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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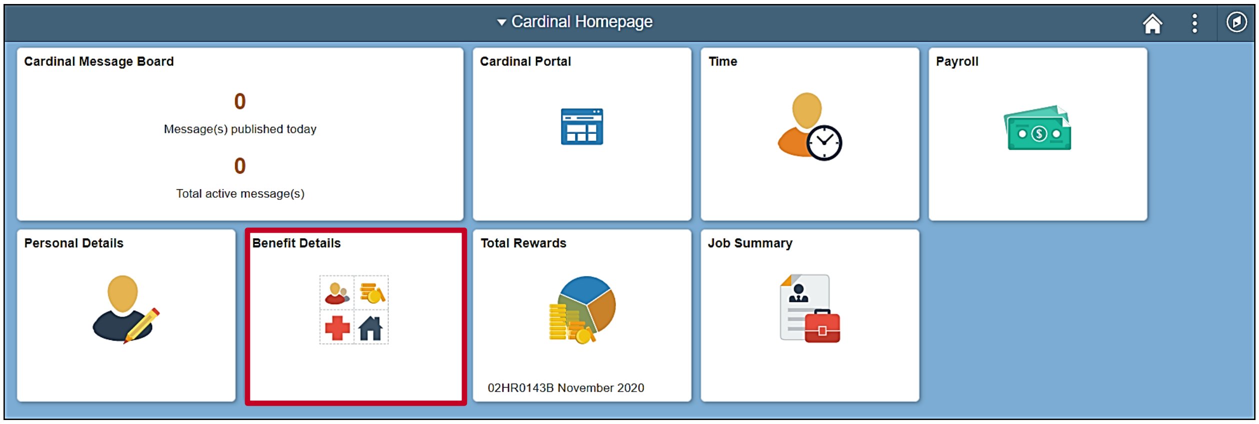
Benefit Enrollment (New Hire)

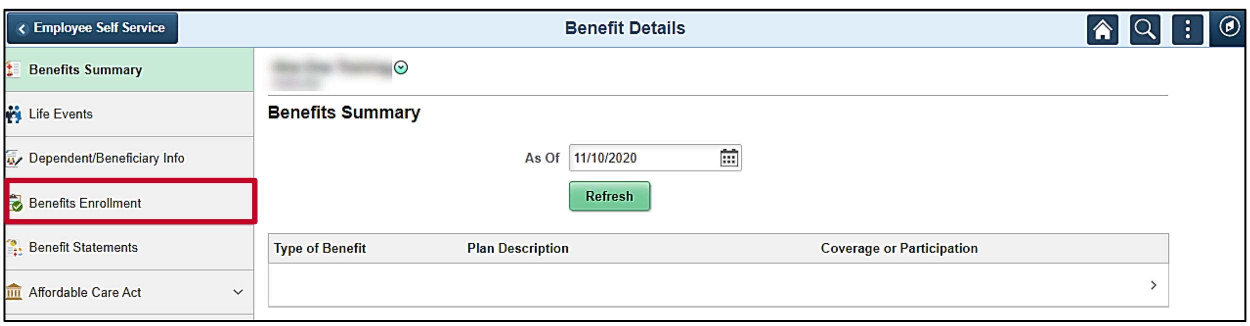
1. 

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

   Homepage > Benefit Details tile

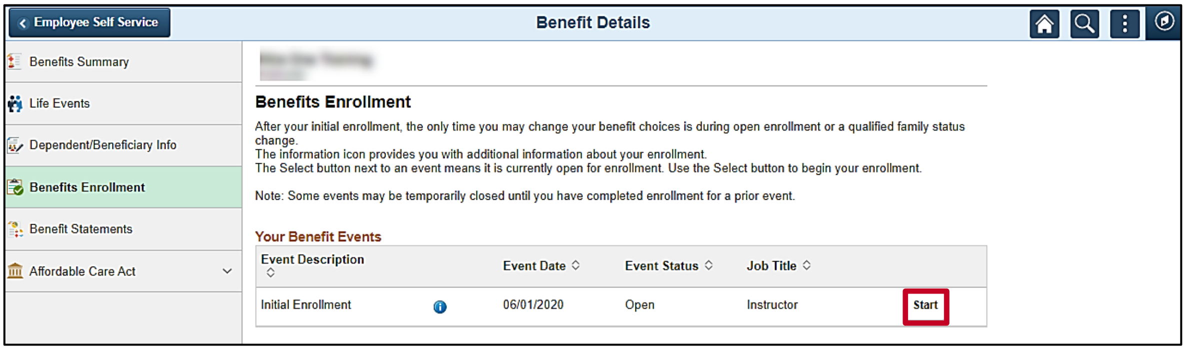
   Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

The **Benefit Details** page displays.



