



**HR351**  
**Cardinal Employee Data Setup  
and Maintenance**

**Instructor Led Training**



# Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

The following HCM training materials are located on the Cardinal website ([www.cardinalproject.virginia.gov](http://www.cardinalproject.virginia.gov)) under **Learning**

- Job Aids on topics across all functional areas
- Functional process and instructional videos

The Cardinal HCM Reports Catalog is located on the Cardinal website under Resources.

This course and all other Cardinal HCM training courses are available on the Cardinal Training Management System.

The system screenshots included in the Cardinal HCM training courses show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



# Introductions

## Class Participant Introductions

- Please then share with the class the following information:
  - Name
  - Agency
  - Role & how long you've been in it
  - What is your favorite restaurant?
- After you are finished, **mute** your microphone.



# Course Objectives

After completing this course, you will be able to:

- ✓ Explain how the Cardinal HCM functional areas work together
- ✓ Add, clone, and maintain a position
- ✓ Hire an employee online (Personal and Job Data)
- ✓ Enter job data updates (Transfer, Leave, Separation)
- ✓ Enter additional pay information
- ✓ Review the mass upload options



# Course Objectives

After completing this course, you will be able to:

- ✓ Enter and maintain Disciplinary Actions
- ✓ Enter and maintain Performance Ratings
- ✓ Enter and maintain Rewards and Recognition
- ✓ Access the HCM Reports Catalog
- ✓ Run a Report
- ✓ Run a Query



# Agenda

1

Overview of Cardinal HCM

2

Key HCM Concepts

3

Setup and Maintain Employee HR Data

4

Maintain Employee Pay

5

Maintain Additional HR Data

6

Running Reports and Queries



# Lesson

1

## Overview of Cardinal HCM

This lesson covers the following topics:

- Cardinal HCM data supports the administration of:
  - Human Resource (HR)
  - Benefits (BN)
  - Time & Attendance (TA)
  - Payroll (PY)



# Cardinal HCM Human Resources

The Human Resources (HR) functional area contains all employee HR data related to the employee lifecycle. The business processes and sub-processes that make up the core HR functionality enable agencies to add and update:

- Position data (e.g., job code, department, location)
- Employee personal data (e.g., name, address)
- Employee job data (e.g., salary, hourly rate, pay group)

HR data maintained in the Human Resources functional area feeds into and supports all of the other HCM functional areas.

Cardinal HCM allows for the interfacing of HR data (e.g., personal, position, employee job data) from agency systems to Cardinal HCM.

The personal data record for an employee working in multiple agencies is shared by the applicable agencies.





# Cardinal HCM Human Resources (continued)

The following HR business processes and sub-processes are part of Cardinal HCM:

- Set Up and Maintain Employee HR Data
  - Create and Maintain Position
  - Hire/Rehire Employee
  - Maintain Employee Data
  - Transfer Employee
  - Enter and Maintain Leave Status
  - Separate Employee
  - Mass HR Data Maintenance
  - Update Employee Compensation
  
- Administer Salary Plans
  - Administer Salary Plans
  
- Maintain Additional HR Data
  - Enter and Maintain Disciplinary Actions
  - Enter and Maintain Performance Ratings
  - Enter and Maintain Rewards and Recognition

All of this data is utilized by other functional areas in Cardinal HCM and Cardinal Financials.





# Cardinal HCM Benefits

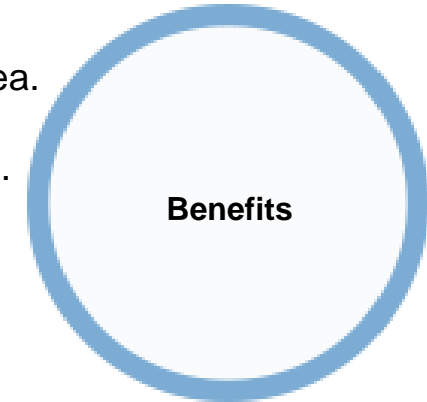
The Benefits Administration (BN) functional area includes all of the processes required to maintain health benefits for the employees of the organization and their dependents. Benefits data maintained in the Benefits functional area feeds into the Payroll functional area.

The Employee Job records from HR are required for employees covered by health benefits.

COBRA letter processing, as well as COBRA enrollment, are administered centrally by the Office of Health Benefits (OHB) triggered by data entered on the Employee Job Record.

The following BN business processes and sub-processes are part of Cardinal HCM:

- Administer Event Maintenance
  - Maintain Enrollments
    - System Generated
    - Forms Life Events
    - Qualified Medical Support Court Orders (QMSCO)
    - Retirement
    - Deferred Compensation
    - Annuity
- Administer Open Enrollment
  - Administer Open Enrollment
- Administer COBRA
- Benefits Reconciliation
  - Healthcare Reconciliation
  - VRS Retirement Reconciliation
- ACA Reporting





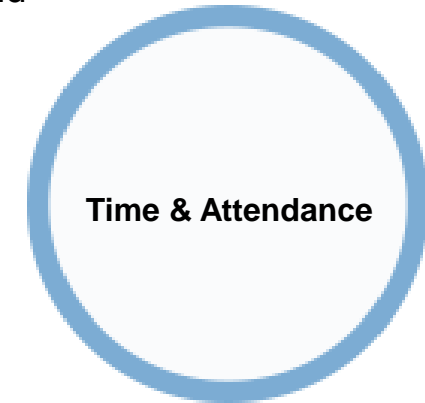
# Cardinal HCM Time and Attendance

The Time & Attendance (TA) functional area contains two modules: Time and Labor (TL) and Absence Management (AM). TA handles time and leave entry, as well as provides leave balances. The Time and Attendance functional area is used to record productive and non-productive time which drives pay for employees. Time entered feeds into the Payroll functional area.

Employee Job records from HR are required for employees who use TA to track time worked and leave.

The following TA business process and sub-processes are part of Cardinal HCM:

- TA Employee Setup
  - Enroll and Maintain Time Reporters and Comp Plan Enrollment
  - Create and Maintain Schedules
  
- TA Capture
  - Manage Time Entry
  - Manage Absence Reporting
  
- TA Approval and Processing
  - Administer Time and Processing
  - Administer Absence Processing
  - Administer Delegation
  
- Payroll Integration and Cost Allocation
  - Integration between Cardinal Time and Attendance and Payroll
  - Cost Allocation of Time after Payroll



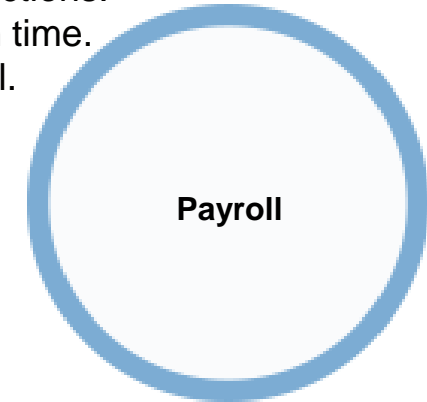


# Cardinal HCM Payroll

Payroll (PY) is the functional area that enables the calculation of earnings, taxes, and deductions. The Payroll functional area is used to ensure that all employees are paid accurately and on time. Employee Job records from HR are required for employees who will be paid out of Cardinal.

The following PY business processes and sub-processes are part of Cardinal HCM:

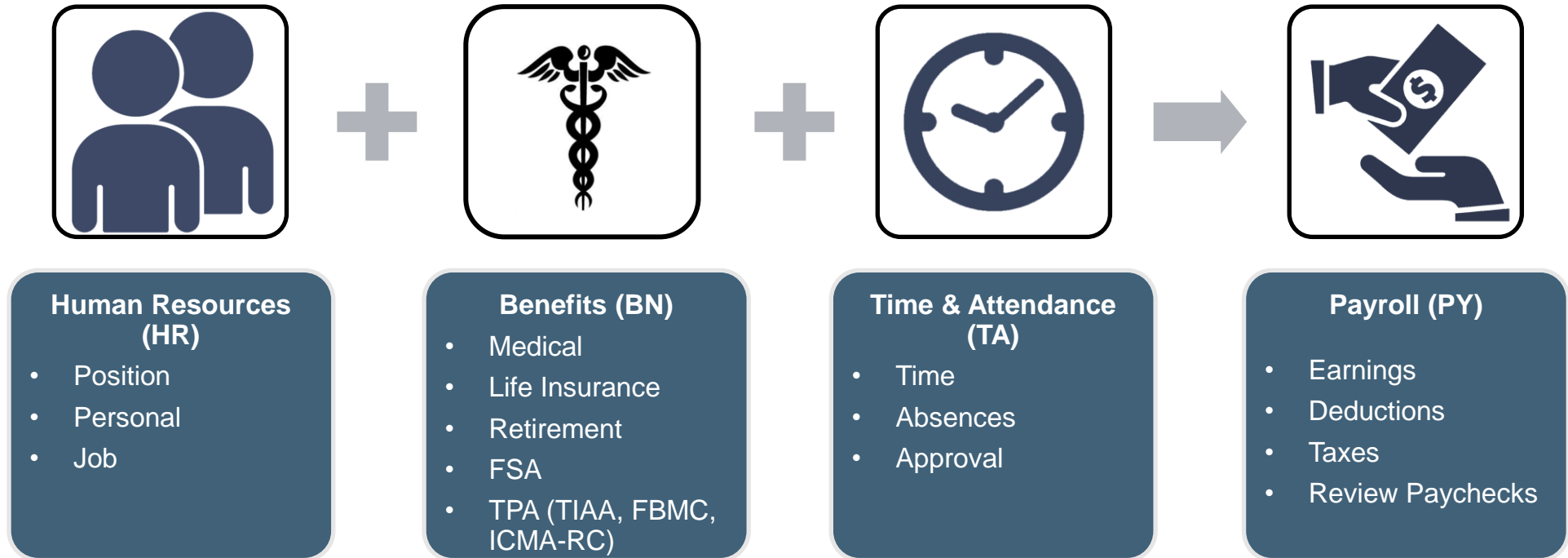
- Maintain Employee Payroll Data
  - Additional Pay
  - Employee Deductions
  - Employee Direct Deposits
  - Employee Taxes
- Using Single-Use Payroll Online Tool
  - Enter Payroll Adjustments
  - Approve Transactions
- Process Payroll
  - Create Paysheets
  - Calculate Pay
  - Confirm Payroll
- Off-cycle Processing
- Post Payroll
  - Process Pay Period Tax Payments
  - Process Pay Period Non-Tax Payments
- Payroll Costing
  - General Ledger Integration
  - Accounts Payable Integration
- Periodic Regulatory Reporting
  - Audit and Adjust Employee Balances
  - Prepare and File Regulatory Reports
  - Calendar Year End





