

Managing an Inter-Agency Transfer Overview

The Transfer Employee business process refers to the movement of an employee from one position to another position. This Job Aid addresses the following transfer transaction, otherwise known as Inter-Agency Transfers:

- An employee transfers from one state Agency to another state Agency

Coordination between the Sending and Receiving Agencies is imperative as the effective dates and Action/Reasons of the transactions must be entered correctly by both Agencies to prevent inaccurate breaks in service and healthcare. The Sending Agency should enter a Termination/Transfer Out transaction and the Receiving Agency should enter a Hire/Transfer In (XXX) transaction. The Sending Agency enters the transfer date (i.e., termination/transfer out effective date) as the day after last day worked (i.e., transfer date is 1/1/2020, but last day worked was 12/31/2020). The Receiving Agency must use the same date or the next day to prevent a break in service. The DHRM Policy Team recommends the following:

“The Receiving Agency should consult with the Sending Agency and determine the resignation/separation date. If there is a difference that involves a few days, then we encourage the former agency to approve the employee's use of LWOP and expand the separation date so there is no break in service.”

If applicable, the Receiving Agency must also update the employee's Agency Provided Email address in Personal Data, update the employee's telework agreement and process a leave balance adjustment.

All salaried employees who are transferring from one Agency to another must be terminated from their Sending Agency prior to being hired into their Receiving Agency. When these employees are in active salaried positions in both Agencies, Anthem, Aetna, and other healthcare providers receive data files that show the employee as active in two Agencies, which results in both records cancelling. When this data mismatch occurs, the healthcare vendors do not receive the updated information regarding the Agency change and the transferring employee loses health benefits coverage.

Transferring an employee from one Agency to another, the Agency Benefits Administrator will need to review benefit elections of the employee once the transfer to the Receiving Agency is complete. See the Job Aid titled **BN361_Managing Terminations and Transfers** for more details. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

If the Receiving Agency uses Cardinal Absence Management, the HR Administrator of the Receiving Agency should request the salaried employee's leave balances as of the date of transfer from the Sending Agency. Leave balances do not transfer automatically in Cardinal, therefore the Receiving Agency will have to process a balance adjustment in the Time and Attendance module when the transfer is complete. For further details on balance adjustments, see the Job Aid titled **TA374_Managing Absence Balances**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.



As of 11/11/2022, per DHRM policy, Service Credit for Annual Leave Accruals, the annual leave accrual rate is determined by using state service and a veteran’s service in the military, National Guard or Reserves. A Veteran’s service is determined by adding the net active service, total prior active service, and total prior inactive service data found on the form DD-214. To assist in identifying employees who are eligible, the RHR294-Disability and Veteran Service Report can be used. In order to run this report, the user must have the manager role due to the disability information on the report.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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Revision History

Revision Date	Summary of Changes
4/29/2025	Updated the screenshot of the Benefit Program Participation page (Section 1 , after Step 36), updated the screenshot of the Benefits Administration Eligibility section (Section 1 , step 38), and added additional information regarding the Eligibility Fields.
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1; Section 2 , after Step 1; Section 3 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Sending Agency Tasks

Termination/Transfer Out

Before beginning, the Sending Agency must coordinate the termination effective date with the Receiving Agency.

Step	Action
1.	Navigate to the Job Data page using the following path: NavBar > Menu > Workforce Administration > Job Information > Job Data

The **Job Data Find an Existing Value** page displays.

Job Data

Find an Existing Value

▼ **Search Criteria**

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

🕒 Recent Searches Choose from recent searches ✎
🔖 Saved Searches Choose from saved searches ✎

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

^ Show fewer options

Case Sensitive Include History Correct History

	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
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2.	<p>Search for the applicable employee by entering the Employee ID in the Empl ID field.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> <p>▼ Search Criteria</p> <div style="border: 2px solid red; padding: 2px; display: inline-block;"> Empl ID begins with <input type="text" value=""/> </div> <p>Empl Record = <input type="text" value=""/></p> </div>
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	Users can also search by Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.
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Human Resources Job Aid

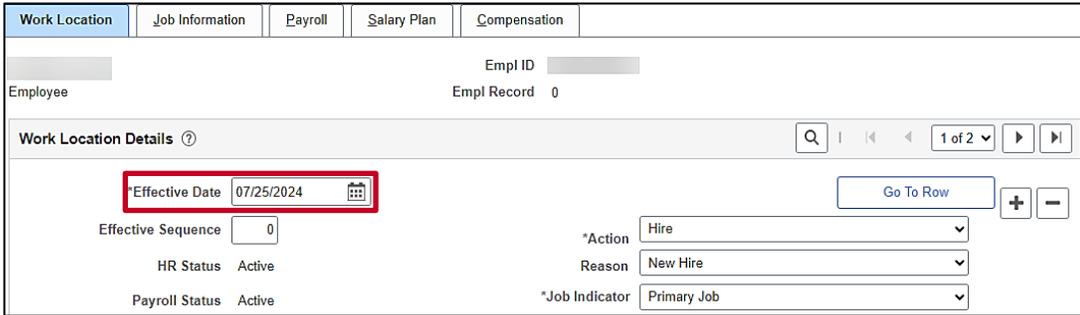
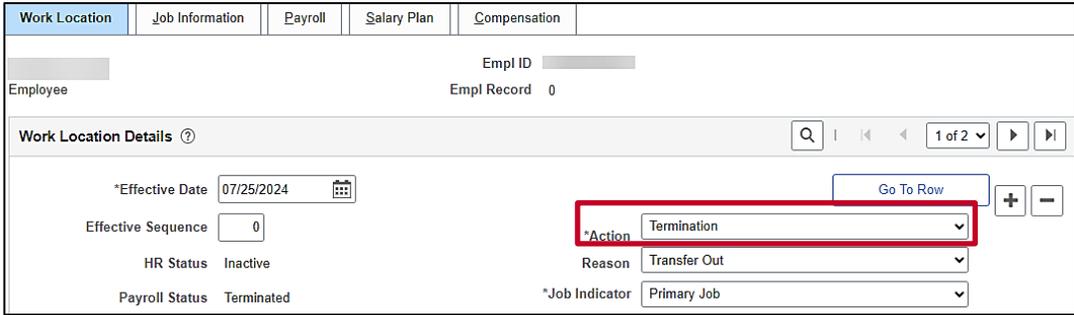
HR351_Managing an Inter-Agency Transfer

