Completing a Manual Event Enrollment Overview

This Job Aid provides a walkthrough of the steps an Agency BA must complete to submit a manual benefit event on behalf of the employee. These steps include using the Review BAS Activity page to create the event and the On-Demand Event Maintenance Page to process the event. For qualifying life events not completed through ESS, the employee must submit a life event form along with the supporting documentation to the BA with all the information necessary to complete the benefit enrollment process.

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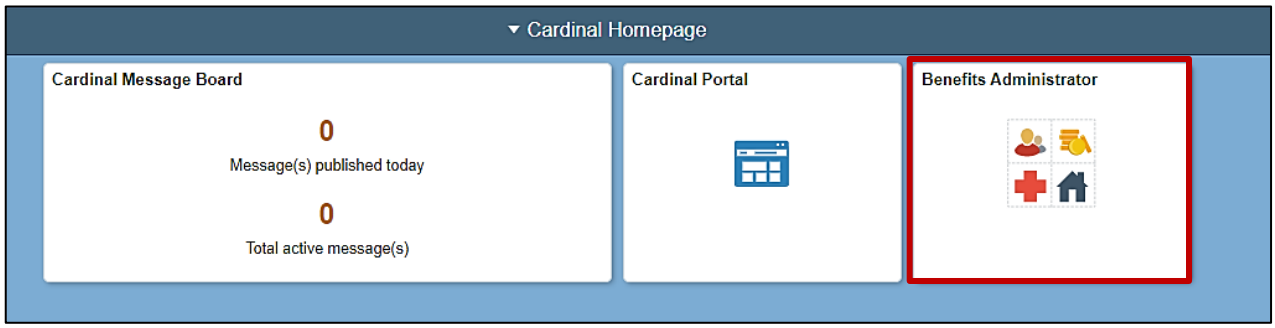
Manual Event for Benefit Enrollment

This job aid uses the following example scenario: An employee has submitted a life event form with supporting documentation for a marriage event to their Agency BA. The Agency BA must add the MAR manual event, add the spouse dependent, complete the updated benefit enrollment, and finalize the benefit event.

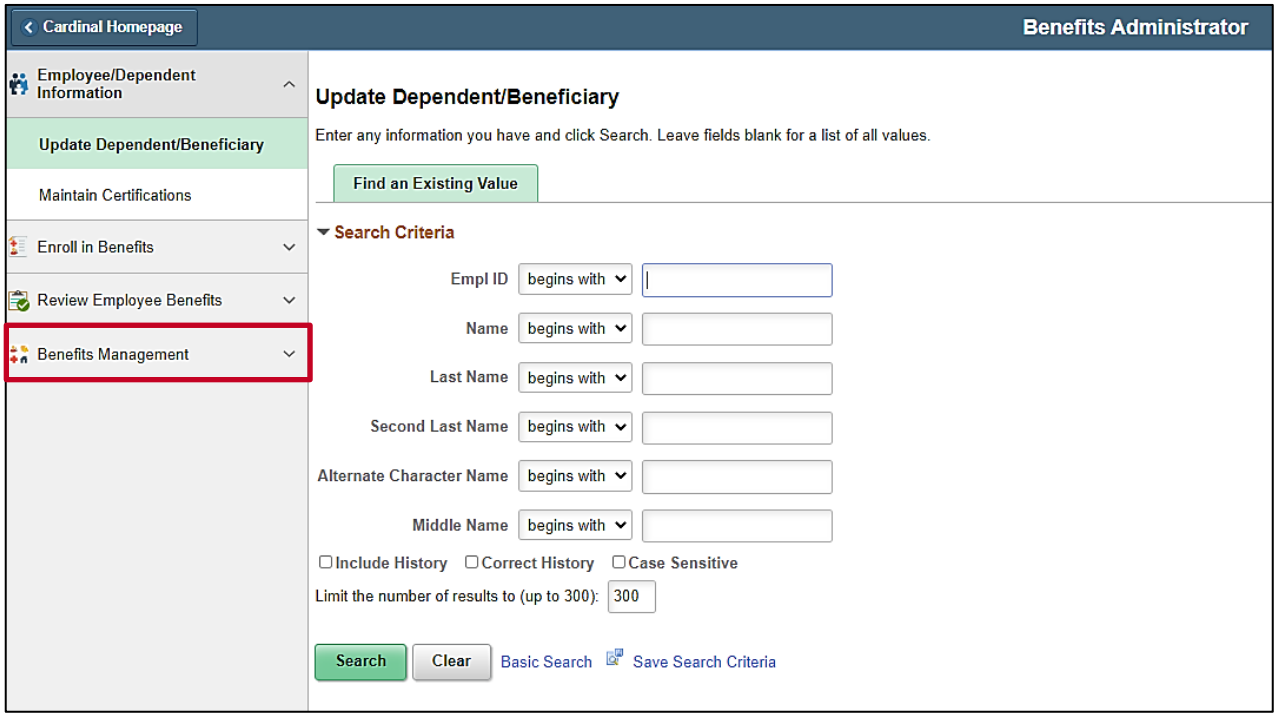
1. Navigate to the **Cardinal Homepage.**

The **Cardinal Homepage** displays.



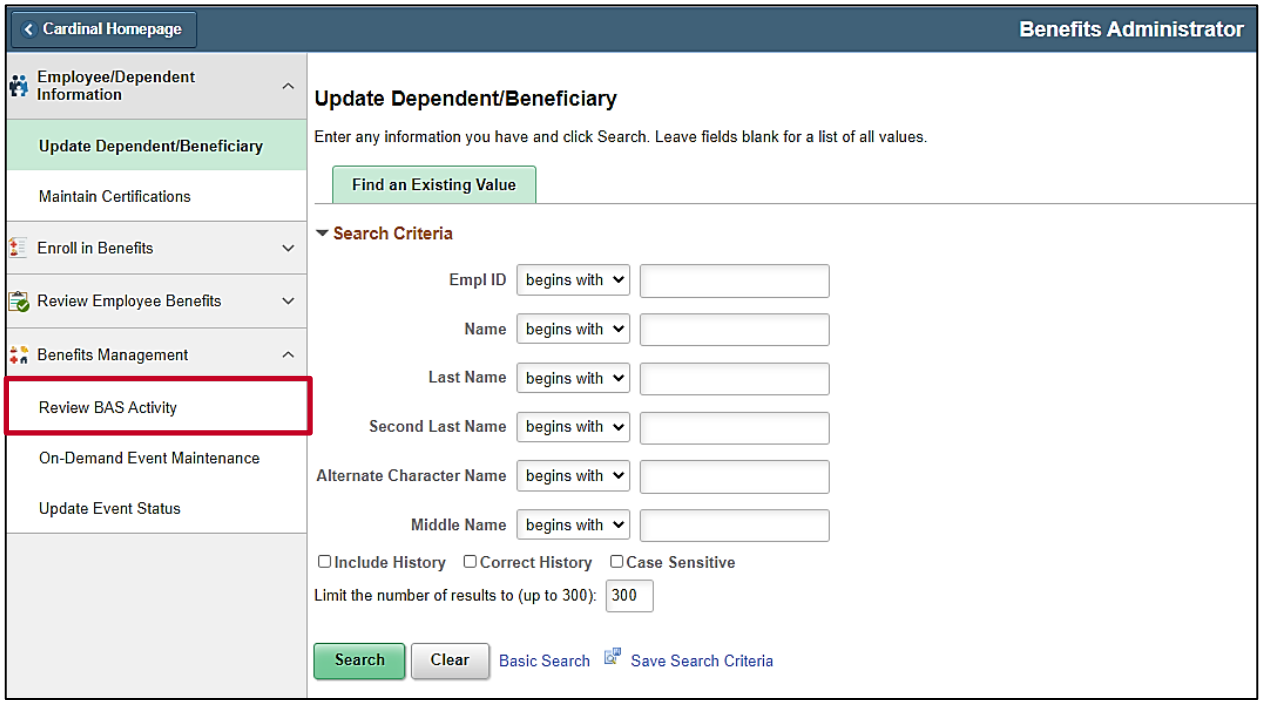
2. Click on the **Benefit Administrator tile** on the Cardinal Homepage.

The **Benefits Administration** page displays with the **Employee Dependent/Beneficiary** tab displayed by default.



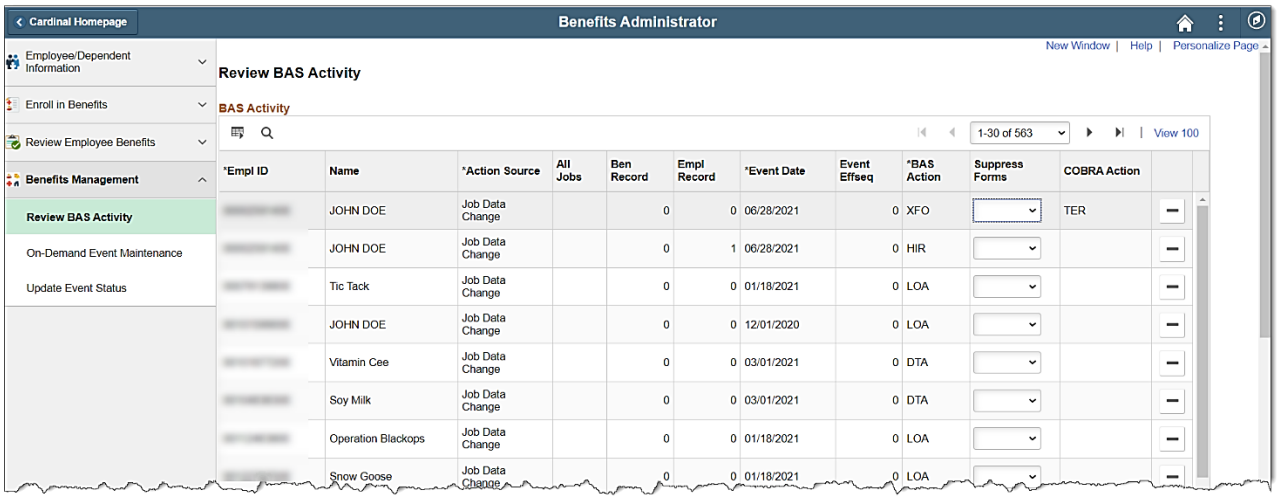
3. Click the **Benefits Management** list item on the left-hand side of the screen.

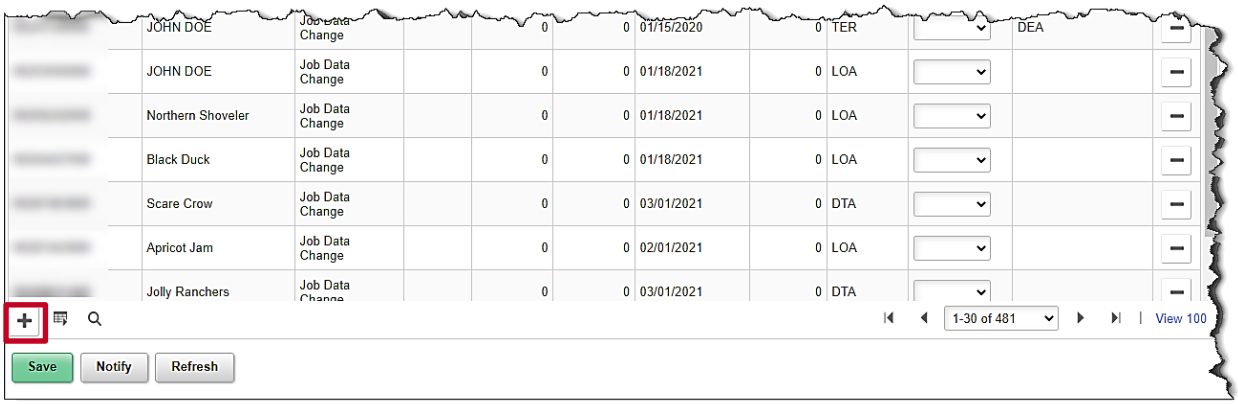
The **Benefit Management** tab displays.



4. Click the **Review BAS Activity** list item on the left-hand side of the screen.

The **Review BAS Activity** page displays.

