Completing a New Hire Enrollment Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to complete a new hire enrollment on behalf of the employee. This process is performed on the **On-Demand Event Maintenance** page after the employee submits their Benefits Enrollment form to the BA with all the information necessary to complete the process.

Hire (HIR and HR2) Benefit Events are triggered after the HR new hire transactions are completed by an Agency HR Administrator.

The HR2 Benefit Event will automatically enroll the eligible employee in the Imputed Life Insurance Income Plan after the Benefits Administration process runs and then the HR2 Benefit Event will automatically close. The Benefits Administration process runs periodically on a schedule. This must be completed prior to completing the employee's other enrollments via the HIR Benefit Event. If the Agency BA needs to process the HIR Benefit Event before the Benefits Administration process has run, the HR2 Benefit Event can be manually closed. This Job Aid contains the steps used to manually close the HR2 Benefit Event.

Navigation Note: Please note that you may see 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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1. Access the **On-Demand Event Maintenance** page using the following navigation path:

   Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

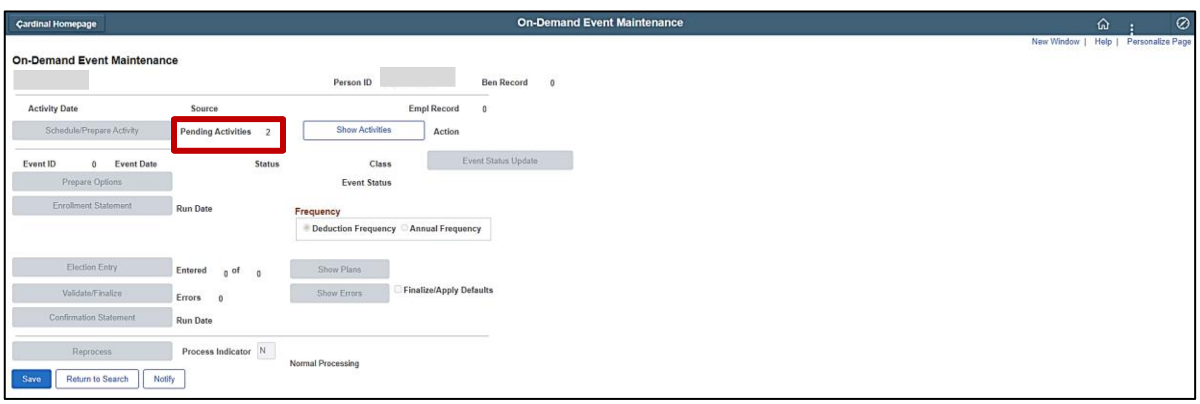
The **On-Demand Event Maintenance Search** page displays.

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.

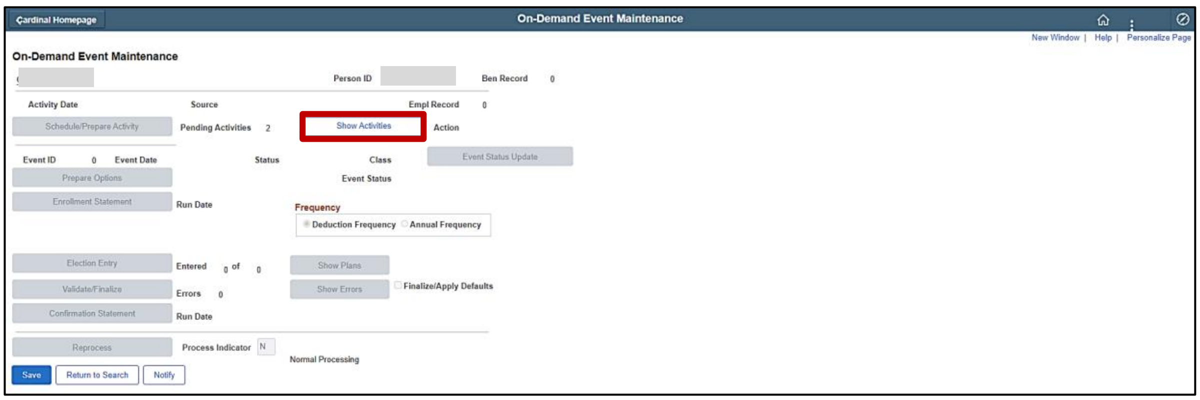
3. Click the **Search** button.

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



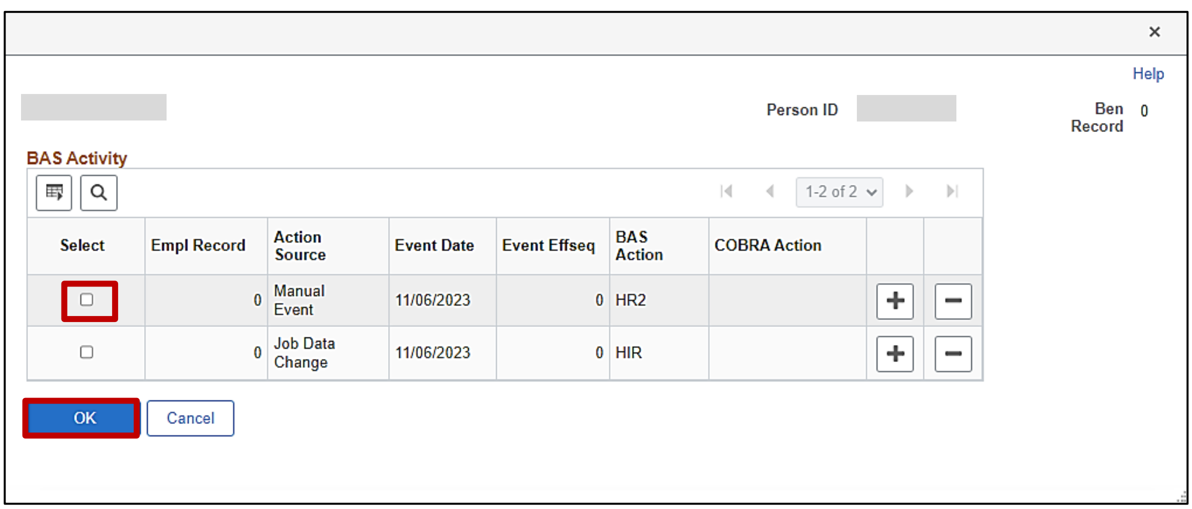
4. Review the **Pending Activities** field and proceed based on the following:

    - If the **Pending Activities** field displays a “2”, the Benefits Administration process has not run and the HR2 Benefit Event has not been automatically processed and closed. Proceed with Step 5
    - If the **Pending Activities** field displays a “1”, the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed but the “HIR” Benefit Event has not been prepared. Proceed with Step 11
    - If the **Pending Activities** field displays a “0”, the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed. Additionally, the “HIR” Benefit Event has been prepared. Proceed with Step 14



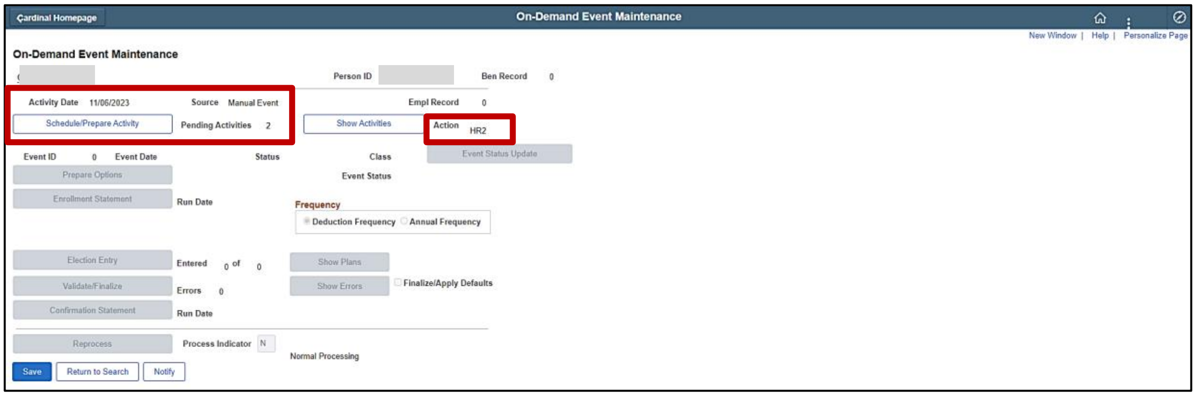
5. Click the **Show Activities** button.

The **BAS Activity** page displays in a pop-up window.



6. Click the **Select** checkbox option for the HR2 Benefit Event.
7. Click the **OK** button.

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



8. Review the **Activity Date** field. This is the date of the employee's New Hire transaction completed by HR. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with your Agency HR to correct prior to processing the new hire benefits enrollment.

   Note: For HR2 Benefit Events, the **Source** field will be "Manual Event" and the **Action** field will be "HR2".

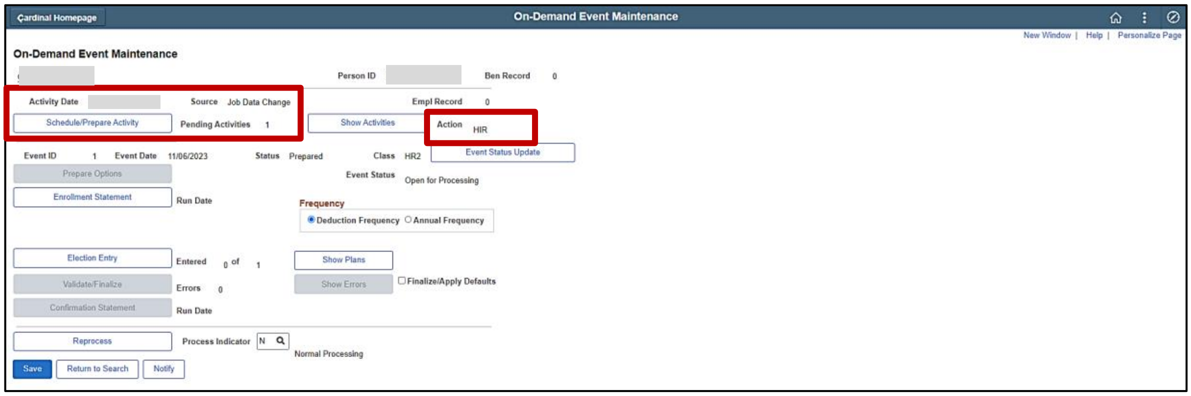
9. Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event.

   Note: This will process and close the HR2 Benefit Event.

A **Confirmation** message displays in a pop-up window once the automated program completes.

10. Click the **OK** button.

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



11. Review the **Activity Date** field. This is the date of the employee's New Hire transaction completed by HR. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with your Agency HR to correct prior to processing the new hire benefits enrollment.

    Note: For HIR Benefit Events, the **Source** field will be "Job Data Change" and the **Action** field will be "HIR".

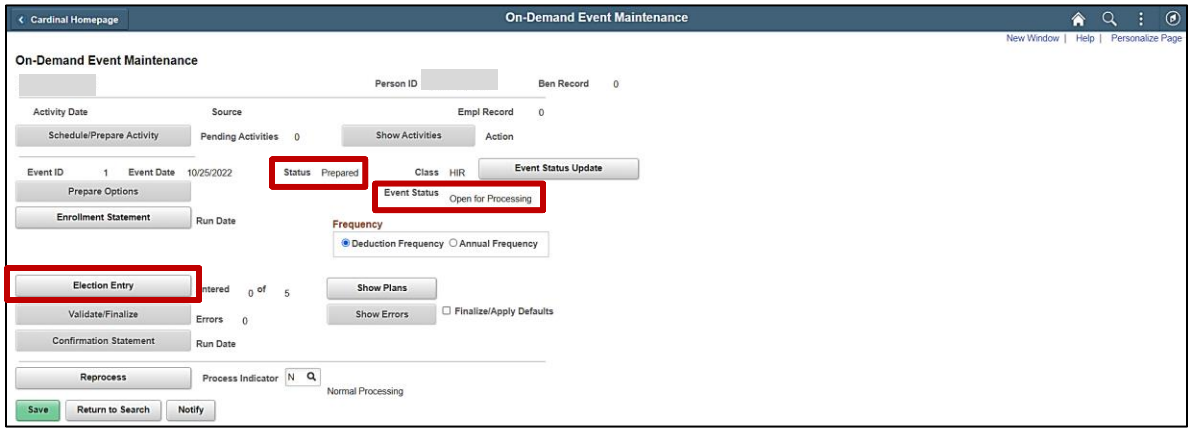
12. Click the **Schedule/Prepare Activity** button.

