

Managing an Inter-Agency Transfer Overview

The Transfer Employee business process refers to the movement of an employee from one position to another position. This Job Aid addresses the following transfer transaction, otherwise known as an Inter-Agency Transfer:

- An employee transfers from one state Agency to another state Agency

Coordination between the Sending and Receiving Agencies is imperative as the effective dates and Action/Reasons of the transactions must be entered correctly by both Agencies to prevent inaccurate breaks in service and healthcare. The Sending Agency should enter a Termination/Transfer Out transaction, and the Receiving Agency should enter a Hire/Transfer In (XXX) transaction. The Sending Agency enters the transfer date (i.e., termination/transfer out effective date) as the day after last day worked (e.g., transfer date is 1/1/2026, but last day worked was 12/31/2025). The Receiving Agency must use the same date or the next day to prevent a break in service. The DHRM Policy Team recommends the following:

“The Receiving Agency should consult with the Sending Agency and determine the resignation/separation date. If there is a difference that involves a few days, then we encourage the former agency to approve the employee's use of LWOP and expand the separation date so there is no break in service.”

If applicable, the Receiving Agency must also update the employee's Agency Provided Email address in Personal Data, update the employee's telework agreement and process a leave balance adjustment.

All salaried employees who are transferring from one Agency to another must be terminated from their Sending Agency prior to being hired into their Receiving Agency. When these employees are in active salaried positions in both Agencies, Anthem, Aetna, and other healthcare providers receive data files that show the employee as active in two Agencies, which results in both records cancelling. When this data mismatch occurs, the healthcare vendors do not receive the updated information regarding the Agency change and the transferring employee loses health benefits coverage.

When transferring an employee from one Agency to another, the Agency Benefits Administrator will need to review benefit elections of the employee once the transfer to the Receiving Agency is complete. For more details, see the Job Aid titled **BN361 Managing Terminations and Transfers** located on the Cardinal website in **Job Aids** under **Learning**.

If the Receiving Agency uses Cardinal Absence Management, the HR Administrator of the Receiving Agency should request the salaried employee's leave balances as of the date of transfer from the Sending Agency. Leave balances do not transfer automatically in Cardinal, therefore the Receiving Agency will have to process a balance adjustment in the Time and Attendance module when the transfer is complete. For further details on balance adjustments, see the Job Aid titled **TA374 Managing Absence Balances** located on the Cardinal website in **Job Aids** under **Learning**.



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Per DHRM policy, Service Credit for Annual Leave Accruals, the annual leave accrual rate is determined by using state service and a veteran's service in the military, National Guard or Reserves. Veteran's service is determined by adding the net active service, total prior active service, and total prior inactive service data found on the form DD-214. To assist in identifying employees who are eligible, the RHR294-Disability and Veteran Service Report can be used. In order to run this report, the user must have the manager role due to the disability information on the report.

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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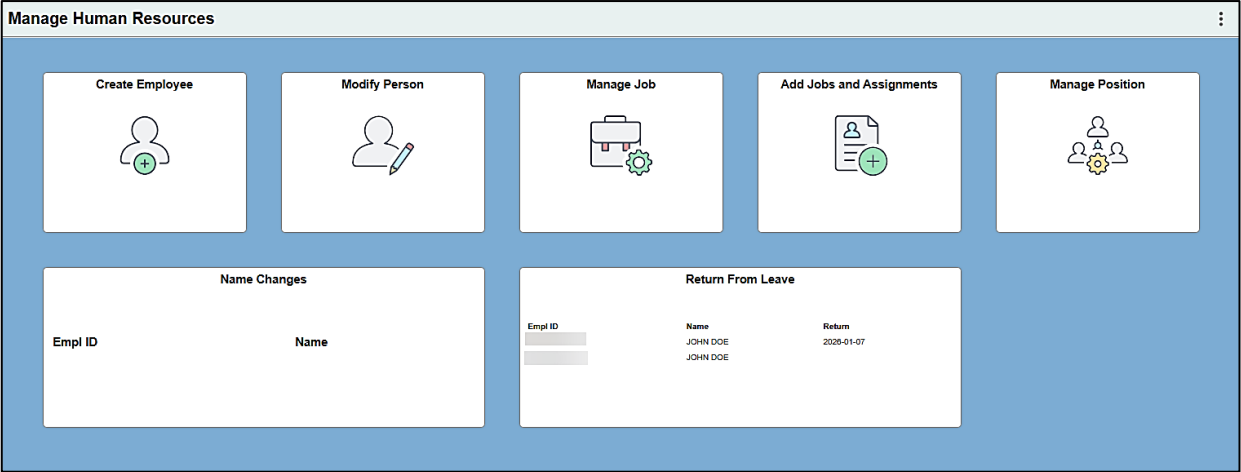
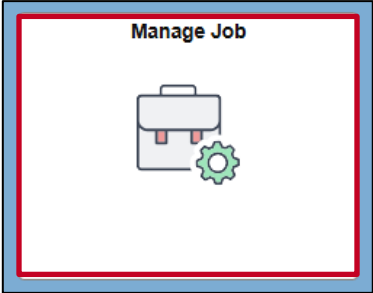
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
11/14/2025	Direct Deposit information added to the Updating the Employee Job Data section, including references to the Request Direct Deposit page.
4/29/2025	Updated the screenshot of the Benefit Program Participation page, updated the screenshot of the Benefits Administration Eligibility section, and added additional information regarding the Eligibility Fields.
3/1/2025	Updated the screenshots of the Search pages. Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Sending Agency Tasks

Termination/Transfer Out

Before beginning, the Sending Agency must coordinate the termination effective date with the Receiving Agency.

Step	Action
1.	Navigate to the Job Actions Summary page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
2.	Click the Manage Job tile. 

Step	Action
	The Manage Job Search Existing page displays. Manage Job Search Existing Search Criteria My Saved Searches Empl ID begins with Empl Record = Name begins with Last Name begins with HR Status begins with Business Unit begins with Department begins with Business Title begins with Include History Search Clear Save Search
	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.
3.	Click the Include History checkbox option. ☒ Include History Search Clear
4.	Click the Search button. Search Clear



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Step	Action
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The **Job Actions Summary** page displays.