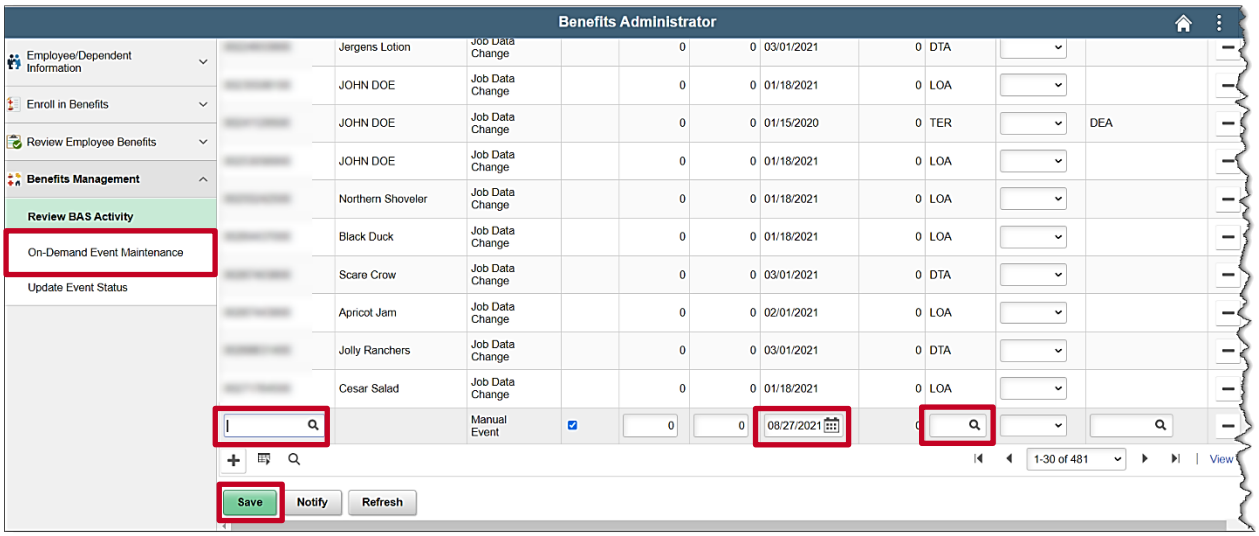




Note: This page contains two scroll bars. Make sure to scroll all the way down on both the page scroll bar and the table scroll bar before continuing.

5. Click the **+** button to add a row.

The **BAS Activity** page refreshes and displays a new row to input data.



6. Enter the **Empl ID**.

7. The Effective Date defaults to today's date. Enter the **Effective Date** for the Manual Event accordingly.

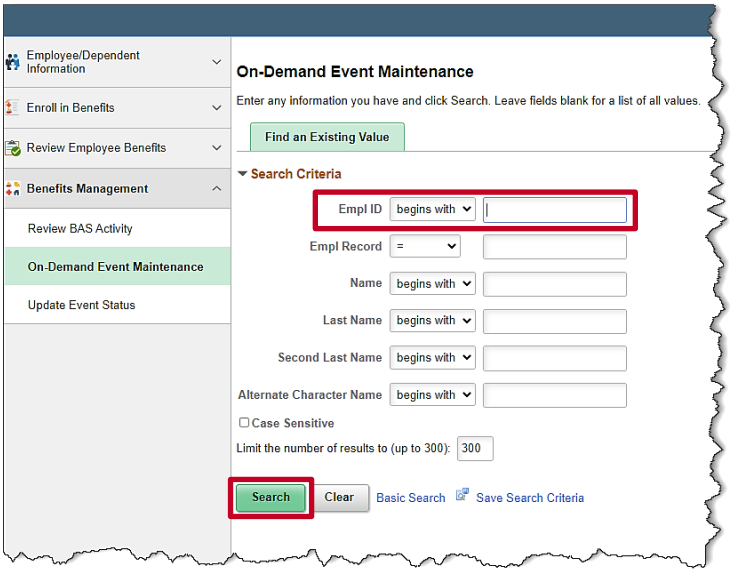
8. Enter the **BAS Action** for the Marriage Life Event. The magnifying glass can be used to search for the BAS Action if unknown.

   Note: If the manual life event for the employee involves a dependent loosing coverage (e.g., a DIV event), the BA has to also fill out the COBRA code associated to that manual event on the **BAS Activity** page.

9. Click **Save.**

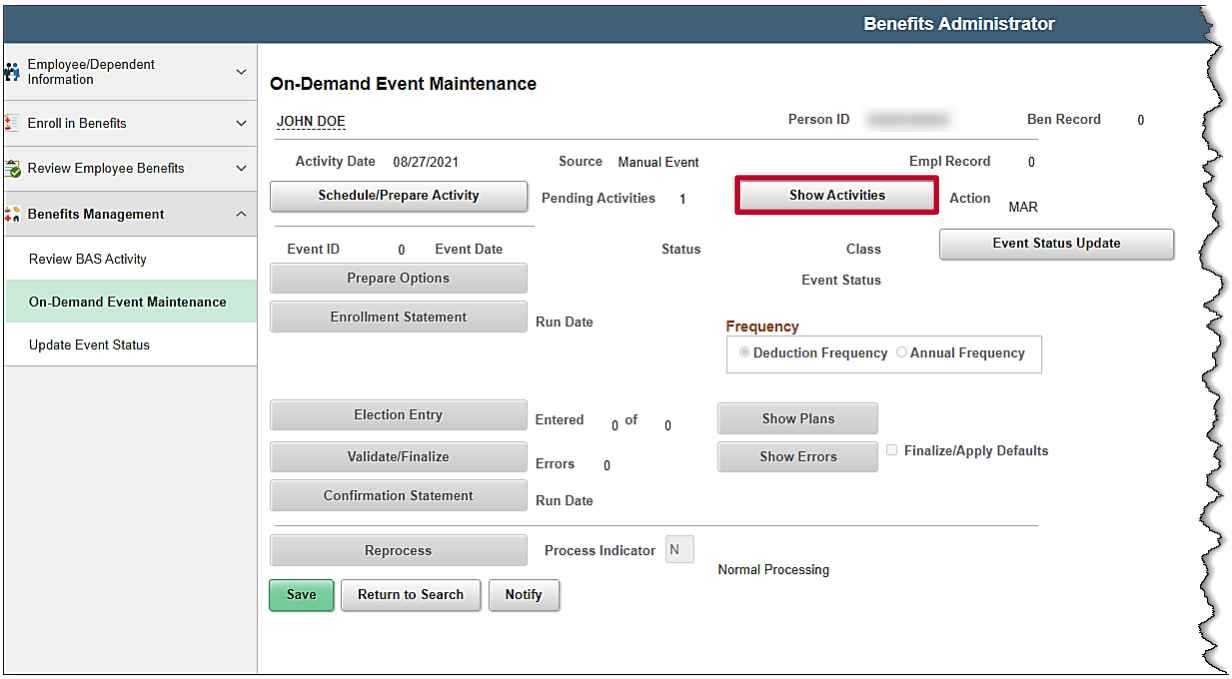
10. Click on the **On-Demand Event Maintenance** list item on the left-hand side of the screen.

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



11. Enter the **Empl ID** in the corresponding search box.
12. Click **Search**.

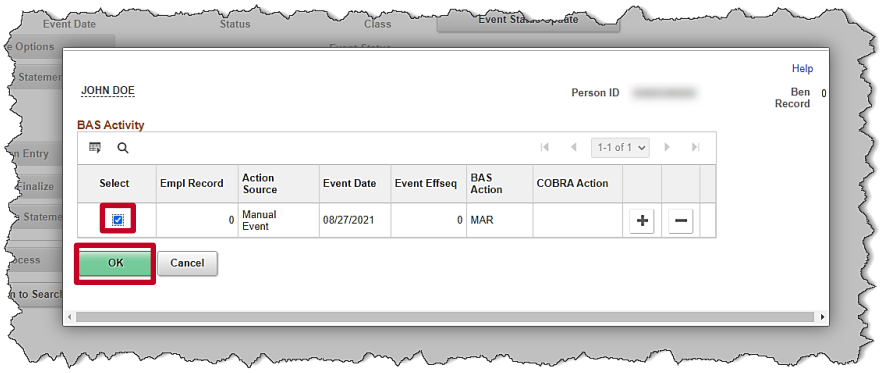
The **On-Demand Event Maintenance** page displays for the Employee.



Note: If there is a delay between creating the event on the Review BAS Activity page and navigating to the On-Demand Event Maintenance page, the Benefits Administration process may have run, which would schedule the activity for you. In this case, skip to Step 18.

13. Click on the **Show Activities**.

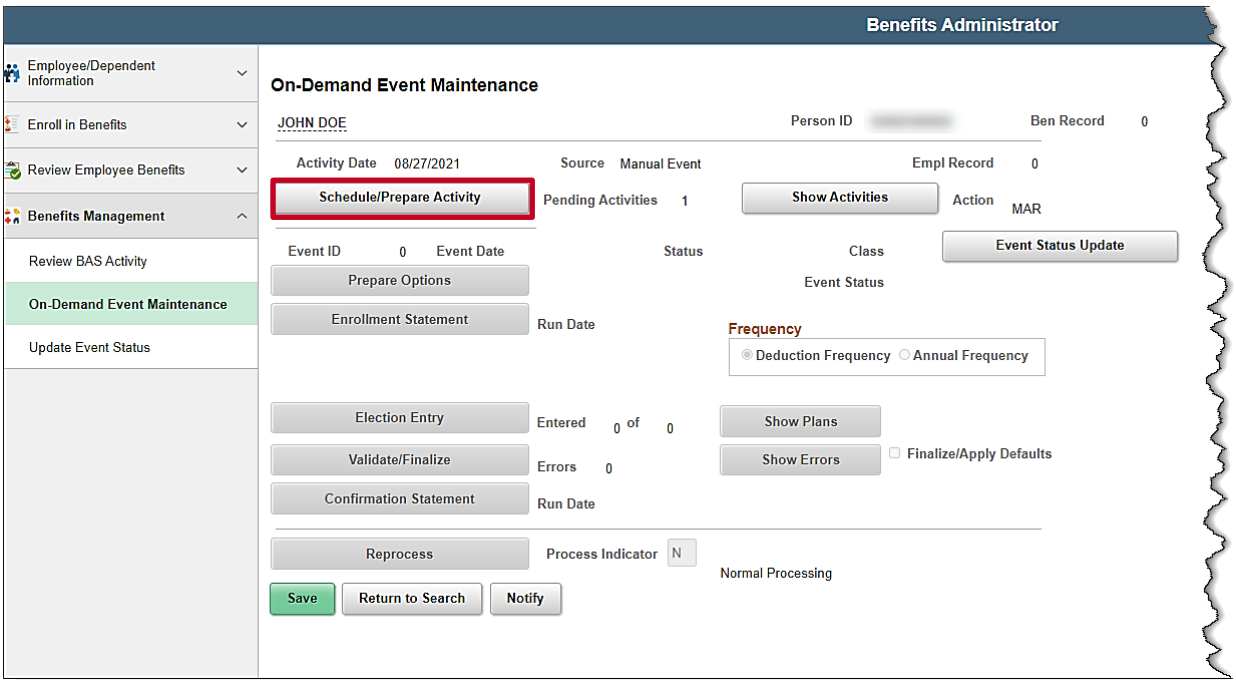
The **Bas Activity** table pop up displays.