    Note: Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

A **Confirmation** message displays in a pop-up window once the automated program completes.

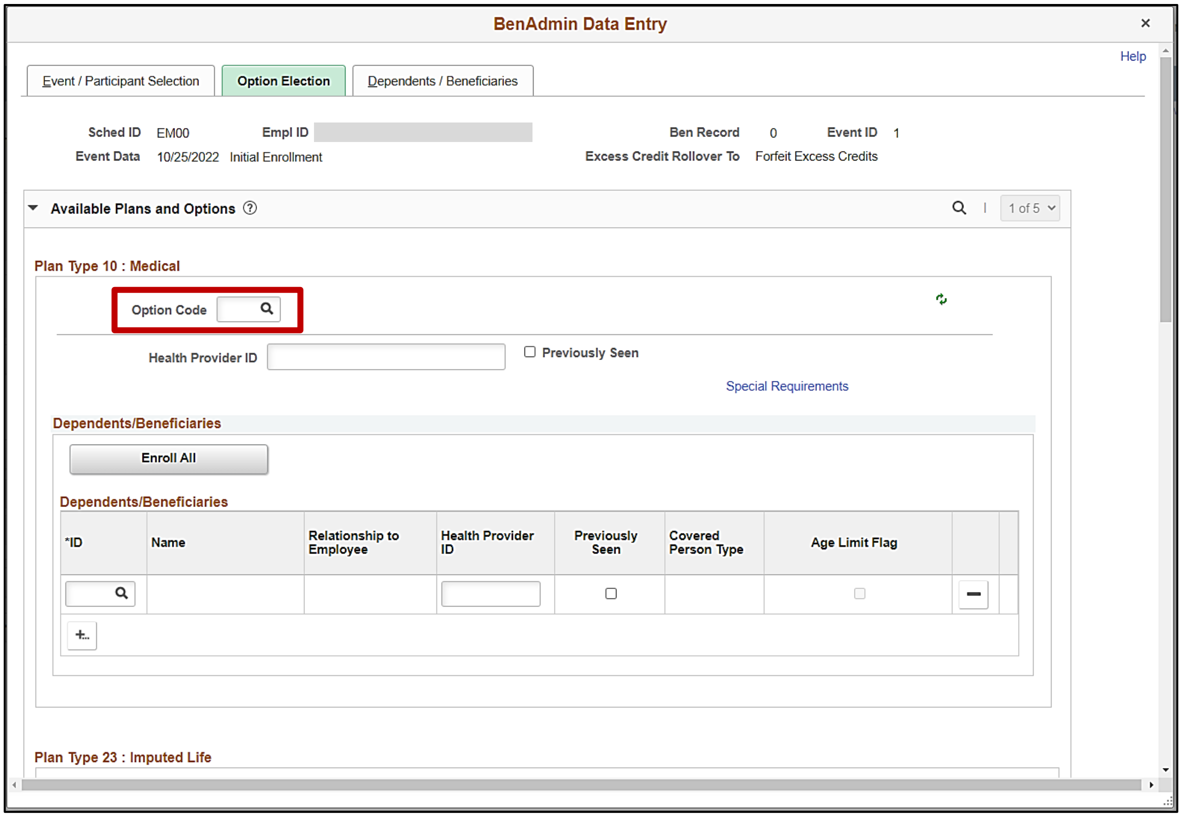
13. Click the **OK** button.

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



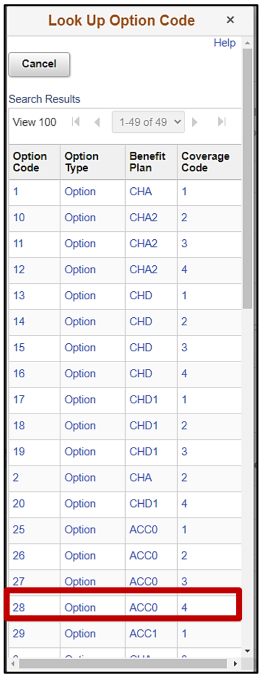
14. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.
15. Click the **Election Entry** button.

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.



16. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section.

The **Look Up Option Code** page displays in a pop-up window.

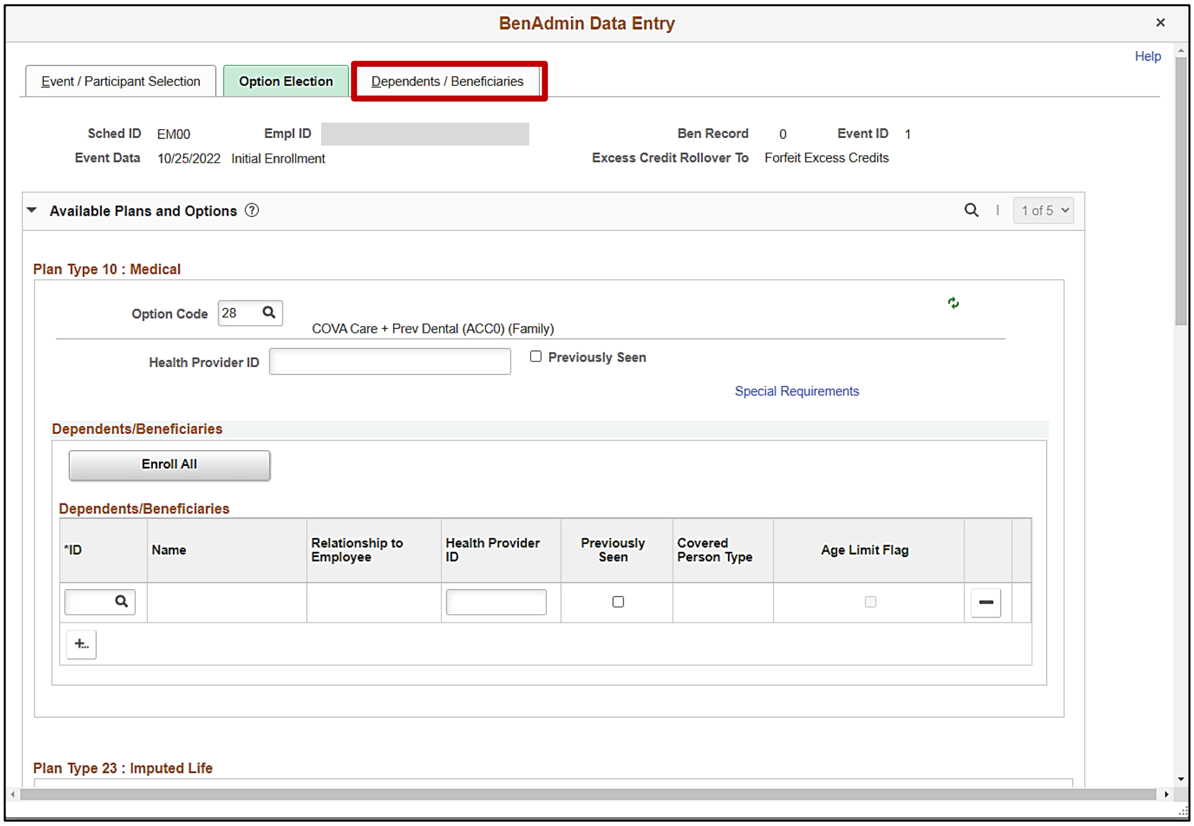


Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1
18	Option	CHD1	2
19	Option	CHD1	3
2	Option	CHA	2
20	Option	CHD1	4
25	Option	ACC0	1
26	Option	ACC0	2
27	Option	ACC0	3
28	Option	ACC0	4
29	Option	ACC1	1

17. Select the applicable Benefit Plan and Coverage Code (based on the employee's Benefits Enrollment form) by clicking the corresponding link in the **Option Code** column (Benefit Plan "ACC0" with Coverage Code "4" will be selected in this example).

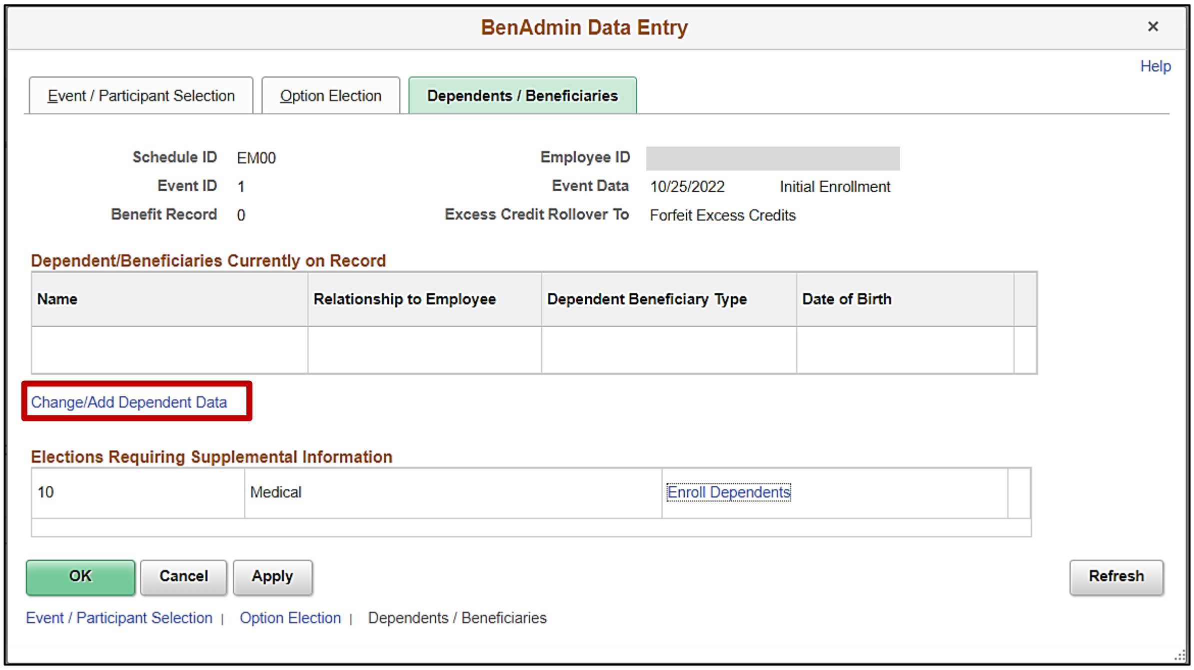
    Note: The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child, and 4 – Employee + 2 or More Dependents (Family).

The **Option Election** tab redisplays.



