



**Processing a Change in Full/Part/Quasi Status Overview**

When updating an employee from full-time, part-time, or quasi status, the change must be made first to the Position. Before making the change to the Position, review the employee’s Job Record to determine the highest effective dated row. The effective date used on the Position update transaction must be greater than the highest effective date on the employee’s Job Record so that the Position change will flow over to the employee’s Job Record correctly.

After updating the applicable fields on the Position, navigate to the employee’s Job Record to update the applicable fields that affect pay using the same effective date as the Position change and incrementing the **Effective Sequence** field by one. Because the employee’s compensation has to be updated, use an Action in Job Data of “Pay Rate Change” and the applicable Reason for the change.

**Navigation Note:** Please note that you may see 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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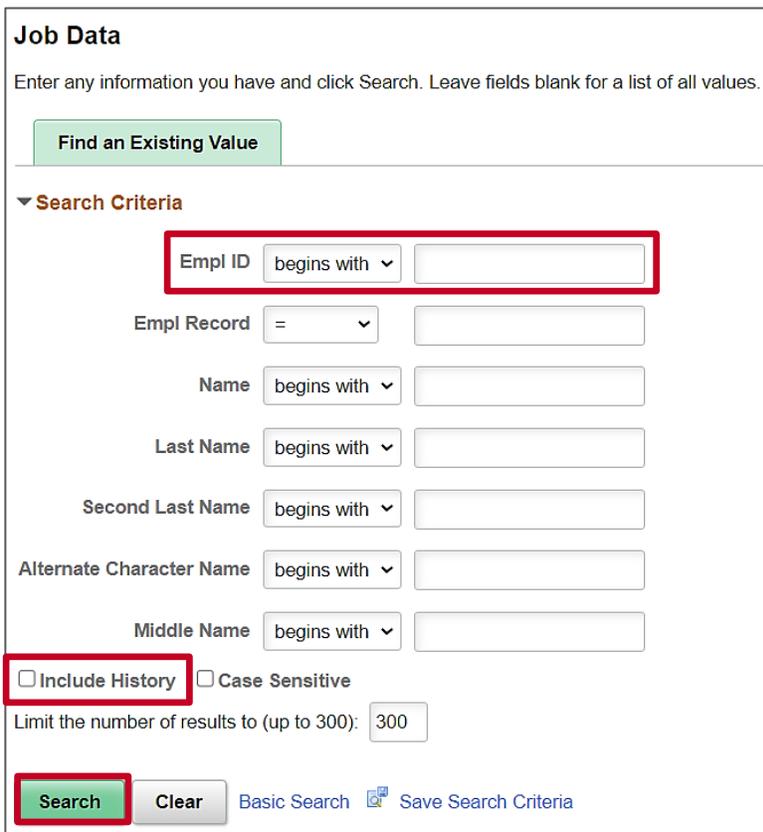
**Updating a Change in Status from Full/Part/Quasi**

Before beginning, navigate to the employee's Job Record to check the effective date of the highest effective dated row. When updating the Position, the effective date used must be after the effective date on the employee's highest effective dated Job Data row.

1. Access the **Job Data** page using the following path:

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

The **Job Data Search** page displays.

