

Managing and Approving Dependents Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator to generate the Dependent Waiting Approval Benefits Eligibility Audit Report. This report should be generated and reviewed on a regular basis in order to monitor those dependents that are currently in an "Unapproved Dependent" status. Unapproved dependents are not covered under the employee's selected plan coverage and must be updated to a status of "Approved Dependent" once the applicable supporting documentation is provided by the employee. Use this report to review these dependents pending approval and to follow up with the employee to ensure that the supporting documentation is provided timeframe.

This Job Aid also 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
- Dependents need to be updated from "Unapproved Dependent" to "Approved Dependent" when the required supporting documentation is provided by the employee

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 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</u> <u>2</u> , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



Running the Dependent Waiting Approval Benefits Eligibility Audit Report

Step	Action
1.	Navigate to the Benefit Eligibility Audits page using the following navigation path:
	NavBar > Menu > Benefits > Reports > Audits > Benefit Eligibility Audits

The Benefit Eligibility Audits Search page displays.

← Car	rdinal Homepage				Benefit Eligibi	lity Audits	
Benefi	ït Eligibility Αι	udits					
Find a	an Existing Va	lue				+Add a New Value	
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	created a	and saved. The inst	ructions provid				
	this repo	rt is being generated	d.				
2.	Click the	Add a New Value	button.				
		Add a New Value	1				
	Ð	Add a New value]				
]				



Step	Action
The Ad	d a New Value page displays.
	Cardinal Homepage Benefit Eligibility Audits
	Benefit Eligibility Audits
	Add a New Value Q Find an Existing Value
	Run Control ID
3.	Enter a Run Control ID in the Run Control ID field based on the following guidelines:
	 The Run Control ID must be unique and should be descriptive enough to help locate for future use
	b. Up to 30 characters are allowed
	 No blank spaces can be used. However, and underscore can be used in lieu of spaces
	d. Do not use wildcard symbols (%)
	Run Control ID
	Add
4.	Click the Add button.
	Run Control ID
	Add
The Be	nefits Eligibility Audits page displays.



Step	Action
	< Cardinal Homepage Benefit Eligibility Audits
	Benefit Eligibility Audits
	Run Control ID DEP_APPROVAL_RPT Report Manager Process Monitor Run
	Process Request Parameter(s)
	Company (Leave Blank for All) ABC Q Alcoholic Beverage Control
	Dependent Walting Approval Retired, Tricare and TLC Employees Approaching 65
	Dependent of Retirees/Tricare,TLC employees Approaching 65
	Dependent Child Approaching 26 Disabled Over-Age Dependent Child
l	Serve Notify Add Update/Display
5.	Select the applicable Company using the Company Look Up icon.
	Process Request Parameter(s)
	Company (Leave Blank for All) ABC Q Alcoholic Beverage Control
6.	Click the Dependent Waiting Approval checkbox option.
	Process Request Parameter(s)
	Company (Leave Blank for All) ABC Q Alcoholic Beverage Control
	Dependent Waiting Approval
	□ Retired, Tricare and TLC Employees Approaching 65
	Dependent of Retirees/Tricare, TLC employees Approaching 65
	Dependent Child Approaching 26
	□ Disabled Over-Age Dependent Child
-7	
7.	Click the Save button.
	Save Notify
8.	Click the Run button.
	Benefit Eligibility Audits
	Run Control ID DEP_APPROVAL_RPT Report Manager Process Monitor Run



Step	Action
The Pro	ocess Scheduler Request page displays.
	Process Scheduler Request ×
	Help
	User ID V_TRN_BN36102 Run Control ID DEP_APPROVAL_RPT
	Server Name V Run Date 04/22/2024
	Recurrence Run Time 10:43:05AM Reset to Current Date/Time Time Zone Q
	Select Description Process Name Process Type Type Format Distribution
	Image: Benefit Eligibility Audits V_BN301_RPT Application Engine Web Image: PDF Distribution
	OK Cancel
9.	The Type field defaults to "Web". Update to "Email", "File", or "Printer" as desired. If "Email" is
	selected, use the Distribution link to identify the email address to send the report to.
	Process List
	Select Description Process Name Process Type 'Type 'Format Distribution
	Benefit Eligibility Audits V_BN301_RPT Application Engine Web < PDF Distribution
10.	The Format field defaults based on the report being generated. Update as needed if other
	formats are available for the report being generated.
	Process List Select Description Process Name Process Type 'Format Distribution
	Image: Second production in the second product of
	Refer to the HCM Reports Catalogs to identify the formats available for each specific HCM
	Report. The HCM Reports Catalogs are located on the Cardinal Website under Resources .
11.	Click the OK button.
	OK Cancel
The Be i	nefit Eligibility Audits page redisplays.