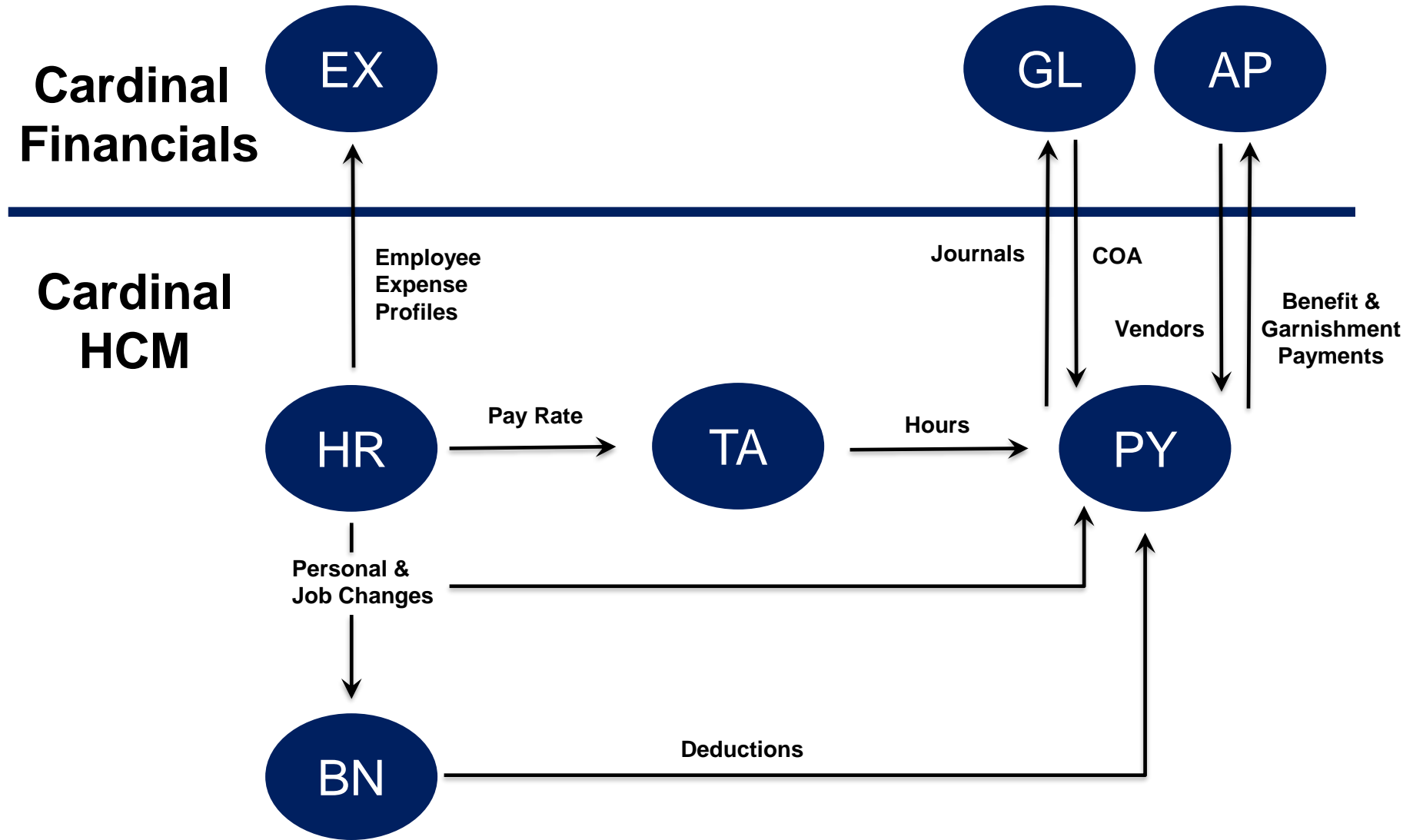
# Cardinal HCM Modules

The functional areas work together to generate an employee's paycheck.





# Cardinal HCM Interfacing to Cardinal Financials



**Financials:** Expenses (EX), General Ledger (GL), Accounts Payable (AP)

**HCM:** Human Resources (HR), Benefits Administration (BN), Time & Attendance (TA), Payroll (PY)

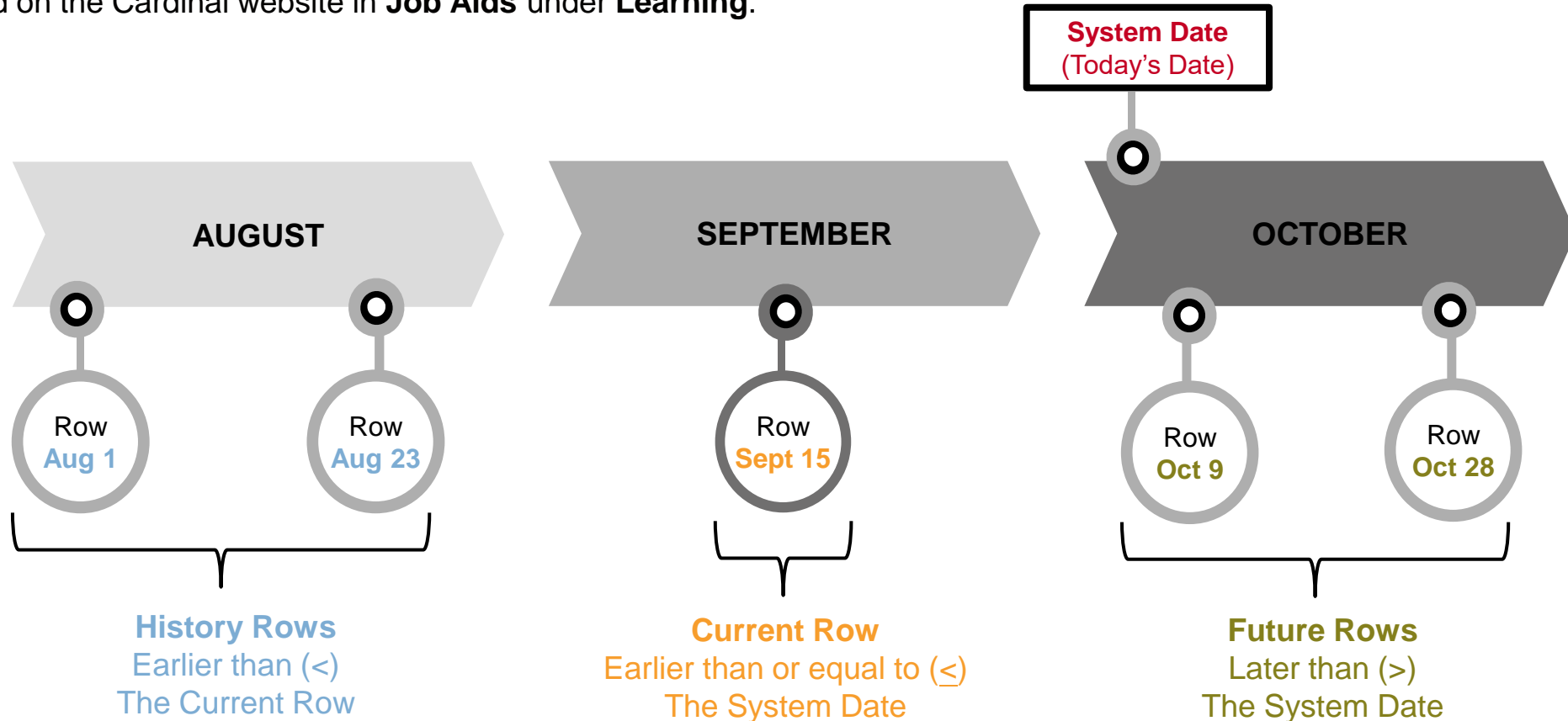


# Cardinal Effective Dating

When entering new information related to existing data, such as a leave of absence, retaining the data already in the database is imperative. To retain history, insert a data row identified by a date that indicates when the new information goes into effect: an effective date.

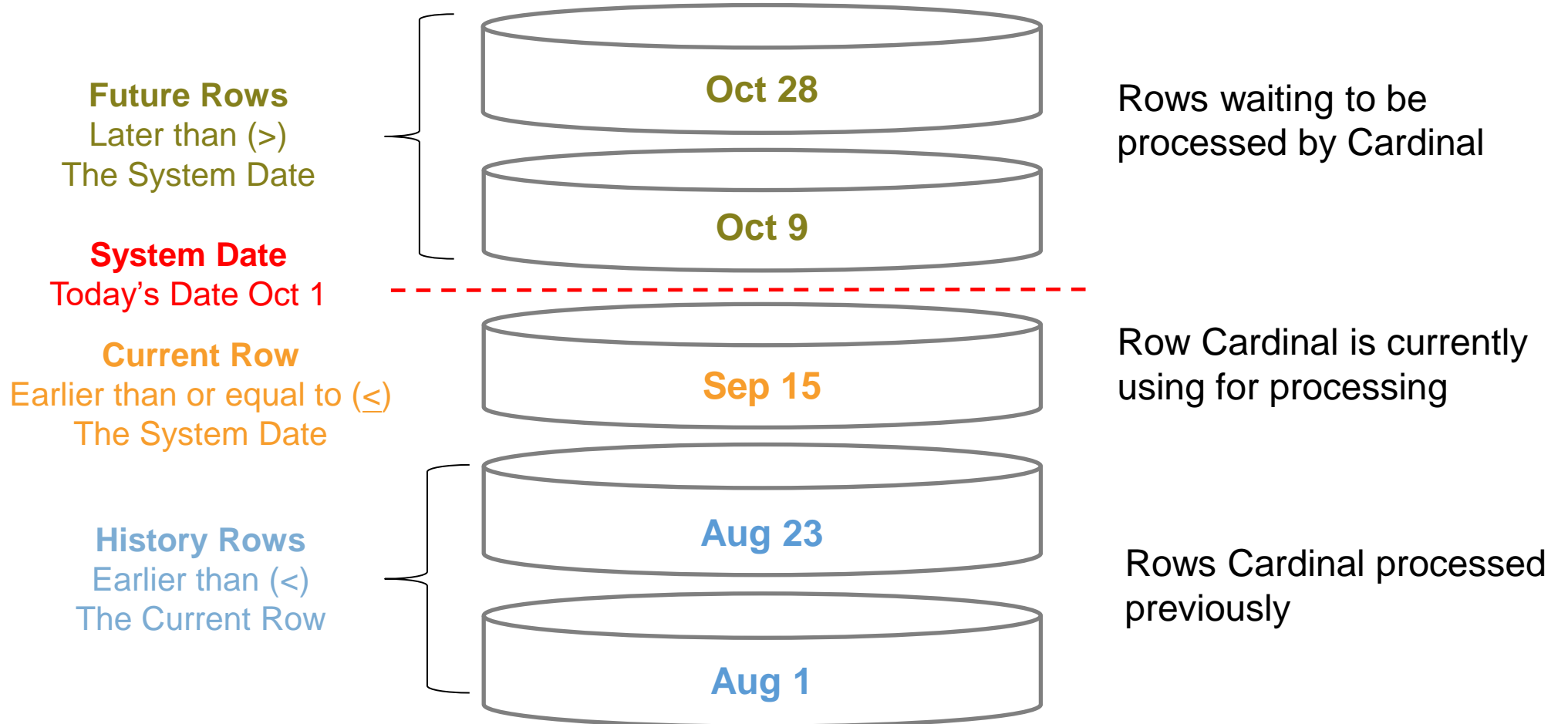
Effective dating provides the ability to keep historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.





# Cardinal Effective Dating Layer Cake





# Cardinal Effective Dating (continued)

The Personal Record and Job Record Effective Dating impact each other and other functional areas.

The Effective Date of the hire on the Job Record cannot be prior to the Effective Date on the Personal Data Hire Record.

The screenshot displays two overlapping HR system windows. The top window, titled 'Work Location', shows details for an employee with Empl ID [redacted] and Empl Record 0. The 'Work Location Details' section includes a table with one entry where the '\*Effective Date' is 11/10/2019. Other details include Effective Sequence 0, HR Status Active, Payroll Status Active, \*Action Hire, Reason New Hire, and \*Job Indicator Primary Job. The position is identified as 'Test-Corr Ent Systems Analyst' with Position Number BCCHR002. The bottom window, titled 'Benefit Program Participation Details', shows a table with one entry where the '\*Effective Date' is 11/10/2019. Other details include Currency Code USD and \*Benefit Program SAL. The employee's Date of Birth is 05/01/1990.



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. True or False. The effective date does not impact anything in the system.



