Benefits Job Aid

Processing a Life Event during Open Enrollment Overview

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take when processing a Life Event during Open Enrollment (OE). These actions will ensure that the life event changes are reflected in the OE elections and are transmitted to the vendors.
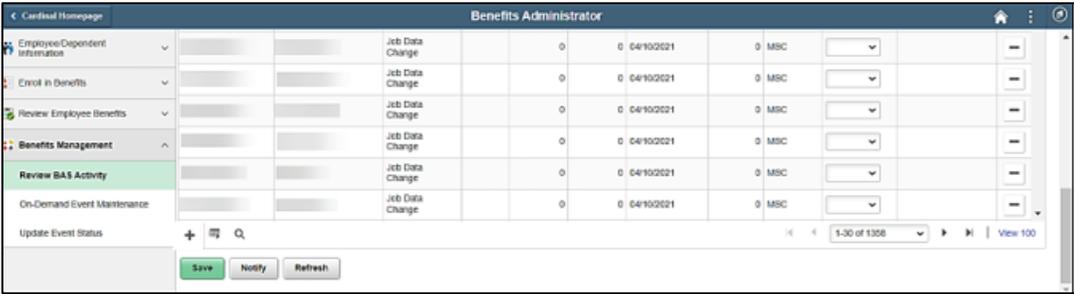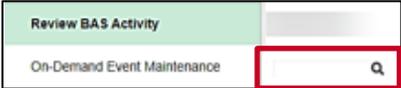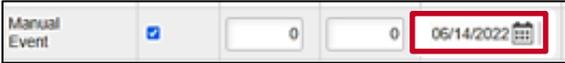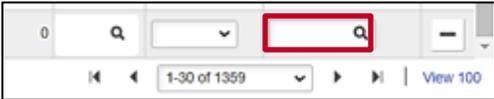
Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

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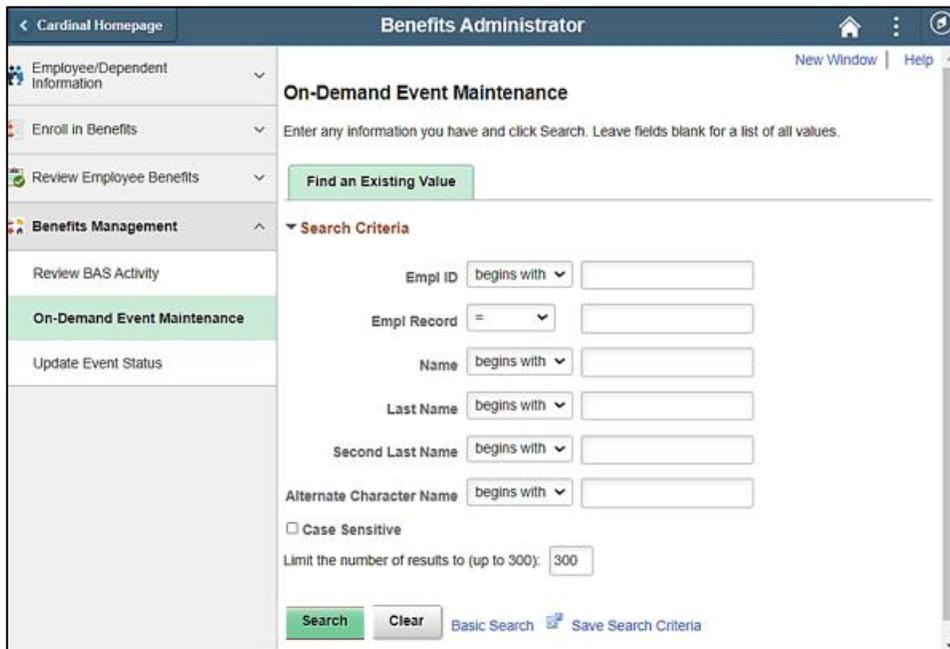
![Cardinal logo]

Processing a Life Event during Open Enrollment (OE)

Prior to entering a Life Event, the user must review the employee's OE selections and document any changes made during OE for both Health and FSA (Medical and Dependent Care).

