

**Separation Statuses Overview**

The Separate Employee business process captures an employee's departure from an Agency and, in some instances, the end of state service. Separation may be classified as voluntary (e.g., retirement, resignation) or involuntary (e.g., disciplinary action, Temporary Workforce Reduction (TWFR), layoff). This business process is applicable to both state Agencies and localities in The Local Choice (TLC) program. The Layoff Process will not be covered in this Job Aid. For further information on the Layoff Process, see the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The employee, Agency head, Supervisor, or Legislation can initiate communication to the appropriate Agency HR staff for a separation. The type of separation determines the required documentation that should be submitted to the Agency HR. The Agency must utilize Agency-specific systems or paper forms to route requests through Agency external approval process before entering the separation into Cardinal.

Prior to beginning this process, review the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The two types of **Separations** covered in this Job Aid are:

**Involuntary**

- Standards of Conduct
- Unsatisfactory Performance during Probationary Period
- Inability to Perform Duties

**Voluntary**

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

Action/Action Reasons are used to reflect the type of separation. In Cardinal, both Voluntary and Involuntary Separations use the Action of "Termination" or "Retirement"; HR staff must reference the applicable Action Reason to identify the correct cause of separation.

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

- Benefit status is updated in Cardinal Benefits (BN) and COBRA eligibility is triggered if applicable
- Time Reporter is updated for Cardinal TA. Productive and Non-productive time can still be entered and approved prior to the effective date of the Separation. The updated HR status will stop leave accruals
- The updated Payroll status will prevent a paysheet from being created for the employee



Separation Statuses Overview (continued)

Agency HR must coordinate with Agency Payroll and Agency Benefits Administrator (BA) for final pay, (e.g., salary, OT, leave payout) due to the employee. Additional steps may be needed to create a Paysheet in order to make the final payments. If there is a large volume of updates, the Agency can submit a file to be uploaded using the mass upload process. For further information on Mass Updates, see the Job Aid titled Performing a Mass Upload. This Job Aid can be found on the Cardinal website in Job Aids under Learning.

Note: Once Cardinal HCM goes live, any employees terminated within Cardinal HCM from that point forward, will automatically have limited Employee Self-Service (ESS) access for 1.5 years (18 months) after termination (e.g., viewing W-2). Retired employees will also have access to Cardinal. In order for a Terminated or a Retired employee to log into Cardinal, a valid personal email address is required on the Personal Data record in Cardinal.

Note: For Separations related to Involuntary terminations, refer to DHRM Policy 1.45 and 1.60.

Note: For Separations related to terminating an employee once Severance benefits end, refer to DHRM 1.57.

Note: For Separations related to Long Term Disability, refer to DHRM Policy 4.57.

When terminating an employee, the Agency BA will need to process the termination of benefit elections for the Terminated employee. See the Job Aid titled BN361 Managing Terminations and Transfers for more details. This Job Aid is located on the Cardinal website in Job Aids under Learning.

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

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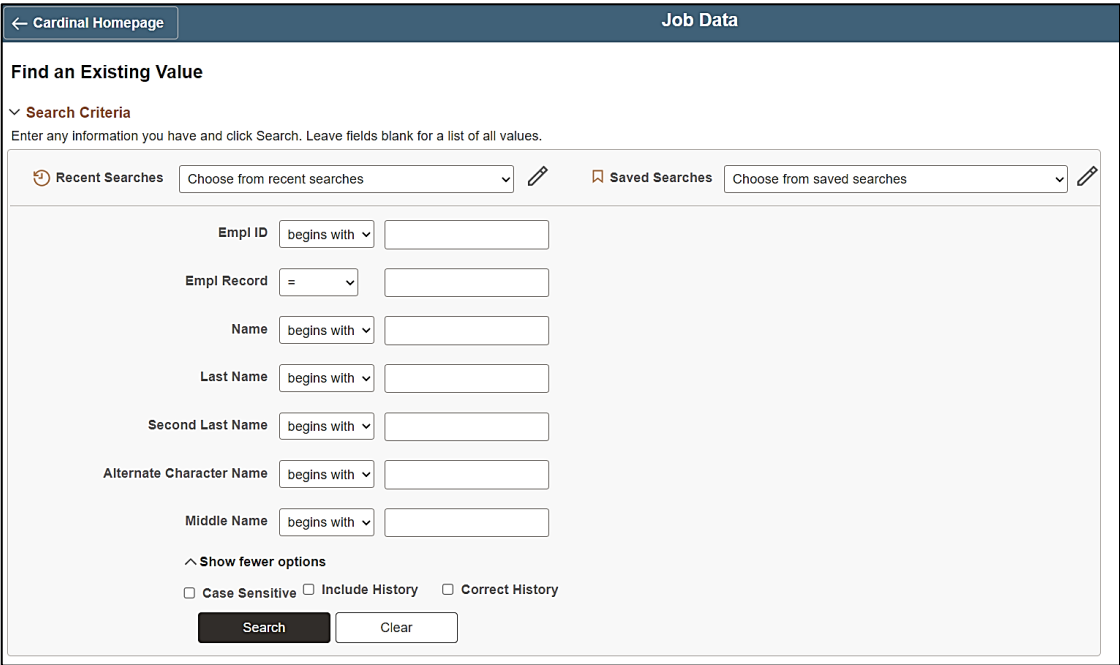



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### Revision History

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

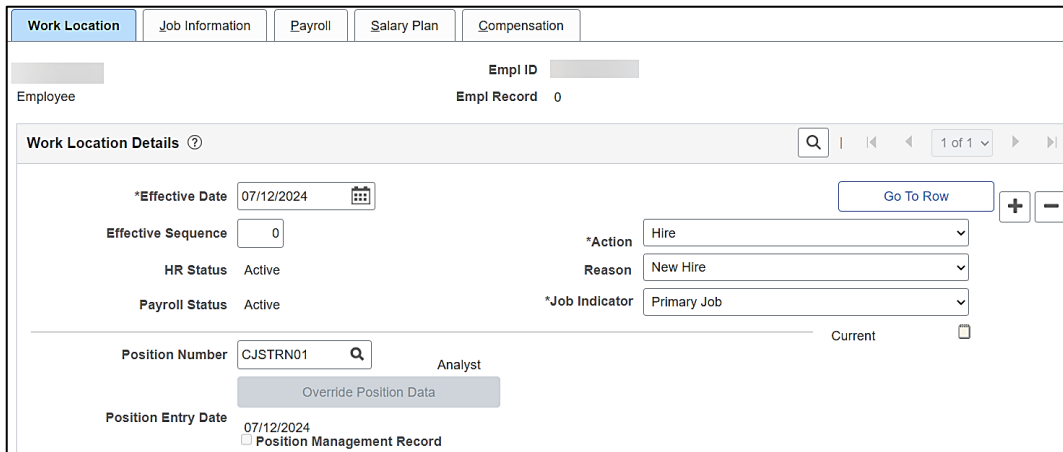
### Termination - Voluntary


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



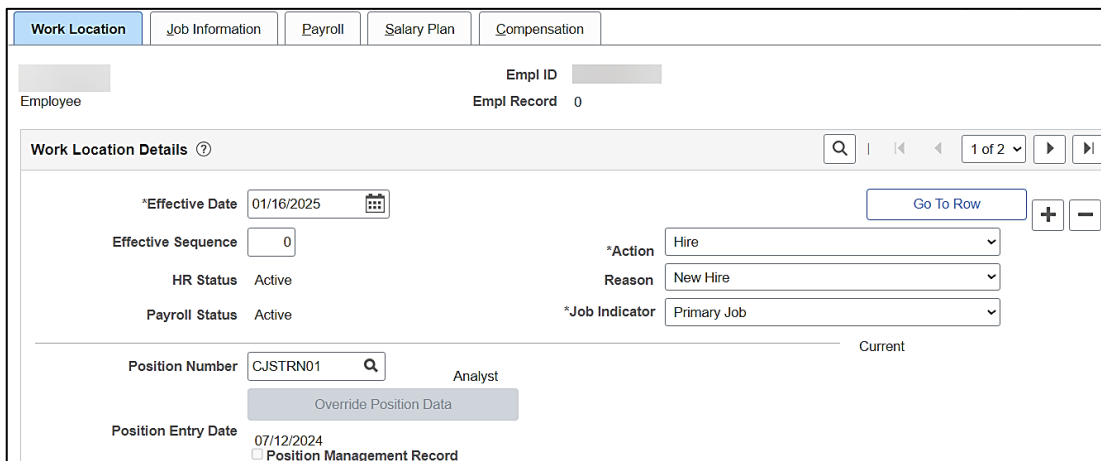
| Step | Action  |
|------|---|
| 4.   | Click the <b>Search</b> button.<br> |

