



### Completing a New Hire and Benefit Enrollment Overview

This business process is applicable to both Health Benefits Only (HBO) Agencies and localities in The Local Choice (TLC) Benefit Program.

This Job Aid provides a walkthrough of the steps a Locality HR and BA must complete to complete a new hire processing and the benefit enrollments on behalf of the employee and assumes the employee submits a benefit enrollment form to the BA with all the information necessary to complete the process.

All required information must be entered using the tabs on the page or the transaction cannot be saved.

Ensure the job aid is followed carefully as entering incorrect or missing information in personal data fields will cause significant impact to downstream payroll and benefits processes. (i.e., Anthem, Aetna, and VRS).

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## Adding a New Hire

Before beginning, the applicable employee's Social Security Number (SSN) must be available for immediate reference. This process is performed to validate that the new employee is not currently in the Cardinal system, or to obtain the existing Employee ID if the employee is already in the system.

1. Navigate to the **Add a Person** page using the following path to search for matching persons:

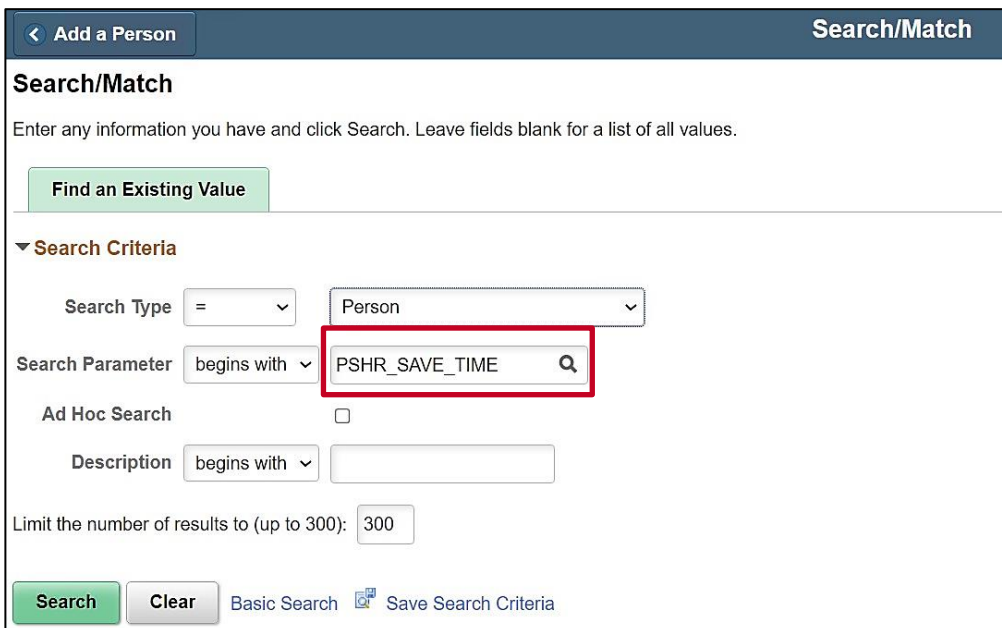
**Navigator > Workforce Administration > Personal Information > Add a Person**

The **Add a Person** page displays.



2. Click the **Search for Matching Persons** link.

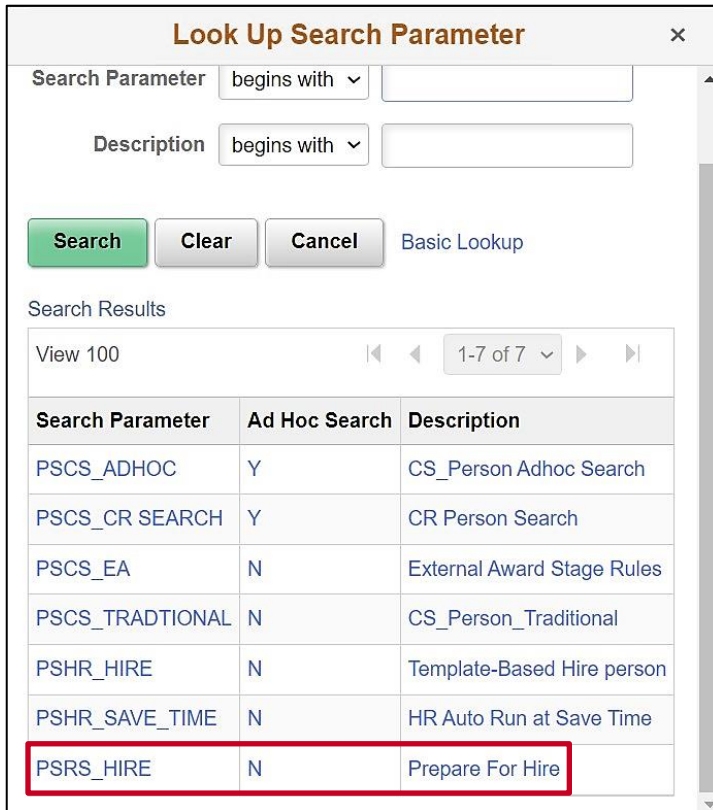
The **Search/Match** search page displays.



**Note:** To get past this page, you can click **Clear** and then **Search**. Or you can follow the steps below.

3. Click on the **Look Up** icon (magnifying glass) next to **Search Parameter**.

The **Search Parameter** look up displays.



**Look Up Search Parameter** [X]

Search Parameter begins with [ ]

Description begins with [ ]

[Search] [Clear] [Cancel] Basic Lookup

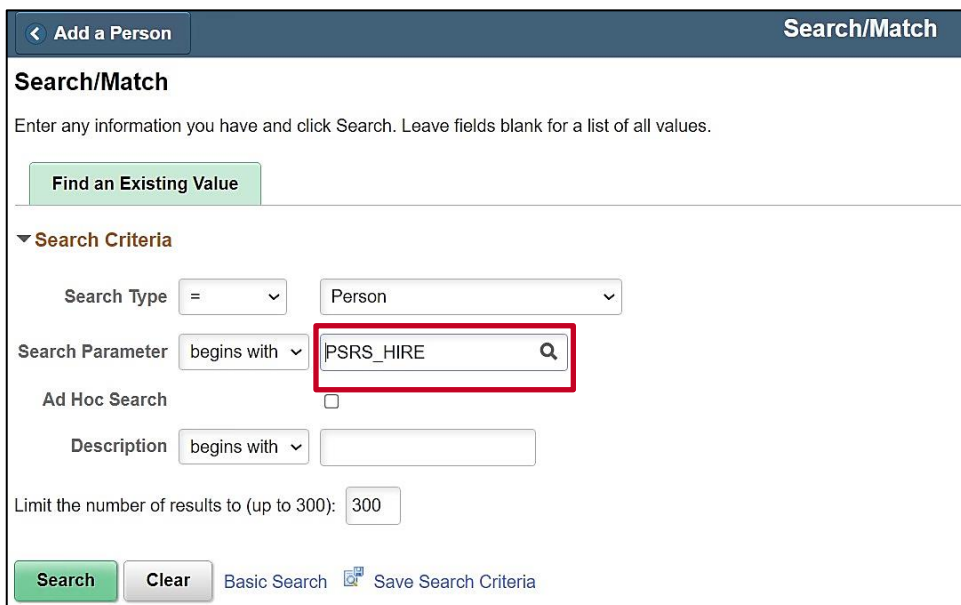
Search Results

View 100 [1-7 of 7]

Search Parameter	Ad Hoc Search	Description
PSCS_ADHOC	Y	CS_Person Adhoc Search
PSCS_CR SEARCH	Y	CR Person Search
PSCS_EA	N	External Award Stage Rules
PSCS_TRADITIONAL	N	CS_Person_Traditional
PSHR_HIRE	N	Template-Based Hire person
PSHR_SAVE_TIME	N	HR Auto Run at Save Time
PSRS_HIRE	N	Prepare For Hire

4. Select the **PSRS\_HIRE** value.

The **Search/Match** page refreshes with the updated **Search Parameter**.



< Add a Person Search/Match

**Search/Match**

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

[Find an Existing Value]

▼ Search Criteria

Search Type = [Person]

Search Parameter begins with [PSRS\_HIRE] [Q]

Ad Hoc Search

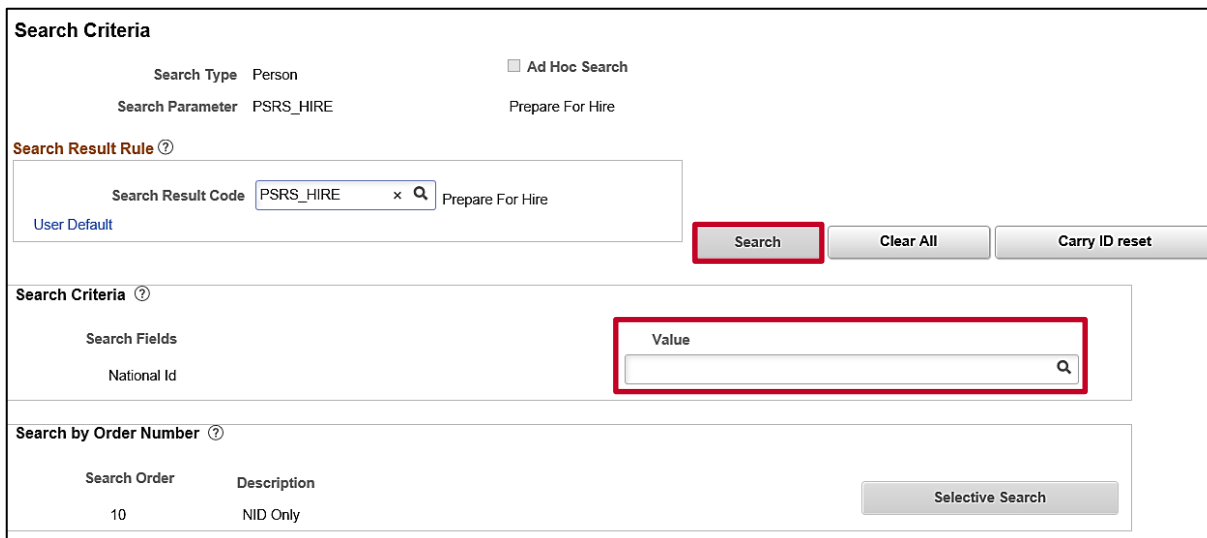
Description begins with [ ]

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

[Search] [Clear] Basic Search [Save Search Criteria]

5. Click the **Search** button.

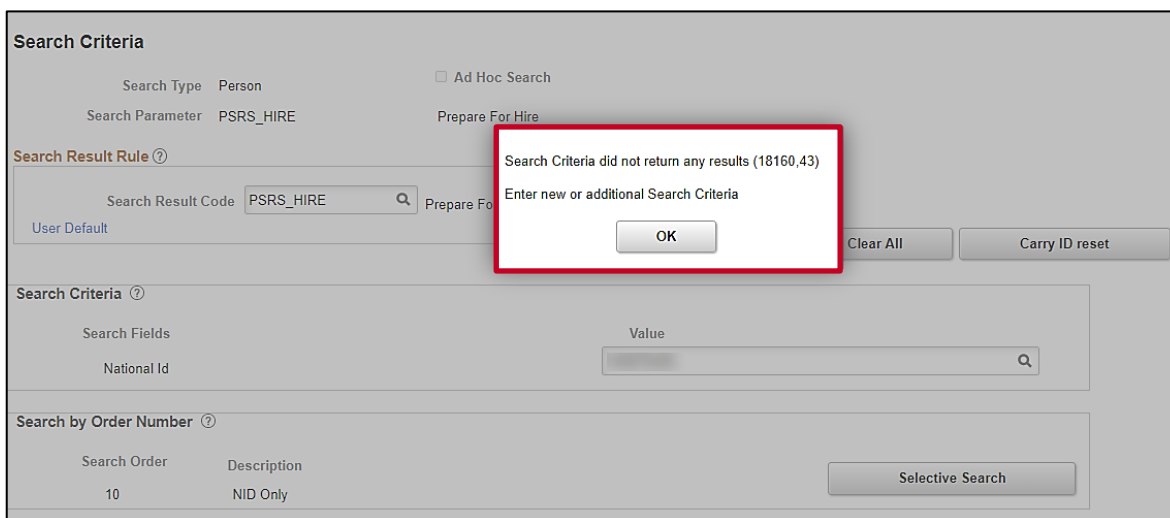
The **Search/Match** page displays.



The screenshot shows the 'Search Criteria' page. At the top, 'Search Type' is set to 'Person' and 'Search Parameter' is 'PSRS\_HIRE'. There is an unchecked checkbox for 'Ad Hoc Search' and a 'Prepare For Hire' button. Below this is the 'Search Result Rule' section, which contains a text input field with 'PSRS\_HIRE' and a search icon, and a 'Prepare For Hire' button. A 'User Default' link is also present. To the right of the input field are three buttons: 'Search' (highlighted with a red box), 'Clear All', and 'Carry ID reset'. Below the 'Search Result Rule' is another 'Search Criteria' section with a 'Search Fields' table and a 'Value' input field (highlighted with a red box). The 'Search Fields' table has one row: 'National Id'. Below this is the 'Search by Order Number' section, which has a table with one row: '10' under 'Search Order' and 'NID Only' under 'Description'. A 'Selective Search' button is located to the right of this table.

6. Enter the employee's SSN into the **Value** field.
7. Press the **Tab** key on the keyboard to enable the **Search** button.
8. The SSN is reformatted automatically (i.e., dashes are removed if they were entered). Click the **Search** button.

The **Search Results** page displays in a pop-up window.

