

Re-opening and Reprocessing a Benefit Event Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to re-open and reprocess a Benefit Event after the Benefit Event was validated and finalized. Re-opening a Benefit Event may be required in any of the following circumstances:

- Additional dependents need to be enrolled
- Additional enrollments need to be completed
- Updates or corrections to the enrollments or dependents information are needed

Benefit Events should only be re-opened within their original enrollment window. Request permission from the Office of Health Benefits (OHB) prior to re-opening a Benefit Event outside of the original enrollment window.

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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Re-opening and Reprocessing a Benefit Event

1. To re-open a Benefit Event, 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.

| Cardinal Homepage | On-Demand Event Maintenance | Â | Q | : | ۵ |
|--------------------------------|--|---|-------|--------|------|
| On-Demand Event M | - | | New W | Vindow | Help |
| On-Demand Event N | aintenance | | | | |
| Enter any information you ha | e and click Search. Leave fields blank for a list of all values. | | | | |
| Find an Existing Value | | | | | |
| ▼ Search Criteria | | | | | |
| Empl ID | begins with 🔹 | | | | |
| Empl Record | = v | | | | |
| Name | begins with 🗸 | | | | |
| Last Name | begins with 🗸 | | | | |
| Second Last Name | begins with 👻 | | | | |
| Alternate Character Name | begins with 🔹 | | | | |
| Case Sensitive | | | | | |
| Limit the number of results to | (up to 300): 300 | | | | |
| Search Clear Ba | sic Search 📴 Save Search Criteria | | | | |

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.

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

| < Cardinal Homepage | | On-Demand Event Maintenance | | ^ (| λ: | ۲ |
|---------------------------|---------------------|--|--------|------------|----------|----------|
| On-Demand Event Maintenan | ce | New 1 | Vindow | Help | Personal | ize Page |
| | | Person ID Ben Record 0 | | | | |
| Activity Date | Source | Empl Record 0 | | | | |
| Schedule/Prepare Activity | Pending Activities | Show Activities Action | | | | |
| Event ID 0 Event Date | Status | Class Event Status Update | | | | |
| Prepare Options | | Event Status | | | | |
| Enrollment Statement | Run Date | Frequency | | | | |
| | | © Deduction Frequency ○ Annual Frequency | | | | |
| | | | | | | |
| Election Entry | Entered 0 of 0 | Show Plans | | | | |
| Validate/Finalize | Errors () | Show Errors Finalize/Apply Defaults | | | | |
| Confirmation Statement | Run Date | | | | | |
| Reprocess | Process Indicator N | Normal Processing | | | | |
| Save Return to Search | Notify | - | | | | |

Note: The **Pending Activities** field displays a "0" as there are no Benefit Events for this employee that are open for processing.

4. Click the **Event Status Update** button.



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

| BenAdmin Event \$ | Status Update | × |
|---|---|---------|
| Update Event Status | | Help |
| Empl ID | Ben Record 0 | |
| Event Status Update ⑦ | Q 4 4 1 of 1 🗸 🕨 | |
| Schedule ID EM00 Event Date 10/25/2022 Event ID 1 Event Class HIR Initial Enrollment Event Priority 100 Benefit Program SAL Process Status Finalized - Enrolled Action Source Job Data Change | Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults Print Option Print Both Forms Process Normal Processing Kevent Status Closed to Processing | |
| OK Cancel Apply | | Refresh |

- 5. Review the Benefit Event information to ensure that the correct Benefit Event is displayed. Use the navigation arrows or dropdown button as needed to navigate to the applicable Benefit Event.
- 6. Click the **Process** dropdown button and select "Re-Enter".
- 7. Click the Event Status dropdown button and select "Open for Processing".



| BenAdmin Event Status Update | | |
|--|--|--|
| | Help | |
| Update Event Status | | |
| Empl ID | Ben Record 0 | |
| Event Status Update ③ | Q 4 4 1 of 1 v > > | |
| Schedule ID EM00 | Address Eligibility Changed MultiJob Indicator Changed | |
| Event Date 10/25/2022 | Job Eligibility Changed | |
| Event ID 1 | Event Out of Sequence | |
| Event Class HIR Initial Enrollment | Finalize/Apply Defaults | |
| Event Priority 100 | | |
| Benefit Program SAL | Option Print Both Forms | |
| Process Status Finalized - Enrolled *F | Process Re-Enter | |
| Action Source Job Data Change *Event | t Status Open for Processing | |
| OK Cancel Apply | Refresh | |
| | | |
| | | |
| | | |
| | | |

8. Click the **OK** button.

The **On-Demand Event Maintenance** page redisplays with the applicable Benefit Event.

| Cardinal Homepage | On-Demand Event Maintenance | | Â | a | | : 0 |
|---------------------------|--|------------|--------|---------|---------|------------|
| On-Demand Event Maintenan | ce | New Window | v He | elp I | 'erson: | alize Page |
| | Person ID Ben Record 0 | | | | | |
| Activity Date | Source Empl Record () | | | | | |
| Schedule/Prepare Activity | Pending Activities 0 Show Activities Action | | | | | |
| 6 | 10/25/2022 Status Finalized - Enrolled Class HIR Event Status Update | | | | | |
| Prepare Options | Event Status Open for Processing | | | | | |
| Enrollment Statement | Run Date Frequency Deduction Frequency Annual Frequency | | | | | |
| Election Entry | Intered 4 of 5 Show Plans | | | | | |
| Validate/Finalize | Errors 0 Show Errors | | | | | |
| Confirmation Statement | Run Date | | | | | |
| Reprocess | Process Indicator R Q | | | | | |
| Save Return to Search N | veofiy | | | | | |

Note: The **Status** field still displays "Finalized – Enrolled". The **Event Status** field now displays as "Open for Processing". The **Process Indicator** field displays an "R" for Re-Enter. Notice that the **Election Entry** button is disabled.

9. Click the **Reprocess** button.



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



10. Click the **OK** button.

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

| Cardinal Homepage | On-Demand Event Maintenance | | â | Q, | | ۲ |
|--|--|------------|------|-------|----------|------|
| On-Demand Event Maintenan | Person ID Ben Record D | New Window | Help |) Per | sonalize | Page |
| Activity Date | Source Empl Record 0 | | | | | |
| Schedule/Prepare Activity | Pending Activities () Show Activities Action | | | | | |
| Event ID 1 Event Date Prepare Options | 10/25/2022 Status Re-Enter Class HIR Event Status Update Event Status Open for Processing | | | | | |
| Enrollment Statement | Run Date Frequency CAnnual Frequency | | | | | |
| Election Entry Validate/Finalize | Entered 4 of 5 Show Plans Errors 0 Show Errors □ Finalize/Apply Defaults | | | | | |
| Confirmation Statement | Run Date | | | | | |
| Reprocess | Process Indicator N Q | | | | | |
| Save Return to Search | Notify | | | | | |

Note: The **Status** field now displays "Re-Enter". The **Event Status** field still displays as "Open for Processing". The **Process Indicator** field now displays an "N" for Normal Processing. Notice that the **Election Entry** button is enabled.

The Benefit Event can now be completed or updated as needed and then validated and finalized again.