

Separation Statuses Overview

The Separate Employee business process captures an employee's departure from an agency and, in some instances, the end of state service. Separation may be classified as voluntary (e.g., retirement, resignation) or involuntary (e.g., disciplinary action, Temporary Workforce Reduction (TWFR), layoff). This business process is applicable to both state agencies and localities in The Local Choice (TLC) program. The Layoff Process will not be covered in this Job Aid. For further information on the Layoff Process, see the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The employee, Agency head, Supervisor, or Legislation can initiate communication to the appropriate Agency HR staff for a separation. The type of separation determines the required documentation that should be submitted to the Agency HR. The Agency must utilize agency-specific systems or paper forms to route requests through Agency external approval process before entering in the separation into Cardinal.

Prior to beginning this process, review the Job Aid titled **HR351 Using the Termination Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The two types of **Separations** covered in this Job Aid are:

Involuntary

- Standards of Conduct,
- Unsatisfactory Performance during Probationary Period,
- and Inability to Perform Duties.

Voluntary

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

Action/Action Reasons are used to reflect the type of separation. In Cardinal, both Voluntary and Involuntary Separations use the Action of "Termination" or "Retirement"; HR staff must reference the applicable Action Reason to identify correct cause of separation.

All HR modules are updated appropriately after the Termination transaction is saved:

- Benefit status is updated in Cardinal Benefits (BN); COBRA eligibility is triggered if applicable.
- Time Reporter is updated for Cardinal TA. Productive and Non-productive time can still be entered and approved prior to the effective date of the Separation. The updated HR status will stop leave accruals.
- The updated Payroll status will not create a paysheet for the employee.

Separation Statuses (continued)

Agency HR must coordinate with Agency Payroll and Agency Benefits Administrator (BA) for final pay, (e.g., salary, OT, leave payout) due the employee. Additional steps may be needed to create Paysheet in order to make the final payments. If there is a large volume of updates, the agency can submit a file to be uploaded using the mass upload process. For further information on Mass Updates, see the Job Aid titled **HR351 Managing the Mass Upload Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Note: Once Cardinal HCM goes live, any employees terminated within Cardinal HCM from that point forward, will automatically have limited Employee Self-Service (ESS) access for 1.5 years after termination (e.g., viewing W-2). Retired employees will also have access to Cardinal. In order for a Terminated or a Retired employee to log into Cardinal, a valid personal email address is required on the Personal Data record in Cardinal.

Note: For Separations related to Involuntary terminations, refer to **DHRM Policy 1.45** and **1.60**.

Note: For Separations related to terminating an employee once Severance benefits end, refer to **DHRM 1.57**.

Note: For Separations related to Long Term Disability, refer to **DHRM Policy 4.57**.

When terminating an employee, the Agency BA will need to process the termination of benefit elections for the Terminated employee. See the **Job Aid** titled **BN361 Quick Reference Guide** section **Processing Benefit Elections: Transfer Out / Termination Employees** for more details. This job aid is located on the Cardinal website in **Job Aids** under **Learning**.



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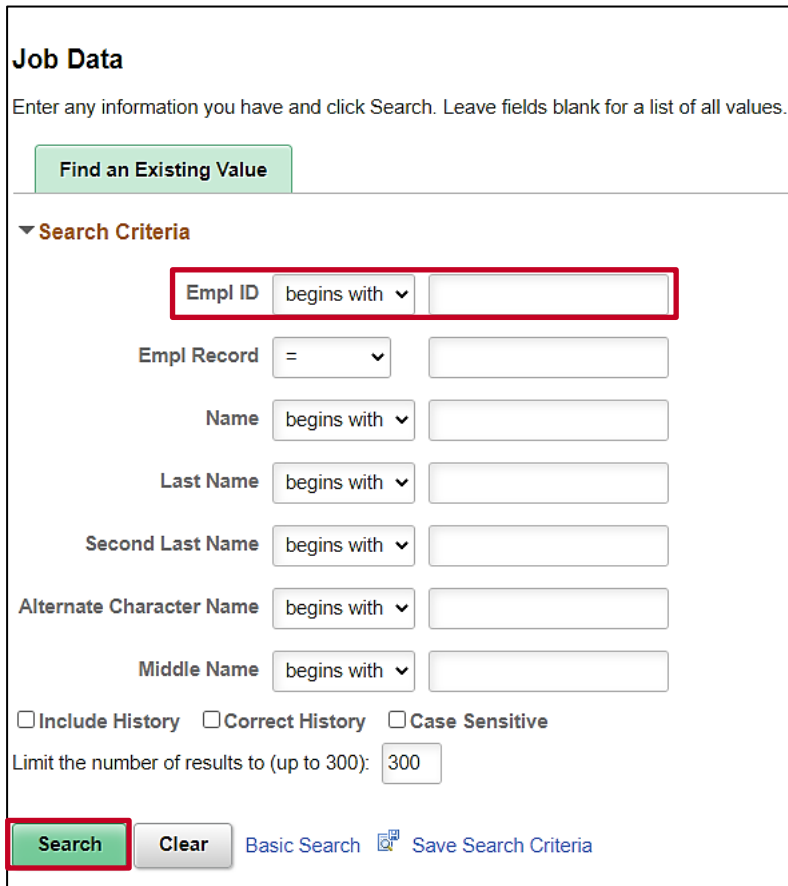
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Termination – Voluntary

1. Navigate to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

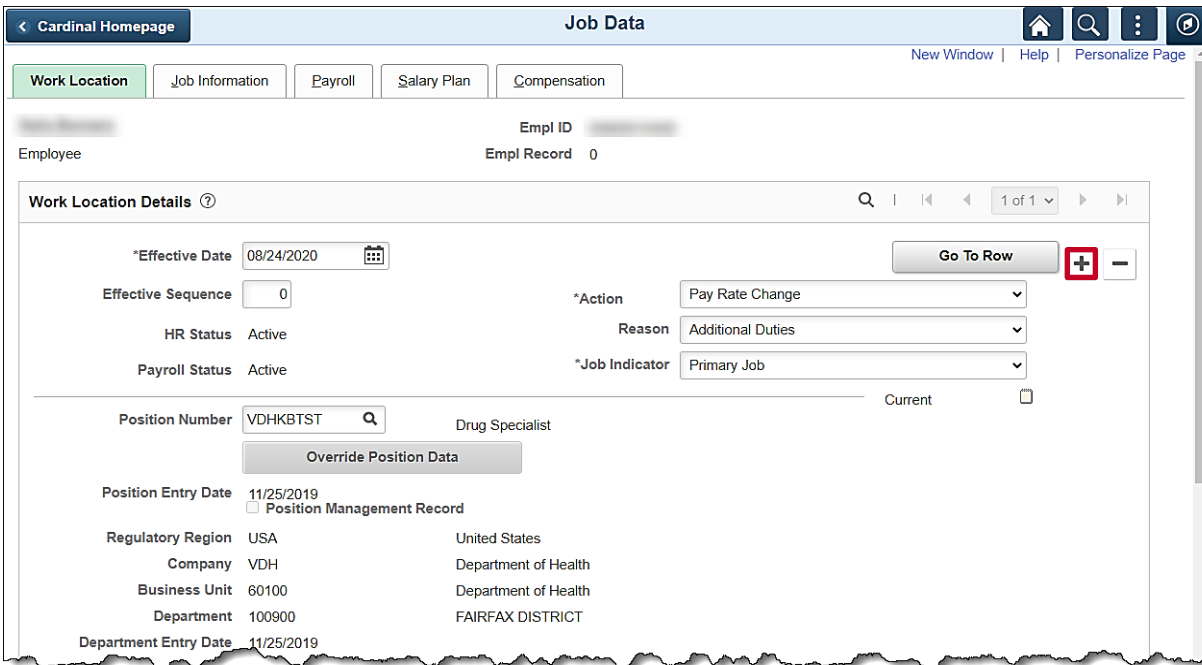


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID [redacted] Empl Record 0

Work Location Details 1 of 1

*Effective Date 08/24/2020 Go To Row + -

Effective Sequence 0 *Action Pay Rate Change

HR Status Active Reason Additional Duties

Payroll Status Active *Job Indicator Primary Job

Position Number VDHKBTST Drug Specialist

Override Position Data

Position Entry Date 11/25/2019 Position Management Record

Regulatory Region USA United States

Company VDH Department of Health

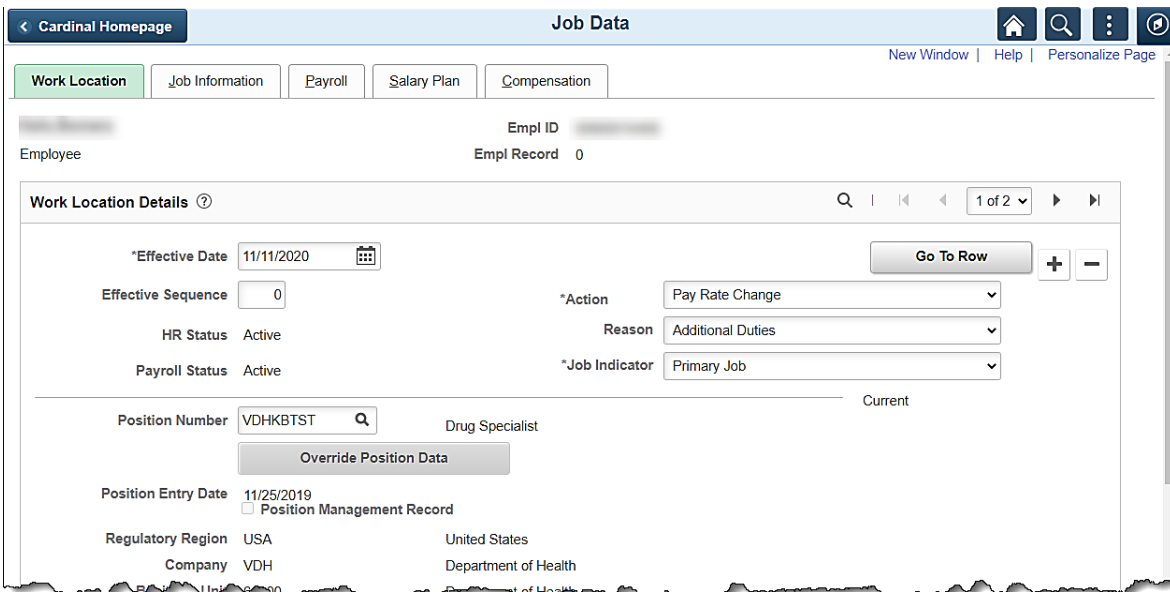
Business Unit 60100 Department of Health

Department 100900 FAIRFAX DISTRICT

Department Entry Date 11/25/2019

4. Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.



Cardinal Homepage Job Data

Work Location Job Information Payroll Salary Plan Compensation

Employee Empl ID [redacted] Empl Record 0

Work Location Details 1 of 2

*Effective Date 11/11/2020 Go To Row + -

Effective Sequence 0 *Action Pay Rate Change

HR Status Active Reason Additional Duties

Payroll Status Active *Job Indicator Primary Job

Position Number VDHKBTST Drug Specialist

Override Position Data

Position Entry Date 11/25/2019 Position Management Record

Regulatory Region USA United States

Company VDH Department of Health

Business Unit 60100 Department of Health

Department 100900 FAIRFAX DISTRICT

Department Entry Date 11/25/2019

Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

Note: Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll)

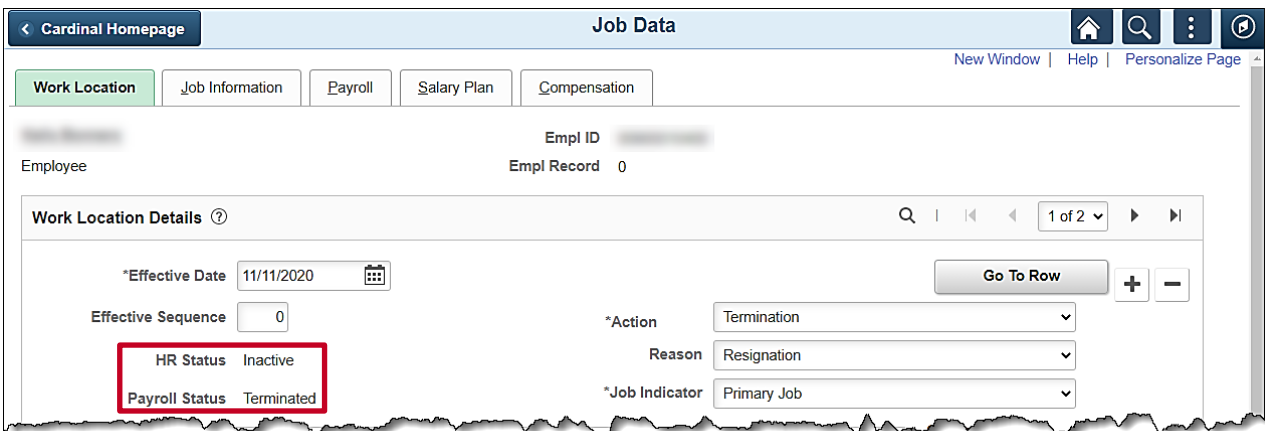
If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. Select the "**Termination**" option using the **Action** field dropdown button.
7. Select the applicable reason using the **Reason** field dropdown button.