2. When completing a hire, the **Personal Data** page must be effective dated:  
A. After the effective date of the Job Record  
B. Prior to or equal to the effective date of the Job Record



3. True or False. When creating a new Position, there is no consideration given to the effective date used.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Lesson Summary

1

## Overview of Cardinal HCM

In this lesson, you learned:

- Cardinal HCM data supports the administration of:
  - Human Resources (HR)
  - Benefits (BN)
  - Time & Attendance (TA)
  - Payroll (PY)
- All records in Cardinal HCM are effective dated and the importance of effective dates
- Cardinal is a web-based Financial and Human Capital Management System



# Lesson

2

## Key HCM Concepts

This lesson covers the following topics:

- HR Data Relationships
  - Position Data
  - Personal Data
  - Employee Job Record



# HR Data Relationships



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. What three data types can be entered online or interfaced to Cardinal? (Select all that apply)
  - A. Positions
  - B. Personal Data
  - C. Weather Data
  - D. Job Data



2. Does the approval process for a new position takes place in Cardinal?
  - A. Yes
  - B. No



3. What type of data is entered **first** in Cardinal? (Select all that apply)
  - A. Direct Deposit Data
  - B. Personal Data
  - C. Position Data
  - D. Employee Data



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



4. What type of data is entered second into Cardinal? (Select all that apply)
- A. Personal Data
  - B. Direct Deposit Data
  - C. Position Data
  - D. Employee Data



5. What items are needed to complete entry of personal data? (Select all that apply)
- A. Effective Date
  - B. Name
  - C. Date of Birth
  - D. SSN
  - E. Gender
  - F. Email Address



6. What elements are needed to complete the job record? (Select all that apply)
- A. Effective Date
  - B. Position
  - C. Home Address
  - D. Compensation
  - E. Benefits Program



# HCM Key Concept

## 1 POSITION DATA\*

**Position: DOA10001**  
Pos Descr: Sr Account Analyst  
Business Unit: 15100  
Reports To: DOA10003

**Position: DOA10002**  
Pos Descr: Sr Account Analyst  
Business Unit: 15100  
Reports To: DOA10003

**Position: ABC10012**  
Pos Descr: Store Clerk  
Business Unit: 99900  
Reports To: ABC10123

## 3 JOB DATA\*

**Empl ID: 00100123400**  
Empl Rcd: 0  
Position: DOA10001  
Business Unit\*\*: 15100  
Benefit Program: SAL  
Reports To\*\*: DOA10003  
Pay Rate: 40,200.00/yr

**Empl ID: 00100123600**  
Empl Rcd: 0  
Position: DOA10002  
Business Unit\*\*: 15100  
Benefit Program: SAL  
Reports To\*\*: DOA10003  
Pay Rate: 38,200.00/yr

**Empl ID: 00100123600**  
Empl Rcd: 1  
Position: ABC10012  
Business Unit\*\*: 99900  
Benefit Program: WGE  
Reports To\*\*: ABC10123  
Pay Rate: 12.00/hr

## 2 PERSONAL DATA\*

**Empl ID: 00100123400**  
Name: Jane Doe  
Address: 123 Main Street,  
Richmond, VA 23222  
SSN: 123-45-6789

**Empl ID: 00100123600**  
Name: Mark Thomas  
Address: 123 Valley Dr,  
Richmond VA 23222  
SSN: 345-67-8999

\*Fields/data elements listed are only a sample for representative purposes

\*\*Indicates a field on job data that is inherited from position data



# Lesson Summary

2

## Key HCM Concepts

In this lesson, you learned:

- Position and job share a one-to-one relationship (for most agencies)
- The position is created and associated with a job before an employee is linked to the position
- Position numbers are unique IDs
- Employee personal data is required to save the new hire record
- Employee data is changed on the job record, not on the position
- Core employee data entered on the personal and job data pages is used by other HCM functional areas



# Lesson

3

## Setup and Maintain Employee HR Data

This lesson covers the following topics:

- Creating and Maintaining Position Data
- Hiring or Rehiring an Employee
- Approving Employee Self Service Transactions
- Intra-Agency Transfer
- Inter-Agency Transfer
- Maintain Leave Status
- Separate Employee
- Mass HR Data Maintenance



# Creating and Maintaining Position Data

Agencies using Cardinal to maintain employee job information and/or participant state health benefits must create/maintain positions in Cardinal.

Agencies continue to utilize agency-specific systems or paper forms to capture position information and route for approvals (e.g., agency budget, HR approvals) within the Agency.

Position Status defaults to “Approved”. Frozen status does not remove position from Employee Position Reporting (EPR) report. Status Inactive removes position from EPR Report.

## **Positions:**

- Required and tracked (vacant or filled)
- Created for all employees
- Created before employee is hired
- Changed at position level then conveyed to Employee Job Record

## **Position IDs :**

- Unique for each agency and begin with three-character alpha prefix that represents Agency (the alpha prefix is Company)
- Parent Agencies can enter positions for child Agencies
- Each agency must develop a process to track the sequential Position IDs

For further information on Creating/Cloning Positions, see the Job Aid titled **HR351 Managing Position Data**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Creating and Maintaining Position Data (continued)

**New Search**

Position Number

Description

Position Status

**View Manage/Create Position**

100 results found.

Chart  No

**+ Add**

100 rows

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
-----------------	-------------	------------	---------------	---------	------------	--------	----------	--------------------

Position Number CJS02000  
Headcount Status Open  
Current Head Count 0

**Next >**

**1 Position Data** Visited

**2 Specific Information** Visited

**3 Budget Incumbents** Visited

**4 Review and Submit** Not Started

**Step 1 of 4: Position Data**

Effective Date 08/01/2021  
Effective Sequence 0  
Reason Code NEW

Review Date

\*Position Months 12.00

Stmnt of Economic Interest Req  No

VPA Covered  Yes

**Position Information**

\*Position Status

\*Status

Action Date 08/11/2021

Alternate Work Schedule  Yes

Key Position  No

Budgeted Position  Yes

**Confidential Position**  No

Max Head Count 1

Status Date 05/29/2020

SOC Code / Extension 13-2011

Job Sharing Permitted  No

Available for Telework  No

\*EEO-4 Job Category No EEO-4 Reporting

Workers' Comp Code 8810

**Job Information**



# Creating and Maintaining Position Data (continued)

## Updating Employee and Position Counts

- Cardinal’s custom Employee Position Reporting (EPR) tool resembles current DHRM EPR
  - Generates required data to legislatively mandated reports
  - Automatic batch process runs at end of month to enable Agency HR Teams to use EPR Tool
  - HR Administrators and HR EPR Only Users use to update and certify filled Position counts correctly reflected

Business Unit 14000 Dept of Criminal Justice Svcs

Employee Position Reports

Non-Faculty | Faculty | Totals

Non-Faculty 1-3 of 25 View All

*Effective Date		Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020	General Fund	115	115.00	0	0.00	12	12.00
<input type="checkbox"/> Certified?	Non-Genl Fund	0	0.00	0	0.00	0	0.00
11/01/2020	General Fund	115	115.00	0	0.00	12	12.00
<input type="checkbox"/> Certified?	Non-Genl Fund	0	0.00	0	0.00	0	0.00
10/31/2019	General Fund	10	9.00	80	74.00	0	0.00
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	1	1.00	40	31.00	0	0.00

Save Return to Search Notify

Non-Faculty | Faculty | Totals

**Note:** For Release 1, Agencies enter and certify EPR data in both Cardinal and HuRMan systems

**Navigation:** Navigator > Workforce Administration > EPR Tool



# Creating and Maintaining Position Data (continued)

Faculty tab

[New Window](#) | [Help](#) | [Personalize Page](#)

Non-Faculty | **Faculty** | Totals

Business Unit 14000 Dept of Criminal Justice Svcs

**Employee Position Reports**

Faculty Q | < | << | 1-3 of 25 | >> | > | [View All](#)

Effective Date		Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020	General Fund	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>
<input type="checkbox"/> Certified?	Non-Genl Fund	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>
11/01/2020	General Fund	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>
<input type="checkbox"/> Certified?	Non-Genl Fund	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>
10/31/2019	General Fund	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>

[Save](#) | [Return to Search](#) | [Notify](#)

[Non-Faculty](#) | [Faculty](#) | [Totals](#)



# Creating and Maintaining Position Data (continued)

## Totals tab

[New Window](#) | [Help](#) | [Personalize Page](#)

Non-Faculty | Faculty | **Totals**

Business Unit 14000 Dept of Criminal Justice Svcs

**Employee Position Reports**

**Totals** Q | << < 1-3 of 25 > >> | [View All](#)

Effective Date	MEL	Salaried Headcount	Salaried FTE	Wage Headcount	Wage FTE	Overall Headcount	Overall FTE
12/14/2020	132.00	<input type="text" value="115"/>	<input type="text" value="115.00"/>	<input type="text" value="12"/>	<input type="text" value="12.00"/>	127	127.00
<input type="checkbox"/> Certified?							
11/01/2020	132.00	<input type="text" value="115"/>	<input type="text" value="115.00"/>	<input type="text" value="12"/>	<input type="text" value="12.00"/>	127	127.00
<input type="checkbox"/> Certified?							
10/31/2019	132.00	<input type="text" value="130"/>	<input type="text" value="115.00"/>	<input type="text" value="0"/>	<input type="text" value="0.00"/>	130	115.00
<input checked="" type="checkbox"/> Certified?							

[Non-Faculty](#) | [Faculty](#) | [Totals](#)



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. Agency HR will have the ability to:
  - a) Add, Clone, Update Positions
  - b) Clone Positions only
  - c) Delete Positions



2. What value defaults to unknown on the personal data record?
  - a) Name
  - b) Gender
  - c) Birth date



3. True or False. The Job Record does not require an effective date.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Hiring or Rehiring an Employee

Key Points about the Hire/Rehire business process include:

- Applies to both salaried and wage employees
- Also used when transferring an employee from one agency to another
- Link the employee to New Hire Checklist to guide them through the COVA New Hire tasks
- Job activity and changes viewed on **Job Data** page
  - Stores all current and historical job data related to employee
  - Use Effective Sequencing if multiple transactions with same effective date

## Current Row

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

Employee Empl ID [redacted] Empl Record 0

Work Location Details ? Q | 1 of 2 ▶ ▶▶

\*Effective Date 01/04/2021 📅 Job History Go To Row + -

Effective Sequence 0 \*Action Termination

HR Status Inactive Reason Transfer Out

Payroll Status Terminated \*Job Indicator Primary Job Current ☐

Position Number UMWST01 Q Instructor Override Position Data

Position Entry Date 11/10/2019  Position Management Record

Regulatory Region USA United States

Company UMW University of Mary Washington

Business Unit 21500 University of Mary Washington

Department 203101 Art and Art History

Department Entry Date 11/10/2019

Location CENTR University of Mary Washington

Establishment ID UMW Q University of Mary Washington Date Created 01/07/2021

## History Row

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

Employee Empl ID [redacted] Empl Record 0

Work Location Details ? Q | 2 of 2 ▶ ▶▶

\*Effective Date 11/10/2019 📅 Job History Go To Row + -

Effective Sequence 0 \*Action Hire

HR Status Active Reason New Hire

Payroll Status Active \*Job Indicator Primary Job History ☐

Position Number UMWST01 Q Instructor Override Position Data

Position Entry Date 11/10/2019  Position Management Record

Regulatory Region USA United States

Company UMW University of Mary Washington

Business Unit 21500 University of Mary Washington

Department 203101 Art and Art History

Department Entry Date 11/10/2019

Location CENTR University of Mary Washington

Establishment ID UMW Q University of Mary Washington Date Created 05/06/2020

For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

## Personal Data Information

If a new hire does not have a SSN, (e.g., Foreign Nationals), a temporary number will need to be assigned until the permanent number is received. If the employee will have a VRS record in VNAV, the Agency should contact VRS Employer Services and receive a temporary SSN. The DHRM “Employee Temporary Number Request Form” must be completed and submitted to DHRM iHelp, who will use the temporary number provided by VRS to generate the Employee ID in PMIS. This process will keep Cardinal and VNAV in sync.

If the employee will not have a VRS record in VNAV, then DHRM will provide a temporary SSN starting with 907 and generate the Employee ID in PMIS.

A query has been created to monitor temporary SSNs (these SSNs start with 907) that exist in the Cardinal system (V\_HR\_Monitor Temporary SSNs). For further information on Monitoring Temporary SSN, see the **HR351 Monitoring Temporary SSN**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Prior to completing the new hire or rehire, the Agency HR does an Employee Search Match in Cardinal to find out if the person already exists in the Cardinal system.

- If a match is not found, a new employee ID will be assigned by PMIS. For more information see the **Release 2 Assigning Empl ID** Job Aid found on the Cardinal website in **Job Aids** under **Learning**.
- If a match is found (SSN and Name in system must match new entry), the Agency HR updates the applicable employee job data record.

For agencies with their own HR systems that elect to interface with Cardinal HCM, an upload interface allows agencies to send employee new hire records without an employee ID number. Cardinal then assigns this employee ID number as part of the upload step. This process to complete a new hire upload interface is covered later in this course.



# Hiring or Rehiring an Employee (continued)

The Employee Search Match verifies if an employee currently exists in Cardinal and requires the employee's Social Security Number (National ID). The results drive the Action and Action/Reason used when completing the hire (Hire or Rehire).

The screenshot shows the 'Add a Person' interface in the Cardinal system. At the top left is the Cardinal logo. Below it is a navigation bar with a 'Cardinal Homepage' link and an 'Add a Person' button. The main content area is titled 'Add a Person' and contains a 'Person ID' label next to an empty text input field. Below the input field is a green 'Add Person' button. At the bottom of the form is a blue link labeled 'Search for Matching Persons', which is highlighted with a red rectangular box.

**Note:** For further information on Employee Search Match, refer to the Job Aid titled **HR351 Employee Search Match**. It can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

The Employee Search Match verifies if an employee currently exists in Cardinal and requires the employee's Social Security Number (National ID). The results drive the Action and Action/Reason used when completing the hire (Hire or Rehire).

