Processing a Change in Full/Part/Quasi Status Overview

When updating an employee from full-time, part-time, or quasi status, the change must be made first to the Position. Before making the change to the Position, review the employee's Job Record to determine the highest effective dated row. The effective date used on the Position update transaction must be greater than the highest effective date on the employee's Job Record so that the Position change will flow over to the employee's Job Record correctly.

After updating the applicable fields on the Position, navigate to the employee's Job Record to update the applicable fields that affect pay using the same effective date as the Position change and incrementing the **Effective Sequence** field by one. Because the employee's compensation has to be updated, use an Action in Job Data of "Pay Rate Change" and the applicable Reason for the change.

Navigation Note: Please note that there may be 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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Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Steps 1 and 19). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Updating a Change in Status from Full/Part/Quasi

Before beginning, navigate to the employee's Job Record to check the effective date of the highest effective dated row. When updating the Position, the effective date used must be after the effective date on the employee's highest effective dated Job Data row.

Step	Action
1.	Navigate to the **Job Data** page using the following path: **NavBar > Menu > Workforce Administration > Job Information > Job Data**
	The **Job Data Find an Existing Value** page displays. **Job Data** **Find an Existing Value** ∨ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. ⟲ Recent Searches [Choose from recent searches ▾] ✎ 🔖 Saved Searches [Choose from saved searches ▾] ✎ Empl ID [begins with ▾] [|] Empl Record [= ▾] [ ] Name [begins with ▾] [ ] Last Name [begins with ▾] [ ] Second Last Name [begins with ▾] [ ] Alternate Character Name [begins with ▾] [ ] Middle Name [begins with ▾] [ ] ∧ Show fewer options ☐ Case Sensitive ☐ Include History ☐ Correct History [Search] [Clear]
ℹ️	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Search for the applicable employee by entering the Employee ID in the **Empl ID** field. ▾ Search Criteria Empl ID [begins with ▾] [ ] Empl Record [= ▾] [ ]

Step	Action
3.	Click the **Include History** checkbox. ☐ Case Sensitive ☐ Include History ☐ Correct History
4.	Click the **Search** button. Search Clear
	The **Job Data** page for the employee displays (**Work Location** tab).
5.	Locate the employee's highest effective dated row and make note of that date.
ℹ️	When updating the Position, the effective date used must be after the highest effective date found on the employee's Job Record in order for the Position change to flow to the Job Record correctly.

Step	Action
6.	Access the employee's Position to make the update to their full/part/quasi status using the following path: **NavBar > Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Manage Position**
	The **View Manage/Create Position** page displays.
7.	Enter the employee's Position Number in the **Position Number** field.
8.	Click the **Search** button.
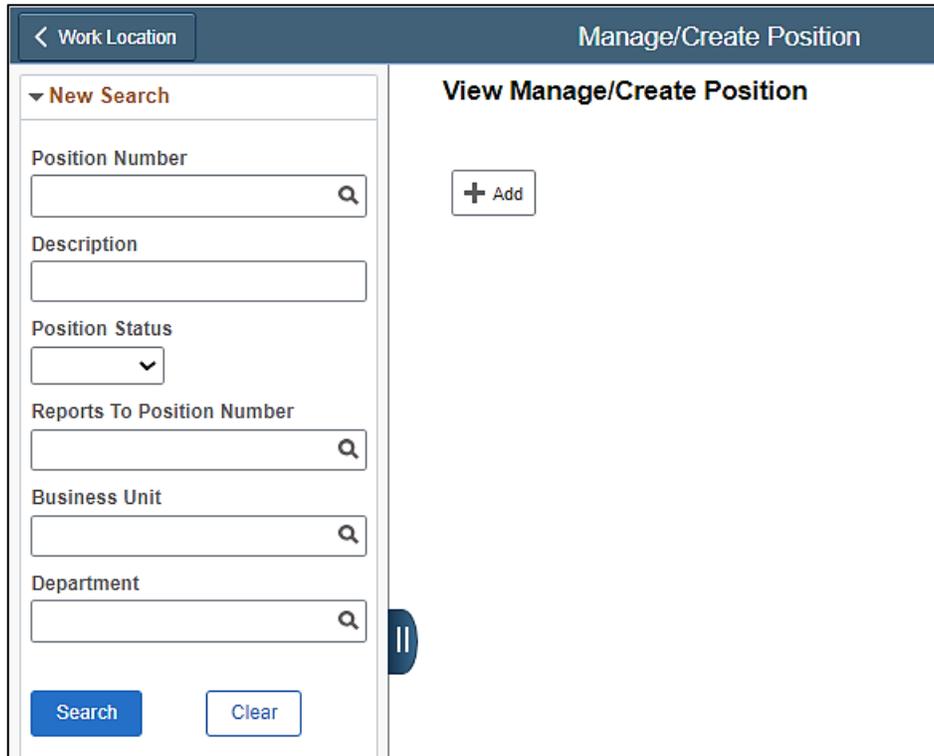
Step	Action
	The employee's Position displays.
9.	Click anywhere in the Position row to select it.
	The **Position Details** page displays.
10.	Click the **Add a New Row** (**+**) button.
	The **Request Details** page displays in a pop-up window.