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

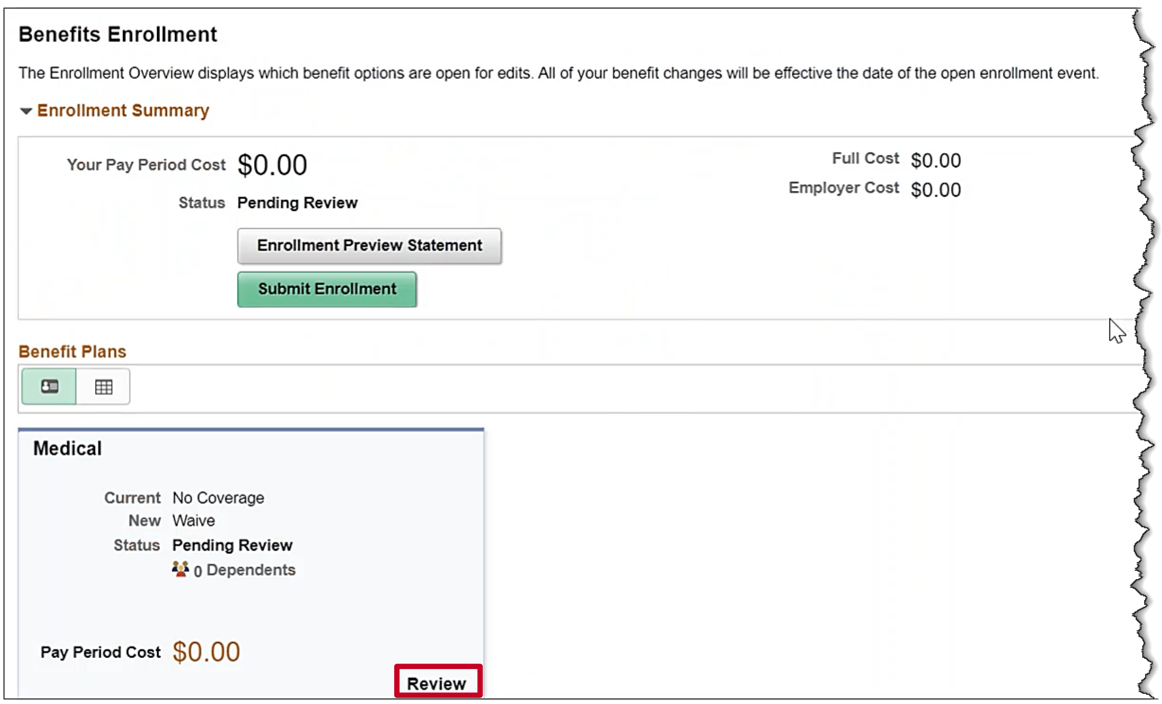
The **Benefit Details** page refreshes with the **Benefits Enrollment** information.



4. Click the **Start** button.

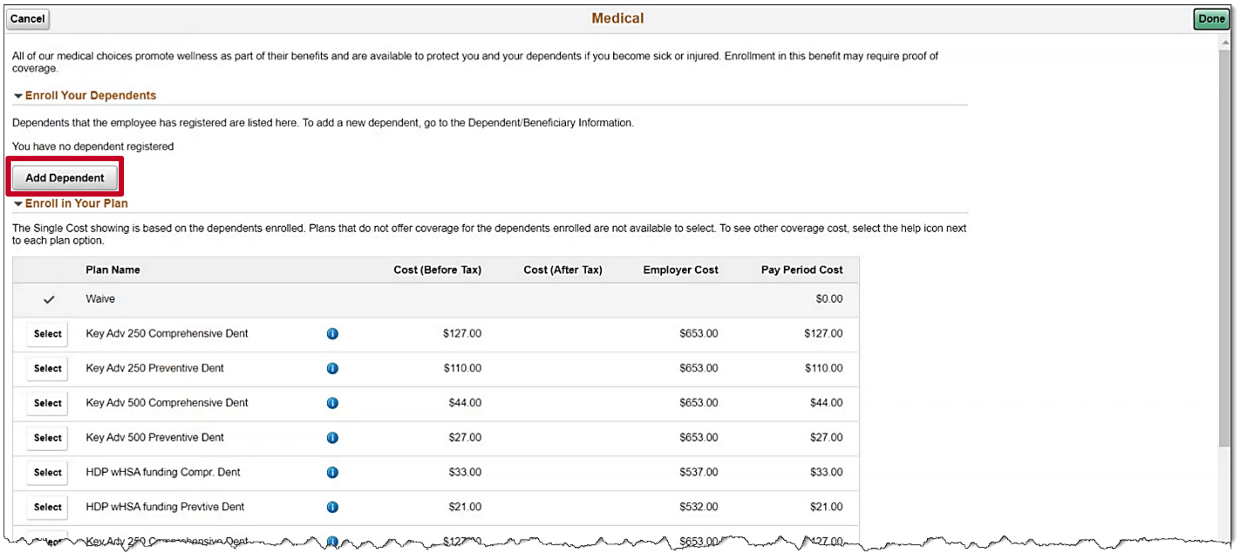
The **Benefits Enrollment** page displays.

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.

