

Completing a New Hire Overview

The Hire employee business process applies to both salary and wage employees. This process is also used when transferring an employee from one agency to another agency, however the HR Administrator should follow 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**.

Before starting the new hire process, validate that the position the employee is being hired into has been created and is as expected including whether the position is eligible for telework. If something needs to be updated on the position, update it prior to hiring the employee. For more information on reviewing and/or updating position data, see the Job Aids titled **HR351_Managing Position Data** and **HR351_Managing Employee Teleworker Data**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.

Prior to processing the hire, you must also verify that a valid Social Security Number (SSN) is available for the employee as it is required to save the new hire transaction in Cardinal. If the employee does not have a valid SSN, a temporary one can be assigned until a permanent SSN is obtained by the employee. For further information on assigning a temporary social security number, see the Job Aid titled **HR351_Assigning and Monitoring Temporary SSNs**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

A search is required using the **Search Match** page before entering a new hire's personal data in Cardinal. The search is to prevent duplicate entries of the employee and uses the employee's SSN. If there is a match but only the employee's personal data is in Cardinal and not their job data, a new employment instance must be created to generate an employee record to use for the hire. Use the section of this job aid entitled, **Hiring a Person When Personal Data Exists in Cardinal** to process the hire.

Note: If a person's personal data already exists in Cardinal, be sure they are not actually a Rehire. If so, see the Job Aid titled, **HR351_ Completing a Rehire**. 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 option. If this checkbox is checked, the employee will NOT be included in the Active directory or employee directory extracts (e. g. Undercover Officers).

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.

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Adding 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:

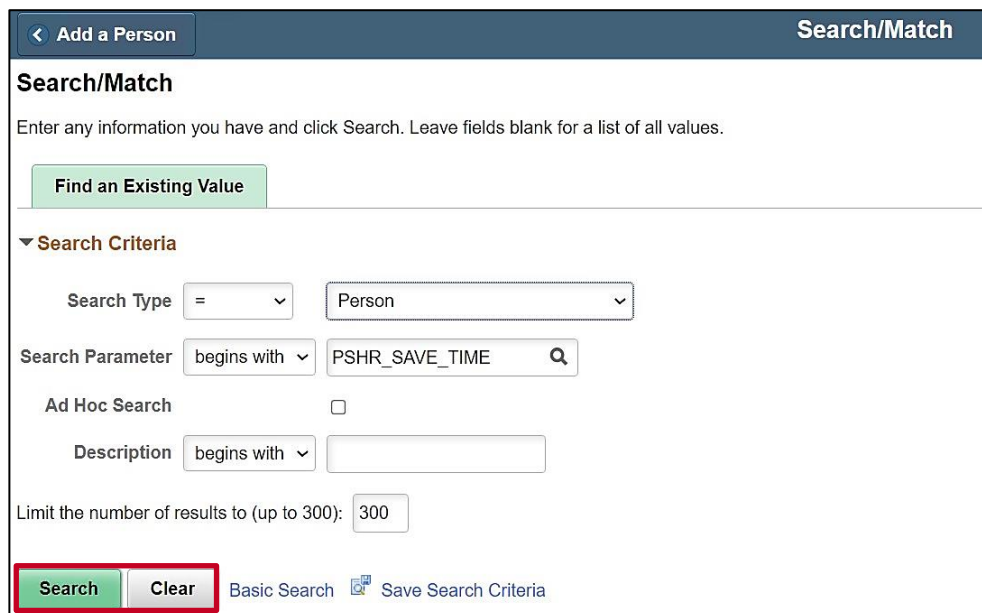
Menu > Workforce Administration > Personal Information > Add a Person

The **Add a Person** page displays.



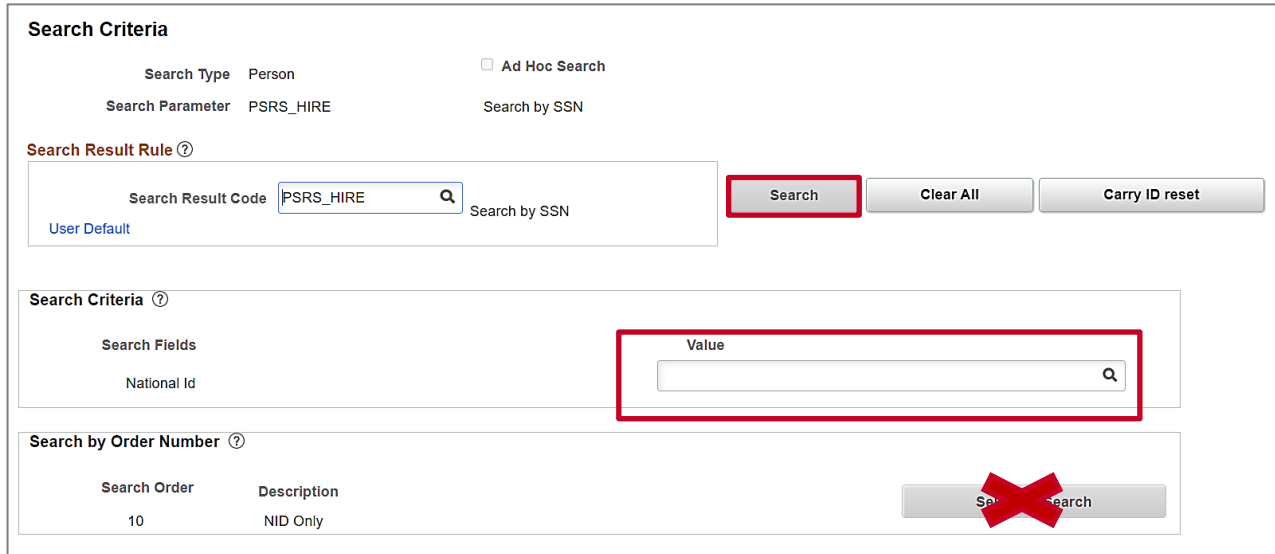
2. Click the **Search for Matching Persons** link.

The **Search/Match** page displays.



3. Click the **Clear** button.
4. Click the **Search** button.

The **Search Criteria** page displays.



Search Criteria

Search Type Person Ad Hoc Search

Search Parameter PSRS_HIRE Search by SSN

Search Result Rule ?

Search Result Code PSRS_HIRE Search by SSN **Search** Clear All Carry ID reset

User Default

Search Criteria ?

Search Fields Value

National Id

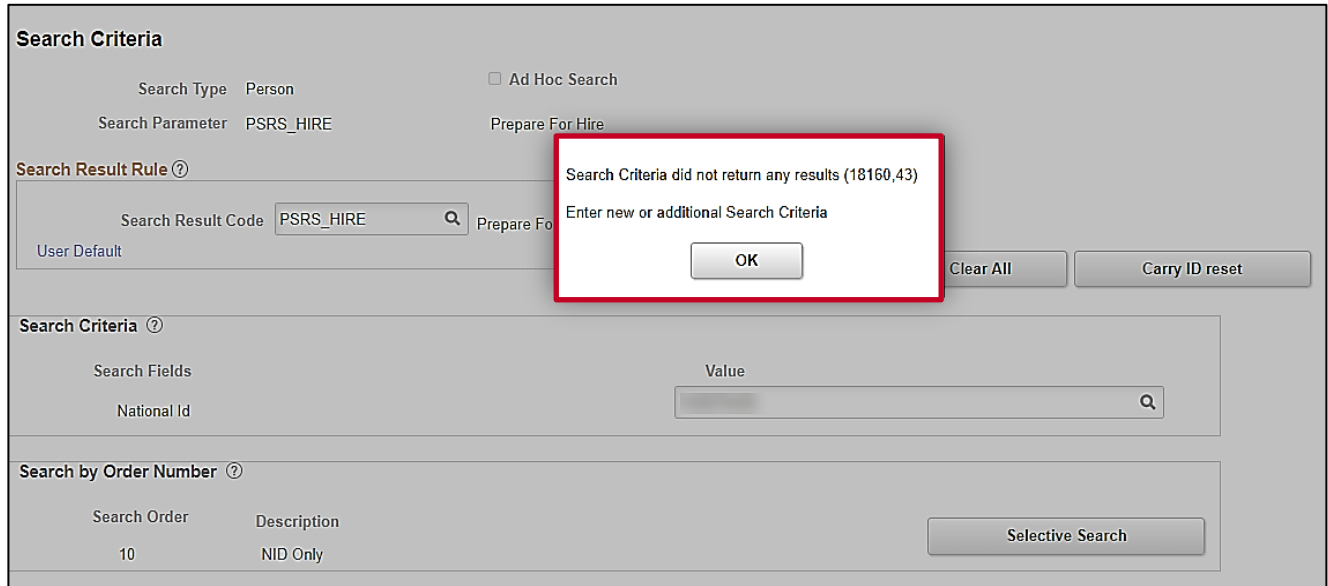
Search by Order Number ?

Search Order	Description
10	NID Only

Search

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

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

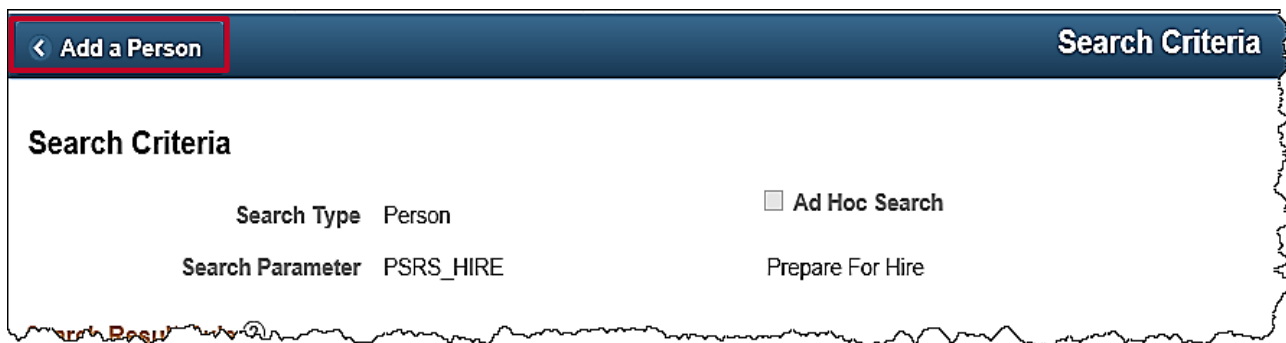


Note: The message depicted below displays when the employee's SSN is not in the Cardinal system. In these cases, proceed to Step 8.

If the system displays an Employee ID, the employee already exists in the Cardinal system. A bit of research, using the **Person Organizational Summary** page is needed to determine how to proceed. If the person has never worked at the Commonwealth of Virginia, refer to the [Hiring a Person When Personal Data Exists in Cardinal](#) section of this Job Aid. If the person has employment history, either 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**.

- Click the **OK** button to close the **Search Criteria Results** page.

The **Search Criteria** page returns.



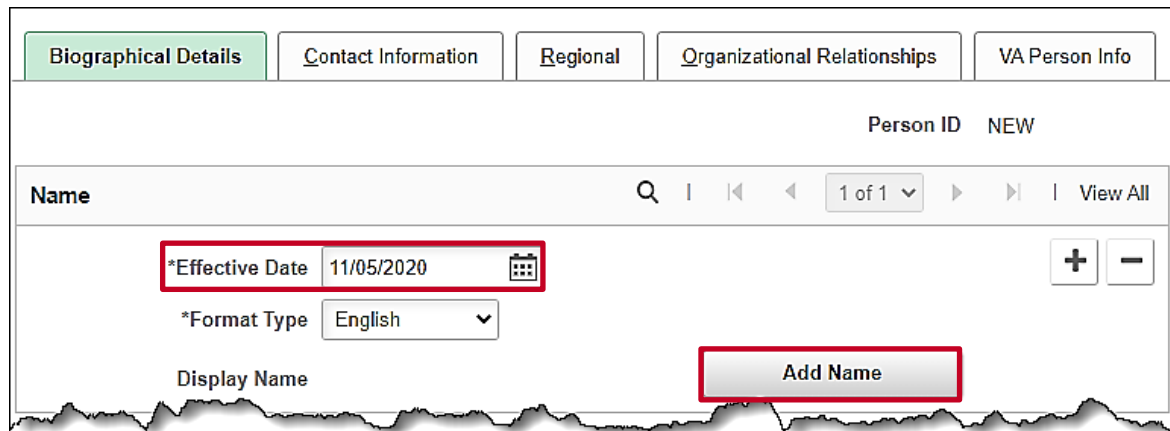
- Click the **Add a Person** tab in the top left corner of the page.

The **Add a Person** page returns.



