

**Managing the Intra-Agency Transfer Process Overview**

The Transfer Employee business process refers to the movement of an employee from one position to another position. This Job Aid addresses how to transfer an employee from one position to another position within the same agency, otherwise known as an Intra-Agency Transfer.

The transfer of an employee represents several possible job changes such as a Promotion, Demotion, Voluntary Transfer, or a Reassignment. The corresponding Action/Action Reasons are used to capture the appropriate transaction.

This document has two sections.

1. The process to transfer an employee from a salaried position to a salaried position or a waged position to a wage position within the same agency;
2. The process to transfer an employee from a salaried position to wage position or a waged position to a salaried position within the same agency.

This document covers the process used to extract the transfer transaction once the job data is saved on the employee's job record.

The Cardinal HR module does not include management approval workflow, therefore all approvals shall take place outside of the system in accordance with applicable policy prior to processing transactions.

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**Transfer Employee from a Wage Position to a Wage Position or Salary Position to Salary Position**

Before beginning, ensure that all necessary data is accessible and ready for data entry.

1. **Navigate** to the **Job Data** page using the following path:

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

The **Job Data Search** page displays.

### Job Data

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

[Find an Existing Value](#)

▼ **Search Criteria**

<b>Empl ID</b>	begins with ▼	<input type="text"/>
<b>Empl Record</b>	= ▼	<input type="text"/>
<b>Name</b>	begins with ▼	<input type="text"/>
<b>Last Name</b>	begins with ▼	<input type="text"/>
<b>Second Last Name</b>	begins with ▼	<input type="text"/>
<b>Alternate Character Name</b>	begins with ▼	<input type="text"/>
<b>Middle Name</b>	begins with ▼	<input type="text"/>

**Include History**    **Correct History**    **Case Sensitive**

Limit the number of results to (up to 300):

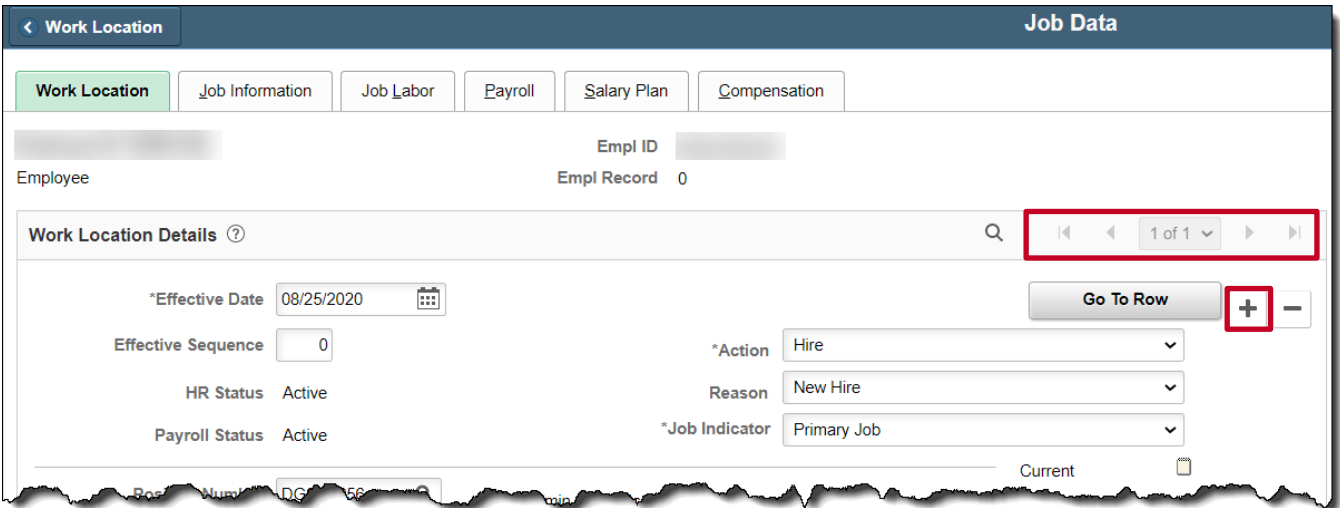
[Search](#)   [Clear](#)   [Basic Search](#)   [Save Search Criteria](#)

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

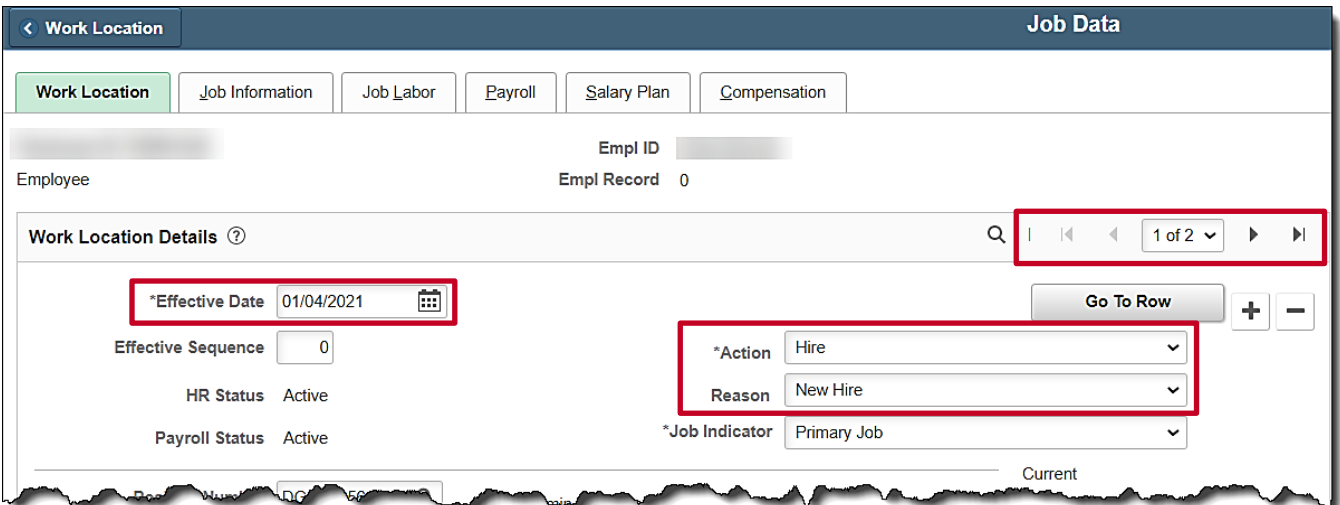
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Job Data' page with the 'Work Location' tab selected. The page displays employee information (Empl ID, Empl Record) and a table with one row. The 'Go To Row' button and the table navigation controls (1 of 1) are highlighted with red boxes.

4. Click the **Add a Row** icon.

The page refreshes and is now editable as a new effective dated row.



The screenshot shows the 'Job Data' page with the 'Work Location' tab selected. The page displays employee information (Empl ID, Empl Record) and a table with two rows. The 'Effective Date' field (01/04/2021), the 'Action' field (Hire), and the table navigation controls (1 of 2) are highlighted with red boxes.

5. The **Effective Date** field defaults to the current system date. Update this date to the applicable date of transfer as needed using the **Calendar** icon.

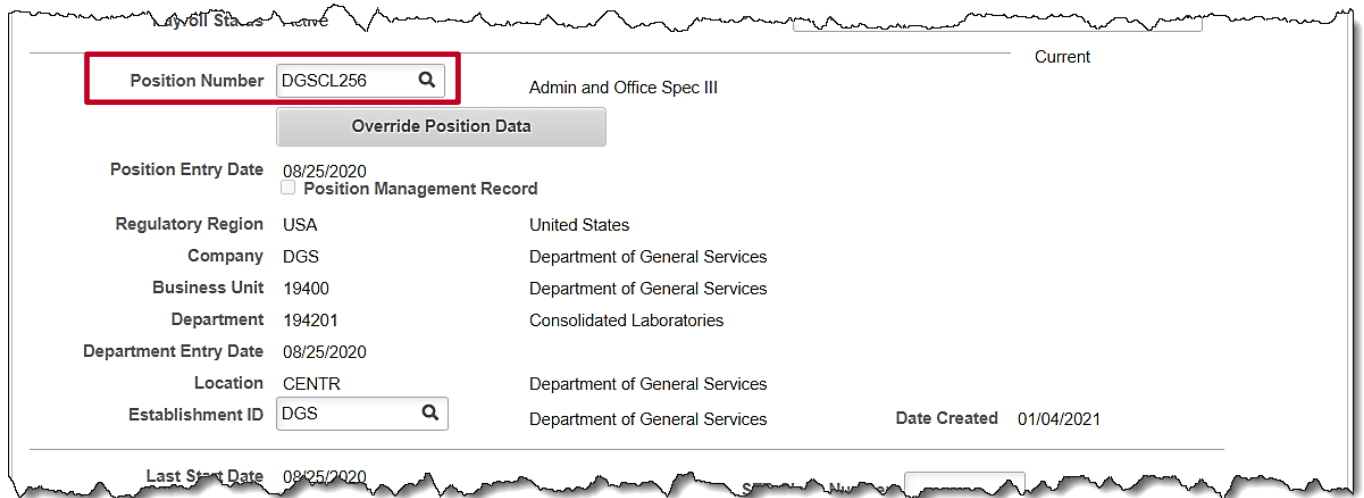
**Note:** For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. The Action defaults from the previous row. Select the applicable action of “**Transfer**” using the **Action** field dropdown button.

- Click the **Reason** field dropdown button and select the applicable “**Transfer In**” reason.

