



Procedural Guidance for On-Boarding Appointees in State Agencies

Action Step	Initiated By	Point of Contact	Guidance
Appointment Notification	Governor's Office	Agency HR Director	Letter received from the Governor's Chief of Staff advising of appointment to the agency – usually directed to the HR Director
Position Creation	Agency HRD	Agency HR Director	- If a vacant position is not currently available, create a position in Cardinal HCM - To ensure consistency across agencies please use the critical data elements listed below - Funding for the position is typically absorbed within the Agency's budget
Position Description	Governor's Office	Director of Executive Administrative Services, Secretary of Administration Office	- May be determined by the Cabinet Secretary - Review Agency Head duties mandated in Code of Virginia - Be prepared to work with the Agency Head or the Cabinet Secretary to develop or modify a work plan
On-Boarding Process	Agency HRD	Agency HR Director	- Review the Handbook for At Will Employees and the Executive Leave program. (Note: This document is subject to change with a new administration) - Facilitate the completion of employment on-boarding documents to include but not limited to: - State and Federal Tax Withholding Forms - I-9 Form and E-Verify - Emergency Contact - Selection of VRS Plan – ORPPA or VRS (check with the VRS if the individual has prior state/local service) - Health Insurance Enrollment

			• Life Insurance and Optional Life • State Employee Badge/Parking • Policy Reviews and respective receipts (such as Handbook for At Will Employees, DHRM Policies 1.05, 1.75 and 2.35) • State and Agency required training (DHRM Required Training for 2025) • Provide an updated agency organizational chart, staff directory, mission statement, strategic plan, program information, and workforce demographics • Process criminal background check as required by your agency • Inform Agency Head of Statement of Economic Interests requirements and training • Facilitate introductions and a tour of the facility, explain Agency procedures and policies and send a welcome announcement/introduction to all staff • Key record into Cardinal HCM and create/maintain a personnel record • Within six months of employment, Agency Heads should participate in the Agency Head training as provided on DHRM's website. • For Appointees reappointed to another agency or for those Appointees transferring from a salaried position, follow the Cardinal HCM guidance on the separation and rehire process found in the HR351 Managing an Interagency Transfer job aid. Seek assistance as needed from DHRM or Cardinal PPS, if applicable, for transfers from classified or other appointee positions to retain state begin date for instances when there is no break in service.
Link to Executive Resources on DHRM's website			

Cardinal HCM Critical Data Elements

Please ensure the At Will positions include the following data in the listed data elements even for agencies that do not use Cardinal as their primary HRIS.

Data Element	Entries
Position Number	XXX00001: Begins with the HCM three-digit Company code that represents the Agency followed by the five-digit position number.
Role Classification	- Agency Head - 00+Agency Number - Chief Deputy – 91221 - Confidential/Policy Assistant – 91222 - Cabinet Deputy Secretary – 92001 - Special Assistant – 92088 or W92088
Employee Class	- Agency Head - Other Official - Wage
Stmnt of Economic Interests (SOEI)	Enter “Y”
VPA Covered	N
EEO-4 Job Category	1 = Officials and Administrators
SOC Code/Extension	This field is required for Agency Head. SOC is 11-1011 SOC field is optional for Other Official (OTO)
Supervisor Level	M = Manager
Appointed Category	- Governor Appointed - Elected Official (as appropriate) - Board Appointed (as appropriate) This field is used to track and report appointment types
Salary Admin Plan	- AH: Agency Head - UG: Other Official (OTO) WG: Wage
Salary Grade	- Agency Head: Defaults from the job code as designated on the Salary grade table and correlates with Job Code. This will be the three-digit agency number (Ex: 129 for DHRM) - Other Official: UG (ungraded) salary plan Wage: WG (wage) salary plan
FLSA Status	Professional = Exempt
Alternate Leave Plan (Formerly Card Leave Plan)	Non-Cardinal TA Agencies: Alternate Leave Plan field must be completed based on employee’s leave program (i.e. VSDP Elig Group) in order for employee to have a complete Total Compensation statement in Cardinal Employee Self-Service (ESS) Please partner with DHRM and Cardinal PPS if approved by Chief of Staff to remain in the Classified leave plan (only for Appointees moving from classified positions with no break in service)

Department (Formerly Card Dept)	Maximum 10-digit numeric code that indicates the position's department. Enter the Cardinal Department Number (Consult with Agency Finance/Budget)
Reports To (Formerly Card Approver)	Enter HRD Position Number for Agency Head and the respective position number of the appropriate agency supervisors for Chief Deputy and Confidential/Policy Assistant. Used to establish reporting relationships. Integrates with Cardinal FIN. This impacts Time and Attendance Approvals.
Eligibility Group (Absence Mngmt)	Enter: EXCELGGRP for Executive Eligibility Group Assign to Gubernatorial Appointees ("At-will") in the Executive Leave program eligible for VSDP personal and sick leave entitled annually; not Vacation (annual leave) which is accrued semi-monthly
Absence System (Absence Mngmt)	Agencies determine how to track absences for At-Will/Appointee/Agency Head employees. (AHD or OTO) Enter: Absence Management System if the Appointee wishes to track their leave in Cardinal.