



Separation Statuses Overview

The Separate Employee business process captures an employee's departure from an agency and, in some instances, the end of state service. Separation may be classified as voluntary (e.g., retirement, resignation) or involuntary (e.g., disciplinary action, Temporary Workforce Reduction (TWFR), layoff). This business process is applicable to both state agencies and localities in The Local Choice (TLC) program. The Layoff Process will not be covered in this Job Aid. For further information on the Layoff Process, see the Job Aid titled **HR351_Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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

Prior to beginning this process, review the Job Aid titled **HR351_Using a Checklist**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

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

Involuntary

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

Voluntary

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

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

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

- Benefit status is updated in Cardinal Benefits (BN); 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



Human Resources Job Aid

HR351_Separation Statuses

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_Managing Terminations and Transfers** for more details. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

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

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Revision History

| Revision Date | Summary of Changes |
|---------------|---|
| 3/1/2025 | Updated the screenshots of the Search pages (<u>Section 1</u> , after Step 1; <u>Section</u> <u>2</u> ; after Step 1; <u>Section 3</u> , after Step 1; <u>Section 4</u> , after Step 1; <u>Section 5</u> , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid. |



Termination - Voluntary

| Step | Action |
|------|---|
| 1. | Navigate to the Job Data page using the following path: |
| | NavBar > Menu > Workforce Administration > Job Information > Job Data |

The Job Data Find an Existing Value page displays.

| | Job Data |
|---|---|
| Find an Existing Val | ue |
| ✓ Search Criteria Enter any information you have | ve and click Search. Leave fields blank for a list of all values. |
| 🔁 Recent Searches | Choose from recent searches V Saved Searches Choose from saved searches V |
| | Empl ID begins with V |
| | Empl Record = v |
| | Name begins with V |
| | Last Name begins with V |
| Seco | nd Last Name begins with 🗸 |
| Alternate Ch | aracter Name begins with V |
| | Middle Name begins with V |
| | Show fewer options □ Assume that the second s |
| | Case Sensitive Include History Correct History |
| | |
| "Overview o | formation pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Job Aids under Learning . |
| Enter the e | mployee's Employee ID in the Empl ID field. |
| | s can also search for the applicable employee using the various Name fields if t D is not known. |
| Empl ID | begins with 🗸 |
| Click the In | clude History checkbox option. |
| | |



Human Resources Job Aid

| Step | Action | | | | | | | | | | |
|------------------|---|--|--|--|--|--|--|--|--|--|--|
| 4. | Click the Search button. | | | | | | | | | | |
| | Clear | | | | | | | | | | |
| The Job I | The Job Data page for the employee displays (Work Location tab). | | | | | | | | | | |
| | Work Location Job Information Payroll Salary Plan Compensation | | | | | | | | | | |
| | Employee Empl Record 0 | | | | | | | | | | |
| | Work Location Details ③ Q I I I I I I I I I I I I I I I I I I | | | | | | | | | | |
| | *Effective Date 07/12/2024 💼 Go To Row 🕂 🗖 | | | | | | | | | | |
| | Effective Sequence 0 *Action Hire v | | | | | | | | | | |
| | HR Status Active Reason New Hire Payroll Status Active *Job Indicator Primary Job | | | | | | | | | | |
| | Current | | | | | | | | | | |
| | Position Number CJSTRN01 Q Analyst | | | | | | | | | | |
| | Position Entry Date | | | | | | | | | | |
| 5. | Click the Add a New Row icon (+) to add a new effective dated row. | | | | | | | | | | |
| | Go To Row - | | | | | | | | | | |
| | *Action Hire ~ | | | | | | | | | | |
| | Reason New Hire V | | | | | | | | | | |
| | *Job Indicator Primary Job v | | | | | | | | | | |



| Ste | əp | Action | | | | | |
|-------|--|---|--|--|--|--|--|
| The 🗸 | Job [| Data page refreshes with the new effective dated row displayed. | | | | | |
| | Work | Location Job Information Payroll Salary Plan Compensation | | | | | |
| | Employe | ee Empl Record 0 | | | | | |
| | Work Location Details ⑦ Q 4 4 1 of 2 v b b | | | | | | |
| | | *Effective Date 01/16/2025 | | | | | |
| | | Effective Sequence 0 *Action | | | | | |
| | | HR Status Active Reason New Hire | | | | | |
| | | Payroll Status Active *Job Indicator Primary Job | | | | | |
| | | Position Number CJSTRN01 Q Analyst | | | | | |
| | | Override Position Data | | | | | |
| | | Position Entry Date 07/12/2024 | | | | | |
| ĺ | | When a new row is created, the row count increases by one and the Effective Date field displays the current date. | | | | | |
| 6. | | Update the effective date as needed using the Effective Date Calendar icon. | | | | | |
| | | *Effective Date 01/16/2025 | | | | | |
| | | Set the effective date to be one day after the employee's last day worked. The effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll). | | | | | |
| | | If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled HR351_Overview of Effective Dating . This Job Aid can be found on the Cardinal website in Job Aids under Learning . | | | | | |
| 7. | | Click the Action field dropdown button and select "Termination". | | | | | |
| | | *Effective Date 01/16/2025 | | | | | |
| | | Effective Sequence 0 *Action | | | | | |
| | | HR Status Inactive Reason | | | | | |
| 8. | | Click the Reason field dropdown button and select the applicable reason. | | | | | |
| | | *Effective Date 01/16/2025 | | | | | |
| | | Effective Sequence 0 *Action | | | | | |
| | | HR Status Inactive Reason Kesignation | | | | | |



| Step | Action |
|------|--|
| i | 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.

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

| | Work Location | Job Information | Job <u>L</u> abor | Payroll | <u>S</u> alary Plan | <u>C</u> ompensa | ation | | | |
|-----|---|---------------------|--|-----------------|--------------------------|-------------------|-------|--|--|--|
| | Employee | | | I | Empl ID Empl Record (|) | | | | |
| | Work Location Details ⑦ Q I I I I I I I I I I I I I I I I I I | | | | | | | | | |
| | | | v/2025 | | | *Action Reason | _ | Go To Row + - | | |
| | Pa | yroll Status Term | inated Calculate Statu | s and Dates | * | lob Indicator | Prima | ary Job 🗸 | | |
| | | | CJS00150 Q Victims Services Section Mgr. Override Position Data | | | | | Current | | |
| | Position | Entry Date 06/25 | 5/2018 sition Managemei | nt Record | | | | | | |
| | Regulat | ory Region USA | | United | d States | | | | | |
| | | Company CJS | | Dept | of Criminal Justic | e Svcs | | | | |
| | Bu | siness Unit 1400 | 0 | Dept | of Criminal Justic | e Svcs | | | | |
| | 1 | Department 1033 | 0 | Victim | ns Services | | | | | |
| 9. | "Termin | ated". Status In | HR Statu | s displa | ays as "Ir | nactive' | ' and | nd the Payroll Status displays as | | |
| 10. | Click the | e Save bu | itton. | | | | - | | | |
| | Save | Returr | n to Search | Noti | ify Re | efresh | | | | |



