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, a valid Social Security Number (SSN) must be available and verified 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 SSN, 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 [Hiring a Person When Personal Data Exists in Cardinal](#) section of this Job Aid 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. For instance, email address updates that are being made by one Agency can impact 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 their 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 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.

Table of Contents
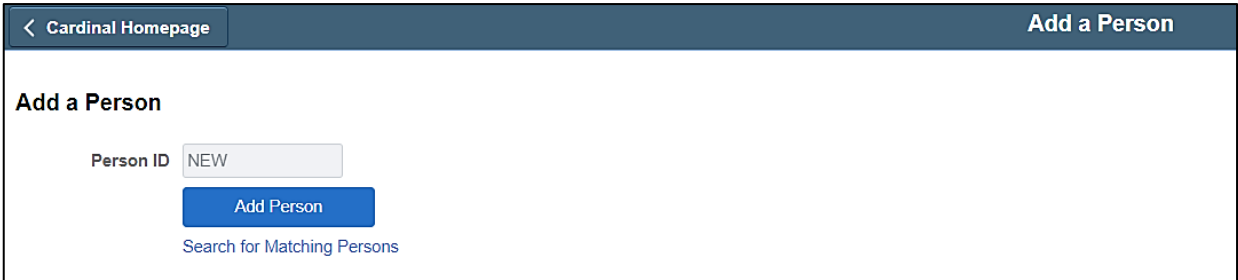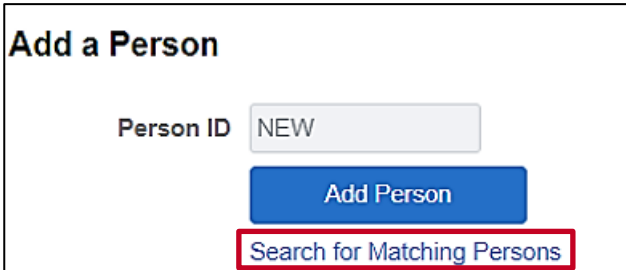
Revision History

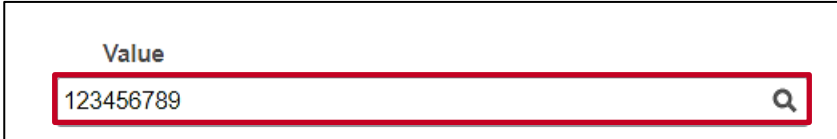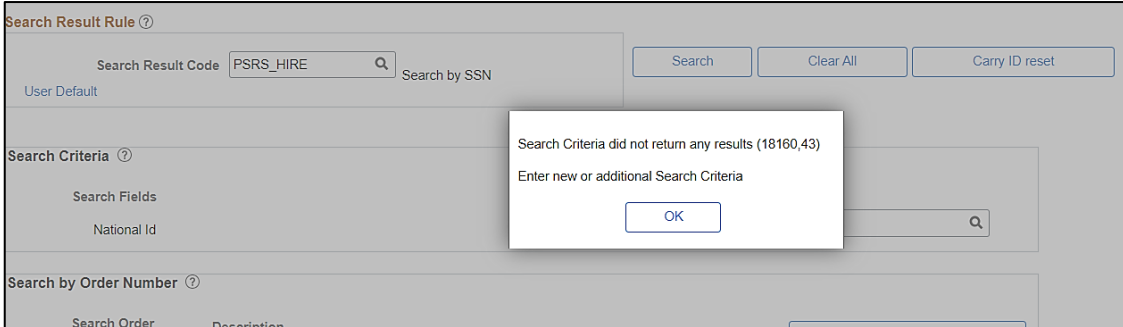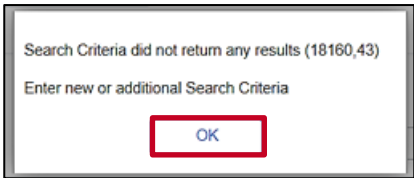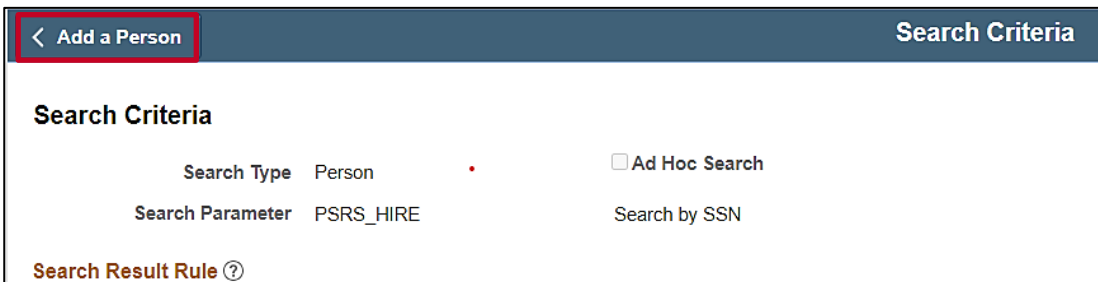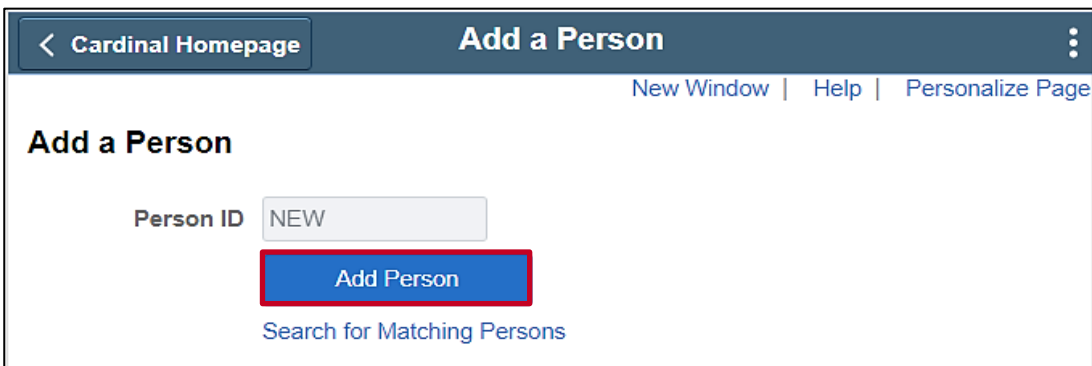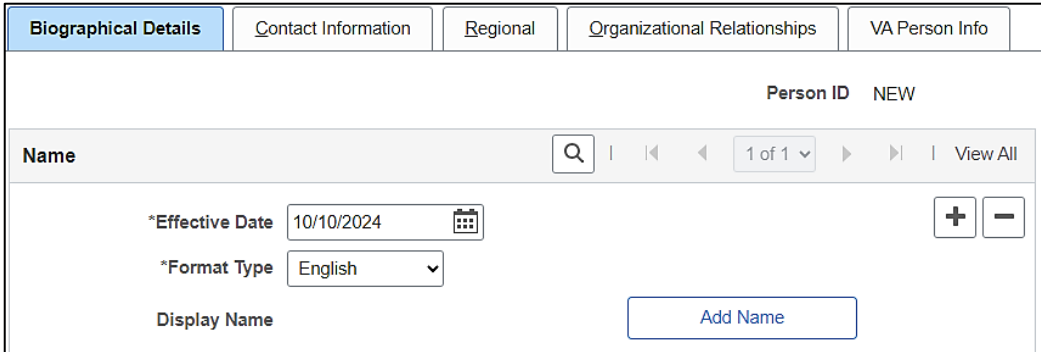| Revision Date	Summary of Changes
11/25/2025	Updated the Hiring a Person When Personal Data (Employee ID) Exists in Cardinal and the Agency Next Steps After Entering the New Hire sections with Direct Deposit information.
11/14/2025	Note added regarding business email address for employees with multiple jobs in the Completing a New Hire section.
4/29/2025	Updated the screenshot of the Benefit Program Participation page (Section 1, after step 86), updated the screenshot of the Benefits Administration Eligibility section (Section 1, step 87), and added additional information regarding the Eligibility Fields.
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Step 2; Section 2, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.
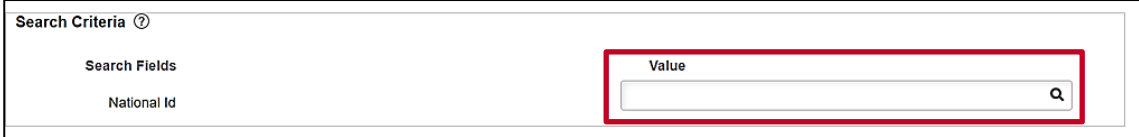
Completing a New Hire

