

### Managing an Inter-Agency Transfer Overview

The Transfer Employee business process refers to the movement of an employee from one position to another position. This Job Aid addresses the following transfer transaction, otherwise known as Inter-Agency Transfers:

- An employee transfers from one state Agency to another state Agency

Coordination between the Sending and Receiving Agencies is imperative as the effective dates and Action/Reasons of the transactions must be entered correctly by both Agencies to prevent inaccurate breaks in service and healthcare. The Sending Agency should enter a Termination/Transfer Out transaction and the Receiving Agency should enter a Hire/Transfer In (XXX) transaction. The Sending Agency enters the transfer date (i.e., termination/transfer out effective date) as the day after last day worked (i.e., transfer date is 1/1/2020, but last day worked was 12/31/2020). The Receiving Agency must use the same date or the next day to prevent a break in service. The DHRM Policy Team recommends the following:

*“The Receiving Agency should consult with the Sending Agency and determine the resignation/separation date. If there is a difference that involves a few days, then we encourage the former agency to approve the employee's use of LWOP and expand the separation date so there is no break in service.”*

If applicable, the Receiving Agency must also update the employee's Agency Provided Email address in Personal Data, update the employee's telework agreement and process a leave balance adjustment.

All salaried employees who are transferring from one Agency to another must be terminated from their Sending Agency prior to being hired into their Receiving Agency. When these employees are in active salaried positions in both Agencies, Anthem, Aetna, and other healthcare providers receive data files that show the employee as active in two Agencies, which results in both records cancelling. When this data mismatch occurs, the healthcare vendors do not receive the updated information regarding the Agency change and the transferring employee loses health benefits coverage.

Transferring an employee from one Agency to another, the Agency Benefits Administrator will need to review benefit elections of the employee once the transfer to the Receiving Agency is complete. See the Job Aid titled **BN361\_Managing Terminations and Transfers** for more details. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

If the Receiving Agency uses Cardinal Absence Management, the HR Administrator of the Receiving Agency should request the salaried employee's leave balances as of the date of transfer from the Sending Agency. Leave balances do not transfer automatically in Cardinal, therefore the Receiving Agency will have to process a balance adjustment in the Time and Attendance module when the transfer is complete. For further details on balance adjustments, see the Job Aid titled **TA374\_Managing Absence Balances**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.



As of 11/11/2022, per DHRM policy, Service Credit for Annual Leave Accruals, the annual leave accrual rate is determined by using state service and a veteran's service in the military, National Guard or Reserves. A Veteran's service is determined by adding the net active service, total prior active service, and total prior inactive service data found on the form DD-214. To assist in identifying employees who are eligible, the RHR294-Disability and Veteran Service Report can be used. In order to run this report, the user must have the manager role due to the disability information on the report.

**Navigation Note:** Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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## Human Resources Job Aid

### HR351\_Managing an Inter-Agency Transfer

#### Revision History

Revision Date	Summary of Changes
4/29/2025	Updated the screenshot of the Benefit Program Participation page ( <a href="#">Section 1</a> , after Step 36), updated the screenshot of the Benefits Administration Eligibility section ( <a href="#">Section 1</a> , step 38), and added additional information regarding the Eligibility Fields.
3/1/2025	Updated the screenshots of the Search pages ( <a href="#">Section 1</a> , after Step 1; <a href="#">Section 2</a> , after Step 1; <a href="#">Section 3</a> , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

### Sending Agency Tasks

#### Termination/Transfer Out

Before beginning, the Sending Agency must coordinate the termination effective date with the Receiving Agency.

Step	Action
1.	Navigate to the <b>Job Data</b> page using the following path: <b>NavBar &gt; Menu &gt; Workforce Administration &gt; Job Information &gt; Job Data</b>

The **Job Data Find an Existing Value** page displays.

**Job Data**  
**Find an Existing Value**  

Recent Searches
Choose from recent searches

Saved Searches
Choose from saved searches

Empl ID
begins with

Empl Record
=

Name
begins with

Last Name
begins with

Second Last Name
begins with



Alternate Character Name
begins with

Middle Name
begins with

Show fewer options

☐ Case Sensitive
☐ Include History
☐ Correct History

Search
Clear

	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b> .
2.	Search for the applicable employee by entering the Employee ID in the <b>Empl ID</b> field. <div> <div> <div> Empl ID begins with </div> </div> <div> Empl Record = </div> </div>
	Users can also search by Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.



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Step	Action
3.	Click the <b>Include History</b> checkbox. <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div>
4.	Click the <b>Search</b> button. <div><div>Search</div><div>Clear</div></div>

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.

Work Location

Job Information

Payroll

Salary Plan

Compensation

Empl ID

Empl Record 0

Employee

Work Location Details ?

\*Effective Date 07/12/2024

Effective Sequence 0

HR Status Active

Payroll Status Active

\*Action Hire

Reason New Hire

\*Job Indicator Primary Job

Go To Row

Position Number CJSTRN01

Analyst

Override Position Data

Position Entry Date 07/12/2024

Position Management Record

Regulatory Region USA

Company CJS

Business Unit 14000

Department 10320

Department Entry Date 07/12/2024

Location CENTR

Establishment ID DCJS

United States

Dept of Criminal Justice Svcs

Dept of Criminal Justice Svcs

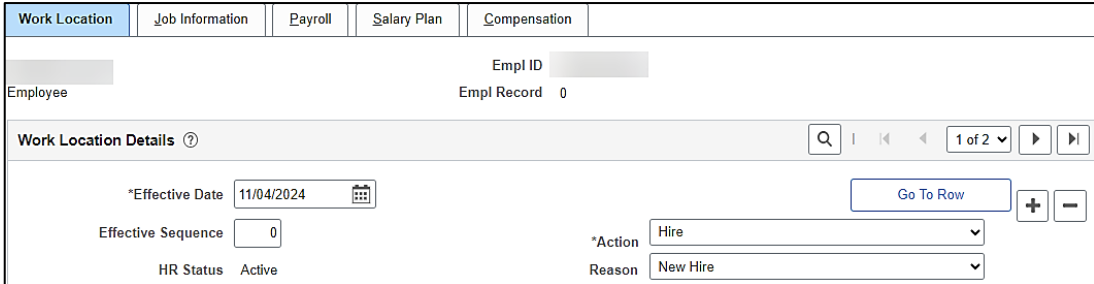

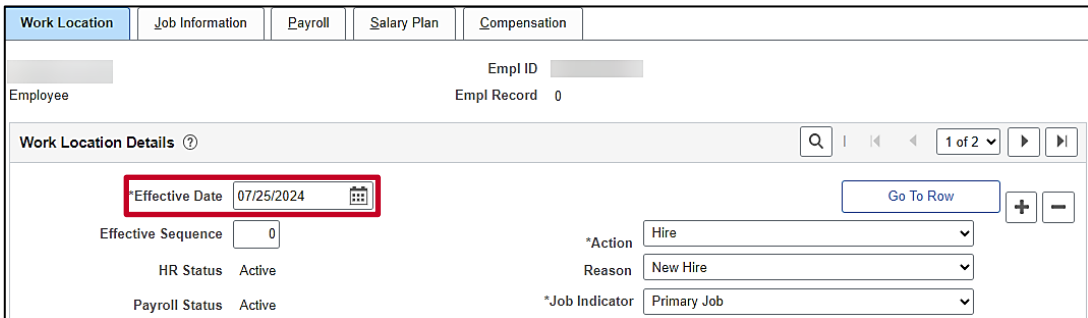

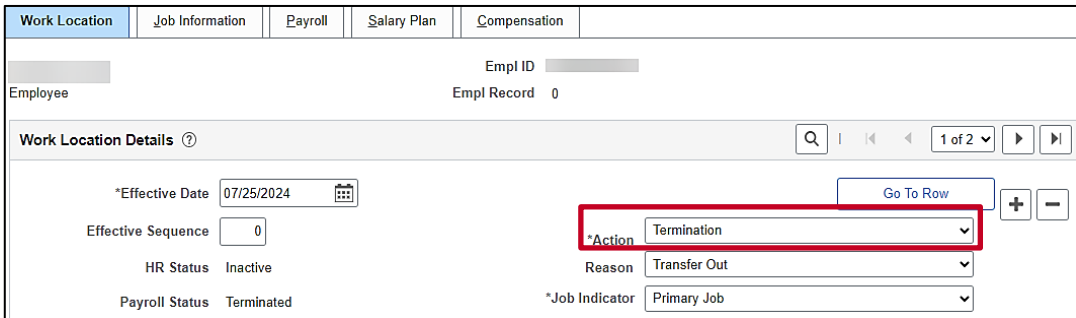
Juvenile Services

Dept of Criminal Justice Serv.

