

#### **Employee set up for Medicare Overview**

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take on the **Benefits Personal Data** page and the **ACA Employee Eligibility** Page before enrolling an employee in Medicare benefits.

# **Table of Contents**

Scenario 1: Employee turns 65 (with single coverage)	2
The Benefits Personal Data Page	2
The ACA Employee Eligibility Page	4
Process the Medicare Manual Event	7
Scenario 2: Employee turns 65 (with dependents covered)	17
The Benefits Personal Data Page	17
The ACA Employee Eligibility Page	19
Process the Medicare Manual Event	22
Hire the Spouse as an Employee	30
Scenario 3: Employee's dependent turns 65	46
Process the Medicare Manual Event	46
Hire the Spouse as an Employee	55
Enroll the Spouse in Medicare	71



### Scenario 1: Employee turns 65 (with single coverage)

In this scenario the employee has single coverage, turns 65 and is eligible for Medicare. The following actions taken by the BA are completed after the employee has been moved to a Job that reflects the Retiree status and has a Benefit Program of RET or a TLC program.

#### The Benefits Personal Data Page

Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

1. Access the **Benefits Personal Data** page using the following path:

#### Navigator > Benefits > Employee/Dependent Information > Benefits Personal Data

The **Benefits Personal Data Search** page displays.

Cardinal Homepage	Benefits Personal Data
Benefits Personal Data Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value	
<ul> <li>✓ Search Criteria</li> <li>Search by: Empl ID ✓ begins with  </li> <li>□ Include History</li> <li>Limit the number of results to (up to 300): 300</li> </ul>	
Search Advanced Search	

2. Enter the Employee ID in the **Empl ID** field.

**Note**: You can also search by entering the beginning of the Name, or other search criteria using the corresponding drop-down options. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Cardinal security restricts the user to seeing only their agency employees.

3. Click the **Search** button.



The **Benefits Personal Data** page refreshes with the employee's information.

Cardinal Homepage		Benefits Personal Data
Senetits Personal Data		
	Person ID	
Benefits Personal Data		
Highly Compensated Employe	٩	
*Highly Compensated Last Ye	nr Not Eligible for the Plan ✓	
Benefits Personal Data - Date Sensitive	Q    4 4 1 of 1 → ▶     \	/iew All
	+	
*Effective Date		
Medicare Number	Alternate Medicare Number	
Medicare A Indicator	Medicare Reason A	
□ Medicare B Indicator	Medicare Reason B	
□ Medicare D Indicator	Medicare Reason D	
	HIPAA Medicare Elig Reason	
Save Return to Search Previous in List	Next in List Notify Update/Display	Include History

- 4. Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field on the **Benefits Personal Data** page.
- 5. Check the boxes next to **Medicare A** and **Medicare B**.

**Note**: For End Stage Renal Failure, the Medicare A, B, and/or C check boxes will not be checked. OHB is establishing the record for End Stage Renal Failure (ESRD).

- 6. Select the corresponding **HIPAA Medicare Elig Reason**:
  - a. Age
  - b. Disability

**Note:** The Eligibility Reason of End Stage Renal is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary.

Note: The Medicare number will be populated by the Agency BA when received.

7. Click the **Save** button.

**Note:** Now navigate to the **ACA Employee Eligibility** page to complete the ACA status for the Medicare enrolled participants (follow steps below).



### The ACA Employee Eligibility Page

Before enrolling an employee in Medicare Benefits, the Agency BA must update the ACA Medicare Eligibility information for the employee.

1. Access the ACA Employee Eligibility page using the following path:

Navigator > Benefits > Employee/Dependent Information > ACA Employee Eligibility

The ACA Employee Eligibility Search page displays.

Cardinal Homepage		ACA Employee Eligibility
ACA Employee Eligibilit Enter any information you have an Find an Existing Value	y d click Search. Leave fields blank for a list of all values. Add a New Value	
▼ Search Criteria		
Empl ID	begins with V	
Affordable Care Act Common ID	begins with 👻 🔍	
Name	begins with 🖌	
Last Name	begins with V	
Second Last Name	begins with 🖌	
Alternate Character Name	begins with 🗸	
Middle Name	begins with v	
□ Include History □ Case Sen	sitive	
Limit the number of results to (up to	o 300): 300	
Search Clear Basic S	earch 📓 Save Search Criteria	

- 2. Enter the Employee ID in the **Empl ID** field.
- 3. Click on the **Search** button.



The ACA Employee Eligibility page displays with the employee's information.

Common ID UMW Universit	ty of Mary Washington	Employee ID	
		Q I	I I of 1 ∽ ► ► I View All
11/01/2019		Effective Sequence	0 + -
Always Eligible	~		Non-Assessment Period
0.000		Work Period	Monthly ~
Look Back	~	Measurement Period	
i		Evaluation End Date	
		Administration End Date	i i i i i i i i i i i i i i i i i i i
i		Stability End Date	
	Common ID UMW Universit	Common ID UMW University of Mary Washington	Employee ID Common ID UMW University of Mary Washington 11/01/2019 Effective Sequence Aways Eligible O.000 Look Back Measurement Period Evaluation End Date Administration End Date Stability End Date

4. Click on the "+" button to add a new row.

The ACA Employee Eligibility page refreshes with a new row.

Cardinal Homepage				ACA Employee Eligibilit	ty	
ACA Employee Elig	libility					
JOHN DOE A1	ffordable Care Act	Common ID UMW (	Iniversity of Mary Washingto	Employee ID		
Eligibility Information				QI	I	I View All
	*Effective Date	09/17/2021		Effective Sequence	0	+ -
*ACA	Eligibility Status	Always Eligible	¥		Non-Assessment Period	
Averag	ge Service Hours	0.000		Work rerioa	Monthly ~	
Evalı	uation Begin Date	Lоок васк	¥	Evaluation End Date		
Administr	ration Begin Date			Administration End Date		
Ste	ability Begin Date	<b>iii</b>		Stability End Date	i	
ACA Calculation Hours	3					
lli ⊂ Q					€ 1-1 of 1 ∨	
Employment	Company	scripti	mon	manna	monorman m	man



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CA Calculation Hou	rs		
<b>≣</b> , Q			
mpl Record	Company	Description	Total Hours
0 <b>Q</b>	٩		+ -
To	tal Eligibility Hours		
L	ast Update User ID BATCH		Updated on 06/04/2020 12:33:06PM
Save Return to	Search Notify		Add Update/Display Include History

- 5. The Effective Date will default to the current date. Change the **Effective Date** to be the top of the month in which the employee is being enrolled in Medicare.
- 6. Select **Excluded** from the drop-down menu next to **Eligibility Status**.
- 7. Click the **Save** button.



#### **Process the Medicare Manual Event**

To enroll the employee in Medicare, the Benefit Administrator (BA) must first add a **GEM** Manual Event through the **BAS** Activity page and then process the enrollment through the **On-Demand Event Maintenance** page.

1. Access the **BAS Activity** page using the following path:

Benefit Administrator tile > Manage Automated Enrollment > Review BAS Activity

The **Review BAS Activity** page displays.

Q								4	1-30 of 3719	~ )	н	View	00
DI ID+	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBR	Action		
	JOHN DOE	Address Change		0	0	08/06/2020	0	ADR	~			-	*
	JOHN DOE	Address Change		0	0	09/02/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	09/08/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/10/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~			-	
	JOHN DOE	Address Change		0	0	12/04/2020	0	ADR	~			-	Ŧ
m, q								4	1-30 of 3719	~ )	E FI	View	100

2. Click the **+ sign** to add row.



The **Review BAS Activity** page refreshes.

DI ID+	Name	<b>*Action Source</b>	All Jobs	Ben Record	Empl Record	*Event Date*	Event	*BAS Action*	Suppress	COBRA Action	
	JOHN DOE	Address Change		0	0	09/02/2020	0	ADR	~		
	JOHN DOE	Address Change		0	0	09/08/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/10/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-
-	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-
-	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-
-	JOHN DOE	Address Change		0	0	12/04/2020	0	ADR	~		-
	۹	Manual		0	0	Ē	d	٩	~	٩	

- 3. Enter the **Empl ID** in the first box to the left.
- 4. Enter the **Effective date** of the event in the date field.
- 5. Click on the magnifying class in the **BAS Action** section and select the **GEM** event (Gained Eligibility for Medicare).

The **BAS Activity** displays with the information in the new row.

	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	12/04/2020	0	ADR	~		-
Q		Manual Event	8	0	0	10/01/2021	0	GEM Q	· ·	٩	-

- 6. Click Save.
- 7. Navigate to the **On-Demand Event Maintenance** page.



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



- 8. Enter the **Empl ID**.
- 9. Click Search.

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

HN DOE					Person ID			Ben Record	0
Activity Dat	.e		Source			Emp	Record	0	
Schedul	e/Prepar	e Activity	Pending Activities	2	Show Activitie	es 📄	Action		
Event ID	0	Event Date		Status	Clas	5	Ev	ent Status Update	
Pre	pare Opt	ions			Event Statu	5			
Enroll	ment Sta	tement	Run Date		Frequency				
					Deduction Frequen	cy 🔿 Annu	al Frequen	cy	
El	ection E	itry	Entered 0 of	0	Show Plans	í.			
Val	idate/Fin	alize	Errors 0		Show Errors	🗆 Finali	ze/Apply De	afaults	
Confirm	nation SI	atement	Run Date						
	Reproces	4	Process Indicator	N					

10. Click on the **Show Activities** button.



The Show Activities page displays.

ASActivity						Persor	n ID		Ben Record
m, q						4 4	1-2 of 2 👻	- b - b)	
Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Acti	ion		
	0	Benefits Person	10/01/2021	0	MSC		+	-	
0	0	Manual Event	10/01/2021	0	GEM		+	-	

11. Select the **GEM** manual event from the **BAS Activity** table.

**Note:** The MSC listed in the BAS Activity table was created as a result of the Medicare information update completed on the **Benefit Personal Data** page.

12. Click OK.

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

HN DOE		Person ID	Ben Record 0
Activity Date 10/01/2021	Source Manual Event	E	mpl Record 0
Schedule/Prepare Activity	Pending Activities 2	Show Activities	Action GEM
vent ID 0 Event Date	Status	Class	Event Status Update
Prepare Options		Event Status	
Enrollment Statement	Run Date	Frequency	
		Deduction Frequency     A	nnual Frequency
Election Entry	Entered 0 of 0	Show Plans	
Validate/Finalize	Errors 0	Show Errors	alize/Apply Defaults
Confirmation Statement	Run Date		
Reprocess	Process Indicator N		

13. Click the Schedule/Prepare Activity button.



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

HN DOE		Person ID	Ben Record 0
Activity Date 10/01/2021	Source Benefits Person	Emp	Record 0
Schedule/Prepare Activity	Pending Activities 1	Show Activities	Action MSC
Event ID 1 Event Date	10/01/2021 Status P	repared Class GEM	Event Status Update
Prepare Options		Event Status Open f	or Processing
Enrollment Statement	Run Date	Frequency	
		Deduction Frequency O Ann	ual Frequency
Election Entry	Entered 0 of 1	Show Plans	
Validate/Finalize	Errors 0	Show Errors D Final	ize/Apply Defaults
Confirmation Statement	Run Date		
Reprocess	Process Indicator N Q	Normal Bracassian	
Save Return to Search	lotify	Normal Processing	

14. Click the **Election Entry** button.

**Note:** The GEM event is not available in Employee Self Service (ESS), so the BA needs to elect on behalf of the employee.

The **BenAdmin Data Entry** page displays.

			BenAdm	nin Data Entr	У		
vent / Particip	oant Selection O	ption Election Depende	ints / Beneficiaries				
Sched Event D	ID EM00 ata 10/01/2021 Gai	Empl ID n Eligibility Medicare/caid	JOHN DOE	Excess Cre	Ben Record ( dit Rollover To For	Event ID 1 feit Excess Credits	
vailable P	lans and Options 🔇	D					Q   1 of 1 v
n Type 10 :	Medical Option Code	COVA Cr+Exp Den	+Vision&Hmg (ACC4) (S	ingle)			0
	Health Provider I	0	Pr	eviously Seen	Special I	Requirements	
Jependent	s/Beneficiaries						
Dependen	ts/Beneficiaries						
	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
*ID	Name						
*ID	Name			0			-
*ID	Rame			-			-

15. Click on the magnifying glass to select a **Plan Type 10: Medical** plan.



The Look Up Option Code pop-up appears.



16. Select a Medical plan.

The BenAdmin Data Entry page returns.

			BenAdm	in Data Entr	У		
ent / Participar	nt Selection Optio	In Election	nts / Beneficiaries				
Sched ID Event Data	) EM00 E 3 10/01/2021 Gain E/	mpl ID ligibility Medicare/caid	JOHN DOE	Excess Cre	Ben Record 0 dit Rollover To For	Event ID 1 feit Excess Credits	
vailable Pla	ns and Options ⑦						Q   1 of 1 v
Type 10 : N	fedical						
c	Option Code 57	Advan65 + RX + De	en&Vision (65DV) (Sir	igle)			0
	Health Provider ID		D Pri	eviously Seen			
ependents/	Beneficiaries				Special	Requirements	
	Enroll All						
Dependents	/Beneficiaries						
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
				٥			-
٩							
Q +_							
Q +_							
Q +							
Q +_							

17. Click OK.



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

DHN DOE				Person ID			Ben Record	0
Activity Date	Source				Empl	Record	0	
Schedule/Prepare Activity	Pending Activities	1		Show Activities		Action MS	SC	
Event ID 1 Event Date	10/01/2021	Status	Entered	Class	GEM	Eve	nt Status Update	,
Prepare Options				Event Status	Open fo	or Processing	I.	
Enrollment Statement	Run Date		Freque	ncy				
			Dec	luction Frequency	OAnni	Jal Frequenc	ΣY	
Election Entry	Entered 1 of	1	SI	now Plans				
Validate/Finalize	Errors 0		St	ow Errors	🗆 Finali	ze/Apply Def	faults	
Confirmation Statement	Run Date							
#100001000	December 1 and a star							

#### 18. Click Validate/Finalize.

The On-Demand Event Maintenance page refreshes.

