



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.

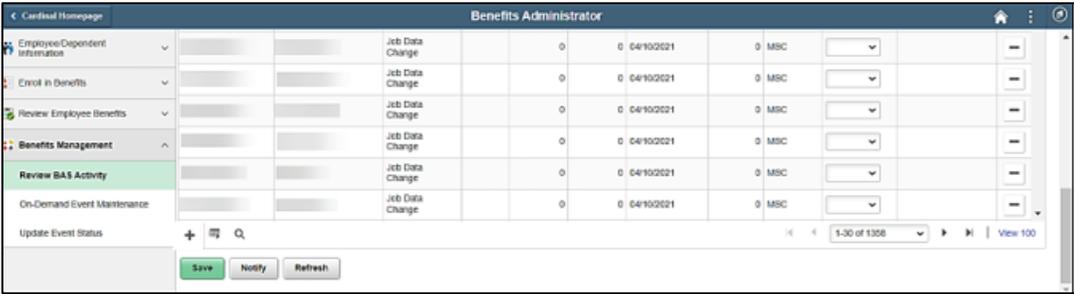
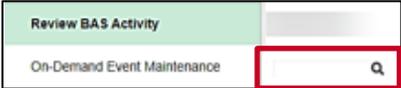
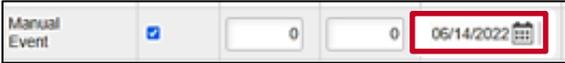
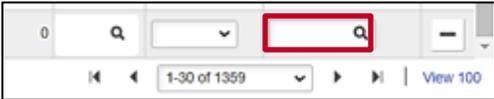
Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

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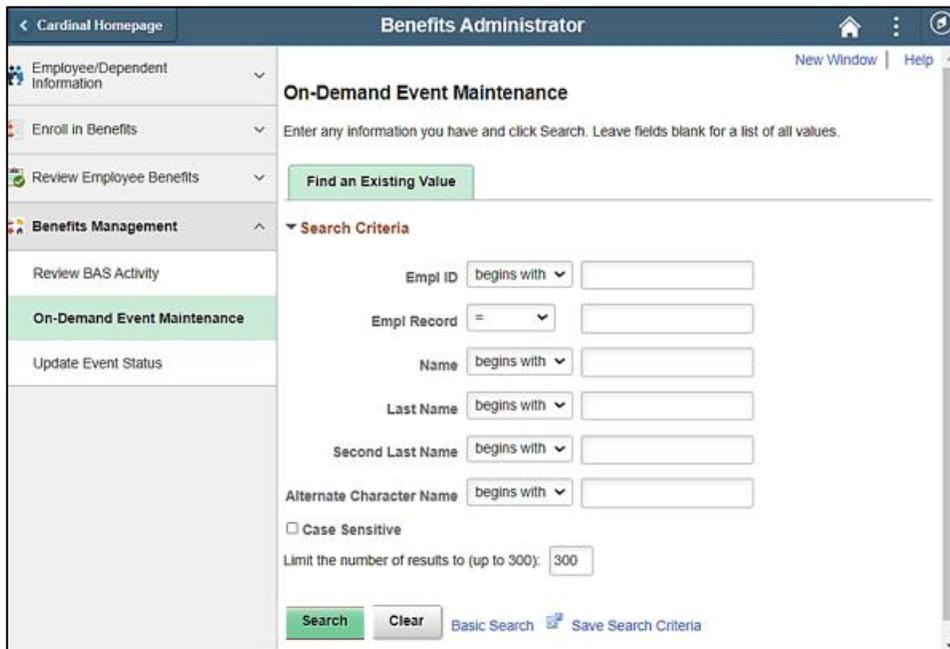
Processing a Life Event during Open Enrollment (OE)

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
	<p>The Review BAS Activity page displays.</p> 
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.



