

Completing a New Hire Overview

The Hire/Rehire Employee business process is applicable to both salary and wage employees.

This process is also used when transferring an employee from one agency to another. For further information on transferring employees, refer to the Job Aid titled **HR351_Completing an Inter-Agency Transfer**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Note: Before starting the new hire process, validate the position selected is the required position and all data related to the position is as expected. For further information on updating Position Data, see the Job Aid titled **HR351_Managing a Position and Job Change**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Link the employee to the Hire checklist as a guide through the COVA Hire tasks to complete. For further information on Cardinal Checklists see the Job Aid titled **HR351_Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Note: When entering personal data, there is an **Exclude Contact Information** checkbox. If this checkbox is checked the employee will NOT be included in the Active directory or employee directory extracts. (e. g. Undercover Officers)

Reminder: Before starting the new hire process validate a valid social security number is available to be entered into Cardinal as it is required to save the new hire transaction. For further information on assigning a Temporary Social Security Number Job Aid titled **Assigning and Updating Temporary Social Security Number**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Table of Contents

Add a New Hire.....	2
Add Citizenship Value to the Personal Information.....	23
Hiring a Person When Personal Data Exists in Cardinal	25
Run the Employee Activity Report.....	27

Add a New Hire

Before beginning, the applicable employee's SSN must be available for immediate reference. This process is performed to validate that the new employee is not currently in the Cardinal system, or if the employee is already in the system, to obtain the existing Employee ID.

1. Navigate to the **Add a Person** page using the following path to search for matching persons:

Navigator > Workforce Administration > Personal Information > Add a Person

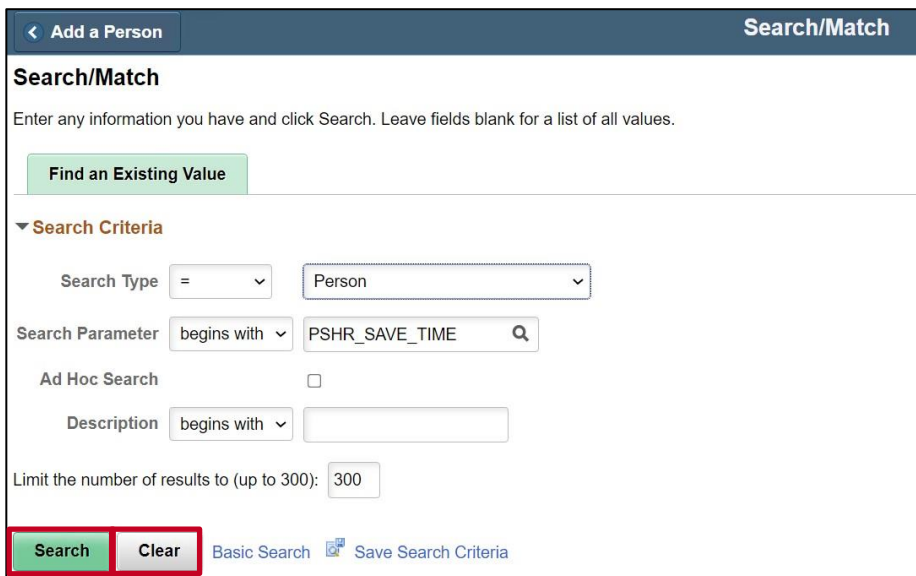
The **Add a Person** page displays.



The screenshot shows the 'Add a Person' page. At the top, there is a navigation bar with a back arrow, the title 'Add a Person', and links for 'New Window', 'Help', and 'Personalize Page'. Below the navigation bar, the page title 'Add a Person' is displayed. There is a 'Person ID' field containing the text 'NEW'. Below this field are two buttons: a green 'Add Person' button and a blue 'Search for Matching Persons' link, which is highlighted with a red rectangular box.

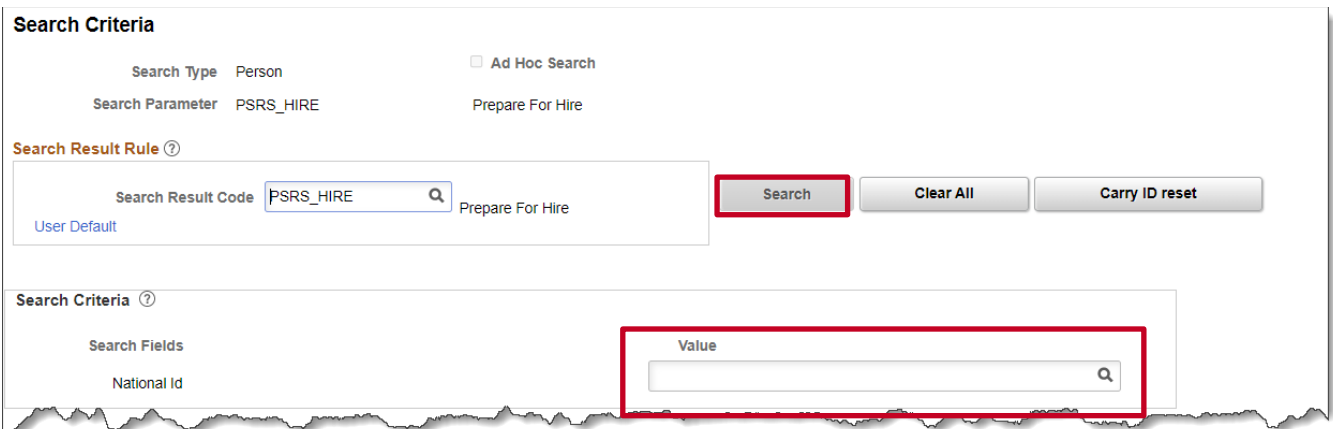
2. Click the **Search for Matching Persons** link.

The **Search/Match** page displays.



The screenshot shows the 'Search/Match' page. At the top, there is a navigation bar with a back arrow, the title 'Add a Person', and the page title 'Search/Match'. Below the navigation bar, the page title 'Search/Match' is displayed. There is a text box with the instruction 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a green 'Find an Existing Value' button. Underneath is a section titled 'Search Criteria' with a dropdown arrow. It contains three rows of search criteria: 'Search Type' with a dropdown set to '=' and a dropdown set to 'Person'; 'Search Parameter' with a dropdown set to 'begins with' and a text box containing 'PSHR_SAVE_TIME' and a search icon; and 'Ad Hoc Search' with a checkbox that is unchecked. Below these is a 'Description' row with a dropdown set to 'begins with' and an empty text box. At the bottom, there is a text box for 'Limit the number of results to (up to 300):' with the value '300' entered. At the very bottom, there are two buttons: a green 'Search' button and a red 'Clear' button, both highlighted with red rectangular boxes. To the right of these buttons are links for 'Basic Search' and 'Save Search Criteria'.

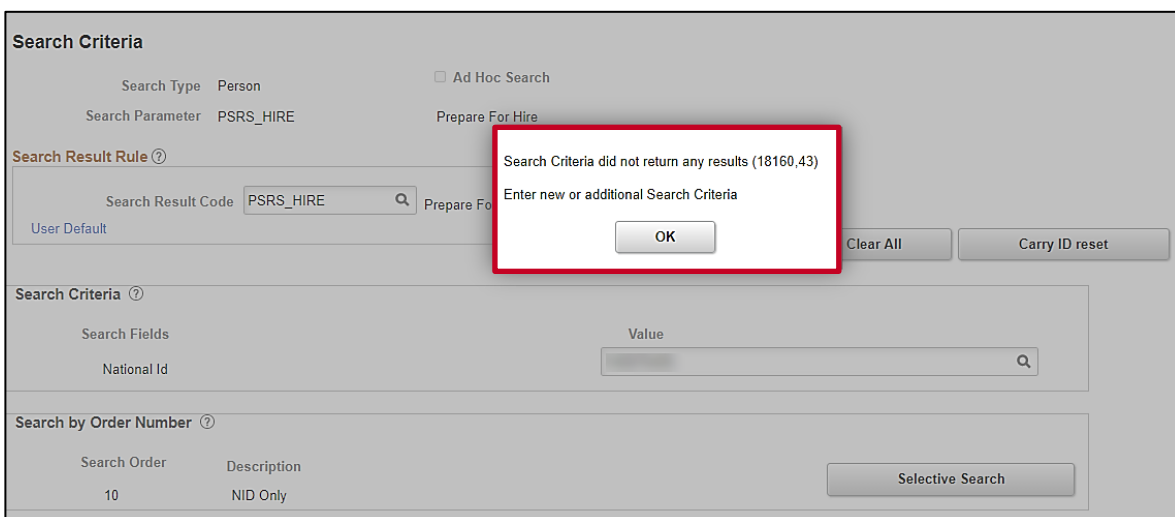
3. Click the **Clear** button.
4. Click the **Search** button.
5. The **Search Criteria** page displays.



6. Enter the employee's SSN into the **Value** field.
7. Press the **Tab** key on the keyboard to enable the **Search** button.
Note: The SSN is reformatted automatically (i.e., dashes are removed if they were entered).
8. Click the **Search** button.

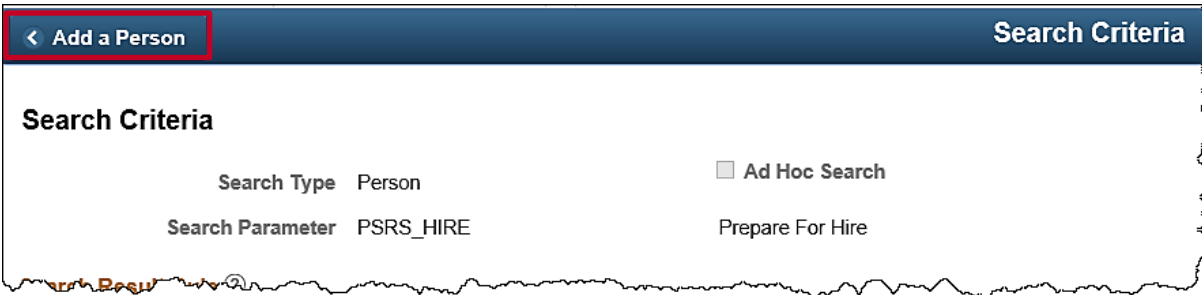
The **Search Criteria** page displays in a pop-up window.

Note: The message depicted below displays when the employee's SSN is not already in the Cardinal system. If the system displays an Employee ID, the employee already exists in the Cardinal system refer to **Hiring a Person When Personal Data Exists in Cardinal** section of this job aid. If the existing employee has employment history, a transfer or rehire should be completed as applicable. For further information on transferring existing employees, refer to the Job Aid titled **HR351_Completing an Inter-Agency Transfer**. For further information on rehiring employees, refer to the Job Aid titled **HR351_Completing a Rehire**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.



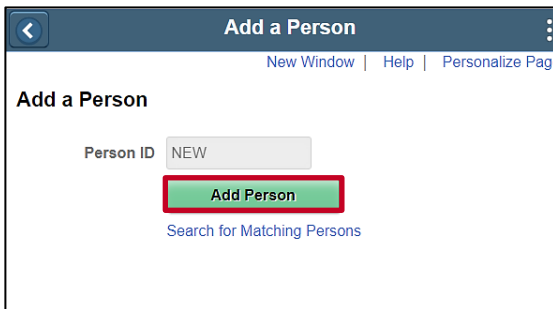
9. Click the **OK** button to close the pop-up window.

