

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 within the established 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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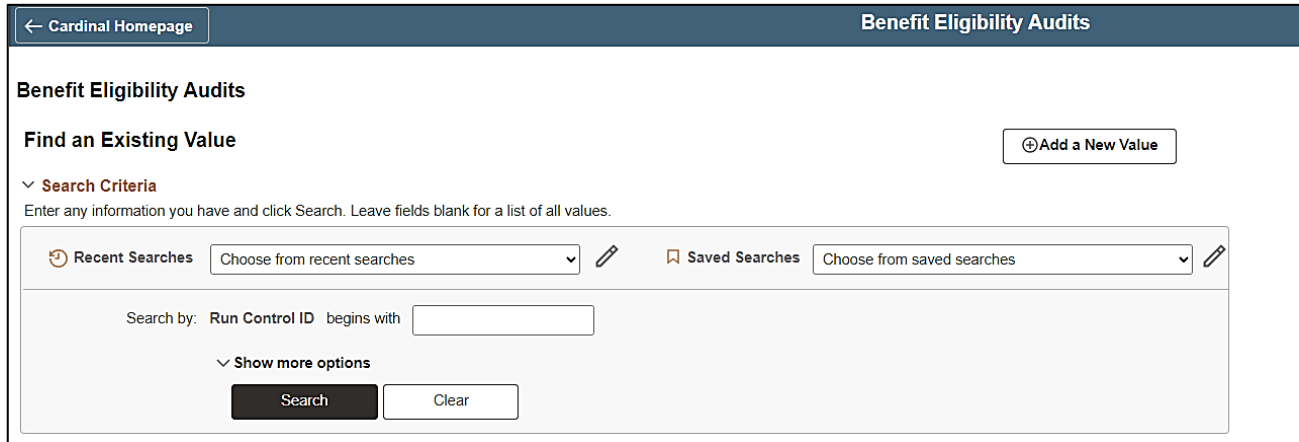
Revision History




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

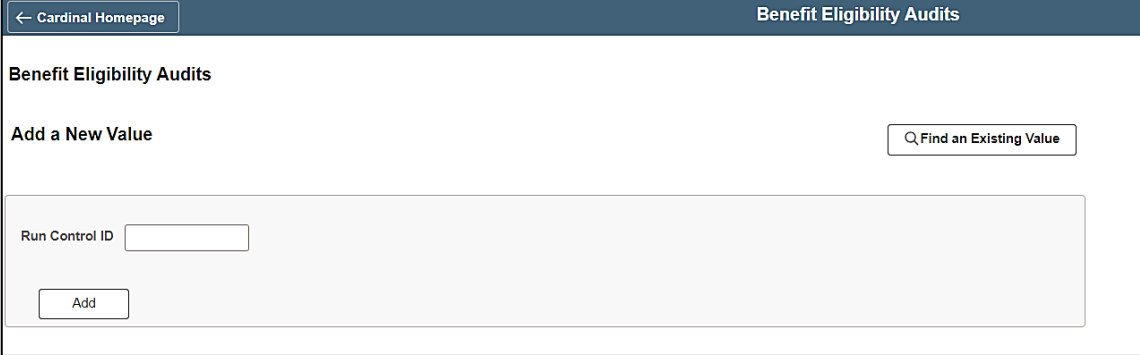


Running the Dependent Waiting Approval Benefits Eligibility Audit Report

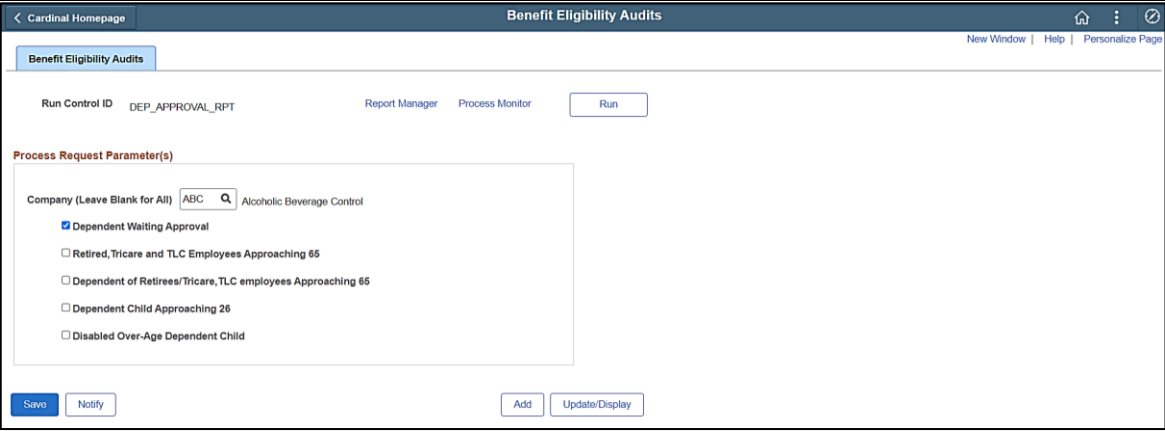




Step	Action
1.	Navigate to the Benefit Eligibility Audits page using the following navigation path: NavBar > Menu > Benefits > Reports > Audits > Benefit Eligibility Audits

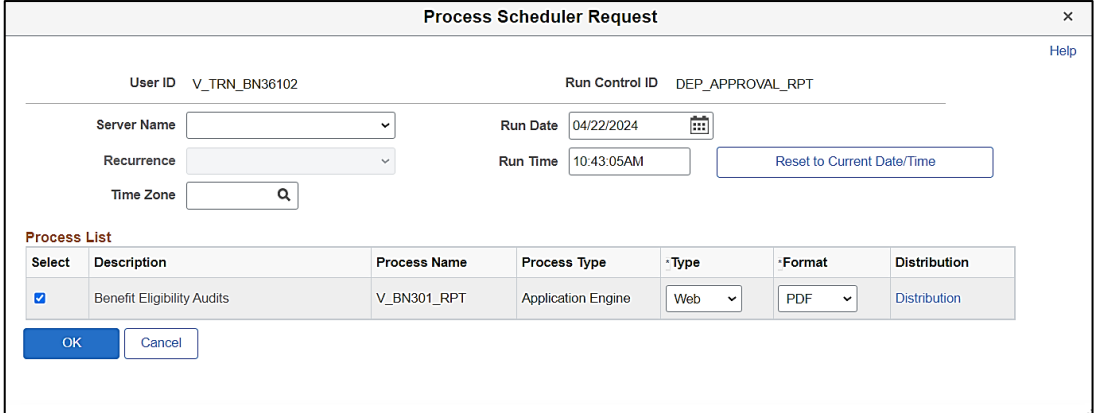




The **Benefit Eligibility Audits Search** page displays.



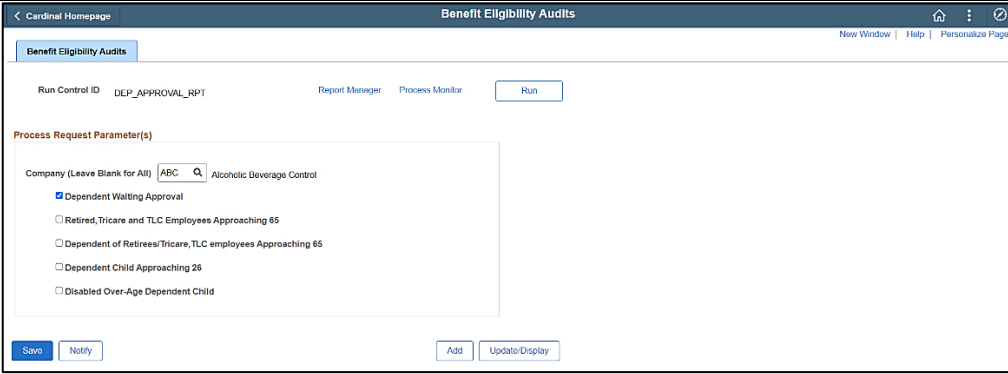
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
	If this is not the first time generating this report, always search for and use an existing Run Control ID before creating a new one. Users cannot delete Run Control IDs once they are created and saved. The instructions provided in Steps 2-4 assume that this is the first time that this report is being generated.
2.	Click the Add a New Value button. 