14. Confirm that the manual event just added (MAR) has a check in the checkbox.

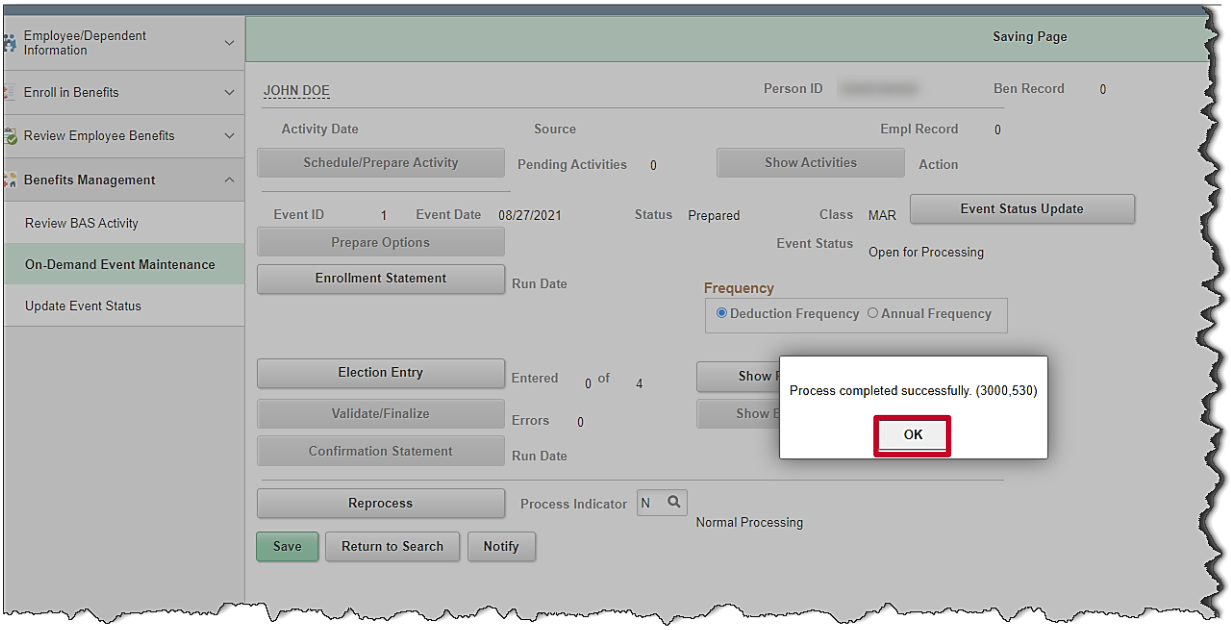
15. Click **OK.**

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



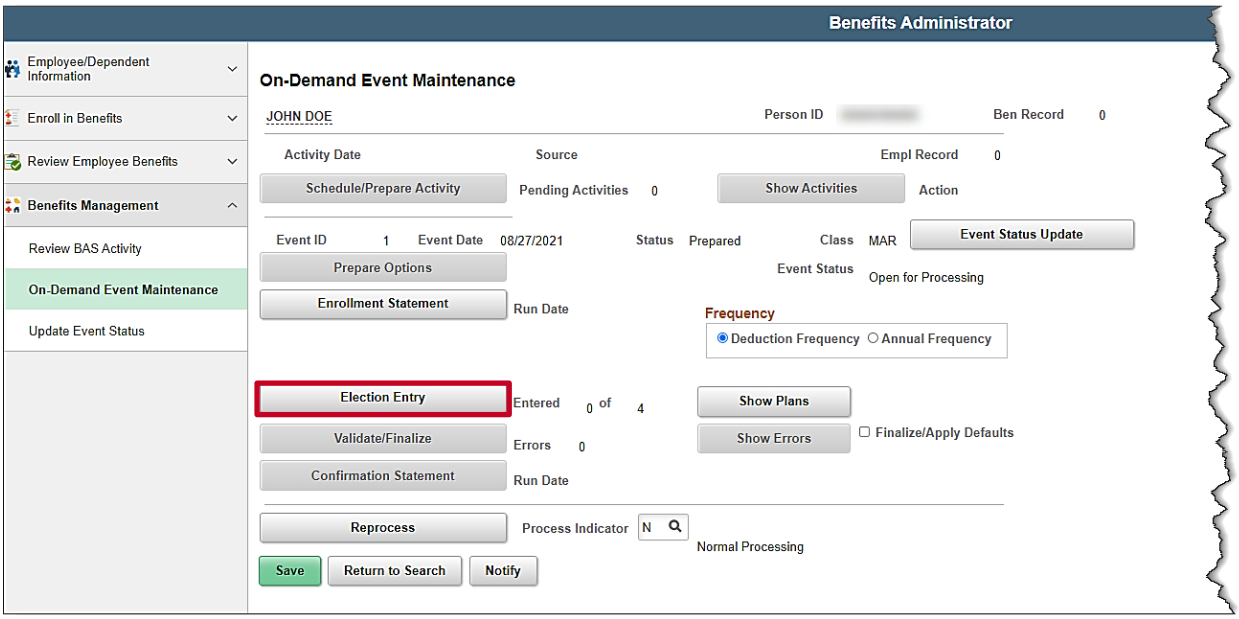
16. Click on the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity and opens election entry for this event.

The page refreshes with the following pop-up window.



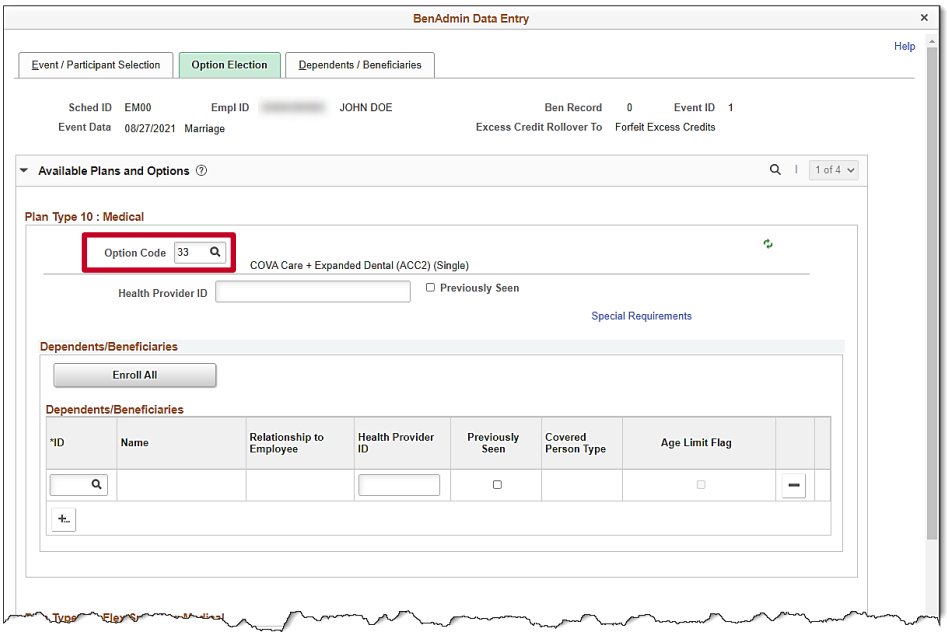
17. Click **OK**.

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



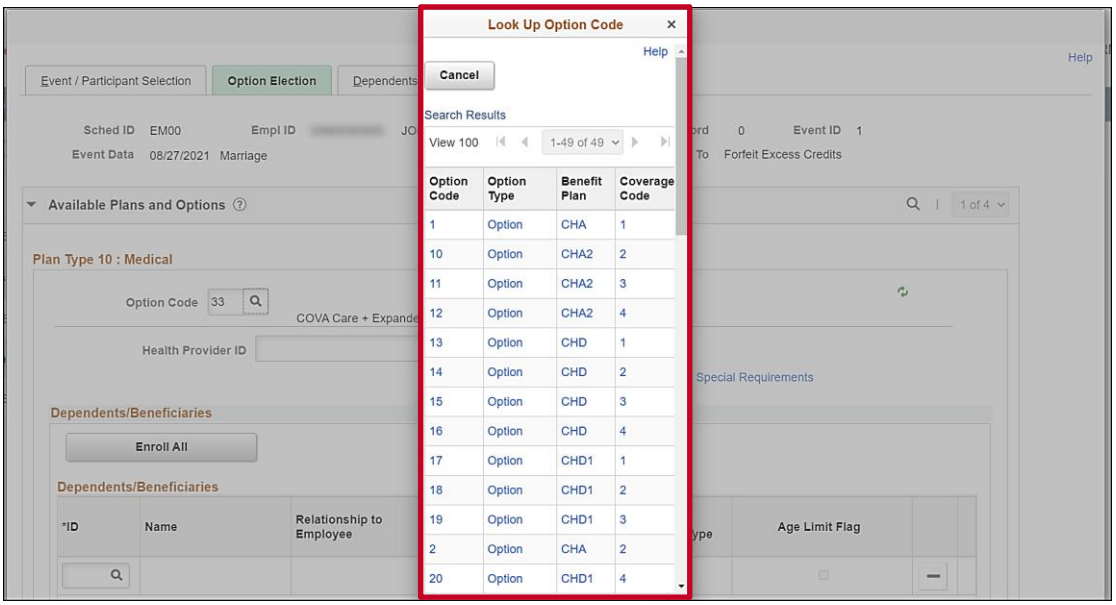
18. Click on the **Election Entry** button to open the benefit admin election pages.

The **Option Election** page will display.



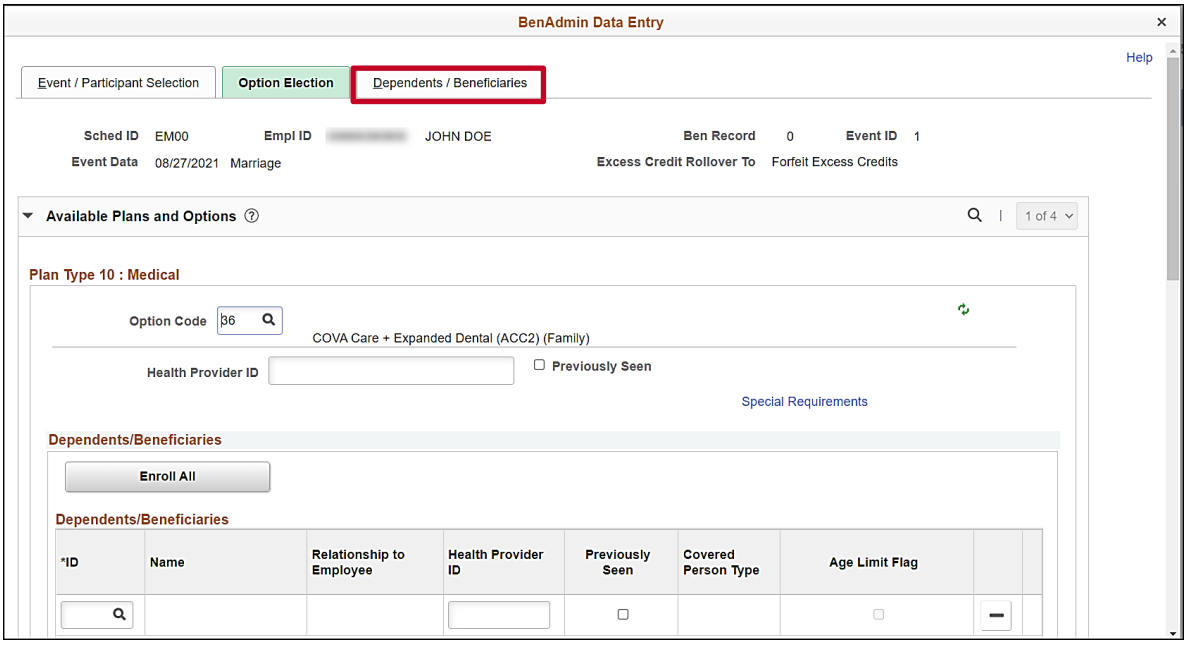
19. Click on the magnifying glass next to **Option Code** under the **Plan Type 10: Medical** section.

The **Option Code** options display for the Plan Type 10: Medical.



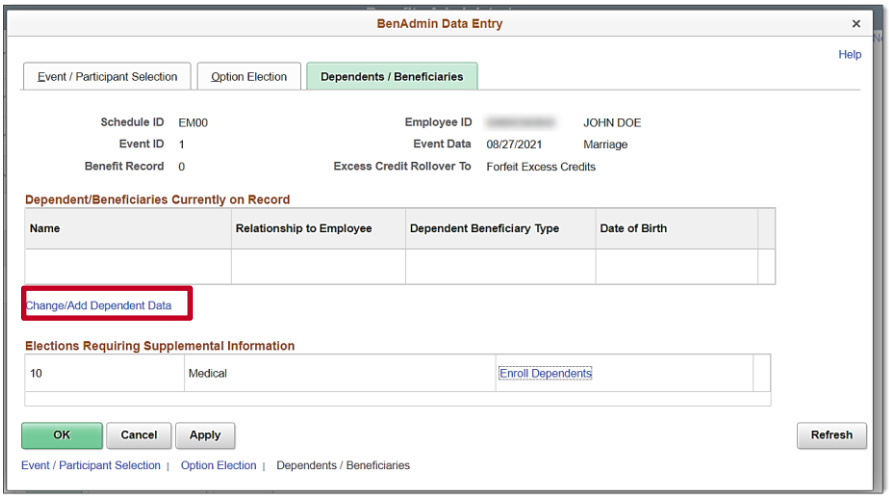
20. Select the same type of plan the employee currently has but with a **Coverage Code 4** (Family coverage).

The **Election Entry** page returns.