| Step | Action | | | | | | | | |
|-----------|--|--|--|--|--|--|--|--|--|
| | If a Termination Action Reason of "Death" or "Death with Dependent" is selected, the de date on the employee's Personal Record is updated, and the Death Warning Message displays in a pop-up window. | | | | | | | | |
| 1 | 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 | | | | | | | | |
| 11. | Click the OK but | ton. | | | | | | | |
| | _ | on personal data gets updated for the current transaction. (1000,1471) data gets updated for the current transaction. | | | | | | | |
| The Job D | Data page redispla | ays. | | | | | | | |
| | Work Location Job Informa | ation Job Labor Payroll Salary Plan Compensation | | | | | | | |
| | Employee | Empl ID Empl Record 0 | | | | | | | |
| | Work Location Details ⑦ | | | | | | | | |
| | *Effective Date | | | | | | | | |
| | Effective Sequence | 0 *Action Termination ~ | | | | | | | |
| | Payroll Status | | | | | | | | |
| | Position Number | CJS00150 Q Victims Services Section Mgr. | | | | | | | |
| | Position Entry Date | Override Position Data 06/25/2018 Position Management Record | | | | | | | |
| | Regulatory Region | | | | | | | | |
| | | CJS Dept of Criminal Justice Svcs 14000 Dept of Criminal Justice Svcs | | | | | | | |
| | Department | | | | | | | | |
| | Department Entry Date | | | | | | | | |
| | | CENT1 Washington Building DCJS Q Dept of Criminal Justice Serv. Date Created 01/31/2025 | | | | | | | |
| | Last Start Date | 05/14/2012 Termination Date 01/15/2025 STD Claim | | | | | | | |
| | Last Date Worked | Override Last Date Worked Layoff Notice | | | | | | | |
| | Turn Off Au | 01/15/2025 | | | | | | | |
| | ○ Yes | ® No | | | | | | | |



| Step | Action |
|------|---|
| İ | The employee's email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. Access is provided to Cardinal for 18 months after the termination date. |
| 12. | Navigate to the Modify a Person page using the following navigation: NavBar > Menu > Workforce Administration > Personal Information > Modify a Person |

The **Modify a Person** page for the employee displays (**Biographical Details** tab).

| Γ | Biographical Details Contact Information Regional VA Person Info |
|-----------|---|
| | |
| | Person ID |
| | Name Q I I I I I I I I View All |
| - | Effective Date 09/23/2022 Format Type English Display Name View Name |
| | Biographic Information |
| | Date of Birth 10/04/1976 Tears 48 Months 3 |
| | Date of Death III |
| | Birth State Q |
| | Birth Location |
| | Biographical History Q I I I I I I I I View All |
| | *Effective Date 09/23/2022 |
| | *Highest Education Level Masters Level Degree *Marital Status Married As of 09/23/2022 |
| | Full-Time Student |
| Click the | Contact Information tab. |
| Biograp | hical Details Contact Information Regional VA Person Info |



| Step | Action | | | | | | | | | | |
|---|---|-------------------------------------|--|---|--|---|----------------------------------|--------------|-------------|--|--|
| The Contact Information page displays. | | | | | | | | | | | |
| | Biographical Details Contact Information Regional VA Person Info | | | | | | | | | | |
| | | | | | | | | | | | |
| | Empl ID Current Addresses | | | | | | | | | | |
| | □□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□□ | | | | | | | | п | | |
| | Address Type As Of Date Status Address | | | | | | | | | | |
| | | Home | 03/24/2022 | A | 100 MAIN ST RICHMOND, VA 9999 Prince George | 9 | View Address Detail | + - | ·] | | |
| | | Phone Informa | tion | | | | | | | | |
| | | E Q | | | | ∢ | | ▶ View All | | | |
| | | *Phone Type | | Telephone | | Extension | Preferred | | _ | | |
| | | Business | ~ | 555/555-5555 | | | | + - | 1 | | |
| | | Mobile | ~ | 555/555-5555 | | | | + - | | | |
| | | Home | ~ | 555/555-5555 | | | | + - | | | |
| | | Email Option | Selection | | | | | | | | |
| | | @ Ag | ency Provided Er | nail O Pe | nding Agency Provide | I Email O Emplo | yee Provided Email | | | | |
| | | 1. Agency Provid 2. When no emai | ed Email and Emp I address is availal | loyee Provided Em ble, select applicab | ail must be a valid email le email option and ALV | address that is unique to /AYS use noemail@virgi | the employee, except: nia.gov | | | | |
| | | Email Address | es | | | | | | | | |
| | | *Email Type | | *Email Addres | s | | Preferred | | | | |
| | | Business | ~ | | | | | + - | | | |
| | | L | | | | | | | | | |
| 14. | | | ail Optio | on Selec | tion section | n, click the | Employee F | Provided | Email radio | | |
| | butto | n option. | | | | | | | | | |
| | Email | Option Selec | tion | | | | | | | | |
| | Agency Provided Email O Pending Agency Provided Email Employee Provided Email | | | | | | | | | | |
| | | | | | | | | | | | |
| 15. | | | a New F | Row icor | n (+) to add | a new ema | ail address. | | | | |
| | *Email | Addresses Type | | *Email Address | 3 | | Preferre | d | | | |
| | | | | | - | | ¬ | | | | |
| | Business V | | | | | | | | | | |



| Step | Action |
|------|--|
| 16. | Click the Email Type dropdown button and select "Personal". |
| | Email Addresses *Email Type *Email Address Preferred Business bike.run@doa.virginia.gov Image: Comparison of the second of |
| 17. | Enter the personal email address in the Email Address field. |
| | *Email Type *Email Address Preferred |
| | Business Image: state st |
| | |
| 18. | Check the Preferred checkbox option. |
| | *Email Type *Email Address Preferred |
| | Business 🗸 |
| | Personal 🗸 janedoe@zgmail.com |
| 19. | Click the Save button. |
| | Save Return to Search Previous in List Next in List Notify Refresh |



| Step | Action | | | | | | | | |
|----------|-------------------------------|-------------------------------|-----------------|---|--|--|---------|----------|----------------------------------|
| The Cont | act Informatio | on tab ret | reshes. | | | | | | |
| | Biographical | Details Cont | act Information | Regional VA | Person Info | | | | |
| | 2.9.4. | | | | | Empl ID | | | |
| | Current Addres | sses | | | | Empro | | | |
| | ■ Q | | | | | I I-1 of 1 ♥ | | View All | |
| | Address Type | As Of Date | Status | Address | | | | | |
| | Home | 03/24/2022 | A | 100 MAIN ST RICHMOND, VA 9999 Prince George | 99 | View Address Detail | + | - | |
| | Phone Informa | tion | | | | | | | |
| | E Q | | | | H | 1-3 of 3 🗸 🕨 | ▶ Vi | ew All | |
| | *Phone Type | | Telephone | | Extension | Preferred | | | |
| | Business | ~ | 555/555-5555 | | | | + | - | |
| | Mobile | ~ | 555/555-5555 | | | | + | | |
| | Home | ~ | 555/555-5555 | | | | + | - | |
| | Email Option | Selection ency Provided En | nail O Pe | nding Agency Provide | d Email 💽 Empl | oyee Provided Email | | | |
| | | | | | il address that is unique t WAYS use noemail@virg | o the employee, except: inia.gov | | | |
| | Email Address | es | | | | | | | |
| | *Email Type | | *Email Addres |)S | | Preferred | | | |
| 1 | Personal | ~ | janedoe@zgm | nail.com | | | + | - | |
| 20. | Run the Emp | oloyee A | ctivity R | eport for th | ne employee | e using the follo | wing | navi | gation path: |
| | NavBar > Me Activity Rep | | orkforce | Administr | ation > Job | Information : | > Rep | orts | > Employee |
| 21. | Print the report requests. | ort and pl | ace the | printed tran | saction in th | ne employee file | e for t | future | e audit |
| | | efer to the | HCM R | eports Cat | | tivity Report an HCM Reports | | | es used to run an be found on |