10. Click the **Add Person** button.

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

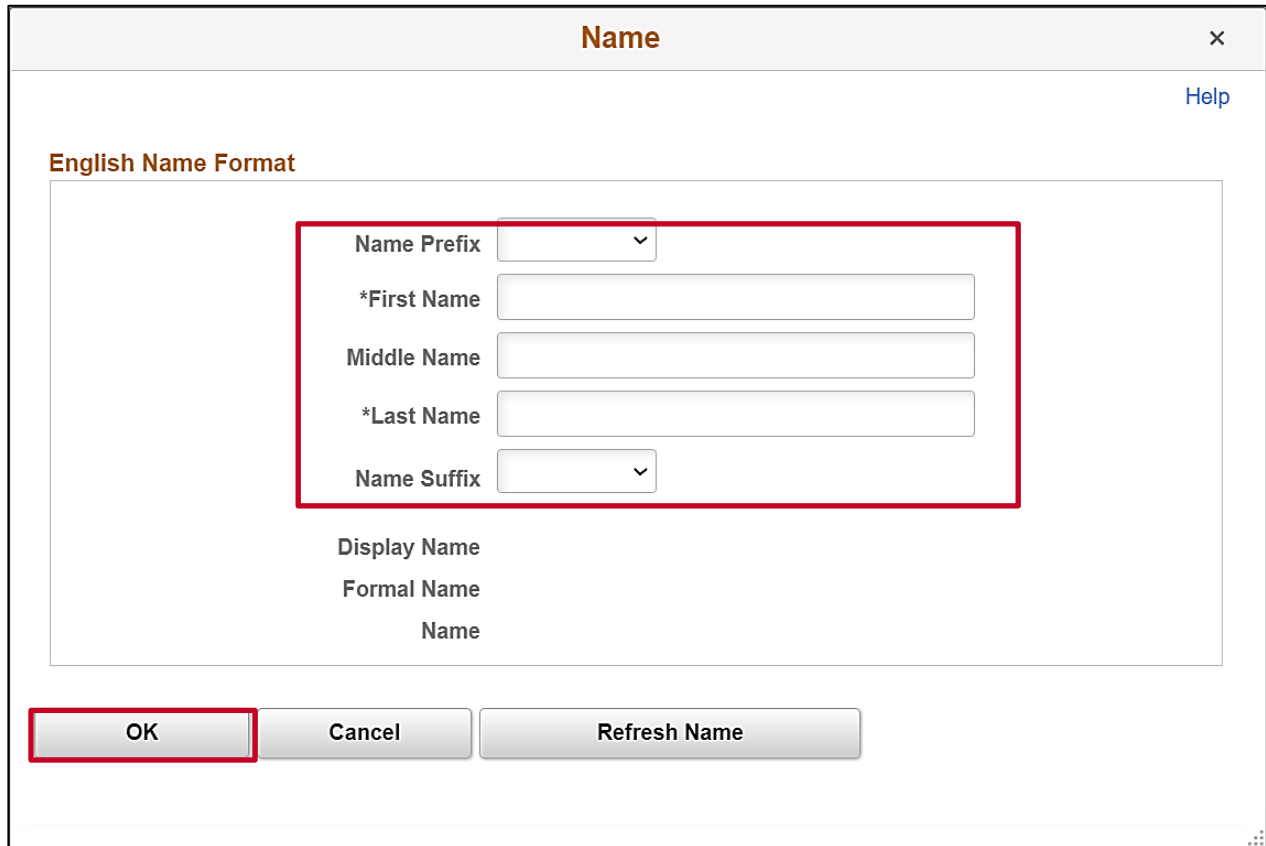


11. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire.

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**.

12. Click the **Add Name** button.

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



13. Optionally, click the **Name Prefix** dropdown button and select the applicable prefix.

14. Enter the employee's first name in the **First Name** field (required).

15. Optionally, enter the employee's middle name in the **Middle Name** field (optional).

Note: Do not add a period behind the middle initial.

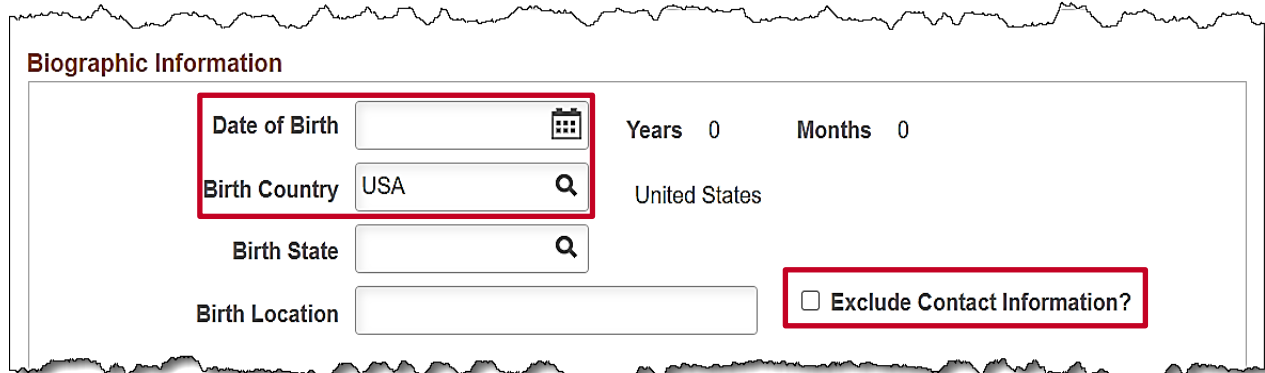
16. Enter the employee's last name in the **Last Name** field (required).

Note: Do not include suffixes (Jr, Sr, or IV) in the **Last Name** field.


17. As needed, click the **Name Suffix** dropdown button and select the applicable suffix.


18. Click the **OK** button.


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



Biographic Information

Date of Birth  Years 0 Months 0

Birth Country  United States

Birth State 

Birth Location

Exclude Contact Information?

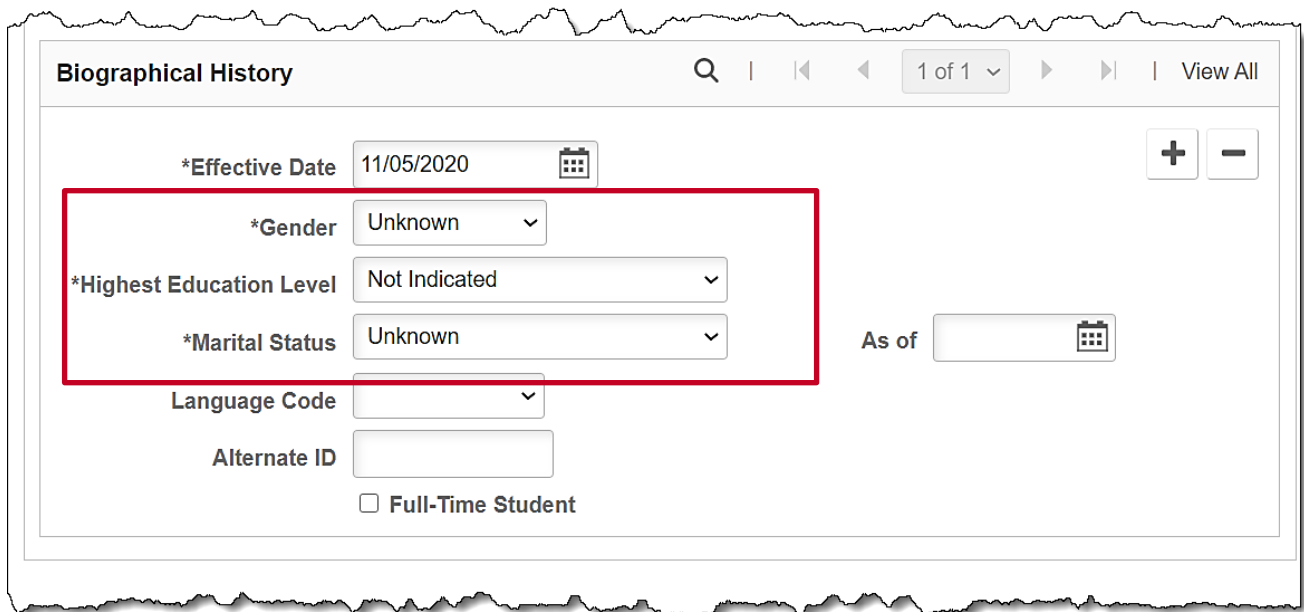
19. Enter the employee's date of birth (required) in the **Date of Birth** field.


20. The **Birth Country** field defaults to "USA". This can be updated but is not required as we do not report on this field.




21. Click the **Exclude Contact Information** checkbox option if the employee's personal information should NOT be sent to VITA in the Active Directory Extract or COV Employee Directory Extract (e. g. Undercover Officers).


22. Scroll down to the **Biographical History** section.


The **Biographical History** section displays.





Biographical History  | < << 1 of 1 >> > | View All


*Effective Date   

*Gender 

*Highest Education Level 

*Marital Status 

As of 

Language Code 

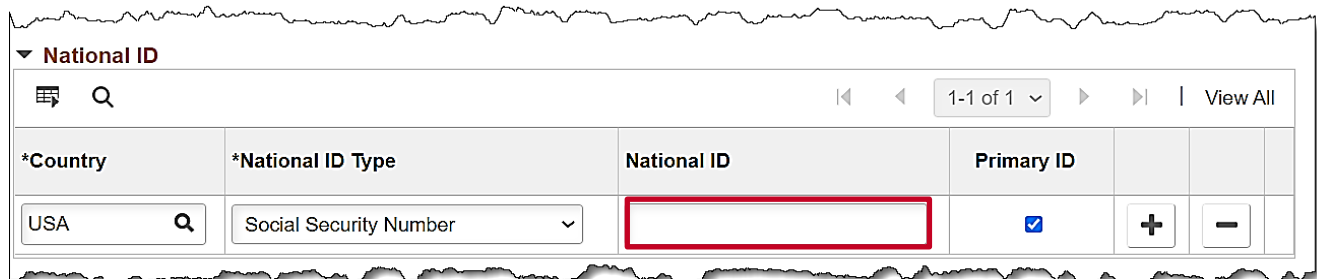
Alternate ID

Full-Time Student

23. The **Effective Date** field within this section defaults to the effective date selected above.
24. Click the **Gender** dropdown button and select the employee's gender. This field is a required field for benefits and payroll purposes and must provide the employee's legal gender. This is not to be confused with the optional **Preferred Gender** field located on the **VA Person Info** tab.

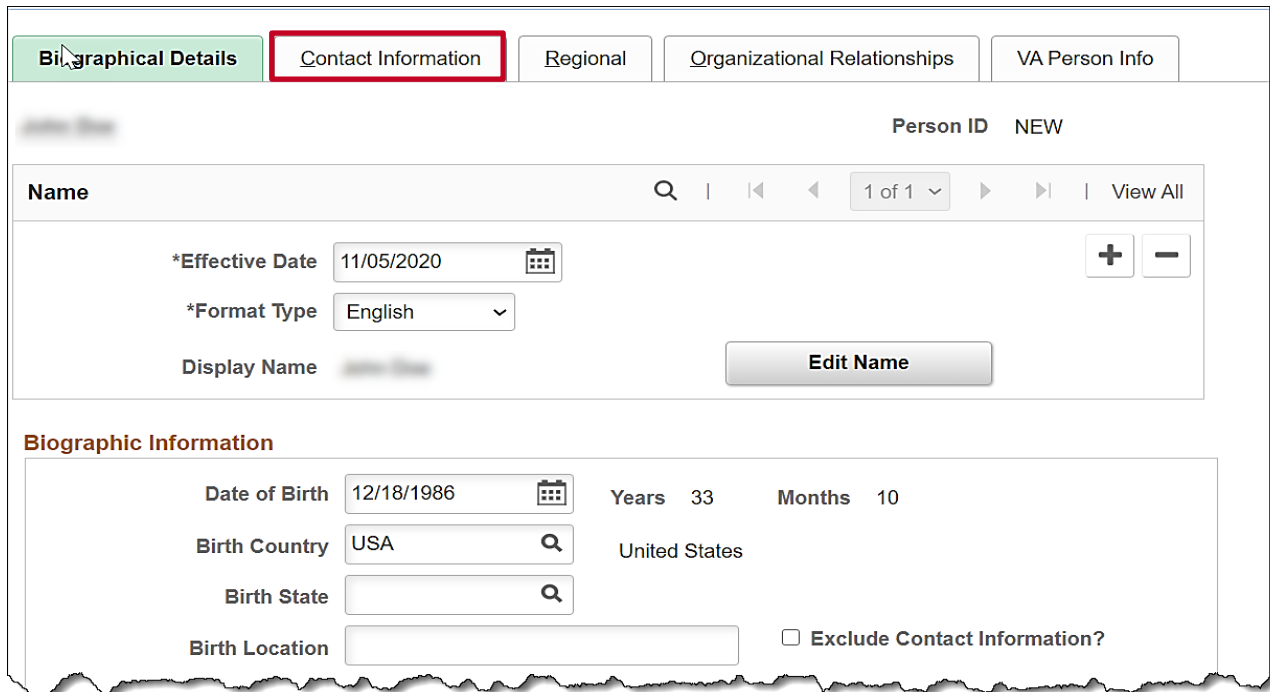
Note: The **Gender** field defaults to "Unknown". If it is not updated prior to payroll processing, the employee's payroll will error out. Please update the gender field as soon as information is obtained.
25. Enter the employee's **Highest Education Level**.
26. Enter the employee's legal **Marital Status**.
27. The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
28. Scroll down 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"/>	+	-

29. Enter the employee's Social Security Number (SSN) in the **National ID** field.
30. Scroll back up to the top of the page to access the tabs.



