

Managing Terminations and Transfers Overview

This Job Aid provides information and step-by-step instructions utilized by Agency Benefits Administrators (BAs) to manage termination and transfer Benefit Events.

When an employee is terminated from their Agency, a "TER" Benefit Event is automatically created in Cardinal. This "TER" Benefit Event will automatically be processed and finalized by the Benefit Administration process that runs each evening. If the Benefit Event needs to be manually processed prior to the evening run of the Benefits Administration process, complete the steps documented in the <u>Manually Processing a Termination Event (TER)</u> section of this Job Aid.

When an employee transfers out of their Agency, an "XFO" Benefit Event is created in Cardinal. The Sending Agency BA should process and finalize the "XFO" Benefit Event right away because this Benefit Event must be Finalized/Enrolled before the receiving Agency BA can process the "XFR" Benefit Event. The steps used to process this Benefit Event are documented in the <u>Processing a</u> <u>Transfer Out Benefit Event – Sending Agency</u> section of this Job Aid.

When an Inter-Agency transfer is processed for an employee, their Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments are not stopped or changed in any way. All other retirement enrollments are terminated once the Sending Agency processes the "XFO" Benefit Event. The steps used to process this Benefit Event are documented in the <u>Processing a Transfer In</u> <u>Benefit Event – Receiving Agency</u> section of this Job Aid.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process 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> 2; after Steps 1 and 4; <u>Section 3</u> ; after Steps 1 and 7). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



Manually Processing a Termination Benefit Event (TER)

Step	Action
1.	Once the employee's Job Record has been terminated in Cardinal by an Agency Human Resources Administrator, access the On-Demand Event Maintenance page using the following navigation path:
	NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

The **On-Demand Event Maintenance Search** page displays.

← Cardinal Homepag		On-Demand E	Event Maintenance	
On-Demand Even	Maintenance			
Find an Existing	alue			
✓ Search Criteria Enter any information yo	have and click Search Teave fields blank for a list of all values			
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	Empl ID begins with v			
	Empl Record = v			
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	Show fewer options			
	Search Clear			
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Step	Action
The On-I	Demand Event Maintenance page displays for the applicable employee.
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0	n-Demand Event Maintenance
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	Activity Date 06/18/2024 Source Job Data Change Empl Record 0 Schedule/Prepare Activity Pending Activities 1 Show Activities Action
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	Event ID 0 Event Date Status Class Prepare Options Event Status Event Status
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	Election Entry Entered 0 of 0 Show Plans
	Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults
	Confirmation Statement Run Date
	Reprocess Indicator N Normal Processing
	Save Return to Search Notify
4.	Review the Activity Date field. For Termination Events, this date will be auto-populated based on the effective date of the Termination transaction processed by HR. Ensure that
	this date is accurate.
	On-Demand Event Maintenance
	Person ID Ben Record 0
	Activity Date 06/18/2024 Source Job Data Change Empl Record 0
A	The Source field will be "Job Data Change". The Action field will default to "TER"
	Activity Date 06/18/2024 Source Job Data Change Empl Record 0
	Schedule/Prepare Activity Pending Activities 1 Show Activities Action
	Event ID 0 Event Date Status Class Event Status Update
5.	Click the Schedule/Prepare Activity button.
	Schedule/Prepare Activity
A	Clicking the Schedule/Prepare Activity button will launch an automated program that
	schedules and prepares the activity.



Step	Action
6.	A Confirmation message displays in a pop-up window once the automated program completes. Click the OK button.
	Process completed successfully. (3000,530)
The On-D	emand Event Maintenance page redisplays.
	Cardinal Homepage On-Demand Event Maintenance
7.	Ch-Demand Event Maintenance Person ID Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepara Activity Pending Activities 0 Show Activities Action Event D 3 Event Date 06/18/2024 Status Prepared Class TER Event Status Update Preparo Options Event Status Open for Processing Enrolment Statement Run Date Prequency Annual Frequency Validate/Finalize Errors 0 Show Firors Pinalize/Apply Defaults Run Date Reprocess Process Indicator N Run Date Reprocess Process Indicator N Run Processing Stave Return to Search Notify
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i	If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.



