Overview of Effective Dating

Effective dating enables the ability to keep historical, current, and future-dated information and provides the ability to update existing information without losing or overwriting the data already in Cardinal.

Table of Contents

Revision History 2
Overview of Effective Dating 3

Revision History

Revision Date	Summary of Changes
7/25/2025	Added an explanation note on page 5 of Section 1 regarding a new Position Effective Date error.
1/16/2025	Baseline

Overview of Effective Dating

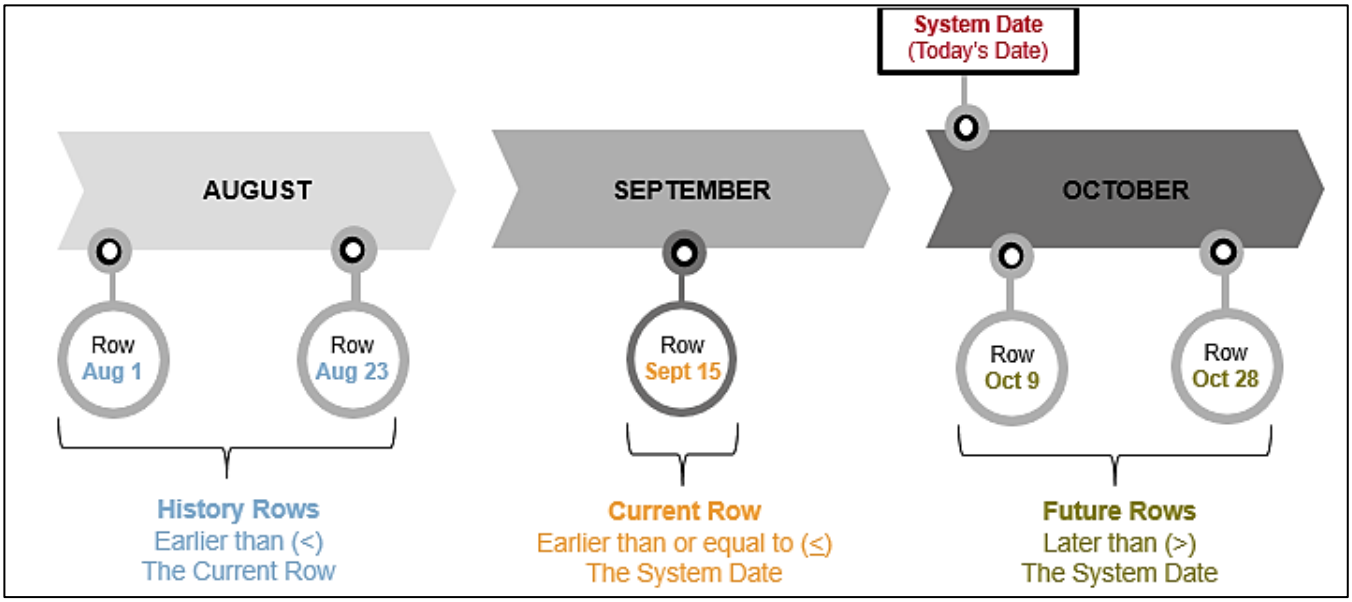
It is imperative to retain existing data in the database when entering new information related to existing data, (e.g., incumbent position transfer, pay rate change). To retain history, insert an effective date, which is a data row identified by a date that indicates when the new information goes into effect.

Effective dating provides the ability to store historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

The following table provides high-level overview information for each type of effective dating row:

