

Overview of the Employee Position Report (EPR) Tool

The **Cardinal Employee Position Reports (EPR) Tool** is used to report staffing levels by type of funding across a broad diversity of executive, legislative, judicial, and independent Agencies, colleges, and universities.

EPR uses retrospective monthly reporting and is always one month behind the calendar month. This means the month must have ended before EPR reporting activities can begin. EPR reporting must be completed in the EPR tool by the 15th day of the next calendar month (ex: reporting for February must be completed by March 15). The 25th of each month is DHRM's default run date for the EPR program and to open the EPR Tool.

On the EPR Agency record, the high-level staffing rollups are for Classified, Faculty, and Wage. Within each high-level staffing rollup, there are separate count areas for Employees (FTE's), Positions, and Head Counts. There are count areas for types of funding whether General (GF) or Non-General (NGF) and Restricted or Non-Restricted Funding. For the Wage breakouts, there are count areas only for General Fund versus Non-General Fund.

Users with the responsibility of verifying and certifying EPR will require the security **V_HR_EPR_ONLY** role.

Validating and Updating Employee and Position Counts

This Job Aid details the reports, queries, and steps utilized to assist in troubleshooting issues after verifying and certifying the EPR. Details to run each of the following reports and queries are included in the Cardinal Human Resources Reports Catalog. The Cardinal Reports Catalogs are available on the Cardinal website under **Resources**.

- Position Summary Report (VHRR0471)
- Employee Position Report (VHRR0019)
- V_HR_POSITION_DATA Query
- V_HR_POSN_DFLT_EMPL_DATA Query

The information provided in the reports and queries are Agency specific. Work with your Agency payroll and finance departments to determine which funding buckets employees are paid from.

It is important that questions come to DHRM iHelp as soon they arise so that assistance can be provided in a timely manner. Questions received on the day of the reporting deadline may not be resolved promptly, which could cause gaps in reporting and Agency funding.

Other information that can be helpful in this process are the HR351_Managing Position Data Job Aid and the HR351_Position ChartField Assignment and Update Job Aid. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.

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

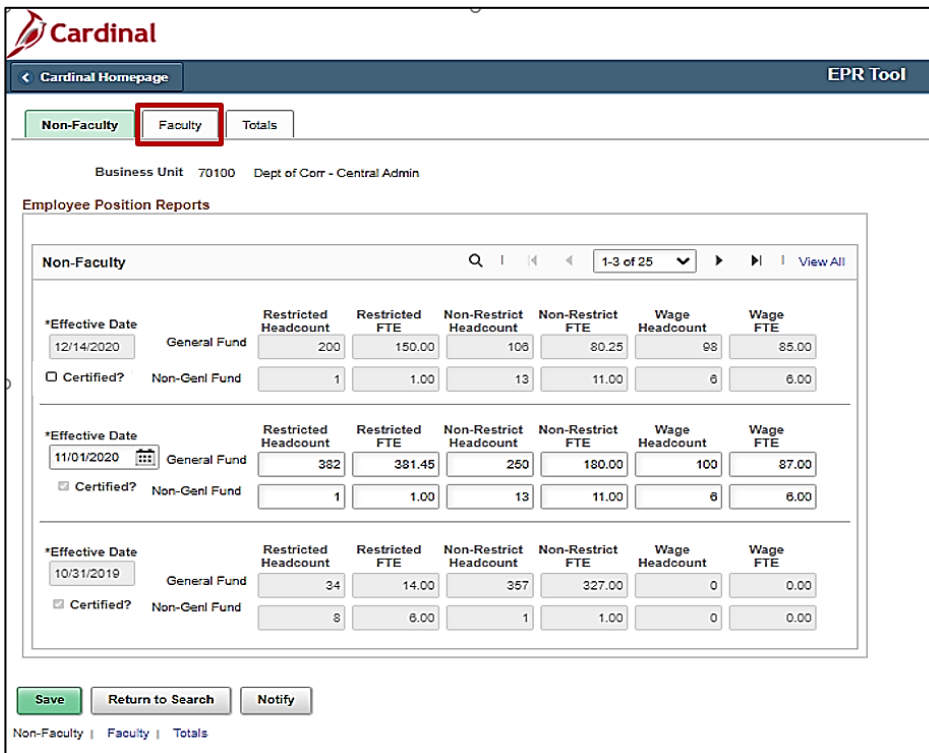
Verifying and Certifying Employee Positions	4
Troubleshooting Tools for the Employee Position Report.....	7
V_HR_POSITION_DATA Query.....	8
V_HR_POSN_DFLT_EMPL_DATA Query	9
Employee Position Report (VHRR0019).....	10
Position Summary Report (RHR471).....	11
Updating the Employee Position Report.....	12

Verifying and Certifying Employee Positions

1. Navigate to the **EPR Tool** page using the following path:

Navigator > Workforce Administration > EPR Tool

The **EPR Tool** page displays with the **Non-Faculty** tab displayed by default.



