

**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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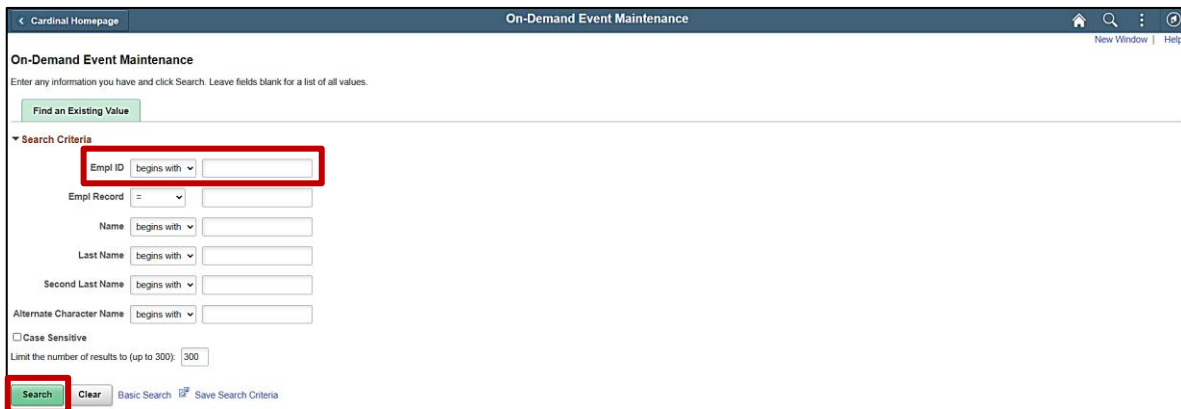
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## Completing a New Hire Benefit Enrollment

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.

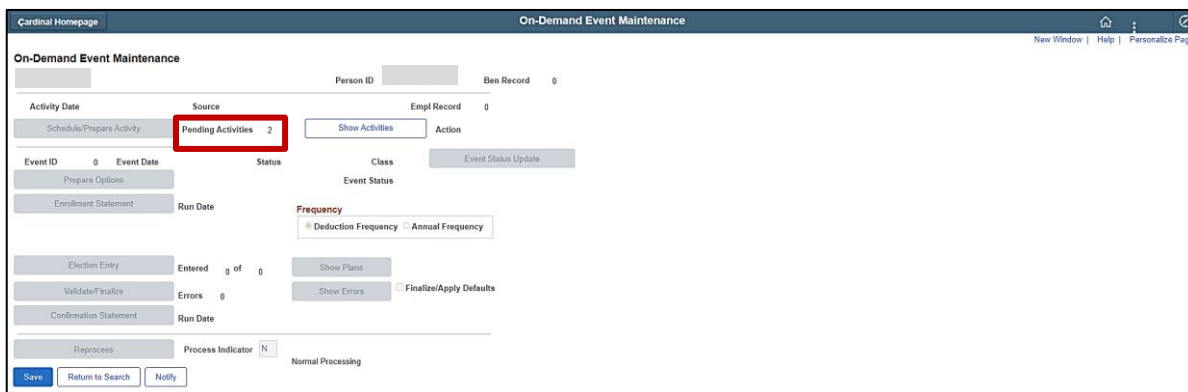


2. Enter the employee's Employee ID in the **Empl ID** field.

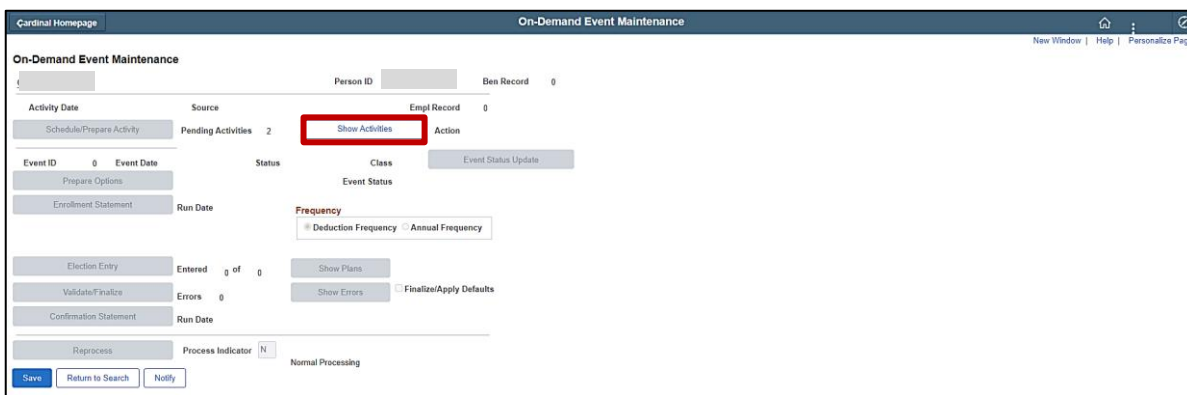
**Note:** Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

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



On-Demand Event Maintenance

Person ID [redacted] Ben Record 0

Activity Date [redacted] Source [redacted] Empl Record 0

Schedule/Prepare Activity Pending Activities 2 **Show Activities** Action

Event ID 0 Event Date [redacted] Status [redacted] Class [redacted] Event Status Update

Prepare Options

Enrollment Statement Run Date [redacted]

Frequency  
 Deduction Frequency  Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalizer/Apply Defaults

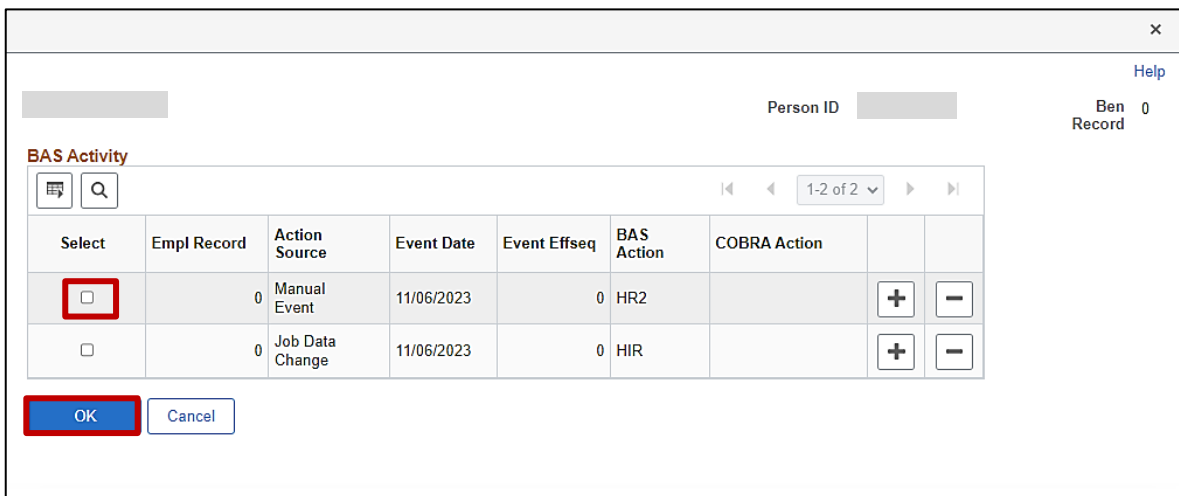
Confirmation Statement Run Date [redacted]

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

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

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



BAS Activity

Person ID [redacted] Ben Record 0

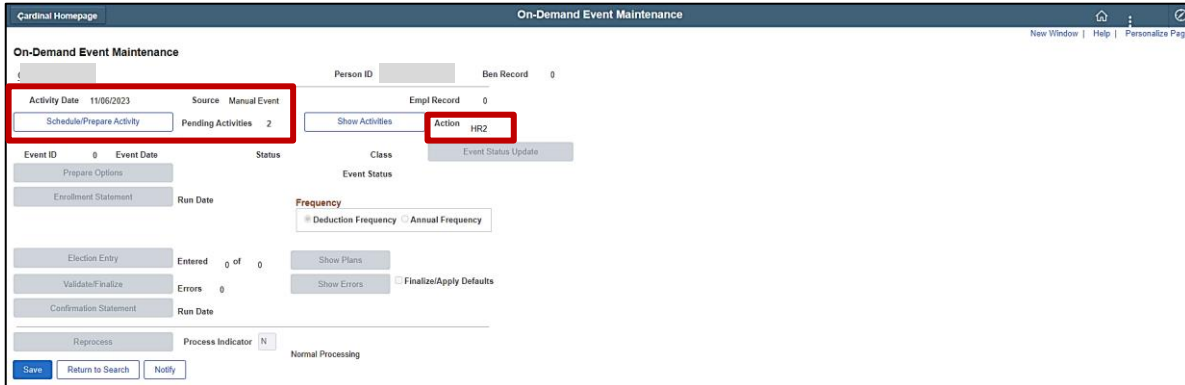
1-2 of 2

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
<input checked="" type="checkbox"/>	0	Manual Event	11/06/2023	0	HR2		+	-
<input type="checkbox"/>	0	Job Data Change	11/06/2023	0	HIR		+	-

OK Cancel

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

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



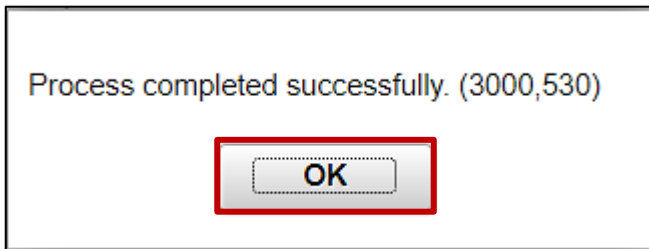
8. Review the **Activity Date** field. This is the date of the employee's New Hire transaction completed by HR. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with your Agency HR to correct prior to processing the new hire benefits enrollment.

**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.

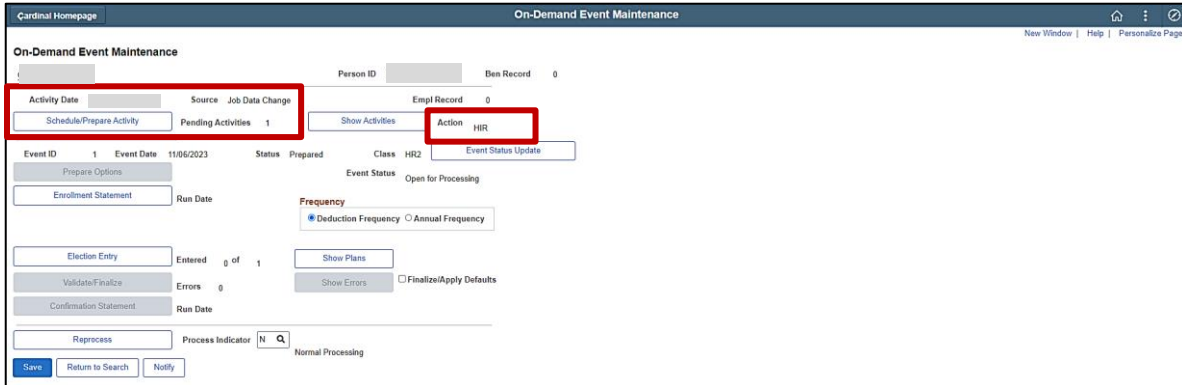
**Note:** This will process and close the HR2 Benefit Event.

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 redisplay.



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.