Step	Action
8.	Click the Finalize/Apply Defaults checkbox option.
	Finalize/Apply Defaults
9.	Click the Validate/Finalize button.
	Validate/Finalize Errors 0
i	All benefits will be terminated for the employee once the Validate/Finalize button has been clicked.
10.	A Confirmation message displays in a pop-up window once the process completes.
	Click the OK button.
	Process completed successfully. (3000,530)
The On-D	emand Event Maintenance page redisplays.
< 0	cardinal Homepage On-Demand Event Maintenance
On	Demand Event Maintenance
	Person ID Ben Record 0
	Schedule/Prepare Activity Pending Activities 0 Show Activities Action
E	Vent ID 3 Event Date 06/18/2024 Status Finalized - Enrolled Class TER Event Status Update Prepare Options Event Status Closed to Processing
	Enrollment Statement Run Date Frequency
	Election Entry Entered 0 of 0 Show Plans
	Validate/Finalize 0 Show Errors O Finalize/Apply Defaults
	Confirmation Statement Run Date
	Reprocess Indicator N Normal Processing
Sa	Ve Return to Search Notify



Step	Action
i	The Status field will now display as "Finalized-Enrolled". The Event Status field will still display as "Closed to Processing".
	Activity Date Source Empl Record 0
	Schedule/Prepare Activity Pending Activities 0 Show Activities Action
	Event ID 3 Event Date 06/18/2024 Status Finalized - Enrolled Class TER Event Status Update
	Prepare Options Event Status Closed to Processing
	Enrollment Statement Run Date Frequency
	Deduction requestly Printum requestly
12.	Click the Save button.
	Save Return to Search Notify
	To review the employees benefits to confirm that they have been terminated, navigate to the employees Current Benefits Summary page, or review the employees individual benefit pages (see navigations below). Remember, if the benefits termination date is in the future, the Current Benefits Summary page will not show future dated rows. Use the individual benefit pages in this case.
i	Current Benefits Summary: NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary
	Individual Benefit Pages
	Health Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Health Benefits
	Simple Plan: NavBar > Menu > Benefits > Enroll In Benefits > Simple Benefits
	Imputed Life: NavBar > Menu > Benefits > Enroll In Benefits > Life and AD/D Benefits
	FSA Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts
	Savings Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Savings Plans
	Retirement Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans



Processing a Transfer Out Benefit Event – Sending Agency

When an Inter-Agency transfer is processed for an employee, their Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments are not stopped or changed in any way. All other retirement and Savings Plans enrollments are terminated once the Sending Agency processes the "XFO" Benefit Event. The first portion of this section demonstrates the steps for optionally reviewing the employee's current enrollments prior to processing the "XFO" Benefit Event. To proceed without reviewing the employee's current enrollments, skip to Step 4.