Dept of Criminal Justice Serv.

Date Created 11/04/2024

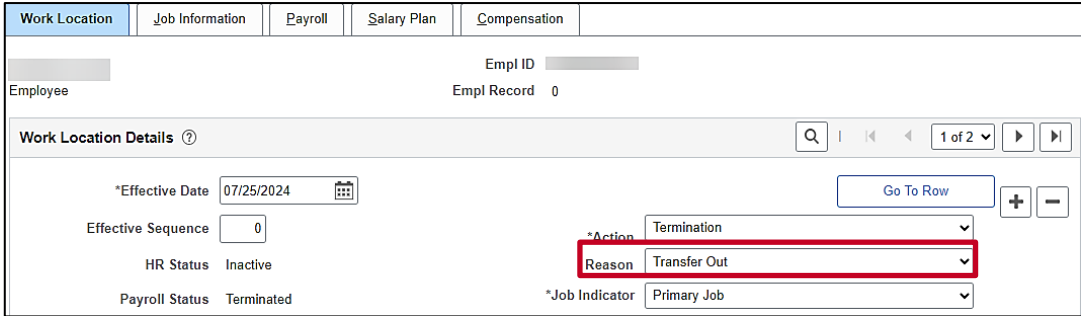
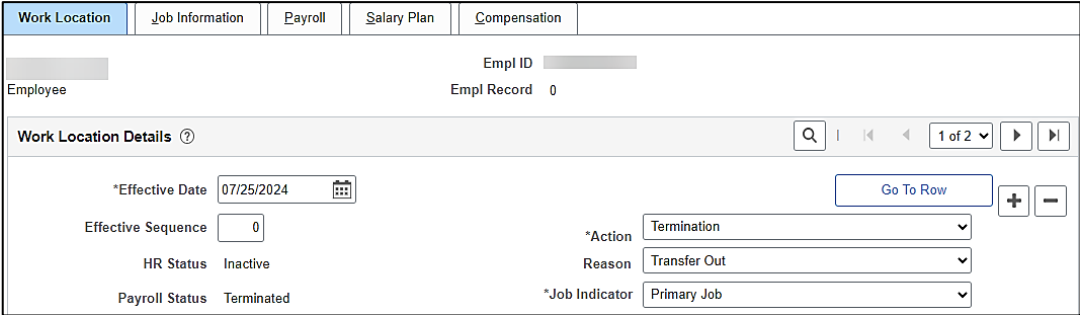

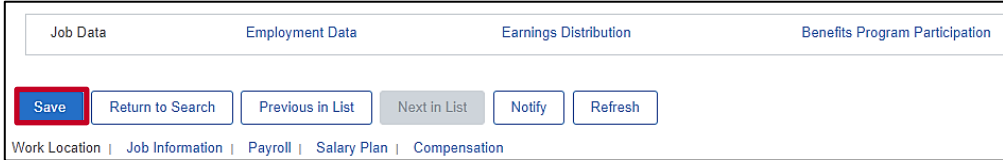
5.	Click the <b>Add a New Row</b> icon (+) to add a new effective dated row. <div><div>Work Location Details ?</div><div>*Effective Date 07/12/2024</div><div>Effective Sequence 0</div><div>HR Status Active</div><div>*Action Hire</div><div>Reason New Hire</div><div>Go To Row</div><div><div>+</div><div>-</div></div></div>
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Step	Action
	<p>The <b>Work Location</b> tab refreshes with a new effective dated row displayed.</p> 
	<p>When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.</p>
6.	<p>The <b>Effective Date</b> field defaults to the current system date. Update to the correct date.</p> 
	<p>Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll).</p> <p>If an employee's last day is 07/24/2024, the effective date of the termination should be 07/25/2024. For further information on effective dating, see the Job Aid titled <b>HR351 Overview of Effective Dating</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
7.	<p>Select the "Termination" option using the <b>Action</b> field dropdown button.</p> 



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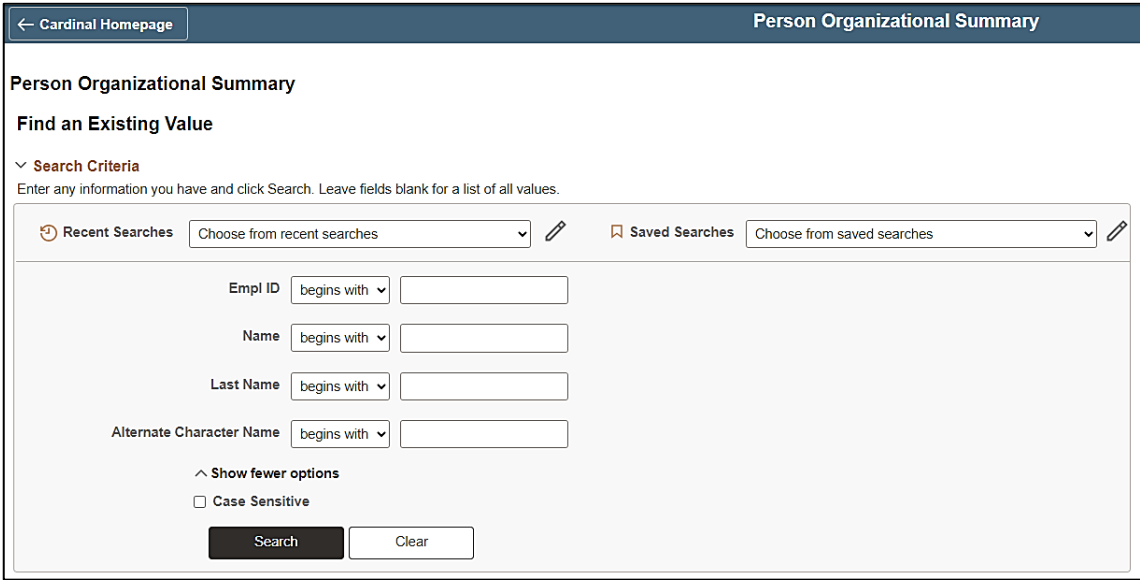

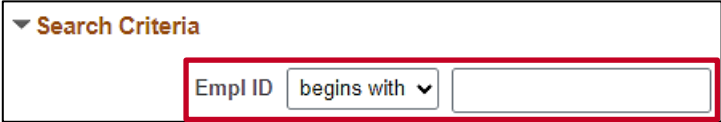

### HR351\_Managing an Inter-Agency Transfer

Step	Action
8.	<p>Select the “Transfer Out” reason using the <b>Reason</b> field dropdown button.</p> 
<p>The <b>Job Data</b> page refreshes.</p> 	
9.	<p>After selecting the <b>Action</b> and <b>Reason</b>, the <b>HR Status</b> and <b>Payroll Status</b> fields automatically update. Validate that the HR status displays as <b>Inactive</b> and the Payroll status displays as <b>Terminated</b>.</p> 
10.	<p>Click the <b>Save</b> button at the bottom of the page.</p> 

### Receiving Agency Tasks

#### Reviewing Person Organizational Summary

The Receiving Agency must review the **Person Organizational Summary** page to ensure the Sending Agency has processed the termination transaction to transfer the employee out of their agency.

Step	Action
1.	<p>Navigate to the <b>Person Organizational Summary</b> page using the following path:  <b>NavBar &gt; Menu &gt; Workforce Administration &gt; Personal Information &gt; Person Organizational Summary</b></p> <p>The <b>Person Organizational Summary Find an Existing Value</b> page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b>.</p>
2.	<p>Enter the employee's ID in the <b>Empl ID</b> field.</p> 
3.	<p>Click the <b>Search</b> button.</p> 



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Step	Action
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The **Person Organizational Summary** page displays the employee's Empl Records in order starting with Empl Record 0.

Person Organizational Summary

Person ID

Employment Instances

ORG Instance 0 Last Hire 07/12/2024 Termination Date 07/24/2024  
HR Status Inactive Payroll Status Terminated

Assignments

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	07/25/2024	14000	07/12/2024	Classified Salary	07/24/2024	Termination	Transfer Out	92313		Term W/Ben

Return to Search Notify



To navigate to the desired Empl Record, if there are more than one, use the navigational arrows or **View All** link in the top right portion of the page.

