

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

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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Termination – Involuntary (except Layoff)	13
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Retirement – ORP Retiree	31



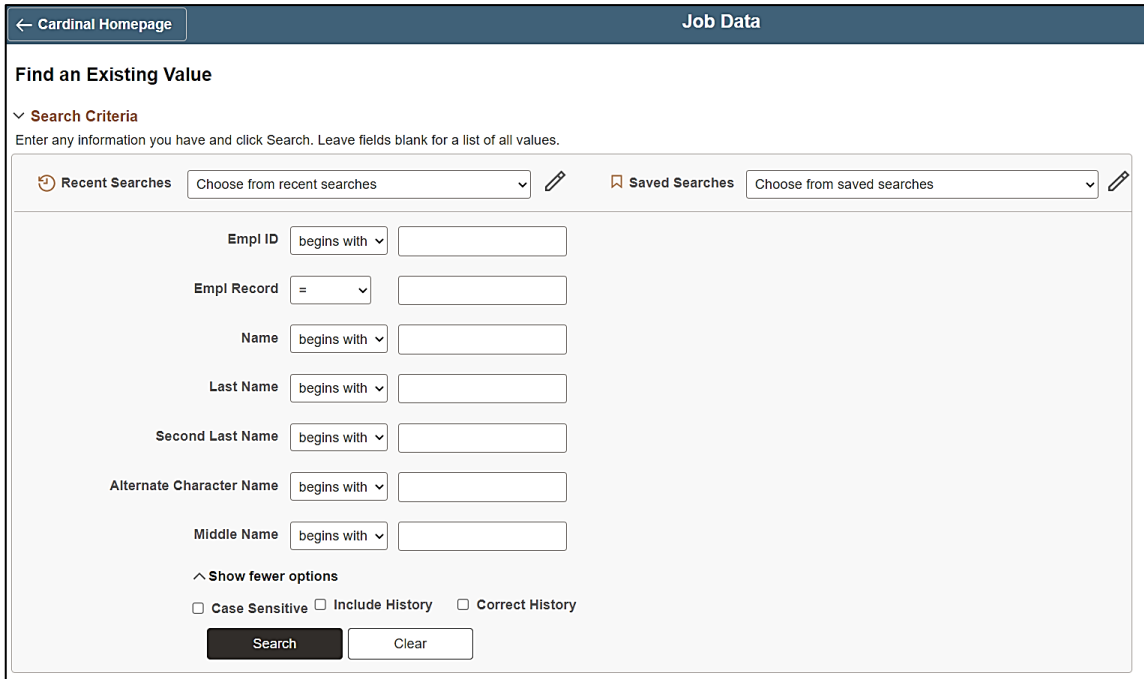
Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1; Section 2 ; after Step 1; Section 3 , after Step 1; Section 4 , after Step 1; Section 5 , 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.




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

2. 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.



3. Click the **Include History** checkbox option.

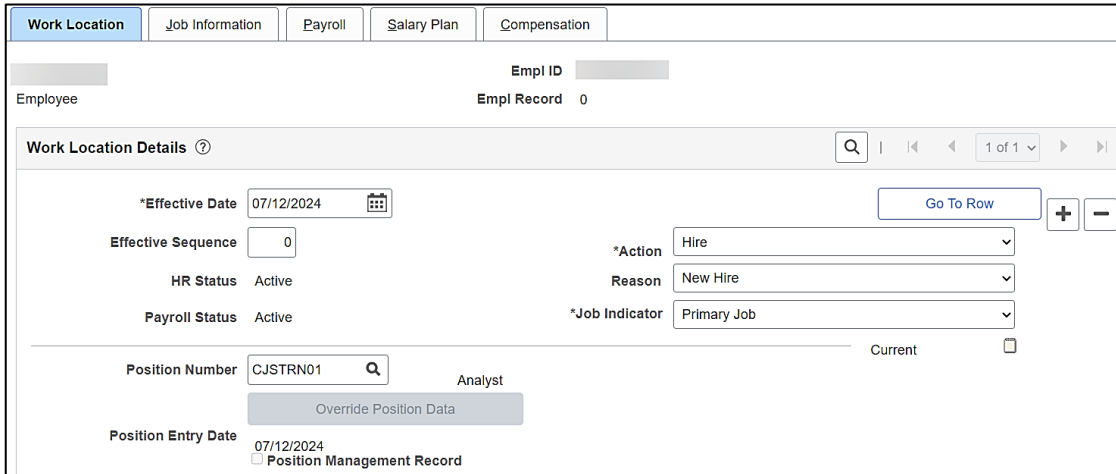


Step	Action
4.	Click the Search button.



A screenshot showing two buttons: a black button with white text labeled "Search" and a white button with black text labeled "Clear". The "Search" button is highlighted with a red border.

The **Job Data** page for the employee displays (**Work Location** tab).



A screenshot of the "Work Location" tab in a software application. The page shows various fields for an employee's work location details. At the top, there are tabs for "Work Location", "Job Information", "Payroll", "Salary Plan", and "Compensation". Below the tabs, the "Work Location" tab is active, displaying fields for "Effective Date" (07/12/2024), "Effective Sequence" (0), "HR Status" (Active), "Payroll Status" (Active), "Position Number" (CJSTRN01), and "Position Entry Date" (07/12/2024). There are also dropdown menus for "*Action" (Hire), "Reason" (New Hire), and "*Job Indicator" (Primary Job). A "Go To Row" button and navigation icons are visible. A red box highlights the "+" icon in the navigation area.

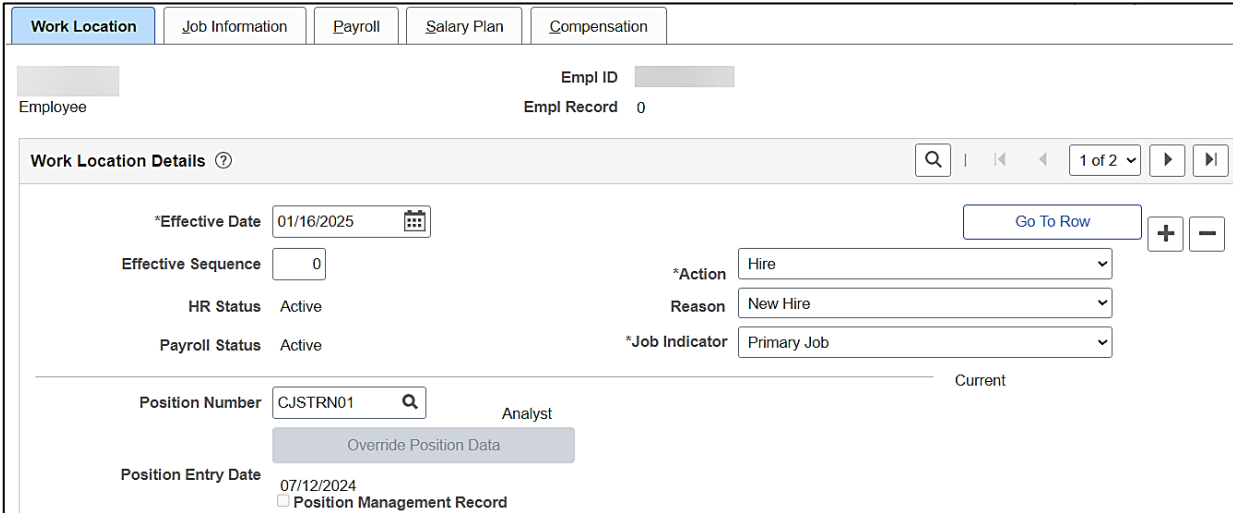
5.	Click the Add a New Row icon (+) to add a new effective dated row.
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A screenshot showing a close-up of the "Go To Row" button and navigation icons. The "+" icon is highlighted with a red box, indicating it is the button to click to add a new row.

Step	Action
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The **Job Data** page refreshes with the new effective dated row displayed.



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

Empl ID [redacted]
Employee [redacted] Empl Record 0

Work Location Details ? [Search] | 1 of 2 | [Go To Row] [+ -]

*Effective Date 01/16/2025 [Calendar] [Go To Row] [+ -]
Effective Sequence 0 *Action Hire
HR Status Active Reason New Hire
Payroll Status Active *Job Indicator Primary Job

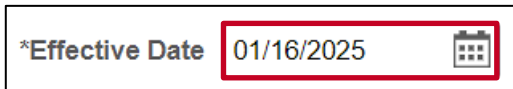
Position Number CJSTRN01 [Search] Analyst Current
[Override Position Data]
Position Entry Date 07/12/2024
 Position Management Record



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 [Calendar]

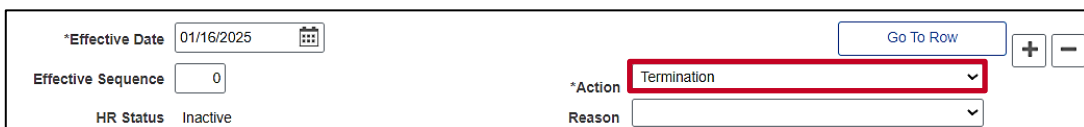


Set the effective date to be one day after the employee's last day worked. The effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee's last day on the payroll).

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.

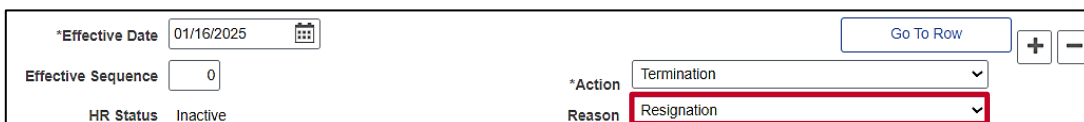
Click the **Action** field dropdown button and select "Termination".




*Effective Date 01/16/2025 [Calendar] [Go To Row] [+ -]
Effective Sequence 0 *Action Termination
HR Status Inactive Reason [dropdown]

8.

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

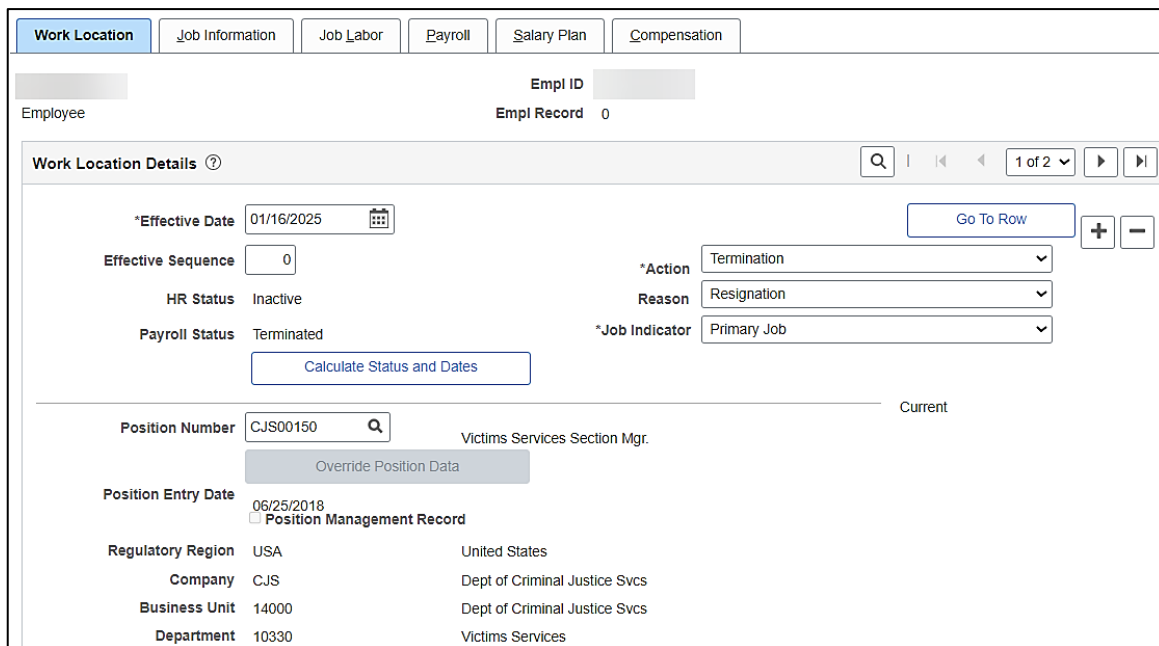


*Effective Date 01/16/2025 [Calendar] [Go To Row] [+ -]
Effective Sequence 0 *Action Termination
HR Status Inactive Reason Resignation

Step	Action
	<p>There are two Action Reason combinations related to an employee's death. One is Termination/Death, and the other is Termination/Death with Dependent. The difference between the two events is that the benefits terminate on different dates. When an employee passes away, the Benefit Administrator should review the employee's current health plan coverage code and advise the HR Administrator whether to use the Termination/Death or Termination/Death with Dependent Action/Reason combination.</p> <p>For further information on Action Reasons, see the Job Aid titled HR351_Action Reason Codes. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>

The **Job Data** page refreshes.