The screenshot shows the 'On-Demand Event Maintenance' search interface. On the left is a navigation menu with 'On-Demand Event Maintenance' selected. The main area contains a search criteria form with the following fields:

- Empl ID: begins with [text box]
- Empl Record: = [dropdown]
- Name: begins with [text box]
- Last Name: begins with [text box]
- Second Last Name: begins with [text box]
- Alternate Character Name: begins with [text box]

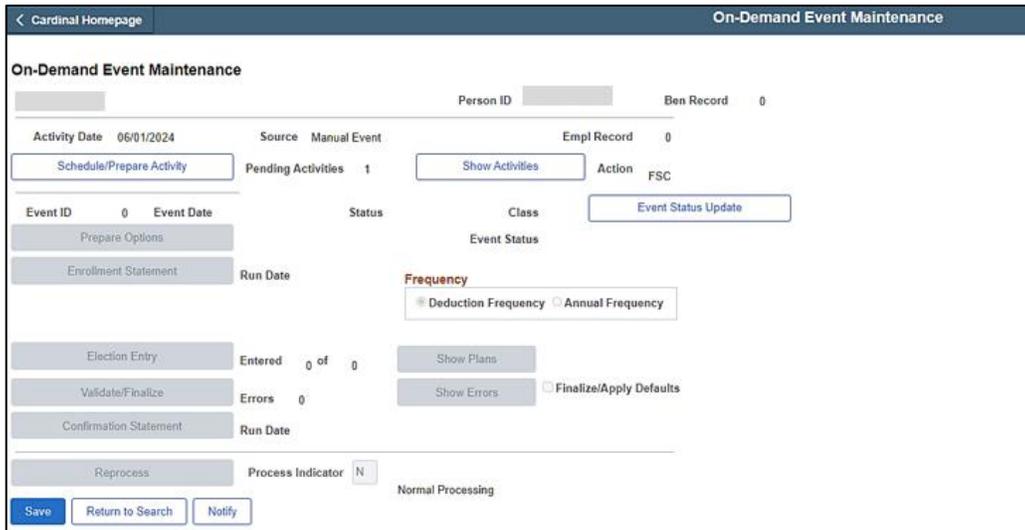
Additional options include 'Case Sensitive' (unchecked) and 'Limit the number of results to (up to 300): 300'. A green 'Search' button is visible at the bottom left of the search criteria section.

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. <div data-bbox="300 1402 998 1480" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Empl ID begins with [dropdown] [text box] </div>
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9.	Click the Search button. <div data-bbox="292 1570 836 1648" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Search Clear Basic Search Save Search Criteria </div>
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Step	Action
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The **On-Demand Event Maintenance** page displays.



10.	Click the Schedule/Prepare Activity button. <div style="border: 1px solid red; padding: 5px; margin: 10px auto; width: fit-content;"> Schedule/Prepare Activity </div>
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	If the Schedule/Prepare Activity button is disabled, the Ben Admin process has already prepared the Benefit Event. Proceed to the next step.
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Once the process completes, a **Message** displays in a pop-up window.