Step	Action
1.	Navigate to the **Review BAS Activity** page using the following path: **Benefit Administrator Tile > Benefits Management > Review BAS Activity**
	The **Review BAS Activity** page displays.
2.	Click the **Add a Row** (**+**) icon at the bottom of the page.
3.	Enter the applicable employee's Employee ID in the **Empl ID** field.
4.	Enter or select the applicable event date in the **Event Date** field.
5.	Click the **BAS Action Look Up** icon and select the applicable type of life event.
6.	Click the **Save** button.

Step	Action
7.	Next, process the Benefit Event. Navigate to the **On-Demand Maintenance** page using the following path: **Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance**
	The **On-Demand Event Maintenance Search** page displays.
8.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
9.	Click the **Search** button.

Step	Action

The **On-Demand Event Maintenance** page displays.
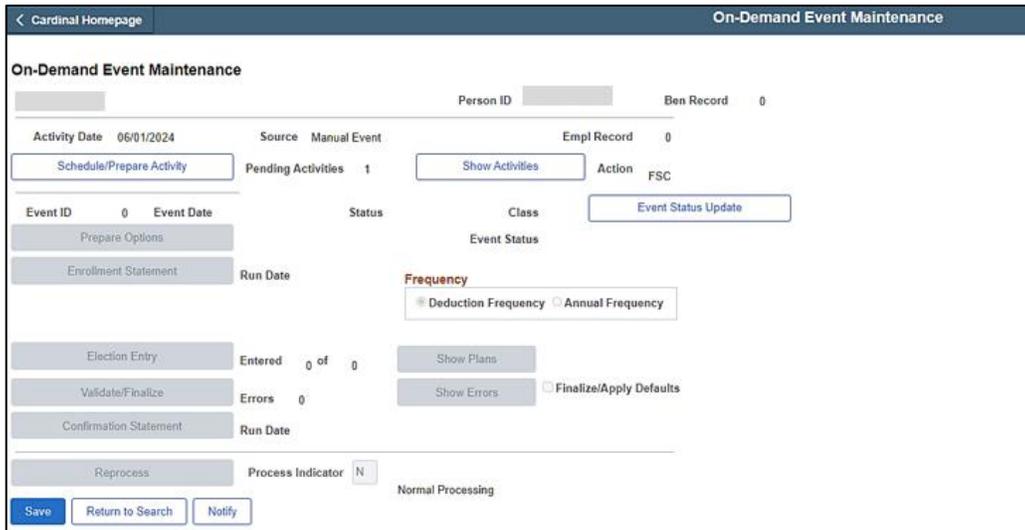
10.	Click the **Schedule/Prepare Activity** button. Schedule/Prepare Activity

ℹ	If the **Schedule/Prepare Activity** button is disabled, the Ben Admin process has already prepared the Benefit Event. Proceed to the next step.

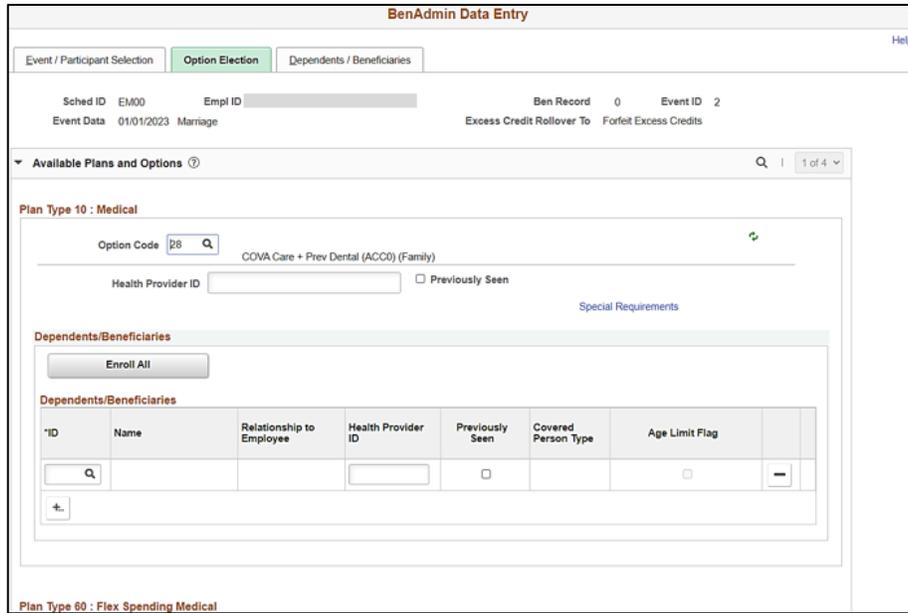Once the process completes, a **Message** displays in a pop-up window.

