

Enrollment Steps for an Employee Overview

This Job Aid provides a walkthrough of the enrollment steps for an employee through both New Hire and Open Enrollment processes in Cardinal Employee Self-Service.

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Benefit Enrollment (New Hire)

		✓ Cardinal Homepage			^	٢
Cardinal Message Board		Cardinal Portal	Time	Payroll		
	0 s) published today 0 tive message(s)		~	• 5 •		
Personal Details	Benefit Details	Total Rewards	Job Summary			

2. Navigate to the **Benefit Details** page using the following path:

Homepage > Benefit Details tile

Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

The **Benefit Details** page displays.

1.

Employee Self Service	Benefit Details	<u>ନ</u> ସ୍ :
Benefits Summary	\odot	
🙀 Life Events	Benefits Summary	
Dependent/Beneficiary Info	As Of 11/10/2020	
👸 Benefits Enrollment	Refresh	
😩 Benefit Statements	Type of Benefit Plan Description Coverage or Participation	
fm Affordable Care Act	·	>

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



The Benefit Details page refreshes with the Benefits Enrollment information.

C Employee Self Service	Benefit Details	<u>ନ</u> ସ୍ :
Benefits Summary	the first factory	
🙀 Life Events	Benefits Enrollment	
Dependent/Beneficiary Info	After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a qualified family status change. The information icon provides you with additional information about your enrollment.	
📸 Benefits Enrollment	The Select button next to an event means it is currently open for enrollment. Use the Select button to begin your enrollment. Note: Some events may be temporarily closed until you have completed enrollment for a prior event.	
Benefit Statements	Your Benefit Events	
m Affordable Care Act	✓ Event Description ♦ Event Date ◊ Event Status ◊ Job Title ◊	
	Initial Enrollment () 06/01/2020 Open Instructor Start	

4. Click the **Start** button.

The **Benefits Enrollment** page displays.

Note: The Benefit Plans available on this screen depend on the employee's benefits eligibility (i.e., if the employee is eligible for FSA Medical, a tile for FSA Medical would appear on this screen.)

enefits Enrollment ne Enrollment Overview displays which benefit options are open for edits. All Enrollment Summary	of your benefit changes will be effective the date of the open enrollment event.
Your Pay Period Cost \$0.00 Status Pending Review Enrollment Preview Statement Submit Enrollment	Full Cost \$0.00 Employer Cost \$0.00
enefit Plans	
Medical Current No Coverage New Waive Status Pending Review ⅔ 0 Dependents	
Pay Period Cost \$0.00 Review	

5. Click the **Review** link within the **Medical** Tile to begin the enrollment process.



The **Medical** page displays.

ncel				Medi	ical		
of our me verage.	dical choices promote wellness as part of their	ir benefits and are av	vailable to protect you and	your dependents if you be	ecome sick or injured. En	rollment in this benefit may	require proof of
Enroll Y	our Dependents						
pendents	that the employee has registered are listed he	ere. To add a new de	pendent, go to the Depend	dent/Beneficiary Information	on.		
u have no	dependent registered						
Add Dep	endent						
Enroll in	Your Plan						
	Cost showing is based on the dependents enro	olled. Plans that do n	ot offer coverage for the d	ependents enrolled are no	ot available to select. To s	see other coverage cost, se	elect the help icon ne
each plan	option.						
each plan	Plan Name		Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost	
each plan			Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost \$0.00	
	Plan Name	0	Cost (Before Tax) \$127.00	Cost (After Tax)	Employer Cost \$653.00	-	
~	Plan Name Waive	0		Cost (After Tax)		\$0.00	
∽ Select	Plan Name Walve Key Adv 250 Comprehensive Dent	-	\$127.00	Cost (After Tax)	\$653.00	\$0.00 \$127.00	
Select Select	Plan Name Waive Key Adv 250 Comprehensive Dent Key Adv 250 Preventive Dent	0	\$127.00 \$110.00	Cost (After Tax)	\$653.00 \$653.00	\$0.00 \$127.00 \$110.00	
✓ Select Select Select	Plan Name Waive Key Adv 250 Comprehensive Dent Key Adv 250 Preventive Dent Key Adv 500 Comprehensive Dent	0	\$127.00 \$110.00 \$44.00	Cost (After Tax)	\$653.00 \$653.00 \$653.00	\$0.00 \$127.00 \$110.00 \$44.00	

Note: Employees can add dependents and select medical coverage on this page.

6. Click the **Add Dependent** button.

The **Dependent and Beneficiary Information** page displays (in this example, there are no dependents currently listed for the employee).

Dependent and Beneficiary Information	×
Dependent and Beneficiary Information	
No data exists	
Add Individual	

7. Click the **Add Individual** button to add a dependent to the Employee Record.



The Individual Dependent/Beneficiary Information page refreshes.

