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:

- 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
- 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.

This document does not cover the steps to upload the transfer information to the Cardinal system.

This document does not address the steps required if an Agency has been abolished or is consolidated with another Agency. The impacted Agency must work with The Department of Human Resource Management (DHRM) and the Cardinal Post Production Support (PPS) Team to transfer position and job records as needed.

Per DHRM policy regarding 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 in the military, National Guard, or Reserves 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.

Table of Contents

Revision History 3
Transferring an Employee from a Wage Position to a Wage Position or from a Salary Position to a Salary Position 4
Transferring an Employee from a Wage Position to a Salary Position or from a Salary Position to a Wage Position 21
Agency Next Steps After Intra-Agency Transfer 22

Revision History

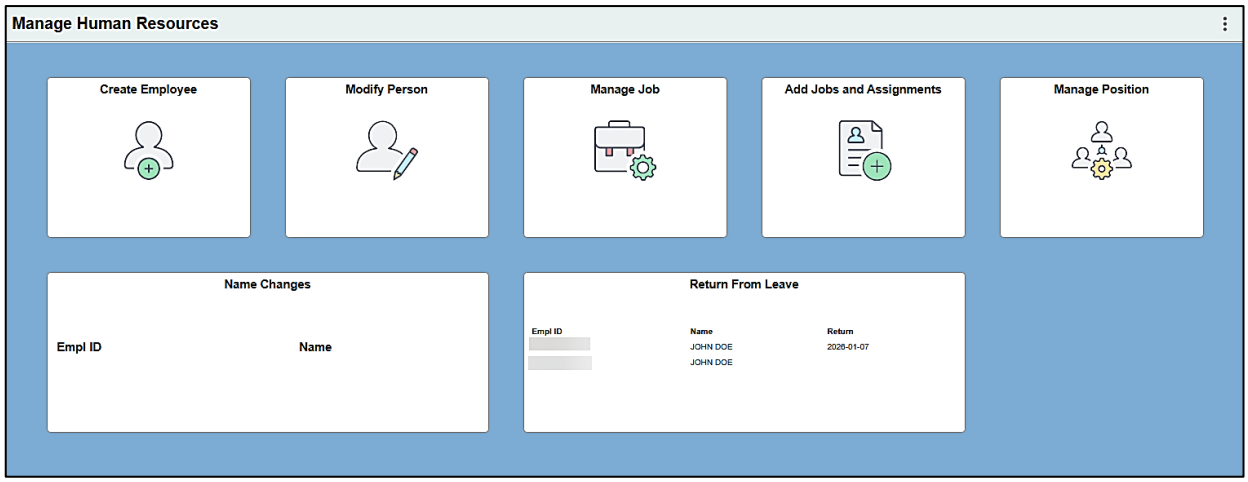
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
3/1/2025	Updated the screenshots of the Search pages. Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Transferring an Employee from a Wage Position to a Wage Position or from a Salary Position to a Salary Position

Before beginning, ensure that all necessary data is accessible and ready for data entry and that the position in which the employee will be transferred into has been reviewed for accuracy. This includes verifying whether the position is eligible for telework.

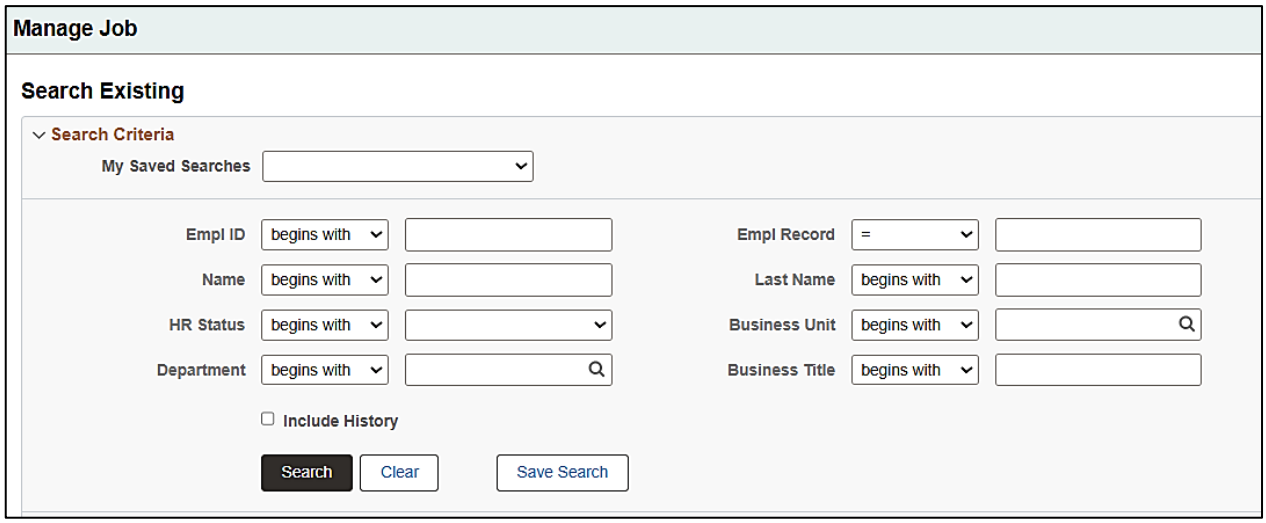
For more information on reviewing Position Data, see the Job Aid titled **HR351 Managing Position Data** located on the Cardinal website in **Job Aids** under **Learning.**

The example used in this scenario is a salary to salary Intra-Agency Transfer. The same process can be used for a wage to wage Intra-Agency Transfer.

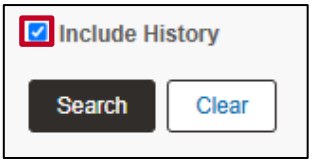
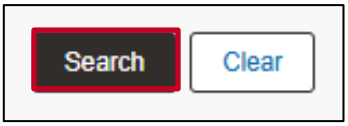
Step	Action
1.	Navigate to the **Job Actions Summary** page by clicking the **Manage Human Resources** tile on the **Cardinal HCM Homepage**.
The **Manage Human Resources** page displays.  	

Step	Action
2.	Click the **Manage Job** tile.

