## Linking Dependents and Retirees Overview

This Job Aid provides guidance on the process to Link Dependents to Retirees, LTD members, and LODA participants.

Note: All further references to "Retirees" will include Retirees, LTD members, and LODA participants.

In Cardinal, Dependents of Retirees require their own Employee ID (EmplID) when either the Retiree or Dependent enrolls in a Medicare coordinating plan, as all Medicare-eligible enrollments are for single coverage. This establishes the Dependent as a "Linked Dependent".
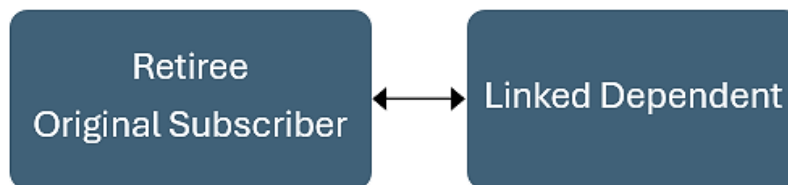
A separate Employee ID for a Dependent is needed when:

- A Retiree is eligible for Medicare, but their Dependent is under 65 and needs a non-Medicare coordinating plan
- A Dependent is eligible for Medicare, but the Retiree is under 65 and enrolling in a non-Medicare coordinating plan
- Both the Retiree and Dependent are Medicare eligible and enrolling in Medicare

Why linking is crucial:

Once a Dependent has a separate Employee ID, a link is established on the personal information pages of both the Retiree's and the Linked Dependent's record. This link serves three important purposes:

- **Coverage Tracking**: Allows administrators to identify all linked records for the original subscriber
- **Eligibility Management**: Ensures that if the Retiree loses eligibility, the Dependent's coverage can also be identified and terminated
- **Age-Based Removal**: Facilitates the automatic removal of Linked Dependents at the end of the year in which they turn 26

To link the two records together, the HR Administrator must populate the **Linked Participant EmplID** field as well as complete the **Other Linked Participant EmplID** section on the **VA Person Info** tab on the **Modify a Person** page for both the original subscriber, and then repeat for the Linked Dependent(s). Users must perform the steps outlined in this Job Aid for the original subscriber, and then repeat for the Linked Dependent(s) so that all parties (original subscribers and Linked Dependents) have both the Linked Participant EmplID and the Other Linked Participant Data populated.

- The Retiree's record (original subscriber) is populated with the Linked Dependent's EmplID
- The Linked Dependent's record is populated with the Retiree's (original subscriber) EmplID

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.
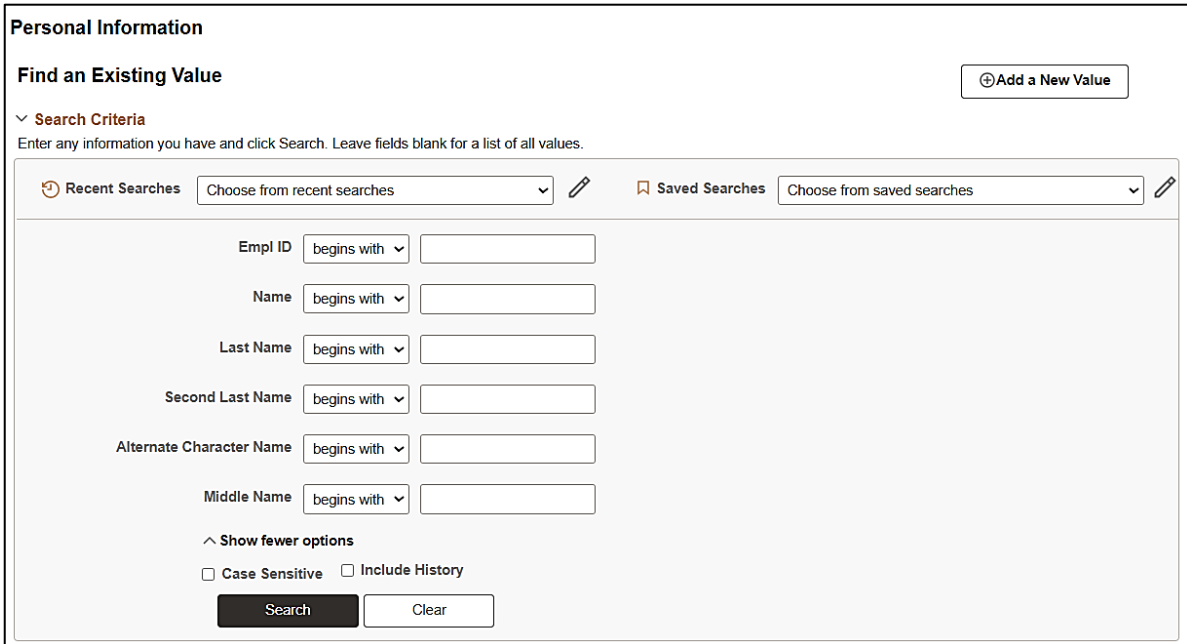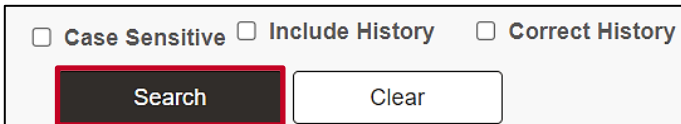
Table of Contents