Termination – Involuntary (except Layoff)

| Step | Action |
|------|---|
| 1. | Navigate to the Job Data page using the following path: |
| | NavBar > Menu > Workforce Administration > Job Information > Job Data |

The Job Data Find an Existing Value page displays.

| ← Cardinal Homepage | Job Data |
|---|--|
| Find an Existing Va | lue |
| ✓ Search Criteria Enter any information you have | have and click Search. Leave fields blank for a list of all values. |
| 🕙 Recent Searches | Choose from recent searches V 🖉 Saved Searches Choose from saved searches V |
| | Empl ID begins with V |
| | Empl Record = v |
| | Name begins with v |
| | Last Name begins with V |
| Seco | ond Last Name begins with V |
| Alternate C | haracter Name begins with V |
| | Middle Name begins with V |
| | Show fewer options Case Sensitive Include History Correct History |
| | Search Clear |
| | |
| "Overview | nformation pertaining to the Cardinal HCM Search pages, refer to the Job Aid til of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Job Aids under Learning. |
| Enter the E | Employee's ID in the Empl ID field. |
| ▼ Search Criteri | a |
| | Empl ID begins with |
| | Name begins with V |
| | |
| | also search by name using the corresponding fields. However, it is recommend Employee ID as it is a unique identifier for each employee. |
| to use the | also search by name using the corresponding fields. However, it is recommend Employee ID as it is a unique identifier for each employee. |
| to use the | Employee ID as it is a unique identifier for each employee. |



| Step | Action | |
|----------------|--|--|
| The Job | Data page for the employee displays (Work Location tab). | |
| | Work Location Job Information Payroll Salary Plan Compensation | |
| | Empl ID Employee Empl Record | |
| | Work Location Details ⑦ Q I d d 1 of 1 ~ > > | |
| | *Effective Date 07/12/2024 | |
| | Effective Sequence 0 *Action Hire ~ | |
| | Payroll Status Active *Job Indicator | |
| | Position Number CJSTRN01 Q Analyst | |
| | Override Position Data Position Entry Date | |
| | 07/12/2024 Position Management Record | |
| 4. | Click the Add a New Row icon (+) to add a new effective dated row. | |
| | Go To Row *Action Hire *Action New Hire *Job Indicator Primary Job | |
| The Job | Data page refreshes with the new effective dated row displayed. | |
| Wo | Job Information Payroll Salary Plan Compensation | |
| Empl | loyee Empl Record 0 | |
| Wo | ork Location Details ⑦ Q I I 1 of 2 v V | |
| | *Effective Date 01/16/2025 💼 Go To Row + - | |
| | Effective Sequence 0 *Action Hire | |
| | HR Status Active Reason New Hire Payroll Status Active *Job Indicator Primary Job | |
| | Position Number CJSTRN01 Q Analyst | |
| | Position Entry Date 07/12/2024 Position Management Record | |
| i | When a new row is created, the row count increases by one and the Effective Date field displays the current date. | |



| Step | Action |
|------|---|
| 5. | Update the effective date as needed using the Effective Date Calendar icon. |
| | *Effective Date 01/16/2025 |
| | Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll). |
| 1 | If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled HR351_Overview of Effective Dating . This Job Aid can be found on the Cardinal website in Job Aids under Learning . |
| 6. | Click the Action field dropdown button and select "Termination". |
| | *Effective Date 01/16/2025 Effective Sequence 0 *Action * HR Status Inactive Reason * |
| 7. | Click the Reason field dropdown button and select the applicable reason. |
| | *Effective Date 01/16/2025 Effective Sequence 0 HR Status Inactive Reason Invol-Unsatisf Perf on Prob |
| i | 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 . |



Human Resources Job Aid

| Step | Action |
|-----------|---|
| The Job [| Data page refreshes. |
| | er selecting the Action and Action Reason, the HR Status and Payroll Status fields ally update. |
| | Work Location Job Labor Payroll Salary Plan Compensation |
| | Empl ID |
| | Employee Empl Record 0 Work Location Details ⑦ Q 1 of 7 v |
| | |
| | *Effective Date 01/16/2025 |
| | HR Status Inactive Reason Invol-Unsatisf Perf on Prob |
| | Payroll Status Terminated *Job Indicator Primary Job |
| | Calculate Status and Dates |
| | Position Number CJS00345 Q. VOCA Administrator |
| | Position Entry Date 03/04/2019 03/04/2019 |
| | Position Management Record Regulatory Region USA United States |
| | Company CJS Dept of Criminal Justice Svcs |
| | Business Unit 14000 Dept of Criminal Justice Svcs Department 10330 Victims Services |
| | Department Entry Date 12/10/2013 |
| | Location CENT1 Washington Building Establishment ID DCJS Q Dept of Criminal Justice Serv. Date Created 01/31/2025 |
| | |
| 8. | Validate that the HR Status displays as "Inactive" and the Payroll Status displays as |
| | "Terminated". |
| | HR Status Inactive |
| | |
| | Payroll Status Terminated |
| 9. | Click the Save button. |
| | Save Return to Search Notify Refresh |
| | |
| i | The employee's email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay history and W2s. Access is provided to Cardinal for 18 months after the termination date. |
| | |
| 10. | Navigate to the Modify a Person page using the following navigation: |
| | NavBar > Menu > Workforce Administration > Personal Information > Modify a Person |



| Step | Action |
|-----------------|--|
| The Modi | a Person page for the employee displays (Biographical Details tab). |
| | Biographical Details Contact Information Regional VA Person Info |
| | Person ID |
| | Name Q I I I I View All |
| | Effective Date 09/23/2022 Format Type English Display Name View Name |
| | Biographic Information |
| | Date of Birth 10/04/1976 THE Years 48 Months 3 Date of Death THE HERE |
| | Birth Country USA Q United States |
| | Birth State Q |
| | Birth Location |
| | Biographical History Q I I I I I I I View All |
| | *Effective Date 09/23/2022 IIII *Gender Female ~ |
| | *Highest Education Level Masters Level Degree *Marital Status Language Code |
| | Alternate ID |
| 11. | Click the Contact Information tab. |
| | Biographical Details Contact Information Regional VA Person Info |



