

Completing a New Hire Enrollment Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to complete a new hire enrollment on behalf of the employee. This process is performed on the **On-Demand Event Maintenance** page after the employee submits their Benefits Enrollment form to the BA with all the information necessary to complete the process.

Hire (HIR and HR2) Benefit Events are triggered after the HR new hire transactions are completed by an Agency HR Administrator.

The HR2 Benefit Event will automatically enroll the eligible employee in the Imputed Life Insurance Income Plan after the Benefits Administration process runs and then the HR2 Benefit Event will automatically close. The Benefits Administration process runs periodically on a schedule. This must be completed prior to completing the employee's other enrollments via the HIR Benefit Event. If the Agency BA needs to process the HIR Benefit Event before the Benefits Administration process has run, the HR2 Benefit Event can be manually closed. This Job Aid contains the steps used to manually close the HR2 Benefit Event.

Navigation Note: Please note that there may be 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.

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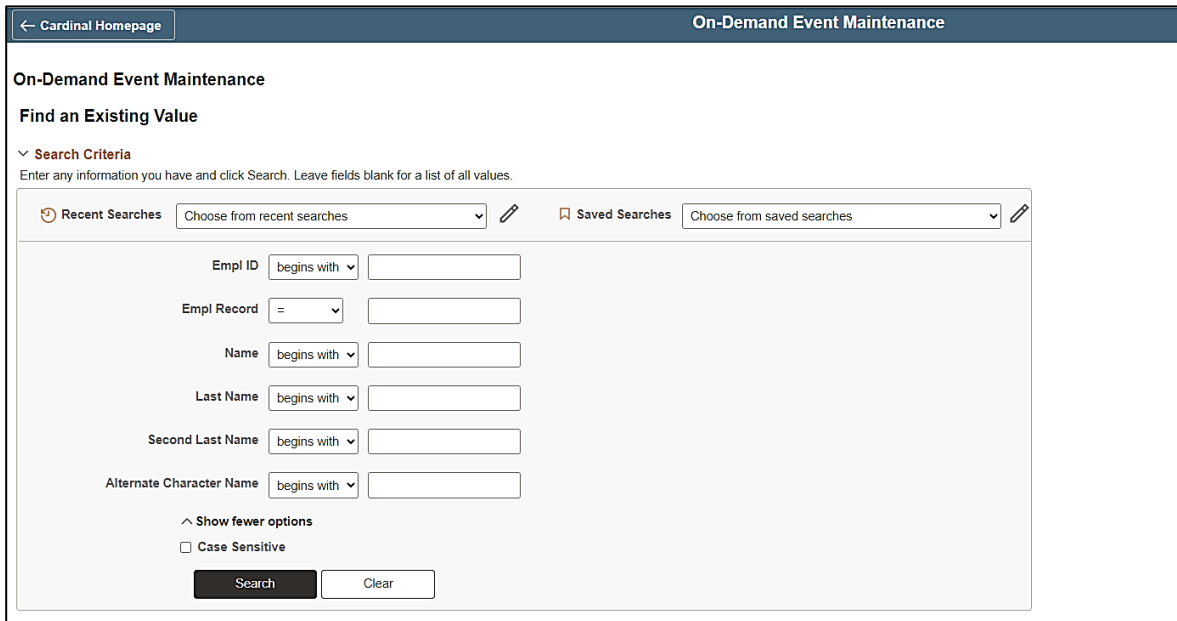
Revision History

| Revision Date | Summary of Changes |
|---------------|--|
| 3/1/2025 | Updated the screenshots of the Search pages (Section 1 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid. |

Completing a New Hire Benefit Enrollment

| Step | Action |
|------|--|
| 1. | Navigate to the On-Demand Event Maintenance page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance |

The **On-Demand Event Maintenance Find an Existing Value** page displays.



← Cardinal Homepage On-Demand Event Maintenance

On-Demand Event Maintenance

Find an Existing Value

▼ **Search Criteria**
Enter any information you have and click Search. Leave fields blank for a list of all values.

Recent Searches Saved Searches

Empl ID

Empl Record





Name

Last Name

Second Last Name

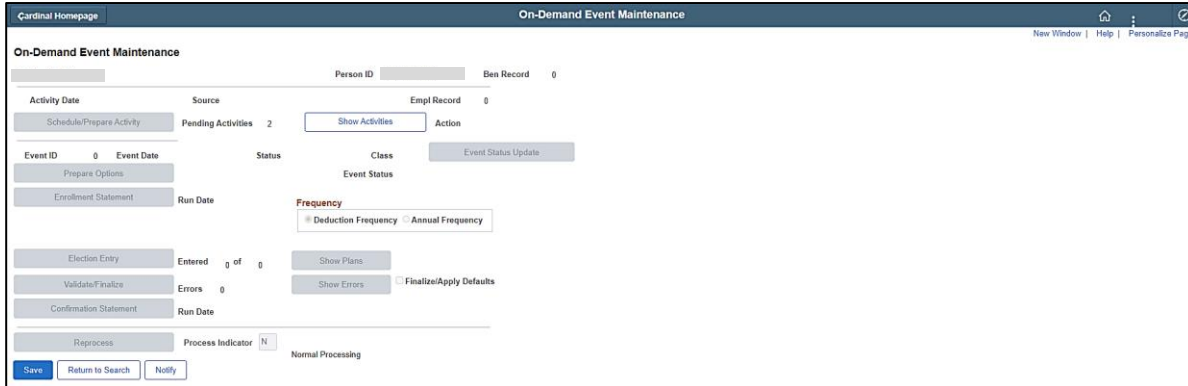
Alternate Character Name

^ Show fewer options
 Case Sensitive

| | |
|---|---|
|  | For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning . |
| 2. | Enter the employee's Employee ID in the Empl ID field.  |
|  | 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.  |

| Step | Action |
|------|--------|
|------|--------|

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

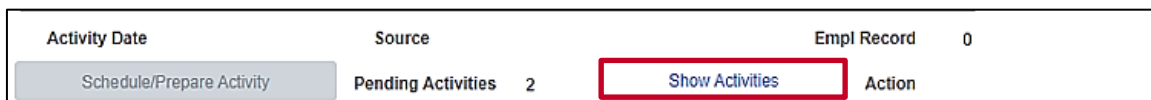


4. Review the **Pending Activities** field and proceed based on the following:

- If the **Pending Activities** field displays a “2”, the Benefits Administration process has not run and the HR2 Benefit Event has not been automatically processed and closed. Proceed with Step 5
- If the **Pending Activities** field displays a “1”, the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed but the “HIR” Benefit Event has not been prepared. Proceed with Step 10
- If the **Pending Activities** field displays a “0”, the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed. Additionally, the “HIR” Benefit Event has been prepared. Proceed with Step 12

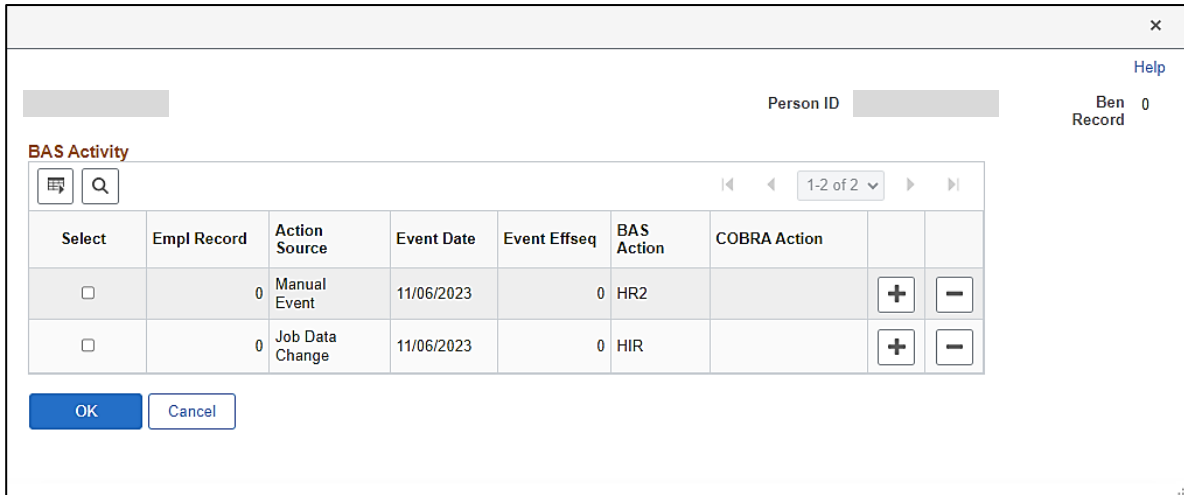


5. Click the **Show Activities** button.



| Step | Action |
|------|--------|
|------|--------|

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



| Select | Empl Record | Action Source | Event Date | Event Effseq | BAS Action | COBRA Action |
|--------------------------|-------------|-----------------|------------|--------------|------------|--------------|
| <input type="checkbox"/> | 0 | Manual Event | 11/06/2023 | 0 | HR2 | |
| <input type="checkbox"/> | 0 | Job Data Change | 11/06/2023 | 0 | HIR | |

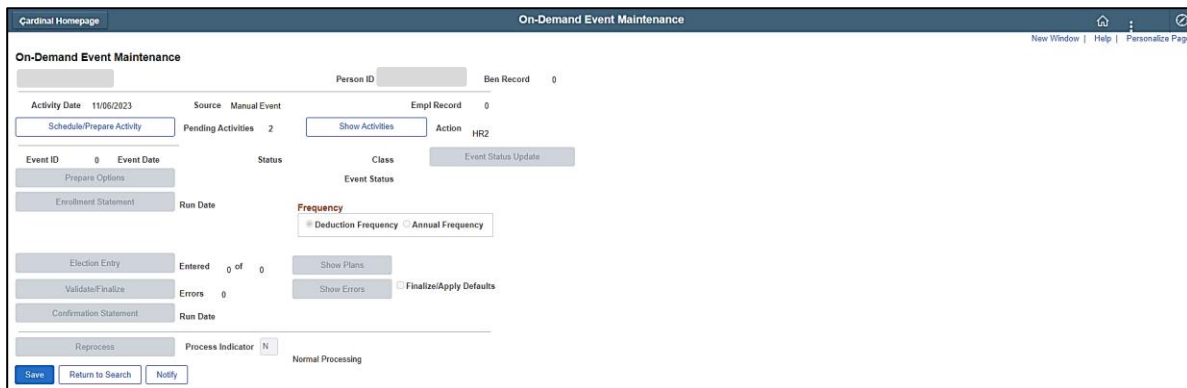
6. Click the **Select** checkbox option for the HR2 Benefit Event.




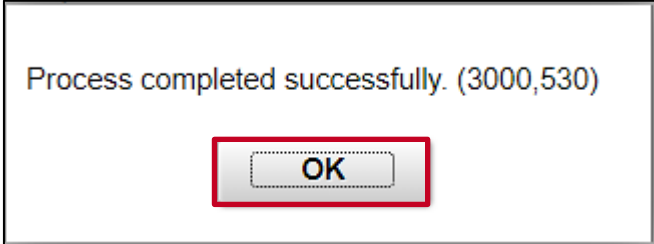
| Select | Empl Record | Action Source | Event Date | Event Effseq | BAS Action | COBRA Action |
|--------------------------|-------------|---------------|------------|--------------|------------|--------------|
| <input type="checkbox"/> | 0 | Manual Event | 11/06/2023 | 0 | HR2 | |

7. Click the **OK** button.

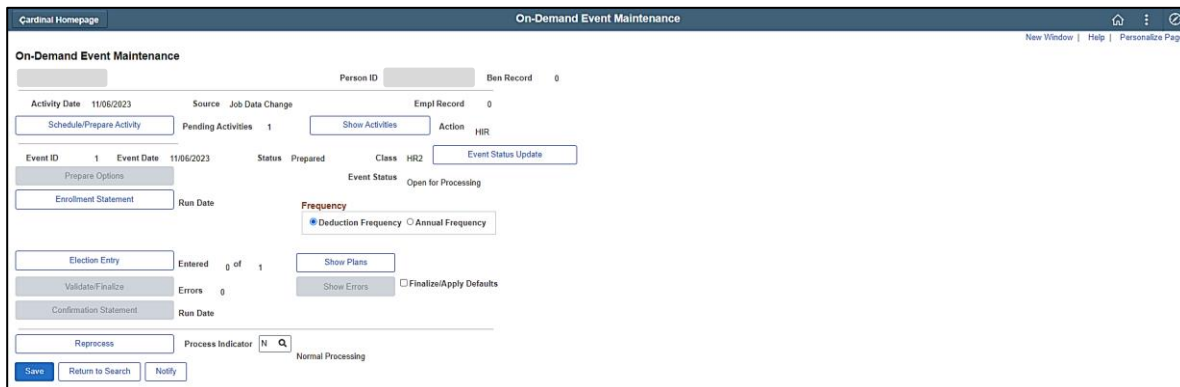


The **On-Demand Event Maintenance** page redisplay.




| Step | Action |
|---|---|
|  | <p>Review the Activity Date field. This is the date of the employee's New Hire transaction completed by HR. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with your Agency HR to correct prior to processing the new hire benefits enrollment.</p> <p>For HR2 Benefit Events, the Source field will be "Manual Event" and the Action field will be "HR2".</p>  |
| 8. | <p>Click the Schedule/Prepare Activity button to manually run the Benefits Administration process for this Benefit Event.</p> <p>This will process and close the HR2 Benefit Event.</p>  |
| 9. | <p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <p>Click the OK button to close the message.</p>  |