Before beginning, the applicable employee's SSN must be available for immediate reference. This process begins with a search which 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.
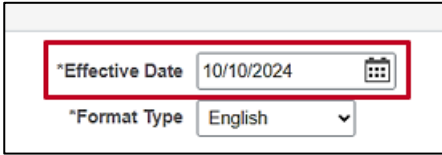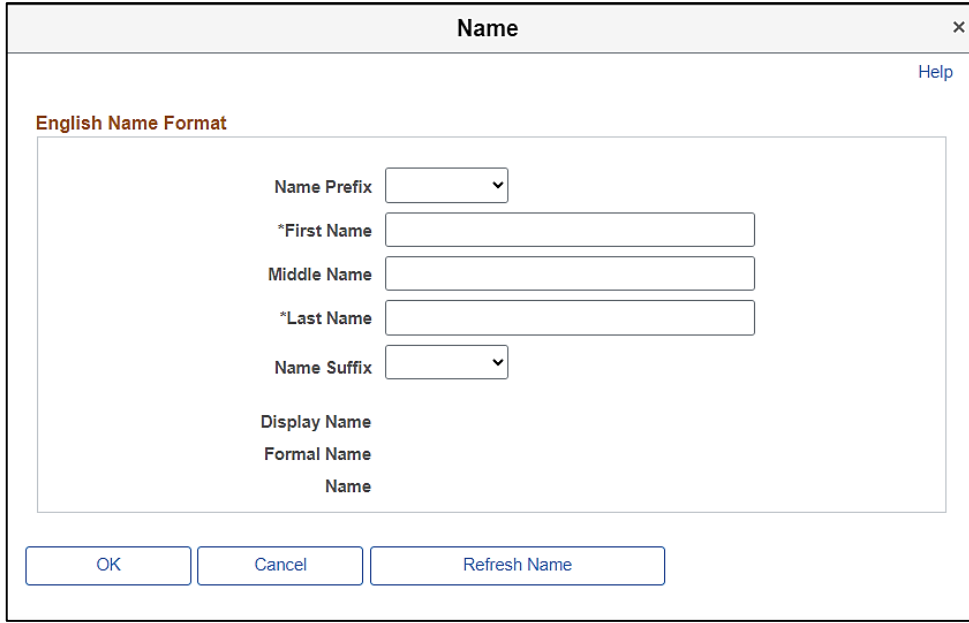
Step	Action
1.	Navigate to the **Add a Person** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Add a Person**

The **Add a Person** page displays.

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

![CARDINAL logo]

Step	Action
	The **Search/Match Find an Existing Value** page displays.

The **Search/Match Find an Existing Value** page interface shows:

← Add a Person — Search/Match

Search/Match

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

Search Type | = | Person
Search Parameter | begins with | PSHR_SAVE_TIME
Ad Hoc Search | ☐
Description | begins with |

⌃ Show fewer options

[Search] [Clear]

Step	Action
3.	Click the **Clear** button.

[Search] [**Clear**]

| 4. | Click the **Search** button. |

[**Search**] [Clear]

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 | [Selective Search]
10 | NID Only

Step	Action
5.	Enter the employee's SSN into the **Value** field within the **Search Criteria** section. Search Criteria ⑦ Search Fields — National Id Value [🔍]
6.	Press the **Tab** key on the keyboard to enable the **Search** button to the right of the **Search Result Rule** section.
ⓘ	The SSN is reformatted automatically (e.g., dashes are removed if they were entered). Value 123456789 🔍
7.	Click the **Search** button. Search Result Rule ⑦ Search Result Code PSRS_HIRE 🔍 Search by SSN [Search] [Clear All] [Carry ID reset] User Default

The Search Criteria results message displays in a pop-up window.

Search Result Rule ⑦
Search Result Code PSRS_HIRE 🔍 Search by SSN [Search] [Clear All] [Carry ID reset]
User Default

Search Criteria ⑦

Search Fields
National Id

Search Criteria did not return any results (18160,43)

Enter new or additional Search Criteria

[OK]

Search by Order Number ⑦

Search Order   Description

Selective Search

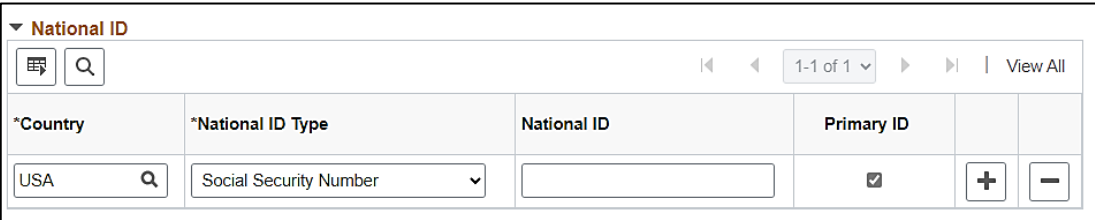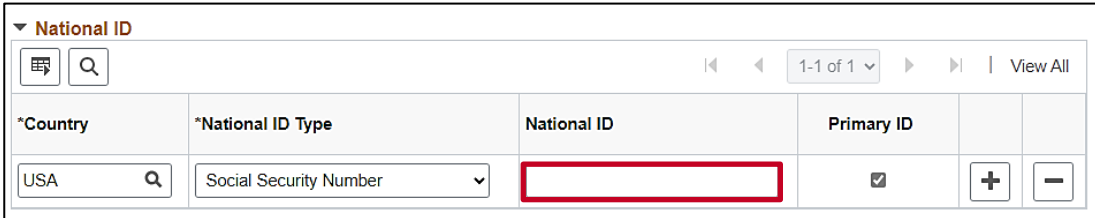| ⓘ | The above message displays when the employee's SSN is not in the Cardinal system. In these cases, proceed to Step 8.

 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**. |
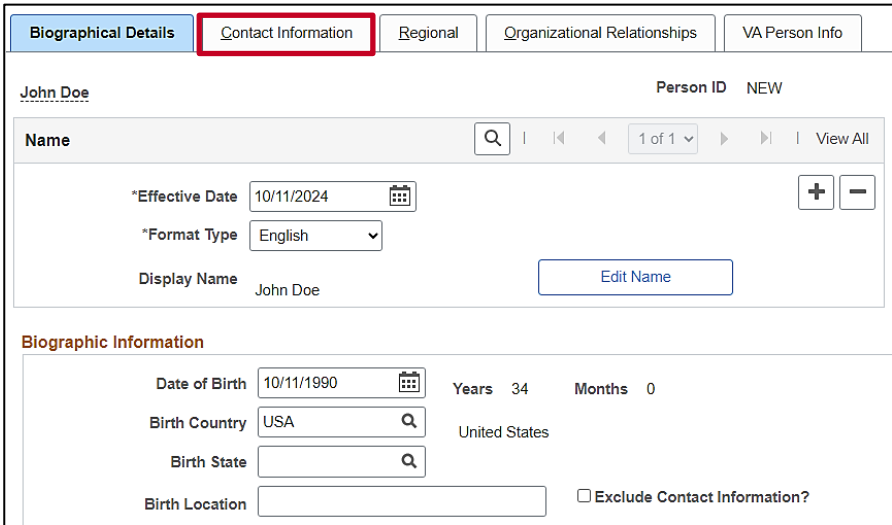
Step	Action
8.	Click the **OK** button to close the Search Criteria message. Search Criteria did not return any results (18160,43) Enter new or additional Search Criteria [OK]
9.	The **Search Criteria** page returns. Click the **Add a Person** tab in the top left corner of the page. **‹ Add a Person** **Search Criteria** **Search Criteria** Search Type Person • ☐ Ad Hoc Search Search Parameter PSRS_HIRE Search by SSN **Search Result Rule** ⑦
10.	The **Add a Person** page returns. Click the **Add Person** button. **‹ Cardinal Homepage** **Add a Person** ⋮ New Window	Help	Personalize Page **Add a Person** Person ID NEW [Add Person] Search for Matching Persons

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

Biographical Details	Contact Information	Regional	Organizational Relationships	VA Person Info

Person ID NEW

Name 🔍 | ⏮ ◀ 1 of 1 ⌄ ▶ ⏭ | View All

*Effective Date 10/10/2024 📅   [+] [–]

*Format Type English ⌄

Display Name [Add Name]