The **Search Criteria** page returns.



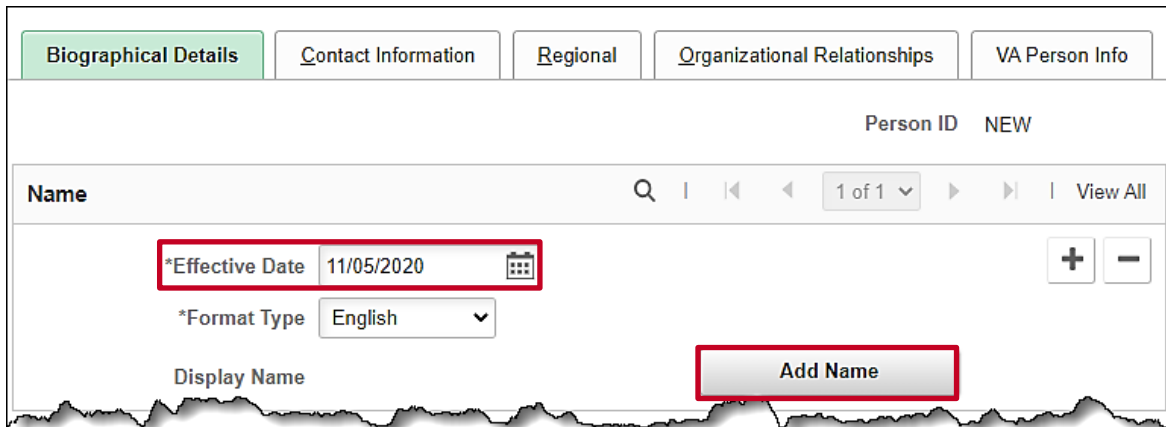
10. Click the **Add a Person** tab in the top left-hand corner of the page.

The **Add a Person** page returns.



11. Click the **Add Person** button.

The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

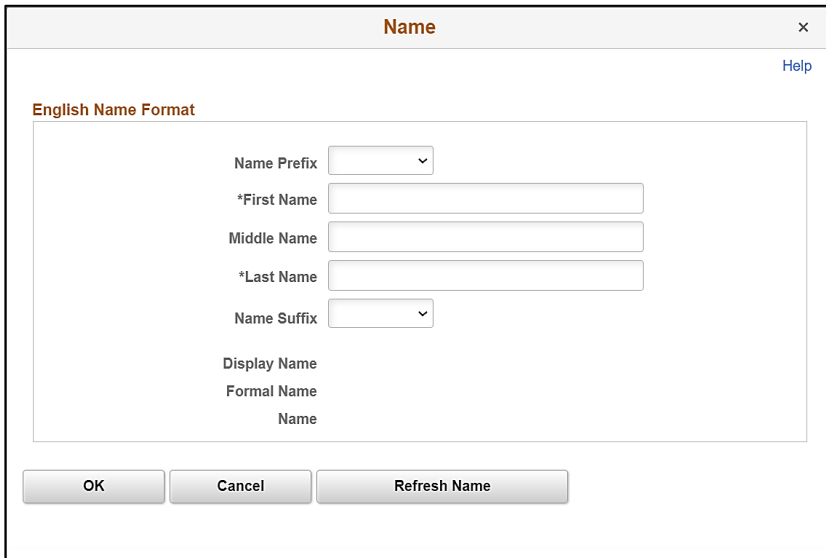


12. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

Note: The Effective Date cannot be greater than today's date when adding/modifying a person in Cardinal. **For further information on Effective Dating**, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in Job Aids under **Learning**.

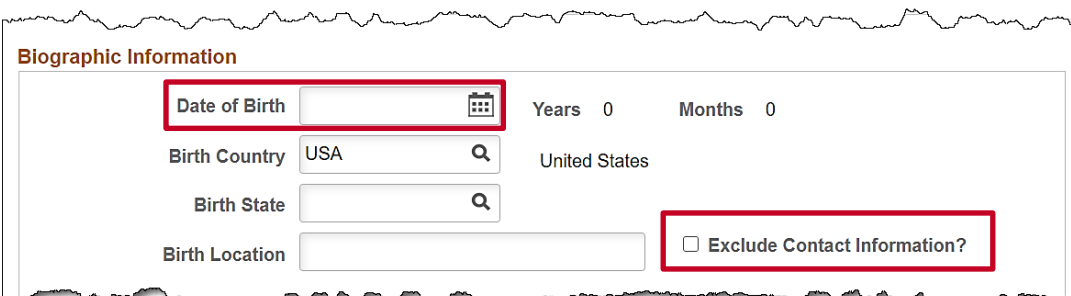
13. Click the **Add Name** button.

The **Name** page displays in a pop-up window.



14. Select the applicable prefix using the **Name Prefix** field dropdown button (optional).
15. Enter the employee's first name in the **First Name** field (required).
16. Enter the employee's middle name in the **Middle Name** field (optional).
Note: Please refrain from adding a period behind the middle initial.
17. Enter the employee's last name in the **Last Name** field (required).
Note: Please do not include suffixes like: Jr, Sr or IV in the **Last Name** field.
18. Select the applicable suffix using the **Name Suffix** field dropdown button (optional).
19. Click the **Refresh Name** button. The **Display Name**, **Formal Name**, and **Name** fields will auto-populate based on the information entered.
20. Click the **OK** button.

The **Modify a Person** page returns. Scroll down to the **Biographic Information** section as needed.

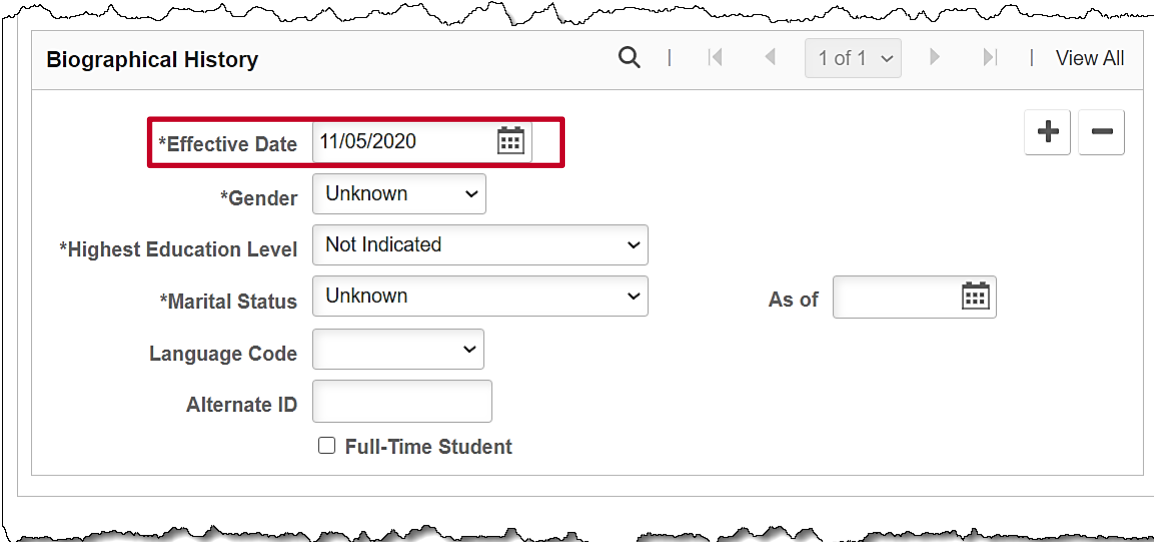


21. Select the employee's date of birth (required) using the **Date of Birth Calendar** icon.
22. The **Birth Country** field defaults to "USA". Update as needed using the **Look Up** icon.
23. Complete the **Birth State** and **Birth Location** fields (optional).

HR351 Completing a New Hire

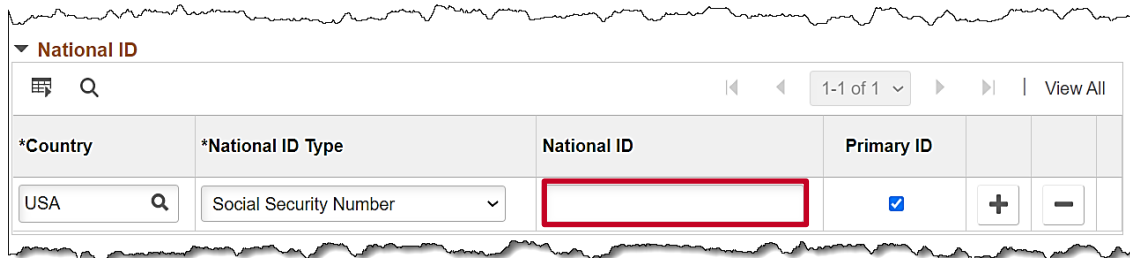
24. Click the **Exclude Contact Information** if employee information should NOT be sent to VITA in the Active Directory Extract or COV Employee Directory Extract (e. g. Undercover Officers).
25. Scroll down as needed to the **Biographical History** section.

The **Biographical History** section displays.



26. The **Effective Date** field within this section defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.
Note: For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
27. The **Gender** field is a required field for benefits purposes and defaults to “Unknown”. Select the legal gender of the employee using the dropdown button.
28. The **Highest Education Level** is a required field and defaults to “Not Indicated”. Select the employee’s highest level of education using the dropdown button.
29. The **Marital Status** is a required field for benefits purposes and defaults to “Unknown”. Select the legal marital status of the employee using the dropdown button.
30. Select the effective date for the employee’s marital status using the **As of Calendar** icon to the right of the **Marital Status** field.
31. The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
32. Scroll down as needed to the **National ID** section.

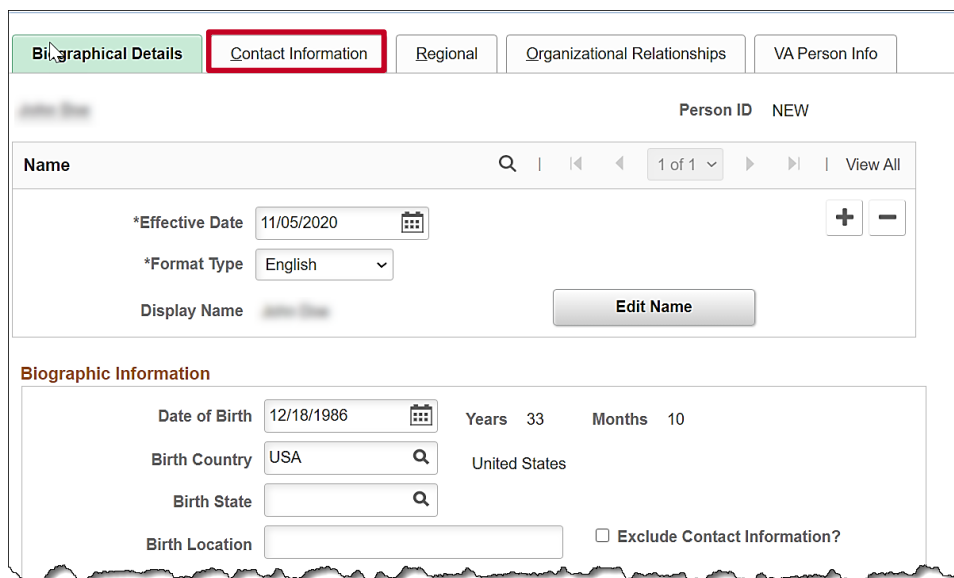
The **National ID** section displays.



