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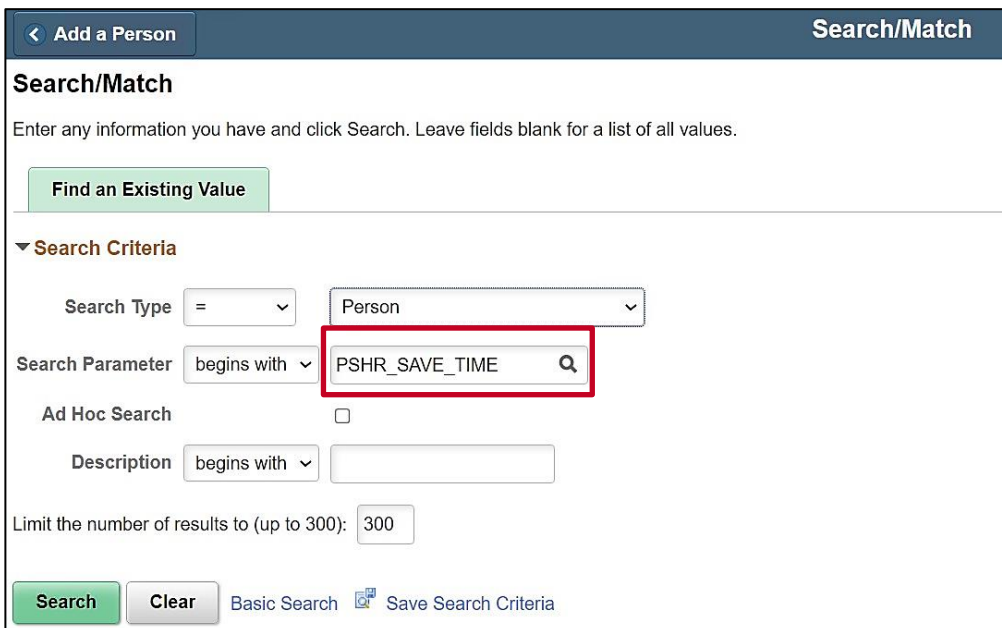
   Navigator > Workforce Administration > Personal Information > Add a Person

The **Add a Person** page displays.

2. Click the **Search for Matching Persons** link.
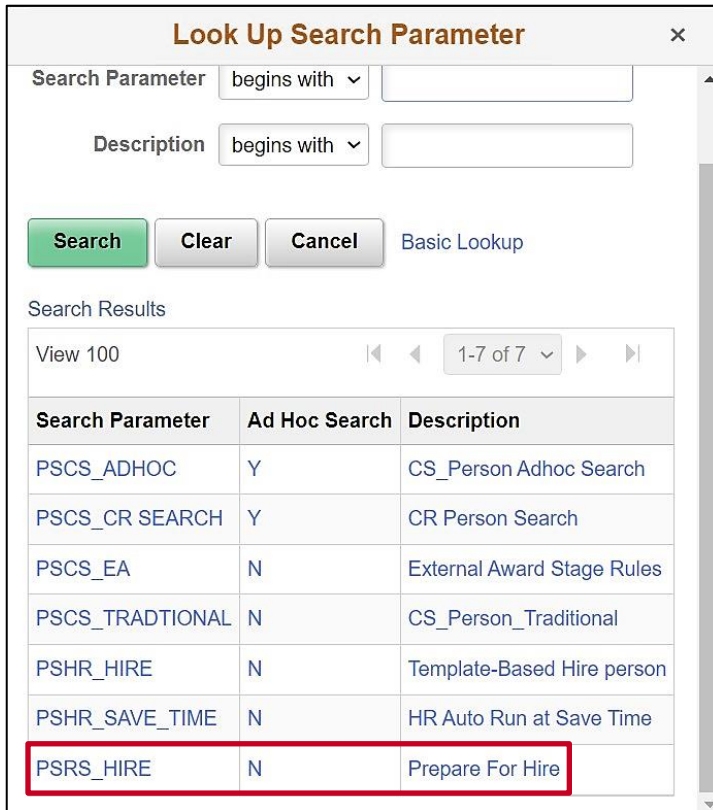
The **Search/Match** search page displays.

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.
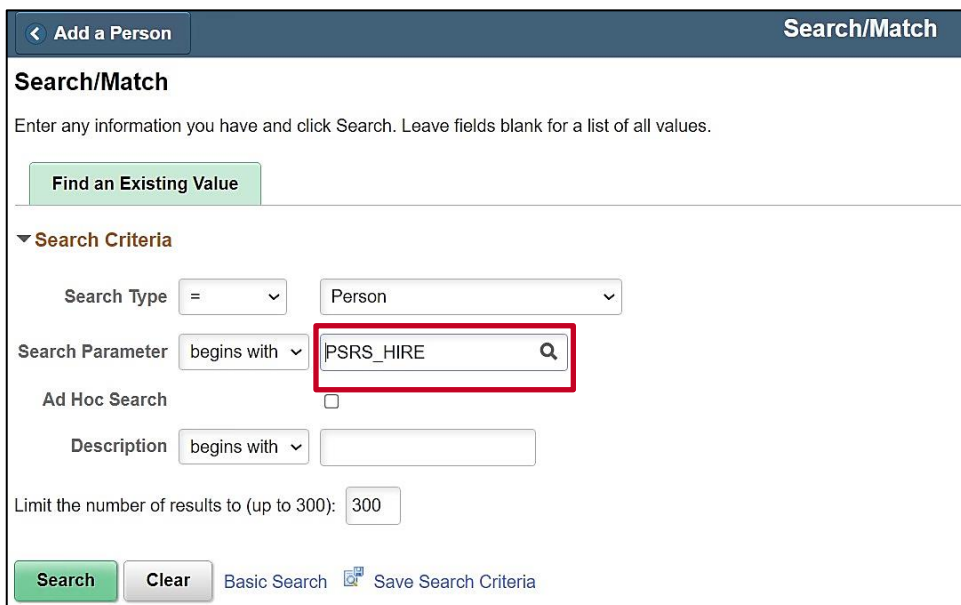
4. Select the **PSRS_HIRE** value.

The **Search/Match** page refreshes with the updated **Search Parameter.**
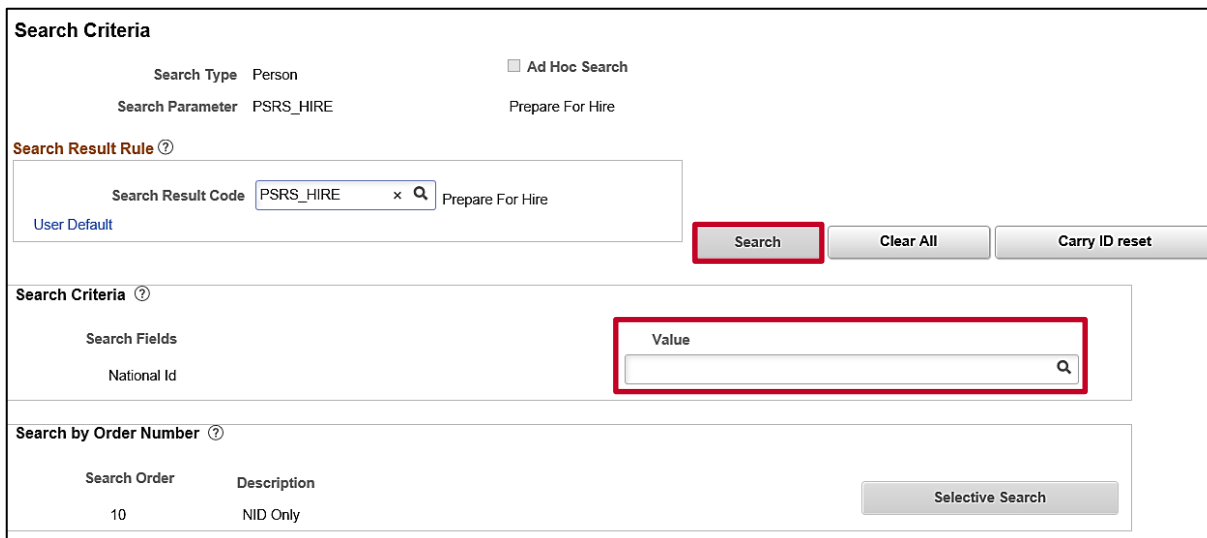
5. Click the **Search** button.
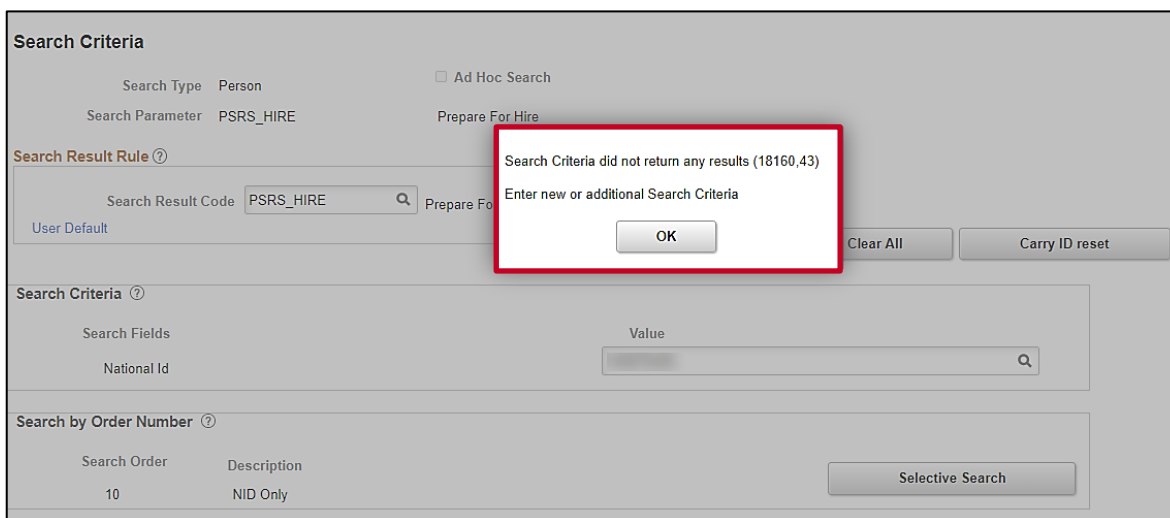
The **Search/Match** page displays.

