



# Cardinal HCM Core User Support Guide

**Question/issue while using Cardinal? Follow the guidance below for finding a solution!**

1. Use this guide for support. Click [here](#) to narrow down support options by functional area.
2. If you can't find the solution in this guide, visit the Cardinal website and leverage [Job Aids](#), [Course Materials](#), and [Forum recordings](#).
3. Can't solve your issue with the materials on the Cardinal website? Contact your agency support resources\* for further guidance. Some agencies have specific support for functional areas.
4. Policy issue? Need additional support? Contact [iHelp, OHB, SPO, or Cardinal PPS \(via VCCC\)](#) depending on the issue

## Tips for using this guide

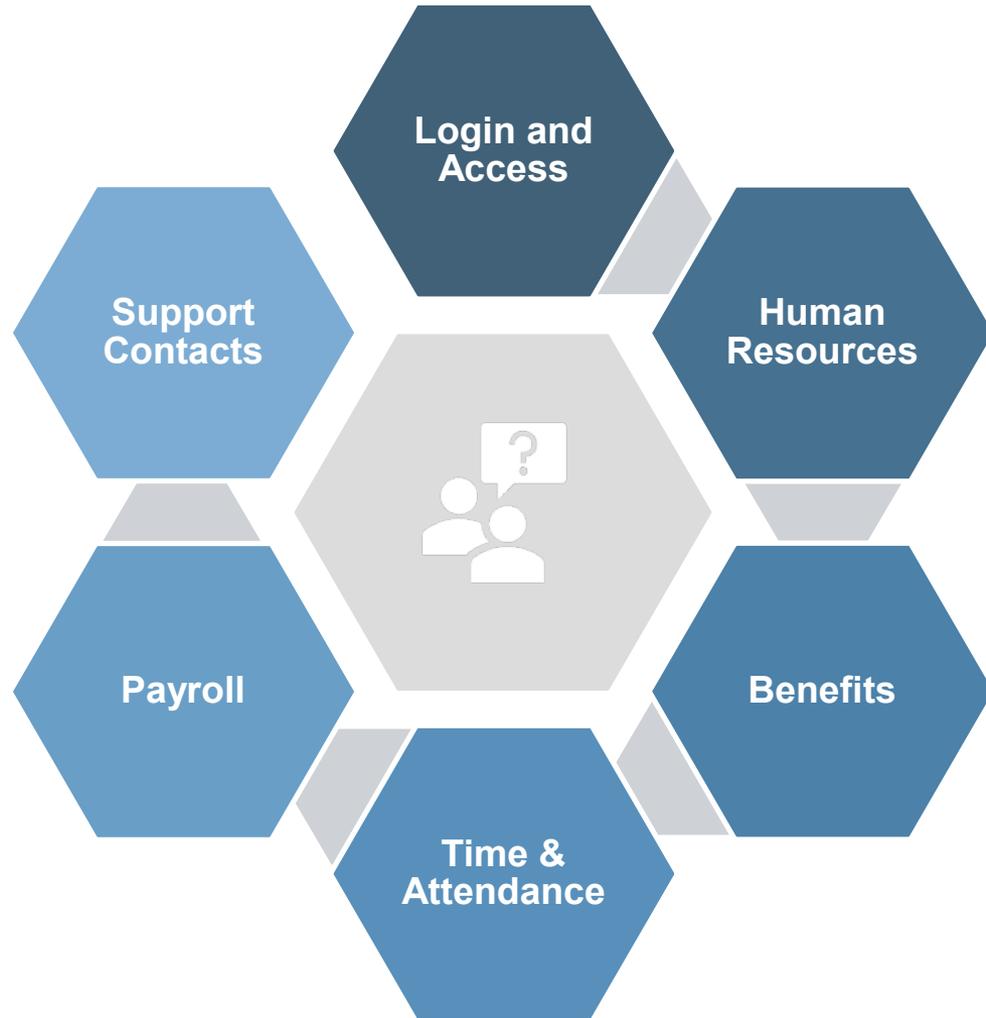
- Go to the [next page](#) to select the area you need support on and use the buttons in these graphics to navigate throughout the guide
- This guide is not comprehensive of all questions/issues. The [Cardinal website](#) if your best resource to find the answers you need!





