

Managing Terminations and Transfers Overview

This Job Aid provides information and step-by-step instructions for Agency Benefits Administrators (BAs) to manage termination and transfer Benefit Events.

When an employee is terminated from their Agency, a “TER” Benefit Event is automatically created in Cardinal. This “TER” Benefit Event will automatically be processed and finalized by the Benefit Administration process that runs each evening. If the Benefit Event needs to be manually processed prior to the evening run of the Benefits Administration process, complete the steps documented in the [Manually Processing a Termination Benefit Event \(TER\)](#) section of this Job Aid.

When an employee transfers out of their Agency, an “XFO” Benefit Event is created in Cardinal. The Sending Agency BA should process and finalize the “XFO” Benefit Event right away because this Benefit Event must be Finalized/Enrolled before the receiving Agency BA can process the “XFR” Benefit Event. The steps used to process this Benefit Event are documented in the [Processing a Transfer Out Benefit Event – Sending Agency](#) section of this Job Aid.

When an Inter-Agency transfer is processed for an employee, their Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments are not stopped or changed in any way. All other retirement enrollments are terminated once the Sending Agency processes the “XFO” Benefit Event. The steps used to process this Benefit Event are documented in the [Processing a Transfer In Benefit Event – Receiving Agency](#) section of this Job Aid.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process 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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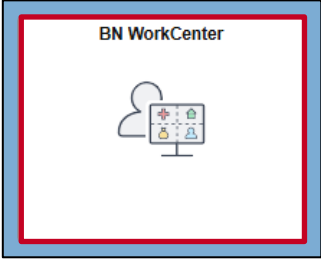
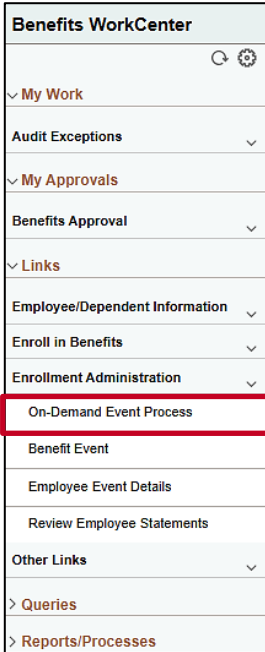
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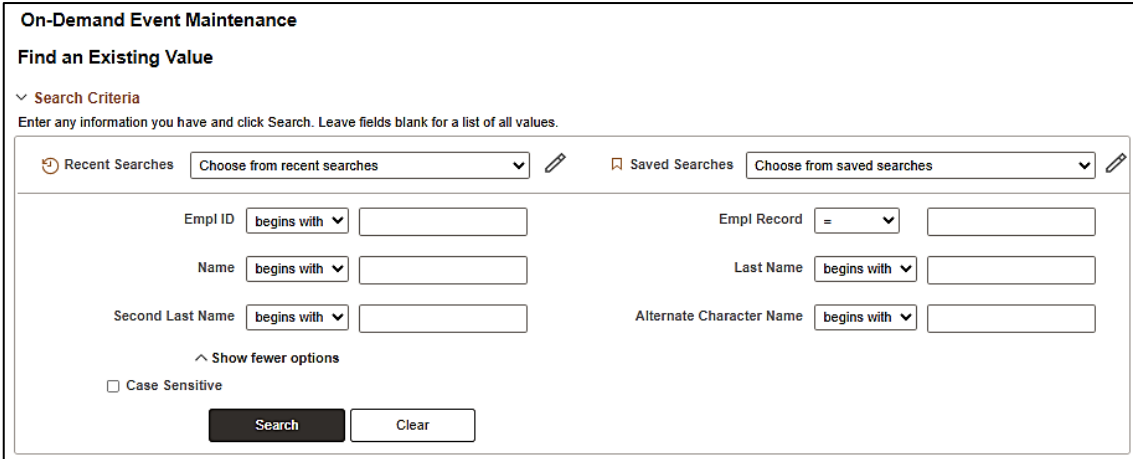


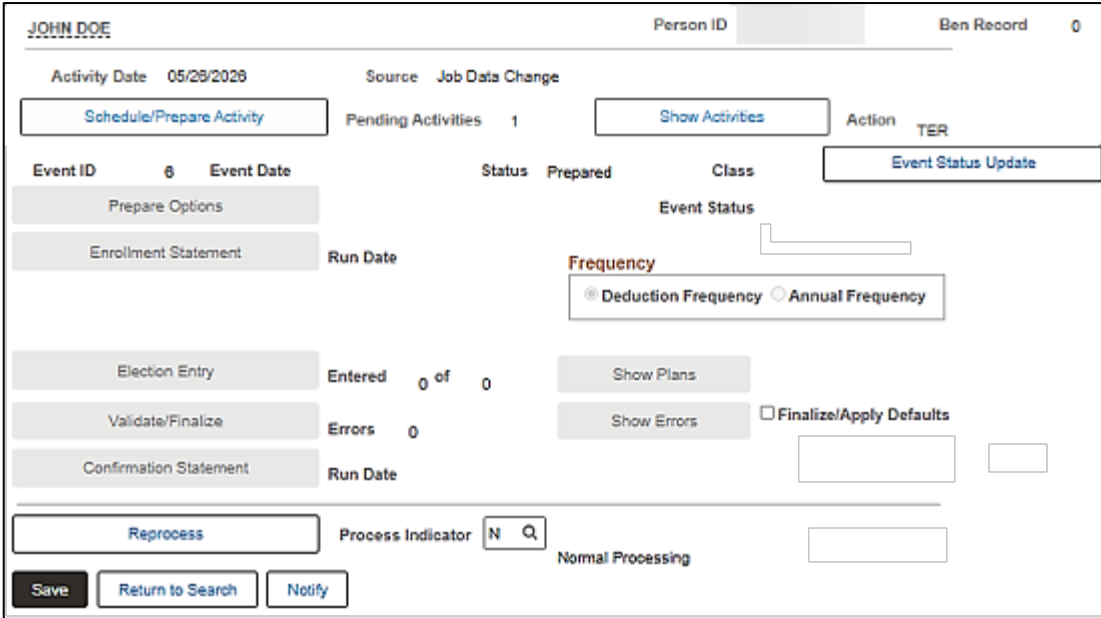
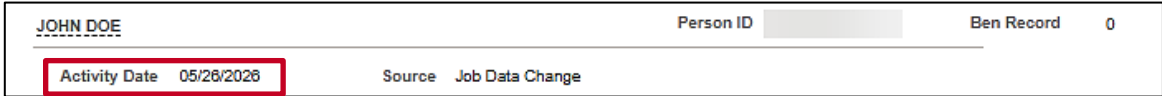
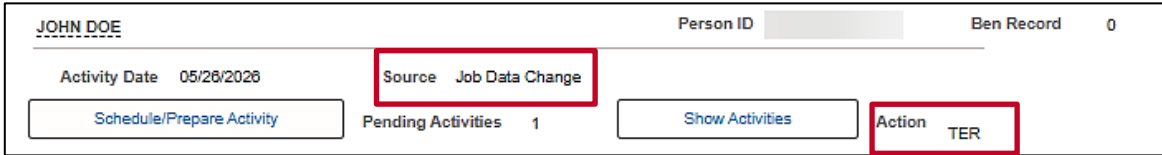
Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
12/8/2025	Notes added in all sections to provide additional information regarding the Schedule/Prepare Activity button.
3/1/2025	Updated the screenshots of the Search pages. Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Manually Processing a Termination Benefit Event (TER)

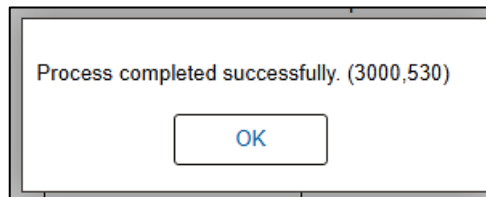
Step	Action
1.	Once the employee's Job Record has been terminated in Cardinal by an Agency Human Resources Administrator, navigate to the On-Demand Event Process page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > On-Demand Event Process Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
	Users can also access the On-Demand Event Process page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Process

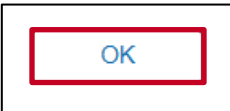
Step	Action
	The On-Demand Event Maintenance Find an Existing Value Search page displays. 
	 For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.
3.	Enter the employee's Employee ID in the Empl ID field. 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. 
4.	Click the Search button. 

