



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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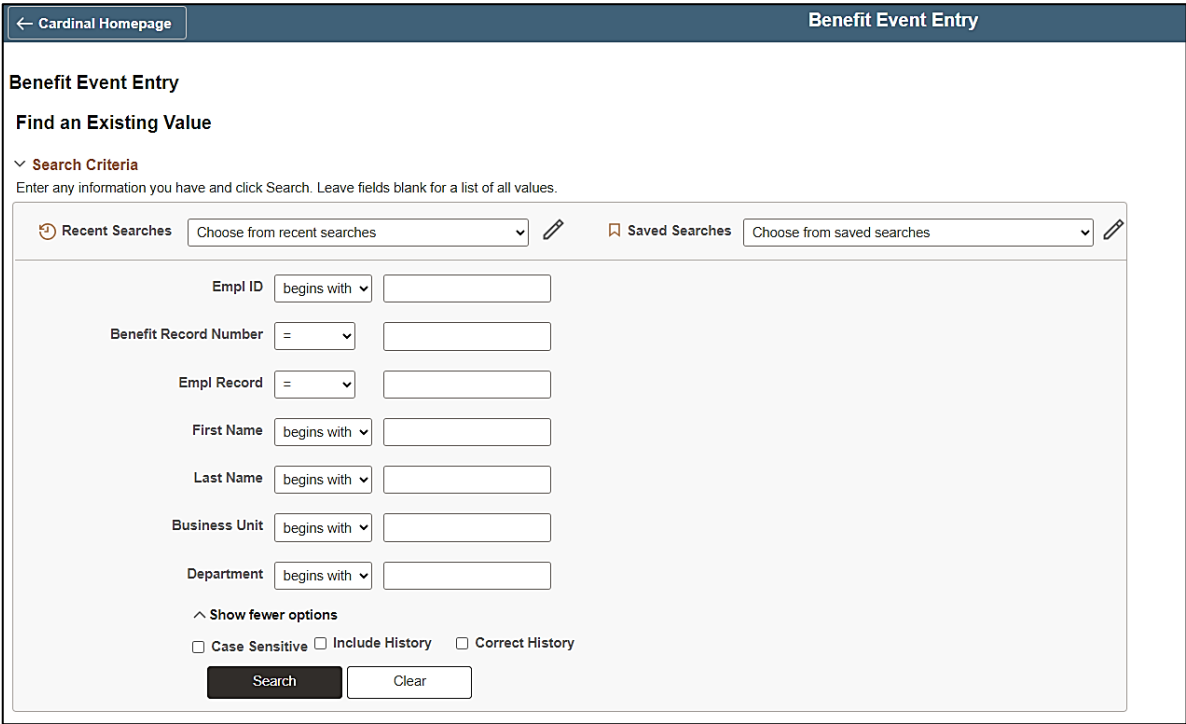

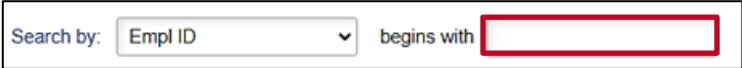


Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1 ; after Steps 1 and 12). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

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.	<p>Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event</p> <p>The Benefit Event Entry Find an Existing Value page displays.</p> 
	<p>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.</p>
2.	<p>Enter the employee's Employee ID in the Search by field.</p> <p>Note: The other search by options available (Search by dropdown button) are Business Unit, Department, and Name.</p> 



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Step	Action
3.	Click the Search button. <div><div>Search</div><div>Clear</div></div>

The **Benefit Event** page displays for the applicable employee.

Benefit Event Detail

Employee

ID

Benefit Record Number 0

Life Event

1 of 1

View All

Life Event

Life Event Date

Paperwork Receipt Date

Health Change

Health Change Needed:

Current Cov. Level:

Change:

FSA Change

FSA Change Needed:

Change:

Special Processing Message (Health)

Special Processing Message (FSA)