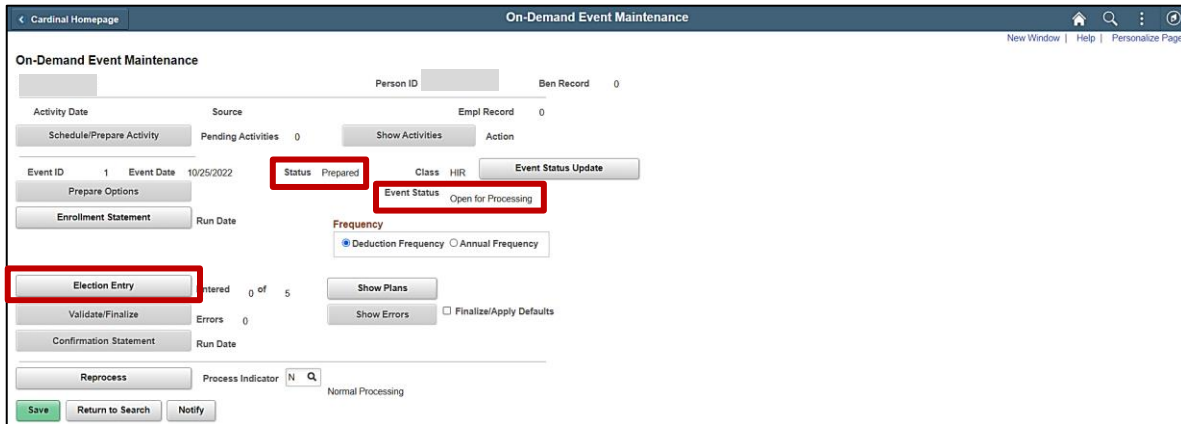
**Note:** Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

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



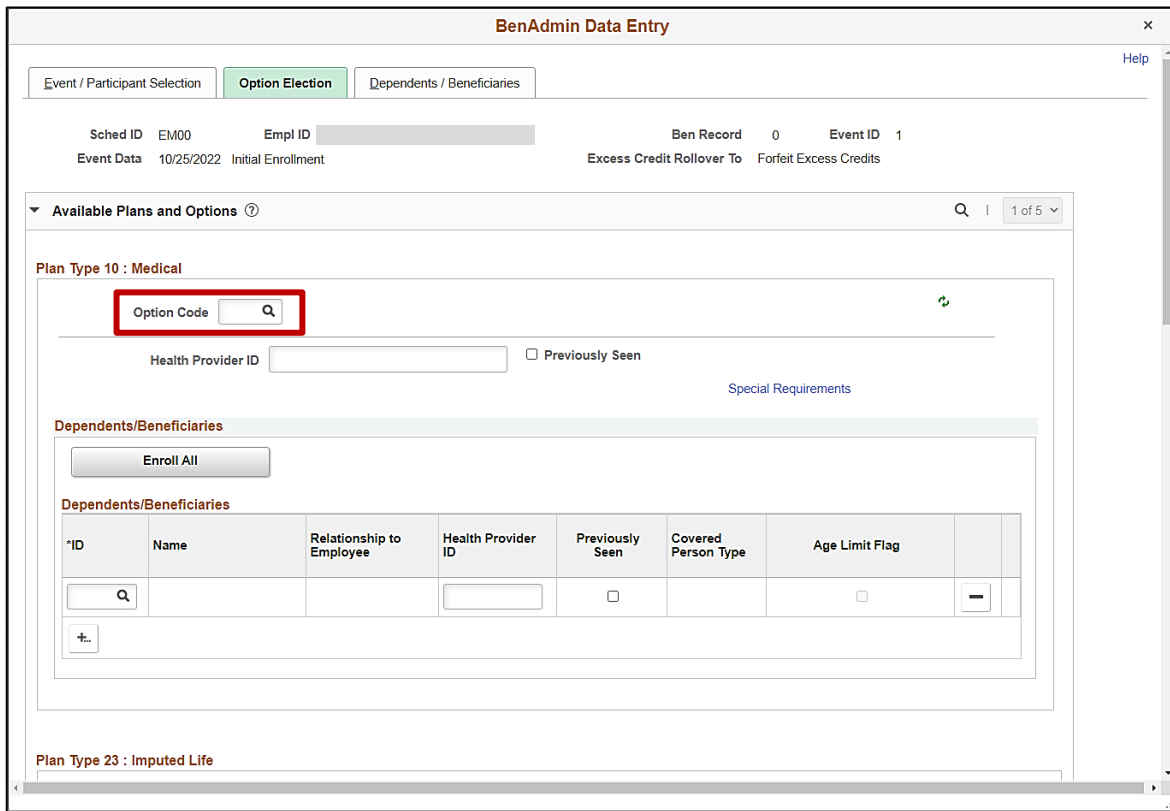
13. Click the **OK** button.

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



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.



The screenshot shows the BenAdmin Data Entry application interface. At the top, there are three tabs: "Event / Participant Selection", "Option Election" (which is selected), and "Dependents / Beneficiaries". Below the tabs, there are several fields for data entry: "Sched ID" (EM00), "Empl ID" (redacted), "Ben Record" (0), "Event ID" (1), "Event Data" (10/25/2022 Initial Enrollment), "Excess Credit Rollover To", and "Forfeit Excess Credits".

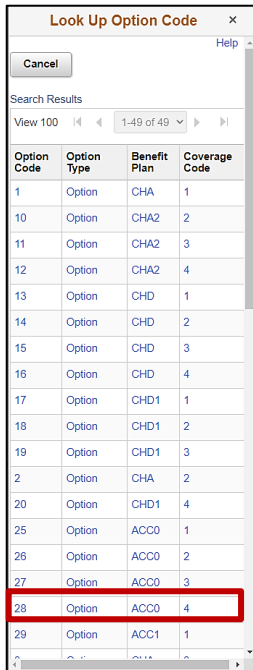
The main section is titled "Available Plans and Options" and contains a search bar with "1 of 5" results. Underneath, there is a section for "Plan Type 10 : Medical". Within this section, the "Option Code" field has a magnifying glass icon (the "Option Code Look Up" icon) highlighted with a red box. Below this, there is a "Health Provider ID" field and a "Previously Seen" checkbox. A "Special Requirements" link is also visible.

Below the "Plan Type 10" section is a "Dependents/Beneficiaries" section with an "Enroll All" button. This section contains a table with the following columns: "ID", "Name", "Relationship to Employee", "Health Provider ID", "Previously Seen", "Covered Person Type", and "Age Limit Flag". The table currently has one row with a search icon in the "ID" column, a redacted "Name" field, a "Relationship to Employee" field, a "Health Provider ID" field, a "Previously Seen" checkbox, a "Covered Person Type" field, and an "Age Limit Flag" checkbox. There is also a "+" icon in the bottom left corner of the table area.

At the bottom of the application, there is a section for "Plan Type 23 : Imputed Life".

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.



The screenshot shows a pop-up window titled "Look Up Option Code" with a "Cancel" button and a "Help" link. Below the title bar, there is a "Search Results" section with a "View 100" dropdown and a pagination indicator "1-49 of 49". The main content is a table with four columns: "Option Code", "Option Type", "Benefit Plan", and "Coverage Code". The table lists 29 rows of data. The row with "Option Code" 28, "Option Type" Option, "Benefit Plan" ACC0, and "Coverage Code" 4 is highlighted with a red border.

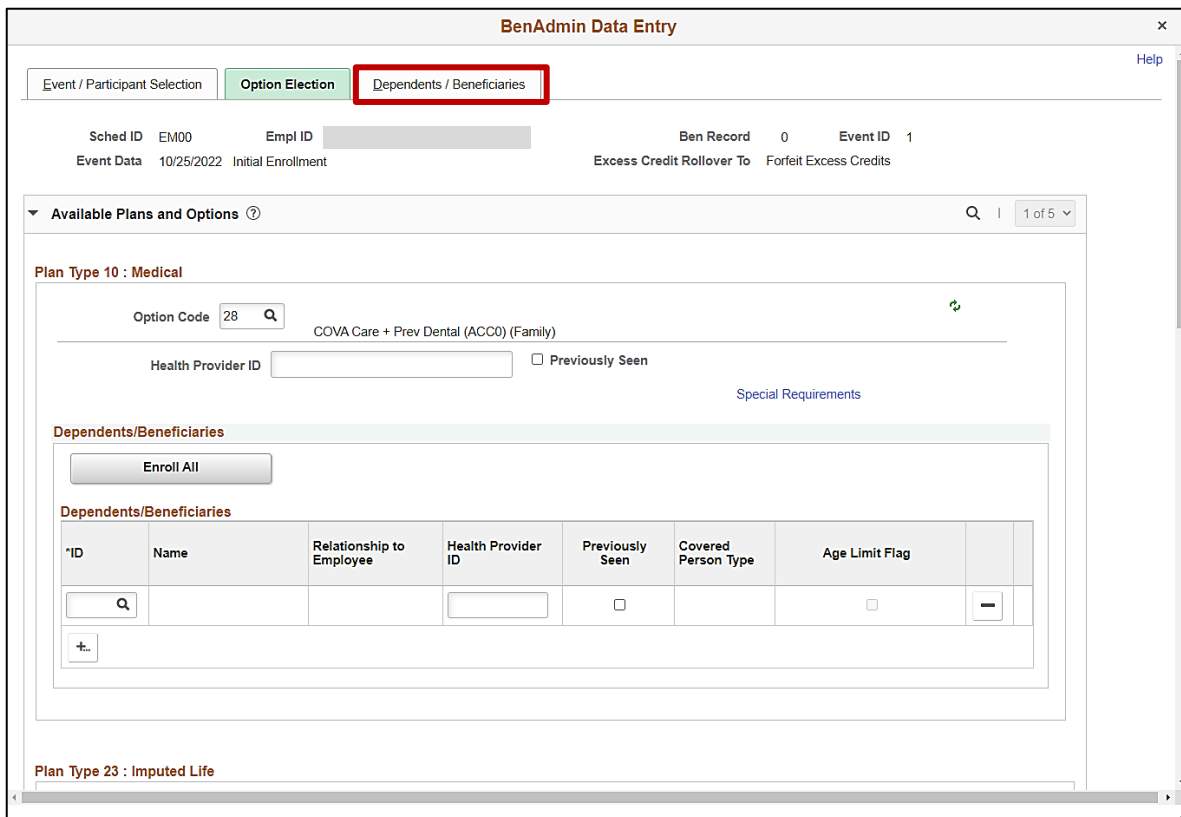
Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1
18	Option	CHD1	2
19	Option	CHD1	3
2	Option	CHA	2
20	Option	CHD1	4
25	Option	ACC0	1
26	Option	ACC0	2
27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



BenAdmin Data Entry

Event / Participant Selection    **Option Election**    Dependents / Beneficiaries    Help

Sched ID   EM00    Empl ID   [REDACTED]    Ben Record   0    Event ID   1  
 Event Data   10/25/2022   Initial Enrollment    Excess Credit Rollover To   Forfeit Excess Credits

▼ Available Plans and Options ⓘ    🔍 | 1 of 5 ▼

**Plan Type 10 : Medical**

Option Code   28   🔍    COVA Care + Prev Dental (ACC0) (Family)    ↻

Health Provider ID   [REDACTED]     Previously Seen    [Special Requirements](#)

**Dependents/Beneficiaries**

Enroll All

**Dependents/Beneficiaries**

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
[REDACTED]			[REDACTED]	<input type="checkbox"/>		<input type="checkbox"/>	-
+..							

**Plan Type 23 : Imputed Life**

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.