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.

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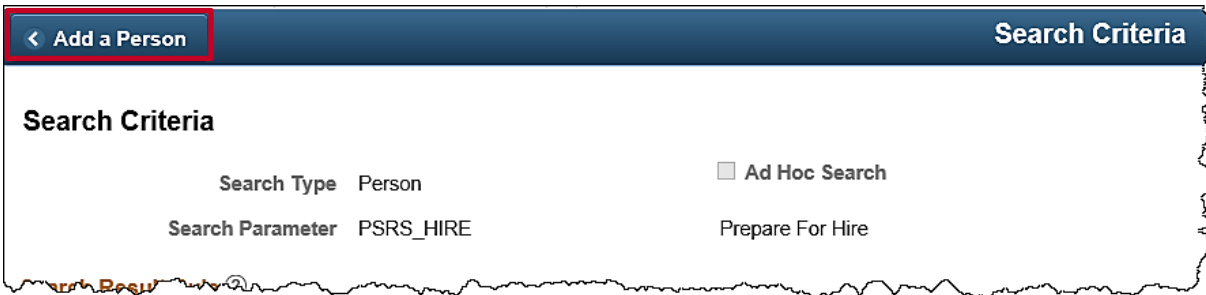
10. Click the **Add a Person** tab in the top left-hand corner of the page.
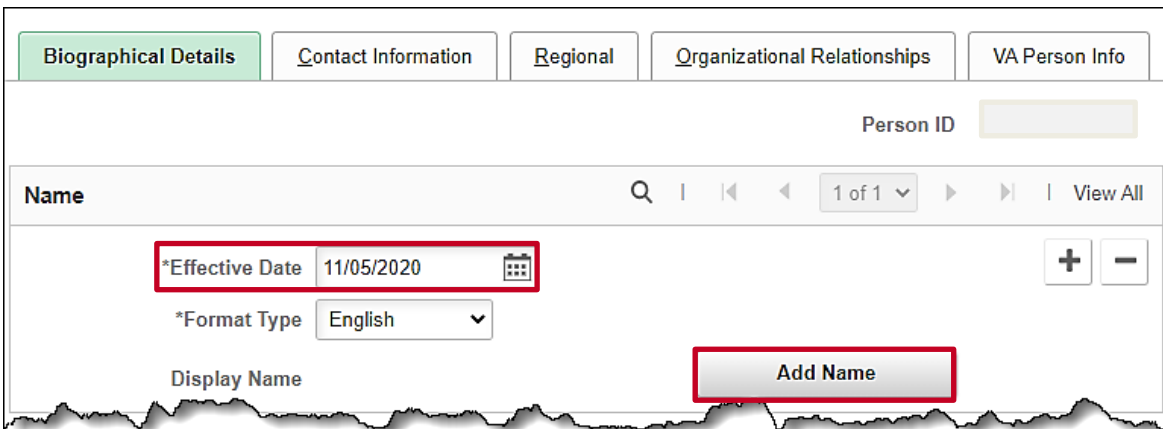
The **Add a Person** page returns.

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

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

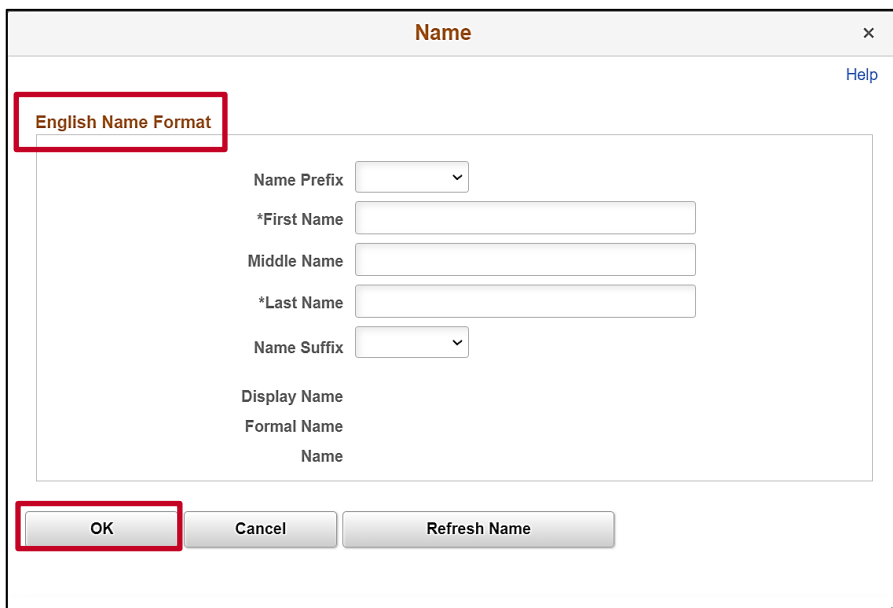The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

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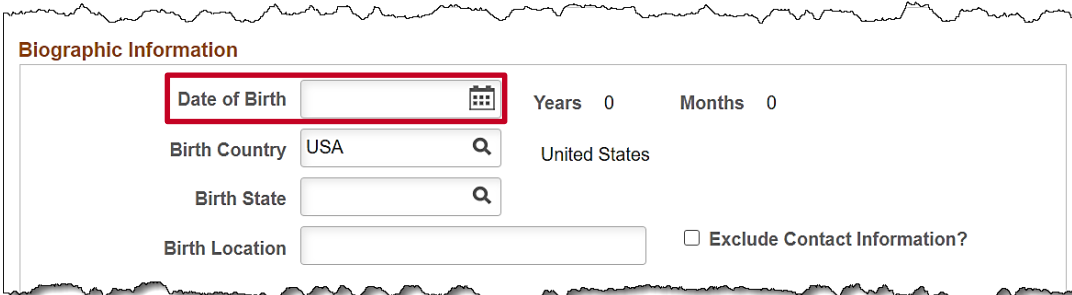
14.   Click the **Add Name** button.

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.

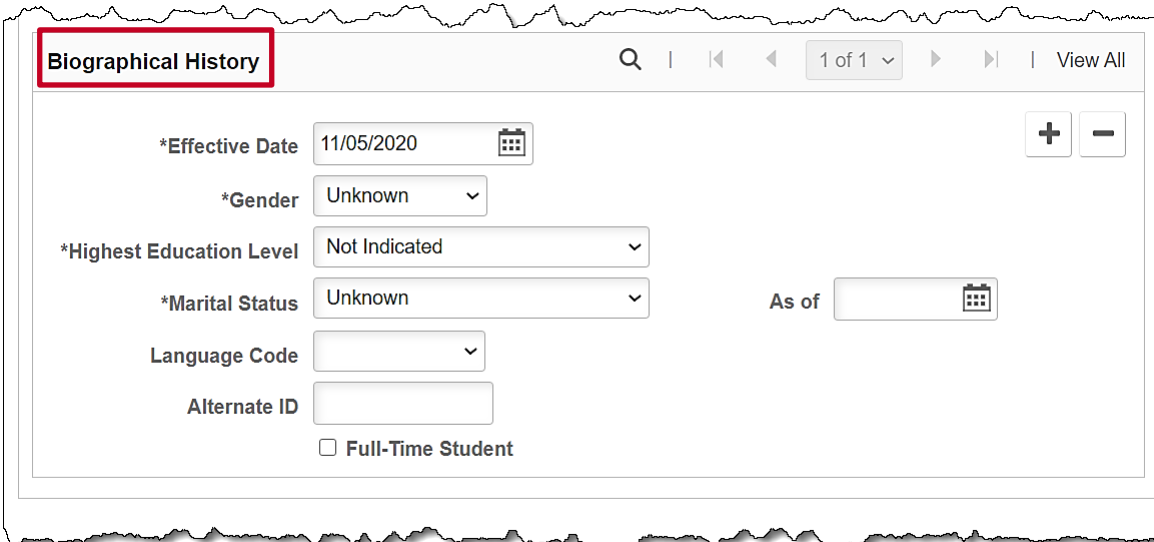21.   Click the **OK** button.

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.

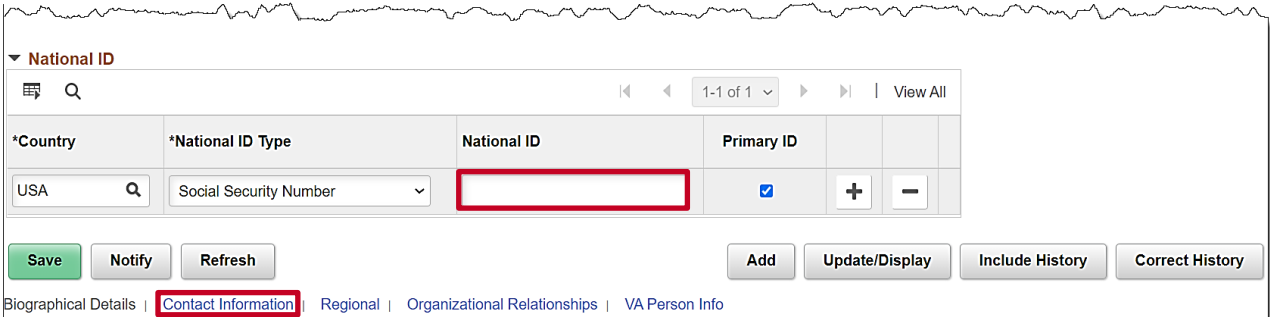25. Scroll down to the **Biographical History** section.

