



Managing Position Data Overview

Positions are required and tracked, whether they are vacant or filled. Agencies will continue to utilize Agency-specific systems or paper forms outside of Cardinal to capture position information and route for approvals (e.g., Agency budget, HR approvals) within the Agency. The Position Number is unique for each Agency and begins with the Cardinal three-digit Company code that represents the Agency. The Position Number is needed before adding or cloning a position.

Positions are created before an employee is hired. Once hired, an employee is associated to the position for which they were hired, and additional job data information is completed. The job data information inherits the position data that is selected at the time of adding a new hire or when moving an employee into a new position. Details or information regarding the position are first changed at the position level and are then conveyed to the associated employee's job data record.

Positions are created for all employees. Cardinal position management supports Human Resources, Benefits, Time and Attendance, and Payroll. COVA uses positions to track the details of a specific job in a department or location that typically has a one-to-one relationship with employees. On occasion, there may be multiple employees using the same Position Number. If the position headcount is less than the number of employees, a warning message will appear on job data. Data is attached to the positions, and employees move in and out of those positions. If a pay reduction is required, make sure it is in accordance with DHRM Policy 1.60 and 3.05 and use Position Action of "POS/DIP".

If a new Job Code is required, work with DHRM to add the required Job Code prior to entering the new position. If a Job Code is changed on a position that affects an incumbent, it may be necessary to then enter the related compensation change on the incumbent's job record.

If position level funding is utilized, review the ChartField distribution when changing position attributes using the Job Aid titled **HR351 Position ChartField Assignment and Update**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**. This data is exclusively maintained by employees with security access to the Department Budget Table.

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.

Table of Contents

Revision History	3
Creating a Position.....	4
Position Data Header Fields:.....	6
Cloning a Position	26
Updating Position Data When an Incumbent Exists	32



Revision History

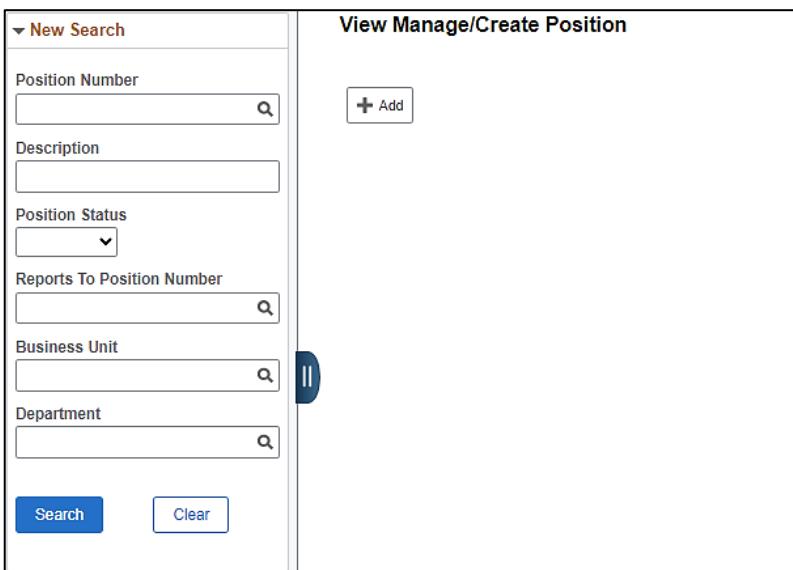
Revision Date	Summary of Changes
1/9/2026	Note added to the USA fields in the Position Data Header Fields section regarding FLSA Status changes.
7/25/2025	Added an explanation note in Section 3 after Step 10 regarding a new Position Effective Date error.
12/3/2024	Baseline.

Creating a Position

Use this process to create a new position in Cardinal.

Step	Action
1.	<p>Navigate to the Manage/Create Position page using the following path:</p> <p>NavBar > Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position</p>

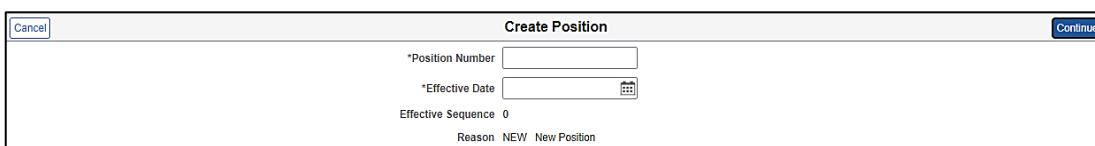
The **Manage/Create Position** page displays.



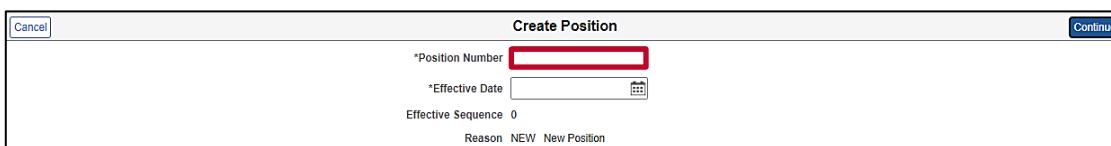
2. Click the **Add** button.

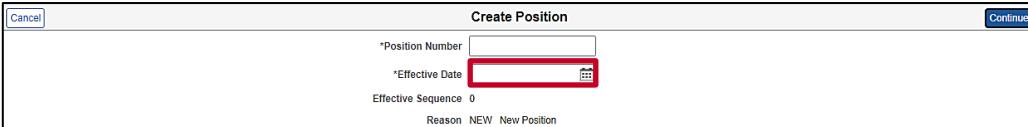


The **Create Position** page displays.



3. Enter the applicable Position Number in the **Position Number** field.



Step	Action
	<p>Do not use the ORP designator in any Position Number for active employment as this is reserved for ORP retirees and will result in data being omitted from queries and extracts.</p>
4.	<p>The Effective Date field must be updated to the applicable effective date for the new position as needed using the Calendar icon and must be:</p> <ol style="list-style-type: none"> Greater than or equal to the effective date of the position's Job Code (which is maintained by DHRM) <p>AND</p> <ol style="list-style-type: none"> Less than or equal to the effective date of any employee job transaction(s) 
	<p>For further information on effective dating, refer to the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>

The **Create Position** page displays with the **Position Data Step 1 of 4** displayed by default.

	<p>Various fields can be (or must be) entered on the Position Data Step 1 of 4 of the Create Position page. It is important to review all the fields on each step (in order) as some fields are dependent on others. Review the following tables for information related to each field.</p>
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Position Data Header Fields:

Field	Required	Value	Description	Comments
Effective Date	Y	Date	Effective dates are used to store historical, current, and future information for the position	Read-only. Defaults from previous entry
Effective Sequence	Y	Incremental Number	Effective sequence tracks the sequence of changes in rows with the same effective date for transactional history	Read-only. Systematically assigned as applicable
Reason Code	Y	Code	Action Reason Code used to describe the type of changes being made to the position	Read-only. Defaults from previous selection on the Request Details page. Defaults to NEW when creating or cloning a position
Review Date	N	Date	Next date the position is to be reviewed due to prevailing circumstances at the time of establishment (e.g., funding from sources of an indeterminate duration)	Optionally enter/select a review date for the position
Position Months	Y	Numeric	Number of Months per Year that the position will be filled	Enter the number of Months per Year that the position will be filled
Stmt of Economic Interest (SOEI) Reqd	Y	Yes/No	Y = Yes: Statement of Economic Interest is required N = No: Statement of Economic Interest not required	Defaults to "No". Update as needed



Field	Required	Value	Description	Comments
VPA Covered	N	Yes/No	<p>This field will indicate if the position is covered by the Virginia Personnel Act (VPA).</p> <p>For all classified positions, this must be Y. For all other positions this must be N. Incorrect data will result in inaccurate report results</p>	Defaults to "No". Update as needed

Position Information section screenshot:

Position Information

*Position Status	Approved	Max Head Count	1
*Status	Active	Status Date	11/21/2024
Action Date	11/21/2024	SOC Code / Extension	<input type="text"/>
Alternate Work Schedule	<input type="radio"/> No	Job Sharing Permitted	<input type="radio"/> No
Key Position	<input type="radio"/> No	Available for Telework	<input type="radio"/> No
Budgeted Position	<input checked="" type="radio"/> Yes	*EEO-4 Job Category	<input type="text"/>
Confidential Position	<input type="radio"/> No	*Workers' Comp Code	<input type="text"/>

Position Information fields:

Field	Required	Value	Description	Comments
Position Status	Y	Approved Frozen Proposed	Current status of the position	Defaults to "Approved". Update as needed. Frozen positions continue to populate and count towards strength reports. Proposed is not used in Cardinal



Field	Required	Value	Description	Comments
Max Head Count	Y	Numeric	The number of employees that can be assigned to the position (positions normally have a one-to-one relationship with employees) unless the position permits job sharing or can be assigned to multiple incumbents	Defaults to "1". Update to the applicable count if the position permits job sharing or will be assigned to multiple incumbents (e.g., dual incumbency or Pooled Positions)
Status	Y	Active/Inactive	Current status of "Active" or "Inactive" for the position	Defaults to "Active". Inactive positions do not populate to strength reports. Positions cannot be abolished in Cardinal, use "Inactive" instead
Status Date	N	Date	Date that the current status was applied to the position	Defaults to the current system date. Update as needed
Action Date	N	Date	Provides the date for the update action	Defaults to the current system date. Do not change
Alternate Work Schedule	N	Yes/No	Designates whether the employee is actively working an Alternate Work Schedule. This field must be set to "Y" before the Employee Alternate Work Schedule field can be set to "Y" on the Job record	Defaults to "No". Update as needed