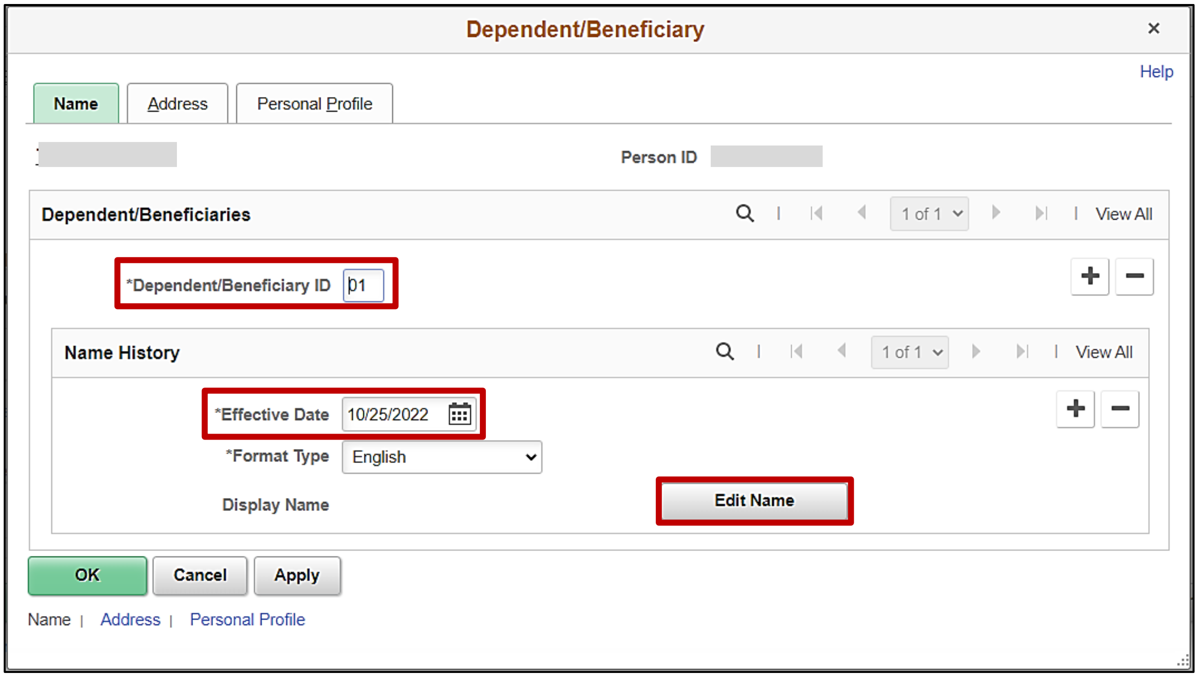
18. If the employee is single and elected a Benefit Plan with a Coverage Code of “1”, skip to Step 43. If the employee selected a Benefit Plan with any other Coverage Code, you must now add the employee’s dependent(s). Proceed with Step 19.
19. Click the **Dependents / Beneficiaries** tab.

The **Dependent / Beneficiaries** tab displays.



20. Click the **Change/Add Dependent Data** link.

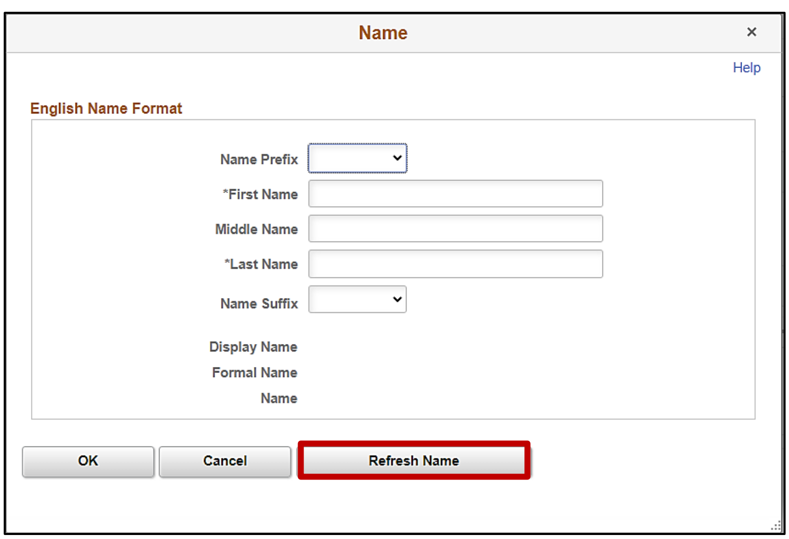
The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.



Note: The **Effective Date** field defaults to the Event Date (employee's hire date for new hire enrollments). This date must be on or before the new hire event date and should not be updated. The **Dependent/Beneficiary ID** field will default to "01" for the first dependent and increment by 1 for each additional dependent subsequently added.

21. Click the **Edit Name** button.

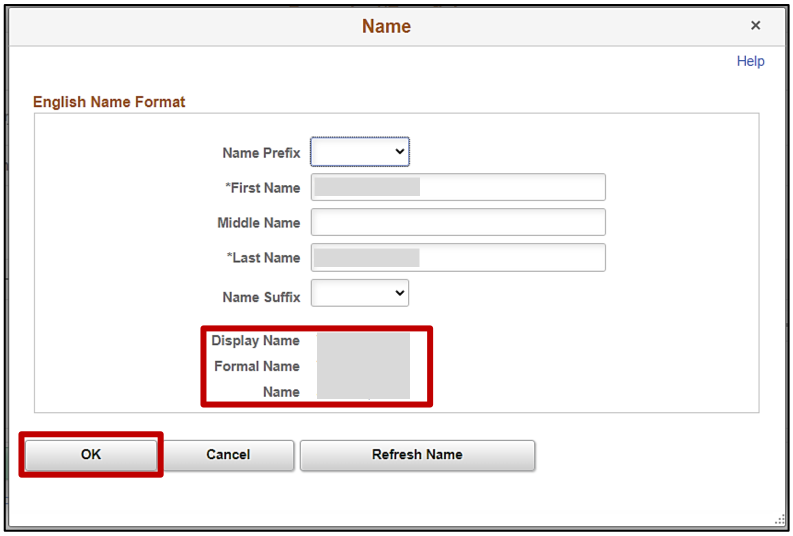
The **Name** page displays in a pop-up window.



22. At a minimum, enter the dependent's first and last name in the corresponding fields. The **Name Prefix**, **Middle Name**, and **Name Suffix** fields are optional but should be entered as applicable.

23. Click the **Refresh Name** button.

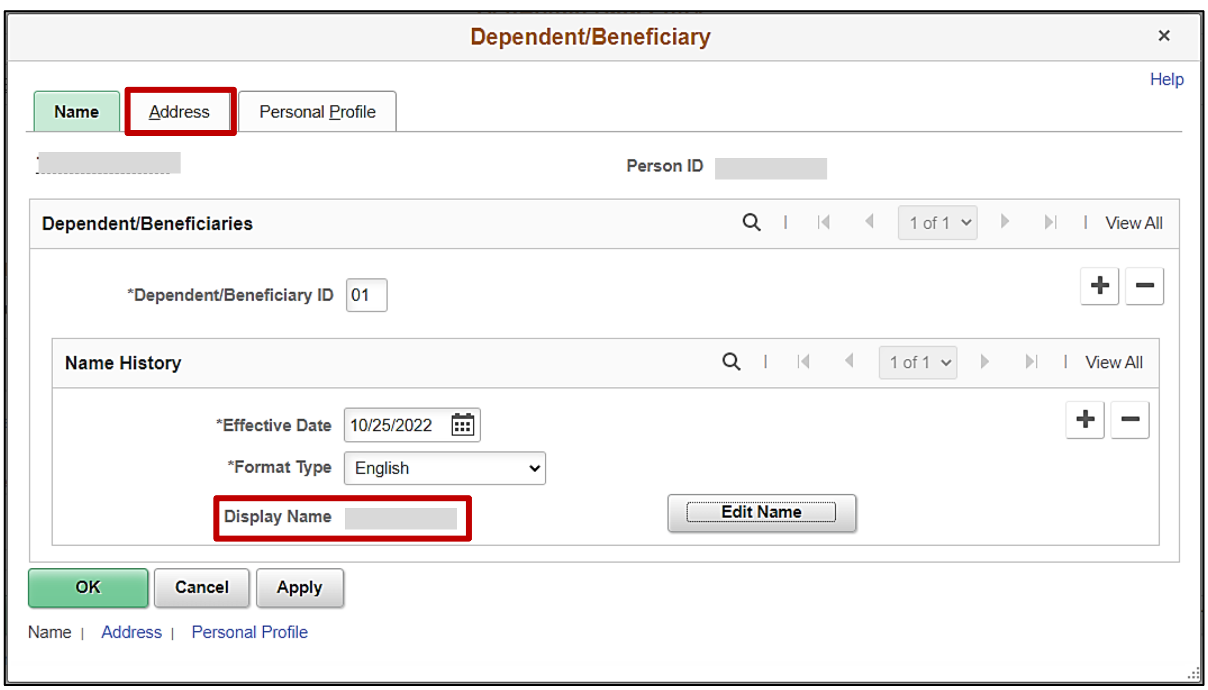
The **Name** page refreshes.



Note: The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.

24. Click the **OK** button.

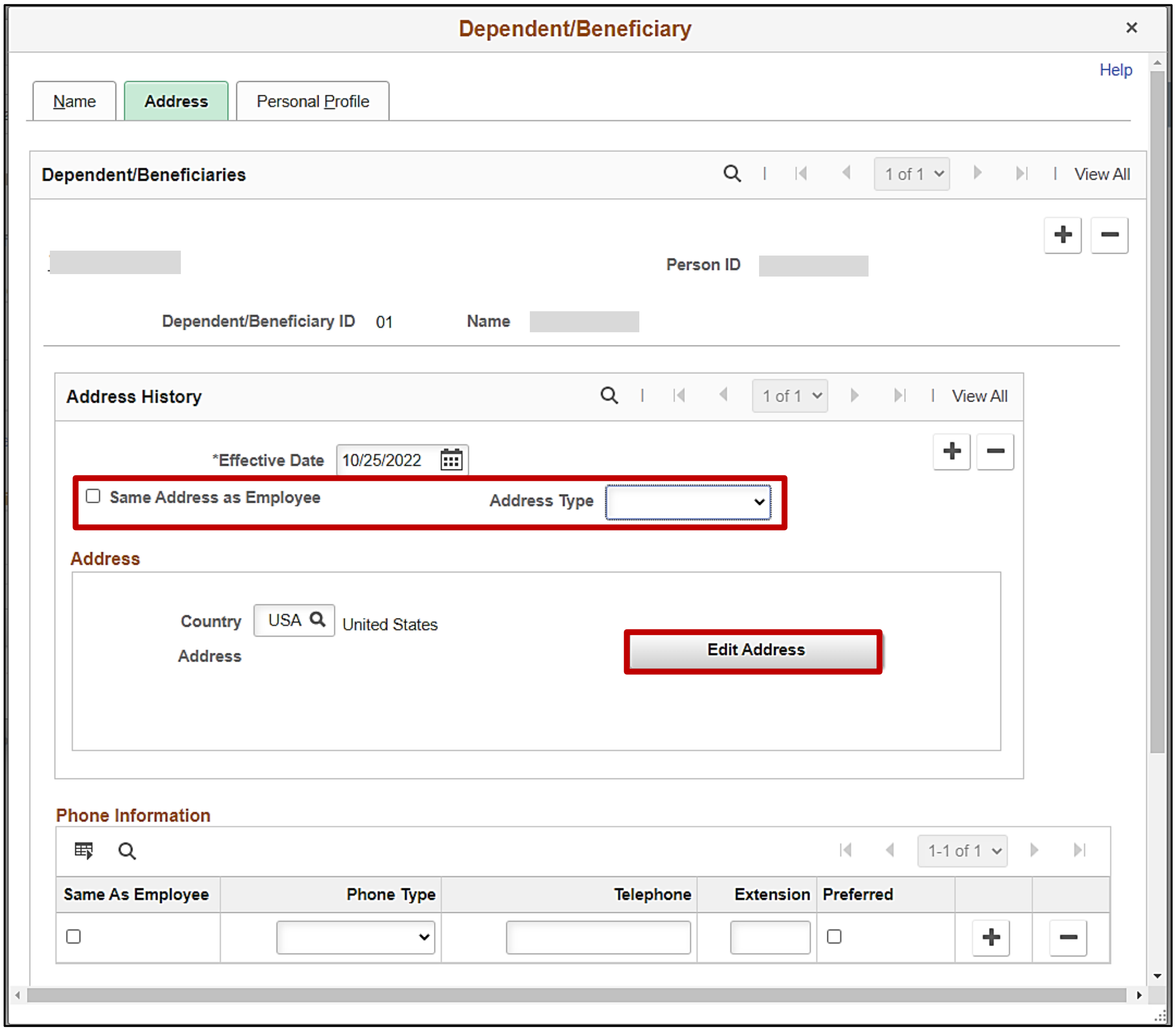
The **Name** tab redisplays.