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.
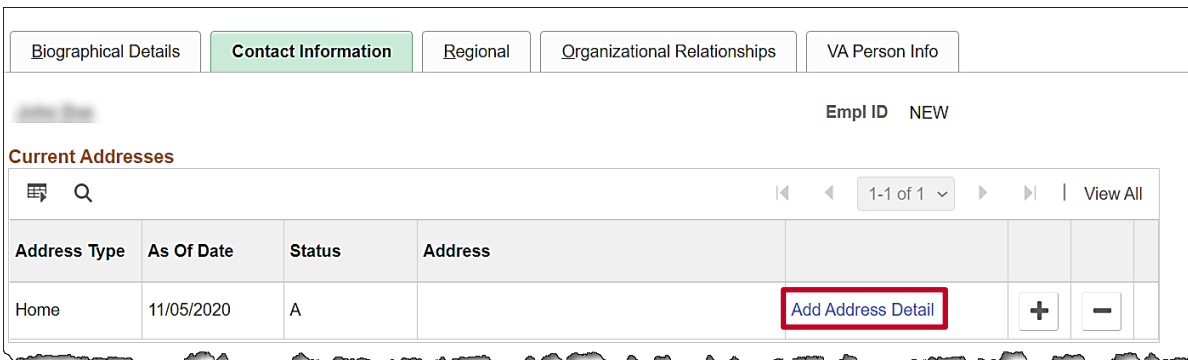
The **National ID** section displays.

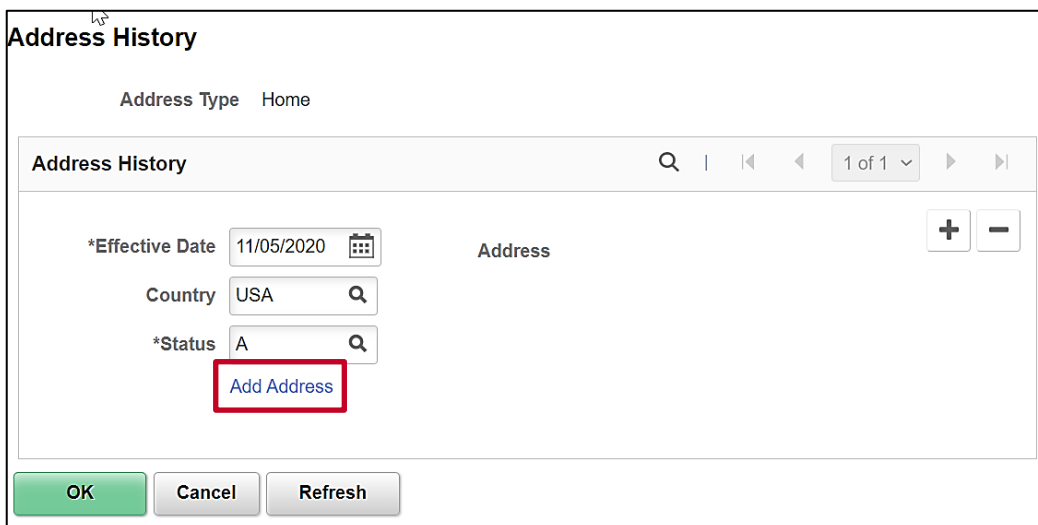31. Enter the employee's SSN in the **National ID** field.

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

The **Contact Information** tab displays.
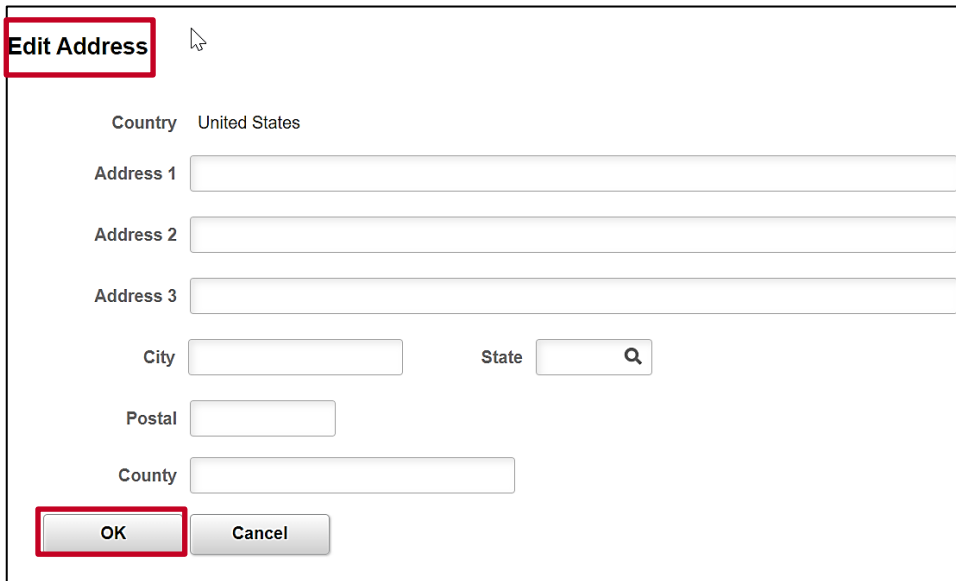

33. Click the **Add Address Detail** link.

The **Address History** page displays.

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

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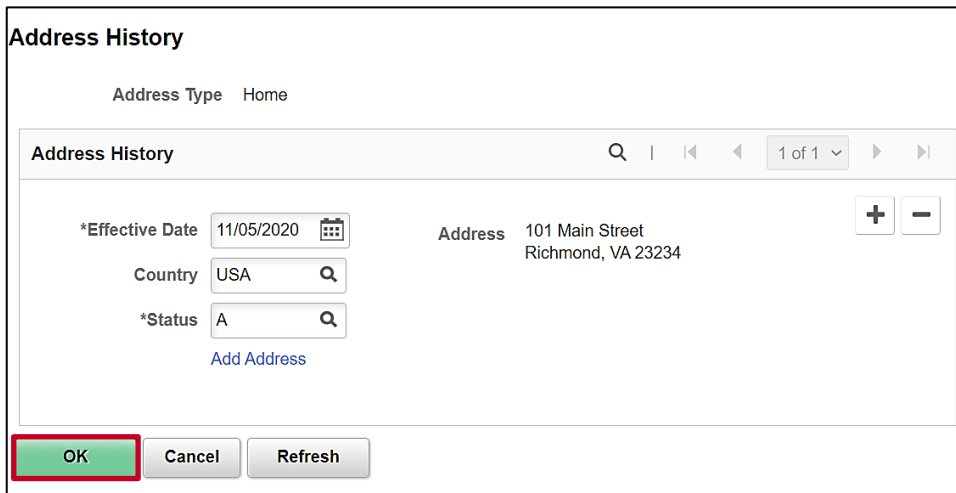
35.   Enter the employee's complete address information using the applicable fields. **Address 1**, **City**, **State**, and **Postal** are all required fields. The others are optional.

36.   Click the **OK** button.

The **Address History** page returns with the address information displayed.
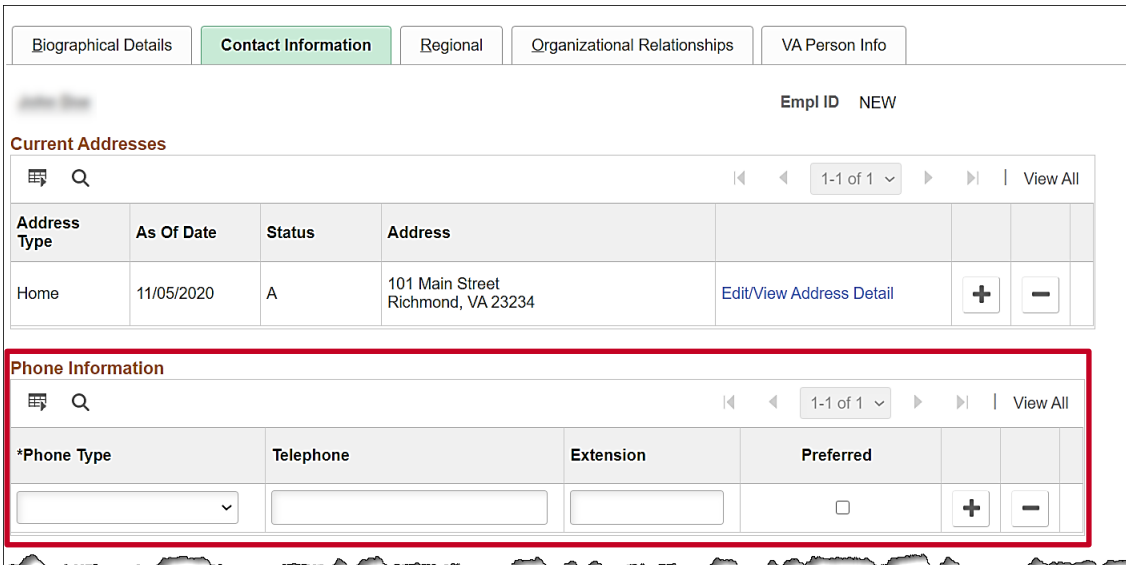
37.   Click the **OK** button.