Step	Action
The On-Demand Event Process page displays for the applicable employee. 	
5.	Review the Activity Date field. For Termination Events, this date auto-populates based on the effective date of the Termination transaction processed by HR. Ensure that this date is accurate. 
	The Source field will be “Job Data Change”. The Action field will default to “TER” (Termination). 
6.	Click the Schedule/Prepare Activity button to manually run the Benefits Administration process for this Benefit Event. 

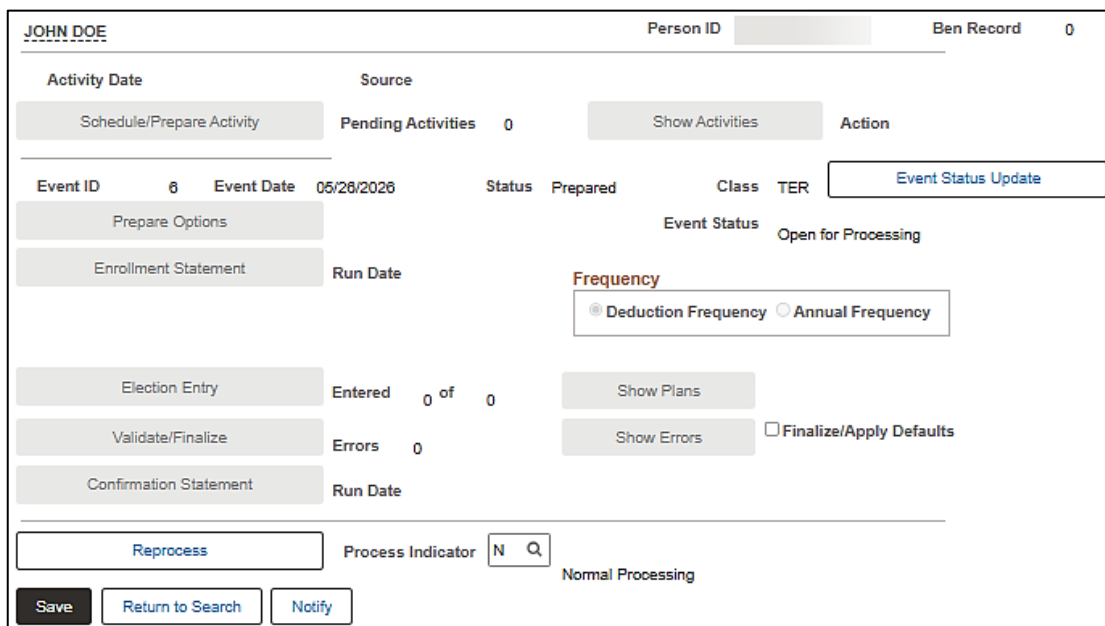
Step	Action
7.	If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a "0". In this case, proceed to Step 8. If the Pending Activities field displays a "1", click the Schedule/Prepare Activity button. Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. 

A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



8.	Click the OK button to close the message. 
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The **On-Demand Event Process** page redisplay.



JOHN DOE Person ID [] Ben Record 0

Activity Date [] Source [] Pending Activities 0 Show Activities Action

Event ID 6 Event Date 05/26/2026 Status Prepared Class TER Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

☒ Deduction Frequency ☐ Annual Frequency

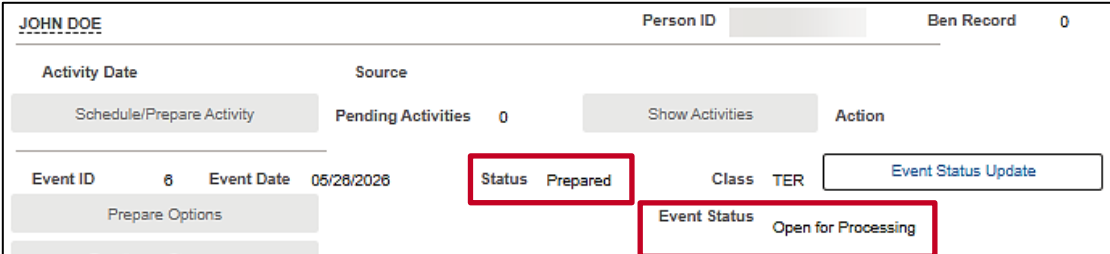
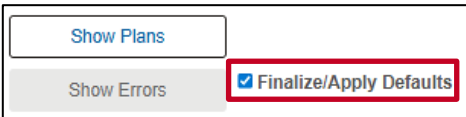
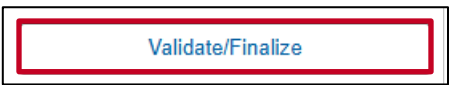
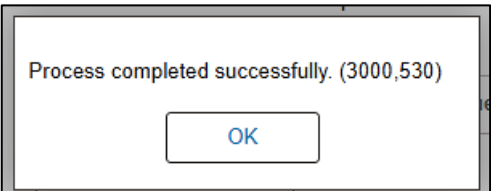
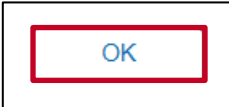
Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

Save Return to Search Notify

Step	Action
9.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. 
	If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.
10.	Select the Finalize/Apply Defaults checkbox option. 
11.	Click the Validate/Finalize button. 
	All benefits will be terminated for the employee once the Validate/Finalize button has been clicked.
A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	
12.	Click the OK button to close the message. 

Step	Action
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The **On-Demand Event Process** page redisplay.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 6

Event Date 05/26/2026

Status Finalized - Enrolled

Class TER

Event Status Update

Prepare Options

Event Status Closed to Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

Election Entry

Entered 0 of 0

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator N

Normal Processing

Save

Return to Search

Notify



The **Status** field will now display as “Finalized - Enrolled”.

The **Event Status** field will still display as “Closed to Processing”.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 6

Event Date 05/26/2026

Status Finalized - Enrolled

Class TER

Event Status Update

Prepare Options

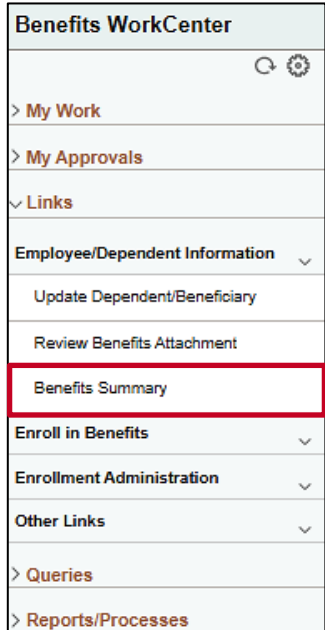
Event Status Closed to Processing

Enrollment Statement

Run Date

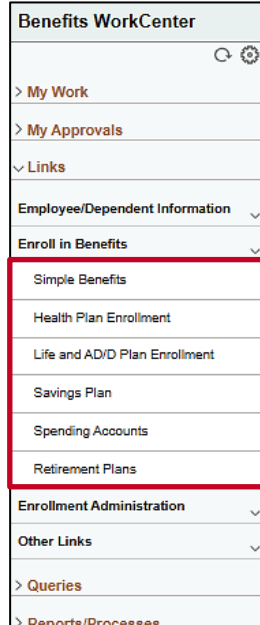


To review the employee's benefits and confirm that they have been terminated, navigate to the employee's **Benefits Summary** page from the **BN WorkCenter**, or review the employee's individual benefit pages (see navigations below).