Note: There are two Action Reason combinations related to an employee's death. One is Termination/Death, and the other is Termination/Death with Dependent. The difference between the two events is that the benefits terminate on different dates. When an employee passes away, the Benefit Administrator should review the employee's current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination.

For further information on Action Reasons, see the Job Aid titled **HR351 Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The **Job Data** page refreshes.

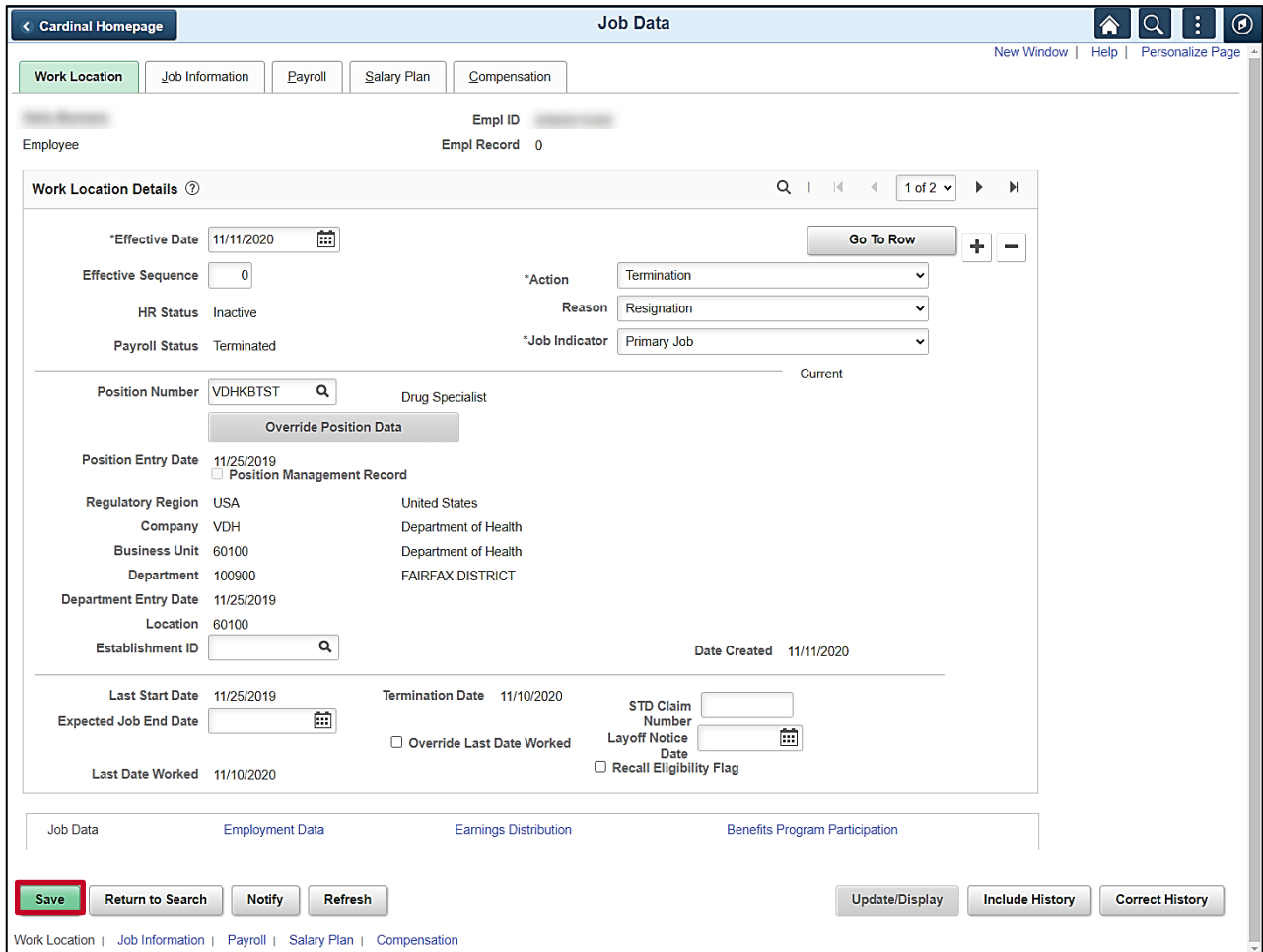


The screenshot shows the 'Job Data' page for an employee. The 'Work Location Details' section is highlighted with a red box. The fields are as follows:

*Effective Date	11/11/2020	Go To Row	+	-
Effective Sequence	0	*Action	Termination	
HR Status	Inactive	Reason	Resignation	
Payroll Status	Terminated	*Job Indicator	Primary Job	

8. After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update. Validate that the HR status displays as "Inactive" and the Payroll status displays as "Terminated".

The **Job Data** page returns.



The screenshot shows the 'Job Data' page for an employee. The 'Save' button is highlighted with a red box. The page contains various fields for job details, including effective date, position number, and termination date.

9. Click the **Save** button.

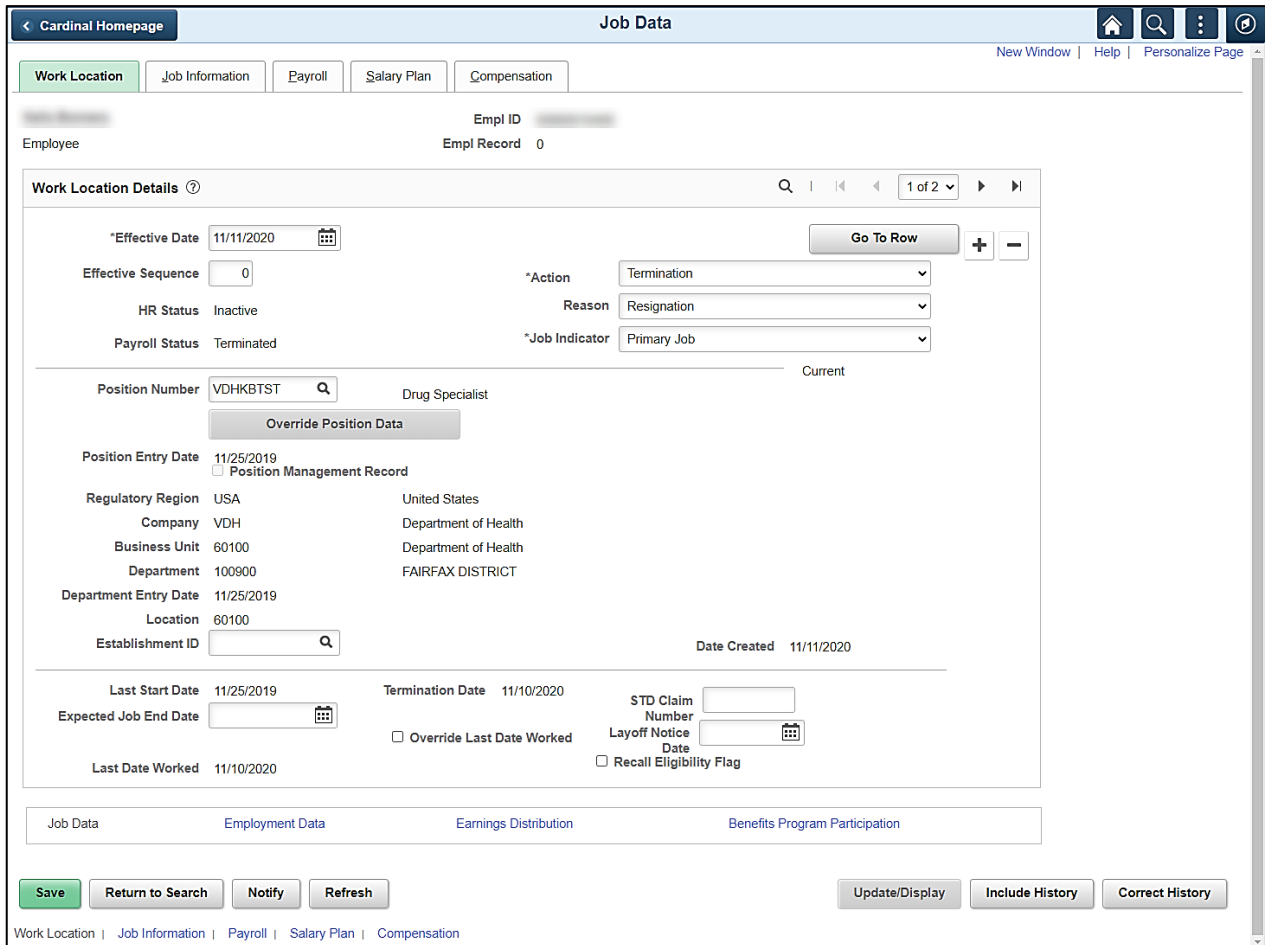
Note: If a Termination Action Reason of “Death” or “Death with Dependent” is selected, the death date on the employee’s Personal Record is updated, and the **Death Warning Message** displays in a pop-up window.

Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)

Date of Death on personal data gets updated for the current transaction.

10. Click the **OK** button.

The **Job Data** page returns.



Cardinal Homepage Job Data New Window | Help | Personalize Page

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

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

Work Location Details 1 of 2

*Effective Date: 11/11/2020 Go To Row

Effective Sequence: 0 *Action: Termination

HR Status: Inactive Reason: Resignation

Payroll Status: Terminated *Job Indicator: Primary Job

Position Number: VDHKBTST Drug Specialist
Current

Position Entry Date: 11/25/2019 Override Position Data

Regulatory Region: USA United States

Company: VDH Department of Health

Business Unit: 60100 Department of Health

Department: 100900 FAIRFAX DISTRICT

Department Entry Date: 11/25/2019

Location: 60100 Date Created: 11/11/2020

Establishment ID: [Redacted]

Last Start Date: 11/25/2019 Termination Date: 11/10/2020

Expected Job End Date: [Redacted] STD Claim Number: [Redacted]

Last Date Worked: 11/10/2020 Layoff Notice Date: [Redacted]

Override Last Date Worked Recall Eligibility Flag

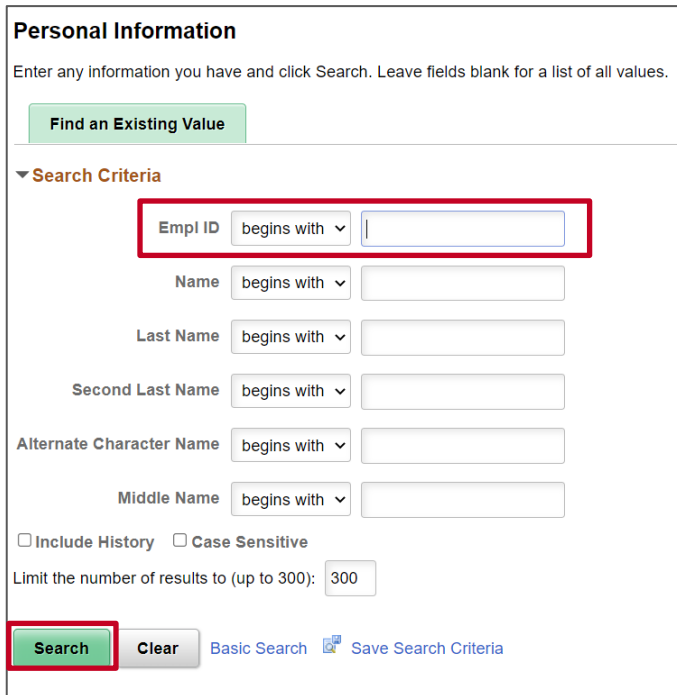
Job Data | Employment Data | Earnings Distribution | Benefits Program Participation

Save | Return to Search | Notify | Refresh Update/Display | Include History | Correct History

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

11. The employee's email address should be updated to a personal email in Personal Data.
12. Navigate to the **Modify a Person** page using the following navigation:
Navigator > Workforce Administration > Personal Information > Modify a Person

The **Modify a Person** search page displays.