Save


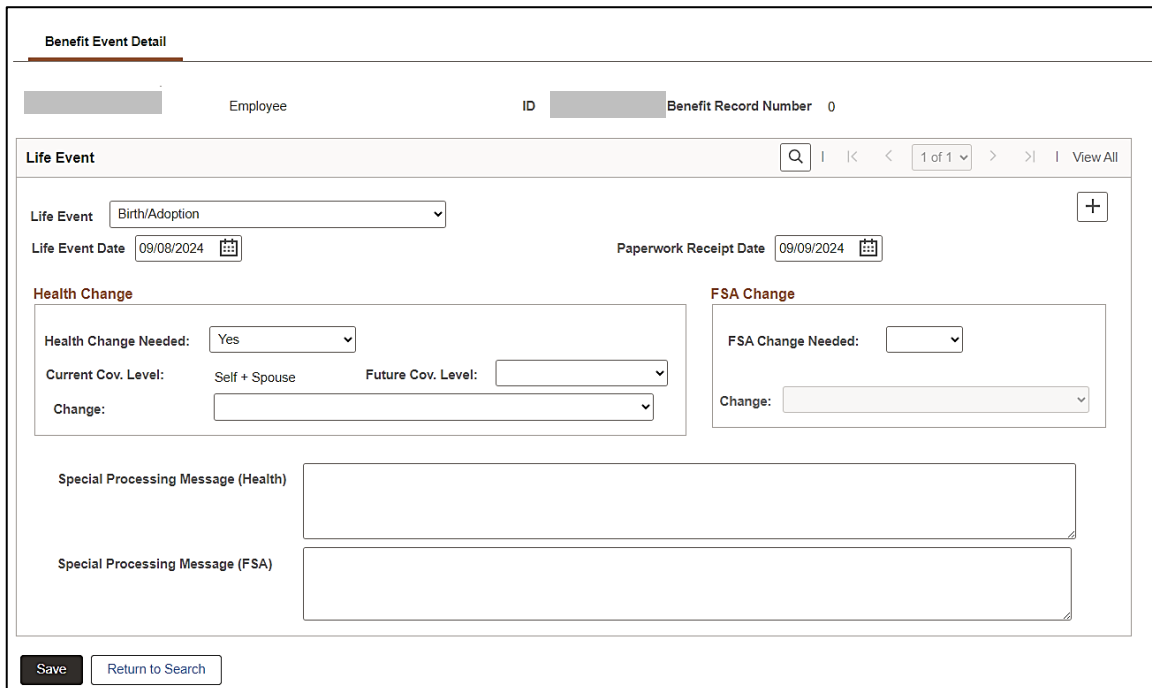




Return to Search


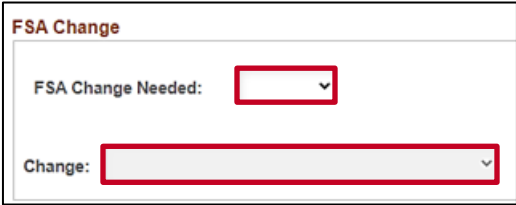
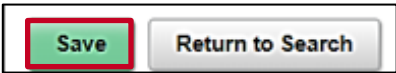

4.	Click the Life Event dropdown button and select the applicable life event ("Birth/Adoption" in this scenario). <div><div>Life Event</div></div>
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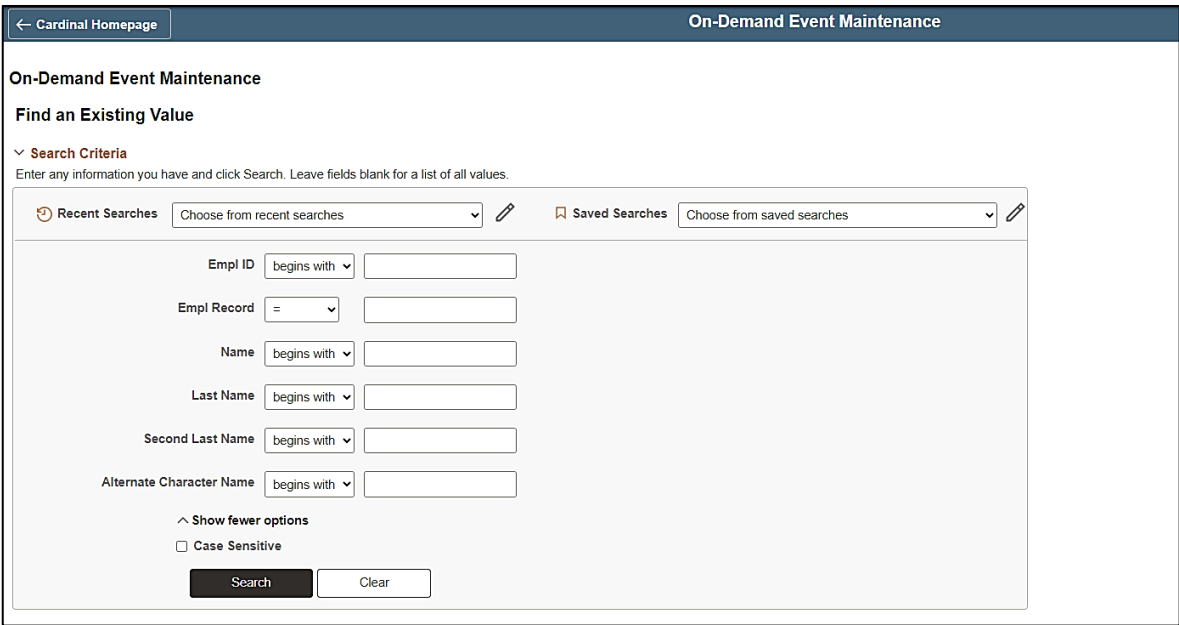