Step	Action	
	< Cardinal Homepage Benefit Eligibility Audits (n) ⋮ Ø	
	New Window Tilelp Personalize Plage	
	Benefit Eligibility Audits	
	Run Control ID DEP_AOPROVAL_RPT Report Manager Process Monitor Run	
	Process Request Parameter(s)	
	Company (Leave Blank for All) ABC Q Alcoholic Beverage Control	
	Dependent Walting Approval	
	Retired, Tricare and TLC Employees Approaching 65	
	Dependent of Retirees/Tricare,TLC employees Approaching 65 Dependent Child Approaching 26	
	Displied Over-Age Dependent Child	
	Sere Notry Add Update/Display	
12.	Click the Process Monitor link.	
	Benefit Eligibility Audits	
	Run Control ID DEP_APPROVAL_RPT Report Manager Process Monitor Run	
The Pro	ocess Monitor page displays.	
	< Benefit Eligibility Audits Process Monitor 🟠 : Ø	
	New Window Help Personalize Page - Process List	
	View Process Request For	
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	2520300 Application Engine V_BN301_RPT V_TRN_EN38102 04/22/2/24 10 /43 05AM EDT Success Pested Datable	
	Go back to Benefit Eligibility Audits	
	Sove Netfly	
13.	Click the Refresh button periodically until the Run Status is "Success" and the Distribution	ution
	Status is "Posted".	



Benefits Job Aid

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3,205	04/22/2024 10:53:58.426295AM EDT
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The Dependent Waiting Approval Benefits Eligibility Audit report displays.



Step	Action
[Dependent Waling Approval
	Company Displayer D Desc And States Match Law Participant Desc Participant Displayer D Displayer D
1	Review this report to identify any dependents that are currently "Unapproved" and are pending approval when the applicable supporting documentation is received. Follow up with the employee(s) as needed to obtain the supporting documentation as dependents displayed on this report are not currently covered on the employee's selected plan.



How to Approve a Dependent

Once the employee provides the applicable supporting documentation to add the dependent(s) to their plan coverage, the applicable Benefit Event will need to be re-opened and reprocessed in order to update the dependent(s) to a status of "Approved Dependent". This Benefit Event could have been triggered by:

- A Life Event manually created by a Benefits Administrator
- A Life Event initiated by the employee through Employee Self-Service (ESS)
- An Open Enrollment Event including the addition of dependents to coverage

:	Step	Action
	1.	Navigate to the On-Demand-Event Maintenance page using the following navigation path:
		NavBar > Menu > Benefits > Managed Automated Enrollments > Events > On-Demand Event Maintenance

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

Precent Searches Ct	tenance ind click Search. Leave fields blank for a list of all values. cose from recent searches
Ind an Existing Value Search Criteria Iter any information you have Recent Searches Cr	and click Search. Leave fields blank for a list of all values.
Search Criteria ter any information you have a Recent Searches	oose from recent searches V P Saved Searches Choose from saved searches V
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^	Show fewer options
0	Case Sensitive
	Search Clear
	nformation pertaining to the Cardinal HCM Search pages, refer to the Job Aid
	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 applicable employee's Employee ID in the Empl ID field.									
	Empl ID begins with ~									
i	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.									
	Clear									
The On-Demand Event Maintenance page displays for the applicable employee.										
Castinua Homospage On-Demand Event Maintenance On-Demand Event Maintenance Person th Ben Record 0 Activity Date Source Empt Record 0 Status Class Event Status Event D Event Date Status Class Event D Event Status Event Status Event Status Event Status Event Status Contendation Status Event Status Event Status Event Status Ev										
A	The Pending Activities field displays a "0" as there are no Benefit Events for this employee that are open for processing.									
	Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 0 Event Date Status Class Event Status Update Prepare Options Event Status Event Status Event Status									
4.	Click the Event Status Update button.									
	Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action									
	Event ID 0 Event Date Status Class Event Status Update Prepare Options Event Status									



