Viewing and Modifying Personal Data Overview

This Job Aid walks the HR Administrator through the process to view and modify an employee's personal data in Cardinal. Many of these transactions can also be performed by the employee using Employee Self-Service (ESS). A name change entered by the employee via ESS is simply a request until the employee provides the appropriate documentation to the HR Administrator to approve it.

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 for each employee. Agencies may update existing personal data which will impact changes across other Business Units (Agencies). Scenarios that create issues for the employee include updates to the email address made by one Agency, which affect 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 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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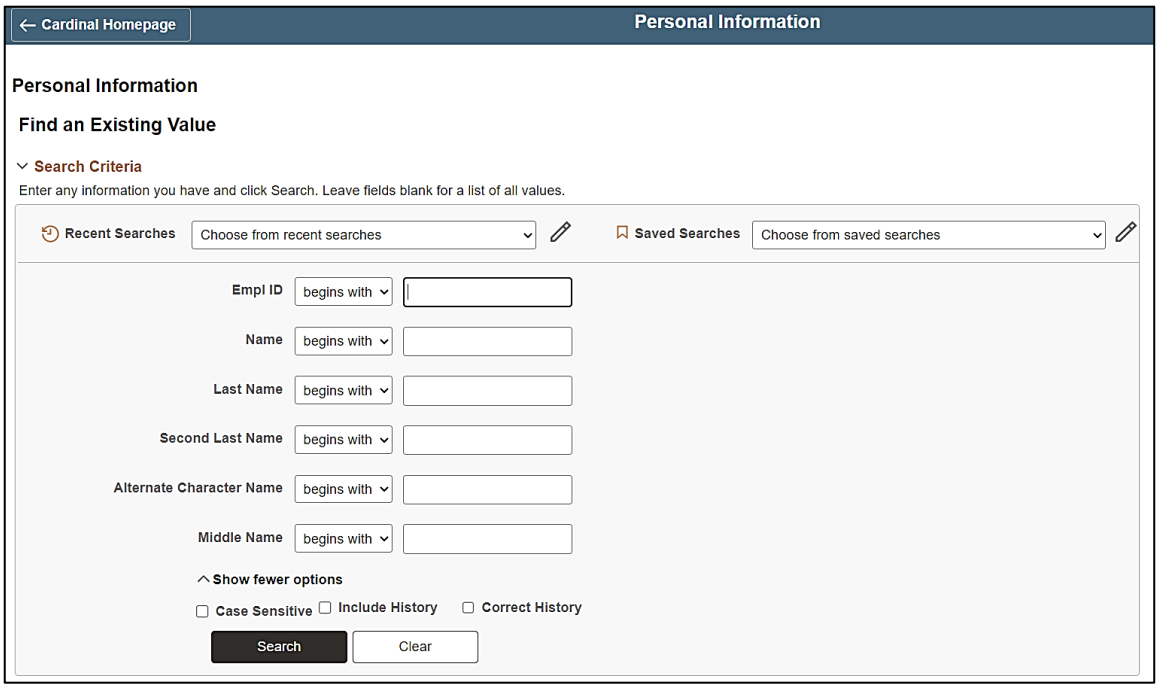
Revision History

Revision Date	Summary of Changes
1/12/2026	Note added referencing the Job Aid **BN361 Linking Dependents and Retirees** in Section 6, after Step 3.
11/14/2025	Note added regarding business email address for employees with multiple jobs in the Updating Contact Information – Address, Phone, or Email Address section of the Job Aid.
10/1/2025	Added steps and clarifying language for updating the mailing address information in the Updating Contact Information – Address, Phone, or Email Address section of the Job Aid.
3/1/2025	Updated the screenshots of the Search pages (Section 1; after Step 1; Section 7, after Step 1; Section 9, after Step 1; Section 10, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Navigating to the Modify a Person Page

Step	Action
1.	Navigate to the **Modify a Person** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Modify a Person**

The **Personal Information Find an Existing Value Search** page displays.

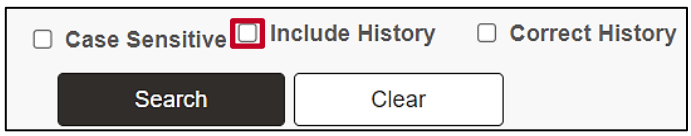


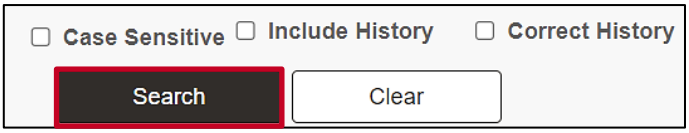
For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

2. Enter the employee's Employee ID in the **Empl ID** field.

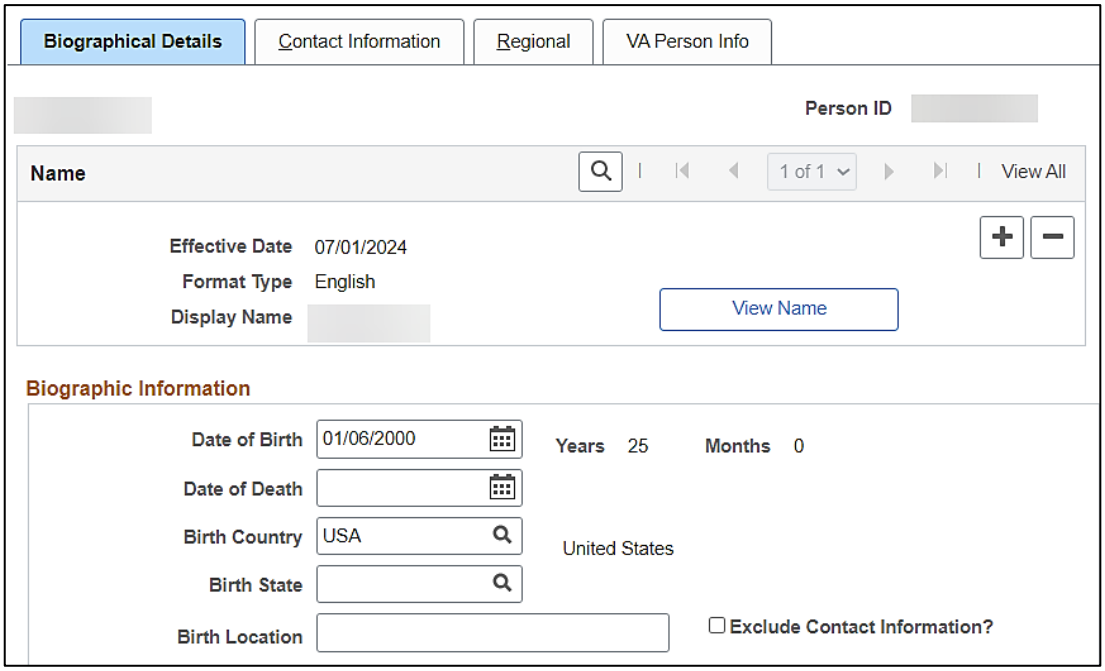
Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

3. Click the **Include History** checkbox option.



Step	Action
4.	Click the **Search** button. 

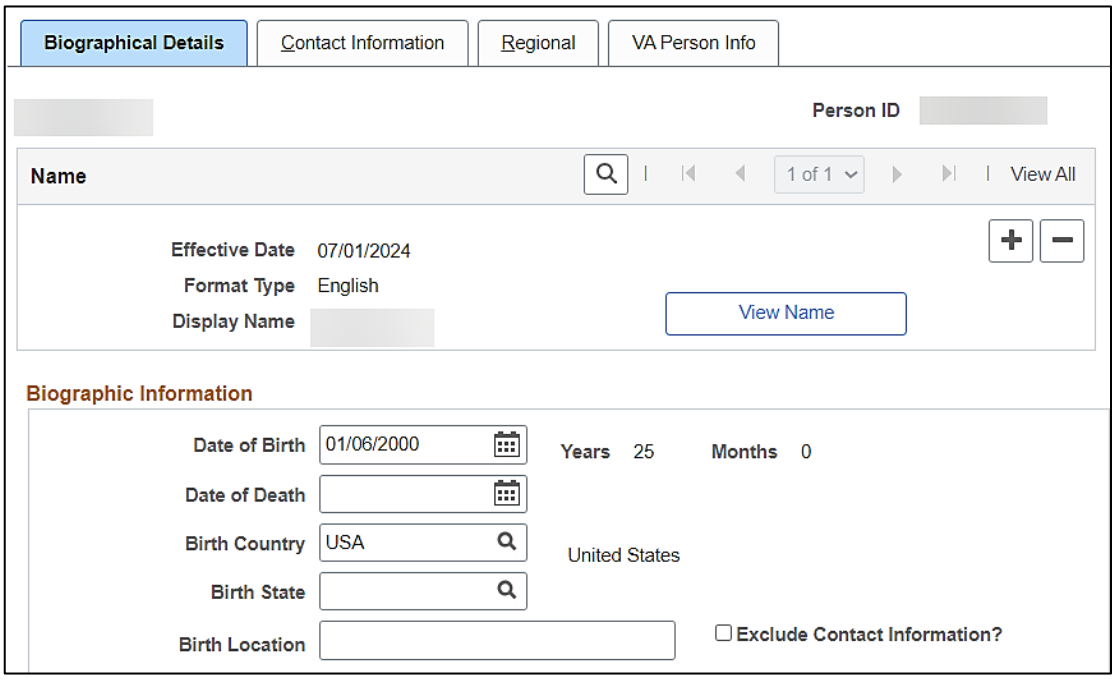
The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.



Updating Name

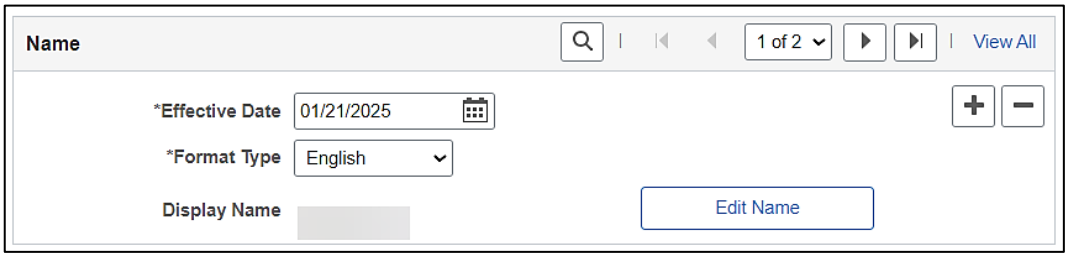
To update an employee's name, users must first navigate to the **Modify a Person** page by following the instructions in the Navigating to the Modify a Person Page section of this Job Aid.

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

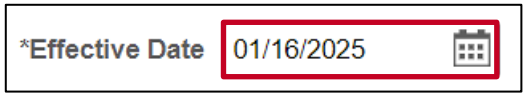
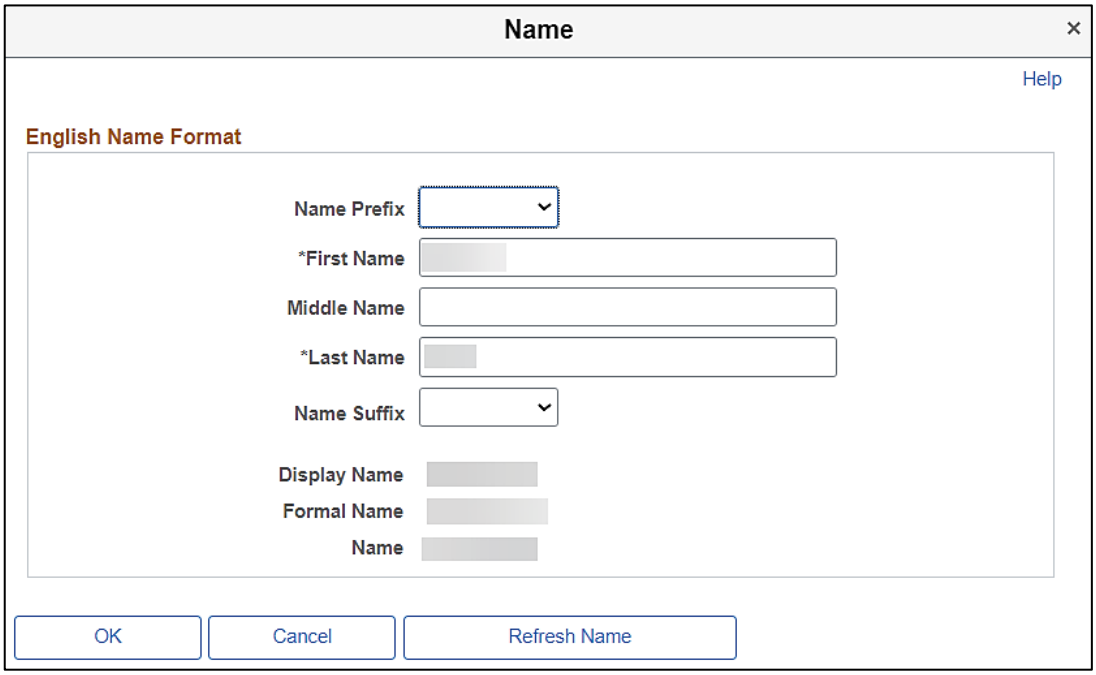


