Cardinal HCM VRS Retiree Forum - FAQ

Wednesday, October 26, 2022

Q: Once the future-dated retirement separation transaction is keyed in Cardinal, should we manually go into VNAV to separate the employee with a future date?

A: The HR Administrator may enter the retirement separation transaction in Cardinal with a future effective date. Doing this will alert the health care vendors of the pending termination. However, the VRS interface from Cardinal currently will not process future dated transactions. If you do enter the retirement in Cardinal with a future date, you will also need to manually key that retirement separation in VNAV.

Q: Does the employee have to use ESS to enroll in the retiree health care plan or can the agency BA key it for them?

A: For VRS retirees, the agency cannot enroll the employee in the retiree health care plan because that health record will reside on the Job record under the VRSRT Business Unit. The employee is encouraged to use ESS if possible. However, a form can be submitted to VRS for them to process the enrollment, if needed.

Q: When the employee is on paid leave, in STD, and will be transitioning to LTD or service retirement, will they receive a notice letting them know that they can enroll in health care through ESS?

A: It will be the responsibility of the agency HR or BN Administrator to notify the employee when they can enroll in their retirement benefits through ESS. The employee will not get an automated notification from the Cardinal system.

Q: Is the enrollment form required for removing dependents/reducing membership level or is the retiree able to do that using ESS?

A: The retiree will be able to participate in Open Enrollment and the standard life events through ESS just like active employees. When the retiree completes the initial enrollment into the retiree health care plan via ESS, they will be able to add dependents, if applicable.

Q: How often does the interface occur?

A: The interfaces from Cardinal to VRS VNAV system and from VNAV to Cardinal are nightly interfaces. Monday-Friday, except holidays.

Q: When the retirement record is created will the employee receive a new record number? Does that mean the agency will do the termination on the agency employee record?

A: The VRSRT Job (active retirement record) will have a new Employee Record number. Yes, the agency will complete the retirement separation on the existing agency Job record. Agencies will not have access to complete a separation on the VRSRT Job record. Agencies will only be able to see the VRSRT Job information through the Organizational Summary page. Refer to the VRS Retirement and LTD Processes for HR and BN Admins job aid for more information.

Q: Is the Agency notified of the VNAV record when we are notified that we need to certify the retirement? Or is it a separate notification?

A: The VNAV notification process is the same as it was prior to Cardinal. However, agencies will need to watch Cardinal for the VRSRT Job record to become present. That is the trigger for the agency to ask the employee to enroll in their retirement benefits through ESS.

Q: If the retiree maintains an agency-sponsored email in retirement, does a change have to take place?

A: VRS will only populate the Personal Email Address. They would populate that with the agency-sponsored email provided to them by the retiree. However, that email address cannot simultaneously exist as the Business Email Address as only one instance of an email address can exist in Cardinal at a given time. Therefore, the agency would need to remove as the Business Email Address and add as the Personal Email Address, also changing the Email Option to Employee Provided. This change will require the employee to re-register in Okta even though their credentials have not changed. It is the responsibility of the agency to communicate this to the employee.

Q: What if the employee does not have a personal email address and they are making their last day in the office several weeks ahead of retirement by burning through their leave balances?

A: If the employee does not have a personal email address and the agency is not giving them the ability to use their current business address as a personal email address, then the employee will not have access to Cardinal at all after they lose their access through their business, agency provided email. The agency would populate the Personal Email Address field with noemail@virginia.gov and update the Email Option to Employee Provided Email.

Q: Can the agency enter both email addresses in Cardinal when counseling and then will the agency have the flexibility to simply switch the preferred option choice?

A: The agency can populate both email addresses. However, the personal email address provided to VRS by the retiree will be interfaced into Cardinal and will overwrite what already exists in that field (hopefully with the exact same value). The agency would switch the Email Option and communicate the change in credentials to the employee at the appropriate time.

Q: What happens if the agency terminates system access prior to retirement or LTD?

A: The employee will need to register in Okta with their new credentials in order to access Cardinal. This may interrupt their responsibilities for their active job. It is the responsibility of the agency to communicate the credential change to the employee.

Q: Do HR/BN Read Only roles have access to view these job records to monitor VRSRT?

A: The monitoring of the existence of the VRSRT Job has to occur on the Organizational Summary page. Agencies will not have access to view the VRSRT Job record like they are able to view the agency Job record.

Q: Will employees get a notification of that "new hire" event being created in Cardinal?

A: The employee will not receive a notification from Cardinal. It will be the responsibility of the agency HR/BN Administrator to monitor the existence of the VRSRT Job and then communicate with the employee that they can enroll in their retiree health care plan in ESS.

Q: Will Cardinal ESS block retiree health benefits enrollment if the retiree has waited beyond the 30/31-day window to enroll in the state benefits plan?

A: Yes. New hire events are only available for the 31-day window for active employees and retiree elections. If the retiree misses the window, they will need to reach out to OHB.

Q: There is a choice to add dependents on the ESS benefits screen. Will the retiree add them there or wait for the linked spouse to be established?