Field	Required	Value	Description	Comments
SOC Code/Extension	Y	Numeric (ignore punctuation) Ex: 11-1021.125 SOC code is 111021125	Used to identify the Federal Standard Occupational Classification (SOC) code For more information, see Job Aid titled, HR351 Overview of SOC and Job Code Combinations	This field is required for Classified and Agency Head Employees. It is Optional for all other employee types
Key Position	N	Yes/No	Indicates whether the position is a key position	COVA is not currently using this field
Budgeted Position	Y	Yes/No	Indicates whether the position is part of the Agency budget	Defaults to "Yes". Update as needed
Job Sharing Permitted	N	Yes/No	Indicates whether job sharing is permitted for the position	Defaults to "No". Update as needed
Confidential Position	N	Yes/No	Indicates whether the position is a confidential position (e. g., Undercover officers)	Defaults to "No". Update as needed. If confidential position is checked, the position nor incumbents will be reported out in the Active directory or employee directory extracts
Available for Telework	Y	Yes/No	Indicates whether the position is available for telework	Defaults to "No". Update as needed

Field	Required	Value	Description	Comments
EEO-4 Job Category	Y	1 = Officials and Administrators 2 = Professional 3 = Technicians 4 = Protective Service 5 = Paraprofessional 6 = Office/Clerical 7 = Skilled Craft 8 = Service Maintenance N = No EEO-4 Reporting	Equal Employment Opportunity Occupational Code (EEO). Federal code associated with this position. Code identifies the primary occupational activity of the employee	Select the appropriate EEO-4 Job Category The default value for all job codes will be N if Agency does not override the value
Worker's Comp Code	Y	Code	The Workers' Compensation hazard code identifies the type of work being performed for the purpose of determining the Agency's WC premium and claims experience modification factor	The codes are on the DHRM Worker Comp website

Job Information section screenshot:

Job Information					
*Business Unit	15100	Department of Accounts	*Full/Part Time	Full-Time	
*Job Code			Union Code		
*Regular/Temporary			Short Title		
*Regular Shift	Not Applicable		Description		
*Title					



Job Information fields:

Field	Required	Value	Description	Comments
Business Unit	Y	5-Digit Numeric Code	Indicates the Business Unit associated with the position. The Business Unit drives the first three alpha-characters of the Position Number	Defaults to the user's Business Unit and can only be updated if the user has access to multiple Business Units. Currently the Agency number (3 digits with two 00s added at the end)
Job Code	Y	5-Digit Numeric Code and associated Job Title	Indicates the unique code and title associated with a specific job For more information regarding Agency Heads and Classified job codes, see the Job Aid titled HR351 Overview of SOC and Job Code Combinations	All Wage Job Codes must begin with a W. Only Classified Job Codes are to be used for VPA covered positions. Do not use Classified Job Codes for non-VPA positions. Prior to updating, make a note of the current values in the Regular/Temporary, Full/Part Time, and FLSA Status fields as these values may need to be re-applied after updating the Job Code NOTE: This is the title that appears on most reports
Regular/Temporary	Y	Regular Restricted Temporary	Indicates whether the position is regular, restricted, or temporary	Select the applicable value
Regular Shift	Y	Defaults	This field is not utilized in Cardinal	Defaults to "Not Applicable". Do not change
Title	Y	Defaults	Provides the Title associated with the Job Code	Update as needed to reflect the working title



Field	Required	Value	Description	Comments
Full/Part Time	Y	Full-Time Part-Time Quasi	Indicates whether the position is a full-time, part-time, or quasi position	If changing the position's Job Code, this field will default to "Full-Time". If the incumbent is a quasi or part-time employee, verify this field is updated. The Full time/Part time field on Position can and should be adjusted accordingly
Union Code	N		This field is not utilized in Cardinal	
Short Title	N	5-Digit Numeric Code	Defaults from the Job Code	Do not update
Description	N	Defaults	Defaults from Job Code	Update as needed to reflect the working title. The KSA can be populated if desired. This field allows for more than 250 characters

Work Location section screenshot:

Work Location			
*Reg Region	USA <input type="button" value="🔍"/>	United States	*Company <input type="button" value="🔍"/>
*Department	<input type="button" value="🔍"/>	Dot-Line <input type="button" value="🔍"/>	
Location	<input type="button" value="🔍"/>	Security Clearance <input type="button" value="🔍"/>	
Reports To	<input type="button" value="🔍"/>	Supervisor Position <input type="button" value="🔍"/>	
Supervisor Level	<input type="button" value="🔍"/>	Appointed Category <input type="button" value="N/A"/>	

Work Location fields:

Field	Required	Value	Description	Comments
Reg Region	Y	Defaults	Indicates the work location region	Defaults to "USA". Do not change as this effects Federal Government reporting
Company	Y	3-digit alpha-numeric code	Defaults from the Business Unit	Same 3 characters used to establish the Position Number
Department	Y	Max 10-digit numeric code	Indicates the position's department	Select the appropriate Department Note: When changing the department for an existing position, department/position level funding may need to be established.
Location	Y	3–5-digit alpha-numeric code	Indicates the physical work location for the position (where the incumbent sits or works), which impacts whether the salary plan is SW or NV for classified salary grades. Location code also impacts Healthcare Plan eligibility coverage. If telework, consider and designate region of Commonwealth incumbent teleworks	Select the appropriate Location. Location codes will determine COVA salary plans and benefits eligibility



Field	Required	Value	Description	Comments
Reports To	Y	Position Number	Used to establish reporting relationships. Integrates with Cardinal Financial system	Enter the position's Reports To Position Number. Note: If the Reports To position is temporarily vacant or on a Leave of Absence, approvals will route to the next higher-level Reports To position. This impacts Time and Attendance Approvals.
Supervisor Level	Y	1 digit alpha-character code	Indicates the supervisory level for the position (Employee, Faculty, Manager, or Supervisor)	Enter the position's supervisor level
Dot-Line	N	Position Number	Used to indicate that this position has a dotted line reporting relationship to another position	Enter the Position Number to which this position has a dotted line relationship as applicable. Does not impact TA Approval
Security Clearance	N	Code	Used to identify the required security clearance for the position holder as applicable	Not utilized in Cardinal
Supervisor Position	N	Position Number	Provides the Position Number of the employee's daily/operational supervisor	Optionally enter the Position Number. This can be different than the Reports To

Field	Required	Value	Description	Comments
Appointed Category	N	Governor Appointed Board Appointed Elected Official Legislative Not Applicable	For "At Will" positions, select the applicable Appointed Category. Classified, ungraded, and faculty positions should be left as "N/A"	Defaults to "N/A". Update as needed

Salary Plan Information section screenshot:

Salary Plan Information					
Salary Admin Plan	SW	Grade	5	Step	<input type="text"/>
Standard Hours	40.00				<input type="button" value=""/>
Work Period	W	<input type="button" value=""/>	Weekly		
Mon	8.00	Tue	8.00	Wed	8.00
				Thu	8.00
				Fri	8.00
				Sat	
				Sun	

Salary Plan Information fields:

Field	Required	Value	Description	Comments
Salary Admin Plan	Y	2-digit alpha-character code	Defaults from Job Code As designated on Salary Plan table, which correlates with respective Job code. SET ID = STATE derives classified salary plan when respective job code is selected. Alternate Salary Plan requires DHRM approval and designation of Agency specific SET ID	Read-only



Field	Required	Value	Description	Comments
Grade	Y	Numeric code	Defaults from Job Code As designated on Salary grade table and correlates with Salary Plan/Job Code. For alternate salary plans with DHRM approved Alternate Grades, only DHRM has access to designate a position with an Alternate Grade	Read-only
Standard Hours	Y	Number (in Hours)	Defaults from Job Code	Defaults to 40 hours and should not be changed on the position. This must only be changed on the incumbent's job record for Quasi or PT status
Step	Y	Numeric code	Defaults from Job Code Alternate salary plan and use of steps require Agency specific SET ID. Once alternate set ID is established, (PPS request) Agency will have ability to create steps within the min and max thresholds of the STATE Grade	Update as needed
Work Period	Y	Defaults	Defaults from Job Code	Do not change. Daily hours fields can be viewed if the work period is "Weekly". This does not impact the schedule the employee will work in TA



