

HUMAN CAPITAL MANAGEMENT

New Features in Human Resources

August 27, 2026



Agenda

01

Welcome & Cardinal Upgrade Overview

02

New HR Tiles

03

HR Enhancements

04

Live Demonstration

05

Wrap-up

Welcome to Today's Webinar!

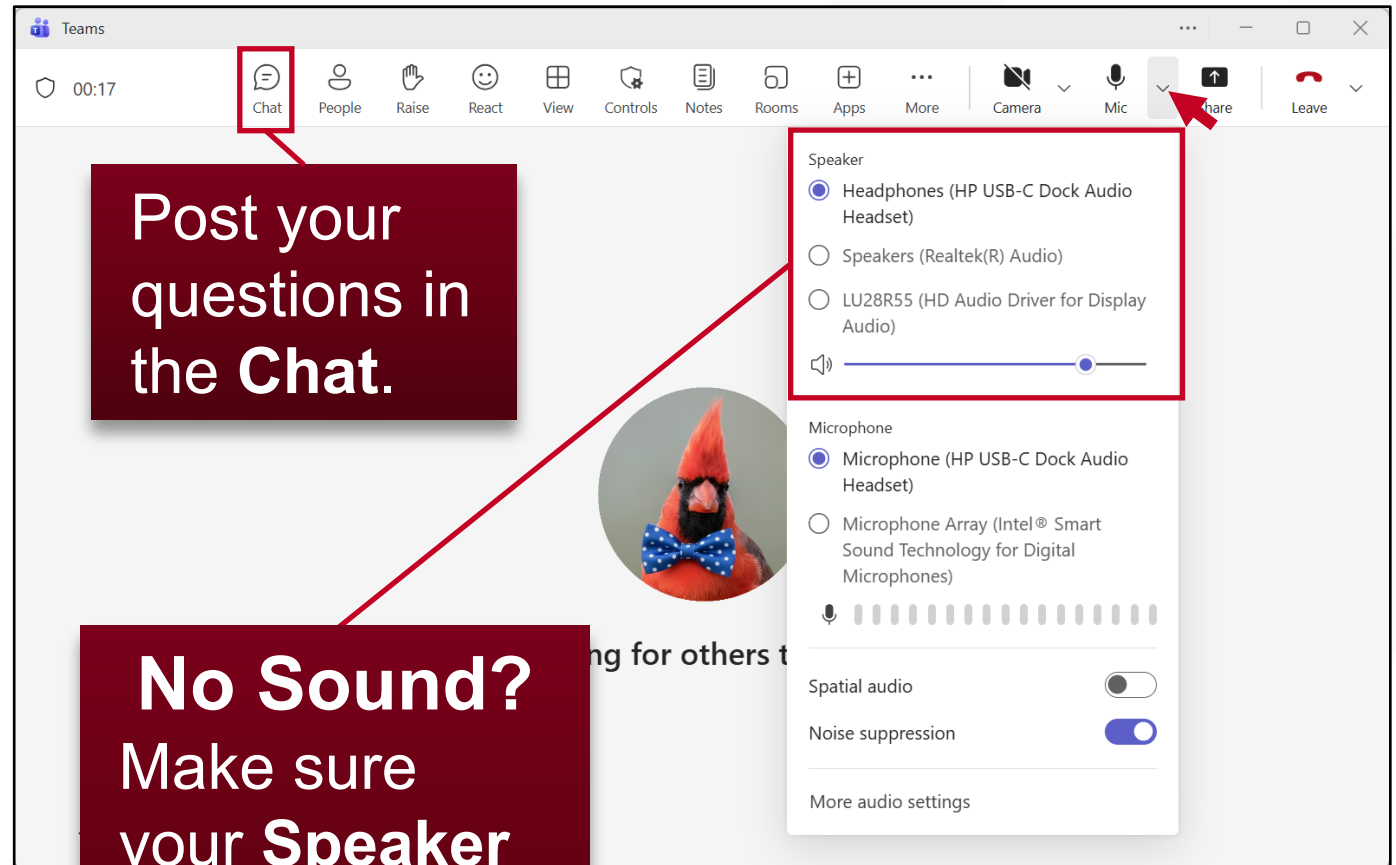
Q&A Format

Post your questions in the Chat.
While we may not answer every question during today's session, all inquiries will be captured for follow-up.

Agency-Specific Questions

Will **not** be addressed today – please open a ticket instead.

All attendees have been muted.

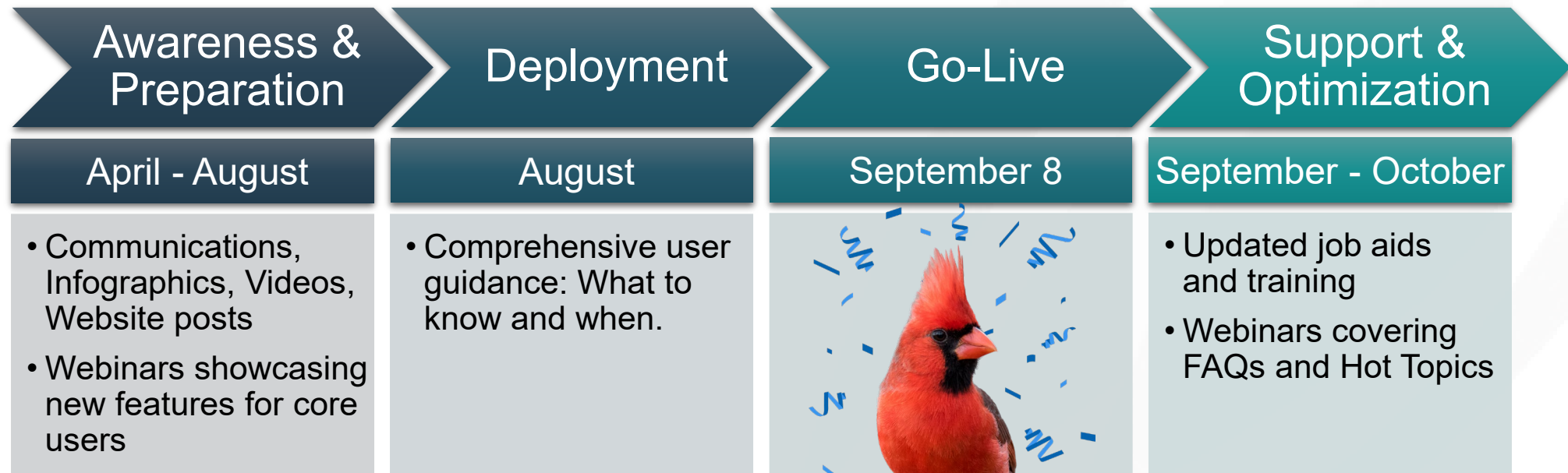


What to Expect in This Webinar

- ✓ This session highlights new features and changes in the Cardinal Upgrade. It is an informational overview, not a formal training class.
- ✓ If we have not discussed a particular Cardinal function in today's webinar, it is likely unchanged as part of the upgrade.
- ✓ Agency users will not have access to a training environment to preview the upgraded system.
- ✓ All job aids, training, and support materials are being updated and will be made available before the upgrade.
- ✓ Retaking completed Cardinal training is **not required**.
- ✓ **This session is being recorded.** The recording will be made available shortly after the event.

