



Employee Self-Service Job Aid

ESS_How to Update Dependent Information

Topic Overview

The purpose of this Job Aid is to walk through the process on how to view, add, and update dependent information in Cardinal using Employee Self-Service.

Note: All dependents, regardless of whether they are currently enrolled in a Benefits Plan, will display and be available to view on the **Dependent/Beneficiary Info** page. This data is maintained within Cardinal for cases where the dependent may need to be re-enrolled in a Benefits Plan in the future.

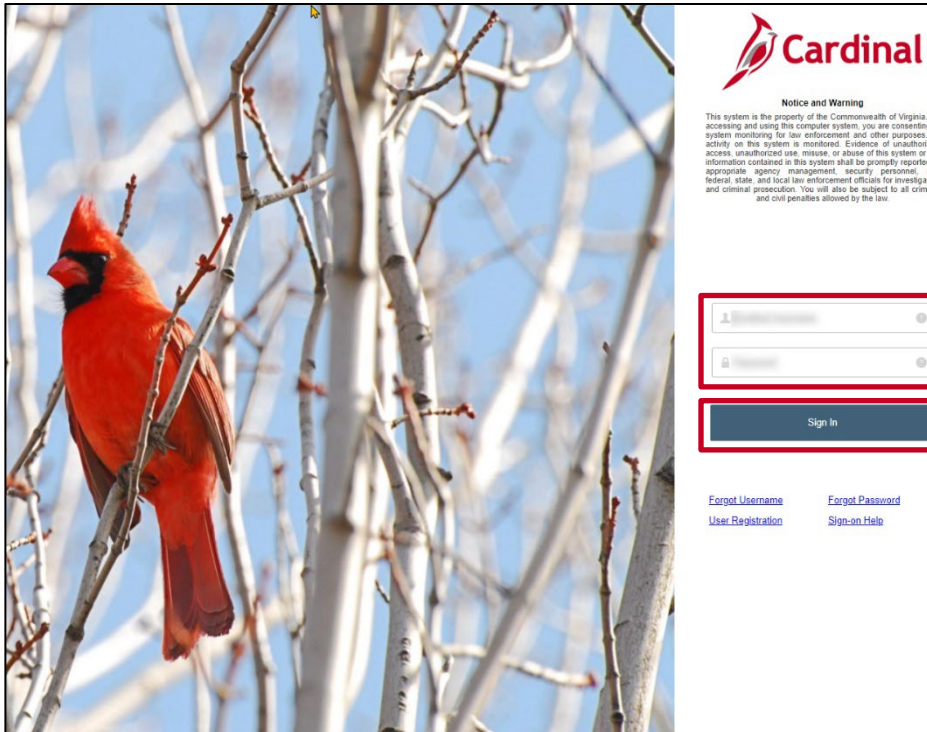
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Updating Dependent Information

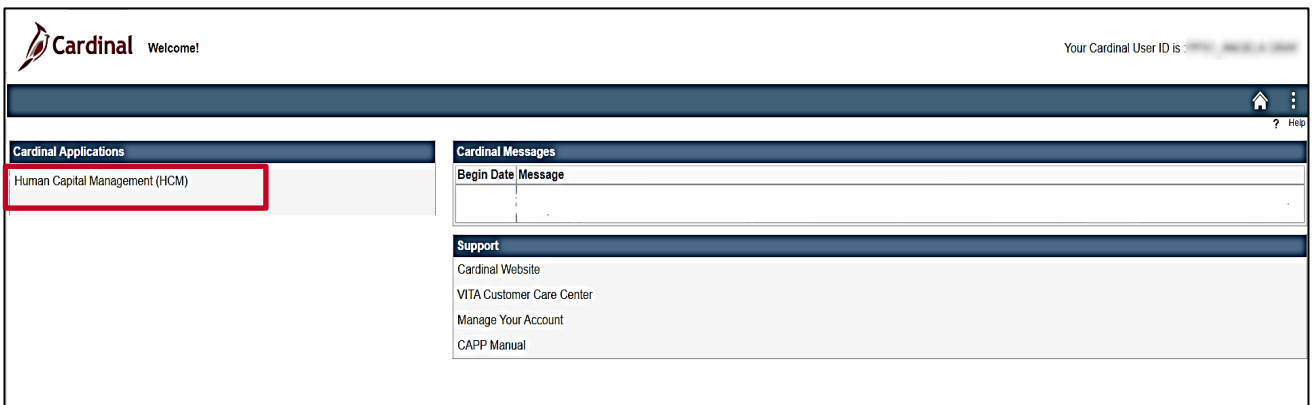
1. Log into Cardinal (my.cardinal.virginia.gov).

Note: For more information about Cardinal registration, see the Job Aid titled **Cardinal Registration Quick Start Guide**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.