Person ID NEW

Name

*Effective Date 11/05/2020

*Format Type English

Display Name

Biographic Information

Date of Birth 12/18/1986 Years 33 Months 10

Birth Country USA United States

Birth State

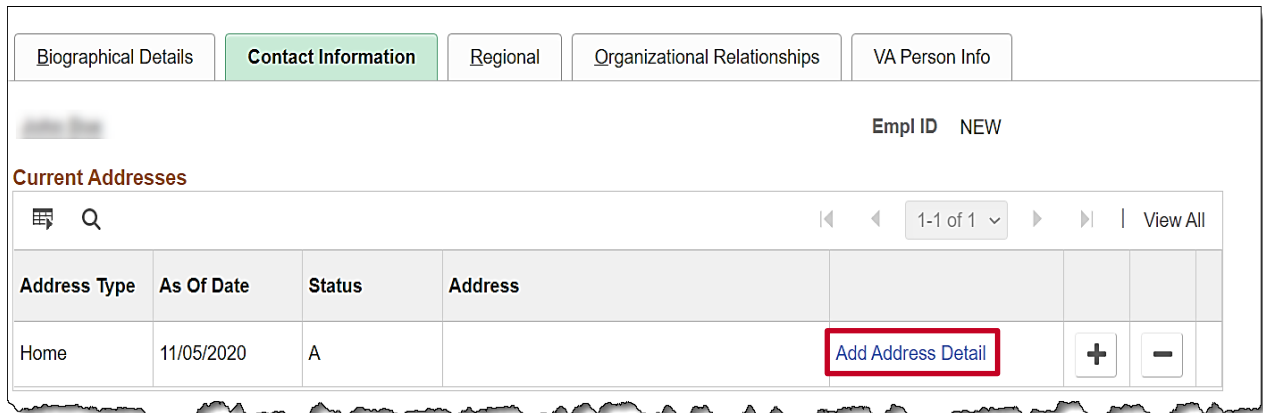
Birth Location

Exclude Contact Information?

Edit Name

31. Click the Contact Information tab.

The **Contact Information** tab displays.



Empl ID NEW

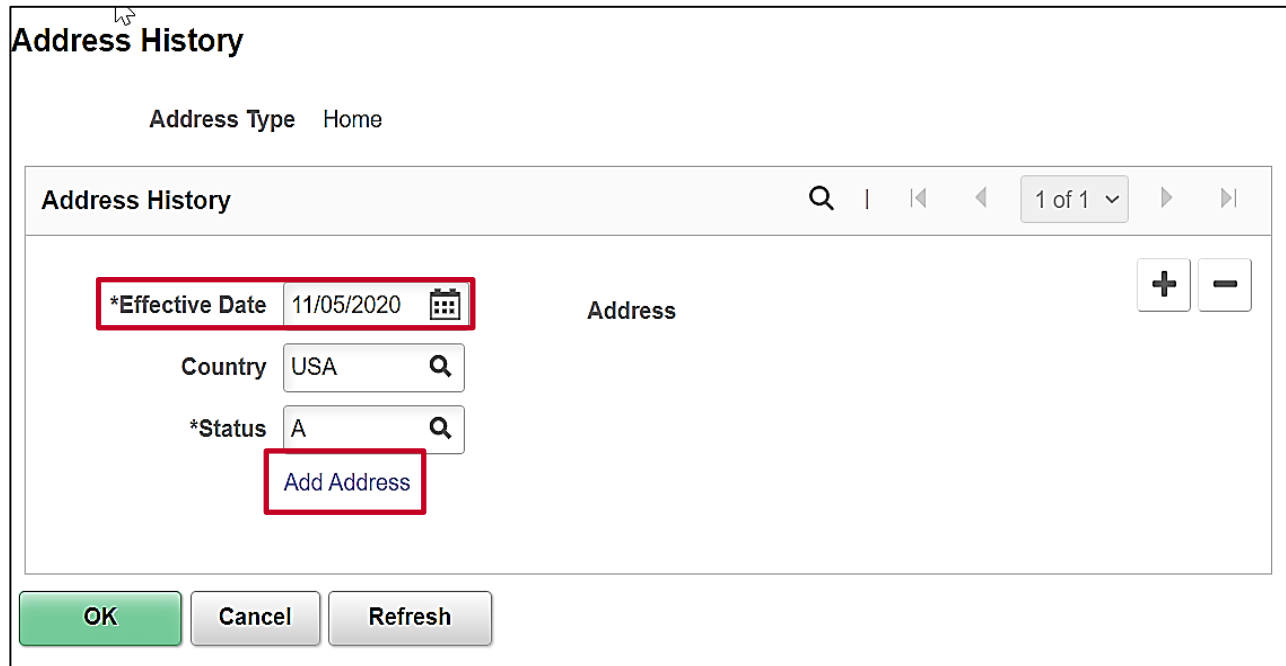
Current Addresses

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

Add Address Detail

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

The **Address History** page displays.



Address History

Address Type Home

Address History		1 of 1
*Effective Date	11/05/2020	Address

Country USA

*Status A

[Add Address](#)

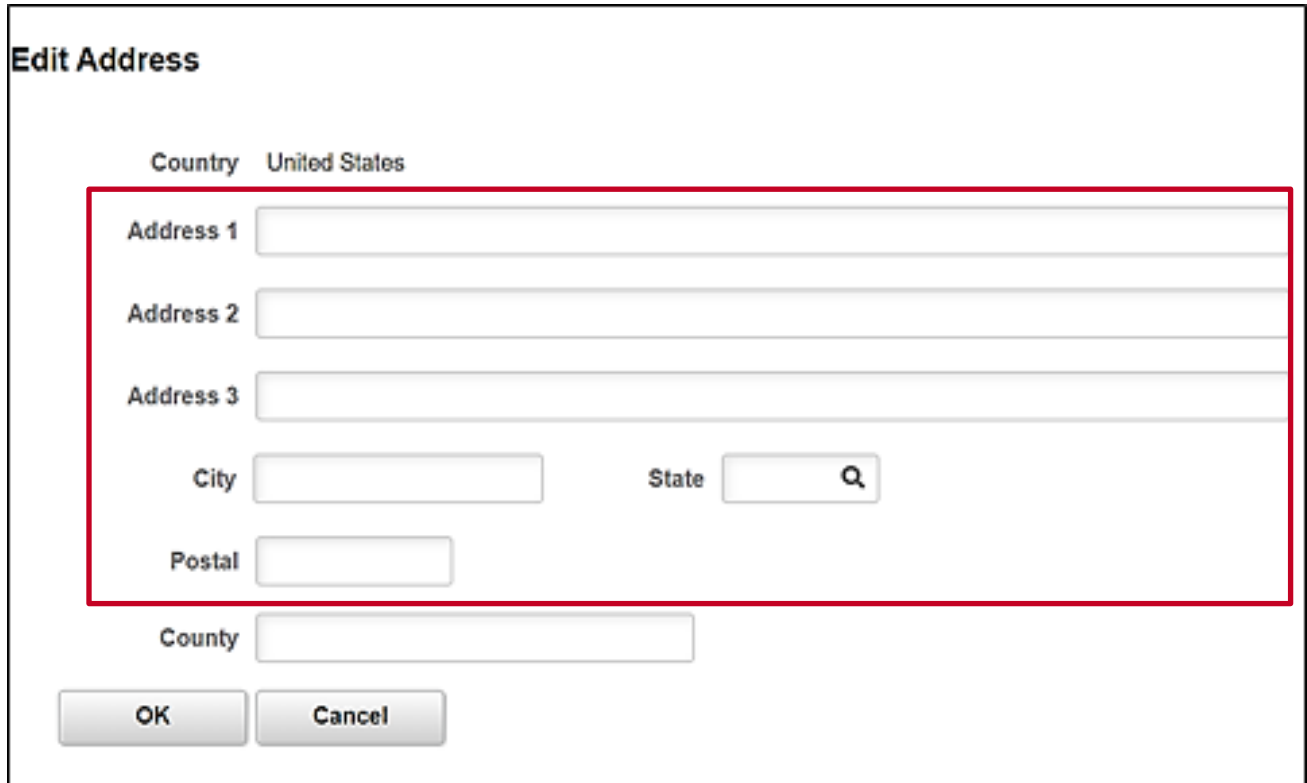
OK Cancel Refresh

33. The **Effective Date** field within this section defaults to the date selected.

34. 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

Address 2

Address 3

City State

Postal

County

OK Cancel

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

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

36. Click the **OK** button.

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

Address History

Address Type Home

Address History Q | ◀ ▶ 1 of 1 ▼ ▶ ▶

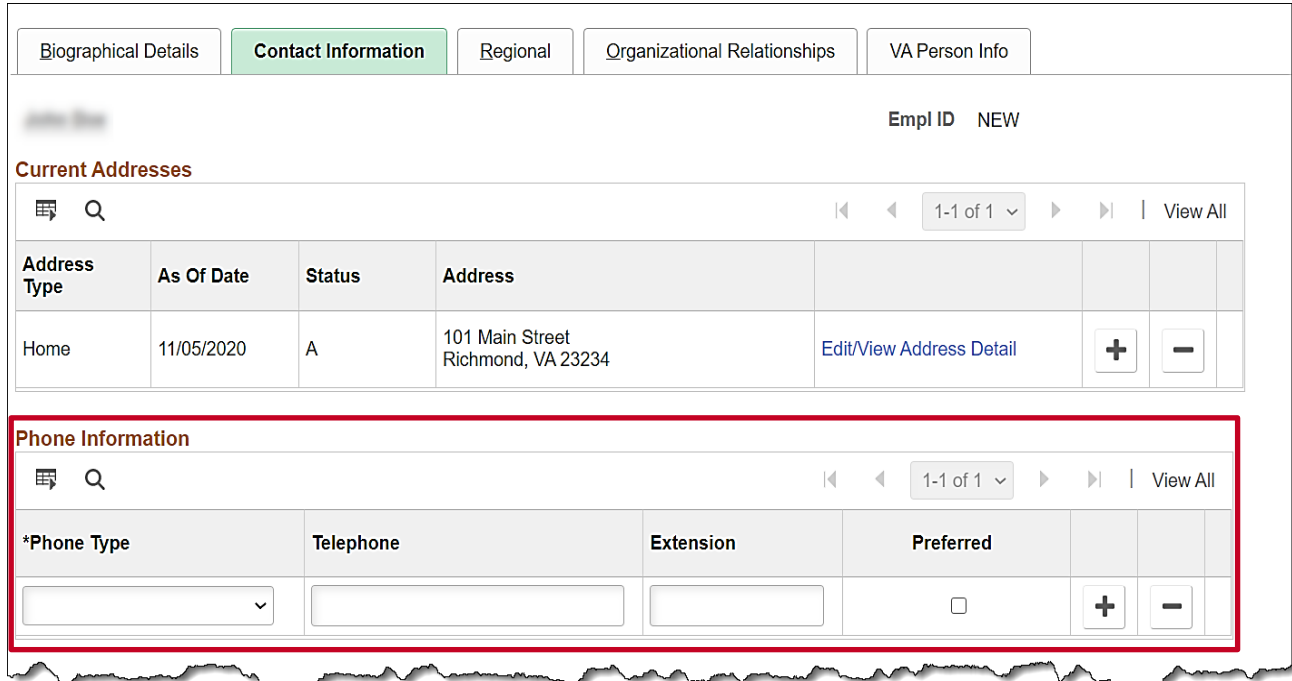
*Effective Date	11/05/2020 📅	Address	101 Main Street Richmond, VA 23234	+	-
Country	USA Q				
*Status	A Q				

[Add Address](#)

OK Cancel Refresh

37. Click the **OK** button.

The **Contact Information** tab returns.



Biographical Details	Contact Information	Regional	Organizational Relationships	VA Person Info
[Redacted]				Empl ID NEW
Current Addresses				
[Search icon] [Search field] [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				
[Search icon] [Search field] [1-1 of 1] [View All]				
*Phone Type	Telephone	Extension	Preferred	
[Dropdown]	[Text Field]	[Text Field]	<input type="checkbox"/>	[+] [-]

38. Click the **Phone Type** dropdown button and select the type of phone.

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

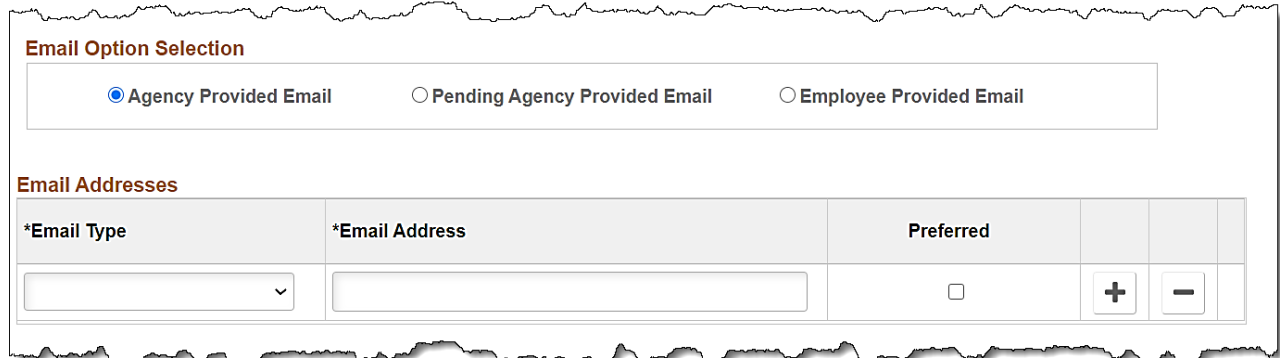
Note: It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.

40. Select the **Preferred** checkbox option to identify the employee's preferred phone number.

41. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (+) and then repeating steps 38 - 40.

