

#### **Benefit Event Status Report Overview**

This report lists all participants in a particular process status or set of status levels.

Benefit Events go through four steps; (1) Assign Benefit Program, (2) Prepare Options, (3) Enter Elections, and (4) Finalize Enrollment. A Benefit Event's process status indicates what step the Benefit Event is on and whether any errors have occurred for that step. For example, a status of "Assigned" indicates that the Benefit Event has assigned a Benefit Program to the employee, but has not yet prepared the employee's benefit options, entered elections for the employee, or finalized the employee's enrollment. A status of "Prepare Error" indicates that the Benefit Event assigned a Benefit Program to the employee but encountered an error when preparing the employee's benefit options.

This report should be run regularly by the Benefit Administrators to check on Open Benefit Events and those Benefit Events with a Processing Error. This report can also be used to monitor Benefit Events that were initiated by employees through Employee-Self Service (ESS).

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## **Revision History**

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Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages ( <u>Section 1</u> , after Step 1 and 2). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



#### How to Run the Benefit Event Status Report

Run the Benefit Event Status Report to locate Benefit Events in the various statuses. Research the Benefit Event in question and intervene as applicable, so that the Benefit Event can continue to move through the Ben Admin process during the next run of Ben Admin.

Step	Action
1.	Navigate to the Benefit Event Status Report using the following path:
	NavBar > Menu > Benefits > Managed Automated Enrollment >Investigate Exceptions > Benefit Event Status Report
The <b>Be</b>	nefit Status Event Report Find an Existing Value page displays.
ſ	← Cardinal Homepage Benefit Status Event Report
	Benefit Status Event Report
	Find an Existing Value
	<ul> <li>✓ Search Criteria</li> <li>Enter any information you have and click Search. Leave fields blank for a list of all values.</li> </ul>
	🕄 Recent Searches Choose from recent searches 🗸 🆉 🗅 Saved Searches Choose from saved searches 🗸
	Search by: Run Control ID begins with
	✓ Show more options
	Search
i	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in <b>Job Aids</b> under <b>Learning</b> .
i	If the BA has a saved Run Control ID, skip to Step 5.
2.	Click the Add a New Value button.
	← Cardinal Homepage Benefit Status Event Report
	Benefit Status Event Report
	Find an Existing Value
	<ul> <li>✓ Search Criteria</li> <li>Enter any information you have and click Search. Leave fields blank for a list of all values.</li> </ul>
	🕄 Recent Searches Choose from recent searches 🗸 🥢 🗅 Saved Searches Choose from saved searches 🗸
	Search by: Run Control ID begins with
	✓ Show more options
	Search



Step	Action
The <b>Be</b>	nefit Status Event Report Add a New Value page displays.
	Cardinal Homepage Benefit Status Event Report
	Benefit Status Event Report
	Add a New Value
	*Run Control ID
3.	Enter a new Run Control ID in the Run Control ID field.
	*Run Control ID
	Add
4.	Click the <b>Add</b> button.
	*Run Control ID
	Add



Step	Action
The Ber	nefit Status Event Report parameters display.
	Cardinal Homepage Benefit Status Event
	Benefit Event Status Report
	Benefit Event Status Report
	Run Control ID     Yesy_1     Report Manager     Process Monitor     Run       Language     English
	Schedule ID       Q       (Leave blank for all schedules)         *From Date       Image: Arrow of the test of tes
	Process Status to Include:
	(Leave all boxes unchecked to include all)         Assign None       Elections Entered         Assign Error       Election Error         Assigned       Re-Enter         Prepare Error       Finalized - Benefit Prog None         Prepared       Finalized - Prepare None         Notified       Finalized - Enrolled
	Save Notify Add Update/Display
5.	Click the <b>Schedule ID Look Up</b> icon and select the applicable Schedule ID. Most of the time it will be "EM00" unless working with Open Enrollment Benefit Events (Schedule ID "OE##" in this case).
6.	Select a from date and a to date using the <b>From Date Calendar</b> icon and the <b>To Date Calendar</b> icon.
	*From Date To Date
7.	Click the <b>Event Status</b> dropdown button and select the applicable Event Status.
	*Event Status Open 🗸



