
BN361_Creating and Completing a Life Event on behalf of an Employee**Creating and Completing a Life Event on behalf of an Employee Overview**

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to create and complete a manual Benefit Event (Life Event) on behalf of the employee.

This process is utilized when the employee does not initiate the qualifying Life Event through Employee Self-Service (ESS). For cases where the employee did initiate the qualifying Life Event, refer to the Job Aid titled **BN361_Completing an Employee Initiated Life Event**. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

This Job Aid also contains sections that provide the step-by-step instructions utilized by an Agency BA to complete the following after the new hire Benefit Event is completed and finalized:

- Viewing the employee's benefits information to validate accuracy
- Viewing/printing the Confirmation Statement for the employee

Navigation Note: Please note that you may see 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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BN361_Creating and Completing a Life Event on behalf of an Employee**Creating and Processing a Life Event on behalf of an Employee (Adding Dependent(s))**

This section of the Job Aid should be referenced when you are creating and processing a Life Event on on behalf of the employee wherein one or more dependents is being added to the employee's coverage (marriage, birth, adoption, etc.). The steps included in this section of the Job Aid are based on the following example scenario:

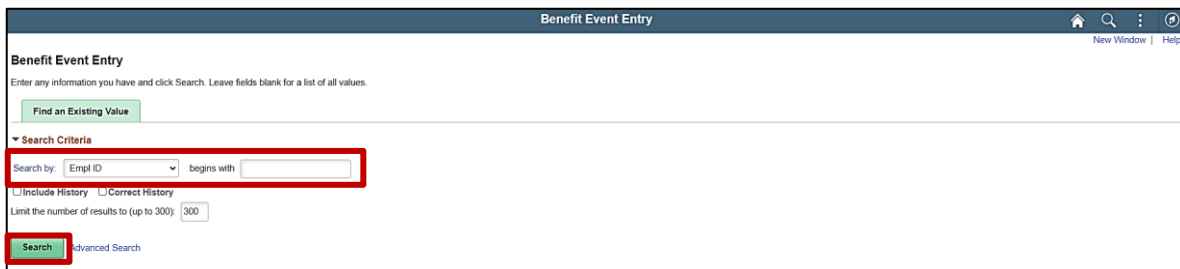
Scenario: An employee got married on 12/16/2022. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 12/19/2022 to add their spouse as a dependent and enroll them in their benefits. Additionally, a stepchild will be added and enrolled in the employee's benefits. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being added to the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

1. First, the Benefit Event must be created. Access the **Benefit Event** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Search** page displays.



2. Enter the employee's Employee ID in the **Search by** field.

Note: The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.

3. Click the **Search** button.



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

The screenshot shows the 'Benefit Event' page for employee Thomas Jones32. The 'Life Event' dropdown menu is highlighted with a red box. Below it, the 'Life Event Date' and 'Paperwork Receipt Date' fields are visible. The 'Health Change' and 'FSA Change' sections are also present, each with a 'Change' dropdown and a 'Special Processing Message' text area. The 'Save' and 'Return to Search' buttons are at the bottom.

- Click the **Life Event** dropdown button and select the applicable life event ("Marriage" in this scenario).

The **Benefit Event** page redisplay with the selected Life Event.

The screenshot shows the 'Benefit Event' page for employee Thomas Jones32. The 'Life Event' dropdown is now set to 'Marriage'. The 'Life Event Date' and 'Paperwork Receipt Date' fields are highlighted with a red box. The 'Health Change' and 'FSA Change' sections are also present, each with a 'Change' dropdown and a 'Special Processing Message' text area. The 'Save' and 'Return to Search' buttons are at the bottom.

- Click the **Life Event Date Calendar** icon and select the applicable date ("12/16/2022" in this scenario).

Note: This is the date of the actual event (marriage, birth, divorce, etc.).

- Click the **Paperwork Receipt Date Calendar** icon and select the applicable date ("12/19/2022" in this scenario).

Note: This is the date that the Benefits Enrollment form was received from the employee.



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Cardinal Homepage Benefit Event

Thomas Jones32 Employee ID [redacted] Benefit Record Number 0

Life Event: Marriage

Life Event Date: 12/19/2022 Paperwork Receipt Date: 12/19/2022

Health Change

Health Change Needed: No

Current Cov. Level: Single Future Cov. Level: Family

Change: Existing Health Plan - Adding Spouse/Children

FSA Change

FSA Change Needed: No

Change: Existing Health Plan - Adding Spouse/Children

Special Processing Message (Health)

Special Processing Message (FSA)

Save Return to Search

- Click the **Health Change Needed** dropdown button and select “Yes”.

Note: 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.

The page refreshes.

Cardinal Homepage Benefit Event

Thomas Jones32 Employee ID [redacted] Benefit Record Number 0

Life Event: Marriage

Life Event Date: 12/19/2022 Paperwork Receipt Date: 12/19/2022

Health Change

Health Change Needed: Yes

Current Cov. Level: Single Future Cov. Level: Family

Change: Existing Health Plan - Adding Spouse/Children

FSA Change

FSA Change Needed: No

Change: Existing Health Plan - Adding Spouse/Children

Special Processing Message (Health)

Special Processing Message (FSA)

Save Return to Search

Note: The **Current Cov. Level** field auto-populates with the employee’s current Health Plan enrollment coverage level.

- Click the **Future Cov. Level** dropdown button and select the applicable coverage level.

Note: 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.

- Click the **Change** dropdown button and select “Existing Health Plan – Adding Spouse/Children”.

Note: The selections available will vary based on the type of Life Event previously selected.



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The screenshot shows the 'Benefit Event' form for Thomas Jones32. The 'Life Event' is set to 'Marriage' with a date of 12/19/2022. The 'Health Change' section is expanded, showing 'Health Change Needed' as 'Yes', 'Current Cov. Level' as 'Single', and 'Future Cov. Level' as 'Employee + Spouse'. The 'FSA Change' section is highlighted with a red box, showing 'FSA Change Needed' as a dropdown menu and 'Change' as a text input field. Below these sections are two text input fields for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. At the bottom are 'Save' and 'Return to Search' buttons.

10. 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).

The screenshot shows the 'Benefit Event' form for Thomas Jones32. The 'Life Event' is set to 'Marriage' with a date of 12/19/2022. The 'Health Change' section is expanded, showing 'Health Change Needed' as 'Yes', 'Current Cov. Level' as 'Single', and 'Future Cov. Level' as 'Employee + Spouse'. The 'FSA Change' section is also expanded, showing 'FSA Change Needed' as a dropdown menu and 'Change' as a text input field. Below these sections are two text input fields for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)', which are highlighted with a red box. At the bottom are 'Save' and 'Return to Search' buttons.

11. Click the **Save** button.
12. After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions.

Note: 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.



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13. The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

The **On-Demand Event Maintenance Search** page displays.

14. Enter the employee's Employee ID in the **Empl ID** field.

Note: 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.

15. Click the **Search** button.

The **On-Demand Event Maintenance** page displays for the applicable employee.



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16. Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a marriage, so the **Activity Date** field defaults to the first day of the month following the date of marriage). Ensure that this date is accurate.

Note: The **Source** field will be "Manual Event". The **Action** field will default based on the type of Life Event ("MAR" for Marriage in this scenario).

17. Click the **Show Activities** button.

The **BAS Activity** page displays in a pop-up window.

Thomas Jones32 Person ID [] Ben Record 0

BAS Activity

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
<input checked="" type="checkbox"/>	0	Manual Event	01/01/2023	0	MAR		+	-

OK Cancel

18. Ensure that the **Select** checkbox option for the Manual Event is selected and then click the **OK** button.

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

On-Demand Event Maintenance

Thomas Jones32 Person ID [] Ben Record 0

Activity Date 01/01/2023 Source Manual Event Empl Record 0

Schedule/Prepare Activity Pending Activities 1 Show Activities Action MAR

Event ID 0 Event Date Status Class Event Status

Prepare Options

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

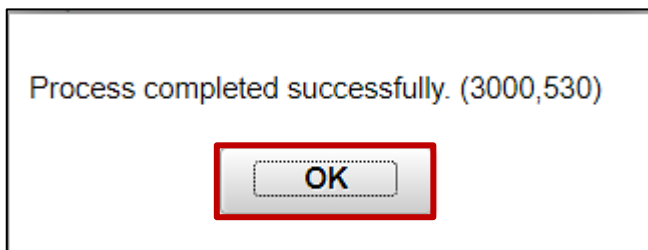
Save Return to Search Notify

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19. If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a “0”. In this case, proceed to Step 21. If the **Pending Activities** field displays a “1”, click the **Schedule/Prepare Activity** button.

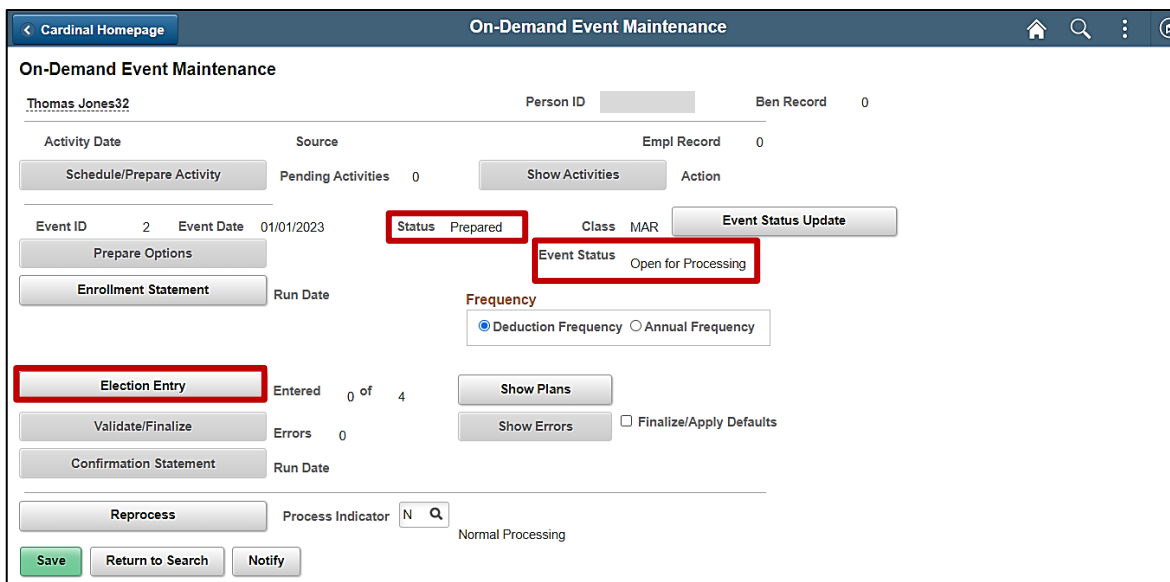
Note: Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

A **Confirmation** message displays in a pop-up window once the automated program completes.



20. Click the **OK** button.

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



The screenshot shows the 'On-Demand Event Maintenance' page for Thomas Jones32. The page includes fields for Person ID, Ben Record, Activity Date, Source, and Empl Record. The 'Status' field is highlighted in red and displays 'Prepared'. The 'Event Status' field is also highlighted in red and displays 'Open for Processing'. The 'Election Entry' button is highlighted in red. Other buttons include 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Run Date', 'Frequency' (with radio buttons for Deduction and Annual), 'Show Plans', 'Show Errors', 'Finalize/Apply Defaults', 'Reprocess', 'Process Indicator', 'Save', 'Return to Search', and 'Notify'.

21. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

Note: If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.

22. Click the **Election Entry** button.



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The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

BenAdmin Data Entry

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

Sched ID: EM00 Empl ID: Thomas Jones32 Ben Record: 0 Event ID: 2
Event Data: 01/01/2023 Marriage Excess Credit Rollover To: Forfeit Excess Credits

Available Plans and Options 1 of 4

Plan Type 10 : Medical

Option Code: 25

COVA Care + Prev Dental (ACC0) (Single)

Health Provider ID: ☐ Previously Seen [Special Requirements](#)

Dependents/Beneficiaries

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

23. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and select the applicable Option Code based on the coverage being elected.

Note: Select the same Benefit Plan that the employee is currently enrolled in but with the new Coverage Code (based on the employee's Benefits Enrollment form) by clicking the corresponding link in the **Option Code** column (Benefit Plan "ACC0" with Coverage Code "4" will be selected in this example as this is a marriage and the employee is adding the spouse and a stepchild).



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The **Option Election** tab redisplay.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The 'Dependents / Beneficiaries' sub-tab is highlighted with a red box. The interface displays employee information (Sched ID: EM00, Empl ID: Thomas Jones32, Ben Record: 0, Event ID: 2, Event Data: 01/01/2023 Marriage). Below this, the 'Available Plans and Options' section shows 'Plan Type 10 : Medical' with an 'Option Code' of 26 and a description 'COVA Care + Prev Dental (ACC0) (Self + Spouse)'. A 'Health Provider ID' field and a 'Previously Seen' checkbox are also present. The 'Dependents/Beneficiaries' section includes an 'Enroll All' button and a table with columns: ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag.

24. Next, add the new dependent(s). Click the **Dependents / Beneficiaries** tab.

The **Dependent / Beneficiaries** tab displays.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The interface displays the same employee information as the previous screenshot. Below this, the 'Dependent/Beneficiaries Currently on Record' section shows a table with columns: Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. The 'Change/Add Dependent Data' link is highlighted with a red box. The 'Elections Requiring Supplemental Information' section shows a table with columns: Election Code, Plan Type, and a link to 'Enroll Dependents'. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

25. Click the **Change/Add Dependent Data** link.



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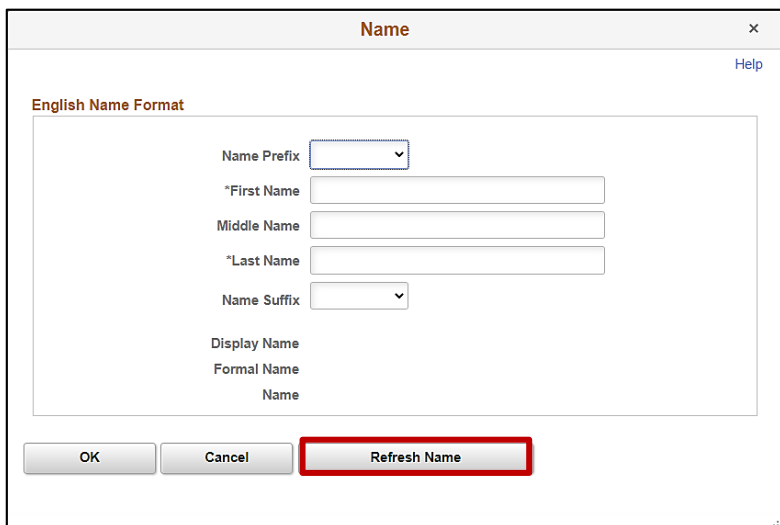
The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.

