



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 Human Resources (HR) staff for a separation. The type of separation determines the required documentation that should be submitted to 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 staff and the 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: Employees terminated within Cardinal HCM 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 Policy 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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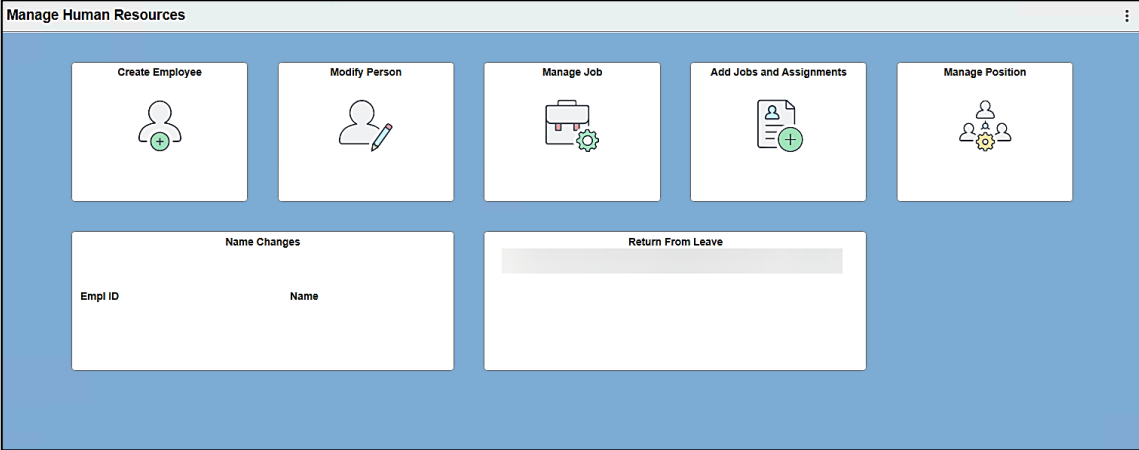
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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
4/13/2026	Added reference information to the Processing Paid Leaves of Absence in Cardinal and Processing Unpaid Leaves of Absence in Cardinal Cross Functional Job Aids.
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. Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Termination - Voluntary

Step	Action
1.	Navigate to the Manage Job page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
2.	Click the Manage Job tile. 



Step	Action
	The Manage Job Search Existing page displays. Manage Job Search Existing Search Criteria My Saved Searches Empl ID begins with Empl Record = Name begins with Last Name begins with HR Status begins with Business Unit begins with Department begins with Business Title begins with ☐ Include History Search Clear Save Search
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages 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 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.	Select the Include History checkbox option. ☒ Include History Search Clear Save Search
5.	Click the Search button. Search Clear

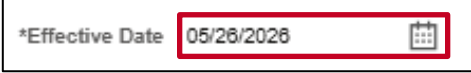
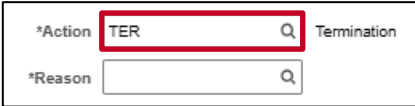
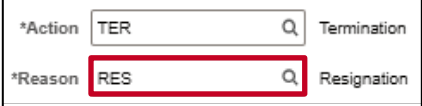
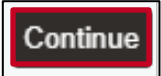


Human Resources Job Aid

HR351 Separation Action Statuses

Step	Action																																																																																																																																					
	The Job Actions Summary page displays for the selected employee. Job Actions Summary Active Create Job Action Update/Display Include History <table><thead><tr><th>Effective Date / Sequence</th><th>HR / Payroll Status / Job Indicator</th><th>Action / Reason</th><th>Last Updated By / Date</th><th>Status</th><th>Job Code</th><th>Position</th><th>Reports To</th><th>Regulatory Region</th><th>Business Unit</th><th>Department</th><th>Location</th><th>Establishment ID</th><th>Company</th><th>Pay Group</th><th>Pay Group</th><th>Tax Location Code</th><th>Employee Classification</th><th>Employee Type</th></tr></thead><tbody><tr><td>09/10/2025 0</td><td>Active Primary Job</td><td>Pay Rate Change FY26 Statewide Increase</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFR107)</td><td>SM1 Semimonthly Classified</td><td>760 Richmond (City)</td><td>CLS Classified Salary</td><td>S Salaried</td></tr><tr><td>02/10/2025 0</td><td>Active Primary Job</td><td>Pay Rate Change Internal Alignment</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFR107)</td><td>SM1 Semimonthly Classified</td><td>760 Richmond (City)</td><td>CLS Classified Salary</td><td>S Salaried</td></tr><tr><td>10/01/2024 0</td><td>Active Primary Job</td><td>Position Change Reports to/Supv Change</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFR107)</td><td>SM1 Semimonthly Classified</td><td>760 Richmond (City)</td><td>CLS Classified Salary</td><td>S Salaried</td></tr><tr><td>09/10/2024 0</td><td>Active Primary Job</td><td>Pay Rate Change FY26 Statewide Increase</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States FF</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFR107)</td><td>SM1 Semimonthly Classified</td><td>760 Richmond (City)</td><td>CLS Classified Salary</td><td>S Salaried</td></tr><tr><td>12/10/2023 0</td><td>Active Primary Job</td><td>Pay Rate Change FY24 Dec Statewide Increase</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States FF</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFR107)</td><td>SM1 Semimonthly Classified</td><td>760 Richmond (City)</td><td>CLS Classified Salary</td><td>S Salaried</td></tr><tr><td>09/25/2023 0</td><td>Active Primary Job</td><td>Position Change Reports to/Supv Change</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States FF</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFR107)</td><td>SM1 Semimonthly Classified</td><td>760 Richmond (City)</td><td>CLS Classified Salary</td><td>S Salaried</td></tr></tbody></table>	Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group	Pay Group	Tax Location Code	Employee Classification	Employee Type	09/10/2025 0	Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States						SM1 Semimonthly Class (SATFR107)	SM1 Semimonthly Classified	760 Richmond (City)	CLS Classified Salary	S Salaried	02/10/2025 0	Active Primary Job	Pay Rate Change Internal Alignment		Completed				USA United States						SM1 Semimonthly Class (SATFR107)	SM1 Semimonthly Classified	760 Richmond (City)	CLS Classified Salary	S Salaried	10/01/2024 0	Active Primary Job	Position Change Reports to/Supv Change		Completed				USA United States						SM1 Semimonthly Class (SATFR107)	SM1 Semimonthly Classified	760 Richmond (City)	CLS Classified Salary	S Salaried	09/10/2024 0	Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States FF						SM1 Semimonthly Class (SATFR107)	SM1 Semimonthly Classified	760 Richmond (City)	CLS Classified Salary	S Salaried	12/10/2023 0	Active Primary Job	Pay Rate Change FY24 Dec Statewide Increase		Completed				USA United States FF						SM1 Semimonthly Class (SATFR107)	SM1 Semimonthly Classified	760 Richmond (City)	CLS Classified Salary	S Salaried	09/25/2023 0	Active Primary Job	Position Change Reports to/Supv Change		Completed				USA United States FF						SM1 Semimonthly Class (SATFR107)	SM1 Semimonthly Classified	760 Richmond (City)	CLS Classified Salary	S Salaried
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	If the Include History checkbox option was not selected, only the current row of data will display.																																																																																																																																					
6.	Click the Create Job Action button to add a new effective dated row. Create Job Action																																																																																																																																					
	The Create Job Action page displays in a pop-up window. Cancel Create Job Action Continue Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page. *Effective Date 05/26/2026 Effective Sequence 0 *Action *Reason																																																																																																																																					

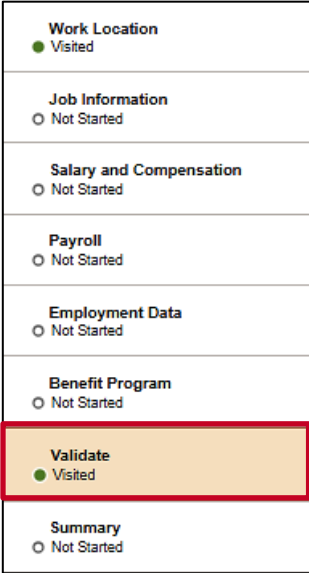
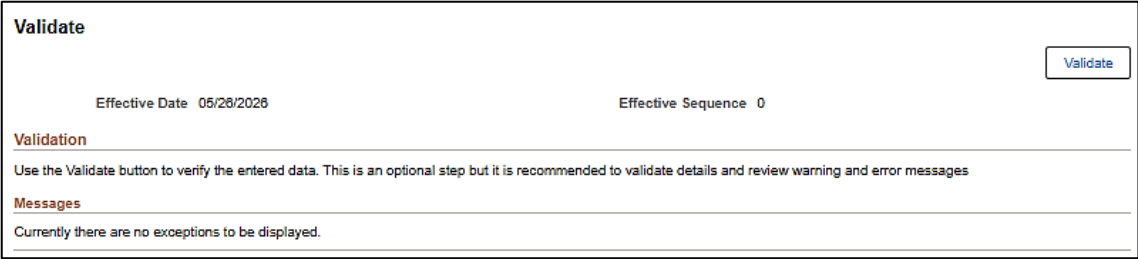
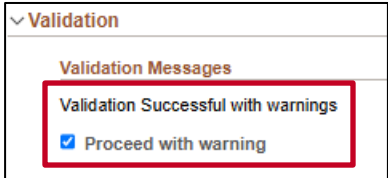


Step	Action
7.	Update the effective date as needed using the Effective Date Calendar icon. 
	Set the effective date to be one day after the employee's last day worked. The effective date of Termination transactions is generally the day immediately following the last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "5/25/2026", the effective date of the termination should be "5/26/2026". 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.
8.	Click the Action field dropdown button and select "TER" (Termination). 
9.	Click the Reason field dropdown button and select the applicable reason ("RES" has been selected for this example). 
	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 Benefits Administrator should review the employee's current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination. For further information on Action Reasons, see the Job Aid titled HR351 Action Reason Codes. This Job Aid can be found on the Cardinal website in Job Aids under Learning.
10.	Click the Continue button. 



Step	Action
	The Work Location page displays. Note: After selecting the Action and Action Reason, the HR Status and Payroll Status fields automatically update. Termination - Resignation Active Next > Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program Validate Summary Work Location Effective Date 05/26/2026 HR Status Inactive *Job Indicator Primary Job Effective Sequence 0 Payroll Status Terminated Position Number Position Entry Date 06/25/2003 Regulatory Region USA Business Unit Department Location RICH Date Created 05/26/2026 Override Details Position Managed Record No Company DLI Dept of Labor and Industry Department Entry Date 03/11/1991 Establishment ID Last Start Date 03/11/1991 Termination Date 05/25/2026 Override Last Date Worked Last Date Worked 05/25/2026 STD Claim Number Layoff Notice Date Recall Eligibility Flag Turn Off Auto Pay Leave With Pay Working Yes No Yes No
11.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Terminated”. Work Location Effective Date 05/26/2026 HR Status Inactive *Job Indicator Primary Job Effective Sequence 0 Payroll Status Terminated

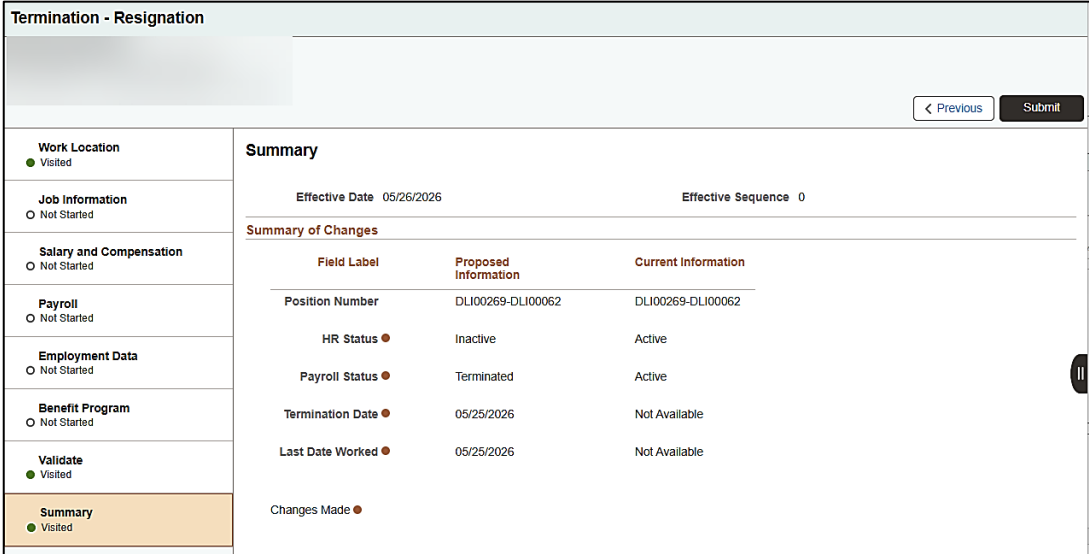
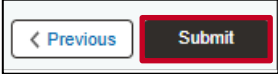
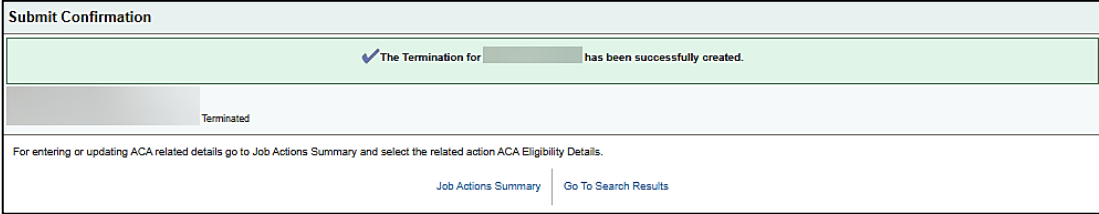


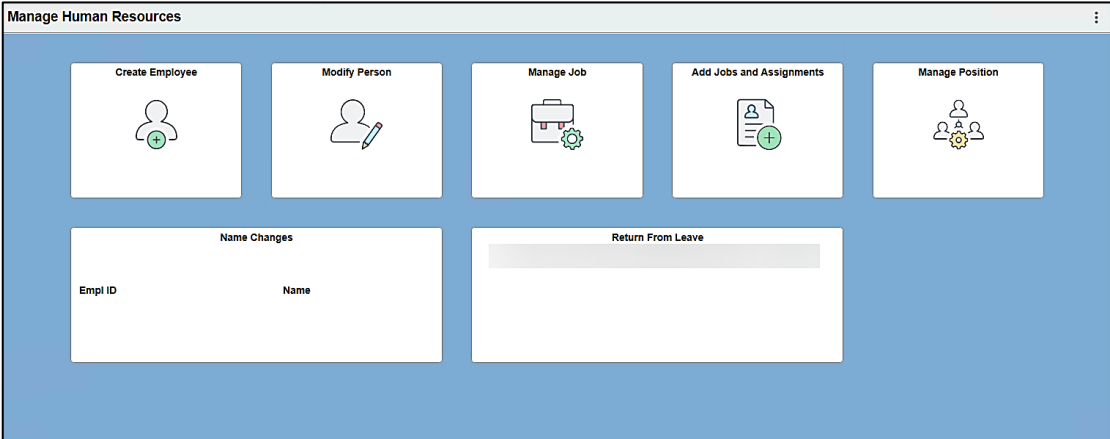
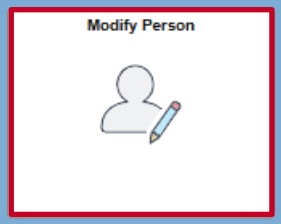
Step	Action
12.	Click the Validate tab. 
The Validate page displays. 	
13.	Review the Validate page and click the Validate button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable. 



Step	Action
	The Validate page refreshes. Validate Effective Date 05/26/2026Effective Sequence 0 Validate Validation Use the Validate button to verify the entered data. This is an optional step but it is recommended to validate details and review warning and error messages Messages Validation Successful



Step	Action
	The Summary page displays. 
15.	Review the Summary of Changes section and click the Submit button. 
	The Submit Confirmation page displays confirming the change. 
	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.
16.	Click the Home button to navigate back to the Cardinal HCM Homepage. 

Step	Action
17.	Navigate to the Modify Person page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
18.	Click the Modify Person tile. 