Step	Action
1	The BA can also select one or several Process Statuses to include in the report by clicking the corresponding checkbox options within the Process Status to Include section.         Process Status to Include:         (Leave all boxes unchecked to include all)         Assign None       Elections Entered         Assigned       Re-Enter         Prepare Error       Finalized - Benefit Prog None         Prepared       Finalized - Prepare None         Notified       Finalized - Enrolled
8.	Click the Save button.           Save         Notify
9.	Click the <b>Run</b> button.
The Pro	cess Scheduler Request page displays in a pop-up window.
	Process Scheduler Request ×
	Help           User ID         V_TRN_BN36101         Run Control ID         Yesy_1           Server Name                10/29/2024
	Recurrence     Run Time     Reset to Current Date/Time       Time Zone     Q       Process List
	Select         Description         Process Name         Process Type         *Type         *Format         Distribution           Image: Select Status Report         VBNR0300         SQR Report         Web •         PDF •         Distribution
	OK Cancel
10.	Select the type and format to run the report in using the <b>Type</b> and <b>Format</b> fields.
	Select         Description         Process Name         Process Type         'Format         Distribution           Image: Select         Benefit Event Status Report         VBNR0300         SQR Report         Web ~         PDF ~         Distribution
11.	Click the <b>OK</b> button.



Step	Action
The <b>Ber</b>	nefit Event Status Report parameters page redisplays.
	Cardinal Homepage Benefit Status Event
	Benefit Event Status Report
	Benefit Event Status Report
	Run Control ID     Yesy_1     Report Manager     Process Monitor     Run       Language     English
	Schedule ID     Q     (Leave blank for all schedules)       *From Date     *To Date
	*Event Status Open  Display Message Data Process Status to Include:
	(Leave all boxes unchecked to include all)         Assign None         Elections Entered         Assign Error         Election Error         Assigned         Re-Enter
	Prepare Error     Finalized - Benefit Prog None       Prepared     Finalized - Prepare None       Notified     Finalized - Enrolled
	Save Notify Add Update/Display
12.	Click the <b>Process Monitor</b> link.
	Benefit Event Status Report
	Run Control ID     Yesy_1     Report Manager     Process Monitor     Run       Language     English



Step	Ac	tion									
The Pro	ces	s Monit	<b>or</b> pag	e displays.							
	Cardi	nal Homepage						Proces	s Monitor		
	Proce	ss List									
	View Pro	cess Request f	For								
	Userl	D V_TRN_BN3	51 Q T	vpe	► Last	~	1 Days 🗸	Refresh			
	Serv	er	✓ Na	me	Q Instance	P From	Instance To	Report Manager			
	Run St	atus	~	Distribution Status		✓ Save On Re	fresh				
P	rocess L	ist									_
	<b>≣</b> , Q								1-1 of 1 🗸 🕨	▶   View A	
2	Select	Instance See	ą. Pro	cess Type	Process Name	User	Run Date/Time	Run Stat	us Distributio Status	n Details	
		1322133	SQ	R Report	VBNR0300	V_TRN_BN36102	12/06/2021 2:43:50PM EST	Success	Posted	Details	
13.	Dis			t button peri s is "Posted		/ until the I	Run Status for	the repo	rt is "Suc	cess" ar	nd the
	View	Process Re	quest For								
	- U	Iser ID V_TR	N_BN361	۲уре		✓ Last	~	1 Days	~	Refresh	
		Server	~	Name		Q Instance Fr	rom Inst	ance To	Rep	ort Manager	-
	R	un Status		➤ Distribution	n Status		<ul> <li>Save On Refresh</li> </ul>				
14.	Clie	ck on the	e <b>Deta</b>	ils link.							
	Proce	ess List									
	E.	Q							€ € 1-1	of 1 🗸 🗼 🗎	View All
	Selee	t Instance	Seq.	Process Type	Process Name	s User	Run Date/Time		Run Status	Distribution Status	Details
		1322133		SQR Report	VBNR03	300 V_TRN_BN3	5102 12/06/2021 2:43:	50PM EST	Success	Posted	Details