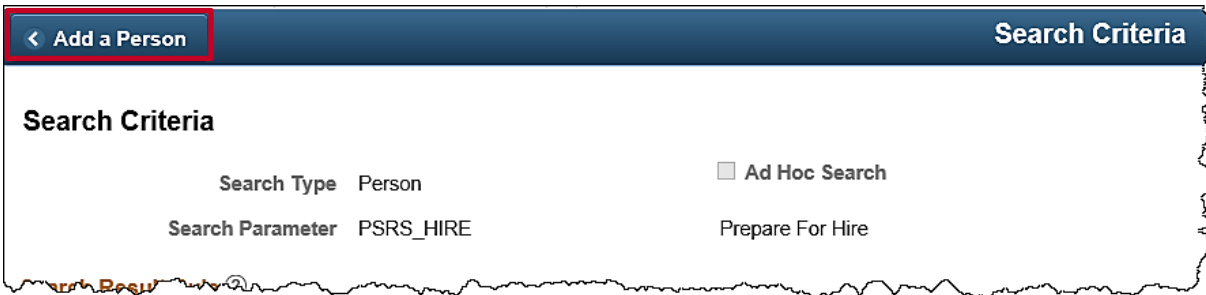


The screenshot shows the 'Search Results' page, which is dimmed. A white pop-up message box is centered on the screen, containing the text: 'Search Criteria did not return any results (18160,43)' and 'Enter new or additional Search Criteria'. Below the text is an 'OK' button (highlighted with a red box). The background shows the same 'Search Criteria' page as in the previous screenshot, but it is faded out.

**Note:** The message depicted above displays when the employee's SSN is not already in the Cardinal system. In these cases, proceed to the next step of this Job Aid. If the system displays an Employee ID, the employee already exists in the Cardinal system and a termination of the previous record should be completed by the sending Agency/Locality.

9. Click the **Ok** button to close the pop-up window.

The **Search Criteria** page returns.



10. Click the **Add a Person** tab in the top left-hand corner of the page.

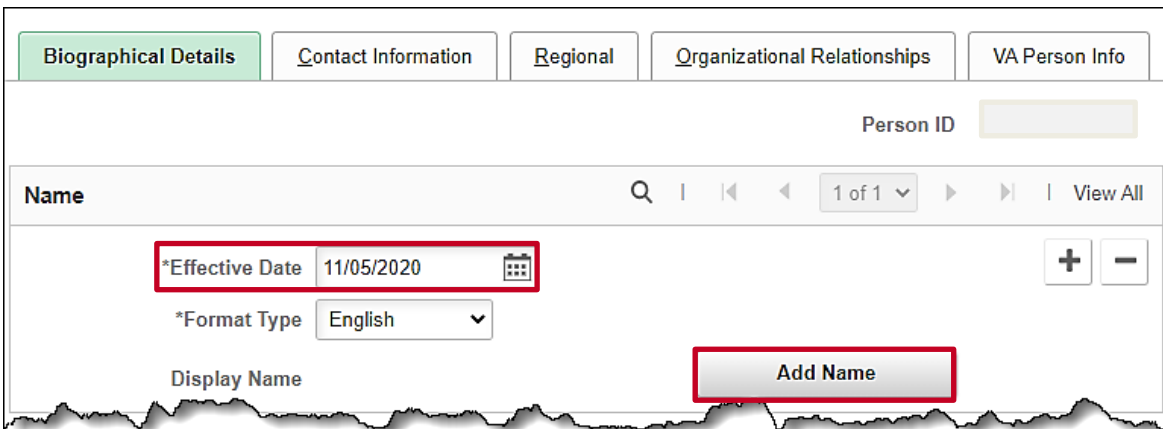
The **Add a Person** page returns.



11. Person ID defaults to “NEW”. Leave this as-is.

12. Click the **Add Person** button.

The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

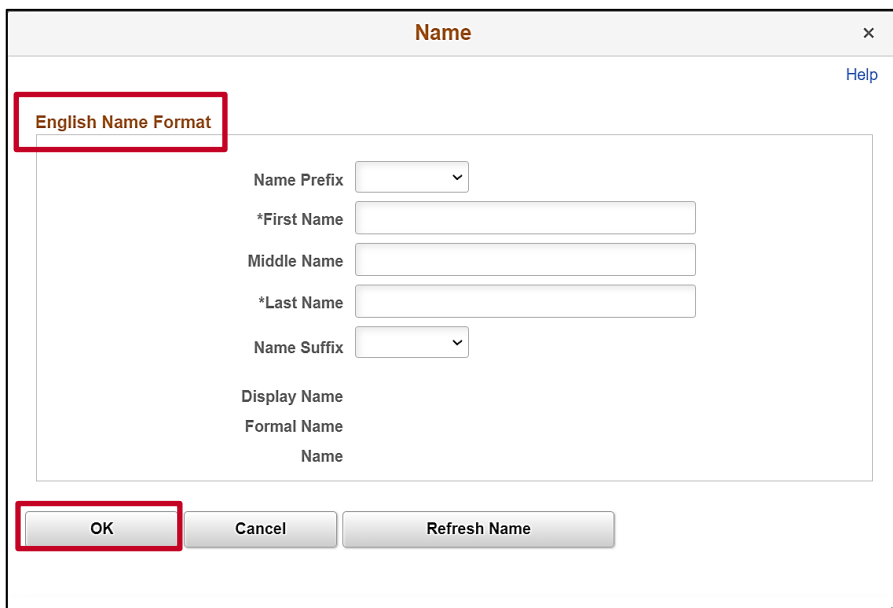


13. The **Effective Date** field defaults to the current date. Update this date to the applicable date of the new hire using the **Calendar** icon if required.

**Note:** For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

14. Click the **Add Name** button.

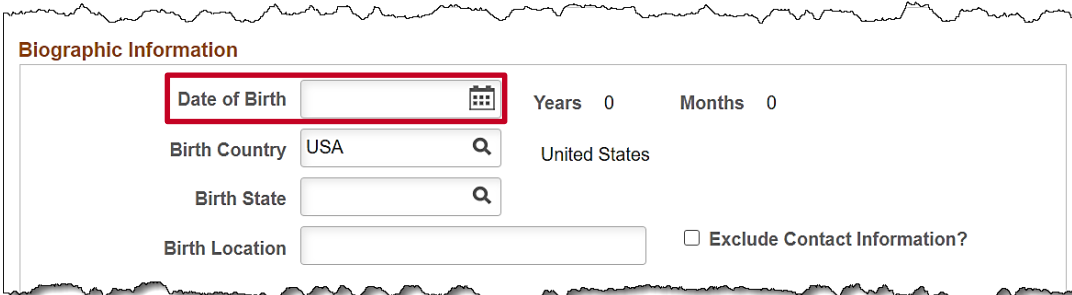
The **Name** page displays in a pop-up window.



15. Select the applicable prefix using the **Name Prefix** field dropdown button (optional).
16. Enter the employee's first name in the **First Name** field (required).
17. Enter the employee's middle name in the **Middle Name** field (optional).  
**Note:** If using middle initials, please refrain from entering a period (e.g., enter John M Doe instead of John M. Doe)
18. Enter the employee's last name in the **Last Name** field (required).
19. Select the applicable suffix using the **Name Suffix** field dropdown button (optional).  
**Note:** Suffixes should only go in the Suffix field and not in the Last Name field.
20. Click the **Refresh Name** button. The **Display Name**, **Formal Name**, and **Name** fields will auto-populate based on the information entered.
21. Click the **OK** button.

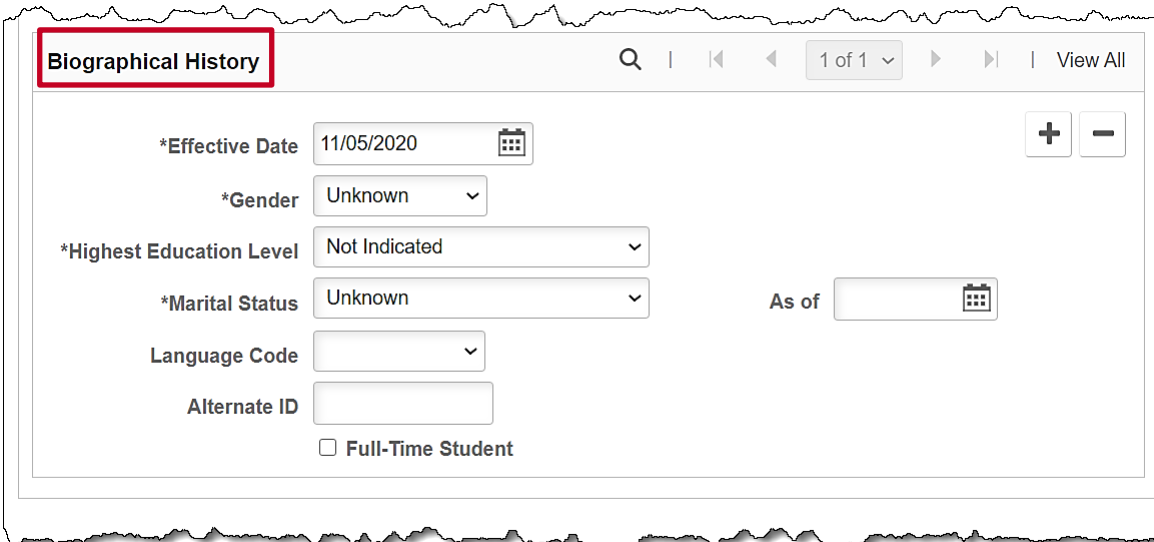
**BN361 Completing a New Hire and Benefit Enrollment**

The **Modify a Person** page returns. Scroll down to the **Biographic Information** section as required.



22. Select the employee's date of birth (required) using the **Date of Birth Calendar** icon.
23. The **Birth Country** field defaults to "USA". Update as needed using the **Look Up** icon.
24. The **Birth State** and **Birth Location** are not utilized in Cardinal.
25. Scroll down to the **Biographical History** section.

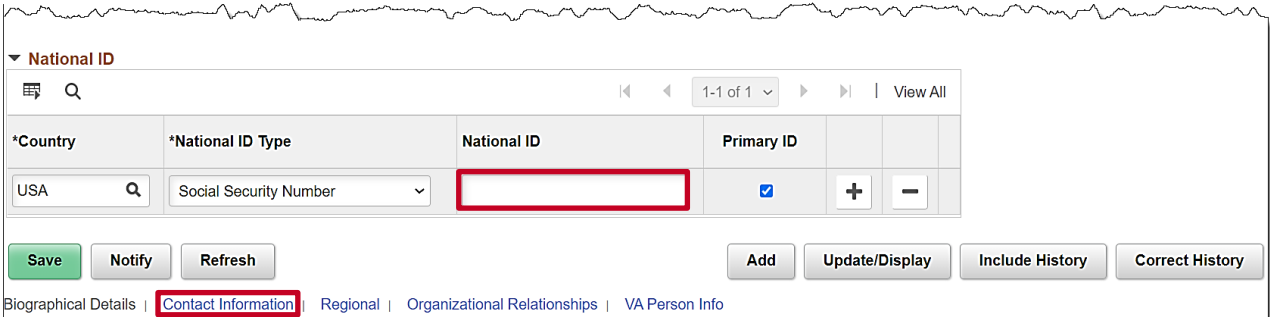
The **Biographical History** section displays.



26. The **Gender** field is a required field for benefits purposes and defaults to "Unknown". Select the legal gender of the employee using the dropdown button.
27. The **Highest Education Level** field is a required field and defaults to "Not Indicated". Select the employee's highest level of education using the dropdown button.
28. The **Marital Status** field is a required field for benefits purposes and defaults to "Unknown". Select the legal marital status of the employee using the dropdown button to prevent errors from being reported on audit reports.
29. The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.

30. Scroll down to the **National ID** section as needed.

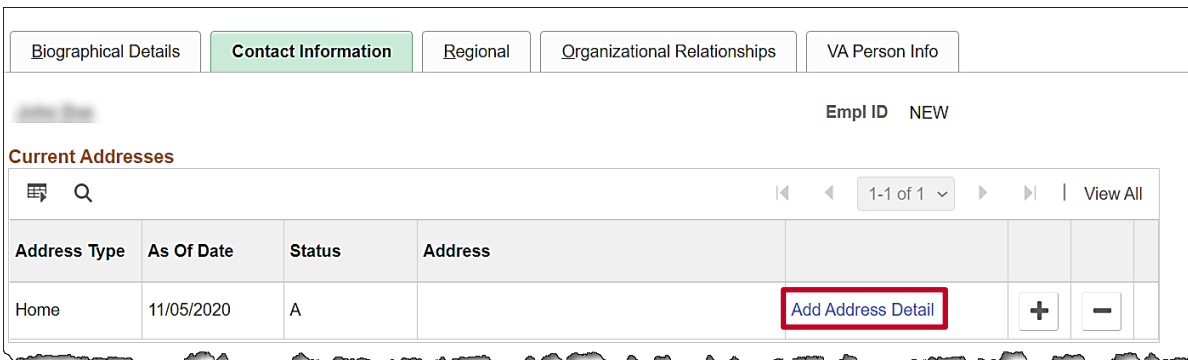
The **National ID** section displays.



