

Creating and Completing a Life Event on behalf of an Employee Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to create and complete a manual Benefit Event (Life Event) on behalf of the employee.

This process is utilized when the employee does not initiate the qualifying Life Event through Employee Self-Service (ESS). For cases where the employee did initiate the qualifying Life Event, refer to the Job Aid titled **BN361_Completing an Employee Initiated Life Event**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

This Job Aid also contains sections that provide the step-by-step instructions utilized by an Agency BA to complete the following after the new hire Benefit Event is completed and finalized:

- Viewing the employee’s benefits information to validate accuracy
- Viewing/printing the Confirmation Statement for the employee

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.

Table of Contents

Creating and Processing a Life Event on behalf of an Employee (Adding Dependent(s)).....	2
Creating and Processing a Life Event on behalf of an Employee (Removing Dependent(s)).....	28
Viewing the Employee’s Benefits Information	41
Viewing/Printing a Confirmation Statement.....	43

Creating and Processing a Life Event on behalf of an Employee (Adding Dependent(s))

This section of the Job Aid should be referenced when you are creating and processing a Life Event on behalf of the employee wherein one or more dependents is being added to the employee's coverage (marriage, birth, adoption, etc.). The steps included in this section of the Job Aid are based on the following example scenario:

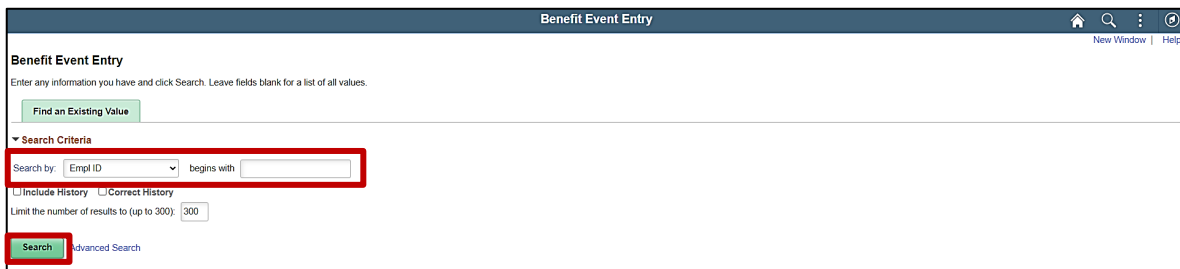
Scenario: An employee got married on 12/16/2022. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 12/19/2022 to add their spouse as a dependent and enroll them in their benefits. Additionally, a stepchild will be added and enrolled in the employee's benefits. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being added to the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

1. First, the Benefit Event must be created. Access the **Benefit Event** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Search** page displays.



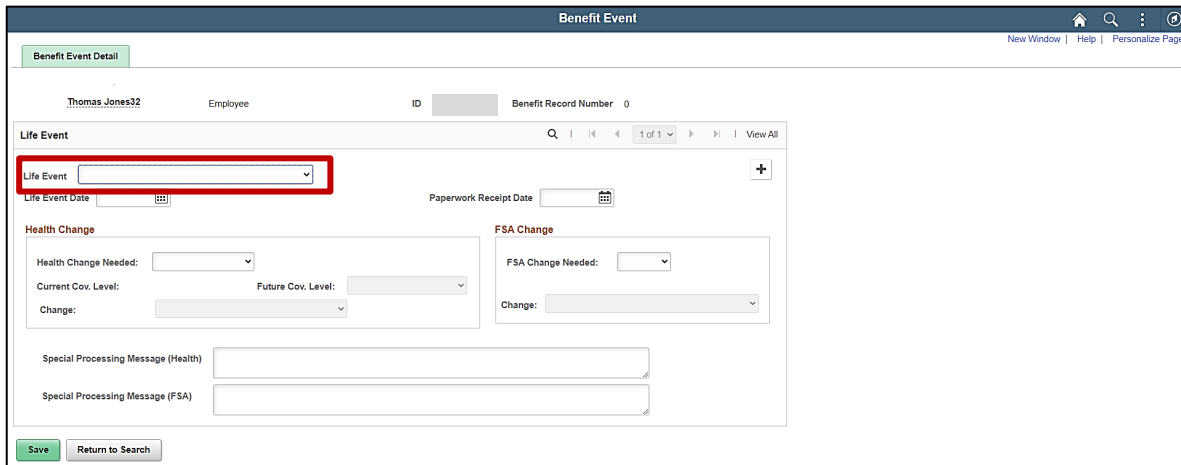
2. Enter the employee's Employee ID in the **Search by** field.

Note: The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.

3. Click the **Search** button.

BN361_Creating and Completing a Life Event on behalf of an Employee

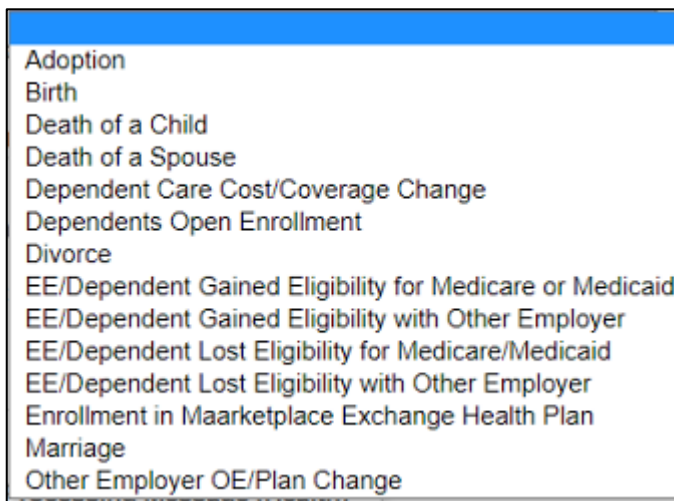
The **Benefit Event** page displays for the applicable employee.



The screenshot shows the 'Benefit Event' page for employee Thomas Jones32. The 'Life Event' dropdown menu is highlighted with a red box. Below it, there are fields for 'Life Event Date' and 'Paperwork Receipt Date'. There are also sections for 'Health Change' and 'FSA Change', each with 'Change Needed' and 'Change' dropdowns. At the bottom, there are 'Special Processing Message' fields for Health and FSA, and 'Save' and 'Return to Search' buttons.

4. Click the **Life Event** dropdown button.

The **Life Event** menu displays.

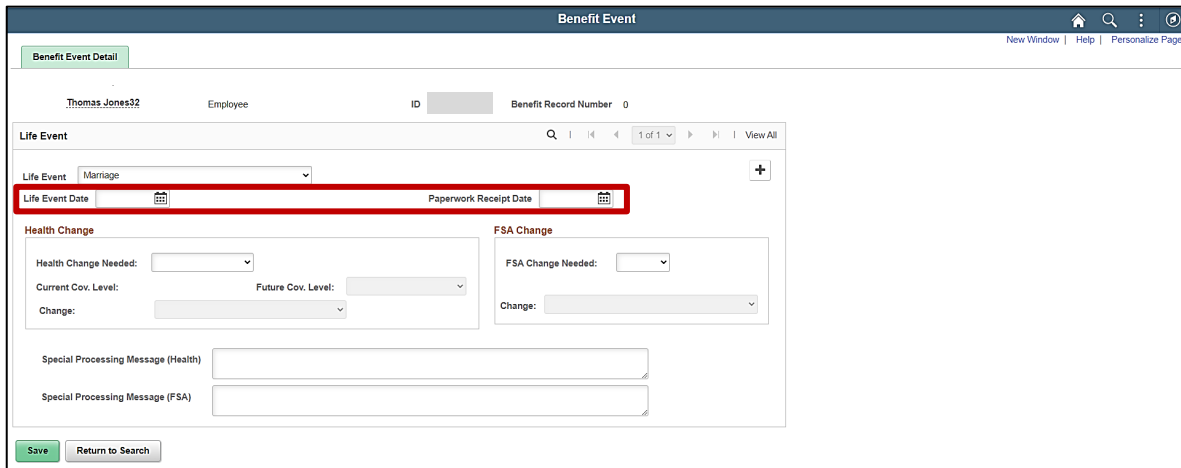


The screenshot shows the dropdown menu for 'Life Event'. The items listed are: Adoption, Birth, Death of a Child, Death of a Spouse, Dependent Care Cost/Coverage Change, Dependents Open Enrollment, Divorce, EE/Dependent Gained Eligibility for Medicare or Medicaid, EE/Dependent Gained Eligibility with Other Employer, EE/Dependent Lost Eligibility for Medicare/Medicaid, EE/Dependent Lost Eligibility with Other Employer, Enrollment in Marketplace Exchange Health Plan, Marriage, and Other Employer OE/Plan Change. The 'Adoption' item is highlighted with a blue background.

5. Select the applicable type of Life Event by clicking the corresponding list item ("Marriage" in this scenario).

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Benefit Event** page redisplay with the selected Life Event.



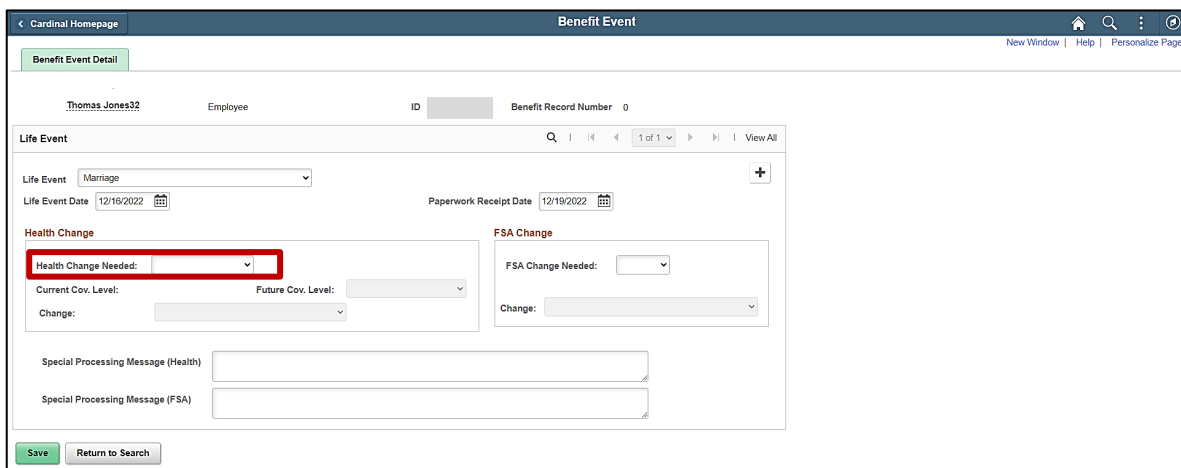
The screenshot shows the 'Benefit Event' form for employee Thomas Jones32. The 'Life Event' dropdown is set to 'Marriage'. Below it, the 'Life Event Date' and 'Paperwork Receipt Date' fields are highlighted with a red box. The 'Health Change' and 'FSA Change' sections are also visible, with various dropdown menus and text input fields.

6. Click the **Life Event Date Calendar** icon and select the applicable date (“12/16/2022” in this scenario).

Note: This is the date of the actual event (marriage, birth, divorce, etc.).

7. Click the **Paperwork Receipt Date Calendar** icon and select the applicable date (“12/19/2022” in this scenario).

Note: This is the date that the Benefits Enrollment form was received from the employee.



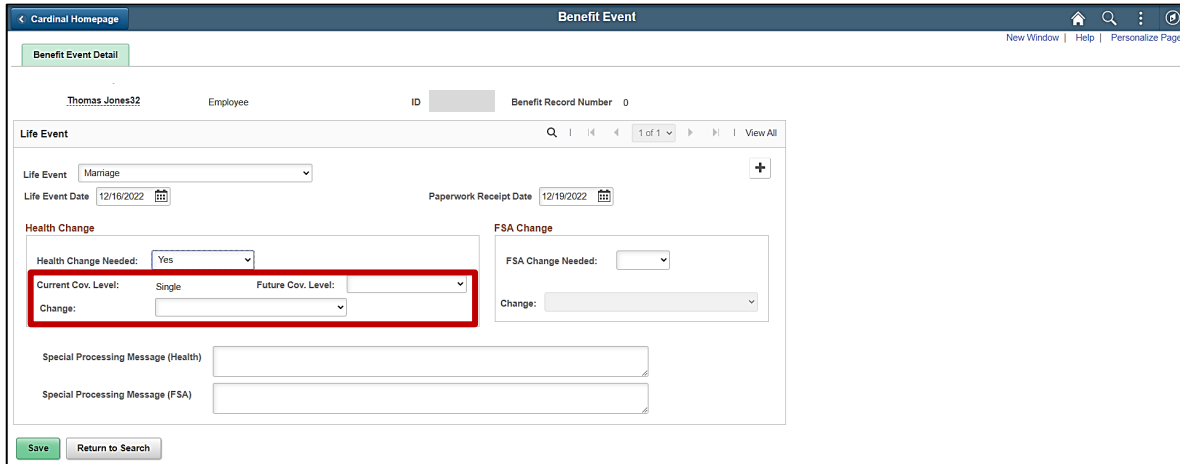
The screenshot shows the 'Benefit Event' form with the 'Life Event Date' set to 12/16/2022 and the 'Paperwork Receipt Date' set to 12/19/2022. The 'Health Change Needed' dropdown menu is highlighted with a red box.

8. Click the **Health Change Needed** dropdown button and select “Yes”.

Note: Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes” (i.e; this is a birth event and the employee is already enrolled in “Family” coverage. However, a new dependent is being added (newborn)). If “Yes” is not selected, a Benefit Event will not be created.

BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes.



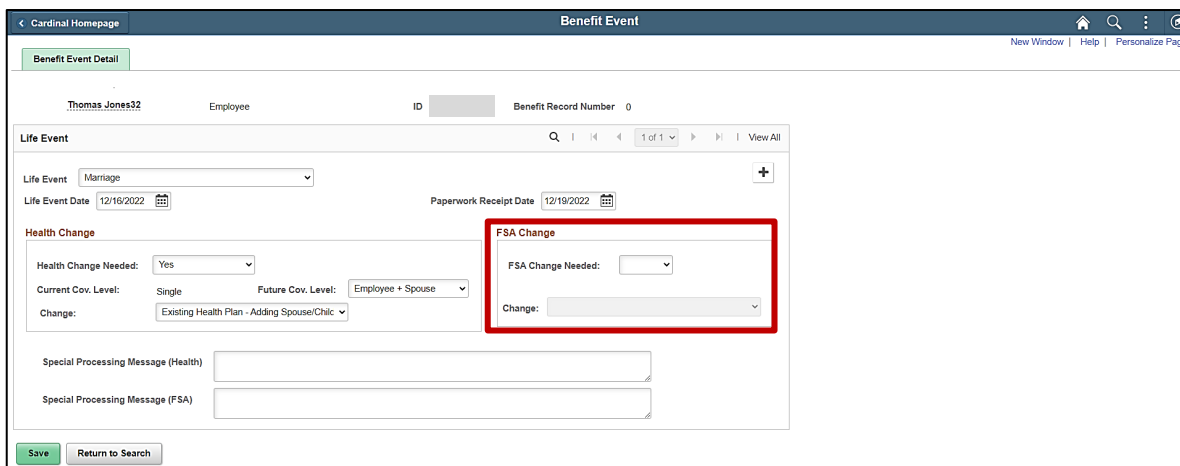
Note: The **Current Cov. Level** field auto-populates with the employee's current Health Plan enrollment coverage level.

9. Click the **Future Cov. Level** dropdown button and select the applicable coverage level.

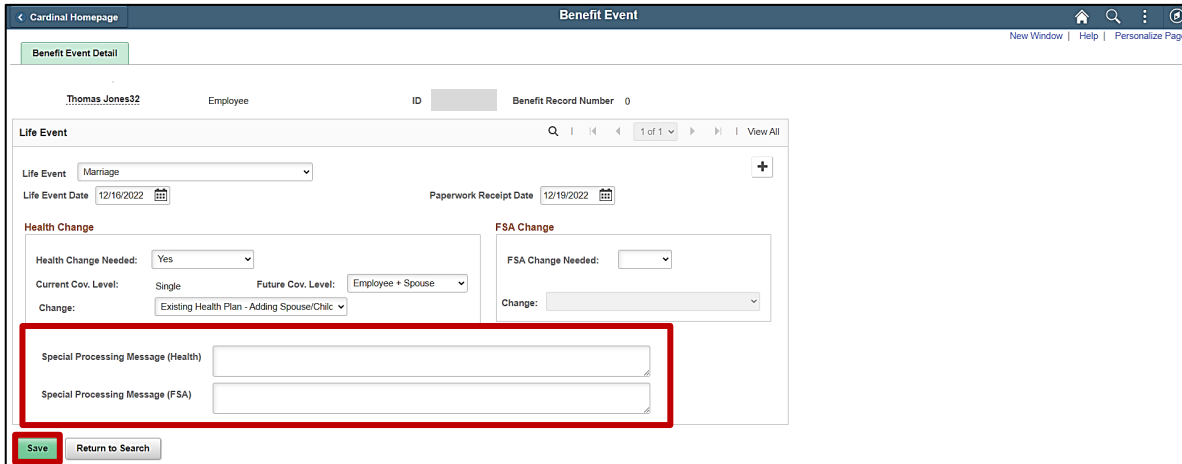
Note: The coverage levels available for selection are "Single, Employee", "Employee + Spouse", "Employee + CH (Child)", and "Family". Please note that this does not actually change the employee's enrollment. This will be done when the Life Event is processed.

10. Click the **Change** dropdown button and select "Existing Health Plan – Adding Spouse/Children".

Note: The selections available will vary based on the type of Life Event previously selected.



11. Complete the fields within the **FSA Change** section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee's FSA elections will be made for this scenario).

BN361_Creating and Completing a Life Event on behalf of an Employee


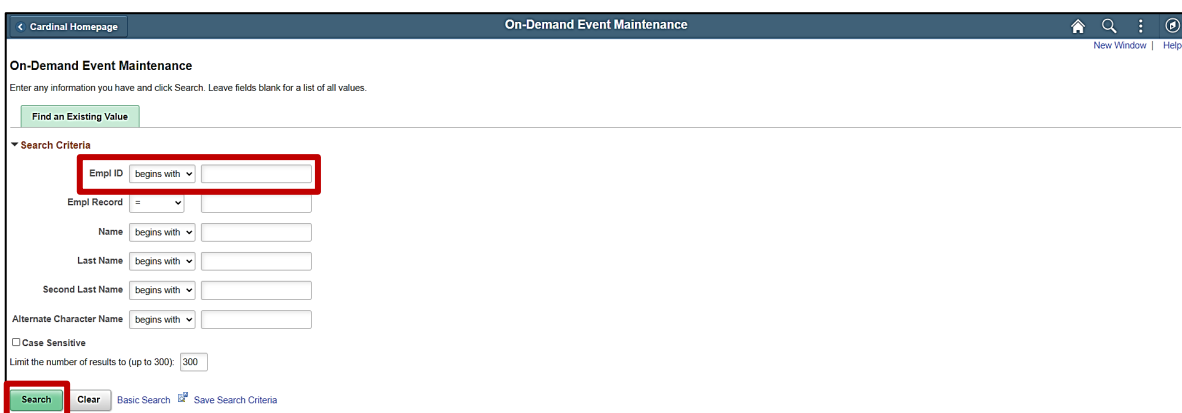
12. Click the **Save** button.
13. After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions.

