

HR352_ Completing a New Hire (Benefits Only)**Completing a New Hire Overview**

This business process is applicable to both Health Benefits Only (HBO) Agencies and localities in The Local Choice (TLC) Benefit Program.

All required information must be entered using the tabs on the page or the transaction cannot be saved.

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HR352_ Completing a New Hire (Benefits Only)**Adding a New Hire**

Before beginning, the applicable employee's Social Security Number (SSN) must be available for immediate reference. This process is performed to validate that the new employee is not currently in the Cardinal system, or to obtain the existing Employee ID if the employee is already in the system.

1. Navigate to the **Add a Person** page using the following path to search for matching persons:

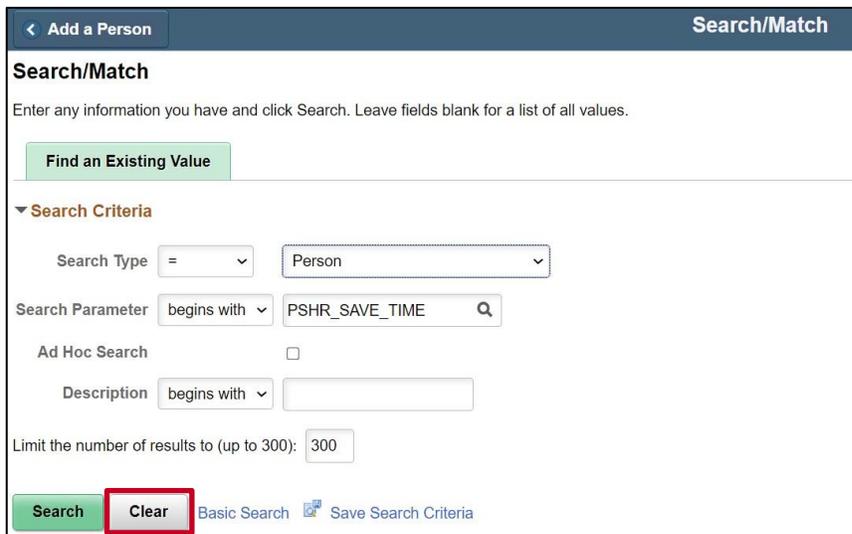
Navigator > Workforce Administration > Personal Information > Add a Person

The **Add a Person** page displays.



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

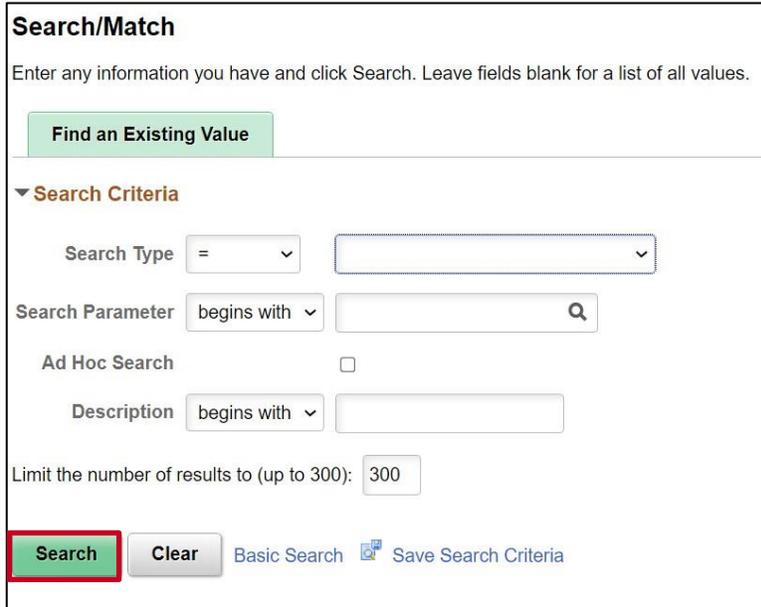
The **Search/Match** search page displays.



3. Click the **Clear** button.

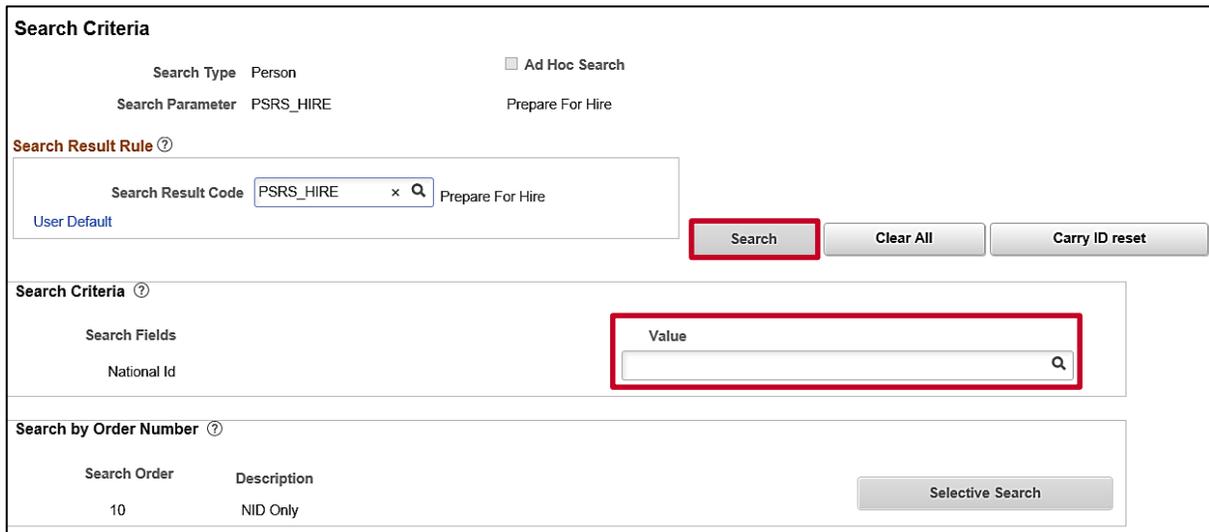
HR352_Completing a New Hire (Benefits Only)

The **Search/Match** search page refreshes.



4. Click the **Search** button.

The **Search/Match** page displays.



5. Enter the employee's SSN into the **Value** field.

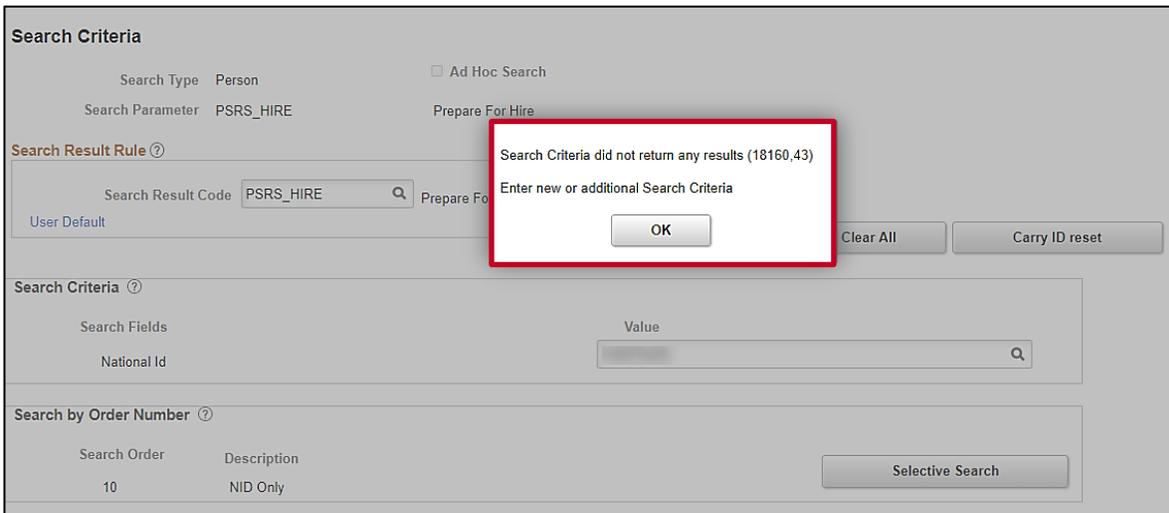
6. Press the **Tab** key on the keyboard to enable the **Search** button.

