Cardinal Impact Guide:

Human Resources

September 2022



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# **Create and Maintain Position**

## HR01: Unique Position ID management

**Who is impacted?**

HR Specialists

**Process Change:**

All agencies will use Position IDs for all employees in Cardinal HCM.

Position IDs will be unique across the Commonwealth in Cardinal.

**VCCS Impact:**

All employees must be assigned to a position. Once they are assigned to the position, position data will populate on the job record.

**Resources:**

[HR351\_Managing Position Data](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351_Managing%20Position%20Data.pdf) - Job Aid

## HR03: Reuse of Positions in Cardinal

**Who is impacted?**

HR Specialists

**Process Change:**

In Cardinal, positions cannot be deleted once a position number is established. Positions are effective dated.

Agencies should review and re-activate positions that were inactive, where possible, instead of creating new positions.

**VCCS Impact:**

It is recommended that agencies reuse position numbers, so their position list remains manageable.

When reactivating positions, review and/or change the attributes before reusing the number.

**Resources:**

[HR351\_Managing Position Data](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351_Managing%20Position%20Data.pdf) - Job Aid

## HR04: Position Default funding

**Who is impacted?**

HR Specialists

**Process Change:**

In Cardinal, position default funding will not be directly defined on the position page. Positions can be saved in Cardinal without defining position default funding.

Position and/or department default funding is maintained on a separate page. Position default funding is recommended for all positions. Department default funding is required.

Cardinal reports will help agencies monitor positions without position default funding.

**VCCS Impact:**

Agencies need to be made aware of the criticality of defining default position/department funding due to the impact to payroll.

This information is also reported to the Department of Planning and Budget (DPB) and used for Employee Position Reporting (EPR).

If position default funding is not defined, department default funding will be used.

**Resources:**

[HR351 Position ChartField Assignment/Update](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/HR351%20Position%20ChartField%20Assignment_Update.pdf) - Job Aid

## HR05: Virginia Personnel Act (VPA) Flag Process

**Who is impacted?**

HR Specialists

**Process Change:**

There will be a flag on the position record in Cardinal to indicate whether the position is covered under the Virginia Personnel Act (VPA). Agencies need to actively maintain this field.

**VCCS Impact:**

Many HR reports use VPA classification as a parameter. Additionally, performance ratings, rewards\*, and disciplinary actions can only be reported for employees in VPA covered positions in Cardinal.

\* includes gubernatorial appointees

**Resources:**

[HR351\_Managing Position Data](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351_Managing%20Position%20Data.pdf) - Job Aid

[Position Management](https://onvccs.sharepoint.com/%3Aw%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/EWLTFewT9F9BlzTTps0rnL8BKnomlfMWrKMlHAe8hMY7og?e=Ulq5PU) - word doc

[Employee Attributes Chart](https://onvccs.sharepoint.com/%3Ax%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/ESzNeXoe2-NNqsjogWdU1akBWm6BeevpspmlIQGsg9Sh_A?e=FSA2OI) - excel sheet

## HR06: Department ID to Position Assignment Process

**Who is impacted?**

HR Specialists and Finance

**Process Change:**

Employee data, except for expense transaction default ChartField values and user preferences, will be maintained in Cardinal HCM and synced to Cardinal FIN to set up the employee profile in the Expenses module.

The Department ID assigned to a position flows to the employee profile in the Expenses module.

Department ID drives an alternate workflow routing on cash advances, expense reports, and travel authorizations after the supervisor level of approval.

**VCCS Impact:**

Agencies will need to consider the multiple uses of Department ID in Cardinal HCM when setting up an employee.

Employee personal and job-related data on the Expenses employee profile in Cardinal FIN will originate from Cardinal HCM.

**Resources:**

[HR351\_Managing Position Data](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351_Managing%20Position%20Data.pdf) - Job Aid

[HR351 Position ChartField Assignment/Update](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/HR351%20Position%20ChartField%20Assignment_Update.pdf) - Job Aid

# **Hire/Rehire Employee**

## HR08: View Current/Previous Agency during Hire/Rehire

**Who is impacted?**

HR Specialists

**Process Change:**

Agencies have the ability to view an employee’s current and/or previous agency of employment (post-conversion records only) during the hire/rehire process in Cardinal.\*

\* Includes employees of localities participating in the health benefit program

**VCCS Impact:**

Agencies will now be able to see current and prior state employment when hiring/rehiring. This will help agencies during onboarding (e.g., break in service, years of service, continuation of benefits, dual employment).

An online checklist will be available in Cardinal to assist agencies with new hires (see HR14 for related transfer impact).

**Resources:**

[HR351 Impact of Breaks in Service Overview](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351_Impact%20of%20Breaks%20in%20Service%20Overview.pdf) - job aid

[Cardinal HR351 Impact of Breaks in Service Calculator](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.cardinalproject.virginia.gov%2Fsites%2Fdefault%2Ffiles%2F2022-03%2FCardinal%2520HR351%2520Impact%2520of%2520Breaks%2520in%2520Service%2520Calculator_2.xlsx&wdOrigin=BROWSELINK) - job aid

# **Maintain Employee Data**

## HR09: Employee Classification Requirement

**Who is impacted?**

HR Specialists

**Process Change:**

Employee Classification (e.g., adjunct faculty, general wage, classified, student, wage non-employee) is required for Cardinal processing.