Benefits WorkCenter

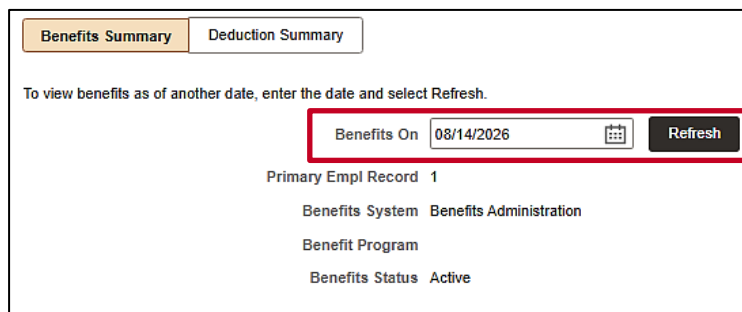
- > My Work
- > My Approvals
- > Links
- Employee/Dependent Information
 - Update Dependent/Beneficiary
 - Review Benefits Attachment
 - Benefits Summary**
- Enroll in Benefits
- Enrollment Administration
- Other Links
- > Queries
- > Reports/Processes



Benefits WorkCenter

- > My Work
- > My Approvals
- > Links
- Employee/Dependent Information
- Enroll in Benefits
 - Simple Benefits
 - Health Plan Enrollment
 - Life and AD/D Plan Enrollment
 - Savings Plan
 - Spending Accounts
 - Retirement Plans
- Enrollment Administration
- Other Links
- > Queries
- > Reports/Processes

Note: If the benefits termination date is in the future, users will need to change the date in the **Benefits On** field on the **Benefits Summary** page and click the **Refresh** button.



Benefits Summary | Deduction Summary

To view benefits as of another date, enter the date and select Refresh.

Benefits On: 08/14/2026 **Refresh**

Primary Empl Record 1

Benefits System: Benefits Administration

Benefit Program

Benefits Status: Active

Users can also access the **Benefits Summary** page using the following navigation path:
NavBar > Menu > Benefits > Review Employee Benefits > Benefits Summary

Individual Benefit Pages

Simple Benefits: **NavBar > Menu > Benefits > Enroll In Benefits > Simple Benefits**

Health Plan Enrollment: **NavBar > Menu > Benefits > Enroll In Benefits > Health Plan Enrollment**

Imputed Life: **NavBar > Menu > Benefits > Enroll In Benefits > Life and AD/D Benefits**

Savings Plan: **NavBar > Menu > Benefits > Enroll In Benefits > Savings Plan**

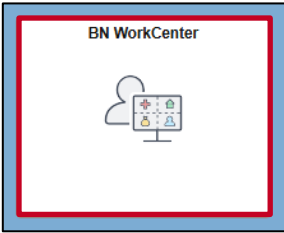
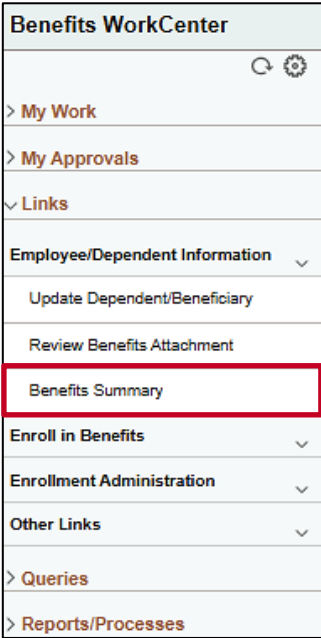
FSA Benefits: **NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts**

Retirement Plans: **NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans**

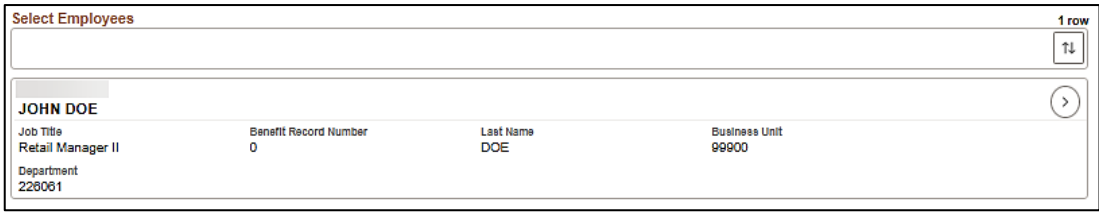
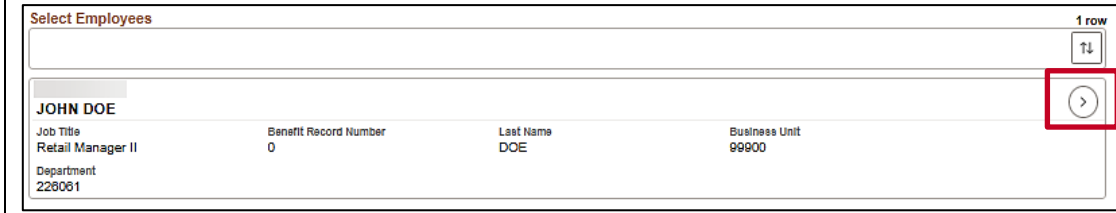
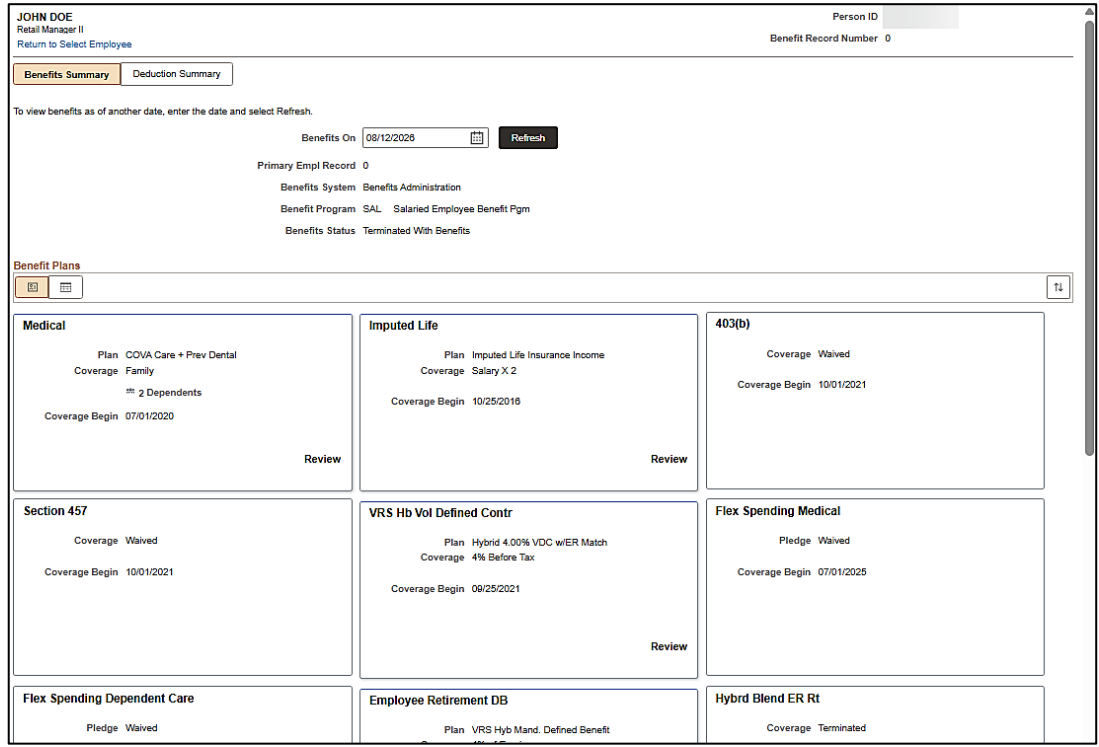
Processing a Transfer Out Benefit Event – Sending Agency