Revision History
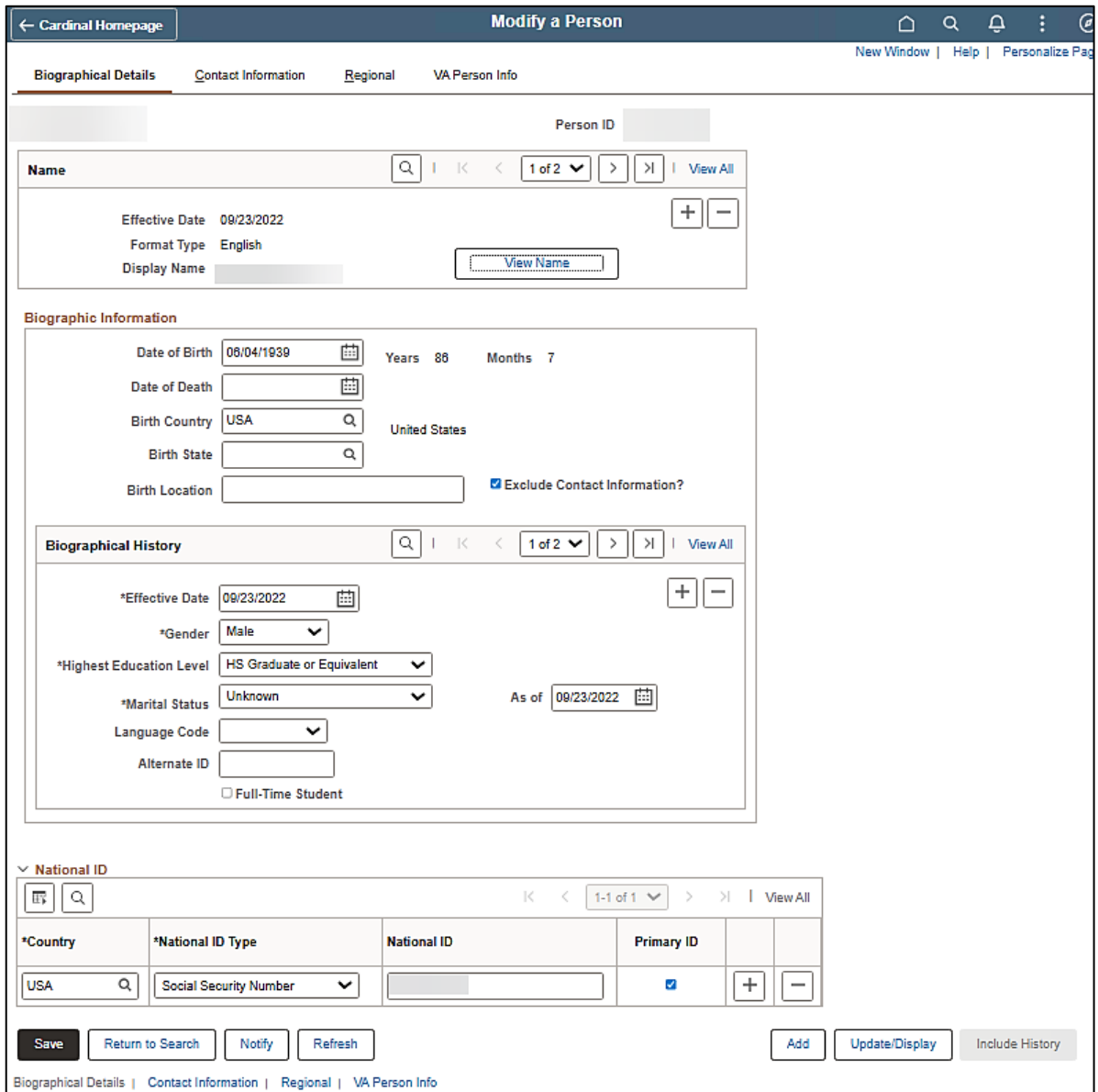
Revision Date	Summary of Changes
1/13/2026	Baseline.

