

**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 the Termination 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 correct cause of separation.

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

- Benefit status is updated in Cardinal Benefits (BN); 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 (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 **HR351\_Managing the Mass Upload Process**. 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 Quick Reference Guide** section **Processing Benefit Elections: Transfer Out / Termination Employees** for more details. This job aid is located on the Cardinal website in **Job Aids** under **Learning**.

**Table of Contents**

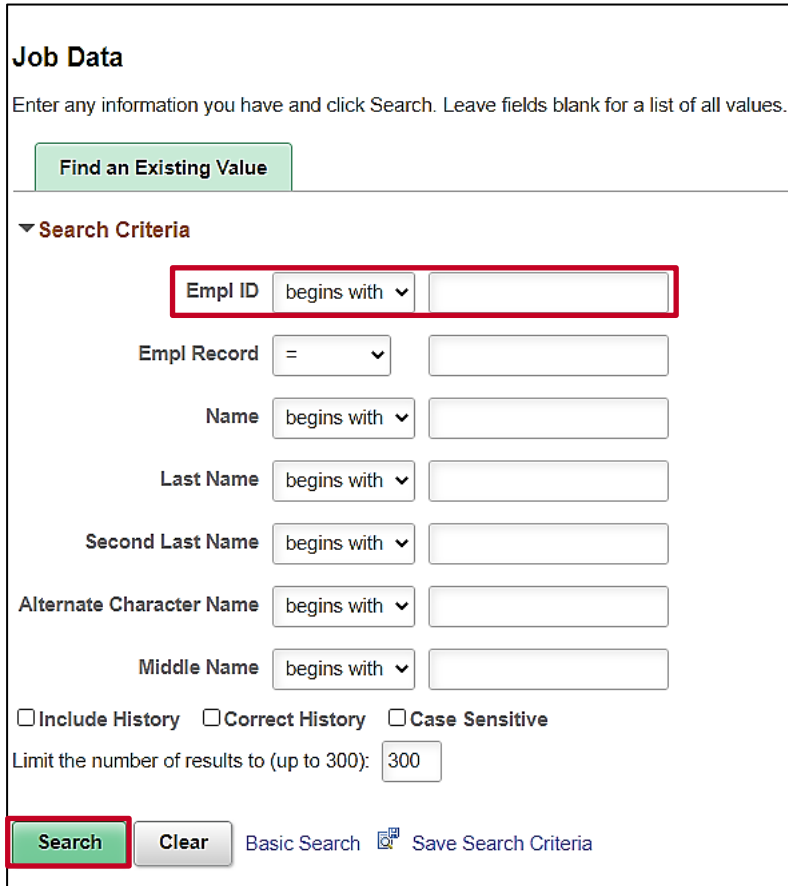
|   |    |
|---|----|
| Termination – Voluntary .....                   | 3  |
| Termination – Involuntary (except Layoff) ..... | 11 |
| Retirement – VRS Retiree.....                   | 18 |
| Retirement – ORP Retiree .....                  | 24 |

**Termination – Voluntary**

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

**Navigator > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.

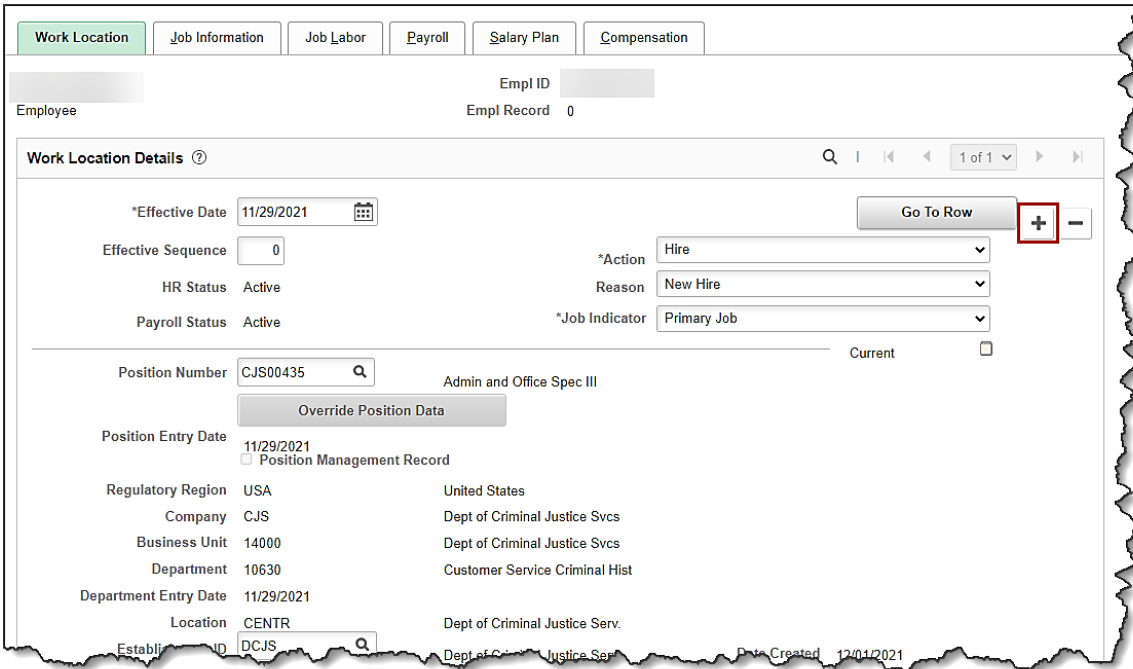


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

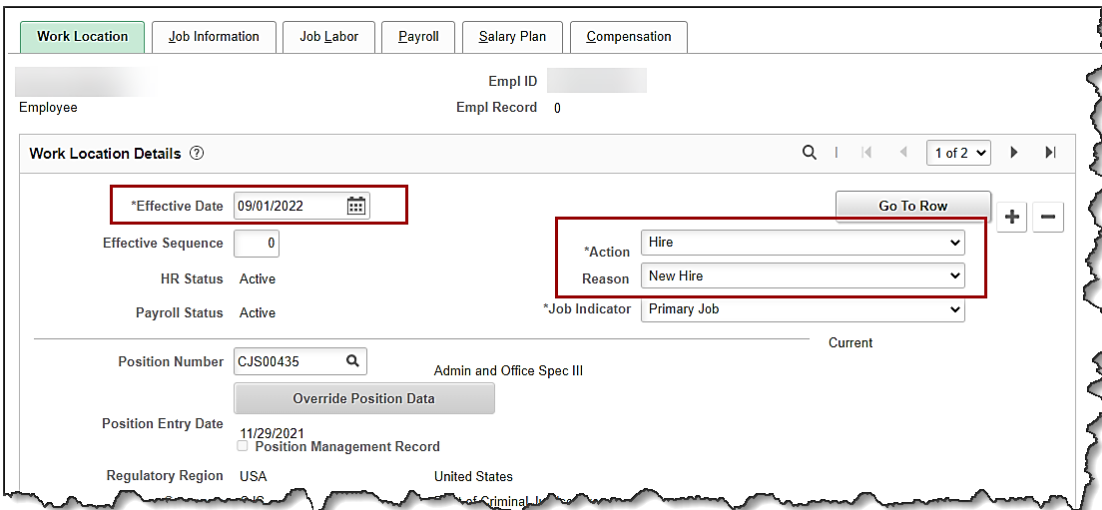
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



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), Position Entry Date (11/29/2021), Regulatory Region (USA), Company (CJS), Business Unit (14000), Department (10630), and Location (CENTR). The \*Action dropdown is set to 'Hire', Reason to 'New Hire', and \*Job Indicator to 'Primary Job'. A red box highlights the '+' icon in the 'Go To Row' button.

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

The **Work Location** tab refreshes with a new effective dated row displayed.



The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section includes fields for \*Effective Date (09/01/2022), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Position Number (CJS00435), Position Entry Date (11/29/2021), Regulatory Region (USA), Company (CJS), Business Unit (14000), Department (10630), and Location (CENTR). The \*Action dropdown is set to 'Hire', Reason to 'New Hire', and \*Job Indicator to 'Primary Job'. A red box highlights the '+' icon in the 'Go To Row' button.

**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

**Note:** 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).

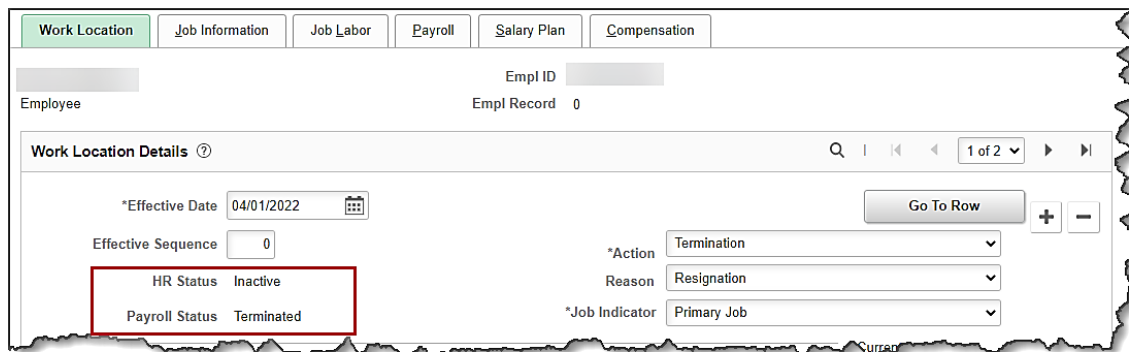
If an employee’s last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351\_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

6. Select the “**Termination**” option using the **Action** field dropdown button.
7. Select the applicable reason using the **Reason** field dropdown button.

**Note:** 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.

For further information on Action Reasons, see the Job Aid titled **HR351\_Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The **Job Data** page refreshes.



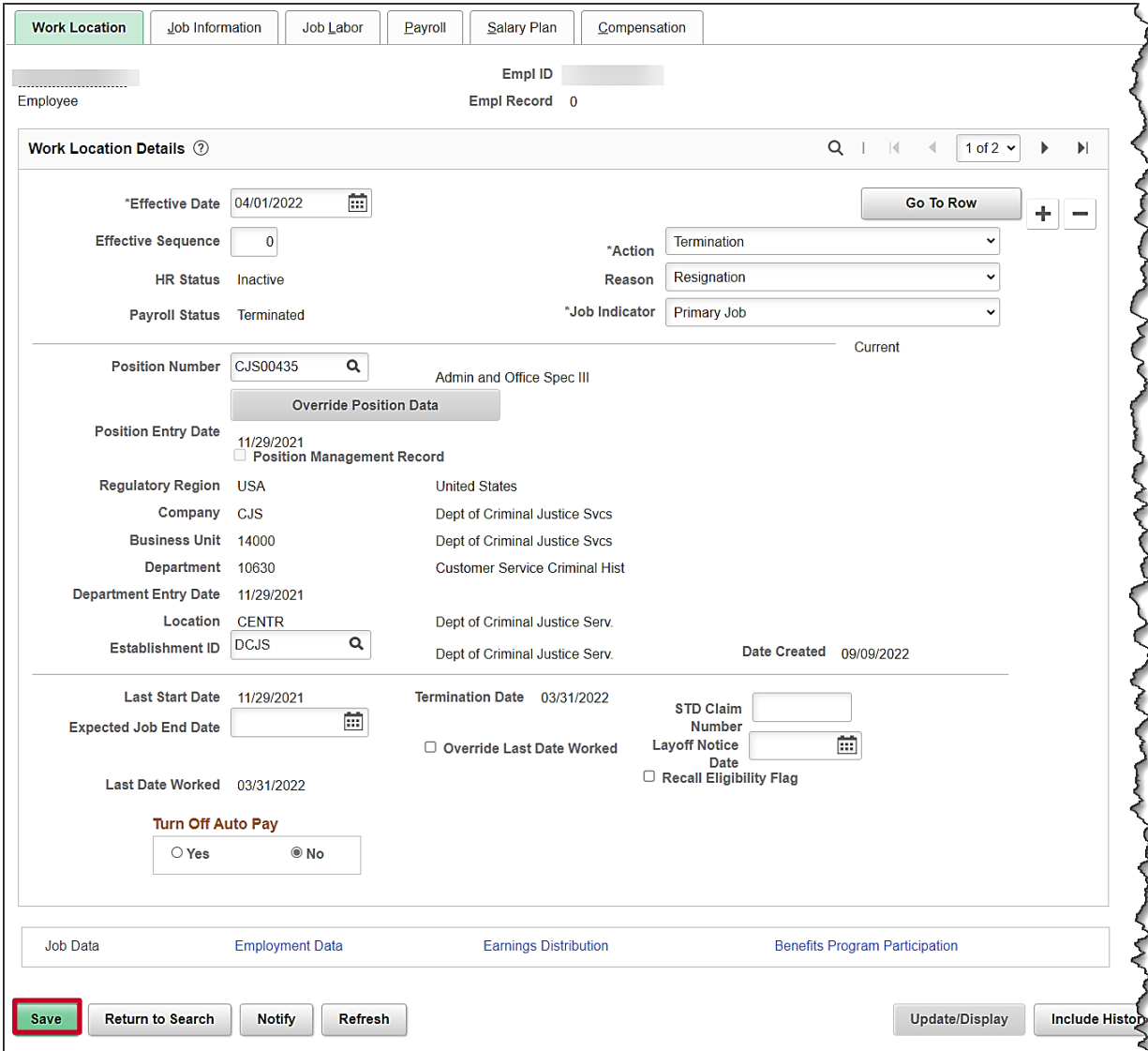
The screenshot shows the 'Work Location Details' section of a web application. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below the tabs, there are fields for 'Empl ID' and 'Empl Record' (0). The 'Work Location Details' section includes a search bar, a 'Go To Row' button, and a table with the following data:

| *Effective Date | Effective Sequence | *Action     | Reason      | *Job Indicator |
|-----------------|--------------------|-------------|-------------|----------------|
| 04/01/2022      | 0                  | Termination | Resignation | Primary Job    |