42. Scroll down to the **Email Option Selection** and **Email Addresses** sections.

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



Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

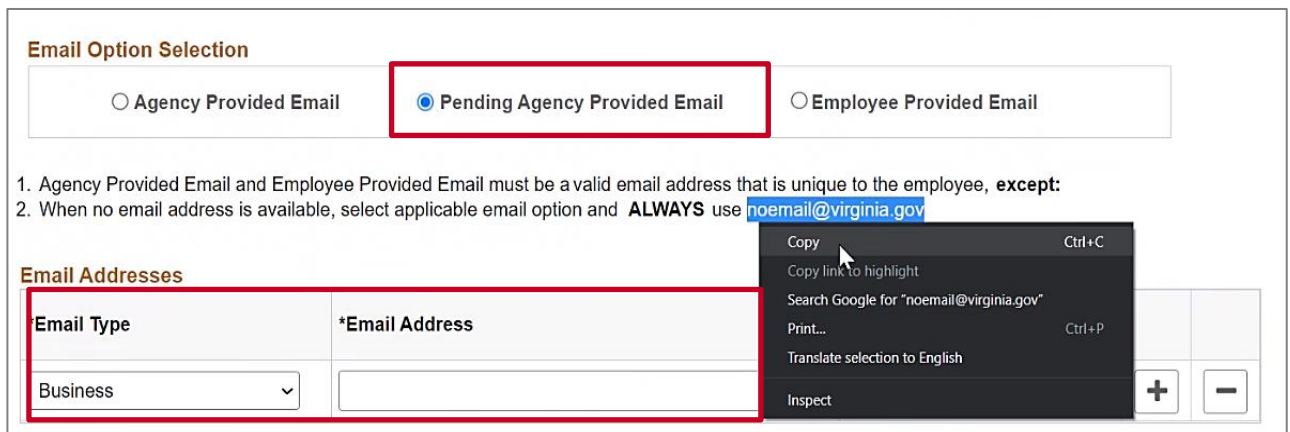
Email Addresses

*Email Type	*Email Address	Preferred		
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

43. 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. 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 address and provide information to register for Cardinal Employee Self Service using this email.



Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, **except:**
 2. When no email address is available, select applicable email option and **ALWAYS** use noemail@virginia.gov

Email Addresses

Email Type	*Email Address	Preferred		
Business	<input type="text"/>	<input type="checkbox"/>	+	-

- b. If the employee’s business email has been requested, but not yet assigned or the employee chooses not to provide a personal email:
 - 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

iv. Select the **Preferred** checkbox option

Note: 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.

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

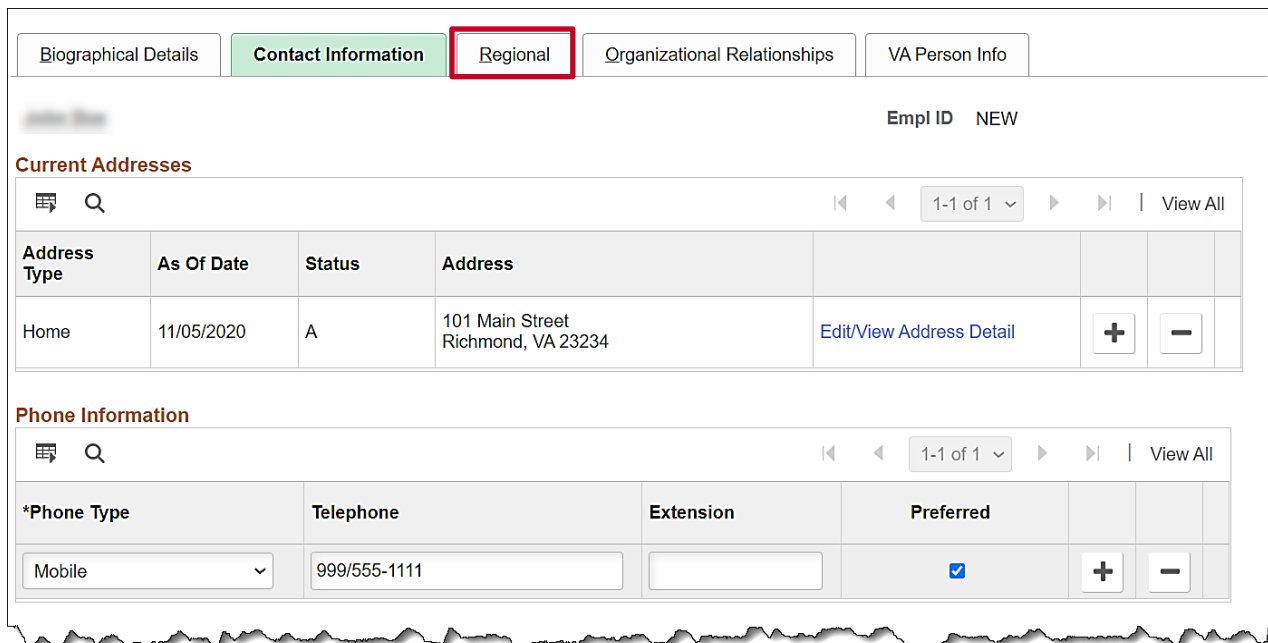
i. Click the **Employee Provided Email** option

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.



The screenshot displays the 'Regional' tab within the 'Contact Information' section of the HR351 system. The 'Current Addresses' table is as follows:

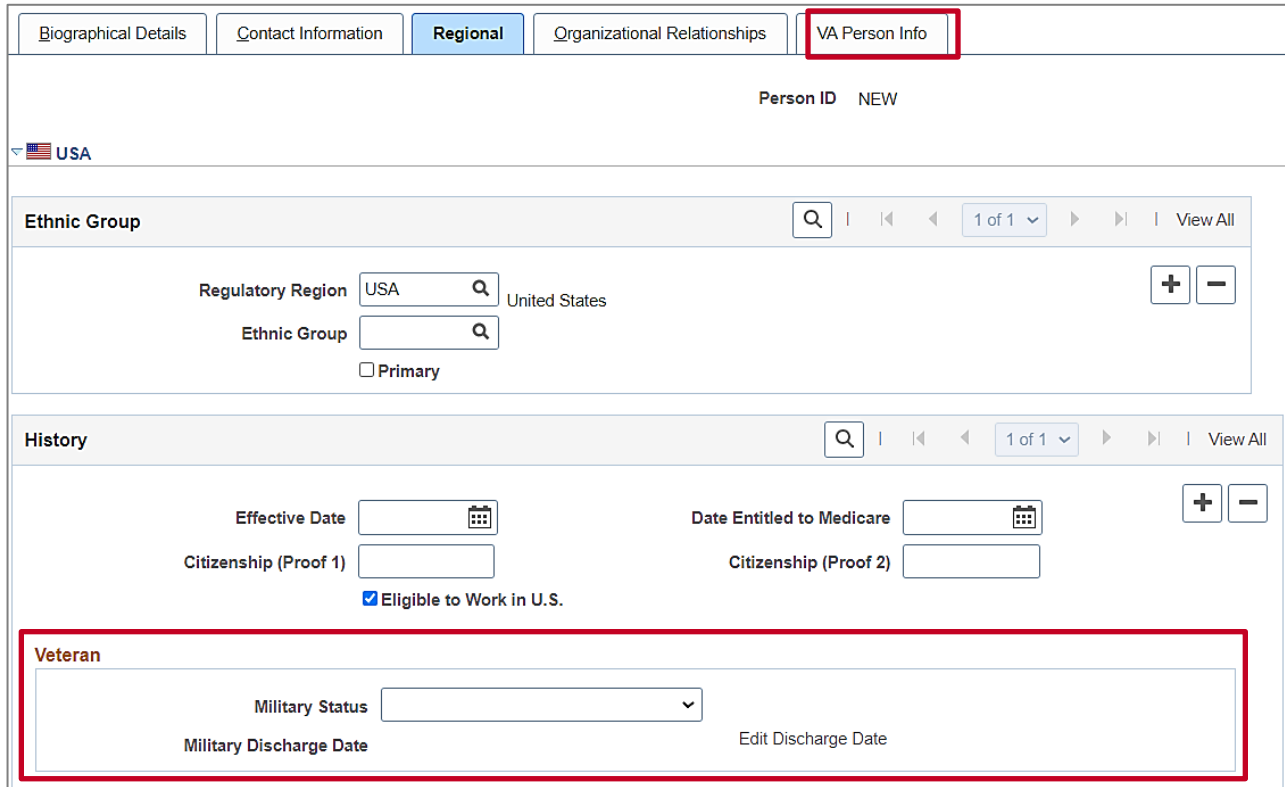
Address Type	As Of Date	Status	Address			
Home	11/05/2020	A	101 Main Street Richmond, VA 23234	Edit/View Address Detail	+	-

The 'Phone Information' table is as follows:

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

44. Scroll back up to the top of the page and click the **Regional** tab.

The **Regional** tab displays.



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

Person ID NEW

USA

Ethnic Group [Search] | 1 of 1 | View All

Regulatory Region USA [Search] United States [Add] [Remove]

Ethnic Group [Search]

Primary

History [Search] | 1 of 1 | View All

Effective Date [Calendar] Date Entitled to Medicare [Calendar] [Add] [Remove]

Citizenship (Proof 1) [Text] Citizenship (Proof 2) [Text]

Eligible to Work in U.S.

Veteran

Military Status [Dropdown]

Military Discharge Date [Text] Edit Discharge Date

45. The fields within the **Ethnic Group** are both optional. The **Regulatory Region** field defaults to “USA”. Do not change.

46. Select the employee’s **Ethnic Group**.

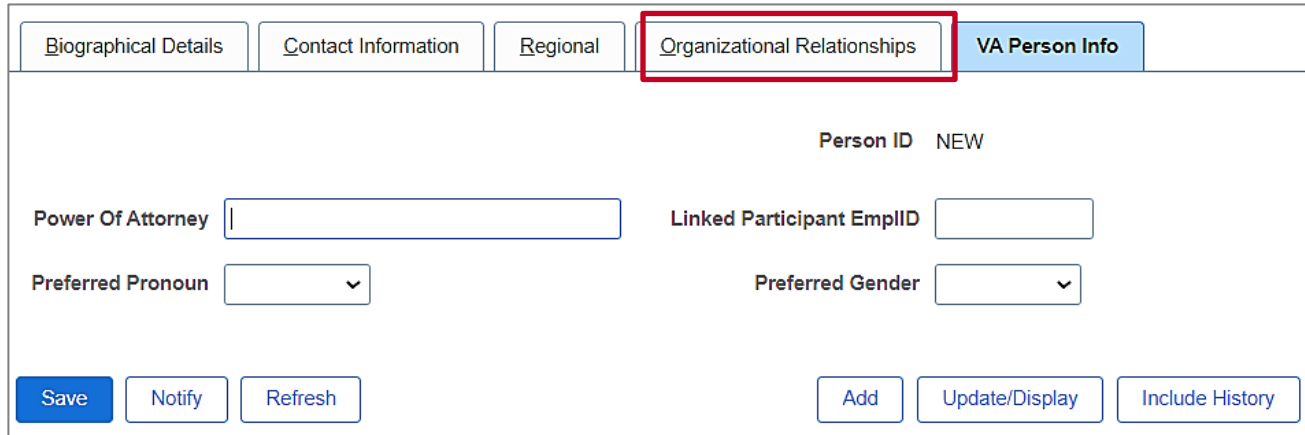
Note: If the employee identifies with multiple ethnic groups, click the **Add a New Row** icon (+) and repeat this step.

47. If the employee provided their military status and service documentation, scroll down as needed, click the **Military Status** dropdown button, and select the applicable value.

Note: The **Military Status** field is used to provide reporting information to Veteran’s Services.

48. The remaining sections on this tab are not currently being utilized in Cardinal. Click the **VA Person Info** tab.

The **VA Person Info** tab displays.



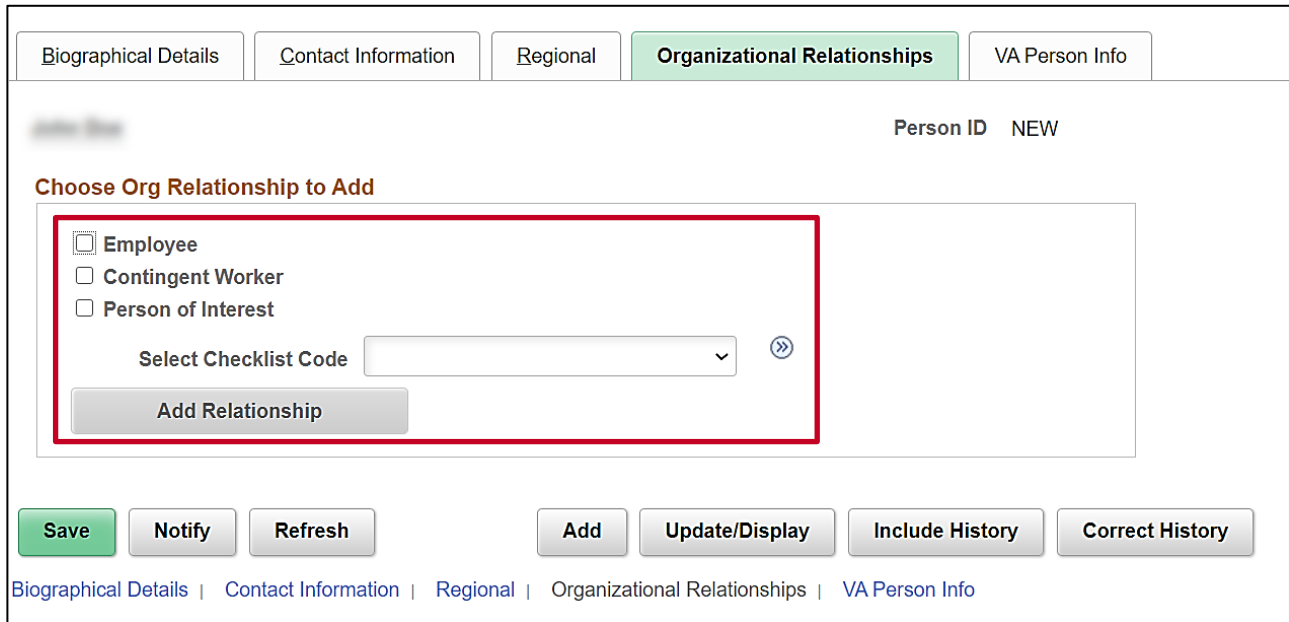
The screenshot shows a web application interface with a tabbed menu at the top. The tabs are: Biographical Details, Contact Information, Regional, Organizational Relationships (highlighted with a red box), and VA Person Info. Below the tabs, the 'VA Person Info' section is visible. It includes a 'Person ID' field with the value 'NEW'. There are four main input fields: 'Power Of Attorney' (text input), 'Linked Participant EmplID' (text input), 'Preferred Pronoun' (dropdown menu), and 'Preferred Gender' (dropdown menu). At the bottom of the form, there are six buttons: 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', and 'Include History'.

