Updating an Employee Expense Profile Overview

An employee profile must be entered in Cardinal before:

- An employee can be granted access to Cardinal
- An employee's travel or expense transactions can be entered or reimbursed

The employee profile contains the employee's name, address, employee status, Agency Business Unit, Department, supervisor, cash advance level, and payment information (such as EDI bank account information).

Employee Profiles are added/updated by an Agency HR Administrator in Cardinal HCM and these additions/updates are synced to Cardinal Financials. Limited updates to the Employee Profile pages are permitted by Agency users with the Employee Profile Sync Maintenance role.

Adding a Proxy

In order to have expense transactions entered, every employee must have at least one proxy (authorized user) set up. After creating the employee profile, be sure to add a proxy or proxies for every employee profile created. For more detailed information about how to authorize a proxy, see the job aid titled **AP315 Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

The Cardinal Remittance Electronic Data Interchange (REDI) Authentication Interface process verifies all newly created employee accounts in the REDI Virginia system.

Banking information is interfaced daily from the Cardinal Human Capital Management (HCM) system. The DOA EDI Coordinators have access to enter this information when necessary (e.g., when HCM update has not yet been processed).

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
9/1/2026	Updated to reflect the Cardinal system changes.
3/1/2025	Updated the screenshots of the Search pages (Section 3, after Step 1; Section 4, after Step 1). Added reference information to the Overview of the Cardinal FIN Search Pages Job Aid.

Employee Working for Multiple Cardinal Agencies

If the employee is working for more than one state Agency, a profile must be created in HCM for each Agency from which the employee is requesting a reimbursement of expenses:

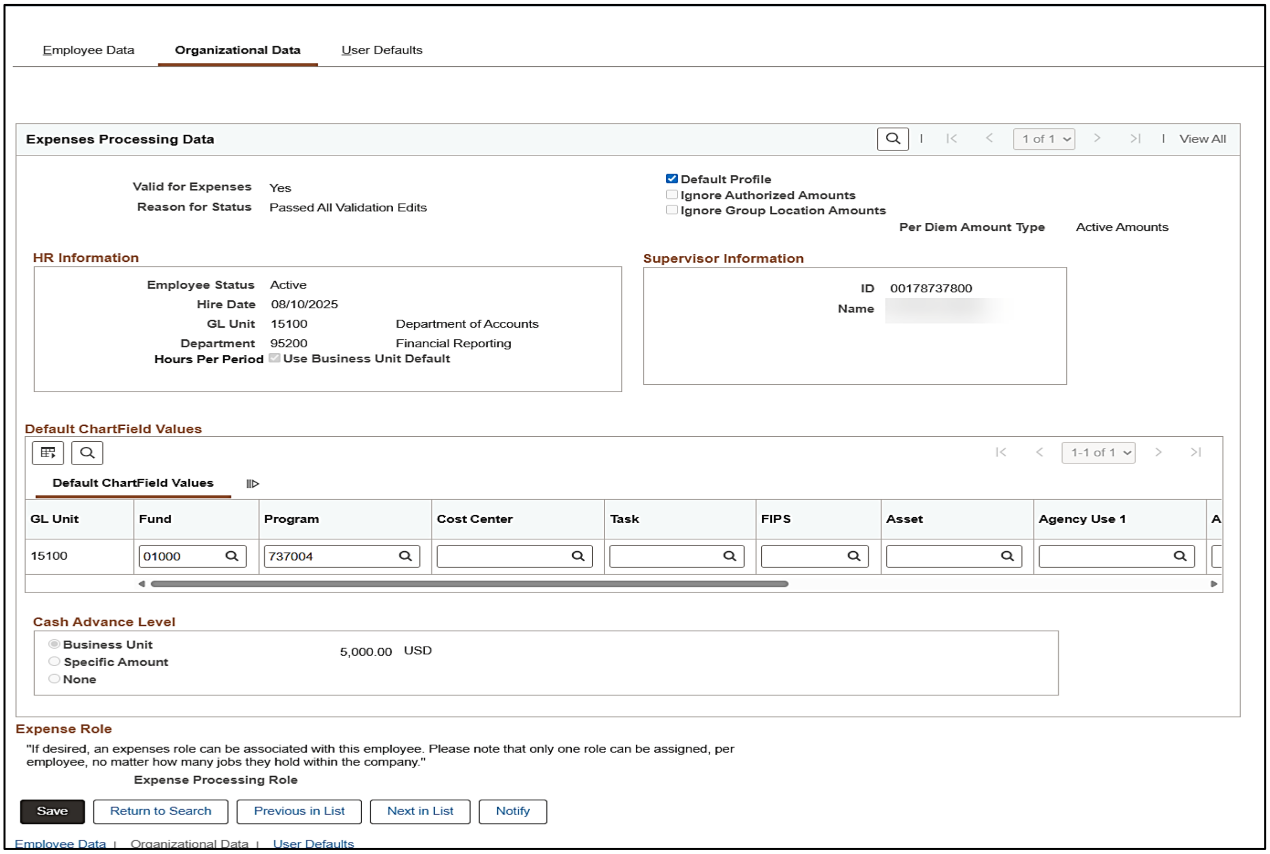
1. Employees working in multiple Agencies will be set up with one Employee Profile associated to multiple Agency records reflecting each job (i.e., Employee Record Number).
2. Employee IDs are generated in Cardinal HCM, and each employee will only have one Cardinal Employee ID.

Only one Employee Record Number can be set as “Default”. and Expense transactions (Expenses, Travel Authorizations, and Cash Advances) can only be created against the record marked as “Default”. When an Agency needs to submit transactions for a different Employee Record Number (job) other than the one marked as “Default”, the **Default** checkbox option on the Employee Profile must be updated accordingly before creating the transactions.

The screenshot below highlights the key changes from HCM impacts to the **Organizational Data** page for the Employee Profile:

- Multiple Employee Records.
- **Default Profile** checkbox option (can be updated to the record of expense transaction).
- HR and Supervisor information are synced from HCM and therefore are grayed out. Supervisor information is based on the “Reports To” from HCM and cannot be modified.
- Default ChartField Values can be updated as needed.