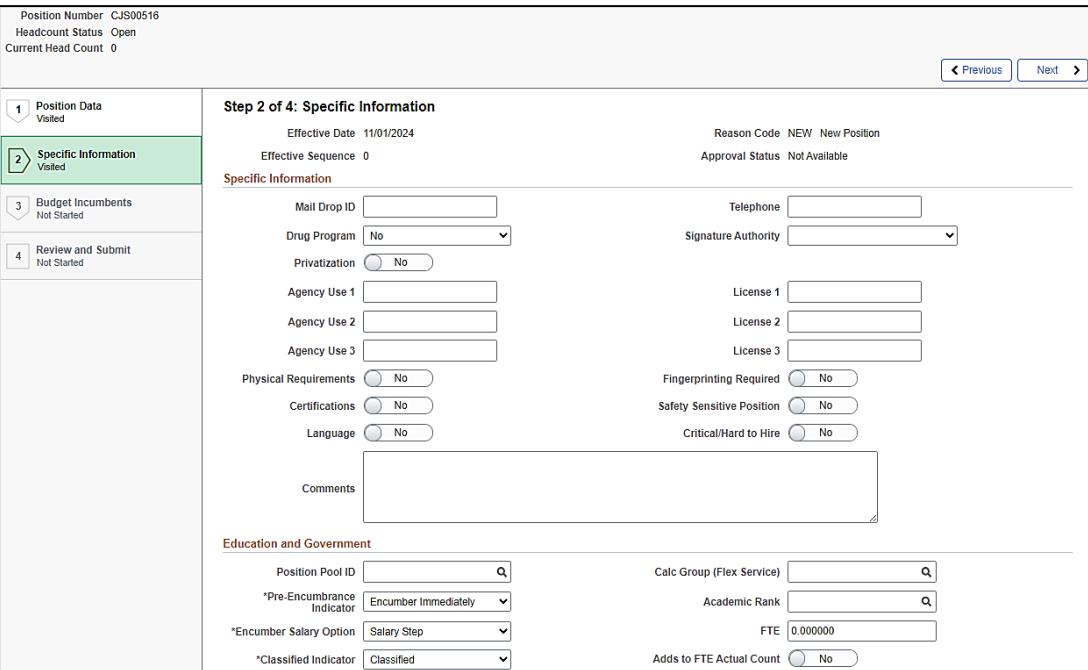
Step	Action
 1	The Specific Information section is not completed on this page but is utilized in the next section.

USA section screenshot:



USA fields:

Field	Required	Value	Description	Comments
FLSA Status	Y	Defaults	Fair Standards Labor Act (FLSA) Values are "Nonexempt" or "Professional"	This will need to be correct because it will impact PY and TA if using the functionality. It will impact reporting for all Agencies Professional = Exempt NOTE: If an update is made to the Job Code field, this field will default to "Nonexempt". NOTE: If the FLSA Status field is being updated intentionally, Payroll Agencies must ensure that the effective date of the change is equal to the first day of the Agency's FLSA work week.
Bargaining Unit	Y	Defaults to "8888"	This field is not utilized in Cardinal	Do not change

Step	Action
6.	Click the Next button in the top right-hand corner of the Position Data page.
	
<p>The Create Position page refreshes with the Specific Information Step 2 of 4 displayed.</p> 	
	See the table below for additional information on Specific Information.

Specific Information fields:

Field	Required	Value	Description	Comments
Mail Drop ID	N	Mail Drop ID	Used to enter the mail drop ID assigned to this position if applicable	Optionally enter as applicable. Not utilized in Cardinal

Field	Required	Value	Description	Comments
Telephone	N	Telephone Number	Used to enter the work phone number assigned to this position if applicable	Optionally enter as applicable. Not utilized in Cardinal
Drug Program	Y	Yes/No	Indicates if the position requires drug testing. (e.g., CDL driver)	Defaults to "No". Update as needed
Signature Authority	N		Indicates the signature authority assigned to the position if applicable	This field is not utilized in Cardinal
Privatization	Y	Yes/No	Indicates if the position was abolished (inactive) because the position/job has been privatized	Defaults to "No". Do not update when creating a new position
Agency Use 1-3	N		Optional free form entry fields that can be used as desired by the Agency to capture unique Agency needs	Enter the applicable information in these fields as needed. Custom fields that have been built for the Commonwealth
License 1-3	N		Optional fields that can be used by the Agency to designate up to three licenses associated with the position	Enter the applicable license information in these fields as needed. Custom fields that have been built for the Commonwealth
Physical Requirements	Y	Yes/No	Used to indicate if there are any physical requirements (such as a requirement to lift heavy objects) for the position. It will default to N	Defaults to "No". If updated to "Yes", enter the applicable information into the Comments field. Custom fields that have been built for the Commonwealth
Fingerprinting Required	Y	Yes/No	Used to indicate if fingerprinting/background is required for the position	Defaults to "No". Update as needed. Custom fields that have been built for the Commonwealth



Field	Required	Value	Description	Comments
Certifications	Y	Yes/No	Used to indicate if there are any certifications required for the position	Defaults to "No". If updated to "Yes", enter the applicable information into the Comments field. Custom fields that have been built for the Commonwealth
Safety Sensitive Position	Y	Yes/No	Used to indicate whether the position is considered by the Agency to be Safety Sensitive (refer to DHRM policy 2.10 – What is a Sensitive Position)	Defaults to "No". Update as needed. Custom fields that have been built for the Commonwealth
Language	Y	Yes/No	Used to indicate if the position has a specific language requirement (other than English)	Defaults to "No". If updated to "Yes", enter the applicable information into the Comments field
Critical/Hard to Hire	Y	Yes/No	Used to indicate that the position is critical/hard to fill due to market availability	Defaults to "No". Update as needed To be used for exceptional recruitment/retention pay action verifications
Comments	N		Free form field used to capture additional information regarding the position	Not to be used for confidential information

Education and Government section screenshot:

Education and Government	
Position Pool ID	<input type="text"/> <input type="button" value=""/>
*Pre-Encumbrance Indicator	Encumber Immediately <input type="button" value=""/>
*Encumber Salary Option	Salary Step <input type="button" value=""/>
*Classified Indicator	Classified <input type="button" value=""/>
Calc Group (Flex Service)	<input type="text"/> <input type="button" value=""/>
Academic Rank	<input type="text"/> <input type="button" value=""/>
FTE	1.000000 <input type="text"/>
Adds to FTE Actual Count	<input type="radio"/> No

Step	Action
i	<p>Only the FTE field in the Education and Government section is used, and it defaults to “1.000000”. See table below for additional information for the FTE field. Do not update any fields in this section.</p> 

Education and Government fields:

Field	Required	Value	Description	Comments
FTE	Y	1.000000 for salaried. Agency discretion for wage/hourly positions	In sync with Standard Hours field above, defaults to 1.000000 FTE	Standard Hours and FTE should only be adjusted on job data for quasi and part-time. FTE for wage/hourly positions is Agency discretion

Step	Action
7.	<p>Click the Next button in the top right-hand corner of the page after all required reviews and updates are completed for the Specific Information page.</p> 

Step	Action
The Create Position page displays with the Budget Incumbents Step 3 of 4 displayed.	

Budget Incumbents sections screenshot:

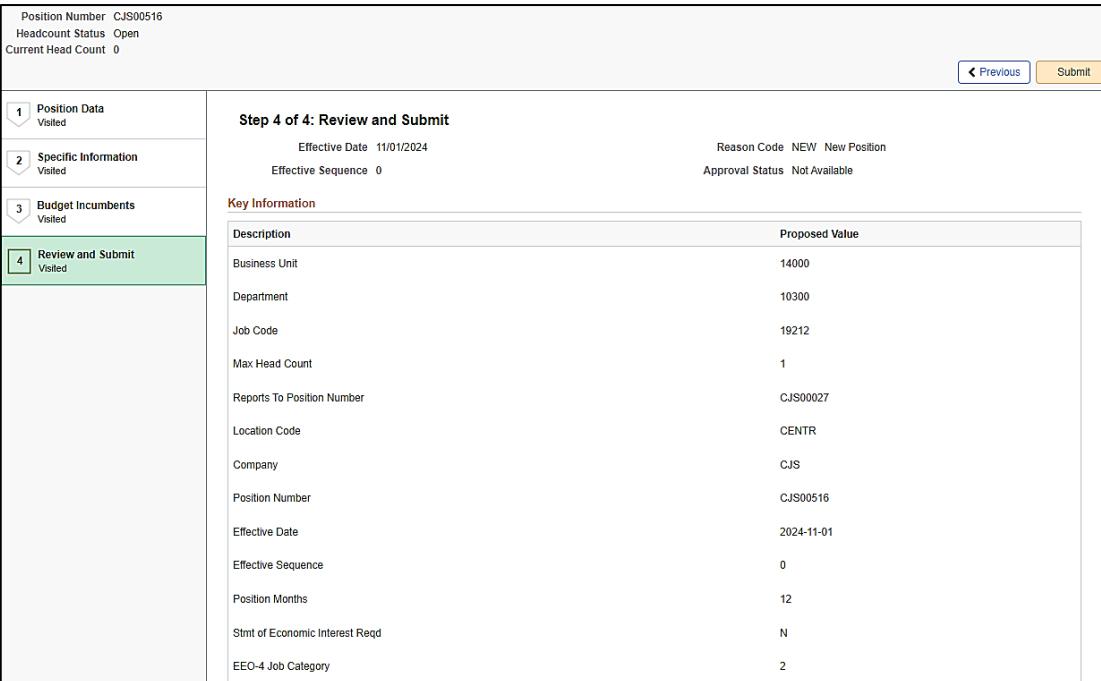
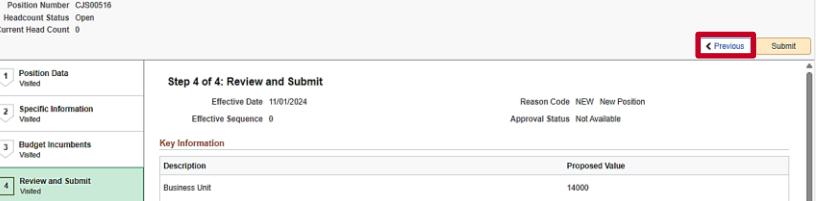
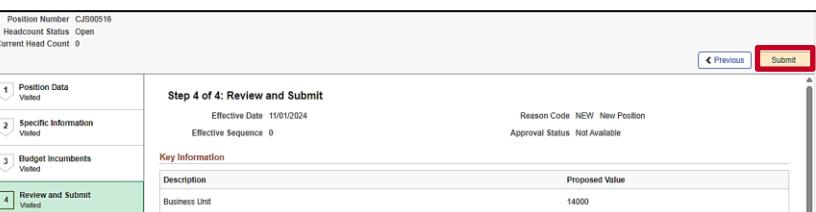
Current Budget																					
Earnings 0.000	Cdn Tax 0.000																				
Deductions 0.000	Total 0.00																				
Tax 0.000																					
Incumbents																					
Update Incumbents <input checked="" type="radio"/> Yes																					
Include Salary Plan/Grade <input checked="" type="radio"/> Yes																					
Force Update for Title Changes <input type="radio"/> No																					
Current Incumbents																					
<table border="1"> <thead> <tr> <th>Name</th> <th>Empl ID</th> <th>Empl Record</th> <th>Full/Part</th> <th>Stnd Hrs/Wk</th> <th>Effective Date</th> <th>Action</th> <th>Action Reason</th> <th>Override Position Data</th> <th>Job Data</th> </tr> </thead> <tbody> <tr> <td>HREE4 01HR0101</td> <td></td> <td></td> <td>0 Full-Time</td> <td>40.00</td> <td>05/07/2020</td> <td>Rehire</td> <td>Rehire</td> <td>N</td> <td>Job Data</td> </tr> </tbody> </table>		Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data	HREE4 01HR0101			0 Full-Time	40.00	05/07/2020	Rehire	Rehire	N	Job Data
Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data												
HREE4 01HR0101			0 Full-Time	40.00	05/07/2020	Rehire	Rehire	N	Job Data												

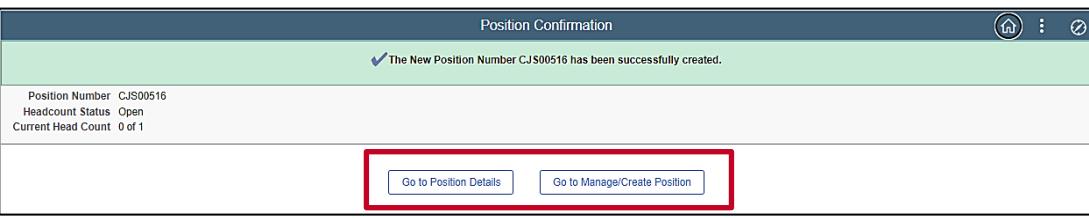
Budget Incumbents fields:

Field	Required	Value	Description	Comments
Current Budget fields			Displays the current budget information for the position	Read-only
Update Incumbents	Y	Yes/No	Indicates whether the incumbents can be updated for the position	Read-only. Defaults to "Yes"

Field	Required	Value	Description	Comments
Include Salary Plan/Grade	Y	Yes/No	Indicates whether to include a Salary Plan/Grade for the position	Read-only. Defaults to "Yes"
Force Update for Title Changes	Y	Yes/No		Not utilized in Cardinal
Current Incumbents			List the current incumbent (employee) linked to the position	Click the Job Data link on the right side of the incumbent data line to go to the current incumbent job data

Step	Action						
8.	<p>Click the Next button in the top right-hand corner of the page after all required reviews and updates are completed for the Budget Incumbents page.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Position Number CJS00516 Headcount Status Open Current Head Count 0 ◀ Previous Next ▶ </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 20%;"> Position Data Visited Specific Information Visited Budget Incumbents Visited Review and Submit </div> <div style="width: 60%;"> <p>Step 3 of 4: Budget Incumbents</p> <p>Effective Date 11/01/2024 Reason Code NEW New Position</p> <p>Effective Sequence 0 Approval Status Not Available</p> <p>Current Budget</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%;">Head Count 0</td> <td style="width: 50%;">Amount 0.000 </td> </tr> <tr> <td colspan="2">Current Budget FTE 0.00</td> </tr> <tr> <td colspan="2">Incumbents</td> </tr> </table> </div> </div> </div>	Head Count 0	Amount 0.000	Current Budget FTE 0.00		Incumbents	
Head Count 0	Amount 0.000						
Current Budget FTE 0.00							
Incumbents							

Step	Action
The Create Position page displays with the Review and Submit Step 4 of 4 displayed.	
	
9.	<p>Review the Summary of Changes section (New Value and Old Value column entries for field(s) updated).</p> <p>This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking the Submit button.</p>
10.	<p>If additional information is required, click the Previous button to navigate back to the applicable step(s).</p> 
11.	<p>Click the Submit button if all updates are accurate.</p> 

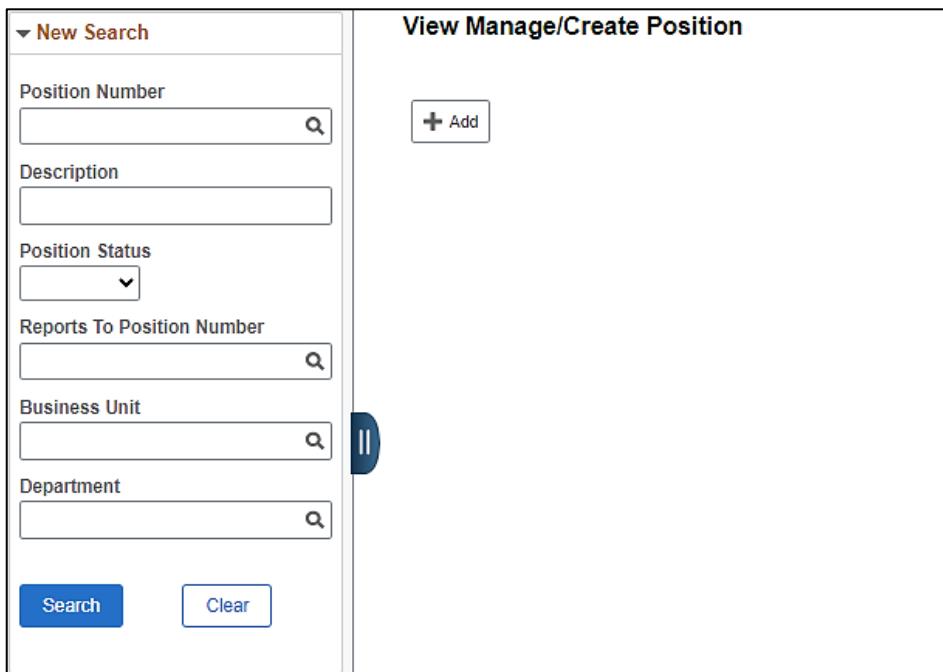
Step	Action
<p>The Position Confirmation page displays.</p>	
	
12.	<p>Click the Go to Position Details button to return and view the updated information for the position or click the Go to Manage/Create Position button to create another position or search for another position and make changes.</p> 
	<p>When creating a new position, or updating the department on an existing position, the Position/Department funding may need to be assigned. For more information on assigning or updating position or department funding, see the Job Aid titled HR351 Position Chartfield Assignment/Update. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
	<p>New departments must be configured by Cardinal PPS prior to being used on a position. When updating a position to a new department, a VCCC ticket (vccc@vita.virginia.gov) will need to be opened. Please be sure to include "Cardinal" in the subject line.</p>