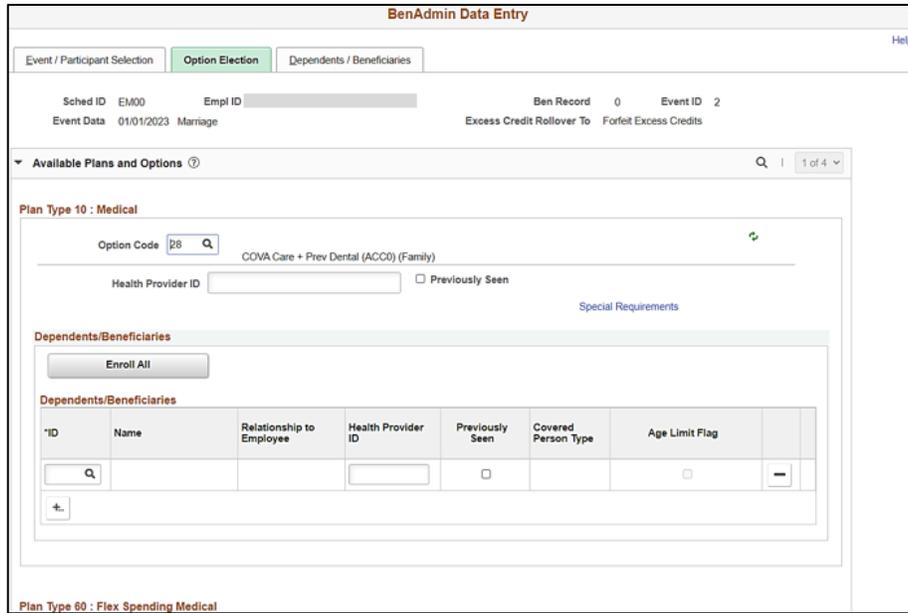


11.	Click the OK button. <div style="border: 1px solid red; padding: 5px; margin: 10px auto; width: fit-content;"> OK </div>
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	The Status field now displays “Prepared” and the Event Status field now displays “Open for Processing”. <div style="border: 1px solid black; padding: 5px; margin: 10px auto; width: fit-content;"> Status Prepared Class DIV Event Status Update Event Status Open for Processing </div>
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Step	Action
12.	Click the Election Entry button. 

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

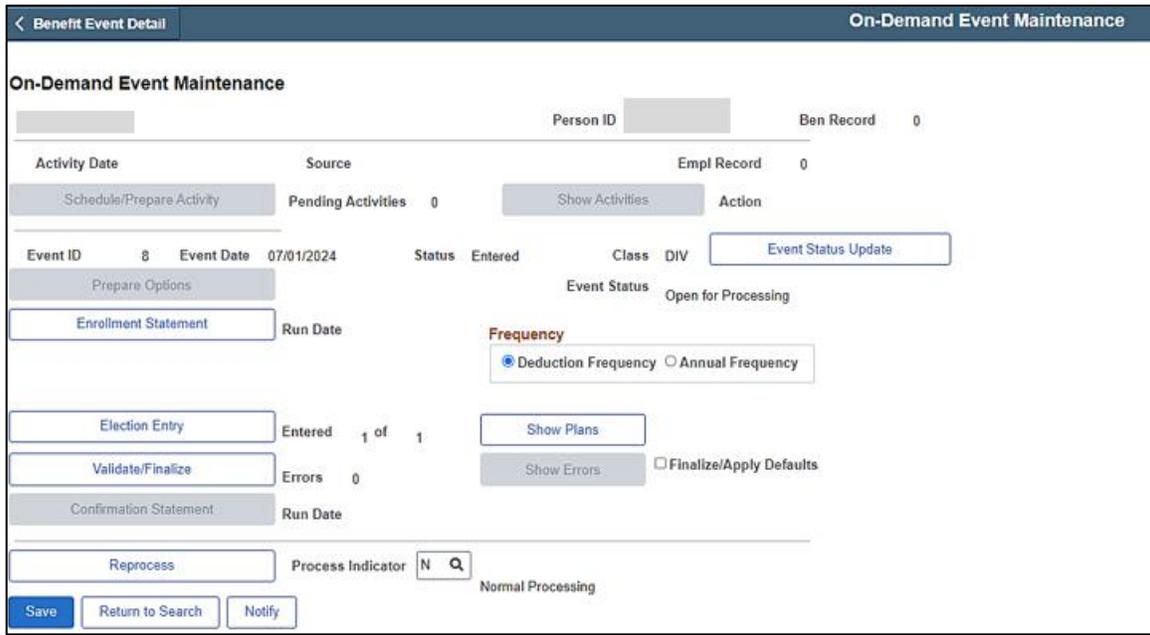


13.	Update the employee's benefit elections as needed. 
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14.	Once all of the applicable elections have been updated, click the OK button at the bottom of the page. 
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Step	Action
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The **On-Demand Event Maintenance** page redisplay