31. Enter the employee's SSN in the **National ID** field.

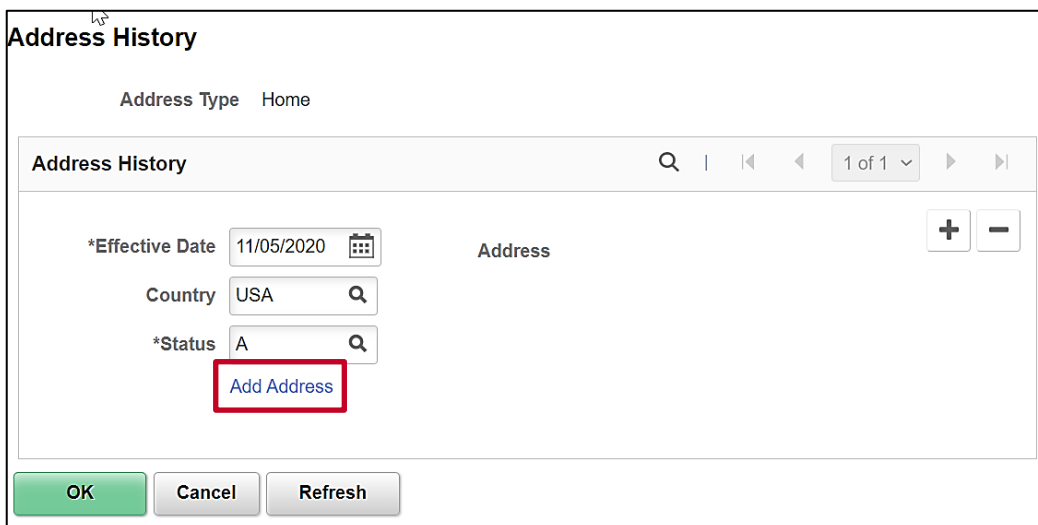
32. Click the **Contact Information** link.

The **Contact Information** tab displays.



33. Click the **Add Address Detail** link.

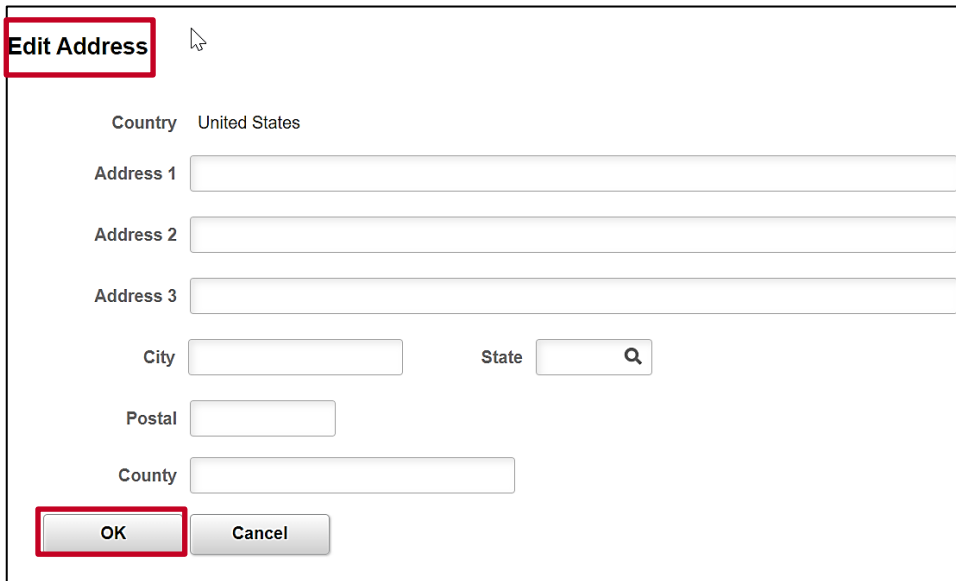
The **Address History** page displays.





34. Click the **Add Address** link.

The **Edit Address** page displays.



**Edit Address**

Country United States

Address 1

Address 2

Address 3

City  State

Postal

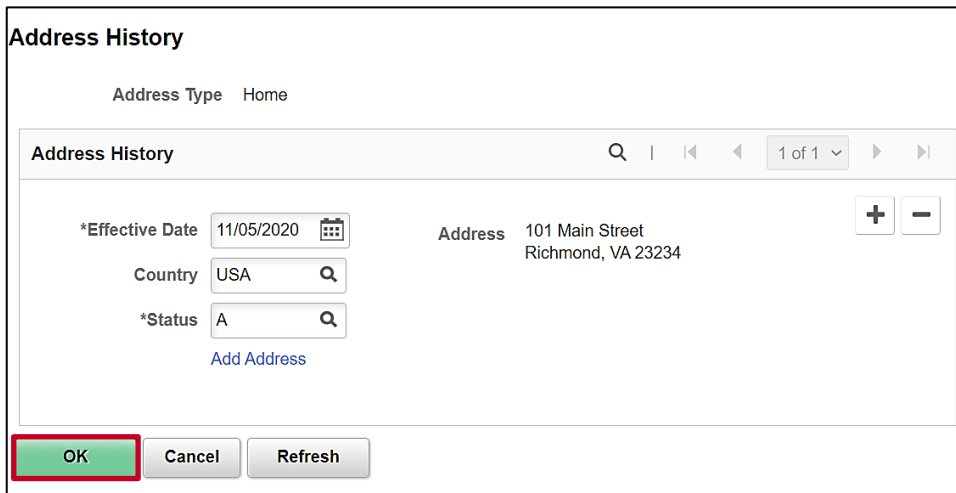
County

**OK** Cancel

35. Enter the employee's complete address information using the applicable fields. **Address 1**, **City**, **State**, and **Postal** are all required fields. The others are optional.

36. Click the **OK** button.

The **Address History** page returns with the address information displayed.



**Address History**

Address Type Home

Address History  | << < 1 of 1 > >>

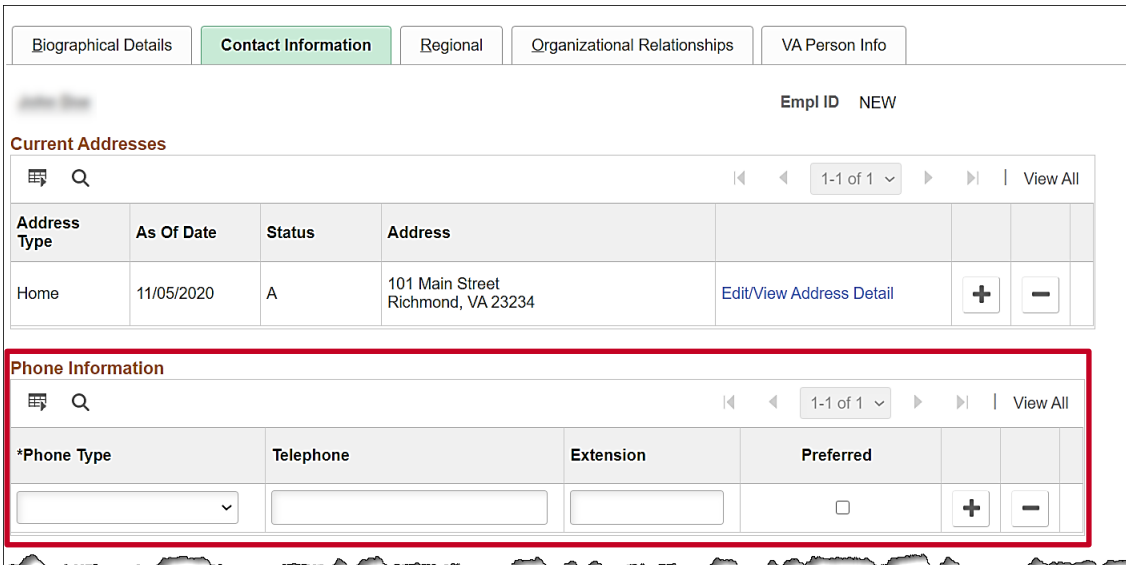
*Effective Date	11/05/2020	Address	101 Main Street Richmond, VA 23234
Country	USA		
*Status	A		

[Add Address](#)

**OK** Cancel Refresh

37. Click the **OK** button.

The **Contact Information** tab returns.



Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

Empl ID NEW

**Current Addresses**

Address Type	As Of Date	Status	Address			
Home	11/05/2020	A	101 Main Street Richmond, VA 23234	<a href="#">Edit/View Address Detail</a>	+	-

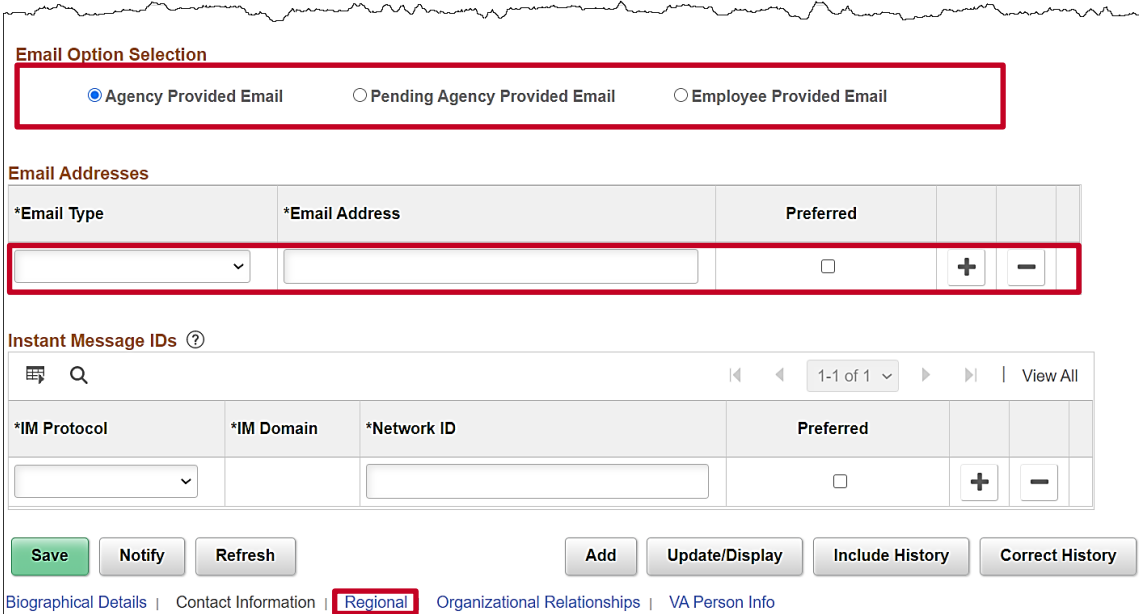
**Phone Information**

*Phone Type	Telephone	Extension	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

38. Select the type of phone using the **Phone Type** field dropdown button.
39. Enter the applicable telephone number in the **Telephone** field.
 

**Note:** It is not necessary to enter dashes. When you tab out of the field, the appropriate phone number format will auto-populate.
40. Select the **Preferred** checkbox option if applicable.
41. Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (+), and then repeating Steps 37 – 39.
42. Scroll down to the **Email Option Selection** and **Email Addresses** sections.

The **Email Option Selection** and **Email Addresses** sections display.



**Email Option Selection**

Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

**Email Addresses**

*Email Type	*Email Address	Preferred		
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	+	-

**Instant Message IDs**

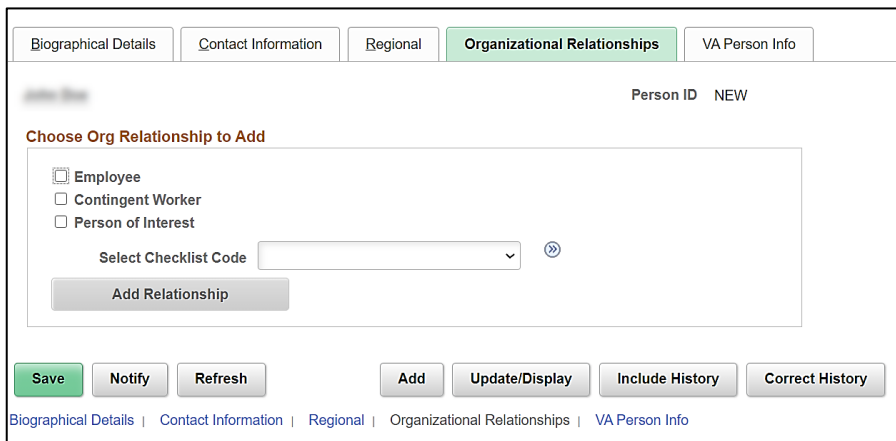
[Biographical Details](#) | 
 [Contact Information](#) | 
 [Regional](#) | 
 [Organizational Relationships](#) | 
 [VA Person Info](#)

43. Complete the **Email Option Selection** and **Email Addresses** sections based on the following guidelines:
  - a. If the employee has been issued a business email:
    - i. Accept the default email option of “Agency Provided Email”
    - ii. Select an email type of “Business” using the **Email Type** field drop-down button
    - iii. Enter the applicable email address in the **Email Address** field
    - iv. Select the **Preferred** checkbox option
  - b. If the employee’s business email has been requested but not yet assigned:
    - i. Select the “Pending Agency Provided Email” email option by clicking the corresponding radio button option
    - ii. Select an email type of “Business” using the **Email Type** field drop-down button
    - iii. Enter [Noemail@virginia.gov](mailto:Noemail@virginia.gov)
    - iv. Select the **Preferred** checkbox option
  - c. If a business email will not be provided to the employee:
    - i. Select the “Employee Provided Email” email option by clicking the corresponding radio button option
    - ii. Select an email type of “Personal” using the **Email Type** field drop-down button
    - iii. Enter the applicable email address in the **Email Address** field
    - iv. Select the **Preferred** checkbox option

44. Click the **Organizational Relationships** tab.

The **Organizational Relationships** tab displays.

