

## Completing a New Hire Overview

The Hire employee business process applies to both salary and wage employees. This process is also used when transferring an employee from one Agency to another Agency, however the HR Administrator should follow the Job Aid titled **HR351\_ Completing an Inter-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Before starting the new hire process, validate that the position the employee is being hired into has been created and is as expected including whether the position is eligible for telework. If something needs to be updated on the position, update it prior to hiring the employee. For more information on reviewing and/or updating position data, see the Job Aids titled **HR351\_ Managing Position Data** and **HR351\_ Managing Employee Teleworker Data**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.

Prior to processing the hire, you must also verify that a valid Social Security Number (SSN) is available for the employee as it is required to save the new hire transaction in Cardinal. If the employee does not have a valid SSN, a temporary one can be assigned until a permanent SSN is obtained by the employee. For further information on assigning a temporary SSN, 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**.

A search is required using the **Search Match** page before entering a new hire's personal data in Cardinal. The search is to prevent duplicate entries of the employee and uses the employee's SSN. If there is a match but only the employee's personal data is in Cardinal and not their job data, a new employment instance must be created to generate an employee record to use for the hire. Use the [Hiring a Person When Personal Data Exists in Cardinal](#) section of this Job Aid to process the hire.

**Note:** If a person's personal data already exists in Cardinal, be sure they are not actually a Rehire. If so, see the Job Aid titled **HR351\_ Completing a Rehire**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

**Note:** When entering personal data, there is an **Exclude Contact Information** checkbox option. If this checkbox is checked, the employee will not be included in the Active directory or employee directory extracts (e. g. Undercover Officers).

When an employee has multiple active jobs in multiple Agencies in Cardinal, the personal information is shared as there is only one personal data record. Agencies may update existing personal data, which will impact changes across other Business Units. A scenario that causes issues for the employee is; updates to the email address being changed by one Agency, impacting the employee's access to Cardinal. If the employee has multiple active jobs, please explain this potential impact to the employee so that they can inform their additional employer(s) regarding what job and email address should be primary. This is typically seen when the employee has an hourly job at ABC or VCCS (both interface their HR data from their Agency HR system of record) and obtains a salaried job at another Agency.

**Note:** If the employee has an hourly job and a salaried job, the salaried job and email address will be primary. The secondary employer should be notified not to change the employee's primary business email address.



**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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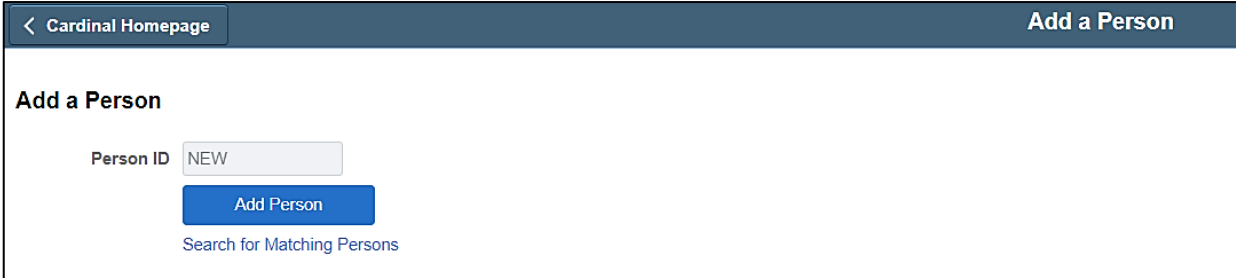
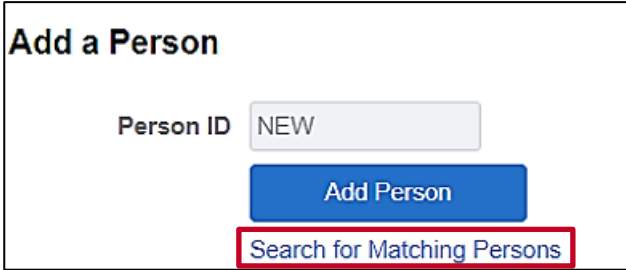


### Revision History

Revision Date	Summary of Changes
4/29/2025	Updated the screenshot of the Benefit Program Participation page ( <a href="#">Section 1</a> , after step 86), updated the screenshot of the Benefits Administration Eligibility section ( <a href="#">Section 1</a> , step 87), 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 2; <a href="#">Section 2</a> , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

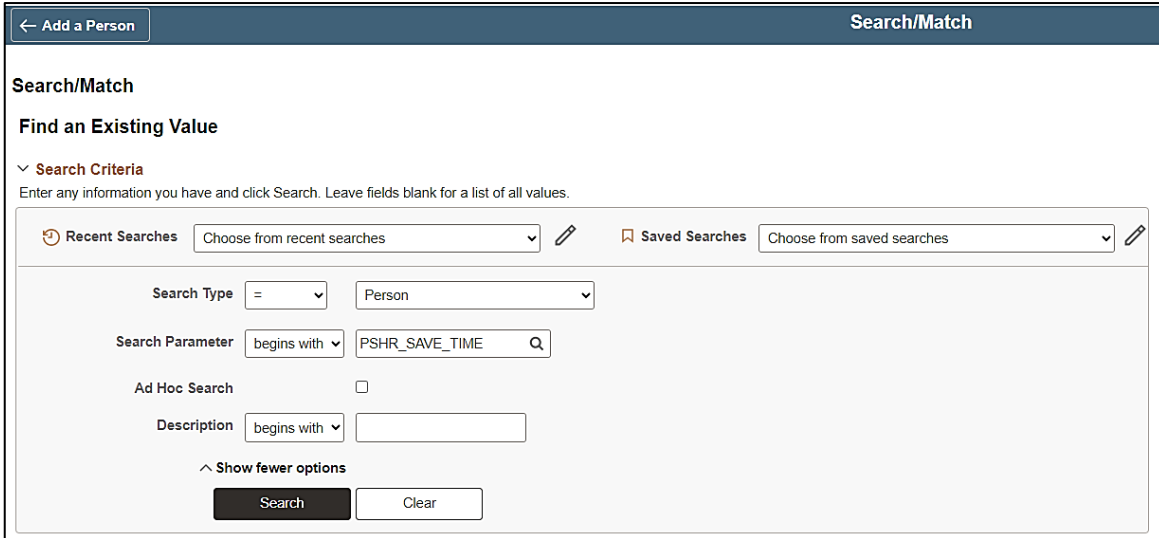
### Completing a New Hire

Before beginning, the applicable employee's SSN must be available for immediate reference. This process begins with a search which is performed to validate that the new employee is not currently in the Cardinal system, or if the employee is already in the system, to obtain the existing Employee ID.

Step	Action
1.	Navigate to the <b>Add a Person</b> page using the following path: <b>NavBar &gt; Menu &gt; Workforce Administration &gt; Personal Information &gt; Add a Person</b>
<p>The <b>Add a Person</b> page displays.</p> 	
2.	Click the <b>Search for Matching Persons</b> link. 

Step	Action
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The **Search/Match Find an Existing Value** page displays.



3.	Click the <b>Clear</b> button.
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Search

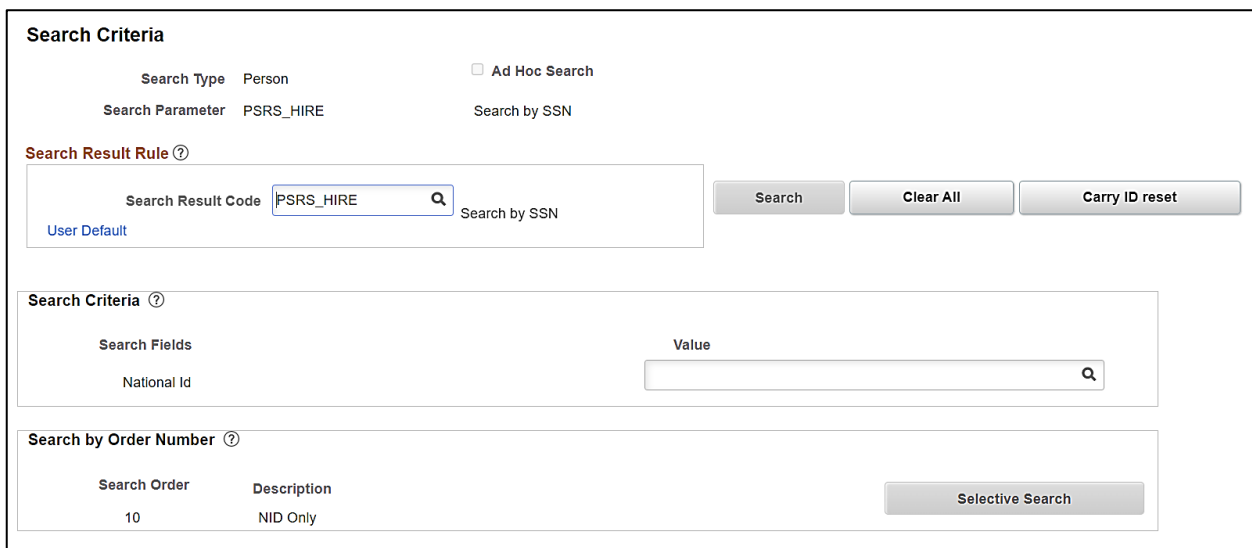
Clear



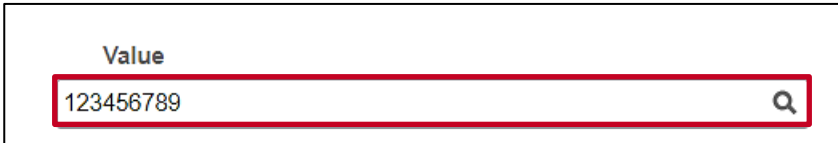

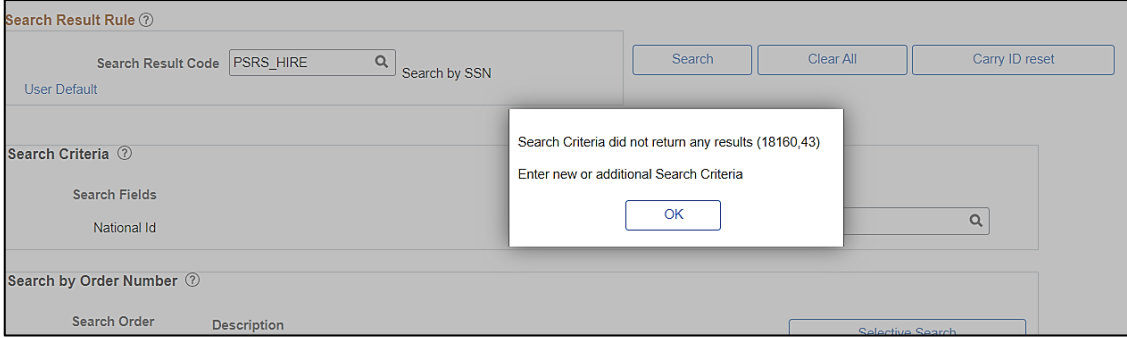

4.	Click the <b>Search</b> button.
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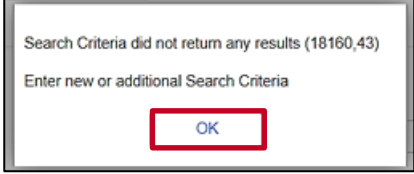
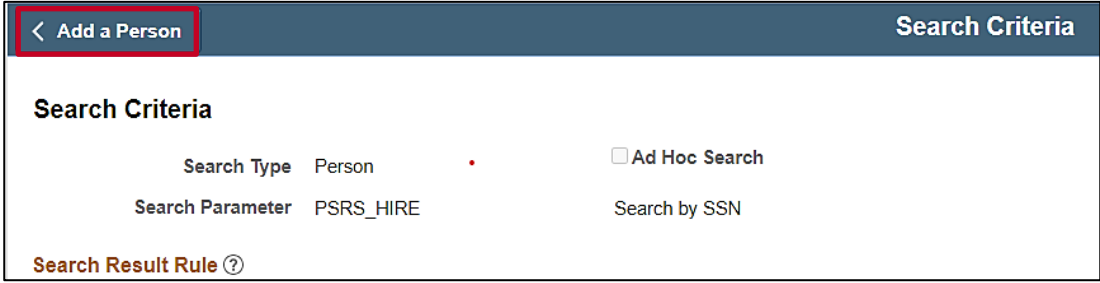