A: If the spouse has been set up as a linked spouse because they have a different Medicare status from the retiree, they have their own record and enrollment and should not also be added as a dependent to the retiree's record.

Q: In Cardinal, how are the dependents added for Retiree Health Care plans?

A: They are entered the same way dependents are added for active employees. Ideally, the retiree is entering the dependents themselves through ESS.

Q: What happens when an employee who is set to transition to LTD, decides to retire instead at the last minute, but we are not aware of that and we key LTD separation. Will VRS take care of moving the employee from LTD to Retirement?

A: Yes. When an employee transitions from LTD to retirement, VRS will make the necessary changes in Cardinal.

Q: As an interfacing agency, how much do we need to do in Cardinal online once the retirement date has been sent?

A: The separation and the changing of the Email Option can all be handled through the Employee Data Upload interface file.

Q: Will Health Insurance Credit option be the same as it's always been?

A: Yes. No policy changes.

Q: Can you demonstrate split contract for dependent who is also Medicare eligible? I have someone retiring 11/1 with that situation now.

A: The agency BA does not establish the split contract or the retiree elections for VRS retirees. The BAs only key for ORP retirees. The BN361 ORP Retiree Guide walks through creating the split contract.

Q: Do retirees use the "New Hire" enrollment guide to see steps on using ESS? I would like to provide a step-by-step guide to our retirees, at least while the process is so new.

A: Yes, it is the exact same process. Refer to the **Benefit Enrollment (New Hire)** section of the BN361 Enrollment Steps for an Employee job aid.

Q: If we key these in advance (suspense) how will they get to VRS? Especially if we need to put them on leave prior to the actual retirement date as well? And how will this affect security?

A: If you key the retirement with a future date, the separation will not process to VNAV through the Cardinal interface, therefore you will need to process that separation in VNAV manually. You can key the leave transaction, then the future dated retirement transaction, and change their email address when they turn in their badge and laptop. You will then inform the retiree to set up their Cardinal account using their personal email address.

Q: Does the email address need to be updated in VRS and Cardinal or just Cardinal?

A: The Email Option has to be changed in Cardinal by the agency. The retirement paperwork requests the email address and VRS will enter that email address in VNAV for the employee, if necessary.

Q: It was said not to send Adv 65 Enrollment forms to OHB. Is this true for ORP as well or only VRS retirees?

A: VRS Adv 65 forms go to VRS. ORP retirement should be keyed by the agency.

Q: Will there be a new action reason for LWOP Personal for pending LTD?

A: Please use the Action - Unpaid Leave, Reason - personal for this "gap LTD period" when you are waiting for the LTD claim approval.

Q: Where do we enter the STD Max date in Cardinal?

A: There is no place in Cardinal to enter the STD Max date at this time.

Q: For LTD transactions, which transactions trigger VNAV to transact the separation from the agency and roll to VRS employer? LTD (Reed) vendor or Agency Separation transaction?

A: You cannot key the Term LTD until after the LTD claim has been approved by the TPA Group. The two factors are: 1) The LTD claim is approved in VNAV by the TPA, AND 2) agency keys the term LTD. Both completed will initiate the job data employment record in the VRSRT Business Unit.

Q: Can you confirm how current Cardinal members will receive their Employee ID to ensure they can enroll and see their account. We are hearing consistently that they are not able to enroll. Also, what is the best number for them to call in order to get help to get into Cardinal?

A: The Employee ID will not change. It is the responsibility of the agency HR/BN Administrator to communicate email address changes that require the employee to register again in Okta in order to access Cardinal. A VCCC help desk ticket must be logged in order for the Cardinal team to provide assistance.

Q: I do not believe the ACA Eligibility was covered (part of the job aid). Is this to be done on the retiree's record, as well as updating the Medicare information?

A: ACA for the retirement record will be managed by VRS, not the agency. The VRS Retirement and LTD Processes for HR and BN Admins job aid has been revised, therefore please reference the most current version.

Q: Once an employee is placed on LTD status, do we continue to extend LTD status in Cardinal like we did in PMIS?

A: No, you will no longer keep an LTD transaction going as you did in PMIS because you are keying this with Action - Termination, Reason - LTD and if that employee wants the COV retirement health care, their record will live under VRSRT.

Q: **Once we separate the employee in Cardinal, do we need to set up a new record for regular retirees?**

A: No. This happens via an interface from VNAV to Cardinal, which is owned by VRS.

Q: When the employee applies for retirement in myVRS, but does not tell the agency before the VRSRT job record is created in Cardinal by the Employee Data Upload from VRS can we still proceed with the "Agency updates Medicare data in Cardinal" step at that point?

A: Yes, the agency can enter the Medicare information into Cardinal at any time while the employee is still active within that agency.

Q: If the employee is not 65 at retirement application (say they applied in myVRS in August), but turns 65 a few days before their January retirement date, when do we enter the Medicare info in Cardinal?

A: The agency BA would enter the Medicare information into Cardinal at any time using a 1-1-2023 effective date.