

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 the separation into Cardinal.

Prior to beginning this process, review the Job Aid titled **HR351 Using a 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
- 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 the correct cause of separation.

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

- Benefit status is updated in Cardinal Benefits (BN) and 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 prevent a paysheet from being created for the employee



Separation Statuses Overview (continued)

Agency HR must coordinate with Agency Payroll and Agency Benefits Administrator (BA) for final pay, (e.g., salary, OT, leave payout) due to the employee. Additional steps may be needed to create a 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 **Performing a Mass Upload**. 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 (18 months) 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 Managing Terminations and Transfers** for more details. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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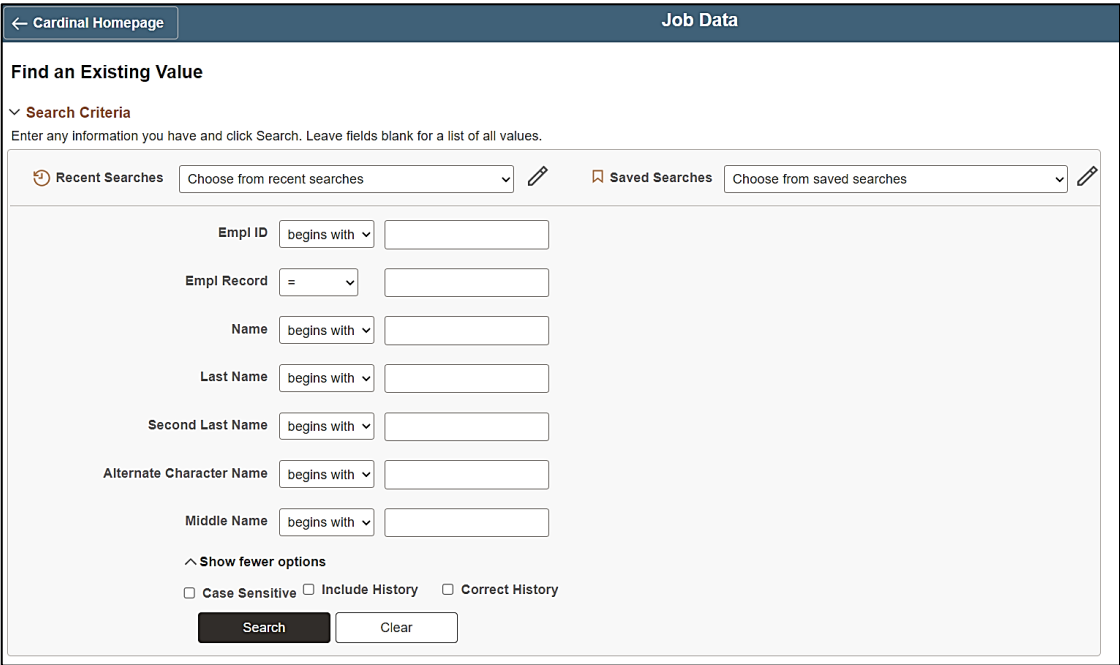


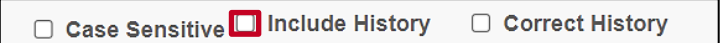
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Revision History

Revision Date	Summary of Changes
3/23/2026	Updated to include the necessary step to add the Tax Location Code in the Retirement – ORP Retiree section .
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1; Section 2 ; after Step 1; Section 3 , after Step 1; Section 4 , after Step 1; Section 5 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

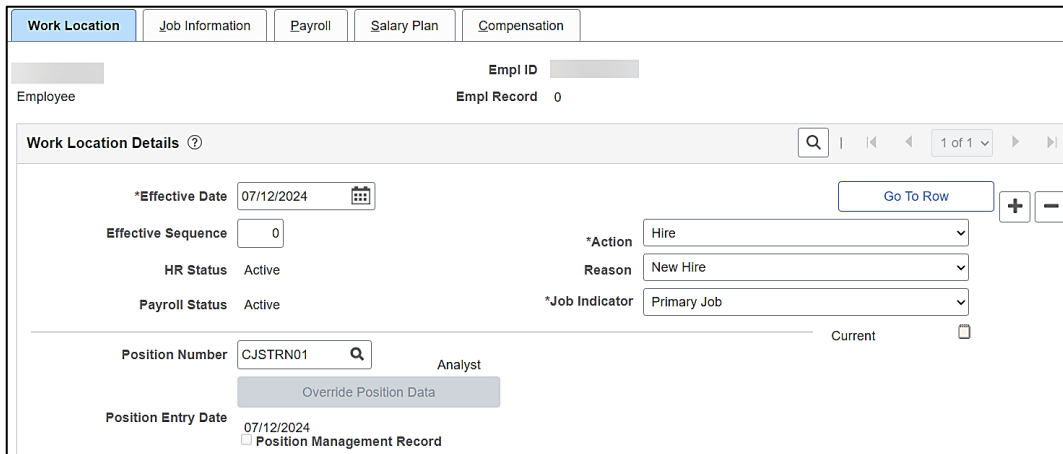
Termination - Voluntary


Step	Action
1.	Navigate to the Job Data page using the following path: NavBar > Menu > Workforce Administration > Job Information > Job Data
<p>The Job Data Find an Existing Value Search page displays.</p> 	
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
3.	<p>Select the Include History checkbox option.</p> 



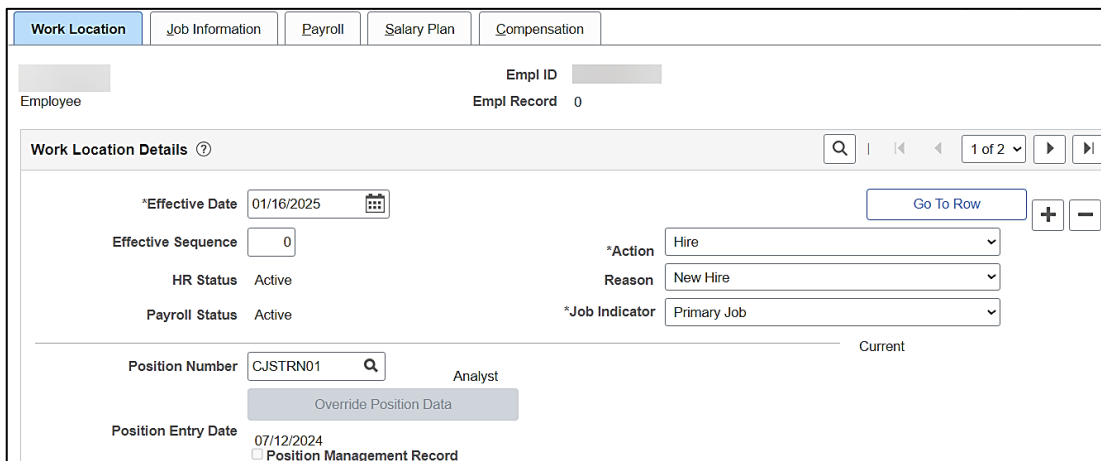
Step	Action
4.	Click the Search button. 

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









5.	Click the Add a New Row icon (+) to add a new effective dated row. 
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The **Work Location** page refreshes with the new effective dated row displayed.



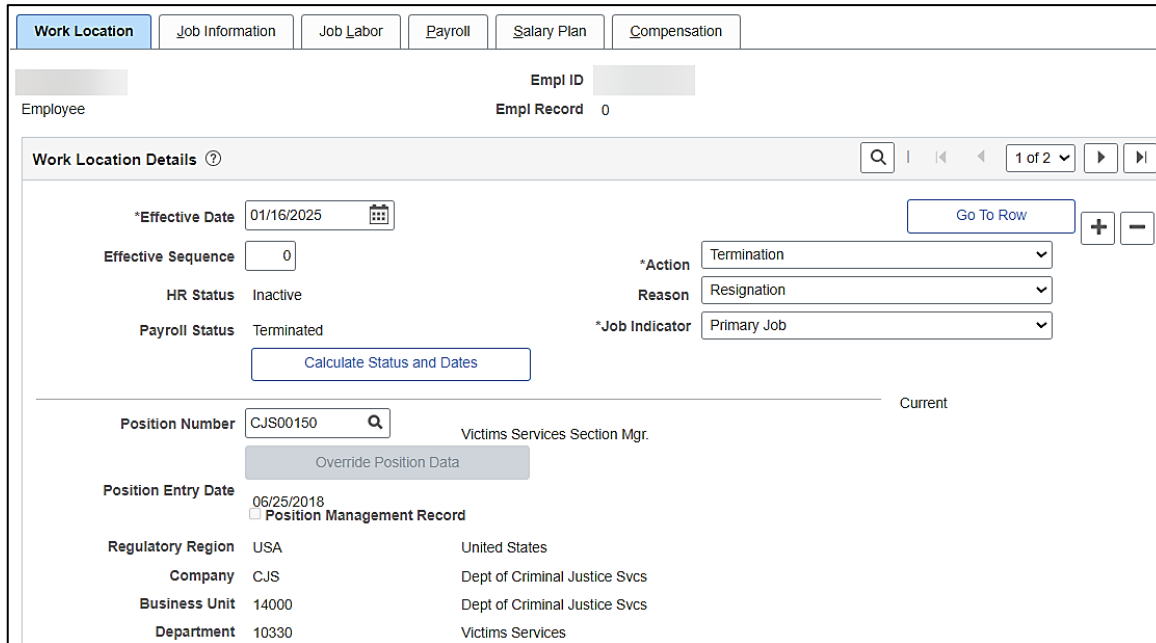


Step	Action
	<p>When a new row is created, the row count increases by one and the Effective Date field displays the current date.</p>
6.	<p>Update the effective date as needed using the Effective Date Calendar icon.</p> <div data-bbox="293 548 805 632" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <input type="text" value="01/16/2025"/> </p> </div>
	<p>Set the effective date to be one day after the employee’s last day worked. The 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).</p> <p>If an employee’s last day is “1/15/2025”, the effective date of the termination should be “1/16/2025”. 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.</p>
7.	<p>Click the Action field dropdown button and select “Termination”.</p> <div data-bbox="293 1003 1373 1123" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <input type="text" value="01/16/2025"/>  Go To Row <input type="button" value="+"/> <input type="button" value="-"/></p> <p>Effective Sequence <input type="text" value="0"/> *Action <input type="text" value="Termination"/></p> <p>HR Status Inactive Reason <input type="text"/></p> </div>
8.	<p>Click the Reason field dropdown button and select the applicable reason.</p> <div data-bbox="293 1213 1373 1333" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <input type="text" value="01/16/2025"/>  Go To Row <input type="button" value="+"/> <input type="button" value="-"/></p> <p>Effective Sequence <input type="text" value="0"/> *Action <input type="text" value="Termination"/></p> <p>HR Status Inactive Reason <input type="text" value="Resignation"/></p> </div>
	<p>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.</p> <p>For further information on Action Reasons, see the Job Aid titled HR351 Action Reason Codes. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>

Step	Action
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The **Work Location** page refreshes.