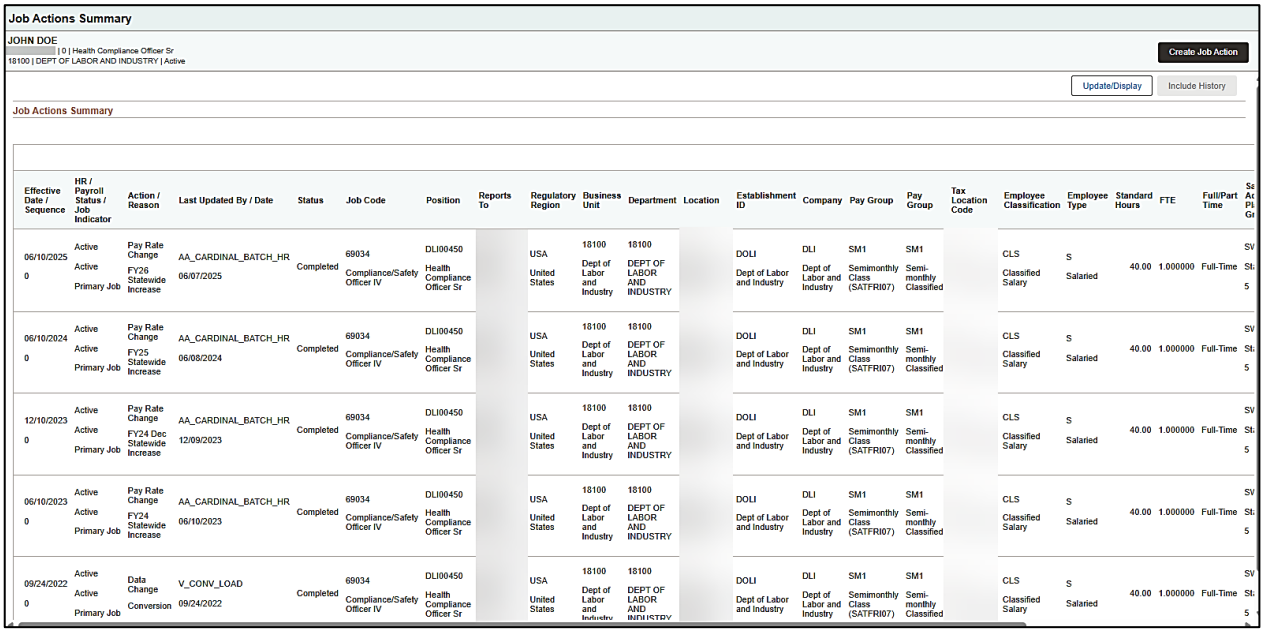
The **Manage Job Search Existing** page displays.



	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**.
3.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

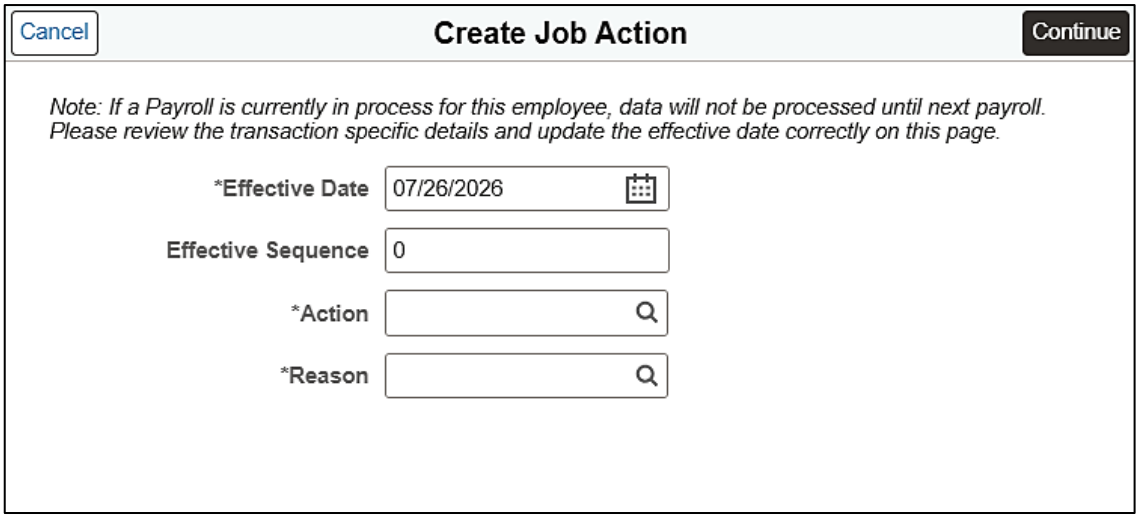
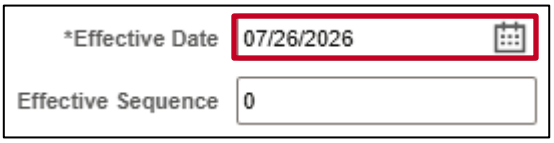
Step	Action
4.	Click the **Include History** checkbox option. 
5.	Click the **Search** button. 

The **Job Actions Summary** page displays.