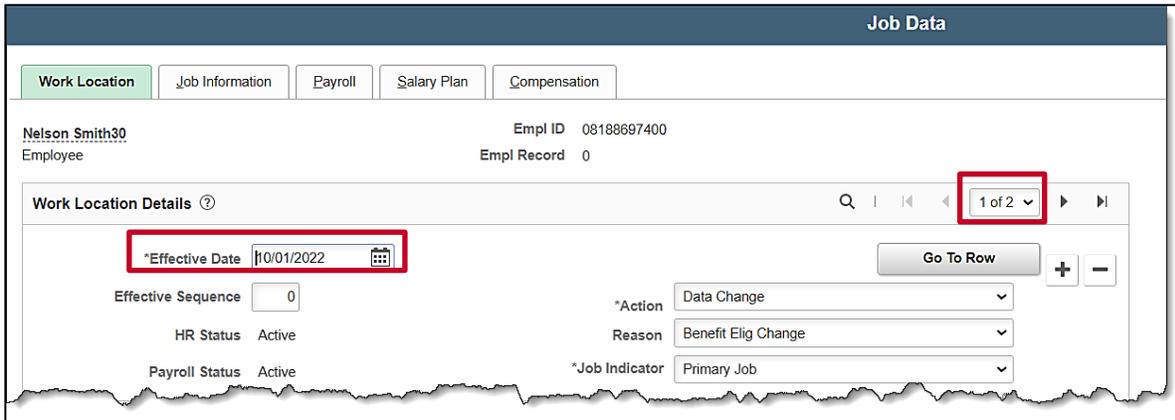


2. Enter the applicable employee's Employee ID in the **Empl ID** field.

**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. For further information on searching for employees, refer to the Job Aid titled NAV205\_Navigation in Cardinal HCM. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

3. Click the **Include History** checkbox option.
4. Click the **Search** button.

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



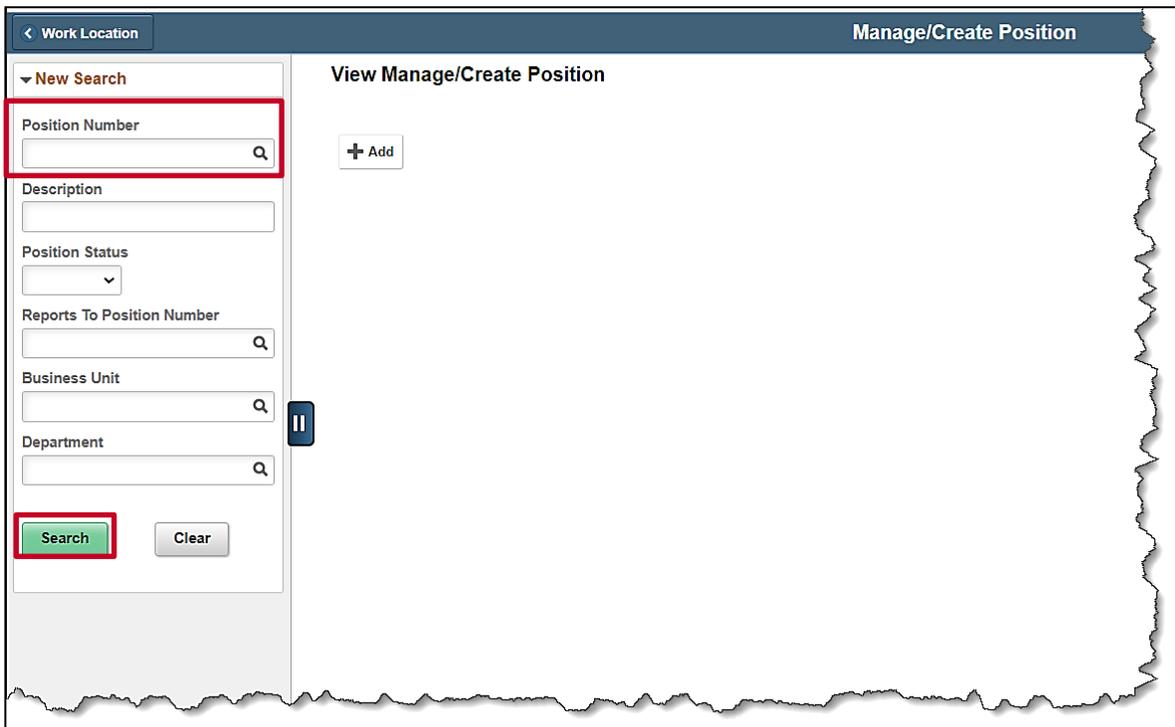
5. Locate the employee's highest effective dated row and make note of that date.