Note: After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update.



9.	<p>Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Terminated”.</p> <div style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Terminated</p> </div>
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10.	<p>Click the Save button.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px;">Save</div> <div style="padding: 2px 10px;">Return to Search</div> <div style="padding: 2px 10px;">Notify</div> <div style="padding: 2px 10px;">Refresh</div> </div> </div>
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	<p>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.</p> <div style="border: 2px solid red; padding: 10px; margin: 10px 0;"> <p>Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)</p> <p>Date of Death on personal data gets updated for the current transaction.</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> OK Cancel </div> </div>
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Step	Action
11.	<p>Click the OK button.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)</p> <p>Date of Death on personal data gets updated for the current transaction.</p> <div style="text-align: center;"> <input style="border: 2px solid red; margin-right: 10px;" type="button" value="OK"/> <input type="button" value="Cancel"/> </div> </div>

The **Work Location** page redisplay.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee
Empl ID

Empl Record
0

Work Location Details Q | << 1 of 2 >> | >>>

*Effective Date

Effective Sequence

HR Status

Payroll Status

*Action

Reason

*Job Indicator

Position Number

Position Entry Date

Regulatory Region

Company

Business Unit

Department

Department Entry Date

Location

Establishment ID

Victims Services Section Mgr.

United States

Dept of Criminal Justice Svcs

Dept of Criminal Justice Svcs

Victims Services

Washington Building

Dept of Criminal Justice Serv.

Date Created

Last Start Date

Last Date Worked

Termination Date

Override Last Date Worked

STD Claim Number

Layoff Notice Date

Recall Eligibility Flag

Turn Off Auto Pay

Yes No



The employee's email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. Access is provided to Cardinal for 18 months after the termination date.

12.	<p>Navigate to the Modify a Person page using the following navigation:</p> <p>NavBar > Menu > Workforce Administration > Personal Information > Modify a Person</p>
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Step	Action
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The **Modify a Person** page for the employee displays with the **Biographical Details** tab displayed by default.

Biographical Details | Contact Information | Regional | VA Person Info

Person ID [Redacted]

Name [Redacted] | 1 of 1 | View All

Effective Date 09/23/2022 | + -

Format Type English

Display Name [Redacted] | View Name

Biographic Information

Date of Birth 10/04/1976 | Years 48 | Months 3

Date of Death [Redacted]

Birth Country USA | United States

Birth State [Redacted]

Birth Location [Redacted] | Exclude Contact Information?

Biographical History | 1 of 1 | View All

*Effective Date 09/23/2022 | + -

*Gender Female

*Highest Education Level Masters Level Degree

*Marital Status Married | As of 09/23/2022

Language Code [Redacted]

Alternate ID [Redacted]

Full-Time Student

13. Click the **Contact Information** tab.

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



Step	Action
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The **Contact Information** page displays.

Biographical Details
Contact Information
Regional
VA Person Info

Empl ID

Current Addresses

1-1 of 1
View All

Address Type	As Of Date	Status	Address		
Home	03/24/2022	A	100 MAIN ST RICHMOND, VA 99999 Prince George	View Address Detail	+ -

Phone Information

1-3 of 3
View All

*Phone Type	Telephone	Extension	Preferred		
Business	555/555-5555		<input checked="" type="checkbox"/>	+	-
Mobile	555/555-5555		<input type="checkbox"/>	+	-
Home	555/555-5555		<input type="checkbox"/>	+	-

Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, **except:**
 2. When no email address is available, select applicable email option and **ALWAYS** use noemail@virginia.gov

Email Addresses

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

14. Select the **Employee Provided Email** radio button option in the **Email Option Selection** section.

Email Option Selection

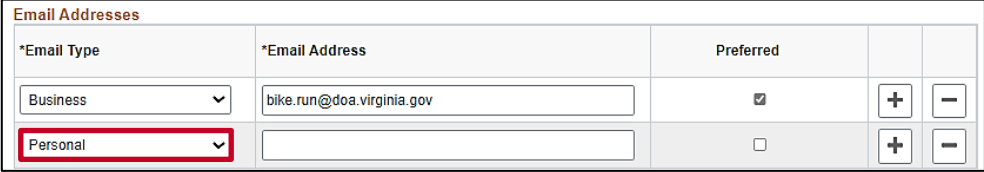
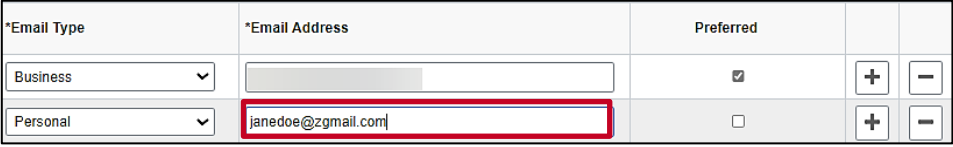
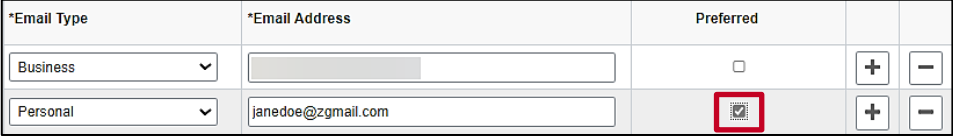
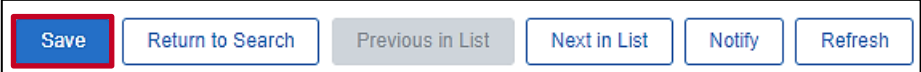
Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

15. Click the **Add a New Row** icon (+) to add a new email address.

Email Addresses

*Email Type	*Email Address	Preferred		
Business		<input checked="" type="checkbox"/>	<input checked="" style="width: 20px; height: 20px;" type="button" value="+"/>	-



Step	Action																				
16.	<p>Click the Email Type dropdown button and select “Personal”.</p>  <table border="1"> <thead> <tr> <th colspan="5">Email Addresses</th> </tr> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>bike.run@doa.virginia.gov</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	Email Addresses					*Email Type	*Email Address	Preferred			Business	bike.run@doa.virginia.gov	<input checked="" type="checkbox"/>	+	-	Personal		<input type="checkbox"/>	+	-
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*Email Type	*Email Address	Preferred																			
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Personal		<input type="checkbox"/>	+	-																	
17.	<p>Enter the personal email address in the Email Address field.</p>  <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input checked="" type="checkbox"/>	+	-	Personal	janedoe@zgmail.com	<input type="checkbox"/>	+	-					
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Business		<input type="checkbox"/>	+	-																	
Personal	janedoe@zgmail.com	<input checked="" type="checkbox"/>	+	-																	
19.	<p>Click the Save button.</p>  <table border="1"> <tr> <td>Save</td> <td>Return to Search</td> <td>Previous in List</td> <td>Next in List</td> <td>Notify</td> <td>Refresh</td> </tr> </table>	Save	Return to Search	Previous in List	Next in List	Notify	Refresh														
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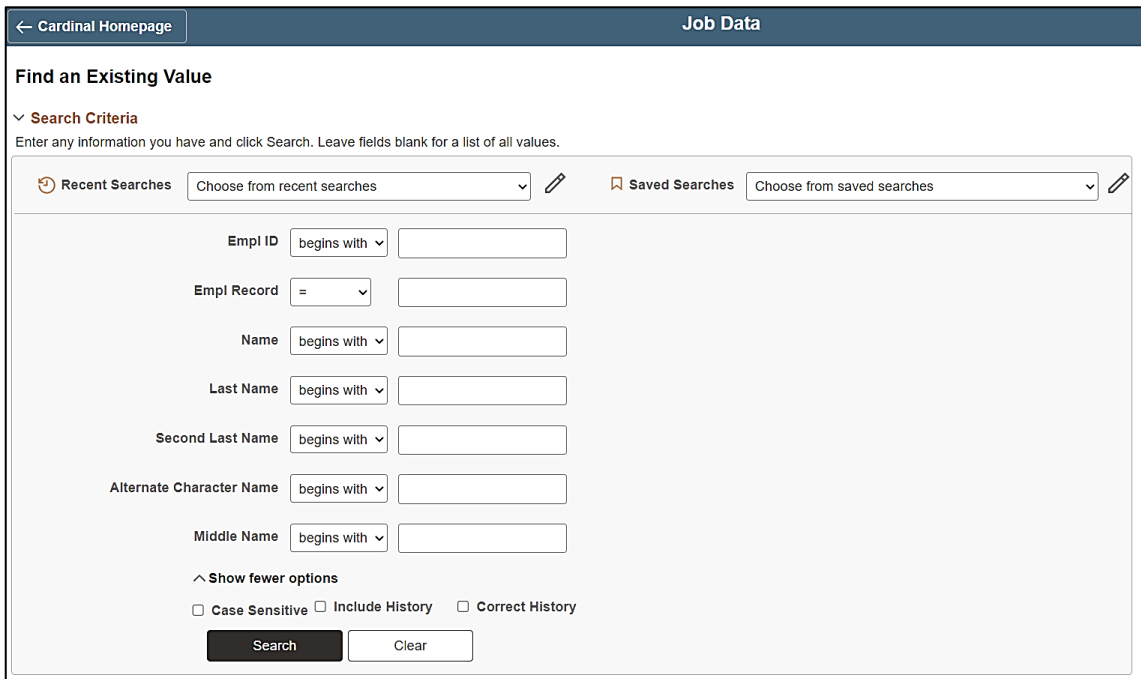


