

Reviewing Employee Benefits Information Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to review the various elements of Benefits information for an employee. This Job Aid contains sections detailing the processes for reviewing each of the following pages:

- **Health Benefits** page: Used to review the current, historical, and future dated health benefit enrollments for an employee
- **Simple Benefits** page: Used to review the current, historical, and future dated premium reward and flex spending admin fee enrollments for an employee
- Life and AD/D Benefits page: Used to review the imputed life enrollment for an employee
- **Spending Accounts** page: Used to review the current, historical, and future dated Flex Spending Medical and/or Flex Spending Dependent Care enrollments for an employee
- **Savings Plan** page: Used to review the current, historical, and future dated Savings Plan enrollments for an employee
- **Retirement Plans** page: Used to review the current, historical, and future dated Retirement Plan enrollments for an employee
- **Current Benefits Summary** page: Used to review all of the current enrollments for an employee

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

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Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (<u>Section 1</u> , after Step 1, <u>Section 2</u> , after Step 1; <u>Section 3</u> , after Step 1; <u>Section 4</u> , after Step 1; <u>Section 5</u> , after Step 1; <u>Section 6</u> , after Step 1; <u>Section 7</u> , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



Reviewing the Health Benefits Page

The **Health Benefits** page is used to review the health plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The enrolled dependents are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Health Benefits page using the following path:
	NavBar > Menu > Benefits > Enroll in Benefits > Health Benefits
The Heal	h Benefits Find an Existing Value page displays.
(Cardinal Homepage Health Benefits
He	alth Benefits
F	ind an Existing Value
Ĕ	Search Criteria ter any information you have and click Search. Leave fields blank for a list of all values.
	Precent Searches Choose from recent searches
	Empl ID begins with v
	Benefit Record Number = 🗸
	Name begins with
	Last Name begins with V
	Business Unit begins with V
	Department Set ID begins with Q
	Department begins with V
	Organizational Relationship = v
	Alternate Character Name begins with V
	A Show fewer options One of the History One of the History One of the History
	Search Clear
	For more information partaining to the Cordinal HCM Search pages, refer to the Job Aid title
fi	"Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal
	Website in Job Aids under Learning .



Step	Action
2.	Enter the employee's Employee ID in the Empl ID field.
	Note : Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
	Empl ID begins with V
3.	Click the Include History checkbox.
	Case Sensitive Include History Correct History
4.	Click the Search button.
	Clear
The Heal t	h Benefits page displays.
Çardi	Nal Homepage Health Benefits 🙃 Q 🔅 🗭 New Window Help Personalize Page
Healt	Employee ID Benefit Record Number 0
Plan	Type
	Plan Type 10 Medical
Cov	
Cov	Toolerage begin use UsUTIZUZ3 EE o Tueduction Begin use UsUTIZUZ3 EE o
	e Elect O Waive O Terminate 🍫 "Election Date 12/06/2023
	Benefit Program SalBenPrgm Benefit Plan ACC0 Q COVA Care + Prev Dental Option Code 25 Coverage Code 1 Q Single Health Provider ID Previously Seen Employee Status Active
	1-1 of 1 ~
*ID	Name Relationship to Employee Health Provider ID Prev Seen Covered Person Type Age Limit Fig
5.	Review the information as needed.



Reviewing the Simple Benefits Page

The **Simple Benefits** page is used to review the Premium Reward and Flex Spending Admin Fee enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Simple Benefits page using the following path:
	NavBar > Menu > Benefits > Enroll in Benefits > Simple Benefits
The Simp	ole Benefits Find an Existing Value page displays.
(- Cardinal Homepage Simple Benefit
Si	mple Benefit
F	ind an Existing Value
× Ei	Search Criteria tter any information you have and click Search. Leave fields blank for a list of all values.
	Precent Searches Choose from recent searches
	Empl ID begins with V
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	Organizational Relationship =
	Alternate Character Name begins with 🗸
	A Show fewer options Correct History Correct History
A	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal
J	Website in Job Aids under Learning .