Step	Action
	<p>The Add a New Value page displays.</p> 
<p>3.</p>	<p>Enter a Run Control ID in the Run Control ID field based on the following guidelines:</p> <ol style="list-style-type: none"> The Run Control ID must be unique and should be descriptive enough to help locate for future use Up to 30 characters are allowed No blank spaces can be used. However, and underscore can be used in lieu of spaces Do not use wildcard symbols (%) 
<p>4.</p>	<p>Click the Add button.</p> 
	<p>The Benefits Eligibility Audits page displays.</p>

Step	Action
	
5.	<p>Select the applicable Company using the Company Look Up icon.</p> 
6.	<p>Click the Dependent Waiting Approval checkbox option.</p> 
7.	<p>Click the Save button.</p> 
8.	<p>Click the Run button.</p> 

Step	Action
	<p>The Process Scheduler Request page displays.</p> 
9.	<p>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.</p> 
10.	<p>The Format field defaults based on the report being generated. Update as needed if other formats are available for the report being generated.</p> 
	<p>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.</p>
11.	<p>Click the OK button.</p> 
<p>The Benefit Eligibility Audits page redisplay.</p>	

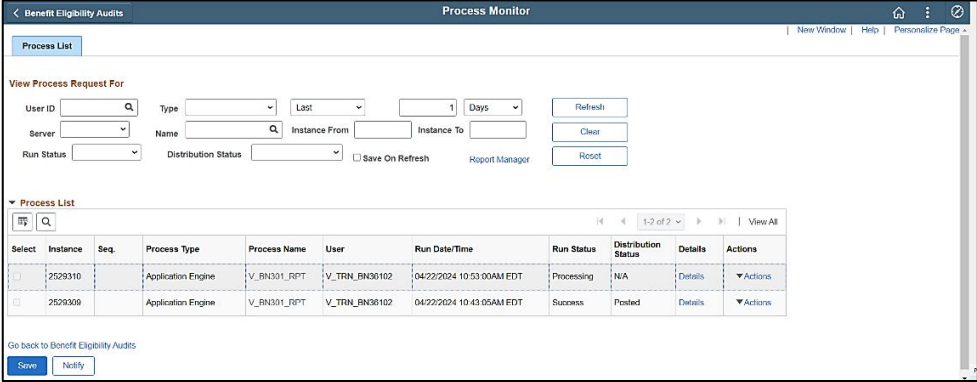
Step	Action
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The screenshot shows the 'Benefit Eligibility Audits' page. At the top, there is a 'Run Control ID' field with the value 'DEP_APPROVAL_RPT'. Below this, there are three links: 'Report Manager', 'Process Monitor', and 'Run'. The 'Process Monitor' link is highlighted with a red box. Below the links, there is a section for 'Process Request Parameter(s)' with several radio button options. At the bottom, there are 'Save', 'Notify', 'Add', and 'Update/Display' buttons.

12.	<p>Click the Process Monitor link.</p> 
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The **Process Monitor** page displays.



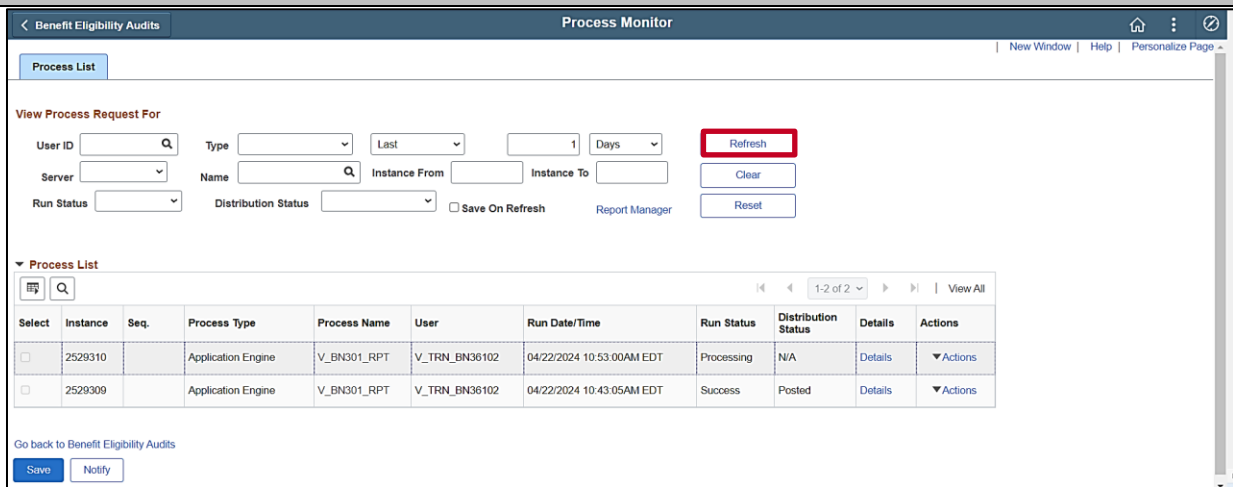
The screenshot shows the 'Process Monitor' page. It features a 'Process List' section with search filters for User ID, Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. Below the filters is a table with the following data:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	2529310		Application Engine	V_BN301_RPT	V_TRN_BN30102	04/22/2024 10:53:00AM EDT	Processing	N/A	Details	▼ Actions
<input type="checkbox"/>	2529308		Application Engine	V_BN301_RPT	V_TRN_BN30102	04/22/2024 10:43:05AM EDT	Success	Posted	Details	▼ Actions

At the bottom of the page, there are 'Save' and 'Notify' buttons. A 'Refresh' button is highlighted with a red box in the original image.

13.	<p>Click the Refresh button periodically until the Run Status is “Success” and the Distribution Status is “Posted”.</p>
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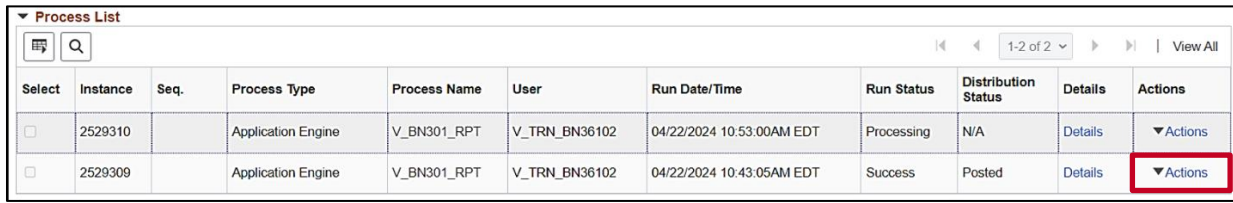
Step	Action
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The screenshot shows the 'Process Monitor' interface. At the top, there's a 'Process List' tab. Below it, there are search filters for 'View Process Request For' including User ID, Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. A 'Refresh' button is highlighted with a red box. Below the filters is a table with the following data:

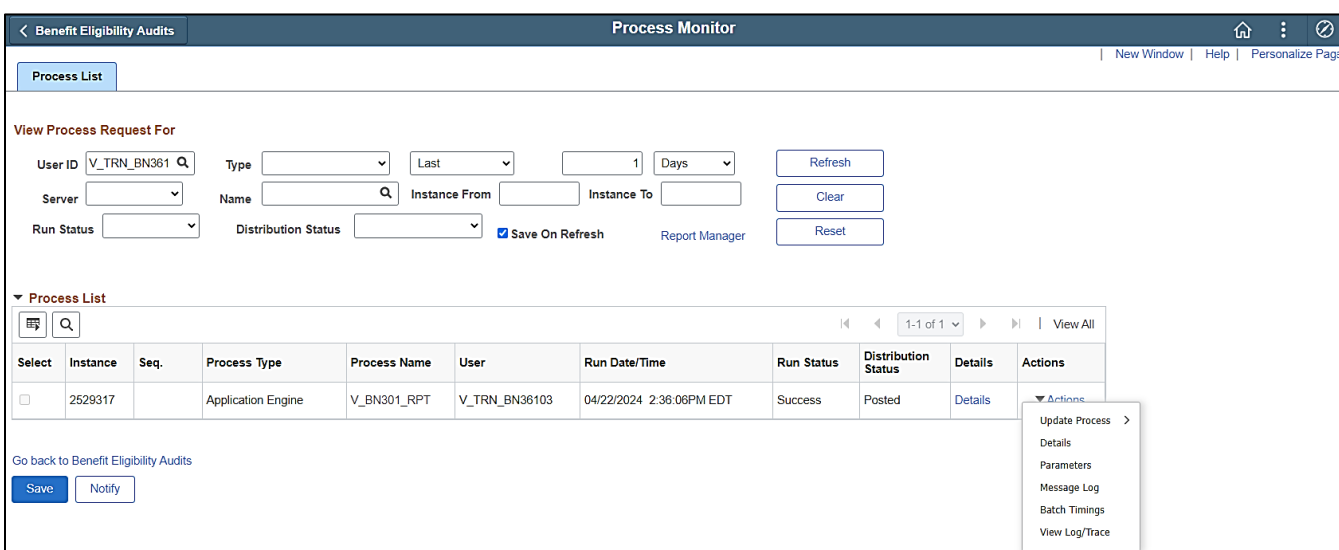
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions
<input type="checkbox"/>	2529310		Application Engine	V_BN301_RPT	V_TRN_BN36102	04/22/2024 10:53:00AM EDT	Processing	N/A	Details	▼ Actions
<input type="checkbox"/>	2529309		Application Engine	V_BN301_RPT	V_TRN_BN36102	04/22/2024 10:43:05AM EDT	Success	Posted	Details	▼ Actions

14. Click the **Actions** dropdown button.



This is a close-up of the 'Process List' table from the previous screenshot. The 'Actions' dropdown button for the second row (Instance 2529309) is highlighted with a red box.

The **Actions** dropdown menu displays.



The screenshot shows the 'Process Monitor' interface with the 'Actions' dropdown menu open for the first row (Instance 2529317). The menu items are: Update Process, Details, Parameters, Message Log, Batch Timings, and View Log/Trace.