Note: The **Display Name** field auto-populates with the name information previously entered.

25. Click the **Address** tab.

The **Address** tab displays.



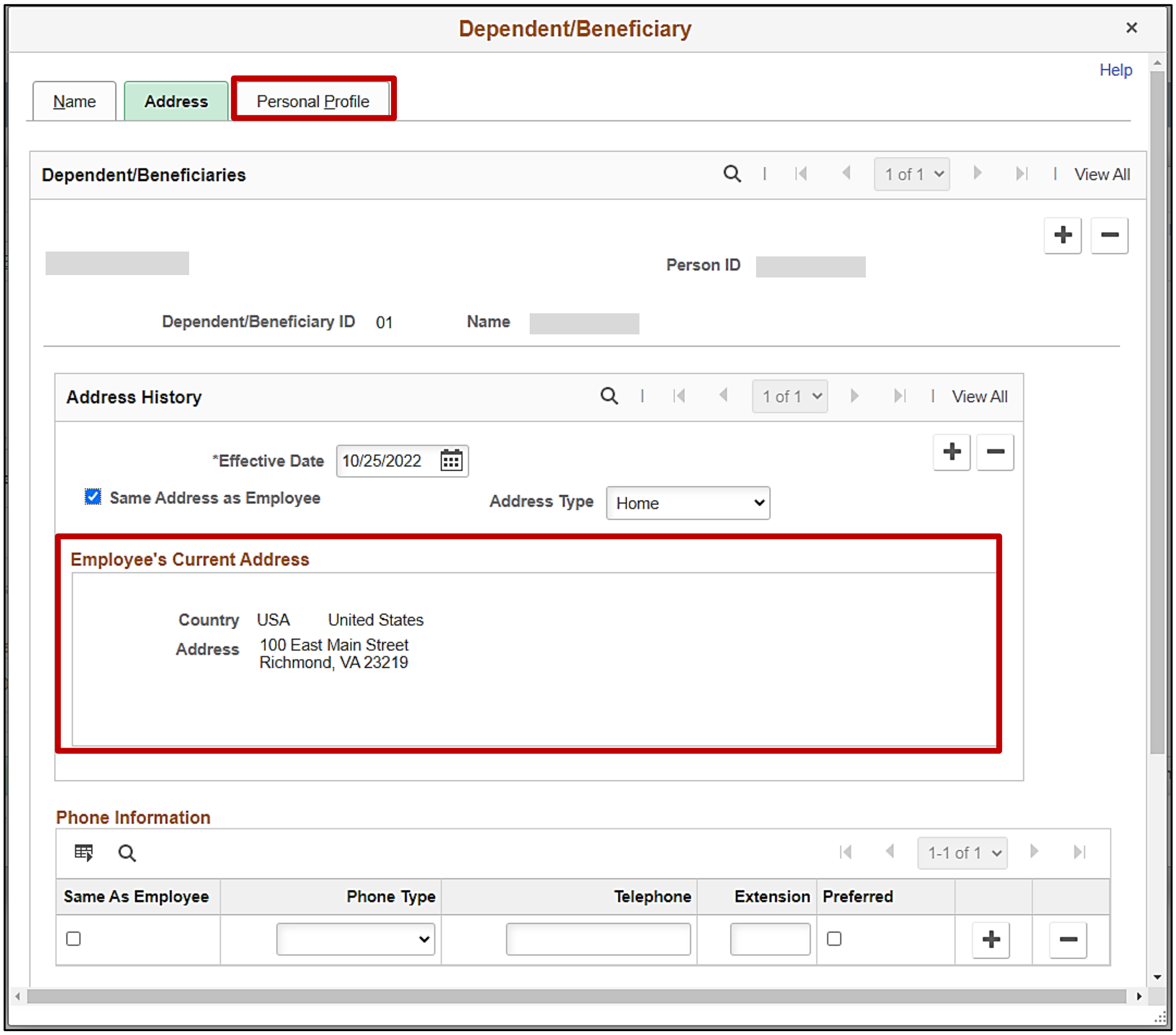
26. Complete the address information as applicable for the dependent by either:

- Clicking the **Same Address as Employee** checkbox option (applicable for this example)

  or

- Selecting the applicable **Address Type** using the dropdown button provided and then clicking the **Edit Address** button (the **Edit Address** page will display in a pop-up window and the applicable address information can be entered)

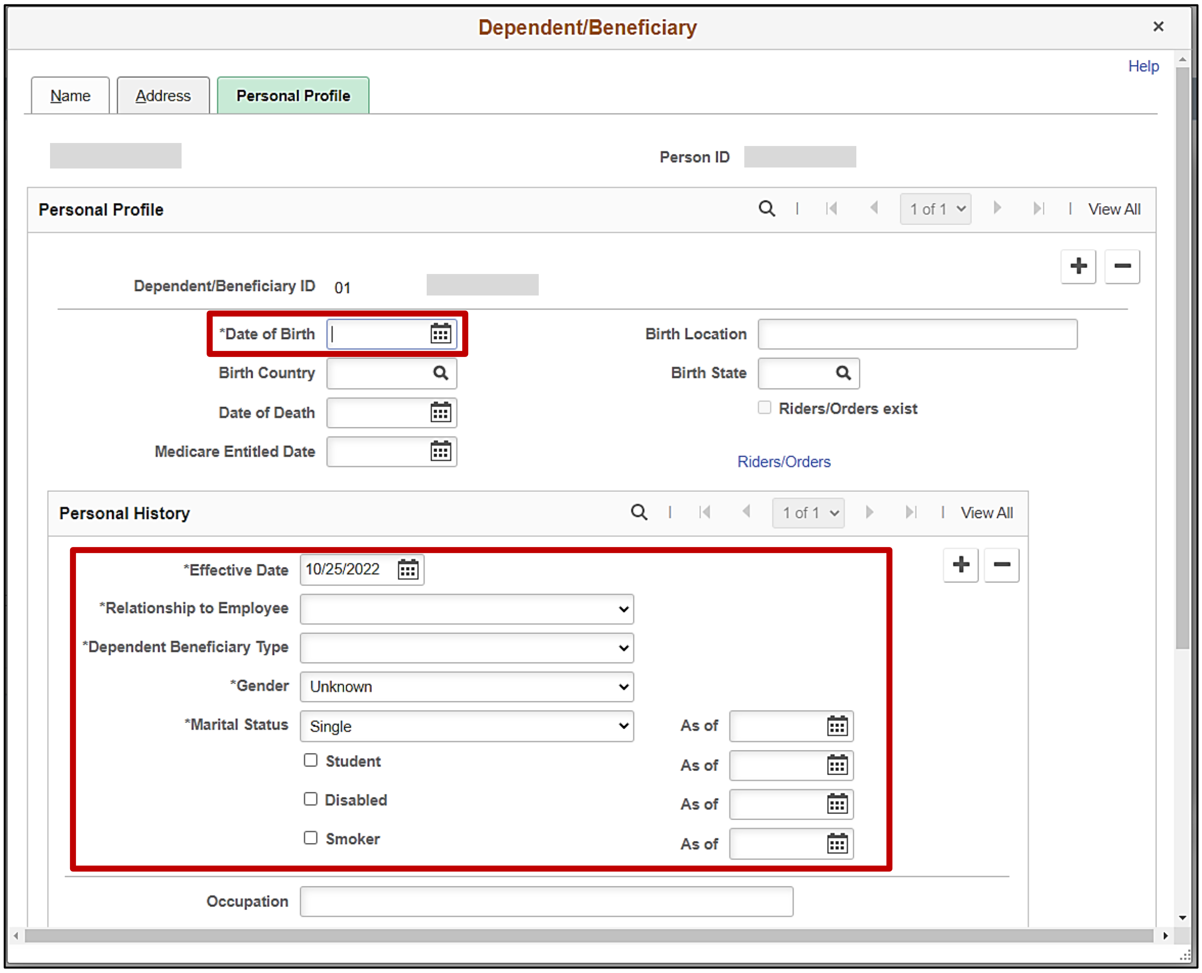
The **Address** tab refreshes.



Note: The address information auto-populates in the **Employee's Current Address** section.

27. Click the **Personal Profile** tab.

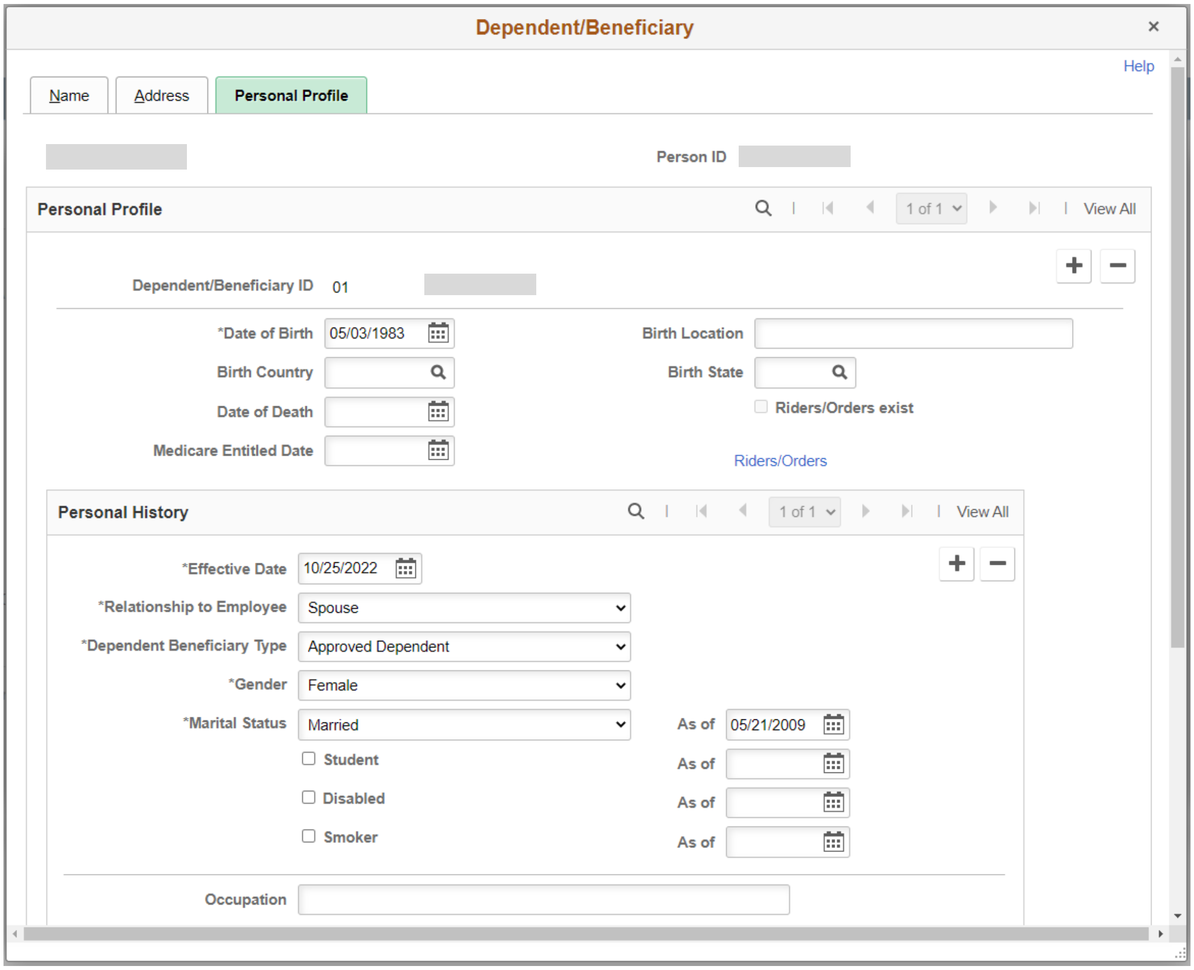
The **Personal Profile** tab displays.



