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, or legislation can initiate communication to the appropriate Agency HR staff regarding the need for a change. Every agency has its own approval process that must be completed before making the appropriate changes in the Cardinal system. Agencies utilize agency-specific systems or paper forms to route request through their approval process. No approval is included in the Cardinal system.

An Agency head, supervisor, or employee may submit documentation for a separation. The type of separation determines the required documentation that should be submitted to Agency HR. Agency HR will examine the nature of the separation and work with the appropriate personnel to complete the appropriate documentation.

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

Involuntary

Termination: Termination is an employee's involuntary separation from state service, but does not include separation as a result of layoff. Examples include Standards of Conduct, Unsatisfactory Performance during Probationary Period, and 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

Voluntary and Involuntary separations are keyed to inactivate the employee record. Action/Action Reasons are used to reflect the type of separation. In Cardinal, both Voluntary and Involuntary Separations use the Action of “Termination”; HR staff must reference the applicable Action Reason in order to identify correct cause of separation.

All HR 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 not create a paysheet for the employee.

Separation Statuses (continued)

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**.

Agency HR must coordinate with Agency Payroll and Agency Benefits Administrator (BA) for final pay, (e.g., salary, OT, leave payout) due the employee. Additional steps may be needed to create 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**.

In Cardinal, the **Effective date** of a termination is the calendar date directly after the last day worked. For example, if the employee last worked on Friday, the **Termination Effective Date** will be Saturday, as it is the calendar date directly after the last day worked.

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.

Future dated rows may be entered online if the effective dates are known for the status updates.

Link the employee to the Termination checklist to guide the user through the COVA Termination tasks to complete. For further information on Cardinal Checklists see the Job Aid titled **HR351 Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The employee email address must be updated in Cardinal after separation in order for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. The HR Administrator obtains the personal email address and updates the email address in Cardinal from Agency Provided to Employee Provided. Agency HR must also check the personal email address as Preferred. Selecting this email address as preferred is the driving factor for post-employment system access. Separated employees will then have access to Cardinal for 18 months after the Termination Date. After 18 months, this access ends automatically. Agency HR does not need to go back in and remove the personal email address.

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 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**.

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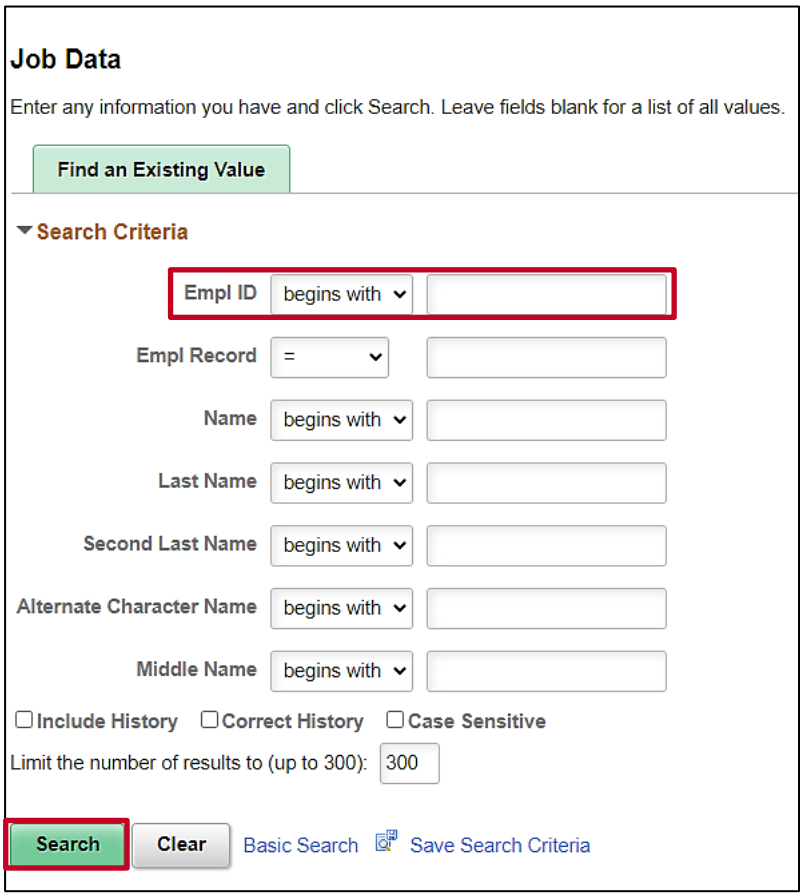
Termination – Voluntary

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

   Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

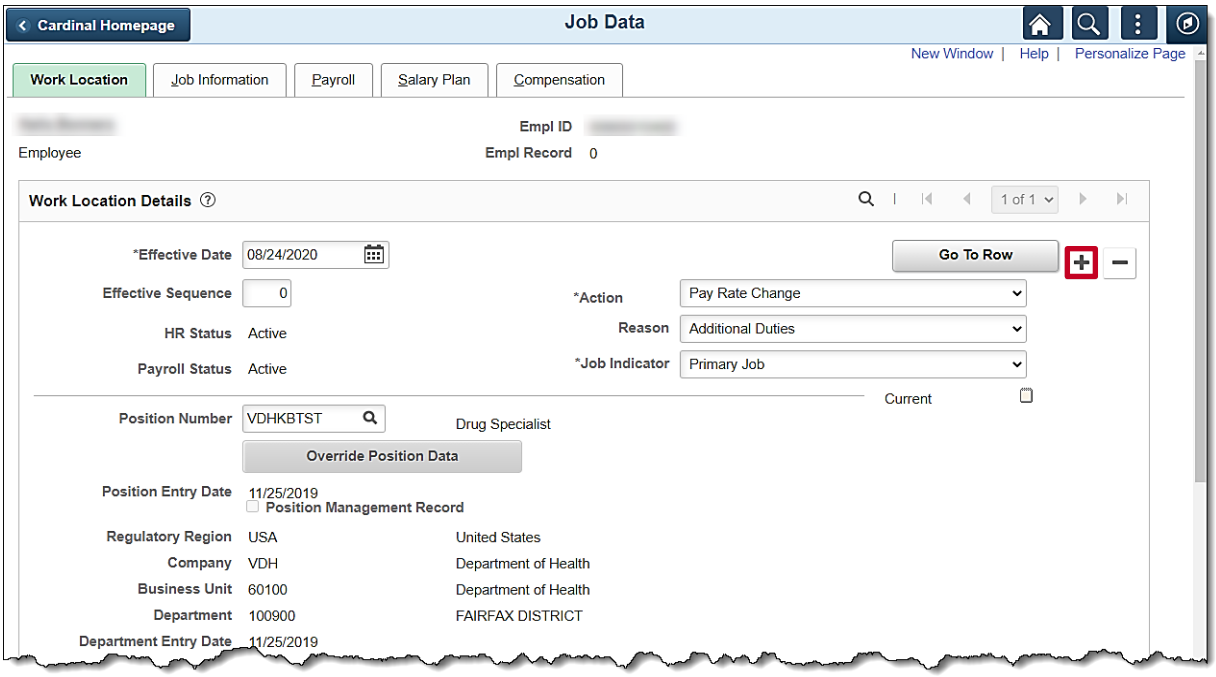


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

   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.

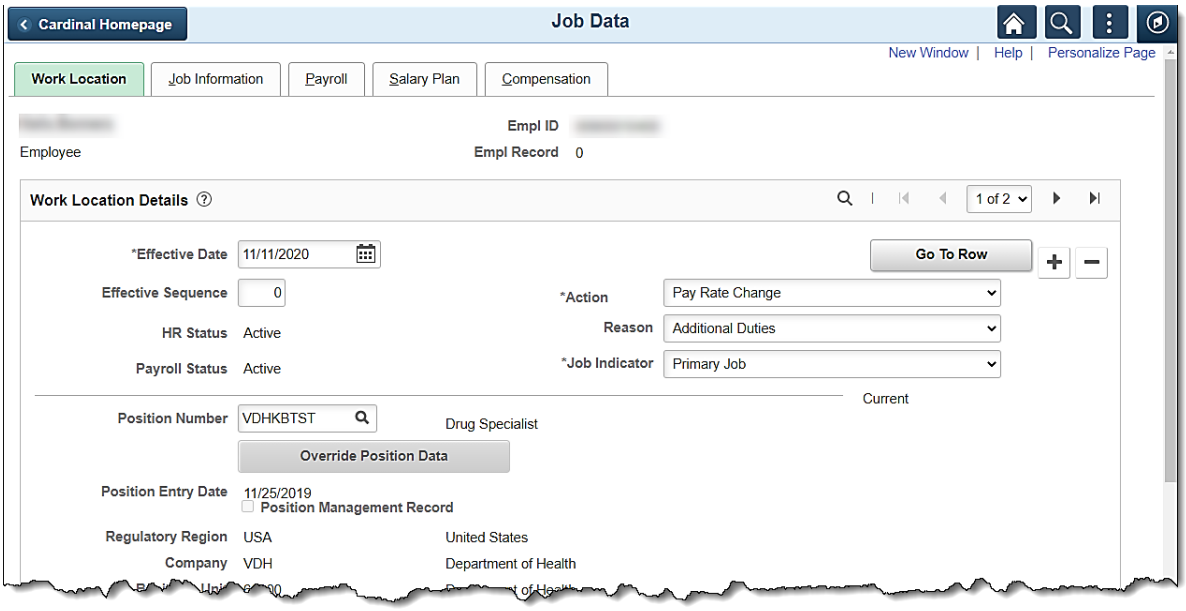
3. Click the **Search** button.

