

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 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 **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_Benefits 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**.

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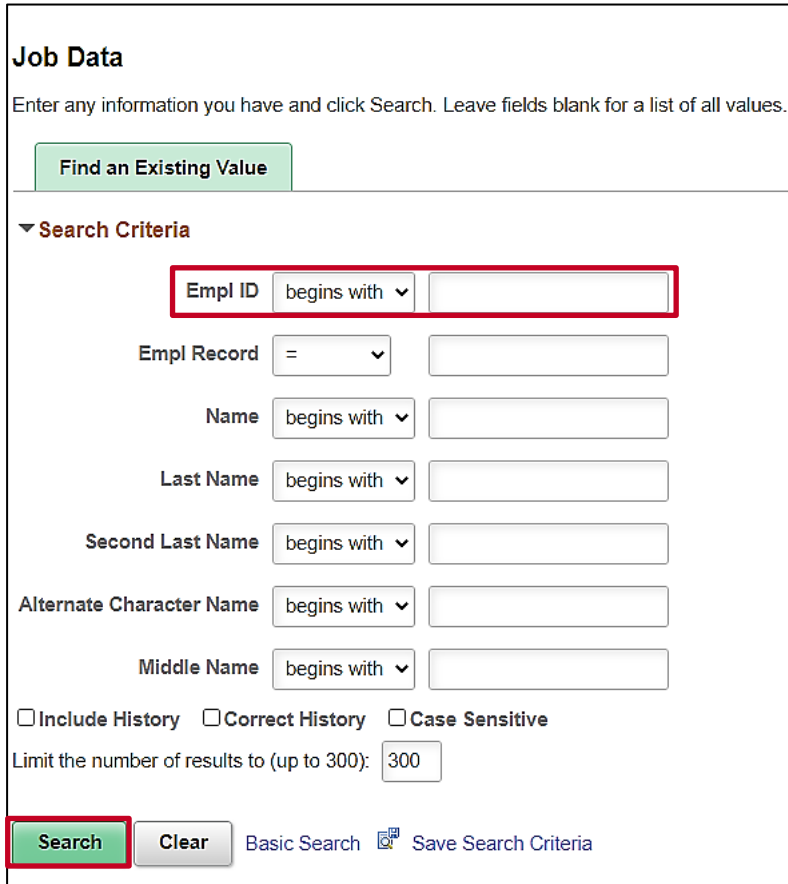
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Termination – Voluntary

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

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.

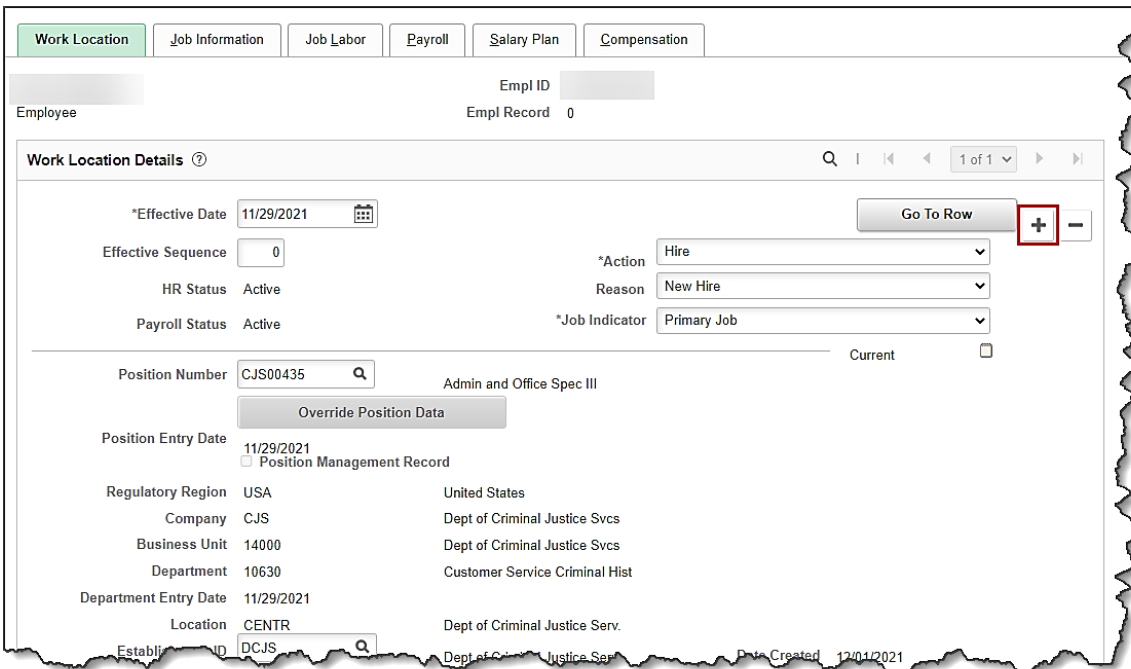


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

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.



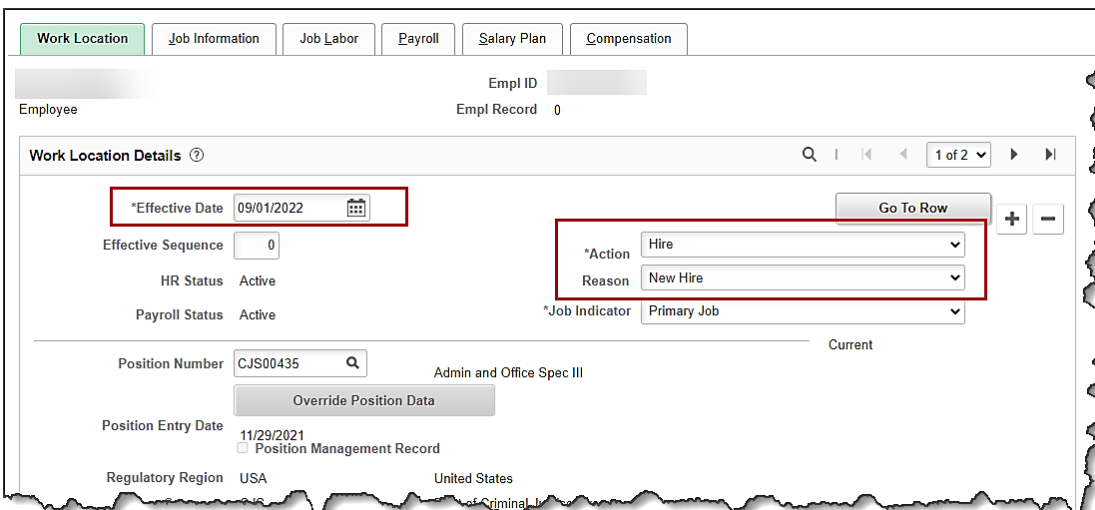
The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section contains the following information:

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

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 contains the following information:

- *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 (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.)

The 'Effective Date' field and the '+' icon on the 'Go To Row' button 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: 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).

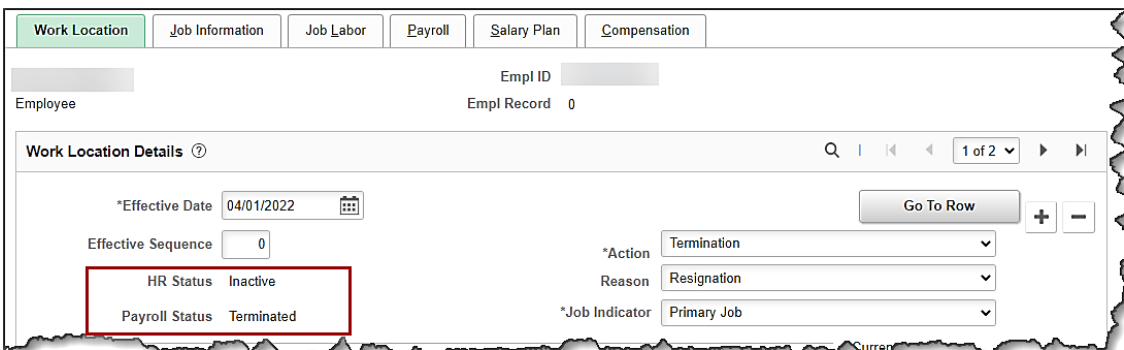
If an employee’s last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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 Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

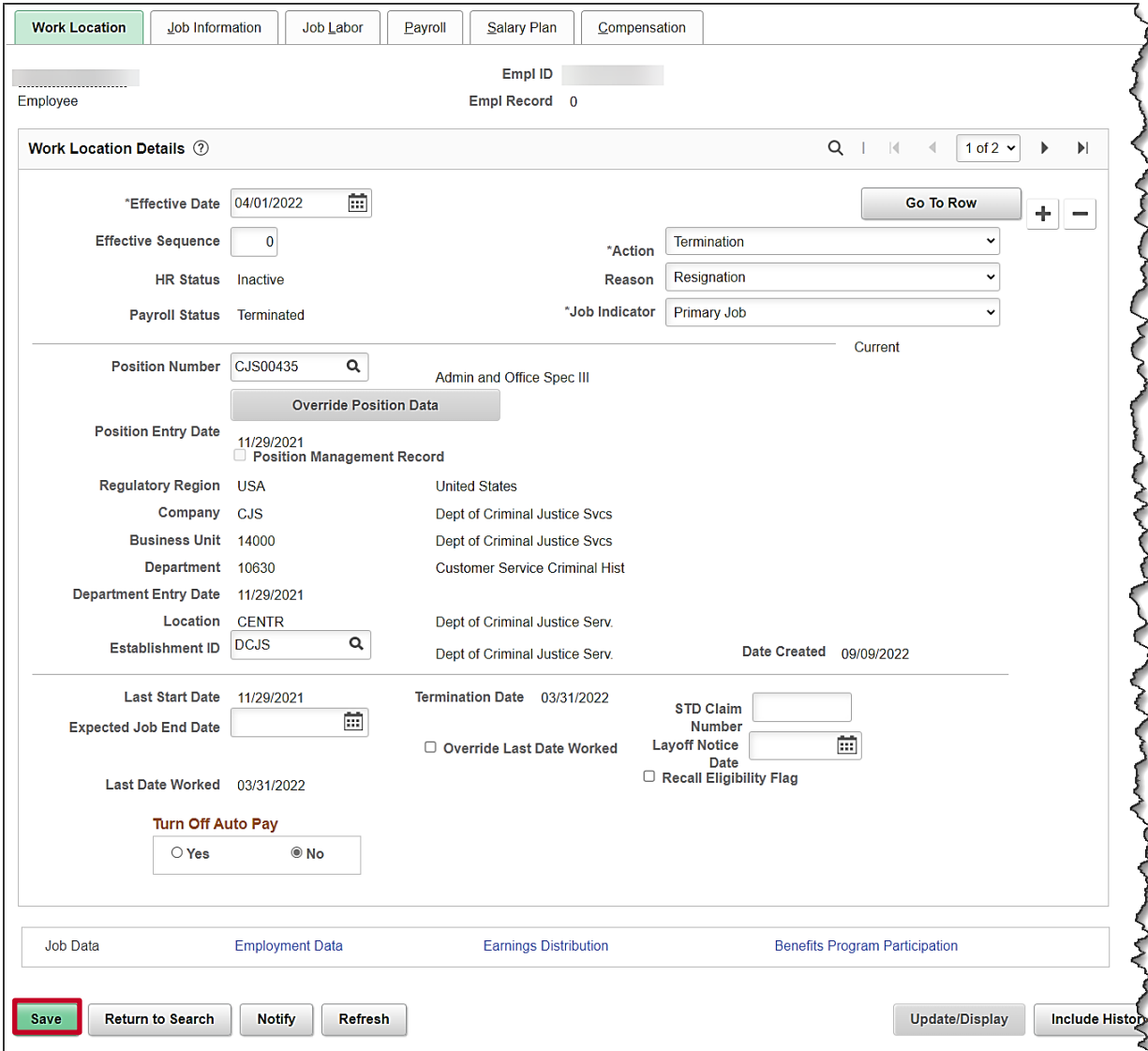
The **Job Data** page refreshes.



Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
Employee [Redacted] Empl ID [Redacted] Empl Record 0					
Work Location Details 1 of 2					
*Effective Date 04/01/2022		Go To Row + -			
Effective Sequence 0		*Action Termination	Reason Resignation		
HR Status Inactive		*Job Indicator Primary Job			
Payroll Status Terminated					

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.



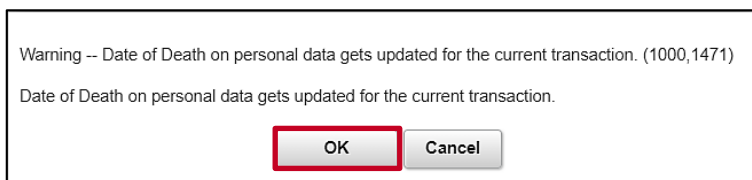
The screenshot shows the 'Job Data' page for an employee's separation status. The 'Work Location' tab is active. The form contains the following fields and values:

- 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:** No (selected)

At the bottom of the form, the 'Save' button is highlighted with a red box. Other buttons include '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.

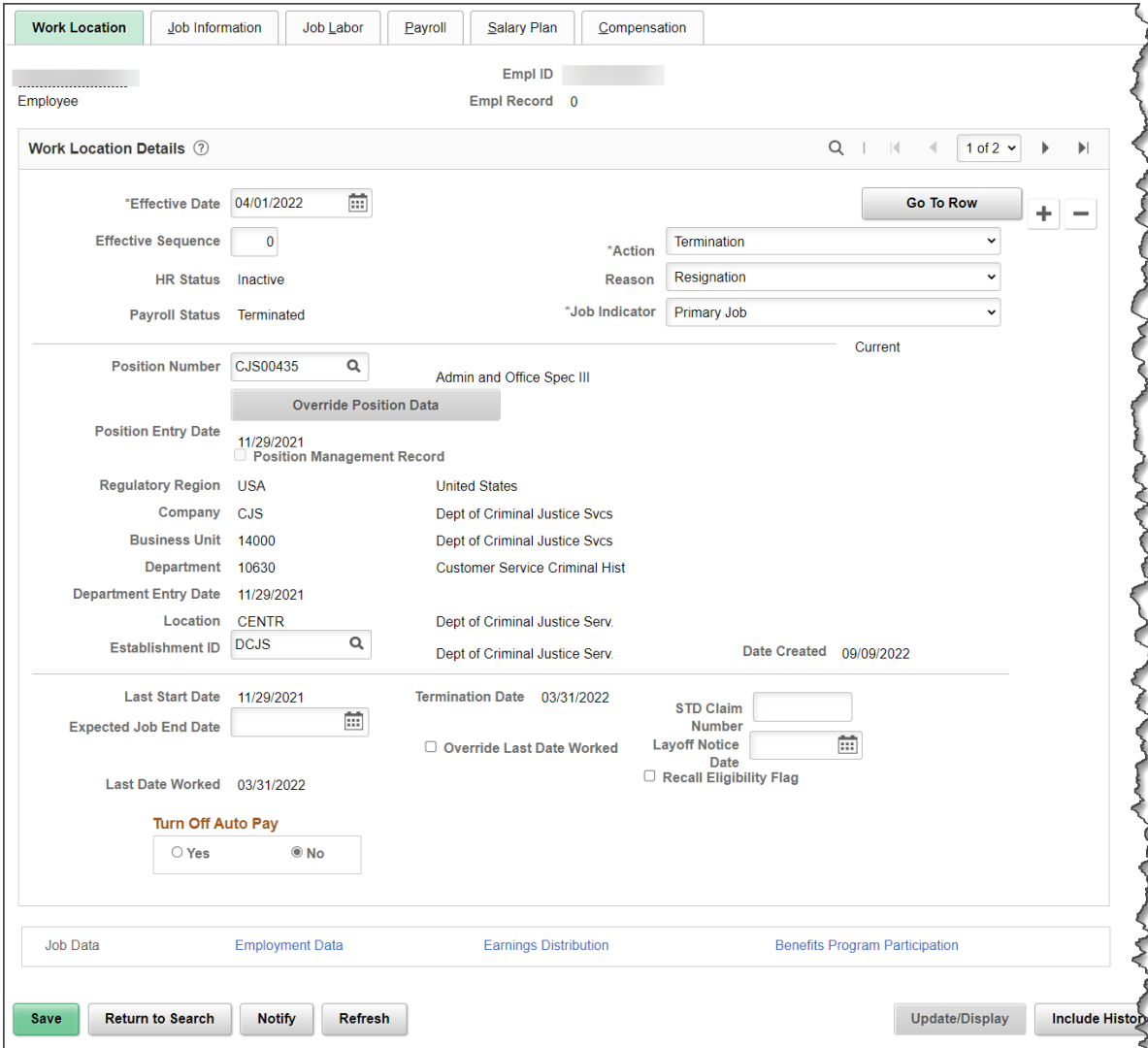


Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)
Date of Death on personal data gets updated for the current transaction.

OK Cancel

10. Click the **OK** button.

The **Job Data** page returns.



The screenshot displays the 'Work Location' tab of a HR 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'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.)
- 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 **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](#)

13. 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 XXXXXXXXXX

Name 1 of 2 [View All](#)

Effective Date 12/31/2019 + -

Format Type English

Display Name XXXXXXXXXX View Name

Biographic Information

Date of Birth Years 30 Months 3

Date of Death

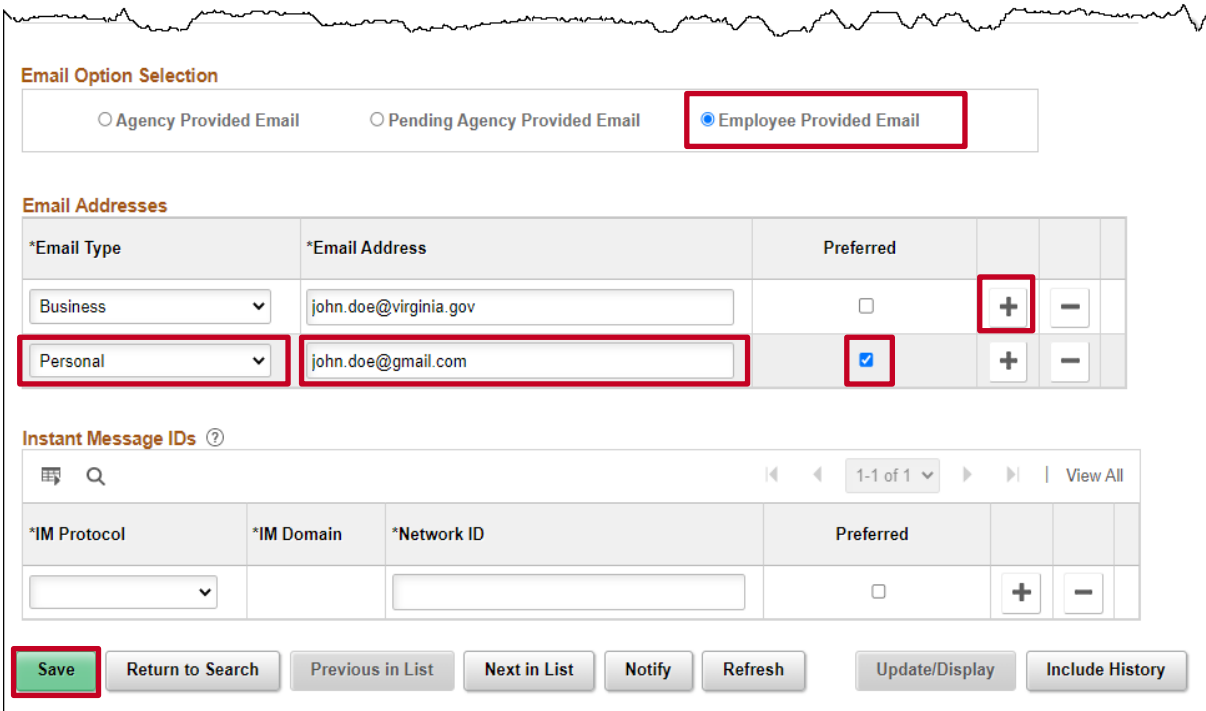
Birth Country United States

Birth State

Birth Location Exclude Contact Information?

14. Click the **Contact Information** tab.

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"/>	+	-

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

Email Addresses

*Email Type	*Email Address	Preferred			
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

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.

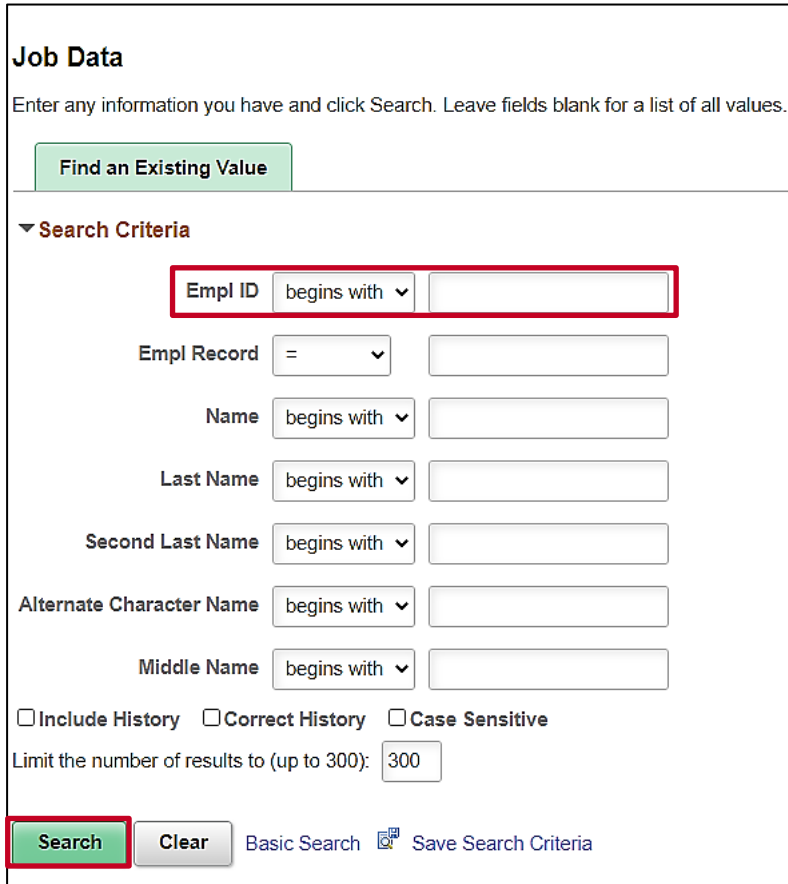
Note: For additional information on the Employee Activity Report and the steps used to run this report, refer to the **HCM Reports Catalog**. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

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.