49. 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.

50. If the employee is linked to another employee of the Commonwealth of Virginia, enter that employee ID in the **Linked Participant EmplID** field.
51. Select the **Preferred Pronoun** provided by the employee.
52. Select the **Preferred Gender** provided by the employee.
53. Click the **Organizational Relationships** tab.

The **Organizational Relationships** tab displays.



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

Note: The **Hire** checklist appears in the **Select Checklist Code** field after select the **Employee** checkbox.

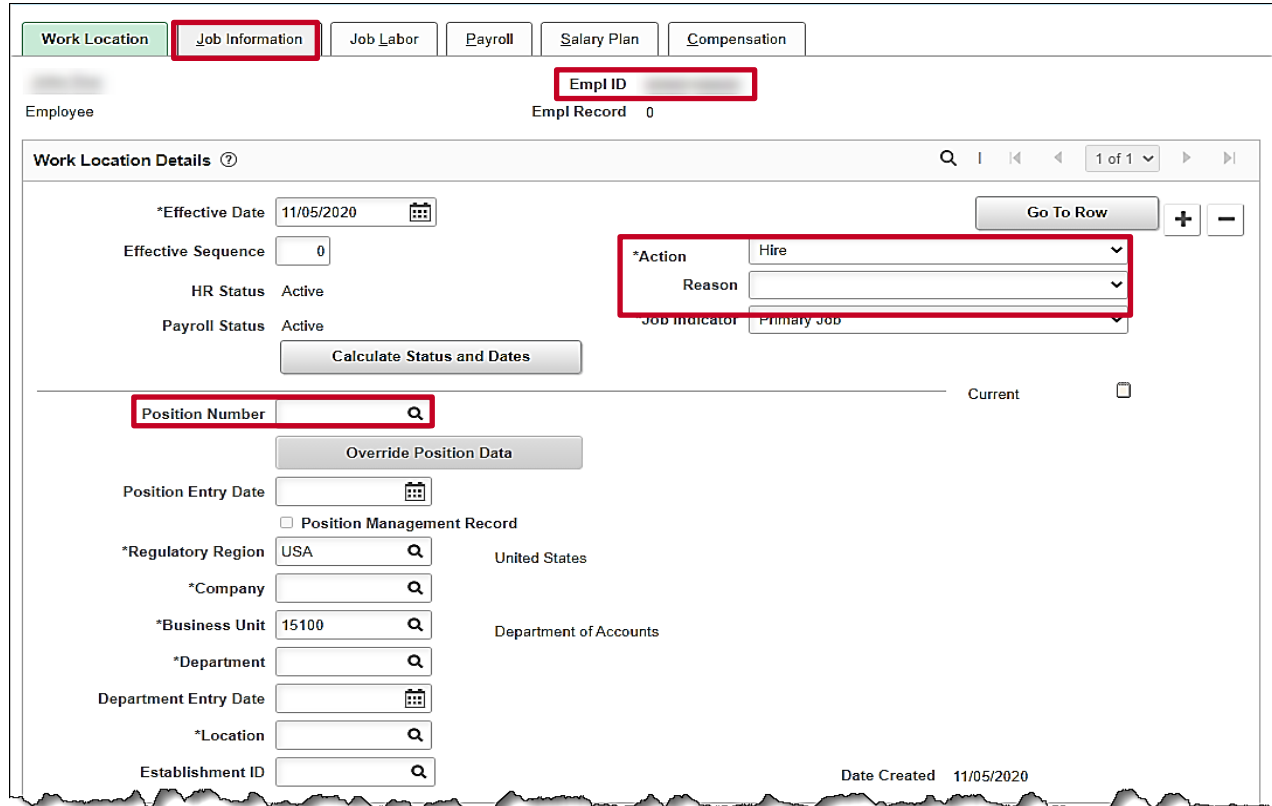
55. Click the **Add Relationship** button.

Note: This is the step where information entered for the employee's personal data is validated. If there is any missing required information, Cardinal will alert you at this point.

DO NOT CLICK THE BACK BUTTON IN YOUR BROWSER TO GO BACK; YOU WILL LOSE THE INFORMATION YOU ENTERED AND WILL HAVE TO START FROM THE BEGINNING.

Review the message and go to the tab where the missing information is captured and enter it before coming back to the **Organizational Relationships** tab and clicking the **Add Relationship** button again.

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



The screenshot displays the 'Work Location Details' page in the Cardinal HR system. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Job Information' tab is selected. Below the tabs, the 'Employee' name is partially visible, and the 'Empl ID' field is highlighted with a red box. The main section is titled 'Work Location Details' and contains several fields:

- *Effective Date: 11/05/2020
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire (highlighted with a red box)
- Reason: (dropdown menu, highlighted with a red box)
- Job Indicator: Primary Job
- Position Number: (input field with search icon, highlighted with a red box)
- *Regulatory Region: USA
- *Company: (input field with search icon)
- *Business Unit: 15100
- *Department: (input field with search icon)
- *Location: (input field with search icon)
- Establishment ID: (input field with search icon)

 The 'Date Created' is 11/05/2020. There are also buttons for 'Go To Row', 'Calculate Status and Dates', and 'Override Position Data'.

Note: Cardinal will auto-assign the **Employee ID** Number. It is located at the top of the **Work Location** tab.

56. The **Effective Date** field defaults to the date entered on the **Personal Information** page. If this date is not the first date of employment for the employee, you can update it now.

Note: A help desk ticket is required to adjust the new employee's effective date after their Job Record is saved.

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

58. Click the **Reason** dropdown button and select "New Hire".

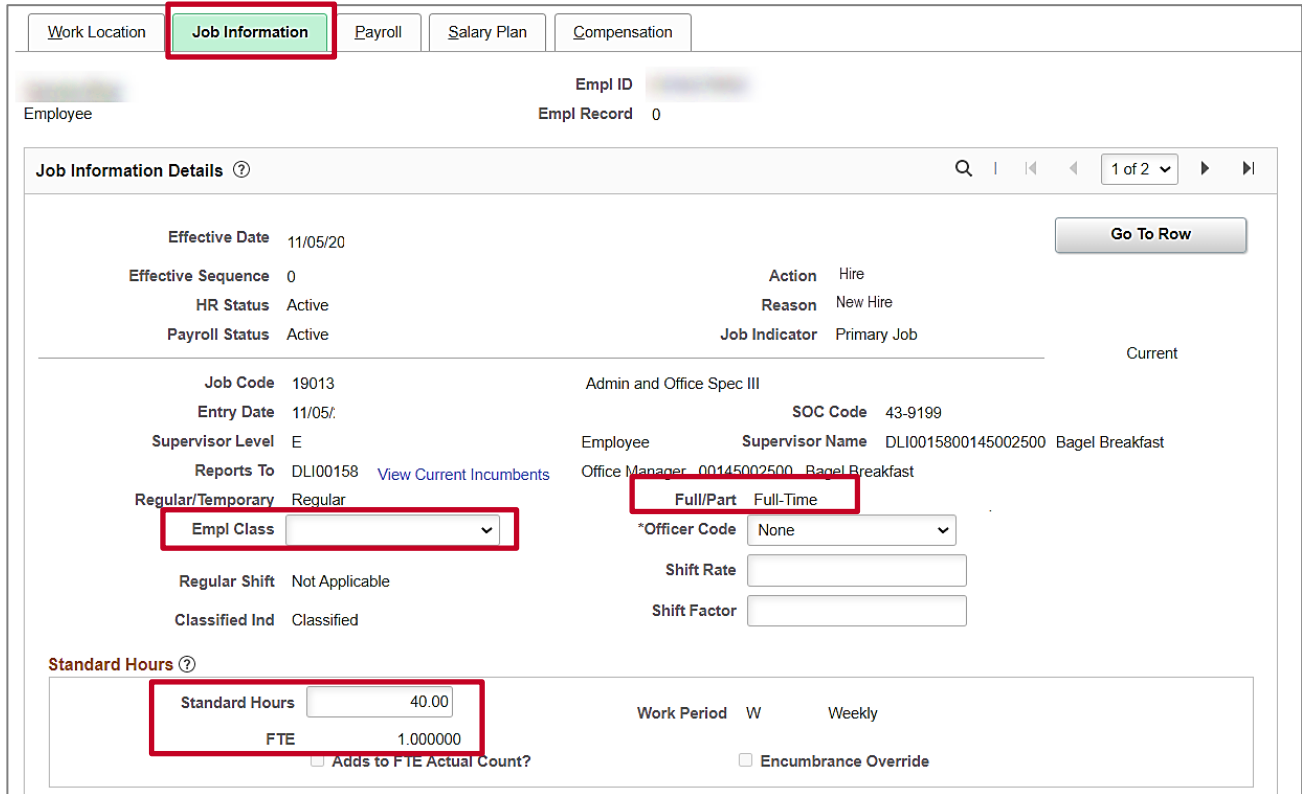
Note: If processing an Inter-Agency Transfer for the employee, use the applicable Transfer In (XXX) **Reason** code. For further information on inter-agency transfers, see the Job Aid titled **HR351_ Managing an Inter-Agency Transfer**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

59. Enter the employee's **Position Number**.

Note: The remaining position related fields on this page will auto-populate once the Position Number is entered and you tab out of the **Position Number** field.

60. Click the **Job Information** tab.

The **Job Information** tab displays.



The screenshot shows the 'Job Information' tab selected. The 'Job Information Details' section includes the following fields:

- Effective Date: 11/05/20
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Action: Hire
- Reason: New Hire
- Job Indicator: Primary Job
- Current:
- Job Code: 19013 (Admin and Office Spec III)
- Entry Date: 11/05/20
- SOC Code: 43-9199
- Supervisor Level: E
- Supervisor Name: DLI0015800145002500 Bagel Breakfast
- Reports To: DLI00158 (View Current Incumbents)
- Office Manager: 00145002500 Bagel Breakfast
- Regular/Temporary: Regular
- Empl Class: (highlighted with a red box)
- *Officer Code: None
- Shift Rate:
- Shift Factor:
- Regular Shift: Not Applicable
- Classified Ind: Classified
- Standard Hours: 40.00 (highlighted with a red box)
- FTE: 1.000000
- Work Period: W Weekly
- Encumbrance Override:

61. Review the information within the **Job Information Details** section. These values are populated when the Position Number is selected on the **Work Location** tab.

62. Click the **Empl Class** dropdown button and select the applicable Employee Class. This is a required field. For further information on selecting the appropriate employee classification, see the Job Aid titled **HR351_Employee Class Overview**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

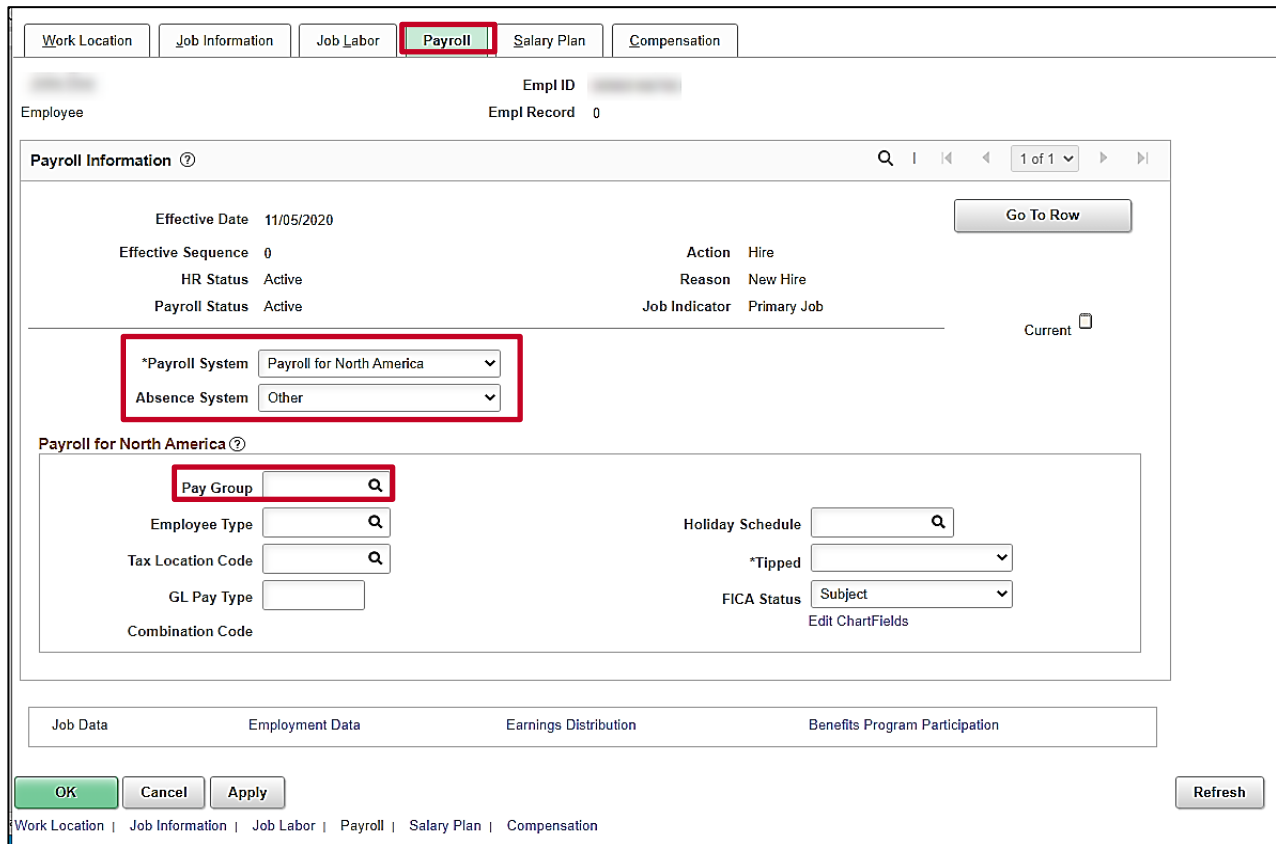
Note: The **Action/Reason**, **Employee Class**, and **Job Code** fields are key fields in the VRS file nightly extract from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if the incorrect data is entered.

