



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, the HR Administrator should 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 an 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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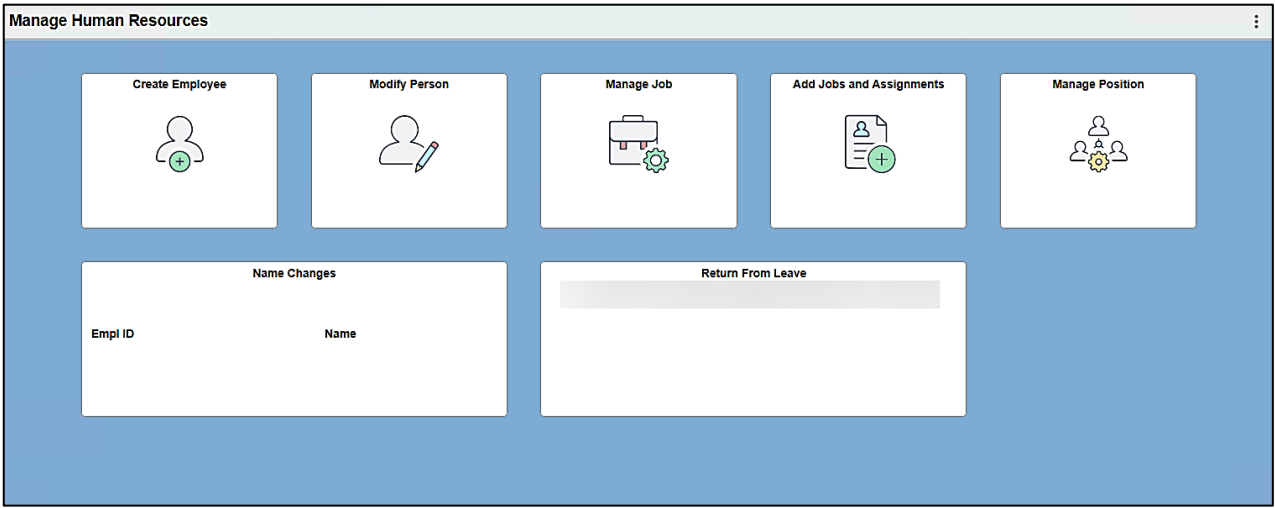
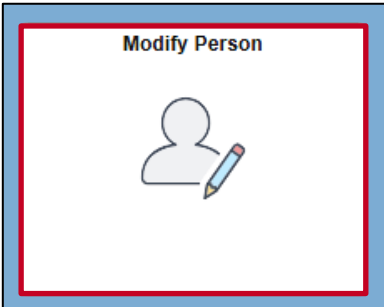
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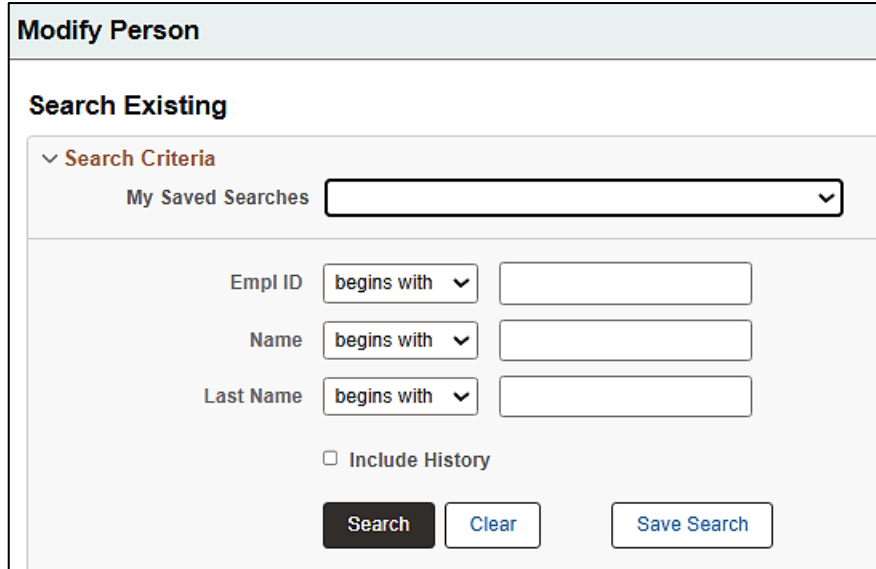
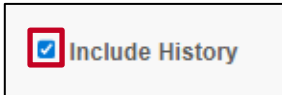
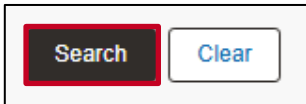
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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/12/2026	Note added referencing the Job Aid BN361 Linking Dependents and Retirees.
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. Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Navigating to the Modify Person Page

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

Step	Action
	The Modify Person Search Existing 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.
3.	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. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. 
4.	Select the Include History checkbox option. 
5.	Click the Search button. 



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Step	Action																				
	The Modify Person page displays, Step 1 of 2: Person Data, with the Person Details tab displayed by default. Modify Person 1 Person Data 2 Summary Next > Person Details Contact Information Regional VA Person Info Validation Step 1 of 2: Person Data Person Details Names + <table><thead><tr><th>Format Type</th><th>Effective Date</th><th>Display Name</th><th>Formal Name</th></tr></thead><tbody><tr><td>English</td><td>09/23/2022</td><td></td><td></td></tr><tr><td>CURRENT</td><td></td><td></td><td></td></tr><tr><td>English</td><td>10/10/2017</td><td></td><td></td></tr><tr><td>HISTORY</td><td></td><td></td><td></td></tr></tbody></table> Personal Information *Date of Birth Birth Country Birth Location Date of Death USA United States Birth State Exclude Contact Information? Biographical Details + Effective Date Gender Highest Education Level Marital Status	Format Type	Effective Date	Display Name	Formal Name	English	09/23/2022			CURRENT				English	10/10/2017			HISTORY			
Format Type	Effective Date	Display Name	Formal Name																		
English	09/23/2022																				
CURRENT																					
English	10/10/2017																				
HISTORY																					

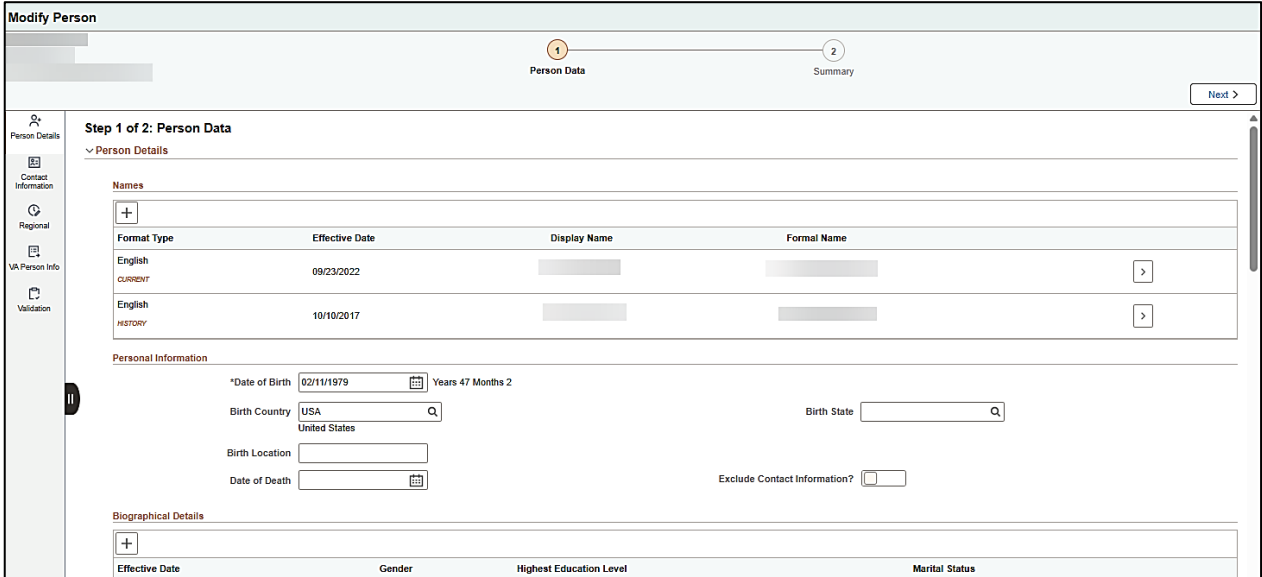


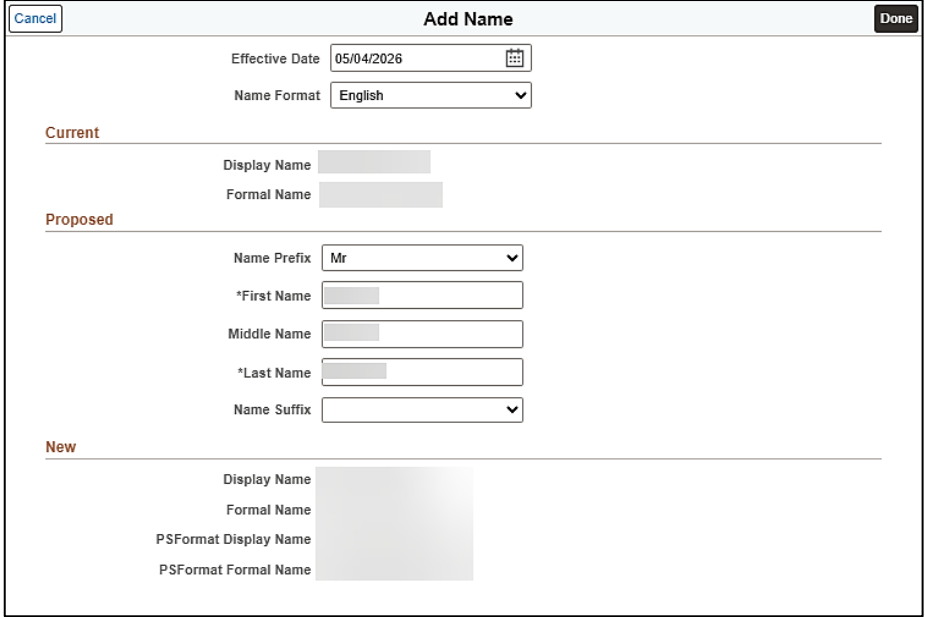
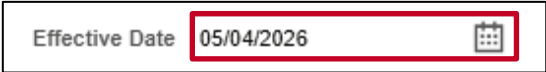
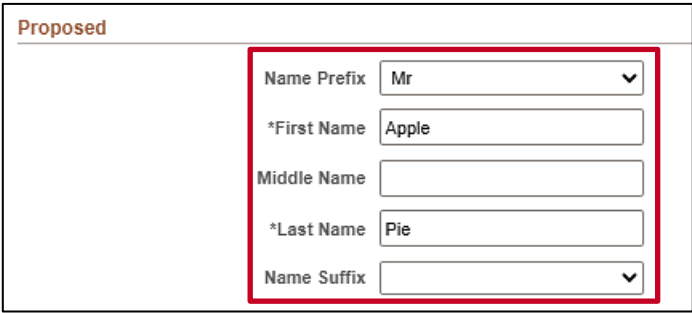
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Updating Name

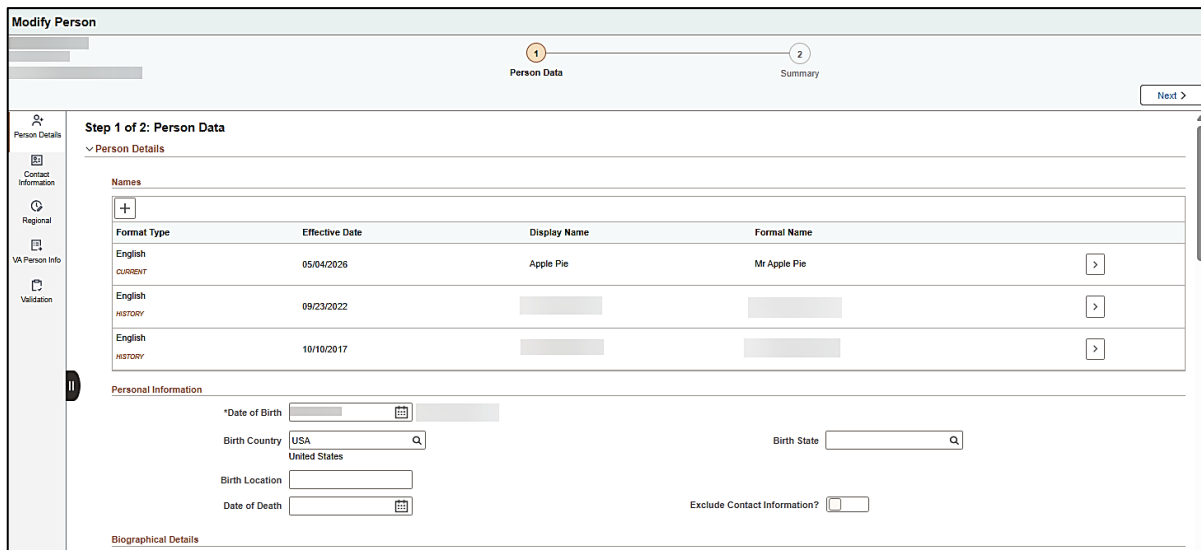
To update an employee's name, users must first navigate to the **Modify Person** page by following the instructions in the [Navigating to the Modify Person Page](#) section of this Job Aid.