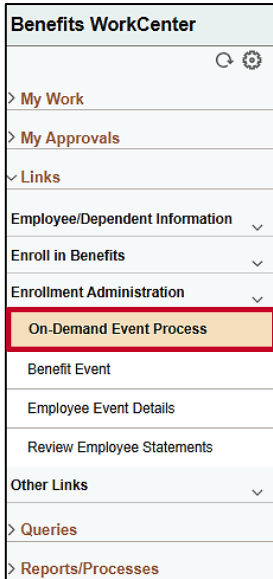
When an Inter-Agency transfer is processed for an employee, their Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments are not stopped or changed in any way. All other retirement and Savings Plans enrollments are terminated once the Sending Agency processes the “XFO” Benefit Event.

The first portion of this section demonstrates the steps for optionally reviewing the employee’s current enrollments prior to processing the “XFO” Benefit Event. To proceed without reviewing the employee’s current enrollments, skip to **Step 6**.

Step	Action
1.	Navigate to the Benefits Summary page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of the Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Employee/Dependent Information > Benefits Summary Note: WorkCenter sections, folders, and pages may vary based on the user’s Security roles. 

Step	Action
	Users can also access the Benefits Summary page using the following path: NavBar > Menu > Benefits > Review Employee Benefits > Benefits Summary
The Benefits Summary Search page displays. ▼ Search Options Empl ID (begins with) Empl Record = Name (begins with) Last Name (begins with) Business Unit (begins with) Department Set ID =  Department =  Search Clear	
	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.
3.	Enter the employee's Employee ID in the Empl ID field. 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. Empl ID begins with 
4.	Click the Search button. Search Clear

Step	Action
	The Search Results display for the applicable employee. 
5.	Click the Select button at the end of the applicable row. 
	The Benefits Summary page displays for the applicable employee. 
	When the “XFO” Benefit Event is processed, the Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments will not be terminated. They will carry forward with the employee to their new Agency. All other enrollments will be terminated, and the employee will need to re-enroll in these plans at their new Agency.

Step	Action
	The next portion of this section demonstrates the steps used to manually process the “XFO” Benefit Event. The Sending Agency BA should process and finalize the “XFO” Benefit Event right away because this Benefit Event must be Finalized/Enrolled before the receiving Agency BA can process the “XFR” Benefit Event.
6.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > On-Demand Event Process 
	Users can also navigate to the On-Demand Event Process page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Process

The **On-Demand Event Maintenance Find an Existing Value Search** page displays.

On-Demand Event Maintenance
Find an Existing Value
 Search Criteria
 Enter any information you have and click Search. Leave fields blank for a list of all values.

 Recent Searches

Choose from recent searches
 

 Saved Searches

Choose from saved searches
 

Empl ID

begins with

Empl Record

=

Name

begins with

Last Name

begins with

Second Last Name

begins with

Alternate Character Name

begins with

^ Show fewer options
☐ Case Sensitive

Search

Clear

Step	Action
7.	Enter the employee's Employee ID in the Empl ID field. 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. Empl ID begins with Q
8.	Click the Search button. Search Clear

The **On-Demand Event Process** page displays for the applicable employee.

JOHN DOE
Person ID
Ben Record 0

Activity Date 07/01/2026
Source Job Data Change

Pending Activities 1
Action XFO

Event ID 0
Event Date
Status
Class

Event Status

Run Date

Entered 0 of 0

Errors 0
☐ Finalize/Apply Defaults

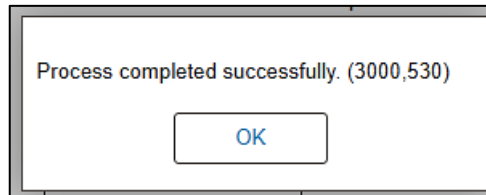
Run Date

Process Indicator N

9.	Review the Activity Date field. For Transfer Events, this date auto-populates based on the effective date of the Transfer transaction processed by HR. Ensure that this date is accurate. Note: The Source field will be "Job Data Change" and the Action field will default to "XFO" (Transfer Out). JOHN DOE Person ID Ben Record 0 Activity Date 07/01/2026 Source Job Data Change Schedule/Prepare Activity Pending Activities 1 Show Activities Action XFO
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Step	Action
10.	Click the Schedule/Prepare Activity button. 

A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



11.	Click the OK button to close the message. 
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The **On-Demand Event Process** page redisplay.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 5

Event Date 07/01/2026

Status Prepared

Class XFO

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

Election Entry

Entered 0 of 0

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

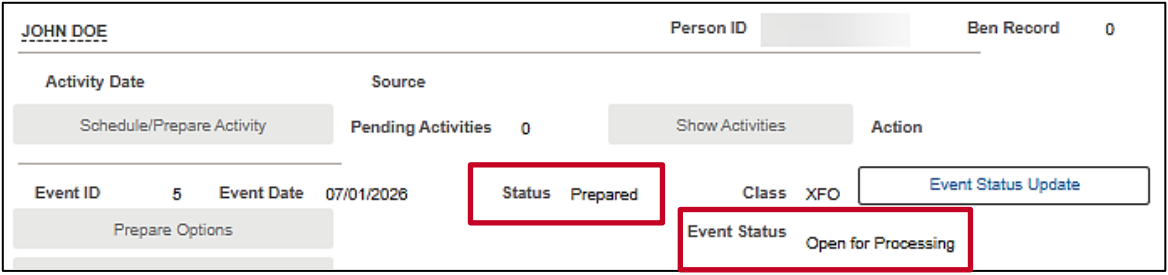
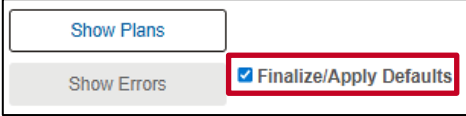
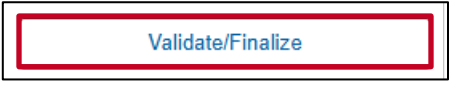
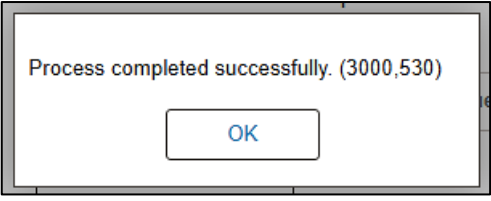
Process Indicator N

Normal Processing

Save

Return to Search

Notify

Step	Action
12.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. 
	If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.
13.	Select the Finalize/Apply Defaults checkbox option. 
14.	Click the Validate/Finalize button. 
A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	
15.	Click the OK button to close the message. 

Step	Action
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The **On-Demand Event Process** page redisplay.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 5

Event Date 07/01/2026

Status Finalized - Enrolled

Class XFO

Event Status Update

Prepare Options

Event Status Closed to Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

Election Entry

Entered 0 of 0

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator N

Normal Processing

Save

Return to Search

Notify



The **Status** field will now display as “Finalized - Enrolled”.

The **Event Status** field will still display as “Closed to Processing”.