What is the Cardinal Upgrade?

- The Cardinal team is enhancing the Financials (FIN) and Human Capital Management (HCM) applications.
- This upgrade will deliver a range of new features designed to improve system functionality and your overall user experience.
- Scheduled to go live on **September 8, 2026**.



Cardinal Upgrade: Impact on Your Favorites

As Cardinal transitions to a modern navigation experience, existing personalizations and favorites may be linked to pages or menu items that no longer exist. Please note the following impacts on your saved items:

- **Homepage Personalization and NavBar Favorites:** Automatically removed at go-live due to the new navigation structure.
 - A communication will go out to all users with instructions about re-creating favorites in the upgraded system.
- **Queries & Run Controls:** Existing favorite queries and Run Control IDs will remain intact—no action required.

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Live Demonstration

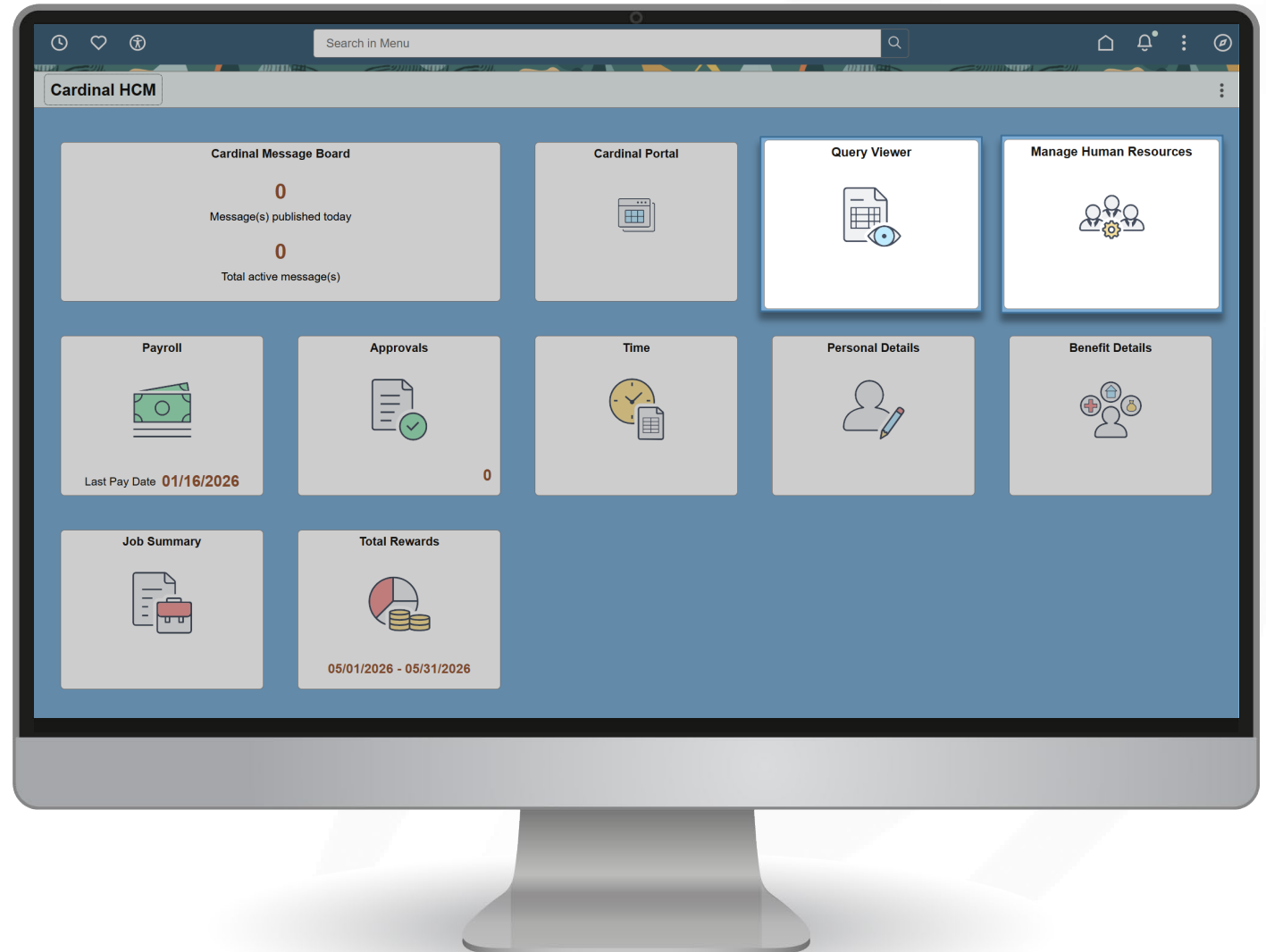
05

Wrap-up

Cardinal HCM Homepage – New HR Tiles

Query Viewer: Access the Query Viewer directly from the homepage.

Manage Human Resources: Access core HR tasks from the homepage.



Manage Human Resources

Manage Human Resources groups the following HR Tasks in a tile-based menu:

Create Employee

Modify Person

Manage Job

Add Jobs and
Assignments

Manage Position

Name Changes

Return From
Leave

Manage Human Resources

Create Employee



Modify Person



Manage Job



Add Jobs and Assignments



Manage Position



Name Changes

Empl ID	Name

Return From Leave

Empl ID	Name	Return
		2025-12-14
		2025-12-22
		2025-12-23

More...

Level Set – Human Resources Functionality

Core HR functionality and processes remain largely unchanged, with updates focused primarily on user experience and easier navigation.

Centralized Workspace: Core HR functions are now consolidated into the **Manage Human Resources** tile.