Step	Action																																														
	<p>The Contact Information page refreshes.</p> <div data-bbox="295 432 1341 1392" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> Biographical Details Contact Information Regional VA Person Info </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> ██████████ Empl ID ██████████ </div> <p>Current Addresses</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> 🗒️ 🔍 1-1 of 1 View All </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Address Type</th> <th>As Of Date</th> <th>Status</th> <th>Address</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Home</td> <td>03/24/2022</td> <td>A</td> <td>100 MAIN ST RICHMOND, VA 99999 Prince George</td> <td>View Address Detail</td> <td style="text-align: center;">+ -</td> </tr> </tbody> </table> <p>Phone Information</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> 🗒️ 🔍 1-3 of 3 View All </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>555/555-5555</td> <td></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> <tr> <td>Mobile</td> <td>555/555-5555</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> <tr> <td>Home</td> <td>555/555-5555</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> <p>Email Option Selection</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 5px;"> <input type="radio"/> Agency Provided Email <input type="radio"/> Pending Agency Provided Email <input checked="" type="radio"/> Employee Provided Email </div> <p style="font-size: small;">1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except: 2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov</p> <p>Email Addresses</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> </div>	Address Type	As Of Date	Status	Address			Home	03/24/2022	A	100 MAIN ST RICHMOND, VA 99999 Prince George	View Address Detail	+ -	*Phone Type	Telephone	Extension	Preferred			Business	555/555-5555		<input checked="" type="checkbox"/>	+	-	Mobile	555/555-5555		<input type="checkbox"/>	+	-	Home	555/555-5555		<input type="checkbox"/>	+	-	*Email Type	*Email Address	Preferred			Personal	janedoe@zgmail.com	<input checked="" type="checkbox"/>	+	-
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Personal	janedoe@zgmail.com	<input checked="" type="checkbox"/>	+	-																																											
20.	<p>Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report</p>																																														
21.	<p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p>Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the HCM Human Resources Reports Catalog. The HCM Human Resources Reports Catalog can be found on the Cardinal website under Resources.</p>																																														

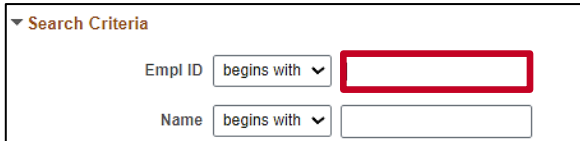
Termination – Involuntary (except Layoff)

Step	Action
1.	Navigate to the Job Data page using the following path: NavBar > Menu > Workforce Administration > Job Information > Job Data


The **Job Data Find an Existing Value Search** page displays.



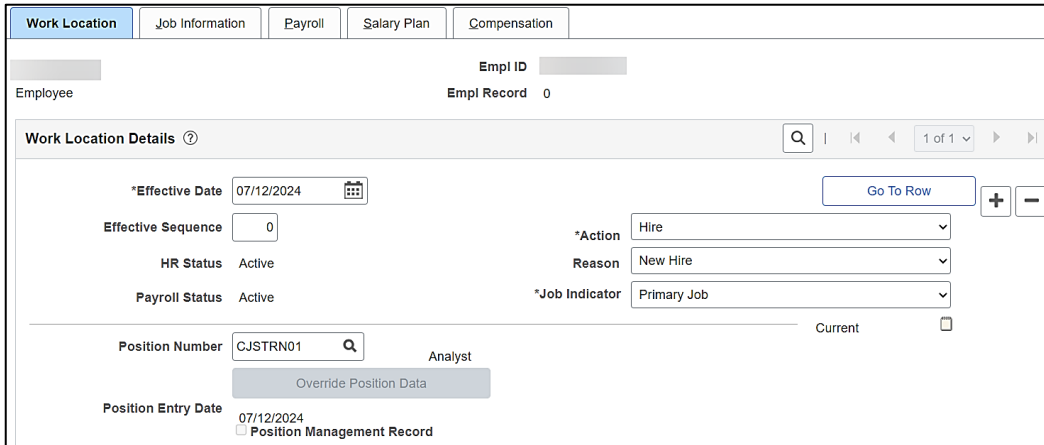

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

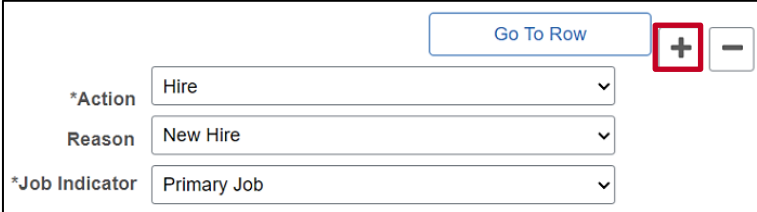
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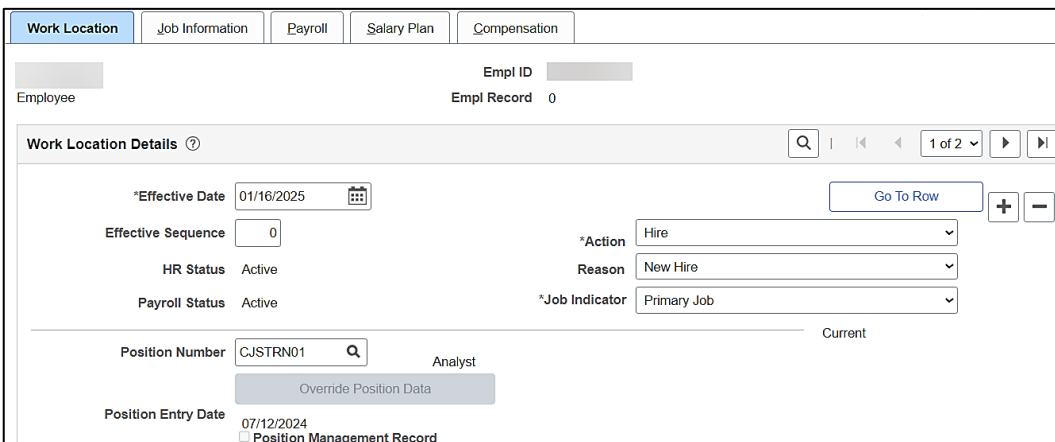
Step	Action
3.	Click the Search button. 

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









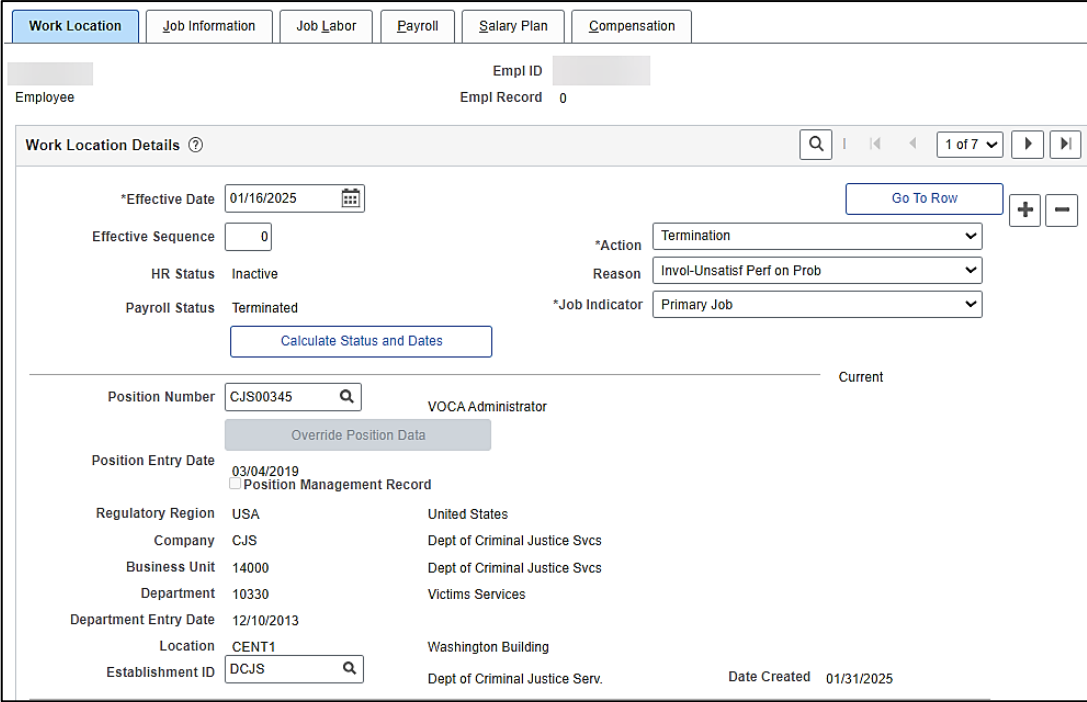
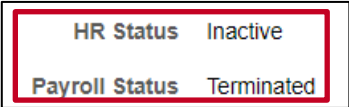
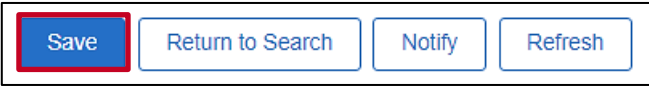

4.	Click the Add a New Row icon (+) to add a new effective dated row. 
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The **Work Location** page refreshes with the new effective dated row displayed.