Note: For Life Events, the **Effective Date** field defaults to the date that the coverage will begin (in this scenario, the Life Event is a marriage, so the **Effective Date** field defaults to the first day of the month following the date of marriage). Do not change this date as it must match the Event Date or the system will not recognize this dependent as eligible for coverage. The **Dependent/Beneficiary ID** field will default to the next available Dependent/Beneficiary ID number ("01" in this scenario) and increment by 1 for each additional dependent subsequently added.

26. Click the **Edit Name** button.

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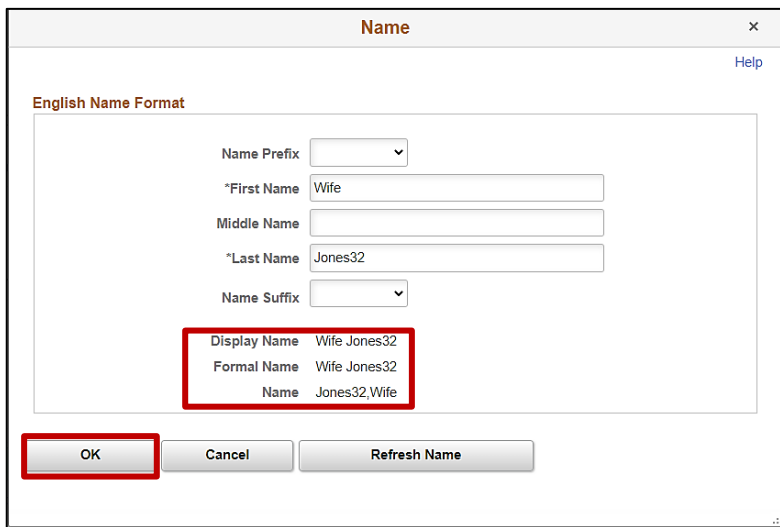
The **Name** page displays in a pop-up window.



27. At a minimum, enter the dependent's first and last name in the corresponding fields. The **Name Prefix**, **Middle Name**, and **Name Suffix** fields are optional but should be entered as applicable.

28. Click the **Refresh Name** button.

The **Name** page refreshes.



Note: The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.

29. Click the **OK** button.



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The **Name** tab redisplay.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The 'Address' tab is highlighted with a red box. The 'Display Name' field is populated with 'Wife Jones32' and is also highlighted with a red box. The 'Effective Date' is 01/01/2023 and the 'Format Type' is English. The 'Edit Name' button is visible.

Note: The **Display Name** field auto-populates with the name information previously entered.

30. Click the **Address** tab.



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The **Address** tab displays.

Dependent/Beneficiary

Name Address Personal Profile

Dependent/Beneficiaries

Thomas Jones32 Person ID

Dependent/Beneficiary ID 01 Name Wife Jones32

Address History

*Effective Date 01/01/2023

☐ Same Address as Employee Address Type

Address

Country USA United States

Address

Edit Address

Phone Information

Same As Employee	Phone Type	Telephone	Extension	Preferred
<input type="checkbox"/>				<input type="checkbox"/>

31. Complete the address information as applicable for the dependent by either:
- Clicking the **Same Address as Employee** checkbox option (applicable for this example) or
 - Selecting the applicable **Address Type** using the dropdown button provided and then clicking the **Edit Address** button (the **Edit Address** page will display in a pop-up window and the applicable address information can be entered)



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The **Address** tab refreshes.

Dependent/Beneficiary

Name Address **Personal Profile**

Dependent/Beneficiaries

Thomas Jones32 Person ID

Dependent/Beneficiary ID 01 Name Wife Jones32

Address History

*Effective Date 01/01/2023

☒ Same Address as Employee Address Type Home

Employee's Current Address

Country USA United States
Address 100 East Main Street
Richmond, VA 23219

Phone Information

Same As Employee	Phone Type	Telephone	Extension	Preferred
<input type="checkbox"/>				<input type="checkbox"/>

Note: The address information auto-populates in the **Employee's Current Address** section.

32. Click the **Personal Profile** tab.



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The **Personal Profile** tab displays.

The screenshot shows the 'Dependent/Beneficiary' form in the Cardinal system. The 'Personal Profile' tab is active. The form displays the following information:

- Dependent/Beneficiary ID:** 01
- Wife Jones32**
- *Date of Birth:** [Calendar icon] (highlighted with a red box)
- Birth Location:** [Text field]
- Birth State:** [Text field]
- Date of Death:** [Calendar icon]
- Medicare Entitled Date:** [Calendar icon]
- Riders/Orders:** [Link]
- Personal History:** [Section header]
- *Effective Date:** 01/01/2023 [Calendar icon]
- *Relationship to Employee:** [Dropdown menu]
- *Dependent Beneficiary Type:** [Dropdown menu]
- *Gender:** Unknown [Dropdown menu]
- *Marital Status:** Single [Dropdown menu]
- Student:** [Checkbox]
- Disabled:** [Checkbox]
- Smoker:** [Checkbox]
- As of:** [Text field]
- Occupation:** [Text field]

Note: The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor).

33. Click the **Date of Birth Calendar** icon and select the dependent's date of birth.
34. Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee ("Spouse" in this example).
35. Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent".
Note: "Approved Dependent" is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.
36. Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Female" in this example).



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37. The **Marital Status** field defaults to “Single”. Updated as needed for the dependent (“Married” in this example).

Note: If any status other than “Single” is selected, select the applicable date using the **Marital Status As of Calendar** icon (“12/16/2022” in this example).

The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are tabs for "Name", "Address", and "Personal Profile", with "Personal Profile" being the active tab. Below the tabs, the name "Thomas Jones32" is displayed next to a "Person ID" field. The "Personal Profile" section contains fields for "Dependent/Beneficiary ID" (01), "Wife Jones32", "Date of Birth" (05/05/1997), "Birth Country", "Date of Death", "Medicare Entitled Date", "Birth Location", "Birth State", and a checkbox for "Riders/Orders exist". Below this is a "Personal History" section with fields for "Effective Date" (01/01/2023), "Relationship to Employee" (Spouse), "Dependent Beneficiary Type" (Approved Dependent), "Gender" (Female), "Marital Status" (Married), and "Occupation". The "Marital Status" field is expanded, showing options for "Student", "Disabled", and "Smoker", each with an "As of" date field. The "As of" date for "Married" is set to 12/16/2022. A vertical scrollbar is visible on the right side of the form.

38. Click the vertical scrollbar to scroll down on the page to the **National ID** section.



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Medicare Entitled Date

Riders/Orders

Personal History

*Effective Date 01/01/2023

*Relationship to Employee Spouse

*Dependent Beneficiary Type Approved Dependent

*Gender Female

*Marital Status Married

As of 12/16/2022

☐ Student

As of

☐ Disabled

As of

☐ Smoker

As of

Occupation

USA

National ID

*Country	*National ID Type	Description	National ID	Primary ID		
USA	PR	Social Security Number		<input checked="" type="checkbox"/>	+	-

OK Cancel Apply

Name | Address | Personal Profile

39. Enter the dependent's Social Security Number (SSN) in the **National ID** field.

Note: If the employee did not provide the dependent's SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the **Base Benefits Consistency Audit** report to monitor dependents with a missing SSN.

40. Click the **OK** button.



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The **Dependents / Beneficiaries** tab redisplay.

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Thomas Jones32

Event ID

2

Event Data

01/01/2023

Marriage

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
Jones32,Wife	Spouse	Approved Dependent	05/05/1997

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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OK

Cancel

Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Note: The dependent just added displays in the **Dependent/Beneficiaries Currently on Record** section. If additional dependents need to be added (i.e; birth of twins, adding stepchildren as a result of marriage, etc.), proceed with Step 41. If no additional dependents need to be added, skip to Step 44.

41. In this scenario, a stepchild will be added. Click the **Change/Add Dependent Data** link.



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The **Name** tab redisplay.

Dependent/Beneficiary

Name | Address | Personal Profile

Thomas Jones32 Person ID []

Dependent/Beneficiaries 1 of 1 View All

*Dependent/Beneficiary ID 01

Name History 1 of 1 View All

*Effective Date 01/01/2023

*Format Type English

Display Name Wife Jones32

Edit Name

OK Cancel Apply

Name | Address | Personal Profile

42. Click the **Add a New Row** icon (+) within the **Dependent/Beneficiaries** section.

The page refreshes with a new row.

Dependent/Beneficiary

Name | Address | Personal Profile

Thomas Jones32 Person ID []

Dependent/Beneficiaries 2 of 2 View All

*Dependent/Beneficiary ID 02

Name History 1 of 1 View All

*Effective Date 01/01/2023

*Format Type English

Display Name

Edit Name

OK Cancel Apply

Name | Address | Personal Profile



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43. The **Dependent/Beneficiary ID** field increments by “1” (“02” in this example as this is the second dependent being added). Dependent/Beneficiary IDs do not need to be sequential and should never be manually updated for existing records. Repeat Steps 26 - 40 to complete the data entry for the next dependent and then repeat Steps 26 – 42 as needed until all dependents have been added.

BenAdmin Data Entry

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

Schedule ID EM00 Employee ID Thomas Jones32
Event ID 2 Event Data 01/01/2023 Marriage
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
Jones32,Wife	Spouse	Approved Dependent	05/05/1997
Thomas54,Stepchild	Stepchild	Approved Dependent	05/22/2015

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Note: All dependents that have been added display in the **Dependent/Beneficiaries Currently on Record** section (spouse and a stepchild in this example).

44. Click the **Option Election** tab.



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The **Option Election** tab redisplay.

BenAdmin Data Entry

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

Sched ID: EM00 | Empl ID: Thomas Jones32 | Ben Record: 0 | Event ID: 2
Event Data: 01/01/2023 Marriage | Excess Credit Rollover To: Forfeit Excess Credits

Available Plans and Options 1 of 4

Plan Type 10 : Medical

Option Code: 28 COVA Care + Prev Dental (ACC0) (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
<input type="text"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>
+...						

Plan Type 60 : Flex Spending Medical

45. Next, enroll the dependent(s) in the previously selected Medical Plan by either:

- Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example) or
- Adding the applicable dependents individually using the **ID Look Up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (+...)



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes.

The screenshot shows the BenAdmin Data Entry interface. The 'Option Election' tab is selected. The 'Event / Participant Selection' tab shows 'Sched ID EM00', 'Empl ID Thomas Jones32', 'Event ID 2', and 'Event Data 01/01/2023 Marriage'. The 'Dependents / Beneficiaries' tab is also visible. The 'Available Plans and Options' section shows 'Plan Type 10 : Medical' with 'Option Code 28' and 'COVA Care + Prev Dental (ACC0) (Family)'. The 'Health Provider ID' field is empty, and the 'Previously Seen' checkbox is unchecked. The 'Special Requirements' link is visible. The 'Dependents/Beneficiaries' section is highlighted with a red box and contains an 'Enroll All' button and a table of dependents.

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Wife Jones32	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Stepchild Thomas54	Stepchild		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

46. The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.
47. Click the vertical scrollbar to scroll down on the page.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The BenAdmin Data Entry window displays three plan types for configuration:

- Plan Type 60 : Flex Spending Medical**
 - Option Code: 1 (Medical Flex Spending Account (FLXMED))
 - Annual Pledge: \$1,000.00
 - Employee Contribution Override: Monthly
 - Buttons: Contribution Worksheet, Special Requirements
- Plan Type 61 : Flex Spending Dependent Care**
 - Option Code: W (Waive Coverage)
 - Annual Pledge: \$0.00
 - Employee Contribution Override: Monthly
 - Buttons: Contribution Worksheet, Special Requirements
- Plan Type AZ : Flex Spending Admin Fee**
 - Option Code: 1 (Flex Spending Admin Fee (FLXFEE))
 - Buttons: Special Requirements

At the bottom, there are buttons for OK, Cancel, Apply, and Refresh. The OK button is highlighted with a red box.

48. Review the employee's FSA elections and make updates as needed based on the information provided by the employee (in this example, the employee is not making any updates to their FSA elections).

49. Once all elections have been made/updated, click the **OK** button.

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

The On-Demand Event Maintenance window displays the following information:

- Person ID:** Thomas Jones32
- Ben Record:** 0
- Activity Date:** 01/01/2023
- Source:** Pending Activities 0
- Empl Record:** 0
- Status:** Entered (highlighted with a red box)
- Class:** MAR
- Event Status:** Open for Processing (highlighted with a red box)
- Frequency:** Deduction Frequency (selected)
- Election Entry:** Entered 1 of 4
- Validate/Finalize:** Errors 0 (highlighted with a red box)
- Confirmation Statement:** Run Date
- Reprocess:** Process Indicator N
- Save:** Return to Search, Notify

Note: The **Status** field will now display as "Entered". The **Event Status** field will still display as "Open for Processing".

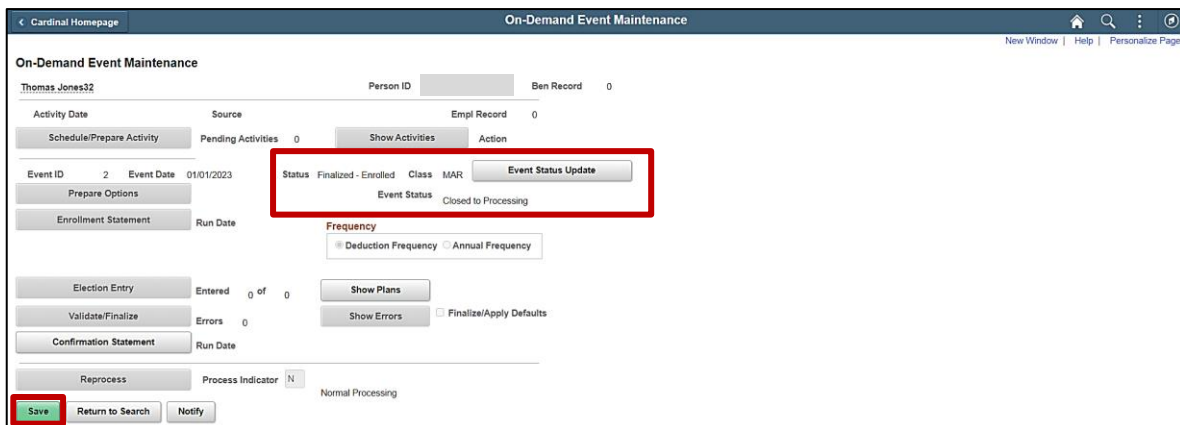
BN361_Creating and Completing a Life Event on behalf of an Employee

50. Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

A **Confirmation** message displays in a pop-up window once the process completes.



