

## Managing the Layoff Process Overview

The Layoff business process captures an employee's departure from an agency due to Layoff or Temporary Workforce Reduction (TWFR).

Prior to making any changes to an employee's record, validate that the layoff package is complete, and all information is noted as specific dates will be needed for effective dating of the Layoff transaction and the tracking of various dates on the Job Data Notepad. The **Layoff Notice Date** should be entered in accordance with the layoff policy as the date in which the first notice of layoff was issued to the employee. This documents the date the initial notice was provided to the employee.

This business process is applicable to state agencies with VPA employees.

After the Layoff transaction is saved, all HCM functional areas will be updated appropriately:

- Benefits status will be updated in Cardinal Benefits (BN); COBRA eligibility will be triggered if applicable
- Time Reporter will be updated for Cardinal TA. Productive and non-productive time can still be entered and approved prior to the effective date of the Layoff
- For agencies using the Cardinal Absence Management (AM) system, the updated HR status will stop leave accruals
- The updated Payroll status will not create a Paysheet for the employee

Agency HR will need to coordinate with agency Payroll and an agency Benefits Administrator (BA) for final pay, (e.g., salary, OT, leave payout) due the employee. Additional steps may be needed for a Paysheet to be created in order to make the final payment(s).

If there is a large volume of updates, the agency can submit a file to be uploaded using the mass upload process. For more information on Mass Updates see the Job Aid titled **Performing a Mass Upload** on the Cardinal website in **Job Aids** under **Learning**.

Involuntary Separation in the form of disciplinary action and Voluntary Separations in the form of retirement or resignation will not be covered in this Job Aid but can be found in the Job Aid titled **HR351\_Separation Statuses**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

**Note:** For Layoffs where Severance Payments and Health Benefits continue, follow **DHRM Policy 1.30**.

**Note:** For Layoffs where Severance Payments remain active and Health Benefits are inactive, follow **DHRM Policy 1.30**.

**Note:** For a Layoff Separation when Severance Benefits end, follow **DHRM Policy 1.57**.

**Navigation Note:** Please note that you may see 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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**Layoff**

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

**Menu > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.

### Job Data

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

[Find an Existing Value](#)

▼ **Search Criteria**

**Empl ID** begins with ▼

Empl Record = ▼

Name begins with ▼

Last Name begins with ▼

Second Last Name begins with ▼

Alternate Character Name begins with ▼

Middle Name begins with ▼

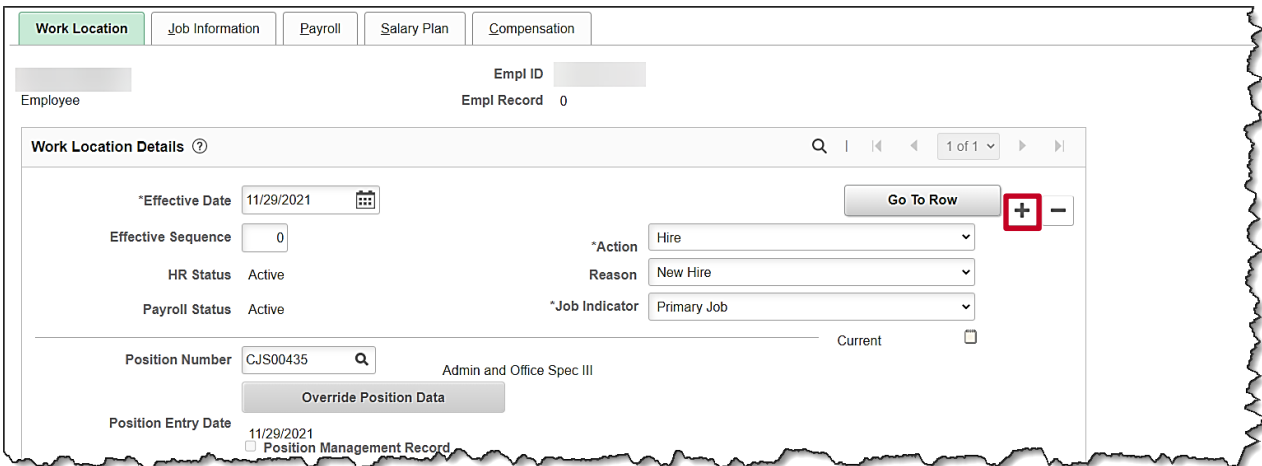
**Include History**  Correct History  Case Sensitive

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

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

2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.
3. Click the **Include History** checkbox.
4. Click the **Search** button.

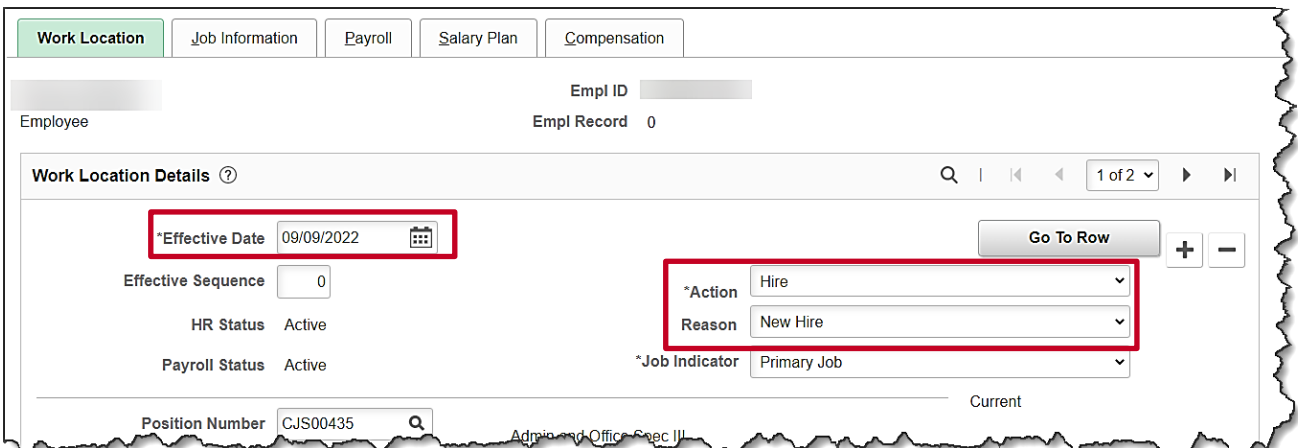
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section contains the following fields: \*Effective Date (11/29/2021), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Position Number (CJS00435), Position Entry Date (11/29/2021), \*Action (Hire), Reason (New Hire), and \*Job Indicator (Primary Job). A red box highlights the '+ -' button next to the 'Go To Row' button.

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

The **Job Data** page refreshes with a new effective dated row displayed.



The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section now contains two rows. The first row has an effective date of 09/09/2022. A red box highlights the '+ -' button next to the 'Go To Row' button.