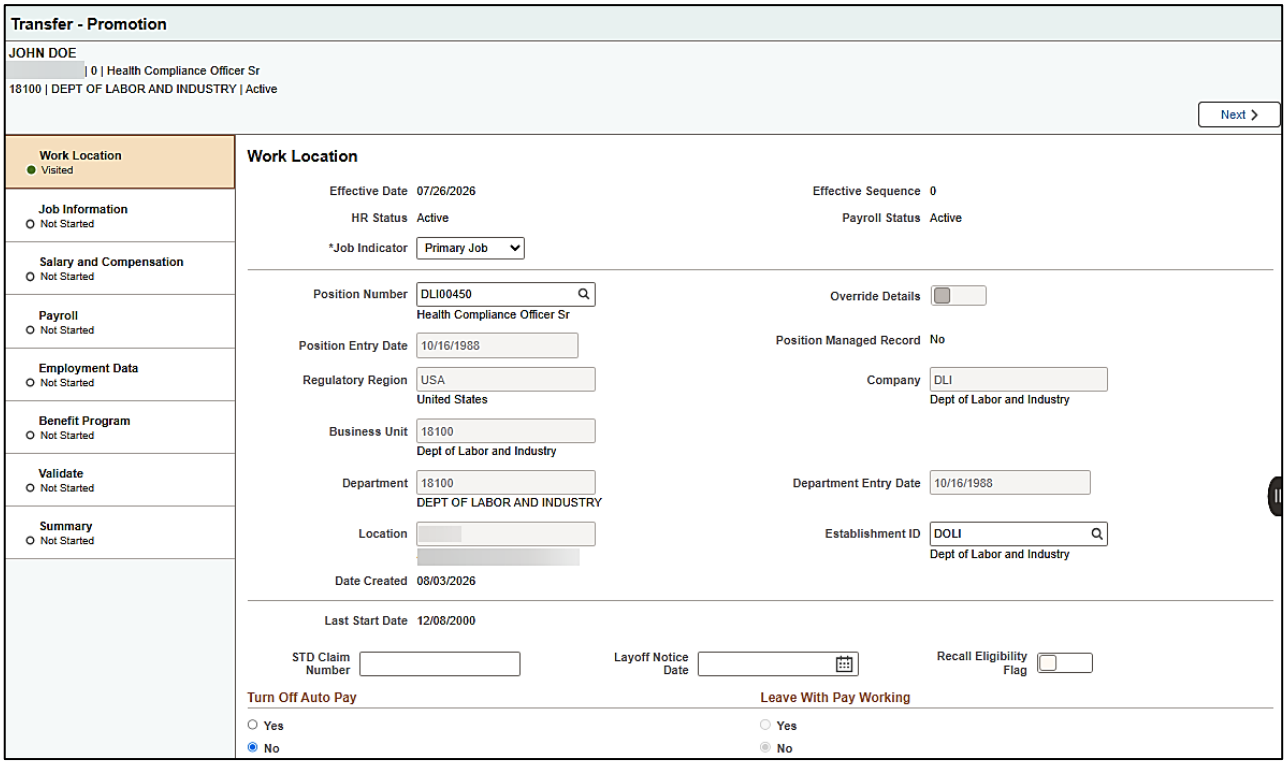
Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group	Pay Group	Tax Location Code	Employee Classification	Employee Type	Standard Hours	FTE	Full/Part Time
06/10/2025 0	Active Active Primary Job	Pay Rate Change FY26 Statewide Increase	AA_CARDINAL_BATCH_HR 06/07/2025	Completed	69034 Compliance/Safety Officer IV	DLI00450 Health Compliance Officer Sr		USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY		DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	SM1 Semi-monthly Classified		CLS Classified Salary	S Salaried	40.00	1.000000	Full-Time
06/10/2024 0	Active Active Primary Job	Pay Rate Change FY25 Statewide Increase	AA_CARDINAL_BATCH_HR 06/08/2024	Completed	69034 Compliance/Safety Officer IV	DLI00450 Health Compliance Officer Sr		USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY		DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	SM1 Semi-monthly Classified		CLS Classified Salary	S Salaried	40.00	1.000000	Full-Time
12/10/2023 0	Active Active Primary Job	Pay Rate Change FY24 Dec Statewide Increase	AA_CARDINAL_BATCH_HR 12/09/2023	Completed	69034 Compliance/Safety Officer IV	DLI00450 Health Compliance Officer Sr		USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY		DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	SM1 Semi-monthly Classified		CLS Classified Salary	S Salaried	40.00	1.000000	Full-Time
06/10/2023 0	Active Active Primary Job	Pay Rate Change FY24 Statewide Increase	AA_CARDINAL_BATCH_HR 06/10/2023	Completed	69034 Compliance/Safety Officer IV	DLI00450 Health Compliance Officer Sr		USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY		DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	SM1 Semi-monthly Classified		CLS Classified Salary	S Salaried	40.00	1.000000	Full-Time
09/24/2022 0	Active Active Primary Job	Data Change Conversion	V_CONV_LOAD 09/24/2022	Completed	69034 Compliance/Safety Officer IV	DLI00450 Health Compliance Officer Sr		USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY		DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	SM1 Semi-monthly Classified		CLS Classified Salary	S Salaried	40.00	1.000000	Full-Time

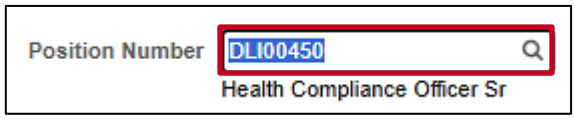
6.	Click the **Create Job Action** button to add a new effective dated row.

Step	Action
The **Create Job Action** page displays in a pop-up window. 	
7.	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**: The **Effective Sequence** field will auto-populate. 
	For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating** located on the Cardinal website in **Job Aids** under **Learning**.
8.	Click the **Action** dropdown button and select “XFR” (“Transfer”).
9.	Click the **Reason** dropdown button and select the applicable Reason code. For this example, “PRO” (“Promotion”) has been selected.
	For further information pertaining to valid Action and Reason code combinations, see the Job Aid titled **HR351 Action Reason Codes** located on the Cardinal website in **Job Aids** under **Learning**.

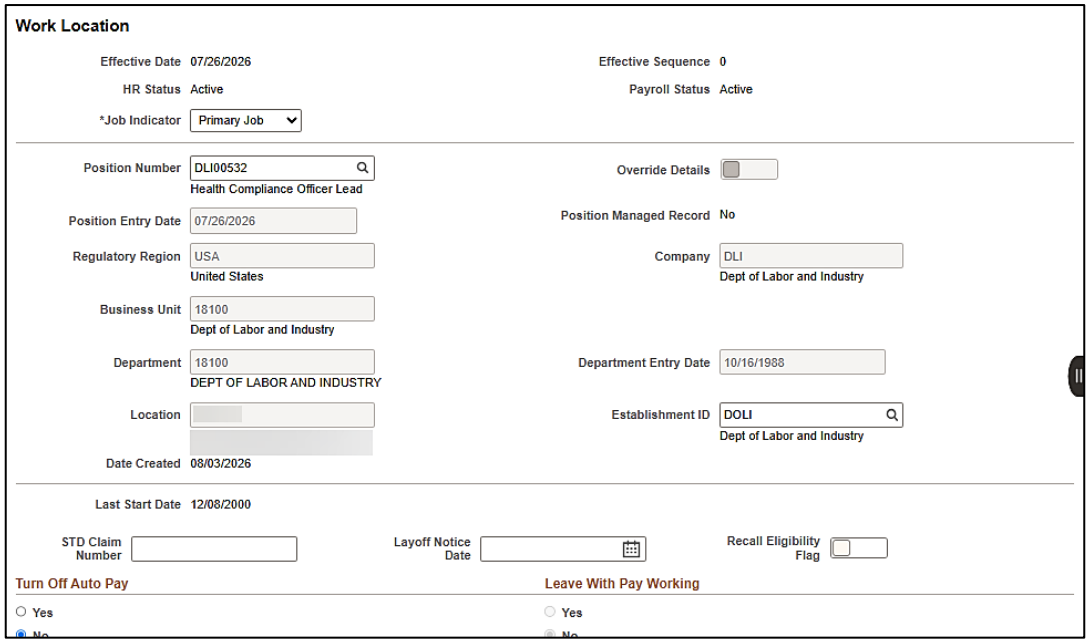
Step	Action
10.	Click the **Continue** button.

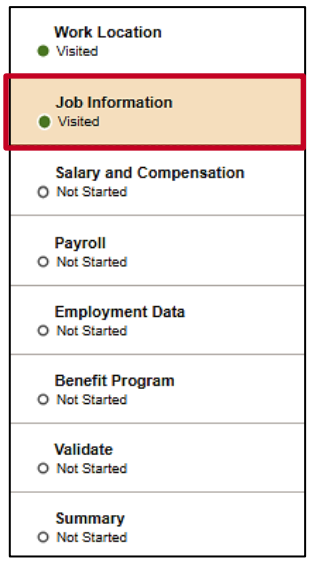
The **Work Location** page displays.