Job Actions Summary

JOHN DOE
0 | Policy Planning Spec II
99000 | Research and Planning | Active

Create Job Action

Update/Display Include History

Job Actions Summary

Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group	Tax Location Code	Employee Classification	Employ Type
08/10/2025 0	Active Active Primary Job	Pay Rate Change FY26 Statewide Increase	AA_CARDINAL_BATCH_HR 08/11/2025	Completed	96132 Policy Planning Spec II	ABC01005 Policy Planning Spec II		USA United States	99900 Alcoholic Beverage Control	140732 Research and Planning	10000 ABC Headquarters	ABC VA Alcoholic Bev Control Auth	ABC Alcoholic Beverage Control	SM1 Semimonthly Class (FRITHU07)	085 Hanover	ONC Other Non-Classified	S Salaried
07/19/2024 0	Active Active Primary Job	Position Change Reports To/Supv Change	AA_CARDINAL_BATCH_HR 07/19/2024	Completed	96132 Policy Planning Spec II	ABC01005 Policy Planning Spec II		USA United States	99900 Alcoholic Beverage Control	140732 Research and Planning	10000 ABC Headquarters	ABC VA Alcoholic Bev Control Auth	ABC Alcoholic Beverage Control	SM1 Semimonthly Class (FRITHU07)	085 Hanover	ONC Other Non-Classified	S Salaried
08/10/2024 0	Active Active Primary Job	Pay Rate Change FY25 Statewide Increase	AA_CARDINAL_BATCH_HR 08/17/2024	Completed	96132 Policy Planning Spec II	ABC01005 Policy Planning Spec II		USA United States	99900 Alcoholic Beverage Control	140732 Research and Planning	10000 ABC Headquarters	ABC VA Alcoholic Bev Control Auth	ABC Alcoholic Beverage Control	SM1 Semimonthly Class (FRITHU07)	085 Hanover	ONC Other Non-Classified	S Salaried
12/10/2023 0	Active Active Primary Job	Pay Rate Change FY24 Dec Statewide Increase	AA_CARDINAL_BATCH_HR 12/11/2023	Completed	96132 Policy Planning Spec II	ABC01005 Policy Planning Spec II		USA United States	99900 Alcoholic Beverage Control	140732 Research and Planning	10000 ABC Headquarters	ABC VA Alcoholic Bev Control Auth	ABC Alcoholic Beverage Control	SM1 Semimonthly Class (FRITHU07)	085 Hanover	ONC Other Non-Classified	S Salaried
08/10/2023 0	Active Active Primary Job	Pay Rate Change FY24 Statewide Increase	AA_CARDINAL_BATCH_HR 08/13/2023	Completed	96132 Policy Planning Spec II	ABC01005 Policy Planning Spec II		USA United States	99900 Alcoholic Beverage Control	140732 Research and Planning	10000 ABC Headquarters	ABC VA Alcoholic Bev Control Auth	ABC Alcoholic Beverage Control	SM1 Semimonthly Class (FRITHU07)	085 Hanover	ONC Other Non-Classified	S Salaried

5. Click the **Create Job Action** button to add a new effective dated row.

Create Job Action

The **Create Job Action** page displays in a pop-up window.

Cancel

Create Job Action

Continue

Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.

*Effective Date07/26/2026

Effective Sequence0

*Action

*Reason

Step	Action
6.	The Effective Date field defaults to the current system date. Update this date to the correct date using the Calendar icon. Note: The Effective Sequence field will auto-populate. *Effective Date 07/26/2026  Effective Sequence 0
	Set the termination Effective Date to one day after the employee's last day worked (or last day on payroll). For example, if the employee's last day worked is 07/25/2026, the termination Effective Date should be 07/26/2026. For further information on effective dating, see the Job Aid titled HR351 Overview of Effective Dating located on the Cardinal website in Job Aids under Learning.
7.	Click the Action field dropdown button and select "TER" ("Termination"). *Action TER  Termination
8.	Click the Reason field dropdown button and select "XFO" ("Transfer Out"). *Reason XFO  Transfer Out
9.	Click the Continue button. 



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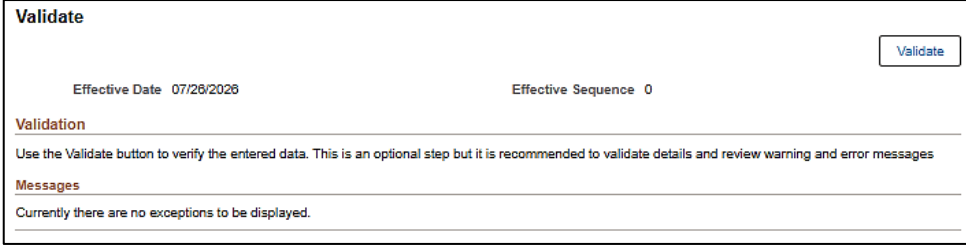
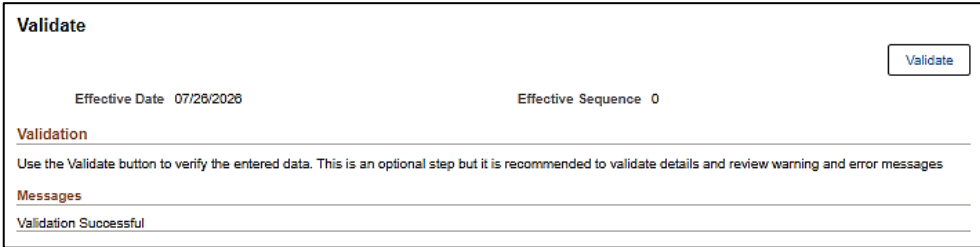
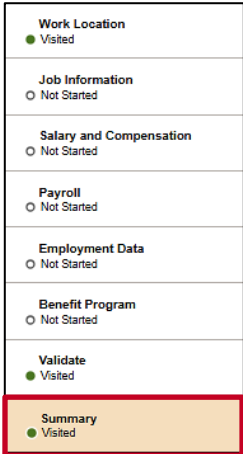
HR351 Managing an Inter-Agency Transfer

Step	Action
	The Work Location page displays. Termination - Transfer Out JOHN DOE 0 Policy Planning Spec II 99000 Research and Planning Active Next > Work Location ● Visited Job Information ○ Not Started Salary and Compensation ○ Not Started Payroll ○ Not Started Employment Data ○ Not Started Benefit Program ○ Not Started Validate ○ Not Started Summary ○ Not Started Work Location Effective Date 07/25/2025 HR Status Inactive *Job Indicator Primary Job Effective Sequence 0 Payroll Status Terminated Position Number ABC01005 Policy Planning Spec II Position Entry Date 12/10/2022 Regulatory Region USA United States Business Unit 99000 Alcoholic Beverage Control Department 140732 Research and Planning Location 10000 ABC Headquarters Date Created 08/04/2025 Override Details Position Managed Record No Company ABC Alcoholic Beverage Control Department Entry Date 12/25/2009 Establishment ID ABC VA Alcoholic Bev Control Auth Last Start Date 12/25/2009 Termination Date 07/25/2026 Override Last Date Worked Last Date Worked 07/25/2025 STD Claim Number Layoff Notice Date Recall Eligibility Flag Turn Off Auto Pay Leave With Pay Working ○ Yes ○ Yes
10.	After selecting the Action and Reason codes, the HR Status and Payroll Status fields automatically update. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Terminated”. HR Status Inactive Payroll Status Terminated
11.	Click the Validate tab. Work Location ● Visited Job Information ○ Not Started Salary and Compensation ○ Not Started Payroll ○ Not Started Employment Data ○ Not Started Benefit Program ○ Not Started Validate ● Visited Summary ○ Not Started



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Step	Action
	The Validate page displays. 
12.	Click the Validate button. 
	The Validation page refreshes with a Messages section. 
13.	Review the Messages section. Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting (the Messages section will display an Error message and the validation will fail). Select the Proceed with warning checkbox option if applicable.
14.	Click the Summary tab. 



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Step

Action

The **Summary** page displays.

< Previous

Submit

Summary

Effective Date 07/26/2026

Effective Sequence 0

Summary of Changes

Field Label	Proposed Information	Current Information
Position Number	ABC01005	ABC01005
HR Status ●	Inactive	Active
Payroll Status ●	Terminated	Active
Termination Date ●	07/25/2026	Not Available
Last Date Worked ●	07/25/2026	Not Available
Changes Made ●		

15.

Review the **Summary of Changes** section, and then click the **Submit** button.

< Previous

Submit

The **Submit Confirmation** page displays.

Submit Confirmation

✔ The Termination for JOHN DOE has been successfully created.

JOHN DOE

0 | Policy Planning Spec II

99900 | Research and Planning | Terminated

For entering or updating ACA related details go to Job Actions Summary and select the related action ACA Eligibility Details.