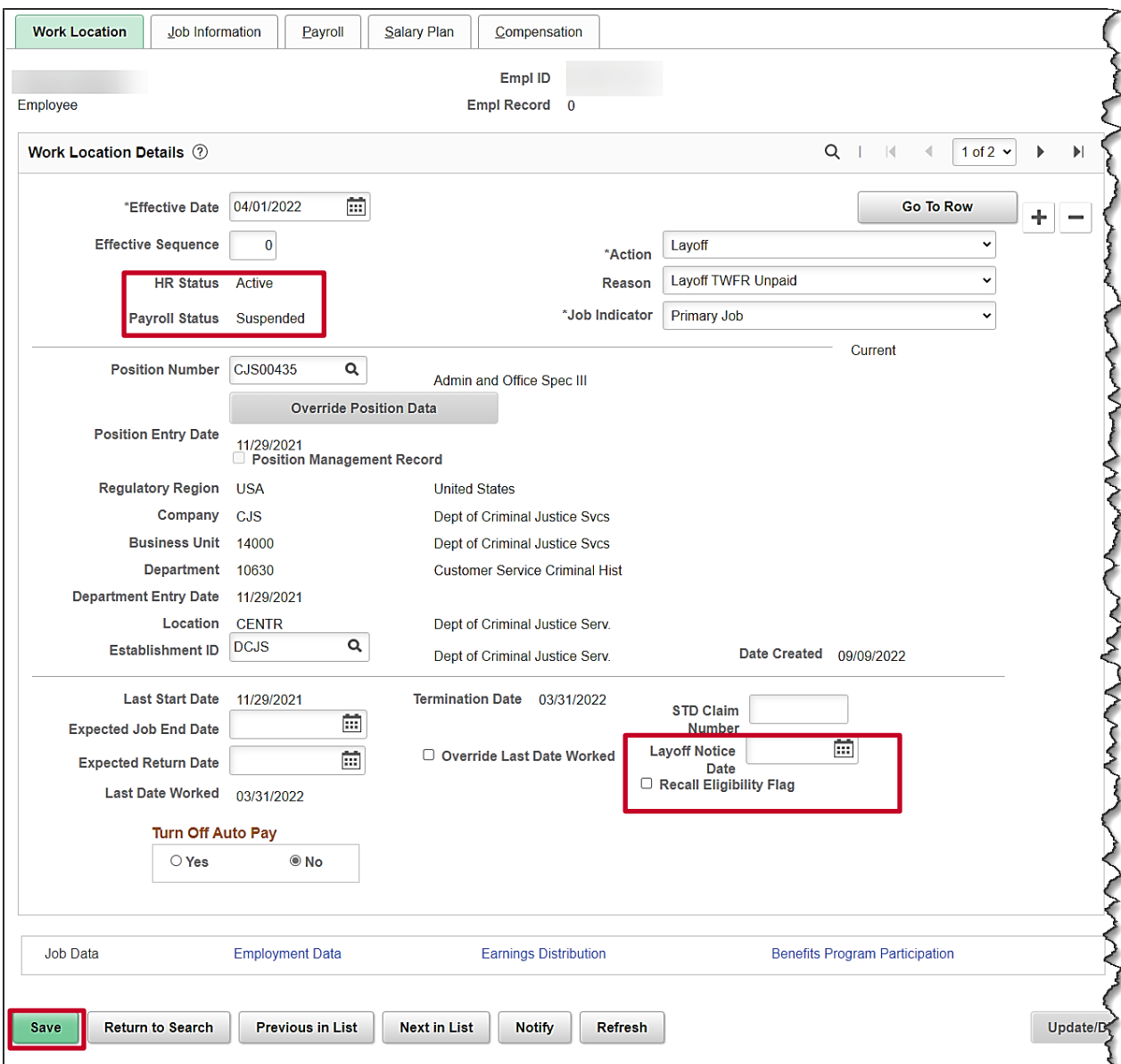
**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row.

6. The **Effective Date** field defaults to the current system date. Update this date as needed.
7. Select the **“Layoff”** option using the **Action** field drop-down button.

**HR351\_Managing the Layoff Process**

8. Select the applicable reason in the **Reason** field using the drop-down button. The following options are available for selection:
  - a. Layoff Benefits Only
  - b. Layoff Sev and Ben
  - c. Layoff Severance Only
  - d. Layoff TWFR Unpaid
  
9. Press the **TAB** key.

The **Job Data** page refreshes.



The screenshot displays the 'Work Location Details' form for an employee. Key fields include:

- Effective Date:** 04/01/2022
- Effective Sequence:** 0
- HR Status:** Active
- Payroll Status:** Suspended
- \*Action:** Layoff
- Reason:** Layoff TWFR Unpaid
- \*Job Indicator:** Primary Job
- Position Number:** CJS00435 (Admin and Office Spec III)
- Position Entry Date:** 11/29/2021
- Regulatory Region:** USA (United States)
- Company:** CJS (Dept of Criminal Justice Svcs)
- Business Unit:** 14000 (Dept of Criminal Justice Svcs)
- Department:** 10630 (Customer Service Criminal Hist)
- Department Entry Date:** 11/29/2021
- Location:** CENTR (Dept of Criminal Justice Serv.)
- Establishment ID:** DCJS (Dept of Criminal Justice Serv.)
- Date Created:** 09/09/2022
- Last Start Date:** 11/29/2021
- Termination Date:** 03/31/2022
- Expected Job End Date:** (empty)
- Expected Return Date:** (empty)
- Last Date Worked:** 03/31/2022
- STD Claim Number:** (empty)
- Layoff Notice Date:** (empty)
- Recall Eligibility Flag:** (unchecked)
- Turn Off Auto Pay:** No (selected)

Navigation buttons at the bottom include: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, and Update/D.

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**HR351\_Managing the Layoff Process**

10. The **HR Status** and **Payroll Status** fields automatically update after the **Action** and **Reason** fields are selected. Validate the **HR Status** field displays “**Active**” and the **Payroll Status** field displays “**Suspended**”.
11. Enter the **Layoff Notice Date** as the date in which the first notice of layoff was issued to the employee.  
**Note:** This documents the date the initial notice was provided to the employee.
12. Click the **Recall Eligibility Flag** checkbox at the bottom of the page. There are very few instances in which this checkbox will not be selected.
13. Click the **Save** button.
14. To run the **Employee Activity Report** for the employee, use the following navigation:  
**Menu > Workforce Administration > Job Information > Reports > Employee Activity Report**
15. Print the report and place the printed transaction in the employee file for future audit purposes.
16. To run the **Layoff Employee Eligible for Recall Agency Report**, use the following navigation:  
**Menu > Workforce Administration > Job Information > Layoff Employee Eligible For Recall**  
**Note:** Termination of recall rights can be entered at any time during the layoff process, per DHRM policy.