Updating an Employee Profile Overview



If the Employee Profile already exists, there are various reasons why it may need to be updated. Edits to the Employee Profile for the following three scenarios must be made by an HR Administrator in Cardinal HCM:

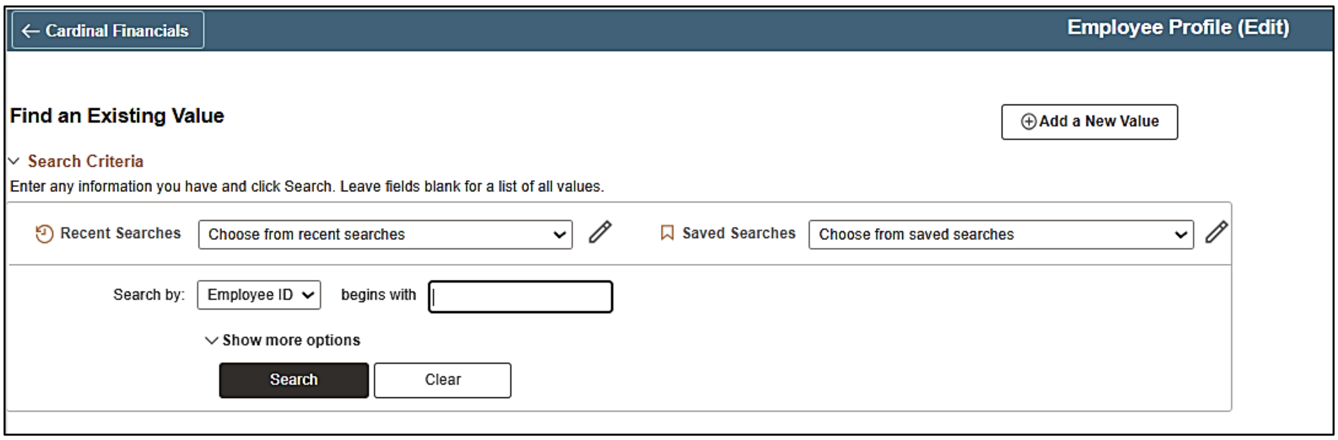
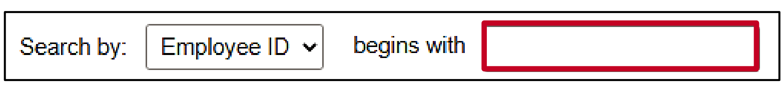
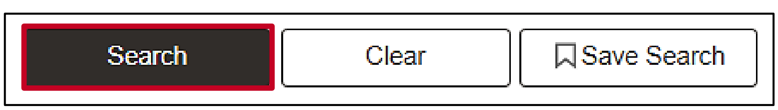
- Employee works for the Agency and requires changes (e.g., moves to another Department, assigned to a new supervisor, etc.)
- Employee moves from one state Agency to another state Agency
- Employee leaves the Agency and their status needs to be updated to terminated

The following edits to the Employee Profile are made by an employee with the Employee Profile Sync Maintenance role for the Agency:

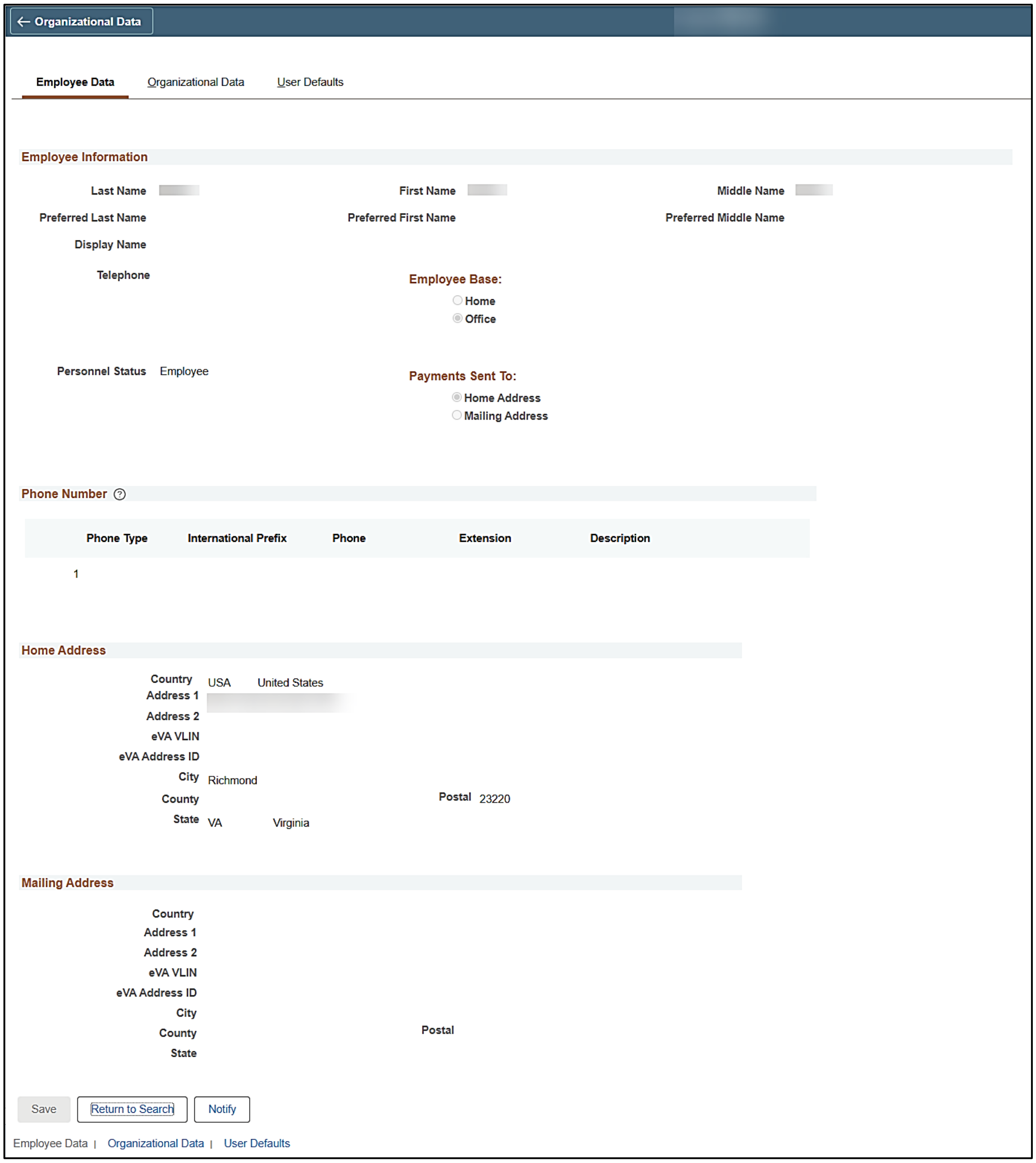
- Updating the **Default ChartField Values** section on the **Employee Profile Organizational Data** page
- Updating information on the **User Defaults** page
- Changing the **Default Profile** checkbox option for employees with multiple records so that the expenses can be submitted by the related Agency

Updating the Default ChartField Values and Users Defaults

The **Default ChartField Values** section is updated on the **Employee Profile Organization Data** page and information may also be updated on the **User Defaults** page. This section of the Job Aid will walk through the steps to make the applicable updates.

