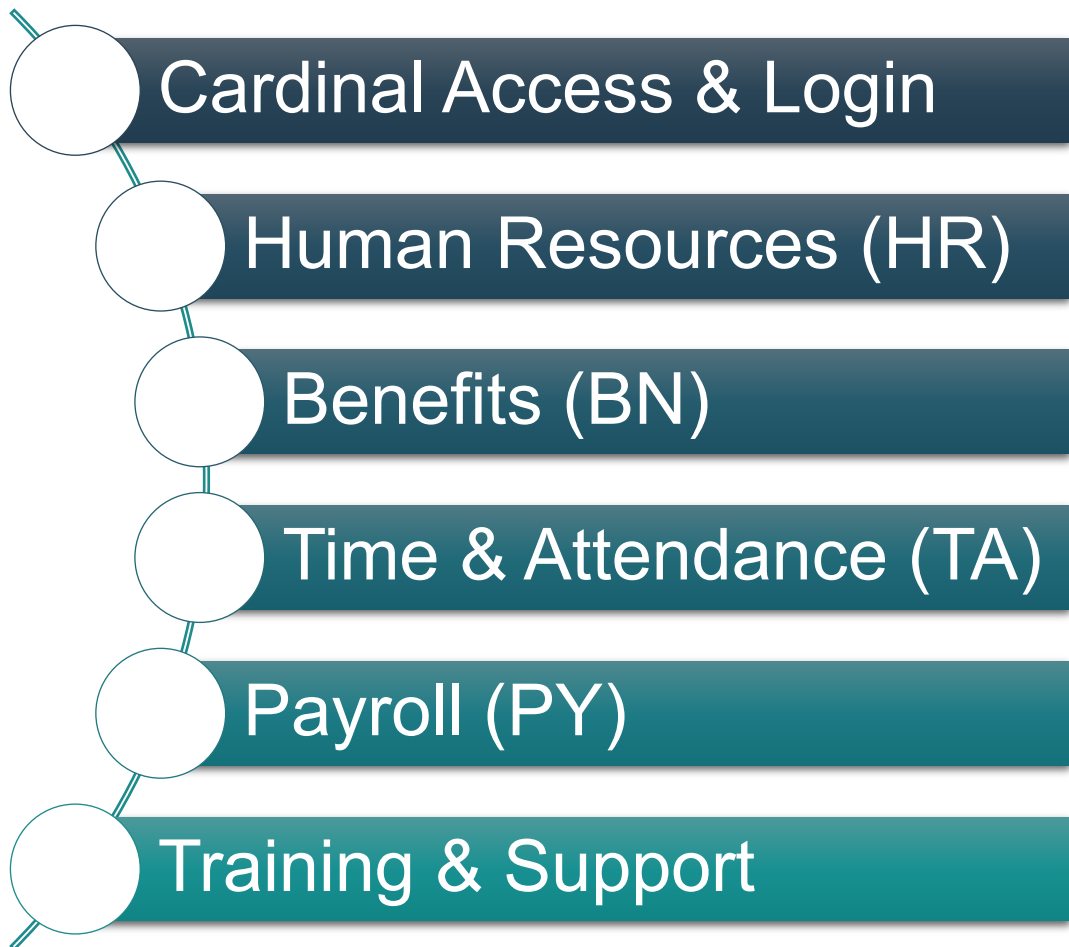




# Cardinal HCM Core User Support Guide

This guide provides **new HCM Core Users** essential starting information, including **Cardinal login details, common topics and associated job aids organized by HCM module**, and essential support contacts.



## Need more info?

While this document offers a valuable starting point, the **Cardinal website** is the most comprehensive resource for all Cardinal materials and support.



[cardinalproject.virginia.gov](http://cardinalproject.virginia.gov)



# Cardinal Access and Security – Core Users

**Core User** access refers to the specific security role(s) given to Cardinal users who **perform day-to-day administrative functions** in the HCM and/or FIN applications.

## How is core user access granted?

- Core User access is granted only after your agency submits a **Cardinal Security Form** on your behalf.

## Who should I contact about my roles/access?

- Your [Cardinal Security Officer](#) (CSO) is your first point of contact for any questions about the roles and access you hold.

## How do I maintain my core user access?

- Core Users **must** log in to Cardinal at least once every **90 days** to maintain access. After 90 days, core user roles are removed, Employee Self-Service (ESS) access remains available.

## What data is essential for access?

- A **valid email address** in Cardinal is essential. Ensure your HR Administrator updates and maintains your personal data record accordingly.

Find security resources, including the Security Handbook, forms, and a list of CSOs, on the Cardinal Security webpage.