Below the table, the 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Terminated'. These two fields are highlighted with a red box in the screenshot.

8. After selecting the **Action** and **Action Reason**, the **HR Status** and **Payroll Status** fields automatically update. Validate that the HR status displays as “**Inactive**” and the Payroll status displays as “**Terminated**”.

The **Job Data** page returns.



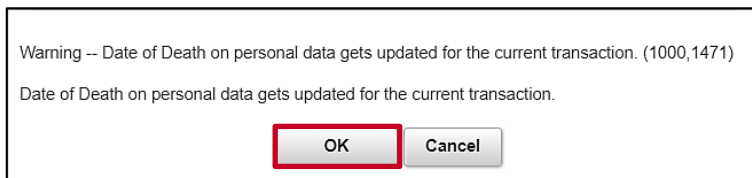
The screenshot shows the 'Job Data' tab selected in a web application. At the top, there are navigation tabs: 'Work Location' (highlighted), 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below these, the 'Employee' section shows 'Empl ID' and 'Empl Record 0'. The main area is titled 'Work Location Details' and contains several sections of data:

- Effective Date:** 04/01/2022
- Effective Sequence:** 0
- HR Status:** Inactive
- Payroll Status:** Terminated
- \*Action:** Termination
- Reason:** Resignation
- \*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)
- Last Date Worked:** 03/31/2022
- Turn Off Auto Pay:** Radio buttons for Yes and No (No is selected).

At the bottom of the form, there are buttons for 'Save' (highlighted with a red box), 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

9. Click the **Save** button.

**Note:** If a Termination Action Reason of “**Death**” or “**Death with Dependent**” is selected, the death date on the employee’s Personal Record is updated, and the **Death Warning Message** displays in a pop-up window.



The warning message pop-up window contains the following text:

Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)

Date of Death on personal data gets updated for the current transaction.

At the bottom of the window are two buttons: 'OK' (highlighted with a red box) and 'Cancel'.

10. Click the **OK** button.



The **Job Data** page returns.

The screenshot displays the 'Work Location' tab of the HR351 system. At the top, there are navigation tabs: 'Work Location' (selected), 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below these, the employee's 'Empl ID' and 'Empl Record' (0) are shown. The main section is titled 'Work Location Details' and contains the following information:

- Effective Date:** 04/01/2022
- Effective Sequence:** 0
- HR Status:** Inactive
- Payroll Status:** Terminated
- \*Action:** Termination
- Reason:** Resignation
- \*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)
- Last Date Worked:** 03/31/2022
- Turn Off Auto Pay:** Yes (radio), No (radio, selected)

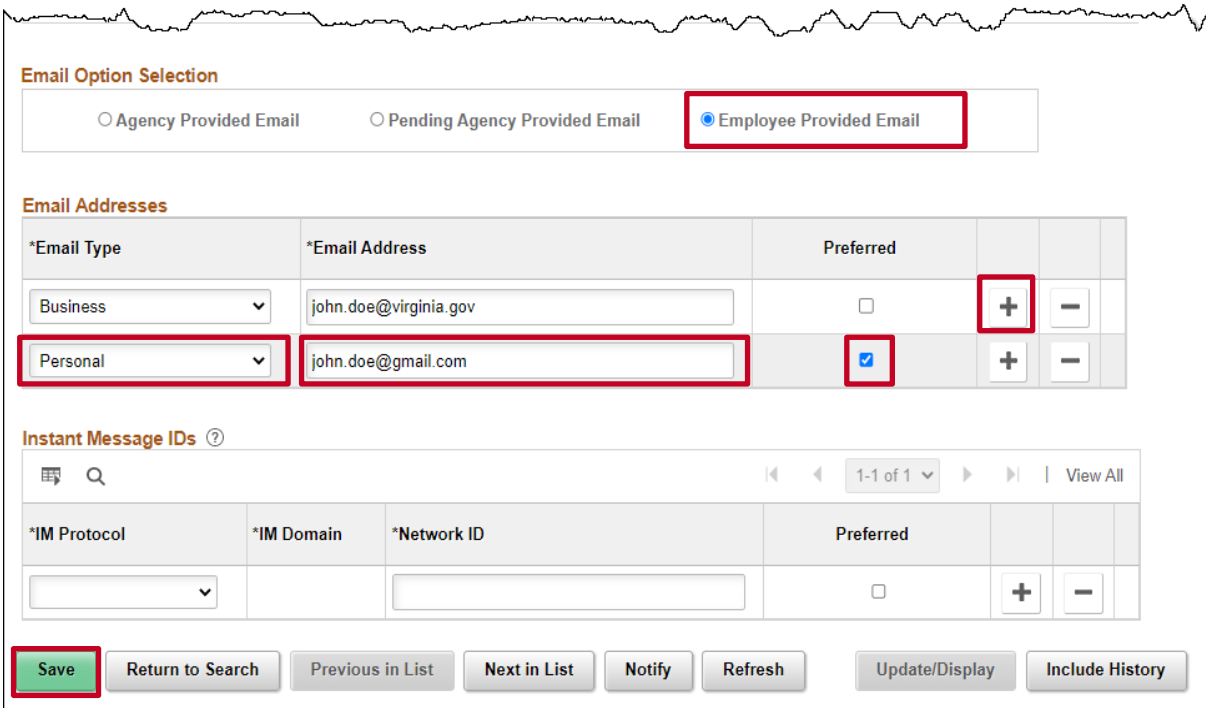
At the bottom of the form, there are navigation links: 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. Below these are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

11. The employee's email address should be updated to a personal email in Personal Data.
12. Navigate to the **Modify a Person** page using the following navigation:  
**Navigator > Workforce Administration > Personal Information > Modify a Person**





The **Contact Information** tab displays.



**Email Option Selection**

Agency Provided Email     Pending Agency Provided Email     Employee Provided Email

**Email Addresses**

| *Email Type | *Email Address        | Preferred                           |   |   |
|-------------|-----------------------|-------------------------------------|---|---|
| Business    | john.doe@virginia.gov | <input type="checkbox"/>            | + | - |
| Personal    | john.doe@gmail.com    | <input checked="" type="checkbox"/> | + | - |

**Instant Message IDs** ⓘ

1-1 of 1 | View All

| *IM Protocol | *IM Domain | *Network ID | Preferred                |   |   |
|--------------|------------|-------------|--------------------------|---|---|
|              |            |             | <input type="checkbox"/> | + | - |

**Save**    Return to Search    Previous in List    Next in List    Notify    Refresh    Update/Display    Include History

15. Under the **Email Option Selection** click the **Employee Provided Email** indicator.
16. Click the **Add a New Row** button to add a new email address.
17. Select **Personal** from the **Email Type** field.
18. Enter the personal email address in the **Email Address** field
19. Check the **Preferred** checkbox.
20. Click the **Save** button.

The **Contact Information** tab refreshes.

**Email Option Selection**

Agency Provided Email   
  Pending Agency Provided Email   
  Employee Provided Email

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**Email Addresses**

| *Email Type | *Email Address     | Preferred                           |   |   |  |
|-------------|--------------------|-------------------------------------|---|---|--|
| Personal ▼  | john.doe@gmail.com | <input checked="" type="checkbox"/> | + | - |  |

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**Instant Message IDs** ?

🔍 1-1 of 1 View All

| *IM Protocol | *IM Domain | *Network ID | Preferred                |   |   |
|--------------|------------|-------------|--------------------------|---|---|
| ▼            |            |             | <input type="checkbox"/> | + | - |

Save
Return to Search
Previous in List
Next in List
Notify
Refresh
Update/Display
Include History

21. Run the **Employee Activity Report** for the employee using the following navigation path:

**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**

22. Print the report and place the printed transaction in the employee file for future audit requests.

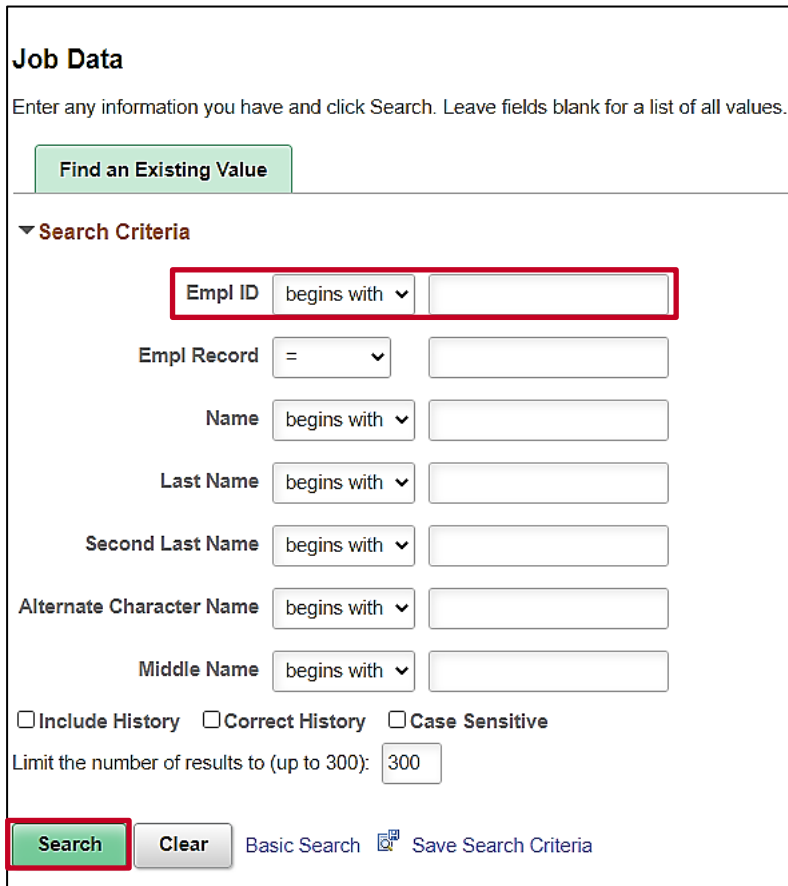
**Note:** For additional information on the Employee Activity Report and the steps used to run this report, refer to the **HCM Reports Catalog**. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