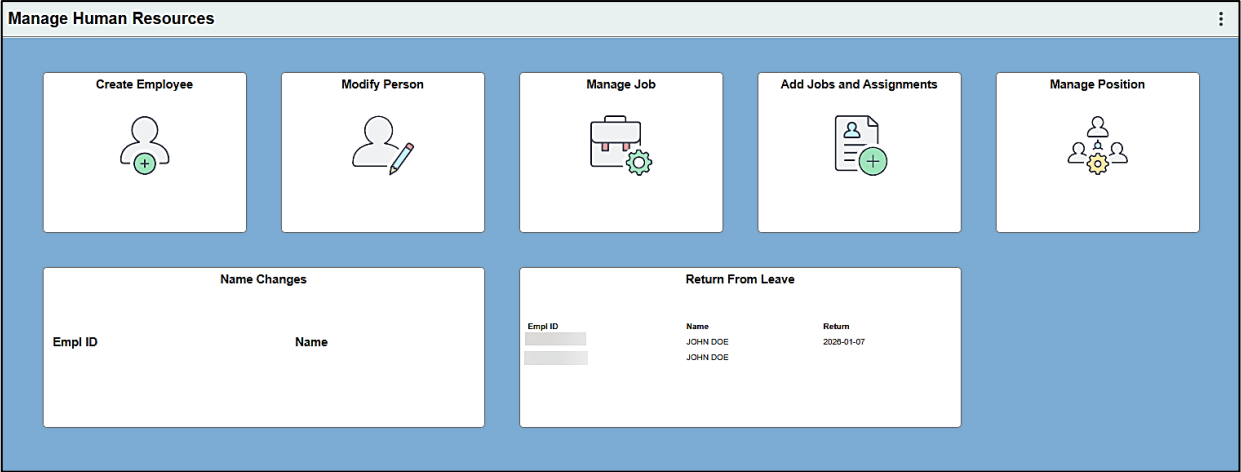
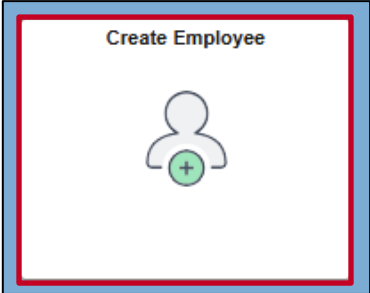
Job Actions Summary

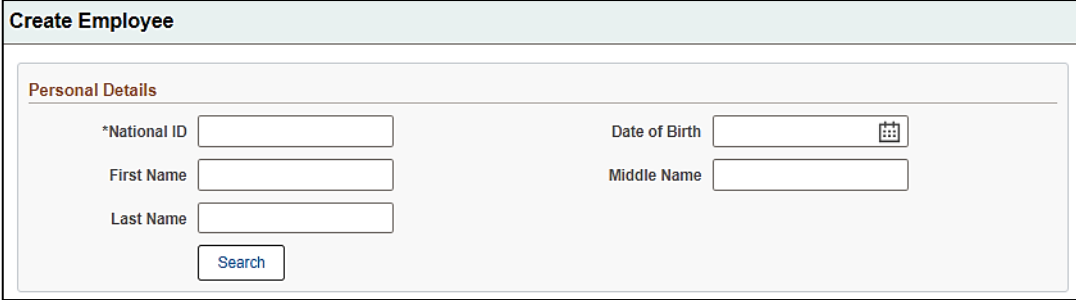
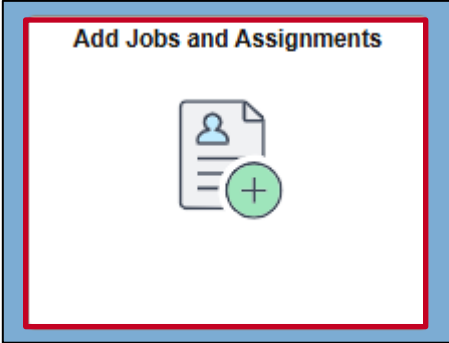
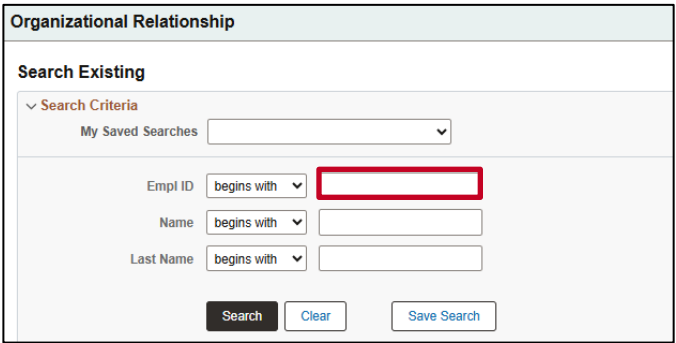
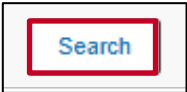
Go To Search Results

Receiving Agency Tasks

Reviewing the Organizational Relationship page

The Receiving Agency must review the **Organizational Relationship** page to ensure the Sending Agency has processed the termination transaction to transfer the employee out of their Agency.

Step	Action
1.	Navigate to the Organizational Relationship page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
2.	Click the Create Employee tile. 

Step	Action
	The Create Employee Search page displays. 
	Users can also search from the Add Jobs and Assignments tile, and entering the employee's Employee ID.   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.
3.	Enter the employee's SSN in the National ID field. 
4.	Click the Search button. 



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Step

Action

The **Create Employee** page redisplay with an Information Message and the **Potential duplicates** section displayed.

Create Employee

Personal Details

*National ID

Date of Birth

First Name

Middle Name

Last Name

Search

Potential duplicates found. Modify the duplicate person or create a new Employee record.

Create Employee

Potential duplicates

Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name	
	05/02/1968	United States	Social Security Number		JOHN	DOE	Organizational Relationship edit next

5.

Click the **Organizational Relationship** link.

Create Employee

Potential duplicates

Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name	
	05/02/1968	United States	Social Security Number		JOHN	DOE	Organizational Relationship edit next

The **Organizational Relationship** page displays.

Organizational Relationship

JOHN DOE

Add Organizational Relationship

Relationship - Employee

Instance Nbr 0

HR Status Inactive

Payroll Status Terminated

Last Hire Date 12/25/2009

Termination Date 07/25/2026

Assignments

Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	
0	Home	07/26/2026	99900	140732	Inactive	12/25/2009	
Primary Job			Alcoholic Beverage Control	Research and Planning	Terminated	07/25/2026	Manage Job

All active and inactive assignments for the employee will display on this page.