7. The SSN is reformatted automatically (i.e., dashes are removed if they were entered). Click the **Search** button.

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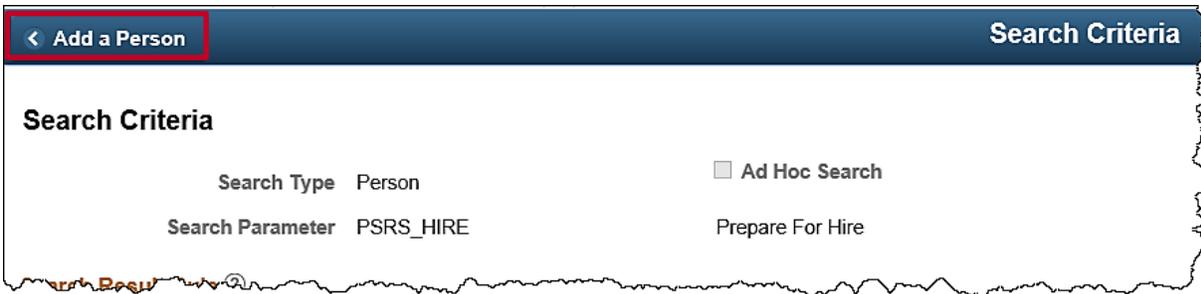
The **Search Results** page displays in a pop-up window.

Note: The message depicted below displays when the employee's SSN is not already in the Cardinal system and an Employee ID number will be assigned after the personal data has been entered and saved. If the system displays an Employee ID, the employee already exists in the Cardinal system. A transfer or rehire should be completed as applicable. For further information on transferring existing employees, refer to the Job Aid titled **HR351_Completing an Inter-Agency Transfer**. For further information on rehiring employees, refer to the Job Aid titled **HR351_Completing a Rehire**. These Job Aids can be found on the Cardinal website in **Job Aids** under **Learning**.



8. Click the **Ok** button to close the pop-up window.

The **Search Criteria** page returns.



9. Click the **Add a Person** button in the top left-hand corner of the page.

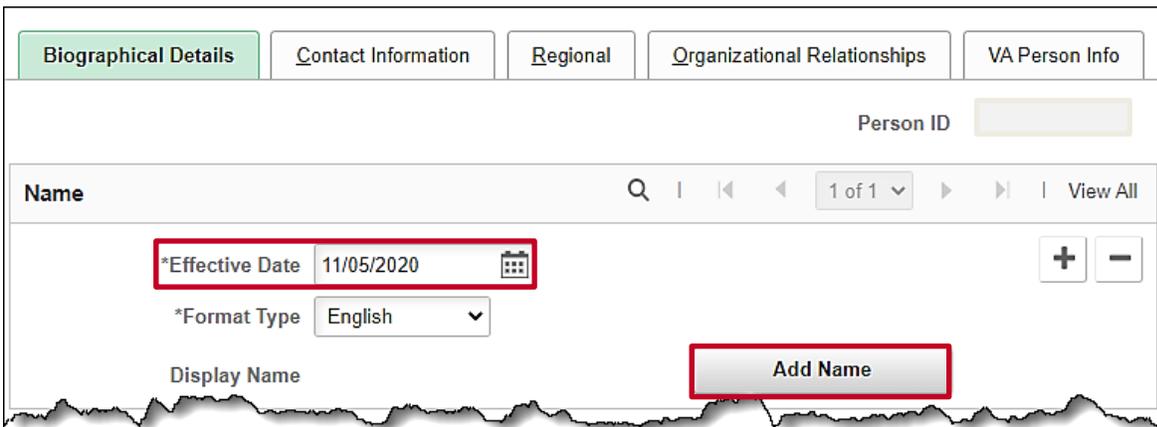
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The **Add a Person** page displays.



10. Click the **Add Person** button.

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



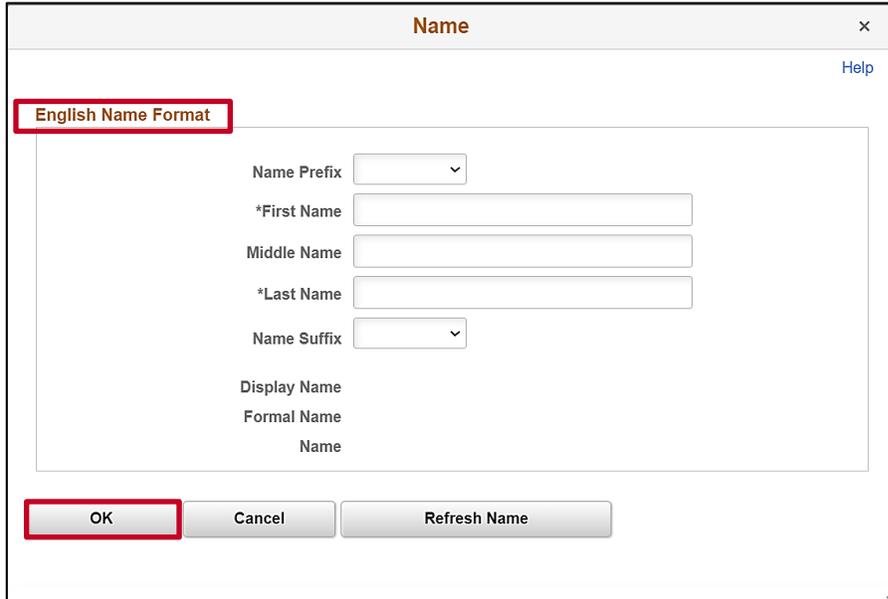
11. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon.

Note: For further information on effective dating, see the Job Aid titled **HR351_ Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

12. Click the **Add Name** button.

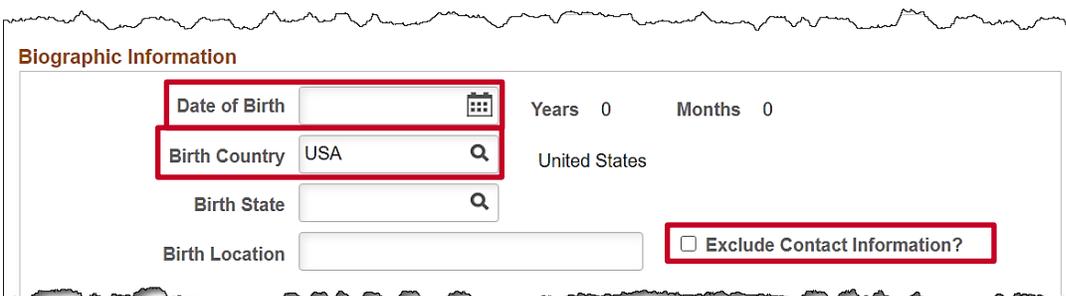
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The **Name** page displays in a pop-up window.



13. Select the applicable prefix using the **Name Prefix** field dropdown button (optional).
14. Enter the employee's first name in the **First Name** field (required).
15. Enter the employee's middle name in the **Middle Name** field (optional).
16. Enter the employee's last name in the **Last Name** field (required).
17. Select the applicable suffix using the **Name Suffix** field dropdown button (optional).
18. Click the **Refresh Name** button. The **Display Name**, **Formal Name**, and **Name** fields will auto-populate based on the information entered.
19. Click the **OK** button.

The **Modify a Person** page returns. Scroll down to the **Biographic Information** section as required.

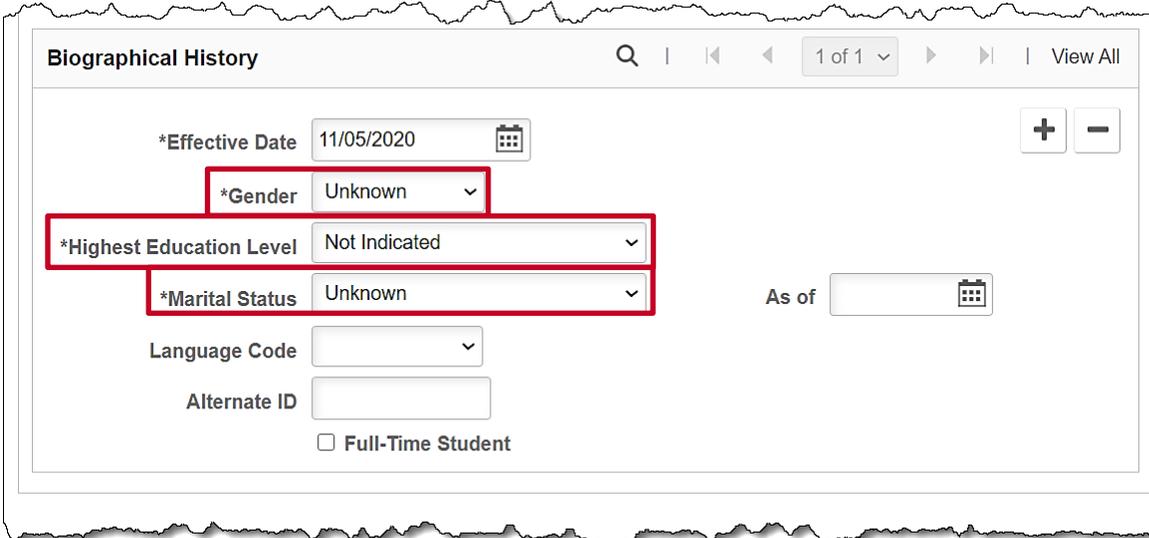


20. Select the employee's date of birth (required) using the **Date of Birth Calendar** icon.
21. The **Birth Country** field defaults to "USA". Update as needed using the **Look Up** icon.
22. The **Birth State** and **Birth Location** fields are optional.