| Step | Actio | n | | | | | | | |
|----------|----------|--|---|--|--|---|---|------------|----------------|
| The Cont | act Info | ormatio | 1 tab dis | plays. | | | | | |
| | | Biographical | | tact Information | Regional VA | Person Info | | | |
| | | Diographical | | | | | 5 | | |
| | | Current Addres | 5565 | | | | Empl ID | | |
| | | ■ Q | | | | [4 | (| ▶ Vie | iew All |
| | | Address Type | As Of Date | Status | Address | | | | |
| | | Home | 03/24/2022 | A | 100 MAIN ST RICHMOND, VA 99999 Prince George | • | View Address Detail | + | - |
| | | Phone Informa | tion | | | | ↓ 1-3 of 3 ∨ | ▶ Viev | w All |
| | | *Phone Type | | Telephone | | Extension | Preferred | | |
| | | Business | ~ | 555/555-5555 | | | | + | - |
| | | Mobile | ~ | 555/555-5555 | | | D | + | - |
| | | Home | ~ | 555/555-5555 | | | | + | - |
| | | Email Option | Selection | | | | | | |
| | | @ Ag | ency Provided E | mail O Pe | nding Agency Provideo | Email O Employ | yee Provided Email | | |
| | | Agency Provid When no email | ed Email and Emp I address is availa | bloyee Provided Em ble, select applicab | ail must be a valid email le email option and ALW | address that is unique to AYS use noemail@virgir | the employee, except: nia.gov | | |
| | | Email Address | | <i>,</i> | · | 0.5 | 2 | | |
| | | *Email Type | | *Email Addres | s | | Preferred | | |
| | | Business | ~ | | | | | + - | - |
| | | | | | | L | | | |
| 12. | | r the Em n option. | ail Opti | on Selec | tion sectio | n, click the | Employee P | Provide | ed Email radio |
| | Email | Option Selec | tion | | | | | | |
| | | | Provided Em | ail O | Pending Agency F | Provided Email | Employee Pro | ovided Ema | ail |
| | | | | | | | | | |
| 13. | Click | the Add | a New I | Row icor | n (+) to add | a new ema | il address. | | |
| | Email A | ddresses | | | | | | | |
| | *Email | Туре | | *Email Address | 3 | | Preferred | d | |
| | Busine | ess | ~ | | | | | | + - |



| Step | Action | | | | | |
|------|---|--|--|--|--|--|
| 14. | Click the Email Type field dropdown button and select "Personal". | | | | | |
| | Email Addresses | | | | | |
| | *Email Type *Email Address Preferred | | | | | |
| | Business ✓ bike.run@doa.virginia.gov ☑ | | | | | |
| | Personal | | | | | |
| 15. | Enter the personal email address in the Email Address field. | | | | | |
| | *Email Type *Email Address Preferred | | | | | |
| | Business V | | | | | |
| | Personal | | | | | |
| 16. | Check the Preferred checkbox option. | | | | | |
| | *Email Type *Email Address Preferred | | | | | |
| | Business | | | | | |
| | Personal janedoe@zgmail.com | | | | | |
| 17. | Click the Save button. | | | | | |
| | | | | | | |
| | Save Return to Search Previous in List Next in List Notify Refresh | | | | | |
| 18. | Run the Employee Activity Report for the employee using the following navigation path: | | | | | |
| | NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report | | | | | |
| 19. | 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 . | | | | | |



Long Term Disability Not Working

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

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

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

| Step | Action |
|------|---|
| 1. | Navigate to the Job Data page using the following path: |
| | NavBar > Menu > Workforce Administration > Job Information > Job Data |

The Job Data Find an Existing Value page displays.

| Search Criteria Enter any information you h | ave and click Search. Leave fields blank for a list of all values. |
|--|---|
| Recent Searches | Choose from recent searches V Raved Searches Choose from saved searches V |
| | Empl ID begins with V |
| | Empl Record = v |
| | Name begins with V |
| | Last Name begins with V |
| Sec | ond Last Name begins with V |
| Alternate C | haracter Name begins with V |
| | Middle Name begins with V |
| | A Show fewer options |
| | Case Sensitive Include History Correct History |
| | Search Clear |
| | |



| Step | Action | | | | |
|---------|--|--|--|--|--|
| 2. | Enter the employee's Employee ID in the Empl ID field. | | | | |
| | Note : Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. | | | | |
| | Empl ID begins with V | | | | |
| 3. | Click the Include History checkbox option. | | | | |
| | □ Case Sensitive □ Include History □ Correct History | | | | |
| 4. | Click the Search button. | | | | |
| | Search Clear | | | | |
| The Job | Data page for the employee displays (Work Location tab). | | | | |
| | Work Location Job Information Payroll Salary Plan Compensation | | | | |
| | Employee Empl Record 0 | | | | |
| | Work Location Details () Q I d d lof 1 v b b | | | | |
| | "Effective Date 07/12/2024 Effective Sequence 0 HR Status Active Reason New Hire | | | | |
| | Payroll Status Active *Job Indicator Primary Job Current Image: Current Image: Current | | | | |
| | Position Number CJSTRN01 Q Analyst Override Position Data Position Entry Date 07/12/2024 Position Management Record | | | | |
| 5. | Click the Add a New Row icon (+) to add a new effective dated row. | | | | |
| | Go To Row + - | | | | |
| | *Action Hire ~ | | | | |
| | Reason New Hire *Job Indicator Primary Job | | | | |
| | *Job Indicator Primary Job | | | | |



| St | ер | Action |
|-------|---------|---|
| The . | Job [| Data page refreshes with the new effective dated row displayed. |
| [| Work | Location Job Information Payroll Salary Plan Compensation |
| | Employe | Empl ID Empl Record 0 |
| | Work | Location Details ⑦ Q I I I I I I I I I I I I I I I I I I |
| | | *Effective Date 01/16/2025 |
| | | Effective Sequence 0 *Action Hire * |
| | | HR Status Active Reason New Hire Payroll Status Active *Job Indicator Primary Job |
| | | Position Number CJSTRN01 Q |
| | | Override Position Data |
| | | Position Entry Date 07/12/2024 |
| ĺ | | When a new row is created, the row count increases by one and the Effective Date field displays the current date. |
| 6 | - | Update the effective date as needed using the Effective Date Calendar icon. |
| | | *Effective Date 01/16/2025 |
| i | | Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll). |
| | | If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled HR351_Overview of Effective Dating . This Job Aid can be found on the Cardinal website in Job Aids under Learning . |
| 7 | | Click the Action dropdown button and select "Termination". |
| | | *Action Termination |
| | | Reason |
| 8 | - | Click the Reason dropdown button and select "Termination - LTD". |
| | | *Action Termination |
| | | Reason Termination - LTD |
| | | |





Step Action For furt

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.