**Termination – Involuntary (except Layoff)**

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

**Navigator > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.

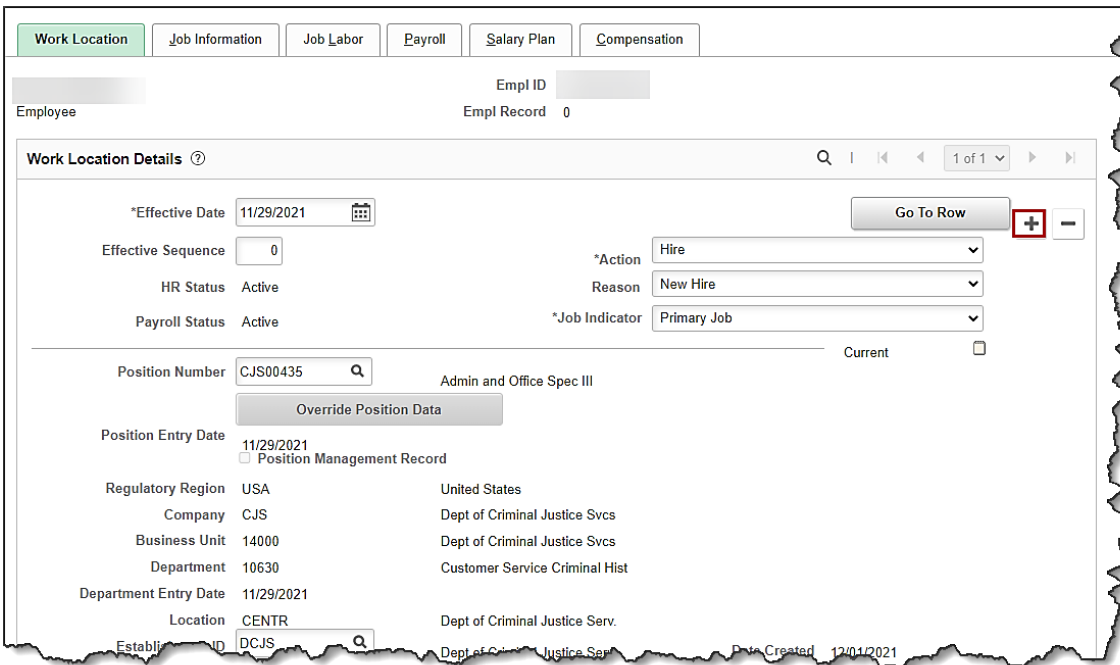


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by **Empl Record** or **Name** using the corresponding fields. However, it is recommended to use the **Employee ID** as it is a unique identifier for each employee.

3. Click the **Search** button.

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



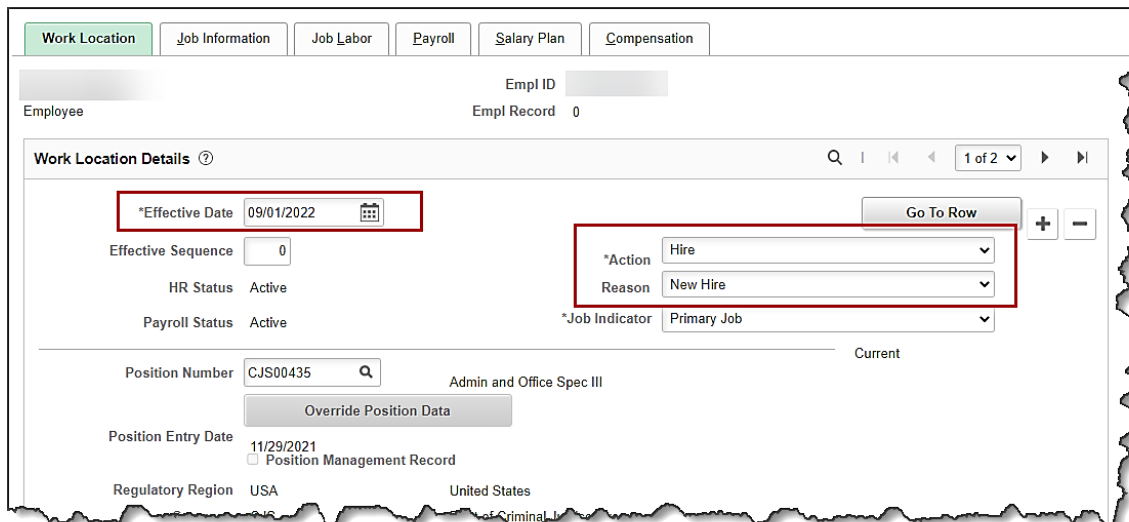
The screenshot shows the 'Work Location Details' form with the following fields and values:

- \*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
- Position: Admin and Office Spec III
- Position Entry Date: 11/29/2021
- Regulatory Region: USA
- Company: CJS
- Business Unit: 14000
- Department: 10630
- Location: CENTR
- Establishment ID: DCJS

The 'Go To Row' button with a plus sign (+) is highlighted with a red box.

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

The **Work Location** tab refreshes with a new effective dated row displayed.



The screenshot shows the 'Work Location Details' form with two rows. The first row has the following fields and values:

- \*Effective Date: 09/01/2022
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Action: Hire
- Reason: New Hire
- \*Job Indicator: Primary Job
- Position Number: CJS00435
- Position: Admin and Office Spec III
- Position Entry Date: 11/29/2021
- Regulatory Region: USA

The 'Effective Date' field and the 'Go To Row' button with a plus sign (+) are highlighted with red boxes.

**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

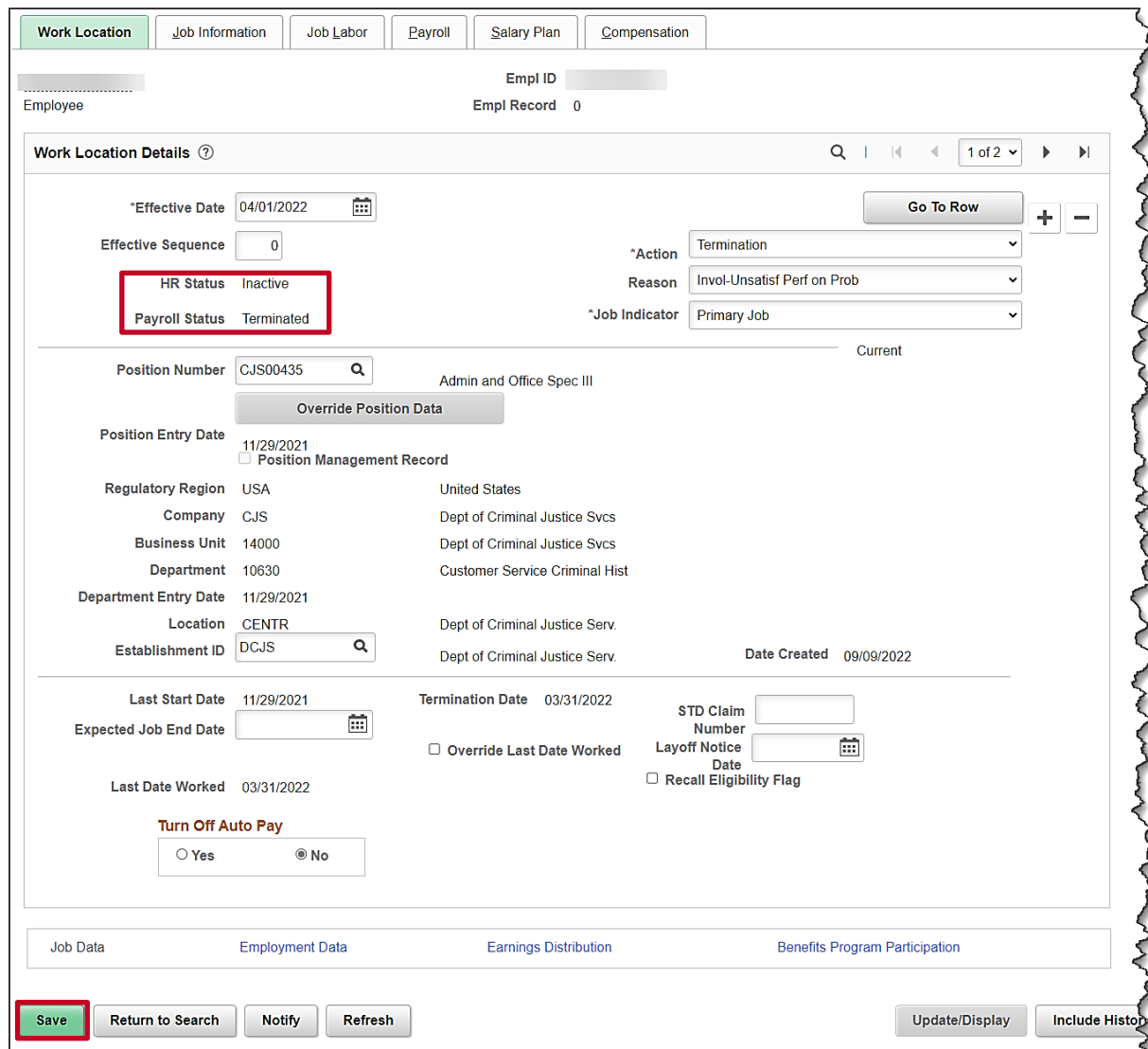
5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

**Note:** 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**.

6. Select the “**Termination**” option using the **Action** field dropdown button.
7. Select the applicable reason using the **Reason** field dropdown button.

**Note:** For further information on Action Reasons, see the Job Aid titled **HR351\_Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

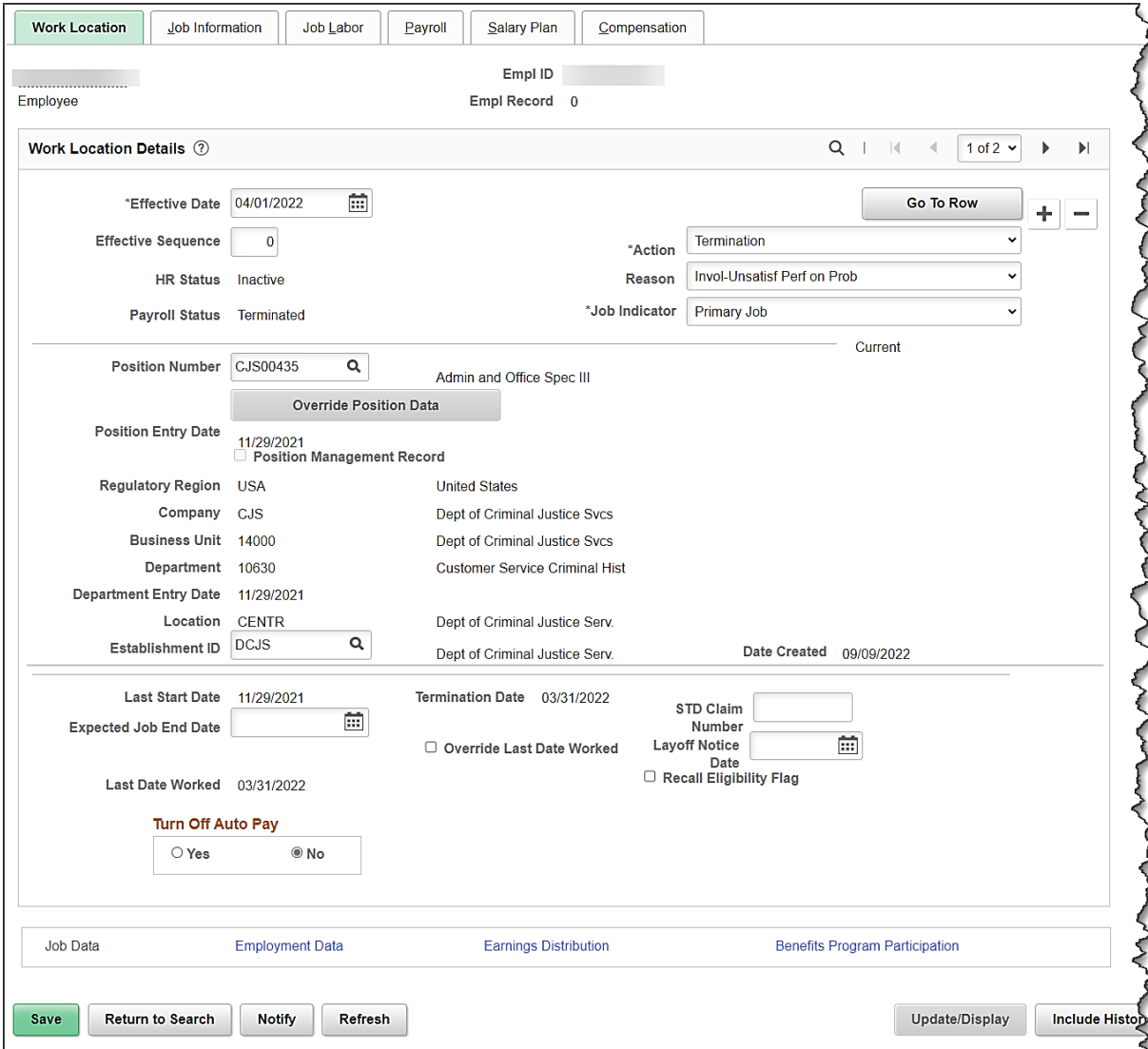
The **Job Data** page refreshes.



