

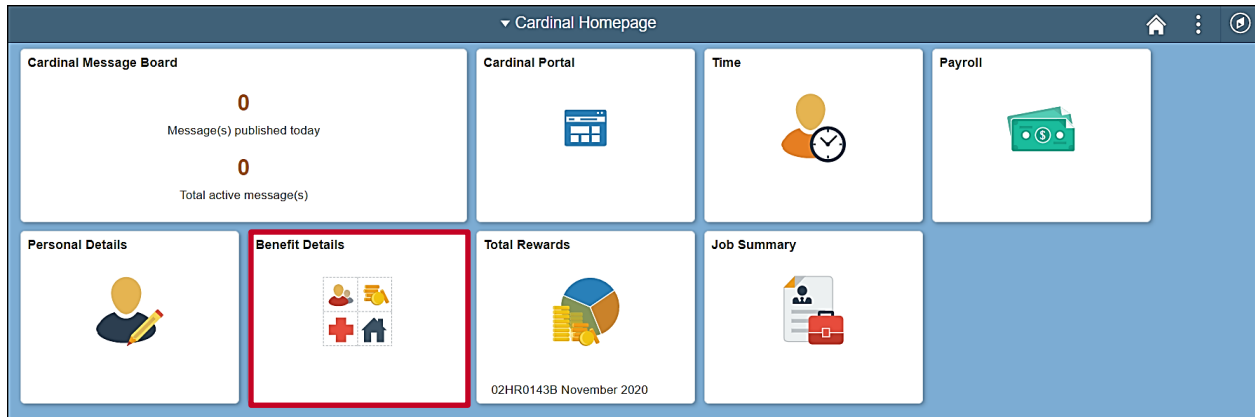


**Enrollment Steps for an Employee Overview**

This Job Aid provides a walkthrough of the enrollment steps for an employee through both New Hire and Open Enrollment processes in Cardinal Employee Self-Service.

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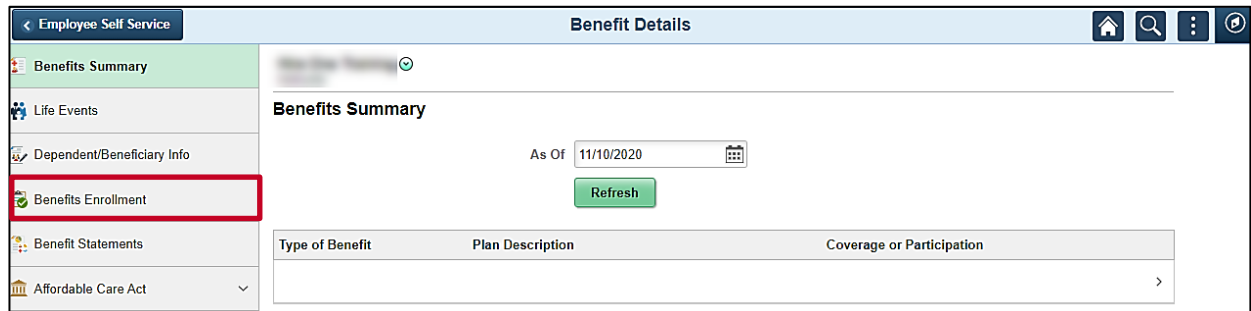
**Benefit Enrollment (New Hire)**

- 1.
2. Navigate to the **Benefit Details** page using the following path:

**Homepage > Benefit Details tile**

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

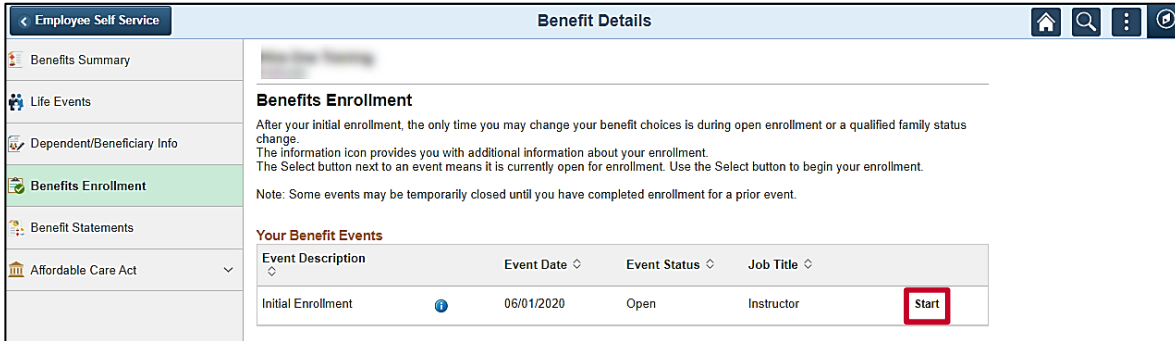
The **Benefit Details** page displays.