NavBar Access: Select HR activities remain accessible through the NavBar, including:

- Rewards and Recognition
- Disciplinary Actions
- Maintain Teleworkers
- Additional Pay
- Queries
- Reports
- Interfaces/Extracts

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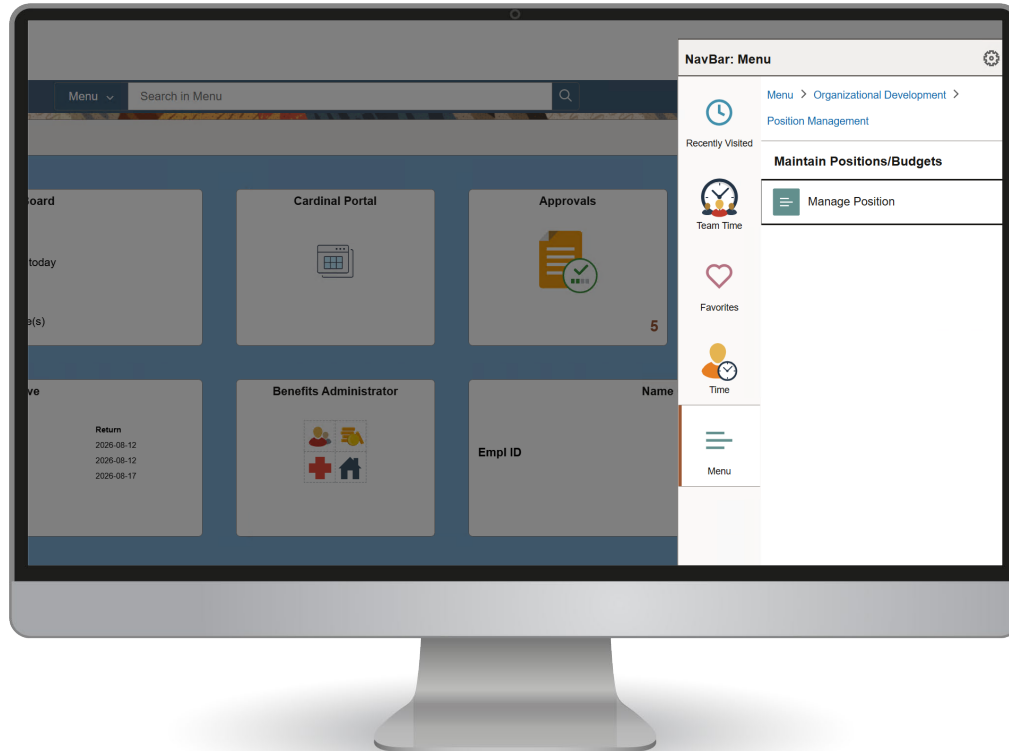
Live Demonstration

05

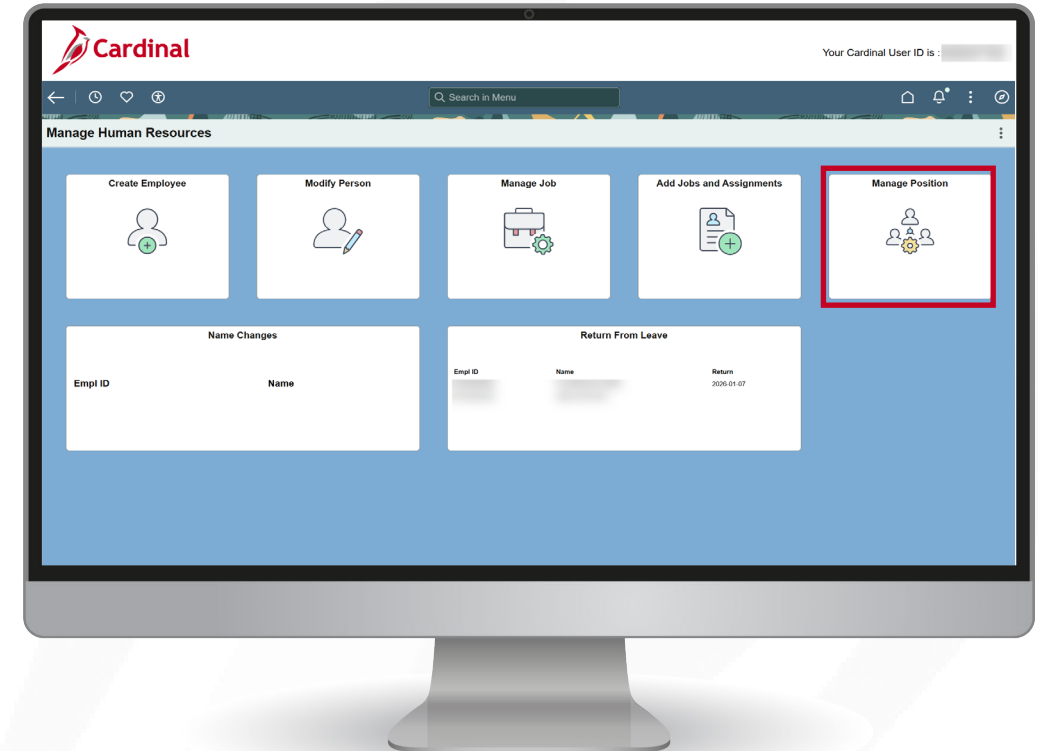
Wrap-up

Manage Position

The **Manage Position** tile replaces **NavBar > Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position**.



Current State



Future State

Manage Position

Manage Position is now a dedicated tile inside **Manage Human Resources**.

Key Enhancement: Users can save custom search criteria using any search field and quickly retrieve them from the **My Saved Searches** drop-down menu.