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



The screenshot shows the 'On-Demand Event Maintenance' page for Thomas Jones32. The page includes various tabs and buttons. A red box highlights the 'Event Status Update' button, which is located next to the 'Status' field (displaying 'Finalized - Enrolled') and the 'Event Status' field (displaying 'Closed to Processing'). Other visible buttons include 'Schedule/Prepare Activity', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', and 'Notify'. The 'Status' field is now 'Finalized - Enrolled' and the 'Event Status' field is 'Closed to Processing'.

Note: The **Status** field will now display as “Finalized-Enrolled”. The **Event Status** field will still display as “Closed to Processing”.

51. Click the **Save** button.

This process is now complete. Refer to the [Viewing the Employee's Benefit Information](#) section of this Job Aid to validate accuracy. Refer to the [Viewing/Printing a Confirmation Statement](#) if you need to print the Confirmation Statement for the employee.



Creating and Processing a Life Event on behalf of an Employee (Removing Dependent(s))

This section of the Job Aid should be referenced when you are creating and processing a Life Event on behalf of the employee wherein one or more dependents is being removed from the employee's coverage (divorce, death, etc.). The steps included in this section of the Job Aid are based on the following example scenario:

Scenario: An employee got divorced on 6/21/2024. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 6/21/2024 to remove their ex-spouse from enrollment in their Health Plan. The children from the marriage are going to remain enrolled in the employee's Health Plan. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being removed from the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

1. First, the Benefit Event must be created. Access the **Benefit Event** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Search** page displays.

Benefit Event Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Empl ID begins with

Include History Correct History

Limit the number of results to (up to 300): 300

Search Advanced Search

2. Enter the employee's Employee ID in the **Search by** field.

Note: The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.

3. Click the **Search** button.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

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

The screenshot shows the 'Benefit Event' page for an employee named Grey Turtle. The page has a header with 'Cardinal Homepage' and 'Benefit Event'. Below the header, there's a 'Benefit Event Detail' section. The employee's name 'Grey Turtle' is displayed, along with 'Employee ID' and 'Benefit Record Number 0'. The 'Life Event' section is highlighted with a red box, showing a dropdown menu. Below this, there are fields for 'Life Event Date' and 'Paperwork Receipt Date'. The 'Health Change' section includes 'Health Change Needed', 'Current Cov. Level', 'Future Cov. Level', and 'Change' dropdowns. The 'FSA Change' section includes 'FSA Change Needed' and 'Change' dropdowns. There are also text areas for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. At the bottom, there are 'Save' and 'Return to Search' buttons.

- Click the **Life Event** dropdown button and select the applicable type of Life Event by clicking the corresponding list item ("Divorce" in this scenario).

The **Benefit Event** page redisplay with the selected Life Event.

The screenshot shows the 'Benefit Event' page for an employee named Stephon Gillmore. The page has a header with 'Cardinal Homepage' and 'Benefit Event'. Below the header, there's a 'Benefit Event Detail' section. The employee's name 'Stephon Gillmore' is displayed, along with 'Employee ID' and 'Benefit Record Number 0'. The 'Life Event' section shows a dropdown menu set to 'Divorce'. Below this, the 'Life Event Date' and 'Paperwork Receipt Date' fields are highlighted with red boxes. The 'Health Change' section includes 'Health Change Needed', 'Current Cov. Level', 'Future Cov. Level', and 'Change' dropdowns. The 'FSA Change' section includes 'FSA Change Needed' and 'Change' dropdowns. There are also text areas for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. At the bottom, there are 'Save', 'Return to Search', 'Previous in List', and 'Next in List' buttons.

- Click the **Life Event Date Calendar** icon and select the applicable date ("6/21/2024" in this scenario).

Note: This is the date of the actual event (marriage, birth, divorce, etc.).



BN361_Creating and Completing a Life Event on behalf of an Employee

- Click the **Paperwork Receipt Date Calendar** icon and select the applicable date ("6/21/2024" in this scenario).

Note: This is the date that the Benefits Enrollment form was received from the employee.

The screenshot displays the 'Benefit Event' form for an employee named Stephon Gillmore. The form is titled 'Benefit Event' and includes a 'Benefit Event Detail' tab. The employee's ID is [REDACTED] and the Benefit Record Number is 0. The 'Life Event' section shows 'Divorce' selected from a dropdown menu, with a 'Life Event Date' of 06/21/2024 and a 'Paperwork Receipt Date' of 06/21/2024. The 'Health Change' section features a 'Health Change Needed' dropdown menu, which is highlighted with a red box. Below this are fields for 'Current Cov. Level', 'Future Cov. Level', and 'Change'. The 'FSA Change' section includes an 'FSA Change Needed' dropdown and a 'Change' field. At the bottom, there are two text areas for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. Navigation buttons at the bottom include 'Save', 'Return to Search', 'Previous in List', and 'Next in List'.

- Click the **Health Change Needed** dropdown button and select the applicable answer based on the following:
 - If the Life Event does require a change in the Health Plan Coverage Code for the employee, select "Yes" (i.e; this is a divorce event and the employee will still cover two children dependents (no change from "Family" coverage)).
 - Even if the Life Event does not require a change in the Health Plan Coverage Code, but, it will require changes to the covered dependent(s), select "Yes". If "Yes" is not selected, a Benefit Event will not be created.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes.

The screenshot shows the 'Benefit Event Detail' form for an employee named Stephon Gillmore. The form is titled 'Benefit Event' and includes a 'Benefit Event Detail' tab. The employee's ID is [redacted] and the Benefit Record Number is 0. The 'Life Event' section shows 'Divorce' selected, with a date of 06/21/2024. The 'Health Change' section is highlighted with a red box and contains the following fields: 'Health Change Needed' (Yes), 'Current Cov. Level' (Family), 'Future Cov. Level' (dropdown), and 'Change' (dropdown). The 'FSA Change' section includes 'FSA Change Needed' (dropdown) and 'Change' (dropdown). At the bottom, there are fields for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)', and buttons for 'Save', 'Return to Search', 'Previous in List', and 'Next in List'.

Note: The **Current Cov. Level** field auto-populates with the employee's current Health Plan enrollment coverage level.

- Click the **Future Cov. Level** dropdown button and select the applicable coverage level.

Note: 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.

- Click the **Change** dropdown button and select the applicable list item ("Existing health plan – remove spouse/ineligible dependents" in this scenario).

Note: The selections available will vary based on the type of Life Event previously selected.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

Completed **Benefit Event Entry** page:

The screenshot shows the 'Benefit Event' page for employee Stephon Gillmore. The 'Life Event' section is active, with 'Divorce' selected from the dropdown. The 'Life Event Date' is 06/21/2024 and the 'Paperwork Receipt Date' is also 06/21/2024. Under 'Health Change', 'Health Change Needed' is 'Yes', 'Current Cov. Level' is 'Family', 'Future Cov. Level' is 'Family', and 'Change' is 'Existing health plan - remove spouse/inelig'. The 'FSA Change' section is empty. There are text boxes for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. At the bottom, there are buttons: 'Save' (highlighted with a red box), 'Return to Search', 'Previous in List', and 'Next in List'.

10. Click the **Save** button.

The page refreshes once the save is complete.

This screenshot shows the same 'Benefit Event' page after the 'Save' button was clicked. The 'Special Processing Message (Health)' field now contains a confirmation message: 'Use DIV event to remove spouse from health coverage. Required Documentation: Divorce Decree signed by judge. If updating both Health coverage and FSA, please process the DIV event first before updating the FSA event. Required Documentation: Divorce Decree.' This message is highlighted with a red box. The 'Save' button is still highlighted with a red box. All other fields and the overall layout remain the same as in the previous screenshot.



BN361_Creating and Completing a Life Event on behalf of an Employee

11. After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions.

Note: 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.

12. The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

The **On-Demand Event Maintenance Search** page displays.

13. Enter the employee's Employee ID in the **Empl ID** field.

Note: 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.

14. Click the **Search** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **On-Demand Event Maintenance** page displays for the applicable employee.

On-Demand Event Maintenance

Stephen Gillmore

Person ID [redacted] Ben Record 0

Activity Date 07/01/2024 Source Manual Event Empl Record 0

Schedule/Prepare Activity Pending Activities 1 Show Activities Action DIV

Event ID 0 Event Date Status Class Event Status Update

Prepare Options

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

15. Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a divorce, so the **Activity Date** field defaults to the date of divorce). Ensure that this date is accurate.

Note: The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“DIV” for Divorce in this scenario).

16. Click the **Show Activities** button.

The **BAS Activity** page displays in a pop-up window.

BAS Activity

Stephen Gillmore

Person ID [redacted] Ben Record 0

Help

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	07/01/2024	0	DIV	DIV

OK Cancel

17. Ensure that the **Select** checkbox option for the Manual Event is selected and then click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

18. If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a “0”. In this case, proceed to Step 21. If the **Pending Activities** field displays a “1”, click the **Schedule/Prepare Activity** button.

Note: Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

A **Confirmation** message displays in a pop-up window once the automated program completes.

19. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

On-Demand Event Maintenance

Stephon Gillmore Person ID [] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 8 Event Date 07/01/2024 Status Prepared Class DIV Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 1 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

20. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

Note: If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.

21. Click the **Election Entry** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] Stephon Gillmore Ben Record 0 Event ID 8
Event Data 07/01/2024 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ?

Plan Type 10 : Medical

Option Code 40 COVA Cr+Exp Den+Out-of-ntwk (ACC3) (Family)

Health Provider ID ☐ Previously Seen [Special Requirements](#)

Enroll All

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Curtis Gillmore	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
02	MARGARET GILLMORE	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>
03	TYLER GILLMORE	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

OK Cancel Apply

Event / Participant Selection | Option Election | Dependents / Beneficiaries

22. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form as needed by clicking the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and then selecting the applicable Medical Plan/Coverage Code (in this scenario, the employee has three children dependents that are not being removed and therefore, the Medical Plan coverage code does need to be updated).



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Stephon Gillmore Ben Record 0 Event ID 8
Event Data 07/01/2024 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ? 1 of 1

Plan Type 10 : Medical

Option Code 40 COVA Cr+Exp Den+Out-of-ntwk (ACC3) (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	Curtis Gillmore	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
02	MARGARET GILLMORE	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>
03	TYLER GILLMORE	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

[Refresh](#)

OK Cancel Apply

Event / Participant Selection | Option Election | Dependents / Beneficiaries

23. Next, update the applicable dependent being removed from coverage. Click the **Dependents / Beneficiaries** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Dependents / Beneficiaries** tab displays.

The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The window displays employee information for Stephon Gillmore and a table of dependents. A red box highlights the 'Change/Add Dependent Data' link.

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Gillmore, Curtis	Child	Approved Dependent	08/05/2014
GILLMORE, MARGARET J	Spouse	Approved Dependent	08/19/1971
GILLMORE, TYLER D	Child	Approved Dependent	08/08/2004
Gillmore, Happy	Child	Approved Dependent	01/17/2024

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

Event ID	Event Data	Enroll Dependents
10	Medical	Enroll Dependents

Buttons: OK, Cancel, Apply, Refresh

24. Click the **Change/Add Dependent Data** link.

The **Dependent/Beneficiary** page displays with the **Name** tab displayed by default.

The screenshot shows the 'Dependent/Beneficiary' window with the 'Name' tab selected. The window displays the name history for Stephon Gillmore. A red box highlights the 'Personal Profile' tab.

Dependent/Beneficiary

Stephon Gillmore | Person ID [redacted]

Name History

*Effective Date	*Format Type	Display Name
01/01/1901	English	Curtis Gillmore

Buttons: OK, Cancel, Apply, Edit Name

25. Next, locate the dependent being removed. Click the **Personal Profile** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Personal Profile** tab displays.

Dependent/Beneficiary

Name Address **Personal Profile**

Stephon Gillmore Person ID [Redacted]

Personal Profile [Search] [Previous] [Next] 2 of 4 [View All]

Dependent/Beneficiary ID 02 MARGARET GILLMORE

*Date of Birth 08/19/1971 Birth Location [Redacted]
Birth Country [Redacted] Birth [Redacted]
Date of Death [Redacted]
Medicare Entitled Date [Redacted]

Personal History [Search] [Previous] [Next] 1 of 1 [View All]

*Effective Date 01/01/1901
*Relationship to Employee Spouse
*Dependent Beneficiary Type Approved Dependent
*Gender Female
*Marital Status Married
☐ Student
☐ Disabled
☐ Smoker
As of 01/01/1901
As of [Redacted]
As of [Redacted]
As of [Redacted]
Occupation [Redacted]

Do not use this icon to remove the dependent.

Note: When removing dependents from coverage due to a Life Event, do not remove the dependent from Cardinal entirely as this will remove important audit history information from the system. The **Delete** icon (-) highlighted above would delete the dependent from Cardinal. Do not use this icon. Complete the following steps to correctly remove the no longer eligible dependent from coverage.

26. Click the **Add a Row** icon (+) within the **Personal History** section.



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes with a new row.

The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are tabs for "Name", "Address", and "Personal Profile". Below the tabs, the name "Stephon Gillmore" and "Person ID" are displayed. The "Personal Profile" section contains fields for "Date of Birth" (08/19/1971), "Birth Country", "Date of Death", "Medicare Entitled Date", "Birth Location", and "Birth State". Below this is a "Personal History" section with a table of records. The first record is highlighted with a red box and contains the following information:

*Effective Date	*Relationship to Employee	*Dependent Beneficiary Type	*Gender	*Marital Status	Occupation
07/01/2024	Spouse	Approved Dependent	Female	Married	

Note: The **Effective Date** field defaults to the date on which coverage for the dependent will be stopped based on the Life Event being processed (first day of the following month in this scenario due to a Divorce event being processed).

27. Click the **Relationship to Employee dropdown** button and select the applicable list item ("ExSpouse" in this scenario).