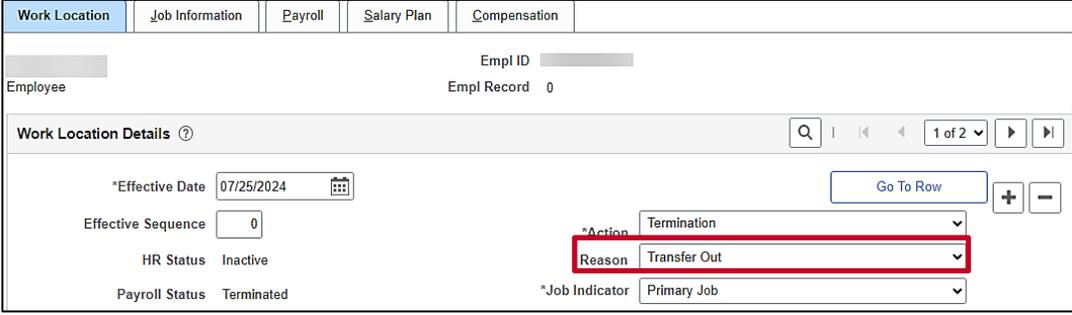
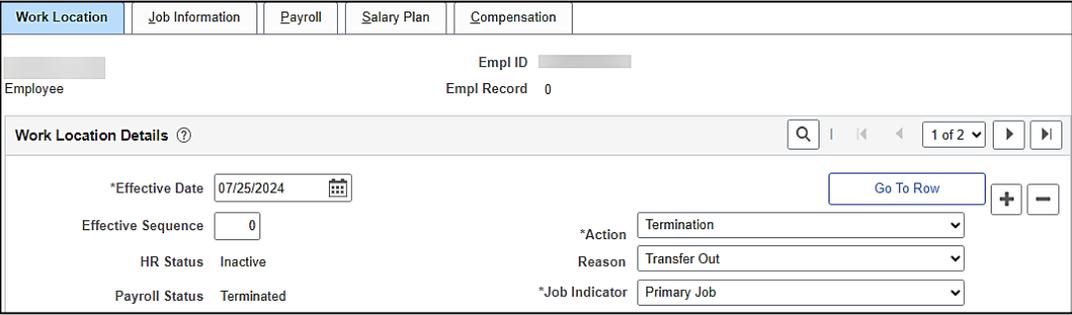
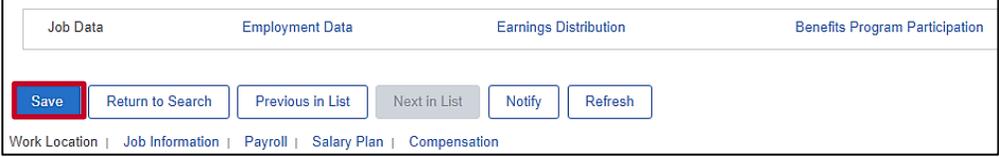
Step	Action
3.	Click the Include History checkbox. <input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History
4.	Click the Search button.

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

The screenshot shows the 'Work Location' tab selected. It displays fields for Employee, Empl ID, and Empl Record. The 'Work Location Details' section includes: *Effective Date (07/12/2024), Effective Sequence (0), HR Status (Active), Payroll Status (Active), *Action (Hire), Reason (New Hire), *Job Indicator (Primary Job), Position Number (CJSTRN01), Position Entry Date (07/12/2024), Regulatory Region (USA), Company (CJS), Business Unit (14000), Department (10320), Location (CENTR), and Establishment ID (DCJS). There are also 'Go To Row', '+', and '-' buttons.

5.	Click the Add a New Row icon (+) to add a new effective dated row.
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Step	Action
	<p>The Work Location tab refreshes with a new effective dated row displayed.</p> 
	<p>When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.</p>
6.	<p>The Effective Date field defaults to the current system date. Update to the correct date.</p> 
	<p>Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll).</p> <p>If an employee's last day is 07/24/2024, the effective date of the termination should be 07/25/2024. 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.</p>
7.	<p>Select the "Termination" option using the Action field dropdown button.</p> 

Step	Action
8.	<p>Select the “Transfer Out” reason using the Reason field dropdown button.</p> 
<p>The Job Data page refreshes.</p> 	
9.	<p>After selecting the Action and Reason, the HR Status and Payroll Status fields automatically update. Validate that the HR status displays as Inactive and the Payroll status displays as Terminated.</p> 
10.	<p>Click the Save button at the bottom of the page.</p> 

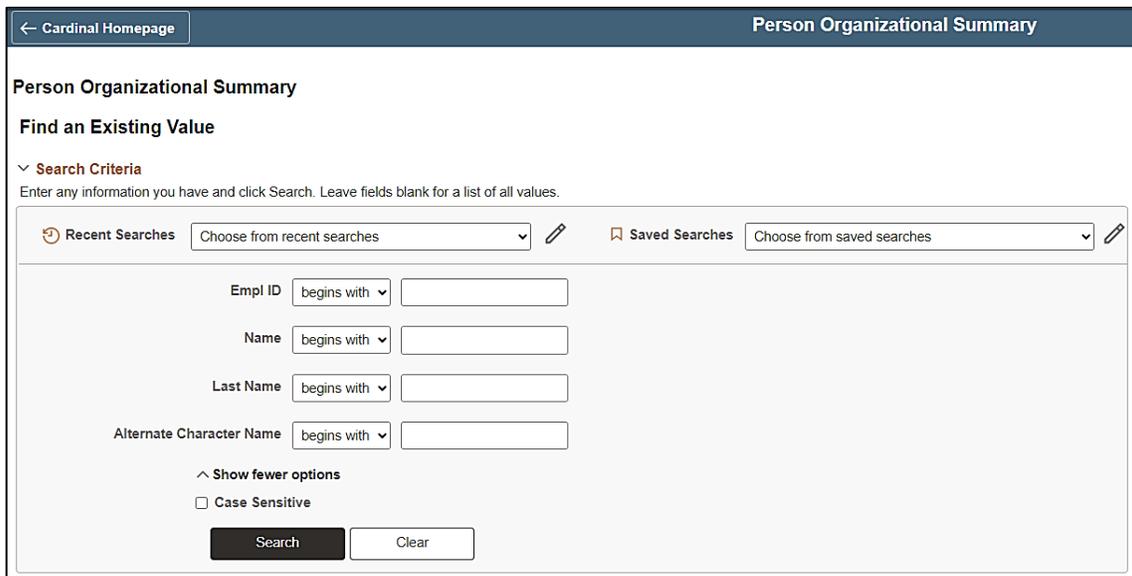
Receiving Agency Tasks

Reviewing Person Organizational Summary

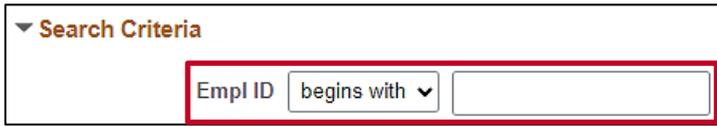
The Receiving Agency must review the **Person Organizational Summary** page to ensure the Sending Agency has processed the termination transaction to transfer the employee out of their agency.

Step	Action
1.	Navigate to the Person Organizational Summary page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Person Organizational Summary

The **Person Organizational Summary Find an Existing Value** page displays.



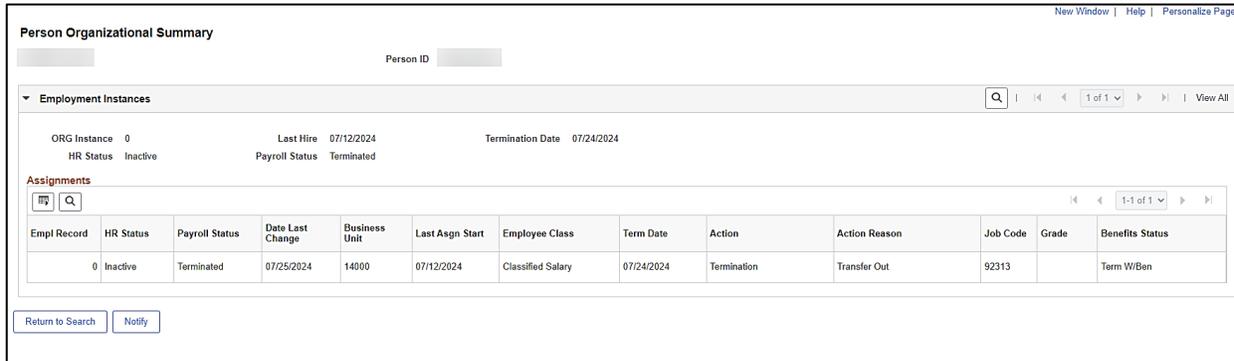
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning .
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2.	Enter the employee’s ID in the Empl ID field. 
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3.	Click the Search button. 
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Step	Action
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The **Person Organizational Summary** page displays the employee’s Empl Records in order starting with Empl Record 0.



