Viewing and Modifying Personal Data Overview

This Job Aid walks the HR Administrator through the process to view and modify an employee's personal data in Cardinal. Many of these transactions can also be performed by the employee using Employee Self Service (ESS) functionality. The Name Change entered by the employee via ESS is simply a request until the employee provides the appropriate documentation to the HR Administrator to approve it.

When an employee has multiple active jobs in multiple agencies in Cardinal, the personal information is shared as there is only ONE personal data record. Agencies may update existing personal data, which will impact changes across other business units. A scenario that causes issues for the employee is: updates to the email address being changed by one agency, impacting the employee's access to Cardinal. If the employee has multiple active jobs, please explain this potential impact to the employee so that they can inform their additional employer(s) regarding what job and email address should be primary. This is typically seen when the employee has an hourly job at ABC or VCCS (both interface their HR data from agency HR system of record) and obtains a salaried job at another agency.

Note: if the employee has an hourly job and a salaried job, the salaried job and email address will be primary. The secondary employer should be notified NOT to change the employee's primary business email address.

Navigation Note: Please note that you may see a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Navigating to the Modify a Person Page

1. Navigate to the **Modify a Person** page using the following path:

    Menu > Workforce Administration > Personal Information > Modify a Person

The **Personal Information Search** page displays.

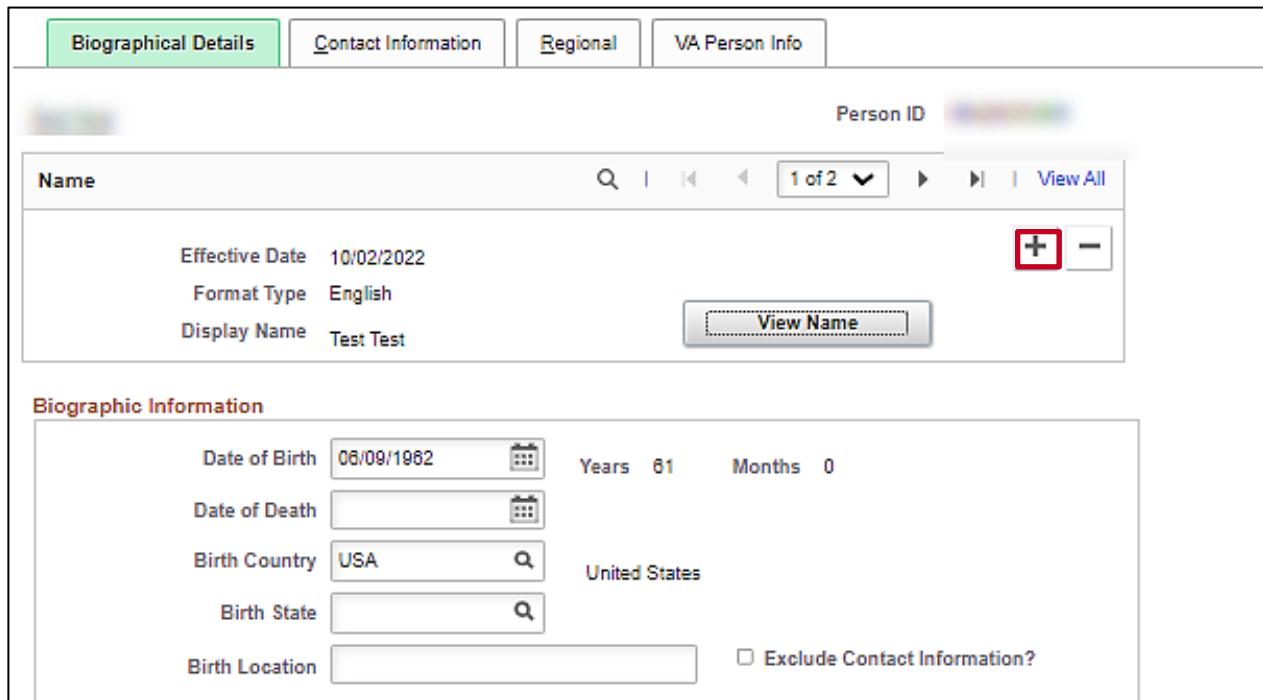2. Enter the employee's Employee ID in the **Empl ID** field.

    Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

3. Click the **Include History** checkbox.

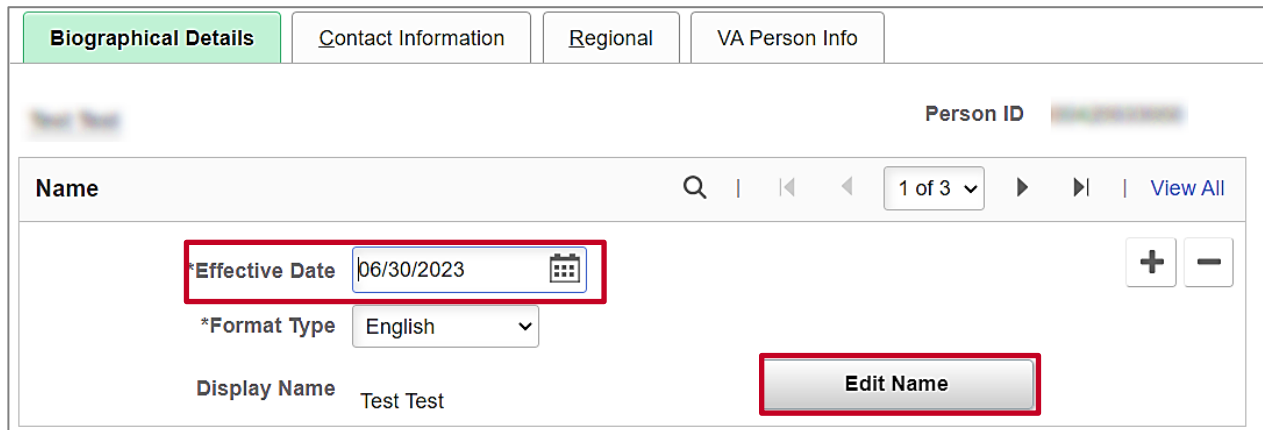4. Click the **Search** button.

Updating Name

The **Modify a Person** page displays for the applicable employee.

1. Click the **Add a New Row (+)** button in the **Name** section.

    The **Name** section displays for the applicable employee.

2. Click the **Edit Name** button.

3. Update the **Effective Date** of the name change.

    Note: The effective date of the name change cannot duplicate the current effective date. This section does not use the effective sequence which allows use of the same date more than once.

The **Name** entry window displays.

Name
English Name Format

Name Prefix	Mr ▾
*First Name	[blurred]
Middle Name	
*Last Name	[blurred]
Name Suffix	▾

Display Name	[blurred]
Formal Name	[blurred]
Name	[blurred]

OK	Cancel	Refresh Name

4. Make the applicable updates and click the **OK** button.

The **Biographical Details** tab redisplays.

Note: The updated name will appear in the **Name** section if the effective date has occurred. Otherwise, the current name will show until the effective date of the new name.

5. Once all required updates are made, click the **Save** button.

Updating Biographical History Information – Gender, Highest Education Level, or Marital Status

1. Scroll down to the **Biographical History** section as needed.

2. If changes need to be made to the employee's **Gender, Highest Education Level,** or **Marital Status**, click the **Add a New Row** icon in order to make an effective dated change.

3. Once all required updates are made, click the **Save** button.

Updating Contact Information – Address, Phone, or Email Address

1. Navigate to the **Contact Information** tab.

The **Contact Information** tab displays.

2. Click the **View Address Detail** link to update the employee's address.

The **Address History** page displays.

3. Click the **Add a New Row** icon.

The **Address History** page refreshes and the new row is displayed.

4. The **Effective Date** field defaults to the current date. Enter or select the effective date for the address change as needed.

5. Click the **Add Address** link.

    Note: An **Address Type** of **Home** is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the Home Address. Do not duplicate the same address in both fields.

The **Edit Address** page displays.

Edit Address

Country	United States
Address 1	100 Main Street
Address 2	
Address 3	

City	Chesterfield	State	VA 🔍 Virginia

Postal	23112

County	

OK	Cancel

6. The **Address** fields default with the employee's current address information. Update the address information as needed and then click the **OK** button.

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

Address History

Address Type   Home

| Address History | Q | \| | \|◄ | ◄ | 1 of 2 ▼ | ► | ►\| |

*Effective Date   07/25/2023 📅

Country   USA 🔍

*Status   A 🔍

Add Address

Address   100 Main Street
Chesterfield, VA 23112

➕ ➖

Effective Date   01/31/2023

Country   USA

Status   A

Address   200 Main Street
Dumphries, VA 23219

➕ ➖

OK   **Cancel**   **Refresh**

7. Click the **OK** button.

The **Contact Information** tab returns with the updated address information.

8. To update a phone number for the employee, simply highlight the existing value and update the phone number (no new effective dated row is needed).

9. To add a new phone number, click the **Add a New Row** icon within the **Phone Information** section and then enter the new phone number information.

10. To update an email address for the employee, complete these sections based on the following guidelines:

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

        i.   Select the email option of **Agency Provided Email**

        ii.   Click the **Email Type** dropdown button and select "Business"

        iii.   Enter the email address in the **Email Address** field

        iv.   Select the **Preferred** checkbox option

Note: Notify the employee of their email and provide information to register for Cardinal Employee Self Service using this email.

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

        i.   Click the **Pending Agency Provided Email** option

        ii.   Click the **Email Type** dropdown button and select "Business"

        iii.   Enter "Noemail@virginia.gov" in the **Email Address** field

Note: The **Missing Email** query is helpful to find employees who still have the placeholder email address of noemail@virginia.gov in your agency.

Once the employee's business email is obtained, replace this email address with their new email address. Notify the employee of their email address and provide information to register for Cardinal Employee Self Service using this email.