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



9.	<p>Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Terminated”.</p> <div data-bbox="292 1533 641 1648" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Terminated</p> </div>
10.	<p>Click the Save button.</p> <div data-bbox="292 1732 933 1816" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px; background-color: #007bff; color: white;">Save</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Return to Search</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Notify</div> <div style="border: 1px solid #ccc; padding: 2px 10px;">Refresh</div> </div> </div>

Step	Action
	<p>If a Termination Action Reason of “Death” or “Death with Dependent” is selected, the death date on the employee’s Personal Record is updated, and the Death Warning Message displays in a pop-up window.</p> <div data-bbox="292 445 1042 619" style="border: 2px solid red; padding: 5px;"> <p>Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)</p> <p>Date of Death on personal data gets updated for the current transaction.</p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div>
11.	<p>Click the OK button.</p> <div data-bbox="292 709 1042 884" style="border: 1px solid black; padding: 5px;"> <p>Warning -- Date of Death on personal data gets updated for the current transaction. (1000,1471)</p> <p>Date of Death on personal data gets updated for the current transaction.</p> <p style="text-align: center;"> <input style="border: 2px solid red;" type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div>

The **Job Data** page redispays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee
Empl ID [redacted]

Empl Record 0

Work Location Details 1 of 2

*Effective Date

Effective Sequence

HR Status Inactive

Payroll Status Terminated

*Action Termination

Reason Resignation

*Job Indicator Primary Job

Go To Row

Current

Position Number

Position Entry Date

Regulatory Region USA

Company CJS

Business Unit 14000

Department 10330

Department Entry Date 05/14/2012

Location CENT1

Establishment ID

Victims Services Section Mgr.

Position Management Record

United States

Dept of Criminal Justice Svcs

Dept of Criminal Justice Svcs

Victims Services

Washington Building

Dept of Criminal Justice Serv.

Date Created 01/31/2025

Last Start Date 05/14/2012

Last Date Worked 01/15/2025

Termination Date 01/15/2025

Override Last Date Worked


STD Claim Number

Layoff Notice Date

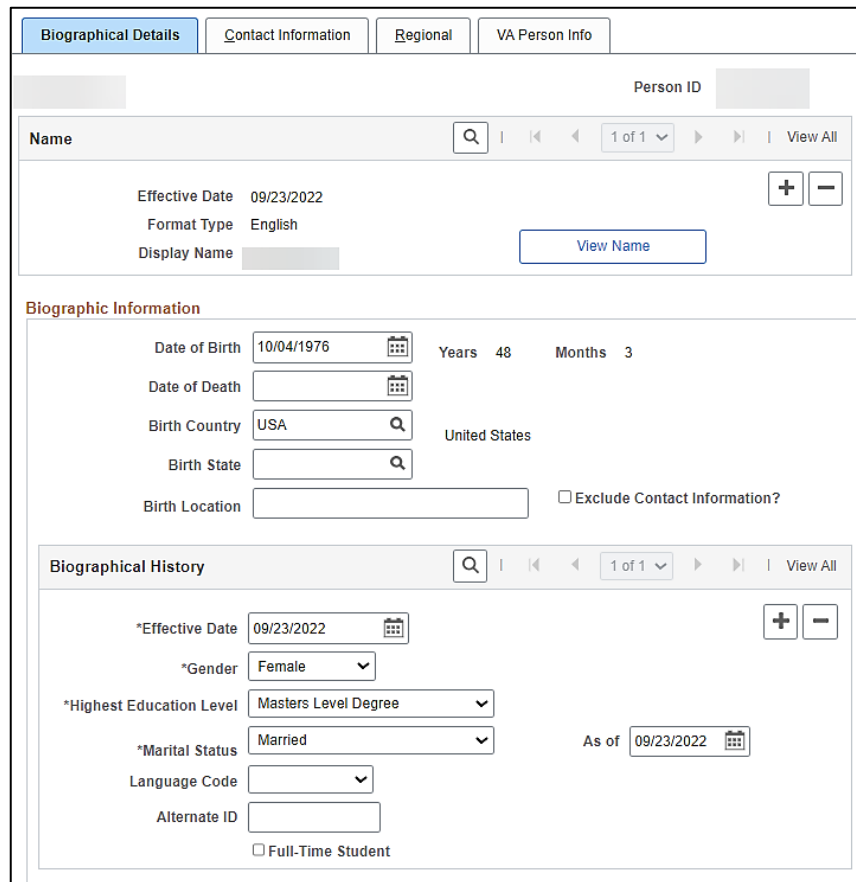
Recall Eligibility Flag

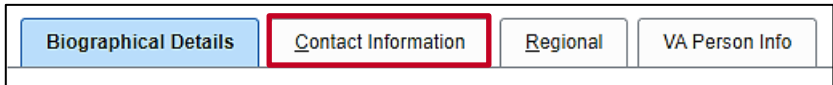
Turn Off Auto Pay

Yes No

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



13.	Click the Contact Information tab. 
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Step	Action
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The **Contact Information** page displays.

Biographical Details
Contact Information
Regional
VA Person Info

Empl ID

Current Addresses

📄 🔍
1-1 of 1
View All

Address Type	As Of Date	Status	Address		
Home	03/24/2022	A	100 MAIN ST RICHMOND, VA 99999 Prince George	View Address Detail	+ -

Phone Information

📄 🔍
1-3 of 3
View All

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

Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

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

Email Addresses

*Email Type	*Email Address	Preferred		
Business	<input style="width: 100%;" type="text"/>	<input checked="" type="checkbox"/>	+	-

14. Under the **Email Option Selection** section, click the **Employee Provided Email** radio button option.

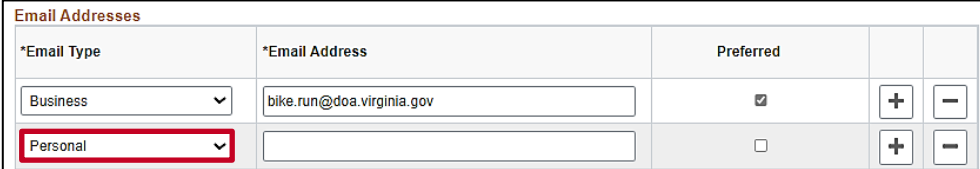
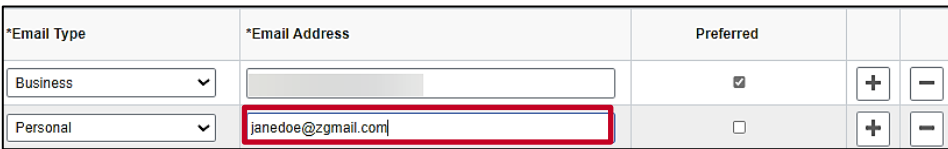
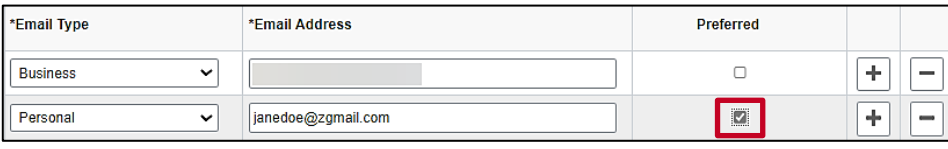
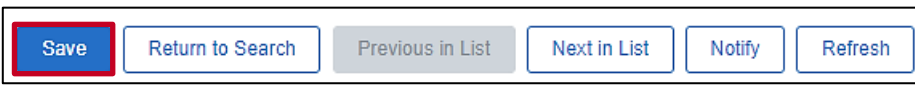
Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

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

Email Addresses

*Email Type	*Email Address	Preferred		
Business	<input style="width: 100%;" type="text"/>	<input checked="" type="checkbox"/>	+	-

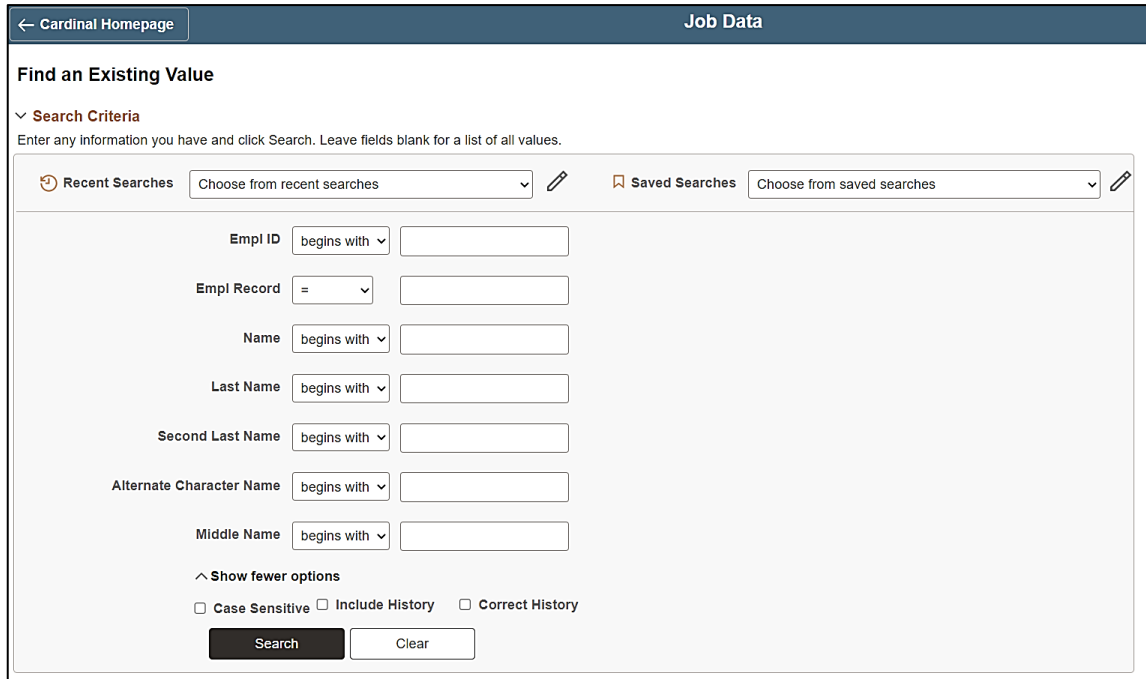
Step	Action															
16.	Click the Email Type dropdown button and select “Personal”.  <table border="1" data-bbox="292 378 1266 546"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>bike.run@doa.virginia.gov</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business	bike.run@doa.virginia.gov	<input checked="" type="checkbox"/>	+	-	Personal		<input type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business	bike.run@doa.virginia.gov	<input checked="" type="checkbox"/>	+	-												
Personal		<input type="checkbox"/>	+	-												
17.	Enter the personal email address in the Email Address field.  <table border="1" data-bbox="292 630 1234 777"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@gmail.com</td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input checked="" type="checkbox"/>	+	-	Personal	janedoe@gmail.com	<input type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input checked="" type="checkbox"/>	+	-												
Personal	janedoe@gmail.com	<input type="checkbox"/>	+	-												
18.	Check the Preferred checkbox option.  <table border="1" data-bbox="292 861 1234 1008"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@gmail.com</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input type="checkbox"/>	+	-	Personal	janedoe@gmail.com	<input checked="" type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input type="checkbox"/>	+	-												
Personal	janedoe@gmail.com	<input checked="" type="checkbox"/>	+	-												
19.	Click the Save button.  <table border="1" data-bbox="292 1081 1201 1165"> <tr> <td>Save</td> <td>Return to Search</td> <td>Previous in List</td> <td>Next in List</td> <td>Notify</td> <td>Refresh</td> </tr> </table>	Save	Return to Search	Previous in List	Next in List	Notify	Refresh									
Save	Return to Search	Previous in List	Next in List	Notify	Refresh											