Linking Dependents and Retirees

Step	Action
1.	Navigate to the **Modify a Person** page using the following path: **Navigator > Workforce Administration > Personal Information > Modify a Person**
	The **Personal Information Find an Existing Value Search** page displays.
(i)	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**.
2.	Enter the Retiree'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.
3.	Click the **Search** button.

Step	Action
	The **Modify a Person** page displays for the Retiree with the **Biographical Details** tab displayed by default.
4.	Click the **VA Person Info** tab.

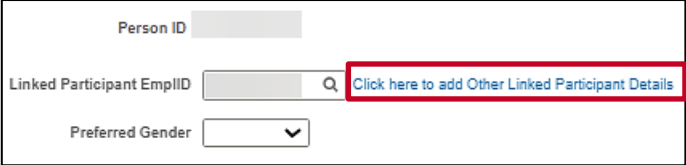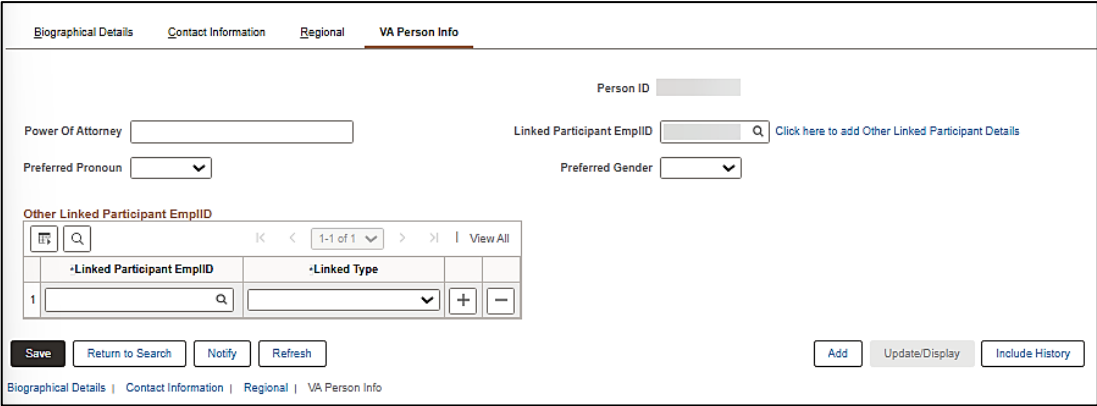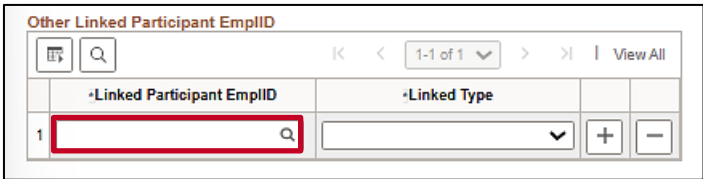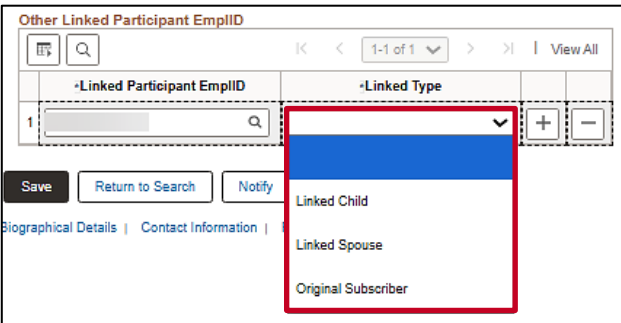| Step	Action
	The **VA Person Info** page displays. ← Cardinal Homepage Modify a Per Biographical Details Contact Information Regional **VA Person Info** Person ID Power Of Attorney Linked Participant EmplID 🔍 Preferred Pronoun ▼ Preferred Gender ▼ Save Return to Search Notify Refresh Add Update/Display Include History Biographical Details	Contact Information	Regional	VA Person Info