Manage/Create Position

Manage Position

+ Add New

▼ Search Criteria

My Saved Searches

▼

Position Number

begins with ▼

Description

begins with ▼

Business Unit

begins with ▼

Q

Department

begins with ▼

Q

Position Status

begins with ▼

▼

Reports To Position Number

begins with ▼

☐ Include History

Search

Clear

Save Search

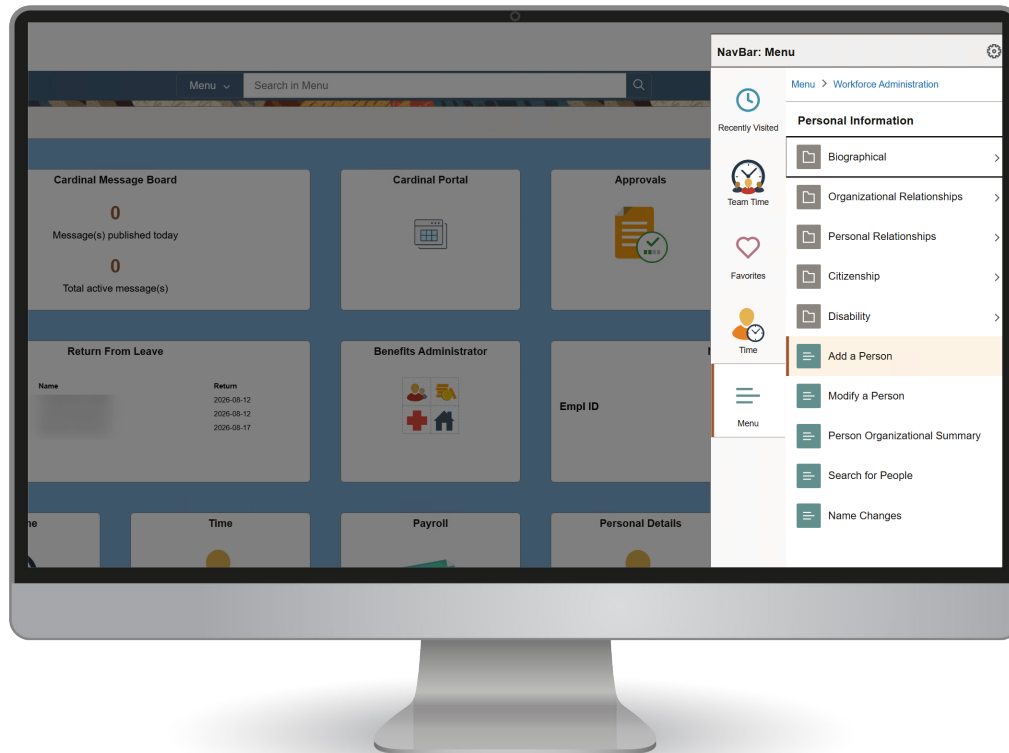
Basic Search

▼ My Recent Searches

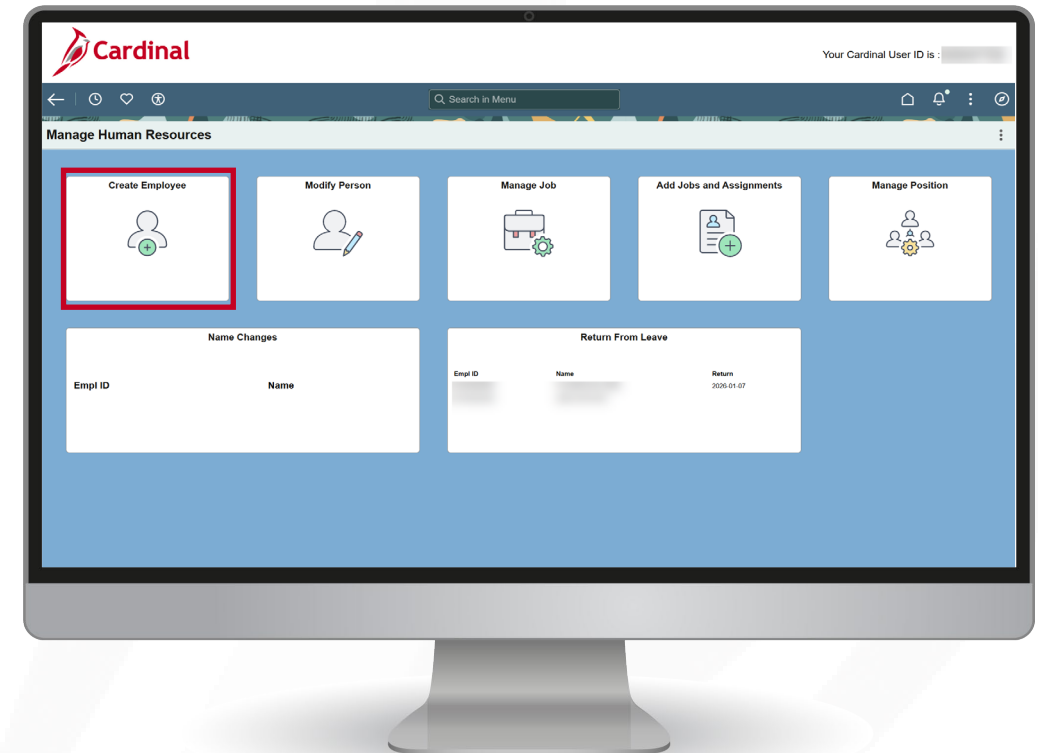
There are no recent searches to be displayed.

Create Employee

The **Create Employee** tile replaces **NavBar > Menu > Workforce Administration > Personal Information > Add a Person**.



Current State



Future State

Create Employee – Search Match

Search for Matching Persons is now fully integrated as the first step in the Create Employee process.

Search: Enter the employee's Social Security Number (SSN) to check for an existing record (SSN is required).

Create Employee

Personal Details

*National ID

First Name

Last Name

Search

Date of Birth

Middle Name

Create Employee – Person Data

If Search Match yields no existing record, the system automatically opens Person Data as Step 1.

- Required details are consolidated on a single page.
- Users can click sidebar tabs to jump directly to specific sections.
- Completing Person Data automatically advances the process to Job Data.

Create Employee

1 Person Data 2 Job Data 3 Summary [Next >](#)

Step 1 of 3: Person Data

Person Details

Name

*Effective Date

Format Type

Proposed

Name Prefix

*First Name

Middle Name

*Last Name

Name Suffix

[View Name](#)

Personal Information

*Date of Birth

Birth Country

United States

Birth Location

Exclude Contact Information? ☐

Biographical Details

If no data is entered, the default values will be saved upon selecting the Next button.

[Add Biographical Details](#)

Sidebar:

- Person Details
- Contact Information
- Regional
- Checklist
- VA Person Info
- Validation

Validation Section & Summary Page

The Validation section and Summary page are new features to help prevent errors before submitting and saving your work. They are available for Create Employee, Modify Person, and Manage Job.

- **Validation:** Provides warning or error messages for areas requiring attention or review.
- **Summary Page:** Gives a clear overview of every change made.

Validation

Validation Messages

☒ Proceed with warning

Validation Successful with warnings

3 rows

Message Severity	Message Text
1 Warning	Warning -- Head count of 4 exceeds maximum head count of 2 for position. (1000,156)
2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)
3 Warning	Warning -- You have updated job information that is relevant to compensation defaulting on job row 1. (1000,910)