Personal Information

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

[Find an Existing Value](#)

▼ **Search Criteria**

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

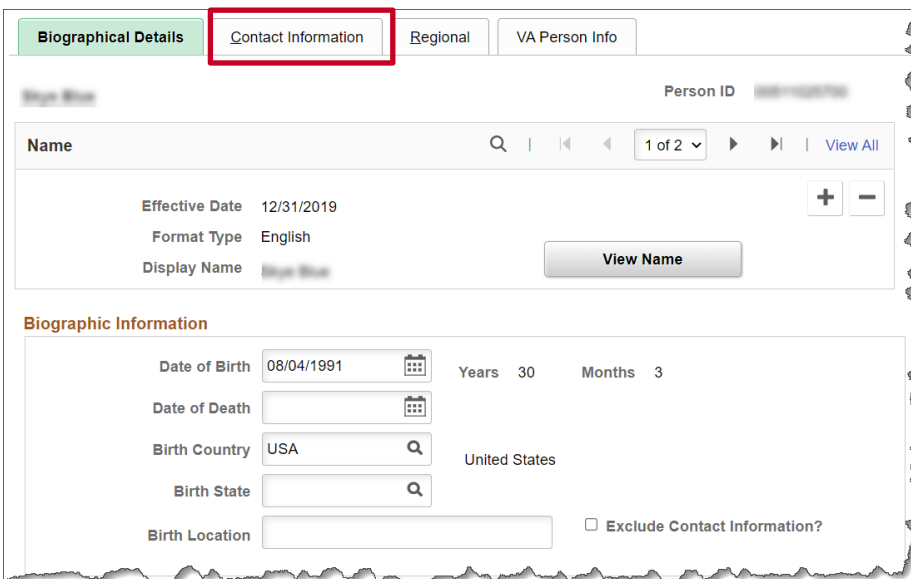
Include History Case Sensitive

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

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

13. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.



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

Person ID [redacted]

Name [redacted] 1 of 2 [View All](#)

Effective Date 12/31/2019 + -

Format Type English

Display Name [redacted] [View Name](#)

Biographic Information

Date of Birth 08/04/1991 Years 30 Months 3

Date of Death

Birth Country USA United States

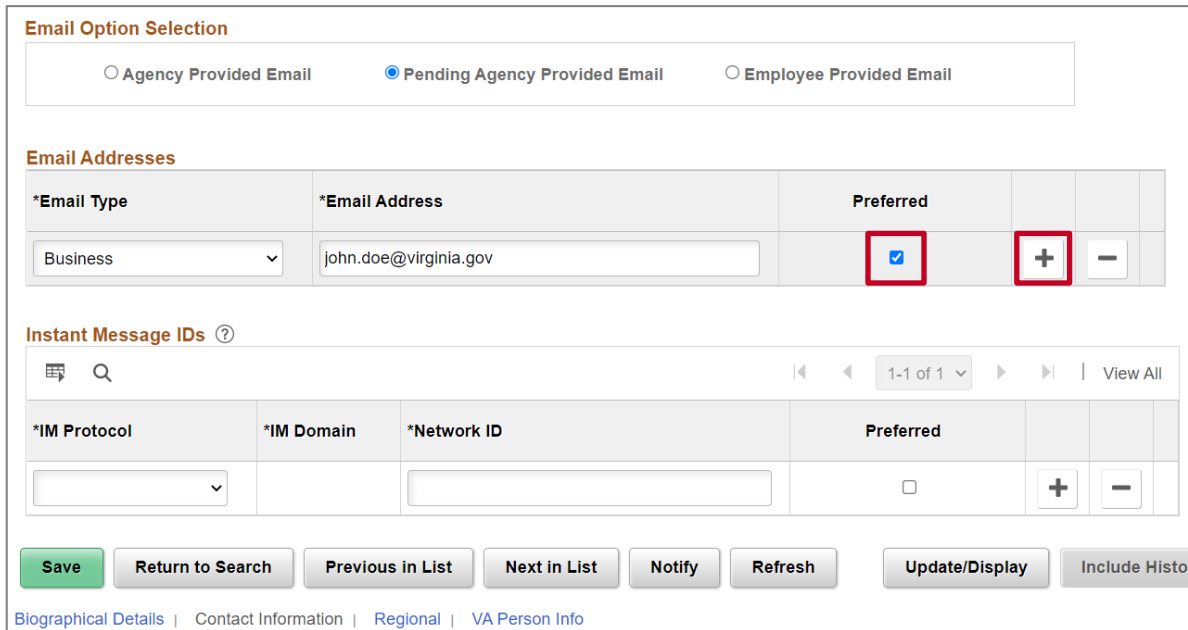
Birth State

Birth Location

Exclude Contact Information?

14. Click the **Contact Information** tab.

The **Contact Information** tab on the **Modify a Person** page displays.



Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
Business	john.doe@virginia.gov	<input checked="" type="checkbox"/>	+	-

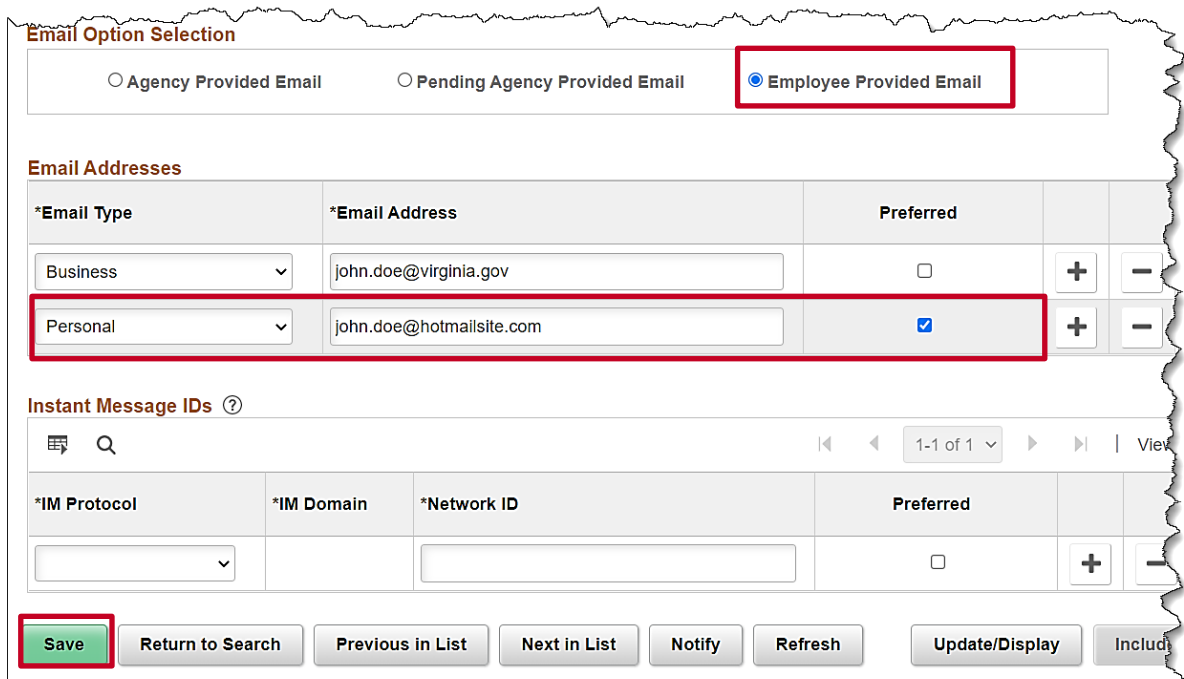
Instant Message IDs ?

1-1 of 1 | View All

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

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

15. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
16. Click the **Add a New Row** button to add a new email address.
17. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.



Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
Business	john.doe@virginia.gov	<input type="checkbox"/>	+	-
Personal	john.doe@hotmail.com	<input checked="" type="checkbox"/>	+	-

Instant Message IDs ?

1-1 of 1 | View All

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

18. Click the **Save** button.
19. To run the Employee Activity Report for the employee, use the following navigation:

Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report

20. Run the Employee Activity Report for the employee.

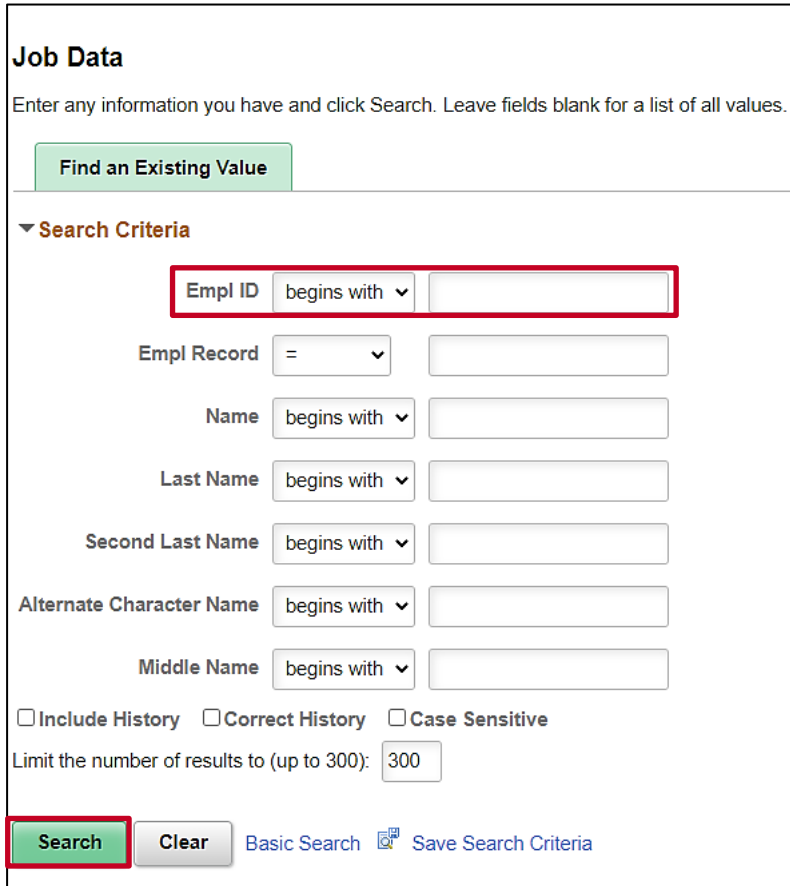
Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the **HCM Reports Catalog**. The HCM Reports Catalog can be found on the Cardinal website under **Resources**. Print the report and place the printed transaction in the employee file for future audit requests.

