

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.



Accounts Payable Job Aid

AP316 Updating an Employee Expense Profile

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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.



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Updating an Employee Profile Overview

[Employee Data](#) [Organizational Data](#) [User Defaults](#)

Expenses Processing Data

Valid for Expenses Yes
Reason for Status Passed All Validation Edits

☒ Default Profile
☐ Ignore Authorized Amounts
☐ Ignore Group Location Amounts

Per Diem Amount Type Active Amounts

HR Information

Employee Status Active
Hire Date 08/10/2025
GL Unit 15100 Department of Accounts
Department 95200 Financial Reporting
Hours Per Period ☐ Use Business Unit Default

Supervisor Information
ID 00178737800
Name

Default ChartField Values

Default ChartField Values

GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	A
15100	01000	737004						

Cash Advance Level

☒ Business Unit 5,000.00 USD
☐ Specific Amount
☐ None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."
Expense Processing Role

Save

Return to Search

Previous in List

Next in List

Notify

[Employee Data](#) [Organizational Data](#) [User Defaults](#)

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:

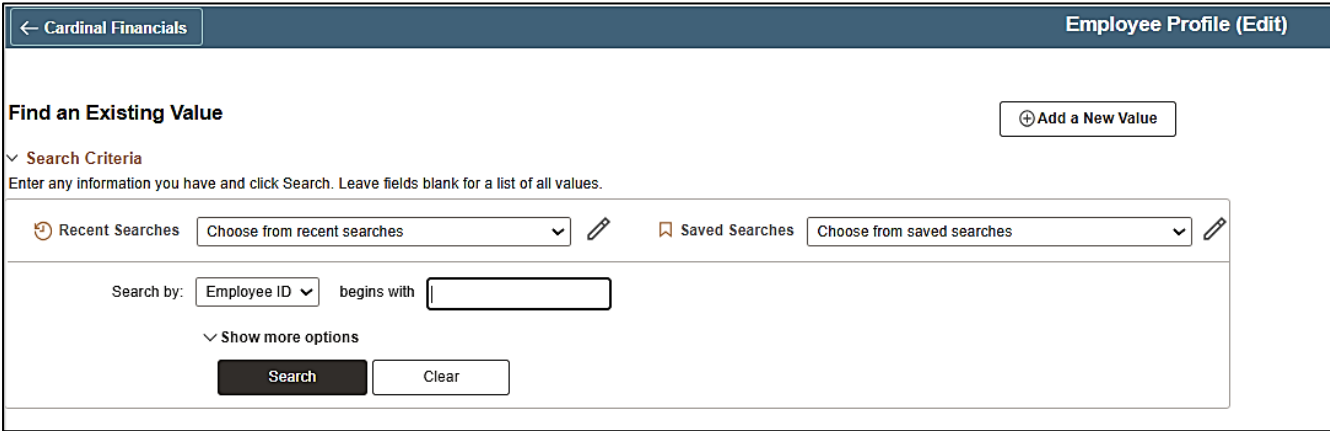
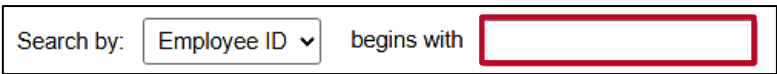
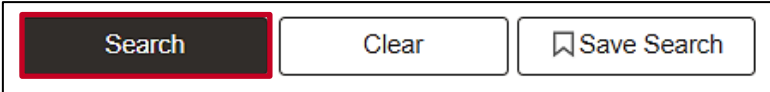
- Employee works for the Agency and requires changes (e.g., moves to another Department, assigned to a new supervisor, etc.)
- Employee moves from one state Agency to another state Agency
- Employee leaves the Agency and their status needs to be updated to terminated

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. ← Organizational Data Employee Data Organizational Data User Defaults Employee Information Last Name First Name Middle Name Preferred Last Name Preferred First Name Preferred Middle Name Display Name Telephone Employee Base: ☐ Home ☒ Office Personnel Status Employee Payments Sent To: ☒ Home Address ☐ Mailing Address Phone Number ⓘ <table border="1"> <thead> <tr> <th>Phone Type</th> <th>International Prefix</th> <th>Phone</th> <th>Extension</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table> Home Address Country USA United States Address 1 Address 2 eVA VLIN eVA Address ID City Richmond County State VA Virginia Postal 23220 Mailing Address Country Address 1 Address 2 eVA VLIN eVA Address ID City County State Postal Save Return to Search Notify Employee Data Organizational Data User Defaults	Phone Type	International Prefix	Phone	Extension	Description	1				
Phone Type	International Prefix	Phone	Extension	Description							
1											
	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. Employee Data Organizational Data User Defaults

The **Organizational Data** page displays.