Process completed successfully. (3000,530)

OK

11.	Click the **OK** button. OK

ℹ	The **Status** field now displays "Prepared" and the **Event Status** field now displays "Open for Processing". Status Prepared Class DIV Event Status Update Event Status Open for Processing

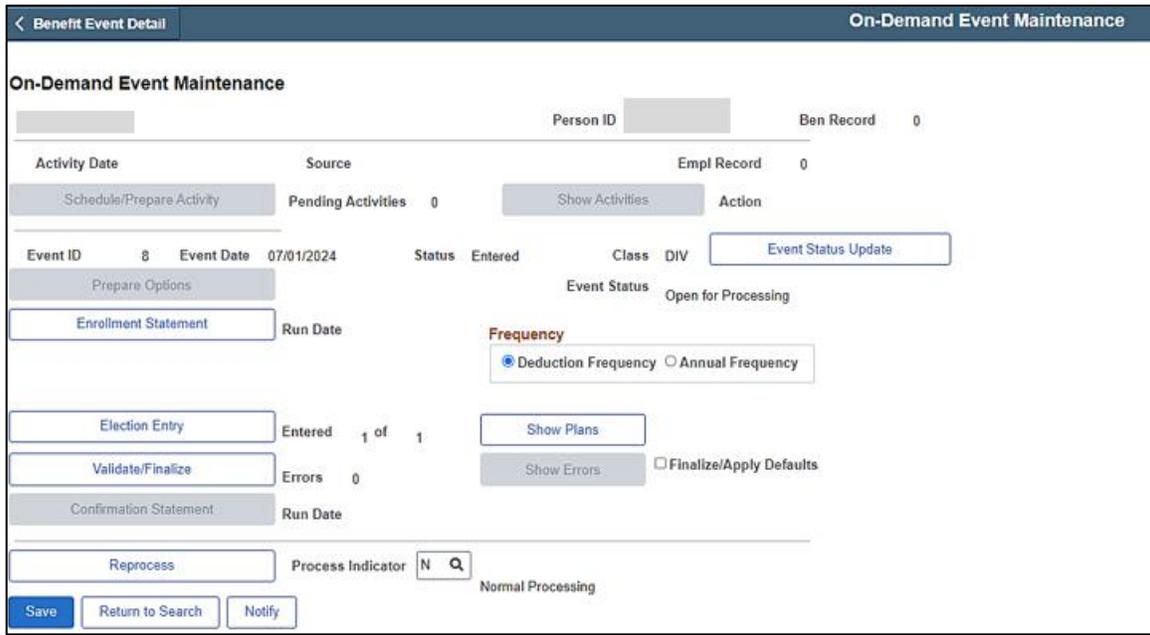| Step	Action
12.	Click the **Election Entry** button. Election Entry
	The **BenAdmin Data Entry** page displays in a pop-up window.
13.	Update the employee's benefit elections as needed.
14.	Once all of the applicable elections have been updated, click the **OK** button at the bottom of the page.

Step	Action
The **On-Demand Event Maintenance** page redisplays	

15.	Click the **Validate/Finalize** button.
	Validate/Finalize

Once the process completes, a **Message** displays in a pop-up window.

Process completed successfully. (3000,530)