Step	Action																																														
	<p>The Contact Information tab refreshes.</p> <div data-bbox="347 378 1289 1243" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 5px;"> Biographical Details Contact Information Regional VA Person Info </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Empl ID Empl ID </div> <p>Current Addresses</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> 1-1 of 1 View All </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Address Type</th> <th>As Of Date</th> <th>Status</th> <th>Address</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Home</td> <td>03/24/2022</td> <td>A</td> <td>100 MAIN ST RICHMOND, VA 99999 Prince George</td> <td>View Address Detail</td> <td style="text-align: center;">+ -</td> </tr> </tbody> </table> <p>Phone Information</p> <div style="display: flex; justify-content: space-between; align-items: center; margin-bottom: 5px;"> 1-3 of 3 View All </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>555/555-5555</td> <td></td> <td><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> <tr> <td>Mobile</td> <td>555/555-5555</td> <td></td> <td><input type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> <tr> <td>Home</td> <td>555/555-5555</td> <td></td> <td><input type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> <p>Email Option Selection</p> <div style="display: flex; justify-content: space-around; margin-bottom: 5px;"> <input type="radio"/> Agency Provided Email <input type="radio"/> Pending Agency Provided Email <input checked="" type="radio"/> Employee Provided Email </div> <p style="font-size: small; margin-bottom: 5px;"> 1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except: 2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov </p> <p>Email Addresses</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> </div>	Address Type	As Of Date	Status	Address			Home	03/24/2022	A	100 MAIN ST RICHMOND, VA 99999 Prince George	View Address Detail	+ -	*Phone Type	Telephone	Extension	Preferred			Business	555/555-5555		<input checked="" type="checkbox"/>	+	-	Mobile	555/555-5555		<input type="checkbox"/>	+	-	Home	555/555-5555		<input type="checkbox"/>	+	-	*Email Type	*Email Address	Preferred			Personal	janedoe@zgmail.com	<input checked="" type="checkbox"/>	+	-
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Mobile	555/555-5555		<input type="checkbox"/>	+	-																																										
Home	555/555-5555		<input type="checkbox"/>	+	-																																										
*Email Type	*Email Address	Preferred																																													
Personal	janedoe@zgmail.com	<input checked="" type="checkbox"/>	+	-																																											
20.	<p>Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report</p>																																														
21.	<p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p>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.</p>																																														

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

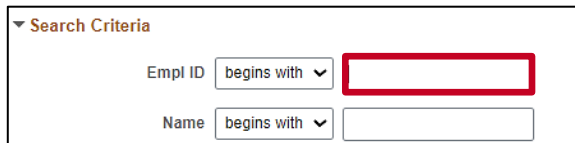
The **Job Data Find an Existing Value** page displays.




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

2.

Enter the Employee’s ID in the **Empl ID** field.




Users can also search by name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

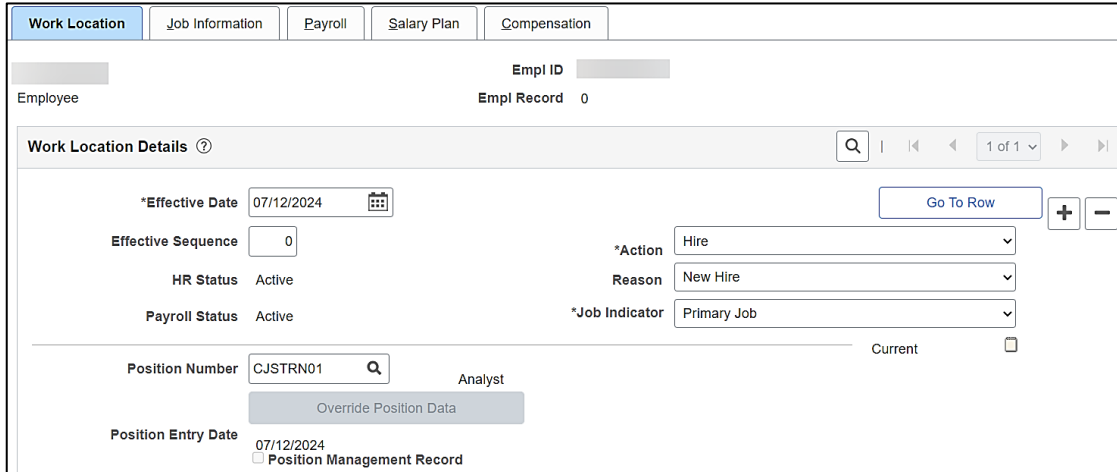
3.

Click the **Search** button.



Step	Action
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The **Job Data** page for the employee displays (**Work Location** tab).



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

Employee [Redacted] Empl ID [Redacted]
Empl Record 0

Work Location Details ? |

*Effective Date

Effective Sequence

HR Status Active

Payroll Status Active

*Action Hire

Reason New Hire

*Job Indicator Primary Job

Position Number Analyst

Position Entry Date Position Management Record

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

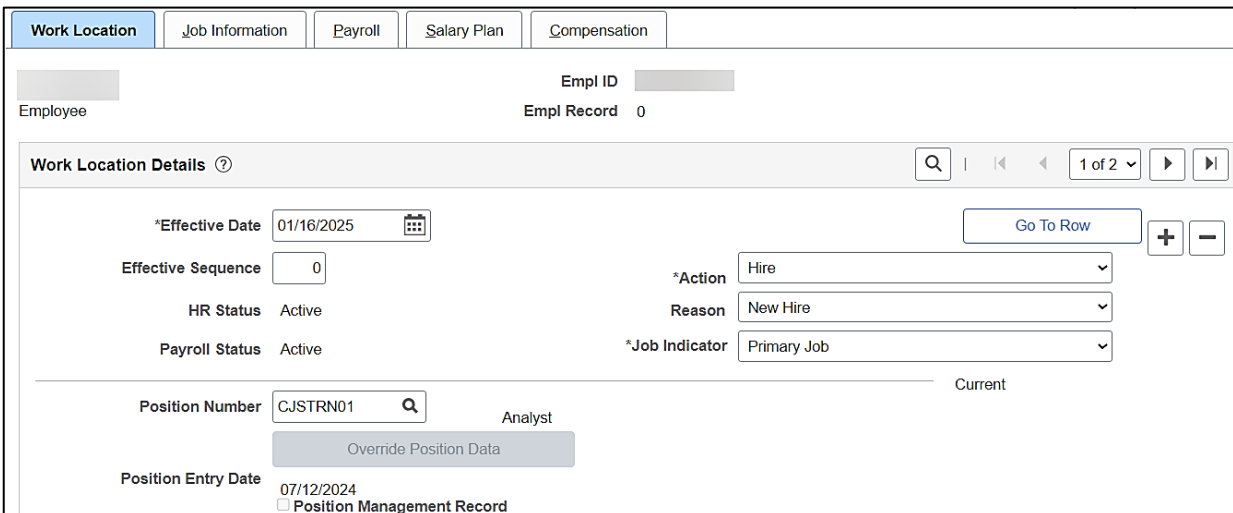


*Action Hire

Reason New Hire

*Job Indicator Primary Job

The **Job Data** page refreshes with the new effective dated row displayed.



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

Employee [Redacted] Empl ID [Redacted]
Empl Record 0

Work Location Details ? |

*Effective Date

Effective Sequence

HR Status Active

Payroll Status Active

*Action Hire

Reason New Hire



*Job Indicator Primary Job

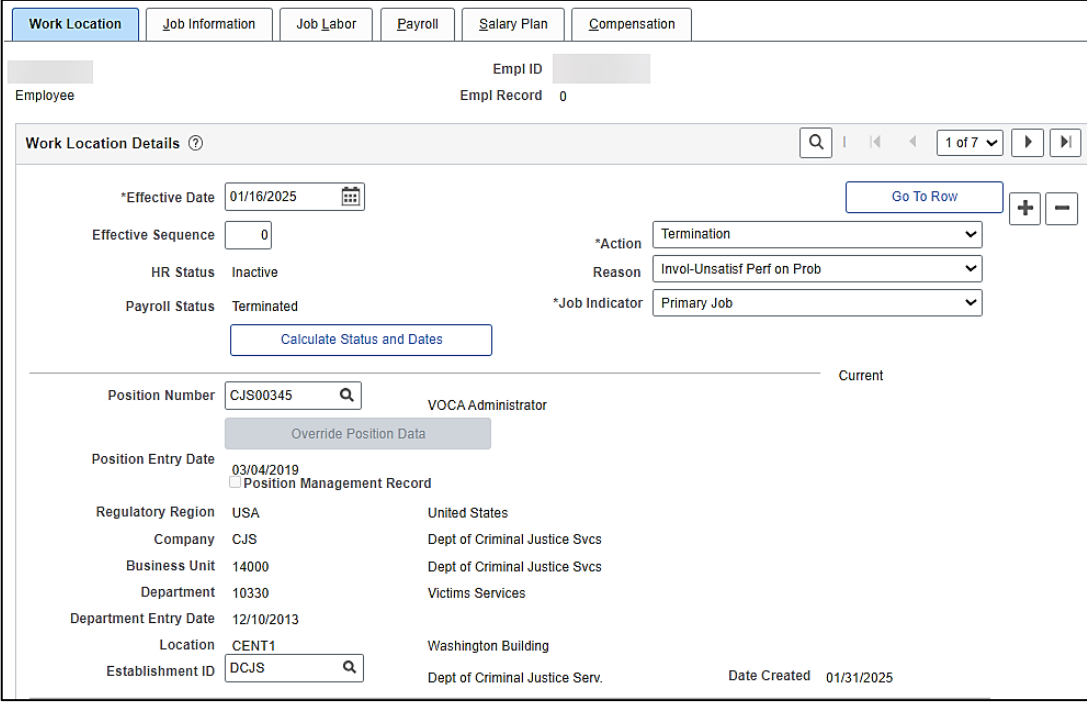
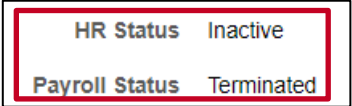
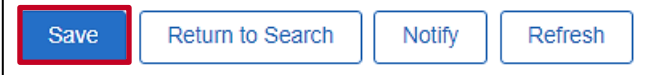