4.

Review the information and validate it is consistent with the information obtained from the Sending Agency. If the information is not consistent, contact the Sending Agency and/or employee. At a minimum, the following information should be reviewed:

- Person ID** field: Employee ID displayed at the top of the page. Make a note of the Employee ID as it will be needed to complete the transfer action.
- HR Status** field: Should be **Inactive**. If it is "Active", contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction.
- Payroll Status** field: Should be **Terminated**. If the status is not **Terminated**, contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction.
- Date Last Change** field: This should match the agreed upon Effective Date.

Person Organizational Summary


Person ID

Employment Instances

ORG Instance 0 Last Hire 07/12/2024 Termination Date 07/24/2024  
HR Status Inactive Payroll Status Terminated

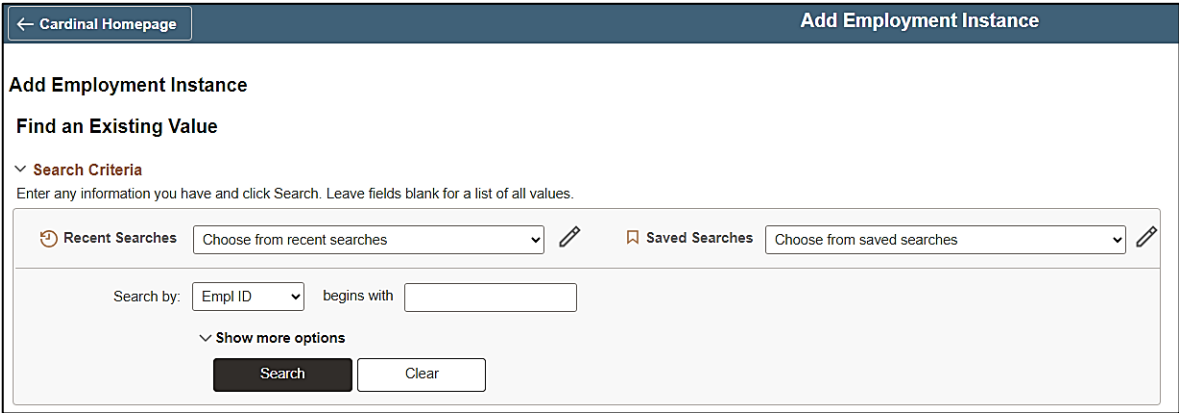

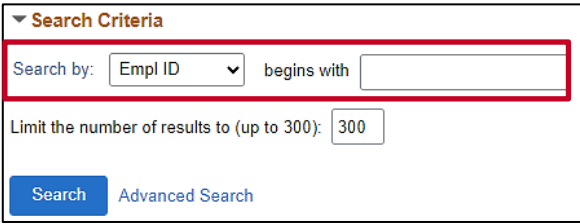

Assignments


Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date
0	Inactive	Terminated	07/25/2024	14000	07/12/2024	Classified Salary	07/24/2024

Step	Action
	The Sending and Receiving Agencies <b>MUST</b> coordinate the effective date of termination and hire/rehire to prevent a break in service. To evaluate the impact of a possible break in service, see the Job Aid titled <b>HR351 Managing Service Dates and Breaks in Service</b> . This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .
5.	Continue with the hire/rehire action if the record is as expected and the Sending Agency completed the termination action. If the record is not as expected or if the Sending Agency has not completed the termination action, reach out to the Sending Agency to verify the status and effective date before updating the employee's Job Data.

### Updating the Employee Job Data

Validate the position information is correct prior to updating the employee's Job Data. If the position data is incorrect, cancel the action and make corrections to the position before assigning the employee to the position.


Step	Action
1.	<p>Navigate to the <b>Add Employment Instance</b> page using the following path:  <b>NavBar &gt; Menu &gt; Workforce Administration &gt; Personal Information &gt; Organizational Relationship &gt; New Employment Instance</b></p> <p>The <b>Add Employment Instance Find an Existing Value</b> page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b>.</p>
2.	<p>Enter the employee's Employee ID into the <b>Search by</b> field.</p> 
3.	<p>Click the <b>Search</b> button.</p> 

Step	Action
	<p>The following message displays in a pop-up window.</p> <div data-bbox="349 378 1291 577"> <p>Do you wish to open the Job Data associated to this emplid: <span style="background-color: #cccccc; padding: 0 20px;"> </span> Employee Record: 0 (25101,91)</p> <div> <input type="button" value="Yes"/> <input type="button" value="No"/> </div> </div>
4.	<p>The employee may require a new employment instance for an Inter-Agency transfer. If the employee has never worked for this agency click the <b>No</b> button to create a new employment instance.</p> <div data-bbox="292 735 1031 892"> <p>Do you wish to open the Job Data associated to this emplid: <span style="background-color: #cccccc; padding: 0 20px;"> </span> Employee Record: 0 (25101,91)</p> <div> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> </div> </div>
<div data-bbox="170 1239 235 1302" style="text-align: center;">  </div>	<p>For guidance on how to answer this question, review the following scenarios below:</p> <p><b>Scenario 1:</b> Click the <b>No</b> button if the employee is being transferred into a different agency or transferred into a new position at the same agency but into a different employee type (i.e., wage to salaried). The <b>New Employment Instance</b> page displays and clicking the <b>Add Relationship</b> button creates a new employee record that the employee can be hired into. Refer to the Job Aid titled <b>HR351 Completing a New Hire</b>. Instead of using <b>Action/Reason</b> of Hire/New Hire, use the <b>Action</b> of Hire and applicable Transfer In <b>Reason</b> code. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p> <div data-bbox="292 1228 1031 1386"> <p>Do you wish to open the Job Data associated to this emplid: <span style="background-color: #cccccc; padding: 0 20px;"> </span> Employee Record: 0 (25101,91)</p> <div> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> </div> </div> <p><b>Scenario 2:</b> Click the <b>Yes</b> button if the employee is being rehired into the same agency and back into the same employee type (i.e., wage to wage). This hires the employee back into the same employee record they had previously.</p> <div data-bbox="292 1522 1031 1680"> <p>Do you wish to open the Job Data associated to this emplid: <span style="background-color: #cccccc; padding: 0 20px;"> </span> Employee Record: 0 (25101,91)</p> <div> <input style="border: 2px solid red;" type="button" value="Yes"/> <input type="button" value="No"/> </div> </div>



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Step	Action
	<p>The <b>New Employment Instance</b> page displays when the user clicks the <b>No</b> button.</p> <div><div>&lt; Person Org Summary</div><div>Add Employment Instance</div><div><div>New Employment Instance</div><div>Empl ID <input type="text"/></div><div>Empl Record 1</div><div>Add Relationship</div></div></div>
5.	<p>Click the <b>Add Relationship</b> button.</p> <div><div>New Employment Instance</div><div>Empl ID <input type="text"/></div><div>Empl Record 1</div><div>Add Relationship</div></div>
	<p>The Employee Record increments to the next sequential number.</p>
	<p>The <b>Add Employment Instance</b> page refreshes and the <b>Work Location</b> tab is displayed by default.</p> <div><div><div>Work Location</div><div>Job Information</div><div>Job Labor</div><div>Payroll</div><div>Salary Plan</div><div>Compensation</div></div><div><div>Employee</div><div>Empl ID <input type="text"/></div><div>Empl Record 1</div></div><div><div>Work Location Details ?</div><div>Q   &lt; &gt; 1 of 1 &gt;&gt;</div><div><div>*Effective Date 11/04/2024</div><div>Effective Sequence 0</div><div>HR Status Active</div><div>Payroll Status Active</div><div>Calculate Status and Dates</div></div><div><div>*Action Hire</div><div>Reason</div><div>*Job Indicator Primary Job</div></div><div><div>Go To Row</div><div>+</div><div>-</div></div><div><div>Position Number</div><div>Current</div><div>Override Position Data</div></div><div><div>Position Entry Date</div><div>Position Management Record</div><div>*Regulatory Region USA</div><div>*Company</div><div>*Business Unit 15100</div><div>United States</div><div>Department of Accounts</div></div></div></div>



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Step	Action
6.	<p>The <b>Effective Date</b> field defaults to the current system date. Update this date to the applicable date of transfer. The <b>Action</b> field defaults to <b>Hire</b>; no other options are available.</p> <div><div>*Effective Date07/25/2024</div><div>Go To Row</div><div>Effective Sequence0</div><div>*ActionHire</div><div>HR StatusActive</div><div>Reason</div></div>
	<p>Classified/VPA employees cannot have a break in service between the Termination and Hire/Rehire actions. Refer to DHRM Policy 2.10, Hiring, for additional guidance.</p>
7.	<p>Click the <b>Reason</b> field drop-down button and select from one of the <b>Transfer In</b> reasons.</p> <div><div>*Effective Date07/25/2024</div><div>Go To Row</div><div>Effective Sequence0</div><div>*ActionHire</div><div>HR StatusActive</div><div>ReasonTransfer In Comp Lateral</div></div>
	<p>For further information on valid Action and Reason code combinations and a PMIS crosswalk, see the Job Aid titled <b>HR351 Action Reason Codes</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
8.	<p>Enter the Position Number in the <b>Position Number</b> field and click the Tab key.</p> <div>Position Number</div>

The **Work Location** tab refreshes.