Search

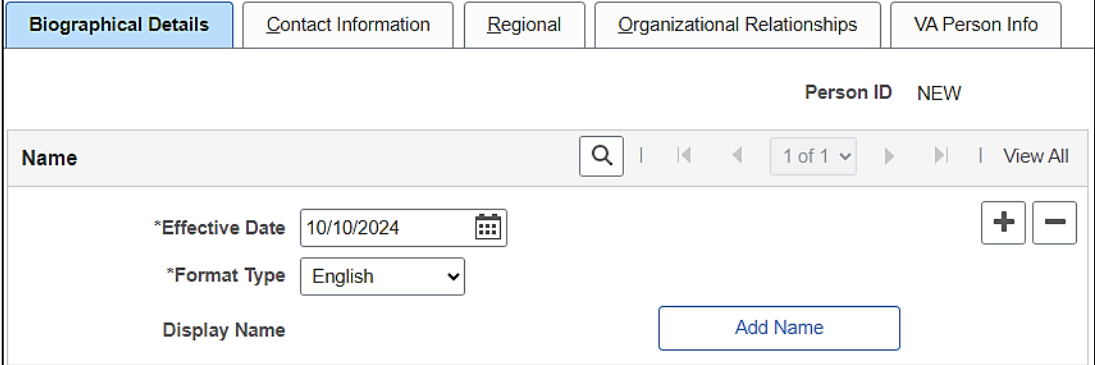
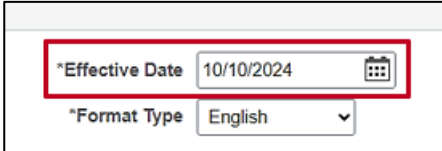


Clear

The **Search Criteria** page displays.

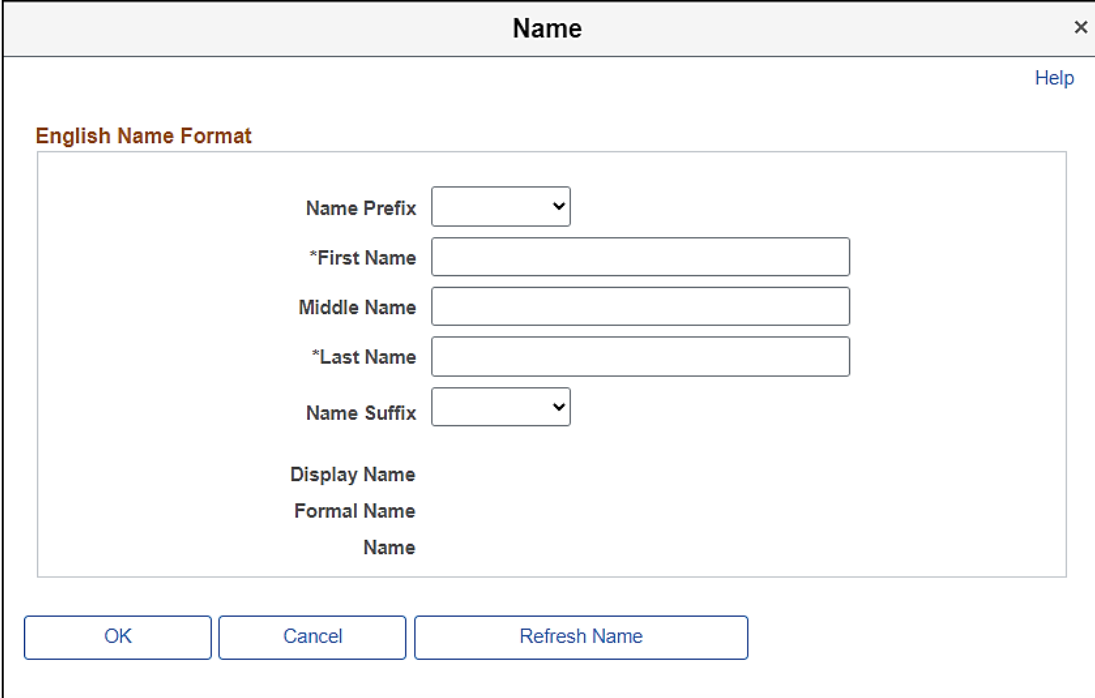












Step	Action
5.	Enter the employee's SSN into the <b>Value</b> field within the <b>Search Criteria</b> section. 
6.	Press the <b>Tab</b> key on the keyboard to enable the <b>Search</b> button to the right of the <b>Search Result Rule</b> section.
	The SSN is reformatted automatically (i.e., dashes are removed if they were entered). 
7.	Click the <b>Search</b> button. 
The Search Criteria results message displays in a pop-up window.	
	
	<p>The above message displays when the employee's SSN is not in the Cardinal system. In these cases, proceed to step 8.</p> <p>If the system displays an Employee ID, the employee already exists in the Cardinal system. A bit of research, using the <b>Person Organizational Summary</b> page, is needed to determine how to proceed. If the person has never worked at the Commonwealth of Virginia, refer to the <a href="#">Hiring a Person When Personal Data Exists in Cardinal</a> section of this Job Aid. If the person has employment history, either a transfer or rehire should be completed as applicable. For further information on transferring existing employees, refer to the Job Aid titled <b>HR351_Completing an Inter-Agency Transfer</b>. For further information on rehiring employees, refer to the Job Aid titled <b>HR351_Completing a Rehire</b>. These Job Aids can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>




Step	Action
8.	<p>Click the <b>OK</b> button to close the Search Criteria message.</p> 
9.	<p>The <b>Search Criteria</b> page returns. Click the <b>Add a Person</b> tab in the top left corner of the page.</p> 
10.	<p>The <b>Add a Person</b> page returns. Click the <b>Add Person</b> button.</p> 

Step	Action
	<p>The <b>Modify a Person</b> page displays with the <b>Biographical Details</b> tab displayed by default.</p> 
11.	<p>The <b>Effective Date</b> field defaults to the current date. Update this date to the applicable date of the new hire as needed.</p> 
	<p>The <b>Effective Date</b> cannot be greater than today's date when adding/modifying a person in Cardinal. 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>
12.	<p>Click the <b>Add Name</b> button.</p> 



Step	Action
	<p>The <b>Name</b> page displays in a pop-up window.</p> 
13.	<p>Optionally, click the <b>Name Prefix</b> dropdown button and select the applicable prefix.</p> 
14.	<p>Enter the employee's first name in the <b>First Name</b> field (required).</p> 
15.	<p>Optionally, enter the employee's middle name in the <b>Middle Name</b> field.</p>
	<p>Do not add a period behind the middle initial.</p>
16.	<p>Enter the employee's last name in the <b>Last Name</b> field (required).</p> 
	<p>Do not include suffixes (Jr, Sr, or IV) in the <b>Last Name</b> field.</p>

Step	Action
17.	As needed, click the <b>Name Suffix</b> dropdown button and select the applicable suffix. <div data-bbox="256 378 669 441" style="border: 1px solid black; padding: 5px; margin-top: 10px;">             Name Suffix <span style="border: 1px solid red; padding: 2px;">▼</span> </div>
18.	Click the <b>OK</b> button. <div data-bbox="256 529 1172 613" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <span style="border: 1px solid red; padding: 2px 10px;">OK</span> <span style="padding: 2px 10px;">Cancel</span> <span style="padding: 2px 10px;">Refresh Name</span> </div>
<p>The <b>Modify a Person</b> page returns. Scroll down to the <b>Biographic Information</b> section.</p> <div data-bbox="243 699 1356 966" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><b>Biographic Information</b></p> <p>Date of Birth <input type="text"/>  Years 0 Months 0</p> <p>Birth Country <input type="text" value="USA"/>  United States</p> <p>Birth State <input type="text"/> </p> <p>Birth Location <input type="text"/> <input type="checkbox"/> Exclude Contact Information?</p> </div>	
19.	<p>Enter/select the employee's date of birth (required) in the <b>Date of Birth</b> field.</p> <p>The <b>Birth Country</b> field defaults to "USA". This can be updated but is not required as this data is not reported.</p> <div data-bbox="256 1136 766 1276" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p><b>Biographic Information</b></p> <div style="border: 1px solid red; padding: 2px;"> <p>Date of Birth <input type="text"/> </p> <p>Birth Country <input type="text" value="USA"/> </p> </div> </div>
20.	<p>Click the <b>Exclude Contact Information</b> checkbox option if the employee's personal information should not be sent to VITA in the Active Directory Extract or COV Employee Directory Extract (e. g. Undercover Officers).</p> <div data-bbox="256 1434 597 1528" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> Exclude Contact Information?         </div>
21.	<p>Scroll down to the <b>Biographical History</b> section.</p>

Step	Action
	<p>The <b>Biographical History</b> section displays.</p> <div data-bbox="256 380 1346 821" style="border: 1px solid gray; padding: 5px;"> <p>Biographical History <span style="float: right;">1 of 1   View All</span></p> <p>*Effective Date <input type="text" value="10/11/2024"/> <input style="float: right; margin-right: 10px;" type="button" value="📅"/> <input type="button" value="+"/> <input type="button" value="-"/></p> <p>*Gender <input type="text" value="Unknown"/> <input type="button" value="▼"/></p> <p>*Highest Education Level <input type="text" value="Not Indicated"/> <input type="button" value="▼"/></p> <p>*Marital Status <input type="text" value="Unknown"/> <input type="button" value="▼"/> As of <input type="text"/> <input type="button" value="📅"/></p> <p>Language Code <input type="text"/> <input type="button" value="▼"/></p> <p>Alternate ID <input type="text"/></p> <p><input type="checkbox"/> Full-Time Student</p> </div>
	<p>The <b>Effective Date</b> field within this section defaults to the effective date selected above. Do not change.</p>
22.	<p>Click the <b>Gender</b> dropdown button and select the employee’s gender. This field is a required field for benefits and payroll purposes and must provide the employee’s legal gender. This is not to be confused with the optional <b>Preferred Gender</b> field located on the <b>VA Person Info</b> tab.</p> <div data-bbox="256 1121 646 1184" style="border: 1px solid gray; padding: 2px;"> <p>*Gender <input type="text" value="Unknown"/> <input type="button" value="▼"/></p> </div>
	<p>The <b>Gender</b> field defaults to “Unknown”. If it is not updated prior to payroll processing, the employee’s payroll will error out. Please update the <b>Gender</b> field as soon as the information is obtained.</p>
23.	<p>Click the <b>Highest Education Level</b> dropdown button and select the employee’s highest level of education.</p> <div data-bbox="256 1440 1008 1507" style="border: 1px solid gray; padding: 2px;"> <p>*Highest Education Level <input type="text" value="Not Indicated"/> <input type="button" value="▼"/></p> </div>
24.	<p>Click the <b>Marital Status</b> dropdown button and select the employee’s legal marital status.</p> <div data-bbox="256 1591 885 1661" style="border: 1px solid gray; padding: 2px;"> <p>*Marital Status <input type="text" value="Unknown"/> <input type="button" value="▼"/></p> </div>
	<p>The <b>Language Code</b>, <b>Alternate ID</b>, and <b>Full-Time Student</b> fields are not currently tracked or used in Cardinal.</p>
25.	<p>Scroll down to the <b>National ID</b> section.</p>

Step	Action
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The **National ID** section displays.