Position Number Analyst

Position Entry Date Position Management Record



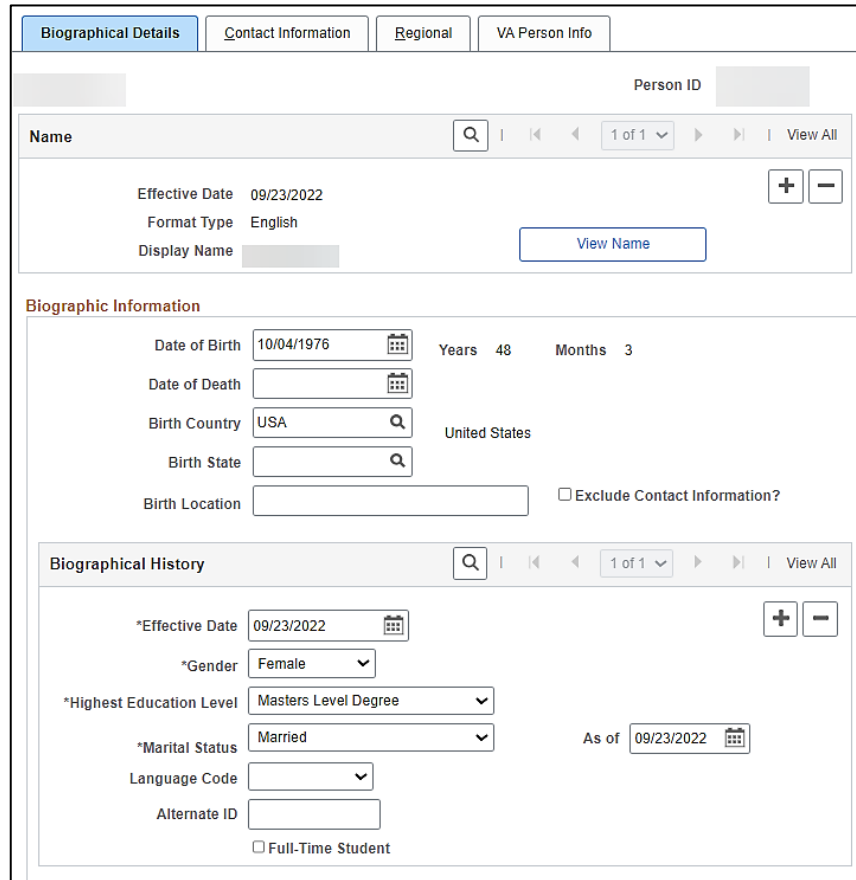
When a new row is created, the row count increases by one and the **Effective Date** field displays the current date.

Step	Action
5.	Update the effective date as needed using the Effective Date Calendar icon. <div data-bbox="293 380 805 464" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> *Effective Date <input style="border: 1px solid red;" type="text" value="01/16/2025"/> </div>
	<p>Set the effective date to be one day after the employee’s last day worked. Effective date of Termination transactions is generally the day immediately following last day worked (or the day after the employee’s last day on the payroll).</p> <p>If an employee’s last day is “1/15/2025”, the effective date of the termination should be “1/16/2025”. For further information on effective dating, see the Job Aid titled HR351_Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
6.	Click the Action field dropdown button and select “Termination”. <div data-bbox="293 835 1373 955" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div> *Effective Date <input type="text" value="01/16/2025"/> </div> <div> <input type="button" value="Go To Row"/> <input type="button" value="+"/> <input type="button" value="-"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Effective Sequence <input type="text" value="0"/> </div> <div> *Action <input style="border: 1px solid red;" type="text" value="Termination"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> HR Status Inactive </div> <div> Reason <input type="text"/> </div> </div> </div>
7.	Click the Reason field dropdown button and select the applicable reason. <div data-bbox="293 1045 1373 1161" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-between;"> <div> *Effective Date <input type="text" value="01/16/2025"/> </div> <div> <input type="button" value="Go To Row"/> <input type="button" value="+"/> <input type="button" value="-"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> Effective Sequence <input type="text" value="0"/> </div> <div> *Action <input type="text" value="Termination"/> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div> HR Status Inactive </div> <div> Reason <input style="border: 1px solid red;" type="text" value="Invol-Unsatisf Perf on Prob"/> </div> </div> </div>
	<p>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.</p>

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

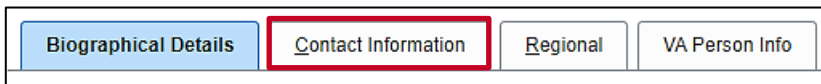
Step	Action
------	--------

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



11.

Click the **Contact Information** tab.



Step	Action
------	--------

The **Contact Information** tab displays.

Biographical Details
Contact Information
Regional
VA Person Info

Empl ID

Current Addresses

📄 🔍
1-1 of 1
View All

Address Type	As Of Date	Status	Address		
Home	03/24/2022	A	100 MAIN ST RICHMOND, VA 99999 Prince George	View Address Detail	+ -

Phone Information

📄 🔍
1-3 of 3
View All

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

Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

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

Email Addresses

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

12. Under the **Email Option Selection** section, click the **Employee Provided Email** radio button option.

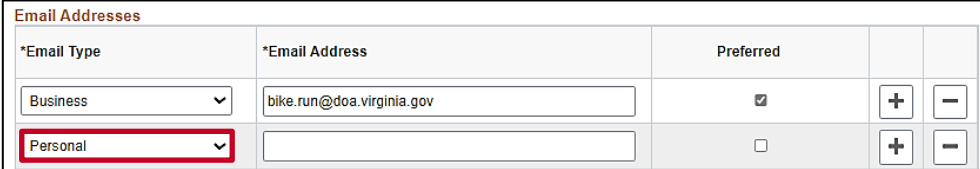
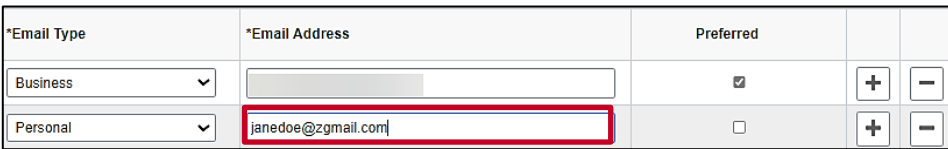
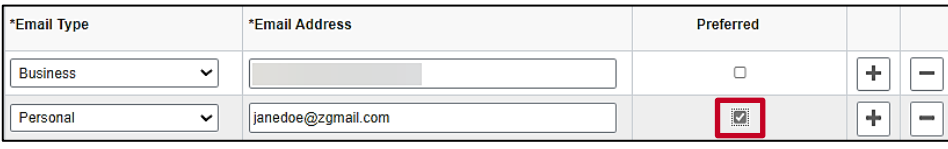
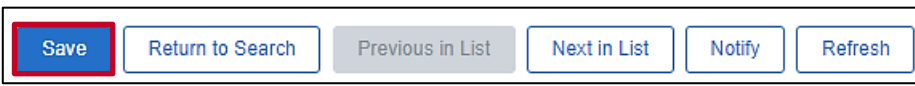
Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

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

Email Addresses

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

Step	Action															
14.	<p>Click the Email Type field dropdown button and select “Personal”.</p>  <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>bike.run@doa.virginia.gov</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business	bike.run@doa.virginia.gov	<input checked="" type="checkbox"/>	+	-	Personal		<input type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business	bike.run@doa.virginia.gov	<input checked="" type="checkbox"/>	+	-												
Personal		<input type="checkbox"/>	+	-												
15.	<p>Enter the personal email address in the Email Address field.</p>  <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@gmail.com</td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input checked="" type="checkbox"/>	+	-	Personal	janedoe@gmail.com	<input type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input checked="" type="checkbox"/>	+	-												
Personal	janedoe@gmail.com	<input type="checkbox"/>	+	-												
16.	<p>Check the Preferred checkbox option.</p>  <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@gmail.com</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input type="checkbox"/>	+	-	Personal	janedoe@gmail.com	<input checked="" type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input type="checkbox"/>	+	-												
Personal	janedoe@gmail.com	<input checked="" type="checkbox"/>	+	-												
17.	<p>Click the Save button.</p> 															
18.	<p>Run the Employee Activity Report for the employee using the following navigation path: NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report</p>															
19.	<p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p>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.</p>															

Long Term Disability Not Working

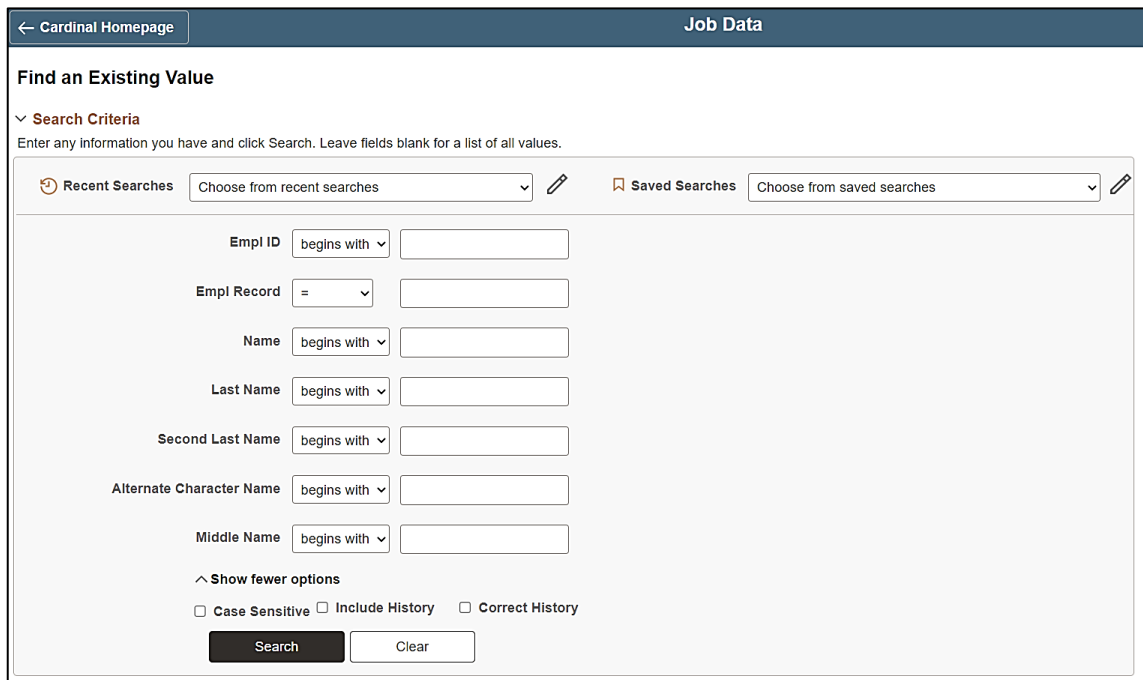
If there is a lag between STD workday 125 and the LTD claim approval, the agency is asked to place the employee in Unpaid Leave of Absence (LOA), Personal (PER), and change benefits eligibility to COVA 100% EE Paid Grp Bill until the LTD claim is approved.