Step Action	on
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		Process D	etail		×
					Help
Process					
Instan	ice 1322133		Type SQR Report		
Nar	me VBNR0300	Descri		atus Report	
Run Stat	tus Success	Distribution S	Status Posted		
Run		Upd	date Process		
Run Contro	ol ID Yesy_1		Hold Request		
Loca			Queue Request Cancel Request		
Se	erver PSUNX1		Delete Request		
Recurre	ence		Re-send Content	○ Restart Request	
Date/Time		Ac	tions		
Request	Created On 12/06/2021	2:45:41PM EST	Parameters	Transfer	
	ytime After 12/06/2021		Message Log		
Began	Process At 12/06/2021	2:45:55PM EST	Batch Timings View Log/Trace		
Ended	Process At 12/06/2021	2:46:05PM EST	-		
ОК Са	ncel				
					.:
Click the View L	og/Trace link.				
Date/Time			Actions		
Request Cr	reated On 12/06/202	1 2:45:41PM EST	Parameters	Transfer	
Run Anyt	time After 12/06/202	1 2:43:50PM EST	Message Log		
-	rocess At 12/06/202	1 2:45:55PM EST	Batch Timings View Log/Trac		
Ended P	rocess At 12/06/202	1 2:46:05PM EST	View Log/Trac	ce -	



The View Log/Trace page displays.

			View Log/Trace		×
		Report Report ID 761478 Name VBNR0300 Run Status Success	Process Instance 132213 Process Type SQR Re	3 Message Log	elp
		Benefit Event Status Report Distribution Details Distribution Node hrpytm	Expiration Date 01	/05/2022	
		File List			
		Name	File Size (bytes)	Datetime Created	
		SQR_VBNR0300_1322133.log	2,180	12/06/2021 2:46:05.625818PM EST	
		vbnr0300_1322133.PDF	3,512	12/06/2021 2:46:05.625818PM EST	
		vbnr0300_1322133.out	139	12/06/2021 2:46:05.625818PM EST	
		Distribute To Distribution ID Type	*Distribution ID		
		User	V_TRN_BN36102		
		Return			.::
16.		e . <b>PDF</b> output (if the fo	rmat chosen was	PDF).	
	File List Name		File Size (bytes)	Datetime Created	
	SQR_VBN	R0300_1322133.log	2,180	12/06/2021 2:46:05.625818PM EST	
	vbnr0300_	1322133.PDF	3,512	12/06/2021 2:46:05.625818PM EST	
	vbnr0300_	1322133.out	139	12/06/2021 2:46:05.625818PM EST	

The **Report** displays in a separate tab.

Process Employee         Employee         Schedule Event         Event         Event Event         Process Denefit           Status ID         Name         ID         ID         Date         Class Status Indicator Program           FE         00092634600         Lily Fad         EM00         1         12/31/2020         MAR         O         N         SAL         N	Report 1	ID: VBNR0300							Ве		PaopleSoft Status Report	Page No. 1 Run Date 12/06/2021 Run Time 15:00:40
PE 00092634600 Lily Pad EM00 1 12/31/2020 NAR O N EAL N	Status	ID						Status	Indicator	Program	5	
	PE	00092634600	Lily Pad	EMOO	1	12/31/2020	MAR	0	N	SAL	N	



Step	Action
i	The report displays the <b>Process Status, Process Indicator,</b> and <b>Benefit Program</b> among other sets of data. The BA can use this information to see any open Benefit Events, and what stage in the process the Benefit Event is currently in. This is especially helpful for processing New Hires and tracking the status of the open Benefit Events.