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









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

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



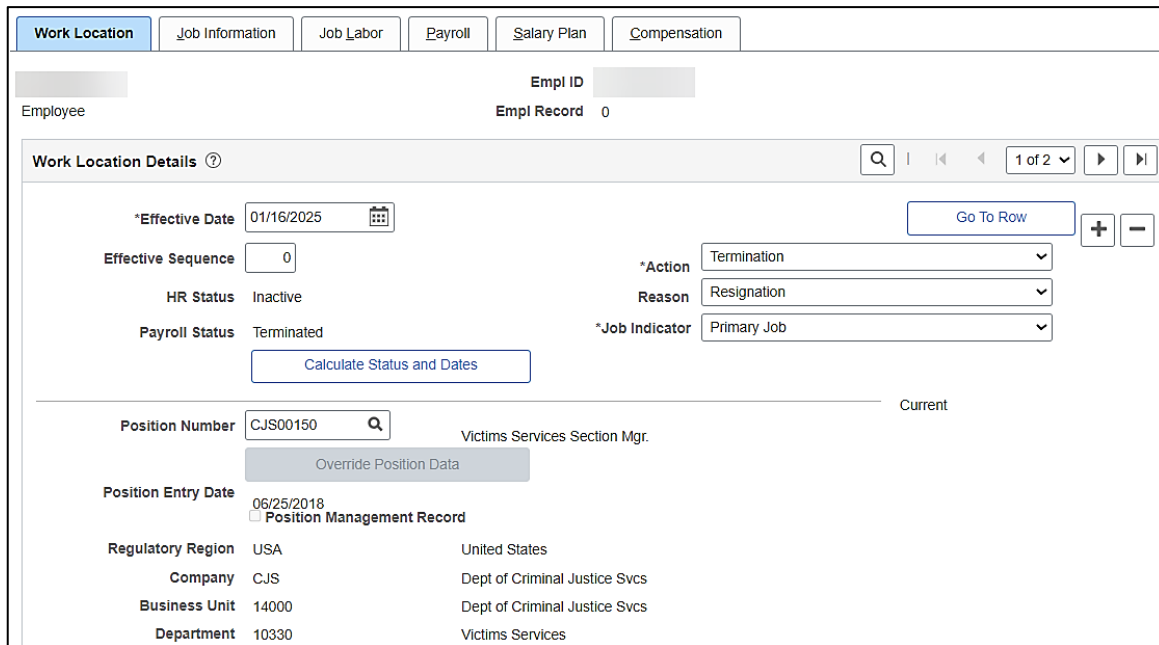


| Step  | Action   |
|---|--|
|    | <p>When a new row is created, the row count increases by one and the <b>Effective Date</b> field displays the current date.</p>  |
| 6.  | <p>Update the effective date as needed using the <b>Effective Date Calendar</b> icon.</p> <div data-bbox="293 548 805 632" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <span style="border: 1px solid red; padding: 2px;">01/16/2025</span> </p> </div>  |
|    | <p>Set the effective date to be one day after the employee’s last day worked. The effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee’s last day on the payroll).</p> <p>If an employee’s last day is “1/15/2025”, the effective date of the termination should be “1/16/2025”. For further information on effective dating, see the Job Aid titled <b>HR351 Overview of Effective Dating</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>  |
| 7.  | <p>Click the <b>Action</b> field dropdown button and select “Termination”.</p> <div data-bbox="293 1003 1373 1125" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <span style="border: 1px solid black; padding: 2px;">01/16/2025</span>  <span style="float: right;">Go To Row <span style="border: 1px solid black; padding: 2px;">+</span> <span style="border: 1px solid black; padding: 2px;">-</span></span></p> <p>Effective Sequence <span style="border: 1px solid black; padding: 2px;">0</span> *Action <span style="border: 1px solid red; padding: 2px;">Termination</span> <span style="float: right;">+</span> <span style="border: 1px solid black; padding: 2px;">-</span></p> <p>HR Status Inactive Reason <span style="border: 1px solid black; padding: 2px;">[Dropdown]</span></p> </div>          |
| 8.  | <p>Click the <b>Reason</b> field dropdown button and select the applicable reason.</p> <div data-bbox="293 1213 1373 1335" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <span style="border: 1px solid black; padding: 2px;">01/16/2025</span>  <span style="float: right;">Go To Row <span style="border: 1px solid black; padding: 2px;">+</span> <span style="border: 1px solid black; padding: 2px;">-</span></span></p> <p>Effective Sequence <span style="border: 1px solid black; padding: 2px;">0</span> *Action <span style="border: 1px solid black; padding: 2px;">Termination</span> <span style="float: right;">+</span> <span style="border: 1px solid black; padding: 2px;">-</span></p> <p>HR Status Inactive Reason <span style="border: 1px solid red; padding: 2px;">Resignation</span></p> </div> |
|  | <p>There are two Action Reason combinations related to an employee’s death. One is Termination/Death, and the other is Termination/Death with Dependent. The difference between the two events is that the benefits terminate on different dates. When an employee passes away, the Benefit Administrator should review the employee’s current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination.</p> <p>For further information on Action Reasons, see the Job Aid titled <b>HR351 Action Reason Codes</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>  |

| Step | Action |
|------|--------|
|------|--------|


The **Work Location** page refreshes.

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



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

|     |   |
|-----|---|
| 10. | <p>Click the <b>Save</b> button.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px;">Save</div> <div style="padding: 2px 10px;">Return to Search</div> <div style="padding: 2px 10px;">Notify</div> <div style="padding: 2px 10px;">Refresh</div> </div> </div> |
|-----|---|

|   |  |
|---|--|
|  | <p>If a Termination Action Reason of “Death” or “Death with Dependent” is selected, the death date on the employee’s Personal Record is updated, and the <b>Death Warning Message</b> displays in a pop-up window.</p> <div style="border: 2px solid red; padding: 10px; margin: 10px 0;"> <p>Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)</p> <p>Date of Death on personal data gets updated for the current transaction.</p> <div style="display: flex; justify-content: center; gap: 20px;"> <div style="border: 1px solid gray; padding: 5px 15px;">OK</div> <div style="border: 1px solid gray; padding: 5px 15px;">Cancel</div> </div> </div> |
|---|--|

| Step | Action   |
|------|--|
| 11.  | <p>Click the <b>OK</b> button.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)</p> <p>Date of Death on personal data gets updated for the current transaction.</p> <p style="text-align: center;"> <input style="border: 2px solid red;" type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div> |

The **Work Location** page redispays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee Empl ID  

Empl Record 0

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

\*Effective Date  Go To Row

Effective Sequence  \*Action

HR Status Inactive Reason

Payroll Status Terminated \*Job Indicator

Position Number  Victims Services Section Mgr.

Override Position Data

Position Entry Date   Position Management Record

Regulatory Region USA United States

Company CJS Dept of Criminal Justice Svcs

Business Unit 14000 Dept of Criminal Justice Svcs

Department 10330 Victims Services

Department Entry Date 05/14/2012

Location CENT1 Washington Building

Establishment ID  Dept of Criminal Justice Serv. Date Created 01/31/2025

Last Start Date 05/14/2012 Termination Date 01/15/2025

STD Claim Number

Override Last Date Worked Layoff Notice Date

Last Date Worked 01/15/2025  Recall Eligibility Flag

**Turn Off Auto Pay**

Yes  No



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

|     |  |
|-----|--|
| 12. | <p>Navigate to the <b>Modify a Person</b> page using the following navigation:</p> <p><b>NavBar &gt; Menu &gt; Workforce Administration &gt; Personal Information &gt; Modify a Person</b></p> |
|-----|--|



| Step | Action |
|------|--------|
|------|--------|

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

Biographical Details | Contact Information | Regional | VA Person Info

Person ID [Redacted]

Name [Redacted] | 1 of 1 | View All

Effective Date 09/23/2022 | + -

Format Type English

Display Name [Redacted] | View Name

**Biographic Information**

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

Date of Death [Redacted]

Birth Country USA | United States

Birth State [Redacted]

Birth Location [Redacted] |  Exclude Contact Information?

**Biographical History**

\*Effective Date 09/23/2022 | + -

\*Gender Female

\*Highest Education Level Masters Level Degree

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

Language Code [Redacted]

Alternate ID [Redacted]

Full-Time Student

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

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



| Step | Action |
|------|--------|
|------|--------|

The **Contact Information** page displays.

Biographical Details
Contact Information
Regional
VA Person Info

██████████
Empl ID ██████████

**Current Addresses**

🗨️ 🔍
1-1 of 1
View All

| Address Type | As Of Date | Status | Address  |                                     |     |
|--------------|------------|--------|--|-------------------------------------|-----|
| Home         | 03/24/2022 | A      | 100 MAIN ST<br>RICHMOND, VA 99999<br>Prince George | <a href="#">View Address Detail</a> | + - |

**Phone Information**

🗨️ 🔍
1-3 of 3
View All

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

**Email Option Selection**

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

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

**Email Addresses**

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

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

**Email Option Selection**

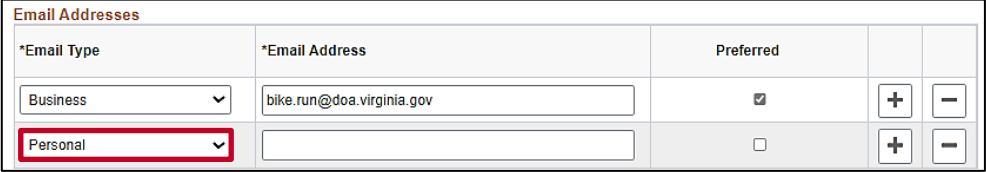
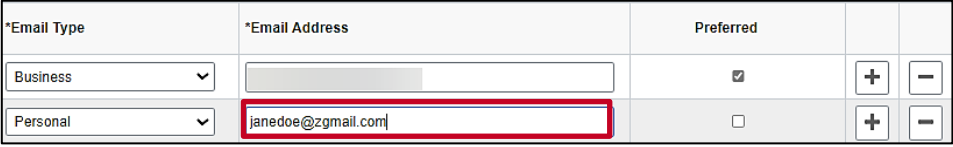
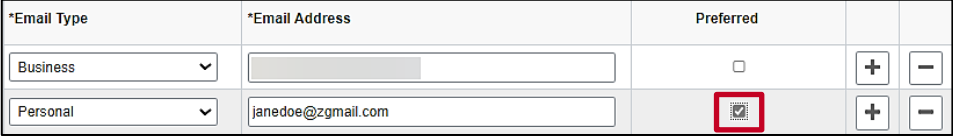
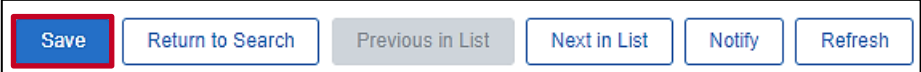
Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

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

**Email Addresses**

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



| Step        | Action  |                                     |                  |                  |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
|-------------|---|-------------------------------------|------------------|------------------|--------------|--------|----------|---------------------------|-------------------------------------|---|---|----------|--------------------|-------------------------------------|---|---|
| 16.         | <p>Click the <b>Email Type</b> dropdown button and select “Personal”.</p>  <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>bike.run@doa.virginia.gov</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table> | *Email Type                         | *Email Address   | Preferred        |              |        | Business | bike.run@doa.virginia.gov | <input checked="" type="checkbox"/> | + | - | Personal |                    | <input type="checkbox"/>            | + | - |
| *Email Type | *Email Address  | Preferred                           |                  |                  |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| Business    | bike.run@doa.virginia.gov   | <input checked="" type="checkbox"/> | +                | -                |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| Personal    |   | <input type="checkbox"/>            | +                | -                |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| 17.         | <p>Enter the personal email address in the <b>Email Address</b> field.</p>  <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>       | *Email Type                         | *Email Address   | Preferred        |              |        | Business |                           | <input checked="" type="checkbox"/> | + | - | Personal | janedoe@zgmail.com | <input type="checkbox"/>            | + | - |
| *Email Type | *Email Address  | Preferred                           |                  |                  |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| Business    |   | <input checked="" type="checkbox"/> | +                | -                |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| Personal    | janedoe@zgmail.com  | <input type="checkbox"/>            | +                | -                |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| 18.         | <p>Select the <b>Preferred</b> checkbox option.</p>  <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>                             | *Email Type                         | *Email Address   | Preferred        |              |        | Business |                           | <input type="checkbox"/>            | + | - | Personal | janedoe@zgmail.com | <input checked="" type="checkbox"/> | + | - |
| *Email Type | *Email Address  | Preferred                           |                  |                  |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| Business    |   | <input type="checkbox"/>            | +                | -                |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| Personal    | janedoe@zgmail.com  | <input checked="" type="checkbox"/> | +                | -                |              |        |          |                           |                                     |   |   |          |                    |                                     |   |   |
| 19.         | <p>Click the <b>Save</b> button.</p>  <table border="1"> <tr> <td>Save</td> <td>Return to Search</td> <td>Previous in List</td> <td>Next in List</td> <td>Notify</td> <td>Refresh</td> </tr> </table>   | Save                                | Return to Search | Previous in List | Next in List | Notify | Refresh  |                           |                                     |   |   |          |                    |                                     |   |   |
| Save        | Return to Search  | Previous in List                    | Next in List     | Notify           | Refresh      |        |          |                           |                                     |   |   |          |                    |                                     |   |   |