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



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

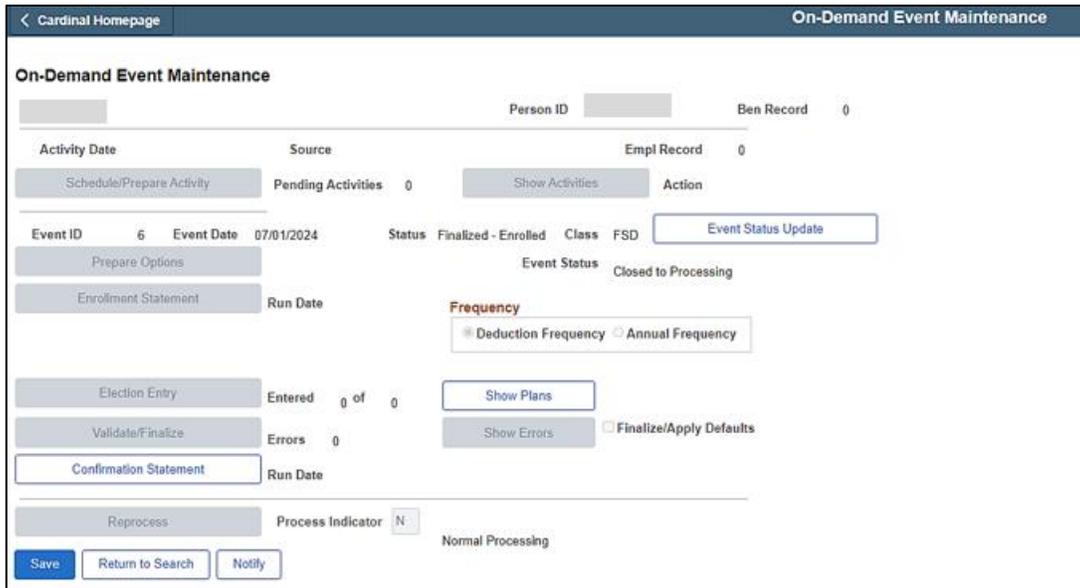


16. Click the **OK** button.



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




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

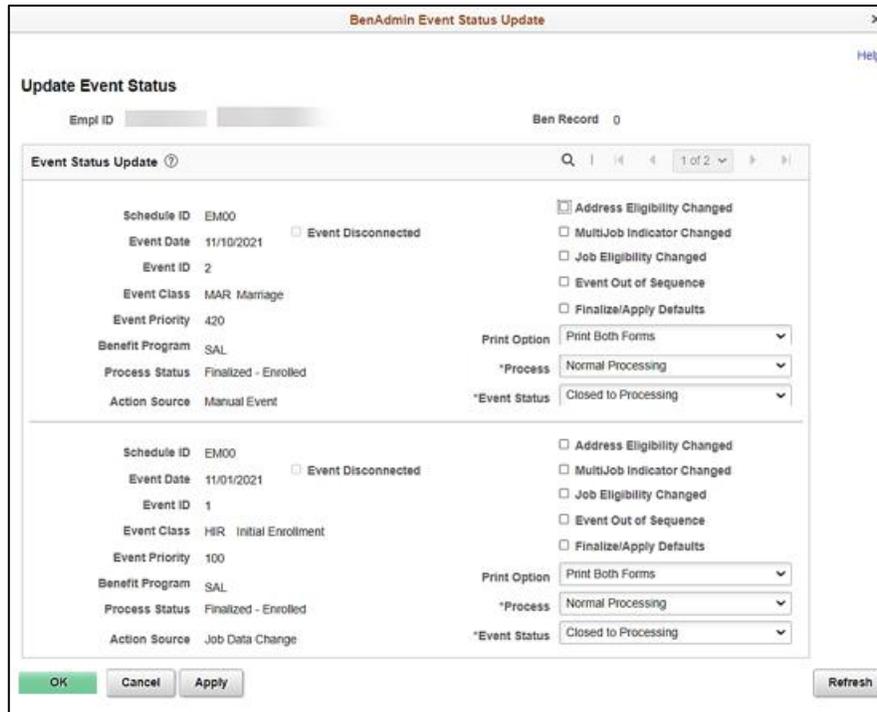
15.

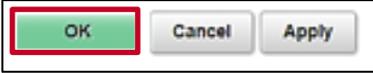
Click the **Event Status Update** button and review the employee’s Benefit Events.