Step	Action	
2.	Enter the employee's Employee ID in the Empl ID for Note : Users can also search for the applicable employee ID is not known.	field. bloyee using the various Name fields if the
3.	Click the Include History checkbox.	
	🗌 Case Sensitive 🗖 Include History	Correct History
4.	Click the Search button.	
	Search Clear	
The Simp	le Benefits page displays.	
Çara	inal Homepage Simple Benefit DeBenefit Record Number 0	ি Q : ⊘ New Window Help Personalize Page
Plar	Type Q I II I II II View All	
G	Plan Type AY Health Premium Reward	
	Coverage Begin Date 08/01/2023 🛗 🐢 *Deduction Begin Date 08/01/2023 🛗 🐢 🕇 🗖	
Cc	verage Election ⊙ Elect ® Waive ○ Terminate [©] *Election Date 12/06/2023 ∰	
	Benefit Program SAL Salaried Employee Benefit Pgm Benefit Plan Q	
Sa	ve Return to Search Notify Refresh Update/Display Include History	
5.	Click the View All link in order to see all of the enroneeded.	ollments and review the information as
	Simple Benefits	
	Employee	ID Benefit Record Number 0
	Plan Type	Q I of 2 View All



Reviewing the Life and AD/D Benefits Page

The **Life and AD/D** page is used to review the Imputed Life Insurance Income Plan enrollment for an employee. The assigned Beneficiary(ies) are also available for review on this page as applicable.

Step	Action
1.	Navigate to the Life and AD/D Benefits page using the following path:
	NavBar > Menu > Benefits > Enroll in Benefits > Life and AD/D Benefits

The Life and AD/D Benefits Find an Existing Value page displays.

← Cardinal Homepage Life and AD/D Benefits
Life and AD/D Benefits
Find an Existing Value
✓ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.
Precent Searches Choose from recent searches
Empl ID begins with v
Benefit Record Number =
Name begins with V
Last Name begins with 🗸
Business Unit begins with V
Department Set ID begins with Q Q
Department begins with v Q
Organizational Relationship = v
Alternate Character Name begins with
Snow tewer options Case Sensitive Include History Correct History
Search Clear
For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
Enter the employee's Employee ID in the Empl ID field.
Note : Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
Empl ID begins with ~



Benefits Job Aid

Step	Action
3.	Click the Include History checkbox.
	Case Sensitive Include History Correct History
4.	Click the Search button.
The Life	and AD/D Benefits page displays.

Çardinal Homepage	Life and AD/D Benefits	New Window Help Personalize Page
Life and AD/D Benefits		
Employee	ID Benefit Record Number 0	
Plan Type		View All
Plan Type 23 Imputed Life	•	-
Coverage		View All
*Coverage Begin Date 07/10/2023	*Deduction Begin Date 07/10/2023 📰 🖕 🕇	
Coverage Election		
® Elect ○ Waive ○ Terminate Ф	*Election Date 12/06/2023	
Benefit Program SalBenPrgm Benefit Plan IMPLIF Q Imputed Life in Option Code 1	nsurance Income	
Coverage Options		
Flat Amount 📃 👳		
		1.1
Review the information as	needed.	



Reviewing the Spending Accounts Page

The **Spending Accounts** page is used to review the Flex Spending Medical and Flex Spending Dependent Care plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. Remember, employees must elect Flex Spending Accounts each Plan Year as desired.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Spending Accounts page using the following path:
	NavBar > Menu > Benefits > Enroll in Benefits > Spending Accounts

The FSA Benefits Find an Existing Value page displays.

FSA Benefits				
Find an Existing Va	alue			
✓ Search Criteria				
Enter any information you h	ave and click Search. Leave fields blank for a list o	of all values.		
Recent Searches	Choose from recent searches	V 🛛 Saved Searches	Choose from saved searches	~ //
	Empl ID begins with 🗸			
Benefi	t Record Number = 🗸			
	Name basissuith u			
	Last Name begins with 🗸			
	Business Unit begins with 🗸			
D	epartment Set ID begins with 🗸	٩		
	Department begins with V	Q		
Organizatio	onal Relationship 🛛 = 🗸	~		
Alternate	Character Name begins with 🗸			
	∧ Show fewer options			
	Case Sensitive Conclude History Co	correct History		
	Search			

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.