63. The **Standard Hours** field defaults to 40. If the position is Part Time or Quasi, update the Standard Hours field to reflect the number of hours the employee will be working field (e.g., 34, 35, 36, etc.) and tab out of the field.

Note: The **FTE** field below will calculate after tabbing out of the **Standard Hours** field. The **Full/Part** field defaults based on the information entered for the position.

64. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

The **Payroll** tab displays.



The screenshot shows the 'Payroll Information' form in the Cardinal HR351 system. The 'Payroll' tab is active. The form displays the following information:

- Effective Date:** 11/05/2020
- Effective Sequence:** 0
- HR Status:** Active
- Payroll Status:** Active
- Action:** Hire
- Reason:** New Hire
- Job Indicator:** Primary Job
- *Payroll System:** Payroll for North America
- Absence System:** Other
- Pay Group:** (with a search icon)
- Employee Type:** (with a search icon)
- Tax Location Code:** (with a search icon)
- GL Pay Type:** (with a search icon)
- Combination Code:** (with a search icon)
- Holiday Schedule:** (with a search icon)
- *Tipped:** (with a dropdown arrow)
- FICA Status:** Subject

Buttons for 'OK', 'Cancel', 'Apply', and 'Refresh' are located at the bottom of the form.

65. The **Payroll System** field defaults to “Payroll for North America”. Do not change.

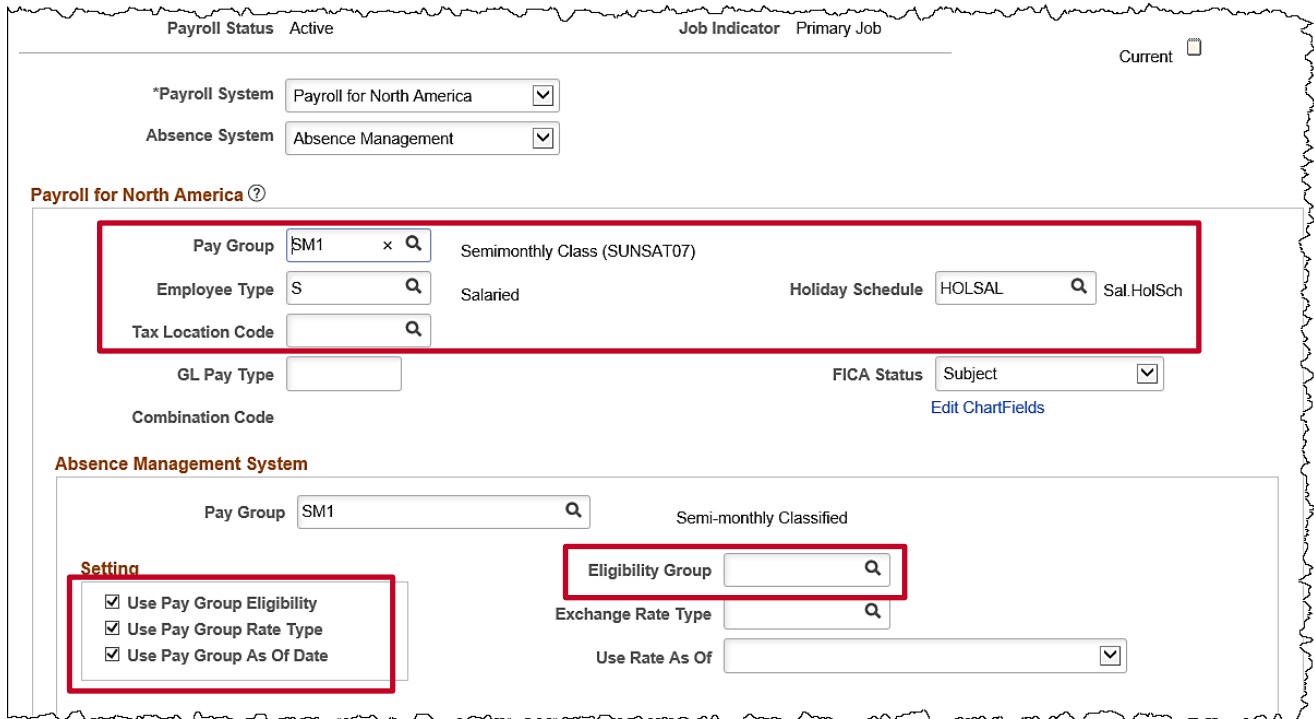
66. The **Absence System** field defaults to “Other”. If your Agency uses Cardinal Absence Management and the employee is salaried, click the **Absence System** dropdown button and select “Absence Management”. If your Agency uses any Absence Management system other than Cardinal Absence Management or if the employee’s Employee Class is “Wage”, keep the selection of “Other”.

67. Click the **Pay Group Look Up** icon within the **Payroll for North America** section and select the applicable Pay Group for the employee.

Note: The **FICA Status** field defaults to “Subject” for regular Social Security and Medicare tax withholdings. Update this value to:

- “Exempt” if the employee is exempt from both Social Security and Medicare tax withholdings
- “Medicare only” if the employee is only subject to Medicare tax withholdings

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



The screenshot shows a web form with the following sections and fields:

- Payroll Status:** Active
- Job Indicator:** Primary Job
- Current:**
- *Payroll System:** Payroll for North America (dropdown)
- Absence System:** Absence Management (dropdown)
- Payroll for North America** (Section Header)
 - Pay Group:** SM1 (dropdown with search icon) - Semimonthly Class (SUNSAT07)
 - Employee Type:** S (dropdown with search icon) - Salaried
 - Holiday Schedule:** HOLSAL (dropdown with search icon) - Sal.HolSch
 - Tax Location Code:** (dropdown with search icon)
 - GL Pay Type:** (dropdown)
 - FICA Status:** Subject (dropdown)
 - Combination Code:** (dropdown)
 - [Edit ChartFields](#)
- Absence Management System** (Section Header)
 - Pay Group:** SM1 (dropdown with search icon) - Semi-monthly Classified
 - Setting** (Section Header)
 - Use Pay Group Eligibility
 - Use Pay Group Rate Type
 - Use Pay Group As Of Date
 - Eligibility Group:** (dropdown with search icon)
 - Exchange Rate Type:** (dropdown with search icon)
 - Use Rate As Of:** (dropdown)

68. The **Employee Type** and **Holiday Schedule** fields default based on the Pay Group selection. If “Absence Management” is selected, the **Pay Group** field within the **Absence Management System** section auto-populates based on the Pay Group previously selected in the **Payroll for North America** section.

69. Click the **Tax Location Code Look Up** icon and select the applicable code based on the location of the employee’s office.

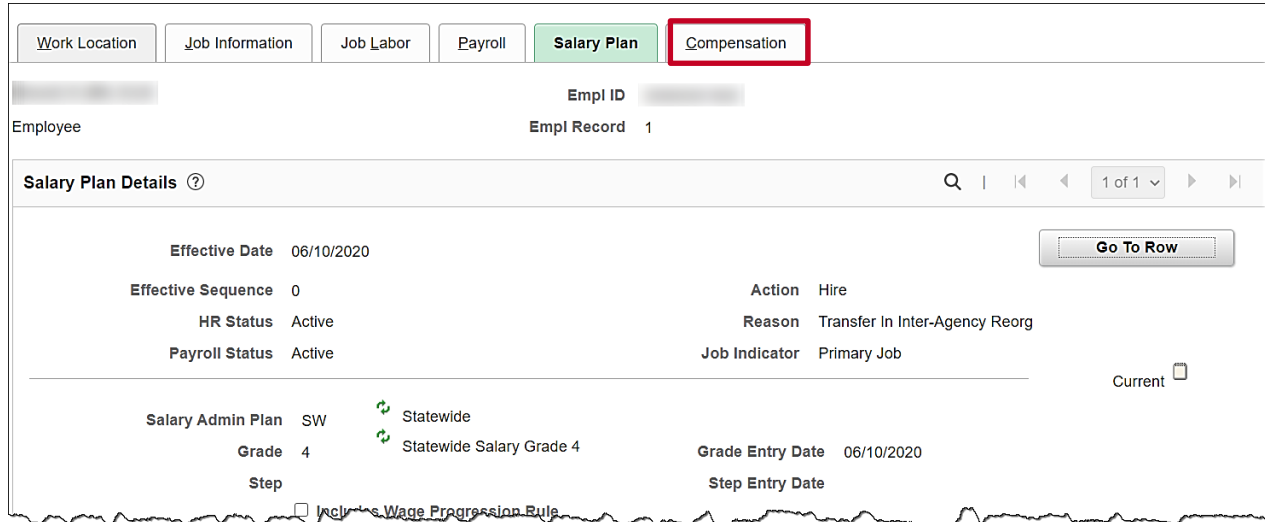
70. The **Use Pay Group Eligibility** checkbox option is selected by default. De-select this checkbox option.

71. Click the **Eligibility Group Look Up** icon and select the applicable Eligibility Group for the employee.

Note: For further information on updating the Eligibility Group, see the Job Aid titled **TA374_Absence Management Leave Types and Eligibility**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

72. Scroll up to the top of the page as needed and click the **Salary Plan** tab.

The **Salary Plan** tab displays.



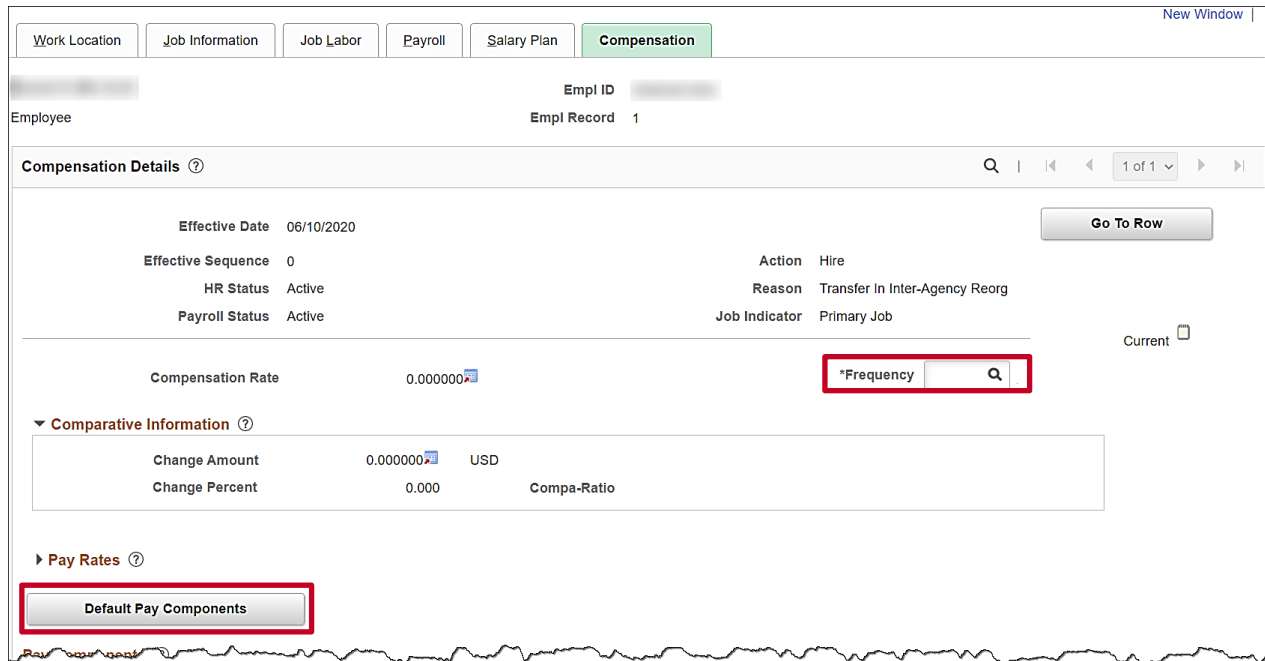
Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
Employee [Redacted] Empl ID [Redacted]					
Empl Record 1					
Salary Plan Details ?					
Effective Date	06/10/2020	Go To Row			
Effective Sequence	0	Action	Hire		
HR Status	Active	Reason	Transfer In Inter-Agency Reorg		
Payroll Status	Active	Job Indicator	Primary Job		
Salary Admin Plan	SW	Statewide	Current <input type="checkbox"/>		
Grade	4	Statewide Salary Grade 4	Grade Entry Date	06/10/2020	
Step			Step Entry Date		
<input type="checkbox"/> Includes Wage Progression Rule					