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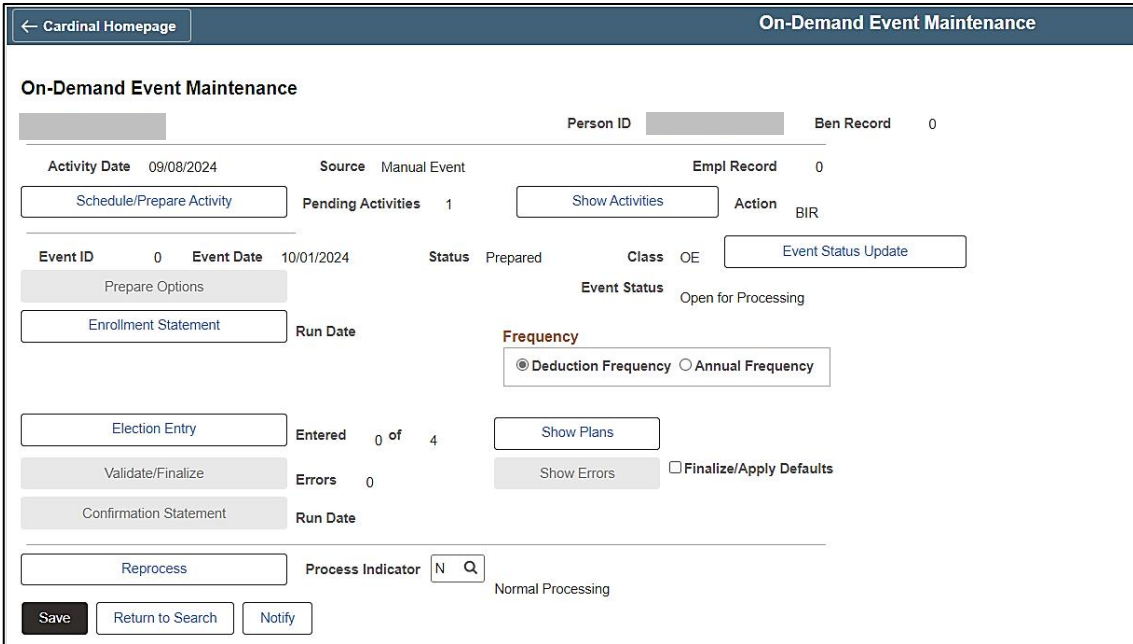


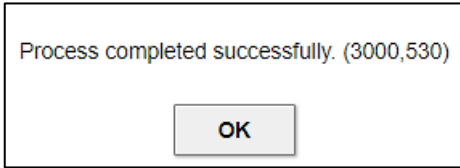

Step	Action
	<p>The Benefit Event page redisplay with the selected Life Event.</p> <div><div><div><div>Benefit Event Detail</div><div><div>Employee ID [redacted] Benefit Record Number 0</div><div><div>Life Event</div><div>Life Event Birth/Adoption</div><div>Life Event Date [calendar icon]</div><div>Paperwork Receipt Date [calendar icon]</div><div><div>Health Change</div><div><div>Health Change Needed: [dropdown]</div><div>Current Cov. Level: [dropdown] Future Cov. Level: [dropdown]</div><div>Change: [dropdown]</div></div><div><div>FSA Change</div><div>FSA Change Needed: [dropdown]</div><div>Change: [dropdown]</div></div><div>Special Processing Message (Health) [text area]</div><div>Special Processing Message (FSA) [text area]</div><div><div>Save</div><div>Return to Search</div></div></div></div></div></div></div></div>
5.	<p>Click the Life Event Date Calendar icon and select the applicable date.</p> <div><div>Life Event Date [calendar icon]</div></div>
	<p>This is the date of the actual event (marriage, birth, divorce, etc.).</p>
6.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date.</p> <div><div>Paperwork Receipt Date [calendar icon]</div></div>
	<p>This is the date that the Benefits Enrollment form was received from the employee.</p>
7.	<p>Click the Health Change Needed dropdown button and select "Yes".</p> <div><div>Health Change Needed: [dropdown]</div></div>