Step	Action
	The Modify Person page displays, Step 1 of 2: Person Data, with the Person Details tab displayed by default. 
1.	Click the Add (+) icon in the Names section to add a new effective dated row. 

Step	Action
	The Add Name page displays in a pop-up window. 
2.	Click the Effective Date Calendar icon and update the effective date of the name change as needed. 
	The effective date of the proposed 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. For more information pertaining to effective dating, see the Job Aid titled HR351 Overview of Effective Dating located on the Cardinal website in Job Aids under Learning.
3.	Make the applicable updates in the Proposed section. 

Step	Action
	Do not add a period behind the middle initial. Do not include suffixes (Jr, Sr, or IV) in the Last Name field. Do not use special characters in any of the Proposed name fields. Note: Copying and pasting from Word or Excel may create special characters which will not be accepted by healthcare vendor systems.
4.	Click the Done button. 

The **Modify Person** page **Person Details** tab, **Step 1 of 2: Person Data**, redispays.



Modify Person

1 Person Data 2 Summary

Next >

Step 1 of 2: Person Data

Person Details

Names

Format Type	Effective Date	Display Name	Formal Name
English CURRENT	05/04/2026	Apple Pie	Mr Apple Pie
English HISTORY	09/23/2022		
English HISTORY	10/10/2017		

Personal Information

*Date of Birth

Birth Country

United States

Birth Location

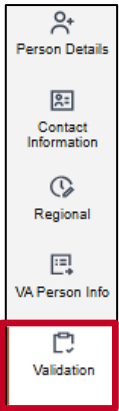
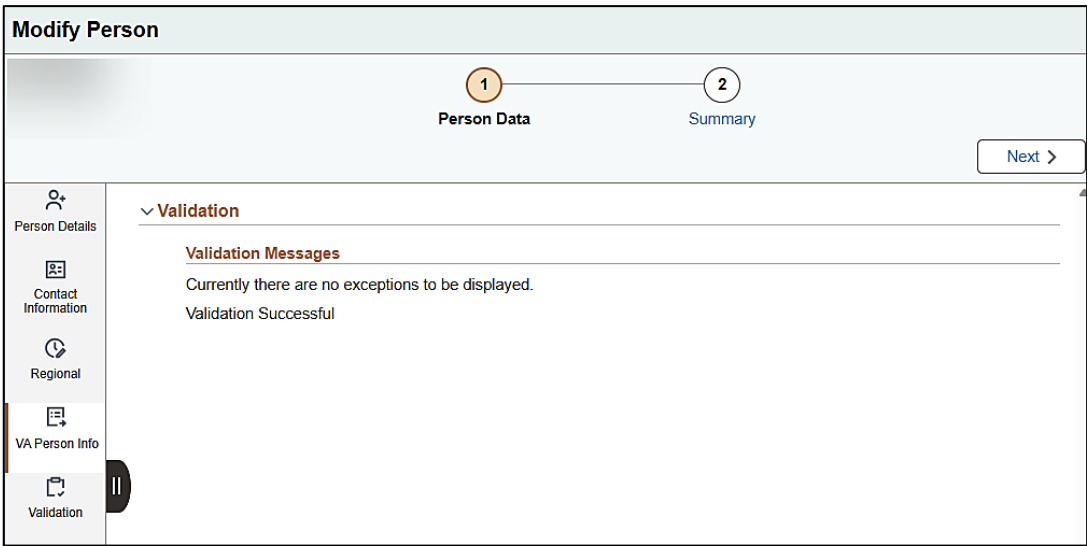
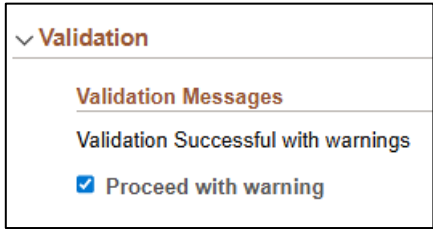
Birth State

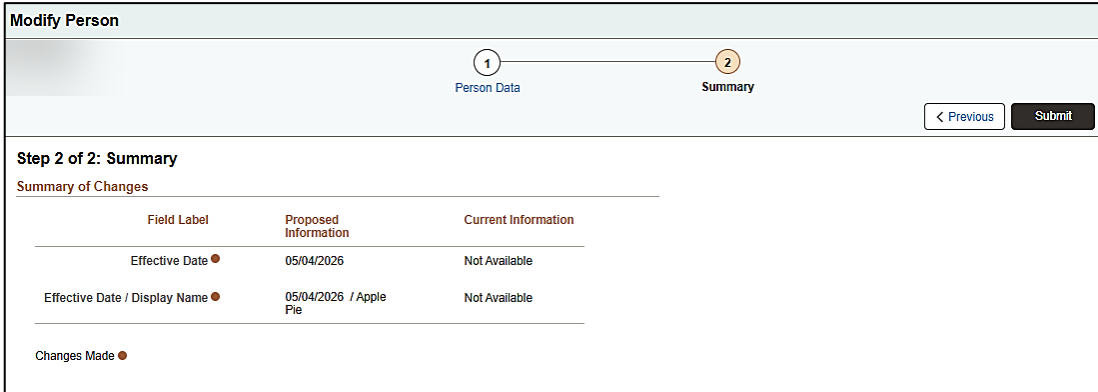
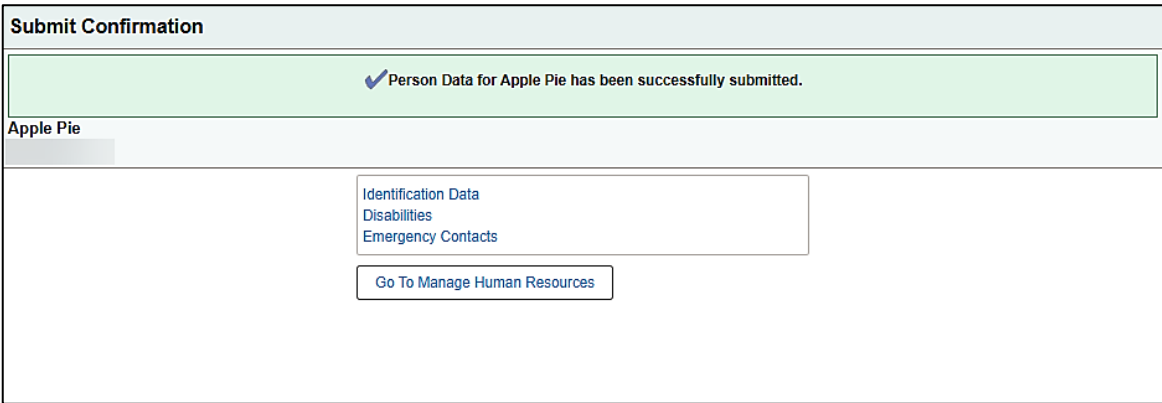
Date of Death

Exclude Contact Information? ☐

Biographical Details

	The updated name will appear in the Name section on the “CURRENT” row with the effective date. The current name will be displayed in the Header section until the changes are submitted. The Personal 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.
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Step	Action
5.	Click the Validation tab once all required updates are made. 
The Validation section of the Modify Person page displays with Validation Messages. 	
	Validation messages may appear that include warnings and errors. If a Validation warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving. 

Step	Action
6.	Click the Next button once all required updates are made. 
The Modify Person Step 2 of 2: Summary page displays. 	
7.	Review the Summary of Changes section and click the Submit button. 
The Submit Confirmation page displays. 	
	From the Submit Confirmation page, users can directly access the Identification Data page to enter citizenship information, the Emergency Contact page to enter emergency contact information, and the Disabilities page to note disabilities by clicking the respective links. These pages will open in a new window. Additionally, there is a Go To Manage Human Resources link to return to the Manage Human Resources homepage.



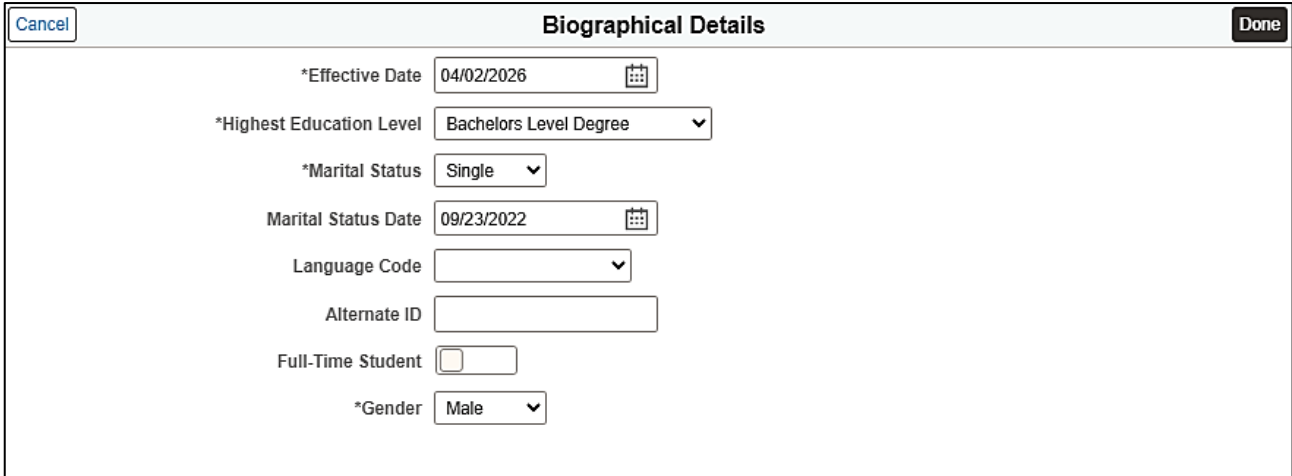
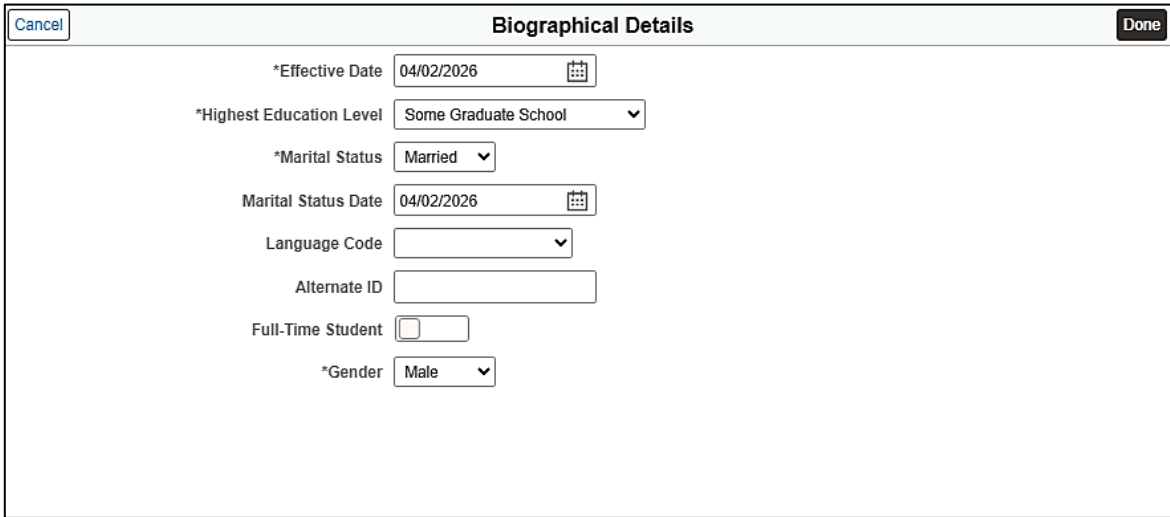
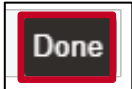
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Updating Biographical History Information – Gender, Highest Education Level, or Marital Status

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

Step	Action
	The Modify Person page displays, Step 1 of 2: Person Data, with the Person Details tab displayed by default.
1.	Scroll down to the Biographical Details section as needed.
2.	Click the Add (+) icon in the Biographical Details section to add a new effective dated row.

Step	Action
	The Biographical Details page displays in a pop-up window. 
3.	The Effective Date field defaults to the current date. Make effective dated changes as needed to the Effective Date, Highest Education Level, Marital Status and/or Gender fields. 
4.	Click the Done button once all applicable updates are made. 



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Step	Action
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The **Step 1 of 2: Person Data Person Details** section redisplay with the **Biographical Details** section updated.

Biographical Details				
+				
Effective Date	Gender	Highest Education Level	Marital Status	
04/02/2026	Male	Some Graduate School	Married	>
CURRENT				
09/23/2022	Male	Bachelors Level Degree	Single	>
HISTORY				
02/25/1999	Male	C-HS Graduate or Equivalent	Single	>
HISTORY				

5. Click the **Validation** tab once all required updates are made.

Person Details

Contact Information

Regional

VA Person Info

Validation

The **Validation** section of the **Modify Person** page displays with Validation Messages (if applicable).