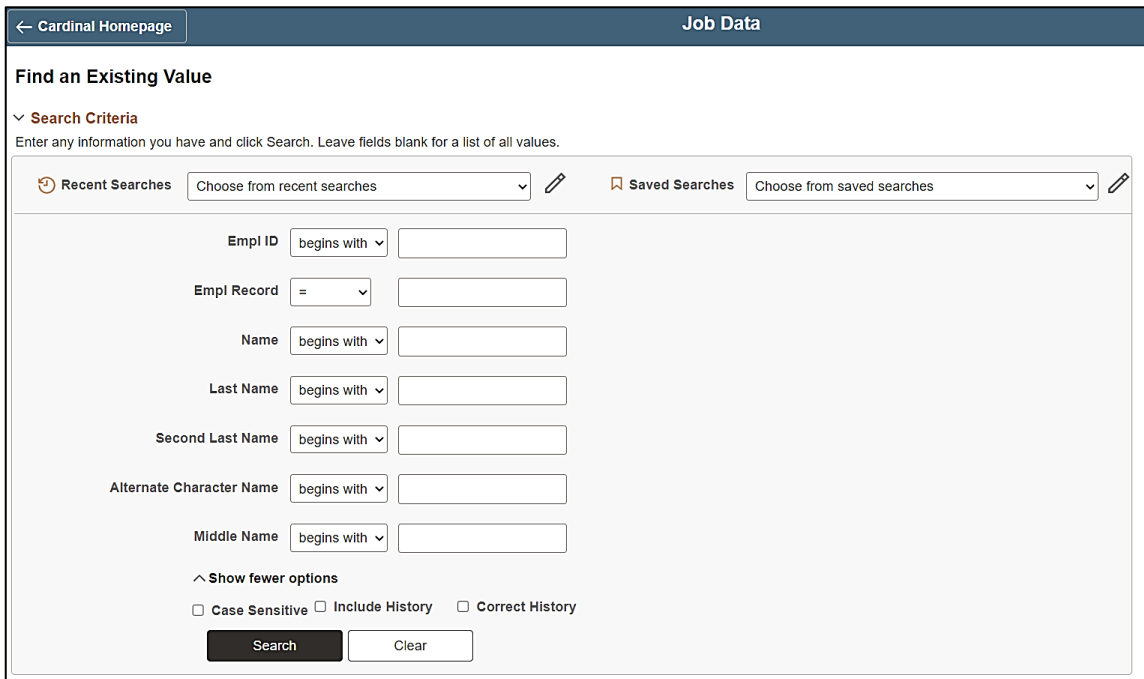


| Step         | Action  |                                     |  |                                     |         |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
|--------------|---|-------------------------------------|--|-------------------------------------|---------|--|--|------|------------|---|--|-------------------------------------|-----|-------------|-----------|-----------|-----------|--|--|----------|--------------|--|-------------------------------------|---|---|--------|--------------|--|--------------------------|---|---|------|--------------|--|--------------------------|---|---|-------------|----------------|-----------|--|--|----------|--------------------|-------------------------------------|---|---|
|              | <p>The <b>Contact Information</b> page refreshes.</p> <div data-bbox="295 432 1341 1390" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> <span>Biographical Details</span> <span style="background-color: #e0e0e0; padding: 2px 5px;">Contact Information</span> <span>Regional</span> <span>VA Person Info</span> </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> <span>██████████</span> <span>Empl ID ██████████</span> </div> <p><b>Current Addresses</b></p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> <span>🗒️ 🔍</span> <span>1-1 of 1</span> <span>View All</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Address Type</th> <th>As Of Date</th> <th>Status</th> <th>Address</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Home</td> <td>03/24/2022</td> <td>A</td> <td>100 MAIN ST<br/>RICHMOND, VA 99999<br/>Prince George</td> <td><a href="#">View Address Detail</a></td> <td style="text-align: center;">+ -</td> </tr> </tbody> </table> <p><b>Phone Information</b></p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> <span>🗒️ 🔍</span> <span>1-3 of 3</span> <span>View All</span> </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>555/555-5555</td> <td></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> <tr> <td>Mobile</td> <td>555/555-5555</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> <tr> <td>Home</td> <td>555/555-5555</td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> <p><b>Email Option Selection</b></p> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <input type="radio"/> Agency Provided Email            <input type="radio"/> Pending Agency Provided Email            <input checked="" type="radio"/> Employee Provided Email       </div> <p style="font-size: small; margin-bottom: 5px;">1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, <b>except</b>:<br/>       2. When no email address is available, select applicable email option and <b>ALWAYS</b> use noemail@virginia.gov</p> <p><b>Email Addresses</b></p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> </div> | Address Type                        | As Of Date   | Status                              | Address |  |  | Home | 03/24/2022 | A | 100 MAIN ST<br>RICHMOND, VA 99999<br>Prince George | <a href="#">View Address Detail</a> | + - | *Phone Type | Telephone | Extension | Preferred |  |  | Business | 555/555-5555 |  | <input checked="" type="checkbox"/> | + | - | Mobile | 555/555-5555 |  | <input type="checkbox"/> | + | - | Home | 555/555-5555 |  | <input type="checkbox"/> | + | - | *Email Type | *Email Address | Preferred |  |  | Personal | janedoe@zgmail.com | <input checked="" type="checkbox"/> | + | - |
| Address Type | As Of Date  | Status                              | Address  |                                     |         |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| Home         | 03/24/2022  | A                                   | 100 MAIN ST<br>RICHMOND, VA 99999<br>Prince George | <a href="#">View Address Detail</a> | + -     |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| *Phone Type  | Telephone   | Extension                           | Preferred  |                                     |         |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| Business     | 555/555-5555  |                                     | <input checked="" type="checkbox"/>                | +                                   | -       |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| Mobile       | 555/555-5555  |                                     | <input type="checkbox"/>                           | +                                   | -       |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| Home         | 555/555-5555  |                                     | <input type="checkbox"/>                           | +                                   | -       |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| *Email Type  | *Email Address  | Preferred                           |  |                                     |         |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| Personal     | janedoe@zgmail.com  | <input checked="" type="checkbox"/> | +  | -                                   |         |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| 20.          | <p>Run the <b>Employee Activity Report</b> for the employee using the following navigation path:<br/> <b>NavBar &gt; Menu &gt; Workforce Administration &gt; Job Information &gt; Reports &gt; Employee Activity Report</b></p>   |                                     |  |                                     |         |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |
| 21.          | <p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p><b>Note:</b> For additional information on the Employee Activity Report and the steps used to run this report, refer to the <b>HCM Human Resources Reports Catalog</b>. The <b>HCM Human Resources Reports Catalog</b> can be found on the Cardinal website under <b>Resources</b>.</p>  |                                     |  |                                     |         |  |  |      |            |   |  |                                     |     |             |           |           |           |  |  |          |              |  |                                     |   |   |        |              |  |                          |   |   |      |              |  |                          |   |   |             |                |           |  |  |          |                    |                                     |   |   |


### Termination – Involuntary (except Layoff)

| Step | Action   |
|------|--|
| 1.   | Navigate to the <b>Job Data</b> page using the following path:<br><b>NavBar &gt; Menu &gt; Workforce Administration &gt; Job Information &gt; Job Data</b> |


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



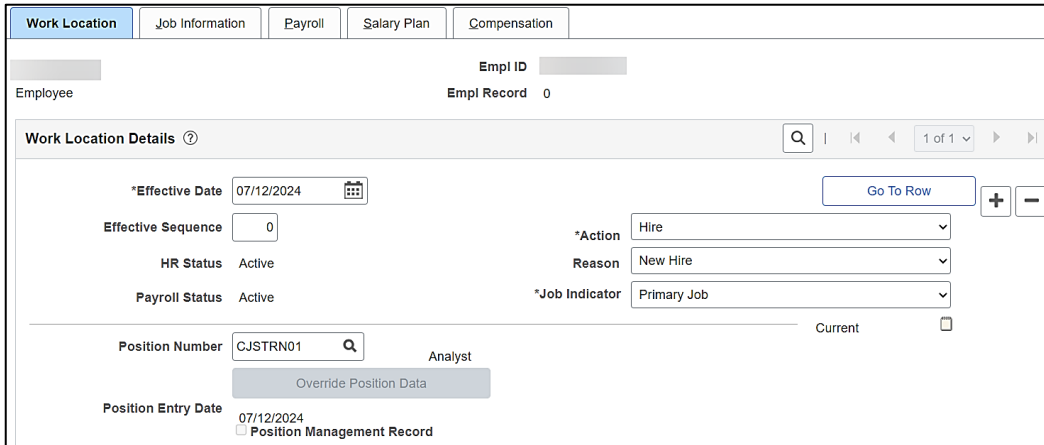

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

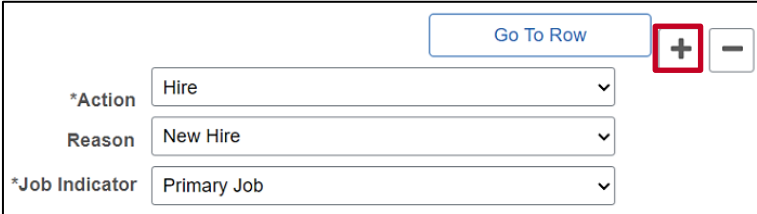
|    |  |
|----|--|
| 2. | <p>Enter the Employee's ID in the <b>Empl ID</b> field.</p> <p><b>Note:</b> Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p>  |
|----|--|