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



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.



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**.

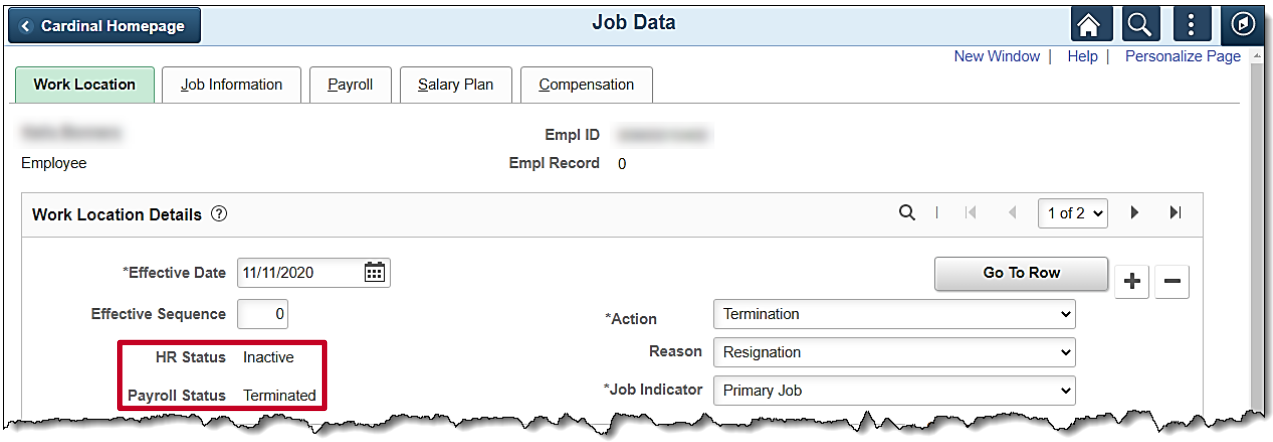
6. Select the "**Termination**" option using the **Action** field dropdown button.

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.

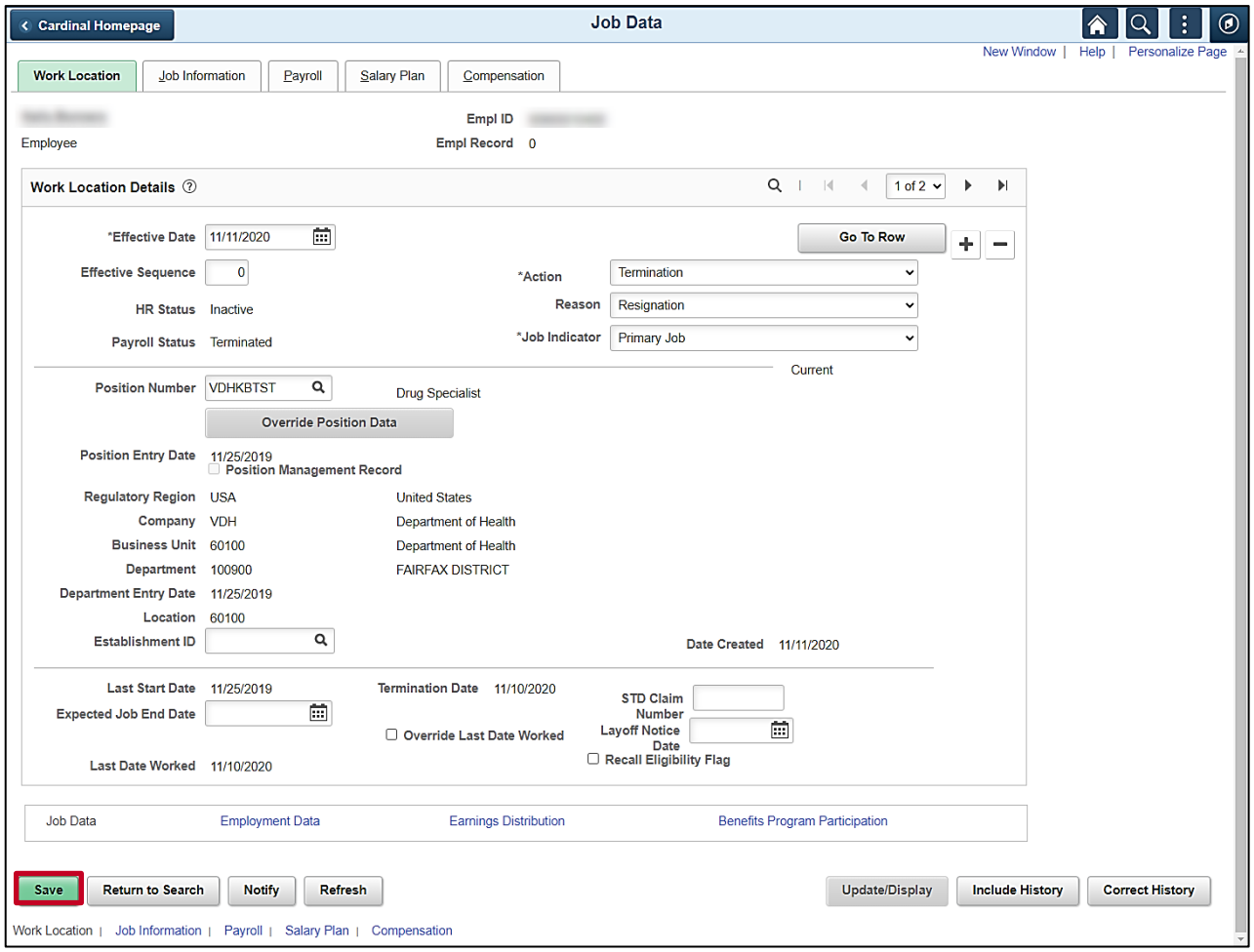
   For further information on Action Reasons, see the Job Aid titled **HR351 Action/Action Reasons**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The **Job Data** page refreshes.



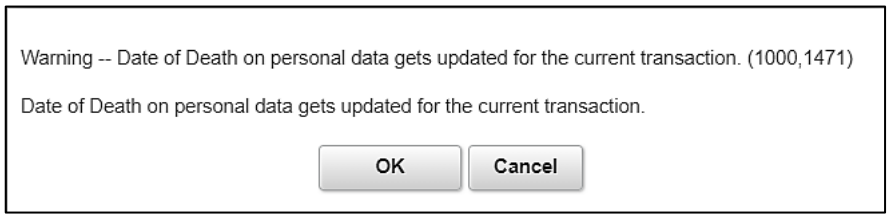
8. After selecting the Action and Action Reason, the **HR Status** and **Payroll Status** fields automatically update. Validate that the HR status displays as "Inactive" and the Payroll status displays as "Terminated".

The **Job Data** page returns.