# Cardinal HCM Core User Support Areas

Click on the title to take you to the respective section.





# Login and Access

Cardinal can be accessed over public internet using [my.cardinal.virginia.gov](https://my.cardinal.virginia.gov).

- Using Cardinal for the first time or need sign-on help? Use the [Cardinal Portal page](#) for support.

## Core Users

Cardinal Core user access is granted based on specific work that you, as an employee, needs to perform in the system and the associated security roles set up your agency.

- Your agency's HR Admin should ensure a valid agency provided email address is listed on your personal data record in Cardinal in order to access/log into Cardinal.
- You should **always** reach out to and coordinate with your [Cardinal Security Officer](#) for questions and issues related to accessing Cardinal.



**Important:** To learn more about the required or available training for Cardinal HCM, please refer to the Cardinal [HCM Training Resources](#) document.

Note: As a Core user, you will need to access the Cardinal application **every 90-days** or your Core system access will be removed. If you are an employee, you will retain your ESS access.



Our most common HR related questions/issues and additional tips for our Core HR users.

Question/Issue	Support Documents/Steps	Additional Tips from the Cardinal Team
<b>New Hire, Rehire Termination, and/or Transfer</b>	<p>Check out the following job aids:</p> <ul style="list-style-type: none"> <li>• <a href="#">HR351_Completing a New Hire</a></li> <li>• <a href="#">HR351_Completing a Rehire</a></li> <li>• <a href="#">HR351_Separation Statuses</a></li> <li>• <a href="#">HR351_Managing an Inter-Agency Transfer</a></li> <li>• <a href="#">HR352_Completing a New Hire (Benefits only)</a> – for our HBOs and Localities!</li> </ul>	<p>When completing a <b>new hire</b>, confirm the employee does not already exist/have personal data in Cardinal HCM. Refer to the <a href="#">HR351_Employee Search Match</a> job aid if you are not sure how to do this!</p> <p>It is critical to complete hires/transfers/terms timely – the employee will be negatively impacted (access, pay, and benefits) if this is not completed quickly and correctly!</p>
<b>Action/Action Reason Codes</b>	<p>Check out the following job aids:</p> <ul style="list-style-type: none"> <li>• <a href="#">HR351_Action Reason Codes</a> (excel document)</li> </ul>	<p>The Action/Action Reason combination determines which fields on job can be updated and can impact Benefits, Time &amp; Attendance, and Payroll.</p>
<b>Employee Class</b>	<p>Check out the following job aid:</p> <ul style="list-style-type: none"> <li>• <a href="#">HR351_Employee Class Overview</a> (excel document)</li> </ul>	<p>Employee Class is used for grouping certain employees for reporting/classifications and used in the Benefits and Time &amp; Attendance modules.</p>
<b>Additional Pay</b>	<p>Follow the <a href="#">HR351_Processing Additional Pays</a> job aid.</p>	<p>If you've already made updates to Additional Pay data and need corrections, you must <a href="#">Submit a Ticket</a> to the Cardinal PPS team and provide detailed correction information.</p>
<b>Effective Dating</b>	<p>Review the <a href="#">HR351_Overview of Effective Dating</a> job aid <b>and</b> the <a href="#">HR Administrator Forum</a> that covered Effective Dating.</p>	<p>This is the most common issue in Cardinal HCM and has <b>many</b> downstream impacts!</p>



**Important:** For questions about HR policy (e.g., which dates to use), remember to reach out to iHelp at [ihelp@dhrm.virginia.gov](mailto:ihelp@dhrm.virginia.gov)! Click [here](#) for additional guidance on iHelp support.