3. Click the **Benefits Enrollment** list item on the left-hand side of the screen.

**BN361 Enrollment Steps for an Employee**

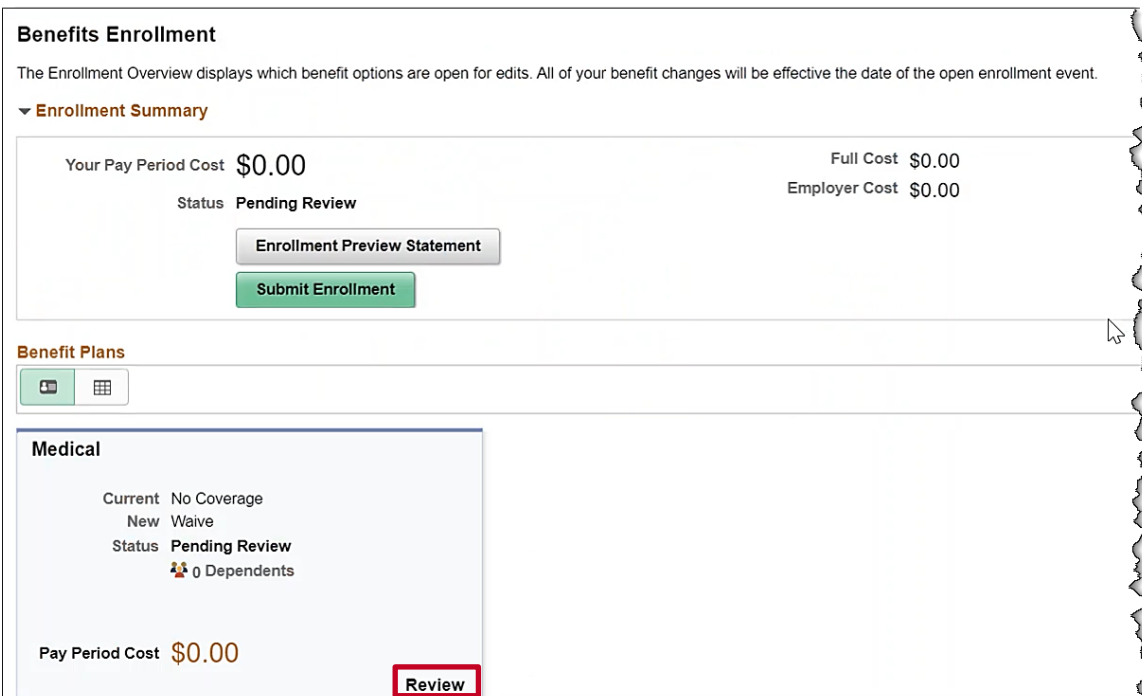
The **Benefit Details** page refreshes with the **Benefits Enrollment** information.



4. Click the **Start** button.

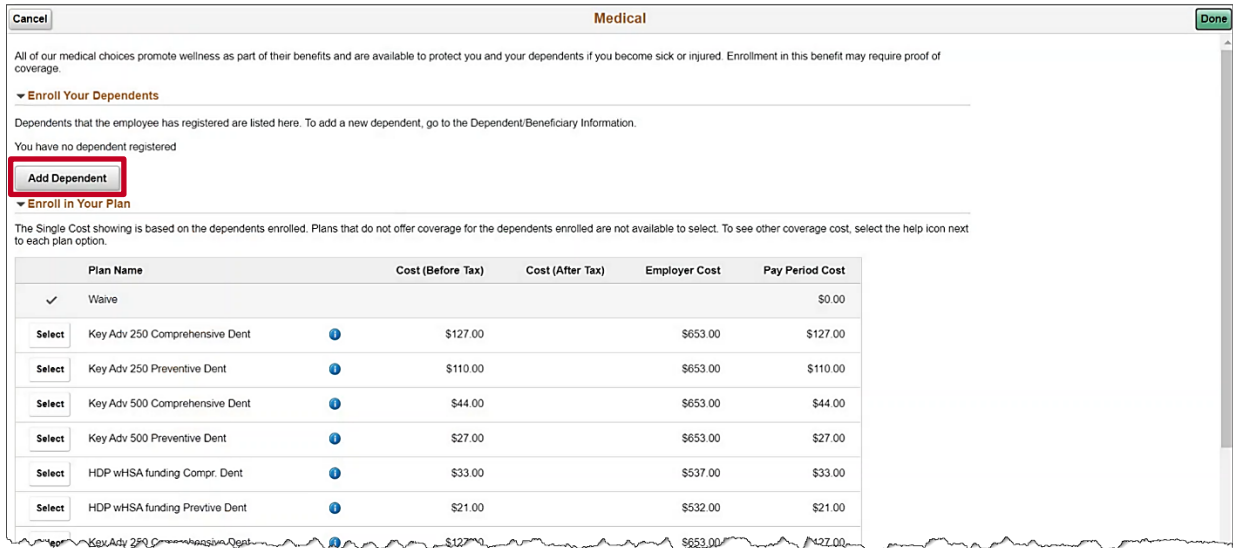
The **Benefits Enrollment** page displays.

**Note:** The Benefit Plans available on this screen depend on the employee's benefits eligibility (i.e., if the employee is eligible for FSA Medical, a tile for FSA Medical would appear on this screen.)



5. Click the **Review** link within the **Medical** Tile to begin the enrollment process.

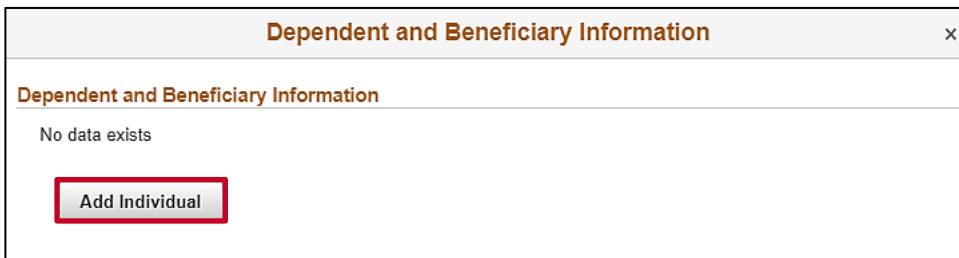
The **Medical** page displays.



