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 Manually Processing a Termination Event (TER) 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 Processing a Transfer Out Benefit Event – Sending Agency 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 Processing a Transfer In Benefit Event – Receiving Agency 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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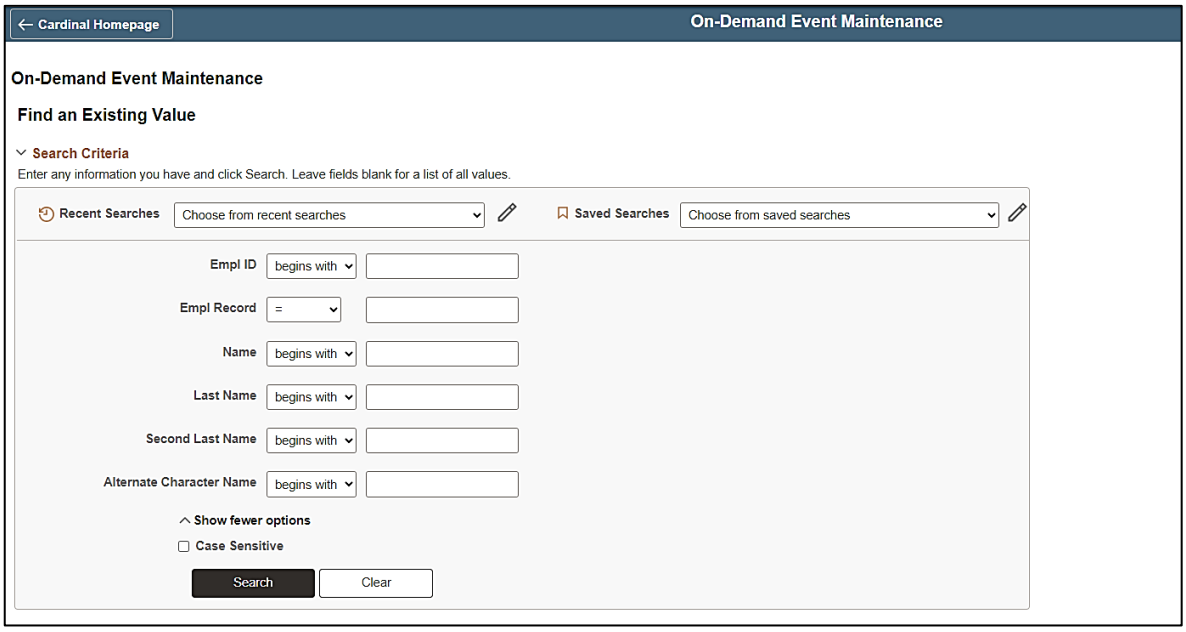
Revision History

Revision Date	Summary of Changes
12/8/2025	Notes added in all sections to provide additional information regarding the Schedule/Prepare Activity button.
3/1/2025	Updated the screenshots of the Search pages (Section 1; after Step 1; Section 2; after Steps 1 and 4; Section 3; 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.

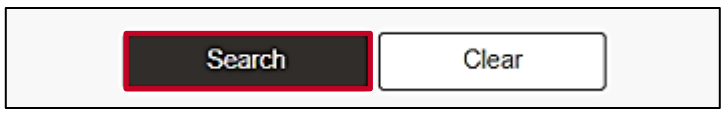


For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

2. Enter the employee's Employee ID in the **Empl ID** field.

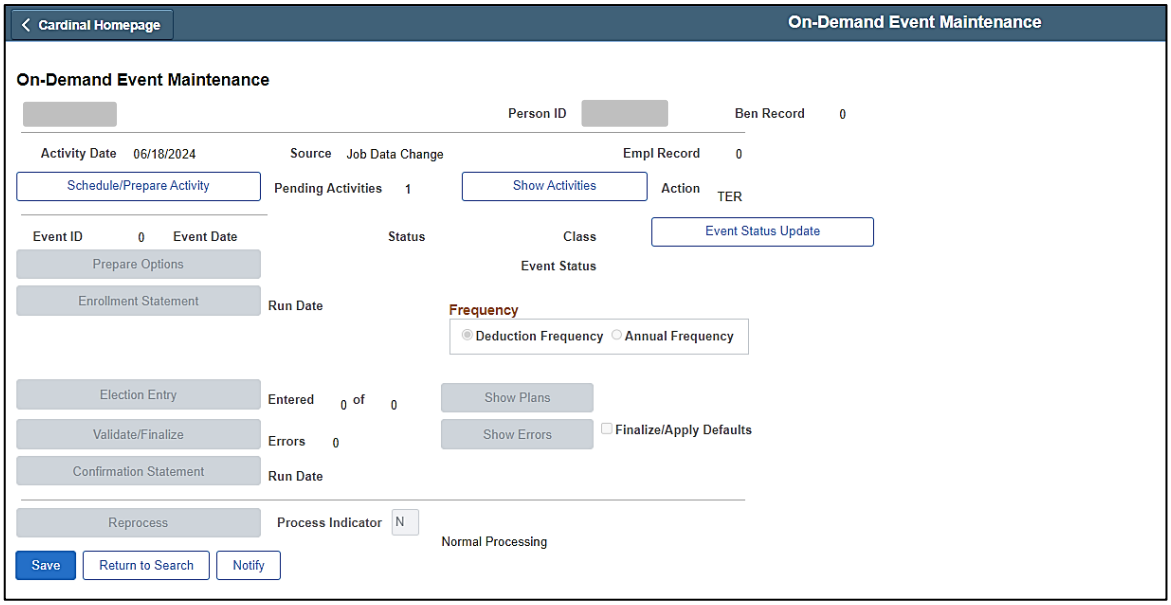
Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

3. Click the **Search** button.

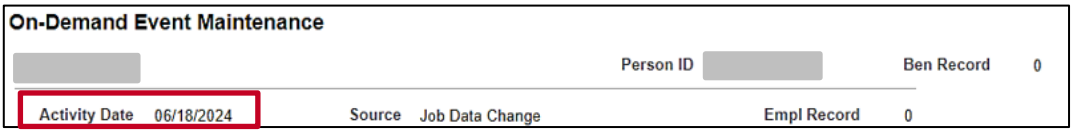


Step	Action

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

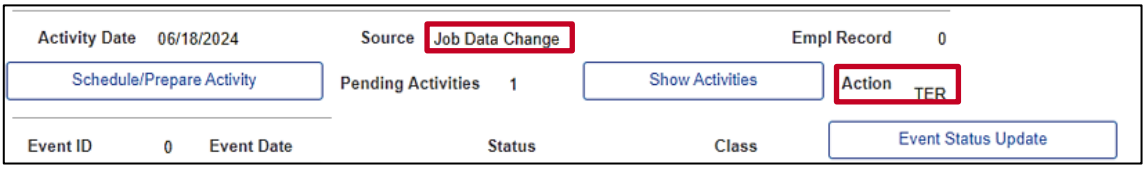


4. Review the **Activity Date** field. For Termination Events, this date auto-populates based on the effective date of the Termination transaction processed by HR. Ensure that this date is accurate.



The **Source** field will be "Job Data Change".