The Employee Classification will be used to apply Department of Planning and Budget (DPB) designated expense account codes (Cardinal Account ChartField values) for productive time payroll earnings.

**VCCS Impact:**

Agencies must accurately assign and maintain the Employee Classification in Cardinal for accurate payroll accounting.

Employee Classification will also be included in many HR reports to help identify the various types of employees.

**Resources:**

[HR351\_Managing Position Data](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351_Managing%20Position%20Data.pdf) - Job Aid

[Cardinal HCM Configuration Values](https://onvccs.sharepoint.com/%3Ax%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/EfAYh9l9L-9PkYBQzLDPqCcBBrmtT3Rv4LkbKAPNrXLgnw?e=SqEHVR) - excel sheet

[Employee Attributes Chart](https://onvccs.sharepoint.com/%3Ax%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/ESzNeXoe2-NNqsjogWdU1akBWm6BeevpspmlIQGsg9Sh_A?e=FSA2OI) - excel sheet

## HR10: HR Data Impact to Health Benefits

**Who is impacted?**

Employees and HR Specialists

**Process Change:**

Cardinal will allow for the interfacing of HR data (e.g., personal, position, employee job data) from agency systems to Cardinal.

Employees at agencies that are interfacing personal data to Cardinal will have view-only access for personal data in Employee Self-Service (ESS).

ESS users will still be able to manage open enrollment and other ESS functions based on agency attributes.

**VCCS Impact:**

Because HR data directly impacts employee health benefits and statewide payroll, interfacing agencies will need to submit files, review error reports, and take appropriate corrective action in a timely manner.

**Resources:**

[Personal Info Change Form](https://onvccs.sharepoint.com/%3Aw%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/ERsKhpsP-HxKglfoTzR6rb4BLZiKkRlcTSnFw-IhyYuXgQ?e=FiUmf9) - word doc

[Name Change](https://onvccs.sharepoint.com/%3Aw%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/EeVg3_FACWRKovnDPfG6ewkBETd2RXQ-DV5uc0NfTt_cGw?e=haEssm) - word doc

## HR12: Single Personnel Record Across all Agencies

**Who is impacted?**

HR Specialists

**Process Change:**

In Cardinal, an employee has only one personal data record (e.g., name, address, SSN, birth date).

**VCCS Impact:**

The personal data record for an employee can be viewed by any agency where the employee has worked, and can be updated by any agency where the employee is currently working.

ESS-initiated name changes will be routed to HR staff at all current agencies of employment.

Upon approval by one agency, the name change is finalized in Cardinal. A notification will display on the HR staff’s Cardinal HCM home page, for all applicable agencies.

**Resources:**

[H2R Processing Change Proposal\_No Longer using Additional Names Page](https://onvccs.sharepoint.com/%3Aw%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/EezRoHUF9sRPuCGbiidOvKsB_ktOAGq5ccNYB07-AbEspQ?e=db3doj) - word doc

[Personal Info Change Form](https://onvccs.sharepoint.com/%3Aw%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/ERsKhpsP-HxKglfoTzR6rb4BLZiKkRlcTSnFw-IhyYuXgQ?e=FiUmf9) - word doc

[Name Change](https://onvccs.sharepoint.com/%3Aw%3A/s/VCCS-CardinalHumanCapitalManagementProjectHCM2/EeVg3_FACWRKovnDPfG6ewkBETd2RXQ-DV5uc0NfTt_cGw?e=haEssm) - word doc

## HR13: Action/Action Reason Code Requirements

**Who is impacted?**

HR Specialists

**Process Change:**

Currently, PMIS utilizes transaction codes to enforce DHRM policy through extensive system edits. This often requires DHRM system intervention to process numerous policy exceptions.

In Cardinal, Action/Action Reason codes are utilized and system edits are predominately limited to critical statewide rules that impact pay.

**VCCS Impact:**

In Cardinal, agency users will need to know and follow HR policy to properly enter HR transactions with the correct Action/Action Reason codes.

Agencies will have greater flexibility and responsibility when entering compensation and job data changes.

Reduced edits will lead to fewer system exception interventions.

Reports are available to monitor compensation changes and correct HR transaction entry.

**Resources:**

[HR351 Action/Action Reasons](https://view.officeapps.live.com/op/view.aspx?src=https%3A%2F%2Fwww.cardinalproject.virginia.gov%2Fsites%2Fdefault%2Ffiles%2F2021-07%2FHR351%2520Action%2520Reason.xlsx&wdOrigin=BROWSELINK) - job aid

HR352 Action/Action Reasons (Benefits Only) - job aid

Appendix A: VCCS Action/Actions Reasons Crosswalk

# **Transfer Employee**

## HR14: Employee leaving agency and job record process

**Who is impacted?**

HR Specialists

**Process Change:**

In Cardinal, if an employee is leaving an agency, it is imperative that the agency terminate the employee’s job record.