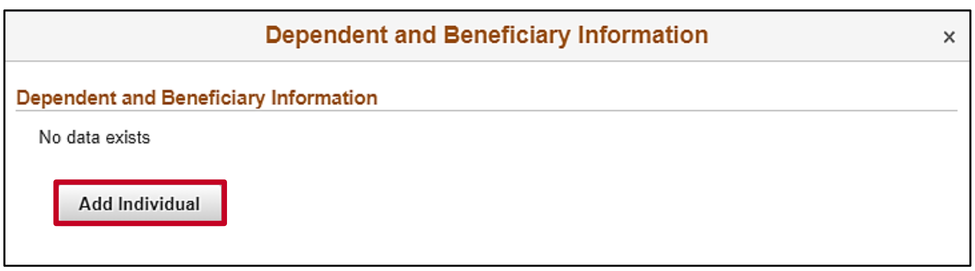
The **Medical** page displays.



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

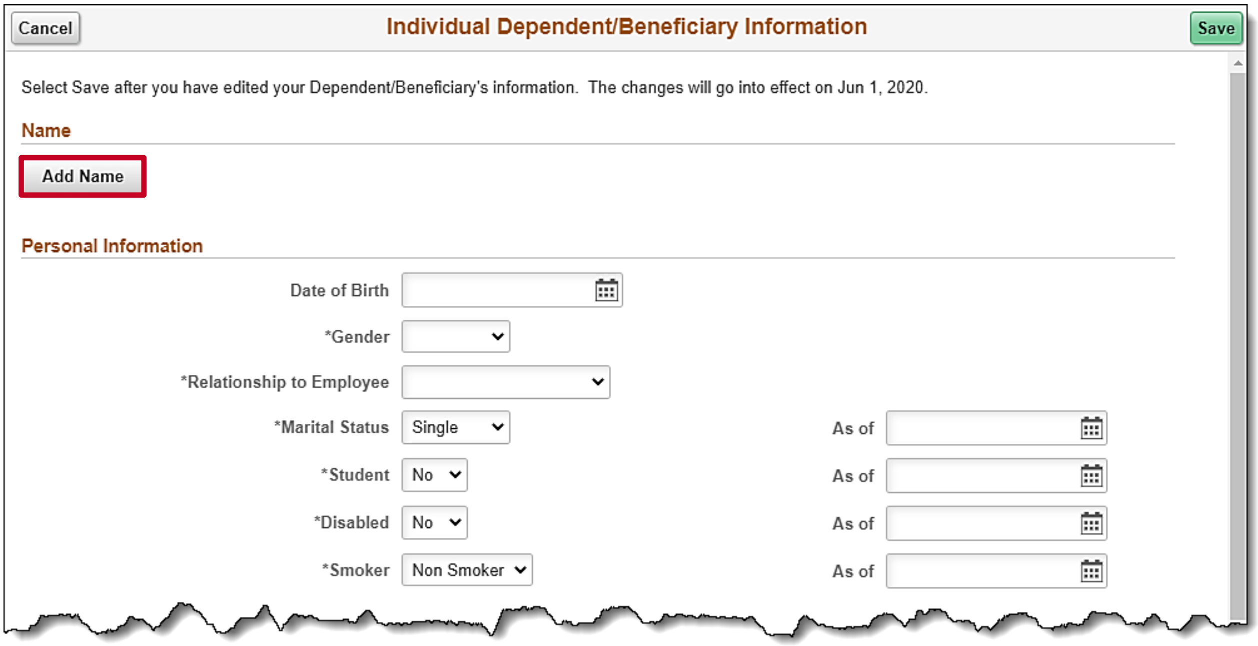
6. Click the **Add Dependent** button.

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



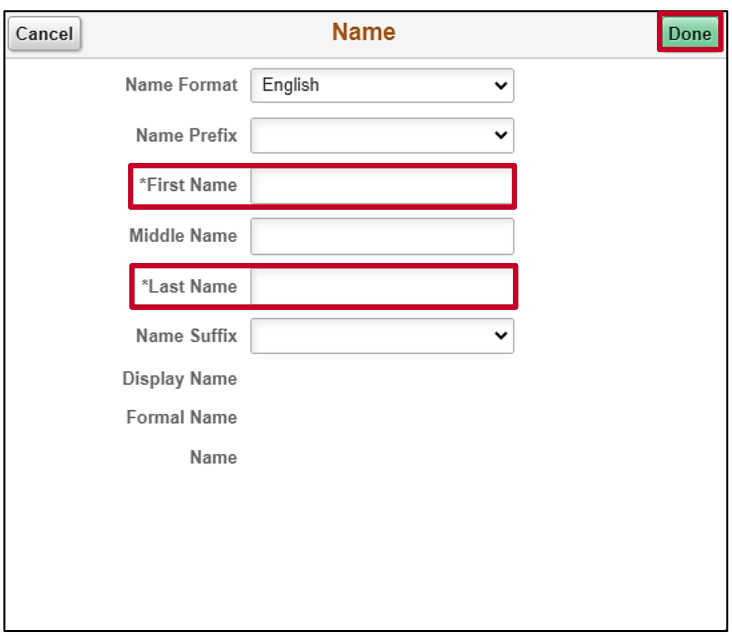
7. Click the **Add Individual** button to add a dependent to the Employee Record.