Step	Action
1.	Navigate to the Current Benefits Summary page using the following path: NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary
The Curre	ent Benefits Summary Search page displays.
(\	Cardinal Homepage Current Benefits Summary
Cu Fii Set	rrent Benefits Summary nd an Existing Value Search Criteria fer any information you have and click Search. Leave fields blank for a list of all values.
	③ Recent Searches Choose from recent searches ✓ ✓ □ Saved Searches Choose from saved searches ✓ ✓
	Empl ID begins with • Benefit Record Number = • • Name begins with • Last Name begins with • Business Unit begins with • Business Unit begins with • Oppartment Set ID begins with • Organizational Relationship = • Show fewer options • Clear
i	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 Note : Se	employee's E arches can als	mployee to be perf	ID in the Em	ol ID field. the employee's	s name. However, it is
	Empl II	D begins with				in have a unique Employee iD.
3.	Click the	Search button	l.			
		Search		Clear]	
The Curre	ent Benef	its Summary μ	bage disp	lays for the a	pplicable empl	oyee.
Cardin Benefi	t Enrollment Sum	nary <u>B</u> enefit Deduction	n Summary			Current Benefits Summary
Current E	Benefits Syst Benefit Progr Benefits Sta nrollments	Employee tem Benefits Administration ram SAL Salaried Employ tus Terminated With Bene	ı yee Benefit Pgm fits	ID	Benefit Primary Em	:Record Number 0 ipl Record 0
Plan Type		Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical		Elect	ACC4	COVAEVH	Family	09/30/2021
Imputed Li	fe	Elect	IMPLIF	IMP LIF	Salary X 2	08/10/1998
403(b)		Waive			Waived	10/01/2021
Section 45	7	Waive			Waived	10/01/2021
Flex Spend	ding Medical	Waive			Waived	07/01/2023
Flex Spenden	ding t Care	Waive			Waived	07/01/2023
Employee DB	Retirement	Elect	VRSMDB	VRSMDB	5% of Earnings	09/25/2021
Group Terr	m Life	Elect	GTLR	GTL Reg	0% of Earnings	09/25/2021
Retiree He	alth Credit	Elect	RTCRDR	RHC Reg	0% of Earnings	09/25/2021
VSDP LTD)	Elect	VSDPR	LTD Reg	0% of Earnings	09/25/2021
Flex Spend Fee	ding Admin	Waive			Waived	07/01/2021
Return to Benefit Enro	o Search Dilment Summary	Benefit Deduction Summar	у			



Step	Action
ĺ	When the "XFO" Benefit Event is processed, the Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments will not be terminated. They will carry forward with the employee to their new Agency. All other enrollments will be terminated and the employee will need to re-enroll in these plans at their new Agency.
ĺ	The next portion of this section demonstrates the steps used to manually process the "XFO" Benefit Event. The Sending Agency BA should process and finalize the "XFO" Benefit Event right away because this Benefit Event must be Finalized/Enrolled before the receiving Agency BA can process the "XFR" Benefit Event.
4.	Access the On-Demand Event Maintenance page using the following navigation path:
	NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

The **On-Demand Event Maintenance Search** page displays.

\leftarrow Cardinal Hon	On-Demand Event Maintenance
On-Demand E Find an Exis V Search Criter	vent Maintenance ng Value n on you have and click Search. Leave fields blank for a list of all values.
🕙 Recent Se	rches 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
AI	mate Character Name begins with v
	A Show fewer options
	Case Sensitive
For "Ove Web	nore information pertaining to the Cardinal HCM Search pages, refer to the Job Aid tit rview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal site in Job Aids under Learning .
Ente	r the employee's Employee ID in the Empl ID field.
Note reco	: Searches can also be performed using the employee's name. However, it is mmended to use the Employee ID as every employee will have a unique Employee ID
Er	apl ID begins with 🗸



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Step	Action
6.	Click the Search button.
	Clear
The On-D	emand Event Maintenance page displays for the applicable employee.

The **On-Demand Event Maintenance** page displays for the applicable employee.

Cardinal Homepage	On-Demand Event Maintenance
On-Demand Event Mainter	nance
	Person ID Ben Record 0
Activity Date 07/01/2024	Source Job Data Change Empl Record 0
Schedule/Prepare Activity	Pending Activities 1 Show Activities Action
Event ID 3 Event Da	ate 07/01/2024 Status Prepared Class DIV Event Status Update
	Event Status Open for Processing
Enroliment Statement	Run Date Frequency
	Deduction Frequency O Annual Frequency
Election Entry	Entered o of d Show Plans
Validate/Finalize	Show Errors C Finalize/Apply Defaults
Confirmation Statement	Pup Data
Reprocess	Process Indicator N Q Normal Processing
Save Return to Search	Notify
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Review the Ac on the effective accurate.	etivity Date field. For Transfer Events, this date will be auto-populated bate date of the Transfer transaction processed by HR. Ensure that this date
Save Return to Search Review the Ac on the effective accurate. On-Demand Ever	etivity Date field. For Transfer Events, this date will be auto-populated bate date of the Transfer transaction processed by HR. Ensure that this date
Review the Ac on the effective accurate.	etivity Date field. For Transfer Events, this date will be auto-populated bate date of the Transfer transaction processed by HR. Ensure that this date the Maintenance Person ID Ben Record 0
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Enrollment Statement