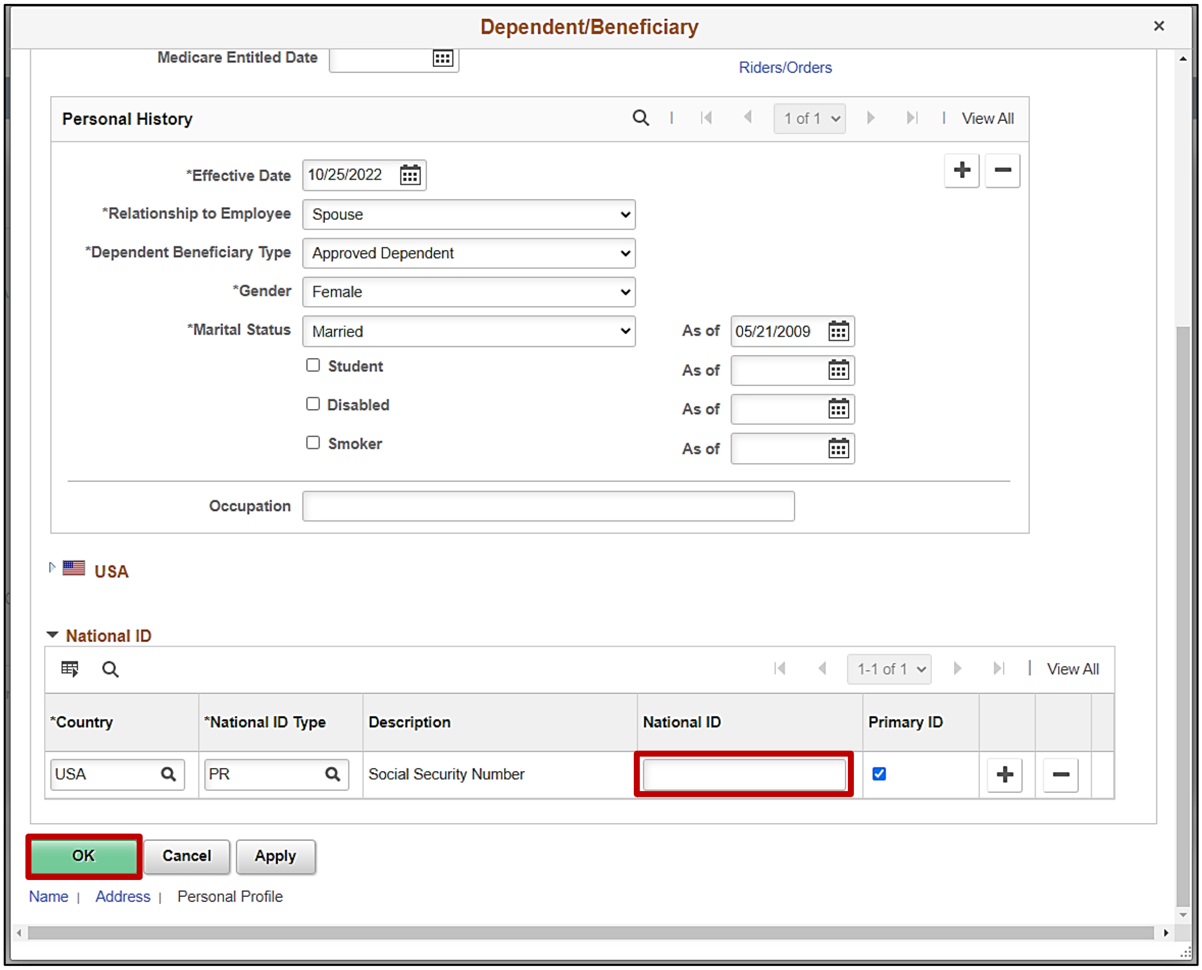
Note: The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor).

28. Click the **Date of Birth Calendar** icon and select the dependent's date of birth.
29. Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee.
30. Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent".
31. Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female").
32. The **Marital Status** field defaults to "Single". Updated as needed for the dependent.

    Note: If any status other than "Single" is selected, select the applicable date using the **Marital Status As of Calendar** icon.



33. Click the vertical scrollbar to scroll down on the page to the **National ID** section.

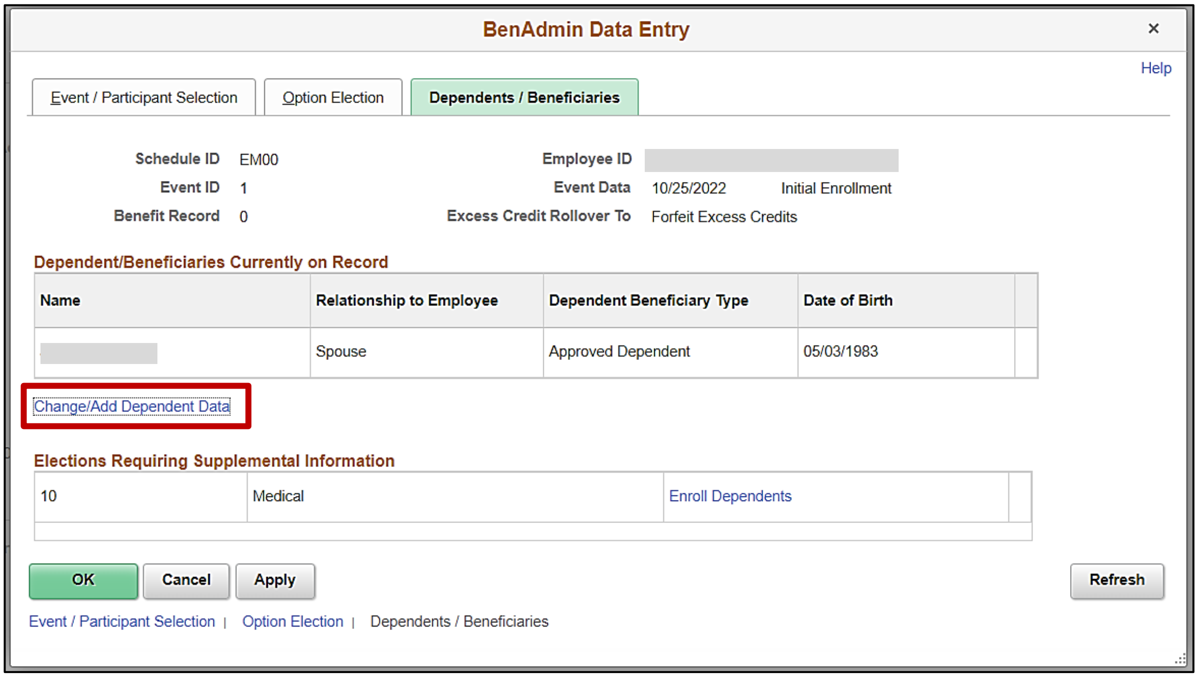


34. Enter the dependent's Social Security Number (SSN) in the **National ID** field.

    Note: If the employee did not provide the dependent's SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the **Base Benefits Consistency Audit** report to monitor dependents with a missing SSN.

35. Click the **OK** button.

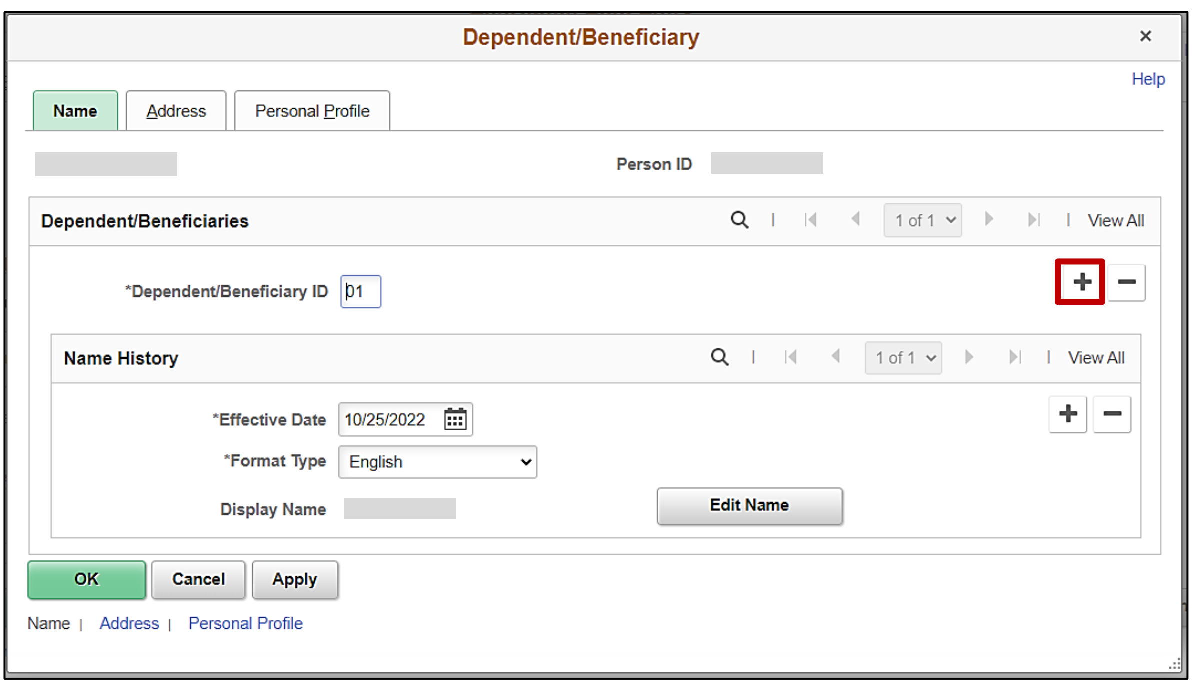
The **Dependents / Beneficiaries** tab redisplays.



Note: If additional dependents need to be added, continue with Step 36. If no additional dependents need to be added, skip to Step 43.