73. Review the Salary Plan information. This information comes from the position.

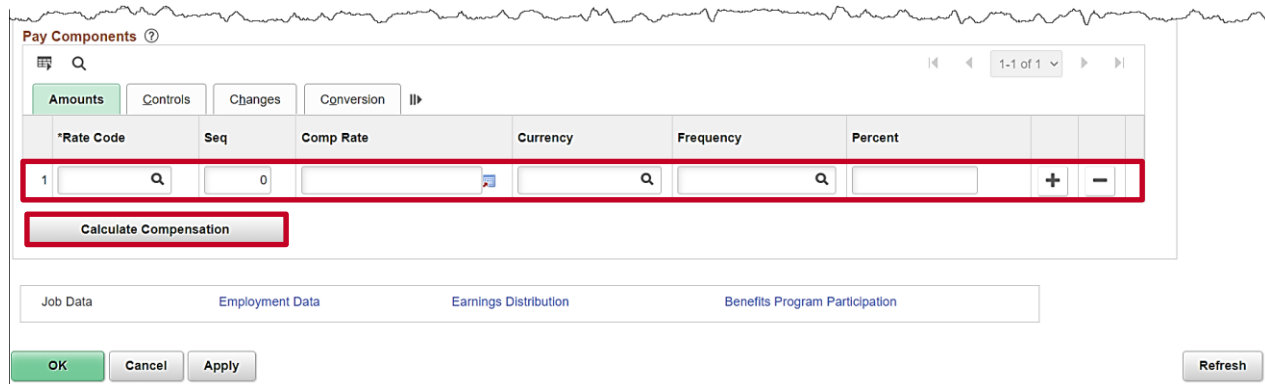
Note: If the Salary Plan information is incorrect, cancel the action and make corrections to the Position before assigning the employee to the Position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion. For further information on updating Position Data, 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**.

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

The **Compensation** tab displays.



75. Enter the employee's pay frequency in the **Frequency** field. (E.g., **S** for Semimonthly; **H** for Hourly).
 76. Click the Default Pay Components button.
 77. Scroll down to the **Pay Components** section as needed.
- The **Pay Components** section displays.

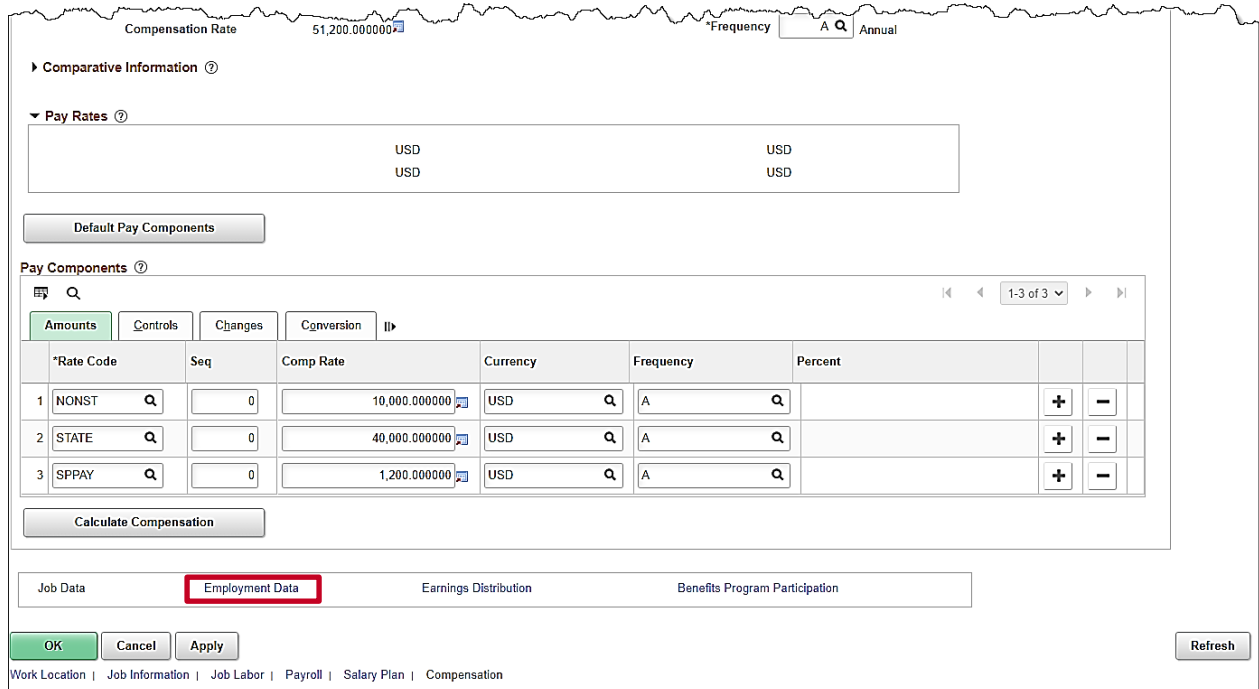


78. Select the applicable **Rate Code**.
79. Enter the compensation to pay the employee (Annual Salary or Hourly Rate) in the **Comp Rate** field.
80. The **Currency** and **Frequency** fields default based on the Rate Code selected.

Note: If multiple Rate Codes need to be entered, click the **Add a New Row** icon and repeat steps 73 – 74.

81. Click the Calculate Compensation button.

The **Compensation** tab refreshes.



Compensation Rate 51,200.000000 *Frequency A Annual

► Comparative Information ⓘ

▼ Pay Rates ⓘ

USD	USD
USD	USD

Default Pay Components

Pay Components ⓘ

Amounts Controls Changes Conversion

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1 NONST	0	10,000.000000	USD	A		+	-
2 STATE	0	40,000.000000	USD	A		+	-
3 SPPAY	0	1,200.000000	USD	A		+	-

Calculate Compensation

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

OK Cancel Apply Refresh

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

82. Click the **Employment Data** link at the bottom of the page.

The **Employment Information** page displays.

Employment Information

Employee

Empl ID

Empl Record 0

Organizational Instance ?

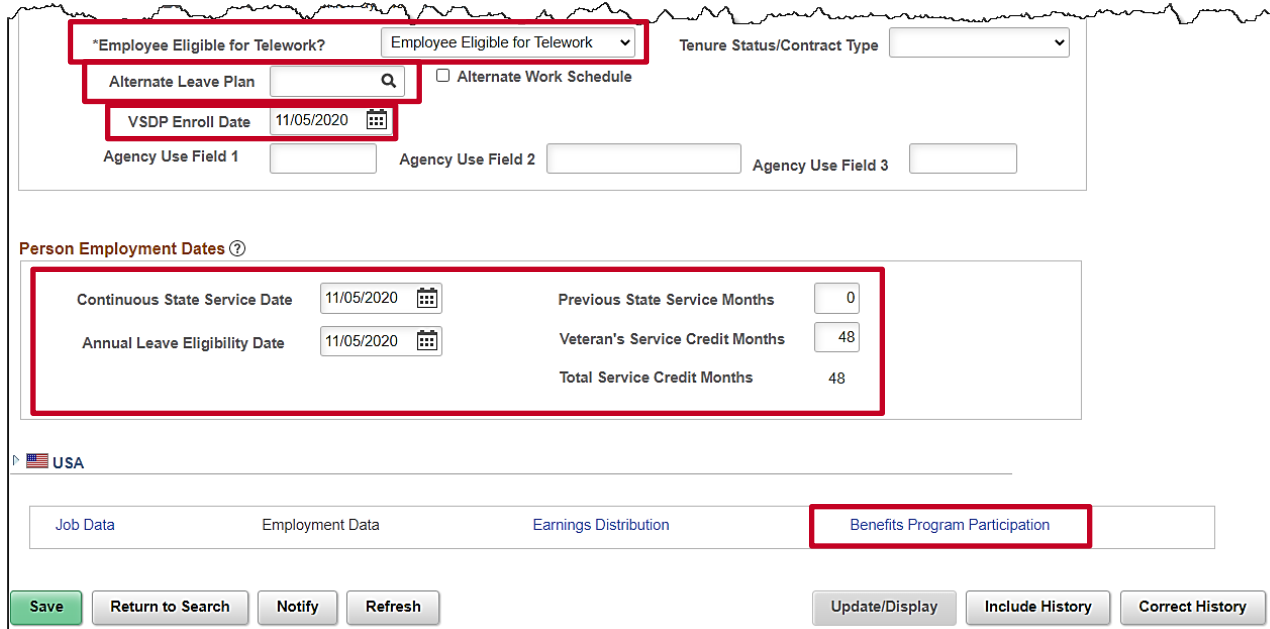
Organizational Instance Rcd	0		Original Start Date	11/05/2020		<input type="checkbox"/> Override
Last Start Date	11/05/2020		First Start Date	11/05/2020		
Termination Date					Years Months Days	
Org Instance Service Date	11/05/2020	<input type="checkbox"/> Override	↻	2	4	1

Organizational Assignment Data ?

Instance Record

Last Assignment Start Date	11/05/2020		First Assignment Start	11/05/2020		
Assignment End Date						
Home/Host Classification	Home			Years	Months	Days
Company Seniority Date	11/05/2020	<input type="checkbox"/> Override	↻	2	4	1
Benefits Service Date	11/05/2020	<input type="checkbox"/> Override	↻	2	4	1
Seniority Pay Calc Date	11/05/2020	<input type="checkbox"/> Override	↻	2	4	1
VSDP Sick/PER Leave Effct Date	11/05/2024			0	0	0
Probation Date	11/04/2021					Time Reporter Data
						Last Verification Date

83. If the employee is a Classified new hire employee, click the **Probation Date Calendar** icon and select the date one year from the hire/rehire date, if applicable.
84. Scroll down on the page.



The screenshot shows a web-based form for entering employee data. Key sections include:

- Employee Eligibility:** A dropdown menu for "Employee Eligible for Telework?" is highlighted with a red box. Below it are fields for "Alternate Leave Plan" (with a search icon) and "Alternate Work Schedule" (checkbox).
- Enrollment:** The "VSDP Enroll Date" field is set to 11/05/2020 and is highlighted with a red box.
- Person Employment Dates:** A section containing:

Continuous State Service Date	11/05/2020	Previous State Service Months	0
Annual Leave Eligibility Date	11/05/2020	Veteran's Service Credit Months	48
		Total Service Credit Months	48
- Navigation:** A tabbed interface at the bottom shows "Benefits Program Participation" as the active tab, highlighted with a red box. Other tabs include "Job Data", "Employment Data", and "Earnings Distribution".
- Actions:** Buttons for "Save", "Return to Search", "Notify", "Refresh", "Update/Display", "Include History", and "Correct History" are visible at the bottom.

Note: Before recording the employee’s telework status, the Agency HR administrator should verify and/or update the following if the employee will be teleworking:

85. The **Available for Telework** field = “Yes” on the employee’s Position Record.

Note: For further information on selecting the appropriate telework option, see the Job Aid titled **HR351_Managing Employee Teleworker Data**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

86. Click the **Employee Eligible for Telework** dropdown button and select the applicable value based on the employee’s eligibility for telework.
87. If your agency does not use Cardinal Absence Management, the **Alternate Leave Plan** field must be completed based on the employee's leave program (i.e., VSDP Elig Group) in order for the employee to have a complete Total Compensation statement in Cardinal ESS.
- 88.
89. Enter the enrollment date in the **VSDP Enroll Date** fields. This field is provided to VNAV and is used by the VSDP vendor to determine the program enrollment date.
90. Enter the **Continuous State Service Date** and select the employee’s hire/rehire date. This field is used to determine the employee’s eligibility for legislative pay increases for all salaried employees, as well as severance, and benefits at layoff for VPA covered employees (if applicable).
91. If the employee has any previous State service months (rehires only), enter the applicable number of months of previous State service in the **Previous State Service Months** field. Use the

HR351_Managing Service Dates Calculator when the employee has prior State service or Veteran's Service Credit Months.

92. If the employee has any veteran service and has provided their military service documentation (DD214), enter the applicable number of veteran's service months in the **Veteran's Service Credit Months** field.
93. The **Total Service Credit Months** field is a read-only field. It is auto populated as the sum of the veteran's service credit months and the previous State service months. It is used to determine the annual leave eligibility date when there is a break in service or veteran's service applies. The annual leave accrual is determined by using prior State service and veteran's service in the military, National Guard, or Reserves.
94. Enter the **Annual Leave Eligibility Date** and select either:
 - The employee's hire date if they have no prior State service or veteran's service credit months
 - The calculated Annual Leave Eligibility Date that you determined using the **HR351_Managing Service Dates Calculator** (if the employee has prior State service or veteran's service credit months)

Note: The **Annual Leave Eligibility Date** field must be updated for all VPA covered employees and salaried employees for agencies that use Cardinal's Absence Management. This field auto-populates the **Company Seniority Date** field. For a detailed description of the date fields on the **Employment Information** page, refer to the Job Aid titled **HR351_Managing Service Dates and Breaks in Service**. This Job Aid can be found on the Cardinal website in the **Job Aids** under **Learning**.