**Note:** The appropriate Action/Action Reason that best describes the hire/rehire reason is selected. The job aid entitled **HR351 Action Reason Codes** provides a list of valid action/action reason combinations. Additionally, for agencies previously using PMIS codes, a crosswalk is provided to help decide which Cardinal code to use. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

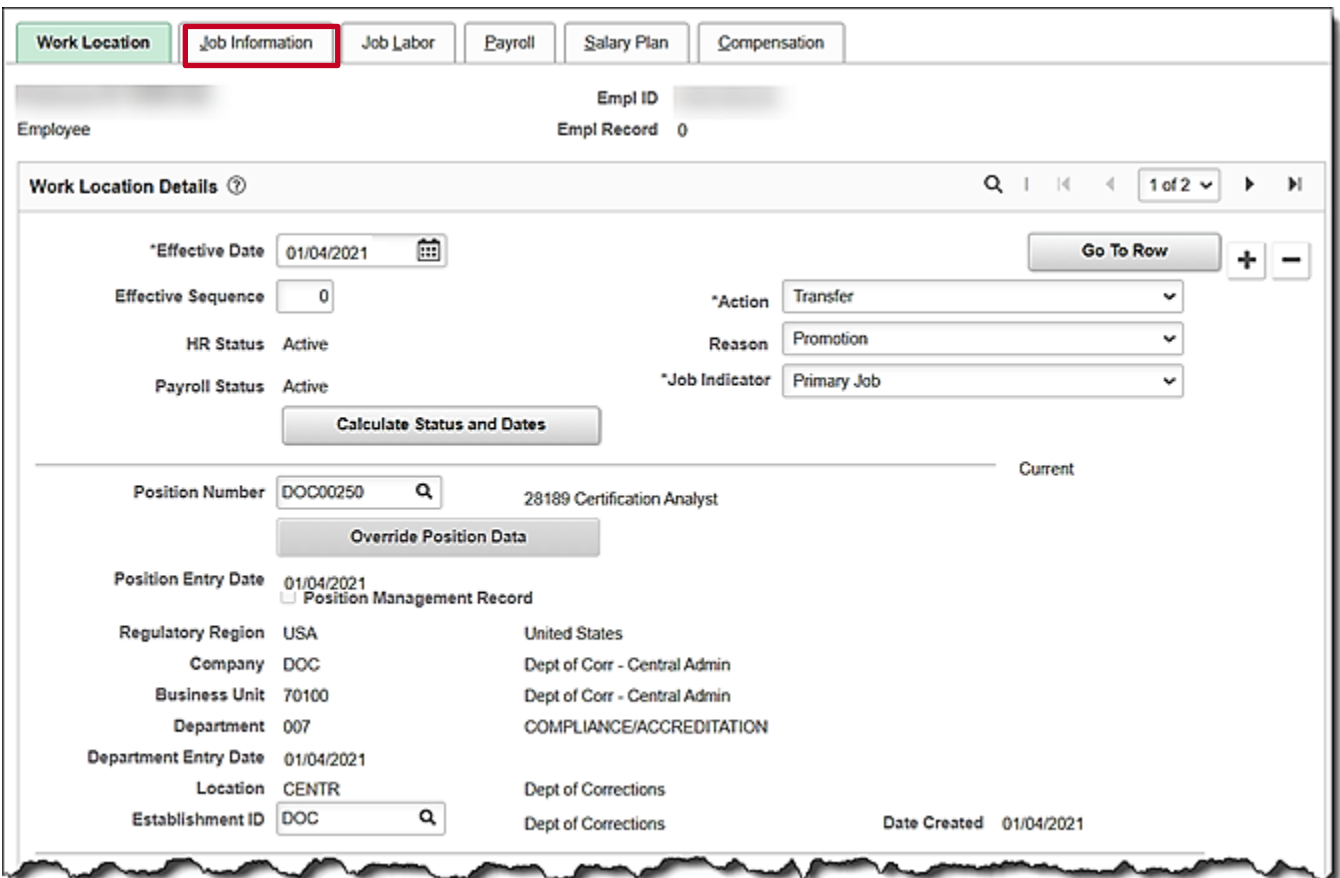
- Scroll down as needed and click in the **Position Number** field.



Position Number	DGSC256	Admin and Office Spec III	Current
<input type="button" value="Override Position Data"/>			
Position Entry Date	08/25/2020	<input type="checkbox"/> Position Management Record	
Regulatory Region	USA	United States	
Company	DGS	Department of General Services	
Business Unit	19400	Department of General Services	
Department	194201	Consolidated Laboratories	
Department Entry Date	08/25/2020		
Location	CENTR	Department of General Services	
Establishment ID	DGS	Department of General Services	Date Created 01/04/2021
Last Start Date	08/25/2020		

- Highlight the existing Position Number and enter/select the new Position Number in the **Position Number** field using the **Look Up** icon.
- Tab out of the field.

The page refreshes with the new data based on the Position selected.



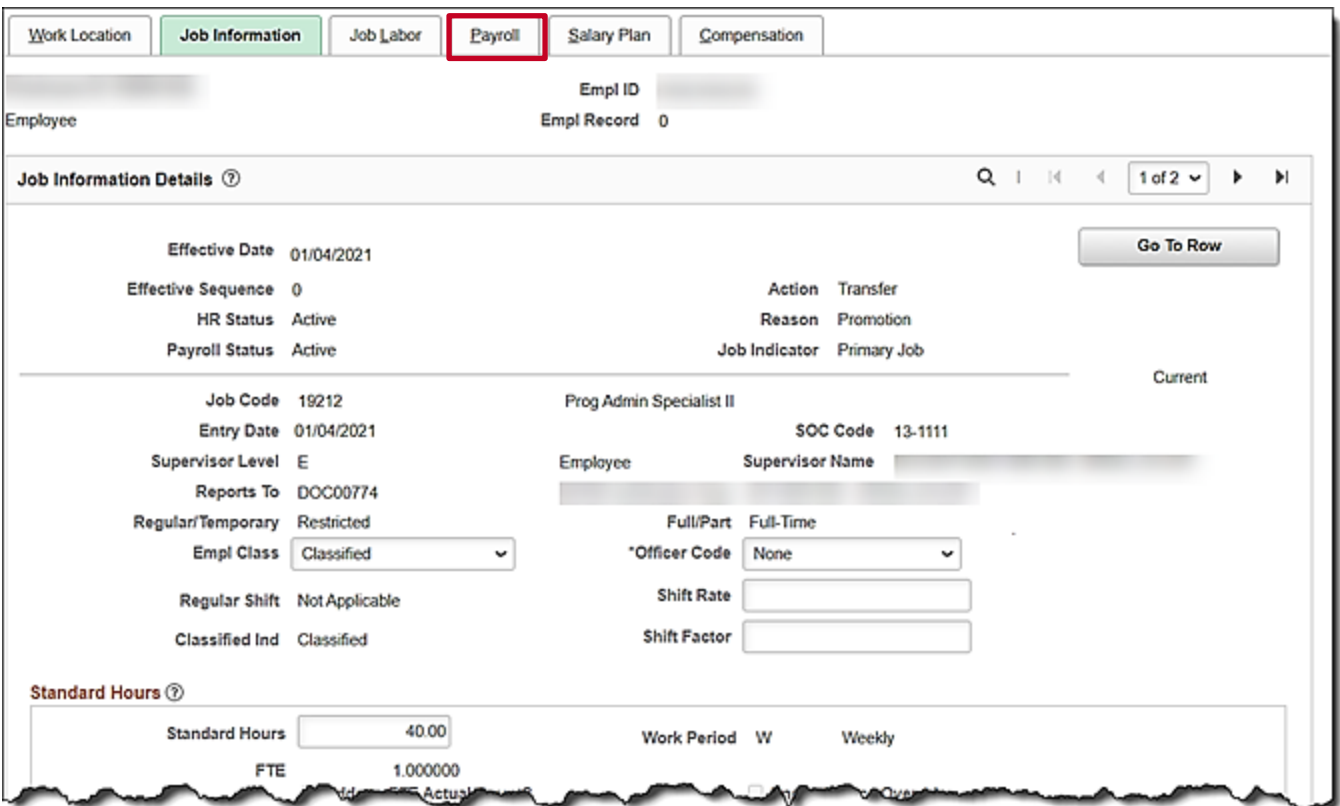
The screenshot shows the 'Job Information' tab selected in a web application. The 'Work Location Details' section is expanded, showing various fields and their values. The 'Position Number' field is highlighted with a search icon, and the 'Calculate Status and Dates' button is visible below it. The 'Action' dropdown is set to 'Transfer', 'Reason' to 'Promotion', and 'Job Indicator' to 'Primary Job'. The 'Position Number' is 'DOC00250', which corresponds to '28189 Certification Analyst'. Other fields include 'Effective Date' (01/04/2021), 'Effective Sequence' (0), 'HR Status' (Active), 'Payroll Status' (Active), 'Position Entry Date' (01/04/2021), 'Regulatory Region' (USA), 'Company' (DOC), 'Business Unit' (70100), 'Department' (007), 'Location' (CENTR), and 'Establishment ID' (DOC). The 'Date Created' is 01/04/2021.

- The remaining information populates based on the Position Number entered/selected. Review the information. If the Position Data is not correct, cancel the action and make corrections to the Position before assigning the employee to the position.

**Note:** For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

- If the Position Data is correct, click the **Job Information** tab.

The **Job Information** tab displays.