The screenshot shows a web-based form for HR351 Separation Statuses. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Work Location' tab is active. Below the tabs, there are fields for 'Empl ID' and 'Empl Record' (0). The main section is titled 'Work Location Details' and contains several fields and dropdowns. The 'Effective Date' is 04/01/2022. The 'Effective Sequence' is 0. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Terminated', both highlighted with a red box. The '\*Action' dropdown is set to 'Termination' and the 'Reason' dropdown is set to 'Invol-Unsatisf Perf on Prob'. The '\*Job Indicator' is 'Primary Job'. Below these are fields for '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). There are also fields for 'Last Start Date' (11/29/2021), 'Expected Job End Date', 'Last Date Worked' (03/31/2022), 'Termination Date' (03/31/2022), 'STD Claim Number', 'Layoff Notice Date', and 'Recall Eligibility Flag'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'. The 'Save' button is highlighted with a red box.

8. After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Terminated”.
9. Click the **Save** button.

The **Job Data** page returns.



The screenshot displays the 'Work Location' tab of a system interface. At the top, there are navigation tabs: 'Work Location' (selected), 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. Below these, the 'Employee' section shows 'Empl ID' and 'Empl Record 0'. The main area is titled 'Work Location Details' and contains several sections:

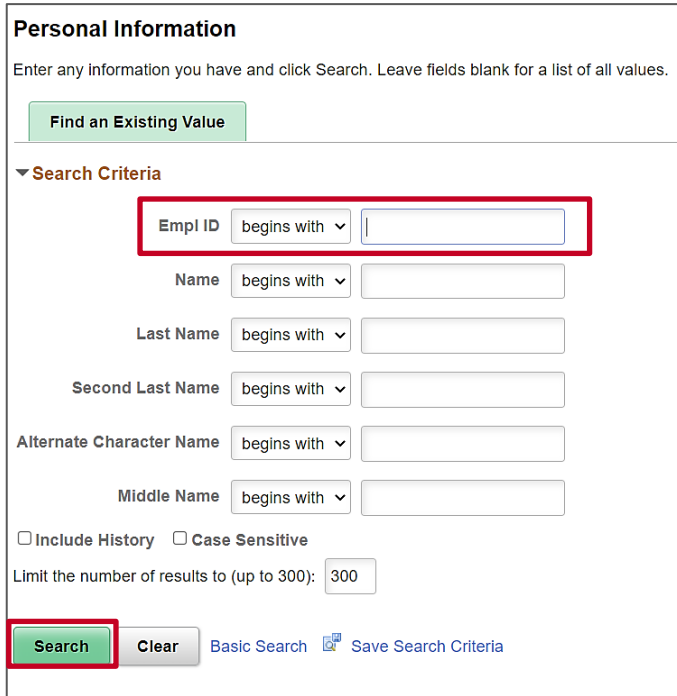
- Effective Date:** 04/01/2022
- Effective Sequence:** 0
- HR Status:** Inactive
- Payroll Status:** Terminated
- \*Action:** Termination
- Reason:** Invol-Unsatisf Perf on Prob
- \*Job Indicator:** Primary Job
- Position Number:** CJS00435 (Admin and Office Spec III)
- Position Entry Date:** 11/29/2021
- 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)
- Last Date Worked:** 03/31/2022
- Turn Off Auto Pay:** Yes (radio), No (radio, selected)

At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

- The employee's email address should be updated to a personal email in Personal Data. Navigate to the **Modify a Person** page using the following navigation:

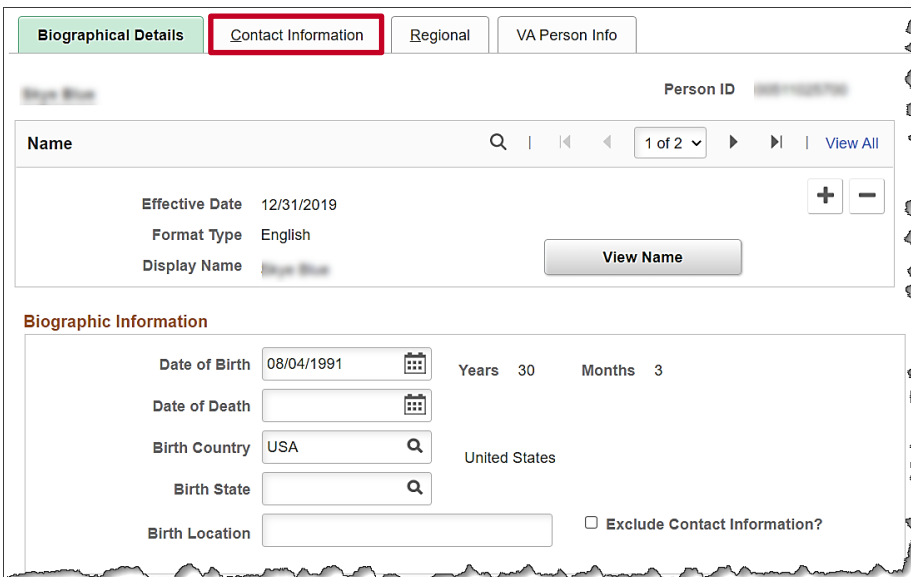
**Navigator > Workforce Administration > Personal Information > Modify a Person**

The **Modify a Person** search page displays.



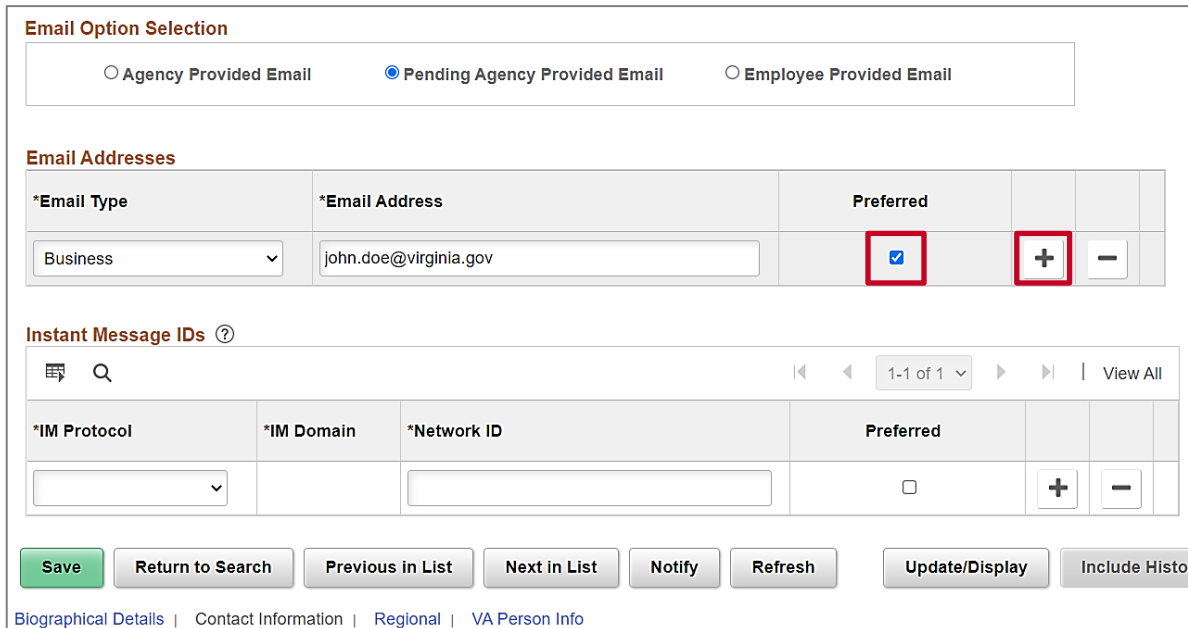
11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.



12. Click the **Contact Information** tab.

The **Contact Information** tab on the **Modify a Person** page displays.



**Email Option Selection**

Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

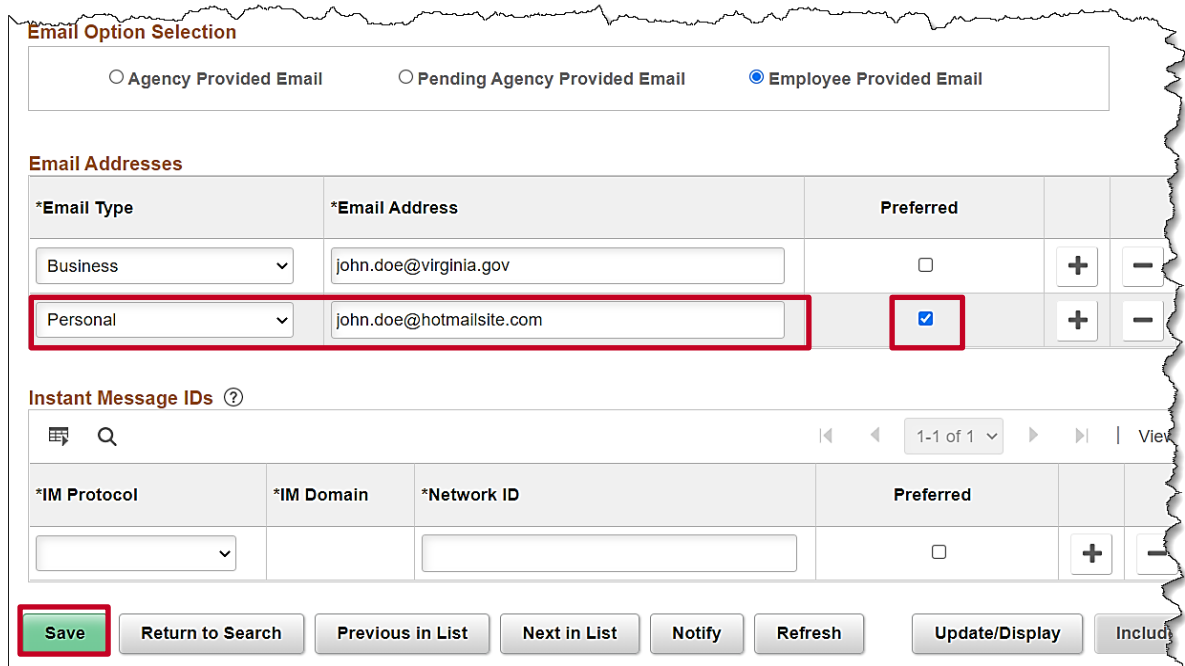
**Email Addresses**

| *Email Type | *Email Address        | Preferred                           |   |   |
|-------------|-----------------------|-------------------------------------|---|---|
| Business    | john.doe@virginia.gov | <input checked="" type="checkbox"/> | + | - |

**Instant Message IDs** ?

[Biographical Details](#) | 
 [Contact Information](#) | 
 [Regional](#) | 
 [VA Person Info](#)

13. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
14. Click the **Add a New Row** button to add a new email address.



**Email Option Selection**

Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

**Email Addresses**

| *Email Type | *Email Address        | Preferred                           |   |   |
|-------------|-----------------------|-------------------------------------|---|---|
| Business    | john.doe@virginia.gov | <input type="checkbox"/>            | + | - |
| Personal    | john.doe@hotmail.com  | <input checked="" type="checkbox"/> | + | - |

**Instant Message IDs** ?

15. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.
16. Click the **Save** button.



