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.

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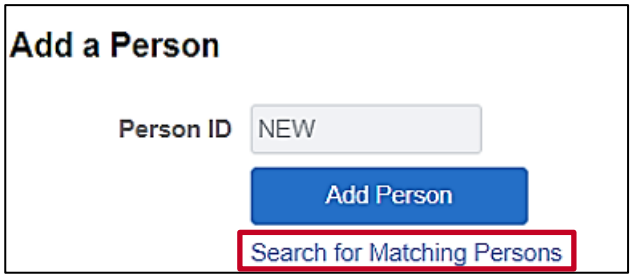
Revision History

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.

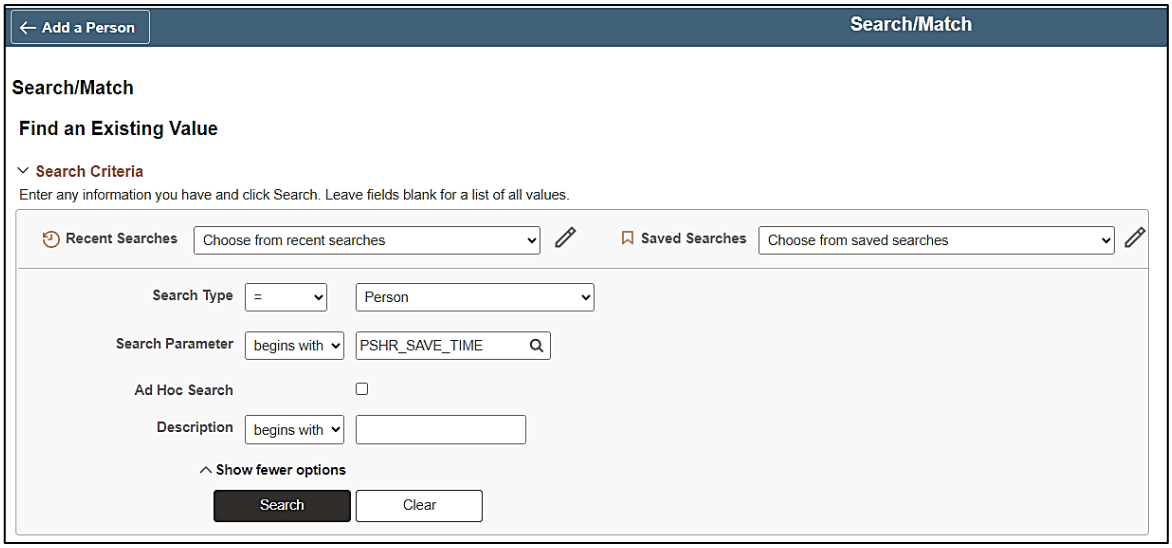
Completing a New Hire

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

Step	Action

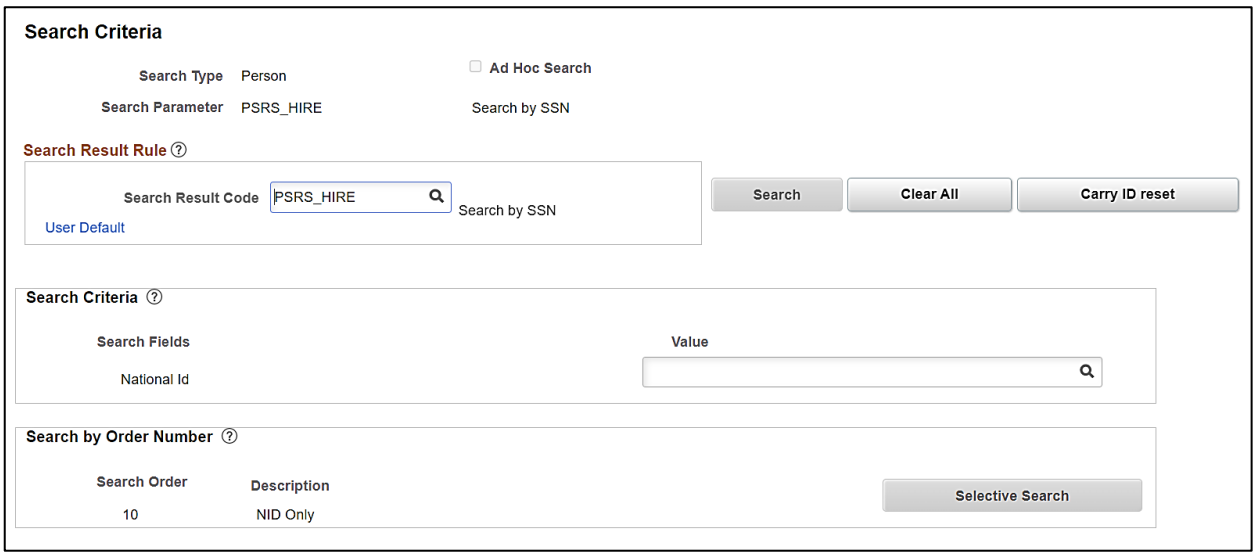
The **Search/Match Find an Existing Value** page displays.

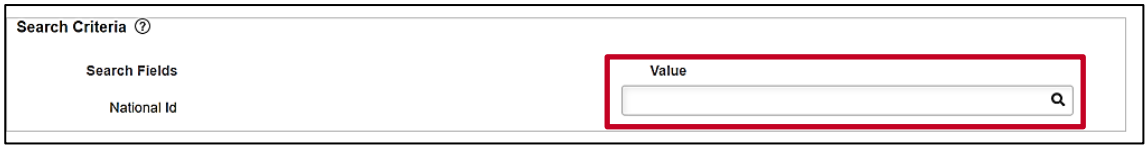
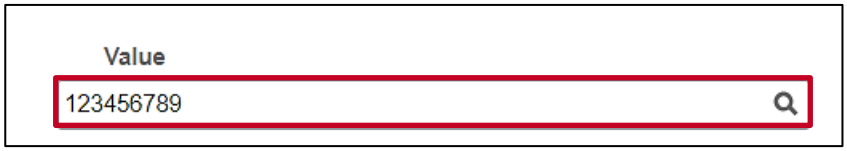
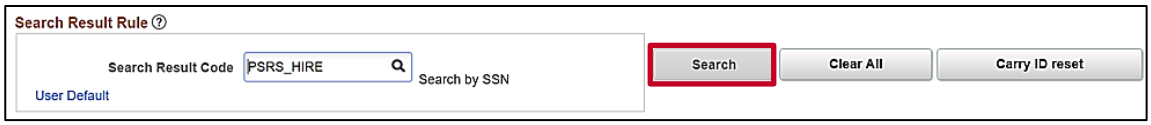
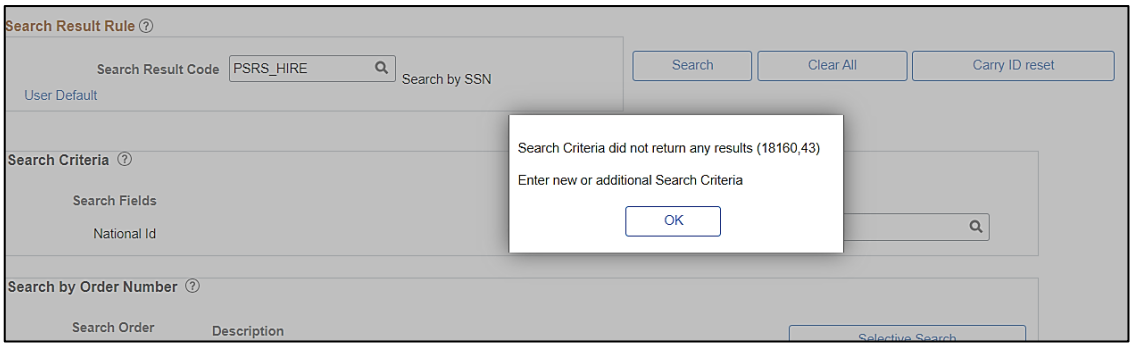


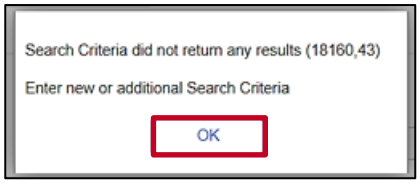
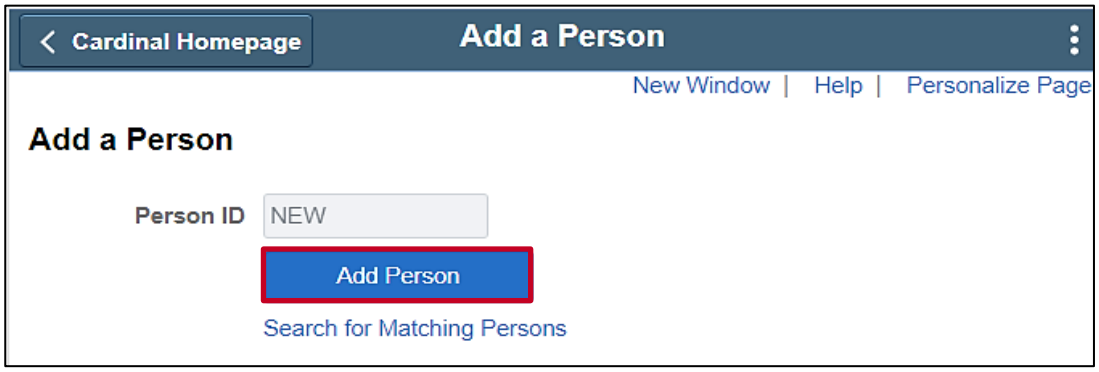
3. Click the **Clear** button.

4. Click the **Search** button.

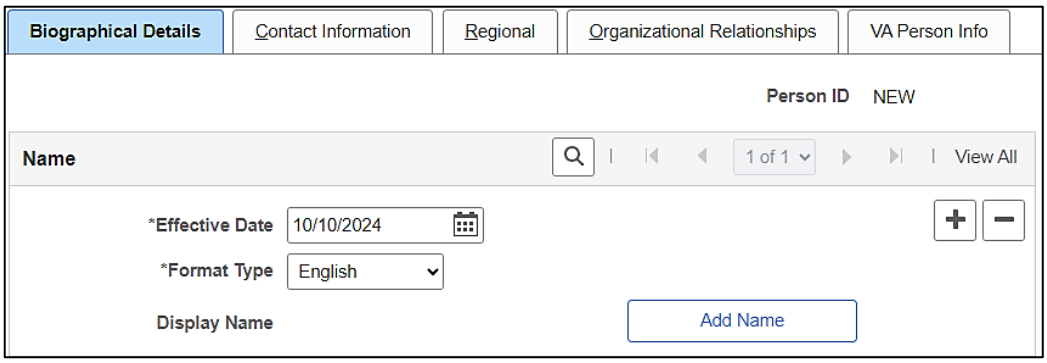
The **Search Criteria** page displays.