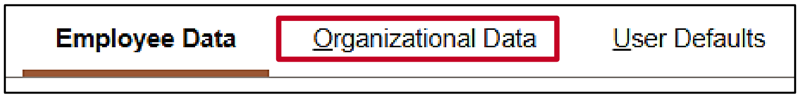
Step	Action
1.	Navigate to the **Employee Profile (Edit)** page using the following path: **NavBar > Menu > Travel and Expenses > Manage Employee Information > Update Employee Detail**
The **Employee Profile (Edit) Find and Existing Value Search** page displays.  	
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Employee ID** field. 
3.	Click the **Search** button. 

Step	Action
The **Employee Profile** page displays with the **Employee Data** tab displayed by default.	

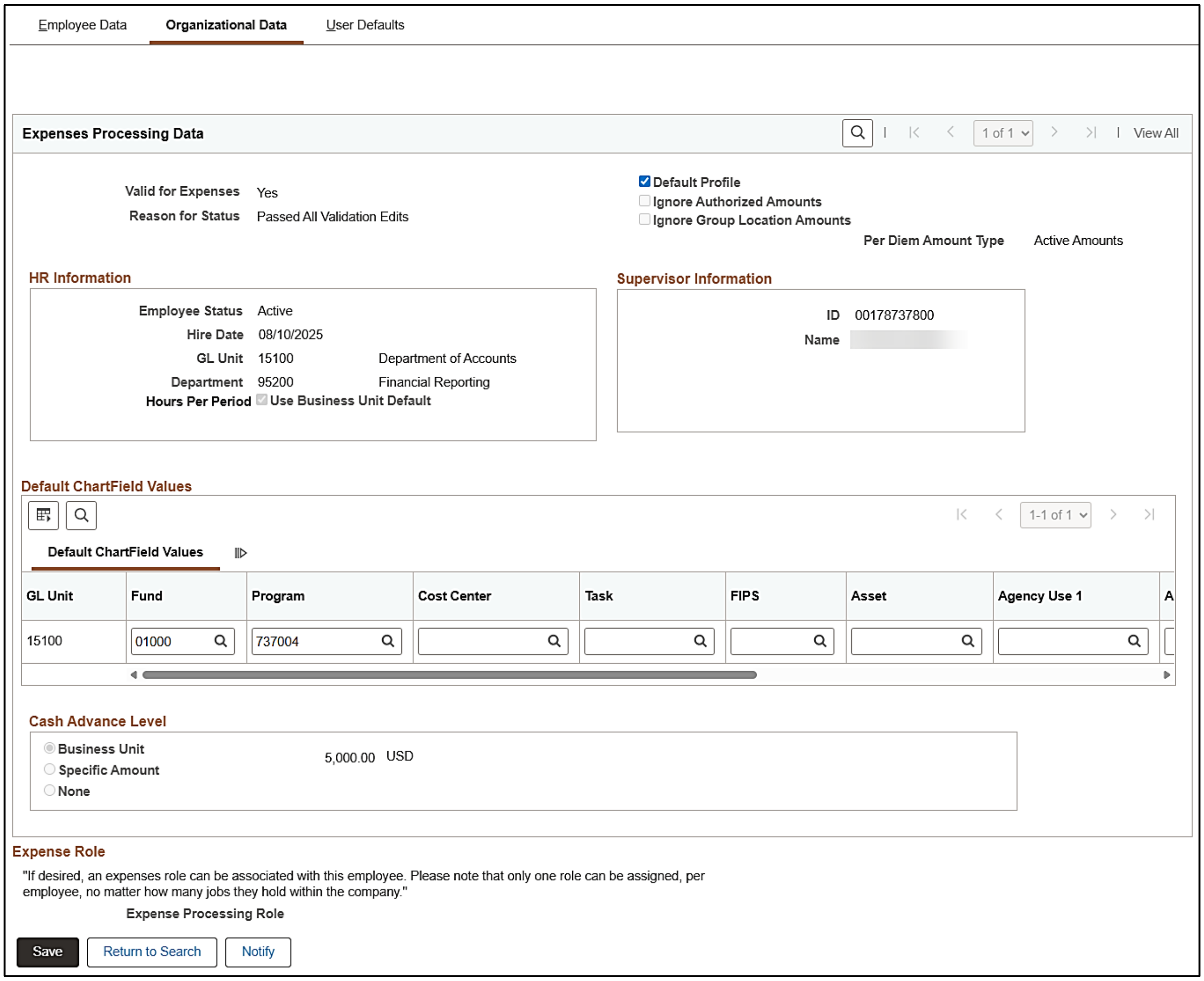


	The **Employee Data** page displays the employee's address which is synced from Cardinal HCM from the Personal Data information for the employee. If this information is incorrect, work with an Agency HR Administrator to have it updated in Cardinal HCM which will sync this information on the Employee Profile in Cardinal Financials.

Step	Action
4.	Click the **Organizational Data** tab.

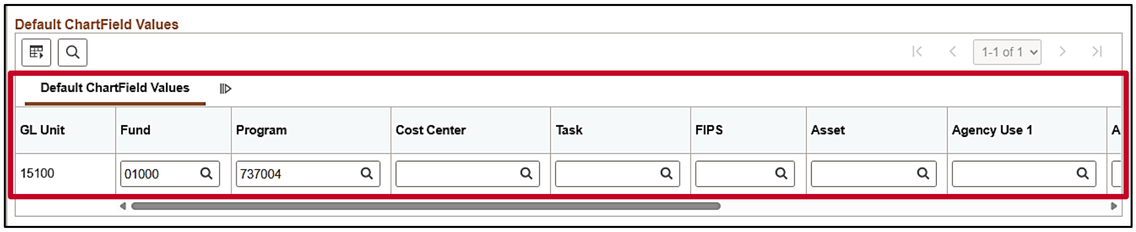


The **Organizational Data** page displays.