*Country	*National ID Type	National ID	Primary ID
USA	Social Security Number		<input checked="" type="checkbox"/>

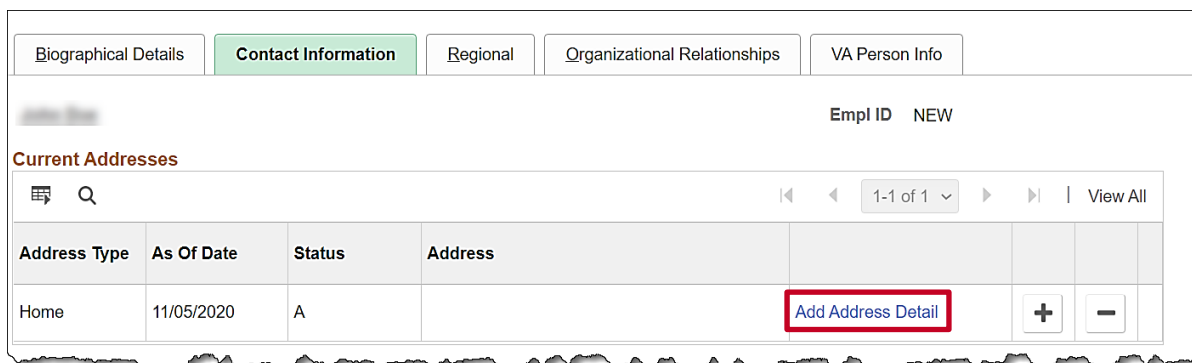
33. Enter the employee's Social Security Number (SSN) in the **National ID** field.

34. Scroll back up to the top of the page as needed.



35. Click the **Contact Information** tab.

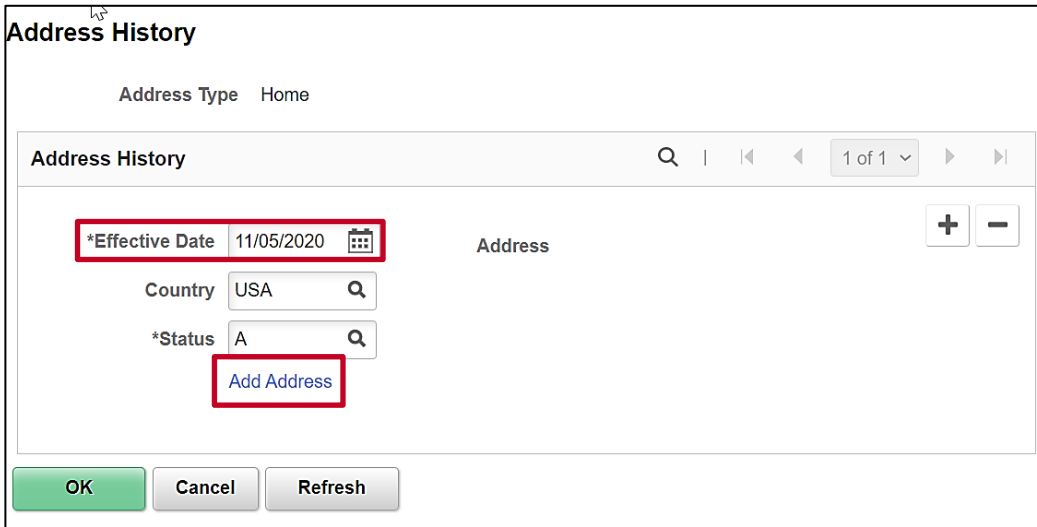
The **Contact Information** tab displays.



Address Type	As Of Date	Status	Address
Home	11/05/2020	A	

36. Click the Add **Address Detail** link.

The **Address History** page displays.




37. The **Effective Date** field within this section defaults to the current date. Update this date to the applicable date of the new hire using the **Effective Date Calendar** icon if required.

Note: For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

38. Click the **Add Address** link.

The **Edit Address** page displays.



39. Enter the employee's address information using the applicable fields.

Note: **Address 1**, **City**, **State** and **Postal** are required fields. The employee's personal data cannot be saved if either of these fields are blank.

40. Click the **OK** button.

The **Address History** page returns with the address information displayed.

Address History

Address Type Home

Address History 1 of 1

*Effective Date: 11/05/2020 Address: 101 Main Street
Richmond, VA 23234

Country: USA

*Status: A

[Add Address](#)

OK
Cancel
Refresh

41. Click the **OK** button.

The **Contact Information** tab returns.

Biographical Details
Contact Information
Regional
Organizational Relationships
VA Person Info

Empl ID NEW

Current Addresses

Address Type	As Of Date	Status	Address		
Home	11/05/2020	A	101 Main Street Richmond, VA 23234	Edit/View Address Detail	+ -

Phone Information

*Phone Type	Telephone	Extension	Preferred		
▼	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

42. Select the type of phone using the **Phone Type** field dropdown button.

43. Enter the applicable telephone number in the **Telephone** field.

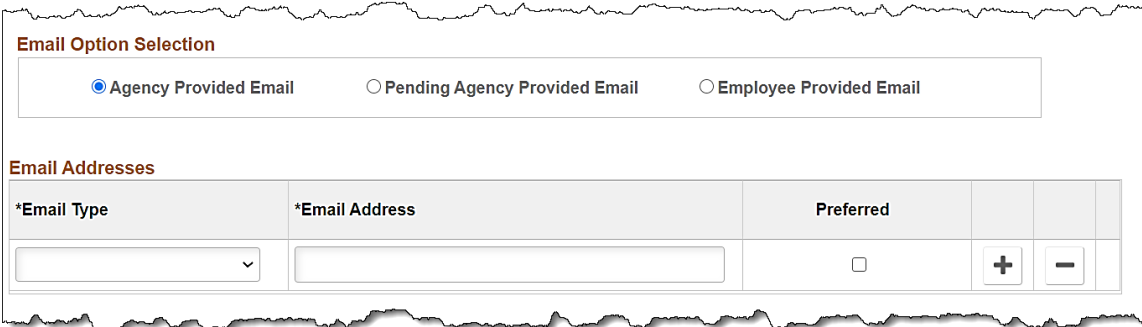
Note: It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.

44. Select the **Preferred** checkbox option if applicable.

45. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (+) and then repeat the previous three steps.

46. Scroll down as needed to the **Email Option Selection** and **Email Addresses** sections.

The **Email Option Selection** and **Email Addresses** sections display.



The screenshot shows two sections. The first section, titled "Email Option Selection", contains three radio buttons: "Agency Provided Email" (selected), "Pending Agency Provided Email", and "Employee Provided Email". The second section, titled "Email Addresses", is a table with columns for "*Email Type", "*Email Address", "Preferred", and two empty columns. The first row has a dropdown menu for email type, an input field for email address, a "Preferred" checkbox, and "+" and "-" buttons.

47. Complete these sections based on the following guidelines:

a. If the employee has been issued a business email:

- i. Accept the default email option of **Agency Provided Email**
- ii. Select an email type of "Business" using the **Email Type** field drop-down button
- iii. Enter the applicable email address in the **Email Address** field
- iv. Select the **Preferred** checkbox option

Note: If the employee is transferring into your agency be sure to update their business email address to the receiving agency email address.

b. If the employee's business email has been requested, but not yet assigned:

- i. Select the "Pending Agency Provided Email" email option by clicking the corresponding radio button option
- ii. Select an email type of "Business" using the **Email Type** field drop-down button
- iii. Enter "Noemail@virginia.gov" in the **Email Address** field

Note: Once the employee's business email is obtained, add a row to update this email address. If this is not updated, the employee will not be able to register for access to the Cardinal system.

iv. Select the **Preferred** checkbox option

c. If a business email will not be provided to the employee:

- i. Select the "Employee Provided Email" email option by clicking the corresponding radio button option
- ii. Select an email type of "Personal" using the **Email Type** field drop-down button
- iii. Enter the applicable email address in the **Email Address** field
- iv. Select the **Preferred** checkbox option

Note: The email entered must be provided to the employee as it will be needed to register and log into Cardinal HCM for the first time.

48. Scroll back up to the top of the page as needed.

Biographical Details
Contact Information
Regional
Organizational Relationships
VA Person Info

Empl ID NEW

Current Addresses

☰ Q
1-1 of 1
View All

Address Type	As Of Date	Status	Address			
Home	11/05/2020	A	101 Main Street Richmond, VA 23234	Edit/View Address Detail	+	-

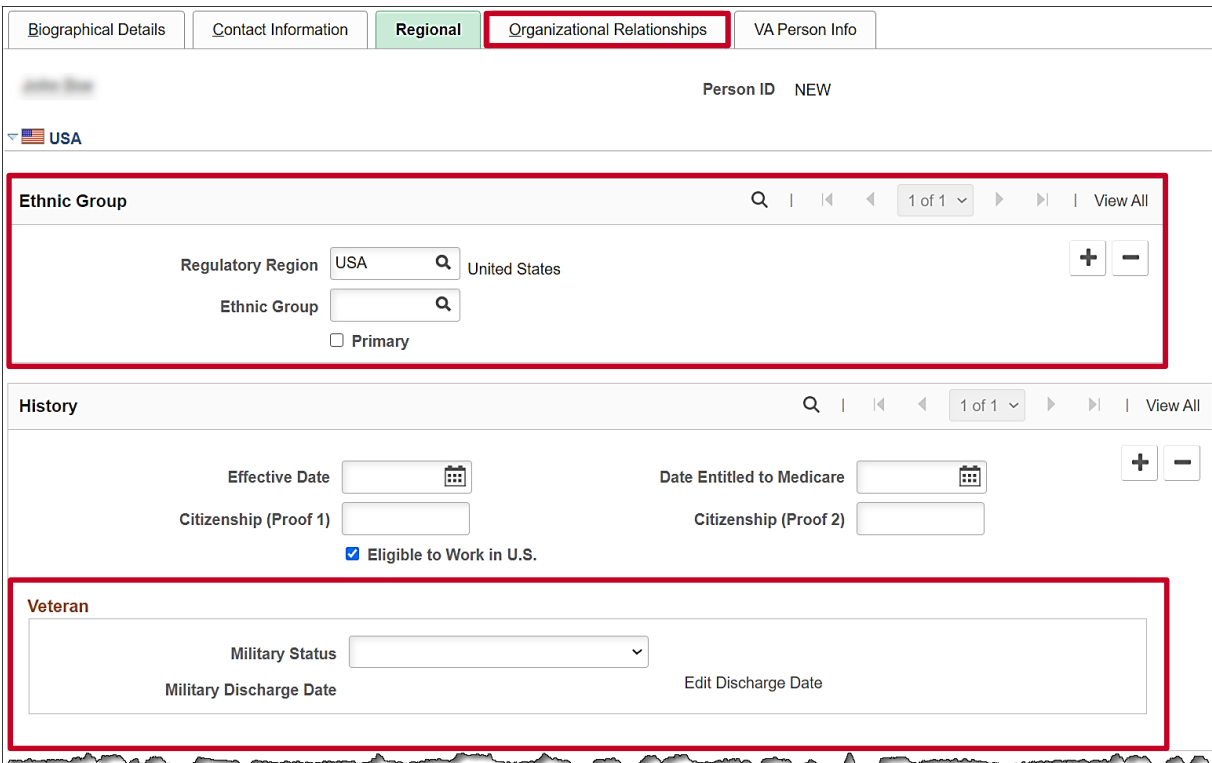
Phone Information

☰ Q
1-1 of 1
View All

*Phone Type	Telephone	Extension	Preferred		
Mobile	999/555-1111		<input checked="" type="checkbox"/>	+	-