		Benefits Administrator
n-Demand Event Maintena	nce	
JOHN DOE		Person ID Ben Record 0
Activity Date	Source	Empl Record 0
Schedule/Prepare Activity	Pending Activities 1	Show Activities Action MSC
Event ID 2 Event Date	11/01/2021 Status	Finalized - Enrolled Class GEM Event Status Update
Prepare Options		Event Status Closed to Processing
Enrollment Statement	Run Date	Frequency
		Deduction Frequency     OAnnual Frequency
Election Entry	Entered 0 of 4	Show Plans
Validate/Finalize	Errors 0	Show Errors Grinalize/Apply Defaults
Confirmation Statement	Run Date	
Reprocess	Process Indicator N Q	
Save Return to Search	Notify	Normai Processing
mm	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	

- 19. Confirm the Status is Finalized-Enrolled, and the Event Status is Closed for Processing.
- 20. Click Schedule/Prepare Activity to now process the MSC event.



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

HN DOE			Person ID		Ben Record	0
Activity Date	Source			Empl Record	0	
Schedule/Prepare Activity	Pending Activities	0	Show Activities	Action		
Event ID 2 Event D	ate 10/01/2021	Status	Finalized - Prepared Class	MSC Eve	nt Status Update	
Prepare Options			Event Status	Closed to Processing	p	
Enrollment Statement	Run Date		Frequency		-	
			Deduction Frequency	Annual Frequenc	у	
Election Entry	Entered 0 of	0	Show Plans			
Validate/Finalize	Errors 0		Show Errors	Finalize/Apply Def	laults	
Confirmation Statement	Run Date					
Reprocess	Process Indicator	N				

21. The event processes automatically successfully.

**Note:** The **GEM** event is processed first so that in Cardinal an audit trail exists depicting the enrollment opportunity was due to Gain Eligibility for Medicare. While the MSC event will provide the same enrollment opportunities, the connection would be too "Miscellaneous" which does not depict the reason.

22. Click on the Event Status Update button to see statuses of the events.



#### The Update Event Status page displays.

	BenAdmin Even	t Status Updat	e	
Jpdate Event Status	101111 2025			Help
Empl ID	JOHN DOE	Ben	Record 0	
Event Status Update 💿			Q   (4 4   1 of 3 🛩   )   )	
Schedule ID	EM00		Address Eligibility Changed	
Event Date	10/01/2021 Event Disconnected		MultiJob Indicator Changed	
Event ID	1		Job Eligibility Changed	
Event Class	GEM Gain Eligibility Medicare/caid	L	Event Out of Sequence	
Event Priority	455		Finalize/Apply Defaults	
Benefit Program	RET	Print Option	Print Both Forms 🗸	
Process Status	Finalized - Enrolled	*Process	Normal Processing 🗸	
Action Source	Manual Event	"Event Status	Closed to Processing	
Schedule ID	EM00		Address Eligibility Changed	
Event Date	10/01/2021 Event Disconnected		MultiJob Indicator Changed	
Event ID	2		Job Eligibility Changed	
Event Class	MSC Misc Job Change		Event Out of Sequence	
Event Priority	400	120102-02	Finalize/Apply Defaults	
Benefit Program	RET	Print Option	Print Both Forms	
Process Status	Finalized - Prepared None	*Process	Normal Processing	
Action Source	Benefits Person	*Event Status	Closed to Processing 🗸	

**Note:** The **GEM** event is flagged with an event out of sequence because according to the Event Class order, the MSC event should have been processed first. However, the BA needs to process the **GEM** event first so that it is recorded that the employee gained eligibility for Medicare.

- 23. Click on the box next to Event Out of Sequence for the GEM event.
- 24. Click **OK.**



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

DHN DOE					Person ID			Ben Record	0
Activity Dat	6		Source			Empl	Record	0	
Schedul	e/Prepare Ac	ctivity	Pending Activities	0	Show Activitie	es	Action		
Event ID Pre	2 Ev	vent Date	-	Status	Clas Event Statu	5	Ev	ent Status Update	
Enroll	ment Statem	ient	Run Date		Frequency Deduction Frequen	cy 🖗 Anni	ual Frequen	cy	
El	ection Entry		Entered 0 of	0	Show Plans	i i			
Val	idate/Finalize	0	Errors 0		Show Errors	🗆 Finali	ze/Apply De	faults	
Confirm	nation Stater	ment	Run Date						
	Reprocess		Process Indicator	N					

25. Click Save.



### Scenario 2: Employee turns 65 (with dependents covered)

In this scenario, the employee has employee + spouse coverage, the employee turns 65 and is eligible for Medicare, however the Spouse is not eligible for Medicare. The following actions taken by the BA are completed after the employee has been moved to a Job that reflects the Retiree status and has a Benefit Program of RET or a TLC program.

Note: If the employee turns 65 with family coverage, hire the youngest dependent as an employee.

### The Benefits Personal Data Page

Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

1. Access the **Benefits Personal Data** page using the following path:

#### Navigator > Benefits > Employee/Dependent Information > Benefits Personal Data

The Benefits Personal Data Search page displays.

Cardinal Homepage	Benefits Personal Data
Benefits Personal Data Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value	
<ul> <li>✓ Search Criteria</li> <li>Search by: Empl ID  → begins with </li> <li>Include History</li> <li>Link the surpless of equation to 200 x 200</li> </ul>	
Search Advanced Search	

2. Enter the Employee ID in the Empl ID field.

**Note**: You can also search by entering the beginning of the Name, or other search criteria using the corresponding drop-down options. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Cardinal security restricts the user to seeing only their agency employees.

3. Click the **Search** button.



The **Benefits Personal Data** page refreshes with the employee's information.

Cardinal Homepage	Benefits Personal Data
Renefite Revenuel Rete	
Benefits Personal Data	
Person ID	
Benefits Personal Data	
Highly Compensated Employee	
*Highly Compensated Last Year Not Eligible for the Plan	
*Effective Date	+ -
Medicare Number Alternate Medicare Number	
Medicare A Indicator     Medicare Reason A	
Medicare B Indicator     Medicare Reason B	
Medicare D Indicator     Medicare Reason D	
HIPAA Medicare Elig Reason	
Save Return to Search Previous in List Next in List Notify	Jpdate/Display Include History

- 4. Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field on the **Benefits Personal Data** page.
- 5. Check the boxes next to **Medicare A** and **Medicare B**.

**Note**: For End Stage Renal Failure, the Medicare A, B, and/or C check boxes will not be checked. OHB is establishing the record for End Stage Renal Failure (ESRD).

- 6. Select the corresponding **HIPAA Medicare Elig Reason**:
  - a. Age
  - b. Disability

**Note:** The Eligibility Reason of End Stage Renal is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary.

Note: The Medicare number will be populated by the Agency BA when received.

7. Click the **Save** button.

**Note:** Now navigate to the **ACA Employee Eligibility** page to complete the ACA status for the Medicare enrolled participants (follow steps below).



### The ACA Employee Eligibility Page

Before enrolling an employee in Medicare Benefits, the Agency BA must update the **ACA Medicare Eligibility** information for the employee.

1. Access the ACA Employee Eligibility page using the following path:

Navigator > Benefits > Employee/Dependent Information > ACA Employee Eligibility

The ACA Employee Eligibility Search page displays.

Cardinal Homepage		ACA Employee Eligibility
ACA Employee Eligibility Enter any information you have and Find an Existing Value	y j click Search. Leave fields blank for a list of all values. Add a New Value	
▼Search Criteria		
Empl ID Affordable Care Act Common ID	begins with v A	
Name	begins with V	
Last Name	begins with 👻	
Second Last Name	begins with 🗸	
Alternate Character Name	begins with 🗸	
Middle Name	begins with 🖌	
□ Include History □ Case Sens	sitive	
Limit the number of results to (up to	o 300): 300	
Search Clear Basic S	earch   ಔ <sup>₽</sup> Save Search Criteria	

- 2. Enter the Employee ID in the **Empl ID** field.
- 3. Click on the **Search** button.



The ACA Employee Eligibility page displays with the employee's information.

▶   View All
+ -
• • •

4. Click on the "+" button to add a new row.

The ACA Employee Eligibility page refreshes with a new row.

<ul> <li>Cardinal Homepage</li> </ul>				ACA Employee Eligibilit	y .
ACA Employee Eligi	bility				
JOHN DOE Aff	ordable Care Act	Common ID UMW Ur	iversity of Mary Washington	Employee ID	
Eligibility Information				Q I	I I of 2 ✓ ► ► I View All
	*Effective Date			Effective Sequence	• •
*ACA F	Eligibility Status	Always Eligible	~		Non-Assessment Period
Averag	je Service Hours	0.000		Work Period	Monthly ~
Cal	culation Method	Look Back	~	Measurement Period	
Evalua	ation Begin Date	<b>iii</b>		Evaluation End Date	iii
Administra	ation Begin Date	<b></b>		Administration End Date	<b>.</b>
Stat	bility Begin Date	iii		Stability End Date	i
ACA Calculation Hours					
ling Q					
Emr	Componie	scriptim	m	montest	many many



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CA Calculation Hour	s			
B) Q				
Empl Record	Company	Description		Total Hours
0 <b>Q</b>	٩			+ -
Tot	al Eligibility Hours ast Update User ID BATCH		Updated on 06	3/04/2020 12:33:06PM
Return to S	Search Notify			Add Update/Display Include History

- 5. The Effective Date will default to the current date. Change the **Effective Date** to be the top of the month in which the employee is being enrolled in Medicare.
- 6. Select **Excluded** from the drop-down menu next to **Eligibility Status**.
- 7. Click the **Save** button.



#### **Process the Medicare Manual Event**

To enroll the employee in Medicare, the Benefit Administrator (BA) must first add a GEM Manual Event through the BAS Activity page and then process the enrollment through the On-Demand Event Maintenance page. Before adding the manual event for the employee, the Agency BA must confirm that the employee has a spouse listed in their current benefit enrollment.

the Liestile Demofit means by using the followin 1.

Name			Health Benefits
Health Benefits			
Enter any information you have a	d click Search. Leave fields bl	ank for a list of all values.	
Find an Existing Value			
- Search Criteria			
Empl ID	egins with 🗸		
Benefit Record Number	: •	I	
Name	egins with v		
Last Name	egins with v		
Business Unit	regins with v		
Department Set ID	regins with v	Q	
Department	egins with v	Q	
Organizational Relationship	• •	~	
Alternate Character Name	egins with 🖌		

2. Enter the Empl ID.

Clear Basic Search 🖉 Save Search Criteria

3. Click Search.

Search



# **Benefits Job Aid**

# **BN361 Employee Set Up for Medicare**

#### The Health Benefit page refreshes.

					Health Benefits			
	1 401 13 80	io modicar						
overage	e				Q	I I4	• • •	View All
	*Coverage Begin Date D	7/01/2020 📰 🦕	*Deduction Begin	n Date 0	7/01/2020 📰 🥠			+ -
overag	e Election							
Ele	ct O Waive	🔿 Terminate 🔧	*Election	n Date	7/20/2021			
	Benefit Program Benefit Pla Coverage Cod Health Provider ID Employee Statu	Action	ut-of-ntwk+Vs&Hr	Optic	n Code 46			
epende	Enroll All Dependents				6			
epende III)	Enroll All Dependents				k₂		1-1 of 1	×
epende III D	Enroll All Dependents nt/Beneficiaries Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Fig	1-1 of 1	~
epende ID D1 Q	Enroll All Dependents nt/Beneficiaries Name Doe,Edith	Relationship to Employee Spouse	Health Provider ID	Prev Seen	Covered Person Type Spouse	Age Limit Flg N	1-1 of 1	~
epende ID 01 Q +	Enroll All Dependents nt/Beneficiaries Name Doe,Edith	Relationship to Employee Spouse	Health Provider ID	Prev Seen	Covered Person Type Spouse	Age Limit Flg N	1-1 of 1	Y

**Note:** Here the Agency BA can see that the employee currently has a Self + Spouse medical coverage with their Spouse covered under the current medical plan.