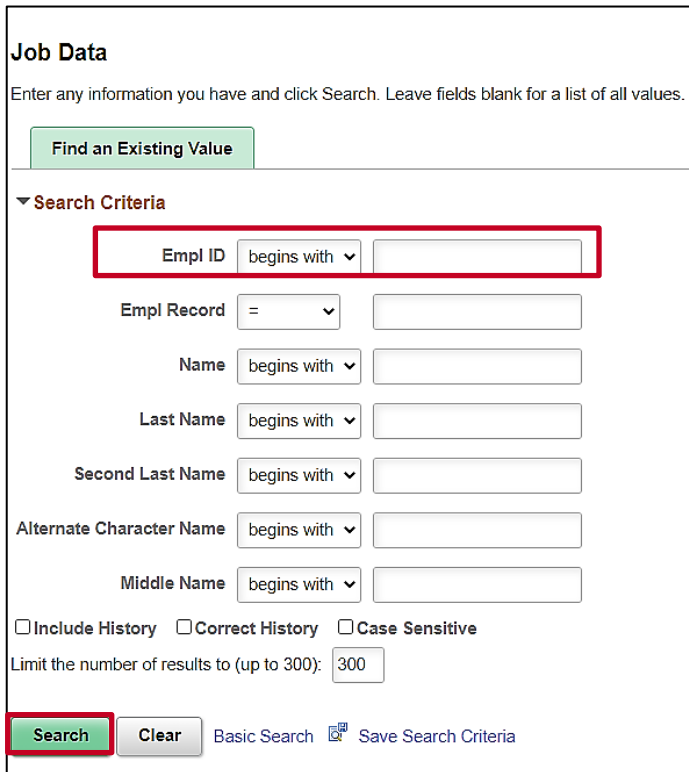
17. Run the **Employee Activity Report** for the employee, use the following navigation:  
**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**
18. Run the Employee Activity Report for the employee.  
**Note:** Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.
19. Print the report and place the printed transaction in the employee file for future audit requests.

**Retirement – VRS Retiree**

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

**Navigator > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.

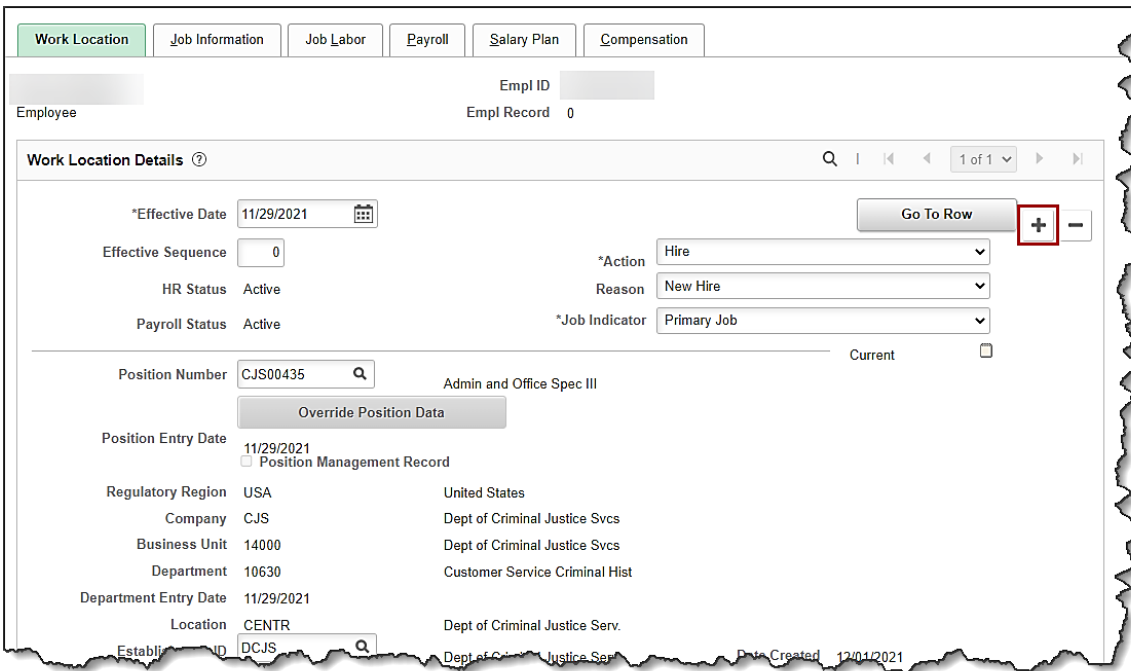


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

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

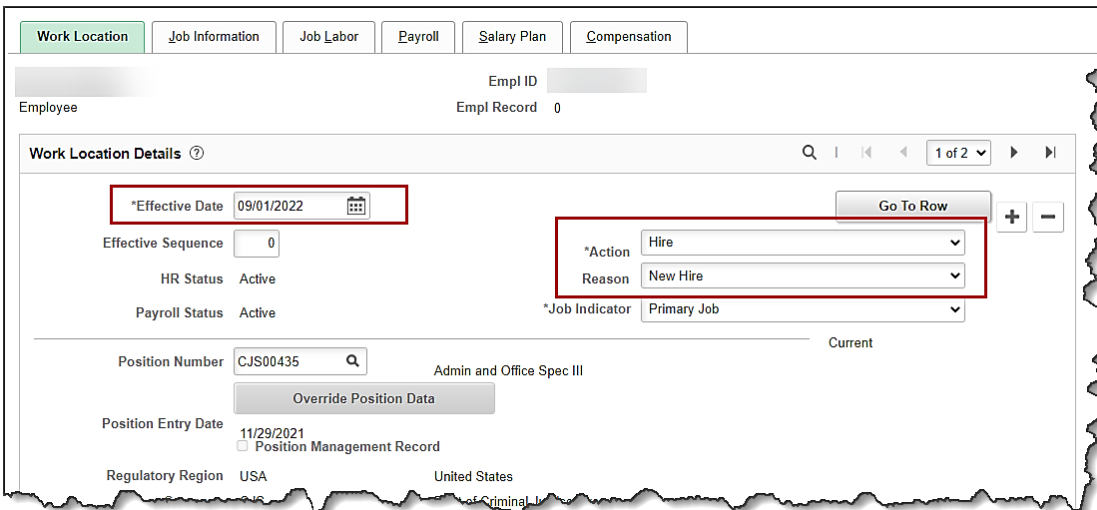


The screenshot shows the 'Work Location' tab selected. The 'Go To Row' button has a red box around the '+' icon, indicating where to click to add a new row. The form displays the following data:

|                       |            |   |                          |                          |
|-----------------------|------------|---|--------------------------|--------------------------|
| *Effective Date       | 11/29/2021 | Go To Row   | +                        | -                        |
| Effective Sequence    | 0          | *Action   | Hire                     |                          |
| HR Status             | Active     | Reason  | New Hire                 |                          |
| Payroll Status        | Active     | *Job Indicator                                      | Primary Job              |                          |
| Position Number       | CJS00435   | Admin and Office Spec III                           | Current                  | <input type="checkbox"/> |
| Position Entry Date   | 11/29/2021 | <input type="checkbox"/> Position Management Record |                          |                          |
| 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: 12/01/2021 |                          |

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

The **Work Location** tab refreshes with a new effective dated row displayed.



The screenshot shows the 'Work Location' tab after adding a new row. The 'Effective Date' field is now 09/01/2022, and the 'Action' and 'Reason' dropdowns are highlighted with red boxes. The 'Go To Row' button now shows a '+' and '-' icon. The form displays the following data:

|                       |            |   |                          |                          |
|-----------------------|------------|---|--------------------------|--------------------------|
| *Effective Date       | 09/01/2022 | Go To Row   | +                        | -                        |
| Effective Sequence    | 0          | *Action   | Hire                     |                          |
| HR Status             | Active     | Reason  | New Hire                 |                          |
| Payroll Status        | Active     | *Job Indicator                                      | Primary Job              |                          |
| Position Number       | CJS00435   | Admin and Office Spec III                           | Current                  | <input type="checkbox"/> |
| Position Entry Date   | 11/29/2021 | <input type="checkbox"/> Position Management Record |                          |                          |
| 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: 12/01/2021 |                          |

**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

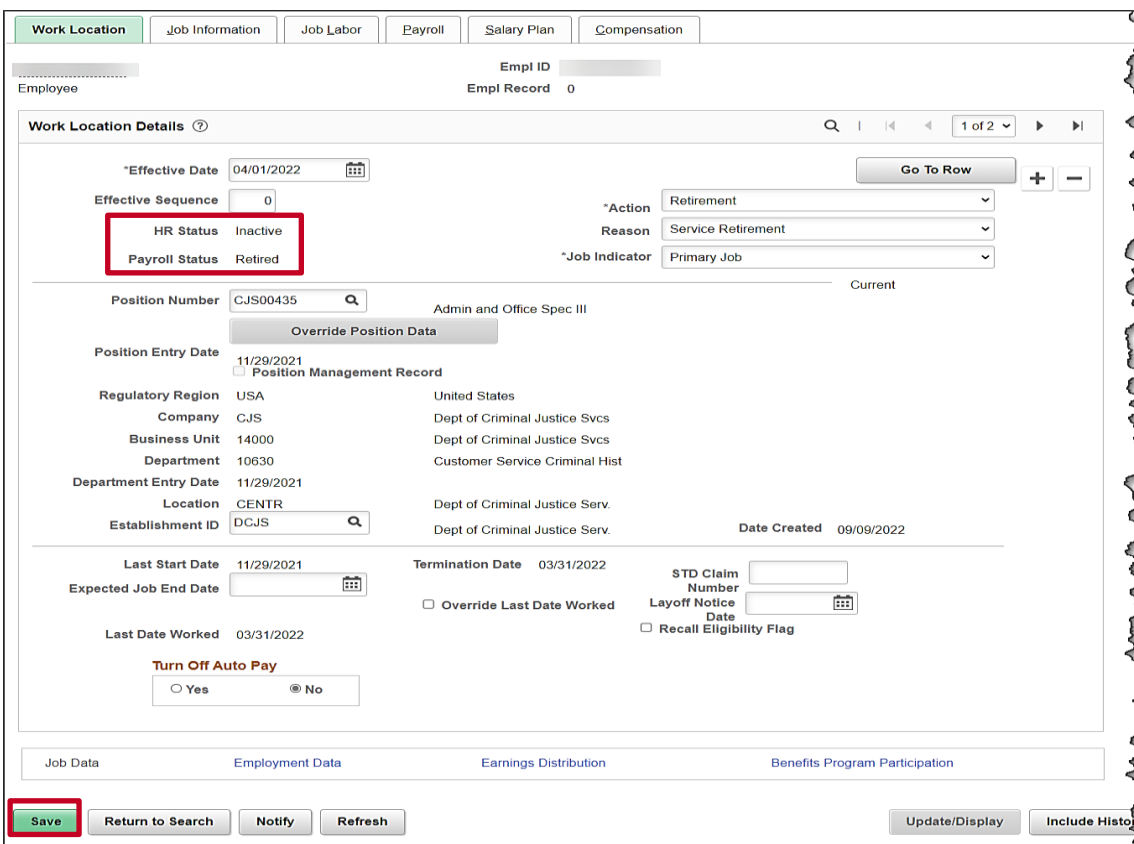
5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

**Note:** Set the effective date to be one day after the employee’s last day worked. If an employee’s last day is 03/31/2022, the effective date of the termination should be 04/01/2022. 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**.

6. Select the “**Retirement**” option using the **Action** field dropdown button.
7. Select the applicable reason using the **Reason** field dropdown button.

**Note:** For further information on Action Reasons, see the Job Aid titled **HR351\_Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The **Job Data** page refreshes.



8. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will automatically update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.
9. Click the **Save** button.
10. The employee’s email address should be updated to a personal email in Personal Data. Navigate to the **Modify a Person** page using the following navigation:

**Navigator > Workforce Administration > Personal Information > Modify a Person**

The **Modify a Person** search page displays.