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

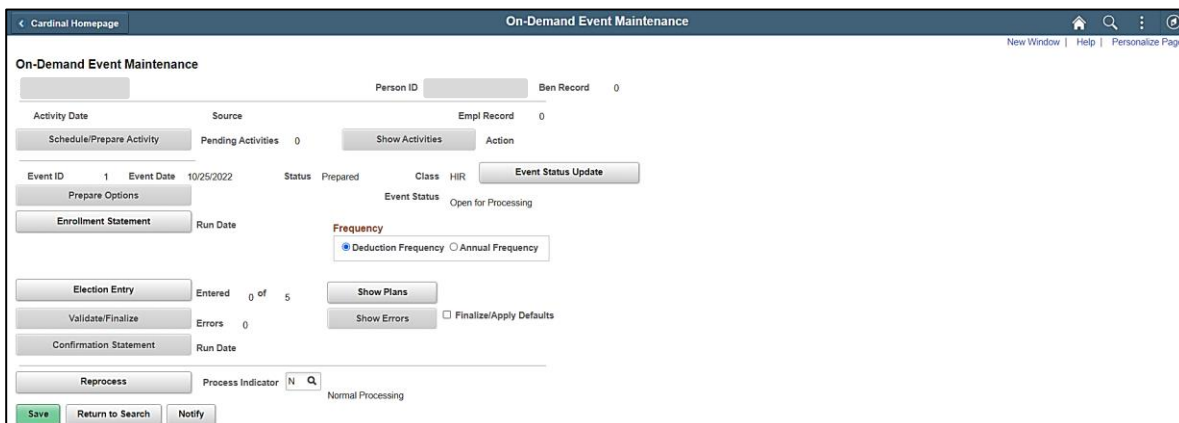


The screenshot shows the 'On-Demand Event Maintenance' page with the following details:


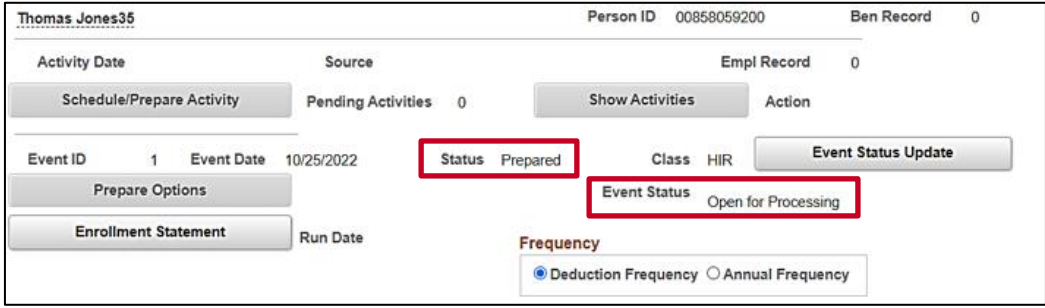
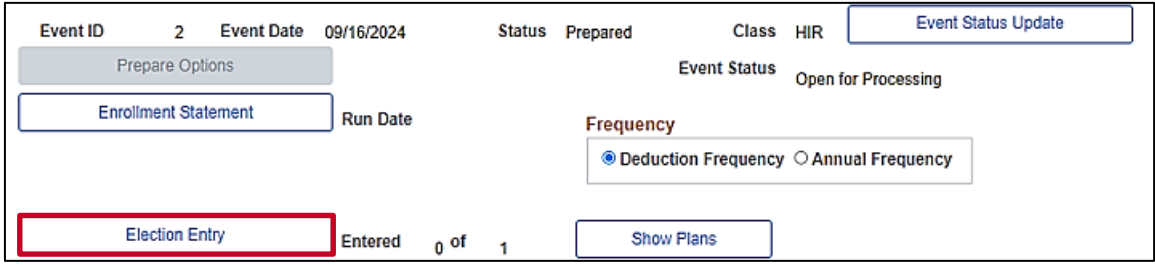
- Person ID: [Redacted] Ben Record: 0
- Activity Date: 11/06/2023 Source: Job Data Change Empl Record: 0
- Buttons: Schedule/Prepare Activity, Pending Activities: 1, Show Activities, Action: HIR
- Event ID: 1 Event Date: 11/06/2023 Status: Prepared Class: HR2 Event Status Update
- Buttons: Prepare Options, Enrollment Statement, Run Date, Event Status: Open for Processing
- Frequency: Deduction Frequency Annual Frequency
- Buttons: Election Entry, Entered: 0 of 1, Show Plans, Validate/Finalize, Errors: 0, Show Errors, Finalize/Apply Defaults
- Buttons: Confirmation Statement, Run Date, Reprocess, Process Indicator: N, Normal Processing
- Buttons: Save, Return to Search, Notify

| Step | Action |
|---|--|
|  | <p>Review the Activity Date field. This is the date of the employee’s New Hire transaction completed by HR. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with Agency HR to correct prior to processing the new hire benefits enrollment.</p> <p>For HIR Benefit Events, the Source field will be “Job Data Change” and the Action field will be “HIR”.</p> <div data-bbox="259 562 1404 661" style="border: 1px solid black; padding: 5px;"> <p>Activity Date 09/16/2024 Source Job Data Change Empl Record 0</p> <p><input type="button" value="Schedule/Prepare Activity"/> Pending Activities 1 <input type="button" value="Show Activities"/> Action HIR</p> </div> |
| 10. | <p>Click the Schedule/Prepare Activity button.</p> <p>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.</p> <div data-bbox="259 867 1404 966" style="border: 1px solid black; padding: 5px;"> <p>Activity Date 09/16/2024 Source Job Data Change Empl Record 0</p> <p><input type="button" value="Schedule/Prepare Activity"/> Pending Activities 1 <input type="button" value="Show Activities"/> Action HIR</p> </div> |
| 11. | <p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <p>Click the OK button to close the message.</p> <div data-bbox="527 1140 1177 1381" style="border: 1px solid black; padding: 20px; text-align: center;"> <p>Process completed successfully. (3000,530)</p> <p><input type="button" value="OK"/></p> </div> |

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

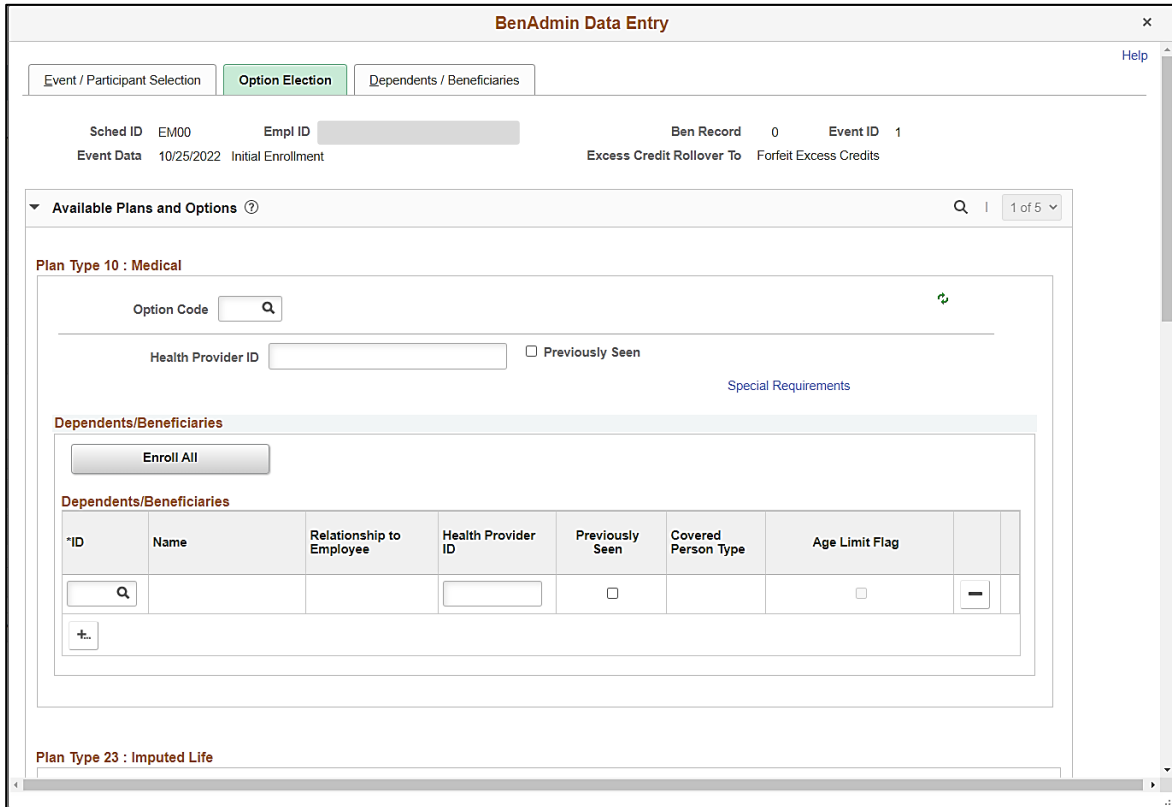


The screenshot shows the 'On-Demand Event Maintenance' page. At the top, it displays 'Cardinal Homepage' and 'On-Demand Event Maintenance'. Below this, there are fields for 'Person ID', 'Ben Record', 'Activity Date', 'Source', and 'Empl Record'. A 'Schedule/Prepare Activity' button is highlighted with a red box. Below the buttons, there is a table with columns for 'Event ID', 'Event Date', 'Status', and 'Class'. The 'Event ID' is 1, 'Event Date' is 10/25/2022, 'Status' is 'Prepared', and 'Class' is 'HIR'. There is an 'Event Status Update' button. Below the table, there are sections for 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', and 'Confirmation Statement'. At the bottom, there are buttons for 'Reprocess', 'Save', 'Return to Search', and 'Notify'. The 'Process Indicator' is set to 'N' and the status is 'Normal Processing'.

| Step | Action |
|---|--|
|  | <p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p>  |
| 12. | <p>Click the Election Entry button.</p>  |

| Step | Action |
|------|--------|
|------|--------|

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

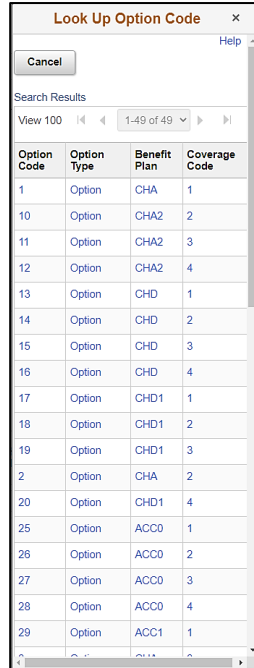


13. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section.



| Step | Action |
|------|--------|
|------|--------|

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 |

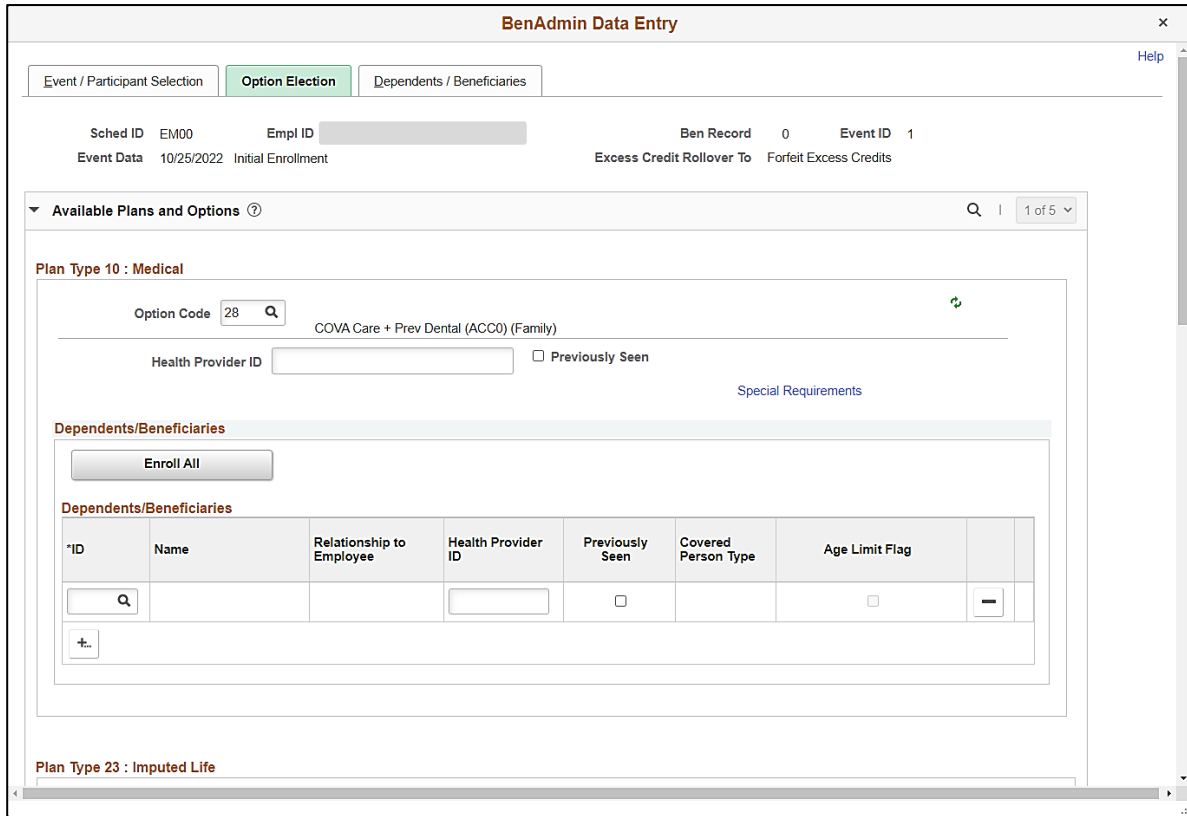
14. Select the applicable Benefit Plan and Coverage Code (based on the employee's Benefits Enrollment form) by clicking the corresponding link in the **Option Code** column (Benefit Plan "ACC0" with Coverage Code "4" will be selected in this example).