**Note:** Employees can add dependents and select medical coverage on this page.

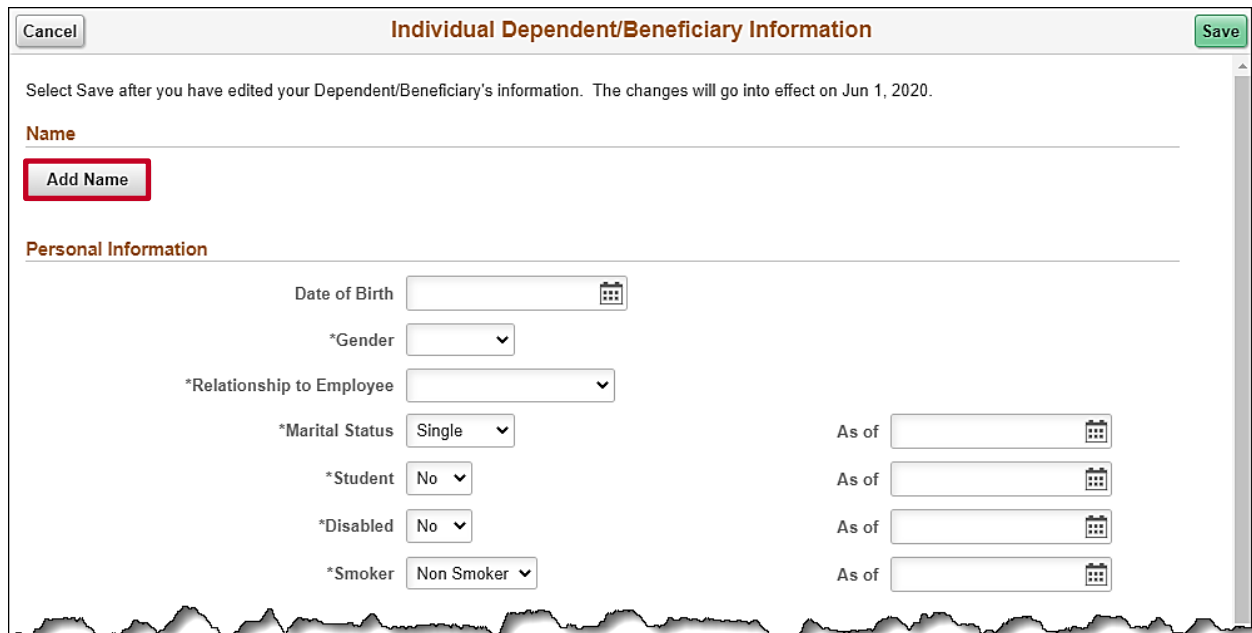
- Click the **Add Dependent** button.

The **Dependent and Beneficiary Information** page displays (in this example, there are no dependents currently listed for the employee).



- Click the **Add Individual** button to add a dependent to the Employee Record.

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



**Individual Dependent/Beneficiary Information**

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Jun 1, 2020.