Business Unit 70100 Dept of Corr - Central Admin

Employee Position Reports

Non-Faculty

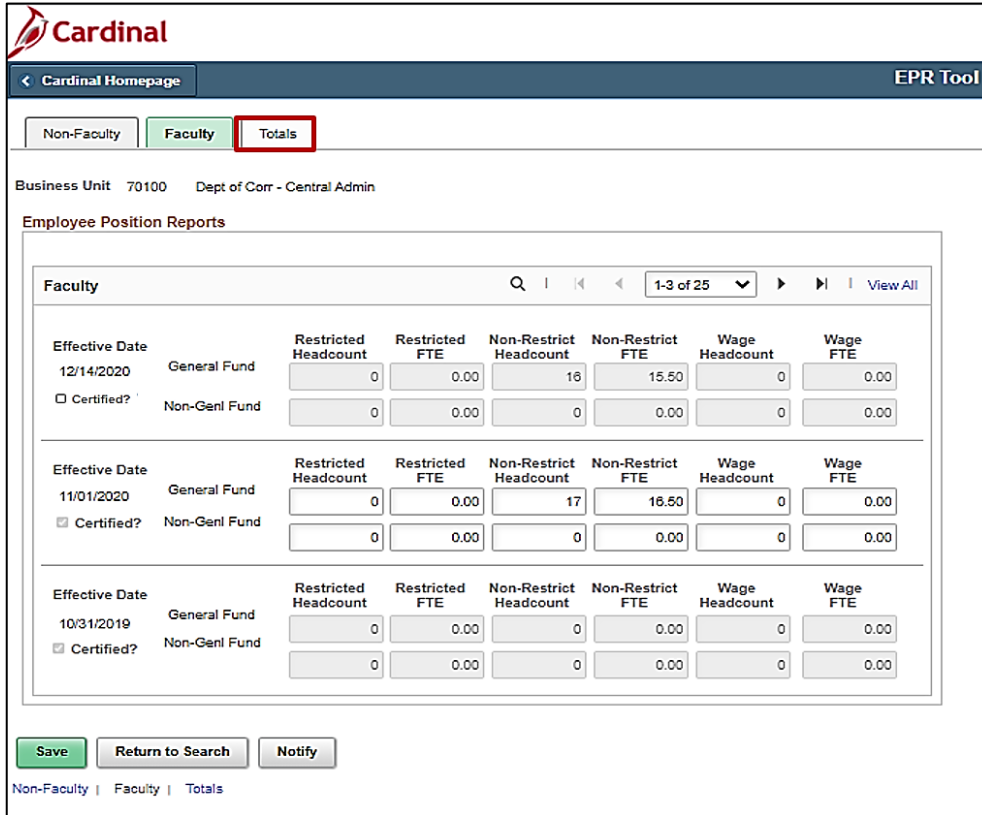
*Effective Date	General Fund	Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020	<input type="checkbox"/> Certified?	200	150.00	108	80.25	98	85.00
	Non-Genl Fund	1	1.00	13	11.00	8	6.00
11/01/2020	<input type="checkbox"/> Certified?	382	381.45	250	180.00	100	87.00
	Non-Genl Fund	1	1.00	13	11.00	8	6.00
10/31/2019	<input checked="" type="checkbox"/> Certified?	34	14.00	357	327.00	0	0.00
	Non-Genl Fund	8	6.00	1	1.00	0	0.00

Save Return to Search Notify

Note: The Non-Faculty and Faculty totals will auto-populate the **Totals** page. After the EPR Run Control process is completed, the current row will be displayed, and the **Certified** checkbox option will not be checked.

2. Validate that the expected reporting month is displayed as the top row of data.
3. Validate that the **Certified** checkbox option is not checked.
4. If your Agency has Non-Faculty and/or Waged employees, verify that the information is correct.
5. If the information is not correct, refer to the [Troubleshooting Tools for the EPR Report](#) section of this Job Aid for tips on troubleshooting.
6. If your Agency has Faculty employees, click the **Faculty** tab.

The **Faculty** tab displays.



The screenshot shows the 'EPR Tool' interface with the 'Faculty' tab selected. The 'Totals' tab is highlighted with a red box. The interface displays 'Employee Position Reports' for 'Business Unit 70100 Dept of Corr - Central Admin'. The reports are grouped by 'Effective Date' and include columns for 'Restricted Headcount', 'Restricted FTE', 'Non-Restrict Headcount', 'Non-Restrict FTE', 'Wage Headcount', and 'Wage FTE'. A 'Certified?' checkbox is present for each report, and it is currently unchecked.