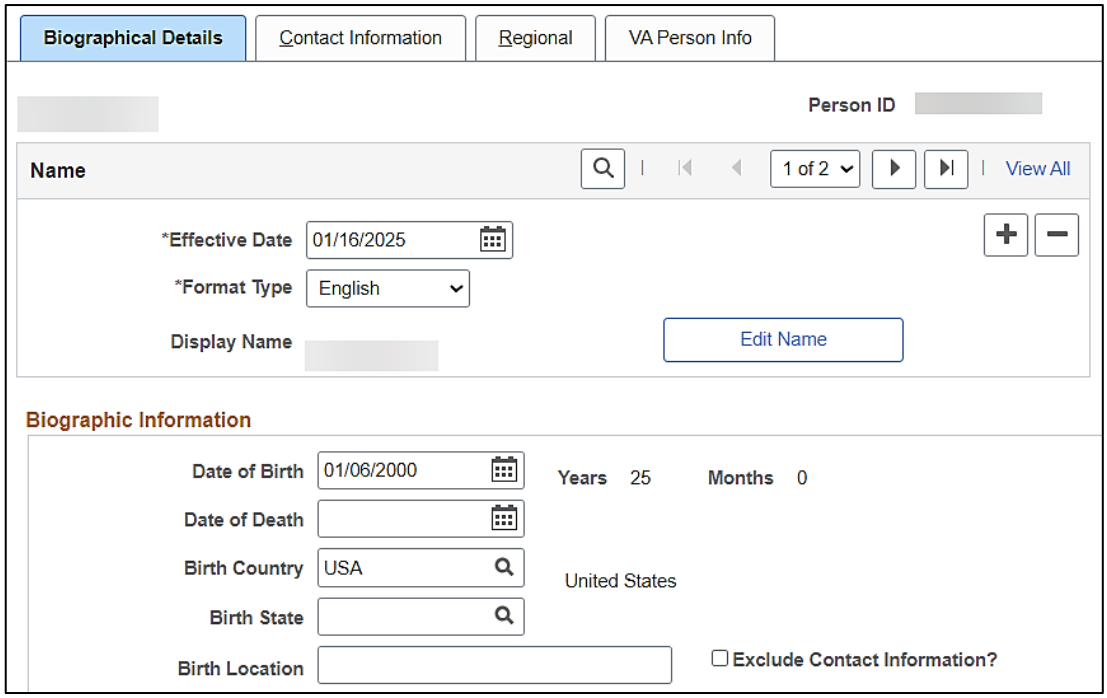
1.	Click the **Add a New Row** icon in the **Name** section.

The **Name** section refreshes for the employee with a new effective dated row.



When a new row is created, the row count increases by one and the **Effective Date** field defaults to the current date.

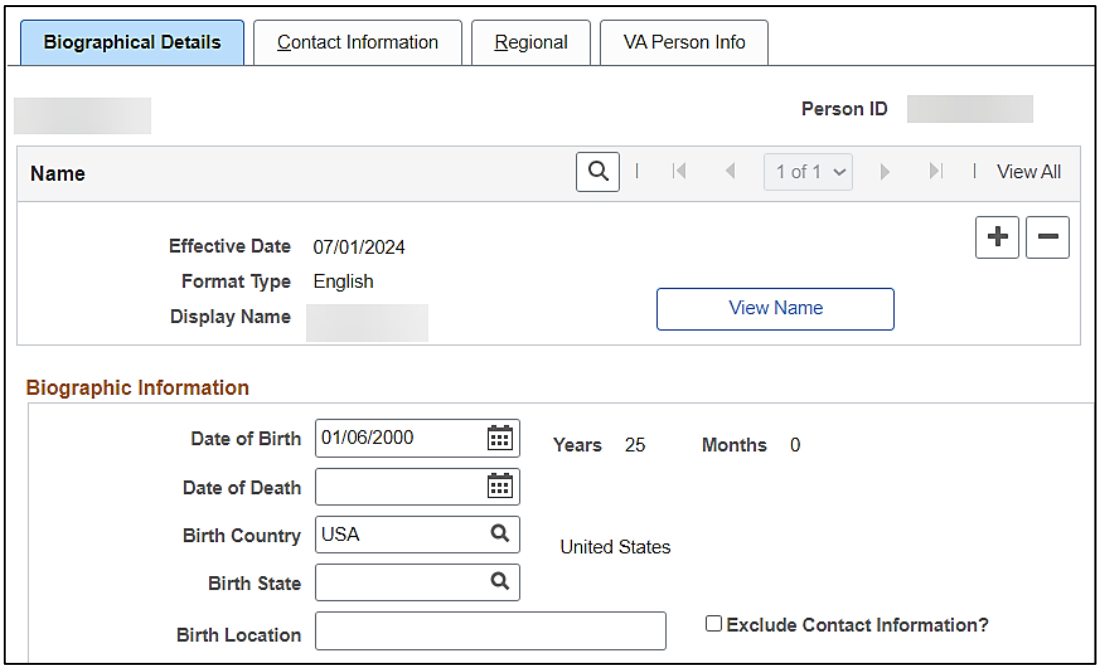
Step	Action
2.	Click the **Effective Date Calendar** icon and update the effective date of the name change as needed. 
	The effective date of the name change must be later than the current effective date. This section does not use the effective sequencing which allows use of the same effective date more than once.
3.	Click the **Edit Name** button.
The **Name** page displays in a pop-up window. 	
4.	Make the applicable updates and then click the **OK** button.

Step	Action
	The **Biographical Details** tab redisplays. 
	The updated name will appear in the **Name** section if the effective date has occurred. Otherwise, the current name will show until the effective date of the new name. The **Biographic Information** section contains items that are not effective dated such as the date of birth and date of death. The **Birth Location** field is not currently used in Cardinal. The **Exclude Contact Information?** checkbox option, when checked, will exclude the employee from appearing in employee data extracts. One example of when this would be checked is if an employee has a court order of protection in place.
5.	Click the **Save** button once all required updates are made.

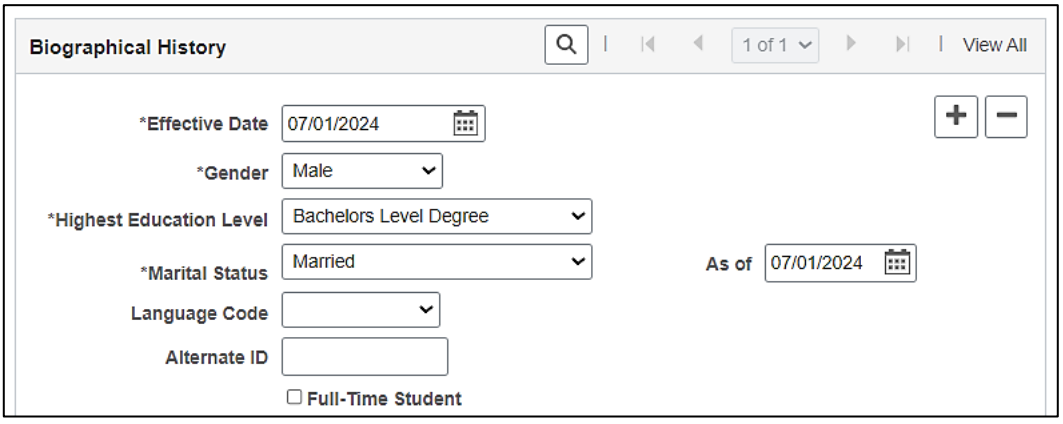
Updating Biographical History Information – Gender, Highest Education Level, or Marital Status

To update an employee's biographical history information, users must first navigate to the **Modify a Person** page by following the instructions in the Navigating to the Modify a Person Page section of this Job Aid.

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



1.	Scroll down to the **Biographical History** section as needed.

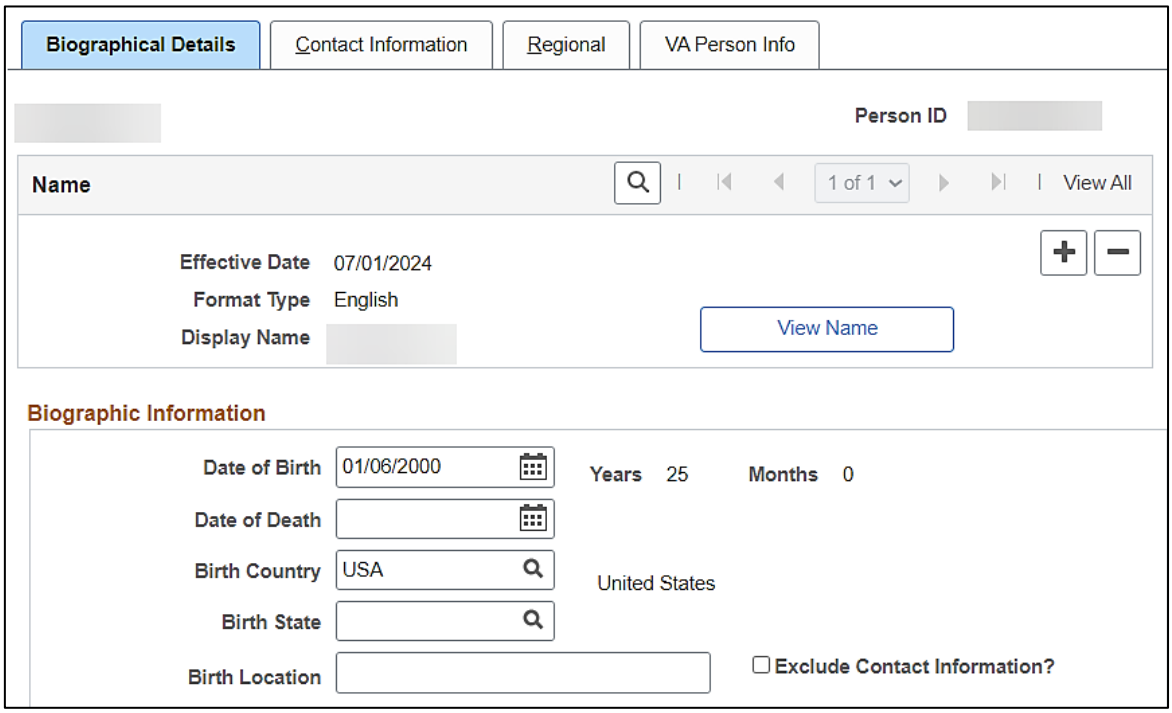


Step	Action
2.	Click the **Add a New Row** icon to make effective dated changes as needed to the employee's gender, highest education level, or marital status and then make the applicable changes.
3.	Click the **Save** button once all required updates are made.

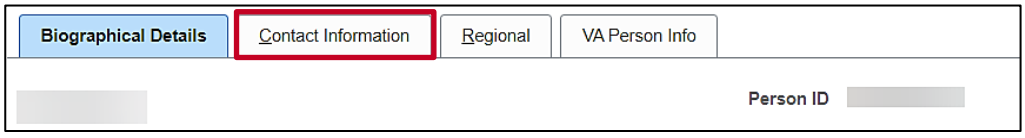
Updating Contact Information – Address, Phone, or Email Address

To update an employee's contact information, users must first navigate to the **Modify a Person** page by following the instructions in the Navigating to the Modify a Person Page section of this Job Aid.