If this is not updated, the employee will not be able to register for access to the Cardinal system Employee Self Services features.

        iv.   Select the **Preferred** checkbox option

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

   i.   Click the **Employee Provided Email** option

   ii. Click the **Email Type** dropdown button and select "Personal"

   iii. Enter the email address in the **Email Address** field

   iv. Select the **Preferred** checkbox option

   Note: The email entered must be provided to the employee as they will need it to register and access the Cardinal system Employee Self Services features.

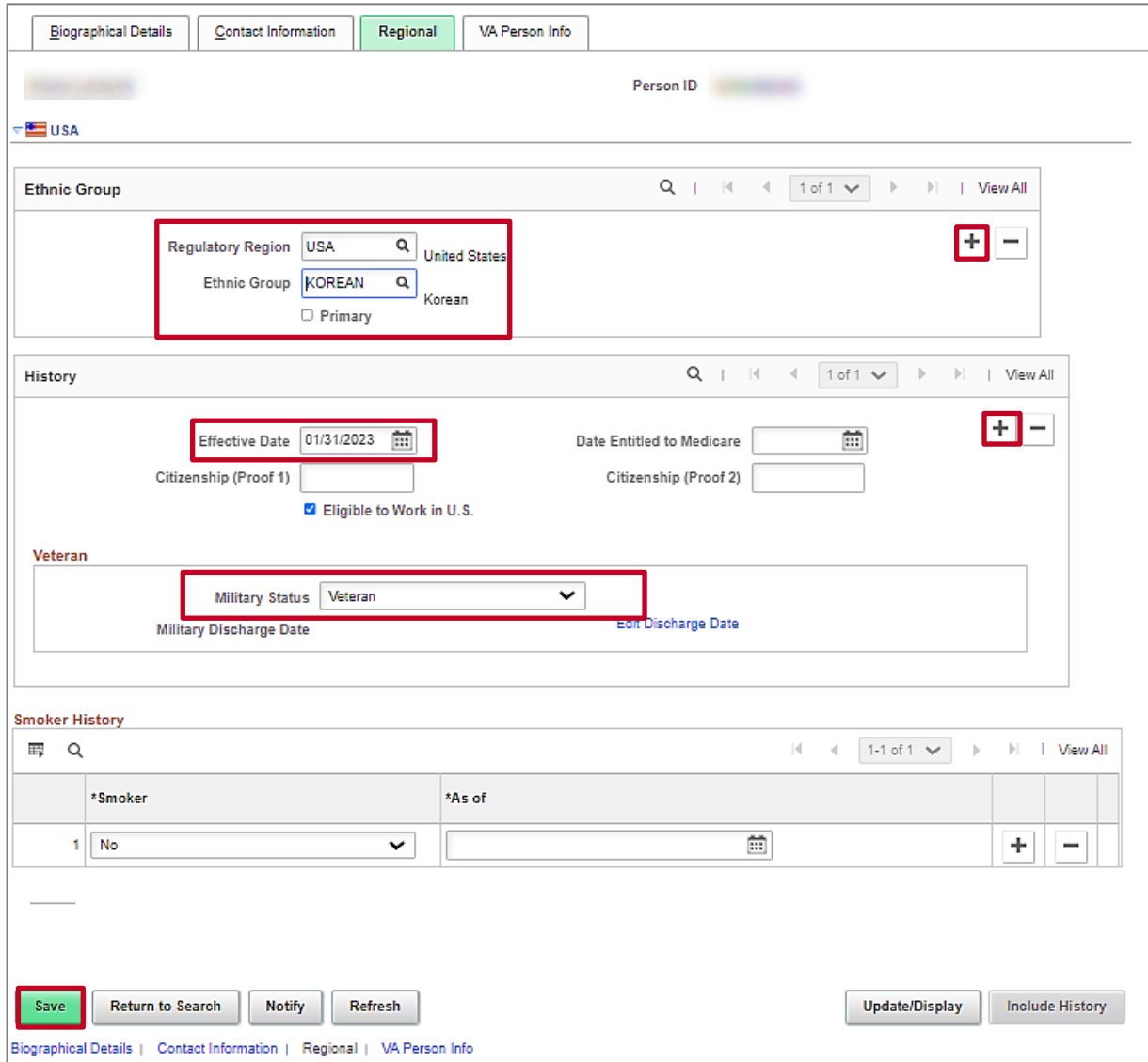**11.** To add a new email address, click the **Add a New Row** icon within the **Email Address** section and then enter the new email address information.

12. Once all required updates are made, click the **Save** button.

CARDINAL

Updating Ethnic Group and Military Status

1. Navigate to the **Regional** tab.

The **Regional** tab displays.

2. To update the ethnicity for the employee, simply enter or select the updated ethnicity in the **Ethnic Group** field within the **Ethnic Group** section (no new effective dated row is needed).