**National ID**

1-1 of 1 | View All

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number		<input checked="" type="checkbox"/>

26. Enter the employee's Social Security Number (SSN) in the **National ID** field.

**National ID**

1-1 of 1 | View All

*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number		<input checked="" type="checkbox"/>

27. Scroll back up to the top of the page and click the **Contact Information** tab.

Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

John Doe Person ID NEW

Name

\*Effective Date 10/11/2024

\*Format Type English

Display Name John Doe [Edit Name](#)

**Biographic Information**

Date of Birth 10/11/1990 Years 34 Months 0

Birth Country USA United States

Birth State

Birth Location   Exclude Contact Information?

The **Contact Information** tab displays.


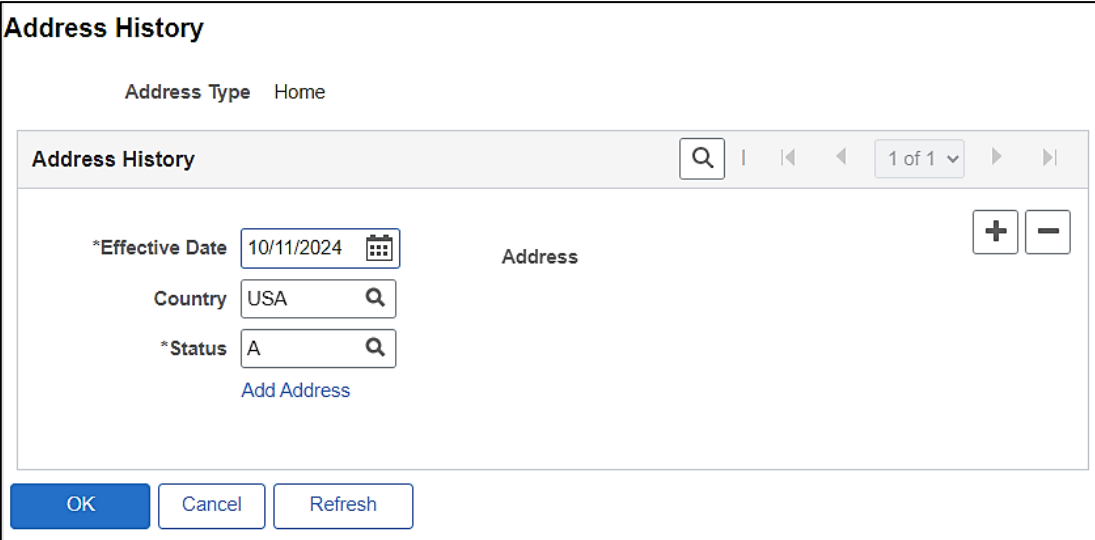

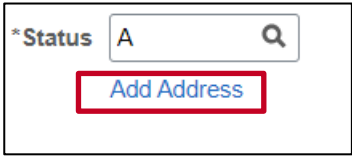

Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info


John Doe Empl ID NEW

**Current Addresses**

1-1 of 1 | View All

Address Type	As Of Date	Status	Address
Home	10/11/2024	A	<a href="#">Add Address Detail</a>

Step	Action
28.	Click the <b>Add Address Detail</b> link. <div data-bbox="256 380 613 474" style="border: 1px solid red; padding: 5px; margin: 10px 0;">  </div>
	The <b>Address History</b> page displays. <div data-bbox="256 562 1344 1098" style="border: 1px solid black; padding: 10px; margin: 10px 0;">  </div>
	The <b>Effective Date</b> field within this section defaults to the date previously selected. Do not change.
29.	Click the <b>Add Address</b> link. <div data-bbox="256 1297 605 1451" style="border: 1px solid black; padding: 5px; margin: 10px 0;">  </div>
	An <b>Address Type</b> of “Home” is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information.

Step	Action
	<p>The <b>Edit Address</b> page displays.</p> <div data-bbox="256 380 1349 1003" style="border: 1px solid black; padding: 10px;"> <p><b>Edit Address</b></p> <p>Country United States</p> <p>Address 1 <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>Address 3 <input type="text"/></p> <p>City <input type="text"/> State <input type="text" value="Q"/></p> <p>Postal <input type="text"/></p> <p>County <input type="text"/></p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>
30.	Enter the employee's address information using the applicable fields.
	The <b>Address 1</b> , <b>City</b> , <b>State</b> , and <b>Postal</b> are required fields. The employee's personal data cannot be saved if any of these fields are blank.
31.	Click the <b>OK</b> button. <div data-bbox="256 1276 727 1381" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p><input style="border: 2px solid red;" type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>

Step	Action
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The **Address History** page returns with the address information displayed.

**Address History**

Address Type Home

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**Address History** Q | << < 1 of 1 > >>

\*Effective Date

Country

\*Status

[Add Address](#)

Address 123 Main Street  
Richmond, VA 12345

32.	Click the <b>OK</b> button.
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The **Contact Information** tab redispays.

Biographical Details
Contact Information
Regional
Organizational Relationships
VA Person Info

John Doe Empl ID NEW

**Current Addresses**

<< < 1-1 of 1 > >>

Address Type	As Of Date	Status	Address	
Home	10/11/2024	A	123 Main Street Richmond, VA 12345	<a href="#">Edit/View Address Detail</a> <input type="button" value="+"/> <input type="button" value="-"/>


**Phone Information**

<< < 1-1 of 1 > >>


*Phone Type	Telephone	Extension	Preferred
<input type="button" value="☰"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/>

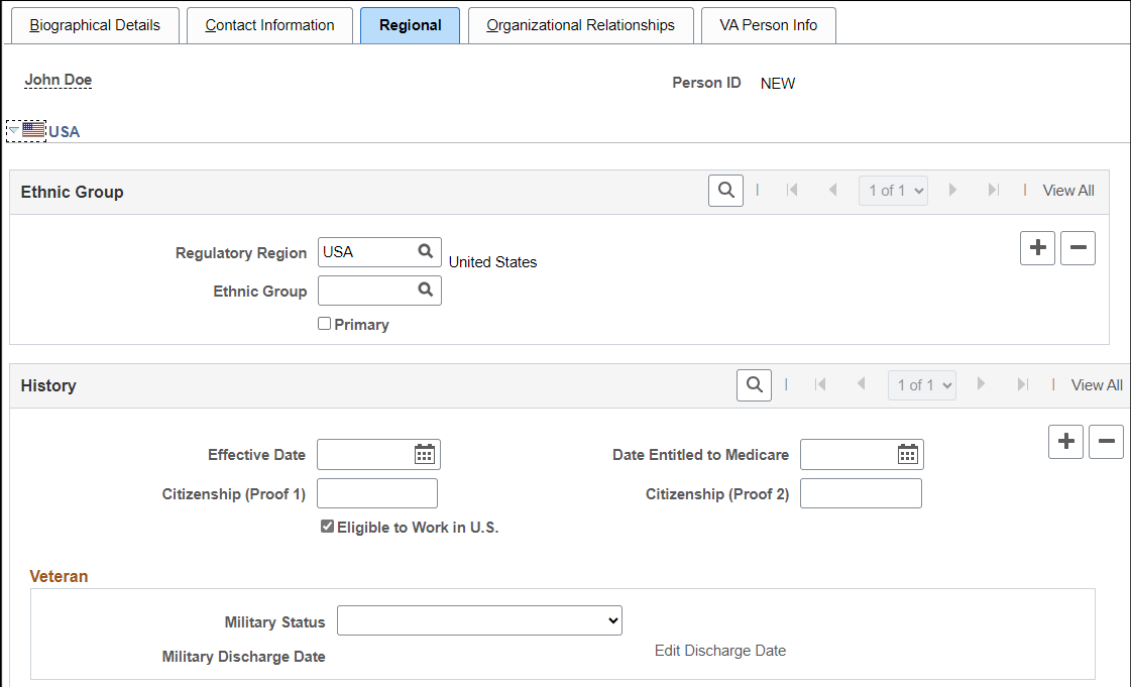
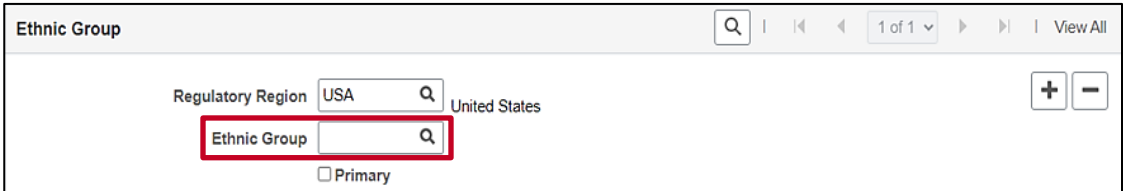


33.	Click the <b>Phone Type</b> dropdown button and select the type of phone.
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*Phone Type	Telephone	Extension	Preferred
<div style="border: 2px solid red; padding: 2px;">☰</div>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/> <input type="button" value="+"/> <input type="button" value="-"/>

Step	Action																																				
34.	<p>Enter the applicable telephone number in the <b>Telephone</b> field.</p> <table border="1"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Mobile</td> <td style="border: 2px solid red;"></td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Phone Type	Telephone	Extension	Preferred			Mobile			<input type="checkbox"/>	+	-																								
*Phone Type	Telephone	Extension	Preferred																																		
Mobile			<input type="checkbox"/>	+	-																																
	<p>It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.</p>																																				
35.	<p>Click the <b>Preferred</b> checkbox option to identify the employee's preferred phone number.</p> <table border="1"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Mobile</td> <td>888/888-8888</td> <td></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Phone Type	Telephone	Extension	Preferred			Mobile	888/888-8888		<input checked="" type="checkbox"/>	+	-																								
*Phone Type	Telephone	Extension	Preferred																																		
Mobile	888/888-8888		<input checked="" type="checkbox"/>	+	-																																
36.	<p>Add additional phone numbers for the employee as needed by clicking the <b>Add a New Row</b> icon (+) and then repeating steps 33 - 35.</p>																																				
37.	<p>Scroll down to the <b>Email Option Selection</b> and <b>Email Addresses</b> sections.</p>																																				
<p>The <b>Email Option Selection</b> and <b>Email Addresses</b> sections display.</p> <table border="1"> <thead> <tr> <th colspan="6">Email Option Selection</th> </tr> </thead> <tbody> <tr> <td colspan="6"> <input checked="" type="radio"/> Agency Provided Email              <input type="radio"/> Pending Agency Provided Email              <input type="radio"/> Employee Provided Email         </td> </tr> <tr> <td colspan="6">           1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, <b>except</b>:            2. When no email address is available, select applicable email option and <b>ALWAYS</b> use noemail@virginia.gov         </td> </tr> <tr> <th colspan="6">Email Addresses</th> </tr> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> <th></th> </tr> <tr> <td></td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> <td></td> </tr> </tbody> </table>		Email Option Selection						<input checked="" type="radio"/> Agency Provided Email <input type="radio"/> Pending Agency Provided Email <input type="radio"/> Employee Provided Email						1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, <b>except</b> : 2. When no email address is available, select applicable email option and <b>ALWAYS</b> use noemail@virginia.gov						Email Addresses						*Email Type	*Email Address	Preferred						<input type="checkbox"/>	+	-	
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<input checked="" type="radio"/> Agency Provided Email <input type="radio"/> Pending Agency Provided Email <input type="radio"/> Employee Provided Email																																					
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Email Addresses																																					
*Email Type	*Email Address	Preferred																																			
		<input type="checkbox"/>	+	-																																	