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

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

**Job Information Details** 1 of 2

Effective Date	01/04/2021	Action	Transfer
Effective Sequence	0	Reason	Promotion
HR Status	Active	Job Indicator	Primary Job
Payroll Status	Active		Current

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Job Code	19212	Prog Admin Specialist II	SOC Code	13-1111
Entry Date	01/04/2021	Employee	Supervisor Name	[Redacted]
Supervisor Level	E	Reports To	DOC00774	
Regular/Temporary	Restricted	Full/Part	Full-Time	
Empl Class	Classified	*Officer Code	None	
Regular Shift	Not Applicable	Shift Rate	[Input Field]	
Classified Ind	Classified	Shift Factor	[Input Field]	

**Standard Hours**

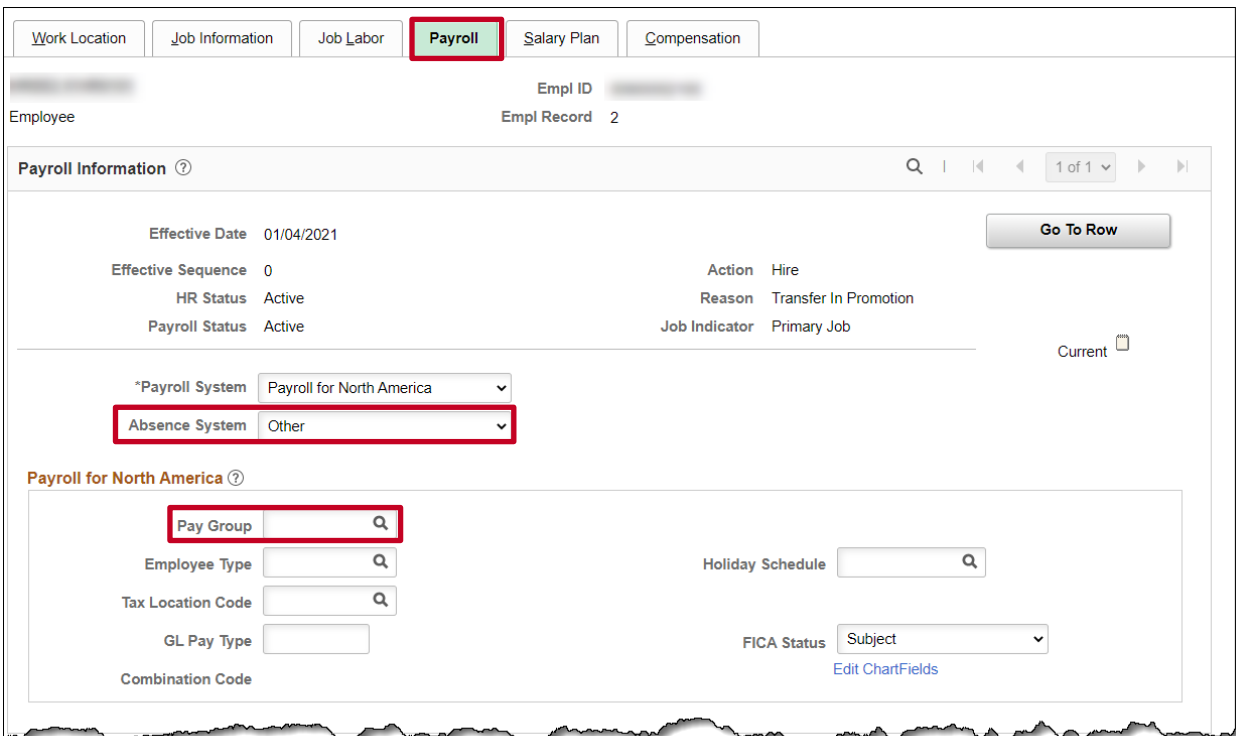
Standard Hours	40.00	Work Period	W	Weekly
FTE	1.000000			

- Review the job information. If the job information is not correct, cancel the action and make corrections to the Position before assigning the employee to the position.

**Note:** For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

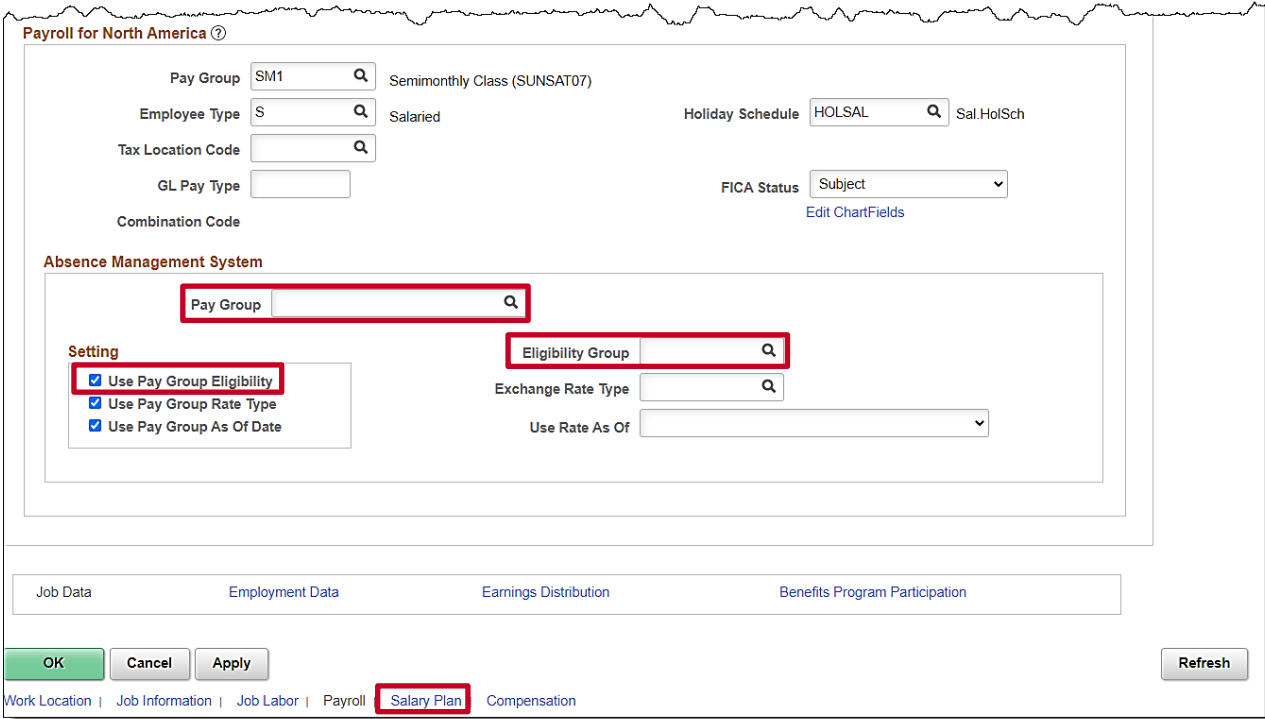
- If the job information is correct, click the **Payroll** tab.

The **Payroll** tab displays.



15. The **Absence System** field defaults to “**Other**”. If the agency uses Cardinal Absence Management, click the drop-down button and select “**Absence Management**”.  
**Note:** The **Absence Management** section is visible only if “**Absence Management**” is selected in the **Absence System** field, otherwise this section is hidden.
16. Enter/select the applicable Pay Group in the **Pay Group** field within the **Payroll for North America** section.  
**Note:** The options available within the **Pay Group** field are driven by the type of Absence System selected. It is, therefore, important to complete this page in order from top to bottom.

The page refreshes.



**Payroll for North America**

Pay Group: SM1 Semimonthly Class (SUNSAT07)  
 Employee Type: S Salaried  
 Holiday Schedule: HOLSAL Sal.HolSch  
 Tax Location Code: [ ]  
 GL Pay Type: [ ]  
 FICA Status: Subject  
 Combination Code: [ ]

**Absence Management System**

Pay Group: [ ]  
 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: [ ]

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

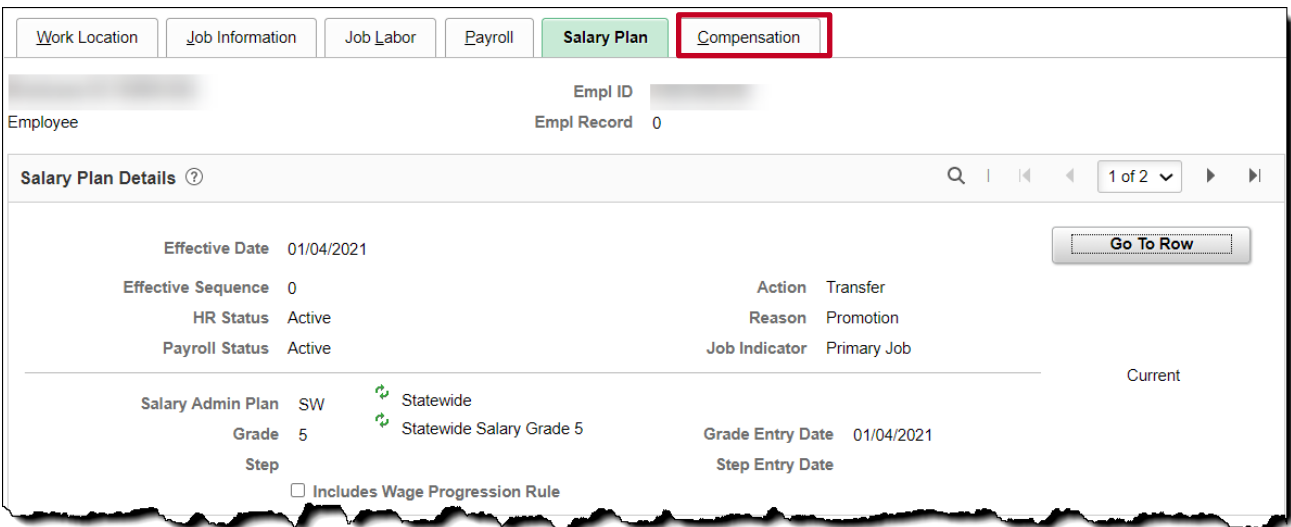
OK | Cancel | Apply | Refresh

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

**Note:** The **Employee Type** and **Holiday Schedule** fields default based on the Pay Group selection. The **Absence Management System** section only displays if “**Absence Management**” is selected in the **Absence System** field.

17. Enter/select the applicable Tax Location Code (previously known as the FIPS code) in the **Tax Location Code** field.
18. Enter/select the same Pay Group in the **Pay Group** field within the **Absence Management System** section as was selected in the **Pay Group** field within the **Payroll for North America** section if the Pay Group is not auto-populated.
19. De-select the **Use Pay Group Eligibility** checkbox.
20. Enter/select the appropriate Eligibility Group in the **Eligibility Group** field.
21. Once the payroll information is entered, click the **Salary Plan** link at the bottom of the page.
22. If the payroll information is correct, click the **Salary Plan** tab.