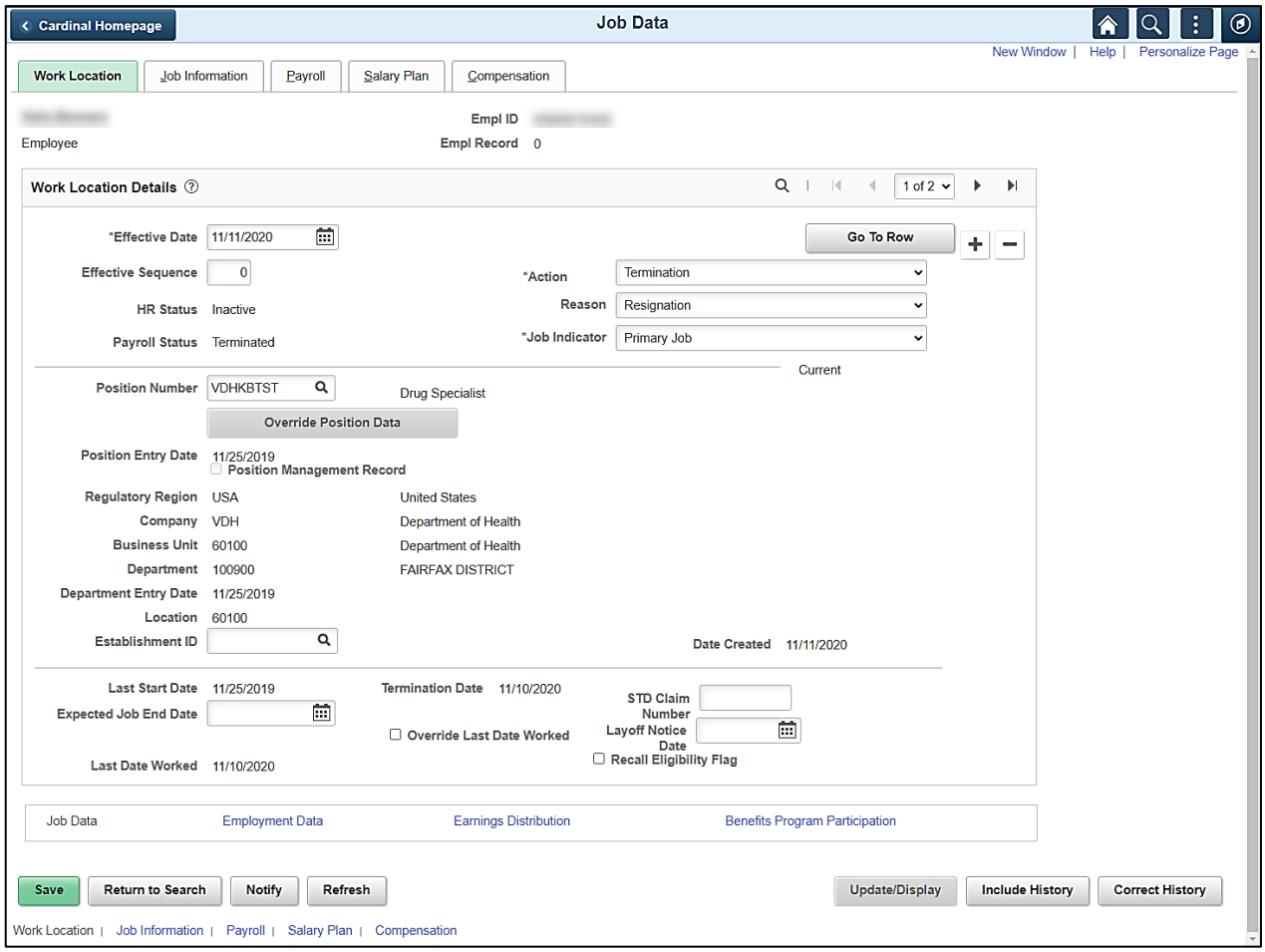
9. Click the **Save** button.

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.



10. Click the **OK** button.

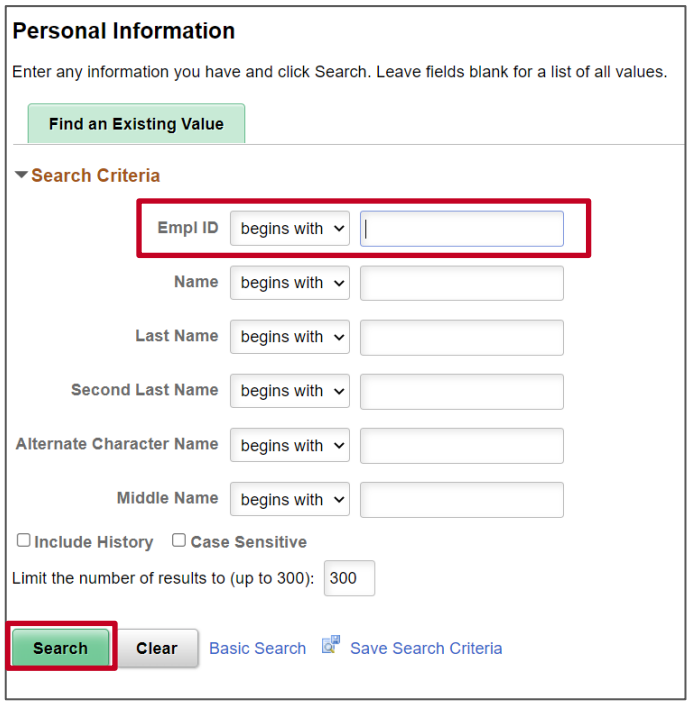
The **Job Data** page returns.



11. 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:

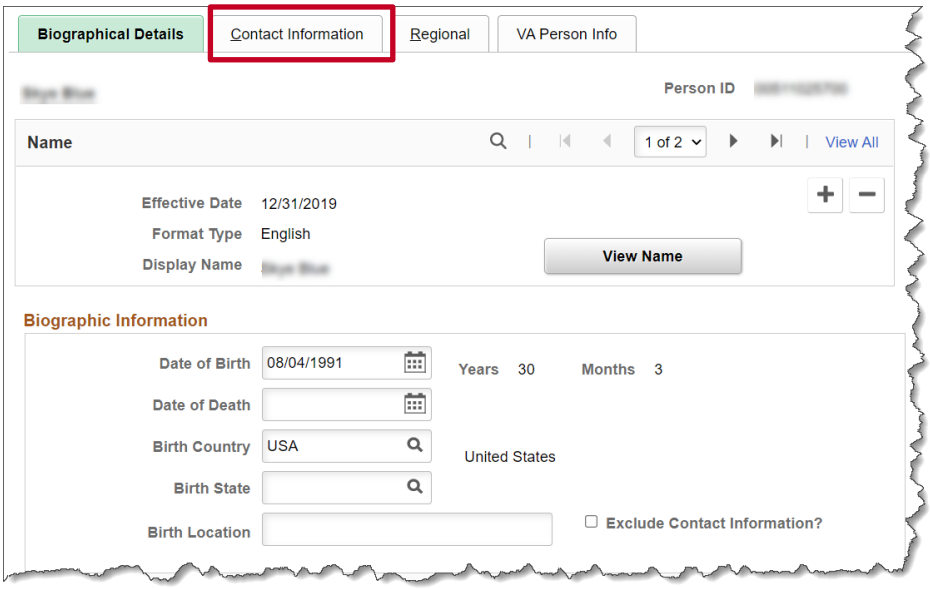
    Navigator > Workforce Administration > Personal Information > Modify a Person

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



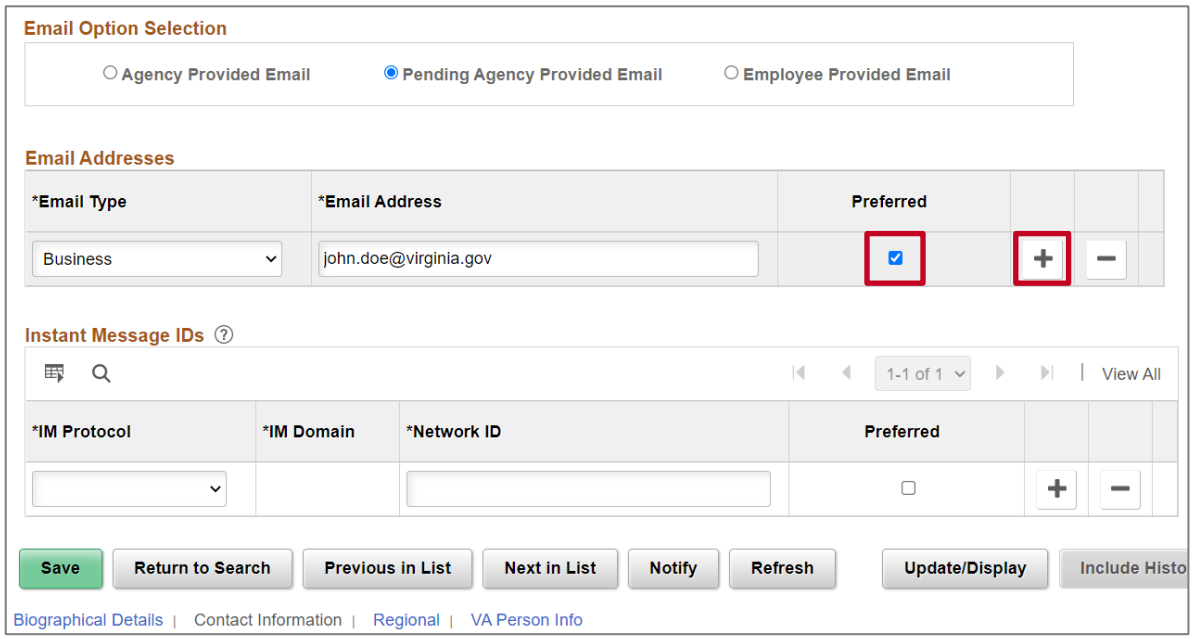
12. Enter the employee ID in the **Employee ID** field and click the **Search** button.