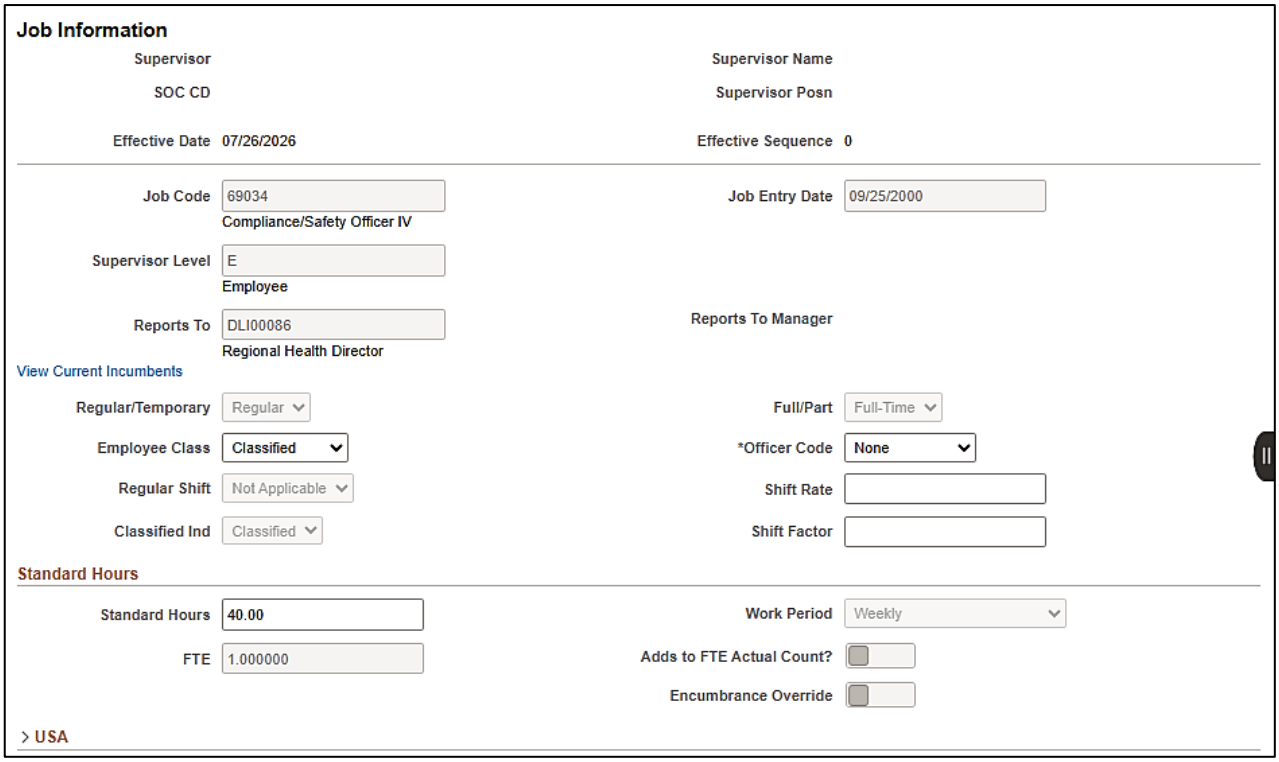
11.	Enter the new Position Number in the **Position Number** field, or select the new Position Number using the **Look up** icon. 
12.	Press the **Tab** key on the keyboard to tab out of the field.

Step	Action
	The **Work Location** page refreshes.



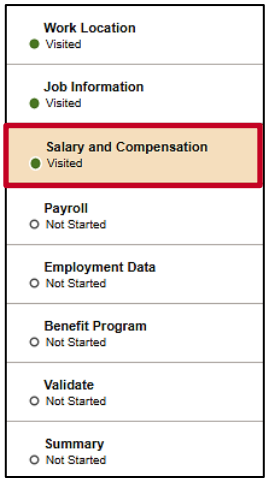
13.	The remaining Position Data populates based upon the selected Position Number. Review the information. If the Position Data is not correct, cancel the transaction and make corrections to the Position Data before assigning the employee to the position. For further information on updating Position Data, see the Job Aid titled **HR351 Managing Position Data** located on the Cardinal website in **Job Aids** under **Learning**.
14.	Once the Position Data is validated, click the **Job Information** tab. 

Step	Action
	The **Job Information** page displays.