The **Salary Plan** tab displays.



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

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

**Salary Plan Details** ?

Effective Date: 01/04/2021 Go To Row

Effective Sequence: 0      Action: Transfer  
HR Status: Active      Reason: Promotion  
Payroll Status: Active      Job Indicator: Primary Job

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Salary Admin Plan: SW      Statewide  
Grade: 5      Statewide Salary Grade 5      Grade Entry Date: 01/04/2021  
Step:      Step Entry Date:       Includes Wage Progression Rule

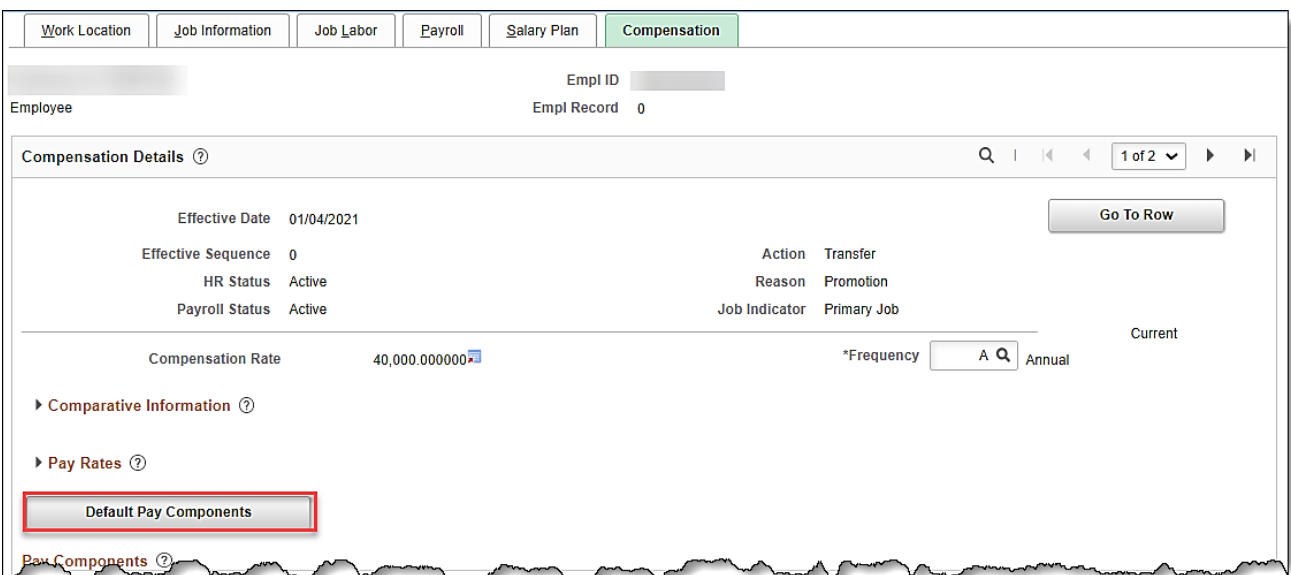
Current

23. Review the salary plan information. If the salary plan information is not correct, cancel the action and make corrections to the Position before assigning the employee to the position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion.

**Note:** For further information on updating Position Data, see the Job Aid titled **HR351 Managing a Position**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

24. If the salary plan information is correct, click the **Compensation** tab.

The **Compensation** tab displays.



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

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

**Compensation Details** ?

Effective Date: 01/04/2021 Go To Row

Effective Sequence: 0      Action: Transfer  
HR Status: Active      Reason: Promotion  
Payroll Status: Active      Job Indicator: Primary Job

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Compensation Rate: 40,000.000000      \*Frequency: A Annual

▶ Comparative Information ?

▶ Pay Rates ?

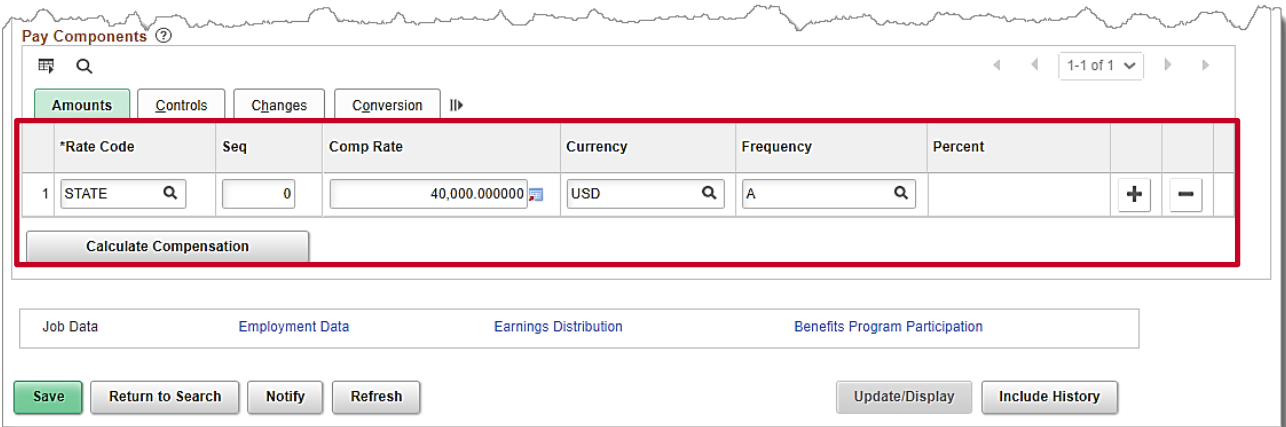
**Default Pay Components**

Pay Components ?

25. Review and update the compensation information for the employee as needed. If no updates are needed, proceed to step 31.

26. Click the **Default Pay Components** button.
27. Scroll down on the page to the **Pay Components** section.

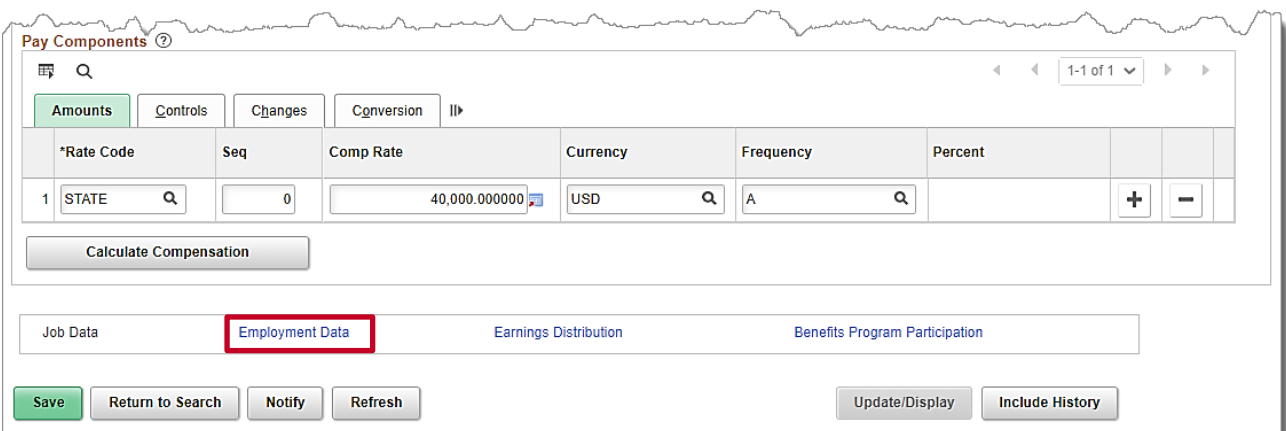
The remaining information displays.



*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 STATE	0	40,000.000000	USD	A		+	-

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History

28. Update the **Rate Code** field as needed using the **Look Up** icon.
29. Highlight the existing compensation rate and enter the new compensation rate in the **Comp Rate** field as needed.
30. Verify the **Frequency** field as needed using the **Look Up** icon.



*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 STATE	0	40,000.000000	USD	A		+	-

Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History

Links: Job Data, **Employment Data**, Earnings Distribution, Benefits Program Participation

31. Click the **Employment Data** link at the bottom of the page.

The **Employment Information** page displays.

Employment Information

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Employee
Empl ID

Empl Record 0

**Organizational Instance** ?

Organizational Instance Rcd 0	Original Start Date 08/25/2020	<input type="checkbox"/> Override
Last Start Date 08/25/2020	First Start Date 08/25/2020	
Termination Date	Years Months Days	
Org Instance Service Date 08/25/2020	<input type="checkbox"/> Override <span style="color: green;">↻</span>	0 4 14

**Organizational Assignment Data** ?

**Instance Record**

Last Assignment Start Date 08/25/2020	First Assignment Start 08/25/2020
Assignment End Date	
Home/Host Classification Home	Years Months Days <span style="color: blue;">Time Reporter Data</span>
Company Seniority Date 08/25/2020	<input type="checkbox"/> Override <span style="color: green;">↻</span> 0 4 14
Benefits Service Date 08/25/2020	<input type="checkbox"/> Override <span style="color: green;">↻</span> 0 4 14
Seniority Pay Calc Date 08/25/2020	<input type="checkbox"/> Override <span style="color: green;">↻</span> 0 4 14
Probation Date <input type="text" value=""/>	
Professional Experience Date <input type="text" value=""/>	Last Verification Date <input type="text" value=""/>
Business Title 28189 Certification Analyst	Position Phone

\*Work Mode 
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" value="06/10/2001"/>
Leave Eligibility Service Date	<input type="text" value="06/10/2001"/>
Previous Months Of Service	<input type="text" value=""/>

USA

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

32. Review the employment information and validate for accuracy.

33. Click the Benefits Program Participation link.

The Benefits Program Participation page displays.