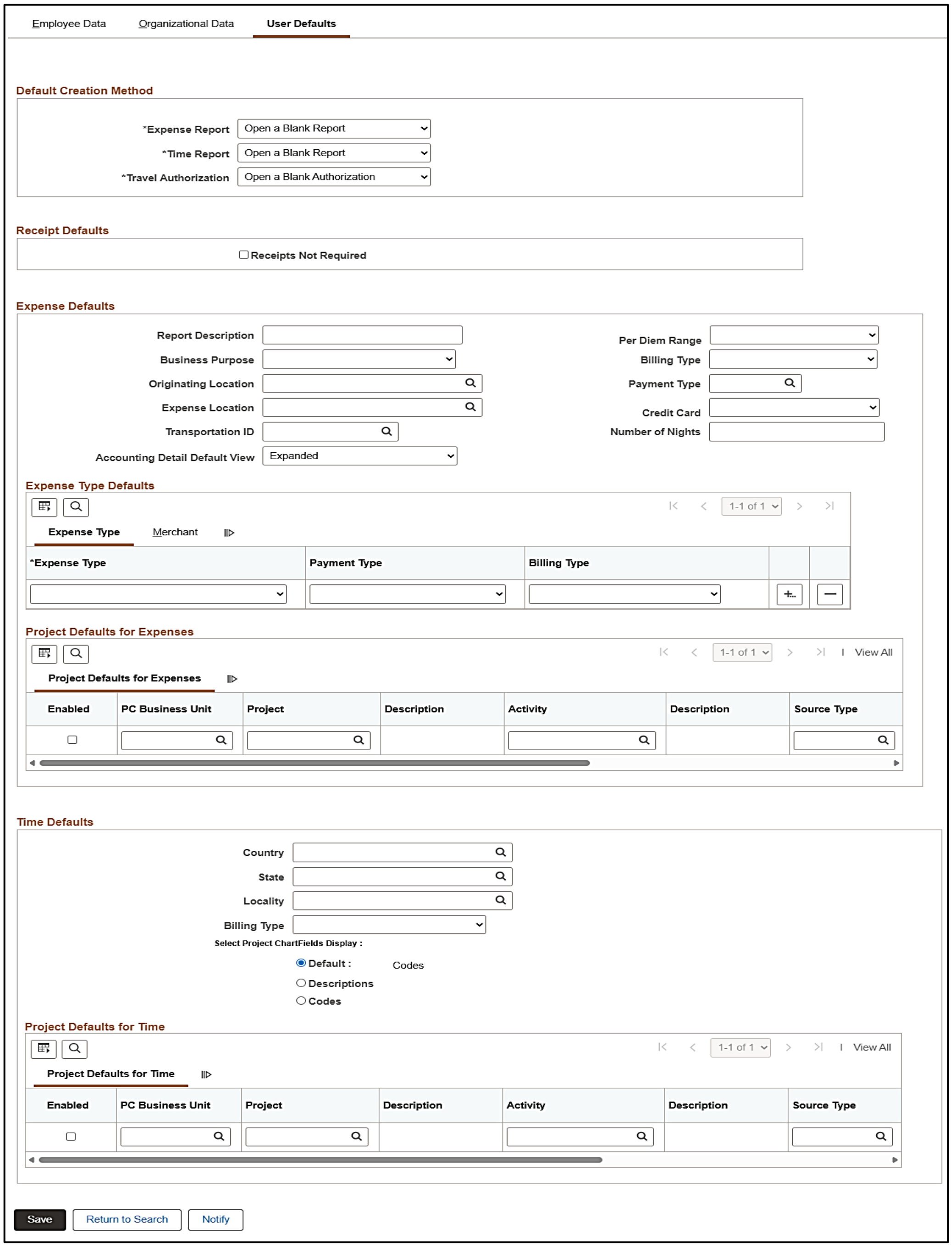


Review the data in the **HR Information** section which is synced from Cardinal HCM to verify accuracy.

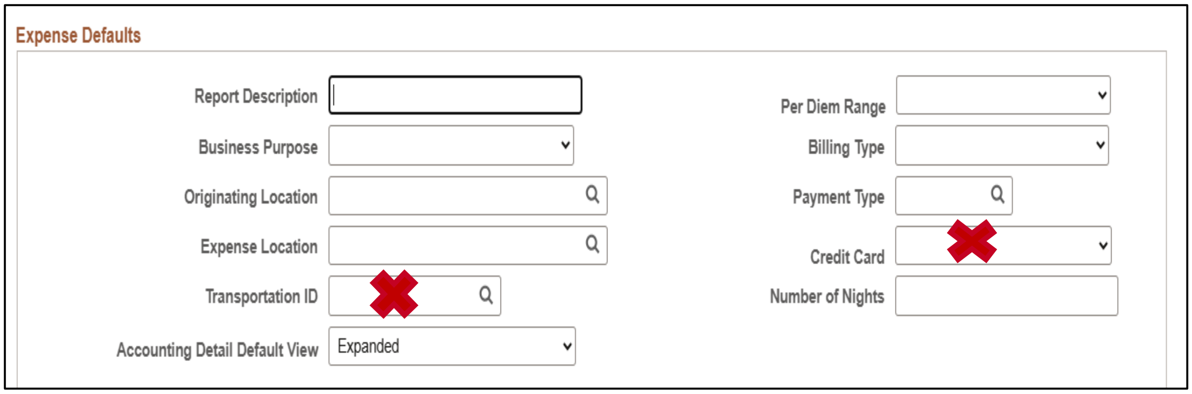
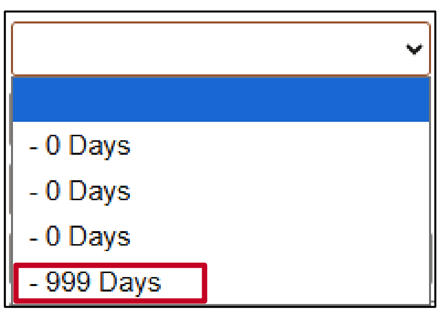
If anything is incorrect, work with an Agency HR Administrator to make the appropriate updates in HCM and those changes will sync and update the employee profile.