Step	Action
	Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes” (i.e., this is a birth event, and the employee is already enrolled in “Family” coverage. However, a new dependent is being added (newborn)). If “Yes” is not selected, a Benefit Event will not be created.
<p>The Benefit Event page refreshes.</p> <div data-bbox="240 581 1385 1264" data-label="Form">  </div>	
	The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.
8.	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> <div data-bbox="289 1465 844 1533" data-label="Form">  </div>
	The coverage levels available for selection are “Single, Employee”, “Employee + Spouse”, “Employee + CH (Child)”, and “Family”. Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed.
9.	<p>Click the Change dropdown button and select the applicable change reason (“Add new child - adoption” in this scenario).</p> <div data-bbox="289 1787 997 1850" data-label="Form">  </div>

Step	Action
	The selections available will vary based on the type of Life Event previously selected.
10.	<p>Complete the fields within the FSA Change section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee's FSA elections will be made for this scenario).</p> 
11.	<p>Click the Save button.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions.</p> <p>If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
12.	<p>Navigate to the On-Demand Event Maintenance page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>


Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> 
	<p>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.</p>
13.	<p>Enter the employee’s Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee’s name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
14.	<p>Click the Search button.</p> 

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Step	Action
	<p>The On-Demand Event Maintenance page displays for the applicable employee.</p> 
15.	<p>Click the Schedule/Prepare Activity button.</p> 
	<p>If the Schedule/Prepare Activity button is disabled, the Ben Admin process has already prepared the Benefit Event. Proceed to the next step.</p>
	<p>Once the process completes, a Message displays in a pop-up window.</p> 
16.	<p>Click the OK button.</p> 



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Step	Action
	<p>The Status field now displays “Prepared” and the Event Status field now displays “Open for Processing”.</p> <div><div>StatusPreparedClassBIREvent StatusOpen for ProcessingEvent Status Update</div></div>
17.	<p>Click the Election Entry button.</p> <div>Election Entry</div>

The **BenAdmin Data Entry** page displays in a pop-up window.

BenAdmin Data Entry

Event / Participant SelectionOption ElectionDependents / Beneficiaries

Sched ID EM00Empl IDBen Record 0Event ID 3
Event Data 09/08/2024 Birth or AdoptionExcess Credit Rollover ToForfeit Excess Credits

Available Plans and Options1 of 1

Plan Type 10 : Medical

Option Code 22Kaiser HMO (KP) (Self + Spouse)
Health Provider IDPreviously SeenSpecial Requirements

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

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

OKCancelApplyRefresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries



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Step	Action																																
18.	<p>Update the employee’s benefit elections as needed (in this scenario, the coverage code was updated to “Family” and the additional dependent was added).</p> <div><p>Plan Type 10 : Medical</p><div><div>Option Code 24 </div><div>Kaiser HMO (KP) (Family) </div><div>Health Provider ID <input type="text"/> <input type="checkbox"/> Previously Seen</div><div>Special Requirements</div><div><p>Dependents/Beneficiaries</p><div>Enroll All</div><p>Dependents/Beneficiaries</p><table><thead><tr><th>*ID</th><th>Name</th><th>Relationship to Employee</th><th>Health Provider ID</th><th>Previously Seen</th><th>Covered Person Type</th><th>Age Limit Flag</th><th></th></tr></thead><tbody><tr><td>01 </td><td></td><td>Spouse</td><td><input type="text"/></td><td><input type="checkbox"/></td><td>Spouse</td><td><input type="checkbox"/></td><td></td></tr><tr><td>02 </td><td></td><td>Child</td><td><input type="text"/></td><td><input type="checkbox"/></td><td>Child</td><td><input checked="" type="checkbox"/></td><td></td></tr><tr><td colspan="8"></td></tr></tbody></table></div></div></div>	*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		01		Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>		02		Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>									
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag																											
01		Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>																											
02		Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>																											
19.	<p>Once all of the applicable elections have been updated, click the OK button at the bottom of the page.</p> <div><div><div>OK</div><div>Cancel</div><div>Apply</div></div></div>																																

The **On-Demand Event Maintenance** page redisplay

← Cardinal Homepage

On-Demand Event Maintenance

On-Demand Event Maintenance

Person ID

Ben Record 0

Activity Date

Source

Empl Record 0

Pending Activities 0

Action

Event ID 3

Event Date 09/08/2024

Status Entered

Class BIR

Event Status Open for Processing

Run Date

Frequency ☒ Deduction Frequency ☐ Annual Frequency

Entered 1 of 1

Errors 0


☐ Finalize/Apply Defaults

Run Date

Process Indicator N

Normal Processing

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Step	Action
20.	Click the Validate/Finalize button. 