Person Organizational Summary New Window | Help | Personalize Page

Person ID [redacted]

Employment Instances 1 of 1 | View All

ORG Instance 0 Last Hire 07/12/2024 Termination Date 07/24/2024
 HR Status Inactive Payroll Status Terminated

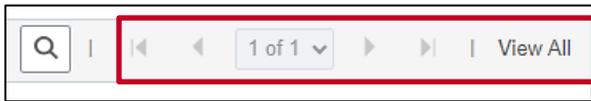
Assignments 1-1 of 1

Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Action	Action Reason	Job Code	Grade	Benefits Status
0	Inactive	Terminated	07/25/2024	14000	07/12/2024	Classified Salary	07/24/2024	Termination	Transfer Out	92313		Term W/Ben

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



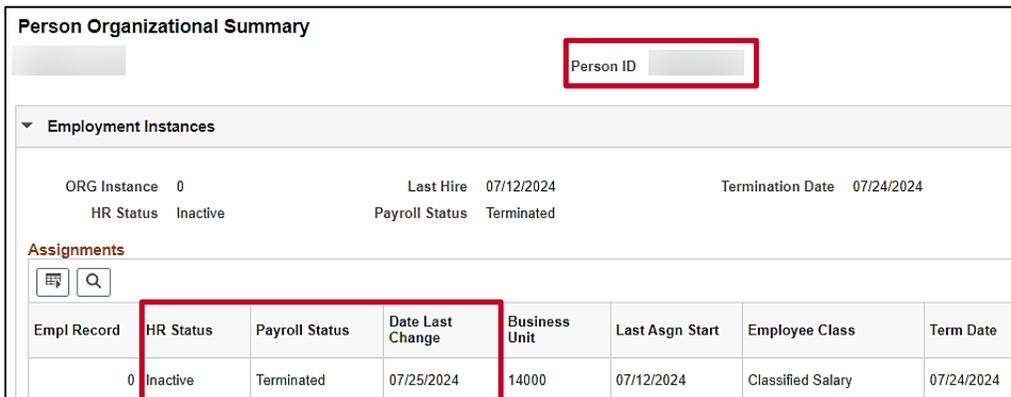
To navigate to the desired Empl Record, if there are more than one, use the navigational arrows or **View All** link in the top right portion of the page.



4.

Review the information and validate it is consistent with the information obtained from the Sending Agency. If the information is not consistent, contact the Sending Agency and/or employee. At a minimum, the following information should be reviewed:

- a. **Person ID** field: Employee ID displayed at the top of the page. Make a note of the Employee ID as it will be needed to complete the transfer action.
- b. **HR Status** field: Should be **Inactive**. If it is “Active”, contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction.
- c. **Payroll Status** field: Should be **Terminated**. If the status is not **Terminated**, contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction.
- d. **Date Last Change** field: This should match the agreed upon Effective Date.



Person Organizational Summary

Person ID [redacted]

Employment Instances

ORG Instance 0 Last Hire 07/12/2024 Termination Date 07/24/2024
 HR Status Inactive Payroll Status Terminated

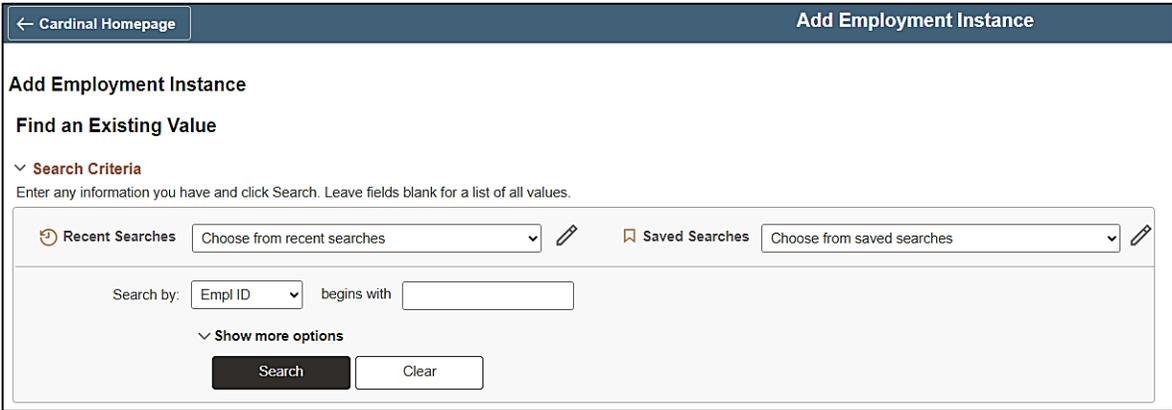
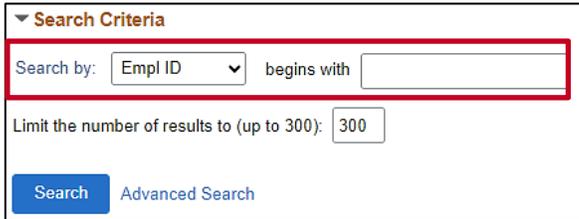
Assignments

Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date
0	Inactive	Terminated	07/25/2024	14000	07/12/2024	Classified Salary	07/24/2024

Step	Action
	<p>The Sending and Receiving Agencies MUST coordinate the effective date of termination and hire/rehire to prevent a break in service. To evaluate the impact of a possible break in service, see the Job Aid titled HR351 Managing Service Dates and Breaks in Service. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
5.	<p>Continue with the hire/rehire action if the record is as expected and the Sending Agency completed the termination action. If the record is not as expected or if the Sending Agency has not completed the termination action, reach out to the Sending Agency to verify the status and effective date before updating the employee's Job Data.</p>

Updating the Employee Job Data

Validate the position information is correct prior to updating the employee’s Job Data. If the position data is incorrect, cancel the action and make corrections to the position before assigning the employee to the position.

Step	Action
1.	<p>Navigate to the Add Employment Instance page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationship > New Employment Instance</p> <p>The Add Employment Instance Find an Existing Value page displays.</p> <div data-bbox="232 709 1404 1119" style="border: 1px solid black; padding: 5px;">  </div>
<div data-bbox="170 1165 235 1228" style="border: 1px solid blue; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> i </div>	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
2.	<p>Enter the employee’s Employee ID into the Search by field.</p> <div data-bbox="289 1339 868 1558" style="border: 1px solid black; padding: 5px;">  </div>
3.	<p>Click the Search button.</p> <div data-bbox="292 1648 922 1753" style="border: 1px solid black; padding: 5px;">  </div>

Step	Action
	<p>The following message displays in a pop-up window.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <p style="text-align: center;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </p> </div>
4.	<p>The employee may require a new employment instance for an Inter-Agency transfer. If the employee has never worked for this agency click the No button to create a new employment instance.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <p style="text-align: center;"> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> </p> </div>
	<p>For guidance on how to answer this question, review the following scenarios below:</p> <p>Scenario 1: Click the No button if the employee is being transferred into a different agency or transferred into a new position at the same agency but into a different employee type (i.e., wage to salaried). The New Employment Instance page displays and clicking the Add Relationship button creates a new employee record that the employee can be hired into. Refer to the Job Aid titled HR351 Completing a New Hire. Instead of using Action/Reason of Hire/New Hire, use the Action of Hire and applicable Transfer In Reason code. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <p style="text-align: center;"> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> </p> </div> <p>Scenario 2: Click the Yes button if the employee is being rehired into the same agency and back into the same employee type (i.e., wage to wage). This hires the employee back into the same employee record they had previously.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <p>Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <p style="text-align: center;"> <input style="border: 2px solid red;" type="button" value="Yes"/> <input type="button" value="No"/> </p> </div>

Step	Action
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The **New Employment Instance** page displays when the user clicks the **No** button.