**TWFR – Reduce Hours**

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

**Menu > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.

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

**Search Criteria**

Empl ID	begins with	<input type="text"/>
Empl Record	=	<input type="text"/>
Name	begins with	<input type="text"/>
Last Name	begins with	<input type="text"/>
Second Last Name	begins with	<input type="text"/>
Alternate Character Name	begins with	<input type="text"/>
Middle Name	begins with	<input type="text"/>

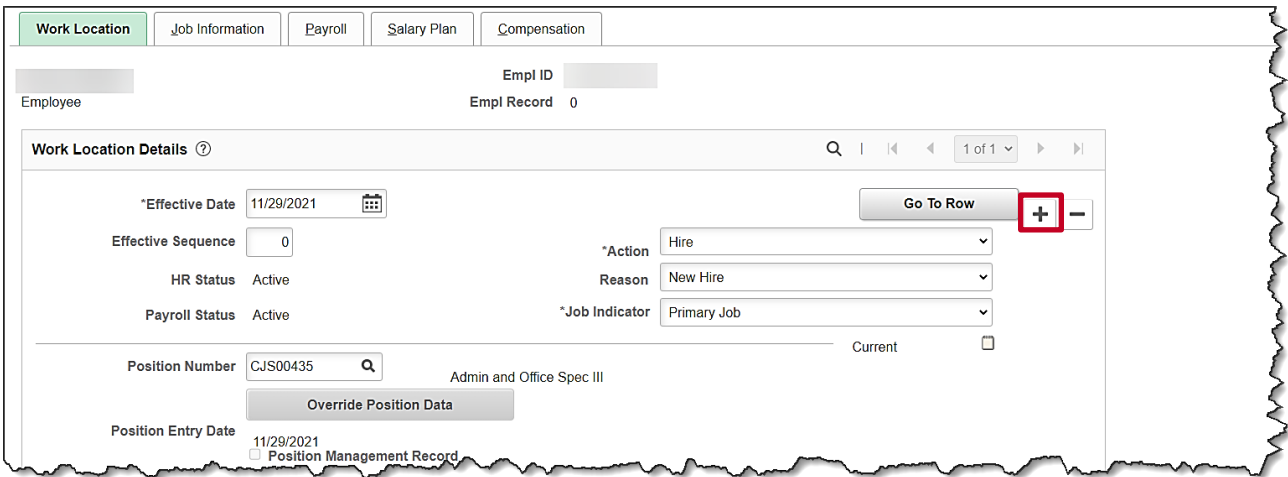
**Include History**    Correct History    Case Sensitive

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

[Basic Search](#)

2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.
3. Click the **Include History** checkbox.
4. Click the **Search** button.

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



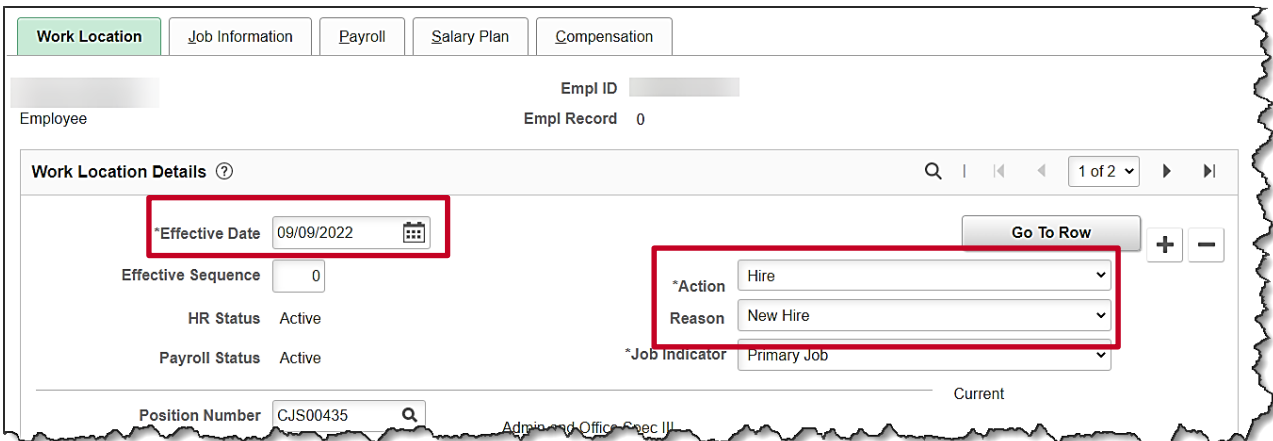
The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section contains the following fields:

- \*Effective Date: 11/29/2021
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Action: Hire
- Reason: New Hire
- \*Job Indicator: Primary Job
- Position Number: CJS00435 (Admin and Office Spec III)
- Position Entry Date: 11/29/2021

The 'Go To Row' button has a red box around the '+' icon.

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

The **Job Data** page refreshes with a new effective dated row displayed.



The screenshot shows the 'Work Location Details' section with two rows. The new row has the following fields:

- \*Effective Date: 09/09/2022
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Action: Hire
- Reason: New Hire
- \*Job Indicator: Primary Job

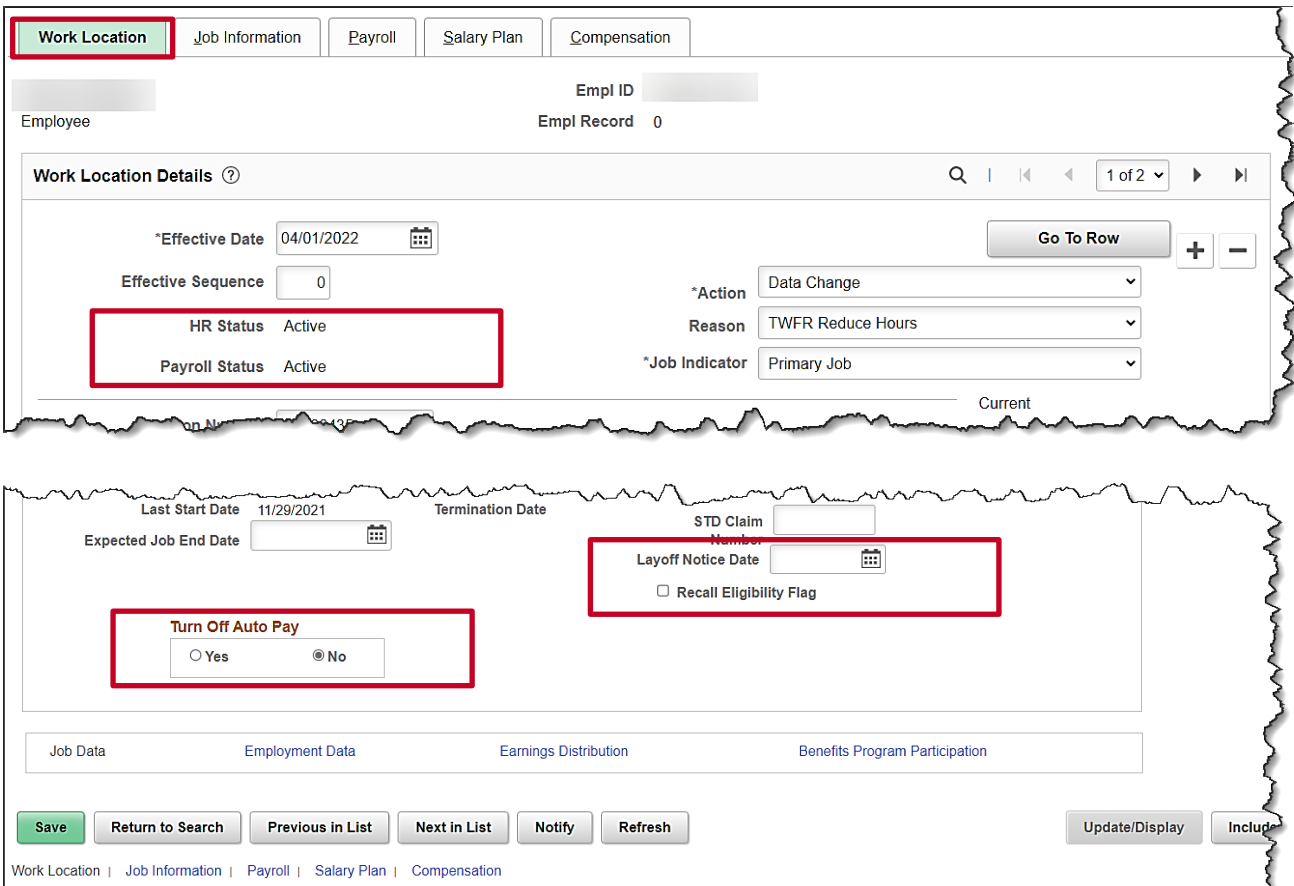
Red boxes highlight the new effective date field and the 'Action' and 'Reason' dropdown menus.