Note: If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the **Special Processing Message (Health)** field and/or the **Special Processing Message (FSA)** field.

14. The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed. 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.



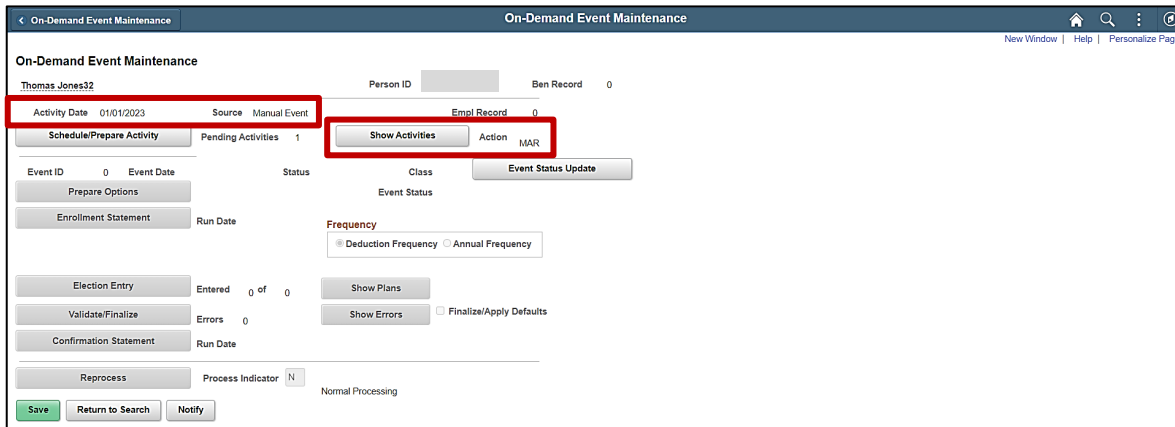
15. Enter the employee's Employee ID in the **Empl ID** field.

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.

BN361_Creating and Completing a Life Event on behalf of an Employee

16. Click the **Search** button.

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



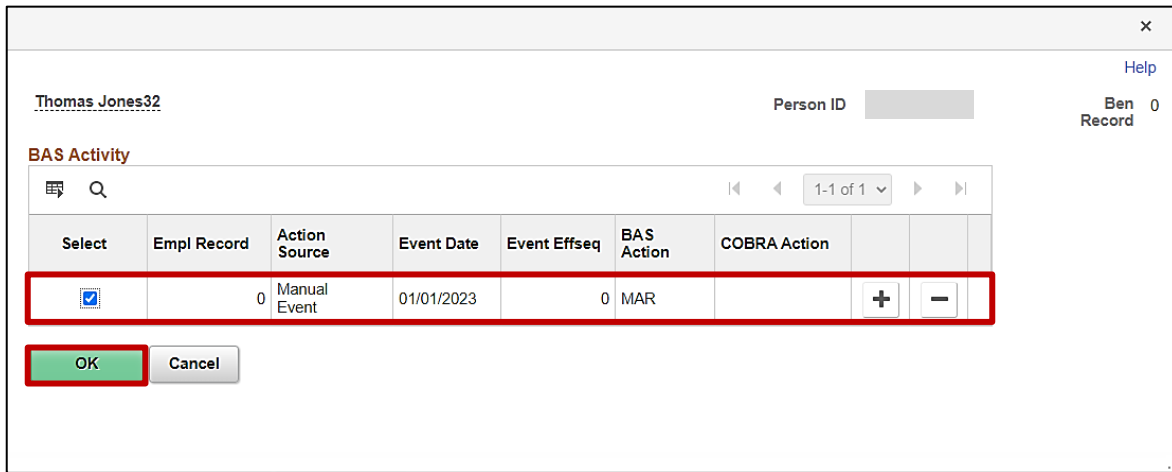
17. Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a marriage, so the **Activity Date** field defaults to the first day of the month following the date of marriage). Ensure that this date is accurate.

Note: The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“MAR” for Marriage in this scenario).

18. Click the **Show Activities** button.

BN361_Creating and Completing a Life Event on behalf of an Employee

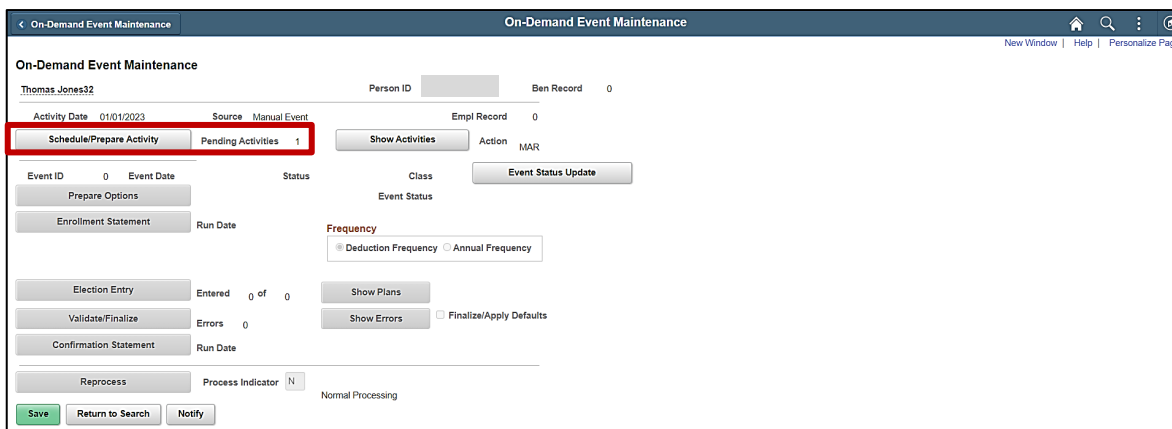
The **BAS Activity** page displays in a pop-up window.



Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	01/01/2023	0	MAR	

19. Ensure that the **Select** checkbox option for the Manual Event is selected and then click the **OK** button.

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

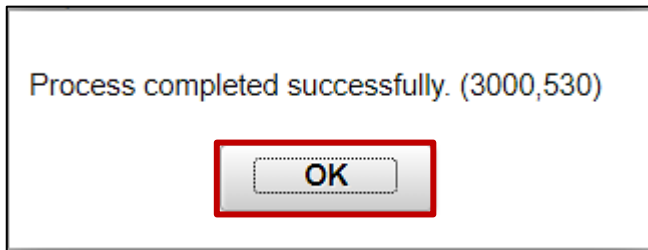


20. If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a "0". In this case, proceed to Step 21. If the **Pending Activities** field displays a "1", click the **Schedule/Prepare Activity** button.

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.

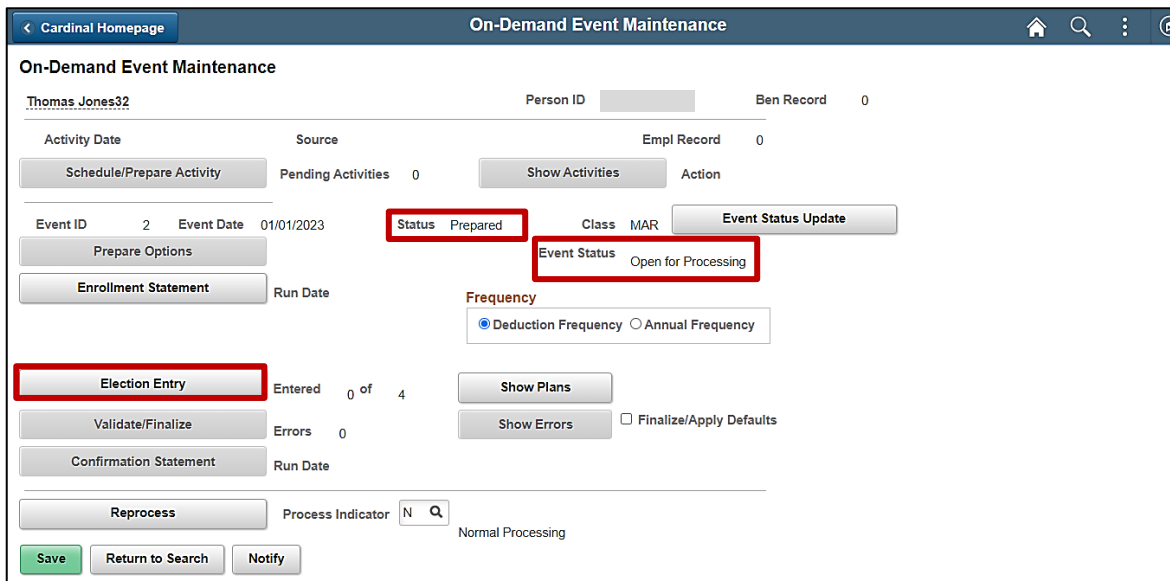
BN361_Creating and Completing a Life Event on behalf of an Employee

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



21. Click the **OK** button.

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

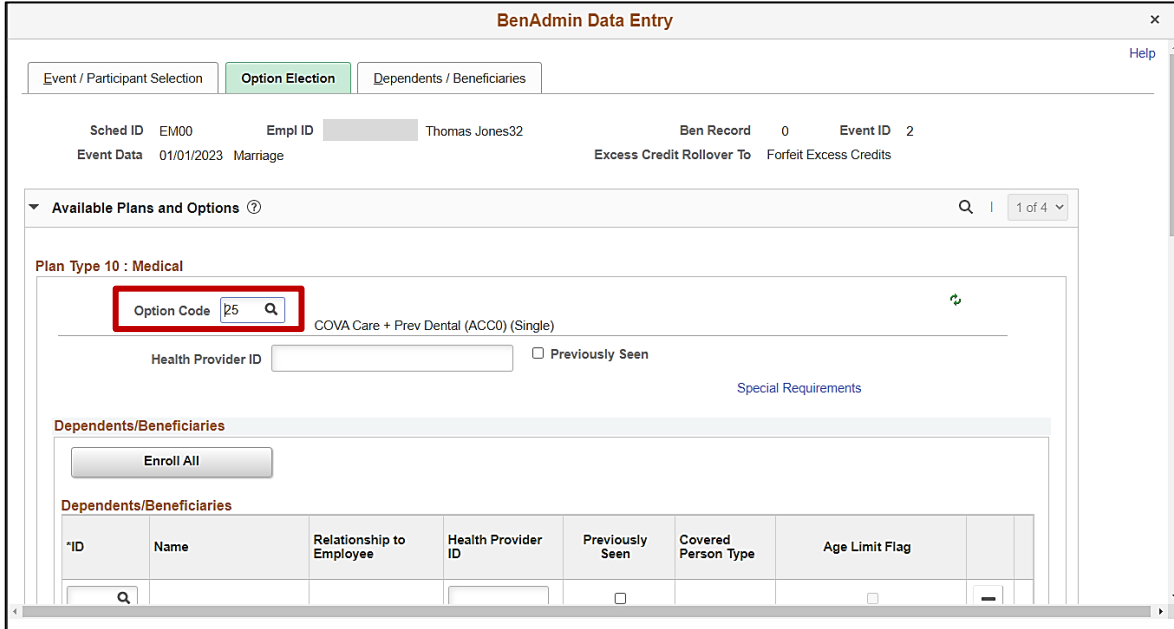


22. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

23. Click the **Election Entry** button.

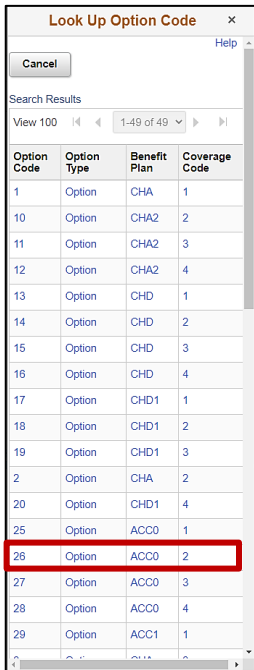
BN361_Creating and Completing a Life Event on behalf of an Employee

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



- 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.



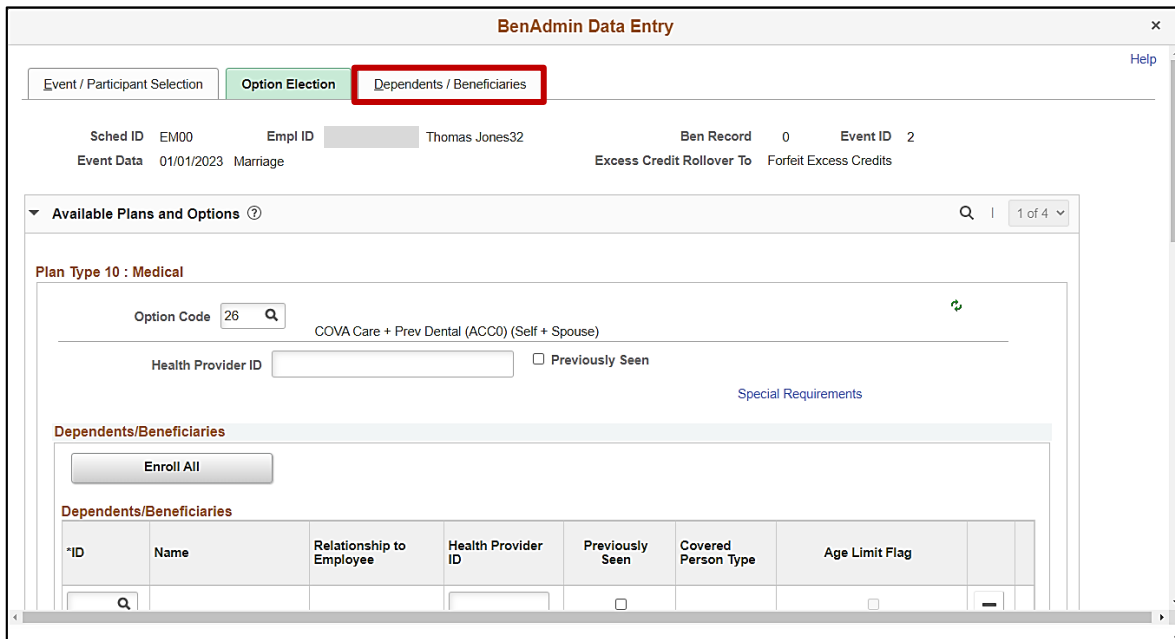
Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1
18	Option	CHD1	2
19	Option	CHD1	3
2	Option	CHA	2
20	Option	CHD1	4
25	Option	ACC0	1
26	Option	ACC0	2
27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

BN361_Creating and Completing a Life Event on behalf of an Employee

25. Select the same Benefit Plan that the employee is currently enrolled in but with the new 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 as this is a marriage and the employee is adding the spouse and a stepchild).

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] | Thomas Jones32 | Ben Record 0 | Event ID 2
 Event Data 01/01/2023 Marriage | Excess Credit Rollover To | Forfeit Excess Credits

Available Plans and Options 1 of 4

Plan Type 10 : Medical

Option Code 26 COVA Care + Prev Dental (ACC0) (Self + Spouse)

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

Dependents/Beneficiaries

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

26. Next, add the new dependent(s). Click the **Dependents / Beneficiaries** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Dependent / Beneficiaries** tab displays.

BenAdmin Data Entry [Close]

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

Schedule ID EM00 Employee ID [Redacted] Thomas Jones32
Event ID 2 Event Data 01/01/2023 Marriage
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

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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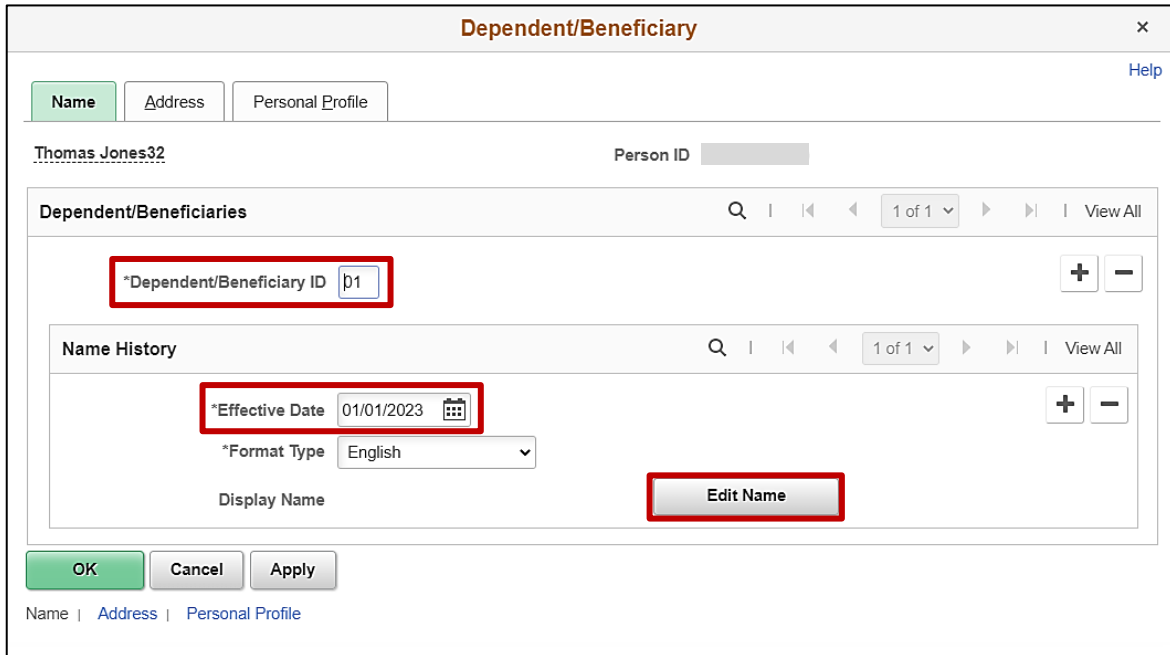
OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

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

BN361_Creating and Completing a Life Event on behalf of an Employee

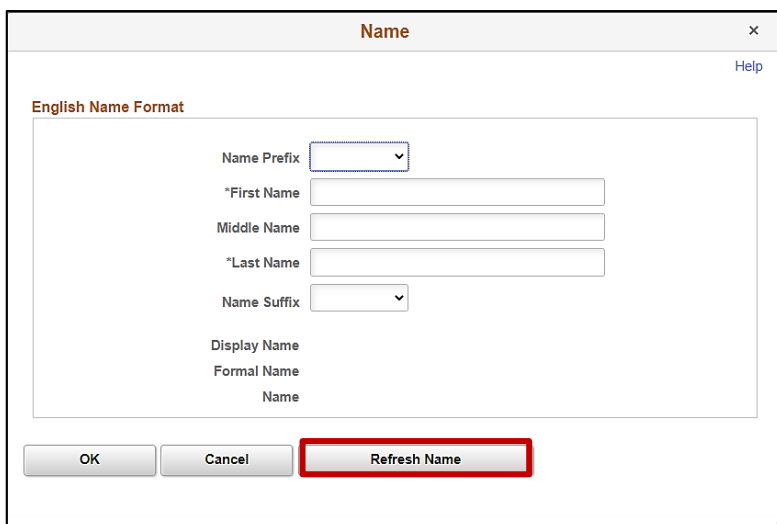
The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.