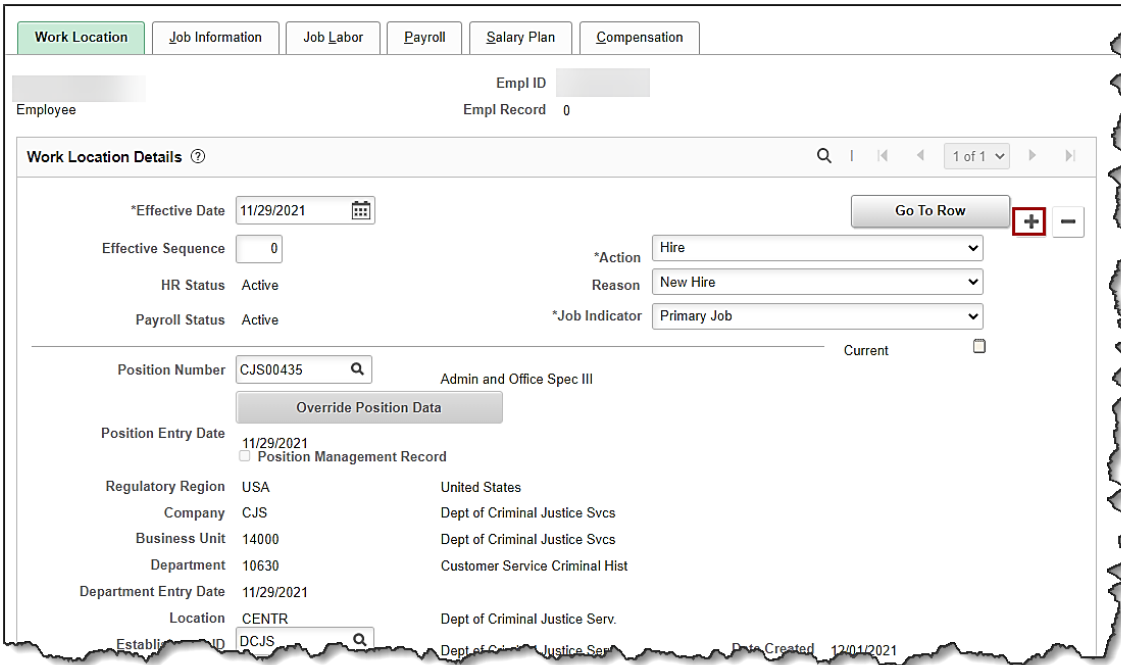


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

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.



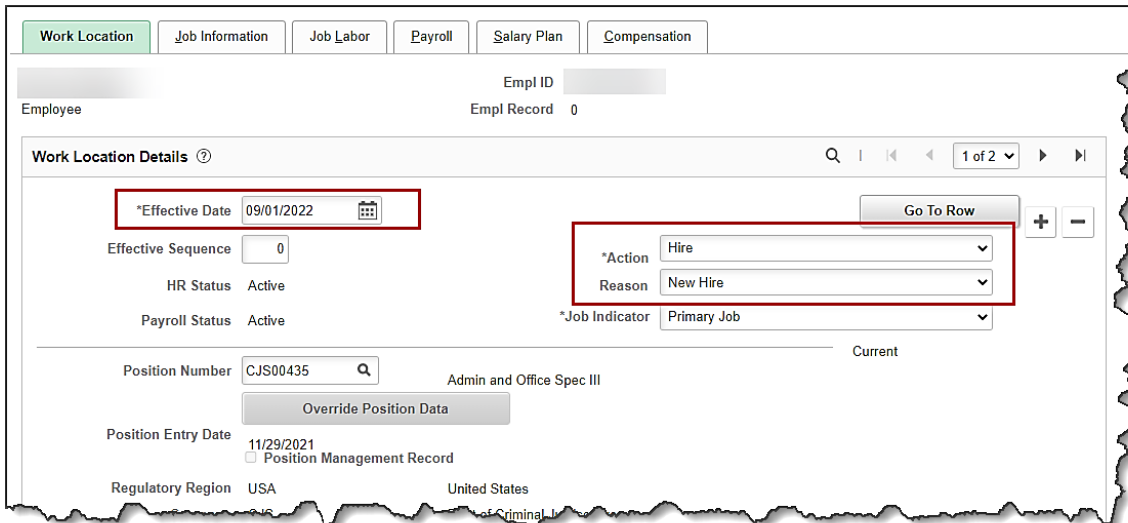
The screenshot shows the 'Work Location Details' form with the following fields:

- 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
- Location: CENTR
- Establishment ID: DCJS
- *Action: Hire
- Reason: New Hire
- *Job Indicator: Primary Job

A red box highlights the 'Go To Row' button with a plus sign (+).

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 an effective date of 09/01/2022. A red box highlights the 'Effective Date' field and the 'Go To Row' button with a plus sign (+).

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

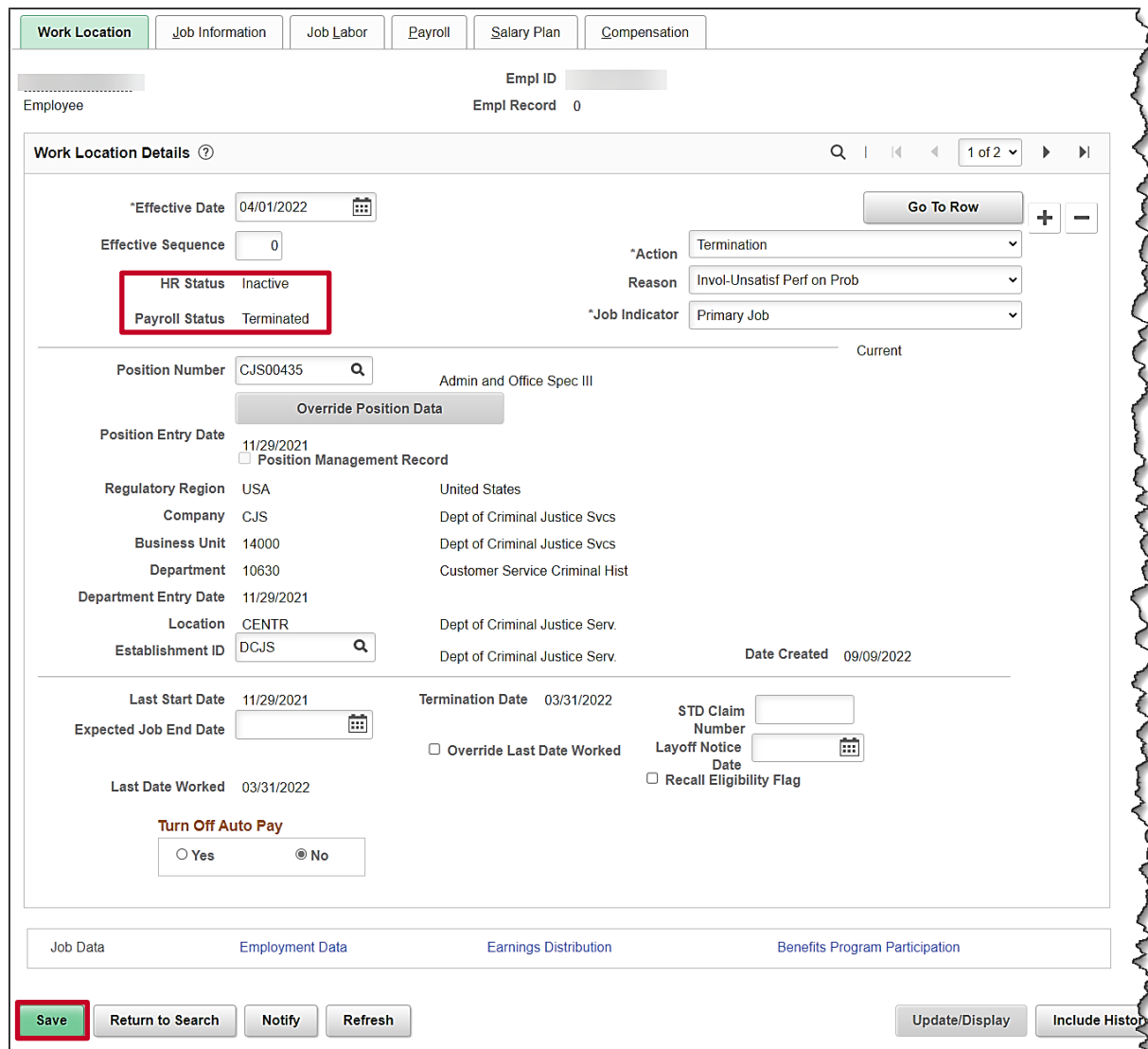
5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

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 Reason Codes**. 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 managing employee 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'. 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 fields, there is a section for 'Position Number' (CJS00435) and 'Position Entry Date' (11/29/2021). There are also fields for 'Regulatory Region' (USA), 'Company' (CJS), 'Business Unit' (14000), 'Department' (10630), 'Location' (CENTR), and 'Establishment ID' (DCJS). At the bottom of the form, 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.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Empl ID

Employee Empl Record 0

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

*Effective Date

Effective Sequence

HR Status Inactive

Payroll Status Terminated

*Action

Reason

*Job Indicator

Position Number Admin and Office Spec III

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 10630 Customer Service Criminal Hist

Department Entry Date

Location CENTR Dept of Criminal Justice Serv.