**Note:** Localities do not utilize the Regional or VA Person Info tabs.

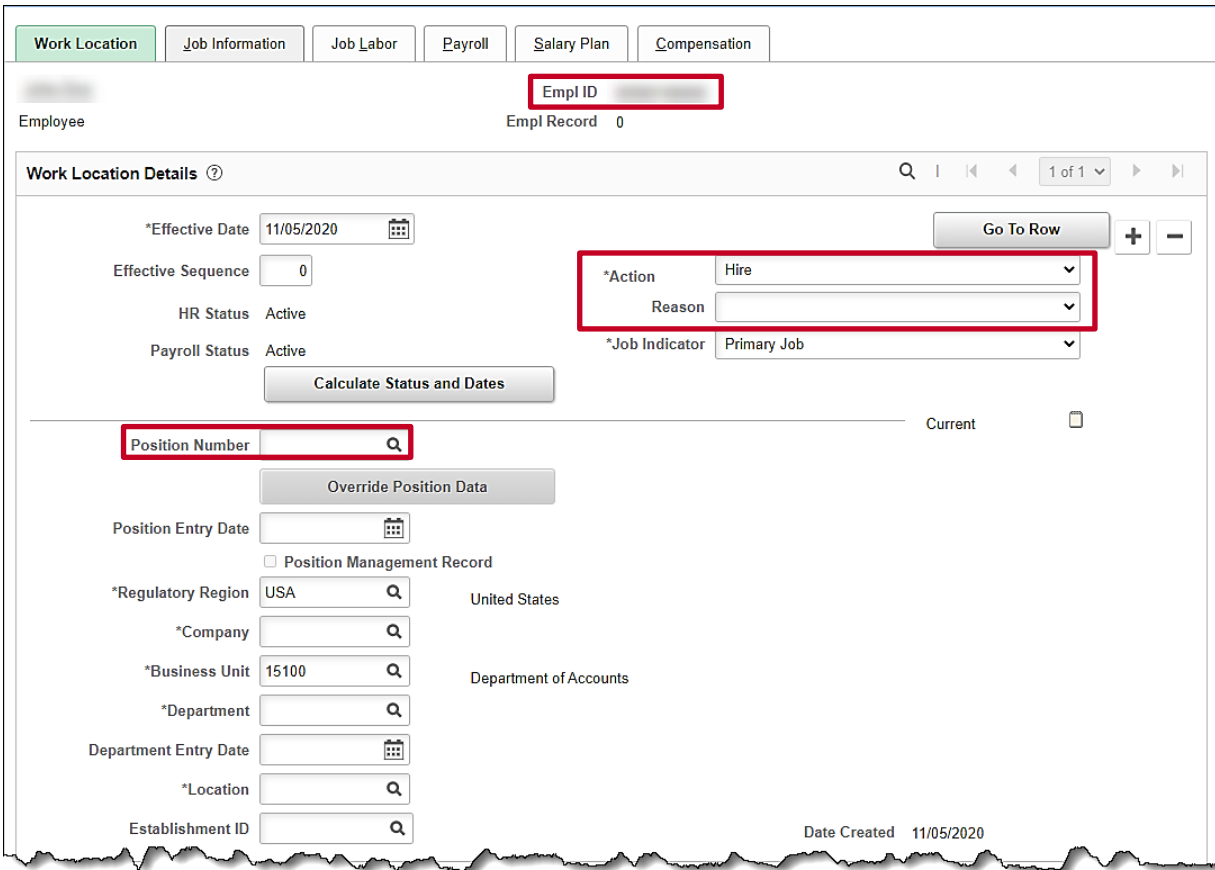


The screenshot shows a web application interface with a tabbed menu at the top. The tabs are: Biographical Details, Contact Information, Regional, **Organizational Relationships** (highlighted in green), and VA Person Info. Below the tabs, there is a header area with a person ID 'NEW'. The main content area is titled 'Choose Org Relationship to Add' and contains three checkboxes:  Employee,  Contingent Worker, and  Person of Interest. Below these is a dropdown menu labeled 'Select Checklist Code' with a search icon. At the bottom of this section is an 'Add Relationship' button. Below the main content area is a row of buttons: Save (green), Notify, Refresh, Add, Update/Display, Include History, and Correct History. At the very bottom is a breadcrumb trail: [Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#).

45. Select the **Employee** checkbox option.

46. Click the **Add Relationship** button.

The new employee's **Job Record** page displays with the **Work Location** tab displayed by default.



47. The **Effective Date** field defaults to the date entered on the **Personal Information** page. This is a required field. Validate that this date is the first date of employment for the employee (correcting if necessary) prior to saving the job record. A help desk ticket request is required to adjust the new employee's effective date after their job record is created and saved.

**Note:** For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

48. Review the **Empl ID** field and make note of the assigned Employee ID.
49. The **Action** field defaults to "Hire"; no other selections are available.
50. Select "New Hire" in the **Reason** field using the dropdown button.
51. Select the applicable pooled position for the employee using the **Position Number Look Up** icon.



# HR and Benefits Job Aid

## BN361 Completing a New Hire and Benefit Enrollment

The **Work Location** tab refreshes and auto-populates based off the selected Position Number.

**Work Location** | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]  
Empl Record: 0

**Work Location Details** (1 of 1)

\*Effective Date: 11/05/2020  + -

Effective Sequence: 0 \*Action: Hire

HR Status: Active Reason: New Hire

Payroll Status: Active \*Job Indicator: Primary Job

Position Number: BCCHR002 Security Manager I

Position Entry Date: 11/05/2020  Position Management Record

Regulatory Region: USA United States

Company: BCC Bland Correctional Center

Business Unit: 71800 Bland Correctional Center

Department: 100 BLAND CORRECTIONAL CENTER

Department Entry Date: 11/05/2020

Location: CENTR Dept of Corrections

Establishment ID: DOC Dept of Corrections Date Created: 11/12/2020

52. Click the **Job Information** tab.

The **Job Information** tab displays.

Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]  
Empl Record: 0

**Job Information Details** (1 of 1)

Effective Date: 11/05/2020

Effective Sequence: 0 Action: Hire

HR Status: Active Reason: New Hire

Payroll Status: Active Job Indicator: Primary Job

Current

Job Code: 96615 Security Manager I

Entry Date: 11/05/2020 SOC Code

Supervisor Level: Supervisor Name

Reports To: DOCHR001 Test-Director of Corrections 00900018800 Billy Cryrus

Regular/Temporary: Regular Full/Part: Part-Time

**Empl Class**  **\*Officer Code**

Regular Shift: Not Applicable Shift Rate:

Classified Ind: Unclassified Shift Factor:

53. Review the information within the **Job Information Details** section.



## BN361 Completing a New Hire and Benefit Enrollment

- 54. Select the applicable employee class using the **Empl Class** field dropdown button. This is a required field.
  - a. If the employee is assigned to a TLC position, select the “TLC EE” value.
  - b. If the employee is assigned to an HBO position, select the value that describes the employee filling the job. (i.e., ONC, OTO, etc.)
- 55. The **Officer Code** field defaults to “None”. Do not change.
- 56. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.

The **Payroll** tab displays.

- 57. The **Payroll System** field defaults to” Payroll for North America”. Do not change.
- 58. The **Absence System** field defaults to “Other”. Do not change.
- 59. Select “MNP Non-Payroll” using the **Pay Group Look Up** icon.



# HR and Benefits Job Aid

## BN361 Completing a New Hire and Benefit Enrollment

The **Payroll** tab refreshes automatically.

Work Location | Job Information | Job Labor | **Payroll** | **Salary Plan** | Compensation

Employee: [Redacted] Empl ID: [Redacted] Empl Record: 0

**Payroll Information** 1 of 1

Effective Date: 11/05/2020 [Go To Row](#)

Effective Sequence: 0 Action: Hire  
HR Status: Active Reason: New Hire  
Payroll Status: Active Job Indicator: Primary Job

\*Payroll System: Payroll for North America  
Absence System: Other

**Payroll for North America**

Pay Group: MNP Non-Payroll  
**Employee Type: S Salaried**  
**Tax Location Code**  
GL Pay Type:   
Holiday Schedule: NOHOL LOCALITY  
FICA Status: Subject [Edit ChartFields](#)

60. The **Employee Type** field defaults to “S” (Salaried). Do not change.
61. The **Holiday Schedule** field defaults to “NOHOL”. Do not change.
62. Select the applicable Tax Location Code based on the location of the office using the **Tax Location Code Look Up** icon.
63. Click the **Salary Plan** tab.





# HR and Benefits Job Aid

## BN361 Completing a New Hire and Benefit Enrollment

The **Salary Plan** tab displays.

The screenshot shows the 'Salary Plan' tab in an HR system. The 'Compensation' sub-tab is highlighted in red. The 'Salary Admin Plan' field is also highlighted in red and displays 'UG' (Ungraded). Other fields include Effective Date (11/05/2020), Effective Sequence (0), HR Status (Active), Payroll Status (Active), Action (Hire), Reason (New Hire), Job Indicator (Primary Job), and a 'Current' checkbox. A 'Go To Row' button is visible. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons, and a breadcrumb trail: Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation.

64. Validate that the **Salary Admin Plan** field defaults to “UG” (Ungraded).

**Note:** If the **Salary Admin Plan** does not default to “UG,” then the wrong position number was used. Double-check the position number used on the **Work Location** tab before proceeding.

65. Click the **Compensation** tab.



# HR and Benefits Job Aid

## BN361 Completing a New Hire and Benefit Enrollment

The **Compensation** tab displays.

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Employee [Redacted] Empl ID [Redacted]  
Empl Record 0

**Compensation Details** ②

Effective Date 11/05/2020 Go To Row  
Effective Sequence 0 Action Hire  
HR Status Active Reason New Hire  
Payroll Status Active Job Indicator Primary Job

Compensation Rate 0.000000 \*Frequency A Annual

▶ **Comparative Information** ②  
▶ **Pay Rates** ②

**Default Pay Components**

**Pay Components** ②

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0					+	-

**Calculate Compensation**

Job Data | Employment Data | Earnings Distribution | **Benefits Program Participation**

OK | Cancel | Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

- 66. The **Frequency Code** field defaults to “A” (Annual). Do not change.
- 67. Click the **Default Pay Components** button.
- 68. Select “NAANNL” in the **Rate Code** field using the **Rate Code Look Up** icon within the **Pay Components** section.
- 69. Enter “0” in the **Compensation Rate** field. (Payroll is not processed in Cardinal).
- 70. The **Currency** and **Frequency** fields default based on the Rate Code entered/selected. Do not change.
- 71. Click the **Calculate Compensation** button.
- 72. Click the **Benefits Program Participation** link.



# HR and Benefits Job Aid

## BN361 Completing a New Hire and Benefit Enrollment

The **Benefits Program Participation** page displays.

**Benefit Program Participation**

Employee [redacted] Empl ID [redacted]  
Empl Record 0

**Benefit Status** ?  |

Benefit Record Number 0

Effective Date 11/05/2020  
Effective Sequence 0  
HR Status Active  
Payroll Status Active

Action Hire  
Reason New Hire  
Job Indicator Primary Job

\*Benefits System    
Annual Benefits Base Rate  USD  
Benefits Employee Status Active  
ACA Eligibility Details

**Benefits Administration Eligibility** ?

BAS Group ID <input type="text"/>	Elig Fld 2 <input type="text"/>	Elig Fld 3 <input type="text"/>
Elig Fld 1 <input type="text"/>	Elig Fld 5 <input type="text"/>	Elig Fld 6 <input type="text"/>
Elig Fld 4 <input type="text"/>	Elig Fld 8 <input type="text"/>	Elig Fld 9 <input type="text"/>
Elig Fld 7 <input type="text"/>		

**Benefit Program Participation Details** ?  |

\*Effective Date   Currency Code USD

\*Benefit Program   Sys delivered empty Ben Pgm

Job Data    Employment Data    Earnings Distribution    **Benefits Program Participation**

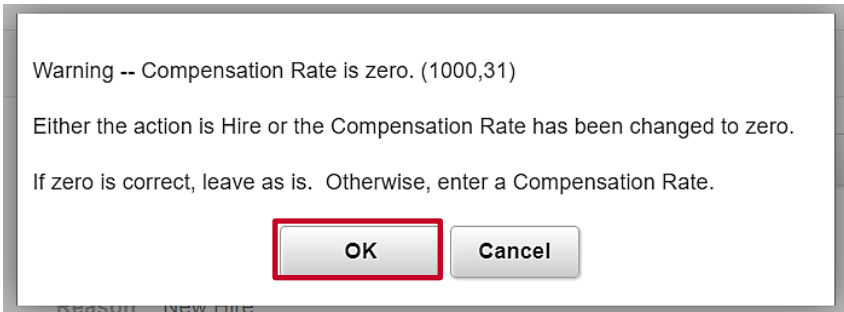
- 73. Click the **Elig Fld 2 Look Up** icon. This value will be the department number/DHRM group number. For example: for position A310000P and/or A310000F, the Elig Field 2 will be: 047039000 (the department number/DHRM group number).
- 74. Click the **Elig Fld 3 Look Up** icon and select "N" (No).
- 75. Click the **Elig Fld 8 Look Up** icon and select "12-12".
- 76. Click the **Elig Fld 9 Look Up** icon and select the applicable benefits payment breakdown. These values represent the nature of the employee and how the employee's health premiums are paid. Scroll through the list to see the valid TLC available values.

**BN361 Completing a New Hire and Benefit Enrollment**

**Note:** For further information on eligibility configuration valid values, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Training**.

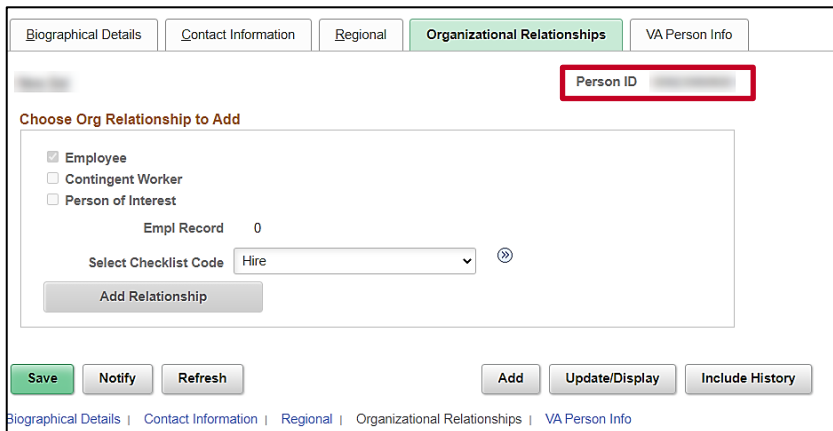
77. Click the **OK** button.