49. Click the **Regional** tab.

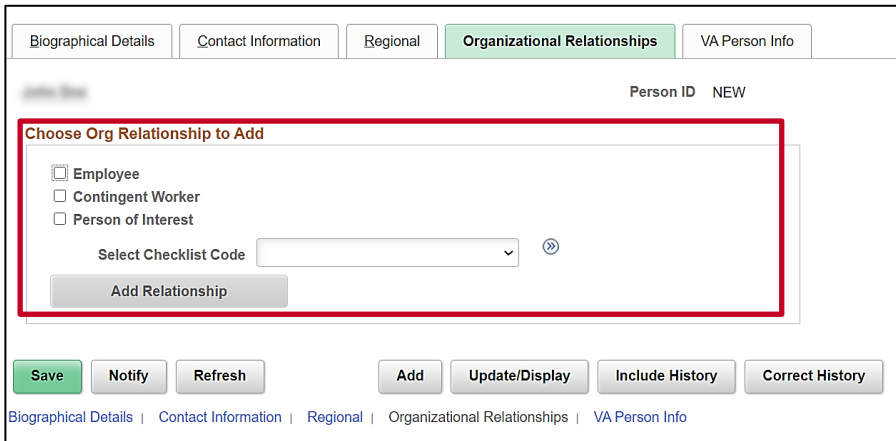
The **Regional** tab displays.



The screenshot shows the HR351 system interface with the **Regional** tab selected. The **Organizational Relationships** tab is highlighted with a red box. The **Ethnic Group** section is also highlighted with a red box and contains the following fields: **Regulatory Region** (USA), **Ethnic Group** (with a search icon), and a **Primary** checkbox. The **History** section is also highlighted with a red box and contains the following fields: **Effective Date**, **Date Entitled to Medicare**, **Citizenship (Proof 1)**, **Citizenship (Proof 2)**, and a checked **Eligible to Work in U.S.** checkbox. The **Veteran** section is highlighted with a red box and contains the following fields: **Military Status** (with a dropdown arrow), **Military Discharge Date**, and **Edit Discharge Date**.

50. Complete the **Ethnic Group** section (optional). The **Regulatory Region** field defaults to “USA”. Do not change.
51. Select the employee’s ethnic group using the **Ethnic Group Look Up** icon (optional).
Note: If the employee identifies with multiple ethnic groups, click the **Add a New Row** icon (+), and repeat this step.
52. If the employee provided the employee’s military status scroll down to select the appropriate military status using the **Military Status** drop down.
Note: Military Status is used to provide reporting information to Veteran’s Services.
53. The remaining sections on this tab are not currently being utilized in Cardinal. Click the **Organizational Relationships** tab.

The **Organizational Relationships** tab displays.



Biographical Details | Contact Information | Regional | **Organizational Relationships** | VA Person Info

Person ID NEW

Choose Org Relationship to Add

Employee
 Contingent Worker
 Person of Interest

Select Checklist Code

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info

54. Select the **Employee** checkbox option.

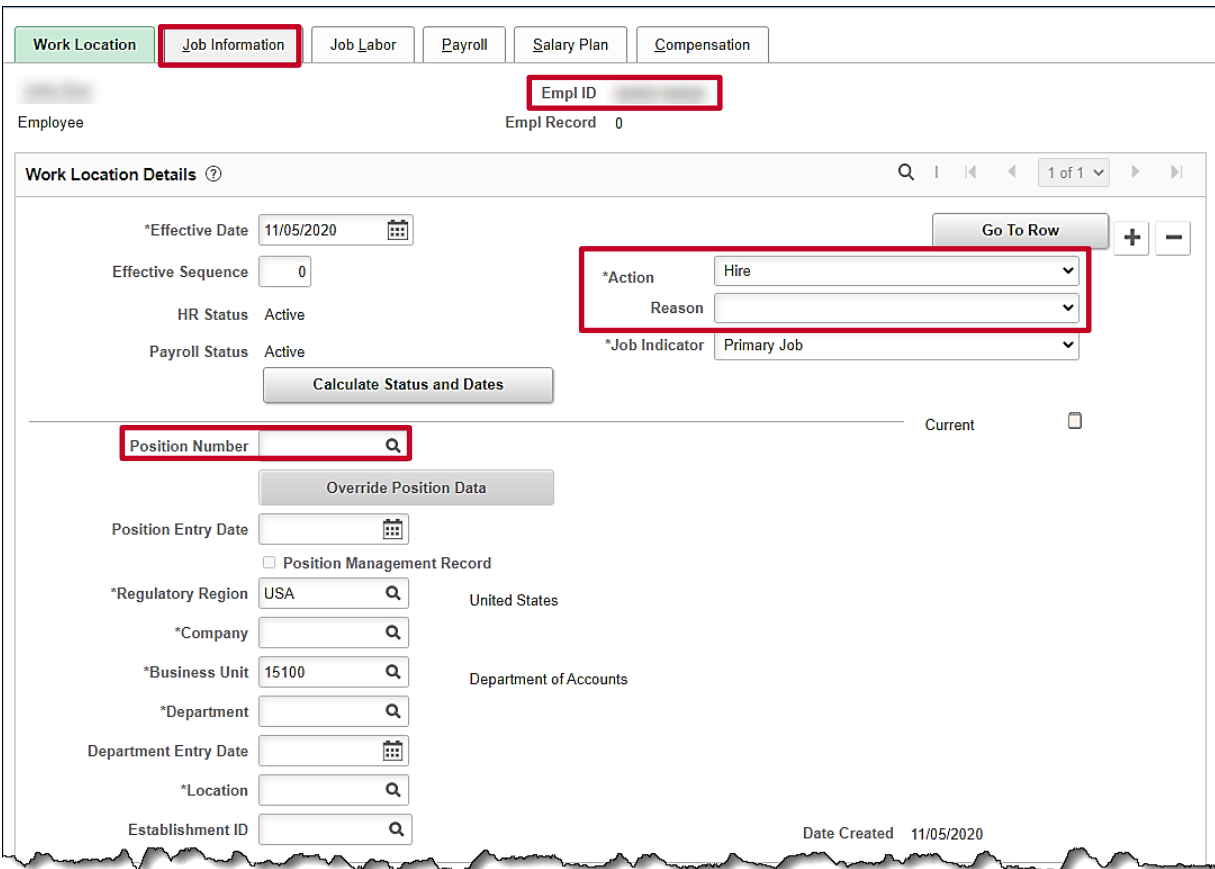
55. Verify that the **Select Checklist Code** field is set to "Hire". If "Hire" is not selected, select it from the dropdown list.

56. Click the **Add Relationship** button.

Note: The Cardinal system will auto assign the employee the next employee id number. It is located at the top of the Work Location page. In the screenshot below it is greyed out.

Note: The employee id assigned must be provided to the employee as it will be needed to register and log into Cardinal HCM for the first time.

The new employee's **Job Record** page displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The 'Job Information' sub-tab is highlighted in red. The 'Empl ID' field is highlighted in red. The 'Work Location Details' section includes the following fields:

- *Effective Date: 11/05/2020
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire
- Reason: (highlighted in red)
- *Job Indicator: Primary Job
- Position Number: (highlighted in red with search icon)
- Position Entry Date: (calendar icon)
- *Regulatory Region: USA (United States)
- *Company: (search icon)
- *Business Unit: 15100 (Department of Accounts)
- *Department: (search icon)
- Department Entry Date: (calendar icon)
- *Location: (search icon)
- Establishment ID: (search icon)
- Date Created: 11/05/2020

57. The **Effective Date** field defaults to the date entered on the **Personal Information** page. This is a required field. Validate that this date is the first date of employment for the employee (correcting if necessary) prior to saving the job record. A help desk ticket request is required to adjust the new employee's effective date after their job record is created and saved.

Note: For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

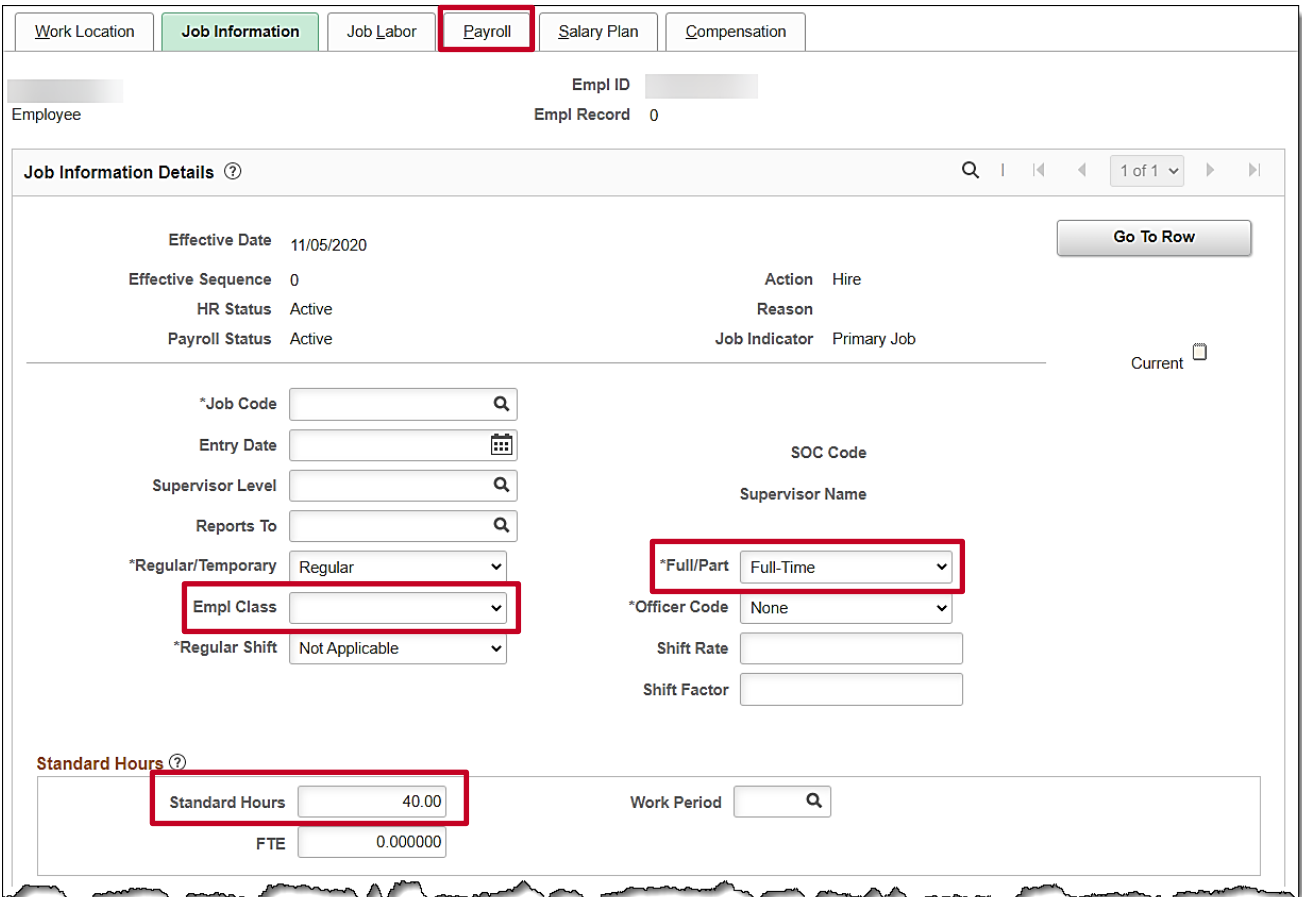
58. The **Action** field defaults to "Hire" and no other selections are available.