**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row.

6. The **Effective Date** field defaults to the current system date. Update this date as needed.
7. Select the **"Data Change"** option using the **Action** field drop-down button.
8. Select the **"TWFR Reduce Hours"** option using the **Reason** field drop-down button.
9. Press the **TAB** key.



The **Job Data** page refreshes.

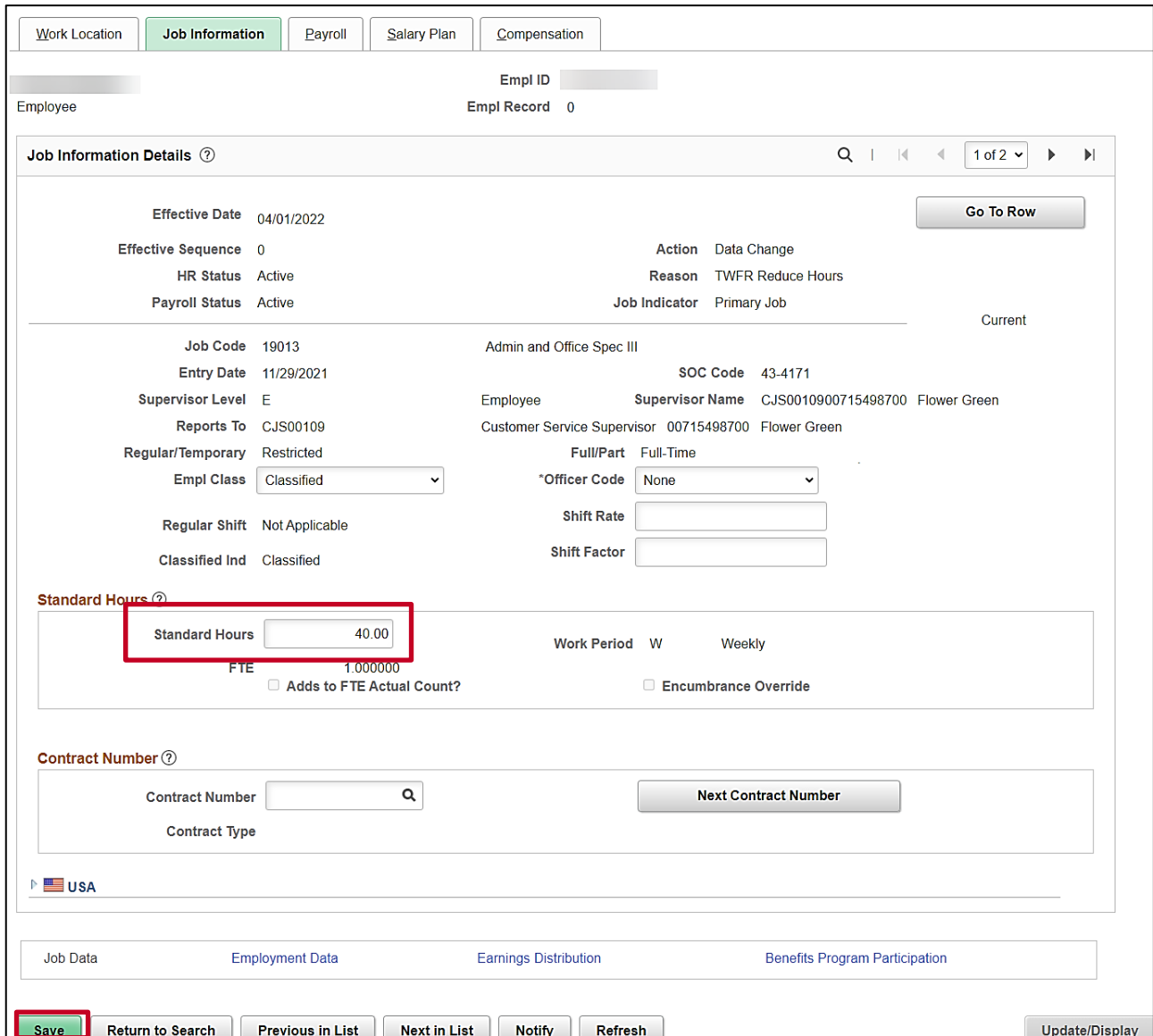


The screenshot displays the 'Work Location' page with the following details:

- Navigation Tabs:** Work Location (highlighted), Job Information, Payroll, Salary Plan, Compensation.
- Employee Info:** Empl ID [redacted], Employee [redacted], Empl Record 0.
- Work Location Details:**
  - \*Effective Date: 04/01/2022
  - Effective Sequence: 0
  - HR Status: Active (highlighted)
  - Payroll Status: Active (highlighted)
  - \*Action: Data Change
  - Reason: TWFR Reduce Hours
  - \*Job Indicator: Primary Job
- Additional Fields:**
  - Last Start Date: 11/29/2021
  - Termination Date: [redacted]
  - Expected Job End Date: [redacted]
  - STD Claim Number: [redacted]
  - Layoff Notice Date: [redacted] (highlighted)
  - Recall Eligibility Flag:
  - Turn Off Auto Pay:  Yes,  No (highlighted)
- Bottom Navigation:** Job Data, Employment Data, Earnings Distribution, Benefits Program Participation.
- Buttons:** Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Update/Display, Include.