### Search Criteria

Search Type Person  Ad Hoc Search

Search Parameter PSRS\_HIRE Prepare For Hire

#### Search Result Rule <sup>?</sup>

Search Result Code PSRS\_HIRE x  Prepare For Hire

User Default

### Search Criteria <sup>?</sup>

Search Fields	Value
National Id	<input type="text"/>

### Search by Order Number <sup>?</sup>

Search Order	Description
10	NID Only

**Note:** For further information on Employee Search Match, refer to the Job Aid titled **HR351 Employee Search Match**. It can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

The Employee Search Match verifies if an employee currently exists in Cardinal and requires the employee's Social Security Number (National ID). The results drive the Action and Action/Reason used when completing the hire (Hire or Rehire).

### Search Criteria

Search Type: Person  Ad Hoc Search

Search Parameter: PSRS\_HIRE Prepare For Hire

#### Search Result Rule ?

Search Result Code:  Prepare For Hire

User Default

#### Search Criteria ?

Search Fields	Value
National Id	<input type="text" value="123457894"/>

#### Search by Order Number ?

Search Order	Description
10	NID Only

**Note:** For further information on Employee Search Match, refer to the Job Aid titled **HR351 Employee Search Match**. It can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

The Employee Search Match verifies if an employee currently exists in Cardinal and requires the employee's Social Security Number (National ID). The results drive the Action and Action/Reason used when completing the hire (Hire or Rehire).

[New Window](#) | [Help](#)

### Search Results

Search Type Person  Ad Hoc Search

Search Parameter PSRS\_HIRE Prepare For Hire

Result Code PSRS\_HIRE Prepare For Hire

▼ **Search Results Summary**

Number of ID's Found	1	
Search Order Number	10	NID Only

[Return to Search Criteria](#)

▼ **Search Results**

		Empl ID	Last Name	First Name	Middle Name			
1	<input type="button" value="Carry ID"/>					<a href="#">Person Organizational Summary</a>	<input type="button" value="+"/>	<input type="button" value="-"/>

**Note:** For further information on Employee Search Match, refer to the Job Aid titled **HR351 Employee Search Match**. It can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

The Employee Search Match verifies if an employee currently exists in Cardinal and requires the employee's Social Security Number (National ID). The results drive the Action and Action/Reason used when completing the hire (Hire or Rehire).

**Person Organizational Summary**

Person ID [REDACTED]

▼ **Employment Instances** 1 of 1 [View All](#)

ORG Instance 0      Last Hire 06/10/2020      Termination Date 06/10/2020  
 HR Status Inactive      Payroll Status Terminated

**Assignments** 1-1 of 1

Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Job Code	Grade	Benefits Status
0	Inactive	Terminated	06/11/2020	71800	06/10/2020	Classified Salary	06/10/2020	91512	6	Active

[Return to Search](#) [Notify](#)

**Note:** For further information on Employee Search Match, refer to the Job Aid titled **HR351 Employee Search Match**. It can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

After completing the employee search match, if an employee id was not found go to the PMIS PSE300 screen to complete the new hire and receive an employee id number. Make a note of the PMIS Employee ID number and complete the new hire the next day.

Cardinal

Cardinal Homepage Add a Person

Add a Person

Person ID

Add Person

Search for Matching Persons

**Note:** This process is for Release 1 & 2 Agencies **ONLY**. Once Release 3 is rolled out, Cardinal will assign all Empl IDs automatically.



# Hiring or Rehiring an Employee (continued)

New Window | Help | Personalize Page

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

Person ID [blurred]

Name [Search icon] | [Navigation icons] | 1 of 1 [Dropdown] | [Navigation icons] | View All

*Effective Date	02/05/2021 [Calendar icon]	[+]	[-]
*Format Type	English [Dropdown]		
Display Name		Add Name	



# Hiring or Rehiring an Employee (continued)

Name ×

[Help](#)

**English Name Format**

Name Prefix

\*First Name

Middle Name

\*Last Name

Name Suffix

Display Name

Formal Name

Name



# Hiring or Rehiring an Employee (continued)

Font: English

Display Name

### Biographic Information

Date of Birth	<input type="text"/>	Years	0	Months	0
Birth Country	USA			United States	
Birth State	<input type="text"/>				
Birth Location	<input type="text"/>			<input type="checkbox"/> Exclude Contact Information?	

### Biographical History

1 of 1 | View All

*Effective Date	02/05/2021	<input type="button" value="+"/>	<input type="button" value="-"/>
*Gender	Unknown		
*Highest Education Level	Not Indicated		
*Marital Status	Unknown		
Language Code	<input type="text"/>	As of	<input type="text"/>
Alternate ID	<input type="text"/>		
<input type="checkbox"/> Full-Time Student			



# Hiring or Rehiring an Employee (continued)

▼ National ID

1-1 of 1 | View All

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

Save Notify Refresh Add Update/Display Include History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

**Note:** The **National ID** field is required for all employees. During release 1 and 2 the employee id and social security number must be entered in PMIS and will then interface to Cardinal each night. The new hire or rehire can not be completed until this overnight process completes to success. Employees without a Social Security Number (SSN) are assigned a temporary number until a permanent SSN is received. For further information on Monitoring Temporary SSN, see the **HR351 Monitoring Temporary SSN**. This Job Aid can be found on the Cardinal website in **Job Aid** under **Learning**.



# Hiring or Rehiring an Employee (continued)

[New Window](#) | [Help](#) | [Personalize Page](#)

[Biographical Details](#) | **Contact Information** | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

Empl ID [redacted]

### Current Addresses

1-1 of 1 | [View All](#)

Address Type	As Of Date	Status	Address			
Home	11/01/2020	A		<a href="#">Add Address Detail</a>	<input data-bbox="1602 725 1664 778" type="button" value="+"/>	<input data-bbox="1694 725 1756 778" type="button" value="-"/>

**Note:** The state selected as part of the address has a direct impact on benefit options and payroll taxes.



# Hiring or Rehiring an Employee (continued)

New Window | Help | Personalize Page

## Address History

Address Type Home

Address History		1 of 1
*Effective Date	11/01/2020	Address
Country	USA	
*Status	A	
<a href="#">Add Address</a>		

OK Cancel Refresh

**Note:** The state selected as part of the address has a direct impact on benefit options and payroll taxes.



# Hiring or Rehiring an Employee (continued)

[New Window](#) | [Help](#) | [Personalize Page](#)

## Edit Address

Country United States

Address 1

Address 2

Address 3

City  State

Postal

County

**Note:** The state selected as part of the address has a direct impact on benefit options and payroll taxes.



# Hiring or Rehiring an Employee (continued)

The **Phone Information** section is required but does not have to be accurate/unique.

- Obtain and enter employee's accurate Phone Type and Telephone Number if possible

The Virginia Information Technologies Agency's (VITA) cloud-based Identify Access Management tool (Okta) authenticates agency users and requires valid email address.

- Preferred email address required to ensure all employees (active and inactive) have consistent access

The screenshot displays the Okta user management interface with a torn paper effect. It is divided into three main sections:

- Phone Information:** A table with columns for \*Phone Type, Telephone, Extension, Preferred, and two empty columns. The Preferred column contains a checkbox. Navigation controls at the top right show '1-1 of 1' and 'View All'.
- Email Option Selection:** A horizontal row of three radio buttons: 'Agency Provided Email' (selected), 'Pending Agency Provided Email', and 'Employee Provided Email'.
- Email Addresses:** A table with columns for \*Email Type, \*Email Address, Preferred, and two empty columns. The Preferred column contains a checkbox.



# Hiring or Rehiring an Employee (continued)

Employees can identify as multiple ethnic groups, which helps drive multiple reports and initiatives.

Biographical Details | Contact Information | **Regional** | VA Person Info

Person ID [REDACTED]

USA

### Ethnic Group

Regulatory Region: USA United States  
Ethnic Group: BLACK Black/African American  
 Primary

### History

Effective Date: 04/10/2019  
Date Entitled to Medicare: 08/01/2056  
Citizenship (Proof 1):  
Citizenship (Proof 2):  
 Eligible to Work in U.S.

### Veteran

Military Status: Not indicated  
Military Discharge Date: Edit Discharge Date



# Hiring or Rehiring an Employee (continued)

To add an Employee Relationship:

1. Select the **Employee** checkbox
2. Select “**Hire**” from the **Select Checklist Code** drop-down menu
3. Click the **Add Relationship** button

[New Window](#) | [Help](#) | [Personalize Page](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | **Organizational Relationships** | [VA Person Info](#)

Person ID [redacted]

**Choose Org Relationship to Add**

**Employee**

Contingent Worker

Person of Interest

Select Checklist Code [dropdown] [arrow]

**Add Relationship**

[Save](#) | [Notify](#) | [Refresh](#) | [Add](#) | [Update/Display](#) | [Include History](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)



# Hiring or Rehiring an Employee (continued)

Key points about the Hire/Rehire business process include:

- Effective date represents hire or rehire date (can be future dated)
- Effective date must be greater than or equal to effective date of Personal Data entered
- Action/Action Reason describes hire/rehire reason
  - Action activates HR and Payroll statuses
  - Reason activates Benefits status
- Shared position data populates throughout employee's Job Record
- Enter additional fields (e.g., employee class, pay group, frequency, compensation) on **Job Data** page
- If employee has multiple jobs, they have employee ID with multiple employee records
- Interface determines correct employee record number based upon agency, position, and employee type (for interfacing agencies)

**Note:** The Action/Reason, Employee Class, and Job Code are key fields in the VRS file nightly extract from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if the incorrect data is entered.

For a further information on Action/Action Reason combinations and a PMIS Code Crosswalk, refer to the Job Aid titled **HR351 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on hiring an employee, see the job aid titled **HR351 Completing a New Hire**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

## Job Data – Work Location

New Window | Help | Personalize Page

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

Employee [redacted] Empl ID [redacted]  
Empl Record 0

Work Location Details ? 1 of 1

\*Effective Date 11/01/2020 Go To Row + -

Effective Sequence 0

HR Status Active

Payroll Status Active

\*Action Hire

Reason

\*Job Indicator Primary Job

Calculate Status and Dates

Position Number Current

Override Position Data

Position Entry Date

Position Management Record

For further information on Action Reasons, see the Job Aid titled **HR351 Action Reason Table**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Hiring or Rehiring an Employee (continued)

## Job Data – Job Information

[New Window](#) | [Help](#) | [Personalize Page](#)

[Work Location](#) | **[Job Information](#)** | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Employee [Redacted]      Empl ID [Redacted]  
 Empl Record 0

---

**Job Information Details** ? Q | | < > 1 of 1 > >

Effective Date 11/01/2020 **Go To Row**  
 Effective Sequence 0      Action Hire  
 HR Status Active      Reason New Hire  
 Payroll Status Active      Job Indicator Primary Job

Current

---

Job Code 69113      Security Officer III  
 Entry Date 11/01/2020      SOC Code  
 Supervisor Level      Supervisor Name  
 Reports To DOCHR001      Test-Director of Corrections [Redacted]  
 Regular/Temporary Regular      Full/Part Full-Time  
**Empl Class**        \*Officer Code    
 Regular Shift Not Applicable      Shift Rate   
 Classified Ind Classified      Shift Factor

---

**Standard Hours** ?

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



# Hiring or Rehiring an Employee (continued)

## Job Data – Payroll

[New Window](#) | [Help](#) | [Personalize Page](#)

[Work Location](#) | [Job Information](#) | [Job Labor](#) | **Payroll** | [Salary Plan](#) | [Compensation](#)

Employee [Redacted]      Empl ID [Redacted]  
Empl Record 0

---

**Payroll Information** ? Q | 1 of 1 ▶▶

Effective Date 11/01/2020 **Go To Row**

Effective Sequence 0      Action Hire

HR Status Active      Reason New Hire

Payroll Status Active      Job Indicator Primary Job

Current 📄

\*Payroll System Payroll for North America ▼

Absence System Other ▼

**Payroll for North America** ?

Pay Group  Q

Employee Type  Q

Tax Location Code  Q

GL Pay Type

Combination Code

Holiday Schedule  Q

FICA Status Subject ▼

[Edit ChartFields](#)



# Hiring or Rehiring an Employee (continued)

## Job Data – Payroll

Current

\*Payroll System

Absence System

**Payroll for North America** [?](#)

Pay Group   Semimonthly Class (SATFRI07)

Employee Type   Salaried

Holiday Schedule   Sal.HolSch

Tax Location Code   Richmond (City)

GL Pay Type

FICA Status

Combination Code [Edit ChartFields](#)

**Absence Management System**

Pay Group   Semi-monthly Classified

**Setting**

- Use Pay Group Eligibility
- Use Pay Group Rate Type
- Use Pay Group As Of Date

Eligibility Group

Exchange Rate Type

Use Rate As Of



# Hiring or Rehiring an Employee (continued)

## Job Data – Salary Plan

New Window | Help | Personalize Page

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Salary Plan Details** ? Q | ⏪ ⏩ 1 of 1 ⏪ ⏩

Effective Date	11/01/2020			<b>Go To Row</b>
Effective Sequence	0	Action	Hire	
HR Status	Active	Reason	New Hire	
Payroll Status	Active	Job Indicator	Primary Job	

---

<b>Salary Admin Plan</b>	SW	Statewide	
Grade	4	Statewide Salary Grade 4	Grade Entry Date 11/01/2020
Step			Step Entry Date

Includes Wage Progression Rule

Current

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

**OK** | Cancel | Apply Refresh

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



# Hiring or Rehiring an Employee (continued)

## Job Data – Compensation

[New Window](#) | [Help](#) | [Personalize Page](#)

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

Employee [redacted] Empl ID [redacted]  
Empl Record 0

**Compensation Details** ? Q | 1 of 1 ▼ ▶ ▶▶

Effective Date 11/01/2020 **Go To Row**

Effective Sequence 0 Action Hire

HR Status Active Reason New Hire

Payroll Status Active Job Indicator Primary Job

Current

**Compensation Rate** 0.000000 **\*Frequency** A Q Annual

▶ **Comparative Information** ?