**Note:** When updating the Position, the effective date used must be after the highest effective date found on the employee's Job Record in order for the Position change to flow to the Job Record correctly.

6. Next, access the employee's Position to make the update to their full/part/quasi status using the following path:

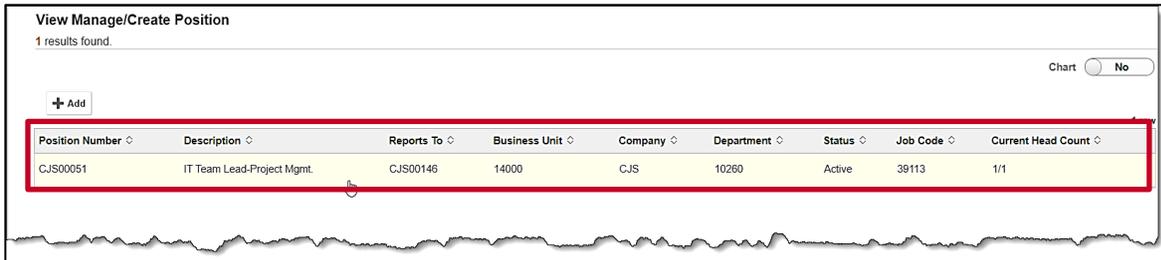
**Navigator > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position**

The **View Manage/Create Position** page displays.



7. Enter the employee's Position Number in the **Position Number** field.
8. Click the **Search** button.

The employee's Position displays in the search results at the bottom of the page.



View Manage/Create Position  
1 results found.

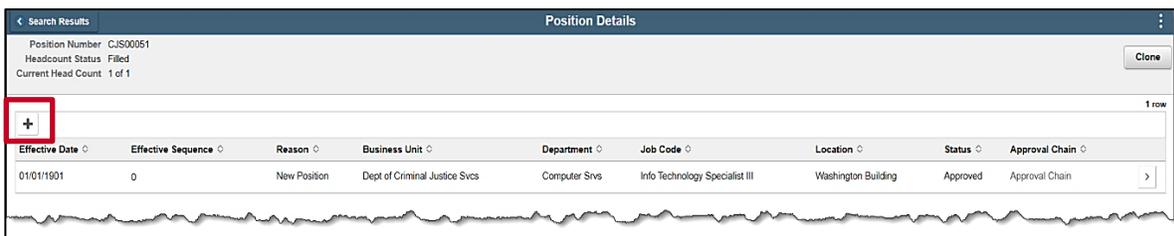
Chart  No

+ Add

Position Number	Description	Reports To	Business Unit	Company	Department	Status	Job Code	Current Head Count
CJS00051	IT Team Lead-Project Mgmt.	CJS00146	14000	CJS	10260	Active	39113	1/1

9. Click anywhere in the Position row to select it.

The **Position Details** page displays.



Search Results Position Details

Position Number: CJS00051  
Headcount Status: Filled  
Current Head Count: 1 of 1 Clone

+ 1 row

Effective Date	Effective Sequence	Reason	Business Unit	Department	Job Code	Location	Status	Approval Chain
01/01/1901	0	New Position	Dept of Criminal Justice Svcs	Computer Svcs	Info Technology Specialist III	Washington Building	Approved	Approval Chain

10. Click the **Add a New Row (+)** button.

The **Request Details** page displays in a pop-up window.



Cancel Request Details Continue

\*Effective Date  

Effective Sequence 0

Reason Code  

11. Select the applicable effective date for the change using the **Effective Date Calendar** icon.  
**Note:** The effective date must be after the date captured in Step 5.
12. Select the applicable reason for the update using the **Reason Code Lookup** icon.
13. Click the **Continue** button.



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The **Step 1 of 4: Position Data** page displays.