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

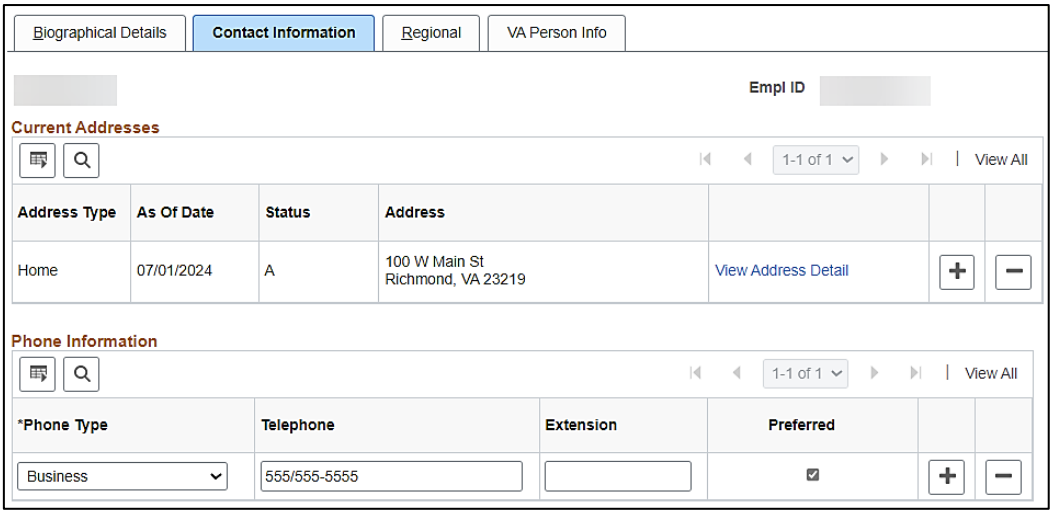


1.	Click the **Contact Information** tab.

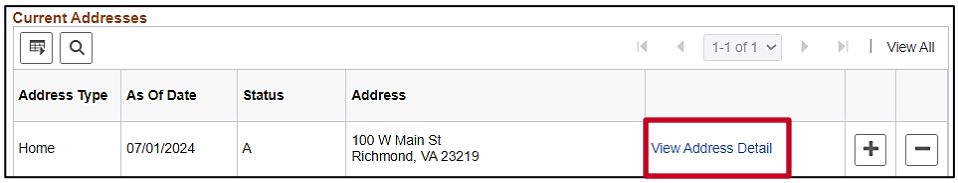


Step	Action

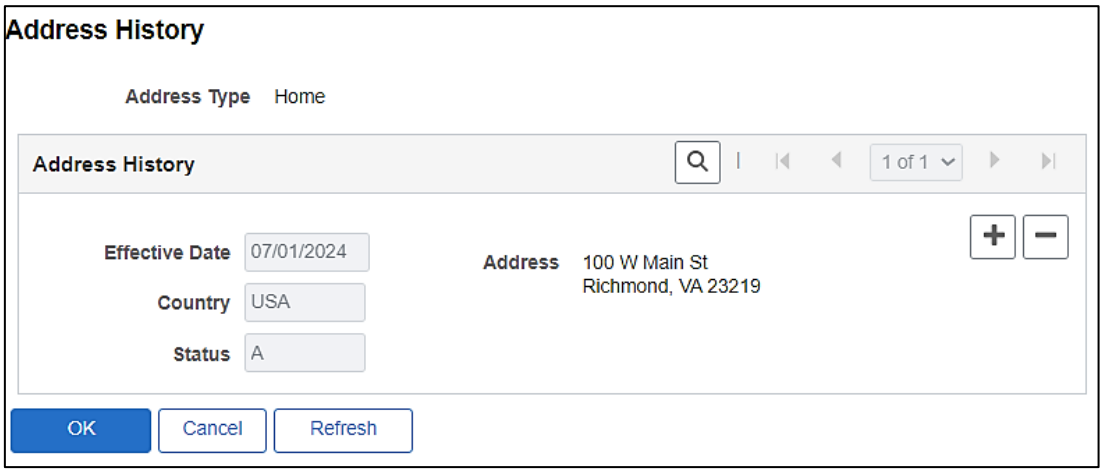
The **Contact Information** tab displays.



2. Click the **View Address Detail** link to update the employee's address.

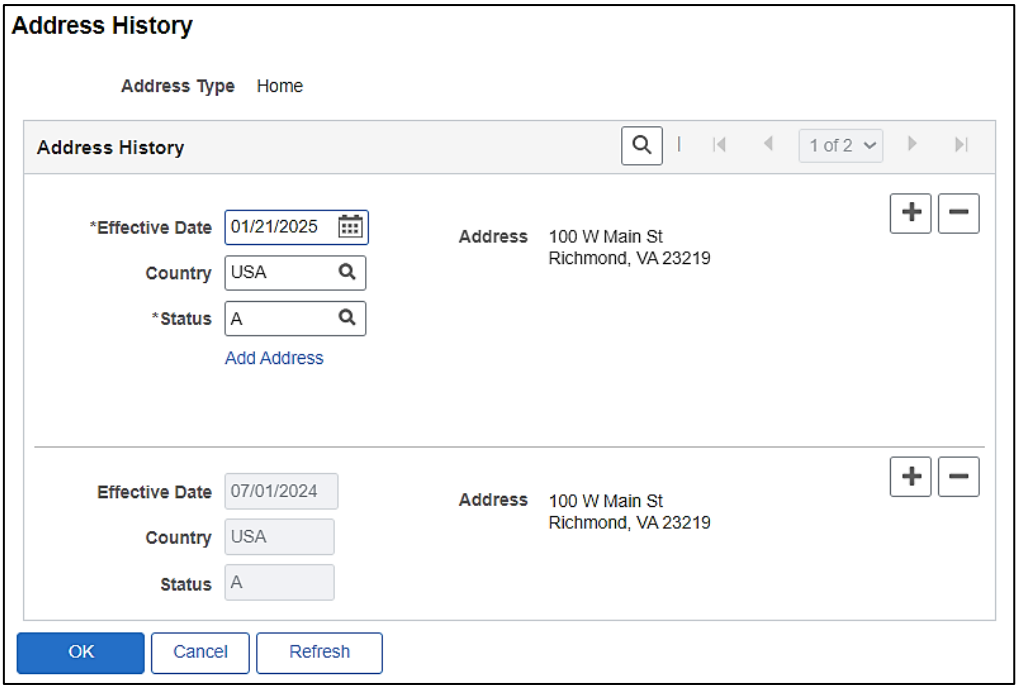


The **Address History** page displays.

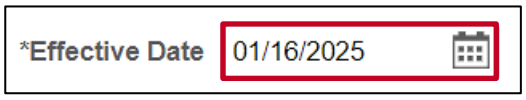


3. Click the **Add a New Row** icon.

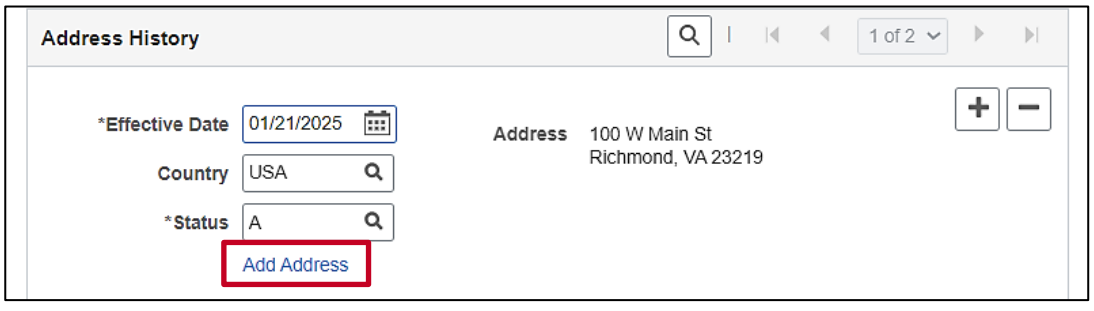
Step	Action
	The **Address History** page refreshes with the new effective dated row displayed.



	When a new row is created, the row count increases by one and the **Effective Date** field defaults to the current date.
4.	Click the **Effective Date Calendar** icon and update as needed.



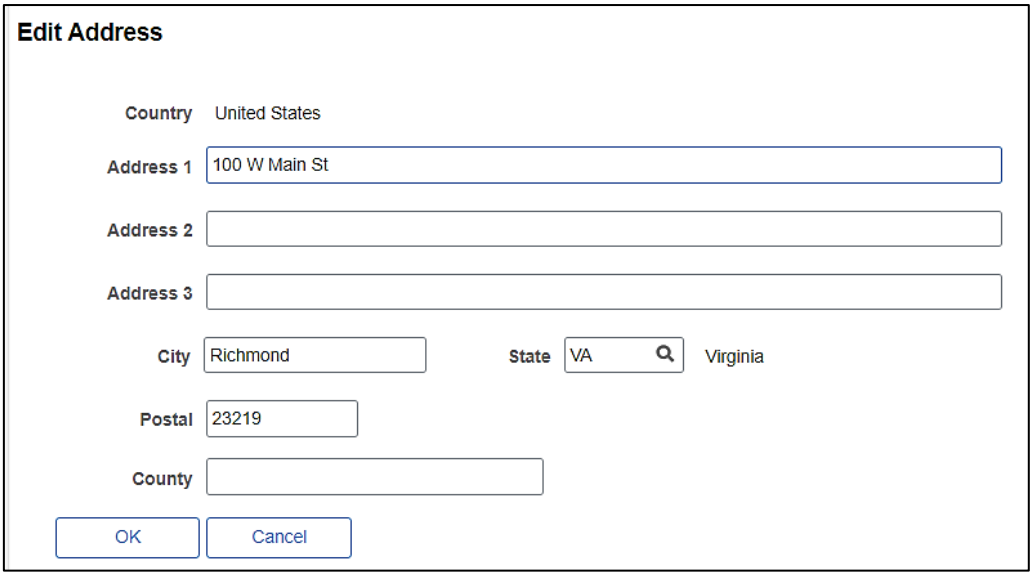
5.	Click the **Add Address** link.



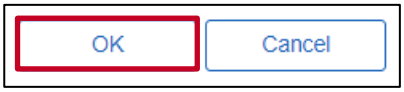
	An Address Type of “Home” is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address in both fields.

Step	Action

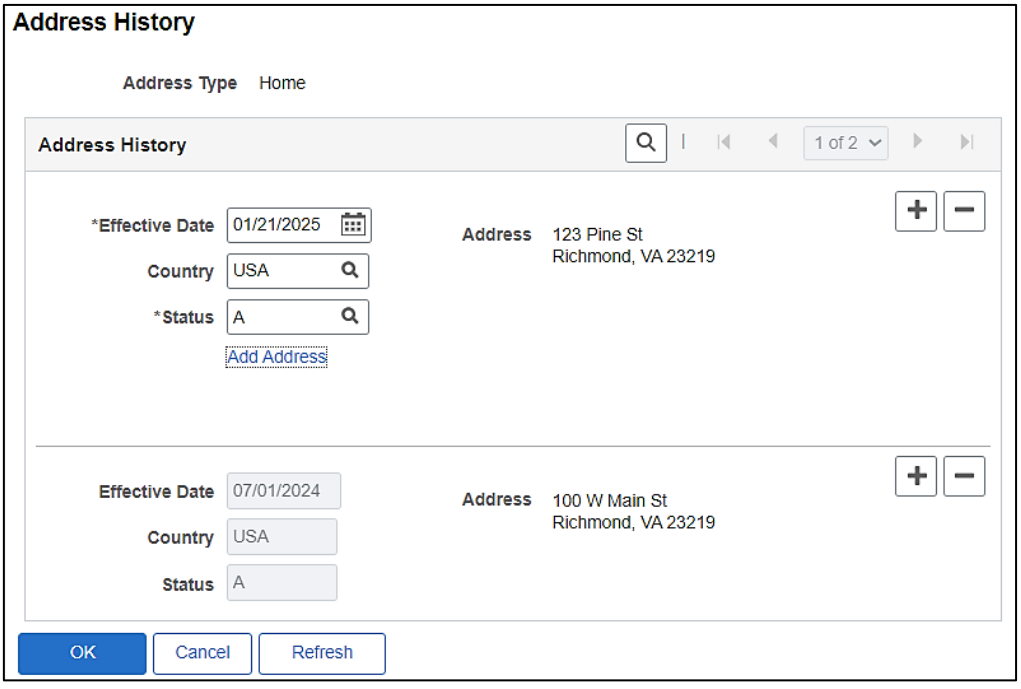
The **Edit Address** page displays.



6. The **Address** fields default with the employee's current address information. Update the address information as needed and then click the **OK** button.