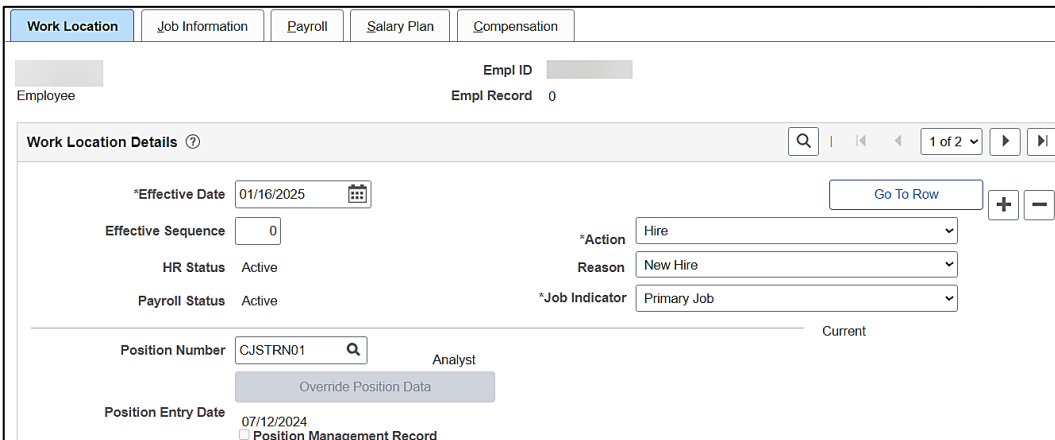
| Step | Action  |
|------|---|
| 3.   | Click the <b>Search</b> button.<br> |

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









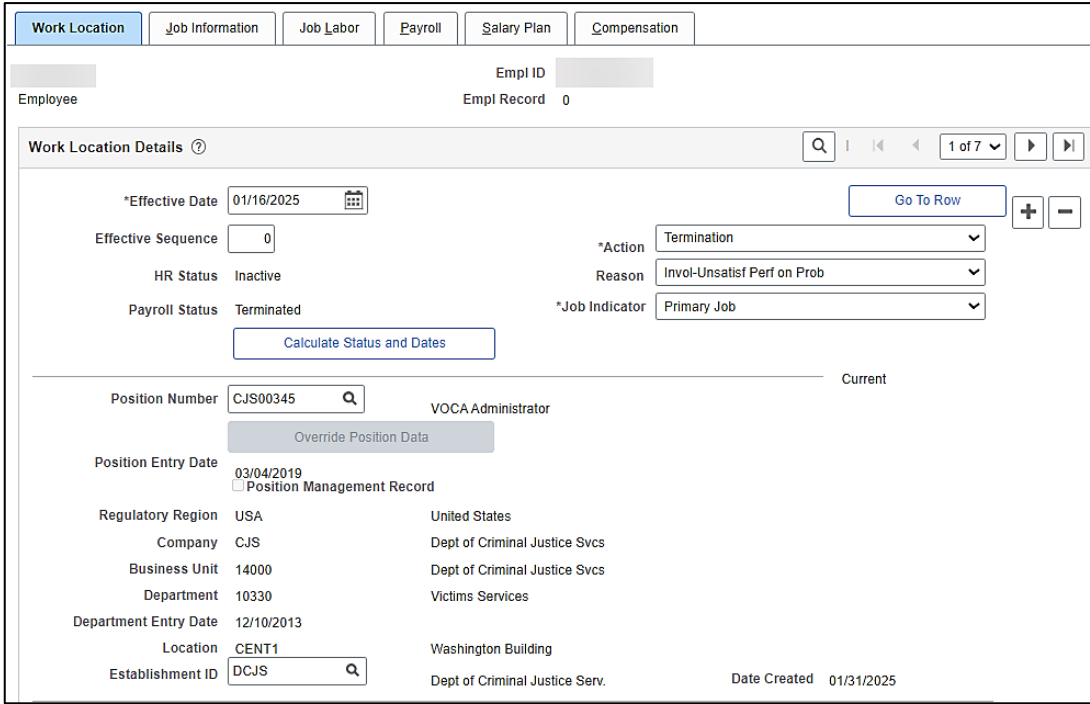
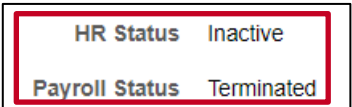
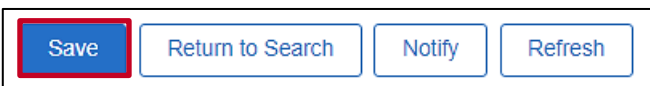

|    |   |
|----|---|
| 4. | Click the <b>Add a New Row</b> icon (+) to add a new effective dated row.<br> |
|----|---|

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





| Step  | Action  |
|---|---|
|    | <p>When a new row is created, the row count increases by one and the <b>Effective Date</b> field displays the current date.</p>   |
| 5.  | <p>Update the effective date as needed using the <b>Effective Date Calendar</b> icon.</p> <div data-bbox="293 548 805 632" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <input type="text" value="01/16/2025"/> </p> </div>  |
|    | <p>Set the effective date to be one day after the employee’s last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee’s last day on the payroll).</p> <p>If an employee’s last day is “1/15/2025”, the effective date of the termination should be “1/16/2025”. For further information on effective dating, see the Job Aid titled <b>HR351 Overview of Effective Dating</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>   |
| 6.  | <p>Click the <b>Action</b> field dropdown button and select “Termination”.</p> <div data-bbox="293 1003 1373 1123" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <input type="text" value="01/16/2025"/>  <span style="float: right;">Go To Row <input type="button" value="+"/> <input type="button" value="-"/></span></p> <p>Effective Sequence <input type="text" value="0"/> *Action <input type="text" value="Termination"/></p> <p>HR Status Inactive Reason <input type="text"/></p> </div>   |
| 7.  | <p>Click the <b>Reason</b> field dropdown button and select the applicable reason.</p> <div data-bbox="293 1213 1373 1329" style="border: 1px solid black; padding: 5px;"> <p>*Effective Date <input type="text" value="01/16/2025"/>  <span style="float: right;">Go To Row <input type="button" value="+"/> <input type="button" value="-"/></span></p> <p>Effective Sequence <input type="text" value="0"/> *Action <input type="text" value="Termination"/></p> <p>HR Status Inactive Reason <input type="text" value="Invol-Unsatisf Perf on Prob"/></p> </div> |
|  | <p>For further information on Action Reasons, see the Job Aid titled <b>HR351 Action Reason Codes</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>  |

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



| Step | Action |
|------|--------|
|------|--------|

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

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

Person ID [Redacted]

Name [Redacted] | 1 of 1 | View All

Effective Date: 09/23/2022 | Format Type: English | Display Name: [Redacted] | View Name

**Biographic Information**

Date of Birth: 10/04/1976 | Years: 48 | Months: 3 | Date of Death: [Redacted]

Birth Country: USA | United States | Birth State: [Redacted]

Birth Location: [Redacted] |  Exclude Contact Information?

**Biographical History** | 1 of 1 | View All

\*Effective Date: 09/23/2022 | \*Gender: Female | \*Highest Education Level: Masters Level Degree | \*Marital Status: Married | As of: 09/23/2022

Language Code: [Redacted] | Alternate ID: [Redacted] |  Full-Time Student

11.

Click the **Contact Information** tab.

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



| Step | Action |
|------|--------|
|------|--------|

The **Contact Information** page displays.

Biographical Details
Contact Information
Regional
VA Person Info

██████████
Empl ID ██████████

**Current Addresses**

🗨️ 🔍
1-1 of 1
View All

| Address Type | As Of Date | Status | Address  |                                     |     |
|--------------|------------|--------|--|-------------------------------------|-----|
| Home         | 03/24/2022 | A      | 100 MAIN ST<br>RICHMOND, VA 99999<br>Prince George | <a href="#">View Address Detail</a> | + - |

**Phone Information**

🗨️ 🔍
1-3 of 3
View All

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

**Email Option Selection**

Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

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

**Email Addresses**

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

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

**Email Option Selection**

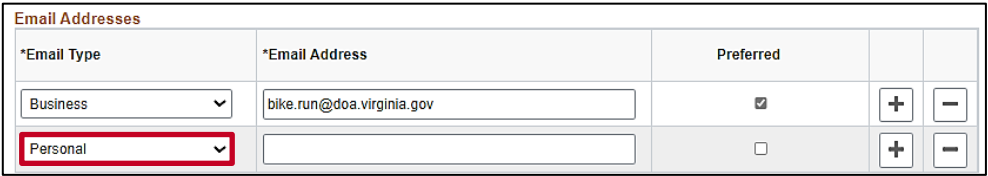
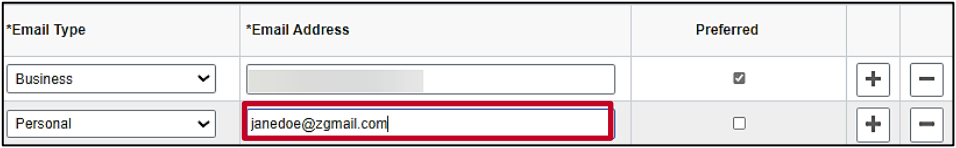

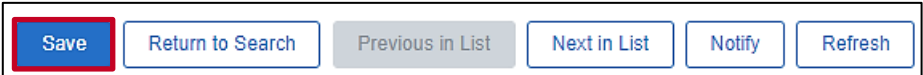
Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

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

**Email Addresses**

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



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

### Long Term Disability Not Working

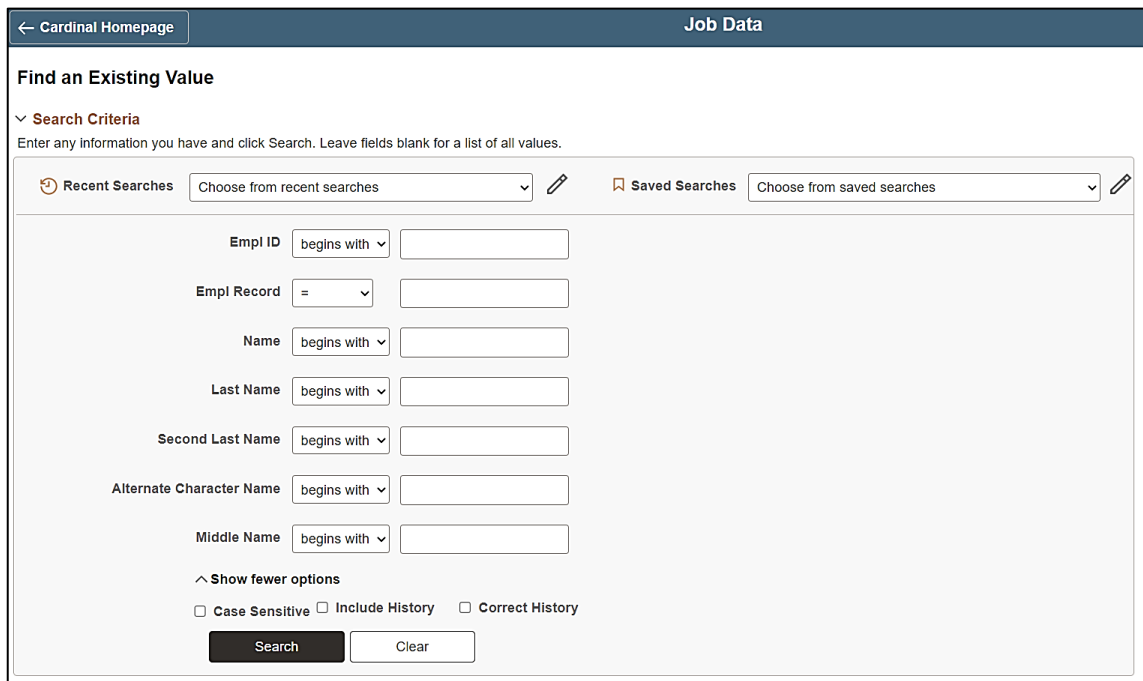
If there is a lag between STD workday 125 and the LTD claim approval, the Agency is asked to place the employee in Unpaid Leave of Absence (LOA), Personal (PER), and change benefits eligibility to COVA 100% EE Paid Grp Bill until the LTD claim is approved.