Position Number: CJS00051  
Headcount Status: Filled  
Current Head Count: 1 of 1

**1 Position Data** Visited

**2 Specific Information** Not Started

**3 Budget Incumbents** Not Started

**4 Review and Submit** Not Started

**Position Information**

\*Position Status: Approved  
\*Status: Active  
Action Date: 10/31/2022  
Alternate Work Schedule: Yes  
Key Position: No  
Budgeted Position: Yes  
Confidential Position: No

Max Head Count: 1  
Status Date: 08/14/2021  
SOC Code / Extension: 15-1041  
Job Sharing Permitted: No  
Available for Telework: Yes  
\*EEO-4 Job Category: Professionals  
Workers' Comp Code: 8810

**Job Information**

\*Business Unit: 14000 Dept of Criminal Justice Svcs  
\*Job Code: 39113 Info Technology Specialist III  
\*Regular/Temporary: Regular  
\*Regular Shift: Not Applicable

\*Full/Part Time: Full-Time  
Union Code: 39113  
Short Title: Information Technology Specialist III  
Description: Information Technology Specialist III

Next >

14. Within the **Job Information** section, update the **Full/Part Time** field using the dropdown button provided.

15. Click the **Next** button.

The **Step 2 of 4: Specific Information** page displays.

Position Number: ACS00096  
Headcount Status: Filled  
Current Head Count: 1 of 1

**1 Position Data** Visited

**2 Specific Information** Visited

**3 Budget Incumbents** Not Started

**4 Review and Submit** Not Started

**Step 2 of 4: Specific Information**

Effective Date: 11/16/2022  
Reason Code: UPD Position Data Update  
Effective Sequence: 0  
Approval Status: Not Available

**Specific Information**

Mail Drop ID: \_\_\_\_\_ Telephone: \_\_\_\_\_  
Drug Program: No Signature Authority: \_\_\_\_\_  
Privatization: No  
Agency Use 1: \_\_\_\_\_ License 1: \_\_\_\_\_  
Agency Use 2: \_\_\_\_\_ License 2: \_\_\_\_\_  
Agency Use 3: 0000000000 License 3: \_\_\_\_\_

Physical Requirements: Yes  
Fingerprinting Required: Yes  
Certifications: No  
Safety Sensitive Position: No  
Language: No  
Critical/Hard to Hire: No

Comments: \_\_\_\_\_

Previous < Next >

**Related Information**

View Position  
Position History

16. No changes are needed on this page. Click the **Next** button.



## HR351\_Processing a Change in Full/Part/Quasi Status

The **Step 3 of 4: Budget Incumbents** page displays.

Name	Empl ID	Empl Record	Full/Part	Std Hrs/Wk	Effective Date	Action	Action Reason	Override Position Data	Job Data
TROY AIKMAN	00015478700	0	Full-Time	40.00	07/10/2022	Pay Rate Change	FY23 Statewide Increase	N	Job Data

17. No changes are needed on this page. Click the **Next** button.

The **Step 4 of 4: Review and Submit** page displays.

Description	Proposed Value	Current Value
Reason Code	UPD	NEW
Action Date	2022-10-31	2021-06-14
Full/Part Time	Q	F

18. Review the changes made (**Proposed Value** column) and then click the **Submit** button.

**Note:** Use the **Previous** button if the change is not reflected accurately.

The **Position Confirmation** page displays.

Position Number: CJS00051  
Headcount Status: Filled  
Current Head Count: 1 of 1

[Go to Position Details](#) [Go to Manage/Create Position](#)

19. Next, re-access the employee's Job Record to make the update. Access 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**  
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   
 Include History  Case Sensitive  
Limit the number of results to (up to 300):   
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