Establishment ID Dept of Criminal Justice Serv. Date Created 09/09/2022

Last Start Date

Expected Job End Date

Last Date Worked

Termination Date

Override Last Date Worked

STD Claim Number

Layoff Notice Date

Recall Eligibility Flag

Turn Off Auto Pay

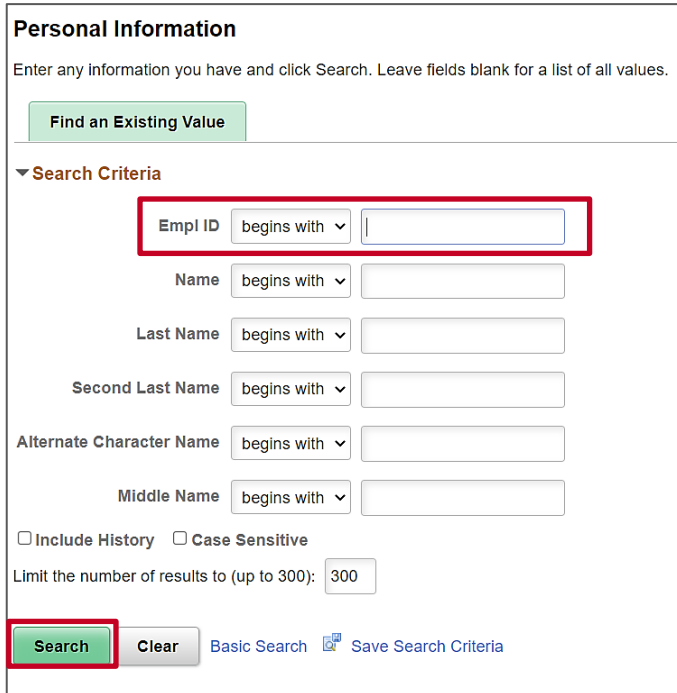
Yes No

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

- 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:

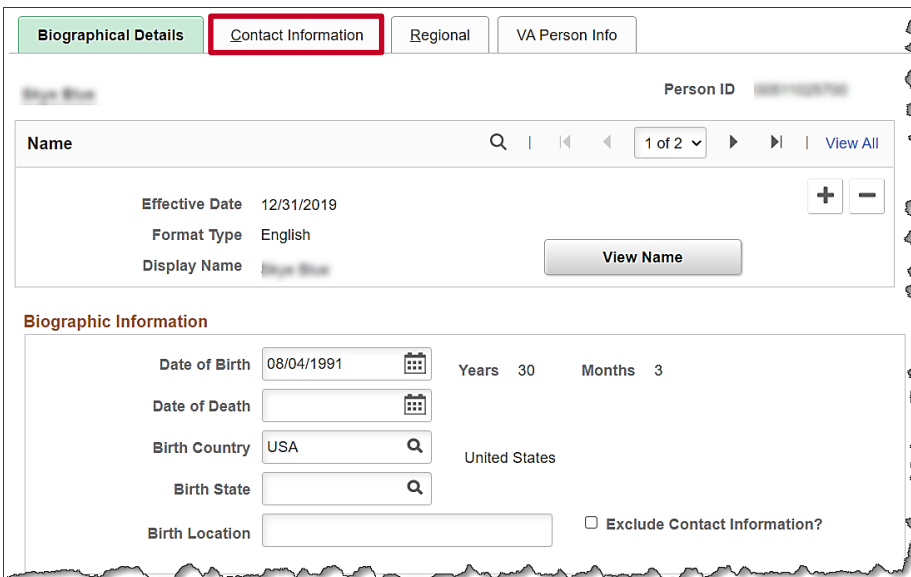
Navigator > Workforce Administration > Personal Information > Modify a Person

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



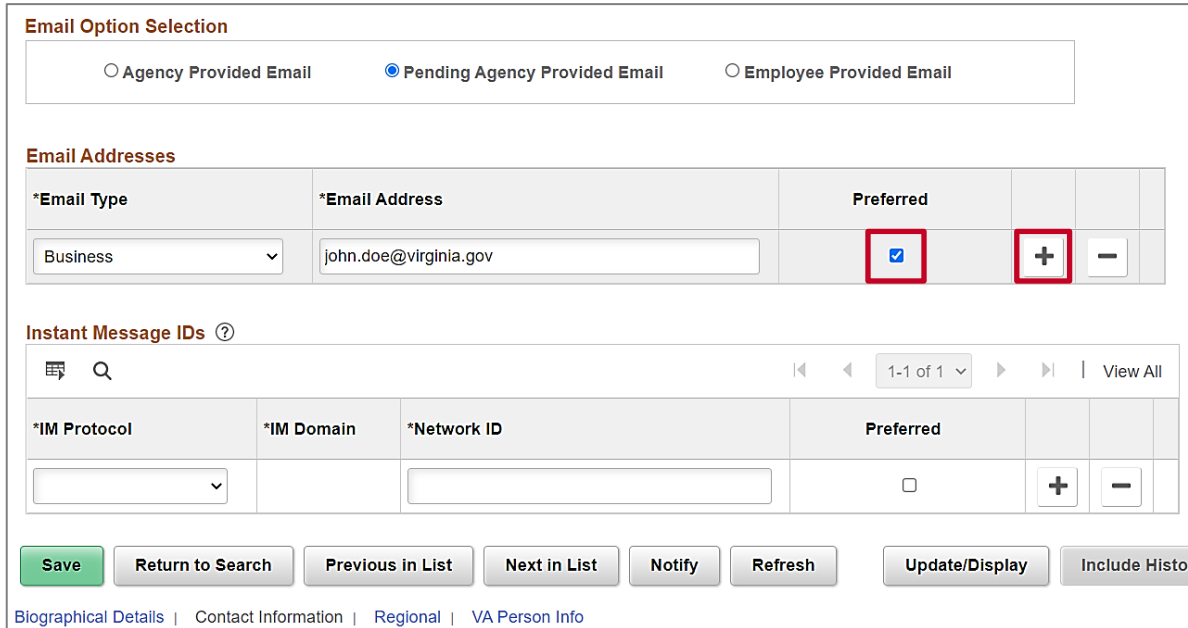
11. Enter the employee ID in the **Employee ID** field and click the **Search** button.

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

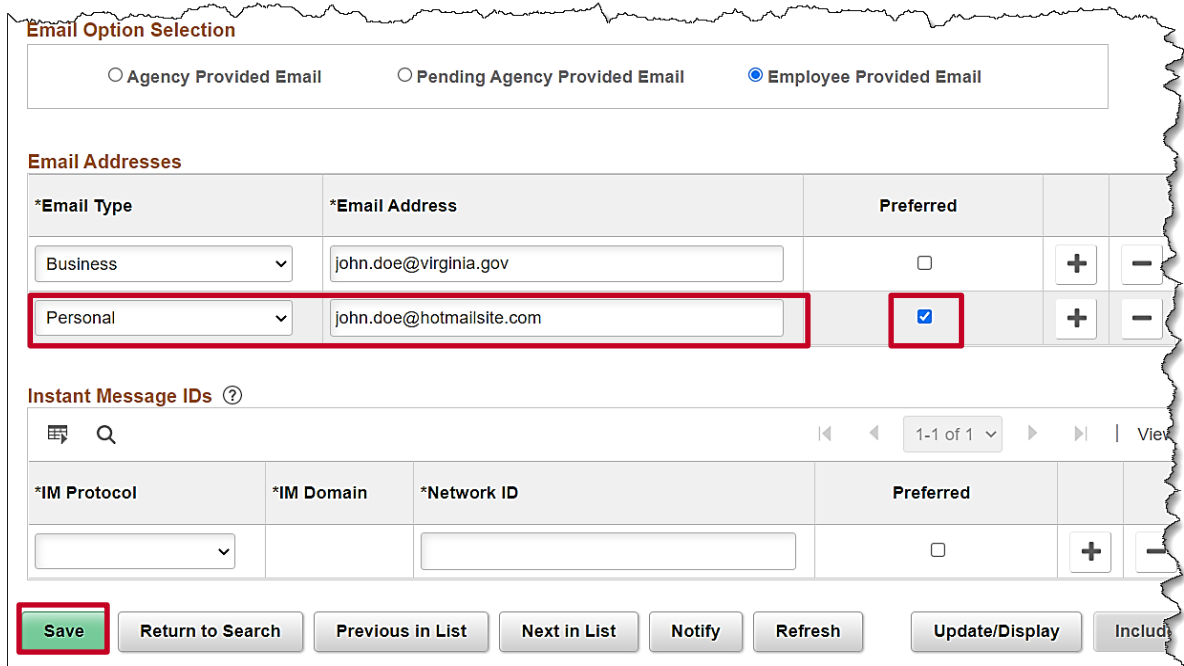
Email Addresses

*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.

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.

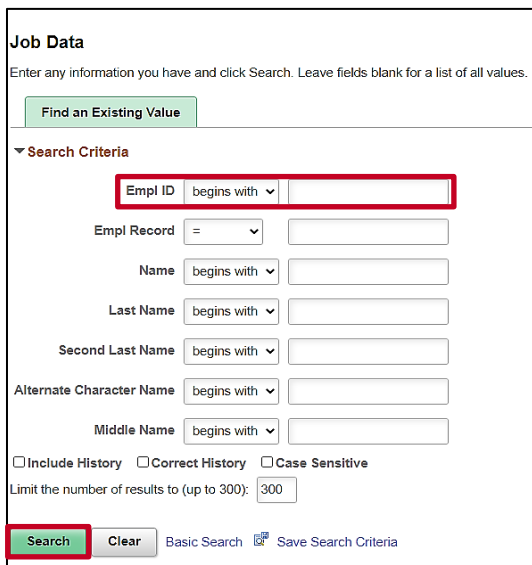
For further information about how to Manage Leave of Absence, see the Job Aid **HR351_Managing Leaves of Absence**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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.

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

Navigator > Workforce Administration > Job Information > Job Data

The **Job Data Search** page displays.



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

▼ **Search Criteria**

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

Middle Name begins with

Include History Correct History Case Sensitive

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

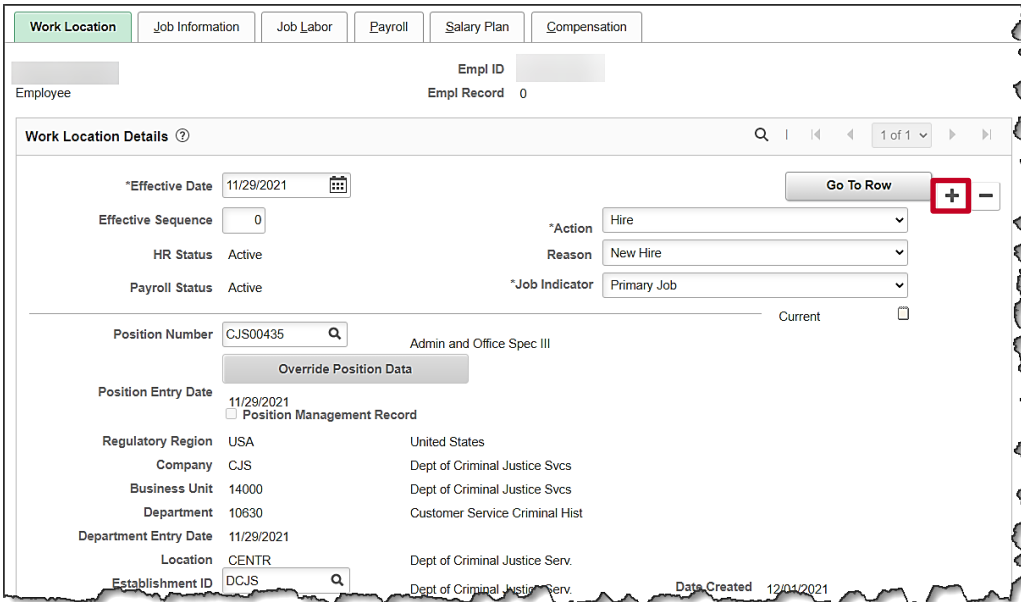
[Basic Search](#) [Save Search Criteria](#)

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.