Step 2 of 2: Summary

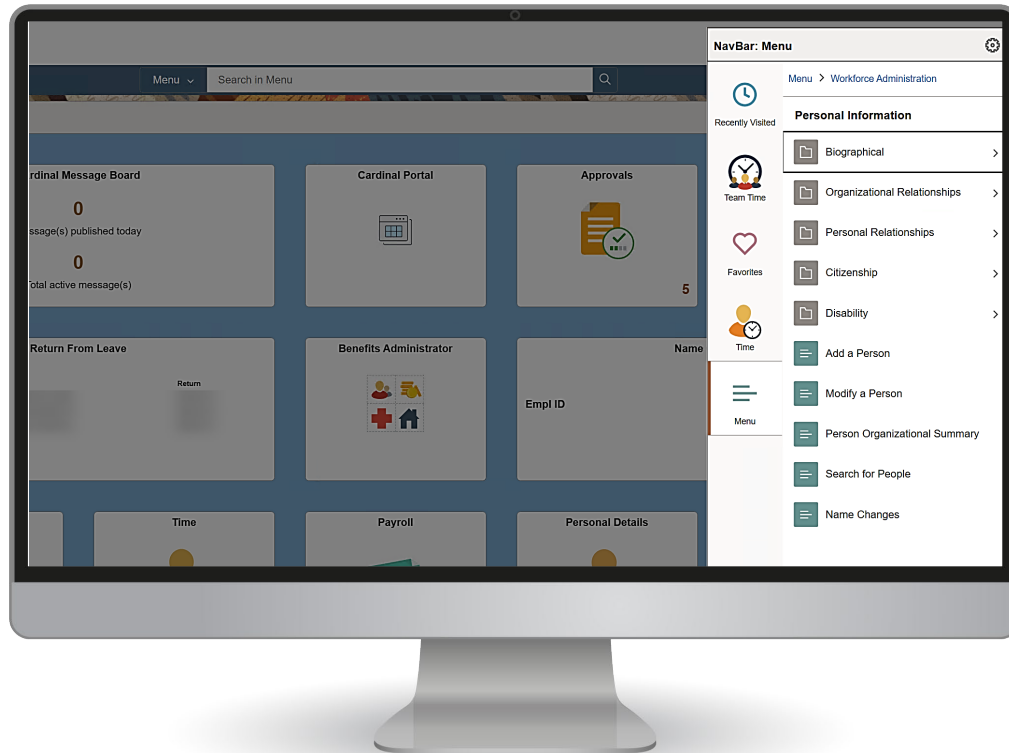
Summary of Changes

Job Data

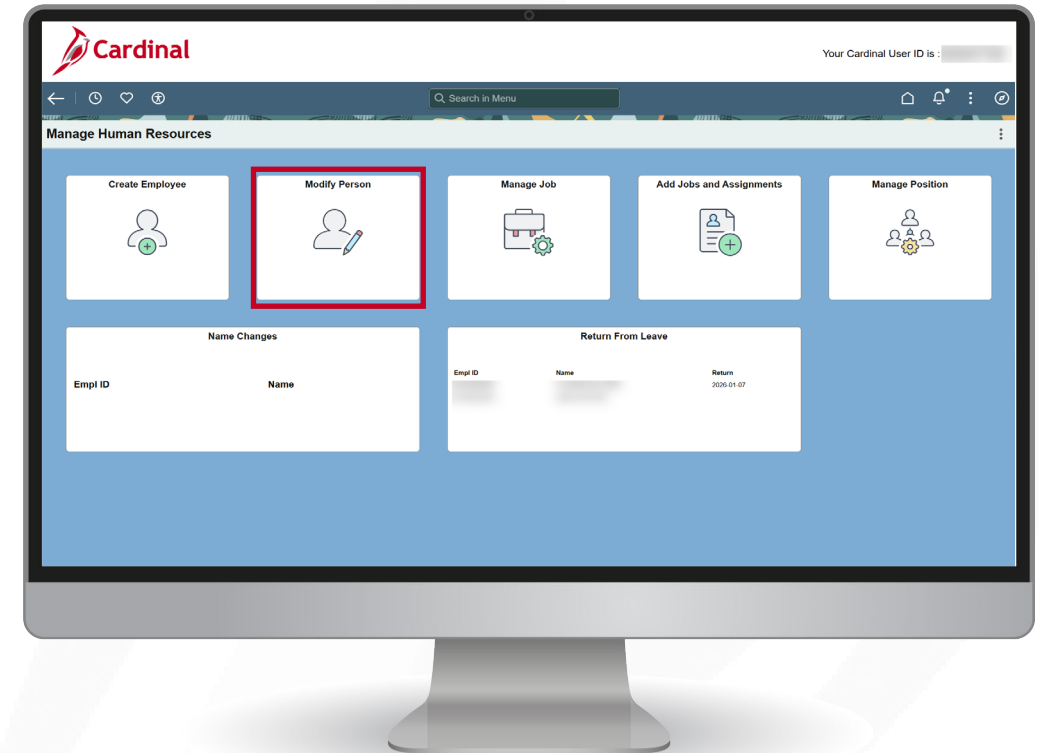
Field Label	Proposed Information
Position Number	DLI00TRN-Regional Health Director
Company	DLI-Dept of Labor and Industry
Business Unit	18100-Dept of Labor and Industry
Department	18100-DEPT OF LABOR AND INDUSTRY
Location	RICH-Dept of Labor and Industry
Establishment ID	DOLI-Dept of Labor and Industry
Job Code	69036-Compliance Manager II
Reports To	DLI00532-Health

Modify Person

The **Modify Person** tile replaces **NavBar > Menu > Workforce Administration > Personal Information > Modify a Person**.



Current State



Future State

Modify Person

Enhancements to Modify Person include a simplified Search page and a layout that matches the Person Data page in Create Employee.

Summary: Displays all edits for review before the final change is submitted.

The screenshot shows the 'Modify Person' interface for Miss Piggy Lee (noemail@virginia.gov). The progress bar at the top indicates 'Person Data' as the active step (1) and 'Summary' as the next step (2). A 'Next >' button is in the top right. The left sidebar contains icons for Person Details, Contact Information, Regional, VA Person Info, and Validation. The main content area is titled 'Step 1 of 2: Person Data' and includes a 'Person Details' section with a 'Names' table.

Format Type	Effective Date	Display Name	Formal Name
English <i>CURRENT</i>	06/01/2026	Miss Piggy Lee	Miss Pigathia Lee

Below the names table is the 'Personal Information' section with fields for: *Date of Birth (06/14/1974, 52 years 2 months), Birth Country (USA, United States), Birth State (FL, Florida), Birth Location (Tampa), and Date of Death. An 'Exclude Contact Information?' checkbox is at the bottom right.

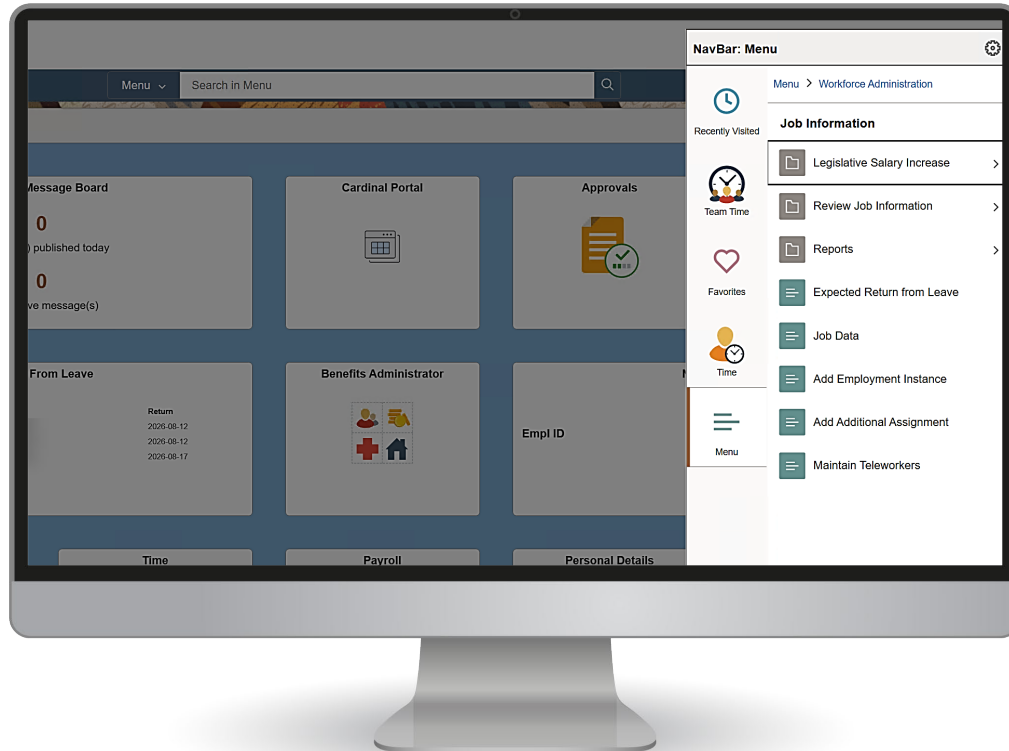
The screenshot shows the 'Summary' step (2) of the 'Modify Person' process. The progress bar at the top shows 'Person Data' as step 1 and 'Summary' as step 2. A '< Previous' button is on the left and a 'Submit' button is on the right. The main content area is titled 'Step 2 of 2: Summary' and includes a 'Summary of Changes' table.