**Name**

**Add Name**

**Personal Information**

Date of Birth

\*Gender

\*Relationship to Employee

\*Marital Status  Single  As of

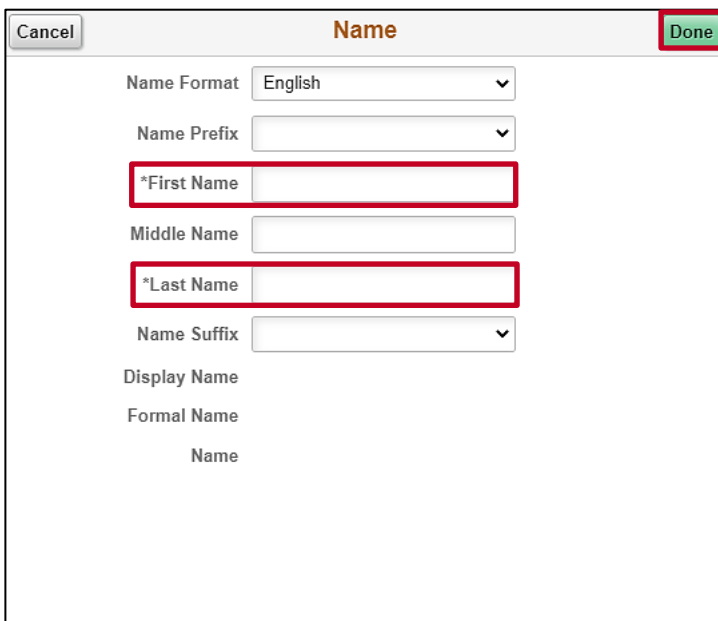
\*Student  No  As of

\*Disabled  No  As of

\*Smoker  Non Smoker  As of

8. Click the **Add Name** button.

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



**Name**

Name Format  English

Name Prefix

\*First Name

Middle Name

\*Last Name

Name Suffix

Display Name

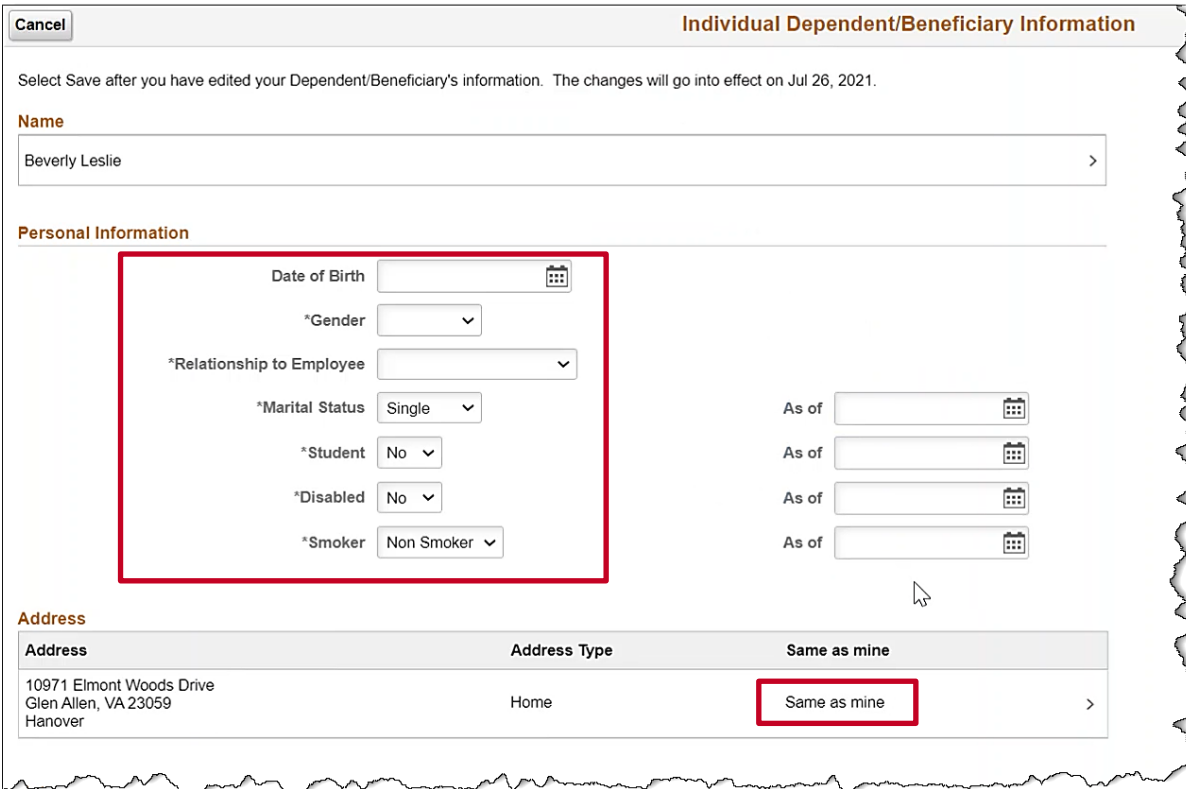
Formal Name

Name

9. Enter the dependent's name information. The **First Name** and **Last Name** fields are required.

10. Click the **Done** button.

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




**Individual Dependent/Beneficiary Information**

Select Save after you have edited your Dependent/Beneficiary's information. The changes will go into effect on Jul 26, 2021.

**Name**

Beverly Leslie

**Personal Information**

Date of Birth  

\*Gender


\*Relationship to Employee


\*Marital Status  Single


\*Student  No


\*Disabled  No

\*Smoker  Non Smoker

As of  

As of  

As of  

As of  

**Address**

Address	Address Type	Same as mine
10971 Elmont Woods Drive Glen Allen, VA 23059 Hanover	Home	<input type="text"/> Same as mine

11. Input the dependent's date of birth in the **Date of Birth** field or select the appropriate Date of Birth using the **Date of Birth Calendar** icon.
12. Select the dependent's appropriate gender from the **Gender** drop-down list.
13. Select the dependent's appropriate relationship using the **Relationship to Employee** drop-down list.
14. Select the dependent's appropriate marital status using the **Marital Status** drop-down list.
15. Verify the **Address** section is set to **Same as mine**.
16. Scroll down to the **National ID** section and click on the **Add National ID** button.

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

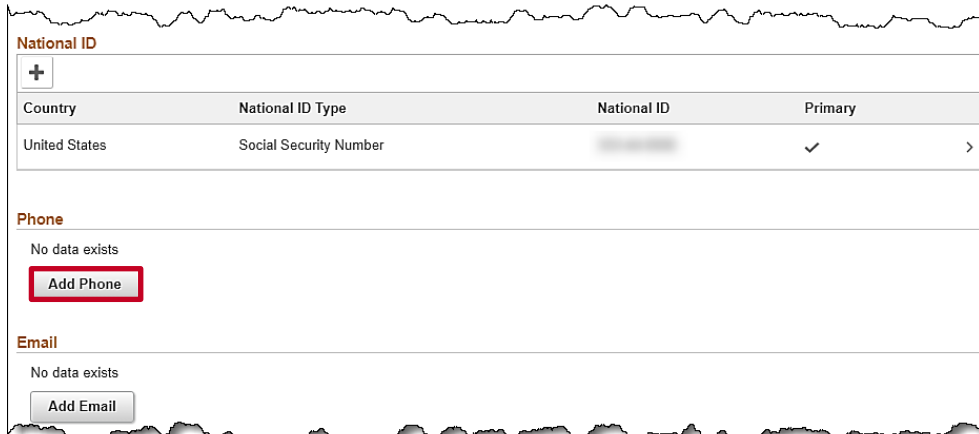


The screenshot shows a form titled "National ID" with a "Cancel" button on the left and a "Done" button on the right. The form contains the following fields:

- \*Country: A dropdown menu.
- \*National ID Type: A dropdown menu.
- \*National ID: A text input field.
- Primary: A toggle switch currently set to "Yes".