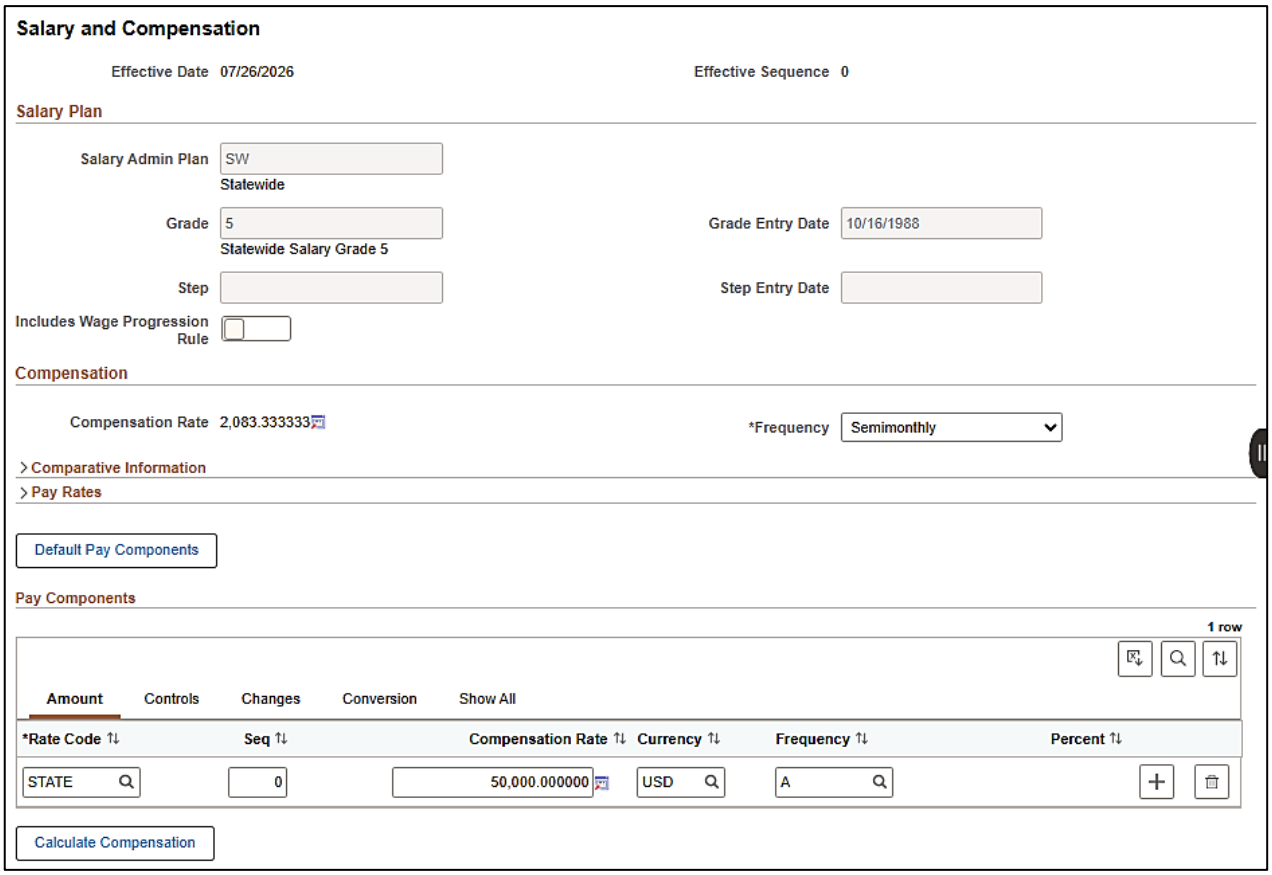


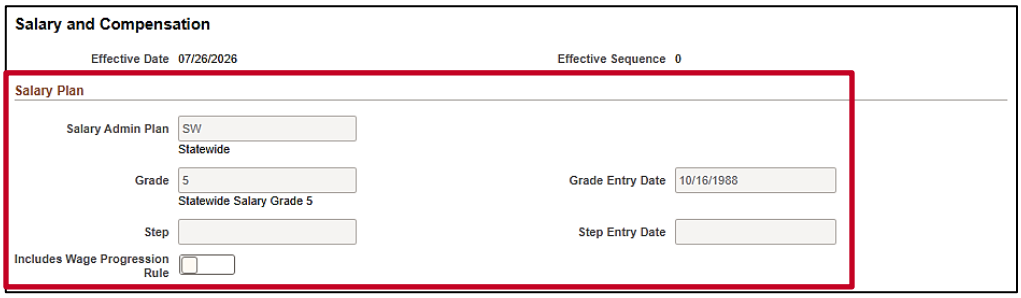
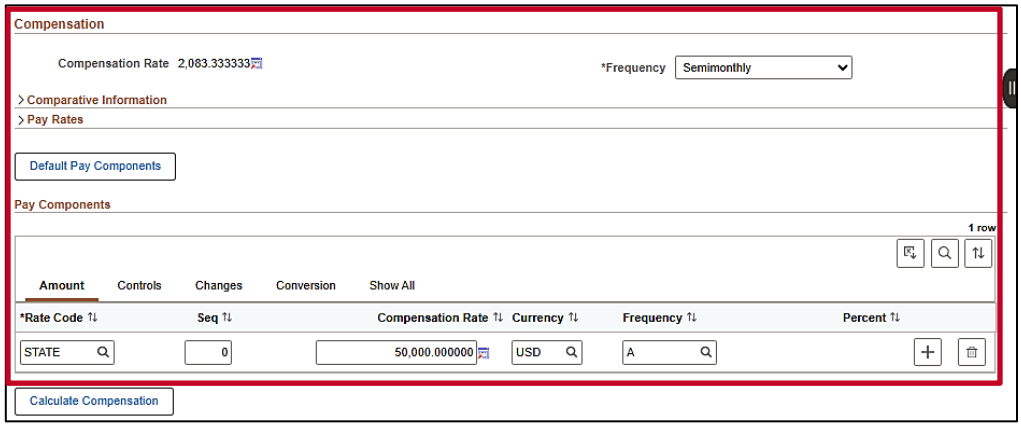
15.	Review the Job Information. If the Job Information is not correct, cancel the action and make corrections to the Position Data before assigning the employee to the position. For further information on updating Position Data, see the Job Aid titled **HR351 Managing Position Data** located on the Cardinal website in **Job Aids** under **Learning**.
	The **Action/Reason, Employee Class,** and **Job Code** are key fields in the nightly extract file from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if incorrect data is entered. For further information on selecting the appropriate employee classification, see the Job Aid titled **HR351 Employee Class Overview** located on the Cardinal website in **Job Aids** under **Learning**.

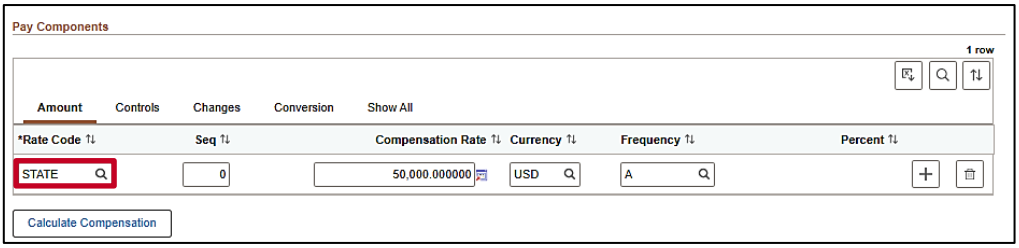
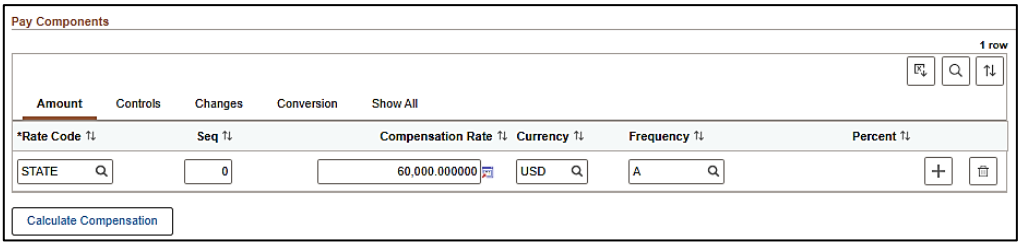
Step	Action
16.	Click the **Salary and Compensation** tab.



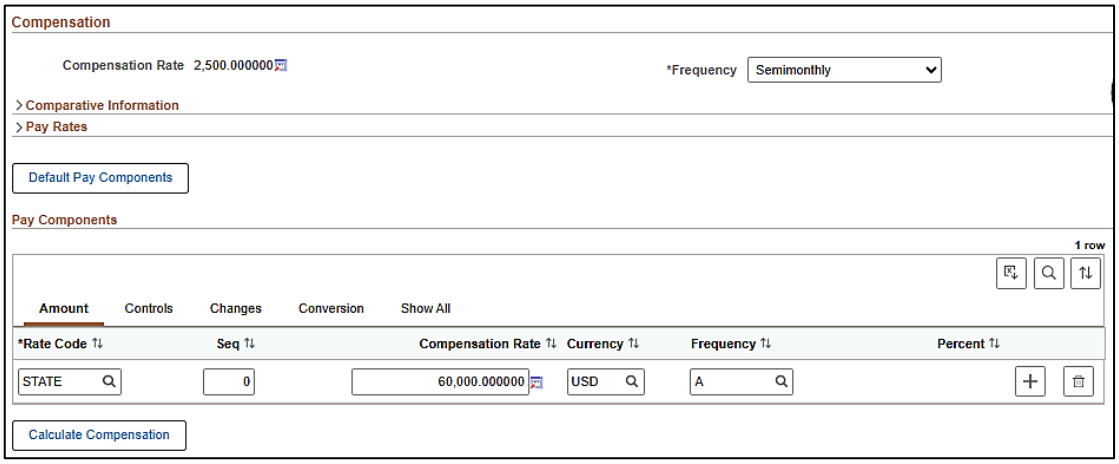
The **Salary and Compensation** page displays.