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

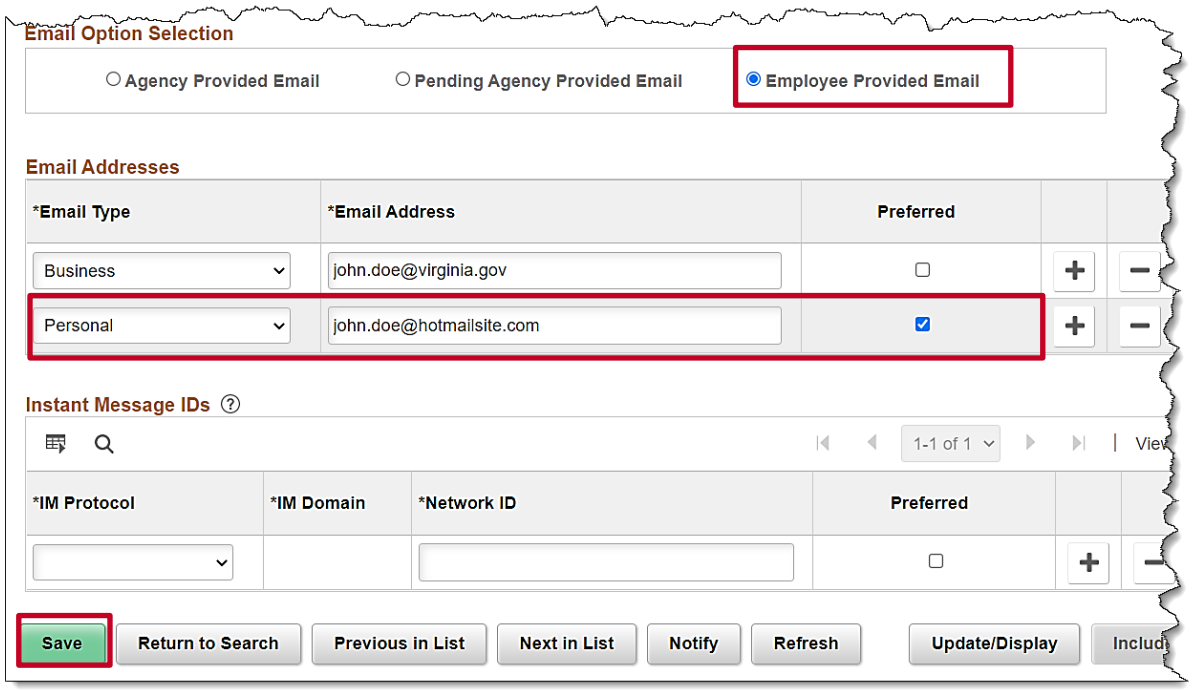


13. Click the **Contact Information** tab.

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



14. Scroll down to the **Email Addresses** section. Uncheck the **Preferred** checkbox from the business email address.
15. Click the **Add a New Row** button to add a new email address.
16. Select **Personal** from the **Email Type** field, enter the personal email address in the **Email Address** field and check the **Preferred** checkbox.



17. Click the **Save** button.
18. To run the Employee Activity Report for the employee, use the following navigation:

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

19. Run the Employee Activity Report for the employee.

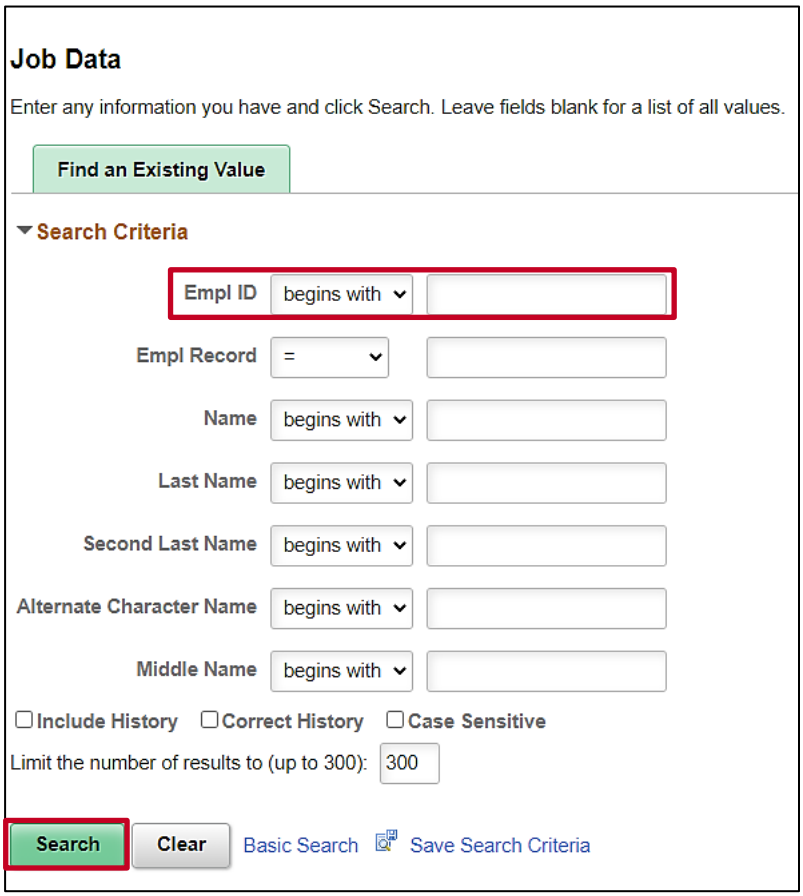
    Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the **HCM Reports Catalog.** The HCM Reports Catalog can be found on the Cardinal website under **Resources.** Print the report and place the printed transaction in the employee file for future audit requests.

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.

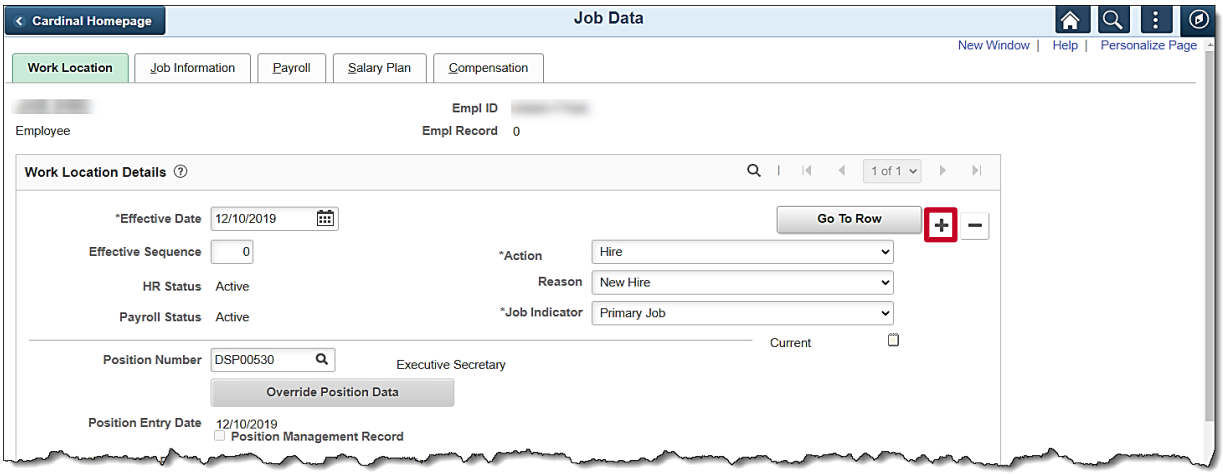


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

   Note: You can also search by 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.

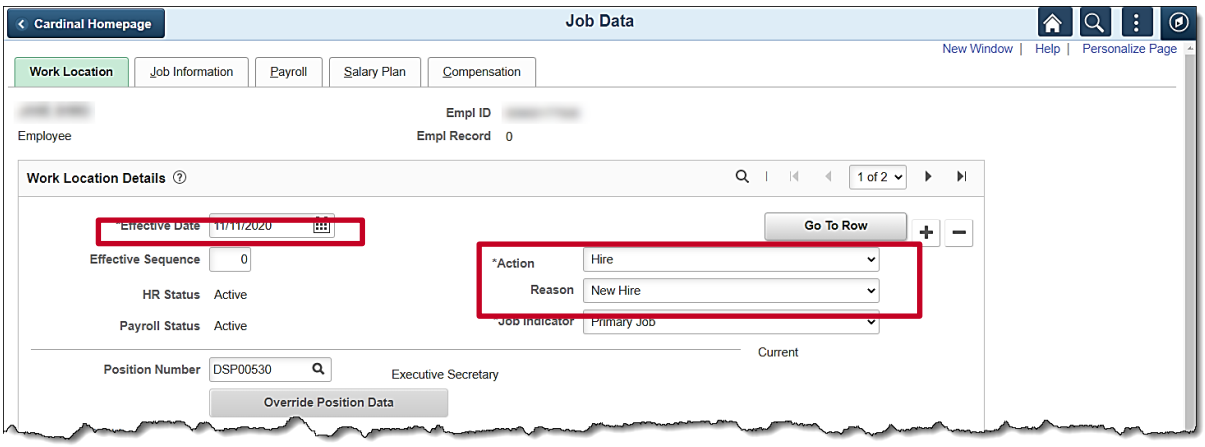
3. Click the **Search** button.