Step	Action
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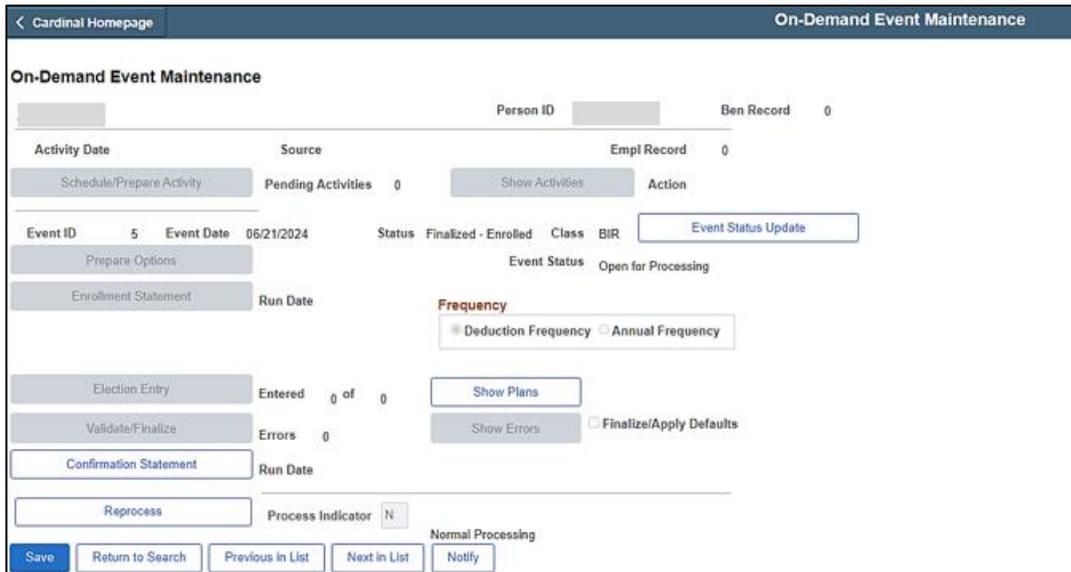
The **BenAdmin Event Status Update** page displays in a pop-up window.



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




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.



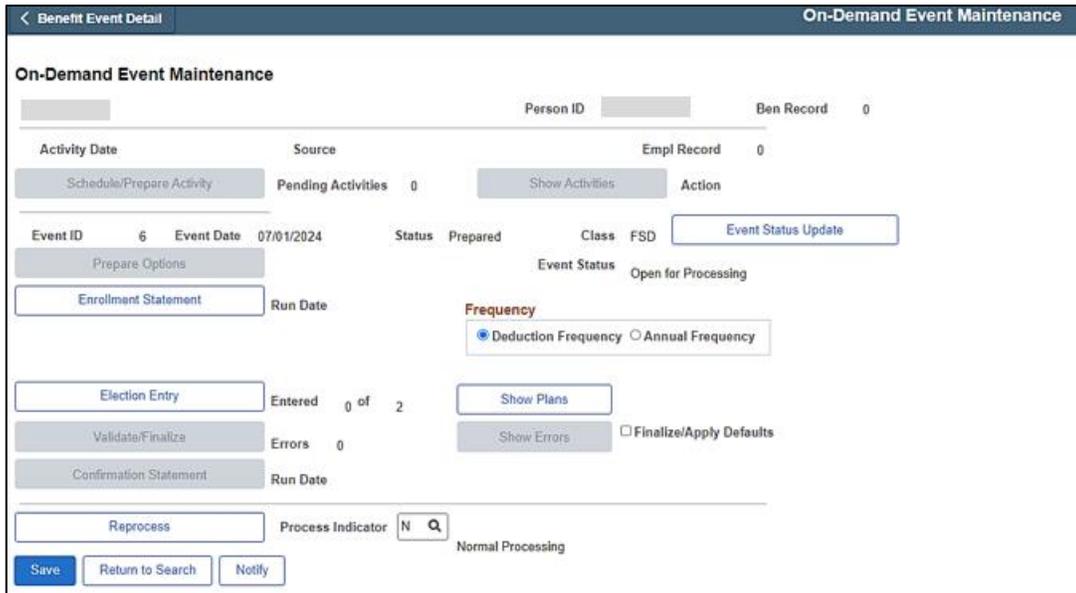
20.

Click the **OK** button.



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



On-Demand Event Maintenance

Person ID [redacted] Ben Record 0

Activity Date [redacted] Source [redacted] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 6 Event Date 07/01/2024 Status Prepared Class FSD Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency
 Deduction Frequency Annual Frequency

Election Entry Entered 0 of 2 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



The **Status** field now displays “Prepared” and the **Event Status** field still displays “Open for Processing”.