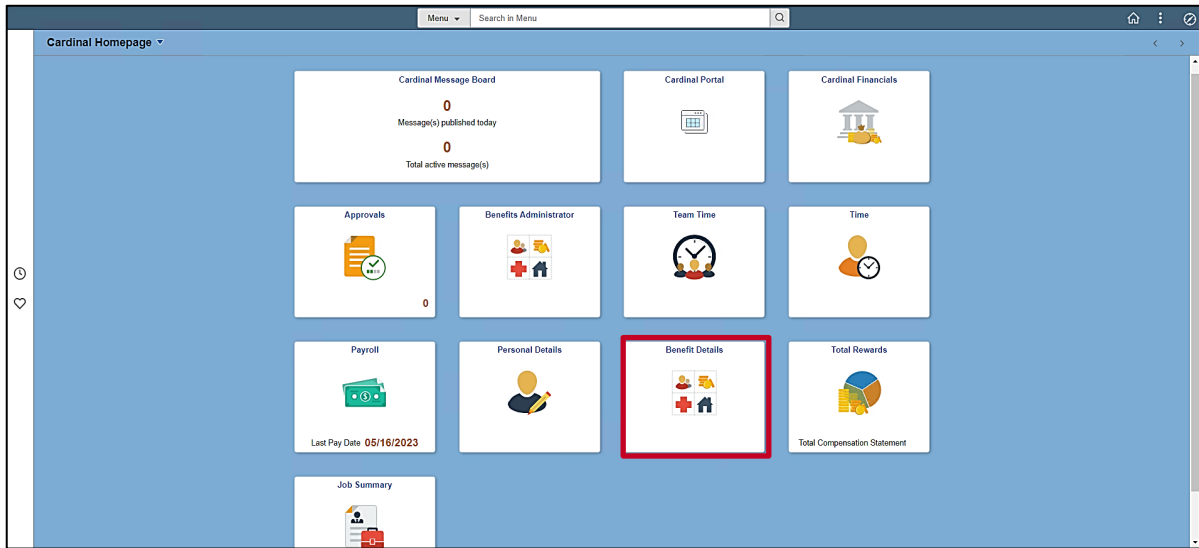
2. Enter your **User ID** and **Password**.
3. Click the **Sign In** button.

The **Portal Welcome** page displays.



4. Click the **Human Capital Management** link.
5. Navigate to the **Cardinal Homepage**.

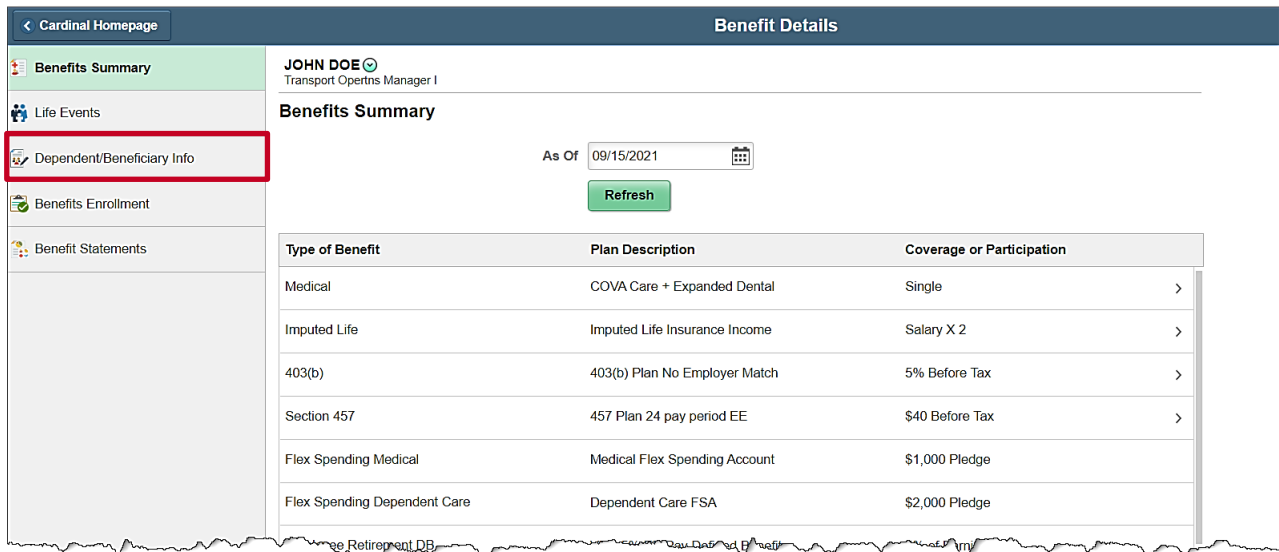
The **Cardinal Homepage** displays.



Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

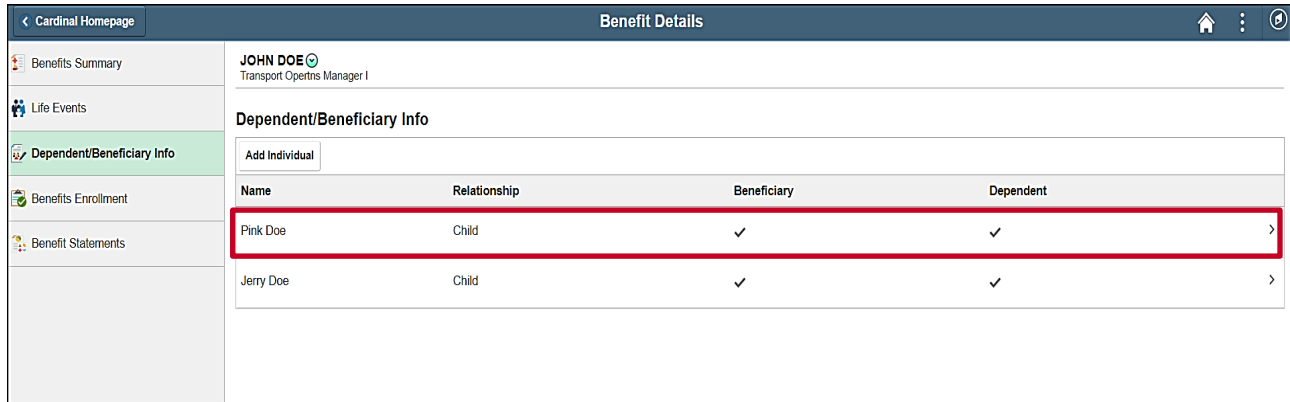
- Click the **Benefit Details** tile.