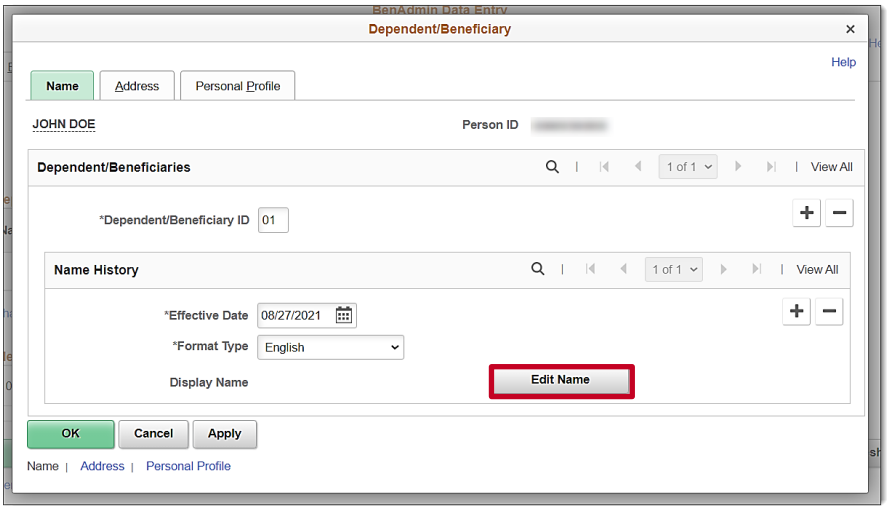
21. Click on the **Dependents/Beneficiaries** tab.

The **Dependent/Beneficiary** tab displays.



22. Click on the **Change/Add Dependent Data** hyperlink to add the dependent to the employee record.

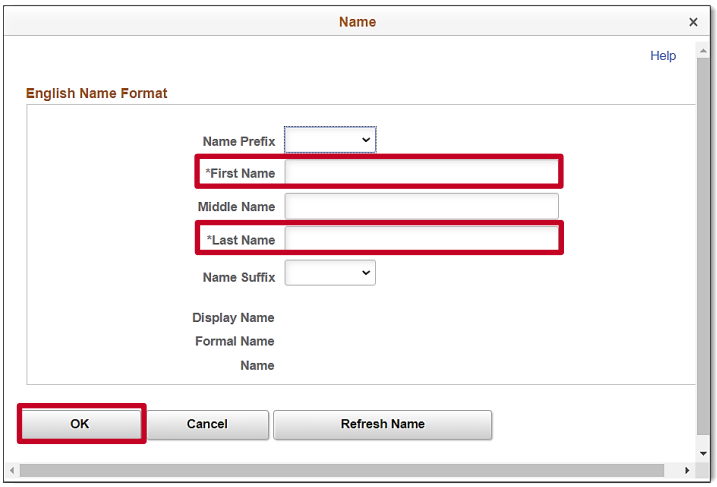
The **Dependent Data** page pop up displays.



Note: Confirm that the effective date of the Dependent/Beneficiary is on or before the Event Date. Otherwise, the dependent will not display when they employee is trying to select the dependent for coverage on the Option Election page.

23. Click on **Edit Name**.

The **Name** page pop-up displays.

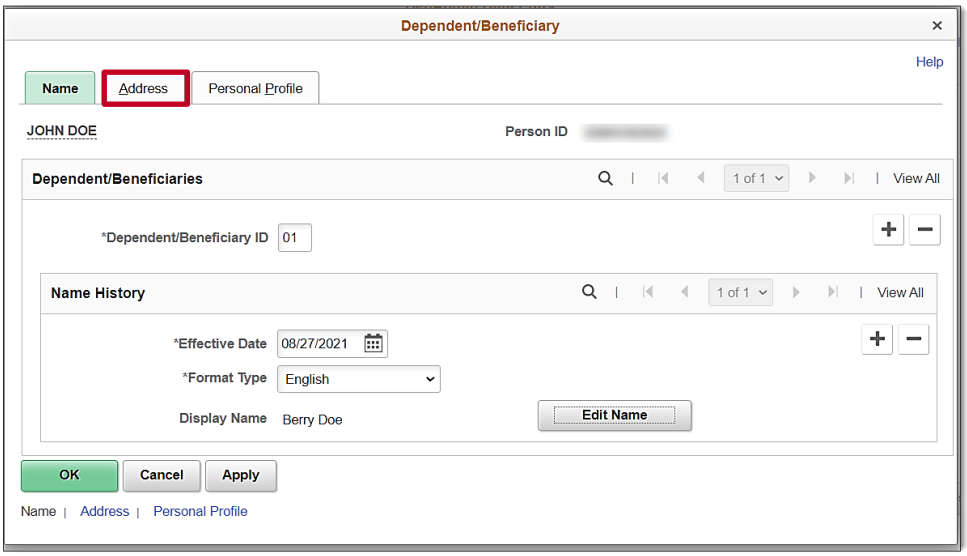


24. Enter the **First Name** and **Last Name**. The other fields are optional.

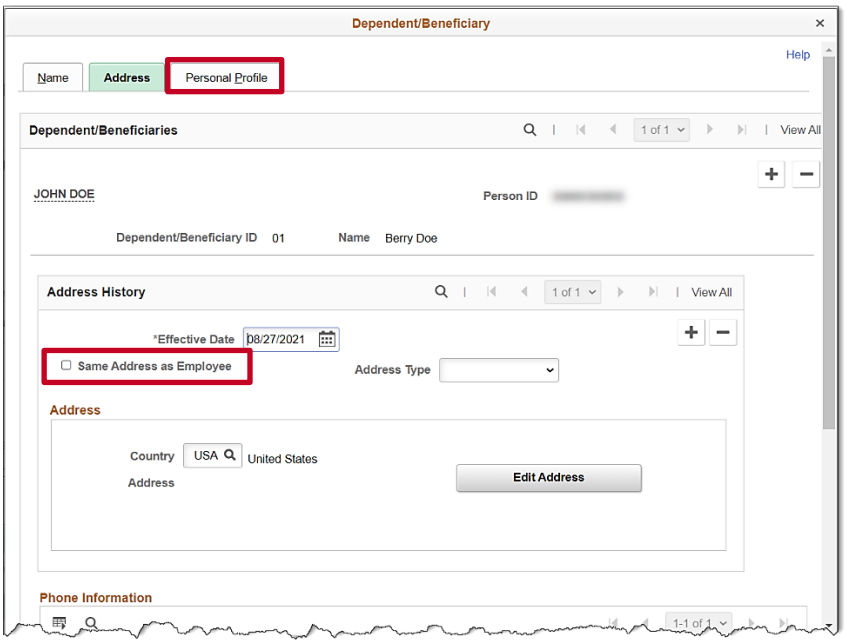
25. Click **OK.**

Note: The dependent's name will now show next to the **Display Name** field.

The **Dependent Information** page returns.



The **Address** page displays.

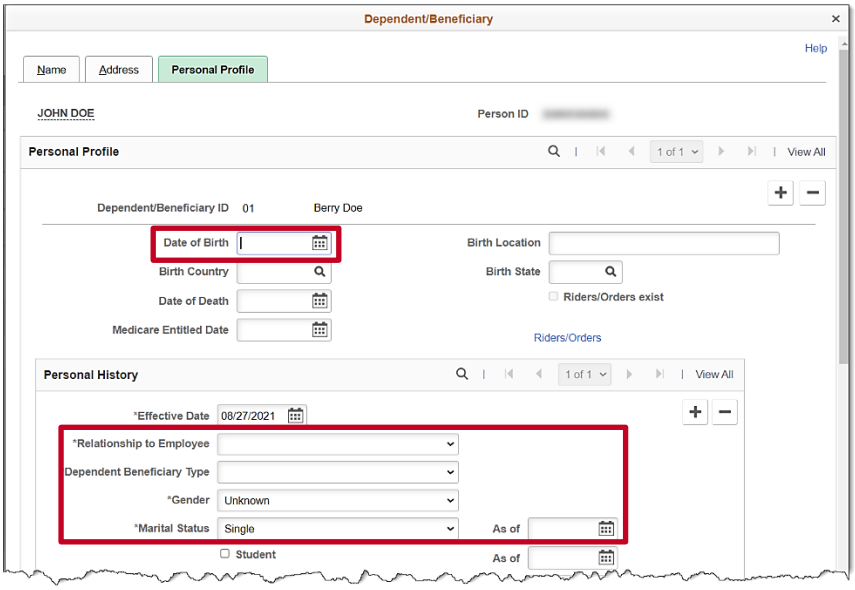


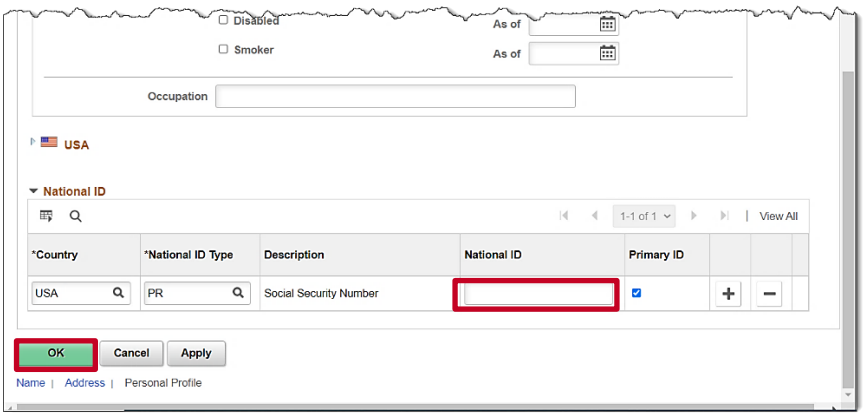
26. Check the box next to **Same Address as Employee**.

    Note: If the Agency BA receives a **Phone Number** and/or **Email Address** for the dependent, this is the page used to enter that information. For this example, there is no information for Phone or Email. These fields are not required.

27. Click on **Personal Profile** tab.

The **Personal Profile** page displays.





28. Enter the **Date of Birth** for the dependent.

29. Click the **Relationship to Employee** dropdown and select **Spouse.**

30. Select **Approved Dependent** from the drop down next to **Dependent Beneficiary Type.**

31. Select the **Gender** from the drop-down menu.

32. Change the **Marital Status** to **Married**. The **As of** date will automatically be set to the effective date of the event. Agency BAs can update this field as needed.

    Note: If any additional information was provided by the employee for the dependent, enter it on this page. The Student and Smoker checkboxes are not used on this page.

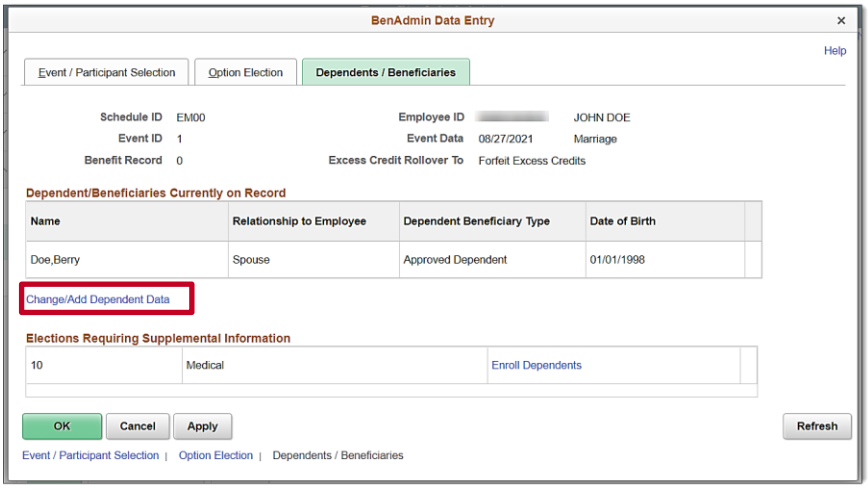
    Note: As a reminder, if the employee's Marital Status is affected by the Manual Life Event, the Agency BA will need to contact the Agency HR Admin to complete the personal data update accordingly.

33. Enter the **National ID** for the dependent.

    Note: If the employee has not provided a dependent's SSN, the Agency BA should leave the field blank. However, when the SSN becomes available, the employee or Agency BA should enter it as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. As they do today, agencies should make at least three attempts at obtaining the dependents SSN. Agencies can use the **Base Benefits Consistency Audit** to monitor dependents missing an SSN.