Employee Contribution Override

0.00

Carryover Amount

Carryforward

Monthly

BN361_Reviewing Employee Benefits Information

Step	Action
2.	Enter the employee's Employee ID in the Empl ID field.
	Note : Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
	Empl ID begins with ~
3.	Click the Include History checkbox.
	Case Sensitive Include History Correct History
4.	Click the Search button.
	Clear
The Sp	ending Accounts page displays.
	Cardinal Homepage Spending Accounts O C New Window Help Personalize Page
	Spending Accounts
	Plan Type Q I I d d I of 2 v I Mew All
	Plan Type 60 Flex Spending Medical
	*Coverage Begin Date 08/01/2023 1000 *Deduction Begin Date 08/01/2023 * * Coverage Election *Elect O Waive O Terminate * * *
	Benefit Program <u>Salaried Employee</u> Benefit Pgm Benefit Plan FLXMED Q Medical Flex Spending Account Option Code 1
	Contribution Level Account Information Annual Pledge \$1000.00 Credit Rollover Included in Pledge \$0.00 Contribution SYTD \$0.00

	Save Return to Search Notify	Refresh	Update	e/Display Include History	
5.	Click the View needed.	All link in order to	o see all of the	enrollments	and review the information as
	Spending Accoun	ts Employee		ID	Benefit Record Number 0
	Plan Type				Q View All
		Plan Type 60	Flex Spending Medical		+-

Employee Status Active



Reviewing the Savings Plans Page

The **Savings Plans** page is used to review the Savings Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The assigned Beneficiary(ies) are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action						
1.	Navigate to the Savings Plans page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Savings Plans						
The Savi	ngs Plans Find an Existing Value page displays.						
	Cardinal Homepage Savings Plans						
s	avings Plans						
F	find an Existing Value						
	 Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. 						
	Precent Searches Choose from recent searches						
	Empl ID begins with V						
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	Name begins with						
	Last Name begins with						
	Business Unit begins with						
	Department Set ID begins with V Q						
	Department begins with Q						
	Organizational Relationship = v						
	Alternate Character Name begins with 🗸						
	Show fewer options						
	Case Sensitive Correct History						
	Search						

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.



Step	Action
2.	Enter the employee's Employee ID in the Empl ID field. Note : Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
	Empl ID begins with V
3.	Click the Include History checkbox.
	Case Sensitive Include History Correct History
4.	Click the Search button.
	Search
The Savi	ngs Plans page displays.
C Sav	dimit lormage Strutge Fridis Inge Flans ably Compares and able Plan Type 46 4030 b Coverage Englin Date 0 i i i i i i i i i i i i i i i i i i i
5.	Click the View All link in order to see all of the enrollments and review the information as needed. Savings Plans Employee ID Benefit Record Number 0
	Plan Type Q I
	Plan Type 46 403(b)



Reviewing the Retirement Plans Page

The **Retirement Plans** page is used to review the Retirement Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

ер	Action							
1.	Navigate to the Retirement Plans page using the following path:							
	NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans							
Reti	ement Plans Find an Existing Value page displays.							
	- Cardinal Homepage Retirement Plans							
R	etirement Plans							
F	ind an Existing Value							
E	Search Criteria nter any information you have and click Search. Leave fields blank for a list of all values.							
	Precent Searches Choose from recent searches							
	Empl ID begins with V							
	Benefit Record Number = -							
	Name begins with V							
	Last Name begins with V							
	Business Unit begins with V							
	Department Set ID begins with V Q							
	Department begins with v Q							
	Organizational Relationship = v							
	Alternate Character Name begins with v							
	Case Sensitive Include History Correct History							
	Search Clear							