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

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


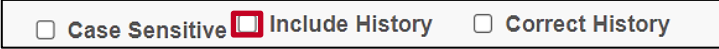

| Step | Action   |
|------|--|
| 1.   | Navigate to the <b>Job Data</b> page using the following path:<br><b>NavBar &gt; Menu &gt; Workforce Administration &gt; Job Information &gt; Job Data</b> |

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

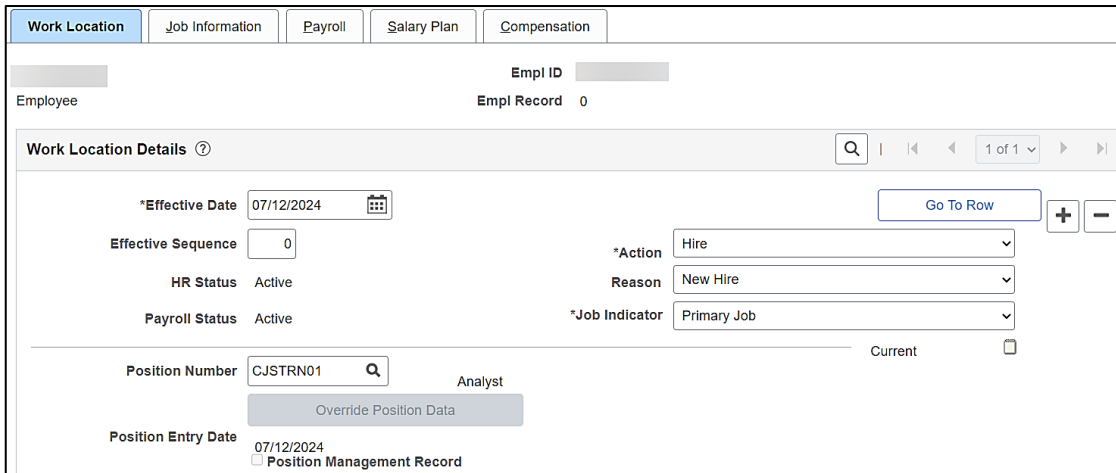


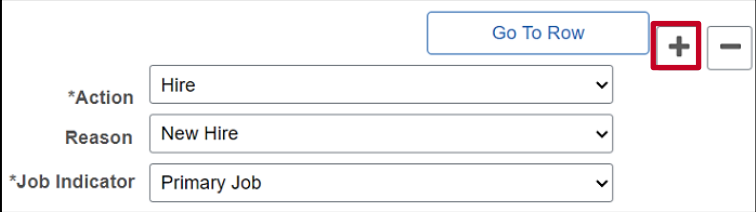

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

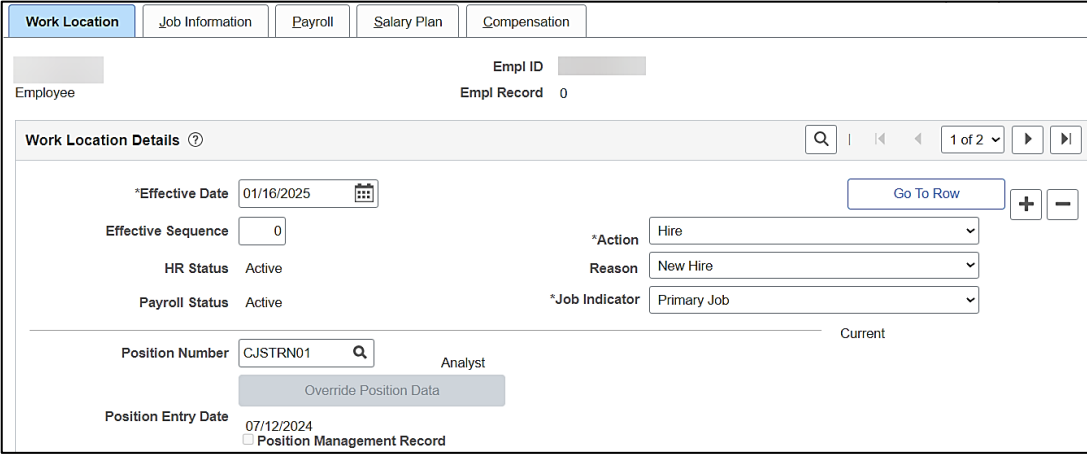



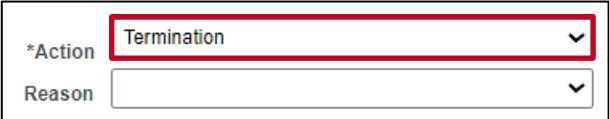
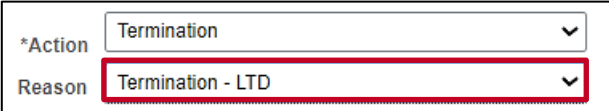


| Step | Action  |
|------|---|
| 2.   | <p>Enter the employee's Employee ID in the <b>Empl ID</b> field.</p> <p><b>Note:</b> Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee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


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



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

| Step  | Action  |
|---|---|
|   | <p>The <b>Work Location</b> page refreshes with the new effective dated row displayed.</p>    |
|    | <p>When a new row is created, the row count increases by one and the <b>Effective Date</b> field displays the current date.</p>   |
| <p>6.</p>   | <p>Update the effective date as needed using the <b>Effective Date Calendar</b> icon.</p>    |
|  | <p>Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll).</p> <p>If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled <b>HR351 Overview of Effective Dating</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p> |
| <p>7.</p>   | <p>Click the <b>Action</b> dropdown button and select "Termination".</p>   |
| <p>8.</p>   | <p>Click the <b>Reason</b> dropdown button and select "Termination - LTD".</p>   |



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

The **Work Location** page refreshes.

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

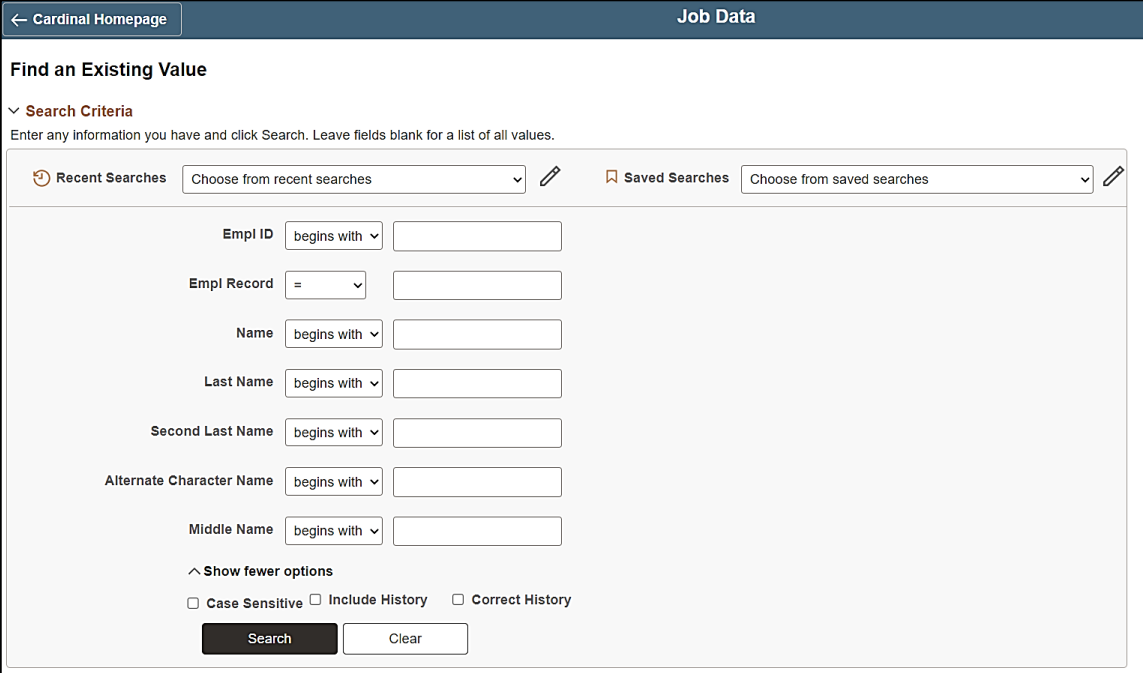



The screenshot shows the 'Work Location Details' form for Employee [redacted] with Empl ID [redacted] and Empl Record 1. The form includes tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation. The 'Work Location Details' section shows the following information:

- \*Effective Date: 01/16/2025
- Effective Sequence: 0
- HR Status: Inactive
- Payroll Status: Terminated
- \*Action: Termination
- Reason: Termination - LTD
- \*Job Indicator: Primary Job
- Position Number: CJS00335
- Position Entry Date: 02/10/2023
- Regulatory Region: USA
- Company: CJS
- Business Unit: 14000
- Department: 10610
- Department Entry Date: 02/10/2023
- Location: CENT1
- Establishment ID: DCJS
- Termination Date: 01/15/2025
- Last Start Date: 02/10/2023
- Last Date Worked: 01/15/2025
- Date Created: 02/03/2025


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

|     |  |
|-----|--|
| 10. | Click the <b>Save</b> button. <div data-bbox="292 1690 933 1774" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px; background-color: #0070c0; color: white;">Save</div> <div style="border: 1px solid black; padding: 2px 10px;">Return to Search</div> <div style="border: 1px solid black; padding: 2px 10px;">Notify</div> <div style="border: 1px solid black; padding: 2px 10px;">Refresh</div> </div> </div> |
|-----|--|