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



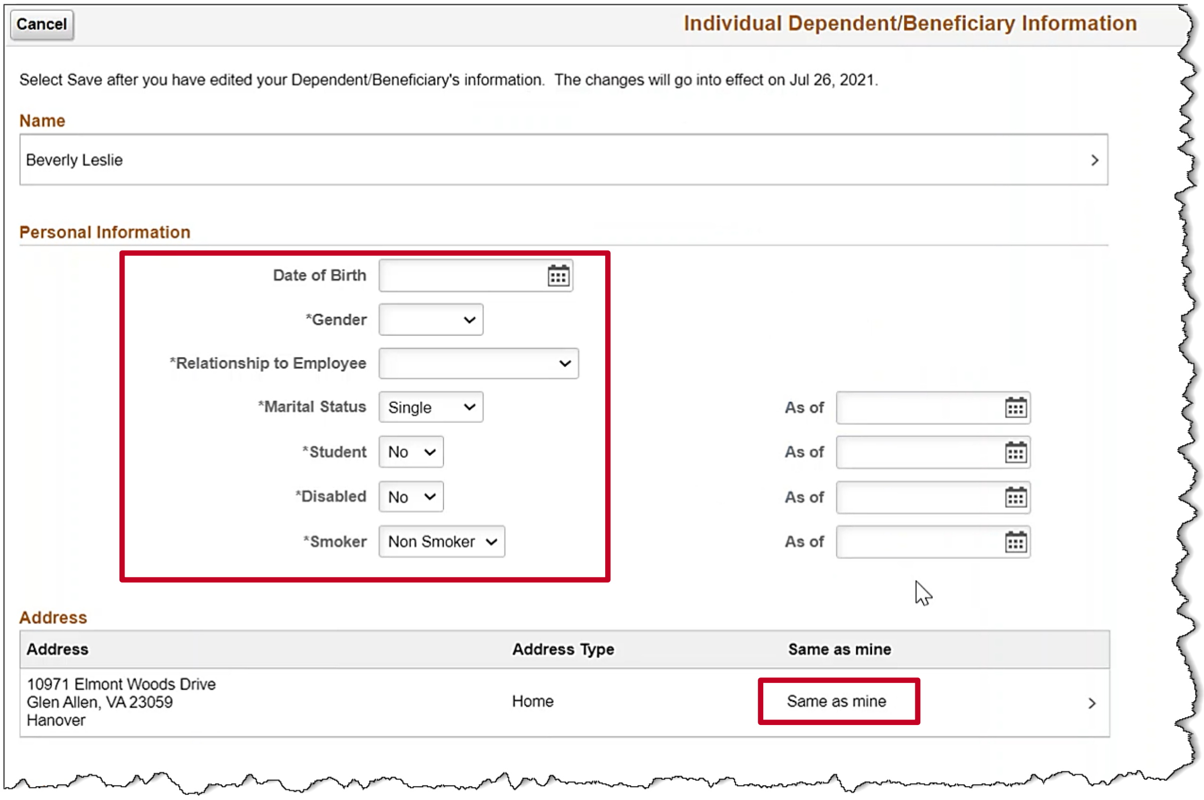
8. Click the **Add Name** button.

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



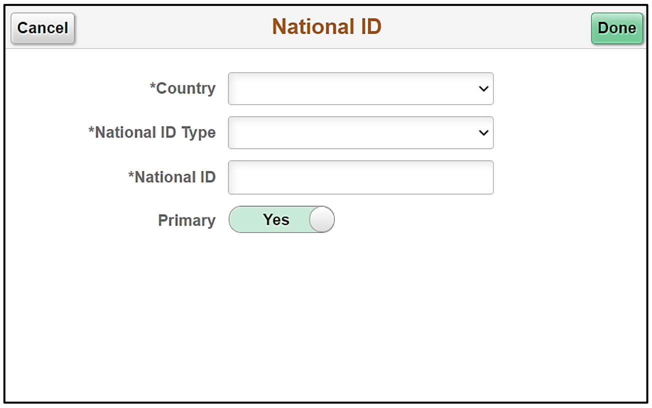
9. Enter the dependent’s name information. The **First Name** and **Last Name** fields are required.
10. Click the **Done** button.