Step	Action
	When a new row is created, the row count increases by one and the Effective Date field displays the current date.
5.	Update the effective date as needed using the Effective Date Calendar icon. <div data-bbox="293 548 805 632" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> *Effective Date 01/16/2025  </div>
	<p>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).</p> <p>If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". 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.</p>
6.	Click the Action field dropdown button and select "Termination". <div data-bbox="293 1003 1373 1125" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>*Effective Date 01/16/2025 </p> <p>Effective Sequence 0</p> <p>HR Status Inactive</p> </div> <div style="width: 45%; text-align: right;"> <p>Go To Row + -</p> <p>*Action Termination ▼</p> <p>Reason ▼</p> </div> </div> </div>
7.	Click the Reason field dropdown button and select the applicable reason. <div data-bbox="293 1213 1373 1335" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 45%;"> <p>*Effective Date 01/16/2025 </p> <p>Effective Sequence 0</p> <p>HR Status Inactive</p> </div> <div style="width: 45%; text-align: right;"> <p>Go To Row + -</p> <p>*Action Termination ▼</p> <p>Reason Invol-Unsatisf Perf on Prob ▼</p> </div> </div> </div>
	For further information on Action Reasons, see the Job Aid titled HR351 Action Reason Codes . This Job Aid can be found on the Cardinal website in Job Aids under Learning .

Step	Action
	<p>The Work Location page refreshes.</p> <p>Note: After selecting the Action and Action Reason, the HR Status and Payroll Status fields automatically update.</p> 
8.	<p>Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Terminated”.</p> 
9.	<p>Click the Save button.</p> 
	<p>The employee’s email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. Access is provided to Cardinal for 18 months after the termination date.</p>
10.	<p>Navigate to the Modify a Person page using the following navigation: NavBar > Menu > Workforce Administration > Personal Information > Modify a Person</p>



Step	Action
------	--------

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

11.	Click the Contact Information tab.
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Step	Action
------	--------

The **Contact Information** page displays.

Biographical Details
Contact Information
Regional
VA Person Info

[Redacted]
Empl ID [Redacted]

Current Addresses

[Grid Icon] [Search Icon]
1-1 of 1
View All

Address Type	As Of Date	Status	Address		
Home	03/24/2022	A	100 MAIN ST RICHMOND, VA 99999 Prince George	View Address Detail	+ -

Phone Information

[Grid Icon] [Search Icon]
1-3 of 3
View All

*Phone Type	Telephone	Extension	Preferred		
Business	555/555-5555		<input checked="" type="checkbox"/>	+	-
Mobile	555/555-5555		<input type="checkbox"/>	+	-
Home	555/555-5555		<input type="checkbox"/>	+	-

Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except:
 2. When no email address is available, select applicable email option and **ALWAYS** use noemail@virginia.gov

Email Addresses

*Email Type	*Email Address	Preferred		
Business	[Redacted]	<input checked="" type="checkbox"/>	+	-

12. Select the **Employee Provided Email** radio button option in the **Email Option Selection** section.

Email Option Selection

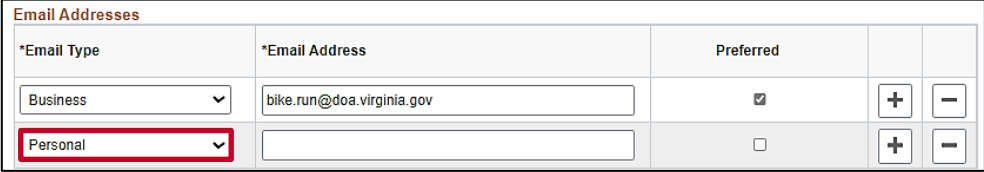
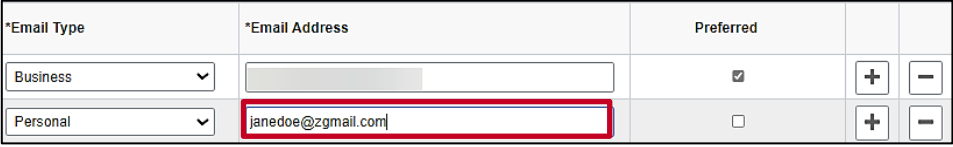
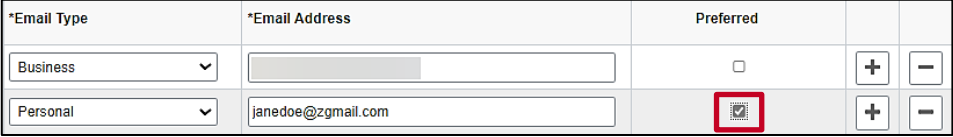
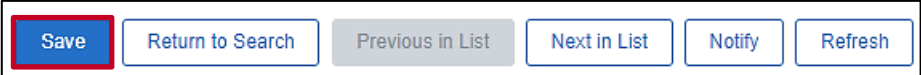
Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

13. Click the **Add a New Row** icon (+) to add a new email address.

Email Addresses

*Email Type	*Email Address	Preferred		
Business	[Redacted]	<input checked="" type="checkbox"/>	+	-



Step	Action
14.	<p>Click the Email Type field dropdown button and select “Personal”.</p> 
15.	<p>Enter the personal email address in the Email Address field.</p> 
16.	<p>Check the Preferred checkbox option.</p> 
17.	<p>Click the Save button.</p> 
18.	<p>Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report</p>
19.	<p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p>Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the Cardinal HCM Human Resources Reports Catalog. The Cardinal HCM Human Resources Reports Catalog can be found on the Cardinal website under Resources.</p>

Long Term Disability Not Working

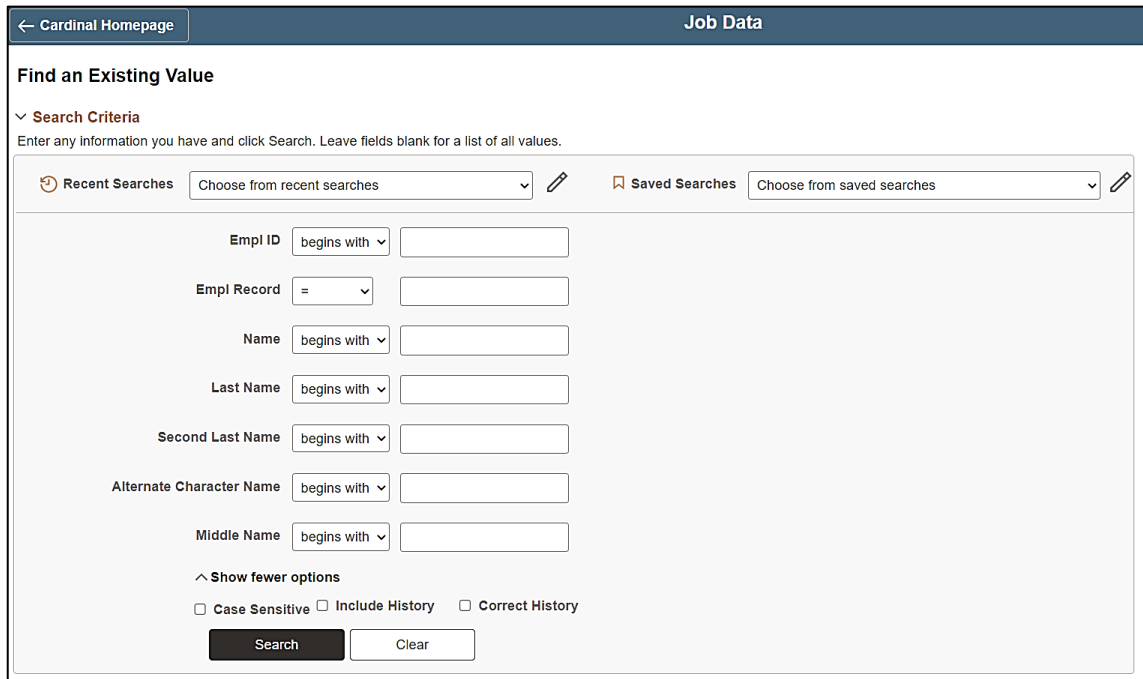
If there is a lag between STD workday 125 and the LTD claim approval, the Agency is asked to place the employee in Unpaid Leave of Absence (LOA), Personal (PER), and change benefits eligibility to COVA 100% EE Paid Grp Bill until the LTD claim is approved.

For further information about how to manage a Leave of Absence, see the Job Aid **HR351 Managing Leaves of Absence**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

After the LTD claim has been approved by the third-party administrator (TPA), enter the transaction to terminate (Termination/LTD) the employee. This action must be processed in Cardinal for the employee to enroll in the COVA LTD/Retiree healthcare plan.


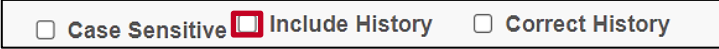

Step	Action
1.	Navigate to the Job Data page using the following path: NavBar > Menu > Workforce Administration > Job Information > Job Data

The **Job Data Find an Existing Value Search** page displays.