Note: For Life Events, the **Effective Date** field defaults to the date that the coverage will begin (in this scenario, the Life Event is a marriage, so the **Effective Date** field defaults to the first day of the month following the date of marriage). The **Dependent/Beneficiary ID** field will default to “01” for the first dependent and increment by 1 for each additional dependent subsequently added.

28. Click the **Edit Name** button.

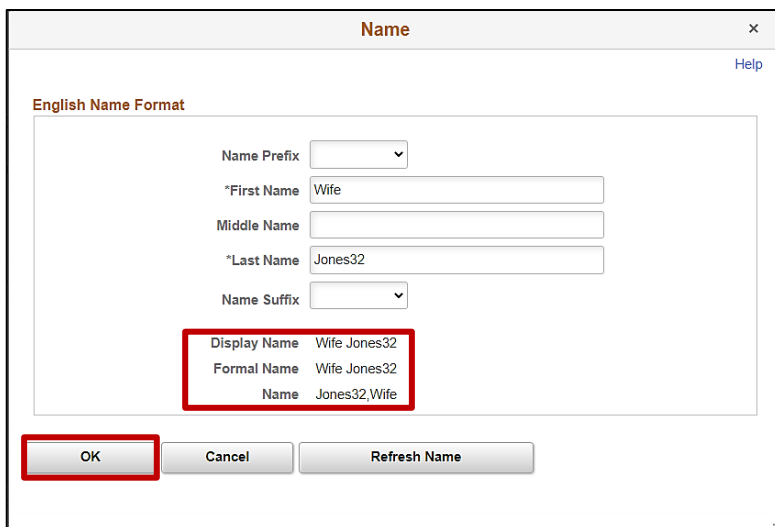
The **Name** page displays in a pop-up window.



BN361_Creating and Completing a Life Event on behalf of an Employee

- 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.
- Click the **Refresh Name** button.

The **Name** page refreshes.



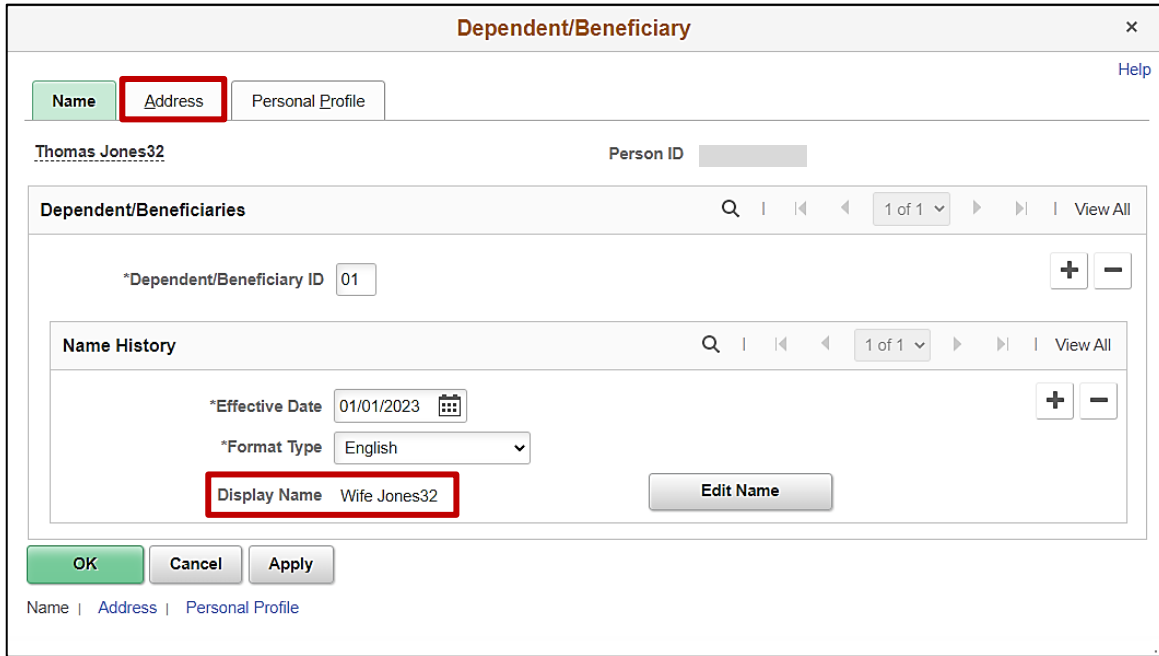
Name Prefix	
*First Name	Wife
Middle Name	
*Last Name	Jones32
Name Suffix	
Display Name	Wife Jones32
Formal Name	Wife Jones32
Name	Jones32,Wife

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

- Click the **OK** button.

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Name** tab redisplay.



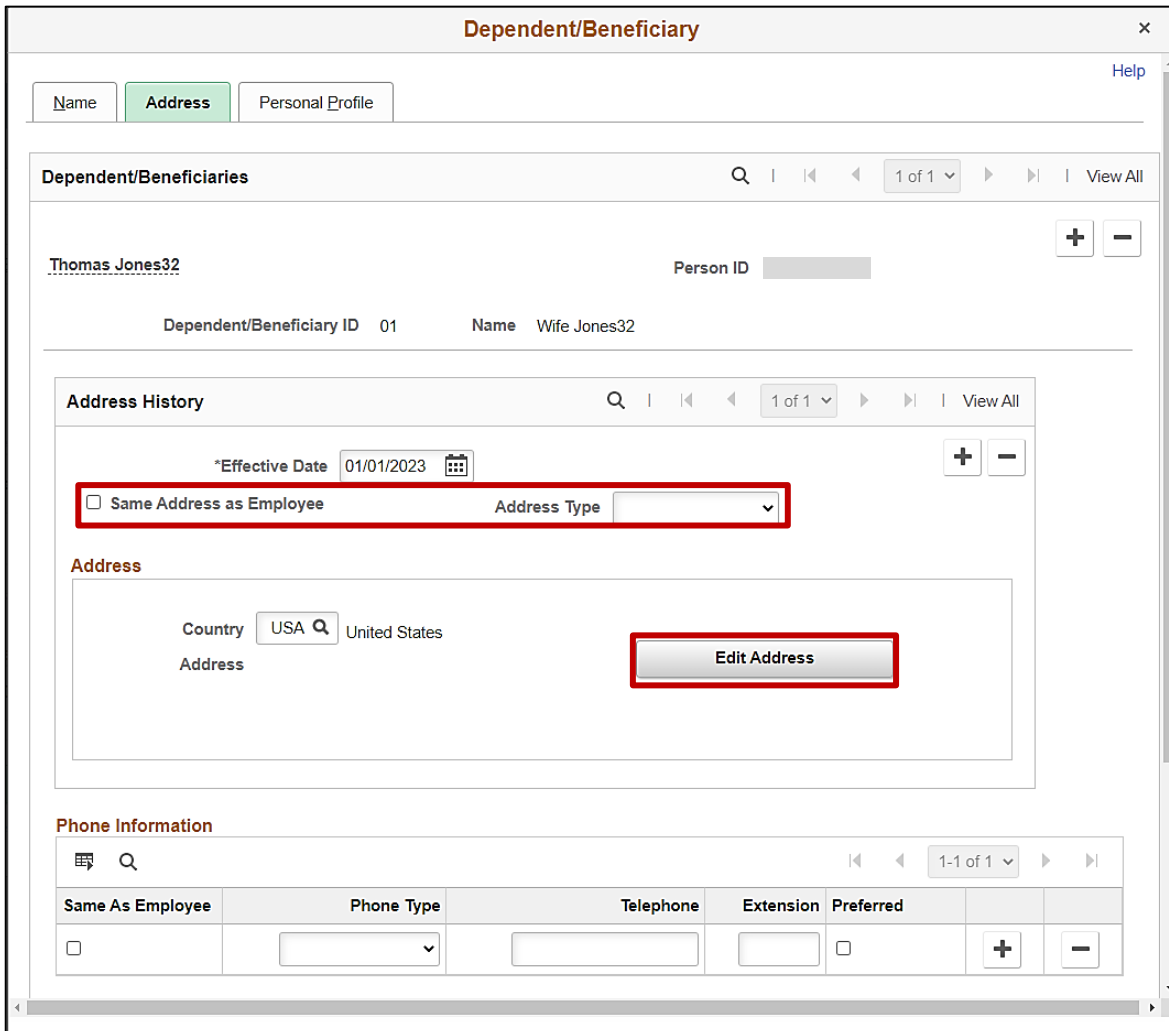
The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are three tabs: "Name" (selected), "Address", and "Personal Profile". Below the tabs, the name "Thomas Jones32" and "Person ID" are displayed. A "Dependent/Beneficiaries" section contains a table with one entry: "Dependent/Beneficiary ID" 01. Below this is a "Name History" section with a table containing one entry. The "Effective Date" is 01/01/2023 and the "Format Type" is English. The "Display Name" field is highlighted with a red box and contains the text "Wife Jones32". There is an "Edit Name" button next to it. At the bottom, there are "OK", "Cancel", and "Apply" buttons.

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

32. Click the **Address** tab.

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Address** tab displays.



Dependent/Beneficiary

Name **Address** Personal Profile Help

Dependent/Beneficiaries 1 of 1 View All

Thomas Jones32 Person ID [Redacted]

Dependent/Beneficiary ID 01 Name Wife Jones32

Address History 1 of 1 View All

*Effective Date 01/01/2023

Same Address as Employee Address Type [Dropdown]

Address

Country USA United States

Address [Redacted] **Edit Address**

Phone Information 1-1 of 1

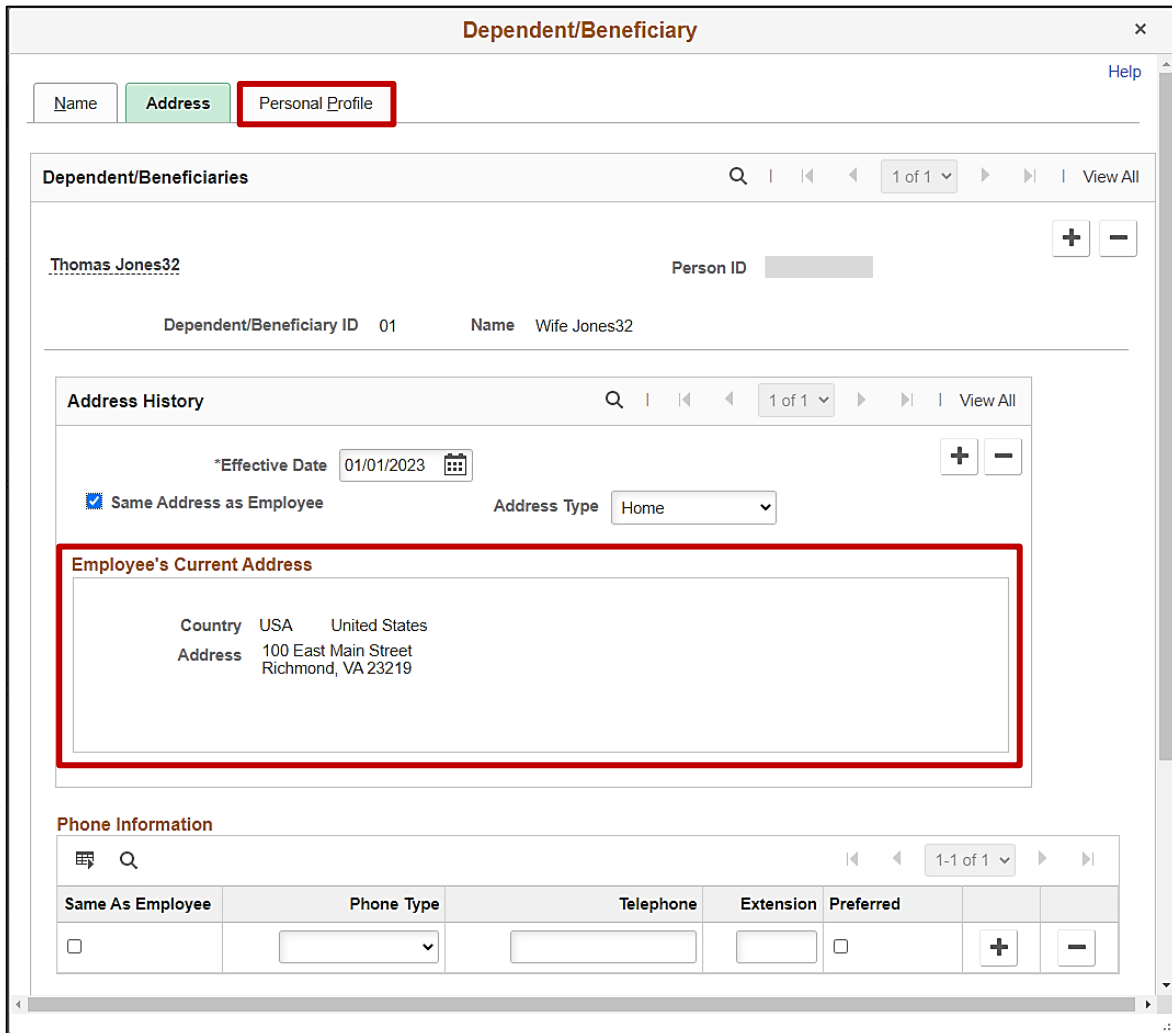
Same As Employee	Phone Type	Telephone	Extension	Preferred
<input type="checkbox"/>	[Dropdown]	[Text]	[Text]	<input type="checkbox"/>

33. 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)

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Address** tab refreshes.



Dependent/Beneficiary

Name Address **Personal Profile**

Dependent/Beneficiaries

Thomas Jones32 Person ID [Redacted]

Dependent/Beneficiary ID 01 Name Wife Jones32

Address History

*Effective Date 01/01/2023

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

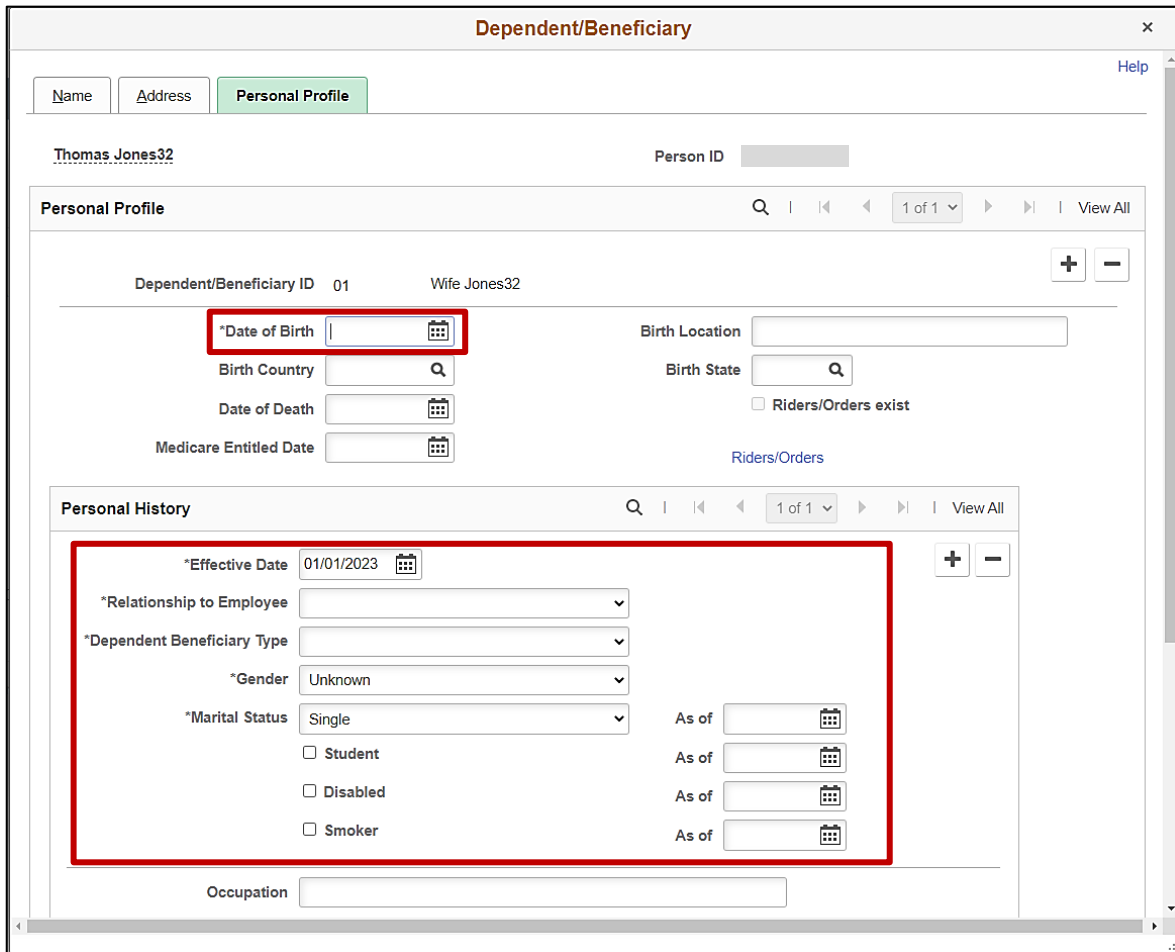
Same As Employee	Phone Type	Telephone	Extension	Preferred		
<input type="checkbox"/>	[Dropdown]	[Text]	[Text]	<input type="checkbox"/>	[+]	[-]

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

34. Click the **Personal Profile** tab.

BN361_Creating and Completing a Life Event on behalf of an Employee

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, the name "Thomas Jones32" and "Person ID" are displayed. 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 Location", "Birth Country", "Birth State", "Date of Death", and "Medicare Entitled Date". There are also search icons and a "Riders/Orders exist" checkbox.