OK

16.	Click the **OK** button.
	OK
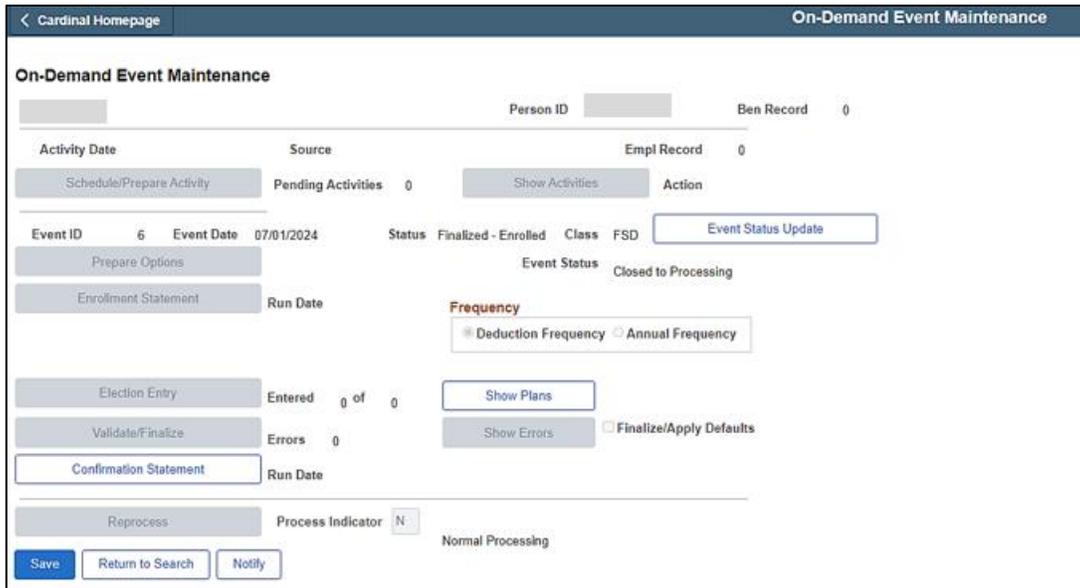
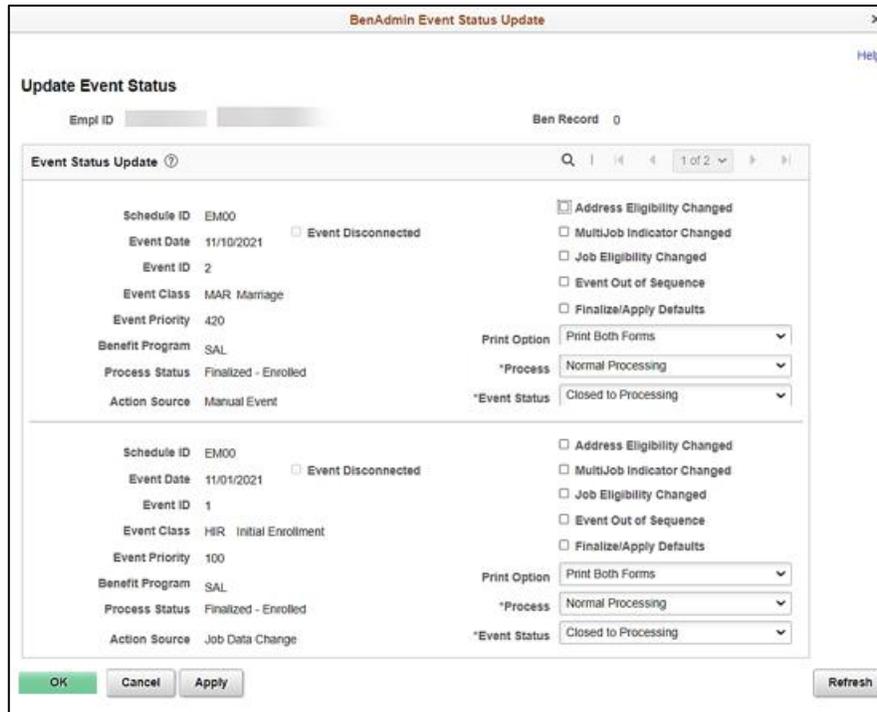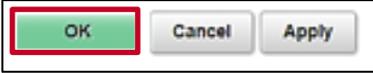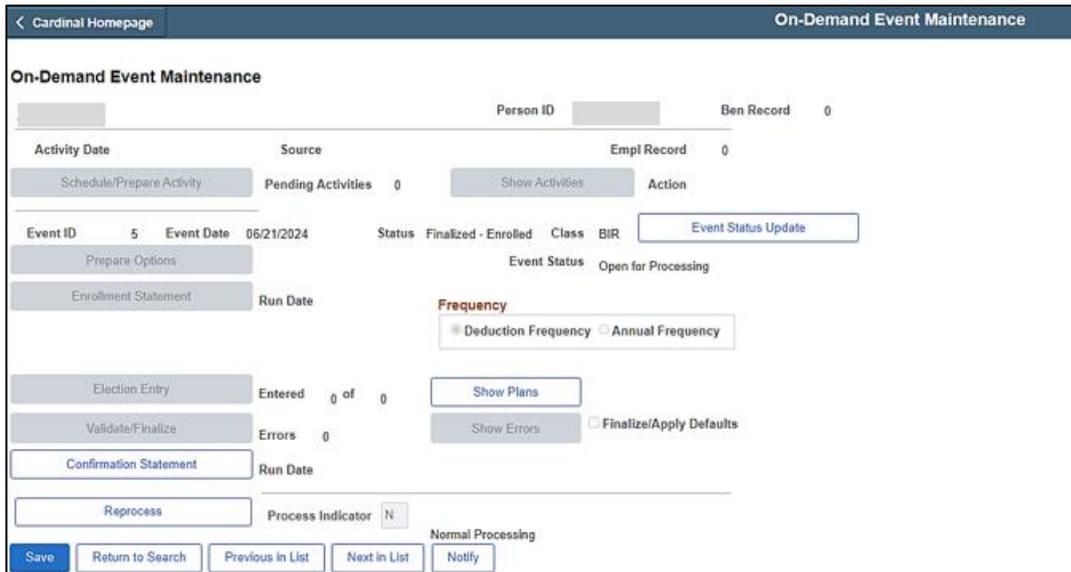| Step	Action
	The **On-Demand Event Maintenance** page redisplays.
ℹ	The **Status** field now displays "Finalized – Enrolled" and the **Event Status** field now displays "Closed to Processing".
15.	Click the **Event Status Update** button and review the employee's Benefit Events.