Modify Person

Apple Pie

1 Person Data 2 Summary

Next >

Person Details

Contact Information

Regional

VA Person Info

Validation

Smoker ↑↓ Smoker Status Date ↑↓

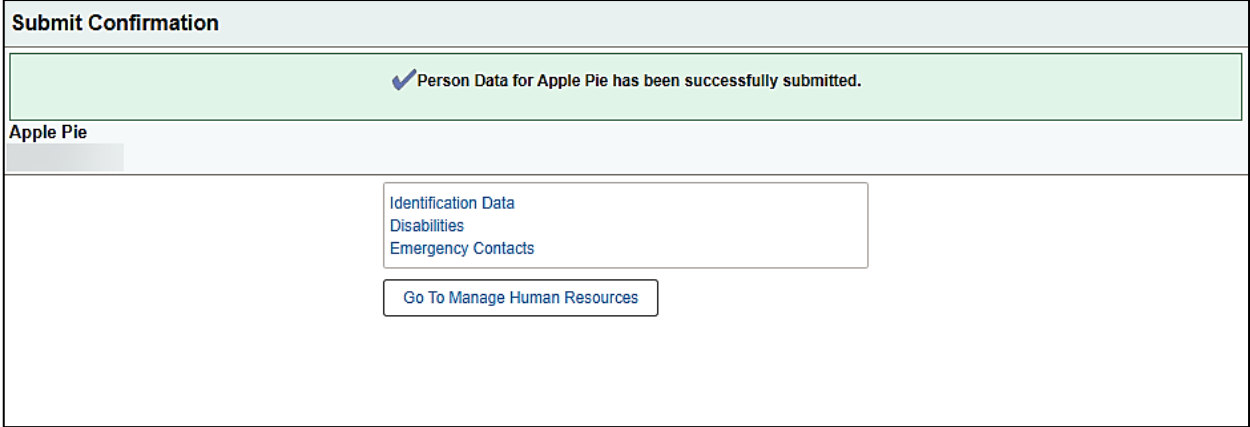
No

> VA Person Info

Validation Messages

Currently there are no exceptions to be displayed.

Step	Action															
	Validation messages may appear that include warnings and errors. If a Validation warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving. Validation Validation Messages Validation Successful with warnings ☒ Proceed with warning															
6.	Click the Next button once all required updates are made. Next >															
The Modify Person Step 2 of 2: Summary page displays. Modify Person Apple Pie 1 2 Person DataSummary < Previous Submit Step 2 of 2: Summary Summary of Changes <table><thead><tr><th>Field Label</th><th>Proposed Information</th><th>Current Information</th></tr></thead><tbody><tr><td>Effective Date</td><td>04/02/2026</td><td>Not Available</td></tr><tr><td>Effective Date / Gender</td><td>04/02/2026 / Male</td><td>Not Available</td></tr><tr><td>Effective Date / Highest Education Level</td><td>04/02/2026 / Some Graduate School</td><td>Not Available</td></tr><tr><td>Effective Date / Marital Status</td><td>04/02/2026 / Married</td><td>Not Available</td></tr></tbody></table> Changes Made		Field Label	Proposed Information	Current Information	Effective Date	04/02/2026	Not Available	Effective Date / Gender	04/02/2026 / Male	Not Available	Effective Date / Highest Education Level	04/02/2026 / Some Graduate School	Not Available	Effective Date / Marital Status	04/02/2026 / Married	Not Available
Field Label	Proposed Information	Current Information														
Effective Date	04/02/2026	Not Available														
Effective Date / Gender	04/02/2026 / Male	Not Available														
Effective Date / Highest Education Level	04/02/2026 / Some Graduate School	Not Available														
Effective Date / Marital Status	04/02/2026 / Married	Not Available														
7.	Review the Summary of Changes section and click the Submit button. < Previous Submit															

Step	Action
	The Submit Confirmation page displays. 
	From the Submit Confirmation page, users can directly access the Identification Data page to enter citizenship information, the Disabilities page to note disabilities, and the Emergency Contact page to enter emergency contact information by clicking the respective links. These pages will open in a new window. Additionally, there is a Go To Manage Human Resources link to return to the Manage Human Resources homepage.

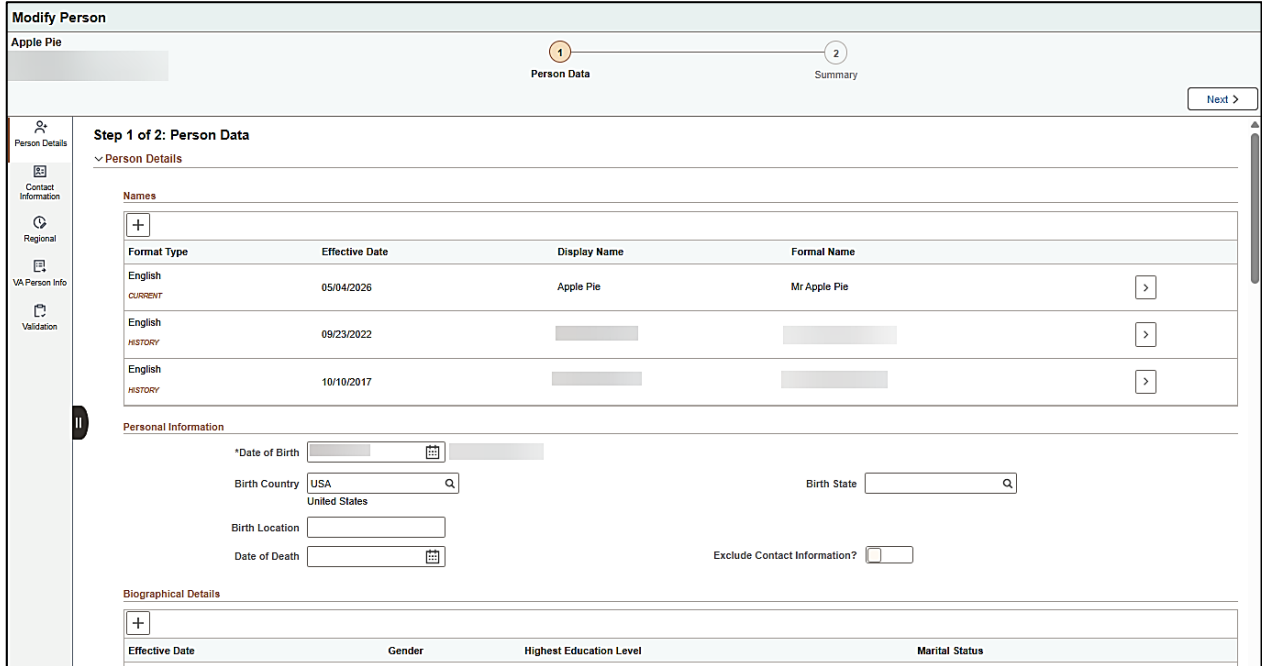
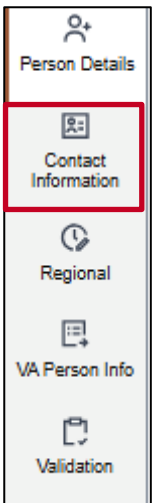


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Updating Contact Information – Address, Phone, or Email Address

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

Step	Action
	The Modify Person page displays, Step 1 of 2: Person Data, with the Person Details tab displayed by default.  The screenshot shows the 'Modify Person' page for 'Apple Pie'. It has a progress bar at the top with 'Person Data' (Step 1) and 'Summary' (Step 2). The sidebar on the left has five tabs: 'Person Details' (selected), 'Contact Information', 'Regional', 'VA Person Info', and 'Validation'. The main content area is titled 'Step 1 of 2: Person Data' and contains a 'Person Details' section with a 'Names' table. The table has columns: 'Format Type', 'Effective Date', 'Display Name', and 'Formal Name'. It lists three entries: 'English CURRENT' (Apple Pie, Mr Apple Pie), 'English HISTORY' (09/23/2022), and 'English HISTORY' (10/10/2017). Below the table are fields for 'Personal Information' (Date of Birth, Birth Country, Birth State, Birth Location, Date of Death) and 'Biographical Details' (Effective Date, Gender, Highest Education Level, Marital Status). A red box highlights the 'Contact Information' tab in the sidebar.
1.	Click the Contact Information tab.  The close-up shows the sidebar tabs: 'Person Details', 'Contact Information' (highlighted with a red box), 'Regional', 'VA Person Info', and 'Validation'.



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Step	Action																																	
	The Contact Information section displays. ▼ Contact Information Addresses Display History ☒ <table border="1"><thead><tr><th>+</th><th>Address Type</th><th>Effective Date</th><th>Address</th><th></th></tr></thead><tbody><tr><td></td><td>Home</td><td>09/23/2022</td><td>100 MAIN ST RICHMOND, VA 99999</td><td>></td></tr><tr><td></td><td>Home</td><td>02/25/1999</td><td>100 MAIN ST RICHMOND, VA 99999</td><td>></td></tr></tbody></table> Phone <table border="1"><thead><tr><th>+</th><th>Type 1↓</th><th>Number 1↓</th><th>Extension 1↓</th><th>Preferred 1↓</th><th></th></tr></thead><tbody><tr><td></td><td>Business</td><td>555/555-5555</td><td>999</td><td>Yes</td><td>></td></tr><tr><td></td><td>Home</td><td>555/555-5555</td><td></td><td>No</td><td>></td></tr></tbody></table> Email Email Option Selection ☒ Agency Provided Email ☐ Pending Agency Provided Email ☐ Employee Provided Email	+	Address Type	Effective Date	Address			Home	09/23/2022	100 MAIN ST RICHMOND, VA 99999	>		Home	02/25/1999	100 MAIN ST RICHMOND, VA 99999	>	+	Type 1↓	Number 1↓	Extension 1↓	Preferred 1↓			Business	555/555-5555	999	Yes	>		Home	555/555-5555		No	>
+	Address Type	Effective Date	Address																															
	Home	09/23/2022	100 MAIN ST RICHMOND, VA 99999	>																														
	Home	02/25/1999	100 MAIN ST RICHMOND, VA 99999	>																														
+	Type 1↓	Number 1↓	Extension 1↓	Preferred 1↓																														
	Business	555/555-5555	999	Yes	>																													
	Home	555/555-5555		No	>																													
2.	Click the Add (+) icon in the Addresses section to update the employee's address. 																																	
	The Add Another Address page displays in a pop-up window. Cancel Add Another Address Done *Address Type *Effective Date 04/02/2026 Country USA *Status Active Address Detail Address 1 Address 2 Address 3 City State Postal County																																	

Step	Action
3.	Click the Address Type dropdown button and select the Address Type to be modified. *Address Type
	An Address Type of “Home” is required for healthcare extract file requirements and must indicate the employee’s physical address for health program eligibility purposes. 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.
4.	The Effective Date defaults to today’s date. Click the Effective Date Calendar icon and update as needed. *Effective Date 04/02/2026 
	The Status field defaults to “Active”. Leave as “Active” unless the Address Type selected will be inactivated. *Status Active
5.	Enter the applicable address information in the Address Detail section. At a minimum, enter the Address 1, City, State, and Postal fields. Address Detail Address 1 Address 2 Address 3 City State Q Postal County
	Do not use periods or special characters in the Address Detail section.
6.	Click the Done button. Done

Step

Action

The **Addresses** section redispays with the updated address information.

Addresses

Display History

☒

+

Address Type	Effective Date	Address	
Home <i>CURRENT</i>	04/02/2026	123 ICE CREAM ST RICHMOND, VA 23219	>
Home <i>HISTORY</i>	09/23/2022	100 MAIN ST RICHMOND, VA 99999	>
Home <i>HISTORY</i>	02/25/1999	100 MAIN ST RICHMOND, VA 99999	>

i

Addresses should remain in Cardinal as history and should never be removed. However, the **Status** field for a Mailing address can be changed to “Inactive”. Follow **Steps 2 – 6** to inactivate a mailing address. Inactive addresses will still display in the **Addresses** section, but will display with a **Status** of “Inactive” when the **Add/Edit Address** (>) icon is clicked.

Note: The Home address should never be inactivated.