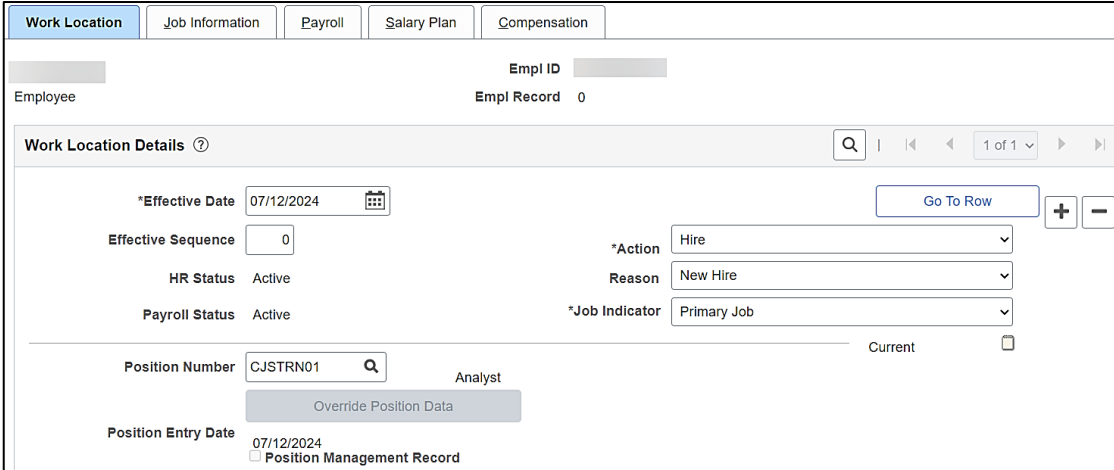


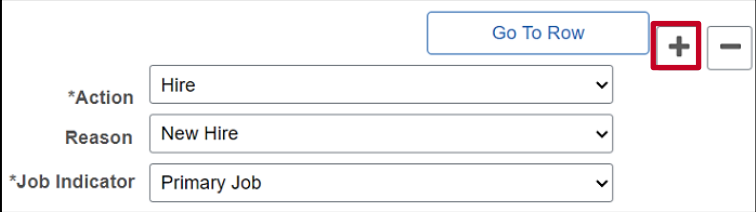

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

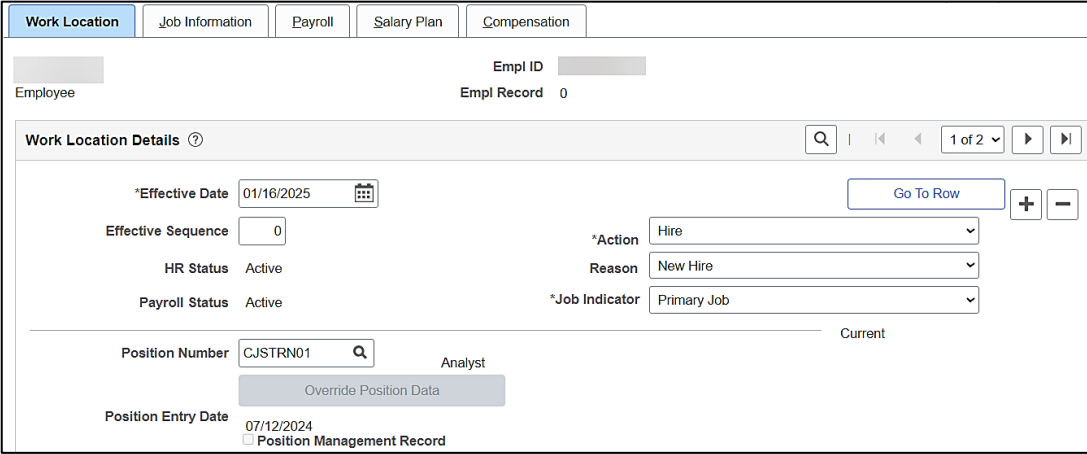



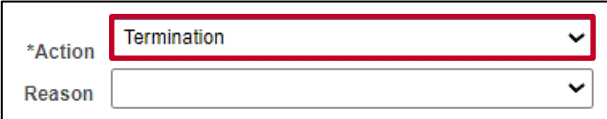
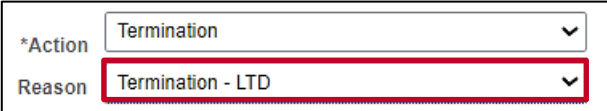


Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
3.	<p>Select the Include History checkbox option.</p> 
4.	<p>Click the Search button.</p> 


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



5.	<p>Click the Add a New Row icon (+) to add a new effective dated row.</p> 
----	---

Step	Action
	<p>The Work Location page refreshes with the new effective dated row displayed.</p> 
	<p>When a new row is created, the row count increases by one and the Effective Date field displays the current date.</p>
<p>6.</p>	<p>Update the effective date as needed using the Effective Date Calendar icon.</p> 
	<p>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).</p> <p>If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". 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.</p>
<p>7.</p>	<p>Click the Action dropdown button and select "Termination".</p> 
<p>8.</p>	<p>Click the Reason dropdown button and select "Termination - LTD".</p> 



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

The **Work Location** page refreshes.

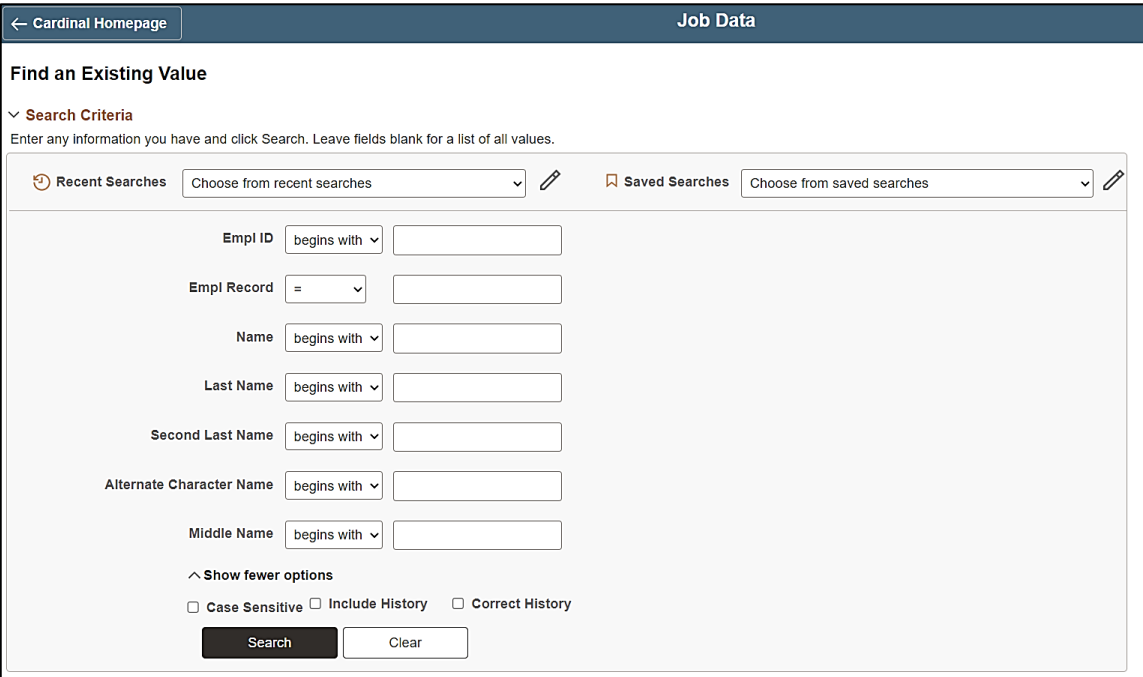


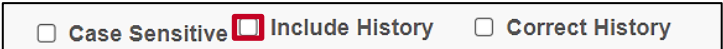
Note: After selecting the **Action** and **Action Reason**, the **HR Status** and **Payroll Status** fields automatically update.

The screenshot shows the 'Work Location Details' form for an employee. The 'Effective Date' is 01/16/2025. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Terminated'. The 'Action' is 'Termination' and the 'Reason' is 'Termination - LTD'. The 'Job Indicator' is 'Primary Job'. The 'Position Number' is CJS00335. The 'Position Entry Date' is 02/10/2023. The 'Regulatory Region' is USA, 'Company' is CJS, 'Business Unit' is 14000, 'Department' is 10610, and 'Location' is CENT1. The 'Termination Date' is 01/15/2025. The 'Last Start Date' is 02/10/2023 and the 'Last Date Worked' is 01/15/2025. The 'Date Created' is 02/03/2025.