Step	Action
	The **BenAdmin Event Status Update** page displays in a pop-up window.
16.	Locate the applicable Benefit Event and then click the corresponding **Process** dropdown button and select "Assign Benefit Program".
17.	Click the **Event Status** dropdown button and select "Open for Processing".
18.	Click the **OK** button.
🛈	This will wipe away the enrollments the employee made to OE prior to the Life Event. Be sure to have noted the employee's elections. This is an important step because it allows the user to pull in the changes that were made in the Life Event into the OE Enrollment.

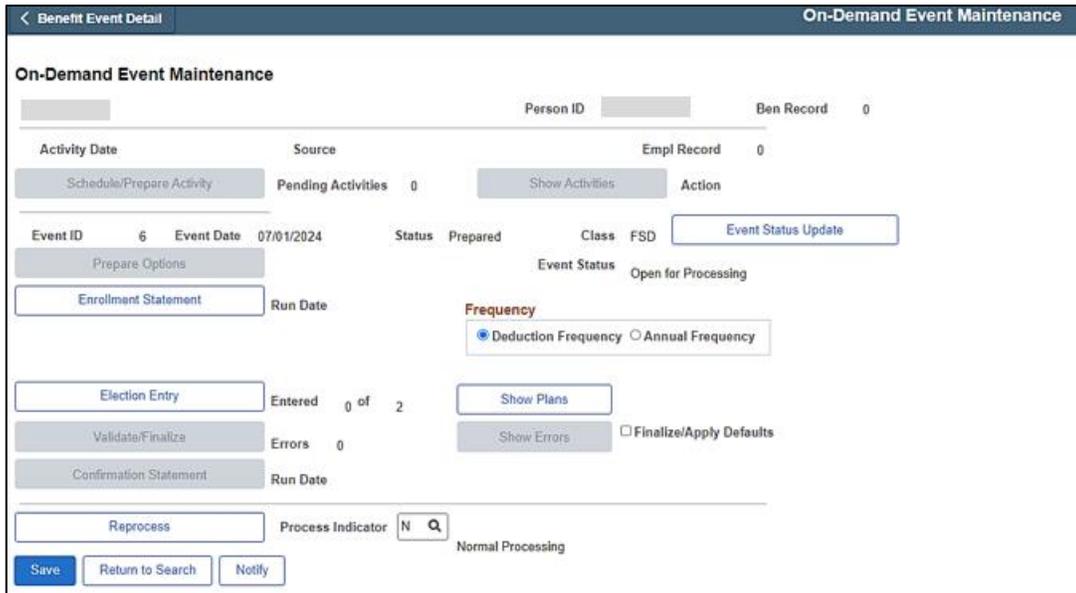| Step	Action
	The **On-Demand Event Maintenance** page redisplays.
ℹ	The **Status** field still displays "Finalized – Enrolled" and the **Event Status** field now displays "Open for Processing".
19.	Click the **Reprocess** button.
	Once the process completes, a **Message** displays in a pop-up window.
20.	Click the **OK** button.