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




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

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

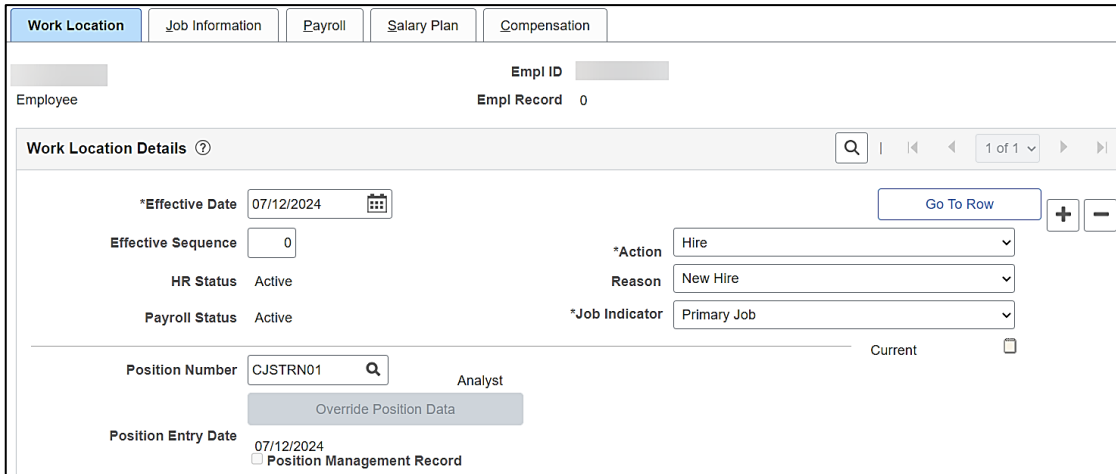
The **Job Data Find an Existing Value** page displays.





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

Step	Action
2.	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. 
3.	Click the Include History checkbox option. 
4.	Click the Search button. 

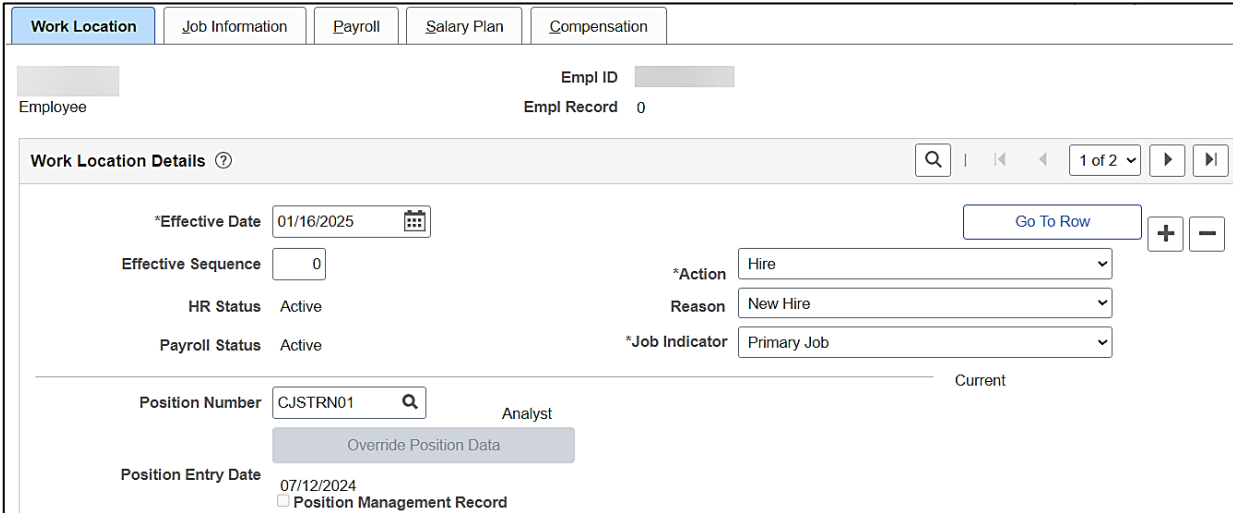
The **Job Data** page for the employee displays (**Work Location** tab).











5.	Click the Add a New Row icon (+) to add a new effective dated row. 
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Step	Action
------	--------

The **Job Data** page refreshes with the new effective dated row displayed.

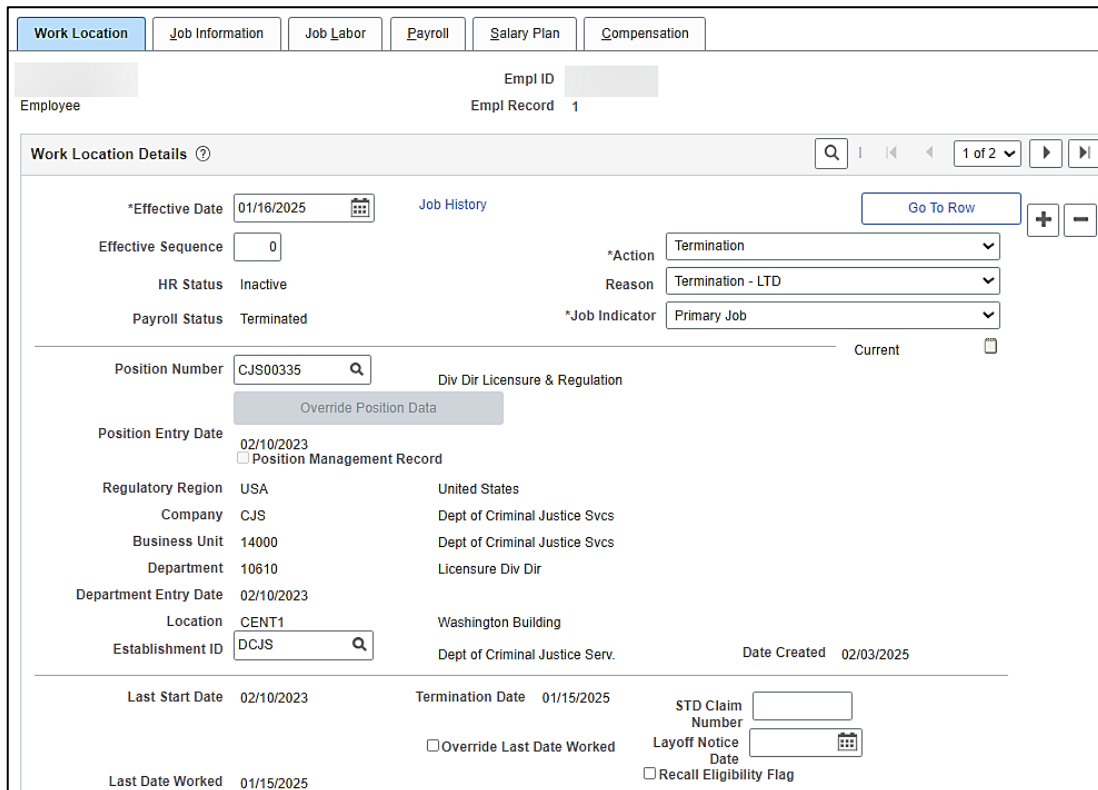


	When a new row is created, the row count increases by one and the Effective Date field displays the current date.
6.	Update the effective date as needed using the Effective Date Calendar icon. <div style="border: 1px solid black; padding: 5px; display: inline-block;"> *Effective Date 01/16/2025  </div>
	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". <div style="border: 1px solid black; padding: 5px; display: inline-block;"> *Action Termination  Reason  </div>
8.	Click the Reason dropdown button and select "Termination - LTD". <div style="border: 1px solid black; padding: 5px; display: inline-block;"> *Action Termination  Reason Termination - LTD  </div>

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.



The screenshot shows the 'Work Location Details' section of a web application. It features a search bar at the top right and a 'Go To Row' button. The main area contains several fields:

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

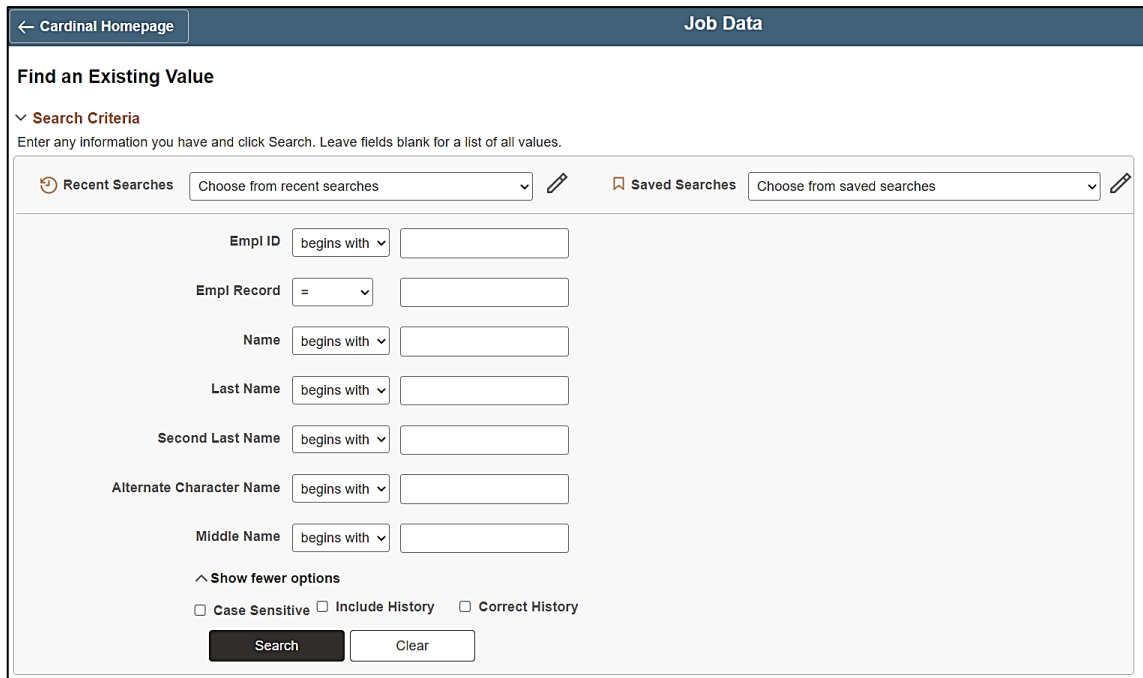
9.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Terminated”. <div data-bbox="292 1480 641 1585" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Terminated</p> </div>
----	--

10.	Click the Save button. <div data-bbox="292 1669 933 1753" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px;">Save</div> <div style="border: 1px solid black; padding: 2px 10px;">Return to Search</div> <div style="border: 1px solid black; padding: 2px 10px;">Notify</div> <div style="border: 1px solid black; padding: 2px 10px;">Refresh</div> </div> </div>
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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.




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

2. 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.



3. Click the **Include History** checkbox option.



Step	Action
4.	Click the Search button. <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 2px solid red; padding: 5px 15px; background-color: black; color: white; font-weight: bold;">Search</div> <div style="border: 1px solid black; padding: 5px 15px;">Clear</div> </div> </div>

The **Job Data** page for the employee displays (**Work Location** tab).