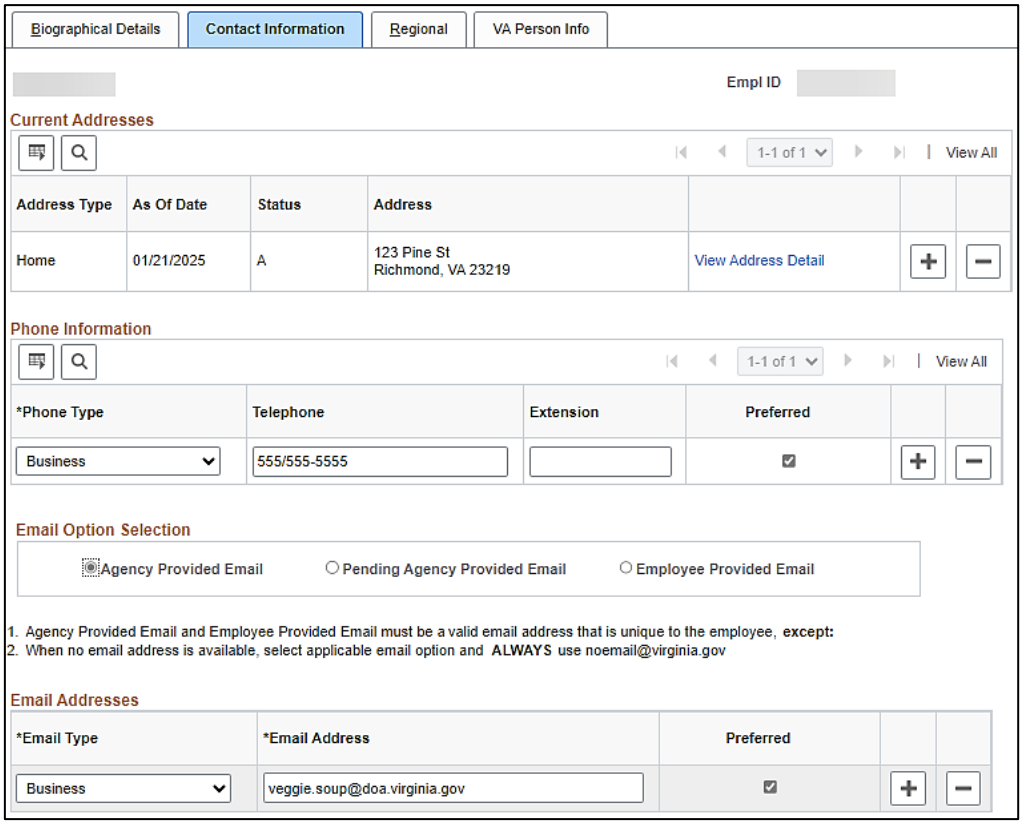


The **Address History** page redisplays with the updated address information.



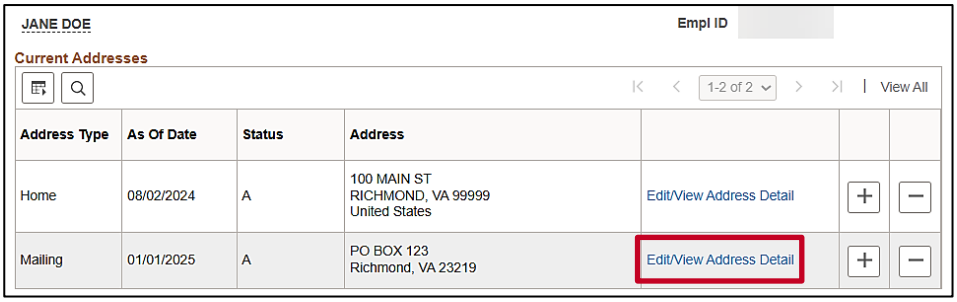
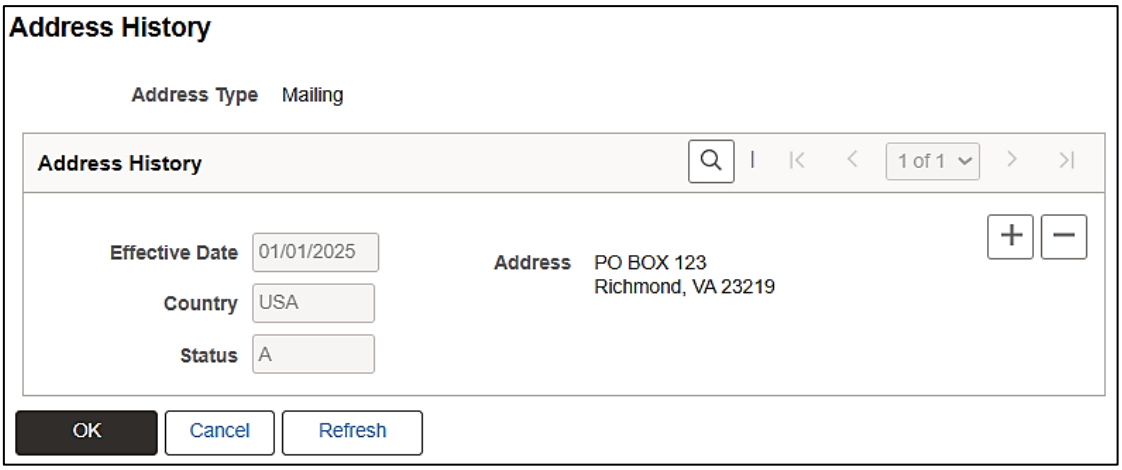
Step	Action
7.	Click the **OK** button.

The **Contact Information** page refreshes with the updated address information displayed.

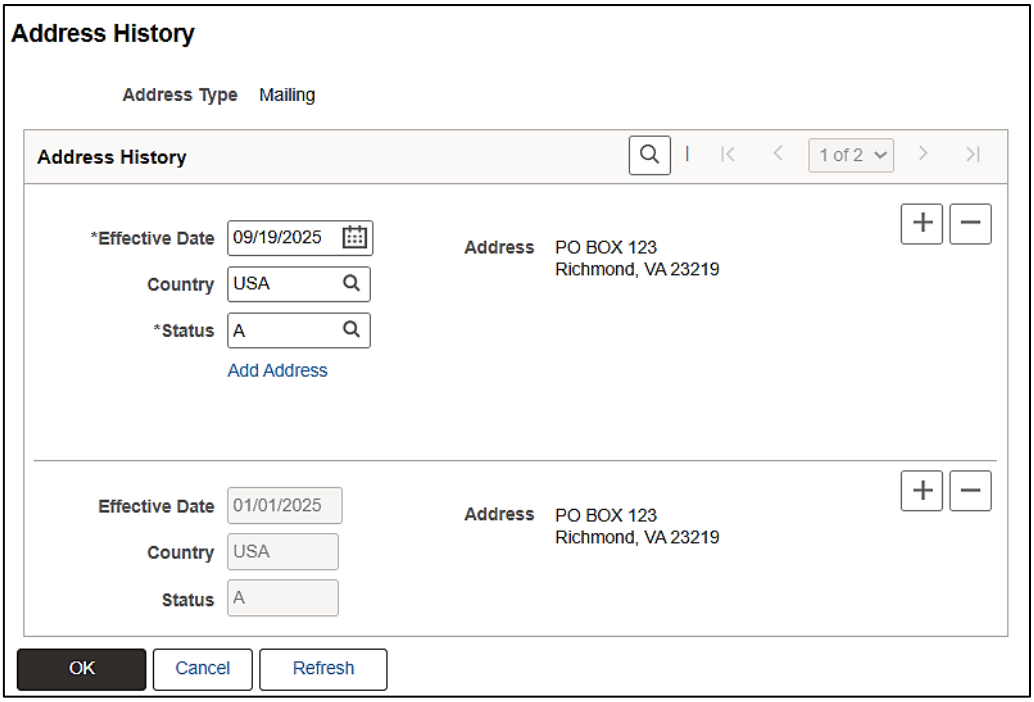


Mailing addresses should not be deleted from Cardinal as history should not be removed. However, the **Status** field for a mailing address can be changed to "Inactive". Follow **Steps 8 – 13** to inactivate a mailing address.

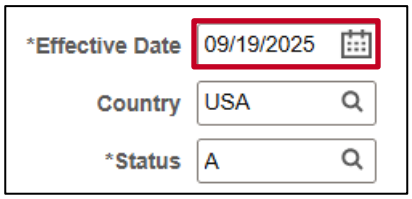
Home addresses must indicate where an employee physically resides for benefit eligibility purposes. Home addresses may be changed but cannot be inactivated.

Step	Action
8.	Click the **Edit/View Address Detail** link in the applicable row. 
	The **Address History** page displays. 
9.	Click the **Add a New Row** icon.

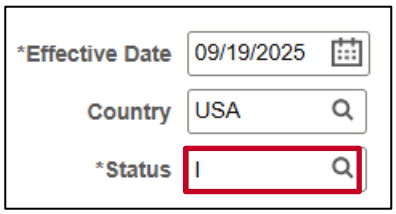
Step	Action
	The **Address History** page refreshes with an additional effective dated row.



10.	Click the **Effective Date Calendar** icon and select the applicable date.

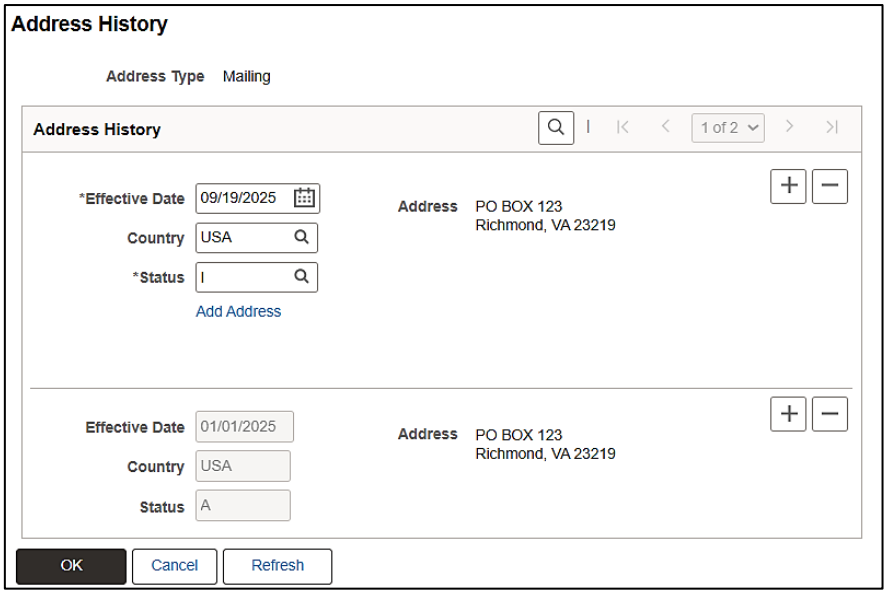


	The effective date of the address change must be later than the current effective date. This section does not use effective sequencing which allows use of the same effective date more than once.
11.	Click the **Status Look up** icon and select the “I” (Inactive) list item.



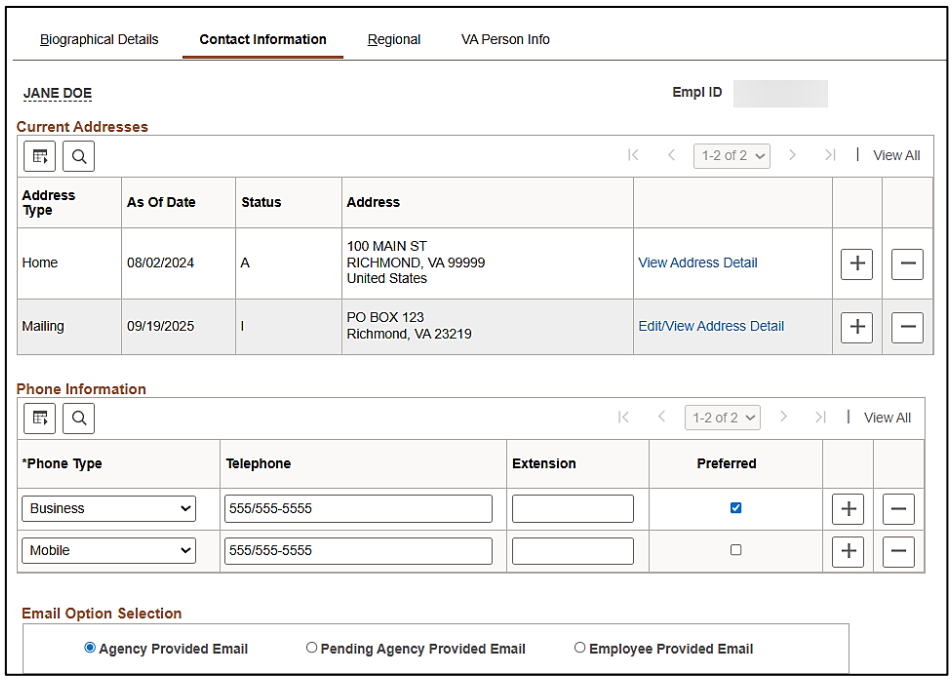
Step	Action

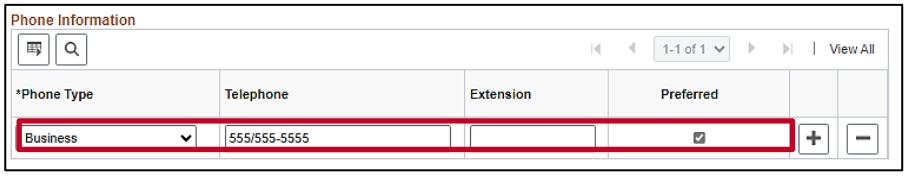
The **Address History** page redisplays.