Step	Action
	The Modify Person Search Existing page displays. Modify Person Search Existing ▼ Search Criteria My Saved Searches Empl ID begins with Name begins with Last Name begins with ☐ Include History Search Clear Save Search
19.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various 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 ▼
20.	Select the Include History checkbox option. ☒ Include History Search Clear Save Search
21.	Click the Search button. Search Clear



Step

Action

The **Modify Person** page displays (**Step 1 of 2: Person Data**) with the **Person Details** section displayed by default.

Modify Person

1

Person Data

2

Summary

Next >

Person Details

Contact Information

Regional

VA Person Info

Validation

Step 1 of 2: Person Data

Person Details

Names

Format Type	Effective Date	Display Name	Formal Name
English CURRENT	09/23/2022		
English HISTORY	03/11/1991		

Personal Information

*Date of Birth

Birth Country
USA
United States

Birth Location

Date of Death

Birth State

Exclude Contact Information?

Biographical Details

Effective Date	Gender	Highest Education Level	Marital Status
09/23/2022 CURRENT	Male	Masters Level Degree	Unknown
03/11/1991 HISTORY	Male	I-Master's Level Degree	Unknown

National ID

22.

Click the **Contact Information** tab.

Person Details

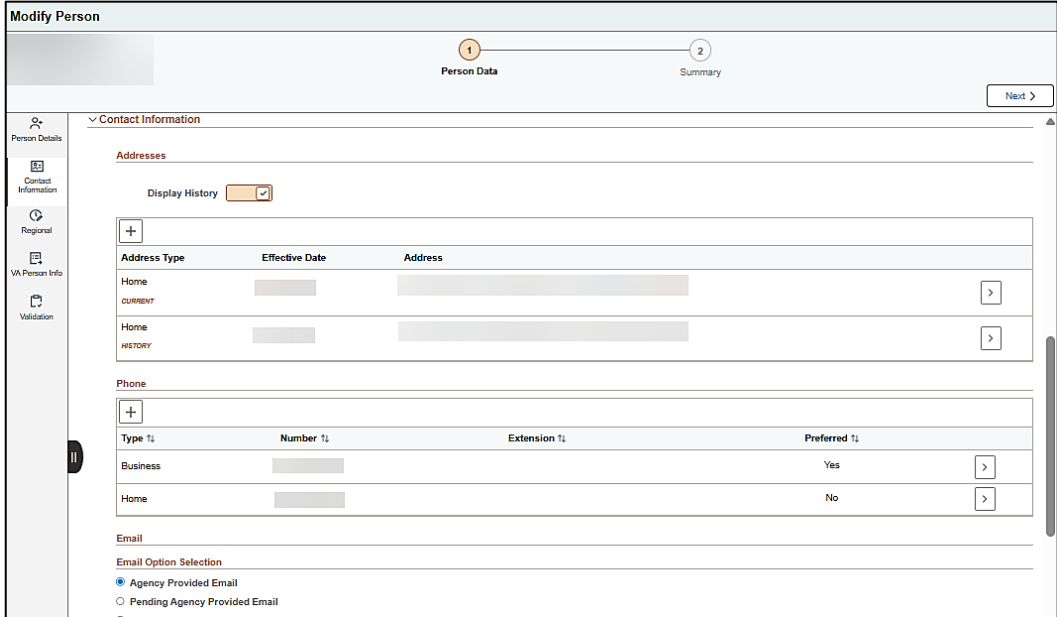
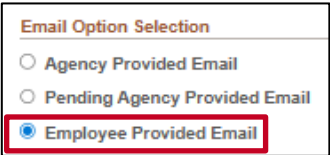
Contact Information

Regional

VA Person Info

Validation



Step	Action
	The Contact Information section displays. 
23.	Select the Employee Provided Email radio button option in the Email Option Selection section. 
24.	Click the Add Email button (+) to add a personal email address. Note: If a personal email exists, confirm the personal email address and proceed to Step 28. 

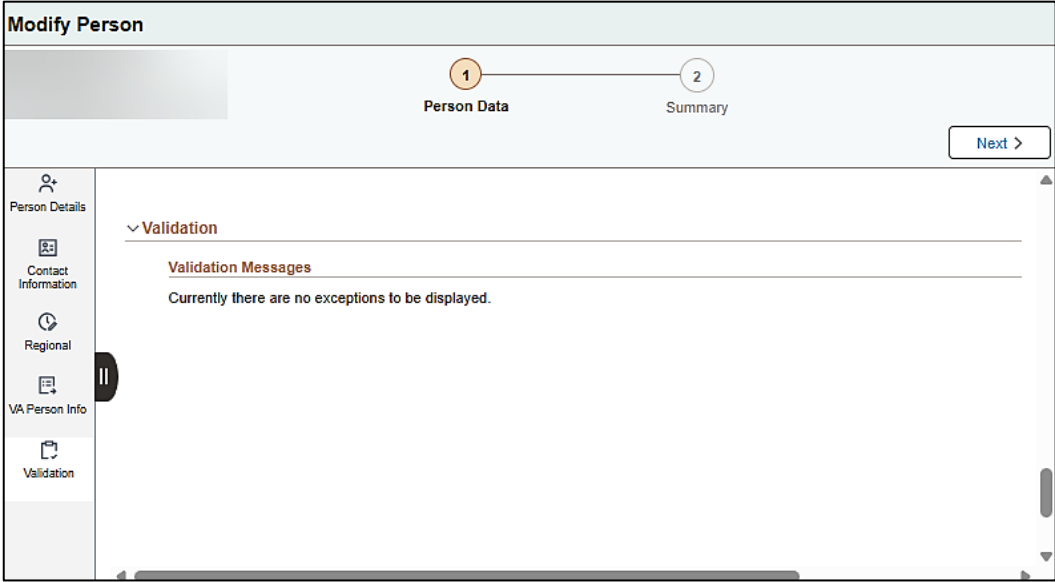
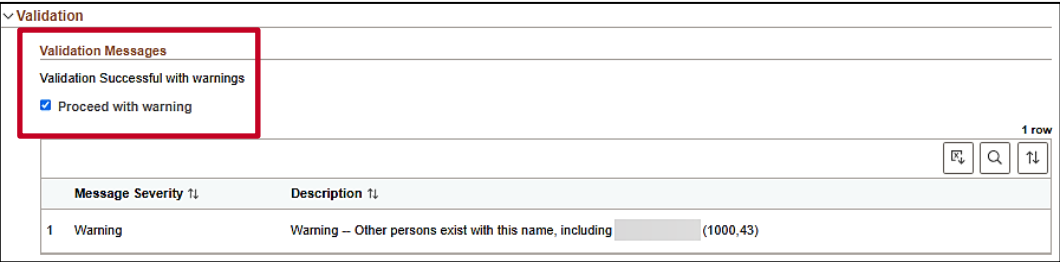


Step	Action												
	The Email Address page displays in a pop-up window. Cancel Email Address Done *Email Type Preferred No *Email Address												
25.	Click the Email Type dropdown button and select "Personal". *Email Type Personal												
26.	Enter the employee's personal email address in the Email Address field. *Email Address												
27.	Click the Done button. Done												
	The Email Option Selection section refreshes. Email 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 + <table><thead><tr><th>Type ↑↓</th><th>Email Address ↑↓</th><th>Preferred ↑↓</th><th></th></tr></thead><tbody><tr><td>Business</td><td>@doli.virginia.gov</td><td>Yes</td><td>></td></tr><tr><td>Personal</td><td>Fred.Flintstone@gmail.com</td><td>No</td><td>></td></tr></tbody></table>	Type ↑↓	Email Address ↑↓	Preferred ↑↓		Business	@doli.virginia.gov	Yes	>	Personal	Fred.Flintstone@gmail.com	No	>
Type ↑↓	Email Address ↑↓	Preferred ↑↓											
Business	@doli.virginia.gov	Yes	>										
Personal	Fred.Flintstone@gmail.com	No	>										

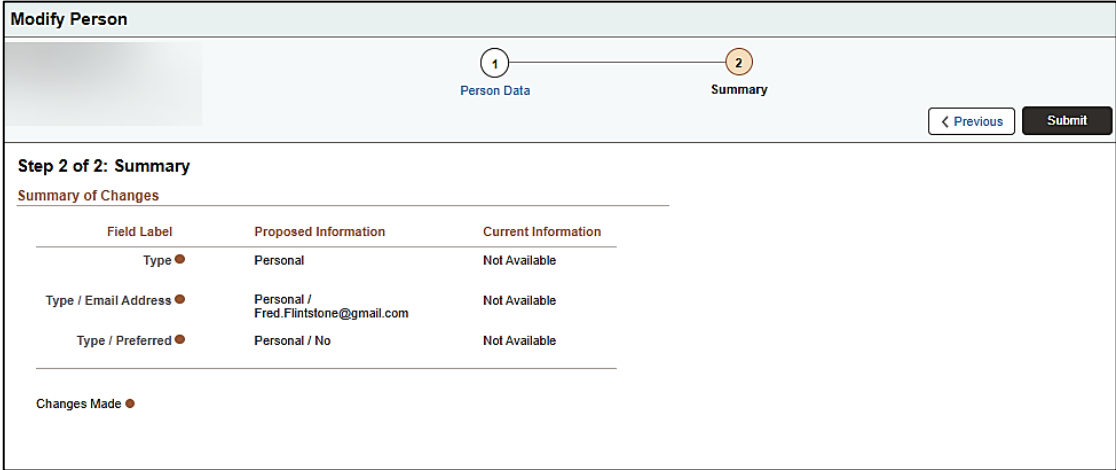
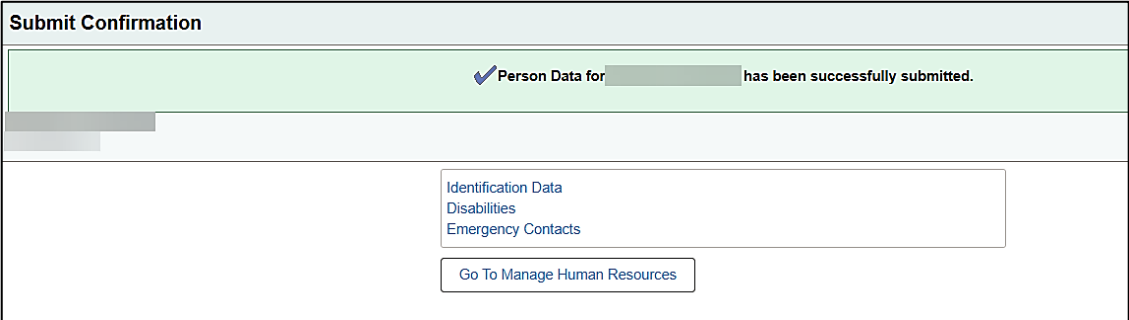


Step	Action						
	When the Employee Provided Email radio button option is selected, the Personal email address will update to “Yes” in the Preferred column after validation and submission, and the Business email address is removed. Email Option Selection ☐ Agency Provided Email ☐ Pending Agency Provided 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 + <table><tr><th>Type ↑↓</th><th>Email Address ↑↓</th><th>Preferred ↑↓</th></tr><tr><td>Personal</td><td>Fred.Flintstone@gmail.com</td><td>Yes</td></tr></table> >	Type ↑↓	Email Address ↑↓	Preferred ↑↓	Personal	Fred.Flintstone@gmail.com	Yes
Type ↑↓	Email Address ↑↓	Preferred ↑↓					
Personal	Fred.Flintstone@gmail.com	Yes					
28.	Click the Validation tab.  Person Details  Contact Information  Regional  VA Person Info  Validation						

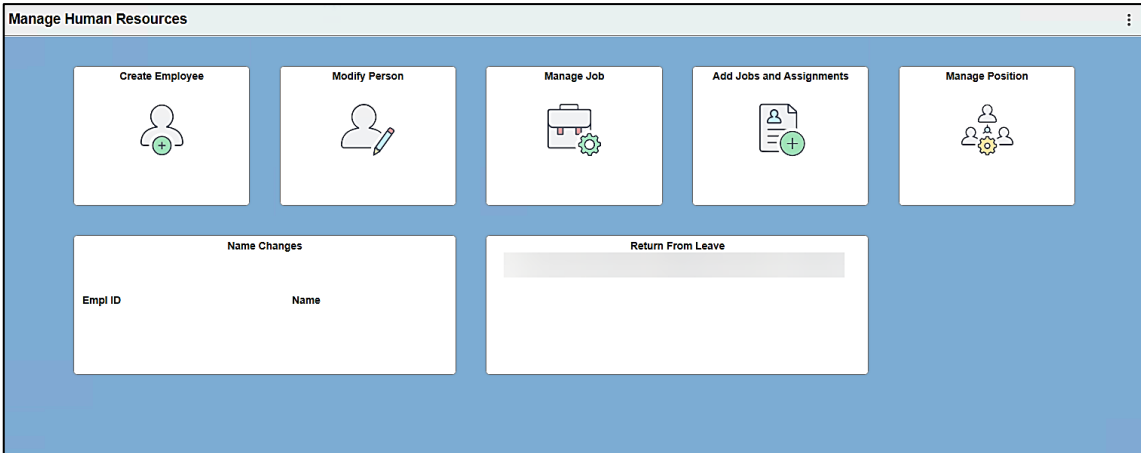


Step	Action
	The Validation page displays. 
29.	Review the Validation page and click the Next button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable. 



Step	Action
	The Step 2 of 2: Summary page displays. 
30.	Review the Summary of Changes section and click the Submit button. 
	The Submit Confirmation page displays. 
31.	Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report
32.	Print the report and place the printed transaction in the employee file for future audit requests. 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.

Termination – Involuntary (except Layoff)

Step	Action
1.	Navigate to the Manage Job page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
2.	Click the Manage Job tile. 



Step	Action
	The Manage Job Search Existing page displays. Manage Job Search Existing Search Criteria My Saved Searches Empl ID begins with Empl Record = Name begins with Last Name begins with HR Status begins with Business Unit begins with Department begins with Business Title begins with ☐ Include History Search Clear Save Search
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3.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various 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.	Select the Include History checkbox option. ☒ Include History Search Clear Save Search
5.	Click the Search button. Search Clear

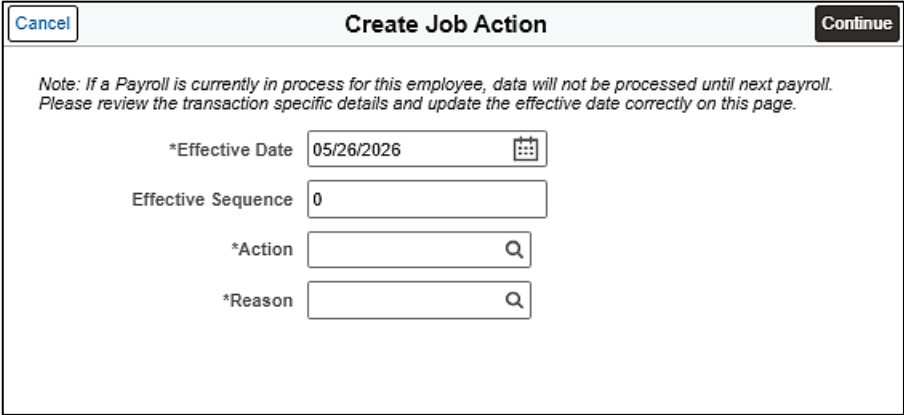
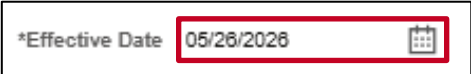
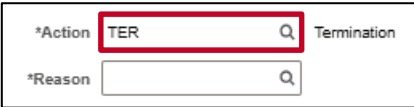


Human Resources Job Aid

HR351 Separation Statuses

Step	Action																																																																																																									
	The Job Actions Summary page displays for the selected employee. Job Actions Summary Active Create Job Action Update/Display Include History Job Actions Summary <table><tr><th>Effective Date / Sequence</th><th>HR / Payroll Status / Job Indicator</th><th>Action / Reason</th><th>Last Updated By / Date</th><th>Status</th><th>Job Code</th><th>Position</th><th>Reports To</th><th>Regulatory Region</th><th>Business Unit</th><th>Department</th><th>Location</th><th>Establishment ID</th><th>Company</th><th>Pay Group</th></tr><tr><td>11/08/2025 0</td><td>Active Primary Job</td><td>Position Change Reports To/Supv Change</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFRJ0)</td></tr><tr><td>10/25/2025 0</td><td>Active Primary Job</td><td>Position Change Reports To/Supv Change</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFRJ0)</td></tr><tr><td>06/10/2025 0</td><td>Active Primary Job</td><td>Pay Rate Change FY26 Statewide Increase</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFRJ0)</td></tr><tr><td>03/12/2025 0</td><td>Active Primary Job</td><td>Data Change Data Change</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFRJ0)</td></tr><tr><td>09/17/2024 0</td><td>Active Primary Job</td><td>Position Change Position Data Update</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td></td><td></td><td></td><td></td><td></td><td>SM1 Semimonthly Class (SATFRJ0)</td></tr><tr><td>06/10/2024</td><td>Active</td><td>Pay Rate Change</td><td></td><td></td><td></td><td></td><td></td><td>USA</td><td></td><td></td><td></td><td></td><td></td><td>SM1</td></tr></table>	Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group	11/08/2025 0	Active Primary Job	Position Change Reports To/Supv Change		Completed				USA United States						SM1 Semimonthly Class (SATFRJ0)	10/25/2025 0	Active Primary Job	Position Change Reports To/Supv Change		Completed				USA United States						SM1 Semimonthly Class (SATFRJ0)	06/10/2025 0	Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States						SM1 Semimonthly Class (SATFRJ0)	03/12/2025 0	Active Primary Job	Data Change Data Change		Completed				USA United States						SM1 Semimonthly Class (SATFRJ0)	09/17/2024 0	Active Primary Job	Position Change Position Data Update		Completed				USA United States						SM1 Semimonthly Class (SATFRJ0)	06/10/2024	Active	Pay Rate Change						USA						SM1
Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group																																																																																												
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06/10/2025 0	Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States						SM1 Semimonthly Class (SATFRJ0)																																																																																												
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	If the Include History checkbox option was not selected, only the current row of data will display.																																																																																																									
6.	Click the Create Job Action button to add a new effective dated row. Create Job Action																																																																																																									



Step	Action
	The Create Job Action page displays in a pop-up window. 
7.	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. The effective date of Termination transactions is generally the day immediately following the last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "5/25/2026", the effective date of the termination should be "5/26/2026". 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.
8.	Click the Action field dropdown button and select "TER" (Termination). 
9.	Click the Reason field dropdown button and select the applicable reason ("UNS" has been selected for this example). 
	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
10.	Click the Continue button. 