JOHN DOE

Person ID

Ben Record 0

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 5

Event Date 07/01/2026

Status Finalized - Enrolled

Class XFO

Event Status Update

Prepare Options

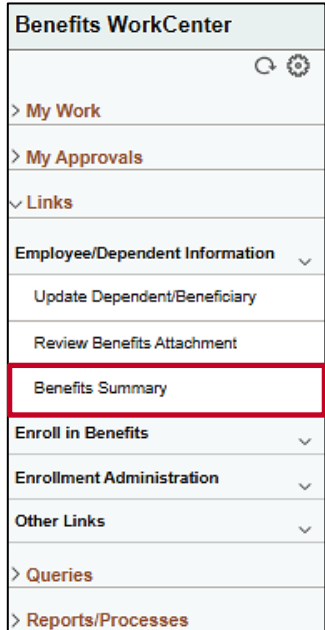
Event Status Closed to Processing

Enrollment Statement

Run Date

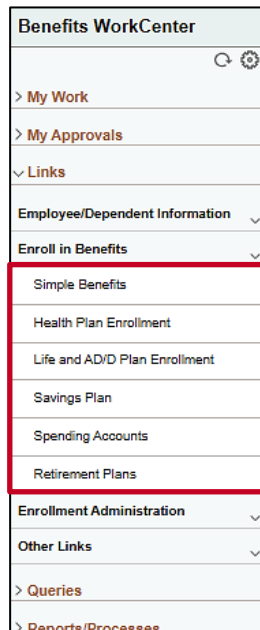


To review the employee's benefits and confirm that they have been terminated, navigate to the employee's **Benefits Summary** page from the **BN WorkCenter**, or review the employee's individual benefit pages (see navigations below).



Benefits WorkCenter

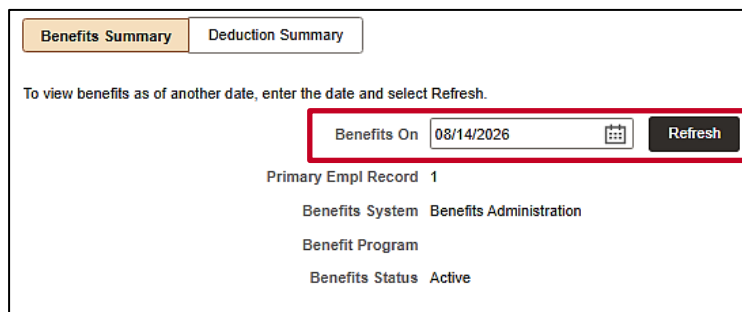
- > My Work
- > My Approvals
- > Links
- Employee/Dependent Information
 - Update Dependent/Beneficiary
 - Review Benefits Attachment
 - Benefits Summary**
- Enroll in Benefits
- Enrollment Administration
- Other Links
- > Queries
- > Reports/Processes



Benefits WorkCenter

- > My Work
- > My Approvals
- > Links
- Employee/Dependent Information
- Enroll in Benefits
 - Simple Benefits
 - Health Plan Enrollment
 - Life and AD/D Plan Enrollment
 - Savings Plan
 - Spending Accounts
 - Retirement Plans
- Enrollment Administration
- Other Links
- > Queries
- > Reports/Processes

Note: If the benefits termination date is in the future, users will need to change the date in the **Benefits On** field on the **Benefits Summary** page and click the **Refresh** button.



Benefits Summary | Deduction Summary

To view benefits as of another date, enter the date and select Refresh.

Benefits On: 08/14/2026 **Refresh**

Primary Empl Record 1

Benefits System: Benefits Administration

Benefit Program

Benefits Status: Active

Users can also access the **Benefits Summary** page using the following navigation path:
NavBar > Menu > Benefits > Review Employee Benefits > Benefits Summary

Individual Benefit Pages

Simple Benefits: **NavBar > Menu > Benefits > Enroll In Benefits > Simple Benefits**

Health Plan Enrollment: **NavBar > Menu > Benefits > Enroll In Benefits > Health Plan Enrollment**

Imputed Life: **NavBar > Menu > Benefits > Enroll In Benefits > Life and AD/D Benefits**

Savings Plan: **NavBar > Menu > Benefits > Enroll In Benefits > Savings Plan**

FSA Benefits: **NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts**

Retirement Plans: **NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans**

Processing a Transfer In Benefit Event – Receiving Agency

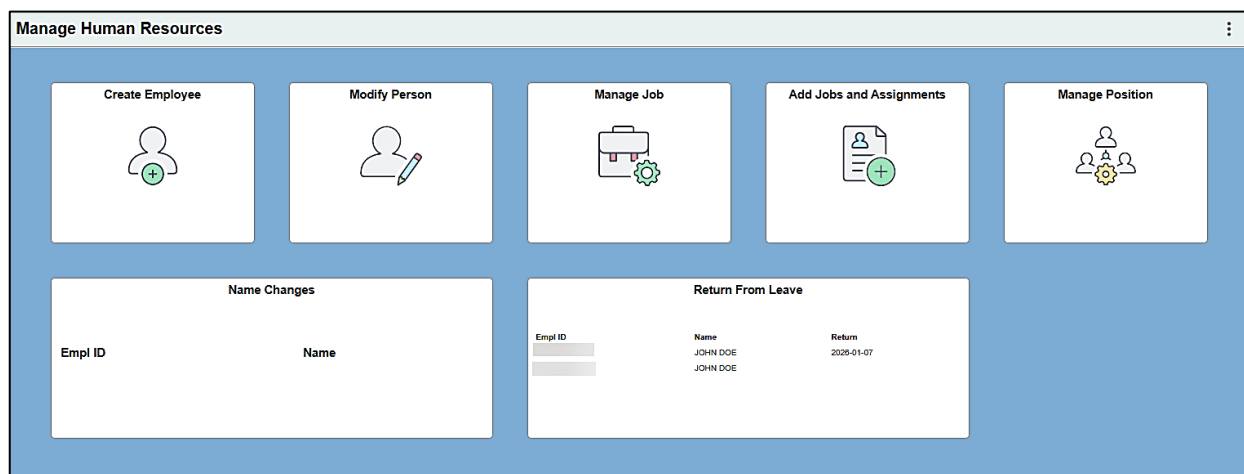
When an Inter-Agency transfer is processed for an employee, their Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments are not stopped or changed in any way. All other retirement enrollments are terminated once the Sending Agency processes the “XFO” Benefit Event.

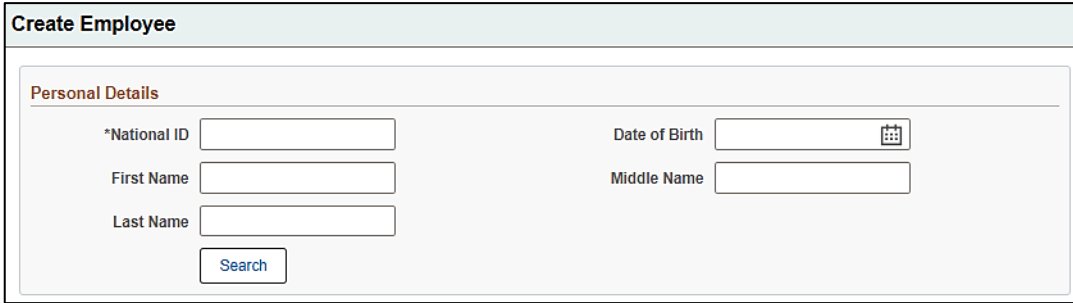
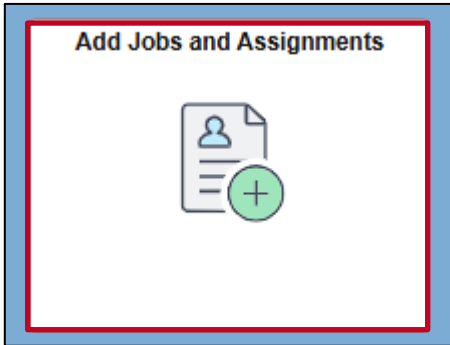
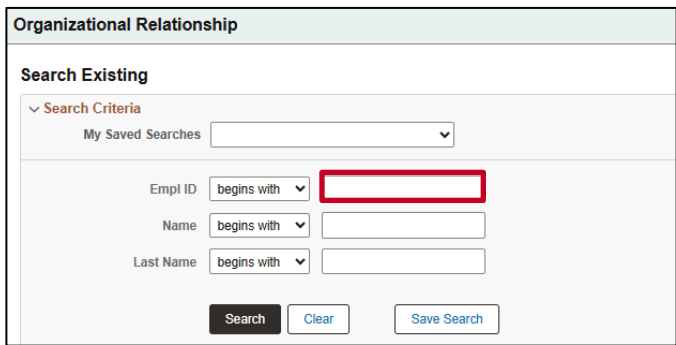
The first portion of this section demonstrates the steps that must be performed by the Receiving Agency in order to confirm that the Sending Agency HR processed the Transfer Out Job Data transaction and verify the transfer date. Additionally, this process is used to confirm that the “XFO” Benefit Event has been processed.