Work Location

Job Information

Payroll

Salary Plan

Compensation

Employee
Empl ID [REDACTED]

Empl Record 0

Work Location Details ⓘ
1 of 1

*Effective Date 📅

Effective Sequence

HR Status Active

Payroll Status Active

Position Number 🔍 Analyst

Position Entry Date 📅

Position Management Record

Go To Row + -

*Action

Reason








*Job Indicator


Current

5.	Click the Add a New Row icon (+) to add a new effective dated row. <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="width: 60%;"> <p>*Action <input type="text" value="Hire"/></p> <p>Reason <input type="text" value="New Hire"/></p> <p>*Job Indicator <input type="text" value="Primary Job"/></p> </div> <div style="width: 35%;"> <p style="text-align: right;">Go To Row + -</p> </div> </div> </div>
----	---

Step	Action
------	--------

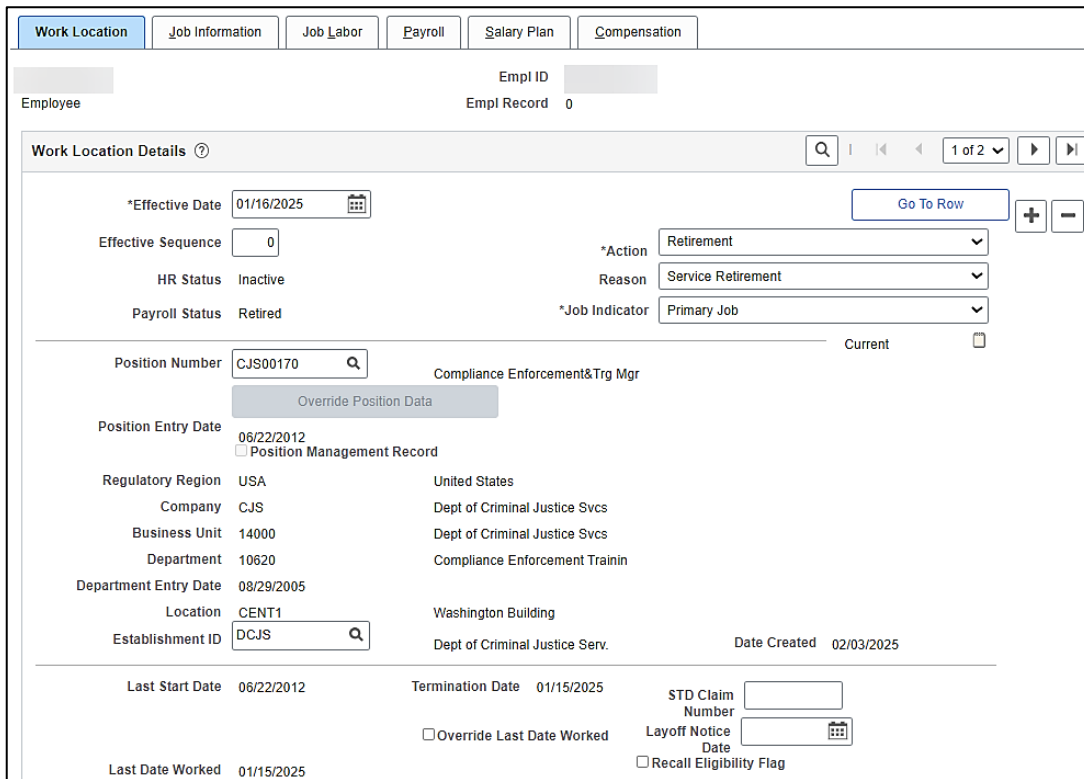
The **Job Data** page refreshes with the new effective dated row.

	When a new row is created, the row count increases by one and the Effective Date field displays the current date.
6.	Update the effective date as needed using the Effective Date Calendar icon. <div style="border: 1px solid black; padding: 5px; display: inline-block;"> *Effective Date 01/16/2025  </div>
	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". <div style="border: 1px solid black; padding: 5px; display: inline-block;"> *Action Retirement  Reason  </div>
8.	Click the Reason dropdown button and select the applicable reason. <div style="border: 1px solid black; padding: 5px; display: inline-block;"> *Action Retirement  Reason Service Retirement  </div>

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.

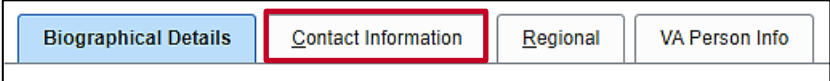
Note: After selecting the **Action** and **Action Reason**, the **HR Status** and **Payroll Status** fields automatically update.

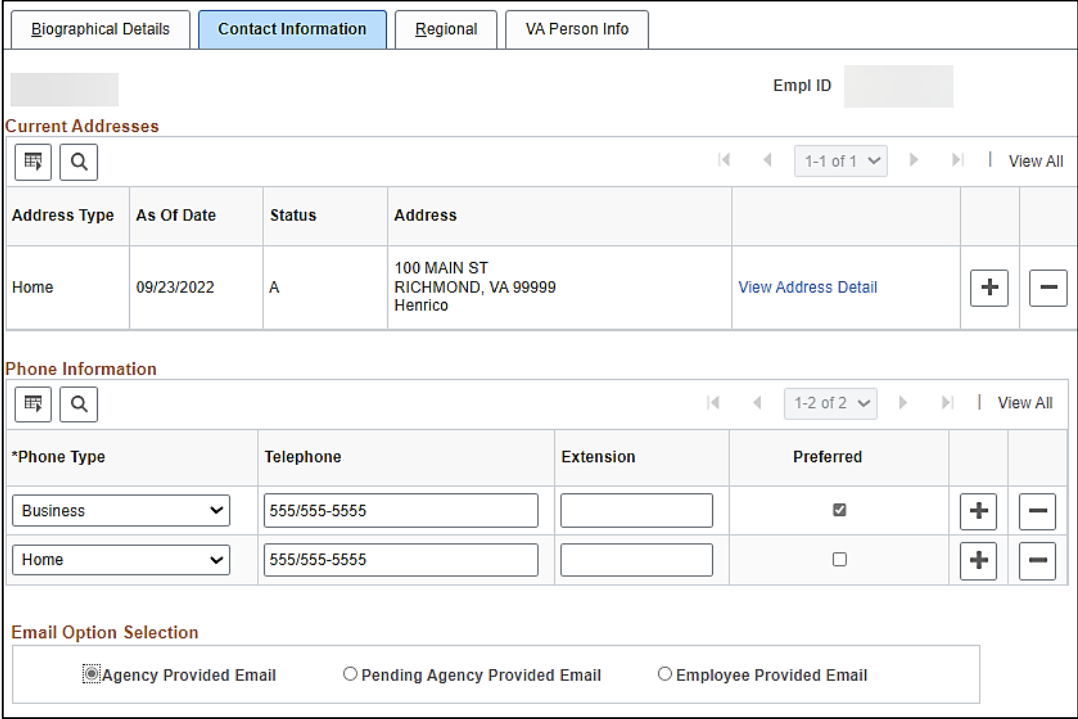
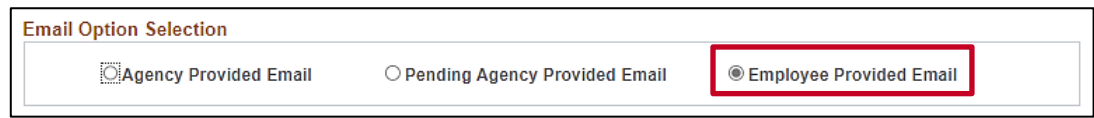
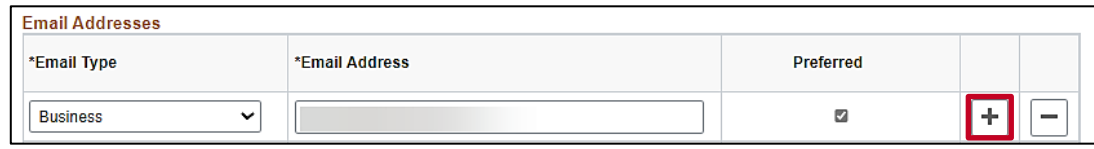
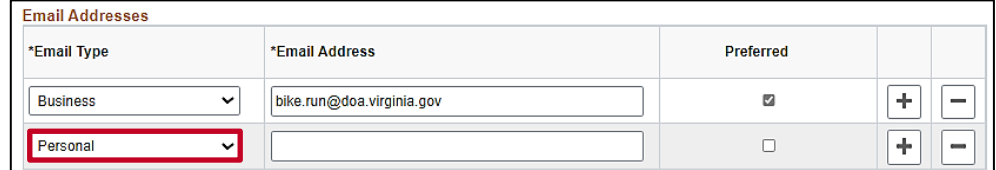


9.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Retired”. <div data-bbox="292 1459 584 1575" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Retired</p> </div>
----	--

10.	Click the Save button. <div data-bbox="292 1659 933 1743" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p> <input style="border: 2px solid red;" type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> </p> </div>
-----	--

	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.
---	---

Step	Action
11.	Navigate to the Modify a Person page using the following navigation: NavBar > Menu > Workforce Administration > Personal Information > Modify a Person
<p>The Modify a Person page for the employee displays (Biographical Details tab).</p>	
12.	Click the Contact Information tab. 

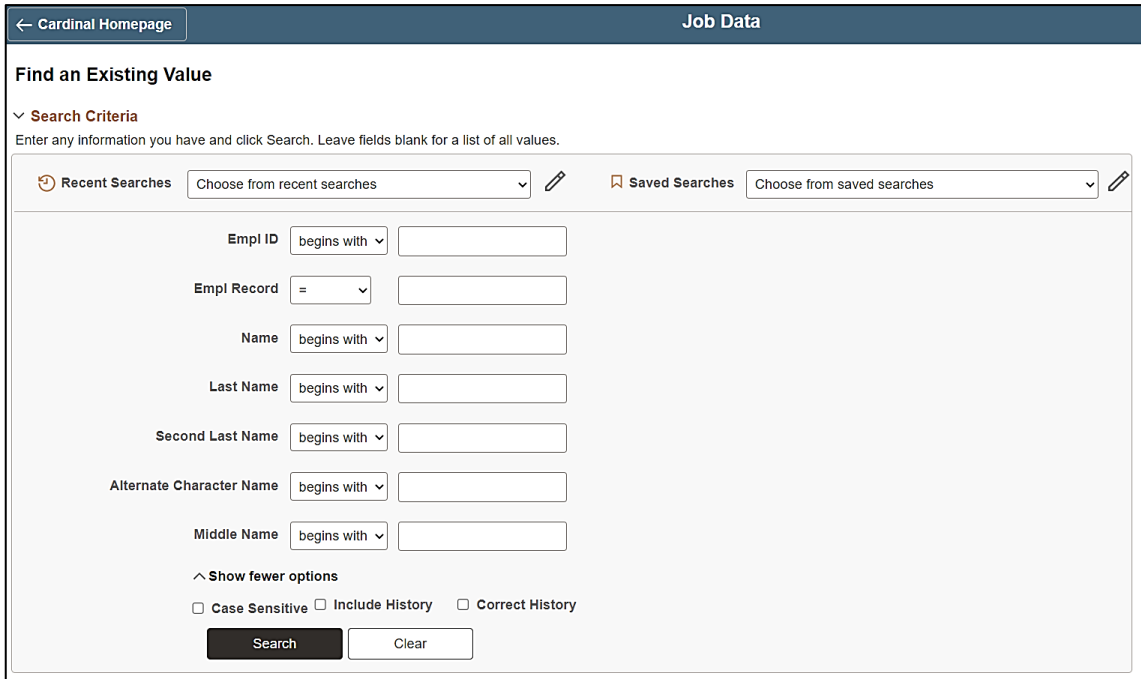
Step	Action
	<p>The Contact Information tab displays.</p> 
13.	<p>Under the Email Option Selection section, click the Employee Provided Email radio button option.</p> 
14.	<p>Click the Add a New Row icon (+) to add a new email address.</p> 
15.	<p>Click the Email Type field dropdown button and select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




Step	Action															
16.	<p>Enter the personal email address in the Email Address field.</p> <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input checked="" type="checkbox"/>	+	-	Personal	janedoe@zgmail.com	<input type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input checked="" type="checkbox"/>	+	-												
Personal	janedoe@zgmail.com	<input type="checkbox"/>	+	-												
17.	<p>Check the Preferred checkbox option.</p> <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> <tr> <td>Personal</td> <td>janedoe@zgmail.com</td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Email Type	*Email Address	Preferred			Business		<input type="checkbox"/>	+	-	Personal	janedoe@zgmail.com	<input checked="" type="checkbox"/>	+	-
*Email Type	*Email Address	Preferred														
Business		<input type="checkbox"/>	+	-												
Personal	janedoe@zgmail.com	<input checked="" type="checkbox"/>	+	-												
18.	<p>Click the Save button.</p> <table border="1"> <tbody> <tr> <td>Save</td> <td>Return to Search</td> <td>Previous in List</td> <td>Next in List</td> <td>Notify</td> <td>Refresh</td> </tr> </tbody> </table>	Save	Return to Search	Previous in List	Next in List	Notify	Refresh									
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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.