A **Warning** message displays in a pop-up window.



78. Click the **OK** button to close the **Warning** message. A Compensation Rate of zero is correct because payroll is not managed in Cardinal.

The **Organizational Relationships** page returns.

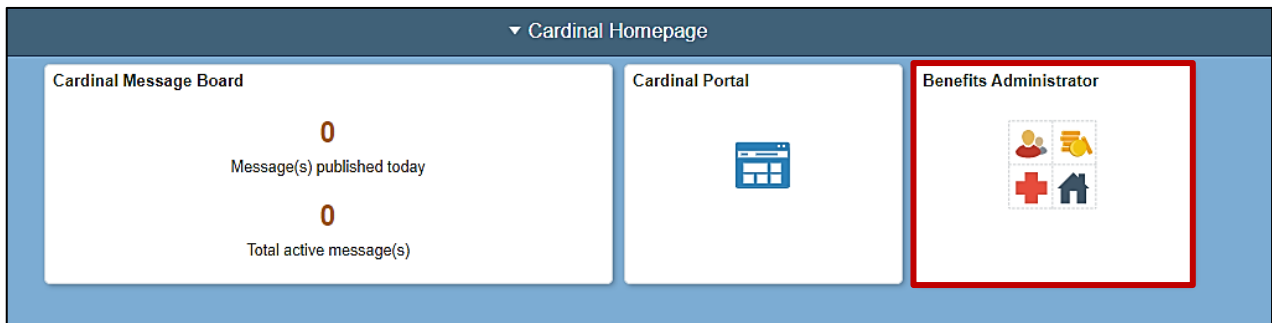


**New Hire Benefit Enrollment**

Now that the Locality HR Admin has completed the New Hire processing, the Locality BA will be able to complete the benefit enrollment elections for the new hire employee.

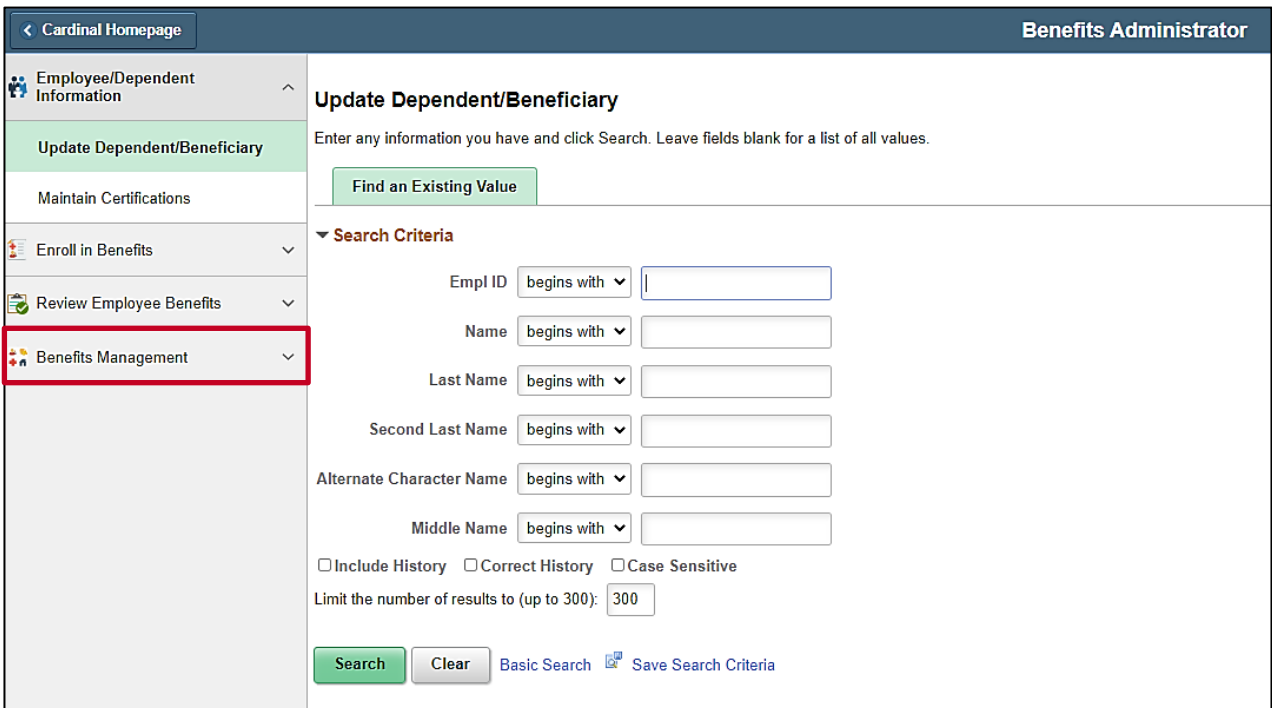
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



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

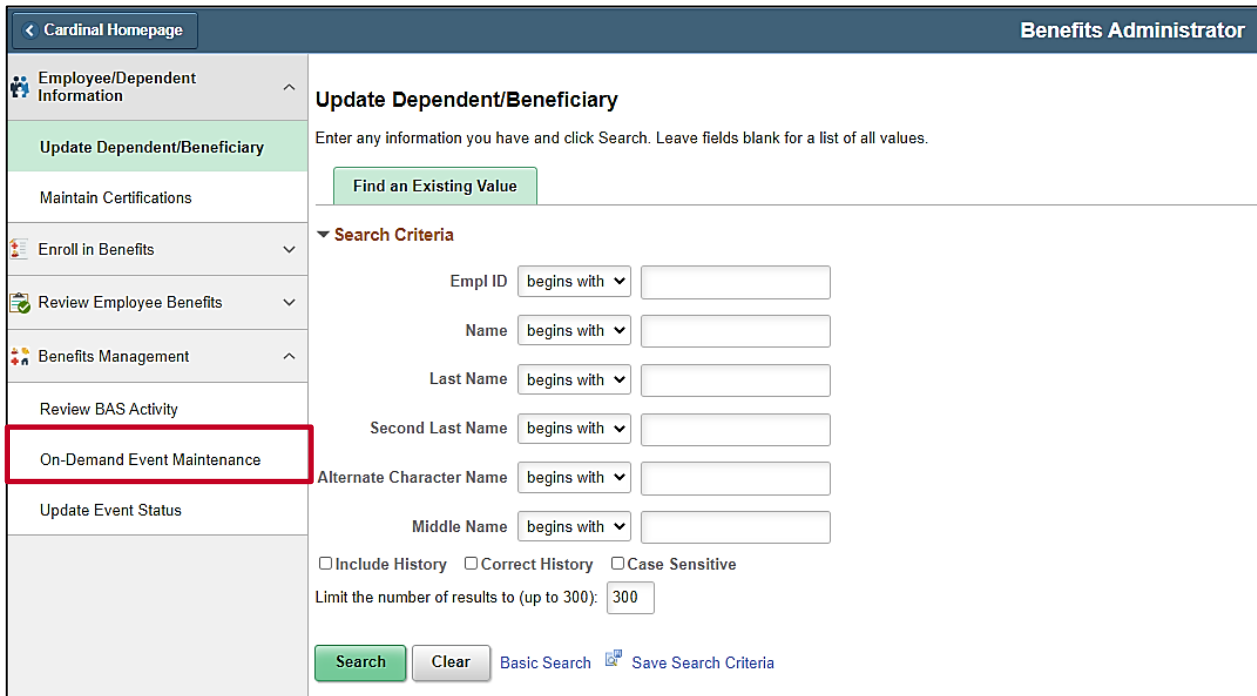
The **Update Dependent/Beneficiary** page displays.



**BN361 Completing a New Hire and Benefit Enrollment**

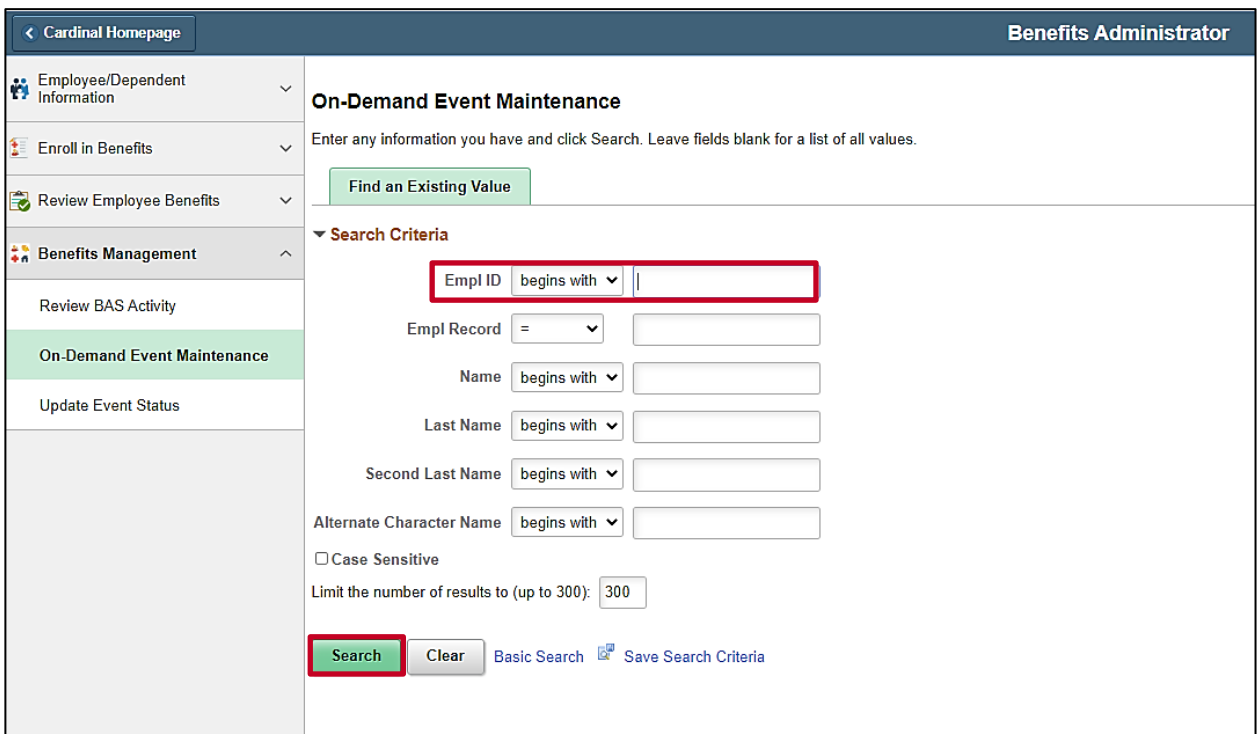
3. Click the **Benefits Management** list item on the left-hand side of the screen.

The **Benefits Management** drop down menu displays.



4. Click the **On-Demand Event Maintenance** button.

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

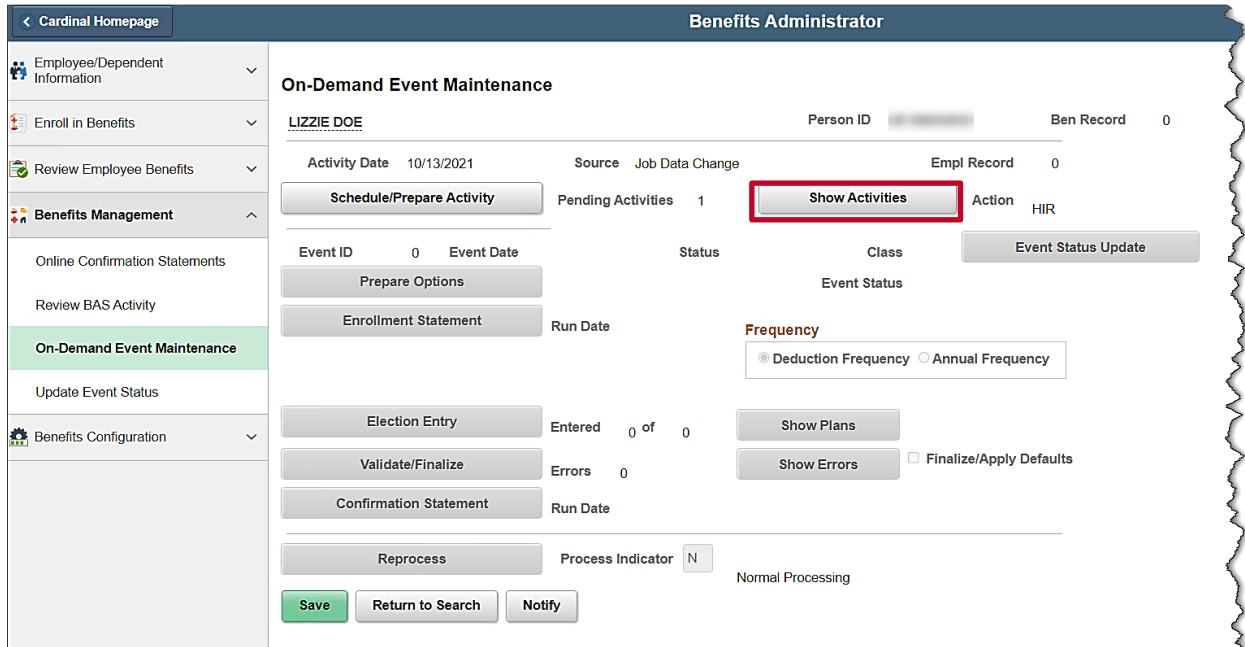


## BN361 Completing a New Hire and Benefit Enrollment

5. Enter the **Empl ID** in the search box.
6. Click the **Search** button.

The **On-Demand Event Maintenance** page displays with the employee's information.