The "Personal History" section is also highlighted with a red box. It contains several dropdown menus: "*Effective Date" (01/01/2023), "*Relationship to Employee", "*Dependent Beneficiary Type", and "*Gender" (Unknown). There are also checkboxes for "Student", "Disabled", and "Smoker". To the right of these fields are "As of" date pickers.

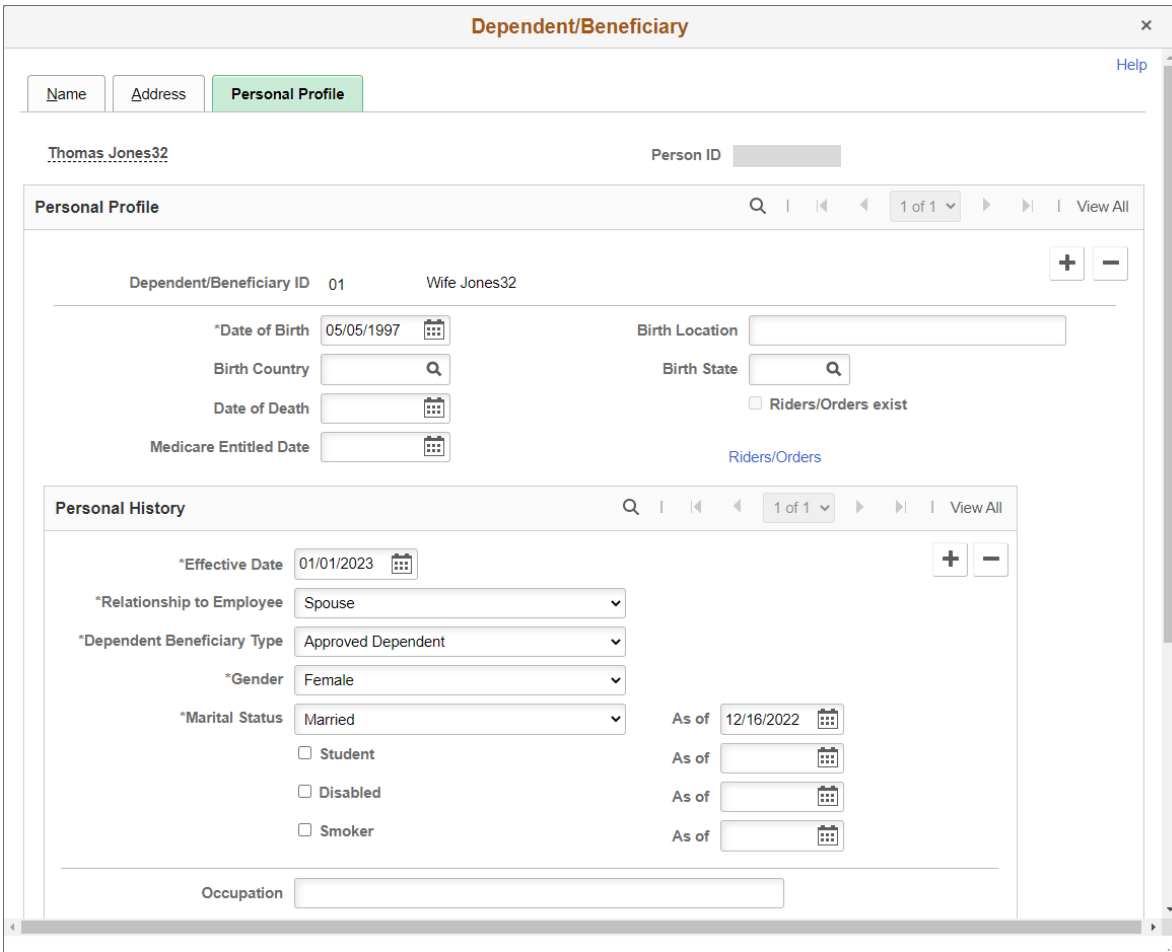
Note: The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this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

35. Click the **Date of Birth Calendar** icon and select the dependent's date of birth.
36. Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee ("Spouse" in this example).
37. Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent".
38. Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Female" in this example).

BN361_Creating and Completing a Life Event on behalf of an Employee

39. The **Marital Status** field defaults to “Single”. Updated as needed for the dependent (“Married” in this example).

Note: If any status other than “Single” is selected, select the applicable date using the **Marital Status As of Calendar** icon (“12/16/2022” in this example).



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, the name "Thomas Jones32" and "Person ID" are displayed. The main content area is divided into two sections: "Personal Profile" and "Personal History".

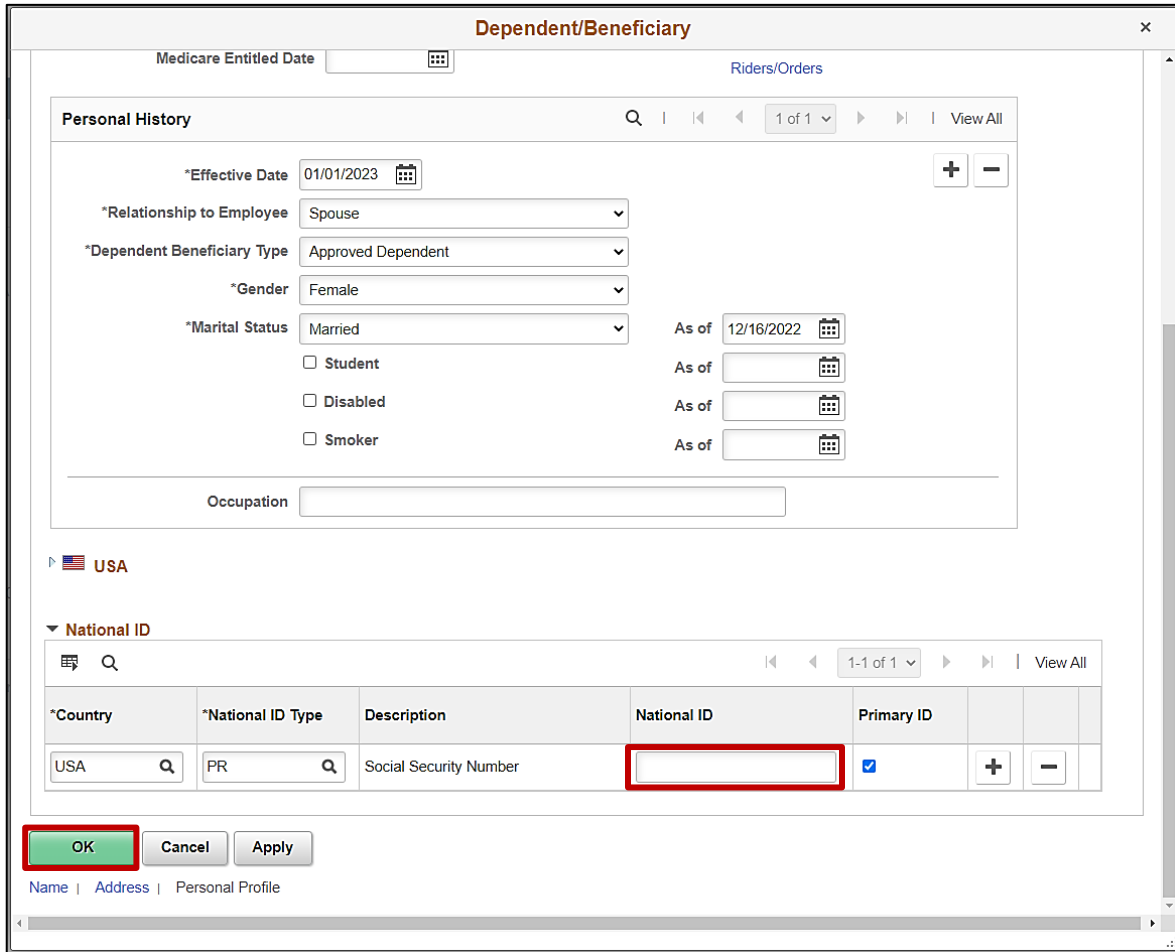
Personal Profile Section:

- Dependent/Beneficiary ID: 01
- Wife Jones32
- *Date of Birth: 05/05/1997
- Birth Location: [Text Field]
- Birth Country: [Text Field]
- Birth State: [Text Field]
- Date of Death: [Text Field]
- Medicare Entitled Date: [Text Field]
- Riders/Orders exist
- [Riders/Orders](#)

Personal History Section:

- *Effective Date: 01/01/2023
- *Relationship to Employee: Spouse
- *Dependent Beneficiary Type: Approved Dependent
- *Gender: Female
- *Marital Status: Married
- Student
- Disabled
- Smoker
- As of: 12/16/2022
- As of: [Text Field]
- As of: [Text Field]
- As of: [Text Field]
- Occupation: [Text Field]

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

BN361_Creating and Completing a Life Event on behalf of an Employee


The screenshot shows a web form titled "Dependent/Beneficiary". At the top, there is a "Medicare Entitled Date" field and a "Riders/Orders" link. Below this is a "Personal History" section with a search bar and "1 of 1" indicator. The form contains several fields:

- *Effective Date: 01/01/2023
- *Relationship to Employee: Spouse
- *Dependent Beneficiary Type: Approved Dependent
- *Gender: Female
- *Marital Status: Married
- As of: 12/16/2022
- Other "As of" fields are present but empty.
- Occupation: (empty field)

 Below the personal history is a "National ID" section with a search bar and "1-1 of 1" indicator. It contains a table with the following data:

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

 At the bottom of the form, there are three buttons: "OK" (highlighted with a red box), "Cancel", and "Apply". Navigation links for "Name", "Address", and "Personal Profile" are also visible.

41. 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.

42. Click the **OK** button.

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Dependents / Beneficiaries** tab redisplays.

×
Help

Event / Participant Selection
Option Election
Dependents / Beneficiaries

Schedule ID	EM00	Employee ID	Thomas Jones32
Event ID	2	Event Data	01/01/2023 Marriage
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
Jones32,Wife	Spouse	Approved Dependent	05/05/1997

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-----------------------------------

OK
Cancel
Apply

Refresh

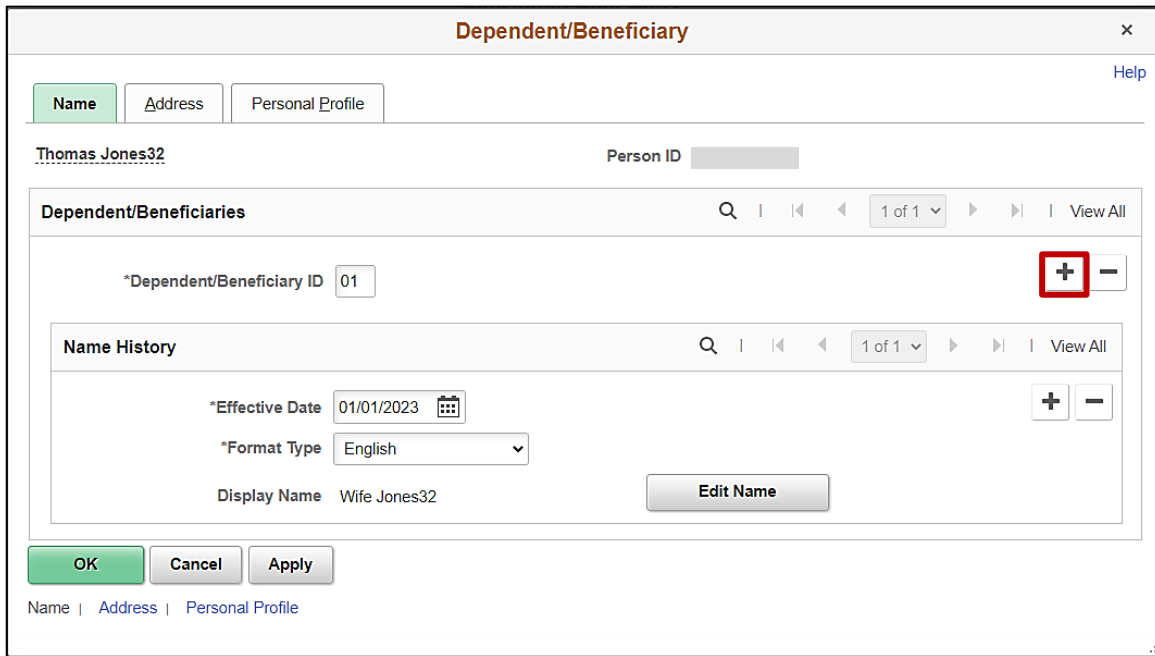
Event / Participant Selection
Option Election
Dependents / Beneficiaries

Note: The dependent just added displays in the **Dependent/Beneficiaries Currently on Record** section. If additional dependents need to be added (i.e; birth of twins, adding stepchildren as a result of marriage, etc.), proceed with Step 42. If no additional dependents need to be added, skip to Step 44.

43. In this scenario, a stepchild will be added. Click the **Change/Add Dependent Data** link.

BN361_Creating and Completing a Life Event on behalf of an Employee

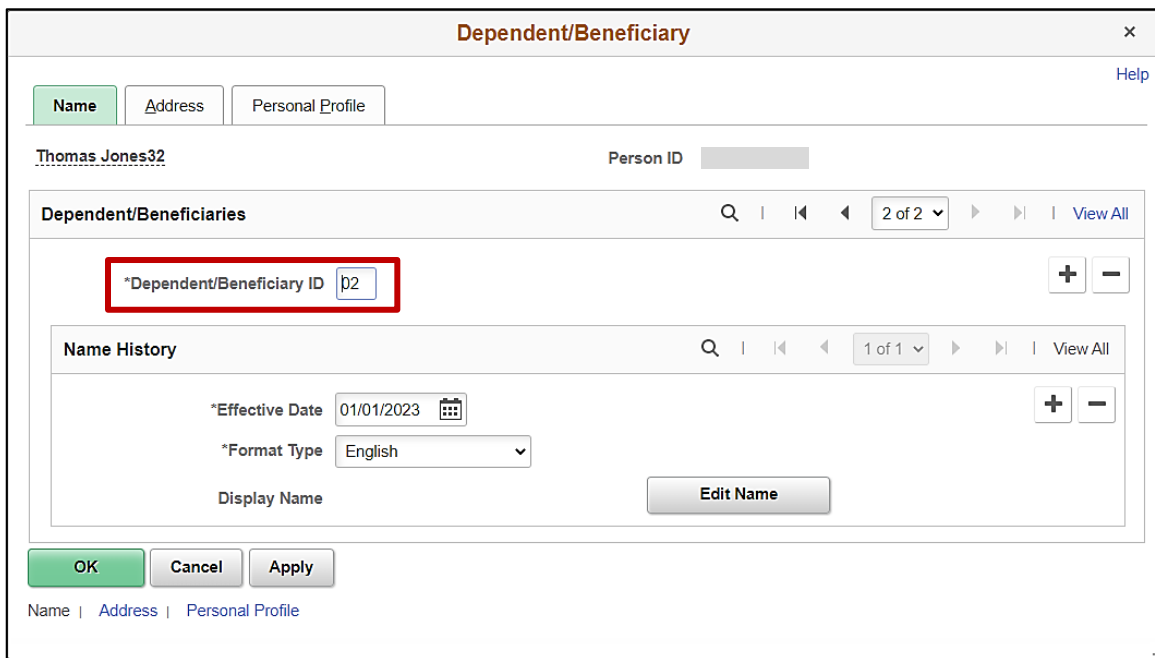
The **Name** tab redisplay.



The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The form displays the name 'Thomas Jones32' and a 'Person ID' field. Below this is a table for 'Dependent/Beneficiaries' with one row. The 'Add a New Row' icon (+) is highlighted with a red box. The 'Name History' section below the table shows the effective date '01/01/2023', format type 'English', and display name 'Wife Jones32'. There are 'OK', 'Cancel', and 'Apply' buttons at the bottom.

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

The page refreshes with a new row.



The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The form displays the name 'Thomas Jones32' and a 'Person ID' field. Below this is a table for 'Dependent/Beneficiaries' with two rows. The 'Add a New Row' icon (+) is highlighted with a red box. The 'Name History' section below the table shows the effective date '01/01/2023', format type 'English', and display name. There are 'OK', 'Cancel', and 'Apply' buttons at the bottom.

45. The **Dependent/Beneficiary ID** field increments by "1" ("02" in this example as this is the second dependent being added). Repeat Steps 26 - 41 to complete the data entry for the next dependent and then repeat Steps 26 – 44 as needed until all dependents have been added.



BN361_Creating and Completing a Life Event on behalf of an Employee

BenAdmin Data Entry [x] [Help](#)

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

Schedule ID EM00 Employee ID [redacted] Thomas Jones32
Event ID 2 Event Data 01/01/2023 Marriage
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
Jones32,Wife	Spouse	Approved Dependent	05/05/1997
Thomas54,Stepchild	Stepchild	Approved Dependent	05/22/2015

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-----------------------------------

OK Cancel Apply Refresh

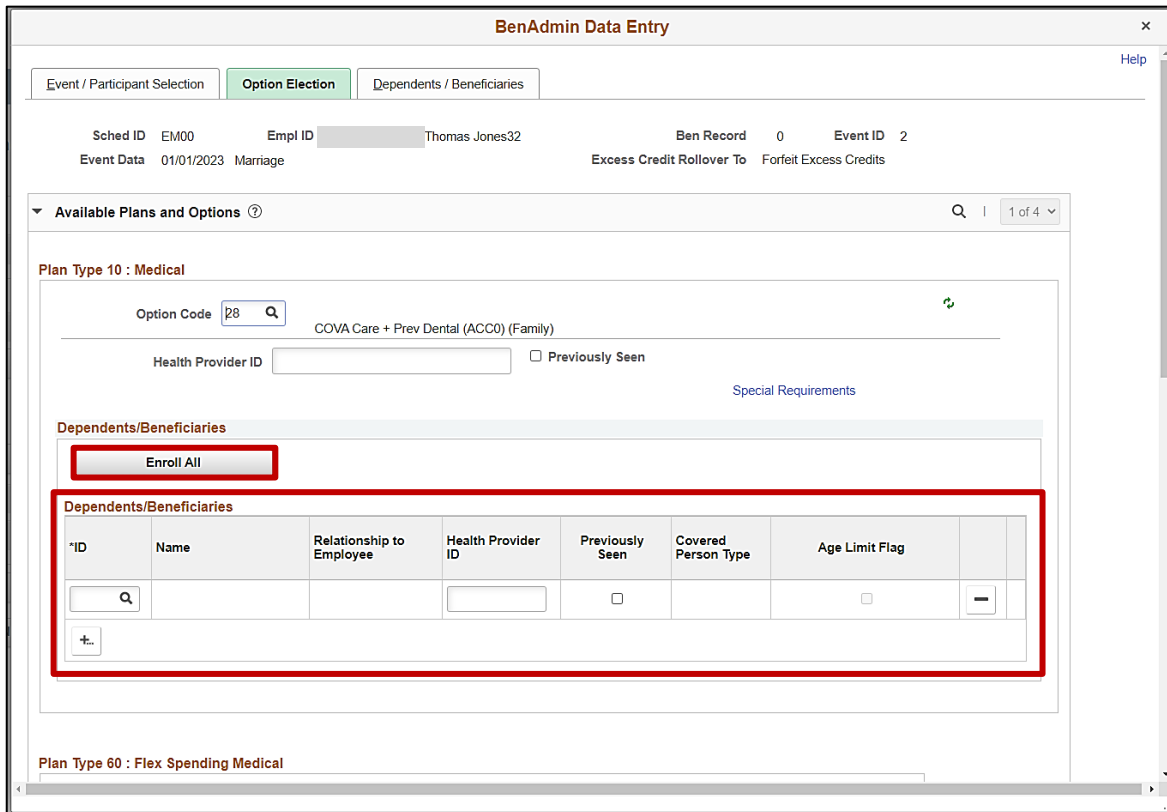
Event / Participant Selection | Option Election | Dependents / Beneficiaries

Note: All dependents that have been added display in the **Dependent/Beneficiaries Currently on Record** section (spouse and a stepchild in this example).