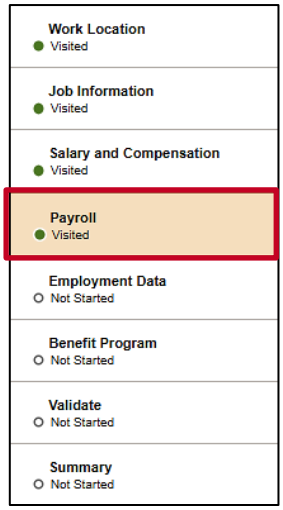
Step	Action
17.	Review the **Salary Plan** section. If the Salary Plan information is not correct, cancel the transaction and make corrections to the Position Data before assigning the employee to the position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion. 
	For further information on updating Position Data, see the Job Aid titled **HR351 Managing Position Data** located on the Cardinal website in **Job Aids** under **Learning**.
18.	Review the compensation information for the employee. If no updates are needed, proceed to **Step 23**. 
19.	If updates to the compensation information for the employee are needed, click the **Default Pay Components** button.

Step	Action
20.	Update the Rate Code as needed using the **Rate Code Look up** icon. 
21.	Ener the new compensation rate in the **Compensation Rate** field as needed. 
	The **Currency** will always be “USD” and the **Frequency** field defaults based on the Rate Code selected. Do not update these fields.
22.	Click the **Calculate Compensation** button.

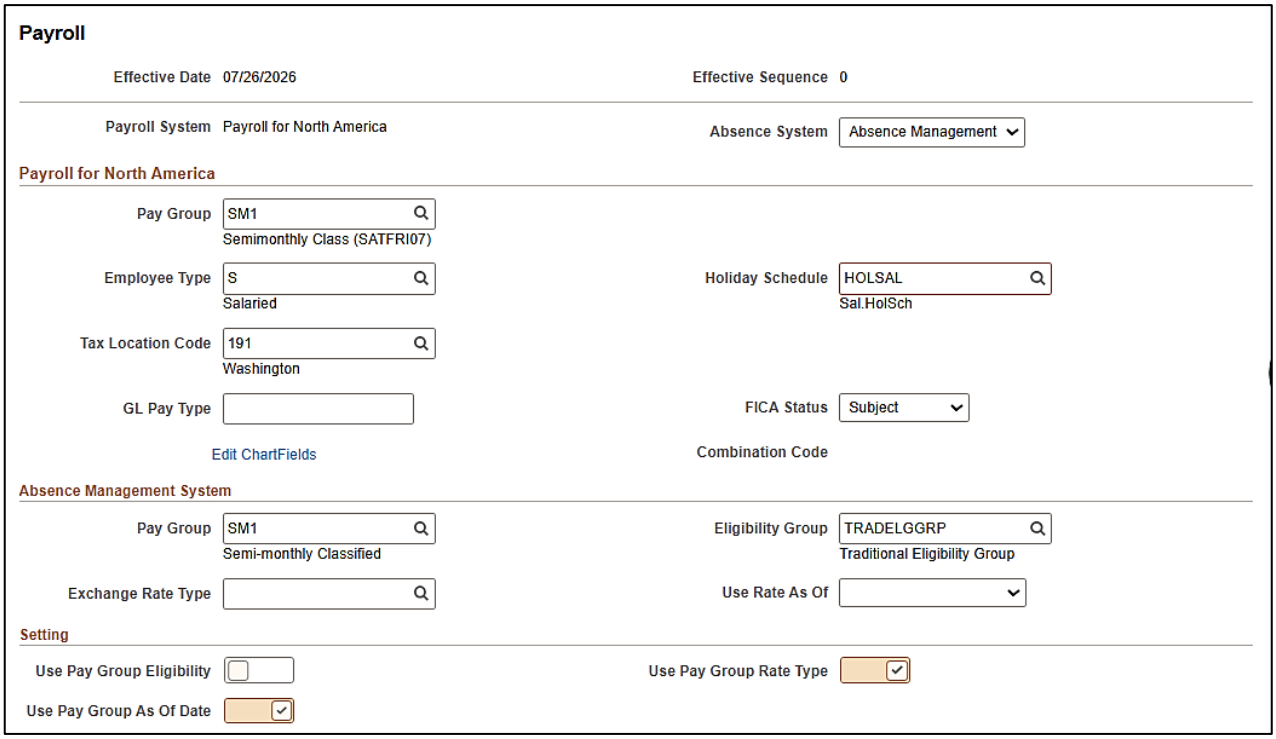
The **Compensation** section refreshes.

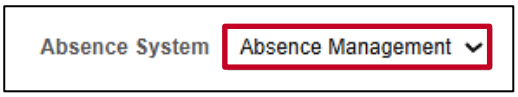
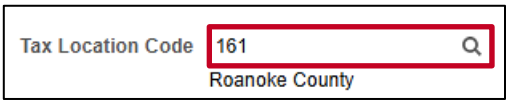
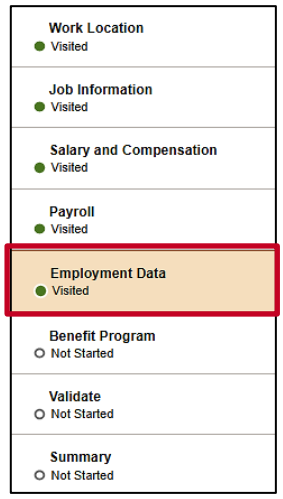


Step	Action
23.	Click the **Payroll** tab.