4. Navigate to the **BAS Activity** page to add the manual event for the employee using the following path:

#### Benefit Administrator tile > Manage Automated Enrollment > Review BAS Activity

#### The Review BAS Activity page displays.

Q									1-30 of 3719	✓ ▶ ▶	View 100
DI ID+	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action	
	JOHN DOE	Address Change		0	0	08/06/2020	0	ADR	~		- ^
	JOHN DOE	Address Change		0	0	09/02/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	09/08/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/10/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR			-
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-
	JOHN DOE	Address Change		0	0	12/04/2020	0	ADR	~		
m, q								4	1-30 of 3719	-	View 100



# **Benefits Job Aid**

# **BN361 Employee Set Up for Medicare**

5. Click the **+ sign** to add row.

The **Review BAS Activity** page refreshes.

q								14	4 1-30 of 372	) <b>~</b> F F	View 100
np <mark>i ID</mark> ≜	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action	
	JOHN DOE	Address Change		0	0	09/02/2020	c	ADR	-		
	JOHN DOE	Address Change		0	0	09/08/2020	C	ADR	~		-
	JOHN DOE	Address Change		0	0	11/10/2020	C	ADR	-		-
	JOHN DOE	Address Change		0	0	11/20/2020	C	ADR	~		-
-	JOHN DOE	Address Change		0	0	11/20/2020	C	ADR	-		-
	JOHN DOE	Address Change		0	0	11/20/2020	c	ADR	-		-
	JOHN DOE	Address Change		0	0	11/23/2020	c	ADR	-		-
	JOHN DOE	Address Change		0	0	11/23/2020	C	ADR	-		-
	JOHN DOE	Address Change		0	0	11/23/2020	C	ADR	-		-
	JOHN DOE	Address Change		0	0	11/23/2020	c	ADR	-		-
	JOHN DOE	Address Change		0	0	12/01/2020	c	ADR	-		-
	JOHN DOE	Address Change		0	0	12/01/2020	c	ADR	-		-
	JOHN DOE	Address Change		0	0	12/01/2020	c	ADR	-		-
-	JOHN DOE	Address Change		0	0	12/04/2020	C	ADR	-		-
٩		Manual		0	0	<b></b>		٩		Q	

- 6. Enter the **Empl ID** in the first box to the left.
- 7. Enter the **Effective date** of the event in the date field (Same date as the Medicare Information Update).
- 8. Click on the magnifying class in the **BAS Action** section and select the **GEM** event (Gained Eligibility for Medicare).

The **BAS Activity** displays with the information in the new row.

www.		Inh Data	m	hum	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	and ment	m	- marken	~ Wm	m	-
the summer of	JOHN DOE	Change		0	0	10/01/2020	0	HIR	<b></b>		_
	JOHN DOE	Job Data Change		0	1	11/04/2021	0	XFR	~		-
A	Nelson Smith01	Job Data Change		0	0	11/01/2021	0	HIR	<b></b>		-
10 - 10 - 10 - 10 - 10 - 10 - 10 - 10 -	Nelson Smith02	Job Data Change		0	0	11/01/2021	0	HIR	<b>_</b>		-
٩		Manual Event	0	1	1	11/01/2021	0	gem Q	<b>~</b>	Q	-
+ 🛱 Q									14 4 1-28 of	28 🗸 🕨 🕅	View All
Save Notify	Refresh										

**Note:** The Agency BA needs to confirm the Manual Event is being added to the correct employee and benefit record number.

- 9. Click Save.
- 10. Navigate to the **On-Demand Event Maintenance** page by using the following path:

Homepage > Benefit Administrator tile > Benefit Management > On-Demand Event Maintenance page



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



- 11. Enter the **Empl ID**.
- 12. Click Search.

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

N DOE		Person ID	Ben Record 1
ctivity Date 11/01/2021	Source Manual Event	E	mpl Record 1
Schedule/Prepare Activity	Pending Activities 1	Show Activities	Action GEM
ent ID 0 Event Date	Status	Class	Event Status Update
Prepare Options		Event Status	
Enrollment Statement	Run Date	Frequency	
		Deduction Frequency O A	Innual Frequency
Election Entry	Entered 0 of 0	Show Plans	
Validate/Finalize	Errors 0	Show Errors	nalize/Apply Defaults
Confirmation Statement	Run Date		
Banraasa	Process Indicator N		



13. Click the Schedule/Prepare Activity button.

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

Activity Date	Source			Emp	ol Record 0		
Schedule/Prepare Activity	Pending Activities	0	Show Activit	es	Action		
Event ID 1 Event Date	11/01/2021	Status	Prepared Clas	s GEM	Event	Status Update	
Prepare Options			Event State	IS Open	for Processing		
Enrollment Statement	Run Date		Frequency			_	
			Deduction Frequence	ncy O Anr	ual Frequency		
Election Entry	Entered 0 of	1	Show Plans	]			
Validate/Finalize	Errors 0		Show Errors	O Fina	lize/Apply Defau	lts	
Confirmation Statement	Run Date						
			-			-	

14. Click the **Election Entry** button.

**Note:** The GEM event is not available in Employee Self Service (ESS), so the BA needs to elect on behalf of the employee.

The **BenAdmin Data Entry** page displays.

			BenAdr	nin Data Enti	У		
ent / Particip	pant Selection Option	ion Election Depende	nts / Beneficiaries				
Sched Event Da	I ID EM00 lata 11/01/2021 Gain F	Empl ID Eligibility Medicare/caid	JOHN DOE	Excess Cre	Ben Record for the set of the set	Event ID 1 feit Excess Credits	
vailable P	flans and Options ③						Q   1 of 1 ~
Type 10 :	: Medical						
1	Option Code	۹					φ
	Health Provider ID	La:	O P	reviously Seen			
					Special I	Requirements	
ependent	S/Beneficiaries	7					
Dependen	te/Beneficiaries						
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
	_						-
٥	2						

15. Click on the magnifying glass to select a **Plan Type 10: Medical** plan.



The Look Up Option Code pop-up appears.

	B	enAdmin	Data Er	try		
vent / Participant Selection Option Election	Dependents / Beneficiar	ies				
Sched ID EM00 Empl ID Event Data 11/01/2021 Gain Eligibility Medic	JOHN DOE		Excess (	Ben Re redit Rollove	cord 1 Event ID 1 er To Forfeit Excess Credits	
Available Plans and Options ⑦	L	ook Up Op	otion Co	ode ×		Q   1 of 1 ~
an Type 10 : Medical	Cance	ł		Help	F	
Option Code	Search R View 10	esults D 14 4	1-5 of 5	· • •		0
Health Provider ID	Option Code	Option Type	Benefit Plan	Coverage Code	Special Requirements	
Dependents/Beneficiaries	104	Option	MODV	1		
Enroll All	57	Option	65DV	1		
Dependents/Beneficiaries	97	Option	A65	1		
*ID Name Relati Emplo	onship to W	Waive Optn	(blank)	(blank)	/pe Age Limit Flag	
Q			U		0	-
+						

16. Select a **Medical** plan.

The BenAdmin Data Entry page returns.

Sched ID Event Data	EM00 E 11/01/2021 Gain E	mpl ID						
		ligibility Medicare/caid	JOHN DOE	Excess Cre	Ben Record dit Rollover To	1 Event ID 1 Forfeit Excess Credits		
		igionity inconcercicate						
vailable Plans	and Options ⑦						Q   1 of 1 ~	
n Type 10 : Me	dical							
Op	tion Code 57 C	Advan65 + RX + De	n&Vision (65DV) (Single	)			¢	
	Health Provider ID		O Pr	eviously Seen				
			]		Speci	al Requirements		
)ependents/Be	eneficiaries							
E	inroll All							
Dependents/E	Beneficiaries							
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		
٩							-	
+								
ОК Са	ancel Apply							Refr
/ Participant Sele	ection   Option Elec	tion   Dependents / Benel	iciaries					

17. Click **OK.** 



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

Activity Date	Source				Emp	Record	0	
Schedule/Prepare Activity	Pending Activities	0		Show Activities		Action		
Event ID 1 Event I	Date 11/01/2021	Status	Entered	Class	GEM	Eve	ent Status Update	
Prepare Options				Event Status	Open f	or Processin	g	
Enrollment Statement	Run Date		Freque	ncy				
			Dec	luction Frequency	○ Ann	ual Frequen	ісу	
Election Entry	Entered 1 of	1	SH	ow Plans				
Validate/Finalize	Errors 0		Sh	ow Errors	🗆 Final	ize/Apply De	efaults	
Confirmation Statement	Run Date							
Reprocess	Process Indicator	N Q	Normal Pr	ocessing				
Cause Detume to Consult	Descious in List	La constana da di		ocessing				

#### 18. Click Validate/Finalize.

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

DHN DOE		Person ID		Ben Record 1
Activity Date	Source		Empl Record	0
Schedule/Prepare Activity	Pending Activities 0	Show Activities	Action	
Event ID 1 Event Date	11/01/2021 Status	Finalized - Enrolled Class	GEM Even	t Status Update
Prepare Options		Event Status	Closed to Processing	
Enrollment Statement	Run Date	Frequency		•
		Deduction Frequency	✓ Annual Frequency	(
Election Entry	Entered 0 of 0	Show Plans		
Validate/Finalize	Errors 0	Show Errors	Finalize/Apply Defa	ults
Confirmation Statement	Run Date			
Reprocess	Process Indicator N	Normal Processing		
Save Return to Search F	Previous in List Next in L	ist Notify		

- 19. Confirm the Status is Finalized-Enrolled, and the Event Status is Closed for Processing.
- 20. Navigate to the **Health Benefits** page to confirm the updated medical plan enrollment for the employee by using the following path:

#### Navigator > Benefits > Enroll in Benefits > Health Benefits



The Health Benefits search page displays.

Find an Existing Value		
Search Criteria		
Empl ID	begins with 🗸	
Benefit Record Number	= ~	
Name	begins with 🗸	
Last Name	begins with 🗸	
Business Unit	begins with 🖌	
Department Set ID	begins with 🗸	Q
Department	begins with 🗸	Q
Organizational Relationship	= •	~
Alternate Character Name	begins with 🗸	
Include History Correc	t History Case Sensitiv	9

- 21. Enter the Empl ID.
- 22. Click Search.

The Health Benefits page displays.

On-Demand Event Maintenance	He	alth Benefits
alth Benefits	B ID Benefit Record Number 1	
an iype		Q I I I I I I I I VIEW A
Plan Type	10 Medical	+ -
Coverage		Q    4 4 1 of 1 ~  >  >    View All
*Coverage Begin Date	101/2021 🛗 🦡 *Deduction Begin Date 11/01/2021 🗄	₿ <sub>∿</sub> + -
● Elect ○ Waive	⊖ Terminate 🤨 *Election Date 11/23/2021 🗒	
Benefit Progra Benefit Pl Coverage Co Health Provider ID	RET         Option Code         57           66DV         Q         Advan65 + RX + Den&Vision         Option Code         57           1         Q         Single         Previously Seen         1	
Employee Stat	s Active 😡	
Employee Stat Enroll All Dependents Dependent/Beneficiaries	s Active	11/1 -

Note: Now the Agency BA can see that the employee has **Single** medical benefit plan coverage.



#### Hire the Spouse as an Employee

Before hiring the spouse as an employee, the Agency BA must gather the personal information (e.g., Social Security number, date of birth, etc.) from the **Update Dependent/Beneficiary** page. Once the information is gathered, then the Agency BA can complete the hire process.

1. Navigate to the **Update Dependent/Beneficiary** page using the following path: **Benefit Administrator tile > Employee/Dependent Information > Update Dependent/Beneficiary** 

 Update Dependent/Beneficiary

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

 Find an Existing Value

 Search Criteria

 Empl ID
 begins with •

 Name
 begins with •

 Last Name
 begins with •

 Second Last Name
 begins with •

 Middle Name
 begins with •

 Middle Name
 begins with •

 Include History
 Correct History
 Case Sensitive

 Limit the number of results to (up to 300):
 300

 Search
 Clear
 Basic Search

The Update Dependent/Beneficiary search page displays.

2. Enter the **Empl ID** of the employee.

The **Dependent/Beneficiary** page will display.

Name Address Personal Profile	
IN DOE	Person ID
pendent/Beneficiaries	Q    4 4 1 of 1 -  -  -  -  - View All
"Dependent/Beneficiary ID 01	+ -
Name History	Q    4 4 1 of 1 ->  >  >  -  View All
Effective Date 07/01/2020	+ -
Format Type English	
Display Name Edith Doe	View Name
ave Return to Search Notify	Update/Display Include History Correct History

3. Click on the **Personal Profile** tab.



#### The Personal Profile tab displays.

lealth Benefit Elections		Update Dependent/Beneficiary
ame Address Personal Prof	ile	
OHN DOE		Person ID
rsonal Profile		Q I II II II I I I I ViewAll
Dependent/Beneficiary ID 0	1 Edith Doe	+ -
Date of Birth 0	1/01/1969	Birth Location
Birth Country	٩	Birth State Q
Date of Death	iii	Riders/Orders exist
Medicare Entitled Date	<b></b>	Riders/Orders
Personal History		Q I II II I I I I I View All
*Effective Date 07/01	/2020 🛗	+ -
*Relationship to Employee Spou	se	~
*Dependent Beneficiary Type Appr	oved Dependent	✓
*Gender Fema	ale	✓
*Marital Status Marr	ed	✓ As of 07/01/2020 III
□ St	udent	As of iii
	sabled	As of

- 4. Write down the dependent's **Date of Birth** and the **Social Security** number. In addition, write down the **Empl ID** of the Employee for future use.
- Navigate to the Add a Person page to hire the dependent into Cardinal using the following path:
   Navigator > Workforce Administration > Personal Information > Biographical > Add a Person

The Add a Person page displays.

	Add a Person	,
Add a Person		>
Person ID	NEW	
	Add Person	>
h		1

6. Click on **Add Person** button.



The Modify a Person page displays.