▶ **Pay Rates** ?

**Default Pay Components**

**Pay Components** ? Q | 1-1 of 1 ▼ ▶ ▶▶

**Amounts** | Controls | Changes | Conversion | ▶▶

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0					+	-

**Calculate Compensation**

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

**OK** | Cancel | Apply **Refresh**

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



# Hiring or Rehiring an Employee (continued)

## Job Data – Employment Data (Waged Employee)

Wage employee – the Person Employment Dates box does not populate

New Window | Help | Personalize Page

**Employment Information**

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Organizational Instance** ?

Organizational Instance Rcd	0	Original Start Date	01/01/2019	<input type="checkbox"/> Override	
Last Start Date	01/01/2019	First Start Date	01/01/2019		
Termination Date		Years	Months	Days	
Org Instance Service Date	01/01/2019	<input type="checkbox"/> Override	2	1	17

**Organizational Assignment Data** ?

**Instance Record**

Last Assignment Start Date	01/01/2019	First Assignment Start	01/01/2019		
Assignment End Date					
Home/Host Classification	Home	Years	Months	Days	Time Reporter Data
Company Seniority Date	<input type="checkbox"/> Override	0	0	0	
Benefits Service Date	01/01/2019	<input type="checkbox"/> Override	2	1	17
Seniority Pay Calc Date	01/01/2019	<input type="checkbox"/> Override	2	1	17
Probation Date	<input type="text"/>				
Professional Experience Date	<input type="text"/>	Last Verification Date	<input type="text"/>		
Business Title	Work Order Clerk	Position Phone			
*Work Mode	Office/Facility Worker	Tenure Status/Contract Type			
Alternate Leave Plan	<input type="text"/>	<input type="checkbox"/> Alternate Work Schedule			
VSDP Effective Date	01/01/2019				
Agency Use Field 1	<input type="text"/>	Agency Use Field 2	<input type="text"/>	Agency Use Field 3	<input type="text"/>

USA

Job Data    Employment Data    Earnings Distribution    Benefits Program Participation

Save    Return to Search    Previous in List    Next in List    Notify    Refresh    Update/Display    Include History



# Hiring or Rehiring an Employee (continued)

## Job Data – Employment Data

Salaried employee – the Person Employment Date box populates – HR Admin updates

New Window | Help | Personalize Page

Employee [redacted] Empl ID [redacted]  
Empl Record [redacted]

**Employment Information**

**Organizational Instance** ?

Organizational Instance Rcd 0 Original Start Date  Override  
Last Start Date First Start Date  
Termination Date Years Months Days  
Org Instance Service Date  Override 0 0 0

**Organizational Assignment Data** ?

**Instance Record**

Last Assignment Start Date 02/05/2021 First Assignment Start 02/05/2021  
Assignment End Date  
Home/Host Classification Home Years Months Days Time Reporter Data  
**Company Seniority Date**  Override 0 0 0  
Benefits Service Date  Override 0 0 0  
Seniority Pay Calc Date  Override 0 0 0  
**Probation Date** [calendar icon]  
Professional Experience Date [calendar icon] Last Verification Date [calendar icon]  
Business Title Security Officer III Position Phone  
\*Work Mode Office/Facility Worker Tenure Status/Contract Type  
Alternate Leave Plan [calendar icon]  Alternate Work Schedule  
VSDP Effective Date [calendar icon]  
Agency Use Field 1 Agency Use Field 2 Agency Use Field 3

**Person Employment Dates** ?

**Continuous State Service Date** [calendar icon]  
**Leave Eligibility Service Date** [calendar icon]  
Previous Months Of Service

USA

Job Data Employment Data Earnings Distribution Benefits Program Participation

OK Cancel Apply Refresh



# Hiring or Rehiring an Employee (continued)

## Job Data Information – Benefits Program Participation

New Window | Help | Personalize Page

**Benefit Program Participation**

Employee [redacted] Empl ID [redacted]  
Empl Record 0

---

**Benefit Status** ? 1 of 1

Benefit Record Number 0 ↻ Go To Row

Effective Date 11/01/2020  
 Effective Sequence 0      Action Hire  
 HR Status Active      Reason New Hire  
 Payroll Status Active      Job Indicator Primary Job

\*Benefits System Benefits Administration Current ☐  
 Annual Benefits Base Rate  USD ACA Eligibility Details Benefits Employee Status Active

**Benefits Administration Eligibility** ?

BAS Group ID  Q

Elig Fld 1  Q      Elig Fld 2  Q      Elig Fld 3  Q  
 Elig Fld 4       Elig Fld 5       Elig Fld 6   
 Elig Fld 7       Elig Fld 8  Q      Elig Fld 9  Q

---

**Benefit Program Participation Details** ? 1 of 1 View All

\*Effective Date 11/01/2020 📅      Currency Code USD + -  
 \*Benefit Program PSX Q      Sys delivered empty Ben Pgm

---

Job Data      Employment Data      Earnings Distribution      Benefits Program Participation

OK Cancel Apply Refresh



# Hiring or Rehiring an Employee (continued)

Navigation: Navigator > Workforce Administration > Personal Information > Citizenship > Identification Data

[New Window](#) | [Help](#) | [Personalize Page](#)

Citizenship/Passport

Person ID

Citizenship/Passport ⓘ

\*Country 🔍

Citizenship Status ▾

Go To Row + -

1 of 1 ▾



# Hiring or Rehiring an Employee (continued)

The chart below outlines the criteria for using the three possible data entry methods:

	Online Entry	Mass Upload	Interface
<b>Data Source</b>	Entered by user	User-populated Excel template loaded by agencies, SPO, or PPS (as applicable)	System to system
<b>Data Volume</b>	Low to moderate volume	High volume	High volume
<b>Frequency</b>	Ad-hoc, Still adhere to payroll calendar	Ad-hoc, infrequent, Still adhere to payroll calendar	Ongoing, through scheduled batch processing
<b>Data Validation</b>	Invokes all online edits and validations	Invokes all online edits and validations	Invokes all online edits and validations
<b>Error Handling</b>	Data errors are addressed during real-time data entry	Rudimentary error reporting by row number only. Errors must be manually keyed into Cardinal or fixed in Excel and reloaded	Detailed errors are listed in error report and must be fixed in the source system or manually keyed into Cardinal



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. The Agency HR enters the following information on the Personal Data for the new Employee
  - a) SSN, birth date, name, business email address
  - b) Position and Job information
  - c) Compensation



2. The Agency HR enters the following information on the Job Data for the new Employee
  - a) SSN, birth date, name, business address
  - b) Position, Job information, Compensation
  - c) Payroll Paysheet



3. True or False. The Agency HR uses a New Hire Checklist to guide them through the new hire process.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Approving Employee Self Service Transactions

After reviewing required name change documentation the Agency HR Administrator navigates to the **Approvals** page to approve or deny submitted name changes.



The screenshot shows the 'Cardinal Homepage' dashboard. The 'Approvals' tile is highlighted with a red border and contains an icon of a document with a green checkmark and the number '1'. Other tiles include 'Cardinal Message Board' (0 messages published today, 0 total active messages), 'Cardinal Portal' (calendar icon), 'Name Changes' (table with columns Empl ID, Name, More...), 'Return From Leave' (table with columns Empl ID, Name, Return, More...), 'Personal Details' (person icon), and 'Job Summary' (document and briefcase icon).

**Navigation:** Cardinal Homepage > Approvals tile






# Approving Employee Self Service Transactions (continued)

Agency HR Pending Approval listing.

View By		Type	
	All	<span>1</span>	
	Name Change	<span>1</span>	

				1 row
<b>Name Change</b>	To		Routed	
	Effective	01/21/2021	01/21/2021	



# Maintaining Employee Data (continued)

## Specific Name Change submission

---

**Summary**

Effective From 12/01/2020 Employee ID [REDACTED]  
Name Format English

**Proposed Changes**

Name	After Approval	Before Approval
Last Name	[REDACTED]	[REDACTED]
Display Name	[REDACTED]	[REDACTED]
Formal Name	[REDACTED]	[REDACTED]
Name	[REDACTED]	[REDACTED]

**▼ Change Request Details**

Name Change Details >

**Approver Comments**

[REDACTED]

Approval Chain >



# Maintaining Employee Data (continued)

Agency HR Submit Approval

**Approve**

You are about to approve this request.

**Approver Comments**



# Maintaining Employee Data (continued)

Agency HR saved approved transaction.

← Pending Approvals Pending Approvals Home Search Menu Refresh

You have approved the request. ×

🌐 All 0

--	--



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Intra-Agency Transfer

- Movement of employee from one position to another within the same Agency
- Agency HR updates employee's **Job Data** page and all applicable data fields (e.g., compensation)
- **Action** and **Action Reason** fields maintain active HR and Payroll Statuses
- When completing a change from a wage position to another wage position it is no longer necessary to terminate the wage/hourly employee and rehire them into a new wage/hourly position. To complete this type of transaction HR Admin will simply insert a row and select Action of Transfer and the applicable Reason. Use the Configuration Workbook to determine the appropriate Reason.
- If moving an employee from a Salary position to a Wage position or a Wage position to a Salary position, the Action/Reason for the movement **out** of the position is **Termination/Resignation**.
- If moving an employee from a Salary position to a Wage or a Wage position to a Salary position, the Action/Reason for the movement **into** the new position is **Hire/New Hire**. This movement requires the agency to add a new employee instance (employee record) during the Hire process.

Be mindful that the Benefits Administrator will need to re-elect benefit elections of the employee once the transfer process to the receiving agency is complete. See Job Aid titled **361 Benefits Quick Reference Guide** for more details. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For detailed information on Intra-Agency Transfers, see the Job Aid titled **HR351 Intra-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Intra-Agency Transfer (continued)

Navigation: Navigator > Workforce Administration > Job Information > Job Data

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

Work Location Details ? 1 of 2

\*Effective Date 11/01/2020 📅 Go To Row + -

Effective Sequence 0

HR Status Active

Payroll Status Active

\*Action Transfer ▼

Reason Promotion ▼

\*Job Indicator Primary Job ▼

Position Number DLS00005 🔍 Senior Associate Current

Override Position Data

Position Entry Date 09/10/2006  Position Management Record

Regulatory Region USA United States

Company DLS Div of Legislative Services

Business Unit 10700 Div of Legislative Services

Department 10700 Div of Legislative Svcs Dept

Department Entry Date 09/10/2006

Location CENTR Division of Legislative Servic

Establishment ID DLS 🔍 Division of Legislative Servic Date Created 12/10/2020



# Updating Employee Compensation

- Employee Job Record Pay Components:
  - State salary
  - Non-state salary
  - Special pay SPPAY Special Rate Compensation
  - Hourly rate
- Compensation parameters (i.e., Pay Bands) only overridden by DHRM
  - Errors if pay rate exceeds limits
  - Discipline pay rate changes at least 5%
- Submit mass uploads (e.g., Agency-wide compensation actions) to PPS for uploads
- Bonuses not tracked/paid through Employee Job Record (covered later in course)
- Payroll Administrator runs reports and queries for reconciliation process

For further details on Employee Compensation Changes, see the Job Aid titled **HR351 How to Change/Update Employee Compensation**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further details on Rewards and Recognitions, see the Job Aid titled **HR351 Rewards and Recognitions**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further details on how to complete a mass upload see the Job Aid titled **HR351 Mass Update**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Updating Employee Compensation (continued)

New Window | Help | Personalize Page

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Work Location Details** ?