Election Entry

Validate/Finalize

Confirmation Statement

Reprocess

Return to Search

Run Date

Entered

Errors 0

Run Date

Notify

0 of

Process Indicator N Q

0

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Step	Action
8.	Click the Schedule/Prepare Activity button.
	Schedule/Prepare Activity
i	Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity.
9.	A Confirmation message displays in a pop-up window once the automated program completes.
	Click the OK button.
	Process completed successfully. (3000,530)
The On-E	emand Event Maintenance page redisplays.
<	Cardinal Homepage On-Demand Event Maintenance
o	Person ID Ben Record 0
	Activity Date Source Empl Record 0
	Schedule/Prepare Activity Pending Activities 0 Show Activities Action
	Event ID 4 Event Date 07/01/2024 Status Prepare Class XFO Event Status Update Prepare Options Event Status Open for Processing Open for Processing Open for Processing

Frequency

Show Plans

Show Errors

Normal Processing

Deduction Frequency
 Annual Frequency

Finalize/Apply Defaults



Step	Action
10.	Confirm that the Status field displays as "Prepared" and the Event Status field displays as "Open for Processing".
	Person ID Ben Record 0
	Activity Date Source Empl Record 0
	Schedule/Prepare Activity Pending Activities 0 Show Activities Action
	Event ID Event Status Update
	Prepare Options Event Status Prepared Event
	Enrollment Statement Run Date Erectionery
	Deduction Frequency Annual Frequency
i	If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.
11.	Click the Finalize/Apply Defaults checkbox option.
	Finalize/Apply Defaults
12.	Click the Validate/Finalize button.
	Validate/Finalize Errors 0
13.	A Confirmation message displays in a pop-up window once the process completes.
	Click the OK button
	Process completed successfully. (3000,530)
	OK



Step	Action
The On-D	emand Event Maintenance page redisplays.
<	Cardinal Homepage On-Demand Event Maintenance
OI	-Demand Event Maintenance
	Person ID Ben Record 0
	Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action
	Event ID 4 Event Date 07/01/2024 Status Finalized - Enrolled Class XFO Event Status Update Prepare Options Event Status Closed to Processing Enrollment Statement Run Date Frequency O Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults Confirmation Statement Run Date Normal Processing
i	The Status field will now display as "Finalized-Enrolled". The Event Status field will still display as "Closed to Processing".
	Event ID 4 Event Date 07/01/2024 Status Finalized - Enrolled Class XFO Event Status Update Prepare Options Event Status Closed to Processing Enrollment Statement Run Date Frequency Deduction Frequency
14.	Click the Save button. Save Return to Search Previous in List Next in List Notify Refresh



Step	Action
	This process is now complete for the Sending Agency. However, users can optionally review the employee's updated enrollments after processing the "XFO" Benefit Event in order to ensure that the correct enrollments were terminated. If the effective date of the Transfer Out is future dated, the Current Benefits Summary page will not display future dated rows. Use the individual benefit pages in this case.
A	Current Benefits Summary: NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary
	Individual Benefit Pages
	Health Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Health Benefits
	Simple Plan: NavBar > Menu > Benefits > Enroll In Benefits > Simple Benefits
	Imputed Life: NavBar > Menu > Benefits > Enroll In Benefits > Life and AD/D Benefits
	FSA Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts
	Savings Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Savings Plans
	Retirement Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans



Processing a Transfer In Benefit Event – Receiving Agency

When an Inter-Agency transfer is processed for an employee, their Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments are not stopped or changed in any way. All other retirement enrollments are terminated once the Sending Agency processes the "XFO" Benefit Event. The first portion of this section demonstrates the steps that must be performed by the Receiving Agency in order to confirm that the Sending Agency HR processed the Transfer Out job data transaction and verify the transfer date. Additionally, this process is used to confirm that the "XFO" Benefit Event has been processed. <u>The Receiving Agency HR Administrator cannot process the Transfer In transaction until this is confirmed and the same effective date must be used for the Transfer In job data transaction to avoid a break in service for the employee.</u>

Step	Action
1.	Access the Person Organizational Summary page using the following navigation path:
	NavBar > Menu > Workforce Administration > Personal Information > Person Organizational Summary

The Person Organizational Summary Search page displays.