17. Complete the **Country**, **National ID Type**, and **National ID** fields for the dependent.
18. 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	[REDACTED]	✓

**Phone**

No data exists

**Add Phone**

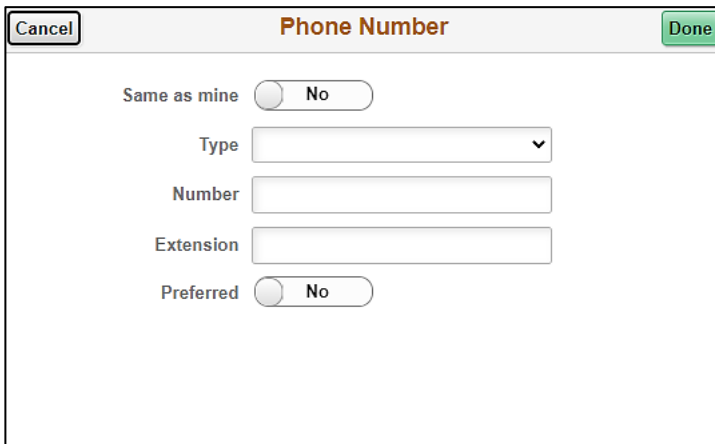
**Email**

No data exists

**Add Email**

19. Click the **Add Phone** button.

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



**Phone Number**

Same as mine  No

Type

Number

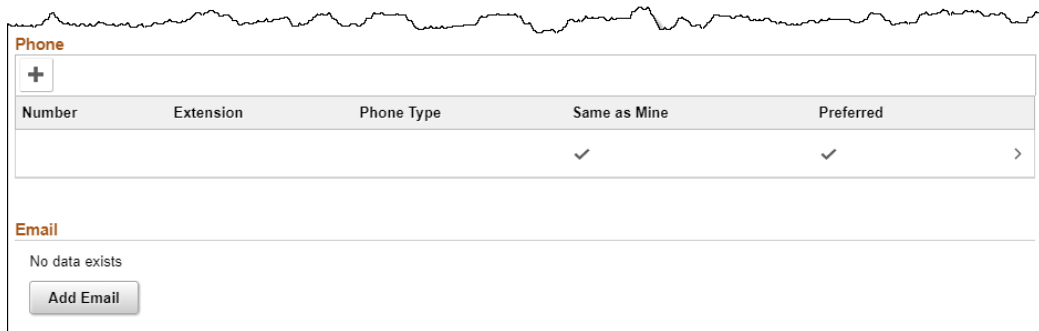
Extension

Preferred  No

20. Select “Yes” for the **Same as Mine** field or complete the fields, as applicable.

21. Click the **Done** button.

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



**Phone**

Number	Extension	Phone Type	Same as Mine	Preferred
			✓	✓

**Email**

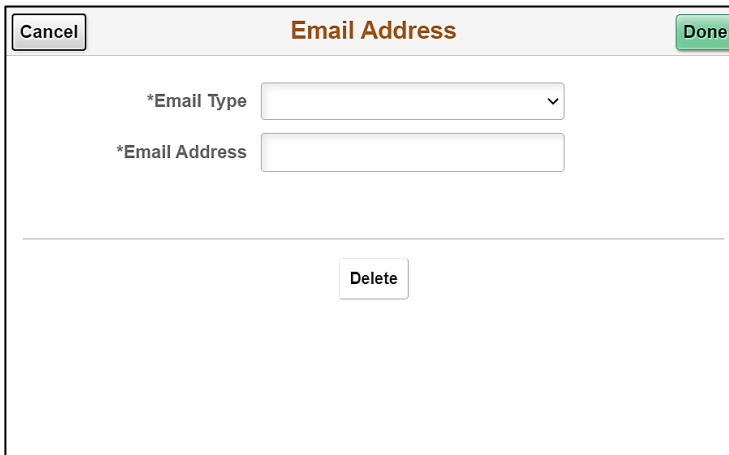
No data exists

**Add Email**



22. Click the **Add Email** button.

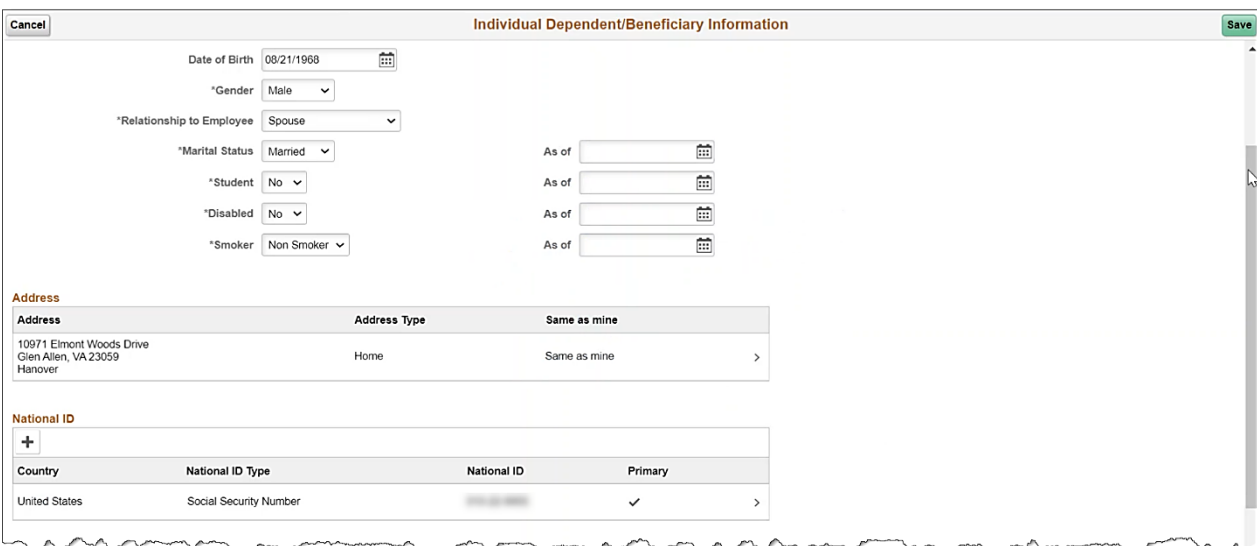
The **Email Address** page displays in a pop-up window.