The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child (except for Tricare), and 4 – Employee + 2 or More Dependents (Family -except for Tricare), 8 – Employee + Child(ren) (Tricare only), and 9 – Family (EE + SP +Child/ren for Tricare only).

| | | | |
|----|--------|------|---|
| 28 | Option | ACC0 | 4 |
|----|--------|------|---|

| Step | Action |
|------|--------|
|------|--------|

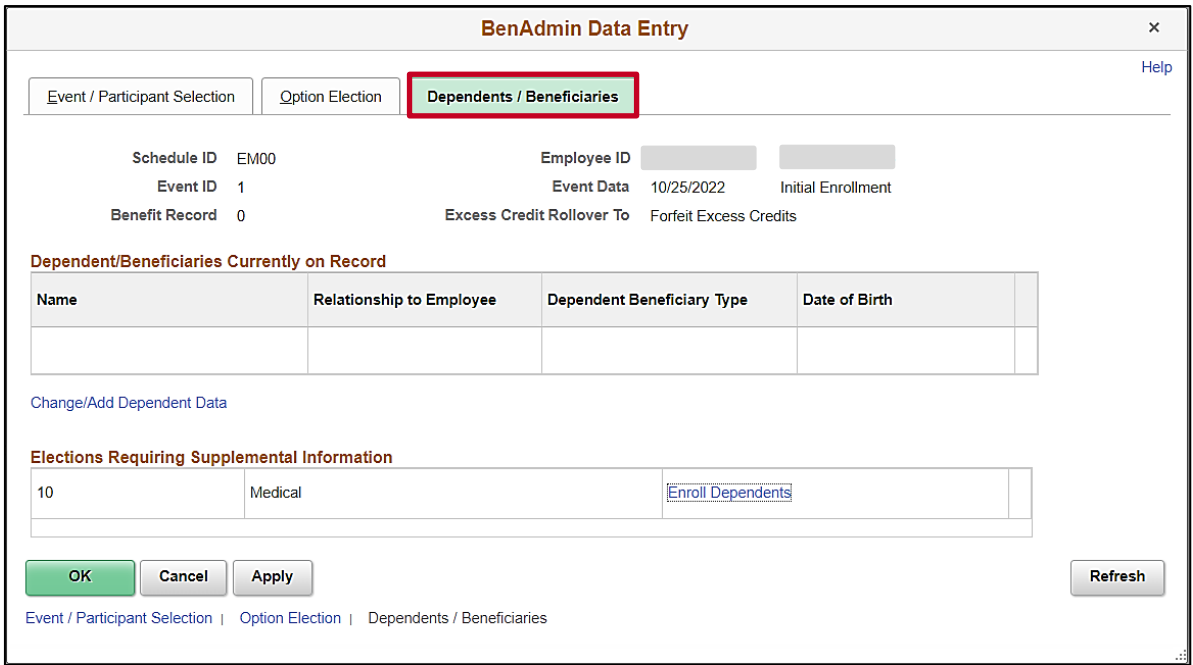
The **Option Election** tab redisplay.



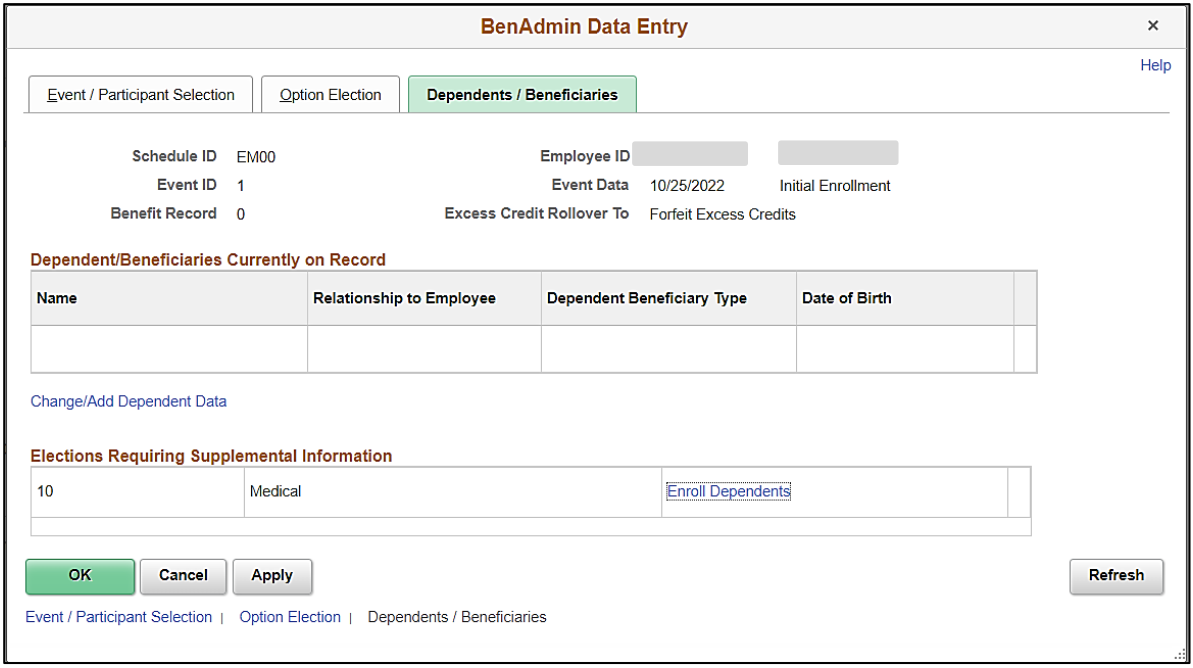
The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The interface includes fields for 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Key data points include: Sched ID EM00, Empl ID (redacted), Ben Record 0, Event ID 1, Event Data 10/25/2022 Initial Enrollment, and Excess Credit Rollover To Forfeit Excess Credits. The 'Available Plans and Options' section is expanded to show 'Plan Type 10 : Medical'. Under this plan, the 'Option Code' is 28, and the plan name is 'COVA Care + Prev Dental (ACC0) (Family)'. There is a 'Health Provider ID' field and a 'Previously Seen' checkbox. Below this is a 'Dependents/Beneficiaries' section with an 'Enroll All' button and a table for listing dependents. The table has columns for ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. A 'Special Requirements' link is also visible.



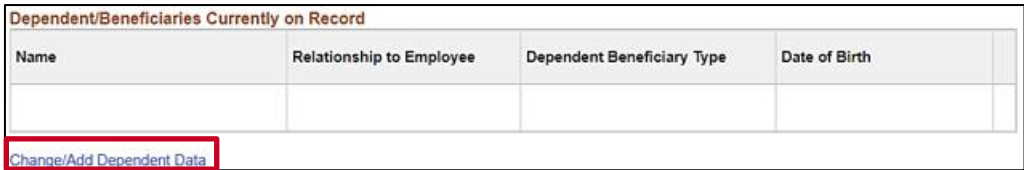
If the employee is single and elected a Benefit Plan with a Coverage Code of “1”, skip to Step 38. If the employee selected a Benefit Plan with any other Coverage Code, the employee’s dependent(s) must be added. Proceed with Step 15.

| Step | Action |
|------|--|
| 15. | <p>Click the Dependents / Beneficiaries tab.</p>  <p>The screenshot shows the BenAdmin Data Entry window with the 'Dependents / Beneficiaries' tab selected. The interface includes fields for Schedule ID (EM00), Event ID (1), and Benefit Record (0). It also displays Employee ID, Event Data (10/25/2022), and Initial Enrollment. A table titled 'Dependent/Beneficiaries Currently on Record' is present but empty. Below it is a section for 'Elections Requiring Supplemental Information' with a value of 10 and 'Medical' selected. At the bottom are buttons for OK, Cancel, Apply, and Refresh.</p> |

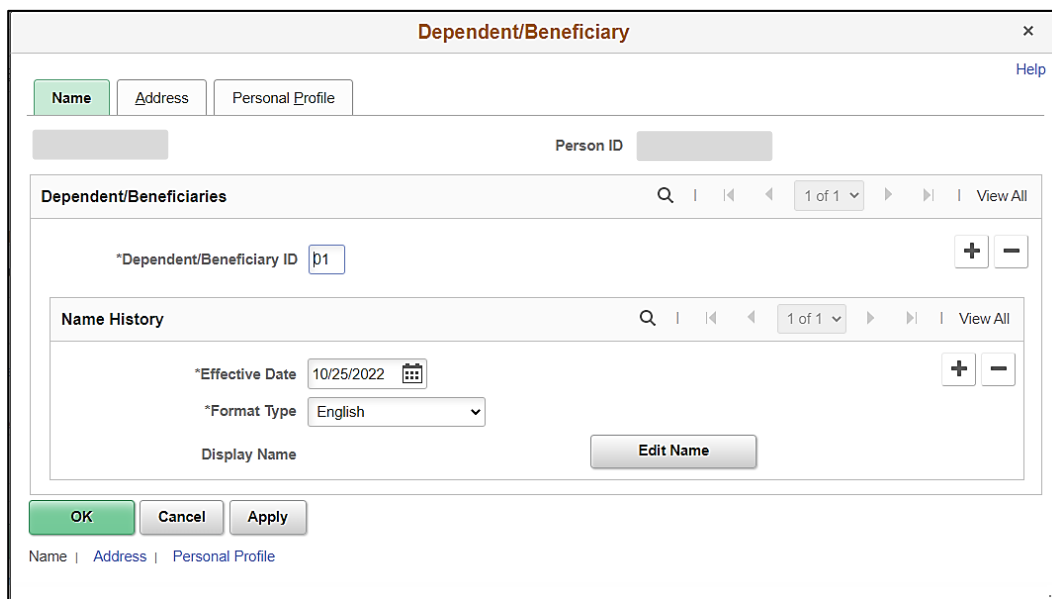
The **Dependent / Beneficiaries** tab displays.



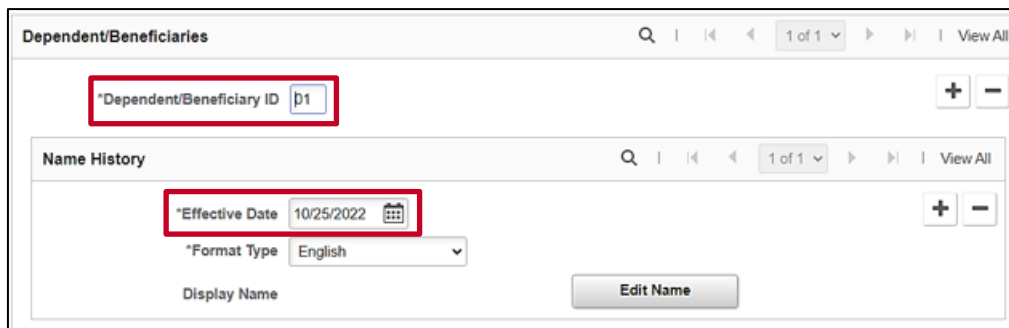
The screenshot shows the BenAdmin Data Entry window with the 'Dependents / Beneficiaries' tab active and highlighted in green. The interface displays the same information as the previous screenshot, including the 'Dependent/Beneficiaries Currently on Record' table and the 'Elections Requiring Supplemental Information' section.

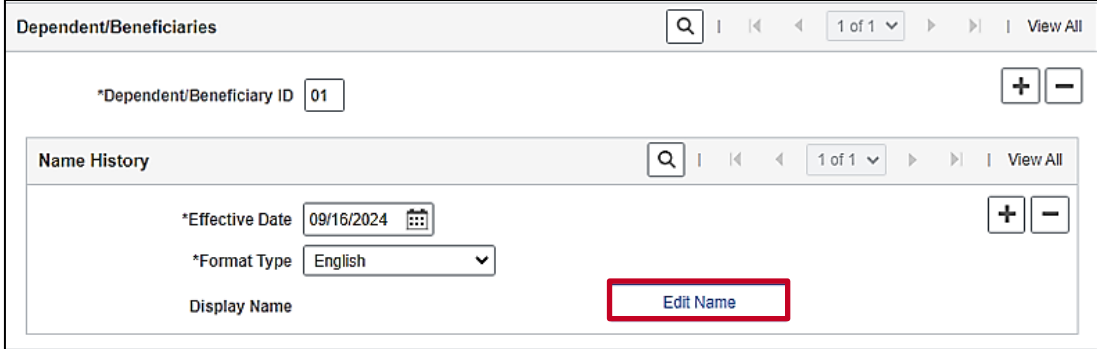
| Step | Action |
|------|--|
| 16. | <p>Click the Change/Add Dependent Data link.</p>  |