3. Enter the **Military Status** using the drop-down menu.

    Note: Updates to Military Status require a new effective dated row. To update the employee's military status after their hire action is completed, click the **Add a New Row** icon within the **History** section.
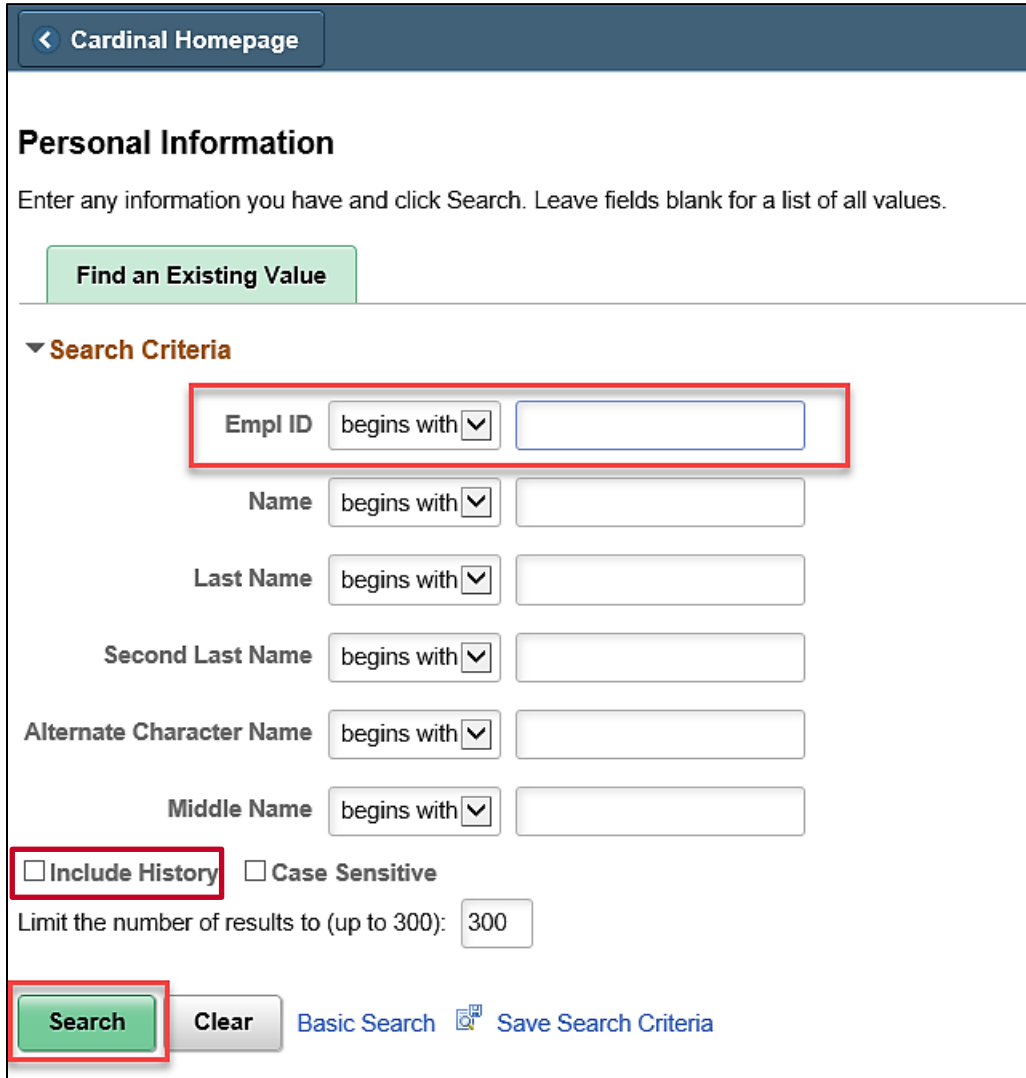
4. The **Effective Date** field defaults to the current date. Enter or select the effective date for the status change as needed.