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



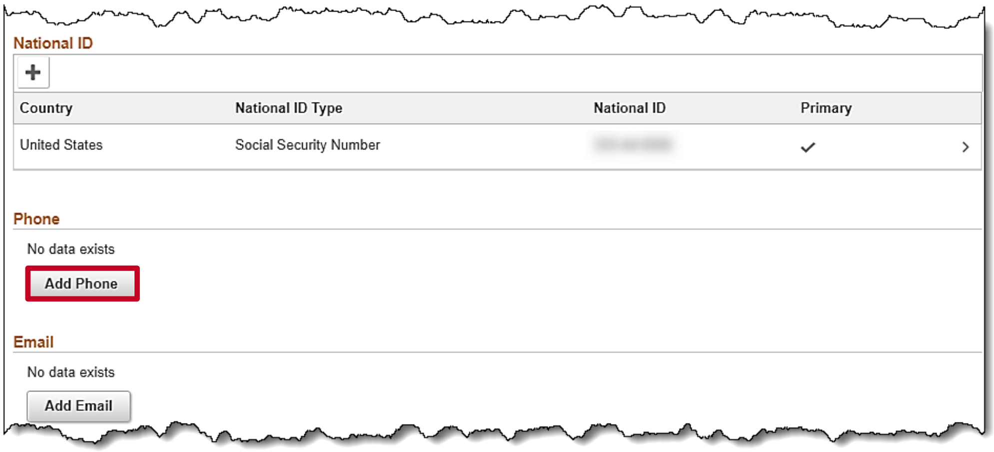
11. Input the dependent's date of birth in the **Date of Birth** field or select the appropriate Date of Birth using the **Date of Birth Calendar** icon.
12. Select the dependent's appropriate gender from the **Gender** drop-down list.
13. Select the dependent's appropriate relationship using the **Relationship 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.



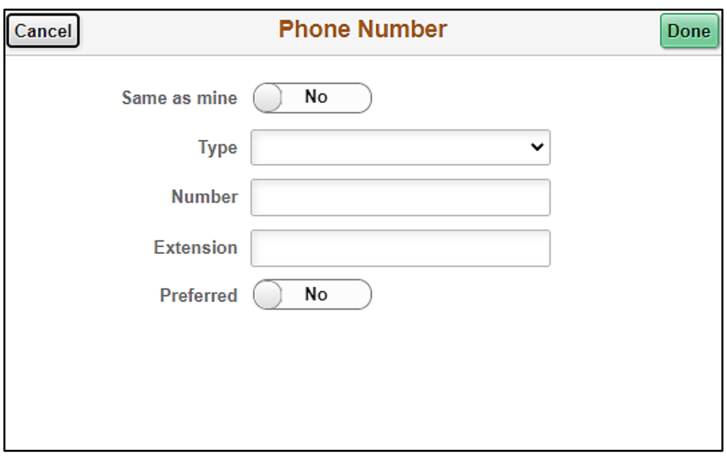
17. Complete the **Country**, **National ID Type**, and **National ID** fields for the dependent.
18. Click the **Done** button.

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



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

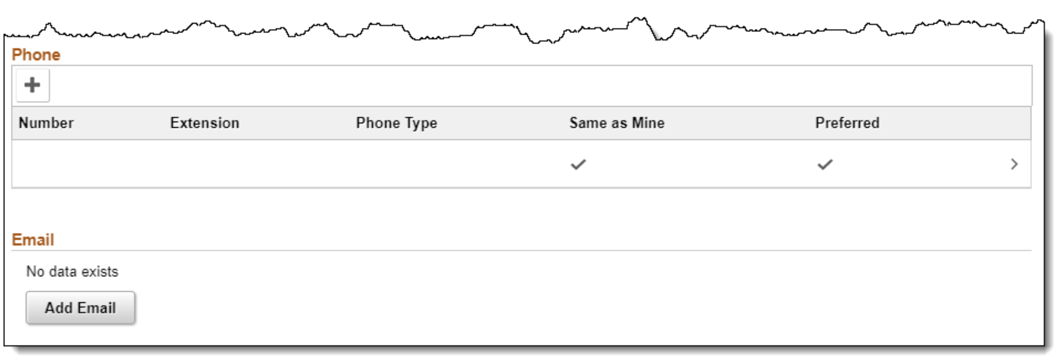
The **Phone Number** page displays in a pop-up window.



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

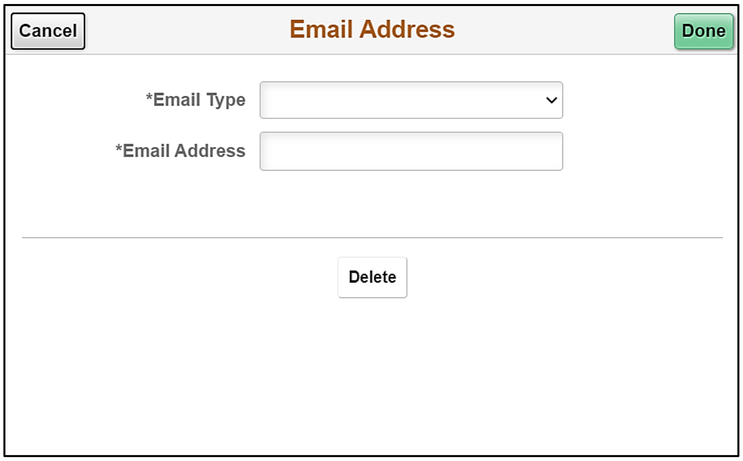
21. Click the **Done** button.