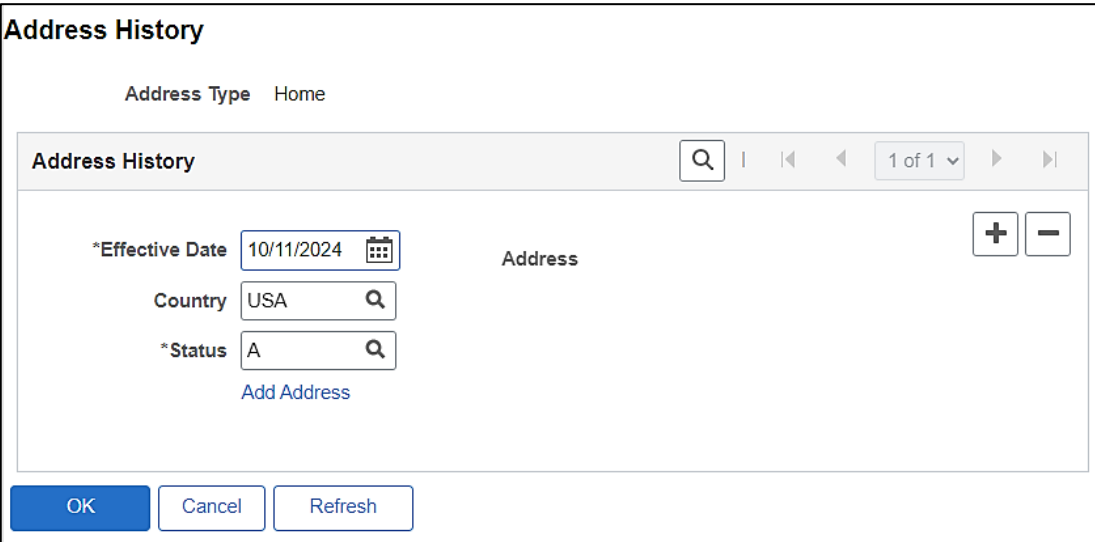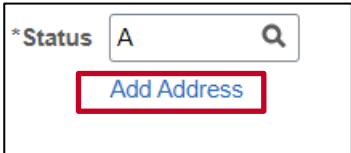| Step	Action
11.	The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire as needed. *Effective Date 10/10/2024 *Format Type English
(info)	The **Effective Date** cannot be greater than today's date when adding/modifying a person in Cardinal. 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. Add Name

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

	Name	×
		Help

English Name Format

Name Prefix [dropdown]
*First Name [   ]
Middle Name [   ]
*Last Name [   ]
Name Suffix [dropdown]

Display Name
Formal Name
Name

OK   Cancel   Refresh Name

Step	Action
13.	Optionally, click the **Name Prefix** dropdown button and select the applicable prefix. Name Prefix [dropdown]
14.	Enter the employee's first name in the **First Name** field (required). *First Name [ ]

Step	Action
15.	Optionally, enter the employee's middle name in the **Middle Name** field.
ℹ	Do not add a period behind the middle initial.
16.	Enter the employee's last name in the **Last Name** field (required). *Last Name [ ]
ℹ	Do not include suffixes (Jr, Sr, or IV) in the **Last Name** field.
17.	Click the **Name Suffix** dropdown button and select the applicable suffix as needed. Name Suffix [▾]
18.	Click the **OK** button. [OK] [Cancel] [Refresh Name]

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

> **Biographic Information**
>
> Date of Birth [📅]   Years   0   Months   0
> Birth Country USA   🔍   United States
> Birth State   🔍
> Birth Location [   ]   ☐ Exclude Contact Information?

Step	Action
19.	Click the **Date of Birth Calendar** icon and select the employee's date of birth (required). **Note**: the **Birth Country** field defaults to "USA". This can be updated but is not required as this data is not reported. **Biographic Information** Date of Birth [📅] Birth Country USA 🔍

Step	Action
20.	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). ☐ Exclude Contact Information?
21.	Scroll down to the **Biographical History** section.
	The **Biographical History** section displays. **Biographical History** — 1 of 1 — View All *Effective Date 10/11/2024 *Gender Unknown *Highest Education Level Not Indicated *Marital Status Unknown As of Language Code Alternate ID ☐ Full-Time Student
ℹ	The **Effective Date** field within this section defaults to the effective date selected above. Do not change.
22.	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. *Gender Unknown
ℹ	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 the information is obtained.
23.	Click the **Highest Education Level** dropdown button and select the employee's highest level of education. *Highest Education Level Not Indicated

Step	Action
24.	Click the **Marital Status** dropdown button and select the employee's legal marital status. *Marital Status [Unknown ⌄]
ⓘ	The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
25.	Scroll down to the **National ID** section.
	The **National ID** section displays. ▼ National ID 1-1 of 1 ⌄ ❙ View All *Country: USA — *National ID Type: Social Security Number — National ID: [ ] — Primary ID: ☑ — ＋ －
26.	Enter the employee's Social Security Number (SSN) in the **National ID** field. ▼ National ID 1-1 of 1 ⌄ ❙ View All *Country: USA — *National ID Type: Social Security Number — National ID: [ ] — Primary ID: ☑ — ＋ －
27.	Scroll back up to the top of the page and click the **Contact Information** tab. Biographical Details ❘ **Contact Information** ❘ Regional ❘ Organizational Relationships ❘ VA Person Info John Doe — Person ID NEW Name 1 of 1 ⌄ ❙ View All *Effective Date: 10/11/2024 ＋ － *Format Type: English Display Name: John Doe [Edit Name] **Biographic Information** Date of Birth: 10/11/1990 Years 34 Months 0 Birth Country: USA United States Birth State: [ ] Birth Location: [ ] ☐ Exclude Contact Information?

Step	Action
	The **Contact Information** tab displays.
28.	Click the **Add Address Detail** link.
	The **Address History** page displays.
ℹ	The **Effective Date** field within this section defaults to the date previously selected. Do not change.
29.	Click the **Add Address** link.

Step	Action
ℹ	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 information.

The **Edit Address** page displays.

Edit Address

Country	United States
Address 1	
Address 2	
Address 3	
City	State
Postal	
County	

OK   Cancel

Step	Action
30.	Enter the employee's address information using the applicable fields.
ℹ	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.
31.	Click the **OK** button.
	OK Cancel
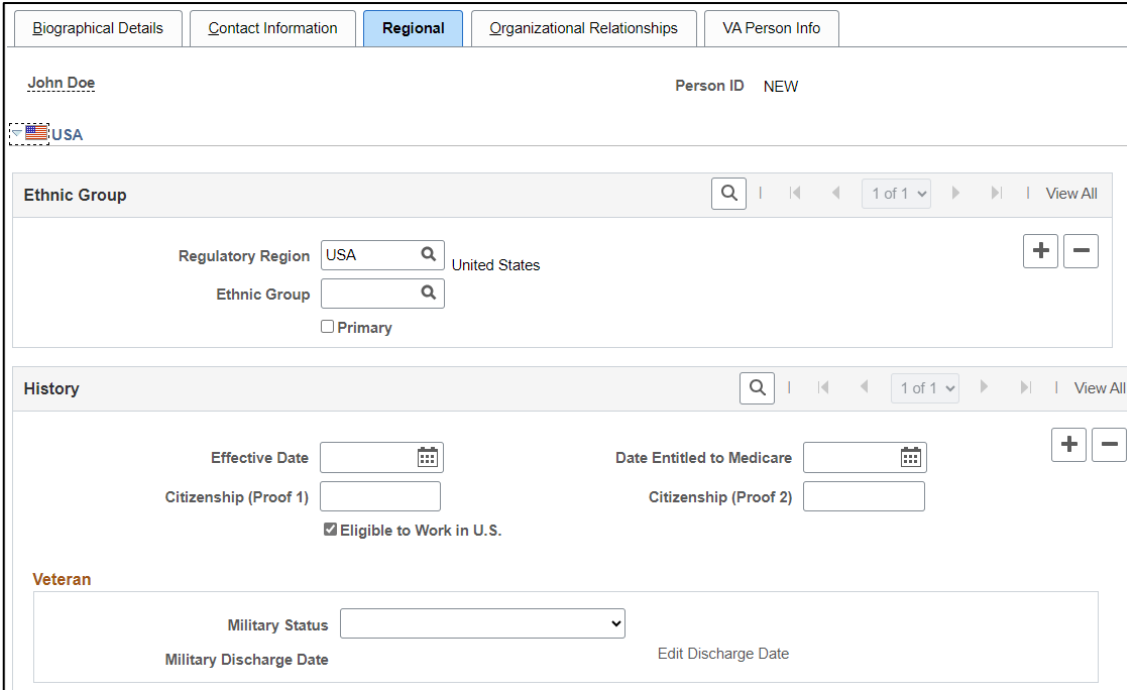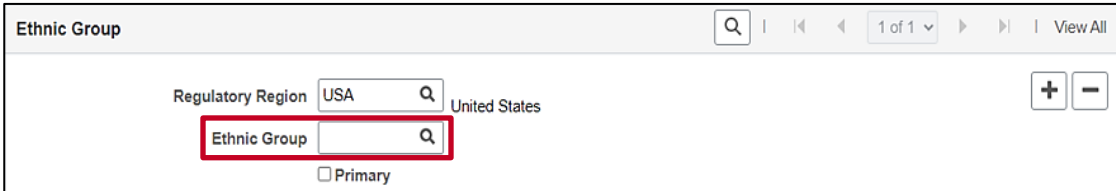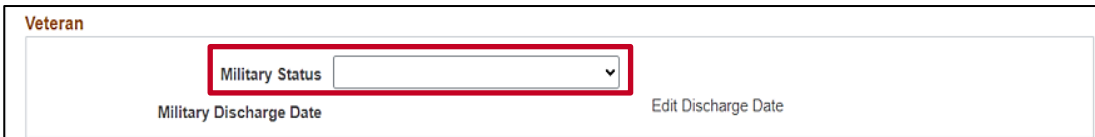
Step	Action
	The **Address History** page returns with the address information displayed. **Address History** Address Type Home **Address History** 1 of 1 *Effective Date 10/11/2024 Country USA *Status A Add Address Address 123 Main Street Richmond, VA 12345 OK Cancel Refresh
32.	Click the **OK** button.
	The **Contact Information** tab redisplays. Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info John Doe Empl ID NEW **Current Addresses** 1-1 of 1 View All 	Address Type	As Of Date	Status	Address	
Home	10/11/2024	A	123 Main Street Richmond, VA 12345	Edit/View Address Detail | **Phone Information** 1-1 of 1 View All | *Phone Type	Telephone	Extension	Preferred	
			☐		
33.	Click the **Phone Type** dropdown button and select the type of phone. 	*Phone Type	Telephone	Extension	Preferred	
▼			☐	+ −	