Termination – Involuntary (except Layoff)

1. Navigate to the **Job Data Search** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

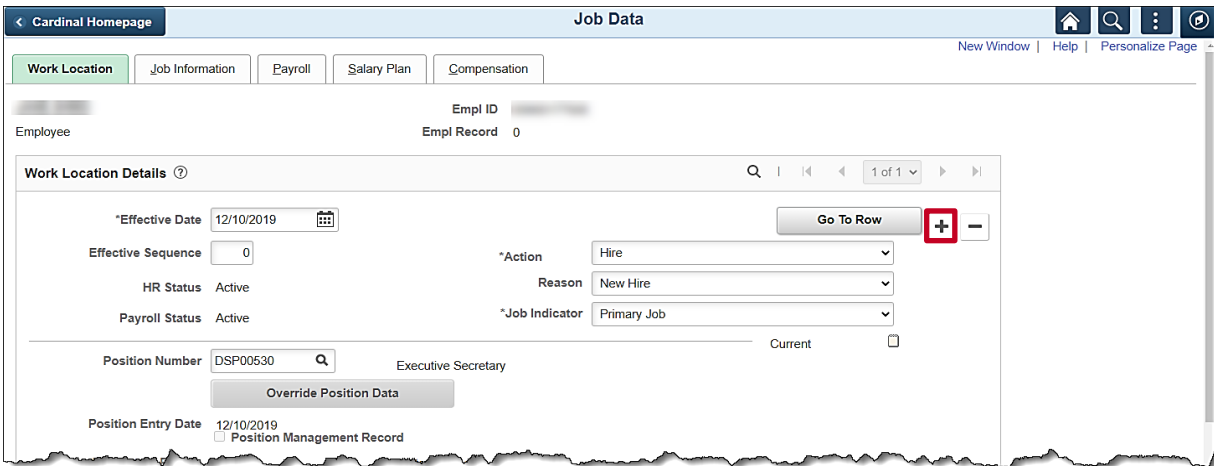


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

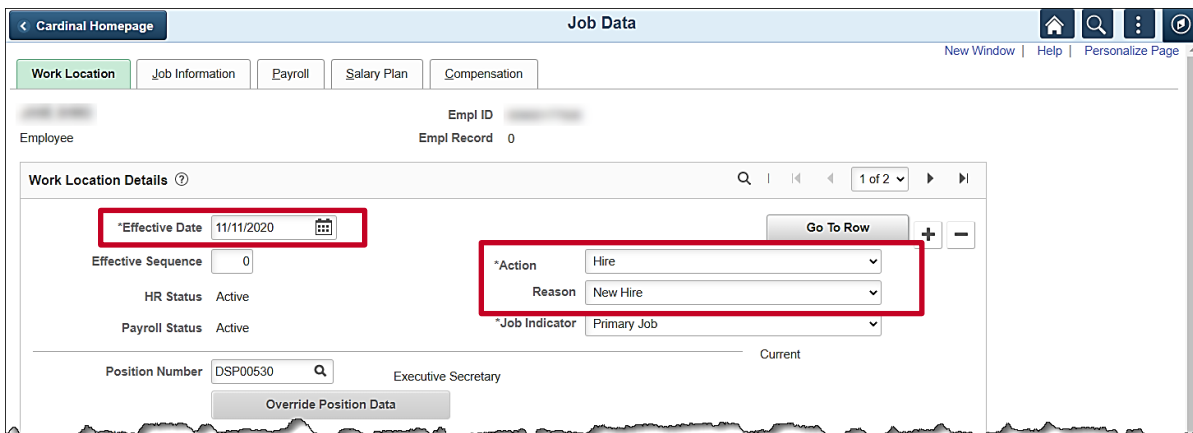
3. Click the **Search** button.

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



4. Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.



Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

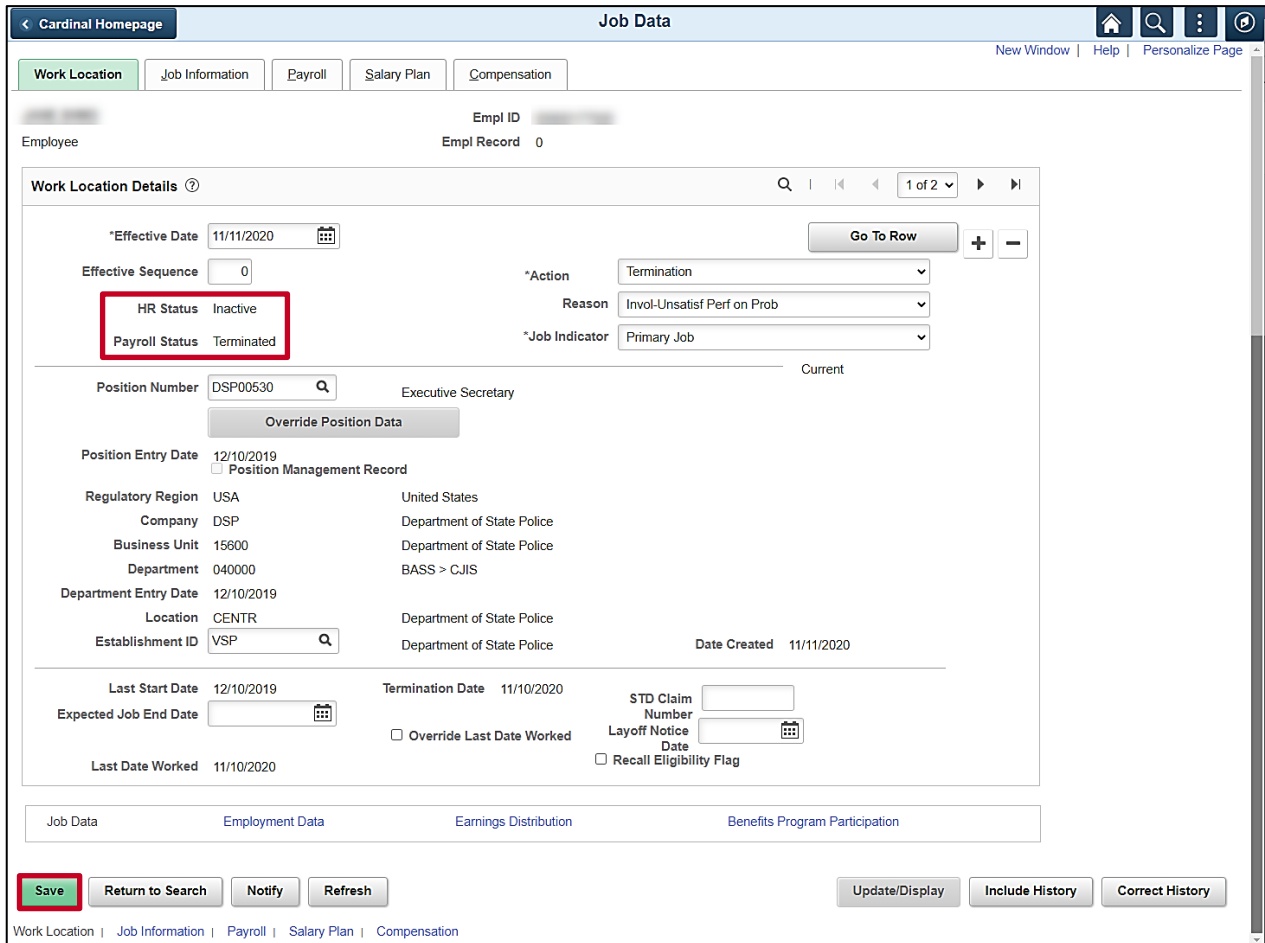
5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

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**.

6. Select the **“Termination”** option using the **Action** field dropdown button.
7. Select the applicable reason using the **Reason** field dropdown button.

Note: For further information on Action Reasons, see the Job Aid titled **HR351 Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

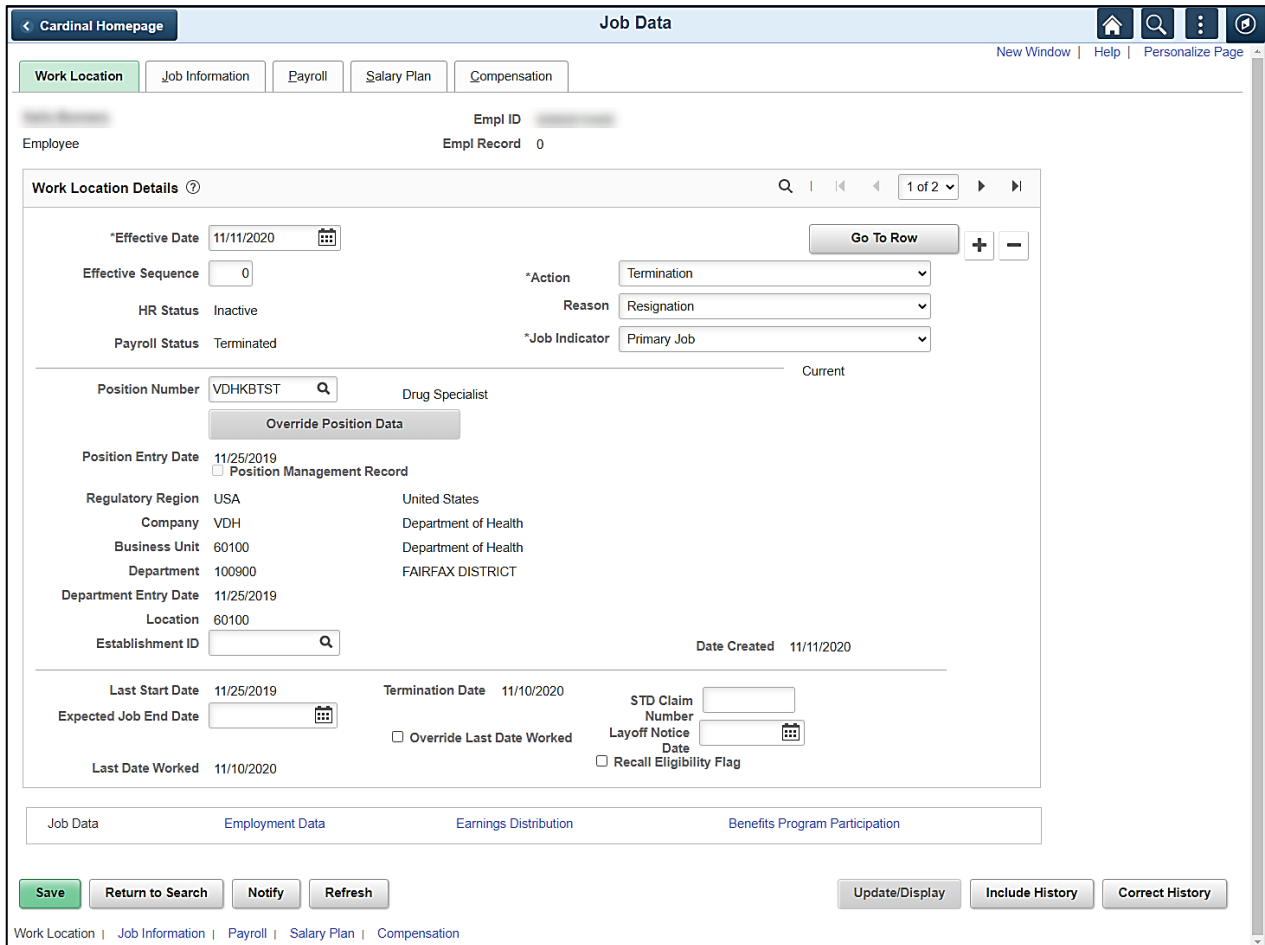
The **Job Data** page refreshes.



The screenshot displays the 'Job Data' page for an employee. The page is divided into several sections. At the top, there are navigation tabs: 'Work Location', 'Job Information', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Work Location' tab is active. Below the tabs, there are fields for 'Employee' and 'Empl ID'. The 'Work Location Details' section contains a table with columns for 'Effective Date', 'Effective Sequence', 'Action', 'Reason', and 'Job Indicator'. The 'Effective Date' is 11/11/2020, 'Effective Sequence' is 0, 'Action' is 'Termination', 'Reason' is 'Invol-Unsatisf Perf on Prob', and 'Job Indicator' is 'Primary Job'. The 'HR Status' is 'Inactive' and 'Payroll Status' is 'Terminated', both highlighted with a red box. Below this, there are fields for 'Position Number' (DSP00530), 'Position Entry Date' (12/10/2019), 'Regulatory Region' (USA), 'Company' (DSP), 'Business Unit' (15600), 'Department' (040000), 'Department Entry Date' (12/10/2019), 'Location' (CENTR), and 'Establishment ID' (VSP). There are also fields for 'Last Start Date' (12/10/2019), 'Termination Date' (11/10/2020), 'Expected Job End Date', and 'Last Date Worked' (11/10/2020). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', 'Include History', and 'Correct History'. The 'Save' button is highlighted with a red box.

- After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Terminated”.
- Click the **Save** button.

The **Job Data** page returns.