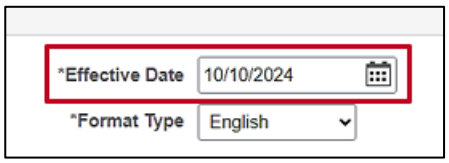
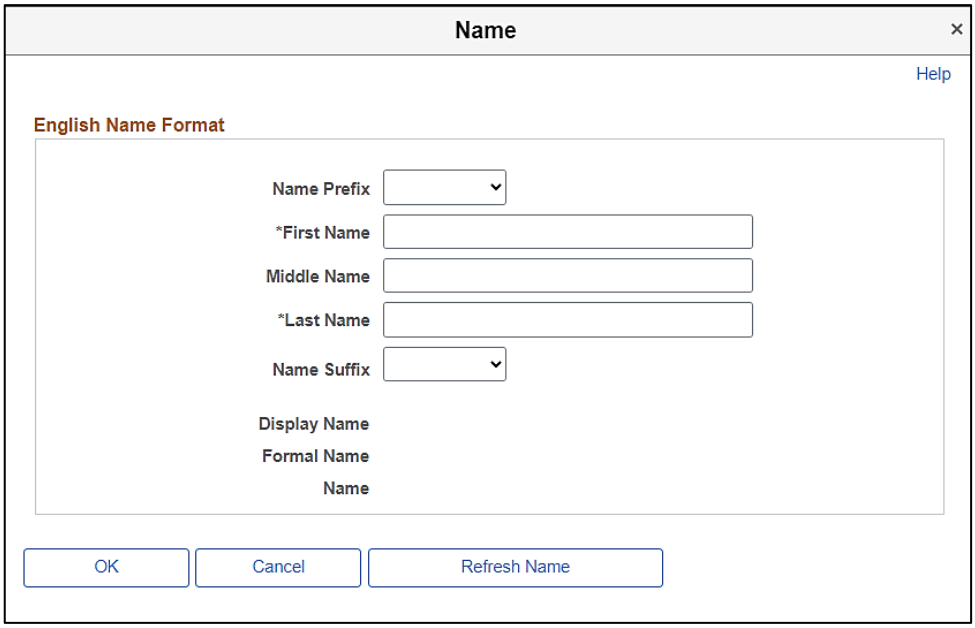


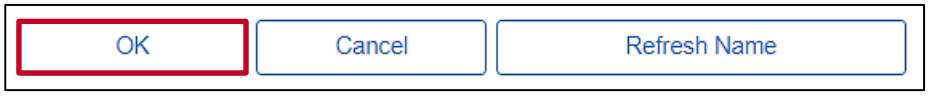
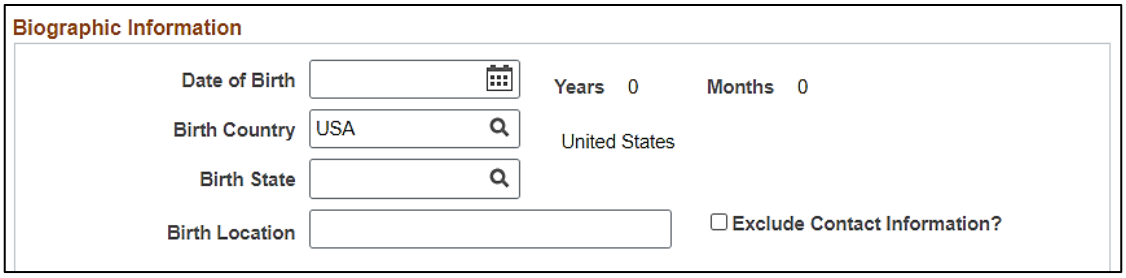
Step	Action
5.	Enter the employee's SSN into the **Value** field within the **Search Criteria** section. 
6.	Press the **Tab** key on the keyboard to enable the **Search** button to the right of the **Search Result Rule** section.
	The SSN is reformatted automatically (e.g., dashes are removed if they were entered). 
7.	Click the **Search** button. 
The Search Criteria results message displays in a pop-up window. 	
	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**.

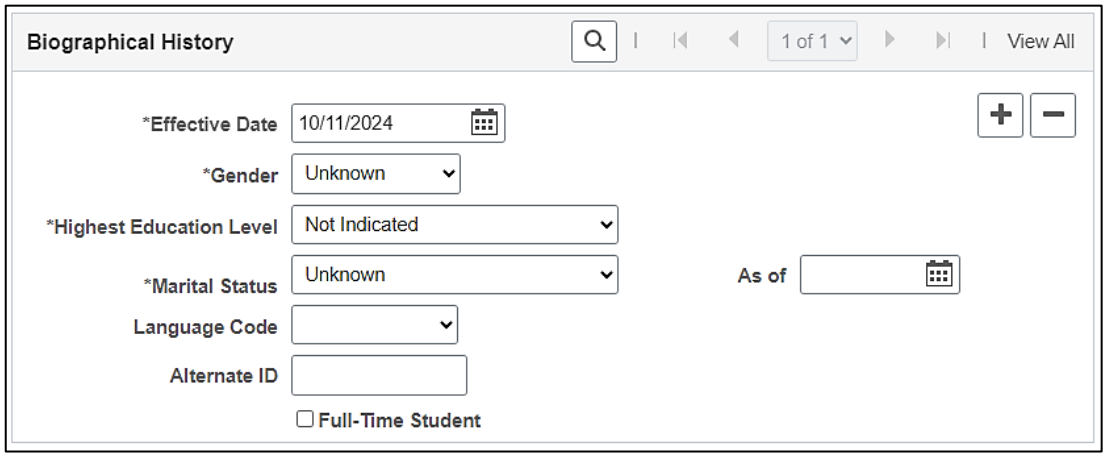
Step	Action
8.	Click the **OK** button to close the Search Criteria message. 
9.	The **Search Criteria** page returns. Click the **Add a Person** tab in the top left corner of the page.
10.	The **Add a Person** page returns. Click the **Add Person** button. 

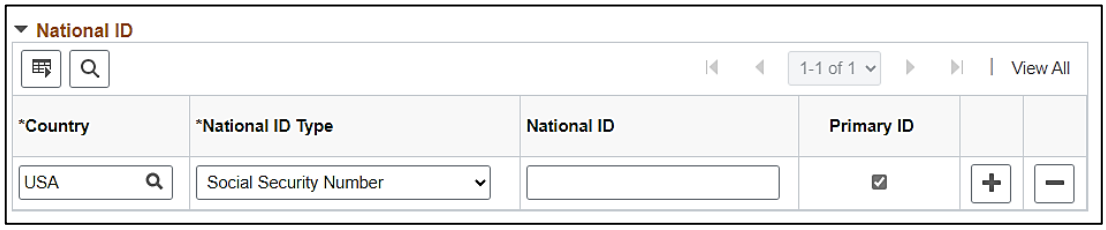
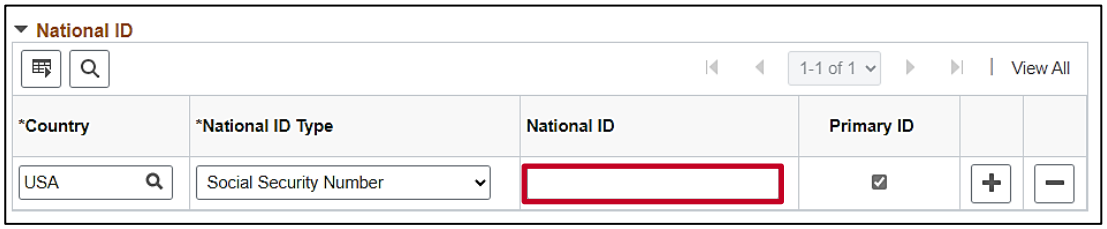
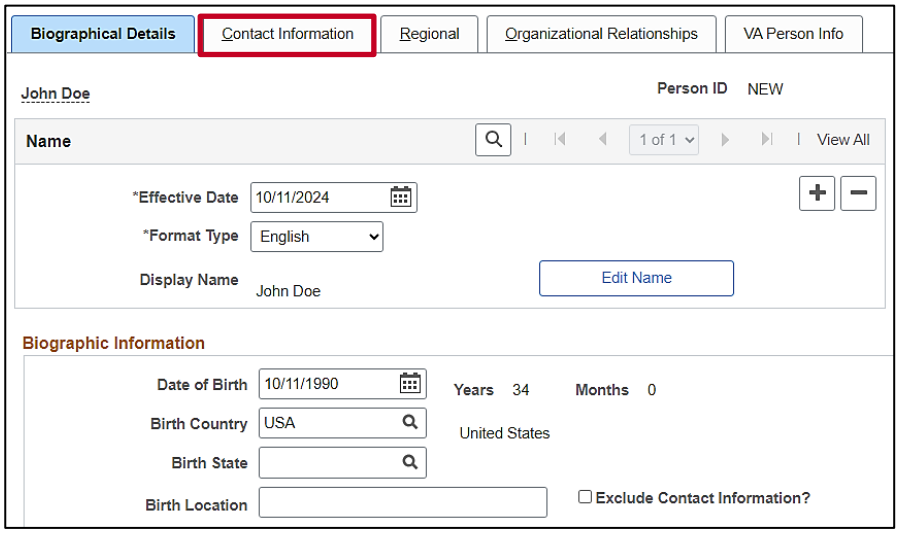
The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

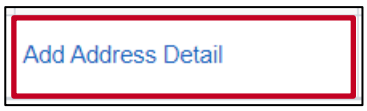
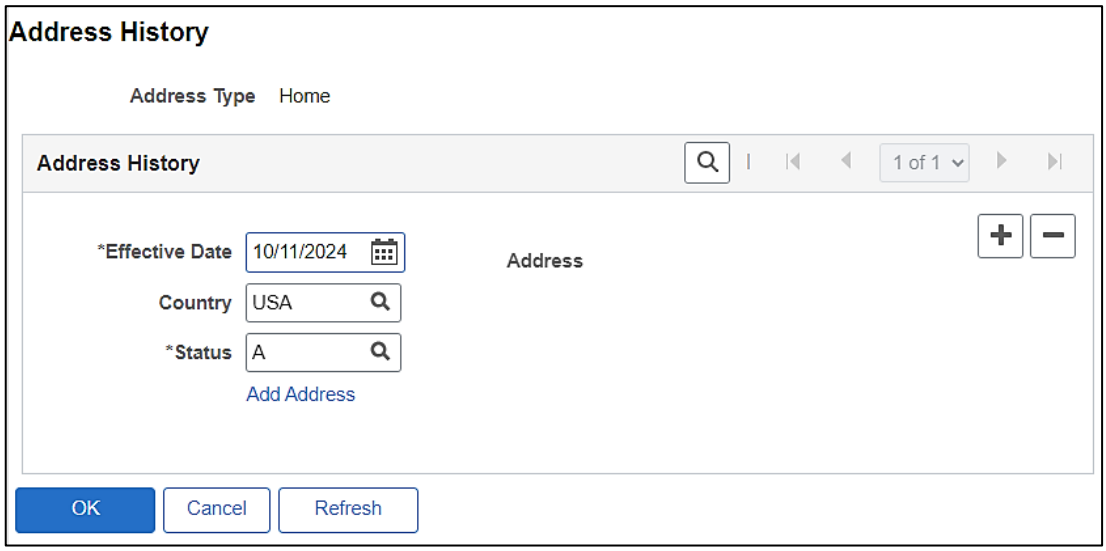
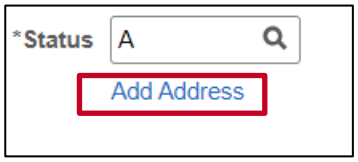


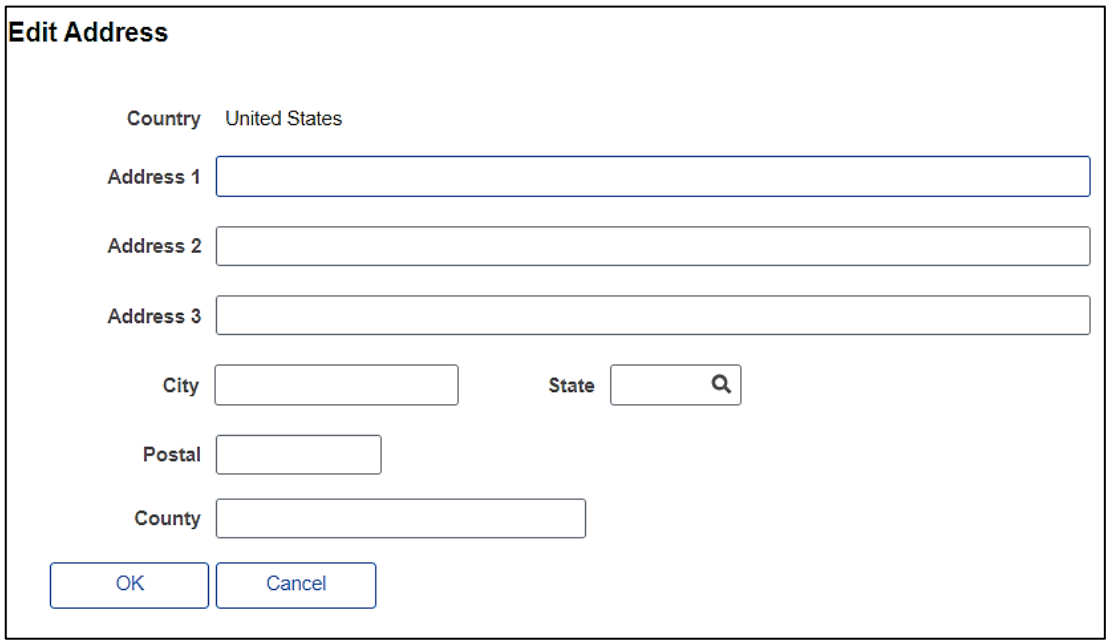
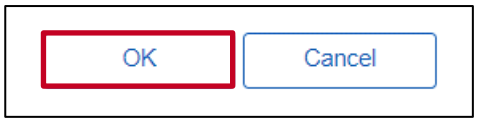
Step	Action
11.	The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire as needed. 
	The **Effective Date** cannot be greater than today's date when adding/modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
12.	Click the **Add Name** button.
The **Name** page displays in a pop-up window. 	
13.	Optionally, click the **Name Prefix** dropdown button and select the applicable prefix.
14.	Enter the employee's first name in the **First Name** field (required).