15. Click the **View Log/Trace** list item.

Step	Action																						
	<div style="border: 1px solid black; padding: 5px;"> <p>Process List</p> <table border="1"> <thead> <tr> <th>Select</th> <th>Instance</th> <th>Seq.</th> <th>Process Type</th> <th>Process Name</th> <th>User</th> <th>Run Date/Time</th> <th>Run Status</th> <th>Distribution Status</th> <th>Details</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>2529317</td> <td></td> <td>Application Engine</td> <td>V_BN301_RPT</td> <td>V_TRN_BN36103</td> <td>04/22/2024 2:36:06PM EDT</td> <td>Success</td> <td>Posted</td> <td>Details</td> <td> <ul style="list-style-type: none"> Update Process > Details Parameters Message Log Batch Timings <li style="border: 2px solid red;">View Log/Trace </td> </tr> </tbody> </table> <p>Go back to Benefit Eligibility Audits</p> <p>Save Notify</p> </div>	Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions	<input type="checkbox"/>	2529317		Application Engine	V_BN301_RPT	V_TRN_BN36103	04/22/2024 2:36:06PM EDT	Success	Posted	Details	<ul style="list-style-type: none"> Update Process > Details Parameters Message Log Batch Timings <li style="border: 2px solid red;">View Log/Trace
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Actions													
<input type="checkbox"/>	2529317		Application Engine	V_BN301_RPT	V_TRN_BN36103	04/22/2024 2:36:06PM EDT	Success	Posted	Details	<ul style="list-style-type: none"> Update Process > Details Parameters Message Log Batch Timings <li style="border: 2px solid red;">View Log/Trace 													

The **View Log/Trace** page displays in a new window.

View Log/Trace

[Help](#)

Report

Report ID 1830988 Process Instance 2529310 [Message Log](#)
 Name V_BN301_RPT Process Type Application Engine
 Run Status Success

Benefit Eligibility Audits

Distribution Details

Distribution Node htrm Expiration Date 05/22/2024

File List

Name	File Size (bytes)	Datetime Created
AE_V_BN301_RPT_2529310.log	359	04/22/2024 10:53:58.426295AM EDT
AE_V_BN301_RPT_2529310.trc	4,002	04/22/2024 10:53:58.426295AM EDT
DepApprove.pdf	3,205	04/22/2024 10:53:58.426295AM EDT

16. Click the **DepApprove.pdf** link.

File List		
Name	File Size (bytes)	Datetime Created
AE_V_BN301_RPT_2529310.log	359	04/22/2024 10:53:58.426295AM EDT
AE_V_BN301_RPT_2529310.trc	4,002	04/22/2024 10:53:58.426295AM EDT
DepApprove.pdf	3,205	04/22/2024 10:53:58.426295AM EDT

The **Dependent Waiting Approval Benefits Eligibility Audit** report displays.



Step	Action																																																																												
	<p>Dependent Waiting Approval</p> <table border="1"> <thead> <tr> <th>Company</th> <th>Employee ID</th> <th>Ben Renewal</th> <th>Last Name</th> <th>First Name</th> <th>Middle Name</th> <th>Depend/Dep</th> <th>Dep Last</th> <th>Dep First</th> <th>Dep Middle</th> <th>DEP DOB</th> <th>Relat/Status</th> <th>Disabled Effective Date</th> <th>Uninsured As of Date</th> <th>Medicare State</th> <th>Address 1</th> <th>Address 2</th> <th>City</th> <th>State</th> <th>Postal</th> <th>Email Address</th> <th>Email Type</th> <th>Benefit Group</th> <th>Unit</th> <th>Dept ID</th> <th>Audit Reason</th> </tr> </thead> <tbody> <tr> <td>JCC</td> <td>0080033000</td> <td>D</td> <td>Shaps</td> <td>Jager</td> <td></td> <td>01</td> <td>Shaps</td> <td>Jager</td> <td></td> <td>6/1/1999</td> <td>SP</td> <td>N</td> <td>6/1/2024</td> <td></td> <td>000 Main Street</td> <td></td> <td>Richmond</td> <td>VA</td> <td>23219</td> <td>noemail@alright@JUN</td> <td>999000000</td> <td>99900</td> <td>JCC705</td> <td>Documentation Approval</td> </tr> <tr> <td>JCC</td> <td>0080033000</td> <td>D</td> <td>Shaps</td> <td>Jager</td> <td></td> <td>02</td> <td>Shaps</td> <td>Jager</td> <td></td> <td>6/12/2019</td> <td>SC</td> <td>N</td> <td>6/1/2024</td> <td></td> <td>000 Main Street</td> <td></td> <td>Richmond</td> <td>VA</td> <td>23219</td> <td>noemail@alright@JUN</td> <td>999000000</td> <td>99900</td> <td>JCC705</td> <td>Documentation Approval</td> </tr> </tbody> </table>	Company	Employee ID	Ben Renewal	Last Name	First Name	Middle Name	Depend/Dep	Dep Last	Dep First	Dep Middle	DEP DOB	Relat/Status	Disabled Effective Date	Uninsured As of Date	Medicare State	Address 1	Address 2	City	State	Postal	Email Address	Email Type	Benefit Group	Unit	Dept ID	Audit Reason	JCC	0080033000	D	Shaps	Jager		01	Shaps	Jager		6/1/1999	SP	N	6/1/2024		000 Main Street		Richmond	VA	23219	noemail@alright@JUN	999000000	99900	JCC705	Documentation Approval	JCC	0080033000	D	Shaps	Jager		02	Shaps	Jager		6/12/2019	SC	N	6/1/2024		000 Main Street		Richmond	VA	23219	noemail@alright@JUN	999000000	99900	JCC705	Documentation Approval
Company	Employee ID	Ben Renewal	Last Name	First Name	Middle Name	Depend/Dep	Dep Last	Dep First	Dep Middle	DEP DOB	Relat/Status	Disabled Effective Date	Uninsured As of Date	Medicare State	Address 1	Address 2	City	State	Postal	Email Address	Email Type	Benefit Group	Unit	Dept ID	Audit Reason																																																				
JCC	0080033000	D	Shaps	Jager		01	Shaps	Jager		6/1/1999	SP	N	6/1/2024		000 Main Street		Richmond	VA	23219	noemail@alright@JUN	999000000	99900	JCC705	Documentation Approval																																																					
JCC	0080033000	D	Shaps	Jager		02	Shaps	Jager		6/12/2019	SC	N	6/1/2024		000 Main Street		Richmond	VA	23219	noemail@alright@JUN	999000000	99900	JCC705	Documentation Approval																																																					
	<p>i 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.</p>																																																																												

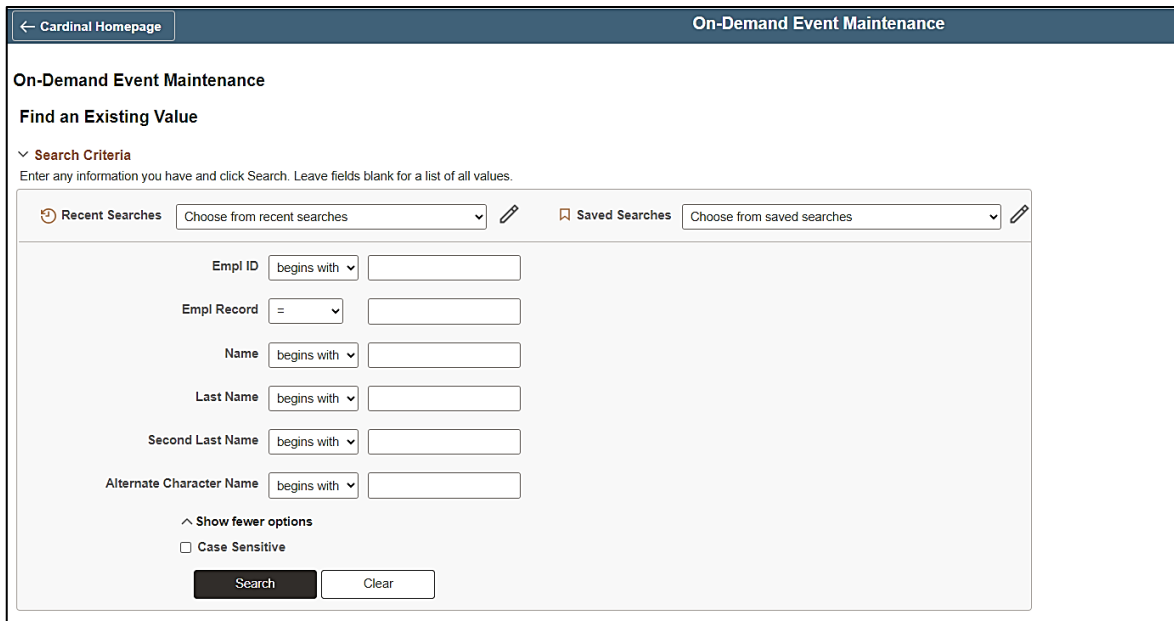
How to Approve a Dependent

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

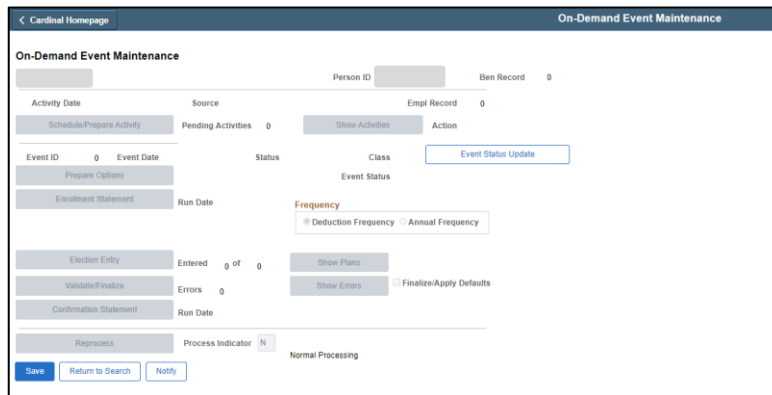
The **On-Demand-Event Maintenance Search** page displays.