23. Select the Email Type from the **Email Type** drop-down list and enter the applicable Email Address in the **Email Address** field.

24. Click the **Done** button.

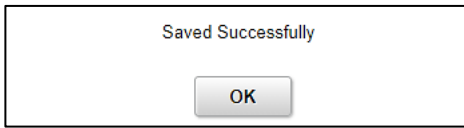
The **Individual Dependent/Beneficiary Information** page returns.



25. Scroll up, as required, and click the **Save** button in the top right-hand corner.

**Note:** The record will save without a National ID entered, but Agency Benefit Administrators (BAs) are tasked with obtaining it.

The **Saved Successfully** page displays in a pop-up window.



26. Click the **OK** button.

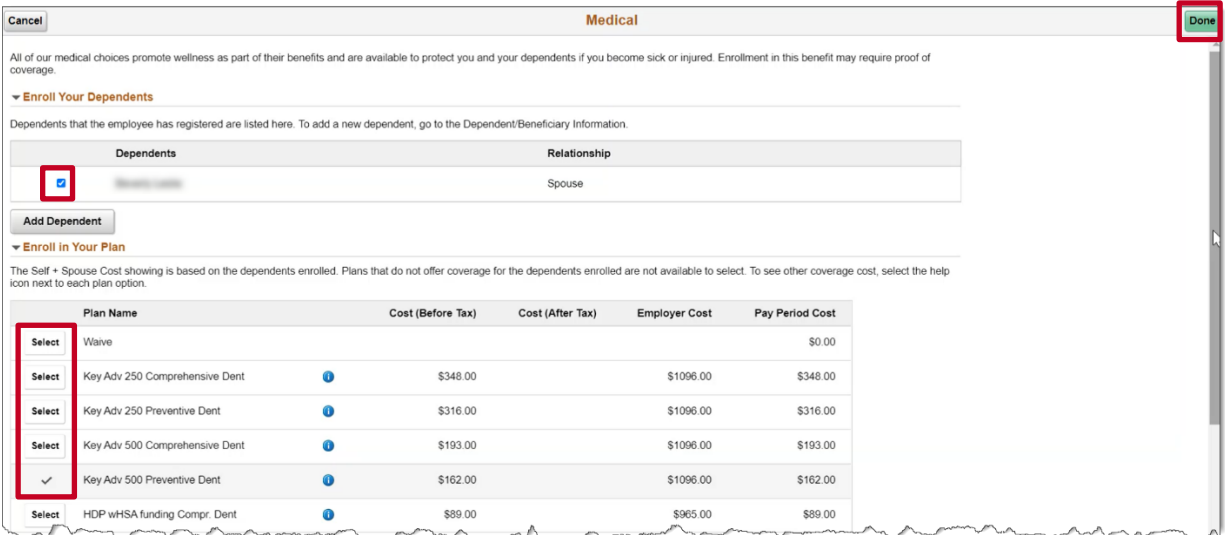
The **Individual Dependent/Beneficiary Information** page returns.

Dependent and Beneficiary Information			
Name	Relationship	Beneficiary	Dependent
	Spouse	✓	✓

27. Repeat steps 6 – 29 as required until all dependents are added.

28. After all dependent(s) are added, click the **X (Close)** button in the upper right-hand corner.

The **Medical** page returns.



The screenshot shows the 'Medical' page with several key elements highlighted by red boxes:

- The **Done** button in the top right corner.
- The **Enroll** checkbox in the 'Dependents' table.
- The **Select** buttons in the 'Enroll in Your Plan' table.

Dependents		Relationship
<input checked="" type="checkbox"/>	[Redacted Name]	Spouse