Cancel

Add Another Address

Done

*Address Type

Mailing

*Effective Date

07/27/2026

Country

USA

*Status

Inactive

Cancel

Edit Address

Address Type

Mailing

Effective Date

07/27/2026

Country

USA

Status

Inactive

Address Detail

Address 1

PO Box 999

Address 2

Address 3

City

Richmond

State

VA

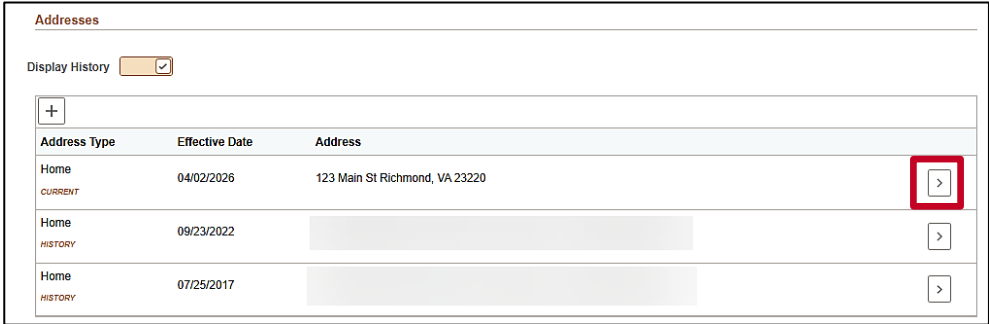
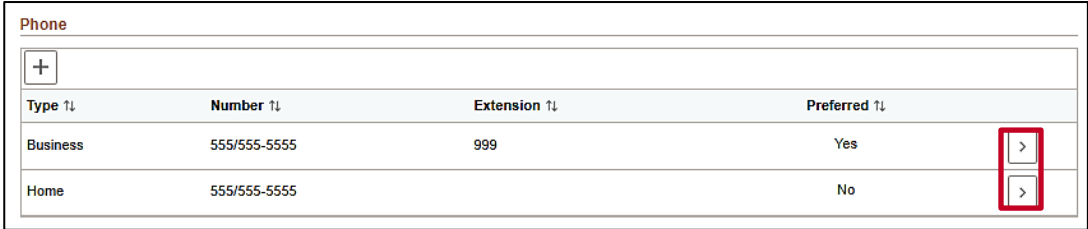
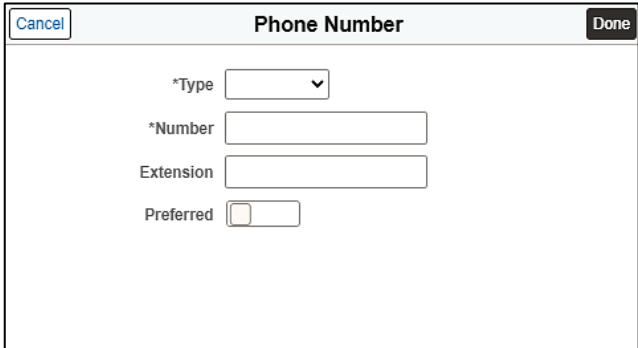
Virginia

Postal

99999

County

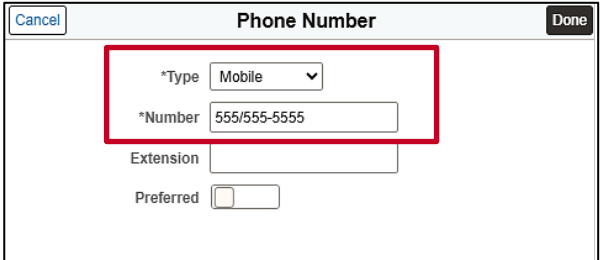
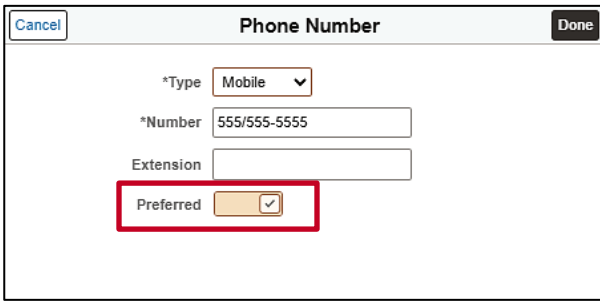
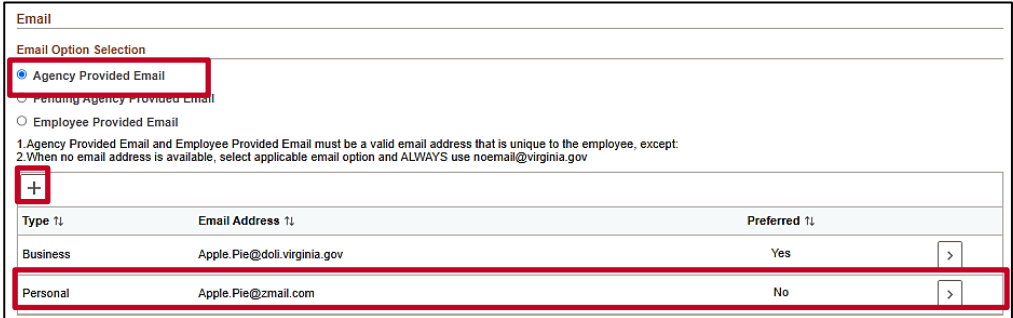
Delete

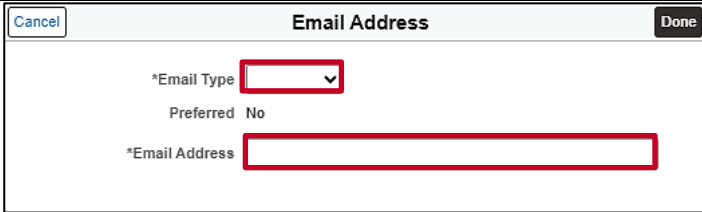
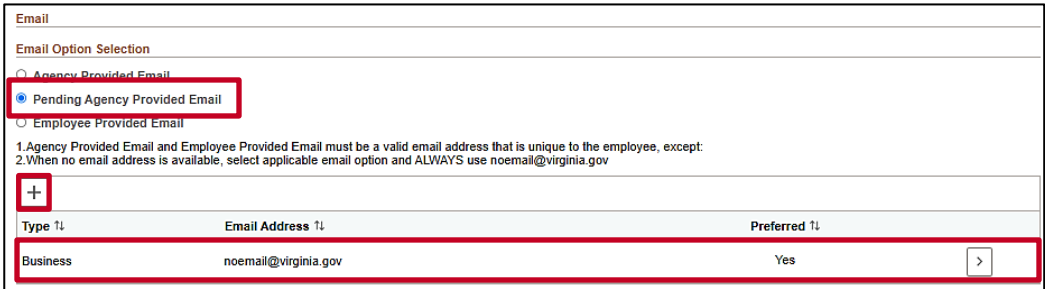
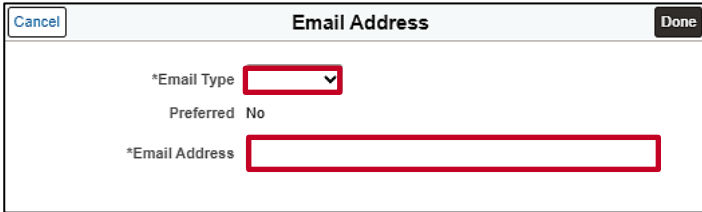
Step	Action
	The Add/Edit Address (>) icon can be clicked to edit or delete an address prior to submitting. However, once the information has been submitted, the address can no longer be edited. A new effective dated address row needs to be created. 
7.	To update a phone number or the preferred phone number for an employee, click the Edit (>) icon by the row of the number to be changed, and update the phone number and Preferred field toggle (no new effective dated row is needed). 
	A preferred phone number must be selected for one of the phone numbers associated with each employee.
8.	Click the Add (+) icon in the Phone section to add a new additional phone number. 
The Phone Number page displays in a pop-up window. 	

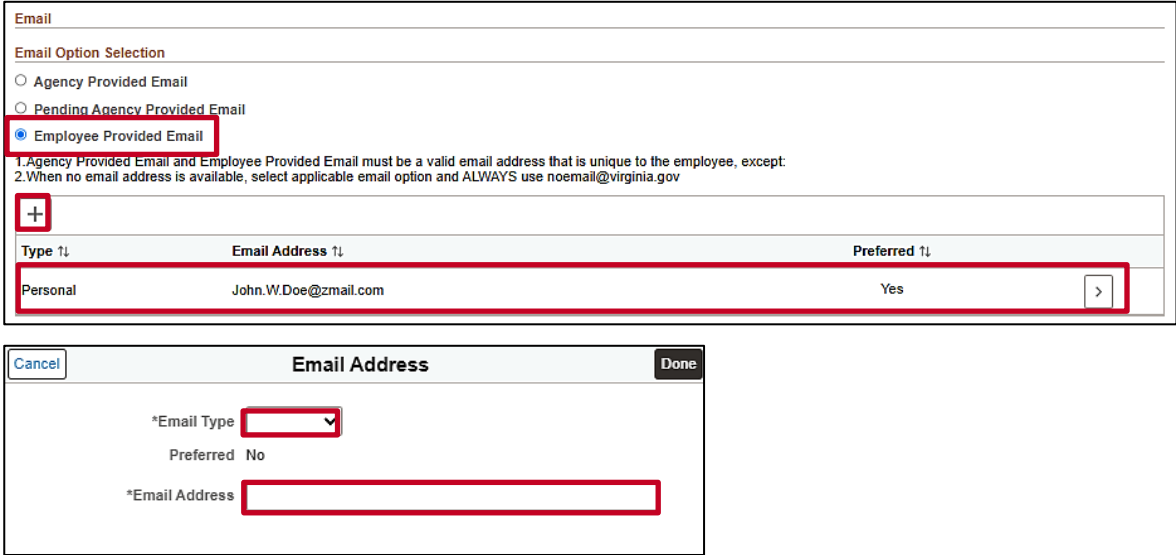
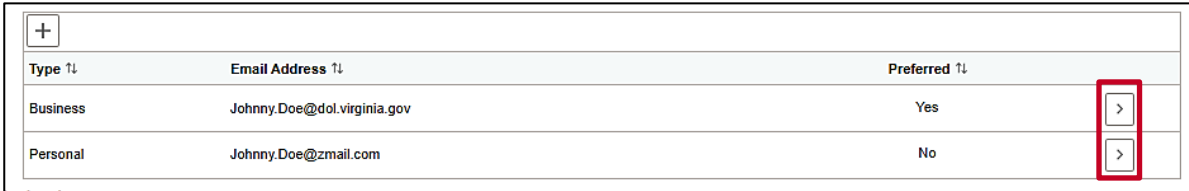
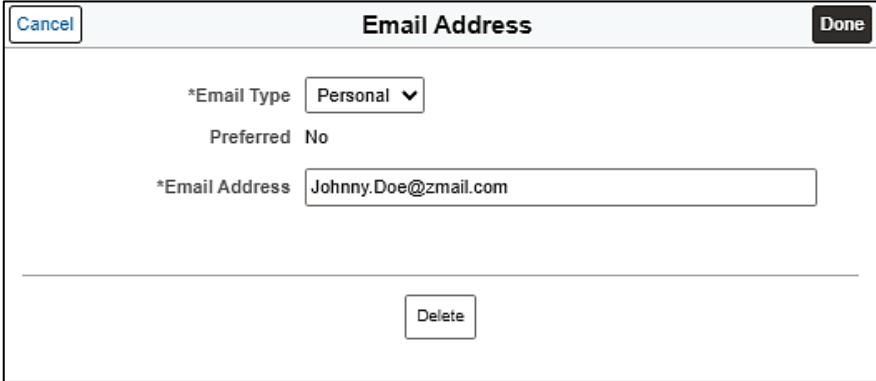


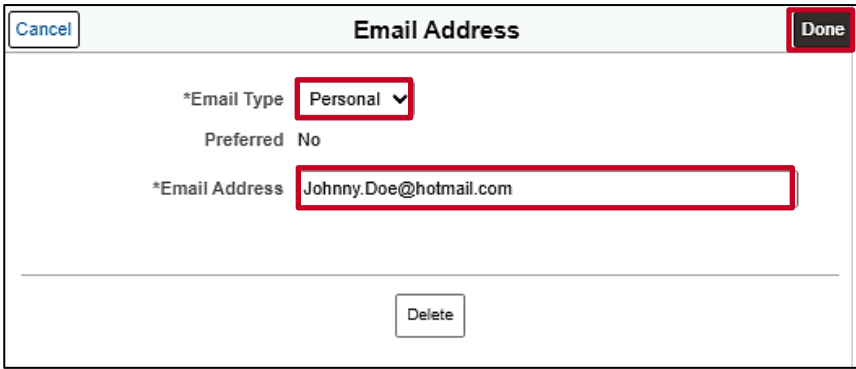
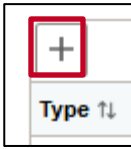
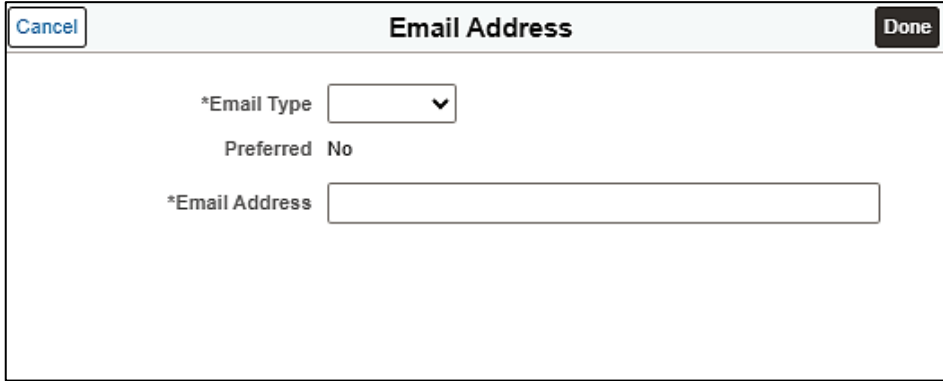
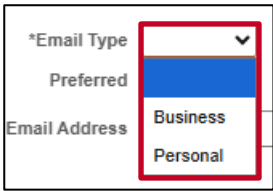
Human Resources Job Aid

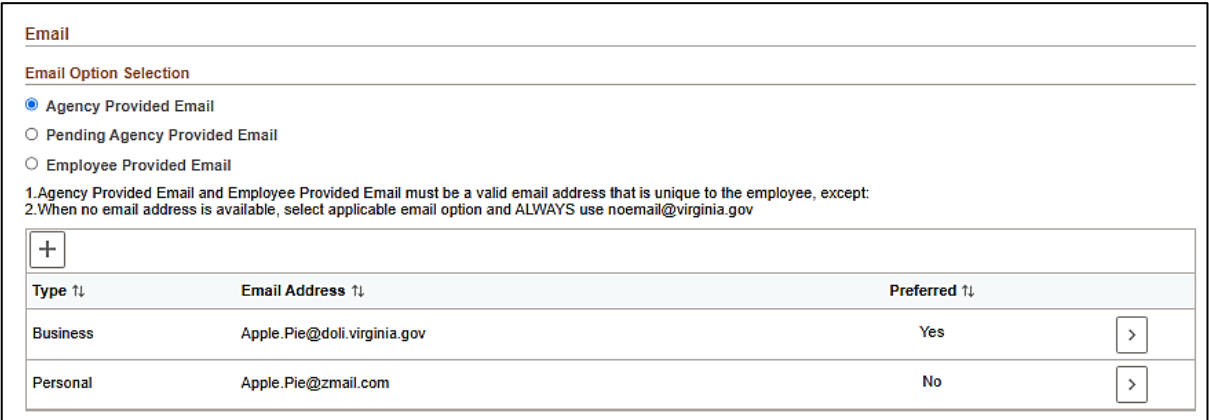
HR351 Viewing and Modifying Personal Data