Benefit Program Participation

Employee
Empl ID

Empl Record 0

Benefit Status ?
1 of 2

Benefit Record Number 0 Go To Row

Effective Date 01/04/2021

Effective Sequence 0      Action Transfer

HR Status Active      Reason Promotion

Payroll Status Active      Job Indicator Primary Job

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\*Benefits System Benefits Administration      Current

Annual Benefits Base Rate  USD      Benefits Employee Status Active

[ACA Eligibility Details](#)

Benefits Administration Eligibility ?

BAS Group ID

Elig Fld 1 UNN0000

Elig Fld 2

Elig Fld 3 Y

Elig Fld 4

Elig Fld 5

Elig Fld 6 11194

Elig Fld 7

Elig Fld 8 12-24

Elig Fld 9 SF-GB

Benefit Program Participation Details ?
1 of 1
View All

\*Effective Date 11/10/2019      Currency Code USD      + -

\*Benefit Program SAL      Salaried Employee Benefit Pgm

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

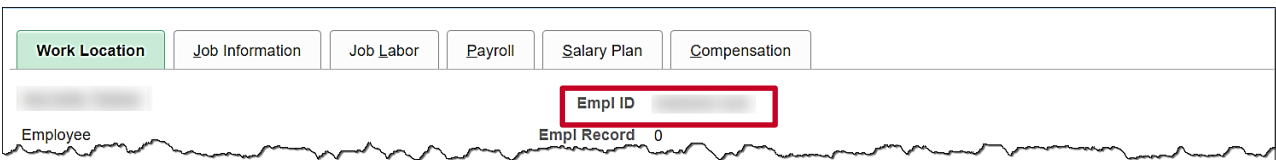
Save
Return to Search
Previous in List
Next in List
Notify
Refresh
Update/Display
Include History
Correct History

34. Review the Benefits Program Participation information and validate for accuracy.

**Note:** If any of the Benefits Program Participation information is not correct, coordinate with a Benefits Administrator. For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility of Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

35. Click the **Save** button.

The **Work Location** tab returns.



Work Location Job Information Job Labor Payroll Salary Plan Compensation

Empl ID

Employee Empl Record 0

36. Highlight the Employee ID and right click the mouse to copy the employee ID.
37. To run the HR Activity Report for the employee, use the following navigation:  
**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**
38. Run the HR Activity Report for the employee.  
**Note:** For further information on Reports, see the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources**.
39. Print the report and place the printed transaction in the employee file for future audit requests.

**Transfer Employee from a Wage Position to a Salary Position or a Salary Position to a Wage Position**

Before beginning, ensure that all necessary data is accessible and ready for data entry.

1. **Navigate** to the **Job Data** page using the following path:

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

The **Job Data Search** page displays.

### Job Data

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

[Find an Existing Value](#)

▼ **Search Criteria**

<b>Empl ID</b>	begins with ▼	<input type="text"/>
<b>Empl Record</b>	= ▼	<input type="text"/>
<b>Name</b>	begins with ▼	<input type="text"/>
<b>Last Name</b>	begins with ▼	<input type="text"/>
<b>Second Last Name</b>	begins with ▼	<input type="text"/>
<b>Alternate Character Name</b>	begins with ▼	<input type="text"/>
<b>Middle Name</b>	begins with ▼	<input type="text"/>

**Include History**    **Correct History**    **Case Sensitive**

Limit the number of results to (up to 300):

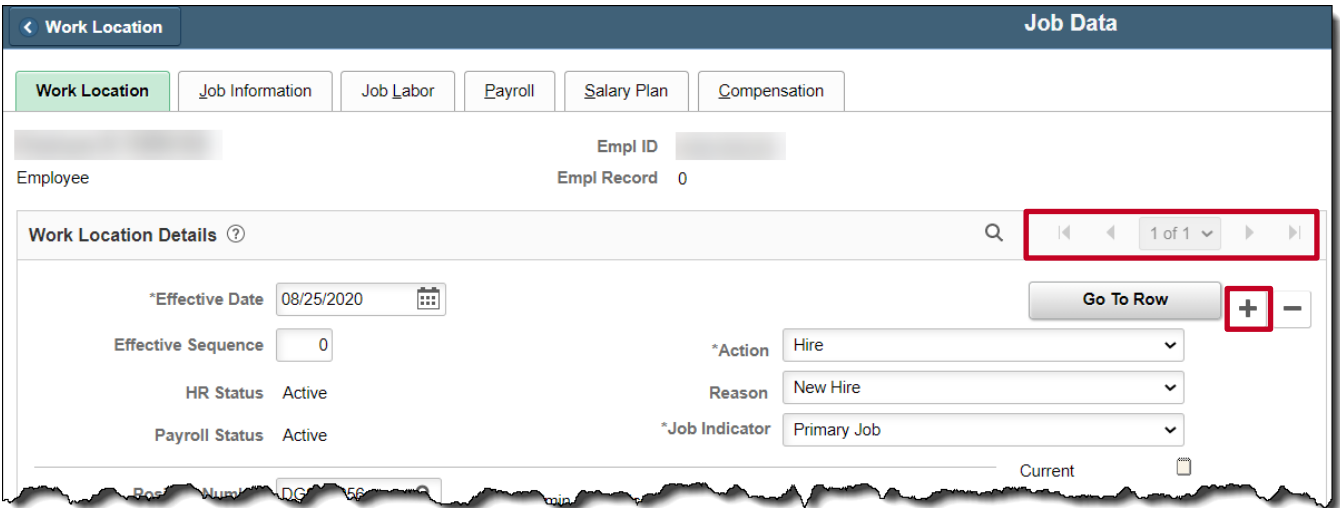
[Search](#)   [Clear](#)   [Basic Search](#)   [Save Search Criteria](#)

2. Search for the applicable employee by entering the Employee ID or known portion of the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

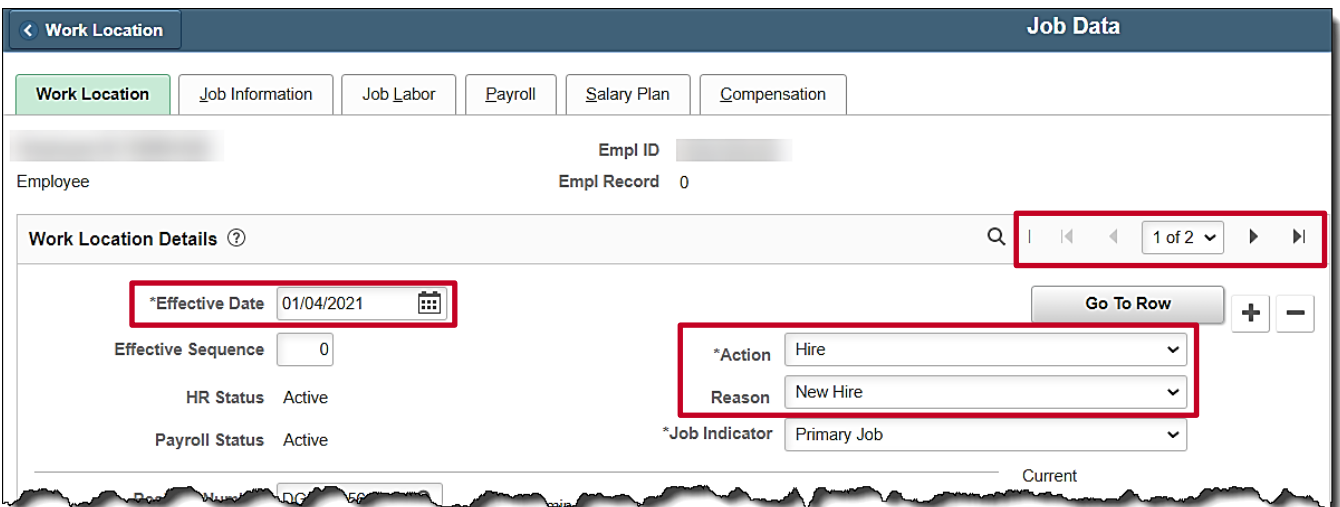
3. Click the **Search** button.

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



4. Click the **Add a Row** icon.

The page refreshes and is now editable as a new effective dated row.

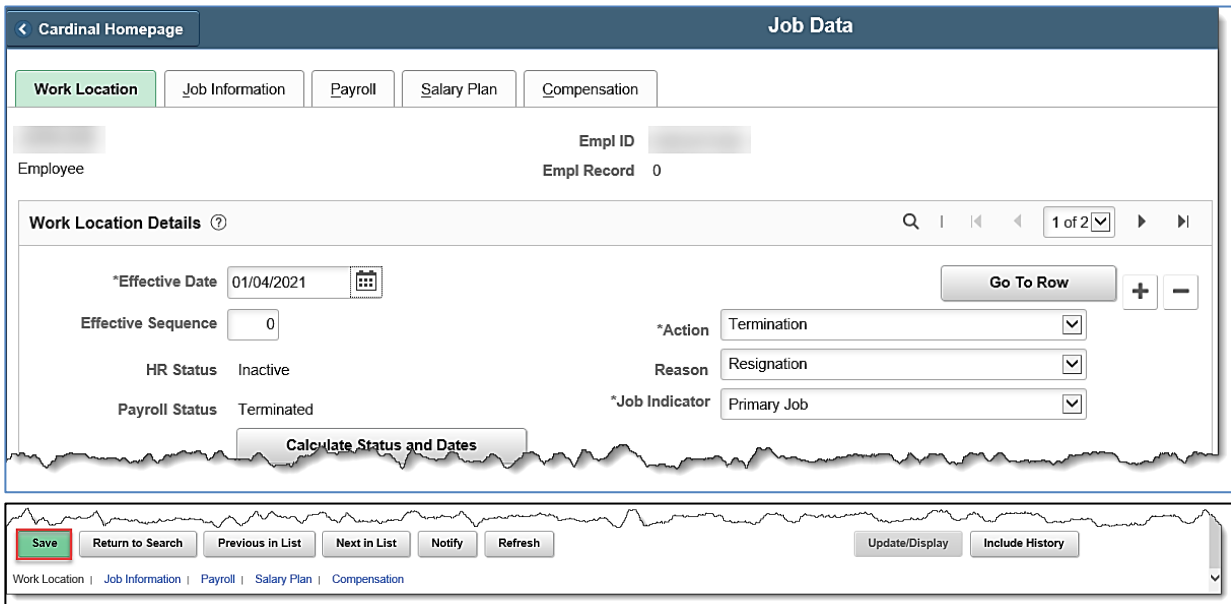


5. The **Effective Date** field defaults to the current system date. Update this date to the applicable date of transfer as needed using the **Calendar** icon.