Add a Person		Modify a Person
Biographical Details Contact Infor	rmation <u>R</u> egional <u>O</u> rganizational Relationships VA Pe	rson Info
	Person ID NEW	
Name	Q    4 4 1 of 1 v b b	View All
*Effective Date 11/23/202	21	+ -
*Format Type English		
Display Name	Add Name	
Biographic Information		
Date of Birth	Years 0 Months 0	
Birth Country USA	Q United States	
Birth State	C Exclude Contact Information	on?
Biographical History	Q I I 10f1 V V	I View All
*Effective Date 11/23/20	021	+ -
"Gender Unknow	wn 🗸	
*Highest Education Level Not Ind	licated ~	
*Marital Status Unknov	As of E	

- 7. Change the **Effective Date** to the day the dependent is Medicare eligible.
- 8. Click on Add Name button.

The Name page displays.

		Name	×
ame	QIK	English Name Format	Help
*Effective Date 11/01/2021		Name Prefix 💙	
-Format Type English V	_	*First Name	
Display Name		Middle Name	
ographic Information		"Last Name	
Date of Birth	Years 0	Name Suffix	
Birth Country USA Q	United States	Display Name	
Birth State Q		Formal Name	
Birth Location		Name	
Biographical History	QIR	OK Cancel Refresh Name	

- 9. Add the dependent's name information.
- 10. Click **OK.**



#### The Modify a Person page returns.

Add a Person		Modify a Person
Biographical Details Cor	tact Information Regional Organizational Relationships VA Person Info	
Edith Doe	Person ID NEW	
Name	Q    4 4 1 of 1 v  >  >    View All	
*Effective Date *Format Type Display Name	11/01/2021 III English V Edith Doe	
Biographic Information Date of Birth	T 🛄 Years 0 Months 0	
Birth Country Birth State	USA Q United States	
Birth Location	Exclude Contact Information?	
Biographical History	Q I Id d Iof1 > > > I ViewAll	
*Effective Date	11/01/2021 <b>***</b>	
*Highest Education Level	Not Indicated	
*Marital Status	Unknown · As of ·	A month and

- 11. Enter the Date of Birth.
- 12. Select a Gender.
- 13. At the bottom of the page, enter the **Social Security** number.
- 14. Click on the **Contact Information** tab.



#### The Contact Information tab displays.

Add a Perso	on					Modify a Pers
<u>B</u> iographical D	Details	Contact Information	Regional	Organizational Relationships	VA Person Info	
lith Doe					Empl ID NEW	
III Q	5565	2			I	View All
ddress Type	As Of Date	e Status	Address			
ome	11/01/2021	A			Add Address Detail	+ -
none Informa	ation					
<b>≕</b> , Q				H	4 1-1 of 1 🗸 🕨	View All
hone Type		Telephone		Extension	Preferred	
		•			0	+ -
ail Option §	Selection					
Age	ency Provide	d Email OPer	nding Agency Pro	ovided Email O Employ	vee Provided Email	
nail Address	ses					
Email Type		*Email Addres	s		Preferred	

15. Click on the Add Address Detail hyperlink.

The Address History page displays.

Add a Person			Modify a Person
ddress History			
Address Type Home			
Address History		Q    4 4 1 of 1 ~ >	
*Effective Date 111/01/2021	Address	+ -	
*Status A Q		13	
Add Address			
OK Cancel Refresh	m ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~ ~		m

16. Click on **Add Address** hyperlink.



#### The Edit Address page displays.

Add a Person		Modify a Person	<
Edit Address			3
Country	United States		
Address 1			
Address 2			{
Address 3			-
City	State Q		
Postal			
County			1
ок	Cancel		2
$\sim$	Man Marthan Ma	men man	~

- 17. Enter the dependent's **address**.
- 18. Click **OK.**

The Address History page displays.

ess History				
Address Type Home				
ress History		Q   H 4	1 of 1 🗸 🕨 🕨	
*Effective Date 11/01/2021 Country USA	Addres	s 1 Main Street Glen Allen, VA 23059 Hanover	+ -	
*Status A	٩			
Add Address				