Step	Action
34.	Enter the applicable telephone number in the **Telephone** field.

*Phone Type	Telephone	Extension	Preferred		
Mobile ⌄			☐	+	−

ℹ️	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.

35.	Click the **Preferred** checkbox option to identify the employee's preferred phone number.

*Phone Type	Telephone	Extension	Preferred		
Mobile ⌄	888/888-8888		☐	+	−

36.	Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (**+**) and then repeating steps 33 - 35.
37.	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

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

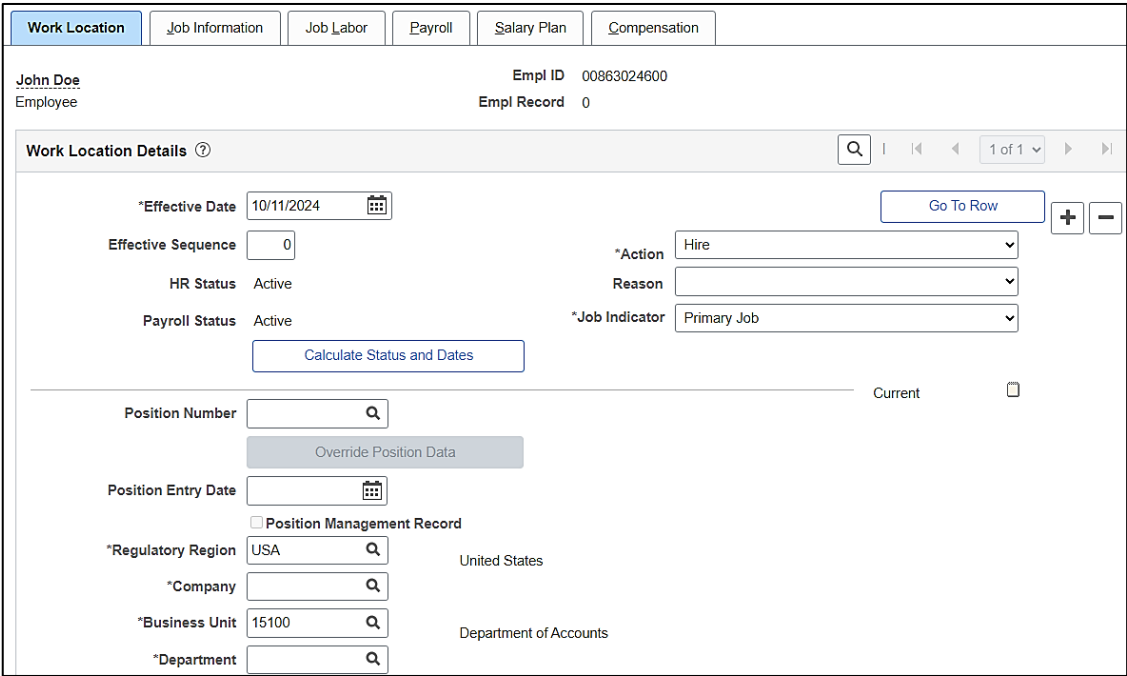| *Email Type	*Email Address	Preferred		
⌄		☐	+	−

Step	Action
38.	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 v. Notify the employee of their email address and provide information to register for Cardinal Employee Self Service using this email. b. If the employee's business email has been requested, but not yet assigned or the employee chooses not to provide a personal email: i. Click the **Pending Agency Provided Email** option ii. Click **Email Type** dropdown button and select "Business" iii. Enter "noemail@virginia.gov" in the **Email Address** field iv. Select the Preferred checkbox option c. If a business email will not be provided to the employee: i. Click the **Employee Provided Email** option ii. Click the **Email Type** dropdown button and select "Personal" iii. Enter the email address in the **Email Address** field iv. Select the **Preferred** checkbox option
	Once the employee's business email is obtained, the **Pending Agency Provided Email** address must be replaced with the new business email address. The email address must be provided to the employee as they will need it to register and access Cardinal Employee Self-Services (ESS). If this is not updated, the employee will not be able to register for access to Cardinal ESS. **Note**: For employees with multiple jobs at different Agencies, the business email must match the Agency of their primary job. • If an employee has both an hourly (wage) and a salaried job, the salaried job will always be the primary job • If an employee has multiple hourly jobs, the oldest job is considered primary For further information on updating email addresses, refer to the Job Aid titled **HR351 Viewing and Modifying Personal Data**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
39.	Scroll back up to the top of the page and click the **Regional** tab. Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info
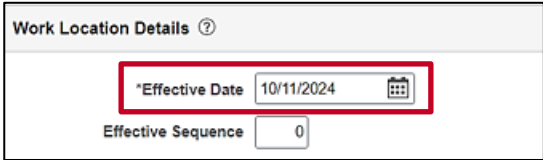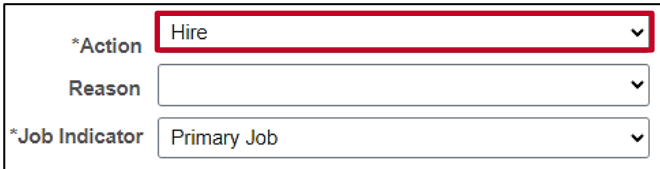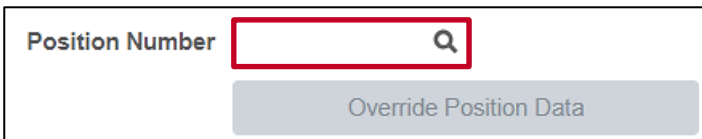
Step	Action
	The **Regional** tab displays.
40.	The fields within the **Ethnic Group** are both optional. The **Regulatory Region** field defaults to "USA". Do not change.
41.	Click the **Ethnic Group Look Up** icon and select the employee's ethnic group.
ⓘ	If the employee identifies with multiple ethnic groups, click the **Add a New Row** icon (**+**) and repeat this step.
42.	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.

Step	Action
43.	The remaining sections on this tab are not currently being utilized in Cardinal. Click the **VA Person Info** tab. The **Organizational Relationships** tab will be addressed after reviewing/completing the **VA Person Info** tab. Biographical Details | Contact Information | **Regional** | Organizational Relationships | **VA Person Info**

The **VA Person Info** tab displays.