Step	Action																					
6.	Review the information and validate that it is consistent with the information obtained from the Sending Agency. If the information is not consistent, contact the Sending Agency and/or employee. At a minimum, the following information should be reviewed: a. Name and Employee ID fields: The Name and Employee ID are displayed at the top of the page. Confirm this is the correct information. b. HR Status field: Should be "Inactive". If it is "Active", contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction. c. Payroll Status field: Should be "Terminated". If the status is not "Terminated", contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction. d. Effective Date field: Should match the agreed upon effective date. Organizational Relationship JOHN DOE Add Organizational Relationship Relationship - Employee Instance Nbr 0 HR Status InactivePayroll Status Terminated Last Hire Date 12/25/2009Termination Date 07/25/2026 Assignments <table><tr><th>Employment Record / Job Indicator</th><th>Home/Host</th><th>Effective Date</th><th>Business Unit</th><th>Department</th><th>HR Status / Payroll Status</th><th>Start Date / Termination Date</th></tr><tr><td>0</td><td></td><td>07/26/2026</td><td>99900</td><td>140732</td><td>Inactive</td><td>12/25/2009</td></tr><tr><td>Primary Job</td><td>Home</td><td></td><td>Alcoholic Beverage Control</td><td>Research and Planning</td><td>Terminated</td><td>07/25/2026Manage Job</td></tr></table>	Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	0		07/26/2026	99900	140732	Inactive	12/25/2009	Primary Job	Home		Alcoholic Beverage Control	Research and Planning	Terminated	07/25/2026Manage Job
Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date																
0		07/26/2026	99900	140732	Inactive	12/25/2009																
Primary Job	Home		Alcoholic Beverage Control	Research and Planning	Terminated	07/25/2026Manage Job																
i	The Sending and Receiving Agencies MUST coordinate the effective date of termination and hire/rehire to prevent a break in service. To evaluate the impact of a possible break in service, see the Job Aid titled HR351 Managing Service Dates and Breaks in Service located on the Cardinal website in Job Aids under Learning.																					
7.	If it is determined on the Organizational Relationship page that the employee was previously employed by the Receiving Agency and is being hired back as the same type of employee (e.g., Wage to Wage or Salary to Salary), click the Manage Job link to create a new job action. This hires the employee back into the same Employee Record they previously held. Follow the instructions in the Job Aid titled HR351 Completing a Rehire located on the Cardinal website in Job Aids under Learning. Otherwise, continue to Step 8 on the next page to add an organizational relationship. Organizational Relationship JONATHAN DOE Add Employee Relationship Relationship - Employee Instance Nbr 0 HR Status InactivePayroll Status Terminated Last Hire Date 06/25/2022Termination Date 08/22/2025 Assignments <table><tr><th>Employment Record / Job Indicator</th><th>Home/Host</th><th>Effective Date</th><th>Business Unit</th><th>Department</th><th>HR Status / Payroll Status</th><th>Start Date / Termination Date</th></tr><tr><td>0</td><td></td><td>08/23/2025</td><td>18100</td><td>18100</td><td>Inactive</td><td>06/25/2022</td></tr><tr><td>Primary Job</td><td>Home</td><td></td><td>Dept of Labor and Industry</td><td>DEPT OF LABOR AND INDUSTRY</td><td>Terminated</td><td>08/22/2025Manage Job</td></tr></table>	Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	0		08/23/2025	18100	18100	Inactive	06/25/2022	Primary Job	Home		Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Terminated	08/22/2025Manage Job
Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date																
0		08/23/2025	18100	18100	Inactive	06/25/2022																
Primary Job	Home		Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Terminated	08/22/2025Manage Job																



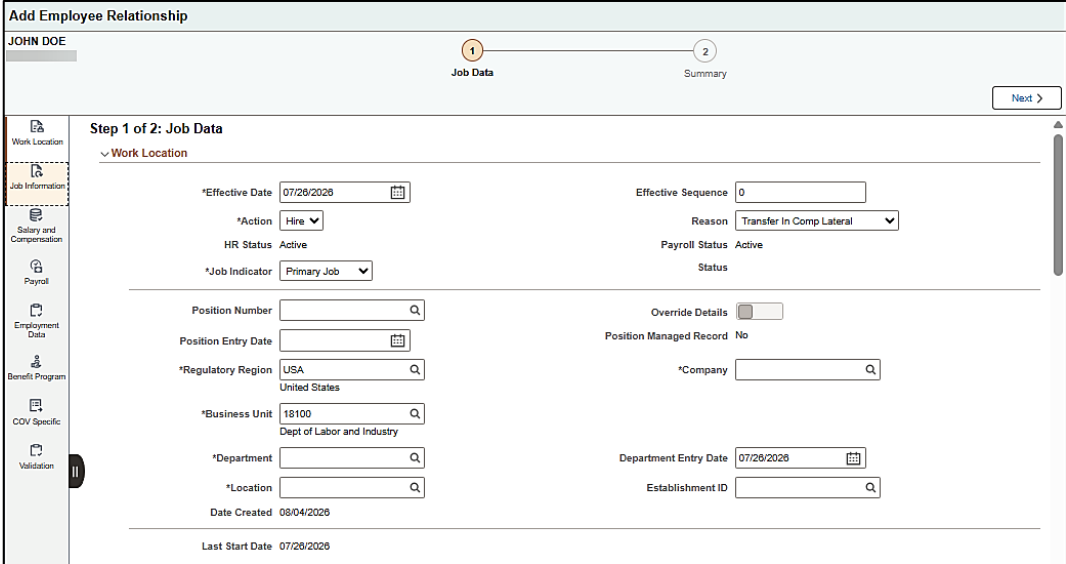
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Adding an Organizational Relationship

Validate that the position information is correct prior to adding an organizational relationship to the employee's Job Data. If the Position Data is incorrect, cancel the action and make corrections to the position before assigning the employee to the position.

Step	Action																					
8.	Click the Add Employee Relationship button. Organizational Relationship JOHN DOE Add Employee Relationship Relationship - Employee Instance Nbr 0 HR Status Inactive Payroll Status Terminated Last Hire Date 11/01/1991 Termination Date 07/25/2026 Assignments <table><tr><th>Employment Record / Job Indicator</th><th>Home/Host</th><th>Effective Date</th><th>Business Unit</th><th>Department</th><th>HR Status / Payroll Status</th><th>Start Date / Termination Date</th></tr><tr><td>0</td><td>Home</td><td>07/26/2026</td><td>99900</td><td>210504</td><td>Inactive</td><td>11/01/1991</td></tr><tr><td>Primary Job</td><td></td><td></td><td>Alcoholic Beverage Control</td><td>Retail Operations</td><td>Terminated</td><td>07/25/2026</td></tr></table> Manage Job	Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	0	Home	07/26/2026	99900	210504	Inactive	11/01/1991	Primary Job			Alcoholic Beverage Control	Retail Operations	Terminated	07/25/2026
Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date																
0	Home	07/26/2026	99900	210504	Inactive	11/01/1991																
Primary Job			Alcoholic Beverage Control	Retail Operations	Terminated	07/25/2026																
	The Add Employee Relationship page displays in a pop-up window. Cancel Add Employee Relationship Continue Empl ID 00208620700 *Effective Date 07/26/2026 Action Hire Action Reason																					
9.	The Effective Date field defaults to the current system date. Update this date to the applicable date of transfer. The Action field defaults to “Hire”. No other options are available. *Effective Date 07/26/2026 Action Hire																					
i	Classified/VPA employees cannot have a break in service between the Termination and Hire/Rehire actions. Refer to DHRM Policy 2.10 Hiring for additional guidance.																					

Step	Action
10.	Click the Reason field drop-down button and select the applicable Transfer In reason. Note: “Transfer In Comp Lateral” has been selected in this example. 
	For further information on valid Action and Reason code combinations, see the Job Aid titled HR351 Action Reason Codes located on the Cardinal website in Job Aids under Learning.
11.	Click the Continue button. 
The Add Employee Relationship (Step 1 of 2: Job Data) page displays with the Work Location tab displayed by default. 	
12.	Enter the employee’s Position Number in the Position Number field. 
	The remaining position related fields on this page will auto-populate once the Position Number is entered. If the Position Data is not correct (this includes verifying whether the position is eligible for telework), cancel the action, and make corrections to the position before assigning the employee to the position. For more information on reviewing 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.