10. The **HR Status** and **Payroll Status** fields automatically update after the **Action** and **Reason** fields are selected. Validate the HR and Payroll statuses both display as “**Active**”.
11. Scroll to the bottom of the **Work Location** page.
12. Enter the **Layoff Notice Date** as the date in which the first notice of layoff was issued to the employee.  
**Note:** This documents the date the initial notice was provided to the employee.
13. Select the **Recall Eligibility Flag** checkbox. There are very few instances in which this checkbox is not selected.
14. Change the **Turn Off Auto Pay** radio button to **Yes**.  
**Note:** The employee will be paid hours due out of the SPOT tool. Work with the Payroll Departments to calculate the compensation due the employee.
15. Click the **Job Information** tab.

The **Job Information** tab displays.



The screenshot shows the 'Job Information' tab in a web application. At the top, there are tabs for 'Work Location', 'Job Information' (selected), 'Payroll', 'Salary Plan', and 'Compensation'. Below the tabs, there are fields for 'Empl ID' and 'Empl Record'. The main section is titled 'Job Information Details' and contains various fields for employee information, including 'Effective Date', 'HR Status', 'Job Code', 'Entry Date', 'Supervisor Level', 'Reports To', 'Regular/Temporary', 'Empl Class', 'Regular Shift', 'Classified Ind', 'Action', 'Reason', 'Job Indicator', 'SOC Code', 'Supervisor Name', 'Customer Service Supervisor', 'Full/Part', 'Officer Code', 'Shift Rate', and 'Shift Factor'. A 'Standard Hours' section is highlighted with a red box, showing 'Standard Hours' set to 40.00, 'Work Period' as 'W Weekly', and 'FTE' as 1.000000. Below this is a 'Contract Number' section with a search field and a 'Next Contract Number' button. At the bottom, there are navigation buttons: 'Save' (highlighted with a red box), 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', and 'Update/Display'.

16. Enter the new standard hours for the employee, as defined in the TWFR Reduction Agreement, in the **Standard Hours** field.
17. Press the **TAB** key. The remaining fields within the **Standard Hours** section update as applicable based on the new standard hours; review as needed.
18. Click the **Save** button.
19. To run the **Employee Activity Report** for the employee, use the following navigation:  
**Menu > Workforce Administration > Job Information > Reports > Employee Activity Report**
20. Run the **Employee Activity Report** for the employee.
21. Print the report and place the printed transaction in the employee file for future audit requests.

**TWFR – Not Working**

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

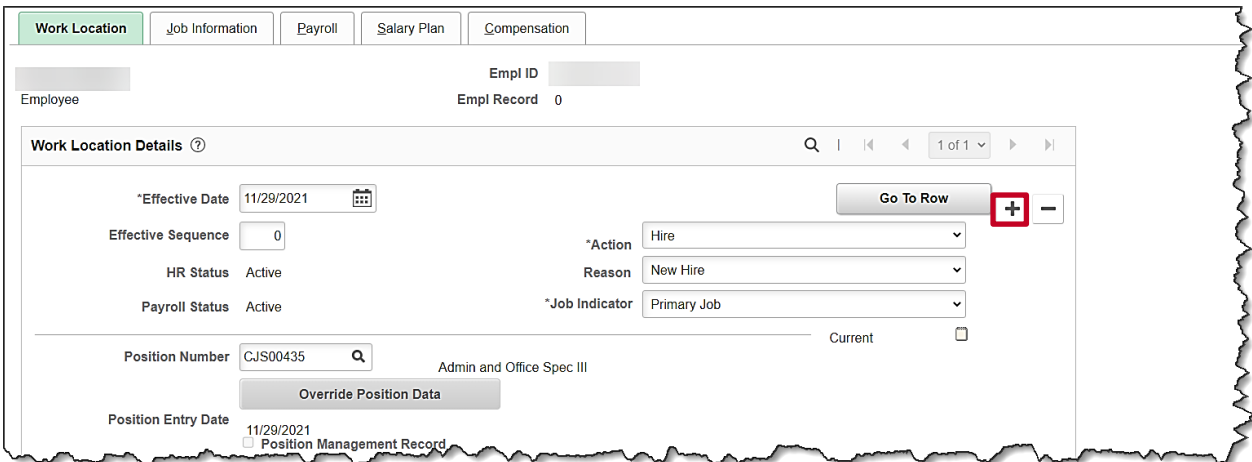
**Menu > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.

**Job Data**  
Enter any information you have and click Search. Leave fields blank for a list of all values.  
[Find an Existing Value](#)  
▼ **Search Criteria**  
Empl ID begins with   
Empl Record =   
Name begins with   
Last Name begins with   
Second Last Name begins with   
Alternate Character Name begins with   
Middle Name begins with   
 **Include History**  Correct History  Case Sensitive  
Limit the number of results to (up to 300):   
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.
3. Click the **Include History** checkbox.
4. Click the **Search** button.

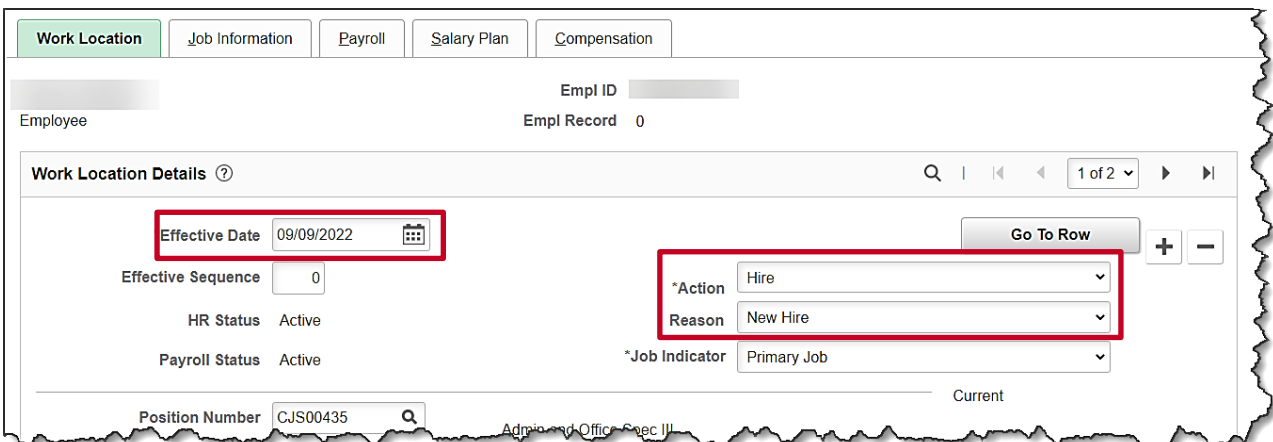
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section includes fields for \*Effective Date (11/29/2021), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Position Number (CJS00435), and Position Entry Date (11/29/2021). The \*Action dropdown is set to 'Hire', Reason to 'New Hire', and \*Job Indicator to 'Primary Job'. A 'Go To Row' button with a red '+' icon is highlighted.