Work LocationJob InformationJob LaborPayrollSalary PlanCompensation

Empl ID  
EmployeeEmpl Record 1

Work Location Details ?

\*Effective Date07/25/2024

Effective Sequence0

HR StatusActive

Payroll StatusActive

Calculate Status and Dates

\*ActionHire

ReasonTransfer In Comp Lateral

\*Job IndicatorPrimary Job

Go To Row

Position NumberDLITRN01

Analyst

Override Position Data

Position Entry Date07/25/2024

Position Management Record

Regulatory RegionUSA

United States

CompanyDLI

Dept of Labor and Industry

Business Unit18100

Dept of Labor and Industry

Department18100

DEPT OF LABOR AND INDUSTRY

Department Entry Date07/25/2024

LocationCENTR

Dept of Labor and Industry

Establishment IDDOLI


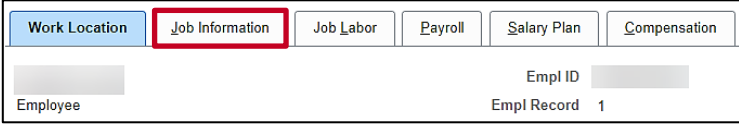
Dept of Labor and Industry

Date Created11/04/2024

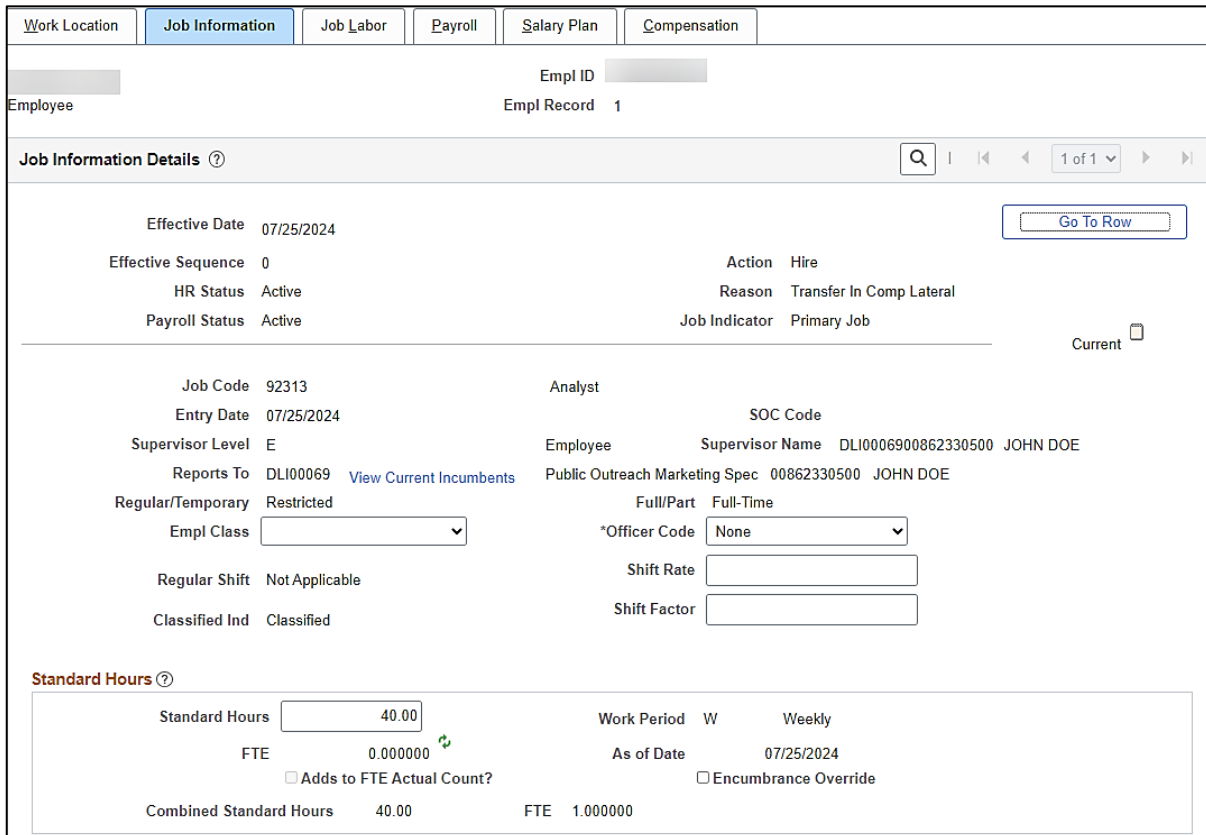


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Step	Action
9.	The remaining information populates based on the Position Number entered/selected. Review the information.
	<p><b>Note:</b> If the position data is not correct (this includes verifying whether the position is eligible for telework), cancel the action, and make corrections to the position before assigning the employee to the position.</p> <p>For more information on reviewing position data, see the Job Aids titled <b>HR351_Managing a Position</b> and <b>HR351_Managing an Employee's Telework Data</b>. These Job Aids can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
10.	<p>If the Position Data is correct, click the <b>Job Information</b> tab.</p> 

The **Job Information** tab displays.



The screenshot displays the 'Job Information' tab in a web application. At the top, there are tabs for 'Work Location', 'Job Information' (selected), 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below the tabs, there are input fields for 'Employee' and 'Empl ID', and a label 'Empl Record 1'. The main section is titled 'Job Information Details' and contains a search bar and a 'Go To Row' button. The details are organized into several sections: 'Effective Date' (07/25/2024), 'Effective Sequence' (0), 'HR Status' (Active), 'Payroll Status' (Active), 'Action' (Hire), 'Reason' (Transfer In Comp Lateral), 'Job Indicator' (Primary Job), 'Current' (checkbox), 'Job Code' (92313), 'Entry Date' (07/25/2024), 'Supervisor Level' (E), 'Reports To' (DLI00069), 'Regular/Temporary' (Restricted), 'Empl Class' (dropdown), 'Regular Shift' (Not Applicable), 'Classified Ind' (Classified), 'Analyst', 'SOC Code', 'Employee' (Supervisor Name: DLI0006900862330500 JOHN DOE), 'Public Outreach Marketing Spec' (00862330500 JOHN DOE), 'Full/Part' (Full-Time), '\*Officer Code' (None), 'Shift Rate' (input field), 'Shift Factor' (input field), 'Standard Hours' (40.00), 'FTE' (0.000000), 'Work Period' (W Weekly), 'As of Date' (07/25/2024), 'Combined Standard Hours' (40.00), and 'FTE' (1.000000). There are also checkboxes for 'Adds to FTE Actual Count?' and 'Encumbrance Override'.