The **Work Location** page displays.

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

Termination - Invol-Unsatisf Perf on Prob

Active

Next >

Work Location

Effective Date 05/26/2026 Effective Sequence 0

HR Status Inactive Payroll Status Terminated

*Job Indicator Primary Job

Position Number

Position Entry Date 10/17/2022

Regulatory Region USA

Business Unit 18100

Department 18100

Location RICH

Date Created 06/18/2026

Override Details

Position Managed Record No

Company DLI

Dept of Labor and Industry

Department Entry Date 10/17/2022

Establishment ID DOLI

Dept of Labor and Industry

Last Start Date 10/17/2022

Termination Date 05/25/2026

Override Last Date Worked

Last Date Worked 05/25/2026

STD Claim Number

Layoff Notice Date

Recall Eligibility Flag

Turn Off Auto Pay

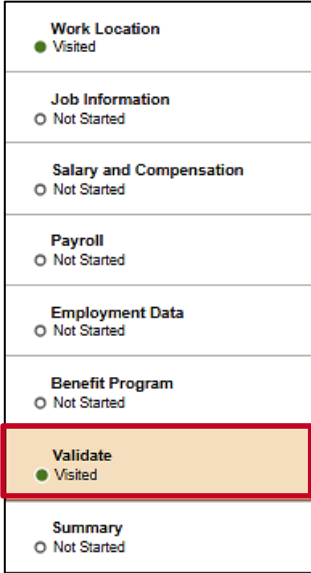
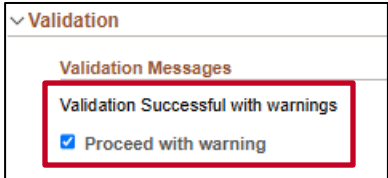
Leave With Pay Working

Yes No

Yes No

11.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Terminated”. 
-----	---



Step	Action
12.	Click the Validate tab. 
The Validate page displays. 	
13.	Review the Validate page and click the Validate button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable. 



Step

Action

The **Validate** page refreshes.

Validate

Effective Date 05/26/2026Effective Sequence 0

Validation

Use the Validate button to verify the entered data. This is an optional step but it is recommended to validate details and review warning and error messages

Messages

Validation Successful

14.

After validation, click the **Summary** tab.

Work Location

Visited

Job Information

Not Started

Salary and Compensation

Not Started

Payroll

Not Started

Employment Data

Not Started

Benefit Program

Not Started

Validate

Visited

Summary

Visited

The **Summary** page displays.

Termination - Invol-Unsatisf Perf on Prob

Previous

Submit

Work Location

Visited

Job Information

Not Started

Salary and Compensation

Not Started

Payroll

Not Started

Employment Data

Not Started

Benefit Program

Not Started

Validate

Visited

Summary

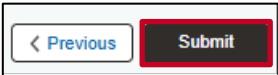
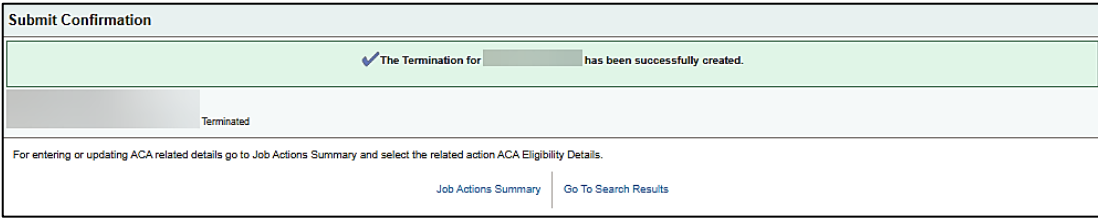
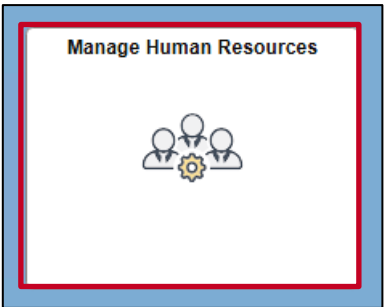
Visited

Summary

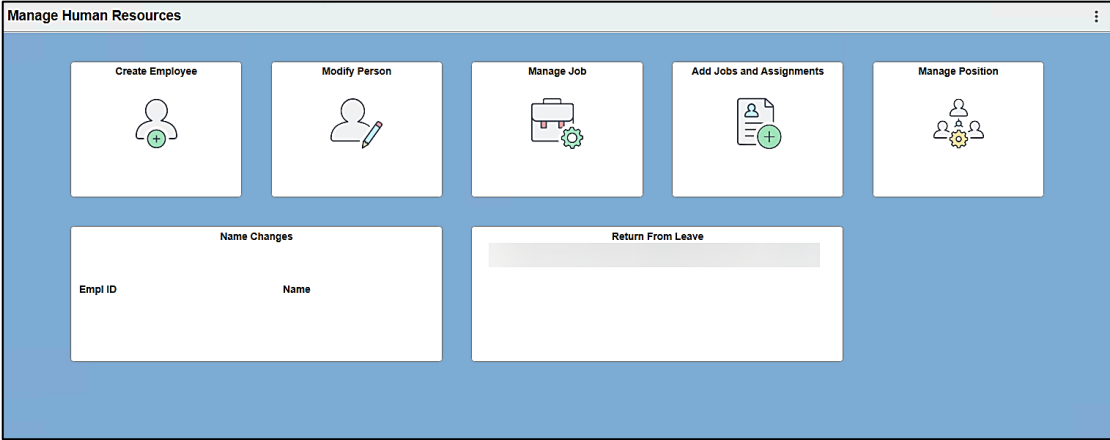
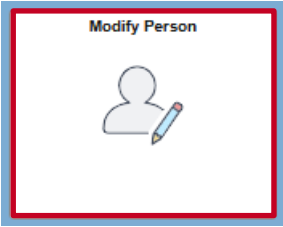
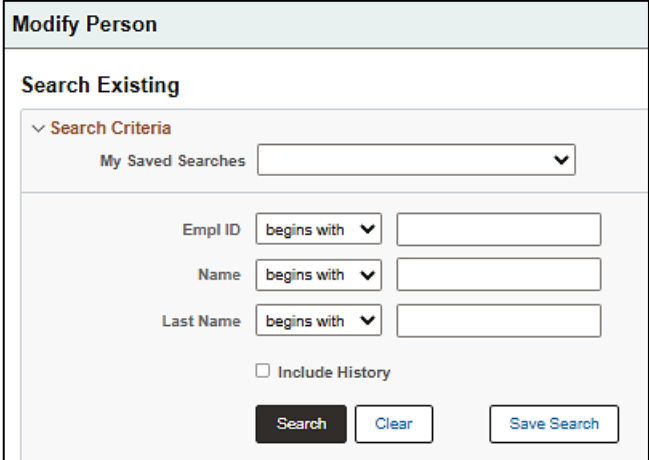
Effective Date 05/26/2026Effective Sequence 0

Summary of Changes

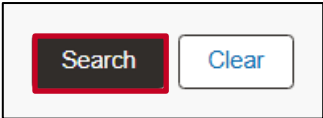
Field Label	Proposed Information	Current Information
Position Number	DLI00475-DLI00001	DLI00475-DLI00001
HR Status	Inactive	Active
Payroll Status	Terminated	Active
Termination Date	05/25/2026	Not Available
Last Date Worked	05/25/2026	Not Available
Changes Made		

Step	Action
15.	Review the Summary of Changes section and click the Submit button. 
The Submit Confirmation page displays confirming the change. 	
	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.
16.	Click the Home button to navigate back to the Cardinal HCM Homepage. 
17.	Navigate to the Modify Person page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 

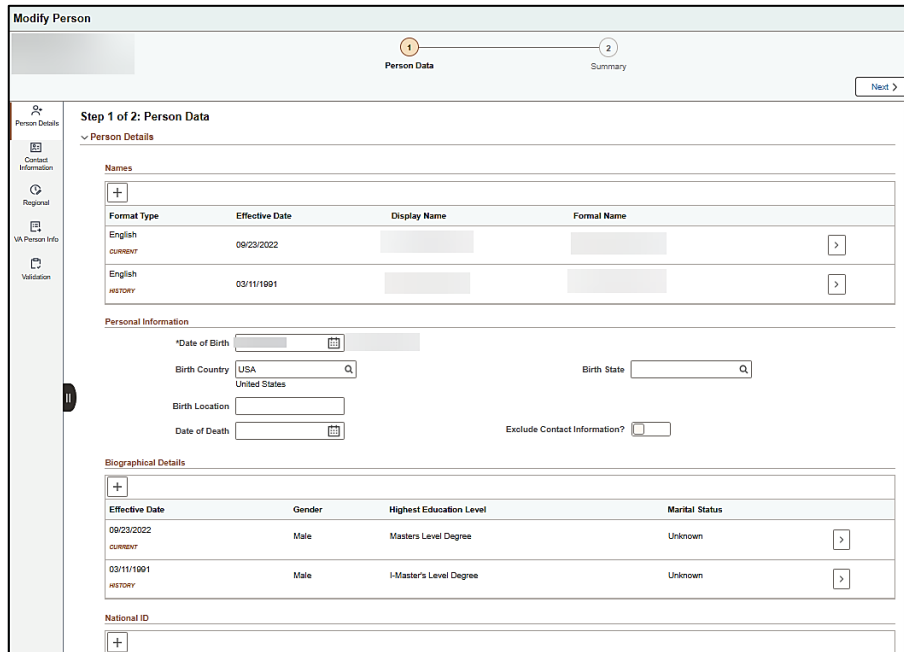


Step	Action
	The Manage Human Resources page displays. 
18.	Click the Modify Person tile. 
	The Modify Person Search Existing page displays. 



Step	Action
19.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various 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. 
20.	Select the Include History checkbox option. 
21.	Click the Search button. 

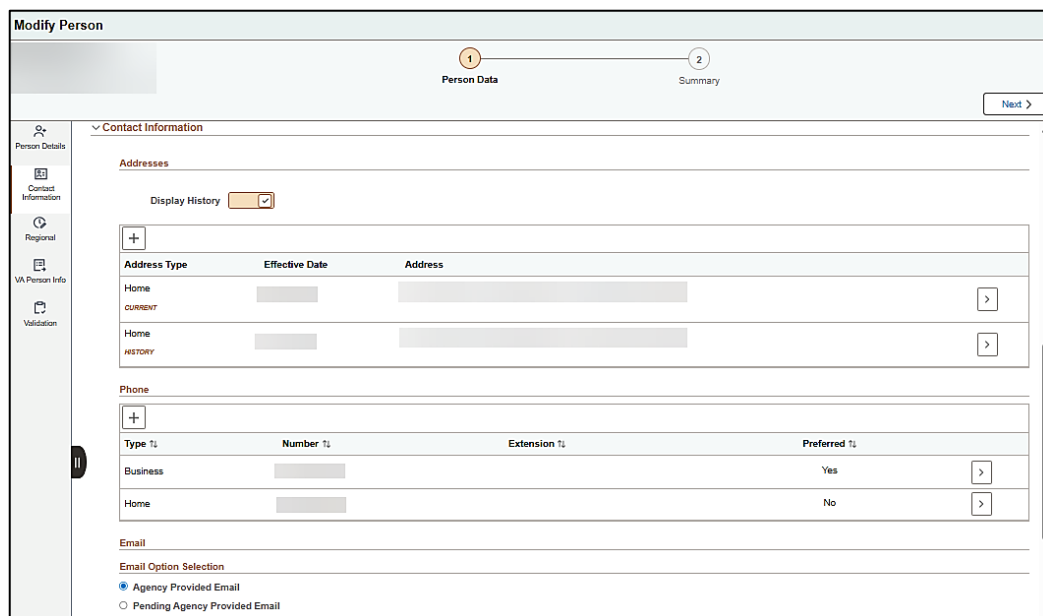
The **Modify Person** page displays (**Step 1 of 2: Person Data**) with the **Person Details** section displayed by default.





Step	Action
22.	Click the Contact Information tab. 

The **Contact Information** page displays.



Modify Person

Person Data Summary

Contact Information

Addresses

Display History ☒

Address Type	Effective Date	Address
Home		
CURRENT		
Home		
HISTORY		

Phone

Type %	Number %	Extension %	Preferred %
Business			Yes
Home			No

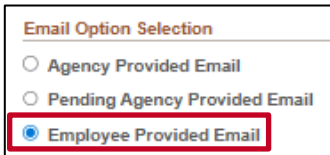
Email

Email Option Selection

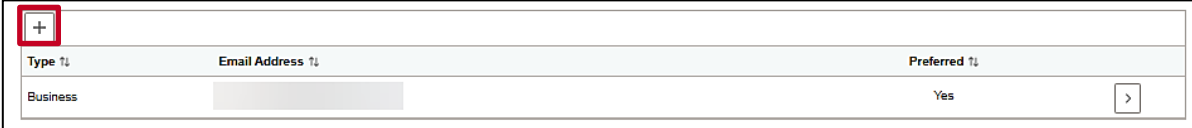
☐ Agency Provided Email

☐ Pending Agency Provided Email

☒ Employee Provided Email

23.	Select the Employee Provided Email radio button option in the Email Option Selection section. 
-----	--

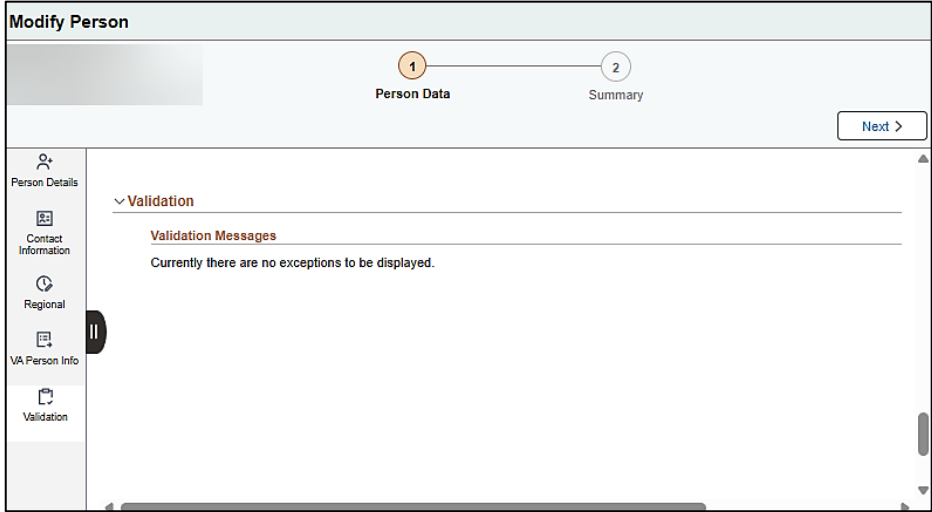
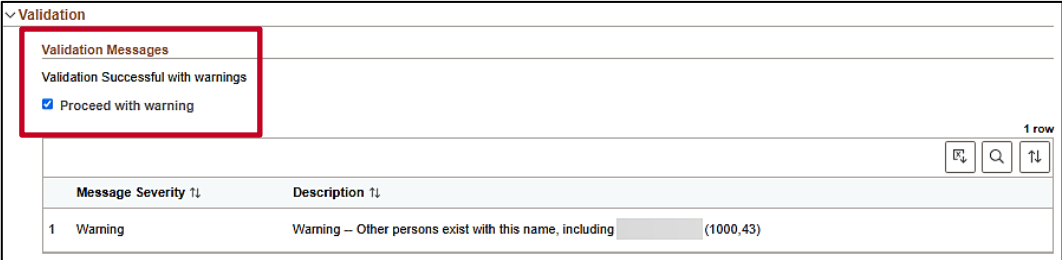


Step	Action
24.	Click the Add Email button (+) to add a personal email address. Note: If a personal email exists, this step is not needed. 
The Email Address page displays in a pop-up window. 	
25.	Click the Email Type dropdown button and select "Personal". 
26.	Enter the employee's personal email address in the Email Address field. 
27.	Click the Done button. 