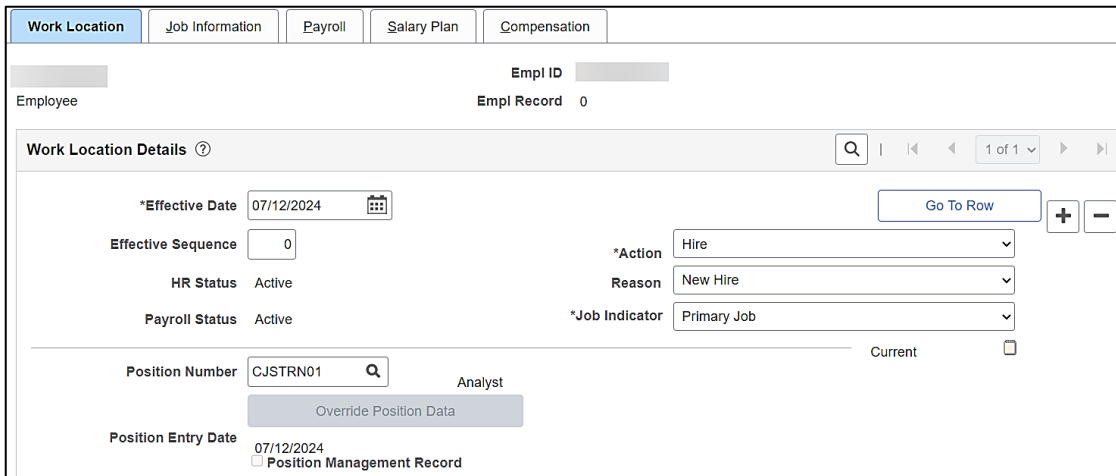
### Retirement – VRS Retiree


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



| Step | Action  |
|------|---|
| 4.   | Click the <b>Search</b> button.<br> |

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



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



| Step | Action |
|------|--------|
|------|--------|

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



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

6.

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



Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll).

If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.


7.

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

8.

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



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

The **Work Location** page refreshes.

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


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

- Employee: [Redacted], Empl ID: [Redacted], Empl Record: 0
- Work Location Details:
  - \*Effective Date: 01/16/2025
  - Effective Sequence: 0
  - HR Status: Inactive
  - Payroll Status: Retired
  - \*Action: Retirement
  - Reason: Service Retirement
  - \*Job Indicator: Primary Job
  - Position Number: CJS00170
  - Position Entry Date: 06/22/2012
  - Regulatory Region: USA
  - Company: CJS
  - Business Unit: 14000
  - Department: 10620
  - Location: CENT1
  - Establishment ID: DCJS
  - Termination Date: 01/15/2025
  - Last Start Date: 06/22/2012
  - Last Date Worked: 01/15/2025

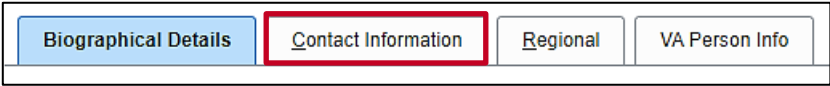
|    |  |
|----|--|
| 9. | Validate that the <b>HR Status</b> displays as “Inactive” and the <b>Payroll Status</b> displays as “Retired”. <div data-bbox="292 1512 584 1627" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Retired</p> </div> |
|----|--|

|     |  |
|-----|--|
| 10. | Click the <b>Save</b> button. <div data-bbox="292 1711 933 1795" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p> <span style="border: 2px solid red; padding: 2px 10px;">Save</span> <span style="padding: 2px 10px;">Return to Search</span> <span style="padding: 2px 10px;">Notify</span> <span style="padding: 2px 10px;">Refresh</span> </p> </div> |
|-----|--|

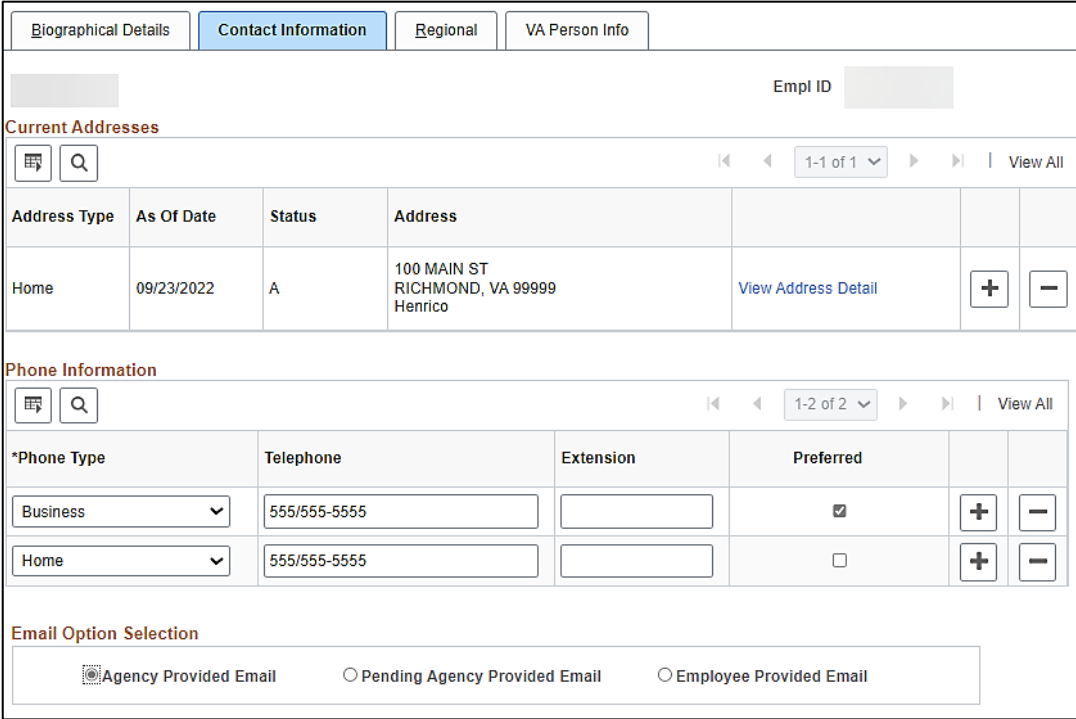
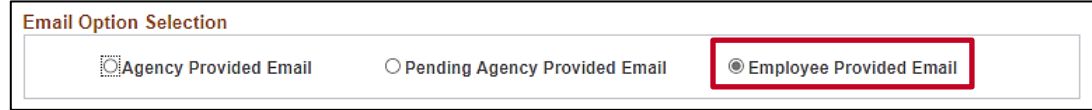

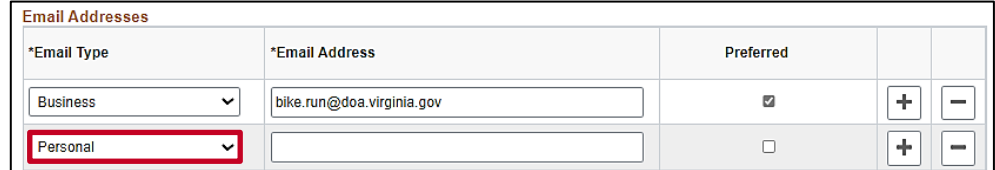


| Step  | Action  |
|---|---|
|  | The employee's email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. Access is provided to Cardinal for 18 months after the termination date. |
| 11.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

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

|     |   |
|-----|---|
| 12. | Click the <b>Contact Information</b> tab.<br> |
|-----|---|

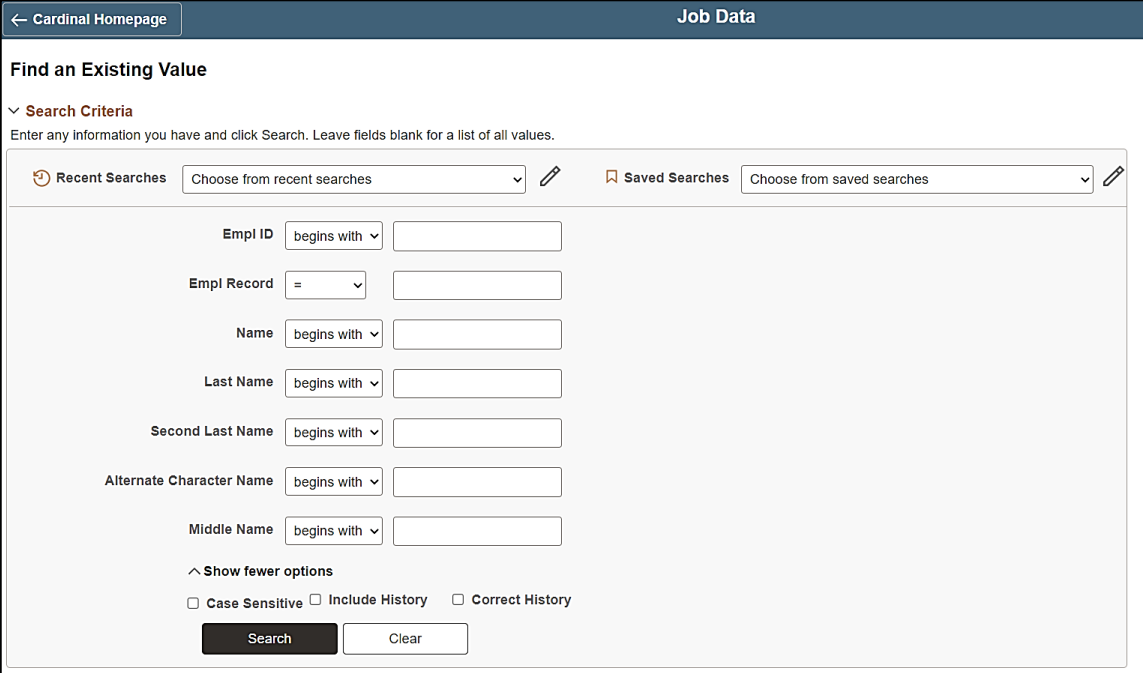





| Step | Action  |
|------|---|
|      | <p>The <b>Contact Information</b> page displays.</p>   |
| 13.  | <p>Select the <b>Employee Provided Email</b> radio button option in the <b>Email Option Selection</b> section.</p>  |
| 14.  | <p>Click the <b>Add a New Row</b> icon (+) to add a new email address.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