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

John Doe   Person ID   NEW

Power Of Attorney [   ]   Linked Participant EmplID [   ]

Preferred Pronoun [▼]   Preferred Gender [▼]

Save   Notify   Refresh   Add   Update/Display   Include History

Step	Action
44.	Enter the name of the person who has legal Power of Attorney for the employee in the **Power of Attorney** field. Power Of Attorney [ ]
(i)	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.
45.	If the employee is linked to another employee of the Commonwealth of Virginia, enter that employee ID in the **Linked Participant EmplID** field. Power Of Attorney [ ] Linked Participant EmplID [ ] Preferred Pronoun [▼] Preferred Gender [▼]
46.	Click the **Preferred Pronoun** dropdown button and select the preferred pronoun provided by the employee. Power Of Attorney [ ] Linked Participant EmplID [ ] Preferred Pronoun [▼] Preferred Gender [▼]

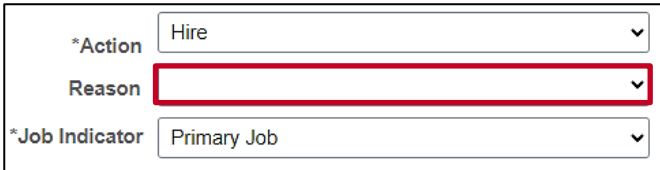| Step	Action
47.	Click the **Preferred Gender** dropdown button and select the preferred gender provided by the employee.
	 Power Of Attorney [ ] Linked Participant EmplID [ ] Preferred Pronoun [v] Preferred Gender [v]
48.	Click the **Organizational Relationships** tab.
	Biographical Details Contact Information Regional Organizational Relationships VA Person Info

The **Organizational Relationships** tab displays.

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

John Doe Person ID NEW

Choose Org Relationship to Add

☐ Employee
☐ Contingent Worker
☐ Person of Interest

Select Checklist Code [v] ≫

Add Relationship

Save Notify Refresh Add Update/Display Include History

Step	Action
49.	Click the **Employee** checkbox option. The **Hire** checklist appears in the **Select Checklist Code** field after selecting the **Employee** checkbox option.
	☑ Employee ☐ Contingent Worker ☐ Person of Interest Empl Record 0 Select Checklist Code [Hire v] ≫
50.	Click the **Add Relationship** button. Add Relationship

Step	Action
ⓘ	This is the step where information entered for the employee's personal data is validated. If there is any missing required information, Cardinal will generate an alert at this point.
	Do not click the **Back** button in the browser to go back, as all information that has been entered will be lost.
	Review the message and go to the tab where the missing information is captured to enter it. Once entered, return back to the **Organizational Relationships** tab and click the **Add Relationship** button again.

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

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation

John Doe — Empl ID 00863024600
Employee — Empl Record 0

Work Location Details ⓘ — 🔍 | |◁ ◁ 1 of 1 ▽ ▷ ▷|

*Effective Date	10/11/2024 📅	Go To Row [+] [−]
Effective Sequence	0	*Action: Hire
HR Status	Active	Reason:
Payroll Status	Active	*Job Indicator: Primary Job
	Calculate Status and Dates	Current ☐
Position Number	🔍	
	Override Position Data	
Position Entry Date	📅	
	☐ Position Management Record	
*Regulatory Region	USA 🔍	United States
*Company	🔍	
*Business Unit	15100 🔍	Department of Accounts
*Department	🔍	

ⓘ	Cardinal will auto-assign the Employee ID Number. It is located at the top of the **Work Location** tab. Take note of the assigned Employee ID Number.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation

John Doe — Empl ID 00863024600
Employee — Empl Record 0

Step	Action
51.	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, it can be updated now. Work Location Details ⑦ *Effective Date 10/11/2024 📅 Effective Sequence 0
ⓘ	A help desk ticket is required to adjust the new employee's effective date after their Job Record is saved.
52.	The **Action** field defaults to "Hire" and no other selections are available. *Action Hire ⌄ Reason ⌄ *Job Indicator Primary Job ⌄
53.	Click the **Reason** dropdown button and select "New Hire". *Action Hire ⌄ Reason ⌄ *Job Indicator Primary Job ⌄
ⓘ	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**.
54.	Enter the employee's Position Number in the **Position Number** field and then tab out of the field. Position Number 🔍 Override Position Data
ⓘ	The remaining position related fields on this page will auto-populate once the Position Number is entered and tab out of the **Position Number** field.

Step	Action
55.	Click the **Job Information** tab. ![Work Location, Job Information (highlighted), Job Labor, Payroll, Salary Plan, Compensation tabs. John Doe, Employee. Empl ID 00863024600, Empl Record 0]
	The **Job Information** tab displays. ![Job Information tab detail showing Job Information Details section. John Doe, Employee. Empl ID 00863025100, Empl Record 0. Effective Date 10/14/2024, Effective Sequence 0, HR Status Active, Payroll Status Active, Action Hire, Job Indicator Primary Job, Current. Job Code 19013 Admin and Office Spec III, Entry Date 10/14/2024, SOC Code 43-9199, Supervisor Level E, Reports To DLI00158 View Current Incumbents, Employee Boiler Inspector, Supervisor Name DLI00158, Regular/Temporary Regular, Full/Part Full-Time, Empl Class, Officer Code None, Regular Shift Not Applicable, Shift Rate, Classified Ind Classified, Shift Factor. Standard Hours: Standard Hours 40.00, Work Period W Weekly, FTE 1.000000, Adds to FTE Actual Count?, Encumbrance Override. Contract Number: Contract Number, Next Contract Number, Contract Type]
56.	Review the information within the **Job Information Details** section. These values are populated when the Position Number is selected on the **Work Location** tab.
57.	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**. ![Regular/Temporary Regular, Empl Class dropdown highlighted]

Step	Action
ℹ	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.
58.	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 (e.g., 34, 35, 36, etc.) and tab out of the field. Standard Hours: 40.00
ℹ	The **FTE** field will calculate after tabbing out of the **Standard Hours** field. The **Full/Part** field defaults based on the information entered for the position.
59.	The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab. Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation John Doe — Employee Empl ID 00863025100 Empl Record 0

The **Payroll** tab displays.

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

John Doe
Employee

Empl ID   00863024700
Empl Record   0

Payroll Information ⓘ   🔍 |◁ ◁ 1 of 1 ▽ ▷ ▷|

Effective Date 10/14/2024	Go To Row
Effective Sequence 0	Action Hire
HR Status Active	Reason New Hire
Payroll Status Active	Job Indicator Primary Job
	Future

*Payroll System   Payroll for North America
Absence System   Other

Payroll for North America ⓘ

Pay Group 🔍	
Employee Type 🔍	Holiday Schedule 🔍
Tax Location Code 🔍	
GL Pay Type	FICA Status Subject
Combination Code	Edit ChartFields

Job Data   Employment Data   Earnings Distribution   Benefits Program Participation

[OK]   [Cancel]   [Apply]
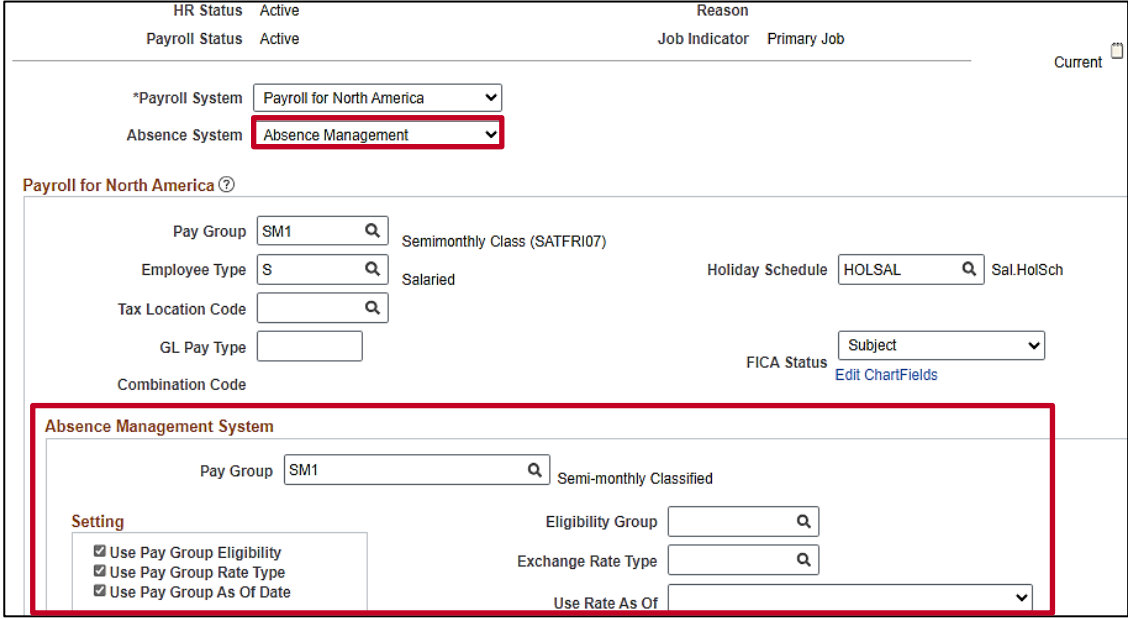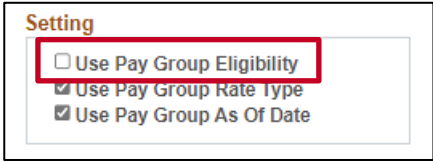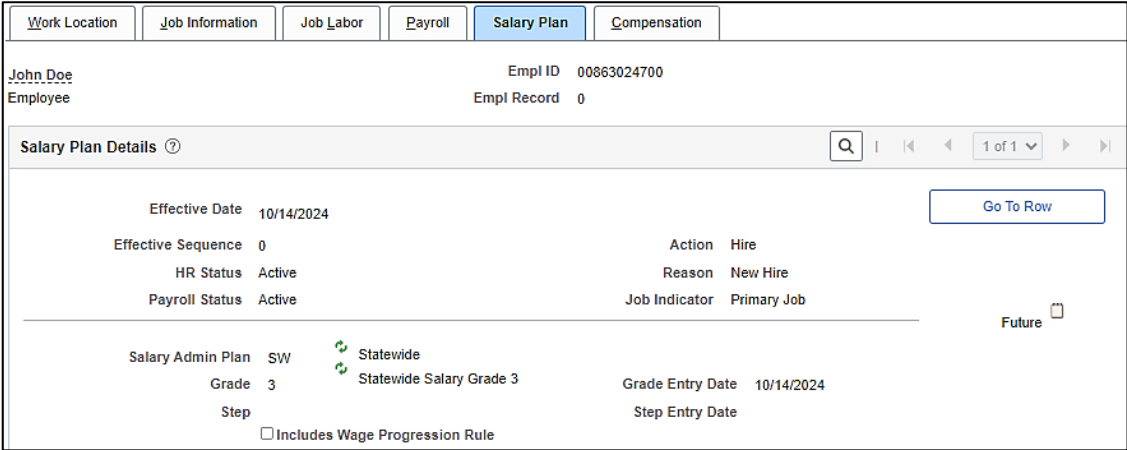
Step	Action
(i)	The **Payroll System** field defaults to "Payroll for North America". Do not change.
60.	The **Absence System** field defaults to "Other". If the Agency uses Cardinal Absence Management and the employee is salaried, click the **Absence System** dropdown button and select "Absence Management". If the 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".