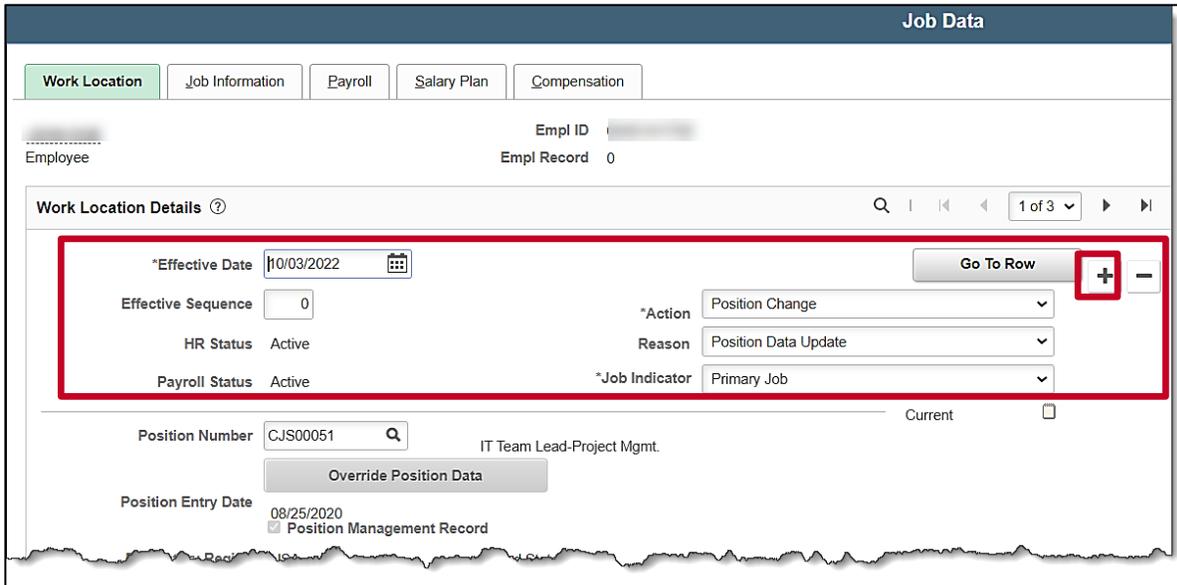
20. Enter the applicable employee's Employee ID in the **Empl ID** field.

**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. For further information on searching for employees, refer to the Job Aid titled **NAV205\_Navigation in Cardinal HCM**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

21. Click the **Include History** checkbox option.

22. Click the **Search** button.

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



**Job Data**

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

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

Work Location Details ②

\*Effective Date: 10/03/2022  Go To Row **+** **-**

Effective Sequence: 0 \*Action: Position Change

HR Status: Active Reason: Position Data Update

Payroll Status: Active \*Job Indicator: Primary Job

Position Number: CJS00051  IT Team Lead-Project Mgmt. Current

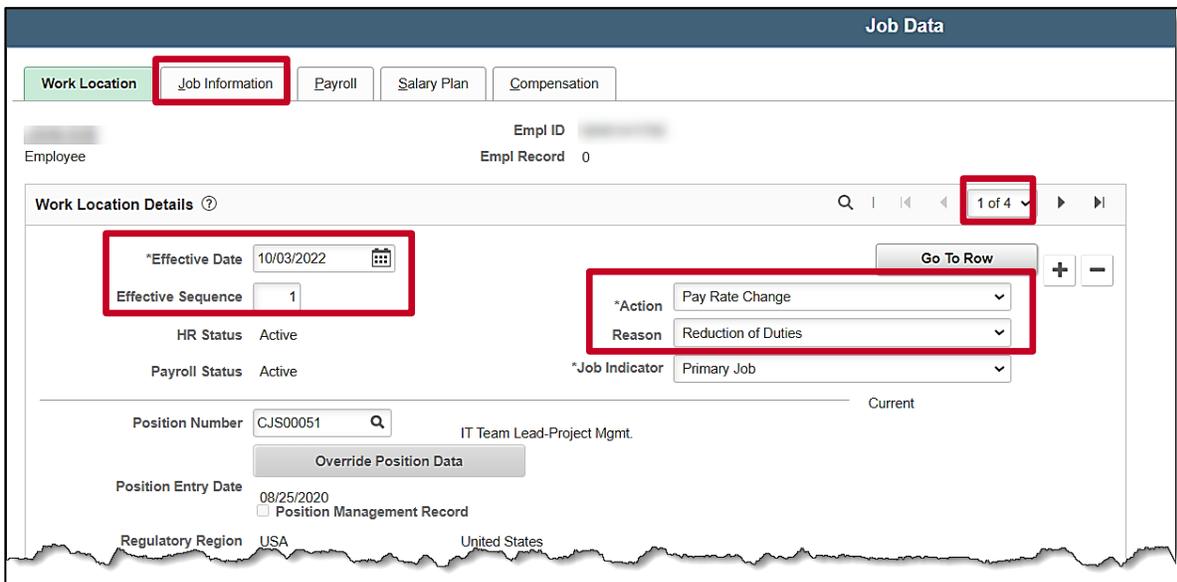
Position Entry Date: 08/25/2020 Override Position Data