Step	Action
11.	Select the applicable effective date for the change using the **Effective Date Calendar** icon. **Note**: The effective date must be after the date captured in Step 5. *Effective Date [ ] 🗓 Effective Sequence 0 Reason Code [ ] 🔍
12.	Select the applicable reason for the update using the **Reason Code Lookup** icon. *Effective Date [ ] 🗓 Effective Sequence 0 Reason Code [ ] 🔍
13.	Click the **Continue** button. Cancel **Request Details** Continue *Effective Date 02/01/2025 🗓 Effective Sequence 0 Reason Code UPD 🔍 Position Data Update

The **Step 1 of 4: Position Data** page displays.

Position Number CJS00279
Headcount Status Filled
Current Head Count 1 of 1

Next ›

1	Position Data Visited
2	Specific Information Not Started
3	Budget Incumbents Not Started
4	Review and Submit Not Started

Step 1 of 4: Position Data

Effective Date 02/01/2025
Effective Sequence 0
Reason Code UPD

Review Date [ ] 🗓
*Position Months 12.00
Stmt of Economic Interest Reqd   No
VPA Covered   Yes

Position Information

*Position Status   Approved
*Status   Active
Action Date   02/14/2025 🗓
Alternate Work Schedule   Yes
Key Position   No
Budgeted Position   Yes
Confidential Position   No

Max Head Count   1
Status Date   09/21/2022 🗓
SOC Code / Extension   21-1099 🔍
Job Sharing Permitted   No
Available for Telework   Yes
*EEO-4 Job Category   Professionals
*Workers' Comp Code   8810

Job Information

*Business Unit   14000 🔍 Dept of Criminal Justice Svcs
*Job Code   19212 🔍 Prog Admin Specialist II
*Regular/Temporary   Regular
*Regular Shift   Not Applicable

*Full/Part Time   Full-Time
Union Code   [ ] 🔍
Short Title   19212
Description   Program Administration Specialist II