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

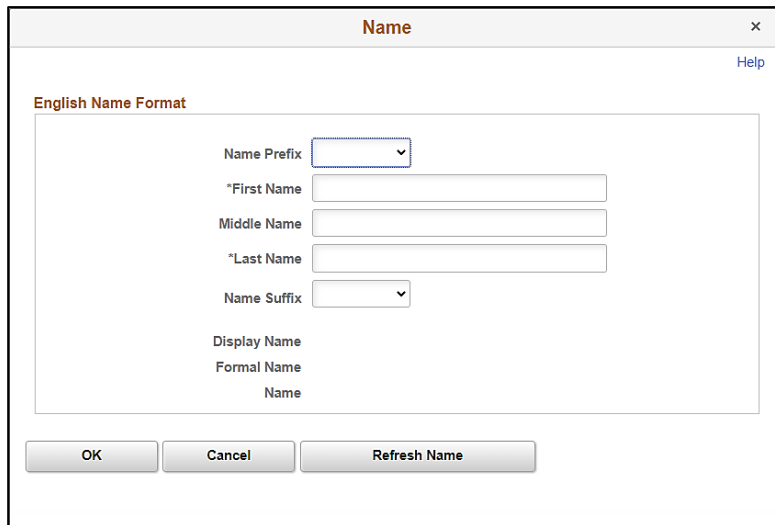


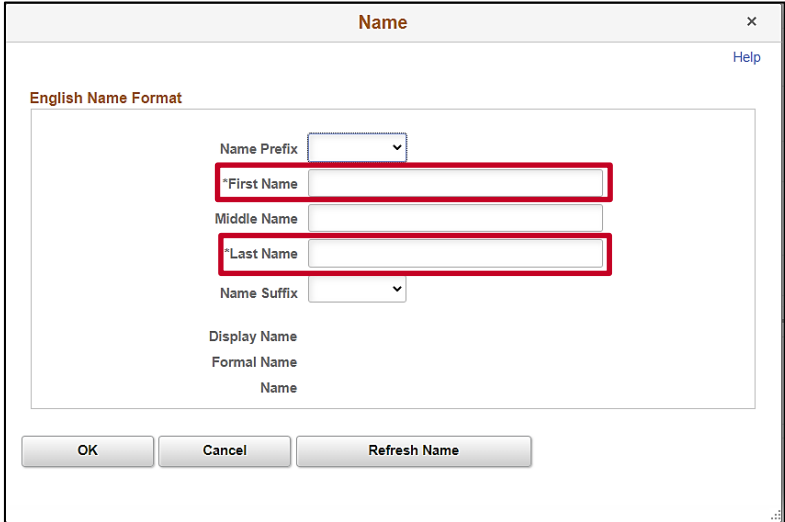
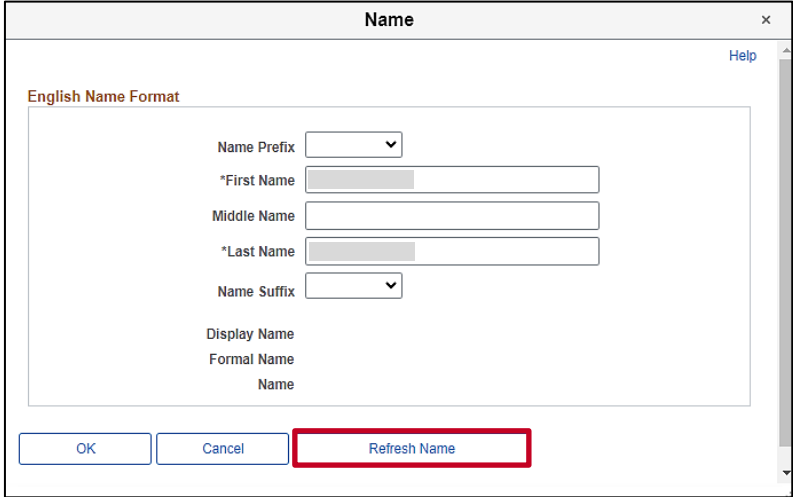

The **Effective Date** field defaults to the Event Date (employee's hire date for new hire enrollments). This date must be on or before the new hire event date and should not be updated. The **Dependent/Beneficiary ID** field will default to "01" for the first dependent and increment by 1 for each additional dependent subsequently added.



| Step | Action |
|------|--|
| 17. | <p>Click the Edit Name button.</p>  |

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



| Step | Action |
|------|---|
| 18. | <p>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.</p>  <p>The screenshot shows a dialog box titled "Name" with a "Help" link. Under the "English Name Format" section, there are several input fields: "Name Prefix" (dropdown), "*First Name" (text box, highlighted with a red box), "Middle Name" (text box), "*Last Name" (text box, highlighted with a red box), and "Name Suffix" (dropdown). Below these are labels for "Display Name", "Formal Name", and "Name". At the bottom are "OK", "Cancel", and "Refresh Name" buttons.</p> |
| 19. | <p>Click the Refresh Name button.</p>  <p>The screenshot shows the same "Name" dialog box. The "Refresh Name" button at the bottom is highlighted with a red box. The "First Name" and "Last Name" fields now contain greyed-out text, indicating they have been populated.</p> |

| Step | Action |
|------|---|
| | <p>The Name page refreshes.</p> <div data-bbox="410 380 1190 898" style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="text-align: right; border-bottom: 1px solid gray; padding-bottom: 5px;">Name x</div> <div style="text-align: right; padding-right: 5px;">Help</div> <p>English Name Format</p> <div style="border: 1px solid gray; padding: 5px; margin: 5px 0;"> <p>Name Prefix <input type="text"/></p> <p>*First Name <input type="text"/></p> <p>Middle Name <input type="text"/></p> <p>*Last Name <input type="text"/></p> <p>Name Suffix <input type="text"/></p> <p>Display Name <input type="text"/></p> <p>Formal Name <input type="text"/></p> <p>Name <input type="text"/></p> </div> <div style="display: flex; justify-content: space-around; margin-top: 5px;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Refresh Name"/> </div> </div> |

| Step | Action |
|------|--------|
|------|--------|

The **Name** tab redisplay.

x
Help

Name
Address
Personal Profile

Person ID

Dependent/Beneficiaries
Q | < << 1 of 1 >> > | View All

*Dependent/Beneficiary ID
01
+ -

Name History
Q | < << 1 of 1 >> > | View All

*Effective Date
10/25/2022
📅
+ -

*Format Type
English
▼

Display Name

Edit Name

OK
Cancel
Apply

[Name](#) | [Address](#) | [Personal Profile](#)

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

Name History
Q | < << 1 of 1 >> > | View All

*Effective Date
10/25/2022
📅
+ -

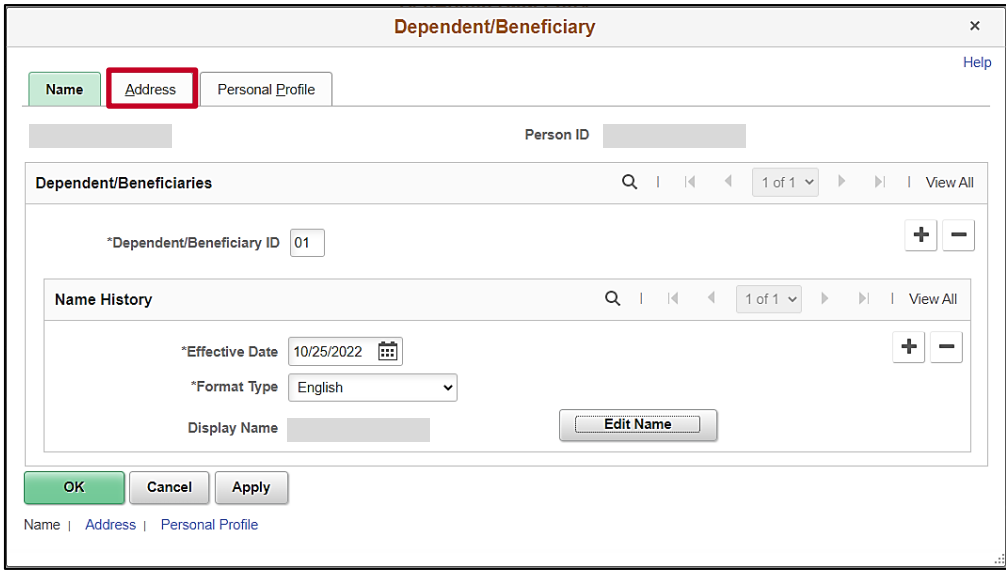
*Format Type
English
▼

Display Name

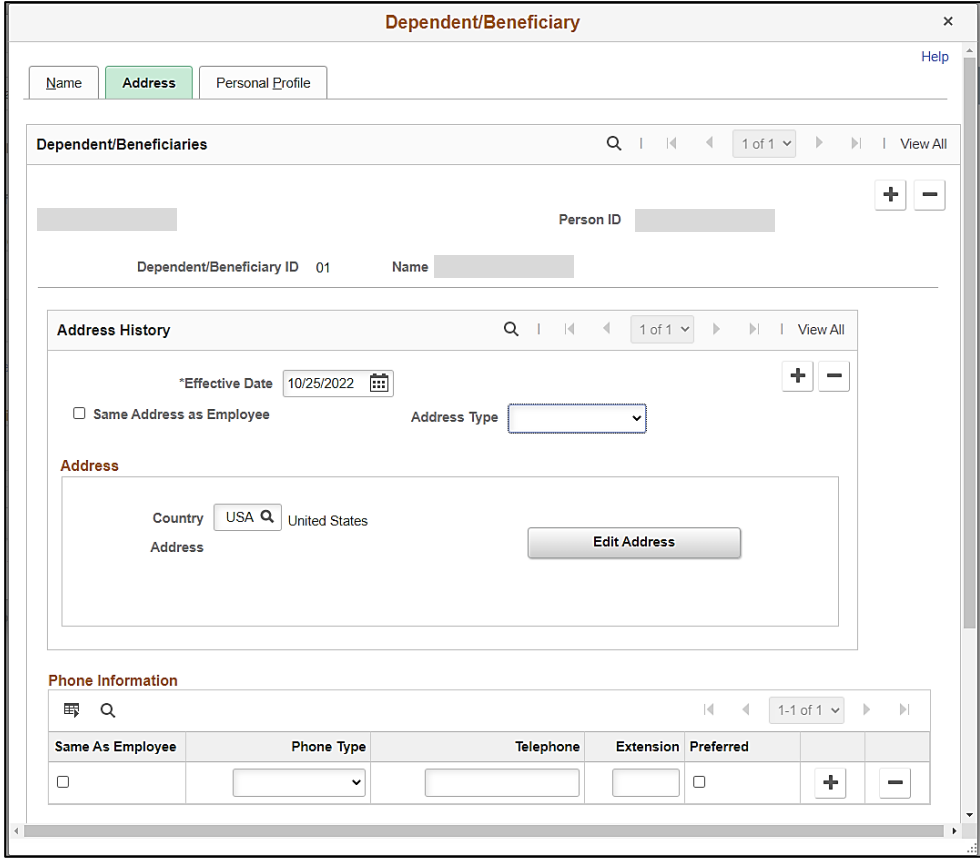
Edit Name

Rev 3/1/2025

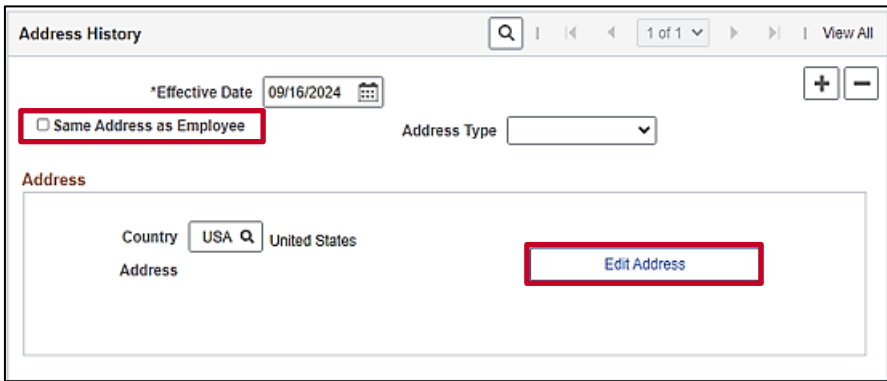
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| Step | Action |
|------|--|
| 21. | <p>Click the Address tab at the top of the page.</p>  <p>The screenshot shows the 'Dependent/Beneficiary' form with three tabs: 'Name', 'Address', and 'Personal Profile'. The 'Address' tab is highlighted with a red border. Below the tabs, there are fields for 'Person ID', 'Dependent/Beneficiaries' (with a search and pagination bar), and 'Name History' (with an effective date of 10/25/2022 and a format type of English). At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons, and a breadcrumb trail: 'Name Address Personal Profile'.</p> |

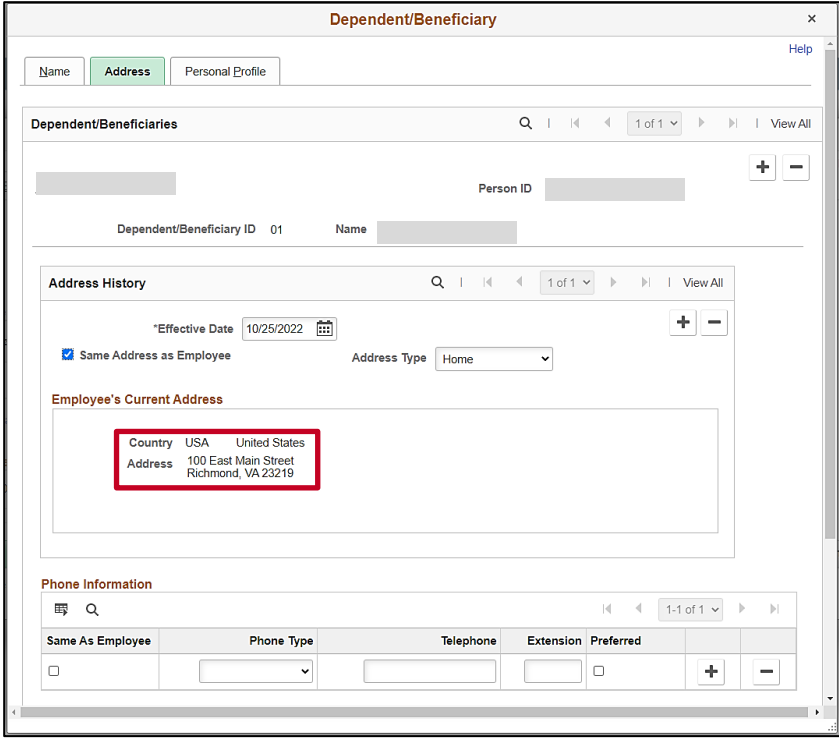
The **Address** tab displays.