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

The **Job Data** page refreshes with a new effective dated row displayed.

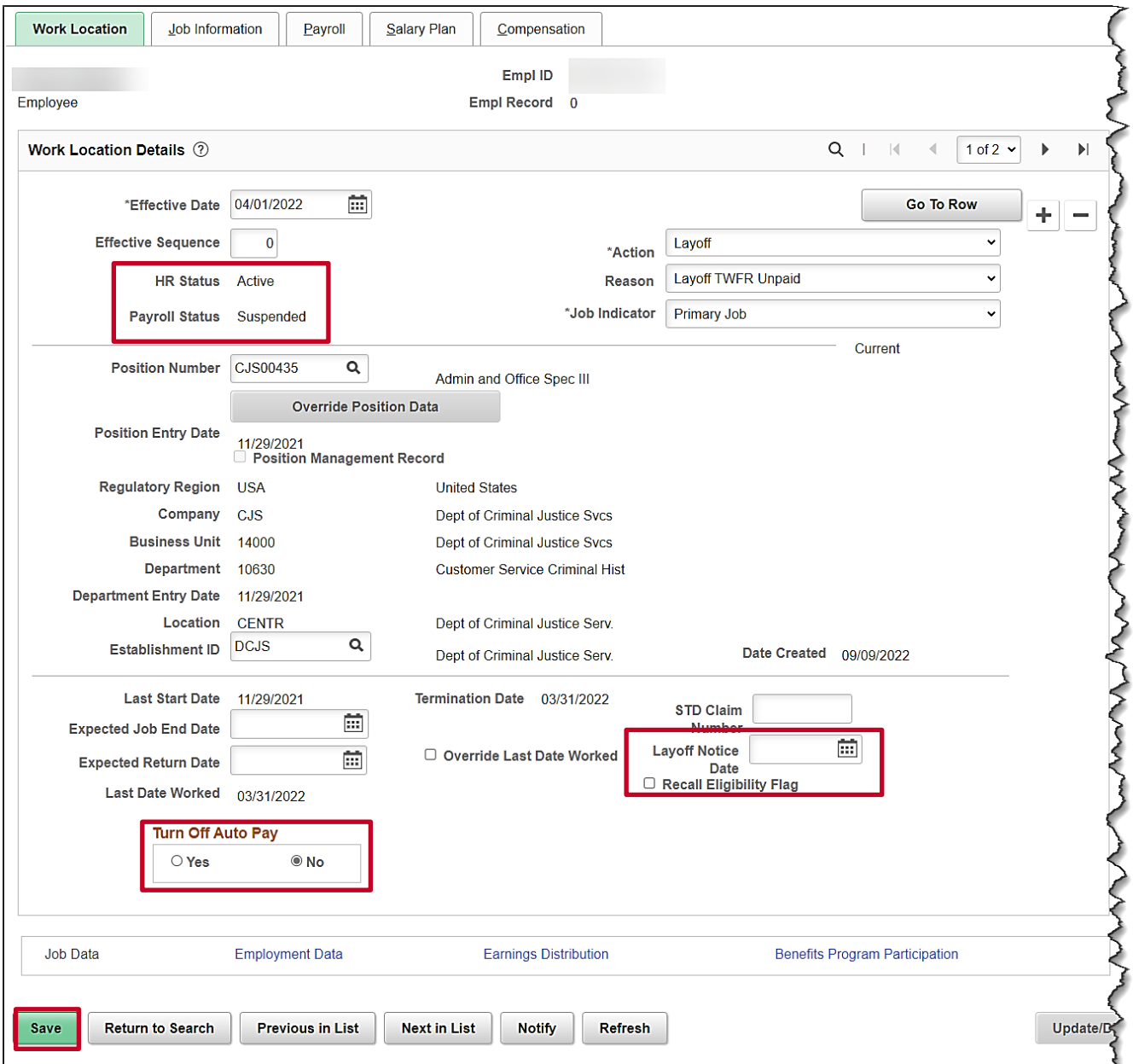


The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section now displays two rows. The first row has \*Effective Date 09/09/2022, Effective Sequence 0, HR Status Active, Payroll Status Active, Position Number CJS00435, and Position Entry Date 11/29/2021. The second row has \*Effective Date 09/09/2022, Effective Sequence 0, HR Status Active, Payroll Status Active, Position Number CJS00435, and Position Entry Date 11/29/2021. The \*Action dropdown is set to 'Layoff', Reason to 'Layoff TWFR Unpaid', and \*Job Indicator to 'Primary Job'. A 'Go To Row' button with a red '+' icon is highlighted.

**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row.

6. The **Effective Date** field defaults to the current system date. Update this date as needed.
7. Select the “**Layoff**” option using the **Action** field drop-down button.
8. Select the “**Layoff TWFR Unpaid**” option using the **Reason** field drop-down button.
9. Press the **TAB** key.

The **Job Data** page refreshes.



The screenshot displays the 'Work Location Details' page for an employee. The page is organized into several sections:

- Work Location Details:** Includes fields for \*Effective Date (04/01/2022), Effective Sequence (0), HR Status (Active), Payroll Status (Suspended), \*Action (Layoff), Reason (Layoff TWFR Unpaid), and \*Job Indicator (Primary Job).
- Position Information:** Includes Position Number (CJS00435), Position Entry Date (11/29/2021), Regulatory Region (USA), Company (CJS), Business Unit (14000), Department (10630), Location (CENTR), and Establishment ID (DCJS).
- Termination/Notice Information:** Includes Last Start Date (11/29/2021), Termination Date (03/31/2022), Expected Job End Date, Expected Return Date, Last Date Worked (03/31/2022), STD Claim Number, Layoff Notice Date, and Recall Eligibility Flag.
- Turn Off Auto Pay:** Radio buttons for Yes and No (selected).

The 'Save' button is highlighted in red.

10. The **HR Status** and **Payroll Status** fields automatically update after the **Action** and **Reason** fields are selected. Validate the **HR Status** field displays as “**Active**” and the **Payroll Status** field displays as “**Suspended**”.
11. Enter the **Layoff Notice Date** as the date in which the first notice of layoff was issued to the employee.  
**Note:** This documents the date the initial notice was provided to the employee.
12. Select the **Recall Eligibility Flag** checkbox. There are very few instances in which this checkbox is not selected.