46. Click the **Option Election** tab.

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Option Election** tab redisplays.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] Thomas Jones32 Ben Record 0 Event ID 2
Event Data 01/01/2023 Marriage Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ② 1 of 4

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

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

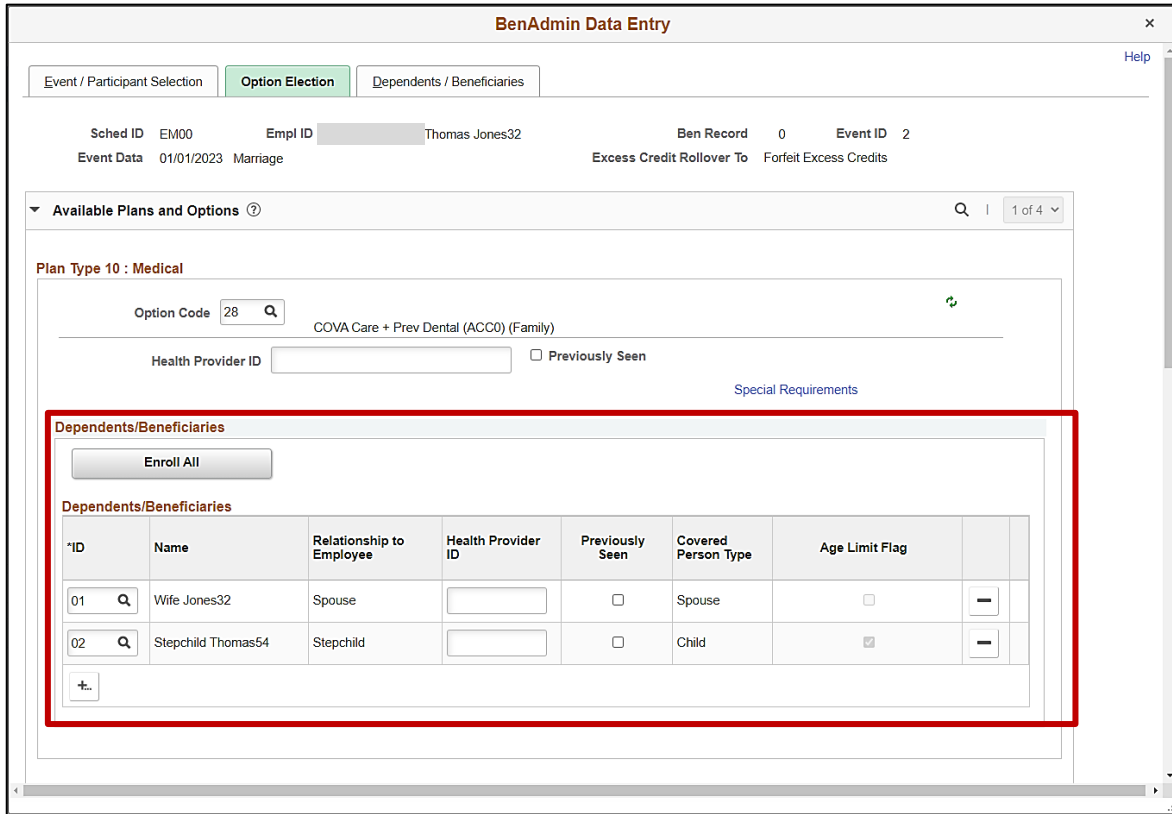
Plan Type 60 : Flex Spending Medical

47. Next, enroll the dependent(s) 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 (+...)

BN361_Creating and Completing a Life Event on behalf of an Employee

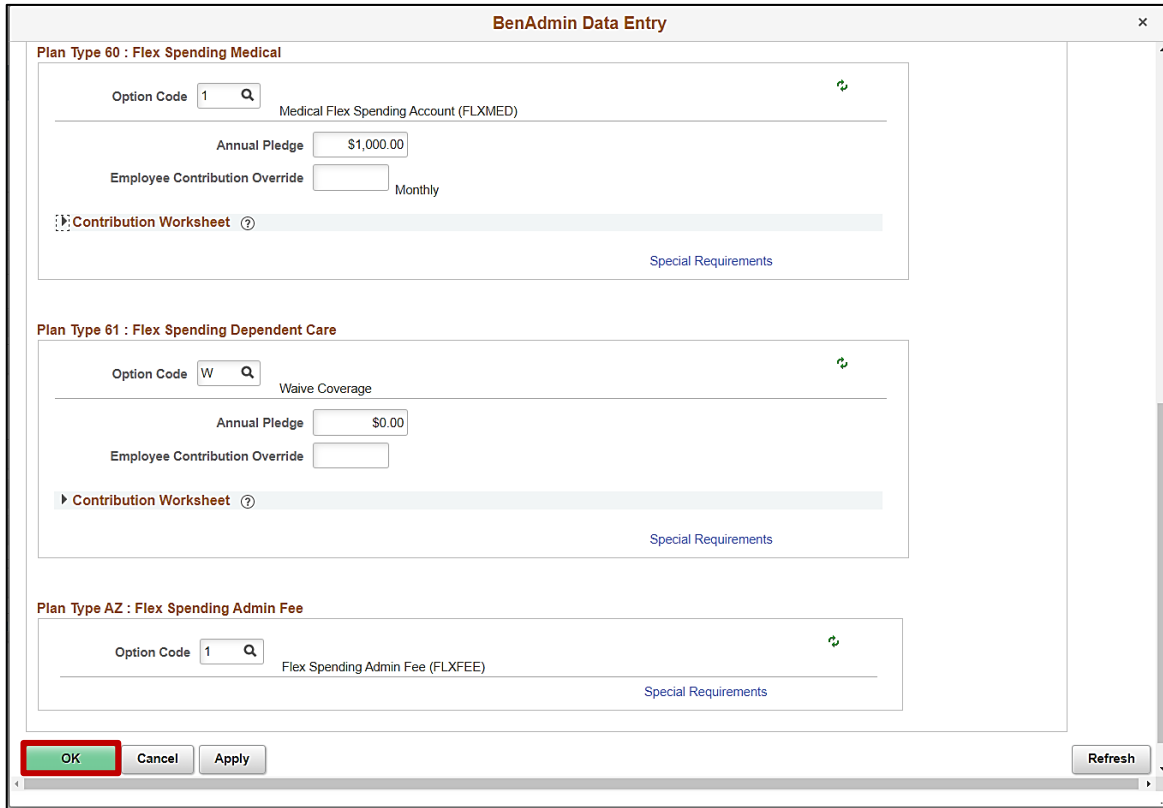
The page refreshes.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The 'Dependents/Beneficiaries' section is highlighted with a red box. It contains an 'Enroll All' button and a table of dependents/beneficiaries.

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Wife Jones32	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Stepchild Thomas54	Stepchild		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

48. The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.
49. Click the vertical scrollbar to scroll down on the page.

BN361_Creating and Completing a Life Event on behalf of an Employee


BenAdmin Data Entry

Plan Type 60 : Flex Spending Medical

Option Code Medical Flex Spending Account (FLXMED)

Annual Pledge

Employee Contribution Override Monthly

Contribution Worksheet ?

Special Requirements

Plan Type 61 : Flex Spending Dependent Care

Option Code Waive Coverage

Annual Pledge

Employee Contribution Override

Contribution Worksheet ?

Special Requirements

Plan Type AZ : Flex Spending Admin Fee

Option Code Flex Spending Admin Fee (FLXFEE)

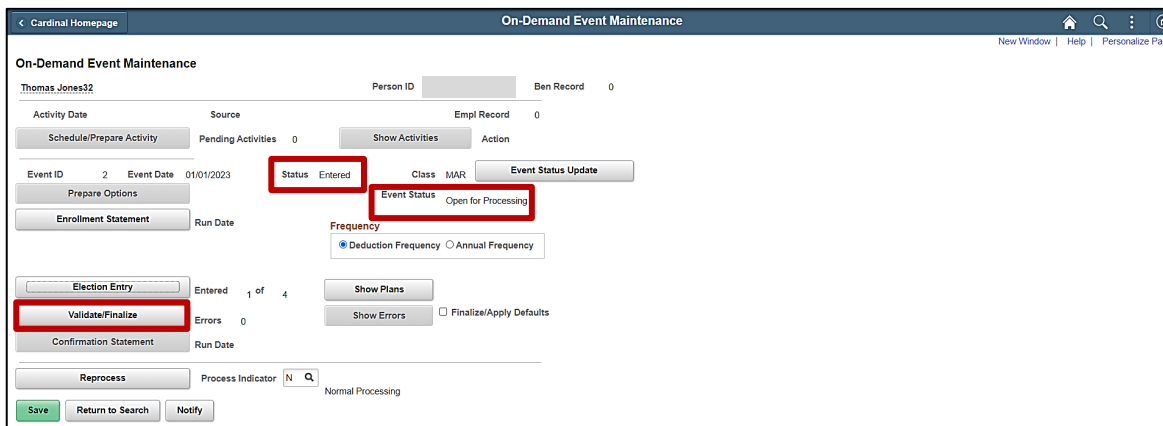
Special Requirements

OK Cancel Apply Refresh

50. Review the employee’s FSA elections and make updates as needed based on the information provided by the employee (in this example, the employee is not making any updates to their FSA elections).

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

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



On-Demand Event Maintenance

Thomas Jones32 Person ID [redacted] Ben Record 0

Activity Date Source Pending Activities 0 Show Activities Action

Event ID 2 Event Date 01/01/2023 Status Entered Class MAR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 1 of 4 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

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

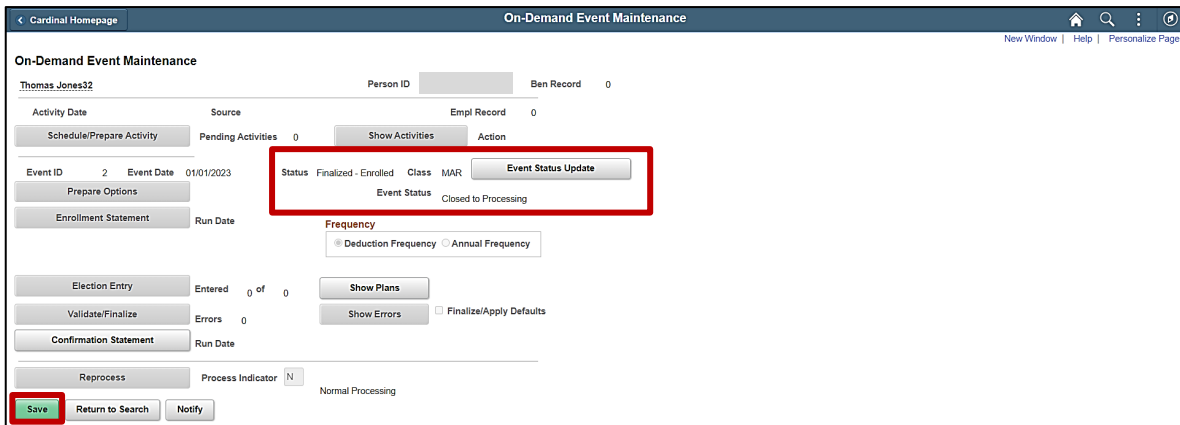
BN361_Creating and Completing a Life Event on behalf of an Employee

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.



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



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

53. Click the **Save** button.

This process is now complete. Refer to the [Viewing the Employee's Benefit Information](#) section of this Job Aid to validate accuracy. Refer to the [Viewing/Printing a Confirmation Statement](#) if you need to print the Confirmation Statement for the employee.

Creating and Processing a Life Event on behalf of an Employee (Removing Dependent(s))

This section of the Job Aid should be referenced when you are creating and processing a Life Event on behalf of the employee wherein one or more dependents is being removed from the employee's coverage (divorce, death, etc.). The steps included in this section of the Job Aid are based on the following example scenario:

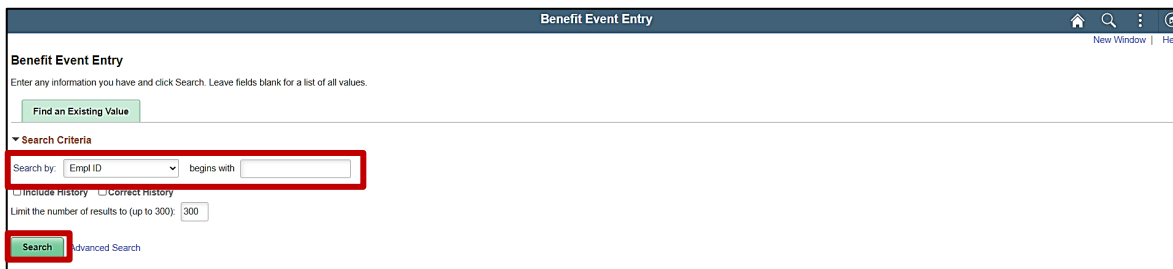
Scenario: An employee got divorced on 6/8/2023. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 6/9/2023 to remove their ex-spouse from enrollment in their Health Plan. The children from the marriage are going to remain enrolled in the employee's Health Plan. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being removed from the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

1. First, the Benefit Event must be created. Access the **Benefit Event** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Search** page displays.



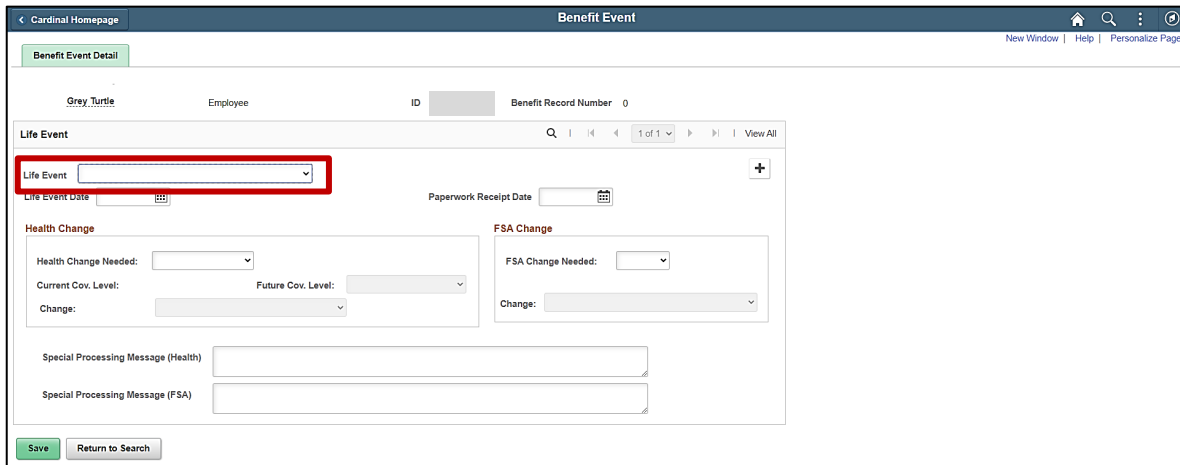
2. Enter the employee's Employee ID in the **Search by** field.

Note: The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.

3. Click the **Search** button.

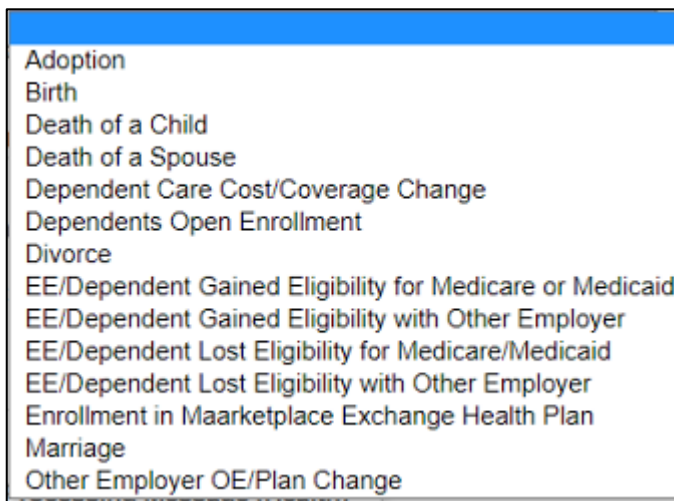
BN361_Creating and Completing a Life Event on behalf of an Employee

The **Benefit Event** page displays for the applicable employee.



4. Click the **Life Event** dropdown button.

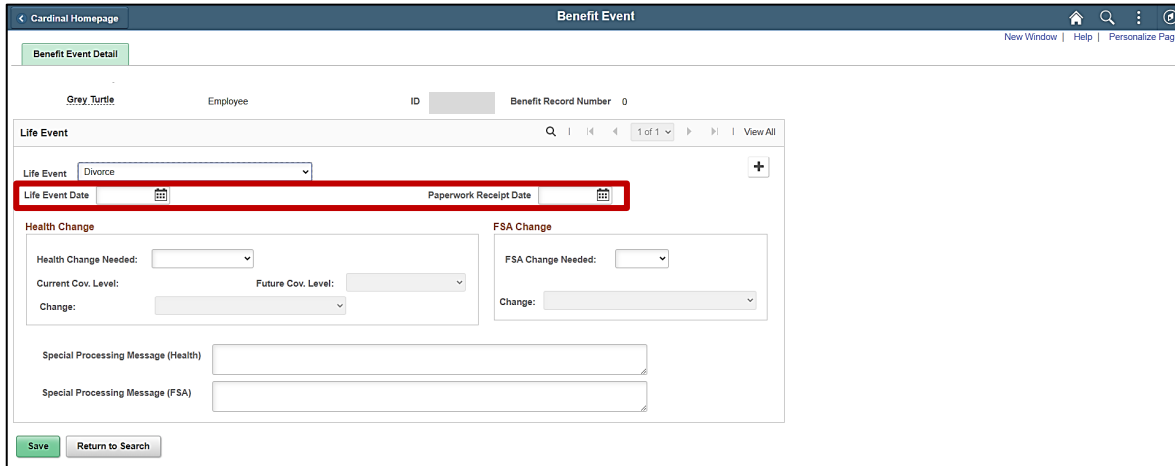
The **Life Event** menu displays.