**Note:** The Benefits Administration automated programming process prepares activities every two hours. If it has been more than two hours since the hire was entered, skip to step 11.



**On-Demand Event Maintenance**

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date 10/13/2021 Source Job Data Change Empl Record 0

**Show Activities** (highlighted) Action HIR

Event ID 0 Event Date Status Class Event Status Update

Prepare Options

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

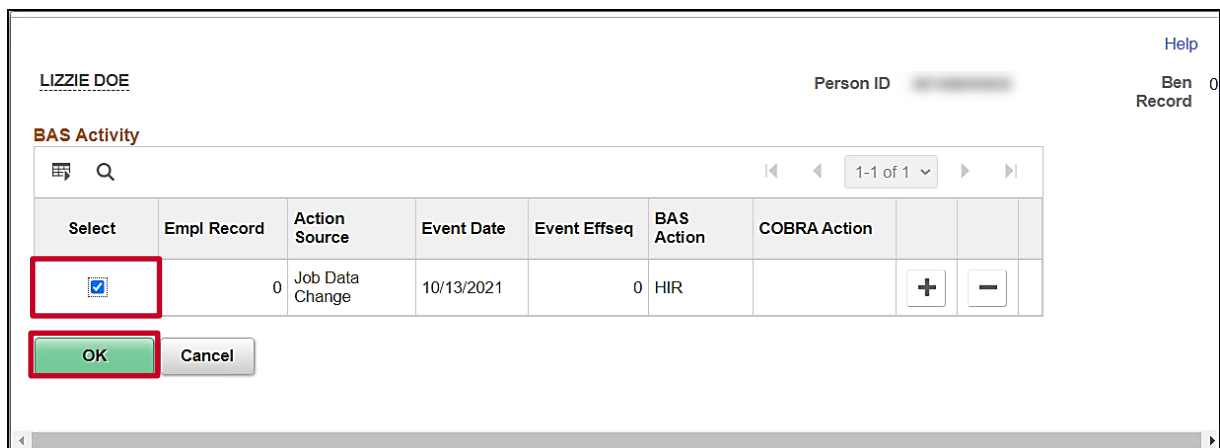
Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

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

The **Show Activities** page pop up displays.



LIZZIE DOE Person ID [REDACTED] Ben Record 0

**BAS Activity**

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
<input checked="" type="checkbox"/>	0	Job Data Change	10/13/2021	0	HIR		+	-

OK Cancel

8. Confirm that the job data change event for the HIR action is checked in the **BAS Activity** table.
9. Click **OK**.



## BN361 Completing a New Hire and Benefit Enrollment

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

**Cardinal Homepage** **Benefits Administrator**

**On-Demand Event Maintenance**

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date 10/13/2021 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** **Notify**

10. Click on the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity.

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

**Cardinal Homepage** **Benefits Administrator**

**On-Demand Event Maintenance**

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date Source Empl Record 0

**Schedule/Prepare Activity** Pending Activities 0 **Show Activities** Action

Event ID 1 Event Date 10/13/2021 Status Prepared Class HIR **Event Status Update**

**Prepare Options** Event Status Open for Processing

**Enrollment Statement** Run Date **Frequency**

Deduction Frequency  Annual Frequency

**Election Entry** Entered 0 of 1 **Show Plans**

**Validate/Finalize** Errors 0 **Show Errors**  Finalize/Apply Defaults

**Confirmation Statement** Run Date

**Reprocess** Process Indicator N **Q** Normal Processing

**Save** **Return to Search** **Notify**

11. Click the **Election Entry** button.





# HR and Benefits Job Aid

## BN361 Completing a New Hire and Benefit Enrollment

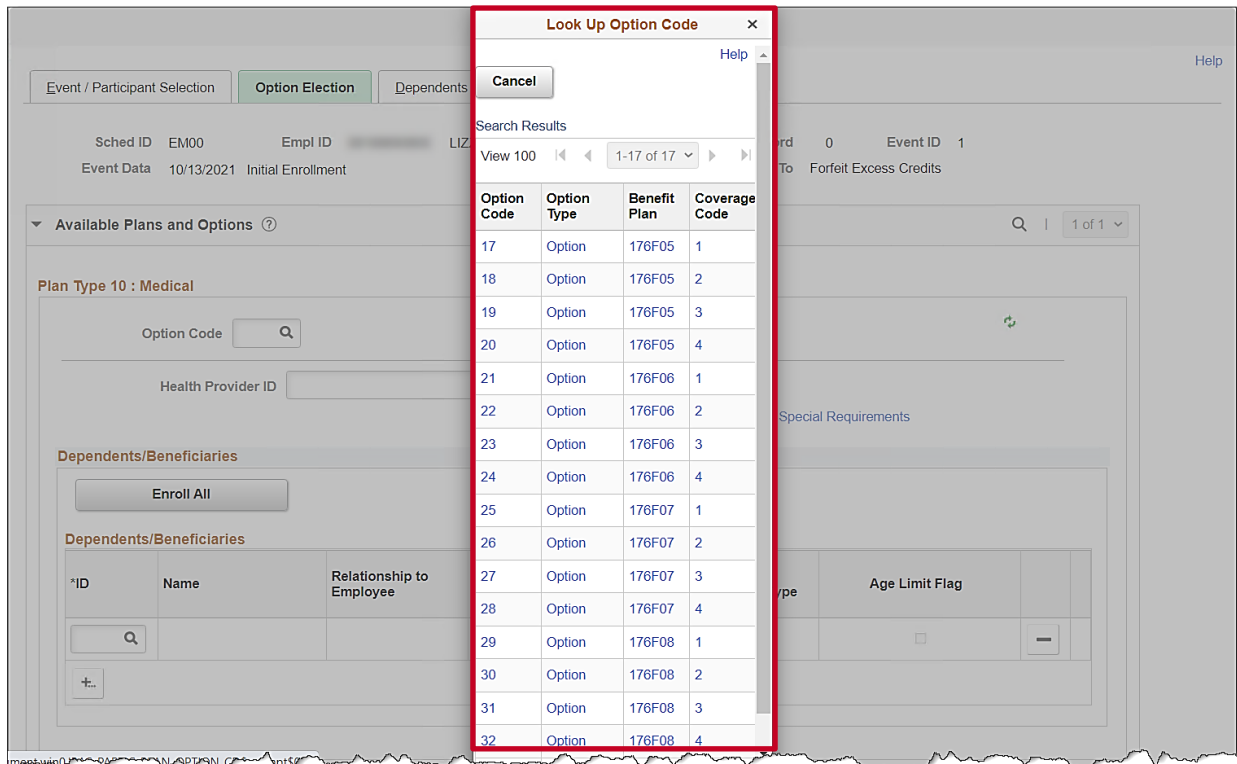
The **Election Entry** page displays.

The screenshot shows the 'BenAdmin Data Entry' application window. At the top, there are three tabs: 'Event / Participant Selection', 'Option Election' (which is selected), and 'Dependents / Beneficiaries'. Below the tabs, there is a header area with the following information: 'Sched ID EM00', 'Empl ID [REDACTED] LIZZIE DOE', 'Ben Record 0', and 'Event ID 1'. Below this, it says 'Event Data 10/13/2021 Initial Enrollment' and 'Excess Credit Rollover To Forfeit Excess Credits'. The main content area is titled 'Available Plans and Options' and shows 'Plan Type 10 : Medical'. Under this plan type, there is a search bar for 'Option Code' which is highlighted with a red box. Below the search bar, there is a 'Health Provider ID' field and a 'Previously Seen' checkbox. There is also a 'Special Requirements' link. Below this, there is a 'Dependents/Beneficiaries' section with an 'Enroll All' button. At the bottom, there is a table with the following columns: \*ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. The table is currently empty.

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

## BN361 Completing a New Hire and Benefit Enrollment

The **Medical Benefit Plan Elections Look Up** pop up displays.

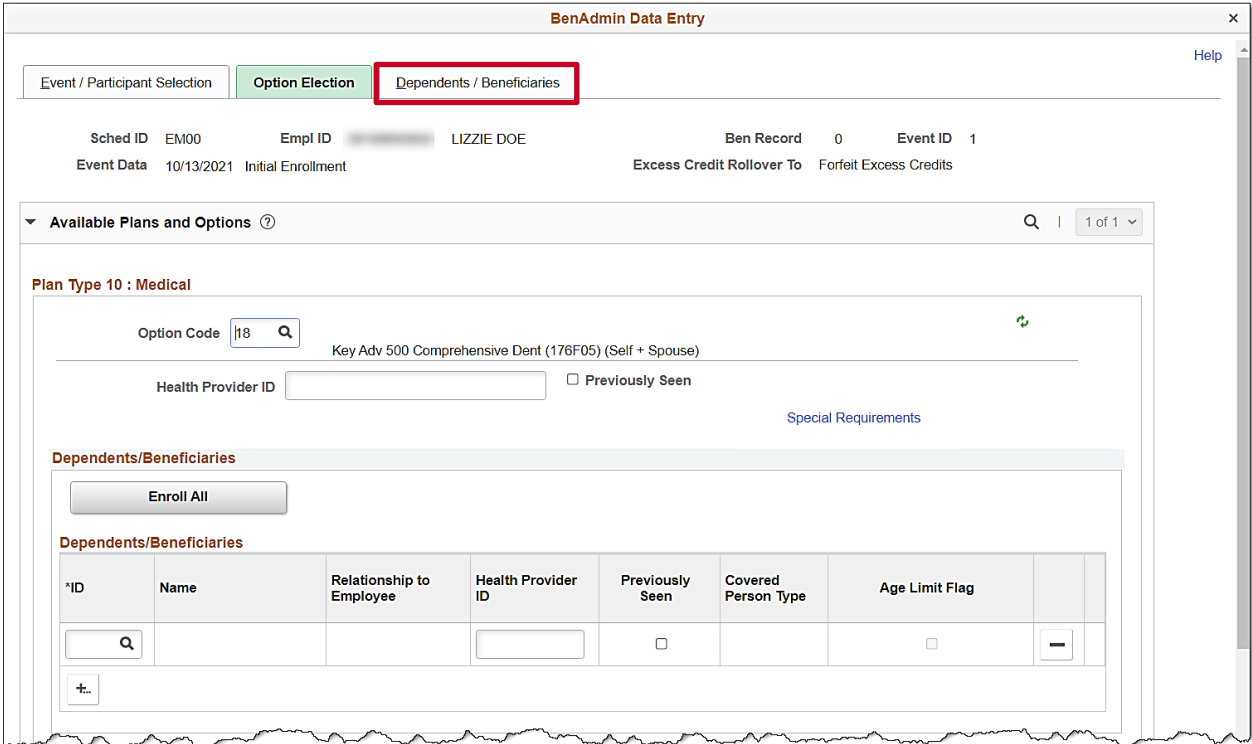


- Select the Benefit Plan and Coverage Code indicated on the enrollment form submitted by the employee. For this scenario, we will select a Benefit Plan with **Coverage Code 2**, for Employee + Spouse coverage.

**Note:** The coverage codes are: 1 – Single Coverage, 2 – Employee + Spouse, 3 – Employee + Child, and 4 – Employee + 2 or More Dependents (Family).

The **Election Entry** page returns.

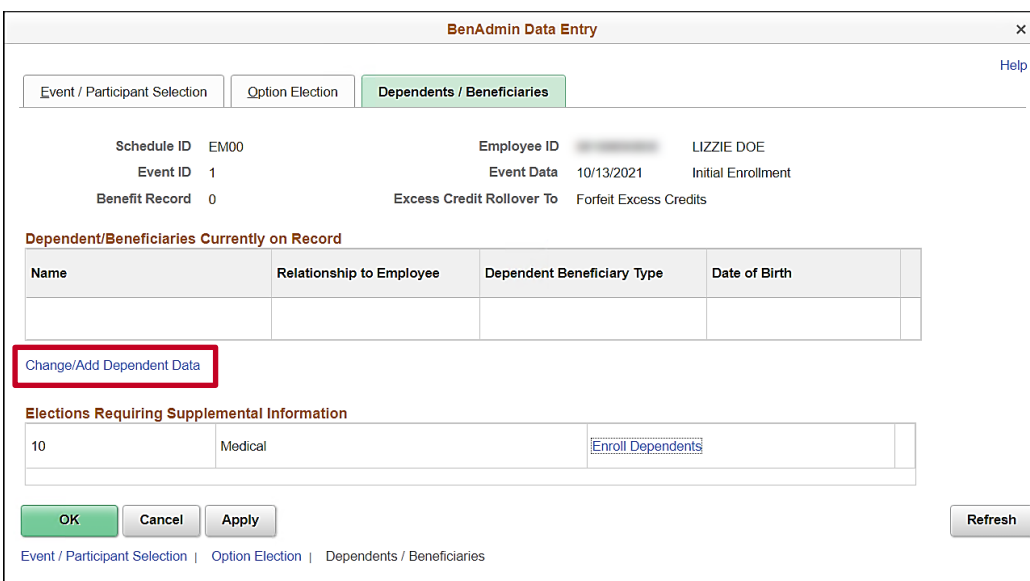
**Note:** If the employee selected single coverage, skip to **step 32**. If you need to add dependents, proceed with the following steps.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The employee information is LIZZIE DOE, Event ID 1, and Event Date 10/13/2021. The 'Available Plans and Options' section shows 'Plan Type 10 : Medical' with 'Option Code 118' and 'Key Adv 500 Comprehensive Dent (176F05) (Self + Spouse)'. Below this, there is a 'Dependents/Beneficiaries' section with an 'Enroll All' button and a table with columns: \*ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. A search icon and a minus sign are also visible in the table area.