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



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

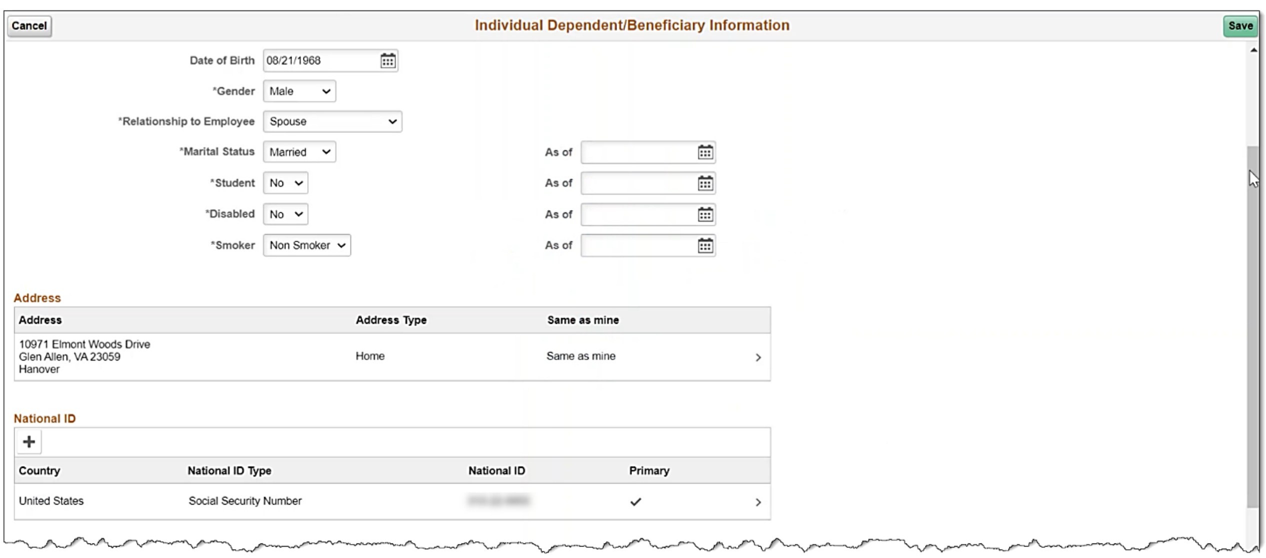
The **Email Address** page displays in a pop-up window.



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.



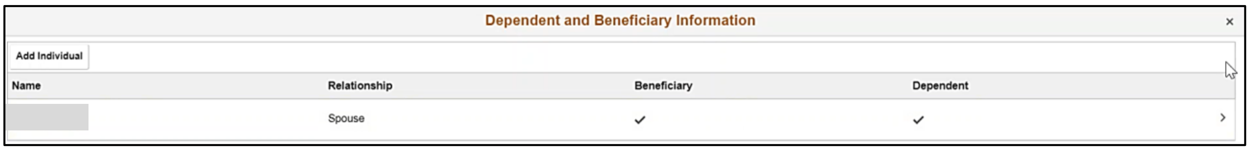
25. Scroll up, as required, and click the **Save** button in the top right-hand corner.

    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.

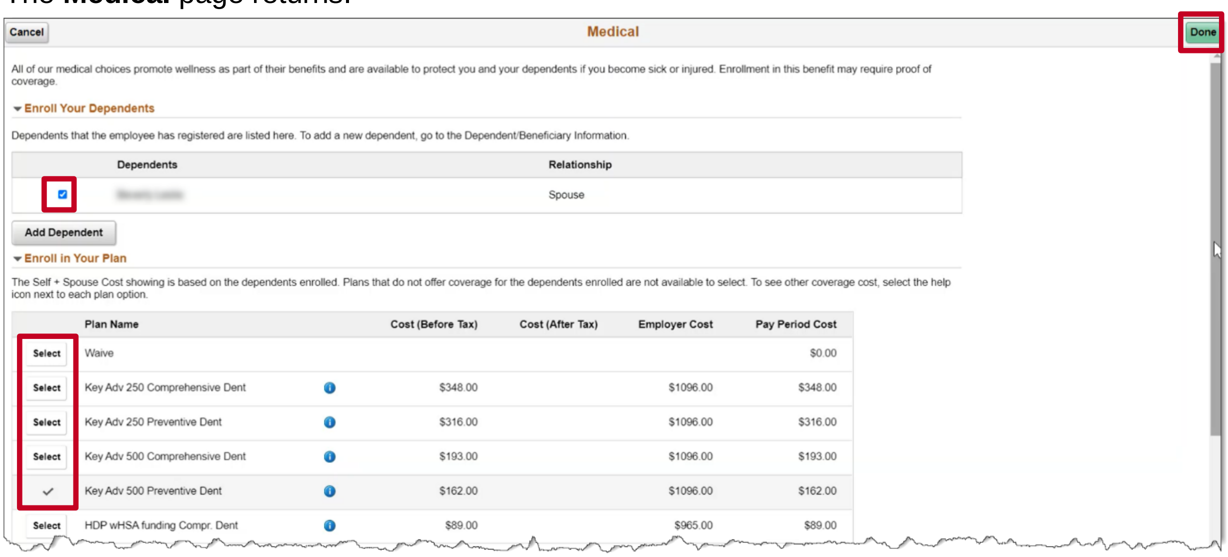
26. Click the **OK** button.