19. Click **OK.** 



#### The **Contact Information** tab displays.

Contact l	nformation						Modi	ify a Pe	rson
Biographica	al Details C	ontact Information	Regional	Organizational Relationsh	ips	VA Person Info			
Edith Doe						Empl ID NEW			
III Q	Iresses				14	4 1-1 of 1 🗸		View A	All
Address Type	As Of Date	Status	Address						
Home	11/01/2021	A	1 Main Street Glen Allen, VA 2305 Hanover	59	Edit/Vi	iew Address Detail	+	-	
hone Infor	mation				DI	11011	N	Mour All	
*Phone Type	•	Telephone		Extension	14	Preferred	PI, I	view All	
		•					+	-	
mail Optio	n Selection Agency Provided	l Email O	Pending Agency Prov	ided Email O Em	ployee F	Provided Email			
Email Addre	esses	*Email Add	Iress			Preferred			
		~					+		
~~~~		man	$\sim$			mann	man		m

- 20. Enter the Phone Number information.
- 21. Enter the **Email** information.
- 22. Click on the VA Person Info tab.

#### The VA Person Info tab displays.

Contact Information	Modify a Person
Biographical Details Contact Information Rev	jional Organizational Relationships VA Person Info
Edith Doe	Person ID NEW
Power Of Attorney	Linked Participant EmplID
Preferred Pronoun	Preferred Gender
Save Notify Refresh	Add Update/Display Include History Correct History
Biographical Details   Contact Information   Regional	Organizational Relationships   VA Person Info

- 23. Input the Employee's Empl ID in the Linked Participant EmplID field.
- 24. Click on the **Organization Relationship** tab.


The Organizational Relationship tab displays.

Contact Information	Modify a Person
Biographical Details         Contact Information         Regional         Organizational Relationships         VA Person Info	
Edith Doe Person ID NEW	
Choose Org Relationship to Add  Employee Contingent Worker Person of Interest	
Select Checklist Code	
Save Notify Refresh Add Update/Display Include History Correct	History
Biographical Details   Contact Information   Regional   Organizational Relationships   VA Person Info	

- 25. Check the box next to **Employee.**
- 26. Select **Hire** from the drop-down menu next to **Select Checklist Code**.
- 27. Click Add Relationship button.

The Work Location tab displays.

Siographical Details			Modify a Person
Work Location Job Inform	ation Job Labor	Payroll Salary Plan Compensation	n
Edith Doe Employee		Empl ID Empl Record 0	
Work Location Details ⑦	D		Q    4 4 1of1 v  > >>
"Effective Date Effective Sequence HR Status Payroll Status	11/01/2021	*Action Hir Reason *Job Indicator Pri nd Dates	Go To Row + -
Position Number	٩		Current
Position Entry Date	Override Position	n Data	
*Regulatory Region	USA Q	United States	
*Company	Q		
*Business Unit	15100 <b>Q</b>	Department of Accounts	
*Department	٩		
Department Entry Date			
	~ Marin	man and the second	man man man man

- 28. Select Hire-VRSRT use only from the drop-down menu next to Reason.
- 29. Enter the **Position Number** for **VRS Retiree Position**.
- 30. Click on the Job Information tab.



# **Benefits Job Aid**

## **BN361 Employee Set Up for Medicare**

#### The Job Information tab displays.

Biographical Details						Modify a P	erson
Work Location Job Informat	ion Job Labor	<u>P</u> ayroll	Salary Plan	ompensation			
dith Doe mployee		Em	Empl ID pl Record 0				
Job Information Details ⑦						Q	< 1 of 1 → → →
Effective Date	11/01/2021						Go To Row
Effective Sequence	0			Action	Hire		
HR Status	Active			Reason	Hire-VRSRT use	e only	
Payroll Status	Active			Job Indicator	Primary Job		Current
Job Code	COVHBO		Health Benefits On	у			
Entry Date	11/01/2021			SO	C Code		
Supervisor Leve	E	1	Employee	Superviso	r Name		
Reports To							
Regular/Temporary	Regular		Full	Part Full-Time			
Empl Class	45	~	*Officer 0	ode None	`	•	
Regular Shift	Not Applicable		Shift	Rate			
Classified Inc	Classified		Shift Fa	ctor			
Standard Hours ⑦							
Standard Hour	s 40.00						

- 31. Select VRSRetiree from the drop-down menu next to Empl Class.
- 32. Click on the **Payroll** tab.

The **Payroll** tab displays.

Work Location	on Job Labor	Payroll	Salary Plan	Compensation		
dith Doe mployee		Er	Empl ID 0	8188691200		
Payroll Information ⑦					Q	I I I I I I I I I I I I I I I I I I I
Effective Date	11/01/2021					Go To Row
Effective Sequence	0			Action	Hire	
HR Status	Active			Reason	Hire-VRSRT use only	
Payroll Status	Active			Job Indicator	Primary Job	Current
*Payroll System	Payroll for North Ame	rica 🗸				
Absence System	Other	~				
Payroll for North America ⑦						
Pay Group	Q					
Employee Type	a			Holiday	Schedule	Q
Tax Location Code	Q					
GL Pay Type					Exempt	~
Combination Code				FIG	Edit ChartFiel	ds

- 33. Select the MNP (Non-Payroll) Pay Group.
- 34. Input the corresponding **Tax Location code**.



#### The **Compensation** tab displays.

Effective		21				Go To Row
	Sequence 0			Action Hire		
	HR Status Active			Reason Hire-VRS	RT use only	
Pay	roll Status Active			Job Indicator Primary J	ob	o
Compe	isation Rate	0.0000002		*Frequ	uency M Q Mo	nthly
comparative Informa	tion ⑦					
Pay Rates ⑦						
Defeult Deu Com						
Default Pay Comp	onents					
Default Pay Comp	onents					
Components ⑦	ponents					
Components ⑦	ponents				14 -	1-1 of 1 🗸 🕨 🕨
Components ⑦ Components ⑦ Control	Changes	Conversion III			id - 4	1-1 of 1 v
Components ⑦ ! Q Amounts <u>Control</u> *Rate Code	s Changes Co	Conversion II>	Currency	Frequency	Percent	( 1-1 of 1 • • •
Components ⑦ Q Amounts Control *Rate Code Q	S Changes	Conversion   > mp Rate	Currency	Prequency Q	Percent	( 1.1 of 1 ∨ ) > >
Components ⑦ Components ⑦ Components ⑦ Control Contro Control Control Control Control Control Control Control	Seq Co	Corversion II> omp Rate	Currency	Frequency       Q	Percent Q.	<ul> <li>1.1 of 1 • • •</li> <li>• •</li> </ul>
Components ⑦ Components ⑦ Control Control Calculate Compe	s Changes Chan	Cgnversion II▶ mp Rate	Currency	Q Frequency	Q	1.1 of 1 ▼ ▶ ▶
Components ⑦ Amounts Control *Rate Code Calculate Compe	s Changes Co Seq Co sation	Conversion II> IIP Rate	Currency	Frequency       Q.	Q _	1.1 of 1 ▼ ▶ ▶

- 35. Change the **Frequency** to **M**.
- 36. Click on the **Default Pay Components** button.
- 37. Enter "0" in the Com Rate field.
- 38. Click on the Calculate Compensation button.
- 39. Click on the **Benefit Program Participation** hyperlink.

The Benefit Program Participation page displays.

Biographical Details				Modify a Person
Benefit Program Participation				
lith Doe ployee		Empl ID Empl Record	0	
enefit Status ③				Q            1 of 1 ~
Benefit Record Number	0			Go To Row
Effective Date	44/04/2024			
Effective Sequence	0	Action	Hire	
HR Status	Active	Reason	Hire-VRSRT use only	
Payroll Status	Active	Job Indicator	Primary Job	(ma)
*Benefits System	Benefits Administration	~	Benefit	Current Status
Annual Benefits Base Rate		JUSD	ACA Eligibility Deta	Is
Benefits Administration Eligibility	0			
BAS Group ID	٩			
Elig Fld 1	Q	Elig Fld 2	٩	Elig Fld 3 Q
Elig Fld 4		Elig Fld 5		Elig Fld 6
Elig Fld 7		Elig Fld 8	Q	Elig Fld 9 Q



- 40. Enter Elig Fid 2 (e.g., 005001000).
- 41. Enter Elig Fld 8 (e.g., 12-12).
- 42. Enter Elig Fld 9 (e.g., LS-GB).
- 43. Scroll down to the bottom of the page.

The **Benefit Program Participation** bottom of the page displays.

nefit Program P	articipation Details ⑦		Q     I of 1 ~   I View All	
*B	*Effective Date 11/01/2021	Currency Code USD	+ -	
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation	

- 44. Change the **Benefit Program** to **RET**.
- 45. Click OK.
- 46. Click **OK** through any warning messages that pop-up.

The Organization Relationships page returns.

< Organizational Relationships	Modify a Person
Biographical Details Contact Information Regional Organizational Relationships VA Person Info	
Edith Doe Person ID	
Choose Org Relationship to Add	
Employee	
Contingent Worker	
Person of Interest	
Empl Record 0	
Select Checklist Code Hire 🗸 🛞	
Add Relationship	
Save Notify Refresh Add Update/Display Include History Correct Hi	story
ographical Details   Contact Information   Regional   Organizational Relationships   VA Person Info	

- 47. The dependent now has an Employee ID. Write down the **Person ID** (Empl ID) for future use.
- 48. Navigate to the Modify a Person page using the following path:
   Navigator > Workforce Administration > Personal Information > Biographical > Modify a Person



The Personal Data search page displays.

< Name	Personal Data
Personal Data	
Find an Existing Value Add a New Value	ii values.
Search Criteria	
Empl ID begins with v	
Name begins with 🗸	
Last Name begins with 👻	
Second Last Name begins with 🗸	
Alternate Character Name begins with 🗸	
Middle Name begins with 💙	
Include History     Correct History     Case Sensitive	
Limit the number of results to (up to 300): 300	
Search Clear Desis Search C Save Search Criteria	
Dasic Scarch W Save Search Uniteria	
Find an Existing Value   Add a New Value	

- 49. Enter the Employee Empl ID. (Recorded on Step 50)
- 50. Click Search.

The **Modify a Person** page displays.

🗘 Name			Modify a Person
Biographical Details	ntact Information Regio	VA Person Info	
JOHN DOE		Person ID	
Name		Q I II II II View All	
Effective Date Format Type Display Name	06/22/2021 English JOHN DOE	+ -	
Biographic Information			
Date of Birth	11/16/1956	Years 65 Months 0	
Date of Death			
Birth Country	USA Q	United States	
Birth State Birth Location	۹	Exclude Contact Information?	
Biographical History		Q    4 4 1 of 1 •  •  •  •  • View All	
*Effective Date	06/22/2021	+ -	
*Gender	Female 🗸		
*Highest Education Level	Not Indicated	~	
"Marital Status	Unknown	As of 06/22/2021	

51. Click on the **VA Person Info** tab.



#### The VA Person Info tab displays.

< Name		Modify a Person
Biographical Details	gional VA Person Info	
JOHN DOE	Person ID	
Power Of Attorney	Linked Participant EmplID	
Preferred Pronoun	Preferred Gender	
Save Return to Search Notify Re	sh Add Update/Display Include History	Correct History
graphical Details   Contact Information   Regional	VA Person Info	

- 52. Enter the **Dependent's Empl ID** in the **Linked Participant EmplID** field.
- 53. Click Save.
- 54. Navigate to the **On-Demand Event Maintenance** page to process the dependent's new hire benefit event by using the following path:

Benefit Administrator tile > Managed Automated Enrollment > On-Demand Event Maintenance

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

dith Doe		Person ID	Ben Record 0
Activity Date	Source	Em	pl Record 0
Schedule/Prepare Activity	Pending Activities 0	Show Activities	Action
Event ID 1 Event Date	11/01/2021 Status	Prepared Class HIR	Event Status Update
Prepare Options		Event Status Open	for Processing
Enrollment Statement	Run Date	Frequency	
		Deduction Frequency      An	nual Frequency
Election Entry	Entered 0 of 1	Show Plans	
Validate/Finalize	Errors 0	Show Errors	lize/Apply Defaults
Confirmation Statement	Run Date		
Reprocess	Process Indicator N	2	

55. Since the Benefit Administration Process has run in Cardinal from the time of hire, the event is already **prepared**. Click on the **Election Entry** button to make the benefit elections for the dependent.



The BenAdmin Data Entry page displays.

			DellAu	nin Data Enti	У		
nt / Participa	nt Selection 0	ption Election	dents / Beneficiaries				
Sched I Event Dat	D EM00 a 11/01/2021 Init	Empl ID ial Enrollment	Edith Doe	Excess Cre	Ben Record dit Rollover To Fo	0 Event ID 1 rfeit Excess Credits	
ailable Pla	ans and Options	3					Q   1 of 1 ~
Type 10 : I	Medical						
<u>Г</u>	Option Code	۹					¢
	Option Code		OF	reviously Seen			ç
	Option Code	Q k D	C F	reviously Seen	Special	Requirements	¢
ependents	Option Code	a 18 10		reviously Seen	Special	Requirements	°
ependents	Option Code   Health Provider   /Beneficiaries Enroll All			reviously Seen	Special	Requirements	•
ependents Dependent TD	Option Code   Health Provider   /Beneficiaries Enroll All s/Beneficiaries Name	Relationship to	Health Provider	reviously Seen Previously Seen	Special Covered Person Type	Requirements Age Limit Flag	
ependents Dependent ND	Option Code [ Health Provider   /Beneficiaries s/Beneficiaries s/Beneficiaries Name	Relationship to	Health Provider ID	Previously Seen	Special Covered Person Type	Requirements Age Limit Flag	

56. Click on the magnifying glass next to Option Code for Plan Type 10: Medical.

The Look Up Option Code pop-up appears.

			L	ook Up	Option C	ode ×			
vent / Participa	nt Selection Option	Election Depende	Cance			Help -			
Sched II Event Dat	D EM00 En a 11/01/2021 Initial En	npl ID rollment	Ed Search Re View 100	esults	1-49 of 49	• • •	0 Event ID 1 Forfeit Excess Credits		
	10 11 0		Option Code	Option Type	Benefit Plan	Coverage Code		0	
Available Pla	ins and Options @		1	Option	CHA	1		Q   10/1 V	
in Type 10 - M	Vedical		10	Option	CHA2	2			
		4	11	Option	CHA2	3		<i>c</i> .	
(	12	Option	CHA2	4		-			
	Health Provider ID		13	Option	CHD	1			
			14	Option	CHD	2	ecial Requirements		
Dependents	Reneficiaries		15	Option	CHD	з 🗟			
	Encell All		16	Option	CHD	4			
	Enroli Ali		17	Option	CHD1	1			
Dependents	s/Beneficiaries		18	Option	CHD1	2	S		
1D	Name	Relationship to	19	Option	CHD1	3	Age Limit Flag		
		Employee	2	Option	CHA	2			
Q			20	Option	CHD1	4			
+			25	Option	ACC0	1			
			26	Option	ACC0	2			
			27	Option	ACC0	3			
			28	Option	ACC0	4			

57. Select a benefit plan with a **Coverage Code 1** for single coverage.

The BenAdmin Data Entry page refreshes.



			BenAdm	nin Data Entr	У			
Sched ID E Event Data 1	M00 Emp I/01/2021 Initial Enro	l ID liment	Edith Doe	Excess Cre	Ben Record ( dit Rollover To For	) Event ID 1 feit Excess Credits		
Available Plans a	nd Options ⑦						Q   1 of 1 ~	
an Type 10 : Medio	al							
Optio	n Code 45 Q	COVA+ExDen+Out	of-ntwk+Vs&Hr (ACC5)	(Single)			Ŷ	
He	alth Provider ID		0 Pr	eviously Seen				
Dependents/Ren	ficiariae				Special F	Requirements		
Enro	bii Ali							
Dependents/Ber	eficiaries							