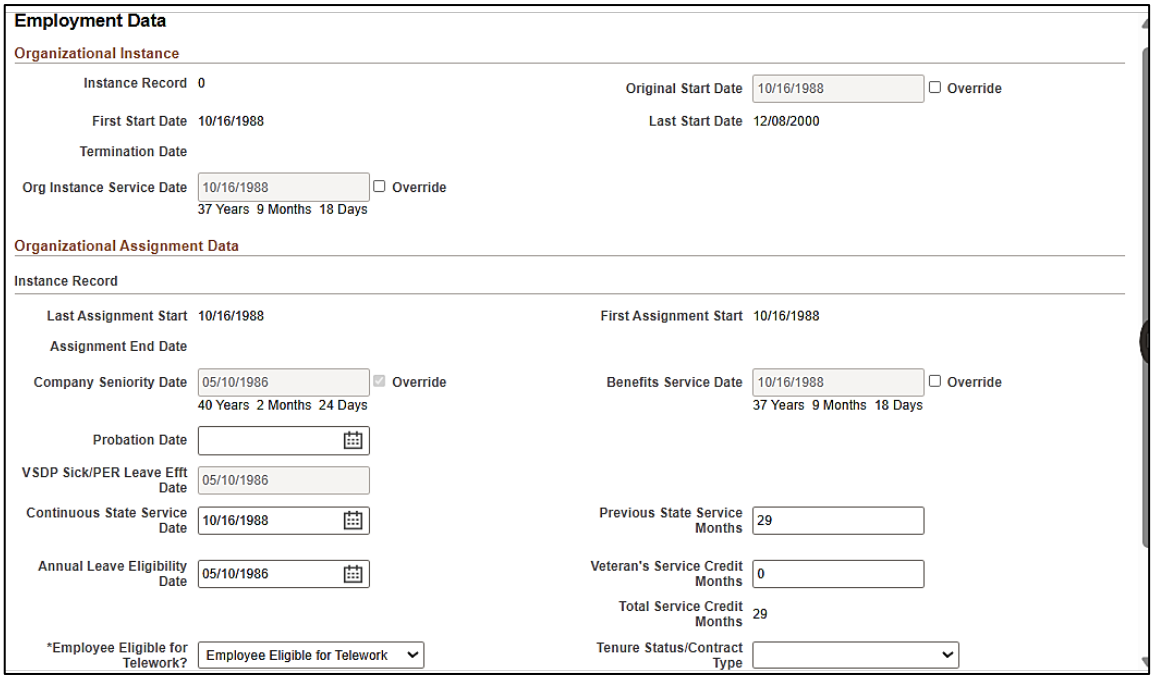


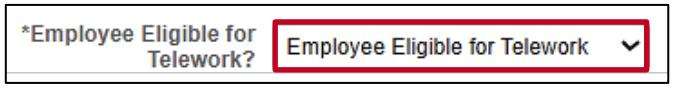
The **Payroll** page displays.



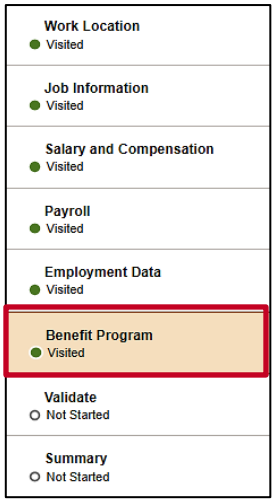
Step	Action
	If the employee is a wage employee or the Agency does not use Cardinal Absence Management, the **Absence System** field should display “Other”. If the employee is a salaried employee and the Agency uses Cardinal Absence Management, the field should display “Absence Management”.  The **Absence Management** section is visible only if “Absence Management” is selected in the **Absence System** field, otherwise this section is hidden.
24.	Update the **Tax Location Code** field if applicable. 
	Updates made to the **Tax Location Code** field will update the **Tax Data** pages in the Payroll module. Please notify your Payroll Administrator if a change was made.
25.	Click the **Employment Data** tab. 

Step	Action
	The **Employment Data** page displays.

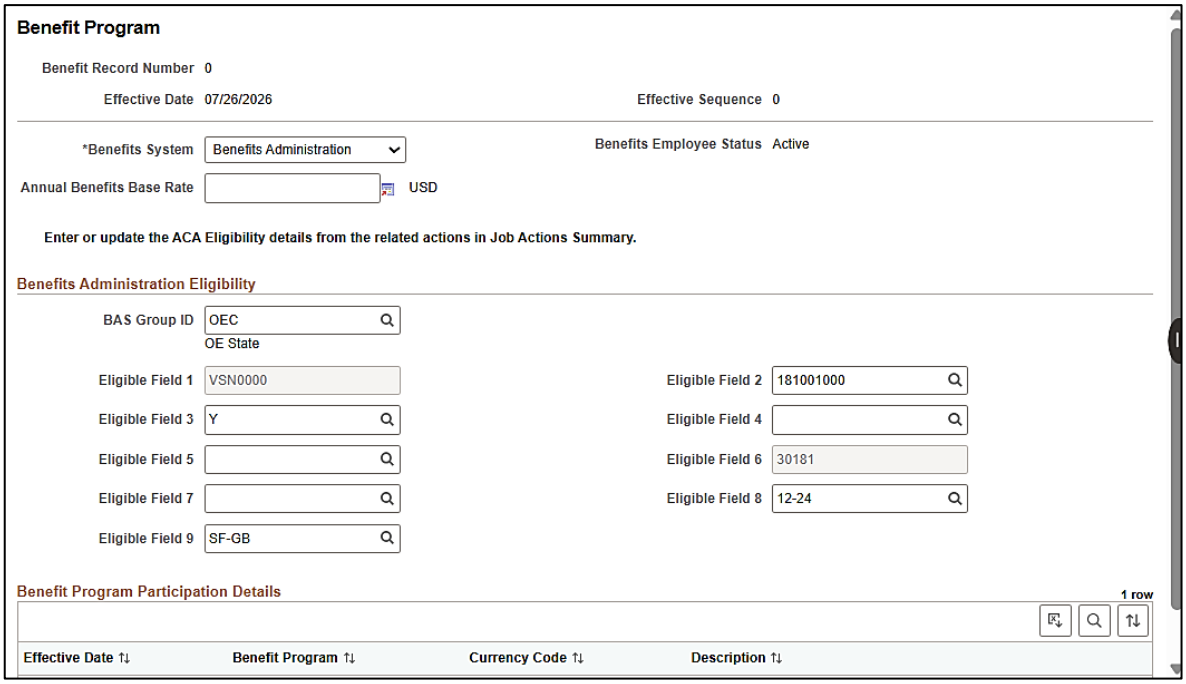


26.	Review the information on the **Employment Data** page for accuracy and update as needed.
27.	Click the **Employee Eligible for Telework?** dropdown button and select the applicable value. 
	Before recording the employee's telework status, the Agency HR administrator should verify and/or update the following if the employee will be teleworking: The **Available for Telework** field = "Y" (Yes) on the employee's position record. For further information on selecting the appropriate telework option, see the Job Aid titled **HR351 Managing Employee Teleworker Data** located on the Cardinal website in **Job Aids** under **Learning**.