5.	Enter the Employee ID of the Dependent to be linked to the Retiree in the **Linked Participant EmplID** field and tab out of the field. Person ID Linked Participant EmplID 🔍 Preferred Gender ▼
	The Retiree's record is populated with the Linked Dependent's EmplID. ← Cardinal Homepage Modify a Per Biographical Details Contact Information Regional **VA Person Info** Person ID Power Of Attorney Linked Participant EmplID 🔍 Click here to add Other Linked Participant Details Preferred Pronoun ▼ Preferred Gender ▼ Save Return to Search Notify Refresh Add Update/Display Include History Biographical Details	Contact Information	Regional	VA Person Info
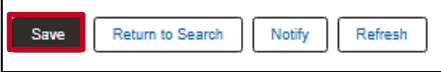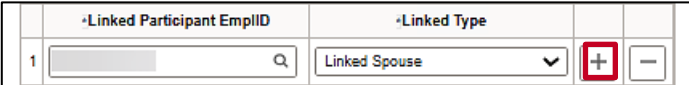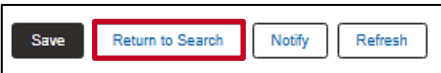
Step	Action
6.	Click the **Click here to add Other Linked Participants Details** link.
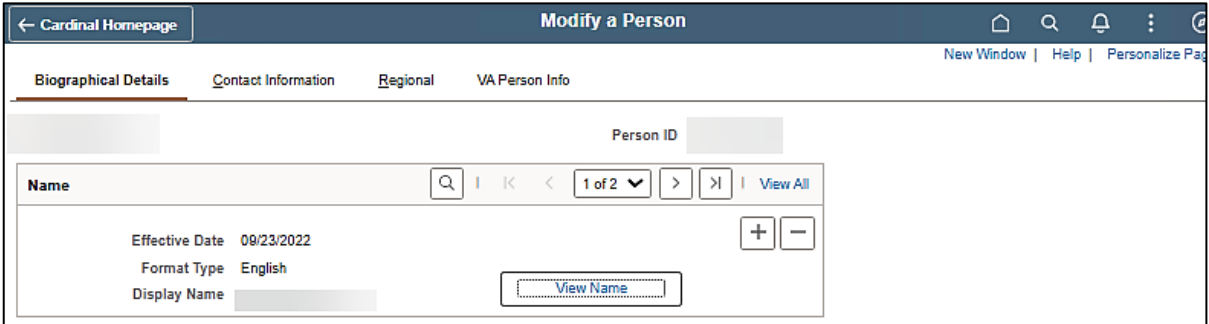
The **VA Person Info** page redisplays with the **Other Linked Participants** section available.