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes based on the relationship to employee selection.

The screenshot shows a web application window titled "Dependent/Beneficiary". It has tabs for "Name", "Address", and "Personal Profile". The "Personal Profile" tab is active, showing details for "Stephon Gillmore" with a "Person ID" field. Below this is a "Personal Profile" section with fields for "Dependent/Beneficiary ID" (02), "MARGARET GILLMORE", "Date of Birth" (08/19/1971), "Birth Country", "Date of Death", "Medicare Entitled Date", "Birth Location", "Birth State", and "Riders/Orders exist". A "Personal History" section is also visible, showing "Effective Date" (07/01/2024), "Relationship to Employee" (ExSpouse), "Dependent Beneficiary Type" (Unapproved Dependent), "Gender" (Female), "Marital Status" (Married), and "Occupation". The "Dependent Beneficiary Type" and "Marital Status" fields are highlighted with red boxes.

Note: The **Dependent Beneficiary Type** field updates to “Unapproved Dependent” based on the relationship to employee selection.

28. Click the **Marital Status dropdown** button and select the applicable list item (“Divorced” in this scenario).
29. Scroll down to the bottom of the page as needed and click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **BenAdmin Data Entry** page redispays.

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Stephon Gillmore

Event ID

8

Event Data

07/01/2024

Divorce

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
Gillmore,Curtis	Child	Approved Dependent	08/05/2014
GILLMORE,MARGARET J	ExSpouse	Unapproved Dependent	08/19/1971
GILLMORE,TYLER D	Child	Approved Dependent	08/08/2004
Gillmore,Happy	Child	Approved Dependent	01/17/2024

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-------------------

OK

Cancel

Apply

Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Note: The applicable dependent is updated to an unapproved dependent in the **Dependent/Beneficiaries Currently on Record** table.

30. Next, update the enrolled dependents. Click the **Option Election** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Option Election** tab redisplay.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Stephon Gillmore Ben Record 0 Event ID 8
Event Data 07/01/2024 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ?

Plan Type 10 : Medical

Option Code 40

COVA Cr+Exp Den+Out-of-ntwk (ACC3) (Family)

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	
01	Curtis Gillmore	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	—
02	MARGARET GILLMORE	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	—
03	TYLER GILLMORE	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	—

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

31. Click the **Enroll All** button.

A message displays in a pop-up window indicating that all dependents will be removed in order to re-enroll the eligible dependents. This is an expected message and not an error.

All existing enrollments for this Plan will be deleted to make room for the new entries. (4000,60)

You have selected to mass enroll all eligible Dependents or Beneficiaries. To make room for these automatic enrollments, all existing individual enrollments will first be removed, along with any current election information.

OK Cancel

32. Click the **OK** button to close the message.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Option Election** tab redisplay.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID [redacted] Stephon Gillmore Ben Record 0 Event ID 8
Event Data 07/01/2024 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ⓘ

Plan Type 10 : Medical

Option Code 40 COVA Cr+Exp Den+Out-of-ntwk (ACC3) (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	Curtis Gillmore	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	—
03	TYLER GILLMORE	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	—
04	Happy Gillmore	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	—
+							

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Note: The removed dependent no longer displays in the **Dependents/Beneficiaries** section.

33. Once all elections have been made/updated, click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

On-Demand Event Maintenance

Stephon Gillmore Person ID [] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 8 Event Date 07/01/2024 Status Entered Class DIV Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 1 of 1 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

Note: The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.

34. Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

A **Confirmation** message displays in a pop-up window once the process completes.

Process completed successfully. (3000,530)

OK



BN361_Creating and Completing a Life Event on behalf of an Employee

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

The screenshot shows the 'On-Demand Event Maintenance' page for an employee named Stephon Gillmore. The page includes a header with a back arrow and the title 'Benefit Event Detail'. Below the header, there are several sections for managing the event. A red box highlights the 'Status' field, which now displays 'Finalized - Enrolled', and the 'Event Status' field, which displays 'Closed to Processing'. The 'Save' button is also highlighted with a red box. Other fields include 'Event ID' (8), 'Event Date' (07/01/2024), 'Frequency' (Deduction Frequency), and 'Process Indicator' (N). Buttons for 'Event Status Update', 'Show Plans', 'Show Errors', and 'Finalize/Apply Defaults' are also visible.

Note: The **Status** field will now display as “Finalized-Enrolled”. The **Event Status** field will still display as “Closed to Processing”.

35. Click the **Save** button.

This process is now complete. Refer to the [Viewing the Employee's Benefit Information](#) section of this Job Aid to validate accuracy. Refer to the [Viewing/Printing a Confirmation Statement](#) if you need to print the Confirmation Statement for the employee.

BN361_Creating and Completing a Life Event on behalf of an Employee**Creating and Processing a Birth Event on behalf of an Employee (with a tag along dependent and Flex Spending Dependent Care change)**

This section of the Job Aid should be referenced when you are creating and processing a Birth Event on behalf of the employee wherein one or more tag along dependents will also be added to the employee's coverage. The steps included in this section of the Job Aid are based on the following example scenario:

Scenario: An employee had a child born on 6/21/2024. This employee is currently enrolled in a "Single" coverage code Health Plan. The employee submitted the appropriate supporting documentation for the birth and a benefits enrollment request form on 6/24/2024 to add their new child as a dependent and enroll them in their benefits. Additionally, the employee now wants to add their spouse to their coverage as a tag along dependent (eligible based on the qualifying birth event). Finally, the employee also now wants to enroll in the Flex Spending Dependent Care plan. The employee did not initiate this Qualifying Mid-Year Birth Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process multiple Benefit Events for this employee based on the following guidelines:

- Separate Benefit Events must be created for each of these enrollment changes as they will have different coverage begin dates
- The Health Plan coverage begin date for the newborn child will be immediate on the child's date of birth (6/21/2024 in this scenario)
- The Health Plan coverage begin date for the employee's spouse will be the first of the month in which the paperwork was received (6/1/2024 in this scenario)
- The enrollment in the Flex Spending Dependent Care plan will be effective as of the first of the month following the employee's enrollment (7/1/2024 in this scenario)
- These Benefit Events must be processed in the correct order (based on the coverage begin and effective dates). Specifically in this scenario, the tag along dependent must be enrolled first because that Benefit Event has the earliest coverage begin date. Subsequently, the newborn child can be enrolled next (separate Benefit Event being processed), and finally, the Flex Spending Dependent Care plan Benefit Event can be processed
- After the Benefit Event is processed to add the tag along dependent, the dependent's enrollment will be transmitted to the Health Vendor in the evening interface file. This must be completed before the Benefit Event to add the newborn child is processed. Therefore, the first Benefit Event to add the tag along dependent must be processed on one day (enrollment transmitted to the Health Vendor on that evening's interface file) and the Benefit Event to add the newborn child can be processed the next day (enrollment transmitted to the Health Vendor on that evening's interface file). These Benefit Events must be processed one day apart so that the Health Vendor is notified as of each effective date



BN361_Creating and Completing a Life Event on behalf of an Employee

1. First, the Benefit Event must be created in order to add the tag along dependent. Access the **Benefit Event** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Search** page displays.

Benefit Event Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by: Empl ID begins with

☐ Include History ☐ Correct History

Limit the number of results to (up to 300): 300

Search Advanced Search

2. Enter the employee's Employee ID in the **Search by** field.
Note: The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.
3. Click the **Search** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

The screenshot shows the 'Benefit Event' page for employee Thomas Jones32. The 'Life Event' dropdown menu is highlighted with a red box. Below it, the 'Life Event Date' and 'Paperwork Receipt Date' fields are visible. The 'Health Change' and 'FSA Change' sections are also present, each with a 'Change Needed' dropdown and a 'Change' dropdown. At the bottom, there are 'Special Processing Message' fields for Health and FSA, and 'Save' and 'Return to Search' buttons.

4. Click the **Life Event** dropdown button and select the applicable type of Life Event (Birth/Adoption in this scenario).

Note: Although this Benefit Event is being utilized to add the tag along dependent and not the newborn child, "Birth/Adoption" is still the correct selection here as this is the Life Event that opened up the employee's eligibility to add the tag along dependent. The appropriate change reason associated with this selection will be made later in this process (Step 9).

The **Benefit Event** page redisplay with the selected Life Event.

The screenshot shows the 'Benefit Event' page for employee Ham Biscuit. The 'Life Event' dropdown menu is set to 'Birth/Adoption'. The 'Life Event Date' and 'Paperwork Receipt Date' fields are highlighted with a red box. The 'Health Change' and 'FSA Change' sections are also present, each with a 'Change Needed' dropdown and a 'Change' dropdown. At the bottom, there are 'Special Processing Message' fields for Health and FSA, and 'Save' and 'Return to Search' buttons.



BN361_Creating and Completing a Life Event on behalf of an Employee

- Click the **Life Event Date Calendar** icon and select the applicable date ("6/21/2024" in this scenario).

Note: This is the date of the actual birth.

- Click the **Paperwork Receipt Date Calendar** icon and select the applicable date ("6/24/2024" in this scenario).

Note: This is the date that the Benefits Enrollment form was received from the employee.

The screenshot displays the 'Benefit Event' form in the Cardinal system. At the top, there's a navigation bar with 'Cardinal Homepage' and 'Benefit Event'. Below this is a 'Benefit Event Detail' tab. The form header shows 'Ham Biscuit' as the employee name, with fields for 'Employee ID' and 'Benefit Record Number' (0). The 'Life Event' section includes a dropdown for 'Life Event' (set to 'Birth/Adoption'), a calendar icon for 'Life Event Date' (06/21/2024), and a calendar icon for 'Paperwork Receipt Date' (06/24/2024). Below these are two main sections: 'Health Change' and 'FSA Change'. The 'Health Change' section has a 'Health Change Needed' dropdown (highlighted with a red box), 'Current Cov. Level', 'Future Cov. Level', and a 'Change' dropdown. The 'FSA Change' section has an 'FSA Change Needed' dropdown and a 'Change' dropdown. At the bottom, there are two text areas for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)'. The form concludes with 'Save' and 'Return to Search' buttons.

- Click the **Health Change Needed** dropdown button and select "Yes".

Note: Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select "Yes". If "Yes" is not selected, a Benefit Event will not be created.



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes.

The screenshot shows the 'Benefit Event Detail' form for a Life Event. The form includes the following fields and sections:

- Life Event:** Birth/Adoption (dropdown), Life Event Date: 06/21/2024 (calendar icon), Paperwork Receipt Date: 06/24/2024 (calendar icon).
- Health Change:** Health Change Needed: Yes (dropdown), Current Cov. Level: Single, Future Cov. Level: (dropdown), Change: (dropdown).
- FSA Change:** FSA Change Needed: (dropdown), Change: (dropdown).
- Special Processing Message (Health):** (text area)
- Special Processing Message (FSA):** (text area)
- Buttons:** Save, Return to Search.

Note: The **Current Cov. Level** field auto-populates with the employee's current Health Plan enrollment coverage level.

- Click the **Future Cov. Level** dropdown button and select the applicable coverage level.

Note: 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. For this Benefit Event, only select the applicable coverage code based on the tag along dependent(s) being added. The coverage code will be changed again as needed when the Birth Event to add the newborn is created.

- Click the **Change** dropdown button and select "Enroll/change health plan or add tag along dependent (1st of the month)".

Note: The selections available will vary based on the type of Life Event previously selected.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

Cardinal Homepage Benefit Event

Benefit Event Detail

Ham Biscuit Employee ID Benefit Record Number 0

Life Event 1 of 1 View All

Life Event Birth/Adoption +

Life Event Date 06/21/2024 Paperwork Receipt Date 06/24/2024

Health Change

Health Change Needed: Yes

Current Cov. Level: Single Future Cov. Level: Employee + Spouse

Change: Enroll/change health plan or add tag along

FSA Change

FSA Change Needed:

Change:

Special Processing Message (Health)

Special Processing Message (FSA)

Save Return to Search

Note: Do not enter any information in the **FSA Change** section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.

10. Click the **Save** button.

The page refreshes after the save action completes.

Cardinal Homepage Benefit Event

Benefit Event Detail

Ham Biscuit Employee ID Benefit Record Number 0

Life Event 1 of 1 View All

Life Event Birth/Adoption +

Life Event Date 06/21/2024 Paperwork Receipt Date 06/24/2024

Health Change

Health Change Needed: Yes

Current Cov. Level: Single Future Cov. Level: Employee + Spouse

Change: Enroll/change health plan or add tag along

FSA Change

FSA Change Needed:

Change:

Special Processing Message (Health)

Special Processing Message (FSA)

Save Return to Search



BN361_Creating and Completing a Life Event on behalf of an Employee

- After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions. 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.

Note: In this scenario, an FSC Benefit Event has been created solely for the purpose of adding and enrolling the employee's tag along dependent. This Benefit Event has a coverage begin date of the first of the current month ("6/1/2024" in this scenario). **Do not utilize this Benefit Event to add and enroll the newborn child dependent.**

- The first Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

The **On-Demand Event Maintenance Search** page displays.

- Enter the employee's Employee ID in the **Empl ID** field.
Note: 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.
- Click the **Search** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **On-Demand Event Maintenance** page displays for the applicable employee.

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 this, the page title 'On-Demand Event Maintenance' is displayed. The main content area includes several fields and buttons. A red box highlights the 'Activity Date' field with the value '06/01/2024' and the 'Source' field with the value 'Manual Event'. Another red box highlights the 'Show Activities' button and the 'Action' field with the value 'FSC'. Other visible fields include 'Person ID', 'Ben Record' (0), 'Empl Record' (0), 'Event ID' (0), 'Event Date', 'Status', 'Class', 'Event Status', 'Frequency' (with radio buttons for 'Deduction Frequency' and 'Annual Frequency'), 'Entered' (0 of 0), 'Errors' (0), 'Confirmation Statement', 'Run Date', 'Reprocess', 'Process Indicator' (N), and 'Normal Processing'. Buttons for 'Schedule/Prepare Activity', 'Event Status Update', 'Show Plans', 'Show Errors', 'Finalize/Apply Defaults', 'Save', 'Return to Search', and 'Notify' are also present.

15. Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to add a tag along dependent based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the first day of the month wherein the birth took place ("6/1/2024" in this scenario). Ensure that this date is accurate.

Note: The **Source** field will be "Manual Event". The **Action** field will default based on the type of Life Event ("FSC" in this scenario).

16. Click the **Show Activities** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **BAS Activity** page displays in a pop-up window.