Cardinal Homepage	Person Organizational Summary
Person Organization Find an Existing Va	lal Summary
 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 🖓 Saved Searches Choose from saved searches V
	Empl ID begins with V
	Name begins with •
	Last Name begins with
Alternate C	Aracter Name begins with Aracter Show fewer options
	Case Sensitive
	Search
For more "Overview Website in	information pertaining to the Cardinal HCM Search pages, refer to the Job Aid title of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal of Job Aids under Learning .
Enter the	employee's Employee ID in the Empl ID field.
Note: Sea recomme	irches can also be performed using the employee's name. However, it is nded to use the Employee ID as every employee will have a unique Employee ID.
Empl ID	begins with 🗸



Step	Action
3.	Click the Search button.
	Search Clear

The Person Organizational Summary page displays for the applicable employee.

<	Cardinal Hom	epage					Person	Organizational	Summary						
F	Person Orga	nizational S	ummary			Porson ID									
					'										
•	 Employment 	t Instances							٩		< 10	1 🗸 🕨	I View.	All	
	ORG Insta HR St Assignments	ance 0 atus Inactive		Last Hire Payroll Status	08/10/1998 Terminated		Termination Date	06/30/2024							
	E Q										I	1-1 of 1	• • •		
	Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	e Job Co	de G	Grade	Benefits Sta	tus		
	C	Inactive	Terminated	07/01/2024	99900	08/10/1998	Other Non-Classifie	d 06/30/2024	4 96714			Term W/Ben			
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Step	Action					
A	At this point, the Receiving Agency HR must complete the Hire: Transfer In job data transaction using the same effective date that the Sending Agency used for the Termination: Transfer Out job data transaction. After this transaction is completed by HR, review the employee's enrollments to verify the following:					
	 Health, Premium Reward, FSA Plans, FSA Fee, and Imputed Life <u>have not</u> been terminated by the Sending Agency 					
	 Retirement and Savings Accounts all show terminated as of the 1st of the month following the transfer 					
	To review the employees benefits to confirm that only the employee's retirement and Savings Accounts enrollments have been terminated, navigate to the employees Current Benefits Summary page, or review the employees individual benefit pages (see navigations below). Remember, if the benefits termination date is in the future, the Current Benefits Summary page will not show future dated rows. Use the individual benefit pages in this case. Current Benefits Summary: NavBar > Menu > Benefits > Review Employee Benefits >					
i	Current Benefits Summary					
	Health Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Health Benefits					
	Simple Plan: NavBar > Menu > Benefits > Enroll in Benefits > Simple Repetits					
	Imputed Life: NavBar > Menu > Benefits > Enroll In Benefits > Life and AD/D Benefits					
	FSA Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts					
	Savings Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Savings Plans					
	Retirement Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans					