< Person Org Summary
Add Employment Instance

New Employment Instance

Empl ID

Empl Record 1

Add Relationship

5. Click the **Add Relationship** button.

New Employment Instance

Empl ID

Empl Record 1

Add Relationship



The Employee Record increments to the next sequential number.

The **Add Employment Instance** page refreshes and the **Work Location** tab is displayed by default.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee Empl ID

Empl Record 1

Work Location Details 1 of 1

*Effective Date Go To Row + -

Effective Sequence *Action

HR Status Reason

Payroll Status *Job Indicator

Calculate Status and Dates

Position Number Current

Override Position Data

Position Entry Date

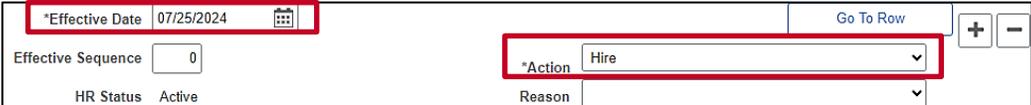
Position Management Record

*Regulatory Region United States

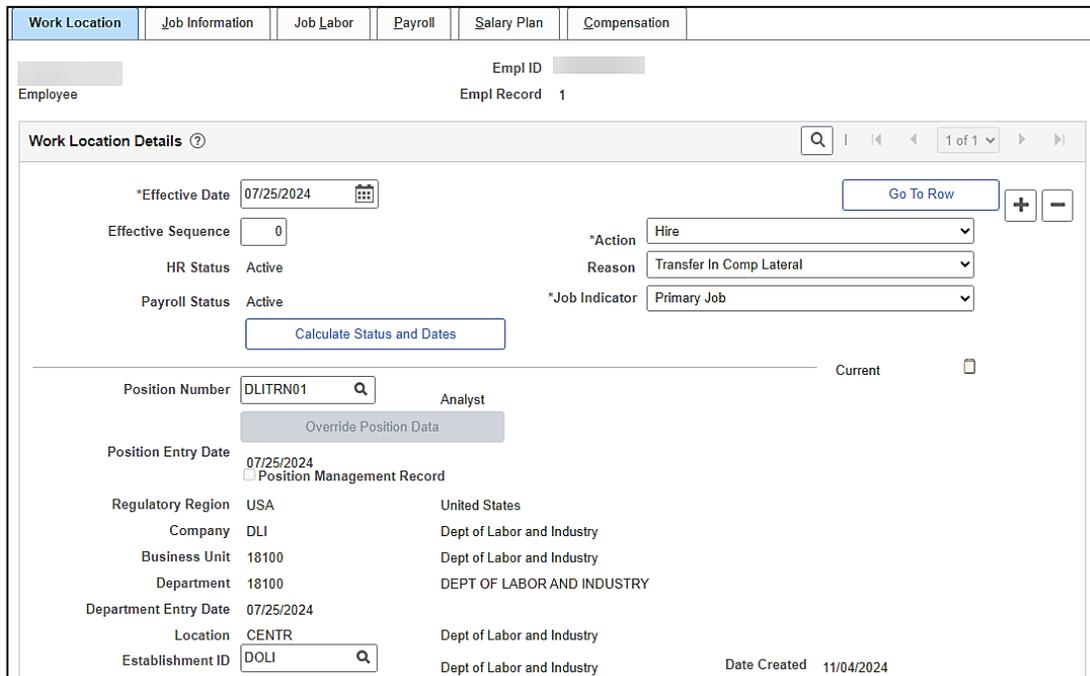
*Company

*Business Unit Department of Accounts



Step	Action
6.	<p>The Effective Date field defaults to the current system date. Update this date to the applicable date of transfer. The Action field defaults to Hire; no other options are available.</p> 
	<p>Classified/VPA employees cannot have a break in service between the Termination and Hire/Rehire actions. Refer to DHRM Policy 2.10, Hiring, for additional guidance.</p>
7.	<p>Click the Reason field drop-down button and select from one of the Transfer In reasons.</p> 
	<p>For further information on valid Action and Reason code combinations and a PMIS crosswalk, see the Job Aid titled HR351 Action Reason Codes. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
8.	<p>Enter the Position Number in the Position Number field and click the Tab key.</p> 

The **Work Location** tab refreshes.



The screenshot shows the 'Work Location' tab selected in a system interface. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below these, the 'Employee' section displays 'Empl ID' and 'Empl Record 1'. The 'Work Location Details' section includes fields for:

- *Effective Date: 07/25/2024
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire
- Reason: Transfer In Comp Lateral
- *Job Indicator: Primary Job

 A 'Calculate Status and Dates' button is present. Below this, the 'Position Number' field contains 'DLITRN01' with a search icon. The position title is 'Analyst'. The 'Position Entry Date' is 07/25/2024, with a checkbox for 'Position Management Record'. The 'Regulatory Region' is USA (United States), 'Company' is DLI (Dept of Labor and Industry), 'Business Unit' is 18100 (Dept of Labor and Industry), and 'Department' is 18100 (DEPT OF LABOR AND INDUSTRY). The 'Department Entry Date' is 07/25/2024, 'Location' is CENTR (Dept of Labor and Industry), and 'Establishment ID' is DOLI (Dept of Labor and Industry). The 'Date Created' is 11/04/2024.

Step	Action
9.	The remaining information populates based on the Position Number entered/selected. Review the information.
	<p>Note: If the position data is not correct (this includes verifying whether the position is eligible for telework), cancel the action, and make corrections to the position before assigning the employee to the position.</p> <p>For more information on reviewing position data, see the Job Aids titled HR351_Managing a Position and HR351_Managing an Employee's Telework Data. These Job Aids can be found on the Cardinal website in Job Aids under Learning.</p>
10.	<p>If the Position Data is correct, click the Job Information tab.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> Work Location Job Information Job Labor Payroll Salary Plan Compensation </div> <div style="display: flex; justify-content: space-between;"> Employee Empl ID </div> <div style="display: flex; justify-content: space-between;"> Employee Empl Record 1 </div> </div>

The **Job Information** tab displays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee
Empl ID

Employee
Empl Record 1

Job Information Details 1 of 1

Effective Date 07/25/2024

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason Transfer In Comp Lateral

Job Indicator Primary Job

Go To Row

Current

Job Code 92313

Entry Date 07/25/2024

Supervisor Level E

Reports To DLI00069 [View Current Incumbents](#)

Regular/Temporary Restricted

Empl Class

Regular Shift Not Applicable

Classified Ind Classified

Analyst

SOC Code

Employee Supervisor Name DLI0006900862330500 JOHN DOE

Public Outreach Marketing Spec 00862330500 JOHN DOE

Full/Part Full-Time

*Officer Code

Shift Rate

Shift Factor

Standard Hours

Standard Hours

FTE 0.000000

Work Period W Weekly

As of Date 07/25/2024

Combined Standard Hours 40.00 FTE 1.000000

Step	Action																		
11.	Most information on the Job Information tab is related to the position. Review the information; if the information is not correct, cancel the action and make corrections to the position before assigning the employee to the position.																		
12.	<p>Click the Empl Class dropdown button and select the applicable Classification. The following classifications are available for selection:</p> <div data-bbox="292 546 609 1243" style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> Adjunct Admin/Prof Agncy Hd Classified Emerg Hrly FedWrkStdy Grad Asst LODA Em LTD LegiAssist Non Class ORP CNV Othr Offcl Ret EE Ret Judge SPORS StWrkStdy Student Sub Judge TLC EE TchResrch Uemply VALORS Wage Wage NE </div>																		
	<p>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 further information on selecting the appropriate employee classification, see the Job Aid titled HR351 Employee Class Overview. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>																		
13.	<p>Click the Payroll tab.</p> <div data-bbox="292 1528 1230 1690" style="border: 1px solid black; padding: 5px;"> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="padding: 2px;">Work Location</td> <td style="padding: 2px; background-color: #e0e0e0;">Job Information</td> <td style="padding: 2px;">Job Labor</td> <td style="padding: 2px; border: 2px solid red;">Payroll</td> <td style="padding: 2px;">Salary Plan</td> <td style="padding: 2px;">Compensation</td> </tr> <tr> <td colspan="3" style="padding: 5px;">Employee</td> <td style="padding: 5px;">Empl ID</td> <td colspan="2" style="padding: 5px;">[Redacted]</td> </tr> <tr> <td colspan="3" style="padding: 5px;"></td> <td style="padding: 5px;">Empl Record</td> <td colspan="2" style="padding: 5px;">1</td> </tr> </table> </div>	Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation	Employee			Empl ID	[Redacted]					Empl Record	1	
Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation														
Employee			Empl ID	[Redacted]															
			Empl Record	1															