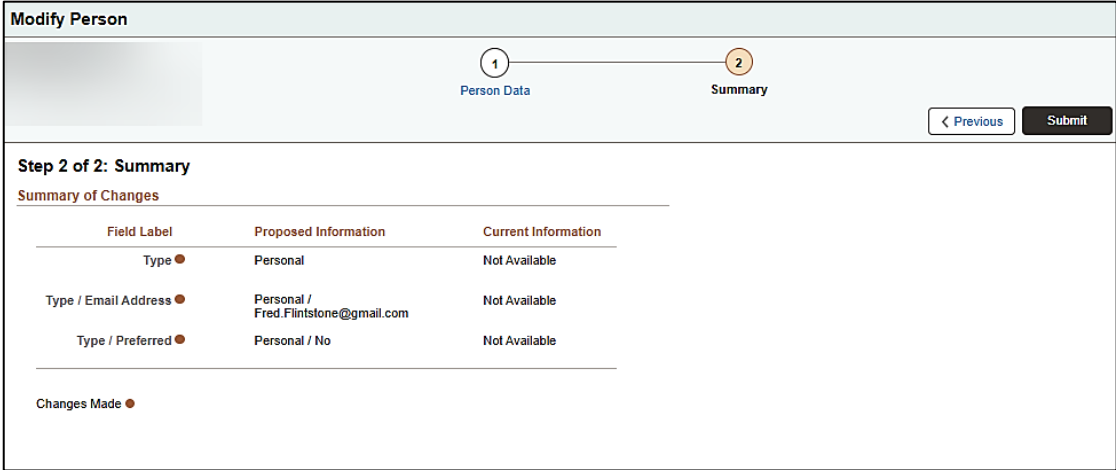
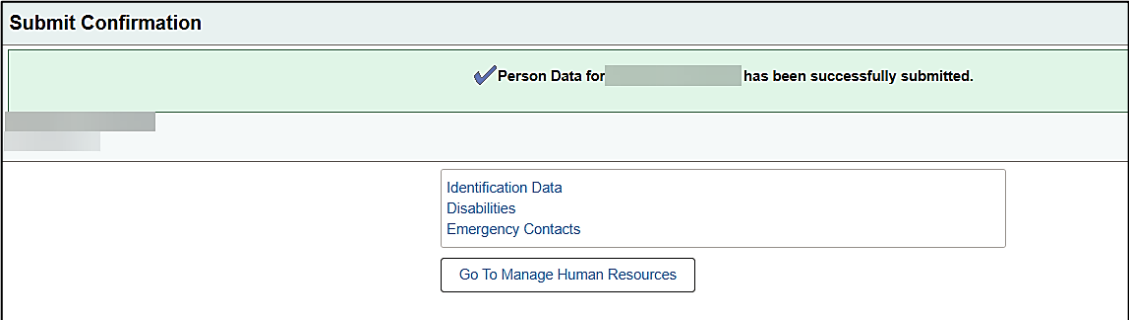


Step	Action												
	The Email Option Selection section refreshes. Email Email Option Selection Agency Provided Email Pending Agency Provided Email Employee Provided Email 1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except: 2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov + <table><tr><th>Type ↑↓</th><th>Email Address ↑↓</th><th>Preferred ↑↓</th><th></th></tr><tr><td>Business</td><td>@doli.virginia.gov</td><td>Yes</td><td>></td></tr><tr><td>Personal</td><td>Fred.Flintstone@gmail.com</td><td>No</td><td>></td></tr></table>	Type ↑↓	Email Address ↑↓	Preferred ↑↓		Business	@doli.virginia.gov	Yes	>	Personal	Fred.Flintstone@gmail.com	No	>
Type ↑↓	Email Address ↑↓	Preferred ↑↓											
Business	@doli.virginia.gov	Yes	>										
Personal	Fred.Flintstone@gmail.com	No	>										
i	When the Employee Provided Email radio button option is selected, the Personal email address will update to “Yes” in the Preferred column after validation and submission, and the Business email address is removed. 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 + <table><tr><th>Type ↑↓</th><th>Email Address ↑↓</th><th>Preferred ↑↓</th><th></th></tr><tr><td>Personal</td><td>Fred.Flintstone@gmail.com</td><td>Yes</td><td>></td></tr></table>	Type ↑↓	Email Address ↑↓	Preferred ↑↓		Personal	Fred.Flintstone@gmail.com	Yes	>				
Type ↑↓	Email Address ↑↓	Preferred ↑↓											
Personal	Fred.Flintstone@gmail.com	Yes	>										
28.	Click the Validation tab. Person Details Contact Information Regional VA Person Info Validation												



Step	Action														
	The Validation page displays. 														
29.	Review the Validation page and click the Next button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable.  <table><tr><th colspan="2">Validation</th></tr><tr><td colspan="2">Validation Messages</td></tr><tr><td colspan="2">Validation Successful with warnings</td></tr><tr><td colspan="2">☒ Proceed with warning</td></tr><tr><td colspan="2">1 row</td></tr><tr><td>Message Severity ↑↓</td><td>Description ↑↓</td></tr><tr><td>1 Warning</td><td>Warning — Other persons exist with this name, including (1000,43)</td></tr></table>	Validation		Validation Messages		Validation Successful with warnings		☒ Proceed with warning		1 row		Message Severity ↑↓	Description ↑↓	1 Warning	Warning — Other persons exist with this name, including (1000,43)
Validation															
Validation Messages															
Validation Successful with warnings															
☒ Proceed with warning															
1 row															
Message Severity ↑↓	Description ↑↓														
1 Warning	Warning — Other persons exist with this name, including (1000,43)														



Step	Action
	The Step 2 of 2: Summary page displays. 
30.	Review the Summary of Changes section and click the Submit button. 
	The Submit Confirmation page displays. 
31.	Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report
32.	Print the report and place the printed transaction in the employee file for future audit requests. 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.

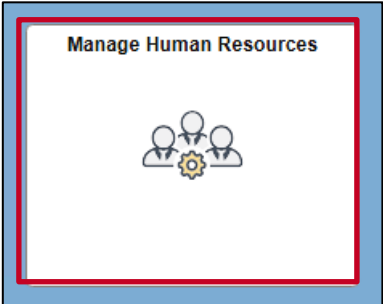


Long Term Disability Not Working

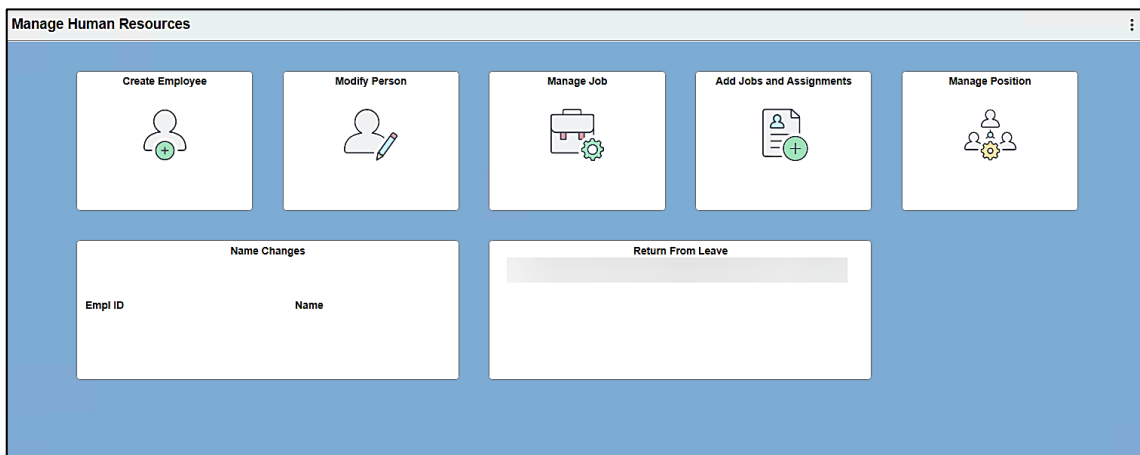
If there is a lag between STD workday 125 and the LTD claim approval, the Agency is asked to place the employee in Unpaid Leave of Absence (LOA), Personal (PER), and change benefits eligibility to COVA 100% EE Paid Grp Bill until the LTD claim is approved.

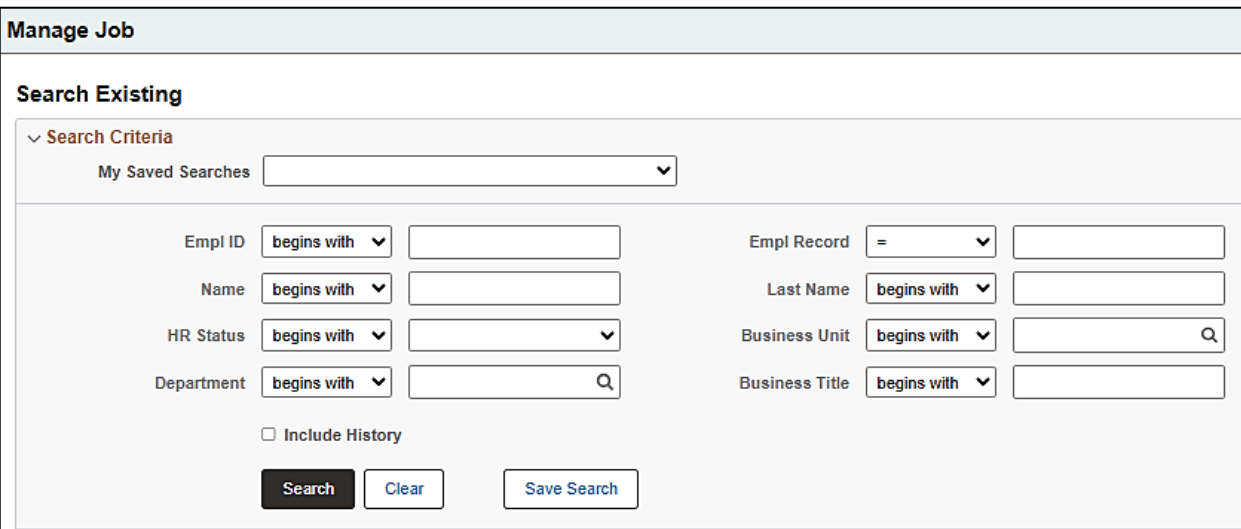
After the LTD claim has been approved by the third-party administrator (TPA), enter the transaction to terminate ("Termination - LTD ") the employee. This action must be processed in Cardinal for the employee to enroll in the COVA LTD/Retiree healthcare plan.

Note: For further information pertaining to Leaves of Absence, see the Cross Functional Job Aids titled **Processing Paid Leaves of Absence in Cardinal** and **Processing Unpaid Leaves of Absence in Cardinal** located on the Cardinal website in **Job Aids** under **Learning**.

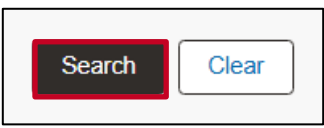
Step	Action
1.	Navigate to the Manage Job page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 

The **Manage Human Resources** page displays.



Step	Action
2.	Click the Manage Job tile. 
The Manage Job Search Existing 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 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 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. 



Step	Action
4.	Select the Include History checkbox option. 
5.	Click the Search button. 

The **Job Actions Summary** page displays for the selected employee.

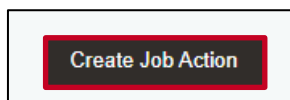
Job Actions Summary													
Active													Create Job Action
													Update/Display Include History
Job Actions Summary													
Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company Pay Group
11/08/2025 0	Active Primary Job	Position Change Reports To/Supv Change		Completed				USA United States					SM1 Semimontl Class (SATFR10)
10/25/2025 0	Active Primary Job	Position Change Reports To/Supv Change		Completed				USA United States					SM1 Semimontl Class (SATFR10)
06/10/2025 0	Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States					SM1 Semimontl Class (SATFR10)
03/12/2025 0	Active Primary Job	Data Change Data Change		Completed				USA United States					SM1 Semimontl Class (SATFR10)
09/17/2024 0	Active Primary Job	Position Change Position Data Update		Completed				USA United States					SM1 Semimontl Class (SATFR10)
06/10/2024	Active	Pay Rate Change						USA					SM1



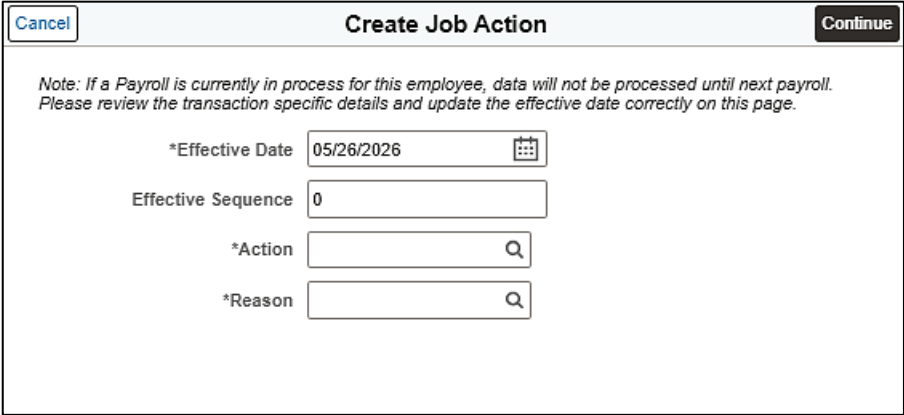
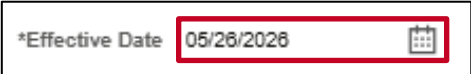
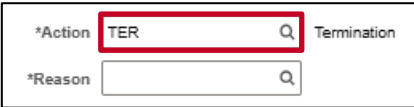
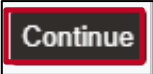
If the **Include History** checkbox option was not selected, only the current row of data will display.

6.

Click the **Create Job Action** button to add a new effective dated row.





Step	Action
	The Create Job Action page displays in a pop-up window. 
7.	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. The effective date of Termination transactions is generally the day immediately following the last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "5/25/2026", the effective date of the termination should be "5/26/2026". 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.
8.	Click the Action field dropdown button and select "TER" (Termination). 
9.	Click the Reason field dropdown button and select the applicable reason ("LTD" has been selected for this example). 
10.	Click the Continue button. 