Step	Action
The **On-Demand Event Maintenance** page redisplays.	

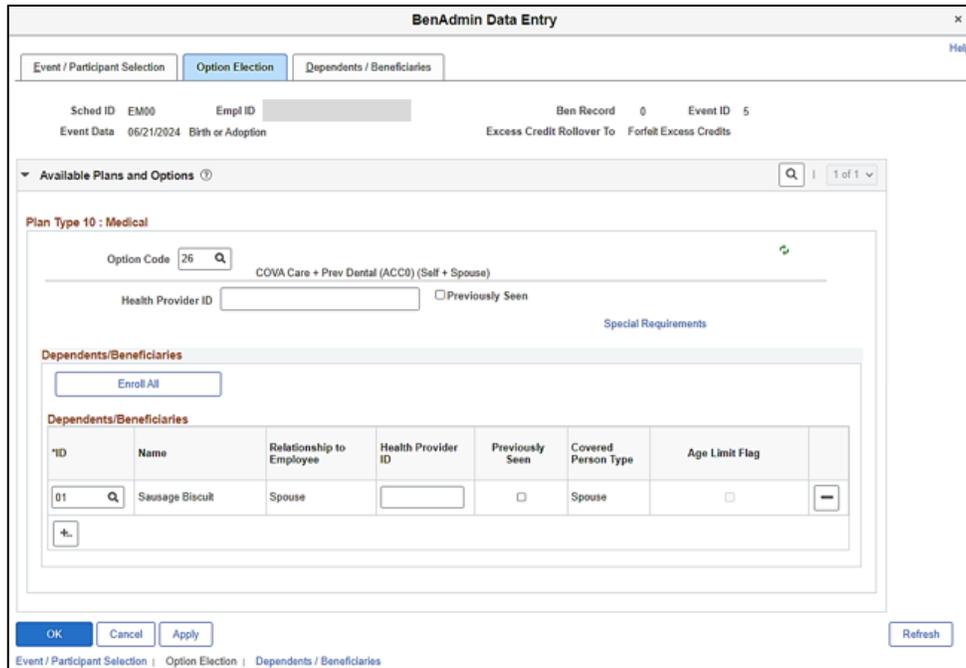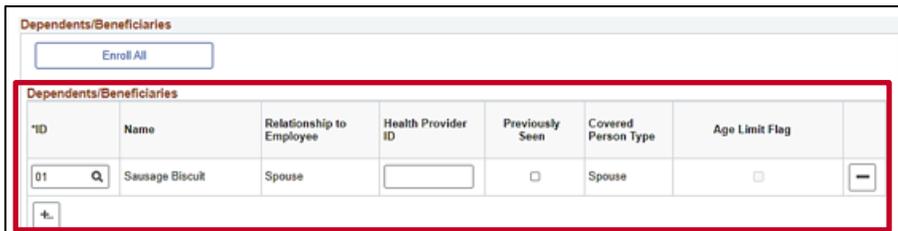|	The **Status** field now displays "Prepared" and the **Event Status** field still displays "Open for Processing.
21.	Click the **Election Entry** button.