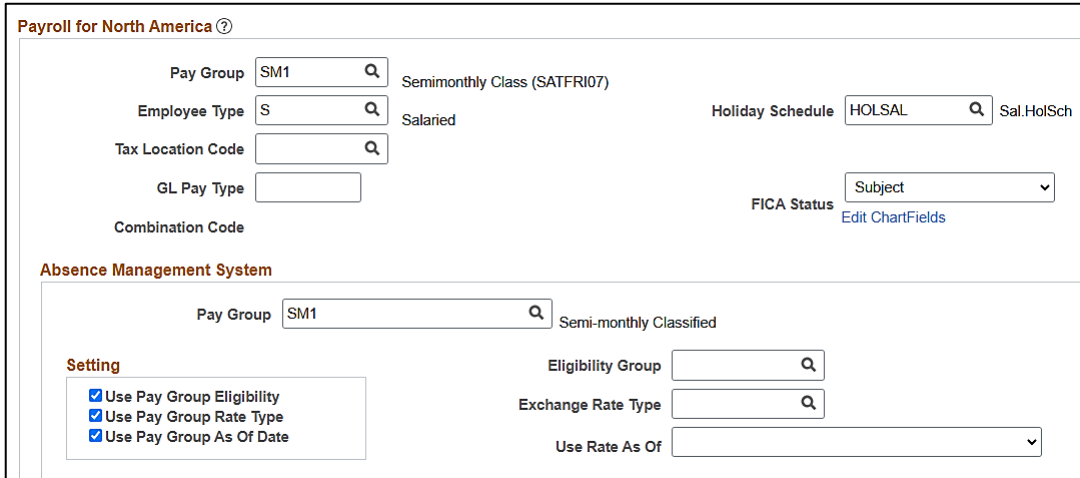

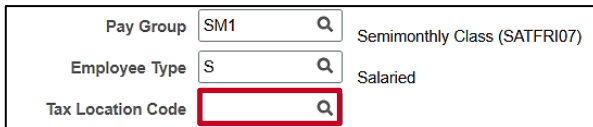

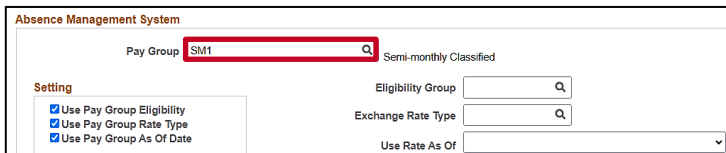
Step	Action
11.	Most information on the <b>Job Information</b> tab is related to the position. Review the information; if the information is not correct, cancel the action and make corrections to the position before assigning the employee to the position.
12.	<p>Click the <b>Empl Class</b> dropdown button and select the applicable Classification. The following classifications are available for selection:</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Adjunct  Admin/Prof  Agncy Hd  Classified  Emerg Hrly  FedWrkStdy  Grad Asst  LODA Em  LTD  LegiAssist  Non Class  ORP CNV  Othr Offcl  Ret EE  Ret Judge  SPORS  StWrkStdy  Student  Sub Judge  TLC EE  TchResrch  Uemply  VALORS  Wage  Wage NE </div>
	<p>The <b>Action/Reason</b>, <b>Employee Class</b>, and <b>Job Code</b> are key fields in the VRS file nightly extract from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if the incorrect data is entered. For further information on selecting the appropriate employee classification, see the Job Aid titled <b>HR351 Employee Class Overview</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
13.	<p>Click the <b>Payroll</b> tab.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> <span>Work Location</span> <span style="background-color: #e6f2ff; padding: 2px 5px;">Job Information</span> <span>Job Labor</span> <span style="border: 2px solid red; padding: 2px 5px;">Payroll</span> <span>Salary Plan</span> <span>Compensation</span> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="border: 1px solid black; width: 150px; height: 20px; background-color: #d3d3d3;"></div> <div>Empl ID <span style="border: 1px solid black; width: 60px; height: 20px; background-color: #d3d3d3;"></span></div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <span>Employee</span> <span>Empl Record 1</span> </div> </div>



## Human Resources Job Aid

### HR351\_Managing an Inter-Agency Transfer

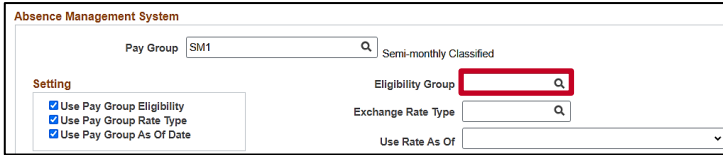

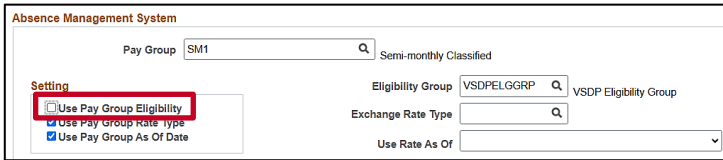
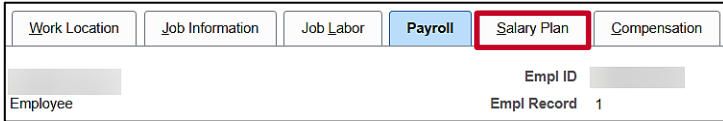
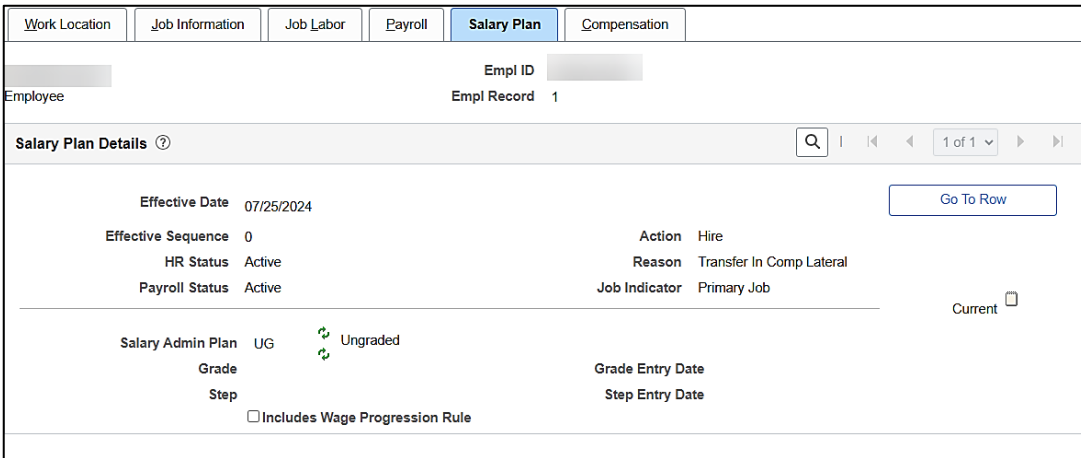
Step	Action
	<p>The <b>Payroll</b> tab displays.</p> <div></div>
14.	<p>The <b>Absence System</b> field defaults to “Other”. Keep the default of “Other” if the employee is Wage. If the employee is salaried and their Agency uses Cardinal Absence Management, click the dropdown button and select “Absence Management”.</p> <div></div>
	<p>The <b>Absence Management</b> section is visible only if “Absence Management” is selected in the <b>Absence System</b> field, otherwise this section is hidden.</p>
15.	<p>Select the applicable Pay Group in the <b>Pay Group</b> field within the <b>Payroll for North America</b> section.</p> <div></div>

Step	Action
	<p>The options available within the <b>Pay Group</b> field are driven by the type of Absence System selected. It is important to complete this page in order from top to bottom.</p> <p>FICA Status defaults to “Subject” for regular Social Security and Medicare tax withholdings. Update this value to “Exempt” if the employee is exempt from both Social Security and Medicare tax withholdings or “Medicare only” if the employee is only subject to Medicare tax withholdings.</p>
	<p>The <b>Payroll</b> tab refreshes.</p> <div data-bbox="277 625 1351 1100">  </div>
	<p>The <b>Employee Type</b> and <b>Holiday Schedule</b> fields default based on the Pay Group selection. The <b>Absence Management System</b> section only displays if “<b>Absence Management</b>” is selected in the <b>Absence System</b> field.</p>
16.	<p>Enter the applicable Tax Location Code (previously known as the FIPS code) in the <b>Tax Location Code</b> field.</p> <div data-bbox="289 1354 878 1480">  </div>
	<p>Updates made to the <b>Tax Location Code</b> will update the <b>Tax Data</b> pages in the Payroll module.</p>
17.	<p>Select the same Pay Group in the <b>Pay Group</b> field within the <b>Absence Management System</b> section as was selected in the <b>Pay Group</b> field within the <b>Payroll for North America</b> section if the Pay Group is not auto populated.</p> <div data-bbox="289 1747 1010 1898">  </div>