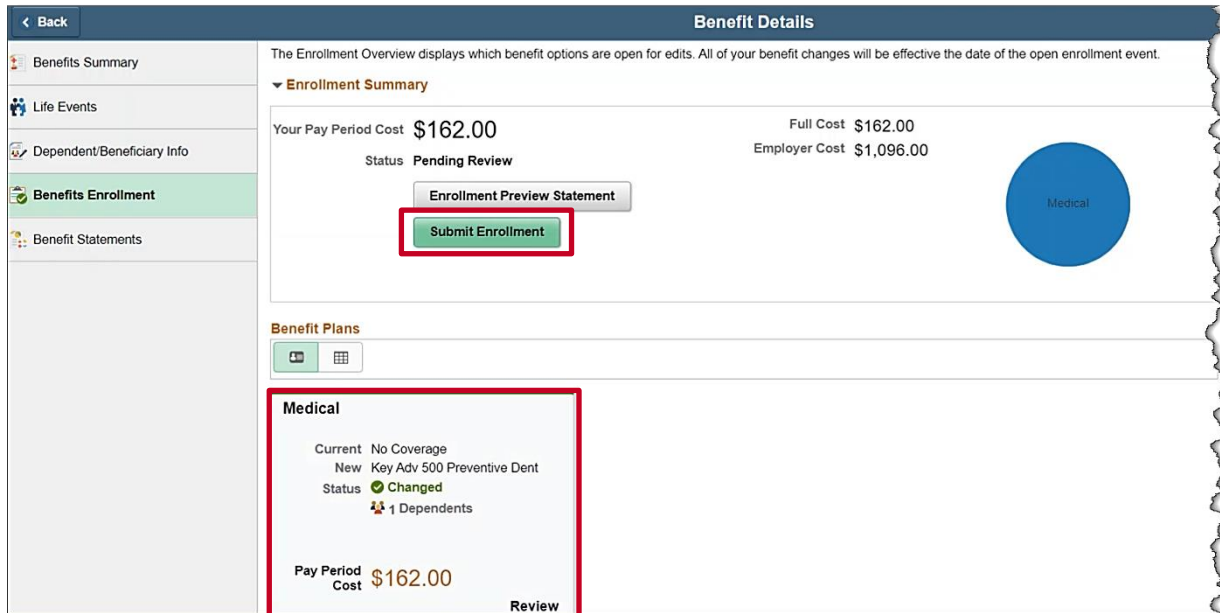
Plan Name	Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
<b>Select</b> Waive				\$0.00
<b>Select</b> Key Adv 250 Comprehensive Dent	\$348.00		\$1096.00	\$348.00
<b>Select</b> Key Adv 250 Preventive Dent	\$316.00		\$1096.00	\$316.00
<b>Select</b> Key Adv 500 Comprehensive Dent	\$193.00		\$1096.00	\$193.00
<input checked="" type="checkbox"/> Key Adv 500 Preventive Dent	\$162.00		\$1096.00	\$162.00
<b>Select</b> HDP w/HSA funding Compr. Dent	\$89.00		\$965.00	\$89.00

29. Within the **Enroll Your Dependents** section, select the **Enroll** checkbox option for the dependent(s) being added.

30. Within the **Enroll in Your Plan** section, click the **Select** button to select the applicable Benefits Plan.

31. Click the **Done** button in the upper right-hand corner.

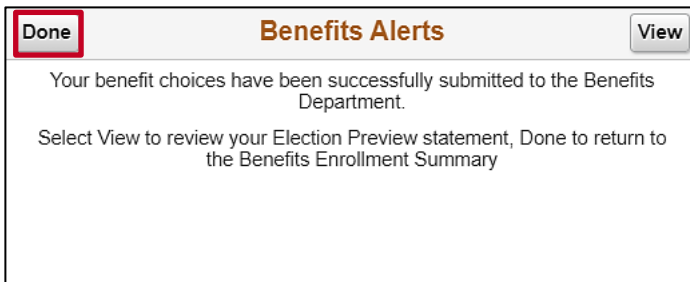
The **Benefit Details** page returns.



**Note:** The **Medical** tile now displays the coverage selected and the number of dependents enrolled along with the Pay Period Cost. The colored bar across the top of each tile changes color after that tile is reviewed. In the above screenshot, the **Medical** tile is green because it was already reviewed; the other tiles have not been reviewed and therefore have a blue bar.

32. Click the **Submit Enrollment** button.

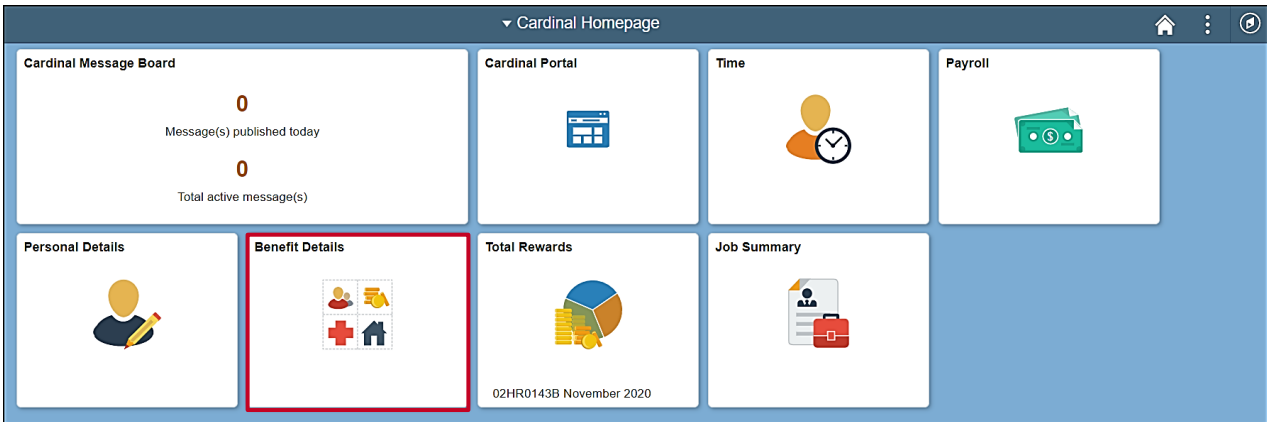
The **Benefits Alerts** page displays in a pop-up window.



33. Click the **Done** button.

**Note:** Alternatively, click the **View** button to return and review the Benefits Enrollment information.

The **Benefit Details** page returns, and enrollment is now complete.