Position Management Record

**Note:** The highest effective dated row should now be the Position Data Update just completed.

23. Click the **Add a New Row (+)** button to add a new row.

The page refreshes and the row count increments by 1.



**Job Data**

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

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

Work Location Details ②

\*Effective Date: 10/03/2022  Go To Row **+** **-**

Effective Sequence: 1 \*Action: Pay Rate Change

HR Status: Active Reason: Reduction of Duties

Payroll Status: Active \*Job Indicator: Primary Job

Position Number: CJS00051  IT Team Lead-Project Mgmt. Current

Position Entry Date: 08/25/2020 Override Position Data

Position Management Record

Regulatory Region: USA United States

24. Select the applicable effective date using the **Effective Date Calendar** icon.

**Note:** Use the same effective date that was used for the Position update.

25. Increment the **Effective Sequence** field by 1 since the same effective date as the Position Update is being used.

26. Click the **Action** field dropdown button and select “Pay Rate Change”.



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27. Select the applicable reason using the **Reason** field dropdown button.

28. Click the **Job Information** tab.

The **Job Information** tab displays.

The screenshot shows the 'Job Information' tab in an HR system. At the top, there are tabs for 'Work Location', 'Job Information' (selected), 'Payroll', 'Salary Plan', and 'Compensation'. Below the tabs, the employee's name is redacted, and the 'Empl ID' and 'Empl Record' (0) are visible. The 'Job Information Details' section includes a search bar and a 'Go To Row' button. The main area displays various fields: 'Effective Date' (10/03/2022), 'Effective Sequence' (1), 'HR Status' (Active), 'Payroll Status' (Active), 'Action' (Pay Rate Change), 'Reason' (Reduction of Duties), 'Job Indicator' (Primary Job), and 'Current'. Below this, 'Job Code' (39113) is 'Info Technology Specialist III', 'Entry Date' (08/25/2020), 'Supervisor Level' (E), 'Reports To' (CJS00146), 'Regular/Temporary' (Regular), and 'Empl Class' (Classified). The 'Full/Part' field is set to 'Quasi' and is highlighted with a red box. Other fields include 'SOC Code' (15-1041), 'Employee' (JOHN DOE), 'Chief Technology Officer' (00495887100), '\*Officer Code' (None), 'Shift Rate', and 'Shift Factor'. The 'Standard Hours' section shows 'Standard Hours' (40.00) and 'FTE' (1.000000), both highlighted with red boxes. There are checkboxes for 'Adds to FTE Actual Count?' and 'Encumbrance Override'.