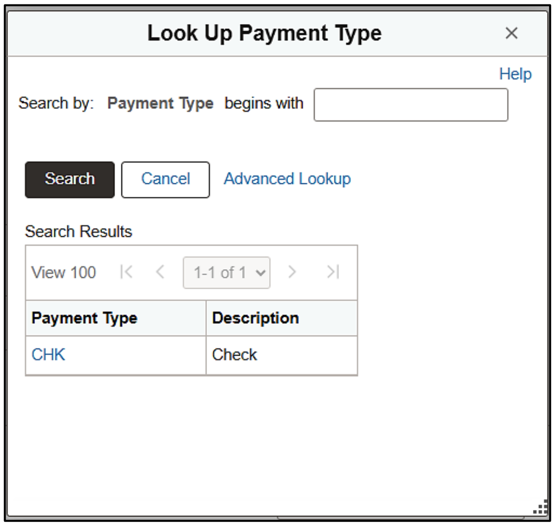
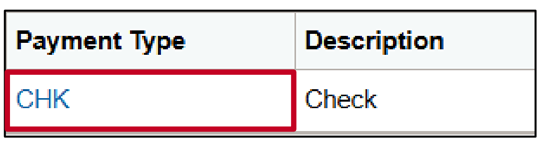
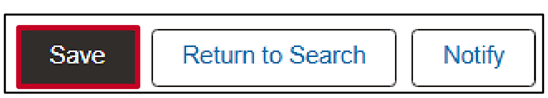
Step	Action
5.	Review and update the default ChartField Values in the **Default ChartField Values** section if necessary. 
6.	Click the **User Defaults** tab. 

Step	Action
The **User Defaults** page displays.	



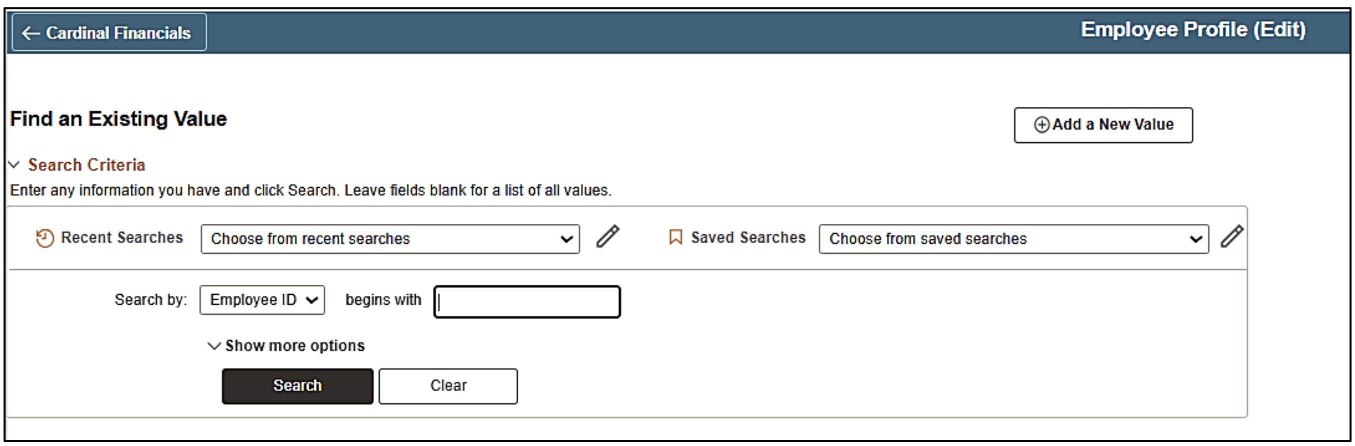
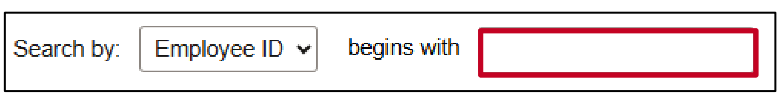
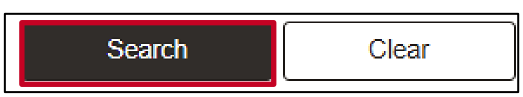
ℹ	This page allows the user to specify defaults that will reduce the data entry required by the expenses employee and processor when entering expense transactions. The **Time Defaults** section of this page is not used in Cardinal.