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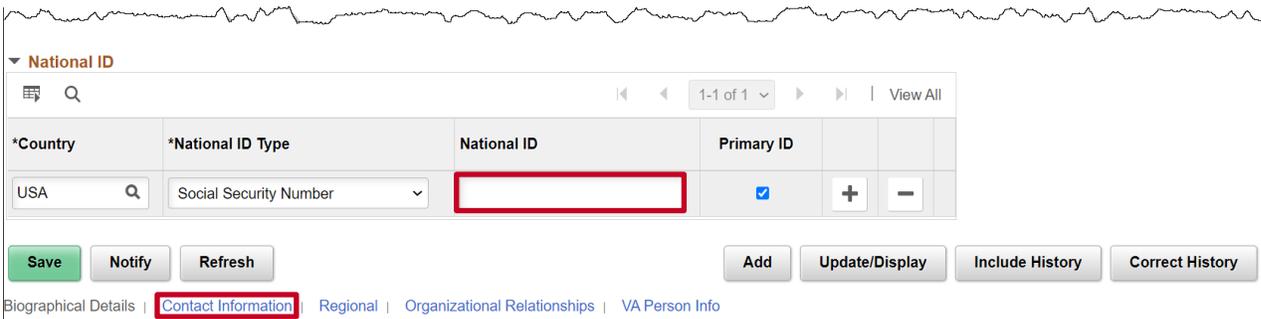
23. Select the **Exclude Contact Information** (optional) if the employee’s contact information should NOT be sent to VITA in the Active Directory Extract or COV Employee Directory Extract.
24. Scroll down to the **Biographical History** section.

The **Biographical History** section displays.



25. The **Gender** field is a required field for benefits purposes and defaults to “Unknown”. Select the legal gender of the employee using the dropdown button.
26. The **Highest Education Level** field is a required field and defaults to “Not Indicated”. Select the employee’s highest level of education using the dropdown button.
27. The **Marital Status** field is a required field for benefits purposes and defaults to “Unknown”. Select the legal marital status of the employee using the dropdown button to prevent errors from being reported on audit reports.
28. The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.
29. Scroll down to the **National ID** section.

The **National ID** section displays.

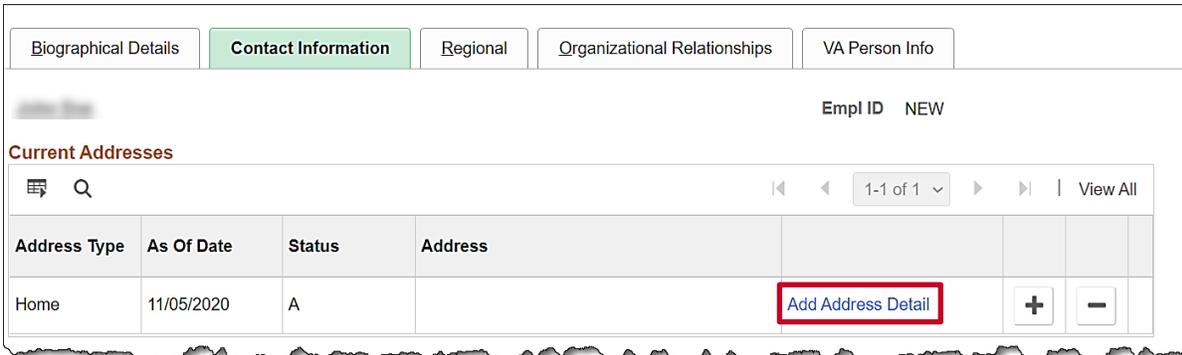


30. Enter the employee’s SSN in the **National ID** field.

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31. Click the **Contact Information** link.

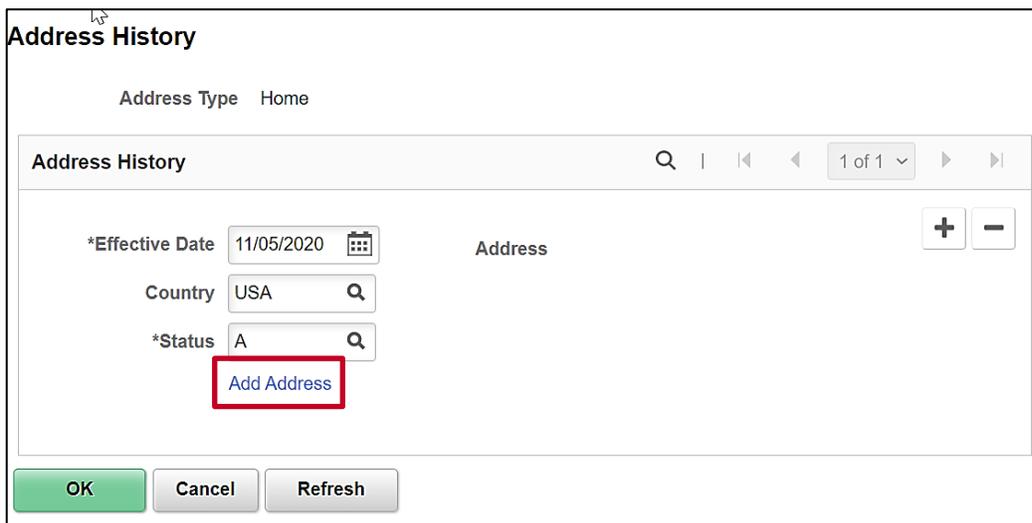
The **Contact Information** tab displays.



Address Type	As Of Date	Status	Address
Home	11/05/2020	A	Add Address Detail

32. Click the **Add Address Detail** link.

The **Address History** page displays.

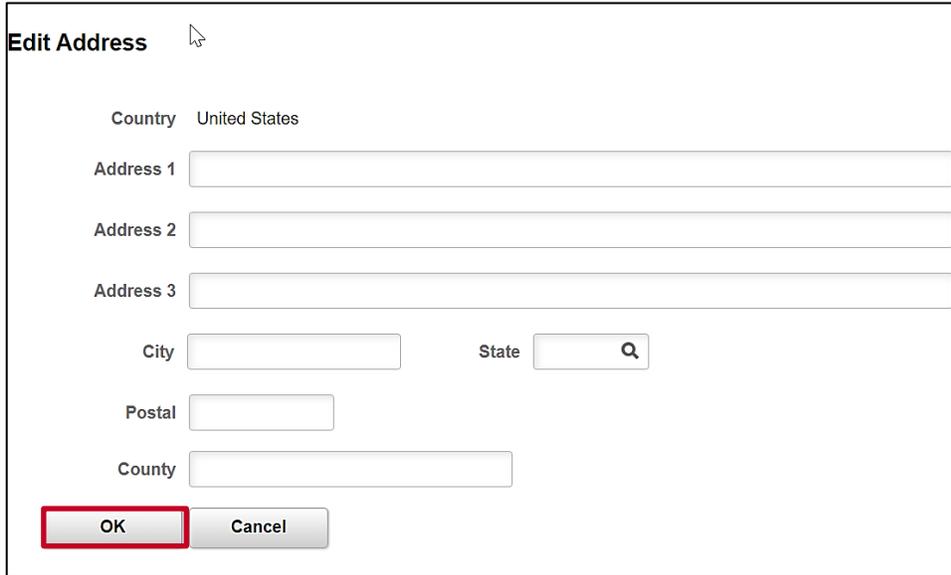


*Effective Date	Country	*Status	Address
11/05/2020	USA	A	Add Address

33. Click the **Add Address** link.

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The **Edit Address** page displays.