# Benefits Administration

Do you have Benefits Administration related questions/issues? See below for common resolution steps and some additional tips from our experts at Cardinal!

Question/Issue	Support Documents/Steps	Additional Tips from the Cardinal Team
<b>Approving Dependents</b>	Review the <a href="#">Benefits Administrator forum</a> , which covers approving a dependent.	The Benefits Eligibility Audit (Navigation: Benefits > Reports > Audits > Benefit Eligibility Audit) allows you to monitor outstanding dependents that need approval and is a great resource for this process! Refer to the <a href="#">Cardinal HCM Benefits Reports Catalog</a> to learn more.
<b>Transfers – health benefits related data issues</b>	Reach out to your HR Administrator to confirm the transfer has been completed.	It is important for the HR Administrators to complete hires/transfers/terms timely. When an employee transfers their benefits will be terminated from the sending agency and the receiving agency Benefits Administrator is responsible for re-establishing the benefits.
<b>ORP Retirees</b>	Review our <a href="#">BN361_ORP Retiree Guide</a> .	This process is tricky, as it requires coordination between HR and BN Admins! The ORP guide notes which roles can complete which part of the process.
<b>Health Benefits Summary</b>	The most efficient and effective way to look at/understand an employee’s health benefits information is to use the Current Benefits Summary page. Review the <a href="#">Viewing Employee/Retiree Benefits</a> job aid for more details.	This job aid is a helpful resource for navigation and health benefits summary related information for Core users to support their employees.



**Important:** For health benefits related policy questions or other how-to questions, remember to reach out to the Office of Health Benefits (OHB) at [ohb@dhrm.virginia.gov](mailto:ohb@dhrm.virginia.gov)! Click [here](#) for additional guidance on OHB support.



# Time & Attendance

If you support time entry from an administrative standpoint, review the following Time & Attendance related questions/issues.

Question/Issue	Support Documents/Steps	Additional Tips from the Cardinal Team
<b>Timesheet Access</b>	Review the <a href="#">Employee Timesheet Access and Inter-Agency Transfers</a> communication for guidance on timesheet access.	Most often, when an employee who should enter their own time cannot modify their timesheet, the resolution is to update Elig Config 3. All TA Core users have access to review employee setup information on the Job Data pages in Cardinal, but you will need to work with your HR Administrator to make changes, if needed!
<b>Leave/Absence Balances</b>	Check out the following job aids and communications: <ul style="list-style-type: none"> <li>• <a href="#">Time Entry and Absence Reminders</a> communication</li> <li>• <a href="#">TA374 Managing Absence Balances</a></li> </ul>	The agency’s Absence Management (AM) Administrator is the appropriate point of contact for employees leave/absence questions. Use the documents listed for assistance!  If your agency is a Payroll Service Bureau (PSB) contracted agency, reach out to your HR Administrator to coordinate with PSB AM Administrators.
<b>“Reports To” Issues</b>	Review the <a href="#">Time &amp; Labor Administrator Forum</a> for the Reports To guidance.  Review the <a href="#">TA373 Approving Time and Absences</a> job aid.	Accurate “Reports To” setup is critical for time approvals. All TA Core users have access to review the Reports To field on the Job Data pages; however, you’ll need to work with your HR administrator for any corrections or changes.
<b>Supervisor Training</b>	New supervisors need to take one of the <a href="#">TA373: Time &amp; Attendance for Managers and Supervisors</a> web-based trainings (WBTs) depending on your agency’s use of Cardinal Absence Management.  Already took WBT training? Need a refresher? See the <a href="#">TA Tutorials</a> (for ESS or Core users).	Coordinate with your <a href="#">Cardinal Security Officer</a> to confirm you have the correct roles assigned and with your HR Administrator to confirm your Reports To structure is set up correctly!  As a supervisor, you must provide key information, including time reporter type (i.e., Positive or Exception), use of ChartFields, and other agency specific processes, to your employees who enter their own time.