Field Label	Proposed Information	Current Information
Type ●	Business	Not Available
Type / Number ●	Business / 555/555-5555	Not Available

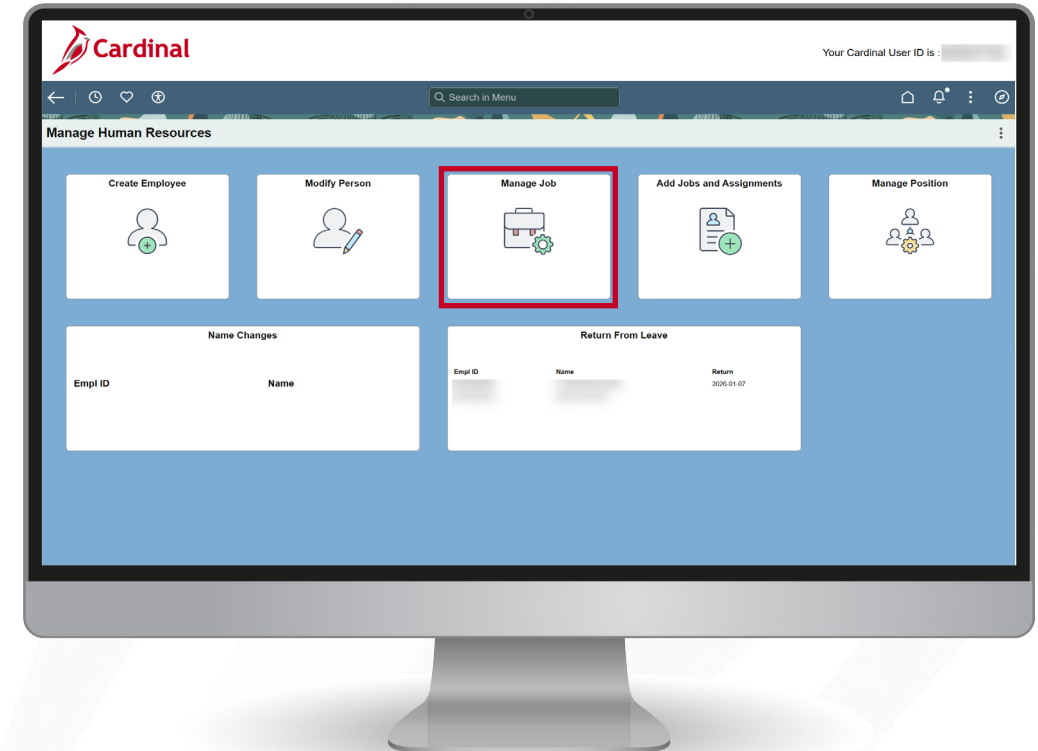
At the bottom, there is a 'Changes Made ●' section.

Manage Job

The **Manage Job** tile replaces **NavBar > Menu > Workforce Administration > Job Information > Job Data**.



Current State



Future State

Manage Job - Search

The Manage Job search functions identically to the current Job Data search while delivering a modern, streamlined interface. Selecting a search result opens the new Job Actions Summary page directly.

The screenshot displays the 'Manage Job' search interface. At the top, there's a 'Search Existing' section with a 'Search Criteria' dropdown. Below this, there are several search filters: 'Empl ID' (begins with), 'Name' (begins with), 'HR Status' (begins with), 'Department' (begins with), 'Empl Record' (=), 'Last Name' (begins with), 'Business Unit' (begins with), and 'Business Title' (begins with). There are also 'Search', 'Clear', and 'Save Search' buttons. Below the search criteria, there's a 'Basic Search' link. The 'Search Results' section shows a table with one row of results. The table has columns for Empl ID, Empl Record, Display Name, First Name, Last Name, Middle Name, Business Unit, Company, HR Status, Position Number, Payroll Status, and Pay Group. The first row shows a profile icon, an empty Empl ID field, '0' for Empl Record, 'Apple Pie' for Display Name, 'Apple' for First Name, 'Pie' for Last Name, '18100' for Business Unit, 'DLI' for Company, 'Active' for HR Status, 'DLI00022' for Position Number, 'Active' for Payroll Status, and 'SM1' for Pay Group.

Empl ID ↑	Empl Record ↑	Display Name ↑	First Name ↑	Last Name ↑	Middle Name ↑	Business Unit ↑	Company ↑	HR Status ↑	Position Number ↑	Payroll Status ↑	Pay Group ↑
		Apple Pie	Apple	Pie		18100	DLI	Active	DLI00022	Active	SM1

Manage Job – Job Actions Summary

Displays the employee's most recent Job Action by default, with expanded view options for historical records by selecting Include History during the search or on the page.

- **Updated Action Button:** The **Create Job Action** button now replaces the former "Add Row" button to initiate new entries.

The screenshot shows the 'Job Actions Summary' page for an employee named Apple Pie. A modal window titled 'Create Job Action' is open, displaying fields for *Effective Date (08/18/2026), Effective Sequence (0), *Action, and *Reason. A red box highlights the 'Create Job Action' button on the right side of the page. Below the modal, a table lists job actions with columns for Effective Date / Sequence, HR / Payroll Status / Job Indicator, Action / Reason, Last Updated By / Date, Status, Job Code, Position, Reports To, Regulatory Region, Business Unit, Department, Location, Establishment ID, Company, Pay Group, Pay Group, Tax Location Code, Employee Classification, Employee Type, Standard Hours, FTE, Full/Part Time, Salary Admin Plan / Grade, FLSA Status, BAS Group ID, Action Date, and Actions.

Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group	Pay Group	Tax Location Code	Employee Classification	Employee Type	Standard Hours	FTE	Full/Part Time	Salary Admin Plan / Grade	FLSA Status	BAS Group ID	Action Date	Actions
06/15/2026 0	Active Primary Job	Data Change Data Change	06/15/2026	Completed	69034 Compliance/Safety Officer IV	DLI00022 Health Compliance Off Senior	DLI00018 Regional Health Director	USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY		DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFR107)	SM1 Semi-monthly Classified		CLS Classified Salary	S Salaried	40.00	1.000000	Full-Time	SW Statewide 5	Nonexempt	OEC OE State	06/15/2026	

Manage Job – Create Job Action

Initiating a Job Action opens a guided entry experience with built-in navigation and contextual links.

- **Progress Tracking:**
A side panel highlights each information section and tracks visited pages.
- **Related Information:**
A panel on the right provides quick links to relevant pages.

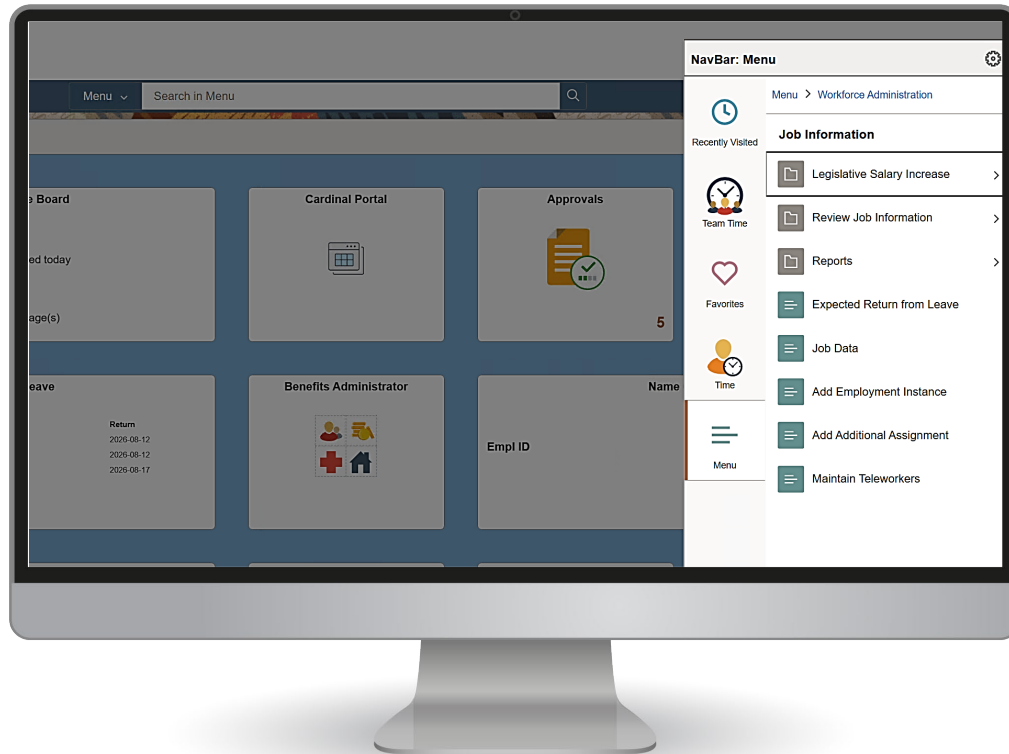
The screenshot shows a web application interface for managing job actions. The main form is titled 'Data Change - Data Change' and is for a user named 'Apple Pie' (ID: 0 | Health Compliance Off Senior, 18100 | DEPT OF LABOR AND INDUSTRY | Active). The form is divided into several sections:

- Work Location:** This section is highlighted in orange in the left sidebar. It contains fields for Effective Date (08/18/2026), HR Status (Active), Payroll Status (Active), *Job Indicator (Primary Job), Position Number (DLI00022), Position Entry Date (10/10/2017), Regulatory Region (USA), Business Unit (18100), Department (18100), Location (NORF), Date Created (08/18/2026), Last Start Date (10/10/2017), STD Claim Number, Layoff Notice Date, Recall Eligibility Flag, and Turn Off Auto Pay (Yes).
- Job Information:** Not Started.
- Salary and Compensation:** Not Started.
- Payroll:** Not Started.
- Employment Data:** Not Started.
- Benefit Program:** Not Started.
- Validate:** Not Started.
- Summary:** Not Started.

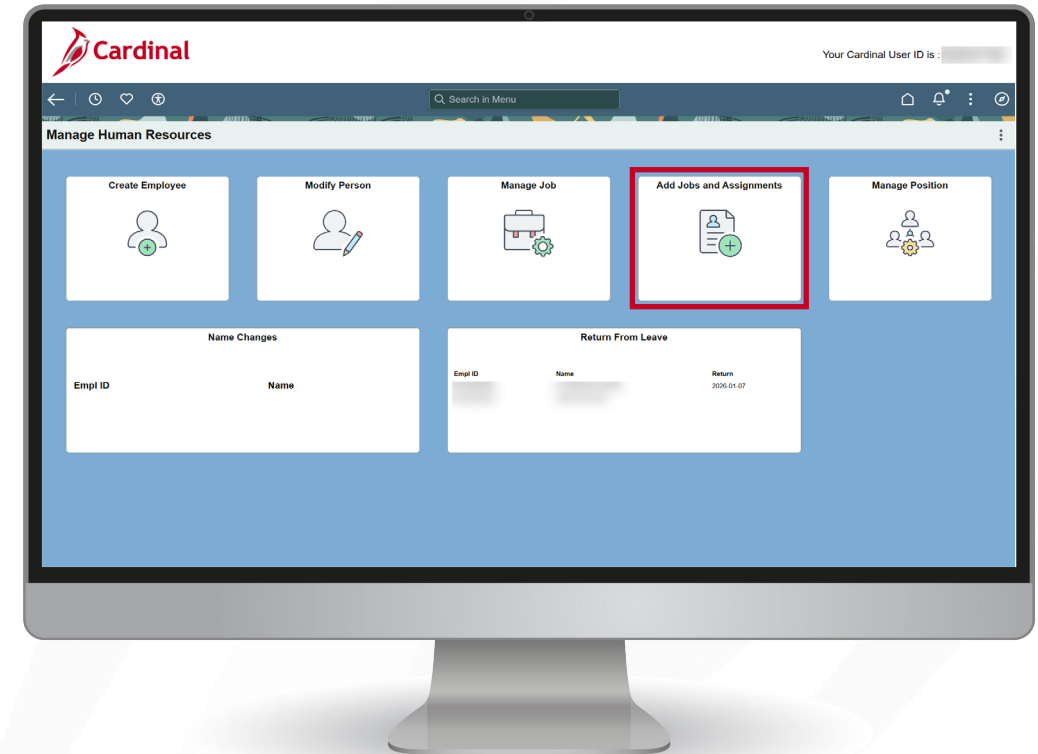
On the right side, there is a 'Related Information' panel with a 'Reference Links' section containing links for 'Maintain Teleworkers' and 'View Job Details'. A 'Next >' button is located at the top right of the form.