29. Review the **Full/Part** field and ensure accuracy based on the Position update that was made.

30. Update the **Standard Hours** field to reflect the employee's new hours and tab out of the field.

**Note:** The **FTE** field will calculate after tabbing out of the **Standard Hours** field.



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The page refreshes.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Work Location, Job Information, Payroll, Salary Plan, and Compensation. The Compensation tab is highlighted with a red box. Below the navigation bar, there is a header area with 'Empl ID' and 'Empl Record 0'. The main content area is titled 'Job Information Details' and contains a table of employee information. The table has columns for Effective Date, Effective Sequence, HR Status, Payroll Status, Action, Reason, Job Indicator, and Current. The data row shows: Effective Date: 10/03/2022, Effective Sequence: 1, HR Status: Active, Payroll Status: Active, Action: Pay Rate Change, Reason: Reduction of Duties, Job Indicator: Primary Job, and Current: Current. Below the table, there are several fields for job and employee details: Job Code (39113), Entry Date (08/25/2020), Supervisor Level (E), Reports To (CJS00146), Regular/Temporary (Regular), Empl Class (Classified), Regular Shift (Not Applicable), Classified Ind (Classified), Info Technology Specialist III, SOC Code (15-1041), Employee (John Doe), Supervisor Name (CJS0014600495887100 JOHN DOE), Chief Technology Officer (00495887100 JOHN DOE), Full/Part (Quasi), \*Officer Code (None), Shift Rate, and Shift Factor. At the bottom, there is a 'Standard Hours' section with a text input field containing '35.00', a 'Work Period' dropdown set to 'W', and a 'Weekly' label. There are also checkboxes for 'Adds to FTE Actual Count?' and 'Encumbrance Override'.

31. Click the **Compensation** tab.



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The **Compensation** tab displays.

Compensation Details ?

Effective Date 10/03/2022 Go To Row

Effective Sequence 1 Action Pay Rate Change

HR Status Active Reason Reduction of Duties

Payroll Status Active Job Indicator Primary Job Current

Compensation Rate 2,000.000000 \*Frequency S Semimonthly

▶ Comparative Information ?

▶ Pay Rates ?

**Default Pay Components**

Pay Components ?

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 STATE	0	48,000.000000	USD	A		+	-

**Calculate Compensation**

Job Data [Employment Data](#) [Earnings Distribution](#) **[Benefits Program Participation](#)**

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

32. Click the **Default Pay Components** button.

33. Update the **Comp Rate** field.

**Note:** This calculation must be completed manually as Cardinal does not auto-calculate the Comp Rate. This calculation is based on the adjusted annual compensation percentage in correlation to the employee's new hours.

34. Click the **Calculate Compensation** button.

35. Click the **Benefits Program Participation** link.



The **Benefits Program Participation** page displays.

The screenshot shows the 'Benefit Program Participation' page for an employee. Key details include:

- Benefit Status:** Benefit Record Number 0, Effective Date 10/03/2022, Effective Sequence 1, HR Status Active, Payroll Status Active. Action: Pay Rate Change, Reason: Reduction of Duties, Job Indicator: Primary Job.
- Benefits Administration:** \*Benefits System: Benefits Administration, Benefits Employee Status: Active.
- Eligibility Fields:**
  - Elig Fld 1: [Empty]
  - Elig Fld 2: 140001000
  - Elig Fld 3: Y
  - Elig Fld 4: [Empty]
  - Elig Fld 5: [Empty]
  - Elig Fld 6: [Empty]
  - Elig Fld 7: [Empty]
  - Elig Fld 8: 12-24
  - Elig Fld 9: SQ-GB** (highlighted with a red box)

36. Update the **Elig Fld 9** field to the applicable value based on the following:

Valid Values	Definitions
SF-GB	Full Time Employee
SP-GB	Part Time Employee
SQ-GB	Quasi Employee

37. Click the **Save** button.

38. Highlight the employee's **Employee ID** and copy it (right click on mouse and select "Copy").

39. Use the following navigation path to run the Employee Activity Report:

**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**

40. Run the **Employee Activity Report** for the employee.

**Note:** For additional information, refer to the **Cardinal HCM Human Resources Reports Catalog** which is located on the Cardinal Website under **Resources**.

41. Print the report and place it in the employee's file for future audit requests.