Step	Action
6.	Review the employee's benefit enrollments (navigations above) to ensure that only the retirement and Savings Plans enrollments have a coverage election of "Terminate". Keep the following in mind:
	 During review of the employee's health plan enrollment, take note if the employee is enrolled in a regional HMO plan (Kaiser or Optima). Employees are eligible to enroll in a regional HMO plan based on a live or work policy meaning that the employee must either live or work in that coverage region in order to enroll in the regional HMO plan. If the employee is enrolled in a regional HMO plan and as part of this Agency transfer, the employee will no longer live or work in that coverage region, the "XFR" Benefit Event (covered subsequently in this Job Aid) must be used to enroll the employee in the new health plan that they elect
	 If all the employee's benefit enrollments have been terminated, this indicates that the Sending Agency HR Administrator used the incorrect Action Reason when entering the Termination: Transfer Out job data transaction. In these cases, submit a VCCC Ticket to the Cardinal Post Production Support (PPS) Team with "Cardinal Benefits" in the Subject line as the Cardinal PPS Team will need to resolve this issue
	 If none of the employee's benefit enrollments have been terminated, this indicates that either the Sending Agency HR has not completed the Termination: Transfer Out job data transaction or it was completed after the Receiving Agency's HR completed the Hire: Transfer In job data transaction. In these cases, submit a VCCC Ticket to the Cardinal Post Production Support (PPS) Team with "Cardinal Benefits" in the Subject line as the Cardinal PPS Team will need to resolve this issue
i	When the Receiving Agency HR completes the Hire: Transfer In job data transaction, an "XFR" (Transfer In) Benefit Event is automatically created. The next portion of this section demonstrates the steps used to manually process the "XFR" Benefit Event. The sending Agency BA should process and finalize the "XFR" Benefit Event immediately unless the employee is making a health plan enrollment change based on moving in or out of a regional HMO plan coverage region. If the employee is making a health plan change for this reason, the "XFR" Benefit Event must be completed within 29 days (the "XFR" Benefit Event will systematically close after 29 days). The proceeding steps of this section are used to manually finalize the "XFR" Benefit Event.
7.	Next, the "XFR" Benefit Event must be processed. Access the On-Demand Event Maintenance page using the following navigation path:
	NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance



Step	Action		
The On-Demand Event Maintenance Search page displays.			
$\left(\leftarrow \mathbf{c}\right)$	ardinal Homepage On-Demand Event Maintenance		
On-I	Demand Event Maintenance		
Fine V Se Enter	d an Existing Value varch Criteria rany information you have and click Search. Leave fields blank for a list of all values.		
Ę	Recent Searches Choose from recent searches V 🆉 🔉 Saved Searches Choose from saved searches		
i	Empl ID begins with Empl Record = Name begins with Last Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with Show fewer options Case Sensitive Second Clear 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		
	vvebsite in Job Alds under Learning .		
8.	Enter the employee's Employee ID in the Empl ID field. Note : Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID. Empl ID begins with		
9.	Click the Search button.		



Step	Action			
The On-Demand Event Maintenance page displays for the applicable employee.				
	Cardinal Homepage On-Demand Event Maintenance			
	On-Demand Event Maintenance			
	Person ID Ben Record 0			
	Activity Date 07/01/2024 Source Job Data Change Empl Record 1			
	Pending Activities 1 Snow Activities Action XFR			
	Event ID 3 Event Date 07/01/2024 Status Prepared Class DIV Event Status Prepare Ontions Event Status			
	Enrollment Statement Run Date Encourses			
	O Deduction Frequency Annual Frequency			
	Election Entry Entered of Show Plans			
	Validate/Finalize			
	Confirmation Statement Run Date			
	Reprocess Indicator N Q			
	Save Return to Search Previous in List Notify			
10.	Review the Activity Date field. For Transfer Events, this date will be auto-populated based on the effective date of the Hire: Transfer In transaction processed by HR. Ensure that this date is accurate			
	Person ID Ben Record 0			
	Activity Date 07/01/2024 Source Job Data Change Empl Record 1			
i	The Source field will be "Job Data Change". The Action field will default to "XFR" (Transfer In).			
	Person ID Ben Record 0			
	Activity Date 07/01/2024 Source Job Data Change Empl Record 1			
	Schedule/Prepare Activity Pending Activities 1 Show Activities Action XFR			
	Event ID 3 Event Date 07/01/2024 Status Prepared Class DIV Event Status Update			
	Prepare Options Event Status Open for Processing			
11.	Click the Schedule/Prepare Activity button.			
	Schedule/Prepare Activity			
i	Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity.			