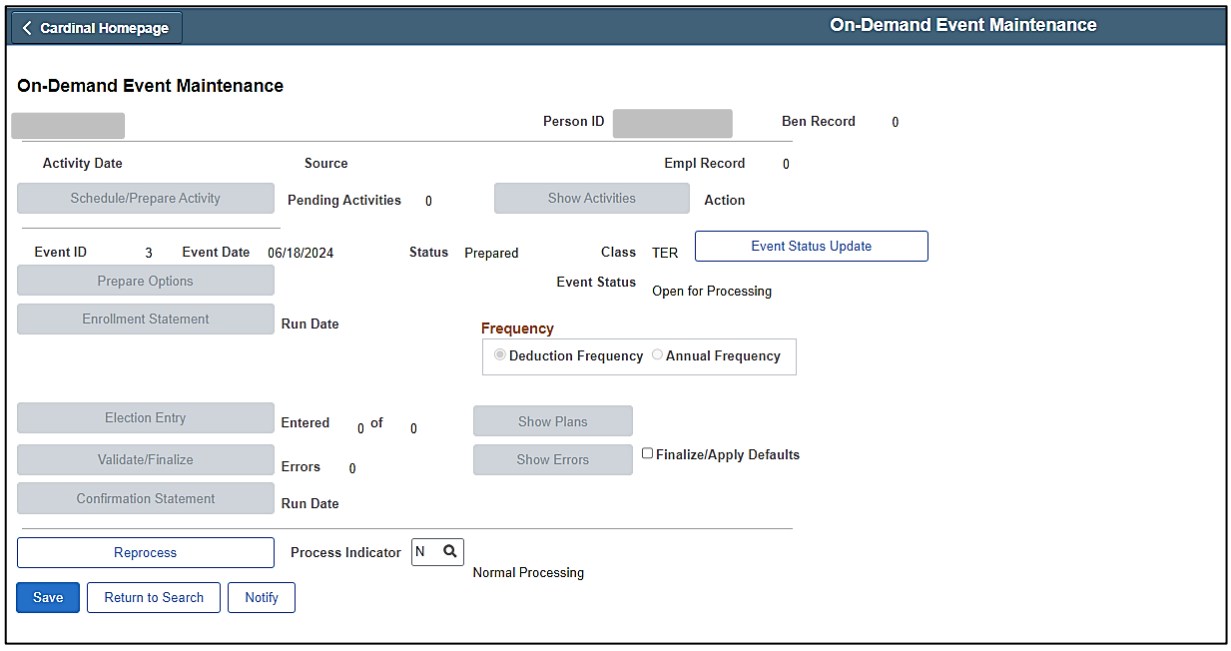
The **Action** field will default to "TER" (Termination).

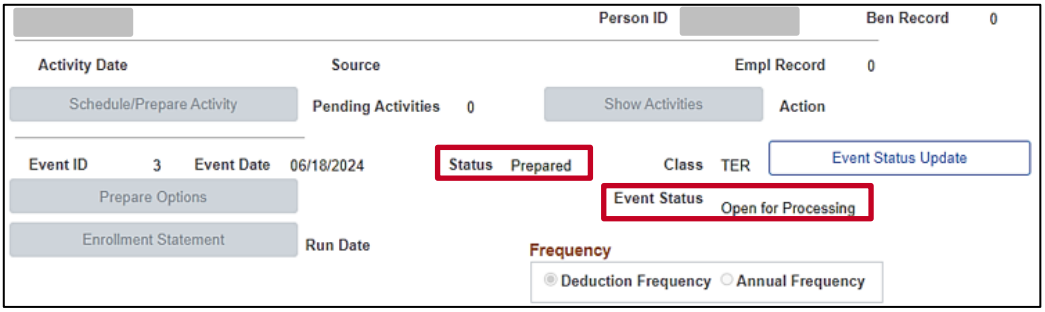


5. Click the **Schedule/Prepare Activity** button.

Step	Action
6.	If the Benefits Administration process has already run, the **Schedule/Prepare Activity** button will be disabled, and the **Pending Activities** field will display a “0”. In this case, proceed to Step 8. If the **Pending Activities** field displays a “1”, click the **Schedule/Prepare Activity** button. **Note**: Clicking the **Schedule/Prepare Activity** button will launch an automated program (Benefits Administration process) that schedules and prepares the activity.
7.	A **Confirmation** message displays in a pop-up window once the automated program completes. Click the **OK** button.

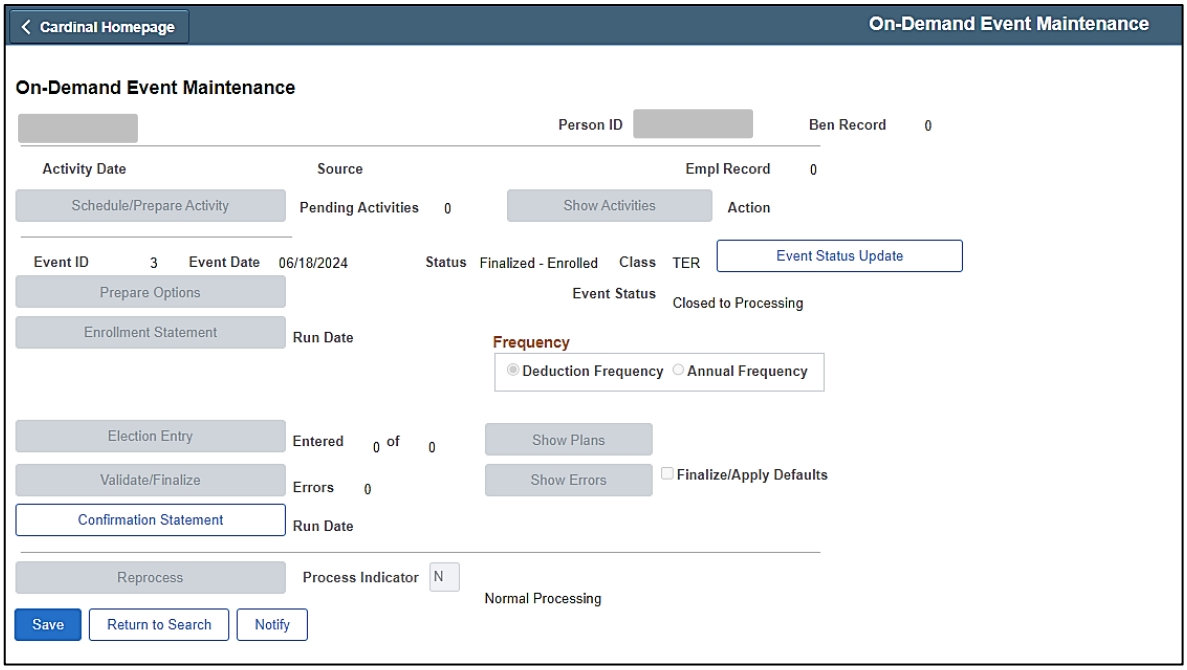
The **On-Demand Event Maintenance** page redisplays.



Step	Action
8.	Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”. 
	If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.
9.	Click the **Finalize/Apply Defaults** checkbox option.
10.	Click the **Validate/Finalize** button.
	All benefits will be terminated for the employee once the **Validate/Finalize** button has been clicked.
11.	A **Confirmation** message displays in a pop-up window once the process completes. Click the **OK** button.

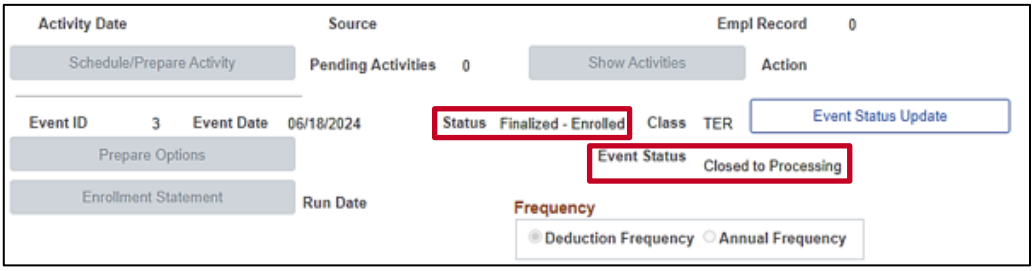
Step	Action

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



The **Status** field will now display as “Finalized-Enrolled”.