[cardinalproject.virginia.gov/security](https://cardinalproject.virginia.gov/security)



# First Time Login & Registration

Login URL: [my.cardinal.virginia.gov](https://my.cardinal.virginia.gov)

Your login process depends on your network status:

## VITA COV-Network Users:

Log in to Cardinal using your existing COV email and network password. No registration is needed.

## Non-COV\* Users:

You must complete a **one-time registration** and set up Okta Multifactor Authentication (MFA) to secure your account.

Non-COV\* refers to agencies and agencies/users operating outside of the VITA COV-Network. To confirm your agency's status, check the [Agency Network Status](#) list.



Bookmark this page!

## Need to Register?

- The [Active Employees Registration Guide](#) provides step-by-step instructions.

## Registration Requirements

- Email address (as recorded in Cardinal)
- 11-Digit Cardinal Employee ID Number\*
- Last 4 digits of SSN\*

Need help with Cardinal Login or Registration?

Visit the Login Help webpage.



[cardinalproject.virginia.gov/login-help](https://cardinalproject.virginia.gov/login-help)

*\*Contractors will not be prompted for Employee ID or the last 4 digits of their SSN.*



# Human Resources (HR)

The **HR** module is central to all HCM operations, and its processes have significant **downstream impacts** on every other module. This page addresses Cardinal’s most common HR-related questions and issues and provides essential tips for Core HR users.

Topic	Job Aids & Helpful Resources	Additional Tips from the Cardinal Team
New Hire, Rehire Termination, and/or Transfers	<ul style="list-style-type: none"> <li>• <a href="#">HR351 Completing a New Hire</a></li> <li>• <a href="#">HR351 Completing a Rehire</a></li> <li>• <a href="#">HR351 Separation Statuses</a></li> <li>• <a href="#">HR351 Managing an Inter-Agency Transfer</a></li> <li>• <a href="#">HR352 Completing a New Hire (Benefits only)</a> (For Health Benefit Only (HBO) agencies and Localities)</li> </ul>	<p><b>Check for Existing Employee Record.</b> Before processing a new hire, always search Cardinal HCM to confirm the individual does not already have a personal data record.</p> <p><b>Process all personnel changes (hires, transfers, terminations) timely.</b> Delays disrupt employee pay, benefits, and system access.</p>
Action/Action Reason Codes	<a href="#">HR351 Action Reason Codes</a> (excel document)	<b>Verify the Action/Action Reason Codes.</b> This combination controls job updates and has direct impacts on an employee's Pay, Benefits, and Time & Attendance.
Employee Class	<a href="#">HR351 Employee Class Overview</a> (excel document)	<b>Set the Employee Class accurately.</b> This classification is essential for HR reporting and governs an employee’s eligibility for Benefits and how they report Time & Attendance.
Additional Pay	<a href="#">HR351 Processing Additional Pays</a>	<b>For corrections</b> to submitted Additional Pay data, you must <b>Submit a Ticket</b> to the Cardinal PPS team, providing details of the required correction.
Effective Dating	<a href="#">HR351 Overview of Effective Dating</a>	<b>Verify the Effective Date.</b> Always confirm the date is accurate before saving. An incorrect date compromises data history and impacts Payroll, Benefits, Time Reporting, and Leave Balances.
HR Policy Questions	<b>Contact DHRM</b> at <a href="mailto:ihelp@dhrm.virginia.gov">ihelp@dhrm.virginia.gov</a> for all questions about HR Policy.	



# Benefits (BN)

The **BN module** is a core component of HCM operations, requiring close coordination with other module administrators for streamlined workflow. This page addresses Cardinal’s most common benefits questions and issues and provides essential tips for Benefit Administrators.

Topic	Job Aids & Helpful Resources	Additional Tips from the Cardinal Team
Managing and Approving Dependents	<ul style="list-style-type: none"> <li>• <a href="#">BN361_Managing and Approving Dependents</a></li> </ul>	<p><b>Regularly run the Benefit Eligibility Audit to monitor</b> dependents awaiting approval. Unapproved dependents are not covered under the employee’s plan coverage.</p>
Transfers – Health Benefits and Data Review	<ul style="list-style-type: none"> <li>• <a href="#">BN361_Managing Terminations and Transfers</a></li> <li>• <a href="#">Inter-Agency Transfer Process forum</a></li> </ul>	<p>Processing a transfer <b>requires</b> the sending agency to terminate the employee before the receiving agency performs the new hire action.</p> <p><b>Process transfers promptly:</b> Delays disrupt employee Pay, Benefits, and system access.</p> <p>The <b>receiving agency BN Admin</b> must <b>review and confirm</b> all transferred employee benefits post-transaction to ensure accuracy.</p>
Retirees	<ul style="list-style-type: none"> <li>• <a href="#">BN361_ORP Retiree Guide</a></li> <li>• <a href="#">VRS Retirement and LTD Processes for HR and BN Admins</a></li> </ul>	<p><b>Follow the ORP Guide</b> for the complete, step-by-step process covering the two most common ORP Retiree scenarios.</p> <p><b>Coordinate with HR Admins</b> to guarantee accurate setup for retirees.</p>
Health Benefits Summary	<ul style="list-style-type: none"> <li>• <a href="#">BN361_Reviewing Employee Benefits Information</a></li> </ul>	<p><b>View the Health Benefits page</b> for current, historical, and future dated health benefit enrollments for an employee.</p>
Health Benefits Policy Questions	<p><b>Contact OHB</b> at <a href="mailto:ohb@dhrm.virginia.gov">ohb@dhrm.virginia.gov</a> for all benefit policy questions.</p>	