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

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

Step	Action
62.	The **FICA Status** field defaults to "Subject" for regular Social Security and Medicare tax withholdings. Update as needed based upon the following guidance: • "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 FICA Status [Subject ▾] Edit ChartFields
63.	The **Employee Type** and **Holiday Schedule** fields default based on the Pay Group selected. 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. HR Status Active Reason Payroll Status Active Job Indicator Primary Job Current *Payroll System [Payroll for North America ▾] Absence System [Absence Management ▾] **Payroll for North America** ⓘ Pay Group [SM1 🔍] Semimonthly Class (SATFRI07) Employee Type [S 🔍] Salaried Holiday Schedule [HOLSAL 🔍] Sal.HolSch Tax Location Code [🔍] GL Pay Type [ ] FICA Status [Subject ▾] Combination Code Edit ChartFields **Absence Management System** Pay Group [SM1 🔍] Semi-monthly Classified **Setting** Eligibility Group [🔍] ☑ Use Pay Group Eligibility Exchange Rate Type [🔍] ☑ Use Pay Group Rate Type ☑ Use Pay Group As Of Date Use Rate As Of [▾]
64.	Click the **Tax Location Code Look Up** icon and select the applicable code based on the location of the employee's office. Tax Location Code [🔍]

Step	Action
65.	The **Use Pay Group Eligibility** checkbox option is selected by default. De-select this checkbox option. **Setting** ☐ Use Pay Group Eligibility ☑ Use Pay Group Rate Type ☑ Use Pay Group As Of Date
66.	Click the **Eligibility Group Look Up** icon and select the applicable Eligibility Group for the employee. Eligibility Group ⬜ 🔍
ℹ	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**.
67.	Scroll up to the top of the page as needed and click the **Salary Plan** tab. Work Location | Job Information | Job Labor | Payroll | **Salary Plan** | Compensation John Doe — Empl ID 00863024700 Employee — Empl Record 0

The **Salary Plan** tab displays.

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

John Doe — Empl ID 00863024700
Employee — Empl Record 0

Salary Plan Details ⓘ — 🔍 \| |◄ ◄ 1 of 1 ▼ ► ►|

Effective Date 10/14/2024	Go To Row
Effective Sequence 0	Action Hire
HR Status Active	Reason New Hire
Payroll Status Active	Job Indicator Primary Job
	Future ⬜
Salary Admin Plan SW ⟳ Statewide	
Grade 3 ⟳ Statewide Salary Grade 3	Grade Entry Date 10/14/2024
Step	Step Entry Date
☐ Includes Wage Progression Rule	

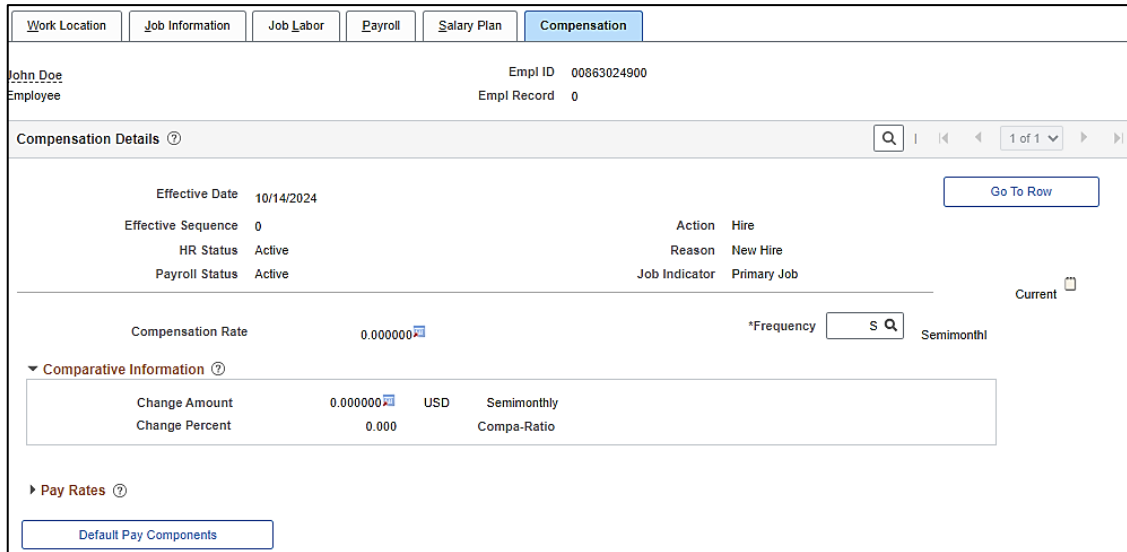| Step	Action
68.	Review the Salary Plan information. This information comes from the position.
ℹ	If the Salary Plan information is incorrect, cancel the action and make corrections to the Position before assigning the employee to the Position. The Salary Admin Plan/Grade may change for the employee 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**.
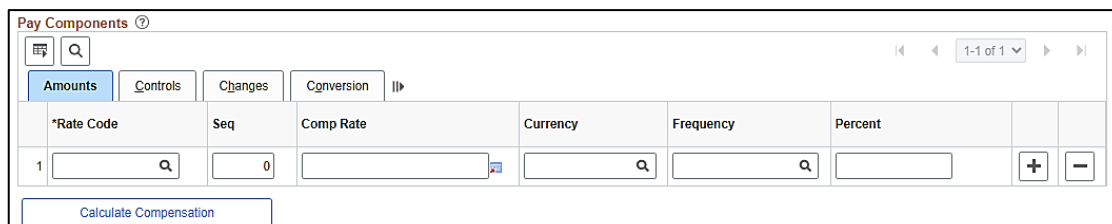
Step	Action
69.	If the Salary Plan information is correct, click the **Compensation** tab. Work Location Job Information Job Labor Payroll **Salary Plan** Compensation John Doe Empl ID 00863024700 Employee Empl Record 0

The **Compensation** tab displays.

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

John Doe   Empl ID   00863024900
Employee   Empl Record   0

Compensation Details   1 of 1

Effective Date   10/14/2024   Go To Row

Effective Sequence   0   Action   Hire
HR Status   Active   Reason   New Hire
Payroll Status   Active   Job Indicator   Primary Job

Current

Compensation Rate   0.000000   *Frequency   S   Semimonthl

▼ Comparative Information

Change Amount   0.000000   USD   Semimonthly
Change Percent   0.000   Compa-Ratio

▶ Pay Rates

Default Pay Components

Step	Action
70.	If not already populated, enter or select the employee's pay frequency in the **Frequency** field (e.g., "S" for Semimonthly; "H" for Hourly). *Frequency S Semimonthl
71.	Click the **Default Pay Components** button. Default Pay Components
72.	Scroll down to the **Pay Components** section as needed.