The **Event Status** field will still display as “Closed to Processing”.



12. Click the **Save** button.

Step	Action
	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. 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**

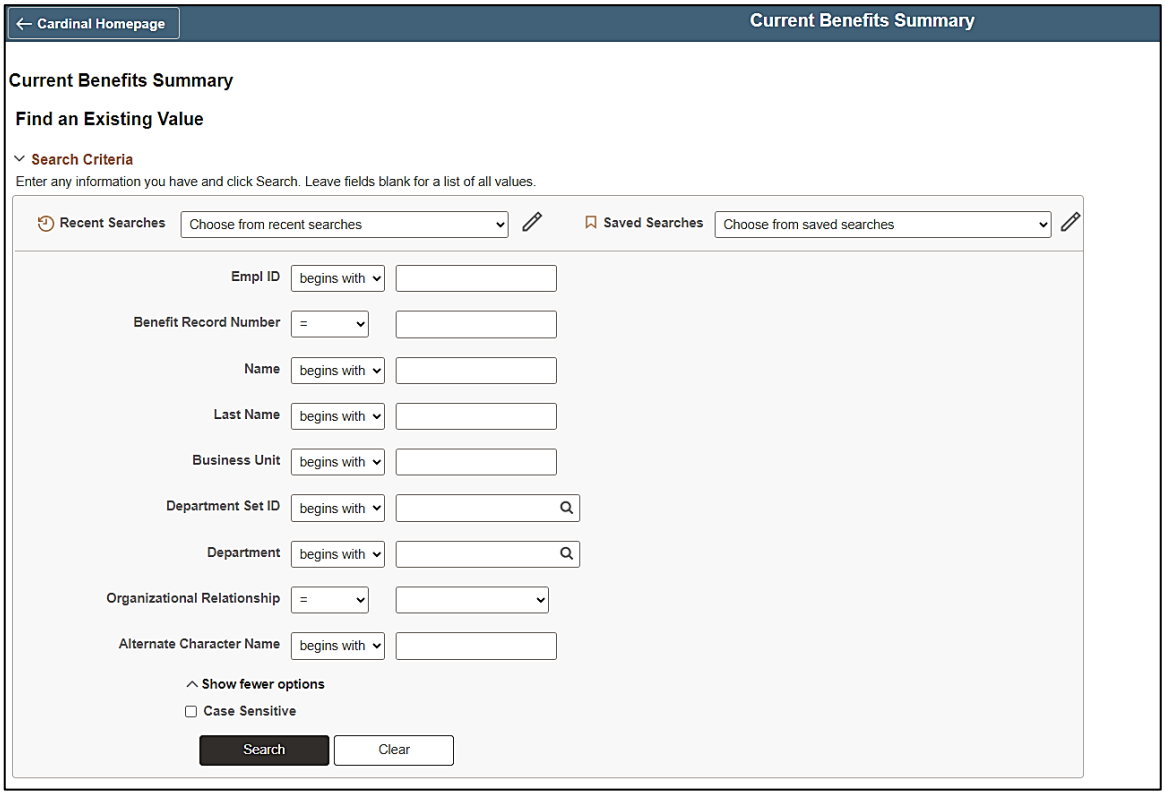
Processing a Transfer Out Benefit Event – Sending Agency

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.

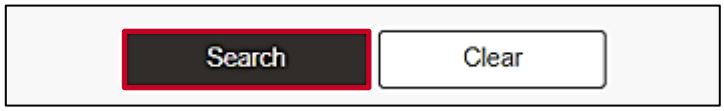
The first portion of this section demonstrates the steps for optionally reviewing the employee's current enrollments prior to processing the "XFO" Benefit Event. To proceed without reviewing the employee's current enrollments, skip to Step 4.

Step	Action
1.	Navigate to the **Current Benefits Summary** page using the following path: **NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary**

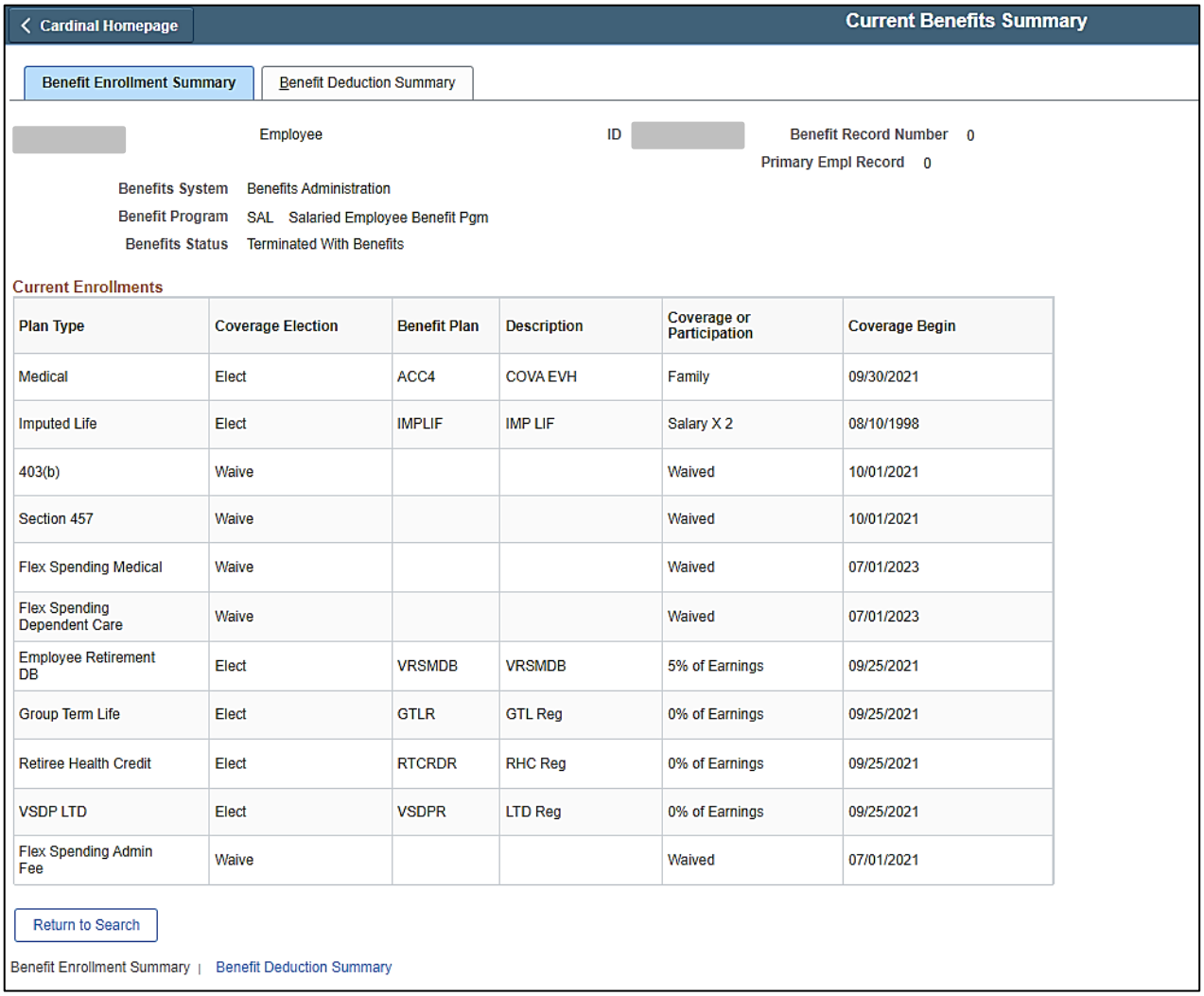
The **Current Benefits Summary Search** page displays.