The **Benefits Details** page displays with the **Benefits Summary** tab displayed by default.



- Click **Dependent/Beneficiary Info** list item to view associated dependent/beneficiary information.

The **Dependent/Beneficiary Info** page displays.

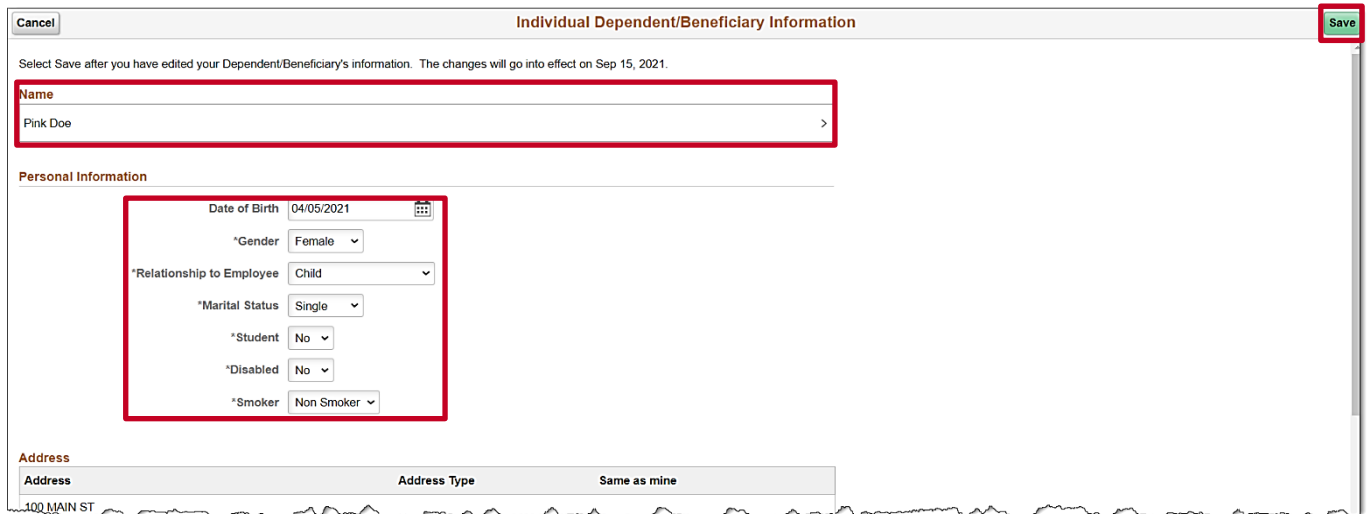


Name	Relationship	Beneficiary	Dependent
Pink Doe	Child	✓	✓
Jerry Doe	Child	✓	✓

8. Click on the corresponding row to view or edit the information for a listed dependent.

Note: Information updates initiated from this page do not influence benefit enrollment selection(s). Updates performed only update the personal information for the specific dependent in Cardinal. If a Dependent(s) needs to be added, the employee must do so through a Life Event.

The **Individual Dependent/Beneficiary Information** page displays for the corresponding dependent.



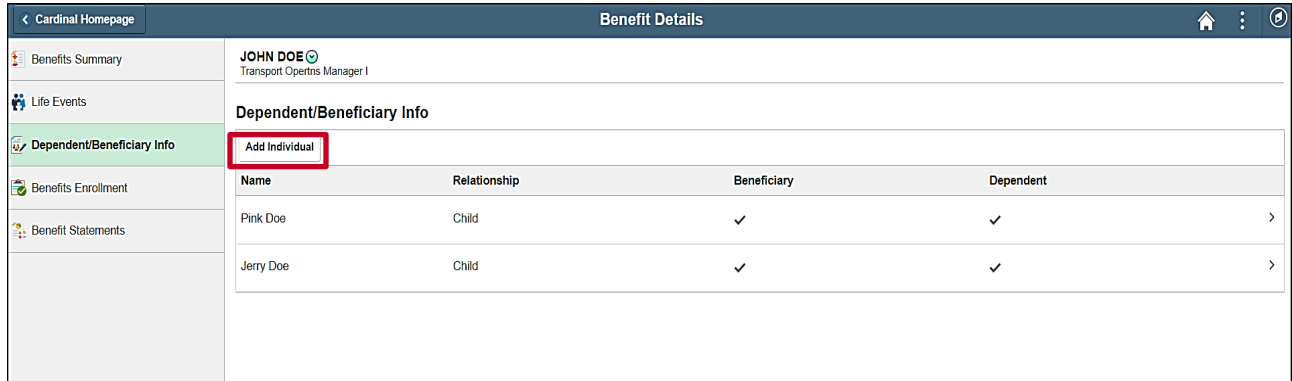
9. Review the information and make updates as desired/needed. The fields that can be updated include:

- a. **Name Change**
- b. **Marital Status**
- c. **If the Dependent is a student**
- d. **If the Dependent has a Disability**
- e. **Smoker or Non-Smoker**
- f. **Change in Address**
- g. **Change/Add a Phone Number**
- h. **Change/Add an Email**

10. Once all updates are complete, click the **Save** button.

Note: The Benefits Administrator will be notified when changes are made to a dependent’s profile and will inform the employee if the change impacts current benefits enrollment and/or if additional documentation is needed.