Edit Address

Country United States

Address 1

Address 2

Address 3

City State

Postal

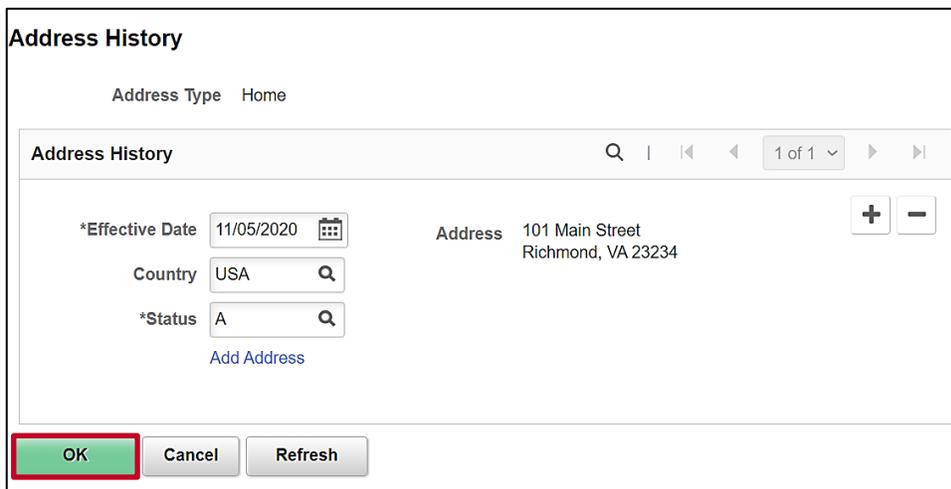
County

OK Cancel

34. Enter the employee's complete address information using the applicable fields. **Address 1**, **City**, **State**, and **Postal** are all required fields. The others are optional.

35. Click the **OK** button.

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



Address History

Address Type Home

Address History | 1 of 1

*Effective Date	11/05/2020	Address	101 Main Street Richmond, VA 23234
Country	USA		
*Status	A		

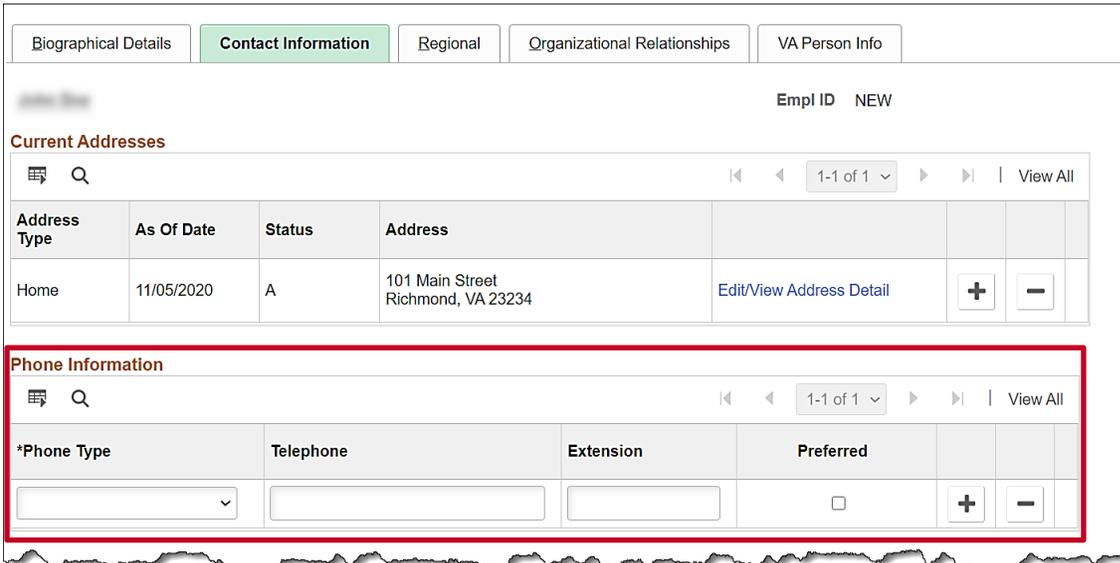
[Add Address](#)

OK Cancel Refresh

36. Click the **OK** button.

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The **Contact Information** tab returns.



Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

Empl ID NEW

Current Addresses

1-1 of 1 | View All

Address Type	As Of Date	Status	Address		
Home	11/05/2020	A	101 Main Street Richmond, VA 23234	Edit/View Address Detail	+ -

Phone Information

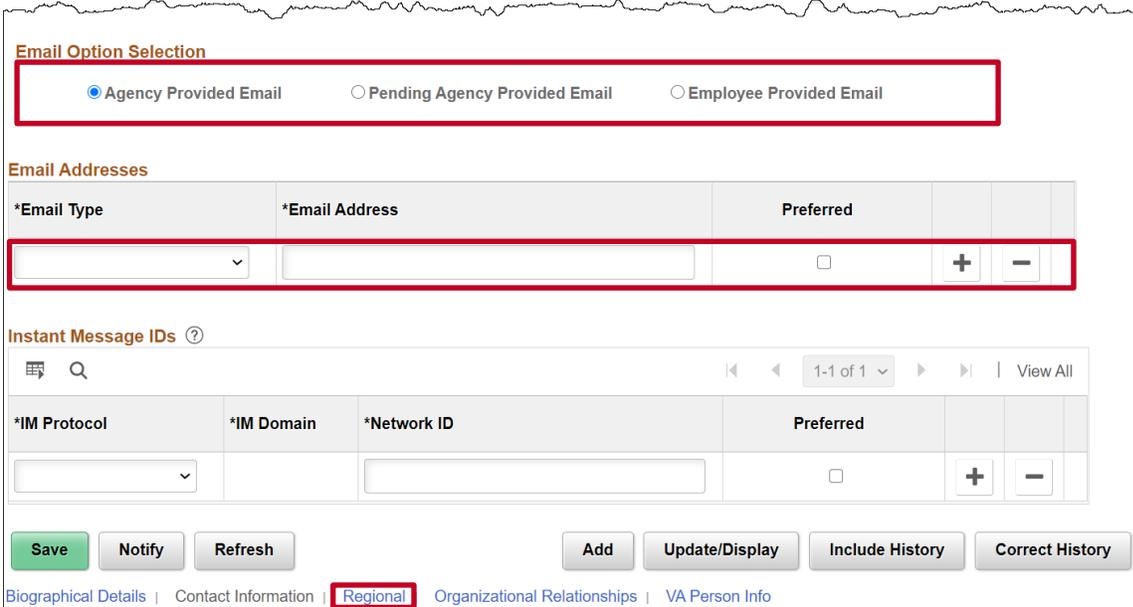
1-1 of 1 | View All

*Phone Type	Telephone	Extension	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+ -	

37. Select the type of phone using the **Phone Type** field dropdown button.
38. Enter the applicable telephone number in the **Telephone** field.
Note: It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.
39. Select the **Preferred** checkbox option if applicable.
40. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (+), and then repeating Steps 37 – 39.
41. Scroll down as needed to the **Email Option Selection** and **Email Addresses** sections.

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



Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
		<input type="checkbox"/>	+	-

Instant Message IDs

1-1 of 1 | View All

*IM Protocol	*IM Domain	*Network ID	Preferred		
			<input type="checkbox"/>	+	-

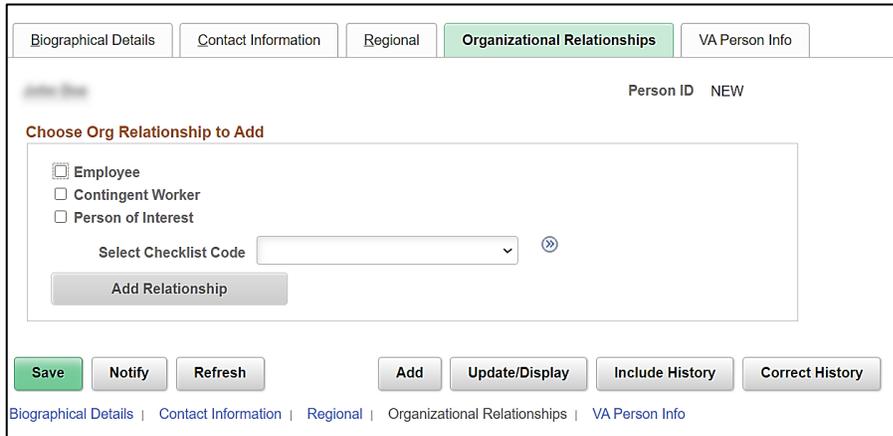
[Biographical Details](#) |
 [Contact Information](#) |
 [Regional](#) |
 [Organizational Relationships](#) |
 [VA Person Info](#)

42. Complete the **Email Option Selection** and **Email Addresses** sections based on the following guidelines. A valid email address is required for the employee to be notified when Benefit Confirmation Statements are ready for review.
 - a. If the employee has been issued a business email:
 - i. Accept the default email option of “Agency Provided Email”
 - ii. Select an email type of “Business” using the **Email Type** field drop-down button
 - iii. Enter the applicable email address in the **Email Address** field
 - iv. Select the **Preferred** checkbox option
 - b. If the employee’s business email has been requested but not yet assigned:
 - i. Select the “Pending Agency Provided Email” email option by clicking the corresponding radio button option
 - ii. Select an email type of “Business” using the **Email Type** field drop-down button
 - iii. Enter Noemail@virginia.gov
 - iv. Select the **Preferred** checkbox option
 - c. If a business email will not be provided to the employee:
 - i. Select the “Employee Provided Email” email option by clicking the corresponding radio button option
 - ii. Select an email type of “Personal” using the **Email Type** field drop-down button
 - iii. Enter the applicable email address in the **Email Address** field
 - iv. Select the **Preferred** checkbox option

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43. Click the **Organizational Relationships** tab at the top of the page.