Step	Action
14.	In the **Job Information** section, update the **Full/Part Time** field using the dropdown button provided. **Job Information** *Business Unit 14000 Dept of Criminal Justice Svcs *Full/Part Time Full-Time *Job Code 19212 Prog Admin Specialist II Union Code
15.	Click the **Next** button located in the top right corner. Next >
	The **Step 2 of 4: Specific Information** page displays. **Note**: No changes are needed on this page. Position Number CJS00279 Headcount Status Filled Current Head Count 1 of 1 ‹ Previous Next › 1 Position Data Visited 2 Specific Information Visited 3 Budget Incumbents Not Started 4 Review and Submit Not Started Step 2 of 4: Specific Information Effective Date 02/01/2025 Reason Code UPD Position Data Update Effective Sequence 0 Approval Status Not Available **Specific Information** Mail Drop ID Telephone Drug Program No Signature Authority Privatization No Agency Use 1 License 1 Agency Use 2 License 2 Agency Use 3 0000000000 License 3 Physical Requirements Yes Fingerprinting Required No Certifications No Safety Sensitive Position No Language No Critical/Hard to Hire No
16.	Click the **Next** button. Next >
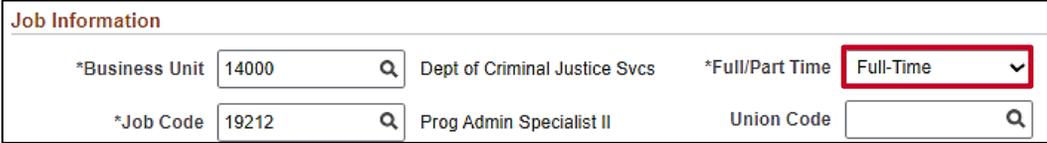
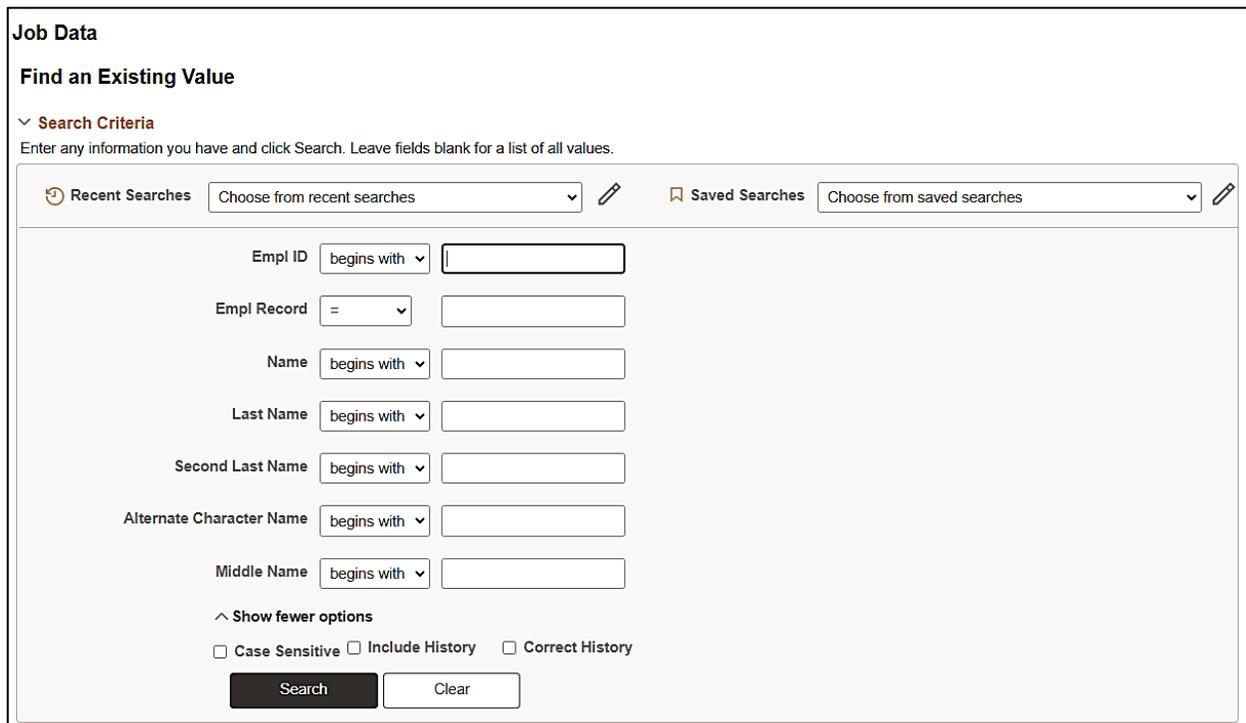| Step	Action
	The **Step 3 of 4: Budget Incumbents** page displays. **Note**: No changes are needed on this page.
17	Click the **Next** button.
	The **Step 4 of 4: Review and Submit** page displays.
18.	Review the changes made (**Proposed Value** column) and then click the **Submit** button. **Note**: Use the **Previous** button if the change is not reflected accurately.

Step	Action
	The **Position Confirmation page** displays.