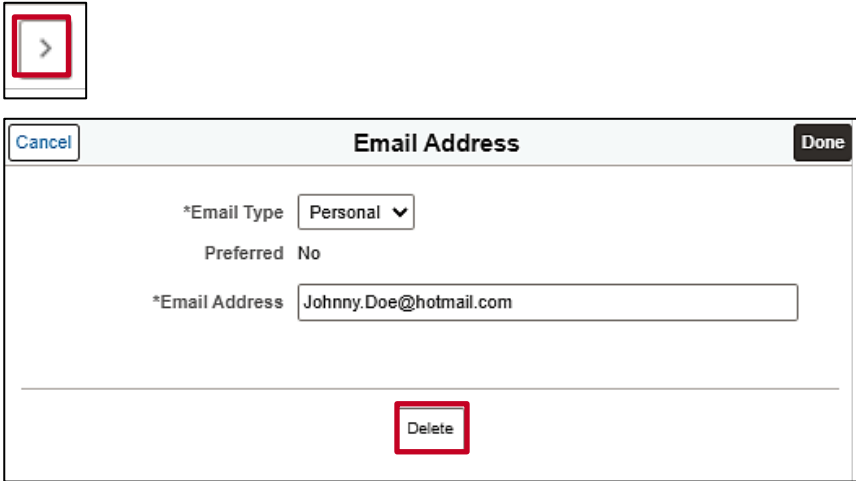
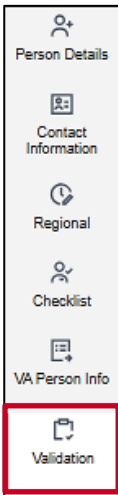
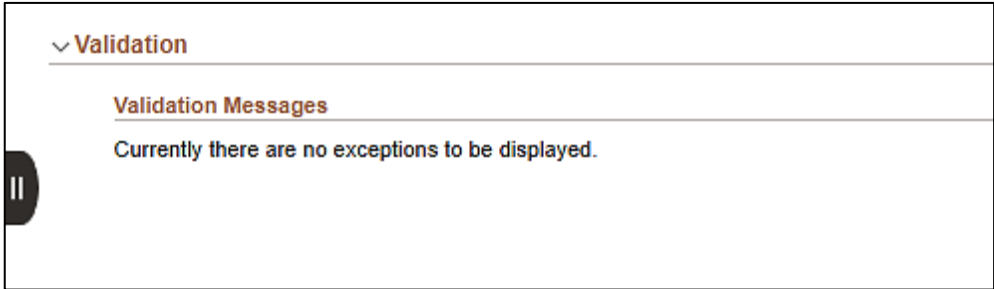
Step	Action
9.	Enter the new additional phone number information. At a minimum, complete the Type and Number fields. 
10.	Click the Preferred field toggle to identify the employee's preferred phone number if applicable. 
11.	To add an email address for the employee, complete these sections based on the following guidelines: - If the employee has been issued a business email: - Click the Agency Provided Email radio button option - Click the Add (+) button - Click the Email Type dropdown button and select "Business" - Enter the email address in the Email Address field - Click the Done button Note: Notify the employee of their email and provide information to register for Cardinal Employee Self-Service using this email. 

Step	Action
	 b. If the employee's business email has been requested, but not yet assigned: - Click the Pending Agency Provided Email radio button option - Click the Add (+) button - Click the Email Type dropdown button and select "Business" - Enter "noemail@virginia.gov" in the Email Address field   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. c. If the employee will not be provided with a business email: - Click the Employee Provided Email radio button option - Click the Add (+) button - Click the Email Type dropdown button and select "Personal" - Enter the email address in the Email Address field

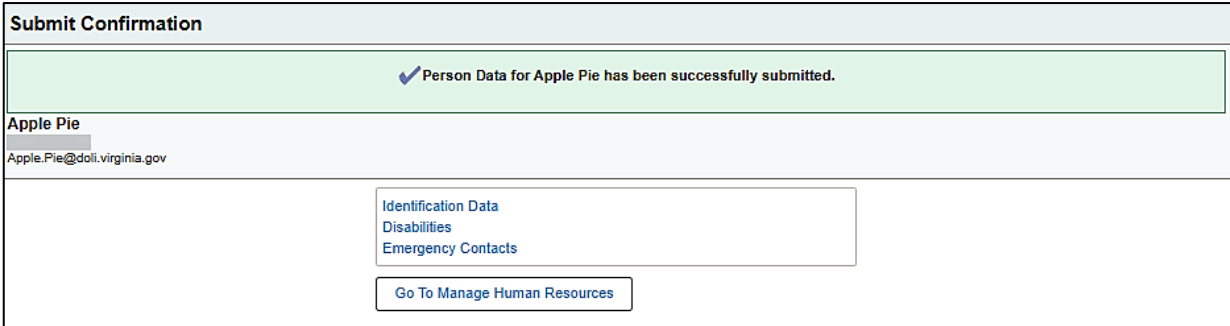
Step	Action
	Note: The employee will use the email provided to register and access the Cardinal Employee Self-Service features. 
	The “Preferred” email status will default to the “Business” email address if listed.
12.	To update an email address for the employee, click the Edit (>) icon at the end of the applicable email address row. 
The Email Address page displays in a pop-up window. 	

Step	Action
13.	Make the applicable updates and click the Done button. 
14.	To add an additional email address for an employee, click the Add (+) icon. 
The Email Address page displays in a pop-up window. 	
15.	Click the Email Type dropdown button and select the applicable email type. 

Step	Action
16.	Enter the email address in the Email Address field. 
17.	Click the Done button. 
The Email section redispays. 	
	More than one type of email address can be entered (e.g., “Personal” and “Business”). However, only one email address can be listed as “Preferred”. If only one email address is listed, this email will default as “Preferred”. If a “Business” email address is listed, this email will default 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
	If an existing email address needs to be deleted, users can click the Edit (>) icon at the end of the applicable email address row, and then click the Delete button. 
18.	Click the Validation tab once all required updates are made. 
The Validation section displays. 	

Step	Action																					
i	Validation messages may appear that include warnings and errors. If a Validation warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving. Validation Validation Messages Validation Successful with warnings ☒ Proceed with warning																					
19.	Click the Next button once all required updates are made. Next >																					
The Modify Person Step 2 of 2: Summary page displays the Summary of Changes. Modify Person Apple Pie 1 Person Data 2 Summary < Previous Submit Step 2 of 2: Summary Summary of Changes <table><thead><tr><th>Field Label</th><th>Proposed Information</th><th>Current Information</th></tr></thead><tbody><tr><td>Address Type</td><td>Home</td><td>Not Available</td></tr><tr><td>Address Type / Effective Date</td><td>Home / 04/02/2026</td><td>Not Available</td></tr><tr><td>Address Type / Address</td><td>Home / 123 Main St Richmond, VA 23220</td><td>Not Available</td></tr><tr><td>Type</td><td>Business</td><td>Business</td></tr><tr><td>Type / Number</td><td>Business / 555/555-5555</td><td>Business / </td></tr><tr><td>Type / Extension</td><td>Not Available</td><td>Business / 473</td></tr></tbody></table> Changes Made		Field Label	Proposed Information	Current Information	Address Type	Home	Not Available	Address Type / Effective Date	Home / 04/02/2026	Not Available	Address Type / Address	Home / 123 Main St Richmond, VA 23220	Not Available	Type	Business	Business	Type / Number	Business / 555/555-5555	Business /	Type / Extension	Not Available	Business / 473
Field Label	Proposed Information	Current Information																				
Address Type	Home	Not Available																				
Address Type / Effective Date	Home / 04/02/2026	Not Available																				
Address Type / Address	Home / 123 Main St Richmond, VA 23220	Not Available																				
Type	Business	Business																				
Type / Number	Business / 555/555-5555	Business /																				
Type / Extension	Not Available	Business / 473																				
20.	Click the Submit button. < Previous Submit																					

Step	Action
	The Submit Confirmation page displays. 
	From the Submit Confirmation page, users can directly access the Identification Data page to enter citizenship information, the Disabilities page to note disabilities, and the Emergency Contact page to enter emergency contact information by clicking the respective links. These pages will open in a new window. Additionally, there is a Go To Manage Human Resources link to return to the Manage Human Resources homepage.



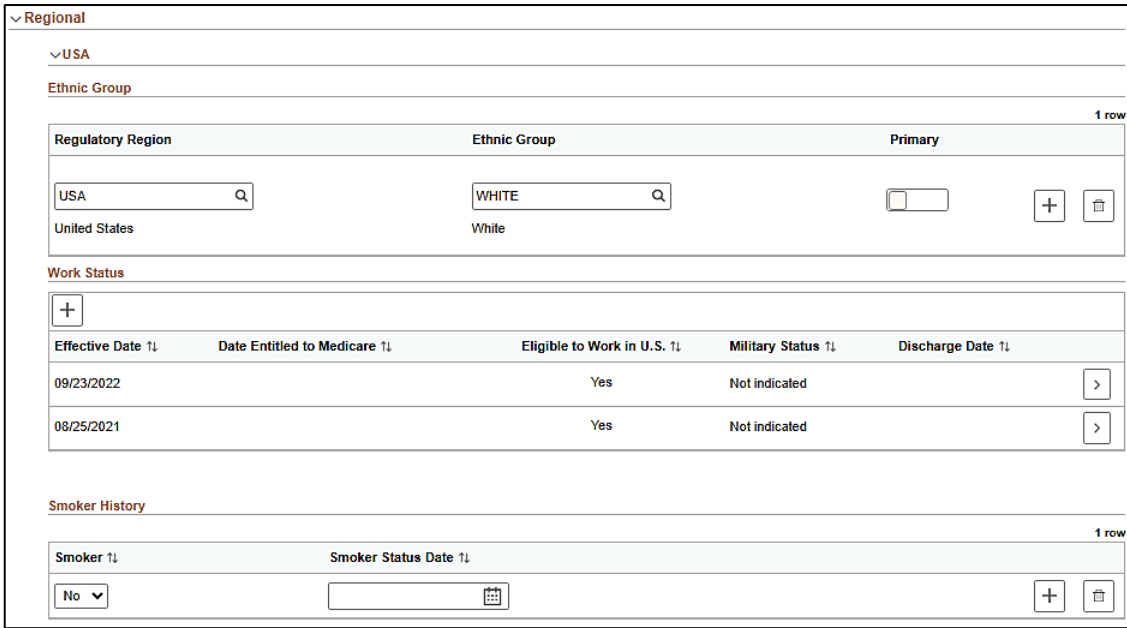
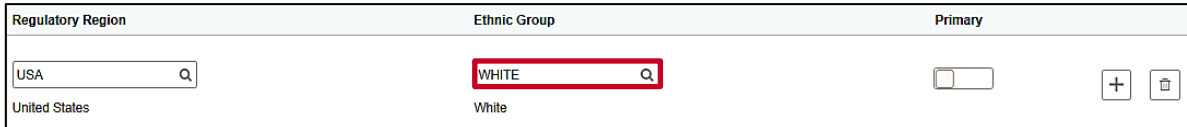
Human Resources Job Aid

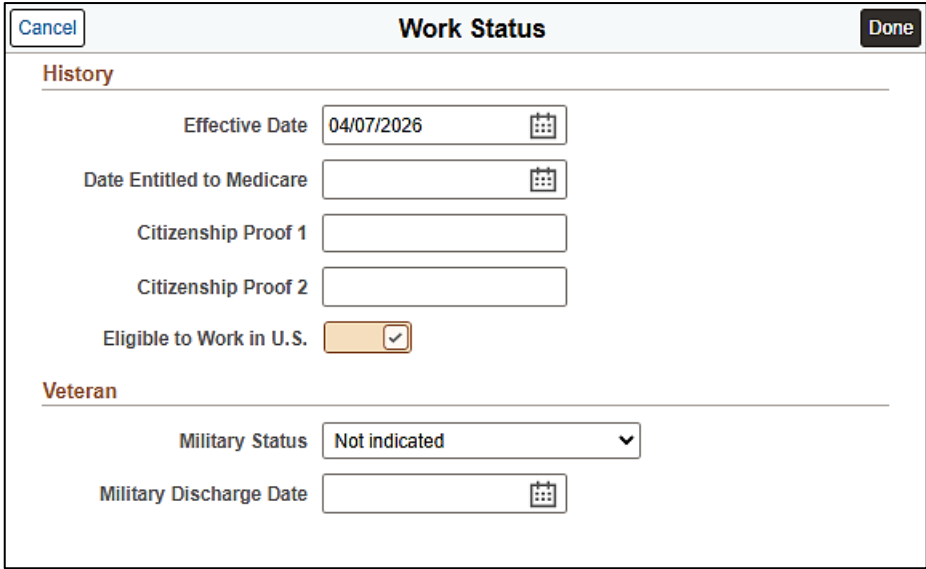
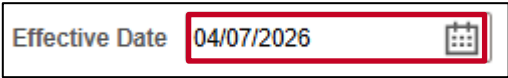
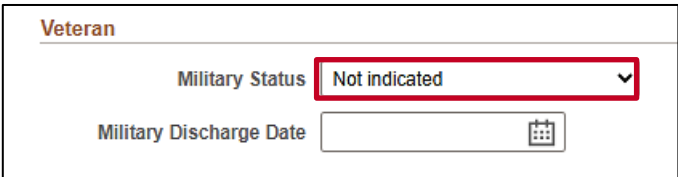
HR351 Viewing and Modifying Personal Data

