



### Overview of Effective Dating

Effective dating enables the ability to keep historical, current, and future-dated information and provides the ability to update existing information without losing or overwriting the data already in Cardinal.

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# Human Resources Job Aid

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## HR351 Overview of Effective Dating

### Revision History

| Revision Date | Summary of Changes                                                       |
|---------------|--------------------------------------------------------------------------|
| 9/1/2026      | Updated to reflect the Cardinal system upgrades.                         |
| 7/25/2025     | Added an explanation note regarding a new Position Effective Date error. |
| 1/16/2025     | Baseline.                                                                |

### Overview of Effective Dating

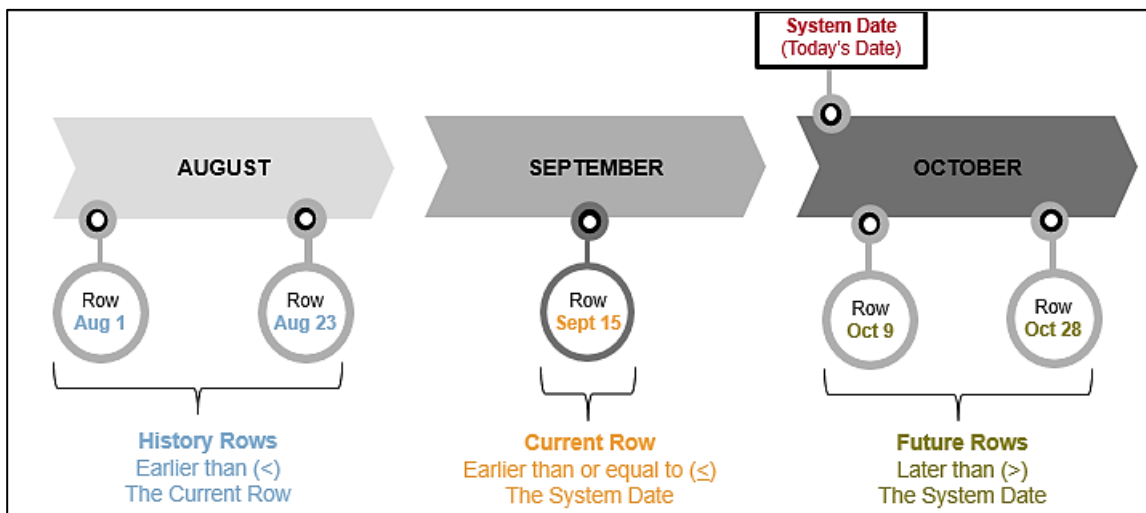
It is imperative to retain existing data in the database when entering new information related to existing data, (e.g., incumbent position transfer, pay rate change). To retain history, an effective dated row is added. This is a data row identified by a date that indicates when the new information goes into effect.

Effective dating provides the ability to store historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

The following table provides high-level overview information for each type of effective dating row:

| Types of Effective Dated Rows | Criteria                                           | Number of Rows Allowed | View Access | Update Access | Insert Access |
|-------------------------------|----------------------------------------------------|------------------------|-------------|---------------|---------------|
| History                       | Effective Date < Effective Date of the Current Row | Zero to Many           | Yes         | No            | No            |
| Current                       | Effective Date ≤ Today's Date                      | One                    | Yes         | No            | Yes           |
| Future                        | Effective Date > Today's Date                      | Zero to Many           | Yes         | Yes           | Yes           |

The following diagram displays an example of history, current, and future effective dates:



**Tips:** Multiple actions with the same effective date on the employee's job record are handled by using the effective sequence field found in the **Work Location** section on the **Job Data** page to differentiate actions with the same effective date. The record row with the lowest number becomes a historical row of data when a new sequence is added.



# Human Resources Job Aid

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Example of how the Personal Data Record and the Job Data Record effective dates impact each other:

| Step                                                                              | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                        |                        |                         |             |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
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|  | <p>The effective date of the hire on the Job Data Record cannot occur earlier than the effective date on the Personal Data Record.</p> <p><b>Note:</b> In this example, the Personal Data Effective Date is 06/21/2026.</p> <div><p><b>Step 1 of 2: Person Data</b></p><p>Person Details</p><p>Names</p><table border="1"><thead><tr><th>Format Type</th><th>Effective Date</th><th>Display Name</th><th>Formal Name</th></tr></thead><tbody><tr><td>English</td><td>06/21/2026</td><td>JOHN DOE</td><td>JOHN DOE</td></tr><tr><td>CURRENT</td><td></td><td></td><td></td></tr></tbody></table></div> <p><b>Note:</b> In this example, the Job Data Effective Date of Hire is 06/21/2026. The Job Data Effective Date must occur on or later than the date of the Personal Data Effective Date.</p> <div><p><b>Job Details</b></p><p>JOHN DOE</p><p>18100   DEPT OF LABOR AND INDUSTRY   Active</p><p>Effective Date 06/21/2026</p><p>Sequence 0</p><p>Action Hire Reason New Hire</p></div> <p><b>Note:</b> The effective date of any Job Data modifications must occur on or later than the effective date of the current Job Data Effective Date. Submit a help desk ticket to the Cardinal Post Production Support (PPS) team if there is a requirement to insert a transaction prior to the current Job Data Effective Date.</p> <div><p><b>Job Actions Summary</b></p><p>JOHN DOE</p><p>18100   DEPT OF LABOR AND INDUSTRY   Active</p><p>Create Job Action</p><p>Update/Display Include History</p><table border="1"><thead><tr><th>Effective Date / Sequence</th><th>Job Indicator</th><th>Action / Reason</th><th>Last Updated By / Date</th><th>Status</th><th>Job Code</th></tr></thead><tbody><tr><td>06/21/2026 0</td><td>Primary Job</td><td>Hire New Hire</td><td>JOHN DOE 06/29/2026</td><td>Completed</td><td>69034</td></tr></tbody></table><div><p><b>Create Job Action</b></p><p>Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.</p><p>*Effective Date 07/15/2026</p><p>Effective Sequence 0</p><p>*Action PAY Pay Rate Change</p><p>*Reason CSO Competitive Salary Offer</p></div><table border="1"><thead><tr><th>Company</th><th>Pay Group</th><th>Pay Group</th><th>Tax Location Code</th><th>Employee Classification</th><th>Emp Type</th></tr></thead><tbody><tr><td>DLI</td><td>SM1</td><td>SM1</td><td>075</td><td>CLS</td><td>S</td></tr><tr><td>Dept of Labor and Industry</td><td>Semimonthly Class (SATFRI07)</td><td>Semimonthly Classified</td><td>Goochland</td><td>Classified Salary</td><td>Salary</td></tr></tbody></table></div> | Format Type            | Effective Date         | Display Name            | Formal Name | English | 06/21/2026 | JOHN DOE | JOHN DOE | CURRENT |  |  |  | Effective Date / Sequence | Job Indicator | Action / Reason | Last Updated By / Date | Status | Job Code | 06/21/2026 0 | Primary Job | Hire New Hire | JOHN DOE 06/29/2026 | Completed | 69034 | Company | Pay Group | Pay Group | Tax Location Code | Employee Classification | Emp Type | DLI | SM1 | SM1 | 075 | CLS | S | Dept of Labor and Industry | Semimonthly Class (SATFRI07) | Semimonthly Classified | Goochland | Classified Salary | Salary |
| Format Type                                                                       | Effective Date                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            | Display Name           | Formal Name            |                         |             |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
| English                                                                           | 06/21/2026                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | JOHN DOE               | JOHN DOE               |                         |             |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
| CURRENT                                                                           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                        |                        |                         |             |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
| Effective Date / Sequence                                                         | Job Indicator                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Action / Reason        | Last Updated By / Date | Status                  | Job Code    |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
| 06/21/2026 0                                                                      | Primary Job                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               | Hire New Hire          | JOHN DOE 06/29/2026    | Completed               | 69034       |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
| Company                                                                           | Pay Group                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Pay Group              | Tax Location Code      | Employee Classification | Emp Type    |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
| DLI                                                                               | SM1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | SM1                    | 075                    | CLS                     | S           |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |
| Dept of Labor and Industry                                                        | Semimonthly Class (SATFRI07)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | Semimonthly Classified | Goochland              | Classified Salary       | Salary      |         |            |          |          |         |  |  |  |                           |               |                 |                        |        |          |              |             |               |                     |           |       |         |           |           |                   |                         |          |     |     |     |     |     |   |                            |                              |                        |           |                   |        |



# Human Resources Job Aid

## HR351 Overview of Effective Dating

Example of how the Position Data and Job Data Record effective dates impact each other:

| Step                                                                              | Action                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |            |        |        |      |           |          |       |      |   |        |       |       |      |  |         |         |  |             |  |  |  |  |           |          |  |  |  |  |  |  |          |        |
|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|--------|--------|------|-----------|----------|-------|------|---|--------|-------|-------|------|--|---------|---------|--|-------------|--|--|--|--|-----------|----------|--|--|--|--|--|--|----------|--------|
|  | <p>In this example, the Position Data Effective Date is 09/13/2025.</p> <div><b>View Position</b><br/>Position Number DLI00206<br/>Headcount Status Filled<br/>Current Head Count 1 of 1<br/><br/><div>Effective Date 09/13/2025</div><div>Effective Sequence 0</div><div>Reason RTC Reports To/Supv Change</div><div>Approval Status Approved</div><div>&lt;&lt; Previous Next &gt;&gt;</div></div> <p><b>Note:</b> The incumbent employee's Job Data Effective Date must be on or later than the Position Data Effective Date.</p> <div><b>Job Details</b><br/>JOHN DOE<br/>Safety Compliance Officer<br/>18100   DEPT OF LABOR AND INDUSTRY   Active<br/><br/><div>Effective Date 09/13/2025</div><div>Sequence 0</div><div>Action Position Change</div><div>Reason Reports To/Supv Change</div></div> <p><b>Note:</b> If a position change precedes the highest effective dated row on the incumbent's job an error message will display in a pop-up window. Change the effective date as stated in the note above.</p> <div><div>Cancel Create Job Action Continue</div><div>Effective Date / Sequence HR / Payroll Status / Job Indicator Action Reason</div><div>Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.</div><div>*Effective Date 07/22/2025</div><div>Effective date/sequence must be greater than effective date/sequence of current record.<br/>An effective date or sequence number has been entered that is not greater than the effective date or sequence of the current record and you are in Update mode. Either enter an effective date/sequence that is greater than the current record, or change your mode to Correction.</div><div>OK</div><table><tr><td>06/21/2025</td><td>Active</td><td>Positi</td><td>Chan</td><td></td><td>00</td><td>18100</td><td>HENR</td></tr><tr><td>0</td><td>Active</td><td>Repor</td><td>To/Su</td><td>Chan</td><td></td><td>DEPT OF</td><td>HENRICO</td></tr><tr><td></td><td>Primary Job</td><td></td><td></td><td></td><td></td><td>LABOR AND</td><td>REGIONAL</td></tr><tr><td></td><td></td><td></td><td></td><td></td><td></td><td>INDUSTRY</td><td>OFFICE</td></tr></table></div> | 06/21/2025 | Active | Positi | Chan |           | 00       | 18100 | HENR | 0 | Active | Repor | To/Su | Chan |  | DEPT OF | HENRICO |  | Primary Job |  |  |  |  | LABOR AND | REGIONAL |  |  |  |  |  |  | INDUSTRY | OFFICE |
| 06/21/2025                                                                        | Active                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Positi     | Chan   |        | 00   | 18100     | HENR     |       |      |   |        |       |       |      |  |         |         |  |             |  |  |  |  |           |          |  |  |  |  |  |  |          |        |
| 0                                                                                 | Active                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | Repor      | To/Su  | Chan   |      | DEPT OF   | HENRICO  |       |      |   |        |       |       |      |  |         |         |  |             |  |  |  |  |           |          |  |  |  |  |  |  |          |        |
|                                                                                   | Primary Job                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |            |        |        |      | LABOR AND | REGIONAL |       |      |   |        |       |       |      |  |         |         |  |             |  |  |  |  |           |          |  |  |  |  |  |  |          |        |
|                                                                                   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |            |        |        |      | INDUSTRY  | OFFICE   |       |      |   |        |       |       |      |  |         |         |  |             |  |  |  |  |           |          |  |  |  |  |  |  |          |        |

Example of how the Personal Data, Job Data, and Benefit Record effective dates impact each other:

Step

Action

i

The current active row on the effective dated tables is the row with the most recent effective date less than or equal to the current date.

- Agencies must submit a help desk ticket to the Cardinal Post Production Support (PPS) team to update current rows and history rows
- Agencies can enter new rows with effective dates greater than the most current row, including future-dated rows

**Note:** In this example, the Personal Data Effective Date is “07/01/2026”.

Step 1 of 2: Person Data

Person Details

Names

+

| Format Type | Effective Date | Display Name | Formal Name |
|-------------|----------------|--------------|-------------|
| English     | 07/01/2026     | JANE DOE     | JANE DOE    |
| CURRENT     |                |              |             |

>

**Note:** In this example, the Job Data Record Effective Date of Hire is 07/01/2026. The Job Data Record Effective Date must occur on or later than the date of the Personal Data Effective Date.

Job Details

JANE DOE

| 0 | Safety Compliance Officer

18100 | DEPT OF LABOR AND INDUSTRY | Active

Effective Date

07/01/2026

Sequence

0

Action

Hire

Reason

New Hire

**Note:** In this example, the Benefit Program Participation Effective Date is 07/01/2026. The Benefit Program Participation Effective Date must occur on or later than the Job Data Record Effective Date of Hire.

Benefit Program Participation Details

1 row

Effective Date

07/01/2026

Benefit Program

SAL

Description

Salaried Employee Benefit Pgm

Currency Code

USD