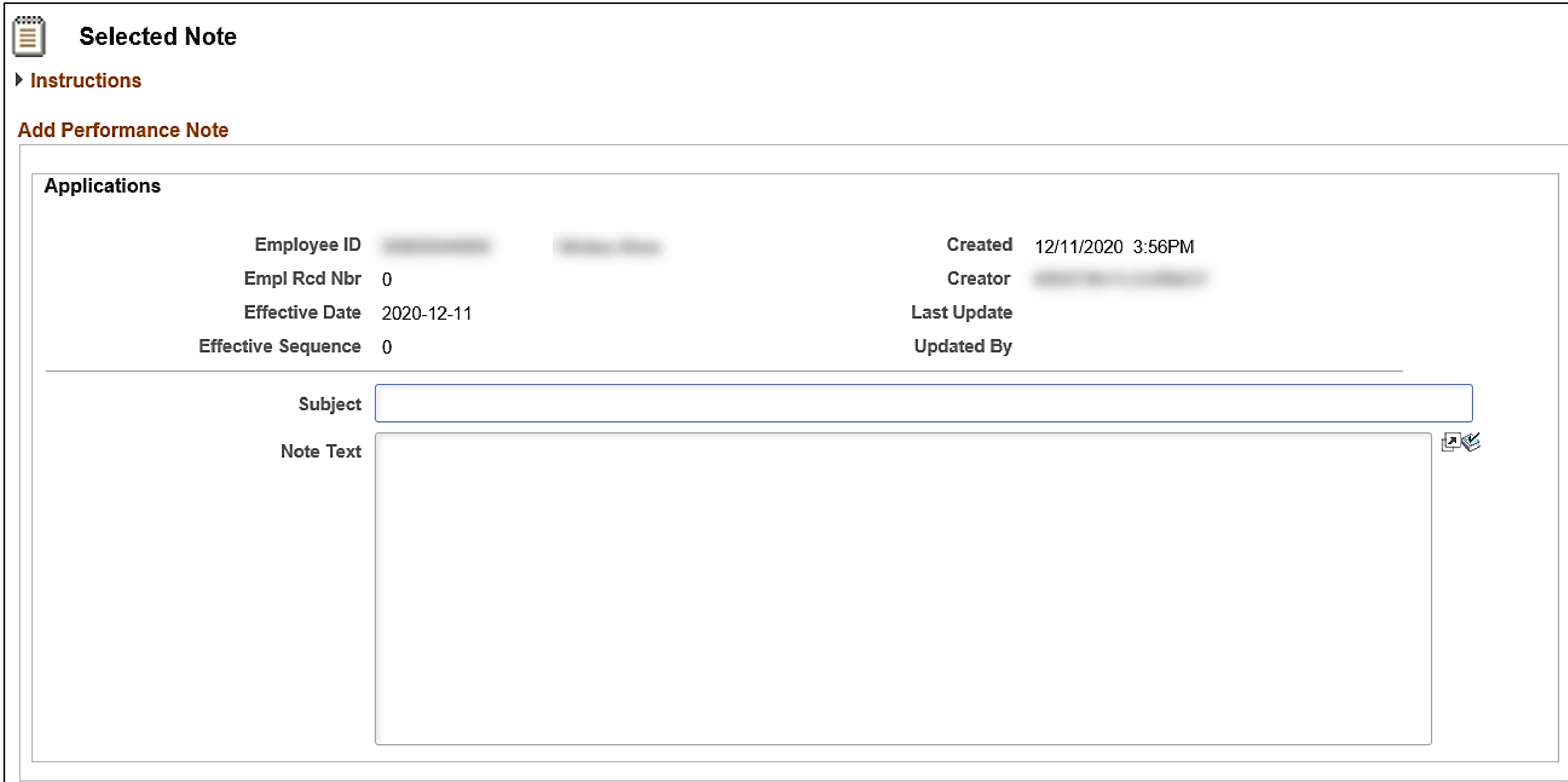
Notepad for Comments

Notepad - Used to capture key notes about updates made to job data. This feature is especially helpful when using the **Action/Reason** is **Data Change/Data Change**.