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**: 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.
3.	Click the **Search** button. 

The **Current Benefits Summary** page displays for the applicable employee.



Cardinal Homepage — Current Benefits Summary

Benefit Enrollment Summary | Benefit Deduction Summary

Employee ID Benefit Record Number 0
Primary Empl Record 0

Benefits System Benefits Administration
Benefit Program SAL Salaried Employee Benefit Pgm
Benefits Status Terminated With Benefits

Current Enrollments

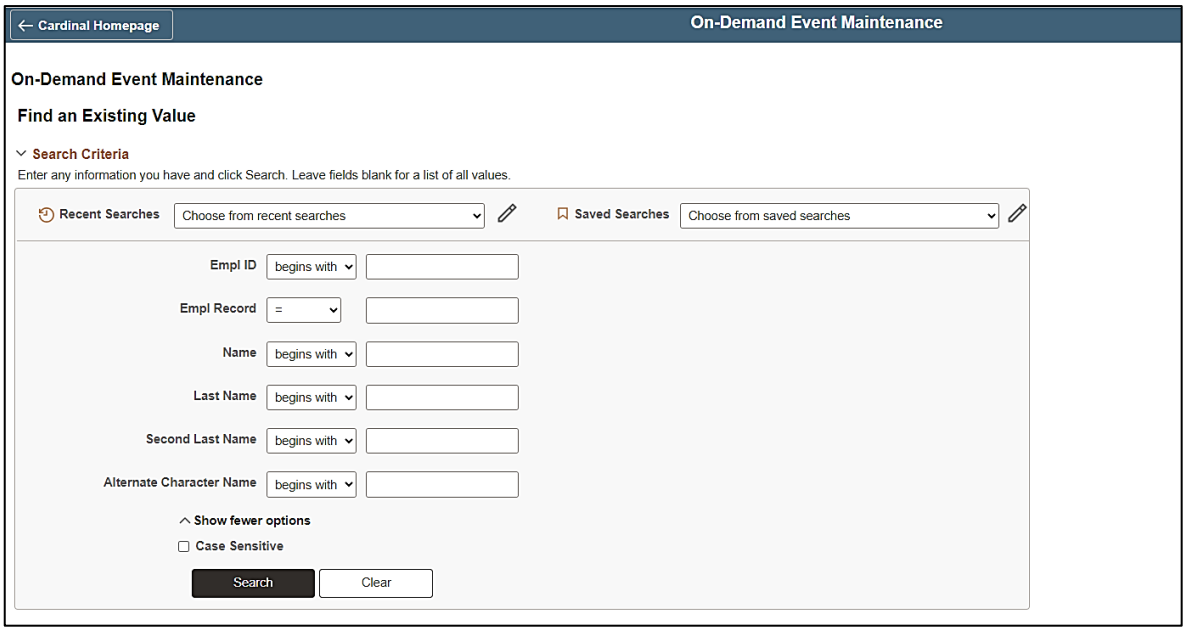
Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACC4	COVA EVH	Family	09/30/2021
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	08/10/1998
403(b)	Waive			Waived	10/01/2021
Section 457	Waive			Waived	10/01/2021
Flex Spending Medical	Waive			Waived	07/01/2023
Flex Spending Dependent Care	Waive			Waived	07/01/2023
Employee Retirement DB	Elect	VRSMDB	VRSMDB	5% of Earnings	09/25/2021
Group Term Life	Elect	GTLR	GTL Reg	0% of Earnings	09/25/2021
Retiree Health Credit	Elect	RTCRDR	RHC Reg	0% of Earnings	09/25/2021
VSDP LTD	Elect	VSDPR	LTD Reg	0% of Earnings	09/25/2021
Flex Spending Admin Fee	Waive			Waived	07/01/2021

Return to Search

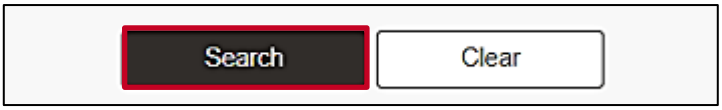
Benefit Enrollment Summary | Benefit Deduction Summary

Step	Action
	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.
	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**

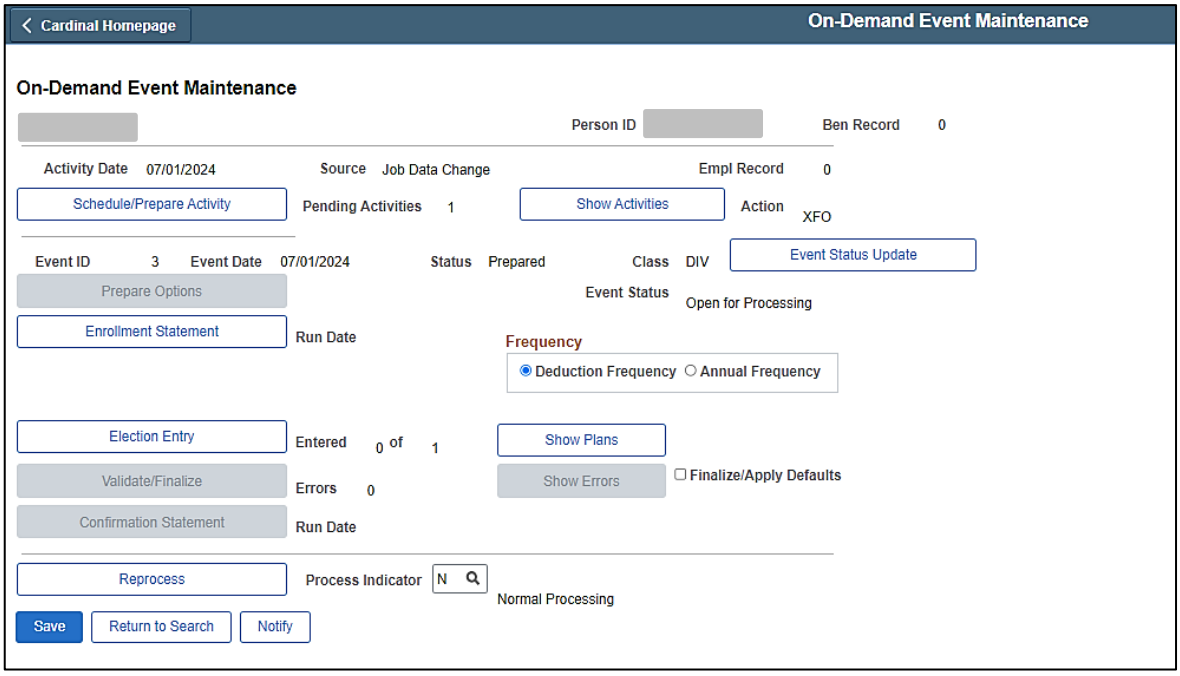
The **On-Demand Event Maintenance Search** page displays.