The Receiving Agency HR Administrator cannot process the Transfer In transaction until this is confirmed and the same effective date or the day after must be used for the Transfer In Job Data transaction to avoid a break in service for the employee.

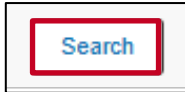
Step	Action
1.	Navigate to the Organizational Relationship page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 

The **Manage Human Resources** page displays.



Step	Action
2.	Click the Create Employee tile. 
The Create Employee Search page displays. 	
	Users can also search from the Add Jobs and Assignments tile, and entering the employee's Employee ID.   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.
3.	Enter the employee's SSN in the National ID field. 

Step	Action
4.	Click the Search button.



The **Create Employee** page redisplay with an Information Message and the **Potential duplicates** section displayed.

Create Employee

Personal Details

*National ID

Date of Birth

First Name

Middle Name

Last Name

Search

Potential duplicates found. Modify the duplicate person or create a new Employee record.

Create Employee

Potential duplicates

Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name	
	05/02/1968	United States	Social Security Number		JOHN	DOE	Organizational Relationship

5.	Click the Organizational Relationship link.
----	--

Create Employee

Potential duplicates

Person ID	Date of Birth	National ID Country	National ID Type	National ID	First Name	Last Name	
	05/02/1968	United States	Social Security Number		JOHN	DOE	Organizational Relationship

The **Organizational Relationship** page displays.

Organizational Relationship

JOHN DOE

Add Employee Relationship

Relationship - Employee

Instance Nbr 0

HR Status Inactive

Payroll Status Terminated

Last Hire Date 10/25/2016

Termination Date 09/30/2026

Assignments

Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	
0	Home	07/01/2026	99900	226061	Inactive	10/25/2016	
Primary Job			Alcoholic Beverage Control	Store 061	Terminated	09/30/2026	Manage Job



All active and inactive assignments for the employee will display on this page.

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Step	Action																					
6.	Review the information and validate that it is consistent with the information obtained from the Sending Agency. If the information is not consistent, contact the Sending Agency and/or employee. At a minimum, the following information should be reviewed: a. Name and Employee ID fields: The Name and Employee ID are displayed at the top of the page. Confirm this is the correct information. b. HR Status field: Should be “Inactive”. If it is “Active”, contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction. c. Payroll Status field: Should be “Terminated”. If the status is not “Terminated”, contact the Sending Agency and/or employee to coordinate the timing (date) for the termination and new hire/rehire transaction. d. Effective Date field: Should match the agreed upon effective date.																					
	Organizational Relationship JOHN DOE Add Employee Relationship Relationship - Employee Instance Nbr 0 HR Status Inactive Payroll Status Terminated Last Hire Date 10/25/2016 Termination Date 06/30/2026 Assignments <table><tr><th>Employment Record / Job Indicator</th><th>Home/Host</th><th>Effective Date</th><th>Business Unit</th><th>Department</th><th>HR Status / Payroll Status</th><th>Start Date / Termination Date</th></tr><tr><td>0</td><td>Home</td><td>07/01/2026</td><td>99900</td><td>226061</td><td>Inactive</td><td>10/25/2016</td></tr><tr><td>Primary Job</td><td></td><td></td><td>Alcoholic Beverage Control</td><td>Store 061</td><td>Terminated</td><td>06/30/2026</td></tr></table> Manage Job	Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date	0	Home	07/01/2026	99900	226061	Inactive	10/25/2016	Primary Job			Alcoholic Beverage Control	Store 061	Terminated	06/30/2026
Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date																
0	Home	07/01/2026	99900	226061	Inactive	10/25/2016																
Primary Job			Alcoholic Beverage Control	Store 061	Terminated	06/30/2026																
	At this point, the Receiving Agency HR must complete the Hire/Transfer In Job Data transaction using the same effective date that the Sending Agency used for the Termination: Transfer Out Job Data transaction. After this transaction is completed by HR, review the employee’s enrollments to verify the following: - Health, Premium Reward, FSA Plans, FSA Fee, and Imputed Life <u>have not</u> been terminated by the Sending Agency - Retirement and Savings Accounts all show as “Terminated” as of the 1st of the month following the transfer																					



To review the employee's benefits and confirm that they have been terminated, navigate to the employee's **Benefits Summary** page from the **BN WorkCenter**, or review the employee's individual benefit pages (see navigations below).

Benefits WorkCenter	Benefits WorkCenter
> My Work	> My Work
> My Approvals	> My Approvals
> Links	> Links
Employee/Dependent Information	Employee/Dependent Information
Update Dependent/Beneficiary	Enroll in Benefits
Review Benefits Attachment	Simple Benefits
Benefits Summary	Health Plan Enrollment
Enroll in Benefits	Life and AD/D Plan Enrollment
Enrollment Administration	Savings Plan
Other Links	Spending Accounts
> Queries	Retirement Plans
> Reports/Processes	Enrollment Administration
	Other Links
	> Queries
	> Reports/Processes

Note: If the benefits termination date is in the future, users will need to change the date in the **Benefits On** field on the **Benefits Summary** page and click the **Refresh** button.

Benefits Summary	Deduction Summary
To view benefits as of another date, enter the date and select Refresh.	
Benefits On 08/14/2026 Refresh	
Primary Empl Record 1	
Benefits System Benefits Administration	
Benefit Program	
Benefits Status Active	

Users can also access the **Benefits Summary** page using the following navigation path:
NavBar > Menu > Benefits > Review Employee Benefits > Benefits Summary

Individual Benefit Pages

Simple Benefits: **NavBar > Menu > Benefits > Enroll In Benefits > Simple Benefits**

Health Plan Enrollment: **NavBar > Menu > Benefits > Enroll In Benefits > Health Plan Enrollment**