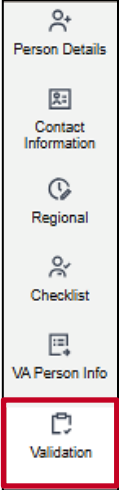
Updating Ethnic Group and Work/Military Status

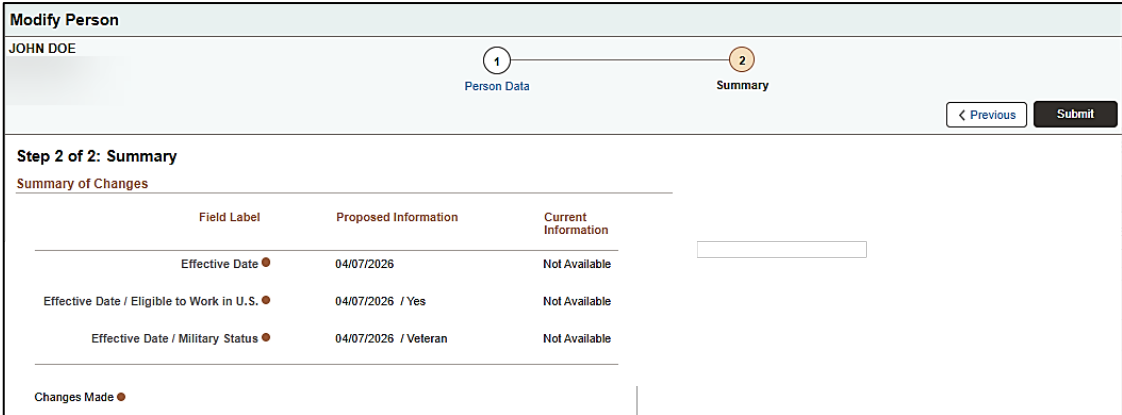
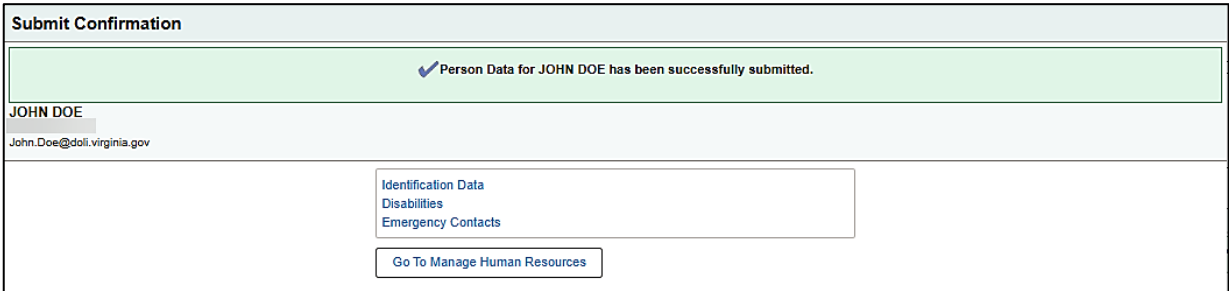
To update an employee's ethnic group or work/military status, users must first navigate to the **Modify a Person** page by following the instructions in the [Navigating to the Modify Person Page](#) section of this Job Aid.

Step	Action																									
	The Modify Person page displays, Step 1 of 2: Person Data, with the Person Details tab displayed by default. Modify Person JOHN DOE 1 Person Data 2 Summary Next > Person Details Contact Information Regional VA Person Info Validation Step 1 of 2: Person Data Person Details Names + <table><thead><tr><th>Format Type</th><th>Effective Date</th><th>Display Name</th><th>Formal Name</th><th></th></tr></thead><tbody><tr><td>English</td><td>09/23/2022</td><td>JOHN DOE</td><td>Mr JOHN DOE</td><td>></td></tr><tr><td>English</td><td>08/25/2021</td><td>JOHN DOE</td><td>Mr JOHN DOE</td><td>></td></tr></tbody></table> Personal Information *Date of Birth Birth Country USA United States Birth Location Date of Death Exclude Contact Information? Biographical Details + <table><thead><tr><th>Effective Date</th><th>Gender</th><th>Highest Education Level</th><th>Marital Status</th><th></th></tr></thead><tbody><tr><td>09/23/2022</td><td>Male</td><td>Bachelors Level Degree</td><td>Married</td><td>></td></tr></tbody></table>	Format Type	Effective Date	Display Name	Formal Name		English	09/23/2022	JOHN DOE	Mr JOHN DOE	>	English	08/25/2021	JOHN DOE	Mr JOHN DOE	>	Effective Date	Gender	Highest Education Level	Marital Status		09/23/2022	Male	Bachelors Level Degree	Married	>
Format Type	Effective Date	Display Name	Formal Name																							
English	09/23/2022	JOHN DOE	Mr JOHN DOE	>																						
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Effective Date	Gender	Highest Education Level	Marital Status																							
09/23/2022	Male	Bachelors Level Degree	Married	>																						
1.	Click the Regional tab. Person Details Contact Information Regional VA Person Info Validation																									

Step	Action
	The Regional section 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 Work Status section to update the employee's military status after their hire action is completed. 

Step	Action
	The Work Status page displays in a pop-up window. 
	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.
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. Note: The Military Discharge Date field is not used. 
6.	Click the Done button. 

Step	Action
7.	Click the Validation tab once all required updates are made. 
The Validation section displays. 	
	Validation messages may appear that include warnings and errors. If a Validation warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving. 
8.	Click the Next button once all required updates are made. 

Step	Action
	The Modify Person Step 2 of 2: Summary page displays the Summary of Changes. 
9.	Click the Submit button. 
	The Submit Confirmation page displays. 
	From the Submit Confirmation page, users can directly access the Identification Data page to enter citizenship information, the Disabilities page to note disabilities, and the Emergency Contact page to enter emergency contact information by clicking the respective links. These pages will open in a new window. Additionally, there is a Go To Manage Human Resources link to return to the Manage Human Resources homepage.



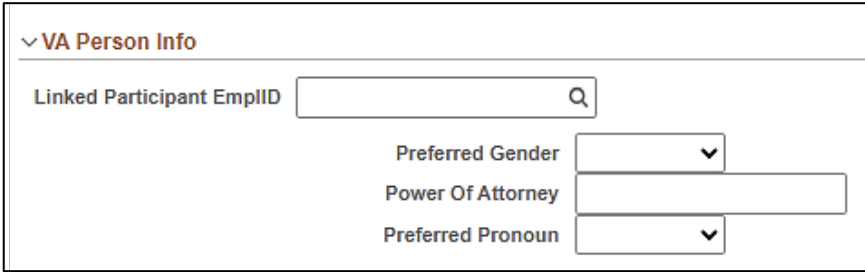
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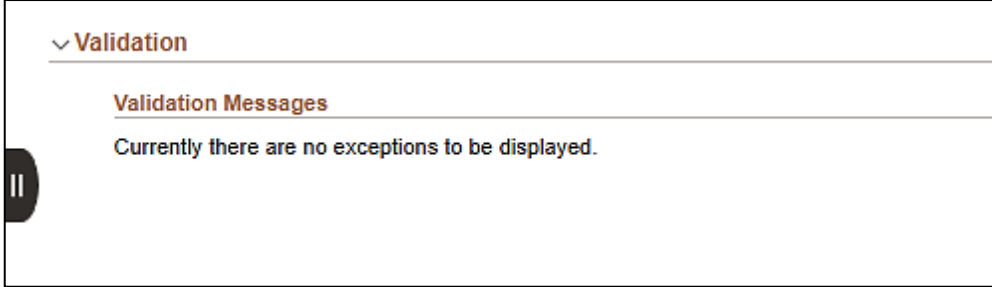
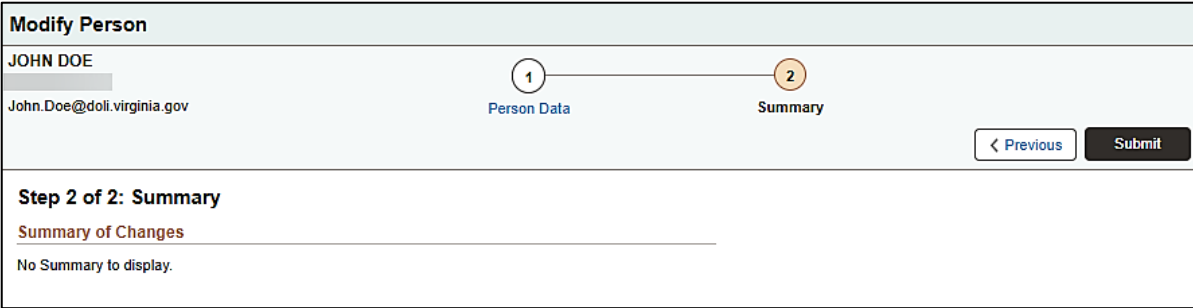
Updating VA Person Information

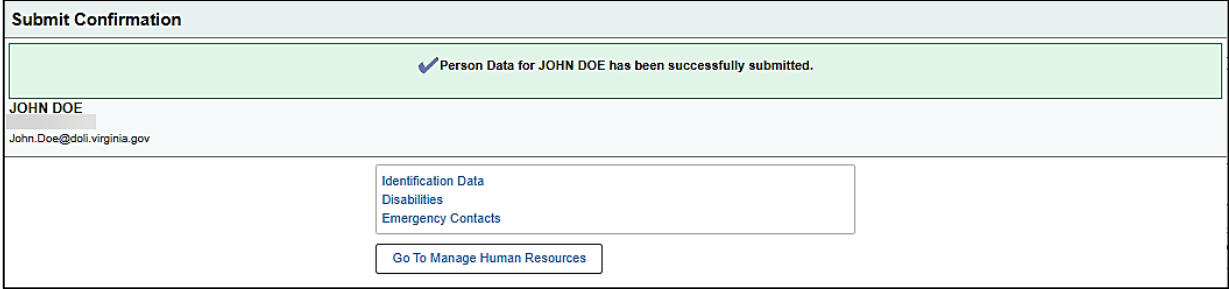
To update an employee's VA Person Information, users must first navigate to the **Modify a Person** page by following the instructions in the [Navigating to the Modify a Person Page](#) section of this Job Aid.

Step	Action																									
	The Modify Person page displays, Step 1 of 2: Person Data, with the Person Details tab displayed by default. Modify Person JOHN DOE 1 Person Data 2 Summary Next > Person Details Contact Information Regional VA Person Info Validation Step 1 of 2: Person Data Person Details Names <table><thead><tr><th>Format Type</th><th>Effective Date</th><th>Display Name</th><th>Formal Name</th><th></th></tr></thead><tbody><tr><td>English CURRENT</td><td>09/23/2022</td><td>JOHN DOE</td><td>Mr JOHN DOE</td><td>></td></tr><tr><td>English HISTORY</td><td>08/25/2021</td><td>JOHN DOE</td><td>Mr JOHN DOE</td><td>></td></tr></tbody></table> Personal Information *Date of Birth Birth Country Birth State Birth Location Date of Death Exclude Contact Information? Biographical Details <table><thead><tr><th>Effective Date</th><th>Gender</th><th>Highest Education Level</th><th>Marital Status</th><th></th></tr></thead><tbody><tr><td>09/23/2022 CURRENT</td><td>Male</td><td>Bachelors Level Degree</td><td>Married</td><td>></td></tr></tbody></table>	Format Type	Effective Date	Display Name	Formal Name		English CURRENT	09/23/2022	JOHN DOE	Mr JOHN DOE	>	English HISTORY	08/25/2021	JOHN DOE	Mr JOHN DOE	>	Effective Date	Gender	Highest Education Level	Marital Status		09/23/2022 CURRENT	Male	Bachelors Level Degree	Married	>
Format Type	Effective Date	Display Name	Formal Name																							
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Effective Date	Gender	Highest Education Level	Marital Status																							
09/23/2022 CURRENT	Male	Bachelors Level Degree	Married	>																						
1.	Click the VA Person Info tab. Person Details Contact Information Regional VA Person Info Validation																									

Step	Action
	The VA Person Info section displays. 
2.	Click the VA Person Info link to expand the section. 
	The VA Person Info section expands to show all the fields in this section. 
	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.
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 Gender dropdown button and select the preferred gender provided by the employee. 