## Human Resources Job Aid


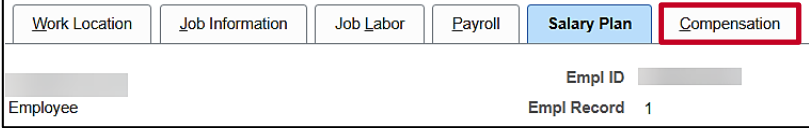
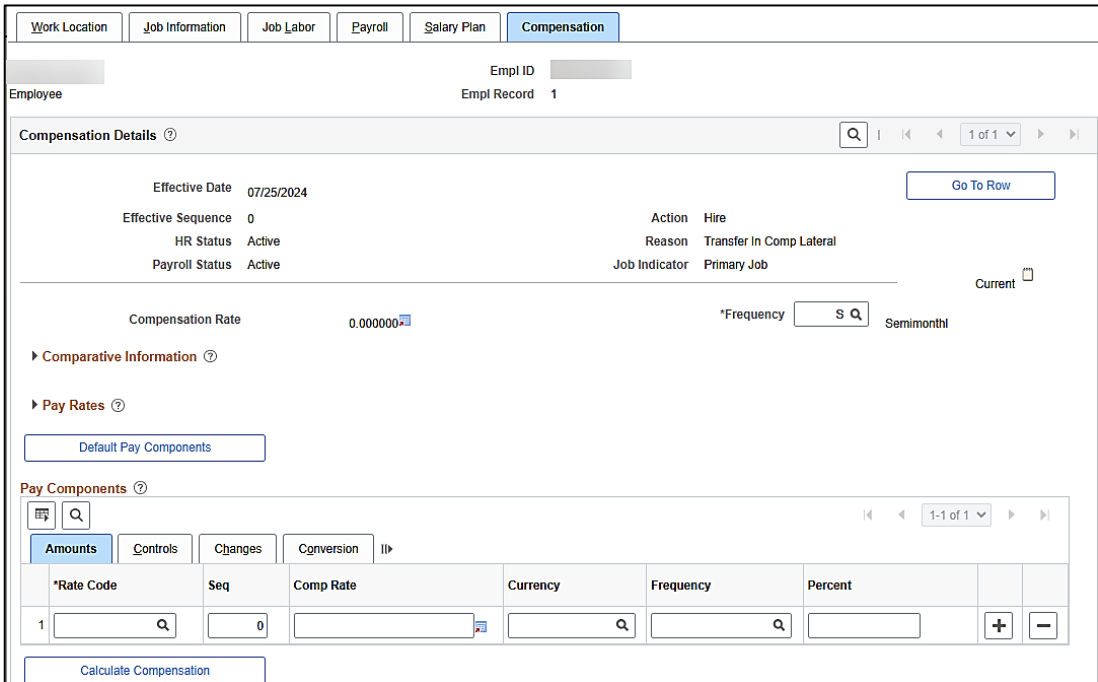

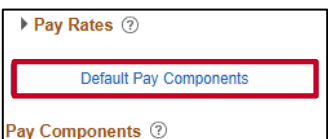
### HR351\_Managing an Inter-Agency Transfer

Step	Action
18.	<p>Select the appropriate eligibility group in the <b>Eligibility Group</b> field.</p> 
	<p>For further information on updating the <b>Eligibility Group</b> field, see the Job Aid titled <b>TA374_Absence Management Leave Types and Eligibility</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
19.	<p>De-select the <b>Use Pay Group Eligibility</b> checkbox.</p> 
20.	<p>Once the payroll information is entered, click the <b>Salary Plan</b> link at the top of the page.</p> 
<p>The <b>Salary Plan</b> tab displays.</p> 	
21.	<p>Review the salary plan information. If the salary plan information is not correct, cancel the action and make corrections to the position before assigning the employee to the position. The <b>Salary Admin Plan/Grade</b> fields may change for the employee if this action is a promotion or demotion.</p>



## Human Resources Job Aid

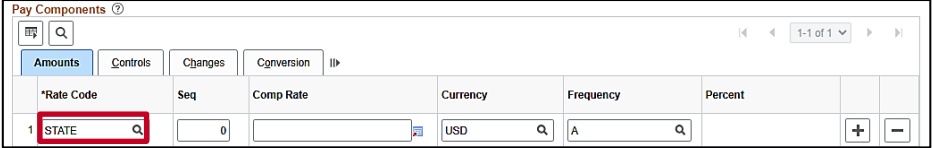
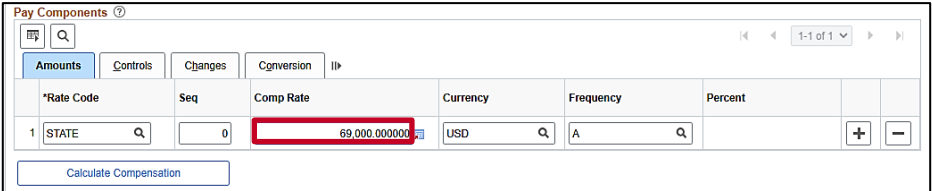

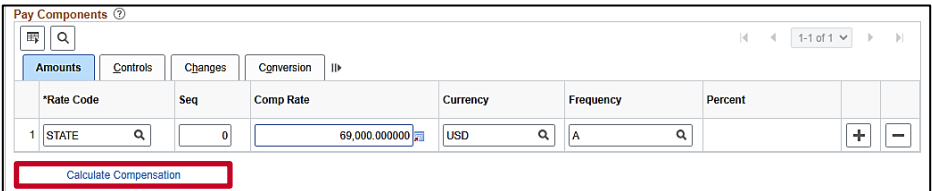
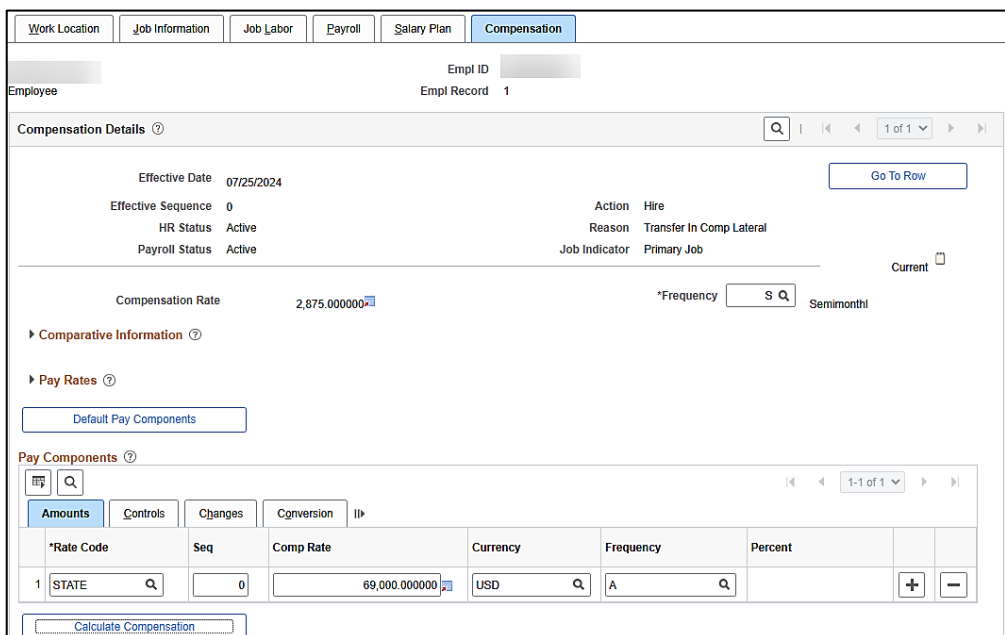
### HR351\_Managing an Inter-Agency Transfer

Step	Action
	For further information on updating Position Data, see the Job Aid titled <b>HR351_Managing a Position</b> . This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b> .
22.	<p>If the salary plan information is correct, click the <b>Compensation</b> tab.</p>  <p>The screenshot shows a navigation bar with tabs: Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The Compensation tab is highlighted with a red border. Below the tabs, there are fields for Employee, Empl ID, and Empl Record 1.</p>
<p>The <b>Compensation</b> tab displays.</p>  <p>The screenshot shows the Compensation tab details. It includes fields for Effective Date (07/25/2024), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Hire), Reason (Transfer In Comp Lateral), Job Indicator (Primary Job), and Compensation Rate (0.000000). There is a *Frequency field with a dropdown menu showing 'S' and 'Semimonthly'. Below this is a section for Pay Rates with a button for Default Pay Components. At the bottom, there is a table for Pay Components with columns for Rate Code, Seq, Comp Rate, Currency, Frequency, and Percent. A Calculate Compensation button is also visible.</p>	
23.	<p>Select the applicable pay frequency in the <b>Frequency</b> field.</p>  <p>The screenshot shows the *Frequency field with a dropdown menu. The letter 'S' is selected and highlighted with a red border. The text 'Semimonthly' is displayed next to the dropdown.</p>
24.	<p>Click the <b>Default Pay Components</b> button.</p>  <p>The screenshot shows the Default Pay Components button highlighted with a red border. It is located below the Pay Rates section.</p>



# Human Resources Job Aid

## HR351\_Managing an Inter-Agency Transfer

Step	Action
25.	Select the applicable rate code in the <b>Rate Code</b> field. 
26.	Enter the employee's annual salary or hourly rate in the <b>Comp Rate</b> field. 
	The <b>Currency</b> and <b>Frequency</b> fields default based on the Rate Code selected. Frequency for Salaried will be <b>A</b> and Frequency for Hourly will be <b>H</b> .
27.	Click the <b>Calculate Compensation</b> button. 
The <b>Compensation</b> page refreshes. 	