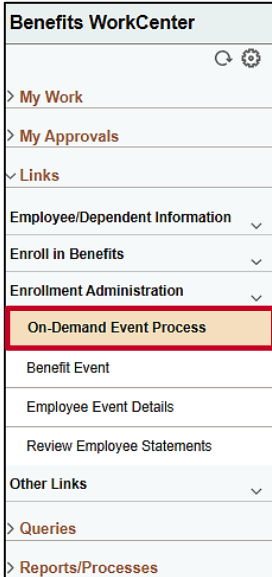
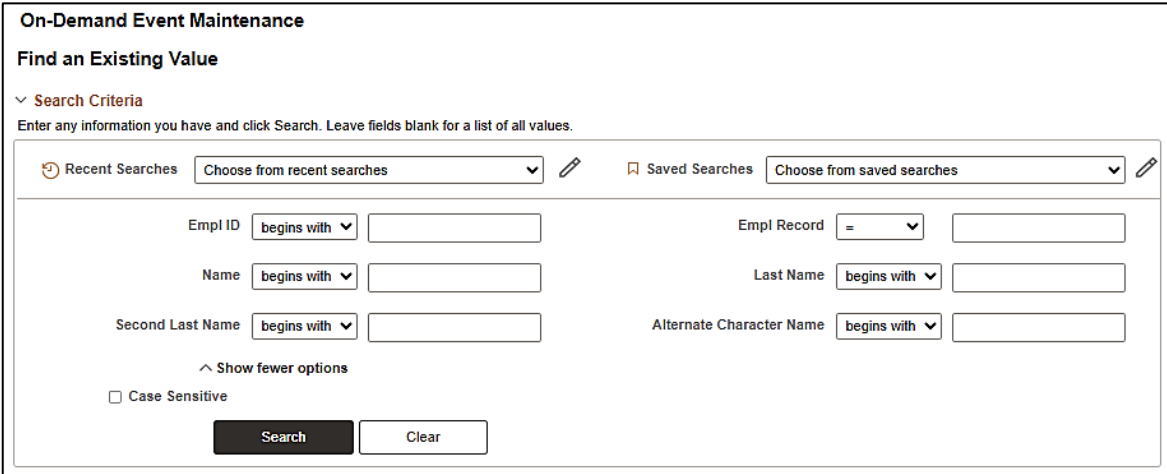
Imputed Life: **NavBar > Menu > Benefits > Enroll In Benefits > Life and AD/D Benefits**

Savings Plan: **NavBar > Menu > Benefits > Enroll In Benefits > Savings Plan**

FSA Benefits: **NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts**

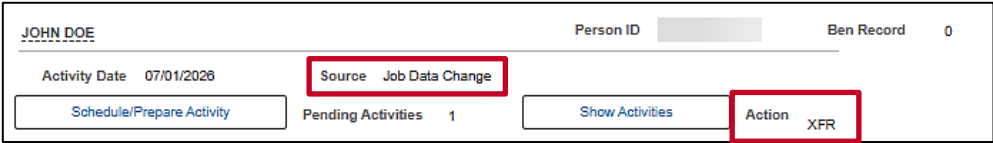
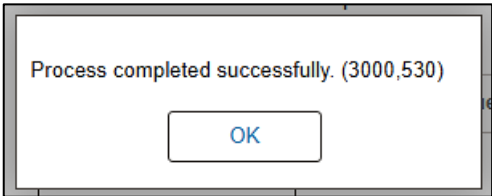
Retirement Plans: **NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans**

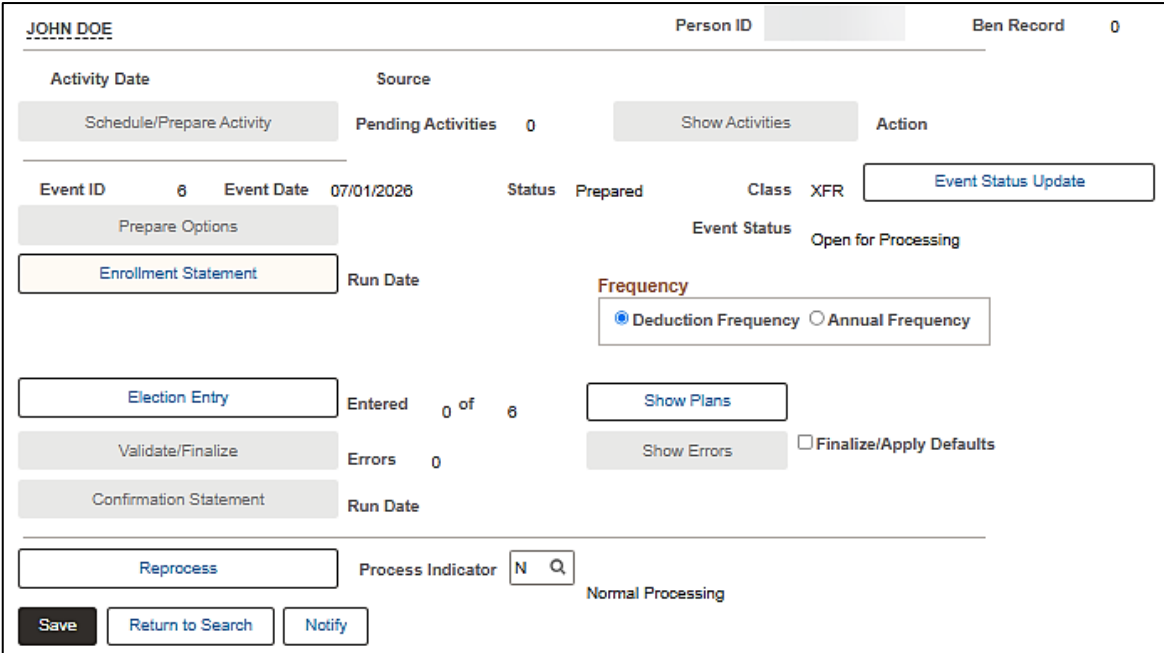
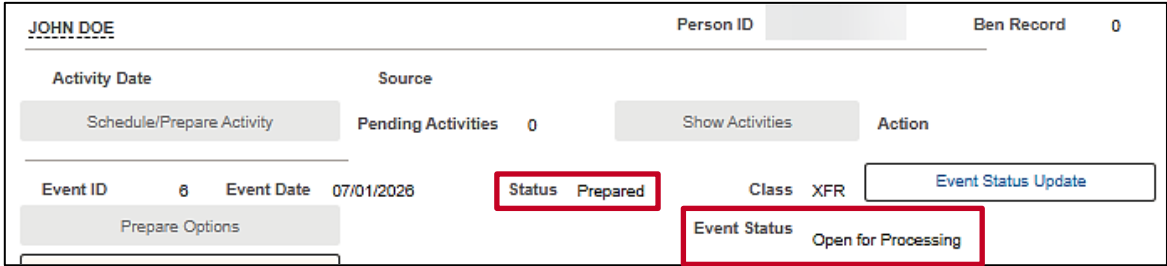
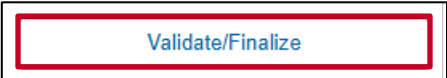
Step	Action
7.	Review the employee's benefit enrollments (navigations above) to ensure that only the retirement and Savings Plans enrollments have a coverage election of "Terminate". Keep the following in mind: - During review of the employee's health plan enrollment, take note if the employee is enrolled in a regional HMO plan (Kaiser or Optima). Employees are eligible to enroll in a regional HMO plan based on a live or work policy meaning that the employee must either live or work in that coverage region in order to enroll in the regional HMO plan. If the employee is enrolled in a regional HMO plan and as part of this Agency transfer, the employee will no longer live or work in that coverage region, the "XFR" Benefit Event (covered subsequently in this Job Aid) must be used to enroll the employee in the new health plan that they elect. - If all the employee's benefit enrollments have been terminated, this indicates that the Sending Agency HR Administrator used the incorrect Action/Reason codes when entering the Termination/Transfer Out Job Data transaction. In these cases, submit a VCCC Ticket to the Cardinal Post Production Support (PPS) Team with "Cardinal Benefits" in the Subject line as the Cardinal PPS Team will need to resolve this issue. - If none of the employee's benefit enrollments have been terminated, this indicates that either the Sending Agency HR has not completed the Termination/Transfer Out Job Data transaction or it was completed after the Receiving Agency's HR completed the Hire/Transfer In Job Data transaction. In these cases, submit a VCCC Ticket to the Cardinal Post Production Support (PPS) Team with "Cardinal Benefits" in the Subject line as the Cardinal PPS Team will need to resolve this issue.
	When the Receiving Agency HR completes the Hire/Transfer In Job Data transaction, an "XFR" (Transfer In) Benefit Event is automatically created. The next portion of this section demonstrates the steps used to manually process the "XFR" Benefit Event. The receiving Agency BA should process and finalize the "XFR" Benefit Event immediately unless the employee is making a health plan enrollment change based on moving in or out of a regional HMO plan coverage region. If the employee is making a health plan change for this reason, the "XFR" Benefit Event must be completed within 29 days (the "XFR" Benefit Event will systematically close after 29 days). The proceeding steps of this section are used to manually finalize the "XFR" Benefit Event.