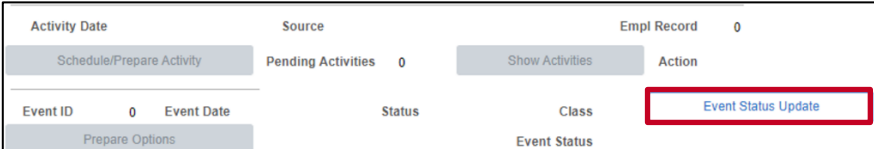

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

Step	Action
2.	<p>Enter the applicable employee's Employee ID in the Empl ID field.</p> 
	<p>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.</p>
3.	<p>Click the Search button.</p> 

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

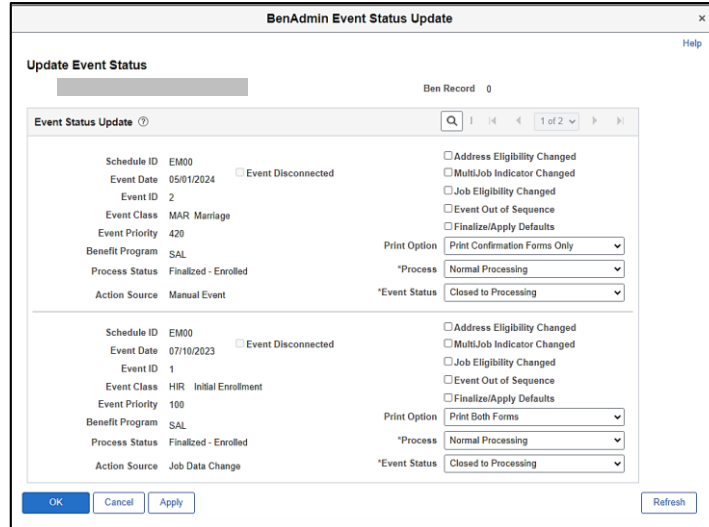


	<p>The Pending Activities field displays a "0" as there are no Benefit Events for this employee that are open for processing.</p> 
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4.	<p>Click the Event Status Update button.</p> 
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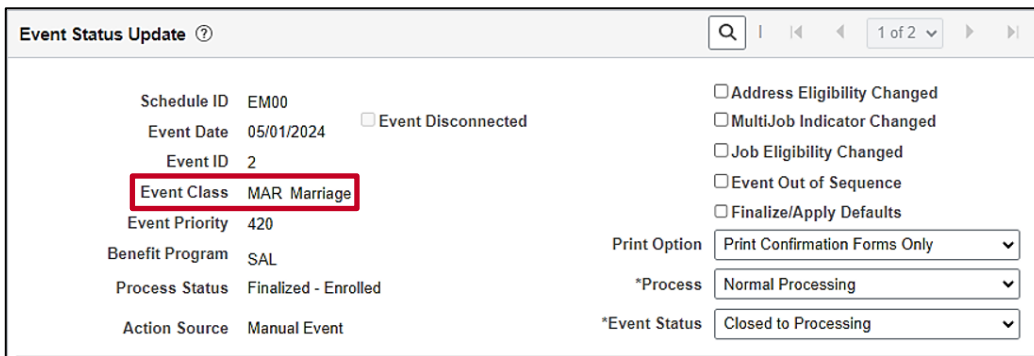
Step	Action
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The **Update Event Status** page displays in a pop-up window.

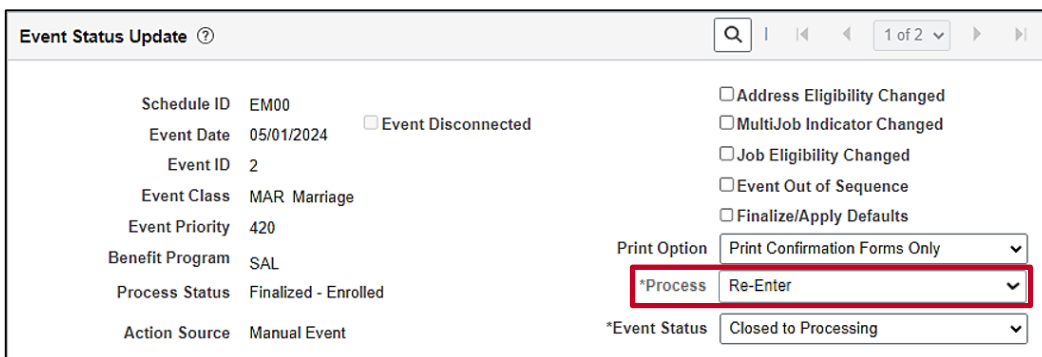


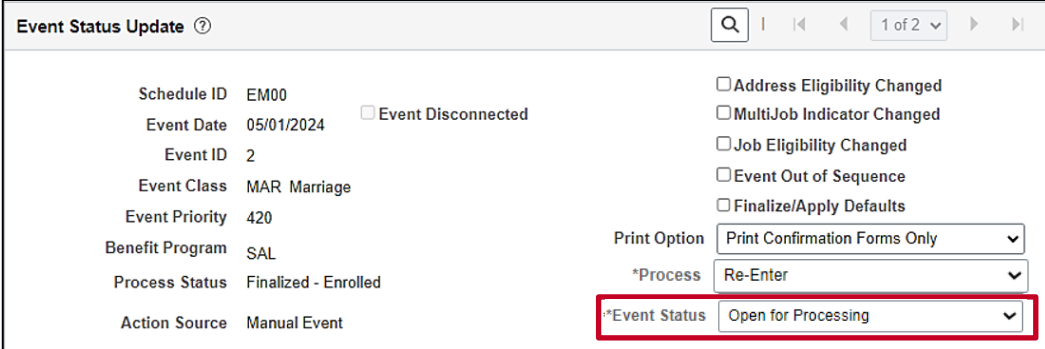

Review the events listed and identify the event used to enroll the dependents.

Most of the time, you are looking for a New Hire, recent life event, or Open Enrollment event. In this example, it is a MAR (Marriage) Benefit Event. Once the event is identified, you will need to re-open the event to approve the dependent.

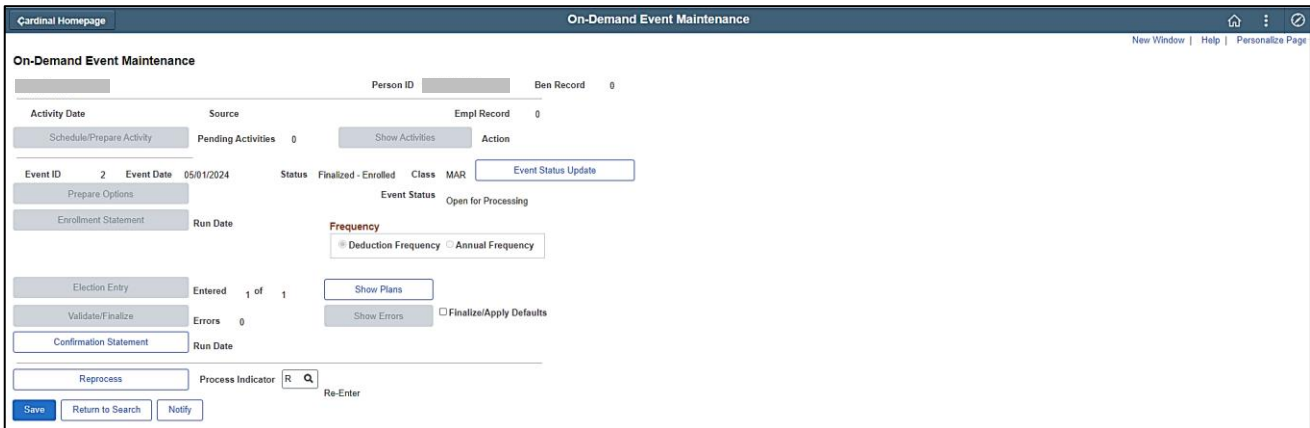




5. Click the **Process** dropdown button and select “Re-Enter”.



Step	Action
6.	<p>Click the Event Status dropdown button and select “Open for Processing”.</p> 
7.	<p>Click the OK button at the bottom of the page.</p> 

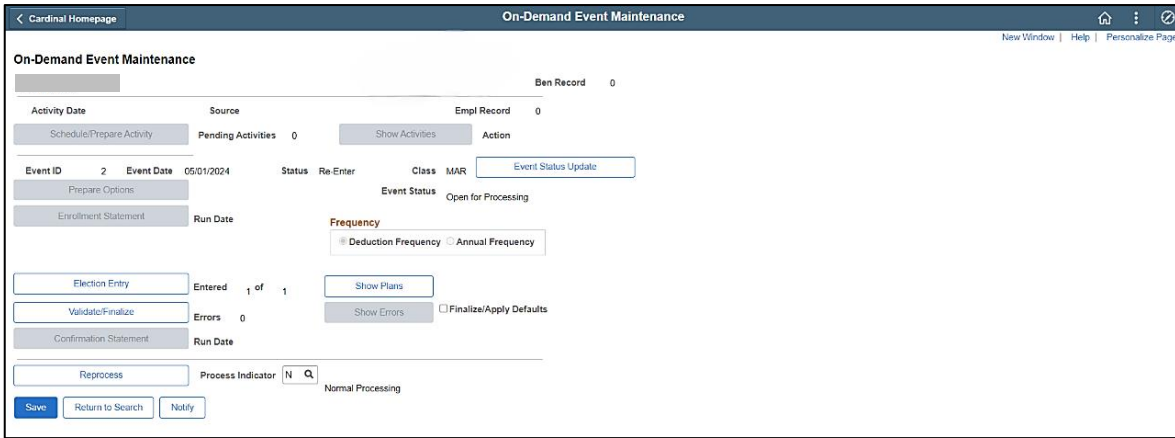
The **On-Demand Event Maintenance** page redisplay.