Employee Data
Organizational Data
User Defaults

Expenses Processing Data

Valid for Expenses Yes
Reason for Status Passed All Validation Edits

☒ Default Profile
☐ Ignore Authorized Amounts
☐ Ignore Group Location Amounts

Per Diem Amount Type Active Amounts

HR Information

Employee Status Active
Hire Date 08/10/2025
GL Unit 15100 Department of Accounts
Department 95200 Financial Reporting
Hours Per Period ☒ Use Business Unit Default

Supervisor Information

ID 00178737800
Name

Default ChartField Values

GL Unit	Fund	Program	Cost Center	Task	FIPS	Asset	Agency Use 1	A
15100	01000	737004						

Cash Advance Level

☒ Business Unit 5,000.00 USD
☐ Specific Amount
☐ None

Expense Role

"If desired, an expenses role can be associated with this employee. Please note that only one role can be assigned, per employee, no matter how many jobs they hold within the company."

Expense Processing Role

Save
Return to Search
Notify

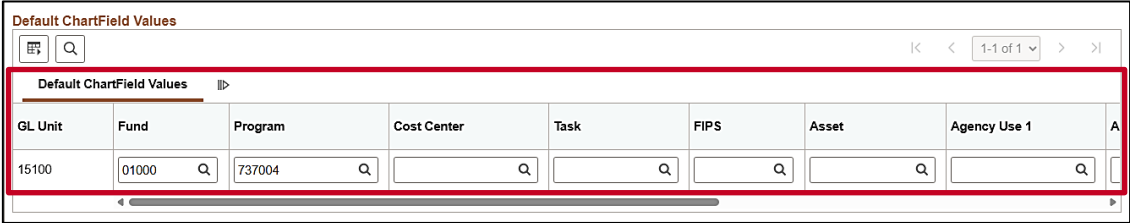


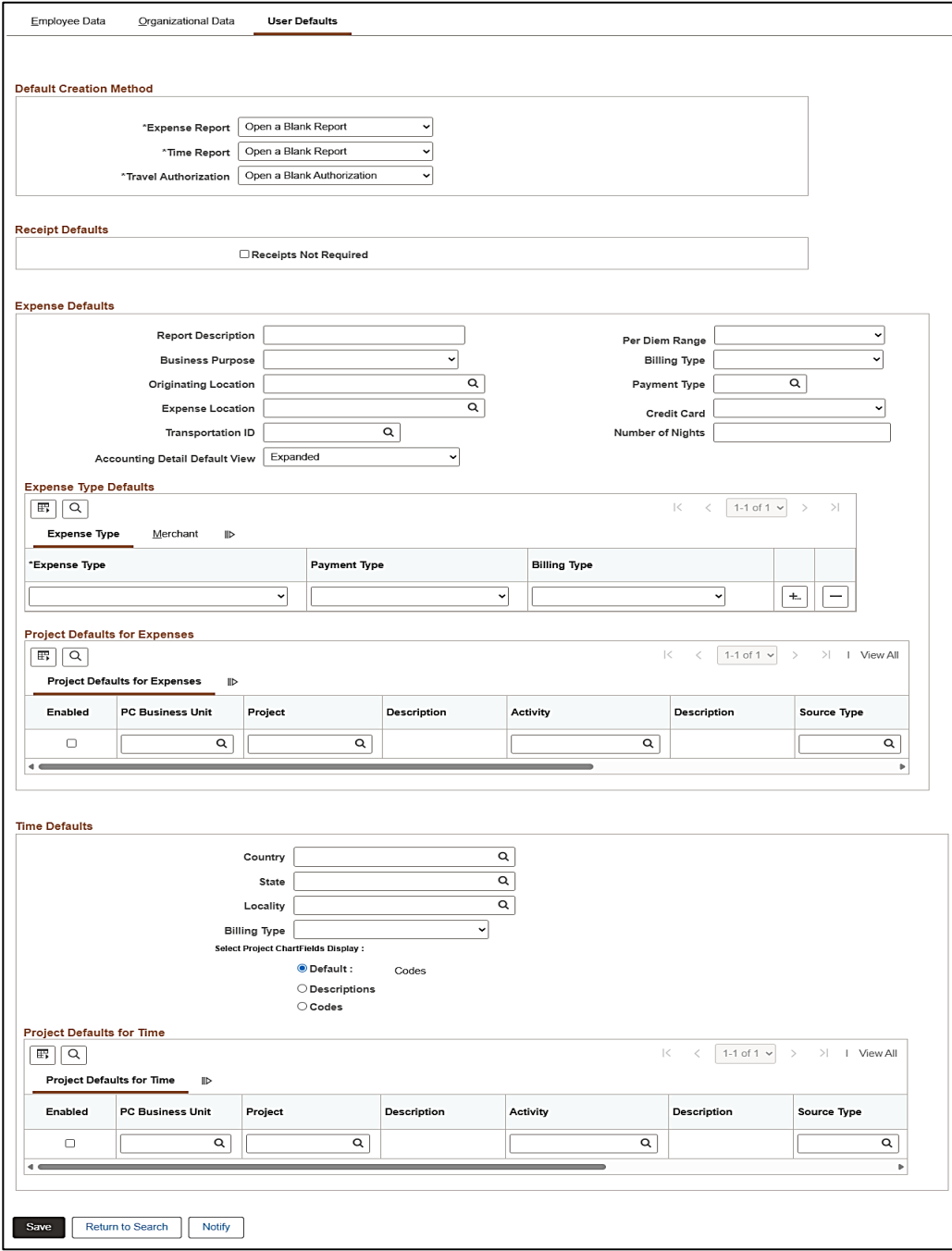
Review the data in the **HR Information** section which is synced from Cardinal HCM to verify accuracy.