59. Select "New Hire" in the **Reason** field using the dropdown button.

60. Select the applicable position for the employee using the **Position Number Look Up** icon.

61. Click the **Job Information** tab.

The **Job Information** tab displays.



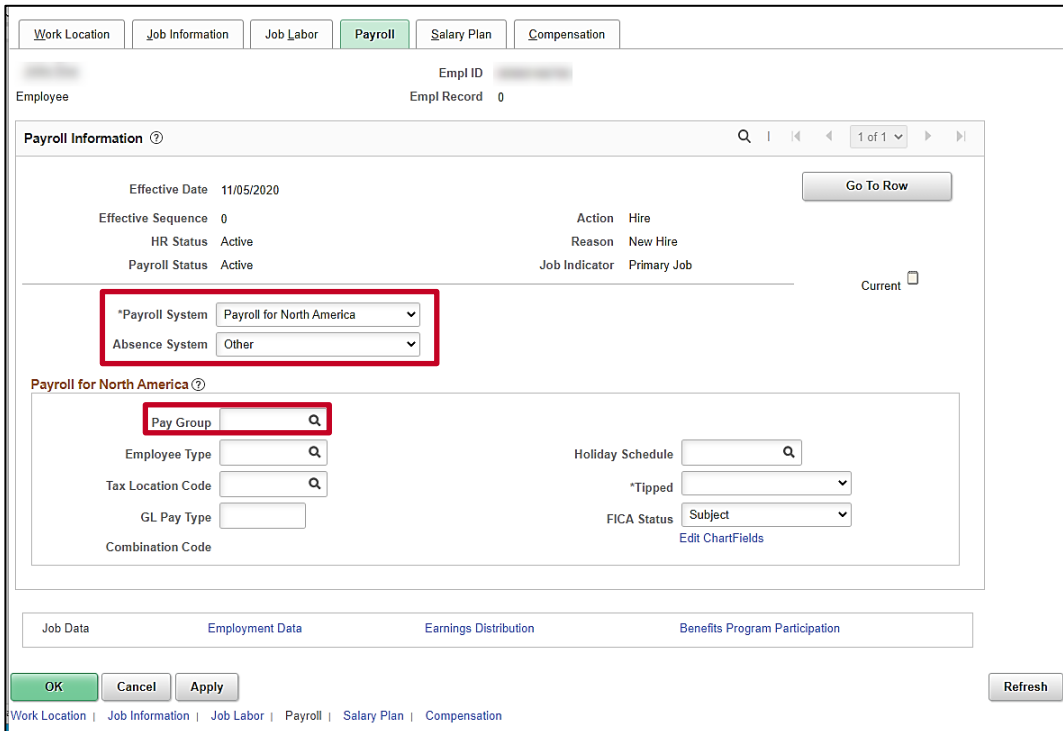
The screenshot shows the 'Job Information Details' section of the HR351 system. The 'Payroll' tab is active. The form contains the following fields and values:

- Effective Date: 11/05/2020
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Job Code: [Searchable]
- Entry Date: [Calendar]
- Supervisor Level: [Searchable]
- Reports To: [Searchable]
- *Regular/Temporary: Regular
- Empl Class**: [Dropdown menu]
- *Regular Shift: Not Applicable
- SOC Code: [Searchable]
- Supervisor Name: [Searchable]
- *Full/Part**: Full-Time
- *Officer Code: None
- Shift Rate: [Text]
- Shift Factor: [Text]
- Standard Hours**: 40.00
- FTE: 0.000000
- Work Period: [Searchable]

62. Review the information within the **Job Information Details** section. These values are populated when the Position is entered on the **Work Location** page.
63. Select the applicable employee class using the **Empl Class** field dropdown button. This is a required field.
64. The **Officer Code** field defaults to “None”. Do not change.
65. The **Full/Part** field defaults to **Full-Time**. If the position is **Part Time** or **Quasi**, select the appropriate option from the drop-down menu.
66. If the position is Part Time or Quasi, update the **Standard Hours** field with the appropriate hours (e.g., 30, 31, 32, etc.)

Note: The FTE field will auto-populate after you tab out of the **Standard Hours** field.
67. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

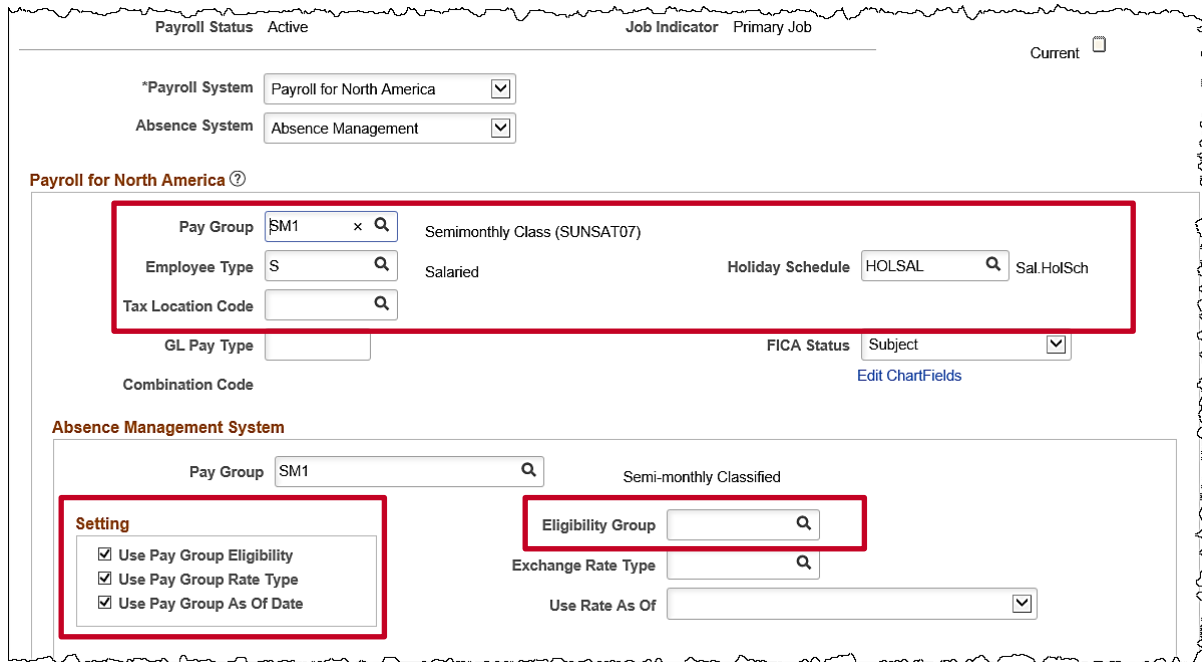
The **Payroll** tab displays.



68. The **Payroll System** field defaults to “Payroll for North America”. Do not change.
69. The **Absence System** field defaults to “Other”. If the new employee’s Agency uses the Cardinal Absence System, select “Absence Management” from the corresponding dropdown list. If the new employee’s Agency uses any absence management system besides the Cardinal Absence System, verify “Other” is selected in the **Absence System** field.
70. Select the applicable Pay Group using the **Pay Group Look Up** icon within the **Payroll for North America** section.

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

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

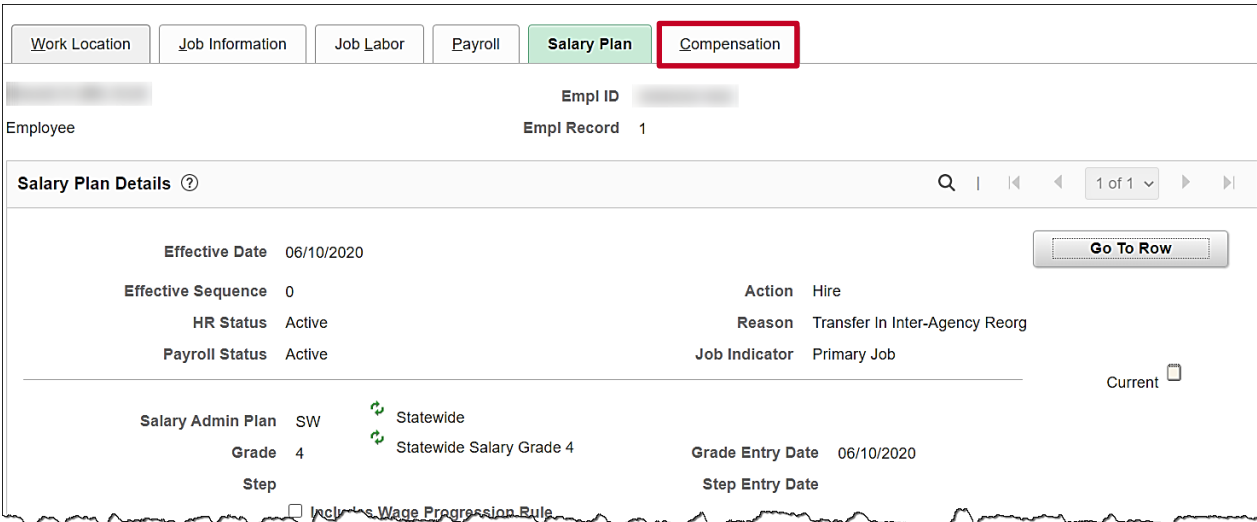


The screenshot shows a web form with the following sections:

- Payroll for North America**:
 - *Payroll System: Payroll for North America
 - Absence System: Absence Management
 - Pay Group: SM1 (highlighted with a red box)
 - Employee Type: S (highlighted with a red box)
 - Holiday Schedule: HOLSAL (highlighted with a red box)
 - Tax Location Code: (empty)
 - GL Pay Type: (empty)
 - FICA Status: Subject
 - Combination Code: (empty)
- Absence Management System**:
 - Pay Group: SM1
 - Setting (highlighted with a red box):
 - Use Pay Group Eligibility
 - Use Pay Group Rate Type
 - Use Pay Group As Of Date
 - Eligibility Group (highlighted with a red box): (empty)
 - Exchange Rate Type: (empty)
 - Use Rate As Of: (empty)

71. The **Employee Type** and **Holiday Schedule** fields default based on the Pay Group selection. If “**Absence Management**” is selected, the **Absence Management System Pay Group** field auto-populates based on the North America Pay Group entered/selected.
72. Select the applicable Tax Location Code based on the location of the office using the **Tax Location Code Look Up** icon.
73. The **Use Pay Group Eligibility** check box defaults as checked. Uncheck this box.
74. Select the applicable Eligibility Group using the **Eligibility Group Look Up** icon.
75. Scroll up as needed and click the **Salary Plan** tab.

