

Managing BA Contacts Overview

This Job Aid provides the steps utilized by Agency Benefits Administrators to manage the BA Contacts for their Business Unit/Group ID(s). It is critically important that the BA Contacts are maintained accurate within Cardinal. When employees make changes via Employee Self-Service (ESS), a notification is sent to the Benefits Administrator Contact Type.

Note: Cardinal recommends using a shared email address or distribution list to allow for notifications to be sent to a broader group of individuals. This Job Aid contains sections that provide the step-by-step instructions used to complete the following:

- · Add a new BA Contact
- · Edit an existing BA Contact
- · Delete an existing BA Contact

This Job Aid does not apply to Agencies participating in The Local Choice Health Benefits Program (TLC). Localities enrolled in TLC should refer to the Job Aid titled **BN361_TLC Data Sheet Locality**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History	2
Adding a New BA Contact	3
Editing an Existing BA Contact	9
Deleting an Existing BA Contact	13



Revision History

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



Adding a New BA Contact

This section of the Job Aid should be used when adding a new BA Contact for a Business Unit/Group ID. There are six types of contacts that can be defined. Please note that each Contact Type is limited to one person.

Step	Action		
1.	Navigate to the BA Contacts page using the following path: NavBar > Menu > Benefits > Employer Information > BA Contacts		
he BA	Contacts Find an Existing Value page displays		
	Cardinal Homepage BA Contacts		
E	A Contacts		
	Find an Existing Value		
	Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.		
-	Recent Searches Choose from recent searches		
	Search by: Business Unit begins with		
	✓ Show more options ☐ Include History ☐ Correct History		
	Search Clear		
i	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid title "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .		
2.	Enter the applicable Business Unit in the Business Unit field.		
	Search by: Business Unit begins with		
3.	Click the Search button.		



	 ✓ Search Results 4 results - Business Unit "101 	00"	
		< < 1-4 of 4	View All
	Business Unit	Group ID	
	10100	101002000	>
	10100	101003000	>
	10100	101005000	>
	10100	101102000	>
4.	Click the Drill In icon () Search Results 4 results - Business Unit '	>) for the corresponding Group ID.	
4.	✓ Search Results	'10100''	of 4 🗸 > > View All
4.	✓ Search Results	'10100''	of 4 🗸 > > View All
4.	✓ Search Results 4 results - Business Unit '	'10100'' < < [1-4	of 4 View All
4.	✓ Search Results 4 results - Business Unit ' Business Unit	'10100'' < < 1-4 Group ID	
4.	Search Results 4 results - Business Unit ' Business Unit 10100	'10100'' I 1-4 Group ID 101002000	>
4.	Search Results 4 results - Business Unit ' Business Unit 10100	'10100'' I 1-4 Group ID 101002000 101003000 101003000	> >



Step	Action					
The BA C	The BA Contacts page displays for the applicable Group ID.					
	Cardinal Homepage BA Contacts 🇌 🤉 🕄					
	New Window Help Personalize Page -					
	Business Unit: 10100 House of Delegates Group ID 101000000 House of Delegates Q_ I I of 2 → I View All					
	Effective Date 03/31/2022 (m) + -					
	Contacts Q, 1 H H 1 of 4 V P N 1 View Al					
	Contact Type Denefits Administrator Contact EIN Q Name Email ID Phone Ext Enter a complete phone number including the area code.					
5.	Click the Add a New Row (+) icon to add a new effective dated row.					
The page	refreshes with a new effective dated row.					
	Cardinal Homepage BA Contacts					
	Business Unit: 10100 House of Delegates Group ID 101003000 House of Delegates Q, 4 1 tof3 V View All					
	Effective Date D6/13/2023 🛗 + -					
	Contacts Q I					
6.	The Effective Date field defaults to the current system date. Update as needed using the Effective Date Calendar icon. Effective Date p6/13/2023					



Step	Action
7.	Add a Contact Type for the new BA Contact. Click the Add a New Row (+) icon within the Contacts section.
	Contacts Q I Id d I of 4 View All
	Contact Type Benefits Administrator
The page	refreshes with the new row.