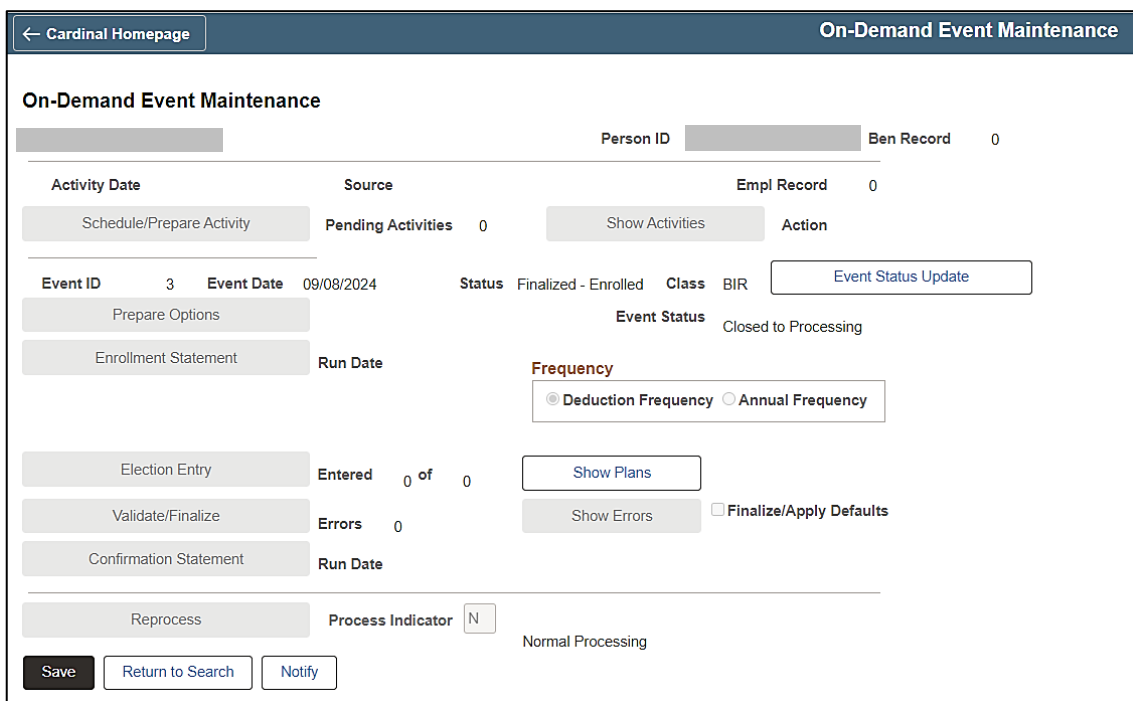
Once the process completes, a **Message** displays in a pop-up window.

Process completed successfully. (3000,530)

OK

21.	Click the OK button. 
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The **On-Demand Event Maintenance** page redisplay.