The **Salary Plan** tab displays.



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

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

Salary Plan Details ?

Effective Date: 06/10/2020 Go To Row

Effective Sequence: 0 Action: Hire

HR Status: Active Reason: Transfer In Inter-Agency Reorg

Payroll Status: Active Job Indicator: Primary Job

Salary Admin Plan: SW Statewide

Grade: 4 Statewide Salary Grade 4 Grade Entry Date: 06/10/2020

Step: Step Entry Date: Includes Wage Progression Rule:

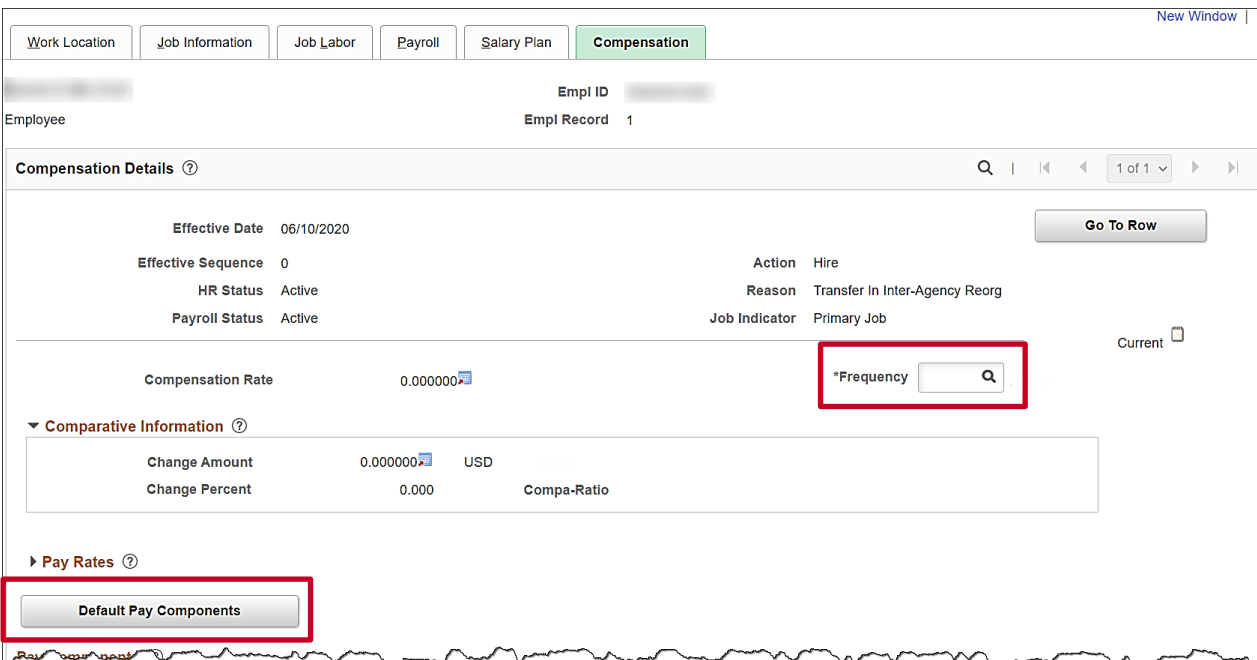
Current

76. Review the Salary Plan information.

Note: If the salary plan information is incorrect, cancel the action and make corrections to the Position before assigning the employee to the position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion. For further information on updating Position Data, see the Job Aid titled **HR351_Managing a Position and Job Change**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

77. If the Salary Plan information is correct, click the **Compensation** tab.

The **Compensation** tab displays.



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

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

Compensation Details ?

Effective Date: 06/10/2020 Go To Row

Effective Sequence: 0 Action: Hire

HR Status: Active Reason: Transfer In Inter-Agency Reorg

Payroll Status: Active Job Indicator: Primary Job

Compensation Rate: 0.000000 *Frequency

▼ **Comparative Information** ?

Change Amount	0.000000 <input type="text"/>	USD
Change Percent	0.000	Compa-Ratio

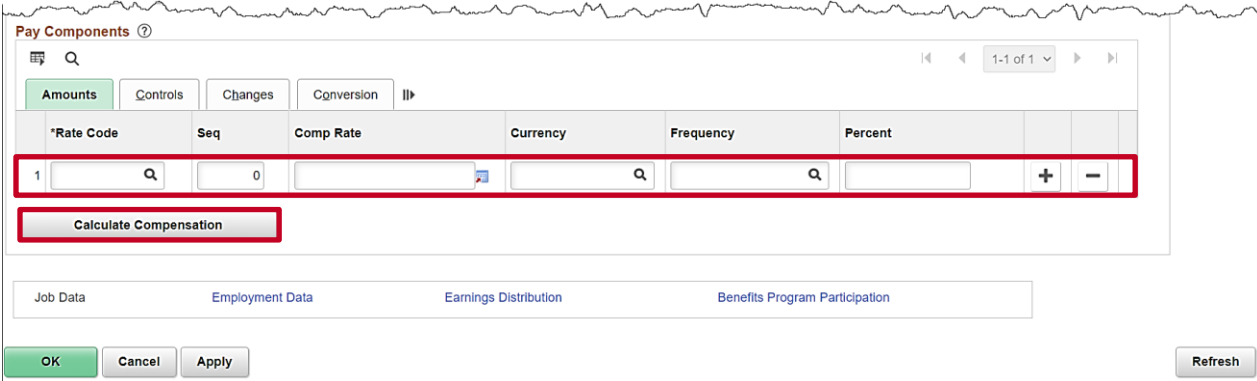
► **Pay Rates** ?

Default Pay Components

78. Select the applicable Frequency Code using the **Frequency Code Look Up** icon.

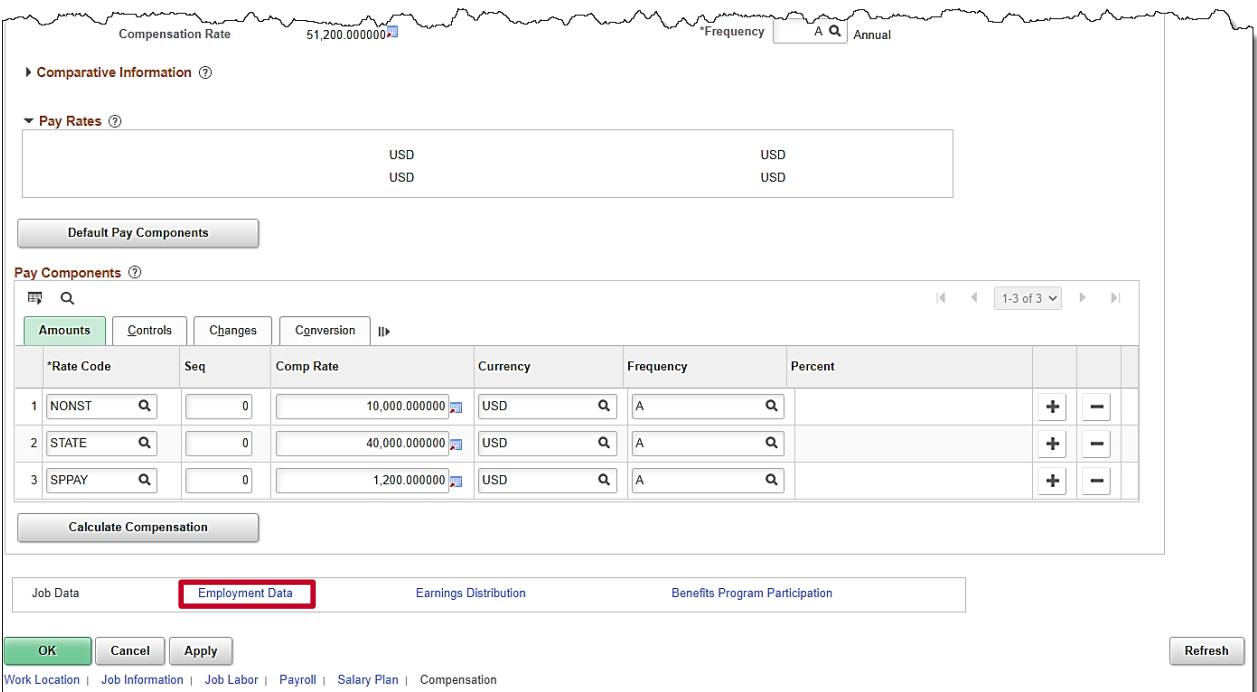
79. Click the **Default Pay Components** button.
80. Scroll down to the **Pay Components** section.

The **Pay Components** section displays.



81. Select the applicable Rate Code using the **Rate Code Look Up** icon.
82. The **Currency** and **Frequency** fields default based on the Rate Code entered/selected.
83. Click the **Add a New Row** icon (+) as required to enter multiple Rate Codes. Repeat the previous steps until all applicable Rate Codes are entered/selected.
84. Click the **Calculate Compensation** button.

The **Compensation** tab refreshes.



85. Click the **Employment Data** link.

The **Employment Information** page displays.