Cardinal Homepage **Job Data** New Window | Help | Personalize Page

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

Employee Empl ID Empl Record 0

Work Location Details 1 of 2

*Effective Date: 11/11/2020 Go To Row + -

Effective Sequence: 0 *Action: Termination

HR Status: Inactive Reason: Resignation

Payroll Status: Terminated *Job Indicator: Primary Job

Position Number: VDHKBTST Drug Specialist Current

Override Position Data

Position Entry Date: 11/25/2019 Position Management Record

Regulatory Region: USA United States

Company: VDH Department of Health

Business Unit: 60100 Department of Health

Department: 100900 FAIRFAX DISTRICT

Department Entry Date: 11/25/2019

Location: 60100

Establishment ID: Date Created: 11/11/2020

Last Start Date: 11/25/2019 Termination Date: 11/10/2020

Expected Job End Date: Override Last Date Worked

Last Date Worked: 11/10/2020

STD Claim Number:

Layoff Notice Date:

Recall Eligibility Flag

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

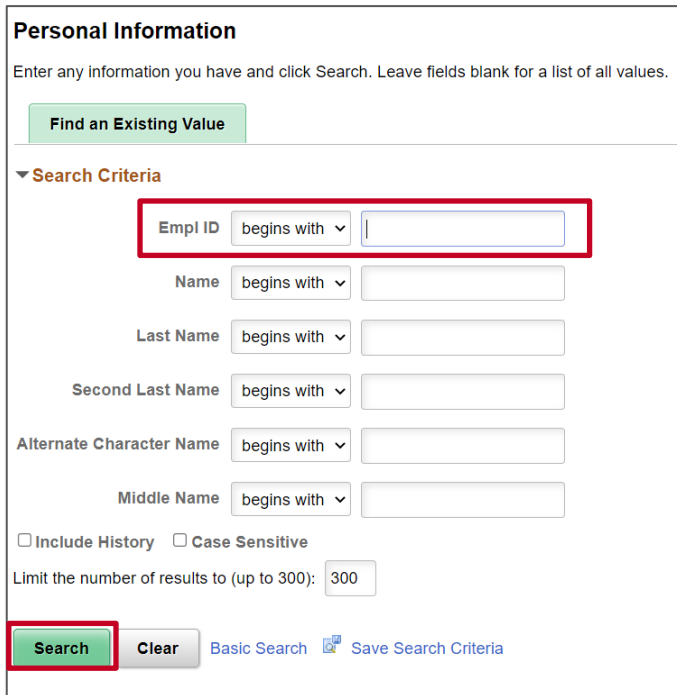
Save Return to Search Notify Refresh Update/Display Include History Correct History

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

- The employee's email address should be updated to a personal email in Personal Data. Navigate to the **Modify a Person** page using the following navigation:

Navigator > Workforce Administration > Personal Information > Modify a Person

The **Modify a Person** search page displays.



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

Find an Existing Value

▼ **Search Criteria**

Empl ID begins with []

Name begins with []

Last Name begins with []

Second Last Name begins with []

Alternate Character Name begins with []

Middle Name begins with []

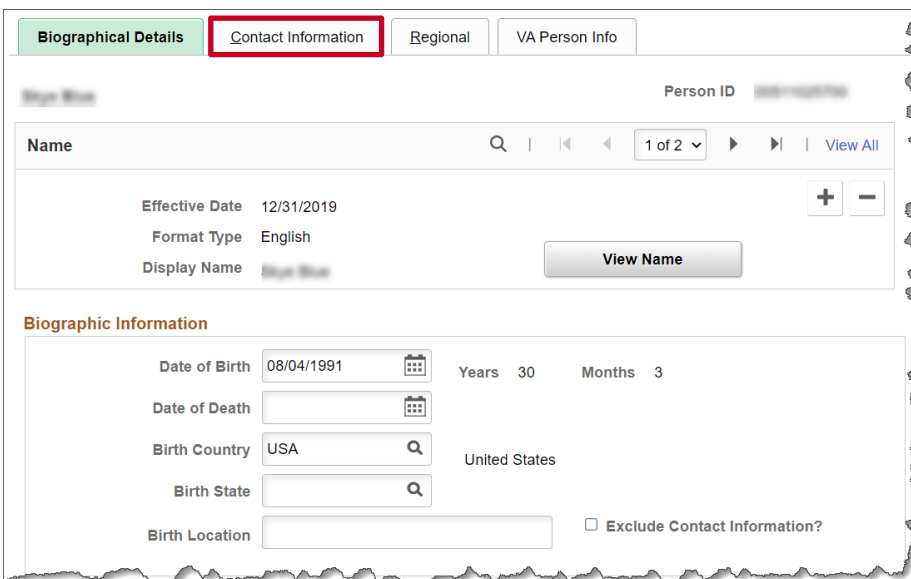
Include History Case Sensitive

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

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

11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.



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

Person ID []

Name [] 1 of 2 | View All

Effective Date 12/31/2019 + -

Format Type English

Display Name [] View Name

Biographic Information

Date of Birth 08/04/1991 Years 30 Months 3

Date of Death []

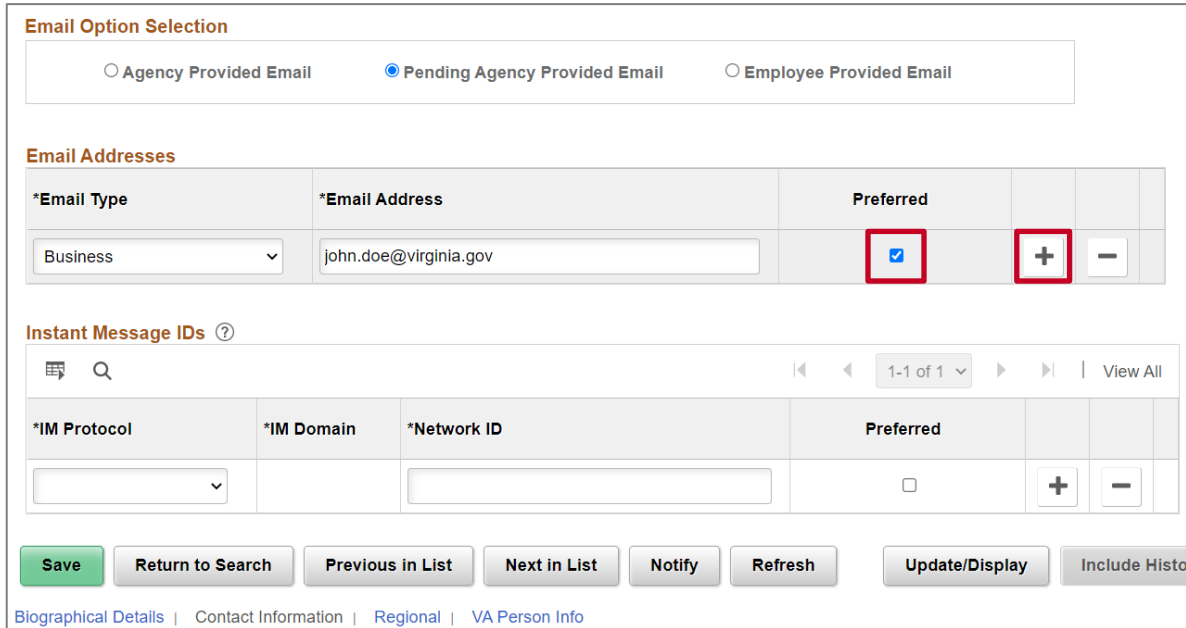
Birth Country USA United States

Birth State []

Birth Location [] Exclude Contact Information?

12. Click the **Contact Information** tab.

The **Contact Information** tab on the **Modify a Person** page displays.



Email Option Selection

Agency Provided Email Pending Agency Provided Email Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
Business	john.doe@virginia.gov	<input checked="" type="checkbox"/>	+	-

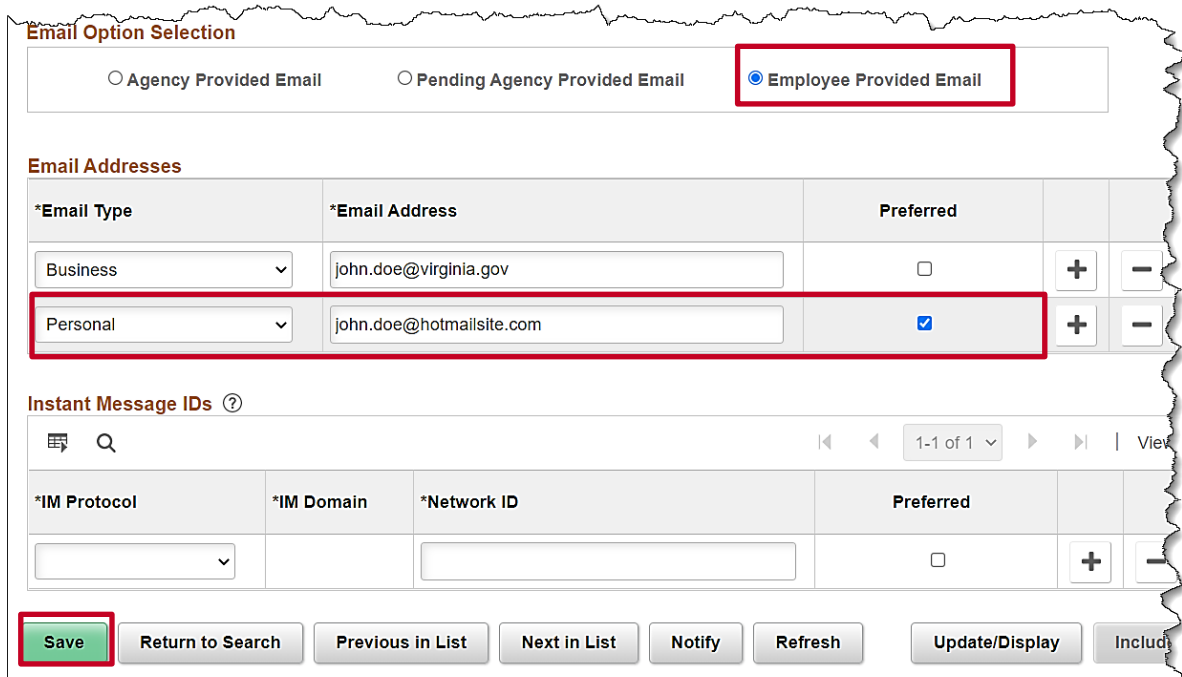
Instant Message IDs ?

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

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include History**

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

13. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
14. Click the **Add a New Row** button to add a new email address.
15. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.



Email Option Selection

Agency Provided Email Pending Agency Provided Email Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
Business	john.doe@virginia.gov	<input type="checkbox"/>	+	-
Personal	john.doe@hotmail.com	<input checked="" type="checkbox"/>	+	-

Instant Message IDs ?

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

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include History**

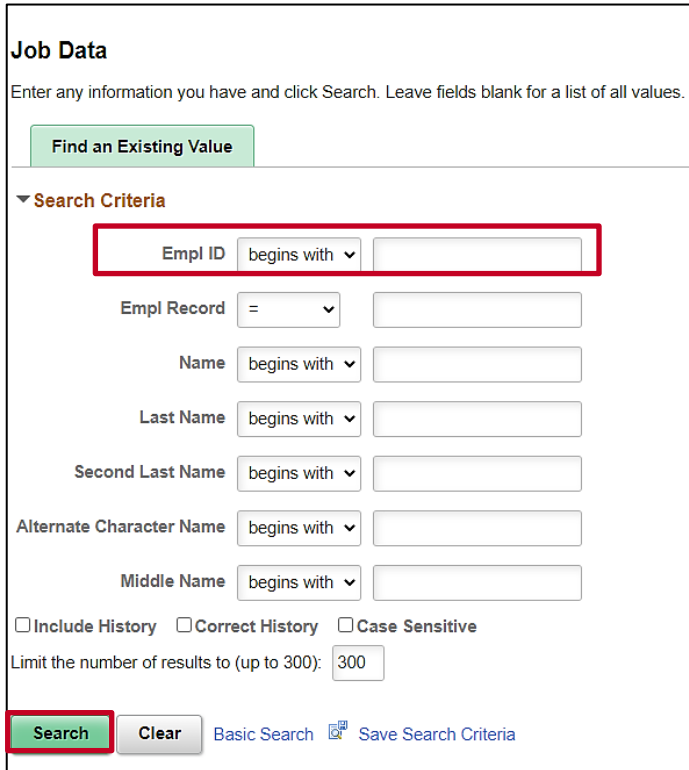
16. Click the **Save** button.
17. To run the Employee Activity Report for the employee, use the following navigation:
Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report
18. Run the Employee Activity Report for the employee.
Note: Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.
19. Print the report and place the printed transaction in the employee file for future audit requests.