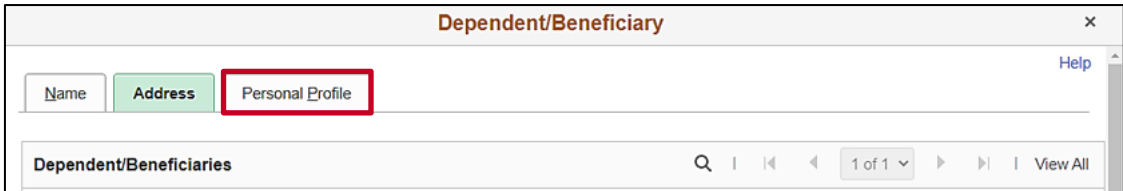


The screenshot shows the 'Dependent/Beneficiary' form with the 'Address' tab selected. The 'Name' tab is now greyed out. The 'Address History' section is visible, showing an effective date of 10/25/2022 and a checkbox for 'Same Address as Employee'. Below this, there is an 'Address' section with a 'Country' dropdown set to 'USA' and a search icon, and an 'Edit Address' button. At the bottom, there is a 'Phone Information' section with a search bar and a table with columns: 'Same As Employee', 'Phone Type', 'Telephone', 'Extension', and 'Preferred'. The table has a '+' and '-' button at the end of each row.

| Step | Action |
|------|---|
| 22. | <p>Complete the address information as applicable for the dependent by either:</p> <ul style="list-style-type: none"> Clicking the Same Address as Employee checkbox option (applicable for this example) <p>or</p> <ul style="list-style-type: none"> 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)  |

The **Address** tab refreshes. The Address information auto-populates in the **Employee's Current Address** section.



| Step | Action |
|------|---|
| 23. | Click the Personal Profile tab at the top of the page. <div data-bbox="256 373 1372 562" style="border: 1px solid black; padding: 5px; margin-top: 10px;">  </div> |

The **Personal Profile** tab displays.

Dependent/Beneficiary

x

Name
Address
Personal Profile

Help

Dependent/Beneficiaries
Q | < << 1 of 1 >> >
View All

*Date of Birth 📅

Birth Country 🔍

Date of Death 📅

Medicare Entitled Date 📅

Birth Location

Birth State 🔍

Riders/Orders exist

Riders/Orders

Personal History
Q | < << 1 of 1 >> >
View All

*Effective Date 📅

*Relationship to Employee

*Dependent Beneficiary Type

*Gender

*Marital Status

Student

Disabled

Smoker

As of 📅

As of 📅







As of 📅

As of 📅

Occupation

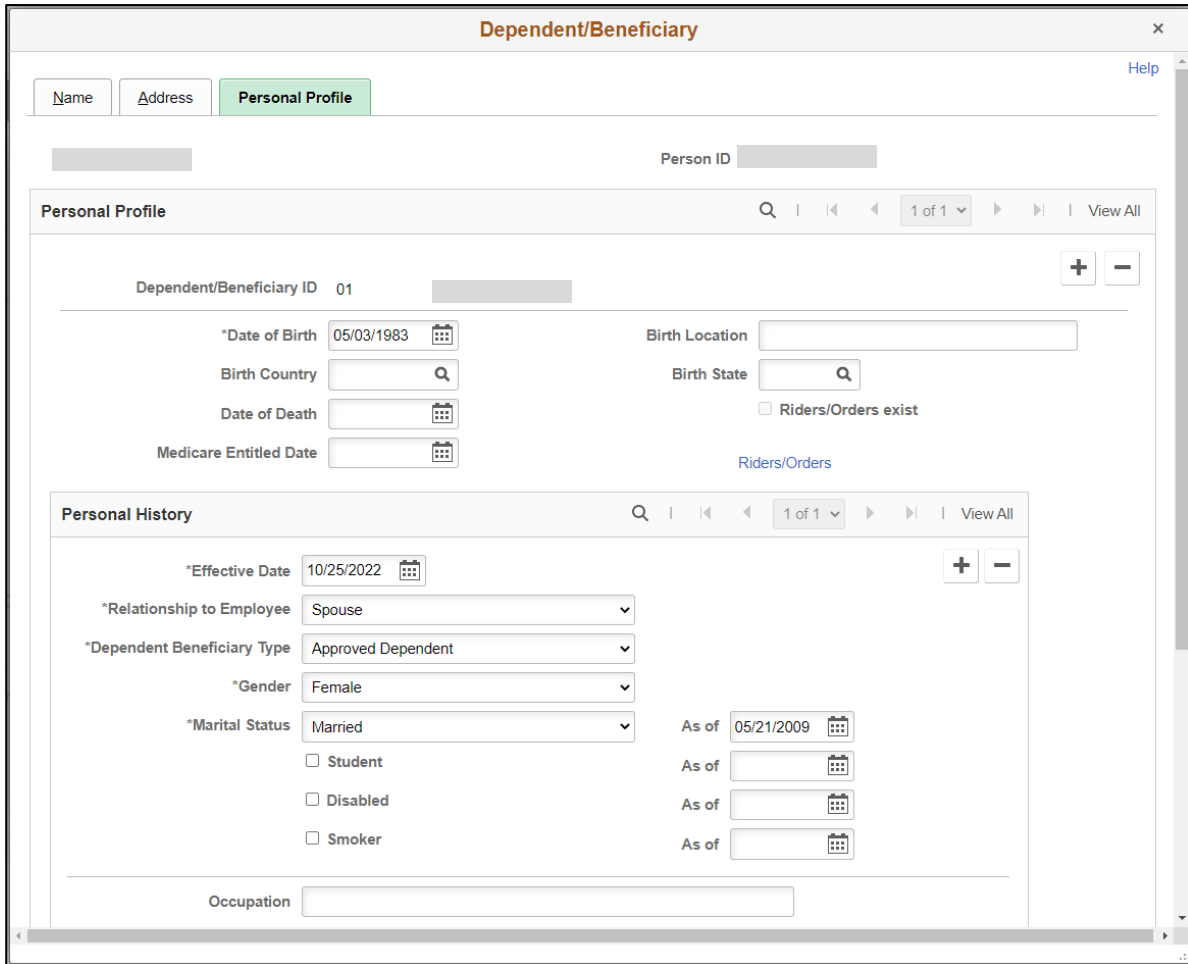


The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this information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

| Step | Action |
|------|--|
| 24. | Click the Date of Birth Calendar icon and select the dependent's date of birth.  |
| 25. | Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee.  |
| 26. | Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent"  |
| 27. | Click the Gender dropdown button and select the dependent's gender ("Unknown", "Male", or "Female").  |
| 28. | The Marital Status field defaults to "Single". Updated as needed for the dependent.  |
| 29. | If any status other than "Single" is selected, the Marital Status As of field will default to the date of hire and must be updated as applicable using the Marital Status As of Calendar icon.  |

| Step | Action |
|------|--------|
|------|--------|

The updated **Dependent/ Beneficiary** page 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, there is a "Person ID" field. The main content area is divided into two sections: "Personal Profile" and "Personal History".

Personal Profile Section:

- Dependent/Beneficiary ID: 01
- *Date of Birth: 05/03/1983
- Birth Country: [Searchable field]
- Date of Death: [Calendar icon]
- Medicare Entitled Date: [Calendar icon]
- Birth Location: [Text field]
- Birth State: [Searchable field]
- Riders/Orders exist
- [Riders/Orders](#)

Personal History Section:

- *Effective Date: 10/25/2022
- *Relationship to Employee: Spouse
- *Dependent Beneficiary Type: Approved Dependent
- *Gender: Female
- *Marital Status: Married
- Student
- Disabled
- Smoker
- As of: 05/21/2009
- As of: [Calendar icon]
- As of: [Calendar icon]
- As of: [Calendar icon]
- Occupation: [Text field]

| | |
|-----|--|
| 30. | Scroll down to the National ID section of the page. |
|-----|--|

| Step | Action |
|------|--------|
|------|--------|

The bottom of the **Dependent/ Beneficiary** page displays.

Dependent/Beneficiary

Medicare Entitled Date
Riders/Orders

Personal History
Q | < | > | 1 of 1 | View All

*Effective Date

*Relationship to Employee

*Dependent Beneficiary Type

*Gender

*Marital Status

Student

Disabled

Smoker

As of

As of

As of

As of

Occupation

USA

National ID

🔍 Q
< | > | 1-1 of 1 | View All

| *Country | *National ID Type | Description | National ID | Primary ID | | |
|---|--|------------------------|----------------------|-------------------------------------|----------------------------------|----------------------------------|
| <input type="text" value="USA"/> <input type="button" value="🔍"/> | <input type="text" value="PR"/> <input type="button" value="🔍"/> | Social Security Number | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |


[Name](#) | [Address](#) | [Personal Profile](#)

31. Enter the dependent's Social Security Number (SSN) in the **National ID** field.
- 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.

National ID

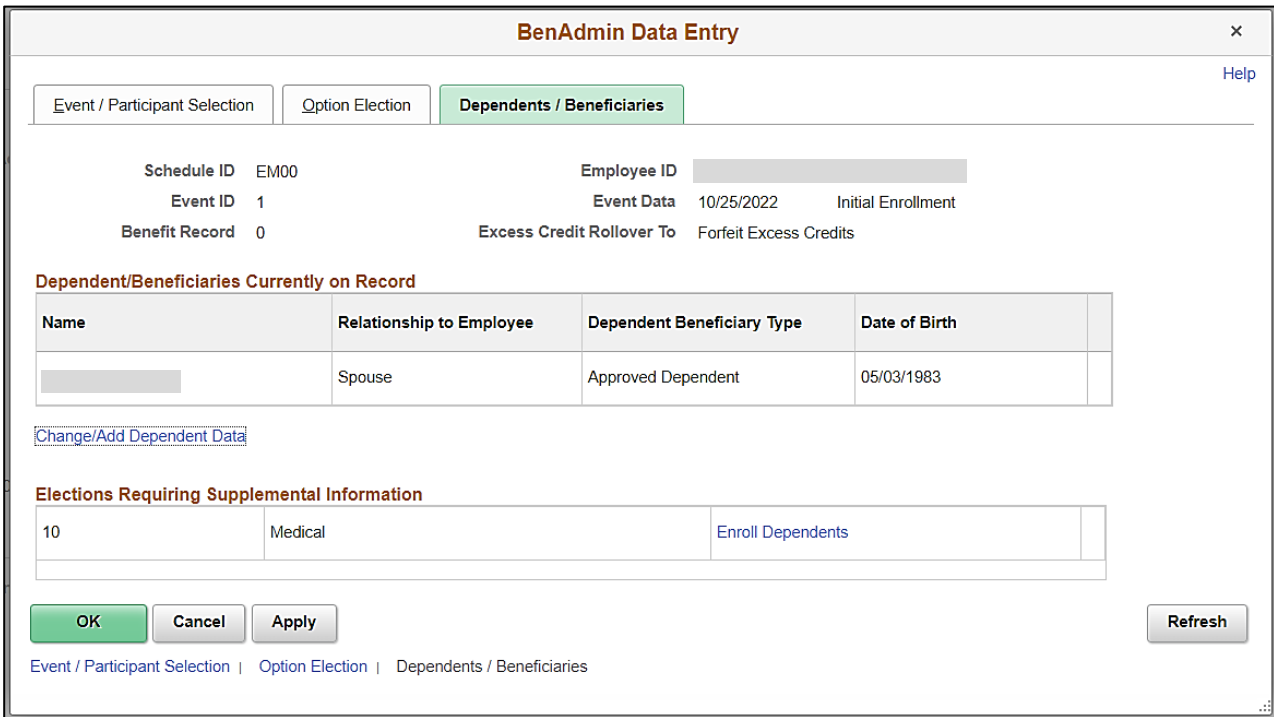
🔍 Q
< | > | 1-1 of 1 | View All

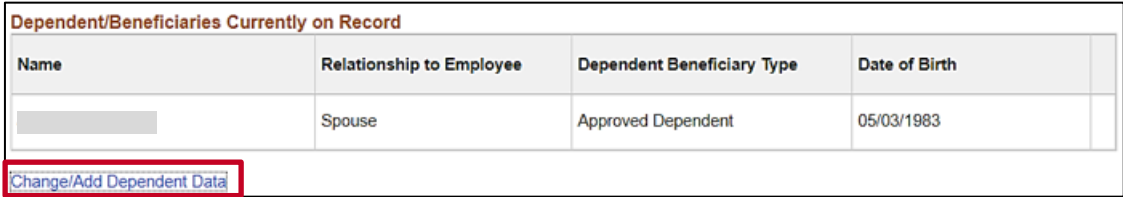
| *Country | *National ID Type | Description | National ID | Primary ID | | |
|---|--|------------------------|----------------------|-------------------------------------|----------------------------------|----------------------------------|
| <input type="text" value="USA"/> <input type="button" value="🔍"/> | <input type="text" value="PR"/> <input type="button" value="🔍"/> | Social Security Number | <input type="text"/> | <input checked="" type="checkbox"/> | <input type="button" value="+"/> | <input type="button" value="-"/> |

| Step | Action |
|------|--|
| 32. | <p>Click the OK button.</p>  |

The **Dependents / Beneficiaries** tab redisplay.

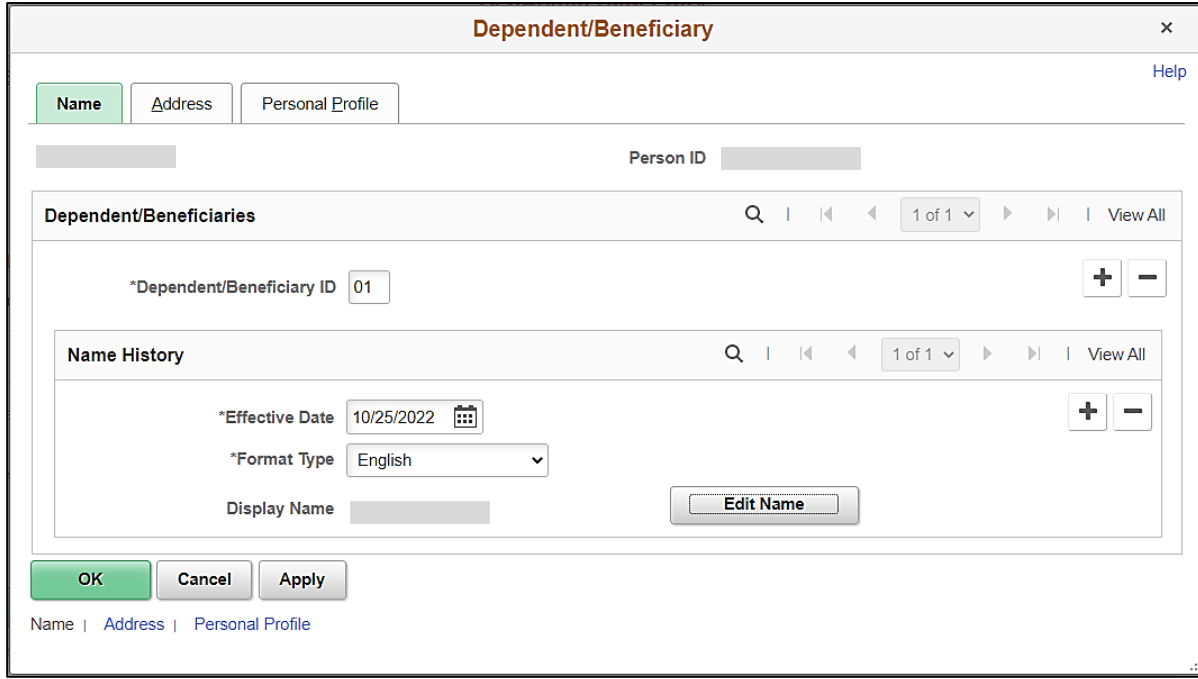
If additional dependents need to be added, continue with Step 33. If no additional dependents need to be added, skip to Step 38.



| | |
|-----|---|
| 33. | <p>Click the Change/ Add Dependent Data link.</p>  |
|-----|---|

| Step | Action |
|------|--------|
|------|--------|

The **Name** tab redisplay.