Cloning a Position

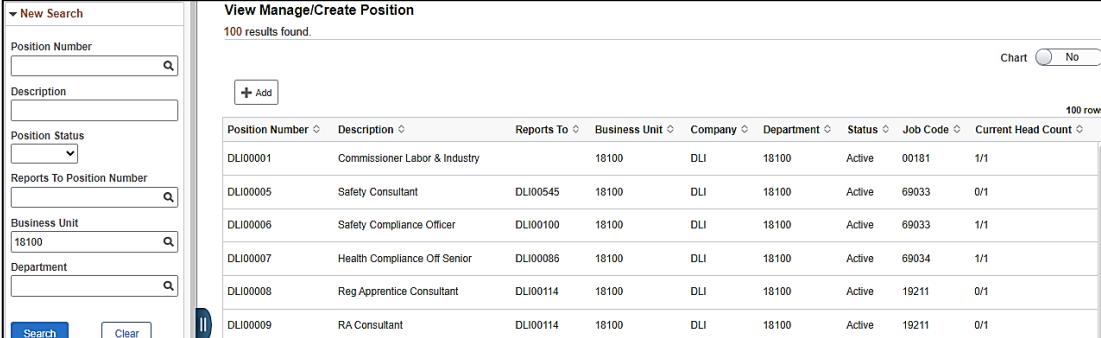
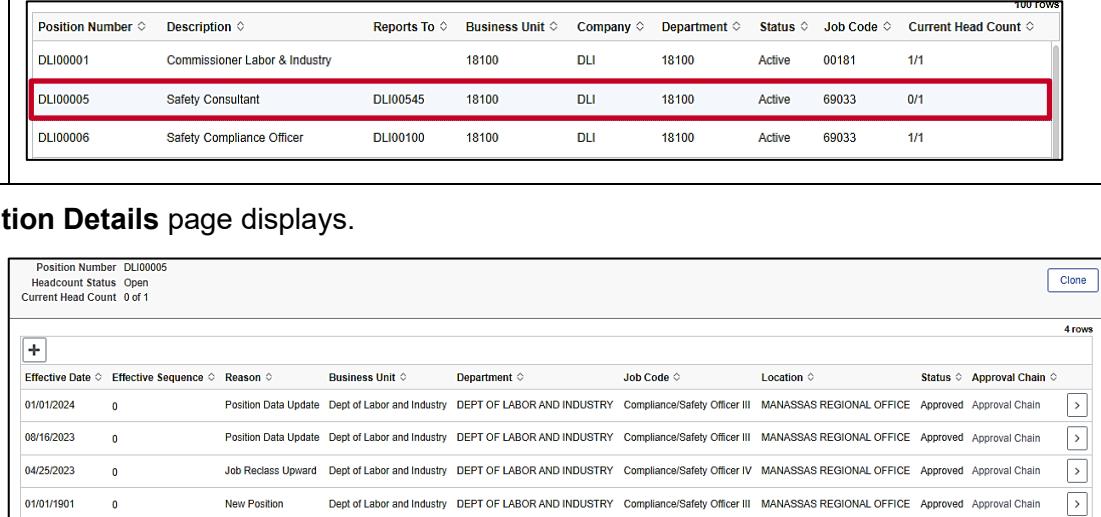
When creating positions that are identical or similar to existing positions, the clone functionality can be used.

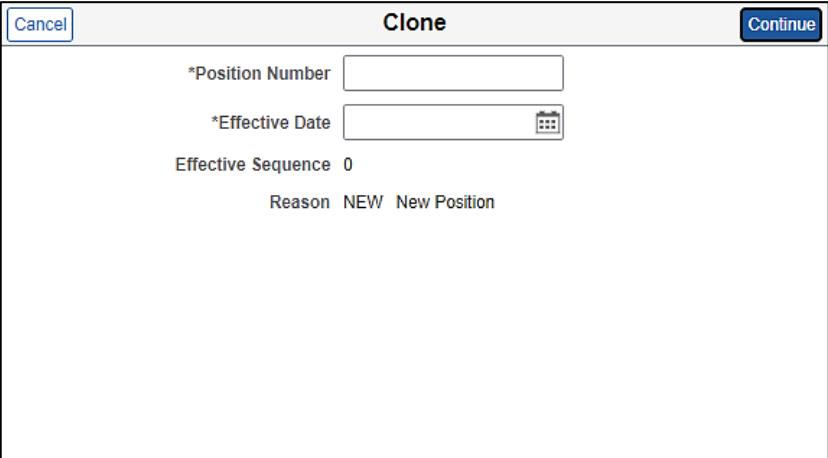
Step	Action
1.	<p>Navigate to the Manage Position page using the following path:</p> <p>NavBar > Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position</p>

The **Manage/Create Position** search page displays.

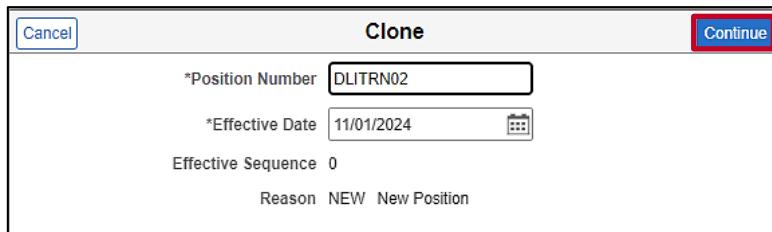


2.	Enter the Position Number for the position to be cloned in the Position Number field.
	
3.	Click the Search button.
	

Step	Action
The Manage/Create Position page refreshes and the search results display.	
	
4.	Select the applicable position by clicking anywhere in the corresponding row.
	
5.	Click the Clone button.
	

Step	Action
The Clone page displays in a pop-up window.	
	 <p>The screenshot shows the 'Clone' page with the following fields:</p> <ul style="list-style-type: none"> Cancel button (top left) Clone button (top right) *Position Number input field (with a red border) *Effective Date input field (with a red border) with a calendar icon Effective Sequence 0 Reason NEW New Position
6.	Enter the new Position Number in the Position Number field.
7.	Enter the effective date for the new position in the Effective Date field.
	<p>The Effective Date field must be updated to the applicable effective date for the new position as needed using the Calendar icon and must be:</p> <ol style="list-style-type: none"> Greater than or equal to the effective date of the position's Job Code (which is maintained by DHRM) <p>AND</p> <ol style="list-style-type: none"> Less than or equal to the effective date of any employee job transaction(s) <p>For further information on effective dating, refer to the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>

Step	Action
8.	Click the Continue button.



Clone

*Position Number

*Effective Date

Effective Sequence 0

Reason NEW New Position

Cancel Continue

The **Clone Position** page displays with the **Position Data Step 1 of 4** displayed by default.



Position Number DLITRN02
Headcount Status Open
Current Head Count 0

Step 1 of 4: Position Data

Effective Date 11/01/2024
Effective Sequence 0
Reason Code NEW

Review Date
*Position Months

Stmt of Economic Interest Reqd Yes No
VPA Covered Yes No

Position Information

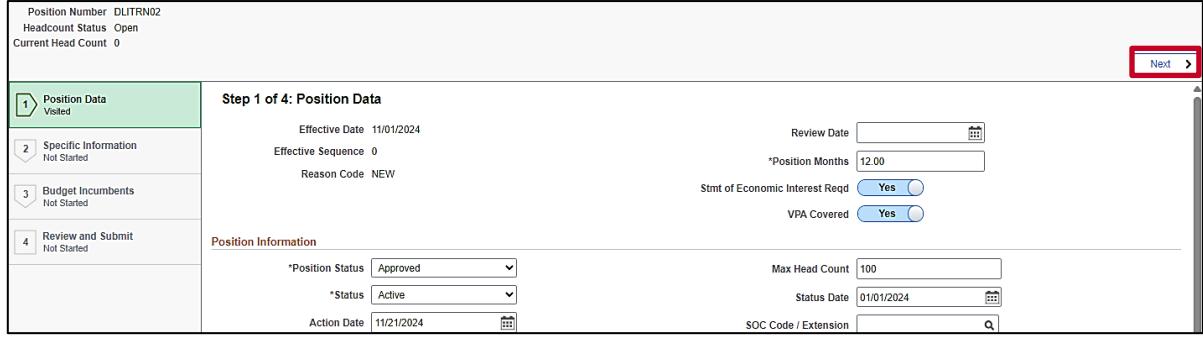
*Position Status
*Status
Action Date

Max Head Count
Status Date
SOC Code / Extension

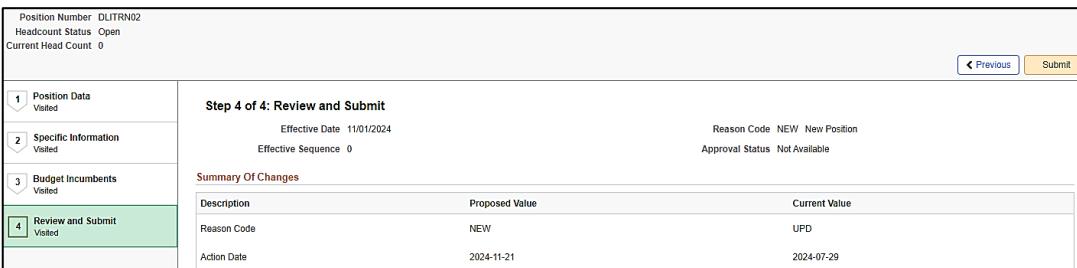
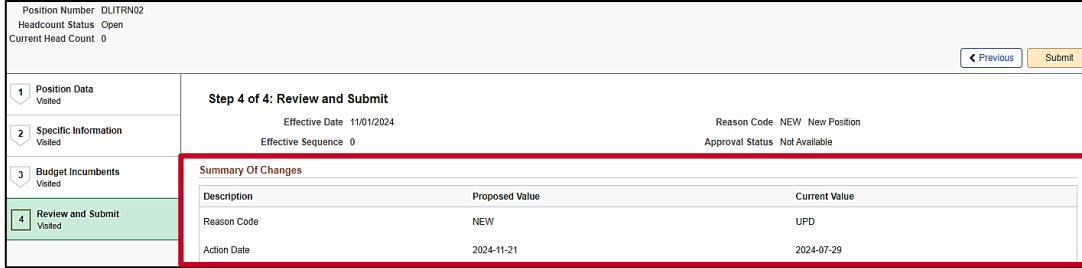
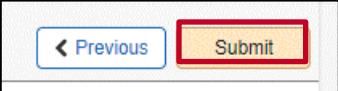
Next >



The information for the position defaults based on the position from which it was cloned. The following link can be used to navigate to the screenshots and tables found in the **Creating a Position** section of this Job Aid. This section of the Job Aid provides a brief description, important information, and dependencies (as applicable) for each field: [Position Data Header Fields](#).