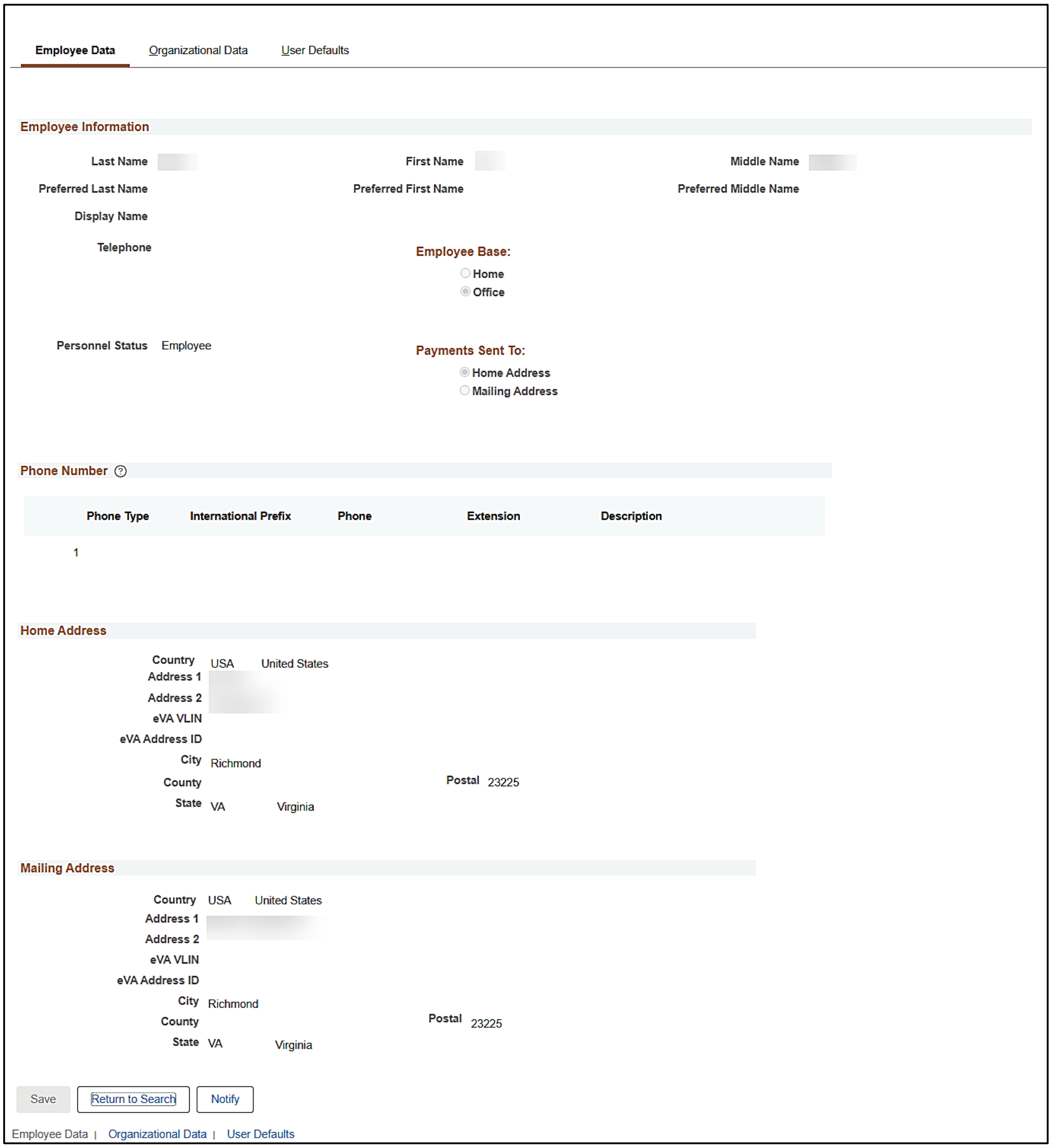
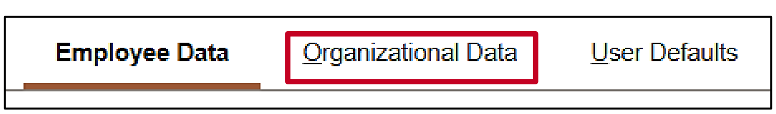
Step	Action
	The **Expense Defaults** section is used to set up values that will automatically default on the expense transactions. These values can help with efficiency when expense transactions are entered. Any of the fields in this section can be set to a default value with the exception of the **Transportion ID** and **Credit Card** fields which are not used in Cardinal. 
	For purposes of this Job Aid, the steps that follow will show how to set up two of the most commonly beneficial fields which are **Per Diem Range** and **Payment Type**. Follow your Agency guidelines regarding any additional fields as applicable.
7.	Click the **Per Diem Range dropdown** button in the **Expense Defaults** section. 
8.	Click the "999 Days" list item. **Note**: This value is required for any expense transactions related to meals. 
9.	Click the **Payment Type Look up** icon. 

Step	Action
	The **Look Up Payment Type** page displays in a pop-up window. 
10.	Click the **CHK** link, which is the only option. **Note**: This will default to the value of “Check” (“CHK”) which is required for all expense types. Please note that this value does not mean the employee will be reimbursed via check. Employee’s receive expense reimbursements via direct deposit, however, this field is required based on system configuration. 
	The **Accounting Detail Default View** field defaults to “Expanded” and should not be changed. 
12.	Click the **Save** button. 

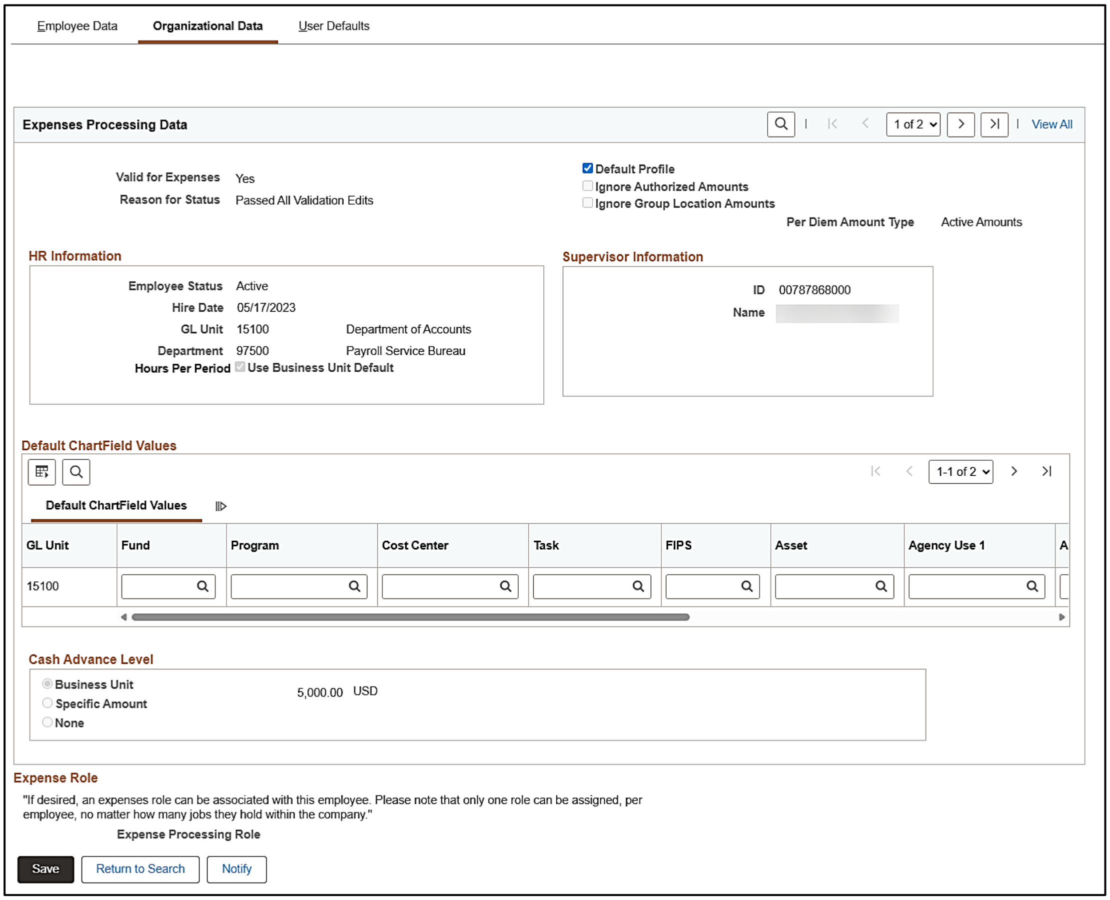
Changing the Employee Profile Default Profile Checkbox

If an employee has multiple employee records, change the **Default Profile** checkbox option for the submitting Agency so that the expenses can be submitted by the related Agency.