\*Effective Date: 02/12/2021 [Calendar Icon]

Effective Sequence: 0

HR Status: Active

\*Action: Pay Rate Change [Dropdown]

Reason: Competitive Salary Offer [Dropdown]

Go To Row [Button] + - [Buttons]

**Pay Components** ?

Amounts | Controls | Changes | Conversion ||>

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 STATE [Search]	0	55,000.000000 [Currency]	USD [Search]	A [Search]		+ [Button]	- [Button]

Calculate Compensation [Button]



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. Intra-Agency Transfer refers to the movement of an employee from one position to another within the same agency.  
True or False.



2. Additional job data (e.g., compensation) fields are updated, as applicable.  
True or False.



3. If moving an employee from a Salary position to a Wage position the Action/Reason for the movement **out** of the position is **Termination/Resignation**.  
True or False.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Inter-Agency Transfer

An Inter-Agency Transfer is defined as the movement of an employee from one Agency to another Agency.

Verify that all necessary data is in hand prior to moving forward with keying the transfer transaction. Agency HR will verify that the correct position number is known and that the position includes the correct job code, title, and location code. The position will default the applicable salary plan and grade.

Agency HR updates the employee's job data.

The sending and receiving agencies coordinate the effective date of the termination (sending) and the effective date of the hire (receiving). The Action/Reasons "**Transfer Out**" and "**Transfer In**" ensure the employee maintains an active Benefits Status.

The receiving agency adds a new employee instance (employee record) during the Hiring process. If the employee is returning to an agency, use the employee's original employee record from that agency during rehire transaction.

The Action/Reason of "Transfer In" reactivates the employee's HR and Payroll Status after they are terminated by the sending agency. The coordinated effective date ensures the employee does not experience a break in service.

Update additional job data (e.g., compensation) information, as applicable.

Be mindful that the Benefits Administrator will need to re-elect benefit elections of the employee once the transfer process to the receiving agency is complete. See Job Aid titled **361 Benefits Quick Reference Guide** for more details. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Inter-Agency Transfers, see the Job Aid titled **HR351 Inter-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Inter-Agency Transfer (continued)

The Sending Agency selects “Termination” from the **Action** field drop-down menu and “Transfer Out” from the **Reason** field drop-down menu.

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

Work Location Details ?

\*Effective Date 01/04/2021 | Job History | Go To Row + -

Effective Sequence 0

HR Status Inactive | \*Action Termination

Payroll Status Terminated | Reason Transfer Out

\*Job Indicator Primary Job

Position Number UMWST01 | Instructor | Current

Override Position Data

Position Entry Date 11/10/2019 | Position Management Record

Regulatory Region USA | United States

Company UMW | University of Mary Washington

Business Unit 21500 | University of Mary Washington

Department 203101 | Art and Art History

Department Entry Date 11/10/2019

Location CENTR | University of Mary Washington

Establishment ID UMW | University of Mary Washington

Date Created 01/07/2021



# Inter-Agency Transfer (continued)

The Receiving Agency selects “Hire” from the **Action** field drop-down menu and “Transfer In” from the **Reason** field drop-down menu.



# Inter-Agency Transfer (continued)

The Receiving Agency manually updates the employee's **Leave Service Eligibility Date** and **Continuous State Service Date** fields, which populate the **Company Seniority Date** field.

Employment Information New Window | Help | Personalize Page

Employee Empl ID [redacted]  
Empl Record 1

Organizational Instance ?

Organizational Instance Rcd	1	Original Start Date	12/15/2020	<input type="checkbox"/> Override	
Last Start Date	12/15/2020	First Start Date	12/15/2020		
Termination Date		Years	Months	Days	
Org Instance Service Date	12/15/2020	<input type="checkbox"/> Override	0	1	19

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date	12/15/2020	First Assignment Start	12/15/2020		
Assignment End Date					
Home/Host Classification	Home	Years	Months	Days	Time Reporter Data
Company Seniority Date		<input type="checkbox"/> Override	0	0	0
Benefits Service Date	12/15/2020	<input type="checkbox"/> Override	0	1	19
Seniority Pay Calc Date	12/15/2020	<input type="checkbox"/> Override	0	1	19

Probation Date

Professional Experience Date

Last Verification Date

Business Title: Regional Health Director  
Position Phone:

\*Work Mode: Office/Facility Worker  
Tenure Status/Contract Type:

Alternate Leave Plan   Alternate Work Schedule

VSDP Effective Date

Agency Use Field 1  Agency Use Field 2  Agency Use Field 3

Person Employment Dates ?

Continuous State Service Date	<input type="text"/>
Leave Eligibility Service Date	<input type="text"/>
Previous Months Of Service	<input type="text"/>

USA

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

**Save** | Return to Search | Notify | Refresh | Update/Display | Include History

Employment Information New Window | Help | Personalize Page

Employee Empl ID [redacted]  
Empl Record 1

Organizational Instance ?

Organizational Instance Rcd	1	Original Start Date	12/15/2020	<input type="checkbox"/> Override	
Last Start Date	12/15/2020	First Start Date	12/15/2020		
Termination Date		Years	Months	Days	
Org Instance Service Date	12/15/2020	<input type="checkbox"/> Override	0	1	19

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date	12/15/2020	First Assignment Start	12/15/2020		
Assignment End Date					
Home/Host Classification	Home	Years	Months	Days	Time Reporter Data
Company Seniority Date	11/15/2020	<input type="checkbox"/> Override	0	0	0
Benefits Service Date	12/15/2020	<input type="checkbox"/> Override	0	1	19
Seniority Pay Calc Date	12/15/2020	<input type="checkbox"/> Override	0	1	19

Probation Date

Professional Experience Date

Last Verification Date

Business Title: Regional Health Director  
Position Phone:

\*Work Mode: Office/Facility Worker  
Tenure Status/Contract Type:

Alternate Leave Plan   Alternate Work Schedule

VSDP Effective Date

Agency Use Field 1  Agency Use Field 2  Agency Use Field 3

Person Employment Dates ?

Continuous State Service Date	11/15/2020
Leave Eligibility Service Date	11/15/2020
Previous Months Of Service	<input type="text"/>

USA

Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

**Save** | Return to Search | Notify | Refresh | Update/Display | Include History



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. True or False. Inter-Agency Transfer refers to the movement of an employee from one Agency to another Agency.



2. True or False. The Action/Action Reason the receiving agency uses maintains an active HR Status and an active Payroll Status (if applicable).



3. True or False. The employee stays in the same position when an Inter-Agency Transfer is completed.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Maintain Leave Status (Paid and Unpaid)

- Place **SALARIED** employees in paid or unpaid leave status
  - Hourly employees generally not eligible for leave
- Keyed manually or loaded via Mass Upload Process
- Continue to examine change in status and work with employee to complete documentation
- Within Cardinal:
  - Link the employee to the Leave of Absence Checklist
  - Add a row to change the employee's status to Leave of Absence
  - Add a row to update the pay group to non-paying effective the first day of the following pay period
  - If needed, add a row to extend the employee's expected return date
  - Add a row to return the employee from leave
  - Add a row to update the pay group to original the pay group effective the first day of the following pay period
- Use Job Record Notepad to capture non-confidential comments or further explain transactions

For further information on Managing Leaves of Absence, see the Job Aid titled **HR351 Managing Leave of Absence**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Maintain Leave Status (continued)

## Leave of Absence (Paid)

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

Work Location Details ?

\*Effective Date: 11/01/2020  
Effective Sequence: 0

HR Status: Active  
Payroll Status: Leave With Pay

\*Action: Paid Leave of Absence  
Reason: Personal  
\*Job Indicator: Primary Job

Position Number: DLS00005 Senior Associate  
Position Entry Date: 09/10/2006  
Regulatory Region: USA United States  
Company: DLS Div of Legislative Services  
Business Unit: 10700 Div of Legislative Services  
Department: 10700 Div of Legislative Svcs Dept

## Leave of Absence (Unpaid)

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

Work Location Details ?

\*Effective Date: 11/01/2020  
Effective Sequence: 0

HR Status: Active  
Payroll Status: Leave of Absence

\*Action: Leave of Absence - Unpaid  
Reason: FMLA - EE Medical  
\*Job Indicator: Primary Job

Position Number: DLS00005 Senior Associate

**Navigation:** Navigator > Workforce Administration > Job Information > Job Data



# Maintain Leave Status (continued)

Example of Notepad functionality - Use as you would have used it on the PMIS screen.

New Window | Help | Personalize Page

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

Employee [Redacted]      Empl ID [Redacted]  
Empl Record 0

**Work Location Details** ?      🔍 | ⏪ | ⏩ | 1 of 2 | ⏪ | ⏩


*Effective Date	02/08/2021	<b>Go To Row</b>	<b>+</b>	<b>-</b>
Effective Sequence	0	*Action	Paid Leave of Absence ▾	
HR Status	Active	Reason	FMLA ▾	
Payroll Status	Leave With Pay	*Job Indicator	Primary Job ▾	
Position Number	CJS00400 🔍	Current		

Custom Service Specialist



# Maintain Leave Status (continued)

Notepad functionality

 **Selected Note**

► **Instructions**

**Add Performance Note**



**Applications**

Employee ID	██████████	██████████	Created	12/11/2020 3:56PM
Empl Rcd Nbr	0		Creator	██████████
Effective Date	2020-12-11		Last Update	
Effective Sequence	0		Updated By	

---

Subject

Note Text



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. True or False. The Agency HR uses the Notepad functionality to document other non-confidential Leave Status information.



2. True or False. The Agency HR is required to insert a row on the Job Record to place the employee on Leave.



3. True or False. The Agency HR is required to insert a row to return the employee from Leave of Absence.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Separate Employee

Types of **Separations** covered in this section of the course:

## **Involuntary**

- Termination is an employee's involuntary termination from state service. Examples include Layoff, Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.

## **Voluntary**

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

Voluntary and Involuntary separations are keyed to inactivate the employee record. Action/Action Reasons are used to reflect the type of separation.

There are two Action Reason combinations related to an employee's death. One is Termination/Death, and the other is Termination/Death with Dependent. The difference between the two events is that the benefits terminate on different dates. When an employee passes away, the Benefit Administrator should review the employee's current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination.

After the Termination transaction is saved, all HCM functional areas are updated appropriately:

- Benefits status is updated in Cardinal Benefits (BN); COBRA eligibility is triggered if applicable.
- Time Reporter is updated for Cardinal TA. Productive and non-productive time can still be entered and approved prior to the effective date of the Layoff. The updated HR status stops leave accruals.
- The updated Payroll status does not create a Paysheet for the employee.



## Separate Employee (continued)

- Effective date of Termination transactions is generally the day immediately following last day worked
  - Example: If employee last worked on Friday, Termination Effective Date is Saturday
- Link employee to Termination Checklist to guide through the termination process
- Update email address in Personal Data to the employee's personal email address and mark it as Preferred.

The employee email address must be updated in Cardinal after separation in order for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. The HR Administrator obtains the personal email address and updates the email address in Cardinal from Agency Provided to Employee Provided. Agency HR must also check the personal email address as Preferred. Selecting this email address as preferred is the driving factor for post-employment system access. Separated employees will then have access to Cardinal for 18 months after the Termination Date. After 18 months, this access ends automatically. Agency HR does not need to go back in and remove the personal email address.

For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Separating Employees, see the Job Aid titled **HR351 Separation Statues**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on the Layoff Process, see the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Separate Employee (continued)

New Window | Help | Personalize Page

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

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Work Location Details** ? 1 of 2

<b>*Effective Date</b> 02/12/2021	<b>Go To Row</b> <span>+</span> <span>-</span>
Effective Sequence <input type="text" value="0"/>	<b>*Action</b> Termination <span>▼</span>
<b>HR Status</b> Inactive	<b>Reason</b> Resignation <span>▼</span>
<b>Payroll Status</b> Terminated	<b>*Job Indicator</b> Primary Job <span>▼</span>

Position Number  State Eng Materials Current

Position End Date 12/31/2020



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. True or False. Examples of Involuntary Termination include Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.