Step	Action
38.	<p>Complete these sections based on the following guidelines:</p> <ul style="list-style-type: none"> <li>a. If the employee has been issued a business email:               <ul style="list-style-type: none"> <li>i. Accept the default email option of <b>Agency Provided Email</b></li> <li>ii. Click the <b>Email Type</b> dropdown button and select “Business”</li> <li>iii. Enter the email address in the <b>Email Address</b> field</li> <li>iv. Select the <b>Preferred</b> checkbox option</li> <li>v. Notify the employee of their email address and provide information to register for Cardinal Employee Self Service using this email.</li> </ul> </li> <li>b. If the employee’s business email has been requested, but not yet assigned or the employee chooses not to provide a personal email:               <ul style="list-style-type: none"> <li>i. Click the <b>Pending Agency Provided Email</b> option</li> <li>ii. Click <b>Email Type</b> dropdown button and select “Business”</li> <li>iii. Enter “noemail@virginia.gov” in the <b>Email Address</b> field</li> <li>iv. Select the Preferred checkbox option</li> </ul> </li> <li>c. If a business email will not be provided to the employee:               <ul style="list-style-type: none"> <li>i. Click the <b>Employee Provided Email</b> option</li> <li>ii. Click the <b>Email Type</b> dropdown button and select “Personal”</li> <li>iii. Enter the email address in the <b>Email Address</b> field</li> <li>iv. Select the <b>Preferred</b> checkbox option</li> </ul> </li> </ul>
	<p>Once the employee’s business email is obtained, replace this email address with their new email address. The email entered must be provided to the employee as they will need it to register and access Cardinal Employee Self-Services (ESS). If this is not updated, the employee will not be able to register for access to Cardinal ESS.</p>
39.	<p>Scroll back up to the top of the page and click the <b>Regional</b> tab.</p> <div style="border: 1px solid black; padding: 5px; display: flex; justify-content: space-around; margin-top: 10px;"> <span>Biographical Details</span> <span>Contact Information</span> <span style="border: 2px solid red;">Regional</span> <span>Organizational Relationships</span> <span>VA Person Info</span> </div>

Step	Action
	<p>The <b>Regional</b> tab displays.</p> 
40.	<p>The fields within the <b>Ethnic Group</b> are both optional. The <b>Regulatory Region</b> field defaults to “USA”. Do not change.</p>
41.	<p>Click the <b>Ethnic Group Look Up</b> icon and select the employee’s ethnic group.</p> 
	<p>If the employee identifies with multiple ethnic groups, click the <b>Add a New Row</b> icon (+) and repeat this step.</p>
42.	<p>If the employee provided their military status and service documentation, scroll down as needed, click the <b>Military Status</b> dropdown button, and select the applicable value.</p> 

Step	Action
43.	<p>The remaining sections on this tab are not currently being utilized in Cardinal. Click the <b>VA Person Info</b> tab.</p> <p>The <b>Organizational Relationships</b> tab will be addressed after reviewing/completing the <b>VA Person Info</b> tab.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <span>Biographical Details</span>   <span>Contact Information</span>   <span>Regional</span>   <span>Organizational Relationships</span>   <span style="border: 2px solid red;">VA Person Info</span> </div>

The **VA Person Info** tab displays.

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info

John Doe Person ID NEW

Power Of Attorney  Linked Participant EmplID

Preferred Pronoun  Preferred Gender

Save
Notify
Refresh

Add
Update/Display
Include History

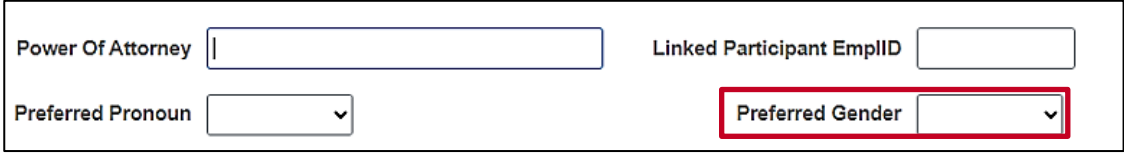
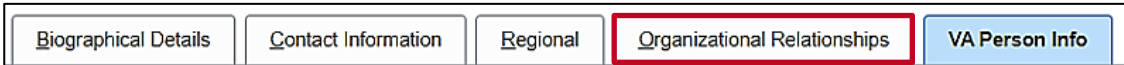
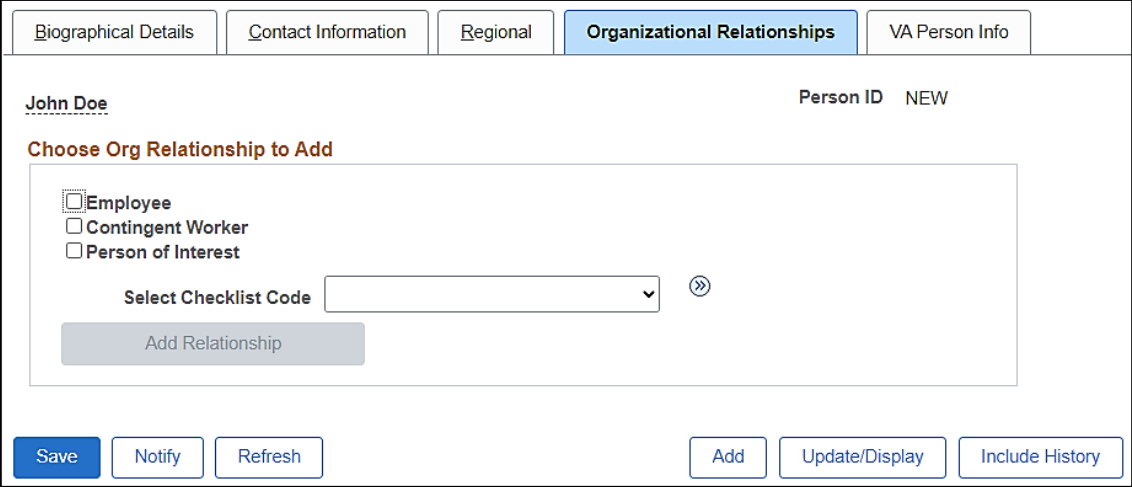

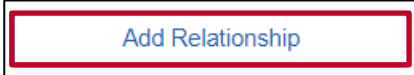
44.	<p>Enter the name of the person who has legal Power of Attorney for the employee in the <b>Power of Attorney</b> field.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <span>Power Of Attorney</span> <span style="border: 2px solid red; display: inline-block; width: 150px; height: 20px; vertical-align: middle;"></span> </div>
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The Power of Attorney is very useful in the unfortunate event of a death in service. This person needs to be contacted for decisions regarding payout of leave and/or death certificate request.

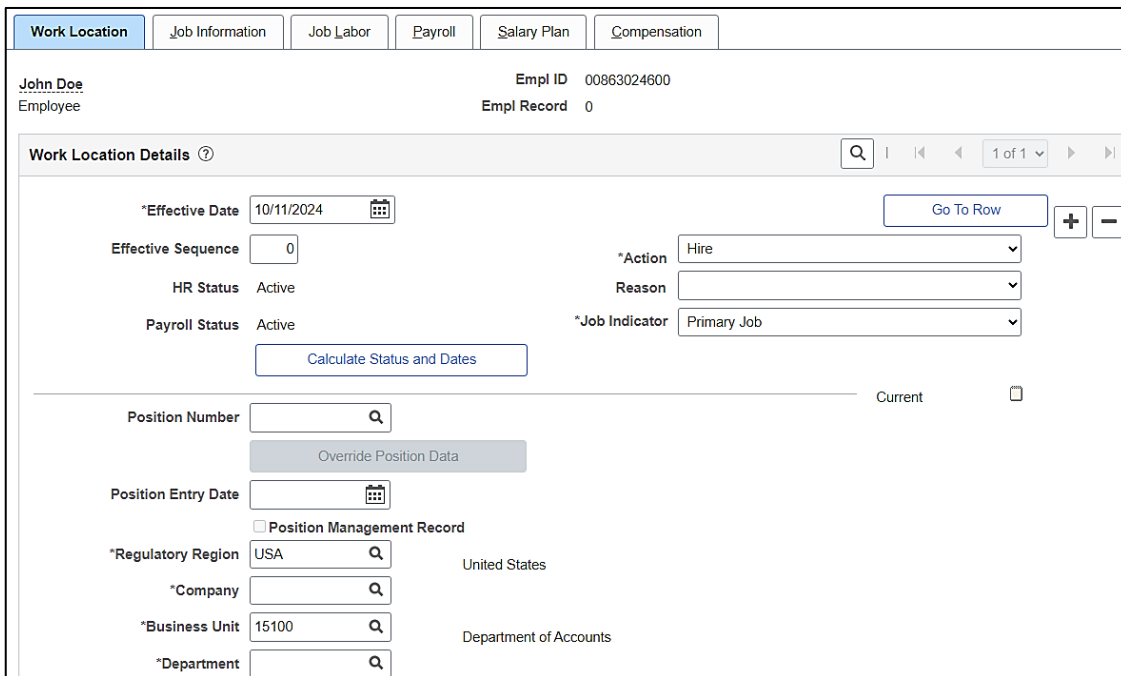
45.	<p>If the employee is linked to another employee of the Commonwealth of Virginia, enter that employee ID in the <b>Linked Participant EmplID</b> field.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <span>Power Of Attorney <input type="text"/></span> <span style="margin-left: 20px;"><span style="border: 2px solid red; display: inline-block; width: 100px; height: 20px; vertical-align: middle;"></span> <b>Linked Participant EmplID</b> <input type="text"/></span> </div> <p>Preferred Pronoun <input type="text"/> <span style="margin-left: 100px;">Preferred Gender <input type="text"/></span></p>
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46.	<p>Click the <b>Preferred Pronoun</b> dropdown button and select the preferred pronoun provided by the employee.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <span>Power Of Attorney <input type="text"/></span> <span style="margin-left: 20px;">Linked Participant EmplID <input type="text"/></span> </div> <div style="border: 1px solid black; padding: 5px; margin-top: 5px;"> <span style="border: 2px solid red; display: inline-block; width: 100px; height: 20px; vertical-align: middle;"></span> <b>Preferred Pronoun</b> <input type="text"/> <span style="margin-left: 100px;">Preferred Gender <input type="text"/></span> </div>
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Step	Action
47.	<p>Click the <b>Preferred Gender</b> dropdown button and select the preferred gender provided by the employee.</p> 
48.	<p>Click the <b>Organizational Relationships</b> tab.</p> 
<p>The <b>Organizational Relationships</b> tab displays.</p> 	
49.	<p>Click the <b>Employee</b> checkbox option.</p> <p>The <b>Hire</b> checklist appears in the <b>Select Checklist Code</b> field after selecting the <b>Employee</b> checkbox option.</p> 
50.	<p>Click the <b>Add Relationship</b> button.</p> 

Step	Action
	<p>This is the step where information entered for the employee’s personal data is validated. If there is any missing required information, Cardinal will alert you at this point.</p> <div style="border: 2px solid red; padding: 5px;"> <p>Do not click the <b>Back</b> button in your browser to go back as this will cause you to lose the information that has been entered.</p> </div> <p>Review the message and go to the tab where the missing information is captured and enter it before coming back to the <b>Organizational Relationships</b> tab and clicking the <b>Add Relationship</b> button again.</p>


The new employee’s **Job Record** page displays with the **Work Location** tab displayed by default.