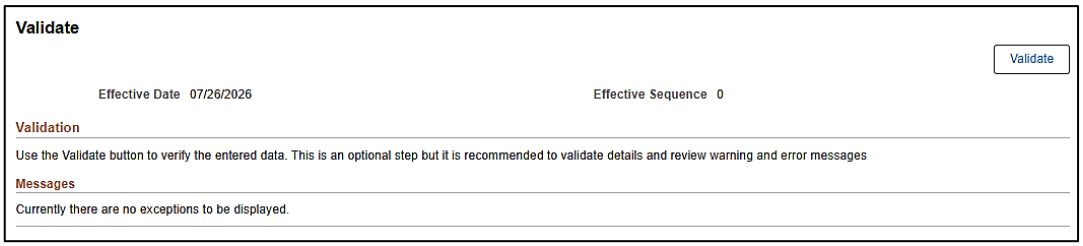
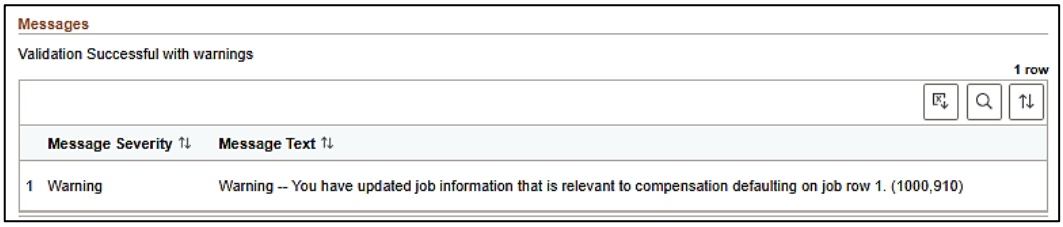
Step	Action
28.	Click the **Benefit Program** tab.



The **Benefit Program** page displays.

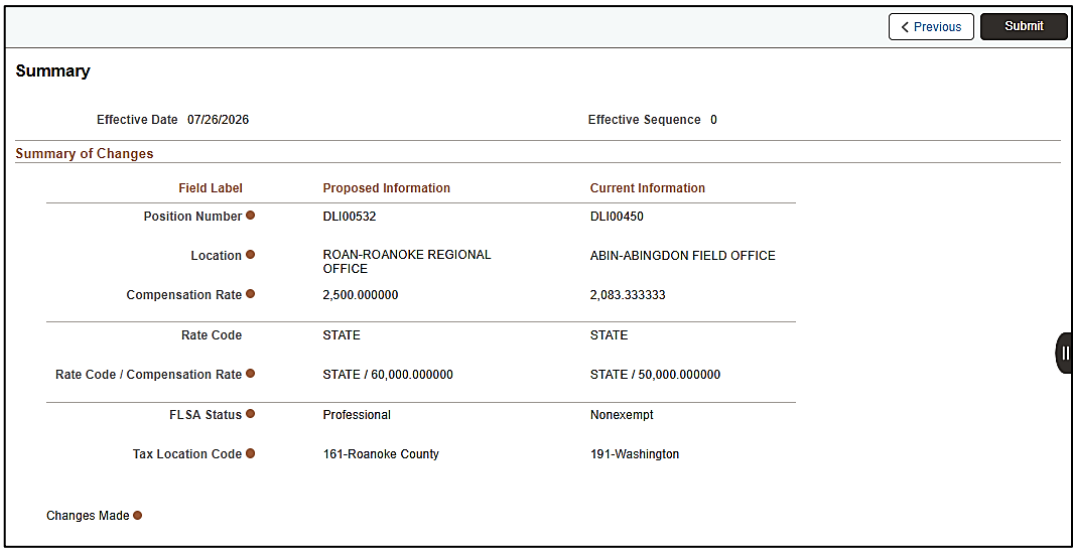


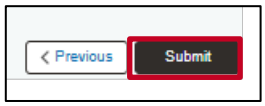
29.	Review the Benefit Program information and validate for accuracy.
	If any of the Benefit Program information is not correct, coordinate with a Benefits Administrator. For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields** located on the Cardinal website in **Job Aids** under **Learning**.

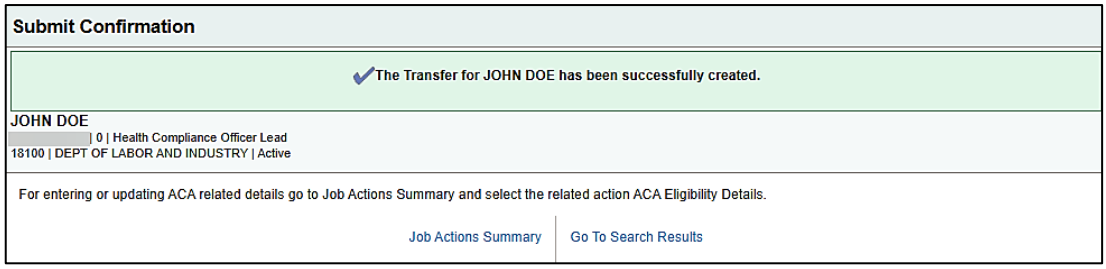
Step	Action
30.	Click the **Validate** tab.
The **Validate** page displays.  	
31.	Click the **Validate** button.
The **Validation** page refreshes with a **Messages** section.  	
32.	Review the **Messages** section. **Note**: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting (the **Messages** section will display an **Error** message and the validation will fail). Select the **Proceed with warning** checkbox option if applicable.

Step	Action
33.	Click the **Summary** tab.

The **Summary** page displays.



34.	Review the **Summary of Changes** section, and then click the **Submit** button. 

Step	Action
The **Submit Confirmation** page displays. 	
35.	Proceed to the Agency Next Steps After Intra-Agency Transfer section.

Transferring an Employee from a Wage Position to a Salary Position or from a Salary Position to a Wage Position

Before beginning, ensure that all necessary data is accessible and ready for data entry. A wage position and salaried position cannot exist on the same employee record. Therefore, the position the employee is transferring from must be terminated and a new employment instance must be entered to create a new employee record for the new position.

Note: For further information on terminating positions and adding new employment instances, see the Job Aids titled **HR351 Separation Statuses** and **HR351 Creating a New Hire**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**

Agency Next Steps After Intra-Agency Transfer

- Be sure to add a telework agreement if one has been established.
    - For further information on telework, see the Job Aid titled **HR351 Maintain Employee Teleworker Data** located 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** located on the Cardinal website in **Reports Catalogs** under **Resources**.
- Communicate with the employee to update 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.
- Coordinate with Agency Benefits Administrators to ensure that eligible employees complete their benefit elections (within 30 days per OHB policy).
    - For further information on completing benefit elections, see the Job Aid titled, **BN361 Completing a New Hire Enrollment** located on the Cardinal website in **Job Aids** under **Learning**.
- Coordinate with an Agency Time and Labor (TL) Administrator to ensure that all employees are assigned the applicable Work Schedule (can be assigned by either a TL Administrator or the employee's supervisor) and review their TA eligibilities (e.g., overtime, comp leave, etc.).
    - For further information on assigning Work Schedules, see the Job Aid titled **TA Maintaining Employee Work Schedules** located on the Cardinal website in **Job Aids** under **Learning**.