Cancel	ndividual Depend	ent/Beneficiary Informatio	n	Save
Select Save after you have edited your Dependent	Beneficiary's information.	The changes will go into effect on Ju	in 1, 2020.	*
Name				
Add Name				_
Personal Information				
Date of Birth		i		
*Gender	~			
*Relationship to Employee		~		
*Marital Status	Single 🖌	As	of	
*Student	No 🗸	As	of	
*Disabled	No 🗸	As	of	
*Smoker	Non Smoker 🗸	As	of	
m	mental market of		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~

8. Click the **Add Name** button.

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

Cancel	Name	Done
Name Format	English 🗸	
Name Prefix	~	
*First Name		
Middle Name		
*Last Name		
Name Suffix	~	
Display Name		
Formal Name		
Name		

- 9. Enter the dependent's name information. The **First Name** and **Last Name** fields are required.
- 10. Click the **Done** button.



The Individual Dependent/Beneficiary Information page returns.

Cancel		In	dividual Dependent/Beneficiary I	nformatior
Select Save aft	er you have edited your Dependent/Beneficiary's in	formation. The changes will go i	nto effect on Jul 26, 2021.	
Name				
Beverly Leslie				>
Personal Info	ormation			
	Date of Birth			
	*Gender 🗸 🗸	•		
	*Relationship to Employee	~		
	*Marital Status Single ~	1	As of	
	*Student No V		As of	
	*Disabled No 🗸		As of	
	*Smoker Non Smoker	~ ~	As of	
			\searrow	
Address				
Address		Address Type	Same as mine	
10971 Elmont Glen Allen, VA Hanover		Home	Same as mine	>

- 11. Input the dependent's date of birth in the **Date of Birth** field or select the appropriate Date of Birth using the **Date of Birth Calendar** icon.
- 12. Select the dependent's appropriate gender from the **Gender** drop-down list.
- 13. Select the dependent's appropriate relationship using the **Relationship to Employee** drop-down list.
- 14. Select the dependent's appropriate marital status using the Marital Status drop-down list.
- 15. Verify the **Address** section is set to **Same as mine**.
- 16. Scroll down to the **National ID** section and click on the **Add National ID** button.

The National ID page displays in a pop-up window.



Cancel		National ID	Done
	*Country	~	
	*National ID Type	~	
	*National ID		
	Primary	Yes	

- 17. Complete the Country, National ID Type, and National ID fields for the dependent.
- 18. Click the **Done** button.



The Individual Dependent/Beneficiary Information page returns.

Country	National ID Type	National ID	Primary	
United States	Social Security Number	101-00-000	~	;
Phone				
No data exists Add Phone				
Email				

19. Click the Add Phone button.

The **Phone Number** page displays in a pop-up window.

Cancel	Phone Number	Done
Same as mine	No	
Туре	•	
Number		
Extension		
Preferred	No	

- 20. Select "Yes" for the **Same as Mine** field or complete the fields, as applicable.
- 21. Click the **Done** button.

The Individual Dependent/Beneficiary Information page returns.

Phone +					
Number	Extension	Phone Type	Same as Mine	Preferred	
			~	~	>
Email					
No data exists					
Add Email					



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22. Click the Add Email button.

The Email Address page displays in a pop-up window.

Cancel		Email Address	Done
	*Email Type *Email Address	✓	
		Delete	

- 23. Select the Email Type from the **Email Type** drop-down list and enter the applicable Email Address in the **Email Address** field.
- 24. Click the **Done** button.

The Individual Dependent/Beneficiary Information page returns.

Cancel			Individua	I Depend	ent/Benefic	iary Info	rmati
Da	ate of Birth 08/21/1968						
	*Gender Male 🗸						
*Relationship to	Employee Spouse	~					
*Mar	rital Status Married V			As of			
	*Student No 🗸			As of			
	*Disabled No 🗸			As of			
	*Smoker Non Smoker	•		As of			
		Address Type		Same as m	line		
Address Address 10971 Eimont Woods Drive Glen Allen, VA 23059 Hanover		Address Type Home		Same as m			>
Address 10971 Eimont Woods Drive Glen Allen, VA 23059 Hanover							>
Address 10971 Elmont Woods Drive Glen Allen, VA 23059							>
Address 10971 Elmont Woods Drive Glen Allen, VA 23059 Hanover National ID	tional ID Type	Home	National ID				>

25. Scroll up, as required, and click the **Save** button in the top right-hand corner.

Note: The record will save without a National ID entered, but Agency Benefit Administrators (BAs) are tasked with obtaining it.

The **Saved Successfully** page displays in a pop-up window.



:	Saved Successfully
	ок

26. Click the **OK** button.

The Individual Dependent/Beneficiary Information page returns.

	Dependent and Ben	eficiary Information		×
Add Individual				2
Name	Relationship	Beneficiary	Dependent	45
	Spouse	~	✓	>

- 27. Repeat steps 6 29 as required until all dependents are added.
- 28. After all dependent(s) are added, click the X (Close) button in the upper right-hand corner.

The **Medical** page returns.