Employee
Empl ID [redacted]
Empl Record 0

Organizational Instance ⓘ

Organizational Instance Rcd 0	Original Start Date 11/10/2019	<input type="checkbox"/> Override
Last Start Date 05/06/2020	First Start Date 11/10/2019	
Termination Date 11/15/2020	Years Months Days	
Org Instance Service Date 11/10/2019	<input type="checkbox"/> Override	1 0 6

Organizational Assignment Data ⓘ

Instance Record

Last Assignment Start Date 05/06/2020	First Assignment Start 11/10/2019
Assignment End Date 11/15/2020	
Home/Host Classification Home	Years Months Days Time Reporter Data
Company Seniority Date 11/10/2019	<input type="checkbox"/> Override 1 0 6
Benefits Service Date 11/10/2019	<input type="checkbox"/> Override 1 0 6
Seniority Pay Calc Date 11/10/2019	<input type="checkbox"/> Override 1 0 6
Probation Date [calendar icon]	
Professional Experience Date [calendar icon]	Last Verification Date [calendar icon]
Business Title Security Officer III	Position Phone
*Work Mode [dropdown]	Tenure Status/Contract Type [dropdown]
Alternate Leave Plan [input] <input type="checkbox"/> Alternate Work Schedule	
VSDP Effective Date [calendar icon]	
Agency Use Field 1 [input]	Agency Use Field 2 [input] Agency Use Field 3 [input]

Person Employment Dates ⓘ

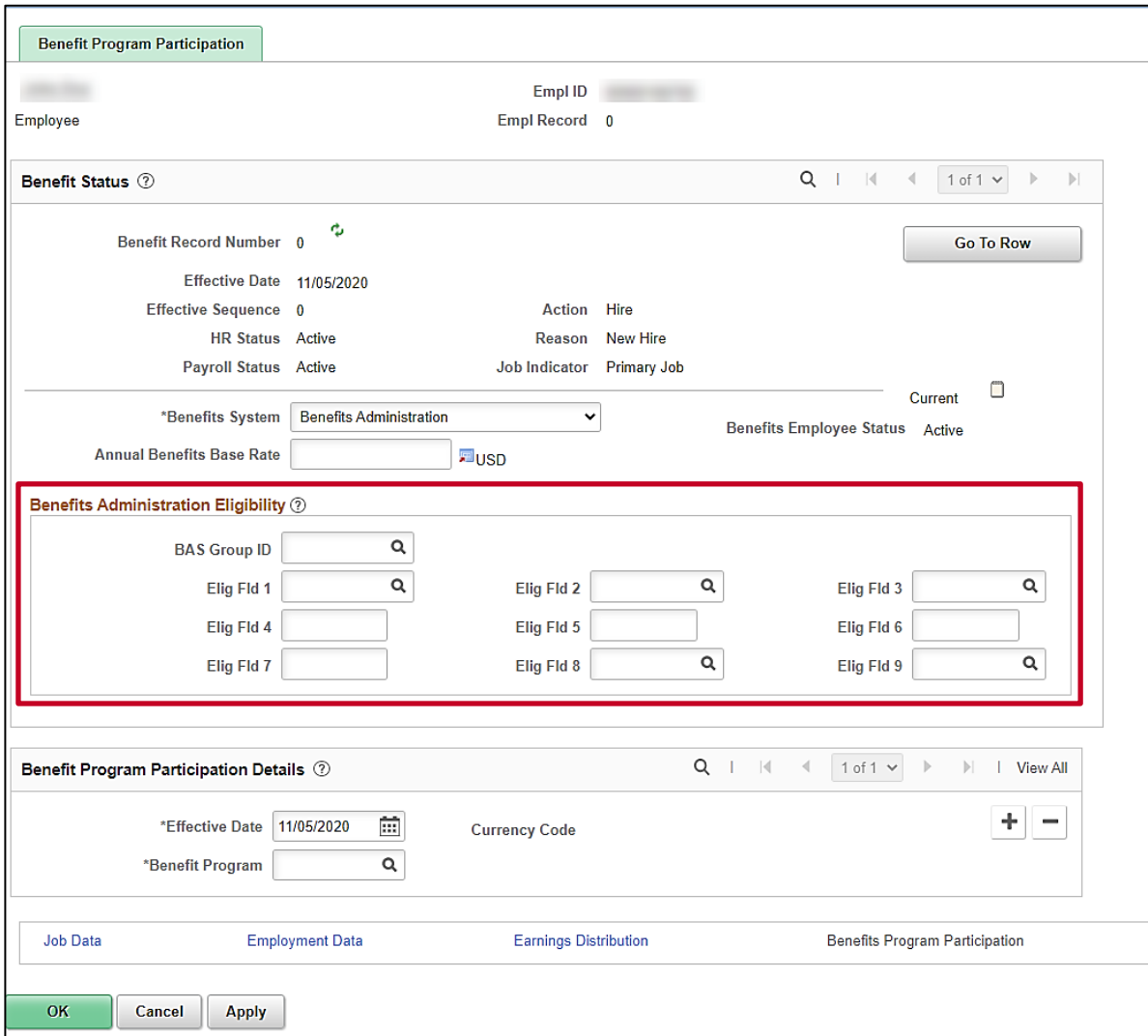
Continuous State Service Date	11/10/2019	[calendar icon]
Leave Eligibility Service Date	11/10/2019	[calendar icon]
Previous Months Of Service	[input]	

USA

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

86. Enter/select the **Probation Date** for a classified new hire employee only. This date is one year from the original hire date.
87. Enter/select the original hire date in the **Continuous State Service Date** field.
88. Enter/select the original hire date in the **Leave Eligibility Service Date** field.
89. Click the **Benefits Program Participation** link.

The **Benefits Program Participation** page displays.



Benefit Program Participation

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

Benefit Status (1 of 1)

Benefit Record Number: 0

Effective Date: 11/05/2020
Effective Sequence: 0
HR Status: Active
Payroll Status: Active

Action: Hire
Reason: New Hire
Job Indicator: Primary Job

*Benefits System: Benefits Administration
Benefits Employee Status: Active

Annual Benefits Base Rate: USD

Benefits Administration Eligibility

BAS Group ID:

Elig Fld 1: Elig Fld 2: Elig Fld 3:

Elig Fld 4: Elig Fld 5: Elig Fld 6:

Elig Fld 7: Elig Fld 8: Elig Fld 9:

Benefit Program Participation Details (1 of 1) | View All

*Effective Date: 11/05/2020 Currency Code:

*Benefit Program:

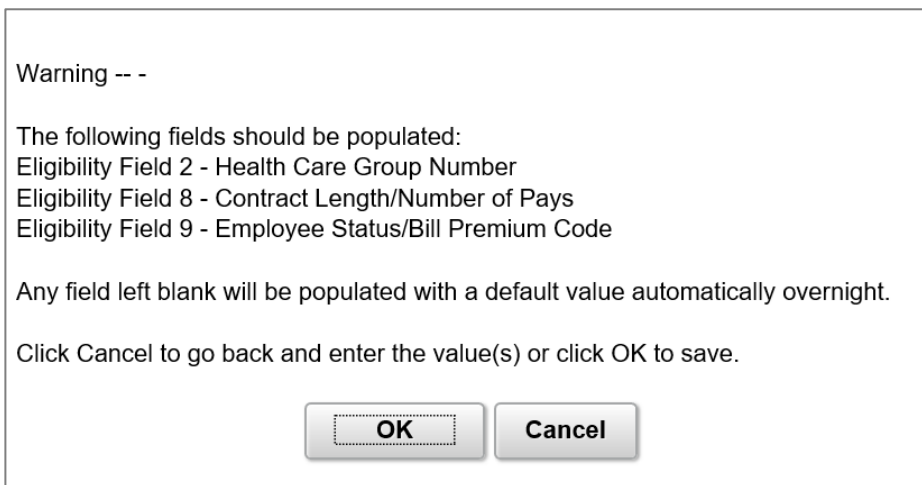
Job Data | Employment Data | Earnings Distribution | **Benefits Program Participation**

90. The **Elig Fld 1** field is updated when the VRS VNAV Upload runs monthly after the employee selects benefits. The field is updated manually **ONLY** when the upload creates an error for the employee. No data entry is required unless correcting the error.
91. Click the **Elig Fld 2 Look Up** icon and select the applicable Healthcare Group ID (Department value). These values are provided to the health benefit vendors and reflect the group in which the employee is enrolled (DHRM provided 9-digit number). This is a required field, and the user will receive an error message if it is not filled in with a valid value.
92. Click the **Elig Fld 3 Look Up** icon and make the applicable selection based on who will be entering time for the employee.
93. The **Elig Fld 6** (free form text) field is updated when the VRS VNAV Upload runs monthly after the employee selects benefits. The field is updated manually **ONLY** when the upload creates an error for the employee. No data entry is required unless correcting the error.

94. Click the **Elig Fld 8 Look Up** icon and select the applicable pay sheet value (i. e., 12 - 24). This is a required field, and the user will receive an error message if it is not filled in with a valid value.
95. Click the **Elig Fld 9 Look Up** icon. These values represent the nature of the employee and how the employee health premiums are paid. Select the breakdown of how the benefits payment will be split between the employee (EE) and the employer (ER). This is a required field, and the user will receive an error message if it is not filled in with a valid value.

Note: For further information on eligibility configuration valid values, refer to the Job Aid titled **BN361_Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Note: Before clicking the **OK** button, review all Job Information. Once the **OK** button is clicked, the record is saved, and anything entered incorrectly will require a help desk ticket for correction. If any of the following fields are blank, a warning message will display: **Elig Flds 2, 8, & 9**.



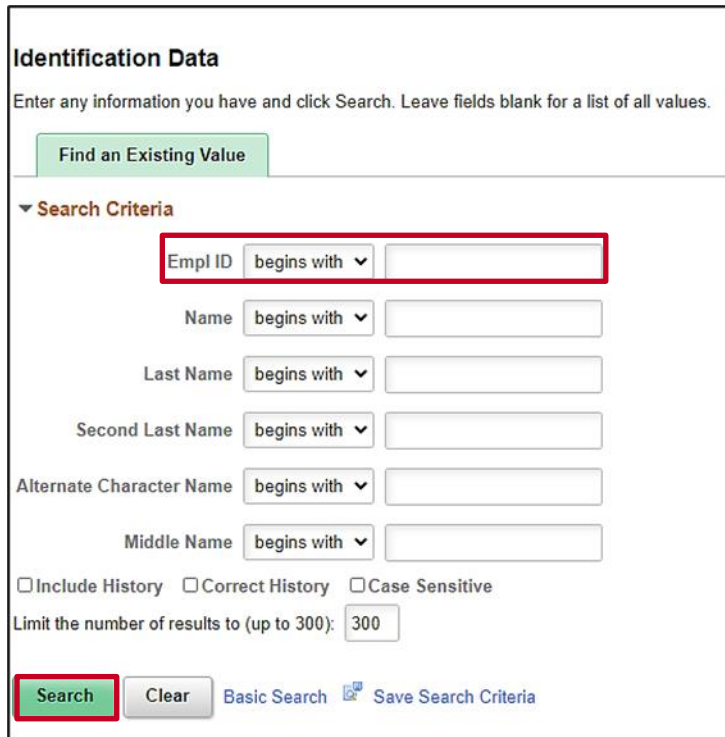
96. Click the **OK** button.
97. To continue the new hire process, navigate to the **Identification Data** page. This is required to ensure that all extracts will successfully complete. Continue to the **Add Citizenship Value to the Personal Information** section of this Job Aid.

Add Citizenship Value to the Personal Information

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

Navigator > Workforce Administration > Personal Information > Citizenship > Identification Data

The **Identification Data Search** page displays.