Step	Action			
12.	A Confirmation message displays in a pop-up window once the automated program completes.			
	Click the OK button.			
	Process completed successfully. (3000,530)			
	OK			

The **On-Demand Event Maintenance** page redisplays.

		Person in Dell Record 0	
Activity Date	Source	Empl Record 0	
Schedule/Prepare Activity	Pending Activities 0	Show Activities Action	
Event ID 5 Event Date	07/01/2024 Status P	repared Class XFR Event Status Update	
Prepare Options		Event Status Open for Processing	
Enrollment Statement	Run Date	Frequency	
		Deduction Frequency Annual Frequency	
Election Entry			
Election Entry	Entered 0 of 0	Snow Plans	
Validate/Finalize	Errors 0	Show Errors Finalize/Apply Defaults	
Confirmation Statement	Run Date		



Step	Action
13.	Confirm that the Status field displays as "Prepared" and the Event Status field displays as "Open for Processing".
	Person ID Ben Record 0
	Activity Date Source Empl Record 0
	Schedule/Prepare Activity Pending Activities 0 Show Activities Action
	Event ID 5 Event Date 07/01/2024 Status Prepared Class XFR Event Status Update Prepare Options Event Status Open for Processing
	Enrolment Statement Run Date Frequency
	Deduction Frequency Annual Frequency
i	If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.
14.	Click the Finalize/Apply Defaults checkbox option.
	Finalize/Apply Defaults
15.	Click the Validate/Finalize button.
	Velidete/ElizePro
	Errors 0
16.	A Confirmation message displays in a pop-up window once the process completes.
	Click the OK button.
	Process completed successfully. (3000,530)
	OK



Step	Action			
The On-Demand Event Maintenance page redisplays.				
¢	ardinal Homepage On-Demand Event Maintenance			
Or	n-Demand Event Maintenance			
	Person ID Ben Record 0			
	Activity Date Source Empl Record 0			
	Schedule/Prepare Activity Pending Activities 0 Show Activities Action			
	Event ID 5 Event Date 07/01/2024 Status Finalized - Enrolled Class XFR Event Status Update			
	Event status Closed to Processing			
	Obduction Frequency OAnnual Frequency			
	Validate/Finalize			
	Confirmation Statement Run Date			
	Reprocess Process Indicator N			
	Normal Processing Save Return to Search Previous in List Next in List Notify			
	The Status field will now display as "Finalized-Enrolled". The Event Status field will still display as "Closed to Processing"			
	Person ID Ben Record 0			
	Activity Date Source Empl Record 0			
A	Schedule/Prepare Activity Pending Activities 0 Show Activities Action			
	Event ID 5 Event Date 07/01/2024 Status Finalized - Enrolled Class XFR Event Status Update			
	Prepare Options Event Status Closed to Processing			
	Enrollment Statement Run Date Frequency			
17.	Click the Save button.			
	Save Return to Search Previous in List Next in List Notify			



Step	Action
i	At this point, users can optionally review the employee's updated enrollments after processing the "XFR" Benefit Event in order to ensure that only the retirement and Savings Plans enrollments were terminated. If the effective date of the Transfer In is future dated, the Current Benefits Summary page will not display future dated rows. Use the individual benefit pages in this case.
	Current Benefits Summary: NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary
	Individual Benefit Pages
	Health Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Health Benefits
	Simple Plan: NavBar > Menu > Benefits > Enroll In Benefits > Simple Benefits
	Imputed Life: NavBar > Menu > Benefits > Enroll In Benefits > Life and AD/D Benefits
	FSA Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Spending Accounts
	Savings Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Savings Plans
	Retirement Benefits: NavBar > Menu > Benefits > Enroll In Benefits > Retirement Plans
1	Assist the employee as needed to ensure that any retirement or Savings Plans enrollments are reestablished based on the following guidelines:
	 Ensure that the employee's VNAV Record is established in a timely manner by monitoring the VNAV Cancel Records Report daily and having HR manually load the job information into VNAV if necessary
	 Inform the employee they will need to reenroll in the Annuity/Deferred Compensation plans (it is the employee's responsibility to do so)