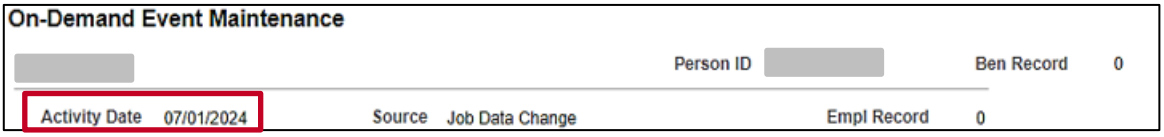
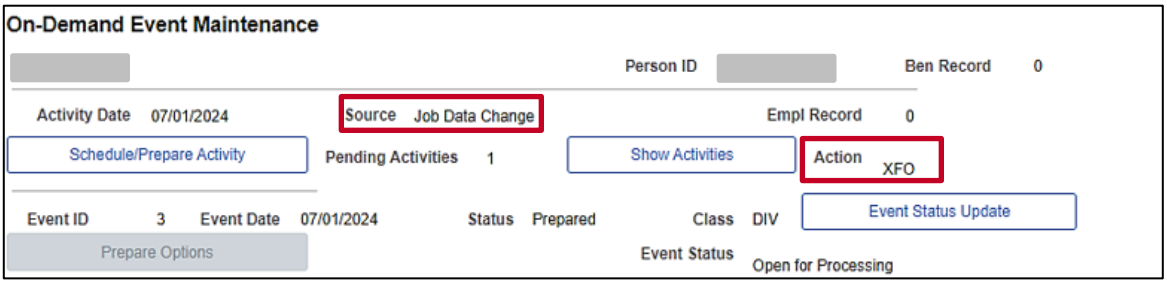


	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages.** This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
5.	Enter the employee’s Employee ID in the **Empl ID** field. **Note**: Searches 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.

Step	Action
6.	Click the **Search** button. 

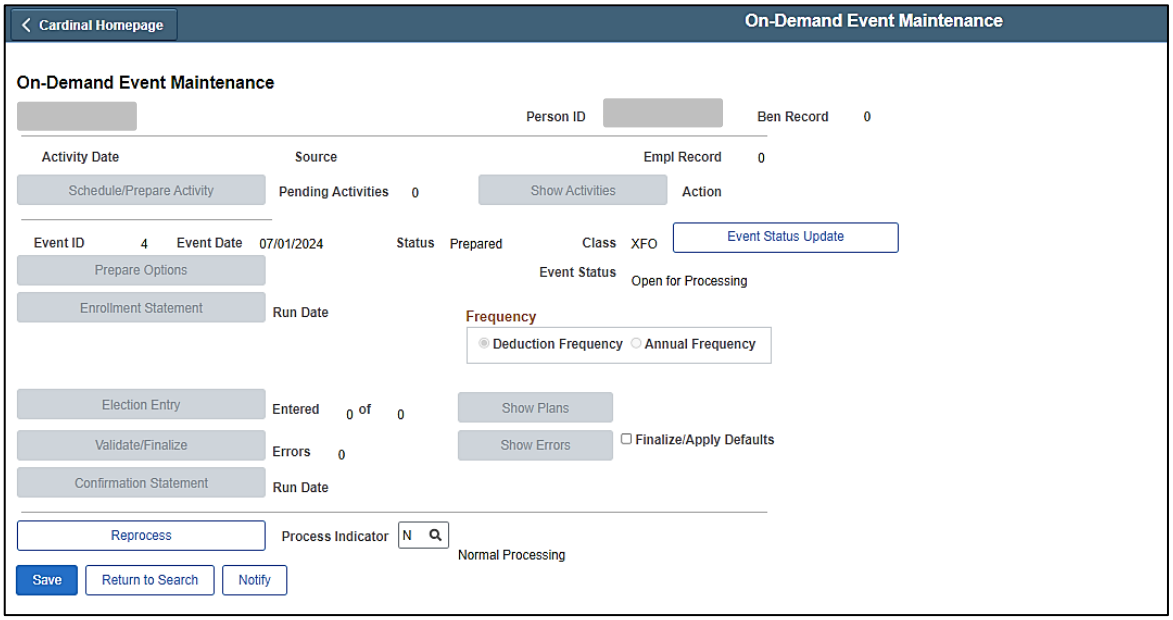
The **On-Demand Event Maintenance** page displays for the applicable employee.



7.	Review the **Activity Date** field. For Transfer Events, this date auto-populates based on the effective date of the Transfer transaction processed by HR. Ensure that this date is accurate. 
	The **Source** field will be “Job Data Change”. The **Action** field will default to “XFO” (Transfer Out). 

Step	Action
8.	Click the **Schedule/Prepare Activity** button.
9.	If the Benefits Administration process has already run, the **Schedule/Prepare Activity** button will be disabled, and the **Pending Activities** field will display a “0”. In this case, proceed to Step 11. If the **Pending Activities** field displays a “1”, click the **Schedule/Prepare Activity** button. **Note**: Clicking the **Schedule/Prepare Activity** button will launch an automated program (Benefits Administration process) that schedules and prepares the activity.
10.	A **Confirmation** message displays in a pop-up window once the automated program completes. Click the **OK** button.

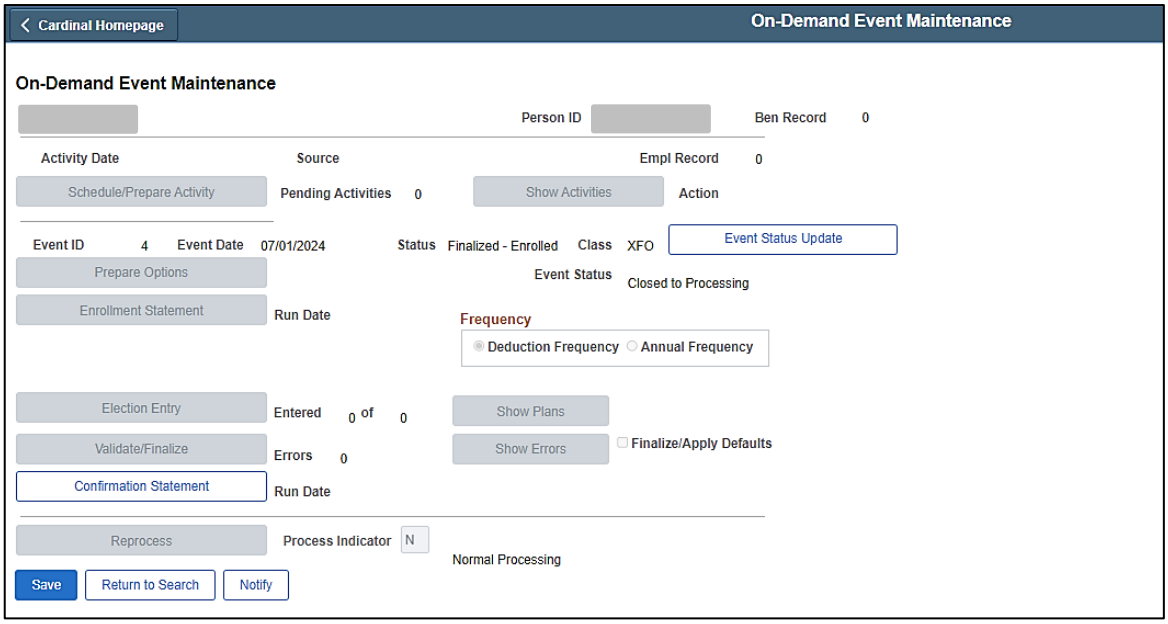
The **On-Demand Event Maintenance** page redisplays.



Step	Action
11.	Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.
	If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.
12.	Click the **Finalize/Apply Defaults** checkbox option.
13.	Click the **Validate/Finalize** button.
14.	A **Confirmation** message displays in a pop-up window once the process completes. Click the **OK** button.