*ID Na	me	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		
٩				D			-	
+								
OK Canc	el Apply							Refre

58. Click **OK.** 

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

dith Doe				Person ID	-		Ben Record	0
Activity Date	Source				Emp	ol Record	0	
Schedule/Prepare Activity	Pending Activities	0		Show Activities	;	Action		
Event ID 1 Event Da	te 11/01/2021	Status	Entered	Class	HIR	Ev	ent Status Update	)
Prepare Options				Event Status	Open	for Processin	g	
Enrollment Statement	Run Date		Frequence	cy				
			Deduce	ction Frequenc	y O Anr	nual Frequen	ю	
Election Entry	Entered 1 of	1	Show	w Plans				
Validate/Finalize	Errors 0		Show	w Errors	🗆 Final	lize/Apply De	efaults	
Confirmation Statement	Run Date							
Reprocess	Process Indicator	N Q	Normal Proc					
Save Return to Search	Notify		Normar Fro	Lessing				
Neturn to Search	Nony							

59. Click Validate/Finalize button.



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

Edith Doe			Person ID	Ben Record 0
Activity Date	Source		Empl Record	0
Schedule/Prepare Activi	ty Pending Activities	0	Show Activities Action	
Event ID 1 Even	t Date 11/01/2021	Status	Finalized - Enrolled Class HIR	nt Status Update
Prepare Options			Event Status Closed to Processin	g
Enrollment Statement	Run Date		Frequency Ocduction Frequency      Annual Frequence	су
Election Entry	Entered 0 of	0	Show Plans	
Validate/Finalize	Errors 0		Show Errors Finalize/Apply De	faults
Confirmation Statemer	t Run Date			
Reprocess	Process Indicator	N	Normal Processing	
Save Return to Search	Notify		Komarrecessing	

**Note:** The employee is now enrolled in Medicare, the spouse has been hired into Cardinal, linked to the employee, and enrolled in single coverage medical.



### Scenario 3: Employee's dependent turns 65

In this scenario, the employee has employee + spouse coverage, the employee is not eligible for Medicare, but the Spouse turns 65 and is eligible for Medicare. Once the BA confirms that the spouse is eligible for Medicare, the BA must add a **GEM** event to change the employee's coverage from Employee + Spouse to Single.

### **Process the Medicare Manual Event**

1. Access the **BAS Activity** page using the following path:

### Benefit Administrator tile > Manage Automated Enrollment > Review BAS Activity

The Review BAS Activity page displays.

AS Activity			_						Conjune and Con		-	
m, q								I 4	1-30 of 3719	~ >	▶    View 10	00
Empl ID+	Name	Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action *	Suppress Forms	COBRA Act	ion	
	JOHN DOE	Address Change		0	0	08/06/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	09/02/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	09/08/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	11/10/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-	l
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR	~		-	
	JOHN DOE	Address Change		0	0	12/04/2020	0	ADR	-		-	1
- m q								4	1-30 of 3719	~ >	I View 10	00

2. Click the **+ sign** to add row.



The Review BAS Activity page refreshes.

AS Activity												
m, Q								14	4 1-30 of 372	0 🗸 🕨 🕨	View 1	00
Empl ID*	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action		
	JOHN DOE	Address Change			o c	09/02/2020	c	ADR	-		-	•
	JOHN DOE	Address Change			0 0	09/08/2020	0	ADR	•		-	
-	JOHN DOE	Address Change			0 0	11/10/2020	(	ADR	~		-	
	JOHN DOE	Address Change			0 0	11/20/2020	(	ADR	~		-	
-	JOHN DOE	Address Change			0 0	11/20/2020	(	ADR	-		-	
-	JOHN DOE	Address Change			o c	11/20/2020		ADR	-		-	
-	JOHN DOE	Address Change			o c	11/23/2020	(	ADR	-		-	
-	JOHN DOE	Address Change			o c	11/23/2020	0	ADR	-		-	l
-	JOHN DOE	Address Change			0 0	11/23/2020	(	ADR	-		-	
-	JOHN DOE	Address Change			0 0	11/23/2020	(	ADR	-		-	
	JOHN DOE	Address Change			o c	12/01/2020	c	ADR	-		-	
	JOHN DOE	Address Change			0 0	12/01/2020	(	ADR	-		-	
-	JOHN DOE	Address Change			o c	12/01/2020	0	ADR	-		-	
	JOHN DOE	Address Change			0 0	12/04/2020	(	ADR	-		-	
c	L.	Manual		0	0	Ē		Q	~	٩	-	Į

- 3. Enter the **Empl ID** in the first box to the left.
- 4. Enter the **Effective date** of the event in the date field (Same date as the Medicare Information Update).
- 5. Click on the magnifying class in the **BAS Action** section and select the **GEM** event (Gained Eligibility for Medicare).

The **BAS Activity** displays with the information in the new row.

HN DOE	Unange Job Data Change									
OHN DOE	Job Data Change									
OHN DOE			0	0	10/21/2021	0	TER	~	TER	-
	Job Data Change		0	0	10/08/2021	0	RFL	~		E
OHN DOE	Job Data Change		0	0	10/01/2021	0	LOA	~		-
OHN DOE	Job Data Change		0	0	10/25/2021	0	JOB	~		
OHN DOE	Job Data Change		0	0	10/22/2021	0	HIR	~		E
OHN DOE	Address Change		0	0	10/25/2021	0	ADR	~		
OHN DOE	Job Data Change		0	0	12/30/2020	0	JOB	~		-
OHN DOE	Job Data Change		0	0	10/27/2021	0	HIR	~		-
OHN DOE	Job Data Change		0	0	12/15/2020	0	XFO	~	TER	
OHN DOE	Job Data Change		0	0	12/01/2020	0	JOB	~		
OHN DOE	Job Data Change		0	0	10/01/2020	0	HIR	~		-
OHN DOE	Job Data Change		0	1	11/04/2021	0	XFR	~		
OHN DOE	Manual Event		0	0	11/01/2021	0	GEM Q	~	٩	-
							3		4 of 24 🗸 🕨 🕨	Vie
	HN DOE HN DOE HN DOE HN DOE HN DOE HN DOE HN DOE HN DOE HN DOE	HN DOE     Job Data Change       HN DOE     Job Data Change       HN DOE     Address Change       HN DOE     Job Data Change       HN DOE     Job Data Change	Integration     Job Data Change     Image       HN DOE     Job Data Change     Image       HN DOE     Address Change     Image       HN DOE     Job Data Change     Image       HN DOE     Job Data Cha	HN DOE         Job Data Change         Image         Image           HN DOE         Job Data Change         Image         Image         Image           HN DOE         Job Data Change         Image         Image         Image         Image           HN DOE         Address         Image         Image <t< td=""><td>NDOE         Job Data Change         Image         Image</td><td>NDOE         Job Data Change         Image         Image</td><td>Interpretation         Interpretation         Interpr</td><td>Non-         Job Data Change         Image         <thimage< th=""> <thimage< th=""></thimage<></thimage<></td><td>None         Job Data Change         Image         <thimage< th=""> <thimage< th=""></thimage<></thimage<></td><td>HN DOE       Job Data       Image: Change       &lt;</td></t<>	NDOE         Job Data Change         Image         Image	NDOE         Job Data Change         Image         Image	Interpretation         Interpr	Non-         Job Data Change         Image         Image <thimage< th=""> <thimage< th=""></thimage<></thimage<>	None         Job Data Change         Image         Image <thimage< th=""> <thimage< th=""></thimage<></thimage<>	HN DOE       Job Data       Image: Change       <



- 6. Click Save.
- 7. Navigate to the **On-Demand Event Maintenance** page using the following path:

Benefit Administrator tile > Manage Automated Enrollment > On-Demand Event Maintenance

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

Keview BAS Activity			On-Demand Event Maintenance
On-Demand Event Maintenand	e		
JOHN DOE		Person ID	Ben Record 0
Activity Date 11/01/2021	Source Manual Event	Empl	Record 0
Schedule/Prepare Activity	Pending Activities 1	Show Activities	Action GEM
Event ID 0 Event Date	Status	Class	Event Status Update
Prepare Options		Event Status	
Enrollment Statement	Run Date	Frequency	
		Deduction Frequency O Annu	al Frequency
Election Entry	Entered <sub>0</sub> of <sub>0</sub>	Show Plans	
Validate/Finalize	Errors 0	Show Errors Finaliz	e/Apply Defaults
Confirmation Statement	Run Date		
Reprocess	Process Indicator N	Normal Processing	
Save Return to Search No	tify		

8. Click on the Schedule/Prepare Activity button.



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

JOHN DOE			Person ID			Ben Record	0
Activity Date	Source			En	npl Record	0	
Schedule/Prepare Activity	Pending Activities	0	Show Act	ivities	Action		
Event ID 1 Event Date	11/01/2021	Status	Prepared	Class GEM	Ever	nt Status Update	
Prepare Options			Event S	itatus Oper	n for Processing		
Enrollment Statement	Run Date		Frequency				
			Deduction Freq	luency ⊖Ar	nnual Frequenc	У	
Election Entry	Entered		Show Plans				
Validate/Finalize	Frors 0	4	Show Errors	Fin	alize/Apply Def	aults	
Confirmation Statement	Run Date						
Reprocess	Process Indicator	N Q	Narmal Processing				
Save Return to Search N	otify		Normal Processing				

9. Click on the **Election Entry** button.

The **BenAdmin Data Entry** page displays.

			BenAdn	nin Data Entr	У			
ent / Participan	nt Selection Opti	ion Election	nts / Beneficiaries					
Sched ID Event Data	D EM00 11/01/2021 Gain I	Empl ID Eligibility Medicare/caid	JOHN DOE	Excess Cre	Ben Record ( dit Rollover To For	) Event ID 1 feit Excess Credits		
Available Plar	ns and Options ⑦						Q   1 of 4 ¥	
n Type 10 : M	ledical		n Den&Vis (CHA1) (Seli	(+ Spouse)			ę	
	Health Provider ID		. P	reviously Seen 🎝	Special I	Requirements		
Dependents/E	Beneficiaries	1						
Dependents/E	Beneficiaries Enroll All /Beneficiaries							
Dependents/E	Beneficiaries Enroll All /Beneficiaries Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		
Dependents/E	Enroll All /Beneficiaries Name Jessica Doe	Relationship to Employee Spouse	Health Provider ID	Previously Seen	Covered Person Type Spouse	Age Limit Flag		
Dependents/	Enroll All //Beneficiaries Name Jessica Doe	Relationship to Employee Spouse	Health Provider ID	Previously Seen	Covered Person Type Spouse	Age Limit Flag		
Dependents/b	Enroll All //Beneficiaries Name Jessica Doe	Relationship to Employee Spouse	Health Provider ID	Previously Seen	Covered Person Type Spouse	Age Limit Flag		

10. Click on the magnifying glass under **Plan Type 10: Medical**.

# **Benefits Job Aid**



## **BN361 Employee Set Up for Medicare**

			L	ook Up	Option C	ode ×		
<u>E</u> vent / Participant	Selection Op	tion Election	ents Cancel			Help		H
Sched ID Event Data	EM00 11/01/2021 Gain	Empl ID Eligibility Medicare/caid	JO View 100	esults	1-49 of 49	• » »I	d 0 Event ID 1 o Forfeit Excess Credits	
Augulahia Dian	a and Ontions (2)		Option Code	Option Type	Benefit Plan	Coverage Code	0 1 1444	
Available Plan	s and Options @	/	1	Option	CHA	1	Q 1 1074 V	
lan Type 10 · Me	edical		10	Option	CHA2	2		
ian type to . in			11	Option	CHA2	3	C.	
Oj	ption Code 6	COVA HithAwr + E	кр [ 12	Option	CHA2	4	r i i i i i i i i i i i i i i i i i i i	
	Health Provider ID	)	13	Option	CHD	1		
			14	Option	CHD	2	pecial Requirements	
Dependents/B	leneficiaries		15	Option	CHD	3		
			16	Option	CHD	4		
	Enroll All		17	Option	CHD1	1		
Dependents/	Beneficiaries		18	Option	CHD1	2		
*ID	Name	Relationship to	19	Option	CHD1	3	Age Limit Flag	
		Linployee	2	Option	CHA	2		
01 Q	Jessica Doe	Spouse	20	Option	CHD1	4		
+			25	Option	ACC0	1		
			26	Option	ACC0	2		
			27	Option	ACC0	3		
			28	Option	ACC0	4		
			29	Option	ACC1	1	-	

11. Click on the Medical Plan with **Coverage Code 1** (Single).

The BenAdmin Data Entry page returns.

		BenAdr	nin Data Enti	У			
ent / Participant Selection Op	tion Election	ents / Beneficiaries					
Sched ID EM00 Event Data 11/01/2021 Gain	Empl ID Eligibility Medicare/caid	JOHN DOE	Excess Cre	Ben Record dit Rollover To Fo	D Event ID 1 feit Excess Credits		
vailable Plans and Options ⑦	)					Q   1 of 4	~
Type 10 : Medical							
Option Code 5	Q COVA HithAwr + Ex	op Den&Vis (CHA1) (Sin	gle)			¢	
Health Provider ID			reviously Seen			ß	
				Special	Requirements		
ependents/Beneficiaries				Special	Requirements		
ependents/Beneficiaries Enroll All Dependents/Beneficiaries				Special	Requirements		
ependents/Beneficiaries Enroll All Dependents/Beneficiaries	Relationship to Employee	Health Provider ID	Previously Seen	Special Covered Person Type	Requirements Age Limit Flag		
ependents/Beneficiaries Enroll All Dependents/Beneficiaries "ID Name 01 Q Jessica Doe	Relationship to Employee Spouse	Health Provider ID	Previously Seen	Special Covered Person Type Spouse	Age Limit Flag		



**Note:** Before removing the listed dependent, make sure to record all the personal information for the new hire process. (e.g., Date of Birth, Full Name, Address, etc.)

12. Click on the " - "sign next to the listed dependent under the Dependent/Beneficiaries.

			BenAdn	nin Data Enti	У			
vent / Participa	ant Selection Option	Election Depende	ents / Beneficiaries					
Sched I Event Da	ID EM00 En ta 11/01/2021 Gain Eliç	npl ID gibility Medicare/caid	JOHN DOE	Excess Cre	Ben Record ( dit Rollover To For	) Event ID 1 feit Excess Credits		
Available Pla	ans and Options ⑦						Q   1 of 4 🛩	
n Type 10 :	Medical							
	Option Code 5 Q	]	D 015 (0114 (170)	1.5			9	
	Health Provider ID		cica rono nom ano pago					
Dependents	s/Beneficiaries	-	OK	Cance		_		
Dependents Dependent	s/Beneficiaries Enroll All ts/Beneficiaries	_	Сок	Cance				
Dependents Dependent	s/Beneficiaries Enroll All ts/Beneficiaries Name	Relationship to Employee	Health Provider	Previously Seen	Covered Person Type	Age Limit Flag		
Dependents Dependent *ID 01 Q	s/Beneficiaries Enroll All ts/Beneficiaries Name Jessica Doe	Relationship to Employee Spouse	Health Provider ID	Previously Seen	Covered Person Type Spouse	Age Limit Flag	-	
Dependents Dependent 1D 01 Q +	s/Beneficiaries Enroll All ts/Beneficiaries Name Jessica Doe	Relationship to Employee Spouse	Health Provider	Previously Seen	Covered Person Type Spouse	Age Limit Flag		
Dependents Dependent <sup>1</sup> ID 01 Q ±.	s/Beneficiaries Enroll All ts/Beneficiaries Name Jessica Doe	Relationship to Employee Spouse	Health Provider ID	Previously Seen	Covered Person Type Spouse	Age Limit Flag		

13. Click **Ok.** 



The BenAdmin Data Entry page returns with no listed dependents under Dependents/Beneficiaries.

			BenAdn	nin Data Entr	У		
vent / Participa	ant Selection Option I	Election Depende	nts / Beneficiaries				