9.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Terminated”. <div data-bbox="292 1501 641 1606" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Terminated</p> </div>
----	--

10.	Click the Save button. <div data-bbox="292 1690 933 1774" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px; background-color: #007bff; color: white;">Save</div> <div style="border: 1px solid black; padding: 2px 10px;">Return to Search</div> <div style="border: 1px solid black; padding: 2px 10px;">Notify</div> <div style="border: 1px solid black; padding: 2px 10px;">Refresh</div> </div> </div>
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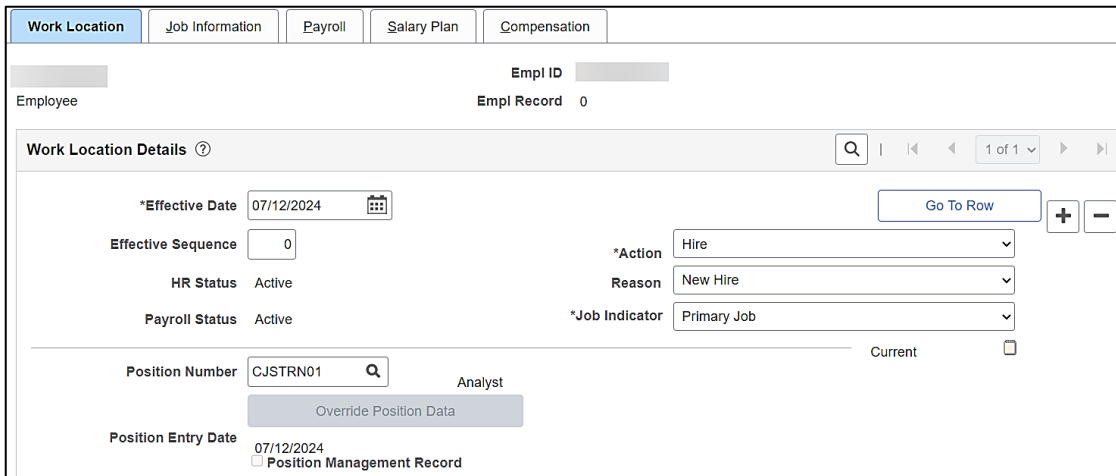
Retirement – VRS Retiree


Step	Action
1.	Navigate to the Job Data page using the following path: NavBar > Menu > Workforce Administration > Job Information > Job Data
<p>The Job Data Find an Existing Value Search page displays.</p> 	
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
2.	<p>Enter the employee's Employee ID in the EmpI ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
3.	<p>Select the Include History checkbox option.</p> 



Step	Action
4.	Click the Search button. 

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



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



Step	Action
------	--------

The **Work Location** page refreshes with the new effective dated row.



When a new row is created, the row count increases by one and the **Effective Date** field displays the current date.

6.

Update the effective date as needed using the **Effective Date Calendar** icon.



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 "1/15/2025", the effective date of the termination should be "1/16/2025". 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**.


7.

Click the **Action** dropdown button and select "Retirement".

8.

Click the **Reason** dropdown button and select the applicable reason.



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

The **Work Location** page refreshes.

Note: After selecting the **Action** and **Action Reason**, the **HR Status** and **Payroll Status** fields automatically update.


The screenshot shows the 'Work Location Details' form with the following visible data:

- Effective Date:** 01/16/2025
- Effective Sequence:** 0
- HR Status:** Inactive
- Payroll Status:** Retired
- Position Number:** CJS00170
- Company:** CJS
- Department:** 10620
- Location:** CENT1
- Action:** Retirement
- Reason:** Service Retirement
- Job Indicator:** Primary Job

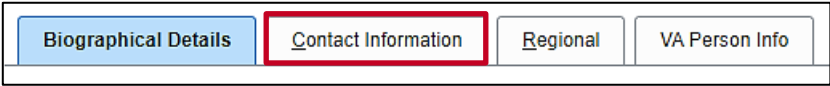
9.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Retired”. <div data-bbox="292 1512 584 1627" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Retired</p> </div>
----	--

10.	Click the Save button. <div data-bbox="292 1711 933 1795" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p>Save Return to Search Notify Refresh</p> </div>
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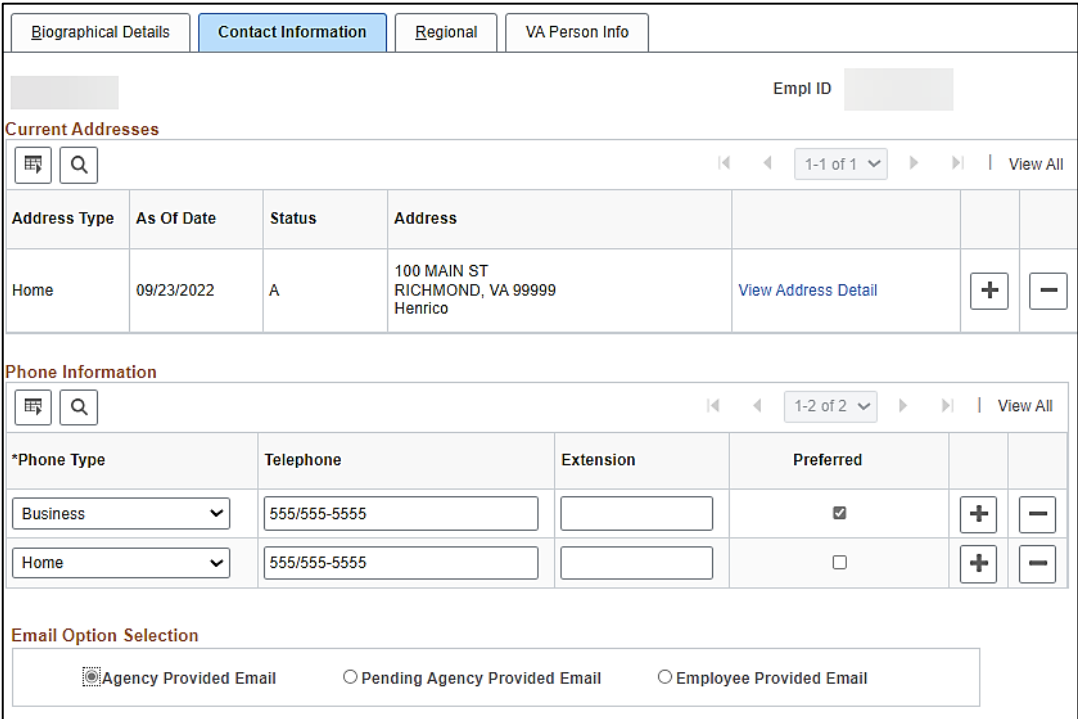
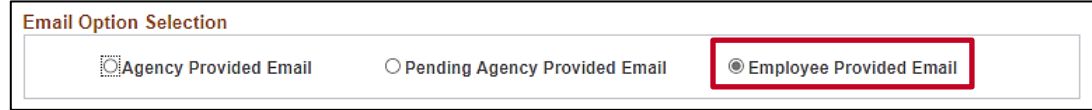

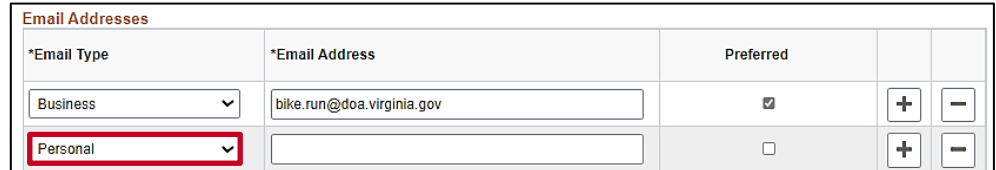


Step	Action
	The employee's email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. Access is provided to Cardinal for 18 months after the termination date.
11.	Navigate to the Modify a Person page using the following navigation: NavBar > Menu > Workforce Administration > Personal Information > Modify a Person

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

12.	Click the Contact Information tab. 
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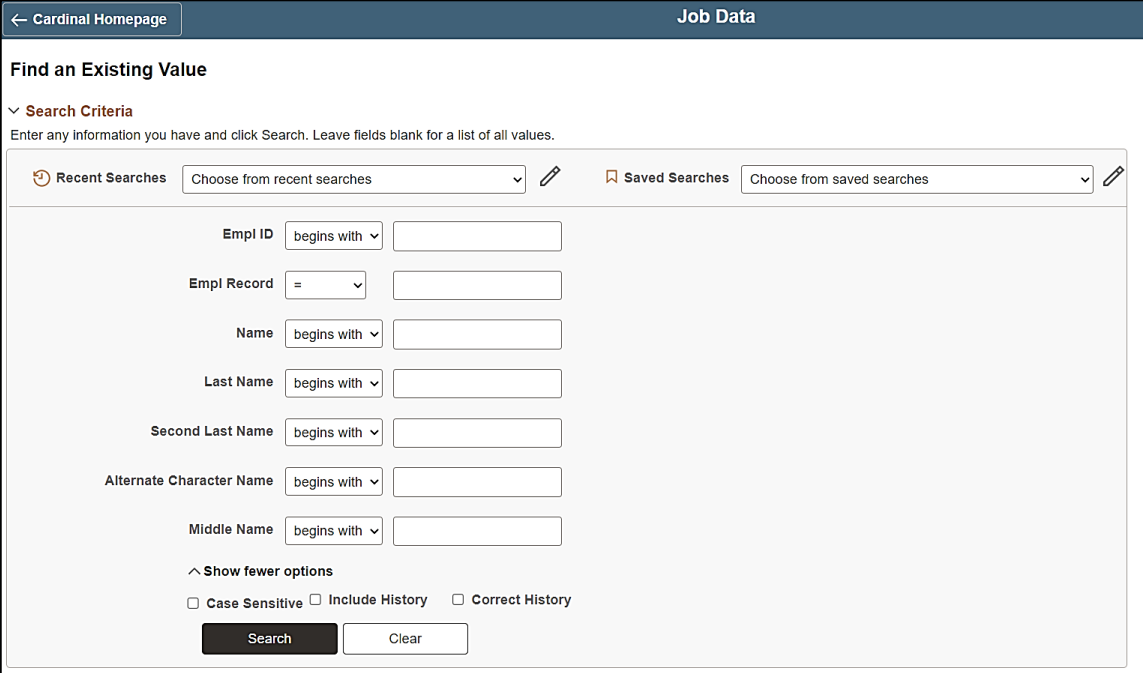





Step	Action
	<p>The Contact Information page displays.</p> 
13.	<p>Select the Employee Provided Email radio button option in the Email Option Selection section.</p> 
14.	<p>Click the Add a New Row icon (+) to add a new email address.</p> 
15.	<p>Click the Email Type field dropdown button and select "Personal".</p> 