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

| [| Work Location Job Labor Payroll Salary Plan Compensation | | | | | |
|----|---|--|--|--|--|--|
| | Employee Empl Record 1 | | | | | |
| | Work Location Details () Q I I I I I I I I I I I I I I I I I I | | | | | |
| | *Effective Date 01/16/2025 Dob History Go To Row + - Effective Sequence 0 *Action Termination - LTD + HR Status Inactive Reason Termination - LTD + Payroll Status Terminated *Job Indicator Primary Job | | | | | |
| | Position Number CJS00335 Q Div Dir Licensure & Regulation Override Position Data | | | | | |
| | 02/10/2023 Position Management Record Regulatory Region USA Company CJS Dept of Criminal Justice Svcs | | | | | |
| | Business Unit 14000 Dept of Criminal Justice Svcs Department 10610 Licensure Div Dir Department Entry Date 02/10/2023 Location CENT1 Washington Building Establishment ID DCJS DCJS Depart of Criminal Justice Sory | | | | | |
| | Last Start Date 02/10/2023 Termination Date 01/15/2025 STD Claim Number | | | | | |
| l | Last Date Worked 01/15/2025 | | | | | |
| 9. | Validate that the HR Status displays as "Inactive" and the Payroll Status displays as "Terminated". | | | | | |
| | HR Status Inactive Payroll Status Terminated | | | | | |
| 0. | Click the Save button. | | | | | |
| | Save Return to Search Notify Refresh | | | | | |



Retirement – VRS Retiree

| Step | Action |
|------|---|
| 1. | Navigate to the Job Data page using the following path: |
| | NavBar > Menu > Workforce Administration > Job Information > Job Data |

The Job Data Find an Existing Value page displays.

| Find an Existing Value Search Criteria Enter any information you have and dick Search. Leave fields blank for a list of all values. Image: Search Search Search. Leave fields blank for a list of all values. Image: Search Search Search. Leave fields blank for a list of all values. Image: Search Search Search. Leave fields blank for a list of all values. Image: Search S | \leftarrow Cardinal Homepage | Job Data |
|---|--------------------------------|--|
| Enter any information you have and click Search. Leave fields blank for a list of all values. Image: Search Searches Precent Searches Choose from sound searches Image: Search Searches Empl ID Empl ID Second Last Name Engine with Last Name Engine with Last Name Engine with Include History Correct History Second Last Name Engine with Include History Correct History Second Last Name Vebsite in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID begins with v Empl ID begins with v Click the Include History checkbox option. | Find an Existing Va | lue |
| Empt ID begins with Empt Record Impl Record Impl Record Impl Record Name begins with Last Name begins with Attendet Character Name begins with Middle Name begins with Second Last Name begins with Middle Name begins with Second Last Name begins with Middle Name begins with Second Last Name begins with Case Sensitive Include History Correct History Correct History Correct New options Correct History Correct History Correct History Chart the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID begins with Empl ID begins with Click the Include History checkbox option. | | ave and click Search. Leave fields blank for a list of all values. |
| Empl Record Impl Record Name legins with Impl Record Last Name legins with Impl Record Last Name legins with Impl Record Second Last Name legins with Impl Record Alternate Character Name legins with Impl Record Middle Hame legins with Impl Record Second Last Name legins with Impl Record Second Last Name legins with Impl Record Second Last Name legins with Impl Record Second Case Sensitive Include History Correct History Second Clear | 🕘 Recent Searches | Choose from recent searches V Saved Searches Choose from saved searches V |
| Name begins with image: | | Empl ID begins with V |
| Last Name begins with • Second Last Name begins with • Alternate Character Name begins with • Middle Name begins with • • Show fewer options • • Case Sensitive Include History Second Clear For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID begins with • Empl ID begins with • Click the Include History checkbox option. | | Empl Record = |
| Second Last Name begins with • Alternate Character Name begins with • Middle Name begins with • • Show fewer options • • Case Sensitive • Include History • Second Click the Include History • Click the Include History checkbox option. • | | Name begins with • |
| Atternate Character Name begins with Middle Name begins with Show fewer options Case Sensitive Case Sensitive Include History Correct History Search Por more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID begins with Empl ID begins with | | Last Name begins with V |
| Middle Name begins with Show fewer options Case Sensitive Include History Clear Clear For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID begins with Empl ID begins with Click the Include History checkbox option. | Seco | nd Last Name begins with V |
| Show fewer options Case Sensitive Search Ciear For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID begins with Empl ID begins with Click the Include History checkbox option. | Alternate Cl | haracter Name begins with V |
| Case Sensitive Include History Correct History Search Clear For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID is not known. Empl ID begins with Click the Include History checkbox option. | | Middle Name begins with v |
| For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Empl ID is not known. Empl ID begins with Click the Include History checkbox option. | | |
| "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID begins with < | | |
| "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning. Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID begins with Click the Include History checkbox option. | | |
| Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID begins with Click the Include History checkbox option. | "Overview | of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal |
| Employee ID is not known. Empl ID begins with Click the Include History checkbox option. | Enter the e | mployee's Employee ID in the Empl ID field. |
| Click the Include History checkbox option. | | |
| | Empl ID | begins with 🖌 |
| | Click the Ir | clude History checkbox option. |
| Case Sensitive Include History | | ensitive 🔲 Include History 🛛 Correct History |



Human Resources Job Aid

| Step | Action | | | | | |
|------------------|---|--|--|--|--|--|
| 4. | Click the Search button. | | | | | |
| | Clear | | | | | |
| The Job I | Data page for the employee displays (Work Location tab). | | | | | |
| | Work Location Job Information Payroll Salary Plan Compensation | | | | | |
| | Employee Empl Record 0 | | | | | |
| | Work Location Details () Q H 4 1of1 > >> | | | | | |
| | *Effective Date 07/12/2024 💼 Go To Row 🕂 🗖 | | | | | |
| | Effective Sequence 0 *Action Hire v | | | | | |
| | HR Status Active Reason New Hire ✓ Payroll Status Active *Job Indicator Primary Job ✓ | | | | | |
| | Position Number CJSTRN01 Q | | | | | |
| | Override Position Data | | | | | |
| | Position Entry Date | | | | | |
| 5. | Click the Add a New Row icon (+) to add a new effective dated row. | | | | | |
| | Go To Row - | | | | | |
| | *Action Hire ~ | | | | | |
| | Reason New Hire ~ | | | | | |
| | *Job Indicator Primary Job ~ | | | | | |



| Ste | ер | Action | | | | | |
|-------|---------|--|--|--|--|--|--|
| The . | Job [| Data page refreshes with the new effective dated row. | | | | | |
| | Work | Location Job Information Payroll Salary Plan Compensation | | | | | |
| | | Empl ID | | | | | |
| | Employe | | | | | | |
| | Work | Location Details ⑦ Q I I I I I I I I I I I I I I I I I I | | | | | |
| | | *Effective Date 01/16/2025 | | | | | |
| | | HR Status Active Reason New Hire V | | | | | |
| | | Payroll Status Active *Job Indicator Primary Job | | | | | |
| | | Position Number CJSTRN01 Q Analyst | | | | | |
| | | Override Position Data | | | | | |
| | | Position Entry Date 07/12/2024 | | | | | |
| ĺ | | When a new row is created, the row count increases by one and the Effective Date field displays the current date. | | | | | |
| 6. | | Update the effective date as needed using the Effective Date Calendar icon. | | | | | |
| | | *Effective Date 01/16/2025 | | | | | |
| ĺ | | Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled HR351_Overview of Effective Dating . This Job Aid can be found on the Cardinal website in Job Aids under Learning . | | | | | |
| 7. | | Click the Action dropdown button and select "Retirement". | | | | | |
| | | *Action Retirement Reason | | | | | |
| 8. | | Click the Reason dropdown button and select the applicable reason. | | | | | |
| | | *Action Retirement | | | | | |
| | | Reason Service Retirement | | | | | |
| | | | | | | | |





Step Action

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.