12. Click the **OK** button.

The **Contact Information** tab redisplays with the **Status** of the mailing address displayed as "I" (Inactive).



Step	Action
13.	Click the **Save** button.
14.	To update a phone number for the employee, simply highlight the existing value and update the phone number (no new effective dated row is needed). 
15.	Click the **Add a New Row** icon in the **Phone Information** section to add a new additional phone number.
16.	Enter the new additional phone number information in the new row.

17. To update an email address for the employee, complete these sections based on the following guidelines:

a. If the employee has been issued a business email:

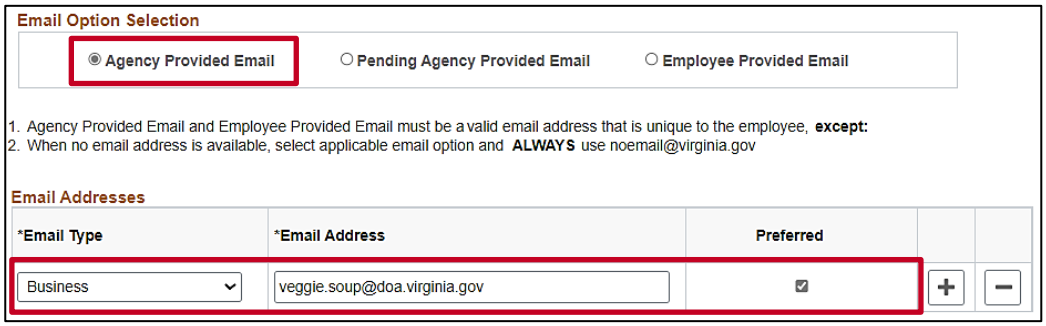
i. Click the **Agency Provided Email** radio button option

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

Note: Notify the employee of their email and provide information to register for Cardinal Employee Self-Service using this email.



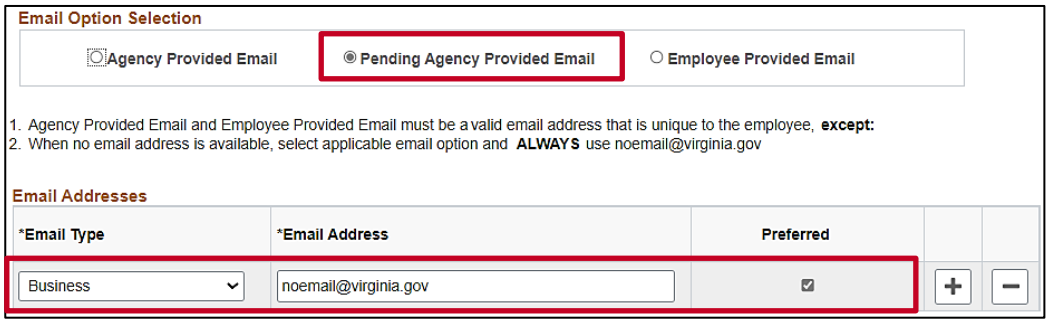
b. If the employee’s business email has been requested, but not yet assigned:

i. Click the **Pending Agency Provided Email** radio button option

ii. Click the **Email Type** dropdown button and select “Business”

iii. Enter “Noemail@virginia.gov” in the **Email Address** field

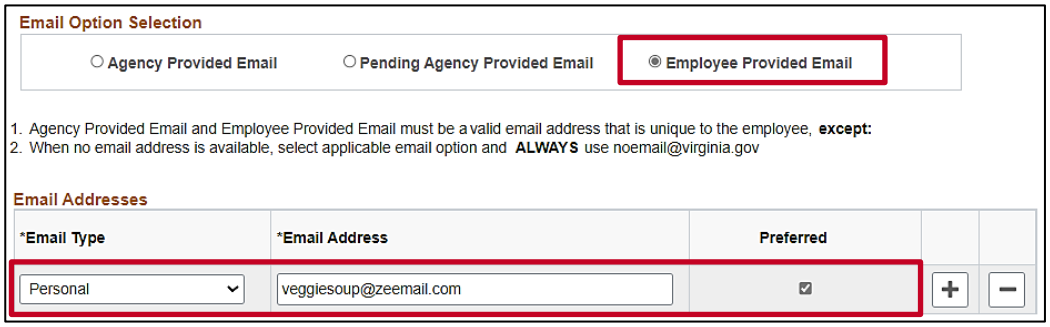
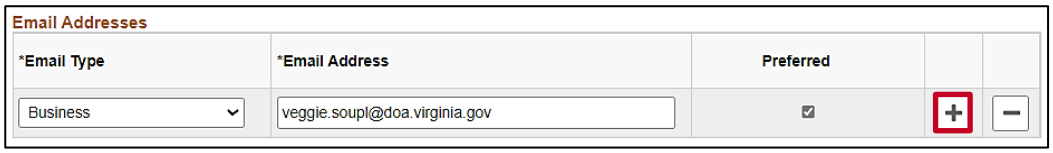
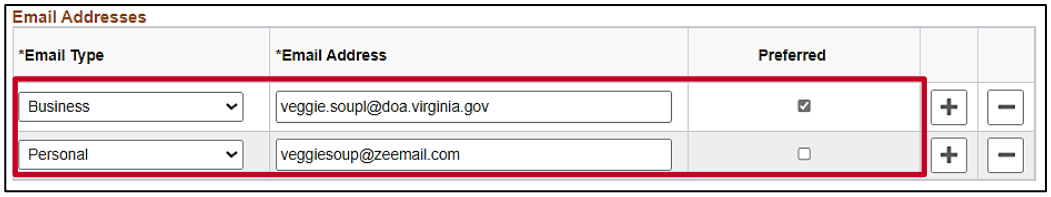
iv. Select the **Preferred** checkbox option



Note: The **Missing Email** query is helpful to find employees who still have the placeholder email address of noemail@virginia.gov in the Agency.

Once the employee’s business email is obtained, replace this email address with their new email address. Notify the employee of their email address and provide information to register for Cardinal Employee Self-Service using this email.

If this is not updated, the employee will not be able to register for access to the Cardinal Employee Self-Services features.

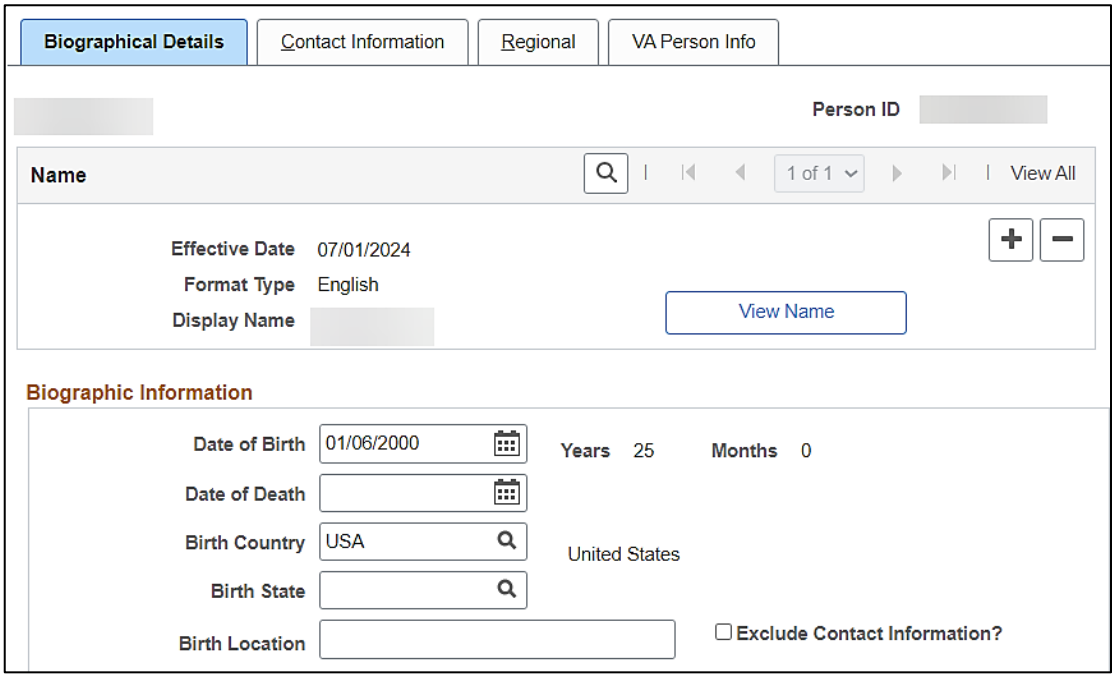
Step	Action
	c. If the employee will not be provided with a business email: i. Click the **Employee Provided Email** radio button option ii. Click the **Email Type** dropdown button and select "Personal" iii. Enter the email address in the **Email Address** field iv. Select the **Preferred** checkbox option **Note**: The employee will use the email provided to register and access the Cardinal Employee Self-Services features. 
18.	Click the **Add a New Row** icon in the **Email Address** section to add a new email address. 
19.	Select the **Email Type** and enter the new email address information in the **Email Address** field. 
	More than one type of email address can be entered (e.g., personal and business). However, the **Preferred** checkbox option must be selected for one email address. The "Business" email should be selected as "Preferred". **Note**: For employees with multiple jobs at different agencies, the Business Email address must match the Agency that owns the primary job. A salaried job will become the primary job during a periodic batch process. For wage jobs, the employee's oldest wage job will remain the primary job.

Step	Action
20.	Click the **Save** button once all required updates are made.

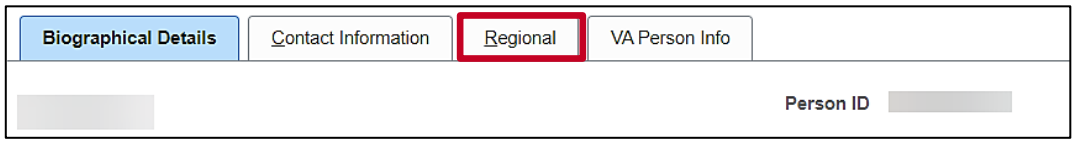
Updating Ethnic Group and Military Status

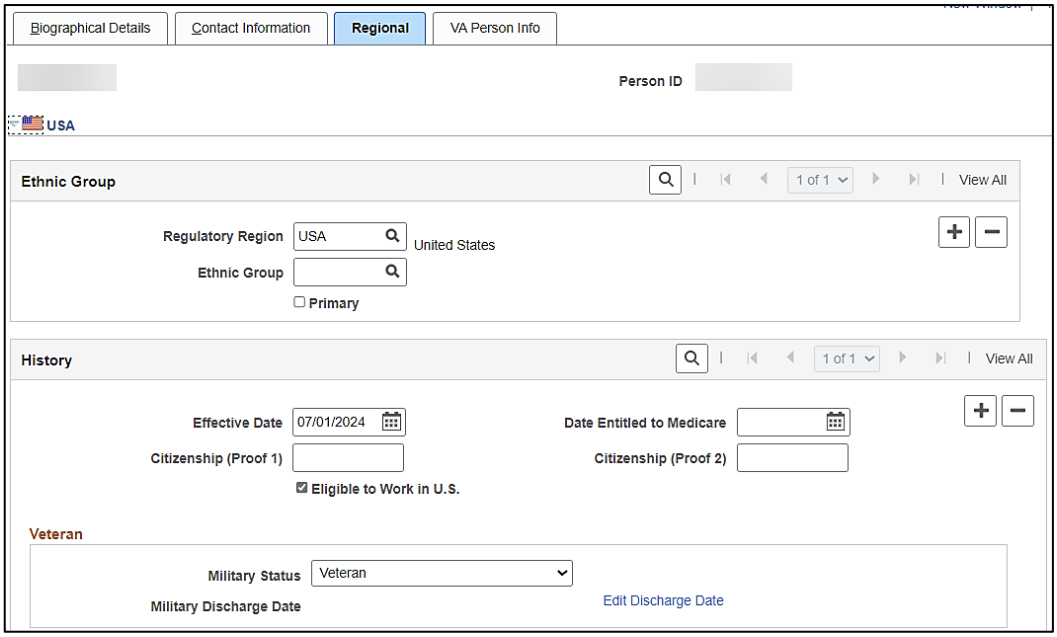
To update an employee's ethnic group or military status, users must first navigate to the **Modify a Person** page by following the instructions in the Navigating to the Modify a Person Page section of this Job Aid.