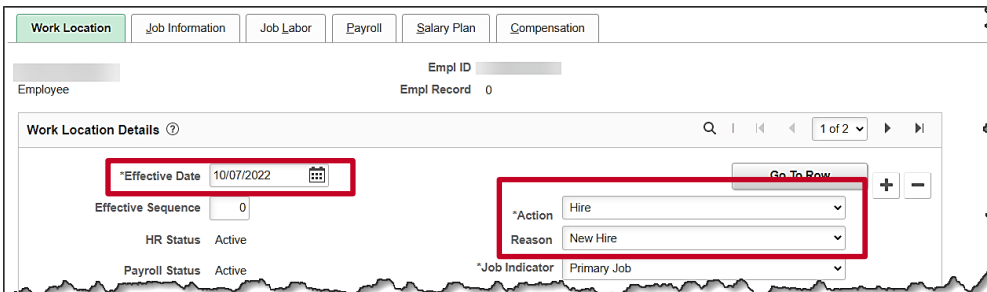
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The 'Effective Date' is 11/29/2021. The 'Go To Row' button has a red box around the '+' icon. Other fields include Effective Sequence (0), HR Status (Active), Payroll Status (Active), Position Number (CJS00435), and various organizational details like Company (CJS) and Department (10630).

- 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 with a new row added. The 'Effective Date' is now 10/07/2022. The 'Action' dropdown is set to 'Hire' and the 'Reason' dropdown is set to 'New Hire'. Red boxes highlight these fields.

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

- 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 the day immediately following last day worked (or the day after the employee's last day on the payroll).

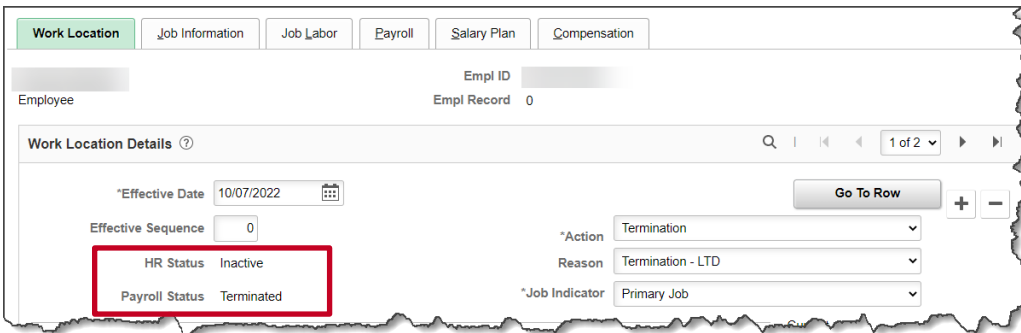
If an employee's last day is 11/10/2021, the effective date of the termination should be 11/11/2021. For further information on effective dating, see the Job Aid titled **HR351_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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

- Select the **Reason** field dropdown button to select “**Termination - LTD**”.

For further information on Action Reasons, see the Job Aid titled **HR351_Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

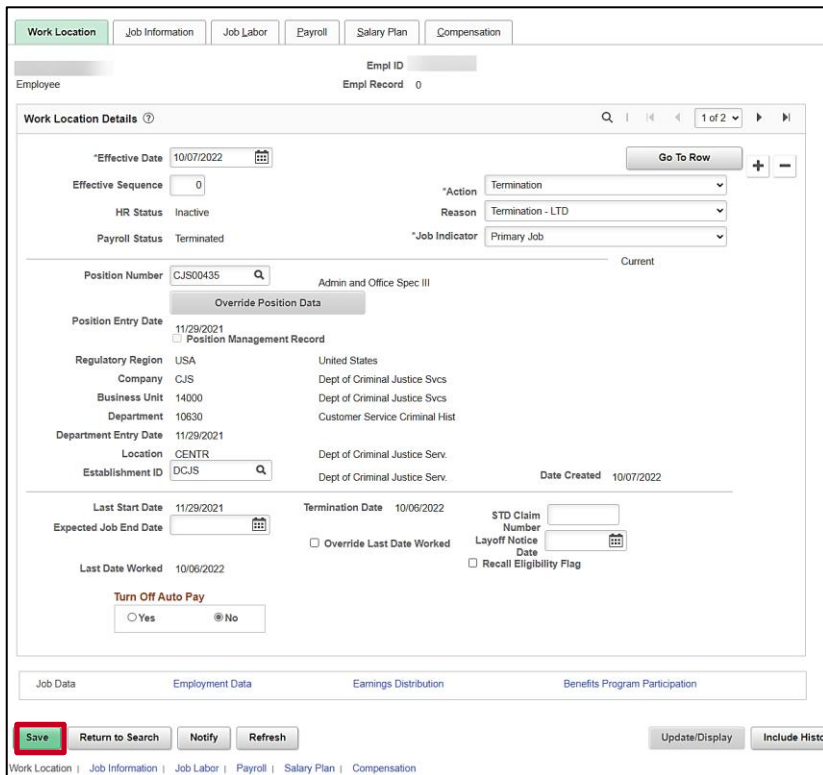
The **Job Data** page refreshes.



The screenshot shows the 'Work Location Details' form. The 'Effective Date' is 10/07/2022. 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 'Termination - LTD'. The 'Job Indicator' is 'Primary Job'.

- After selecting the **Action** and Action Reason **Termination/Termination - LTD**, 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' page. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Terminated'. The 'Position Number' is CJS00435. The 'Termination Date' is 10/06/2022. The 'Last Date Worked' is 10/06/2022. The 'Save' button is highlighted with a red box.

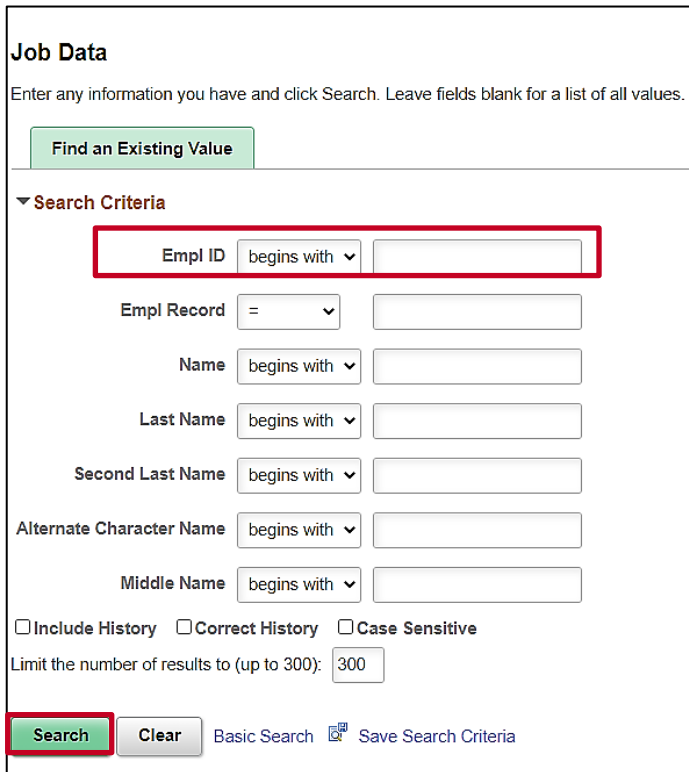
- Click the **Save** button.

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.

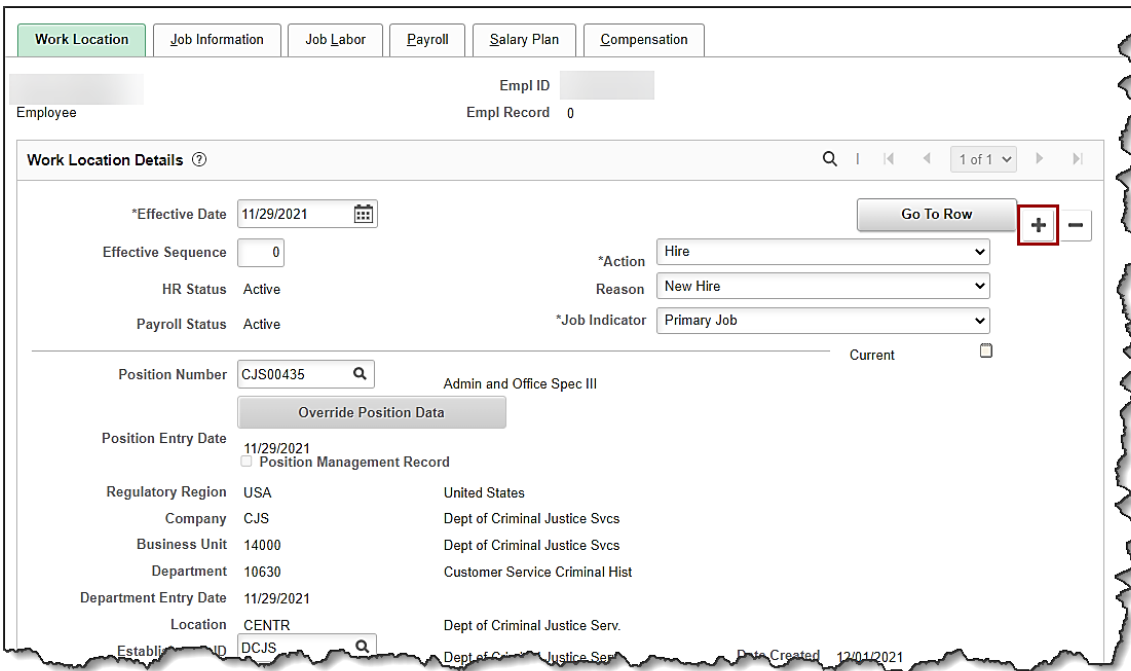


2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

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.

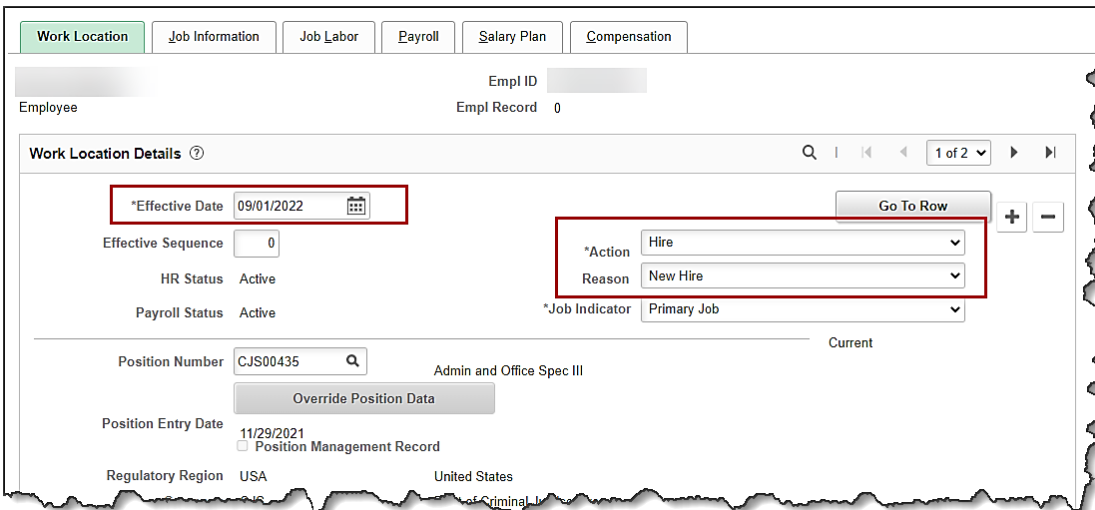
The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The '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.