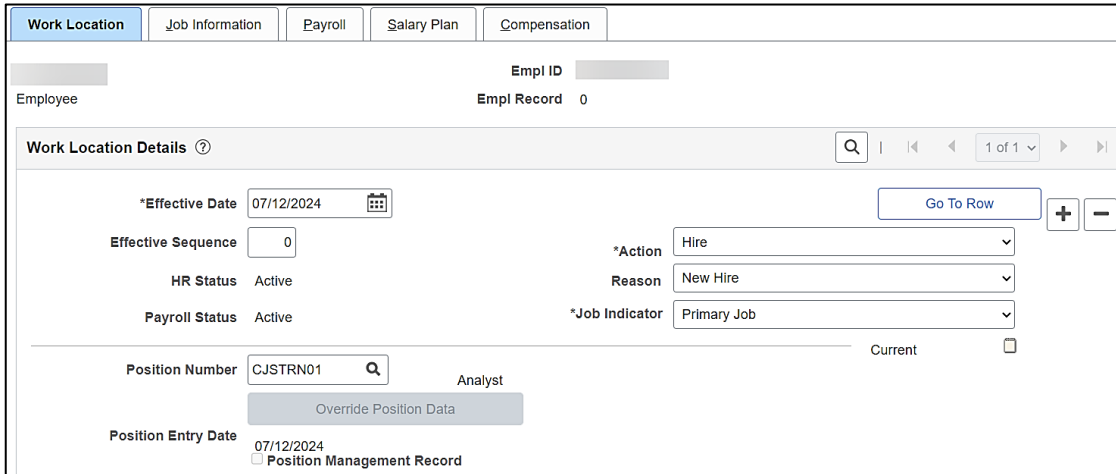
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter the employee’s Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. 
3.	Click the Include History checkbox option. 

Step	Action
4.	Click the Search button.



A screenshot showing two buttons: a black 'Search' button with a red border and a white 'Clear' button with a black border.

The **Job Data** page for the employee displays (**Work Location** tab).



A screenshot of the 'Work Location' tab in a software application. The page shows various fields for an employee's work location details, including effective date, sequence, status, and action. The 'Effective Date' is 07/12/2024. The 'Action' is 'Hire', 'Reason' is 'New Hire', and '*Job Indicator' is 'Primary Job'. There is a 'Go To Row' button and a '+' icon for adding a new row.








5.	Click the Add a New Row icon (+) to add a new effective dated row.
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A screenshot showing a close-up of the 'Go To Row' button and the '+' icon, which is highlighted with a red box. Below the button are three dropdown menus for '*Action' (Hire), 'Reason' (New Hire), and '*Job Indicator' (Primary Job).

Step	Action
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The **Job Data** page refreshes with the new effective dated row.

	When a new row is created, the row count increases by one and the Effective Date field displays the current date.
6.	Update the effective date as needed using the Effective Date Calendar icon. <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> *Effective Date 01/16/2025  </div>
	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”. <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> *Action Retirement  Reason  </div>
8.	Click the Reason dropdown button and select “Retirement – ORP”. <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> *Action Retirement  Reason Retirement-ORP  </div>

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.

The screenshot shows the 'Work Location Details' form. Key fields include:

- *Effective Date:** 01/16/2025
- Effective Sequence:** 0
- HR Status:** Inactive
- Payroll Status:** Retired
- *Action:** Retirement
- Reason:** Retirement-ORP
- *Job Indicator:** Primary Job
- Position Number:** CJS00327
- Position Entry Date:** 08/10/2018
- Regulatory Region:** USA
- Company:** CJS
- Business Unit:** 14000
- Department:** 10620
- Location:** MOBL2
- Establishment ID:** DCJS
- Termination Date:** 01/15/2025
- Last Start Date:** 08/10/2018
- Last Date Worked:** 01/15/2025

9.	Validate that the HR Status displays as “Inactive” and the Payroll Status displays as “Retired”. <div data-bbox="292 1459 584 1575" style="border: 2px solid red; padding: 5px; margin: 10px 0;"> <p>HR Status Inactive</p> <p>Payroll Status Retired</p> </div>
----	--

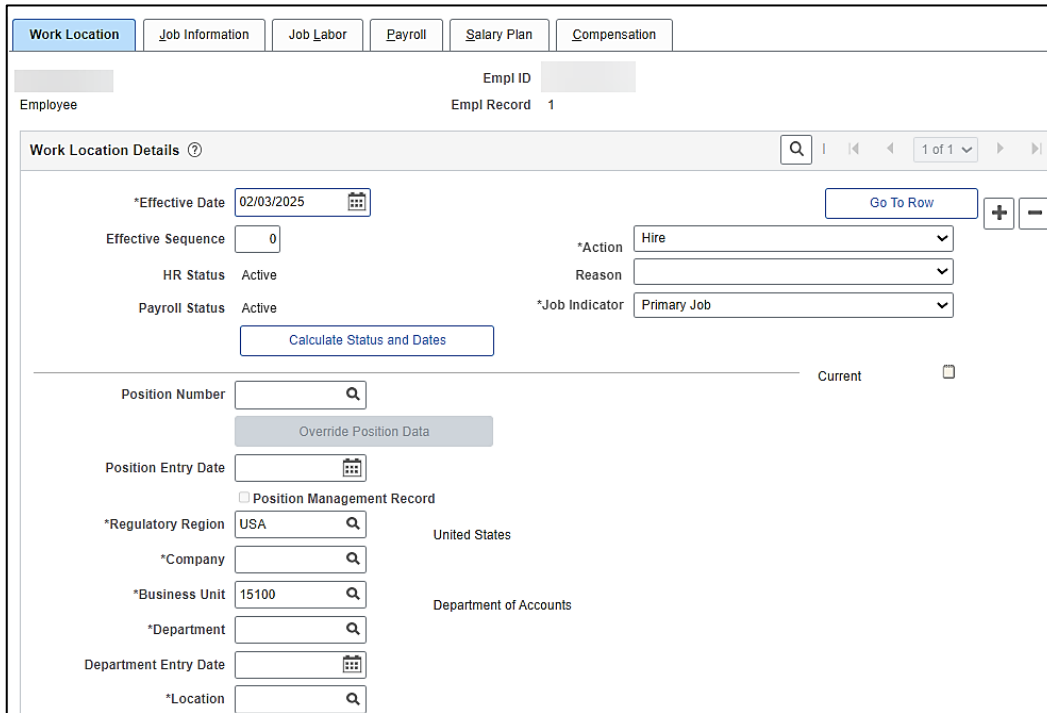
10.	Click the Save button. <div data-bbox="292 1669 933 1753" style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <p> Save Return to Search Notify Refresh </p> </div>
-----	--

	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
<p>The following question will display.</p> <div data-bbox="375 527 1265 793" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #2c4e64; color: white; padding: 5px; display: flex; justify-content: space-between;"> < Biographical Details New Employment Instance </div> <p style="margin-top: 10px;">Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <input type="button" value="Yes"/> <input type="button" value="No"/> </div> </div>	
12.	<p>Click the No button to create a new employment instance.</p> <div data-bbox="293 879 1115 1125" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #2c4e64; color: white; padding: 5px; display: flex; justify-content: space-between;"> < Biographical Details New Employment Instance </div> <p style="margin-top: 10px;">Do you wish to open the Job Data associated to this emplid: Employee Record: 0 (25101,91)</p> <div style="display: flex; justify-content: center; gap: 20px; margin-top: 10px;"> <input type="button" value="Yes"/> <input style="border: 2px solid red;" type="button" value="No"/> </div> </div>
<p>The New Employment Instance page displays.</p> <div data-bbox="418 1213 1219 1507" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #2c4e64; color: white; padding: 5px; display: flex; justify-content: space-between;"> < Biographical Details New Employment Instance </div> <div style="text-align: center; margin-top: 20px;"> <p>New Employment Instance</p> <p>Empl ID </p> <p>Empl Record 1</p> <div style="background-color: #2c4e64; color: white; padding: 5px 20px; display: inline-block; margin-top: 10px;">Add Relationship</div> </div> </div>	
13.	<p>Click the Add Relationship button to add job information for the new employee record.</p> <div data-bbox="293 1593 1096 1887" style="border: 1px solid black; padding: 10px;"> <div style="background-color: #2c4e64; color: white; padding: 5px; display: flex; justify-content: space-between;"> < Biographical Details New Employment Instance </div> <div style="text-align: center; margin-top: 20px;"> <p>New Employment Instance</p> <p>Empl ID </p> <p>Empl Record 1</p> <div style="background-color: #2c4e64; color: white; padding: 5px 20px; display: inline-block; border: 2px solid red; margin-top: 10px;">Add Relationship</div> </div> </div>

Step	Action
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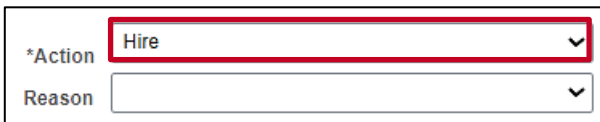
The new **Job Record** for the employee is displayed (**Work Location** tab).



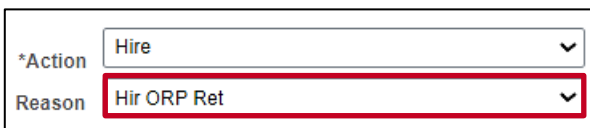
14. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.




- The **Action** field defaults to “Hire”. Do not change.