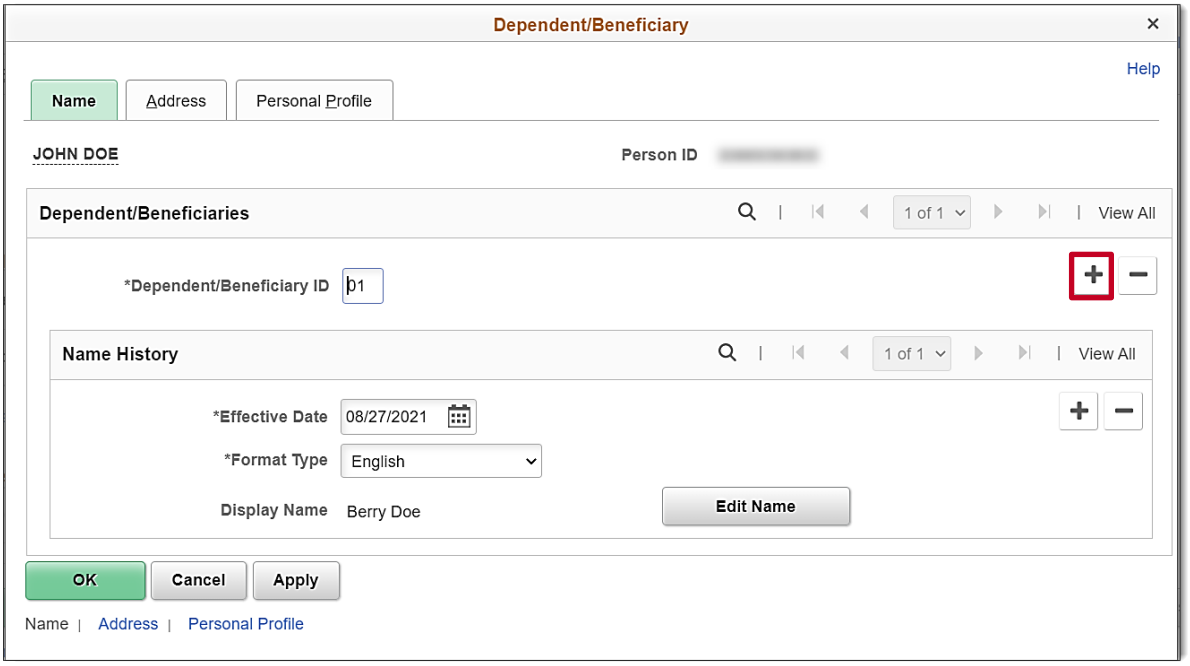
34. Click **OK**.

The **BenAdmin Data Entry** page displays.



35. Click the **Change/Dependent Data** hyperlink to add another dependent. For this example, the employee's marriage also included a stepchild that has to be added as an additional dependent.

The **Dependent Information** page displays.

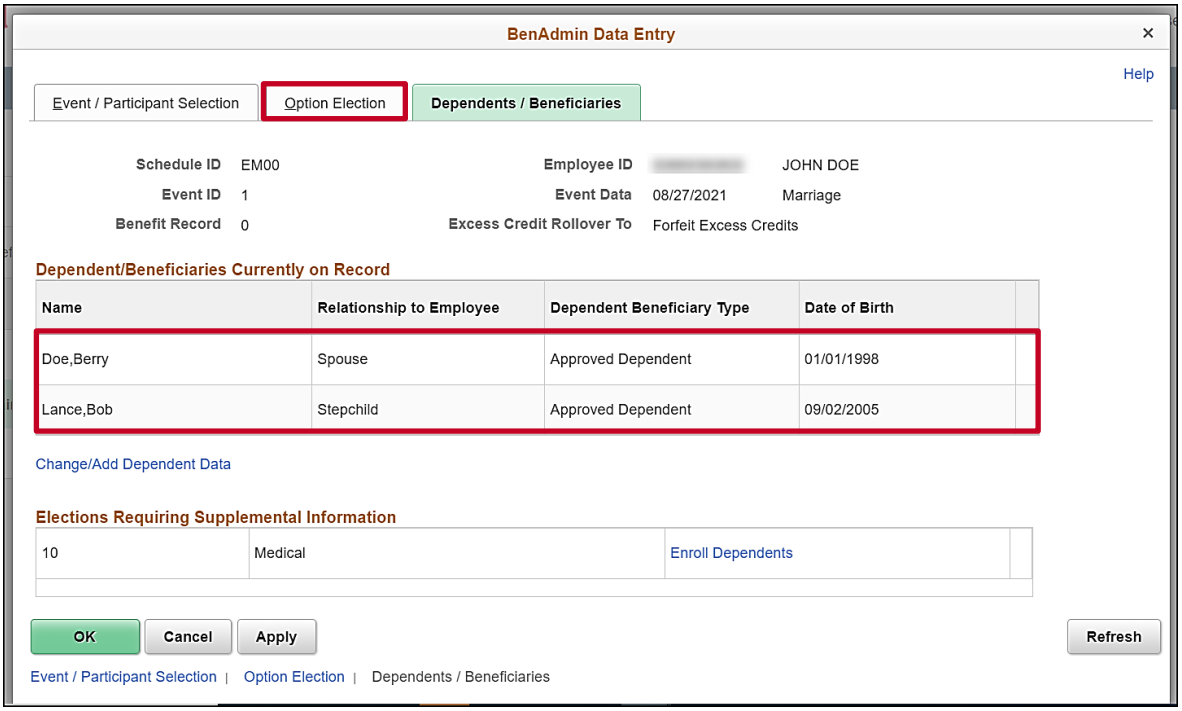


36. Click on the "**+**" button to add an additional dependent.

37. Repeat steps 20 – 32.

    Note: Make sure to select **Stepchild**, if appropriate, for **Relationship to Employee** field on the **Personal Profile** tab.

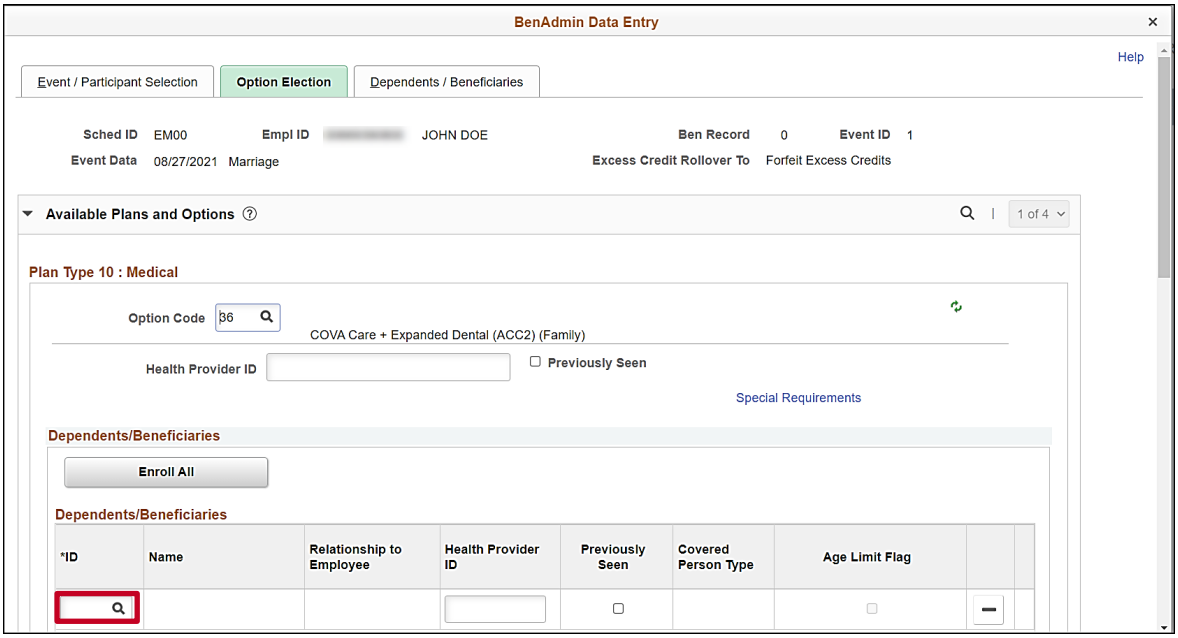
The **BenAdmin Data Entry** page displays.



38. Confirm that both dependents display under the **Dependent/Beneficiaries Currently on Record** section.

39. Click on the **Option Election** tab.

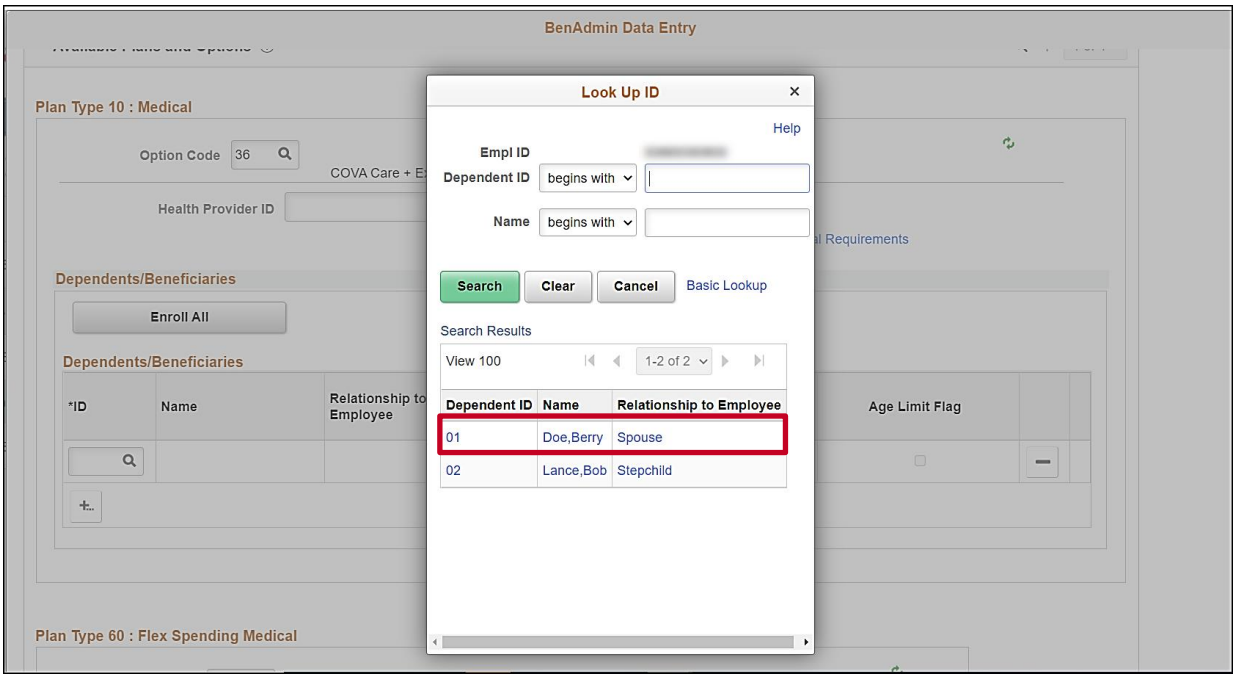
The **Option Election** page displays.