Human Resources Job Aid

HR351 Separation Statuses

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

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

Termination - Invol-Unsatisf Perf on Prob

Active Next >

Work Location ☒ Visited Job Information ☐ Not Started Salary and Compensation ☐ Not Started Payroll ☐ Not Started Employment Data ☐ Not Started Benefit Program ☐ Not Started Validate ☐ Not Started Summary ☐ Not Started	Work Location Effective Date 05/26/2026 HR Status Inactive *Job Indicator Primary Job Effective Sequence 0 Payroll Status Terminated Position Number Position Entry Date 10/17/2022 Regulatory Region USA United States Business Unit 18100 Dept of Labor and Industry Department 18100 DEPT OF LABOR AND INDUSTRY Location RICH Dept of Labor and Industry Date Created 06/18/2026 Last Start Date 10/17/2022 Termination Date 05/25/2026 Override Last Date Worked ☐ Last Date Worked 05/25/2026 STD Claim Number Layoff Notice Date Recall Eligibility Flag ☐ Turn Off Auto Pay ☐ Yes ☒ No Leave With Pay Working ☐ Yes ☒ No
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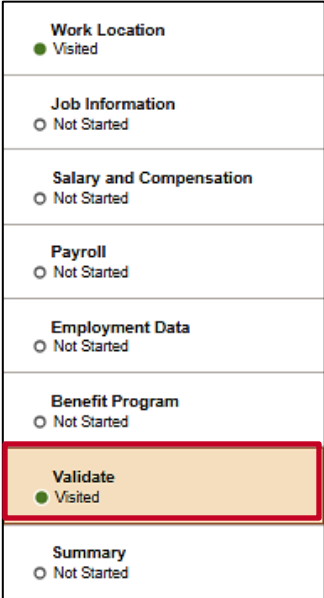
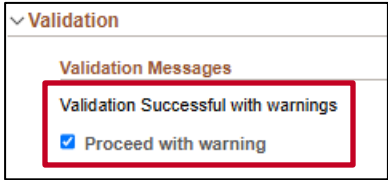
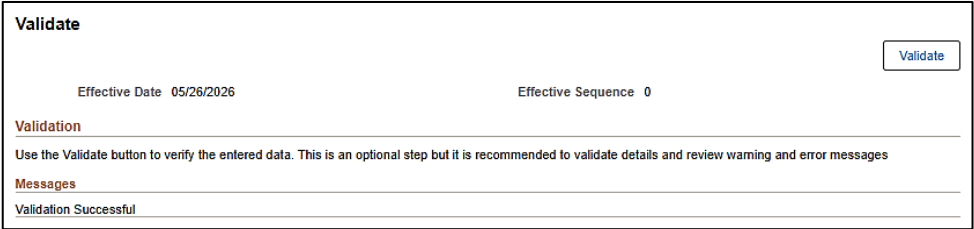
11. Validate that the **HR Status** displays as “Inactive” and the **Payroll Status** displays as “Terminated”.

Work Location

Effective Date 05/26/2026
 HR Status Inactive
 *Job Indicator Primary Job

Effective Sequence 0
 Payroll Status Terminated



Step	Action
12.	Click the Validate tab. 
13.	Review the Validate page and click the Validate button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable. 
The Validate page refreshes. 	

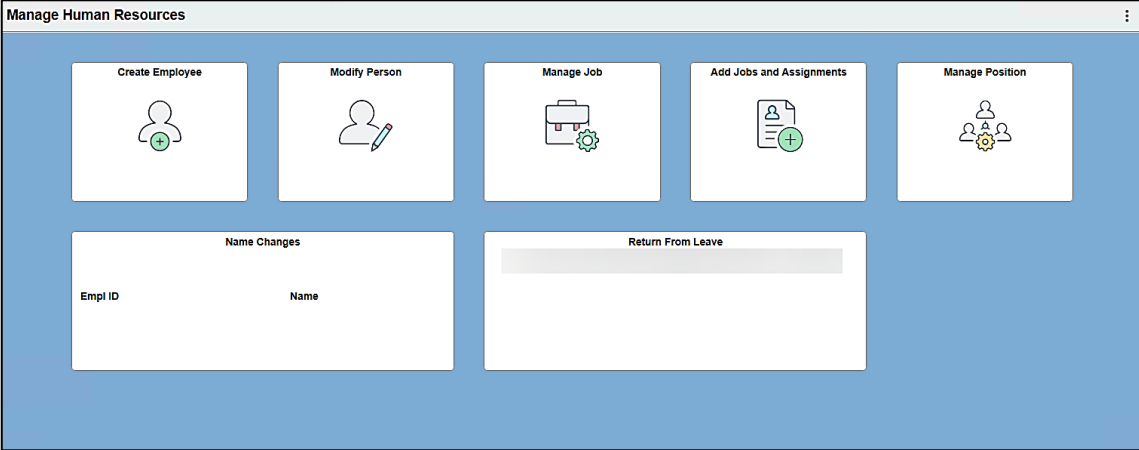


Step	Action																					
14.	After validation, click the Summary tab. Work Location Visited Job Information Not Started Salary and Compensation Not Started Payroll Not Started Employment Data Not Started Benefit Program Not Started Validate Visited Summary Visited																					
The Summary page displays. Termination - Termination - LTD < Previous Submit Work Location Visited Job Information Not Started Salary and Compensation Not Started Payroll Not Started Employment Data Not Started Benefit Program Not Started Validate Visited Summary Visited Summary Effective Date 05/26/2026 Effective Sequence 0 Summary of Changes <table><tr><th>Field Label</th><th>Proposed Information</th><th>Current Information</th></tr><tr><td>Position Number</td><td>DLI00088-DLI00062</td><td>DLI00088-DLI00062</td></tr><tr><td>HR Status ●</td><td>Inactive</td><td>Active</td></tr><tr><td>Payroll Status ●</td><td>Terminated</td><td>Active</td></tr><tr><td>Termination Date ●</td><td>05/25/2026</td><td>Not Available</td></tr><tr><td>Last Date Worked ●</td><td>05/25/2026</td><td>Not Available</td></tr><tr><td>Changes Made ●</td><td></td><td></td></tr></table>		Field Label	Proposed Information	Current Information	Position Number	DLI00088-DLI00062	DLI00088-DLI00062	HR Status ●	Inactive	Active	Payroll Status ●	Terminated	Active	Termination Date ●	05/25/2026	Not Available	Last Date Worked ●	05/25/2026	Not Available	Changes Made ●		
Field Label	Proposed Information	Current Information																				
Position Number	DLI00088-DLI00062	DLI00088-DLI00062																				
HR Status ●	Inactive	Active																				
Payroll Status ●	Terminated	Active																				
Termination Date ●	05/25/2026	Not Available																				
Last Date Worked ●	05/25/2026	Not Available																				
Changes Made ●																						
15.	Review the Summary of Changes section if applicable and click the Submit button. < Previous Submit																					



Step	Action
	The Submit Confirmation page displays confirming the change. Submit Confirmation ✓ The Termination for [redacted] has been successfully created. Terminated For entering or updating ACA related details go to Job Actions Summary and select the related action ACA Eligibility Details. Job Actions Summary Go To Search Results
	For COV-Agency Employees Only: VITA will interface all Separation transactions into the Active Directory Extract which will automatically terminate the employee's access from all COV specific systems. This VITA activity removes the COV computer access for these employees. • Update the Primary email address from the Business email address to the employee's Personal email address These changes to the Primary email are necessary so that the employee can access Cardinal Employee Self-Service using their Personal email while on extended leave. • Notify the employee that they will need to register for Cardinal Employee Self-Service using their personal email address Refer to Steps 17 – 32 of the previous sections to update the email address if applicable.

Retirement – VRS Retiree

Step	Action
1.	Navigate to the Manage Job page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
2.	Click the Manage Job tile. 

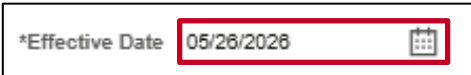
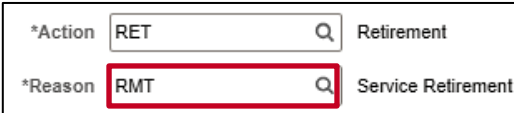


Step	Action
	The Manage Job Search Existing page displays. Manage Job Search Existing ▼ Search Criteria My Saved Searches Empl ID begins with ▼ Empl Record = ▼ Name begins with ▼ Last Name begins with ▼ HR Status begins with ▼ Business Unit begins with ▼ Department begins with ▼ Business Title begins with ▼ ☐ Include History Search Clear Save Search
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages 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 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.	Select the Include History checkbox option. ☒ Include History Search Clear Save Search
5.	Click the Search button. Search Clear



Step	Action																																																																																										
	The Job Actions Summary page displays for the selected employee Job Actions Summary Create Job Action Update/Display Include History Job Actions Summary <table border="1"><thead><tr><th>Effective Date / Sequence</th><th>HR / Payroll Status / Job Indicator</th><th>Action / Reason</th><th>Last Updated By / Date</th><th>Status</th><th>Job Code</th><th>Position</th><th>Reports To</th><th>Regulatory Region</th><th>Business Unit</th><th>Department</th><th>Location</th><th>Establishment ID</th><th>Company</th><th>Pay Group</th></tr></thead><tbody><tr><td>11/01/2025 0</td><td>Active Active Primary Job</td><td>Position Change Position Data Update</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td>18100 Dept of Labor and Industry</td><td>18100 DEPT OF LABOR AND INDUSTRY</td><td>RICH Dept of Labor and Industry</td><td>DOLI Dept of Labor and Industry</td><td>DLI Dept of Labor and Industry</td><td>SM1 Semimonthly Class (SATFRI07)</td></tr><tr><td>10/30/2025 0</td><td>Active Active Primary Job</td><td>Data Change Data Change</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td>18100 Dept of Labor and Industry</td><td>18100 DEPT OF LABOR AND INDUSTRY</td><td>RICH Dept of Labor and Industry</td><td>DOLI Dept of Labor and Industry</td><td>DLI Dept of Labor and Industry</td><td>SM1 Semimonthly Class (SATFRI07)</td></tr><tr><td>07/25/2025 0</td><td>Active Active Primary Job</td><td>Pay Rate Change Internal Alignment</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td>18100 Dept of Labor and Industry</td><td>18100 DEPT OF LABOR AND INDUSTRY</td><td>RICH Dept of Labor and Industry</td><td>DOLI Dept of Labor and Industry</td><td>DLI Dept of Labor and Industry</td><td>SM1 Semimonthly Class (SATFRI07)</td></tr><tr><td>06/10/2025 0</td><td>Active Active Primary Job</td><td>Pay Rate Change FY26 Statewide Increase</td><td></td><td>Completed</td><td></td><td></td><td></td><td>USA United States</td><td>18100 Dept of Labor and Industry</td><td>18100 DEPT OF LABOR AND INDUSTRY</td><td>RICH Dept of Labor and Industry</td><td>DOLI Dept of Labor and Industry</td><td>DLI Dept of Labor and Industry</td><td>SM1 Semimonthly Class (SATFRI07)</td></tr><tr><td>03/07/2025</td><td>Active</td><td>Position Change</td><td></td><td></td><td></td><td></td><td></td><td>USA</td><td>18100</td><td>18100</td><td>RICH</td><td>DOLI</td><td>DLI</td><td>SM1</td></tr></tbody></table>	Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group	11/01/2025 0	Active Active Primary Job	Position Change Position Data Update		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	10/30/2025 0	Active Active Primary Job	Data Change Data Change		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	07/25/2025 0	Active Active Primary Job	Pay Rate Change Internal Alignment		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	06/10/2025 0	Active Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	03/07/2025	Active	Position Change						USA	18100	18100	RICH	DOLI	DLI	SM1
Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group																																																																													
11/01/2025 0	Active Active Primary Job	Position Change Position Data Update		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)																																																																													
10/30/2025 0	Active Active Primary Job	Data Change Data Change		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)																																																																													
07/25/2025 0	Active Active Primary Job	Pay Rate Change Internal Alignment		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)																																																																													
06/10/2025 0	Active Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)																																																																													
03/07/2025	Active	Position Change						USA	18100	18100	RICH	DOLI	DLI	SM1																																																																													
	If the Include History checkbox option was not selected, only the current row of data will display.																																																																																										
6.	Click the Create Job Action button to add a new effective dated row. Create Job Action																																																																																										
	The Create Job Action page displays in a pop-up window. Cancel Create Job Action Continue Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page. *Effective Date 05/26/2026 Effective Sequence 0 *Action *Reason																																																																																										



Step	Action
7.	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. The effective date of Termination transactions is generally the day immediately following the last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "5/25/2026", the effective date of the termination should be "5/26/2026". 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.
8.	Click the Action field dropdown button and select "RET" (Retirement). 
9.	Click the Reason field dropdown button and select the applicable reason ("RMT" has been selected for this example). 
	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.
10.	Click the Continue button. 

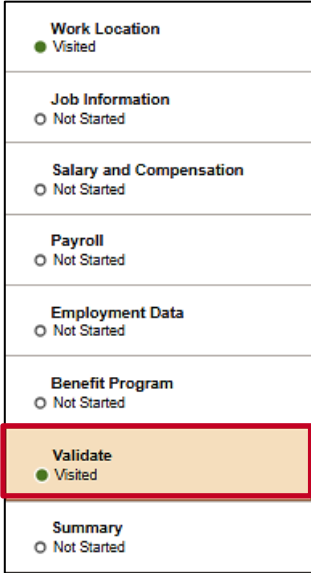
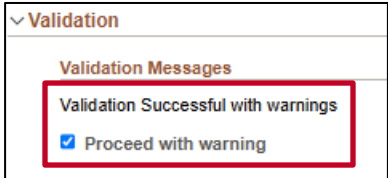


Human Resources Job Aid

HR351 Separation Statuses

Step	Action
	The Work Location page displays. Note: After selecting the Action and Action Reason, the HR Status and Payroll Status fields automatically update. Retirement - Service Retirement Next > Work Location Visited Job Information Not Started Salary and Compensation Not Started Payroll Not Started Employment Data Not Started Benefit Program Not Started Validate Not Started Summary Not Started Work Location Effective Date 05/26/2026 Effective Sequence 0 HR Status Inactive Payroll Status Retired *Job Indicator Primary Job Position Number Position Entry Date 05/25/2024 Regulatory Region USA United States Business Unit 18100 Dept of Labor and Industry Department 18100 DEPT OF LABOR AND INDUSTRY Location RICH Dept of Labor and Industry Date Created 06/19/2026 Last Start Date 05/25/2024 Termination Date 05/25/2026 Override Last Date Last Date Worked 05/25/2026 Job History Override Details Position Managed Record No Company DLI Dept of Labor and Industry Department Entry Date 05/25/2024 Establishment ID DOLI Dept of Labor and Industry
11.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Retired”. Work Location Effective Date 06/20/2026 Effective Sequence 0 HR Status Inactive Payroll Status Retired *Job Indicator Primary Job

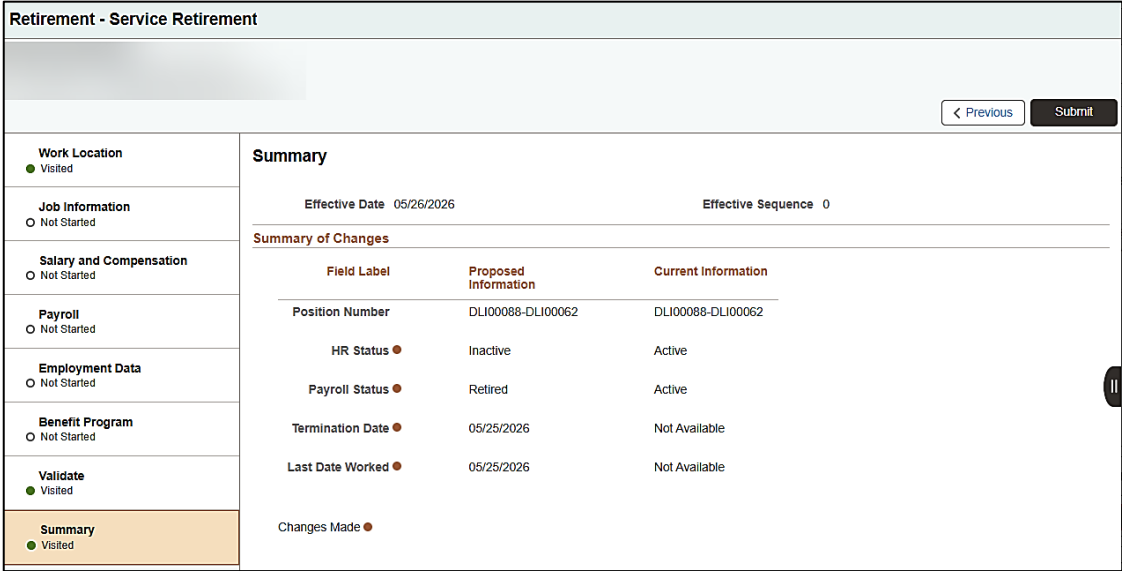
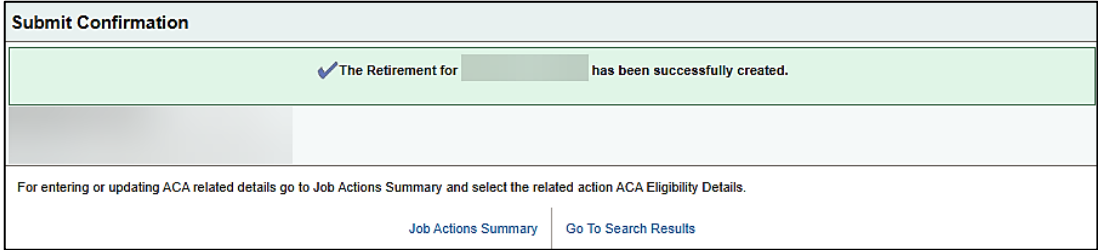