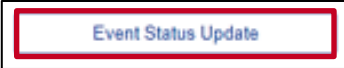
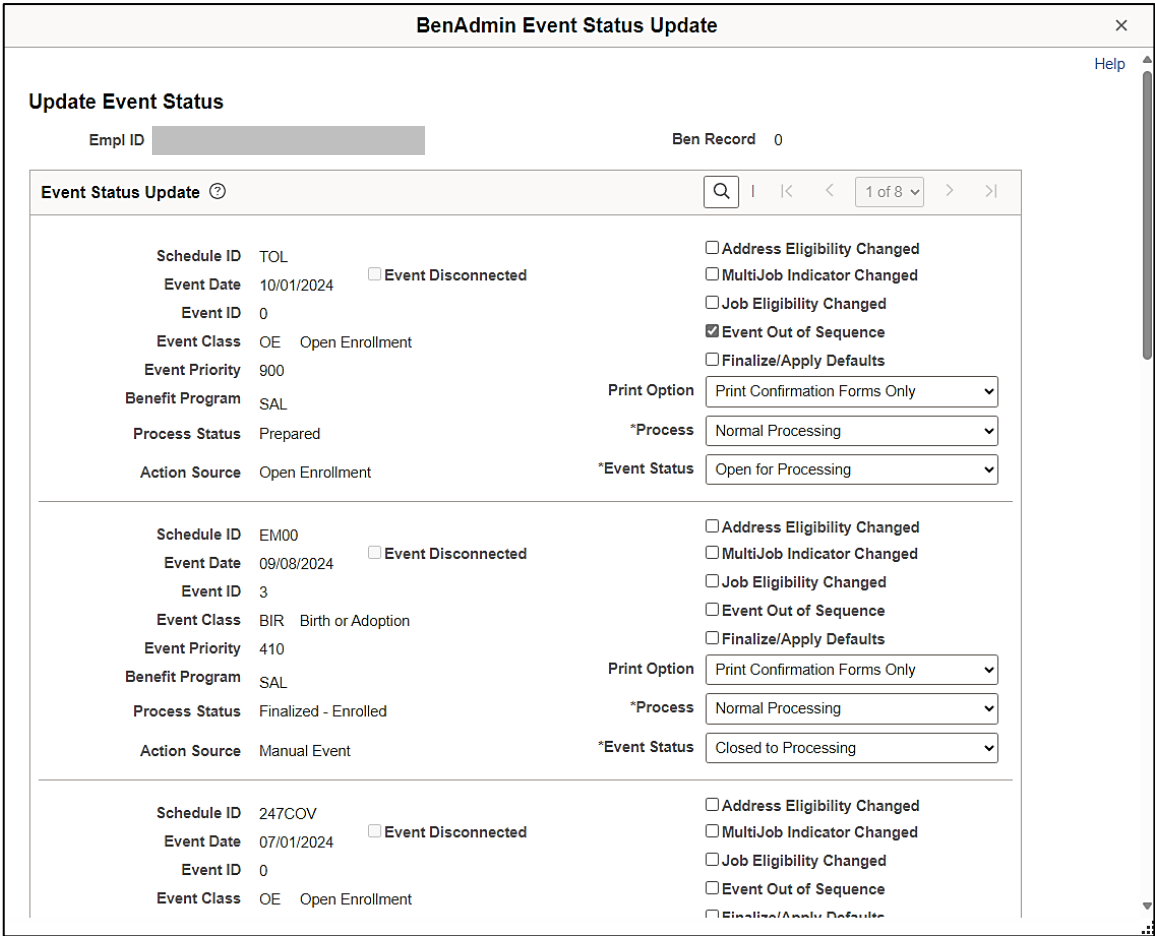


The screenshot shows the 'On-Demand Event Maintenance' page. At the top, there is a navigation bar with a back arrow and 'Cardinal Homepage' on the left, and 'On-Demand Event Maintenance' on the right. Below the navigation bar, the page title 'On-Demand Event Maintenance' is displayed. The main content area includes several sections: a top section with 'Person ID' and 'Ben Record' (0); a section with 'Activity Date', 'Source', 'Empl Record' (0), and 'Pending Activities' (0); a section with 'Event ID' (3), 'Event Date' (09/08/2024), 'Status' (Finalized - Enrolled), 'Class' (BIR), and an 'Event Status Update' button; a section with 'Prepare Options', 'Enrollment Statement', 'Run Date', and 'Frequency' (Deduction Frequency selected); a section with 'Election Entry', 'Entered' (0 of 0), 'Show Plans' button, 'Validate/Finalize', 'Errors' (0), 'Show Errors' button, and 'Finalize/Apply Defaults' checkbox; a section with 'Confirmation Statement', 'Run Date', 'Reprocess' button, 'Process Indicator' (N), and 'Normal Processing' text; and a bottom section with 'Save', 'Return to Search', and 'Notify' buttons.