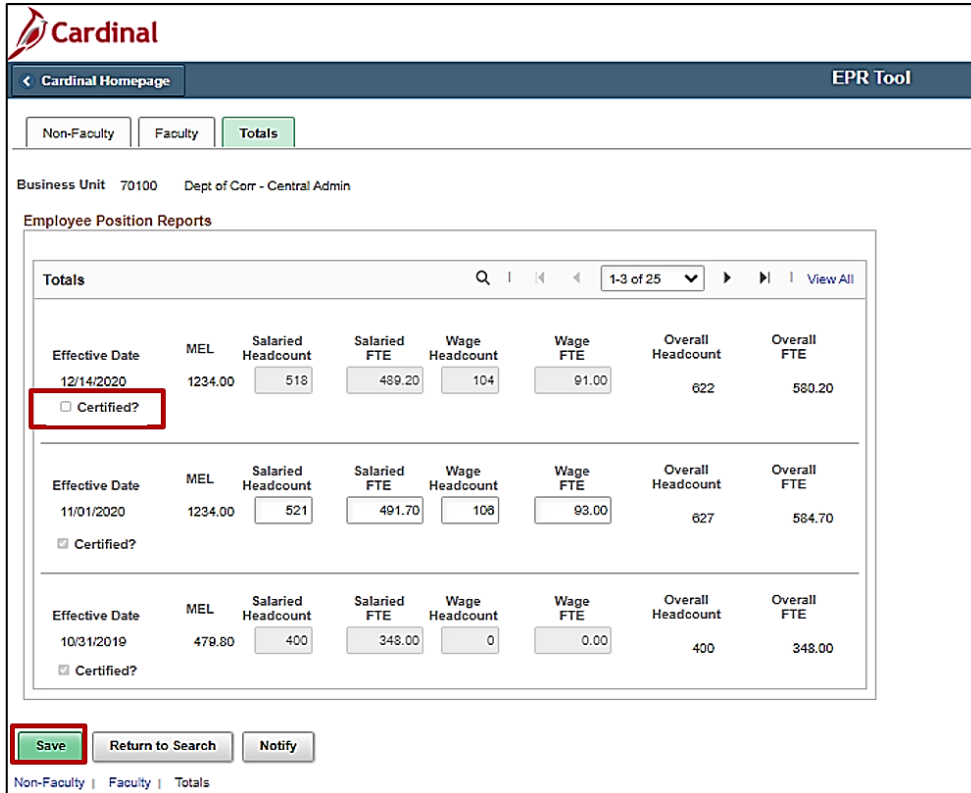
Effective Date	General Fund	Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020	<input type="checkbox"/> Certified?	0	0.00	16	15.50	0	0.00
	Non-Genl Fund	0	0.00	0	0.00	0	0.00
11/01/2020	<input checked="" type="checkbox"/> Certified?	0	0.00	17	16.50	0	0.00
	Non-Genl Fund	0	0.00	0	0.00	0	0.00
10/31/2019	<input checked="" type="checkbox"/> Certified?	0	0.00	0	0.00	0	0.00
	Non-Genl Fund	0	0.00	0	0.00	0	0.00

Buttons: Save, Return to Search, Notify

Navigation: Non-Faculty | Faculty | Totals

7. Validate that the **Certified** checkbox option is not checked.
8. Verify that the information is correct.
9. If the information is not correct, refer to the [Troubleshooting Tools for the EPR Report](#) section of this Job Aid for tips on troubleshooting.
10. Click the **Totals** tab.

The **Totals** tab displays.



Business Unit 70100 Dept of Corr - Central Admin

Employee Position Reports

Totals

Effective Date	MEL	Salaried Headcount	Salaried FTE	Wage Headcount	Wage FTE	Overall Headcount	Overall FTE
12/14/2020	1234.00	518	489.20	104	91.00	622	580.20
11/01/2020	1234.00	521	491.70	108	93.00	627	584.70
10/31/2019	479.80	400	348.00	0	0.00	400	348.00

Save Return to Search Notify

11. If the information is correct, click the **Certified** checkbox option on the **Non-Faculty**, **Faculty**, and **Totals** tabs (top row).
12. Click the **Save** button.

Note: Once the transaction is saved, the data cannot be uncertified or changed. Validate that all data is correct before clicking the **Save** button.

Troubleshooting Tools for the Employee Position Report

The information provided in the reports and queries are Agency specific. Work with your payroll and finance departments to determine which funding buckets employees are paid from and to resolve possible issues. It is important that questions come to DHRM iHelp as soon they arise so that assistance can be provided in a timely manner. Questions received on the day of the reporting deadline may not be resolved promptly, which could cause gaps in reporting and Agency funding.



V_HR_POSITION_DATA Query

Navigator > Reporting Tools > Query > Query Viewer

Note: Detailed screenshots on how to run the report can be found in the Cardinal Human Resources Reports Catalog.