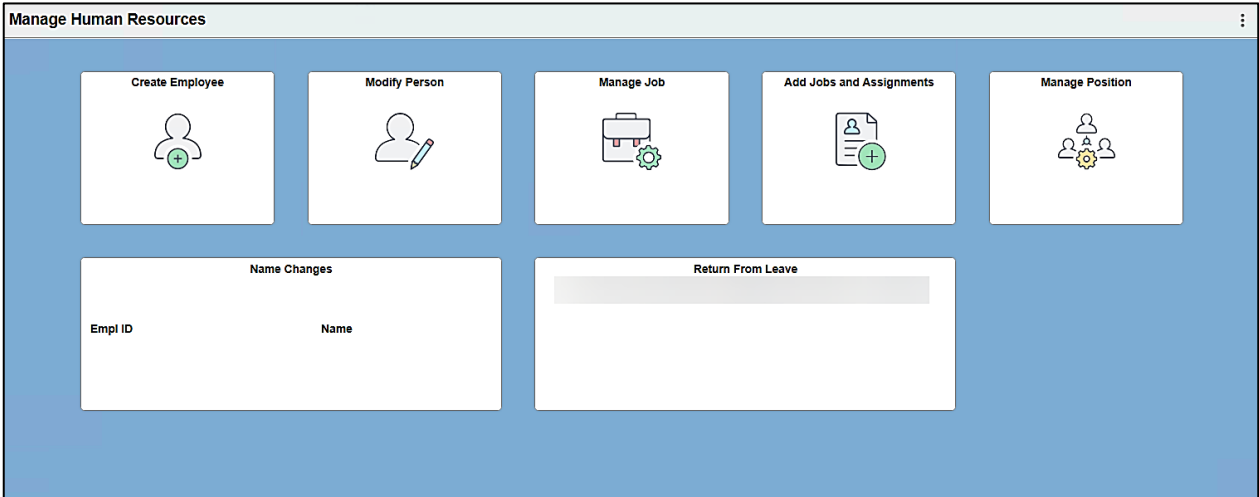
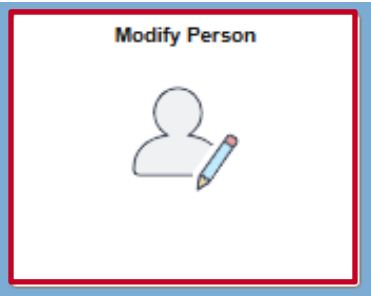
Step	Action
12.	Click the Validate tab. 
The Validate page displays. 	
13.	Review the Validate page and click the Validate button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable. 



Step	Action
	The Validate page refreshes. Validate Effective Date 05/26/2026 Effective Sequence 0 Validate Validation Use the Validate button to verify the entered data. This is an optional step but it is recommended to validate details and review warning and error messages Messages Validation Successful with warnings 1 row Message Severity ↑↓ Message Text ↑↓ 1 Warning Warning -- The employee's HR primary job (as determined by the Job Indicator) has been terminated. (1000,606)
14.	After validation, click the Summary tab. Work Location ● Visited Job Information ○ Not Started Salary and Compensation ○ Not Started Payroll ○ Not Started Employment Data ○ Not Started Benefit Program ○ Not Started Validate ● Visited Summary ● Visited



Step	Action
	The Summary page displays. 
15.	Review the Summary of Changes section and click the Submit button. 
	The Submit Confirmation page displays confirming the change. 
	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.
16.	Click the Home button to navigate back to the Cardinal HCM Homepage. 

Step	Action
17.	Navigate to the Modify Person page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
18.	Click the Modify Person tile. 



Step	Action
	The Modify Person Search Existing page displays. Modify Person Search Existing ▼ Search Criteria My Saved Searches Empl ID begins with ▼ Name begins with ▼ Last Name begins with ▼ ☐ Include History Search Clear Save Search
19.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various 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 ▼
20.	Select the Include History checkbox option. ☒ Include History Search Clear Save Search
21.	Click the Search button. Search Clear



Step	Action
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The **Modify Person** page displays (**Step 1 of 2: Person Data**) with the **Person Details** section displayed by default.

Modify Person

1 Person Data 2 Summary [Next >](#)

Step 1 of 2: Person Data

Person Details
Contact Information
Regional
VA Person Info
Validation

Names

Format Type	Effective Date	Display Name	Formal Name
English CURRENT	09/23/2022		
English HISTORY	03/11/1991		

Personal Information

*Date of Birth
Birth Country Birth State
United States
Birth Location
Date of Death Exclude Contact Information? ☐

Biographical Details

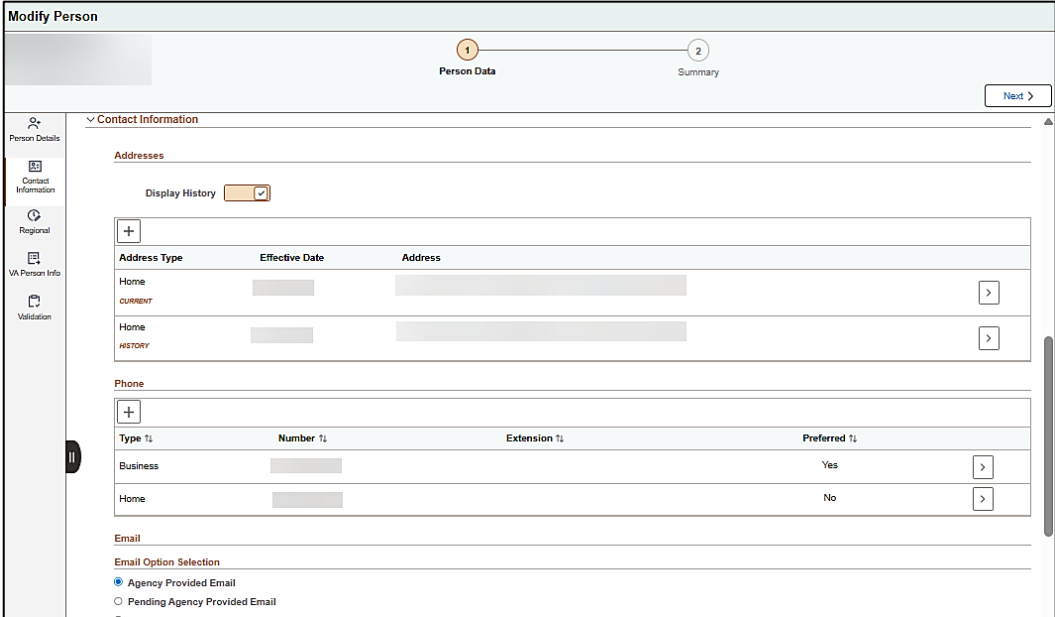
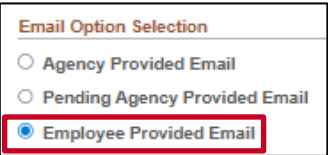
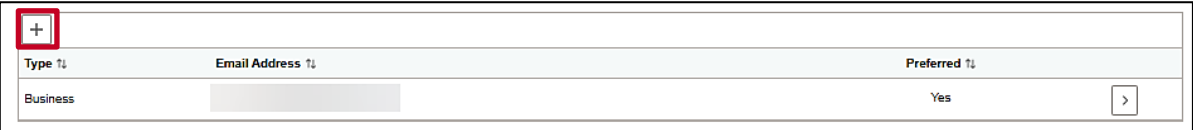
Effective Date	Gender	Highest Education Level	Marital Status
09/23/2022 CURRENT	Male	Masters Level Degree	Unknown
03/11/1991 HISTORY	Male	I-Master's Level Degree	Unknown

National ID

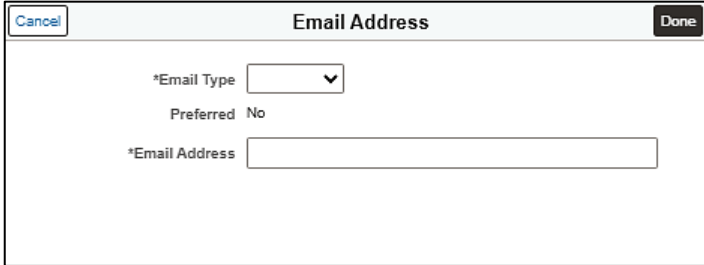
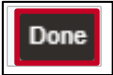
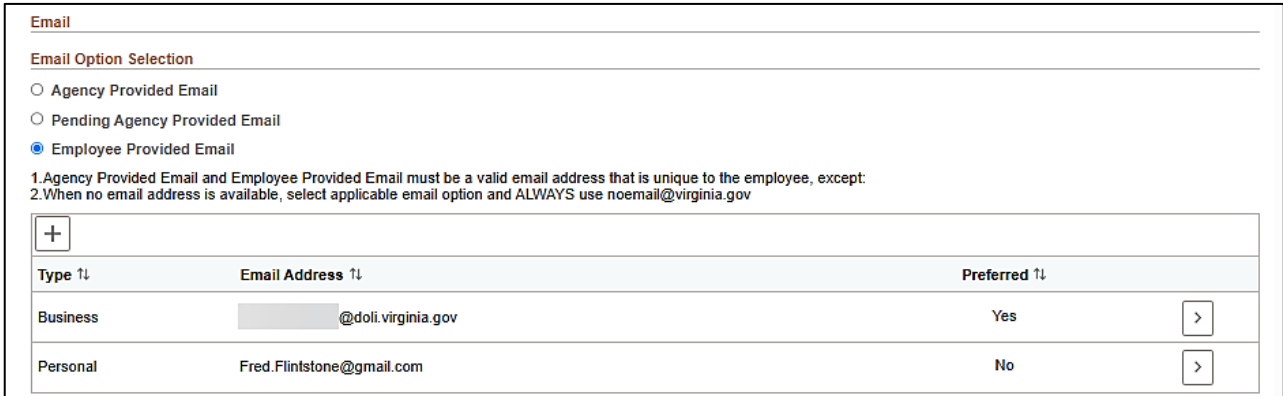
22. Click the **Contact Information** tab.

Person Details
Contact Information
Regional
VA Person Info
Validation



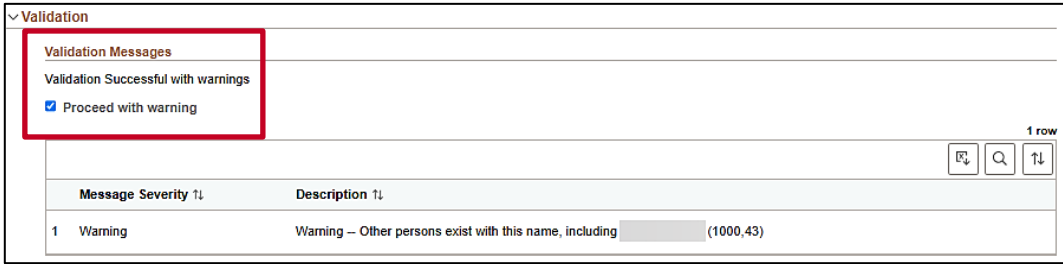
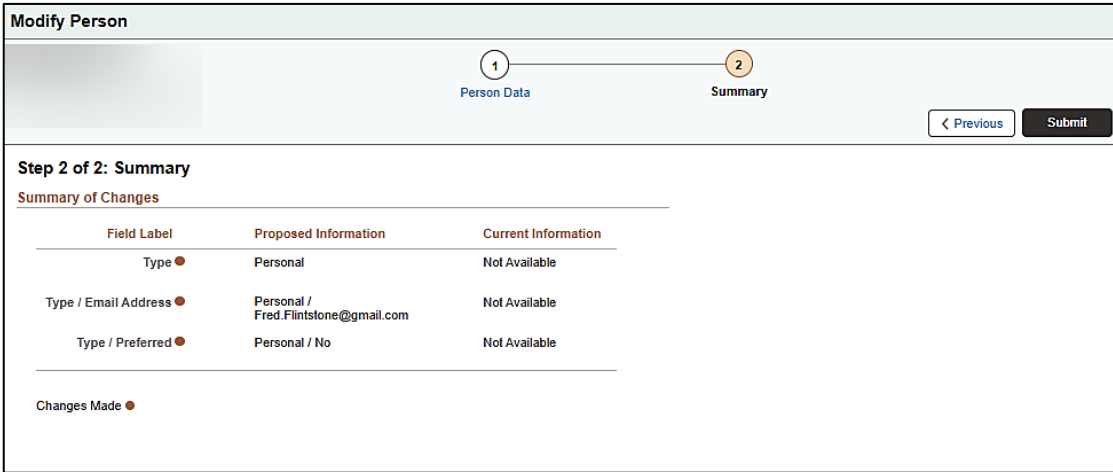
Step	Action
	The Contact Information page displays. 
23.	Select the Employee Provided Email radio button option in the Email Option Selection section. 
24.	Click the Add Email button (+) to add a personal email address. Note: If a personal email exists, this step is not needed. 



Step	Action
	The Email Address page displays in a pop-up window. 
25.	Click the Email Type dropdown button and select "Personal". 
26.	Enter the employee's personal email address in the Email Address field. 
27.	Click the Done button. 
	The Email Option Selection section refreshes. 



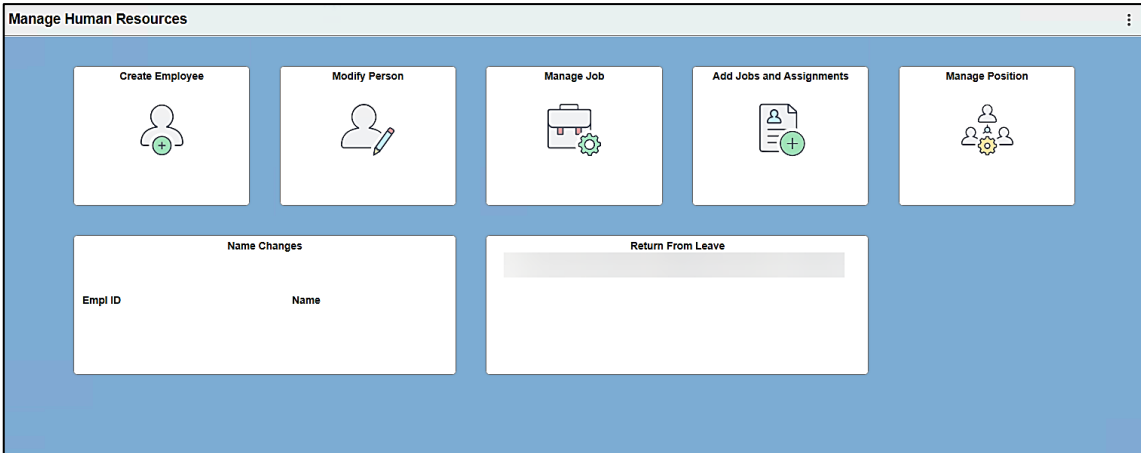
Step	Action
i	When the Employee Provided Email radio button option is selected, the Personal email address will update to “Yes” in the Preferred column after validation and submission, and the Business email address is removed. Email Option Selection Agency Provided Email Pending Agency Provided Email 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 Type 1: Email Address 1: Preferred 1: Personal Fred.Flintstone@gmail.com Yes
28.	Click the Validation tab. Person Details Contact Information Regional VA Person Info Validation
The Validation page displays. Modify Person 1 Person Data 2 Summary Next > Person Details Contact Information Regional VA Person Info Validation Validation Validation Messages Currently there are no exceptions to be displayed.	