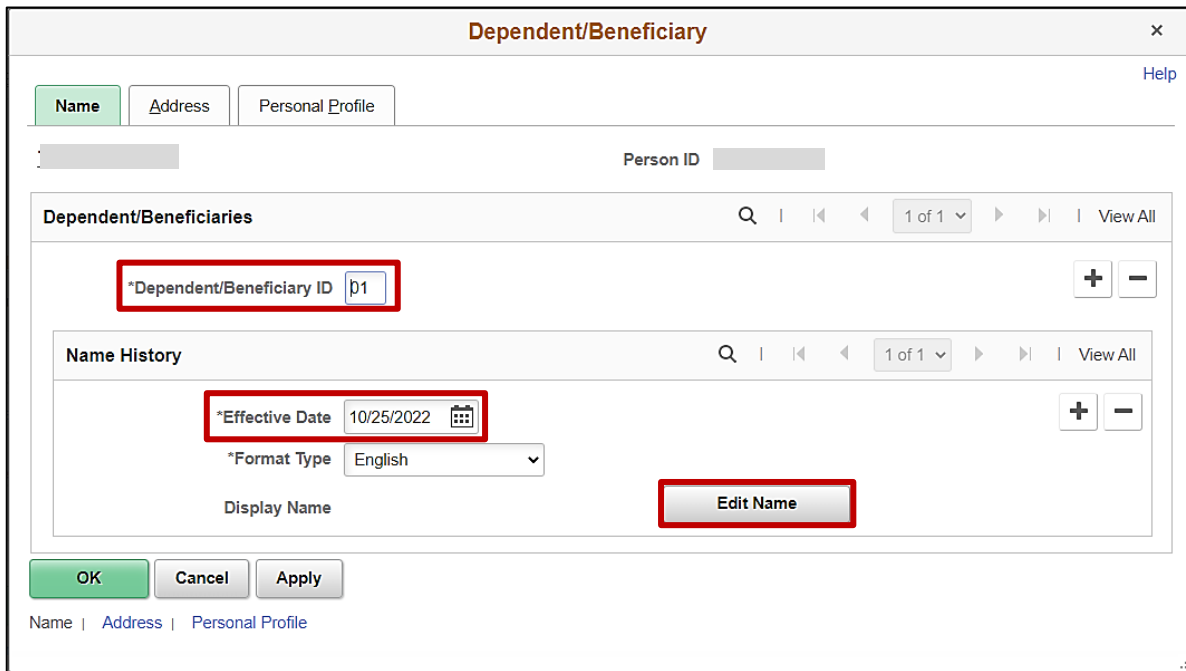


The **Dependent / Beneficiaries** tab displays.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The window title is 'BenAdmin Data Entry' and it has a 'Help' link in the top right corner. Below the tabs, there are fields for 'Schedule ID' (EM00), 'Employee ID' (redacted), 'Event ID' (1), 'Event Data' (10/25/2022), 'Benefit Record' (0), 'Initial Enrollment', and 'Excess Credit Rollover To' (Forfeit Excess Credits). A section titled 'Dependent/Beneficiaries Currently on Record' contains a table with columns: Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. Below the table is a red-bordered button labeled 'Change/Add Dependent Data'. A section titled 'Elections Requiring Supplemental Information' shows a table with columns for election ID (10), election name (Medical), and an 'Enroll Dependents' link. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons, and a 'Refresh' button on the right. A breadcrumb trail at the bottom reads 'Event / Participant Selection | Option Election | Dependents / Beneficiaries'.

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

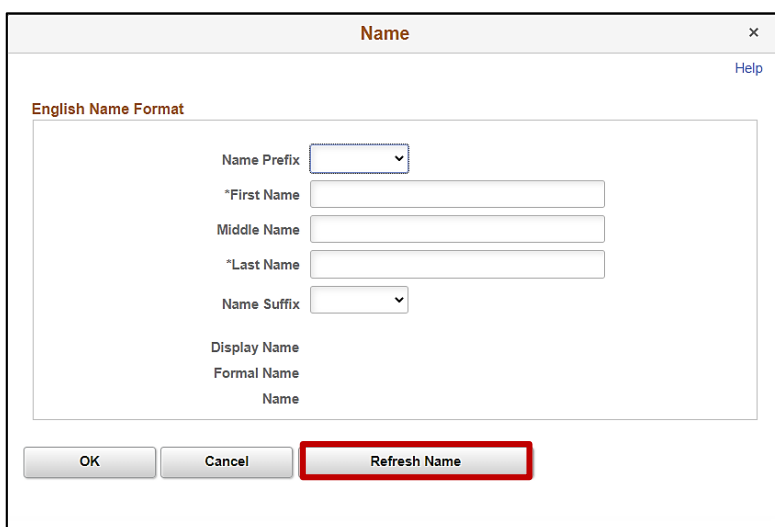
The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.



**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.

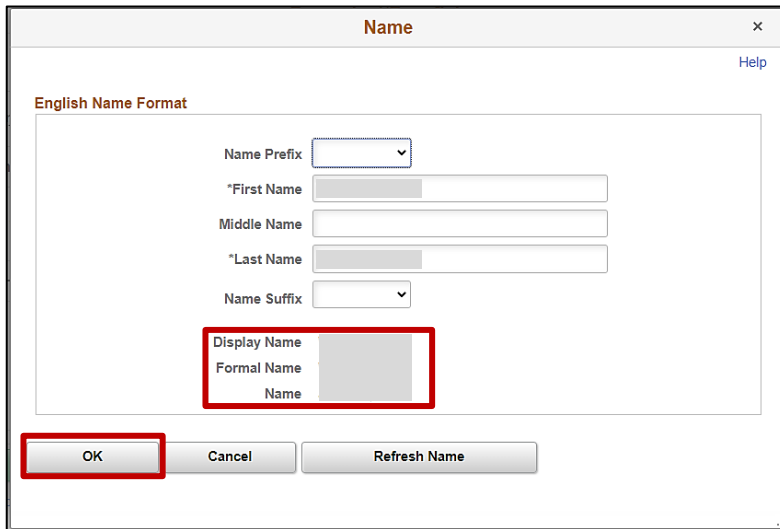
The **Name** page displays in a pop-up window.



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.

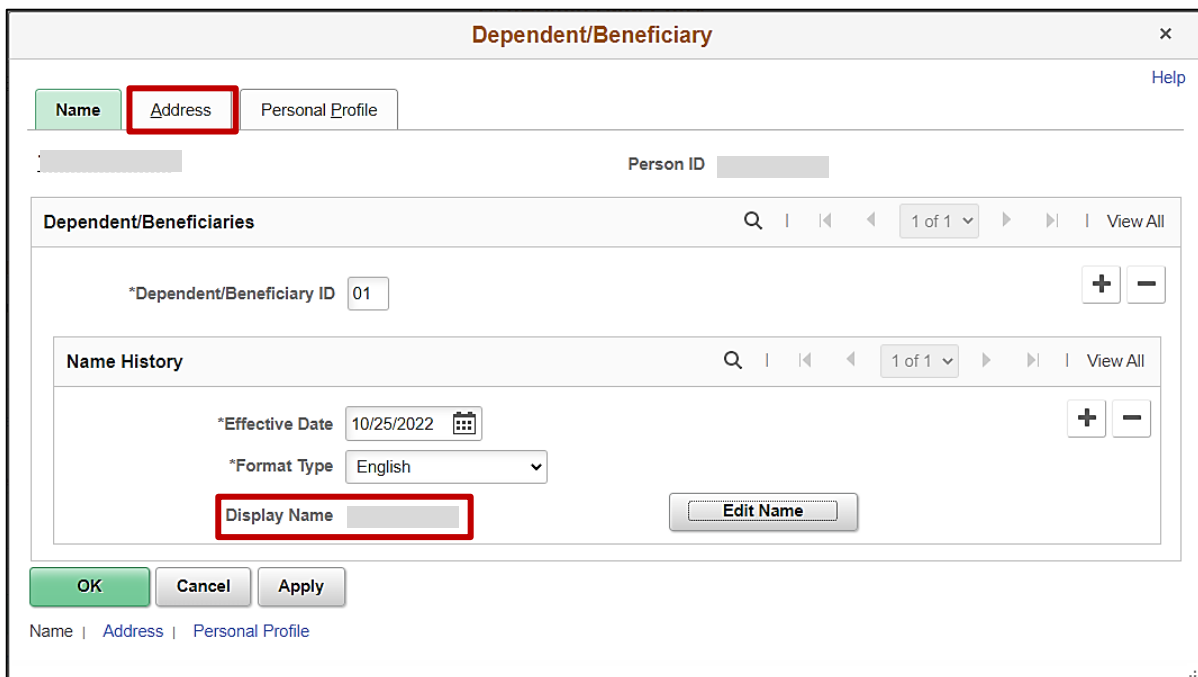
The **Name** page refreshes.



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

24. Click the **OK** button.

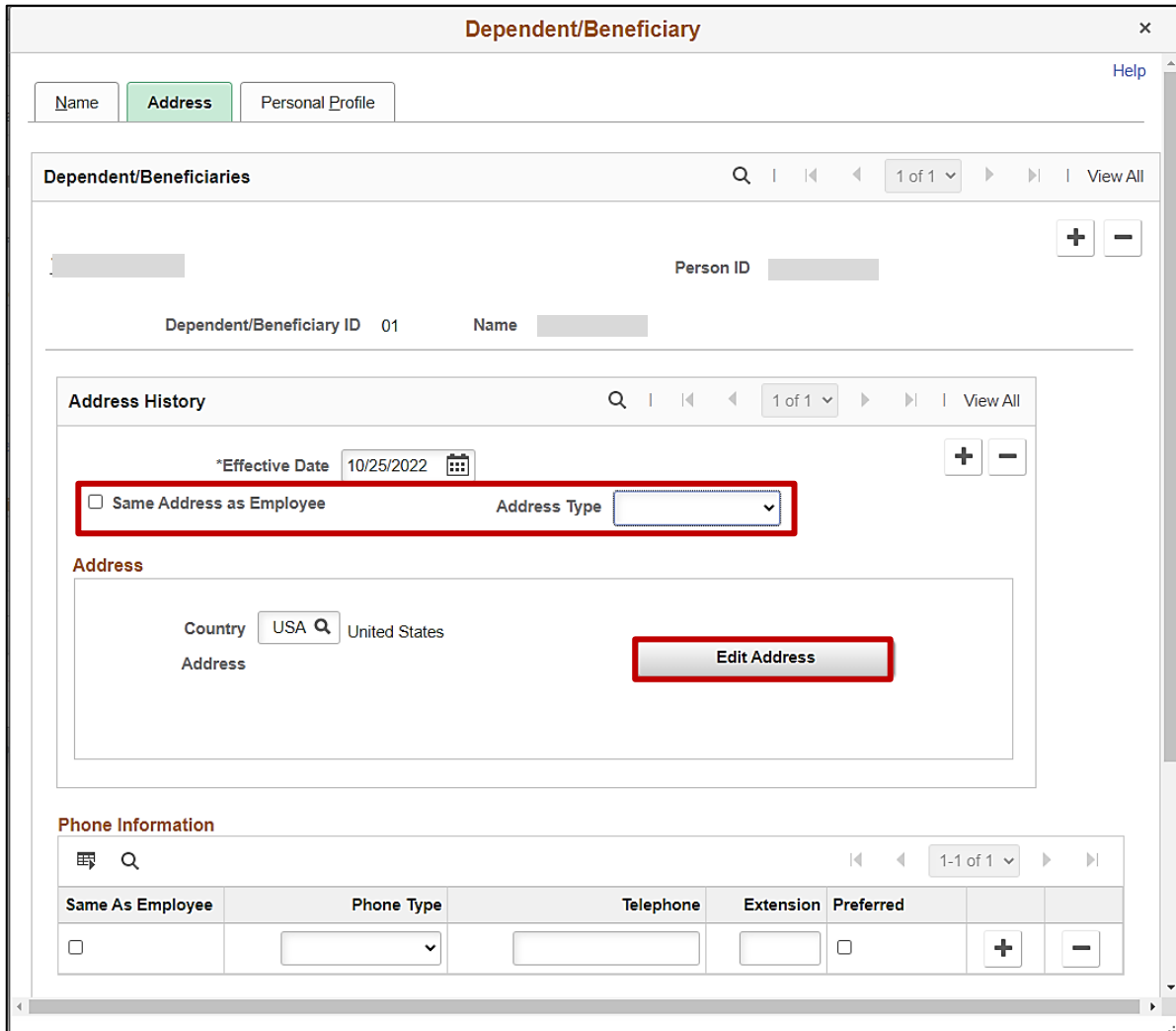
The **Name** tab redisplay.