Position Data Information 1885	Effective Date	Effective Status	Descr	Business Unit	Dept ID	Job Code	Status	Compan	Res	Full	Sal Plan	Grade	Position	Position	Action Date	Confid	File	Reports To	Location	Std Hours	FLSA Stat	FTE	Position
DJJB001	1/1/1901 A		Superintendent Senior	77700	50712	69117	A	DJJ	R	F	SW	6	POS	NEW	3/22/2022 N	1	DJJR0601	BAJCC	40.00 P		1.000000		
DJJB002	5/25/2022 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	RTC	6/8/2022 N	1	DJJB0050	BAJCC	40.00 P		1.000000		
DJJB003	1/1/1901 A		Res Practice Improvement Coach	77700	50712	19212	A	DJJ	R	F	SW	5	POS	NEW	3/22/2022 N	1	DJJR0601	BAJCC	40.00 P		1.000000		
DJJB004	1/1/1901 A		Assistant Superintendent	77700	50712	69116	A	DJJ	R	F	SW	5	POS	NEW	3/22/2022 N	1	DJJB0001	BAJCC	40.00 P		1.000000		
DJJB005	1/1/1901 A		Operations Manager	77700	50712	69116	A	DJJ	R	F	SW	5	POS	NEW	3/22/2022 N	1	DJJB0004	BAJCC	40.00 P		1.000000		
DJJB006	5/19/2022 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	RTC	6/15/2022 N	1	DJJB0052	BAJCC	40.00 P		1.000000		
DJJB007	1/1/1901 A		Office Services Specialist	77700	50712	19012	A	DJJ	R	F	SW	2	POS	NEW	3/22/2022 N	0	DJJB129	BAJCC	40.00 N		1.000000		
DJJB008	1/1/1901 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	NEW	3/22/2022 N	1	DJJB0052	BAJCC	40.00 P		1.000000		
DJJB009	1/1/1901 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	NEW	3/22/2022 N	0	DJJB0052	BAJCC	40.00 P		1.000000		
DJJB010	1/1/1901 A		Office Services Specialist	77700	50712	19012	A	DJJ	R	F	SW	2	POS	NEW	3/22/2022 N	0	DJJB0052	BAJCC	40.00 N		1.000000		
DJJB011	1/1/1901 A		Office Services Specialist	77700	50712	19012	A	DJJ	R	F	SW	2	POS	NEW	3/22/2022 N	1	DJJB0032	BAJCC	40.00 N		1.000000		
DJJB012	1/1/1901 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	NEW	3/22/2022 N	1	DJJB0083	BAJCC	40.00 P		1.000000		
DJJB013	5/19/2022 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	RTC	6/15/2022 N	1	DJJB0032	BAJCC	40.00 P		1.000000		
DJJB014	1/1/1901 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	NEW	3/22/2022 N	1	DJJB0032	BAJCC	40.00 P		1.000000		
DJJB015	1/1/1901 A		Office Services Supervisor	77700	50712	19013	A	DJJ	R	F	SW	3	POS	NEW	3/22/2022 N	1	DJJB0001	BAJCC	40.00 N		1.000000		
DJJB016	5/19/2022 A		Office Services Specialist	77700	50712	19012	A	DJJ	R	F	SW	2	POS	RTC	6/15/2022 N	1	DJJB129	BAJCC	40.00 N		1.000000		
DJJB017	1/1/1901 A		Community Coordinator	77700	50712	69115	A	DJJ	R	F	SW	4	POS	NEW	3/22/2022 N	0	DJJB0050	BAJCC	40.00 P		1.000000		

Run the report using the following criteria:

Criteria	Values	Example
As of Date	Last day of the month being reported	08/31/2022
Business Unit (BU)	Agency BU (5 digits identifier)	77700
Status	Active	

Filter the report using the **Reg/Temp** field. The Cardinal Reg/Temp values and descriptions are listed below:

Reg/Temp Value	Cardinal Description	EPR Use
T	Temporary	Waged Positions
X	Restricted	Restricted Positions
R	Regular	Non-Restricted Positions

Get a count of each required reporting area. These counts should match the values in the corresponding **Non-Restricted**, **Restricted**, and **Waged** fields on the **EPR Tool** page.

NOTE: XXXORPXX Positions are not included in EPR reporting. Exclude from the query results.



V_HR_POSN_DFLT_EMPL_DATA Query

Navigator > Reporting Tools > Query > Query Viewer

Note: Detailed screenshots on how to run the report can be found in the Cardinal Human Resources Reports Catalog.