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Step	Action
13.	After verifying the Position Data, click the Job Information tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

The **Job Information** section displays.

Job Information

Supervisor

SOC CD 29-9011

Supervisor Name

DOE, JOHN

Supervisor Posn

DLI00087

Job Code

69034

Compliance/Safety Officer IV

Job Entry Date

07/26/2026

Supervisor Level

E

Employee

Reports To

DLI00087

Regional Safety Director

Reports To Manager

JOHN DOE

View Current Incumbents

Regular/Temporary

Regular

Full/Part

Full-Time

Employee Class

*Officer Code

None

Regular Shift

Not Applicable

Shift Rate

Classified Ind

Classified

Shift Factor

Standard Hours

Standard Hours

40.00

Work Period

Weekly

FTE

1.000000

As of Date

07/26/2026

Adds to FTE Actual Count?

Encumbrance Override

Combined Standard Hours

40.00

FTE

1.000000

> USA



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Step	Action
14.	Review the information within the Job Information section. These values are populated when the Position Number is selected in the Work Location section. If the information is not correct, cancel the action and make corrections to the position before assigning the employee to the position.
15.	Click the Employee 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 located on the Cardinal website in Job Aids under Learning. Employee Class
	The Action/Reason , Employee Class , and Job Code fields are key fields in the VRS file nightly extract from Cardinal to VRS. The VNAV reconciliation will be difficult and time consuming if incorrect data is entered.
16.	The Standard Hours field defaults to “40” for Full-Time status. If the position is Part-Time or Quasi, update the Standard Hours field to reflect the number of hours the employee will be working (e.g., 34, 35, 36, etc.) and tab out of the field. Standard Hours 40.00
17.	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.
The USA section displays. ▼ USA FLSA Status Nonexempt ▼ Work Day Hours *EEO Class None of the Above ▼	
18.	Review the USA section for accuracy. Note: The FLSA Status defaults from the Position Data. If updates are needed, they must be made on the Manage Position page. The EEO Class and Work Day Hours fields are not utilized at this time.



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Step	Action
19.	Click the Salary and Compensation tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

The **Salary and Compensation** section displays.

Salary and Compensation

Salary Plan

Salary Admin Plan SW
Statewide

Grade 5
Statewide Salary Grade 5

Step

Includes Wage Progression Rule ☐

Grade Entry Date 07/26/2026

Step Entry Date

Compensation

Compensation Rate 0.000000 USD

*Frequency Annual

Comparative Information

Change Amount 0.000000 USD

Frequency Annual

Change Percent 0.000

Comparison Ratio

Pay Rates

Annual USD

Daily USD

Monthly USD

Hourly USD

Default Pay Components

Pay Components

No Pay Components exists.

Add Pay Component

Calculate Compensation



Human Resources Job Aid

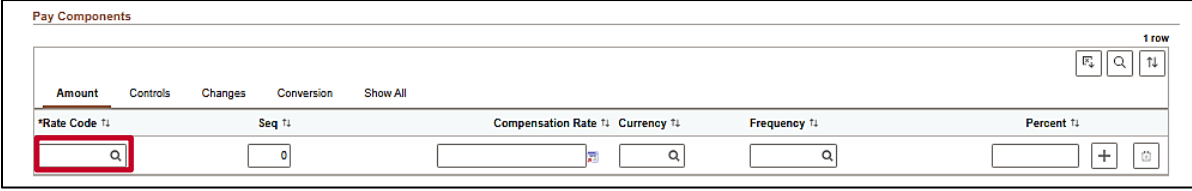
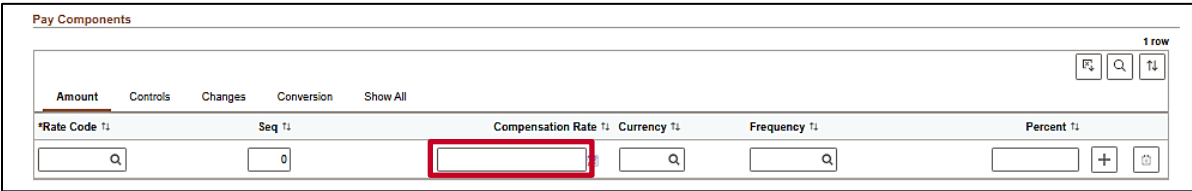
HR351 Managing an Inter-Agency Transfer

Step	Action
20.	Review the Salary Plan section for accuracy. Note: This information comes from the position. Salary Plan Salary Admin Plan SW Statewide Grade 5 Statewide Salary Grade 5 Step Includes Wage Progression Rule ☐ Grade Entry Date 07/26/2026 Step Entry Date
i	The Includes Wage Progression Rule toggle field is not utilized in Cardinal. Do not update. Includes Wage Progression Rule ☐
i	If the Salary Plan information is incorrect, cancel the action and make corrections to the Position before assigning the employee to the Position. The Salary Admin Plan/Grade may change for the employee if this action is a promotion or demotion. For further information on updating Position Data, see the Job Aid titled HR351 Managing Position Data. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
21.	In the Compensation section, click the Frequency dropdown button and select the employee’s pay frequency (“Semimonthly”, “Hourly”, “Biweekly”, etc.). Compensation Compensation Rate 0.000000 *Frequency Semimonthly Comparative Information Change Amount 0.000000 USD Frequency Semimonthly Change Percent 0.000 Comparison Ratio
22.	Click the Default Pay Components button. Default Pay Components
The Pay Components section displays. Pay Components Amount Controls Changes Conversion Show All *Rate Code Seq Compensation Rate Currency Frequency Percent 0 +	



Human Resources Job Aid

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Step	Action
23.	Click the Rate Code Look up icon and select the applicable Rate Code. 
24.	Enter the compensation to pay the employee (Annual Salary or Hourly Rate) in the Comp Rate field. 
	The Currency will always be “USD” and the Frequency field defaults based on the Rate Code selected. Do not update these fields.
	If multiple Rate Codes need to be entered, click the Add a New Row icon (+) and repeat Steps 22-23. 
25.	Click the Calculate Compensation button. 



Human Resources Job Aid

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Step	Action
------	--------

The **Pay Components** section refreshes, and the applicable compensation fields above populate.

Compensation

Compensation Rate 2,500.000000

*Frequency Semimonthly

> Comparative Information

> Pay Rates

Default Pay Components

Pay Components

1 row

Amount Controls Changes Conversion Show All

*Rate Code	Seq	Compensation Rate	Currency	Frequency	Percent
STATE	0	60,000.000000	USD	A	

Calculate Compensation

26. Click the **Payroll** tab.

Work Location

Job Information

Salary and Compensation

Payroll

Employment Data

Benefit Program

Validate

Summary

The **Payroll** section displays.