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

25. Click the **Address** tab.

The **Address** tab displays.



**Dependent/Beneficiary**

Name Address Personal Profile

Dependent/Beneficiaries

Person ID

Dependent/Beneficiary ID 01 Name

**Address History**

\*Effective Date 10/25/2022

Same Address as Employee Address Type

**Address**

Country USA United States

Address

**Edit Address**

**Phone Information**

Same As Employee	Phone Type	Telephone	Extension	Preferred
<input type="checkbox"/>				<input type="checkbox"/>

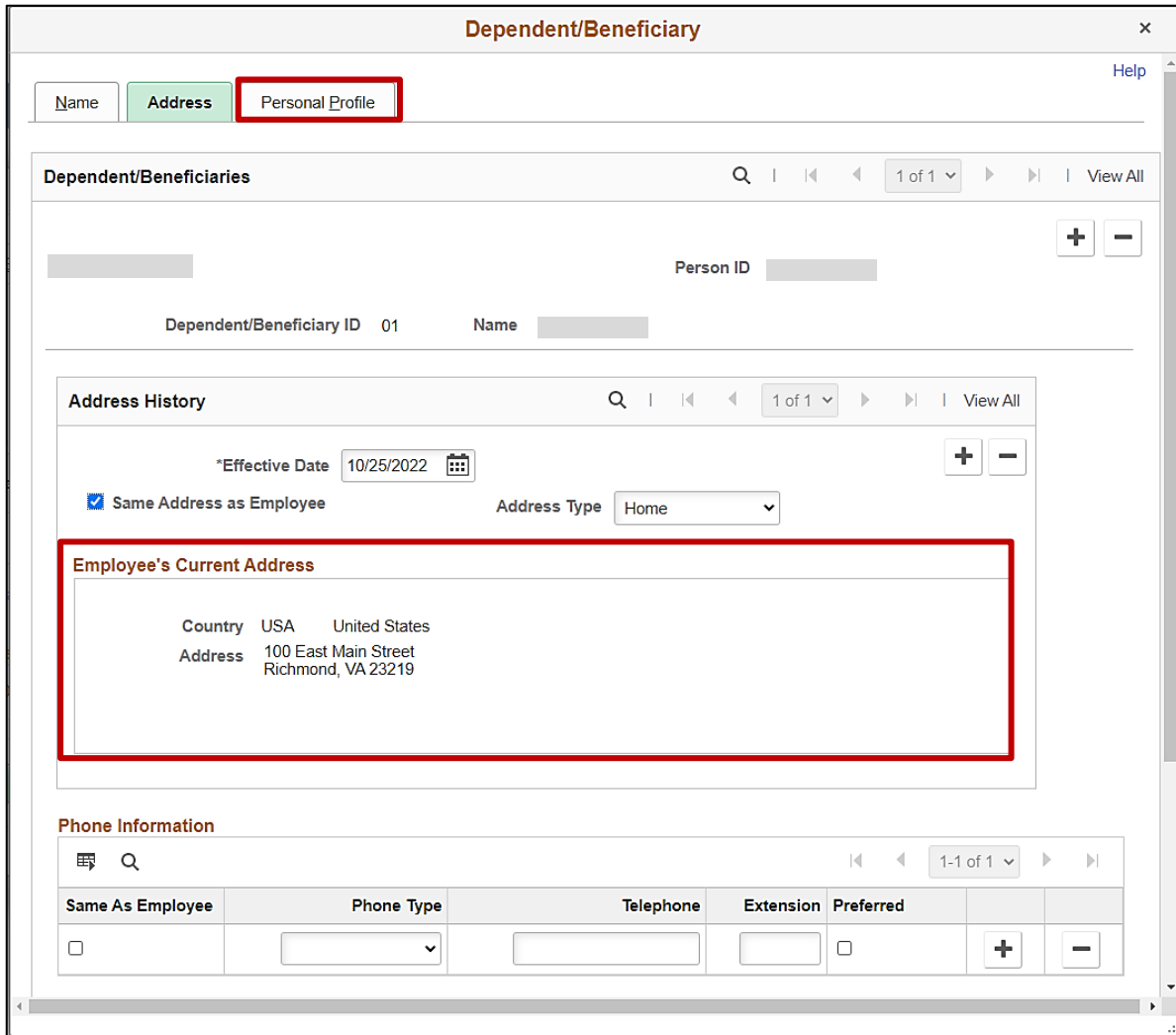
26. Complete the address information as applicable for the dependent by either:

- 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.



**Dependent/Beneficiary**

Name Address **Personal Profile**

Dependent/Beneficiaries 1 of 1 View All

Person ID

Dependent/Beneficiary ID 01 Name

**Address History** 1 of 1 View All

\*Effective Date 10/25/2022

Same Address as Employee Address Type Home

**Employee's Current Address**

Country USA United States  
Address 100 East Main Street  
Richmond, VA 23219

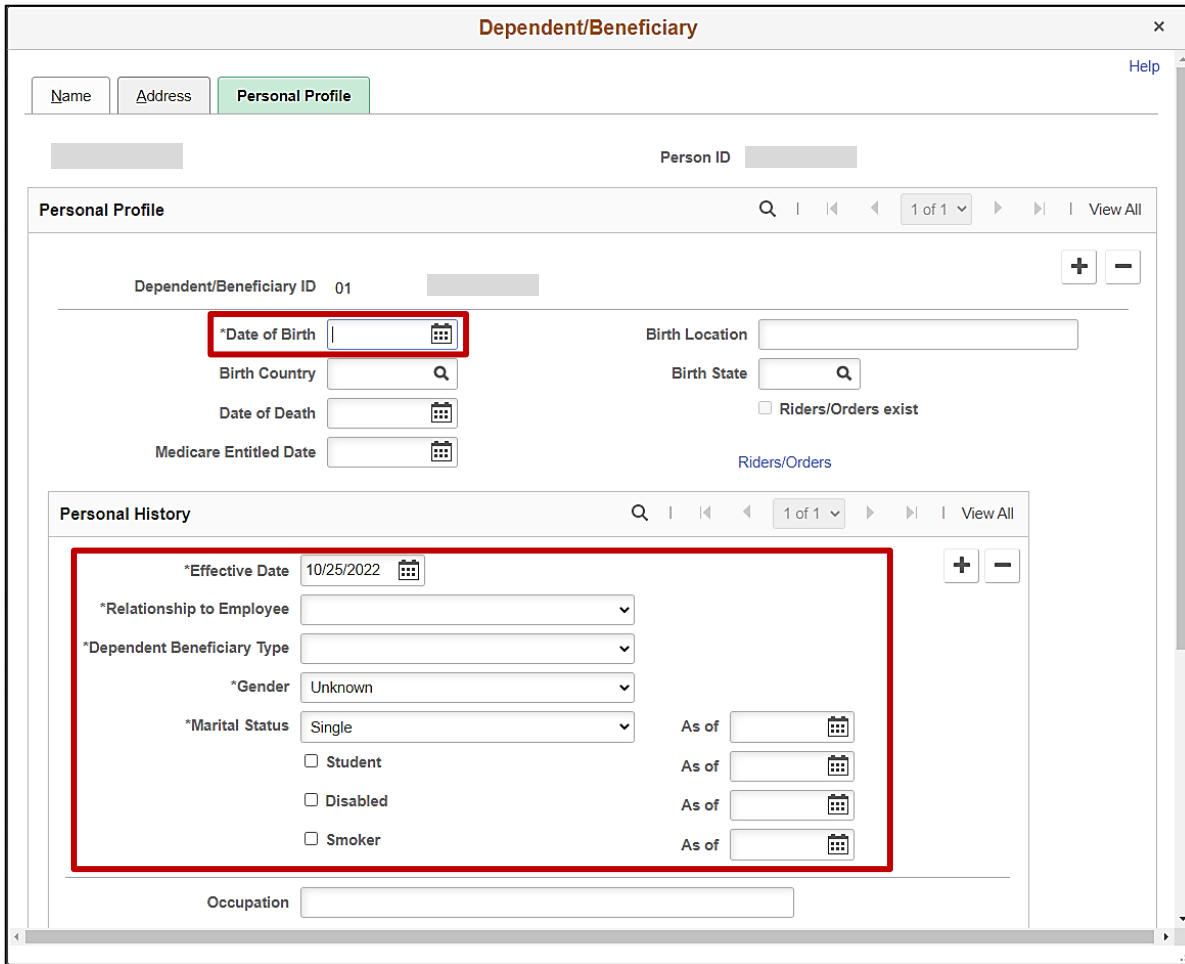
**Phone Information** 1-1 of 1

Same As Employee	Phone Type	Telephone	Extension	Preferred		
<input type="checkbox"/>				<input type="checkbox"/>	+	-

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

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

The **Personal Profile** tab displays.



The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are tabs for "Name", "Address", and "Personal Profile", with "Personal Profile" being the active tab. Below the tabs, there are fields for "Name" and "Person ID". The main content area is divided into two sections: "Personal Profile" and "Personal History".

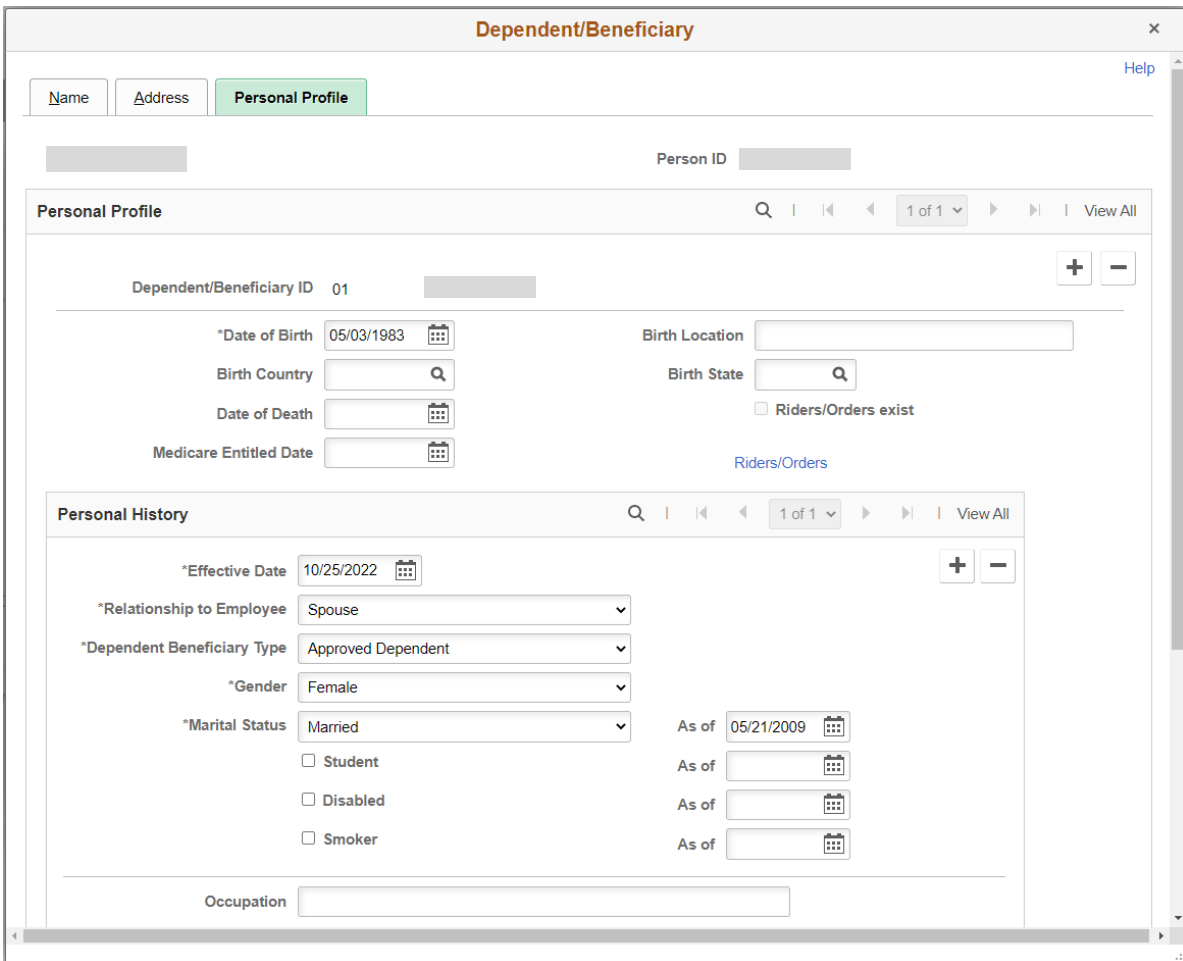
In the "Personal Profile" section, the "Date of Birth" field is highlighted with a red box. Other fields include "Birth Country", "Date of Death", "Medicare Entitled Date", "Birth Location", "Birth State", and a checkbox for "Riders/Orders exist".