Step	Action
15.	Optionally, enter the employee's middle name in the **Middle Name** field.
	Do not add a period behind the middle initial.
16.	Enter the employee's last name in the **Last Name** field (required).
	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.
18.	Click the **OK** button. 
The **Modify a Person** page returns. Scroll down to the **Biographic Information** section. 	
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.

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).
21.	Scroll down to the **Biographical History** section.
The **Biographical History** section displays. 	
	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.
	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.

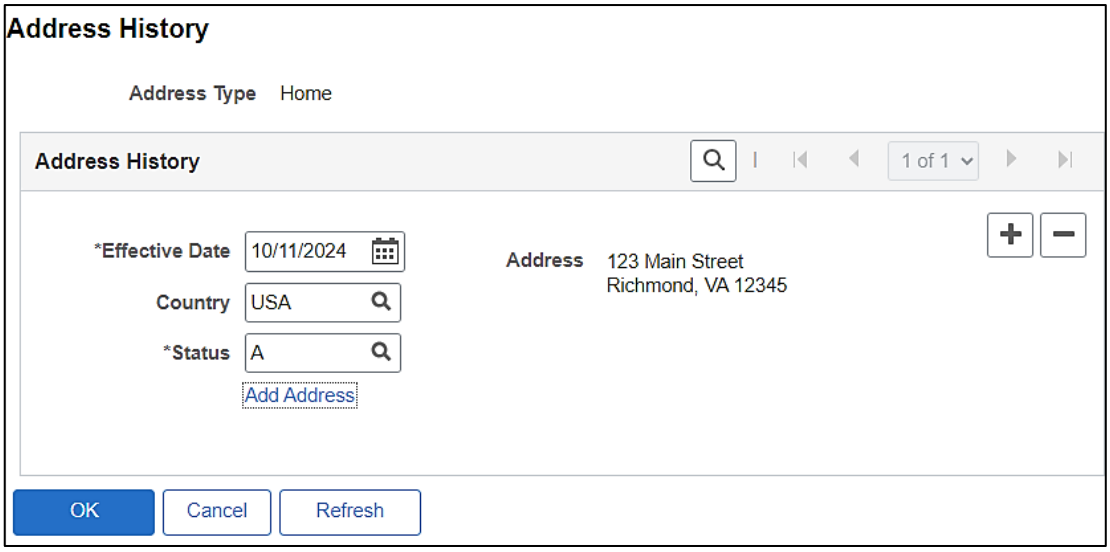
Step	Action
24.	Click the **Marital Status** dropdown button and select the employee's legal marital status.
	The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
25.	Scroll down to the **National ID** section.
The **National ID** section displays. 	
26.	Enter the employee's Social Security Number (SSN) in the **National ID** field. 
27.	Scroll back up to the top of the page and click the **Contact Information** tab. 

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

Step	Action
	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. 	
30.	Enter the employee’s address information using the applicable fields.
	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. 

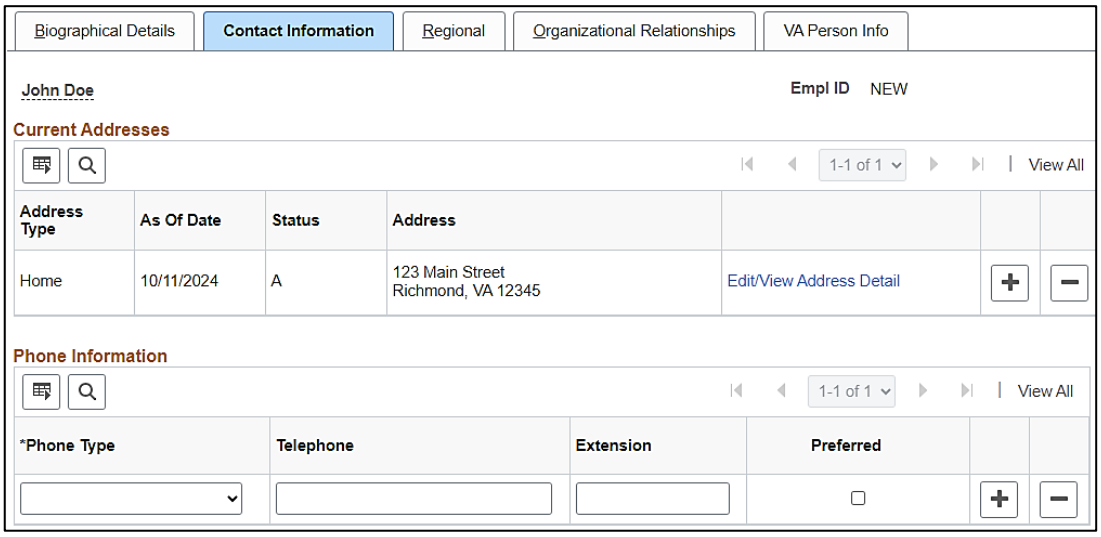
Step	Action

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



32.	Click the **OK** button.

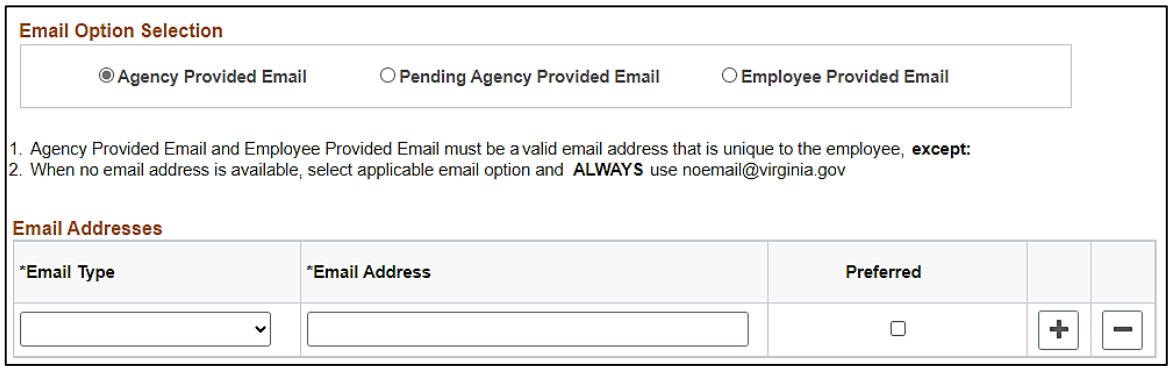
The **Contact Information** tab redisplays.



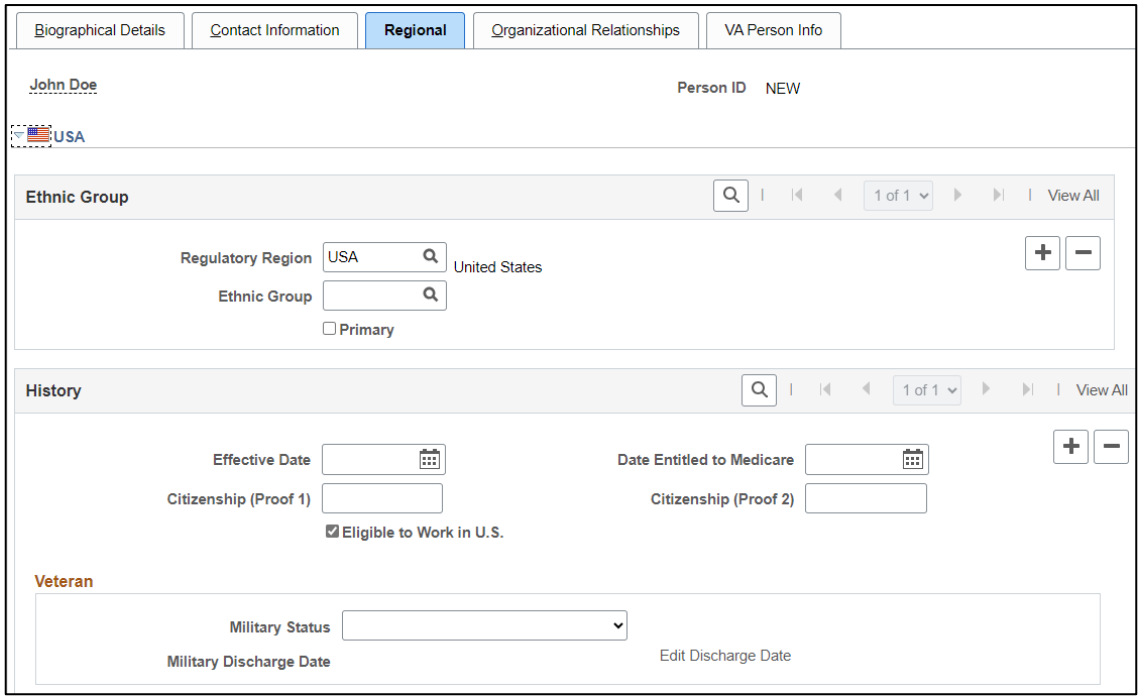
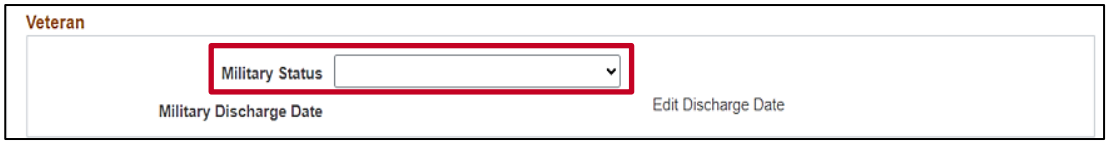
33.	Click the **Phone Type** dropdown button and select the type of phone.

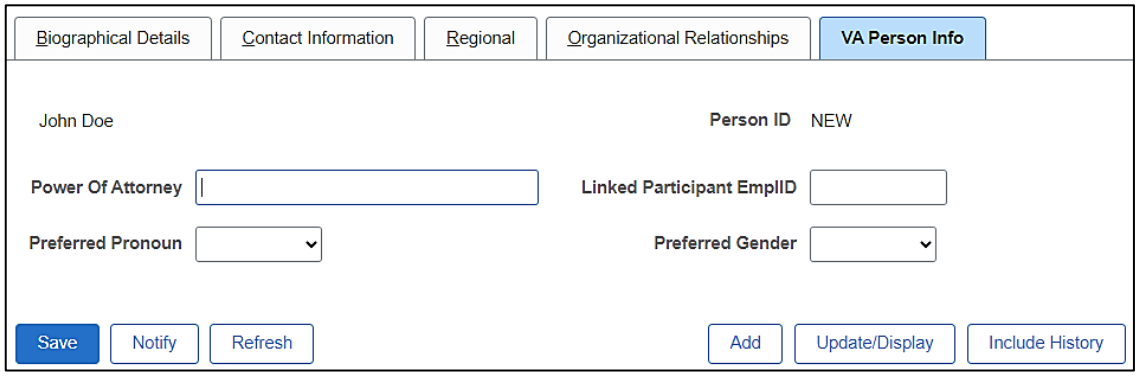
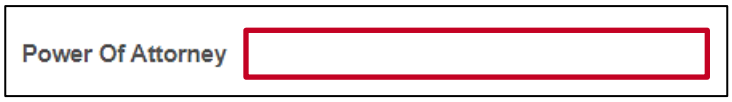
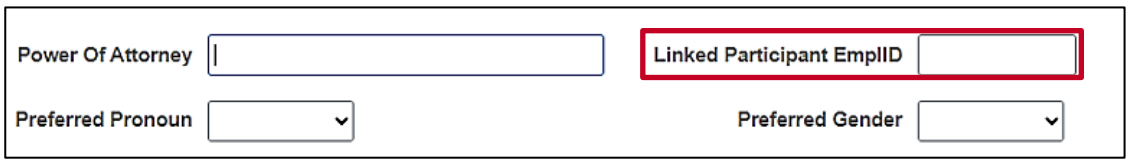
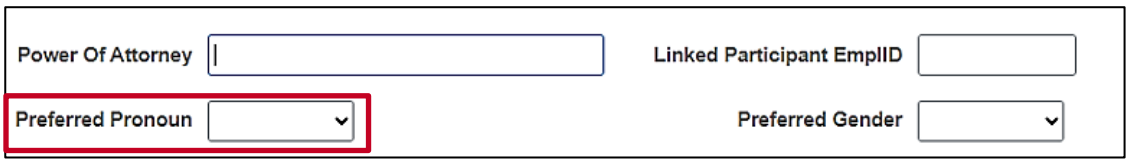
Step	Action
34.	Enter the applicable telephone number in the **Telephone** field.
	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.
35.	Click the **Preferred** checkbox option to identify the employee's preferred phone number.
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.