Identification 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

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

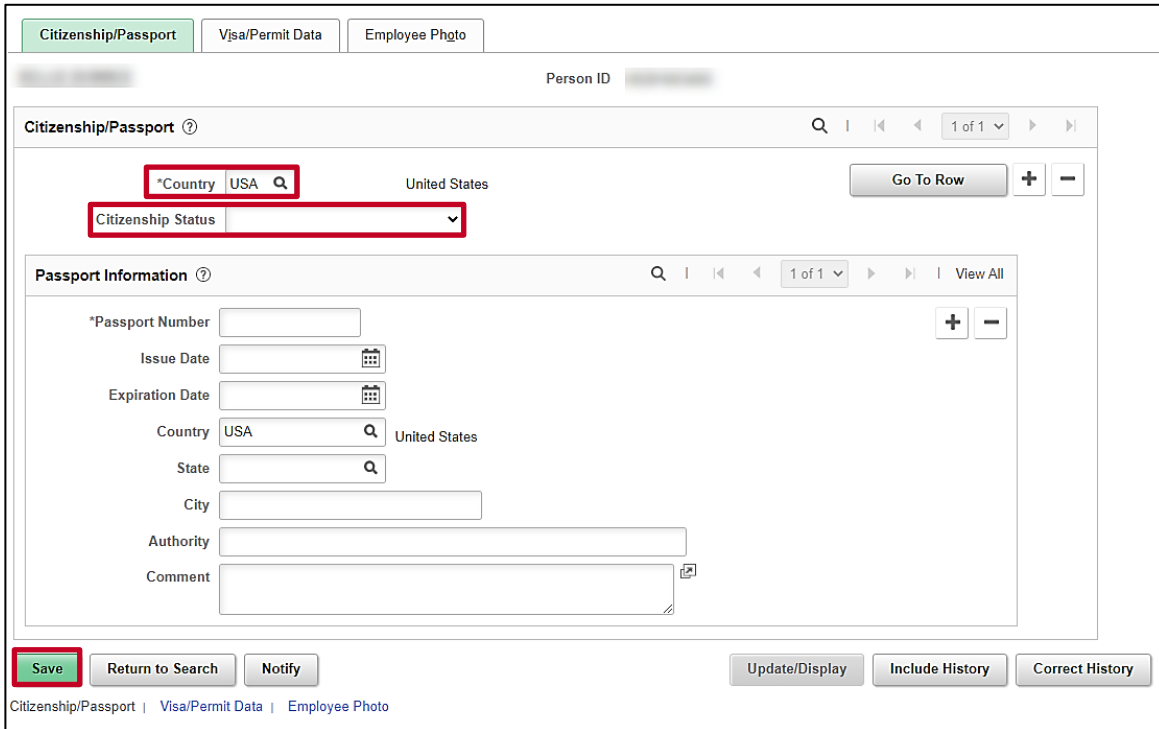
Include History Correct History Case Sensitive

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

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

2. Enter the applicable Employee Id in the **Empl ID** field.
3. Click the **Search Button**.

The **Identification Data** page displays with the **Citizenship/Passport** tab displayed by default.



The screenshot shows the 'Identification Data' page with the 'Citizenship/Passport' tab selected. The page displays the following fields and controls:

- Citizenship/Passport** (tab)
- Person ID** (text field)
- Citizenship/Passport** (table header)
- *Country** (text field with dropdown arrow, value: USA)
- Citizenship Status** (dropdown menu)
- Passport Information** (table header)
- *Passport Number** (text field)
- Issue Date** (calendar icon)
- Expiration Date** (calendar icon)
- Country** (text field with dropdown arrow, value: USA)
- State** (text field with dropdown arrow)
- City** (text field)
- Authority** (text field)
- Comment** (text area)
- Save** (button)
- Return to Search** (button)
- Notify** (button)
- Update/Display** (button)
- Include History** (button)
- Correct History** (button)

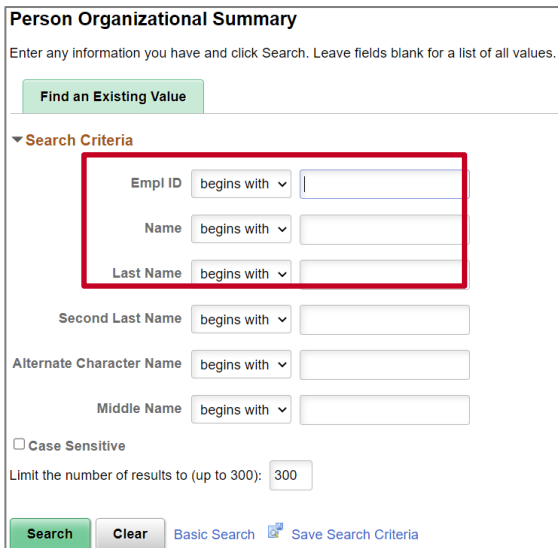
4. Click the **Country** drop down. Select **“USA”**. This field must always be USA as this field references the country of employment.
5. Select the employee’s citizenship status using the **Citizenship Status** field drop-down button. If citizenship status is unknown at the time of hire, select the option of **Not Indicated**. **Do not leave this field blank.**
Note: For additional information on the Citizenship Information, see the Job Aid titled **HR351_Maintaining Employee Citizenship Information** job aid. This Job Aid can be found on the on the Cardinal website in **Job Aids** under **Learning**.
6. Click the **Save** button.
7. Continue to the **“Run the Employee Activity Report”** section of this Job Aid.

Hiring a Person When Personal Data Exists in Cardinal

There are times when only personal data exists in Cardinal for a person. When this is the case, the person must be hired by using their employee id and adding a new employment instance.

1. Navigate to the **Person Organizational Summary** page using the following path to search for the person:

Navigator > Workforce Administration > Personal Information > Person Organizational Summary



The screenshot shows the 'Person Organizational Summary' search interface. It includes a 'Find an Existing Value' button, a 'Search Criteria' section with dropdown menus for 'Empl ID', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown. There is also a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300):' field set to 300. At the bottom are 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria' buttons.

The **Person Organizational Summary** page displays.

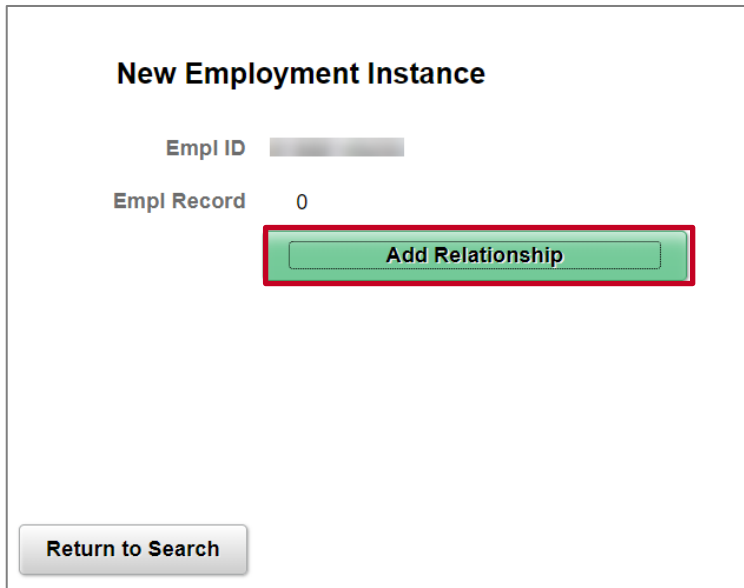
2. Enter any known search criteria and click the **Search** button.



The screenshot shows the 'Person Organizational Summary' page. It features a 'Person ID' field highlighted with a red box. Below the field are 'Return to Search' and 'Notify' buttons.

3. Copy the employee ID from the **Person ID** field.
4. Navigate to the **Add Employment Instance** page using the following path:

Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance



New Employment Instance

Empl ID [REDACTED]

Empl Record 0

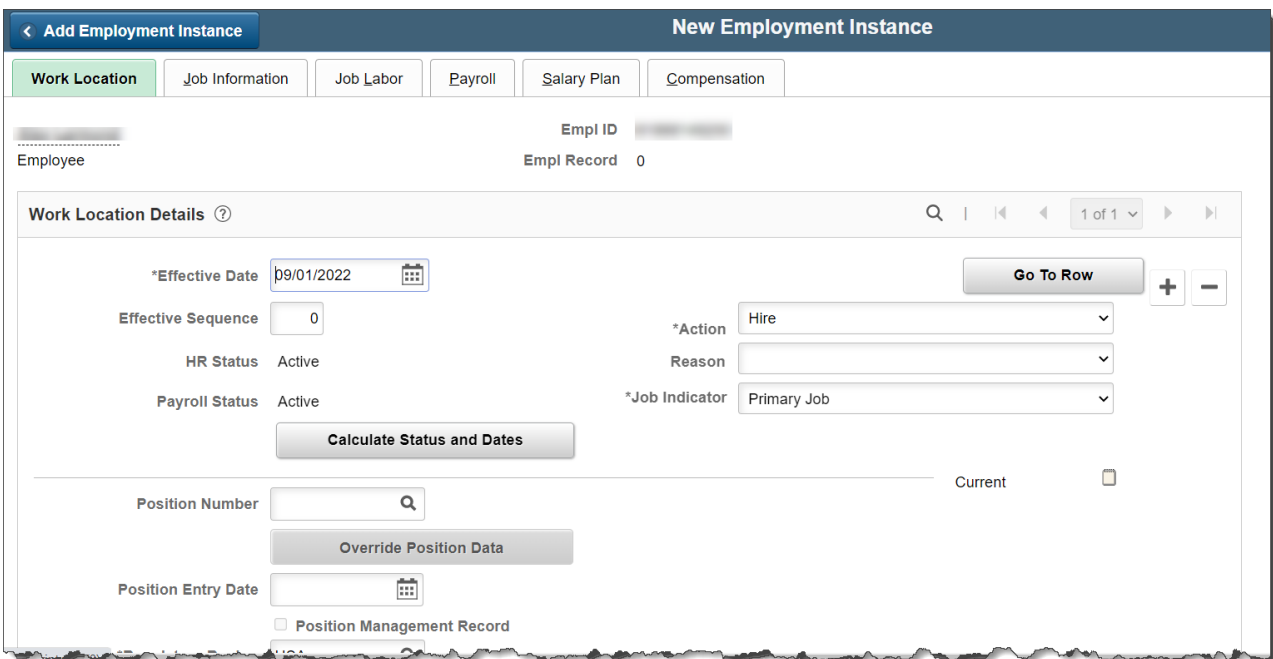
Add Relationship

Return to Search

The **New Employment Instance** page displays.

Note: Validate that the correct **Empl ID** and **Empl Record** number are displayed. For a brand new hire, the employee record should be **Empl Record 0**.

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



Add Employment Instance **New Employment Instance**

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

Employee [REDACTED] Empl ID [REDACTED] Empl Record 0

Work Location Details ?

*Effective Date 09/01/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Hire

Reason

*Job Indicator Primary Job

Go To Row + -

Calculate Status and Dates

Position Number

Override Position Data

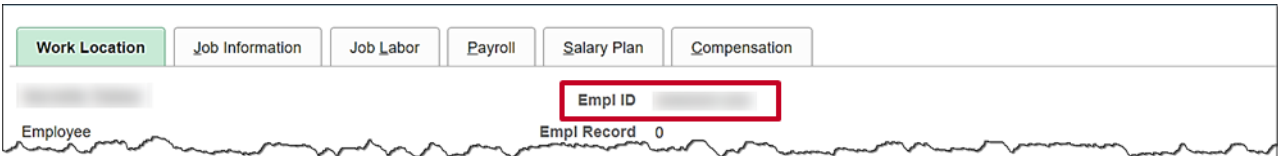
Position Entry Date

Position Management Record

Current

The **New Employment Instance** page displays job data.

6. Proceed to step 57 in the **Add a New Hire** section to complete the job data pages for this new hire.

Run the Employee Activity Report

The screenshot shows a web interface with a horizontal menu of tabs: Work Location (highlighted in green), Job Information, Job Labor, Payroll, Salary Plan, and Compensation. Below the tabs, there is a search or filter area with a red box highlighting the 'Empl ID' field. Below this, the text 'Employee' and 'Empl Record 0' are visible.

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