Position	Default Funding Query	1004	Department	Fiscal Year	Position Number	Budget Level	Headcount Status	Position Status	Incumbent Emplid	Empl Rcd Nbr	Empl Type	Compensation Rate	Camp Frequency	Percent of Distribution	Fund	Program	Department	Cost Center	Task	FIPS
3	77700	10201	50001	2023	DJJEBA03	D	1	A			0 H			100.00	01000	88015	50751			
4	77700	50001	50001	2023	DJJEBA00	P	1	A			0 S			100.00	01000	87011	50001			041
5	77700	50001	50001	2023	DJJEBA01	P	1	A			0 S			100.00	01000	87014	50001			041
6	77700	50001	50001	2023	DJJEBA02	P	1	A			0 S			100.00	01000	87011	50001			041
7	77700	50001	50001	2023	DJJEBA03	D	1	A			1 S			100.00	01000	87011	50001			041
8	77700	50001	50001	2023	DJJEBA04	P	1	A			0 S			100.00	01000	87011	50001			041
9	77700	50001	50001	2023	DJJEBA05	P	0	A			0			100.00	01000	87011	50001			041
10	77700	50001	50001	2023	DJJEBA06	D	0	A			0			100.00	01000	87011	50001			041
11	77700	50001	50001	2023	DJJEBA07	P	0	A			0			100.00	01000	87011	50001			041
12	77700	50001	50001	2023	DJJEBA08	P	1	A			0 S			100.00	01000	87011	50001			041
13	77700	50001	50001	2023	DJJEBA09	P	0	A			0			100.00	01000	87011	50001			041
14	77700	50001	50001	2023	DJJEBA10	P	1	A			0 S			100.00	01000	87011	50001			041
15	77700	50001	50001	2023	DJJEBA11	P	1	A			0 S			100.00	01000	87011	50001			041
16	77700	50001	50001	2023	DJJEBA12	P	1	A			0 S			100.00	01000	87014	50001			041
17	77700	50001	50001	2023	DJJEBA13	P	1	A			0 S			100.00	01000	87012	50001			041
18	77700	50001	50001	2023	DJJEBA14	P	1	A			0 S			100.00	01000	87011	50001			041
19	77700	50001	50001	2023	DJJEBA15	P	1	A			0 S			100.00	01000	87011	50001			041
20	77700	50001	50001	2023	DJJEBA16	P	0	A			0			100.00	01000	87011	50001			041
21	77700	50001	50001	2023	DJJEBA17	P	0	A			0			100.00	01000	87011	50001			041

Review the **Fund** and **Department** Columns to determine how the positions are funded.

Note: Check with the Agency’s Cardinal Budget Processor to understand how the positions are funded if there is a question of general or non-general fund based on the information in Column L and N.


Fund Values	Cardinal Description	EPR Use
01000 and 11000	General Fund	General Fund Row
03060	Non-General Fund (Auxiliary)	Non-General Fun Row
03010, 03020, 03030, 03080	Non-General Fund (sponsored prog)	Non-General Fun Row
All other Funds	Non-General Funds (E&G)	Non-General Fun Row

NOTE: XXXORPXX Positions are not included in EPR reporting. Exclude from the query results.

Employee Position Report (VHRR0019)

Navigator > Workforce Administration > Job Information > Reports > Employee Position Report

Note: Detailed screenshots on how to run the report can be found in the Cardinal Human Resources Reports Catalog.

		Commonwealth of Virginia HOURLY EMPLOYEE POSITION REPORT SUMMARY REPORT		Run Date: 03/17/2023 Run Time: 11:36 00
Company	: DJJ - Department of Juvenile Justice			Page No. 1 of 1
From Date	: 08/01/2022			
To Date	: 08/31/2022			
GENERAL FUND 01000				
		<u>FACULTY</u>	<u>NON FACULTY</u>	
TOTAL HOURS		0.00	3,129.88	
AVAILABLE HOURS TO WORK IN MONTH			40.00	
FTE COUNT		0.00	78.25	
HEADCOUNT EMPLOYEE WITH NONZERO HOURS		0.00	40.00	
NON-GENERAL FUND (FACULTY E & G)				
		<u>FACULTY</u>	<u>NON FACULTY</u>	
TOTAL HOURS		0.00	0.00	
AVAILABLE HOURS TO WORK IN MONTH			40.00	
FTE COUNT		0.00	0.00	
HEADCOUNT EMPLOYEE WITH NONZERO HOURS		0.00	0.00	
NON-GENERAL FUND 0306 (AUXILIARY)				
		<u>FACULTY</u>	<u>NON FACULTY</u>	
TOTAL HOURS		0.00	0.00	
AVAILABLE HOURS TO WORK IN MONTH			40.00	
FTE COUNT		0.00	0.00	
HEADCOUNT EMPLOYEE WITH NONZERO HOURS		0.00	0.00	
NON-GENERAL FUND 03010, 03020, 03030, 03080 (SPONSORED PROGRAM)				
		<u>FACULTY</u>	<u>NON FACULTY</u>	
TOTAL HOURS		0.00	0.00	
AVAILABLE HOURS TO WORK IN MONTH			40.00	
FTE COUNT		0.00	0.00	
HEADCOUNT EMPLOYEE WITH NONZERO HOURS		0.00	0.00	

Run the report using the following criteria:

Criteria	Values	Example
From Date and To Date	The first day of the month and the last day of the month being reported	08/01/2022 - 08/31/2022
Company	Agency Company Code	DJJ
Hours Available to Work in a Month	Hours to work	40

This report provides a breakdown of funds to which the active Positions are charged.