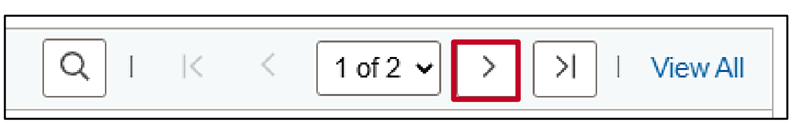
Step	Action
1.	Navigate to the **Employee Profile (Edit)** page using the following path: **NavBar > Menu > Travel and Expenses > Manage Employee Information > Update Employee Detail**
	The **Employee Profile (Edit) Find an Existing Value Search** page displays. 
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled **Overview of the Cardinal FIN Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Employee ID** field. 
3.	Click the **Search** button. 

Step	Action
	The **Employee Profile** page displays with the **Employee Data** tab displayed by default. 
4.	Click the **Organizational Data** tab. 

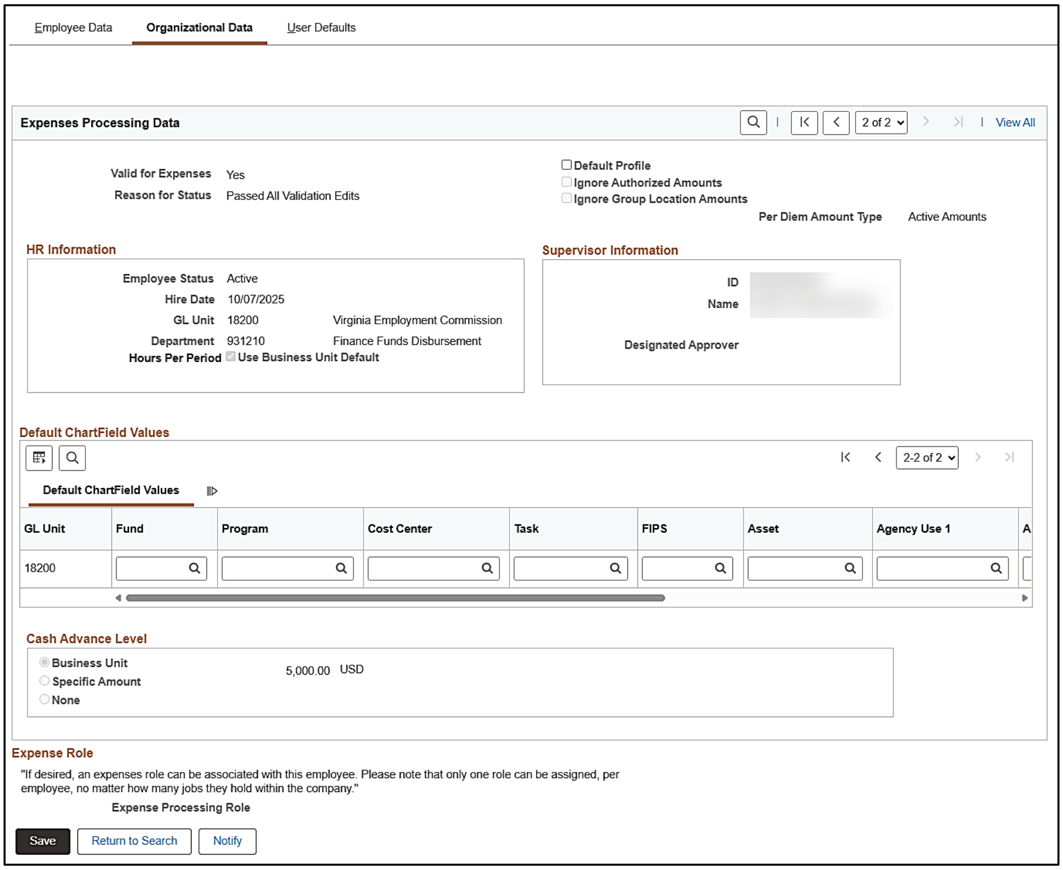
Step	Action
	The **Organizational Data** page displays.



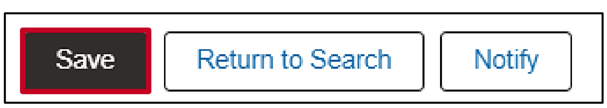
ℹ	When an employee has multiple employee records, the **Default Profile** checkbox option may need to be updated in order to record an expense transaction for the employee. The **Expenses Processing Data** section displays record “1 of 2”, and the **Default Profile** checkbox will be selected on one of the records. If the **Default Profile** checkbox option is not selected for the correct employee record, it will need to be updated. Proceed to **Step 5**.
5.	Click the **Navigation** arrow (**>**) icon at the top of the **Expenses Processing Data** section to view the second employee record for the employee.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The **User Defaults** page displays.


</td></tr>
<tr><td>6.</td><td>Select the **Default Profile** checkbox option.


</td></tr>
<tr><td>7.</td><td>Click the **Save** button.


</td></tr>
<tr><td></td><td>Expense transactions can now be processed for the employee for this selected employee record.</td></tr>
</table>

Employee Moved from One Cardinal Agency to Another Cardinal Agency

If an employee has moved to a Cardinal Agency from another Cardinal Agency, there are several steps that need to be completed by both Agencies:

Example: If an employee is leaving Agency A and moving to Agency B

Agency A must:

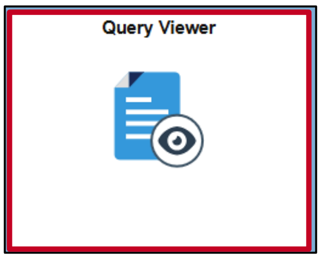
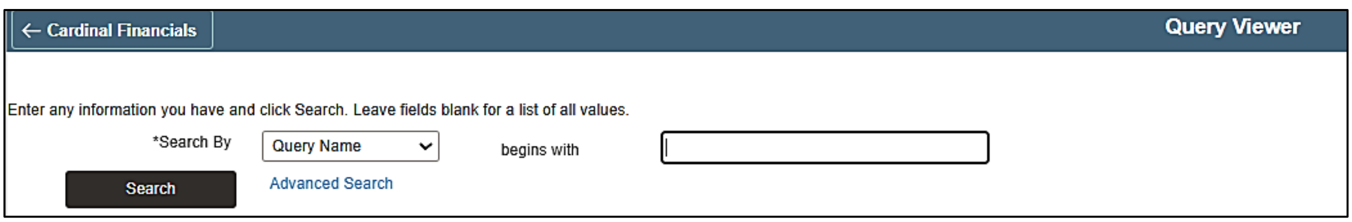
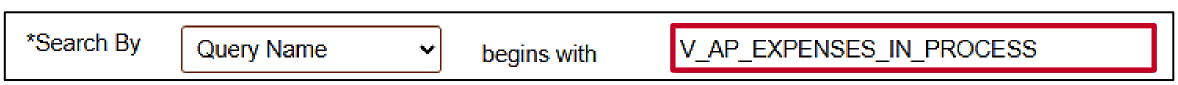
- Have an HR Administrator change the employee status on the profile to “Terminated” for the Agency.
- If this employee was a supervisor (approving other employee’s expenses at your Agency), have an HR Administrator remove the employee from the Supervisor role for all impacted employees and update with the new supervisor.
- Delete all proxies for that employee. For more details, see the Job Aid titled **AP315 Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

Agency B must:

- The Expense Employee profile information will be synced from Cardinal HCM to Cardinal Financials (FIN).
- Add a proxy/proxies for the employee. For more details, see the Job Aid titled **AP315 Authorizing a Proxy for an Employee** located on the Cardinal website in **Job Aids** under **Learning**.

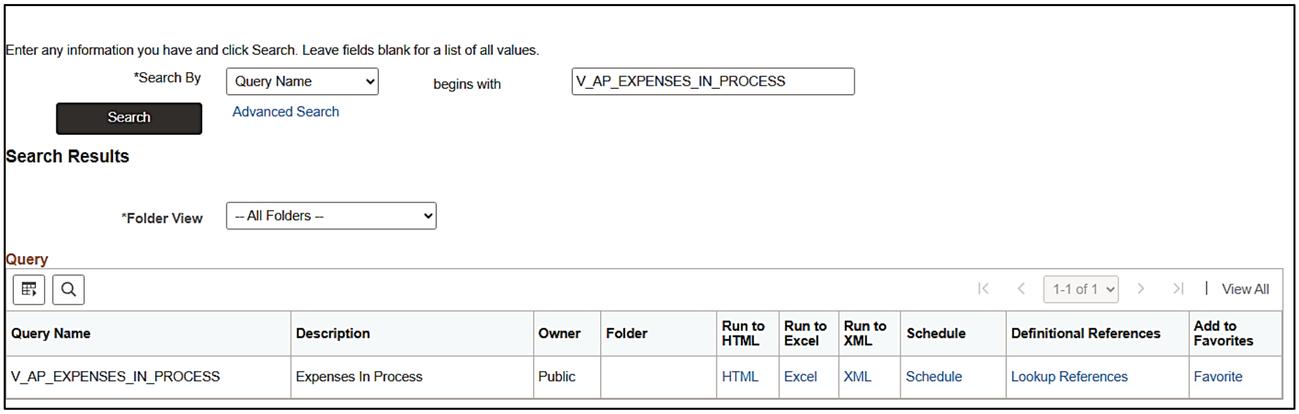
Viewing Transactions in Progress Prior to Changing the Employee Profile Status to Terminated

When an employee no longer works for an Agency, there are some necessary steps to take before the Employee Profile Status is changed to “Terminated”. Verify that all Expense transactions have been either paid or deleted, and there are no items in the queue for the employee that requires approval. After this verification, contact an HR Administrator to update the Employee Profile to a status of “Terminated”.

Step	Action
1.	Navigate to the **Query Viewer** page by clicking the **Query Viewer** tile on the **Cardinal Financials Homepage**. 
	The **Query Viewer** page displays. 
2.	Enter “V_AP_EXPENSES_IN_PROCESS” in the **Query Name** field. 
3.	Click the **Search** button. 

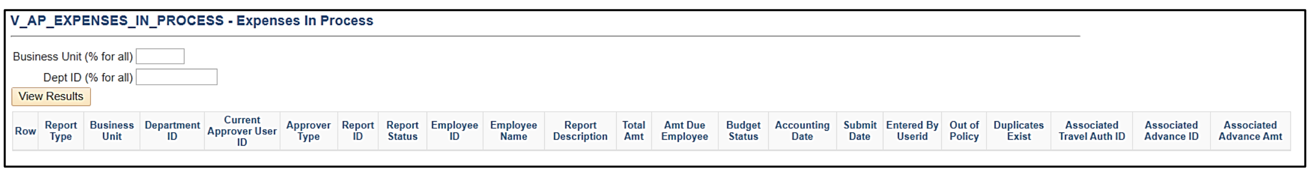
Step	Action

The Query displays in the **Search Results** section.

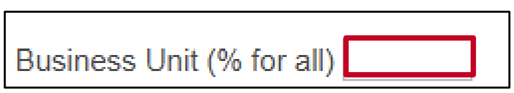


4. Click the **Excel** link in the **Run to Excel** column.

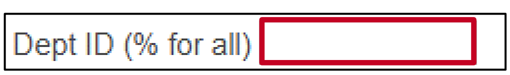
The Query displays.



5. Enter the Agency Business Unit in the **Business Unit** field.

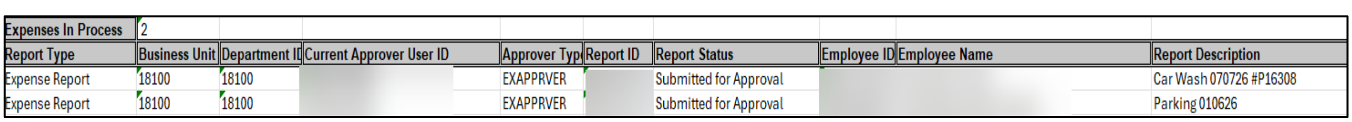


6. Enter a specific Department ID in the **Dept ID** field or “%” for all Departments.



7. Click the **View Results** button.

The Query downloads to Excel.



Step	Action
8.	Review the results to determine if the employee that is terminating has any transaction(s) in progress. If so, ensure they are approved or deleted as appropriate. Once this has been completed proceed to the Terminating the Employee in Cardinal section of this Job Aid.

Terminating the Employee in Cardinal

Contact an Agency HR Administrator to update the employee's Job Data to a status of "Terminated".