**Personal Information**  
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   
Name begins with   
Last Name begins with   
Second Last Name begins with   
Alternate Character Name begins with   
Middle Name begins with   
 Include History  Case Sensitive  
Limit the number of results to (up to 300):   
[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

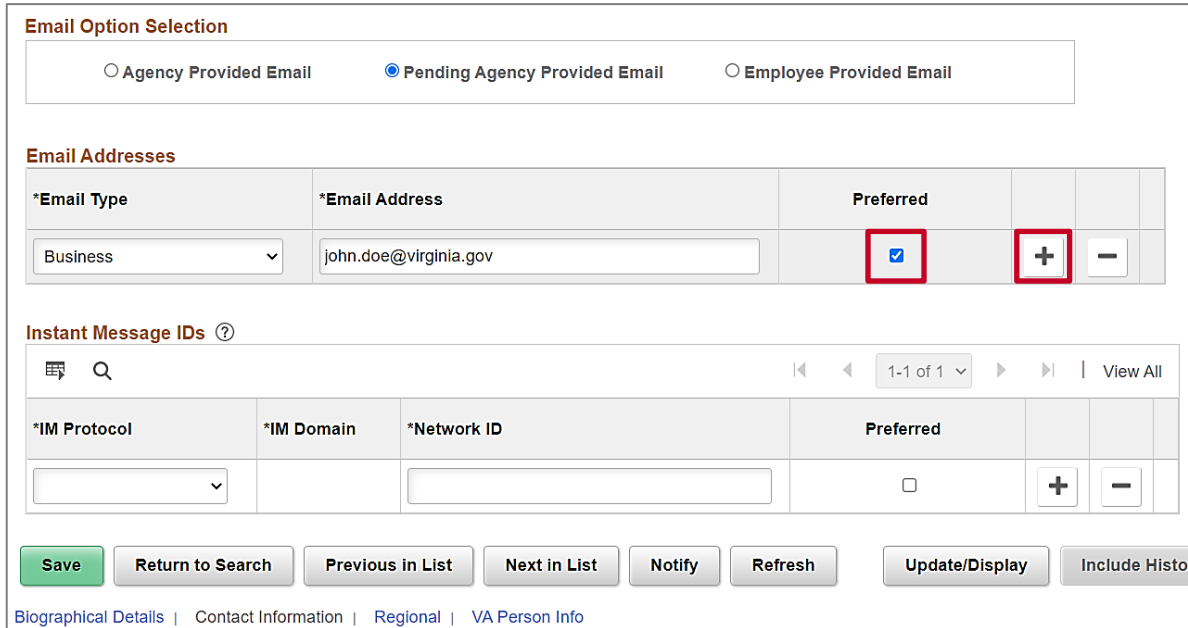
11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

The **Biographical Details** tab on the **Modify a Person** page displays.

**Biographical Details** **Contact Information** Regional VA Person Info  
Person ID [REDACTED]  
Name [REDACTED] 1 of 2 [View All](#)  
Effective Date 06/22/2021 [+](#) [-](#)  
Format Type English [View Name](#)  
Display Name [REDACTED]  
**Biographic Information**  
Date of Birth 12/23/1973   Years 48 Months 1  
Date of Death    
Birth Country USA   United States  
Birth State    
Birth Location   Exclude Contact Information?

12. Click the **Contact Information** tab.

The **Contact Information** tab on the **Modify a Person** page displays.



**Email Option Selection**

Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

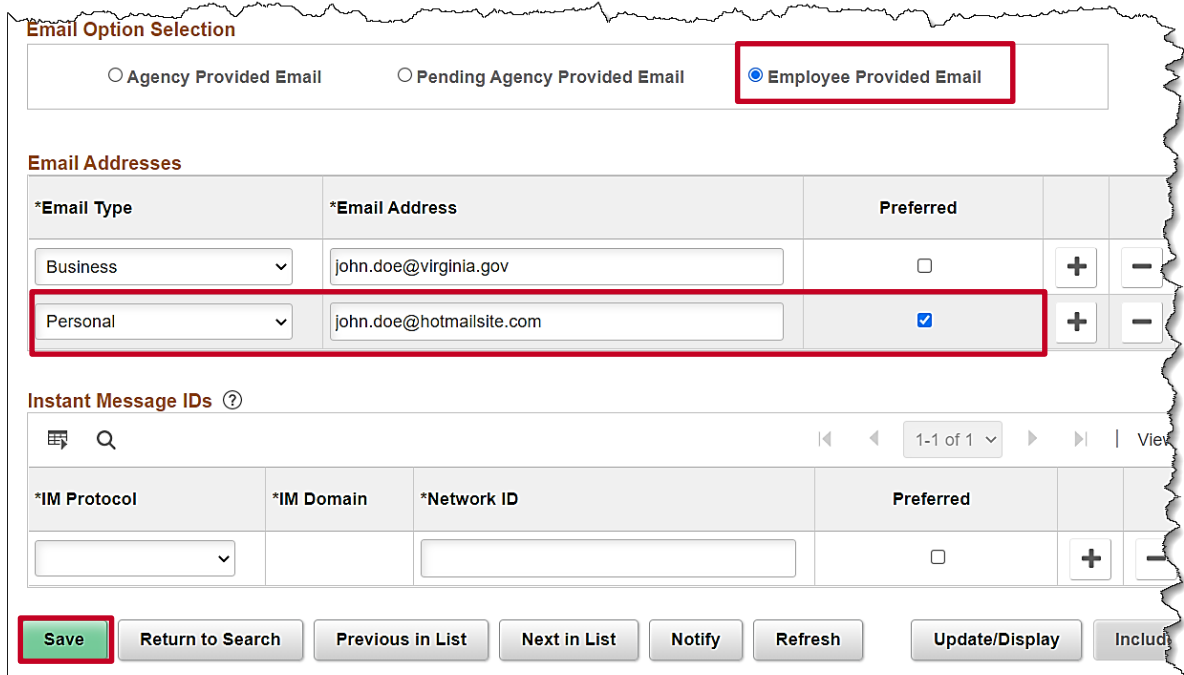
**Email Addresses**

| *Email Type | *Email Address        | Preferred                           |   |   |
|-------------|-----------------------|-------------------------------------|---|---|
| Business    | john.doe@virginia.gov | <input checked="" type="checkbox"/> | + | - |

**Instant Message IDs** ?

[Biographical Details](#) | 
 [Contact Information](#) | 
 [Regional](#) | 
 [VA Person Info](#)

13. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
14. Click the **Add a New Row** button to add a new email address.



**Email Option Selection**

Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

**Email Addresses**

| *Email Type | *Email Address        | Preferred                           |   |   |
|-------------|-----------------------|-------------------------------------|---|---|
| Business    | john.doe@virginia.gov | <input type="checkbox"/>            | + | - |
| Personal    | john.doe@hotmail.com  | <input checked="" type="checkbox"/> | + | - |

**Instant Message IDs** ?

15. Select **Personal** from the drop down menu in the **Email Type** field.
16. Enter the employee's personal email address in the **Email Address** field.
17. Check the **Preferred** checkbox.

18. Click the **Save** button.

**Note:** VRS will now hire VRS eligible employees into the VRS Retirement position.

19. To run the **Employee Activity Report** for the employee, use the following navigation:

**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**

20. Print the report and place the printed transaction in the employee file for future audit requests.

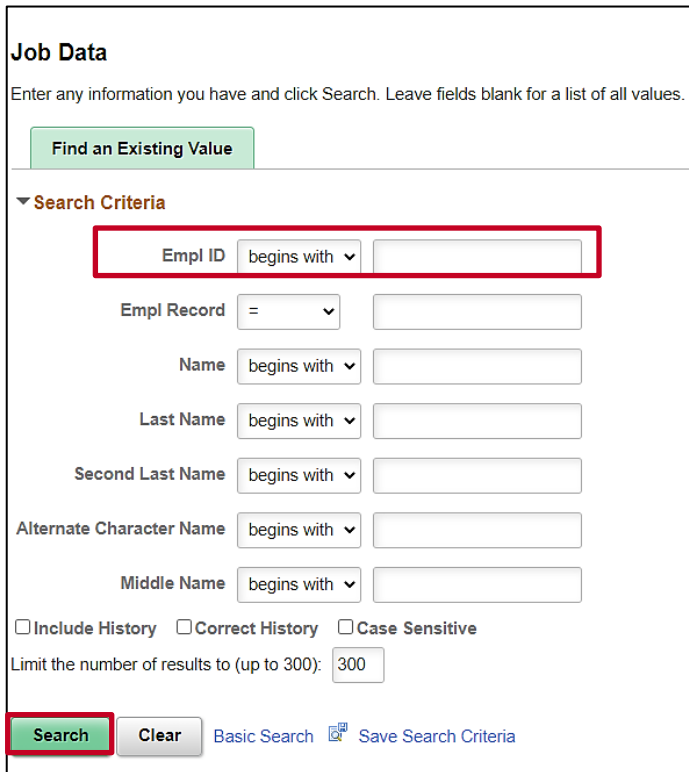
**Note:** Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

**Retirement – ORP Retiree**

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

**Navigator > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.



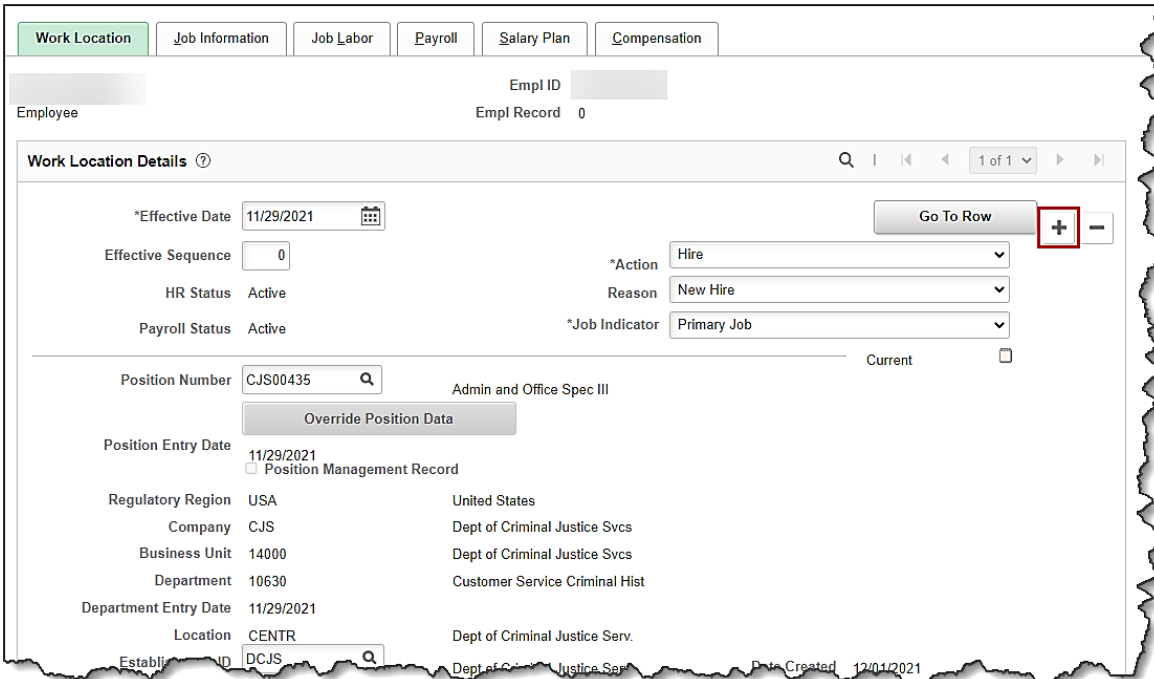
2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.