The **Organizational Relationships** tab displays.



Note: Localities do not utilize the Regional or VA Person Info tabs.

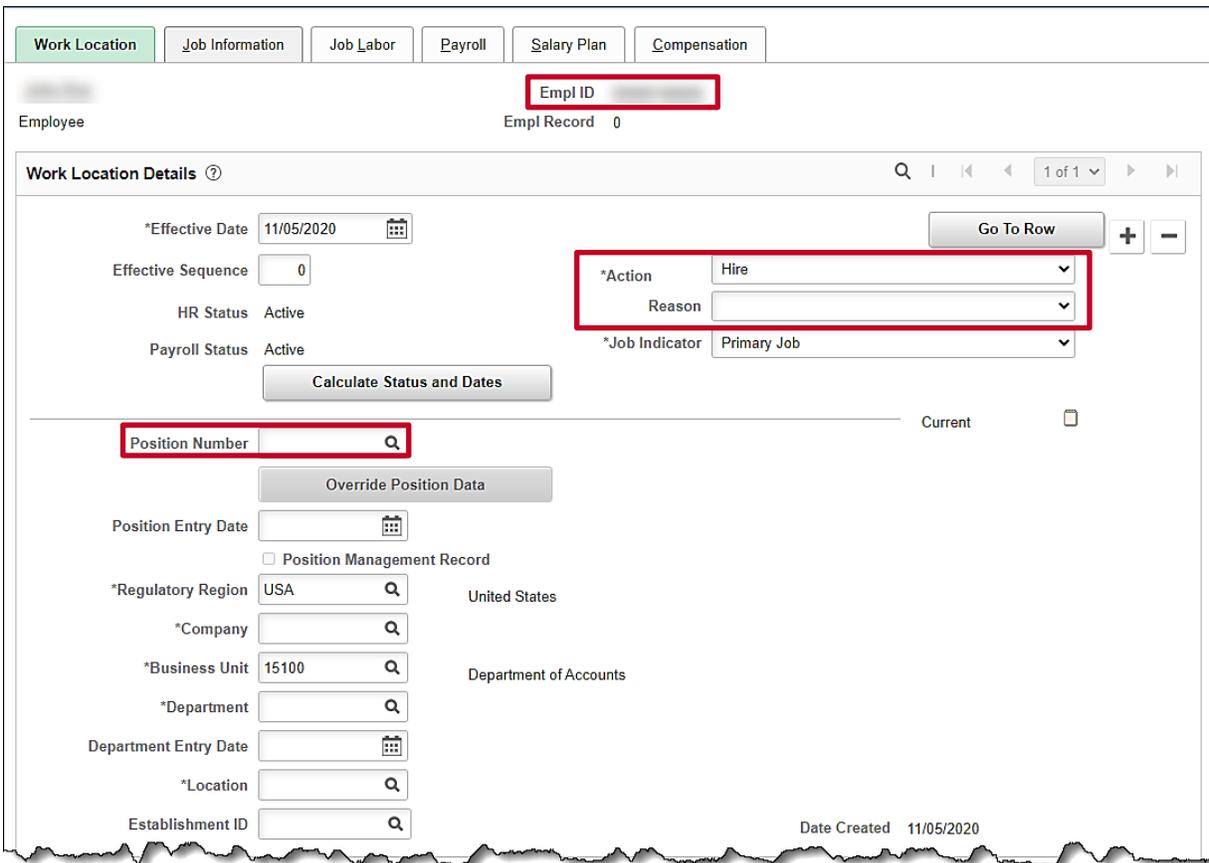
44. Select the **Employee** checkbox option.

45. Click the **Add Relationship** button.

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The new employee's **Job Record** page displays with the **Work Location** tab displayed by default.

Note: The Employee ID number that was automatically assigned by the system is now showing.



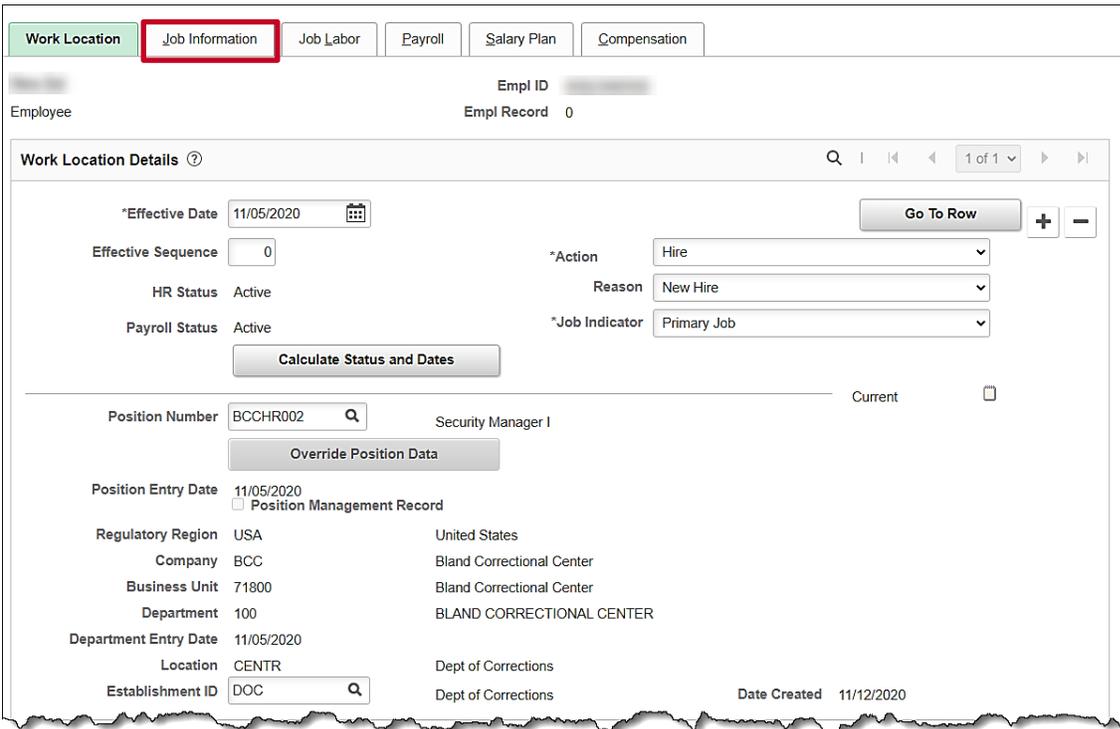
46. The **Effective Date** field defaults to the date entered on the **Personal Information** page. This is a required field. Validate that this date is the first date of employment for the employee (correcting if necessary) prior to saving the job record. A help desk ticket request is required to adjust the new employee's effective date after their job record is created and saved.

Note: For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

47. The **Action** field defaults to "Hire"; no other selections are available.
48. Select "New Hire" in the **Reason** field using the dropdown button.
49. Select the applicable pooled position for the employee using the **Position Number Look Up** icon.

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The **Work Location** tab refreshes and auto-populates based off the selected Position Number.



Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Work Location Details (1 of 1)

*Effective Date: 11/05/2020 + -

Effective Sequence: 0 *Action: Hire

HR Status: Active Reason: New Hire

Payroll Status: Active *Job Indicator: Primary Job

Position Number: BCCHR002 Security Manager I

Position Entry Date: 11/05/2020 Position Management Record

Regulatory Region: USA United States

Company: BCC Bland Correctional Center

Business Unit: 71800 Bland Correctional Center

Department: 100 BLAND CORRECTIONAL CENTER

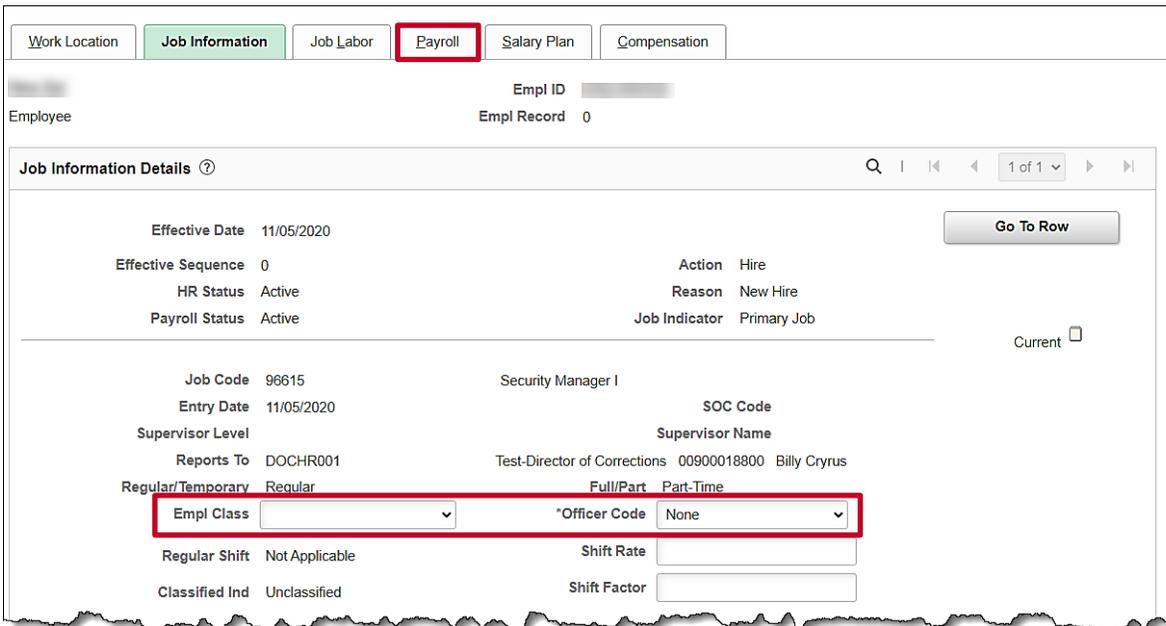
Department Entry Date: 11/05/2020

Location: CENTR Dept of Corrections

Establishment ID: DOC Dept of Corrections Date Created: 11/12/2020

50. Click the **Job Information** tab.

The **Job Information** tab displays.



Work Location | **Job Information** | Job Labor | **Payroll** | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Job Information Details (1 of 1)

Effective Date: 11/05/2020

Effective Sequence: 0 Action: Hire

HR Status: Active Reason: New Hire

Payroll Status: Active Job Indicator: Primary Job

Current

Job Code: 96615 Security Manager I

Entry Date: 11/05/2020 SOC Code

Supervisor Level: Supervisor Name

Reports To: DOCHR001 Test-Director of Corrections 00900018800 Billy Cryrus

Regular/Temporary: Regular Full/Part: Part-Time

Empl Class [Dropdown] *Officer Code: None [Dropdown]

Regular Shift: Not Applicable Shift Rate: [Field]

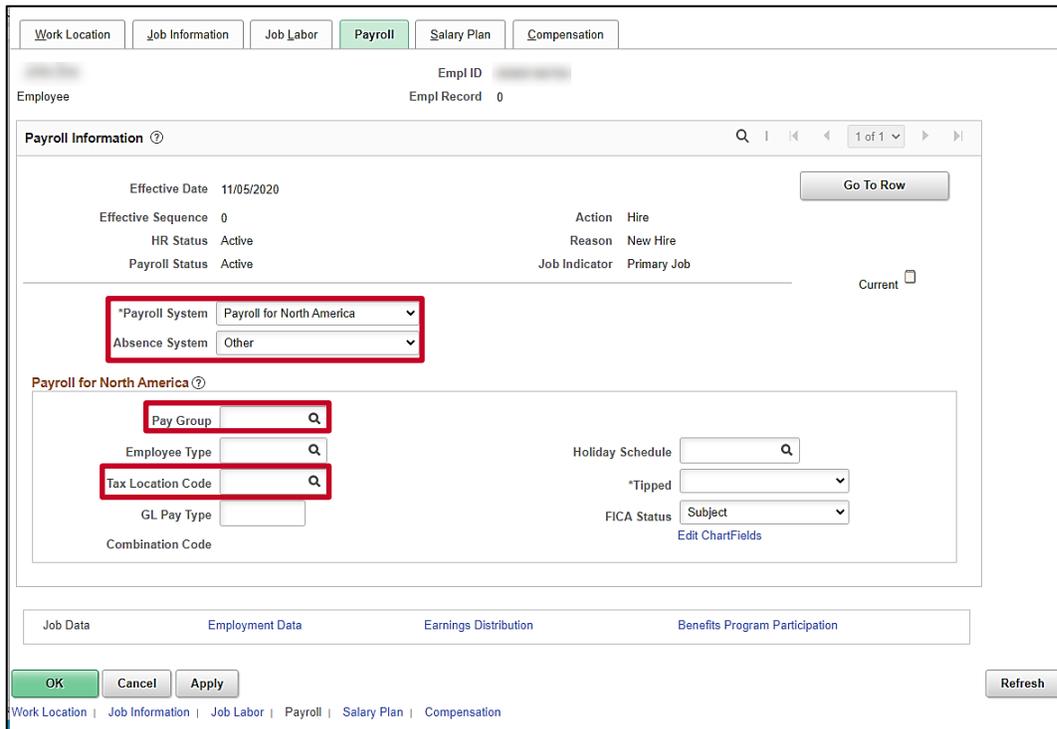
Classified Ind: Unclassified Shift Factor: [Field]

51. Review the information within the **Job Information Details** section.

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52. Select the applicable employee class using the **Empl Class** field dropdown button. This is a required field.
 - a. If the employee is assigned to a TLC position, select the “TLC EE” value.
 - b. If the employee is assigned to an HBO position, select the value that describes the employee filling the job. (i.e., ONC, OTO, etc.).
53. The **Officer Code** field defaults to “None”. Use the drop down to select a validate value.
54. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

The **Payroll** tab displays.



The screenshot shows the 'Payroll Information' form in the Cardinal system. The 'Payroll' tab is active. The form displays the following fields and values:

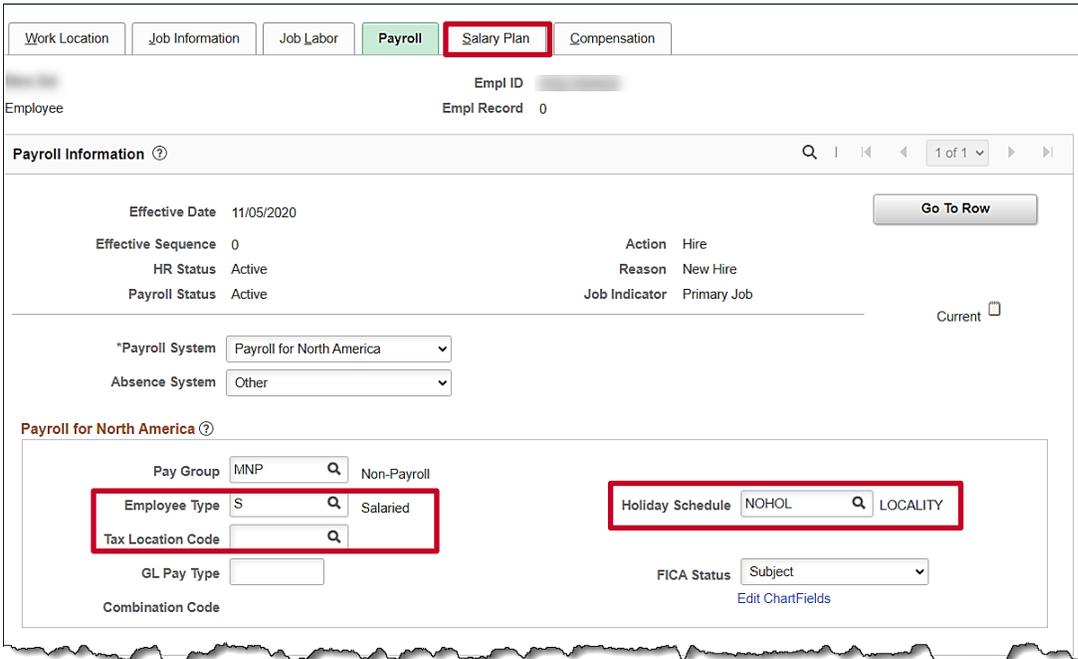
- Effective Date: 11/05/2020
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Action: Hire
- Reason: New Hire
- Job Indicator: Primary Job
- *Payroll System: Payroll for North America
- Absence System: Other
- Pay Group: (highlighted with a red box)
- Employee Type: (highlighted with a red box)
- Tax Location Code: (highlighted with a red box)
- GL Pay Type: (empty)
- Combination Code: (empty)
- Holiday Schedule: (empty)
- *Tipped: (dropdown menu)
- FICA Status: Subject

Buttons at the bottom include 'OK', 'Cancel', 'Apply', and 'Refresh'. Navigation tabs at the top include 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'.