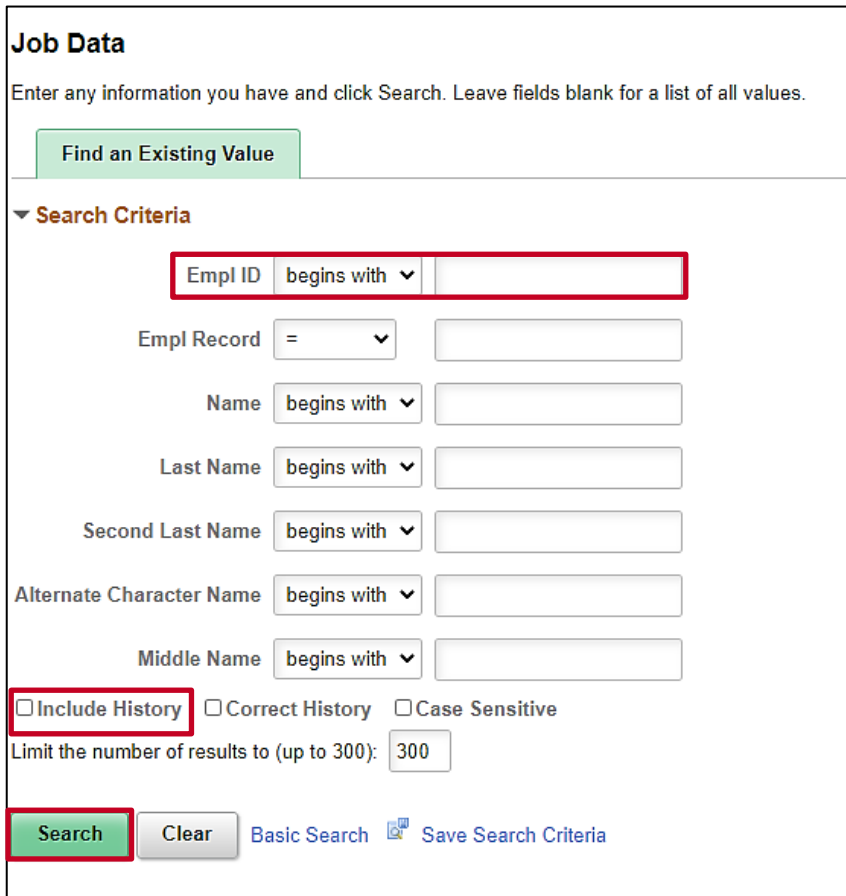
13. Change the **Turn Off Auto Pay** radio button to **Yes**.
14. Click the **Save** button.
15. To run the Employee Activity Report for the employee, use the following navigation:  
**Menu > Workforce Administration > Job Information > Reports > Employee Activity Report**
16. Run the **Employee Activity Report** for the employee.
17. Print the report and place the printed transaction in the employee file for future audit requests.

**Recall from Layoff**

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

**Menu > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.



**Job Data**

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

[Find an Existing Value](#)

▼ **Search Criteria**

**Empl ID** begins with ▼

Empl Record = ▼

Name begins with ▼

Last Name begins with ▼

Second Last Name begins with ▼

Alternate Character Name begins with ▼

Middle Name begins with ▼

**Include History**  Correct History  Case Sensitive

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

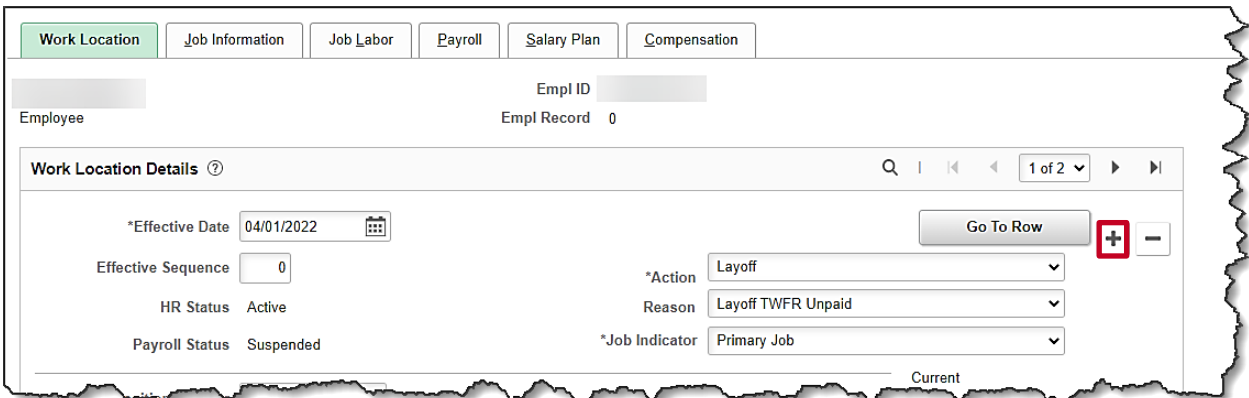
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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

3. Click the **Include History** checkbox.

4. Click the **Search** button.

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



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

Employee: Michele Wills637 | Empl ID: 08188741300 | Empl Record: 0

Work Location Details (1 of 2)

\*Effective Date: 04/01/2022 | Go To Row | + -

Effective Sequence: 0 | \*Action: Layoff

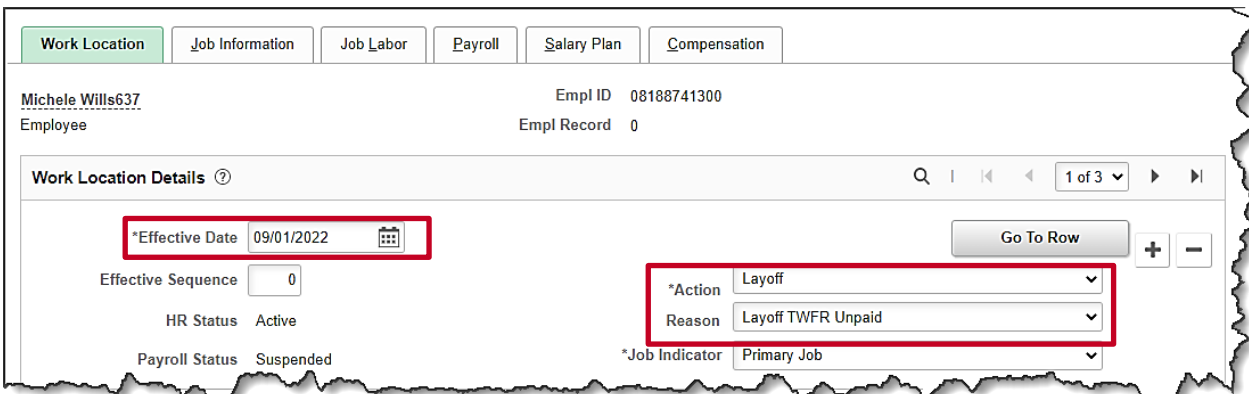
HR Status: Active | Reason: Layoff TWFR Unpaid

Payroll Status: Suspended | \*Job Indicator: Primary Job

Current

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

The **Job Data** page refreshes with a new effective dated row displayed.