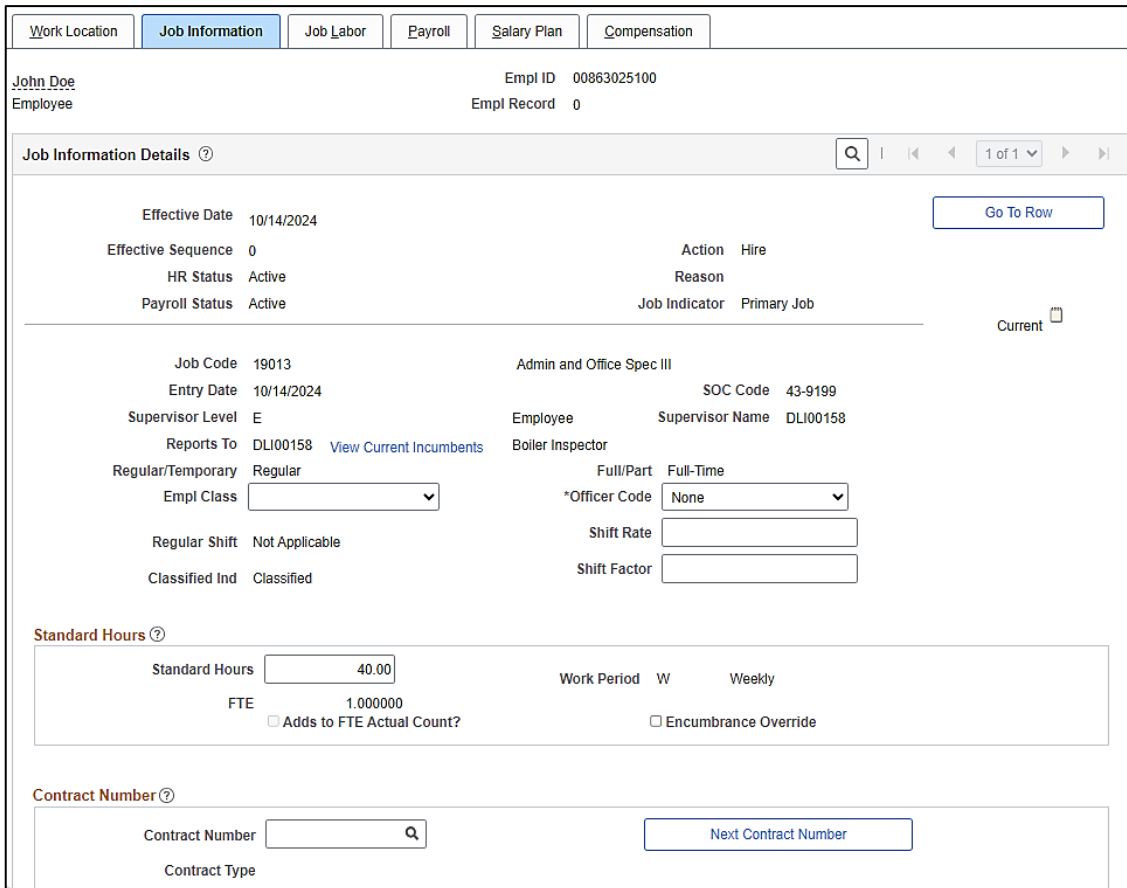
	<p>Cardinal will auto-assign the Employee ID Number. It is located at the top of the <b>Work Location</b> tab. Take note of the assigned Employee ID Number.</p> <div style="border: 1px solid gray; padding: 5px;">  </div>
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Step	Action
51.	<p>The <b>Effective Date</b> field defaults to the date entered on the <b>Personal Information</b> page. If this date is not the first date of employment for the employee, you can update it now.</p> <div data-bbox="256 411 794 569" style="border: 1px solid #ccc; padding: 5px;"> <p>Work Location Details <span style="font-size: small;">?</span></p> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;"> <span style="font-size: small;">*Effective Date</span> <input type="text" value="10/11/2024"/> <span style="font-size: small;">📅</span> </div> <span style="font-size: small;">Effective Sequence</span> <input type="text" value="0"/> </div>
	<p>A help desk ticket is required to adjust the new employee's effective date after their Job Record is saved.</p>
52.	<p>The <b>Action</b> field defaults to "Hire" and no other selections are available.</p> <div data-bbox="256 768 911 936" style="border: 1px solid #ccc; padding: 5px;"> <span style="font-size: small;">*Action</span> <input type="text" value="Hire"/> <span style="font-size: small;">▼</span>  <span style="font-size: small;">Reason</span> <input type="text"/> <span style="font-size: small;">▼</span>  <span style="font-size: small;">*Job Indicator</span> <input type="text" value="Primary Job"/> <span style="font-size: small;">▼</span> </div>
53.	<p>Click the <b>Reason</b> dropdown button and select "New Hire".</p> <div data-bbox="256 1024 911 1192" style="border: 1px solid #ccc; padding: 5px;"> <span style="font-size: small;">*Action</span> <input type="text" value="Hire"/> <span style="font-size: small;">▼</span>  <span style="font-size: small;">Reason</span> <input type="text"/> <span style="font-size: small;">▼</span>  <span style="font-size: small;">*Job Indicator</span> <input type="text" value="Primary Job"/> <span style="font-size: small;">▼</span> </div>
	<p>If processing an Inter-Agency Transfer for the employee, use the applicable Transfer In (XXX) <b>Reason</b> code. For further information on inter-agency transfers, see the Job Aid titled <b>HR351_ Managing an Inter-Agency Transfer</b>. This Job Aid is located on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
54.	<p>Enter the employee's Position Number in the <b>Position Number</b> field and then tab out of the field.</p> <div data-bbox="256 1482 956 1619" style="border: 1px solid #ccc; padding: 5px;"> <span style="font-size: small;">Position Number</span> <input type="text"/> <span style="font-size: small;">🔍</span>  <div style="background-color: #f0f0f0; padding: 2px; margin-top: 5px; text-align: center; font-size: small;">Override Position Data</div> </div>
	<p>The remaining position related fields on this page will auto-populate once the Position Number is entered and tab out of the <b>Position Number</b> field.</p>



Step	Action
55.	Click the <b>Job Information</b> tab. 

The **Job Information** tab displays.



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

John Doe Employee | Empl ID 00863025100 | Empl Record 0

**Job Information Details** (1 of 1)


Effective Date: 10/14/2024  
 Effective Sequence: 0  
 HR Status: Active  
 Payroll Status: Active



Action: Hire  
 Reason:  
 Job Indicator: Primary Job

Job Code: 19013 (Admin and Office Spec III)  
 Entry Date: 10/14/2024  
 Supervisor Level: E  
 Reports To: DLI00158 (Boiler Inspector)  
 Regular/Temporary: Regular  
 Empl Class:   
 Regular Shift: Not Applicable  
 Classified Ind: Classified

Standard Hours: 40.00  
 FTE: 1.000000  
 Work Period: W Weekly  
 Adds to FTE Actual Count?  Encumbrance Override

Contract Number:   
 Contract Type:

56.	Review the information within the <b>Job Information Details</b> section. These values are populated when the Position Number is selected on the <b>Work Location</b> tab.
57.	Click the <b>Empl Class</b> dropdown button and select the applicable Employee Class. This is a required field. 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> . 

Step	Action
	The <b>Action/Reason, Employee Class, and Job Code</b> fields 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.
58.	<p>The <b>Standard Hours</b> field defaults to “40”. If the position is Part Time or Quasi, update the <b>Standard Hours</b> field to reflect the number of hours the employee will be working (e.g., 34, 35, 36, etc.) and tab out of the field.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <span>Standard Hours</span> <input style="border: 2px solid red; width: 100px;" type="text" value="40.00"/> </div>
	The <b>FTE</b> field will calculate after tabbing out of the <b>Standard Hours</b> field. The <b>Full/Part</b> field defaults based on the information entered for the position.
59.	<p>The <b>Job Labor</b> tab is not utilized in Cardinal. Click the <b>Payroll</b> tab.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <span>Work Location</span> <span>Job Information</span> <span>Job Labor</span> <span style="border: 2px solid red; padding: 2px;">Payroll</span> <span>Salary Plan</span> <span>Compensation</span> </div>

The **Payroll** tab displays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

John Doe Empl ID 00863024700  
Employee Empl Record 0

Payroll Information ⓘ
1 of 1

Effective Date	10/14/2024				<a href="#">Go To Row</a>
Effective Sequence	0	Action	Hire		
HR Status	Active	Reason	New Hire		
Payroll Status	Active	Job Indicator	Primary Job		Future ⓘ

\*Payroll System Payroll for North America

Absence System Other


Payroll for North America ⓘ

Pay Group	<input style="width: 80%;" type="text"/>	Holiday Schedule	<input style="width: 80%;" type="text"/>
Employee Type	<input style="width: 80%;" type="text"/>	FICA Status	<span style="border: 1px solid #ccc; padding: 2px;">Subject</span>
Tax Location Code	<input style="width: 80%;" type="text"/>		<a href="#">Edit ChartFields</a>
GL Pay Type	<input style="width: 80%;" type="text"/>		
Combination Code	<input style="width: 100%;" type="text"/>		

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

OK
Cancel
Apply



Step	Action
	The <b>Payroll System</b> field defaults to “Payroll for North America”. Do not change.
60.	<p>The <b>Absence System</b> field defaults to “Other”. If your Agency uses Cardinal Absence Management and the employee is salaried, click the <b>Absence System</b> dropdown button and select “Absence Management”. If your Agency uses any Absence Management system other than Cardinal Absence Management or if the employee’s Employee Class is “Wage”, keep the selection of “Other”.</p> <div style="display: flex; justify-content: space-around;"> <div data-bbox="256 625 782 743"> <p>*Payroll System <input type="text" value="Payroll for North America"/></p> <p>Absence System <input type="text" value="Other"/></p> </div> <div data-bbox="782 625 1328 743"> <p>*Payroll System <input type="text" value="Payroll for North America"/></p> <p>Absence System <input type="text" value="Absence Management"/></p> </div> </div>
61.	<p>Click the <b>Pay Group Look Up</b> icon within the <b>Payroll for North America</b> section and select the applicable <b>Pay Group</b> for the employee.</p> <div data-bbox="256 863 802 1010"> <p>Payroll for North America ?</p> <p>Pay Group <input type="text" value=""/></p> <p>Employee Type <input type="text" value=""/></p> </div>

The page refreshes once the **Pay Group** is selected.