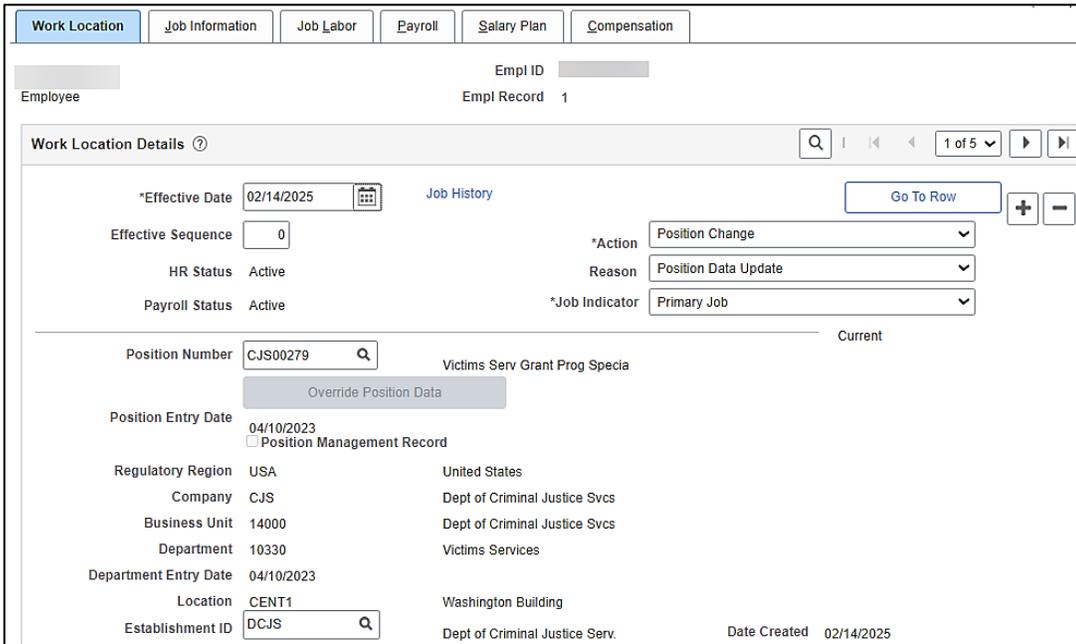| Step	Action
19.	Re-access the employee's Job Record to make the update. Navigate to the **Job Data** page using the following path: **NavBar > Menu > Workforce Administration > Job Information > Job Data**
	The **Job Data Find an Existing Value** page displays.

ℹ️	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

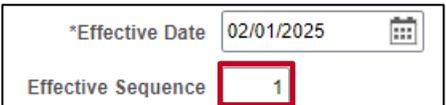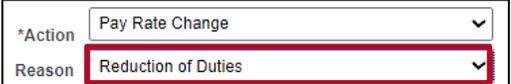| Step	Action
20.	Search for the applicable employee by entering the Employee ID in the **Empl ID** field.
21.	Click the **Include History** checkbox.
22.	Click the **Search** button.

The **Job Data** page for the employee displays (**Work Location** tab).

ℹ️	The highest effective dated row should now be the Position Data Update just completed.
	Click the **Add a New Row** (**+**) button to add a new row.

Step	Action
	The **Job Data** page refreshes (**Work Location** tab), and the row count increments by 1.
23.	Select the applicable effective date using the **Effective Date Calendar** icon.
ℹ	Use the same effective date that was used for the Position update.
24.	Increment the **Effective Sequence** field by 1 since the same effective date as the Position Update is being used.
25.	Click the **Action** field dropdown button and select "Pay Rate Change".
26.	Select the applicable reason using the **Reason** field dropdown button.
27.	Click the **Job Information** tab.

Step	Action
	The **Job Information** tab displays.
28.	Review the **Full/Part** field and ensure accuracy based on the Position update that was made.
29.	Update the **Standard Hours** field to reflect the employee's new hours and tab out of the field.
ℹ	The **FTE** field will calculate after tabbing out of the **Standard Hours** field.
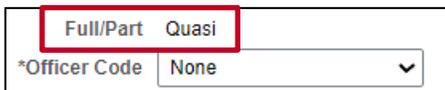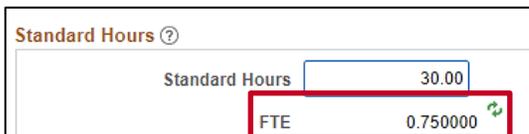
Step	Action
	The **Job Data** page refreshes (**Job Information** tab).
30.	Click the **Compensation** tab.
	The **Compensation** tab displays.