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

Employee: Michele Wills637 | Empl ID: 08188741300 | Empl Record: 0

Work Location Details (1 of 3)

\*Effective Date: 09/01/2022 | Go To Row | + -

Effective Sequence: 0 | \*Action: Layoff

HR Status: Active | Reason: Layoff TWFR Unpaid

Payroll Status: Suspended | \*Job Indicator: Primary Job

6. The **Effective Date** field defaults to the current system date. Update this date as needed.

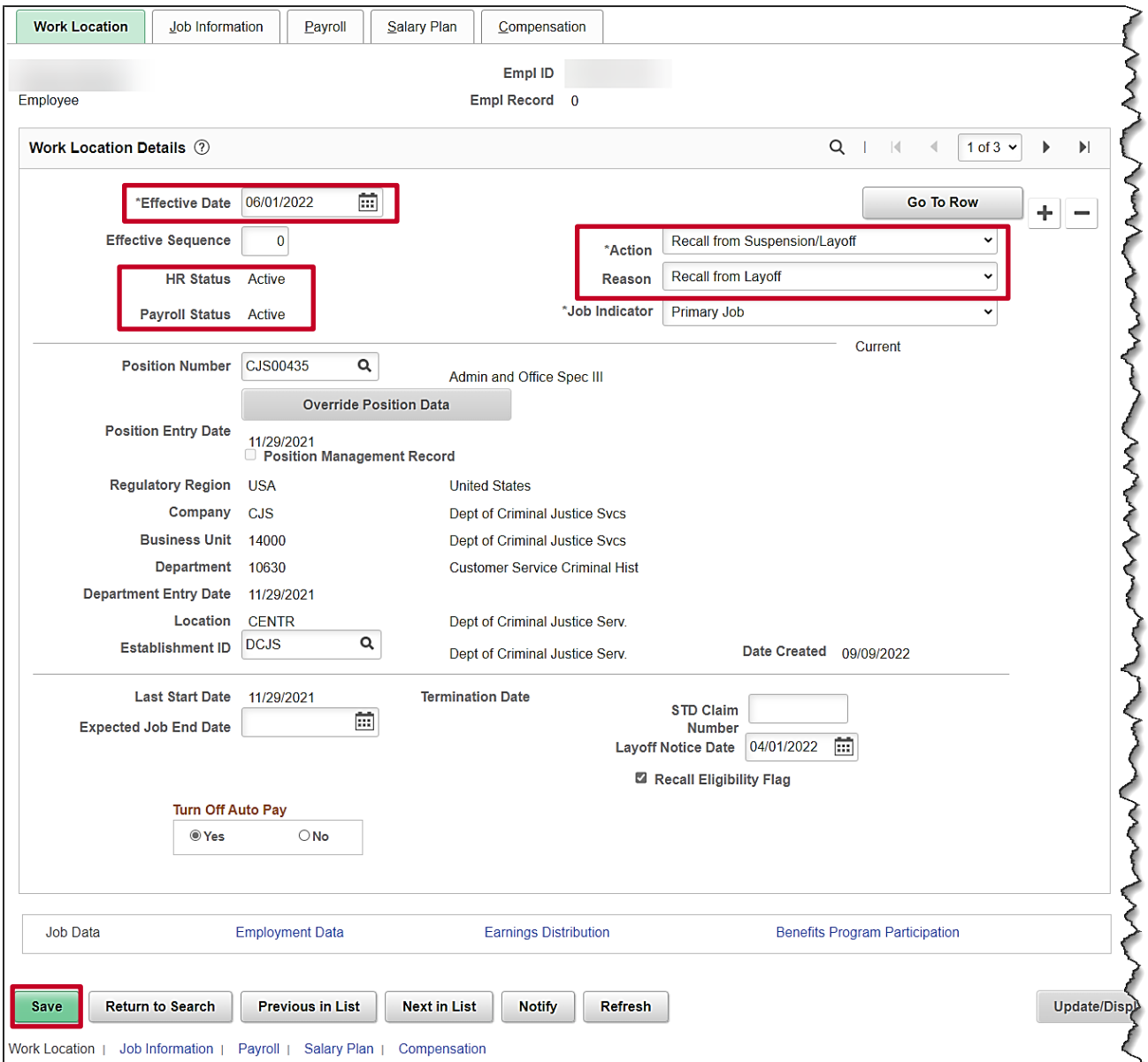
7. Select the “**Recall from Suspension/Layoff**” option using the **Action** field drop-down button.

8. Select the applicable option using the **Reason** field drop-down button.

9. Press the **TAB** key.



The **Job Data** page refreshes.



The screenshot shows the 'Work Location Details' form in a web application. The form is divided into several sections:

- Top Section:** Includes 'Effective Date' (06/01/2022), 'Effective Sequence' (0), 'HR Status' (Active), 'Payroll Status' (Active), '\*Action' (Recall from Suspension/Layoff), 'Reason' (Recall from Layoff), and '\*Job Indicator' (Primary Job). A 'Go To Row' button is also present.
- Position Information:** Includes 'Position Number' (CJS00435), 'Position Entry Date' (11/29/2021), 'Regulatory Region' (USA), 'Company' (CJS), 'Business Unit' (14000), 'Department' (10630), 'Department Entry Date' (11/29/2021), 'Location' (CENTR), and 'Establishment ID' (DCJS).
- Termination and Notice:** Includes 'Last Start Date' (11/29/2021), 'Termination Date', 'STD Claim Number', 'Layoff Notice Date' (04/01/2022), and a checked 'Recall Eligibility Flag'.
- Turn Off Auto Pay:** A radio button section with 'Yes' selected.
- Bottom Section:** Includes a 'Save' button (highlighted with a red box), 'Return to Search', 'Previous in List', 'Next in List', 'Notify', 'Refresh', and 'Update/Disp' buttons.

10. The **HR Status** and **Payroll Status** fields automatically update after the **Action** and **Reason** fields are selected. Validate the HR and Payroll statuses both display as “**Active**”.
11. Delete the value entered within the **Layoff Notice Date** field, as applicable.
12. De-select the **Recall Eligibility Flag** checkbox, as applicable.
13. Change the **Turn Off Auto Pay** radio button to **No** if it was previously changed to **Yes** during the TWFR Reduced Hours or TWFR Unpaid process.
14. Click the **Save** button.

15. To run the **Employee Activity Report** for the employee, use the following navigation:  
**Menu > Workforce Administration > Job Information > Reports > Employee Activity Report**
16. Run the **Employee Activity Report** for the employee.
17. Print the report and place the printed transaction in the employee file for future audit requests.
18. To run the **Layoff Employee Eligible for Recall Agency Report**, use the following navigation:  
**Menu > Workforce Administration > Job Information > Layoff Employee Eligible For Recall**  
**Note:** Termination of recall rights can be entered at any time during the layoff process, per the DHRM policy.