Inter-agency transfers will be entered as a termination of the existing job record in the sending agency, and entered as a new hire/rehire record in the receiving agency.

**VCCS Impact:**

Unless terminated in the application, employees will continue to be paid and/or benefited in Cardinal by that agency.

For employees transferring between agencies, a specific Action/Action Reason code should be applied to allow for the continuation of the employee’s health benefits.

An online checklist will be available in Cardinal to assist agencies with new hires and terminations.

**Resources:**

[VCCS Action/Actions Reasons Crosswalk](https://docs.google.com/spreadsheets/d/1wJ4n1gFrVLp3BLnNt2Q1L1rCPm83QvGC/edit?usp=sharing&ouid=102217279508622545222&rtpof=true&sd=true)

# **Mass HR Data Maintenance**

## HR15: Mass Update Options

**Who is impacted?**

HR Specialists and System Office IT (Technical Team)

**Process Change:**

In Cardinal, agencies will have the option to use mass update processes for certain transactions when a large volume of data changes is required (i.e., position, new hires, job, leave awards, bonus awards, performance ratings, and additional pays). These mass update processes should be used on an infrequent basis.

The procedure for loading the mass updates will vary slightly depending on the type of data.

To initiate the mass update, the agency will populate the spreadsheet template with the data changes and either run the mass upload through the run control page in Cardinal or submit the request to DHRM (i.e., job data, new hires, position) for review, approval, and processing.

**VCCS Impact:**

Agencies can reduce online data entry for certain high volume updates.

**Resources:**

[Performing a Mass Upload](https://www.cardinalproject.virginia.gov/sites/default/files/2021-10/Cross%20Functional_Performing%20a%20Mass%20Upload.pdf) - job aid

# **Maintain Additional pay**

## HR16: Automatic Special Pays and Recurring Pays

**Who is impacted?**

HR Specialists and Payroll

**Process Change:**

CIPPS automatic special pays with fixed, recurring amounts (other than temporary pay and military pay) are maintained by Payroll staff.

In Cardinal, HR staff will both approve and enter recurring additional pays (e.g., temporary pay, military pay,, cell phone stipends).

**VCCS Impact:**

HR and Payroll staff will need to be notified of all recurring additional pays that require entry in Cardinal.

VCCS Specific: Same process and same data just a different page. Instead of the Job Data page it will be on the additional pay page. An Action and Action-Reason code will need to be entered on the Job Data page in order to trigger the data on the Additional Pay Page to interface to Cardinal.

## HR20: Adjunct Payroll Process

**Who is impacted?**

HR Specialists and Payroll

**Process Change:**

VCCS will use Additional Pay and a mass upload process for adjunct pay.

**VCCS Impact:**

This is a new process for some colleges.

**Resources:**

Communications supporting this change will be forthcoming.

# **Enter and Maintain Disciplinary Actions**

## HR17: View All Disciplinary Action from Current and Previous Agencies

**Who is impacted?**

College HR

**Process Change:**

The current agency will be able to view all written notice and disciplinary action history for their employees in Cardinal, including previous agency history from disciplinary actions taken in Cardinal. Any disciplinary actions that were inactive prior to Cardinal go-live will not be available in the application.

**VCCS Impact:**

Agencies will no longer need to reach out to previous agencies for written notices and disciplinary action history, except for notices prior to Cardinal go-live.

**Resources:**

[HR351 Entering and Maintaining Disciplinary Actions](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351%20Entering%20and%20Maintaining%20Disciplinary%20Actions.pdf) - Job Aid

[HCM Reports Catalog](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/HCM%20Reports%20Catalog.pdf) - Disciplinary Actions Summary Report (RHR248)

# **Enter and maintain Rewards and Recognitions**

## HR19: Reward and Recognition Edits

**Who is impacted?**

College HR (Leave Awards) and HR Specialists (Monetary Bonuses)

**Process Change:**

Currently, PMIS enforces statewide reward and recognition policy limits using system edits.

In Cardinal, reward and recognition edits do not exist. Agency HR staff will need to know reward and recognition policy to remain compliant.

Additional edits and/or controls will be provided for agencies using Cardinal AM and/or Payroll.

**VCCS Impact:**

Year-to-date amounts and hours are visible online and in reports for agencies to review prior to and after granting awards, to ensure they are compliant with policy.

**Resources:**

[HR351 Rewards and Recognition](https://www.cardinalproject.virginia.gov/sites/default/files/2021-07/HR351%20Rewards%20and%20Recognition.pdf) - Job Aid

[HCM Reports Catalog](https://www.cardinalproject.virginia.gov/sites/default/files/2021-09/HCM%20Reports%20Catalog.pdf) - Specifically Cardinal HRPY Reconciliation Query V\_HR\_REW\_PAY\_RECON

# **General Finance and Cardinal Links**

<https://www.cardinalproject.virginia.gov/job-aids> - When using this website, please pay attention to the modules and applications to avoid confusion.