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

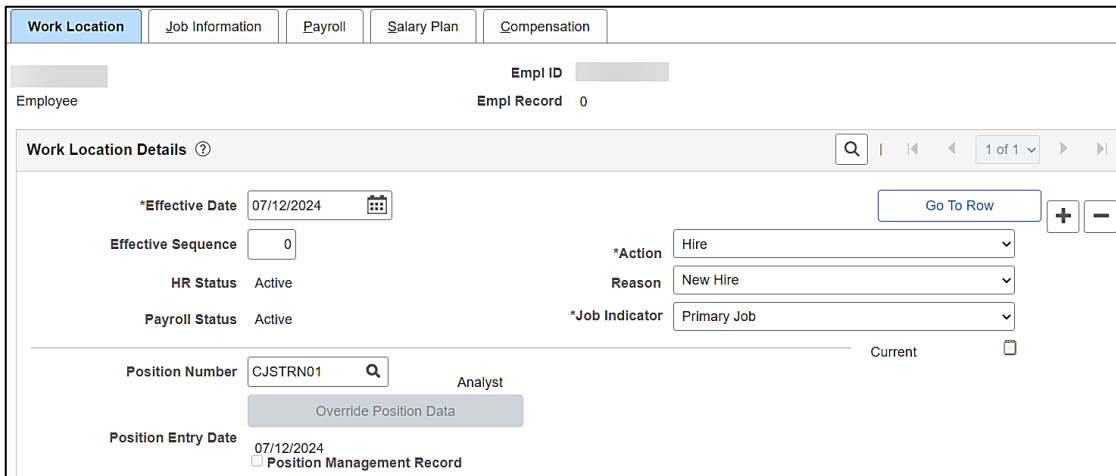
### Retirement – ORP Retiree


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



| Step | Action  |
|------|---|
| 4.   | Click the <b>Search</b> button.<br> |

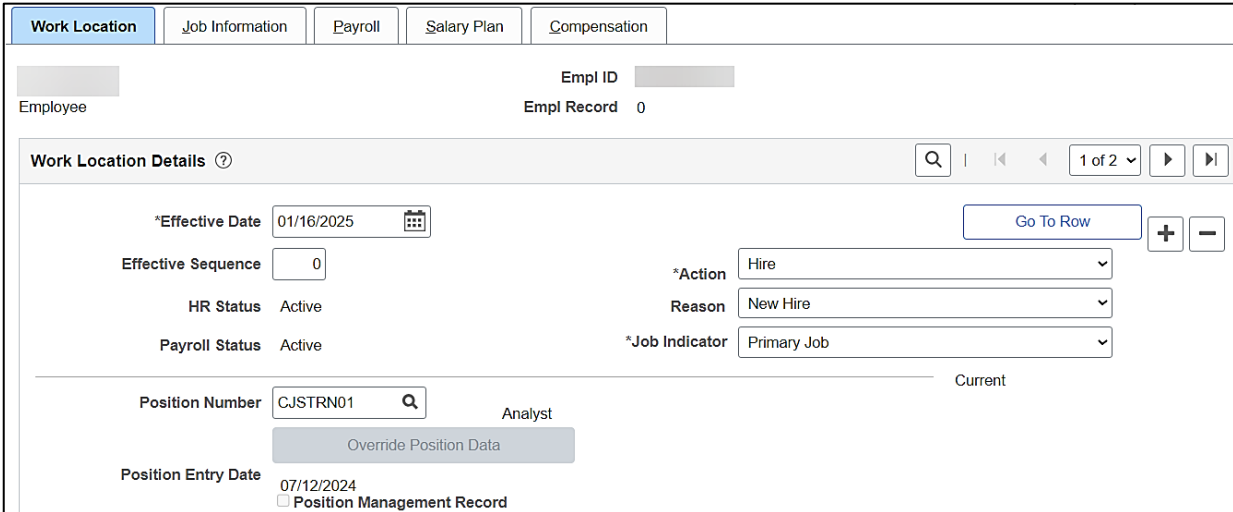
The **Job Data** page for the employee displays with the **Work Location** tab displayed by default.



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

| Step | Action |
|------|--------|
|------|--------|

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



The screenshot shows the 'Work Location' tab selected. It displays employee information (Empl ID, Empl Record 0) and 'Work Location Details'. Key fields include:
 

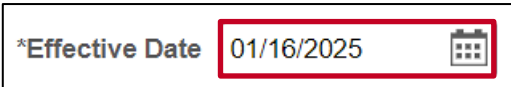
- \*Effective Date: 01/16/2025 (with a calendar icon)
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Action: Hire
- Reason: New Hire
- \*Job Indicator: Primary Job
- Position Number: CJSTRN01 (Analyst)
- Position Entry Date: 07/12/2024




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

6.

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



\*Effective Date 01/16/2025 



Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll).

If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

7.

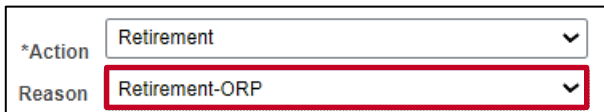
Click the **Action** dropdown button and select "Retirement".





\*Action Retirement   
Reason 


8.

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



\*Action Retirement   
Reason Retirement-ORP 



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

The **Work Location** page refreshes.

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

TRACK FIELD Employee
Empl ID 00353750000  
Empl Record 0

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Work Location Details 1 of 2

\*Effective Date: 01/16/2025 Go To Row

Effective Sequence: 0 \*Action: Retirement

HR Status: Inactive Reason: Retirement-ORP

Payroll Status: Retired \*Job Indicator: Primary Job

Position Number: CJS00327 Regulatory Investigator

Position Entry Date: 08/10/2018 United States

Regulatory Region: USA Dept of Criminal Justice Svcs

Company: CJS Dept of Criminal Justice Svcs

Business Unit: 14000 Compliance Enforcement Trainin

Department: 10620 Date Created 02/03/2025

Department Entry Date: 06/25/2004

Location: MOBL2 Fairfax, Manassas - MOB

Establishment ID: DCJS Dept of Criminal Justice Serv.

Last Start Date: 08/10/2018 Termination Date: 01/15/2025


Last Date Worked: 01/15/2025 STD Claim Number

Override Last Date Worked Layoff Notice Date

Recall Eligibility Flag

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

|     |   |
|-----|---|
| 10. | Click the <b>Save</b> button. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 5px 15px; background-color: #0056b3; color: white;">Save</div> <div style="padding: 5px 15px;">Return to Search</div> <div style="padding: 5px 15px;">Notify</div> <div style="padding: 5px 15px;">Refresh</div> </div> </div> |
|-----|---|

| Step  | Action   |
|---|--|
|    | Now the Agency HR Administrator should hire the employee into the ORP retirement position using a new employment instance.   |
| 11.   | Navigate to <b>New Employment Instance</b> page using this path:<br><b>NavBar &gt; Menu &gt; Workforce Administration &gt; Personal Information &gt; Organizational Relationships &gt; New Employment Instance</b>   |
| <p>The following question will display.</p> <div data-bbox="373 693 1263 961" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> <span style="color: white; background-color: #2c4e64; padding: 2px 5px;">&lt; Biographical Details</span> <span style="color: white; background-color: #2c4e64; padding: 2px 5px;">New Employment Instance</span> </div> <p style="margin-top: 10px;">Do you wish to open the Job Data associated to this emplid: <span style="background-color: #ccc; padding: 0 20px;"> </span> Employee Record: 0 (25101,91)</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </div> </div>                               |  |
| 12.   | Click the <b>No</b> button to create a new employment instance. <div data-bbox="292 1050 1112 1291" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> <span style="color: white; background-color: #2c4e64; padding: 2px 5px;">&lt; Biographical Details</span> <span style="color: white; background-color: #2c4e64; padding: 2px 5px;">New Employment Instance</span> </div> <p style="margin-top: 10px;">Do you wish to open the Job Data associated to this emplid: <span style="background-color: #ccc; padding: 0 20px;"> </span> Employee Record: 0 (25101,91)</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> </div> </div> |
| <p>The <b>New Employment Instance</b> page displays.</p> <div data-bbox="418 1381 1218 1675" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; padding-bottom: 5px;"> <span style="color: white; background-color: #2c4e64; padding: 2px 5px;">&lt; Biographical Details</span> <span style="color: white; background-color: #2c4e64; padding: 2px 5px;">New Employment Instance</span> </div> <div style="text-align: center; margin-top: 10px;"> <p><b>New Employment Instance</b></p> <p>Empl ID <span style="background-color: #ccc; padding: 0 20px;"> </span></p> <p>Empl Record    1</p> <div style="margin-top: 10px; color: white; background-color: #2c4e64; padding: 5px 15px; display: inline-block; border: 1px solid #ccc;">Add Relationship</div> </div> </div> |  |



| Step | Action  |
|------|---|
| 13.  | <p>Click the <b>Add Relationship</b> button to add job information for the new employee record.</p> <div data-bbox="292 432 1094 722" style="border: 1px solid black; padding: 5px;"> <div style="background-color: #2c4e64; color: white; padding: 2px; display: flex; justify-content: space-between;"> <span>&lt; Biographical Details</span> <span>New Employment Instance</span> </div> <div style="text-align: center; padding: 10px;"> <p><b>New Employment Instance</b></p> <p>Empl ID <input type="text"/></p> <p>Empl Record 1</p> <div style="border: 2px solid red; display: inline-block; padding: 5px; margin-top: 10px;"> <span style="background-color: #2c4e64; color: white; padding: 5px 15px; border-radius: 3px;">Add Relationship</span> </div> </div> </div>   |
|      | <p>The new <b>Job Record</b> for the employee is displayed with the <b>Work Location</b> tab displayed by default.</p> <div data-bbox="292 812 1341 1520" style="border: 1px solid black; padding: 5px;"> <div style="background-color: #e6e6e6; padding: 2px; display: flex; justify-content: space-between; border-bottom: 1px solid black;"> <span>Work Location</span> <span>Job Information</span> <span>Job Labor</span> <span>Payroll</span> <span>Salary Plan</span> <span>Compensation</span> </div> <div style="padding: 5px;"> <p>Employee <input type="text"/> Empl ID <input type="text"/></p> <p>Empl Record 1</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <p><b>Work Location Details</b> <span style="float: right;">1 of 1</span></p> <p>*Effective Date <input type="text" value="02/03/2025"/> <span style="float: right;">Go To Row</span></p> <p>Effective Sequence <input type="text" value="0"/> <span style="float: right;">*Action Hire</span></p> <p>HR Status Active <span style="float: right;">Reason</span></p> <p>Payroll Status Active <span style="float: right;">*Job Indicator Primary Job</span></p> <p style="text-align: center; margin-top: 5px;"><span>Calculate Status and Dates</span></p> <hr/> <p>Position Number <input type="text"/> <span style="float: right;">Current</span></p> <p style="text-align: center; background-color: #e6e6e6; padding: 2px; margin-top: 5px;">Override Position Data</p> <p>Position Entry Date <input type="text"/></p> <p>*Regulatory Region <input type="text" value="USA"/> <span style="float: right;">United States</span></p> <p>*Company <input type="text"/></p> <p>*Business Unit <input type="text" value="15100"/> <span style="float: right;">Department of Accounts</span></p> <p>*Department <input type="text"/></p> <p>Department Entry Date <input type="text"/></p> <p>*Location <input type="text"/></p> </div> </div> </div> |
| 14.  | <p>The <b>Effective Date</b> field defaults to the current system date. Update this date as needed using the <b>Calendar</b> icon.</p> <div data-bbox="292 1640 695 1703" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>*Effective Date <input style="border: 2px solid red;" type="text" value="01/16/2025"/> <span style="float: right;">Calendar icon</span></p> </div>   |