5. Select the applicable type of Life Event by clicking the corresponding list item (“Divorce” in this scenario).

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Benefit Event** page redisplay with the selected Life Event.



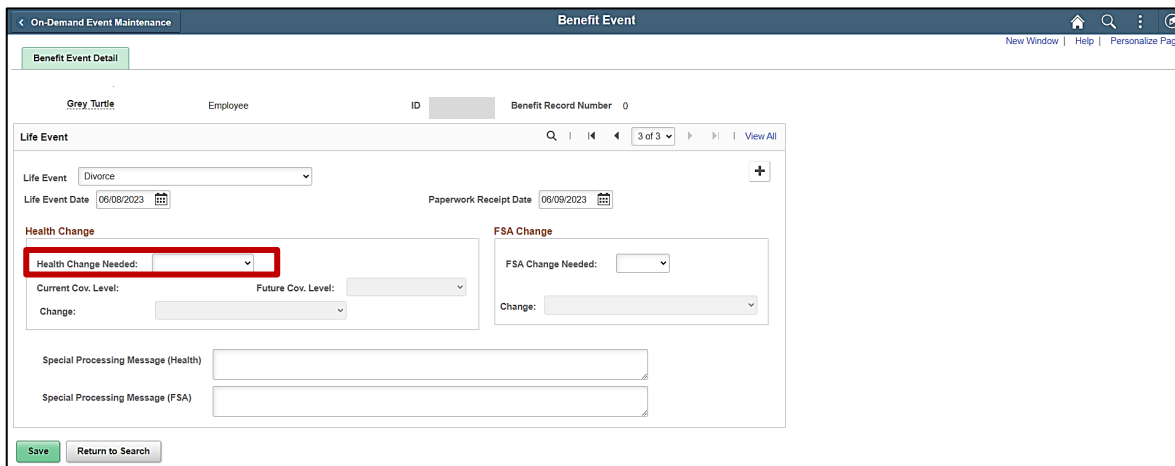
The screenshot shows the 'Benefit Event' page for an employee named 'Grey Turtle'. The 'Life Event' dropdown is set to 'Divorce'. The 'Life Event Date' and 'Paperwork Receipt Date' fields are highlighted with a red box. Below these fields are sections for 'Health Change' and 'FSA Change', each with a 'Health Change Needed' dropdown and a 'Change' dropdown. There are also text boxes for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. At the bottom, there are 'Save' and 'Return to Search' buttons.

6. Click the **Life Event Date Calendar** icon and select the applicable date (“4/26/2023” in this scenario).

Note: This is the date of the actual event (marriage, birth, divorce, etc.).

7. Click the **Paperwork Receipt Date Calendar** icon and select the applicable date (“5/1/2023” in this scenario).

Note: This is the date that the Benefits Enrollment form was received from the employee.

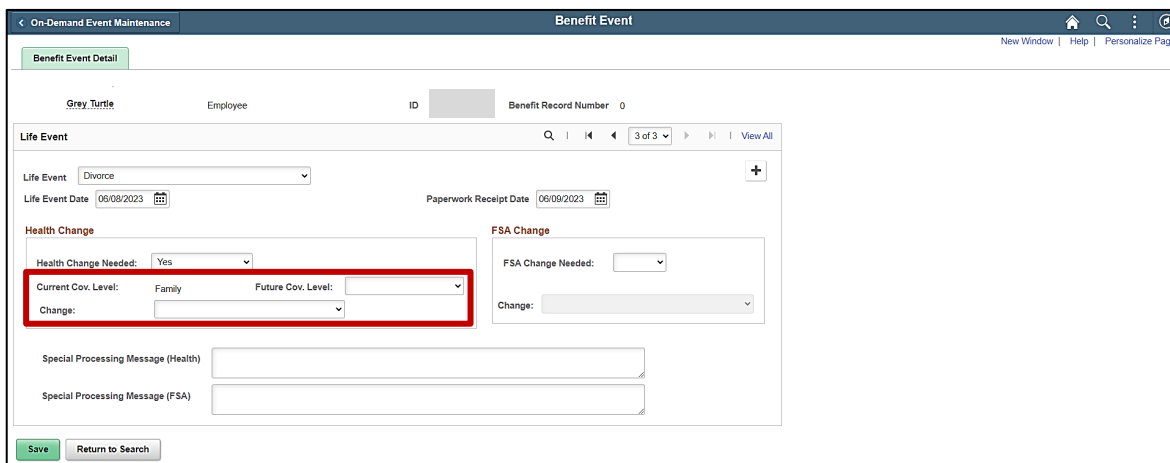


The screenshot shows the 'Benefit Event' page for an employee named 'Grey Turtle'. The 'Life Event' dropdown is set to 'Divorce'. The 'Life Event Date' is now populated with '06/08/2023' and the 'Paperwork Receipt Date' is populated with '06/09/2023'. The 'Health Change Needed' dropdown is highlighted with a red box. Below these fields are sections for 'Health Change' and 'FSA Change', each with a 'Health Change Needed' dropdown and a 'Change' dropdown. There are also text boxes for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. At the bottom, there are 'Save' and 'Return to Search' buttons.

BN361_Creating and Completing a Life Event on behalf of an Employee

8. Click the **Health Change Needed** dropdown button and select the applicable answer based on the following:
 - If the Life Event does require a change in the Health Plan Coverage Code for the employee, select “Yes” (i.e; this is a divorce event and the employee will still cover one child dependent (change from “Family” coverage to “Employee + CH” coverage)).
 - Even if the Life Event does not require a change in the Health Plan Coverage Code, but, it will require changes to the covered dependent(s), select “Yes”. If “Yes” is not selected, a Benefit Event will not be created.

The page refreshes.

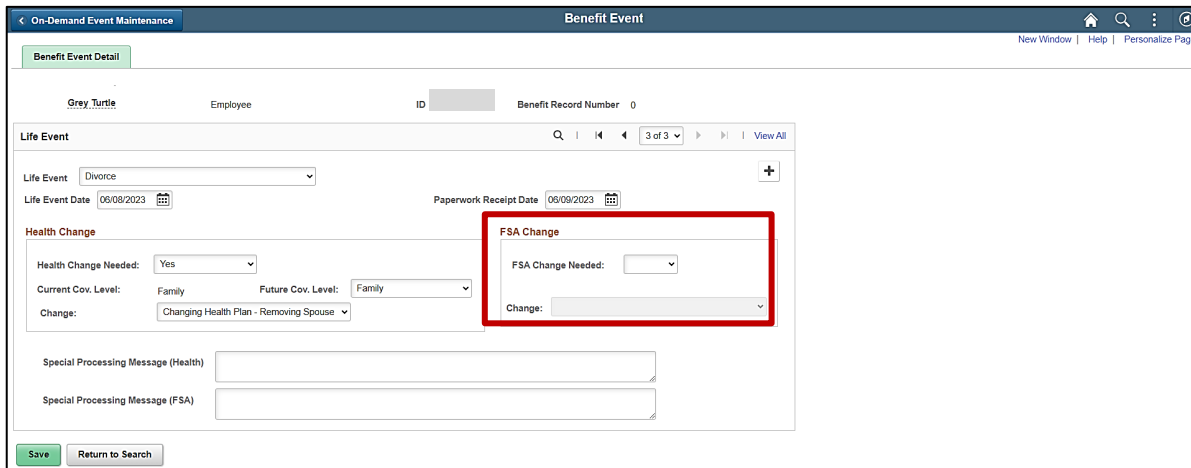


Note: The **Current Cov. Level** field auto-populates with the employee’s current Health Plan enrollment coverage level.

9. Click the **Future Cov. Level** dropdown button and select the applicable coverage level.

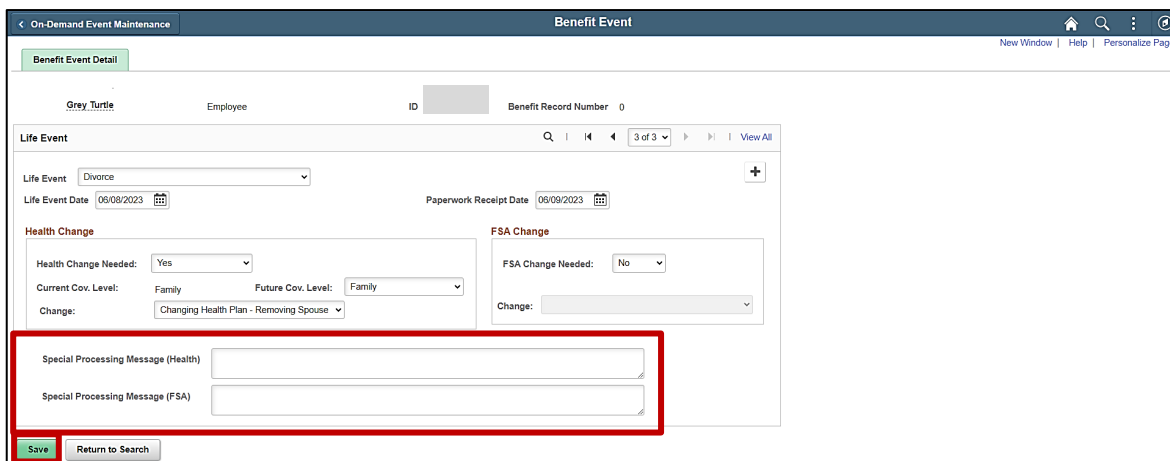
Note: The coverage levels available for selection are “Single, Employee”, “Employee + Spouse”, “Employee + CH (Child)”, and “Family”. Please not that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed.
10. Click the **Change** dropdown button and select the applicable list item (“Existing Health Plan – Removing Spouse” in this scenario).

Note: The selections available will vary based on the type of Life Event previously selected.

BN361_Creating and Completing a Life Event on behalf of an Employee

The screenshot shows the 'Benefit Event' form for employee Grey Turtle. The 'Life Event' is set to 'Divorce' with a date of 06/09/2023. The 'FSA Change' section is highlighted with a red box and contains the following fields: 'FSA Change Needed' (dropdown menu) and 'Change' (dropdown menu). The 'Health Change' section is also visible, with 'Health Change Needed' set to 'Yes', 'Current Cov. Level' set to 'Family', and 'Future Cov. Level' set to 'Family'. The 'Change' dropdown is set to 'Changing Health Plan - Removing Spouse'. There are also text boxes for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. At the bottom, there are 'Save' and 'Return to Search' buttons.

11. Complete the fields within the **FSA Change** section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee's FSA elections will be made for this scenario).



The screenshot shows the 'Benefit Event' form for employee Grey Turtle. The 'Life Event' is set to 'Divorce' with a date of 06/09/2023. The 'FSA Change' section is now set to 'FSA Change Needed: No'. The 'Special Processing Message (Health)' and 'Special Processing Message (FSA)' fields are highlighted with a red box. At the bottom, there are 'Save' and 'Return to Search' buttons.

12. Click the **Save** button.
13. After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions.

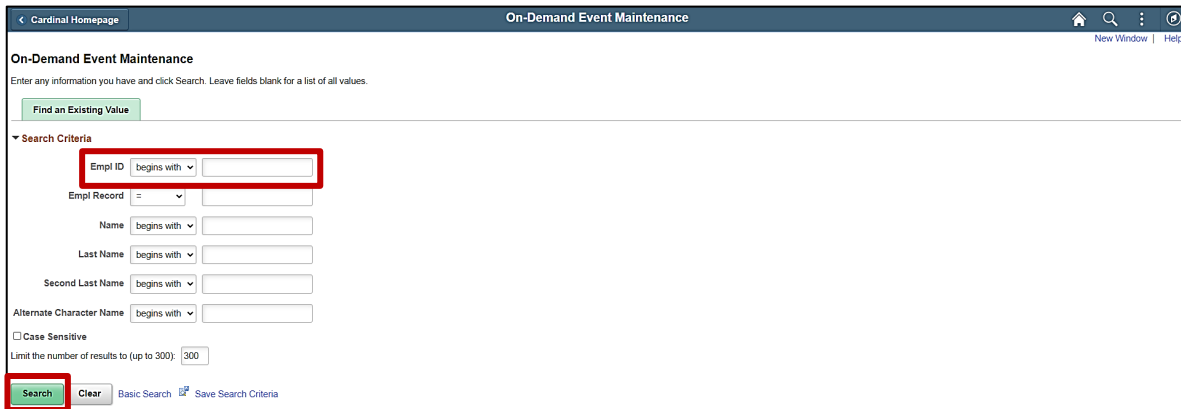
Note: If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the **Special Processing Message (Health)** field and/or the **Special Processing Message (FSA)** field.

BN361_Creating and Completing a Life Event on behalf of an Employee

14. The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed. 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.

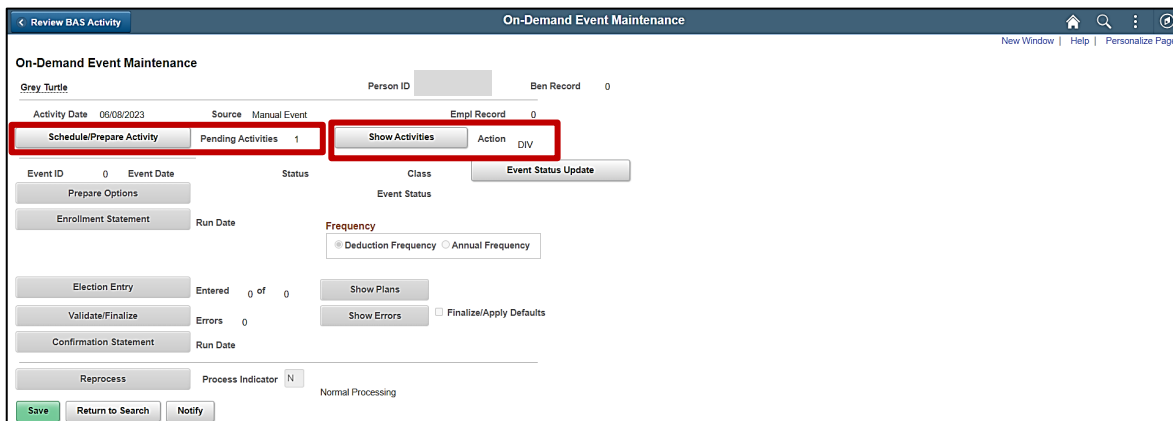


15. Enter the employee's Employee ID in the **Empl ID** field.

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.

16. Click the **Search** button.

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



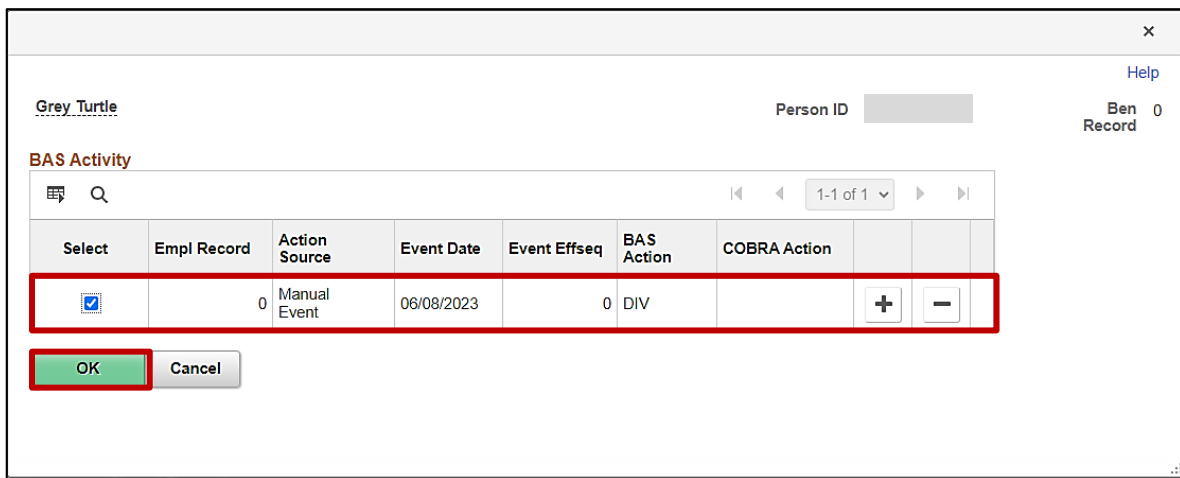
BN361_Creating and Completing a Life Event on behalf of an Employee

- Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a divorce, so the **Activity Date** field defaults to the date of divorce). Ensure that this date is accurate.

Note: The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“DIV” for Divorce in this scenario).

- Click the **Show Activities** button.

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

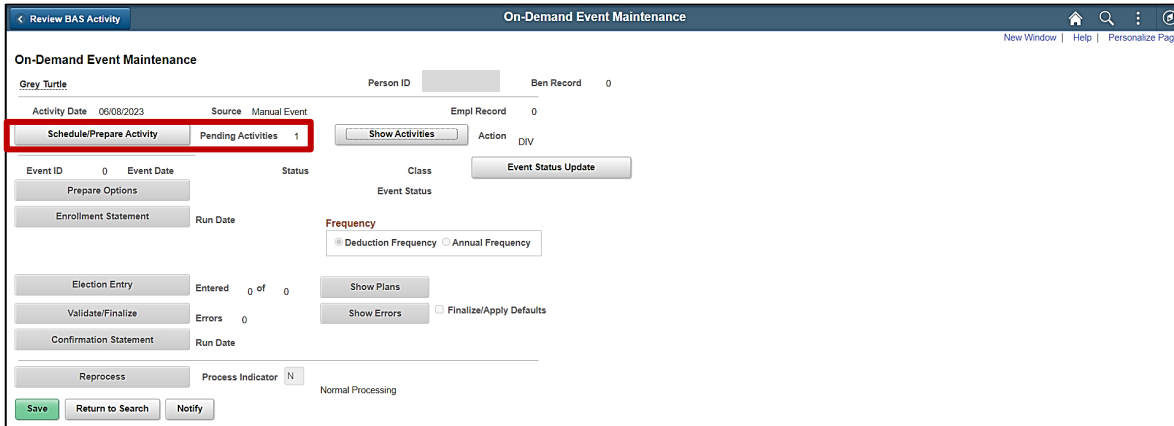


Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	06/08/2023	0	DIV	

- Ensure that the **Select** checkbox option for the Manual Event is selected and then click the **OK** button.

BN361_Creating and Completing a Life Event on behalf of an Employee

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



20. If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a “0”. In this case, proceed to Step 21. If the **Pending Activities** field displays a “1”, 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.