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



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.



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.

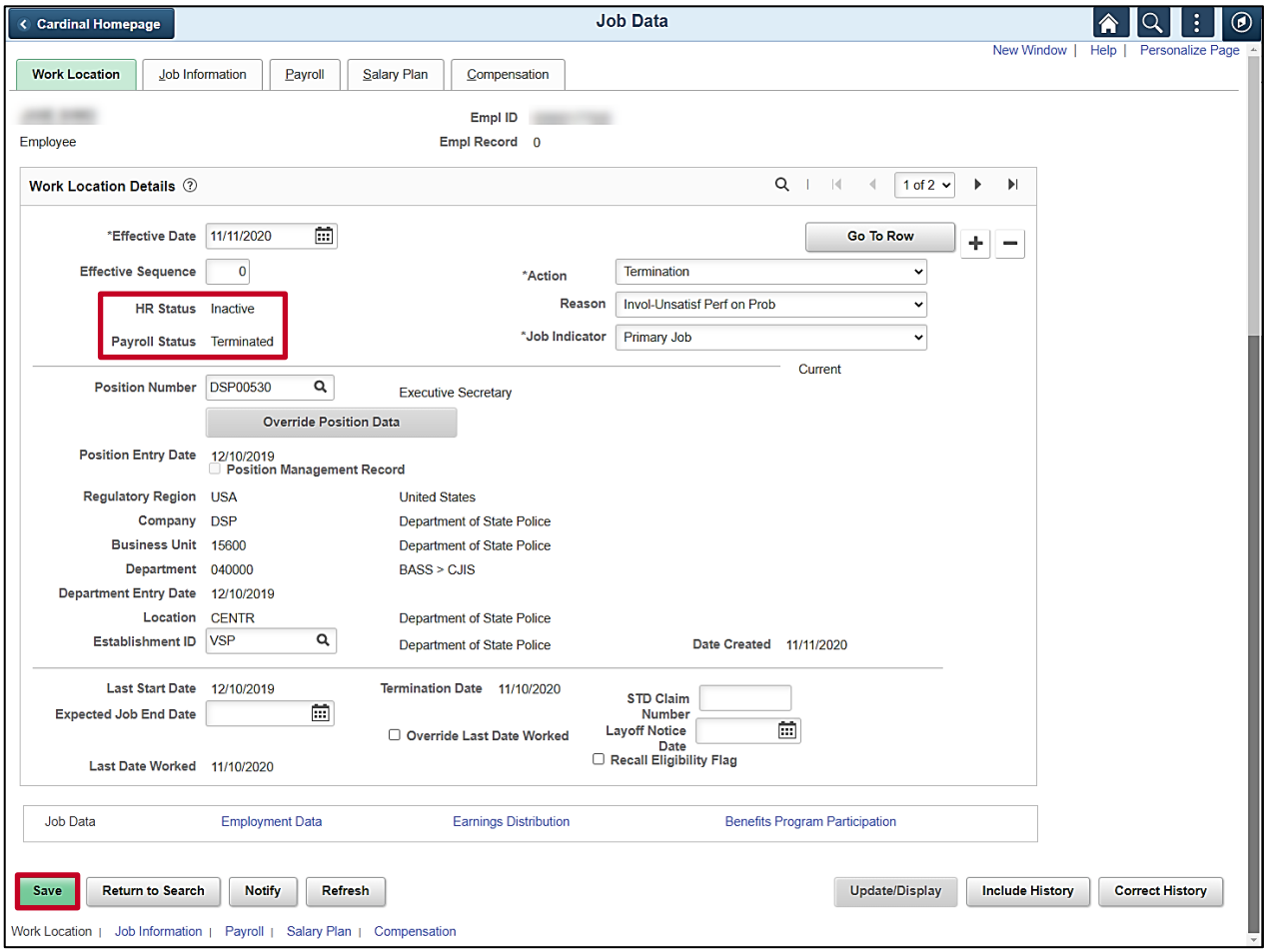
   Note: For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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**.

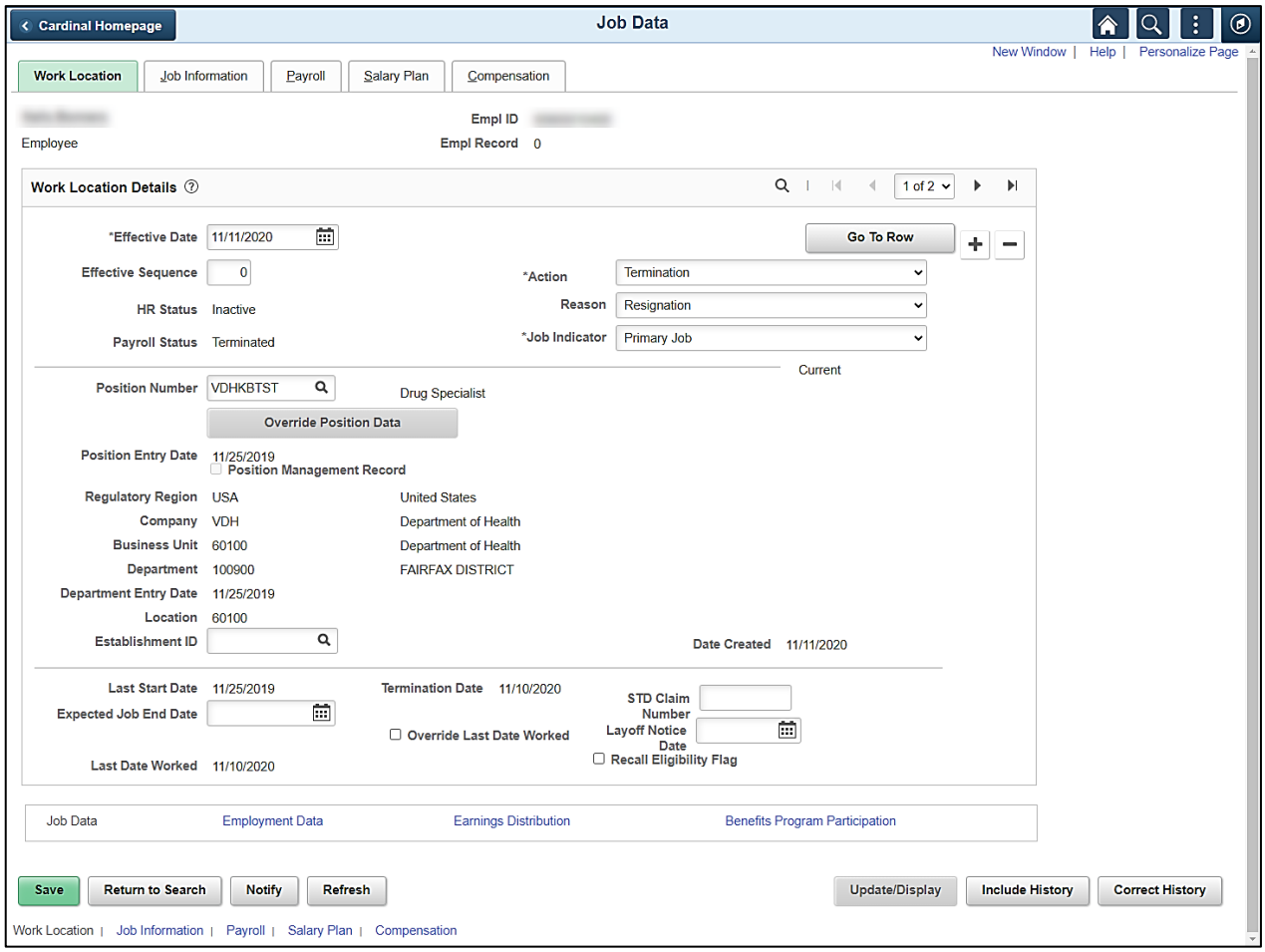
The **Job Data** page refreshes.



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.