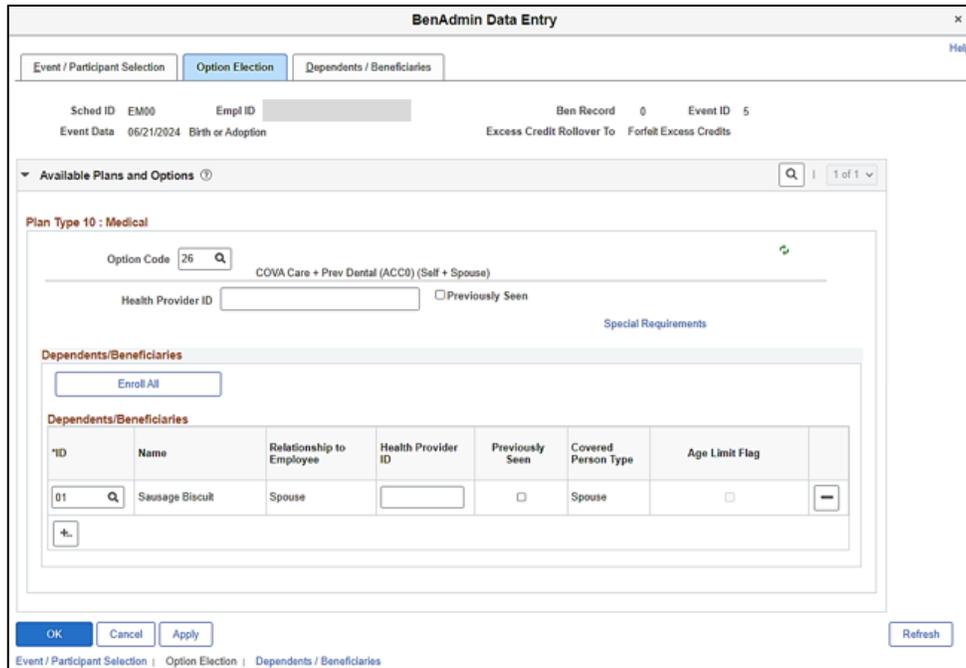
21.

Click the **Election Entry** button.

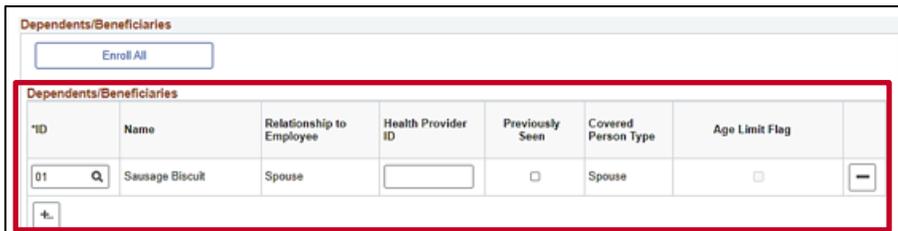


Step	Action
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The **BenAdmin Data Entry** page displays in a pop-up window.