The **Contact Information** tab returns.
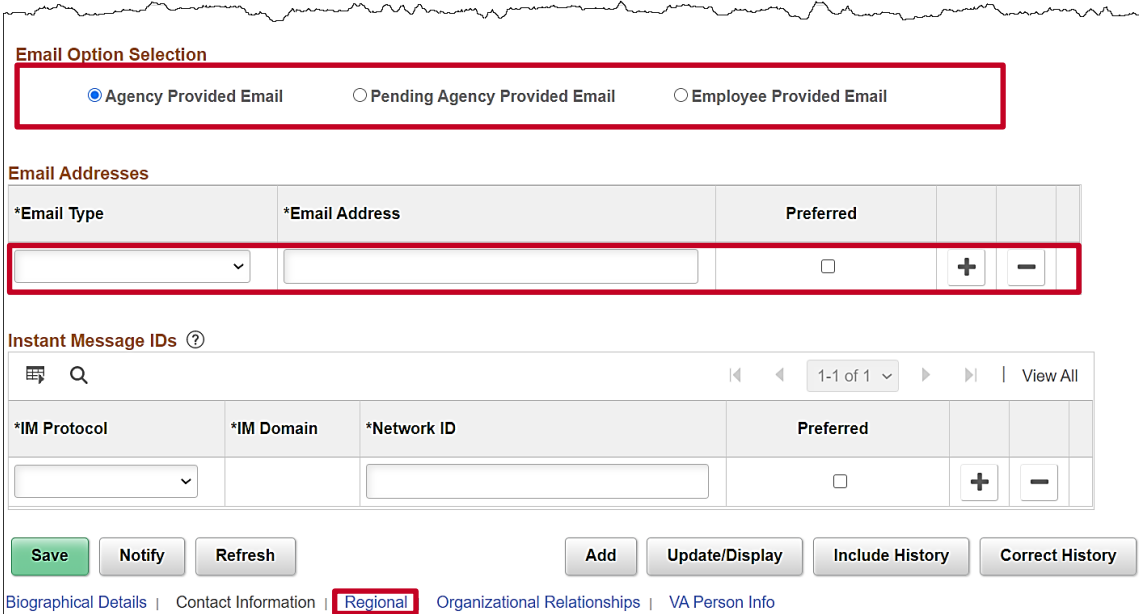
38. Select the type of phone using the **Phone Type** field dropdown button.

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.

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

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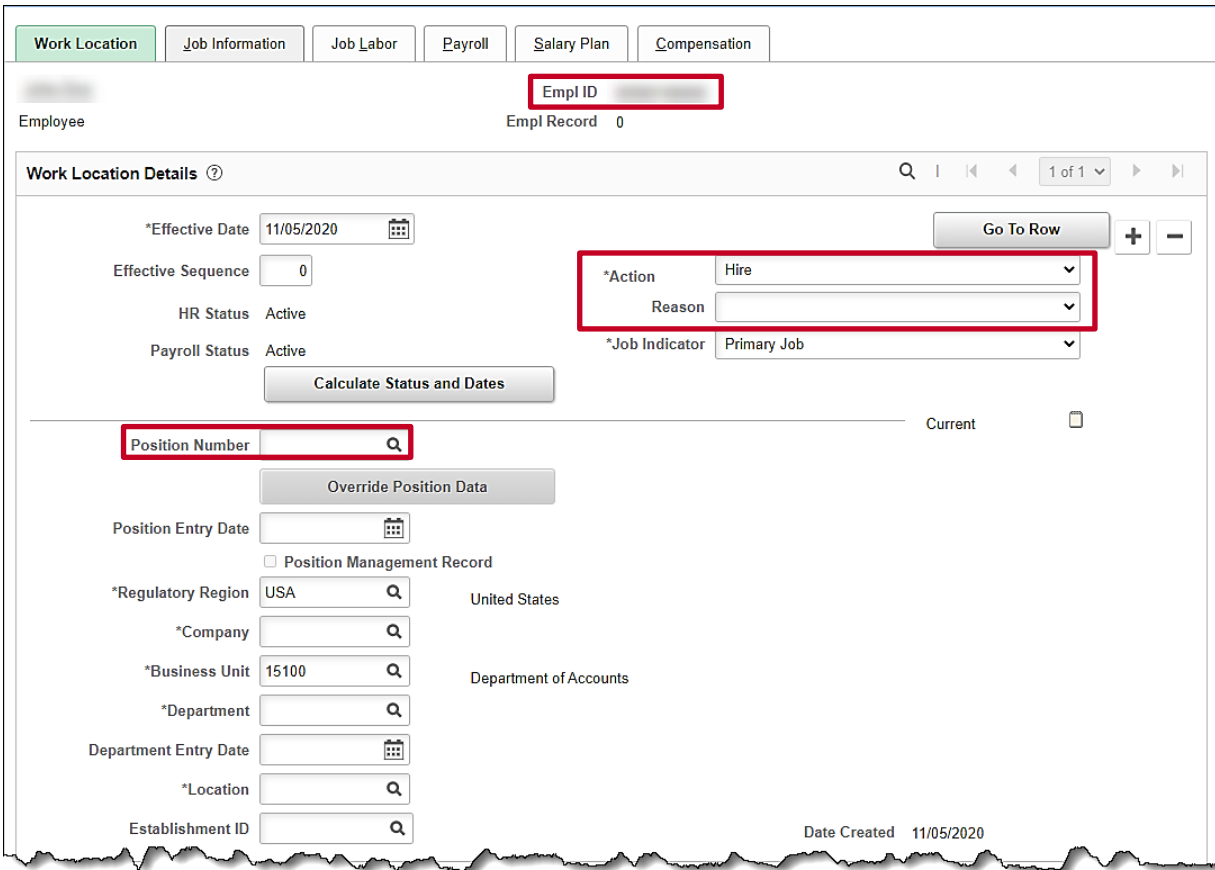
45.	Select the **Employee** checkbox option.

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.

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

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

The **Job Information** tab displays.

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

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.

The **Payroll** tab refreshes automatically.

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.

The **Salary Plan** tab displays.

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.

![Cardinal logo]

The **Compensation** tab displays.

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.

The **Benefits Program Participation** page displays.

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.

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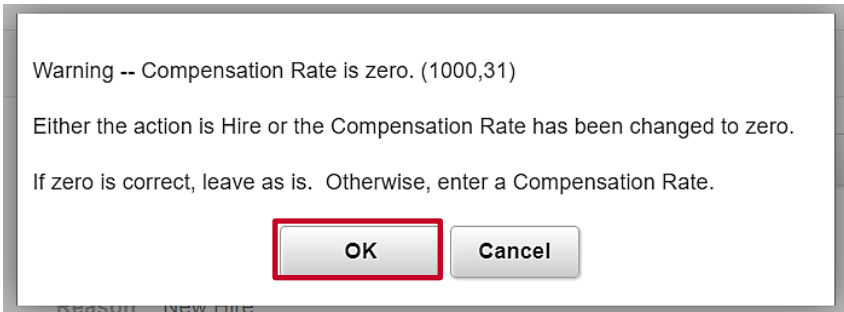
78. Click the **OK** button to close the **Warning** message. A Compensation Rate of zero is correct because payroll is not managed in Cardinal.

The **Organizational Relationships** page returns.
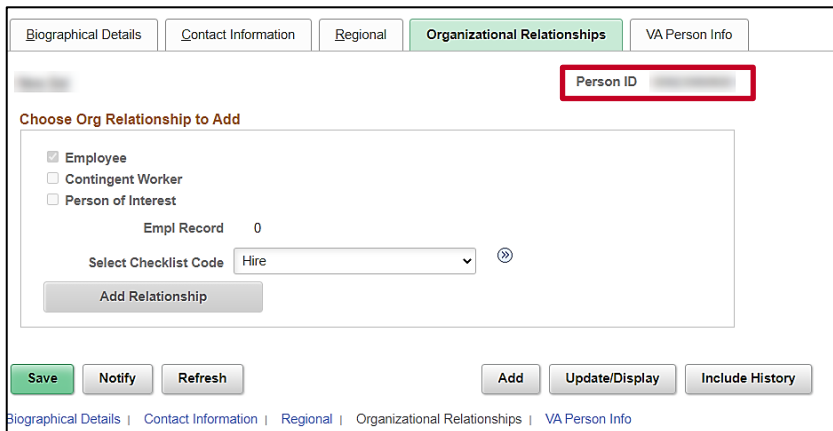
New Hire Benefit Enrollment