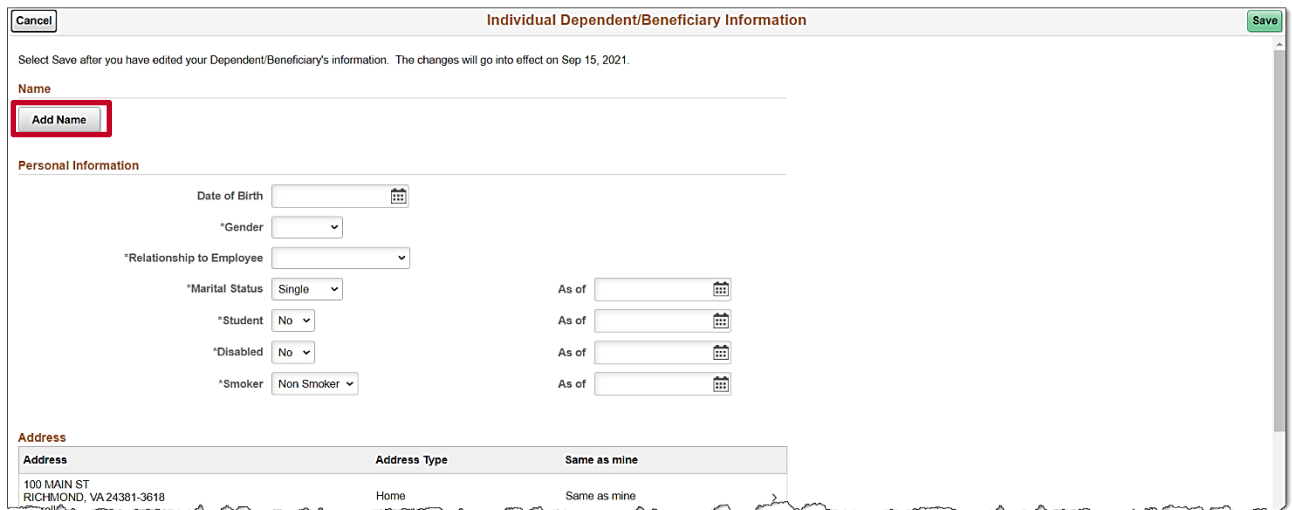
The **Dependent/Beneficiary Info** page returns.



Name	Relationship	Beneficiary	Dependent
Pink Doe	Child	✓	✓
Jerry Doe	Child	✓	✓

11. To add a dependent, click the **Add Individual** button.

A blank **Individual Dependent/Beneficiary Information** page displays.



Individual Dependent/Beneficiary Information

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Sep 15, 2021.

Name

Add Name

Personal Information

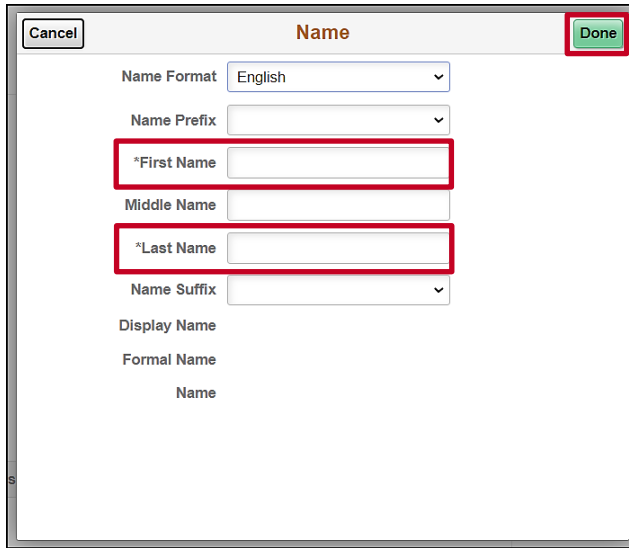
Date of Birth: [Date Picker]
 *Gender: [Dropdown]
 *Relationship to Employee: [Dropdown]
 *Marital Status: Single [Dropdown] As of: [Date Picker]
 *Student: No [Dropdown] As of: [Date Picker]
 *Disabled: No [Dropdown] As of: [Date Picker]
 *Smoker: Non Smoker [Dropdown] As of: [Date Picker]

Address

Address	Address Type	Same as mine
100 MAIN ST RICHMOND, VA 24381-3618	Home	Same as mine