Cancel				Med	ical	
All of our med coverage.	dical choices promote wellness as part of their	ir benefits and are	available to protect you and	l your dependents if you b	ecome sick or injured. En	rollment in this benefit m
 Enroll Yo 	ur Dependents					
Dependents t	hat the employee has registered are listed he	ere. To add a new o	dependent, go to the Depen	dent/Beneficiary Informati	ion.	
	Dependents			Relationship		
	Receiption in the			Spouse		
Add Depe	ndent					
Enroll in	Your Plan					
	ouse Cost showing is based on the depende ach plan option.	ents enrolled. Plans	s that do not offer coverage	for the dependents enrolle	ed are not available to sele	ect. To see other coverag
	Plan Name		Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
Select	Waive					\$0.00
Select	Key Adv 250 Comprehensive Dent	0	\$348.00		\$1096.00	\$348.00
Select	Key Adv 250 Preventive Dent	0	\$316.00		\$1096.00	\$316.00
Select	Key Adv 500 Comprehensive Dent	0	\$193.00		\$1096.00	\$193.00
~	Key Adv 500 Preventive Dent	0	\$162.00		\$1096.00	\$162.00

- 29. Within the **Enroll Your Dependents** section, select the **Enroll** checkbox option for the dependent(s) being added.
- 30. Within the **Enroll in Your Plan** section, click the **Select** button to select the applicable Benefits Plan.
- 31. Click the **Done** button in the upper right-hand corner.

The Benefit Details page returns.

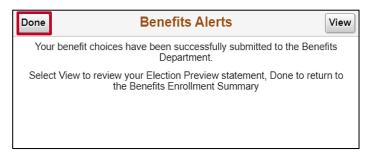


< Back	Benefit Details	
Benefits Summary	The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will b	be effective the date of the open enrollment event.
n Life Events	Your Pay Period Cost \$162.00 Full Cost \$16	32.00
Dependent/Beneficiary Info	Status Pending Review Employer Cost \$1,	096.00
😼 Benefits Enrollment	Enrollment Preview Statement	Medical
Benefit Statements	Submit Enrollment	
	Benefit Plans Medical Current No Coverage New Key Adv 500 Preventive Dent Status Changed I Dependents Pay Period Cost \$162.00 Review	

Note: The **Medical** tile now displays the coverage selected and the number of dependents enrolled along with the Pay Period Cost. The colored bar across the top of each tile changes color after that tile is reviewed. In the above screenshot, the **Medical** tile is green because it was already reviewed; the other tiles have not been reviewed and therefore have a blue bar.

32. Click the **Submit Enrollment** button.

The Benefits Alerts page displays in a pop-up window.



33. Click the **Done** button.

Note: Alternatively, click the View button to return and review the Benefits Enrollment information.

The **Benefit Details** page returns, and enrollment is now complete.



Benefits Enrollment (Open Enrollment)

		 Cardinal Homepage 			â	: 0
Cardinal Message Board		Cardinal Portal	Time	Payroll		
	0 published today 0 e message(s)			• 5 •		
Personal Details	Benefit Details	Total Rewards	Job Summary			

1. Navigate to the **Benefit Details** page using the following path:

Homepage > Benefit Details tile

Note: Individual **Cardinal Homepage** tile availability and locations may appear differently based upon individual preferences and security settings.

The **Benefits Summary** page displays.

	Employee Self Service	Benefit Details	A .	: Ø
1	Benefits Summary	\odot		
ť	Life Events	Benefits Summary		
42	Dependent/Beneficiary Info	As Of 11/10/2020		
4.12	Benefits Enrollment	Refresh		
1	Benefit Statements	Type of Benefit Plan Description Coverage or Participation		
1	Affordable Care Act 🗸 🗸		>	

2. Click on **Benefits Enrollment** on the left-hand menu.

🙀 Life Events	Benefits Enrollment			
Dependent/Beneficiary Info	After your initial enrollment, the only time yo The information icon provides you with addi The Select button next to an event means it	tional information about you	ur enrollment.	nrollment or a qualified family status change. on to begin your enrollment.
🕉 Benefits Enrollment	Note: Some events may be temporarily clos	ed until you have complete	ed enrollment for a prior ev	ent.
	Your Benefit Events			
Benefit Statements				
Benefit Statements	Event Description ◊	Event Date 🜣	Event Status 🜣	Job Title 🜣

3. On the **Benefits Enrollment** page, click the **Start** button next to the Open Enrollment Benefit Event listed.

The **Benefits Enrollment** page displays.



Benefits Summary	Benefits Enrollment		
👸 Life Events	The Enrollment Overview displays which benefit options	s are open for edits. All of your benefit changes will be effective	the date of the open enrollment event.
Dependent/Beneficiary Info	Your Pay Period Cost \$46.00	Full Cost \$4	5.00
😼 Benefits Enrollment	Status Pending Review	Employer Cost \$32	
Eenefit Statements	Enrollment Preview Sta Submit Enrollment	atement	Medical
	Benefit Plans		
		Flex Spending Medical	Flex Spending Dependent Care

4. To complete the Benefit Enrollment process, follow Steps 4-32 from the **Benefit Enrollment New Hire** section above.