9.	Click the Next button to navigate through Steps 1 to 4, reviewing all information and completing all necessary updates on the various position pages.
	 <p>Position Number DLITRN02 Headcount Status Open Current Head Count 0</p> <p>Step 1 of 4: Position Data</p> <p>Effective Date 11/01/2024 Effective Sequence 0 Reason Code NEW</p> <p>Review Date <input type="text"/> *Position Months <input type="text" value="12.00"/></p> <p>Stmt of Economic Interest Reqd <input checked="" type="radio"/> Yes <input type="radio"/> No VPA Covered <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Position Information</p> <p>*Position Status <input type="text" value="Approved"/> *Status <input type="text" value="Active"/> Action Date <input type="text" value="11/21/2024"/> <input type="button" value="Calendar"/></p> <p>Max Head Count <input type="text" value="100"/> Status Date <input type="text" value="01/01/2024"/> <input type="button" value="Calendar"/> SOC Code / Extension <input type="text"/> <input type="button" value="Search"/></p> <p>Next ></p>

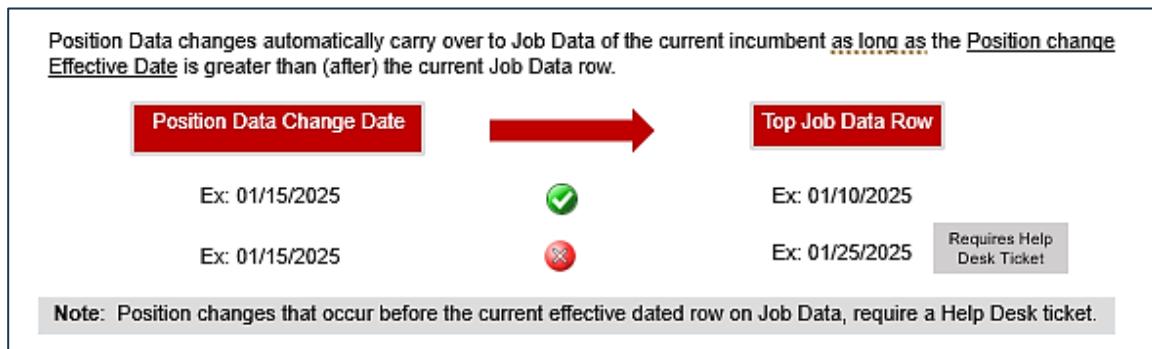


Step	Action
<p>The Create Position page displays with the Review and Submit Step 4 of 4 displayed.</p> 	
10.	<p>Review Summary of Changes section (Proposed Value and Current Value column entries for field(s) updated).</p> 
	<p>This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking the Submit button.</p>
11.	<p>If additional information is required, click the Previous button, and navigate back to the applicable step(s).</p> 
12.	<p>Click the Submit button after verifying all information.</p> 

Step	Action
<p>The Position Confirmation page displays.</p> 	
	<p>Note: Users can click the Go to Position Details button to return and view the updated information for the position or click the Go to Manage/Create Position button to create another position or search for another position and make changes.</p> <p>Note: When cloning a new position, Position/Department funding may need to be assigned. For more information on assigning or updating position or department funding, see the Job Aid titled HR351 Position Chartfield Assignment/Update. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p> <p>Note: New departments must be configured by Cardinal PPS prior to being used for a position. When updating a position to a new department, a VCCC ticket (vccc@vita.virginia.gov) will need to be opened. Please be sure to include "Cardinal" in the subject line.</p>

Updating Position Data When an Incumbent Exists

Before making position changes, check the employee's job data to determine the date of the top row. The effective date of the position change must be after the highest dated job data row for the change to properly flow over to the employee's job data. In the image below, the top row will flow to the employee's job without requiring a help desk ticket. The second row requires a help desk ticket to be submitted to make the change. It is important to review the effective date of an employee's highest job data row.



Step	Action
1.	<p>Navigate to the Manage Position page using the following path:</p> <p>NavBar > Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position</p>

The **Manage/Create Position** search page displays.

New Search

Position Number

Description

Position Status

Reports To Position Number

Business Unit

Department

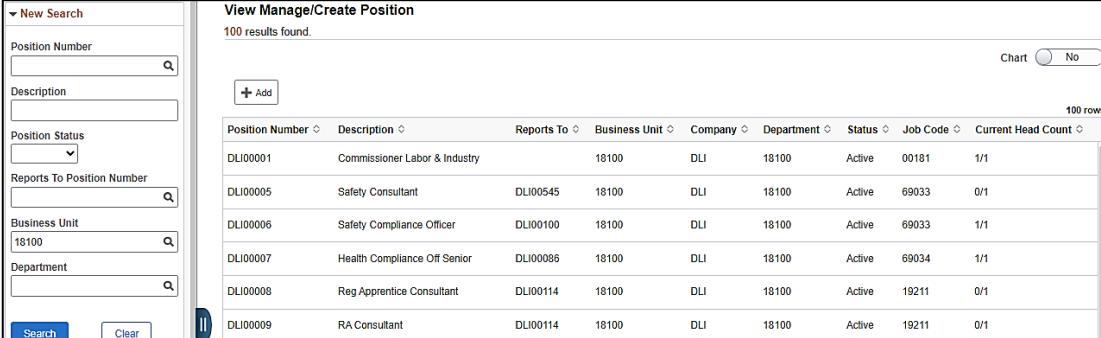
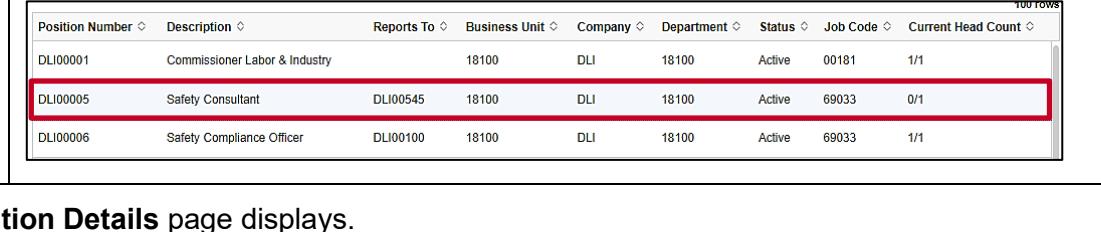
Search Clear

View Manage/Create Position

+ Add

Step	Action
	Users will only see approved positions granted by their security access.
2.	Search for the applicable position using the fields on the left sidebar. <div data-bbox="290 502 1269 1199" style="border: 1px solid #ccc; padding: 10px;"> <div style="display: flex; justify-content: space-between;"> <div style="flex: 1;"> <p>▼ New Search</p> <p>Position Number <input type="text"/> </p> <p>Description <input type="text"/></p> <p>Position Status <input type="button" value="▼"/></p> <p>Reports To Position Number <input type="text"/> </p> <p>Business Unit <input type="text"/> </p> <p>Department <input type="text"/> </p> </div> <div style="flex: 1; padding-left: 20px;"> <p>View Manage/Create Position</p> <p> Add</p> </div> </div> </div>
	All positions within the applicable parameter display if the Business Unit or Department fields are entered. If the Position Number is unknown, select “Approved” using the Position Status dropdown button to retrieve a list of all accessible positions within the selected search parameters.
3.	Click the Search button. <div data-bbox="295 1480 540 1543" style="border: 1px solid #ccc; padding: 5px; display: flex; justify-content: space-around;"> Search Clear </div>