The **Pay Components** section displays.

Pay Components

	Amounts	Controls	Changes	Conversion					1-1 of 1	
	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1		0					+	−

Calculate Compensation

Step	Action
73.	Click the **Rate Code Look Up** icon and select the applicable Rate Code. | *Rate Code	Seq	Comp Rate	Currency	Frequency	Percent | 1 [🔍]	0		[🔍]	[🔍]		[+] [−]
74.	Enter the compensation to pay the employee (Annual Salary or Hourly Rate) in the **Comp Rate** field. | *Rate Code	Seq	Comp Rate	Currency	Frequency	Percent | 1 [🔍]	0		[🔍]	[🔍]		[+] [−]
75.	The **Currency** and **Frequency** fields default based on the Rate Code selected.
ⓘ	If multiple Rate Codes need to be entered, click the **Add a New Row** icon (**+**) and repeat steps 73 - 75. | *Rate Code	Seq	Comp Rate	Currency	Frequency	Percent | 1 [🔍]	0		[🔍]	[🔍]		[+] [−]
76.	Click the **Calculate Compensation** button. [Calculate Compensation]

The **Compensation** tab refreshes.

Pay Components ⓘ

	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	STATE 🔍	0	40,000.000000	USD 🔍	A 🔍		+	−
2	NONST 🔍	0	10,000.000000	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]

Step	Action
77.	Click the **Employment Data** link at the bottom of the page. Job Data [Employment Data] Earnings Distribution Benefits Program Participation

Step	Action
	The **Employment Information** page displays.
78.	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.
79.	Scroll down on the page.

Step	Action
ℹ	Before recording the employee's telework status, the Agency HR administrator should verify if the employee will be teleworking. 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**.
80.	Click the **Employee Eligible for Telework** dropdown button and select the applicable value based on the employee's eligibility for telework.
ℹ	If the Agency does not use Cardinal Absence Management, the **Alternate Leave Plan** field must be completed based on the employee's leave program (e.g., VSDP Elig Group) in order for the employee to have a complete Total Compensation statement in Cardinal ESS.
81.	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.

Step	Action
82.	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). Person Employment Dates Continuous State Service Date: 10/18/2024 Annual Leave Eligibility Date: 10/18/2024 Previous State Service Months: 0 Veteran's Service Credit Months: 0 Total Service Credit Months: 0
83.	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. Person Employment Dates Continuous State Service Date: 10/18/2024 Annual Leave Eligibility Date: 10/18/2024 Previous State Service Months: 0 Veteran's Service Credit Months: 0 Total Service Credit Months: 0
84.	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. Person Employment Dates Continuous State Service Date: 10/18/2024 Annual Leave Eligibility Date: 10/18/2024 Previous State Service Months: 0 Veteran's Service Credit Months: 0 Total Service Credit Months: 0
ℹ	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.

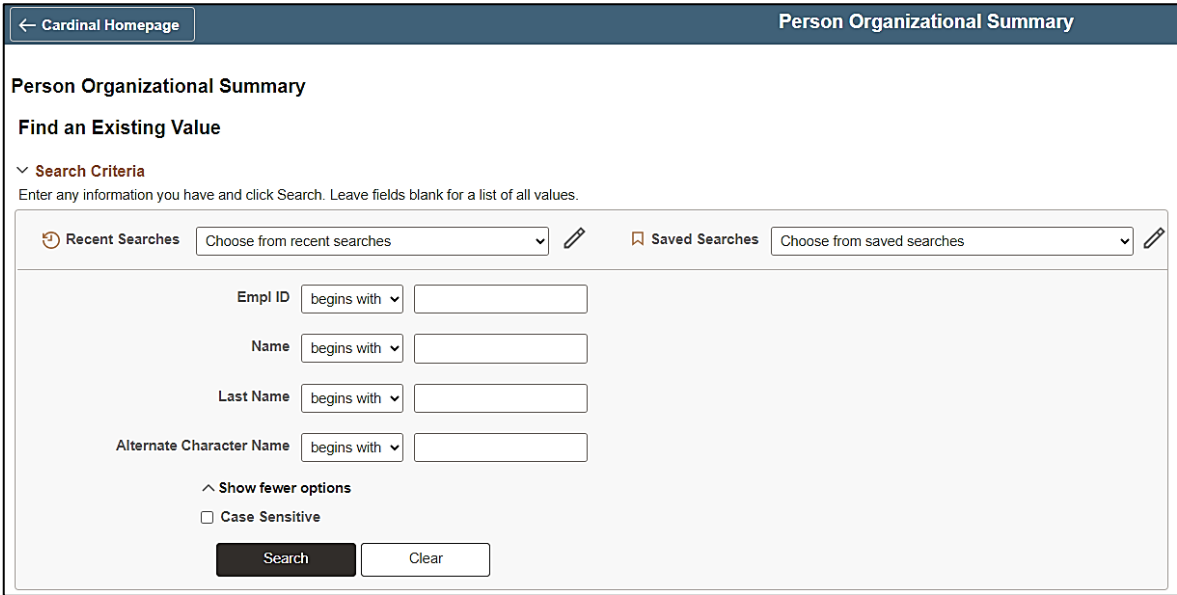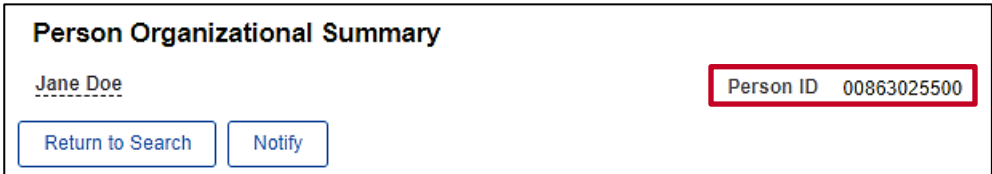| Step	Action
85.	Complete the **Annual Leave Eligibility Date** field by selecting either: • The employee's hire date if they have no prior State service or veteran's service credit months • The calculated Annual Leave Eligibility Date that was determined using the **HR351 Managing Service Dates Calculator** (if the employee has prior State service or veteran's service credit months) **Person Employment Dates** ⓘ Continuous State Service Date 10/18/2024 Previous State Service Months 0 Annual Leave Eligibility Date 10/18/2024 Veteran's Service Credit Months 0 Total Service Credit Months 0
ⓘ	The **Annual Leave Eligibility Date** field must be updated for all VPA covered employees and salaried employees for Agencies that use Cardinal 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**.
86.	Click the **Benefits Program Participation** link at the bottom of the page. Job Data Employment Data Earnings Distribution Benefits Program Participation
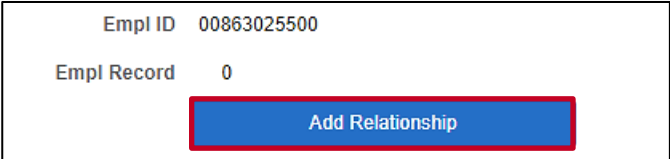
Step	Action

The **Benefits Program Participation** page displays.