Step	Action				
The Upda	ate Event Status pa	age displays in a pop-u	p window.		
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	Undet	e Event Status		Help	
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		Schedule ID EM00 Event Date 05/01/2024 Event Disconnected Event ID 2	Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence		
		Event Class MAR Marriage Event Priority 420	G Finalize/Apply Defaults		
		Benefit Program SAL Process Status Finalized - Enrolled	Print Option Print Confirmation Forms Only Process Normal Processing	• •	
		Action Source Manual Event	*Event Status Closed to Processing	~	
	ок	Schedule ID EM00 Event Date 07/10/2023 Event Disconnected Event ID 1 Event Product 10 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 Finalizei/Apply Defaults Print Option Print Both Forms *Process Normal Processing *Event Status Closed to Processing	▼ ▼ Refresh	
	Most of the time, y In this example, it	s listed and identify the you are looking for a Ne is a MAR (Marriage) Be ne event to approve the	ew Hire, recent life enefit Event. Onc	e event, or (Open Enrollment event.
i	Event Status Update ⑦		Q	I I∢ ∢ 1 of	f2 v)
	Schedule ID Event Date	EM00 05/01/2024 Event Disconnected	_	dress Eligibility Cha ItiJob Indicator Cha	-
	Event ID	2	□ Job	b Eligibility Changed	1
	Event Class	MAR Marriage		ent Out of Sequence	3
	Event Priority	420	□ Fin	alize/Apply Defaults	;
	Benefit Program	SAL	Print Option Print	t Confirmation Forms	Only ~
	Process Status	Finalized - Enrolled	*Process Norn	mal Processing	~
	Action Source	Manual Event	*Event Status Clos	sed to Processing	~
5.	Click the Process	dropdown button and	select "Re-Enter".		
	Event Status Update ⑦		Q		of 2 🗸 🕨 🕨
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Step	Action
6.	Click the Event Status dropdown button and select "Open for Processing".
	Event Status Update ⑦ Q I Id d 1 of 2 v V
	Schedule ID EM00 □ Address Eligibility Changed □ MultiJob Indicator Changed □ MultiJob Indicator Changed □ Job Eligibility Changed □ Print Out of Sequence □ Finalize/Apply Defaults □ Frinalize/Apply Defaults ▼Process Status Finalized - Enrolled *Process ▼Process Inter ▲Action Source Manual Event **Event Status Open for Processing ▼Processing ▼Processing ■ ■
7.	Click the OK button at the bottom of the page.
	OK Cancel Apply
The On-D	emand Event Maintenance page redisplays.
Cardinal Homepage	Person ID Ben Record Source Empl Record Source Empl Record art Activity Pending Activities Pending Activities Stow Activities Action Event Date Event Status Open for Processing Entered of Stow Flams Frequency Deduction Frequency Defunction Defunction



Step	Action
	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.
	On-Demand Event Maintenance
	Person ID Ben Record 0
	Activity Date Source Empl Record 0
	Schedule/Prepare Activity Pending Activities O Show Activities Action
i	Event ID 2 Event Date 05/01/2024 Prepare Options Event Status Open for Description
	Enrollment Statement Bus Date
	Run Date Frequency Orden Deduction Frequency Orden Deduction 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 R Q Re-Enter
	Save Return to Search Notify
8.	Click the Reprocess button.
	Reprocess Process Indicator R Q
	Save Return to Search Notify
11.	A Confirmation message displays in a pop-up window once the automated program completes.
	Click the OK button to close the message.
	OK Cancel



Step	Action	
The On-D	emand Event Maintenance page redisplays.	
< Car	dinal Homepage On-Demand Event Maintenance 💮 : Ø	
On-De	emand Event Maintenance Ben Record 0	
Act	tivity Date Source Empl Record 0 Schedule Prepare Activity Pending Activities 0 Show Activities Action	
Ever	nt ID 2 Event Date 05/01/2024 Status Re-Enter Class MAR Event Status Update	
	Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency	
	Election Entry Entered of Stow Plant Election Entry	
	Validate/Finalize Errors 0 Show Errors OFinalize/Apply Defaults	
	Confirmation Statement Run Date	
Save	Normal Processing	
i	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.	
	Normal Processing	
12.	Click the Election Entry button.	