95. Click the **Benefits Program Participation** link.

The **Benefits Program Participation** page displays.

Benefit Program Participation

Employee
Empl ID [redacted]
Empl Record 0

Benefit Status ?
Q | < > 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 v

Annual Benefits Base Rate USD

Current ☐

Benefits Employee Status Active

Benefits Administration Eligibility ?
Q | < > 1 of 1 >

BAS Group ID Q

Elig Fld 1 Q

Elig Fld 2 Q

Elig Fld 3 Q

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8 Q

Elig Fld 9 Q

Benefit Program Participation Details ?
Q | < > 1 of 1 > | View All

*Effective Date 11/05/2020 📅

*Benefit Program Q

Currency Code + -

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

OK
Cancel
Apply

96. Complete **Elig Fld 2**, **Elig Fld 3**, **Elig Fld 8** and **Elig Fld 9**.

Note: For further information on the 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**.

- **Elig Fld 2** - 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).
- **Elig Fld 3** - select who will be entering time for the employee.
- **Elig Fld 8** - select the applicable pay frequency (i.e., salaried is 12-24 and hourly is 12-26).

- **Elig Fld 9** - select the applicable value. 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).

Note: Do not make any updates to the **Benefit Program Participation Details** section.

97. Review all the information entered for the employee using the **Job Data** link at the bottom of the page to go back through the tabs. Update anything that is entered incorrectly.

98. Click the **OK** button to save the hire in Cardinal.

Note: Once the record is saved, if anything is incorrect a help desk ticket must be entered to make the correction. If any of the following fields are blank, a warning message will display: **Elig Fld 2, Elig Fld 3, Elig Fld 8 & Elig Fld 9.**

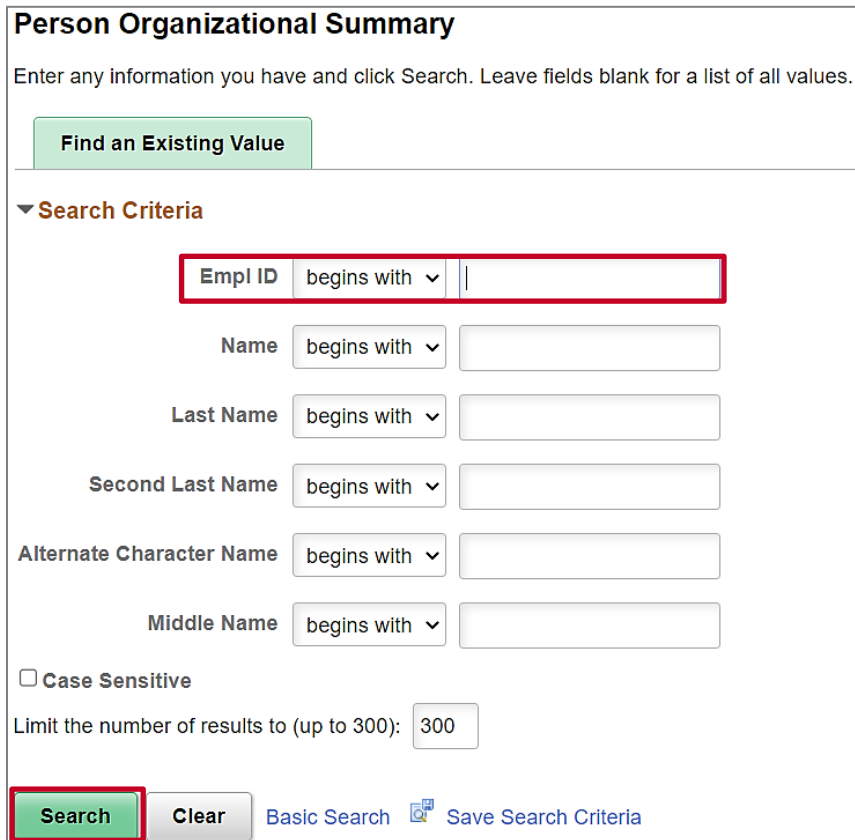
99. Continue to the [Agency Next Steps After Entering New Hire](#) section of this Job Aid.

Hiring a Person When Personal Data (Employee ID) Exists in Cardinal

There are times when only personal data exists in Cardinal for a person. When this is the case, only the person's name and Employee ID will display on the Person Organizational Summary page. To complete the hire, the person must be hired by creating a new employment instance to create an employee record.

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

Menu > Workforce Administration > Personal Information > Person Organizational Summary



Person Organizational Summary

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 ▾

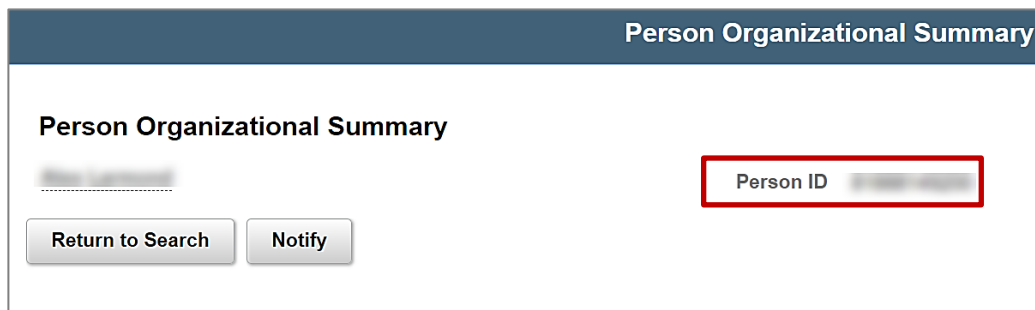
Case Sensitive

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

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

The **Person Organizational Summary** page displays.

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



Person Organizational Summary

Person ID [blurred]

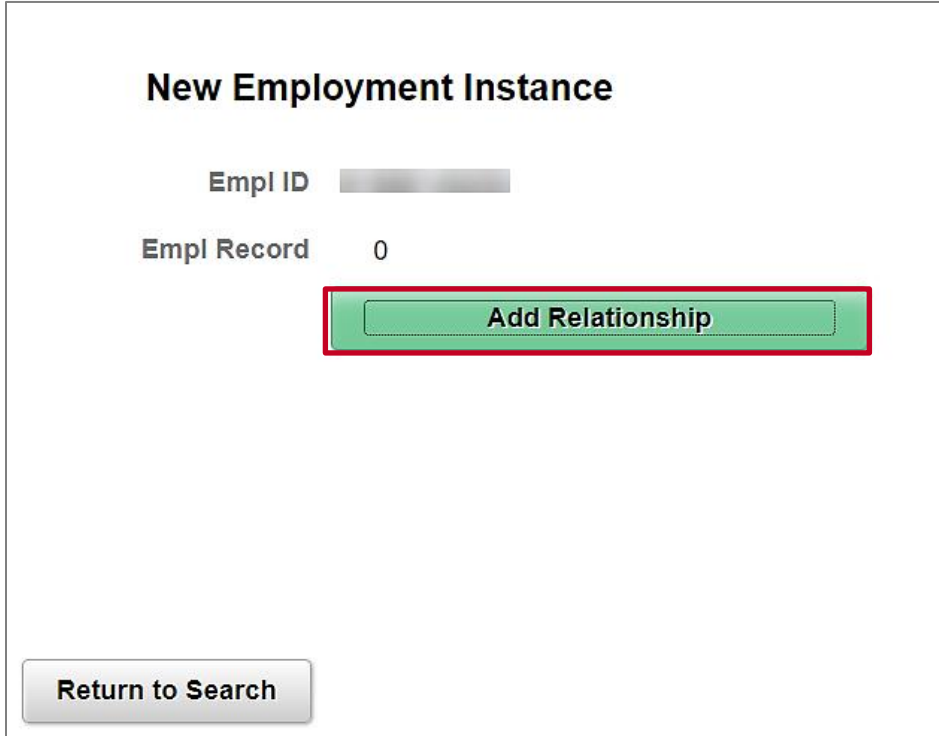
Return to Search **Notify**

3. Copy the Employee ID from the **Person ID** field.

4. Navigate to the **Add Employment Instance** page using the following path:

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

The **New Employment Instance** page displays.



New Employment Instance

Empl ID

Empl Record 0

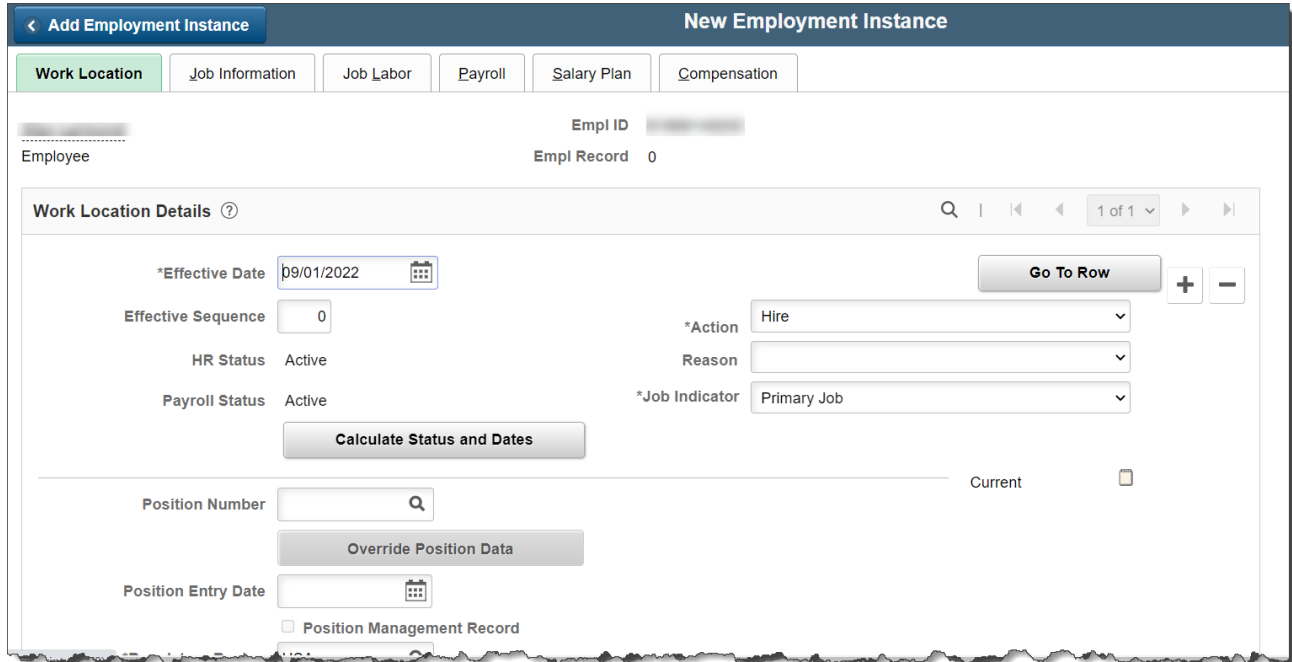
Add Relationship

Return to Search

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.

The **New Employment Instance** page displays with the **Work Location** tab displayed by default.



The screenshot shows the 'New Employment Instance' page with the 'Work Location' tab selected. The page includes a navigation bar with tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below the navigation bar, there are fields for 'Empl ID' and 'Empl Record' (0). The main section is titled 'Work Location Details' and contains several input fields and dropdown menus: '*Effective Date' (09/01/2022), 'Effective Sequence' (0), 'HR Status' (Active), 'Payroll Status' (Active), '*Action' (Hire), 'Reason', '*Job Indicator' (Primary Job), and 'Position Number'. There are also buttons for 'Go To Row', 'Calculate Status and Dates', and 'Override Position Data'. A 'Position Management Record' checkbox is visible at the bottom.

6. Complete the hire as detailed in the [Add a New Hire](#) section of this Job Aid.

Agency Next Steps After Entering the New Hire

- Be sure to enter/review the employee's citizenship, update the employee's personal data, and add telework agreement if one has been established/approved.
 - For further information on entering citizenship information, updating personal data and telework agreement, see job aids titled, **HR351 Viewing and Modifying Personal Data** and **HR351 Maintain Employee Teleworker Data**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.
- If your agency requires the Employee Activity Report to be placed in the personnel file, be sure to run the **Employee Activity Report**. This report can be found in the **Cardinal HCM Human Resources Reports Catalog**. The reports catalog can be found on the Cardinal website in **Reports Catalog** under **Resources**.
- Communicate with the employee to complete state and federal withholding forms, direct deposit elections, etc. per established business practices. If tax withholding paperwork is not collected and entered prior to the first payroll period, withholdings will default to single and zero. State taxes default to VA.
- Coordinate with agency Benefits Administrators to ensure that eligible employees complete their benefit elections (within 3 days per OHB policy)
 - For further information on completing benefit elections, see job aid titled, **BN361_ Completing a New Hire Enrollment**. These job aids can be found on the Cardinal website in **Job Aids** under **Learning**.
- Coordinate with agency Time and Labor (TL) Administrators to ensure that all employees are assigned the applicable Work Schedule (can be assigned by either a TL Administrator or the employee's supervisor) and review their TA eligibilities (i.e., overtime, comp leave, etc.)
 - For further information on assigning work schedules, see Job Aid titled, **TA_Maintaining Employee Work Schedules**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.