55. The **Payroll System** field defaults to “Payroll for North America”. Do not change.
56. The **Absence System** field defaults to “Other”. Do not change.
57. Select “MNP Non-Payroll” using the **Pay Group Look Up** icon.

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The **Payroll** tab refreshes automatically.



Work Location | Job Information | Job Labor | **Payroll** | **Salary Plan** | Compensation

Employee ID [REDACTED]
Empl ID [REDACTED]
Employee [REDACTED] Empl Record 0

Payroll Information ? 1 of 1 Go To Row

Effective Date 11/05/2020
Effective Sequence 0
HR Status Active
Payroll Status Active
Action Hire
Reason New Hire
Job Indicator Primary Job
Current

*Payroll System Payroll for North America
Absence System Other

Payroll for North America ?

Pay Group MNP Non-Payroll
Employee Type **S** Salaried
Tax Location Code
GL Pay Type
Combination Code
Holiday Schedule **NOHOL** LOCALITY
FICA Status Subject
[Edit ChartFields](#)

58. The **Employee Type** field defaults to “S” (Salaried). Do not change.
59. The **Holiday Schedule** field defaults to “NOHOL”. Do not change.
60. Select the applicable Tax Location Code based on the location of the office using the **Tax Location Code Look Up** icon.
61. Click the **Salary Plan** tab.

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The **Salary Plan** tab displays.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
-------------------------------	---------------------------------	---------------------------	-------------------------	-----------------------------	------------------------------

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Salary Plan Details 1 of 1

Effective Date	11/05/2020	Action	Hire
Effective Sequence	0	Reason	New Hire
HR Status	Active	Job Indicator	Primary Job
Payroll Status	Active		

Go To Row

Salary Admin Plan	UG	↻ Ungraded
Grade		
Step		

Includes Wage Progression Rule

Grade Entry Date
Step Entry Date

Current

Job Data | [Employment Data](#) | [Earnings Distribution](#) | [Benefits Program Participation](#)

OK | Cancel | Apply | Refresh

[Work Location](#) | [Job Information](#) | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

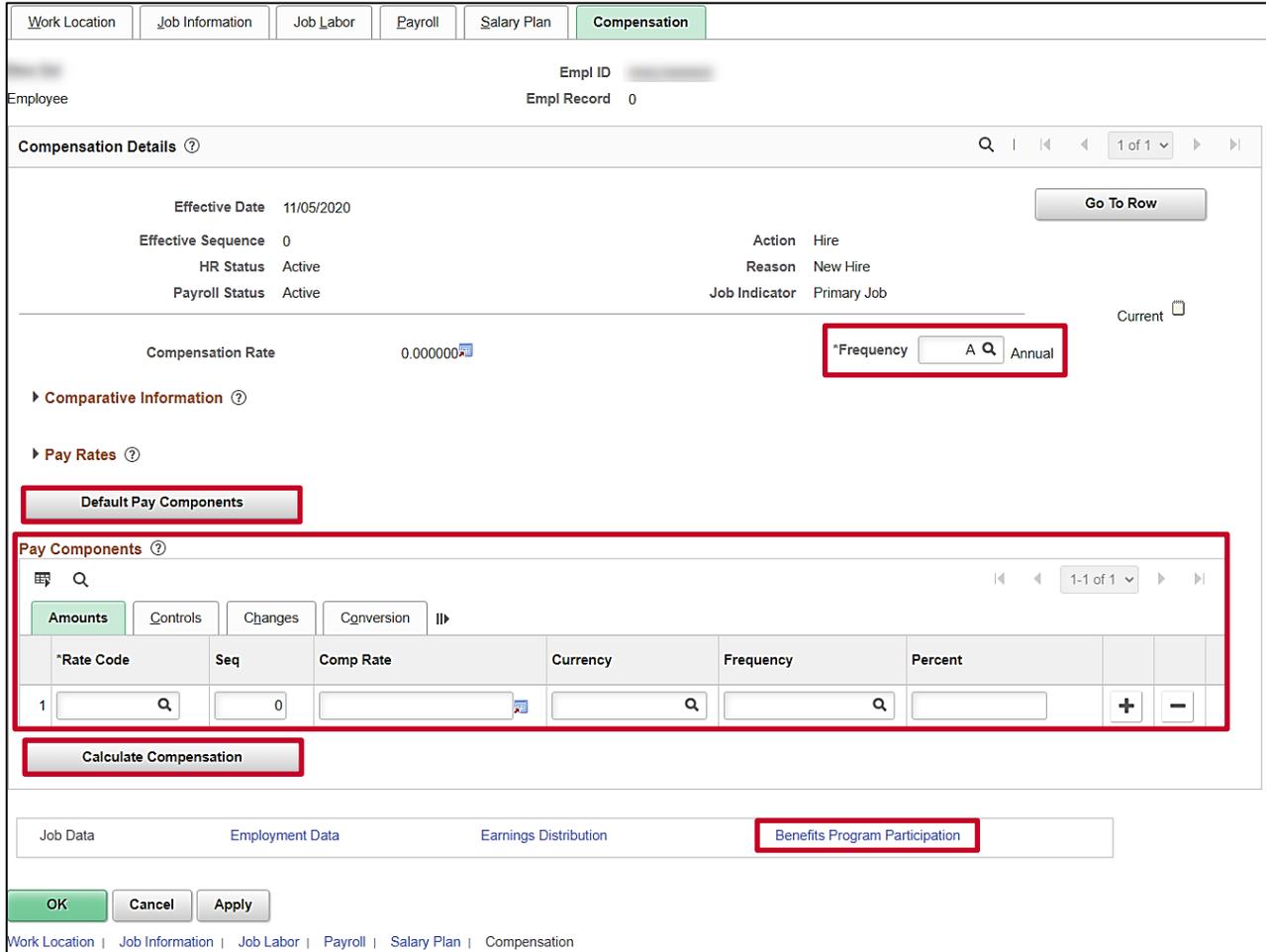
62. Validate that the **Salary Admin Plan** field defaults to “UG” (Ungraded).

Note: If the **Salary Admin Plan** field does not default to “UG”, then the position data may be incorrect. Double-check the position record before proceeding.

63. Click the **Compensation** tab.

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The **Compensation** tab displays.



Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Employee [Redacted] Empl ID [Redacted]
Empl Record 0

Compensation Details ②

Effective Date 11/05/2020 Go To Row

Effective Sequence 0 Action Hire
HR Status Active Reason New Hire
Payroll Status Active Job Indicator Primary Job

Compensation Rate 0.000000 *Frequency A Annual

▶ **Comparative Information** ②

▶ **Pay Rates** ②

Default Pay Components

Pay Components ②

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0					+	-

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | **Benefits Program Participation**

OK | Cancel | Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

64. The **Frequency Code** field defaults to “M” (Monthly). Do not change.
65. Click the **Default Pay Components** button.
66. Select “NAANNL” in the **Rate Code** field using the **Rate Code Look Up** icon within the **Pay Components** section.
67. Enter “0” in the **Compensation Rate** field.
68. The **Currency** and **Frequency** fields default based on the Rate Code entered/selected. Do not change.
69. Click the **Calculate Compensation** button.
70. Click the **Benefits Program Participation** link.

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The **Benefits Program Participation** page displays.

Benefit Program Participation

Employee
Empl ID [redacted]
Empl Record 0

Benefit Status 1 of 1

Benefit Record Number 0
Go To Row

Effective Date 11/05/2020
Action Hire

Effective Sequence 0
Reason New Hire

HR Status Active
Job Indicator Primary Job

Payroll Status Active
Current

*Benefits System Benefits Administration
Benefits Employee Status Active

Annual Benefits Base Rate USD
ACA Eligibility Details

Benefits Administration Eligibility

BAS Group ID

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

Elig Fld 9

Benefit Program Participation Details 1 of 1 | View All

*Effective Date 11/05/2020
Currency Code USD

*Benefit Program PSX
Sys delivered empty Ben Pgm

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

OK
Cancel
Apply

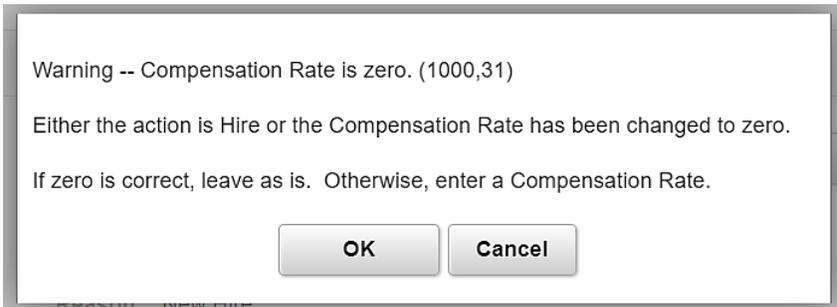
71. Click the **Elig Fld 2 Look Up** icon. This value will be the department number for example: for position A310000P and/or A310000F the Elig Field 2 will be: 047039000 (the department number).
72. Click the **Elig Fld 3 Look Up** icon and select "N" (No).
73. Click the **Elig Fld 8 Look Up** icon and select "12-12".
74. Click the **Elig Fld 9 Look Up** icon and select the applicable benefits payment breakdown. These values represent the nature of the employee and how the employee's health premiums are paid. Scroll to the bottom of the list to see the valid TLC available values.