Step	Action
87.	Complete the **Elig Fld 2**, **Elig Fld 3**, **Elig Fld 8**, and **Elig Fld 9** fields based on the following: • **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 "Y" when time is entered by the employee or select "N" when time is entered by a Timekeeper or time is interfaced. Elig Fld 3 should only be completed for PY/TA agencies. Otherwise, Elig Fld 3 should be left blank. Selecting "Y" gives the employee modify access to the timesheet. Selecting "N" or leaving the field blank gives the employee view only access to the timesheet • **Elig Fld 8** - select the applicable pay frequency (e.g., 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) **Benefits Administration Eligibility** ⓘ BAS Group ID [🔍] Elig Fld 1 Elig Fld 2 [🔍] Elig Fld 3 [🔍] Elig Fld 4 [🔍] Elig Fld 5 [🔍] Elig Fld 6 Elig Fld 7 [🔍] Elig Fld 8 [🔍] Elig Fld 9 [🔍]
ⓘ	Do not make any updates to the **Benefit Program Participation Details** section. 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**.
88.	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. Job Data Employment Data Earnings Distribution Benefits Program Participation
ⓘ	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**, and **Elig Fld 9**.
89.	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.
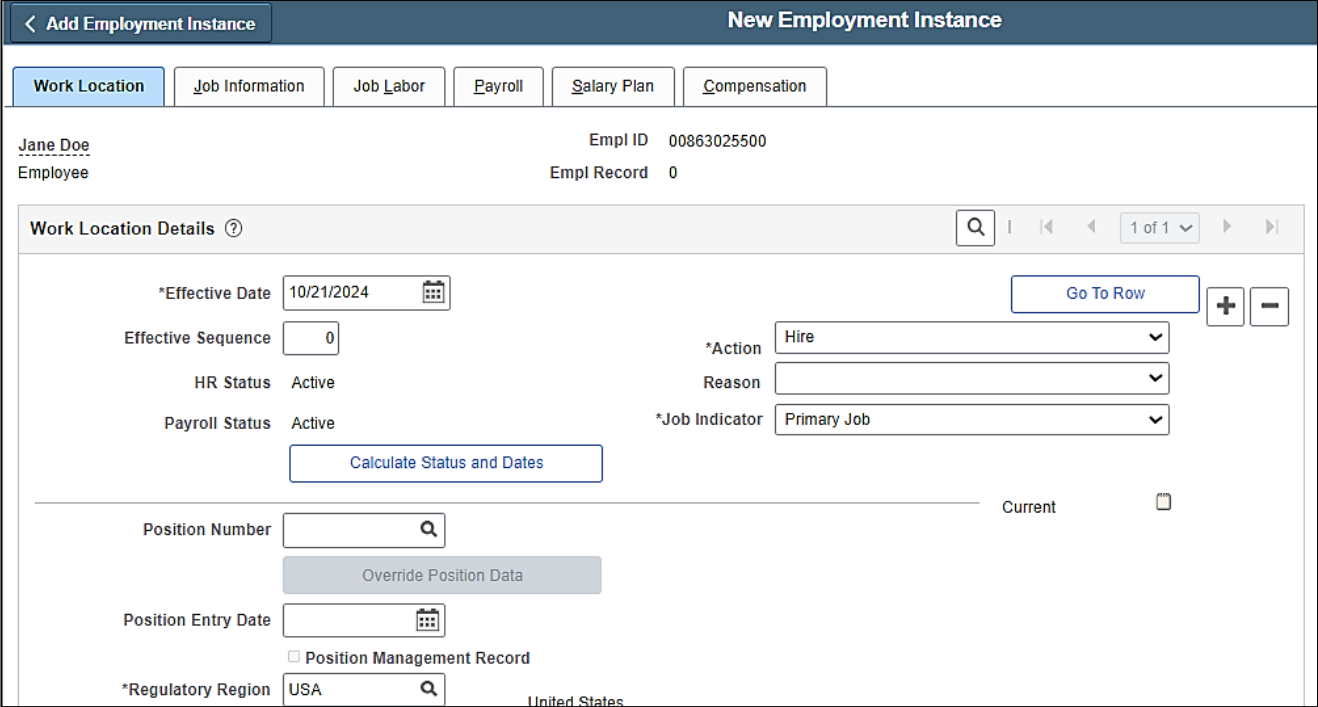
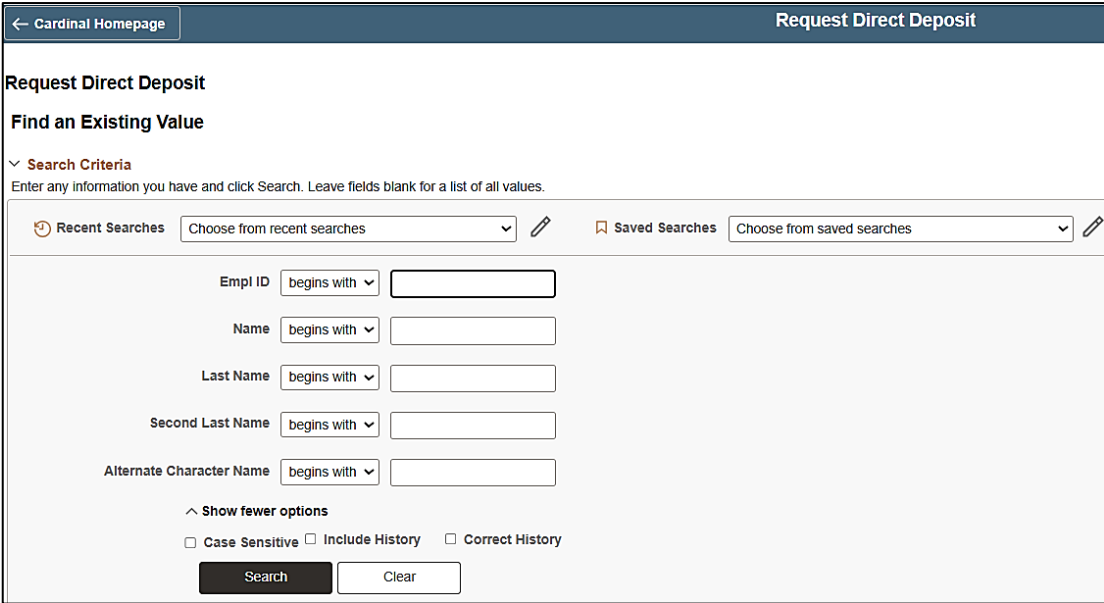| Step	Action
1.	Navigate to the **Person Organizational Summary** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Person Organizational Summary**
	The **Person Organizational Summary Find an Existing Value** page displays.
2.	Enter any search criteria and then click the **Search** button.
3.	Copy the Employee ID from the **Person ID** field.
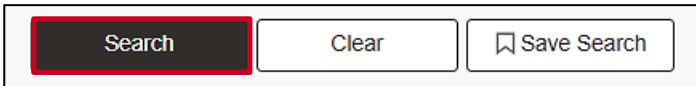
Step	Action
4.	Navigate to the **Add Employment Instance** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance**

The **New Employment Instance** page displays.

Validate that the correct Employee ID and Employee Record Number are displayed. For a brand-new hire, the employee record should be Employee Record Number "0".

Step	Action
5.	Click the **Add Relationship** button.

Step	Action
	The **New Employment Instance** page displays with the **Work Location** tab displayed by default.
6.	Complete the hire as detailed in the [Completing a New Hire](#) section of this Job Aid beginning with Step 52.
ℹ	If the employee being hired has no employee record with the Agency (requiring the use of "Hire" Action, "New Hire" Reason), but has other employment records in Cardinal, review the Direct Deposit information to confirm accuracy. Follow the steps below to review Direct Deposit information.
7.	For Agencies using Cardinal Payroll, navigate to the **Request Direct Deposit** page using the following path: **NavBar > Menu > Payroll for North America > Employee Pay Data USA > Request Direct Deposit**

Step	Action
	The **Request Direct Deposit Search** page displays. *(screen capture of the Request Direct Deposit "Find an Existing Value" search page)*
ℹ	The **Request Direct Deposit** page is a Read Only page available under the HR Administrator role. For more information pertaining to viewing the **Direct Deposit** page, see the **Viewing the Direct Deposit Page** section of the Job Aid titled, **PY382 Reviewing the Payroll Read Only Pages** located on the Cardinal website in **Job Aids** under **Learning**.
8.	Enter the rehired Employee's ID in the **Empl ID** field. *(screen capture showing Empl ID field highlighted)*
9.	Click the **Search** button. *(screen capture showing Search button highlighted)*

![Cardinal logo]

Step	Action
	The **Request Direct Deposit** page displays for the employee.
10.	Review the previous Direct Deposit information and verify it matches the rehire paperwork.

Step	Action
11.	If the Direct Deposit information differs from the Direct Deposit form provided by the employee during onboarding, the HR Administrator must reach out to the Agency Payroll Administrator promptly to have the Direct Deposit information updated in Cardinal prior to Payroll confirmation.
12.	Continue to the Agency Next Steps After Entering the 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 the telework agreement if one has been established/approved.

- o For further information on entering citizenship information, updating personal data, and the 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 the 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:

- o Each employee has one Direct Deposit record, and all active accounts on the Direct Deposit page are used by every Agency that pays the employee (via Cardinal). These records are not inactivated at separation because the employee may still be working for another Agency.
- o 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 Virginia.

Please coordinate with the Agency Payroll Administrator.

Coordinate with an Agency Benefits Administrator to ensure that eligible employees complete their benefit elections (within 30 days per OHB policy).

- o For further information on completing benefit elections, see the Job Aid titled **BN361 Completing a New Hire Enrollment**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**

Coordinate with an Agency Time and Labor (TL) Administrator 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 (e.g., overtime, comp leave, etc.).

- o For further information on assigning Work Schedules, see Job Aid titled **TA Maintaining Employee Work Schedules**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**