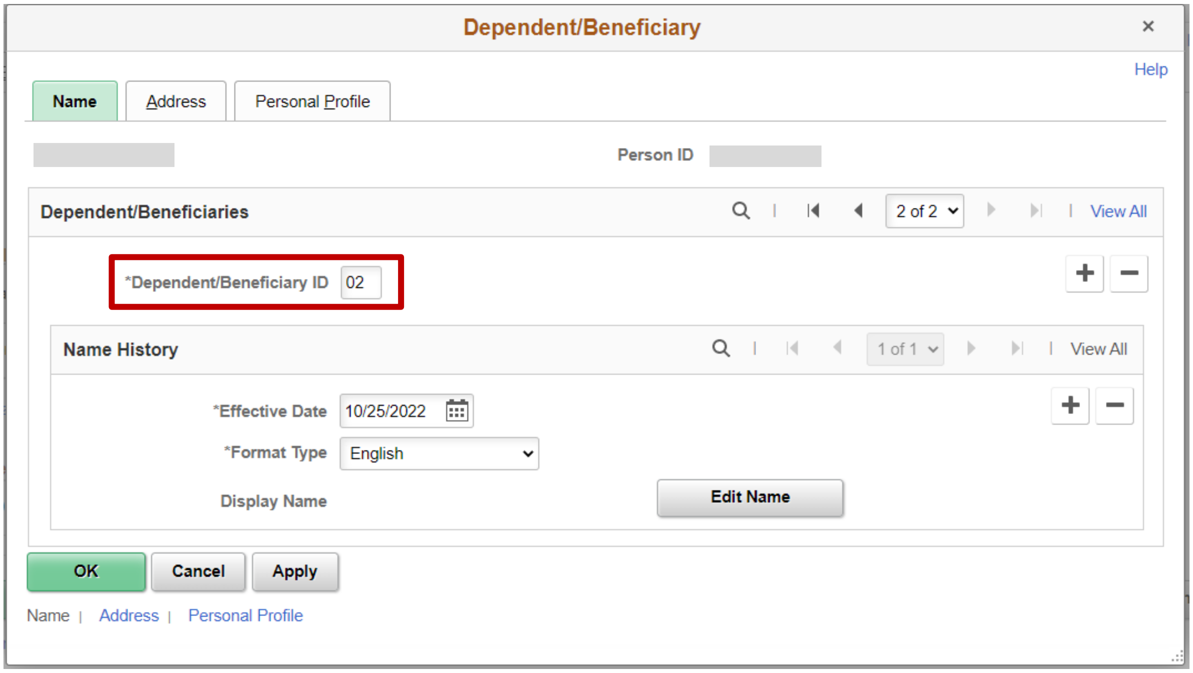
36. Click the **Change/Add Dependent Data** link.

The **Name** tab redisplays.

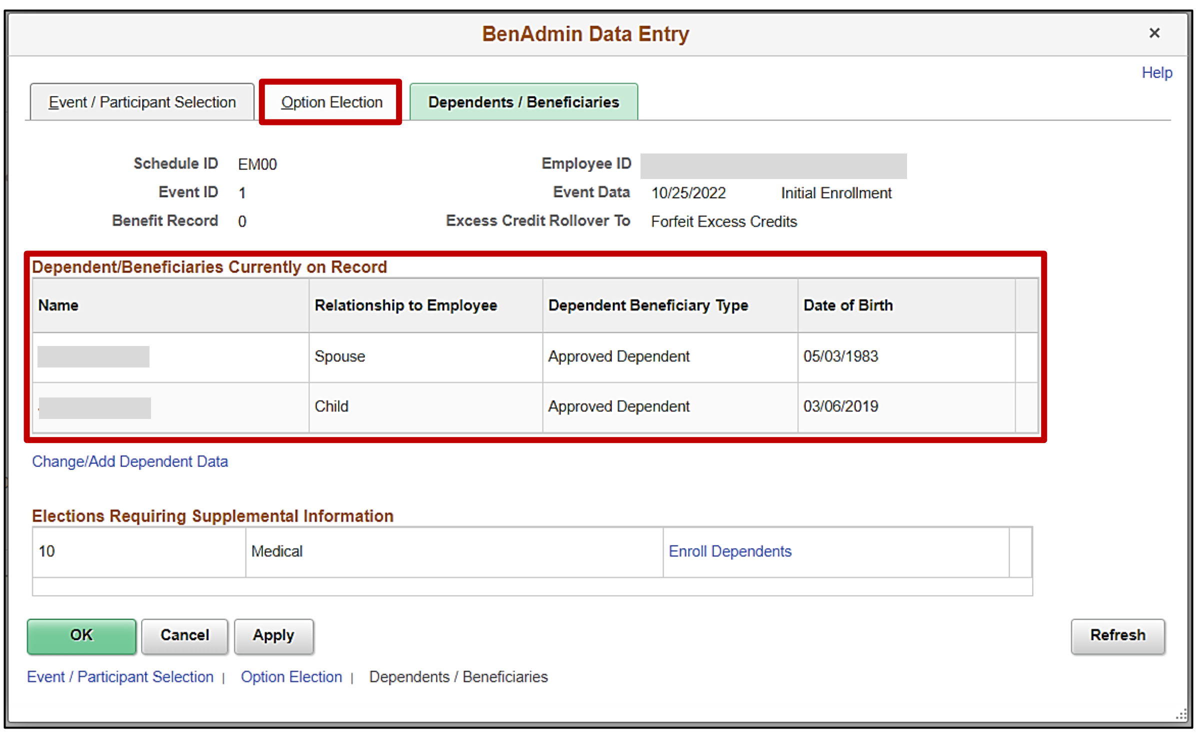


37. Click the **Add a New Row** icon (**+**) within the **Dependent/Beneficiaries** section.

The page refreshes with a new row.



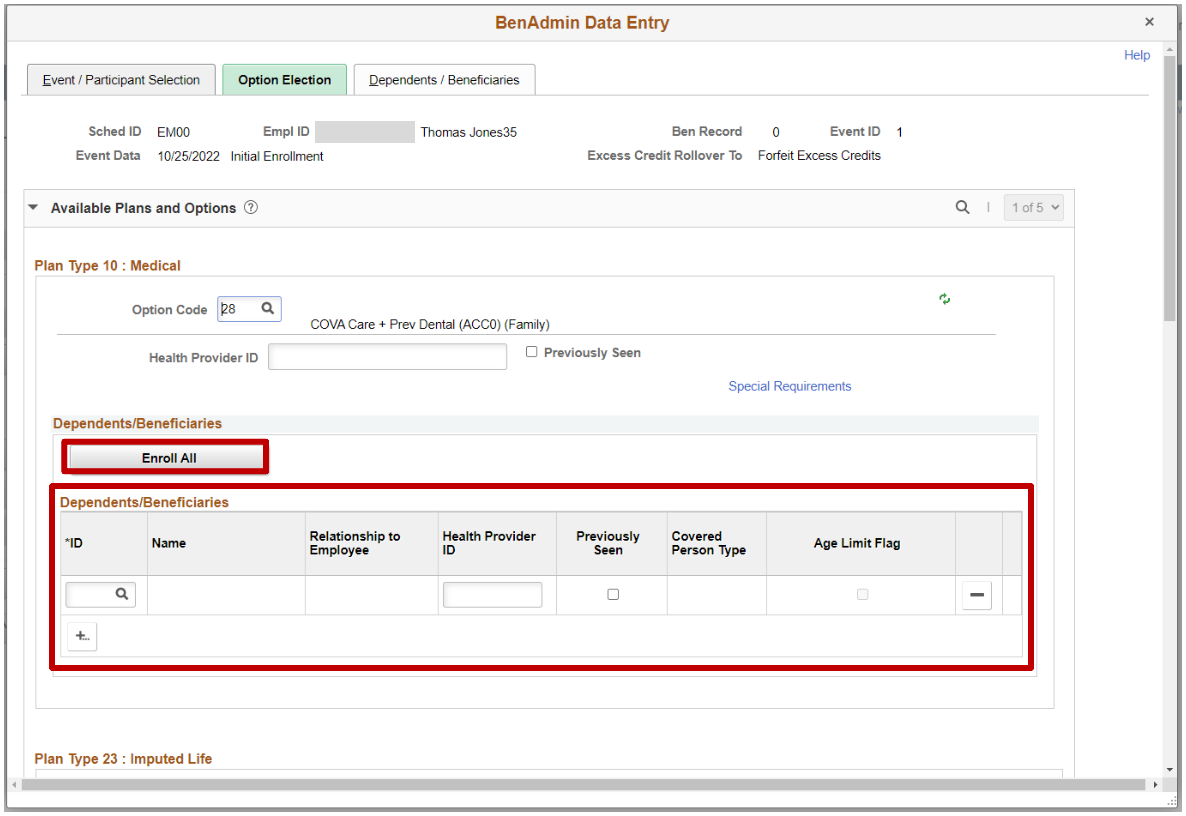
38. The **Dependent/Beneficiary ID** field increments by “1” (“02” in this example as this is the second dependent being added). Repeat Steps 21 – 35 to complete the data entry for the next dependent and then repeat as needed until all dependents have been added.



Note: All dependents that have been added display in the **Dependent/Beneficiaries Currently on Record** section.

39. Click the **Option Election** tab.

The **Option Election** tab redisplays.



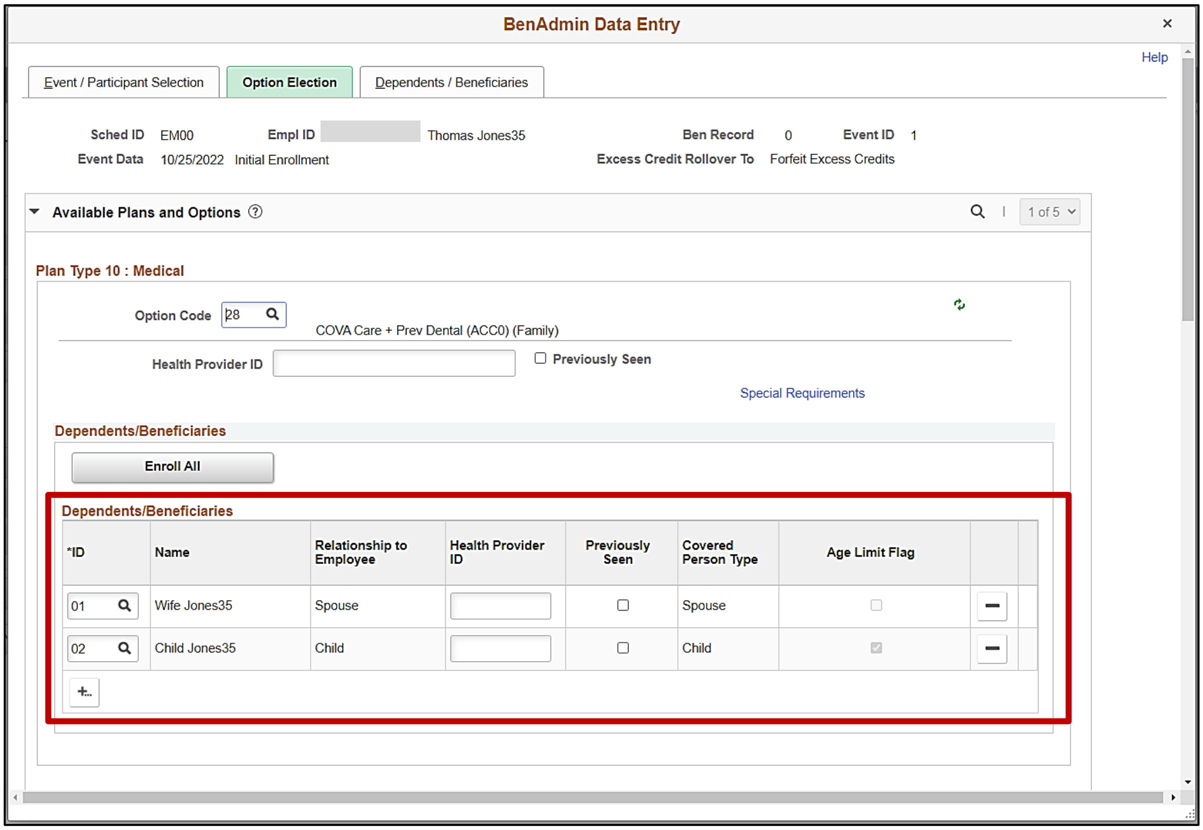
40. Next, enroll the dependents in the previously selected Medical Plan by either:

- Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example)

  or

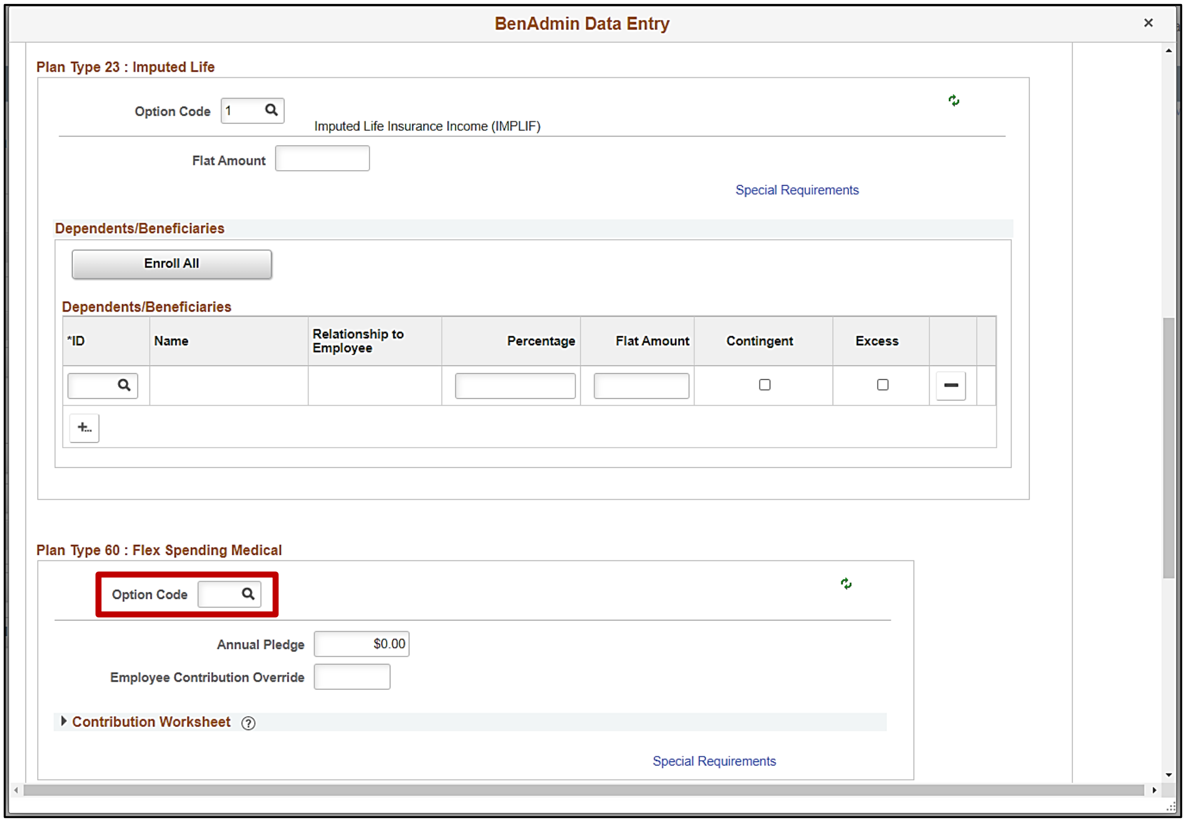
- Adding the applicable dependents individually using the **ID Look Up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (**+...**)

The page refreshes.



41. The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.

42. Click the vertical scrollbar to scroll down on the page.

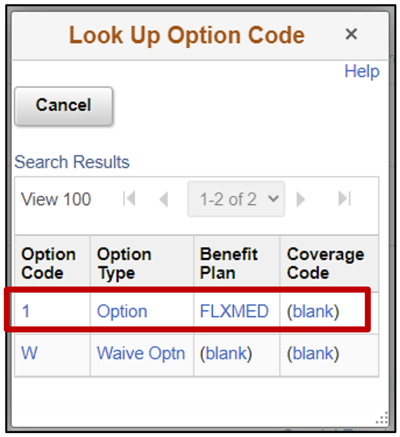


43. Skip the **Imputed Life** section. The eligible employee was automatically enrolled in the Imputed Life Insurance Income Plan when the HR2 Benefit Event was processed. The remaining sections available for the employee on the **Option Election** tab are based on the employee's benefits eligibility. Cardinal has embedded configurations based on the Commonwealth's Program rules. The specific elections made are based on the employee's Benefit Enrollment form. This Job Aid provides the steps used to elect a Flex Spending Medical Plan, waive the Flex Spending Dependent Care plan, and elect the Flex Spending Admin Fee. If the employee is not electing any additional plans, skip to Step 51.

Next, complete the **Plan Type 60: Flex Spending Medical** section. If Steps 44 - 46 are not completed, the system will automatically waive the Flex Spending Medical plan for the employee as this is not a required plan.

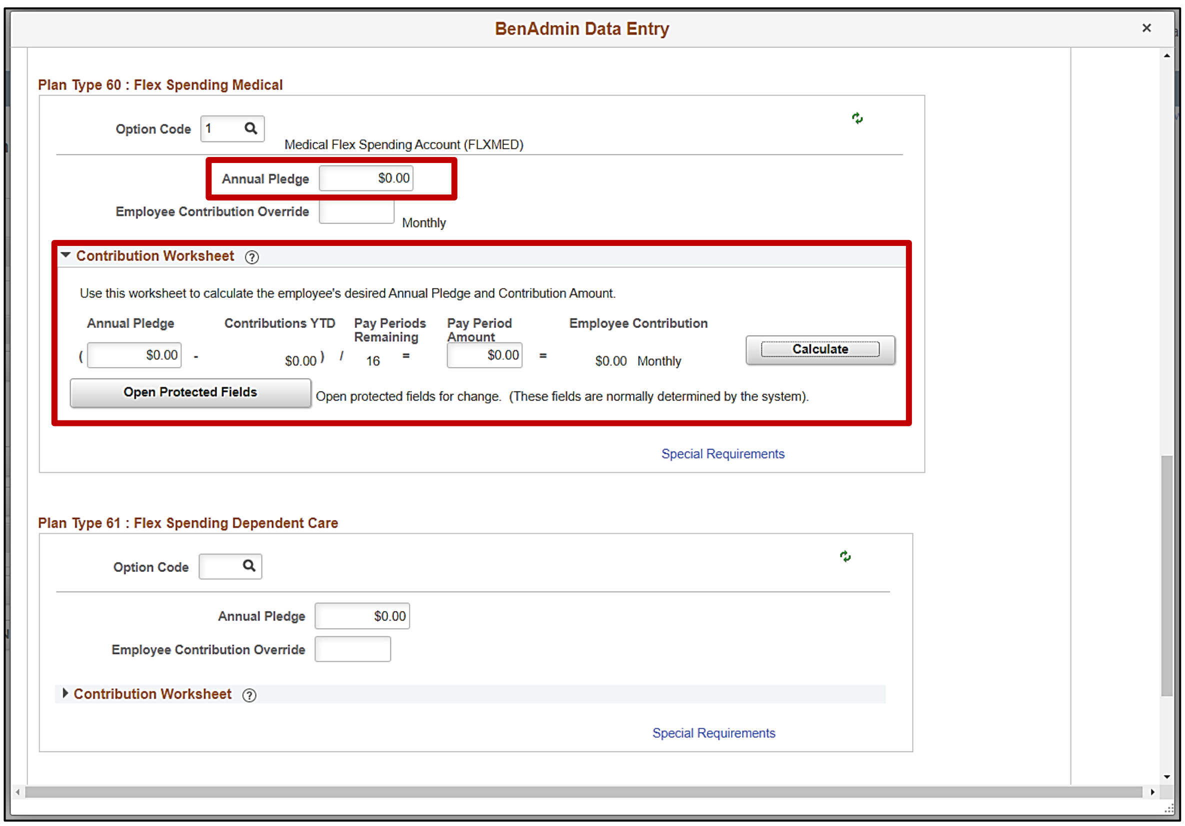
44. Click the **Flex Spending Medical Option Code Look Up** icon.

The **Look Up Option Code** page displays in a pop-up window.



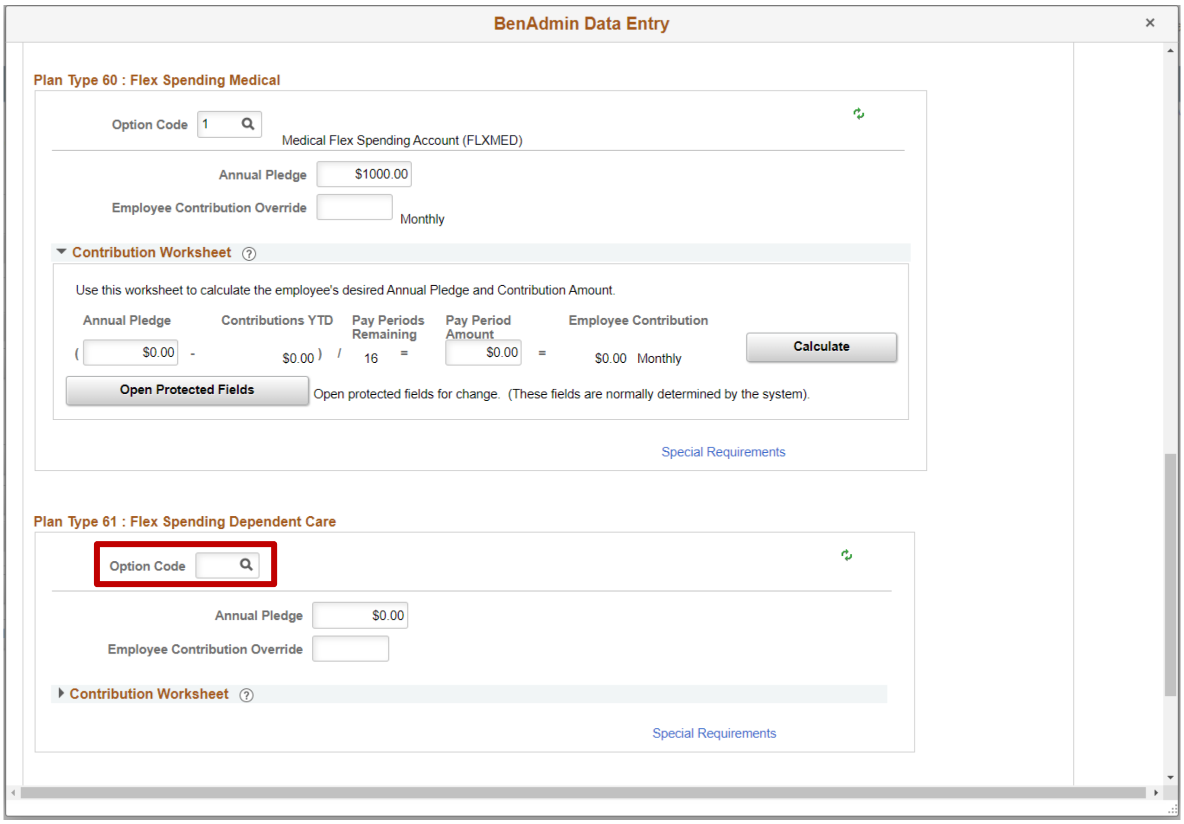
45. Click the **Option Code 1** link.

The **Option Election** tab redisplays



46. Enter the employee's annual pledge amount in the **Annual Pledge** field.

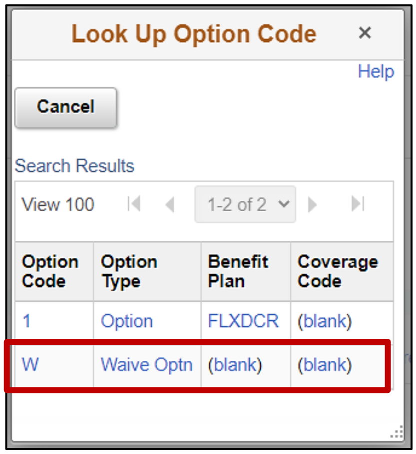
    Note: If the employee provided a Pay Period amount vice an annual pledge amount, use the **Contribution Worksheet** section to calculate the annual pledge amount and then enter this calculated amount in the **Annual Pledge** field. To perform this, enter the Pay Period amount provided by the employee in the **Pay Period Amount** field and then click the **Calculate** button. The calculated amount will display in the **Annual Pledge** field (within the **Contribution Worksheet** section). Enter this amount in the **Annual Pledge** field.