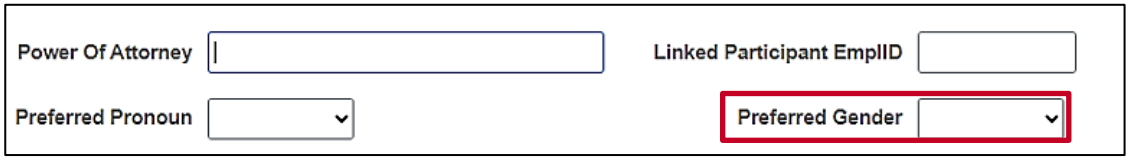
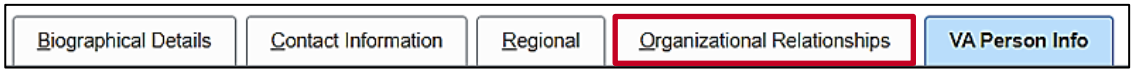
The **Email Option Selection** and **Email Addresses** sections display.



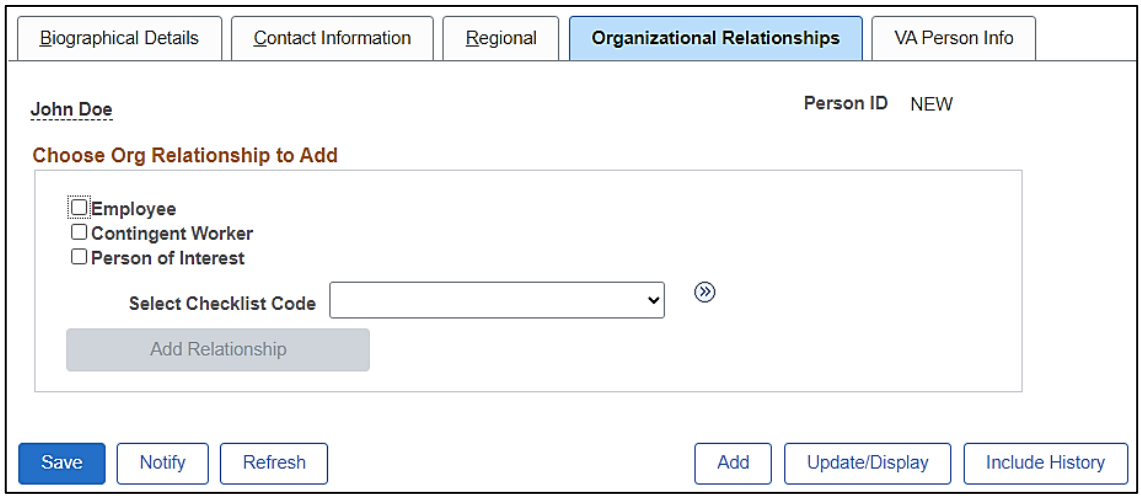
Step	Action
38.	Complete these sections based on the following guidelines: a. If the employee has been issued a business email: i. Accept the default email option of **Agency Provided Email** ii. Click the **Email Type** dropdown button and select “Business” iii. Enter the email address in the **Email 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.

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. 

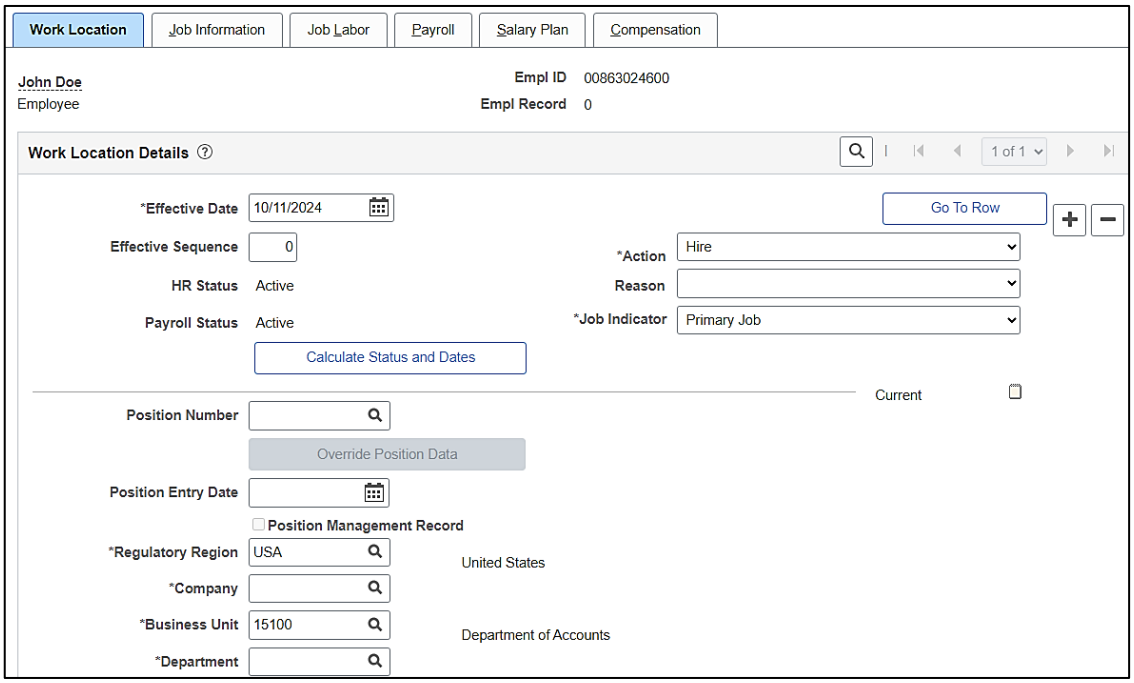
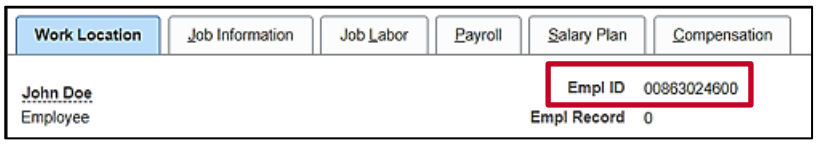
Step	Action
43.	The remaining sections on this tab are not currently being utilized in Cardinal. Click the **VA Person Info** tab. The **Organizational Relationships** tab will be addressed after reviewing/completing the **VA Person Info** tab.
The **VA Person Info** tab displays. 	
44.	Enter the name of the person who has legal Power of Attorney for the employee in the **Power of Attorney** field. 
	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. 
46.	Click the **Preferred Pronoun** dropdown button and select the preferred pronoun provided by the employee. 

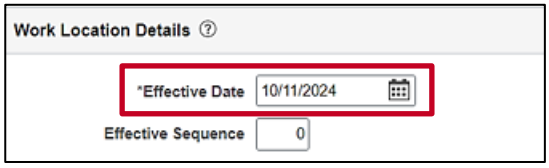
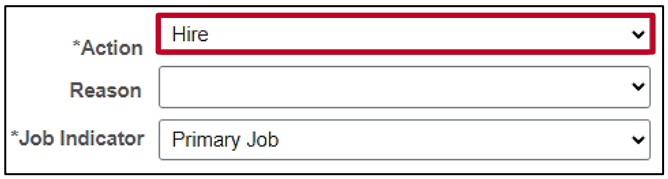
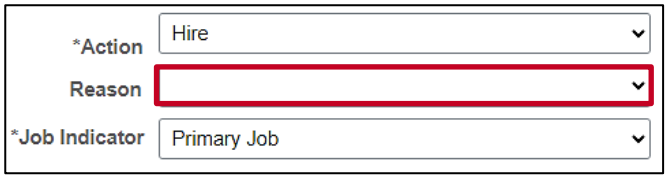
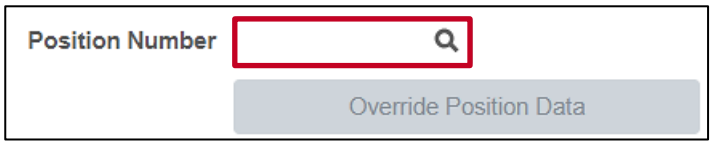
Step	Action
47.	Click the **Preferred Gender** dropdown button and select the preferred gender provided by the employee. 
48.	Click the **Organizational Relationships** tab. 

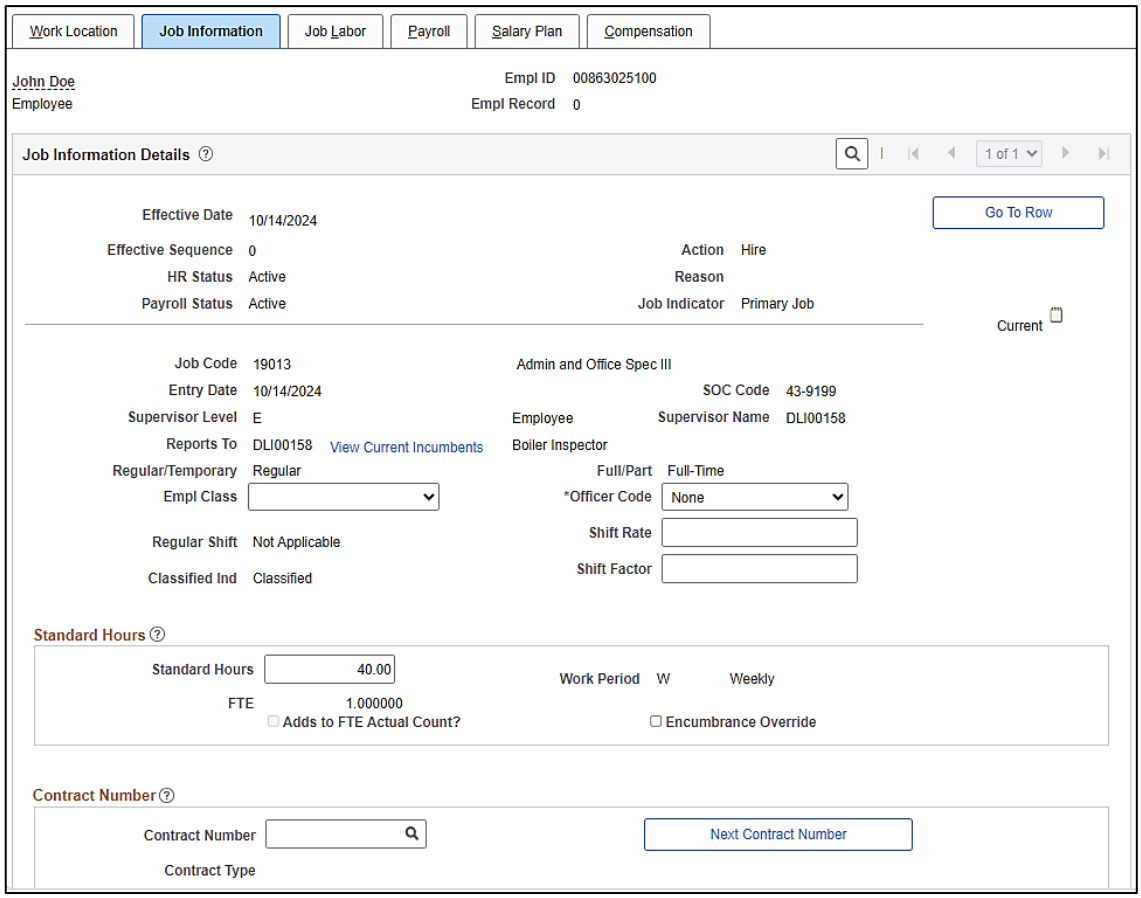
The **Organizational Relationships** tab displays.



49.	Click the **Employee** checkbox option. The **Hire** checklist appears in the **Select Checklist Code** field after selecting the **Employee** checkbox option.
50.	Click the **Add Relationship** button.