Dependent/Beneficiary x

[Help](#)

Name | [Address](#) | [Personal Profile](#)

Person ID

Dependent/Beneficiaries Q | < << 1 of 1 >> > | View All

*Dependent/Beneficiary ID + -

Name History Q | < << 1 of 1 >> > | View All

*Effective Date + -

*Format Type v

Display Name

[Name](#) | [Address](#) | [Personal Profile](#)

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



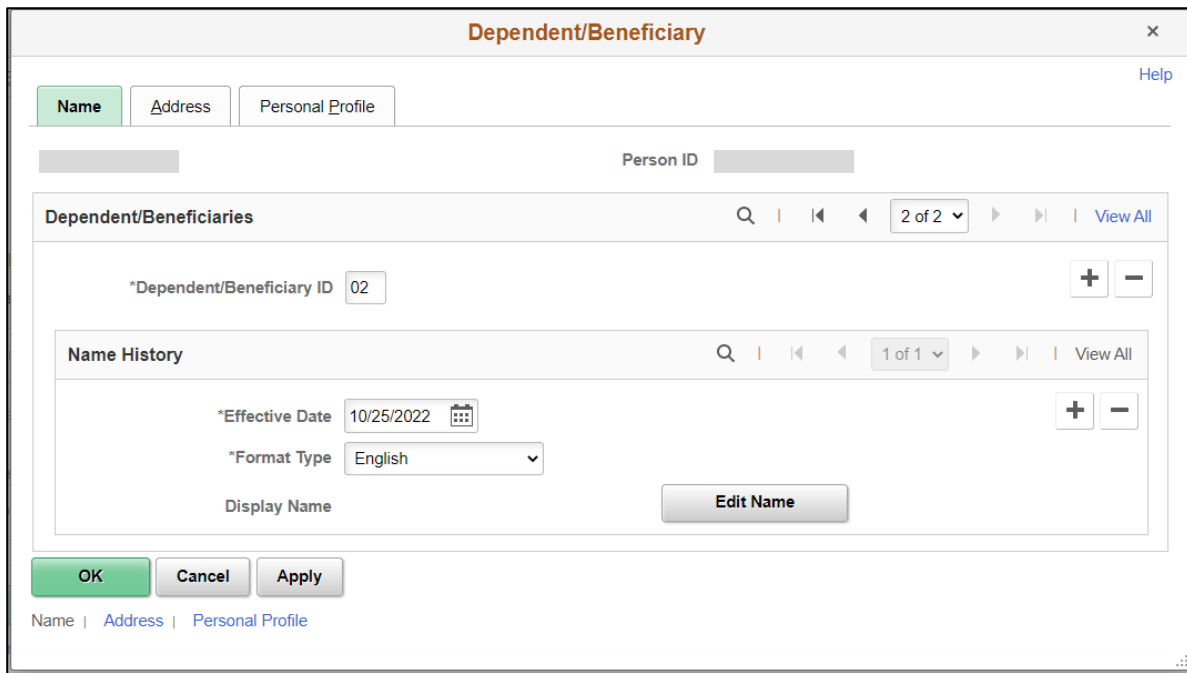
Dependent/Beneficiaries Q | < << 1 of 1 >> > | View All

*Dependent/Beneficiary ID **+** -

| Step | Action |
|------|--------|
|------|--------|

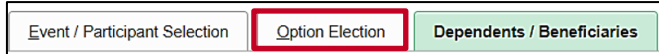
The page refreshes with a new row.

The **Dependent/Beneficiary ID** field increments by “1” (“02” in this example as this is the second dependent being added). Repeat Steps 17 – 32 to complete the data entry for the next dependent and then repeat as needed until all dependents have been added.



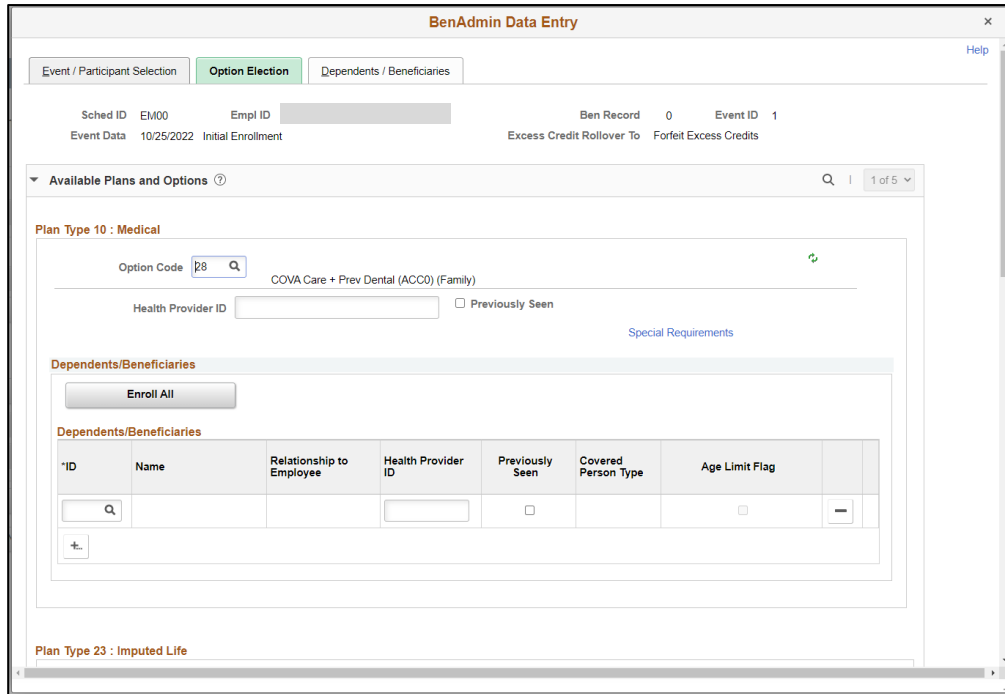

All dependents that have been added display in the **Dependent/Beneficiaries Currently on Record** section.

| Dependent/Beneficiaries Currently on Record | | | |
|---|--------------------------|----------------------------|---------------|
| Name | Relationship to Employee | Dependent Beneficiary Type | Date of Birth |
| [Redacted] | Spouse | Approved Dependent | 05/03/1983 |

| | |
|-----|---|
| 35. | <p>Click the Option Election tab at the top of the page.</p>  |
|-----|---|

| Step | Action |
|------|--------|
|------|--------|

The **Option Election** tab redisplay.



The screenshot shows the 'BenAdmin Data Entry' application window with the 'Option Election' tab selected. The interface includes a header with 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries' tabs. Below the tabs, there are fields for 'Sched ID' (EM00), 'Empl ID', 'Ben Record' (0), and 'Event ID' (1). A search bar is visible with '1 of 5' results. The main content area is titled 'Available Plans and Options' and shows 'Plan Type 10 : Medical' selected. Under this plan, there is an 'Option Code' field with '28' and a search icon, and a description 'COVA Care + Prev Dental (ACC0) (Family)'. There is also a 'Health Provider ID' field and a 'Previously Seen' checkbox. Below this is a 'Dependents/Beneficiaries' section with an 'Enroll All' button and a table with columns: *ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. A search icon and an 'Add Multiple Rows' (+...) icon are also present in the table area.

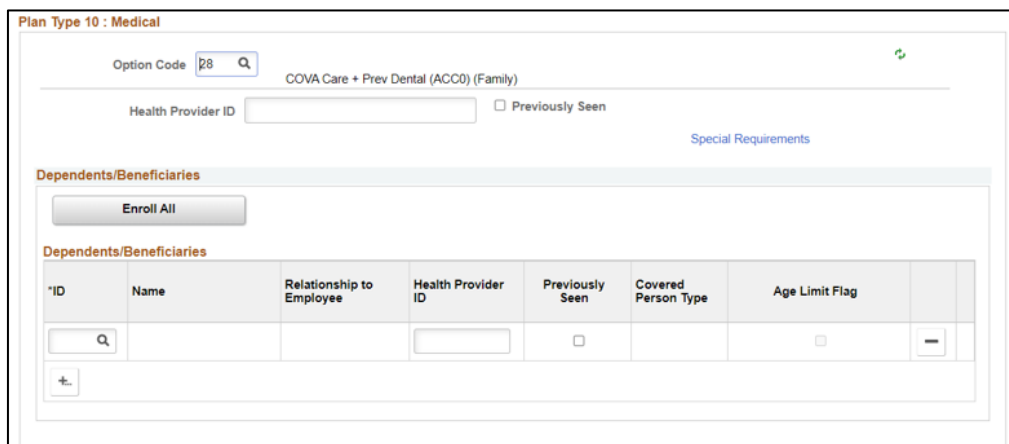
36.

Next, enroll the dependents in the previously selected Medical Plan by either:

- Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example)

Or

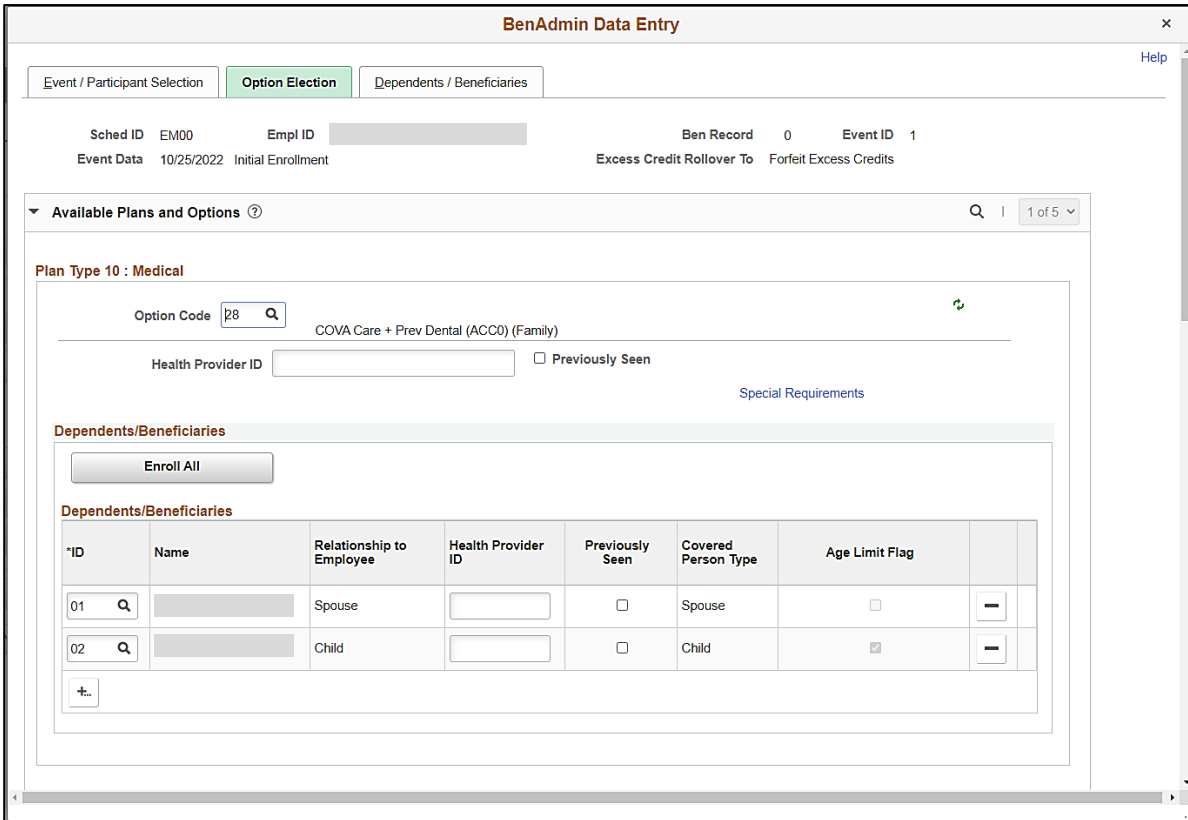
- Adding the applicable dependents individually using the **ID Look Up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (+...)