**Note:** 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**.

6. The Action defaults from the previous row. Select the applicable action of “**Termination**” using the **Action** field dropdown button.

- Click the **Reason** field dropdown button and select “**Resignation**” as the termination reason.



Cardinal Homepage Job Data

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

Employee Empl ID [redacted]  
Empl Record 0

Work Location Details 1 of 2

\*Effective Date: 01/04/2021 Go To Row + -

Effective Sequence: 0 \*Action: Termination

HR Status: Inactive Reason: Resignation

Payroll Status: Terminated \*Job Indicator: Primary Job

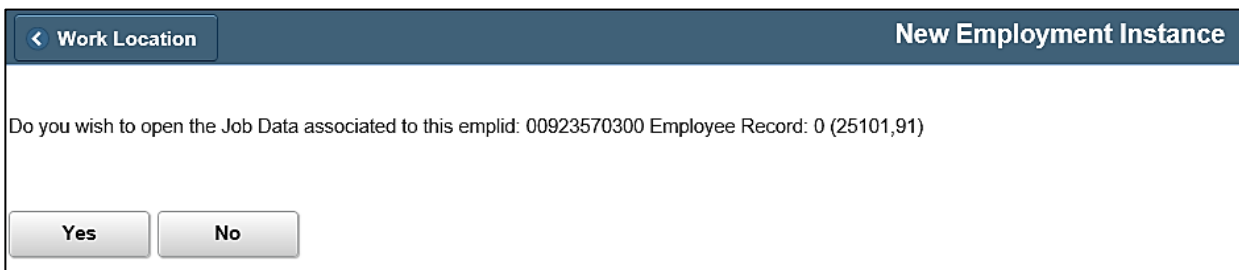
Calculate Status and Dates

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

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

- Click the **Save** action.
- Navigate** to the **Job Data** page using the following path:  
**Navigator > Workforce Administration > Personal Information > Organizational Relationship > New Employee Instance**

A message displays.



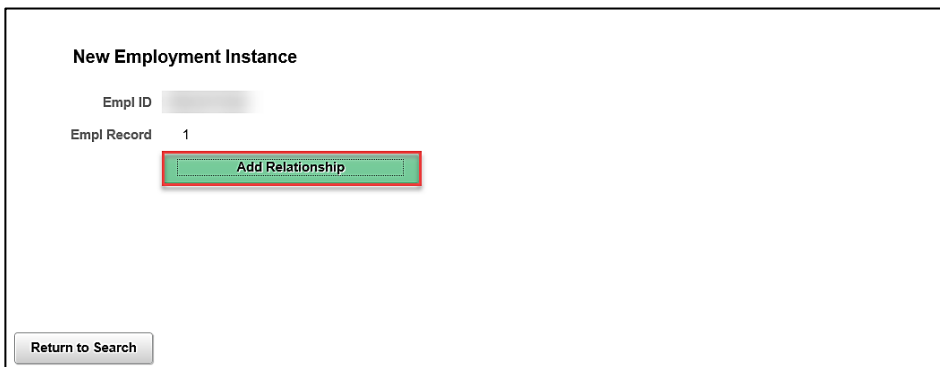
Work Location New Employment Instance

Do you wish to open the Job Data associated to this emplid: 00923570300 Employee Record: 0 (25101,91)

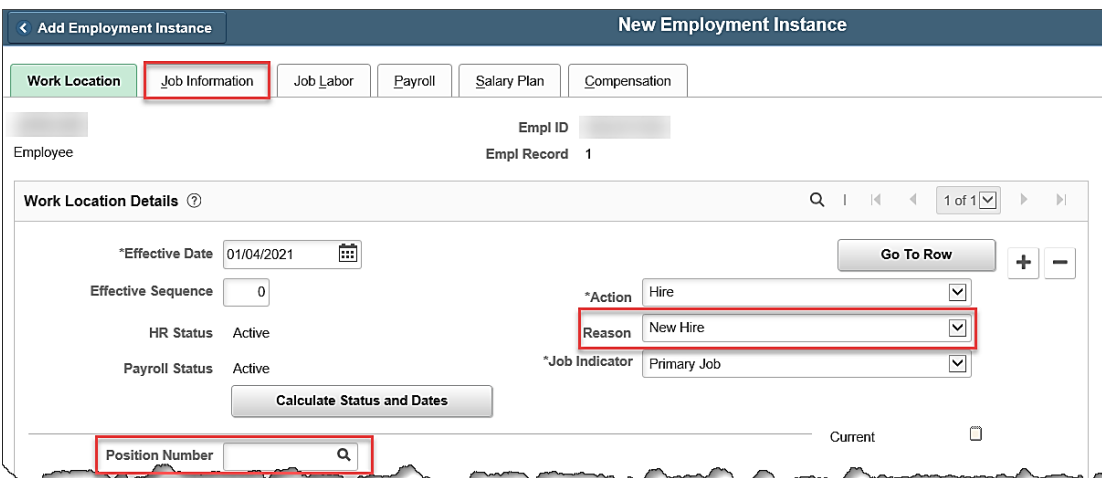
Yes No

- Select **No** to add a new Job Record with a new Employee Record.

The **New Employment Instance** page is displayed.



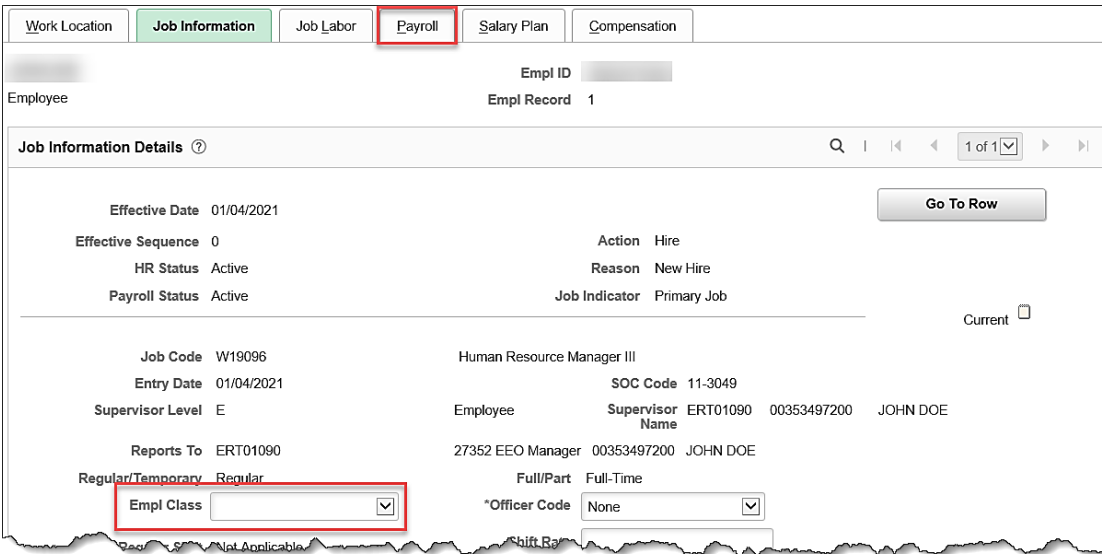
10. Click on the **Add Relationship** radio button.



**Note:** In the example above the Empl Record is displayed as 1, the effective date has been updated to 01/04/2021, the action defaulted to hire.

11. Select **New Hire** as the reason.
12. Place the cursor in the **Position Number** field and enter/select the new Position Number using the **Look Up** icon.
13. Tab out of the field.
14. Click the **Job Information** tab.

The **Job Information** tab displays.



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

Empl ID [redacted]  
Employee [redacted] Empl Record 1

**Job Information Details** ?

Effective Date 01/04/2021 Go To Row

Effective Sequence 0 Action Hire

HR Status Active Reason New Hire

Payroll Status Active Job Indicator Primary Job

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Job Code W19096 Human Resource Manager III