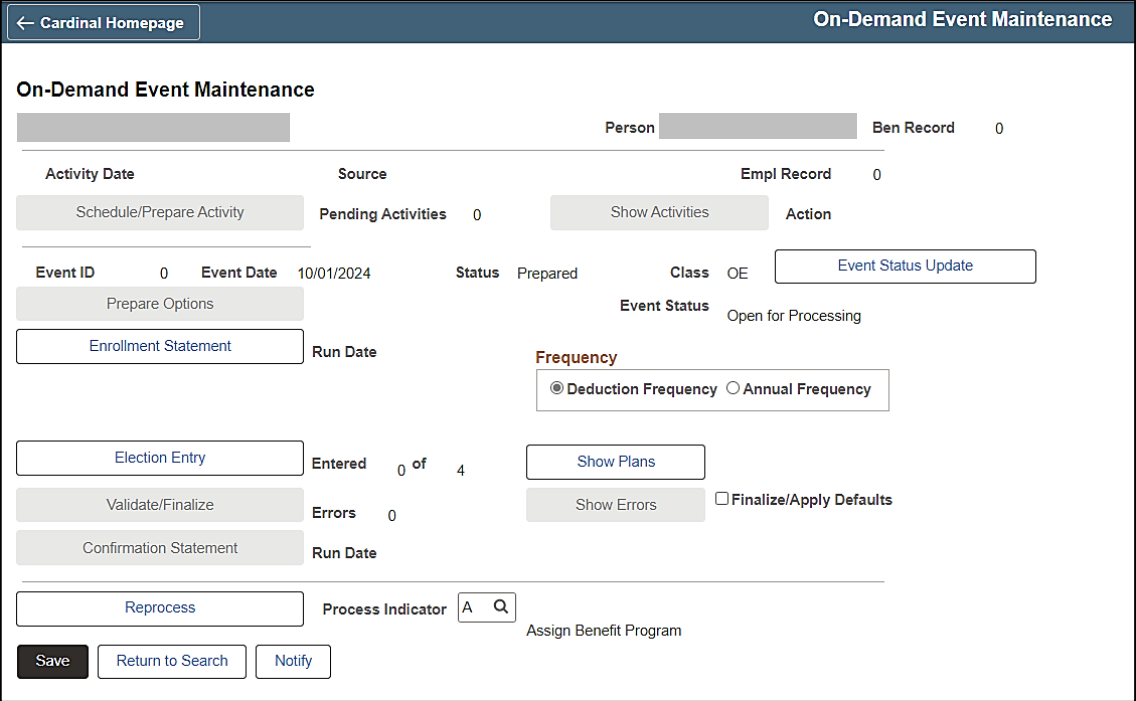




The **Status** field now displays “Finalized – Enrolled” and the **Event Status** field now displays “Closed to Processing”.



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Step	Action
22.	<p>Click the Event Status Update button and review the employee's Benefit Events.</p> 
<p>The BenAdmin Event Status Update page displays in a pop-up window.</p> 	
23.	<p>Locate the Benefit Event for the Open Enrollment and then click the corresponding Process dropdown button and select "Assign Benefit Program".</p> 
24.	<p>Click the OK button at the bottom of the page.</p> 

Step	Action
	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.
<p>The On-Demand Event Maintenance page redisplay.</p> 	
	The Status field still displays “Prepared” and the Event Status field now displays “Open for Processing”.
25.	<p>Click the Election Entry button.</p> 



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Step	Action
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The **BenAdmin Data Entry** page displays in a pop-up window.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Ben Record 0 Event ID 3
Event Data 09/08/2024 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 22 Kaiser HMO (KP) (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		Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

26.

Update the employee's enrollment elections for Open Enrollment (OE) to match the Life Event previously entered.

Plan Type 10 : Medical

Option Code 24 Kaiser HMO (KP) (Family)