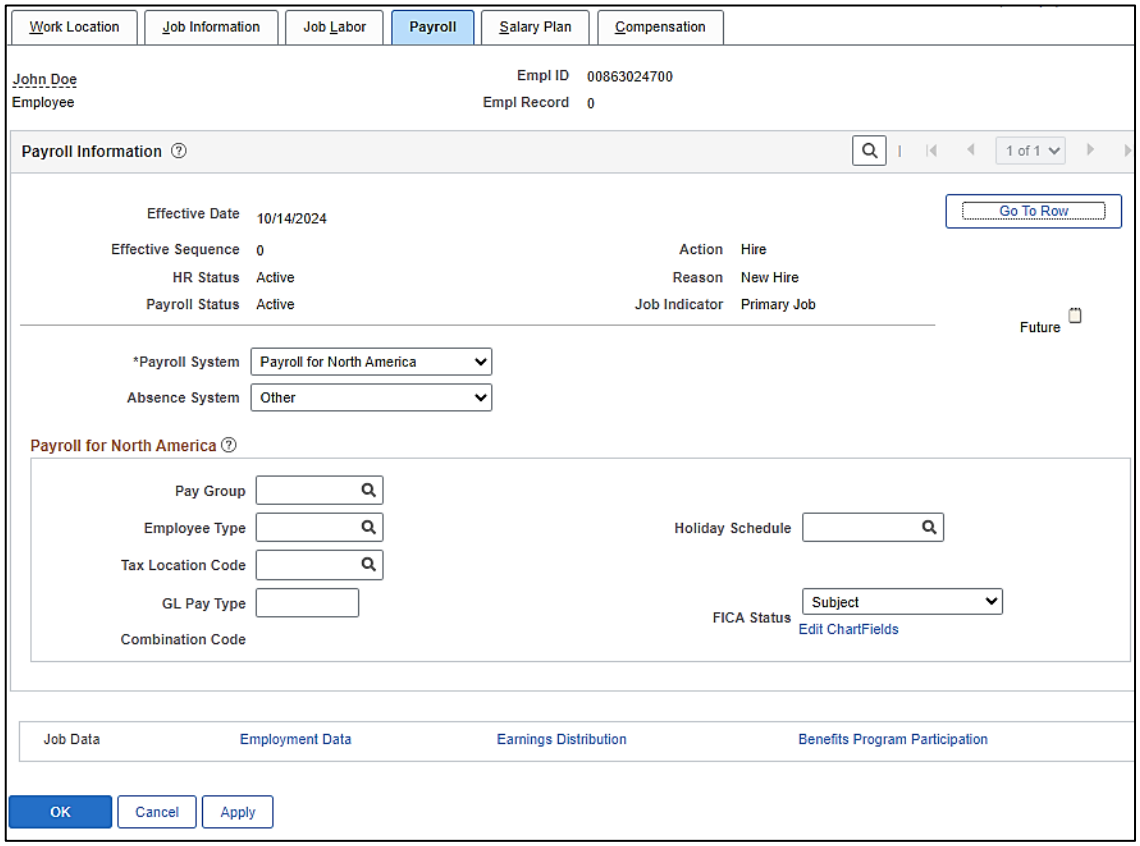
Step	Action
	This is the step where information entered for the employee's personal data is validated. If there is any missing required information, Cardinal will generate an alert at this point. Do not click the **Back** button in the browser to go back, as all information that has been entered will 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.	
	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. 

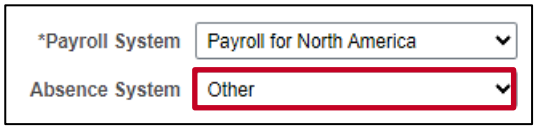
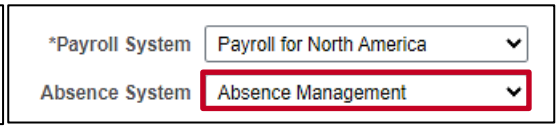
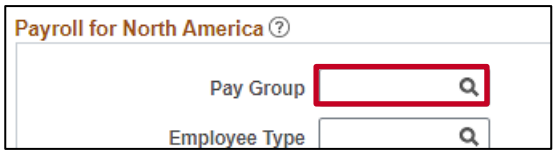
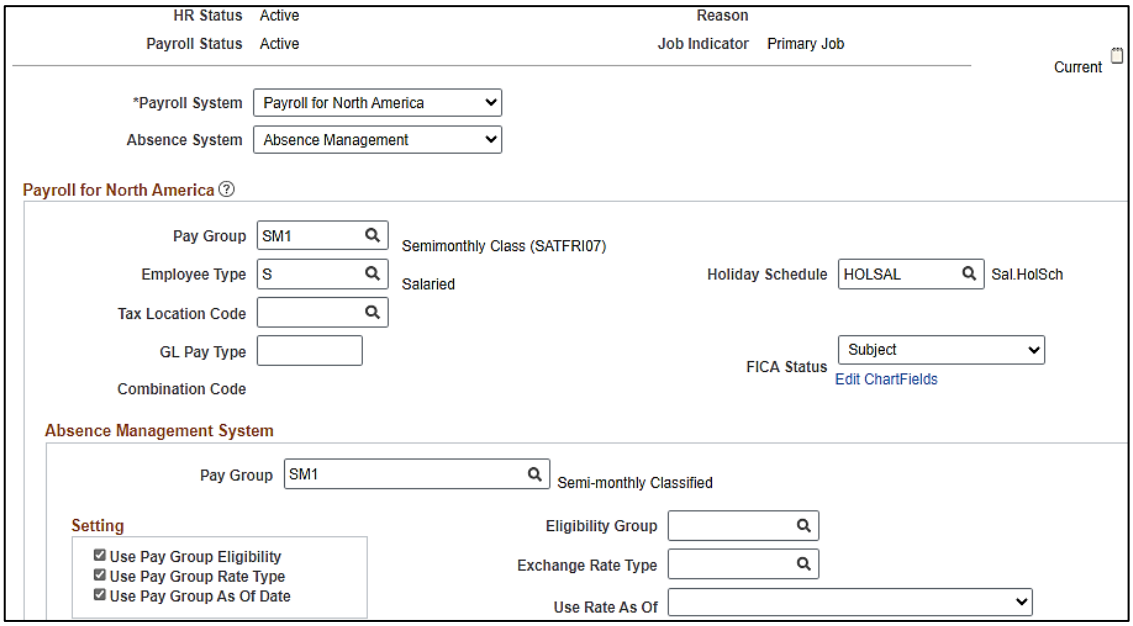
Step	Action
51.	The **Effective Date** field defaults to the date entered on the **Personal Information** page. If this date is not the first date of employment for the employee, it can be updated now. 
	A help desk ticket is required to adjust the new employee's effective date after their Job Record is saved.
52.	The **Action** field defaults to "Hire" and no other selections are available. 
53.	Click the **Reason** dropdown button and select "New Hire". 
	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. 
	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.

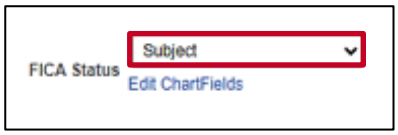
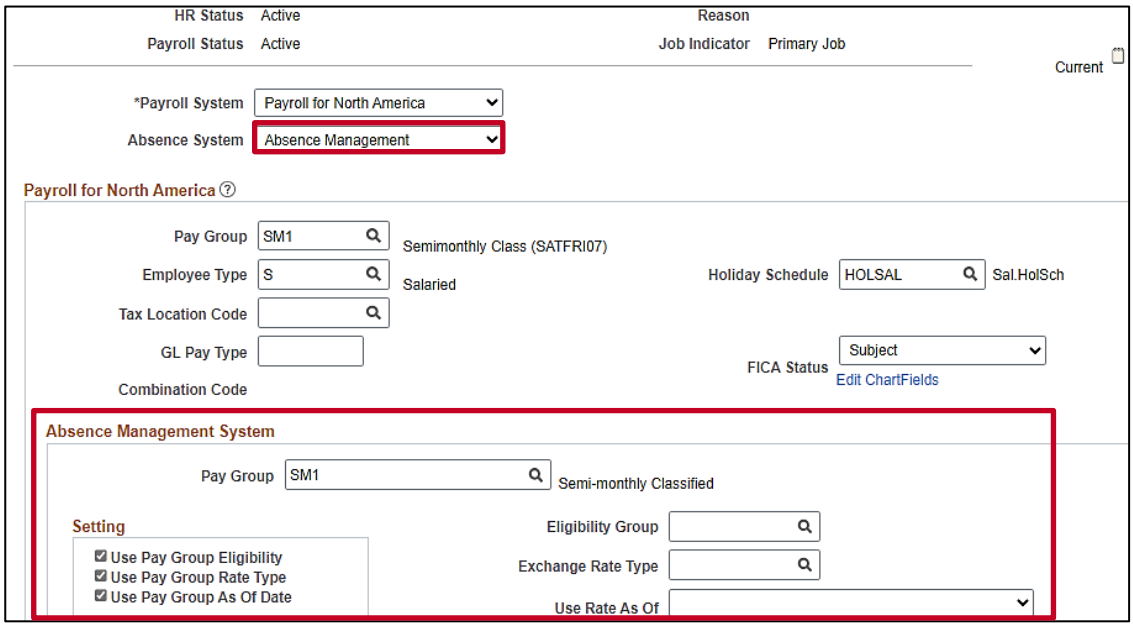
Step	Action
55.	Click the **Job Information** tab.
The **Job Information** tab displays. 	
56.	Review the information within the **Job Information Details** section. These values are populated when the Position Number is selected on the **Work Location** tab.
57.	Click the **Empl Class** dropdown button 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**.

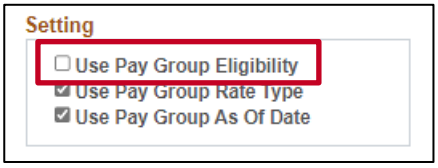
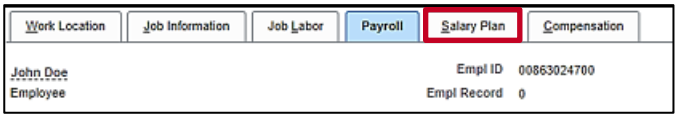
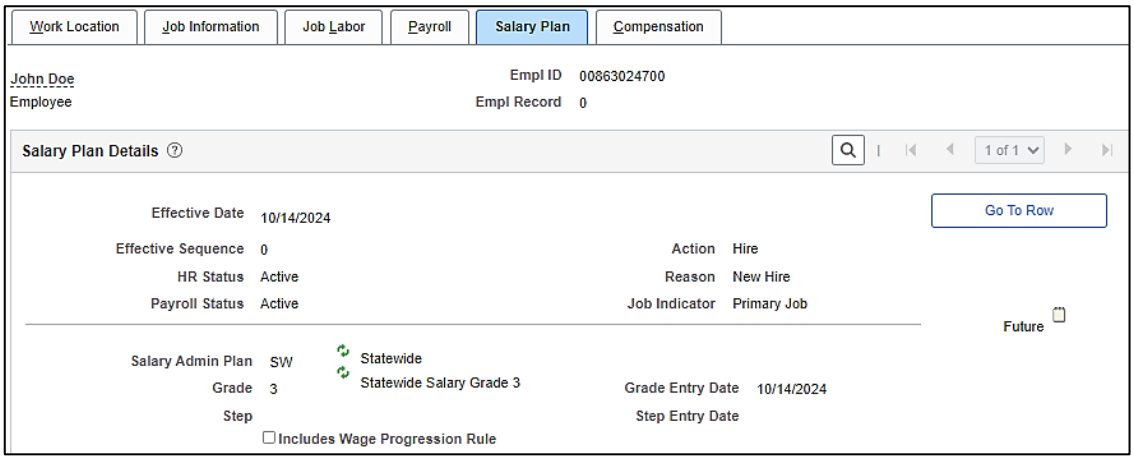
Step	Action
	The **Action/Reason**, **Employee Class**, and **Job Code** fields are key fields in the VRS file nightly extract from Cardinal to VRS. VNAV reconciliation will be difficult and time consuming if the incorrect data is entered.
58.	The **Standard Hours** field defaults to "40". If the position 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.
	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.

The **Payroll** tab displays.

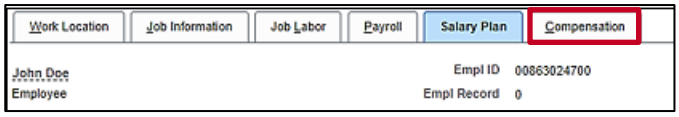


Step	Action
	The **Payroll System** field defaults to “Payroll for North America”. Do not change.
60.	The **Absence System** field defaults to “Other”. If the Agency uses Cardinal Absence Management and the employee is salaried, click the **Absence System** dropdown button and select “Absence Management”. 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”.  
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. 	