The "Personal History" section is also highlighted with a red box. It contains several dropdown menus: "\*Effective Date" (with a calendar icon), "\*Relationship to Employee", "\*Dependent Beneficiary Type", "\*Gender" (set to "Unknown"), and "\*Marital Status" (set to "Single"). Below the "Marital Status" dropdown are four checkboxes: "Student", "Disabled", and "Smoker". To the right of the "Marital Status" dropdown are four "As of" date fields, each with a calendar icon.

**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.



The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are tabs for "Name", "Address", and "Personal Profile", with "Personal Profile" being the active tab. Below the tabs, there is a "Person ID" field. The main content area is divided into two sections: "Personal Profile" and "Personal History".

**Personal Profile Section:**

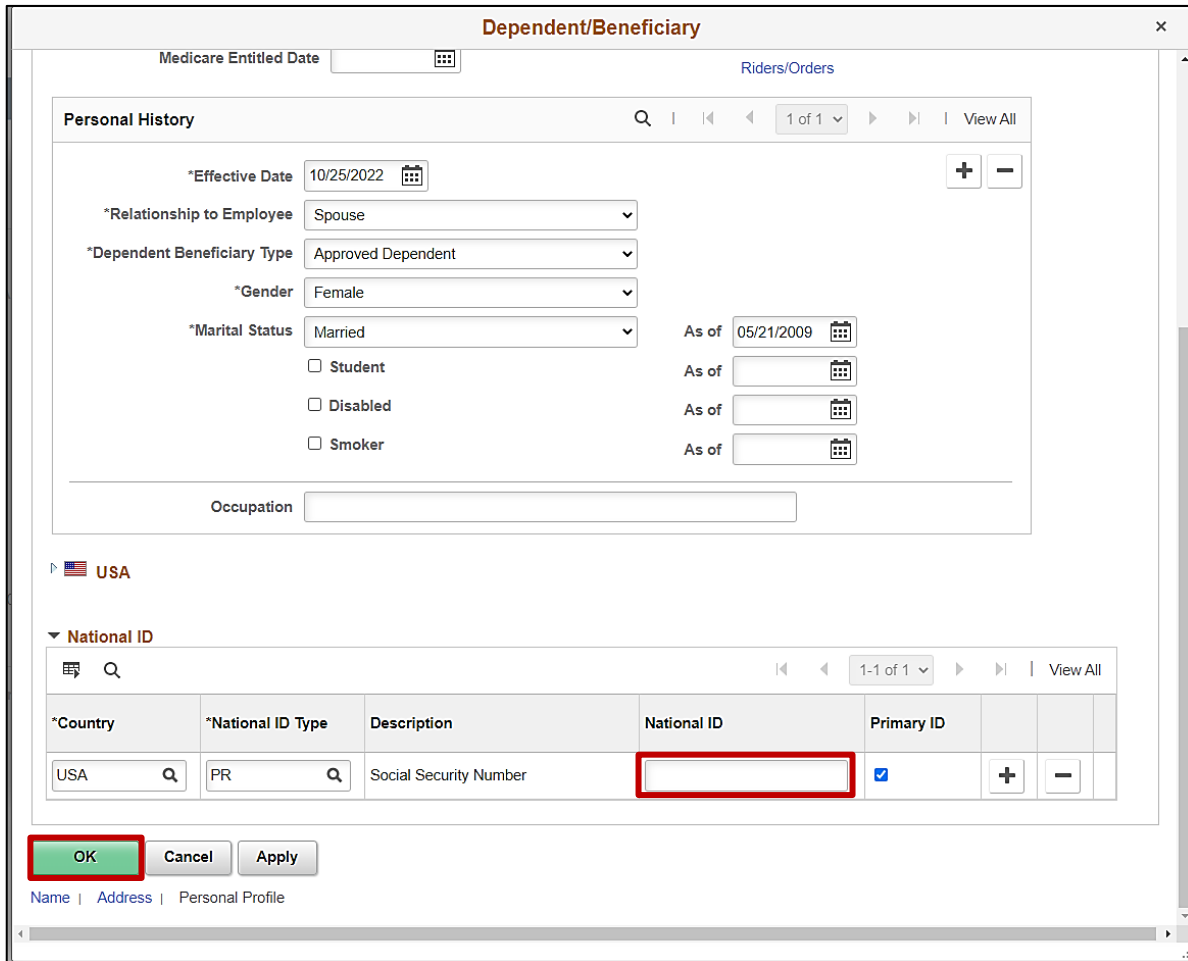
- Dependent/Beneficiary ID: 01
- \*Date of Birth: 05/03/1983
- Birth Country: [Searchable field]
- Date of Death: [Calendar icon]
- Medicare Entitled Date: [Calendar icon]
- Birth Location: [Text field]
- Birth State: [Searchable field]
- Riders/Orders exist
- [Riders/Orders](#)

**Personal History Section:**

- \*Effective Date: 10/25/2022
- \*Relationship to Employee: Spouse
- \*Dependent Beneficiary Type: Approved Dependent
- \*Gender: Female
- \*Marital Status: Married
- Student
- Disabled
- Smoker
- As of: 05/21/2009
- As of: [Calendar icon]
- As of: [Calendar icon]
- As of: [Calendar icon]
- Occupation: [Text field]

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





Medicare Entitled Date  Riders/Orders

**Personal History**  |  |  | 1 of 1 |  | View All

\*Effective Date  10/25/2022

\*Relationship to Employee  Spouse

\*Dependent Beneficiary Type  Approved Dependent

\*Gender  Female

\*Marital Status  Married  As of  05/21/2009

Student  As of

Disabled  As of

Smoker  As of

Occupation

USA

**National ID**  |  | 1-1 of 1 |  | View All

*Country	*National ID Type	Description	National ID	Primary ID		
USA	PR	Social Security Number	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="text"/>	<input type="text"/>

OK  Cancel  Apply

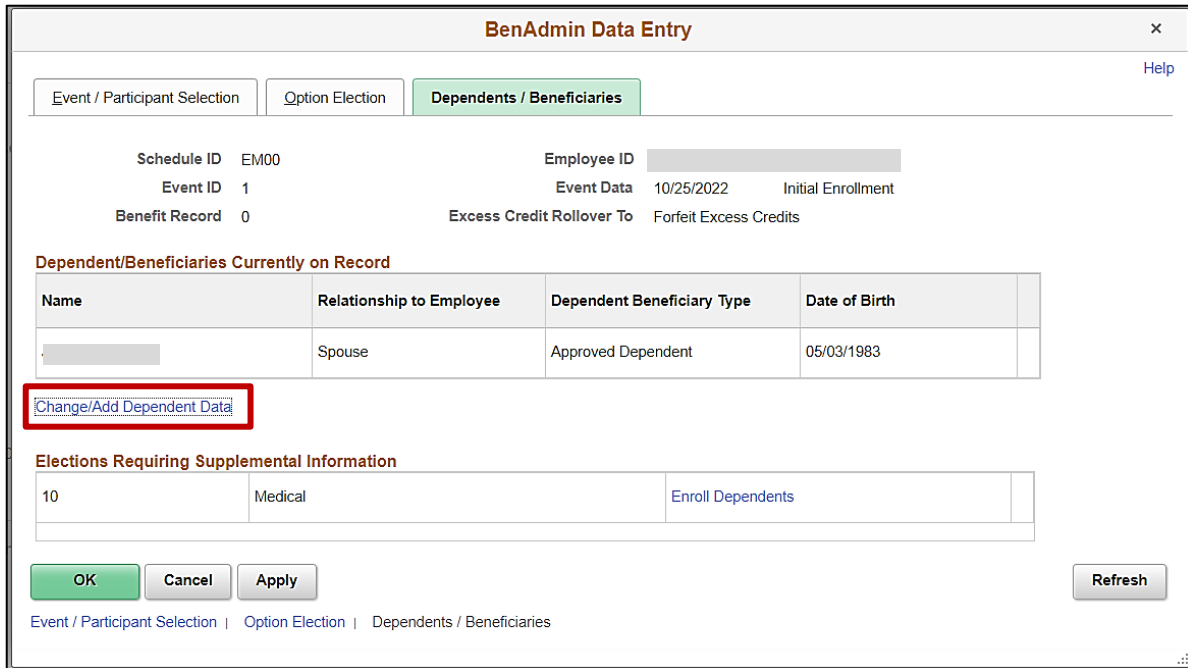
[Name](#) | [Address](#) | [Personal Profile](#)

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 redisplay.



**BenAdmin Data Entry**

Event / Participant Selection | Option Election | **Dependents / Beneficiaries** | Help

Schedule ID EM00 Employee ID [Redacted]  
 Event ID 1 Event Data 10/25/2022 Initial Enrollment  
 Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits

**Dependent/Beneficiaries Currently on Record**

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
[Redacted]	Spouse	Approved Dependent	05/03/1983

[Change/Add Dependent Data](#)