Retirement – VRS Retiree

1. Navigate to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.



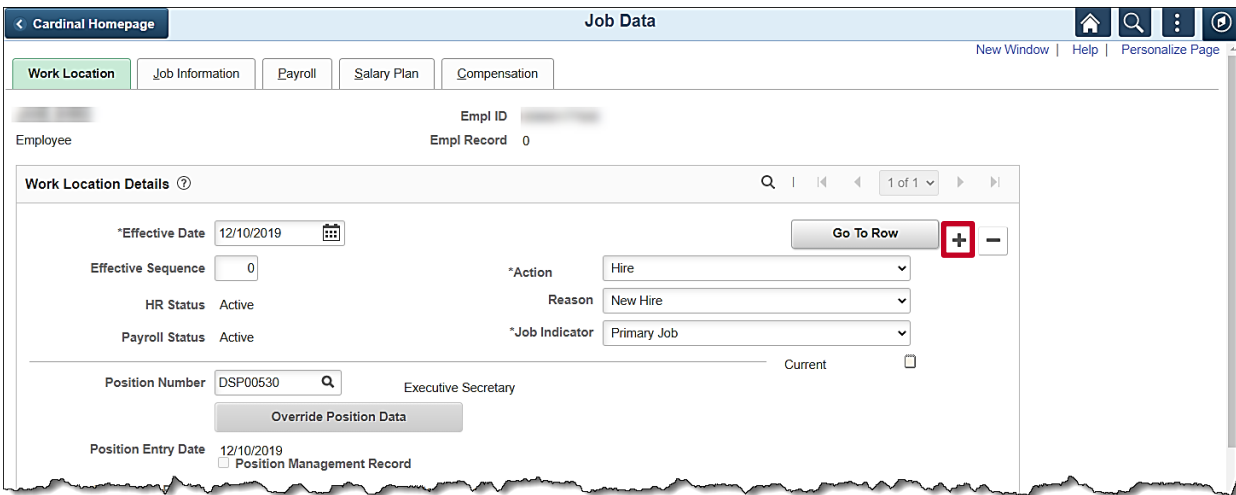
The screenshot shows the 'Job Data' search interface. At the top, there is a green button labeled 'Find an Existing Value'. Below it, a section titled 'Search Criteria' contains several search fields: 'Empl ID' (with a dropdown set to 'begins with' and a red box around the field), 'Empl Record' (with a dropdown set to '=' and an empty text box), 'Name' (with a dropdown set to 'begins with' and an empty text box), 'Last Name' (with a dropdown set to 'begins with' and an empty text box), 'Second Last Name' (with a dropdown set to 'begins with' and an empty text box), 'Alternate Character Name' (with a dropdown set to 'begins with' and an empty text box), and 'Middle Name' (with a dropdown set to 'begins with' and an empty text box). Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. A text input field for 'Limit the number of results to (up to 300):' is set to '300'. At the bottom, there is a red 'Search' button, a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

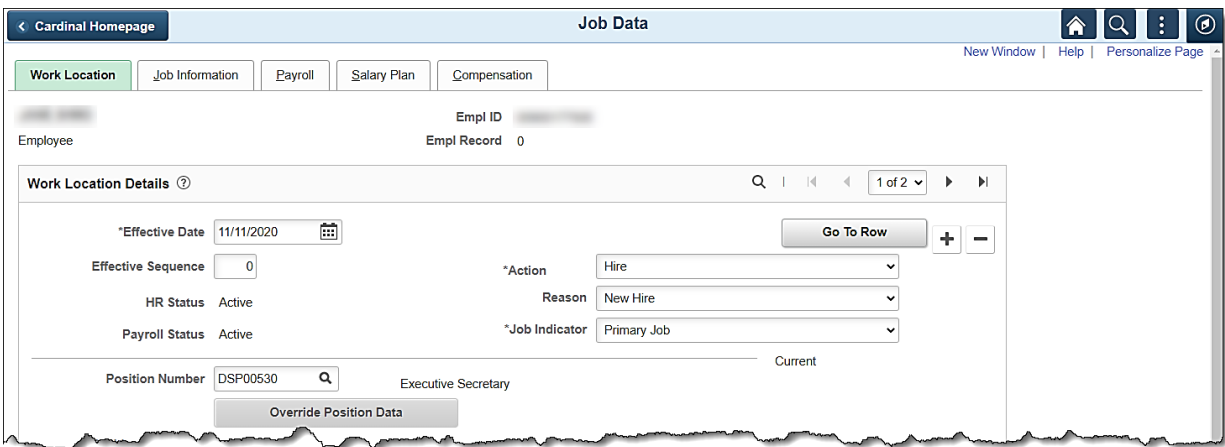
3. Click the **Search** button.

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



4. Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.



Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

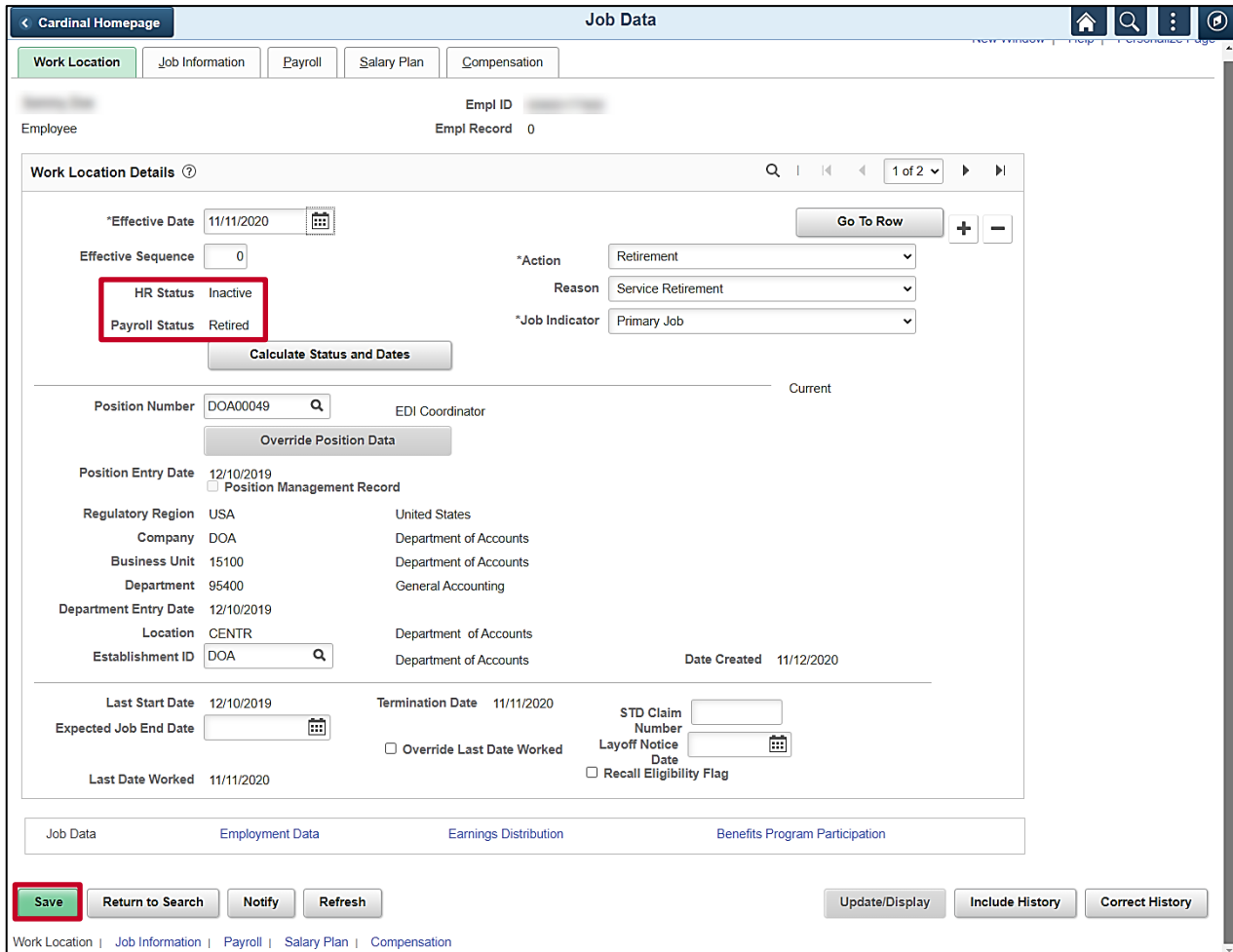
Note: Set the effective date to be one day after the employee's last day worked. If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. Select the **"Retirement"** option using the **Action** field dropdown button.

7. Select the applicable reason using the **Reason** field dropdown button.

Note: For further information on Action Reasons, see the Job Aid titled **HR351 Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The **Job Data** page refreshes.



The screenshot displays the 'Job Data' page for an employee. The 'Work Location Details' section is expanded, showing the following information:

- *Effective Date: 11/11/2020
- Effective Sequence: 0
- HR Status: Inactive (highlighted with a red box)
- Payroll Status: Retired (highlighted with a red box)
- *Action: Retirement
- Reason: Service Retirement
- *Job Indicator: Primary Job

Below this section, the 'Position Number' is DOA00049, and the 'Termination Date' is 11/11/2020. The 'Save' button at the bottom left is also highlighted with a red box.

8. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will automatically update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.
9. Click the **Save** button.
10. The employee’s email address should be updated to a personal email in Personal Data. Navigate to the **Modify a Person** page using the following navigation:

Navigator > Workforce Administration > Personal Information > Modify a Person

The **Modify a Person** search page displays.

Personal Information

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

[Find an Existing Value](#)

▼ **Search Criteria**

Empl 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 Case Sensitive

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

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

11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.

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

Person ID

Name 1 of 2 [View All](#)

Effective Date 06/22/2021 + -

Format Type English [View Name](#)

Display Name

Biographic Information

Date of Birth 12/23/1973 Years 48 Months 1

Date of Death

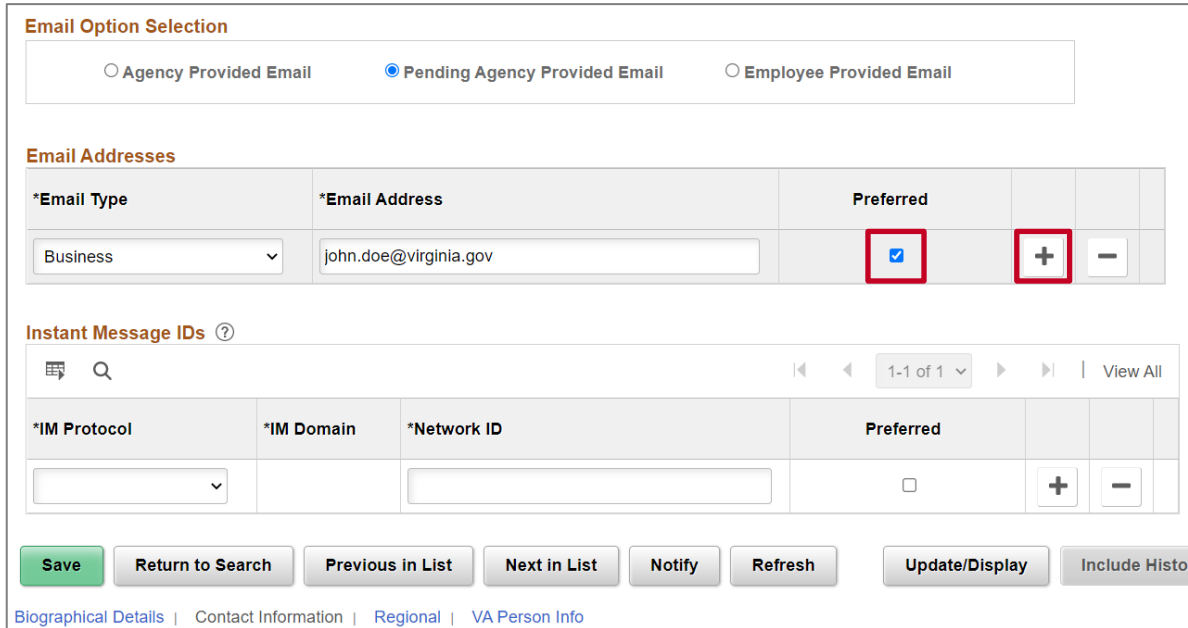
Birth Country USA United States

Birth State

Birth Location Exclude Contact Information?