2. True or False. Examples of Voluntary Termination include Resignation, Retirement, and Death.



3. True or False. The effective date of a termination is the day after the last day worked.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Mass HR Data Maintenance

- Agencies load large volumes of data to Cardinal using Excel-based mass upload tool
  - Lacks detailed error reporting capability, so use infrequently

The following list identifies entities responsible for running mass upload processes in Cardinal:

	<b>Mass Upload Data Types</b>	<b>Loaded by Agency</b>	<b>Loaded by SPO</b>	<b>Loaded by PPS</b>
	Position Data			X
	Position Default Funding	X		
	Job Data			X
	New Hires			X
	Performance Ratings	X		
	Rewards and Recognition	X		
	Leave Balance Adjustments	X		
	Additional Pay	X		
	General Deductions		X	



# Lesson Summary

3

## Setup and Maintain Employee HR Data

In this lesson, you learned:

- How to create and maintain position data
- How to Hire/Rehire employee
- How to approve proposed employee self service actions (Changes to Marital Status, Name, Address)
- How to complete an Intra-Agency Transfer
- How to complete an Inter-Agency Transfer
- How to maintain employee leave status
- How to separate an employee



# Lesson

4

## Maintain Employee Pay

This lesson covers the following topics:

- Maintaining Employee Additional Pay



# Maintaining Employee Additional Pay

- Fixed, Recurring Payments in addition to Regular Pay
  - Cell Phone Reimbursement
  - Adjunct Pay
  - Temporary Pay
- For Retroactive Effective Dates:
  - Payroll Admin calculates retroactive amount
  - Payroll Admin processes payment in SPOT
- For partial amounts due to Mid-Pay Period changes:
  - Effective Date is the actual date the additional pay became effective
  - Payroll Admin calculates prorated amount
  - Payroll Admin processes payment in SPOT
- Only HR enters Additional Pay transactions

For further information on SPOT payments, refer to the Job Aid titled **PY381 Using the Single-Use Payroll Online TOOL (SPOT)**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Additional Pay, see the Job Aid titled **HR351 Processing Additional Pays**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Maintaining Employee Additional Pay (continued)

Payroll Administrators verify the correct **Pay Periods** and the **OK to Pay** checkboxes are selected.

**Create Additional Pay**

Employee \_\_\_\_\_ Empl ID \_\_\_\_\_ Empl Record 0

**Additional Pay** Find | View All First 1 of 1 Last

\*Earnings Code SP1 Misc Agency Supplemental Pay 1

**Effective Date** Find | View All First 1 of 1 Last

Effective Date 01/28/2021

**Payment Details** Find | View All First 1 of 1 Last

\*Addl Seq Nbr 1 End Date 12/28/2022

Rate Code \_\_\_\_\_ Reason Not Specified

Earnings \$100.00

Hours \_\_\_\_\_ Hourly Rate \_\_\_\_\_

Goal Amount \_\_\_\_\_ Goal Balance \_\_\_\_\_

Sep Check Nbr \_\_\_\_\_

OK to Pay  Disable Direct Deposit  Prorate Additional Pay

**Applies To Pay Periods**

First  Second  Third  Fourth  Fifth

▶ Job Information

▶ Tax Information

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History



# Additional Pay Earnings Codes

**Typical Additional Pay Earnings Codes**

<b>Earn Code</b>	<b>Description</b>	<b>Add to Gross Income</b>	<b>Taxable</b>	<b>Notes</b>
CAR	Reimb Use of Personal Car	Y	Y	
CCR	Company Car	N	Y	
MIL	Military Supplement	Y	Y	
MNT	Mobile Device Nontaxable	Y	N	
MTB	Mobile Device Taxable	Y	Y	
SEV	Severance Pay	Y	Y	
TMN	Temp Pay Non Paid Agys	N	N	
TMP	Temporary Pay	Y	Y	
TPD	Taxable Per Diem	Y	Y	
TTR	Taxable Tuition	Y	Y	
VRS	VRS Contribution Base	N	N	Loaded by Batch Program
PRW	Premium Reward	Y	Y	Loaded by Interface

**Navigation:** Navigator > Payroll for North America > Employee Pay Data  
 USA > Create Additional Pay



# Additional Pay Earnings Codes (continued)

## Agency Specific Additional Pay Earnings (e.g. supplement for working conditions)

Earn Code	Description	Add to Gross Income	Taxable	Notes
TXB	Misc Agency Specific Pay	Y	Y	
SP1	Misc Agency Supplemental Pay 1	Y	Y	
SP2	Misc Agency Supplemental Pay 2	Y	Y	
SPA	Misc Agency Specific Pay Amt	Y	Y	
AGY	Misc Agency Specific Pay	Y	Y	

## Typical Additional Pay Earnings for Higher Education

Earn Code	Description	Add to Gross Income	Taxable	Notes
WSS	Work Study Student	Y	Y	
SSN	Student Stipend NonTaxable	Y	Y	
SST	Student Stipend Taxable	Y	Y	
FOT	Faculty Other Pay (Adjunct for Sala	Y	Y	
AJT	Adjunct Faculty	Y	Y	

**Navigation:** [Navigator](#) > [Payroll for North America](#) > [Employee Pay Data USA](#) > [Create Additional Pay](#)



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. True or False. An employee receives base salary on the additional pay line.



2. Additional pay is added to an employee's paycheck to reflect:

- a) Temporary pay, military pay, adjunct pay, stipends
- b) Leave of absence, stipends
- c) Short term disability



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Lesson Summary

4

Maintain Employee Pay

In this lesson, you learned:

- How to Maintain Employee Additional Pay



**Next Few Topics are for  
VPA Agencies only**



# Lesson

5

## Maintain Additional HR Data (HR Level 1)

This lesson covers the following topics:

- Entering and Maintaining Disciplinary Actions
- Entering and Maintaining Performance Ratings
- Entering and Maintaining Rewards and Recognition



# Entering and Maintaining Disciplinary Actions

## Entering and Maintaining Disciplinary Actions Overview

The Cardinal Disciplinary Action pages are used to record and track written notices and disciplinary actions. In addition, when the disciplinary action results in a change to the employee's job classification or compensation, an update to the employee's Job Record is required to impact the HR and Payroll functional areas (e. g., demotions, reductions in pay, terminations). DHRM will allow agencies to delete written notices and the associated disciplinary actions from the disciplinary action pages vs. requiring DHRM intervention.

Written notices can only be entered for VPA employees. Cardinal will not allow the user to enter a written notice for a non-VPA employee.

The Agency HR Administrator enters the written notice, along with the related details, which include the date of the offense, the nature of the offense, and any relevant agency notes. The expiration date of the written notice will default based on the group level. No manual updates will be made to this field. Agency HR can view the written notices via the online page or by using custom reports and queries. If there is a reverse or update to the disciplinary action, Agency HR will have the ability to update as required.

However, DHRM involvement is still required to modify the employee's job data record and reverse the disciplinary action. This will require a PPS ticket to be created.

Agency HR Administrators will have display only access to Disciplinary Actions entered by other agencies for their active employees.



# Entering and Maintaining Disciplinary Actions

After a written notice has been entered, the agency will record the disciplinary actions associated with the written notice. The types of Disciplinary Actions include:

Disciplinary Lateral Transfer

Disciplinary Demotion

Disciplinary Pay Reduction (must accompany a Disciplinary Lateral Transfer and Demotion)

Suspension

Termination – Involuntary (Violation of Standards of Conduct)

For further information on completing a Disciplinary Actions, see the Job Aid titled **HR351 Entering and Maintaining Disciplinary Actions**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on employee salary reduction, see the Job Aid titled **HR351 Employee Compensation**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.



# Entering and Maintaining Disciplinary Actions

Written Notice | Disciplinary Action | Disciplinary Resolution

Business Unit 76500  
Person ID [Redacted]  
Total Incident 0  
Empl Record 1

Written Notice 1 of 1 | View All

\*Type

\*Reported Date 12/10/2020

\*Description

Supervisor ID

Expiration Date

Offense Information 1 of 1 | View All

\*Offense Code

Offense Date

**Navigation:** Navigator > Workforce Administration > Labor Administration > Record Disciplinary Actions



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Entering and Maintaining Performance Rating

## Performance Rating Overview

The Department of Human Resource Management (DHRM) maintains annual performance cycles and cycle effective dates. DHRM also communicates the applicable open/closed dates through normal business processes. Standard annual statewide employee performance management cycle is 12-month period from October 25 – October 24

Performance Ratings are annually collected and entered for all VPA employees.

- Four possible ratings:
  - X – Extraordinary Contributor
  - C – Contributor
  - B – Below Contributor
  - L – Employee on Leave or Otherwise Not Rated

During the annual performance rating cycle, Agency HR will now upload all ratings for their employees (X-Extraordinary, C-Contributor, B-Below Contributor, L- Employee on Leave or Not Rated).

- If rating is B – Below Contributor, enter planned re-evaluation date (no later than 90 days after evaluation)
- After re-evaluation, enter actual re-evaluation date and updated rating
- Initiate Separation as required

The Agency HR will also have the option to manually enter a rating for each employee directly into Cardinal via the Performance Rating page.



## Entering and Maintaining Performance Rating (continued)

- If statewide compensation increase calls for certification of performance ratings, DHRM communicates Performance Certification (i.e., effective date the performance cycle )
- Performance ratings may factor in of pay adjustment decisions; maintain compliance with DHRM Performance Management Policy 1.65

For further information on Mass Uploads, see the Job Aid titled **HR351 Performance Ratings**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Mass Uploads, see the Job Aid titled **HR351 Mass Uploads**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on Compensation Changes, see the Job Aid titled **HR351 How to Change/Update Employee Compensation**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.





**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Entering and Maintaining Rewards and Recognition

Agency HR runs by-agency Rewards and Recognition Report

- YTD totals by Employee and by Type (confirm/deny compliance)
- Includes both Leave and Monetary Awards

Consolidated reporting pulls leave awards from the Cardinal Leave Award page and Cardinal Absence Management to show statewide totals of leave awards. For further information on Reports, see the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources**.

## Leave Reward

- Agencies **NOT** using Cardinal Absence Management
  - Enter Leave Award information through Cardinal **Rewards and Recognition** page
  - Also enter Leave Award hours in external leave system of record
  - Cardinal does not interface to external systems of record
- Agencies using Cardinal Absence Management
  - Enter Leave Awards as balance adjustments or entitlements in Cardinal Absence Management
  - Consolidated reporting pulls Leave Awards from **Rewards and Recognition** page and Cardinal Absence Management to show statewide totals

For further information on how to enter the balance adjusts into Cardinal, see the Job Aid titled **TA374 Managing Absence Balances**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Entering and Maintaining Rewards and Recognition

## Monetary Bonus

- Agency HR tracks employee's:
  - Written Agreement
  - Expiration date of the Written Agreement per incentive bonus
  - Payment Installments (singular or multiple – as needed)
- Agency HR updates and submits Excel spreadsheet to Agency Payroll to load into the Single Use Payroll Online Tool (SPOT) for payment
- For large volumes, optionally submit a file of rewards and recognition using the mass upload process

For further information on Rewards and Recognition see the Job Aid titled **HR351 Rewards and Recognition**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



# Entering and Maintaining Rewards and Recognition

- Agency HR runs by-agency Rewards and Recognition Report
  - YTD totals by Employee and by Type (confirm/deny compliance)
  - Includes both Leave and Monetary Awards
- Cardinal Rewards and Recognition tracks the following:
  - 529: Sign On/Retention 529 PMT
  - ALI: Annual Leave Incentive
  - ERB: Employee Recognition Bonus
  - ERL: Employee Recognition Leave
  - ERN: Employee Recognition Non Mon
  - ESL: Employee Suggestion Leave
  - ESP: Employee Suggestion PMT
  - IBB: Inband Bonus
  - PBB: Project Based Bonus
  - RLP: Referral PMT
  - RNB: Retention Bonus
  - SAL: Service Award Leave
  - SOB: Sign On Bonus
  - SOL: Sign On Leave
  - SRS: Sign On/Retention Student Loan



# Entering and Maintaining Rewards and Recognition

New Window | Help | Personalize Page

**Rewards and Recognition**

Employee Name: [Redacted] Employee ID: [Redacted]  
Business Unit: 70100 Dept of Corr - Central Admin Empl Record: 0  
Position: DOCHR022 Security Officer III Critical/Hard to Hire: N

**Reward** 1 of 1 | View All

Reward ID: 1 + -

**Authorization/Written Agreement** 1 of 1 | View All

\*Effective Date: 11/15/2020 \*Creation Date: 11/18/2020 + -  
Expiration Date: 11/15/2021 \*Written Agreement?: Yes  
\*Reward Type: SOB Sign On Bonus  
Authorized Hours: 0.00 Authorized Amount: \$5,000.00  
YTD Hours: 0.00 YTD Amount: \$0.00  
Comments: [Text Area] 254 characters remaining

**Award Payouts** 1 of 2 | View All

\*Award Date: 11/21/2020 Award Hours: 0.00 Award Amount: \$2,500.00 + -  
\*Award Date: 12/21/2020 Award Hours: 0.00 Award Amount: \$2,500.00 + -



# Lesson Checkpoint

Now is your opportunity to check your understanding of the course material.