Add Jobs and Assignments

The **Add Jobs and Assignments** tile replaces **NavBar > Menu > Workforce Administration > Job Information > Add Employment Instance & Add Additional Assignment**.



Current State



Future State

Add Jobs and Assignments

The Add Jobs and Assignments tile simplifies how HR Administrators assign secondary roles to existing employees. The Search page on this tile uses the Employee ID and takes the user to the Organizational Relationship page, where they can choose to either **Add an Organizational Relationship** or **Manage Job Data**.

Organizational Relationship

JOHN DOE

Add Organizational Relationship

Relationship - Employee

Instance Nbr 0

HR Status Inactive

Payroll Status Terminated

Last Hire Date 10/17/2022

Termination Date 05/25/2026

Assignments

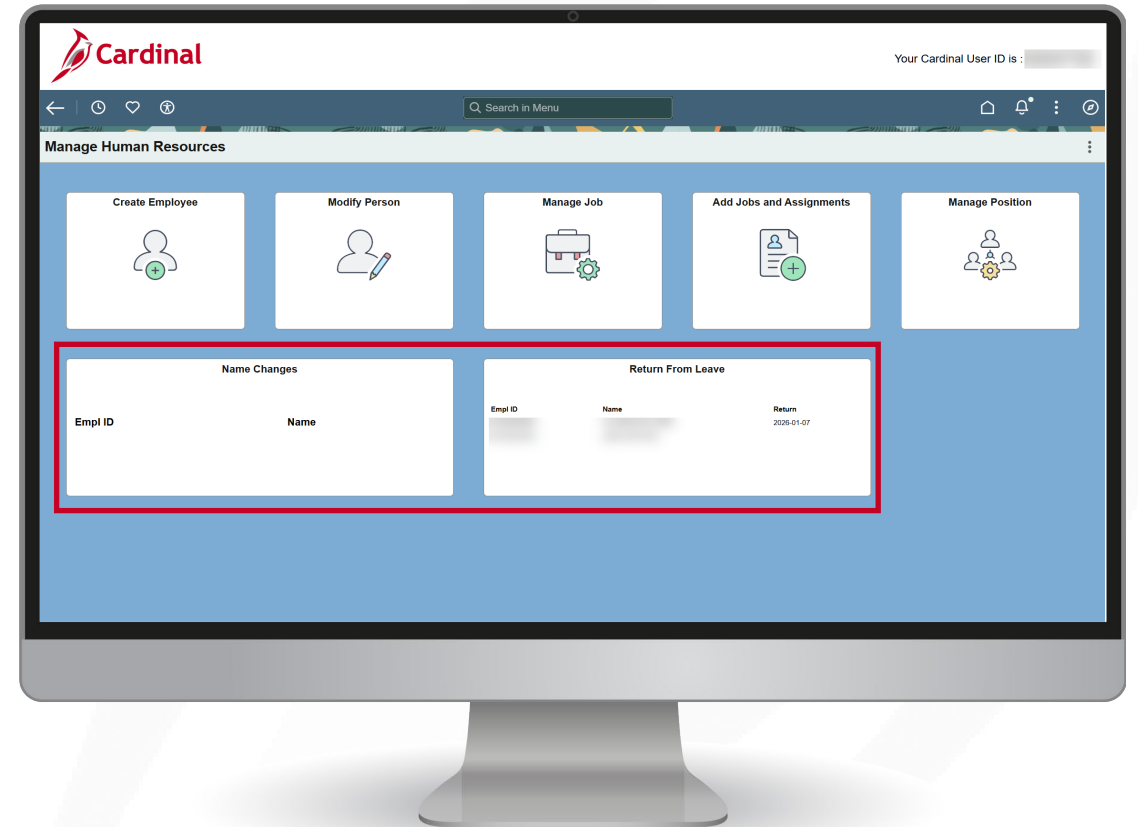
Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	
0	Home	05/26/2026	18100	18100	Inactive	10/17/2022	
Primary Job			Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Terminated	05/25/2026	Manage Job

Name Changes and Return From Leave

The **Name Changes** and **Return From Leave** tiles are now located within the Manage Human Resources tile.

Functionality for these tiles remain the same.

- **Name Changes Tile:** Notifies HR Admins of approved name changes for employees with active jobs in another agency.
- **Return From Leave Tile:** Displays employees who are on leave and are approaching their expected return date.



LIVE DEMONSTRATION

Human Resources Enhancements





Q & A

Next Steps

EXPLORE THE CARDINAL UPGRADE WEBPAGE

 cardinalproject.virginia.gov/upgrade



Communications & Infographics



Videos



Webinar Recordings & Presentations



Go-Live Resources

Share Your Feedback!

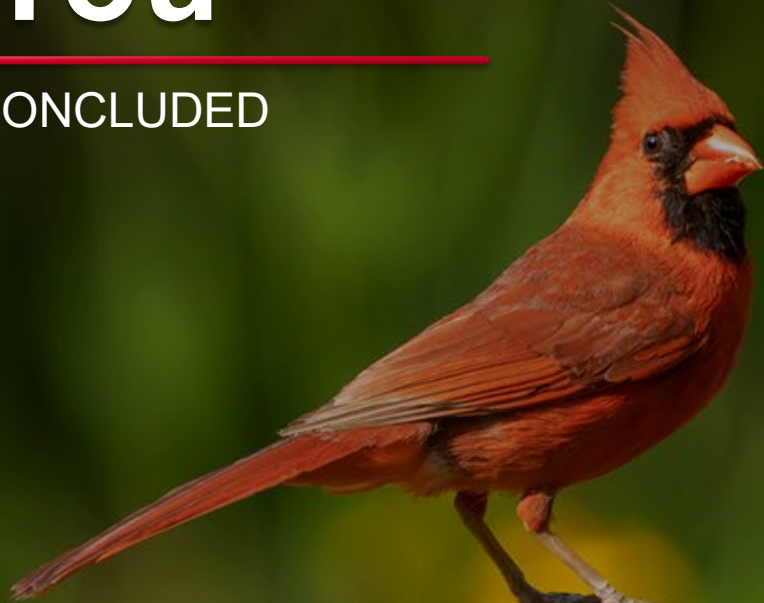
Scan the QR code or click the link below to take a brief survey.



<https://forms.office.com/g/vBXaPJeEub>

Thank You

PRESENTATION CONCLUDED



We Value Your Feedback!

Scan the QR code or click the link below to take a brief survey.



<https://forms.office.com/g/vBXaPJeEub>

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