# Time & Attendance (TA)

The **TA module** integrates with Payroll to ensure **accurate pay** based on recorded employee time and leave. This page addresses Cardinal’s most common TA related questions and issues and provides essential tips for Core TA users.

Topic	Job Aids & Helpful Resources	Additional Tips from the Cardinal Team
Timesheet Edit Access	<ul style="list-style-type: none"> <li>• <a href="#">Cardinal HCM – Impeccable tips for HR, BN, and TL Admins</a> communication</li> </ul>	<p><b>Check Elig Config 3 field on the Job Data page.</b> Set the field to 'Y' for timesheet edit access; 'N' or blank defaults to view-only. Non-Payroll agencies: leave field blank.</p> <p><b>Coordinate with HR Admins</b> if updates are required.</p>
Leave/Absence Balances	<ul style="list-style-type: none"> <li>• <a href="#">TA374 Managing Absence Balances</a></li> <li>• <a href="#">TA374 Absence Management Leave Types &amp; Eligibility</a> (excel document)</li> </ul>	<p><b>AM Administrators</b> can <b>modify leave balances</b> for periods up to one year from the current open period. Coordinate with AM Admins for absence/leave questions.</p> <p><b>PSB contracted agencies: Contact your HR Administrator</b> to coordinate with PSB AM Administrators.</p>
“Reports to” Issues	<ul style="list-style-type: none"> <li>• <a href="#">TA373 Approving Time and Absences</a></li> <li>• <a href="#">Time &amp; Labor Administrator Forum</a> (09:22)</li> </ul>	<p><b>Approving time:</b> Ensure your "Reports To" field in Job Data is accurate for time approvals.</p> <p>Coordinate with HR Admins if any changes are required.</p>
Time Administration	<ul style="list-style-type: none"> <li>• <a href="#">TA373 Approving Time and Absences</a></li> <li>• <a href="#">TA Time Status Administration</a></li> </ul>	<p><b>Time Management Limits</b></p> <ul style="list-style-type: none"> <li>• <b>Supervisors:</b> Edit and approve productive time within 90 days.</li> <li>• <b>T&amp;L Administrators:</b> Edit time up to 365 days.</li> <li>• <b>TA Expired Grace Approvers:</b> Edit and approve time &gt; 90 days.</li> </ul> <p>Role-based scenarios and action items are included in the provided job aid.</p>



# Payroll (PY)

The **PY module** is critical as it validates core HR data, calculates all employee compensation and deductions, and posts the essential data to Cardinal Financials. This page addresses Cardinal’s most common payroll related questions and issues and provides essential tips for Payroll Administrators.

Topic	Job Aids & Helpful Resources	Additional Tips from the Cardinal Team
Payroll Calendar	<ul style="list-style-type: none"> <li>• <a href="#">Payroll Administrator Forum</a></li> </ul>	<p>Review the PY Admin forum to understand the Operations Calendar including time sheet deadlines, creating paysheets, confirming pay, and payday.</p> <p><b>Review</b> the <a href="#">SPO website</a> for information on the Payroll Calendars, important documents, and organization information.</p>
SPOT Transactions	<ul style="list-style-type: none"> <li>• <a href="#">PY381 Using the Single Use Payroll Online Tool (SPOT)</a></li> <li>• <a href="#">PY381 Extended Leave Processing</a></li> </ul>	<p><b>Payroll Administrators</b> use the <b>Single-Use Payroll Online Tool (SPOT)</b> to enter one-time pay or deduction transactions in Cardinal.</p> <p><b>Payroll Administrators:</b> Use this job aid for the required <b>SPOT</b> entry steps for <b>Extended Leave (STD &amp; WC)</b> in Cardinal.</p> <p><b>Note:</b> HR and TL/AM Administrators perform separate, related actions. This document focuses only on <b>Payroll</b> entries.</p> <p>Always use the <b>first day of STD coverage</b> as the effective date—<b>not</b> the start of the waiting period.</p>
Payroll Reporting	<ul style="list-style-type: none"> <li>• <a href="#">Cardinal HCM Payroll Reports Catalog</a></li> </ul>	<p><b>Frequently used reports:</b></p> <ul style="list-style-type: none"> <li>• COVA Payroll Register (RPY137)</li> <li>• COVA Payroll Summary Report (RPY138)</li> <li>• COVA Deduction Register Report (RPY146)</li> </ul>
Payroll Policy Questions	<p><b>Contact SPO</b> at <a href="mailto:payroll@doa.virginia.gov">payroll@doa.virginia.gov</a> for all questions about state payroll policy.</p>	