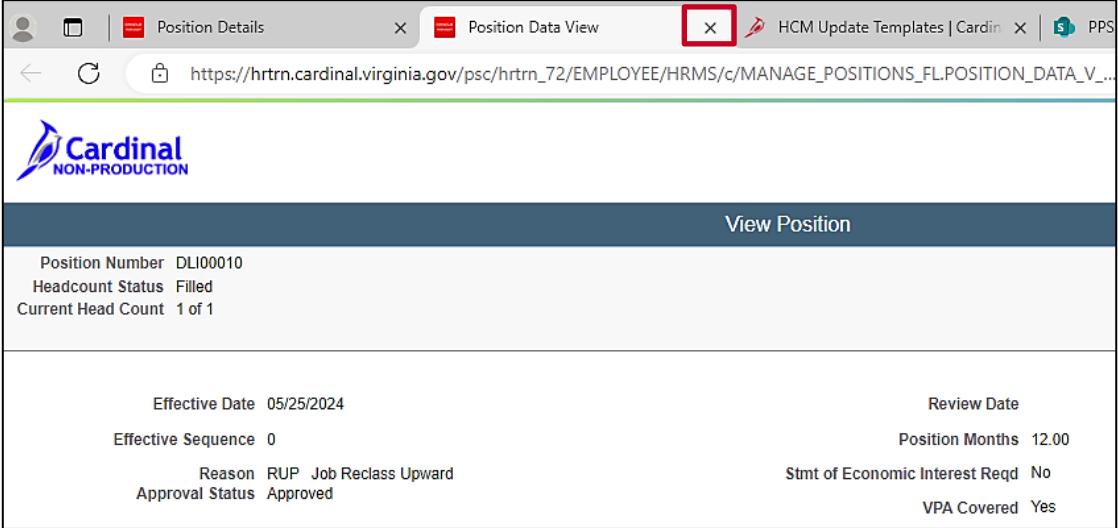
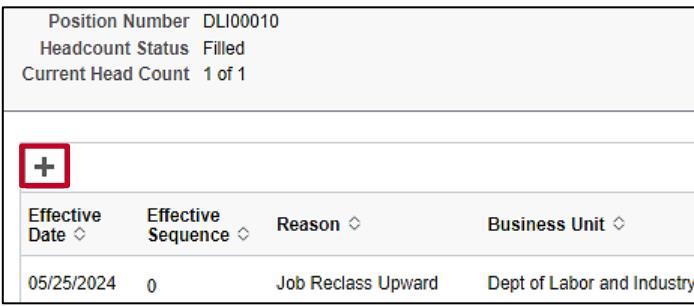
Step	Action
<p>The Manage/Create Position page refreshes and the search results display.</p>  <p>The screenshot shows the 'View Manage/Create Position' page with a search bar and filter options on the left. The main area displays a table of 100 results with columns for Position Number, Description, Reports To, Business Unit, Company, Department, Status, Job Code, and Current Head Count. The table includes a header row and 10 data rows. The first data row is highlighted with a red border.</p>	
4.	Select the applicable position by clicking anywhere in the corresponding row.
 <p>The screenshot shows the 'Position Details' page with a table of position history. The table has columns for Effective Date, Effective Sequence, Reason, Business Unit, Department, Job Code, Location, Status, and Approval Chain. The table includes a header row and 4 data rows. The fourth data row, which corresponds to the selected position from the previous step, has an expand icon (a right-pointing arrow) at the end of the row.</p>	
<p>The Position Details page displays.</p>  <p>The screenshot shows the 'Position Details' page with a table of position history. The table has columns for Effective Date, Effective Sequence, Reason, Business Unit, Department, Job Code, Location, Status, and Approval Chain. The table includes a header row and 4 data rows. The fourth data row, which corresponds to the selected position from the previous step, has an expand icon (a right-pointing arrow) at the end of the row.</p>	
5.	Click the Expand icon (>) at the end of the row.
 <p>The screenshot shows the 'Position Details' page with a table of position history. The table has columns for Effective Date, Effective Sequence, Reason, Business Unit, Department, Job Code, Location, Status, and Approval Chain. The table includes a header row and 4 data rows. The fourth data row, which corresponds to the selected position from the previous step, has an expand icon (a right-pointing arrow) at the end of the row. The expand icon is highlighted with a red box.</p>	

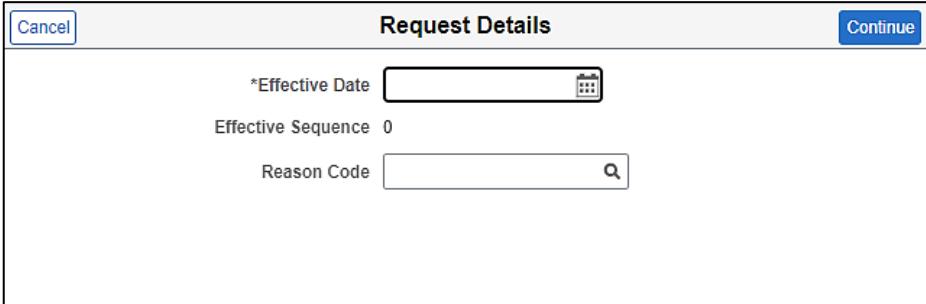
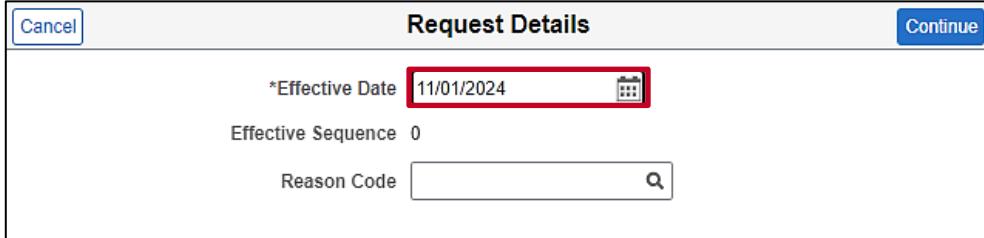
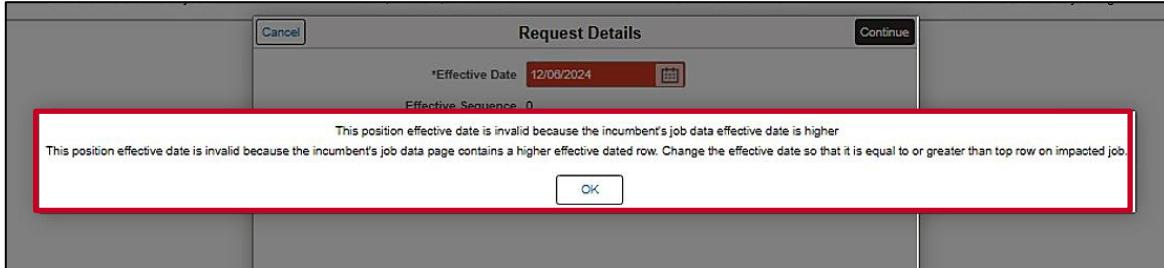


Step	Action																										
The View Position page displays the details of the selected position in read-only format.																											
<div><p>Position Number DLI00010 Headcount Status Filled Current Head Count 1 of 1</p><p>Effective Date 05/25/2024 Review Date Effective Sequence 0 Position Months 12.00 Reason RUP Job Reclass Upward Stmt of Economic Interest No Approval Status Approved Reqd VPA Covered Yes</p><p>Position Information</p><table><tbody><tr><td>Position Status Approved</td><td>Max Head Count 1</td></tr><tr><td>Status Active</td><td>Status Date 09/21/2022</td></tr><tr><td>Action Date 05/13/2024</td><td>SOC Code / Extension 29-9011</td></tr><tr><td>Key Position No</td><td>Job Sharing Permitted No</td></tr><tr><td>Budgeted Position Yes</td><td>Available for Telework Yes</td></tr><tr><td>Confidential Position No</td><td>EEO-4 Job Category Professionals</td></tr><tr><td>Alternate Work Schedule Yes</td><td>Workers' Comp Code 8720</td></tr></tbody></table></div>		Position Status Approved	Max Head Count 1	Status Active	Status Date 09/21/2022	Action Date 05/13/2024	SOC Code / Extension 29-9011	Key Position No	Job Sharing Permitted No	Budgeted Position Yes	Available for Telework Yes	Confidential Position No	EEO-4 Job Category Professionals	Alternate Work Schedule Yes	Workers' Comp Code 8720												
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6.	Scroll down to the Budget and Incumbents section.																										
<div><p>Education and Government</p><p>Budget and Incumbents</p><table><tbody><tr><td>Earnings 0.000</td><td>Cdn Tax 0.000</td></tr><tr><td>Deductions 0.000</td><td>Total 0.00</td></tr><tr><td>Tax 0.000</td><td></td></tr></tbody></table><p>Update Incumbents Yes Include Salary Plan/Grade Yes Force Update for Title Yes Changes</p><p>Current Incumbents</p><table><thead><tr><th>Name</th><th>Empl ID</th><th>Empl Record</th><th>Full/Part</th><th>Stnd Hrs/Wk</th><th>Effective Date</th><th>Action</th><th>Action Reason</th><th>Override Position Data</th><th>Job Data</th></tr></thead><tbody><tr><td>JOHN DOE</td><td></td><td>0</td><td>Full-Time</td><td>40.00</td><td>06/25/2024</td><td>Pay Rate Change</td><td>New KSAs</td><td>N</td><td>Job Data</td></tr></tbody></table><p>1 row</p><p>CI Exceptions Summary of Changes Attachments</p></div>		Earnings 0.000	Cdn Tax 0.000	Deductions 0.000	Total 0.00	Tax 0.000		Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data	JOHN DOE		0	Full-Time	40.00	06/25/2024	Pay Rate Change	New KSAs	N	Job Data
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JOHN DOE		0	Full-Time	40.00	06/25/2024	Pay Rate Change	New KSAs	N	Job Data																		