12. Click the **Contact Information** tab.

The **Contact Information** tab on the **Modify a Person** page displays.



Email Option Selection

Agency Provided Email Pending Agency Provided Email Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
Business	john.doe@virginia.gov	<input checked="" type="checkbox"/>	+	-

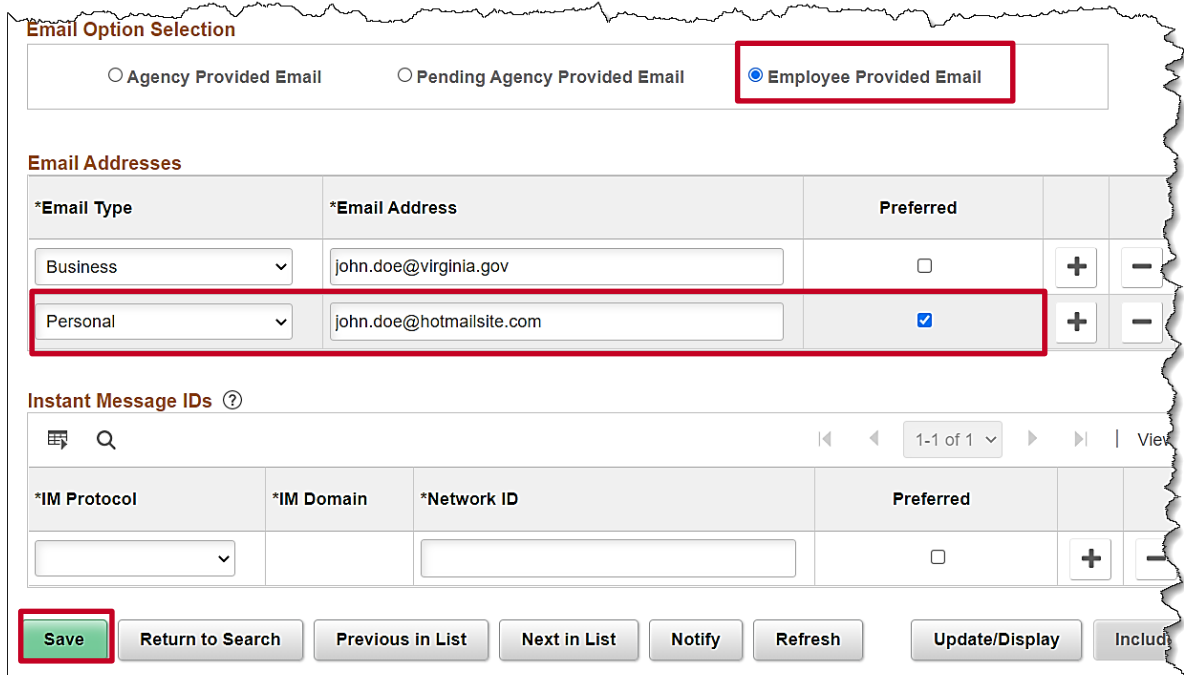
Instant Message IDs ?

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

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include History**

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

13. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
14. Click the **Add a New Row** button to add a new email address.
15. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.



Email Option Selection

Agency Provided Email Pending Agency Provided Email Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred		
Business	john.doe@virginia.gov	<input type="checkbox"/>	+	-
Personal	john.doe@hotmail.com	<input checked="" type="checkbox"/>	+	-

Instant Message IDs ?

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

Save **Return to Search** **Previous in List** **Next in List** **Notify** **Refresh** **Update/Display** **Include History**

16. Click the **Save** button.

Note: VRS will now hire VRS eligible employees into the VRS Retirement position.

17. To run the Employee Activity Report for the employee, use the following navigation:

Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report

18. Run the Employee Activity Report for the employee.

Note: Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

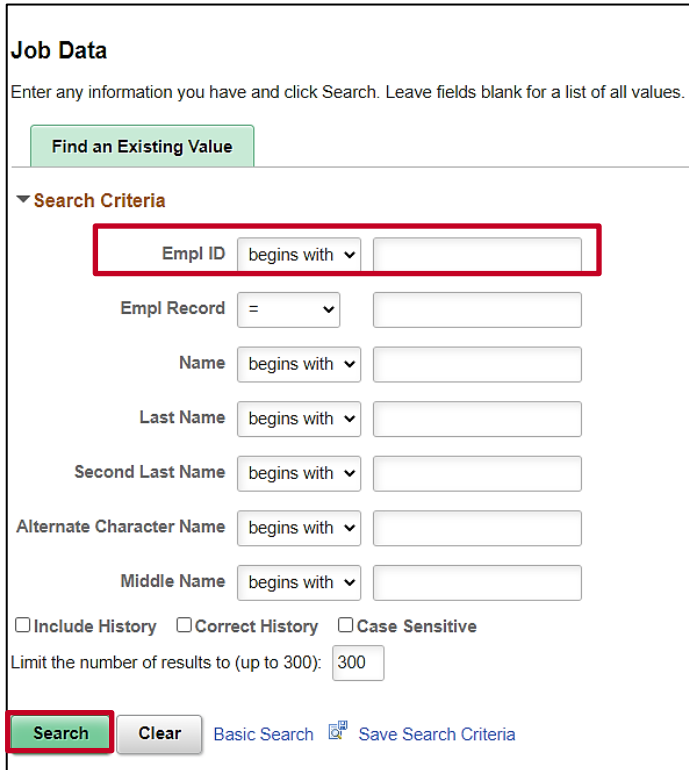
19. Print the report and place the printed transaction in the employee file for future audit requests.

Retirement – ORP Retiree

1. Navigate to the **Job Data** page using the following path:

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.



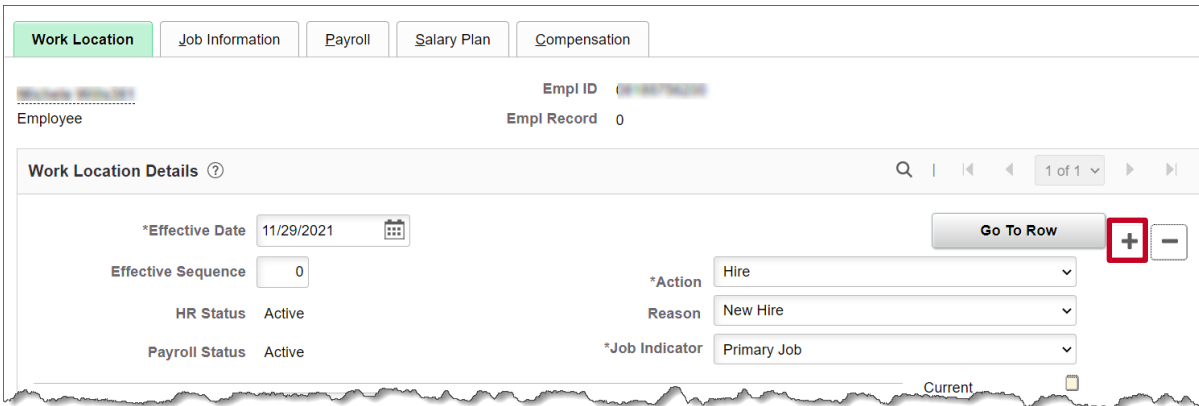
The screenshot shows the 'Job Data' search interface. At the top, there is a green button labeled 'Find an Existing Value'. Below it, a section titled 'Search Criteria' contains several search fields: 'Empl ID' (with a dropdown set to 'begins with' and a red box around the field), 'Empl Record' (with a dropdown set to '=' and an empty text box), 'Name' (with a dropdown set to 'begins with' and an empty text box), 'Last Name' (with a dropdown set to 'begins with' and an empty text box), 'Second Last Name' (with a dropdown set to 'begins with' and an empty text box), 'Alternate Character Name' (with a dropdown set to 'begins with' and an empty text box), and 'Middle Name' (with a dropdown set to 'begins with' and an empty text box). Below these fields are three checkboxes: 'Include History', 'Correct History', and 'Case Sensitive'. A text input field for 'Limit the number of results to (up to 300):' is set to '300'. At the bottom, there is a red 'Search' button, a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

Note: You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



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

Empl ID [REDACTED]
Employee | Empl Record 0

Work Location Details ?

*Effective Date 11/29/2021 [Calendar Icon] | Go To Row + -

Effective Sequence 0

HR Status Active

Payroll Status Active

*Action Hire

Reason New Hire

*Job Indicator Primary Job

Current

4. Click the **Add a New Row** icon (+) to add a new effective dated row.

The **Work Location** tab refreshes with a new effective dated row displayed.

Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

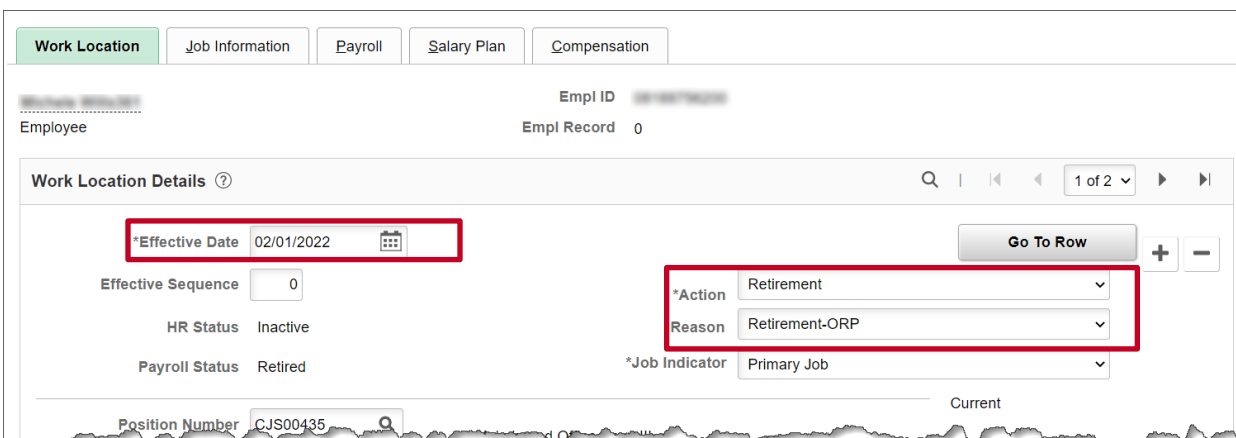
5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

Note: Set the effective date to be one day after the employee’s last day worked. If an employee’s last day is 11/10/2021, the effective date of the termination should be 11/11/2021. 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**.

6. Select the **“Retirement”** option using the **Action** field dropdown button.

7. Select the **“Retirement – ORP”** using the **Reason** field dropdown button.

The **Job Data** page refreshes.



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

Empl ID [REDACTED]
Employee | Empl Record 0

Work Location Details ?

*Effective Date 02/01/2022 [Calendar Icon] | Go To Row + -

Effective Sequence 0

HR Status Inactive

Payroll Status Retired

*Action Retirement

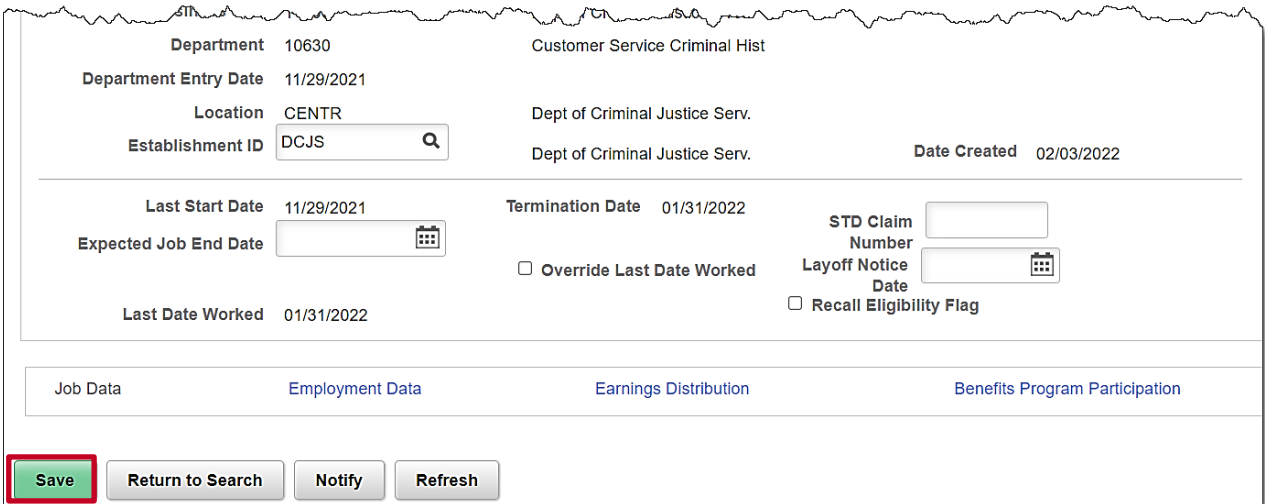
Reason Retirement-ORP

*Job Indicator Primary Job

Current

Position Number CJS00435

8. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will automatically update as applicable. Validate that the HR status displays as **“Inactive”** and the Payroll status displays as **“Retired”**.