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.

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

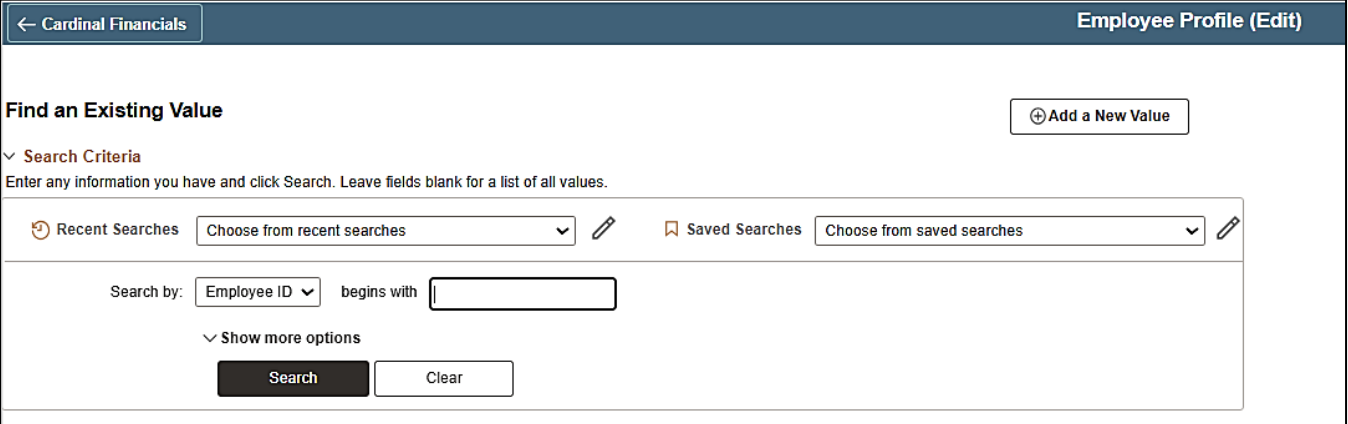
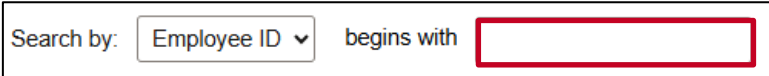
Step	Action
	The User Defaults page displays. 
	 This page allows the user to specify defaults that will reduce the data entry required by the expenses employee and processor when entering expense transactions. The Time Defaults section of this page is not used in Cardinal.