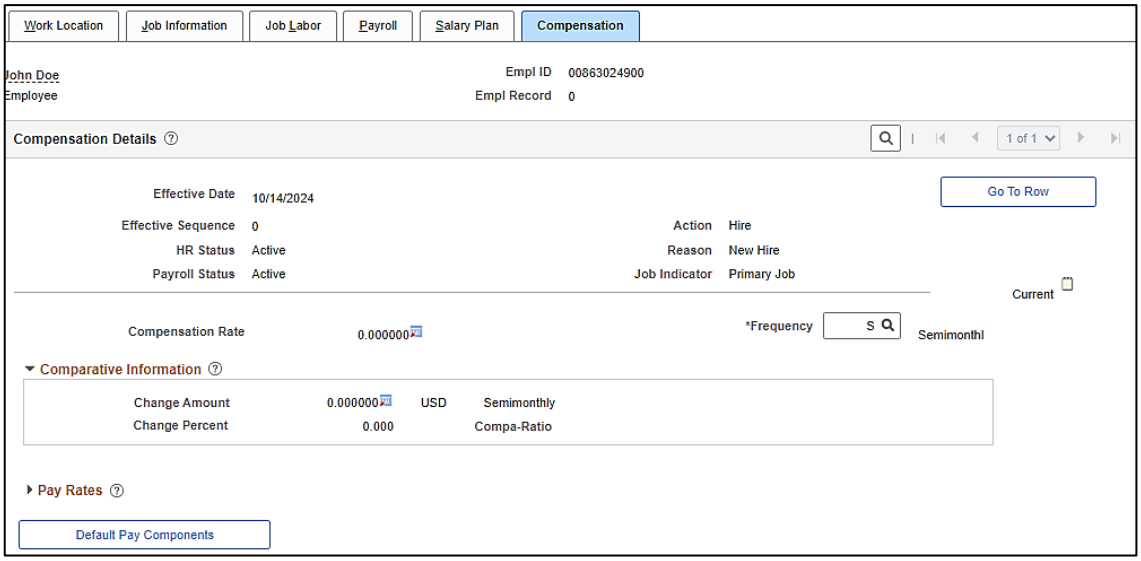
Step	Action
62.	The **FICA Status** field defaults to "Subject" for regular Social Security and Medicare tax withholdings. Update as needed based upon the following guidance: • "Exempt" if the employee is exempt from both Social Security and Medicare tax withholdings • "Medicare only" if the employee is only subject to Medicare tax withholdings 
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. 
64.	Click the **Tax Location Code Look Up** icon and select the applicable code based on the location of the employee's office.

Step	Action
65.	The **Use Pay Group Eligibility** checkbox option is selected by default. De-select this checkbox option. 
66.	Click the **Eligibility Group Look Up** icon and select the applicable Eligibility Group for the employee.
	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. 
The **Salary Plan** tab displays. 	
68.	Review the Salary Plan information. This information comes from the position.
	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.



The **Compensation** tab displays.

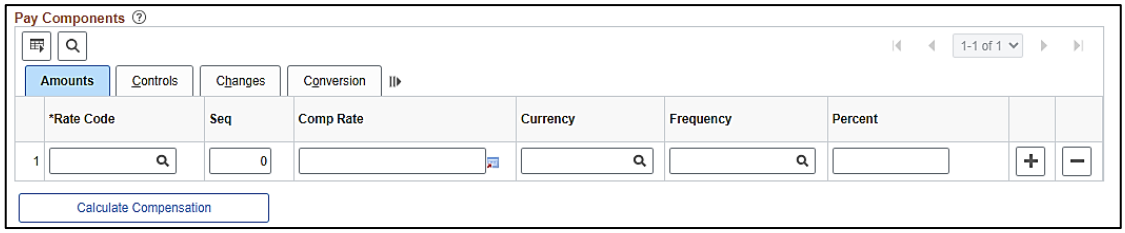


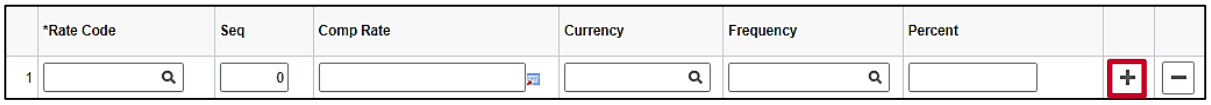
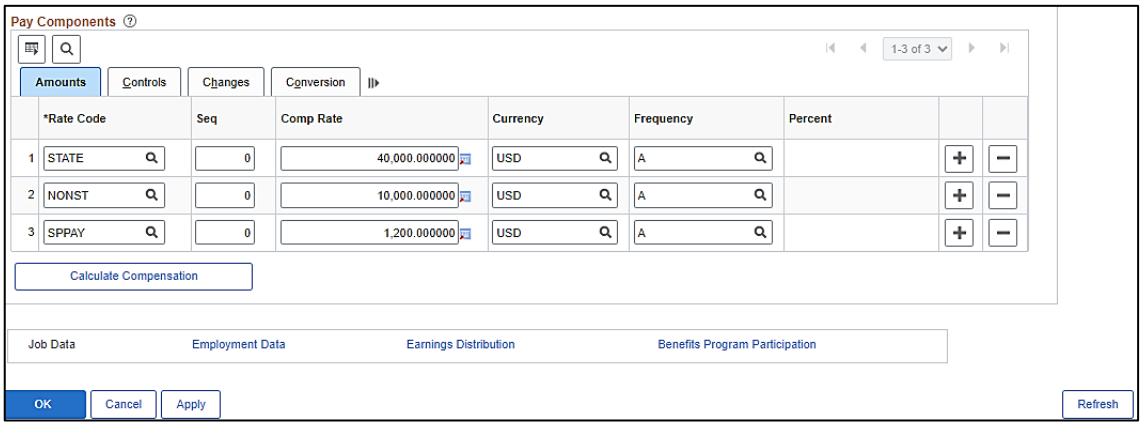
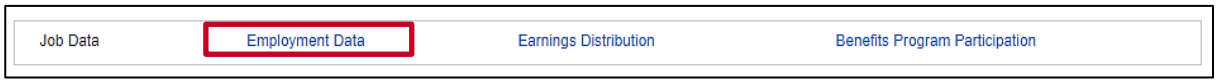
70.	If not already populated, enter or select the employee's pay frequency in the **Frequency** field (e.g., "S" for Semimonthly; "H" for Hourly).

71.	Click the **Default Pay Components** button.

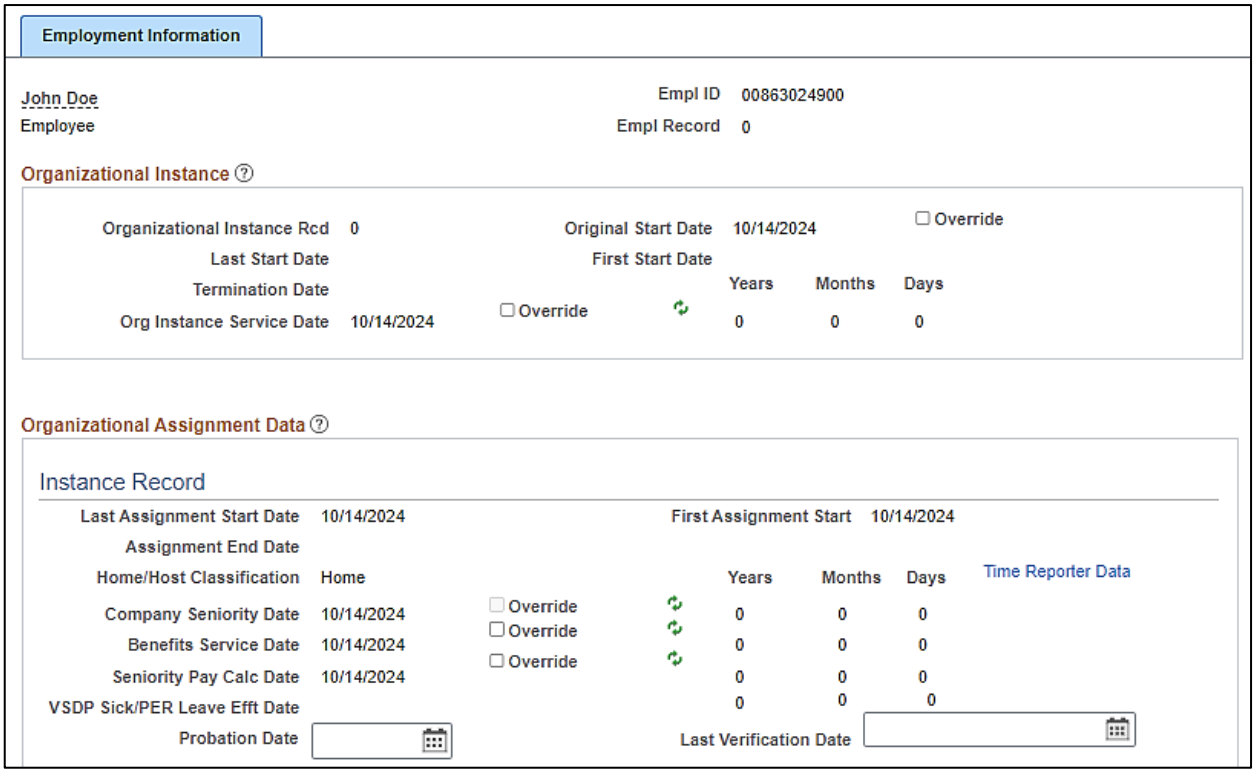
72.	Scroll down to the **Pay Components** section as needed.

The **Pay Components** section displays.

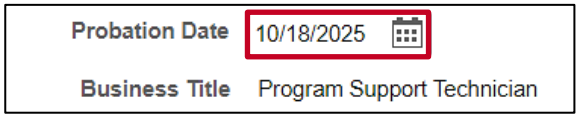


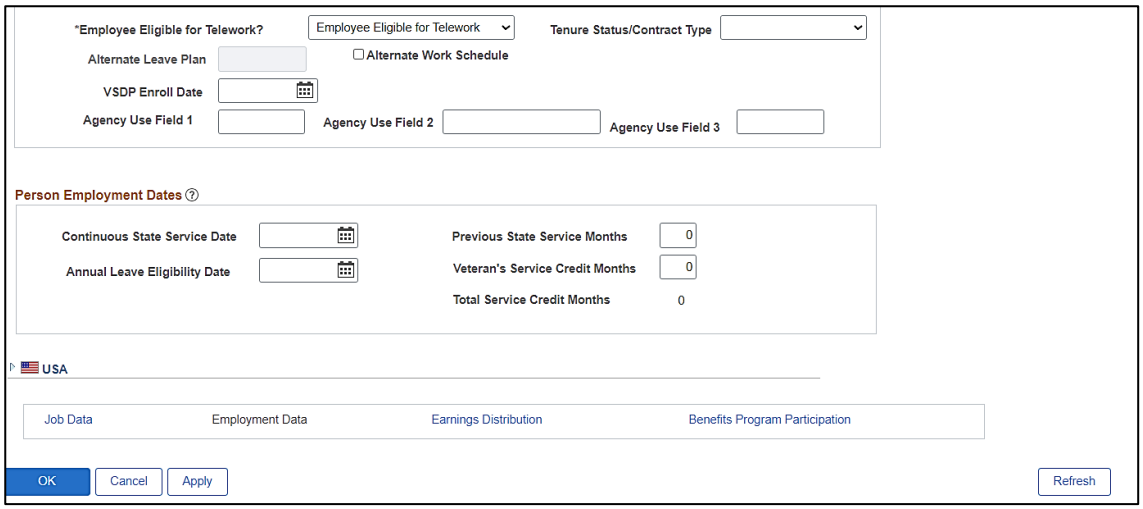
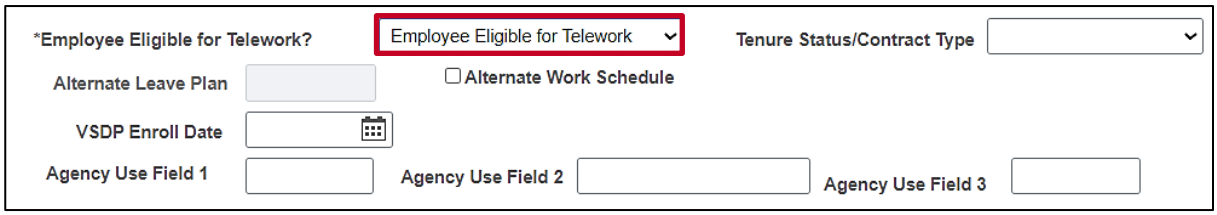
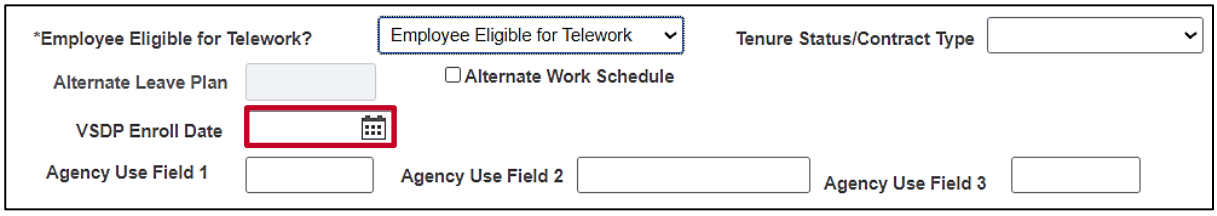
Step	Action
73.	Click the **Rate Code Look Up** icon and select the applicable Rate Code.
74.	Enter the compensation to pay the employee (Annual Salary or Hourly Rate) in the **Comp Rate** field.
75.	The **Currency** and **Frequency** fields default based on the Rate Code selected.
	If multiple Rate Codes need to be entered, click the **Add a New Row** icon (**+**) and repeat steps 73 - 75. 
76.	Click the **Calculate Compensation** button.
The **Compensation** tab refreshes. 	
77.	Click the **Employment Data** link at the bottom of the page. 