Step	Action									
The BenA	dmin Data Entry pa	ge displays with	the Option Elec	tion tab displayed l	by default.					
		Be	nAdmin Data Entry		×					
	Event / Participant Selection Option	Election Dependents / Benefit	ciaries		Help					
	Sched ID EM00 Empl Event Data 05/01/2024 Marriage	D	Ben Record Excess Credit Rollover To F	0 Event ID 2 Forfeit Excess Credits						
	▼ Available Plans and Options ⑦ Q 1 of 1 ∨									
	Plan Type 10 : Medical									
	Option Code 28 Q	COVA Care + Prev Dental (ACC0) (Fa	imily)	\$						
	Health Provider ID		Previously Seen Specia	al Requirements						
	Dependents/Beneficiaries									
	"ID Name	Relationship to Health Pro Employee ID	vider Previously Covered Seen Person Type	Age Limit Flag						
	01 Q Ginger Snaps	Spouse	Spouse	-						
	02 Q Finger Snaps	Stepchild	Child	•						
	+_				• 4					
13.	Click the Dependen			eneficiaries						
The Depe	ndents/Beneficiarie	s tab displays.								
		Ben	Admin Data Entry		×					
	Event / Participant Selection Op	ion Election Dependents / E	Beneficiaries		Help A					
	Schedule ID Employee ID Event ID 2 Forfeit Excess Credit									
	Dependent/Beneficiaries Currently Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth						
	Snaps,Ginger	Spouse	Unapproved Dependent	04/01/1999						
	Snaps,Finger	Stepchild	Unapproved Dependent	04/12/2019						
	Chanoe/Add Decendent Data									
	Elections Requiring Supplemental 10 Medical		Enroll Depender	nts						
	CK Cancel Apply Event / Participant Selection I Option El	ection Dependents / Beneficiari	ies		Refresh					



Step	Action									
		ents in the Dependent/ s currently have a status		ntly on Record table. Note endent".						
	Dependent/Beneficiaries Currently on Record									
i	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth						
	Snaps,Ginger	Spouse	Unapproved Dependent	04/01/1999						
	Snaps,Finger Stepchild Unapproved Dependent 04/12/2019									
	Change/Add Dependent Data									
14.	Click the Change/A	Add Dependent Data lir	nk.							
	Dependent/Beneficiaries C	urrently on Record								
	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth						
	Snaps, Ginger	Spouse	Unapproved Dependent	04/01/1999						
	Snaps,Finger	Stepchild	Unapproved Dependent	04/12/2019						
	Change/Add Dependent Data									
The Depe	endent/Beneficiary page displays.									
_	Dependent/Beneficiary ×									
	Name Address Personal Profile									
	Person ID									
	Dependent/Beneficiaries									
	*Dependent/Beneficiary ID 01									
	Name History Q I I I I I I I View All									
	*Effective D	ate 05/01/2024		+ -						
	*Format T	vpe English 🗸								
	Display Na	me Ginger Snaps	Edit Name							
	OK Cancel App	v								
	Name Address Personal Profile			U T						
L										
15.	Click the Personal	Profile tab.								
	Name Addr	ess Personal Profile								



Step	Action
The Per	sonal Profile tab displays.
	Dependent/Beneficiary ×
	Name Address Personal Profile
	Sugar Snaps Person ID
	Personal Profile Q I d d I of 2 v View All
	Dependent/Beneficiary ID 01 Ginger Snaps
	*Date of Birth 04/01/1999
	Birth Country Q Birth State Q Date of Death Image: Control of Contr
	Medicare Entitled Date Riders/Orders
	Personal History Q I d d I of 1 v b I View All
	*Effective Date 05/01/2024
	*Relationship to Employee Spouse ~
	*Dependent Beneficiary Type Unapproved Dependent
	*Gender V
	*Marital Status Married As of 04/13/2024
ĺ	Ensure that you are viewing the applicable dependent.
16.	Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent"
	Name Address Personal Profile
	Sugar Snaps Person ID
	Personal Profile Q I d 1 of 2 v View All
	Dependent/Beneficiary ID 01 Ginger Snaps
	*Date of Birth 04/01/1999
	Birth Country Q Birth State Q Date of Death C C C C C C C C C C C C C C C C C C C
	Medicare Entitled Date Riders/Orders
	Personal History Q I I I of 1 ~ > > I View All
	*Effective Date 05/01/2024
	*Relationship to Employee Spouse ~ *Dependent Beneficiary Type Approved Dependent ~
	"Gender Female ~
	*Marital Status Married As of 04/13/2024



Step	Action	
17.	Scroll down to the bottom of the page.	
The botto	om of the Dependent/Beneficiary page display	5.
	Date of Death IEE Medicare Entitled Date IEE Personal History Q "Effective Date 05/01/2024 "Relationship to Employee Spouse "Dependent Beneficiary Type Approved Dependent "Gender Female	ceauon I State Q Riders/Orders exist Riders/Orders 4
18.	Repeat these steps to update the status to "A dependents as needed and then click the OK	
	OK Cancel Apply Name Address Personal Profile	
The Depe	endents / Beneficiaries tab redisplays	
	BenAdmin Data Entr	y × Help ^
	Event / Participant Selection Option Election Dependents / Beneficiaries Schedule ID EM00 Employee ID EM00 Event ID 2 Event Data 05/0 Benefit Record 0 Excess Credit Rollover To Forfettion	
	Dependent/Beneficiaries Currently on Record Name Relationship to Employee Dependent Beneficiaries	ary Type Date of Birth
	Snaps,Ginger Spouse Approved Depender	
	Snaps,Finger Stepchild Approved Depender	t 04/12/2019
	Change/Add Dependent Data	
		roll Dependents
	OK Cancel Apply Event / Participant Selection Option Election Dependents / Beneficiaries	Refresh