This is a close-up view of the 'Plan Type 10 : Medical' section from the previous screenshot. It shows the 'Option Code' field with '28', the plan name 'COVA Care + Prev Dental (ACC0) (Family)', and the 'Health Provider ID' field. Below this is the 'Dependents/Beneficiaries' section, which includes an 'Enroll All' button and a table with columns: *ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. A search icon and an 'Add Multiple Rows' (+...) icon are also visible.

| Step | Action |
|------|--------|
|------|--------|

The page refreshes.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] Ben Record 0 Event ID 1
 Event Data 10/25/2022 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ②

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 |
|----|------------|--------------------------|--------------------|--------------------------|---------------------|-------------------------------------|
| 01 | [REDACTED] | Spouse | [REDACTED] | <input type="checkbox"/> | Spouse | <input type="checkbox"/> |
| 02 | [REDACTED] | Child | [REDACTED] | <input type="checkbox"/> | Child | <input checked="" type="checkbox"/> |

37. The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.

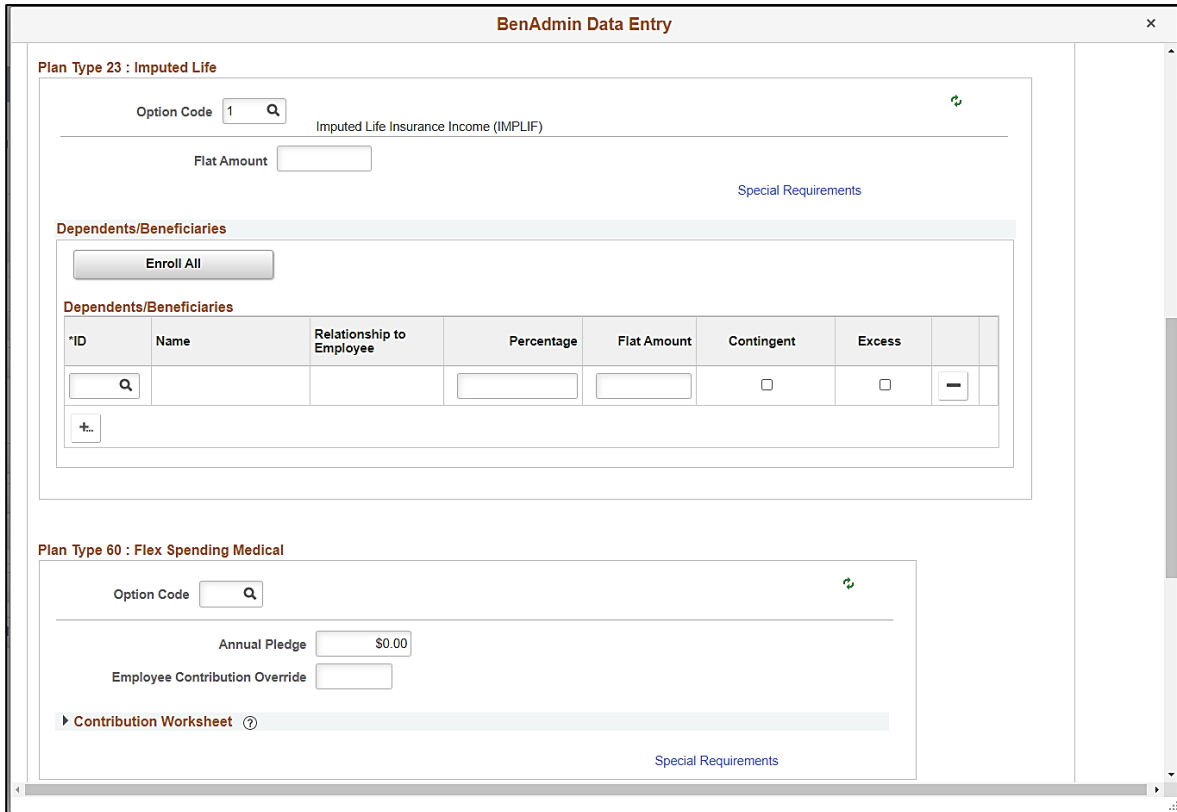
Dependents/Beneficiaries

| ID | Name | Relationship to Employee | Health Provider ID | Previously Seen | Covered Person Type | Age Limit Flag |
|----|------------|--------------------------|--------------------|--------------------------|---------------------|-------------------------------------|
| 01 | [REDACTED] | Spouse | [REDACTED] | <input type="checkbox"/> | Spouse | <input type="checkbox"/> |
| 02 | [REDACTED] | Child | [REDACTED] | <input type="checkbox"/> | Child | <input checked="" type="checkbox"/> |

38. Click the vertical scrollbar to scroll down on the **Option Election** tab.

| Step | Action |
|------|--------|
|------|--------|

The **Plan Type 23: Imputed Life** section displays.



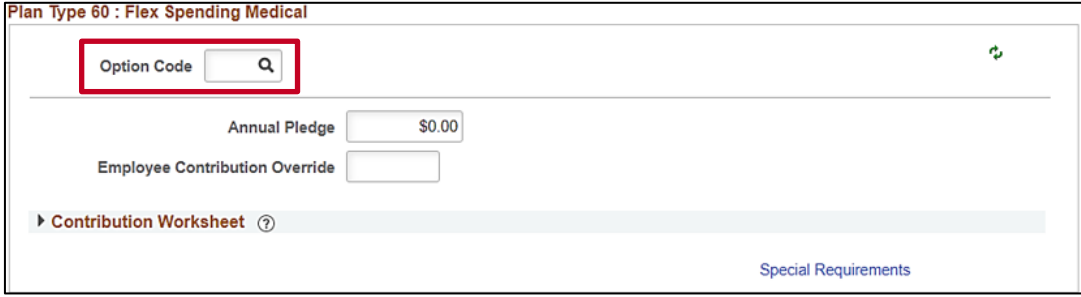
The screenshot shows the BenAdmin Data Entry interface. The top section is titled "Plan Type 23 : Imputed Life". It includes an "Option Code" field with the value "1", a search icon, and a refresh icon. Below this is the "Imputed Life Insurance Income (IMPLIF)" section with a "Flat Amount" input field and a "Special Requirements" link. A "Dependents/Beneficiaries" section contains an "Enroll All" button and a table with columns: *ID, Name, Relationship to Employee, Percentage, Flat Amount, Contingent, Excess, and a minus sign. The table is currently empty. Below this is the "Plan Type 60 : Flex Spending Medical" section, which includes an "Option Code" field, an "Annual Pledge" field with the value "\$0.00", and an "Employee Contribution Override" field. There is also a "Contribution Worksheet" link with a question mark icon and a "Special Requirements" link at the bottom.




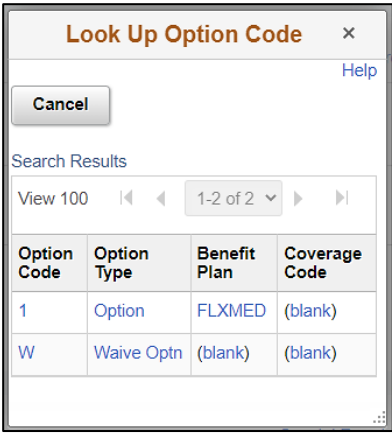
Skip the **Imputed Life** section. The eligible employee was automatically enrolled in the Imputed Life Insurance Income Plan when the HR2 Benefit Event was processed. The remaining sections available for the employee on the **Option Election** tab are based on the employee's benefits eligibility.

Cardinal has embedded configurations based on the Commonwealth's Program rules. The specific elections made are based on the employee's Benefit Enrollment form. This Job Aid provides the steps used to elect a Flex Spending Medical Plan, waive the Flex Spending Dependent Care plan, and elect the Flex Spending Admin Fee. If the employee is not electing any additional plans, skip to Step 46.

| Step | Action |
|------|--------|
|------|--------|

| | |
|-----|---|
| 39. | <p>Next, complete the Plan Type 60: Flex Spending Medical section. Click the Flex Spending Medical Option Code Look Up icon.</p>  |
|-----|---|

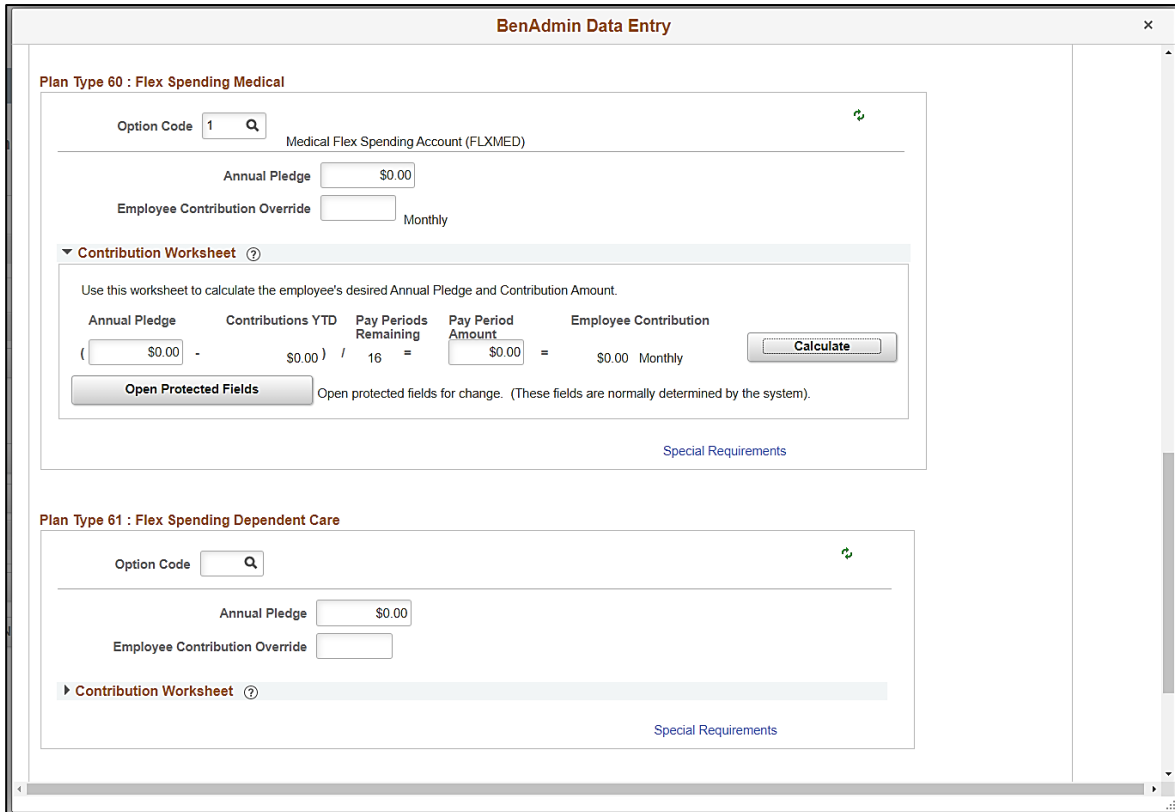
| | |
|---|--|
|  | <p>If Steps 39 - 41 are not completed, the system will automatically waive the Flex Spending Medical plan for the employee as this is not a required plan.</p> |
|---|--|

| | |
|--|--|
| <p>The Look Up Option Code page displays in a pop-up window.</p> | |
|  | |

| 40. | <p>Click the Option Code 1 link.</p> <table border="1" data-bbox="256 1411 734 1543"> <thead> <tr> <th>Option Code</th> <th>Option Type</th> <th>Benefit Plan</th> <th>Coverage Code</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Option</td> <td>FLXMED</td> <td>(blank)</td> </tr> </tbody> </table> | Option Code | Option Type | Benefit Plan | Coverage Code | 1 | Option | FLXMED | (blank) |
|-------------|--|--------------|---------------|--------------|---------------|---|--------|--------|---------|
| Option Code | Option Type | Benefit Plan | Coverage Code | | | | | | |
| 1 | Option | FLXMED | (blank) | | | | | | |

| Step | Action |
|------|--------|
|------|--------|

The **Option Election** tab redispays




The screenshot shows the BenAdmin Data Entry window with two plan sections:

- Plan Type 60 : Flex Spending Medical**
 - Option Code: 1
 - Medical Flex Spending Account (FLXMED)
 - Annual Pledge: \$0.00
 - Employee Contribution Override: Monthly
 - Contribution Worksheet** section with a table:

| Annual Pledge | Contributions YTD | Pay Periods Remaining | Pay Period Amount | Employee Contribution |
|---------------|-------------------|-----------------------|-------------------|-----------------------|
| (\$0.00 - | \$0.00) / | 16 = | \$0.00 = | \$0.00 Monthly |
- Plan Type 61 : Flex Spending Dependent Care**
 - Option Code: []
 - Annual Pledge: \$0.00
 - Employee Contribution Override: []

| | |
|-----|--|
| 41. | <p>Enter the employee’s annual pledge amount in the Annual Pledge field.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="border: 2px solid red; display: inline-block; padding: 2px;"> Annual Pledge <input type="text" value="\$0.00"/> </div> </div> <p>Employee Contribution Override <input type="text"/> Monthly</p> |
|-----|--|

| | |
|---|--|
|  | <p>If the employee provided a Pay Period amount vice an annual pledge amount, use the Contribution Worksheet section to calculate the annual pledge amount and then enter this calculated amount in the Annual Pledge field. To perform this, enter the Pay Period amount provided by the employee in the Pay Period Amount field and then click the Calculate button. The calculated amount will display in the Annual Pledge field (within the Contribution Worksheet section). Enter this amount in the Annual Pledge field.</p> |
|---|--|

| Step | Action |
|------|--------|
|------|--------|

42. Next, complete the **Plan Type 61: Flex Spending Dependent Care** section. Click the **Flex Spending Dependent Care Option Code Look Up** icon.

Plan Type 61 : Flex Spending Dependent Care


Option Code

Annual Pledge

Employee Contribution Override

▶ [Contribution Worksheet](#) ?

[Special Requirements](#)

 If Steps 42 - 43 are not completed, the system will automatically waive the Flex Spending Dependent Care plan for the employee as this is not a required plan.

The **Look Up Option Code** page displays in a pop-up window.