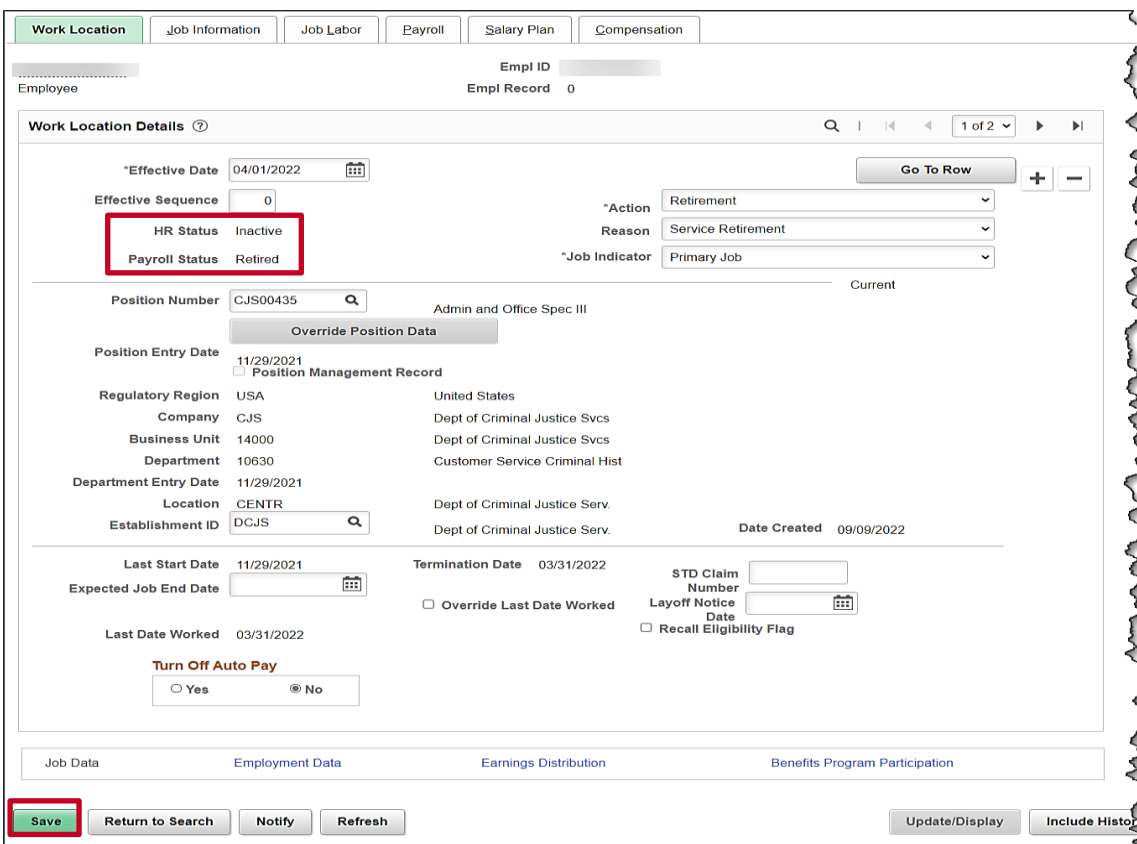
5. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

Note: Set the effective date to be one day after the employee’s last day worked. 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 Reason Codes**. 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):

[Basic Search](#)

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 Regional VA Person Info

Person ID

Name 1 of 2 [View All](#)

Effective Date 06/22/2021

Format Type English

Display Name

Biographic Information

Date of Birth 12/23/1973 Years 48 Months 1

Date of Death

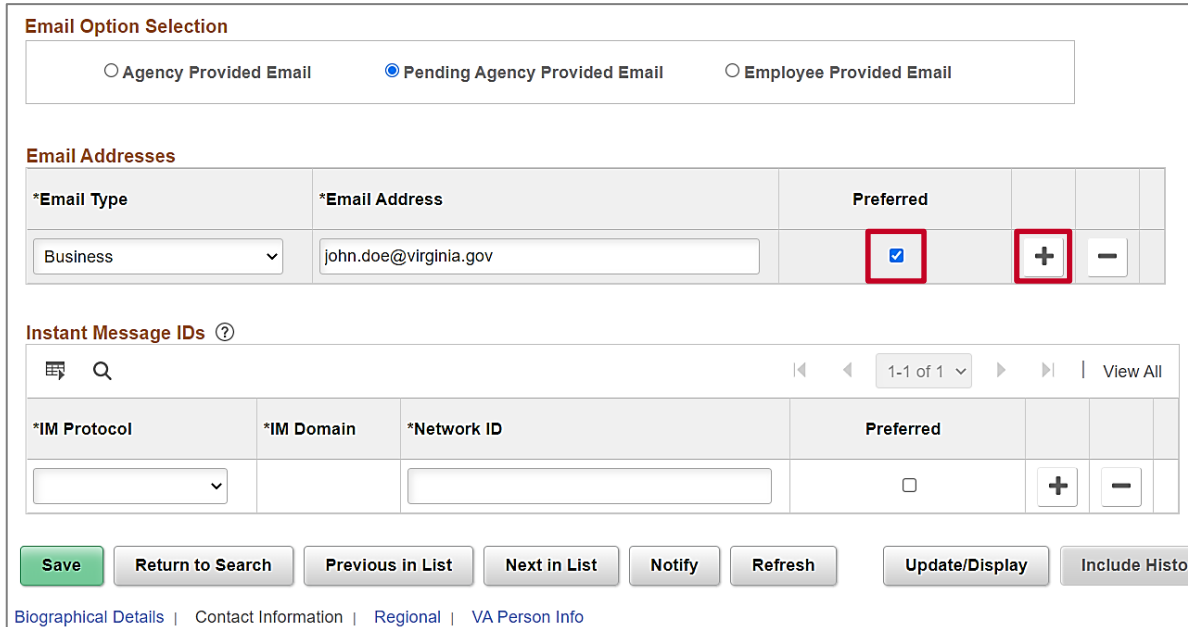
Birth Country USA United States

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 ?

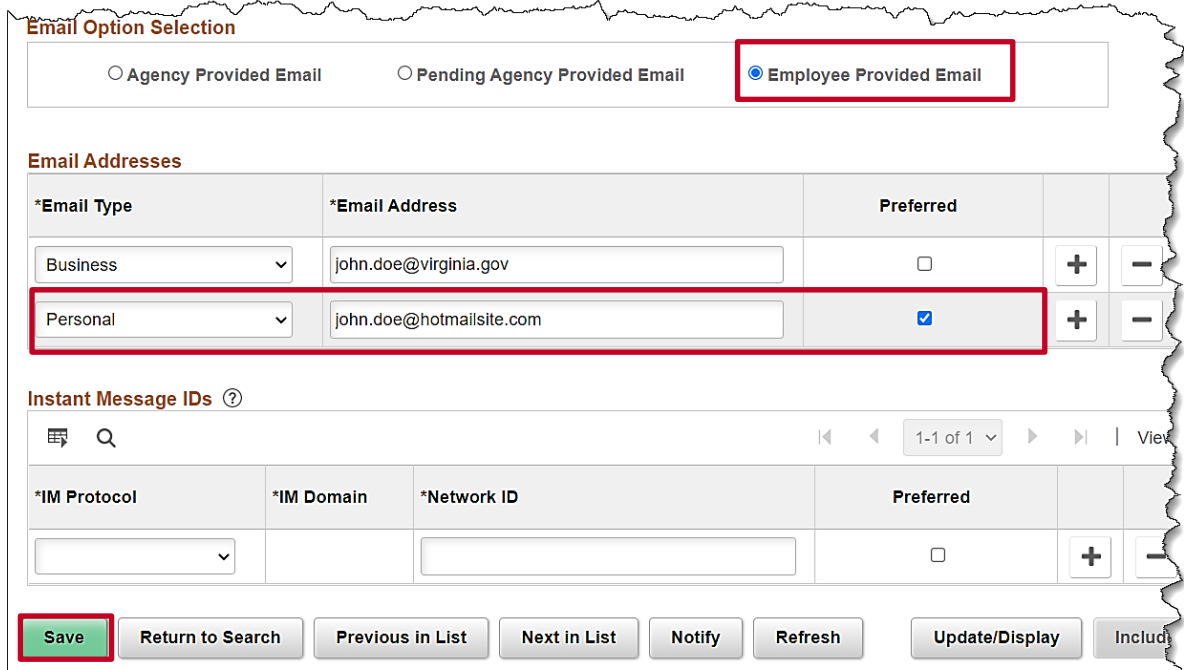
1-1 of 1 | View All

*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 Histo](#)

[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 ?

1-1 of 1 | View

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

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Refresh](#) [Update/Display](#) [Includ](#)

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.

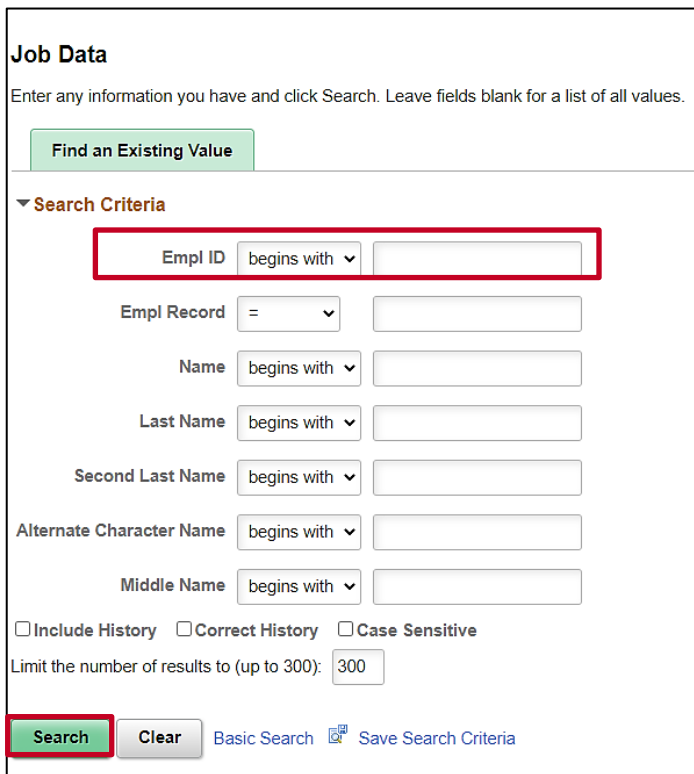
Note: Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

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.