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

| | Work Location Job Information Job Labor Payroll Salary Plan Compensation | | | | | |
|-----|---|-----|--|--|--|--|
| | Empl ID Employee Empl Record 0 | | | | | |
| | Work Location Details 🕐 🔍 🗌 🕹 🚺 | | | | | |
| | *Effective Date 01/16/2025 | | | | | |
| | Effective Sequence 0 *Action Retirement | | | | | |
| | Payroll Status Retired *Job Indicator Primary Job | | | | | |
| | Position Number CJS00170 Q Compliance Enforcement&Trg Mgr | | | | | |
| | Position Entry Date 06/22/2012 Position Management Record | | | | | |
| | Regulatory Region USA United States | | | | | |
| | Company CJS Dept of Criminal Justice Svcs Business Unit 14000 Dept of Criminal Justice Svcs | | | | | |
| | Department 10620 Compliance Enforcement Trainin Department Entry Date 08/29/2005 | | | | | |
| | Location CENT1 Washington Building Establishment ID DCJS Q Dept of Criminal Justice Serv. Date Created 02/03/2025 | | | | | |
| | Last Start Date 06/22/2012 Termination Date 01/15/2025 STD Claim | | | | | |
| | Override Last Date Worked Layoff Notice Date Date Last Date Worked 01/15/2025 | | | | | |
| 9. | Validate that the HR Status displays as "Inactive" and the Payroll Status displays as "Retired". | | | | | |
| | Payroll Status Retired | | | | | |
| 10. | Click the Save button. | | | | | |
| | Save Return to Search Notify Refresh | | | | | |
| 1 | The employee's email address must be updated in Cardinal after separation for the employee, their surviving family, or retirees, to gain access to Cardinal to view pay histo and W2s. Access is provided to Cardinal for 18 months after the termination date. | ory | | | | |



| Step | Action |
|------|---|
| 11. | Navigate to the Modify a Person page using the following navigation: |
| | NavBar > Menu > Workforce Administration > Personal Information > Modify a Person |

The Modify a Person page for the employee displays (Biographical Details tab).

| | | | Pers | on ID | |
|------------------------|----------------------------|---------------|--------------|----------------|----------|
| Name | | Q | ◀ 1 of 1 ∨ | • | View All |
| Effective D | ate 09/23/2022 | | | | +- |
| Format T | ype English | _ | | | |
| Display Na | me POLE VAULT | | View Name | | |
| Biographic Information | | | | | |
| Date of | Birth 08/15/1953 | Years 71 | Months 5 | | |
| Date of D | leath 🚺 | | | | |
| Birth Cou | untry USA Q | United States | | | |
| Birth | State Q |] | | | |
| Birth Loca | ation | | Exclude Cont | act Informatio | on? |
| Biographical History | | QI | | | View All |
| *Effective | Date 09/23/2022 | | | | + - |
| *Gei | nder Male 🗸 | | | | |
| *Highest Education L | evel Bachelors Level Degre | • • | | | |
| *Marital St | atus | ~ | As of 09/23 | 3/2022 📰 | |
| lick the Contact I | nformation tab. | | | | |



| Step | Action | | | | | | | |
|-----------|--|--|-----------------|---|------------------------|----------------------------------|----------------|--|
| The Conta | Contact Information tab displays. | | | | | | | |
| | Biographical | Biographical Details Contact Information Regional VA Person Info | | | | | | |
| | | | | | | Empl ID | | |
| | Current Addres | SSES | | | [4 | 1-1 of 1 🗸 🕨 | ▶ View All | |
| | Address Type | As Of Date | Status | Address | | | | |
| | Home | 09/23/2022 | A | 100 MAIN ST RICHMOND, VA 9999 Henrico | 9 | View Address Detail | + - | |
| | Phone Informa | tion | | | 14 | ✓ 1-2 of 2 ∨ | View All | |
| | *Phone Type | | Telephone | | Extension | Preferred | | |
| | Business | ~ | 555/555-5555 | | | | + - | |
| | Home | ~ | 555/555-5555 | | | | + - | |
| | Email Option | Selection ency Provided En | nail O Pe | nding Agency Provide | d Email O Employ | yee Provided Email | | |
| 13. | Under the button op | | ption Sel | ection sectio | n, click the En | nployee Provide | ed Email radio | |
| | Email Optio | Email Option Selection | | | | | | |
| | 0 | Agency Provided Email O Pending Agency Provided Email Employee Provided Email | | | | | | |
| 14. | Click the Add a New Row icon (+) to add a new email address. | | | | | | | |
| | Email Addresses *Email Type *Email Address | | | | | | | |
| | Business | ~ | · | | | | + - | |
| 15. | Click the Email Type field dropdown button and select "Personal". | | | | | | | |
| | Email Addres | ses | *Email Address | | I | Preferred | | |
| | Business | ~ | bike.run@doa.vi | rginia.gov | | • + | - | |
| | • | | L | | | | | |



| Step | Action | | | | | |
|------|---|--|--|--|--|--|
| 16. | Enter the personal email address in the Email Address field. | | | | | |
| | *Email Type *Email Address Preferred | | | | | |
| | Business V | | | | | |
| | Personal V janedoe@zgmail.com | | | | | |
| 17. | Check the Preferred checkbox option. | | | | | |
| | *Email Type *Email Address Preferred | | | | | |
| | Business | | | | | |
| | Personal v janedoe@zgmail.com | | | | | |
| 18. | Click the Save button. | | | | | |
| | Save Return to Search Previous in List Next in List Notify Refresh | | | | | |
| 19. | Run the Employee Activity Report for the employee using the following navigation path: | | | | | |
| | NavBar > Menu > 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: 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 . | | | | | |



Retirement – ORP Retiree

| Step | Action |
|------|---|
| 1. | Navigate to the Job Data page using the following path: |
| | NavBar > Menu > Workforce Administration > Job Information > Job Data |

The Job Data Find an Existing Value page displays.

| \leftarrow Cardinal Homepage | Job Data |
|---|--|
| Find an Existing Va | ue |
| ✓ Search Criteria Enter any information you have | ave and click Search. Leave fields blank for a list of all values. |
| 🕙 Recent Searches | Choose from recent searches V Raved Searches Choose from saved searches V |
| | Empl ID begins with V |
| | Empl Record = |
| | Name begins with v |
| | Last Name begins with V |
| Seco | nd Last Name begins with V |
| Alternate Ch | haracter Name begins with V |
| | Middle Name begins with V |
| | |
| | Case Sensitive Include History Correct History |
| | |
| "Overview | nformation pertaining to the Cardinal HCM Search pages, refer to the Job Aid ti of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Job Aids under Learning . |
| Enter the e | mployee's Employee ID in the Empl ID field. |
| Note: User | is can also search for the applicable employee using the various Name fields if ID is not known. |
| Empl ID | begins with 🗸 |
| Click the Ir | clude History checkbox option. |
| | ensitive 🔲 Include History 🛛 Correct History |
| | |