**Elections Requiring Supplemental Information**

10	Medical	<a href="#">Enroll Dependents</a>
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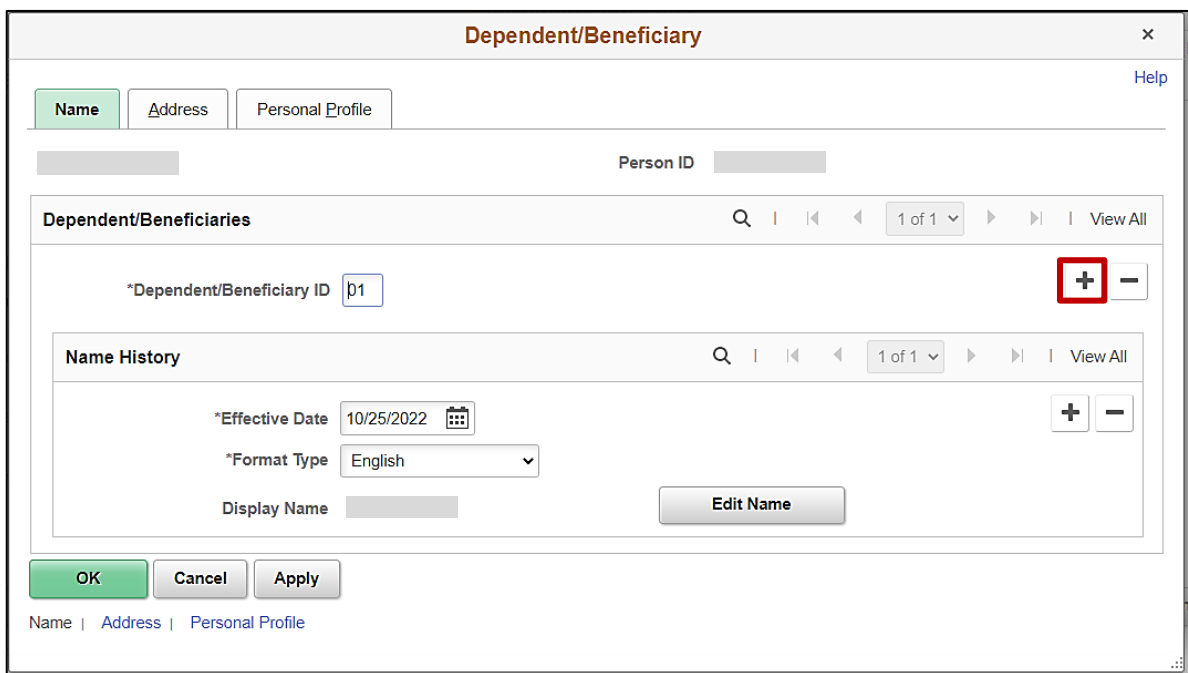
OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

**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 redisplay.



**Dependent/Beneficiary**

Name | Address | Personal Profile | Help

[Redacted] Person ID [Redacted]

**Dependent/Beneficiaries** | 1 of 1 | View All

\*Dependent/Beneficiary ID [01] [+](#) [-](#)

**Name History** | 1 of 1 | View All

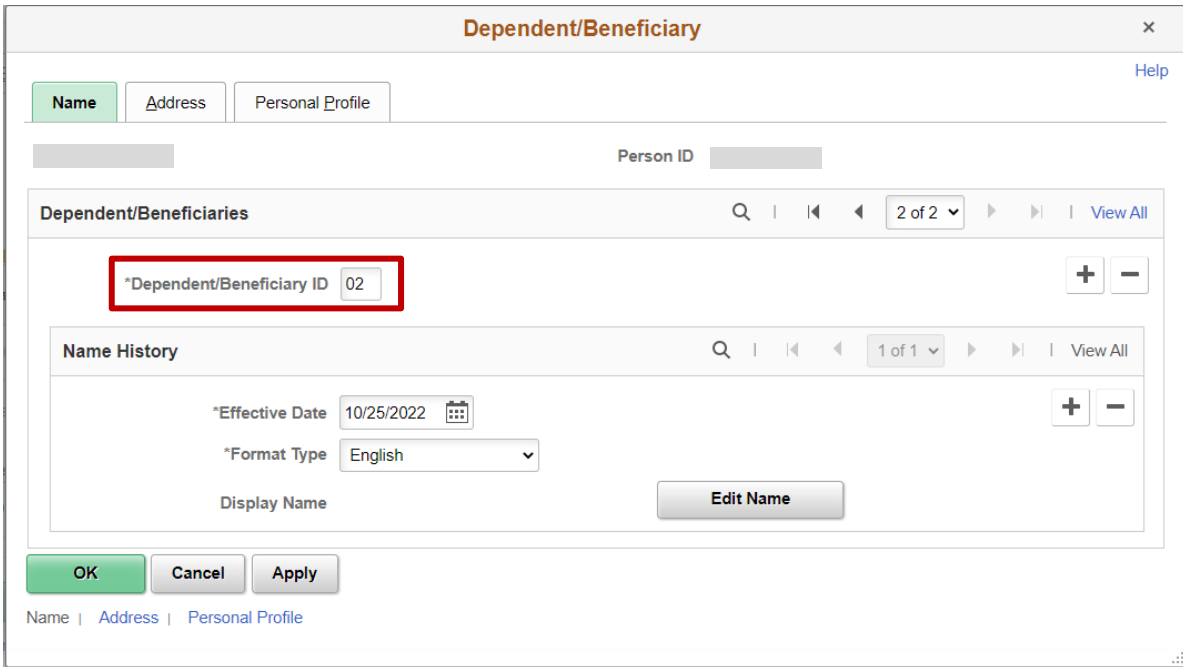
\*Effective Date 10/25/2022 [+](#) [-](#)  
 \*Format Type English  
 Display Name [Redacted] [Edit Name](#)

OK Cancel Apply

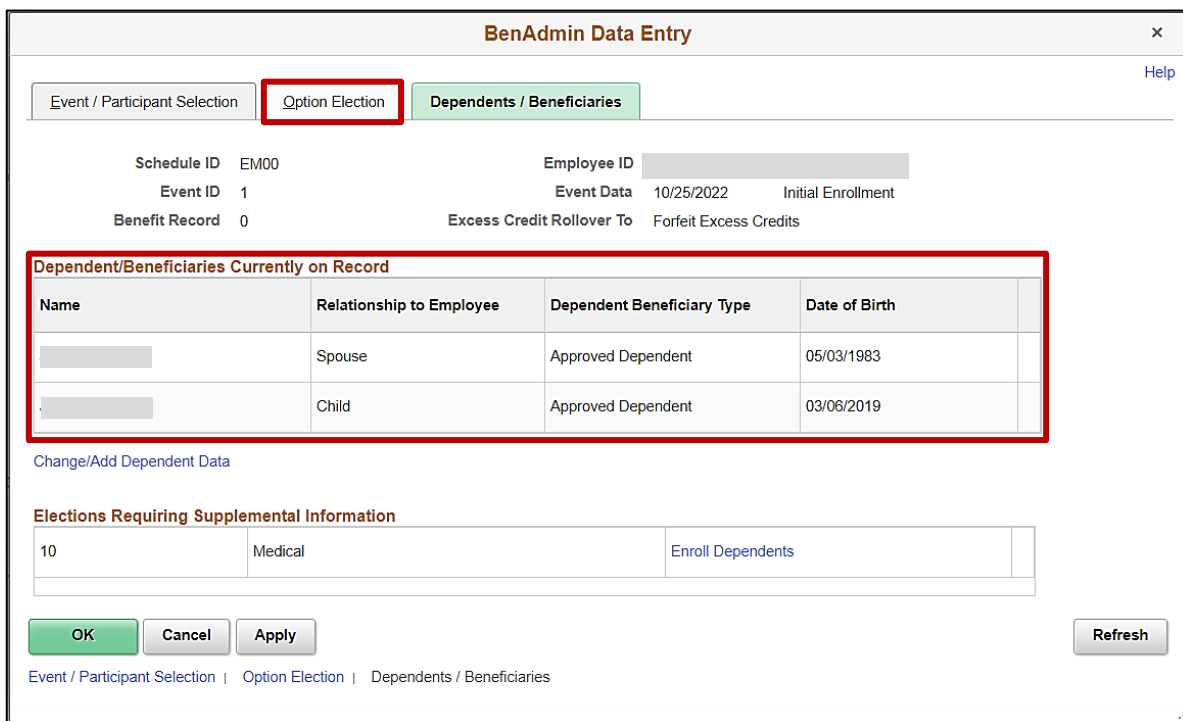
Name | Address | Personal Profile

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.

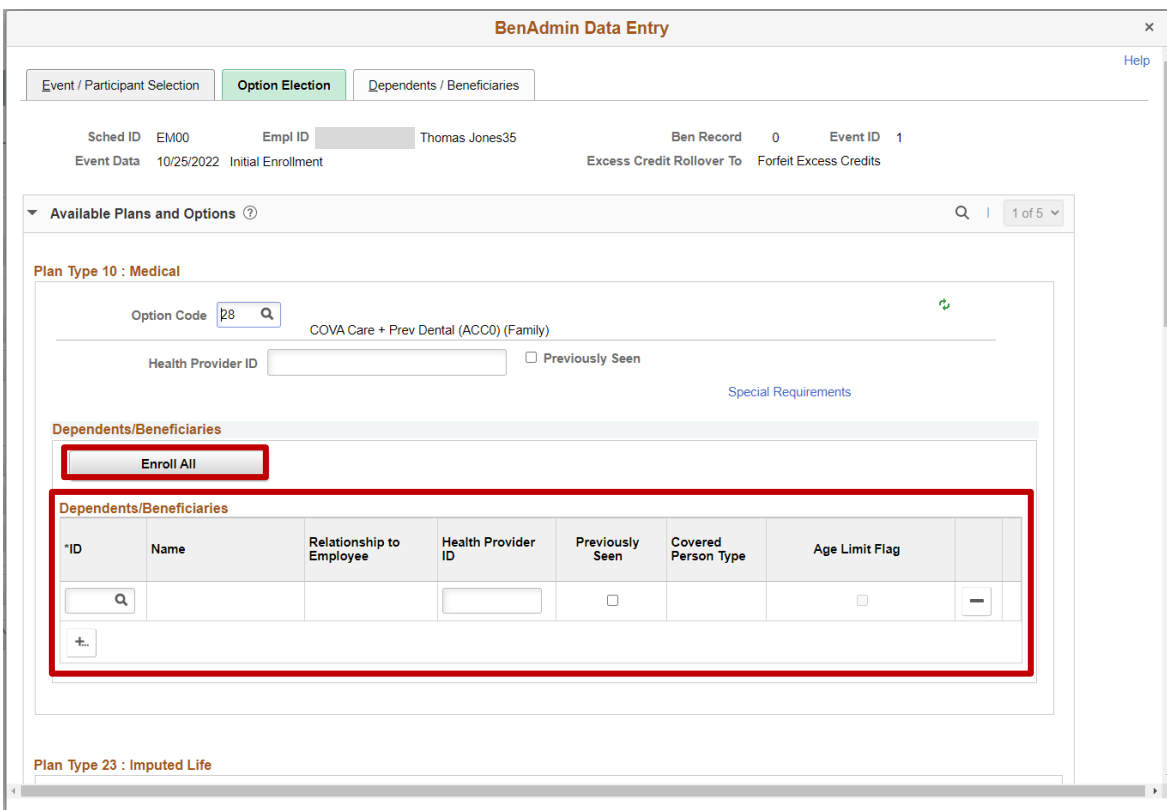


Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
[Redacted]	Spouse	Approved Dependent	05/03/1983
[Redacted]	Child	Approved Dependent	03/06/2019

**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 redisplay.



**BenAdmin Data Entry**

Event / Participant Selection **Option Election** Dependents / Beneficiaries

Sched ID EM00 Empl ID Thomas Jones35 Ben Record 0 Event ID 1  
Event Data 10/25/2022 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 5

**Plan Type 10 : Medical**

Option Code 28 COVA Care + Prev Dental (ACC0) (Family)  
Health Provider ID   Previously Seen  
[Special Requirements](#)

**Dependents/Beneficiaries**

**Enroll All**

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
<input type="text"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>

**Plan Type 23 : Imputed Life**

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.