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.
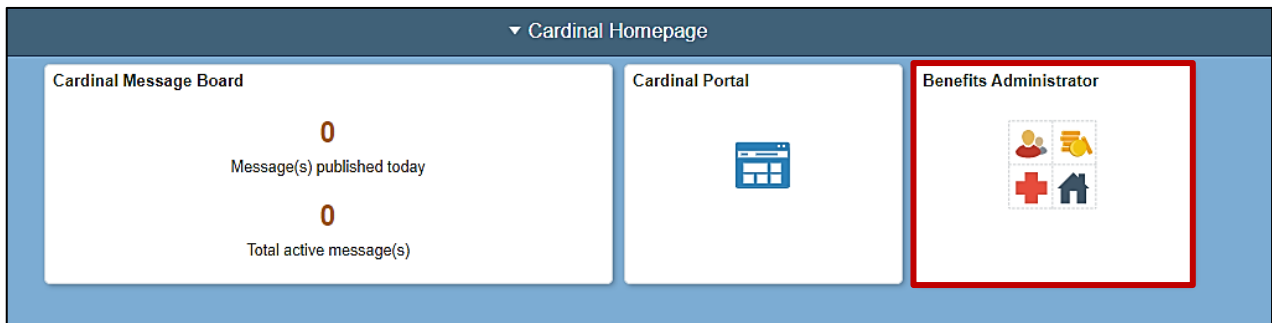
2.   Click on the **Benefits Administrator** tile on the Cardinal Homepage.
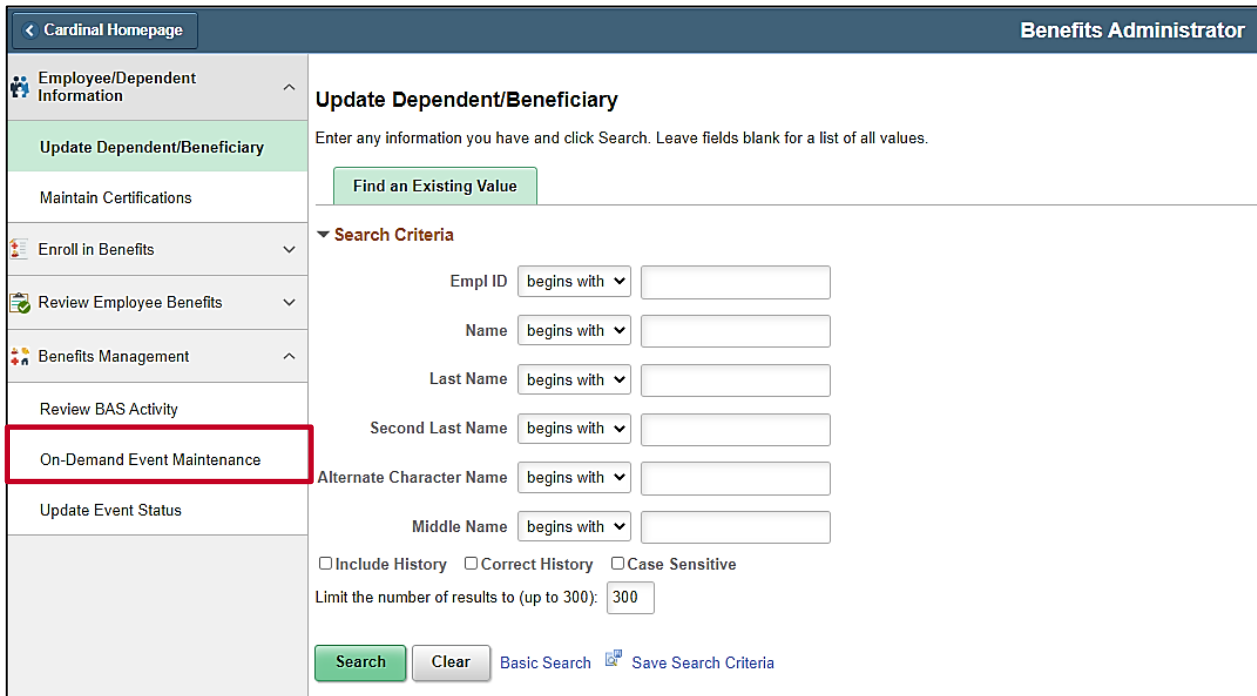
The **Update Dependent/Beneficiary** page displays.
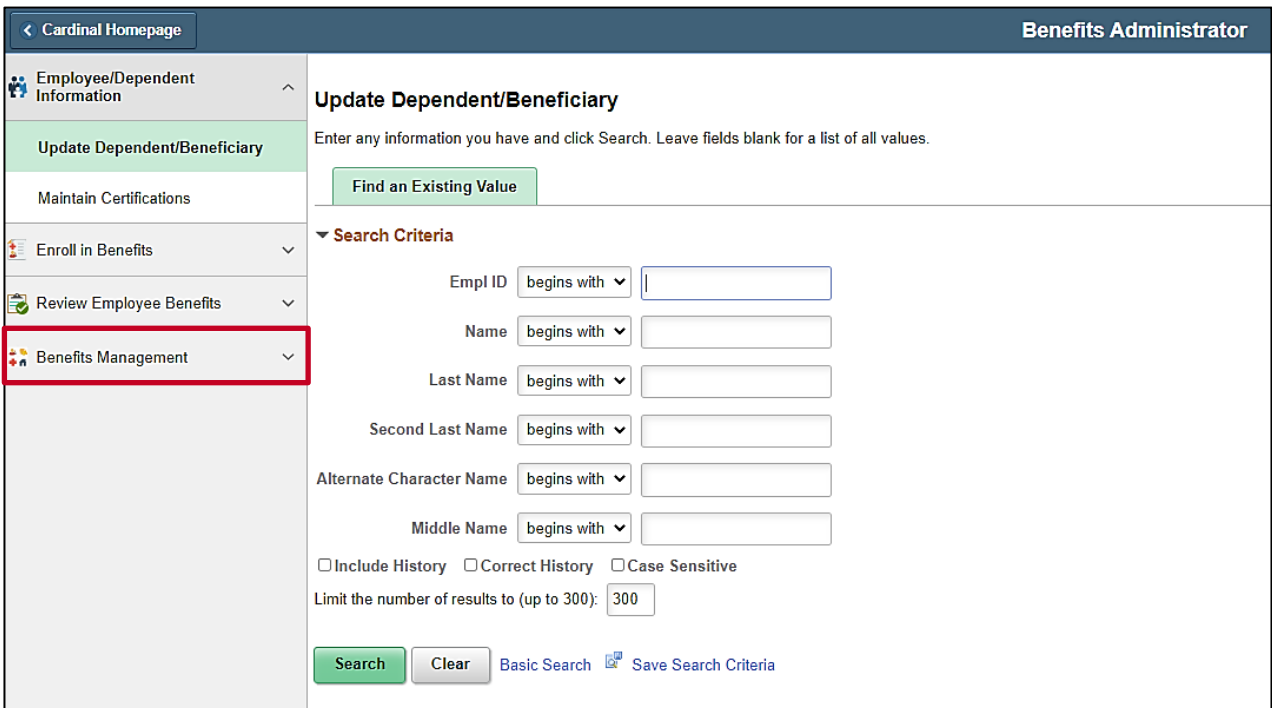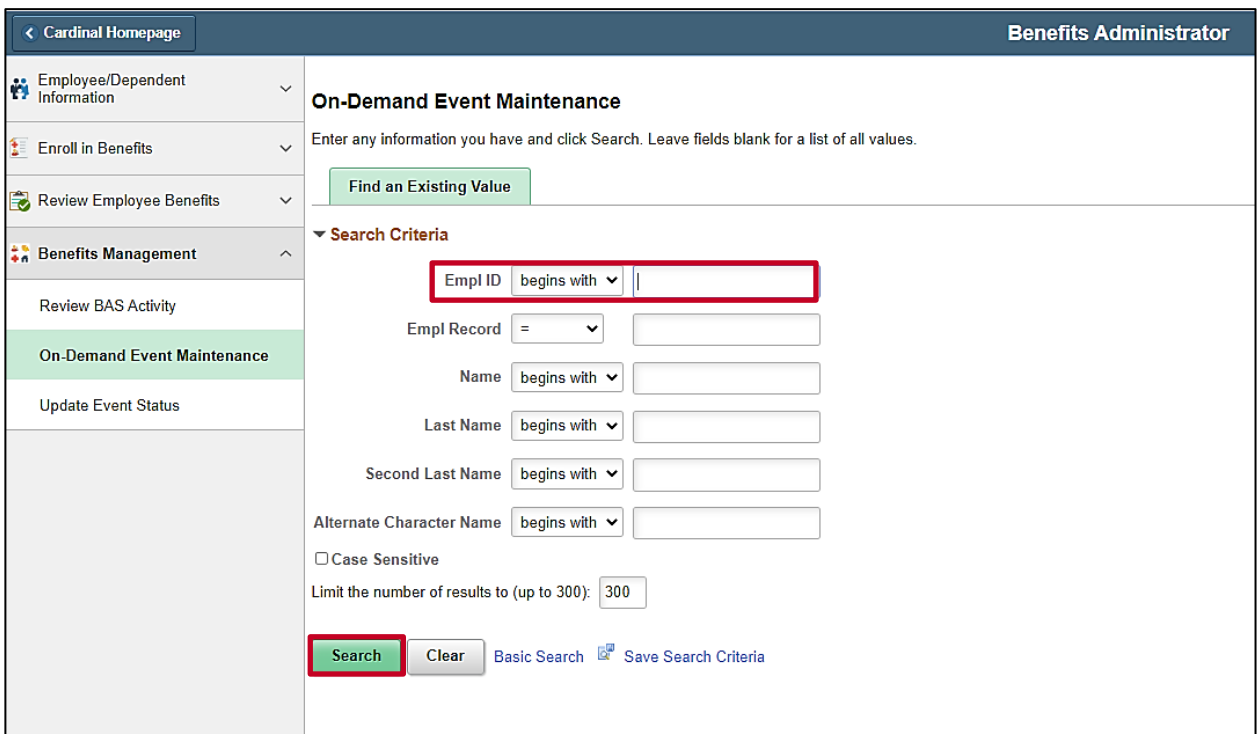
3.   Click the **Benefits Management** list item on the left-hand side of the screen.