5. Update the **Military Status** field using the dropdown button provided.

6. Click the **Save** button.

Updating VA Person Information

1. Navigate to the **Personal Information** page using the following path:

    Menu > Workforce Administration > Personal Information > Modify a Person

The **Personal Information Search** page will display.
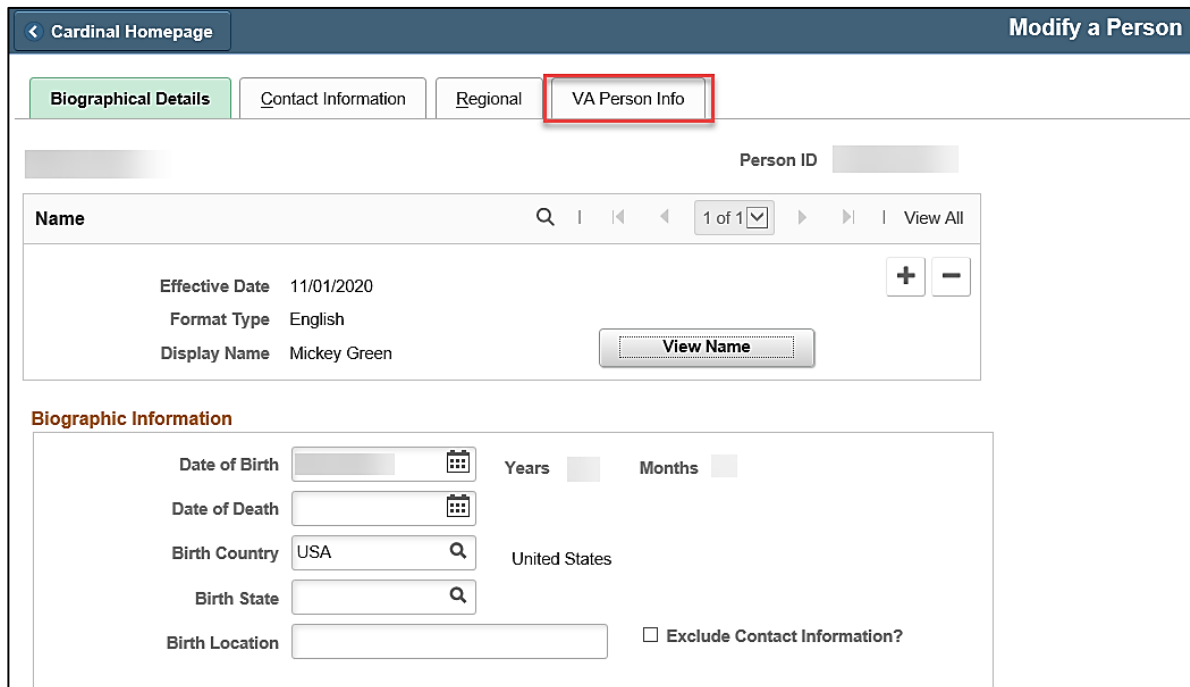

2. Click on **Clear** to remove any values in the search criteria.

3. In the **Employee ID** field enter the Employee 's ID

4. Click the **Include History** checkbox.
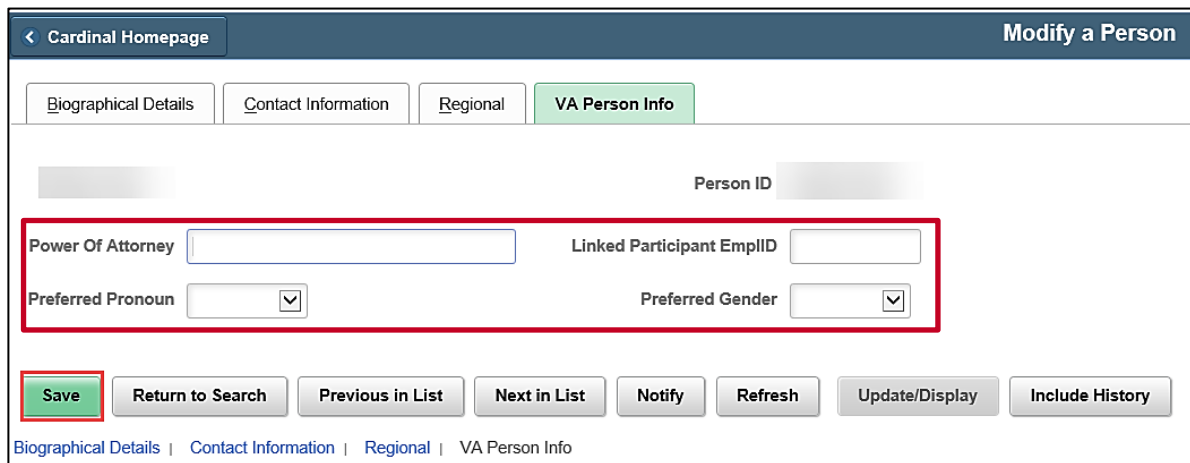
5. Click **Search**.

    The **Personal Information** page is displayed.

6. Click the **VA Person Info** tab.

   The **VA Person Info** tab is displayed.

7. If applicable, enter the name of the person who has legal Power of Attorney for the employee in the **Power of Attorney** field.

   Note: The Power of Attorney is very useful in the unfortunate event of a death in service. This person needs to be contacted for decisions regarding payout of leave and/or death certificate request.

8. If the employee is linked to another employee of the Commonwealth of Virginia, enter that employee ID in the **Linked Participant EmplID** field.

9. Select the **Preferred Pronoun** provided by the employee.

10. Select the **Preferred Gender** provided by the employee.

> **Note**: **Preferred Pronoun** and **Preferred Gender** can be entered via Employee Self Service by the employee.

11. Click **Save.**

> **Note:** This page is not effective dated. There is not a field for effective date or a way to insert a row. The user will simply make the change to the necessary field and save the record.