Step	Action
31.	Click the **Default Pay Components** button. Default Pay Components
32.	In the **Pay Components** section, update the **Comp Rate** field. Pay Components ⓘ Amounts / Controls / Changes / Conversion ‖► 1-1 of 1 *Rate Code / Seq / Comp Rate / Currency / Frequency / Percent 1 STATE / 0 / 45,000.000000 / USD / A Calculate Compensation
ⓘ	This calculation must be completed manually as Cardinal does not auto-calculate the Comp Rate. This calculation is based on the adjusted annual compensation percentage in correlation to the employee's new hours.
33.	Click the **Calculate Compensation** button. Calculate Compensation
34.	Click the **Benefits Program Participation** link. Job Data Employment Data Earnings Distribution Benefits Program Participation
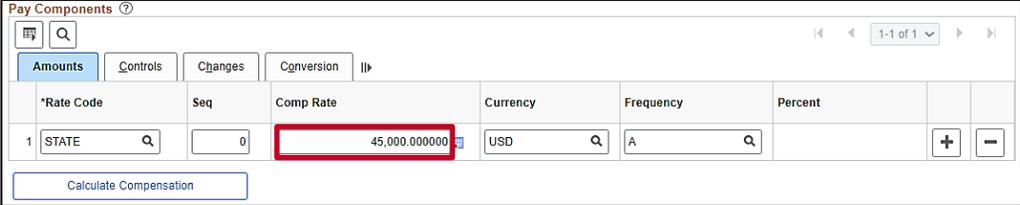
The **Benefits Program Participation** page displays.
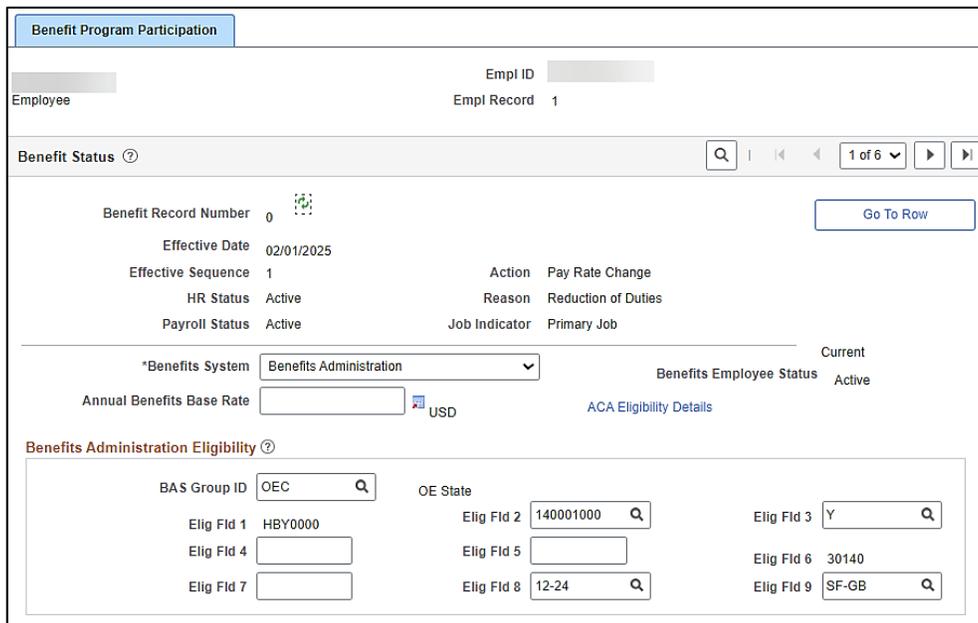
Benefit Program Participation

Employee   Empl ID
                                           Empl Record 1

Benefit Status ⓘ   1 of 6

Benefit Record Number 0   Go To Row

Effective Date 02/01/2025
Effective Sequence 1   Action Pay Rate Change
HR Status Active   Reason Reduction of Duties
Payroll Status Active   Job Indicator Primary Job

*Benefits System Benefits Administration   Benefits Employee Status Current Active
Annual Benefits Base Rate _____ USD   ACA Eligibility Details

Benefits Administration Eligibility ⓘ

BAS Group ID OEC   OE State
Elig Fld 1 HBY0000   Elig Fld 2 140001000   Elig Fld 3 Y
Elig Fld 4 _____   Elig Fld 5 _____   Elig Fld 6 30140
Elig Fld 7 _____   Elig Fld 8 12-24   Elig Fld 9 SF-GB

Step	Action
35.	Update the **Elig Fld 9** field. Elig Fld 9 [SQ-GB]
ℹ️	Use the chart below to select the applicable values when updating the **Elig Fld 9** field: <table><tr><th>Valid Values</th><th>Definitions</th></tr><tr><td>SF-GB</td><td>Full Time Employee</td></tr><tr><td>SP-GB</td><td>Part Time Employee</td></tr><tr><td>SQ-GB</td><td>Quasi Employee</td></tr></table>
36.	Click the **Save** button. Save Return to Search Previous in List Next in List Notify Refresh
37.	Highlight the employee's **Employee ID** and copy it (right click on mouse and select "Copy") to run the **Employee Activity Report**. Empl ID [ ]
38.	Run the **Employee Activity Report** for the employee using the following navigation path: **NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report**
39.	Print the report and place the printed transaction in the employee file for future audit requests. **Note**: For additional information on the Employee Activity Report and the steps used to run this report, refer to the **Cardinal Human Resources Reports Catalog.** The HCM Reports Catalogs can be found on the Cardinal website in **Reports Catalogs** under **Resources.**