12. Click the **Add Name** button.

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

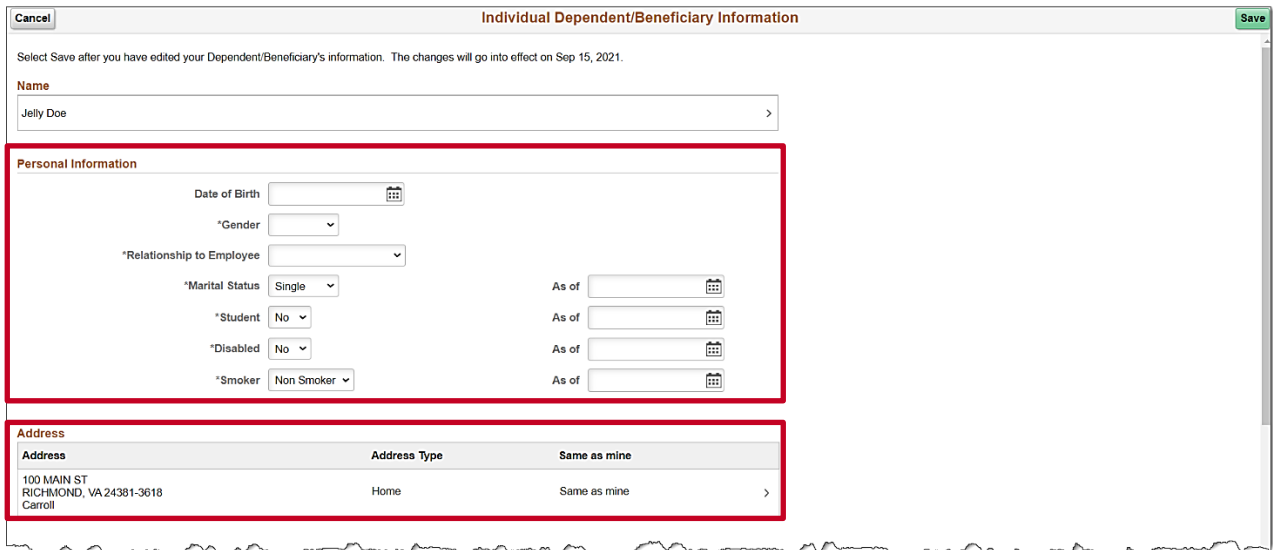


13. Enter the **First Name** and **Last Name** for the dependent.

Note: Optionally add the dependent's name prefix, middle name or name suffix, as applicable.

14. Click the **Done** button.

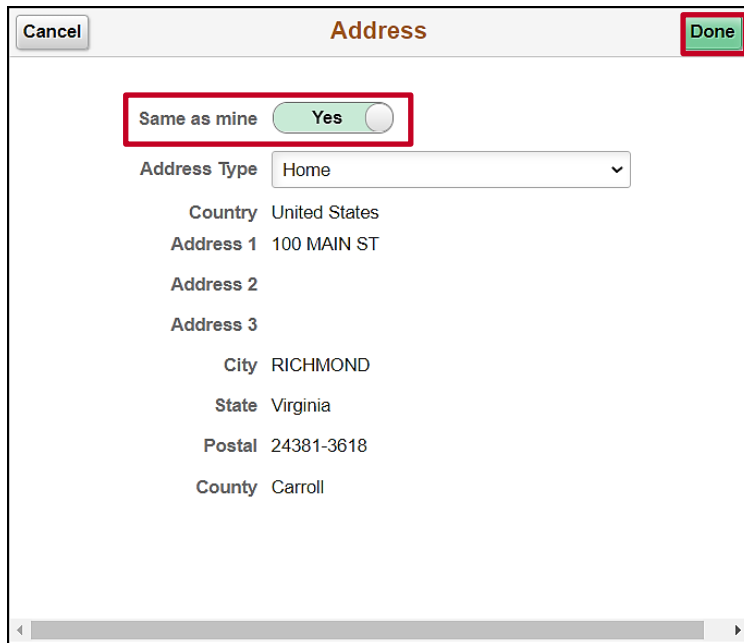
The **Individual Dependent/Beneficiary Information** page returns.



15. Within the **Personal Information** section, complete the **Date of Birth**, **Gender**, and **Relationship to Employee** fields.