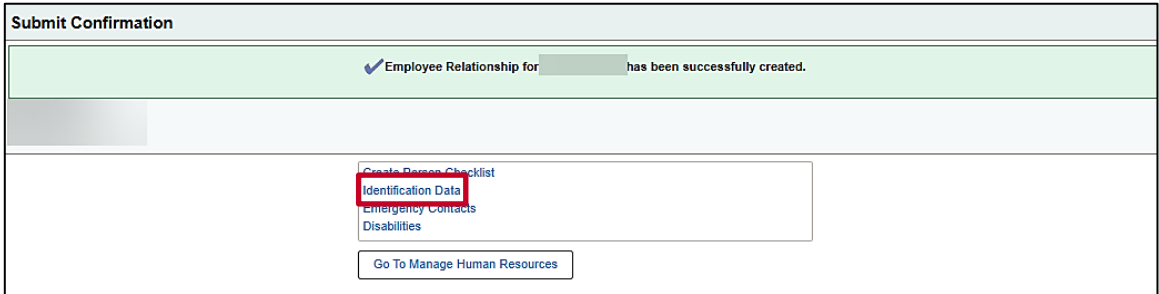
Step	Action
5.	Enter the name of the person who has legal Power of Attorney for the employee in the Power of Attorney field if applicable. Preferred Gender Power Of Attorney Preferred Pronoun
	The Power of Attorney is very useful in the unfortunate event of a death in service. This person needs to be contacted for decisions regarding payout of leave and/or death certificate request.
6.	Click the Preferred Pronoun dropdown button and select the preferred pronoun provided by the employee. Preferred Gender Power Of Attorney Preferred Pronoun
	The Power of Attorney, preferred pronoun, and preferred gender can be entered or updated via Employee Self-Service (ESS) by the employee.
7.	Click the Validation tab once all required updates are made. Person Details Contact Information Regional Checklist VA Person Info Validation

Step	Action
	The Validation section displays. 
	Validation messages may appear that include warnings and errors. If a Validation warning message appears, review the warning and make updates as needed or proceed with warning. Error messages must be addressed prior to saving. 
8.	Click the Next button once all required updates are made. 
	The Modify Person Step 2 of 2: Summary page displays the Summary of Changes. 
9.	Click the Submit button. 

Step	Action
	The Submit Confirmation page displays. 
	From the Submit Confirmation page, users can directly access the Identification Data page to enter citizenship information, the Disabilities page to note disabilities, and the Emergency Contact page to enter emergency contact information by clicking the respective links. These pages will open in a new window. Additionally, there is a Go To Manage Human Resources link to return to the Manage Human Resources homepage.

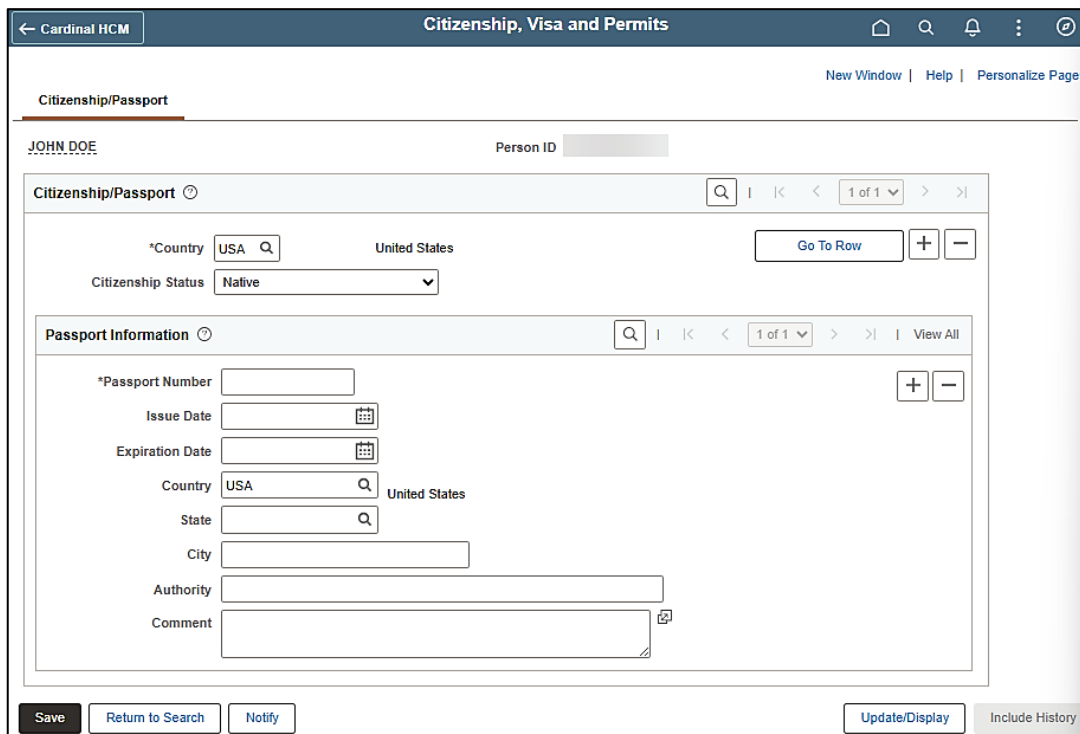
Updating Citizenship Status

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 Citizenship, Visa and Permits page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Citizenship > Citizenship, Visa and Permits
	Users may also access this page from the Submit Confirmation page during the hire process by clicking the Identification Data link. 
The Citizenship, Visa and Permits 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.

Step	Action
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. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. Empl ID begins with
3.	Click the Include History checkbox option. ☐ Case Sensitive ☒ Include History Search Clear
4.	Click the Search button. ☐ Case Sensitive ☒ Include History <input checked="" type="button" value="Search"/> Clear

The **Citizenship, Visa and Permits** page displays with the **Citizenship/Passport** tab displayed by default.



← Cardinal HCM **Citizenship, Visa and Permits** Home Search Bell Settings

New Window | Help | Personalize Page

Citizenship/Passport

JOHN.DOE Person ID

Citizenship/Passport 🔍 | |< < 1 of 1 > >|

*Country United States + -

Citizenship Status

Passport Information 🔍 | |< < 1 of 1 > >| View All

*Passport Number + -

Issue Date

Expiration Date

Country United States

State

City

Authority

Comment



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Step	Action
5.	Verify that the Country field is populated with “USA”. This field must always be “USA” as this field references the country of employment. *Country USA Q United States Citizenship Status Native ▼ Go To Row + -
	If the Country field does not display “USA”, update the field.
6.	Click the Citizenship Status dropdown button and select the new status. *Country USA Q United States Citizenship Status Native ▼ Go To Row + -
	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.
7.	Click the Save button. Save Return to Search Notify



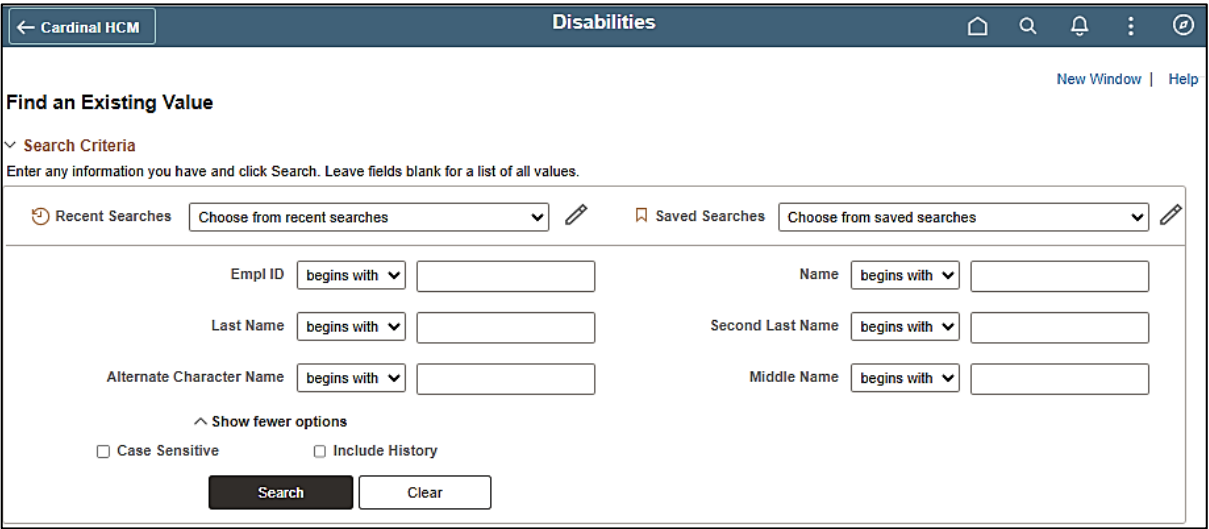
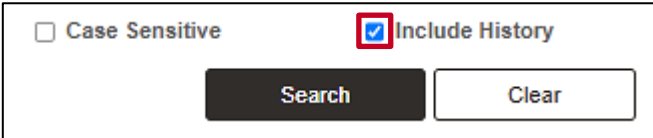
Human Resources Job Aid

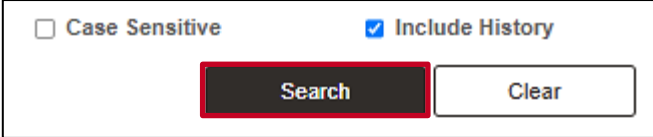
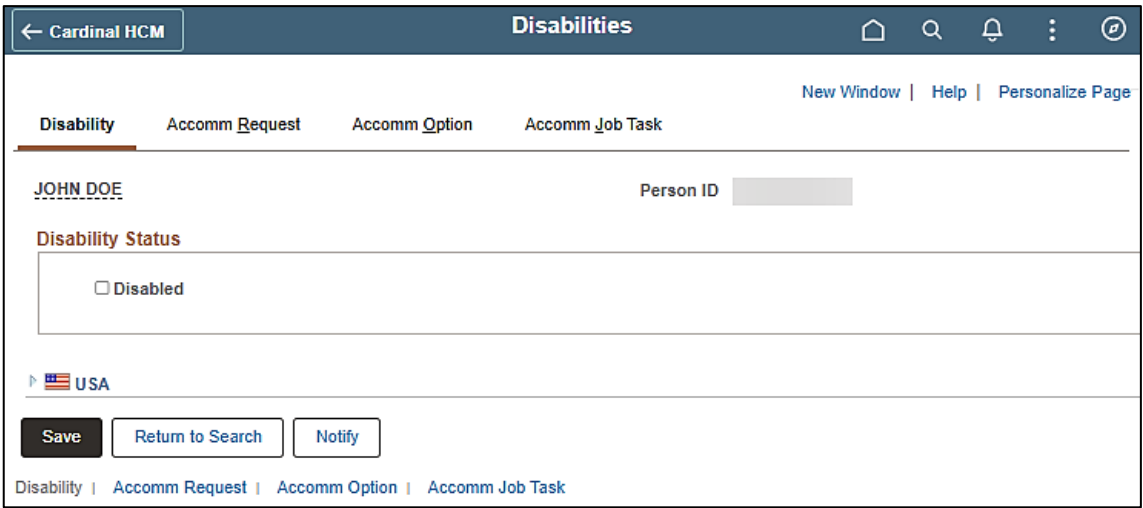
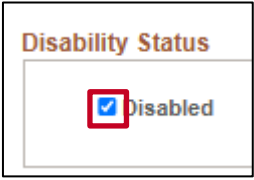
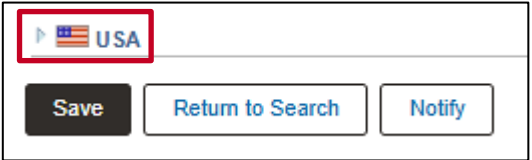
HR351 Viewing and Modifying Personal Data

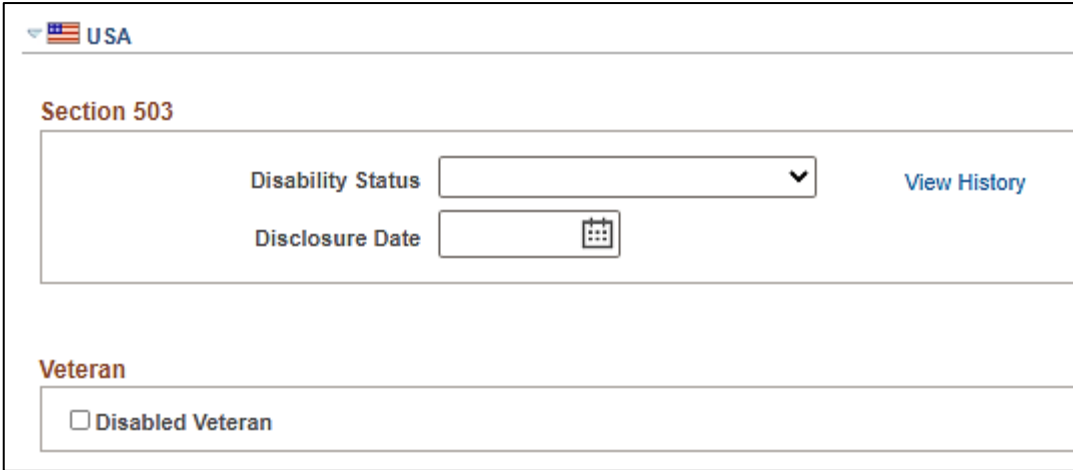
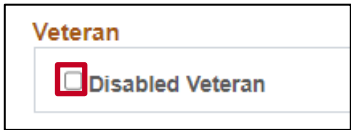
Citizenship Status Values

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.
Naturalized	A lawful permanent resident that has been granted U.S. citizenship.
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. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. 
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 if applicable. 
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.	Click the Disclosure Date Calendar icon and select the date the disability status was disclosed or updated. 
9.	If the employee is a disabled veteran, as identified on their DD214, click the Disabled Veteran checkbox option in the Veteran section. 
10.	Click the Save button. 