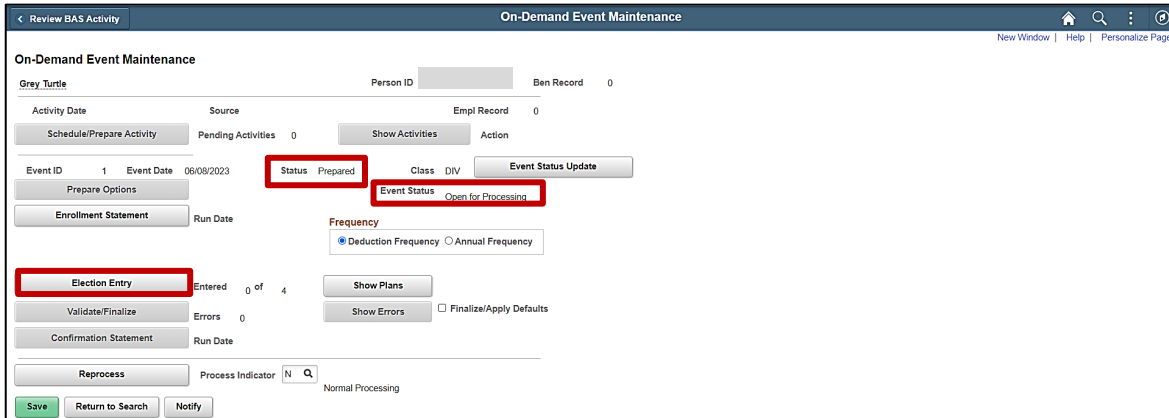
A **Confirmation** message displays in a pop-up window once the automated program completes.



21. Click the **OK** button.

BN361_Creating and Completing a Life Event on behalf of an Employee

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



On-Demand Event Maintenance

Grey Turtle Person ID [] Ben Record 0

Activity Date [] Source [] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 06/08/2023 Status Prepared Class DIV Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 0 of 4 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

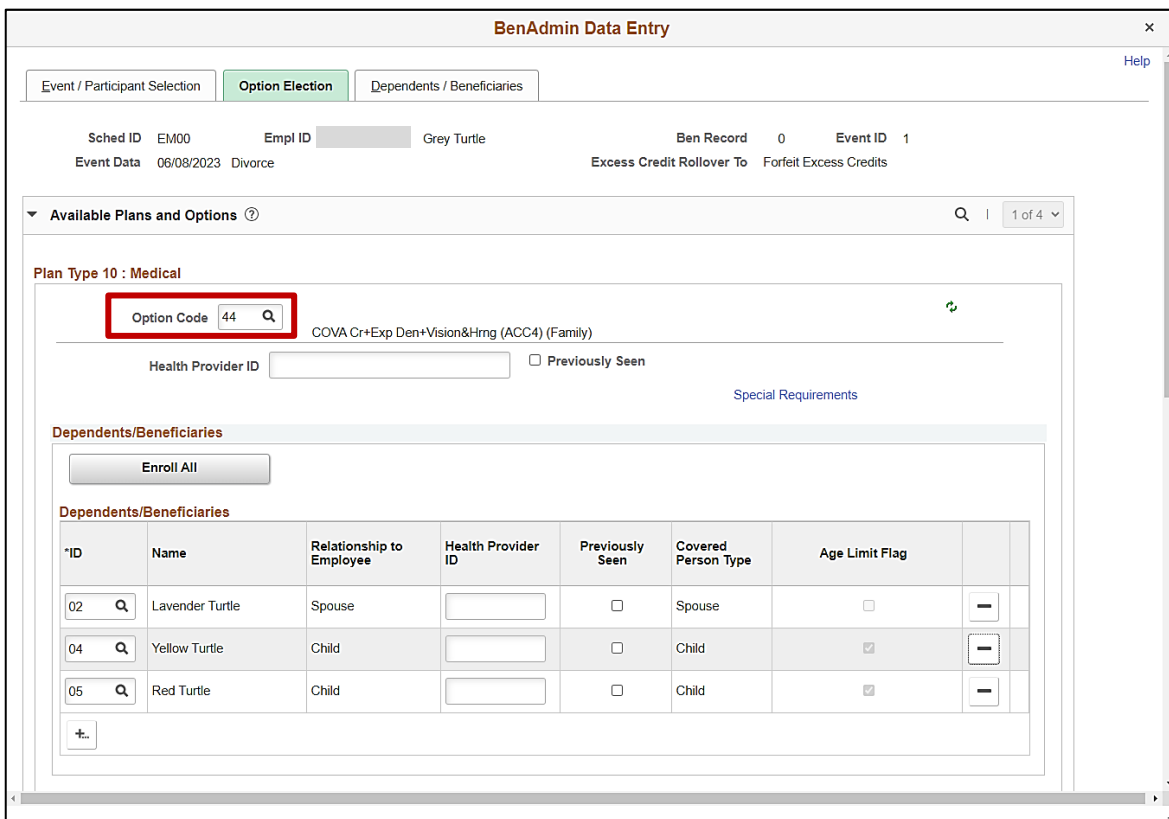
Reprocess Process Indicator N Q Normal Processing

Save Return to Search Notify

22. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

23. Click the **Election Entry** button.

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



BenAdmin Data Entry

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

Sched ID EM00 Empl ID Grey Turtle Ben Record 0 Event ID 1

Event Data 06/08/2023 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 4

Plan Type 10 : Medical

Option Code 44 COVA Cr+Exp Den+Vision&Hmg (ACC4) (Family)

Health Provider ID Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

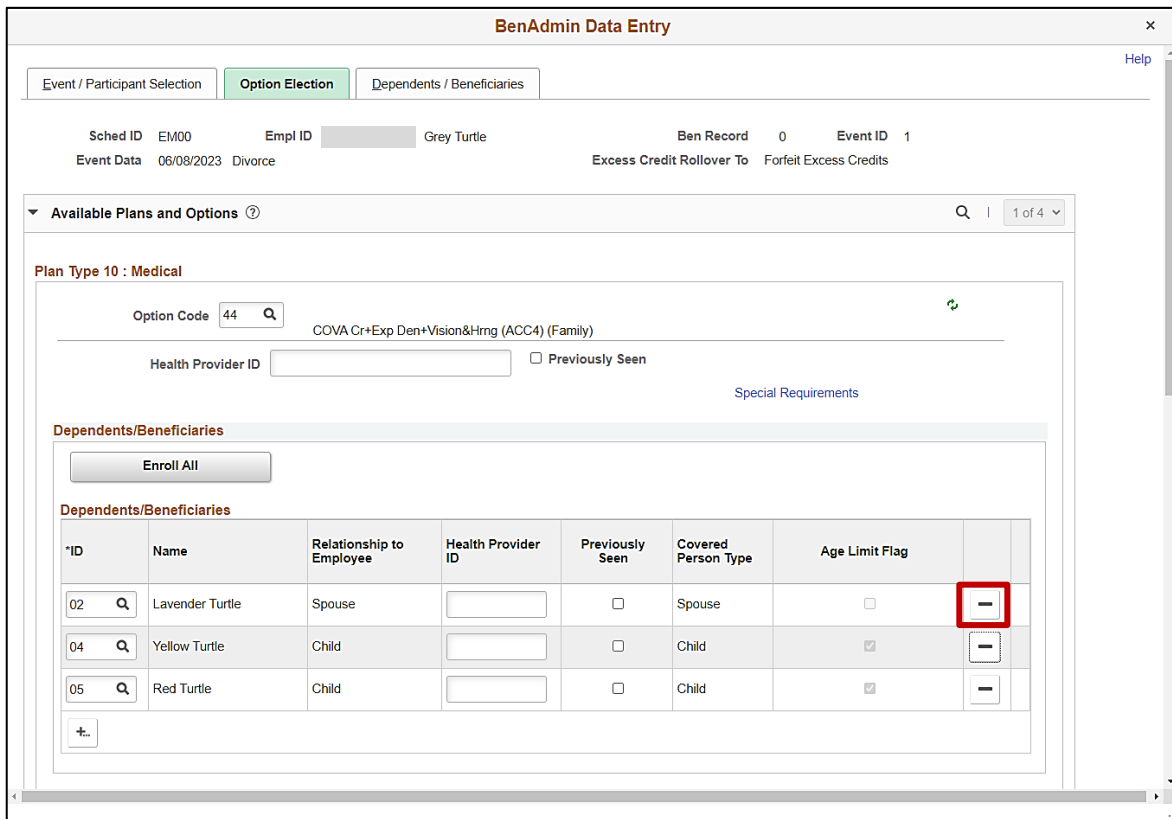
Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
02	Lavender Turtle	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
04	Yellow Turtle	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>
05	Red Turtle	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

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BN361_Creating and Completing a Life Event on behalf of an Employee

24. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form as needed by clicking the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and then selecting the applicable Medical Plan (in this scenario, the employee has two children dependents that are not being removed and therefore, the Medical Plan does not need to be updated).



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [Redacted] Grey Turtle Ben Record 0 Event ID 1
 Event Data 06/08/2023 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 4

Plan Type 10 : Medical

Option Code 44 COVA Cr+Exp Den+Vision&Hmg (ACC4) (Family)

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

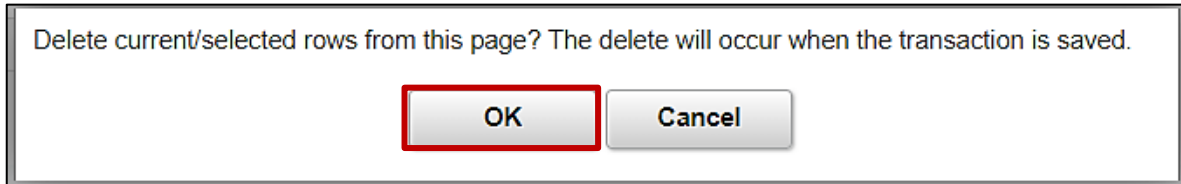
Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
02 <input type="text"/>	Lavender Turtle	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>
04 <input type="text"/>	Yellow Turtle	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
05 <input type="text"/>	Red Turtle	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>

25. Next, remove the applicable dependent from the **Dependents/Beneficiaries** section by clicking the corresponding **Delete Row** icon (only the spouse is being removed in this scenario).

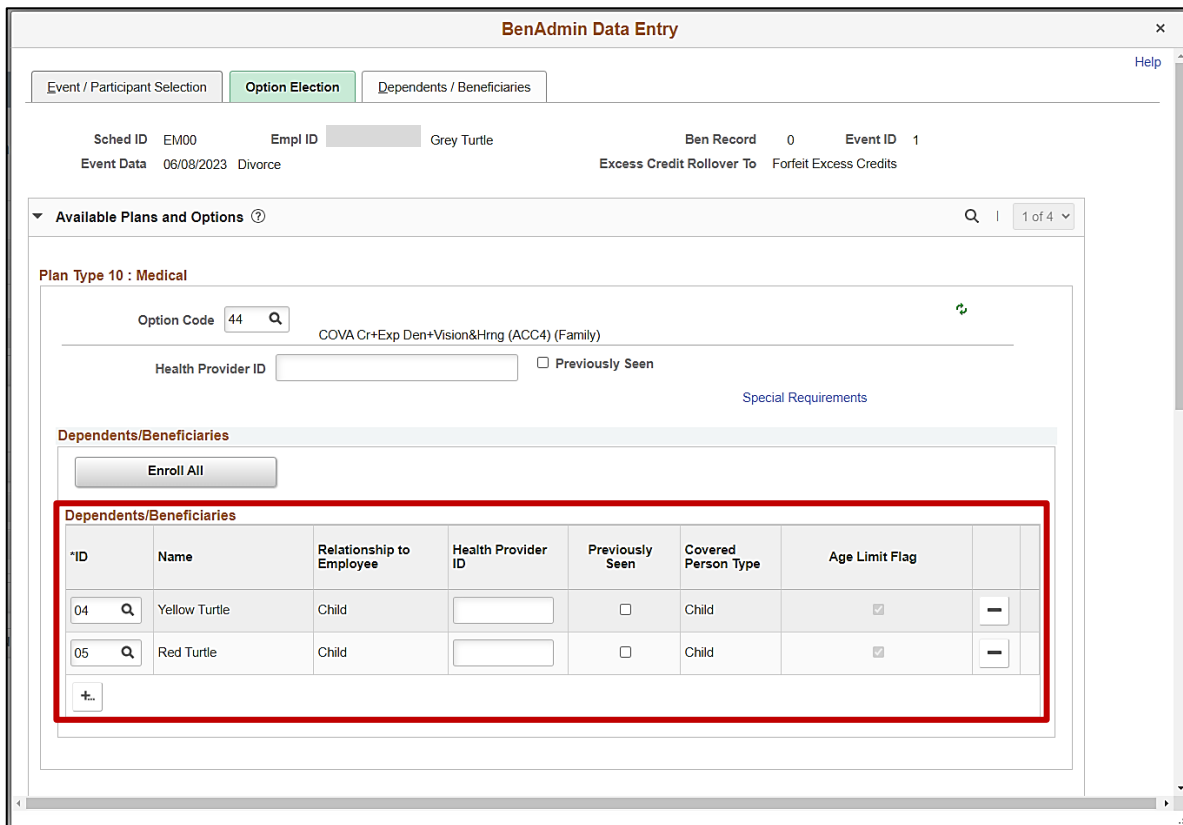
BN361_Creating and Completing a Life Event on behalf of an Employee

A **Decision** message displays in a pop-up window.



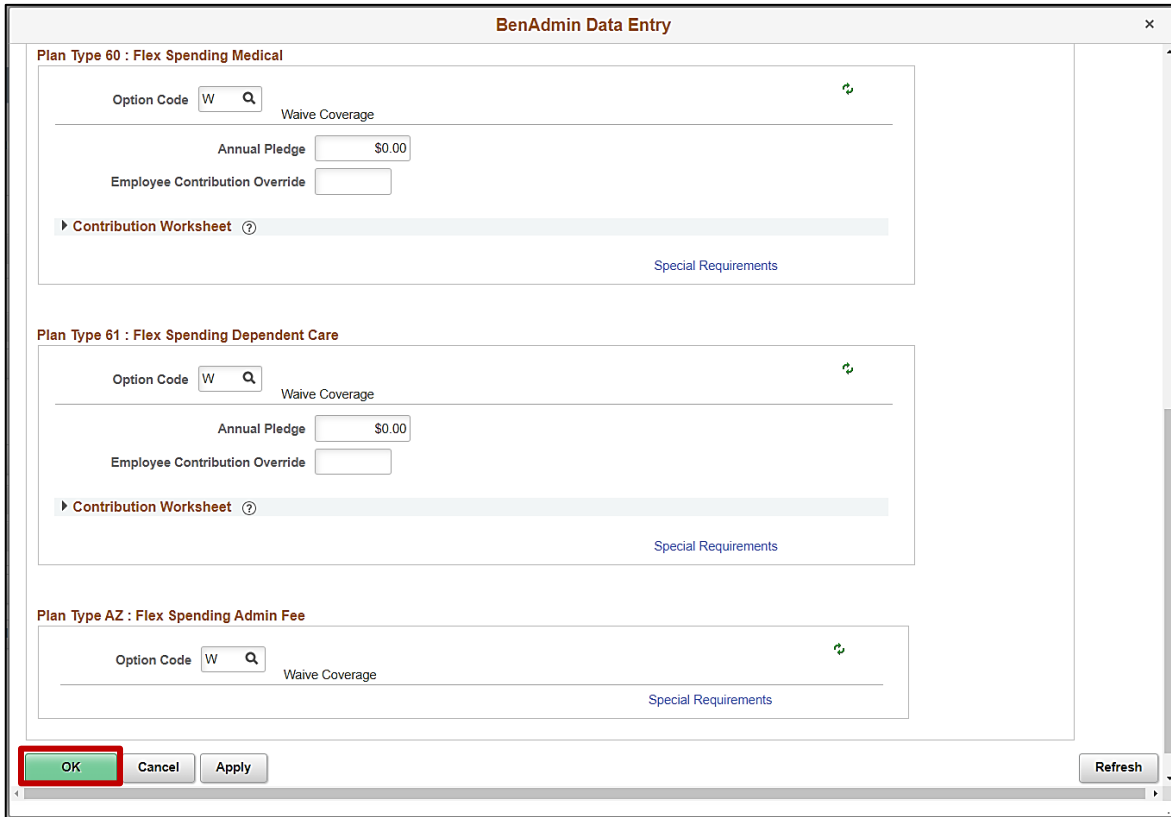
26. Click the **OK** button to confirm the removal of the dependent.

The **Option Election** tab redisplays.



Note: The removed dependent no longer displays in the **Dependents/Beneficiaries** section. Repeat Steps 24 and 25 to remove additional dependents as needed.

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

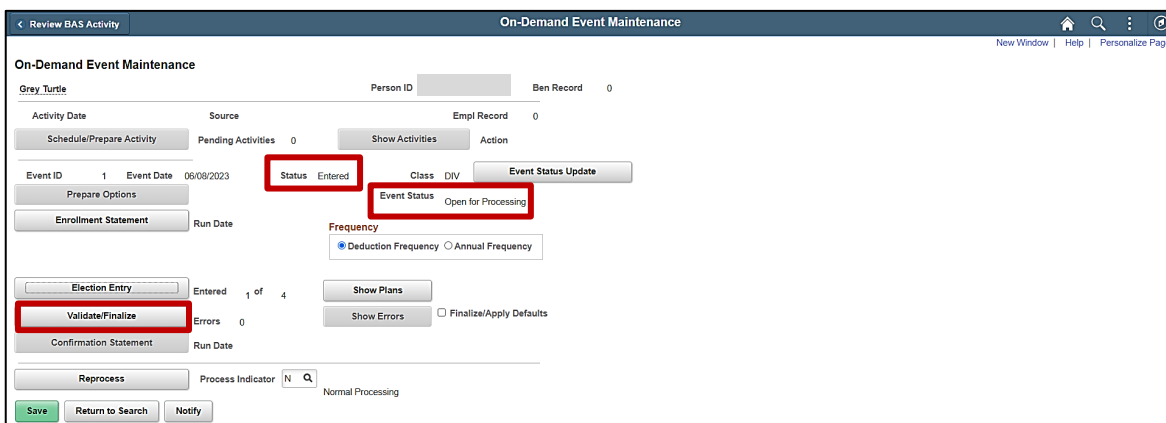
BN361_Creating and Completing a Life Event on behalf of an Employee


The screenshot shows the 'BenAdmin Data Entry' window with three sections for Plan Type 60, Plan Type 61, and Plan Type AZ. Each section contains an 'Option Code' field with a dropdown menu, a 'Waive Coverage' checkbox, an 'Annual Pledge' field with a value of '\$0.00', and an 'Employee Contribution Override' field. Below each section is a 'Contribution Worksheet' link and a 'Special Requirements' link. At the bottom of the window, the 'OK' button is highlighted with a red box, along with 'Cancel', 'Apply', and 'Refresh' buttons.