Note: For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

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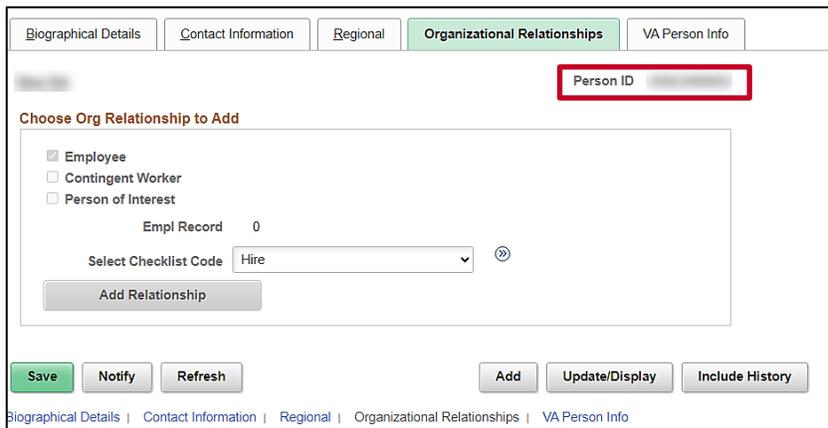
75. Click the **OK** button.

A **Warning** message displays in a pop-up window.



76. Click the **OK** button to close the **Warning** message. A Compensation Rate of zero is correct because payroll is not managed in Cardinal.

The **Organizational Relationships** page returns.

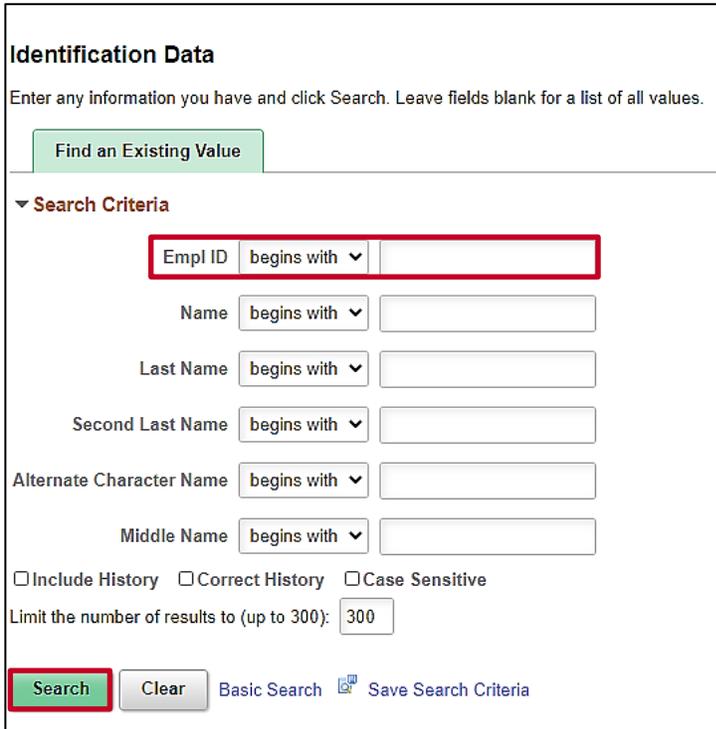


HR352_Completing a New Hire (Benefits Only)**Add Citizenship Value to the Personal Information**

1. Navigator to the Identification Data page using the following path:

Navigator > Workforce Administration > Personal Information > Citizenship > Identification Data

The **Identification Data Search** page displays.



Identification Data

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)

▼ **Search Criteria**

Emp ID begins with ▼

Name begins with ▼

Last Name begins with ▼

Second Last Name begins with ▼

Alternate Character Name begins with ▼

Middle Name begins with ▼

Include History Correct History Case Sensitive

Limit the number of results to (up to 300):

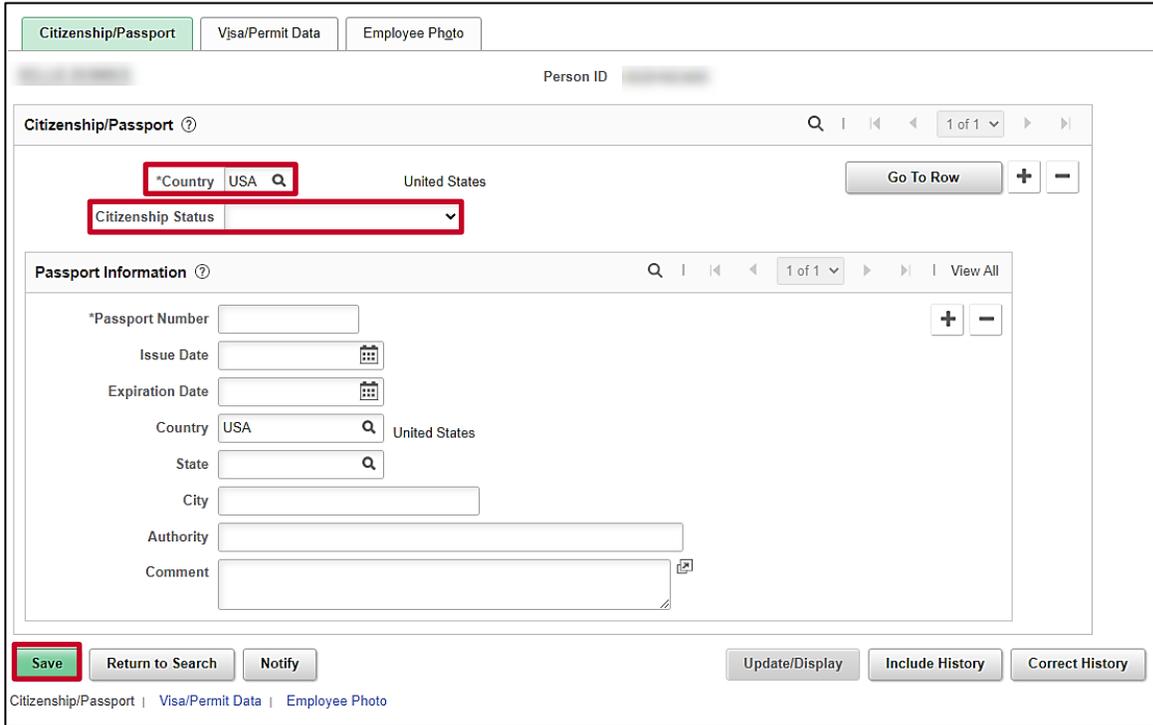
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Enter the applicable Employee ID in the **Emp ID** field.

3. Click the **Search** button.

HR352_Completing a New Hire (Benefits Only)

The **Identification Data** page displays with the **Citizenship/Passport** tab displayed by default.



The screenshot shows a web form with three tabs: "Citizenship/Passport", "Visa/Permit Data", and "Employee Photo". The "Citizenship/Passport" tab is active. At the top, there is a "Person ID" field. Below it, the "Citizenship/Passport" section has a search bar and a "Go To Row" button. The "Country" field is set to "USA" and is highlighted with a red box. Below it, the "Citizenship Status" field is a drop-down menu, also highlighted with a red box. The "Passport Information" section contains several fields: "*Passport Number", "Issue Date", "Expiration Date", "Country" (set to "USA"), "State", "City", "Authority", and "Comment". The "Save" button at the bottom left is highlighted with a red box. Other buttons include "Return to Search", "Notify", "Update/Display", "Include History", and "Correct History".

4. Click the **Country** drop down. Select "**USA**". This field must always be USA as this field references the country of employment.
5. Select the employee's citizenship status using the **Citizenship Status** field drop-down button. If citizenship status is unknown at the time of hire, select the option of **Not Indicated**. **Do not leave this field blank.**

Note: For additional information on the Citizenship Information, see the Job Aid titled **HR351_Maintaining Employee Citizenship Information** job aid. This Job Aid can be found on the on the Cardinal website in Job **Aids** under **Learning**.

6. Click the **Save** button.