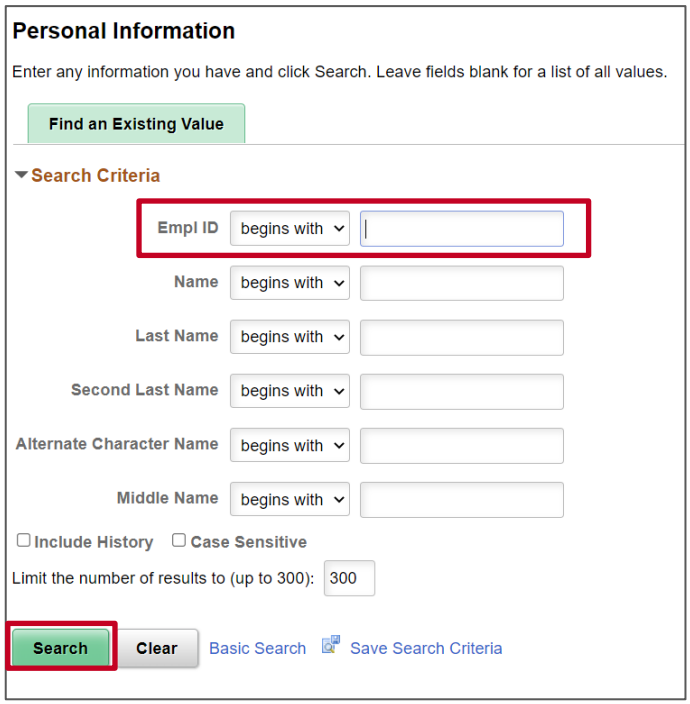
The **Job Data** page returns.



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:

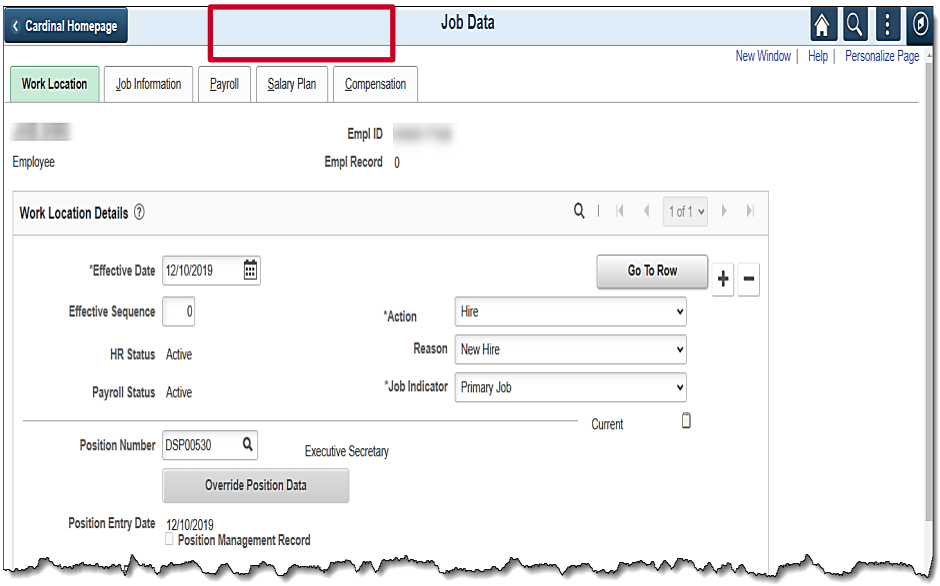
    Navigator > Workforce Administration > Personal Information > Modify a Person

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



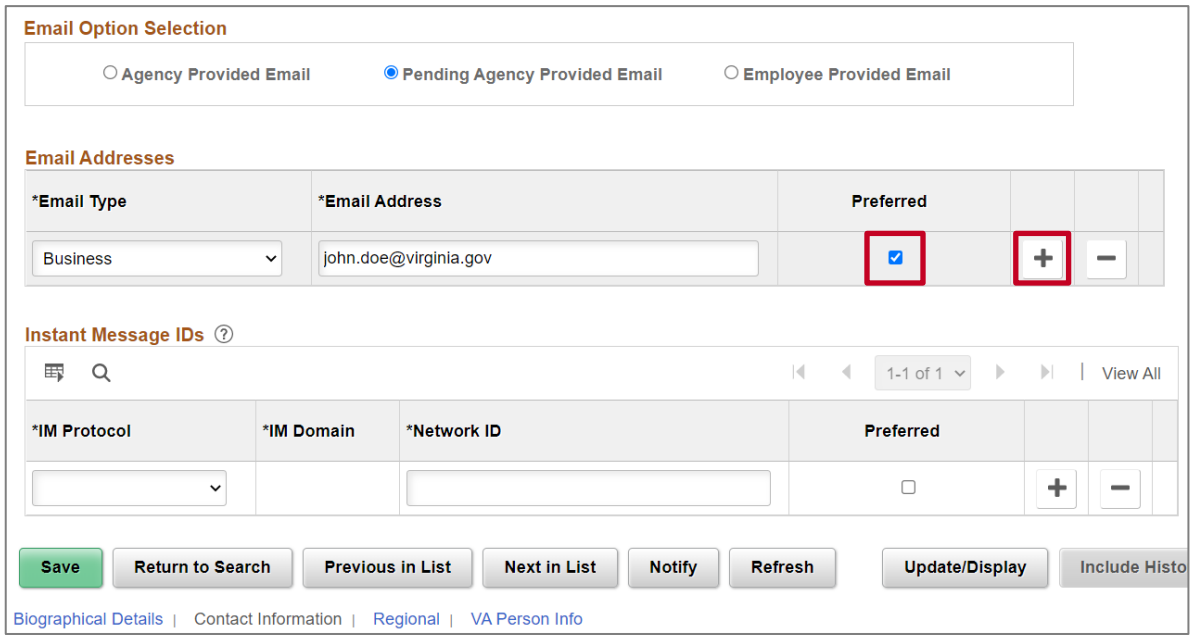
11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

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

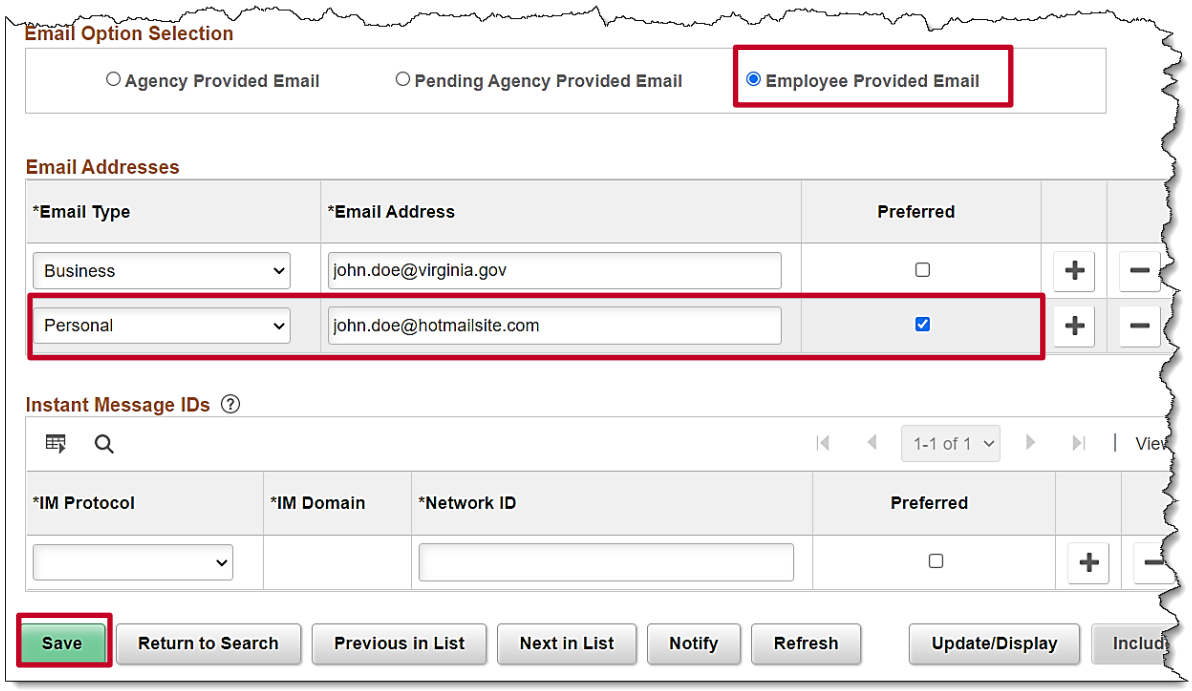


12. Click the **Contact Information** tab.

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



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.
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. To 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.**

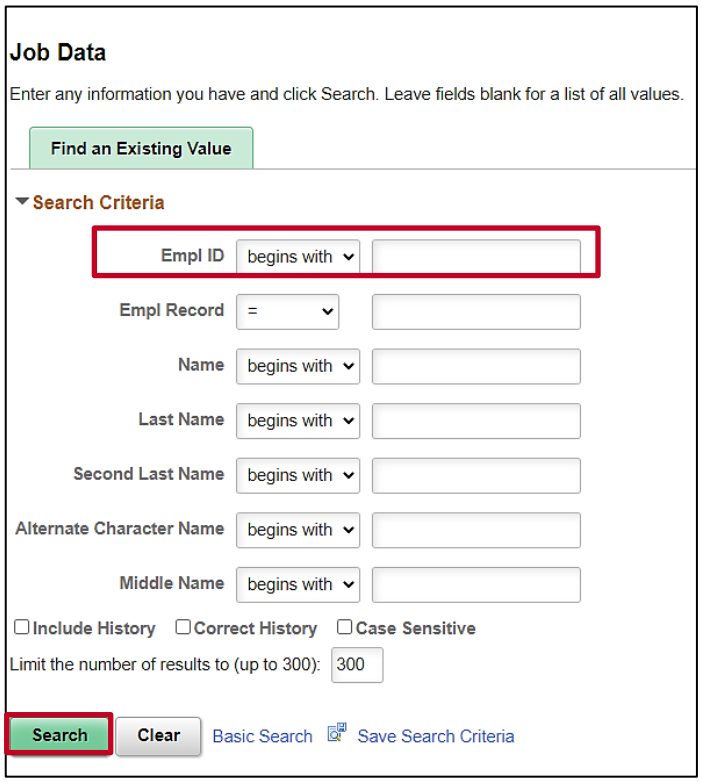
19. Print the report and place the printed transaction in the employee file for future audit requests.