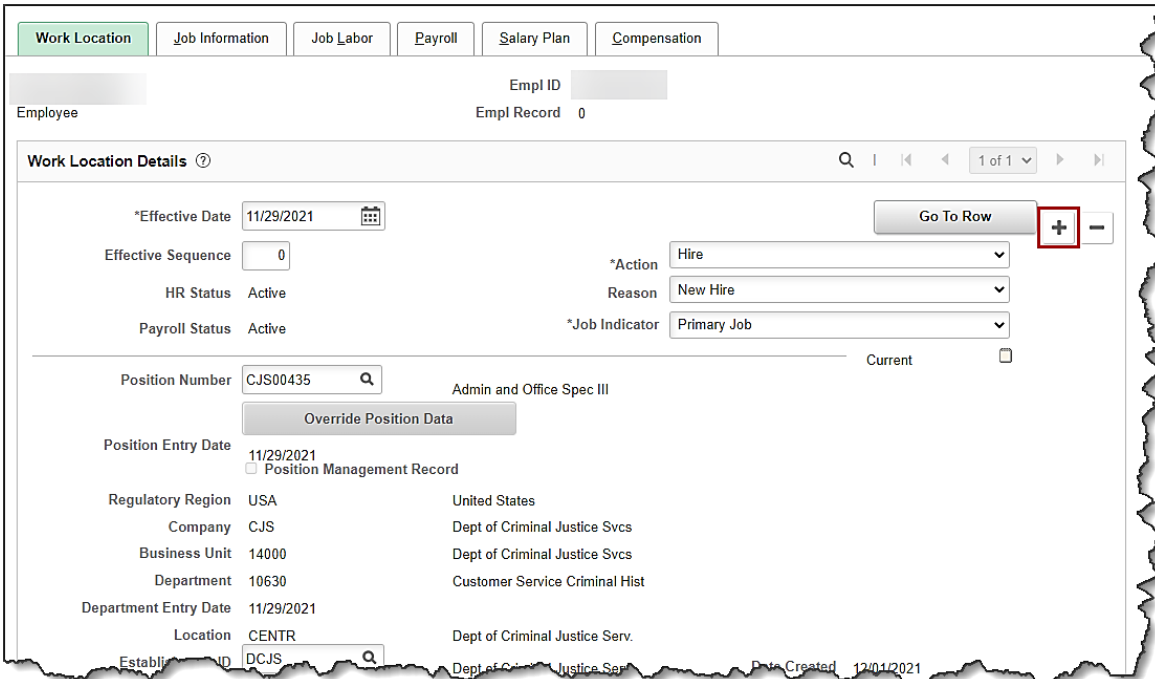
The screenshot shows the 'Job Data' search interface. At the top, there is a green button labeled 'Find an Existing Value'. Below it, a section titled 'Search Criteria' contains several search fields: 'Empl ID' (with a dropdown set to 'begins with'), 'Empl Record' (with an '=' operator dropdown), 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name' (all with 'begins with' dropdowns). There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive'. A text input field for 'Limit the number of results to (up to 300):' is set to '300'. At the bottom, there is a red-bordered 'Search' button, a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

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.



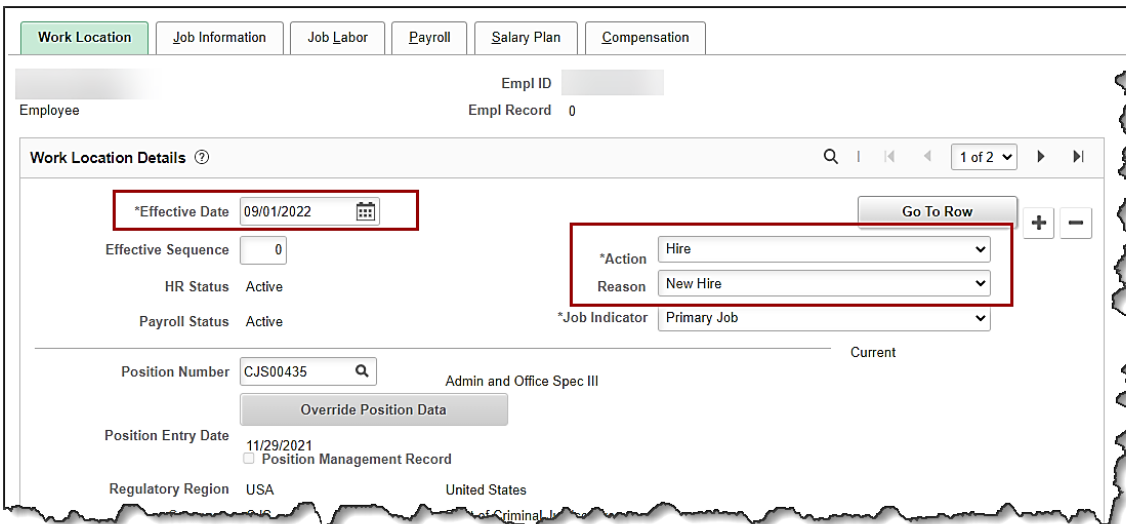
The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section contains the following information:

- *Effective Date: 11/29/2021
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire
- Reason: New Hire
- *Job Indicator: Primary Job
- Position Number: CJS00435 (Admin and Office Spec III)
- Position Entry Date: 11/29/2021
- 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)
- Location: CENTR (Dept of Criminal Justice Serv.)

A red box highlights the '+ -' buttons next to the 'Go To Row' label.

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 with two rows. The new row has the following information:

- *Effective Date: 09/01/2022
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire
- Reason: New Hire
- *Job Indicator: Primary Job

Red boxes highlight the new effective date field and the '+ -' buttons next to the 'Go To Row' label.

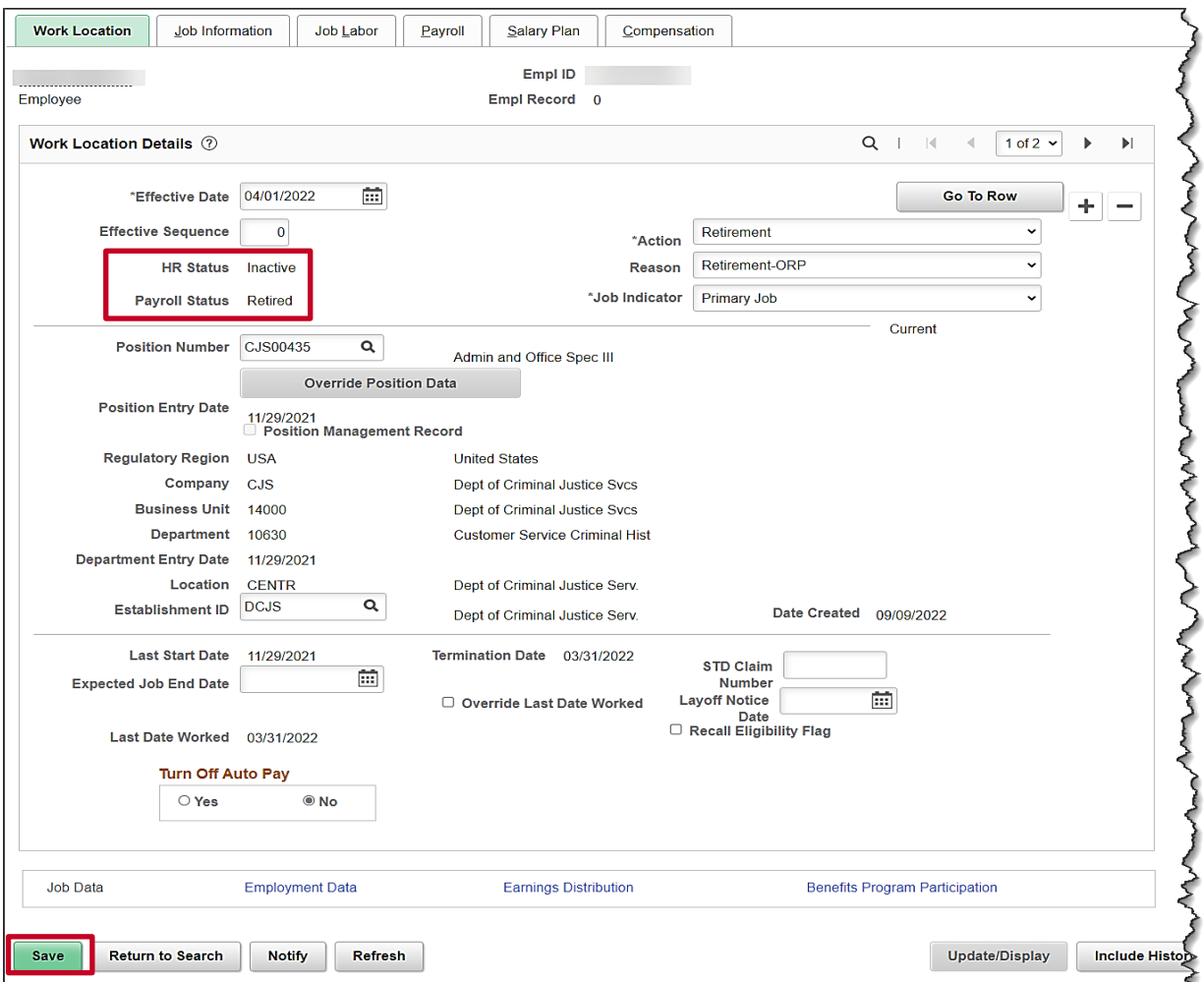
Note: When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

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.



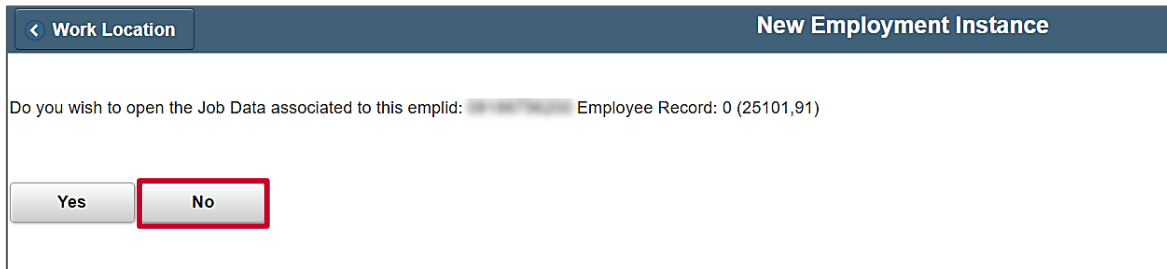
The screenshot shows the 'Work Location Details' form for an employee. The 'Effective Date' is 04/01/2022. The 'Action' is 'Retirement' and the 'Reason' is 'Retirement-ORP'. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Retired'. The 'Position Number' is CJS00435, 'Position Entry Date' is 11/29/2021, and 'Last Date Worked' is 03/31/2022. The 'Save' button is highlighted with a red box.