40. Click on the magnifying glass under ***ID** field.

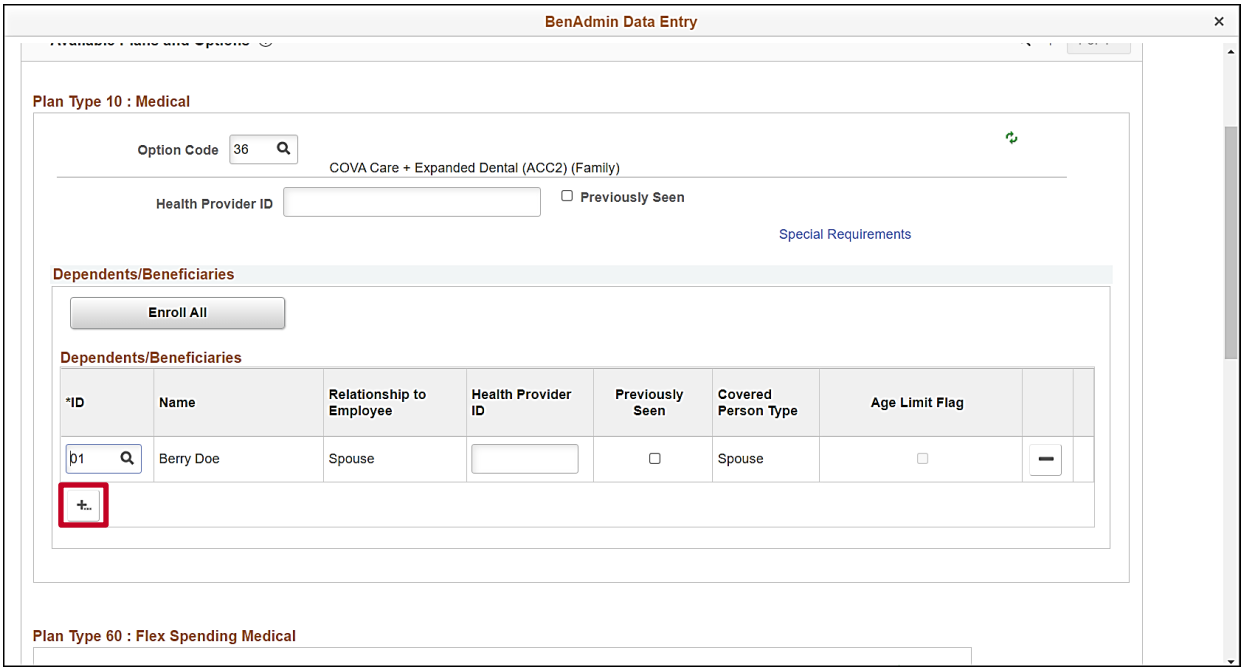
    Note: To add dependents to **Plan Type 10: Medical** Family coverage you can either click on **Enroll All** or add them one by one individually. For this scenario, we will show how to add them one by one.

The **Look Up ID** page pop up displays.



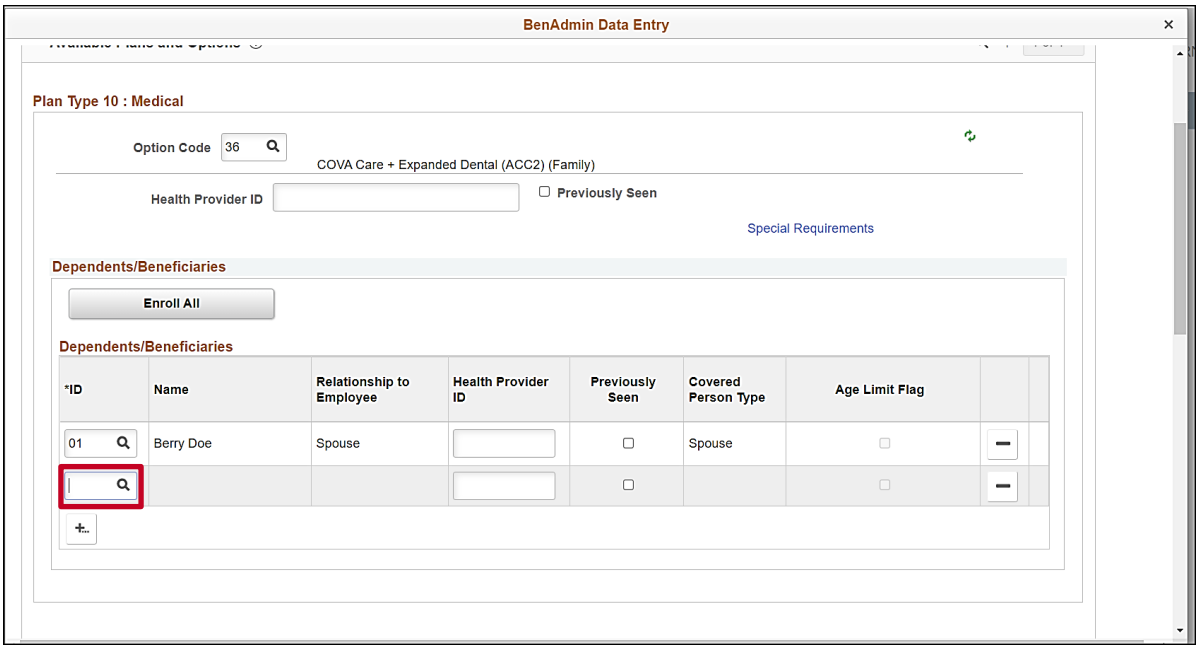
41. Click on the dependent you want to enroll in the medical plan benefits. In this example it would be the **Spouse.**

The **Option Election** page returns.



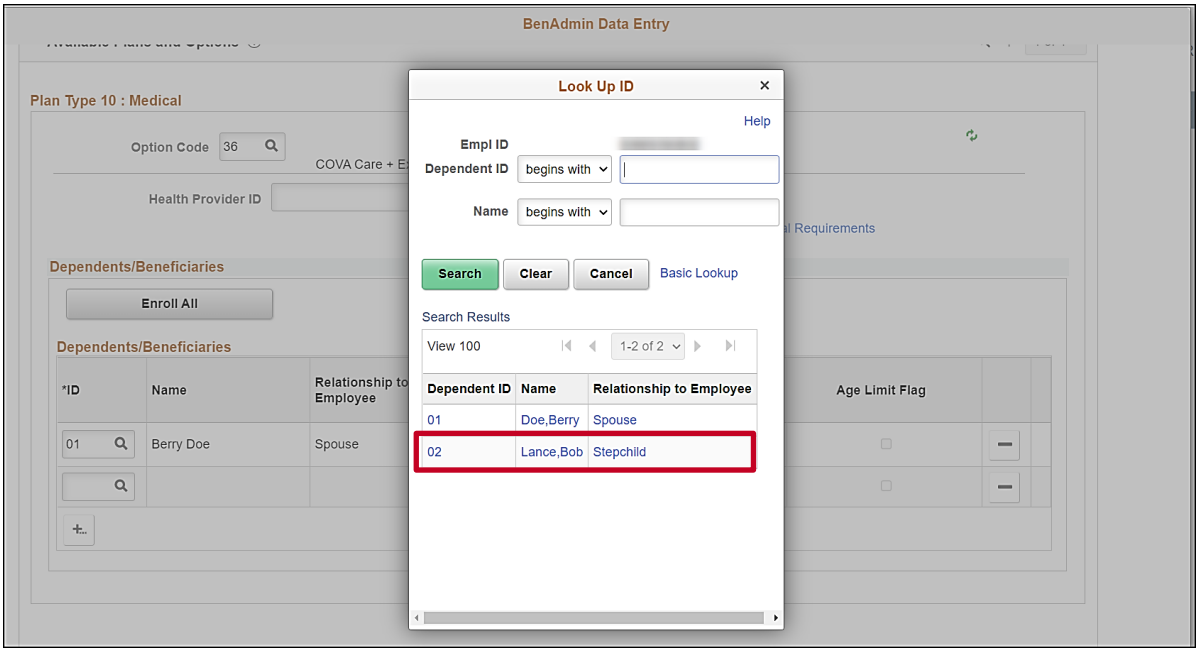
42. Click on the "**+**" button under ***ID 01.**

The **Option Election** page refreshes with an additional row under **Dependents/Beneficiary** section.



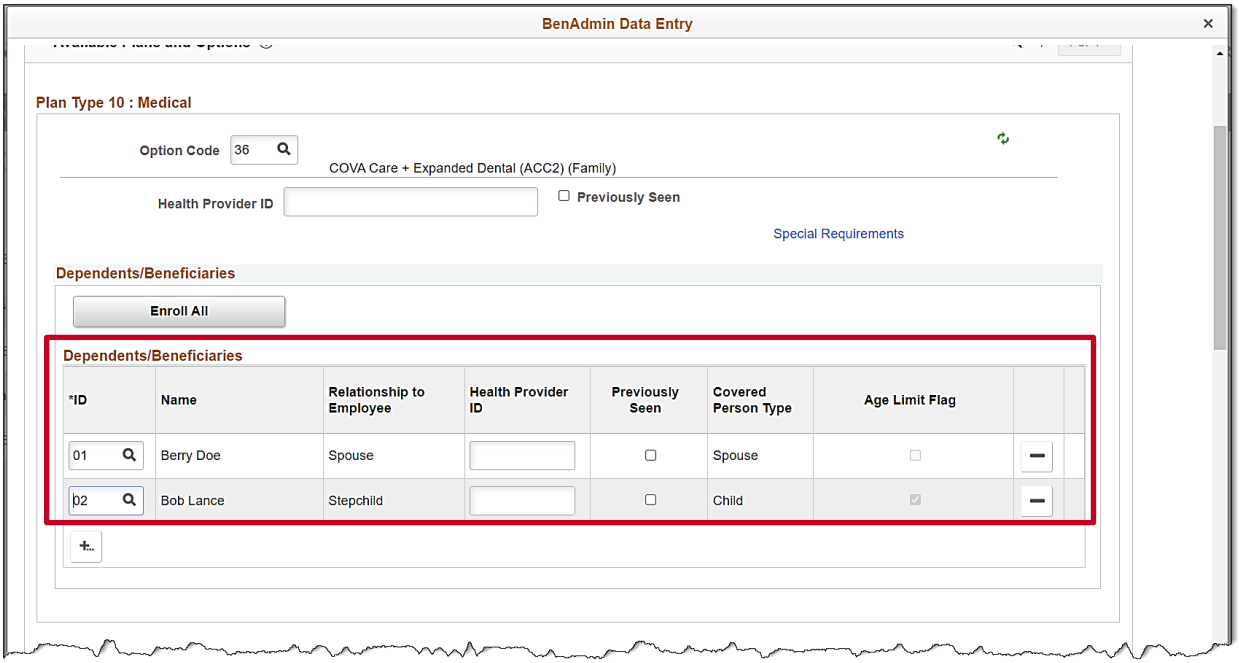
43. Click on the magnifying glass under the listed dependent.

The **Look Up ID** page pop up displays.



44. Click on the second dependent listed. In this example it would be the **Stepchild.**

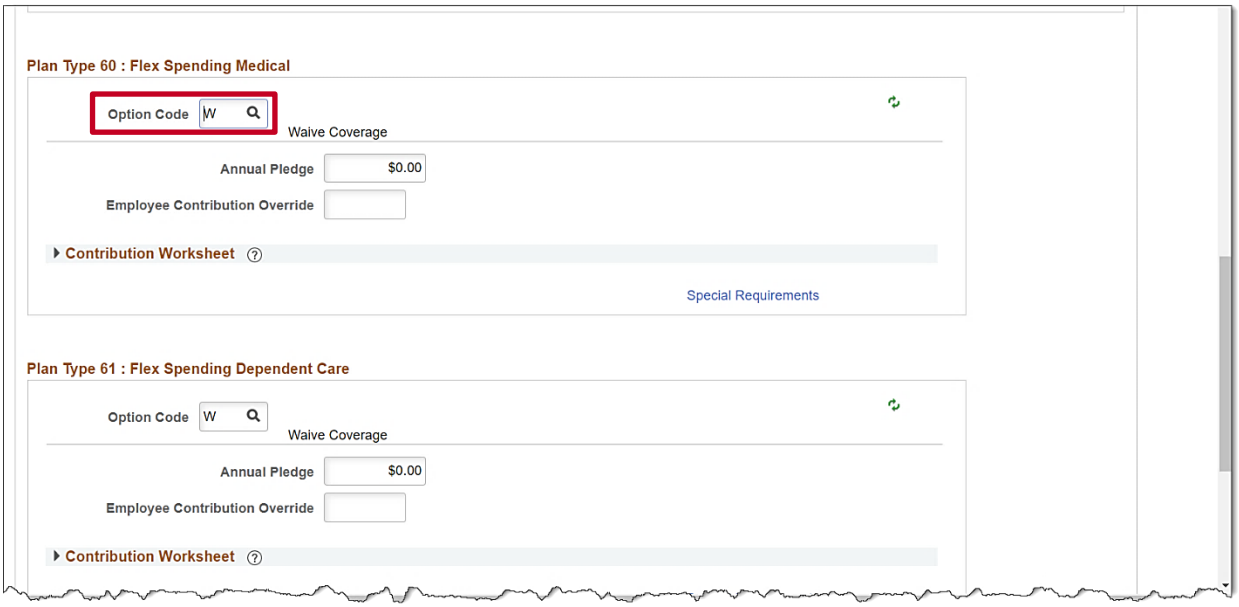
The **Option Election** page returns.



45. Confirm that all dependents that should be enrolled in the medical plan coverage for the employee are listed under the **Dependent/Beneficiaries** section.

46. Scroll down to **Plan Type 60: Flexible Spending Medical**.

The **Plan Type 60: Flex Spending Medical** section displays.