Step	Action
29.	Review the Validation page and click the Next button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable. 
The Step 2 of 2: Summary page displays. 	
30.	Review the Summary of Changes section and click the Submit button. 



Step	Action
	The Submit Confirmation page displays. Submit Confirmation ✓ Person Data for [REDACTED] has been successfully submitted. Identification Data Disabilities Emergency Contacts Go To Manage Human Resources
31.	Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report
32.	Print the report and place the printed transaction in the employee file for future audit requests. 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 .

Retirement – ORP Retiree

Step	Action
1.	Navigate to the Manage Job page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
2.	Click the Manage Job tile. 



Step	Action
	The Manage Job Search Existing page displays. Manage Job Search Existing ▼ Search Criteria My Saved Searches Empl ID begins with ▼ Empl Record = ▼ Name begins with ▼ Last Name begins with ▼ HR Status begins with ▼ Business Unit begins with ▼ Department begins with ▼ Business Title begins with ▼ ☐ Include History Search Clear Save Search
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages 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 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.	Select the Include History checkbox option. ☒ Include History Search Clear Save Search
5.	Click the Search button. Search Clear



Step	Action
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The **Job Actions Summary** page displays for the selected employee.

Job Actions Summary															
Job Actions Summary															
Effective Date / Sequence	HR / Payroll Status / Job Indicator	Action / Reason	Last Updated By / Date	Status	Job Code	Position	Reports To	Regulatory Region	Business Unit	Department	Location	Establishment ID	Company	Pay Group	
11/01/2025 0	Active Active Primary Job	Position Change Position Data Update		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	
10/30/2025 0	Active Active Primary Job	Data Change Data Change		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	
07/25/2025 0	Active Active Primary Job	Pay Rate Change Internal Alignment		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	
06/10/2025 0	Active Active Primary Job	Pay Rate Change FY26 Statewide Increase		Completed				USA United States	18100 Dept of Labor and Industry	18100 DEPT OF LABOR AND INDUSTRY	RICH Dept of Labor and Industry	DOLI Dept of Labor and Industry	DLI Dept of Labor and Industry	SM1 Semimonthly Class (SATFRI07)	
03/07/2025	Active	Position Change						USA	18100	18100	RICH	DOLI	DLI	SM1	



If the **Include History** checkbox option was not selected, only the current row of data will display.

6.

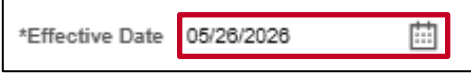
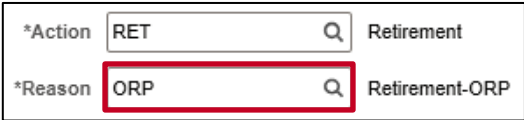
Click the **Create Job Action** button to add a new effective dated row.

Create Job Action

The **Create Job Action** page displays in a pop-up window.

Cancel	Create Job Action	Continue
<i>Note: If a Payroll is currently in process for this employee, data will not be processed until next payroll. Please review the transaction specific details and update the effective date correctly on this page.</i>		
*Effective Date	05/26/2026	
Effective Sequence	0	
*Action		
*Reason		

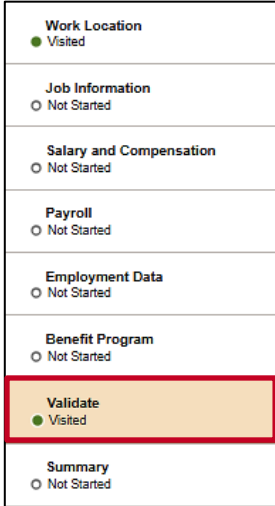
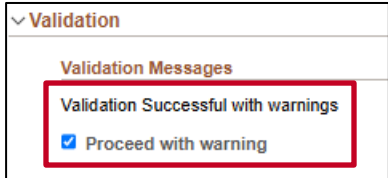


Step	Action
7.	Update the effective date as needed using the Effective Date Calendar icon. 
	Set the effective date to be one day after the employee's last day worked. The effective date of Termination transactions is generally the day immediately following the last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "5/25/2026", the effective date of the termination should be "5/26/2026". 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.
8.	Click the Action field dropdown button and select "RET" (Retirement). 
9.	Click the Reason field dropdown button and select the applicable reason ("ORP" has been selected for this example). 
	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.
10.	Click the Continue button. 



Step	Action
	The Work Location page displays. Note: After selecting the Action and Action Reason, the HR Status and Payroll Status fields automatically update. Retirement - Retirement-ORP Active Next > Work Location Visited Job Information Not Started Salary and Compensation Not Started Payroll Not Started Employment Data Not Started Benefit Program Not Started Validate Not Started Summary Not Started Work Location Effective Date 05/26/2026 HR Status Inactive Effective Sequence 0 Payroll Status Retired *Job Indicator Primary Job Position Number Position Entry Date 06/01/1990 Regulatory Region USA United States Business Unit 18100 Dept of Labor and Industry Department 18100 DEPT OF LABOR AND INDUSTRY Location RICH Dept of Labor and Industry Date Created 06/19/2026 Last Start Date 04/01/1988 Override Last Date Worked Position Managed Record No Company DLI Dept of Labor and Industry Department Entry Date 04/01/1988 Establishment ID DOLI Dept of Labor and Industry Termination Date 05/25/2026 Last Date Worked 05/25/2026
11.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Retired”. Work Location Effective Date 06/20/2026 Effective Sequence 0 HR Status Inactive Payroll Status Retired *Job Indicator Primary Job



Step	Action
12.	Click the Validate tab. 
The Validate page displays. 	
13.	Review the Validate page and click the Validate button.  Note: Users should validate every transaction to review and address any warnings and/or errors that may have occurred. Warnings can be bypassed, but errors must be addressed before submitting. Select the Proceed with warning checkbox option if applicable. 



Step	Action
	The Validate page refreshes. Validate Effective Date 05/26/2026 Effective Sequence 0 Validation Use the Validate button to verify the entered data. This is an optional step but it is recommended to validate details and review warning and error messages Messages Validation Successful Validate
14.	After validation, click the Summary tab. Work Location ☒ Visited Job Information ☐ Not Started Salary and Compensation ☐ Not Started Payroll ☐ Not Started Employment Data ☐ Not Started Benefit Program ☐ Not Started Validate ☒ Visited Summary ☒ Visited



Step

Action

The **Summary** page displays.

Retirement - Retirement-ORP

Work Location

● Visited

Job Information

○ Not Started

Salary and Compensation

○ Not Started

Payroll

○ Not Started

Employment Data

○ Not Started

Benefit Program

○ Not Started

Validate

● Visited

Summary

● Visited

Summary

Effective Date 05/26/2026Effective Sequence 0

Summary of Changes

Field Label	Proposed Information	Current Information
Position Number	DLI00315-DLI00059	DLI00315-DLI00059
HR Status ●	Inactive	Active
Payroll Status ●	Retired	Active
Termination Date ●	05/25/2026	Not Available
Last Date Worked ●	05/25/2026	Not Available
Changes Made ●		

15.

Review the **Summary of Changes** section and click the **Submit** button.

< Previous

Submit

The **Submit Confirmation** page displays confirming the change.

Submit Confirmation

✓ The Retirement for [REDACTED] has been successfully created.

For entering or updating ACA related details go to Job Actions Summary and select the related action ACA Eligibility Details.

Job Actions Summary

Go To Search Results

i

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

16.

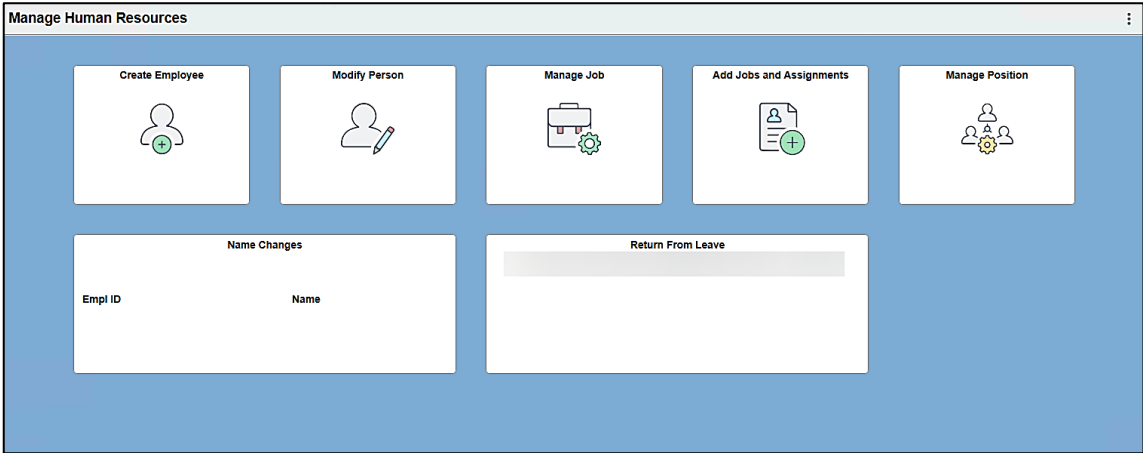
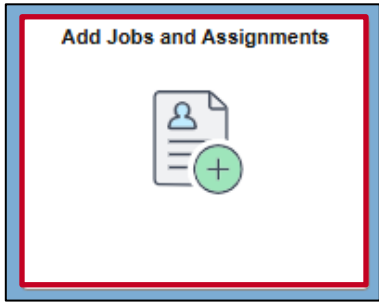
Click the **Home** button to navigate back to the **Cardinal HCM Homepage**.

Home

Notifications

Menu

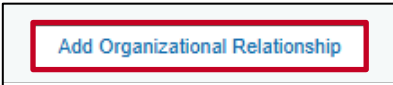
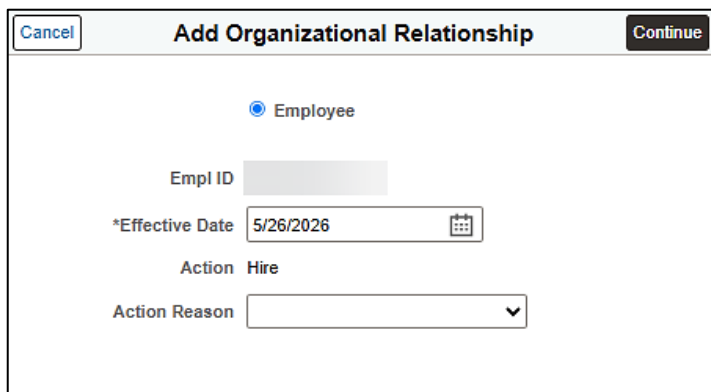
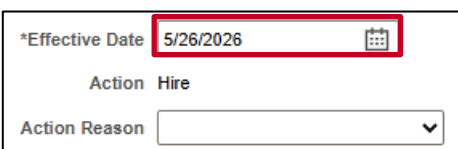
Profile

Step	Action
17.	Navigate to the Add Employee Relationship page by clicking the Manage Human Resources tile on the Cardinal HCM Homepage. 
The Manage Human Resources page displays. 	
18.	Click the Add Jobs and Assignments tile. 



Step	Action																								
	The Organizational Relationships Search Existing page displays. Organizational Relationship Search Existing ▼ Search Criteria My Saved Searches Empl ID begins with ▼ Name begins with ▼ Last Name begins with ▼ Search Clear Save Search Basic Search																								
19.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various 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 ▼																								
20.	Click the Search button. Search Clear																								
	The Organizational Relationship page displays for the applicable employee. Organizational Relationship Add Organizational Relationship ▼ Relationship - Employee Instance Nbr 0 HR Status Inactive Payroll Status Retired Last Hire Date 04/01/1988 Termination Date 05/25/2026 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><th></th></tr><tr><td>0</td><td>Home</td><td>05/26/2026</td><td>18100</td><td>18100</td><td>Inactive</td><td>04/01/1988</td><td></td></tr><tr><td>Primary Job</td><td></td><td></td><td>Dept of Labor and Industry</td><td>DEPT OF LABOR AND INDUSTRY</td><td>Retired</td><td>05/25/2026</td><td>Manage Job</td></tr></table>	Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date		0	Home	05/26/2026	18100	18100	Inactive	04/01/1988		Primary Job			Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Retired	05/25/2026	Manage Job
Employment Record / Job Indicator	Home/Host	Effective Date	Business Unit	Department	HR Status / Payroll Status	Start Date / Termination Date																			
0	Home	05/26/2026	18100	18100	Inactive	04/01/1988																			
Primary Job			Dept of Labor and Industry	DEPT OF LABOR AND INDUSTRY	Retired	05/25/2026	Manage Job																		

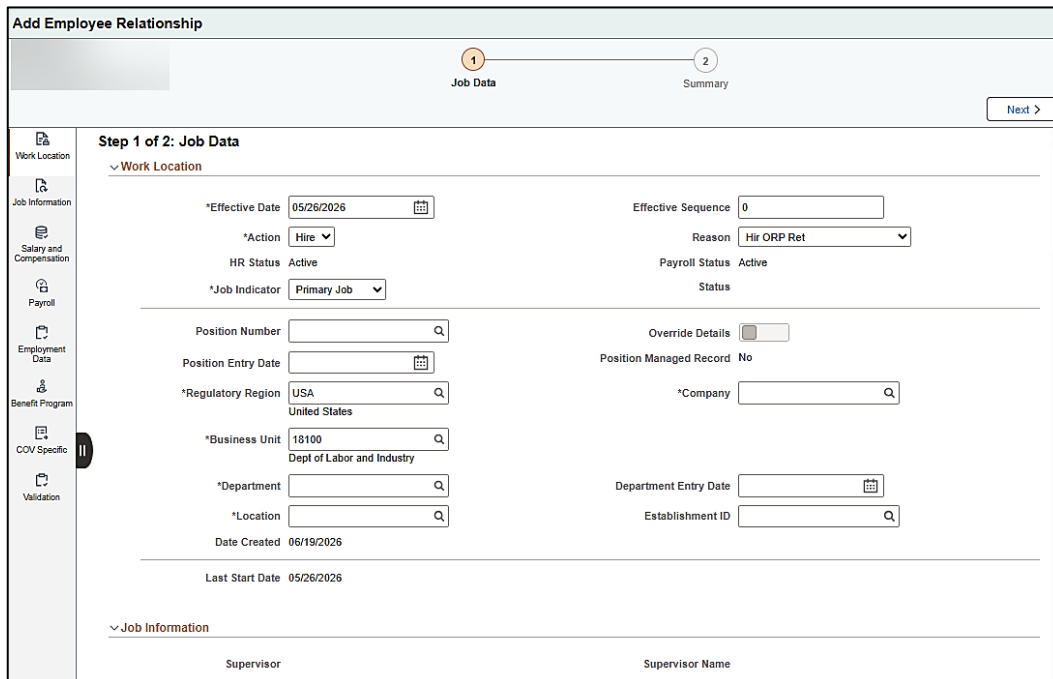


Step	Action
21.	Click the Add Organizational Relationship button. 
The Add Organizational Relationship page displays in a pop-up window. 	
22.	The Effective Date field defaults to the current system date. Update this date as needed using the Calendar icon. 
23.	The Action field defaults to "Hire" and cannot be changed. 
24.	Click the Action Reason dropdown button and select "Hir ORP Ret". 
	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
25.	Click the Continue button. 

The **Add Employee Relationship** page displays (**Step 1 of 2: Job Data**) with the **Work Location** section displayed by default.