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



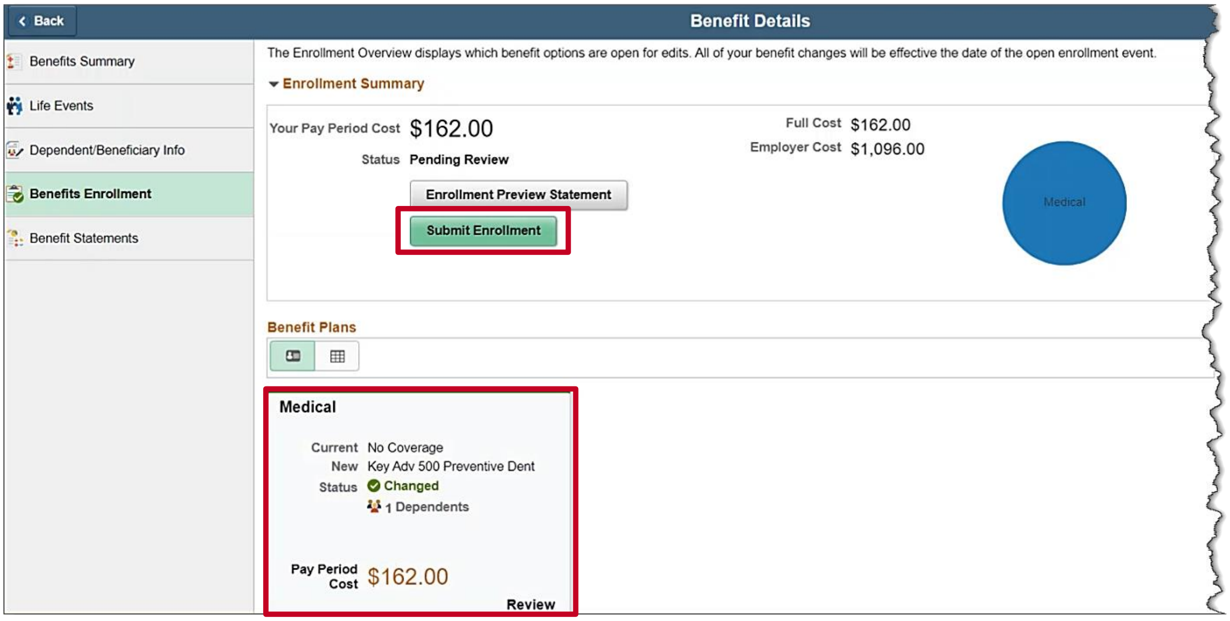
27. Repeat steps 6 – 29 as required until all dependents are added.
28. After all dependent(s) are added, click the **X (Close)** button in the upper right-hand corner.

   The **Medical** page returns.



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.

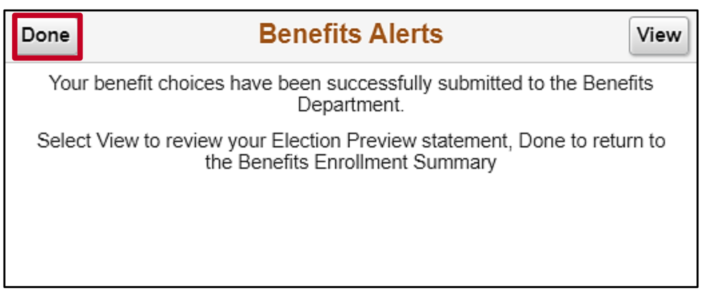
The **Benefit Details** page returns.



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.

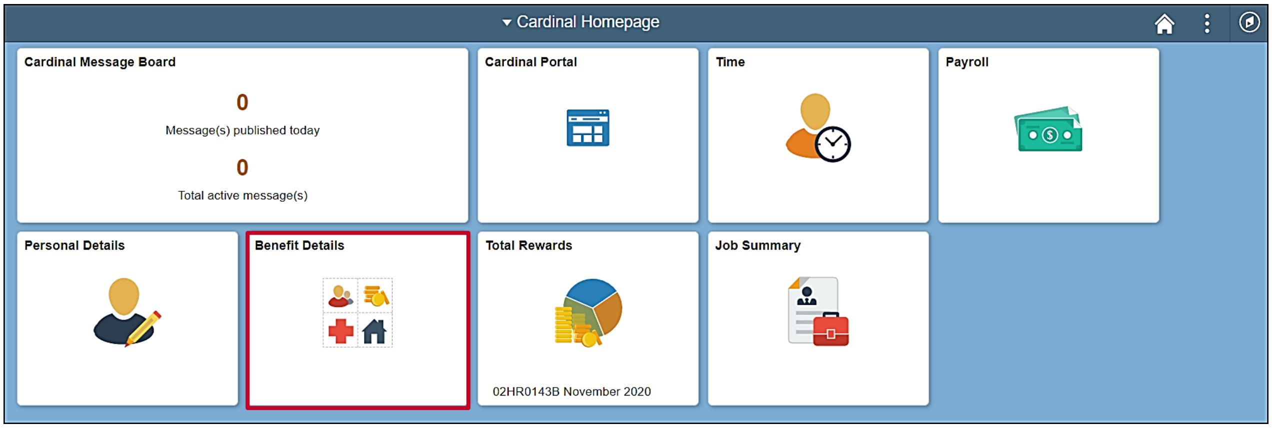


33. Click the **Done** button.

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)