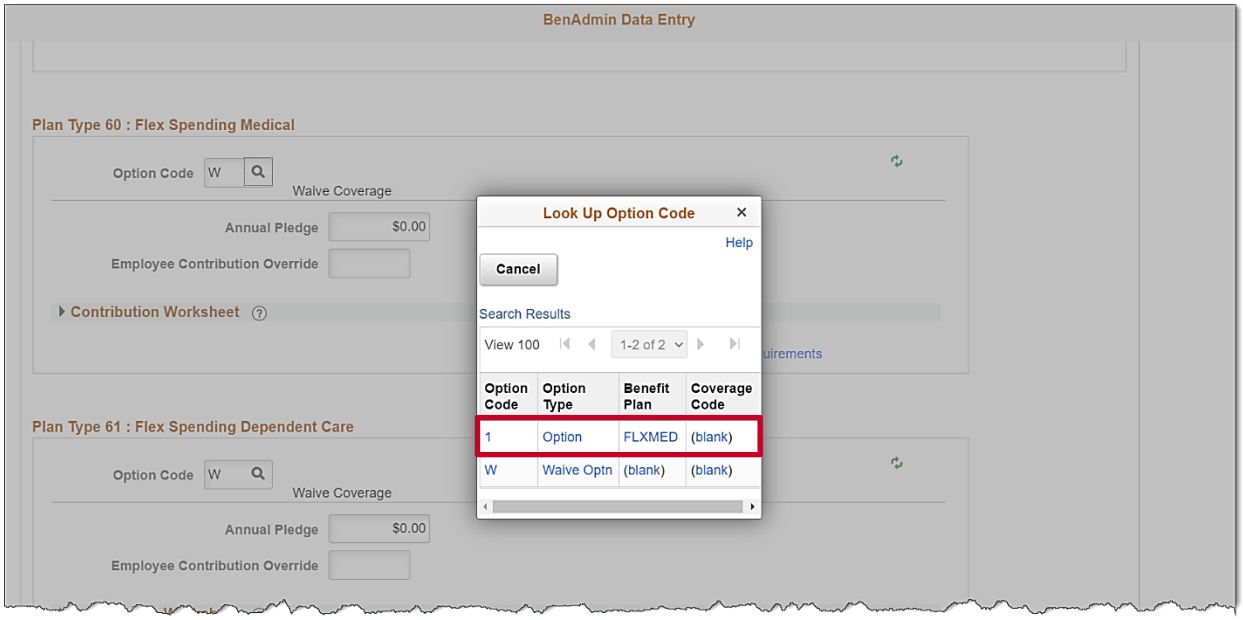


Note: The Plan Types available on the **Option Election** tab are determined by the employee's benefit eligibility. Cardinal has embedded configurations based on the Commonwealth's program rules.

47. Click on the magnifying glass under Plant Type 60: Flex Spending Medical **Option Code.**

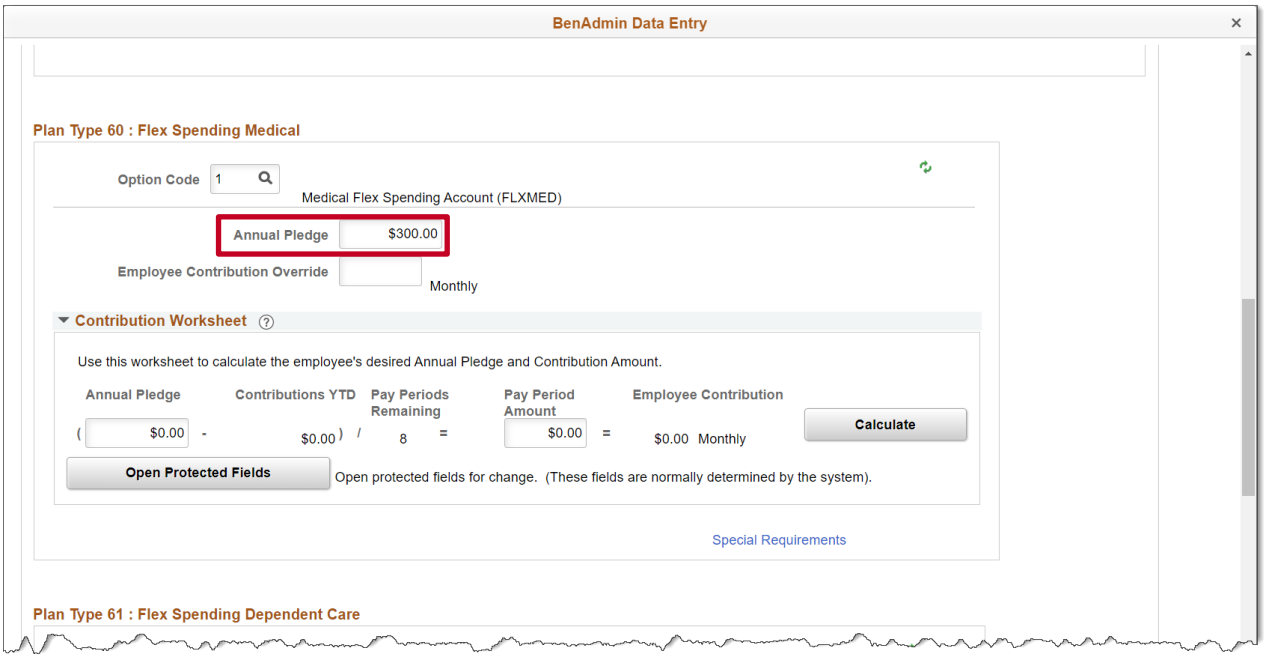
    Note: If a plan type is left blank, the system will automatically waive that coverage.

The **Look Up Option Code** pop up displays.



48. Click on **Option 1.**

The **Election Entry** page returns.

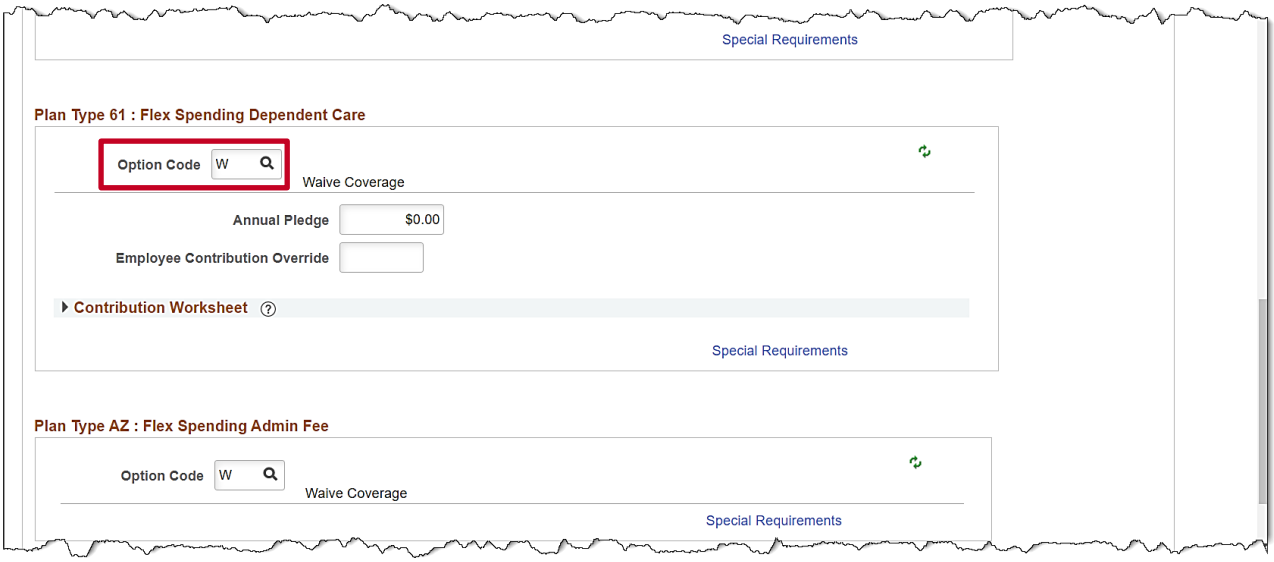


49. Input the amount (specified by the employee) for **Annual Pledge** for Flex Spending Medical. For this example, we will elect $300 for the Annual Pledge.

    Note: The Benefit Administrator can input the Pay Period Amount in the Contribution Worksheet and click on **Calculate** to determine what the annual pledge would be. Once determined, the BA must enter the **Annual Pledge** amount above under Option Code.

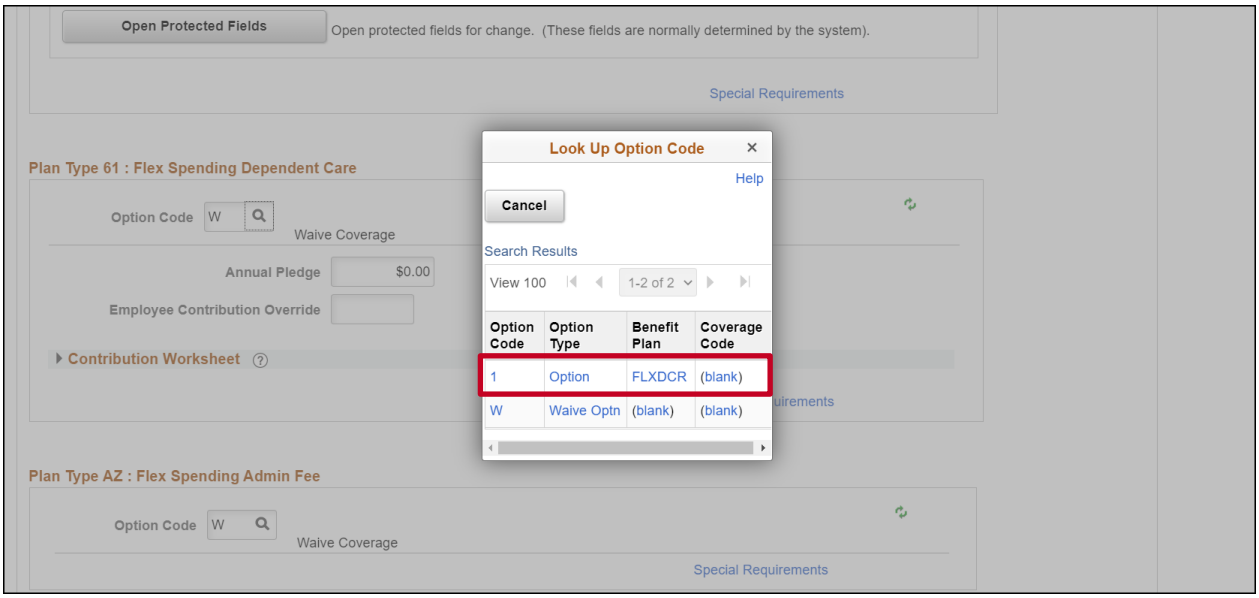
50. Scroll down to **Plan Type 61: Flex Spending Dependent Care.**

The **Plan Type 61: Flex Spending Dependent Care** section displays.