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

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

The **On-Demand Event Maintenance** page displays.
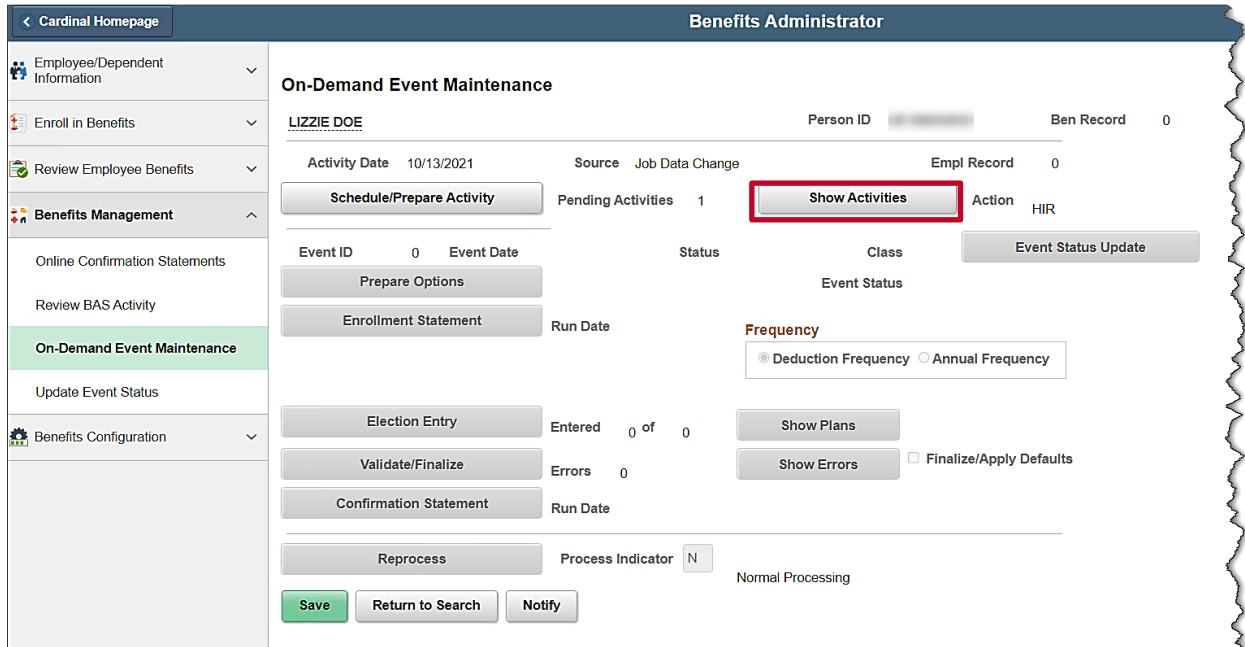
5.   Enter the **Empl ID** in the search box.

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.

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

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

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

9.   Click **OK.**

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

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.

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

The **Election Entry** page displays.

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

The **Medical Benefit Plan Elections Look Up** pop up displays.
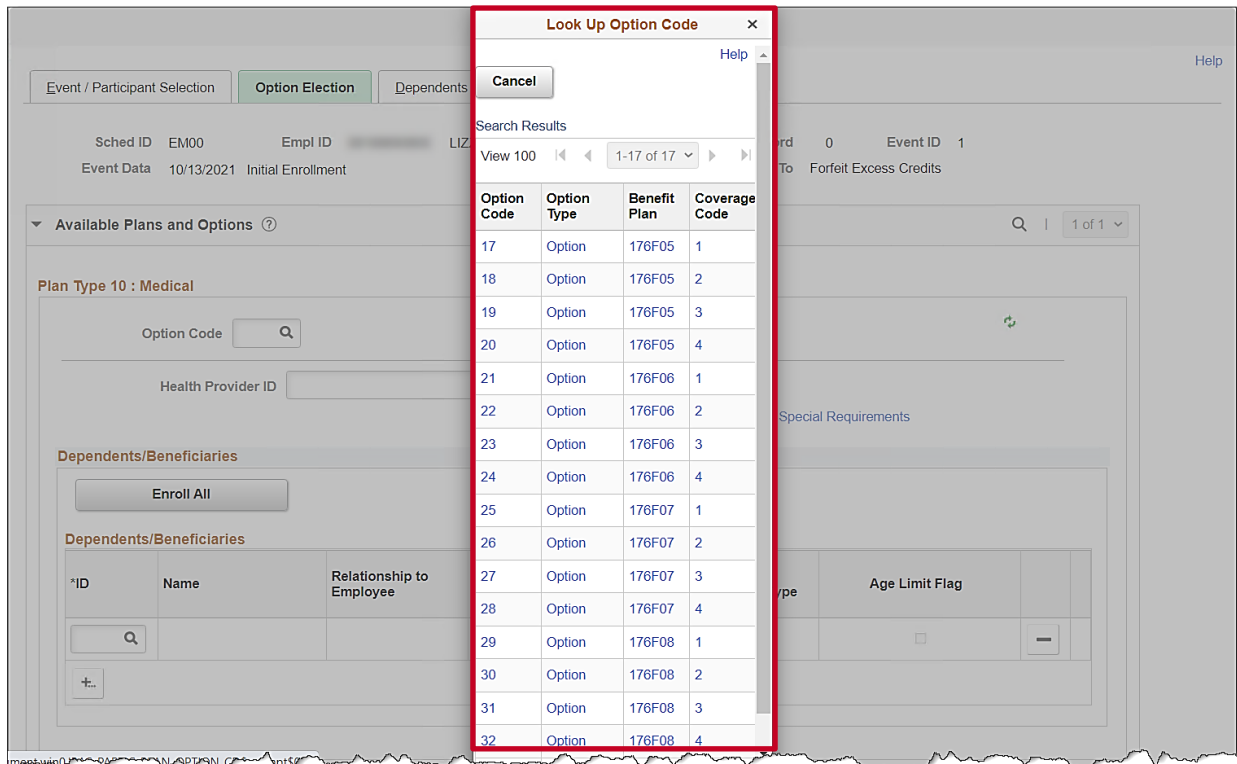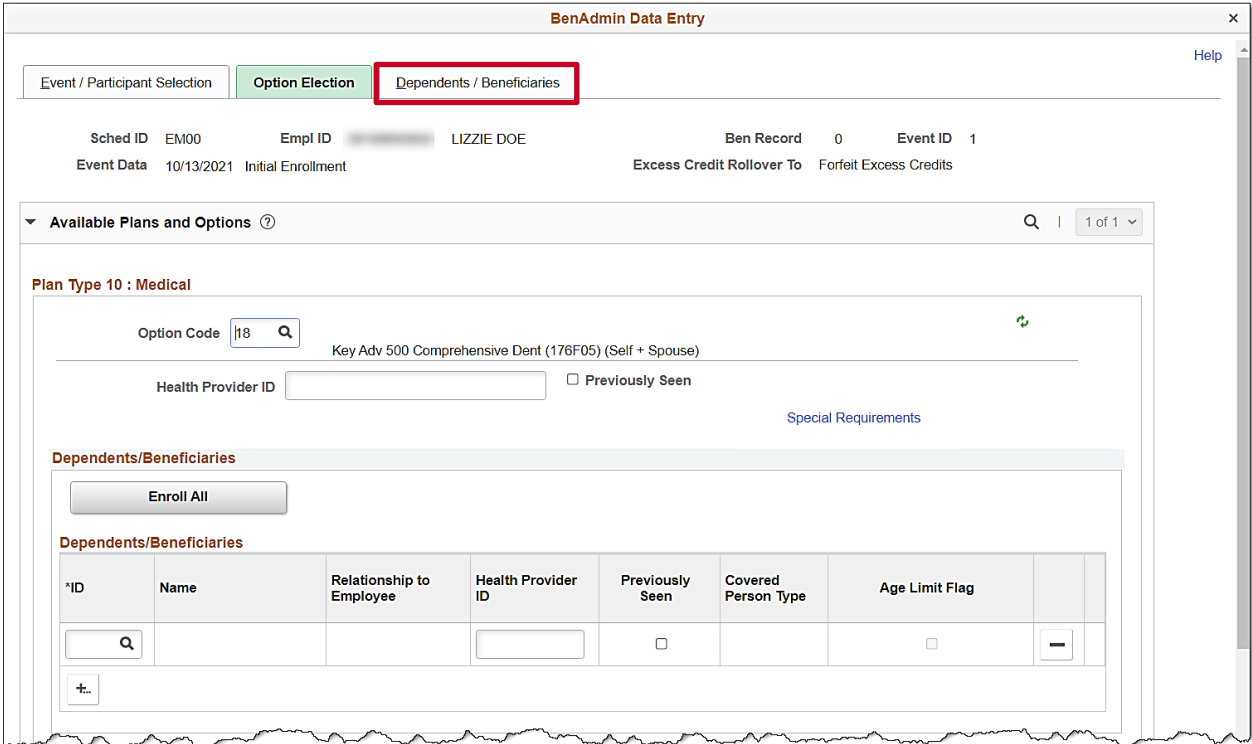
13. Select the Benefit Plan and Coverage Code indicated on the enrollment form submitted by the employee. For this scenario, we will select a Benefit Plan with **Coverage Code 2**, for Employee + Spouse coverage.