16. Click on the **Address** listed.

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

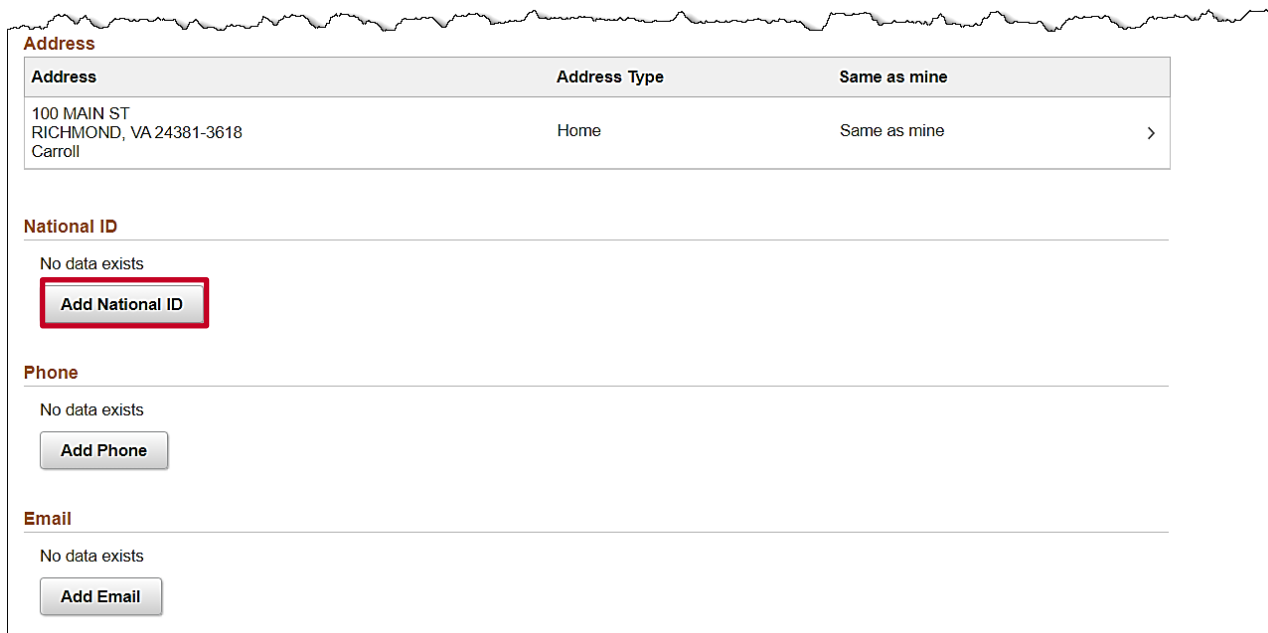


The screenshot shows a pop-up window titled "Address". At the top left is a "Cancel" button and at the top right is a "Done" button. Below the title bar, there is a "Same as mine" label followed by a radio button labeled "Yes", which is selected. Below this is an "Address Type" dropdown menu set to "Home". The address details are as follows:

- Country: United States
- Address 1: 100 MAIN ST
- Address 2:
- Address 3:
- City: RICHMOND
- State: Virginia
- Postal: 24381-3618
- County: Carroll

17. If the dependent's address is the same as yours, leave the defaulted **Same as Mine** address. If the dependent resides at a different address, uncheck the **Same as Mine** button and enter the dependent's address.
18. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.



The screenshot shows the "Individual Dependent/Beneficiary Information" page. It has a header "Address" and a table with the following data:

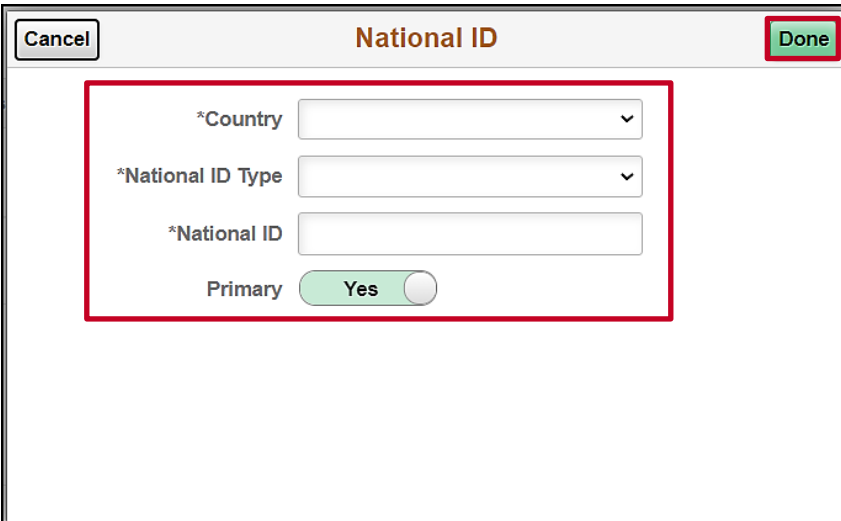
Address	Address Type	Same as mine
100 MAIN ST RICHMOND, VA 24381-3618 Carroll	Home	Same as mine >

Below the table, there are three sections:

- National ID**: "No data exists" with an "Add National ID" button highlighted by a red box.
- Phone**: "No data exists" with an "Add Phone" button.
- Email**: "No data exists" with an "Add Email" button.

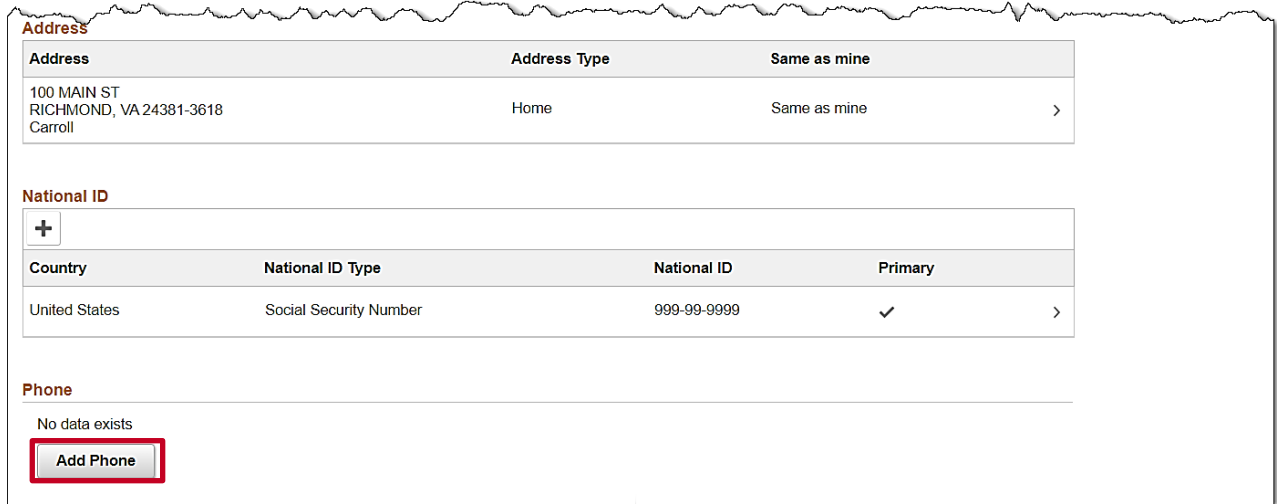
19. Click the **Add National ID** button.