Entry Date 01/04/2021 SOC Code 11-3049

Supervisor Level E Employee ERT01090 00353497200 JOHN DOE

Supervisor Name ERT01090 00353497200 JOHN DOE

Reports To ERT01090 27352 EEO Manager 00353497200 JOHN DOE

Regular/Temporary Regular Full/Part Full-Time

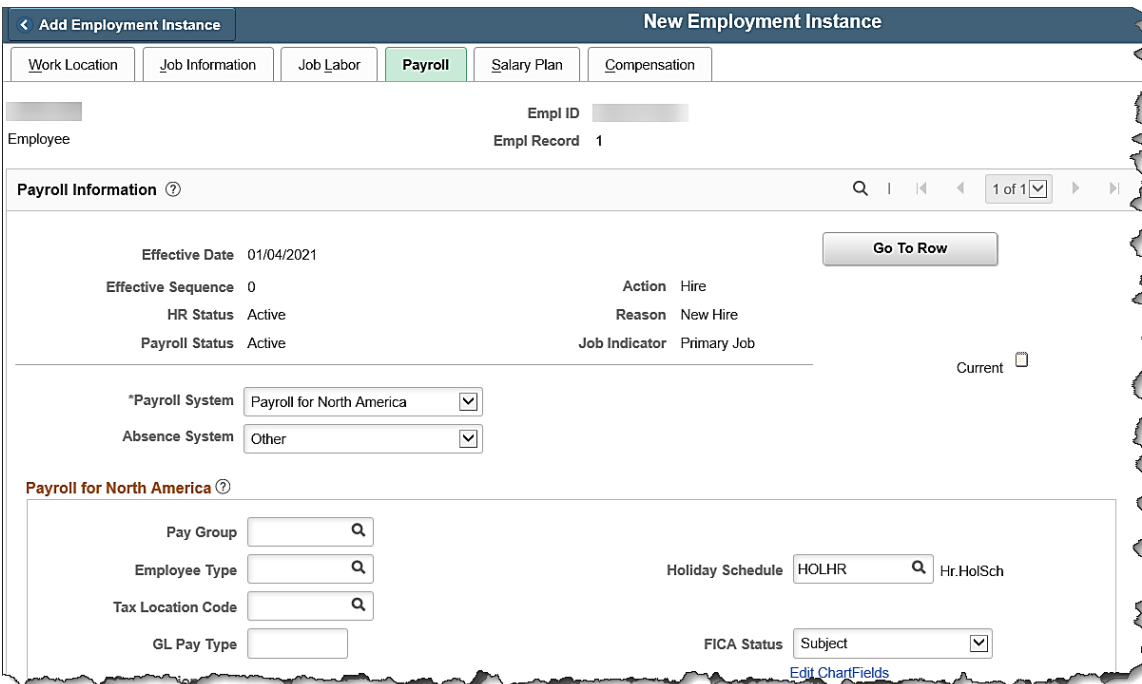
**Empl Class** [dropdown menu] \*Officer Code None [dropdown menu]

Not Applicable Shift Ba [dropdown menu]

15. Click in the **Empl Class** field and select the applicable employee class for the position.

16. If the job information is correct, click the **Payroll** tab.

The **Payroll** tab displays.



< Add Employment Instance New Employment Instance

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

Empl ID [redacted]  
Employee [redacted] Empl Record 1

**Payroll Information** ?

Effective Date 01/04/2021 Go To Row

Effective Sequence 0 Action Hire

HR Status Active Reason New Hire

Payroll Status Active Job Indicator Primary Job

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\*Payroll System Payroll for North America [dropdown menu]

Absence System Other [dropdown menu]

**Payroll for North America** ?

Pay Group [input field] Q

Employee Type [input field] Q

Tax Location Code [input field] Q

GL Pay Type [input field]

Holiday Schedule HOLHR [input field] Q Hr.HolSch

FICA Status Subject [dropdown menu]

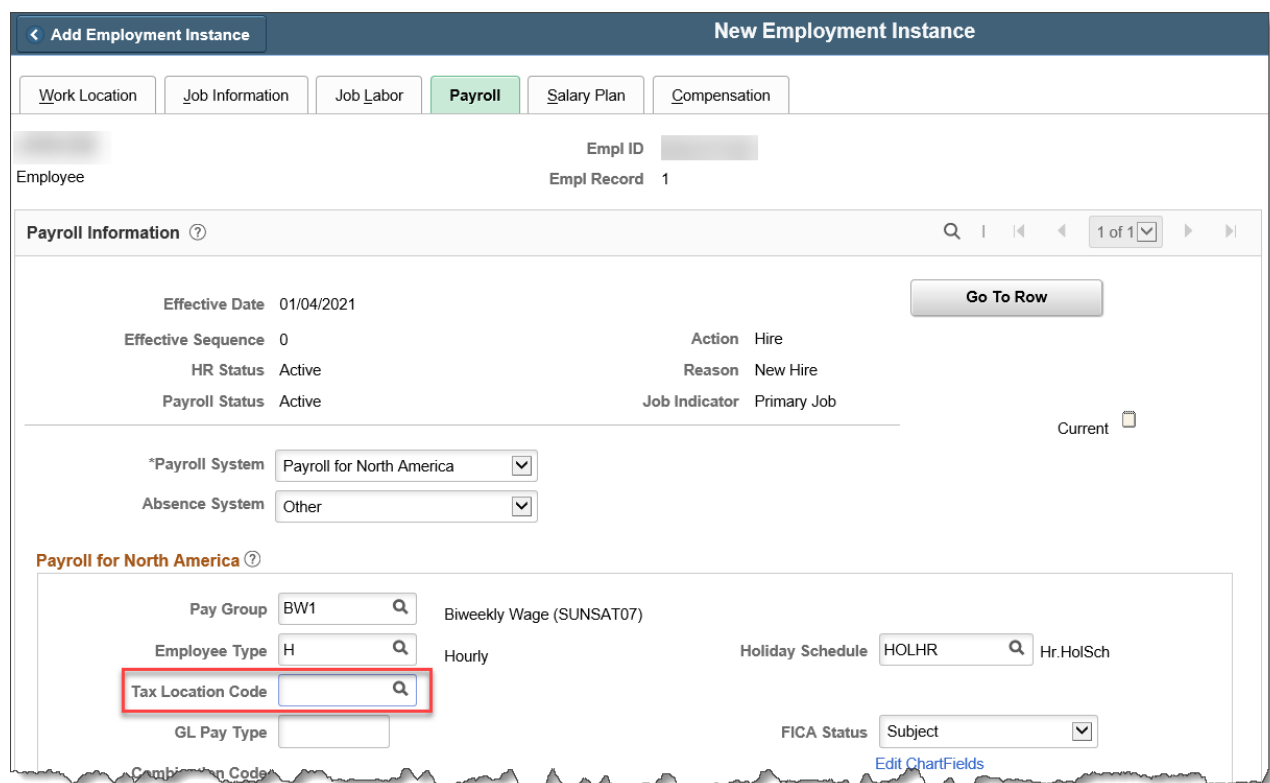
[Edit ChartFields](#)

17. The **Payroll System** field defaults to “Payroll for North America”. Do not change.

- The **Absence System** field defaults to “Other”. If the new employee’s Agency uses the Cardinal Absence System, select “Absence Management” from the corresponding dropdown list. If the new employee’s Agency uses any absence management system besides the Cardinal Absence System, verify “Other” is selected in the **Absence System** field.
- Select the applicable Pay Group using the **Pay Group Look Up** icon within the **Payroll for North America** section.

**Note:** FICA Status defaults to Subject, if the agency is using Cardinal Absence Management this value will remain as defaulted in.

The page refreshes once the **Pay Group** is selected.



**New Employment Instance**

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

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 1

**Payroll Information** ?

Effective Date: 01/04/2021 **Go To Row**

Effective Sequence: 0 Action: Hire  
HR Status: Active Reason: New Hire  
Payroll Status: Active Job Indicator: Primary Job

\*Payroll System: Payroll for North America  
Absence System: Other

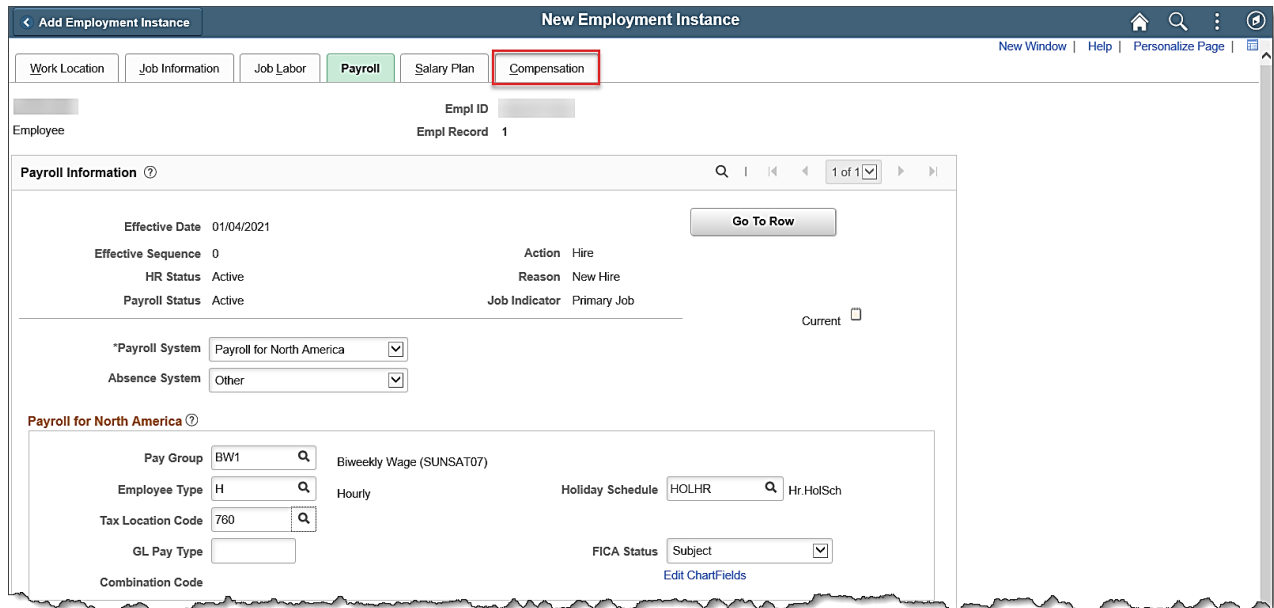
**Payroll for North America** ?