1. Disciplinary actions are recorded for:
  - a) Classified employees only.
  - b) All employees



2. True or False. Performance ratings are entered every month for all employees.



3. True or False. Reward and recognition pages in Cardinal are used to track an annual bonus for all employees.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Lesson Summary

5

## Maintain Additional HR Data

In this lesson, you learned:

- How to enter and maintain Disciplinary Actions
- How to enter and maintain Performance Ratings
- How to enter and maintain Rewards and Recognition



# Lesson

6

## Running Reports and Queries

This lesson covers the following topics:

- HCM Reports Catalog
- Accessing and Running a Report
- Accessing and Running a Query



# HCM Reports Catalog

The Human Capital Management (HCM) Reports Catalog covers the four functional areas of Benefits (BN), Human Resources (HR), Payroll (PY), and Time & Attendance (TA). Each functional area contains queries and reports specific to that area. The HCM Reports Catalog can be found on the Cardinal website under **Resources**.

- **Cardinal SW NAV225 Cardinal Reporting (HCM)** Web Based Training (WBT) course provides training and interactive demonstrations that cover the fundamentals of how to run or access reports and queries. This course is available in Cardinal Learning and on the Cardinal Website.
- Reports/queries may be used by more than one functional area, thus, you may need to use the search/find feature to locate a specific report/query that may be located in a different functional area.

## In Cardinal:

- To run a report, the full navigation path for a specified report can be found in the HCM Reports Catalog.
- To run a query, Navigate to: Navigator > Reporting Tools > Query > Query Viewer and search for the query name

For further information on reports and queries in Cardinal, see the Reports Catalog titled **Cardinal HCM Reports Catalog**. The Cardinal HCM Reports Catalog is located on the Cardinal under **Resources**.



**DEMO**



# Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





# Lesson Summary

6

## Running Reports and Queries

In this lesson, you learned:

- How to access the HCM Reports Catalog
- How to run Reports
- How to run a Query



# Course Summary

HR351

HCM Cardinal Employee Data Setup and Maintenance

In this course, you learned:


- There is a relationship between position, job data, personal data, and job record
- How to add, clone, and maintain a position
- How to hire an employee online
- How to enter job data updates
- How to enter additional pay information
- How to enter and maintain Disciplinary Actions
- How to enter and maintain Performance Ratings
- How to enter and maintain Rewards and Recognition
- How to access the HCM Reports Catalog
- How to run Reports
- How to run a Query



# How to Complete Course Evaluations

The following steps can be used to complete course evaluations at the end of an ILT or VILT training session. **Please note that it may take a couple of hours after the completion of your course for evaluations to be available.**

1. Navigate to the Cardinal Learning Homepage.
2. Enter your username in the **Username** field.
3. Enter your password in the **Password** field.
4. Click the red **Log In** button.



Please enter your Username and Password

[Forgot password?](#)

Need help logging in? [Contact us!](#)

**Welcome to Cardinal Learning!**

**The Cardinal Learning curriculum combines:**

- Web-Based Training (WBT)
- Instructor-Led Training (ILT)
- Virtual Instructor-Led Training (VILT)

**Use Cardinal Learning to:**


- View assigned curriculum
- Complete WBT courses
- Register for ILT and VILT courses



# How to Complete Course Evaluations (Continued)

5. The Cardinal Learning Homepage displays.

You are currently logged in as Carrie Cardinal



Home Learning


Welcome, Carrie, to Cardinal Learning!

Get Ready for Instructor-Led Training!

1. Click Open Curriculum to review and register for assigned training.
2. Sign up for a Technology Readiness Session prior to your first Instructor-Led Training (ILT).
3. Complete all assigned Web-based Training (WBT).
4. Attend ILTs!

Training Notes

If you are assigned...	Then...
HR351	You must complete the course prior to all other ILTs
BN361	You can complete it at any time after all WBTs, TECH and HR351 or HR353 are completed
TA Courses	You must complete in sequential order as assigned. TA371 > TA372 > TA374
PY381	All assigned TA courses must be completed prior to taking PY381



**Web-Based Training**

No Training in Progress

**Upcoming Sessions**

	Status
HR351 - Employee Data Setup and Maintenance (Starts 7/27/2021)	Registered
TA372 - Time & Attendance Administration (Starts 8/11/2021)	Registered

**My Training**

	Due Date	Status	Action
TECH - Technology Readiness Session	None	Denied	Select Session
HR, TA	None	In Progress	Open Curriculum

**My Waitlist Tracking**


You have no waitlisted sessions.  
You have indicated interest in 1 event(s).



# How to Complete Course Evaluations (Continued)

- 6. Hover over the **Learning** tab in the **Global Navigation** bar.
- 7. In the displayed dropdown menu, click **View Your Transcript**.

You are currently logged in as Carrie Cardinal



Home **Learning**


Welcome to Global Learning!

Get Ready **View Your Transcript** Interests and Waitlists

1. Click on [Interests and Waitlists](#) to register for assigned training.
2. Sign up for a Technology Readiness Session prior to your first Instructor-Led Training (ILT).
3. Complete all assigned Web-based Training (WBT).
4. Attend ILTs!

**Training Notes**

If you are assigned.	Then.
HR351	You must complete the course prior to all other ILTs
BN361	You can complete it at any time after all WBTs, TECH and HR351 or HR353 are completed
TA Courses	You must complete in sequential order as assigned: TA371 > TA372 > TA374
PY381	All assigned TA courses must be completed prior to taking PY381



**Web-Based Training**

No Training in Progress

**My Training**

	Due Date	Status	Action
TECH - Technology Readiness Session	None	Denied	Select Session
HR, TA	None	In Progress	Open Curriculum

**My Waitlist Tracking**

You have no waitlisted sessions.  
You have indicated interest in 1 event(s).

**Upcoming Sessions**

	Status
HR351 - Employee Data Setup and Maintenance (Starts 7/27/2021)	Registered
TA372 - Time & Attendance Administration (Starts 8/11/2021)	Registered



# How to Complete Course Evaluations (Continued)

8. Your **Transcript** page displays.
9. Hover over the **Active** tab.
10. In the displayed dropdown, click **Completed**.

You are currently logged in as Carrie Cardinal

Cardinal

Home Learning

Carrie Cardinal Bio Transcript Actions

Home > Carrie Cardinal > Transcript: Carrie Cardinal

### Transcript: Carrie Cardinal

Use the transcript to manage all active training.

Active By Date Added All Types Search for training

Active  
Completed  
Archived

Technology Readiness Session (Starts 7/29/2021 9:00 AM) Select Session

HR, TA Due: No Due Date Status: In Progress Open Curriculum



# How to Complete Course Evaluations (Continued)

11. Your **Transcript** page refreshes.
12. Hover over the **View Certificate** button for the completed course.
13. In the displayed dropdown, click **Evaluate**.

You are currently logged in as Carrie Cardinal

**Cardinal**

Home Learning

Carrie Cardinal Bio Transcript Actions

Transcript: Carrie Cardinal

Use the transcript to manage all active training.

Completed By Completion Date All Types Search for training

Search Results (2)

- HR352/BN361 - Employee Data & Benefit Enrollment Setup and Maintenance (Starts 7/20/2021 3:50 PM)**  
Completed: 7/20/2021 Status: Completed
- A Test Event (Starts 6/17/2021 4:35 PM)**  
Completed: 6/17/2021 Status: Completed

View Certificate  
View Certificate  
Evaluate  
View Training Details



# How to Complete Course Evaluations (Continued)

14. A course evaluation notification displays.
15. Click **Continue**.

The screenshot shows a dialog box with the Cardinal logo in the top left. The title is "Evaluation - HR352/BN361 - Employee Data & Benefit Enrollment Setup and Maintenance". Below the title, it says "Instructor-Led Training Evaluation". At the bottom, there are two buttons: "Cancel" and "Continue". The "Continue" button is highlighted with a red rectangular box.

16. The course evaluation displays.
17. Complete and submit the course evaluation.

The screenshot shows the course evaluation form. It features the Cardinal logo at the top left and the title "Evaluation - HR352/BN361 - Employee Data & Benefit Enrollment Setup and Maintenance" on the right. Below the title, it says "Instructor-Led Training Evaluation(Virtual and In-Person)". A horizontal line separates the title from the content. Below the line, it says "Question 1 ." followed by the instruction "Please select the name of your Agency." and a list of radio button options:

- Auditor of Public Accounts
- Danville Schools
- Department of Accounts
- Department of Agriculture and Consumer Services
- Department of Emergency Management
- Department of Human Resource Management
- Department of Small Business and Supplier Diversity
- Fort Monroe Authority
- James Madison University



# **Employee Transfers – Interim Scenarios**



# Transfer Employees to/from R3 Agency

## Scenario 1:

Employee is currently in R1/R2 Agency (via Conversion), transferring to R3 Agency (with PMIS record)

- R1/R2 Agency will terminate the employee in Cardinal – TER/XFO
- R3 Agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002.
- R3 Agency will review personnel file and if PMIS transactions are missing that impact record (pay rate change, Leave of Absence, etc.), submit a DHRM iHelp request to add.
- R3 Agency will work with OHB to amend the Benefits record in BES

## Scenario 2:

Employee currently in R1/R2 Agency, whose original hire was after R1/R2 go-live, is transferring to an R3 Agency (only EmplID created in PMIS)

- R1/R2 Agency will terminate the employee in Cardinal
- R3 Agency will pull the employee in using PES001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002.
- R3 Agency will need to create the BES record, if applicable.



# Transfer Employees to/from R3 Agency

## Scenario 3:

Employee currently in R3 Agency with a PMIS record, but No Cardinal Record, is transferring to an R1/R2 agency (Between R1/R2 – R3, PMIS nightly interface is loading Empl ID and SSN to Cardinal)

- R3 agency will terminate the employee in PMIS
- R1/R2 Agency will retrieve the existing EmplID in Cardinal using Employee Search Match
- R1/R2 Agency will hire the employee in Cardinal including personal data as well as position/job data

## Scenario 4:

Employee transfers from R3 to R1/R2 agency then transfers back to the R3 prior to R3 Go-Live

- R3 agency will terminate employee in PMIS
- R1/R2 Agency will retrieve the existing EmplID in Cardinal using Employee Search Match
- R1/R2 Agency will hire the employee in Cardinal via the Add Employment Instance to create the job record. Once the job is complete, review/update personal data using Modify a Person.

When processing transfer back to R3 agency:

- R1/R2 agency will use the TER/XFO Action/Action reason to terminate employee in Cardinal
  - R3 Agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002.
- 
- Employee transfers from R1/R2 to R3 agency then transfers back to R1/R2



# Transfer Employees to/from R3 Agency

## Scenario 5:

Employee transfers from R1/R2 to R3 agency then transfers to a different R1/R2 agency prior to R3 Go-Live

- R1/R2 agency will terminate employee in Cardinal using the TER/XFO Action/Action Reason
- R3 agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002.

When processing transfer into the different R1/R2 agency:

- R3 agency will terminate the employee in PMIS
- R1/R2 agency will use the HIR Action and applicable XF\_ to Transfer the employee into the new empl record using Add Employment Instance.

## Scenario 6:

Employee transfers from R1/R2 to R3 agency then transfers back to **same** R1/R2 agency prior to R3 Go-Live

- R1/R2 agency will terminate employee in Cardinal using the TER/XFO Action/Action Reason
- R3 Agency will pull the employee in using PSE001 as a transfer with no break in service, selecting Transfer from non-PMIS agency. This will result in a Rehire PSE002.

When processing transfer back to R1/R2 agency:

- R3 agency will terminate the employee in PMIS
- R1/R2 agency will use the REH Action to Transfer the employee back into the same (existing) empl record by adding a row to job data...only if the employee type is the same (Sal-to-Sal)