22. Update the employee's enrollment elections for Open Enrollment (OE).



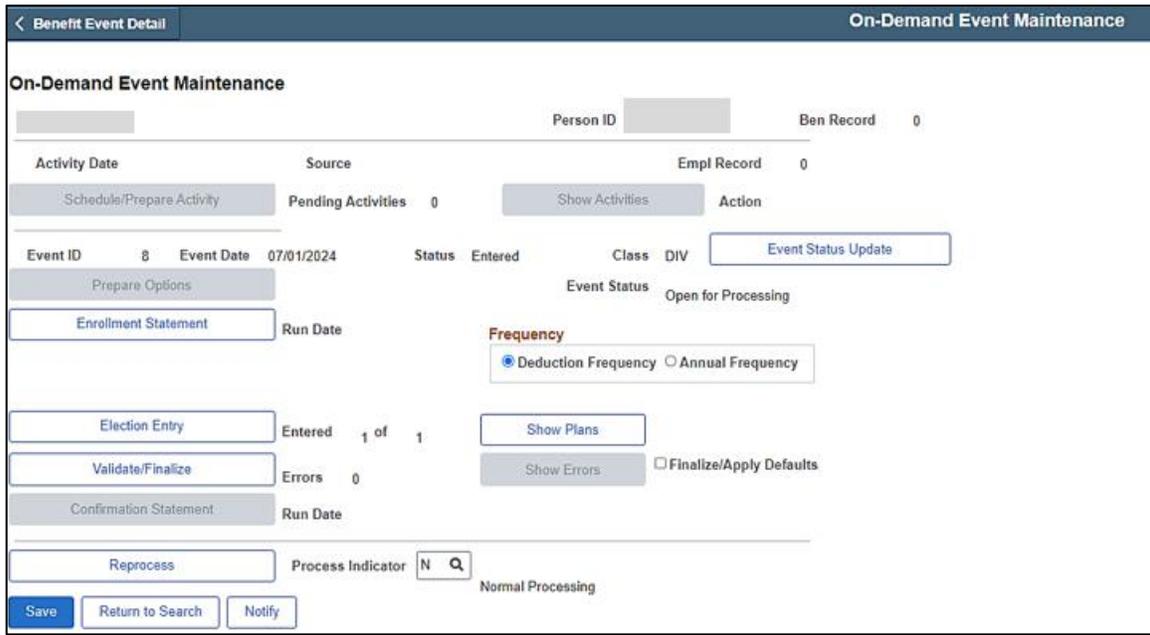
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Sausage Biscuit	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>

23. Click the **OK** button at the bottom of the page after all elections have been updated.



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



The screenshot shows the 'On-Demand Event Maintenance' interface. Key elements include:

- Person ID** and **Ben Record** fields.
- Activity Date** and **Source** fields.
- Empl Record** field.
- Status** field displaying 'Entered'.
- Event Status** field displaying 'Open for Processing'.
- Event ID** and **Event Date** (07/01/2024).
- Frequency** options: Deduction Frequency, Annual Frequency.
- Errors** field displaying '0'.
- Process Indicator** field displaying 'N'.
- Buttons: **Event Status Update**, **Validate/Finalize**, **Reprocess**, **Save**, **Return to Search**, **Notify**.



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.



The message box contains the text: "Process completed successfully. (3000,530)" and an **OK** button.

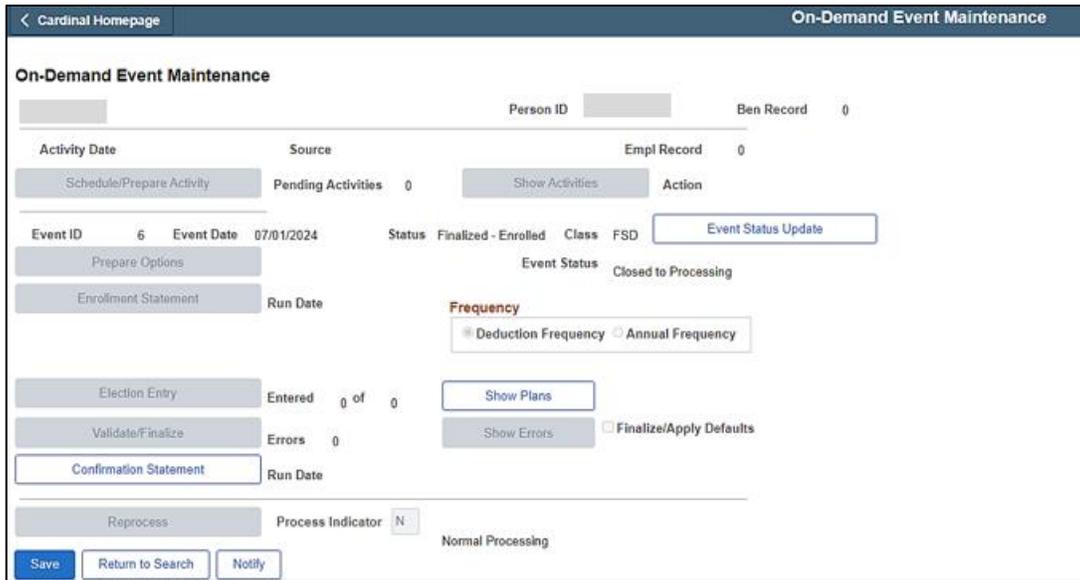
25.

Click the **OK** button.



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




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.