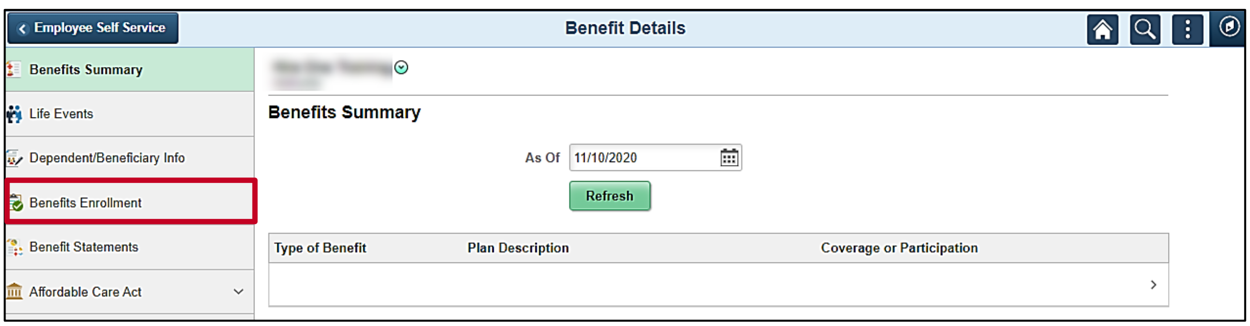


1. Navigate to the **Benefit Details** page using the following path:

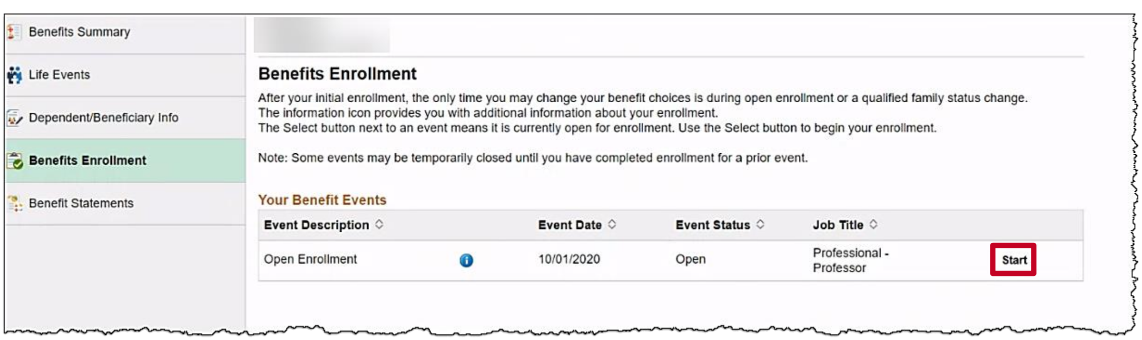
   Homepage > Benefit Details tile

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

The **Benefits Summary** page displays.

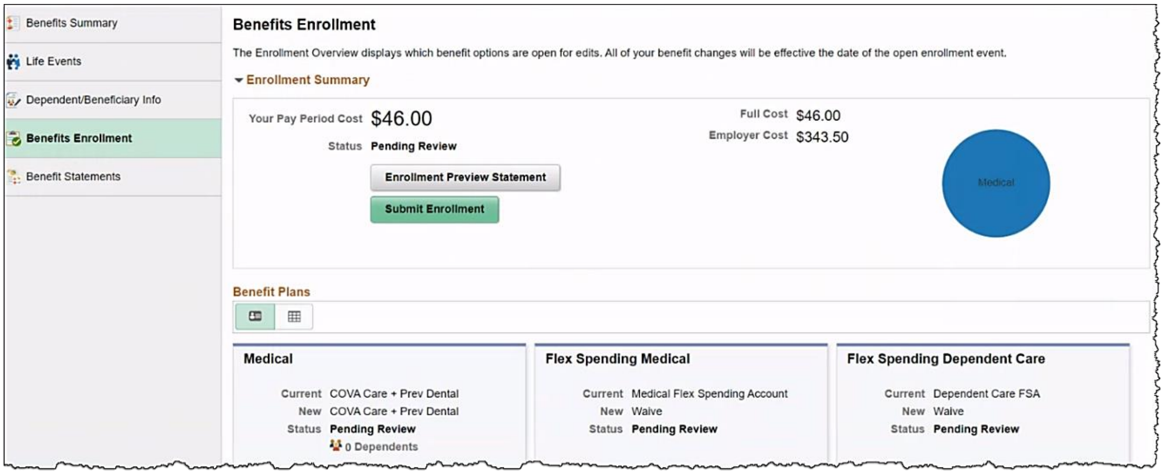


2. Click on **Benefits Enrollment** on the left-hand menu.



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

The **Benefits Enrollment** page displays.



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