Sched I Event Dat	ID EM00 Emp ta 11/01/2021 Gain Eligii	pl ID bility Medicare/caid	JOHN DOE	Excess Cre	Ben Record ( dit Rollover To For	) Event ID 1 feit Excess Credits	
Available Pla	ans and Options ⑦						Q   1 of 4 ~
an Type 10 : I	Medical						
	Option Code 5 Q	COVA HithAwr + Ex	p Den&Vis (CHA1) (Sin	gle)			ry -
	Health Provider ID		0 P	reviously Seen			
Dependents	/Beneficiaries				Special I	Requirements	
	Enroll All						
Dependent	s/Beneficiaries						
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
٩							-
+	[⋧						

14. Scroll down to the bottom of the page and click OK.

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

JOHN DOE			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	11/01/2021	Status En	tered Class	GEM Eve	nt Status Update	
Prepare Options			Event Status	Open for Processing		
Enrollment Statement	Run Date		Frequency			
			Deduction Frequence	y O Annual Frequenc	зy	
Election Entry	Entored of	ſ	Show Plans			
Validate/Finalize	Errors 0	4	Show Errors	Finalize/Apply Def	aults	
Confirmation Statement	Run Date					
Reprocess	Process Indicator	N Q	lormal Processing			
Save Return to Search N	otify					

15. Click on the Validate/Finalize button.



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

						-
Activity Date	Source			Empl	Record	)
Schedule/Prepare Activity	Pending Activities	0	Show Activities		Action	
vent ID 1 Event Date	11/01/2021	Status	Finalized - Enrolled Class	GEM	Event	Status Update
Prepare Options			Event Status	Closed t	o Processing	
Enrollment Statement	Run Date		Frequency			
			Deduction Frequency	Annu	al Frequency	
Election Entry	Entered <sub>0</sub> of	0	Show Plans			
Validate/Finalize	Errors 0		Show Errors	Finaliz	e/Apply Defau	ılts
Confirmation Statement	Run Date					
Reprocess	Process Indicator	N				_
ave Return to Search No	tify		Normal Processing			

16. Navigate to the **Health Benefits** page to confirm the current benefit enrollment for the employee by using the following path:

Navigator > Enroll in Benefits > Health Benefits



The Health Benefits search page displays.

Find an Existing Value			
Search Criteria	1		
Empl ID	begins with 🗸		
Benefit Record Number	= •		
Name	begins with 🗸		
Last Name	begins with 🗸		
Business Unit	begins with 🗸		
Department Set ID	begins with 🗸		Q
Department	begins with 🗸		Q
rganizational Relationship	= •		~
Alternate Character Name	begins with 🗸		
Include History Correct	t History 🗆 Case	Sensitive	

17. Enter the **Employee ID**.

The Health Benefits page displays.

		Health Benefits
alth Benefits	ee ID Benefit Record Nur	mber 0
an Type		Q    4 4 1 of 1 * 1 View A
Plan Type	10 Medical	+ -
Coverage	La .	Q I II 1 1 1 1 1 View All
Coverage Election	Terminate	v2021 ⊞
	m SalBenPrgm	
Benefit Progr Benefit P Coverage Co	de 1 Q, Single Option Cc	ode 5
Benefit Progra Benefit P Coverage C4 Health Provider ID	de 1 Q Single Previously Seen	ode 5
Benefit Progr Benefit P Coverage Cr Health Provider ID Employee Sta Enroll All Dependents	de 1 COMA Little Aur & Gran DenšVis Option Cc de 1 Q Single Previously Seen us Active	ode 5

18. Confirm the **Benefit Plans Coverage Code** is **Single.** 



### Hire the Spouse as an Employee

Now that the employee's benefit election has been updated to Single, the Agency BA must now hire the Spouse as an employee into Cardinal.

1. Navigate to the Add a Person page through the following path:

#### Navigator > Workforce Administration > Personal Information > Add Person

✓ Health Benefit Elections	Add a Person
Add a Person	\$
Person ID NEW Add Person Search for Matching Persons	
1 man marken and and and and and and and and and an	man from a start f

2. Click on Add Person button.



### The Modify a Person page displays.

Add a Person					Modify a Person
Biographical Details	ntact Information Regi	onal <u>O</u> rgan	izational Relationships	VA Person Info	
			Person II	) NEW	
lame		Q I	<ul> <li><li><li><li><li><li><li><li><li><li></li></li></li></li></li></li></li></li></li></li></ul>	View All	
*Effective Date	11/23/2021 ]			+ -	
*Format Type	English ~	_			
Display Name			Add Name		
iographic Information					
Date of Birth		Years 0	Months 0		
Birth Country	USA Q	United States			
Birth State	٩				
Birth Location			Exclude Contact	Information?	
Biographical History		Q I	<	View All	
*Effective Date	11/23/2021			+ -	
*Gender	Unknown 🗸				
*Highest Education Level	Not Indicated	~			
*Marital Status	Unknown	~	As of	iii)	
man Code	manne	m	Jamme Maria	mont	mont

- 3. Enter the **Effective Date** (This is the first of the month in which the Spouse turns 65 to be eligible for Medicare).
- 4. Click Add Name.



The Name pop-up window displays.

Name	×
	Help
English Name Format	
Name Prefix	
*First Name	
Middle Name	
*Last Name	
Name Suffix	
Display Name	
Formal Name	
Name	
OK Cancel Refresh	Name

5. Enter the First Name and Last Name.

6. Click OK.

The Modify a Person page returns.

Birth State	Q	Exclude Contact Information?			~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Biographical History	Q I Id	4 1 of 1 ∨ ▶ ▶ 1 \	√iew All		
*Effective Date 11/01/2 *Gender Femal *Highest Education Level Not In *Marital Status Marrie Language Code Alternate ID - Full	021 III e v dicated v d v Time Student	+ As of			
▼ National ID		4	View All		
*Country *National ID Type	National ID	Primary ID	+ -		
Save Notify Refresh Biographical Details   Contact Information	Regional   Organizational Relationsh	Add prize the second se	Update/Display	Include History	Correct History



- 7. Enter the Date of Birth, Gender, Highest Education Level, Marital Status and National ID.
- 8. Click on the **Contact Information** tab.

The Contact Information tab displays.

Add a Perso	on					Modify a Person
Biographical D	etails	ontact Information	<u>R</u> egional	Organizational Relationships	s VA Person Info	
Jessica Doe					Empl ID NEW	
	SSES				I	View All
Address Type	As Of Date	Status	Address			
Home	11/01/2021	A			Add Address Detail	+ -
*Phone Type		Telephone		Extension	Preferred	
		,				+ -
Email Option S	election		ß		,	
Age	ncy Provided	Email OPer	iding Agency Pr	ovided Email O Emplo	oyee Provided Email	
Email Address	es					
*Email Type		*Email Addres	s		Preferred	

9. Click on the Add Address Detail hyperlink.

The Address History page displays.

Add a Person		Modify a Person
Address History		
Address Type Home		
Address History	Q I I 1 of 1 -	
"Effective Date 11/01/2021 III Address Country USA Q "Status A Q Add Address	+ -	
OK Cancel Refresh		

10. Click on the Add Address hyperlink.



#### The Edit Address page displays.

Add a Person		Modify a Person
lit Address		
Country	United States	
Address 1	I	
Address 2		
Address 3		
City	State Q	
Postal		
County		
ок	Cancel	

- 11. Enter the Address.
- 12. Click **OK.**

#### The Address History page returns.

Contact Information		Modify a Person
Address History Address Type Home		
Address History	Q    4 4 1 of 1 v  >  >	
*Effective Date 11/01/2021 110 Country USA Q *Status A Q	Address 100 Main Street Richmond, VA 23832-8468 Henrico	
OK Cancel Refresh		

13. Click **OK.** 



#### The Contact Information page returns.

Contact I	nformation							Modi	fy a Persor
<u>B</u> iographica	al Details Co	ontact Information	<u>R</u> egional	Orgar	izational Relations	hips	VA Person Info		
Jessica Doe	ē						Empl ID NEW		
Current Add	dresses								
<b>≣</b> , Q						14	1-1 of 1 ∨		View All
Address Type	As Of Date	Status	Address						
Home	11/01/2021	А	100 Main Street Richmond, VA 2 Henrico	3832-846	8	Edit	View Address Detail	+	
	mation	Tolophono			Extension	M	I-1 of 1 V		View All
Frione Type	-	Telephone			Extension		Freierieu		
	~							+	
mail Optio	n Selection Agency Provided	Email OP	ending Agency P	rovided I	Email OEr	nployee	Provided Email		
*Email Type	esses	*Email Addre	255				Preferred		
mon ph		*			<b>/</b> "\	_		*	

- 14. If there is any other additional information for the Spouse, enter it on the **Contact Information** tab. (e.g., Phone Number, Email Address, etc.)
- 15. Click on the **Regional** tab.



#### The **Regional** page displays.

Contact Information			Modify a	Person
Biographical Details	t Information Regional	Organizational Relationships	VA Person Info	
Jessica Doe		Per	son ID NEW	
<b>U</b> SA				
Ethnic Group			Q I I 1 of 1 ~	View All
Regulatory Ethnic	Region USA Q Ur c Group Primary	nited States		+ -
History			Q    4 4 1 of 1 v	View All
Effecti Citizenship (I	ve Date 11/01/2021 111 Proof 1) 21 Eligible to Work in	Date Entitlec Citizens n U.S.	I to Medicare	+ -
Veteran				
	ary Status	~		

- 16. Click on the magnifying glass next to **Ethnic Group** and select the corresponding one for the Spouse.
- 17. Click on the VA Person Info tab.

The VA Person Infor tab displays.

Contact Information					Modify a Person
Biographical Details	Contact Information	<u>R</u> egional	Organizational Relationships	VA Person Info	
Jessica Doe			Person ID	NEW	
Power Of Attorney			Linked Participant EmplID		
Preferred Pronoun	~		Preferred Gender	~	
Save Notify Biographical Details   Cor	Refresh	Ac	Id Update/Display In tional Relationships   VA Persor	nclude History C	Correct History



- 18. Enter the **Employee ID** of the employee whose spouse is receiving Medicare, in the **Linked Participant EmpIID** field.
- 19. Click the Organizational Relationships tab.

The Organizational Relationships tab displays.

Contact Information						Modify a Person
Biographical Details	contact Information	<u>R</u> egional	Organizational Relation	onships	VA Person Info	
Jessica Doe				Person II	D NEW	
Choose Org Relationship	to Add					
Employee						
Contingent Worker						
Person of Interest	econd 0					
Empi Ro	ecora U					
Select Checklist	Code Hire		•			
Add Relations	hip					N
						13
Save Notify Re	efresh	Add	Update/Display	Include His	story Correc	et History
Biographical Details   Contact	Information   Region	al   Organizat	tional Relationships   VA	Person Info		

- 20. Check the box next to **Employee**.
- 21. Click on the drop-down arrow next to **Select Checklist Code** and select **Hire**.
- 22. Click on **Add Relationship** button.



#### The Work Location tab displays.

Organizational Relationships					Modify a Person	
Work Location	ation Job <u>L</u> abor	Payroll Salary Plan	<u>C</u> ompensation			
ssica Doe nployee		Empl ID Empl Record 0				
Work Location Details ⑦				(	Q	of 1 🗸 🕨 🕅
*Effective Date	11/01/2021				Go To Row	+ -
Effective Sequence	0		*Action Hire			✓
HR Status	Active		Reason Hire	-VRSRT use only		~
Payroll Status	Active	Jd*	b Indicator Prim	ary Job		~
	Calculate Status	and Dates				
					Current	
Position Number	VRARET00 Q	VRS Retiree Position				
	Override Positi	ion Data				
Position Entry Date	11/01/2021 Position Managemen	t Record				
Regulatory Region	USA	United States				
Company	VRA	VRS Retirees		N		
Business Unit	VRSRT	VRS Retirees		43		
Department	99999	Agency Wide				
Department Entry Date	11/01/2021					
Location	VRA	VRS Retirees				
	VDODT O					

- 23. Select **Hire** from the drop-down menu next to **Action**.
- 24. Select Hire-VRSRT use only from the drop-down menu next to Reason.
- 25. Click on the magnifying glass next to **Position Number** and select the **VRS Retiree Position** number.
- 26. Click on **Job Information** tab.



### The Job Information tab displays.

Organizational Relationships				Modify a	Person
Work Location Job Information	on Job Labor Payroll	Salary Plan Comp	pensation		
lessica Doe Imployee		Empl ID Empl Record 0			
Job Information Details ⑦				QI	1 of 1 v
Effective Date	11/01/2021				Go To Row
Effective Sequence	0		Action Hire	DT	
HR Status	Active		Reason Hire-VRS	RT use only	
Payroli Status	Active	Jo	b Indicator Primary J	OD	Current
Job Code	COVHBO	Health Benefits Only			
Entry Date	11/01/2021		SOC Code		
Supervisor Level	E	Employee	Supervisor Name		
Reports To					
Regular/Temporary	Regular	Full/Part	Full-Time		
Empl Class	~	*Officer Code	None	~	
Regular Shift	لی Not Applicable	Shift Rate			
Classified Ind	Classified	Shift Factor			
Standard Hours ⑦					
Standard Hours	40.00	Work Period	W Weekly		
FTE	Adds to FT Actual Count	2		erride 🦟 🗠	m m m m n

- 27. Click on the drop-down menu next to Empl Class and select VRSRetiree.
- 28. Click on the **Payroll** tab.



# **Benefits Job Aid**

## **BN361 Employee Set Up for Medicare**

The **Payroll** tab displays.

Organizational Relationships			Modi	ify a Person
Work Location	on Job Labor Payroll	Salary Plan		
essica Doe mployee	Em	Empl ID pl Record 0		
Payroll Information ③			Q	I II I
Effective Date	11/01/2021			Go To Row
Effective Sequence	0	Action	Hire	
HR Status	Active	Reason	Hire-VRSRT use only	
Payroll Status	Active	Job Indicator	Primary Job	Current
*Payroll System	Payroll for North America			
Absence System	Other 🗸			
Payroll for North America ⑦				
Pay Group	MNP Q Non-Payroll			
Employee Type	S Q Salaried	Holiday	Schedule NOHOL	Q LOCALITY
Tax Location Code	087 <b>Q</b>			
GL Pay Type	Henrico		Exempt	~
Combination Code		FI	Edit ChartFields	3

- 29. Click on the magnifying glass next to Pay Group and select MNP (Non-Payroll).
- 30. Click on the magnifying glass next to **Tax Location** and select the corresponding code.
- 31. Click on the **Compensation** tab.



#### The **Compensation** tab displays.

Organizational Relationships				Modify a Person
Work Location Job Information Job L	abor Payroll Salary P	lan Compensation		
Jessica Doe Employee	E	Empl ID mpl Record 0		
Compensation Details ⑦				Q    4 4 1 of 1 v )
Effective Date 11/01/20 Effective Sequence 0 HR Status Active Payroll Status Active	121	oL	Action Reason b Indicator	Go To Row Hire Hire-VRSRT use only Primary Job
Compensation Rate ▶ Comparative Information ⑦	0.000000			*Frequency A Q Annual
Pay Rates ⑦     Default Pay Components Pay Components ⑦				
₽ Q				i∉ ∉ 1-1 of 1 ∨ ▶ ▶
Amounts         Controls         Changes	C <u>o</u> nversion <b>II</b> ▶			