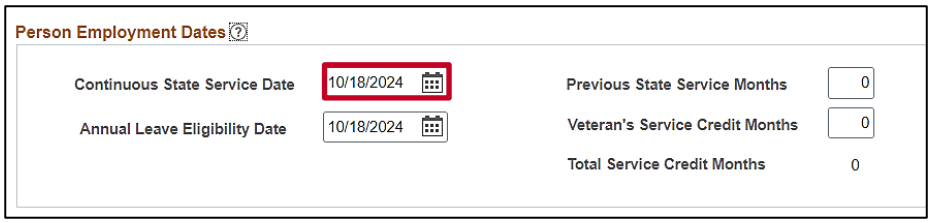
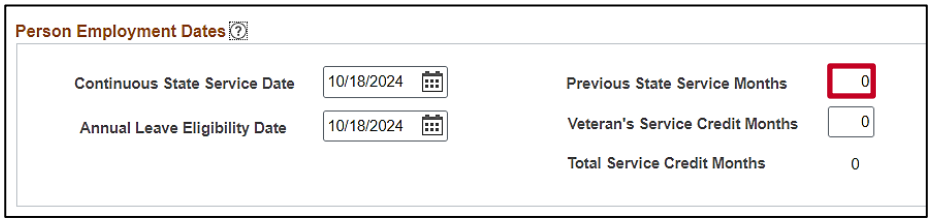
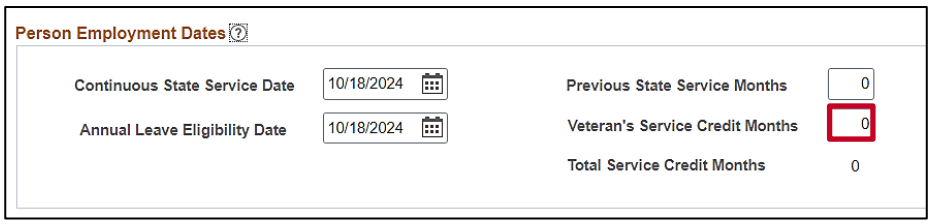
Step	Action
	The **Employment Information** page displays.

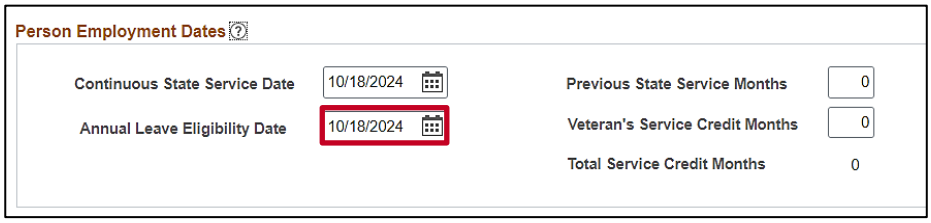


78.	If the employee is a Classified new hire employee, click the **Probation Date Calendar** icon and select the date one year from the hire/rehire date, if applicable.
79.	Scroll down on the page.



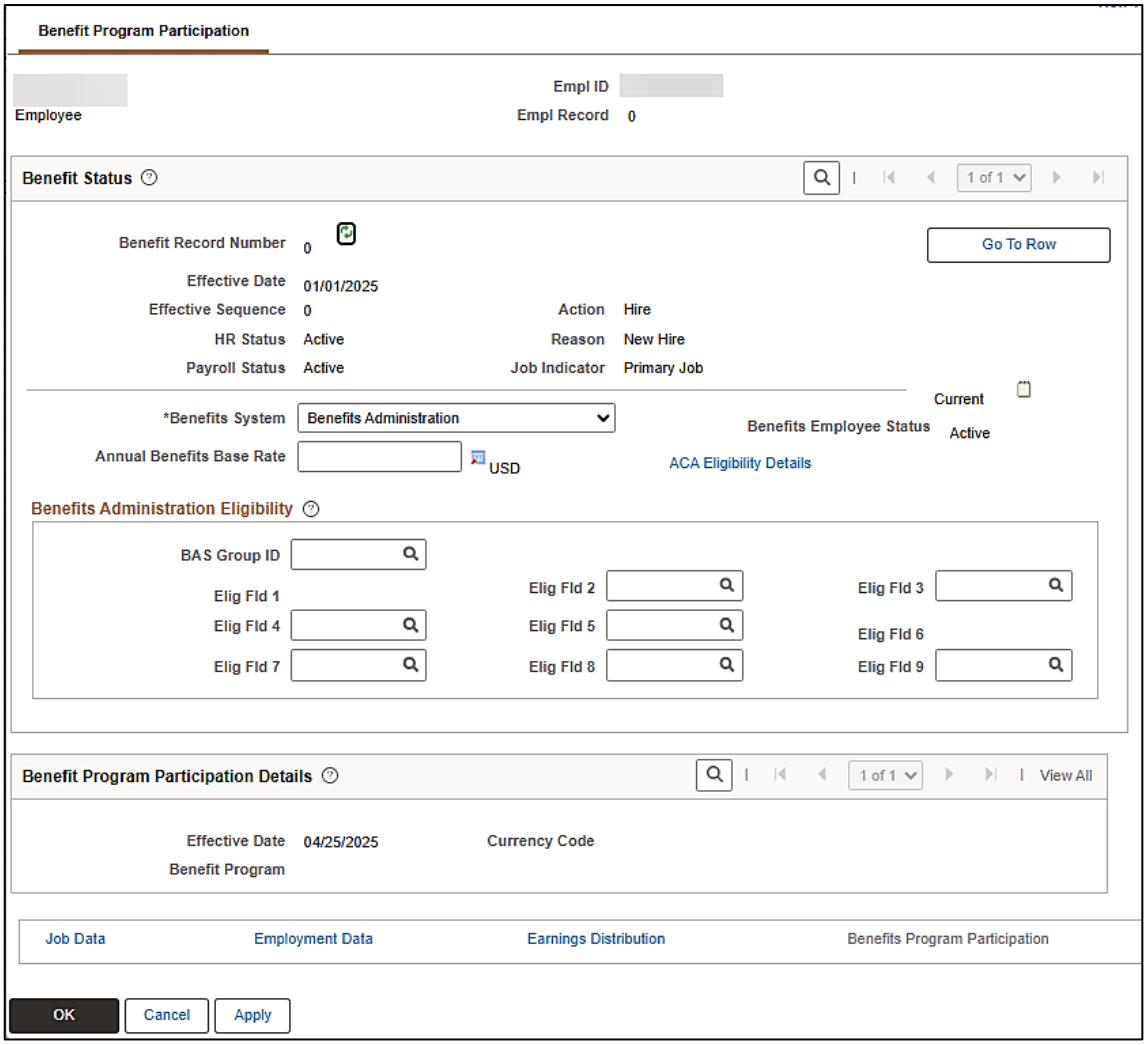
Step	Action
	Before recording the employee's telework status, the Agency HR administrator should verify if the employee will be teleworking. For further information on selecting the appropriate telework option, see the Job Aid titled **HR351 Managing Employee Teleworker Data**. This Job Aid can be found 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. 
	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. 

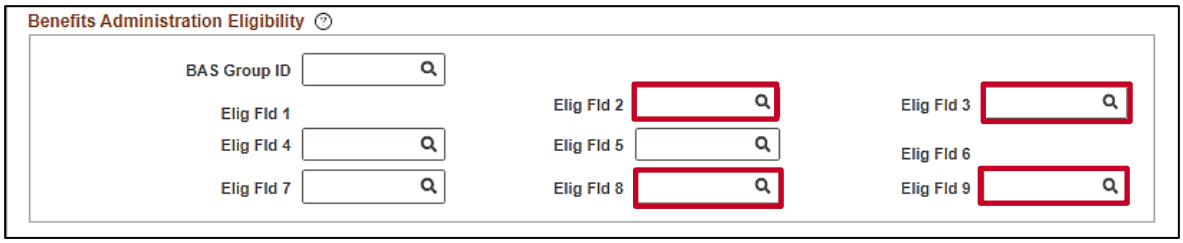
Step	Action
82.	Enter the **Continuous State Service Date** and select the employee's hire/rehire date. This field is used to determine the employee's eligibility for legislative pay increases for all salaried employees, as well as severance, and benefits at layoff for VPA covered employees (if applicable). 
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. 
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. 
	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) 
	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.

Step	Action

The **Benefits Program Participation** page displays.



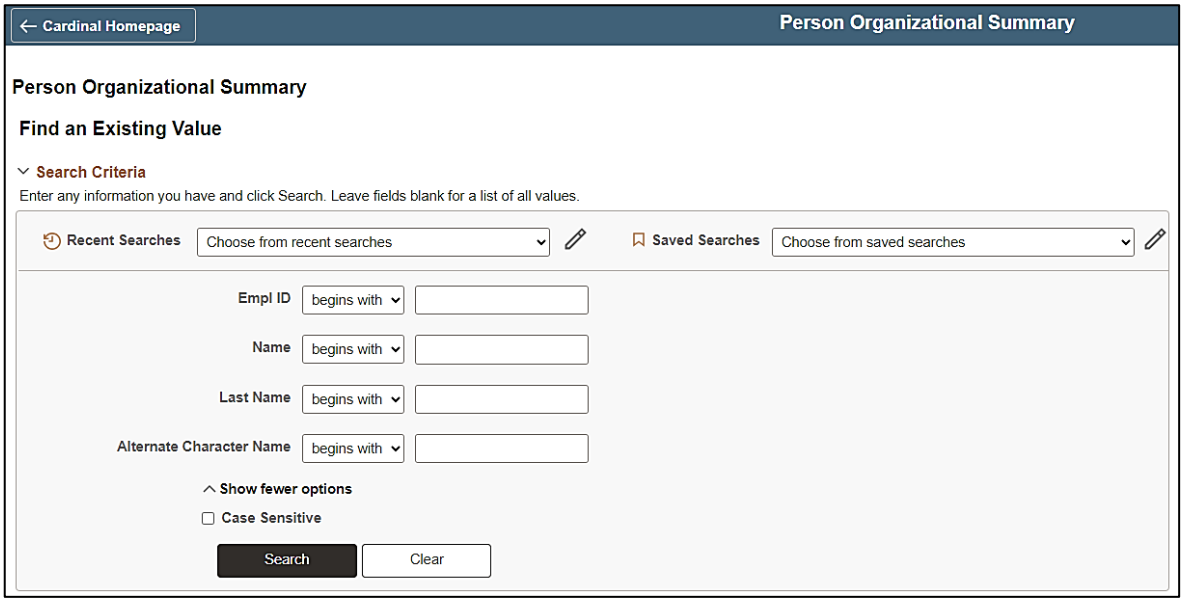
Step	Action
87.	Complete the **Elig Fld 2**, **Elig Fld 3**, **Elig Fld 8**, and **Elig Fld 9** fields based on the following: • **Elig Fld 2** - select the applicable Healthcare Group ID (Department value). These values are provided to the health benefit vendors and reflect the group in which the employee 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) 
	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.
	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.