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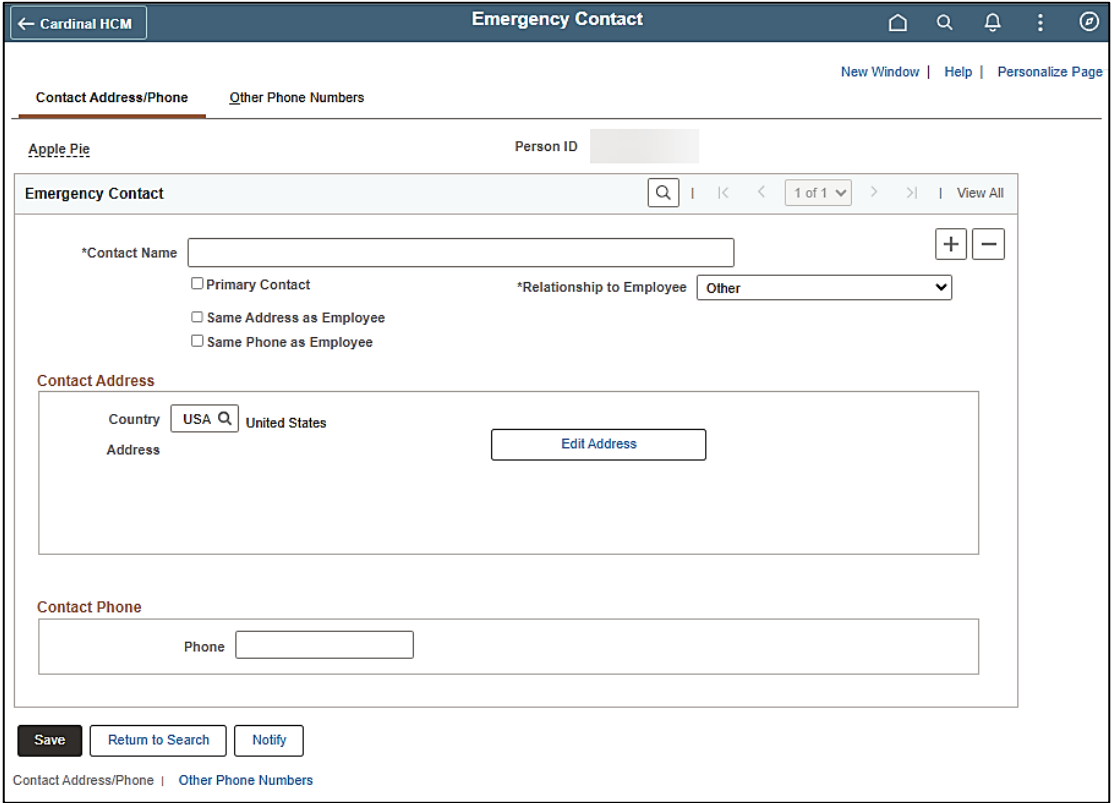
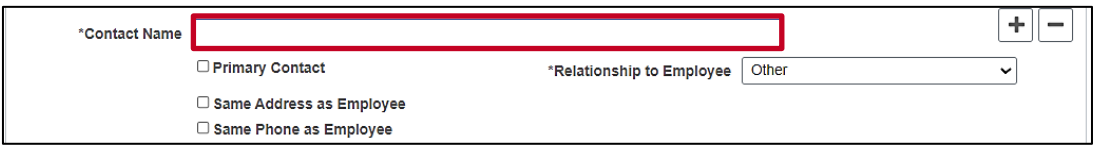
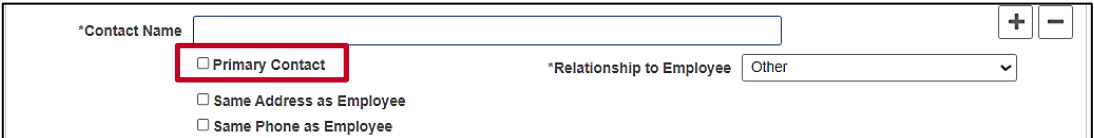
Updating Emergency Contact Information

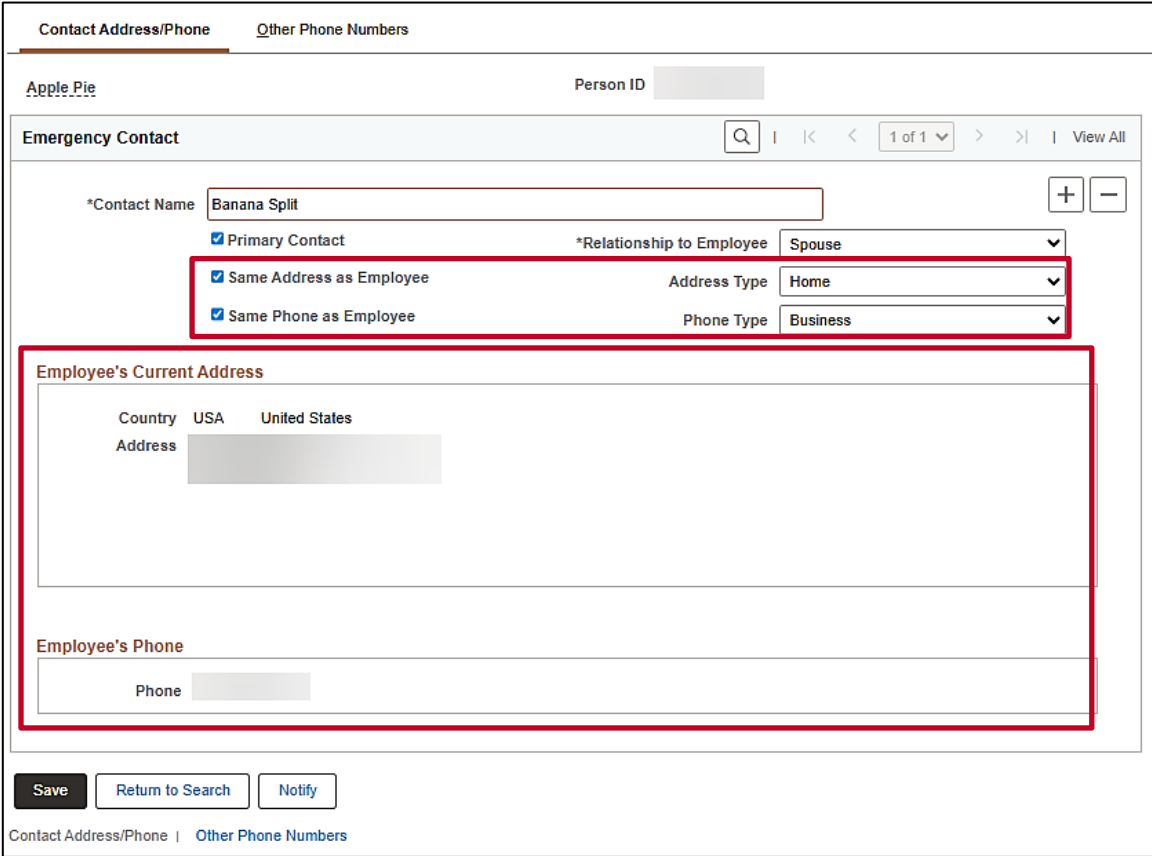
Step	Action
1.	Navigate to the Emergency Contact page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Personal Relationships > Emergency Contact
The Emergency Contact Find an Existing Value Search page displays.	
	For more information pertaining to the Cardinal 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. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.
3.	Click the Search button.



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Step	Action
	The Emergency Contact page for the employee displays with the Contact Address/Phone tab displayed by default. 
4.	Enter the emergency contact's first and last name in the Contact Name field. 
5.	If this is the employee's primary contact, check the Primary Contact checkbox option. Otherwise leave unchecked. 

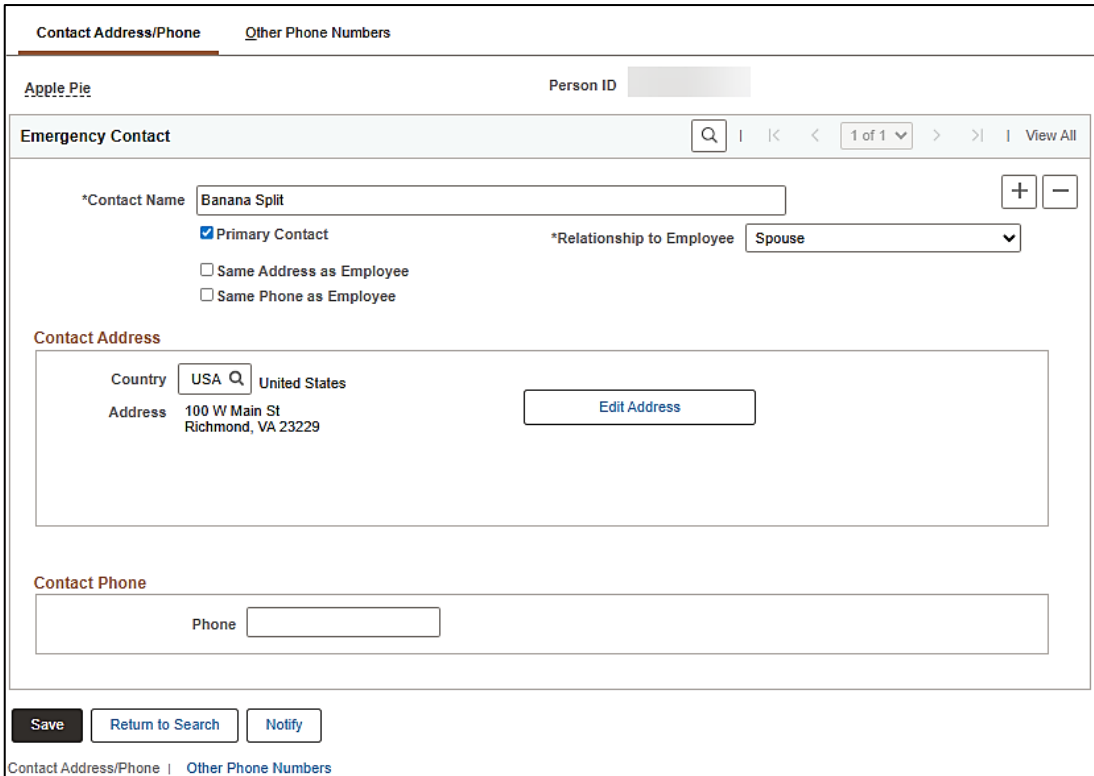
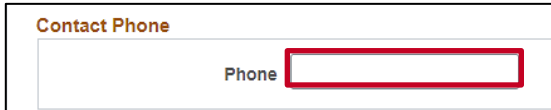
Step	Action
6.	Click the Relationship to Employee dropdown button and select the applicable value. 
7.	If the emergency contact's address and/or phone number is the same as the employee, click the Same Address as Employee and/or Same Phone as Employee checkbox options. 
	If the Same Address as Employee 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. 

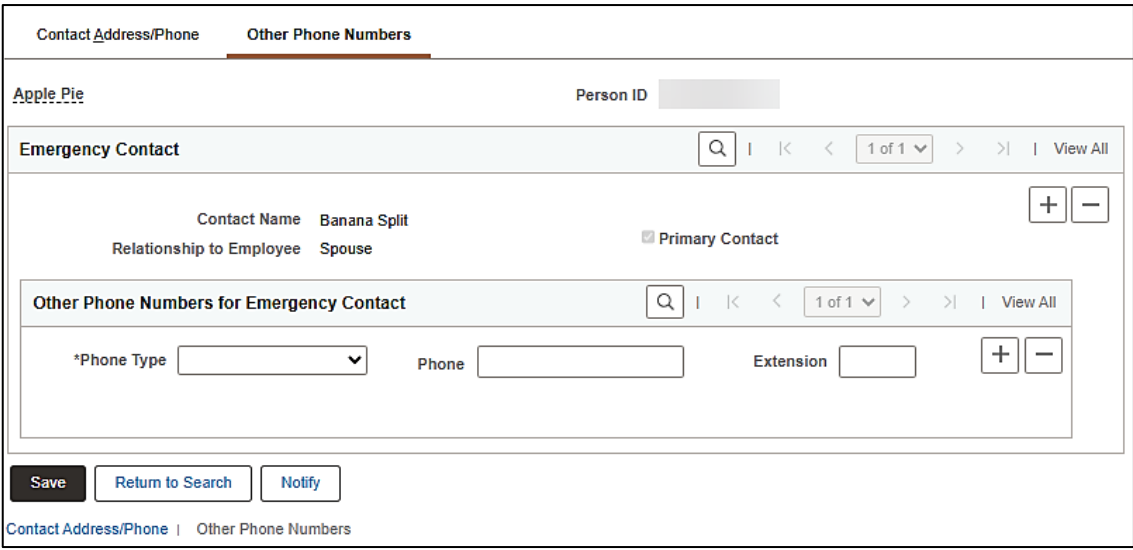


Human Resources Job Aid

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Step	Action
8.	If the emergency contact's address is not the same as the employee, click the Edit Address button in the Contact Address section. Contact Address Country USA United States Address Edit Address
The Edit Address page displays. Edit Address Country United States Change Country Address 1 Address 2 Address 3 City State Postal County OK Cancel	
9.	Complete all applicable fields on the Edit Address page for the emergency contact and then click the OK button. OK Cancel

Step	Action
	The Contact Address/Phone page redisplay. 
10.	Enter the emergency contact's phone number in the Phone field within the Contact Phone section. 
11.	Click the Other Phone Numbers tab. 

Step	Action
	The Other Phone Numbers page displays. 
12.	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. 
13.	Click the Save button. 