Health Provider ID ☐ Previously Seen

Special Requirements

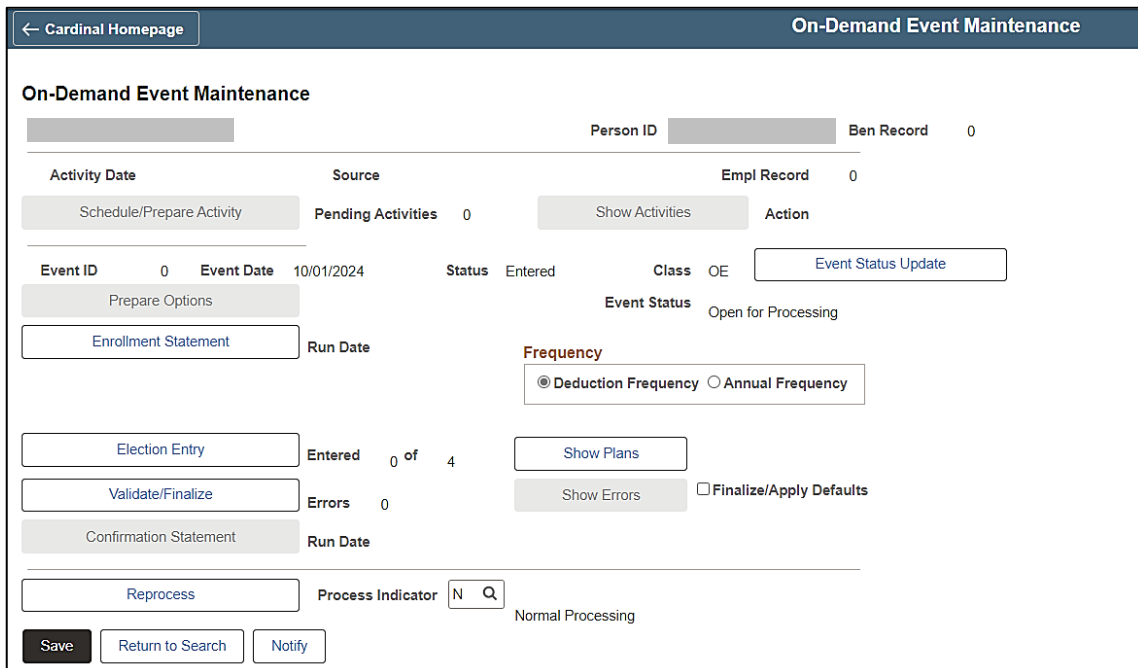
Dependents/Beneficiaries



Enroll All

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

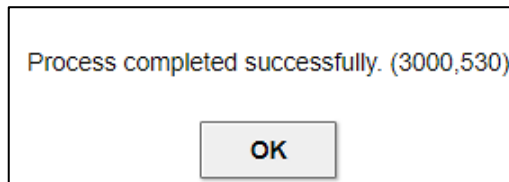
Step	Action
27.	Once all of the applicable elections have been updated, click the OK button at the bottom of the page. 

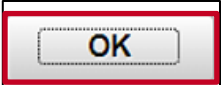
The **On-Demand Event Maintenance** page redisplay.



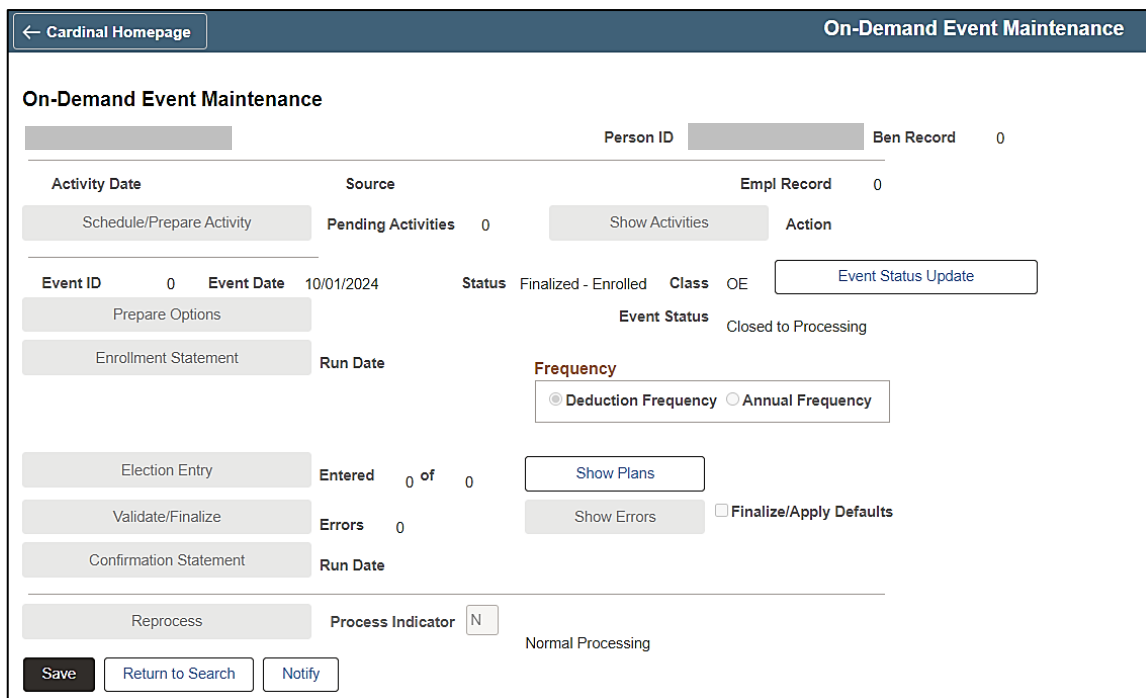
	The Status field now displays “Entered” and the Event Status field still displays “Open for Processing”.
28.	Click the Validate/Finalize button. 

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



Step	Action
29.	Click the OK button. 

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



← Cardinal Homepage **On-Demand Event Maintenance**

On-Demand Event Maintenance

Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 0 Event Date 10/01/2024 Status Finalized - Enrolled Class OE 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

	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. 