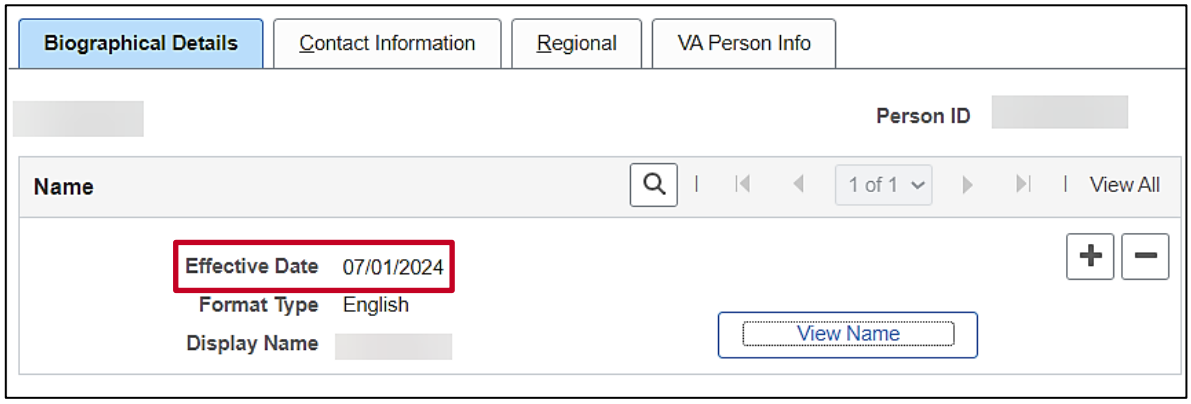
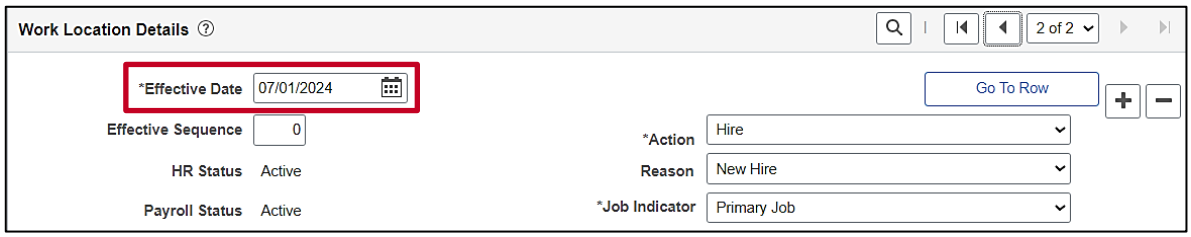
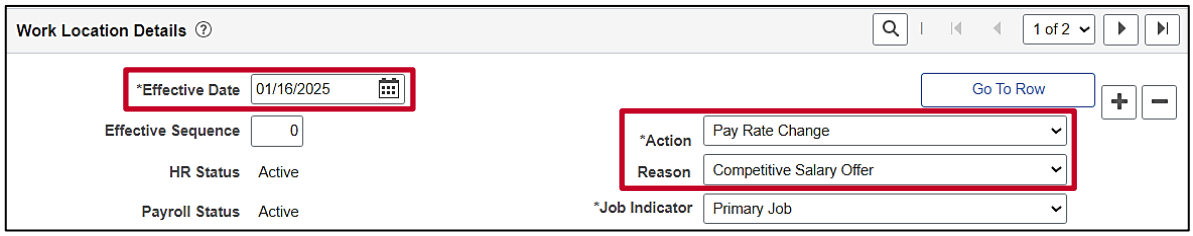
Types of Effective Dated Rows	Criteria	Number of Rows Allowed	View Access	Update Access	Insert Access
History	Effective Date < Effective Date of the Current Row	Zero to Many	Yes	No	No
Current	Effective Date <= Today's Date	One	Yes	No	Yes
Future	Effective Date > Today's Date	Zero to Many	Yes	Yes	Yes

The following diagram displays an example of history, current, and future effective dates:

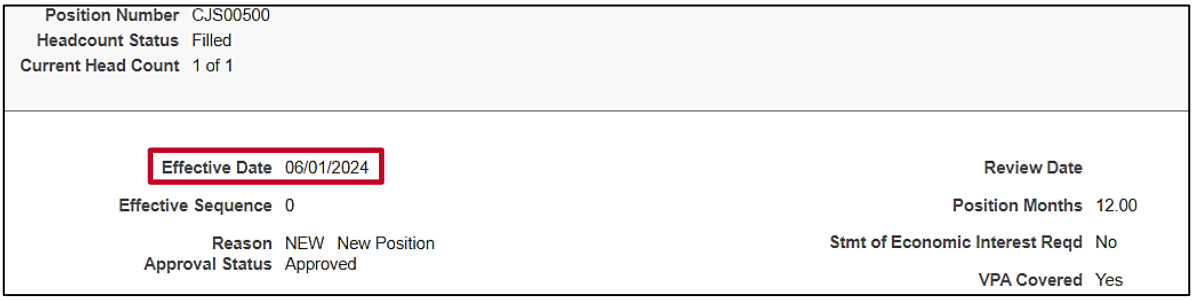
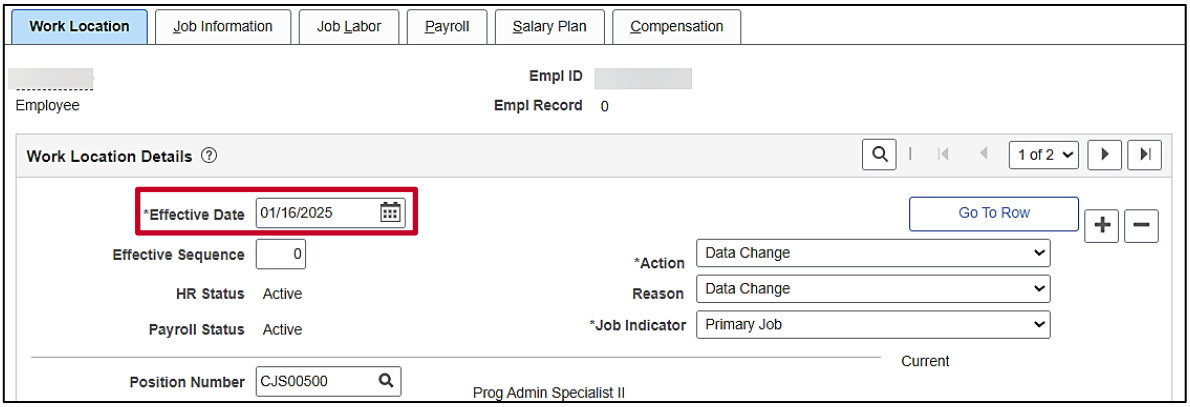
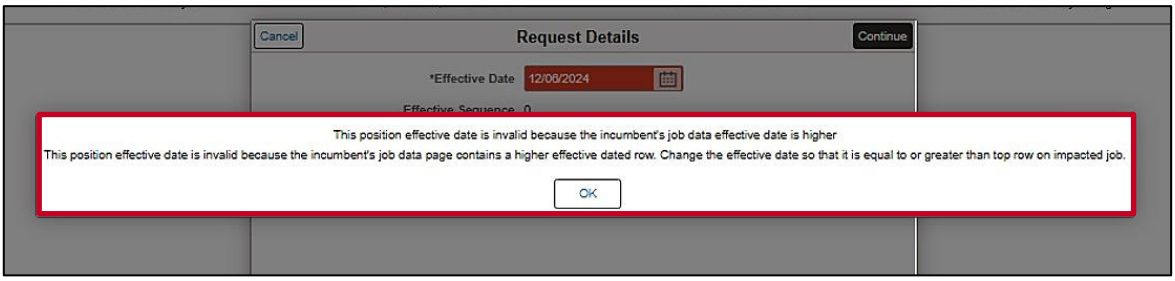


Tips: Multiple actions with the same effective date on the employee's job record are handled by using the effective sequence field found on the **Work Location** tab on the **Job Data** page to differentiate actions with the same effective date. The record row with the lowest number becomes a historical row of data when a new sequence is added.