Cardinal Homepage	BA Contacts	🏫 🔍 🗄 🖞
BA Contacts		New Window Help Personalize Pag
Business Unit: 10100	House of Delegates	
Group ID 101003000	House of Delegates	
	Q III I of 3 - F View All	
Effective Date 06/13/2023	• -	
	·	
Contacts	Q I I I I I I View All	
*Contact Type	• • •	
Contact EIN C		
Name		
Email ID		
Phone	Ext	
Enter a complete phone number i	ncluding the area code.	
Click the Conta	ict Type dropdown button.	
10 million Turns		
*Contact Type	•	

The **Contact Type** menu displays.

Group ID	101003000 House of Delegates	
	Q III of 3 🗸 🕨 View All	
Effective Date	06/13/2023	
Contacts	Q 4 4 2 of 5 v 1 View All	
*Contact Type		
Contact EIN	Benefits Administrator Benefits Executive	
Name	Billing Administrator	
Email ID	HR Administrator HR Executive	
Phone	Ext	



Step	Action		
9.	Select the applicable Contact Type by clicking the corresponding list item based on the following:		
	• The Benefits Administrator is the only required Contact Type and is the only contact who receives email notifications of updates made to dependent information through Employee Self-Service (ESS)		
	 The Benefit Administrator, Benefits Executive, Billing Administrator, and Billing Executive Contact Type details are reported to DHRM 		
	The HR Administrator and HR Executive Contact Types are for informational purposes only in Cardinal		
	Benefits Administrator Benefits Executive Billing Administrator		
- BA (Billing Executive HR Administrator HR Executive		
-	HR Administrator		
	HR Administrator HR Executive		
	HR Administrator HR Executive Contacts page redisplays. Cardinal Homepage BA Contacts		
	HR Administrator HR Executive Contacts page redisplays. Effective Date <pre> 06/13/2023 </pre> Effective Date 06/13/2023 * Contacts * Conta		
	HR Administrator HR Administrator		

Once entered, the **Name**, **Email ID**, and **Phone** fields will automatically populate. Skip to Step 12. If a shared email address is being used, do not populate the **Contact EIN** field. In this case, proceed with Step 11.

Q

A

Contact EIN



Step	Action					
11.	Enter the applicable employee's email address or the shared email address into the Email ID field.					
	Email ID					
12.	Expand the Mailing Address section and Shipping Address section and populate the address information as needed. Mailing Address					
Sample w	ith completed data entry.					
	C Cardinal Morrespues BA Contacts Group ID 10100000 Hesse di Delegares Effective Date Gortacts Q Id Contact Type HR Administrator Contact Type Return to Search Previous In List Natio Add Indude History					
13.	Click the Save button at the bottom of the page.					
i	Repeat these steps for each Group ID within the Business Unit to add the new BA Contact as needed.					



Editing an Existing BA Contact

This section of the Job Aid should be used when editing the information for an existing BA Contact for a Business Unit/Group ID. This functionality can be used to edit information such as the BA Contact's phone number information and address information. A group email address can also be edited using this functionality.

Step	Action				
1.	Navigate to the BA Contacts page using the following path: NavBar > Menu > Benefits > Employer Information > BA Contacts				
The BA	Contacts Find an Existing Value page displays.				
	Cardinal Homepage BA Contacts				
	A Contacts Find an Existing Value				
	Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Orecent Searches Choose from recent searches P Saved Searches Choose from saved searches P				
	Search by: Business Unit begins with Show more options Include History Correct History Search Clear				
i	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .				
2.	Enter the applicable Business Unit in the Business Unit field. Search by: Business Unit begins with				
3.	Click the Search button.				