## Human Resources Job Aid


### HR351\_Managing an Inter-Agency Transfer

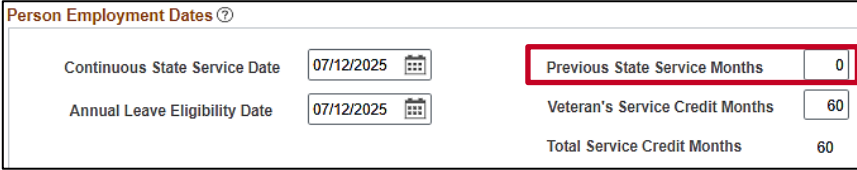
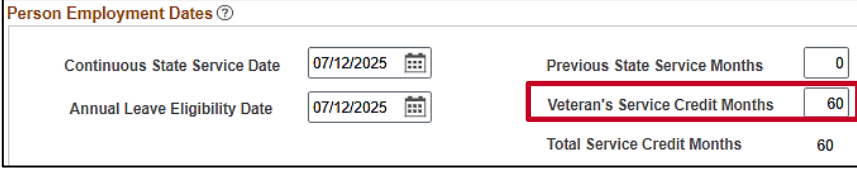


Step	Action				
28.	<p>Click the <b>Employment Data</b> link at the bottom of the page.</p> <div><div>Job Data</div><div>Employment Data</div><div>Earnings Distribution</div><div>Benefits Program Participation</div></div>				
<p>The <b>Employment Information</b> page displays.</p> <div><div>Employment Information</div><div><div>Employee</div><div>Empl ID <div></div> Empl Record 1</div></div><div><b>Organizational Instance</b> <span>?</span><div><div>Organizational Instance Rcd 1</div><div>Original Start Date <input type="checkbox"/> Override</div><div>Last Start Date</div><div>First Start Date</div><div>Termination Date</div><div>Org Instance Service Date <input type="checkbox"/> Override</div><div>Years Months Days</div><div><div></div>0 0 0</div></div></div><div><b>Organizational Assignment Data</b> <span>?</span><div><div>Instance Record</div><div><div>Last Assignment Start Date 11/05/2024</div><div>Assignment End Date</div><div>Home/Host Classification Home</div><div>Company Seniority Date <input type="checkbox"/> Override</div><div>Benefits Service Date <input type="checkbox"/> Override</div><div>Seniority Pay Calc Date <input type="checkbox"/> Override</div><div>VSDP Sick/PER Leave Effrt Date 07/12/2030</div><div>Probation Date <div></div></div><div>Business Title Analyst</div><div>*Employee Eligible for Telework? <div>Employee Eligible for Telework</div> Tenure Status/Contract Type <div></div></div></div><div><div>First Assignment Start 11/05/2024</div><div>Years Months Days</div><div><div></div>0 0 0</div><div><div></div>0 0 0</div><div><div></div>0 0 0</div><div><div></div>0 0 0</div><div>Last Verification Date <div></div></div></div></div></div></div> <tr><td></td><td><div><div><div>i</div><div><p>Before recording the employee’s telework status, the Agency HR administrator should verify and/or update the following if the employee will be teleworking:</p><ul style="list-style-type: none"><li>The <b>Available for Telework</b> field = “Yes” on the employee’s position record</li></ul><p>For further information on selecting the appropriate telework option, see the Job Aid titled <b>HR351_Managing Employee Teleworker Data</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p></div></div></div></td></tr> <tr><td>29.</td><td><p>Select the appropriate value for the <b>*Employee Eligible for Telework</b> field.</p><div><div><div>*Employee Eligible for Telework?</div><div>Employee Eligible for Telework</div></div><div><div>Alternate Leave Plan <div></div></div><div><input type="checkbox"/> Alternate Work Schedule</div></div><div><div>VSDP Enroll Date 07/12/2025</div><div><div></div></div></div></div></td></tr>			<div><div><div>i</div><div><p>Before recording the employee’s telework status, the Agency HR administrator should verify and/or update the following if the employee will be teleworking:</p><ul style="list-style-type: none"><li>The <b>Available for Telework</b> field = “Yes” on the employee’s position record</li></ul><p>For further information on selecting the appropriate telework option, see the Job Aid titled <b>HR351_Managing Employee Teleworker Data</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p></div></div></div>	29.	<p>Select the appropriate value for the <b>*Employee Eligible for Telework</b> field.</p> <div><div><div>*Employee Eligible for Telework?</div><div>Employee Eligible for Telework</div></div><div><div>Alternate Leave Plan <div></div></div><div><input type="checkbox"/> Alternate Work Schedule</div></div><div><div>VSDP Enroll Date 07/12/2025</div><div><div></div></div></div></div>
	<div><div><div>i</div><div><p>Before recording the employee’s telework status, the Agency HR administrator should verify and/or update the following if the employee will be teleworking:</p><ul style="list-style-type: none"><li>The <b>Available for Telework</b> field = “Yes” on the employee’s position record</li></ul><p>For further information on selecting the appropriate telework option, see the Job Aid titled <b>HR351_Managing Employee Teleworker Data</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p></div></div></div>				
29.	<p>Select the appropriate value for the <b>*Employee Eligible for Telework</b> field.</p> <div><div><div>*Employee Eligible for Telework?</div><div>Employee Eligible for Telework</div></div><div><div>Alternate Leave Plan <div></div></div><div><input type="checkbox"/> Alternate Work Schedule</div></div><div><div>VSDP Enroll Date 07/12/2025</div><div><div></div></div></div></div>				



## Human Resources Job Aid

### HR351\_Managing an Inter-Agency Transfer

Step	Action
30.	<p>If the Agency does not use Cardinal Absence Management, the <b>Alternate Leave Plan</b> field must be completed based on the employee's leave program (i.e., VSDP Elig Group) in order for the employee to have a complete Total Compensation statement in Cardinal ESS.</p> <div><div>*Employee Eligible for Telework?<div>Employee Eligible for Telework</div></div><div><div>Alternate Leave Plan</div><div>Alternate Work Schedule</div></div><div>VSDP Enroll Date<div>07/12/2025</div></div></div>
31.	<p>Enter the enrollment date in the <b>VSDP Enroll Date</b> fields. This field is provided to VNAV and is used by the VSDP vendor to determine the program enrollment date.</p> <div><div>*Employee Eligible for Telework?<div>Employee Eligible for Telework</div></div><div><div>Alternate Leave Plan</div><div>Alternate Work Schedule</div></div><div>VSDP Enroll Date<div>07/12/2025</div></div></div>
32.	<p>Enter the original hire date in the <b>Continuous State Service Date</b> field. This field is used to determine eligibility for legislative pay increases for all salaried employees, as well as severance, benefits at layoff for VPA covered employees (if applicable).</p> <div><div>Person Employment Dates ?</div><div><div>Continuous State Service Date<div>07/12/2025</div></div><div>Annual Leave Eligibility Date<div>07/12/2025</div></div><div>Previous State Service Months<div>0</div></div><div>Veteran's Service Credit Months<div>60</div></div><div>Total Service Credit Months<div>60</div></div></div></div>
33.	<p>Enter the original hire date in the <b>Annual Leave Eligibility Date</b> field. This field must be updated for all VPA covered employees and salaried employees for agencies that use Cardinal's Absence Management and auto populates the <b>Company Seniority Date</b> field.</p> <div><div>Person Employment Dates ?</div><div><div>Continuous State Service Date<div>07/12/2025</div></div><div>Annual Leave Eligibility Date<div>07/12/2025</div></div><div>Previous State Service Months<div>0</div></div><div>Veteran's Service Credit Months<div>60</div></div><div>Total Service Credit Months<div>60</div></div></div></div>
	<p>If a correction is needed for the <b>Annual Leave Eligibility Date</b>, use the Action Reason combination of <b>DTA / LED</b> and then enter the correct date. For further information on Action Reasons, refer to the Job Aid titled <b>HR351 Action Reason Codes</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>