Payroll

*Payroll System Payroll for North America

Absence System Other

Payroll for North America

Pay Group

Employee Type

Holiday Schedule

Tax Location Code

GL Pay Type

FICA Status Subject

Combination Code

Edit ChartFields



Human Resources Job Aid

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Step	Action
	The Payroll System field defaults to “Payroll for North America”. Do not change. *Payroll System Payroll for North America ▼
27.	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”. Absence System Other ▼ Absence System Absence Management ▼
28.	Click the Pay Group Look up icon within the Payroll for North America section and select the applicable Pay Group for the employee. Payroll for North America Pay Group 🔍 The Payroll section refreshes once the Pay Group is selected. ▼ Payroll *Payroll System Payroll for North America ▼ Absence System Absence Management ▼ Payroll for North America Pay Group SM1 🔍 Semimonthly Class (SATFRI07) Employee Type S 🔍 Salaried Holiday Schedule HOLSAL 🔍 Sal.HolSch Tax Location Code 🔍 GL Pay Type 🔍 FICA Status Subject ▼ Combination Code 🔍 Absence Management System Pay Group SM1 🔍 Semi-monthly Classified Eligibility Group 🔍 Exchange Rate Type 🔍 Use Rate As Of ▼ Setting Use Pay Group Eligibility ☒ Use Pay Group Rate Type ☒ Use Pay Group As Of Date ☒
29.	Click the Tax Location Code Look up icon and select the applicable code based on the location of the employee’s office. Tax Location Code 🔍

Step	Action
	Updates made to the Tax Location Code will update the Tax Data pages in the Payroll module.
30.	The FICA Status field defaults to “Subject” for regular Social Security and Medicare tax withholdings. Update as needed based upon the following guidance: • Select “Exempt” if the employee is exempt from both Social Security and Medicare tax withholdings • Select “Medicare only” if the employee is only subject to Medicare tax withholdings FICA Status Subject ▼
31.	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. ▼ Payroll *Payroll System Payroll for North America ▼ <u>Payroll for North America</u> Pay Group SM1 Q Semimonthly Class (SATFRI07) Employee Type S Q Salaried Tax Location Code Q GL Pay Type Edit ChartFields Absence System Absence Management ▼ Holiday Schedule HOLSAL Q Sal.HolSch FICA Status Subject ▼ Combination Code <u>Absence Management System</u> Pay Group SM1 Q Semi-monthly Classified Exchange Rate Type Q Eligibility Group Q Use Rate As Of ▼ <u>Setting</u> Use Pay Group Eligibility ☒ Use Pay Group As Of Date ☒ Use Pay Group Rate Type ☒
32.	Click the Eligibility Group Look up icon and select the applicable Eligibility Group for the employee. Eligibility Group Q
	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.



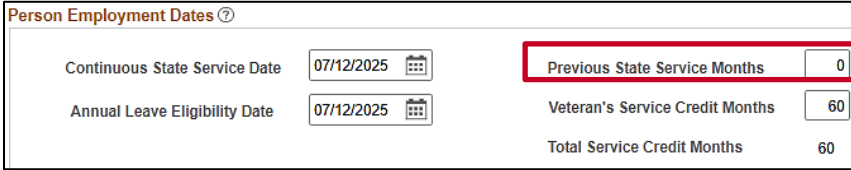
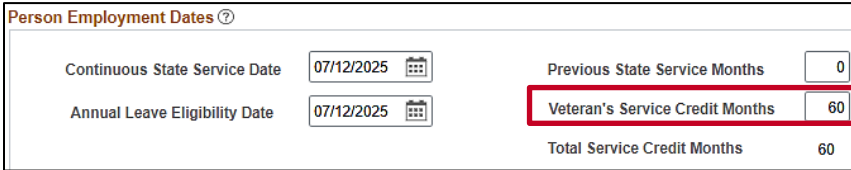
Human Resources Job Aid

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Step	Action
33.	The Use Pay Group Eligibility field toggle is selected by default. De-select this toggle. Setting Use Pay Group Eligibility ☐ Use Pay Group Rate Type ☒ Use Pay Group As Of Date ☒
34.	Click the Employment Data tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation
The Employment Data section displays. ▼ Employment Data Organizational Instance Instance Record 1 Original Start Date 07/26/2026 ☐ Override First Start Date Last Start Date Termination Date Org Instance Service Date 07/26/2026 ☐ Override 0 Years 0 Months 0 Days Organizational Assignment Data Instance Record Last Assignment Start 07/26/2026 First Assignment Start 07/26/2026 Assignment End Date Company Seniority Date 07/26/2026 Benefits Service Date 07/26/2026 0 Years 0 Months 0 Days 0 Years 0 Months 0 Days Probation Date VSDP Sick/PER Leave Effrt Date 12/25/2009 Continuous State Service Date 12/25/2009 Annual Leave Eligibility Date 12/25/2009 *Employee Eligible for Telework? Employee Eligible for Telework ☐ Alternate Leave Plan VSDP Enroll Date 12/25/2009 Agency Use Field 1 Agency Use Field 2 Agency Use Field 3 Previous State Service Months 0 Veteran's Service Credit Months 0 Total Service Credit Months 0 Tenure Status/Contract Type Alternate Work Schedule ☐	

Step	Action
	The Instance Record field will reflect the new employee record number for the employee. Employment Data Organizational Instance Instance Record 1 Original Start Date 07/26/2026 ☐ Override First Start Date Last Start Date Termination Date Org Instance Service Date 07/26/2026 ☐ Override
35.	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. Probation Date 
36.	Review the populated fields in the Organizational Assignment Data section for accuracy and update as needed. Organizational Assignment Data Instance Record Last Assignment Start 07/26/2026 First Assignment Start 07/26/2026 Assignment End Date Company Seniority Date 07/26/2026 Benefits Service Date 07/26/2026 0 Years 0 Months 0 Days 0 Years 0 Months 0 Days Probation Date  VSDP Sick/PER Leave Effrt Date 12/25/2009  Continuous State Service Date 12/25/2009  Annual Leave Eligibility Date 12/25/2009  *Employee Eligible for Telework? Employee Eligible for Telework v Tenure Status/Contract Type v Alternate Leave Plan Alternate Work Schedule ☐ VSDP Enroll Date 12/25/2009  Previous State Service Months 0 Veteran's Service Credit Months 0 Total Service Credit Months 0
37.	Select the applicable value for the Employee Eligible for Telework? field using the dropdown button provided. *Employee Eligible for Telework? Employee Eligible for Telework v
	For further information on selecting telework options, see the Job Aid titled HR351 Managing Employee Teleworker Data located on the Cardinal website in Job Aids under Learning.

Step	Action
	If the Agency does not use Cardinal Absence Management, the Alternate Leave Plan field must be completed based on the employee's leave plan (e.g., VSDP Elig Group) in order for the employee to have a complete Total Compensation statement in Cardinal Employee Self-Service (ESS). If the Agency does not use Cardinal Absence Management or ESS/Total Compensation Statement, the COV system of record (Cardinal) must still incorporate the employee's leave plan. Therefore, this field must be completed. Alternate Leave Plan
38.	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. *Employee Eligible for Telework? ☐ Employee Eligible for Telework Alternate Leave Plan ☐ Alternate Work Schedule VSDP Enroll Date 07/12/2025
39.	Enter the original hire date in the Continuous State Service Date field. This field is used to determine eligibility for legislative pay increases for all salaried employees, as well as severance, benefits at layoff for VPA covered employees (if applicable). Person Employment Dates ? Continuous State Service Date 07/12/2025 Annual Leave Eligibility Date 07/12/2025 Previous State Service Months 0 Veteran's Service Credit Months 60 Total Service Credit Months 60
40.	Enter the original hire date in the Annual Leave Eligibility Date field. This field must be updated for all VPA covered employees and salaried employees for Agencies that use Cardinal's Absence Management and auto populates the Company Seniority Date field. Person Employment Dates ? Continuous State Service Date 07/12/2025 Annual Leave Eligibility Date 07/12/2025 Previous State Service Months 0 Veteran's Service Credit Months 60 Total Service Credit Months 60
	If a correction is needed for the Annual Leave Eligibility Date, use the Action / Reason combination of DTA / LED and then enter the correct date. For further information on Action Reasons, refer to the Job Aid titled HR351 Action Reason Codes. This Job Aid can be found on the Cardinal website in Job Aids under Learning.