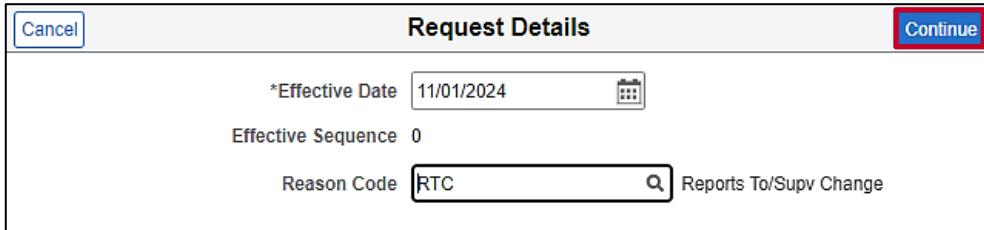


Step	Action																										
7.	<p>The job data of the current employee in the position is displayed here. Review the following fields in the Current Incumbents section.</p> <ol style="list-style-type: none">Name – employee's nameEmpl ID – employee's identification numberEmpl Record – employee's record associated with the positionFull/Part – identifies if the person in the position is full-time or part-timeStnd Hrs/Wrk – number of hours per week the employee is scheduled to workEffective Date – indicates the highest effective dated row on this employee's job data <p>Note: Any date after this date can be used as the Effective Date for the Position Change.</p> <ol style="list-style-type: none">Action – indicates the last action on the highest effective dated job data row for the employeeAction Reason – indicates the reason associated with the action on the highest effective dated job data row <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"><p>► Education and Government</p><p>Budget and Incumbents</p><table><tr><td>Earnings 0.000</td><td>Cdn Tax 0.000</td></tr><tr><td>Deductions 0.000</td><td>Total 0.00</td></tr><tr><td>Tax 0.000</td><td></td></tr></table><p>Update Incumbents Yes</p><p>Include Salary Plan/Grade Yes</p><p>Force Update for Title Changes Yes</p><p>Current Incumbents</p><table><thead><tr><th>Name</th><th>Empl ID</th><th>Empl Record</th><th>Full/Part</th><th>Stnd Hrs/Wk</th><th>Effective Date</th><th>Action</th><th>Action Reason</th><th>Override Position Data</th><th>Job Data</th></tr></thead><tbody><tr><td>JOHN DOE</td><td></td><td></td><td>0 Full-Time</td><td>40.00</td><td>06/25/2024</td><td>Pay Rate Change</td><td>New KSAs</td><td>N</td><td>Job Data</td></tr></tbody></table><p>1 row</p><p>CI Exceptions</p><p>► Summary of Changes</p><p>► Attachments</p></div>	Earnings 0.000	Cdn Tax 0.000	Deductions 0.000	Total 0.00	Tax 0.000		Name	Empl ID	Empl Record	Full/Part	Stnd Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data	JOHN DOE			0 Full-Time	40.00	06/25/2024	Pay Rate Change	New KSAs	N	Job Data
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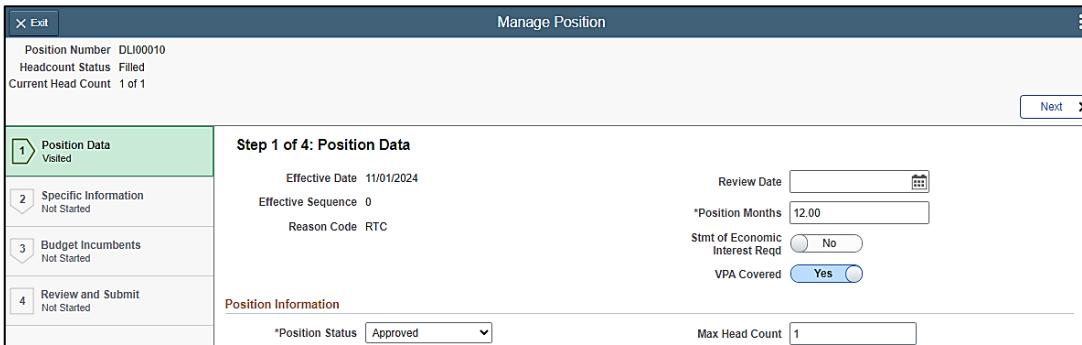
Step	Action
8.	<p>Click the Close (X) icon for the Position Data View tab to close out this tab.</p> 
9.	<p>The Position Details page displays.</p>  <p>Click the Insert a New Row icon (+) to create a new effective dated row in order to make a change to the position.</p> 

Step	Action
The Request Details page displays in a pop-up window.	
	
10.	Enter/select the applicable date for the position change in the Effective Date field.
	
	<p>If the position change precedes the highest effective dated row on the incumbent's job an error message will display in a pop-up window. Change the effective date as applicable.</p> 
11.	Click the Reason Code Look Up icon and select the applicable Reason Code for the position change.
	

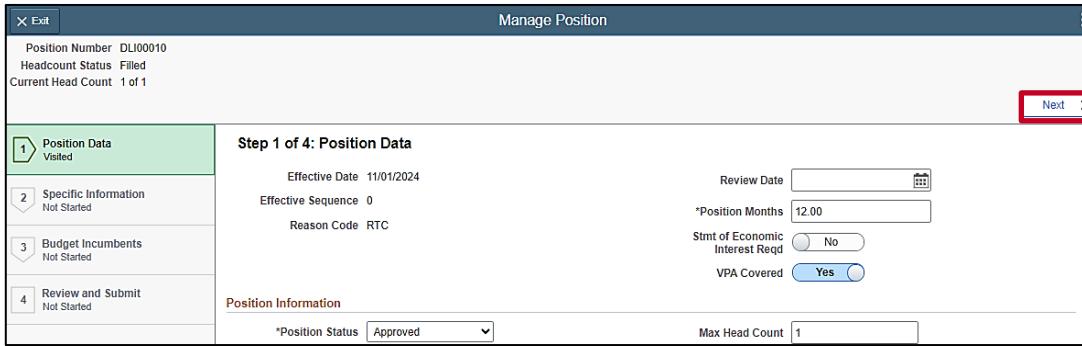
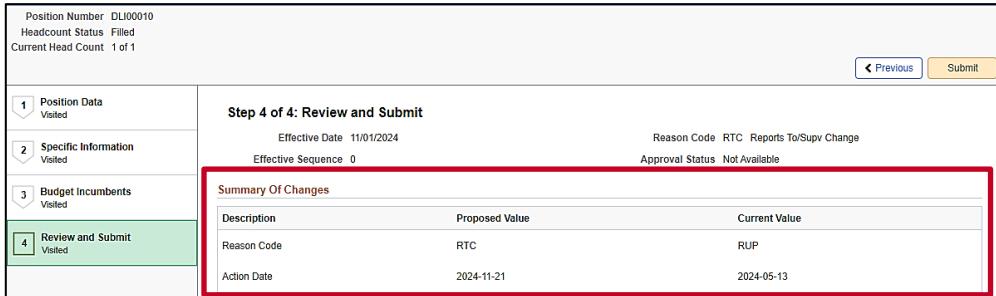
Step	Action
12.	Click the Continue button.



The **Manage Position** page displays with the **Position Data** Step 1 of 4 displayed by default.

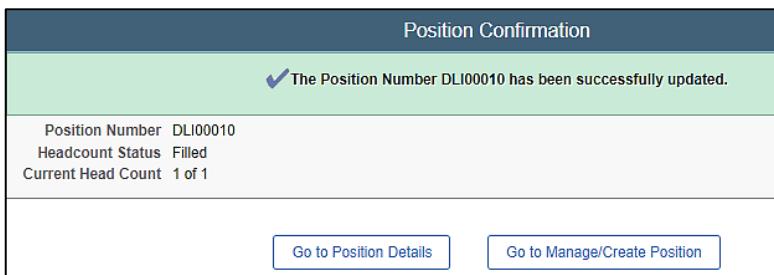


	<p>When updating the department of an existing position, Position/Department funding may need to be assigned for the new position/department combination. For more information on assigning or updating position or department funding, see the Job Aid titled HR351 Position Chartfield Assignment/Update. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p> <p>The following link can be used to navigate to the screenshots and tables found in the Creating a Position section of this Job Aid. This section of the Job Aid provides a brief description, important information, and dependencies (as applicable) for each field: Position Data Header Fields.</p>
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Step	Action
13.	<p>Click the Next button to navigate through Steps 1 to 4, reviewing all information and completing all necessary updates on the various position pages.</p> 
14.	<p>The Create Position page displays with the Review and Submit Step 4 of 4 displayed.</p>  <p>Review Summary of Changes section (Proposed Value and Current Value column entries for field updated).</p>  <p>This step provides an opportunity to closely review position data and proper entry. Validate against position classification/audit paperwork prior to clicking the Submit button.</p>

Step	Action
15	If additional information is required, click the Previous button, and navigate back to the applicable step(s).  A rectangular button panel containing two buttons: a blue 'Previous' button with white text and a yellow 'Submit' button with black text.
16.	Click the Submit button after verifying all information.  A rectangular button panel containing two buttons: a blue 'Previous' button with white text and a yellow 'Submit' button with black text, which is highlighted with a red border.

The **Position Confirmation** page displays.

A screenshot of a 'Position Confirmation' page. The title 'Position Confirmation' is at the top. Below it is a green success message: '✓ The Position Number DLI00010 has been successfully updated.' Underneath the message are three pieces of information: 'Position Number DLI00010', 'Headcount Status Filled', and 'Current Head Count 1 of 1'. At the bottom are two blue buttons: 'Go to Position Details' and 'Go to Manage/Create Position'.