Ham Biscuit

Person ID

Ben Record 0

BAS Activity

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	06/01/2024	0	FSC	

OK Cancel

17. Ensure that the **Select** checkbox option for the Manual Event is selected and then click the **OK** button.

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

< Cardinal Homepage On-Demand Event Maintenance

Ham Biscuit

Person ID Ben Record 0

Activity Date 06/01/2024 Source Manual Event Empl Record 0

Schedule/Prepare Activity Pending Activities 1 Show Activities Action FSC

Event ID 0 Event Date Status Class Event Status

Prepare Options

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

18. If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a "0". In this case, proceed to Step 21. If the **Pending Activities** field displays a "1", click the **Schedule/Prepare Activity** button.

Note: Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.



BN361_Creating and Completing a Life Event on behalf of an Employee

A **Confirmation** message displays in a pop-up window once the automated program completes.



19. Click the **OK** button.

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

The screenshot shows the 'On-Demand Event Maintenance' page. Key fields and buttons are highlighted with red boxes:

- Status:** Prepared
- Event Status:** Open for Processing
- Election Entry:** (button)

Other visible fields and buttons include:

- Person ID: [blank]
- Ben Record: 0
- Activity Date: [blank]
- Source: [blank]
- Empl Record: 0
- Event ID: 4
- Event Date: 06/01/2024
- Class: FSC
- Frequency: ☒ Deduction Frequency ☐ Annual Frequency
- Entered: 0 of 2
- Errors: 0
- Process Indicator: N
- Buttons: Schedule/Prepare Activity, Pending Activities, Show Activities, Action, Prepare Options, Enrollment Statement, Run Date, Show Plans, Show Errors, Finalize/Apply Defaults, Reprocess, Save, Return to Search, Notify.

20. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

Note: If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.

21. Click the **Election Entry** button.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Ham Biscuit Ben Record 0 Event ID 4
Event Data 06/01/2024 Benefit Change (BA Use) Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 2

Plan Type 10 : Medical

Option Code 25

COVA Care + Prev Dental (ACC0) (Single)

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
<input type="text"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>

Plan Type AY : Health Premium Reward

Option Code W

Waive Coverage [Special Requirements](#)

22. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and select the applicable coverage code.

Note: For this Benefit Event, only select the applicable coverage code based on the tag along dependent(s) being added. The coverage code will be changed again as needed when the Birth Event to add the newborn is processed.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Option Election** tab redisplay.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID [] Ham Biscuit Ben Record 0 Event ID 4
Event Data 06/01/2024 Benefit Change (BA Use) Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ?

Plan Type 10 : Medical

Option Code 26 COVA Care + Prev Dental (ACC0) (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
[]			[]	<input type="checkbox"/>		<input type="checkbox"/>

+ -

23. Next, add the tag along dependent(s). Click the **Dependents / Beneficiaries** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Dependent / Beneficiaries** tab displays.

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Ham Biscuit

Event ID

4

Event Data

06/01/2024

Benefit Change (BA Use)

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

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-------------------

OK

Cancel

Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries

24. Click the **Change/Add Dependent Data** link.



BN361_Creating and Completing a Life Event on behalf of an Employee

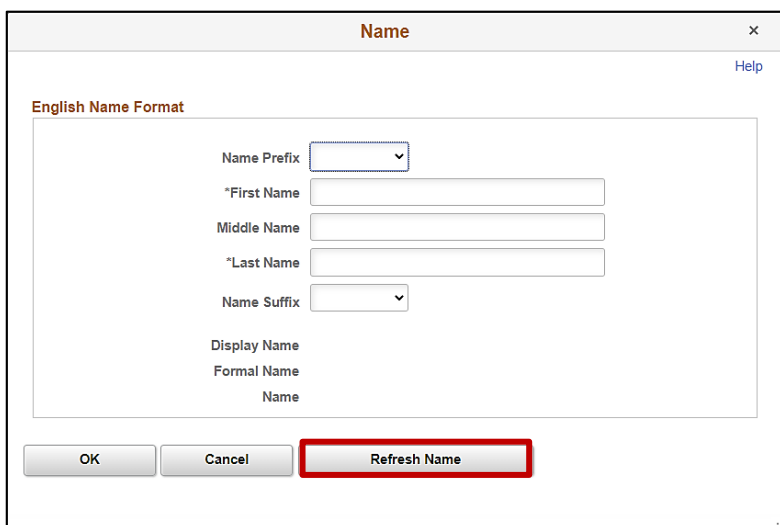
The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.

Note: For Life Events, the **Effective Date** field defaults to the date that the coverage will begin (in this scenario, a tag along dependent is being added based on a Birth event. Therefore, the **Effective Date** field defaults to the first day of the month wherein the birth took place). Do not change this date as it must match the Event Date or the system will not recognize this dependent as eligible for coverage. The **Dependent/Beneficiary ID** field will default to the next available Dependent/Beneficiary ID number ("01" in this scenario) and increment by 1 for each additional dependent subsequently added.

25. Click the **Edit Name** button.

BN361_Creating and Completing a Life Event on behalf of an Employee

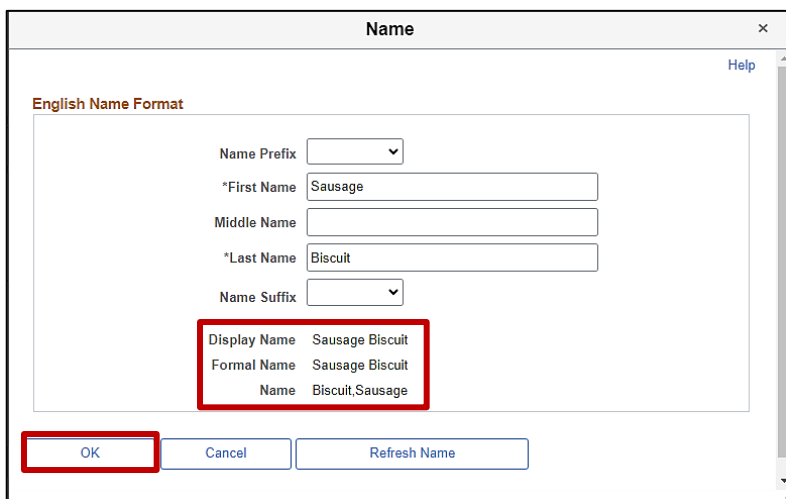
The **Name** page displays in a pop-up window.



26. At a minimum, enter the dependent's first and last name in the corresponding fields. The **Name Prefix**, **Middle Name**, and **Name Suffix** fields are optional but should be entered as applicable.

27. Click the **Refresh Name** button.

The **Name** page refreshes.



Note: The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.

28. Click the **OK** button.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Name** tab redispays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The 'Address' tab is highlighted with a red box. The form displays the name 'Ham Biscuit' and 'Person ID'. Below, the 'Dependent/Beneficiaries' section shows a table with one entry: 'Sausage Biscuit' with ID '01'. The 'Name History' section shows a table with one entry: 'Sausage Biscuit' with an effective date of '06/01/2024' and format type 'English'. The 'Display Name' field is highlighted with a red box and contains the text 'Sausage Biscuit'. The 'Edit Name' button is visible. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons. The breadcrumb trail at the bottom reads 'Name | Address | Personal Profile'.

Note: The **Display Name** field auto-populates with the name information previously entered.

29. Click the **Address** tab.

The **Address** tab displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Address' tab selected. The 'Name' tab is highlighted with a red box. The form displays the name 'Ham Biscuit' and 'Person ID'. Below, the 'Dependent/Beneficiaries' section shows a table with one entry: 'Sausage Biscuit' with ID '01'. The 'Address History' section shows a table with one entry: 'Sausage Biscuit' with an effective date of '06/01/2024' and address type 'Same Address as Employee'. The 'Address' section shows a form with a 'Country' dropdown set to 'USA' and a search button. The 'Edit Address' button is highlighted with a red box. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons. The breadcrumb trail at the bottom reads 'Name | Address | Personal Profile'.



BN361_Creating and Completing a Life Event on behalf of an Employee

30. Complete the address information as applicable for the dependent by either:
- Clicking the **Same Address as Employee** checkbox option (applicable for this example) or
 - Selecting the applicable **Address Type** using the dropdown button provided and then clicking the **Edit Address** button (the **Edit Address** page will display in a pop-up window and the applicable address information can be entered)

The **Address** tab refreshes.

Dependent/Beneficiary

Name Address **Personal Profile**

Dependent/Beneficiaries

Ham Biscuit

Person ID

Dependent/Beneficiary ID 01 Name Sausage Biscuit

Address History

*Effective Date 06/01/2024

☒ Same Address as Employee Address Type Home

Employee's Current Address

Country USA United States

Address 400 South Main St
Richmond, VA 23232

Note: The address information auto-populates in the **Employee's Current Address** section.

31. Click the **Personal Profile** tab.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Personal Profile** tab displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Personal Profile' tab selected. The form is divided into several sections. The 'Personal Profile' section is highlighted with a red box and contains the following fields: *Date of Birth (with a calendar icon), Birth Country (with a search icon), Date of Death (with a calendar icon), Medicare Entitled Date (with a calendar icon), Birth Location, Birth State (with a search icon), and a checkbox for 'Riders/Orders exist'. Below this is the 'Personal History' section, also highlighted with a red box, which includes: *Effective Date (06/01/2024 with a calendar icon), *Relationship to Employee (dropdown), *Dependent Beneficiary Type (dropdown), *Gender (Unknown dropdown), *Marital Status (Single dropdown), and checkboxes for Student, Disabled, and Smoker. There are also 'As of' date fields with calendar icons. The form has a search bar and a 'View All' button at the top right of the 'Personal History' section.

Note: The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor).

32. Click the **Date of Birth Calendar** icon and select the dependent's date of birth.
33. Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee ("Spouse" in this example).
34. Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent".

Note: "Approved Dependent" is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.

35. Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Female" in this example).



BN361_Creating and Completing a Life Event on behalf of an Employee

36. The **Marital Status** field defaults to “Single”. Updated as needed for the dependent (“Married” in this example).

Note: If any status other than “Single” is selected, select the applicable date using the **Marital Status As of Calendar** icon (“4/22/2020” in this example).

The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are tabs for "Name", "Address", and "Personal Profile", with "Personal Profile" being the active tab. Below the tabs, the name "Ham Biscuit" is displayed next to a "Person ID" field. The "Personal Profile" section contains fields for "Dependent/Beneficiary ID" (01), "Sausage Biscuit", "Date of Birth" (06/10/1991), "Birth Country", "Date of Death", "Medicare Entitled Date", "Birth Location", "Birth State", and "Riders/Orders exist". Below this is the "Personal History" section, which includes fields for "Effective Date" (06/01/2024), "Relationship to Employee" (Spouse), "Dependent Beneficiary Type" (Approved Dependent), "Gender" (Female), "Marital Status" (Married), and "As of" dates. There are also checkboxes for "Student", "Disabled", and "Smoker". The "Occupation" field is at the bottom.

37. Click the vertical scrollbar to scroll down on the page to the **National ID** section.



BN361_Creating and Completing a Life Event on behalf of an Employee

Dependent/Beneficiary

Date of Birth06/10/1991Birth LocationBirth CountryBirth StateDate of DeathMedicare Entitled Date

☐ Riders/Orders exist

Riders/Orders

Personal History

*Effective Date06/01/2024

*Relationship to EmployeeSpouse

*Dependent Beneficiary TypeApproved Dependent

*GenderFemale

*Marital StatusMarried

☐ Student

☐ Disabled

☐ Smoker

As of04/22/2020

As of

As of

As of

Occupation

USA

National ID

*CountryUSA

*National ID TypePR

DescriptionSocial Security Number

National ID

Primary ID

1-1 of 1

View All

OK

Cancel

Apply

Name

Address

Personal Profile

38. Enter the dependent's Social Security Number (SSN) in the **National ID** field.

Note: If the employee did not provide the dependent's SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the **Base Benefits Consistency Audit** report to monitor dependents with a missing SSN.

39. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Dependents / Beneficiaries** tab redisplay.

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Ham Biscuit

Event ID

4

Event Data

06/01/2024

Benefit Change (BA Use)

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
Biscuit,Sausage	Spouse	Approved Dependent	06/10/1991

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-----------------------------------

OK

Cancel

Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Note: The dependent just added displays in the **Dependent/Beneficiaries Currently on Record** section. If additional tag along dependents need to be added, repeat Steps 24 – 39 for each additional tag along dependent (in this scenario, no additional tag along dependents are being added).

40. Click the **Option Election** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Option Election** tab redisplay.

41. Next, enroll the dependent(s) in the previously selected Medical Plan by either:

- Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example) or
- Adding the applicable dependents individually using the **ID Look Up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (+...)



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes.

BenAdmin Data Entry

Event Data 06/01/2024 Benefit Change (BA Use) Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ? 1 of 2

Plan Type 10 : Medical

Option Code 26 COVA Care + Prev Dental (ACC0) (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	Sausage Biscuit	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="−"/>
<input type="button" value="⊕"/>							

Plan Type AY : Health Premium Reward

Option Code W Waive Coverage

Special Requirements

Event / Participant Selection | Option Election | Dependents / Beneficiaries

42. The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.
43. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

Cardinal Homepage On-Demand Event Maintenance

Ham Biscuit Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 4 Event Date 06/01/2024 Status Entered Class FSC Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 1 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

Note: The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.

44. Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

A **Confirmation** message displays in a pop-up window once the process completes.

Process completed successfully. (3000,530)

OK

45. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

Note: The **Status** field will now display as “Finalized-Enrolled”. The **Event Status** field will still display as “Closed to Processing”.

46. Click the **Save** button.

This Benefit Event to add the tag along dependent(s) is now complete. Refer to the [Viewing the Employee's Benefit Information](#) section of this Job Aid to validate accuracy. Refer to the [Viewing/Printing a Confirmation Statement](#) if you need to print the Confirmation Statement for the employee. This information will be transmitted to the Health Vendor in the evening interface file. On the next business day, proceed with Step 46.

47. Next, the Benefit Event must be created in order to add the newborn child dependent. Access the **Benefit Event** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Search** page displays.



BN361_Creating and Completing a Life Event on behalf of an Employee

48. Enter the employee's Employee ID in the **Search by** field.

Note: The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.