14. Click on the **Dependent/Beneficiaries** tab.

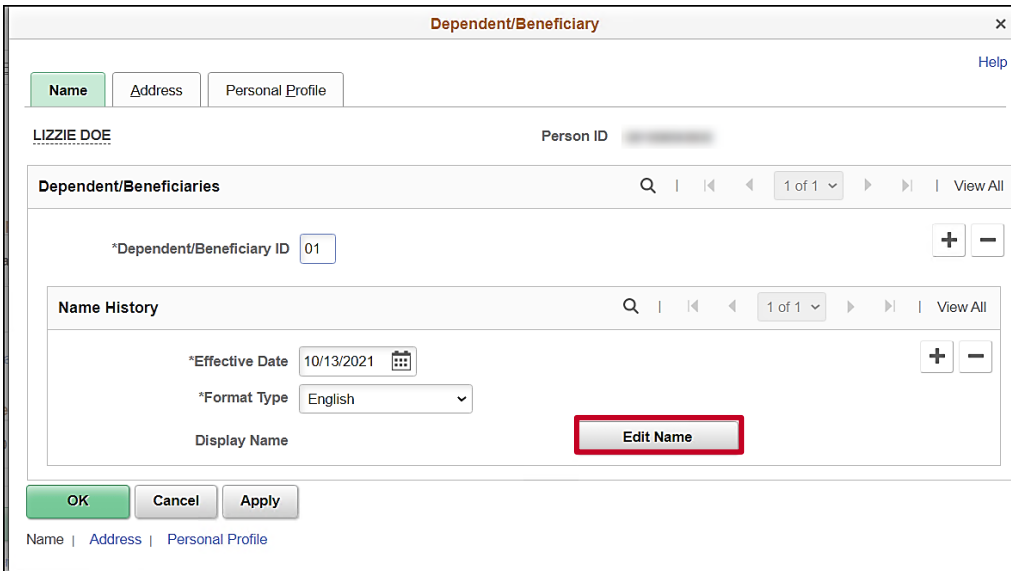
The **Dependent/Beneficiary** page displays.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The employee information is LIZZIE DOE, Event ID 1, and Event Date 10/13/2021. The 'Dependent/Beneficiaries Currently on Record' section shows a table with columns: Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. Below this, there is a 'Change/Add Dependent Data' button highlighted with a red box. The 'Elections Requiring Supplemental Information' section shows '10' and 'Medical' with an 'Enroll Dependents' button. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

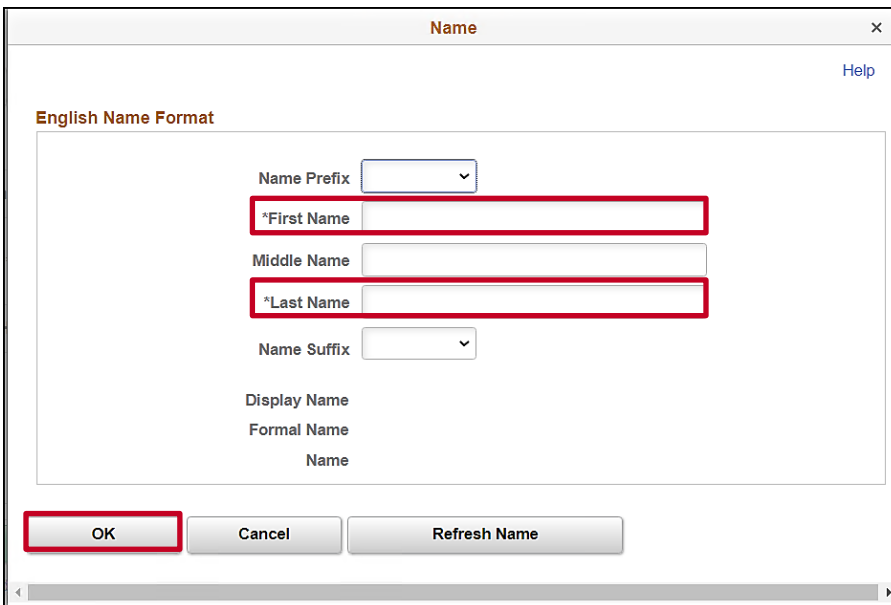
15. Click on the **Change/Add Dependent Data** hyperlink.

The **Dependent Information** page displays.



16. Click the **Edit Name** button.

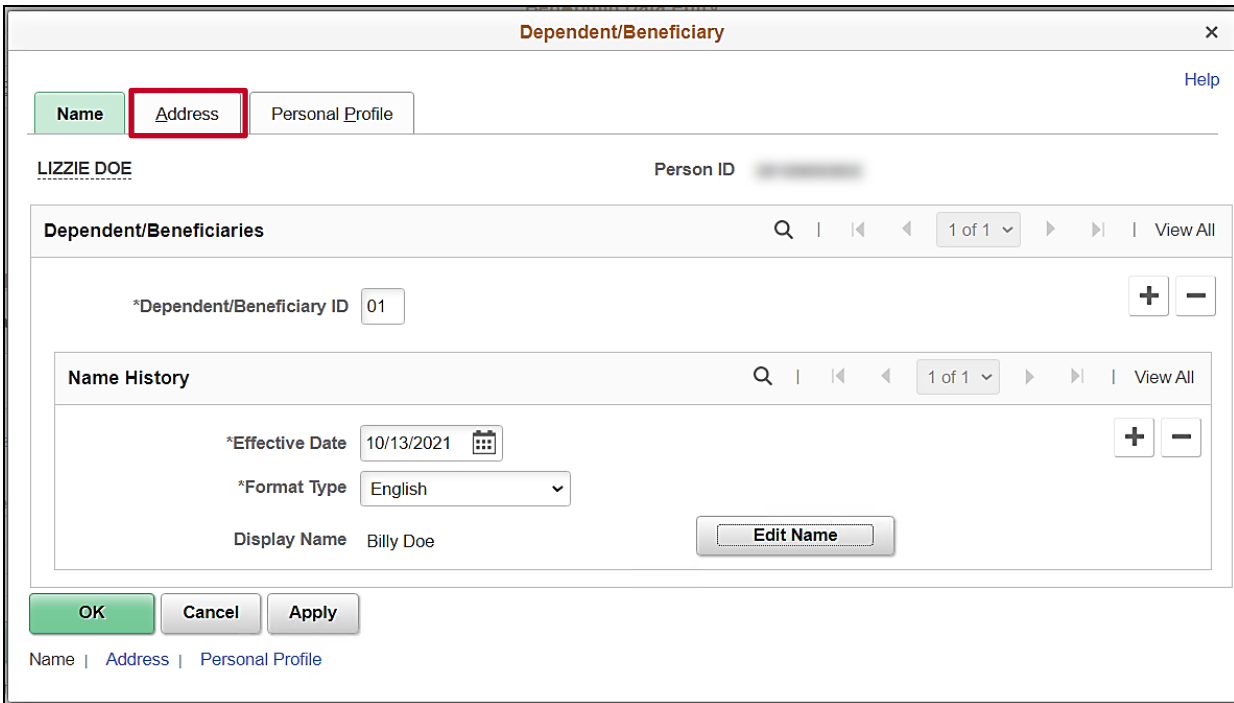
The **Name** page pop up displays.



17. Enter the **First Name** and **Last Name** of the dependent as indicated by the employee in the New Hire Benefit Enrollment Form.

18. Click **OK**.

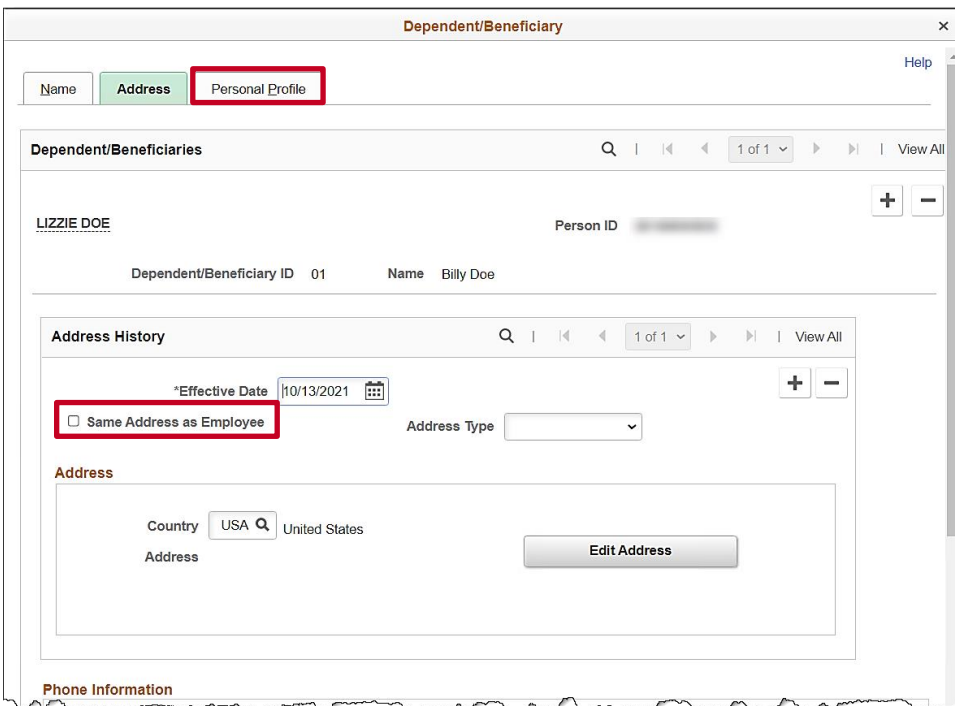
The **Dependent Information** page returns.



The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are three tabs: "Name", "Address" (which is highlighted with a red box), and "Personal Profile". Below the tabs, the name "LIZZIE DOE" and "Person ID" are displayed. A section titled "Dependent/Beneficiaries" contains a search bar, navigation arrows, and a dropdown showing "1 of 1". Below this is a form for a dependent with fields for "\*Dependent/Beneficiary ID" (01), "\*Effective Date" (10/13/2021), "\*Format Type" (English), and "Display Name" (Billy Doe). There is an "Edit Name" button. At the bottom, there are "OK", "Cancel", and "Apply" buttons. A footer contains links for "Name", "Address", and "Personal Profile".

19. Click on the **Address** tab.

The **Address** page displays.

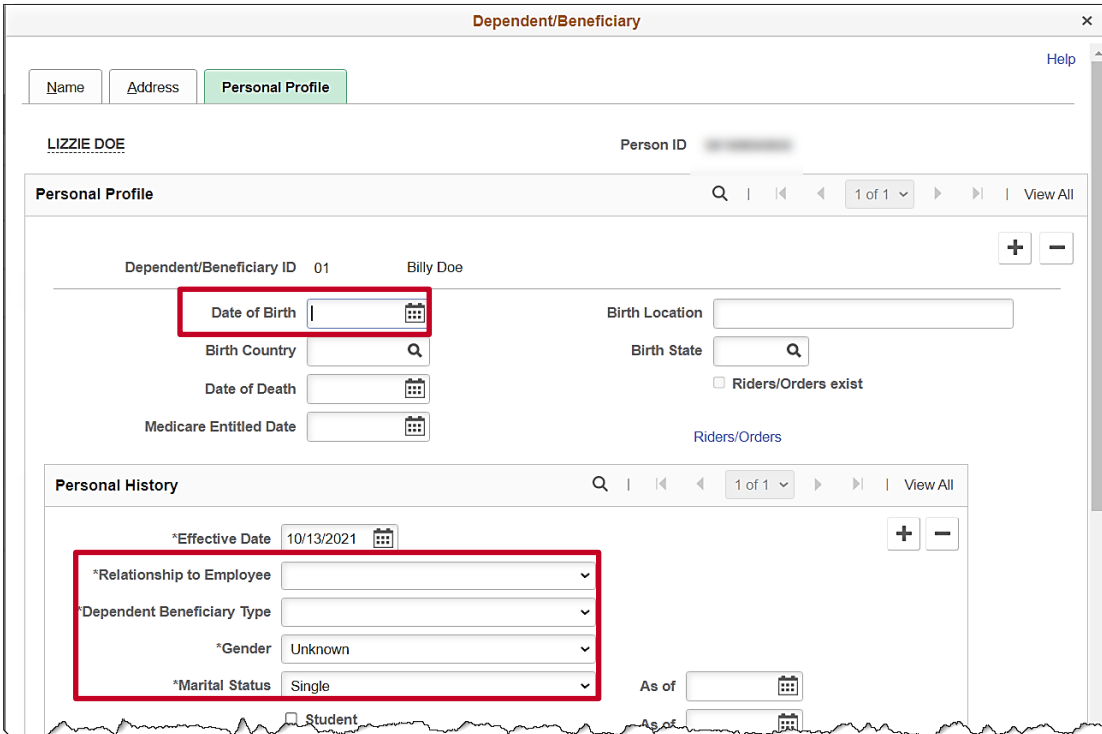


The screenshot shows the same "Dependent/Beneficiary" window, but now the "Personal Profile" tab is selected and highlighted with a red box. The "Address" tab is no longer highlighted. The "Dependent/Beneficiaries" section now shows "LIZZIE DOE" and "Person ID" with plus and minus buttons. Below this, the dependent's information is listed: "Dependent/Beneficiary ID 01" and "Name Billy Doe". The "Address History" section has a search bar, navigation arrows, and a dropdown showing "1 of 1". Below this is a form for an address with fields for "\*Effective Date" (10/13/2021), "Address Type", and "Address". A checkbox labeled "Same Address as Employee" is highlighted with a red box. The "Address" field includes a "Country" dropdown set to "USA" and "United States", and an "Address" input field. There is an "Edit Address" button. At the bottom, there is a "Phone Information" section.