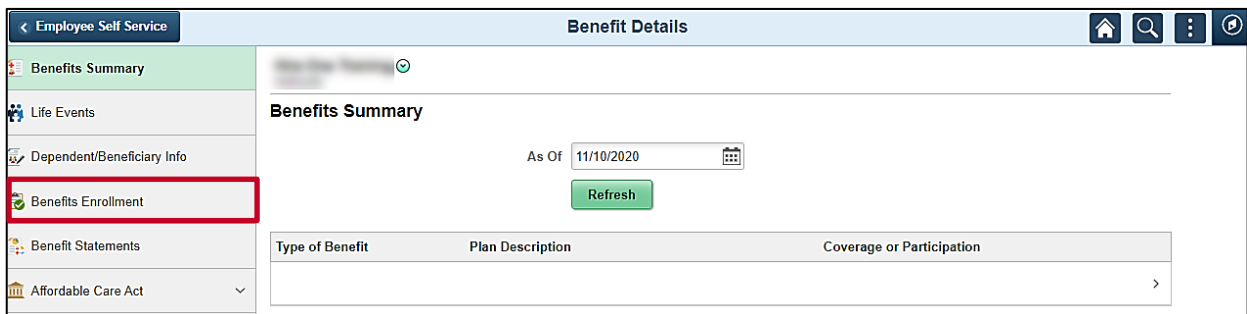
**Benefits Enrollment (Open Enrollment)**


1. Navigate to the **Benefit Details** page using the following path:

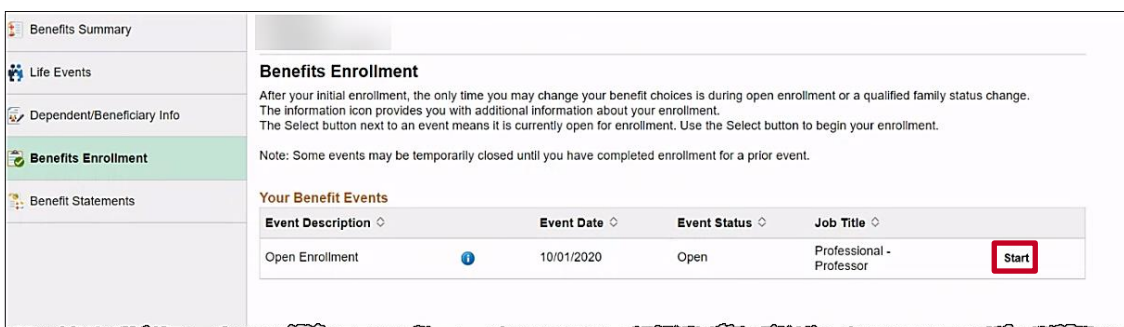
**Homepage > Benefit Details tile**

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

The **Benefits Summary** page displays.

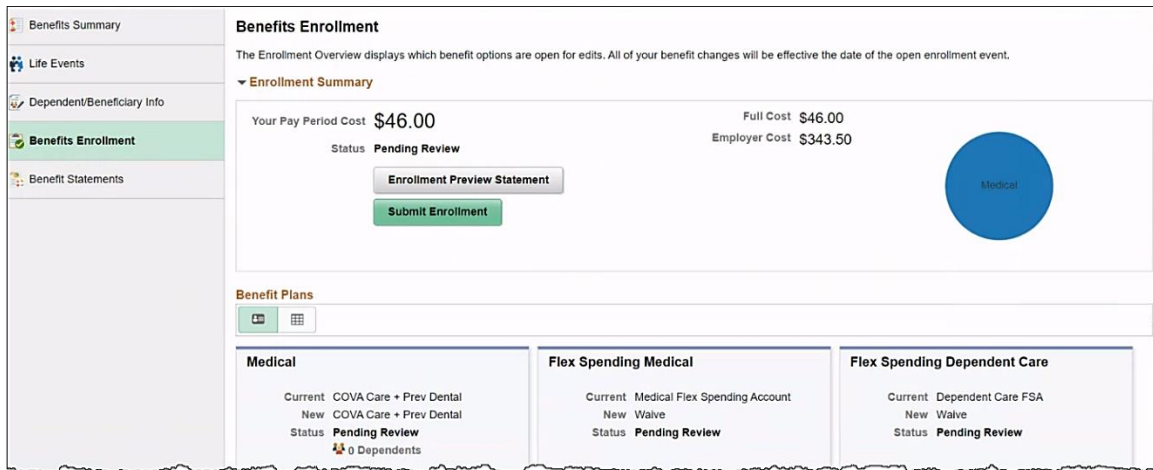


2. Click on **Benefits Enrollment** on the left-hand menu.



3. On the **Benefits Enrollment** page, click the **Start** button next to the Open Enrollment Benefit Event listed.

The **Benefits Enrollment** page displays.

**BN361 Enrollment Steps for an Employee**


**Benefits Enrollment**

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

▼ **Enrollment Summary**

Your Pay Period Cost **\$46.00**      Full Cost **\$46.00**  
 Status **Pending Review**      Employer Cost **\$343.50**

**Enrollment Preview Statement**  
**Submit Enrollment**

**Benefit Plans**

Medical	Flex Spending Medical	Flex Spending Dependent Care
Current COVA Care + Prev Dental	Current Medical Flex Spending Account	Current Dependent Care FSA
New COVA Care + Prev Dental	New Waive	New Waive
Status <b>Pending Review</b>	Status <b>Pending Review</b>	Status <b>Pending Review</b>
👤 0 Dependents		

- To complete the Benefit Enrollment process, follow Steps 4-32 from the **Benefit Enrollment New Hire** section above.