Step	Action
8.	The “XFR” Benefit Event must be processed. Use the following navigation path in the WorkCenter: Links > Enrollment Administration > On-Demand Event Process 
	Users can also navigate to the On-Demand Event Process page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Process
The On-Demand Event Maintenance 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.



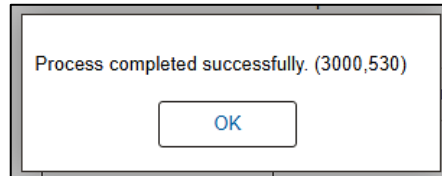
Step	Action
9.	Enter the retiring employee’s Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. Empl ID begins with ▾
10.	Click the Search button. Search Clear
The On-Demand Event Process page displays for the applicable employee. JOHN DOE Person ID Ben Record 0 Activity Date 07/01/2026 Source Job Data Change Schedule/Prepare Activity Pending Activities 1 Show Activities Action XFO Event ID 0 Event Date Status Class Event Status Update Prepare Options Enrollment Statement Run Date Frequency ☒ Deduction Frequency ☐ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Previous in List Next in List Notify	
11.	Review the Activity Date field. For Transfer Events, this date auto-populates based on the effective date of the Hire/Transfer In transaction processed by HR. Ensure that this date is accurate. JOHN DOE Person ID Ben Record 0 Activity Date 07/01/2026 Source Job Data Change Schedule/Prepare Activity Pending Activities 1 Show Activities Action XFR

Step	Action
	The Source field will be “Job Data Change”. The Action field will default to “XFR” (Transfer In). 
12.	Click the Schedule/Prepare Activity button. 
13.	If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a “0”. In this case, proceed to Step 14. If the Pending Activities field displays a “1”, click the Schedule/Prepare Activity button. Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. 
A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	
14.	Click the OK button to close the message. 

Step	Action
	The On-Demand Event Maintenance page redisplay. 
15.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. 
	If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.
16.	Select the Finalize/Apply Defaults checkbox option. 
17.	Click the Validate/Finalize button. 

Step	Action
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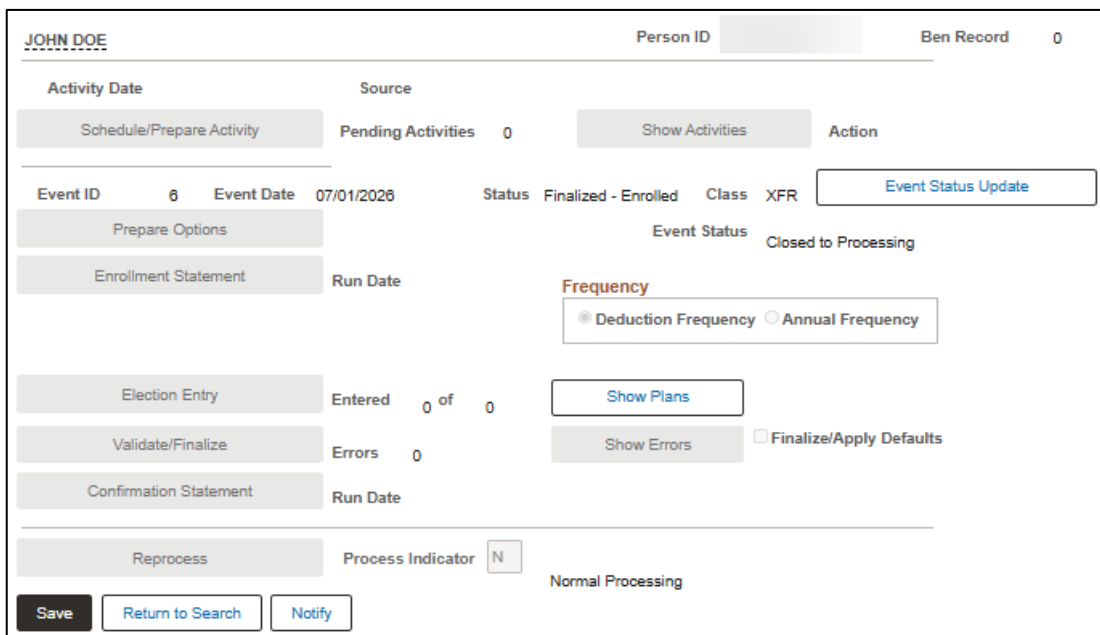
A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



18. Click the **OK** button to close the message.

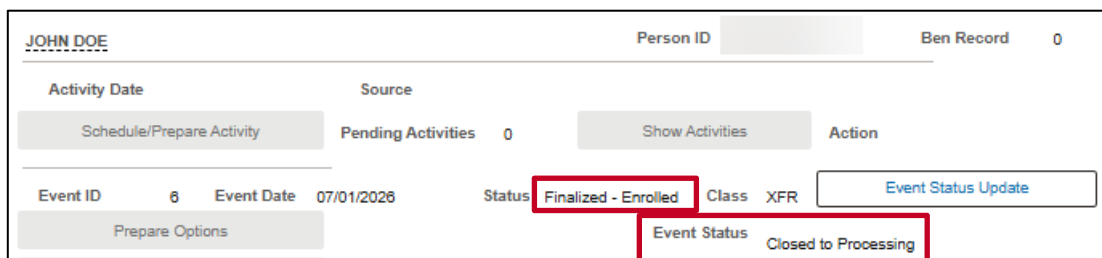


The **On-Demand Event Process** page redisplay.




The **Status** field will now display as “Finalized - Enrolled”.

The **Event Status** field will still display as “Closed to Processing”.





At this point, users can optionally review the employee's benefits and confirm that they have been terminated, navigate to the employee's **Benefits Summary** page from the **BN WorkCenter**, or review the employee's individual benefit pages (see navigations below).

Benefits WorkCenter	Benefits WorkCenter
> My Work	> My Work
> My Approvals	> My Approvals
√ Links	√ Links
Employee/Dependent Information	Employee/Dependent Information
Update Dependent/Beneficiary	Enroll in Benefits
Review Benefits Attachment	Simple Benefits
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Enrollment Administration	Savings Plan
Other Links	Spending Accounts
> Queries	Retirement Plans
> Reports/Processes	Enrollment Administration
	Other Links
	> Queries
	> Reports/Processes

Note: If the benefits termination date is in the future, users will need to change the date in the **Benefits On** field on the **Benefits Summary** page and click the **Refresh** button.

Benefits Summary	Deduction Summary
To view benefits as of another date, enter the date and select Refresh.	
Benefits On 08/14/2026 Refresh	
Primary Empl Record 1	
Benefits System Benefits Administration	
Benefit Program	
Benefits Status Active	

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Savings Plan: **NavBar > Menu > Benefits > Enroll In Benefits > Savings Plan**

FSA Benefits: **NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts**

Retirement Plans: **NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans**

BN361 Managing Terminations and Transfers

Step	Action
	Assist the employee as needed to ensure that any retirement or Savings Plans enrollments are reestablished based on the following guidelines: • Ensure that the employee's VNAV Record is established in a timely manner by monitoring the VNAV Cancel Records Report daily and having HR manually load the job information into VNAV if necessary • Inform the employee they will need to reenroll in the Annuity/Deferred Compensation plans (it is the employee's responsibility to do so)