Step	Action
41.	Enter the service months in the Previous State Service Months field. This field is used when there is a break in service (Rehires only).  The screenshot shows the 'Person Employment Dates' form. It includes fields for 'Continuous State Service Date' (07/12/2025), 'Annual Leave Eligibility Date' (07/12/2025), 'Previous State Service Months' (0), 'Veteran's Service Credit Months' (60), and 'Total Service Credit Months' (60). The 'Previous State Service Months' field is highlighted with a red box.
	For further information on breaks in service, 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 Job Aids under Learning.
42.	Enter the months of veteran's service in the Veteran's Service Credit Months field if applicable.  The screenshot shows the 'Person Employment Dates' form. It includes fields for 'Continuous State Service Date' (07/12/2025), 'Annual Leave Eligibility Date' (07/12/2025), 'Previous State Service Months' (0), 'Veteran's Service Credit Months' (60), and 'Total Service Credit Months' (60). The 'Veteran's Service Credit Months' field is highlighted with a red box.
	The annual leave accrual is determined by using state service and veteran's service in the military, National Guard, or Reserves. When entering Veteran's Service Credit Months, Agencies must also populate the Annual Eligibility Date field. Failing to do so will result in a delivered PeopleSoft Error code upon save. The Total Service Credit Months field is a read only field. It auto-populates 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. 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.



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Step	Action
43.	Click the Benefit Program tab. Work Location Visited Job Information Visited Salary and Compensation Visited Payroll Visited Employment Data Visited Benefit Program Visited Validate Not Started Summary Not Started

The **Benefit Program** section displays.

Benefit Program

Benefit Record Number 0

*Benefits System Benefits Administration

Benefits Employee Status

Annual Benefits Base Rate USD

Enter or update the ACA Eligibility details from the related actions in Job Actions Summary.

Benefits Administration Eligibility

BAS Group ID

Eligible Field 1

Eligible Field 3

Eligible Field 5

Eligible Field 7

Eligible Field 9

Eligible Field 2

Eligible Field 4

Eligible Field 6

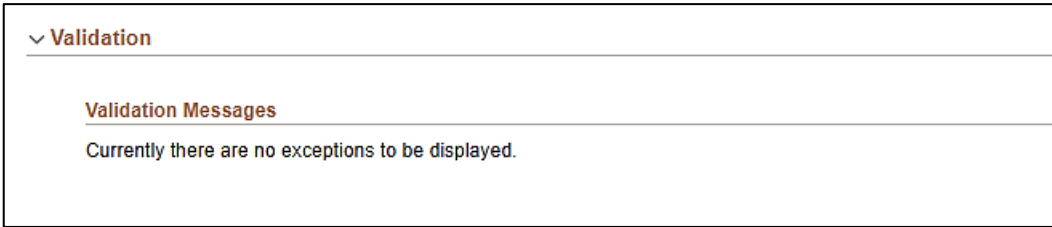
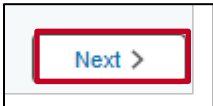
Eligible Field 8

Benefit Program Participation Details

1 row

Effective Date 1:	Benefit Program 1:	Currency Code 1:
12/25/2009	SAL	USD

Step	Action
44.	Review the Benefits Administration Eligibility section. The eligibility fields will default from the previous row of Job Data. Update Eligibility Fields 2, 3, 8, and 9 as needed using the following information: • Eligible Field 2 – update to 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). • Eligible Field 3 – update as needed: select “Y” when time is entered by the employee or select “N” when time is entered by a Timekeeper or time is interfaced. Eligible Field 3 should only be completed for PY/TA agencies. Otherwise, Eligible Field 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. • Eligible Field 8 – update as needed: select the applicable pay frequency (e.g., salaried is “12-24” and hourly is “12-26”). • Eligible Field 9 – update as needed: select the applicable value. These values represent the nature of the employee and how the employee health premiums are paid. Select the breakdown of how the benefits payment will be split between the employee (EE) and the employer (ER). Benefits Administration Eligibility BAS Group ID OEC OE State Eligible Field 1 HBY0050 Eligible Field 3 Y Eligible Field 5 Eligible Field 7 Eligible Field 9 SF-GB Eligible Field 2 181001000 Eligible Field 4 Eligible Field 6 30181 Eligible Field 8 12-24
45.	Review the Benefits Program Participation Details section and validate it for accuracy. Benefit Program Participation Details Effective Date 1 Benefit Program 1 Currency Code 1 12/25/2009 SAL Salaried Employee Benefit Pgm USD
i	For further information on the Eligibility Configuration valid values, refer to the Job Aid titled BN361 Overview of the Eligibility Configuration Fields located on the Cardinal website in Job Aids under Learning.

Step	Action
46.	Click the Validation tab. 
	The Validation section displays. 
47.	Click the Next button. 



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Step	Action								
48.	Review the Validation Messages section and click the Next button. Next > Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting (the Validation Messages section will display an Error message and the validation will fail). Select the Proceed with warning checkbox option if applicable and click the Next button again. Validation Validation Messages Validation failed 3 rows <table><thead><tr><th>Message Severity</th><th>Message Text</th></tr></thead><tbody><tr><td>1 Warning</td><td>Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.</td></tr><tr><td>2 Warning</td><td>Warning -- Compensation Frequency has been updated. (1010,264)</td></tr><tr><td>3 Error</td><td>Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)</td></tr></tbody></table> Validation Messages ☒ Proceed with warning Validation Successful with warnings	Message Severity	Message Text	1 Warning	Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.	2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)	3 Error	Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)
Message Severity	Message Text								
1 Warning	Warning -- Update Elig fields 2, 8, 9 (Health, Contract/Pays, Status/Code) and revalidate.								
2 Warning	Warning -- Compensation Frequency has been updated. (1010,264)								
3 Error	Eligibility Group is a required field when Pay System is PNA or PI and using Absence Management. (1000,1361)								

The **Summary of Changes** page displays.