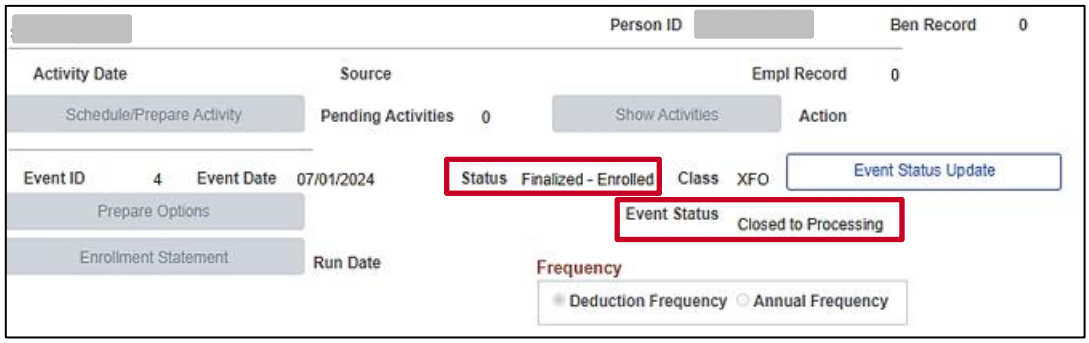
Step	Action

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



The **Status** field will now display as “Finalized-Enrolled”.

The **Event Status** field will still display as “Closed to Processing”.



15. Click the **Save** button.

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. 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

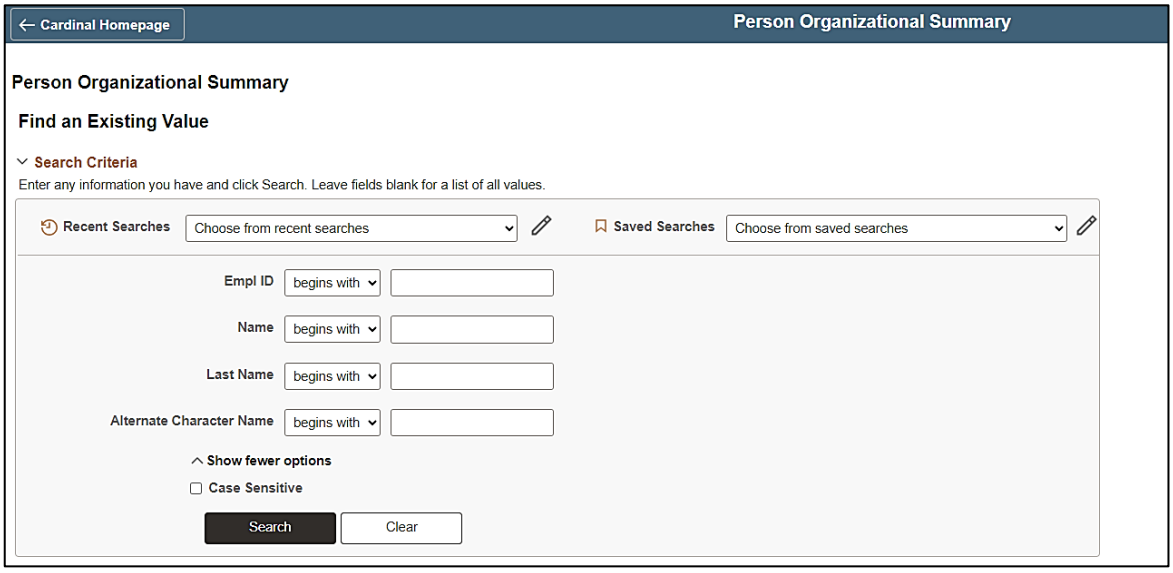
When an Inter-Agency transfer is processed for an employee, their Health, Imputed Life, Premium Rewards, and Flex Spending Plan enrollments are not stopped or changed in any way. All other retirement enrollments are terminated once the Sending Agency processes the “XFO” Benefit Event.

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.

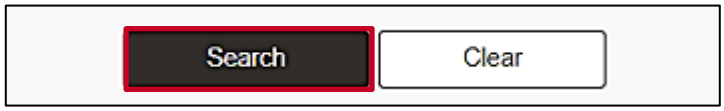
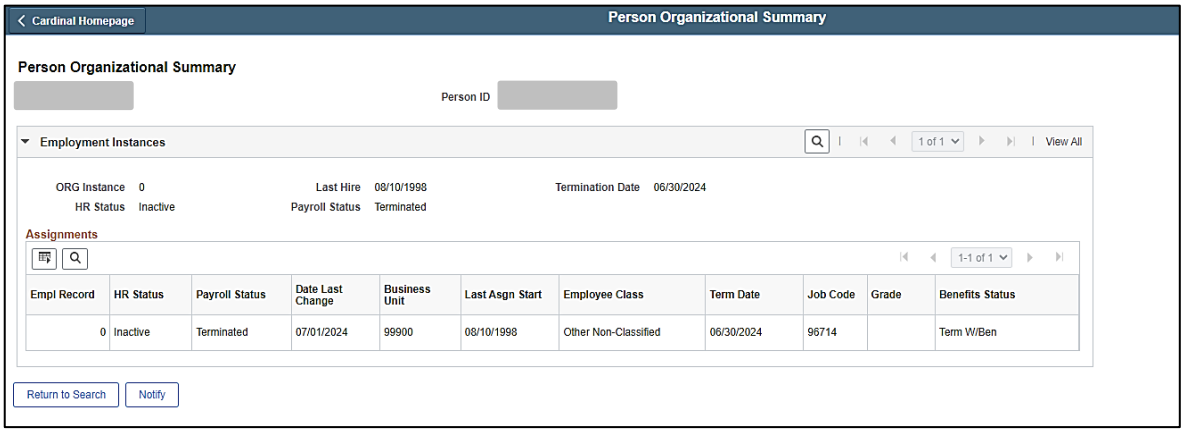
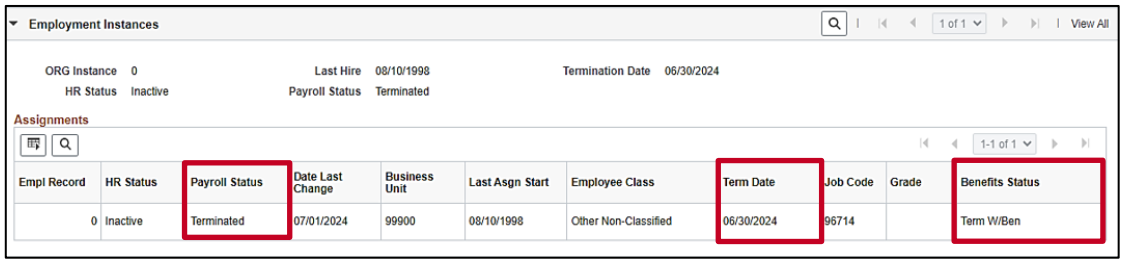
The Receiving Agency HR Administrator cannot process the Transfer In transaction until this is confirmed and the same effective date or the day after must be used for the Transfer In job data transaction to avoid a break in service for the employee.

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.



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**.