28. Review the employee’s FSA elections and make updates as needed based on the information provided by the employee (in this example, the employee is not making any updates to their FSA elections).

29. Once all elections have been made/updated, click the **OK** button.

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



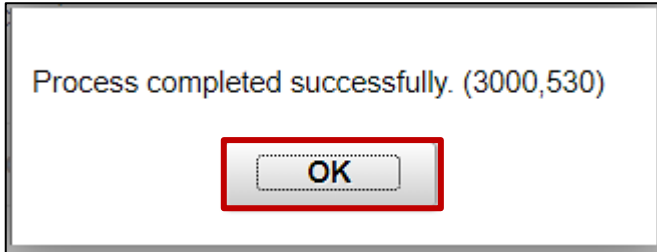
The screenshot shows the 'On-Demand Event Maintenance' page for 'Grey Turtle'. The page displays various fields and buttons. The 'Status' field is highlighted with a red box and shows 'Entered'. The 'Event Status' field is also highlighted with a red box and shows 'Open for Processing'. Other fields include 'Event ID' (1), 'Event Date' (06/08/2023), 'Class' (DIV), and 'Event Status Update' button. The 'Frequency' section has 'Deduction Frequency' selected. The 'Validate/Finalize' button is also highlighted with a red box. The 'Reprocess' button has a 'Process Indicator' dropdown set to 'N'.

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

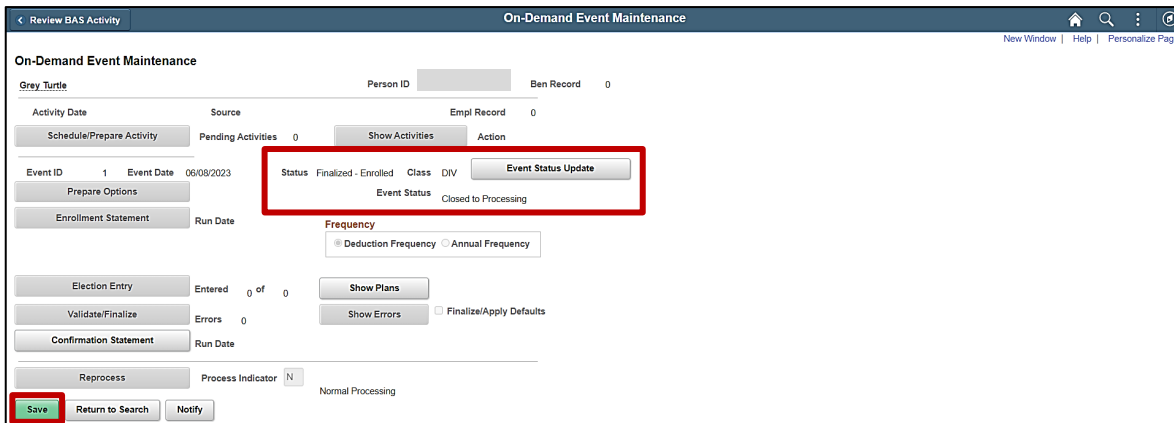
BN361_Creating and Completing a Life Event on behalf of an Employee

30. 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.



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



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

31. Click the **Save** button.

This process is now complete. Refer to the [Viewing the Employee's Benefit Information](#) section of this Job Aid to validate accuracy. Refer to the [Viewing/Printing a Confirmation Statement](#) if you need to print the Confirmation Statement for the employee.

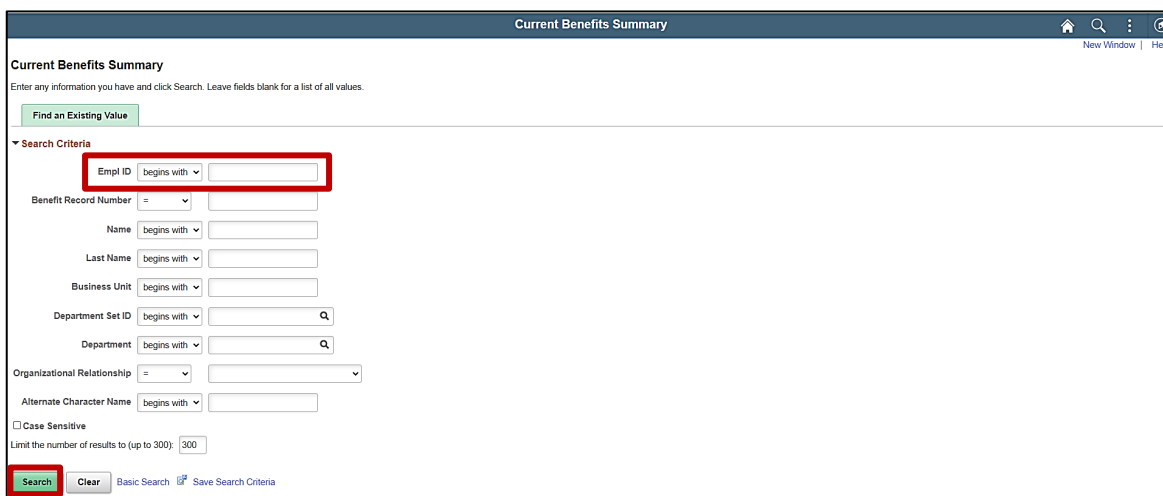
Viewing the Employee's Benefits Information

After completing a manual Benefit Event, the Benefits Administrator should view the employee's benefits information to ensure accuracy. This can be completed at any point after the Benefit Event has been finalized.

1. Access the **Current Benefits Summary** page using the following navigation path:

Menu > Benefits > Review Employee Benefits > Current Benefits Summary

The **Current Benefits Summary 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.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Current Benefits Summary** page displays for the applicable employee with the **Benefit Enrollment Summary** tab displayed by default.

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACC4	COVA EVH	Family	07/01/2022
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	05/25/2019
403(b)	Waive			Waived	10/01/2022
Section 457	Waive			Waived	10/01/2022
VRS Hb Vol Defined Contr	Elect	HVC050	HVC050	0.5% Before Tax	09/25/2022
Flex Spending Medical	Waive			Waived	07/01/2022
Flex Spending Dependent Care	Waive			Waived	07/01/2022
Employee Retirement DB	Elect	HVRMDB	VRS HB MDB	4% of Earnings	09/25/2022
Hybrid Retirement	Elect	HDBBER	HDBBER	0% of Earnings	09/25/2022
Group Term Life	Elect	GTLR	GTL Reg	0% of Earnings	09/25/2022

- Review the information within the **Current Enrollments** section and reconcile against the benefits enrollment form submitted by the employee to ensure accuracy.

Note: If any data entry errors are identified, refer to the Job Aid titled **BN361_Re-opening and Reprocessing a Benefit Event**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

- Click the **Benefit Deduction Summary** tab.

The **Benefit Deduction Summary** tab displays.

Plan Type	Benefit Plan	Dedn Code	Description	Class	Coverage Base	Last Deduction	Pay Period End
10	ACC4	CVACRE	COVACARE	Before-Tax		220.00	10/24/2022
				Nontaxable Benefit		929.50	10/24/2022
23	IMPLIF	IMPLIF	Imp Life	Taxable Benefit	184000.00	26.22	10/09/2022
4W	HVC050	HYBVDC	HYB VDC	Before-Tax		17.06	10/24/2022
				Nontaxable Btax Benefit		17.06	10/24/2022
70	HVRMDB	HVRMDB	HVRMDB	Before-Tax	3412.50	136.50	10/24/2022
				Nontaxable Benefit	3412.50	459.32	10/24/2022
7V	HDBBER	HDBBER	HYB Rmt	Nontaxable Benefit	442.28	442.28	10/24/2022
7W	GTLR	GRPLFR	Grp Life	Nontaxable Benefit	3412.50	45.73	10/24/2022
7X	RTCRRD	RETHCR	Ret Hith	Nontaxable Benefit	3412.50	38.22	10/24/2022

- Review the employee's pay group, payroll status, and deductions information to ensure accuracy. If any issues are identified, coordinate corrective action with an Agency HR Administrator and/or an Agency Payroll Administrator.

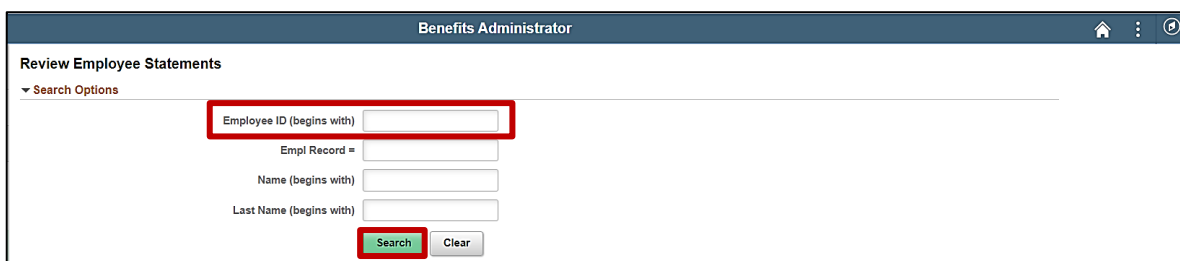
BN361_Creating and Completing a Life Event on behalf of an Employee**Viewing/Printing a Confirmation Statement**

After completing the benefits enrollment change, the employee should receive an email with their Confirmation Statement after the next Benefits Administration process runs. However, if the employee does not have an email defined in Cardinal yet, or did not receive the email, the Agency BA can follow the steps in this section to view and print a Confirmation Statement for the employee.

1. Access the **Current Benefits Summary** page using the following navigation path:

Benefits Administrator Tile > Review Employee Benefits > Review Employee Statements

The **Review Employee Statements Search** page displays.

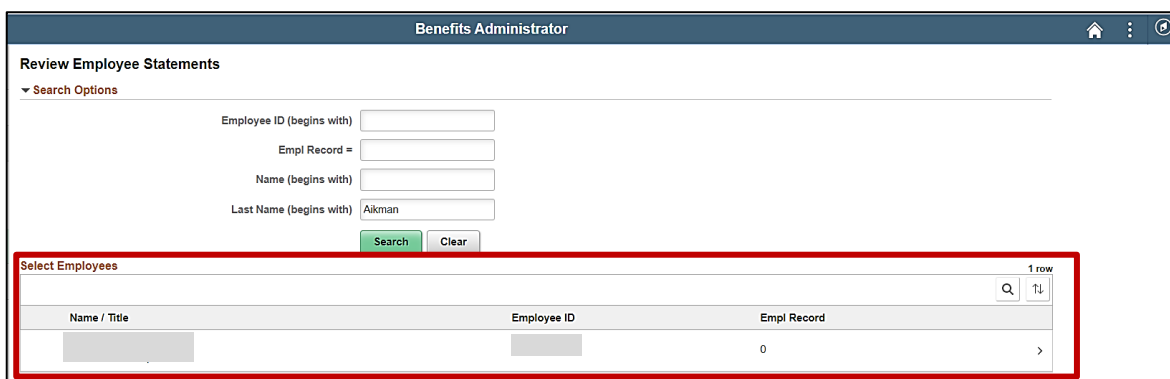


2. Enter the employee's Employee ID in the **Employee ID** field.

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 page refreshes with the search results displayed in the **Select Employees** section.

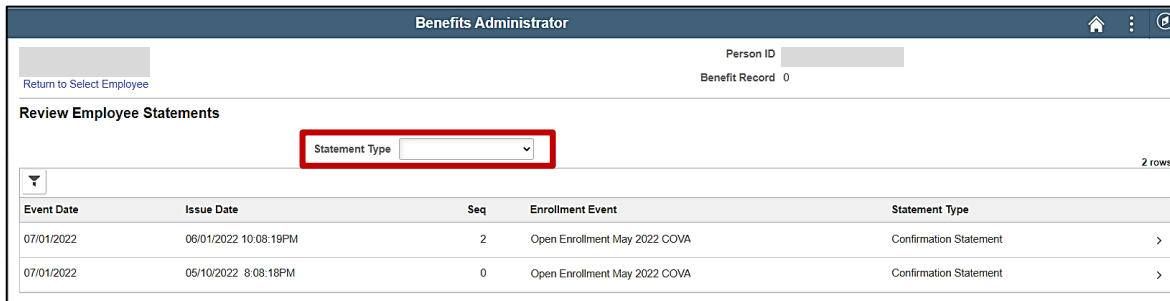


Name / Title	Employee ID	Empl Record
[REDACTED]	[REDACTED]	0

4. Click anywhere in the corresponding row for the employee within the **Select Employees** section.

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Review Employee Statements** page displays for the selected employee.



Benefits Administrator

Person ID [redacted]
Benefit Record 0

Return to Select Employee

Review Employee Statements

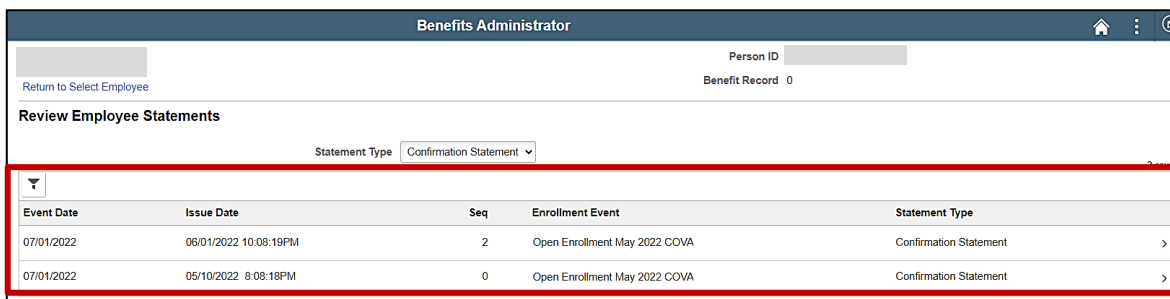
Statement Type [Confirmation Statement]

2 rows

Event Date	Issue Date	Seq	Enrollment Event	Statement Type
07/01/2022	06/01/2022 10:08:19PM	2	Open Enrollment May 2022 COVA	Confirmation Statement
07/01/2022	05/10/2022 8:08:18PM	0	Open Enrollment May 2022 COVA	Confirmation Statement

- Click the **Statement Type** dropdown button and select “Confirmation Statement”.

The page refreshes.



Benefits Administrator

Person ID [redacted]
Benefit Record 0

Return to Select Employee

Review Employee Statements

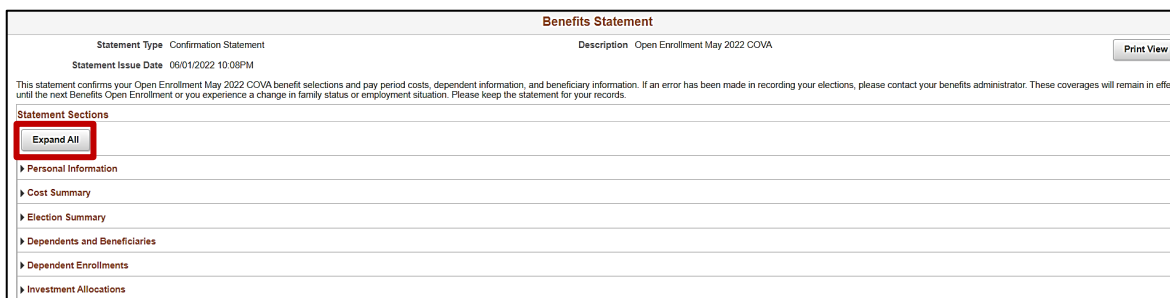
Statement Type [Confirmation Statement]

2 rows

Event Date	Issue Date	Seq	Enrollment Event	Statement Type
07/01/2022	06/01/2022 10:08:19PM	2	Open Enrollment May 2022 COVA	Confirmation Statement
07/01/2022	05/10/2022 8:08:18PM	0	Open Enrollment May 2022 COVA	Confirmation Statement

- Click anywhere in the corresponding row for the applicable Benefit Event (Open Enrollment May 2022 COVA (Seq Number 2) will be opened in this example).

The **Benefits Statement** page displays for the applicable Benefit Event.



Benefits Statement

Statement Type Confirmation Statement
Statement Issue Date 06/01/2022 10:08PM
Description Open Enrollment May 2022 COVA

This statement confirms your Open Enrollment May 2022 COVA benefits selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

Expand All

- Personal Information
- Cost Summary
- Election Summary
- Dependents and Beneficiaries
- Dependent Enrollments
- Investment Allocations

- Click the **Expand All** button to view the detailed information.



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes with the sections expanded.

Statement Type Confirmation Statement
Description Open Enrollment May 2022 COVA
Statement Issue Date 06/01/2022 10:08PM

This statement confirms your Open Enrollment May 2022 COVA benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

Personal Information
This is your personal information currently on file. It is important that the data shown is complete and correct. If this information is not correct, update the information through the Personal Information or contact your Benefits Administrator.

Contact Information

Name
Mailing Address
Email Address

Eligibility Information

Home Address
Gender
Marital Status
Birth Date
Service Date

Cost Summary
This is a summary of the cost of your benefits. Details are in the Election Summary section.

Your Cost Per Pay Period	\$ 93.00
Full Cost	\$ 110.00
Employer Cost	\$ 647.00

Medical

- Review the information as needed. Use the vertical scrollbar to scroll down and view all of the information.
- Click the **Print View** button.

The **Confirmation Statement** opens as a PDF document. If the Confirmation Statement does not display, you may need to allow pop-ups from the website.

BEN_Conf_Stemt.pdf
1 / 9 | 100% | Print

Cardinal

CONFIRMATION OF 2022 ELECTIONS
OPEN ENROLLMENT MAY 2022 COVA
Statement Issue Date: 06/01/2022

Employee ID: [REDACTED]

This statement confirms your recent benefit elections. These coverages will remain in effect until you experience a change in family status or in your employment situation. If an error has been made in recording your elections, please contact your benefits administrator. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address
Email Address
Gender
Marital Status
Birthdate

ELECTION SUMMARY

Benefit	Coverage	Category	Base	Your Cost Per Pay Period
COVA Care + Prev Dental	ET+Spouse			\$ 110.00
Flex Spending Medical				
Flex Spending Dependent Care				
Premium Reward Par & Spouse				\$ -17.00
Flex Spending Admin Fee				

*Cost Reflected above are per pay period for agencies paid by the cardinal system, monthly for all others

HEALTH DEPENDENTS

Name	Date of Birth	Relationship	Dependent Benefit Type
[REDACTED]	[REDACTED]	Spouse	Approved Dependent

DEPENDENTS ENROLLMENTS

Benefit Option	Dependent
COVA Care + Prev Dental	[REDACTED]

- Save and/or print the document as needed.