Human Resources Job Aid

| Step | Action |
|------------------|---|
| 4. | Click the Search button. |
| | Clear |
| The Job I | Data page for the employee displays (Work Location tab). |
| | Work Location Job Information Payroll Salary Plan Compensation |
| | Employee Empl Record 0 |
| | Work Location Details () Q H 4 1of1 > >> |
| | *Effective Date 07/12/2024 📰 Go To Row 🕂 🗖 |
| | Effective Sequence 0 *Action Hire v |
| | HR Status Active Reason New Hire ✓ Payroll Status Active *Job Indicator Primary Job ✓ |
| | Position Number CJSTRN01 Q |
| | Override Position Data |
| | Position Entry Date |
| 5. | Click the Add a New Row icon (+) to add a new effective dated row. |
| | Go To Row + - |
| | *Action Hire ~ |
| | Reason New Hire ~ |
| | *Job Indicator Primary Job ~ |



| Ste | əp | Action | | | | | | |
|-----|---------|---|--|--|--|--|--|--|
| The | Job [| Data page refreshes with the new effective dated row. | | | | | | |
| | Work | Location Job Information Payroll Salary Plan Compensation | | | | | | |
| | | Empl ID | | | | | | |
| | Employe | | | | | | | |
| | Work | Location Details ⑦ Q I I I I I I I I I I I I I I I I I I | | | | | | |
| | | *Effective Date 01/16/2025 | | | | | | |
| | | HR Status Active Reason New Hire | | | | | | |
| | | Payroll Status Active *Job Indicator Primary Job | | | | | | |
| | | Position Number CJSTRN01 Q Analyst | | | | | | |
| | | Override Position Data | | | | | | |
| | | 07/12/2024 Position Management Record | | | | | | |
| i | | When a new row is created, the row count increases by one and the Effective Date field displays the current date. | | | | | | |
| 6. | | Update the effective date as needed using the Effective Date Calendar icon. | | | | | | |
| | | *Effective Date 01/16/2025 | | | | | | |
| i | | Set the effective date to be one day after the employee's last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll). If an employee's last day is "1/15/2025", the effective date of the termination should be "1/16/2025". For further information on effective dating, see the Job Aid titled | | | | | | |
| | | HR351_Overview of Effective Dating . This Job Aid can be found on the Cardinal website in Job Aids under Learning . | | | | | | |
| 7. | | Click the Action dropdown button and select "Retirement". | | | | | | |
| | | *Action Retirement | | | | | | |
| | | Reason | | | | | | |
| 8. | | Click the Reason dropdown button and select "Retirement – ORP". | | | | | | |
| | | *Action Retirement | | | | | | |
| | | Reason Retirement-ORP ~ | | | | | | |
| | | | | | | | | |





Step Action

i

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.

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

| | Work Location Job Labor Payroll Salary Plan Compensation | | | | | | | |
|-----|--|--|--|--|--|--|--|--|
| | TRACK FIELD Empl ID 00353750000 Employee Empl Record 0 | | | | | | | |
| | Work Location Details (?) | | | | | | | |
| | *Effective Date 01/16/2025 💼 Go To Row 🕇 | | | | | | | |
| | Effective Sequence 0 *Action Retirement | | | | | | | |
| | HR Status Inactive Reason Retirement-ORP Payroll Status Retired *Job Indicator Primary Job | | | | | | | |
| | Position Number C 1900327 Q | | | | | | | |
| | Override Position Data | | | | | | | |
| | Position Entry Date 08/10/2018 | | | | | | | |
| | Regulatory Region USA United States Company CJS Dept of Criminal Justice Svcs | | | | | | | |
| | Business Unit 14000 Dept of Criminal Justice Svcs | | | | | | | |
| | Department 10620 Compliance Enforcement Trainin | | | | | | | |
| | Department Entry Date 06/25/2004 | | | | | | | |
| | Location MOBL2 Fairfax, Manassas - MOB | | | | | | | |
| | Establishment ID DCJS Q Dept of Criminal Justice Serv. Date Created 02/03/2025 | | | | | | | |
| | Last Start Date 08/10/2018 Termination Date 01/15/2025 STD Claim Number | | | | | | | |
| | Override Last Date Worked Layoff Notice | | | | | | | |
| 9. | Validate that the HR Status displays as "Inactive" and the Payroll Status displays as "Retired". | | | | | | | |
| 10. | Click the Save button. | | | | | | | |
| | Save Return to Search Notify Refresh | | | | | | | |
| 1 | Now the agency HR Administrator should hire the employee into the ORP retirement position using a new employment instance. | | | | | | | |



| Step | Action | | | | | | | |
|------------|--|--|--|--|--|--|--|--|
| 11. | Navigate to New Employment Instance page using this path: | | | | | | | |
| | NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance | | | | | | | |
| The follow | ring question will display. | | | | | | | |
| | Kew Employment Instance | | | | | | | |
| | Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91) | | | | | | | |
| | Yes No | | | | | | | |
| 12. | Click the No button to create a new employment instance. | | | | | | | |
| | Kew Employment Instance | | | | | | | |
| | Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91) | | | | | | | |

| | Yes | No | | | |
|----------------|------------|---|--------------------------------------|-----------|----------------|
| The New | Employme | ent Instance page | displays. | | |
| | | Key | New Employment | Instance | |
| | | New Employn | nent Instance | | |
| | | Empl ID | | | |
| | | Empl Record 1 | | | |
| | | | Add Relationship | | |
| 13. | Click the | Add Relationship | button to add job information for th | ne new em | ployee record. |
| | < Biograph | ical Details | New Employment Instance | | |
| | Nev | v Employment Instanc Empl ID Record 1 | e Iationship | | |



| Step | Action | | | | | | |
|---|---|--|--|--|--|--|--|
| The new Job Record for the employee is displayed (Work Location tab). | | | | | | | |
| | Work Location Job Information Job Labor Payroll Salary Plan Compensation | | | | | | |
| | Employee Empl Record | | | | | | |
| | Work Location Details ⑦ Q 1 14 4 1 of 1 v > >1 | | | | | | |
| | *Effective Date 02/03/2025 Effective Sequence 0 HR Status Active Reason Payroll Status Active | | | | | | |
| | Calculate Status and Dates Current Current Override Position Data | | | | | | |
| | Position Entry Date Image: Company in the image: Company interview of Accounts *Business Unit 15100 Department of Accounts *Department Entry Date Image: Company interview of Accounts Image: Company interview of Accounts | | | | | | |
| 14. | The Effective Date field defaults to the current system date. Update this date as needed using the Calendar icon. *Effective Date 01/16/2025 | | | | | | |
| İ | The Action field defaults to "Hire". Do not change. *Action Hire Reason | | | | | | |
| 15. | Click the Reason dropdown button and select "Hire ORP Ret". | | | | | | |



| Step | Action | | | | | | |
|-----------|--|--|--|--|--|--|--|
| 16. | Locate and select the ORP position for the agency using the Position Number Look Up icon. | | | | | | |
| | Note: Enter "%ORP" to search for the ORP Position Number. | | | | | | |
| | Position Number CVAORP00 Q ORP Retiree Position | | | | | | |
| 17. | Click the Job Information tab. | | | | | | |
| | Work Location Job Information Job Labor Payroll Salary Plan Compensation | | | | | | |
| The Job I | nformation tab displays. | | | | | | |