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

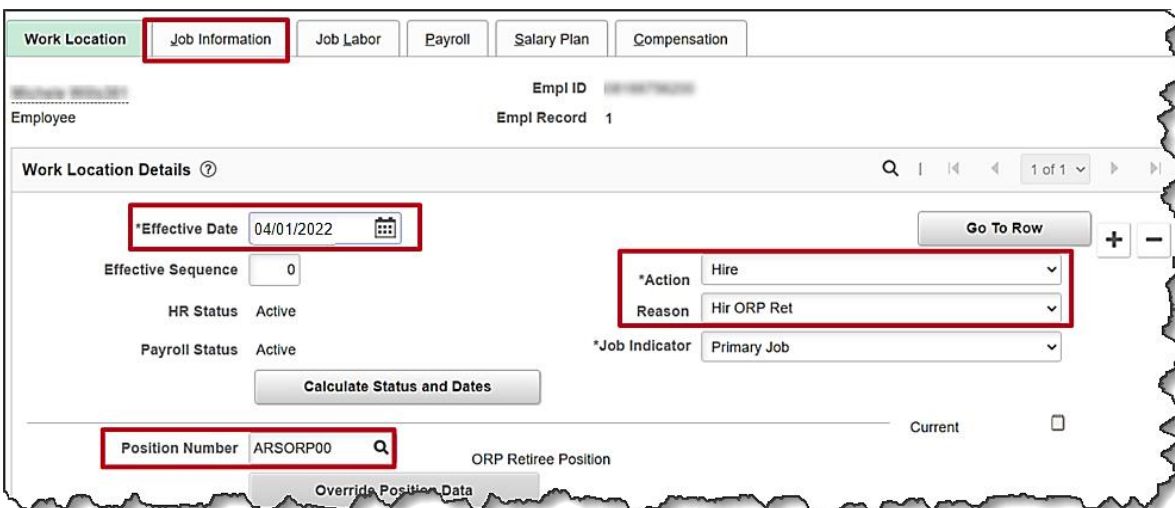


11. Answer **No**, to the question “Do you wish to open the Job Data associated to this emplid:...”



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

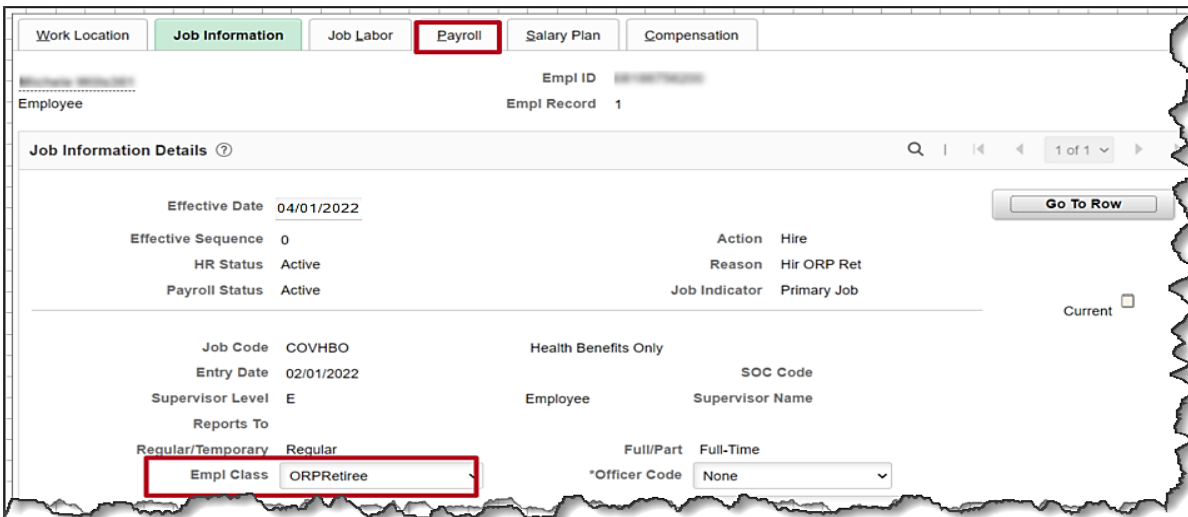
The new Job Record is displayed.



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

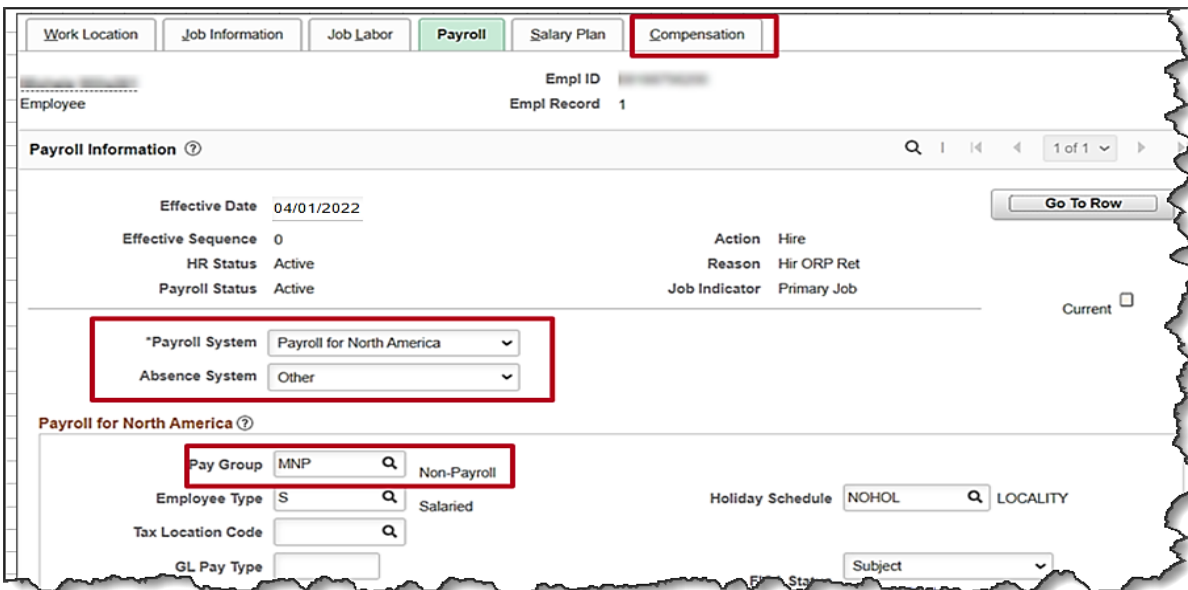
Job Information Details ?

Effective Date 04/01/2022 Go To Row

Effective Sequence 0 Action Hire
HR Status Active Reason Hir ORP Ret
Payroll Status Active Job Indicator Primary Job Current

Job Code COVHBO Health Benefits Only
Entry Date 02/01/2022 SOC Code
Supervisor Level E Employee Supervisor Name
Reports To
Regular/Temporary Regular Full/Part Full-Time
Empl Class ORPRetiree *Officer Code None

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 Go To Row

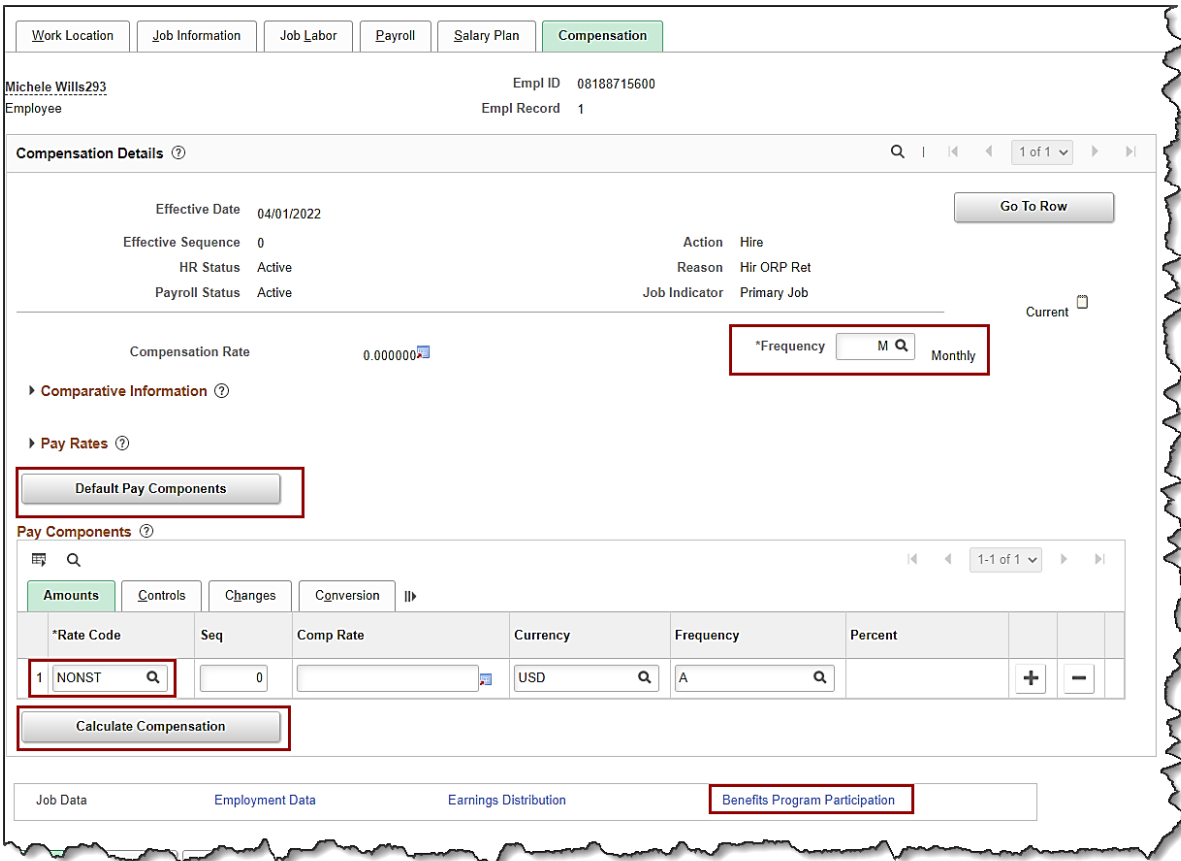
Effective Sequence 0 Action Hire
HR Status Active Reason Hir ORP Ret
Payroll Status Active Job Indicator Primary Job Current

*Payroll System Payroll for North America
Absence System Other

Payroll for North America ?

Pay Group MNP Non-Payroll
Employee Type S Salaried
Tax Location Code
GL Pay Type
Holiday Schedule NOHOL LOCALITY
Subject

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 ?

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 ?

Pay Rates ?

Default Pay Components

Pay Components ?

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 ?
1 of 1

Benefit Record Number 0 Go To Row

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 Benefits Administration Current

Benefits Employee Status Active

Annual Benefits Base Rate USD [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 ? 1 of 1 View All

*Effective Date 11/29/2021 Currency Code USD + -

*Benefit Program PSX Sys delivered empty Ben Pgm

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

OK
Cancel
Apply
Refresh

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.