HR Status	Active	Reason	
Payroll Status	Active	Job Indicator	Primary Job
Current			

*Payroll System	<input type="text" value="Payroll for North America"/>
Absence System	<input type="text" value="Absence Management"/>

**Payroll for North America ?**

Pay Group	<input type="text" value="SM1"/>	Semimonthly Class (SATFRI07)	
Employee Type	<input type="text" value="S"/>	Salaried	Holiday Schedule <input type="text" value="HOLSAL"/> Sal.HolSch
Tax Location Code	<input type="text" value=""/>		
GL Pay Type	<input type="text" value=""/>	FICA Status	<input type="text" value="Subject"/>
Combination Code	<input type="text" value=""/>	<a href="#">Edit ChartFields</a>	


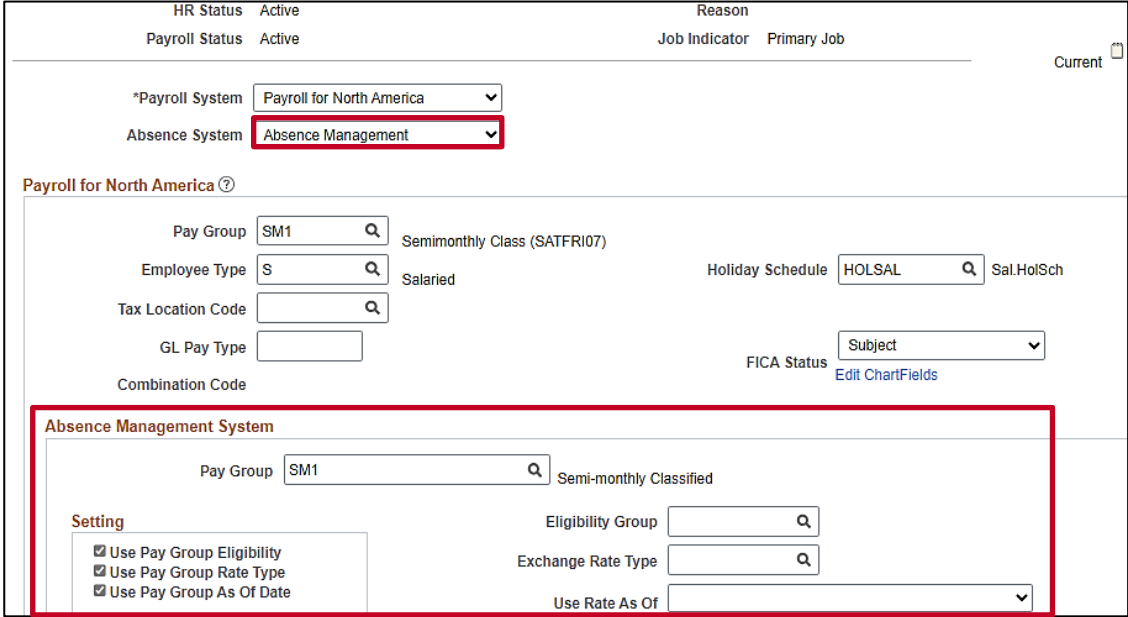

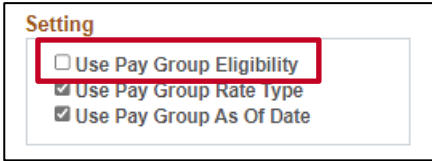
  




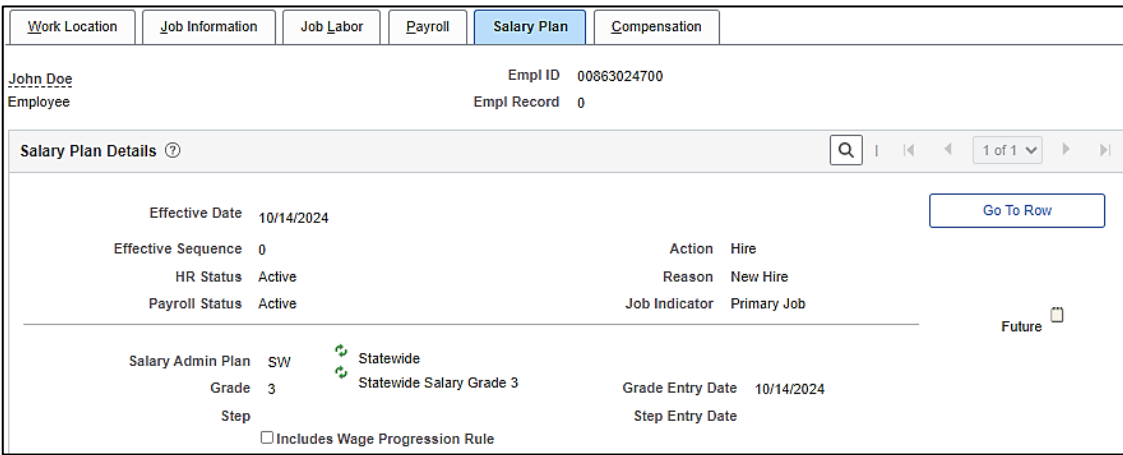


**Absence Management System**

Pay Group	<input type="text" value="SM1"/>	Semi-monthly Classified
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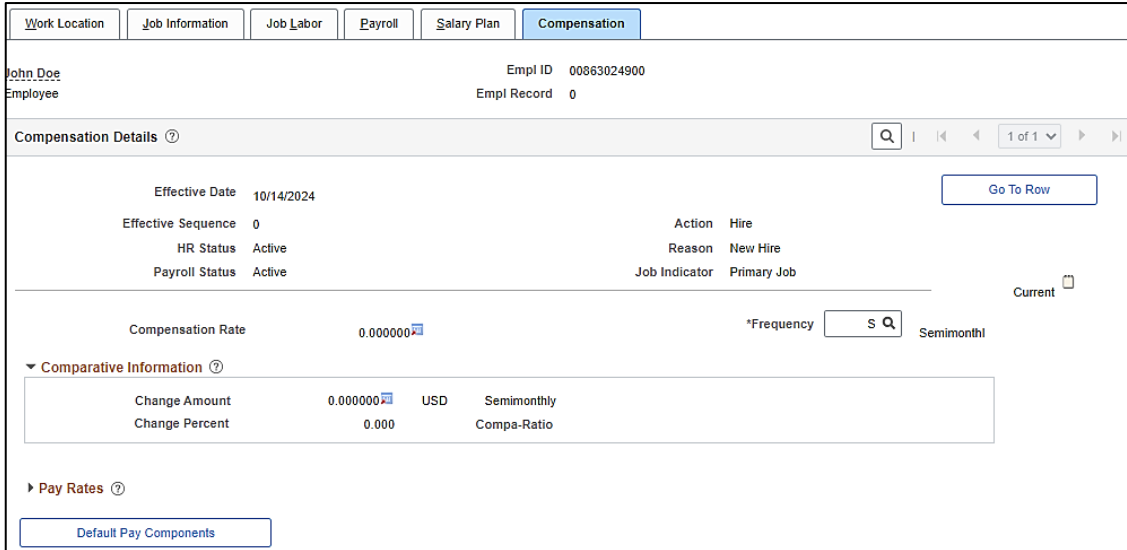
<b>Setting</b>	Eligibility Group <input type="text" value=""/>
<input checked="" type="checkbox"/> Use Pay Group Eligibility	Exchange Rate Type <input type="text" value=""/>
<input checked="" type="checkbox"/> Use Pay Group Rate Type	Use Rate As Of <input type="text" value=""/>
<input checked="" type="checkbox"/> Use Pay Group As Of Date	

Step	Action
62.	<p>The <b>FICA Status</b> field defaults to “Subject” for regular Social Security and Medicare tax withholdings. Update as needed based upon the following guidance:</p> <ul style="list-style-type: none"> <li>• “Exempt” if the employee is exempt from both Social Security and Medicare tax withholdings</li> <li>• “Medicare only” if the employee is only subject to Medicare tax withholdings</li> </ul> 
63.	<p>The <b>Employee Type</b> and <b>Holiday Schedule</b> fields default based on the Pay Group selected. If “Absence Management” is selected, the <b>Pay Group</b> field within the <b>Absence Management System</b> section auto-populates based on the Pay Group previously selected in the <b>Payroll for North America</b> section.</p> 
64.	<p>Click the <b>Tax Location Code Look Up</b> icon and select the applicable code based on the location of the employee’s office.</p> 
65.	<p>The <b>Use Pay Group Eligibility</b> checkbox option is selected by default. De-select this checkbox option.</p> 

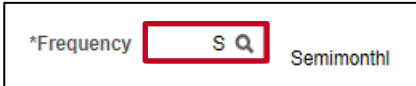
Step	Action
66.	<p>Click the <b>Eligibility Group Look Up</b> icon and select the applicable Eligibility Group for the employee.</p> 
	<p>For further information on updating the Eligibility Group, see the Job Aid titled <b>TA374_Absence Management Leave Types and Eligibility</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
67.	<p>Scroll up to the top of the page as needed and click the <b>Salary Plan</b> tab.</p> 
<p>The <b>Salary Plan</b> tab displays.</p> 	
68.	<p>Review the Salary Plan information. This information comes from the position.</p>
	<p>If the Salary Plan information is incorrect, cancel the action and make corrections to the Position before assigning the employee to the Position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion. For further information on updating Position Data, see the Job Aid titled <b>HR351_Managing a Position and Job Change</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>
69.	<p>If the Salary Plan information is correct, click the <b>Compensation</b> tab.</p> 

Step	Action
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The **Compensation** tab displays.



70.	If not already populated, enter or select the employee's pay frequency in the <b>Frequency</b> field (e.g., "S" for Semimonthly; "H" for Hourly).
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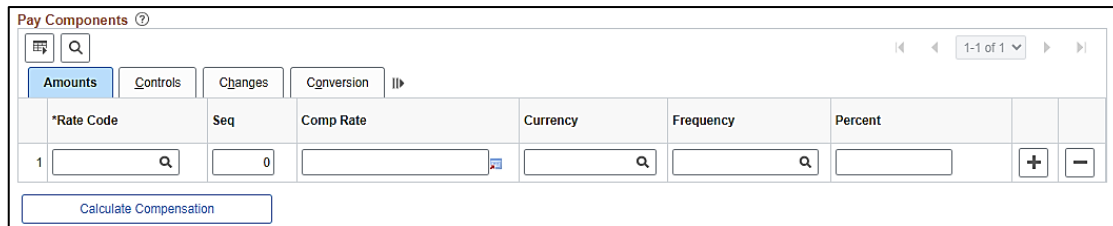


71.	Click the <b>Default Pay Components</b> button.
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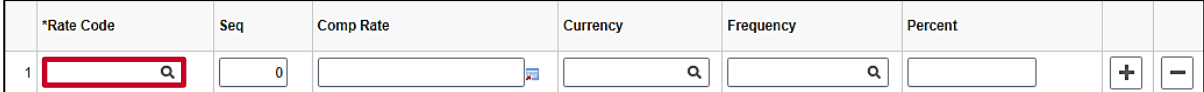



72.	Scroll down to the <b>Pay Components</b> section as needed.
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The **Pay Components** section displays.



73.	Click the <b>Rate Code Look Up</b> icon and select the applicable Rate Code.
-----	------------------------------------------------------------------------------



Step	Action																																
74.	<p>Enter the compensation to pay the employee (Annual Salary or Hourly Rate) in the <b>Comp Rate</b> field.</p> <table border="1"> <thead> <tr> <th>*Rate Code</th> <th>Seq</th> <th>Comp Rate</th> <th>Currency</th> <th>Frequency</th> <th>Percent</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text" value="0"/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> </tbody> </table>	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent			1	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="+"/>	<input type="button" value="-"/>																
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75.	<p>The <b>Currency</b> and <b>Frequency</b> fields default based on the Rate Code selected.</p>																																
	<p>If multiple Rate Codes need to be entered, click the <b>Add a New Row</b> icon (+) and repeat steps 73 - 75.</p> <table border="1"> <thead> <tr> <th>*Rate Code</th> <th>Seq</th> <th>Comp Rate</th> <th>Currency</th> <th>Frequency</th> <th>Percent</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td><input type="text" value="0"/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="text" value=""/></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> </tbody> </table>	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent			1	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="+"/>	<input type="button" value="-"/>																
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1	<input type="text" value="0"/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="button" value="+"/>	<input type="button" value="-"/>																										
76.	<p>Click the <b>Calculate Compensation</b> button.</p> <div style="border: 1px solid red; padding: 5px; display: inline-block;"> <input type="button" value="Calculate Compensation"/> </div>																																
<p>The <b>Compensation</b> tab refreshes.</p> <div style="border: 1px solid gray; padding: 10px;"> <p>Pay Components <span>⊙</span></p> <p><input type="button" value="Print"/> <input type="button" value="Search"/></p> <p>1-3 of 3</p> <table border="1"> <thead> <tr> <th>*Rate Code</th> <th>Seq</th> <th>Comp Rate</th> <th>Currency</th> <th>Frequency</th> <th>Percent</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>1 STATE</td> <td><input type="text" value="0"/></td> <td><input type="text" value="40,000.000000"/></td> <td>USD</td> <td>A</td> <td></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> <tr> <td>2 NONST</td> <td><input type="text" value="0"/></td> <td><input type="text" value="10,000.000000"/></td> <td>USD</td> <td>A</td> <td></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> <tr> <td>3 SPPAY</td> <td><input type="text" value="0"/></td> <td><input type="text" value="1,200.000000"/></td> <td>USD</td> <td>A</td> <td></td> <td><input type="button" value="+"/></td> <td><input type="button" value="-"/></td> </tr> </tbody> </table> <p><input type="button" value="Calculate Compensation"/></p> <p>Job Data    Employment Data    Earnings Distribution    Benefits Program Participation</p> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> <span style="float: right;"><input type="button" value="Refresh"/></span></p> </div>		*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent			1 STATE	<input type="text" value="0"/>	<input type="text" value="40,000.000000"/>	USD	A		<input type="button" value="+"/>	<input type="button" value="-"/>	2 NONST	<input type="text" value="0"/>	<input type="text" value="10,000.000000"/>	USD	A		<input type="button" value="+"/>	<input type="button" value="-"/>	3 SPPAY	<input type="text" value="0"/>	<input type="text" value="1,200.000000"/>	USD	A		<input type="button" value="+"/>	<input type="button" value="-"/>
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3 SPPAY	<input type="text" value="0"/>	<input type="text" value="1,200.000000"/>	USD	A		<input type="button" value="+"/>	<input type="button" value="-"/>																										
77.	<p>Click the <b>Employment Data</b> link at the bottom of the page.</p> <div style="border: 1px solid gray; padding: 5px;"> <p>Job Data    <span style="border: 1px solid red; padding: 2px;">Employment Data</span>    Earnings Distribution    Benefits Program Participation</p> </div>																																

Step	Action
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The **Employment Information** page displays.