Step	Action			
The page	refreshes and the sea	rch results display at the bottom of the p	age.	
	 ✓ Search Results 4 results - Business Unit "10 	0100"		
		<	> > View All	
	Business Unit	Group ID		
	10100	101002000	>	
	10100	101003000	>	
	10100	101005000	>	
	10100	101102000	>	
4.	Click the Drill In icon	(>) for the corresponding Group ID.		
	 ✓ Search Results 4 results - Business Uni 	it "10100"		
		I< < 1-4 of 4	✓ > > View All	
	Business Unit	Group ID		
	10100	101002000	>	
	10100	101003000	>	
	10100	101005000	>	
	10100	101102000	>	
1	Each Group ID must	be updated individually.		



Step	Action			
The BA Contacts page displays for the applicable Group ID.				
	Cardinal Homepage BA Contacts A C : (2)			
	New Window Help Personalize Page - BA Contacts			
	Business Unit: 10100 House of Delegates			
	Group ID 101003000 House of Delegates Q, I I 1 of 2 ∨ ▶ ▶ ₩ View All			
	Effective Date 03/31/2022			
	Contacts Q, I H 4 1 of 4 v + H I View Al			
	Contact Type Benefits Administrator			
	Contact EIN Q			
	Email ID			
	Phone Ext			
	Enter a complete phone number including the area code.			
İ	A new effective dated row must be created before making the required edits to the BA Contact information.			
5.	Click the Add a New Row (+) icon to add a new effective dated row.			
	I of 4 View All			
	+ -			
The page	refreshes with a new effective dated row.			
	Cardinal Homepage BA Contacts I I			
	New Window Help Personalize Page = BA Contacts			
	Business Unit: 10100 House of Delegates			
	Group ID 101000000 House of Delegates Q, I4 4 1 of 3 • I+ Mew All			
	Effective Date 09/13/2023			
	Contacts Q, I H 4 1of 4 > H I View All			
	Contact Type Benefits Administrator			
	Contact EIN Q			
	Email ID			
	Phone Ext			
	Enter a complete phone number including the area code.			



Step	Action		
6.	The Effective Date field defaults to the current system date. Update as needed using the Effective Date Calendar icon.		
	Effective Date D6/13/2023		
7.	Click the View All link within the Contacts sections.		
	Contacts Q, I I I of 4 ▾ I I View All		
The page refreshes and all rows within the Contacts section are displayed. Scroll down to the Contact Type that requires editing.			
	C Cardinal Homepage BA Contacts ♠ Q. ; @		
	Poetal 22219		
	Centant type Billing Executive		
	Contact EIN Q, Name		
	Envil D Ent		
	Enter a complete phone number including the area code.		
	Mailing Address Address		
	Address 2		
	Stee		
	Shipping Address		
	Seve Return to Search Previous in List Next in List Add Include History		
	Edits can be made to the phone information or the address information. Group email		
	address information can also be edited. If edits are required to the name or Contact EIN, the		
	existing BA contact should be deleted and the new BA Contact should be added.		
8.	Click the Save button.		
	Save Return to Search Previous in List Next in List		
	Repeat these steps for each Group ID within the Business Unit to edit this BA Contact as		
	needed.		



Deleting an Existing BA Contact

This section of the Job Aid should be used when deleting an existing BA Contact for a Business Unit/Group ID.

Step	Action	
1.	Navigate to the BA Contacts page using the following path: NavBar > Menu > Benefits > Employer Information > BA Contacts	
The B A	Contacts Find an Existing Value page displays.	
	Cardinal Homepage BA Contacts	
	BA Contacts	
	Find an Existing Value	
	Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.	
	🔁 Recent Searches Choose from recent searches 🗸 🎢 🖓 Saved Searches Choose from saved searches 🗸	
	Search by: Business Unit begins with Show more options Include History Clear Clear	
i	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .	
2.	Enter the applicable Business Unit in the Business Unit field.	
	Search by: Business Unit begins with	
3.	Click the Search button.	
	Search Clear	