**BenAdmin Data Entry**

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Event / Participant Selection
Option Election
Dependents / Beneficiaries
Help

Sched ID EM00    Empl ID   Thomas Jones35

Event Data 10/25/2022 Initial Enrollment

Ben Record 0    Event ID 1

Excess Credit Rollover To    Forfeit Excess Credits

**Available Plans and Options** 1 of 5

**Plan Type 10 : Medical**

Option Code  ↻

COVA Care + Prev Dental (ACC0) (Family)

Health Provider ID      Previously Seen

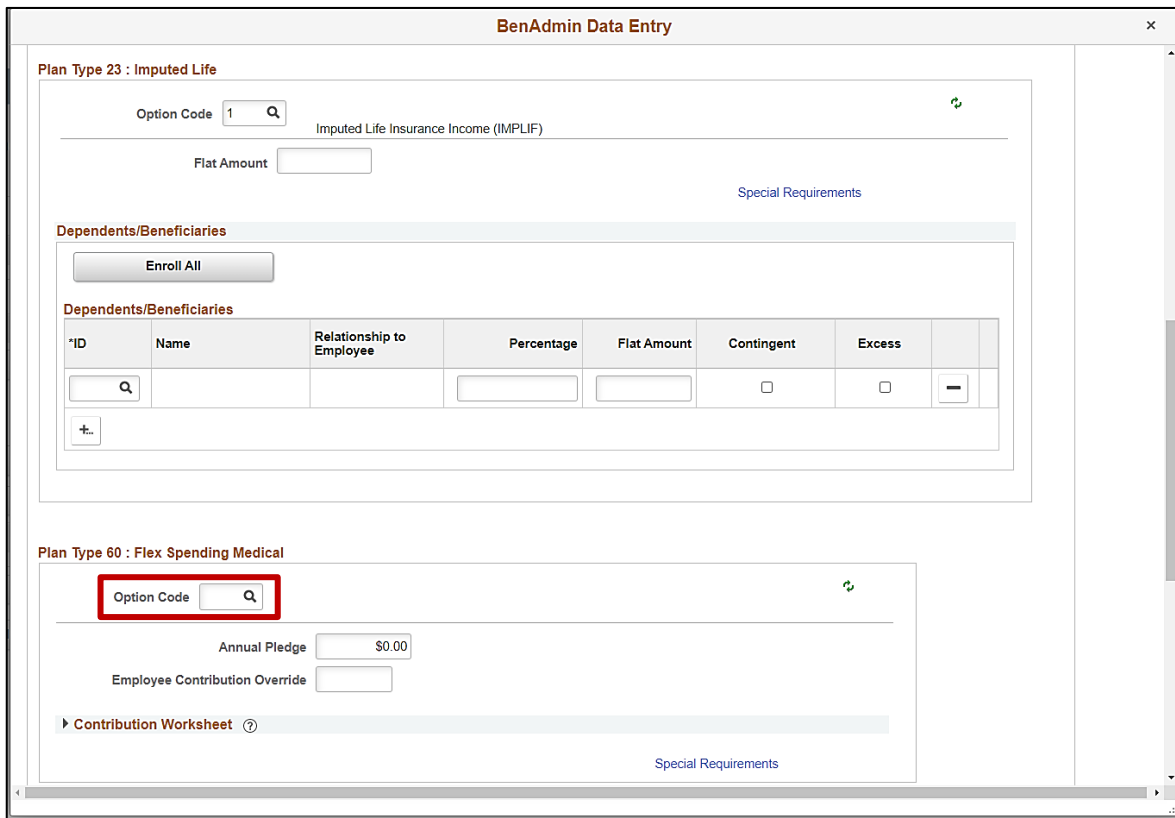
[Special Requirements](#)

**Dependents/Beneficiaries**

**Dependents/Beneficiaries**

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Wife Jones35	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	-
02	Child Jones35	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	-
<input type="button" value="+"/>							

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.



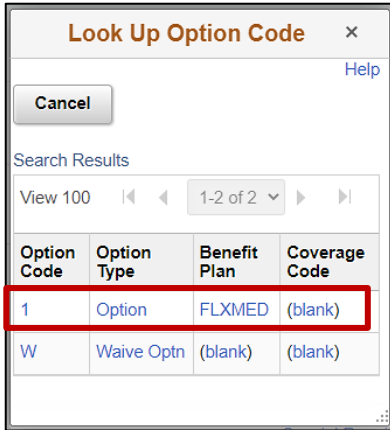
The screenshot shows the BenAdmin Data Entry interface. The top section is for Plan Type 23: Imputed Life, with an Option Code field containing '1' and a search icon. Below it is the Imputed Life Insurance Income (IMPLIF) section with a Flat Amount field and a Special Requirements link. The middle section is for Dependents/Beneficiaries, featuring an Enroll All button and a table with columns for ID, Name, Relationship to Employee, Percentage, Flat Amount, Contingent, and Excess. The bottom section is for Plan Type 60: Flex Spending Medical, with an Option Code field highlighted by a red box and a search icon. Below it are fields for Annual Pledge (set to \$0.00) and Employee Contribution Override, along with a Contribution Worksheet link and a Special Requirements link.

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.

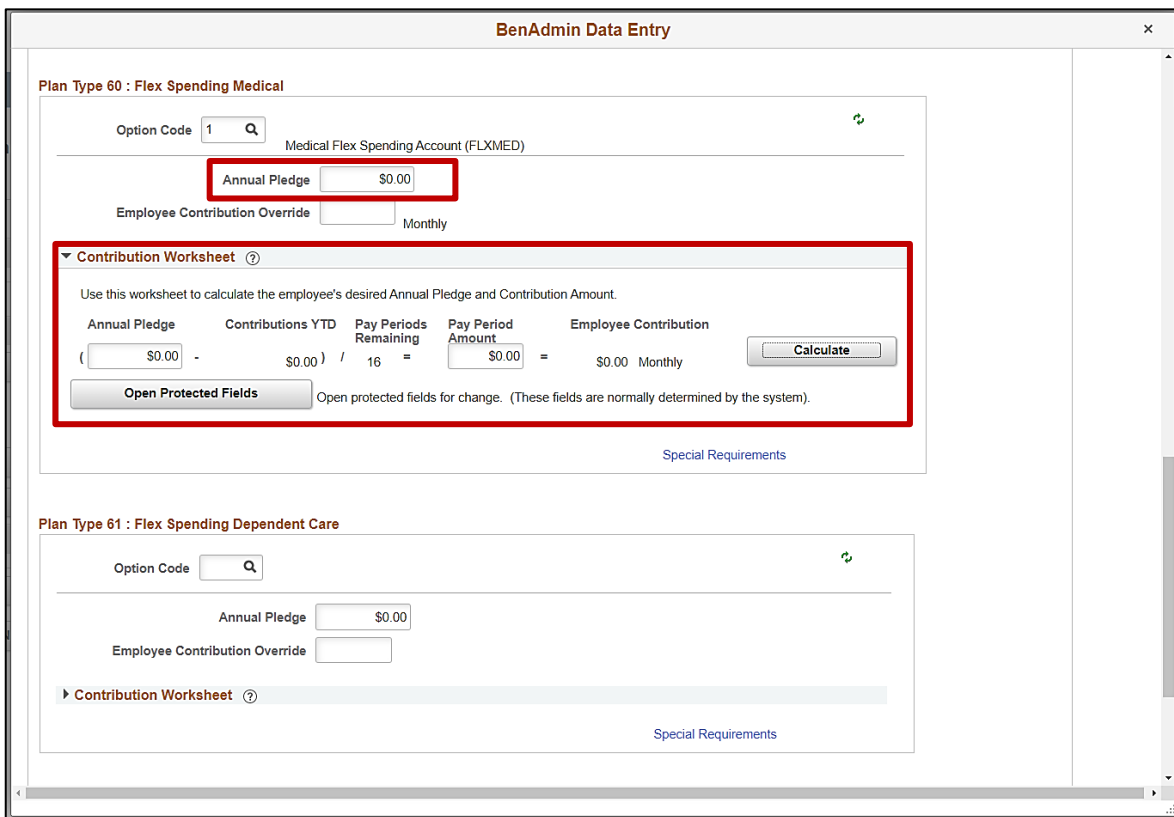
The **Look Up Option Code** page displays in a pop-up window.



Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	FLXMED	(blank)
W	Waive Optn	(blank)	(blank)

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

The **Option Election** tab redisplay



**Plan Type 60 : Flex Spending Medical**

Option Code: 1

Medical Flex Spending Account (FLXMED)

Annual Pledge:

Employee Contribution Override:  Monthly

**Contribution Worksheet**

Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
( <input type="text" value="\$0.00"/> - <input type="text" value="\$0.00"/> ) / 16 = <input type="text" value="\$0.00"/> = \$0.00 Monthly				

Open protected fields for change. (These fields are normally determined by the system).

[Special Requirements](#)

**Plan Type 61 : Flex Spending Dependent Care**

Option Code:

Annual Pledge:

Employee Contribution Override:

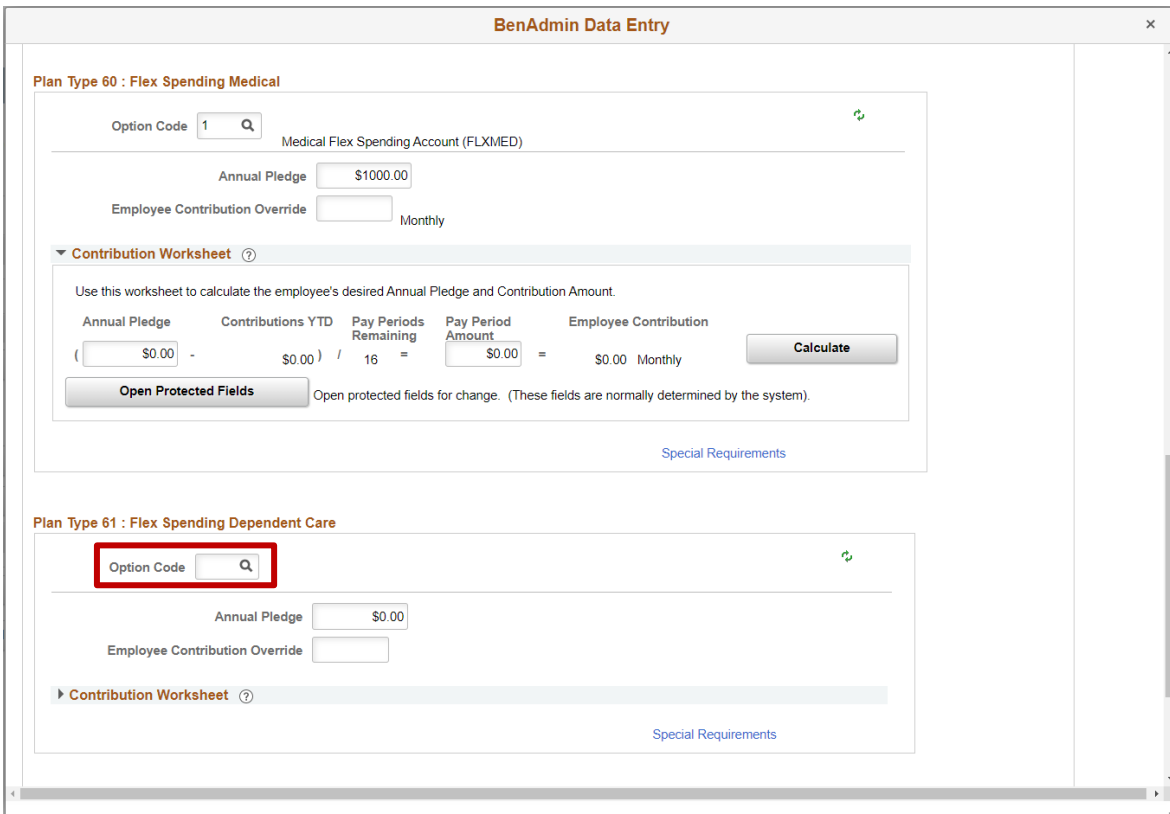
**Contribution Worksheet**

[Special Requirements](#)

**BN361\_Completing a New Hire Enrollment**

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.