Step	Action
2.	Enter the employee's Employee ID in the Empl ID field. Note : Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
	Empl ID begins with V
3.	Click the Include History checkbox.
	Case Sensitive Include History Correct History
4.	Click the Search button.
	Clear
The Retir	ement Plans page displays.
Çard Retir	Inal Homepage Retirement Plans Q : 0 New Window Help Personalize Page ement Plans Employee ID Benefit Record Number 0
Çard Retir Plar	Retirement Plans Q : O New Window Help Personalize Page Employee ID Benefit Record Number 0 Type
Qard Retir Piar Co	Abl Homepage Retirement Plans ement Plans Employee ID Benefit Record Number 0 Type QI Id ID Benefit Program Salaried Employee Benefit Pgm Participation Election Benefit Program Salaried Employee Benefit Pgm Payroll Status Active Benefit Plang Payroll Status Active Benefit Plange Benefit Pgm Payroll Status Payroll Status Active Benefit Plange Benefit Plange Payroll Status Active Benefit Plange Benefit Plange Payroll Status Active Benefit Plange Benefit Plange Election Date Payroll Status Payroll Status Active Benefit Plange Election Planticipation Election </th
Card Retir Plar Co	Nat Homepage Retirement Plans Employee ID Benefit Record Number 0 Type Q I I IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII
Gard Retir Plar Co Sav	Inthempage Retirement Plans Employee ID Benefit Record Number 0 Type Plan Type 70 Employee Retirement DB **reage **reage **Deduction Begin Date **Detuction Begin Date **Detuction Begin Date <
Gard Retir Plar Co	Init Kompage Retirement Plans Employee D Benefit Record Number 0 Type Plan Type 70 Employee Retirement DB Participation Election E



Reviewing the Current Benefits Summary Page

The **Current Benefits Summary** page is used to review all of the current enrollments for an employee. Historical and future dated enrollments will not display on this page. This page can also be used to review the current deductions summary information for the employee.

Step	Action
1.	Navigate to the Current Benefits Summary page using the following path:
	NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary

The Current Benefits Summary Find an Existing Value page displays.

\leftarrow Cardinal Homepage			Current Benefits Summary	
Current Benefits Sur Find an Existing Va	mmary lue			
 Search Criteria Enter any information you have 	ave and click Search. Leave fields blank for a list of all	values.		
Precent Searches	Choose from recent searches	✓	Choose from saved searches	~ //
	Empl ID begins with			
Benefit	Record Number = Name begins with			
	Last Name begins with V			
	Business Unit begins with V			
De	epartment Set ID begins with V	Q		
	Department begins with V	Q		
Organizatio	nal Relationship 🛛 = 🗸	~		
Alternate	Character Name begins with V			
	∧ Show fewer options□ Case Sensitive			
	Search Clear			
For more ir "Overview Website in	nformation pertaining to th of the Cardinal HCM Sear Job Aids under Learning	e Cardinal HCM S ch Pages". This . 3 .	Search pages, refer to t Job Aid is located on th	he Job Aid titled e Cardinal
Enter the e	mployee's Employee ID ir	n the Empl ID field	d.	
Note: User	s can also search for the a	applicable employ	vee using the various N	ame fields if the
Employee				



Step	Action
3.	Click the Search button.
	Clear

The **Current Benefits Summary** page displays with the **Benefits Enrollment Summary** tab displayed by default.

Çar	rdinal Homepage				Current Be	nefits Summary	ଳ <u>୧ : ଡ</u>
E	Benefit Enrollment Summ	Benefit Deduc	tion Summary				New Window Help Personalize Page
		Employee		D	B	enefit Record Number 0	
	Benefits Syst Benefit Progr Benefits Sta	tem Benefits Administra ram SAL Salaried Em tus Active	ation nployee Benefit Pgm				
Plar	n Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin	
Med	dical	Elect	ACC0	COVA Basic	Single	08/01/2023	
Imp	uted Life	Elect	IMPLIF	IMP LIF	Salary X 2	07/10/2023	
Flex	Spending Medical	Elect	FLXMED	Med FSA	\$1000 Pledge	08/01/2023	
Flex	Spending bendent Care	Waive			Waived	08/01/2023	
Hea Rev	alth Premium vard	Waive			Waived	08/01/2023	
Flex Fee	c Spending Admin	Elect	FLXFEE	FSA AdmFee		08/01/2023	
Bene	Review Click th	the info	rmatior it Dedu	as nee	eded. Summary	tab.	
Benefit Enrollment Summary Benefit Deduction Summary							
		ction Su	ummar	y tab di	splays.		
en	efit Dedu						
en	efit Dedu				Current B	enefits Summary	<u>ଲେ ୯ :</u> ଡ

Ben	efit Enrollment Summary Benefit Deduction Summary				
	Employee ID Benefit Record Number 0				
	Primary Empirectora U				
	Peyroll Status - Active				
Retur	nts Search				
Benefit E	nrollment Summary Benefit Deduction Summary				
6.	Review the information as needed.				
	Data will only be reflected on this tab if the agency utilizes Cardinal payroll				