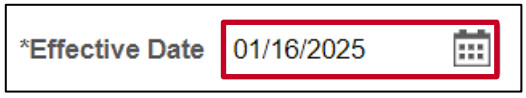
Step	Action
	The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.



1.	Click the **Regional** tab.



Step	Action
	The **Regional** tab displays. 
2.	Click the **Ethnic Group Look up** icon and select the employee's ethnic group.
	Multiple Ethnic Groups can be selected using the **Add a New Row** icon. These rows are not effective dated.
3.	Click the **Add a New Row** icon within the **History** section to update the employee's military status after their hire action is completed.
	Updates to military status require a new effective dated row. When a new row is created, the row count increases by one and the **Effective Date** field defaults to the current date.

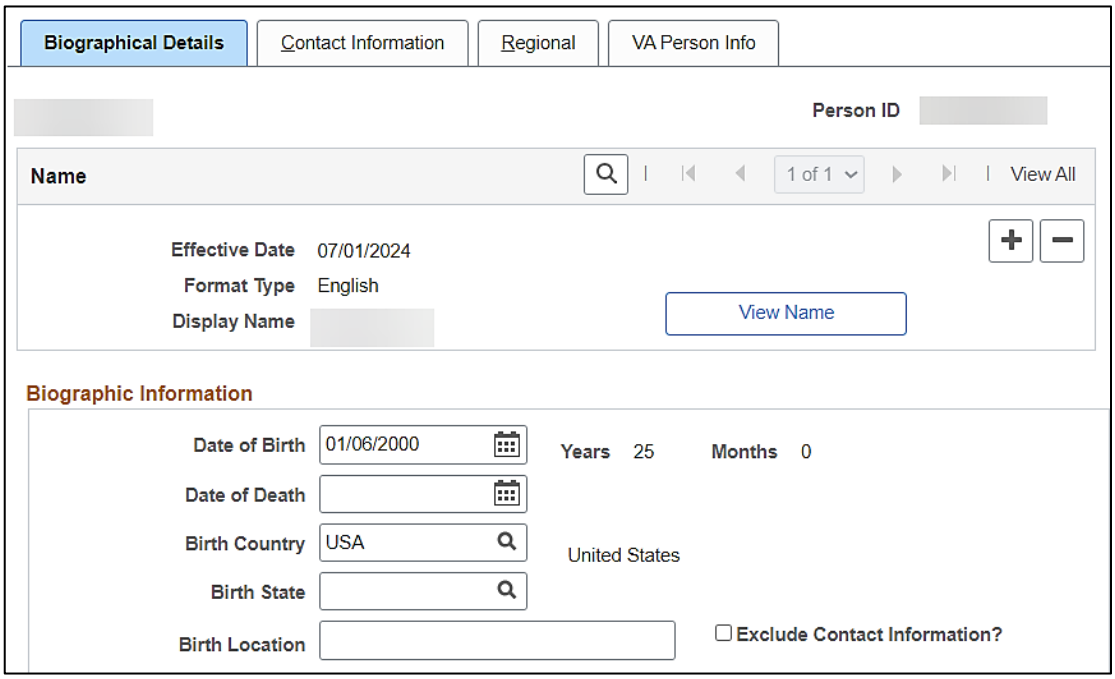
Step	Action
4.	Click the **Effective Date Calendar** icon and select the effective date of the military status change as needed. 
5.	Click the **Military Status** dropdown button and select the updated military status.
6.	Click the **Save** button.

Updating VA Person Information

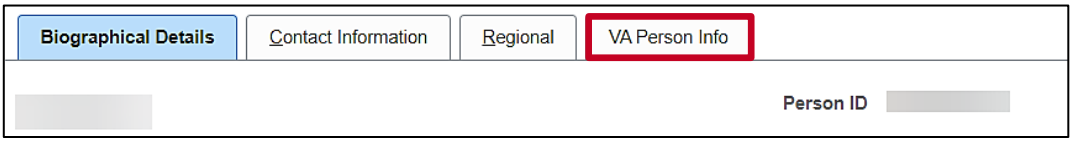
To update an employee's VA Person information, users must first navigate to the **Modify a Person** page by following the instructions in the Navigating to the Modify a Person Page section of this Job Aid.

Step	Action

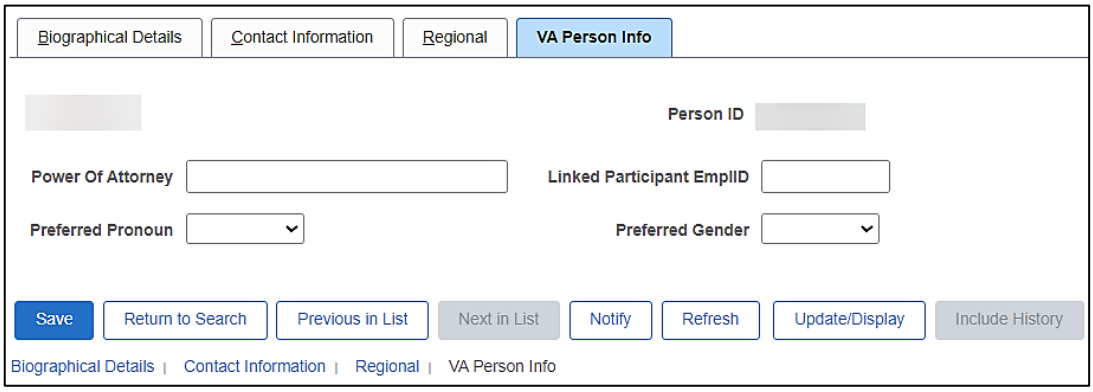
The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.



1. Click the **VA Person Info** tab.



The **VA Person Info** tab displays.



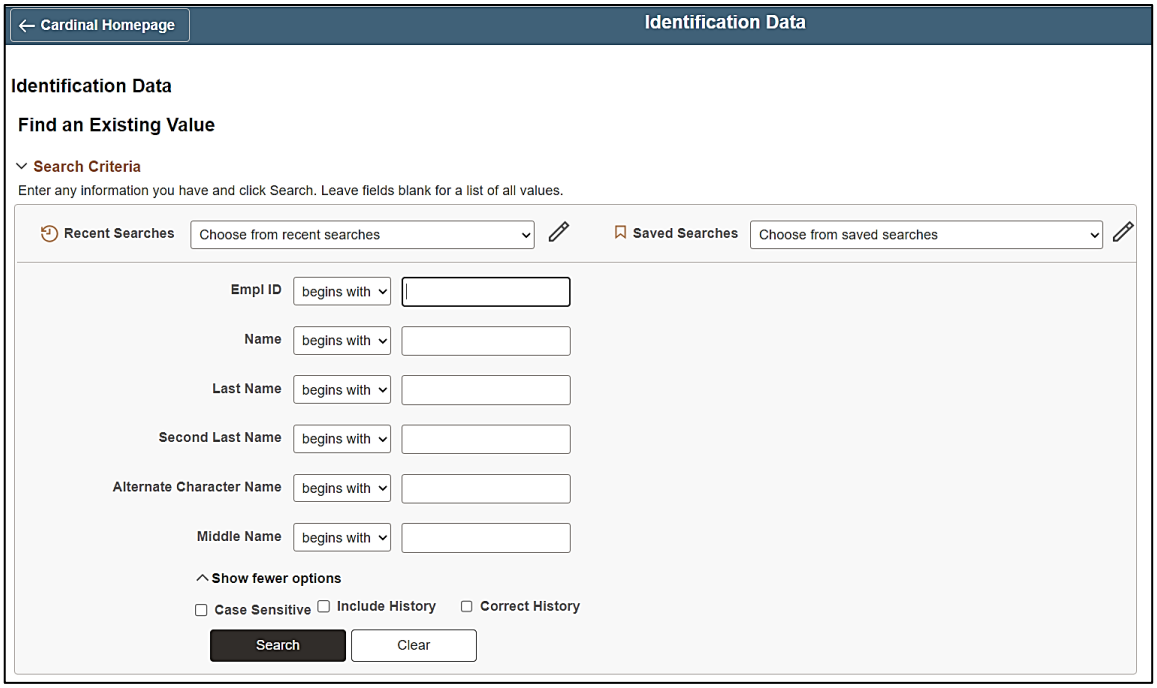
Step	Action
	This page is not effective dated. There is not a field for an effective date or a way to insert a row. The user will simply make the change to the necessary field and save the record.
2.	Enter the name of the person who has legal Power of Attorney for the employee in the **Power of Attorney** field if applicable.
	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.
3.	Enter the applicable employee ID in the **Linked Participant EmplID** field if the employee is linked to another employee of the Commonwealth of Virginia.
	For more information on linked retirees and dependents, see the Job Aid titled **BN361 Linking Dependents and Retirees** on the Cardinal website in **Job Aids** under **Learning**.
4.	Click the **Preferred Pronoun** dropdown button and select the preferred pronoun provided by the employee.
5.	Click the **Preferred Gender** dropdown button and select the preferred gender provided by the employee.
	The preferred pronoun and preferred gender can be entered or updated via Employee Self-Service (ESS) by the employee.
6.	Click the **Save** button.

Updating Citizenship Status

When updating the citizenship status, there is no need to add a row on this page. Override the current values with the new values. History is not maintained for this information in Cardinal.

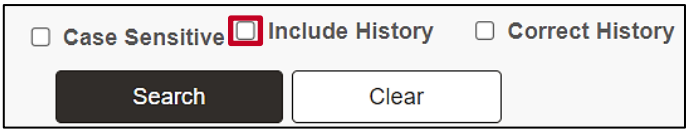
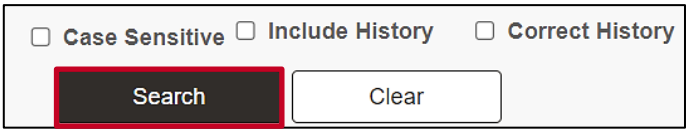
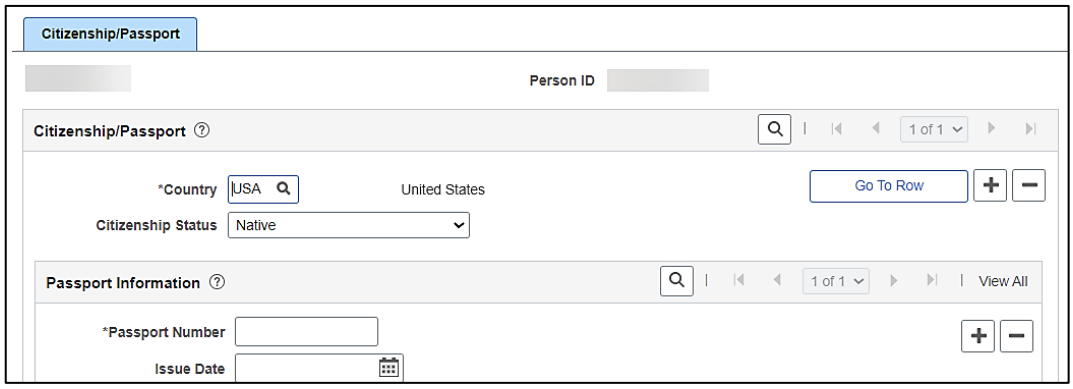
Step	Action
1.	Navigate to the **Identification Data** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Citizenship > Identification Data**

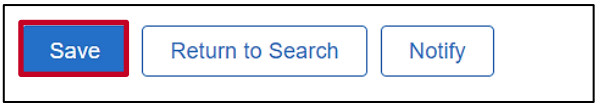
The **Identification Data Find an Existing Value Search** page displays.



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

2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

Step	Action
3.	Click the **Include History** checkbox option. 
4.	Click the **Search** button. 
The **Identification Data** page for the employee displays with the **Citizen/Passport** tab displayed by default. 	
5.	Verify that the **Country** field is populated with “USA”. This field must always be “USA” as this field references the country of employment.
	If the **Country** field does not display “USA”, update the field.
6.	Click the **Citizenship Status** dropdown button and select the new status.
	The option for a US Citizen is “Native”. If the citizenship status is unknown at the time of hire, select “Not Indicated”. Do not leave this field blank. Reference the Citizenship Status Values section of this Job Aid for more guidance.

Step	Action
7.	Click the **Save** button. 