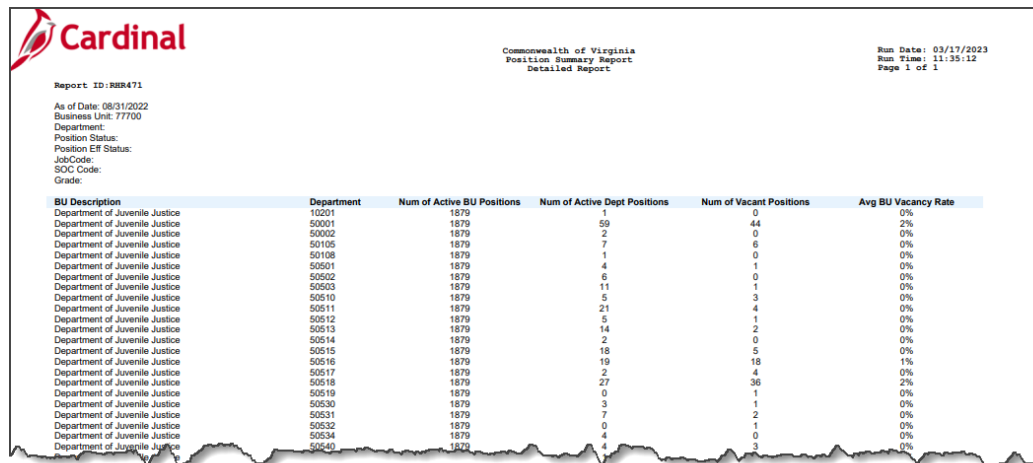
Position Summary Report (RHR471)

Navigator > Organizational Development > Position Management > Position Reports > Position Summary Report

Note: Detailed screenshots on how to run the report can be found in the Cardinal Human Resources Reports Catalog.

This report displays specific Position details and summarized Position data including Position counts and percentage of average vacancy rate by Business Unit and Department.

Validate that the information displays the expected results.



Report ID: RHR471
 As of Date: 08/31/2022
 Business Unit: 77700
 Department:
 Position Status:
 Position Eff Status:
 Job Code:
 SOC Code:
 Grade:

BU Description	Department	Num of Active BU Positions	Num of Active Dept Positions	Num of Vacant Positions	Avg BU Vacancy Rate
Department of Juvenile Justice	10201	1879	1	0	0%
Department of Juvenile Justice	50001	1879	59	44	2%
Department of Juvenile Justice	50002	1879	2	0	0%
Department of Juvenile Justice	50105	1879	7	6	0%
Department of Juvenile Justice	50108	1879	1	0	0%
Department of Juvenile Justice	50501	1879	4	1	0%
Department of Juvenile Justice	50502	1879	6	0	0%
Department of Juvenile Justice	50503	1879	11	1	0%
Department of Juvenile Justice	50510	1879	5	3	0%
Department of Juvenile Justice	50511	1879	21	4	0%
Department of Juvenile Justice	50512	1879	5	1	0%
Department of Juvenile Justice	50513	1879	14	2	0%
Department of Juvenile Justice	50514	1879	2	0	0%
Department of Juvenile Justice	50515	1879	18	5	0%
Department of Juvenile Justice	50516	1879	19	18	1%
Department of Juvenile Justice	50517	1879	2	4	0%
Department of Juvenile Justice	50518	1879	27	36	2%
Department of Juvenile Justice	50519	1879	0	1	0%
Department of Juvenile Justice	50530	1879	3	1	0%
Department of Juvenile Justice	50531	1879	7	2	0%
Department of Juvenile Justice	50532	1879	0	1	0%
Department of Juvenile Justice	50534	1879	4	0	0%
Department of Juvenile Justice	50540	1879	4	3	0%

Run the report using the following criteria:

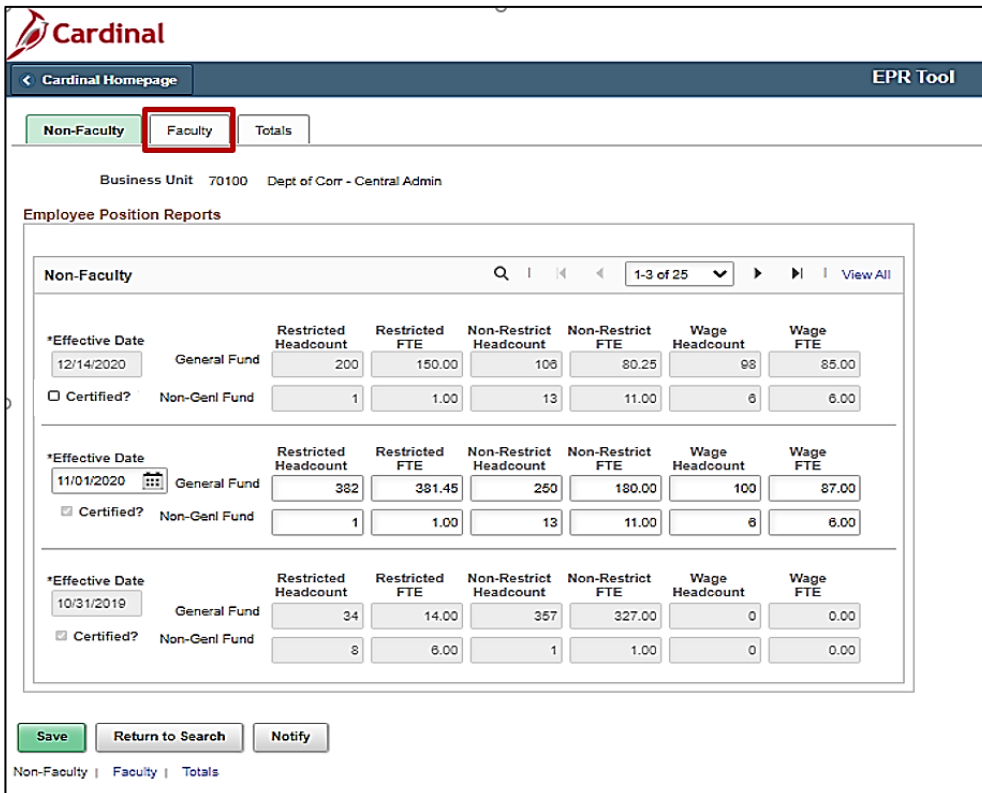
Criteria	Values	Example
As of Date	Last day of the month being reported	08/31/2022
Business Unit	Agency BU	77700
Hours Available to Work in a Month	Hours to work	40