# Payroll



Check out a few of our most common Payroll related questions/issues, resolution steps, and some additional tips from our experts at Cardinal!

Question/Issue	Resolution Steps	Additional Tips from the Cardinal Team
<b>Payroll Calendar</b>	<ul style="list-style-type: none"><li>Review the <a href="#">Payroll Administrator forum</a> recording</li><li>Review the <a href="#">SPO website</a> for up-to-date information on the Payroll Calendars</li></ul>	The <a href="#">Payroll Administrator forum</a> walks PY Administrators through the Payroll Calendar and associated activities and can be a helpful resource for related terminology.
<b>SPOT Transactions</b>	<ul style="list-style-type: none"><li>Review the <a href="#">PY381 Using the Single Use Payroll Online Tool (SPOT)</a> job aid</li><li>Review the <a href="#">PY381 Extended Leave Processing</a> job aid</li></ul>	SPOT transactions are one of the most common activities for a PY Administrator. Remember, you can use the <a href="#">SPOT Deduction and/or Earnings templates</a> for a quicker/easier way to upload! Haven't used an upload before? Make sure to read the Template SPOT Upload Process section in the job aid.
<b>Payroll Reporting</b>	<ul style="list-style-type: none"><li>The <a href="#">PY381 Agency Payroll Management Course Materials</a> contains great information on Payroll reports along with guidance on when to run them.</li><li>Review the <a href="#">Cardinal HCM Payroll Reports Catalog</a> for detailed information on each report.</li></ul>	There is a handy crosswalk posted to the <a href="#">SPO website</a> to assist with payroll reporting!



**Important:** For payroll related policy questions (e.g., timing of payroll confirmation), remember to reach out to State Payroll Operations (SPO) at [payroll@doa.virginia.gov](mailto:payroll@doa.virginia.gov)! Click [here](#) for additional guidance on SPO support.



# Support Contacts for Core Users

The Cardinal team partners with iHelp, OHB, and SPO to provide comprehensive support for end users. Follow the guidance below to understand the types of questions and support each group can provide!

Who should I go to for help?	iHelp	OHB	SPO	Cardinal PPS
<b>Types of questions</b>	Human Resource policy related questions/issues and how-to questions	Health Benefit policy related questions/issues and how-to questions	Payroll policy and procedures related questions/issues	System issues or corrections needed
<b>Example questions</b>	<p>What dates should I use for this STD claim?</p> <p>How can I make an adjustment to the dates for a VSDP claim?</p>	<p>What health benefit coverage code do I select for an employee and their child, but no spouse?</p> <p>How do I submit a marriage life event to adjust my health benefits?</p>	<p>When is payroll confirmation for this pay period?</p> <p>What is the cutoff date for timesheet submissions?</p> <p>How do I set up tax data for an employee not working in Virginia? Or for an employee who resides in another state and the state is not set up in Cardinal?</p>	<p>I received the attached error message on the timesheet page when entering a prior period adjustment. How do I fix this error to save my timesheet?</p> <p>I need to correct the effective date for an employee.</p>
<b>How to contact</b>	<a href="mailto:iHelp@dhrm.virginia.gov">iHelp@dhrm.virginia.gov</a>	<a href="mailto:ohb@dhrm.virginia.gov">ohb@dhrm.virginia.gov</a>	<a href="mailto:payroll@doa.virginia.gov">payroll@doa.virginia.gov</a>	<a href="#">Submit a Ticket</a>
<b>Support websites</b>	<a href="#">DHRM Website</a> <a href="#">HR Policies</a> <a href="#">DHRM Publications</a>	<a href="#">Health Benefits Contact Information</a>	<a href="#">SPO Website</a> <a href="#">Payroll Bulletins</a> <a href="#">CAPP Manual</a>	<a href="#">Cardinal Website</a> <a href="#">Cardinal Communications</a>