Updating Citizenship Status

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

    Menu > 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 ▼	
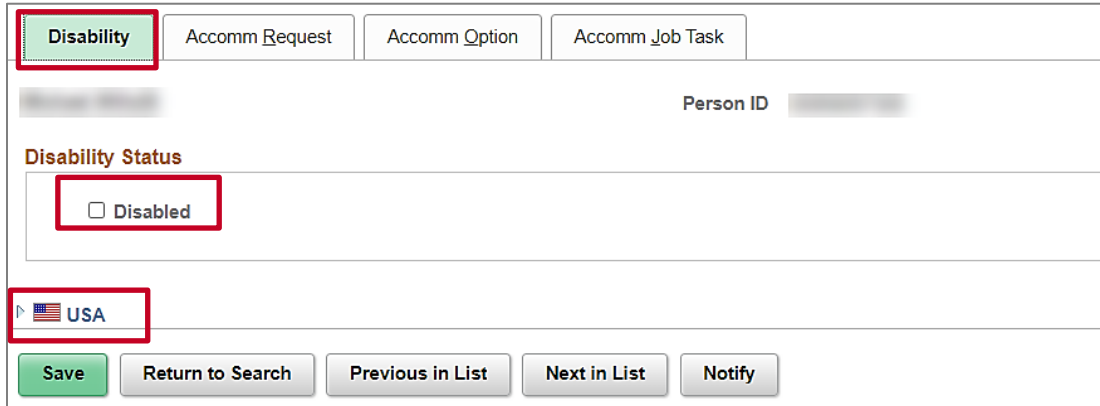
☐ Include History   ☐ Correct History   ☐ Case Sensitive

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

[Search]   [Clear]   Basic Search   Save Search Criteria

2. Enter the applicable Employee ID in the **Empl ID** field.

3. Click the **Include History** checkbox.

4. Click the **Search** button.

The **Identification Data** page displays with the **Citizenship/Passport** tab displayed by default and the original selection is documented at row 1.

5. Click the **Add a row** icon.

6. Click the **Country** drop down. Select "**USA**". This field must always be USA as this field references the country of employment.

7. Click the **Citizenship Status** dropdown.

8. Select the new status.

   Note: The option for a US Citizen is **Native**. If Citizenship Status is unknown at the time of hire, select **Not Indicated**. **Do not leave this field blank**. Reference the Citizenship Status Values section of this job aid for more guidance.

9. Click the **Save** button to save the action.

Citizenship Status Values

Citizenship Status	When to Use
Alien Permanent	Foreign national (green card holder) with permanent residence visa in the United States.
Alien Temporary	Non-citizens employed in the United States (work visa).
Canadian Citizen	Do not use – Instead use either **Alien Temporary** or **Alien Permanent** as applicable.
Employment Visa	Do not use – Instead use **Alien Temporary** option.
Native	United States citizen.
Not Indicated	The employee's citizenship is not indicated. This can be used by agencies who do not use Cardinal as their HR system of record.
Other	Do not use – Instead use **Not Indicated** option.
Permanent Resident	Do not use – Instead use **Alien Permanent** option.

![Cardinal logo]

Updating Employee Disability Information

Follow the steps below to enter/update employee disability information.

1.   Navigate to the **Disabilities** page using the following path:

    Menu > Workforce Administration > Personal Information > Disability > Disabilities

The **Disabilities** search page displays.

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

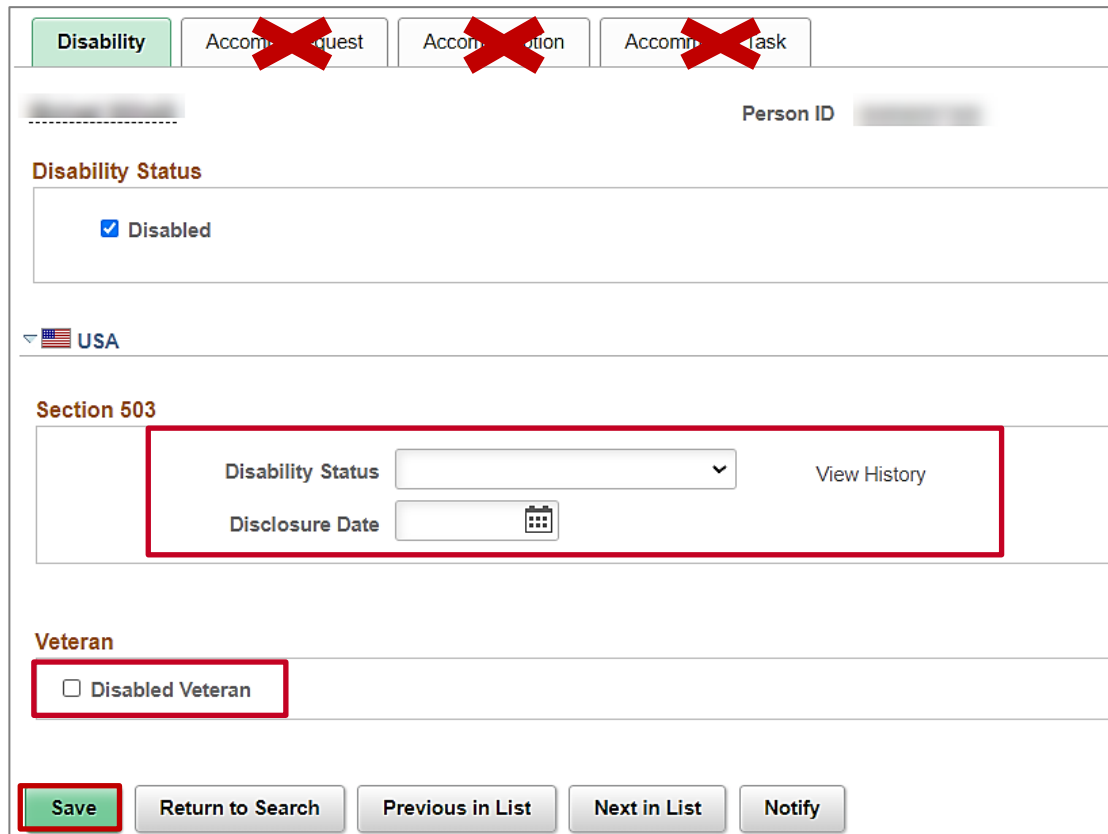3. Click the **Include History** checkbox.