49. Click the **Search** button.

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

< Cardinal Homepage **Benefit Event**

Benefit Event Detail

Ham Biscuit Employee ID [redacted] Benefit Record Number 0

Life Event [Search] | 1 of 1 | View All

Life Event: Birth/Adoption [redacted] **+**

Life Event Date: 06/21/2024 Paperwork Receipt Date: 06/24/2024

Health Change

Health Change Needed: Yes [redacted]

Current Cov. Level: Single Future Cov. Level: Employee + Spouse [redacted]

Change: Enroll/change health plan or add tag along [redacted]

FSA Change

FSA Change Needed: [redacted]

Change: [redacted]

Special Processing Message (Health): A FSC event will be created to add the tag along dependents or change the health plan. DO NOT ADD THE NEW BABY TO THIS EVENT. This will allow you to update the plan or add dependents as of the 1st calendar day of the month. The worker will receive the tag along dependent on the previous interface.

Special Processing Message (FSA): [redacted]

Save Return to Search

Note: The Benefit Event Entry page displays with the information from any previously created Benefit Events for the employee (the first Birth Event in this scenario).

50. Click the **Add a new row** icon (+).



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes and the new row displays.

The screenshot shows the 'Benefit Event' page for 'Ham Biscuit'. The 'Life Event' dropdown is highlighted with a red box. Below it, the 'Life Event Date' and 'Paperwork Receipt Date' fields are visible. The 'Health Change' and 'FSA Change' sections are also present, each with a 'Change Needed' dropdown and a 'Change' dropdown. At the bottom, there are 'Special Processing Message' fields for Health and FSA, and 'Save' and 'Return to Search' buttons.

51. Click the **Life Event** dropdown button and select the applicable type of Life Event (Birth/Adoption in this scenario).

The **Benefit Event** page redisplays with the selected Life Event.

The screenshot shows the 'Benefit Event' page for 'Ham Biscuit' after selecting 'Birth/Adoption' from the 'Life Event' dropdown. The 'Life Event Date' and 'Paperwork Receipt Date' fields are highlighted with a red box. The 'Health Change' and 'FSA Change' sections are also present, each with a 'Change Needed' dropdown and a 'Change' dropdown. At the bottom, there are 'Special Processing Message' fields for Health and FSA, and 'Save' and 'Return to Search' buttons.



BN361_Creating and Completing a Life Event on behalf of an Employee

52. Click the **Life Event Date Calendar** icon and select the applicable date (“6/21/2024” in this scenario).

Note: This is the date of birth for the newborn dependent.

53. Click the **Paperwork Receipt Date Calendar** icon and select the applicable date (“6/24/2024” in this scenario).

Note: This is the date that the Benefits Enrollment form was received from the employee.

The screenshot displays the 'Benefit Event' form in the Cardinal system. The form is titled 'Benefit Event' and includes a 'Benefit Event Detail' tab. The employee information is 'Ham Biscuit', ID is [redacted], and the Benefit Record Number is 0. The 'Life Event' section shows 'Birth/Adoption' as the event type, with a 'Life Event Date' of 06/21/2024 and a 'Paperwork Receipt Date' of 06/24/2024. The 'Health Change' section is highlighted with a red box, showing 'Health Change Needed' as a dropdown menu. Below this are fields for 'Current Cov. Level', 'Future Cov. Level', and 'Change'. The 'FSA Change' section also has a dropdown for 'FSA Change Needed' and a 'Change' field. At the bottom, there are text areas for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)', and buttons for 'Save' and 'Return to Search'.

54. Click the **Health Change Needed** dropdown button and select “Yes”.

Note: Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes”. If “Yes” is not selected, a Benefit Event will not be created.



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes.

< Cardinal Homepage Benefit Event

Benefit Event Detail

Ham Biscuit Employee ID Benefit Record Number 0

Life Event Birth/Adoption +

Life Event Date 06/21/2024 Paperwork Receipt Date 06/24/2024

Health Change

Health Change Needed: Yes

Current Cov. Level: Self + Spouse Future Cov. Level:

Change:

FSA Change

FSA Change Needed:

Change:

Special Processing Message (Health)

Special Processing Message (FSA)

Save Return to Search

Note: The **Current Cov. Level** field auto-populates with the employee's current Health Plan enrollment coverage level.

55. Click the **Future Cov. Level** dropdown button and select the applicable coverage level.

Note: 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. For this Benefit Event, select the applicable coverage code based on the newborn dependent being added.

56. Click the **Change** dropdown button and select "Add newborn".

Note: The selections available will vary based on the type of Life Event previously selected.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

Cardinal Homepage Benefit Event

Benefit Event Detail

Ham Biscuit Employee ID Benefit Record Number 0

Life Event 3 of 3 [View All](#)

Life Event Birth/Adoption +

Life Event Date 06/21/2024 Paperwork Receipt Date 06/24/2024

Health Change

Health Change Needed: Yes Current Cov. Level: Self + Spouse Future Cov. Level: Family Change: Add newborn

FSA Change

FSA Change Needed: Change:

Special Processing Message (Health)

Special Processing Message (FSA)

Save Return to Search

Note: Do not enter any information in the **FSA Change** section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.

57. Click the **Save** button.

The page refreshes after the save action completes.

Cardinal Homepage Benefit Event

Benefit Event Detail

Ham Biscuit Employee ID Benefit Record Number 0

Life Event 3 of 3 [View All](#)

Life Event Birth/Adoption +

Life Event Date 06/21/2024 Paperwork Receipt Date 06/24/2024

Health Change

Health Change Needed: Yes Current Cov. Level: Self + Spouse Future Cov. Level: Family Change: Add newborn

FSA Change

FSA Change Needed: Change:

Special Processing Message (Health) A BIR event has been created on the On Demand Event Maintenance Page to enroll the new child to coverage. Note: If you are adding tag along dependents or changing plans, you must process the FSC event first before entering the BIR event. These transactions should be processed one day apart to the

Special Processing Message (FSA)

Save Return to Search



BN361_Creating and Completing a Life Event on behalf of an Employee

58. After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions. 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.

Note: In this scenario, an BIR Benefit Event has been created for the purpose of adding and enrolling the employee's newborn dependent. This Benefit Event has a coverage begin date of the actual date of birth ("6/21/2024" in this scenario).

59. This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

The **On-Demand Event Maintenance Search** page displays.

60. Enter the employee's Employee ID in the **Empl ID** field.

Note: 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.

61. Click the **Search** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **On-Demand Event Maintenance** page displays for the applicable employee.

The screenshot shows the 'On-Demand Event Maintenance' page. At the top, there's a header with 'Cardinal Homepage' and 'On-Demand Event Maintenance'. Below this, the page title 'On-Demand Event Maintenance' is displayed. The main content area includes several sections: 'Ham Biscuit' (Person ID, Ben Record 0), 'Activity Date' (06/21/2024), 'Source' (Manual Event), and 'Empl Record' (0). A red box highlights the 'Activity Date' field. Below these fields, there are buttons for 'Schedule/Prepare Activity', 'Show Activities' (highlighted with a red box), and 'Event Status Update'. The 'Show Activities' button is also labeled 'Action BIR'. Further down, there are sections for 'Event ID' (0), 'Event Date', 'Status', 'Class', and 'Event Status'. There are also buttons for 'Prepare Options', '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), and 'Normal Processing'. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'.

62. Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to add a newborn dependent based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the date of birth ("6/21/2024" in this scenario). Ensure that this date is accurate.

Note: The **Source** field will be "Manual Event". The **Action** field will default based on the type of Life Event ("BIR" in this scenario).

63. Click the **Show Activities** button.

The **BAS Activity** page displays in a pop-up window.

The screenshot shows the 'BAS Activity' pop-up window. At the top, there's a header with 'Ham Biscuit' (Person ID, Ben Record 0) and a 'Help' link. Below this, the title 'BAS Activity' is displayed. The main content area includes a search bar and a table with the following columns: 'Select', 'Empl Record', 'Action Source', 'Event Date', 'Event Effseq', 'BAS Action', and 'COBRA Action'. The first row of the table is highlighted with a red box, showing a checked checkbox, Empl Record 0, Action Source Manual Event, Event Date 06/21/2024, Event Effseq 0, BAS Action BIR, and COBRA Action. At the bottom of the table, there are '+' and '-' buttons. Below the table, there are buttons for 'OK' (highlighted with a red box) and 'Cancel'.



BN361_Creating and Completing a Life Event on behalf of an Employee

64. Ensure that the **Select** checkbox option for the Manual Event is selected and then click the **OK** button.

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

65. If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a "0". In this case, proceed to Step 68. If the **Pending Activities** field displays a "1", click the **Schedule/Prepare Activity** button.

Note: Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

A **Confirmation** message displays in a pop-up window once the automated program completes.

66. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

On-Demand Event Maintenance

Ham Biscuit Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 5 Event Date 06/21/2024 **Status Prepared** Class BIR **Event Status Open for Processing** Event Status Update

Prepare Options Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 0 of 1 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

67. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

Note: If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.

68. Click the **Election Entry** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Ham Biscuit Ben Record 0 Event ID 5
Event Data 06/21/2024 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code

COVA Care + Prev Dental (ACC0) (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	Sausage Biscuit	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>

[OK](#) [Cancel](#) [Apply](#) [Refresh](#)

Event / Participant Selection | Option Election | Dependents / Beneficiaries

69. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and select the applicable coverage code.

Note: For this Benefit Event, select the applicable coverage code based on the newborn dependent being added. If the coverage code does not need to be changed based on the addition of the newborn dependent, skip to Step 70. Please note that this Birth Event only allows the employee to change the coverage code. The actual Health Plan election cannot be changed.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Option Election** tab redisplay.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID [redacted] Ham Biscuit Ben Record 0 Event ID 5
Event Data 06/21/2024 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ?

Plan Type 10 : Medical

Option Code 28 COVA Care + Prev Dental (ACC0) (Family)

Health Provider ID [redacted] ☐ 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	Sausage Biscuit	Spouse	[redacted]	<input type="checkbox"/>	Spouse	<input type="checkbox"/>

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

70. Next, add the newborn dependent. Click the **Dependents / Beneficiaries** tab.

The **Dependent / Beneficiaries** tab displays.

BenAdmin Data Entry

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

Schedule ID EM00 Employee ID [redacted] Ham Biscuit
Event ID 5 Event Data 06/21/2024 Birth or Adoption
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
Biscuit, Sausage	Spouse	Approved Dependent	06/10/1991

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-------------------

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries



BN361_Creating and Completing a Life Event on behalf of an Employee

71. Click the **Change/Add Dependent Data** link.

The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.

72. First, add a new Dependent/Beneficiary ID. Click the **Add a new row** icon (+) within the **Dependent/Beneficiaries** section.



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes and the new row displays (Dependent/Beneficiary ID “02” in this scenario).

The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The form displays a table with one row for 'Ham Biscuit' with ID '02'. The 'Effective Date' is '06/21/2024' and the 'Format Type' is 'English'. The 'Edit Name' button is highlighted.

Note: For Life Events, the **Effective Date** field defaults to the date that the coverage will begin (in this scenario, a newborn dependent is being added based on a Birth event. Therefore, the **Effective Date** field defaults to the newborn’s date of birth (“6/21/2024” in this scenario)). Do not change this date as it must match the Event Date or the system will not recognize this dependent as eligible for coverage. The **Dependent/Beneficiary ID** field will default to the next available Dependent/Beneficiary ID number (“02” in this scenario) and increment by 1 for each additional dependent subsequently added.

73. Click the **Edit Name** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Name** page displays in a pop-up window.

The screenshot shows a pop-up window titled "Name" with a close button (X) in the top right corner. A "Help" link is also present. The main content area is titled "English Name Format" and contains several input fields: "Name Prefix" (a dropdown menu), "*First Name" (a text box), "Middle Name" (a text box), "*Last Name" (a text box), and "Name Suffix" (a dropdown menu). Below these fields are three labels: "Display Name", "Formal Name", and "Name". At the bottom of the window, there are three buttons: "OK", "Cancel", and "Refresh Name". The "Refresh Name" button is highlighted with a red rectangular box.

74. At a minimum, enter the dependent's first and last name in the corresponding fields. The **Name Prefix**, **Middle Name**, and **Name Suffix** fields are optional but should be entered as applicable.

75. Click the **Refresh Name** button.

The **Name** page refreshes.

The screenshot shows the same "Name" pop-up window after the "Refresh Name" button was clicked. The "First Name" field now contains the text "Bacon" and the "Last Name" field contains the text "Biscuit". Below these fields, the "Display Name", "Formal Name", and "Name" labels are now populated with the values "Bacon Biscuit", "Bacon Biscuit", and "Biscuit, Bacon" respectively. These three populated fields are highlighted with a red rectangular box. At the bottom of the window, the "OK", "Cancel", and "Refresh Name" buttons are still present. The "OK" button is now highlighted with a red rectangular box.

Note: The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.

76. Click the **OK** button.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Name** tab redisplay.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The 'Address' tab is highlighted with a red box. The form displays the name 'Ham Biscuit' and the Person ID. Below, the 'Dependent/Beneficiaries' section shows a list with one entry: 'Bacon Biscuit'. The 'Name History' section shows the effective date '06/21/2024' and the format type 'English'. The 'Display Name' field is highlighted with a red box and contains the text 'Bacon Biscuit'. The 'Edit Name' button is visible. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons.

Note: The **Display Name** field auto-populates with the name information previously entered.

77. Click the **Address** tab.

The **Address** tab displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Address' tab selected. The 'Name' tab is highlighted with a red box. The form displays the name 'Ham Biscuit' and the Person ID. Below, the 'Dependent/Beneficiaries' section shows a list with one entry: 'Bacon Biscuit'. The 'Address History' section shows the effective date '06/21/2024' and the address type 'Same Address as Employee'. The 'Address' section shows the country 'USA' and the address 'United States'. The 'Edit Address' button is highlighted with a red box. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons.



BN361_Creating and Completing a Life Event on behalf of an Employee

78. Complete the address information as applicable for the dependent by either:

- Clicking the **Same Address as Employee** checkbox option (applicable for this example) or
- Selecting the applicable **Address Type** using the dropdown button provided and then clicking the **Edit Address** button (the **Edit Address** page will display in a pop-up window and the applicable address information can be entered)

The **Address** tab refreshes.