The screenshot shows the BenAdmin Data Entry interface. The top section is for Plan Type 60: Flex Spending Medical. It includes an Option Code field with the value '1', a search icon, and a refresh icon. Below this is the text 'Medical Flex Spending Account (FLXMED)'. The Annual Pledge field is set to '\$1000.00'. The Employee Contribution Override field is empty, and the frequency is set to 'Monthly'. A Contribution Worksheet section is expanded, showing a calculation: Annual Pledge (\$0.00) minus Contributions YTD (\$0.00) divided by Pay Periods Remaining (16) equals Pay Period Amount (\$0.00), which equals Employee Contribution (\$0.00 Monthly). There is a 'Calculate' button and an 'Open Protected Fields' button. A 'Special Requirements' link is at the bottom.

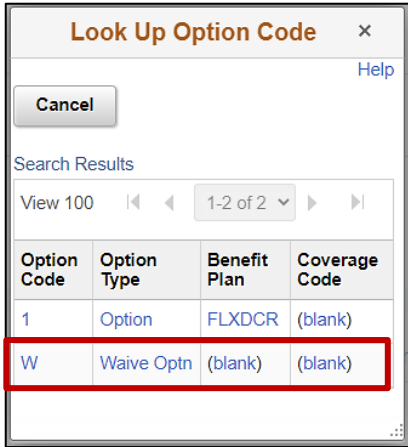
The bottom section is for Plan Type 61: Flex Spending Dependent Care. It includes an Option Code field with a search icon, highlighted by a red box. Below this is the text 'Flex Spending Dependent Care'. The Annual Pledge field is set to '\$0.00'. The Employee Contribution Override field is empty. A Contribution Worksheet section is collapsed. A 'Special Requirements' link is at the bottom.

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.

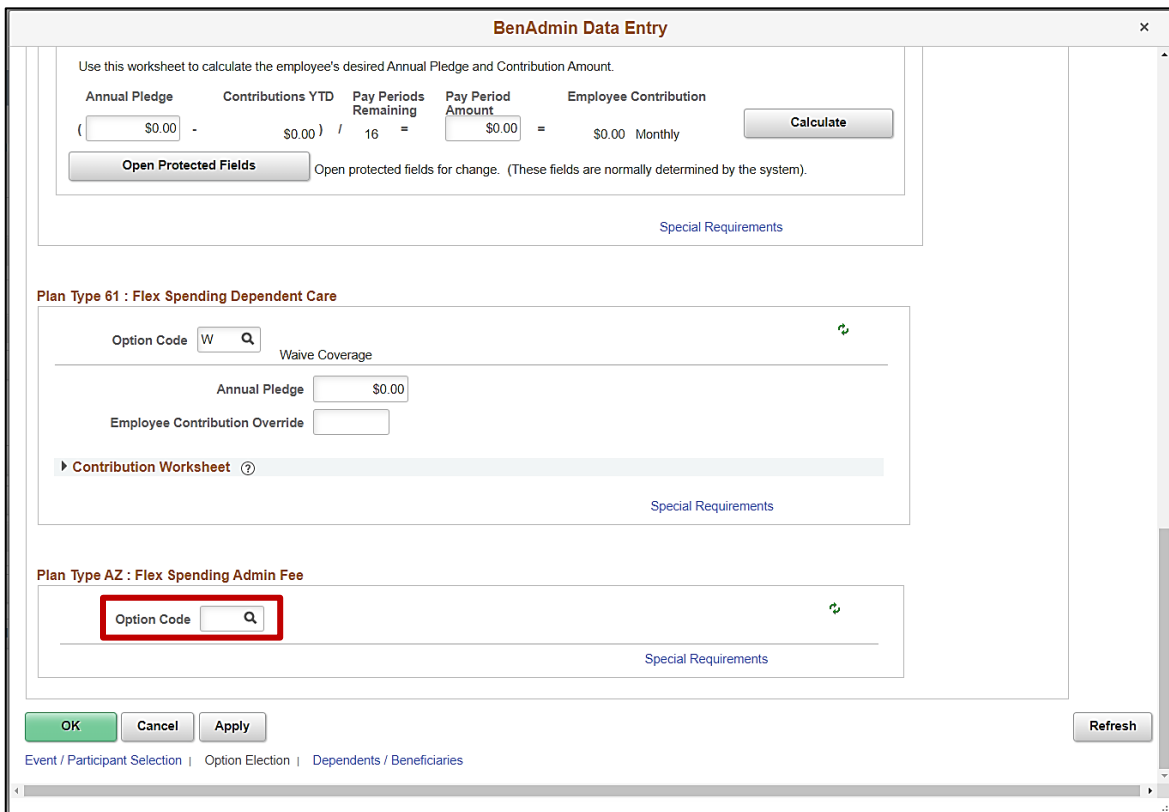


The **Look Up Option Code** page displays in a pop-up window.



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

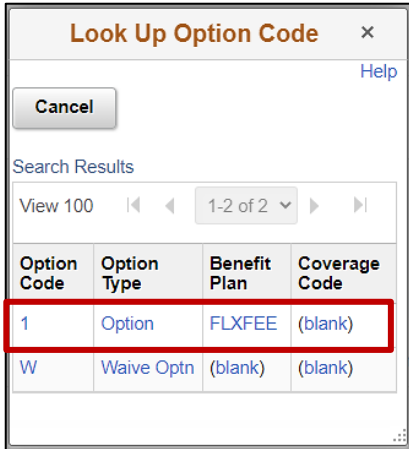
The **Option Election** tab redisplay.



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.

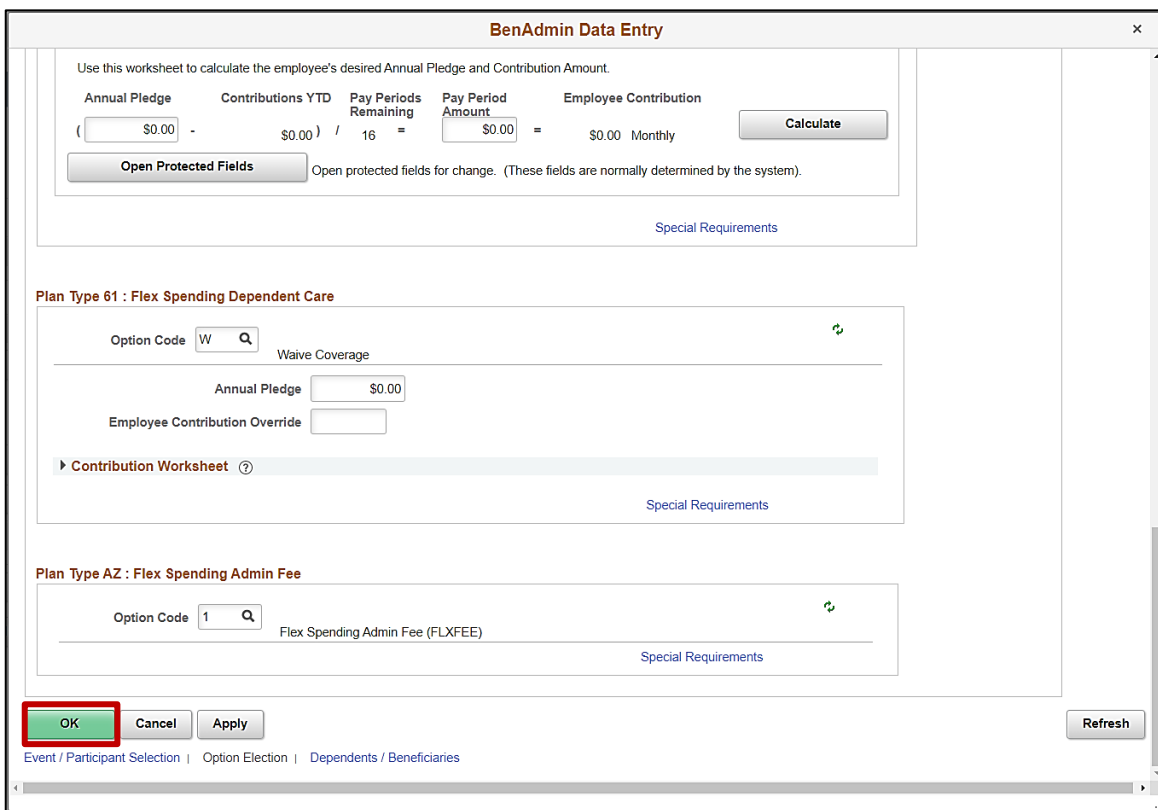
The **Look Up Option Code** page displays in a pop-up window.



Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	FLXFEE	(blank)
W	Waive Optn	(blank)	(blank)

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

The **Option Election** tab redisplay.



Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
( \$0.00 ) -	\$0.00 ) /	16 =	\$0.00 =	\$0.00 Monthly

**Plan Type 61 : Flex Spending Dependent Care**

Option Code: W Waive Coverage

Annual Pledge: \$0.00

Employee Contribution Override: [ ]

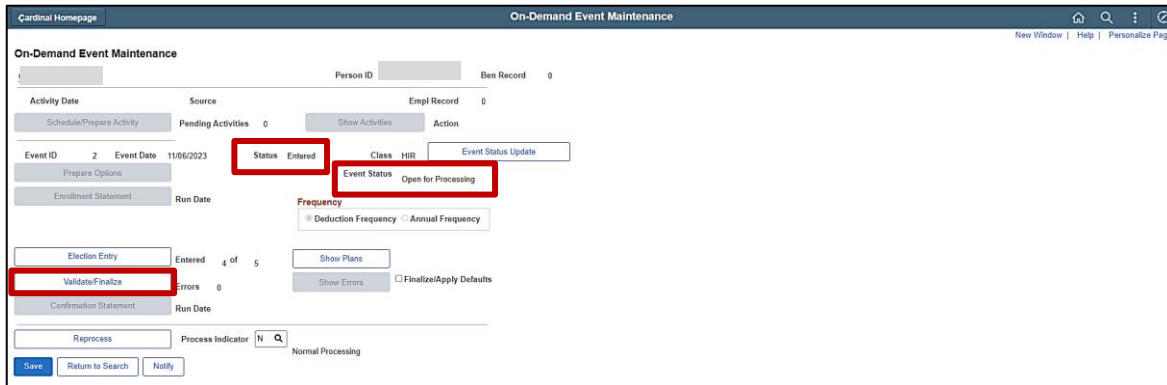
**Plan Type AZ : Flex Spending Admin Fee**

Option Code: 1 Flex Spending Admin Fee (FLXFEE)

**OK** Cancel Apply Refresh

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

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



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

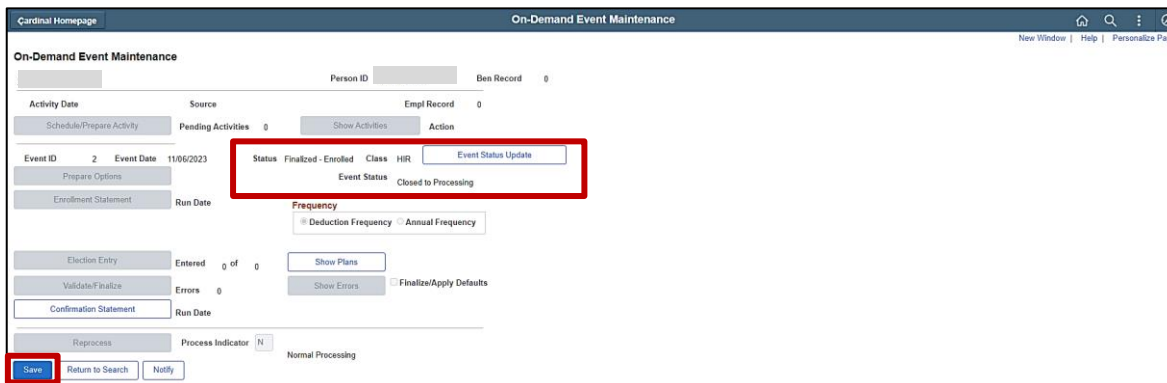
52. Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

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



53. Click the **OK** button.

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



**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.