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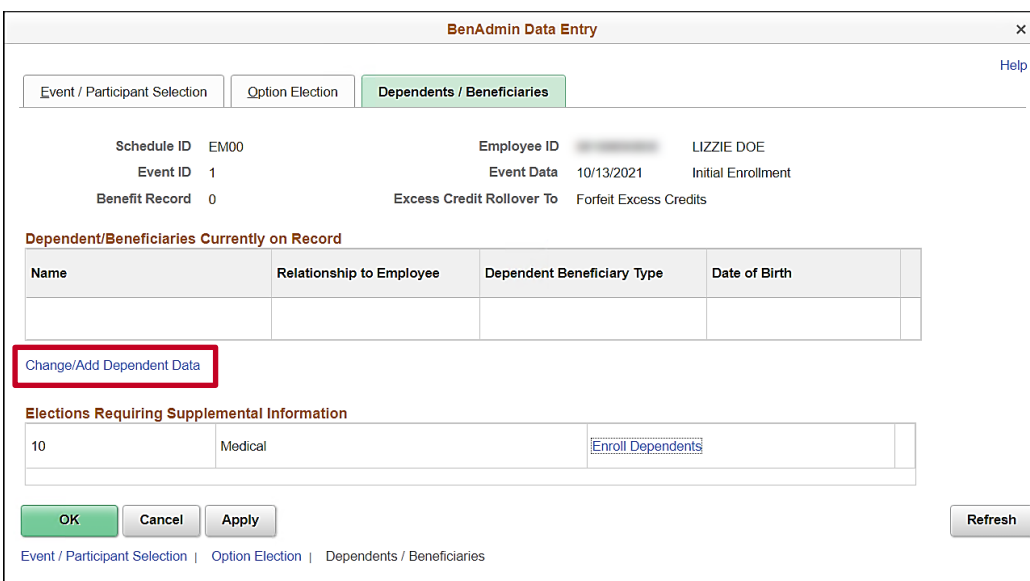
Note: If the employee selected single coverage, skip to **step 32**. If you need to add dependents, proceed with the following steps.

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

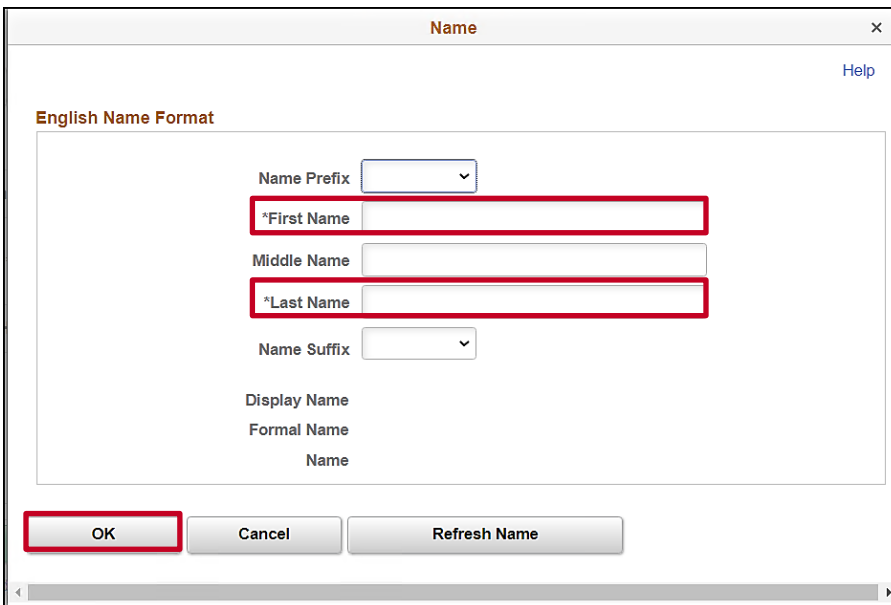The **Dependent/Beneficiary** page displays.

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

The **Dependent Information** page displays.
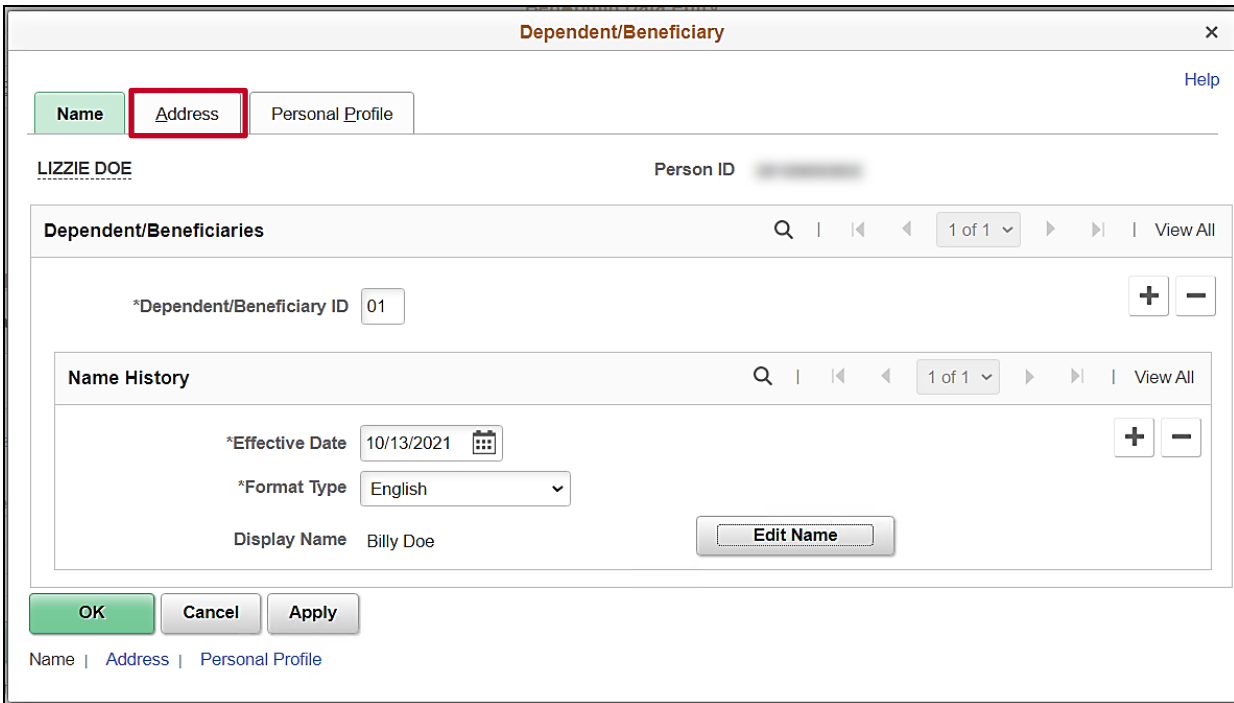

16.   Click the **Edit Name** button.

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.
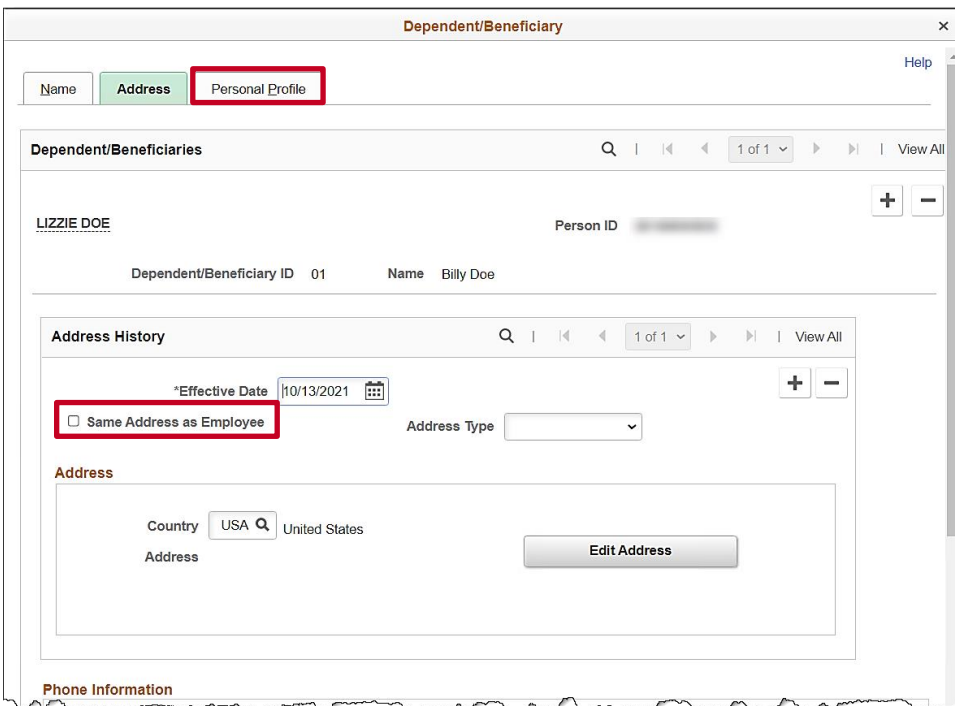
18.   Click **OK.**

The **Dependent Information** page returns.