| | | | | | | | | - |
|----------------|------------------------|----------------------|-----------------|-------------------|-------------------|-------------|----------------------|-----|
| Work Location | Job Information | Job <u>L</u> abor | <u>P</u> ayroll | Salary Plan | Compensation | | | |
| | | | | Empl ID | | | | |
| Employee | | | | Empl Record 1 | | | | |
| Job Informatio | - Detaile @ | | | | | | Q 4 4 1of1 V | • • |
| Job momato | ii Details 🕕 | | | | | | | |
| | Effective Date (| 1/16/2025 | | | | | Go To Row | |
| E | ffective Sequence |) | | | Action | Hire | | |
| | HR Status A | | | | Reason | Hir ORP Ret | | |
| | Payroll Status A | Active | | | Job Indicator | Primary Job | Current | |
| | leb Cede | | | | | | | |
| | Job Code Entry Date | ORPHBO 01/16/2025 | | ORP Retiree | \$00 | Code | | |
| | Supervisor Level | | | Employee | Supervisor | | | |
| | Reports To | View Current I | ncumbents | | | | | |
| F | Regular/Temporary | Regular | | Ful | II/Part Part-Time | | | |
| | Empl Class | | ~ | *Officer | Code None | ~ | | |
| | Regular Shift | Not Applicable | | Shift | t Rate | | | |
| | Classified Ind | | | Shift F | actor | | | |
| | olacomod ma | oluooliidu | | | | | | |
| | | | | | | | | |
| Click the | Empl Cla | iss dropd | own b | outton and | select "O | RPRetire | e". | |
| Regular | /Temporary | Regular | | | | | | |
| | | ORPRetiree | | × | | | | |
| | Empi Class | OKEKelliee | | | | | | |
| | | | | | | | | |
| Click the | e Payroll ta | ab. | | | | | | |
| Martil | antian I- | h Information | | lah Lahar | Devrell | Oalany Dian | Componenties | |
| Work Lo | cation Jo | b Information | n J | lob <u>L</u> abor | Payroll | Salary Plan | <u>C</u> ompensation | |
| | | | | | | | | |



| Step | Action | | | | | | |
|----------------------------------|--|--|--|--|--|--|--|
| The Payroll tab displays. | | | | | | | |
| | Work Location Job Information Job Labor Payroll Salary Plan Compensation | | | | | | |
| | Empl ID | | | | | | |
| | Emplayee Empl Record 1 | | | | | | |
| | Payroll Information () | | | | | | |
| | Effective Date 01/16/2025 Go To Row | | | | | | |
| | Effective Sequence 0 Action Hire HR Status Active Reason Hir ORP Ret | | | | | | |
| | Payroll Status Active Job Indicator Primary Job | | | | | | |
| | *Payroll System Payroll for North America | | | | | | |
| | Absence System Other | | | | | | |
| | Payroll for North America 🕐 | | | | | | |
| | Pay Group Q | | | | | | |
| | Employee Type Q Holiday Schedule Q | | | | | | |
| | Tax Location Code | | | | | | |
| | GL Pay Type Subject V FICA Status Edit ChartFields | | | | | | |
| | Combination Code | | | | | | |
| A | The Payroll System field defaults to "Payroll for North America". Do not change. | | | | | | |
| | The Absence System field defaults to "Other". Do not change. | | | | | | |
| 20. | Click the Pay Group Look Up icon and select "MNP". | | | | | | |
| | Note : This is the Non-Payroll pay group. | | | | | | |
| | Pay Group MNP Q Non-Payroll | | | | | | |
| | Employee Type S Q Delated | | | | | | |
| | Salaried | | | | | | |
| 21 | Click the Compensation tab. | | | | | | |
| | Work Location Job Information Job Labor Payroll Salary Plan Compensation | | | | | | |
| | | | | | | | |



| Step | Action | | | | | | | | |
|---------|--|--|--|--|--|--|--|--|--|
| The Com | ompensation tab displays. | | | | | | | | |
| | Work Location Job Labor Payroll Salary Plan Compensation Empl ID | | | | | | | | |
| | Employee Empl Record 1 | | | | | | | | |
| | Compensation Details () | | | | | | | | |
| | Effective Date 01/16/2025 Go To Row Effective Sequence 0 Action Hire HR Status Active Reason Hir ORP Ret Payroll Status Active Job Indicator Primary Job | | | | | | | | |
| | ► Comparative Information ⑦ | | | | | | | | |
| | Pay Rates ⑦ Default Pay Components | | | | | | | | |
| | Pay Components ⑦ | | | | | | | | |
| | *Rate Code Seq Comp Rate Currency Frequency Percent 1 Q 0 Image: Comp Rate Q Image: Comp Rate | | | | | | | | |
| | Calculate Compensation | | | | | | | | |
| 22. | Click the Frequency Look Up icon and change the selection from "A" to "M". | | | | | | | | |
| | *Frequency M Q Monthly | | | | | | | | |
| 23 | Click the Defaults Pay Components button. | | | | | | | | |
| | Default Pay Components | | | | | | | | |
| 24 | Click the Calculate Compensation button. | | | | | | | | |
| | Note: No additional Pay Components fields should be entered. | | | | | | | | |
| | Calculate Compensation | | | | | | | | |
| 25. | Click the Benefits Program Participation link. | | | | | | | | |
| | Job Data Employment Data Earnings Distribution Benefits Program Participation | | | | | | | | |



| Step | Action | |
|--|---|--|
| The Benefit Program Participation page displays. | | |
| | Benefit Program Participation | |
| | Employee Empl Record 1 | |
| | Benefit Status ⑦ Q 4 4 1 of 1 v b b | |
| | Benefit Record Number 1 Go To Row Effective Date 01/16/2025 Effective Sequence 0 Action Hire HR Status Active Reason Hir ORP Ret Payroll Status Active Job Indicator Primary Job | |
| | *Benefits System Benefits Administration Benefits Employee Status Active Annual Benefits Base Rate USD ACA Eligibility Details | |
| | Benefits Administration Eligibility ⑦ BAS Group ID Q Elig Fld 1 Elig Fld 2 Q Elig Fld 1 Elig Fld 2 Q Elig Fld 4 Elig Fld 5 Elig Fld 6 Elig Fld 7 Elig Fld 8 Q Elig Fld 9 Q | |
| | Benefit Program Participation Details ⑦ Q I | |
| 26. | Use the Configuration Workbook to complete the Benefits Administration Eligibility Fields 2, 3, 8 & 9 based on the appropriate scenarios for the ORP Retiree. Benefits Administration Eligibility ⑦ Bas Group ID Q Elig Fld 1 Elig Fld 2 Elig Fld 1 Elig Fld 5 Elig Fld 4 Elig Fld 5 Elig Fld 7 Elig Fld 8 | |
| 27. | Click the OK button. | |
| 28 | Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report | |



Human Resources Job Aid

| Step | Action |
|------|---|
| 29 | 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 . |