Updating the Employee Position Report

1. Navigate to the **EPR Tool** page using the following path:

Navigator > Workforce Administration > EPR Tool

The **EPR Tool** page displays with the **Non-Faculty** tab displayed by default.



Business Unit 70100 Dept of Corr - Central Admin

Employee Position Reports

Non-Faculty

*Effective Date	General Fund	Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020		200	150.00	108	80.25	98	85.00
<input type="checkbox"/> Certified?	Non-Genl Fund	1	1.00	13	11.00	6	6.00
11/01/2020		382	381.45	250	180.00	100	87.00
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	1	1.00	13	11.00	6	6.00
10/31/2019		34	14.00	357	327.00	0	0.00
<input checked="" type="checkbox"/> Certified?	Non-Genl Fund	8	6.00	1	1.00	0	0.00

Save Return to Search Notify

Note: The Non-Faculty and Faculty totals will auto-populate the **Totals** page. After the EPR Run Control process is completed, the current row will be displayed, and the **Certified** checkbox option will not be checked.

2. With the results of the analysis completed above, update the information as needed.

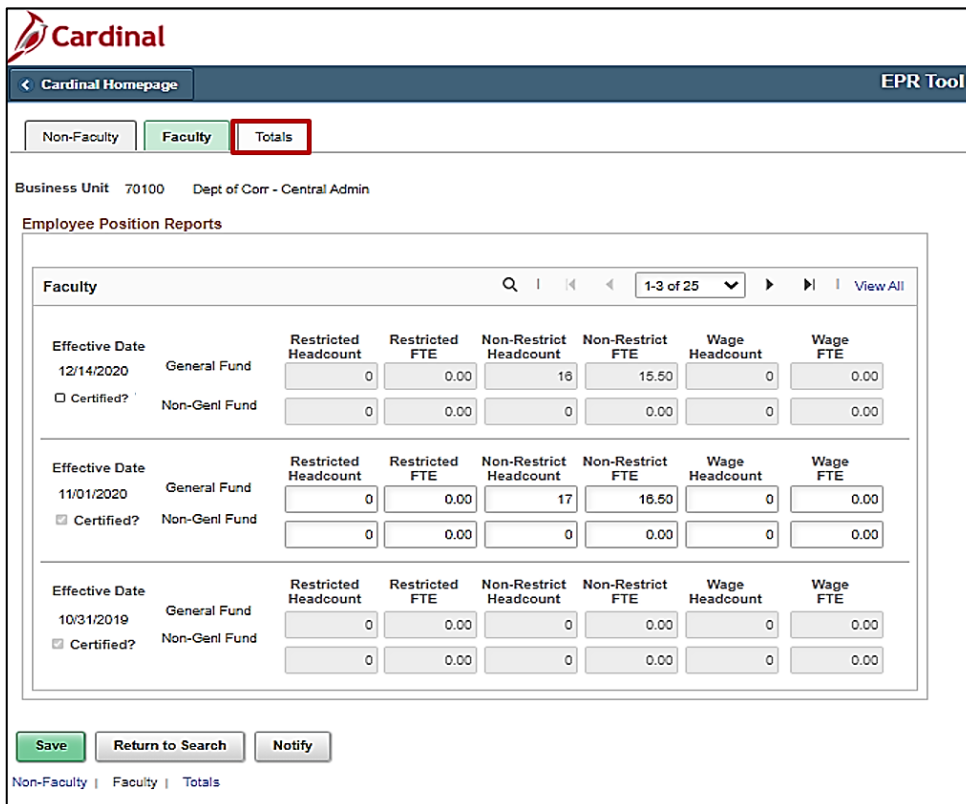
NOTE: If updates are made to the EPR pages, this means that updates need to be made to one of the source tables: Position, Job, or Position Default Funding. If changes are not made to the source tables when the EPR process is run for the next month, the data will be incorrectly displayed and the Agency will need to again update the pages prior to certification.