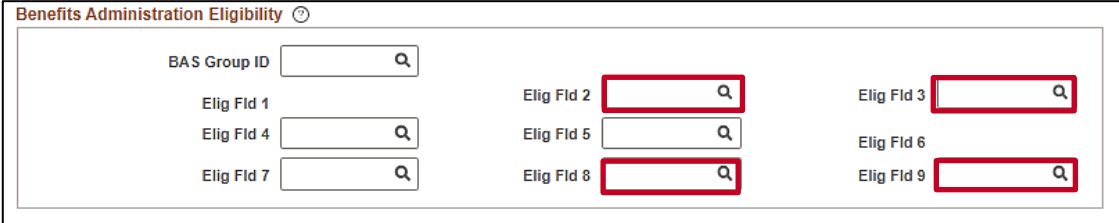

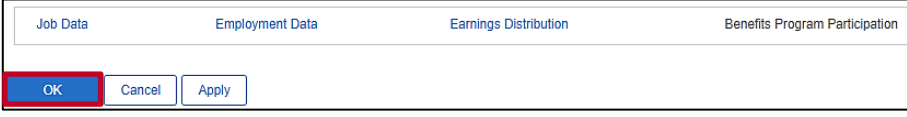
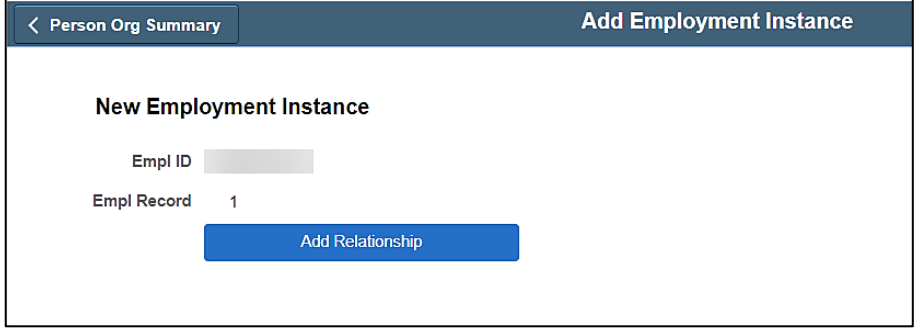
Step	Action
34.	<p>Enter the service months in the <b>Previous State Service Months</b> field. This field is used when there is a break in service (Rehires only). For further information on breaks in service, refer to the Job Aid titled <b>HR351 Managing Service Dates and Breaks in Service</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p> 
35.	<p>Enter the months of veteran's service in the <b>Veterans Service Credit Months</b> field if applicable.</p> 
	<p>The annual leave accrual is determined by using state service and veteran's service in the military, National Guard, or Reserves. When entering Veterans Service Credit Months, agencies must also populate the <b>Leave Eligibility Service Date</b> field. Failing to do so will result in a delivered PeopleSoft Error code upon save.</p> <p>The <b>Total Service Credit Months</b> field is a read only field. It is auto populated as the sum of the veteran's service credit months and the previous state service months. It is used to determine the annual leave eligibility date when there is a break in service or veteran's service applies.</p> <p>For a detailed description of the date fields on the <b>Employment Information</b> page, refer to the Job Aid titled <b>HR351 Managing Service Dates and Breaks in Service</b>. This Job Aid can be found on the Cardinal website in the <b>Job Aids</b> under <b>Learning</b>.</p>
36.	<p>Click the <b>Benefits Program Participation</b> link at the bottom of the page.</p> 



## Human Resources Job Aid

### HR351\_Managing an Inter-Agency Transfer

Step	Action
	<p>The <b>Benefit Program Participation</b> page displays.</p> <div><div><b>Benefit Program Participation</b></div><div><div>Employee</div><div>Empl ID</div><div>Empl Record 1</div></div><div><div>Benefit Status</div><div>Benefit Record Number 0</div><div>Effective Date 04/25/2025</div><div>Effective Sequence 0</div><div>HR Status Active</div><div>Payroll Status Active</div><div>Action Hire</div><div>Reason Transfer In Comp Lateral</div><div>Job Indicator Primary Job</div><div>*Benefits System Benefits Administration</div><div>Annual Benefits Base Rate</div><div>USD</div><div>ACA Eligibility Details</div><div>Current</div><div>Benefits Employee Status Active</div></div><div><div>Benefit Program Participation Details</div><div>Effective Date 01/01/2025</div><div>Currency Code USD</div><div>Benefit Program SAL</div><div>Salaried Employee Benefit Pgm</div></div><div><div>Job Data</div><div>Employment Data</div><div>Earnings Distribution</div><div>Benefits Program Participation</div></div><div><div>OK</div><div>Cancel</div><div>Apply</div></div></div>

Step	Action
38.	<p>Complete the <b>Elig Fld 2</b>, <b>Elig Fld 3</b>, <b>Elig Fld 8</b>, and <b>Elig Fld 9</b> fields based on the following:</p> <ul style="list-style-type: none"> <li>• <b>Elig Fld 2</b> - select the applicable Healthcare Group ID (Department value). These values are provided to the health benefit vendors and reflect the group in which the employee is enrolled (DHRM provided 9-digit number)</li> <li>• <b>Elig Fld 3</b> - select "Y" when time is entered by the employee or select "N" when time is entered by a Timekeeper or time is interfaced. Elig Fld 3 should only be completed for PY/TA agencies. Otherwise, Elig Fld 3 should be left blank. Selecting "Y" gives the employee modify access to the timesheet. Selecting "N" or leaving the field blank gives the employee view only access to the timesheet</li> <li>• <b>Elig Fld 8</b> - select the applicable pay frequency (i.e., salaried is "12-24" and hourly is "12-26")</li> <li>• <b>Elig Fld 9</b> - select the applicable value. These values represent the nature of the employee and how the employee health premiums are paid. Select the breakdown of how the benefits payment will be split between the employee (EE) and the employer (ER)</li> </ul> 
	<p>Do not make any updates to the <b>Benefit Program Participation Details</b> section.</p> <p>For further information on Eligibility Configuration Fields, see the <b>Job Aid</b> titled <b>BN361_Overview of the Eligibility of Configuration Fields</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
39.	<p>Click the <b>OK</b> button at the bottom of the page.</p> 
<p>The <b>New Employment Instance</b> page returns.</p> 	



## Human Resources Job Aid

### HR351\_Managing an Inter-Agency Transfer

Step	Action
40.	Continue to the <a href="#">Agency Next Steps After Hire</a> section of this Job Aid.

### Agency Next Steps After Entering the Inter-Agency Transfer

Be sure to enter/review the employee's citizenship, the employee's personal data, and add telework agreement if one has been established/approved.

- For further information on entering citizenship information, updating personal data and telework, see the Job Aids titled **HR351\_Viewing and Modifying Personal Data** and **HR351\_Maintain Employee Teleworker Data**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**

If the Agency requires the Employee Activity Report to be placed in the personnel file, be sure to run the **Employee Activity Report**. This report can be found in the **Cardinal HCM Human Resources Reports Catalog**. The reports catalog can be found on the Cardinal website in **Reports Catalog** under **Resources**.

Communicate with the employee to update/review state and federal withholding forms, direct deposit elections, etc. per established business practices. If the tax withholding paper is not collected and entered prior to the first payroll period, withholdings will default to single and zero. State taxes default to VA.

Receiving Agency Benefits Administrator - Review the transferring employee's information to ensure the transfer is done correctly and with as little disruption to the employee as possible.

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 leave balance for possible adjustments.

- For further information on assigning Work Schedules and entering balance adjustments, see the 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**