Step	Action
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The **Payroll** tab displays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee
Empl ID [redacted]

Empl Record 1

Payroll Information ?
Q | << < 1 of 1 > >>

Effective Date 07/25/2024 Go To Row

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason Transfer In Comp Lateral

Job Indicator Primary Job

Current

*Payroll System Payroll for North America

Absence System Other

Payroll for North America ?

Pay Group

Employee Type

Tax Location Code

GL Pay Type

Combination Code

Holiday Schedule

FICA Status Subject

[Edit ChartFields](#)

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

OK
Cancel
Apply

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

14. The **Absence System** field defaults to “Other”. Keep the default of “Other” if the employee is Wage. If the employee is salaried and their Agency uses Cardinal Absence Management, click the dropdown button and select “Absence Management”.

*Payroll System Payroll for North America

Absence System Other

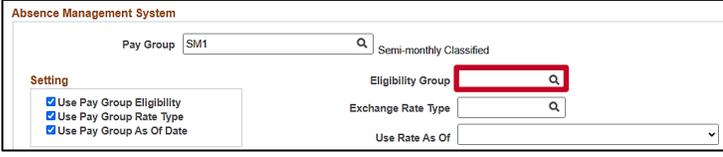
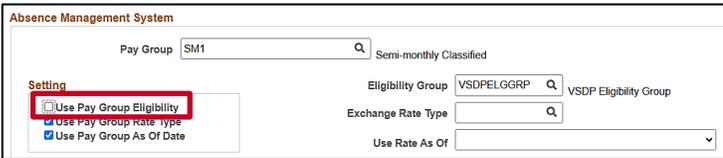
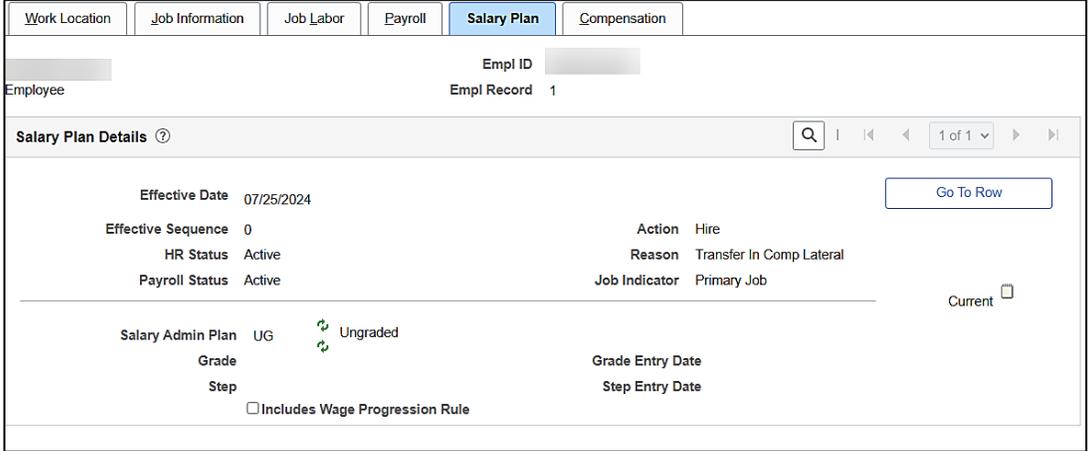
The **Absence Management** section is visible only if “Absence Management” is selected in the **Absence System** field, otherwise this section is hidden.

15. Select the applicable Pay Group in the **Pay Group** field within the **Payroll for North America** section.

Payroll for North America ?