Step	Action
	<p>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.</p> <div data-bbox="289 443 1401 1094" style="border: 1px solid black; padding: 5px;"> <p>On-Demand Event Maintenance</p> <p>Person ID [redacted] Ben Record 0</p> <p>Activity Date [redacted] Source [redacted] Empl Record 0</p> <p>Schedule/Prepare Activity Pending Activities 0 Show Activities Action</p> <hr/> <p>Event ID 2 Event Date 05/01/2024 Status Finalized - Enrolled Class MAR Event Status Update</p> <p>Prepare Options Event Status Open for Processing</p> <p>Enrollment Statement Run Date</p> <p>Election Entry Entered 1 of 1 Frequency <input checked="" type="radio"/> Deduction Frequency <input type="radio"/> Annual Frequency</p> <p>Validate/Finalize Errors 0 Show Plans Show Errors <input type="checkbox"/> Finalize/Apply Defaults</p> <p>Confirmation Statement Run Date</p> <p>Reprocess Process Indicator R Re-Enter</p> <p>Save Return to Search Notify</p> </div>
8.	<p>Click the Reprocess button.</p> <div data-bbox="289 1178 1442 1352" style="border: 1px solid black; padding: 5px;"> <p>Reprocess Process Indicator R Re-Enter</p> <p>Save Return to Search Notify</p> </div>
11.	<p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <p>Click the OK button to close the message.</p> <div data-bbox="289 1524 597 1583" style="border: 1px solid black; padding: 5px;"> <p>OK Cancel</p> </div>

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



On-Demand Event Maintenance

Activity Date: [] Source: [] Empl Record: 0 Ben Record: 0

Schedule/Prepare Activity Pending Activities: 0 Show Activities Action

Event ID: 2 Event Date: 05/01/2024 Status: Re-Enter Class: MAR Event Status: Open for Processing

Prepare Options Enrollment Statement Run Date

Frequency: Deduction Frequency Annual Frequency

Election Entry Entered: 1 of 1 Show Plans

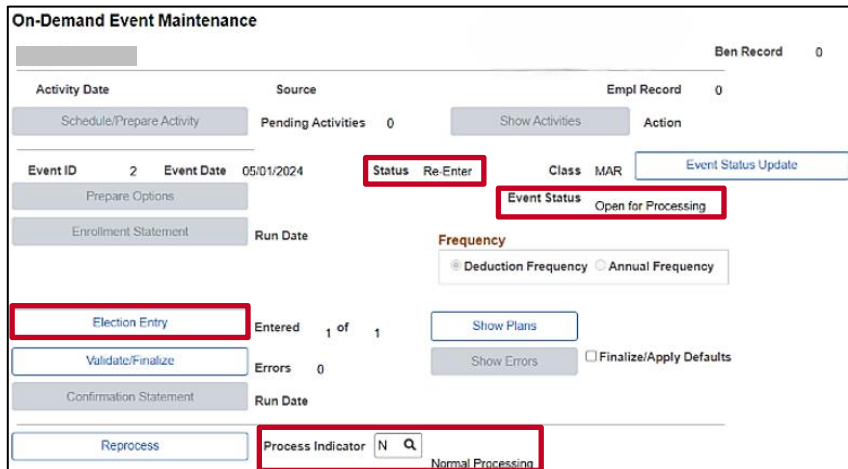
Validate/Finalize Errors: 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator: N Normal Processing

Save Return to Search Notify

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.

On-Demand Event Maintenance

Activity Date: [] Source: [] Empl Record: 0 Ben Record: 0

Schedule/Prepare Activity Pending Activities: 0 Show Activities Action

Event ID: 2 Event Date: 05/01/2024 **Status: Re-Enter** Class: MAR **Event Status: Open for Processing**

Prepare Options 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

12. Click the **Election Entry** button.



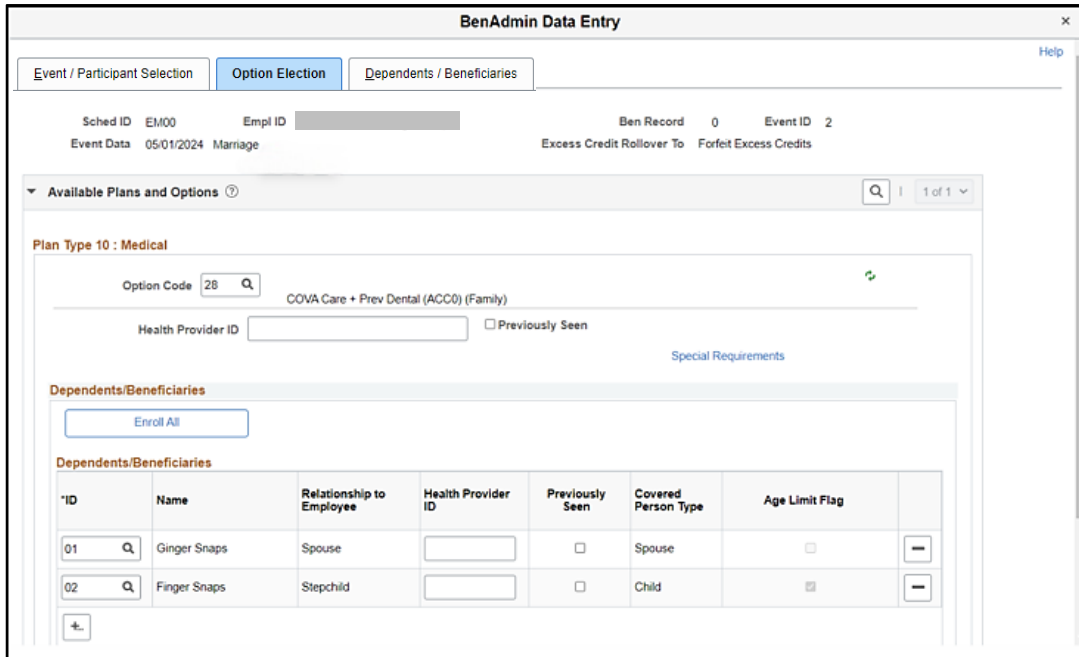
Election Entry Entered: 1 of 1 Show Plans

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

Confirmation Statement Run Date

Step	Action
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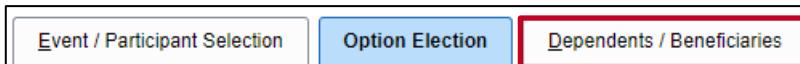
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.



The screenshot shows the 'BenAdmin Data Entry' application window with the 'Option Election' tab selected. The interface includes a header with navigation tabs: 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Below the tabs, there are fields for 'Sched ID' (EM00), 'Empl ID' (redacted), 'Ben Record' (0), and 'Event ID' (2). The 'Event Data' is '05/01/2024 Marriage'. A section titled 'Available Plans and Options' shows 'Plan Type 10 : Medical' with an 'Option Code' of '28' and a description 'COVA Care + Prev Dental (ACC0) (Family)'. There is a 'Health Provider ID' field and a 'Previously Seen' checkbox. Below this is a 'Dependents/Beneficiaries' section with an 'Enroll All' button and a table listing dependents.