| Step | Action  |
|------|---|
|      | <p>The <b>Action</b> field defaults to “Hire”. Do not change.</p> <div style="border: 1px solid black; padding: 5px;"> <p>*Action <input type="text" value="Hire"/></p> <p>Reason <input type="text"/></p> </div>   |
| 15.  | <p>Click the <b>Reason</b> dropdown button and select “Hire ORP Ret”.</p> <div style="border: 1px solid black; padding: 5px;"> <p>*Action <input type="text" value="Hire"/></p> <p>Reason <input type="text" value="Hir ORP Ret"/></p> </div>   |
| 16.  | <p>Locate and select the ORP position for the Agency using the <b>Position Number Look up</b> icon.</p> <p><b>Note:</b> Enter “%ORP” to search for the ORP Position Number.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Position Number <input type="text" value="CVAORP00"/> <input type="button" value="Q"/> <span style="margin-left: 20px;">ORP Retiree Position</span></p> </div>              |
| 17.  | <p>Click the <b>Job Information</b> tab.</p> <div style="border: 1px solid black; padding: 5px;"> <p> <input type="button" value="Work Location"/> <input style="border: 2px solid red;" type="button" value="Job Information"/> <input type="button" value="Job Labor"/> <input type="button" value="Payroll"/> <input type="button" value="Salary Plan"/> <input type="button" value="Compensation"/> </p> </div> |



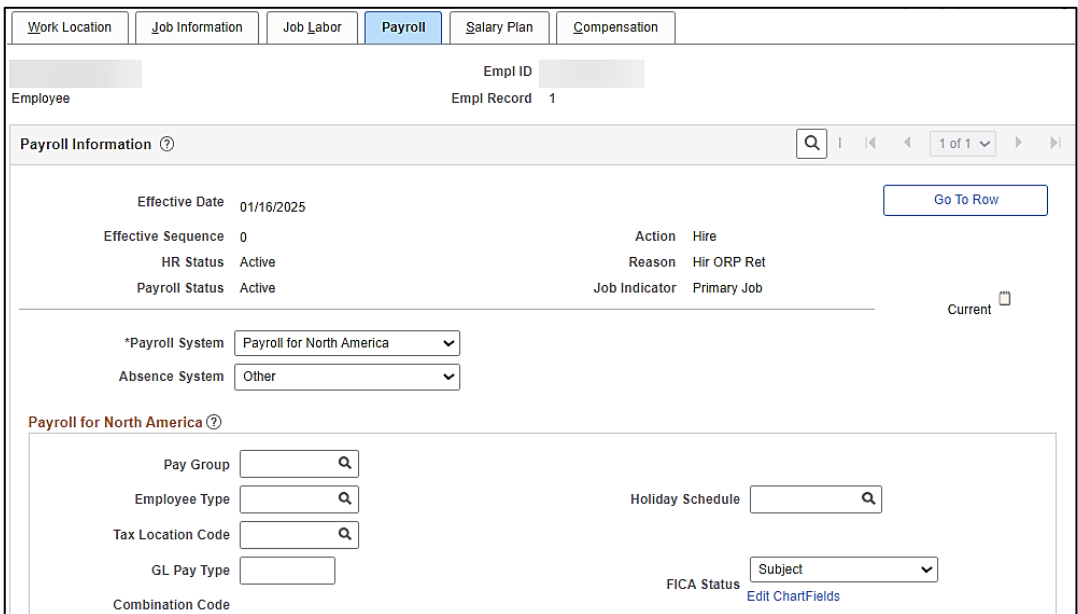

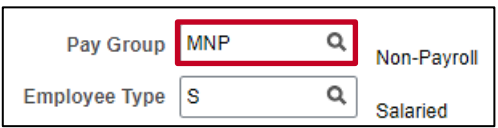
The **Job Information** page displays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation


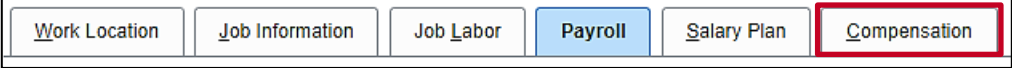
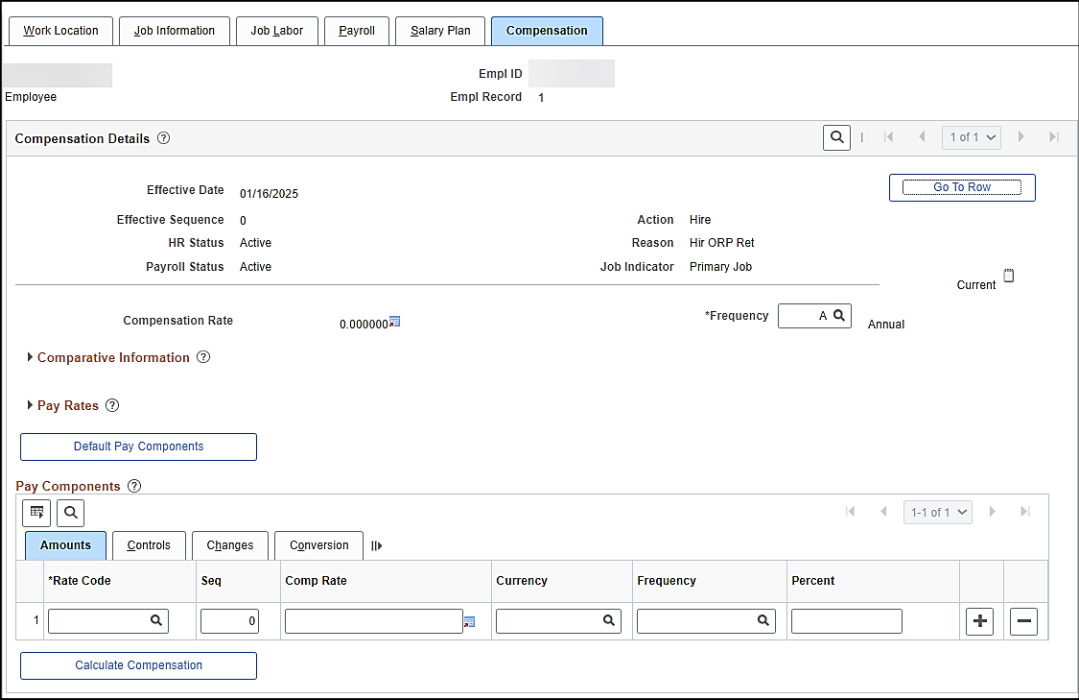


Employee
Empl ID 
Empl Record 1

Job Information Details Q | < > 1 of 1 >

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

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



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



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

|     |   |
|-----|---|
| 26. | Click the <b>Benefits Program Participation</b> link. <div style="border: 1px solid gray; padding: 5px; margin: 10px 0;"> <span>Job Data</span>   <span>Employment Data</span>   <span>Earnings Distribution</span>   <span style="border: 1px solid red; padding: 2px;">Benefits Program Participation</span> </div> |
|-----|---|

The **Benefit Program Participation** page displays.

Benefit Program Participation

Employee
Empl ID [redacted]

Empl Record 1

**Benefit Status** 1 of 1

Benefit Record Number 1
Go To Row

Effective Date 01/16/2025
Action Hire

Effective Sequence 0
Reason Hir ORP Ret

HR Status Active
Payroll Status Active
Job Indicator Primary Job

\*Benefits System Benefits Administration
Benefits Employee Status Active

Annual Benefits Base Rate [input] USD
ACA Eligibility Details

**Benefits Administration Eligibility**

BAS Group ID [input]
Elig Fld 2 [input]
Elig Fld 3 [input]

Elig Fld 1 [input]
Elig Fld 5 [input]
Elig Fld 6 [input]


Elig Fld 4 [input]
Elig Fld 8 [input]
Elig Fld 9 [input]

Elig Fld 7 [input]

**Benefit Program Participation Details** 1 of 1 | View All

Effective Date 01/16/2025
Currency Code USD

Benefit Program PSX
Sys delivered empty Ben Pgm

| Step  | Action  |
|---|---|
| 27.   | <p>Use the Configuration Workbook to complete the <b>Benefits Administration Eligibility Fields 2, 3, 8 &amp; 9</b> based on the appropriate scenarios for the ORP Retiree.</p> <div data-bbox="293 468 1403 674" style="border: 1px solid black; padding: 5px;"> <p>Benefits Administration Eligibility ⓘ</p> <p>BAS Group ID <input type="text"/></p> <p>Elig Fld 1 <input type="text"/></p> <p>Elig Fld 2 <input type="text" value="007008000"/></p> <p>Elig Fld 3 <input type="text" value="N"/></p> <p>Elig Fld 4 <input type="text"/></p> <p>Elig Fld 5 <input type="text"/></p> <p>Elig Fld 6 <input type="text"/></p> <p>Elig Fld 7 <input type="text"/></p> <p>Elig Fld 8 <input type="text" value="12-12"/></p> <p>Elig Fld 9 <input type="text" value="RR-GB"/></p> </div> |
|  | <p>For further information on Eligibility Fields, see the Job Aid titled <b>BN361 Overview of the Eligibility Configuration Fields</b>. This Job Aid can be found on the Cardinal website in <b>Job Aids</b> under <b>Learning</b>.</p>   |
| 28.   | <p>Click the <b>OK</b> button.</p> <div data-bbox="293 898 685 968" style="border: 1px solid black; padding: 5px;"> <p><input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/></p> </div>  |
| 29.   | <p>Run the <b>Employee Activity Report</b> for the employee using the following navigation path:<br/> <b>NavBar &gt; Menu &gt; Workforce Administration &gt; Job Information &gt; Reports &gt; Employee Activity Report</b></p>   |
| 30.   | <p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p><b>Note:</b> For additional information on the Employee Activity Report and the steps used to run this report, refer to the <b>Cardinal HCM Human Resources Reports Catalog</b>. The <b>Cardinal HCM Human Resources Reports Catalog</b> can be found on the Cardinal website under <b>Resources</b>.</p>  |