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 Transportation ID and Credit Card fields which are not used in Cardinal. Expense Defaults <table style="width: 100%;"> <tr> <td>Report Description </td> <td>Per Diem Range </td> </tr> <tr> <td>Business Purpose </td> <td>Billing Type </td> </tr> <tr> <td>Originating Location </td> <td>Payment Type </td> </tr> <tr> <td>Expense Location </td> <td>Credit Card </td> </tr> <tr> <td>Transportation ID </td> <td>Number of Nights </td> </tr> <tr> <td>Accounting Detail Default View </td> <td></td> </tr> </table>	Report Description	Per Diem Range	Business Purpose	Billing Type	Originating Location	Payment Type	Expense Location	Credit Card	Transportation ID	Number of Nights	Accounting Detail Default View	
Report Description	Per Diem Range												
Business Purpose	Billing Type												
Originating Location	Payment Type												
Expense Location	Credit Card												
Transportation ID	Number of Nights												
Accounting Detail Default View													
	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. Per Diem Range												
8.	Click the “999 Days” list item. Note: This value is required for any expense transactions related to meals. - 0 Days - 0 Days - 0 Days - 999 Days												
9.	Click the Payment Type Look up icon. Payment Type												

Step	Action				
	The Look Up Payment Type page displays in a pop-up window. Look Up Payment Type Search by: Payment Type begins with Search Cancel Advanced Lookup Search Results View 100 < 1-1 of 1 > <table><thead><tr><th>Payment Type</th><th>Description</th></tr></thead><tbody><tr><td>CHK</td><td>Check</td></tr></tbody></table>	Payment Type	Description	CHK	Check
Payment Type	Description				
CHK	Check				
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. <table><thead><tr><th>Payment Type</th><th>Description</th></tr></thead><tbody><tr><td>CHK</td><td>Check</td></tr></tbody></table>	Payment Type	Description	CHK	Check
Payment Type	Description				
CHK	Check				
i	The Accounting Detail Default View field defaults to “Expanded” and should not be changed. Accounting Detail Default View Expanded				
12.	Click the Save button. Save Return to Search Notify				

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.

Employee Data

Organizational Data

User Defaults

Employee Information

Last Name

First Name

Middle Name

Preferred Last Name

Preferred First Name

Preferred Middle Name

Display Name

Telephone

Employee Base:

Home

Office

Personnel Status

Employee

Payments Sent To:

Home Address

Mailing Address

Phone Number

Phone Type	International Prefix	Phone	Extension	Description
1				

Home Address

Country

USA

United States

Address 1

Address 2

eVA VLIN

eVA Address ID

City

Richmond

County

State

VA

Virginia

Postal

23225

Mailing Address

Country

USA

United States

Address 1

Address 2

eVA VLIN

eVA Address ID

City

Richmond

County

State

VA

Virginia

Postal

23225

Save

Return to Search

Notify

Employee Data

Organizational Data

User Defaults

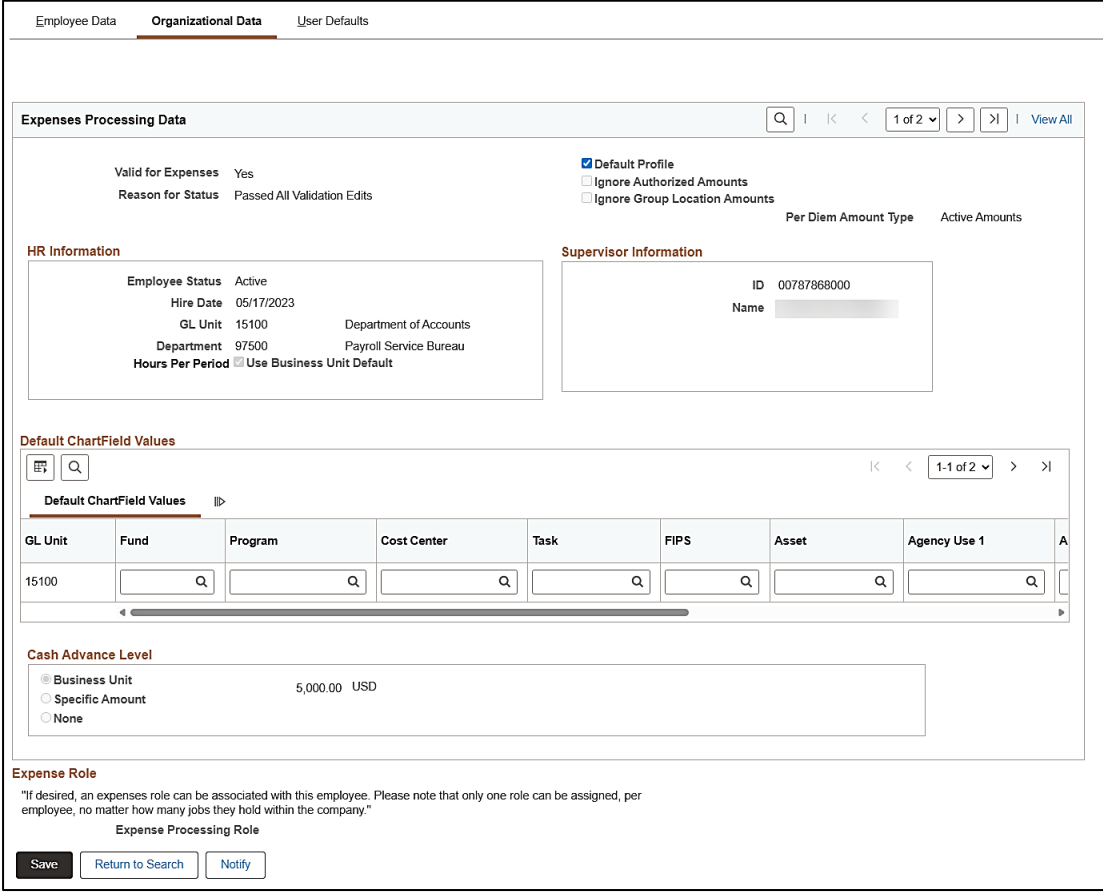
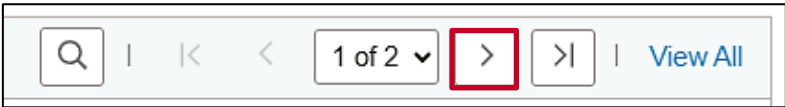
4.

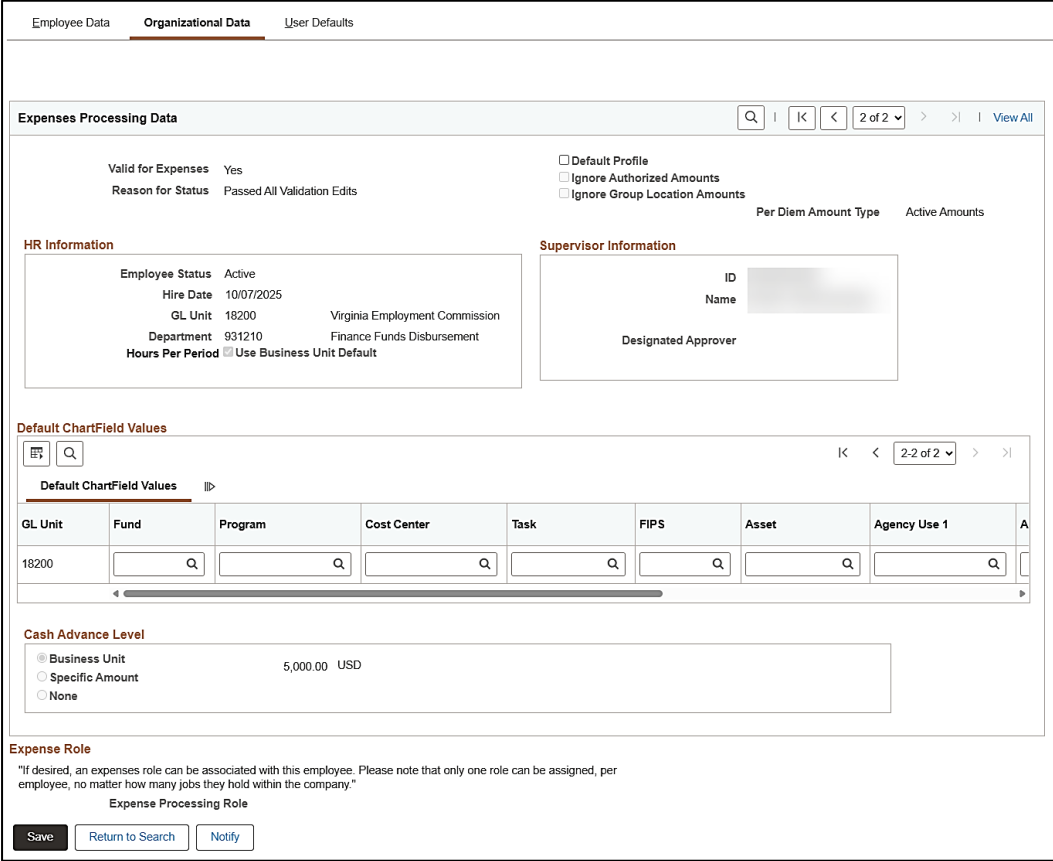
Click the **Organizational Data** tab.