Add Employee Relationship

1 Job Data 2 Summary [Next >](#)

Step 1 of 2: Job Data

Work Location

*Effective Date: 05/26/2026 Effective Sequence: 0

*Action: Hire Reason: Hir ORP Ret

HR Status: Active Payroll Status: Active

*Job Indicator: Primary Job Status:

Position Number: Position Entry Date:

*Regulatory Region: USA United States Position Managed Record: No

*Business Unit: 18100 Dept of Labor and Industry *Company:

*Department: Department Entry Date:

*Location: Establishment ID:

Date Created: 06/19/2026

Last Start Date: 05/26/2026

Job Information

Supervisor Supervisor Name

26.	Locate and select the ORP position for the Agency using the Position Number Look up icon. Note: Enter “%ORP” to search for the ORP Position Number. 
-----	---



Step	Action														
	The Position Lookup page displays in a pop-up window. Cancel Lookup Search for: Position Number > Search Criteria Search Results 1 row <table><thead><tr><th>Position Number</th><th>Description</th><th>Position Status</th><th>Business Unit</th><th>Department</th><th>Job Code</th><th>Reports To Position Number</th></tr></thead><tbody><tr><td>DLIORP00</td><td>ORP Retiree Position</td><td>Approved</td><td>18100</td><td>99999</td><td>ORPHBO</td><td></td></tr></tbody></table>	Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To Position Number	DLIORP00	ORP Retiree Position	Approved	18100	99999	ORPHBO	
Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To Position Number									
DLIORP00	ORP Retiree Position	Approved	18100	99999	ORPHBO										
27.	Click anywhere on the position row to select the ORP position. <table><thead><tr><th>Position Number</th><th>Description</th><th>Position Status</th><th>Business Unit</th><th>Department</th><th>Job Code</th><th>Reports To Position Number</th></tr></thead><tbody><tr><td>DLIORP00</td><td>ORP Retiree Position</td><td>Approved</td><td>18100</td><td>99999</td><td>ORPHBO</td><td></td></tr></tbody></table>	Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To Position Number	DLIORP00	ORP Retiree Position	Approved	18100	99999	ORPHBO	
Position Number	Description	Position Status	Business Unit	Department	Job Code	Reports To Position Number									
DLIORP00	ORP Retiree Position	Approved	18100	99999	ORPHBO										
	Agencies with ORP retirees assign the ORP retirees to a single ORP retiree position.														
	The Work Location section redisplay with the selected Position Number. Add Employee Relationship 1 Job Data 2 Summary Next > Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation *Effective Date 05/26/2026 *Action Hire HR Status Active *Job Indicator Primary Job Position Number DLIORP00 ORP Retiree Position Position Entry Date 05/26/2026 Regulatory Region USA United States Business Unit 18100 Dept of Labor and Industry Department 99999 Agency Wide Location RICH Dept of Labor and Industry Date Created 06/22/2026 Last Start Date 05/26/2026 Effective Sequence 0 Reason Hir ORP Ret Payroll Status Active Status Override Details Position Managed Record No Company DLI Dept of Labor and Industry Department Entry Date 05/26/2026 Establishment ID DOLI Dept of Labor and Industry														



Step	Action
28.	Click the Job Information tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

The **Job Information** section displays.

Work Location

Job Information

Salary and Compensation

Payroll

Employment Data

Benefit Program

COV Specific

Validation

Job Information

Supervisor

SOC CD

Job Code

ORPHBO

ORP Retiree

Supervisor Level

E

Employee

Reports To

Regular/Temporary

Regular

Employee Class

Regular Shift

Not Applicable

Classified Ind

Classified

Supervisor Name

Supervisor Posn

Job Entry Date

05/26/2026

Reports To Manager

Full/Part

Part-Time

*Officer Code

None

Shift Rate

Shift Factor

Standard Hours

Standard Hours

20.00

FTE

1.000000

Adds to FTE Actual Count?

Combined Standard Hours

20.00

Work Period

Weekly

As of Date

05/26/2026

Encumbrance Override

FTE

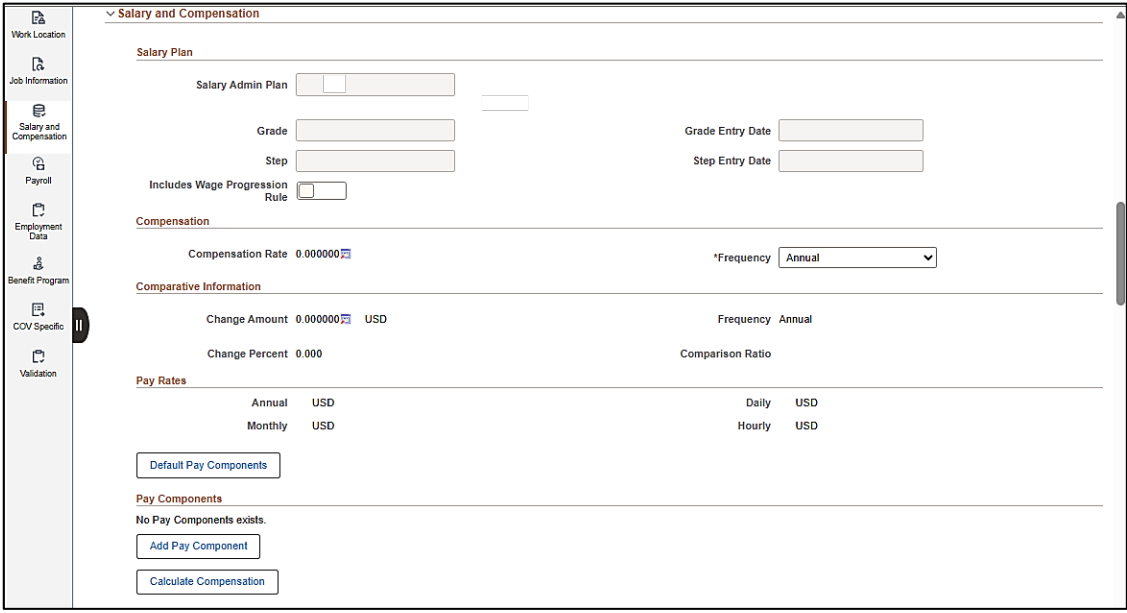
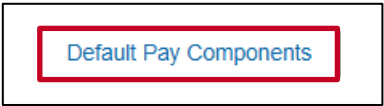
0.500000

> USA



Step	Action
29.	Click the Employee Class dropdown button and select “ORPRetiree”. Regular/Temporary Regular ▾ Employee Class ORPRetiree ▾
30.	Click the Salary and Compensation tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation



Step	Action
	The Salary and Compensation section displays. 
31.	Click the Frequency Look up icon and change the selection from “Annual” to “Monthly”. 
32.	Click the Defaults Pay Components button. 
33.	Click the Calculate Compensation button. Note: No additional Pay Components fields should be entered. 



Step	Action
34.	Click the Payroll tab. Work Location Job Information Salary and Compensation Payroll Employment Data Benefit Program COV Specific Validation

The **Payroll** section displays.

Work Location

Job Information

Salary and Compensation

Payroll

Employment Data

Benefit Program

COV Specific

Validation

Payroll

*Payroll System Payroll for North America

Absence System Other

Payroll for North America

Pay Group

Employee Type

Tax Location Code

GL Pay Type

[Edit ChartFields](#)

Holiday Schedule

FICA Status Subject

Combination Code

Employment Data

Organizational Instance

Instance Record 1

Original Start Date 05/26/2026 ☐ Override

First Start Date

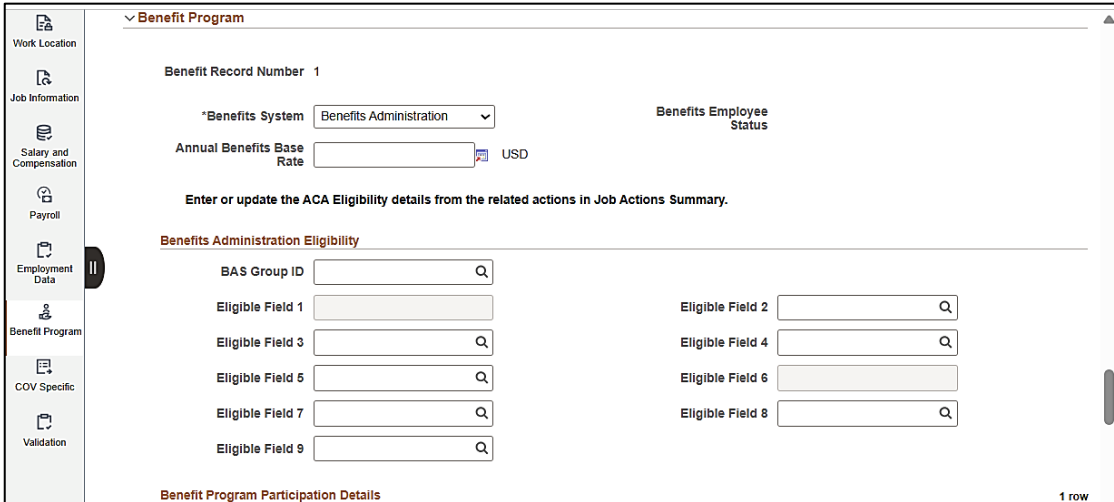
Last Start Date

Rev 9/1/2026

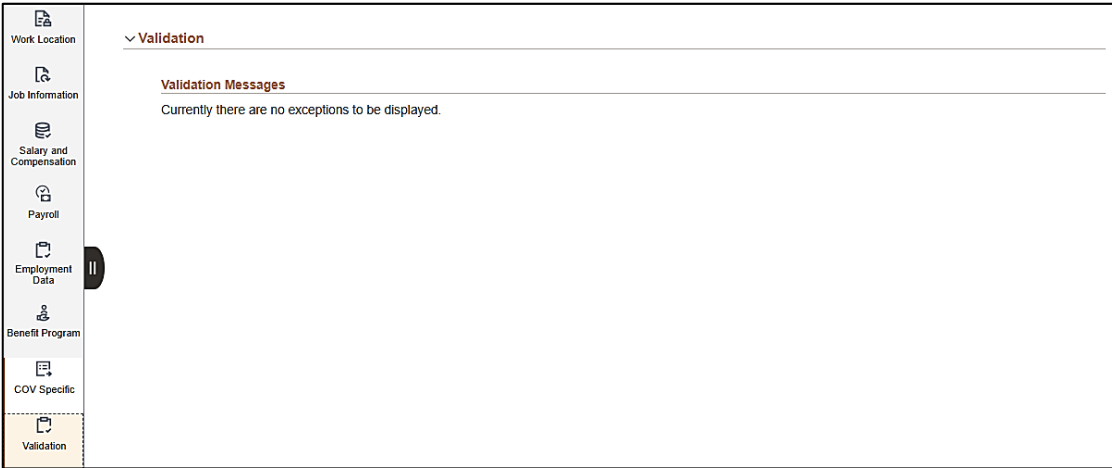
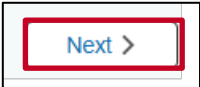
Page 75 of 81



Step	Action
	The Payroll System field defaults to “Payroll for North America”. Do not change. The Absence System field defaults to “Other”. Do not change. *Payroll System Payroll for North America ▼ Absence System Other ▼
35.	Click the Pay Group Look up icon and select “MNP”. Note: This is the Non-Payroll pay group. Once selected, the Employee Type field will default to “S” (Salaried). Pay Group MNP  Non-Payroll Employee Type S  Salaried
36.	Enter the applicable Tax Location Code in the Tax Location Code field. Tax Location Code
37.	Click the Benefit Program tab.  Work Location  Job Information  Salary and Compensation  Payroll  Employment Data  Benefit Program  COV Specific  Validation

Step	Action
	The Benefit Program section displays. 
38.	Use the Configuration Workbook to complete the Benefits Administration Eligibility Fields 2, 3, 8, and 9 based on the appropriate scenarios for the ORP Retiree. Complete the Benefits Administration Eligibility Fields 2, 3, 8, and 9 based on the appropriate scenarios for the ORP Retiree: • Field 2 – “007008000” is the ORP Retiree Value • Field 3 – “N” • Field 8 – select the applicable value (“12-12” in this example) • Field 9 – select the applicable value (“RR-GB” in this example) Note: If the retiree is selecting to decline medical coverage permanently, users must click Eligible Field 5 and select “TERM-RET”. 
	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.



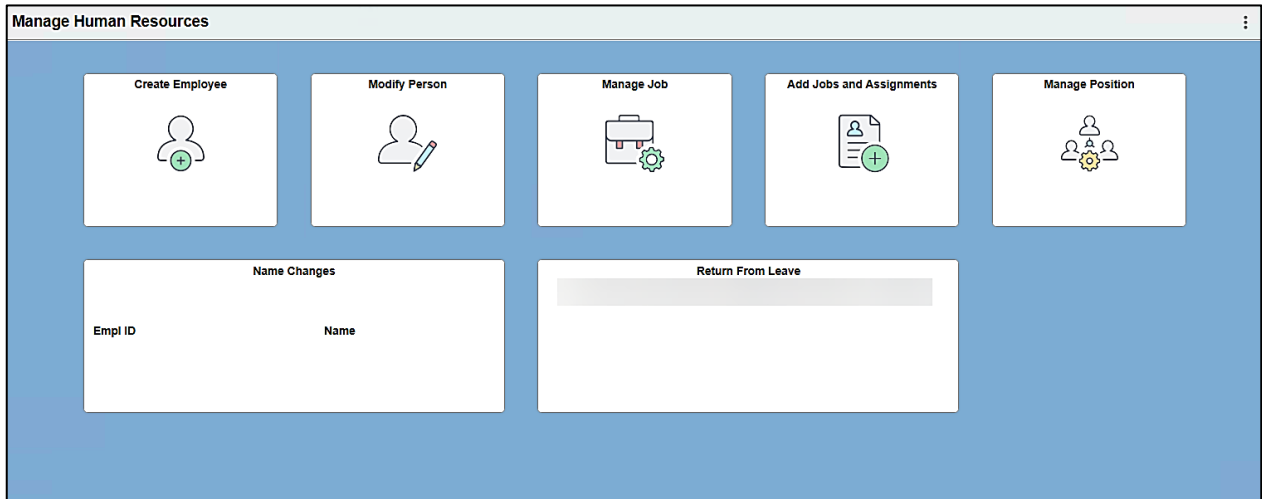
Step	Action
39.	Click the Validation tab. 
The Validation section displays. 	
40.	Click the Next button. 



Step	Action
	The Validation section redispays. Validation Validation Messages ☐ Proceed with warning Validation Successful with warnings 2 rows Message Severity 1 Message Text 1 1 Warning Warning -- Compensation Frequency has been updated. (1010,264) 2 Warning Warning -- Compensation Rate is zero. (1000,31)



Step	Action																												
	The Add Employee Relationship Step 2 of 2: Summary page displays. Add Employee Relationship 1 Job Data 2 Summary < PreviousSubmit Step 2 of 2: Summary Summary of Changes Job Data <table><thead><tr><th>Field Label</th><th>Proposed Information</th></tr></thead><tbody><tr><td>Position Number</td><td>DLIORP00-ORP Retiree Position</td></tr><tr><td>Regulatory Region</td><td>USA-United States</td></tr><tr><td>Company</td><td>DLI-Dept of Labor and Industry</td></tr><tr><td>Department</td><td>99999-Agency Wide</td></tr><tr><td>Location</td><td>RICH-Dept of Labor and Industry</td></tr><tr><td>Establishment ID</td><td>DOLI-Dept of Labor and Industry</td></tr><tr><td>Supervisor Level</td><td>E-Employee</td></tr><tr><td>Regular/Temporary</td><td>Regular</td></tr><tr><td>Full/Part</td><td>Part-Time</td></tr><tr><td>Employee Class</td><td>ORPRetiree</td></tr><tr><td>Officer Code</td><td>None</td></tr><tr><td>Standard Hours</td><td>20</td></tr><tr><td>ETC</td><td>1.000000</td></tr></tbody></table>	Field Label	Proposed Information	Position Number	DLIORP00-ORP Retiree Position	Regulatory Region	USA-United States	Company	DLI-Dept of Labor and Industry	Department	99999-Agency Wide	Location	RICH-Dept of Labor and Industry	Establishment ID	DOLI-Dept of Labor and Industry	Supervisor Level	E-Employee	Regular/Temporary	Regular	Full/Part	Part-Time	Employee Class	ORPRetiree	Officer Code	None	Standard Hours	20	ETC	1.000000
Field Label	Proposed Information																												
Position Number	DLIORP00-ORP Retiree Position																												
Regulatory Region	USA-United States																												
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Supervisor Level	E-Employee																												
Regular/Temporary	Regular																												
Full/Part	Part-Time																												
Employee Class	ORPRetiree																												
Officer Code	None																												
Standard Hours	20																												
ETC	1.000000																												

Step	Action
43.	Click the Go To Manage Human Resources link to return to the Human Resources page to update the ORP retiree's email address to their personal email address. 
The Manage Human Resources page displays. 	
44.	Click the Modify Person tile. 
45.	Repeat Steps 19-32 from the previous section of this Job Aid to complete the process of updating the ORP retiree's email address and running the Employee Activity Report.