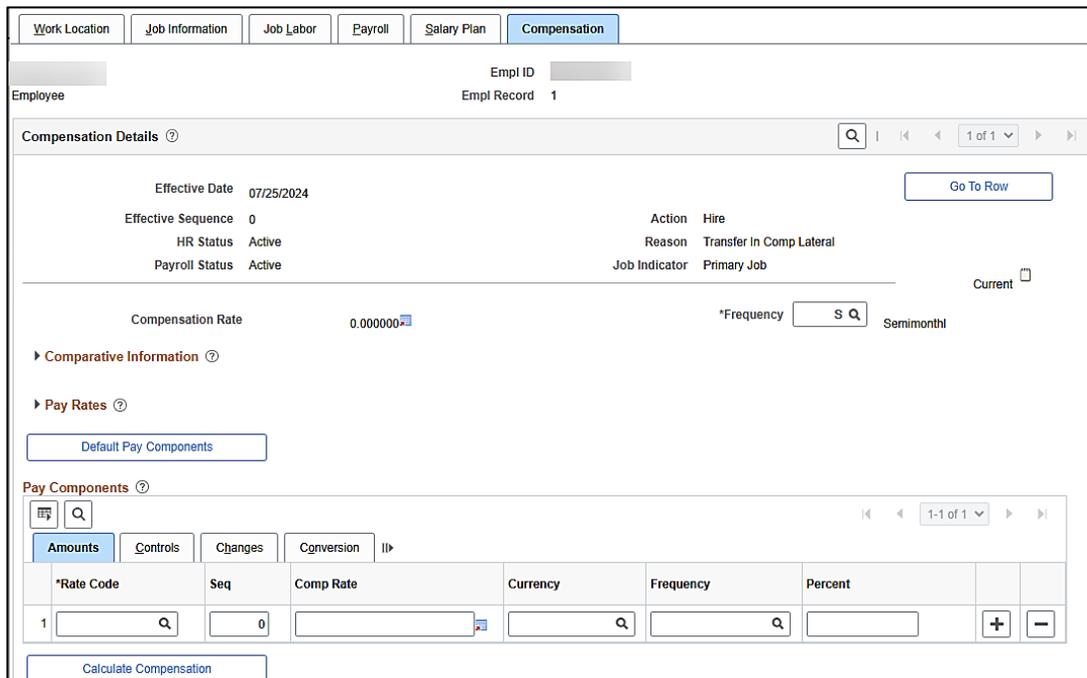
Pay Group

Step	Action
	<p>The options available within the Pay Group field are driven by the type of Absence System selected. It is important to complete this page in order from top to bottom.</p> <p>FICA Status defaults to “Subject” for regular Social Security and Medicare tax withholdings. Update this value to “Exempt” if the employee is exempt from both Social Security and Medicare tax withholdings or “Medicare only” if the employee is only subject to Medicare tax withholdings.</p>
<p>The Payroll tab refreshes.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Payroll for North America ?</p> <p>Pay Group <input type="text" value="SM1"/> Semimonthly Class (SATFRI07)</p> <p>Employee Type <input type="text" value="S"/> Salaried Holiday Schedule <input type="text" value="HOLSAL"/> Sal.HolSch</p> <p>Tax Location Code <input type="text"/></p> <p>GL Pay Type <input type="text"/></p> <p>Combination Code <input type="text"/> FICA Status <input type="text" value="Subject"/> Edit ChartFields</p> <hr/> <p>Absence Management System</p> <p>Pay Group <input type="text" value="SM1"/> Semi-monthly Classified</p> <p>Setting</p> <p><input checked="" type="checkbox"/> Use Pay Group Eligibility</p> <p><input checked="" type="checkbox"/> Use Pay Group Rate Type</p> <p><input checked="" type="checkbox"/> Use Pay Group As Of Date</p> <p>Eligibility Group <input type="text"/></p> <p>Exchange Rate Type <input type="text"/></p> <p>Use Rate As Of <input type="text"/></p> </div>	
	<p>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.</p>
16.	<p>Enter the applicable Tax Location Code (previously known as the FIPS code) in the Tax Location Code field.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Pay Group <input type="text" value="SM1"/> Semimonthly Class (SATFRI07)</p> <p>Employee Type <input type="text" value="S"/> Salaried</p> <p>Tax Location Code <input style="border: 2px solid red;" type="text"/></p> </div>
	<p>Updates made to the Tax Location Code will update the Tax Data pages in the Payroll module.</p>
17.	<p>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.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Absence Management System</p> <p>Pay Group <input style="border: 2px solid red;" type="text" value="SM1"/> Semi-monthly Classified</p> <p>Setting</p> <p><input checked="" type="checkbox"/> Use Pay Group Eligibility</p> <p><input checked="" type="checkbox"/> Use Pay Group Rate Type</p> <p><input checked="" type="checkbox"/> Use Pay Group As Of Date</p> <p>Eligibility Group <input type="text"/></p> <p>Exchange Rate Type <input type="text"/></p> <p>Use Rate As Of <input type="text"/></p> </div>

Step	Action
18.	<p>Select the appropriate eligibility group in the Eligibility Group field.</p> 
	<p>For further information on updating the Eligibility Group field, see the Job Aid titled TA374_Absence Management Leave Types and Eligibility. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
19.	<p>De-select the Use Pay Group Eligibility checkbox.</p> 
20.	<p>Once the payroll information is entered, click the Salary Plan link at the top of the page.</p> 
<p>The Salary Plan tab displays.</p> 	
21.	<p>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 fields may change for the employee if this action is a promotion or demotion.</p>

Step	Action
	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 .
22.	<p>If the salary plan information is correct, click the Compensation tab.</p> 

The **Compensation** tab displays.



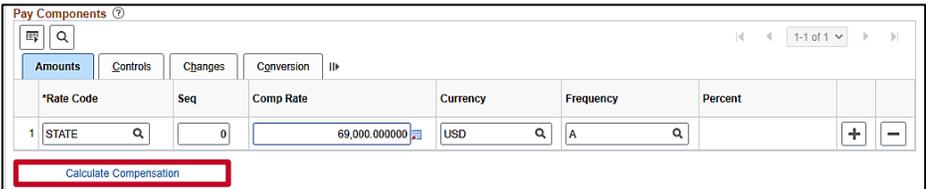
The screenshot shows the Compensation tab selected in the top navigation bar. Below the navigation bar, there are fields for Employee ID and Empl Record (1). The main content area is titled "Compensation Details" and includes a search bar and navigation controls. Key information displayed includes:

- Effective Date: 07/25/2024
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Action: Hire
- Reason: Transfer In Comp Lateral
- Job Indicator: Primary Job
- Compensation Rate: 0.000000
- *Frequency: S (Semimonthly)

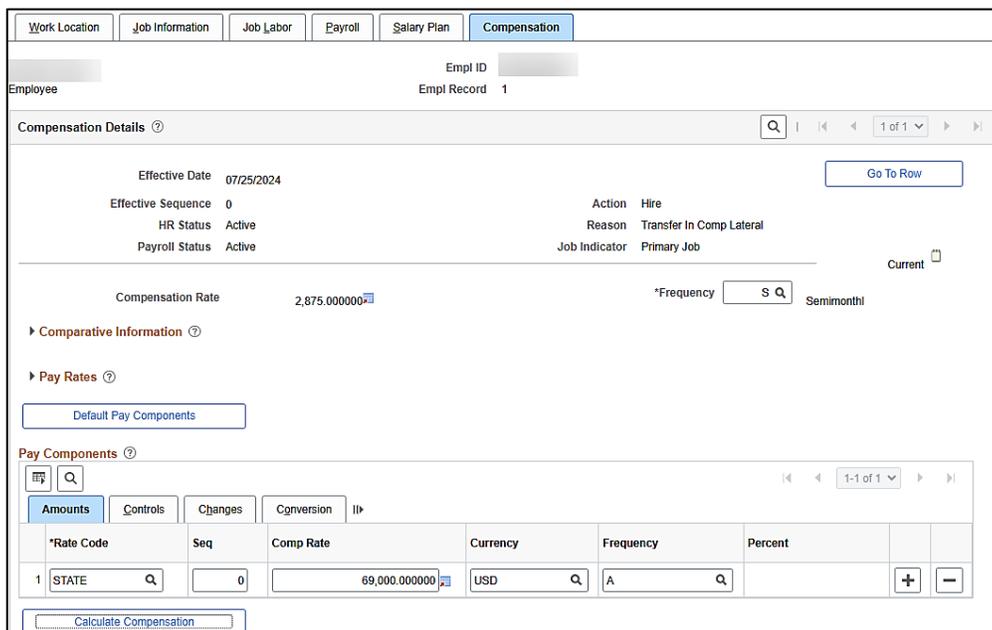
Below this information are expandable sections for "Comparative Information", "Pay Rates", and "Default Pay Components". At the bottom, there is a "Pay Components" table with columns for Rate Code, Seq, Comp Rate, Currency, Frequency, and Percent. A "Calculate Compensation" button is located at the bottom left of the table.

23.	<p>Select the applicable pay frequency in the Frequency field.</p> 
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24.	<p>Click the Default Pay Components button.</p> 
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Step	Action
25.	Select the applicable rate code in the Rate Code field. 
26.	Enter the employee's annual salary or hourly rate in the Comp Rate field. 
	The Currency and Frequency fields default based on the Rate Code selected. Frequency for Salaried will be A and Frequency for Hourly will be H .
27.	Click the Calculate Compensation button. 

The **Compensation** page refreshes.



The screenshot shows the Compensation page for an employee. At the top, there are tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The Compensation tab is active. Below the tabs, the employee's name and ID are shown. The main section is titled "Compensation Details" and includes fields for Effective Date (07/25/2024), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Hire), Reason (Transfer In Comp Lateral), and Job Indicator (Primary Job). The Compensation Rate is 2,875.000000 and the Frequency is S (Semimonthly). There are sections for Comparative Information and Pay Rates. At the bottom, the Pay Components table is visible, showing the same data as in the previous steps: Rate Code STATE, Seq 0, Comp Rate 69,000.000000, Currency USD, and Frequency A. A Calculate Compensation button is highlighted at the bottom of the table.

Step	Action
28.	<p>Click the Employment Data link at the bottom of the page.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Job Data Employment Data Earnings Distribution Benefits Program Participation </div>

The **Employment Information** page displays.

Employment Information

Employee
Empl ID

Empl Record 1

Organizational Instance ?