3. Validate that the **Certified** checkbox option is not checked.

4. If your Agency has Non-Faculty and/or Waged employees, enter the correct information in the applicable fields.

5. If your Agency has Faculty employees, click the **Faculty** tab.

The **Faculty** tab displays.



Cardinal

< Cardinal Homepage EPR Tool

Non-Faculty Faculty **Totals**

Business Unit 70100 Dept of Corr - Central Admin

Employee Position Reports

Faculty 1-3 of 25 View All

Effective Date	General Fund	Restricted Headcount	Restricted FTE	Non-Restrict Headcount	Non-Restrict FTE	Wage Headcount	Wage FTE
12/14/2020	<input type="checkbox"/> Certified?	0	0.00	18	15.50	0	0.00
	Non-Genl Fund	0	0.00	0	0.00	0	0.00
11/01/2020	<input checked="" type="checkbox"/> Certified?	0	0.00	17	16.50	0	0.00
	Non-Genl Fund	0	0.00	0	0.00	0	0.00
10/31/2019	<input checked="" type="checkbox"/> Certified?	0	0.00	0	0.00	0	0.00
	Non-Genl Fund	0	0.00	0	0.00	0	0.00

Save Return to Search Notify

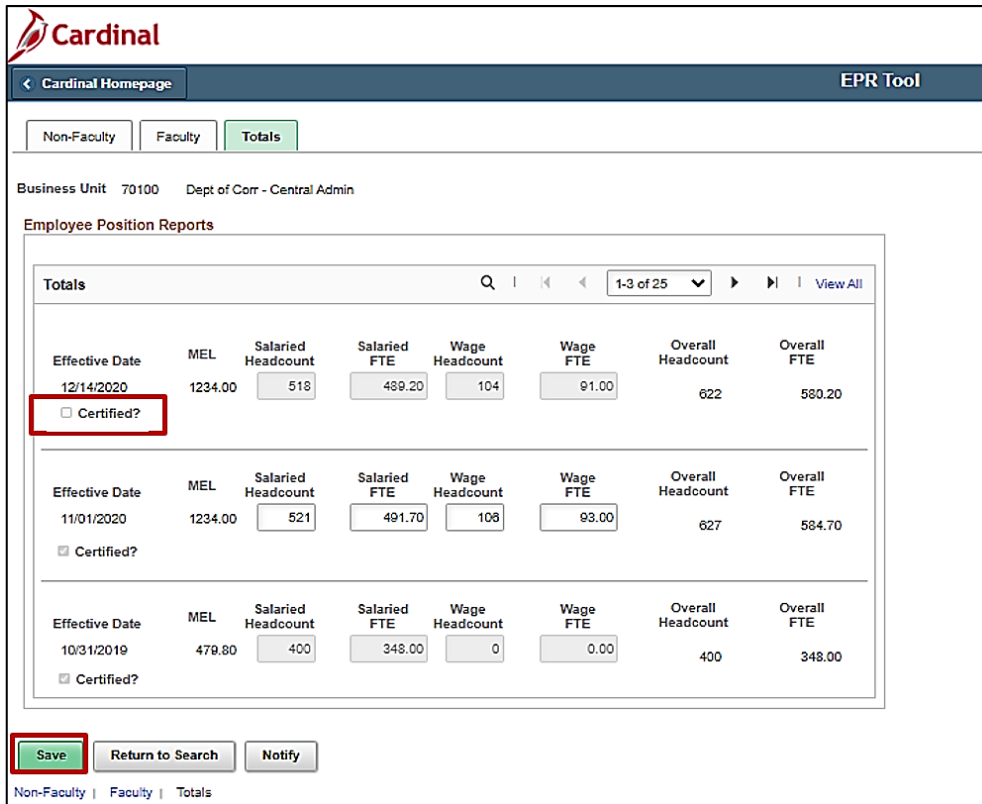
Non-Faculty | Faculty | Totals

6. Validate that the **Certified** checkbox option is not checked.

7. If your Agency has Faculty employees, enter the correct information in the applicable fields.

8. Click the **Totals** tab.

The **Totals** tab displays.



Business Unit 70100 Dept of Corr - Central Admin

Employee Position Reports

Totals

Effective Date	MEL	Salaried Headcount	Salaried FTE	Wage Headcount	Wage FTE	Overall Headcount	Overall FTE
12/14/2020	1234.00	518	489.20	104	91.00	622	580.20
<input type="checkbox"/> Certified?							
11/01/2020	1234.00	521	491.70	108	93.00	627	584.70
<input checked="" type="checkbox"/> Certified?							
10/31/2019	479.80	400	348.00	0	0.00	400	348.00
<input checked="" type="checkbox"/> Certified?							

Save Return to Search Notify

- If the information is correct, click the **Certified** checkbox option on the **Non-Faculty**, **Faculty**, and **Totals** tabs (top row).
- Click the **Save** button.

Note: Once the transaction is saved, the data cannot be uncertified or changed. Validate that all data is correct before clicking the **Save** button.