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



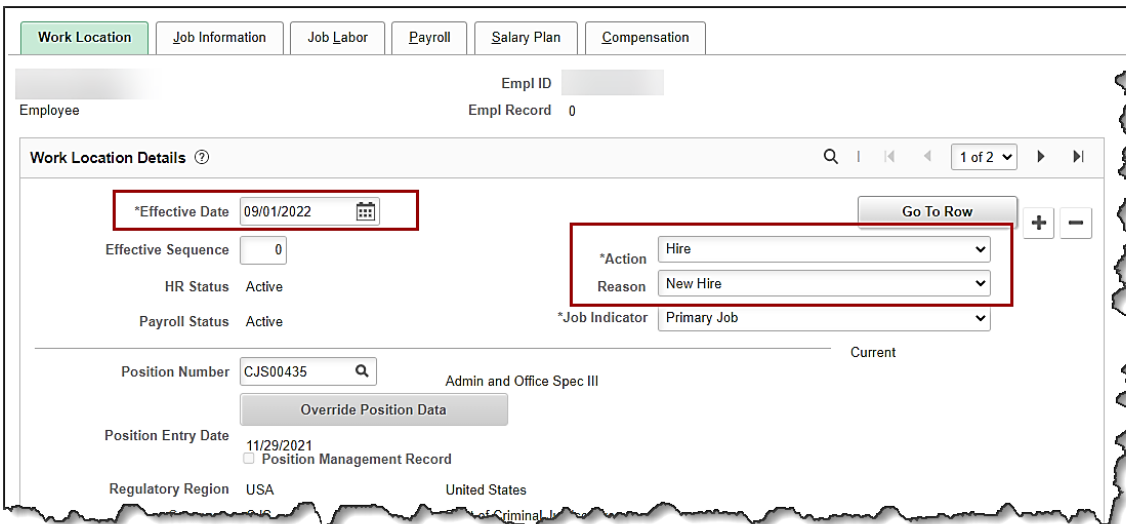
The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section contains the following fields:

- \*Effective Date: 11/29/2021 (with a calendar icon)
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Action: Hire
- Reason: New Hire
- \*Job Indicator: Primary Job
- Position Number: CJS00435 (with a search icon)
- Position Entry Date: 11/29/2021 (with a checkbox for 'Position Management Record')
- Regulatory Region: USA
- Company: CJS
- Business Unit: 14000
- Department: 10630
- Location: CENTR
- Establishment ID: DCJS

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

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

The **Work Location** tab 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 new row has the following fields:

- \*Effective Date: 09/01/2022 (with a calendar icon)
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Action: Hire
- Reason: New Hire
- \*Job Indicator: Primary Job

Red boxes highlight the new row's 'Effective Date' field and the 'Action' and 'Reason' dropdowns.

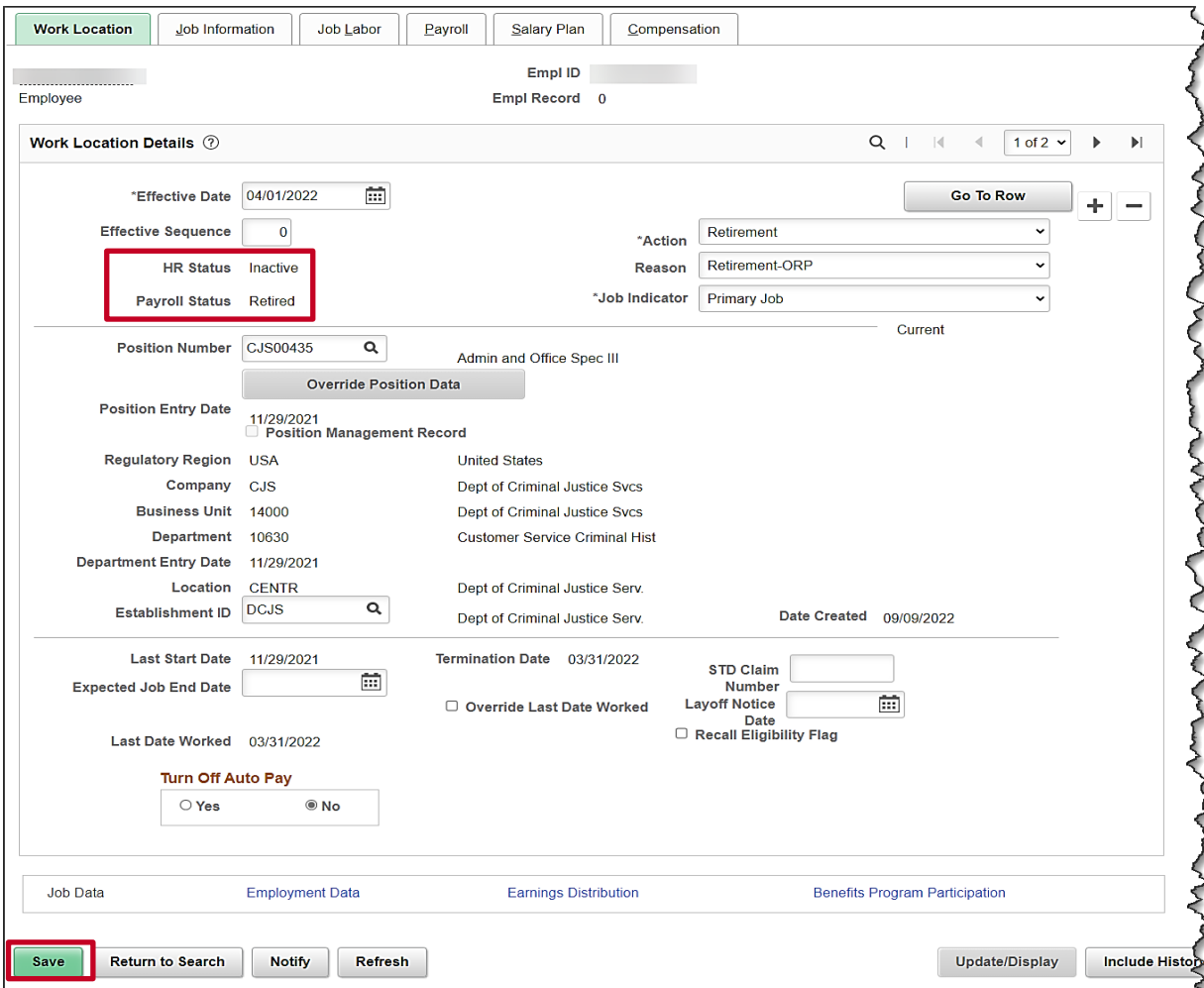
**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

**Note:** Set the effective date to be one day after the employee's last day worked. If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. 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**.

6. Select the “**Retirement**” option using the **Action** field dropdown button.
7. Select the “**Retirement – ORP**” using the **Reason** field dropdown button.

The **Job Data** page refreshes.



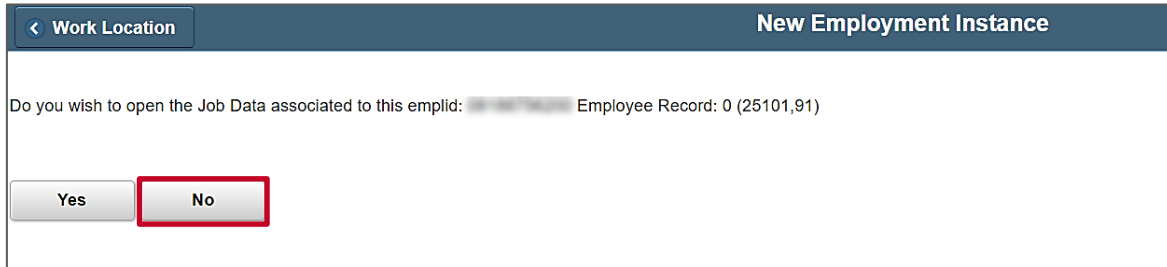
The screenshot shows a web form for separating an employee. At the top, there are tabs for 'Work Location', 'Job Information', 'Job Labor', 'Payroll', 'Salary Plan', and 'Compensation'. The 'Work Location' tab is active. Below the tabs, there are fields for 'Empl ID' and 'Empl Record'. The main section is titled 'Work Location Details' and contains several fields and dropdowns. The 'Effective Date' is 04/01/2022. The 'Effective Sequence' is 0. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Retired'. The 'Action' dropdown is set to 'Retirement' and the 'Reason' dropdown is set to 'Retirement-ORP'. The 'Job Indicator' is 'Primary Job'. Below these fields, there are sections for '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). There are also fields for 'Last Start Date' (11/29/2021), 'Termination Date' (03/31/2022), 'Expected Job End Date', and 'Last Date Worked' (03/31/2022). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

8. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will automatically update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.
9. Click the **Save** button.
 

**Note:** Now the agency HR Administrator should hire the employee into the ORP retirement position using a new employment instance.

10. Navigate to **New Employment Instance** page using this path:

**Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance**

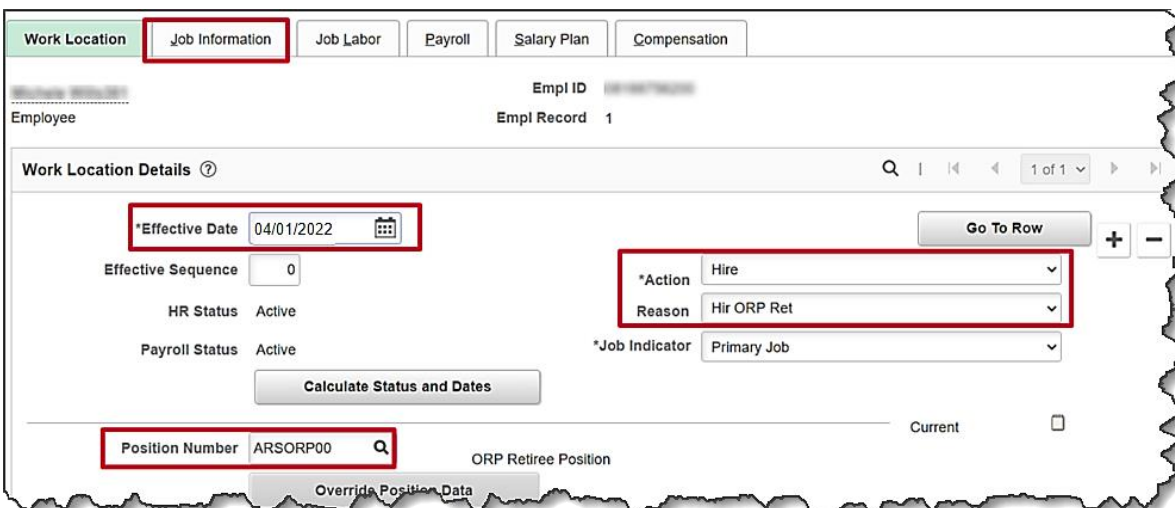


11. Answer **No**, to the question “Do you wish to open the Job Data associated to this emplid:...”



12. Click the **Add Relationship** button to add job information for the new employee record.

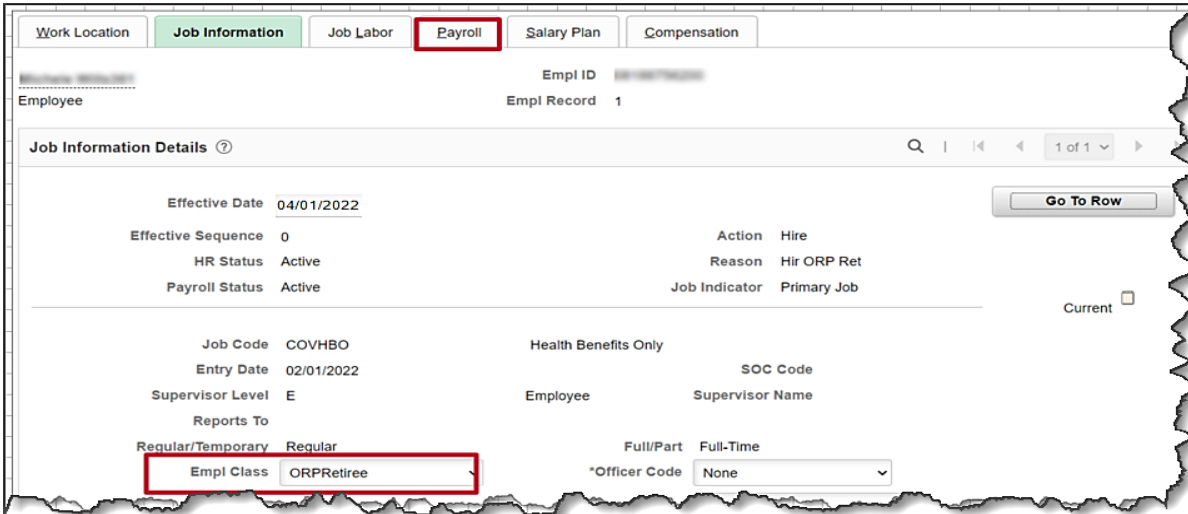
The new Job Record is displayed.



13. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

14. The **Action** field defaults to **Hire**.

15. In the **Reason** field select **Hir ORP Ret.**
16. Locate the ORP position for your agency using the **Position Number** search icon.  
**Note:** Enter **%ORP** to search for the ORP position number.
17. Click the **Job Information** tab.



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

Employee ID: [Redacted] Empl Record: 1

**Job Information Details**

Effective Date: 04/01/2022

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Hire

Reason: Hir ORP Ret

Job Indicator: Primary Job

Job Code: COVHBO

Entry Date: 02/01/2022

Supervisor Level: E

Reports To: [Redacted]

Regular/Temporary: Regular

Empl Class: **ORPRetiree**

Health Benefits Only

SOC Code

Employee: [Redacted]

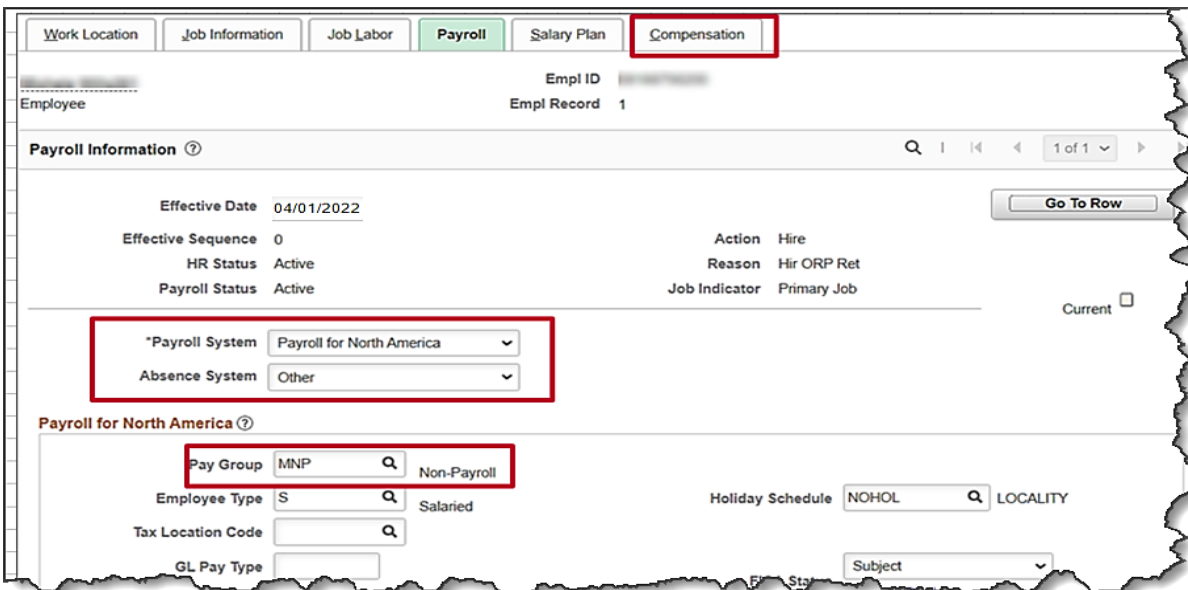
Supervisor Name

Full/Part: Full-Time

\*Officer Code: None

Current

18. Select the **ORPRetiree** in the **Empl Class** field.
19. Click the **Payroll** tab.



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

Employee ID: [Redacted] Empl Record: 1

**Payroll Information**

Effective Date: 04/01/2022

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

Action: Hire

Reason: Hir ORP Ret

Job Indicator: Primary Job

\*Payroll System: Payroll for North America

Absence System: Other

Current

**Payroll for North America**

Pay Group: MNP

Employee Type: S

Tax Location Code: [Redacted]

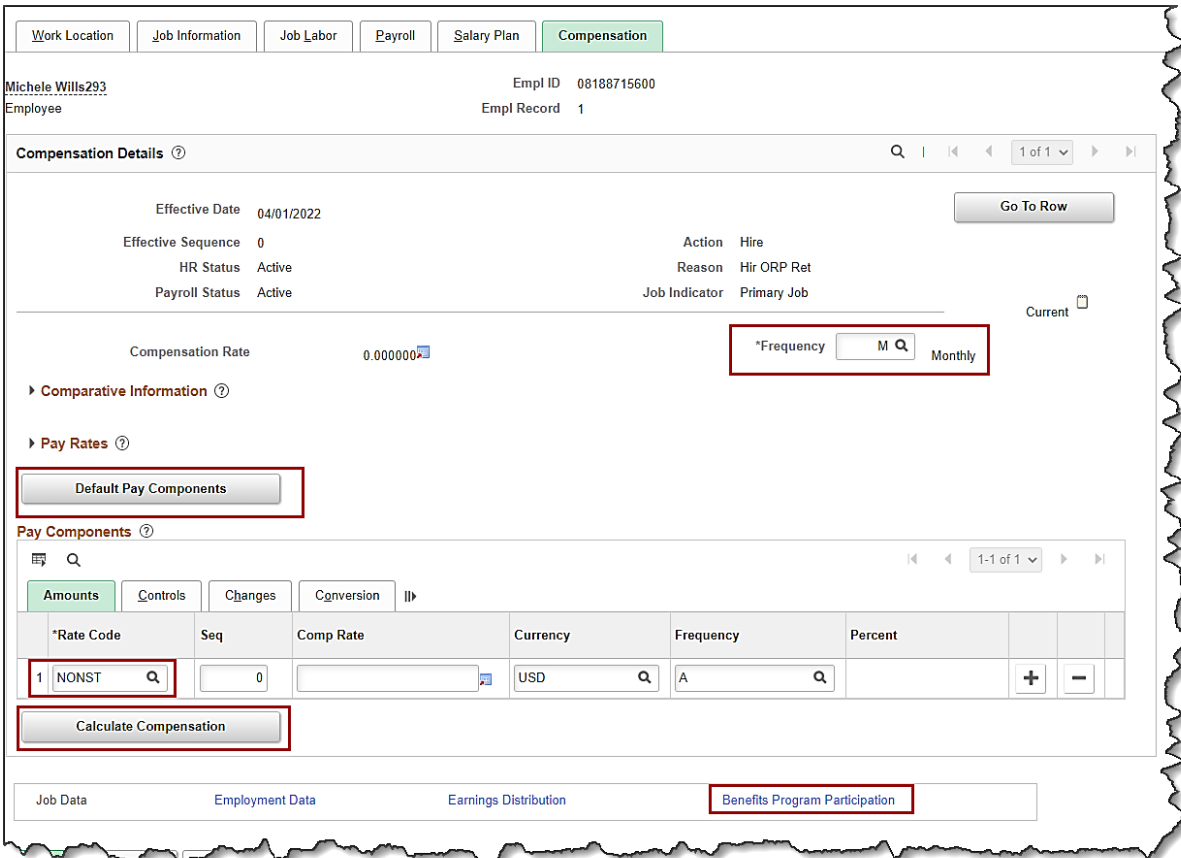
GL Pay Type: [Redacted]

Holiday Schedule: NOHOL

LOCALITY

Subject: [Redacted]

20. The **Payroll System** defaults to **Payroll for North America**. Do not change.
21. The **Absence System** defaults to **Other**. Do not change.
22. Select **MNP** in the Pay Group field. This is the Non-Payroll pay group.
23. Click the **Compensation** tab.



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

Michele Wills293  
Employee

Empl ID 08188715600  
Empl Record 1

**Compensation Details** ②

Effective Date 04/01/2022

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason Hir ORP Ret

Job Indicator Primary Job

Go To Row

Compensation Rate 0.000000

\*Frequency M Monthly

Comparative Information ②

Pay Rates ②

Default Pay Components

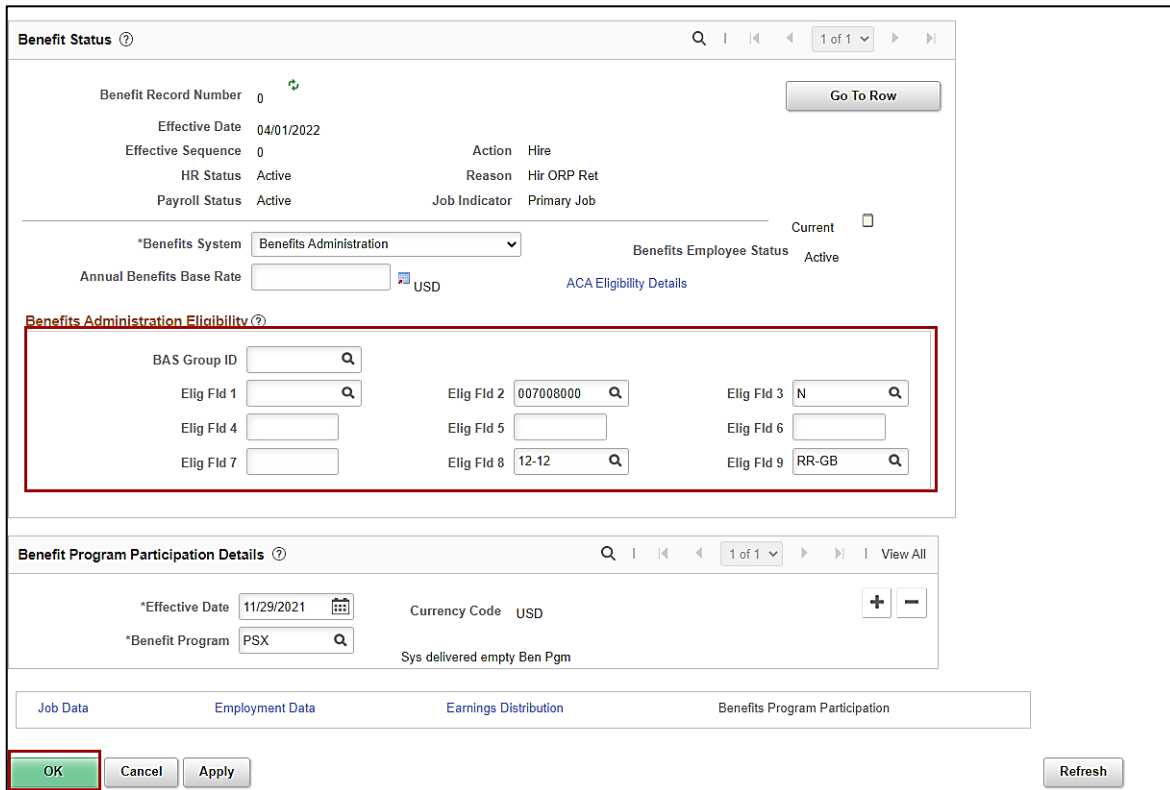
**Pay Components** ②

| Amounts    | Controls | Changes   | Conversion |           |         |
|------------|----------|-----------|------------|-----------|---------|
| *Rate Code | Seq      | Comp Rate | Currency   | Frequency | Percent |
| 1 NONST    | 0        |           | USD        | A         |         |

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | **Benefits Program Participation**

24. Change the **Frequency** from **A** to **M**.
25. Click the **Defaults Pay Components** button.
26. No additional **Pay Component** fields should be entered. Click the **Calculate Compensation** button.
27. Click the **Benefits Program Participation** link.



**Benefit Status** ?

Benefit Record Number 0

Effective Date 04/01/2022

Effective Sequence 0 Action Hire

HR Status Active Reason Hir ORP Ret

Payroll Status Active Job Indicator Primary Job

---

\*Benefits System  Current

Annual Benefits Base Rate  USD Benefits Employee Status Active

[ACA Eligibility Details](#)

**Benefits Administration Eligibility** (?)

BAS Group ID

Elig Fld 1

Elig Fld 2 007008000

Elig Fld 3 N

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8 12-12

Elig Fld 9 RR-GB

---

**Benefit Program Participation Details** ?

\*Effective Date 11/29/2021   Currency Code USD

\*Benefit Program  Sys delivered empty Ben Pgm

Job Data Employment Data Earnings Distribution Benefits Program Participation

28. Use the **Configuration Workbook** to complete **Eligibility Fields 2, 3, 8 & 9** based on the appropriate scenarios for the ORP Retiree.
29. Click the **Save** button.
30. To run the Employee Activity Report for the employee, use the following navigation:  
**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**
31. Run the Employee Activity Report for the employee.  
**Note:** Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.
32. Print the report and place the printed transaction in the employee file for future audit requests.