The screenshot displays the 'Dependent/Beneficiary' form. At the top, there are three tabs: 'Name', 'Address', and 'Personal Profile'. The 'Personal Profile' tab is highlighted with a red box. Below the tabs, there is a section for 'Dependent/Beneficiaries' with a search bar and navigation controls. A table lists the dependents, with 'Ham Biscuit' as the first entry. Below this, there is a section for 'Address History' with a search bar and navigation controls. A table lists the address history, with one entry showing the 'Effective Date' as 06/21/2024, the 'Same Address as Employee' checkbox checked, and the 'Address Type' set to 'Home'. Below the address history, there is a section for 'Employee's Current Address' highlighted with a red box. This section contains the following information: Country: USA, United States; Address: 400 South Main St, Richmond, VA 23232.

Note: The address information auto-populates in the **Employee's Current Address** section.

79. Click the **Personal Profile** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Personal Profile** tab displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Personal Profile' tab selected. The form is titled 'Dependent/Beneficiary' and has a 'Help' button in the top right corner. The 'Personal Profile' section is highlighted with a red box and contains the following fields:

- *Date of Birth (calendar icon)
- Birth Country (search icon)
- Date of Death (calendar icon)
- Medicare Entitled Date (calendar icon)
- Birth Location
- Birth State (search icon)
- ☐ Riders/Orders exist

The 'Personal History' section is also highlighted with a red box and contains the following fields:

- *Effective Date (06/21/2024, calendar icon)
- *Relationship to Employee (dropdown)
- *Dependent Beneficiary Type (dropdown)
- *Gender (Unknown, dropdown)
- *Marital Status (Single, dropdown)
- As of (calendar icon)
- As of (calendar icon)
- As of (calendar icon)
- As of (calendar icon)
- ☐ Student
- ☐ Disabled
- ☐ Smoker
- Occupation

Note: The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor).

80. Click the **Date of Birth Calendar** icon and select the dependent's date of birth.
81. Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee ("Child" in this example).
82. Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent".

Note: "Approved Dependent" is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.

83. Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Male" in this example).



BN361_Creating and Completing a Life Event on behalf of an Employee

84. The **Marital Status** field defaults to “Single”. Do not update for this newborn dependent.

The screenshot shows a web application window titled "Dependent/Beneficiary". At the top, there are tabs for "Name", "Address", and "Personal Profile", with "Personal Profile" being the active tab. Below the tabs, the form is divided into two main sections: "Personal Profile" and "Personal History".

Personal Profile Section:

- At the top, there is a "Person ID" field.
- Below that, there is a "Personal Profile" header with a search icon and navigation controls (2 of 2, View All).
- The main content area shows "Dependent/Beneficiary ID 02" and "Bacon Biscuit".
- Fields include: *Date of Birth (06/21/2024), Birth Country (searchable), Date of Death (calendar icon), Medicare Entitled Date (calendar icon), Birth Location (text field), Birth State (searchable), and a checkbox for "Riders/Orders exist".
- There is a "Riders/Orders" link below the checkbox.

Personal History Section:

- At the top, there is a "Personal History" header with a search icon and navigation controls (1 of 1, View All).
- The main content area shows: *Effective Date (06/21/2024), *Relationship to Employee (Child), *Dependent Beneficiary Type (Approved Dependent), *Gender (Male), and *Marital Status (Single).
- Below the marital status, there are checkboxes for "Student", "Disabled", and "Smoker".
- There are four "As of" date fields with calendar icons.
- At the bottom, there is an "Occupation" text field.

85. Click the vertical scrollbar to scroll down on the page to the **National ID** section.



BN361_Creating and Completing a Life Event on behalf of an Employee

Dependent/Beneficiary

Date of Death

Medicare Entitled Date

☐ Riders/Orders exist

Riders/Orders

Personal History

*Effective Date

*Relationship to Employee

*Dependent Beneficiary Type

*Gender

*Marital Status

As of

As of

As of

As of

Student

Disabled

Smoker

Occupation

USA

National ID

*Country

*National ID Type

Description

National ID

Primary ID

USA

PR

Social Security Number

☒

OK

Cancel

Apply

Name

Address

Personal Profile

86. Enter the dependent's Social Security Number (SSN) in the **National ID** field.

Note: If the employee did not provide the dependent's SSN, or in the case of a newborn, the SSN has not been obtained yet, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the **Base Benefits Consistency Audit** report to monitor dependents with a missing SSN.

87. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Dependents / Beneficiaries** tab redisplay.

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Ham Biscuit

Event ID

5

Event Data

06/21/2024

Birth or Adoption

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
Biscuit,Sausage	Spouse	Approved Dependent	06/10/1991
Biscuit,Bacon	Child	Approved Dependent	06/21/2024

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-------------------

OK

Cancel

Apply

Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Note: The dependent just added displays in the **Dependent/Beneficiaries Currently on Record** section.

88. Click the **Option Election** tab.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Option Election** tab redisplay.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Ham Biscuit Ben Record 0 Event ID 5
Event Data 06/21/2024 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ②

Plan Type 10 : Medical

Option Code 28 COVA Care + Prev Dental (ACC0) (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	Sausage Biscuit	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	—
<input type="button" value="+..."/>							

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

89. Next, enroll the dependent(s) in the previously selected Medical Plan by either:

- Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example) or
- Adding the applicable dependents individually using the **ID Look Up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (+...)



BN361_Creating and Completing a Life Event on behalf of an Employee

A message displays in a pop-up window.

All existing enrollments for this Plan will be deleted to make room for the new entries. (4000,60)

You have selected to mass enroll all eligible Dependents or Beneficiaries. To make room for these automatic enrollments, all existing individual enrollments will first be removed, along with any current election information.

OK Cancel

90. This is not an error message. It is just a message confirming that all dependents will be removed and then all eligible dependents will be enrolled. Click the **OK** button.

The **Option Election** tab redisplay.

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Ham Biscuit Ben Record 0 Event ID 5
Event Data 06/21/2024 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 28 COVA Care + Prev Dental (ACC0) (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	Sausage Biscuit	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	—
02	Bacon Biscuit	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	—

Dependents/Beneficiaries

OK Cancel Apply Refresh

91. The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.

92. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

Cardinal Homepage On-Demand Event Maintenance

On-Demand Event Maintenance

Ham Biscuit Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 5 Event Date 06/21/2024 Status Entered Class BIR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 1 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

Save Return to Search Previous in List Next in List Notify

Note: The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.

93. Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

A **Confirmation** message displays in a pop-up window once the process completes.

Process completed successfully. (3000,530)

OK

94. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

On-Demand Event Maintenance

Ham Biscuit Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 5 Event Date 06/21/2024 Status Finalized - Enrolled Class BIR 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 Previous in List Next in List Notify

Note: The **Status** field will now display as “Finalized-Enrolled”. The **Event Status** field will still display as “Closed to Processing”.

95. Click the **Save** button.

This Benefit Event to add the newborn dependent is now complete. Refer to the [Viewing the Employee's Benefit Information](#) section of this Job Aid to validate accuracy. Refer to the [Viewing/Printing a Confirmation Statement](#) if you need to print the Confirmation Statement for the employee. This information will be transmitted to the Health Vendor in the evening interface file. If no other elections are being made by the employee, this process is complete. However, if any Flex Spending elections are being made (as in this scenario), continue with Step 96.

96. Next, the Benefit Event must be created in order to enroll the employee in the Flex Spending Dependent Care plan. Access the **Benefit Event** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Search** page displays.

Benefit Event Entry

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

Search Criteria

Search by: Empl ID begins with

Include History Correct History

Limit the number of results to (up to 300): 300

Search Advanced Search



BN361_Creating and Completing a Life Event on behalf of an Employee

97. Enter the employee's Employee ID in the **Search by** field.

Note: The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.

98. Click the **Search** button.

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

Note: The **Benefit Event Entry** page displays with the information from any previously created Benefit Events for the employee.

99. Click the **Add a new row** icon (+).



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes and the new row displays.

The screenshot shows the 'Benefit Event' page in the Cardinal system. At the top, there's a navigation bar with '< Cardinal Homepage' and 'Benefit Event'. Below this is a 'Benefit Event Detail' tab. The main content area displays employee information: 'Ham Biscuit', 'Employee', 'ID', and 'Benefit Record Number 0'. A 'Life Event' section is highlighted with a red box, showing a dropdown menu. Below this, there are fields for 'Life Event Date' and 'Paperwork Receipt Date'. The 'Health Change' section includes 'Health Change Needed', 'Current Cov. Level', 'Future Cov. Level', and 'Change' dropdowns. The 'FSA Change' section includes 'FSA Change Needed' and 'Change' dropdowns. At the bottom, there are 'Special Processing Message (Health)' and 'Special Processing Message (FSA)' text areas. A 'Save' button and a 'Return to Search' button are at the bottom left.

100. Click the **Life Event** dropdown button and select the applicable type of Life Event (Dependent Care Cost/Coverage Change in this scenario).

The **Benefit Event** page redisplay with the selected Life Event.

The screenshot shows the 'Benefit Event' page after selecting 'Dependent Care Cost/Coverage Change' from the 'Life Event' dropdown. The dropdown is now populated with the selected value. The 'Life Event Date' and 'Paperwork Receipt Date' fields are highlighted with a red box. The rest of the page, including the 'Health Change' and 'FSA Change' sections, remains the same as in the previous screenshot.



BN361_Creating and Completing a Life Event on behalf of an Employee

101. Click the **Life Event Date Calendar** icon and select the applicable date (“6/21/2024” in this scenario).

Note: This is the date of birth for the newborn dependent as this is the Life Event which occurred that made the employee eligible for this enrollment change.

102. Click the **Paperwork Receipt Date Calendar** icon and select the applicable date (“6/24/2024” in this scenario).

Note: This is the date that the Benefits Enrollment form was received from the employee.

The screenshot displays the 'Benefit Event' form in the Cardinal system. The form is titled 'Benefit Event Detail' and shows the employee 'Ham Biscuit'. The 'Life Event' section is active, with a dropdown menu set to 'Dependent Care Cost/Coverage Change'. The 'Life Event Date' is set to '06/21/2024' and the 'Paperwork Receipt Date' is set to '06/24/2024'. Below these, there are two main sections: 'Health Change' and 'FSA Change'. The 'FSA Change' section has a red box around the 'FSA Change Needed' dropdown menu, which is currently set to 'No'. The 'Change' dropdown for FSA is also visible. At the bottom, there are two text areas for 'Special Processing Message (Health)' and 'Special Processing Message (FSA)', and two buttons: 'Save' and 'Return to Search'.

103. Click the **FSA Change Needed** dropdown button and select “Yes”.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes.

< Cardinal Homepage **Benefit Event**

Benefit Event Detail

Ham Biscuit Employee ID 00860047500 Benefit Record Number 0

Life Event Dependent Care Cost/Coverage Change +

Life Event Date 06/21/2024 📅 Paperwork Receipt Date 06/24/2024 📅

Health Change

Health Change Needed: ⌵

Current Cov. Level: ⌵ Future Cov. Level: ⌵

Change: ⌵

FSA Change

FSA Change Needed: Yes ⌵

Change: ⌵

Special Processing Message (Health) 📄

Special Processing Message (FSA) 📄

Save Return to Search

104. Click the **Change** dropdown button and select “Update dependent care enrollment”.

105. Click the **Save** button.

The page refreshes after the save action completes.

< Cardinal Homepage **Benefit Event**

Benefit Event Detail

Ham Biscuit Employee ID 00860047500 Benefit Record Number 0

Life Event Dependent Care Cost/Coverage Change +

Life Event Date 06/21/2024 📅 Paperwork Receipt Date 06/24/2024 📅

Health Change

Health Change Needed: ⌵

Current Cov. Level: ⌵ Future Cov. Level: ⌵

Change: ⌵

FSA Change

FSA Change Needed: Yes ⌵

Change: Update dependent care enrollment ⌵

Special Processing Message (Health) 📄

Special Processing Message (FSA) 📄 An FSC event has been created for you to update the Dependent Care enrollment. Reminder: You are not allowed to make changes to Medical FSA for this life event. Required Documentation.

Save Return to Search



BN361_Creating and Completing a Life Event on behalf of an Employee

106. After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions. 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.

Note: In this scenario, an FSC Benefit Event has been created for the purpose of enrolling the employee in the Flex Spending Dependent Care plan. This Benefit Event has a coverage begin date of the first day of the following month ("7/1/2024" in this scenario).

107. This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path:

Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

The **On-Demand Event Maintenance Search** page displays.

108. Enter the employee's Employee ID in the **Empl ID** field.

Note: 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.

109. Click the **Search** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **On-Demand Event Maintenance** page displays for the applicable employee.

On-Demand Event Maintenance

Ham Biscuit Person ID [redacted] Ben Record 0

Activity Date 07/01/2024 Source Manual Event Empl Record 0

[Schedule/Prepare Activity](#) Pending Activities 1 [Show Activities](#) Action FSD

Event ID 0 Event Date Status Class [Event Status Update](#)

[Prepare Options](#)

[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](#)

110. Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to enroll the employee in the Flex Spending Dependent Care plan based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the first day of the following month ("7/1/2024" in this scenario). Ensure that this date is accurate.

Note: The **Source** field will be "Manual Event". The **Action** field will default based on the type of Life Event ("FSD" in this scenario).

111. Click the **Show Activities** button.

The **BAS Activity** page displays in a pop-up window.

BAS Activity

Ham Biscuit Person ID [redacted] Ben Record 0

[Help](#)

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	07/01/2024	0	FSD	

[OK](#) [Cancel](#)



BN361_Creating and Completing a Life Event on behalf of an Employee

112. Ensure that the **Select** checkbox option for the Manual Event is selected and then click the **OK** button.

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

113. If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a "0". In this case, proceed to Step 116. If the **Pending Activities** field displays a "1", click the **Schedule/Prepare Activity** button.

Note: Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

A **Confirmation** message displays in a pop-up window once the automated program completes.

114. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

The screenshot displays the 'On-Demand Event Maintenance' interface. At the top, there's a header with a back arrow and 'Benefit Event Detail' on the left, and 'On-Demand Event Maintenance' on the right. Below this, the main content area is titled 'On-Demand Event Maintenance'. It shows details for a life event: 'Ham Biscuit' (Person ID: [redacted], Ben Record: 0), 'Activity Date' (07/01/2024), 'Source' (Pending Activities: 0), and 'Empl Record' (0). The 'Event ID' is 6, and the 'Event Date' is 07/01/2024. The 'Status' is 'Prepared' (highlighted with a red box), and the 'Class' is 'FSD'. The 'Event Status' is 'Open for Processing' (highlighted with a red box). There are buttons for 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Run Date', 'Frequency' (Deduction Frequency selected), 'Election Entry' (highlighted with a red box), 'Show Plans', 'Validate/Finalize', 'Errors' (0), 'Show Errors', 'Finalize/Apply Defaults', 'Confirmation Statement', 'Run Date', 'Reprocess', 'Process Indicator' (N), and 'Normal Processing'. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'.

115. Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

Note: If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.

116. Click the **Election Entry** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

BenAdmin Data Entry

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

Sched ID EM00 Emp ID [Redacted] Ham Biscuit Ben Record 0 Event ID 6
Event Data 07/01/2024 Dependent Care Cost/Covrg Chg Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 61 : Flex Spending Dependent Care

Option Code W Waive Coverage

Annual Pledge \$0.00

Employee Contribution Override

Contribution Worksheet

Special Requirements

Plan Type AZ : Flex Spending Admin Fee

Option Code 1 Flex Spending Admin Fee (FLXFEE)

Special Requirements

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Note: Based on the manual event created, only the **Plan Type 61: Flex Spending Dependent Care** and **Plan Type AZ: Flex Spending Admin Fee** sections display.

117. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 61: Flex Spending Dependent Care** section and select the applicable coverage code (Option Code 1).



BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes based on the selection.

The screenshot shows the BenAdmin Data Entry interface. The 'Option Election' tab is active. The form displays the following information:

- Event / Participant Selection:** Sched ID EM00, Empl ID [redacted], Ham Biscuit, Ben Record 0, Event ID 6.
- Event Data:** 07/01/2024, Dependent Care Cost/Covrg Chg, Excess Credit Rollover To, Forfeit Excess Credits.
- Available Plans and Options:** Plan Type 61: Flex Spending Dependent Care.
- Option Code:** 1 (searched).
- Dependent Care FSA (FLXDCR):** Annual Pledge \$0.00 (highlighted with a red box).
- Employee Contribution Override:** Monthly.
- Contribution Worksheet:** Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount. The worksheet shows: Annual Pledge (\$0.00) - Contributions YTD (\$0.00) / Pay Periods Remaining (12) = Pay Period Amount (\$0.00) = Employee Contribution (\$0.00 Monthly). A 'Calculate' button is present.
- Plan Type AZ: Flex Spending Admin Fee:** Option Code 1 (searched), Flex Spending Admin Fee (FLXFEE).

118. Enter the applicable amount in the **Annual Pledge** field based on the employee's Benefit Enrollment form ("1,000.00" in this scenario).

Note: The fields within the **Contribution Worksheet** section can also be used to calculate the annual pledge amount if the employee provided a per Pay Period amount.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

BenAdmin Data Entry

Sched ID: EM00 Emp ID: Ham Biscuit Ben Record: 0 Event ID: 6
Event Data: 07/01/2024 Dependent Care Cost/Covrg Chg Excess Credit Rollover To: Forfeit Excess Credits

Available Plans and Options 1 of 2

Plan Type 61 : Flex Spending Dependent Care

Option Code:

Dependent Care FSA (FLXDCR)

Annual Pledge:

Employee Contribution Override: Monthly

Contribution Worksheet

Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount.

Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
(<input)="" -<="" td="" type="text" value="\$0.00"/> <td><input)="" <="" td="" type="text" value="\$0.00"/><td><input =<="" td="" type="text" value="12"/><td><input =<="" td="" type="text" value="\$0.00"/><td><input monthly<="" td="" type="text" value="\$0.00"/></td></td></td></td>	<input)="" <="" td="" type="text" value="\$0.00"/> <td><input =<="" td="" type="text" value="12"/><td><input =<="" td="" type="text" value="\$0.00"/><td><input monthly<="" td="" type="text" value="\$0.00"/></td></td></td>	<input =<="" td="" type="text" value="12"/> <td><input =<="" td="" type="text" value="\$0.00"/><td><input monthly<="" td="" type="text" value="\$0.00"/></td></td>	<input =<="" td="" type="text" value="\$0.00"/> <td><input monthly<="" td="" type="text" value="\$0.00"/></td>	<input monthly<="" td="" type="text" value="\$0.00"/>

Open protected fields for change. (These fields are normally determined by the system).

[Special Requirements](#)

Plan Type AZ : Flex Spending Admin Fee

Option Code:

Flex Spending Admin Fee (FLXFEE)

[Special Requirements](#)

Event / Participant Selection | Option Election | Dependents / Beneficiaries

119. Complete the **Plan Type AZ: Flex Spending Admin Fee** section as needed. If the employee is enrolled in one or more Flex Spending Accounts (Flex Spending Medical or Flex Spending Dependent Care plan), the employee must be enrolled in the Flex Spending Admin Fee (Option Code 1). In this scenario, the employee was already enrolled in the Flex Spending Medical plan and therefore, is already enrolled in the Flex Spending Admin Fee.
120. Once complete, click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

On-Demand Event Maintenance

Cardinal Homepage

Person ID [] Ben Record 0

Activity Date [] Source [] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

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

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry Entered 1 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

Note: The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.

121. Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

A **Confirmation** message displays in a pop-up window once the process completes.

Process completed successfully. (3000,530)

OK

122. Click the **OK** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

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

The screenshot shows the 'On-Demand Event Maintenance' page. At the top, there's a header with a back arrow and 'Cardinal Homepage' on the left, and 'On-Demand Event Maintenance' on the right. Below this, the page title 'On-Demand Event Maintenance' is displayed. The main content area shows details for a life event for 'Ham Biscuit'. The 'Person ID' is [redacted] and 'Ben Record' is 0. The 'Activity Date' is [redacted] and 'Source' is [redacted]. The 'Empl Record' is 0. There are buttons for 'Schedule/Prepare Activity', 'Pending Activities' (0), 'Show Activities', and 'Action'. Below these, the 'Event ID' is 6 and 'Event Date' is 07/01/2024. The 'Status' is 'Finalized - Enrolled' and 'Class' is 'FSD'. The 'Event Status' is 'Closed to Processing'. There is an 'Event Status Update' button. Below this, there are buttons for 'Prepare Options' and 'Enrollment Statement'. The 'Run Date' is [redacted]. There is a 'Frequency' section with radio buttons for 'Deduction Frequency' (selected) and 'Annual Frequency'. Below this, there are buttons for 'Election Entry', 'Validate/Finalize', and 'Confirmation Statement'. The 'Entered' count is 0 of 0. There are buttons for 'Show Plans' and 'Show Errors'. The 'Errors' count is 0. There is a 'Reprocess' button and a 'Process Indicator' set to 'N'. The 'Normal Processing' status is displayed. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'. The 'Save' button is highlighted with a red box.

Note: The **Status** field will now display as “Finalized-Enrolled”. The **Event Status** field will still display as “Closed to Processing”.

123. Click the **Save** button.

This Benefit Event to add the newborn dependent is now complete. Refer to the [Viewing the Employee's Benefit Information](#) section of this Job Aid to validate accuracy. Refer to the [Viewing/Printing a Confirmation Statement](#) if you need to print the Confirmation Statement for the employee.



BN361_Creating and Completing a Life Event on behalf of an Employee

Viewing the Employee's Benefits Information

After completing a manual Benefit Event, the Benefits Administrator should view the employee's benefits information to ensure accuracy. This can be completed at any point after the Benefit Event has been finalized.

1. Access the **Current Benefits Summary** page using the following navigation path:

Menu > Benefits > Review Employee Benefits > Current Benefits Summary

The **Current Benefits Summary Search** page displays.

2. Enter the employee's Employee ID in the **Empl ID** field.

Note: 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.

3. Click the **Search** button.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Current Benefits Summary** page displays for the applicable employee with the **Benefit Enrollment Summary** tab displayed by default.

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACC4	COVA EVH	Family	07/01/2022
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	05/25/2019
403(b)	Waive			Waived	10/01/2022
Section 457	Waive			Waived	10/01/2022
VRS Hb Vol Defined Contr	Elect	HVC050	HVC050	0.5% Before Tax	09/25/2022
Flex Spending Medical	Waive			Waived	07/01/2022
Flex Spending Dependent Care	Waive			Waived	07/01/2022
Employee Retirement DB	Elect	HVRMDB	VRS HB MDB	4% of Earnings	09/25/2022
Hybrid Retirement	Elect	HBOBER	HBOBER	0% of Earnings	09/25/2022
Group Term Life	Elect	GTLR	GTL Reg	0% of Earnings	09/25/2022

4. Review the information within the **Current Enrollments** section and reconcile against the benefits enrollment form submitted by the employee to ensure accuracy.

Note: If any data entry errors are identified, refer to the Job Aid titled **BN361_Re-opening and Reprocessing a Benefit Event**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

5. Click the **Benefit Deduction Summary** tab.

The **Benefit Deduction Summary** tab displays.

Plan Type	Benefit Plan	Dedn Code	Description	Class	Coverage Base	Last Deduction	Pay Period End
10	ACC4	CVACRE	COVACARE	Before-Tax		220.00	10/24/2022
				Nontaxable Benefit		929.50	10/24/2022
23	IMPLIF	IMPLIF	Imp Life	Taxable Benefit	164000.00	26.22	10/09/2022
4W	HVC050	HYBVDC	HYB VDC	Before-Tax		17.06	10/24/2022
				Nontaxable Btax Benefit		17.06	10/24/2022
70	HVRMDB	HVRMDB	HVRMDB	Before-Tax	3412.50	136.50	10/24/2022
				Nontaxable Benefit	3412.50	459.32	10/24/2022
7V	HBOBER	HBOBER	HYB Rmt	Nontaxable Benefit	442.26	442.26	10/24/2022
7W	GTLR	GRPLFR	Grp Life	Nontaxable Benefit	3412.50	45.73	10/24/2022
7X	RTCRDR	RETHCR	Ret Hlth	Nontaxable Benefit	3412.50	38.22	10/24/2022

6. Review the employee's pay group, payroll status, and deductions information to ensure accuracy. If any issues are identified, coordinate corrective action with an Agency HR Administrator and/or an Agency Payroll Administrator.



BN361_Creating and Completing a Life Event on behalf of an Employee

Viewing/Printing a Confirmation Statement

After completing the benefits enrollment change, the employee should receive an email with their Confirmation Statement after the next Benefits Administration process runs. However, if the employee does not have an email defined in Cardinal yet, or did not receive the email, the Agency BA can follow the steps in this section to view and print a Confirmation Statement for the employee.

1. Access the **Current Benefits Summary** page using the following navigation path:

Benefits Administrator Tile > Review Employee Benefits > Review Employee Statements

The **Review Employee Statements Search** page displays.

2. Enter the employee's Employee ID in the **Employee ID** field.

Note: 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.

3. Click the **Search** button.

The page refreshes with the search results displayed in the **Select Employees** section.

4. Click anywhere in the corresponding row for the employee within the **Select Employees** section.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The **Review Employee Statements** page displays for the selected employee.

Event Date	Issue Date	Seq	Enrollment Event	Statement Type
07/01/2022	06/01/2022 10:08:19PM	2	Open Enrollment May 2022 COVA	Confirmation Statement
07/01/2022	05/10/2022 8:08:18PM	0	Open Enrollment May 2022 COVA	Confirmation Statement

- Click the **Statement Type** dropdown button and select "Confirmation Statement".

The page refreshes.

Event Date	Issue Date	Seq	Enrollment Event	Statement Type
07/01/2022	06/01/2022 10:08:19PM	2	Open Enrollment May 2022 COVA	Confirmation Statement
07/01/2022	05/10/2022 8:08:18PM	0	Open Enrollment May 2022 COVA	Confirmation Statement

- Click anywhere in the corresponding row for the applicable Benefit Event (Open Enrollment May 2022 COVA (Seq Number 2) will be opened in this example).

The **Benefits Statement** page displays for the applicable Benefit Event.

Statement Type	Statement Issue Date	Description	Print View
Confirmation Statement	06/01/2022 10:08PM	Open Enrollment May 2022 COVA	Print View

This statement confirms your Open Enrollment May 2022 COVA benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

- [Expand All](#)
- [Personal Information](#)
- [Cost Summary](#)
- [Election Summary](#)
- [Dependents and Beneficiaries](#)
- [Dependent Enrollments](#)
- [Investment Allocations](#)

- Click the **Expand All** button to view the detailed information.



Benefits Job Aid

BN361_Creating and Completing a Life Event on behalf of an Employee

The page refreshes with the sections expanded.

Statement Type: Confirmation Statement
Description: Open Enrollment May 2022 COVA
Statement Issue Date: 06/01/2022 10:08PM

This statement confirms your Open Enrollment May 2022 COVA benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

Personal Information
This is your personal information currently on file. It is important that the data shown is complete and correct. If this information is not correct, update the information through the Personal Information or contact your Benefits Administrator.

Contact Information

Name	
Mailing Address	
Email Address	

Eligibility Information

Home Address	
Gender	
Marital Status	
Birth Date	
Service Date	

Cost Summary
This is a summary of the cost of your benefits. Details are in the Election Summary section.

Your Cost Per Pay Period	\$ 93.00
Full Cost	\$ 110.00
Employer Cost	\$ 647.00

Medical

8. Review the information as needed. Use the vertical scrollbar to scroll down and view all of the information.

9. Click the **Print View** button.

The **Confirmation Statement** opens as a PDF document. If the Confirmation Statement does not display, you may need to allow pop-ups from the website.

BEN_Conf_Stmt.pdf

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Cardinal

CONFIRMATION OF 2022 ELECTIONS
OPEN ENROLLMENT MAY 2022 COVA
Statement Issue Date: 06/01/2022

Employee ID:

This statement confirms your recent benefit elections. These coverages will remain in effect until you experience a change in family status or in your employment situation. If an error has been made in recording your elections, please contact your benefits administrator. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address	
Email Address	
Gender	
Marital Status	
Birth Date	

ELECTION SUMMARY

Benefit	Coverage	Category	Base	Your Cost Per Pay Period
COVA Care + Prev Dental	EI+Spouse			\$ 110.00
Flex Spending Medical				
Flex Spending Dependent Care				
Premium Reward Pay & Spouse				\$ -17.00
Flex Spending Admin Fee				

*Cost Reflected above are per pay period for agencies paid by the cardinal system, monthly for all others

HEALTH DEPENDENTS

Name	Date of Birth	Relationship	Dependent Benefit Type
		Spouse	Approved Dependent

DEPENDENTS ENROLLMENTS

Benefit Option	Dependent
COVA Care + Prev Dental	

10. Save and/or print the document as needed.