Employment Information

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John Doe Empl ID 00863024900  
Employee Empl Record 0

**Organizational Instance** ?


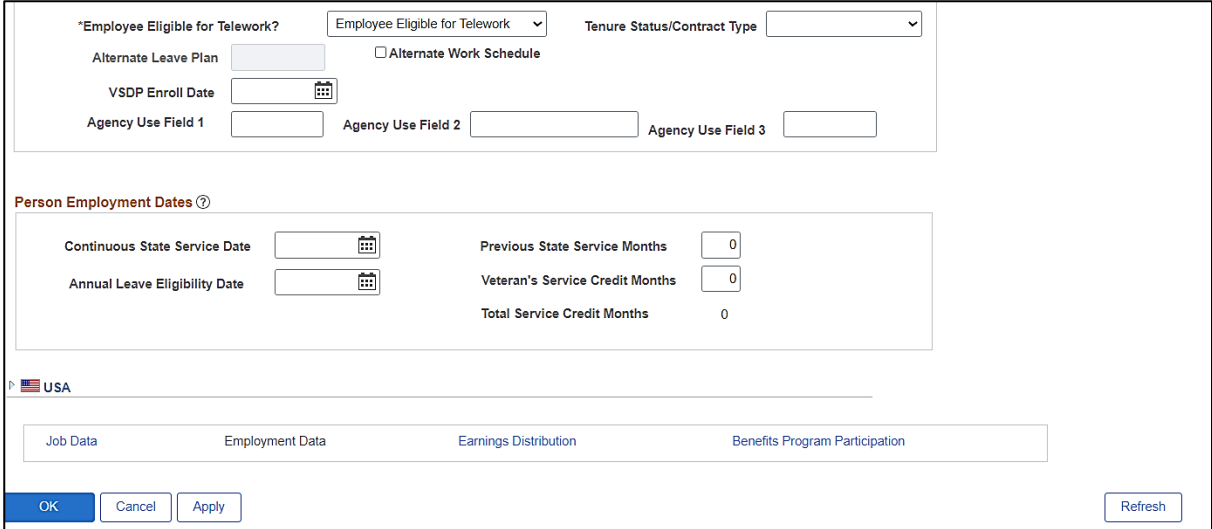
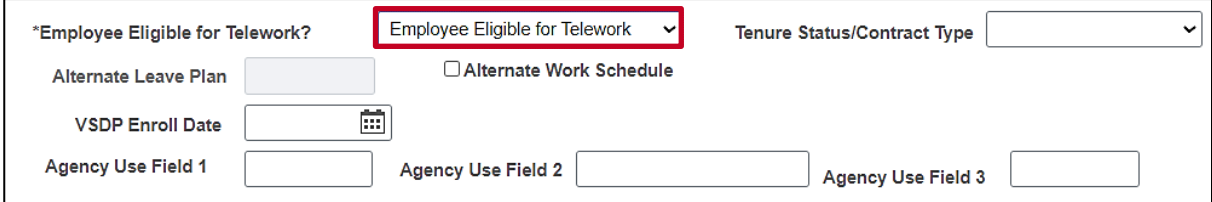

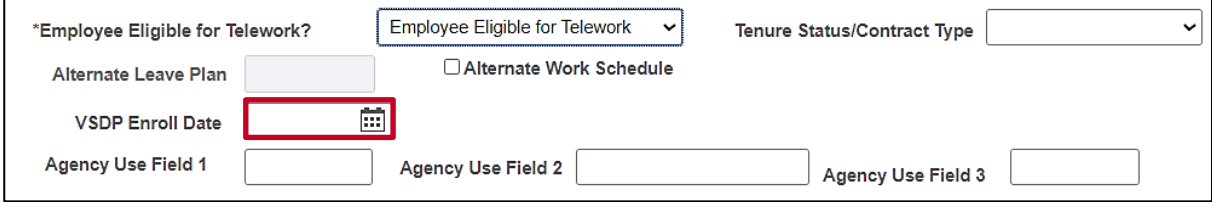
Organizational Instance Rcd 0	Original Start Date 10/14/2024	<input type="checkbox"/> Override
Last Start Date	First Start Date	
Termination Date	Years Months Days	
Org Instance Service Date 10/14/2024	<input type="checkbox"/> Override <span style="color: green;">↺</span>	0 0 0


**Organizational Assignment Data** ?

**Instance Record**


Last Assignment Start Date 10/14/2024	First Assignment Start 10/14/2024	
Assignment End Date		
Home/Host Classification Home	Years Months Days	<a href="#">Time Reporter Data</a>
Company Seniority Date 10/14/2024	<input type="checkbox"/> Override <span style="color: green;">↺</span>	0 0 0
Benefits Service Date 10/14/2024	<input type="checkbox"/> Override <span style="color: green;">↺</span>	0 0 0
Seniority Pay Calc Date 10/14/2024	<input type="checkbox"/> Override <span style="color: green;">↺</span>	0 0 0
VSDP Sick/PER Leave Effct Date	0 0 0	
Probation Date <input type="text" value=""/>	Last Verification Date <input type="text" value=""/>	

78.	<p>If the employee is a Classified new hire employee, click the <b>Probation Date Calendar</b> icon and select the date one year from the hire/rehire date, if applicable.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p><b>Probation Date</b> <span style="border: 2px solid red; padding: 2px;">10/18/2025</span> </p> <p><b>Business Title</b> Program Support Technician</p> </div>
79.	<p>Scroll down on the page.</p>

Step	Action
	<p>Before recording the employee's telework status, the Agency HR administrator should verify if the employee will be teleworking. 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> 
80.	<p>Click the <b>Employee Eligible for Telework</b> dropdown button and select the applicable value based on the employee's eligibility for telework.</p> 
	<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>
81.	<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> 



Step	Action												
82.	<p>Enter the <b>Continuous State Service Date</b> and select the employee's hire/rehire date. This field is used to determine the employee's eligibility for legislative pay increases for all salaried employees, as well as severance, and benefits at layoff for VPA covered employees (if applicable).</p> <div data-bbox="256 478 1175 688" style="border: 1px solid black; padding: 5px;"> <p><b>Person Employment Dates</b> ⓘ</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Continuous State Service Date</td> <td style="width: 33%; border: 1px solid red; padding: 2px;">10/18/2024 ⓘ</td> <td style="width: 33%;">Previous State Service Months</td> <td style="width: 10%; text-align: center;">0</td> </tr> <tr> <td>Annual Leave Eligibility Date</td> <td style="border: 1px solid gray; padding: 2px;">10/18/2024 ⓘ</td> <td>Veteran's Service Credit Months</td> <td style="text-align: center;">0</td> </tr> <tr> <td colspan="3">Total Service Credit Months</td> <td style="text-align: center;">0</td> </tr> </table> </div>	Continuous State Service Date	10/18/2024 ⓘ	Previous State Service Months	0	Annual Leave Eligibility Date	10/18/2024 ⓘ	Veteran's Service Credit Months	0	Total Service Credit Months			0
Continuous State Service Date	10/18/2024 ⓘ	Previous State Service Months	0										
Annual Leave Eligibility Date	10/18/2024 ⓘ	Veteran's Service Credit Months	0										
Total Service Credit Months			0										
83.	<p>If the employee has any previous State service months (rehires only), enter the applicable number of months of previous State service in the <b>Previous State Service Months</b> field. Use the <b>HR351_Managing Service Dates Calculator</b> when the employee has prior State service or Veteran's Service Credit Months.</p> <div data-bbox="256 877 1175 1087" style="border: 1px solid black; padding: 5px;"> <p><b>Person Employment Dates</b> ⓘ</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Continuous State Service Date</td> <td style="width: 33%; border: 1px solid gray; padding: 2px;">10/18/2024 ⓘ</td> <td style="width: 33%;">Previous State Service Months</td> <td style="width: 10%; border: 1px solid red; text-align: center;">0</td> </tr> <tr> <td>Annual Leave Eligibility Date</td> <td style="border: 1px solid gray; padding: 2px;">10/18/2024 ⓘ</td> <td>Veteran's Service Credit Months</td> <td style="text-align: center;">0</td> </tr> <tr> <td colspan="3">Total Service Credit Months</td> <td style="text-align: center;">0</td> </tr> </table> </div>	Continuous State Service Date	10/18/2024 ⓘ	Previous State Service Months	0	Annual Leave Eligibility Date	10/18/2024 ⓘ	Veteran's Service Credit Months	0	Total Service Credit Months			0
Continuous State Service Date	10/18/2024 ⓘ	Previous State Service Months	0										
Annual Leave Eligibility Date	10/18/2024 ⓘ	Veteran's Service Credit Months	0										
Total Service Credit Months			0										
84.	<p>If the employee has any veteran service and has provided their military service documentation (DD214), enter the applicable number of veteran's service months in the <b>Veteran's Service Credit Months</b> field.</p> <div data-bbox="256 1241 1175 1451" style="border: 1px solid black; padding: 5px;"> <p><b>Person Employment Dates</b> ⓘ</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Continuous State Service Date</td> <td style="width: 33%; border: 1px solid gray; padding: 2px;">10/18/2024 ⓘ</td> <td style="width: 33%;">Previous State Service Months</td> <td style="width: 10%; text-align: center;">0</td> </tr> <tr> <td>Annual Leave Eligibility Date</td> <td style="border: 1px solid gray; padding: 2px;">10/18/2024 ⓘ</td> <td>Veteran's Service Credit Months</td> <td style="border: 1px solid red; text-align: center;">0</td> </tr> <tr> <td colspan="3">Total Service Credit Months</td> <td style="text-align: center;">0</td> </tr> </table> </div>	Continuous State Service Date	10/18/2024 ⓘ	Previous State Service Months	0	Annual Leave Eligibility Date	10/18/2024 ⓘ	Veteran's Service Credit Months	0	Total Service Credit Months			0
Continuous State Service Date	10/18/2024 ⓘ	Previous State Service Months	0										
Annual Leave Eligibility Date	10/18/2024 ⓘ	Veteran's Service Credit Months	0										
Total Service Credit Months			0										
	<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. The annual leave accrual is determined by using prior State service and veteran's service in the military, National Guard, or Reserves.</p>												