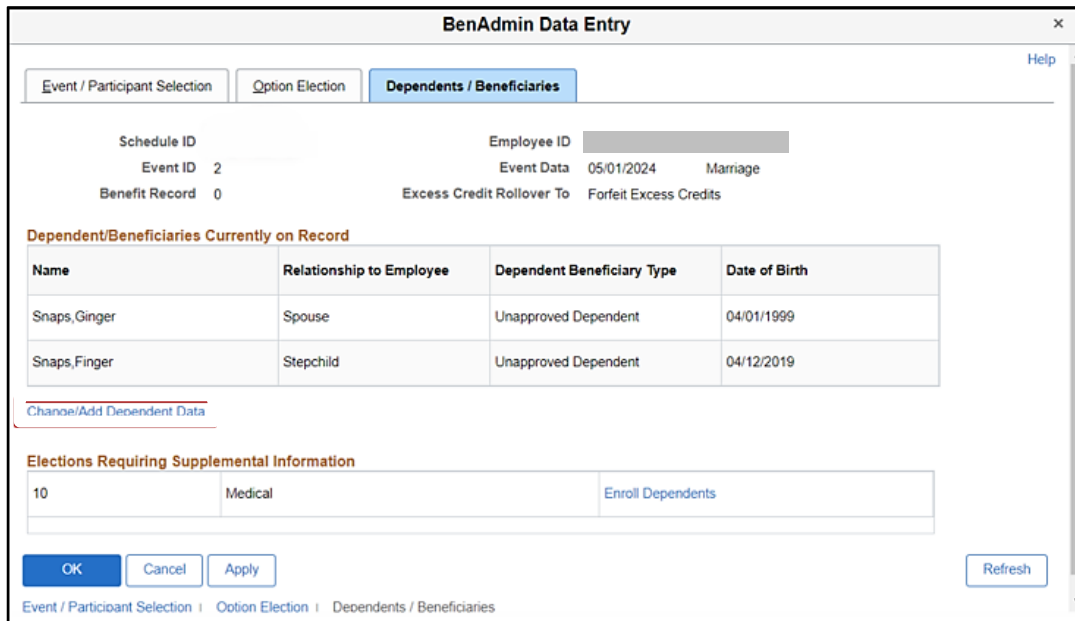
ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Ginger Snaps	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Finger Snaps	Stepchild		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

13. Click the **Dependents / Beneficiaries** tab.



This screenshot shows the navigation tabs at the top of the application. The 'Dependents / Beneficiaries' tab is highlighted with a red rectangular box, indicating it is the target of the action.


The **Dependents/Beneficiaries** tab displays.



The screenshot shows the 'BenAdmin Data Entry' application window with the 'Dependents / Beneficiaries' tab selected. The header shows 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Schedule ID' is 'EM00', 'Employee ID' is redacted, 'Event ID' is '2', and 'Event Data' is '05/01/2024 Marriage'. Below this is a table titled 'Dependent/Beneficiaries Currently on Record'.

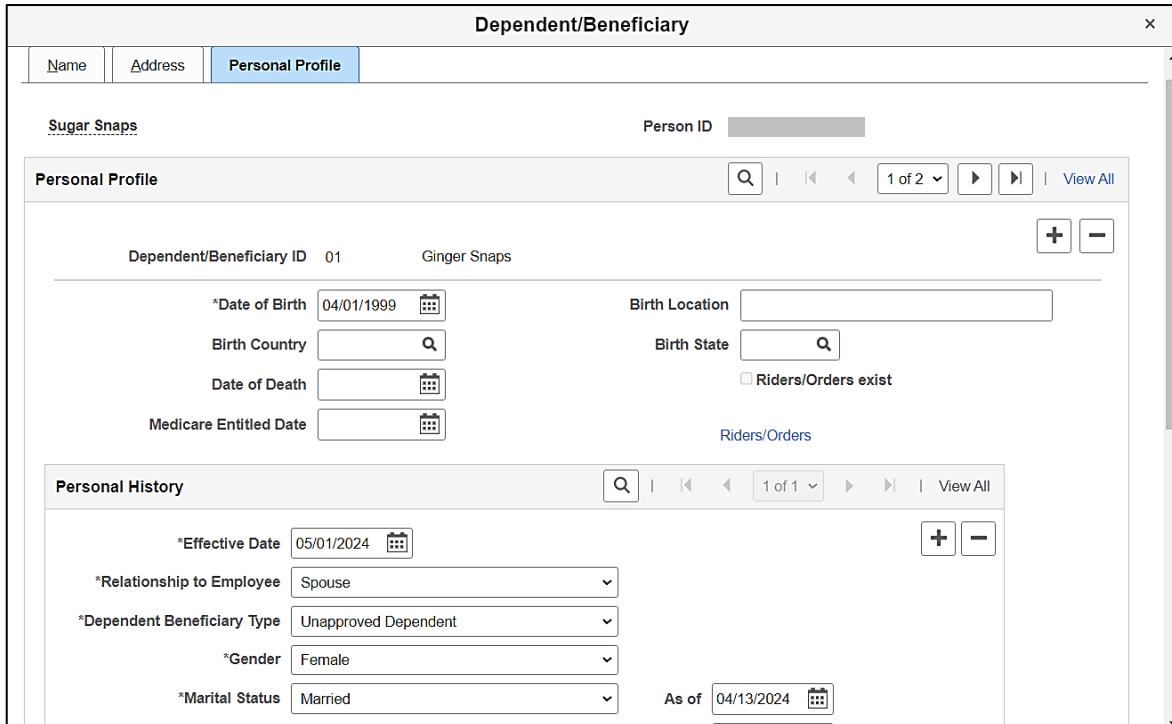
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Snaps, Ginger	Spouse	Unapproved Dependent	04/01/1999
Snaps, Finger	Stepchild	Unapproved Dependent	04/12/2019

Below the table is a link 'Change/Add Dependent Data'. Another section titled 'Elections Requiring Supplemental Information' shows a table with '10' and 'Medical' in the first two columns, and an 'Enroll Dependents' button in the third column. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

Step	Action												
	<p>Review the dependents in the Dependent/Beneficiaries Currently on Record table. Note that the dependents currently have a status of “Unapproved Dependent”.</p> <div data-bbox="292 409 1421 651" style="border: 1px solid black; padding: 5px;"> <p>Dependent/Beneficiaries Currently on Record</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship to Employee</th> <th>Dependent Beneficiary Type</th> <th>Date of Birth</th> </tr> </thead> <tbody> <tr> <td>Snaps, Ginger</td> <td>Spouse</td> <td>Unapproved Dependent</td> <td>04/01/1999</td> </tr> <tr> <td>Snaps, Finger</td> <td>Stepchild</td> <td>Unapproved Dependent</td> <td>04/12/2019</td> </tr> </tbody> </table> <p>Change/Add Dependent Data</p> </div>	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
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										
14.	<p>Click the Change/Add Dependent Data link.</p> <div data-bbox="292 735 1421 976" style="border: 1px solid black; padding: 5px;"> <p>Dependent/Beneficiaries Currently on Record</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship to Employee</th> <th>Dependent Beneficiary Type</th> <th>Date of Birth</th> </tr> </thead> <tbody> <tr> <td>Snaps, Ginger</td> <td>Spouse</td> <td>Unapproved Dependent</td> <td>04/01/1999</td> </tr> <tr> <td>Snaps, Finger</td> <td>Stepchild</td> <td>Unapproved Dependent</td> <td>04/12/2019</td> </tr> </tbody> </table> <p>Change/Add Dependent Data</p> </div>	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
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										
	<p>The Dependent/Beneficiary page displays.</p> <div data-bbox="267 1113 1372 1690" style="border: 1px solid gray; padding: 10px;"> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> Person ID </div> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> <p>Dependent/Beneficiaries 1 of 2 View All</p> <p>*Dependent/Beneficiary ID <input type="text" value="01"/> + -</p> </div> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> <p>Name History 1 of 1 View All</p> <p>*Effective Date <input type="text" value="05/01/2024"/> + -</p> <p>*Format Type <input type="text" value="English"/> + -</p> <p>Display Name <input type="text" value="Ginger Snaps"/> Edit Name</p> </div> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> <p>OK Cancel Apply</p> </div> </div>												
15.	<p>Click the Personal Profile tab.</p> <div data-bbox="292 1774 876 1858" style="border: 1px solid gray; padding: 5px;"> <p>Name Address Personal Profile</p> </div>												

Step	Action
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The **Personal Profile** tab displays.



Dependent/Beneficiary [x]

Name | Address | **Personal Profile**

Sugar Snaps | Person ID [redacted]

Personal Profile [Search] | [Navigation] | 1 of 2 | [View All]

Dependent/Beneficiary ID 01 | Ginger Snaps [Add] [Remove]

*Date of Birth 04/01/1999 [Calendar] | Birth Location [Text Box]
 Birth Country [Search] | Birth State [Search]
 Date of Death [Calendar] | Riders/Orders exist
 Medicare Entitled Date [Calendar] | Riders/Orders

Personal History [Search] | [Navigation] | 1 of 1 | [View All]

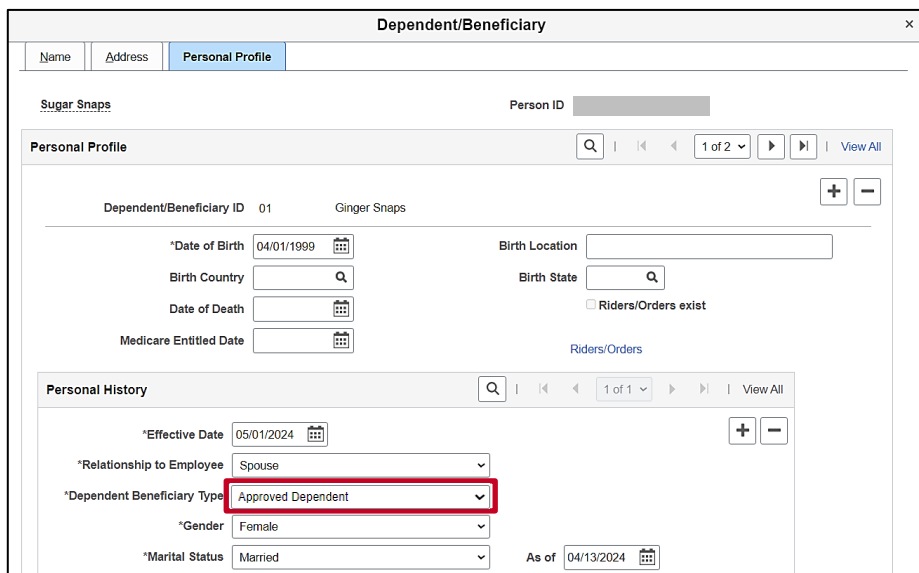
*Effective Date 05/01/2024 [Calendar] [Add] [Remove]
 *Relationship to Employee Spouse [Dropdown]
 *Dependent Beneficiary Type Unapproved Dependent [Dropdown]
 *Gender Female [Dropdown]
 *Marital Status Married [Dropdown] | As of 04/13/2024 [Calendar]



Ensure that you are viewing the applicable dependent.