Pay Group: BW1 Biweekly Wage (SUNSAT07)  
Employee Type: H Hourly  
Tax Location Code: [Redacted]  
Holiday Schedule: HOLHR Hr.HolSch  
GL Pay Type: [Redacted] FICA Status: Subject

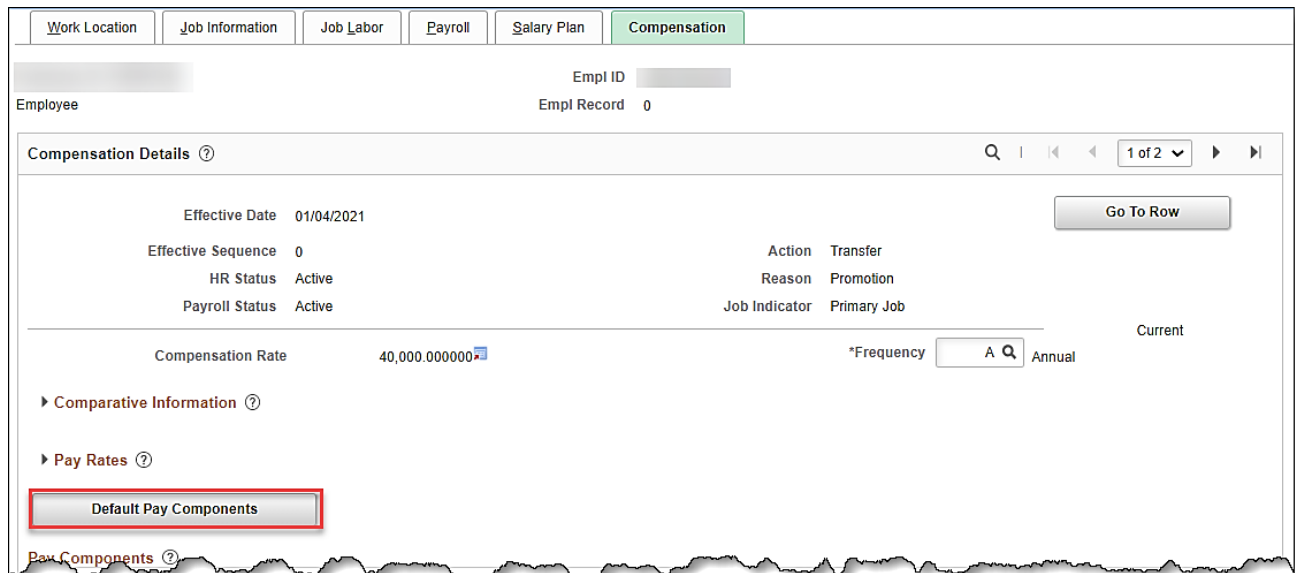
[Edit ChartFields](#)

- Select the applicable Tax Location Code using the **Tax Location Look Up** icon within the **Payroll for North America** section.

The page refreshes once the **Pay Group** is selected.

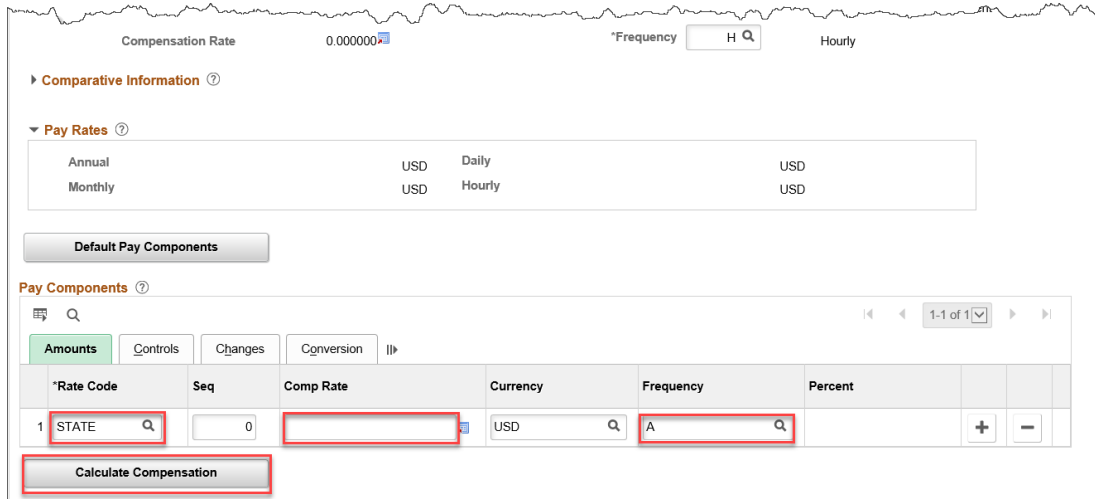


The **Compensation** tab displays.



21. Change the **Frequency** as applicable.
22. Click the **Default Pay Components** button.
23. Scroll down on the page to the **Pay Components** section.

The remaining information displays.



Compensation Rate: 0.000000  
\*Frequency: H  
Hourly

► Comparative Information ⓘ

▼ Pay Rates ⓘ

Annual	USD	Daily	USD
Monthly	USD	Hourly	USD

Default Pay Components

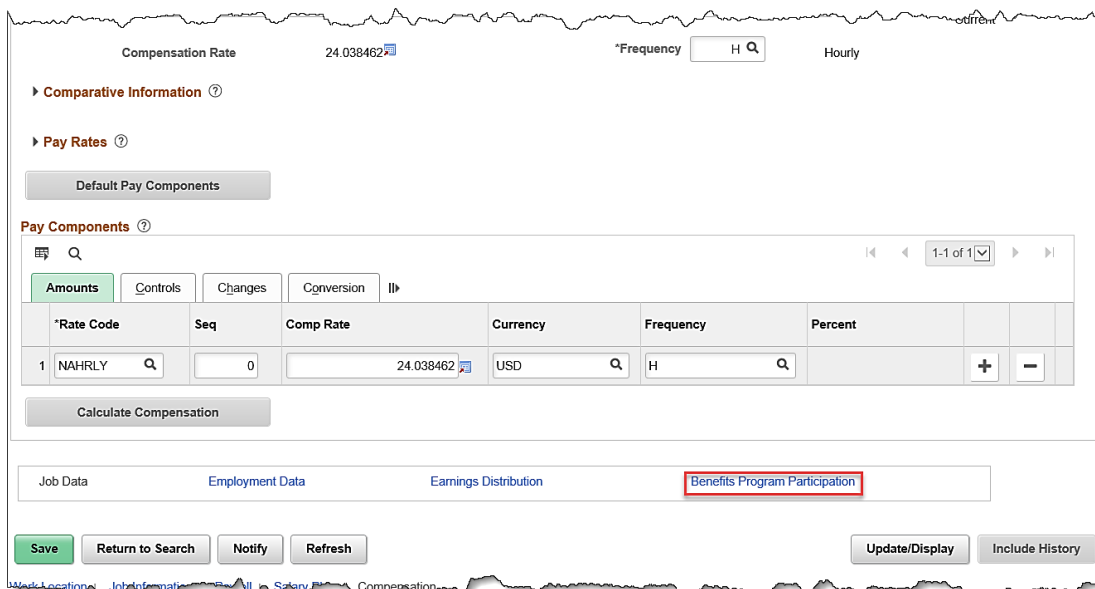
Pay Components ⓘ

Amunts Controls Changes Conversion

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 STATE	0		USD	A	

Calculate Compensation

24. Update the **Rate Code** field as needed using the **Look Up** icon.
25. Highlight the existing compensation rate and enter the new compensation rate in the **Comp Rate** field as needed.
26. The **Frequency** field will default to the applicable value.



Compensation Rate: 24.038462  
\*Frequency: H  
Hourly

► Comparative Information ⓘ

► Pay Rates ⓘ

Default Pay Components

Pay Components ⓘ

Amunts Controls Changes Conversion

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAHRLY	0	24.038462	USD	H	

Calculate Compensation

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

Save Return to Search Notify Refresh Update/Display Include History

27. Click the **Benefits Program Participation** link at the bottom of the screen.

The **Benefits Program Participation** page displays.

< Add Employment Instance
New Employment Instance

**Benefit Program Participation**

Employee
Empl ID [REDACTED]

Empl Record 1

**Benefit Status** 1 of 1

Benefit Record Number 0
Go To Row

Effective Date 01/04/2021
Action Hire

Effective Sequence 0
Reason New Hire

HR Status Active
Job Indicator Primary Job

Payroll Status Active
Current

\*Benefits System Benefits Administration
Benefits Employee Status Active

Annual Benefits Base Rate  USD
ACA Eligibility Details

**Benefits Administration Eligibility**

BAS Group ID

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

**Benefit Program Participation Details** 1 of 1

\*Effective Date 11/15/2020
Currency Code USD

\*Benefit Program PSX
Sys delivered empty Ben Pgm

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

OK
Cancel
Apply

28. The **Elig Fld 1** field is updated when the VRS VNAV Upload runs on a monthly basis after the employee selects benefits. The field is updated manually **ONLY** when the upload creates an error for the employee. No data entry is required unless correcting the error.
29. Click the **Elig Fld 2 Look Up** icon and select the applicable Healthcare Group ID (Department value). These values are provided to the health benefit vendors and reflect the group in which the employee is enrolled (DHRM provided 9-digit number).

30. Click the **Elig Fld 3 Look Up** icon and make the applicable selection based on who will be entering time for the employee.
31. The **Elig Fld 6** (free form text) field is updated when the VRS VNAV Upload runs on a monthly basis after the employee selects benefits. The field is updated manually **ONLY** when the upload creates an error for the employee. No data entry is required unless correcting the error.
32. Click the **Elig Fld 8 Look Up** icon and select the applicable pay sheet value. (i. e., 12 - 24)
33. Click the **Elig Fld 9 Look Up** icon. These values represent the nature of the employee and how the employee health premiums are paid. Select the breakdown of how the benefits payment will be split between the employee (EE) and the employer (ER).

**Note:** For further information on eligibility configuration valid values, refer to the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

34. Scroll down as needed and review the **Benefits Program Participation Details** section and validate for accuracy.

**Note:** Before clicking the **OK** button, review all Job Information. Once the **OK** button is clicked, the record is saved and anything entered incorrectly will require a help desk ticket for correction.

35. Click the **OK** button.
36. To run the **Employee Activity Report** for the employee, use the following navigation:  
**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**
37. Run the **Employee Activity Report** for the selected employee.

**Note:** For additional information on the Employee Activity Report, see the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources**.

38. Print the report and place the printed transaction in the employee file for future audit requests.