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

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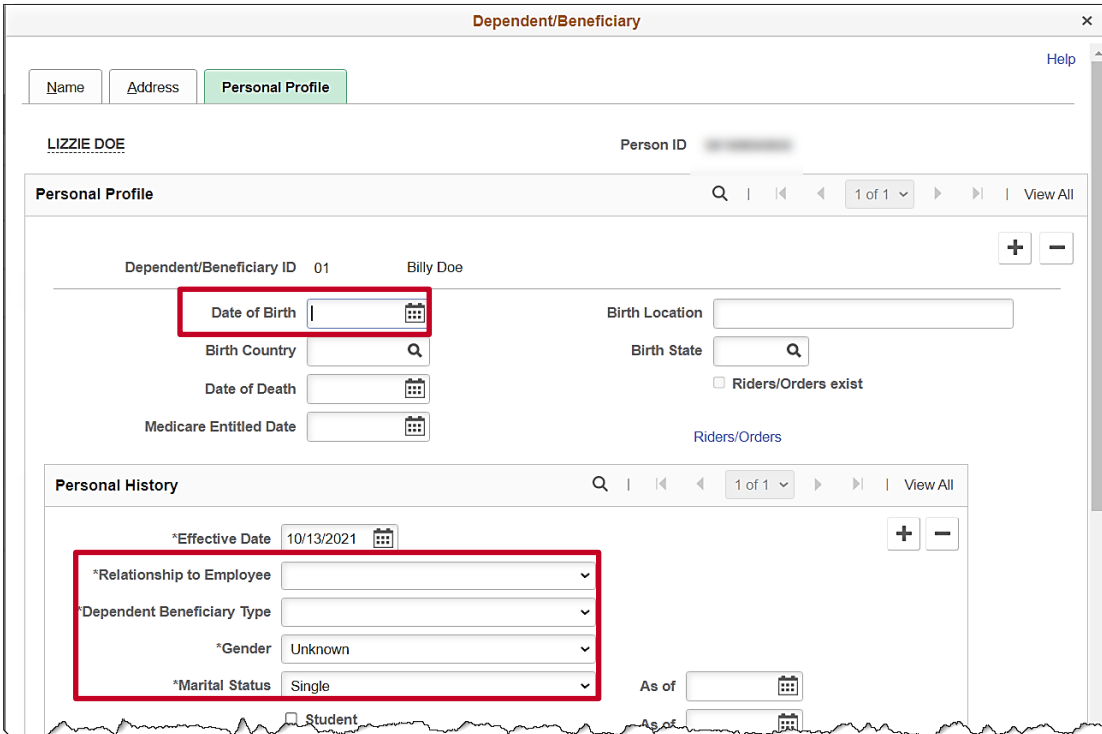
20. Check the box next to **Same Address as Employee.**

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

The **Personal Profile** page displays.

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.

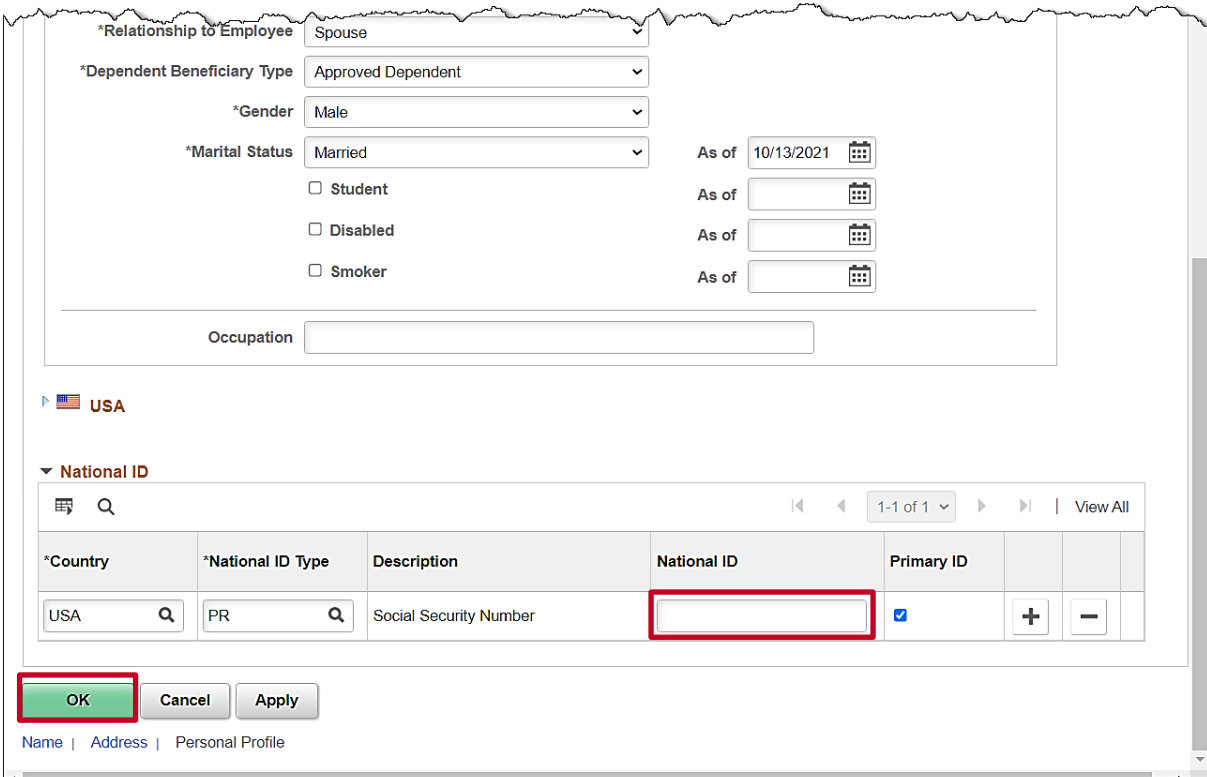   **Note:** The dependent will not receive an insurance card until they are approved.

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.

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.**

The **Election Entry** page returns.

	BenAdmin Data Entry	✕
		Help

| _Event / Participant Selection_ | Option Election | **Dependents / Beneficiaries** |

Schedule ID	EM00	Employee ID		LIZZIE DOE
Event ID	1	Event Data	10/13/2021	Initial Enrollment
Benefit Record	0	Excess Credit Rollover To	Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

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

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents

| OK | Cancel | Apply | | Refresh |

Event / Participant Selection | Option Election | Dependents / Beneficiaries

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

The **Option Election** page returns.

	BenAdmin Data Entry	✕
		Help

| _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

Dependents/Beneficiaries
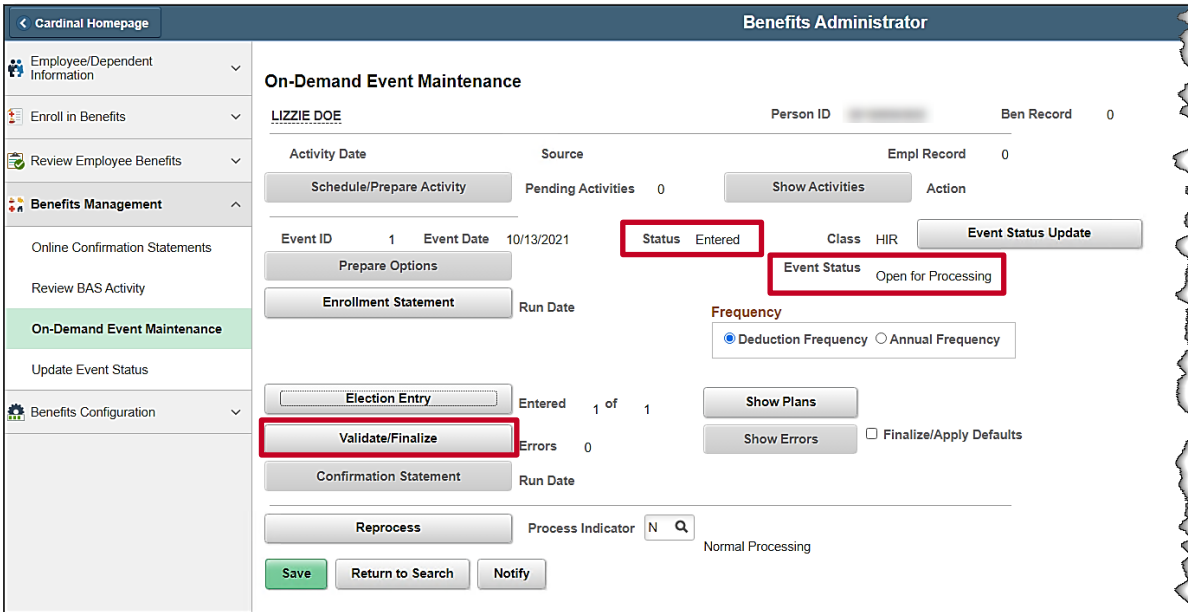
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
🔍				☐		☐	—
+...							

| OK | Cancel | Apply | | Refresh |

Event / Participant Selection | Option Election | Dependents / Beneficiaries

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.

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.

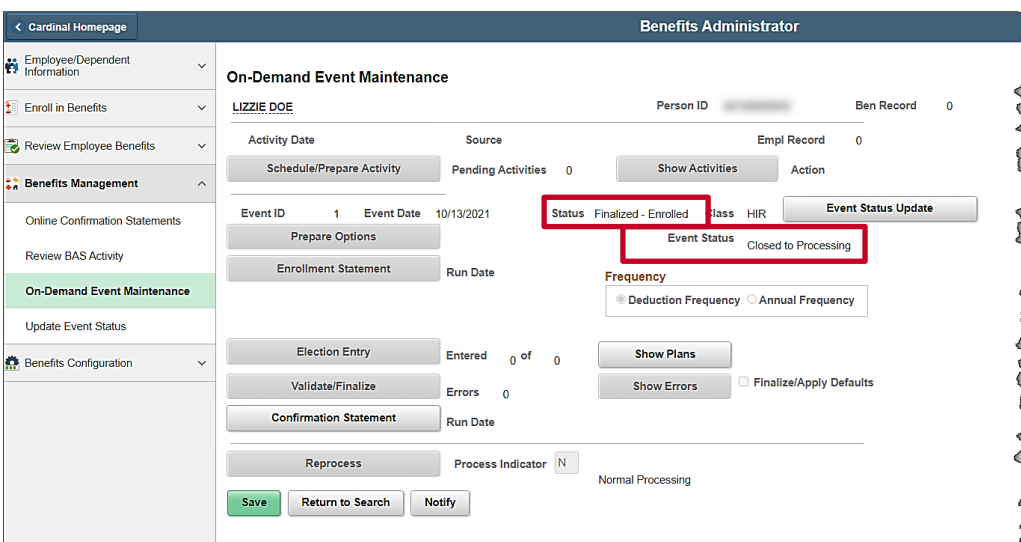The **On-Demand Event Maintenance** page returns.

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.

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