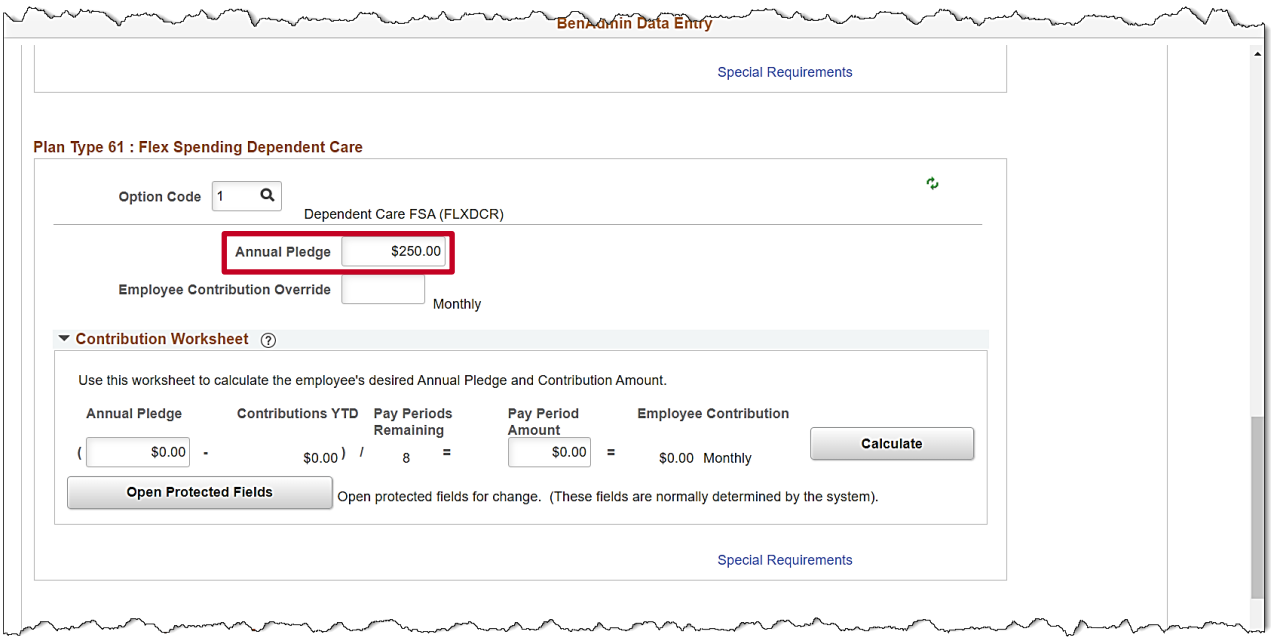
51. Click on the magnifying glass under Plan Type 61: Flex Spending Dependent Care **Option Code**. For this scenario the employee has elected Flex Spending Dependent Care.

The **Look Up Option Code** pop up displays.



52. Click on **Option 1.**

The **Election Entry** page returns.



53. Input the amount (specified by the employee) for **Annual Pledge** for Flex Spending Dependent Care. For this example, we will elect $250 for the Annual Pledge Scroll down to **Plan Type 61: Flex Spending Dependent Care.**

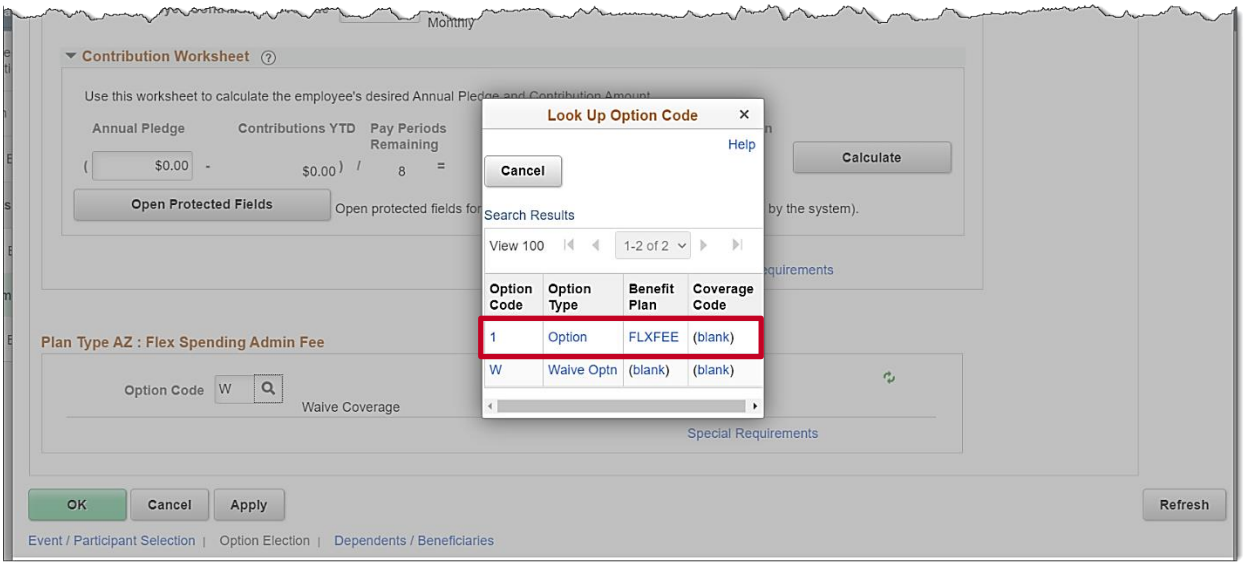
54. Scroll down to **Plan Type AZ: Flex Spending Admin Fee.**

The **Plan Type AX: Flex Spending Admin Fee** section displays.

55. Click on the magnifying glass under Plan Type AZ: Flex Spending Admin Fee **Option Code.**

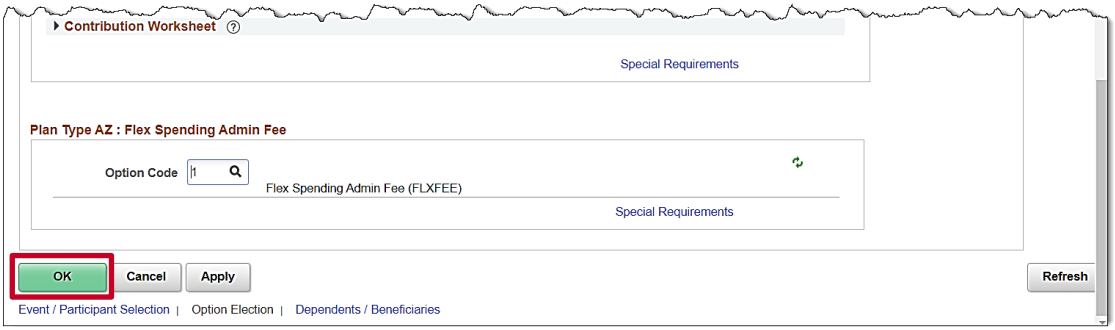
Note: If the employee has elected a Flex Spending Medical amount, the Flex Spending Admin Fee must be elected as well. If the BA forgets to elect the Fee, the system will give them an error.

The **Look Up Option Code** pop up displays.



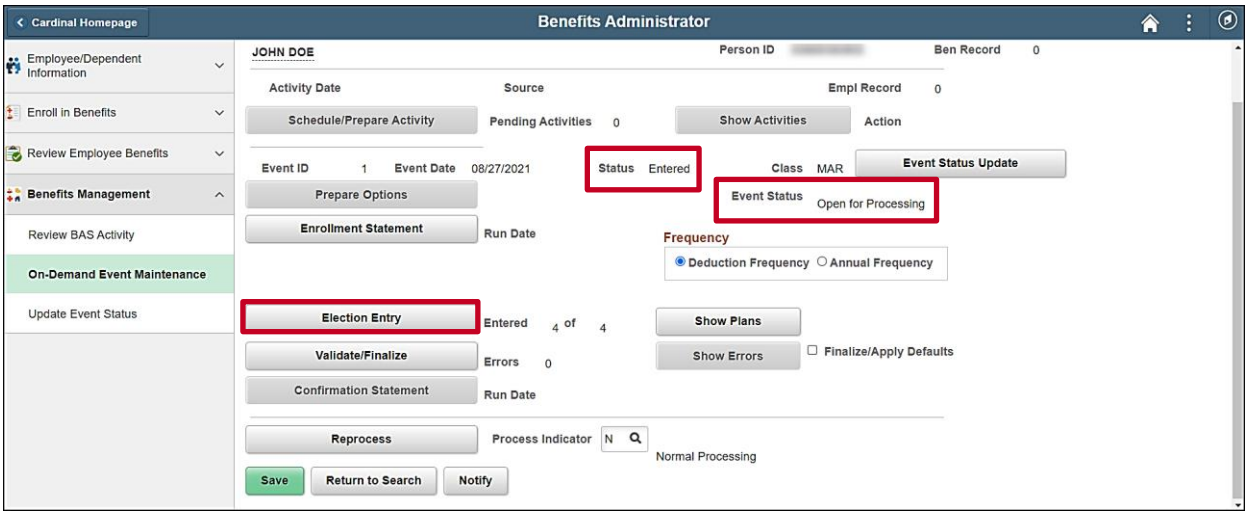
56. Click on **Option 1.**

The **Election Entry** page returns.



57. Click **OK.**

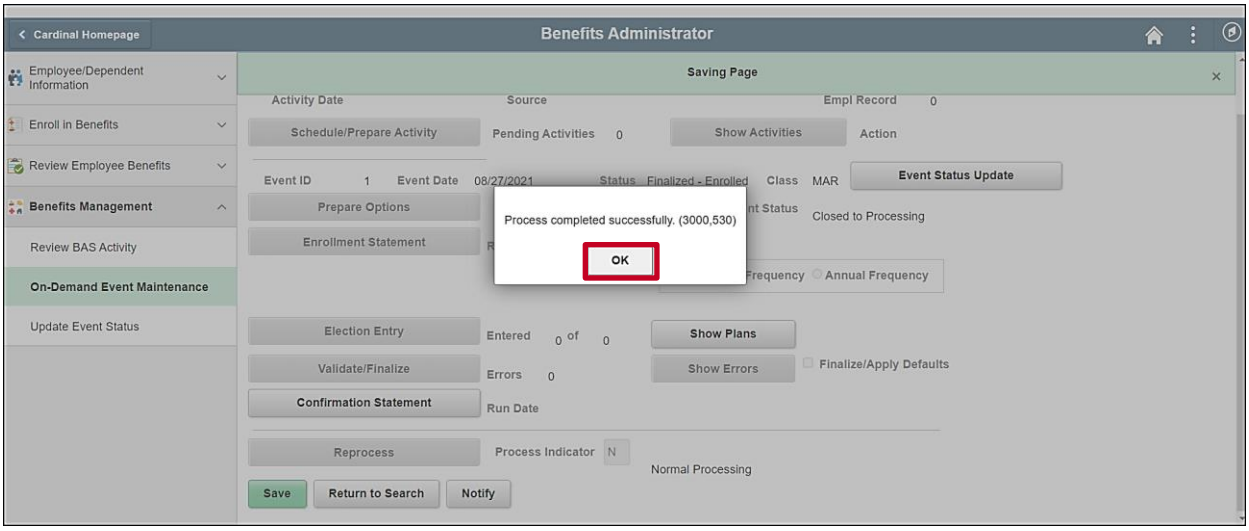
The **On-Demand Event Maintenance** page returns.



58. Confirm the **Status** is **Entered,** and the **Event Status** is **Open for Processing.**

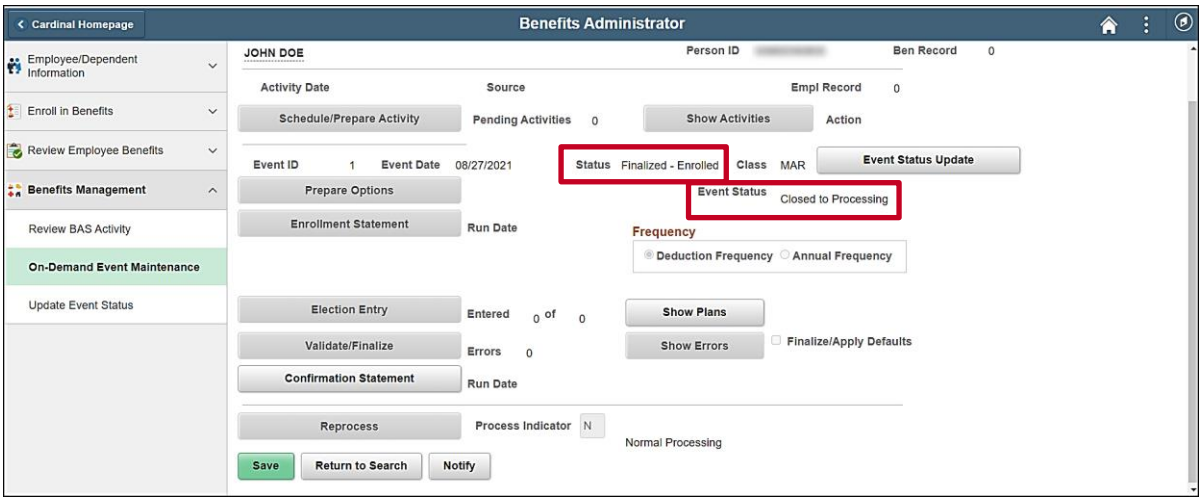
59. Click on **Validate/Finalize** button to execute the programming process to validate elections, close the event, and update the Base Benefits Tables.

The page refreshes with the following pop-up window.



60. Click **OK.**

The **On-Demand Event Maintenance** page refreshes and returns.



61. Confirm the **Status** is **Finalized – Enrolled** and the **Event Status** is **Closed to Processing.**