16.

Click the **Dependent Beneficiary Type** dropdown button and select “Approved Dependent”



Dependent/Beneficiary [x]

Name | Address | **Personal Profile**

Sugar Snaps | Person ID [redacted]

Personal Profile [Search] | [Navigation] | 1 of 2 | [View All]

Dependent/Beneficiary ID 01 | Ginger Snaps [Add] [Remove]

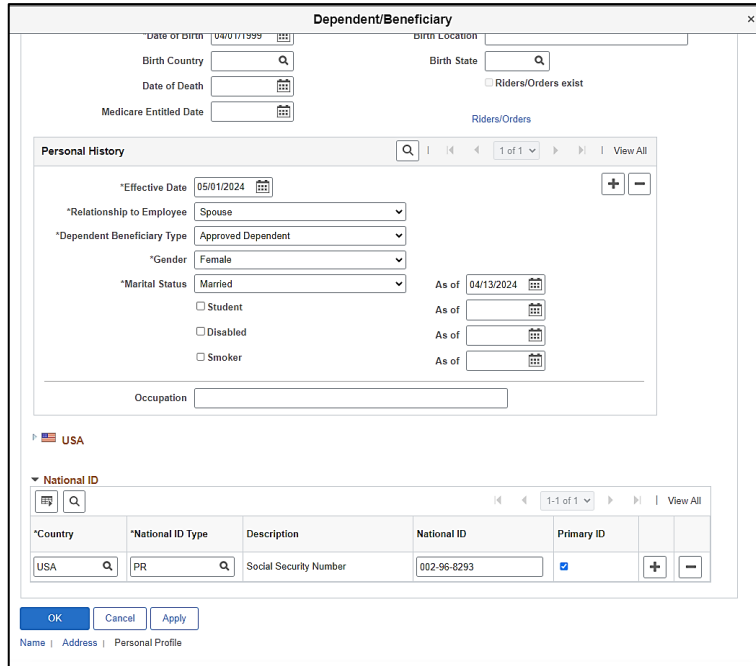
*Date of Birth 04/01/1999 [Calendar] | Birth Location [Text Box]
 Birth Country [Search] | Birth State [Search]
 Date of Death [Calendar] | Riders/Orders exist
 Medicare Entitled Date [Calendar] | Riders/Orders

Personal History [Search] | [Navigation] | 1 of 1 | [View All]

*Effective Date 05/01/2024 [Calendar] [Add] [Remove]
 *Relationship to Employee Spouse [Dropdown]
 *Dependent Beneficiary Type **Approved Dependent** [Dropdown]
 *Gender Female [Dropdown]
 *Marital Status Married [Dropdown] | As of 04/13/2024 [Calendar]

Step	Action
17.	Scroll down to the bottom of the page.

The bottom of the **Dependent/Beneficiary** page displays.



Dependent/Beneficiary

Date of Birth: 04/01/1999
 Birth Country: [Search]
 Date of Death: [Calendar]
 Medicare Entitled Date: [Calendar]

Birth Location: [Search]
 Birth State: [Search]
 Riders/Orders exist

Personal History

*Effective Date: 05/01/2024
 *Relationship to Employee: Spouse
 *Dependent Beneficiary Type: Approved Dependent
 *Gender: Female
 *Marital Status: Married
 Student
 Disabled
 Smoker

As of: 04/13/2024
 As of: [Calendar]
 As of: [Calendar]
 As of: [Calendar]

Occupation: [Text]

USA

National ID

*Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	002-96-8293	<input checked="" type="checkbox"/>

OK Cancel Apply

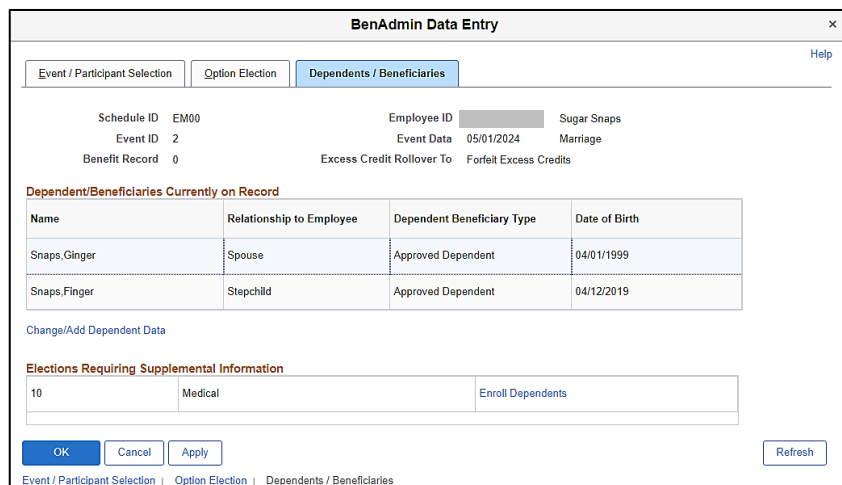
Name | Address | Personal Profile

18.	Repeat these steps to update the status to “Approved Dependent” for any additional dependents as needed and then click the OK button at the bottom of the page.
-----	--

OK Cancel Apply

Name | Address | Personal Profile

The **Dependents / Beneficiaries** tab redisplay



BenAdmin Data Entry

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

Schedule ID: EM00 Employee ID: [Redacted] Sugar Snaps
 Event ID: 2 Event Date: 05/01/2024 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
Snaps, Ginger	Spouse	Approved Dependent	04/01/1999
Snaps, Finger	Stepchild	Approved Dependent	04/12/2019

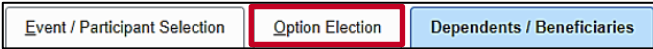
Change/Add Dependent Data

Elections Requiring Supplemental Information

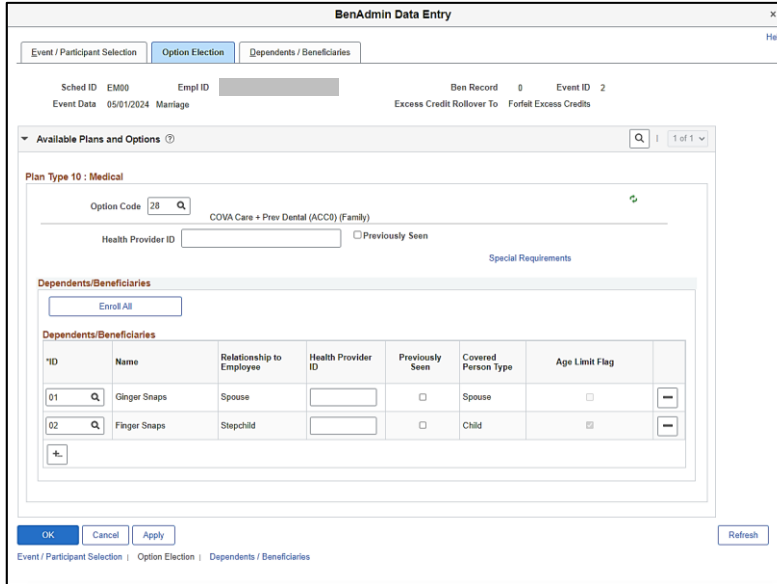
10	Medical	Enroll Dependents
----	---------	-------------------

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Step	Action
19.	Once all dependents have been changed from “Unapproved Dependent” to “Approved Dependent”, click the Option Election tab. 