# Cardinal HCM Training

Cardinal offers many options for Cardinal HCM Training. Web-Based Trainings are available for all users, while Instructor-Led Trainings are assigned based on the roles you hold in Cardinal. Refer to the [HCM Roles to Training Course Mapping](#) document for a comprehensive list of available training by role.

**Need to register for an ILT? Submit a [Cardinal Training Request form](#).**

Once this form is submitted, the Cardinal Training team will contact you directly with instructions on how to register for the training sessions

## Web-Based Trainings (WBTs)

- Self-paced courses that provide users with essential building blocks to navigate, report, and understand functional areas in HCM.
- Pre-requisite course work to ILTs.

## Instructor-Led Trainings (ILTs)

- Hands-on courses for select Core Users facilitated by Cardinal's expert instructors:
  - HR351 Cardinal Employee Data Setup and Maintenance
  - BN361 Benefit Enrollment & Maintenance
  - TA372 Time & Attendance Administration
  - TA374 Absence Management Maintenance
  - PY381 Agency Payroll Management

**Need help with Cardinal training?**

Email [CardinalTraining@doa.virginia.gov](mailto:CardinalTraining@doa.virginia.gov) for assistance.



# Support Contacts for HCM Core Users

The Cardinal team works with iHelp, OHB, and SPO to provide comprehensive support. Follow the guidance below to direct your questions to the right team for a faster solution.

Support Team	Questions/Issues	Example Questions	How to Contact	Support Websites
<b>iHelp</b>	<b>Human Resource policy</b> related questions/issues and how-to questions.	<ul style="list-style-type: none"> <li>• What dates should I use for this STD claim?</li> <li>• How can I make an adjustment to the dates for a VSDP claim?</li> </ul>	<a href="mailto:iHelp@dhrm.virginia.gov">iHelp@dhrm.virginia.gov</a>	<a href="#">DHRM website</a> <a href="#">HR Policies</a> <a href="#">DHRM Publications</a>
<b>OHB</b>	<b>Health Benefit policy</b> related questions/issues and how-to questions.	<ul style="list-style-type: none"> <li>• What health benefit coverage code do I select for an employee and their child, but no spouse?</li> <li>• How do I submit a marriage life event to adjust my health benefits?</li> </ul>	<a href="mailto:ohb@dhrm.virginia.gov">ohb@dhrm.virginia.gov</a>	<a href="#">Health Benefits Contact Information</a>
<b>SPO</b>	<b>Payroll policy and procedures</b> related questions/issues	<ul style="list-style-type: none"> <li>• When is payroll confirmation for this pay period?</li> <li>• What is the cutoff date for timesheet submissions?</li> <li>• How do I set up tax data for an employee not working in Virginia? Or for an employee who resides in another state and the state is not set up in Cardinal?</li> </ul>	<a href="mailto:payroll@doa.virginia.gov">payroll@doa.virginia.gov</a>	<a href="#">Payroll Bulletins</a>
<b>Cardinal PPS</b>	<b>System issues or corrections</b> needed	<ul style="list-style-type: none"> <li>• How do I fix the attached timesheet error so I can save the prior period adjustment?</li> <li>• How do I correct the effective date for an employee?</li> </ul>	<a href="mailto:vccc@vita.virginia.gov">vccc@vita.virginia.gov</a> Include "Cardinal" in the subject line	<a href="#">Cardinal website</a> <a href="#">Cardinal Communications</a> <a href="#">Cardinal Job Aids</a> <a href="#">Cardinal Reports Catalogs</a>



# Cardinal Help Desk Support

For technical issues that you cannot resolve, the Cardinal Team provides technical support during business hours: **8:00 a.m. – 5:00 p.m., Monday – Friday** (excluding state holidays).

## How to Submit a Ticket

- **Email:** [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov)
- **Subject Line:** Must include “**Cardinal**”

## Help Us Serve You Faster

- **Provide Details:** Include a complete explanation, steps to replicate, and any relevant file/report names
- **Include Contact Info:** Your name, email, and best phone number
- **Screenshots:** Attach screenshots in a separate document
  - Always blur or crop out sensitive personal information
- **DO NOT:** Send encrypted email (e.g., Virtru) or copy other mailboxes on the ticket submission