4. Click the **Search** button.

The **Disabilities** page for the applicable employee displays.

5. Click the **Disabled** checkbox.

6. Click the **USA Flag** icon to expand that section of the page.

   The **Section 503** and **Veteran** sections display.

   Note: The **Accomm Request**, **Accomm Option**, and **Accomm Job Task** tabs are not utilized in Cardinal.

7. Select the appropriate **Disability Status** from the drop-down menu.

8. If the employee is a disabled veteran, as identified on their DD214, click the **Disabled Veteran** checkbox in the **Veteran** section.

9. Click the **Save** button.

Updating Emergency Contact Information

1. Navigate to the **Emergency Contact** page using the following path:

   Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact

The **Emergency Contact** page displays.

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

3. Click the **Search** button.

The **Emergency Contact** page displays for the employee with the **Contact Address/Phone** tab displayed by default.

4. Enter the emergency contact's first and last name in the **Contact Name** field.

5. If this is the employee's primary contact, check the **Primary Contact** checkbox option. Otherwise leave unchecked.

6. Click the **Relationship to Employee** dropdown button and select the applicable value.

7. If the emergency contact's address and/or phone number is the same as the employee, click the checkbox options for the **Same Address as Employee** and/or **Same Phone as Employee** fields. Otherwise, leave these unchecked.

    Note: If the **Same Address as Employee** checkbox option is checked, the **Contact Address** section changes to **Employee's Current Address** and the address in Personal Data for the employee displays in the **Employee's Current Address** section. The **Address Type** field updates to **Home**. If the **Same Phone as Employee** checkbox option is checked, the preferred phone number in Personal Data for the employee displays in the **Employee's Phone** section and the **Phone Type** updates to the option selected as the employee's preferred phone type.

Sample **Emergency Contact** page when the **Same Address as Employee** and **Same Phone as Employee** checkbox options are checked:

8. If the emergency contact's address is not the same as the employee, click the **Edit Address** button in the **Contact Address** section.

The **Edit Adress** page displays.

Edit Address

Country	United States [Change Country]
Address 1	
Address 2	
Address 3	
City		State	
Postal	
County	

[OK] [Cancel]
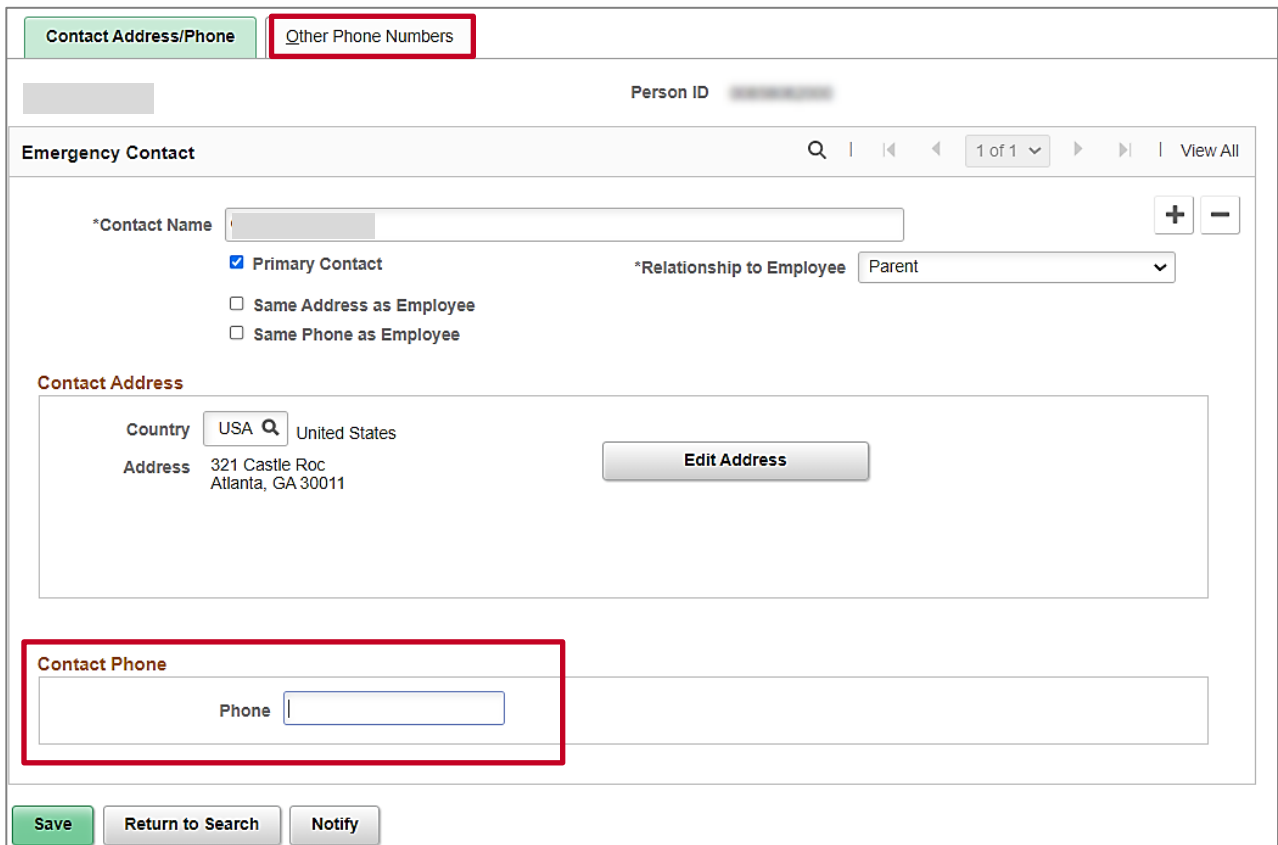
9. Complete all applicable fields on the **Edit Address** page for the emergency contact and then click the **OK** button.