Retirement

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

   Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

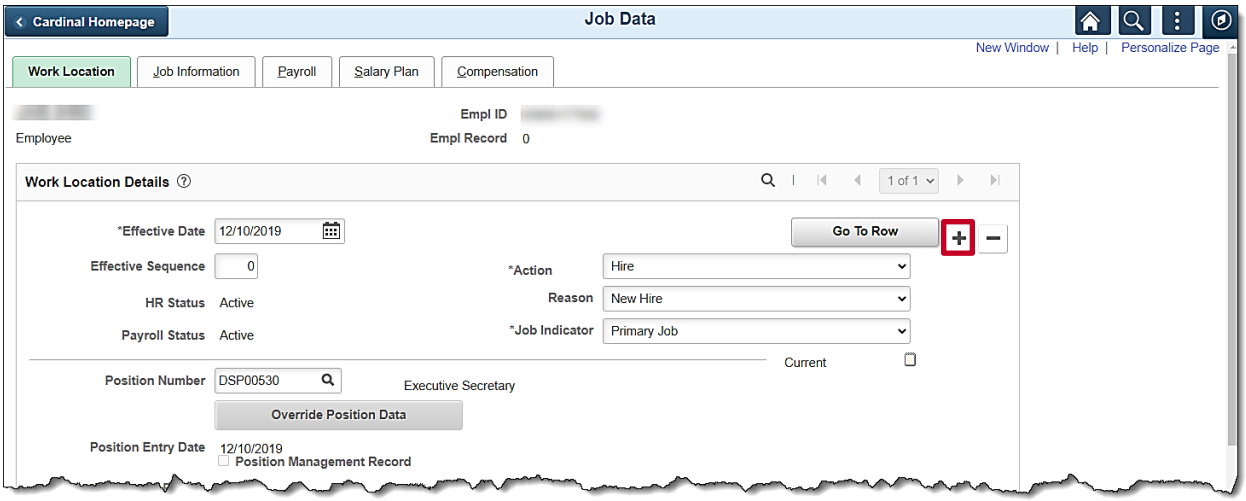


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

   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.

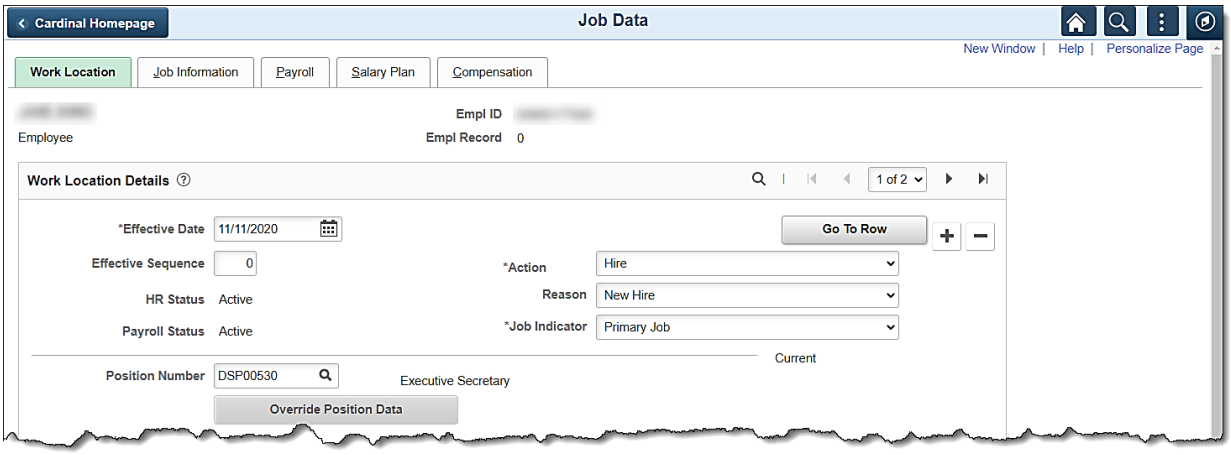
3. Click the **Search** button.

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



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.



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.

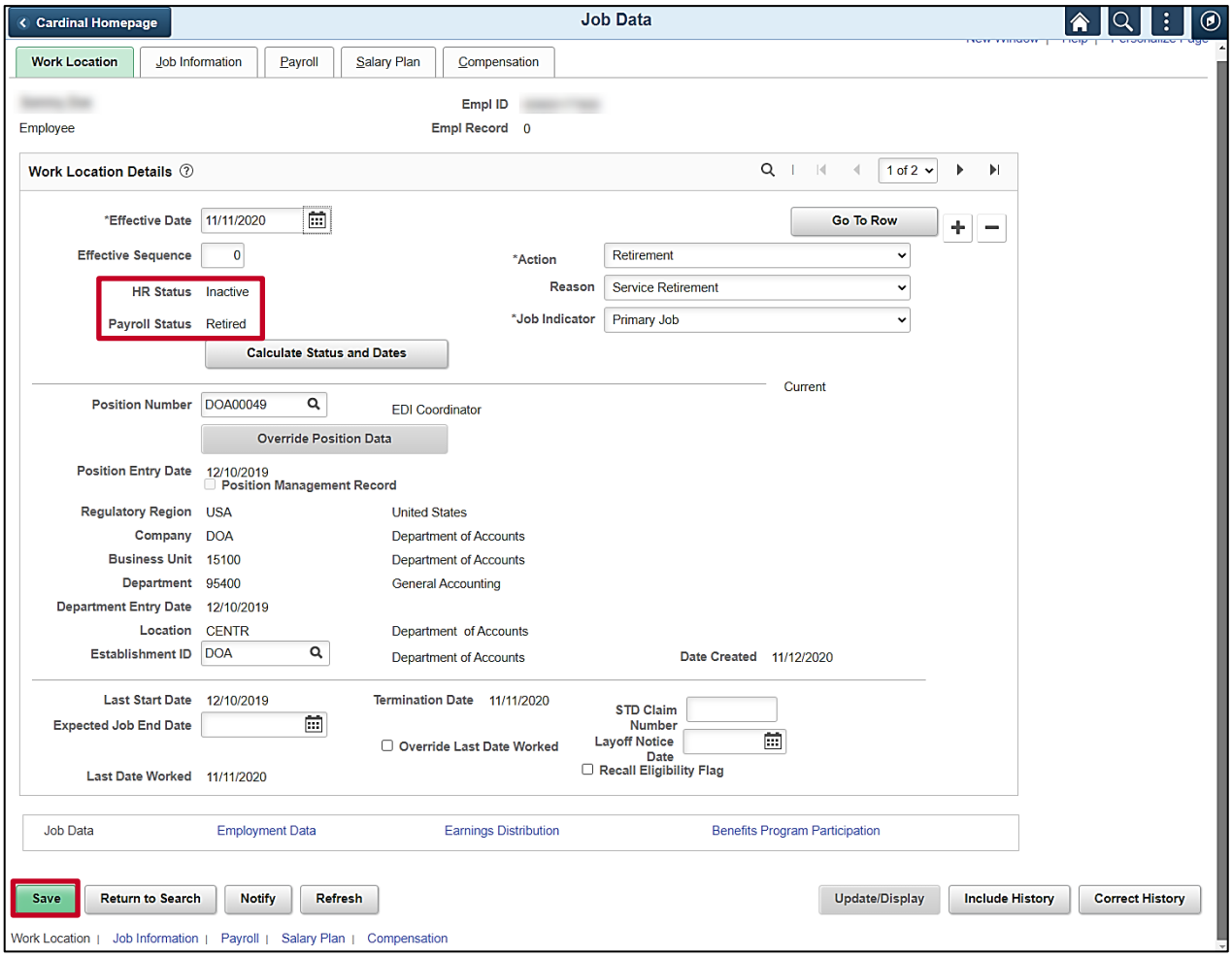
   Note: Set the effective date to be one day after the employee's last day worked. If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid 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 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.