	Once all de Dependen							-	•			
	Event / Participa	ant Selection	Option El	lection	Dependents	s / Benef	iciaries					
ne Optic	on Election	tab disp	olays.									
					BenAdmi	in Data Entr	1			×]	
		Event / Participant S	election Option Elect	ction Dependents	/ Beneficiaries					Help		
		Sched ID Event Data	EM00 Empl IE 05/01/2024 Marriage	0		Excess Credi	Ben Record 0 t Rollover To Forfeit	Event ID 2 t Excess Credits				
		 Available Plans 	and Options ⑦					Q	I 1 of 1 v			
		Plan Type 10 : Med	ion Code 28 Q					¢				
			lealth Provider ID	COVA Care + Prev Der		ously Seen						
		Dependents/Be					Special Re	quirements				
			nroll All									
		Dependents/Bo		Relationship to	Health Provider	Province by	Countral					
		"ID	Name	Employee	ID	Previously Seen	Covered Person Type	Age Limit Flag				
			Ginger Snaps Finger Snaps	Spouse		0	Spouse		-			
		+_										
		OK Car	Apply							Refresh		
		Event / Participant Selec	ction Option Election	Dependents / Beneficia	ries							
20.	Review the	e Depen	dents/E	Benefic	ciaries	table	and e	ensure that	at are	e appli	cable de	pendents are
	enrolled. (Click the	Enroll	All but	ton as	need	ed.					
	Plan Type 10 : Med	ical]
	Optio	on Code 28	۹								ф	
				Care + Prev Den	ital (ACC0) (Far	nily) DPrevious	sly Seen					
	H	ealth Provider ID					siy seen	Special R	equirement	ts		
	Dependents/Ber	eficiaries										
	Dependentalber	enoraries										2

Spouse

Child

21.

01

02

÷...

Q Ginger Snaps

Q Finger Snaps

Event / Participant Selection

Cancel

Spouse

Stepchild

Click the **OK** button at the bottom of the page.

Apply

Option Election | Dependents / Beneficiaries

-

-



Step	Action	
The On-Demand Maintenance page displays.		
< Cardinal Hom	epage On-Demand Event Maintenance බ :	
On-Demand Sugar Snaps	Event Maintenance Person ID Ben Record 0	
Activity Date	Source Empl Record 0	
Schedule	Prepare Activity Pending Activities 0 Show Activities Action	
Event ID	2 Event Date 05/01/2024 Status Enterod Class MAR Event Status Update	
	end Statement Run Defe Energiance	
	Run Date Frequency Deduction Frequency Annual Frequency	
Ele	clion Entry Entered , of , Show Plans	
Valid	ato Finalize O Show Errors O Finalize/Apply Defaults	
Confirm	dion Statement Run Date	
R	Process Indicator N Q Normal Processing	
Savo	um to Search Notify	
22. 23.	Confirm that the Status field now displays as "Entered" and the Event Status field is still "Open for Processing".	
24.	Once the process completes, a Confirmation message displays in a pop up window. Click the OK button. Process completed successfully. (3000,530)	
	OK	



Step	Action	
The On-Demand Event Maintenance page redisplays.		
Çardi	New Window Heip Personition Page	
Suga	Snage Person D Snage Person D Nity De Source Ended ADProper ACH/W Pending ACH/Lines 2 Event Date Sol 1024 3 Event Statement Event Date Sol 1024 Source Event Date Sol 1024 Source Event Statement Event Statement Event Date Sol 1024 Source Event Statement Event Statement Event Statement Event Statement Event Statement Source Frequency Event Statement Source Frequency Event Statement Source Frequency	
Sav	Confirmation Statement Run Date Reprocess Indicator N Return to Search Rotty Return to Search Rotty	
i	Confirm that the Status field now displays as "Finalized-Enrolled" and the Event Status field is now "Closed to Processing". The number of elections entered will reset back to "0 of 0".	
25.	Click the Save button. Save Return to Search Notify	