Next, complete the **Plan Type 61: Flex Spending Dependent Care** section. If Steps 47 - 48 are not completed, the system will automatically waive the Flex Spending Dependent Care plan for the employee as this is not a required plan.

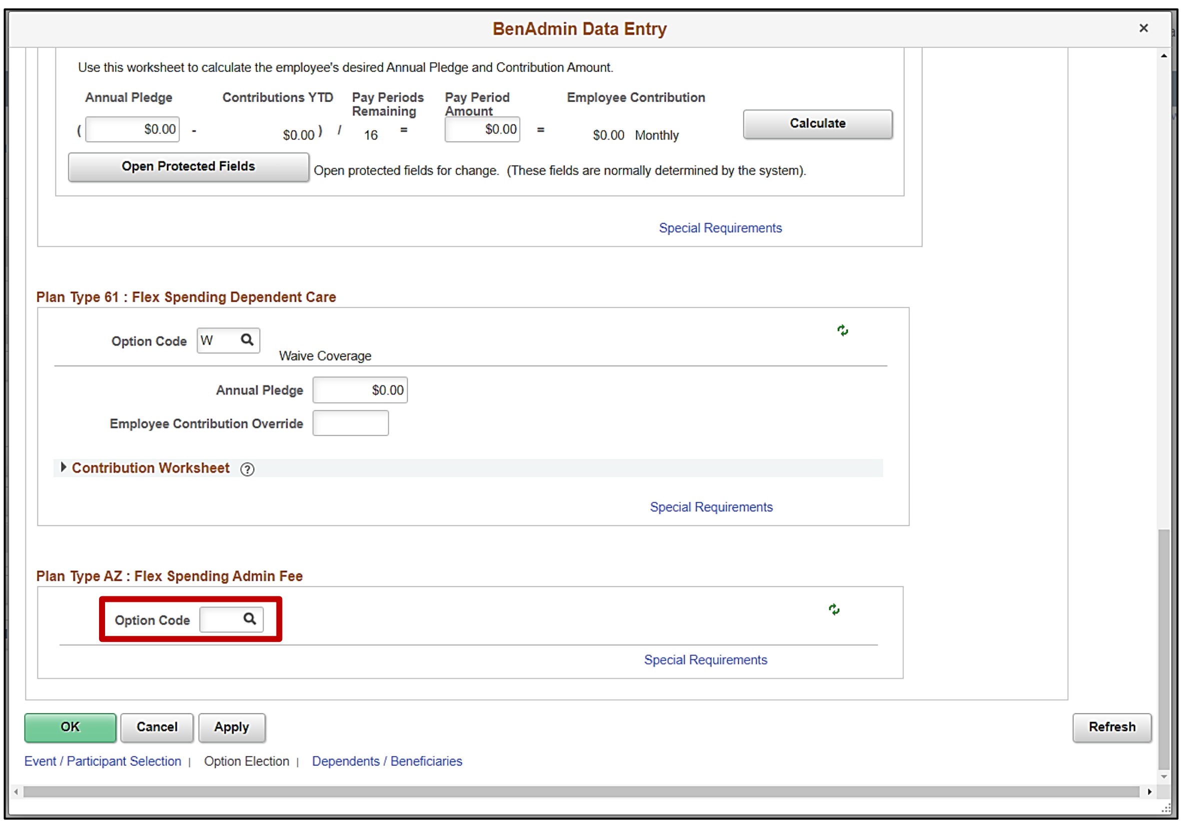
47. Click the **Flex Spending Dependent Care Option Code Look Up** icon.

The **Look Up Option Code** page displays in a pop-up window.



48. Click the **Option Code W (Waive)** link.

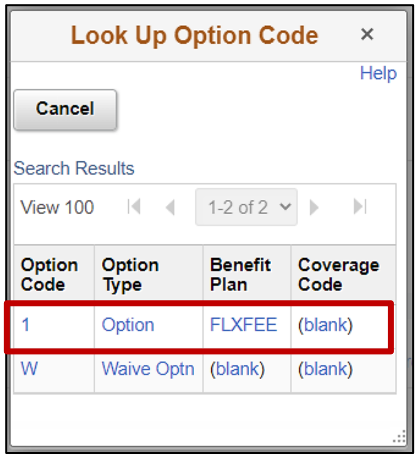
The **Option Election** tab redisplays.



If either a Flex Spending Medical plan or a Flex Spending Dependent Care plan was elected for the employee, the Flex Spending Admin Fee must be elected. Cardinal will provide an error if this is not completed. If neither of these plans was elected for the employee, the system will automatically waive the Flex Spending Admin Fee.

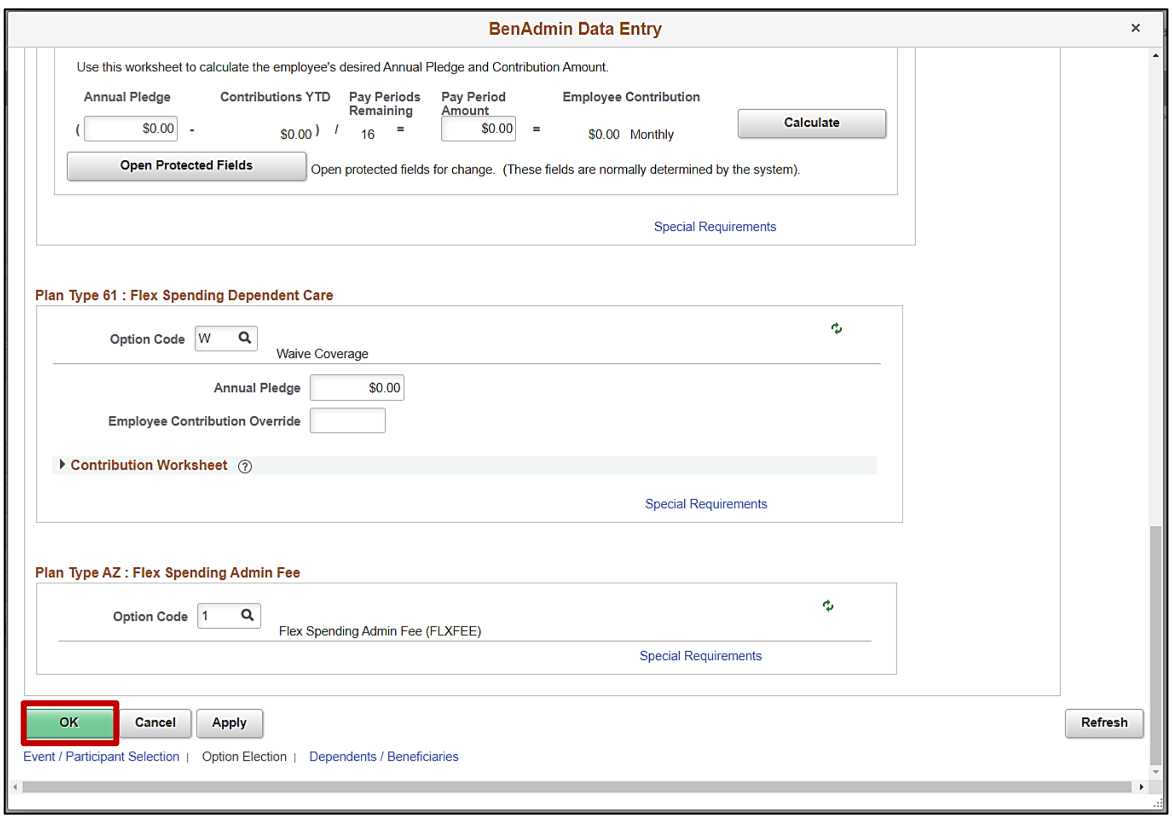
49. Click the **Flex Spending Admin Fee Option Code Look Up** icon.

The **Look Up Option Code** page displays in a pop-up window.



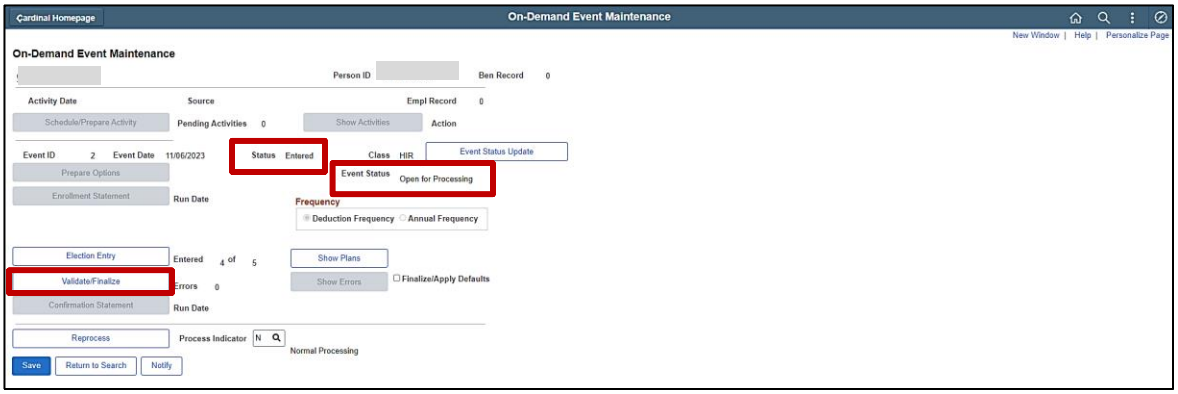
50. Click the **Option Code 1** link.

The **Option Election** tab redisplays.



51. Once all elections have been made, click the **OK** button.

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



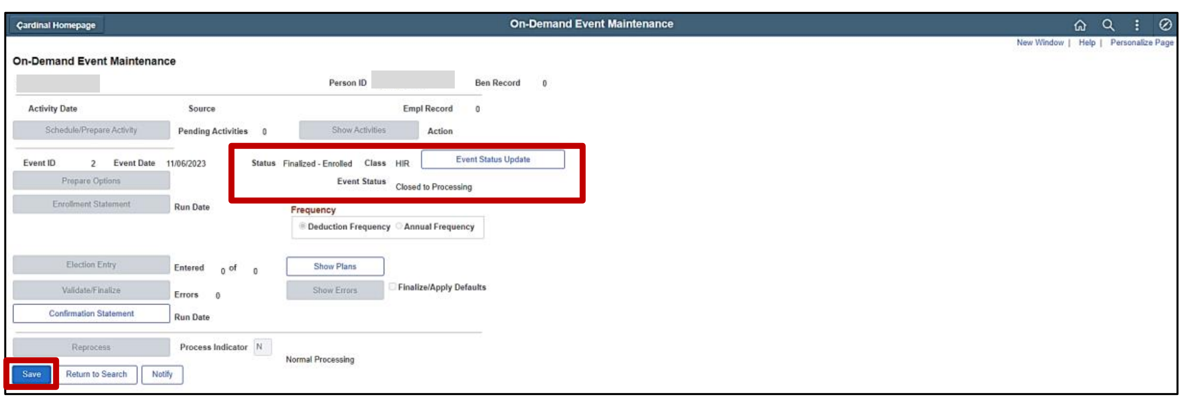
Note: The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.

52. Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

A **Confirmation** message displays in a pop-up window once the process completes.

53. Click the **OK** button.

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



Note: The **Status** field will now display as “Finalized-Enrolled”. The **Event Status** field will now display as “Closed to Processing”.

54. Click the **Save** button.