bag	e refreshes and the sea	rch results display at the bottom of the	e page.
	 ✓ Search Results 4 results - Business Unit "1 	10100"	
		<	✓ > > View All
	Business Unit	Group ID	
	10100	101002000	>
	10100	101003000	>
	10100	101005000	>
	10100	101102000	>
	Click the Drill In icon (>)) for the corresponding Group ID.	
	Click the Drill In icon (>) Search Results 4 results - Business Unit "1) for the corresponding Group ID.	✓ >> > View All
	✓ Search Results	10100"	→ >> View All
	✓ Search Results 4 results - Business Unit "1	0100" <	✓ >> > View All
	✓ Search Results 4 results - Business Unit "1 Business Unit	10100" < < 1-4 of 4 Group ID	
	Search Results 4 results - Business Unit "1 Business Unit 10100	I0100" I< < 1-4 of 4 Group ID 101002000	>
	Search Results 4 results - Business Unit "1 Business Unit 10100	I0100" I< < 1-4 of 4 Group ID 101002000 101003000	> >



Step	Action			
The BA Contacts page displays for the applicable Group ID.				
	Cardinal Homepage BA Contacts A C			
	New Window Help Personalize Page -			
	Business Unit: 10100 House of Delegates Group IID 101003000 House of Delegates			
	Q, 4 4 1 of 2 → ▶ ▶ View All Effective Date 03/31/2022 (1) + -			
	Contact Type Benefits Administrator Contact EIN Q			
	Name			
	Email ID Phone Ext			
	Enter a complete phone number including the area code.			
j	A new effective dated row must be created before making the required edits to the BA Contact information.			
5.	Click the Add a New Row (+) icon to add a new effective dated row.			
	I of 4 → ► ► I View All			
	+ -			
The pa	ge refreshes with a new effective dated row.			
•	Cardinal Homepage BA Contacts I I			
	New Window Help Personalize Page -			
	Business Unit: 10100 House of Delegates			
	Group ID 101003000 House of Delegates Q, I 1 of 3 マ ▶ ▶ View All			
	Effective Date 09/13/2023 🗃 + -			
	Contacts Q 4 4 1of4 > ► ► I View All			
	Contact Type Benefits Administrator Contact EIN Q			
	Name			
	Email ID Phone Ext			
	Enter a complete phone number including the area code.			



Step	Action		
6.	The Effective Date field defaults to the current system date. Update as needed using the Effective Date Calendar icon.		
	Effective Date D6/13/2023		
7.	Click the View All link within the Contacts sections.		
	Contacts Q 4 4 1 of 4 V I View All		
The page refreshes and all rows within the Contacts section are displayed. Scroll down to the BA Contact that needs to be deleted.			
	c Carifinal Homopage BA Contacts ♠ Q : Ø State VA Q Postal 22319 P		
	Contact Tops Billing Decoline		
	Contact EN C.		
	Enall D Phone Ext Enter a complete phone number including the area code.		
	■ Mailing Address Address		
	Address 2 City State		
	Postal		
	Shipping Address Save Return to Search Previous in List. Next in List. Add Include History		
0	Click the Delete Devices () for the emplicable DA Contest		
8.	Click the Delete Row icon (-) for the applicable BA Contact.		
	*Contact Type Billing Executive		
A Conf	irmation message displays in a pop-up window.		
	Delete current/selected rows from this page? The delete will occur when the transaction is saved.		
	OK Cancel		
9	Click the OK button to confirm the deletion.		
	ΟΚ		



Step	Action			
The BA Contacts page redisplays.				
	C Cardial Honespage BA Contlacts Store 0 Petal 2210 Contact Syse 0 Contact Sysee 0 Contact Sysee 0 Contact Sysee 0 Contact Sysee 0 Contact System 0 Contact Sysee			
j	The deleted BA Contact no longer displays.			
10.	Click the Save button.			
	Save Return to Search Previous in List Next in List			
i	Repeat these steps for each Group ID within the Business Unit to delete this BA Contact as needed.			