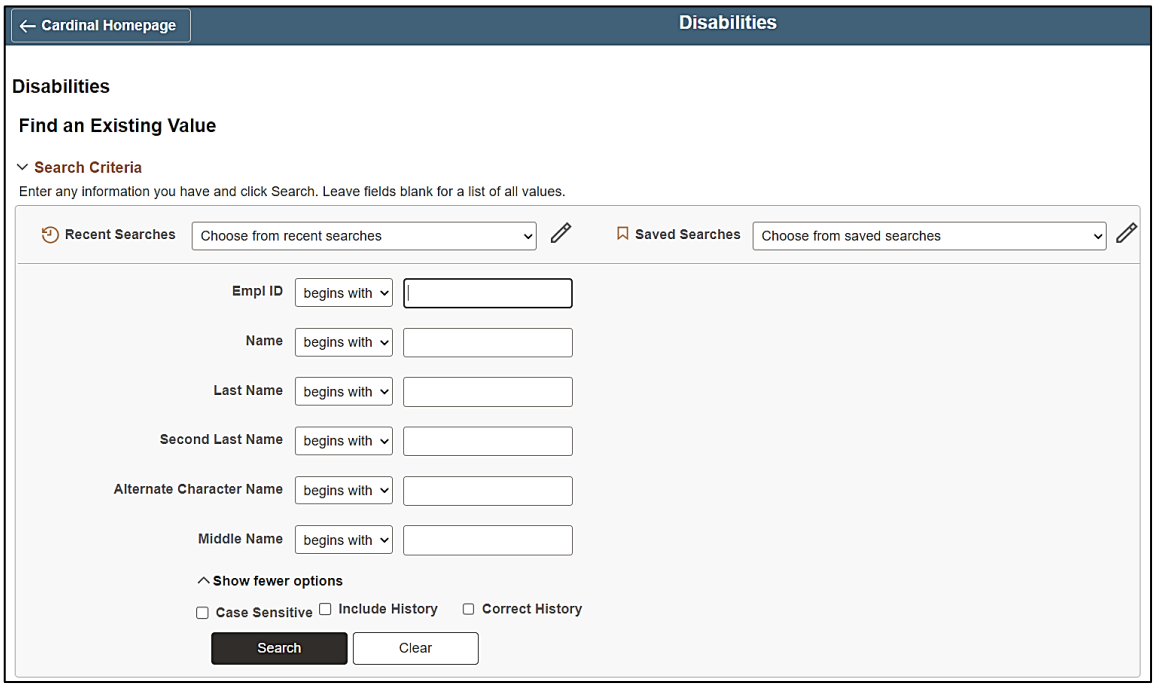
Citizenship Status Values

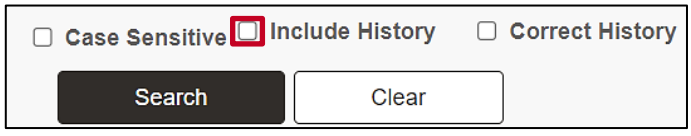
Citizenship Status	When to Use
Alien Permanent	Foreign national (green card holder) with permanent residence visa in the United States.
Alien Temporary	Non-citizens employed in the United States (work visa).
Canadian Citizen	Do not use. Use either “Alien Temporary” or “Alien Permanent” as applicable.
Employment Visa	Do not use. Use “Alien Temporary”.
Native	United States citizen.
Not Indicated	The employee’s citizenship is not indicated. This can be used by Agencies who do not use Cardinal as their HR system of record.
Other	Do not use. Use “Not Indicated”.
Permanent Resident	Do not use. Use “Alien Permanent”.

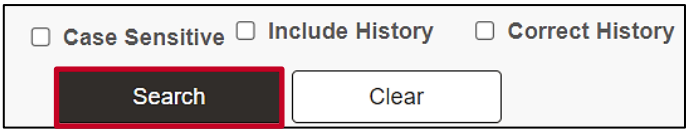
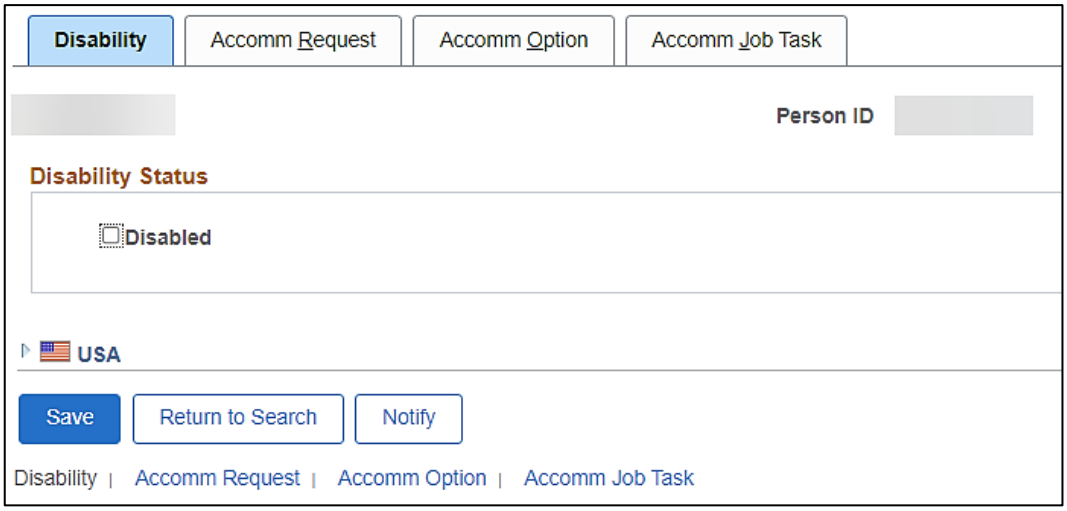
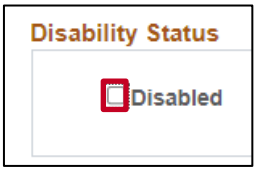
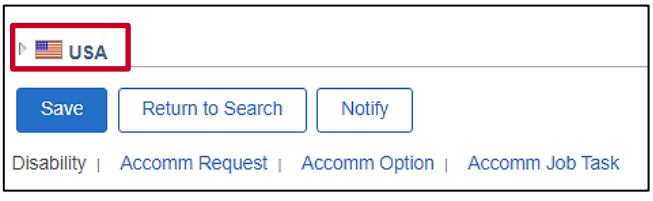
Updating Employee Disability Information

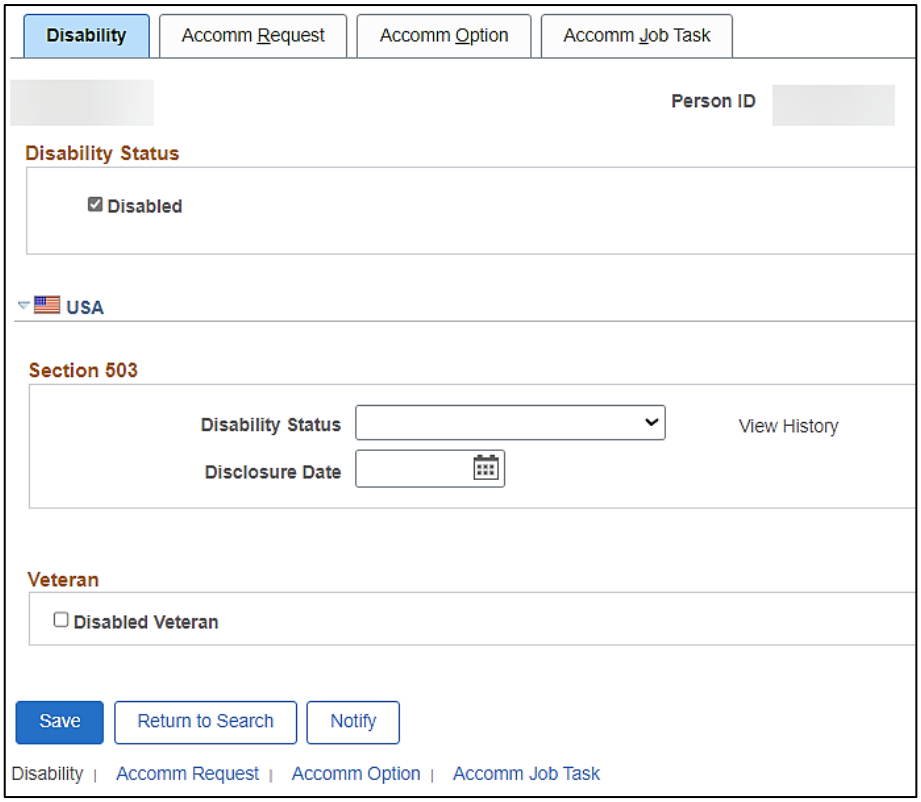
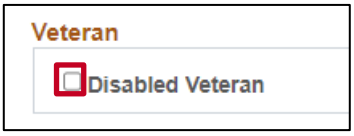
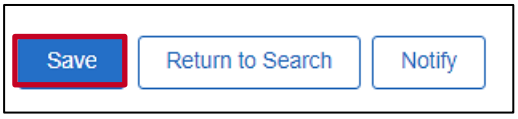
Step	Action
1.	Navigate to the **Job Data** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Disability > Disabilities**

The **Disabilities Find an Existing Value Search** page displays.



	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
3.	Click the **Include History** checkbox option. 

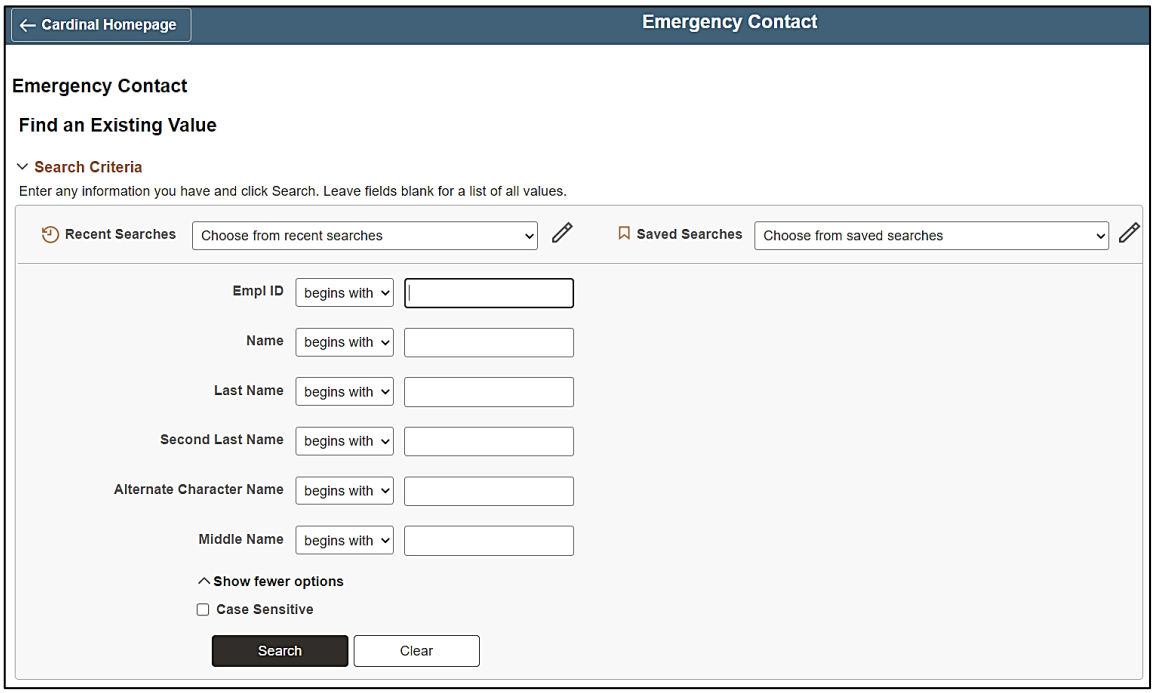
Step	Action
4.	Click the **Search** button. 
The **Disabilities** page for the employee displays with the **Disability** tab displayed by default. 	
	The **Accomm Request**, **Accomm Option**, and **Accomm Job Task** tabs are not utilized in Cardinal.
5.	Click the **Disabled** checkbox option. 
6.	Click the **USA Expand** icon to expand the section. 

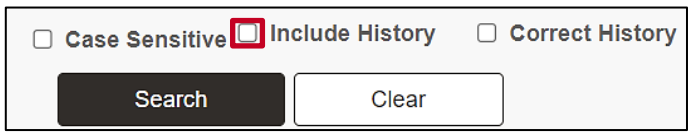
Step	Action
	The **Section 503** and **Veteran** sections display. 
7.	Click the **Disability Status** dropdown button and select the applicable disability status.
8.	If the employee is a disabled veteran, as identified on their DD214, click the **Disabled Veteran** checkbox option in the **Veteran** section. 
9.	Click the **Save** button. 