Step	Action															
16.	<p>Enter the personal email address in the Email Address field.</p> <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@gmail.com</td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input checked="" type="checkbox"/>	+	-	Personal	janedoe@gmail.com	<input type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input checked="" type="checkbox"/>	+	-												
Personal	janedoe@gmail.com	<input type="checkbox"/>	+	-												
17.	<p>Check the Preferred checkbox option.</p> <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@gmail.com</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input type="checkbox"/>	+	-	Personal	janedoe@gmail.com	<input checked="" type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input type="checkbox"/>	+	-												
Personal	janedoe@gmail.com	<input checked="" type="checkbox"/>	+	-												
18.	<p>Click the Save button.</p> <table border="1"> <tr> <td>Save</td> <td>Return to Search</td> <td>Previous in List</td> <td>Next in List</td> <td>Notify</td> <td>Refresh</td> </tr> </table>	Save	Return to Search	Previous in List	Next in List	Notify	Refresh									
Save	Return to Search	Previous in List	Next in List	Notify	Refresh											
19.	<p>Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report</p>															
20.	<p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p>Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the Cardinal HCM Human Resources Reports Catalog. The Cardinal HCM Human Resources Reports Catalog can be found on the Cardinal website under Resources.</p>															

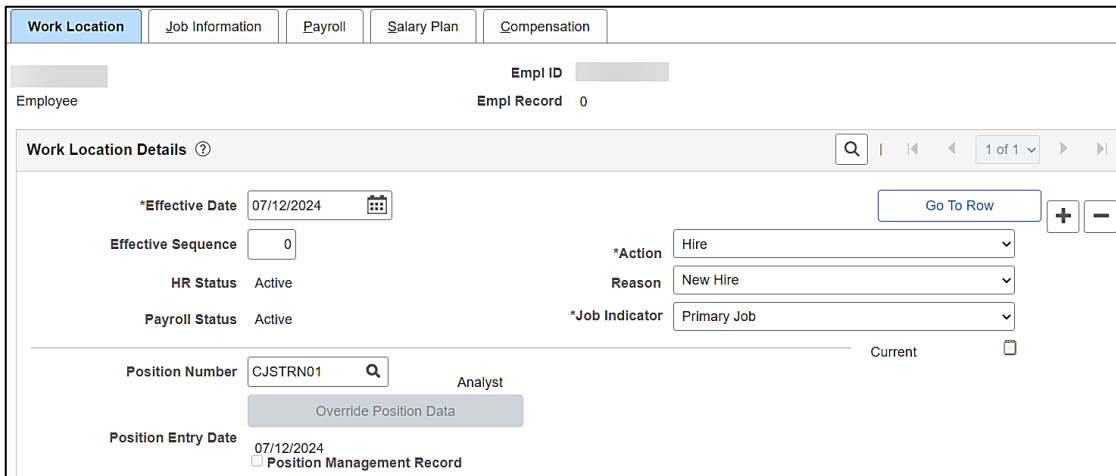
Retirement – ORP Retiree


Step	Action
1.	Navigate to the Job Data page using the following path: NavBar > Menu > Workforce Administration > Job Information > Job Data
<p>The Job Data Find an Existing Value Search page displays.</p> 	
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
2.	<p>Enter the employee’s Employee ID in the EmpI ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
3.	<p>Select the Include History checkbox option.</p> 



Step	Action
4.	Click the Search button. 

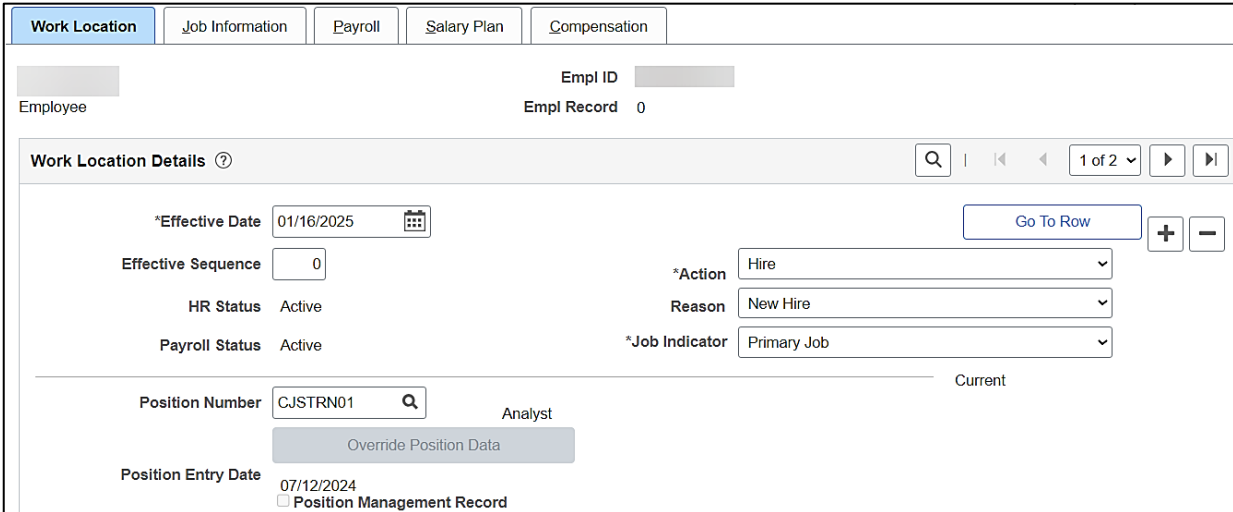
The **Job Data** page for the employee displays with the **Work Location** tab displayed by default.



5.	Click the Add a New Row icon (+) to add a new effective dated row. 
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Step	Action
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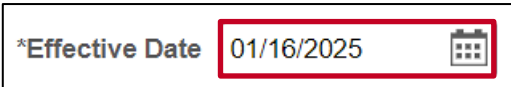
The **Work Location** page refreshes with the new effective dated row.




When a new row is created, the row count increases by one and the **Effective Date** field displays the current date.

6.

Update the effective date as needed using the **Effective Date Calendar** icon.




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 "1/15/2025", the effective date of the termination should be "1/16/2025". 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**.

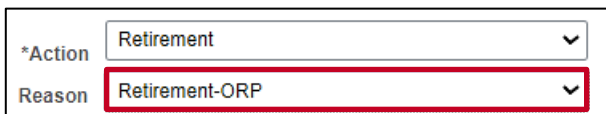
7.

Click the **Action** dropdown button and select "Retirement".




8.

Click the **Reason** dropdown button and select "Retirement – ORP".





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

The **Work Location** page refreshes.


Note: After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update.

The screenshot shows the 'Work Location Details' form. Key fields include:

- *Effective Date:** 01/16/2025
- Effective Sequence:** 0
- HR Status:** Inactive
- Payroll Status:** Retired
- *Action:** Retirement
- Reason:** Retirement-ORP
- *Job Indicator:** Primary Job
- Position Number:** CJS00327
- Position Entry Date:** 08/10/2018
- Regulatory Region:** USA
- Company:** CJS
- Business Unit:** 14000
- Department:** 10620
- Location:** MOBL2
- Establishment ID:** DCJS
- Termination Date:** 01/15/2025
- Last Date Worked:** 01/15/2025

9.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Retired”. <div data-bbox="292 1522 584 1627" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Retired</p> </div>
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10.	Click the Save button. <div data-bbox="292 1722 933 1795" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p> Save Return to Search Notify Refresh </p> </div>
-----	--

Step	Action
	Now the Agency HR Administrator should hire the employee into the ORP retirement position using a new employment instance.
11.	Navigate to New Employment Instance page using this path: NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance
<p>The following question will display.</p> <div data-bbox="373 695 1263 961" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> < Biographical Details New Employment Instance </div> <p style="margin-top: 10px;">Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </div> </div>	
12.	Click the No button to create a new employment instance. <div data-bbox="292 1050 1112 1291" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> < Biographical Details New Employment Instance </div> <p style="margin-top: 10px;">Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> </div> </div>
<p>The New Employment Instance page displays.</p> <div data-bbox="418 1381 1218 1675" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> < Biographical Details New Employment Instance </div> <div style="text-align: center; margin-top: 10px;"> <p>New Employment Instance</p> <p>Empl ID </p> <p>Empl Record 1</p> <div style="margin-top: 10px; text-align: center;"> <input style="background-color: #2c4e64; color: white; padding: 5px 15px;" type="button" value="Add Relationship"/> </div> </div> </div>	



Step	Action
13.	<p>Click the Add Relationship button to add job information for the new employee record.</p> <div data-bbox="293 432 1094 722" style="border: 1px solid black; padding: 10px;"> </div>
	<p>The new Job Record for the employee is displayed with the Work Location tab displayed by default.</p> <div data-bbox="293 814 1343 1520" style="border: 1px solid black; padding: 10px;"> </div>
14.	<p>The Effective Date field defaults to the current system date. Update this date as needed using the Calendar icon.</p> <div data-bbox="293 1640 695 1703" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date 01/16/2025 </p> </div>



Step	Action
	<p>The Action field defaults to “Hire”. Do not change.</p> <div style="border: 1px solid black; padding: 5px;"> <p>*Action <input type="text" value="Hire"/></p> <p>Reason <input type="text"/></p> </div>
15.	<p>Click the Reason dropdown button and select “Hire ORP Ret”.</p> <div style="border: 1px solid black; padding: 5px;"> <p>*Action <input type="text" value="Hire"/></p> <p>Reason <input type="text" value="Hir ORP Ret"/></p> </div>
16.	<p>Locate and select the ORP position for the Agency using the Position Number Look up icon.</p> <p>Note: Enter “%ORP” to search for the ORP Position Number.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Position Number <input type="text" value="CVAORP00"/> <input type="button" value="Q"/> ORP Retiree Position</p> </div>
17.	<p>Click the Job Information tab.</p> <div style="border: 1px solid black; padding: 5px;"> <p> <input type="button" value="Work Location"/> <input style="border: 2px solid red;" type="button" value="Job Information"/> <input type="button" value="Job Labor"/> <input type="button" value="Payroll"/> <input type="button" value="Salary Plan"/> <input type="button" value="Compensation"/> </p> </div>