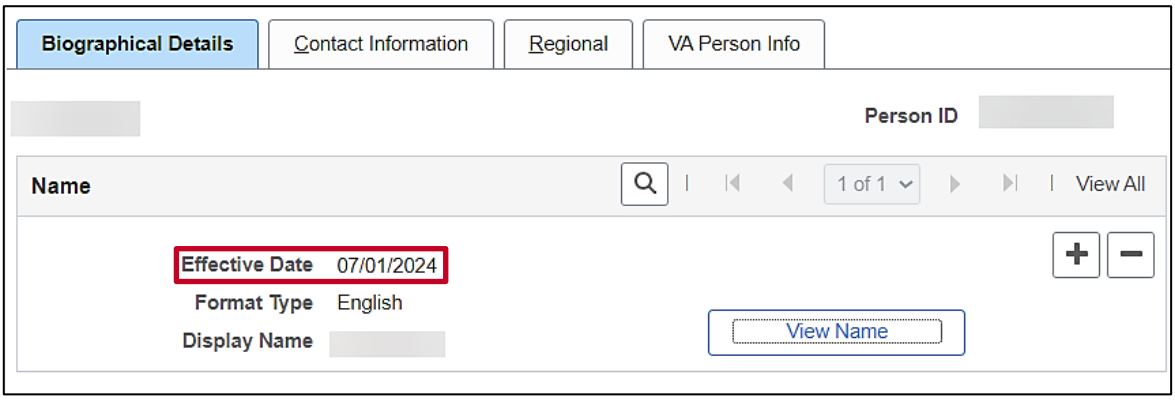
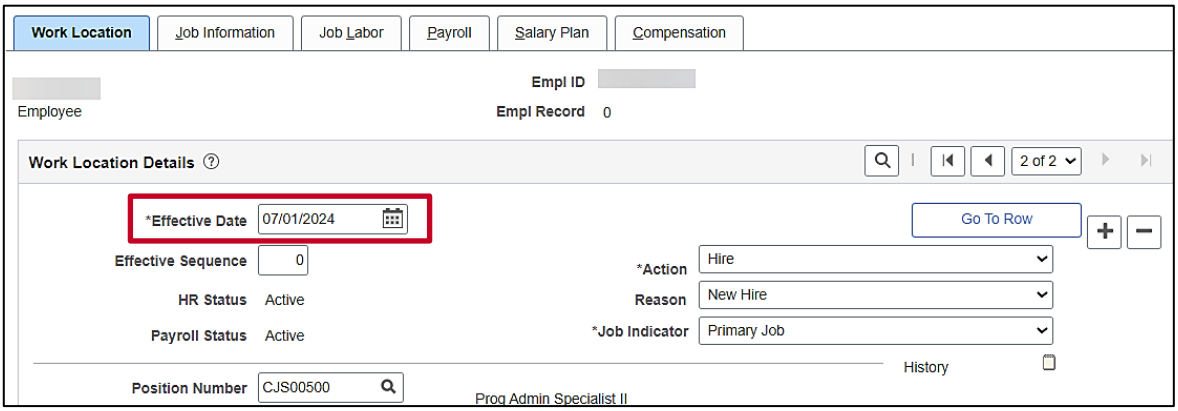
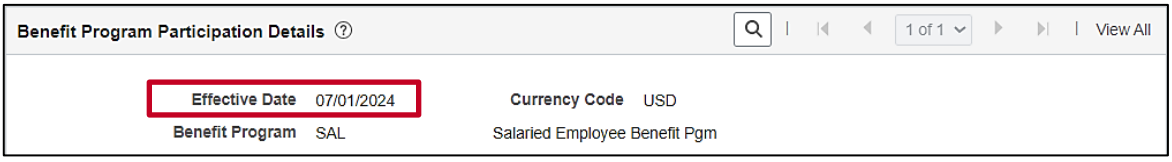
Example of how the Personal Record and the Job Record Effective Dates impact each other:

Step	Action
	The effective date of the hire on the Job Record cannot occur earlier than the effective date on the Personal Data Record. **Note**: In this example, the Personal Data Effective Date is 07/01/2024.  **Note**: In this example, the Job Record Effective Date of Hire is 07/01/2024. The Job Record Effective Date must occur on or later than the date of the Personal Data Effective Date.  **Note**: The effective date of any Job Record modifications must occur on or later than the effective date of the current Job Record Effective Date. Contact DHRM if there is a requirement to insert a transaction prior to the current Job Record Effective Date. 

Example of how the Position and Job Record Effective Dates impact each other:

Step	Action
	In this example, the Position Effective Date is 06/01/2024.  **Note**: The incumbent employee's Job Data Effective Date must be on or later than the Position Effective Date.  **Note**: If a position change precedes the highest effective dated row on the incumbent's job an error message will display in a pop-up window. Change the effective date as stated in the note above. 

Example of how the Personal, Job, and Benefit Record Effective Dates impact each other:

Step	Action
	The current active row on the effective dated tables is the row with the most recent effective date less than or equal to the current date. • Agencies must submit a help desk ticket to the Cardinal Post Production Support (PPS) team to update current rows and history rows. • Agencies can enter new rows with effective dates greater than the most current row, including future-dated rows. **Note**: In this example, the Personal Data Effective Date is 07/01/2024.  **Note**: In this example, the Job Record Effective Date of Hire is 07/01/2024. The Job Record Effective Date must occur on or later than the date of the Personal Data Effective Date.  **Note**: In this example, the Benefit Program Participation Effective Date is 07/01/2024. The Benefit Program Participation Effective Date must occur on or later than the Job Record Effective Date of Hire.