Look Up Option Code x

[Help](#)

Search Results

View 100 ◀ ◀ 1-2 of 2 ▶ ▶

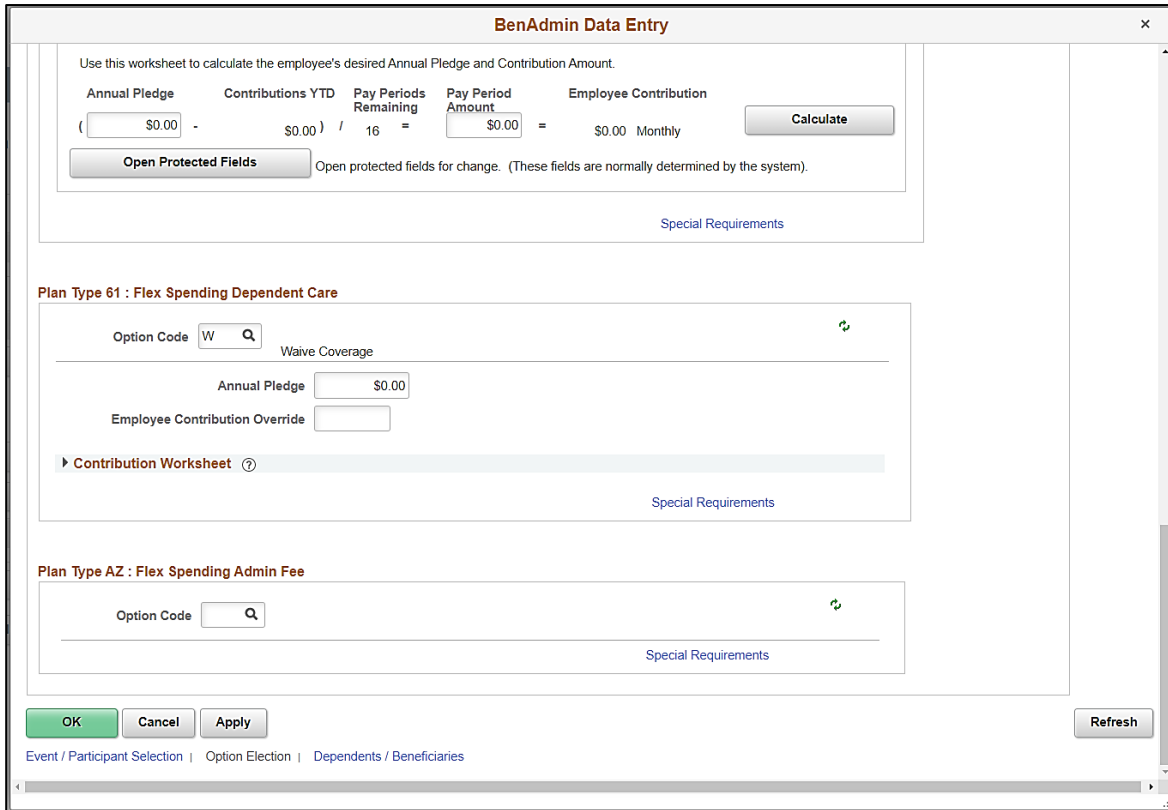
| Option Code | Option Type | Benefit Plan | Coverage Code |
|-------------|-------------|--------------|---------------|
| 1 | Option | FLXDCR | (blank) |
| W | Waive Optn | (blank) | (blank) |

43. Click the **Option Code W (Waive)** link.

| Option Code | Option Type | Benefit Plan | Coverage Code |
|-------------|-------------|--------------|---------------|
| 1 | Option | FLXDCR | (blank) |
| W | Waive Optn | (blank) | (blank) |

| Step | Action |
|------|--------|
|------|--------|

The **Option Election** tab redisplay.



BenAdmin Data Entry


Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

| Annual Pledge | Contributions YTD | Pay Periods Remaining | Pay Period Amount | Employee Contribution |
|---------------|-------------------|-----------------------|-------------------|-----------------------|
| (\$0.00 - | \$0.00) / | 16 = | \$0.00 = | \$0.00 Monthly |

Open protected fields for change. (These fields are normally determined by the system).


[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 

[Special Requirements](#)

[Event / Participant Selection](#) | [Option Election](#) | [Dependents / Beneficiaries](#)



If either a Flex Spending Medical plan or a Flex Spending Dependent Care plan was elected for the employee, the Flex Spending Admin Fee must be elected. Cardinal will provide an error if this is not completed. If neither of these plans was elected for the employee, the system will automatically waive the Flex Spending Admin Fee.

44.

Click the **Flex Spending Admin Fee Option Code Look Up** icon.



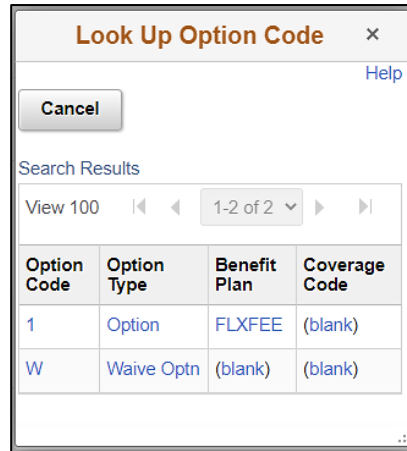
Plan Type AZ : Flex Spending Admin Fee

Option Code 

[Special Requirements](#)

| Step | Action |
|------|--------|
|------|--------|

The **Look Up Option Code** page displays in a pop-up window.



| 45. | <p>Click the Option Code 1 link.</p> <table border="1" data-bbox="256 907 1062 1108"> <thead> <tr> <th data-bbox="256 907 428 1020">Option Code</th> <th data-bbox="428 907 656 1020">Option Type</th> <th data-bbox="656 907 841 1020">Benefit Plan</th> <th data-bbox="841 907 1062 1020">Coverage Code</th> </tr> </thead> <tbody> <tr style="border: 2px solid red;"> <td data-bbox="256 1020 428 1108">1</td> <td data-bbox="428 1020 656 1108">Option</td> <td data-bbox="656 1020 841 1108">FLXFEE</td> <td data-bbox="841 1020 1062 1108">(blank)</td> </tr> <tr> <td data-bbox="256 1108 428 1129">W</td> <td data-bbox="428 1108 656 1129">Waive Optn</td> <td data-bbox="656 1108 841 1129">(blank)</td> <td data-bbox="841 1108 1062 1129">(blank)</td> </tr> </tbody> </table> | Option Code | Option Type | Benefit Plan | Coverage Code | 1 | Option | FLXFEE | (blank) | W | Waive Optn | (blank) | (blank) |
|-------------|--|--------------|---------------|--------------|---------------|---|--------|--------|---------|---|------------|---------|---------|
| Option Code | Option Type | Benefit Plan | Coverage Code | | | | | | | | | | |
| 1 | Option | FLXFEE | (blank) | | | | | | | | | | |
| W | Waive Optn | (blank) | (blank) | | | | | | | | | | |

| Step | Action |
|------|--------|
|------|--------|

The **Option Election** tab redisplay.

BenAdmin Data Entry x

Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

| | | | | | |
|---|-------------------|-----------------------|-------------------|-----------------------|--|
| Annual Pledge | Contributions YTD | Pay Periods Remaining | Pay Period Amount | Employee Contribution | |
| (<input type="text" value="\$0.00"/> - <input type="text" value="\$0.00"/>) / 16 = <input type="text" value="\$0.00"/> = \$0.00 Monthly | | | | | <input type="button" value="Calculate"/> |

Open protected fields for change. (These fields are normally determined by the system).

[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](#)

Event / Participant Selection | Option Election | Dependents / Beneficiaries

46. Once all elections have been made, click the **OK** button.

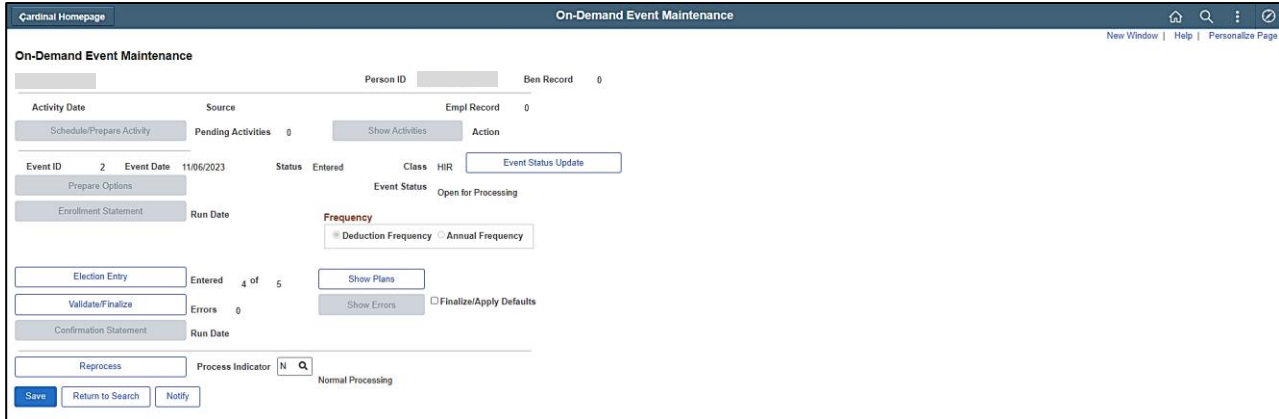
OK

Cancel

Apply

| Step | Action |
|------|--------|
|------|--------|

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



Cardinal Homepage On-Demand Event Maintenance

On-Demand Event Maintenance

Person ID [] Ben Record 0

Activity Date [] Source [] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 11/06/2023 Status Entered Class HIR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency
 Deduction Frequency Annual Frequency

Election Entry Entered 4 of 5 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

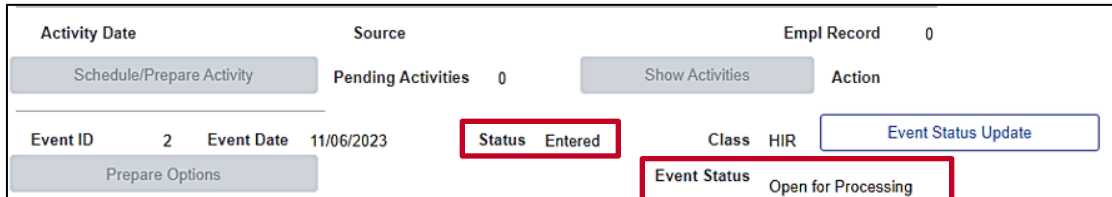
Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

Save Return to Search Notify



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



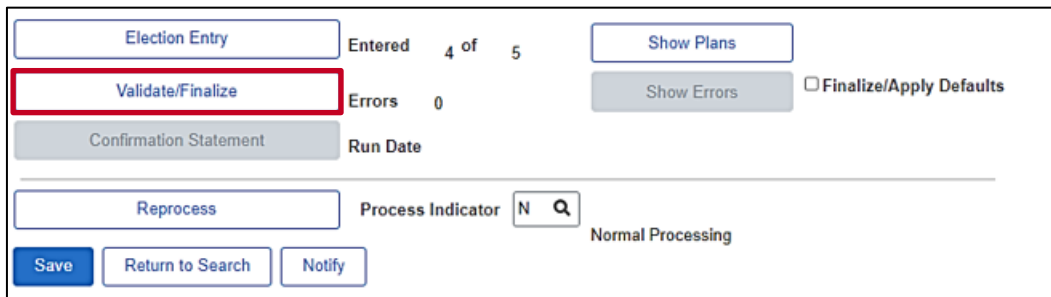
Activity Date [] Source [] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 11/06/2023 **Status Entered** Class HIR Event Status Update

Prepare Options **Event Status Open for Processing**

47. 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.




Election Entry Entered 4 of 5 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

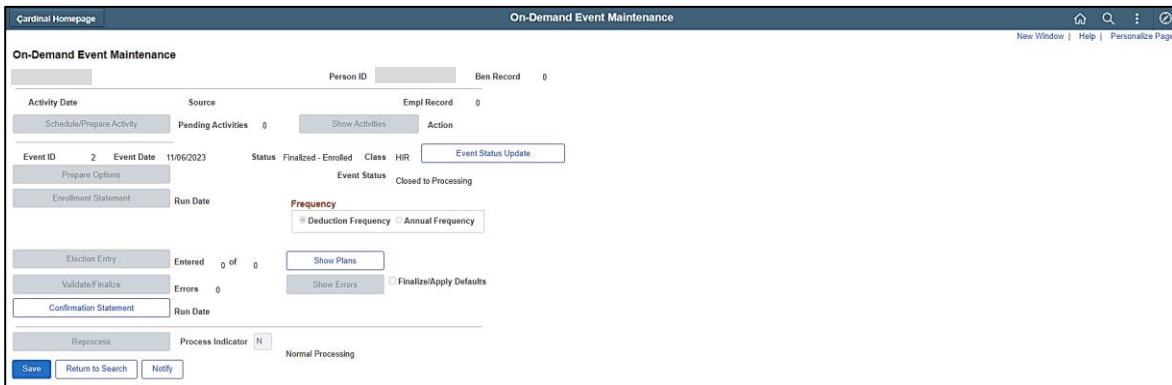
Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

Save Return to Search Notify

| Step | Action |
|------|---|
| 48. | <p>A Confirmation message displays in a pop-up window once the process completes. Click the OK button to close the message.</p>  |

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



Cardinal Homepage On-Demand Event Maintenance

Person ID [] Ben Record 0

Activity Date [] Source [] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 11/06/2023 Status Finalized - Enrolled Class HIR Event Status Update

Prepare Options

Enrollment Statement Run Date Event Status Closed to Processing

Frequency Deduction Frequency Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

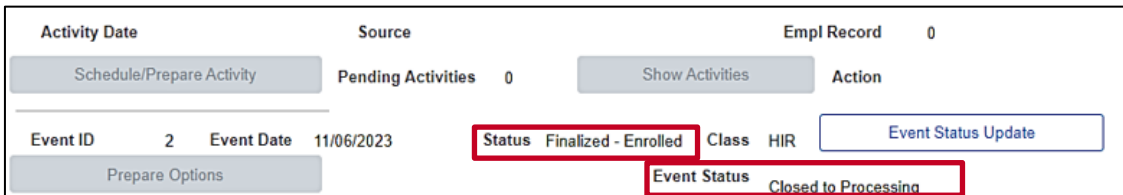
Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify



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




Activity Date [] Source [] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 11/06/2023 Status Finalized - Enrolled Class HIR Event Status Update

Prepare Options Event Status Closed to Processing

| | |
|-----|--|
| 49. | <p>Click the Save button.</p>  |
|-----|--|