Election Entry

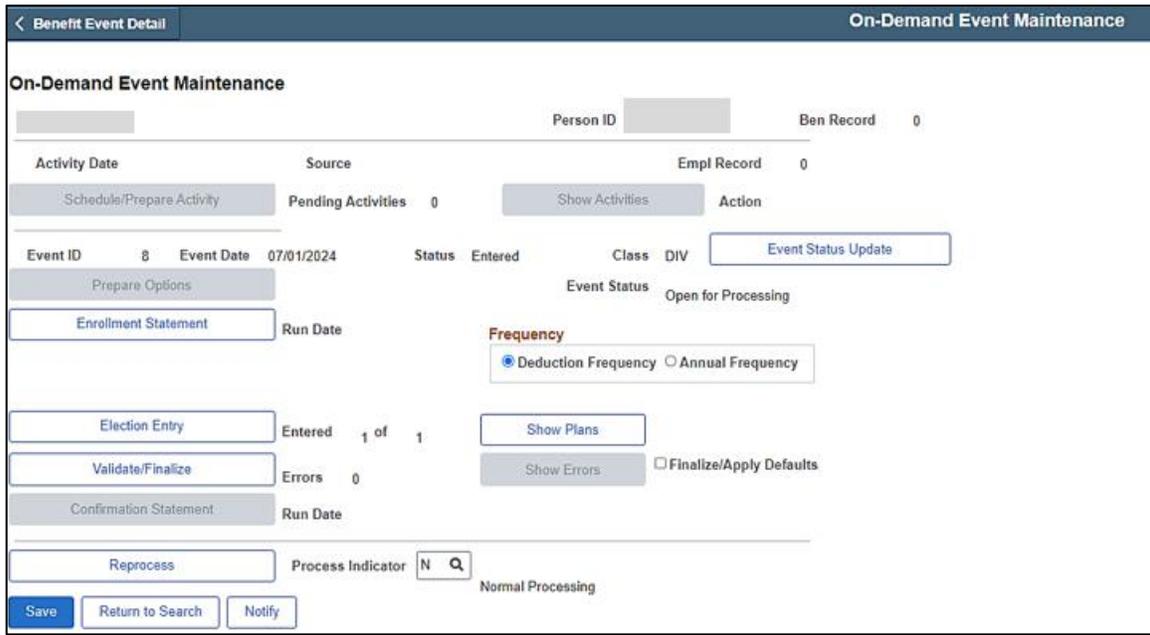| Step	Action
	The **BenAdmin Data Entry** page displays in a pop-up window.
22.	Update the employee's enrollment elections for Open Enrollment (OE).
23.	Click the **OK** button at the bottom of the page after all elections have been updated.

Step	Action
	The **On-Demand Event Maintenance** page redisplays.
(i)	The **Status** field now displays "Entered" and the **Event Status** field still displays "Open for Processing".
24.	Click the **Validate/Finalize** button.
	Once the process completes, a **Message** displays in a pop-up window. Process completed successfully. (3000,530) OK
25.	Click the **OK** button.
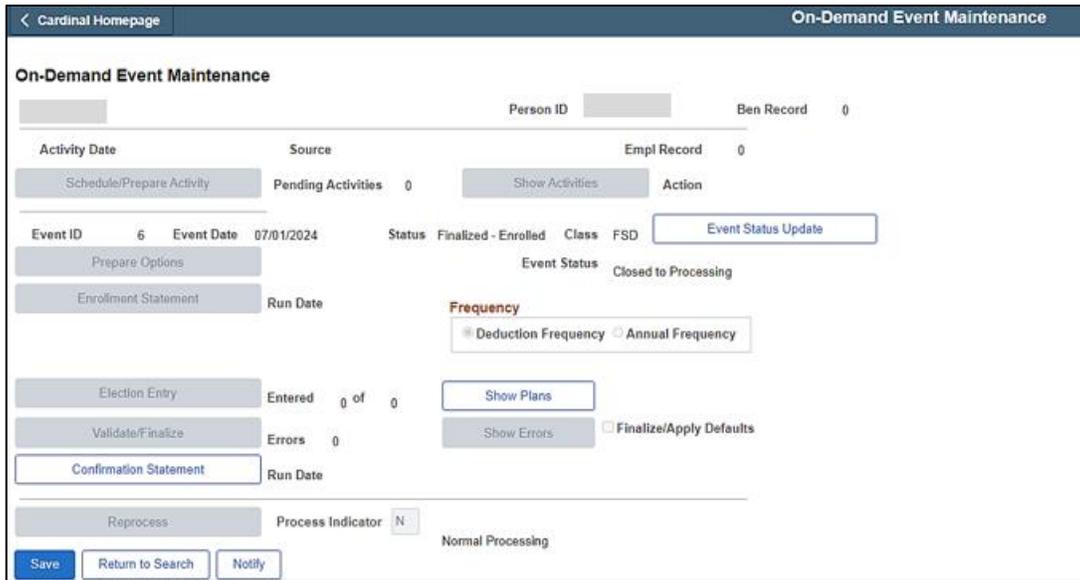
Step	Action
	The **On-Demand Event Maintenance** page redisplays.
ⓘ	Confirm that the **Status** field now displays "Finalized – Enrolled" and that the **Event Status** field now displays "Closed to Processing".
26.	Click the **Save** button.