Department 10630 Customer Service Criminal Hist
 Department Entry Date 11/29/2021
 Location CENTR Dept of Criminal Justice Serv.
 Establishment ID DCJS Dept of Criminal Justice Serv. Date Created 02/03/2022

Last Start Date 11/29/2021 Termination Date 01/31/2022
 Expected Job End Date [Calendar Icon] Override Last Date Worked
 Last Date Worked 01/31/2022

STD Claim Number [Text Box]
 Layoff Notice Date [Calendar Icon]
 Recall Eligibility Flag

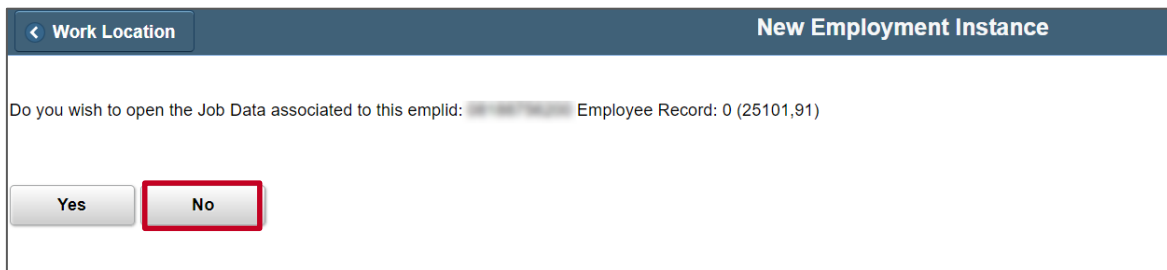
[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

9. Click the **Save** button.

Note: Now the agency HR Administrator should hire the employee into the ORP retirement position using a new employment instance.

10. Navigate to **New Employment Instance** page using this path:

Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance



[Work Location](#) New Employment Instance

Do you wish to open the Job Data associated to this emplid: [Redacted] Employee Record: 0 (25101,91)

11. Answer **No**, to the question “Do you wish to open the Job Data associated to this emplid:...”



[Work Location](#) New Employment Instance

New Employment Instance

Empl ID [Redacted]

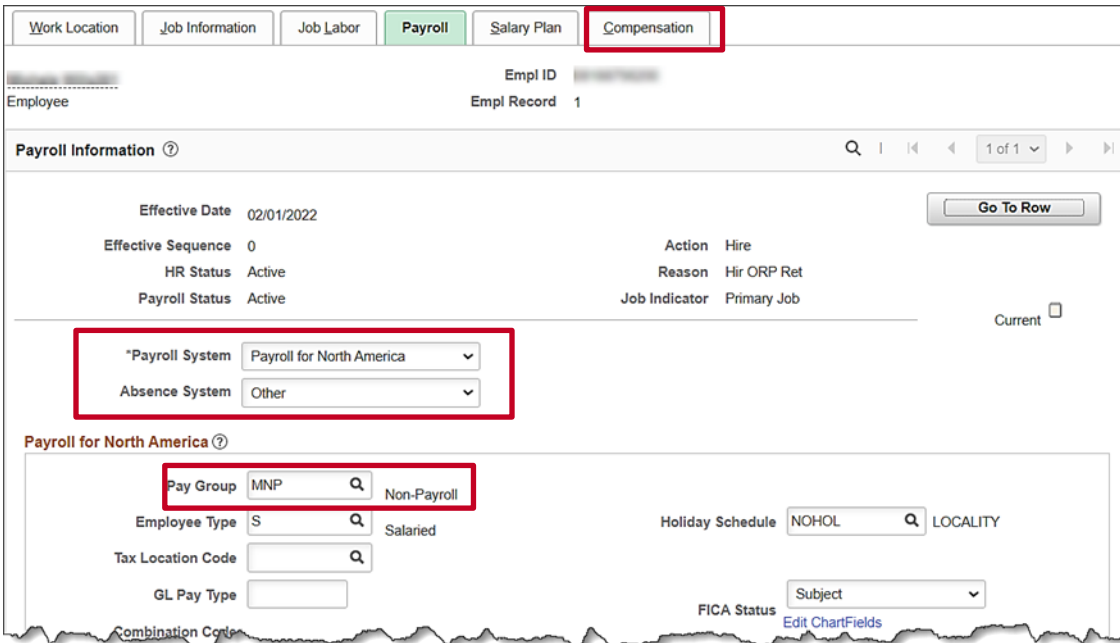
Empl Record 1

12. Click the **Add Relationship** button to add job information for the new employee record.



13. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.
14. The **Action** field defaults to **Hire**.
15. In the **Reason** field select **Hir ORP Ret**.
16. Locate the ORP position for your agency using the **Position Number** search icon.
Note: Enter **%ORP** to search for the ORP position number.
17. Click the **Job Information** tab.

18. Select the **ORPRetiree** in the **Empl Class**.
19. Click the **Payroll** tab.



The screenshot shows the HR351 system interface with the **Compensation** tab selected. The **Payroll Information** section is visible, showing the following details:

- Effective Date: 02/01/2022
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Action: Hire
- Reason: Hir ORP Ret
- Job Indicator: Primary Job

Below the payroll information, there are two dropdown menus:

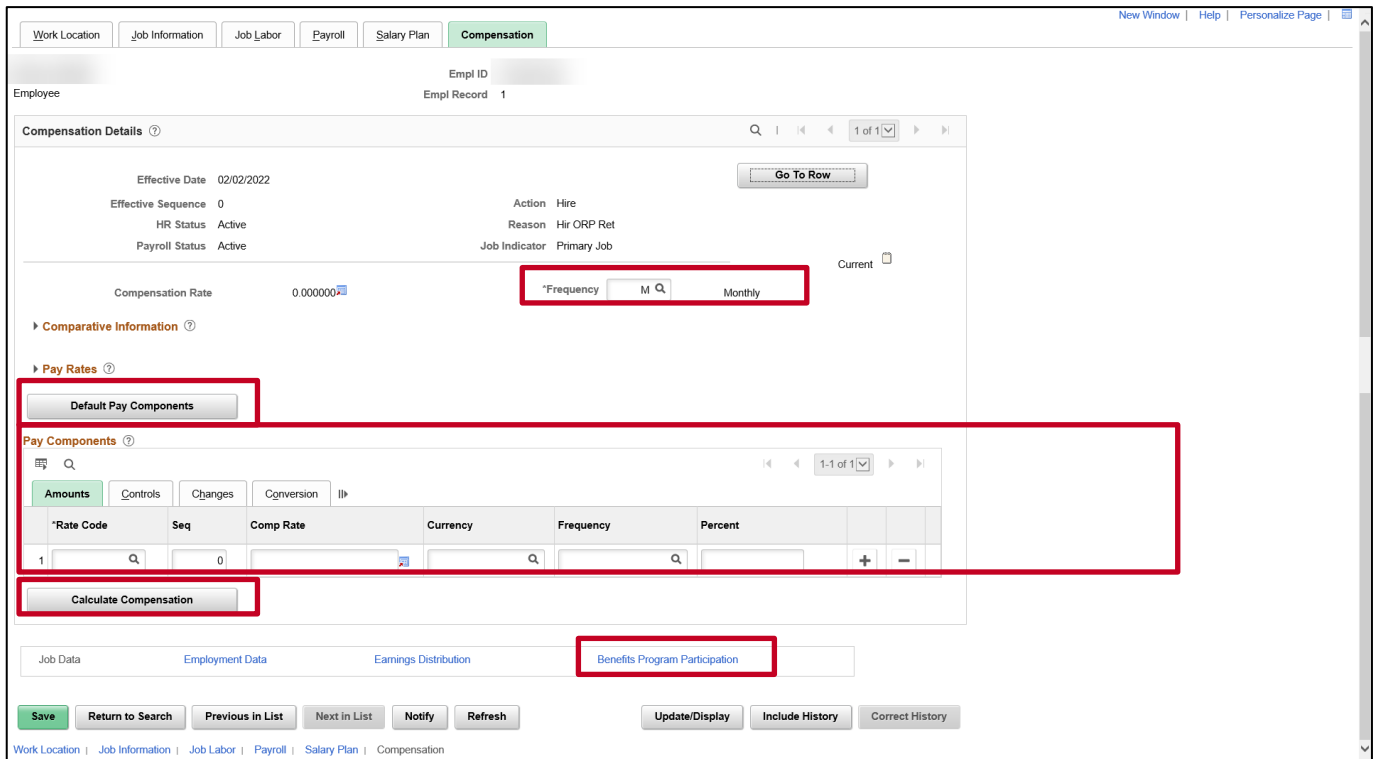
- *Payroll System:** Payroll for North America
- Absence System:** Other

The **Payroll for North America** section is expanded, showing the following fields:

- Pay Group:** MNP (highlighted with a red box)
- Employee Type:** S (highlighted with a red box)
- Tax Location Code:** (empty)
- GL Pay Type:** (empty)
- Holiday Schedule:** NOHOL
- LOCALITY:** (empty)
- FICA Status:** Subject

Other visible fields include "Non-Payroll", "Salaried", and "Edit ChartFields".

20. The **Payroll System** defaults to **Payroll for North America**. Do not change.
21. The **Absence System** defaults to **Other**. Do not change.
22. Select **MNP** in the Pay Group field. This is the Non-Payroll pay group.
23. Click the **Compensation** tab.



Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation** | New Window | Help | Personalize Page

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 1

Compensation Details (1 of 1)

Effective Date: 02/02/2022 Go To Row

Effective Sequence: 0 Action: Hire
 HR Status: Active Reason: Hir ORP Ret
 Payroll Status: Active Job Indicator: Primary Job

Compensation Rate: 0.000000 *Frequency: **M** Monthly Current

Pay Rates

Default Pay Components

Pay Components (1 of 1)

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1	0				

Calculate Compensation

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

Save | Return to Search | Previous in List | Next in List | Notify | Refresh | Update/Display | Include History | Correct History

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

24. Change the **Frequency** from A to **M**
25. Click the **Defaults Pay Components** button
26. No additional **Pay Component** fields should be entered. Click the **Calculate Compensation** button.
27. Click the **Benefits Program Participation** link.



Benefit Program Participation

Employee Empl ID
Empl Record 1

Benefit Status 1 of 1

Benefit Record Number 1 **Go To Row**

Effective Date 02/02/2022
Effective Sequence 0 Action Hire
HR Status Active Reason Hir ORP Ret
Payroll Status Active Job Indicator Primary Job

*Benefits System Benefits Administration Current
Benefits Employee Status Active

Annual Benefits Base Rate USD [ACA Eligibility Details](#)

Benefits Administration Eligibility

BAS Group ID

Elig Fld 1 Elig Fld 2 007008000 Elig Fld 3 N

Elig Fld 4 Elig Fld 5 Elig Fld 6

Elig Fld 7 Elig Fld 8 12-12 Elig Fld 9 RR-GB

Benefit Program Participation Details 1 of 1 | View All

*Effective Date 11/01/2021 Currency Code USD

*Benefit Program RET Retiree

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

Save Return to Search Previous in List Next in List Notify Refresh Update/Display Include History Correct History

28. Use the **Configuration Workbook** to complete **Eligibility Fields 2, 3, 8 & 9** based on the appropriate scenarios for the ORP Retiree.
29. Change the Benefit Program to **RET**.
30. Click the **Save** button.
31. To run the Employee Activity Report for the employee, use the following navigation:
Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report
32. Run the Employee Activity Report for the employee.

Note: Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

33. Print the report and place the printed transaction in the employee file for future audit requests.