The **Option Election** tab displays.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] Ben Record 0 Event ID 2
 Event Date 05/01/2024 Marriage Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options ①

Plan Type 10 : Medical

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

Health Provider ID [REDACTED] Previously Seen Special Requirements

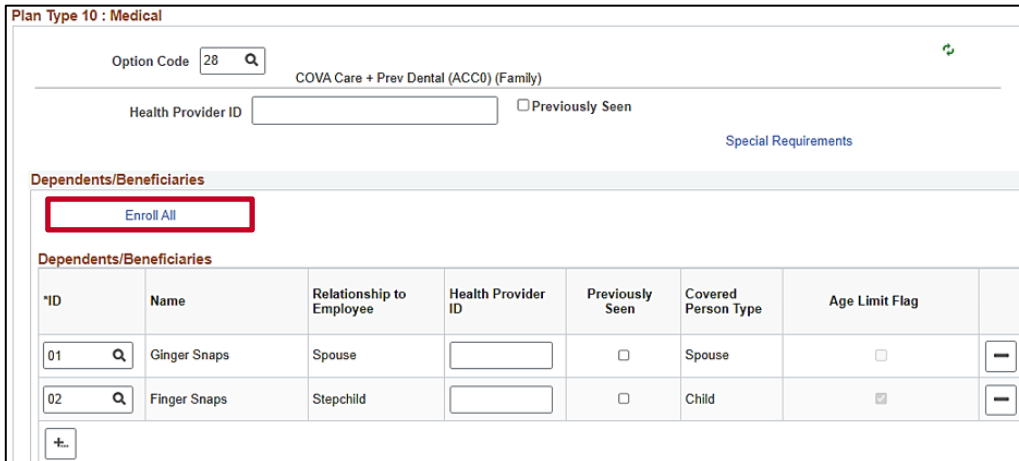
Enroll All

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Ginger Snaps	Spouse	[REDACTED]	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Finger Snaps	Stepchild	[REDACTED]	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

20. Review the **Dependents/Beneficiaries** table and ensure that applicable dependents are enrolled. Click the **Enroll All** button as needed.



Plan Type 10 : Medical

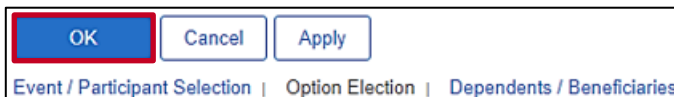
Option Code 28 COVA Care + Prev Dental (ACC0) (Family)

Health Provider ID [REDACTED] Previously Seen Special Requirements

Enroll All

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Ginger Snaps	Spouse	[REDACTED]	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Finger Snaps	Stepchild	[REDACTED]	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

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

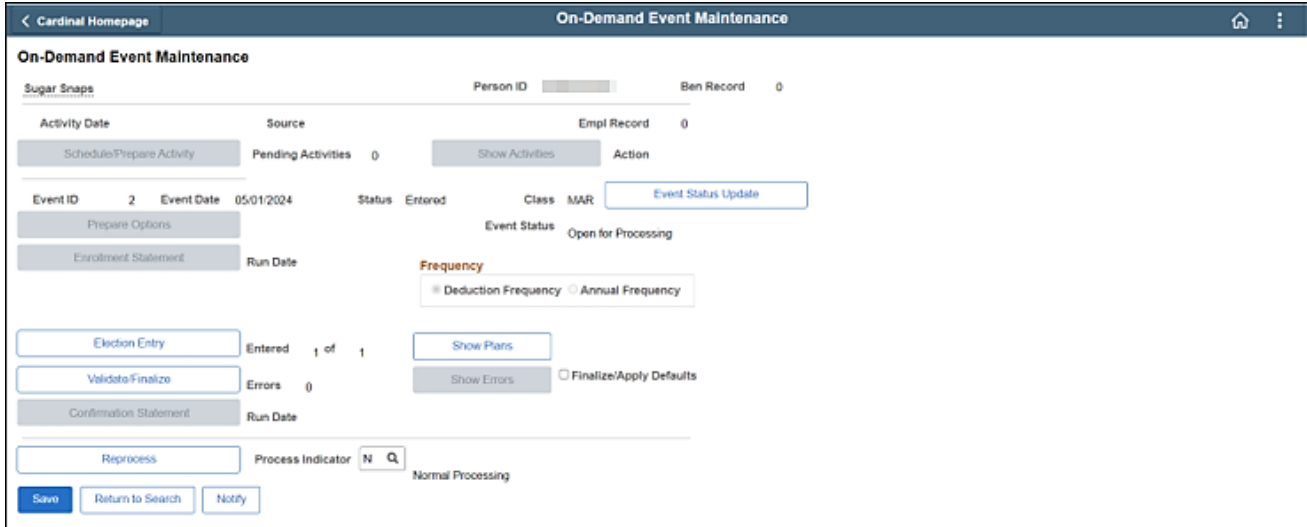


OK Cancel Apply

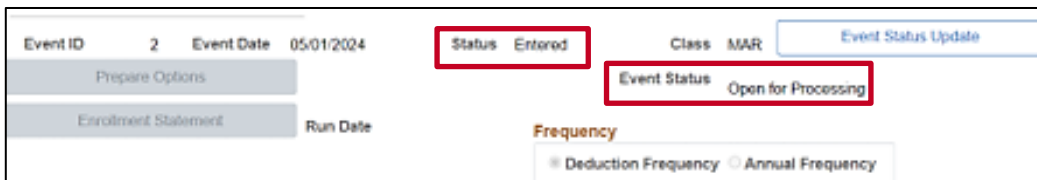
Event / Participant Selection | Option Election | Dependents / Beneficiaries

Step	Action
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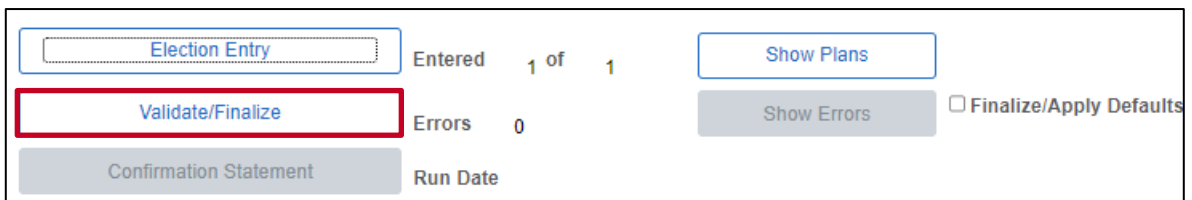
The **On-Demand Maintenance** page displays.



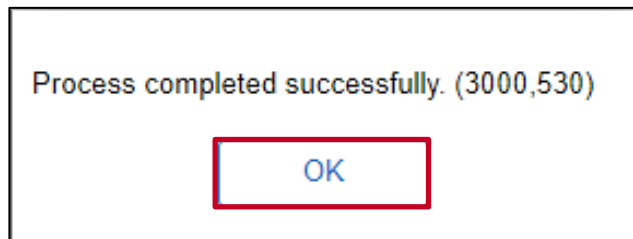
22. Confirm that the **Status** field now displays as “Entered” and the **Event Status** field is still “Open for Processing”.



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

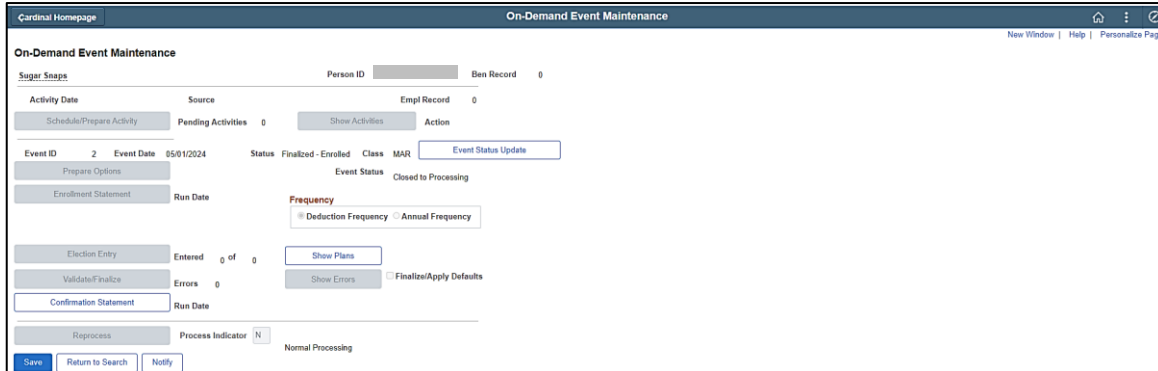


24. Once the process completes, a **Confirmation** message displays in a pop up window. Click the **OK** button.



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



Cardinal Homepage On-Demand Event Maintenance

Super Snaps 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 Finalized - Enrolled Class MAR 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

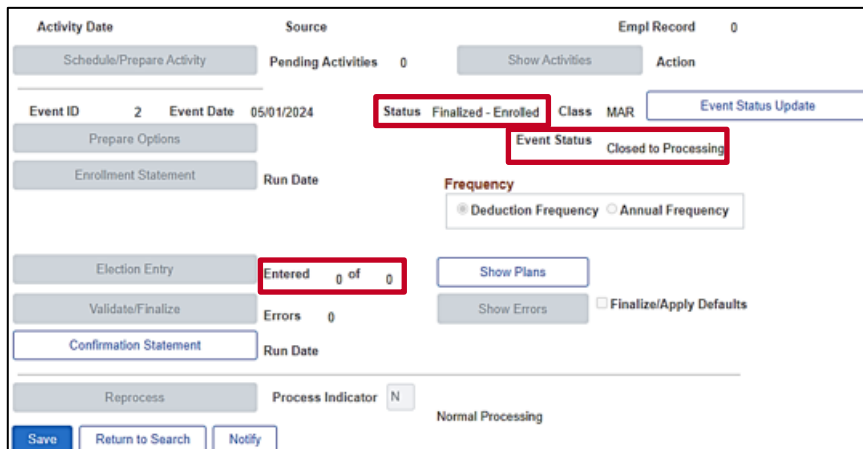
Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

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”.

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 05/01/2024 Status Finalized - Enrolled Class MAR 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 Notify

25.

Click the **Save** button.



Save Return to Search Notify