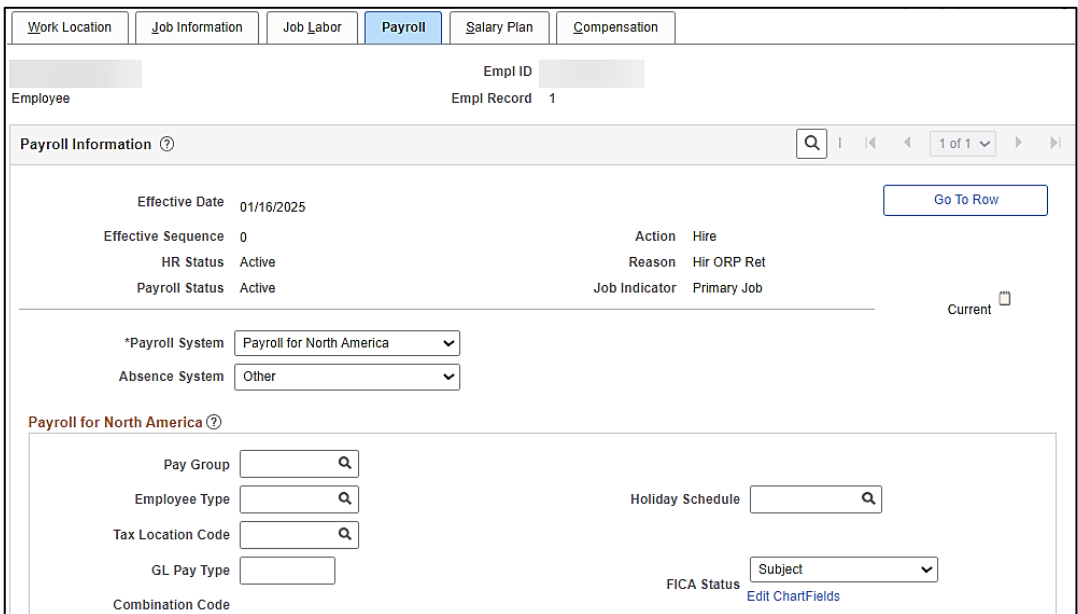

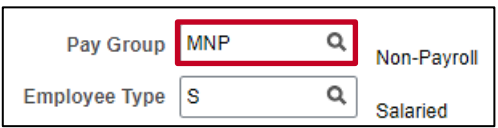
The **Job Information** page displays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation


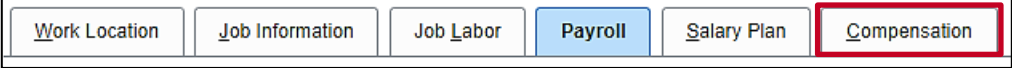
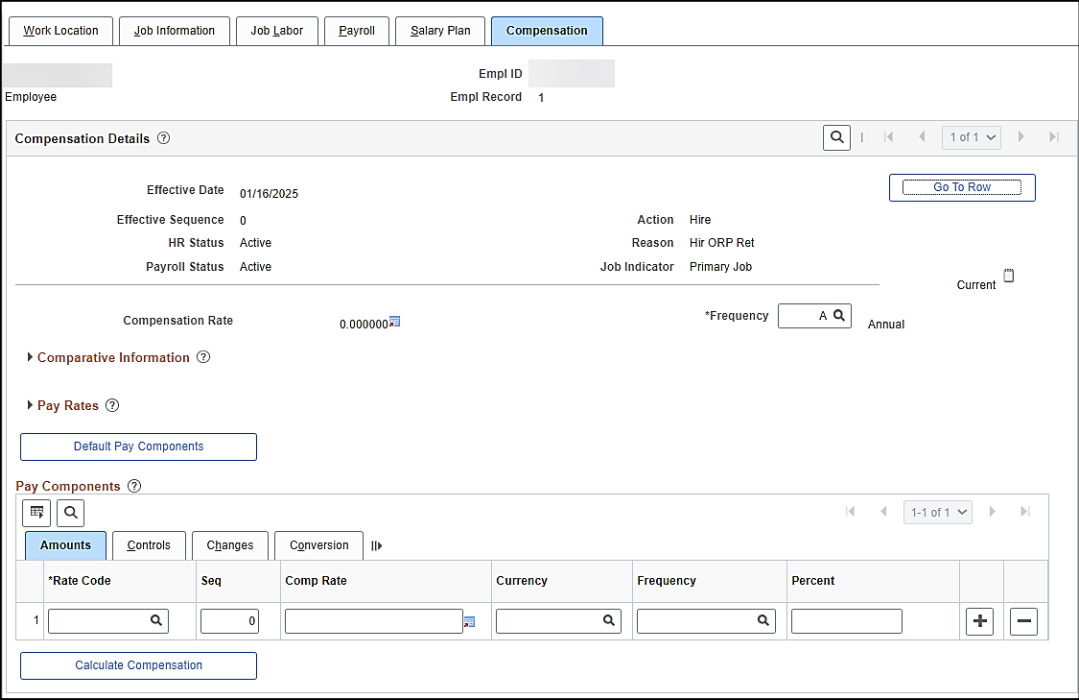


Employee
Empl ID
Empl Record 1

Job Information Details Q | < > 1 of 1 >

Effective Date	01/16/2025		Action	Hire
Effective Sequence	0		Reason	Hir ORP Ret
HR Status	Active		Job Indicator	Primary Job
Payroll Status	Active			
Current <input type="button" value="Go To Row"/>				
Job Code	ORPHBO	ORP Retiree	SOC Code	
Entry Date	01/16/2025	Employee	Supervisor Name	
Supervisor Level	E	Reports To	View Current Incumbents	
Regular/Temporary	Regular	Full/Part	Part-Time	
Empl Class	<input type="text"/>	*Officer Code	<input type="text" value="None"/>	
Regular Shift	Not Applicable	Shift Rate	<input type="text"/>	
Classified Ind	Classified	Shift Factor	<input type="text"/>	

Step	Action
18.	<p>Click the Empl Class dropdown button and select “ORPRetiree”.</p> 
19.	<p>Click the Payroll tab.</p> 
<p>The Payroll page displays.</p> 	
	<p>The Payroll System field defaults to “Payroll for North America”. Do not change. The Absence System field defaults to “Other”. Do not change.</p>
20.	<p>Click the Pay Group Look Up icon and select “MNP”.</p> <p>Note: This is the Non-Payroll pay group.</p> 



Step	Action
21.	Enter the applicable Tax Location Code in the Tax Location Code field. 
22.	Click the Compensation tab. 
The Compensation page displays. 	
23.	Click the Frequency Look up icon and change the selection from “A” to “M”. 
24.	Click the Defaults Pay Components button. 



Step	Action
25	Click the Calculate Compensation button. Note: No additional Pay Components fields should be entered. <div style="border: 1px solid red; padding: 5px; margin: 10px 0;"> <input type="button" value="Calculate Compensation"/> </div>

26.	Click the Benefits Program Participation link. <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> Job Data Employment Data Earnings Distribution Benefits Program Participation </div>
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The **Benefit Program Participation** page displays.

Benefit Program Participation

Employee Empl ID
Empl Record 1

Benefit Status ?
1 of 1

Benefit Record Number	1		Go To Row
Effective Date	01/16/2025	Action	Hire
Effective Sequence	0	Reason	Hir ORP Ret
HR Status	Active	Job Indicator	Primary Job
Payroll Status	Active		

*Benefits System Benefits Administration Benefits Employee Status Active


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

Benefits Administration Eligibility ?

BAS Group ID	Elig Fld 2	Elig Fld 3
Elig Fld 1	Elig Fld 5	Elig Fld 6
Elig Fld 4	Elig Fld 8	Elig Fld 9

Benefit Program Participation Details ?
1 of 1
View All

Effective Date	01/16/2025	Currency Code	USD
Benefit Program	PSX	Sys delivered empty Ben Pgm	

Step	Action
27.	<p>Use the Configuration Workbook to complete the Benefits Administration Eligibility Fields 2, 3, 8 & 9 based on the appropriate scenarios for the ORP Retiree.</p> <div data-bbox="293 468 1403 674" style="border: 1px solid black; padding: 5px;"> <p>Benefits Administration Eligibility ⓘ</p> <p>BAS Group ID <input type="text"/></p> <p>Elig Fld 1 <input type="text"/></p> <p>Elig Fld 2 <input type="text" value="007008000"/></p> <p>Elig Fld 3 <input type="text" value="N"/></p> <p>Elig Fld 4 <input type="text"/></p> <p>Elig Fld 5 <input type="text"/></p> <p>Elig Fld 6 <input type="text"/></p> <p>Elig Fld 7 <input type="text"/></p> <p>Elig Fld 8 <input type="text" value="12-12"/></p> <p>Elig Fld 9 <input type="text" value="RR-GB"/></p> </div>
	<p>For further information on Eligibility Fields, 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 Learning.</p>
28.	<p>Click the OK button.</p> <div data-bbox="293 898 686 968" style="border: 1px solid black; padding: 5px;"> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/></p> </div>
29.	<p>Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report</p>
30.	<p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p>Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the Cardinal HCM Human Resources Reports Catalog. The Cardinal HCM Human Resources Reports Catalog can be found on the Cardinal website under Resources.</p>