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

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

The **Personal Profile** page displays.



The screenshot shows a web interface for a 'Dependent/Beneficiary' profile. At the top, there are tabs for 'Name', 'Address', and 'Personal Profile'. The main content area is titled 'Personal Profile' and includes a search bar and navigation controls. Below this, there is a section for 'Dependent/Beneficiary ID 01 Billy Doe'. The 'Date of Birth' field is highlighted with a red box. Other fields include 'Birth Country', 'Date of Death', 'Medicare Entitled Date', 'Birth Location', 'Birth State', and a checkbox for 'Riders/Orders exist'. Below this is a 'Personal History' section with a search bar and navigation controls. It contains several dropdown menus: '\*Relationship to Employee', '\*Dependent Beneficiary Type', '\*Gender' (set to 'Unknown'), and '\*Marital Status' (set to 'Single'). There are also 'As of' date pickers and a 'Student' checkbox.

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

23. For this example, select **Spouse** from the drop-down menu next to **Relationship to Employee**.

**Note:** Localities should utilize the following **Relationship to Employee** types as needed: Child, Adult Child, Other Child, Spouse, US Same-Sex Spouse, Stepchild, Ex-Spouse. Other values are not accepted by benefits vendors.

24. The **Dependent Type** defaults to **Unapproved Dependent**. Select **Approved Dependent** from the drop-down menu next to **Dependent Beneficiary Type** only if all supporting documentation has been submitted by the employee.

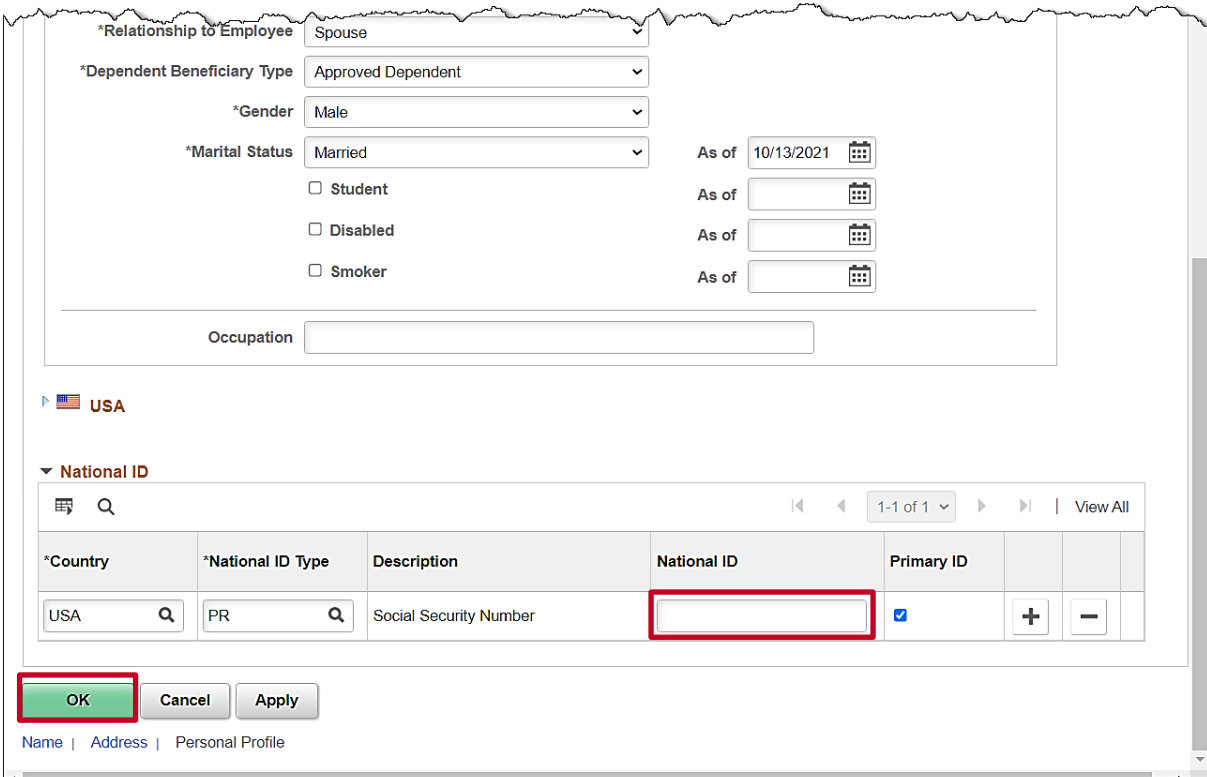
**Note:** The dependent will not receive an insurance card until they are approved.

25. Select the **Gender** of the dependent.

26. Confirm the **Marital Status** is **Married** for the **Spouse** dependent.

**Note:** If any additional information was provided by the employee for the dependent, enter it on this page. The **Student** nor the **Smoker** checkboxes are utilized here.

The **National ID** section displays.



\*Relationship to Employee: Spouse

\*Dependent Beneficiary Type: Approved Dependent

\*Gender: Male

\*Marital Status: Married

As of: 10/13/2021

Student

Disabled

Smoker

Occupation: \_\_\_\_\_

USA

**National ID**

*Country	*National ID Type	Description	National ID	Primary ID		
USA	PR	Social Security Number	<input style="border: 2px solid red;" type="text"/>	<input checked="" type="checkbox"/>	+	-

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

27. Scroll down to **National ID** section and enter the **SSN** for the dependent.

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

28. Click **OK**.



# HR and Benefits Job Aid

## BN361 Completing a New Hire and Benefit Enrollment

The **Election Entry** page returns.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The window title is 'BenAdmin Data Entry' and it has a 'Help' link in the top right. The navigation tabs are 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Option Election' tab is highlighted with a red box. Below the tabs, there is a summary of employee information: Schedule ID EM00, Employee ID [redacted] LIZZIE DOE, Event ID 1, Event Data 10/13/2021, Initial Enrollment, Benefit Record 0, and Excess Credit Rollover To Forfeit Excess Credits. Below this is a section titled 'Dependent/Beneficiaries Currently on Record' with a table:

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe, Billy	Spouse	Approved Dependent	02/05/1993

Below the table is a link 'Change/Add Dependent Data'. Underneath is a section titled 'Elections Requiring Supplemental Information' with a table:

10	Medical	Enroll Dependents
----	---------	-------------------

At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'. The breadcrumb trail at the bottom reads 'Event / Participant Selection | Option Election | Dependents / Beneficiaries'.

29. Click the **Option Election** tab.

The **Option Election** page returns.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The window title is 'BenAdmin Data Entry' and it has a 'Help' link in the top right. The navigation tabs are 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Option Election' tab is highlighted. Below the tabs, there is a summary of employee information: Sched ID EM00, Empl ID [redacted] LIZZIE DOE, Ben Record 0, Event ID 1, Event Data 10/13/2021, Initial Enrollment, Excess Credit Rollover To Forfeit Excess Credits. Below this is a section titled 'Available Plans and Options' with a search bar and a dropdown menu showing '1 of 1'. Underneath is a section titled 'Plan Type 10 : Medical' with a search bar for 'Option Code' containing '18' and a search icon. Below the search bar is the text 'Key Adv 500 Comprehensive Dent (176F05) (Self + Spouse)'. There is a text input field for 'Health Provider ID' and a checkbox for 'Previously Seen'. Below this is a section titled 'Dependents/Beneficiaries' with a button 'Enroll All' highlighted with a red box. Below the button is a table:

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
				<input type="checkbox"/>		<input type="checkbox"/>

At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'. The breadcrumb trail at the bottom reads 'Event / Participant Selection | Option Election | Dependents / Beneficiaries'.





## BN361 Completing a New Hire and Benefit Enrollment

30. Click on the **Enroll All** button under the Dependent/Beneficiaries section to enroll all listed dependents in the Medical Benefit Plan for the employee.

The **Option Election** tab refreshes.

BenAdmin Data Entry

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

Sched ID EM00    Empl ID ██████████ LIZZIE DOE    Ben Record 0    Event ID 1  
Event Data 10/13/2021 Initial Enrollment    Excess Credit Rollover To    Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 18    Key Adv 500 Comprehensive Dent (176F05) (Self + Spouse)

Health Provider ID     Previously Seen    Special Requirements

Dependents/Beneficiaries

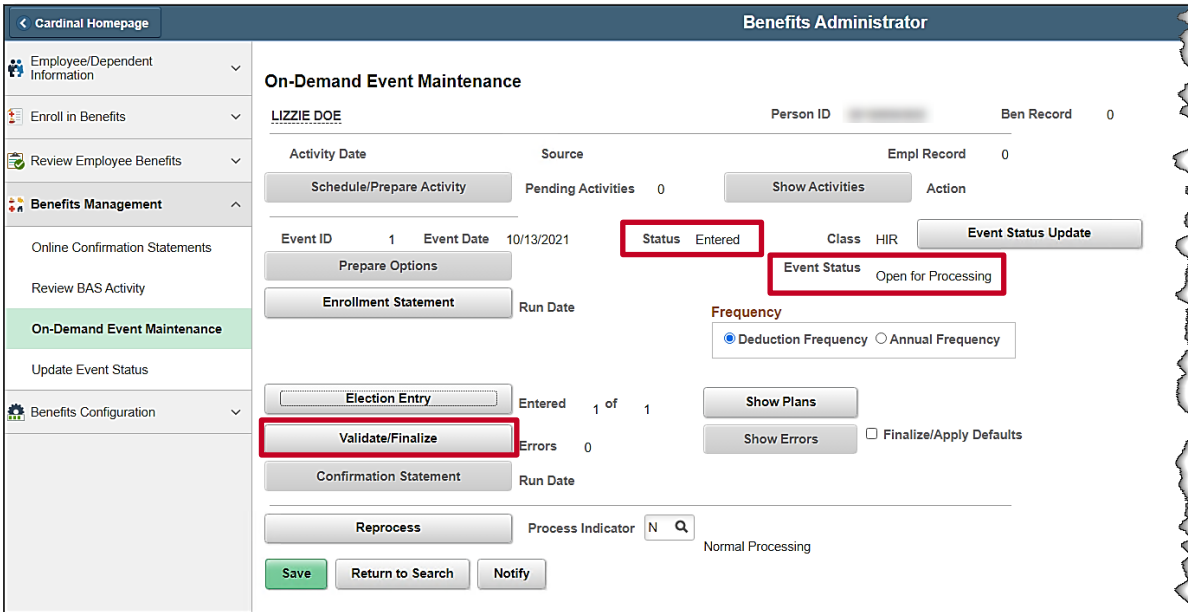
**Enroll All**

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Billy Doe	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>

OK    Cancel    Apply    Refresh

31. For this example, confirm the **Spouse** is listed under the **Dependent/Beneficiaries** section for **Plan Type 10: Medical**.
32. Click **OK** to return to the On Demand Event Maintenance page.

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



**On-Demand Event Maintenance**

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 10/13/2021 Status Entered Class HIR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency

Deduction Frequency  Annual Frequency

Election Entry Entered 1 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

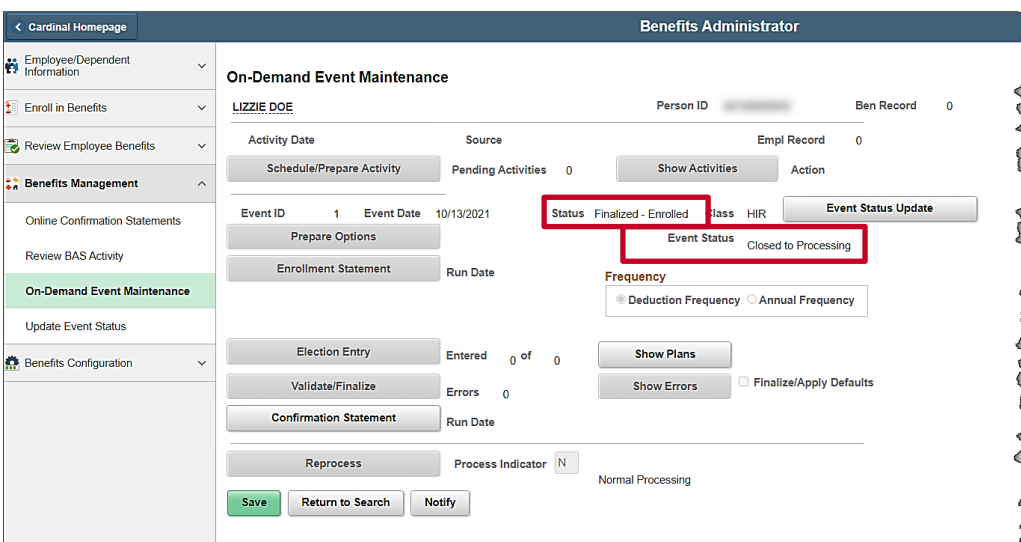
33. Confirm the **Status** is **Entered**, and the **Event Status** is **Open for Processing**.

34. Click on **Validate/Finalize** button to validate elections, close the event, and send the elections to the benefits vendors.

**Note:** Once the event has been finalized, you will receive a message indicating that the process has completed successfully.

35. Click **OK** on the pop-up window message.

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



**On-Demand Event Maintenance**

LIZZIE DOE Person ID [REDACTED] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 10/13/2021 Status Finalized - Enrolled Class HIR Event 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 Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

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