*Rate Code Seq Co	omp Rate	Currency	Frequency	Percent
1 - man growing	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	Q.	m	

- 32. Click on the magnifying glass next to **Frequency** and select **M** for **Monthly**.
- 33. Click on **Default Pay Components**.
- 34. Scroll down to the bottom of the page.

The bottom of the **Compensation** page displays.

Compensation Rate	0.000000		*Frequency	M Q Monthly	
Comparative Information ⑦					
▶ Pay Rates ⑦					
Default Pay Components					
ay Components ⑦					
Q     Amounts Controls Changes	Conversion II▶			€ € 1-1 0	of 1 🗸 🕨 🕨
"Rate Code Seq Co	omp Rate	Currency	Frequency	Percent	
1 • 0	0 🗩	٩	٩		+ -
Calculate Compensation					
Job Data Employment Data	a Earnings	Distribution	Benefits Program Pa	rticipation	

35. Enter "0" in the Comp Rate field.



36. Click the Benefit Program Participation hyperlink.

The Benefit Program Participation page displays.

nizational Relationships				Mo	odify a Person
enefit Program Participation					
ica Doe		Empl ID			
oyee		Empl Record	0		
nefit Status ⑦				QIM	<ul> <li>↓ 1 of 1 ∨</li> <li>▶ ▶</li> </ul>
Benefit Record Number				ſ	Go To Row
Effective Date	0			l	
Effective Sequence	11/01/2021	Action	Lira		
HR Status	Active	Reason	Hire-VRSRT use only		
Pavroll Status	Active	Job Indicator	Primary Job		
					Current
*Benefits System	Benefits Administration	~	Benefit	ts Employee Status	Active
Annual Benefits Base Rate		🗖 💷 USD	ACA Eligibility Deta	ills	
enefits Administration Eligibility	0				
BAS Group ID	Q				
Elig Fld 1	٩	Elig Fld 2	۹	Elig Fld 3	٩
Elig Fld 4		Elig Fld 5		Elig Fld 6	
Elig Fld 7		Elig Fld 8	Q	Elig Fld 9	۹
				3	

- 37. Enter "005001000" into Elig Fld 2 for Retiree Regular VRS Managed.
- 38. Enter "12-12" into Elig Fld 8.
- 39. Enter "LS-GB" into Elig Fld 9 for Retiree Linked Spouse-Grp Bill.
- 40. Scroll down to the bottom of the page.



The bottom of the **Benefit Program Participation** page displays.

fits Administ	ration Fligibility (?)	030			
	BAS Group ID				
	Elig Fld 1 Q	Elig Fld 2	005001000 <b>Q</b>	Elig Fld 3 Q	
	Elig Fld 4	Elig Fld 5		Elig Fld 6	
	Elig Fld 7	Elig Fld 8	12-12 <b>Q</b>	Elig Fld 9 LS-GB Q	
t Program Pa	rticipation Details ⑦		QIM	▲ 1 of 1 ~ ▶ ▶ I View All	
	Effective Date 11/01/2021	Currency Code	USD	+ -	
*Be	enefit Program RET Q	Sys delivered emp	ty Ben Pgm		
Data	Employment Data	Earnings D	Distribution	Benefits Program Participation	

- 41. Change the **Benefit Program** to "**RET**".
- 42. Click **OK.**

Note: Click OK if any warning pop-up boxes appear.

43. Navigate to the **Modify a Person** page of the employee through the following path:

Navigator > Workforce Administration > Personal Information > Modify a Person



### The **Personal Data** search page displays.

	Personal Data
Personal Data	
Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value         Add a New Value	
▼ Search Criteria	
Empl ID begins with 🗸	
Name begins with 🗸	
Last Name begins with 🗸	
Second Last Name begins with 🗸	
Alternate Character Name begins with 🗸	
Middle Name begins with 🗸	
Include History Correct History Case Sensitive	
Limit the number of results to (up to 300): 300	
Search Clear Basic Search 🖾 Save Search Criteria	
Find an Existing Value   Add a New Value	

- 44. Enter the **Empl ID** of the employee.
- 45. Click Search.



### The **Biographical Details** page displays.

				Modify a Person
Biographica	al Details C	ontact Information	ional VA Person Info	
JOHN DOE			Person ID	
Name			Q    4 4 1 of 1 ~ > > >     View Al	1
	Effective Date Format Type Display Name	07/25/2015 English JOHN DOE	View Name	
Biographic Ir	nformation			
	Date of Birth	06/16/1968	Years 53 Months 5	
	Date of Death	n 🛄		
	Birth Country	USA Q	United States	
	Birth State	a Q		
	Birth Location	1	Exclude Contact Information?	
Biographi	ical History		Q I I I I I I I I I I View Al	I
	*Effective Date	07/25/2015	+ -	
	*Gender	Female V		
*Highest	Education Level	A-Not Indicated	~	
1	*Marital Status	Married	As of 04/26/2021	

46. Click on the VA Person Info tab.

The VA Person Info tab displays.

	Modify a Person
Biographical Details Contact Information Regional	VA Person Info
JOHN DOE	Person ID
Power Of Attorney	Linked Participant EmpIID
Preferred Pronoun	Preferred Gender
Save Return to Search Notify Refresh	Add Update/Display Include History Correct History
Biographical Details   Contact Information   Regional   VA Perso	in Info

- 47. Enter the Employee Spouse's EmplID in the Linked Participant EmplID field.
- 48. Click Save.



### **Enroll the Spouse in Medicare**

Once the Spouse has been hired into Cardinal and linked with the employee, the Spouse will now be eligible for Medicare benefit enrollment. The Agency BA will now navigate to the **On-Demand Event Maintenance** page and process the New Hire Medicare benefit enrollment for the Spouse.

1. Navigate to the **On-Demand Event Maintenance** page using the following path:

Homepage > Benefit Administrator Tile > Benefit Management > On-Demand Event Maintenance

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

	Benefits Administrator
On-Demand Event M	aintenance
Enter any information you hav	e and click Search. Leave fields blank for a list of all values.
Find an Existing Value	
▼ Search Criteria	
Empl ID	begins with 🗸
Empl Record	= ~
Name	begins with V
Last Name	begins with 🗸
Second Last Name	begins with 🗸
Alternate Character Name	begins with 🖌
□ Case Sensitive	
Limit the number of results to	(up to 300): 300
Search Clear Ba	sic Search 🖉 Save Search Criteria

- 2. Enter the Spouse's **Empl ID** in the search field.
- 3. Click Search.



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

Review BAS Activity		On-Demand Event Maintenance
On-Demand Event Maintenand	ce	
Jessica Doe		Person ID Ben Record 0
Activity Date 11/01/2021	Source Job Data Change	Empl Record 0
Schedule/Prepare Activity	Pending Activities 1	Show Activities Action HIR
Event ID 0 Event Date	Status	Class Event Status Update
Prepare Options		Event Status
Enrollment Statement	Run Date	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 No	otify	Horna - Roccarry

4. Click the Schedule/Prepare Activity button.

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

A stivity Data	Cauraa			Ener	Decend		
Schedule/Prepare Activity	Source	0	Empl Record		Action	0	
Scheduler repare Activity	Pending Activities	0	SHOW ACTIVITE		Action		
Event ID 1 Event Date	11/01/2021	Status	Prepared Class	HIR	Even	it Status Update	•
Prepare Options	_		Event Status	S Open f	or Processing		
Enrollment Statement	Run Date		Frequency				
			Deduction Frequence	cy ⊖Ann	ual Frequency	/	
	7						
Election Entry	Entered <sub>0</sub> of	1	Show Plans				
Validate/Finalize	Errors 0		Show Errors	🗆 Finali	ize/Apply Defa	aults	
Confirmation Statement	Run Date						
Reprocess	Process Indicator	N Q	Nerral December				
Save Return to Search	Notify		Normal Processing				
	totily						

5. Click the **Election Entry** button.


#### The BenAdmin Data Entry page displays.

			BenAdr	nin Data Entr	У			
nt / Participa	Int Selection Option	n Election	nts / Beneficiaries					
Sched I Event Dat	D EM00 Ei ta 11/01/2021 Initial Ei	mpl ID nrollment	Jessica Doe	Excess Cre	Ben Record ( dit Rollover To For	) Event ID 1 feit Excess Credits		
vailable Pla	ans and Options ⑦						Q   1 of 1 v	
Type 10 : I	Medical							
	Option Code   Q						¢	
	Health Provider ID		□ P	reviously Seen				
	Ð				Special I	Requirements		
ependents	Beneficiaries							
Dependent	s/Beneficiaries							
Dependent *ID	s/Beneficiaries Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		
Dependent *ID	s/Beneficiaries Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		
×ID <pre>Compared a compared a compare compared a compared a com</pre>	s/Beneficiaries Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		
Dependent *ID 	S/Beneficiaries Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		

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

The Look Up Option Code pop-up displays.

		B	enAdmin	Data Er	itry			
Event / Participant Selection Option Election Dependents / Beneficiaries			ies					
Sched ID EM00 Empl ID Event Data 11/01/2021 Initial Enrollmen		Jessica Doe		Excess 0	Ben Ree Fredit Rollove	cord 0 I er To Forfeit Exces	Event ID 1 s Credits	
Available Plans and Options ③	ook Up Op	otion Co	ode ×			Q   1 of 1 ~		
n Type 10 : Medical		Cance	I		Help			
Option Code		Search R	esults					¢
Health Provider ID		Option Code	Option Type	Benefit Plan	Coverage Code	Special Requireme	ents	
Dependents/Beneficiaries		104	Option	MODV	1			
Enroll All		57	Option	65DV	1			
		96	Option	65MO	1			
Dependents/Beneficiaries		97	Option	A65	1			
*ID Name R	elationship to nployee	w	Waive Optn	(blank)	(blank)	/pe Ag	e Limit Flag	
Q					_			_

7. Select one of the available Medical Plans.



#### The BenAdmin Data Entry page returns.

		BenAdn	nin Data Entry	/		
ent / Participant Selection Opti	on Election	ents / Beneficiaries				
Sched ID EM00 Event Data 11/01/2021 Initial	Empl ID Enrollment	Jessica Doe	Excess Cred	Ben Record ( lit Rollover To For	Event ID 1 feit Excess Credits	
vailable Plans and Options ⑦						Q   1 of 1 ~
Type 10 : Medical						
						\$
Option Code 97	Advantage 65 + RX	((A65) (Single)				
Option Code [97 0 Health Provider ID	Advantage 65 + RX	( (A65) (Single)	reviously Seen			
Option Code P7	Advantage 65 + RX	( (A65) (Single)	reviously Seen	Special F	Requirements	
Option Code p7 4 Health Provider ID ependents/Beneficiaries Enroll All	Advantage 65 + RX	( (A65) (Single)	reviously Seen	Special F	Requirements	
Option Code p7 d Health Provider ID ependents/Beneficiaries Enroll All Dependents/Beneficiaries	Advantage 65 + RX	( (A65) (Single)	reviously Seen	Special F	Requirements	
Option Code p7 4 Health Provider ID ependents/Beneficiaries Enroll All Dependents/Beneficiaries	Advantage 65 + RX	( (A65) (Single)	reviously Seen	Special F Covered Person Type	Requirements Age Limit Flag	

8. Click **OK** at the bottom of the page.

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

essica Doe		Person ID	Ben Record 0
Activity Date 11/01/2021	Source Benefits Person		Empl Record 0
Schedule/Prepare Activity	Pending Activities 1	Show Activities	Action MSC
Event ID 1 Event Da	te 11/01/2021 Status	Entered Class H	HIR Event Status Update
Prepare Options		Event Status	Open for Processing
Enrollment Statement	Run Date	Frequency	
		Deduction Frequency	Annual Frequency
Election Entry	Entered 1 of 1	Show Plans	
Validate/Finalize	Errors 0	Show Errors	Finalize/Apply Defaults
Confirmation Statement	Run Date		
Reprocess	Process Indicator N Q	]	
Save Return to Search	Notify	Normal Processing	

9. Click Validate/Finalize button.



The On-Demand Event Maintenance page refreshes.

Activity Date 11/01/	2021	Source Benef	ts Person		Emp	ol Record 0	
Schedule/Prepare	Activity	Pending Activities	1	Show Activities		Action MSC	
Event ID 1	Event Date	11/01/2021	Status	Finalized - Enrolled Class	HIR	Event Status Update	
Prepare Opti	ons			Event Status	Closed	d to Processing	
Enrollment Stat	ement	Run Date		Frequency			
				Deduction Frequency	OAnr	nual Frequency	
Election En	try	Entered 0 of	0	Show Plans			
Validate/Fina	lize	Errors 0		Show Errors	Final	lize/Apply Defaults	
Confirmation Sta	itement	Run Date					
Reprocess	5	Process Indicator	N				

Note: The Hire event has been closed to processing, but the MSC is still waiting to be processed.

10. Click the Schedule/Prepare Activity button.



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

S Name		On-Demand Event Maintenance	
On-Demand Event Maintenand	e		
Jessica Doe		Person ID Ben Record 0	
Activity Date	Source	Empl Record 0	
Schedule/Prepare Activity	Pending Activities 0	Show Activities Action	
Event ID 0 Event Date	Status	Class Event Status Update	
Prepare Options		Event Status	
Enrollment Statement	Run Date	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 No	tify		

**Note:** Once the **MSC** event is scheduled the event automatically closes out. The **GEM** event is processed first so that in Cardinal an audit trail exists depicting the enrollment opportunity was due to Gain Eligibility for Medicare. While the MSC event will provide the same enrollment opportunities, the connection would be too "Miscellaneous" which does not depict the reason.

11. Navigate to the **Health Benefits** page for the Spouse to confirm medical benefit enrollment using the following path:

### Navigator > Benefits > Enroll in Benefits > Health Benefits



### The Health Benefits search page displays.

Name	Health Benefits
Health Benefits Enter any information you have and click Search. Leave fields blank for a list of all values.	
Find an Existing Value	
▼ Search Criteria	
Empl ID begins with	
Benefit Record Number = -	
Name begins with 🗸	
Last Name begins with 🗸	
Business Unit begins with 🗸	
Department Set ID begins with 🗸	
Department begins with	
Organizational Relationship =	
Alternate Character Name begins with 🗸	
Include History Correct History Case Sensitive	
Limit the number of results to (up to 300): 300	
Search Clear Basic Search 🖾 Save Search Criteria	

- 12. Enter the Spouse's Empl ID.
- 13. Click Search.



### The Health Benefits page displays.

Name			Health Be	nefits
ealth Benefits	Employee	ID	Benefit Record Number 0	
'lan Type				Q    4 4 1 of 1 v 🕨 🕅   View A
	Plan Type 10 Medical			+ -
Coverage				Q     I I I of 1 - I View All
*Cover	age Begin Date (11/01/2021 👬 🦿	*Deduc	ttion Begin Date 11/01/2021 👬 🥠	+ -
Elect	OWaive O Terminate	¢.	*Election Date 11/23/2021	
	Benefit Program RET Benefit Plan A65 Q Coverage Code 1 Q	Advantage 65 + RX Single	Option Code 97	
H	ealth Provider ID		en	
Enroll All	Employee Status Active Dependents			13
<b>\$</b>				1-1 of 1 🗸
some Amon	- tionstor	molos malar	Mon Prev monteson	man and a second

14. Confirm the **Medical** plan enrollment for the **Spouse** is correct.