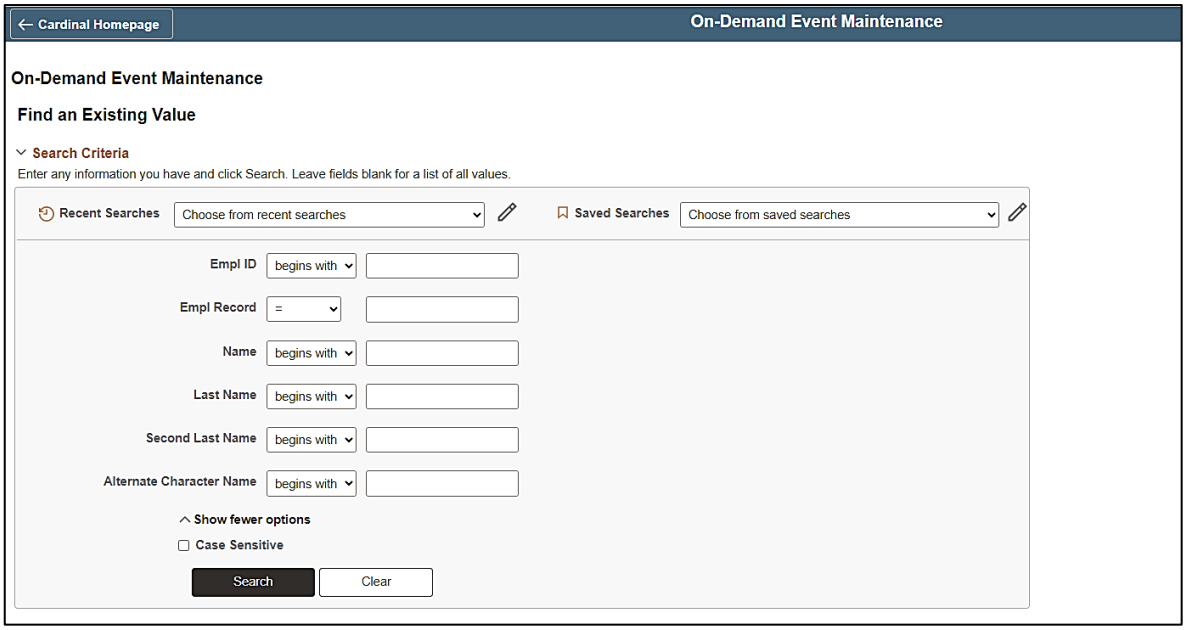
Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.
3.	Click the **Search** button. 
The **Person Organizational Summary** page displays for the applicable employee. 	
4.	Click the **View All** link as needed to see all jobs for the employee (not required in this scenario as there is only one row of job data for the employee).
5.	Verify that the Sending Agency has completed the Transfer Out job data transaction ("Terminated" displays in the **Payroll Status** field and "Term W/Ben" displays in the **Benefit Status** field) and obtain the termination date (date displayed in the **Term Date** field). 	

Step	Action
	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 have not 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 > 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**

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
	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.	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.

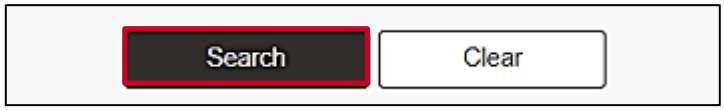


For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

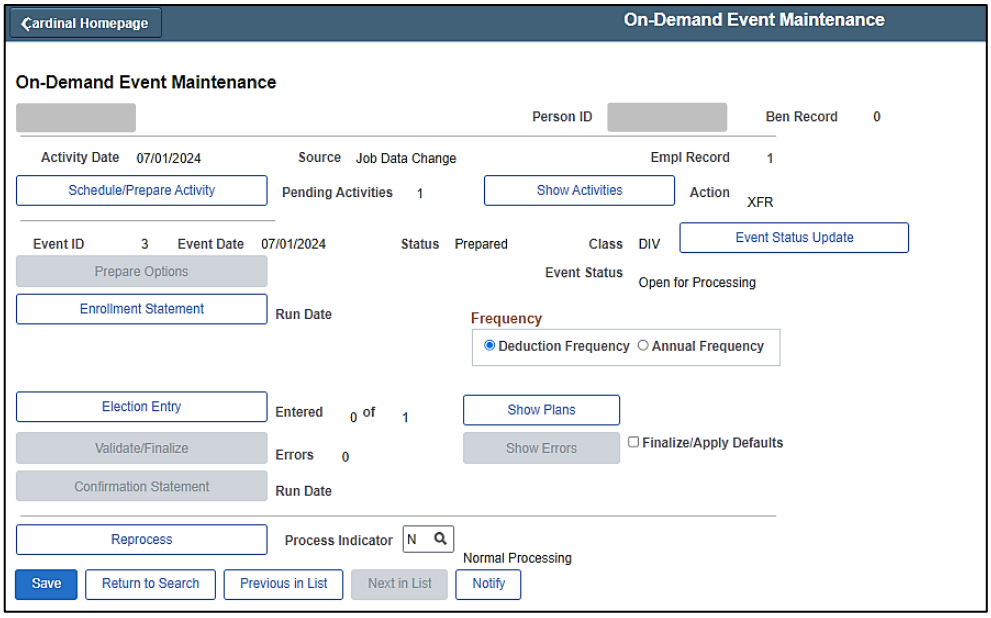
8. Enter the employee's Employee ID in the **Empl ID** field.

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.

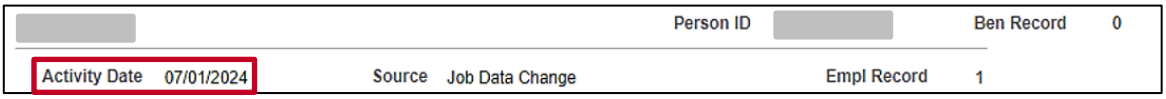
9. Click the **Search** button.



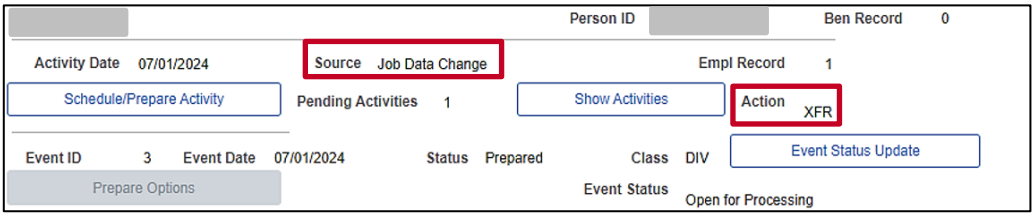
Step	Action
	The **On-Demand Event Maintenance** page displays for the applicable employee.



10.	Review the **Activity Date** field. For Transfer Events, this date auto-populates based on the effective date of the Hire / Transfer In transaction processed by HR. Ensure that this date is accurate.



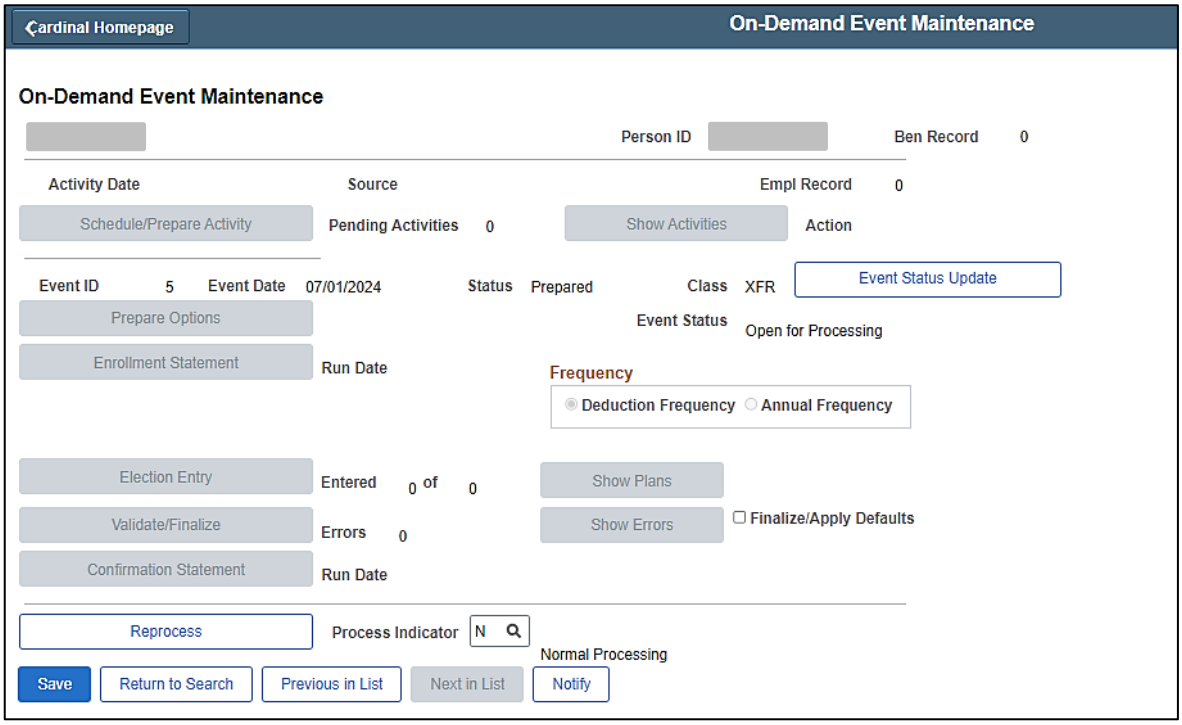
	The **Source** field will be “Job Data Change”. The **Action** field will default to “XFR” (Transfer In).