The **Emergency Contact** page redisplays.

Contact Address/Phone | Other Phone Numbers

Person ID

Emergency Contact   1 of 1 ⌄   View All

*Contact Name [   ]   [+] [−]

☑ Primary Contact   *Relationship to Employee Parent ⌄
☐ Same Address as Employee
☐ Same Phone as Employee

Contact Address
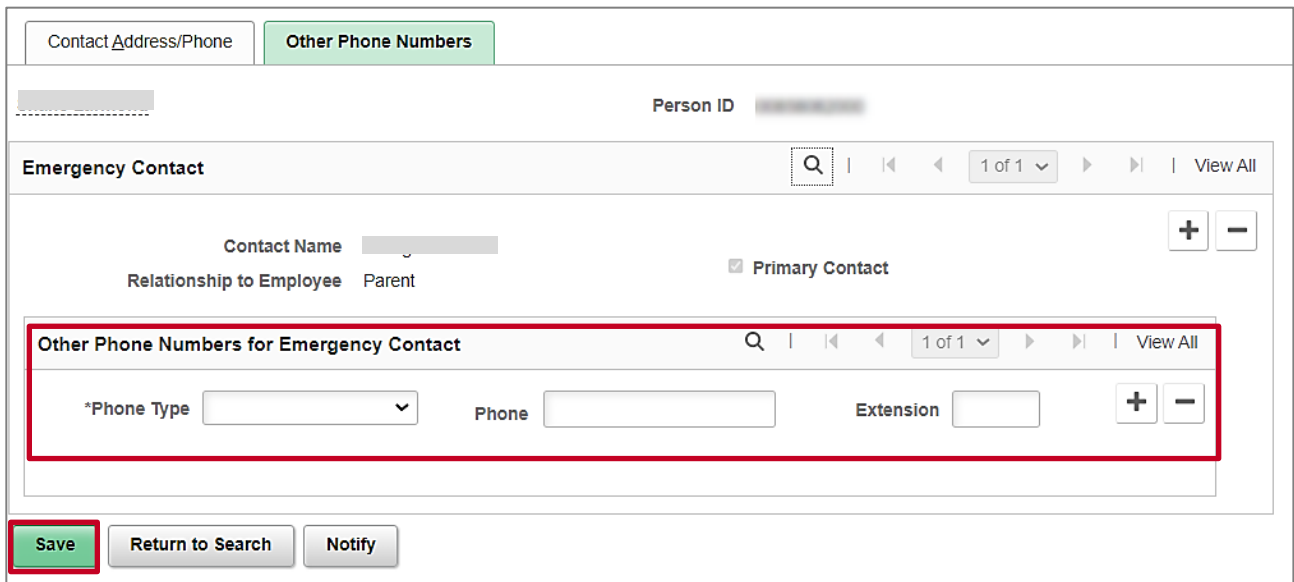
Country USA United States
Address 321 Castle Roc
Atlanta, GA 30011   [Edit Address]

Contact Phone

Phone [   ]

[Save] [Return to Search] [Notify]

10. Enter the emergency contact's phone number in the **Phone** field within the **Contact Phone** section.

11. Click the **Other Phone Numbers** tab.

The **Other Phone Numbers** tab displays.

12. Enter the additional phone numbers in the **Other Phone Numbers for Emergency Contact** section as applicable.   Use the **Add a New Row** icon as needed.

13. Click the **Save** button.