Non-Confidential Notes and Comments

Notepad functionality



Selected Note

Instructions

Add Performance Note

Applications

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

Subject

Note Text

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

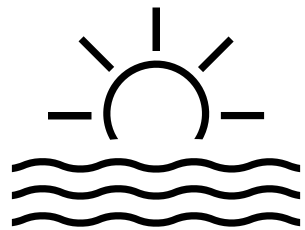
Types of **Separations/Terminations** covered in this section of the course:

Involuntary

- Layoff
- Standards of Conduct
- Unsatisfactory Performance during Probationary Period
- 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



Separations Overview

There are two Action / Reason combinations related to an employee's death:

- One is Termination/Death
- 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

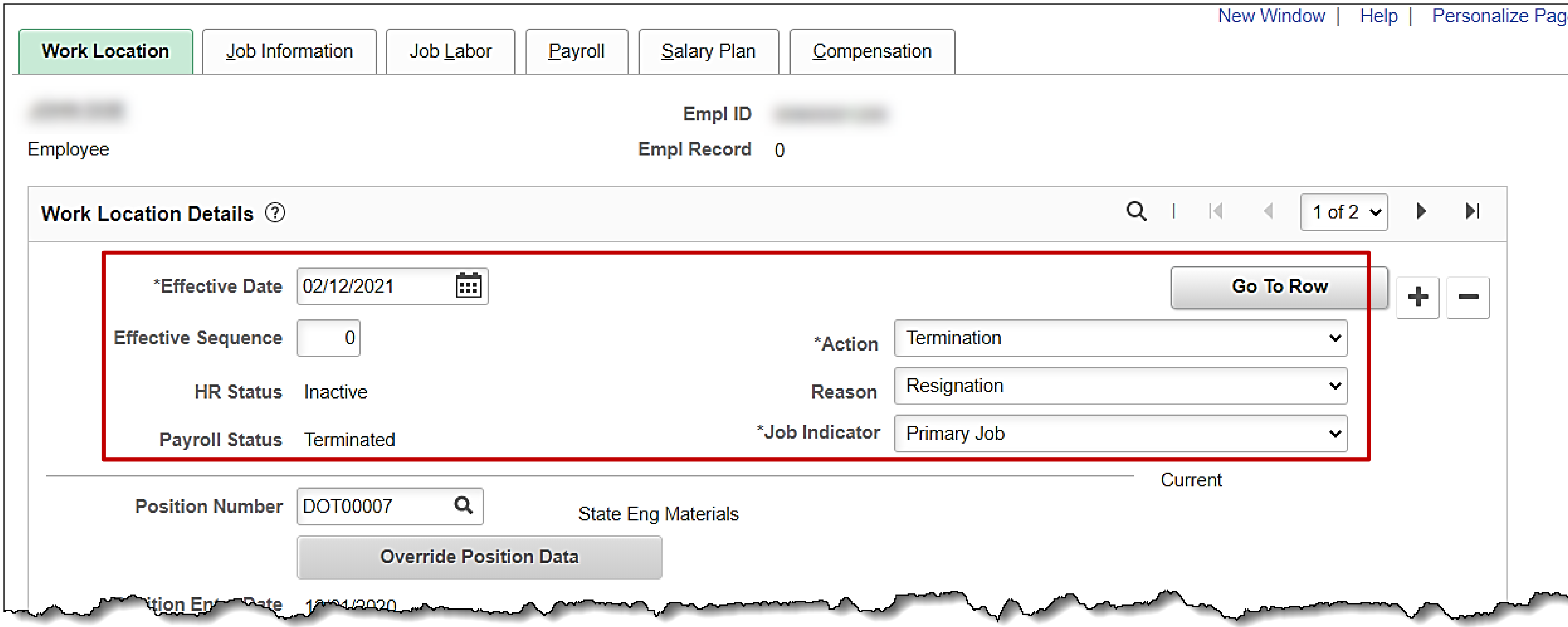
- The employee’s email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s.
  - The HR Administrator obtains the personal email address and updates the email address in Cardinal from Agency 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



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- 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