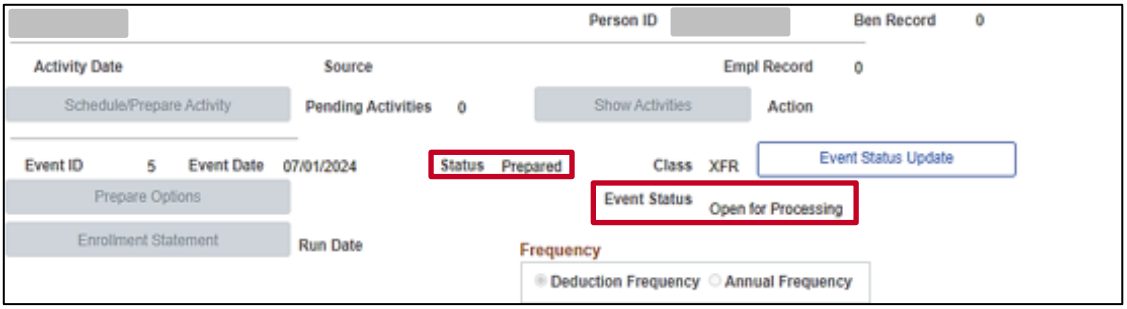


11.	Click the **Schedule/Prepare Activity** button.

Step	Action
12.	If the Benefits Administration process has already run, the **Schedule/Prepare Activity** button will be disabled, and the **Pending Activities** field will display a “0”. In this case, proceed to Step 14. If the **Pending Activities** field displays a “1”, click the **Schedule/Prepare Activity** button. **Note**: Clicking the **Schedule/Prepare Activity** button will launch an automated program (Benefits Administration process) that schedules and prepares the activity.
13.	A **Confirmation** message displays in a pop-up window once the automated program completes. Click the **OK** button.

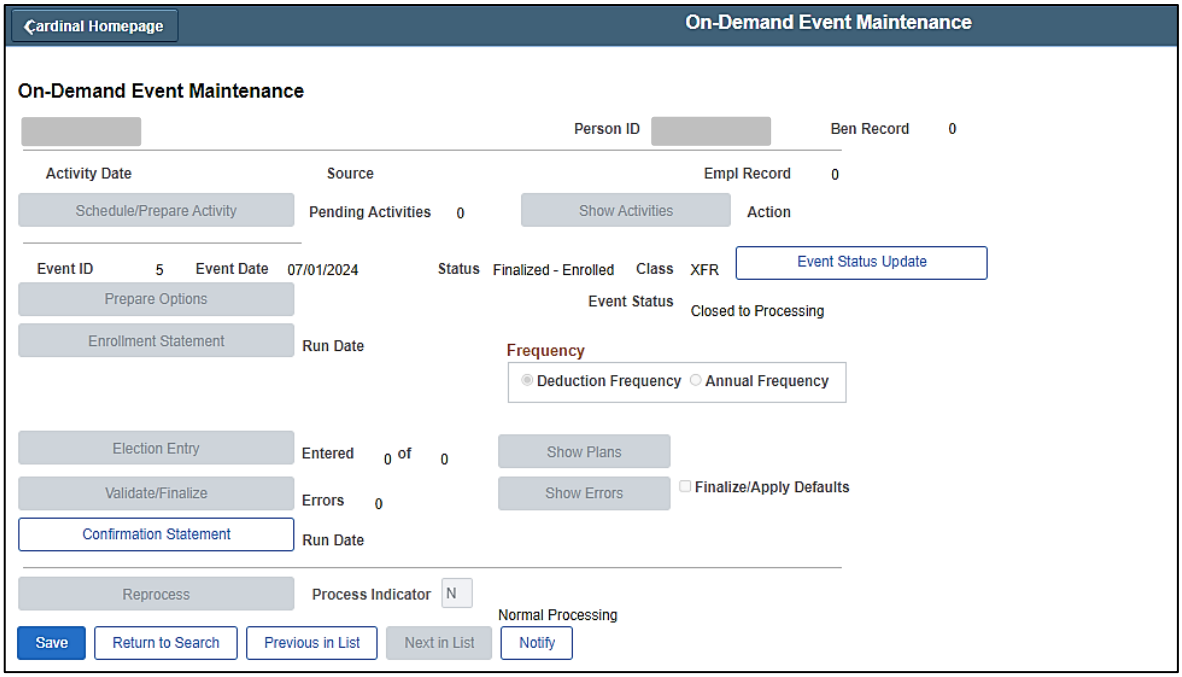
The **On-Demand Event Maintenance** page redisplays.



Step	Action
14.	Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”. 
	If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.
15.	Click the **Finalize/Apply Defaults** checkbox option.
16.	Click the **Validate/Finalize** button.
17.	A **Confirmation** message displays in a pop-up window once the process completes. Click the **OK** button.

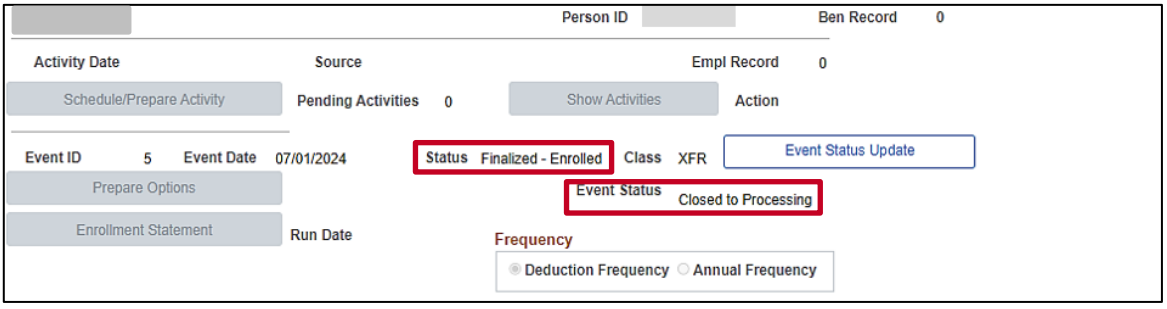
Step	Action

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



The **Status** field will now display as “Finalized-Enrolled”.

The **Event Status** field will still display as “Closed to Processing”.



18. Click the **Save** button.

Step	Action
	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**
	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)