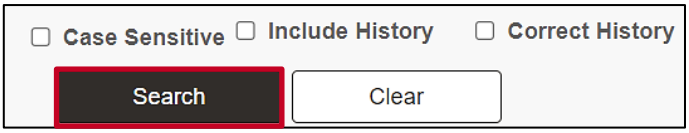
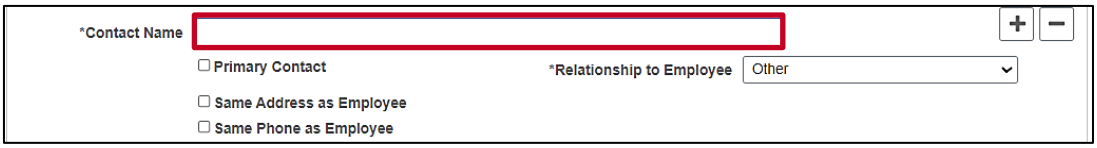
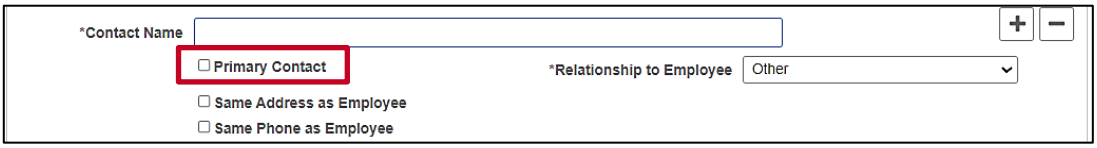
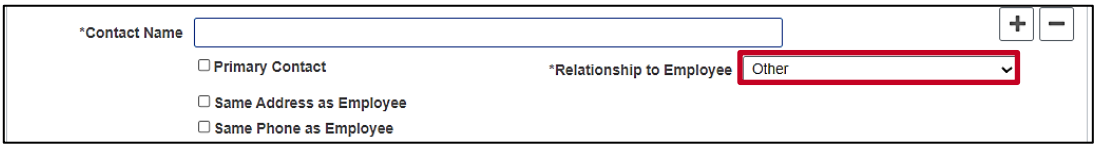
Updating Emergency Contact Information

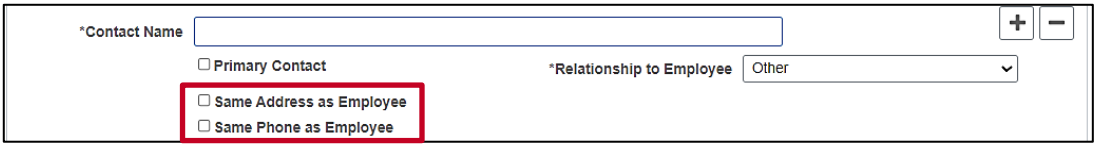
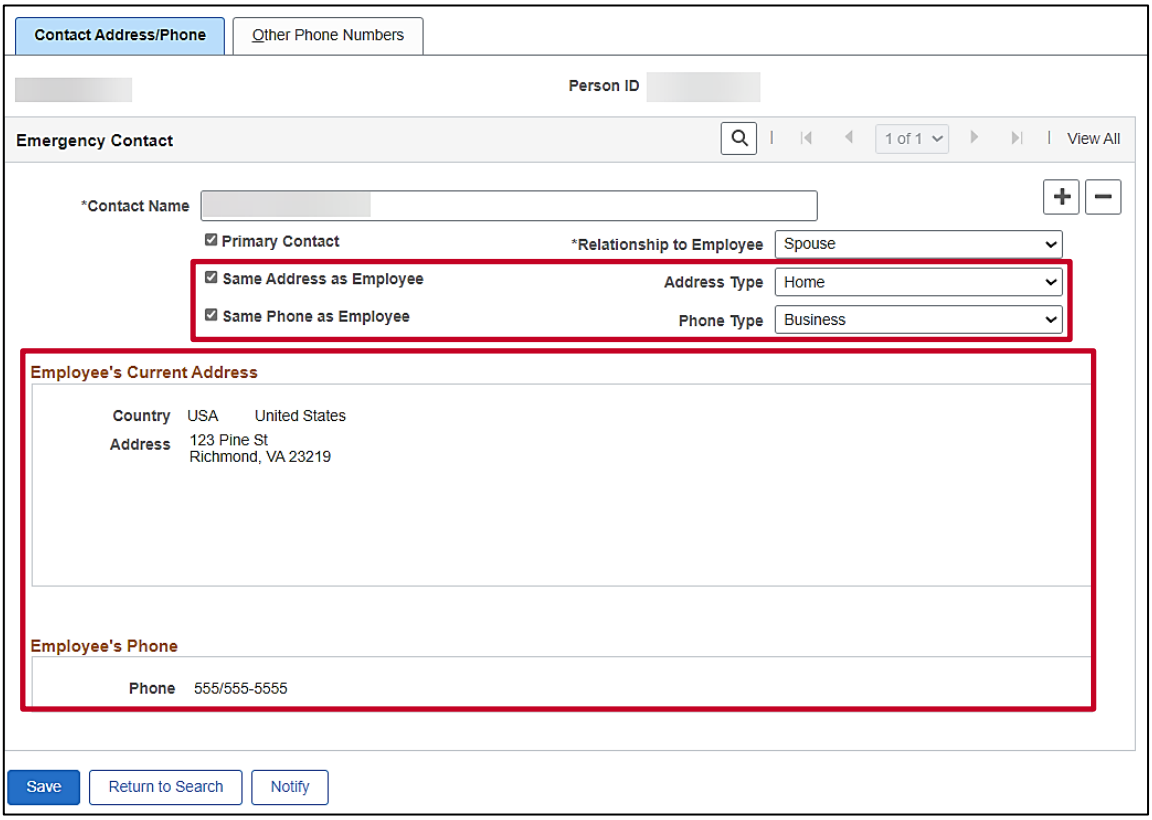
Step	Action
1.	Navigate to the **Emergency Contact** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact**

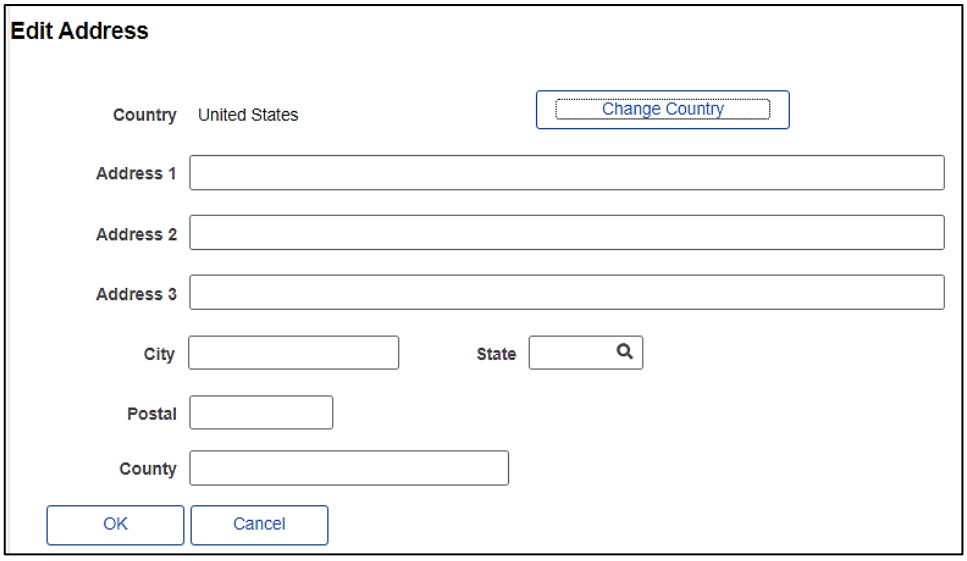
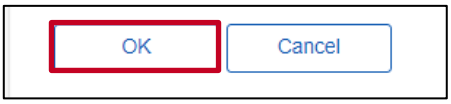
The **Emergency Contact Find an Existing Value Search** page displays.

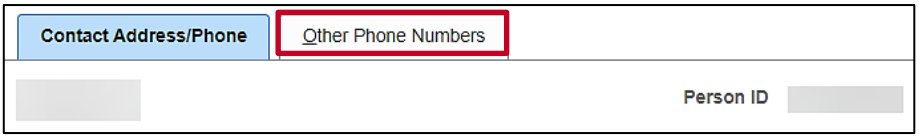
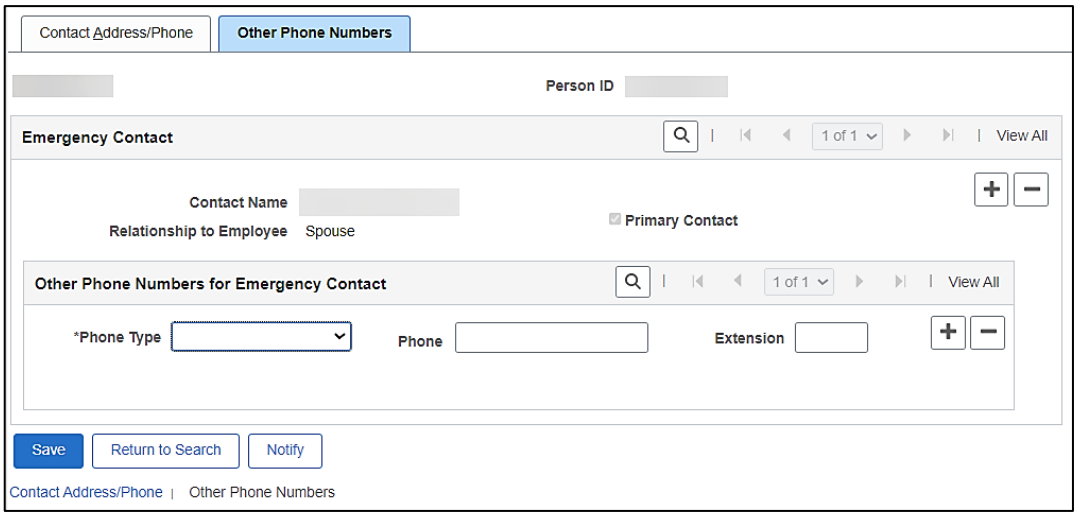
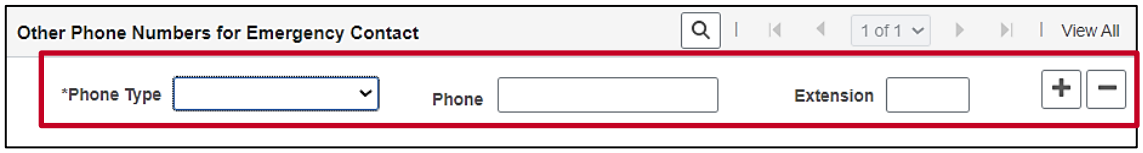
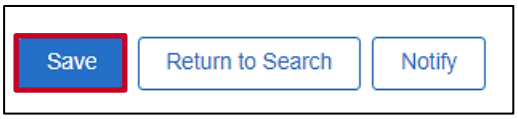


	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
3.	Click the **Include History** checkbox option. 

Step	Action
4.	Click the **Search** button. 
The **Emergency Contact** page for the employee displays with the **Contact Address/Phone** tab displayed by default. 	
5.	Enter the emergency contact's first and last name in the **Contact Name** field. 
6.	If this is the employee's primary contact, check the **Primary Contact** checkbox option. Otherwise leave unchecked. 
7.	Click the **Relationship to Employee** dropdown button and select the applicable value. 

Step	Action
8.	If the emergency contact's address and/or phone number is the same as the employee, click the **Same Address as Employee** and/or **Same Phone as Employee** checkbox options. 
	If the **Same Address as Employee** checkbox option is checked, the **Contact Address** section changes to **Employee's Current Address** and the address in Personal Data for the employee displays in this section. The **Address Type** field updates to "Home". If the **Same Phone as Employee** checkbox option is checked, the preferred phone number in Personal Data for the employee displays in the **Employee's Phone** section and the **Phone Type** field updates to the option selected as the employee's preferred phone type. 
9.	If the emergency contact's address is not the same as the employee, click the **Edit Address** button in the **Contact Address** section.

Step	Action
	The **Edit Address** page displays. 
10.	Complete all applicable fields on the **Edit Address** page for the emergency contact and then click the **OK** button. 
	The **Emergency Contact** page redisplays.
11.	Enter the emergency contact's phone number in the **Phone** field within the **Contact Phone** section.

Step	Action
12.	Click the **Other Phone Numbers** tab. 
The **Other Phone Numbers** tab displays. 	
13.	Enter the additional phone numbers in the **Other Phone Numbers for Emergency Contact** section as applicable. Use the **Add a New Row** icon as needed. 
14.	Click the **Save** button.