The **National ID** page displays in a pop-up window.



20. Complete the **Country**, **National ID Type**, and **National ID** fields for the dependent.
21. Click the **Done** button.

The **Individual Dependent/Beneficiary** Information page returns.



Address	Address Type	Same as mine
100 MAIN ST RICHMOND, VA 24381-3618 Carroll	Home	Same as mine >

Country	National ID Type	National ID	Primary
United States	Social Security Number	999-99-9999	✓ >

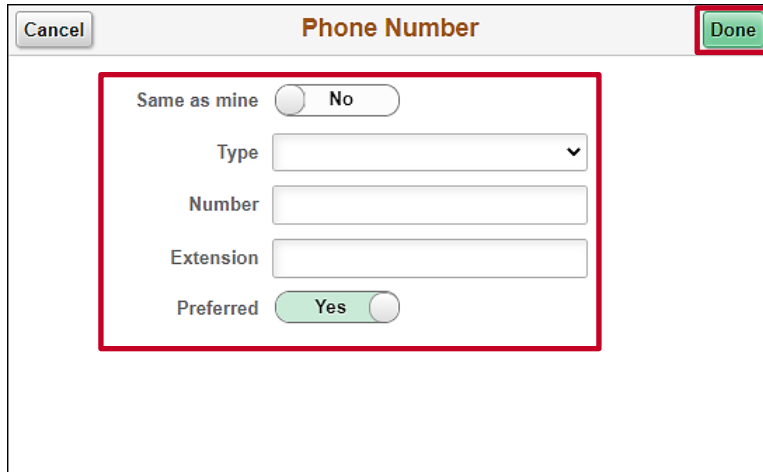
Phone

No data exists

Add Phone

22. Click the **Add Phone** button.

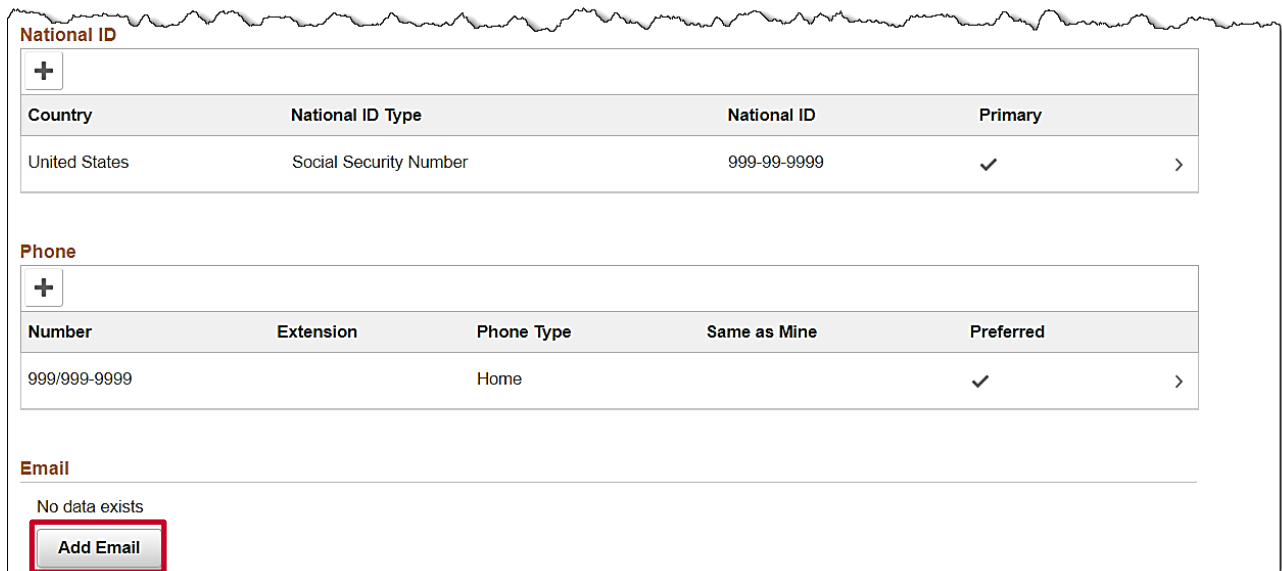
The **Phone Number** page displays in a pop-up window.



23. Enter/select the appropriate information in the corresponding fields.

24. Click the **Done** button.

The **Individual Dependent/Beneficiary Information** page returns.