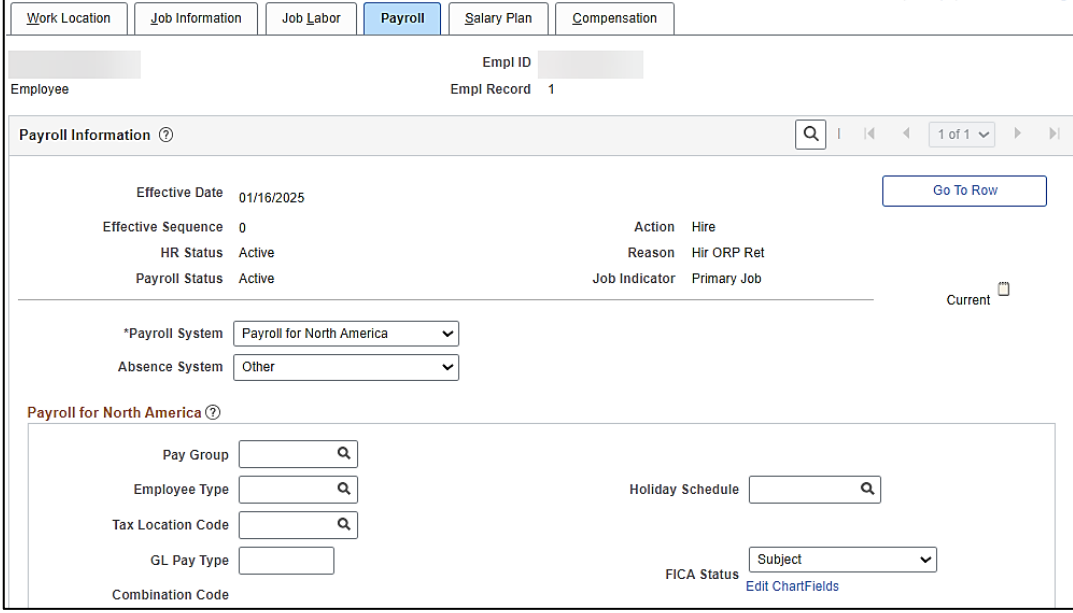

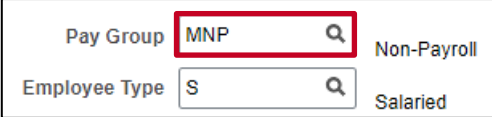



15. Click the **Reason** dropdown button and select “Hire ORP Ret”.



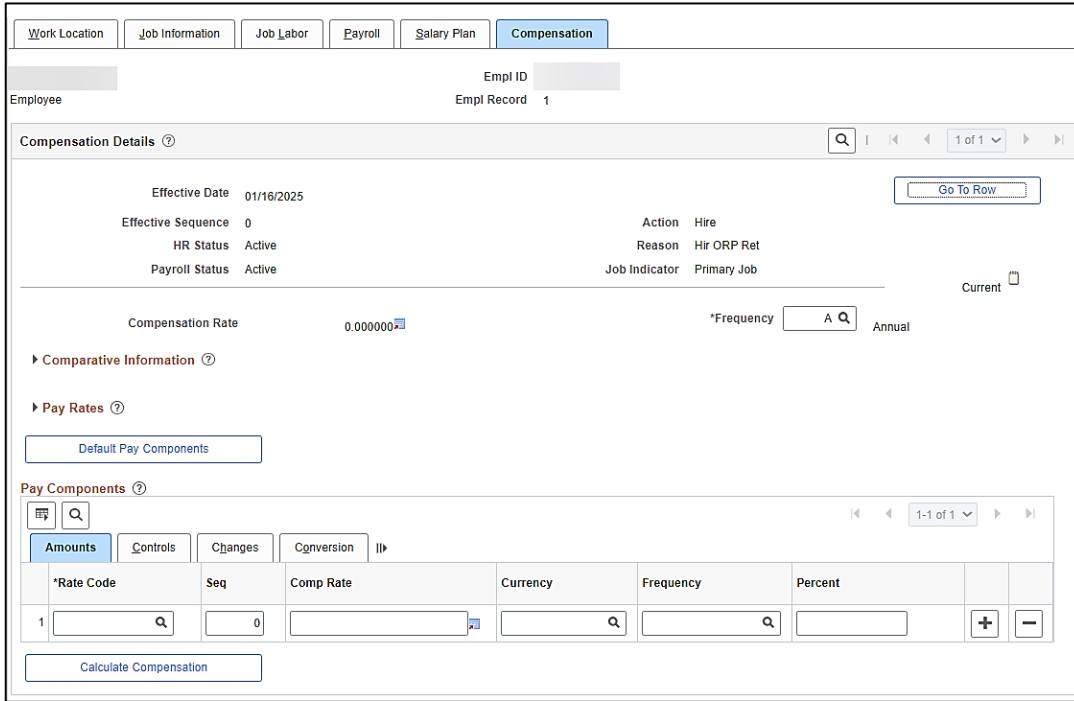


Step	Action																																																																								
16.	<p>Locate and select the ORP position for the agency using the Position Number Look Up icon.</p> <p>Note: Enter “%ORP” to search for the ORP Position Number.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Position Number <input style="border: 2px solid red;" type="text" value="CVAORP00"/> <input type="button" value="Q"/> ORP Retiree Position </div>																																																																								
17.	<p>Click the Job Information tab.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Work Location Job Information Job Labor Payroll Salary Plan Compensation </div>																																																																								
<p>The Job Information tab displays.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> Work Location Job Information Job Labor Payroll Salary Plan Compensation </div> <div style="padding: 5px 0 0 20px;"> Empl ID Employee Empl Record 1 </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> Job Information Details Q < << 1 of 1 >> > </div> <div style="padding: 10px 0 0 20px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Effective Date</td> <td>01/16/2025</td> <td style="width: 30%;"></td> <td style="width: 20%;"></td> <td style="width: 20%; text-align: right;">Action</td> <td>Hire</td> </tr> <tr> <td>Effective Sequence</td> <td>0</td> <td></td> <td></td> <td style="text-align: right;">Reason</td> <td>Hir ORP Ret</td> </tr> <tr> <td>HR Status</td> <td>Active</td> <td></td> <td></td> <td style="text-align: right;">Job Indicator</td> <td>Primary Job</td> </tr> <tr> <td>Payroll Status</td> <td>Active</td> <td></td> <td></td> <td></td> <td style="text-align: right;">Current <input type="checkbox"/></td> </tr> </table> <hr/> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">Job Code</td> <td>ORPHBO</td> <td style="width: 30%;">ORP Retiree</td> <td style="width: 20%;"></td> <td style="width: 20%;"></td> <td></td> </tr> <tr> <td>Entry Date</td> <td>01/16/2025</td> <td></td> <td></td> <td style="text-align: right;">SOC Code</td> <td></td> </tr> <tr> <td>Supervisor Level</td> <td>E</td> <td>Employee</td> <td></td> <td style="text-align: right;">Supervisor Name</td> <td></td> </tr> <tr> <td>Reports To</td> <td colspan="5" style="text-align: center;">View Current Incumbents</td> </tr> <tr> <td>Regular/Temporary</td> <td>Regular</td> <td>Full/Part</td> <td>Part-Time</td> <td></td> <td></td> </tr> <tr> <td>Empl Class</td> <td><input type="text" value="Regular"/></td> <td>*Officer Code</td> <td><input type="text" value="None"/></td> <td></td> <td></td> </tr> <tr> <td>Regular Shift</td> <td>Not Applicable</td> <td>Shift Rate</td> <td><input type="text"/></td> <td></td> <td></td> </tr> <tr> <td>Classified Ind</td> <td>Classified</td> <td>Shift Factor</td> <td><input type="text"/></td> <td></td> <td></td> </tr> </table> </div> </div>		Effective Date	01/16/2025			Action	Hire	Effective Sequence	0			Reason	Hir ORP Ret	HR Status	Active			Job Indicator	Primary Job	Payroll Status	Active				Current <input type="checkbox"/>	Job Code	ORPHBO	ORP Retiree				Entry Date	01/16/2025			SOC Code		Supervisor Level	E	Employee		Supervisor Name		Reports To	View Current Incumbents					Regular/Temporary	Regular	Full/Part	Part-Time			Empl Class	<input type="text" value="Regular"/>	*Officer Code	<input type="text" value="None"/>			Regular Shift	Not Applicable	Shift Rate	<input type="text"/>			Classified Ind	Classified	Shift Factor	<input type="text"/>		
Effective Date	01/16/2025			Action	Hire																																																																				
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Regular Shift	Not Applicable	Shift Rate	<input type="text"/>																																																																						
Classified Ind	Classified	Shift Factor	<input type="text"/>																																																																						
18.	<p>Click the Empl Class dropdown button and select “ORPRetiree”.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Regular/Temporary Regular Empl Class <input type="text" value="ORPRetiree"/> </div>																																																																								
19.	<p>Click the Payroll tab.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Work Location Job Information Job Labor Payroll Salary Plan Compensation </div>																																																																								

Step	Action
	<p>The Payroll tab displays.</p> 
	<p>The Payroll System field defaults to “Payroll for North America”. Do not change. The Absence System field defaults to “Other”. Do not change.</p>
<p>20.</p>	<p>Click the Pay Group Look Up icon and select “MNP”.</p> <p>Note: This is the Non-Payroll pay group.</p> 
<p>21</p>	<p>Click the Compensation tab.</p> 

Step	Action
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The **Compensation** tab displays.



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

Employee [redacted] Empl ID [redacted]
Empl Record 1

Compensation Details ②

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

Compensation Rate 0.000000 *Frequency Annual Current

▶ Comparative Information ②

▶ Pay Rates ②

Default Pay Components

Pay Components ②

Amounts | Controls | Changes | Conversion | **||**

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0			<input type="text" value="A"/>		+	-

Calculate Compensation

22.	<p>Click the Frequency Look Up icon and change the selection from “A” to “M”.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>*Frequency M Monthly</p> </div>
23	<p>Click the Defaults Pay Components button.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p style="text-align: center;">Default Pay Components</p> </div>
24	<p>Click the Calculate Compensation button.</p> <p>Note: No additional Pay Components fields should be entered.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p style="text-align: center;">Calculate Compensation</p> </div>
25.	<p>Click the Benefits Program Participation link.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p style="text-align: center;">Job Data Employment Data Earnings Distribution Benefits Program Participation</p> </div>

Step	Action
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The **Benefit Program Participation** page displays.

Benefit Program Participation

Employee
Empl ID

Empl Record 1

Benefit Status ?
🔍 | ⏪ | ⏩ | 1 of 1

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 ?

BAS Group ID	<input style="width: 80%;" type="text"/>				
Elig Fld 1	<input style="width: 80%;" type="text"/>	Elig Fld 2	<input style="width: 80%;" type="text"/>	Elig Fld 3	<input style="width: 80%;" type="text"/>
Elig Fld 4	<input style="width: 80%;" type="text"/>	Elig Fld 5	<input style="width: 80%;" type="text"/>	Elig Fld 6	<input style="width: 80%;" type="text"/>
Elig Fld 7	<input style="width: 80%;" type="text"/>	Elig Fld 8	<input style="width: 80%;" type="text"/>	Elig Fld 9	<input style="width: 80%;" type="text"/>

Benefit Program Participation Details ?
🔍 | ⏪ | ⏩ | 1 of 1 | [View All](#)

Effective Date	01/16/2025	Currency Code	USD
Benefit Program	PSX	Sys delivered empty Ben Pgm	

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 ?

BAS Group ID	<input style="width: 80%;" type="text"/>				
Elig Fld 1	<input style="width: 80%;" type="text"/>	Elig Fld 2	<input style="width: 80%; border: 2px solid red;" type="text" value="007008000"/>	Elig Fld 3	<input style="width: 80%; border: 2px solid red;" type="text" value="N"/>
Elig Fld 4	<input style="width: 80%;" type="text"/>	Elig Fld 5	<input style="width: 80%;" type="text"/>	Elig Fld 6	<input style="width: 80%;" type="text"/>
Elig Fld 7	<input style="width: 80%;" type="text"/>	Elig Fld 8	<input style="width: 80%; border: 2px solid red;" type="text" value="12-12"/>	Elig Fld 9	<input style="width: 80%; border: 2px solid red;" type="text" value="RR-GB"/>

27. Click the **OK** button.

OK

Cancel

Apply

28.. Run the **Employee Activity Report** for the employee using the following navigation path:
NavBar > Menu > Workforce Administration > Job Information > Reports > Employee Activity Report

Step	Action
29..	<p>Print the report and place the printed transaction in the employee file for future audit requests.</p> <p>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.</p>