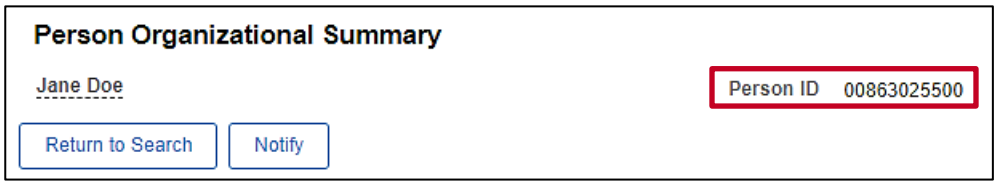
Hiring a Person When Personal Data (Employee ID) Exists in Cardinal

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**

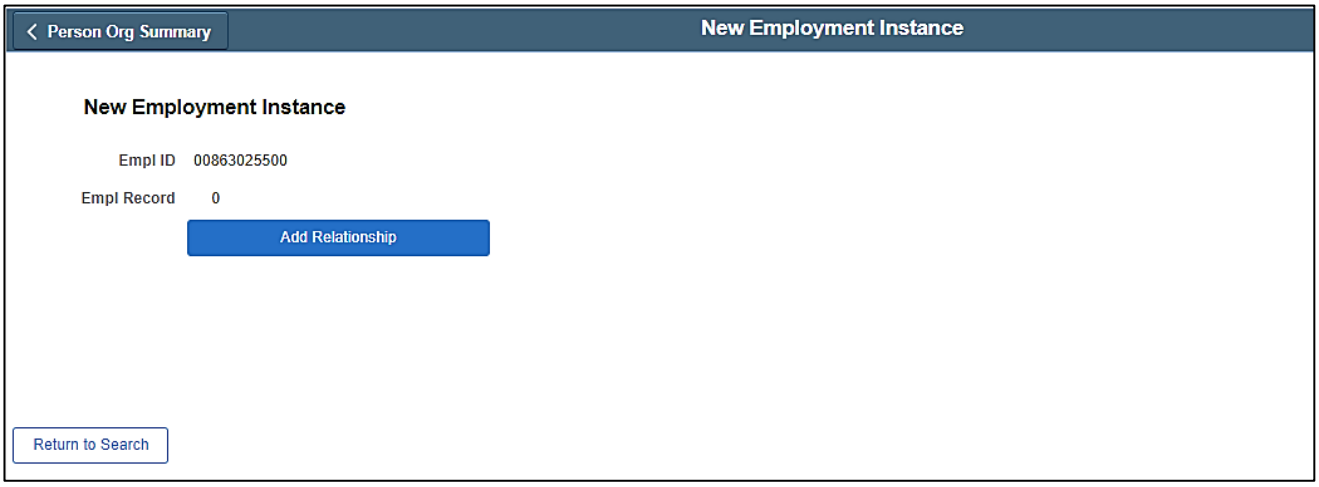
The **Person Organizational Summary Find an Existing Value** page displays.



2.	Enter any search criteria and then click the **Search** button.
3.	Copy the Employee ID from the **Person ID** field. 

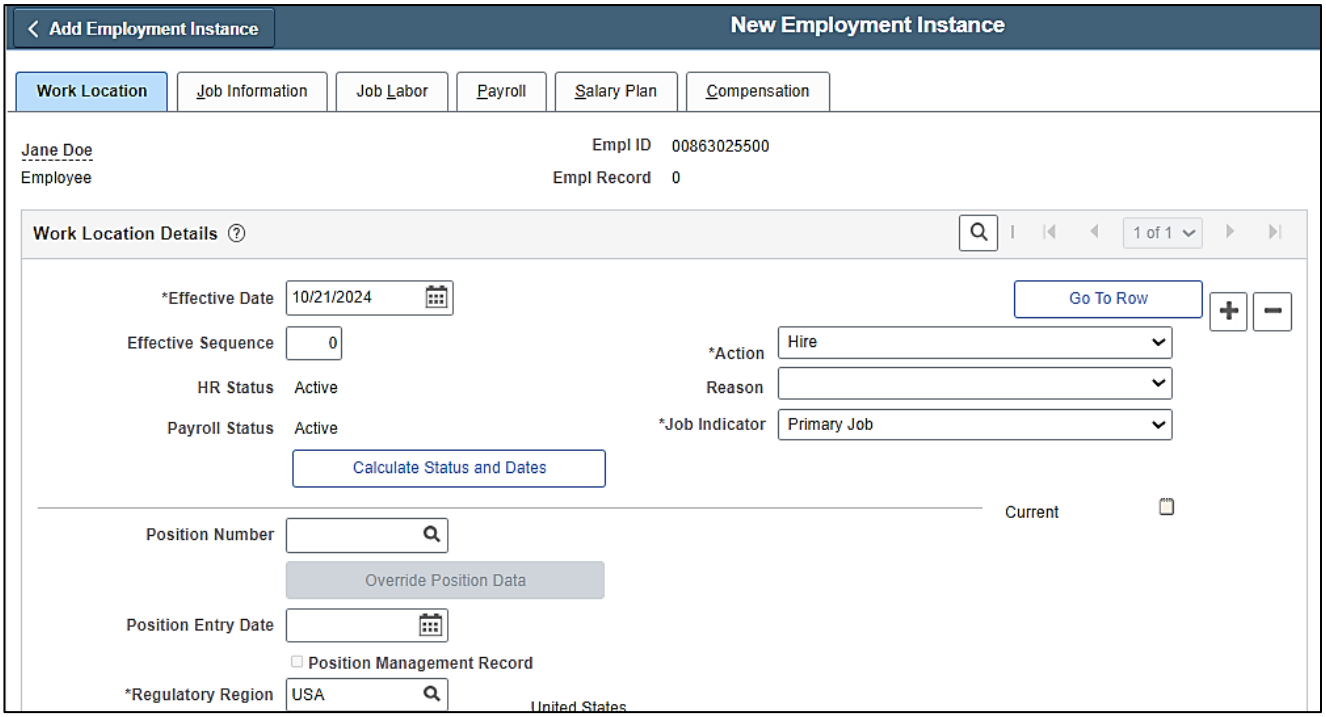
Step	Action
4.	Navigate to the **Add Employment Instance** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance**

The **New Employment Instance** page displays.

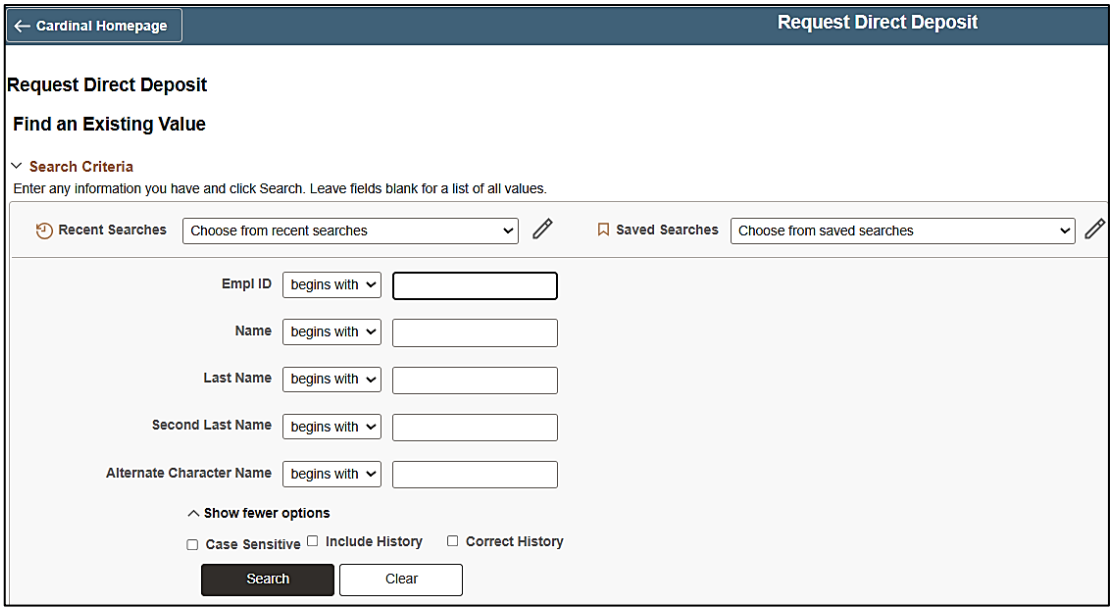
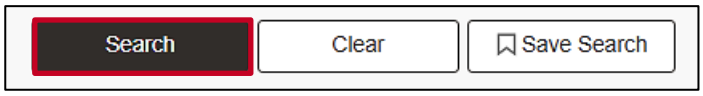


	Validate that the correct Employee ID and Employee Record Number are displayed. For a brand-new hire, the employee record should be Employee Record Number “0”.
5.	Click the **Add Relationship** button.

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

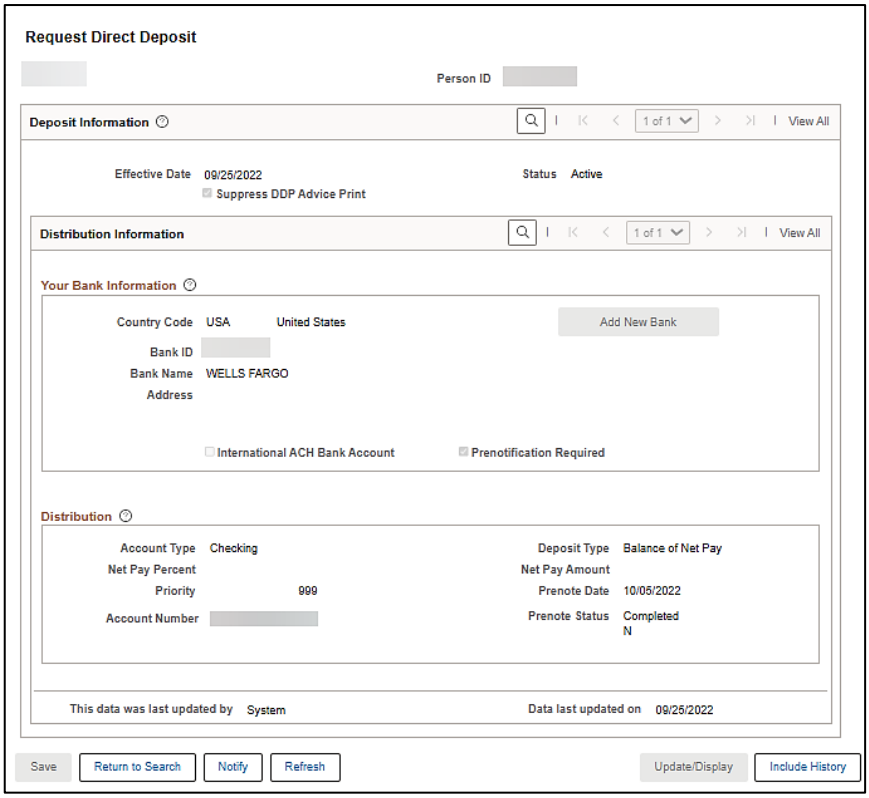


6.	Complete the hire as detailed in the Completing a New Hire section of this Job Aid beginning with Step 52.
	If the employee being hired has no employee record with the Agency (requiring the use of “Hire” Action, “New Hire” Reason), but has other employment records in Cardinal, review the Direct Deposit 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**

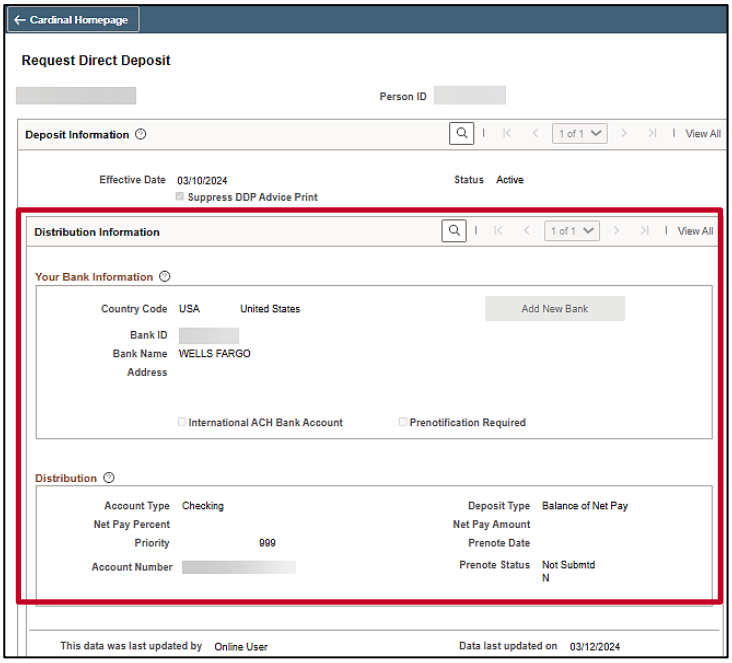
Step	Action
	The **Request Direct Deposit Search** page displays. 
	The **Request Direct Deposit** page is a Read Only page available under the HR Administrator role. For more information pertaining to viewing the **Direct Deposit** page, see the **Viewing the Direct Deposit Page** section of the Job 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.
9.	Click the **Search** button. 

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.

- 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:

- 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.
- 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).

- 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.).

- 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**