National ID			
Country	National ID Type	National ID	Primary
United States	Social Security Number	999-99-9999	✓

Phone				
Number	Extension	Phone Type	Same as Mine	Preferred
999/999-9999		Home	✓	✓

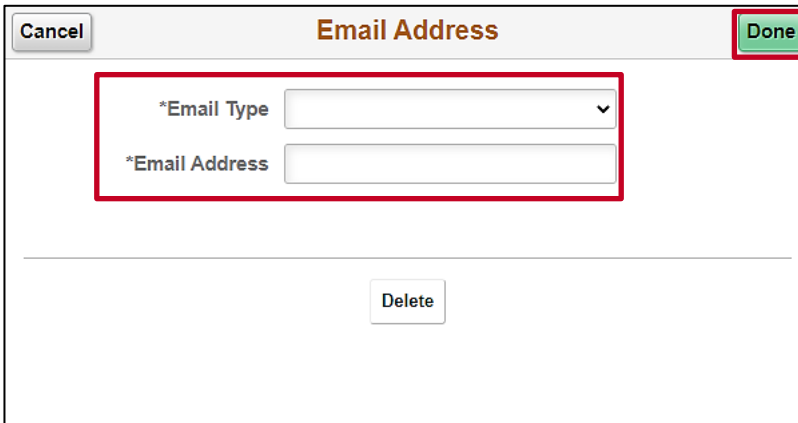
Email

No data exists

Add Email

25. Click the **Add Email** button.

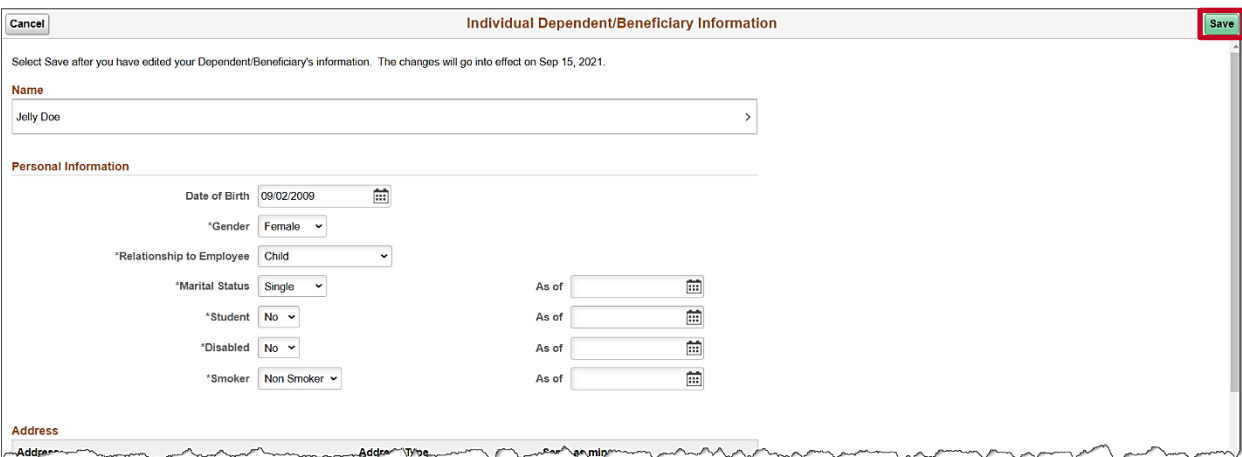
The **Email Address** page displays in a pop-up window.



26. Select the applicable **Email Type** and enter the applicable **Email Address**.

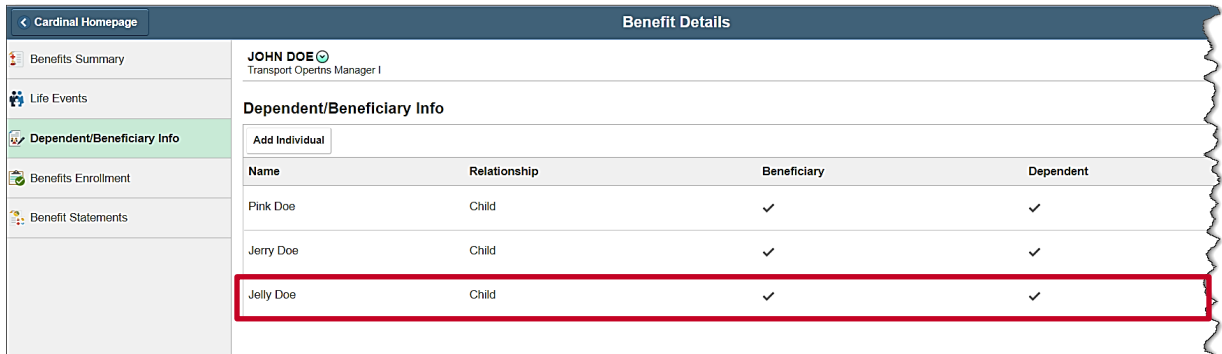
27. Click **Done**.

The **Individual Dependent/Beneficiary Information** page returns.



28. Click the **Save** button.

The **Dependent/Beneficiary Info** page return with the new dependent listed.



Cardinal Homepage		Benefit Details	
Benefits Summary	JOHN DOE Transport Operator Manager I		
Life Events	Dependent/Beneficiary Info		
Dependent/Beneficiary Info	Add Individual		
Benefits Enrollment	Name	Relationship	Beneficiary
Benefit Statements	Pink Doe	Child	✓
	Jerry Doe	Child	✓
	Jelly Doe	Child	✓

Note: Adding a dependent through Employee Self-Service only creates a profile for that Dependent in Cardinal. It does not affect benefit enrollment, nor does it get reported to the vendor. In addition, the dependent's information added on the **Dependent/Beneficiary Info** page does not populate as a possible **Emergency Contact** in the **Personal Details** page.