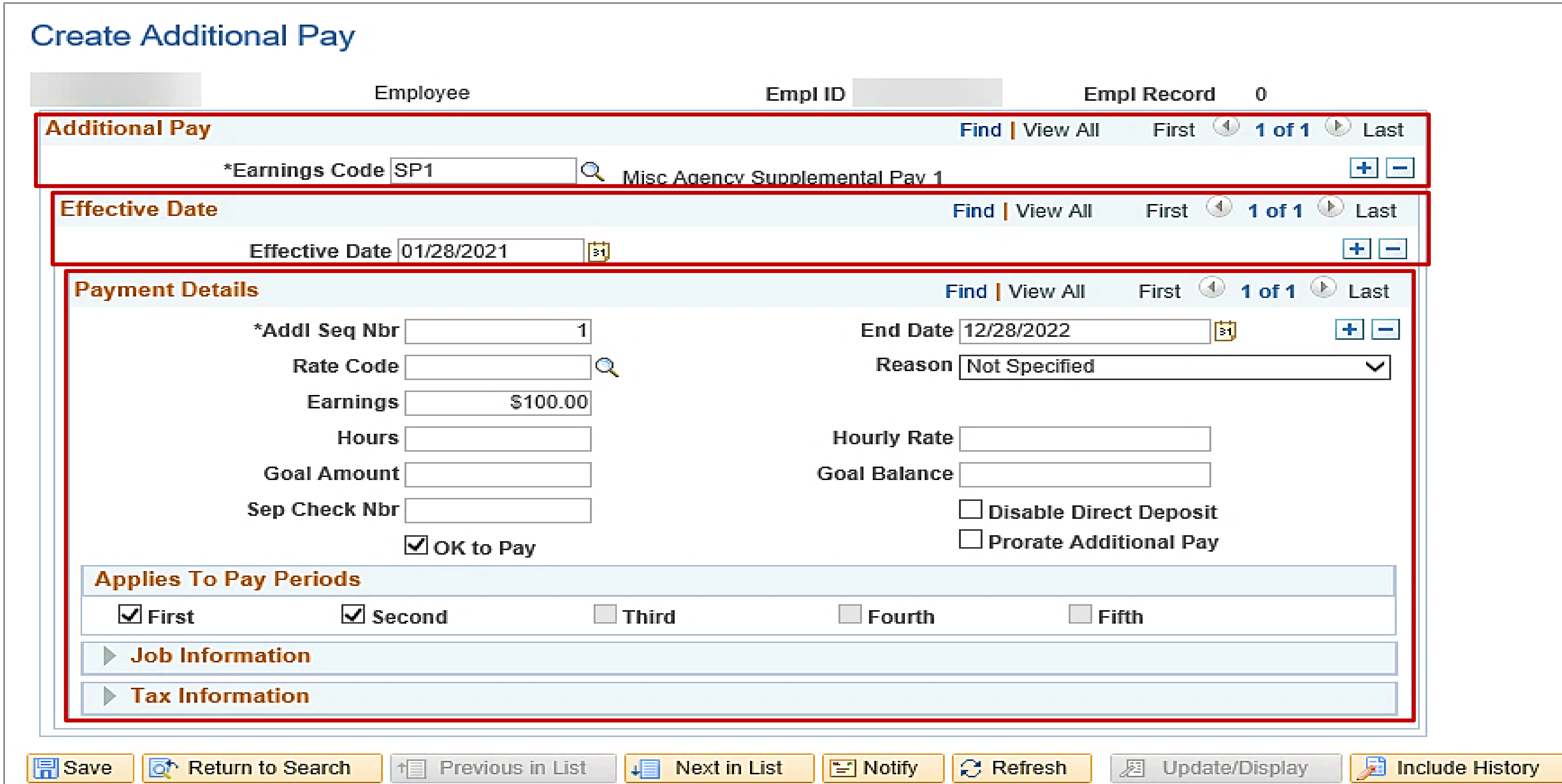
- For partial amounts due to Mid-Pay Period changes:
  - Effective Date is the actual date the additional pay became effective
  - Payroll Admin calculates prorated amount
  - Payroll Admin processes the payment in SPOT

- 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 Overview

Employee Rewards and Recognition include both leave and monetary rewards for an employee.

- These rewards are entered on the **Rewards and Recognition** page and not in Job Data.
- The information entered on the Rewards and Recognition page is for tracking and reporting and does not produce pay for the employee. These reports help ensure compliance with reward limits.
- Leave and monetary rewards entry varies based on whether is a leave or monetary award

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**.

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 – Leave Rewards

Entry of Leave Rewards are entered differently depending on whether the agency is using Cardinal Absence Management or not.

- 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

- 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 works with the Agency Payroll Administrator have these bonus payments paid using the Single Use Payroll Online Tool (SPOT).
  Note: Monetary rewards <u>are not</u> be paid on the **Additional Pay** page.

- 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**.

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.

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

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**.

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

<u>**Navigation**</u>: **Menu > Workforce Development > Performance Management > Performance 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**.

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. Performance ratings can be uploaded for classified employees using the mass upload templates.

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

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

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

Mass HR Data Uploads

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

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

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

	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	

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 and add the functional area, if known (i.e., Cardinal – HR)
- Be sure to include your contact information including an email address and <u>phone number at which you can be reached.</u>
- 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 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.

Please return from break at

Display the coffee cup emoji once you have returned from break.

Please return from lunch at

Display the smiley face emoji of your choice when you have returned.

Welcome back to Day # – HR351: Employee Data Setup and Maintenance

Please use this time to complete any exercise you did not have the opportunity to complete.

The link to the training environment is located on page 1 of your exercise guide, please copy and paste into the browser.

The password for the training environment is **Password123#**

Welcome back to Day 2 – HR351: Employee Data Setup and Maintenance

HR Day 1 Review Activity

1. What is the Job Code for position #DLI00316? 19092
2. What is the Effective Date of the most recent row for this position?

   8/25/2023
3. Who is the current incumbent in this position? Interstate Highway
4. What is the date of the current job data row for the employee in this position? 06/10/2024
5. How many Job Data rows does Counter Top have? 7
6. Does Counter Top use Cardinal Absence? Y
7. What is the effective date for Counter Top's address? 9/23/2022