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

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date 11/05/2024	First Assignment Start 11/05/2024	
Assignment End Date		
Home/Host Classification Home	Years	Months
Company Seniority Date	<input type="checkbox"/> Override	Days
Benefits Service Date	<input type="checkbox"/> Override	Time Reporter Data
Seniority Pay Calc Date	<input type="checkbox"/> Override	0
VSDP Sick/PER Leave Effct Date 07/12/2030	0	0
Probation Date <input type="text"/>	0	0
Business Title Analyst	Last Verification Date <input type="text"/>	

*Employee Eligible for Telework? Employee Eligible for Telework v Tenure Status/Contract Type v

<div style="border: 1px solid #ccc; border-radius: 50%; width: 30px; height: 30px; margin: 0 auto; display: flex; align-items: center; justify-content: center;"> i </div>	<p>Before recording the employee’s telework status, the Agency HR administrator should verify and/or update the following if the employee will be teleworking:</p> <ul style="list-style-type: none"> The Available for Telework field = “Yes” on the employee’s position record <p>For further information on selecting the appropriate telework option, see the Job Aid titled HR351_Managing Employee Teleworker Data. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
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29.	<p>Select the appropriate value for the *Employee Eligible for Telework field.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <div style="border: 2px solid red; padding: 2px; margin-bottom: 5px;"> *Employee Eligible for Telework? Employee Eligible for Telework v </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Alternate Leave Plan <input type="text"/> <input type="checkbox"/> Alternate Work Schedule </div> <div style="display: flex; justify-content: space-between;"> VSDP Enroll Date 07/12/2025 <input type="text"/> </div> </div>
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Step	Action												
30.	<p>If the Agency does not use Cardinal Absence Management, the Alternate Leave Plan field must be completed based on the employee's leave program (i.e., VSDP Elig Group) in order for the employee to have a complete Total Compensation statement in Cardinal ESS.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>*Employee Eligible for Telework? Employee Eligible for Telework ▼</p> <p> <input type="text" value="Alternate Leave Plan"/> <input type="checkbox"/> Alternate Work Schedule </p> <p>VSDP Enroll Date <input type="text" value="07/12/2025"/> </p> </div>												
31.	<p>Enter the enrollment date in the VSDP Enroll Date fields. This field is provided to VNAV and is used by the VSDP vendor to determine the program enrollment date.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>*Employee Eligible for Telework? Employee Eligible for Telework ▼</p> <p> <input type="text" value="Alternate Leave Plan"/> <input type="checkbox"/> Alternate Work Schedule </p> <p>VSDP Enroll Date <input type="text" value="07/12/2025"/> </p> </div>												
32.	<p>Enter the original hire date in the Continuous State Service Date field. This field is used to determine eligibility for legislative pay increases for all salaried employees, as well as severance, benefits at layoff for VPA covered employees (if applicable).</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Person Employment Dates <small>?</small></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;"><input type="text" value="Continuous State Service Date"/> <input type="text" value="07/12/2025"/> </td> <td style="width: 20%;">Previous State Service Months</td> <td style="width: 40%; text-align: right;"><input type="text" value="0"/></td> </tr> <tr> <td><input type="text" value="Annual Leave Eligibility Date"/> <input type="text" value="07/12/2025"/> </td> <td>Veteran's Service Credit Months</td> <td style="text-align: right;"><input type="text" value="60"/></td> </tr> <tr> <td colspan="2"></td> <td style="text-align: right;">Total Service Credit Months</td> </tr> <tr> <td colspan="2"></td> <td style="text-align: right;">60</td> </tr> </table> </div>	<input type="text" value="Continuous State Service Date"/> <input type="text" value="07/12/2025"/>	Previous State Service Months	<input type="text" value="0"/>	<input type="text" value="Annual Leave Eligibility Date"/> <input type="text" value="07/12/2025"/>	Veteran's Service Credit Months	<input type="text" value="60"/>			Total Service Credit Months			60
<input type="text" value="Continuous State Service Date"/> <input type="text" value="07/12/2025"/>	Previous State Service Months	<input type="text" value="0"/>											
<input type="text" value="Annual Leave Eligibility Date"/> <input type="text" value="07/12/2025"/>	Veteran's Service Credit Months	<input type="text" value="60"/>											
		Total Service Credit Months											
		60											
33.	<p>Enter the original hire date in the Annual Leave Eligibility Date field. This field must be updated for all VPA covered employees and salaried employees for agencies that use Cardinal's Absence Management and auto populates the Company Seniority Date field.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Person Employment Dates <small>?</small></p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 40%;">Continuous State Service Date</td> <td style="width: 20%;"><input type="text" value="07/12/2025"/> </td> <td style="width: 40%;">Previous State Service Months</td> <td style="text-align: right;"><input type="text" value="0"/></td> </tr> <tr> <td><input type="text" value="Annual Leave Eligibility Date"/> <input type="text" value="07/12/2025"/> </td> <td></td> <td>Veteran's Service Credit Months</td> <td style="text-align: right;"><input type="text" value="60"/></td> </tr> <tr> <td colspan="2"></td> <td>Total Service Credit Months</td> <td style="text-align: right;">60</td> </tr> </table> </div>	Continuous State Service Date	<input type="text" value="07/12/2025"/>	Previous State Service Months	<input type="text" value="0"/>	<input type="text" value="Annual Leave Eligibility Date"/> <input type="text" value="07/12/2025"/>		Veteran's Service Credit Months	<input type="text" value="60"/>			Total Service Credit Months	60
Continuous State Service Date	<input type="text" value="07/12/2025"/>	Previous State Service Months	<input type="text" value="0"/>										
<input type="text" value="Annual Leave Eligibility Date"/> <input type="text" value="07/12/2025"/>		Veteran's Service Credit Months	<input type="text" value="60"/>										
		Total Service Credit Months	60										
	<p>If a correction is needed for the Annual Leave Eligibility Date, use the Action Reason combination of DTA / LED and then enter the correct date. For further information on Action Reasons, 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.</p>												

Step	Action												
34.	<p>Enter the service months in the Previous State Service Months field. This field is used when there is a break in service (Rehires only). For further information on breaks in service, refer to the Job Aid titled HR351 Managing Service Dates and Breaks in Service. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Person Employment Dates ?</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Continuous State Service Date</td> <td style="width: 20%;">07/12/2025 </td> <td style="width: 30%; border: 2px solid red;">Previous State Service Months</td> <td style="width: 20%; border: 2px solid red;">0</td> </tr> <tr> <td>Annual Leave Eligibility Date</td> <td>07/12/2025 </td> <td>Veteran's Service Credit Months</td> <td>60</td> </tr> <tr> <td colspan="2"></td> <td>Total Service Credit Months</td> <td>60</td> </tr> </table> </div>	Continuous State Service Date	07/12/2025	Previous State Service Months	0	Annual Leave Eligibility Date	07/12/2025	Veteran's Service Credit Months	60			Total Service Credit Months	60
Continuous State Service Date	07/12/2025	Previous State Service Months	0										
Annual Leave Eligibility Date	07/12/2025	Veteran's Service Credit Months	60										
		Total Service Credit Months	60										
35.	<p>Enter the months of veteran's service in the Veterans Service Credit Months field if applicable.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Person Employment Dates ?</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Continuous State Service Date</td> <td style="width: 20%;">07/12/2025 </td> <td style="width: 30%;">Previous State Service Months</td> <td style="width: 20%;">0</td> </tr> <tr> <td>Annual Leave Eligibility Date</td> <td>07/12/2025 </td> <td style="border: 2px solid red;">Veteran's Service Credit Months</td> <td style="border: 2px solid red;">60</td> </tr> <tr> <td colspan="2"></td> <td>Total Service Credit Months</td> <td>60</td> </tr> </table> </div>	Continuous State Service Date	07/12/2025	Previous State Service Months	0	Annual Leave Eligibility Date	07/12/2025	Veteran's Service Credit Months	60			Total Service Credit Months	60
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Annual Leave Eligibility Date	07/12/2025	Veteran's Service Credit Months	60										
		Total Service Credit Months	60										
	<p>The annual leave accrual is determined by using state service and veteran's service in the military, National Guard, or Reserves. When entering Veterans Service Credit Months, agencies must also populate the Leave Eligibility Service Date field. Failing to do so will result in a delivered PeopleSoft Error code upon save.</p> <p>The Total Service Credit Months field is a read only field. It is auto populated as the sum of the veteran's service credit months and the previous state service months. It is used to determine the annual leave eligibility date when there is a break in service or veteran's service applies.</p> <p>For a detailed description of the date fields on the Employment Information page, refer to the Job Aid titled HR351 Managing Service Dates and Breaks in Service. This Job Aid can be found on the Cardinal website in the Job Aids under Learning.</p>												
36.	<p>Click the Benefits Program Participation link at the bottom of the page.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 20%; text-align: center; border-bottom: 1px solid black;">Job Data</td> <td style="width: 20%; text-align: center; border-bottom: 1px solid black;">Employment Data</td> <td style="width: 20%; text-align: center; border-bottom: 1px solid black;">Earnings Distribution</td> <td style="width: 40%; text-align: center; border-bottom: 1px solid black; border: 2px solid red;">Benefits Program Participation</td> </tr> </table> </div>	Job Data	Employment Data	Earnings Distribution	Benefits Program Participation								
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation										