Step	Action												
85.	<p>Complete the <b>Annual Leave Eligibility Date</b> field by selecting either:</p> <ul style="list-style-type: none"> <li>The employee's hire date if they have no prior State service or veteran's service credit months</li> <li>The calculated Annual Leave Eligibility Date that was determined using the HR351_Managing Service Dates Calculator (if the employee has prior State service or veteran's service credit months)</li> </ul> <div data-bbox="256 562 1175 772" style="border: 1px solid black; padding: 5px;"> <p><b>Person Employment Dates</b> <small>?</small></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Continuous State Service Date</td> <td style="width: 33%;">10/18/2024 <small>📅</small></td> <td style="width: 33%;">Previous State Service Months</td> <td style="width: 33%;">0</td> </tr> <tr> <td>Annual Leave Eligibility Date</td> <td>10/18/2024 <small>📅</small></td> <td>Veteran's Service Credit Months</td> <td>0</td> </tr> <tr> <td></td> <td></td> <td>Total Service Credit Months</td> <td>0</td> </tr> </table> </div>	Continuous State Service Date	10/18/2024 <small>📅</small>	Previous State Service Months	0	Annual Leave Eligibility Date	10/18/2024 <small>📅</small>	Veteran's Service Credit Months	0			Total Service Credit Months	0
Continuous State Service Date	10/18/2024 <small>📅</small>	Previous State Service Months	0										
Annual Leave Eligibility Date	10/18/2024 <small>📅</small>	Veteran's Service Credit Months	0										
		Total Service Credit Months	0										
	<p>The <b>Annual Leave Eligibility Date</b> field must be updated for all VPA covered employees and salaried employees for Agencies that use Cardinal Absence Management. This field auto-populates the <b>Company Seniority Date</b> field. 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>												
86.	<p>Click the <b>Benefits Program Participation</b> link at the bottom of the page.</p> <div data-bbox="256 1094 1458 1167" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center;"> <a href="#">Job Data</a>     <a href="#">Employment Data</a>     <a href="#">Earnings Distribution</a>     <a href="#">Benefits Program Participation</a> </p> </div>												

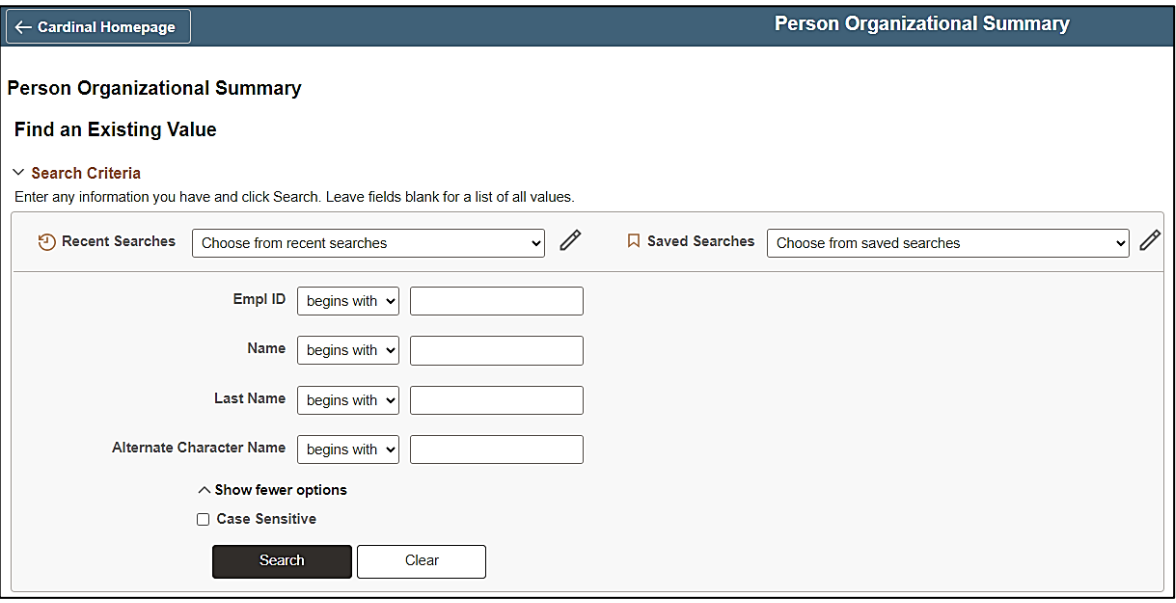

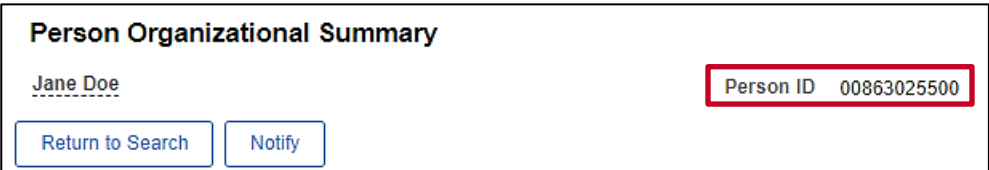


Step	Action									
The <b>Benefits Program Participation</b> page displays.										
<div><p><b>Benefit Program Participation</b></p><p>Employee [redacted]      Empl ID [redacted] Empl Record 0</p><p><b>Benefit Status</b> [search]   1 of 1</p><p>Benefit Record Number 0  <span>Go To Row</span></p><p>Effective Date 01/01/2025 Effective Sequence 0      Action Hire HR Status Active      Reason New Hire Payroll Status Active      Job Indicator Primary Job</p><p>*Benefits System <b>Benefits Administration</b>      Current  Benefits Employee Status Active</p><p>Annual Benefits Base Rate [input] USD      <a href="#">ACA Eligibility Details</a></p><p><b>Benefits Administration Eligibility</b></p><table border="1"><tr><td>BAS Group ID [input] </td><td>Elig Fld 2 [input] </td><td>Elig Fld 3 [input] </td></tr><tr><td>Elig Fld 1 [input] </td><td>Elig Fld 5 [input] </td><td>Elig Fld 6 [input] </td></tr><tr><td>Elig Fld 4 [input] </td><td>Elig Fld 8 [input] </td><td>Elig Fld 9 [input] </td></tr></table></div>		BAS Group ID [input]	Elig Fld 2 [input]	Elig Fld 3 [input]	Elig Fld 1 [input]	Elig Fld 5 [input]	Elig Fld 6 [input]	Elig Fld 4 [input]	Elig Fld 8 [input]	Elig Fld 9 [input]
BAS Group ID [input]	Elig Fld 2 [input]	Elig Fld 3 [input]								
Elig Fld 1 [input]	Elig Fld 5 [input]	Elig Fld 6 [input]								
Elig Fld 4 [input]	Elig Fld 8 [input]	Elig Fld 9 [input]								
<p><b>Benefit Program Participation Details</b> [search]   1 of 1   View All</p> <p>Effective Date 04/25/2025      Currency Code Benefit Program</p> <p><a href="#">Job Data</a>      <a href="#">Employment Data</a>      <a href="#">Earnings Distribution</a>      <a href="#">Benefits Program Participation</a></p> <p><b>OK</b>      <b>Cancel</b>      <b>Apply</b></p>										

Step	Action
87.	<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> <div data-bbox="272 869 1442 1100" style="border: 1px solid black; padding: 5px;"> <p><b>Benefits Administration Eligibility</b> ☺</p> <p>BAS Group ID <input type="text"/></p> <p>Elig Fld 1 <input type="text"/></p> <p>Elig Fld 4 <input type="text"/></p> <p>Elig Fld 7 <input type="text"/></p> <p>Elig Fld 2 <input style="border: 2px solid red;" type="text"/></p> <p>Elig Fld 5 <input type="text"/></p> <p>Elig Fld 8 <input style="border: 2px solid red;" type="text"/></p> <p>Elig Fld 3 <input style="border: 2px solid red;" type="text"/></p> <p>Elig Fld 6 <input type="text"/></p> <p>Elig Fld 9 <input style="border: 2px solid red;" type="text"/></p> </div>
	<p>Do not make any updates to the <b>Benefit Program Participation Details</b> section.</p> <p>For further information on the Eligibility Configuration valid values, refer to the Job Aid titled <b>BN361_Overview of the Eligibility Configuration Fields</b>. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
88.	<p>Review all the information entered for the employee using the <b>Job Data</b> link at the bottom of the page to go back through the tabs. Update anything that is entered incorrectly.</p> <div data-bbox="256 1402 1252 1457" style="border: 1px solid black; padding: 5px;"> <p><span style="border: 2px solid red; padding: 2px;">Job Data</span>      Employment Data      Earnings Distribution      Benefits Program Participation</p> </div>
	<p>Once the record is saved, if anything is incorrect a help desk ticket must be entered to make the correction. If any of the following fields are blank, a warning message will display: <b>Elig Fld 2</b>, <b>Elig Fld 3</b>, <b>Elig Fld 8</b>, and <b>Elig Fld 9</b>.</p>
89.	<p>Continue to the <a href="#">Agency Next Steps After Entering New Hire</a> section of this Job Aid.</p>

### Hiring a Person When Personal Data (Employee ID) Exists in Cardinal


There are times when only personal data exists in Cardinal for a person. When this is the case, only the person's name and Employee ID will display on the **Person Organizational Summary** page. To complete the hire, the person must be hired by creating a new employment instance to create an employee record.

Step	Action
1.	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>The <b>Person Organizational Summary Find an Existing Value</b> page displays.</p> 	
2.	Enter any search criteria and then click the <b>Search</b> button. 
3.	Copy the Employee ID from the <b>Person ID</b> field. 

Step	Action
4.	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 Relationships &gt; New Employment Instance</b>

The **New Employment Instance** page displays.



	Validate that the correct Employee ID and Employee Record Number are displayed. For a brand-new hire, the employee record should be Employee Record Number "0".
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5.	Click the <b>Add Relationship</b> button. <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p style="text-align: center;">Empl ID 00863025500</p> <p>Empl Record 0</p> <p style="text-align: center;"> <span style="border: 2px solid red; padding: 5px 20px; background-color: #4a86e8; color: white; display: inline-block;">Add Relationship</span> </p> </div>
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Step	Action
	<p>The <b>New Employment Instance</b> page displays with the <b>Work Location</b> tab displayed by default.</p> <div data-bbox="149 378 1461 1081"><p><b>New Employment Instance</b></p><p>Work Location   Job Information   Job Labor   Payroll   Salary Plan   Compensation</p><p>Jane Doe Employee      Empl ID 00863025500 Empl Record 0</p><p><b>Work Location Details</b> (1 of 1)</p><p>*Effective Date: 10/21/2024 Effective Sequence: 0 HR Status: Active Payroll Status: Active *Action: Hire Reason:  *Job Indicator: Primary Job</p><p>Position Number:  Position Entry Date:  *Regulatory Region: USA</p></div>
6.	Complete the hire as detailed in the <a href="#">Completing a New Hire</a> section of this Job Aid beginning with Step 52.

**Agency Next Steps After Entering the New Hire**

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

- For further information on entering citizenship information, updating personal data, and the telework agreement, see 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 complete state and federal withholding forms, direct deposit elections, etc. per established business practices. If tax withholding paperwork is not collected and entered prior to the first payroll period, withholdings will default to single and zero. State taxes default to VA.

Coordinate with an Agency Benefits Administrator to ensure that eligible employees complete their benefit elections (within 30 days per OHB policy).

- For further information on completing benefit elections, see the Job Aid titled **BN361\_ Completing a New Hire Enrollment**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**

Coordinate with an Agency Time and Labor (TL) Administrator to ensure that all employees are assigned the applicable Work Schedule (can be assigned by either a TL Administrator or the employee's supervisor) and review their TA eligibilities (i.e., overtime, comp leave, etc.).

- For further information on assigning Work Schedules, see Job Aid titled **TA\_ Maintaining Employee Work Schedules**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**