Add Employee Relationship

JOHN DOE

1

Job Data

2

Summary

< Previous

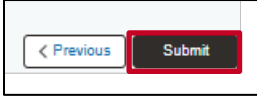
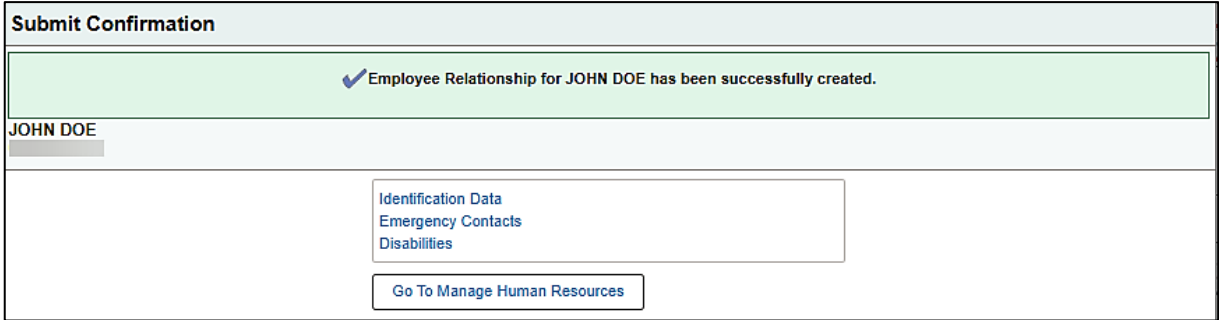
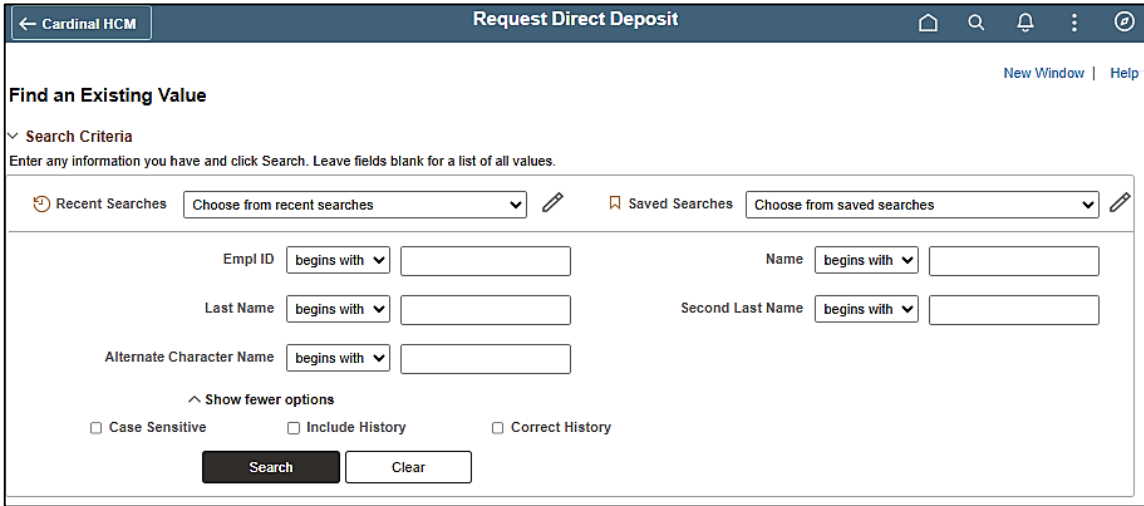
Submit

Step 2 of 2: Summary

Summary of Changes

Job Data

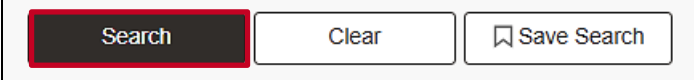
Field Label	Proposed Information
Position Number	DLU0000-Safety Compliance Officer Sr
Company	DLI-Dept of Labor and Industry
Business Unit	18100-Dept of Labor and Industry
Department	18100-DEPT OF LABOR AND INDUSTRY
Location	HENR-HENRICO REGIONAL OFFICE
Establishment ID	DOLI-Dept of Labor and Industry
Job Code	69034- Compliance/Safety Officer IV
Reports To	DLU00007-Regional Safety Director
Reports To Manager	JOHN DOE
Supervisor Level	E-Employee

Step	Action
49.	Review the Summary of Changes section, and then click the Submit button. 
The Submit Confirmation page displays. 	
50.	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
The Request Direct Deposit Find an Existing Value 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.

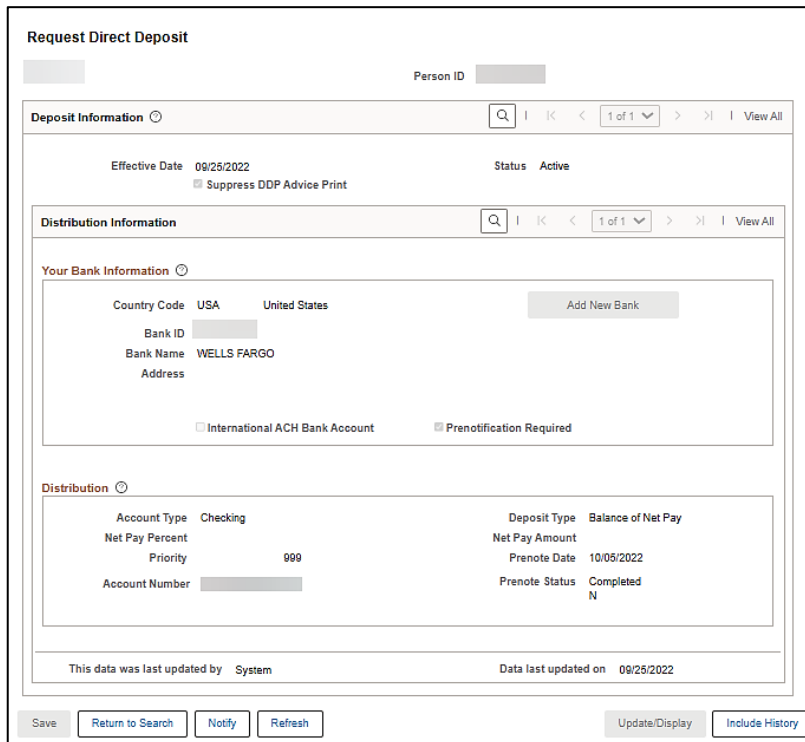


Human Resources Job Aid

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Step	Action
51.	Enter the employee's Employee's ID in the Empl ID field. 
52.	Click the Search button. 

The **Request Direct Deposit** page displays for the employee.





Human Resources Job Aid

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Step	Action
53.	Confirm the previous Direct Deposit information is accurate based upon the employee's paperwork. The screenshot displays the 'Request Direct Deposit' interface in the Cardinal system. It includes a 'Person ID' field, 'Effective Date' (03/10/2024), and 'Status' (Active). The 'Distribution Information' section is highlighted with a red box, showing fields for 'Your Bank Information' (Country Code: USA, Bank ID, Bank Name: WELLS FARGO, Address) and 'Distribution' (Account Type: Checking, Net Pay Percent, Priority: 000, Account Number, Deposit Type, Net Pay Amount, Prenote Date, Prenote Status: Not Submid, Balance of Net Pay). The bottom of the form indicates 'This data was last updated by: Online User' and 'Data last updated on: 03/12/2024'.
54.	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 certification.
55.	Continue to the Agency Next Steps After Entering the Inter-Agency Transfer section of this Job Aid.

Agency Next Steps After Entering the Inter-Agency Transfer

Be sure to enter/review the employee's citizenship and the employee's personal data, and add a telework agreement if one has been established/approved.

- For further information on entering citizenship information and updating personal data and telework, see the Job Aids titled **HR351 Viewing and Modifying Personal Data** and **HR351 Managing Employee Teleworker Data** located 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** located on the Cardinal website in **Reports Catalogs** under **Resources**.

Communicate with the employee to update/review state and federal withholding forms, direct deposit elections, etc. per established business practices. If the tax withholding paper 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.

Receiving Agency Benefits Administrator - Review the transferring employee's information to ensure the transfer is done correctly and with as little disruption to the employee as possible.

Coordinate with Agency Time and Labor (TL) Administrators to ensure that all employees are assigned the applicable Work Schedule (can be assigned by either a TL Administrator or the employee's supervisor), review their TA eligibilities (e.g., overtime, comp leave, etc.) and leave balance for possible adjustments.

- For further information on assigning Work Schedules and entering balance adjustments, see the Job Aids titled **TA Maintaining Employee Work Schedules** and **TA374 Managing Balance Adjustments** located on the Cardinal website in **Job Aids** under **Learning**