Step	Action
37.	<p>The Benefit Program Participation page displays.</p> <div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p>Benefit Program Participation</p> <hr/> <p>Employee Empl ID [redacted] Empl Record 1</p> <p>Benefit Status [Search] [Navigation] 1 of 1 [Dropdown] [Navigation]</p> <p>Benefit Record Number 0 Go To Row</p> <p>Effective Date 04/25/2025</p> <p>Effective Sequence 0 Action Hire</p> <p>HR Status Active Reason Transfer In Comp Lateral</p> <p>Payroll Status Active Job Indicator Primary Job</p> <hr/> <p>*Benefits System Current [Calendar] Benefits Employee Status Active</p> <p>Annual Benefits Base Rate [Input] USD ACA Eligibility Details</p> <p>Benefits Administration Eligibility [Help]</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>BAS Group ID [Input] [Search]</p> <p>Elig Fld 1 [Input] [Search] Elig Fld 2 [Input] [Search] Elig Fld 3 [Input] [Search]</p> <p>Elig Fld 4 [Input] [Search] Elig Fld 5 [Input] [Search] Elig Fld 6 [Input] [Search]</p> <p>Elig Fld 7 [Input] [Search] Elig Fld 8 [Input] [Search] Elig Fld 9 [Input] [Search]</p> </div> </div> <div style="border: 1px solid black; padding: 10px; margin-bottom: 10px;"> <p>Benefit Program Participation Details [Search] [Navigation] 1 of 1 [Dropdown] [Navigation] View All</p> <p>Effective Date 01/01/2025 Currency Code USD</p> <p>Benefit Program SAL Salaried Employee Benefit Pgm</p> </div> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Job Data Employment Data Earnings Distribution Benefits Program Participation</p> </div> <p>OK Cancel Apply</p>

Step	Action												
38.	<p>Complete the Elig Fld 2, Elig Fld 3, Elig Fld 8, and Elig Fld 9 fields based on the following:</p> <ul style="list-style-type: none"> • Elig Fld 2 - 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) • Elig Fld 3 - select “Y” when time is entered by the employee or select “N” when time is entered by a Timekeeper or time is interfaced. Elig Fld 3 should only be completed for PY/TA agencies. Otherwise, Elig Fld 3 should be left blank. Selecting “Y” gives the employee modify access to the timesheet. Selecting “N” or leaving the field blank gives the employee view only access to the timesheet • Elig Fld 8 - select the applicable pay frequency (i.e., salaried is “12-24” and hourly is “12-26”) • Elig Fld 9 - select the applicable value. 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) <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Benefits Administration Eligibility ⓘ</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">BAS Group ID <input type="text"/></td> <td style="width: 33%;">Elig Fld 2 <input type="text"/></td> <td style="width: 33%;">Elig Fld 3 <input type="text"/></td> </tr> <tr> <td>Elig Fld 1 <input type="text"/></td> <td>Elig Fld 5 <input type="text"/></td> <td>Elig Fld 6 <input type="text"/></td> </tr> <tr> <td>Elig Fld 4 <input type="text"/></td> <td>Elig Fld 8 <input type="text"/></td> <td>Elig Fld 9 <input type="text"/></td> </tr> <tr> <td>Elig Fld 7 <input type="text"/></td> <td></td> <td></td> </tr> </table> </div>	BAS Group ID <input type="text"/>	Elig Fld 2 <input type="text"/>	Elig Fld 3 <input type="text"/>	Elig Fld 1 <input type="text"/>	Elig Fld 5 <input type="text"/>	Elig Fld 6 <input type="text"/>	Elig Fld 4 <input type="text"/>	Elig Fld 8 <input type="text"/>	Elig Fld 9 <input type="text"/>	Elig Fld 7 <input type="text"/>		
BAS Group ID <input type="text"/>	Elig Fld 2 <input type="text"/>	Elig Fld 3 <input type="text"/>											
Elig Fld 1 <input type="text"/>	Elig Fld 5 <input type="text"/>	Elig Fld 6 <input type="text"/>											
Elig Fld 4 <input type="text"/>	Elig Fld 8 <input type="text"/>	Elig Fld 9 <input type="text"/>											
Elig Fld 7 <input type="text"/>													
	<p>Do not make any updates to the Benefit Program Participation Details section.</p> <p>For further information on Eligibility Configuration Fields, 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.</p>												
39.	<p>Click the OK button at the bottom of the page.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p style="text-align: center;"> Job Data Employment Data Earnings Distribution Benefits Program Participation </p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/> </p> </div>												
<p>The New Employment Instance page returns.</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> < Person Org Summary Add Employment Instance </div> <div style="text-align: center; padding: 10px 0;"> <p>New Employment Instance</p> <p>Empl ID <input type="text"/></p> <p>Empl Record 1</p> <p style="margin-top: 10px;"><input type="button" value="Add Relationship"/></p> </div> </div>													



Step	Action
40.	Continue to the Agency Next Steps After Hire section of this Job Aid.

Agency Next Steps After Entering the Inter-Agency Transfer

Be sure to enter/review the employee's citizenship, the employee's personal data, and add telework agreement if one has been established/approved.

- For further information on entering citizenship information, updating personal data and telework, see the Job Aids titled **HR351_Viewing and Modifying Personal Data** and **HR351_Maintain Employee Teleworker Data**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**

If the Agency requires the Employee Activity Report to be placed in the personnel file, be sure to run the **Employee Activity Report**. This report can be found in the **Cardinal HCM Human Resources Reports Catalog**. The reports catalog can be found on the Cardinal website in **Reports Catalog** under **Resources**.

Communicate with the employee to update/review state and federal withholding forms, direct deposit elections, etc. per established business practices. If the tax withholding paper is not collected and entered prior to the first payroll period, withholdings will default to single and zero. State taxes default to VA.

Receiving Agency Benefits Administrator - Review the transferring employee's information to ensure the transfer is done correctly and with as little disruption to the employee as possible.

Coordinate with Agency Time and Labor (TL) Administrators to ensure that all employees are assigned the applicable Work Schedule (can be assigned by either a TL Administrator or the employee's supervisor), review their TA eligibilities (i.e., overtime, comp leave, etc.) and leave balance for possible adjustments.

- For further information on assigning Work Schedules and entering balance adjustments, see the Job Aids titled **TA_Maintaining Employee Work Schedules** and **TA374_Managing Balance Adjustments**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**