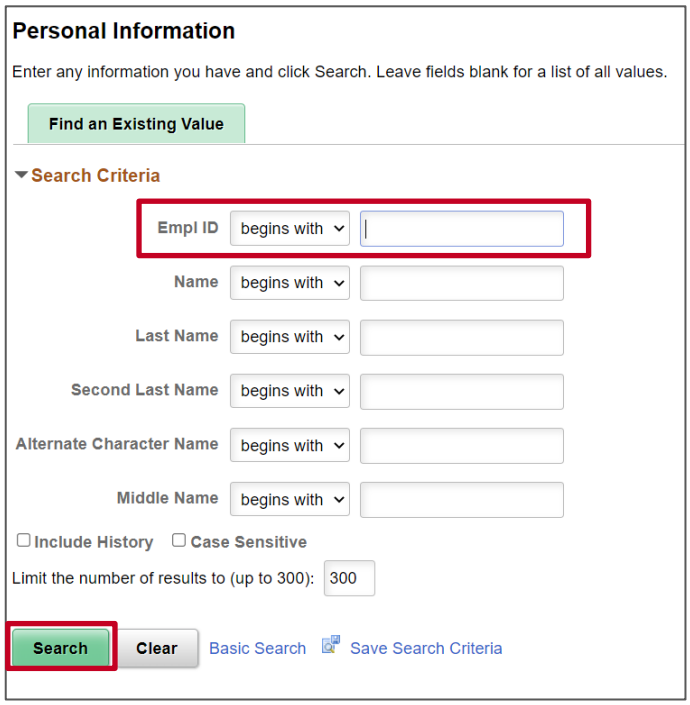
8. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will automatically update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.

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:

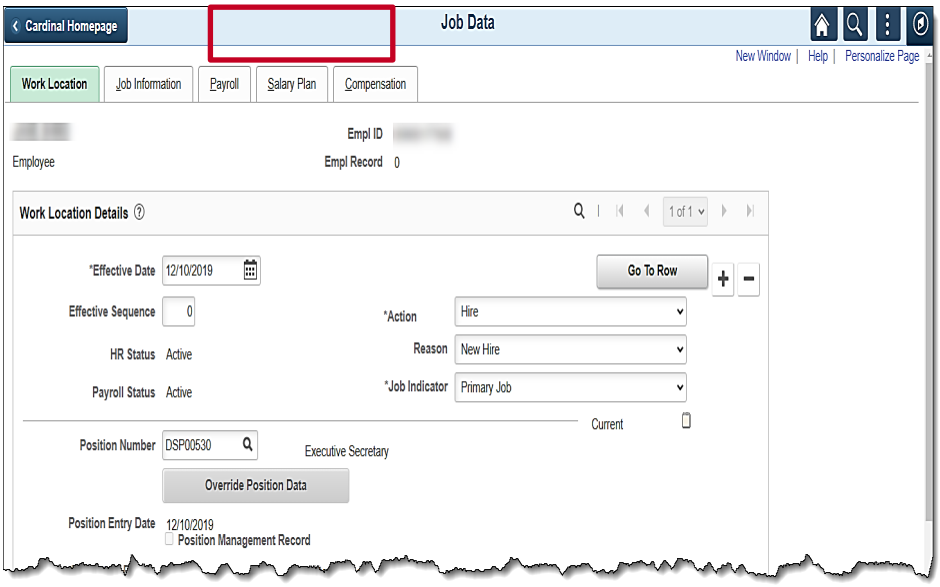
    Navigator > Workforce Administration > Personal Information > Modify a Person

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



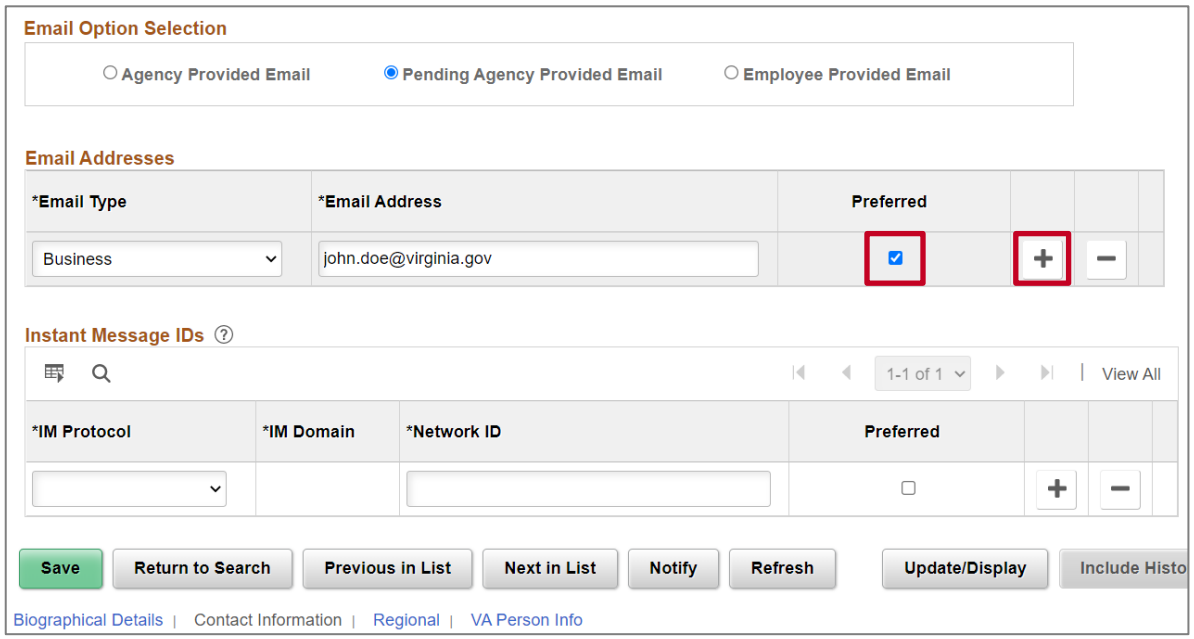
11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

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

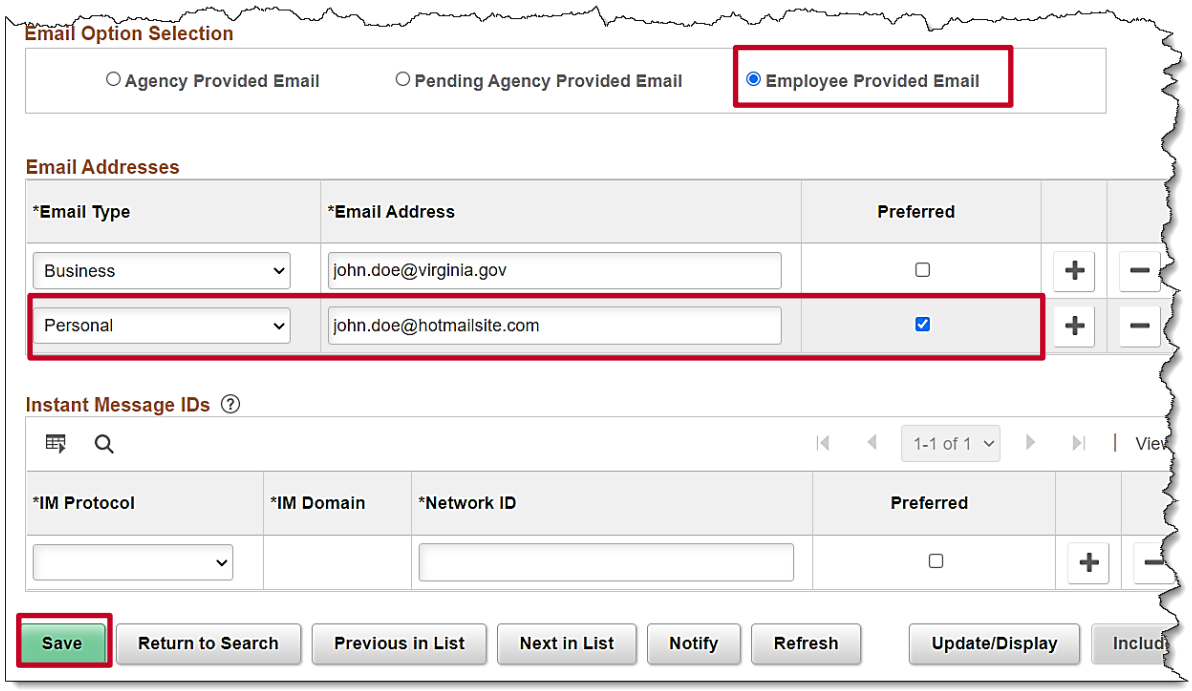


12. Click the **Contact Information** tab.

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



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.
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. To 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.