Employee Data

Organizational Data

User Defaults

Step	Action
	The Organizational Data page displays. 
	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. 

Step	Action
	The User Defaults page displays. 
6.	Select the Default Profile checkbox option. 
7.	Click the Save button. 
	Expense transactions can now be processed for the employee for this selected employee record.

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:

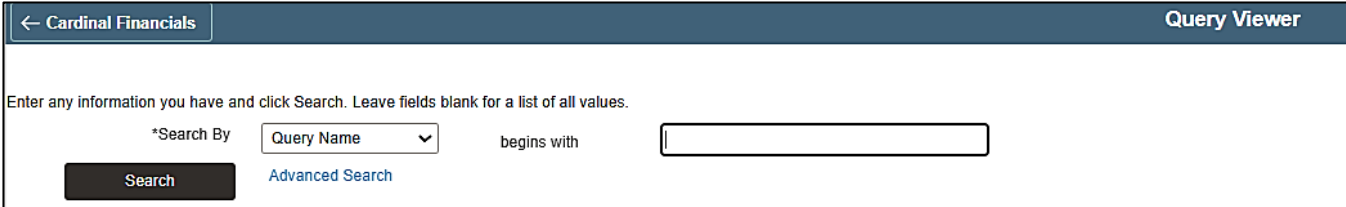
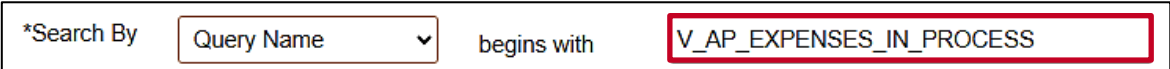
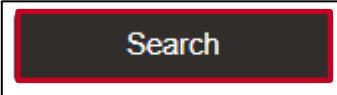
- Have an HR Administrator change the employee status on the profile to “Terminated” for the Agency.
- If this employee was a supervisor (approving other employee’s expenses at your Agency), have an HR Administrator remove the employee from the Supervisor role for all impacted employees and update with 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. 



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

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

[Advanced Search](#)

Search Results

*Folder View

Query

Grid Q	1-1 of 1 View All								
Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Add to Favorites
V_AP_EXPENSES_IN_PROCESS	Expenses In Process	Public		HTML	Excel	XML	Schedule	Lookup References	Favorite

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



The Query displays.

V_AP_EXPENSES_IN_PROCESS - Expenses In Process

Business Unit (% for all)

Dept ID (% for all)

Row	Report Type	Business Unit	Department ID	Current Approver User ID	Approver Type	Report ID	Report Status	Employee ID	Employee Name	Report Description	Total Amt	Amt Due Employee	Budget Status	Accounting Date	Submit Date	Entered By Userid	Out of Policy	Duplicates Exist	Associated Travel Auth ID	Associated Advance ID	Associated Advance Amt
-----	-------------	---------------	---------------	--------------------------	---------------	-----------	---------------	-------------	---------------	--------------------	-----------	------------------	---------------	-----------------	-------------	-------------------	---------------	------------------	---------------------------	-----------------------	------------------------

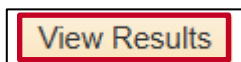
5. Enter the Agency Business Unit in the **Business Unit** field.

Business Unit (% for all)

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

Dept ID (% for all)

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



The Query downloads to Excel.

Expenses In Process	2																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																																		
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Accounts Payable Job Aid

AP316 Updating an Employee Profile

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.



Accounts Payable Job Aid

AP316 Updating an Employee Profile

Terminating the Employee in Cardinal

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