Step	Action
7.	Enter the Employee ID of the Dependent to be linked in the **Linked Participant EmplID** field.
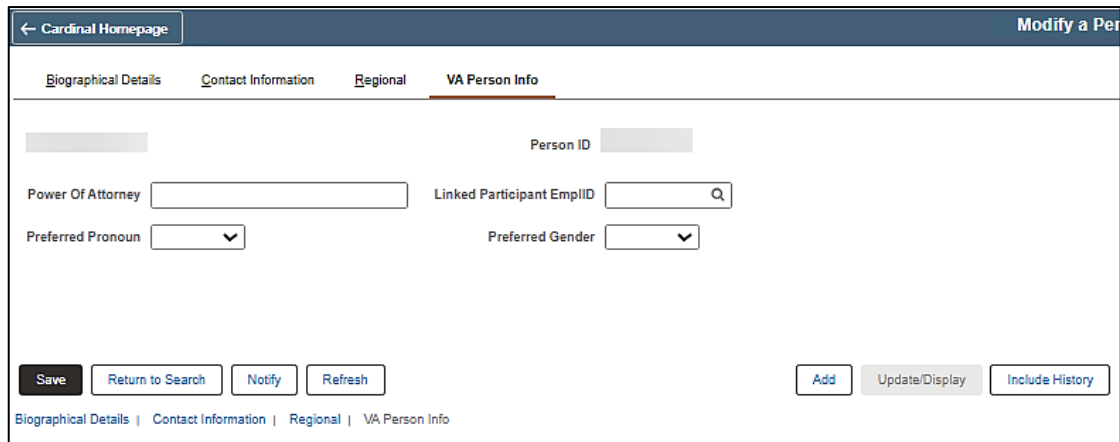
Step	Action
8.	Click the **Linked Type** dropdown button and select "Linked Child" or "Linked Spouse" as applicable.

Step	Action
9.	Click the **Save** button. Save / Return to Search / Notify / Refresh
(i)	In some cases, it will be necessary to link multiple Dependents to the same Retiree. Here are some scenarios where multiple separate Employee IDs are required for Dependents: • **Retiree and Spouse on Medicare**, **Child on Non-Medicare coordinating Plan**: The spouse and the child will both have the Retiree's Employee ID recorded in their Linked Participant ID fields. • **Retiree on Medicare**, **Spouse on Employee + Child Non-Medicare coordinating Plan**, **Spouse Becomes Ineligible**: If the spouse either turns 65 and enrolls in Medicare or becomes ineligible due to death or divorce, a new Employee ID is needed for the child. This new child record will then be linked to the Retiree's record. • **Retiree on Medicare**, **Linked Child Ages Out**, **Younger Child Needs Coverage**: If a Linked Child ages out of coverage eligibility, a new Employee ID must be created for a younger child to continue coverage, and this record must be linked to the Retiree's record.
10.	If more than one Dependent needs to be linked, click the **Add a New Row** (**+**) button to add an additional Dependent. Linked Participant EmplID / Linked Type 1 [ ] 🔍 / Linked Spouse ∨ / [+] [−]
The **Other Linked Participant EmplID** section displays with the additional row. Other Linked Participant EmplID 1-2 of 2 | View All Linked Participant EmplID / Linked Type 1 [ ] 🔍 / Linked Spouse ∨ / + − 2 [ ] 🔍 / ∨ / + −	
11.	Repeat **Steps 7 – 9** as needed for each Dependent to be linked to the Retiree.
(i)	Now that the Dependent is linked to the Retiree's record, the Retiree must be linked to the Dependent's record. The steps below must be completed for each Linked Dependent.
12.	Click the **Return to Search** button. Save / Return to Search / Notify / Refresh

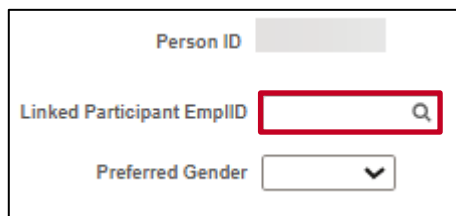| Step	Action
13.	Enter the Linked Dependent's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ▾] [ ]
14.	Click the **Search** button. ☐ Case Sensitive ☐ Include History ☐ Correct History [Search] [Clear]
	The **Modify a Person** page displays for the Dependent with **Biographical Details** tab displayed by default.
15.	Click the **VA Person Info** tab.
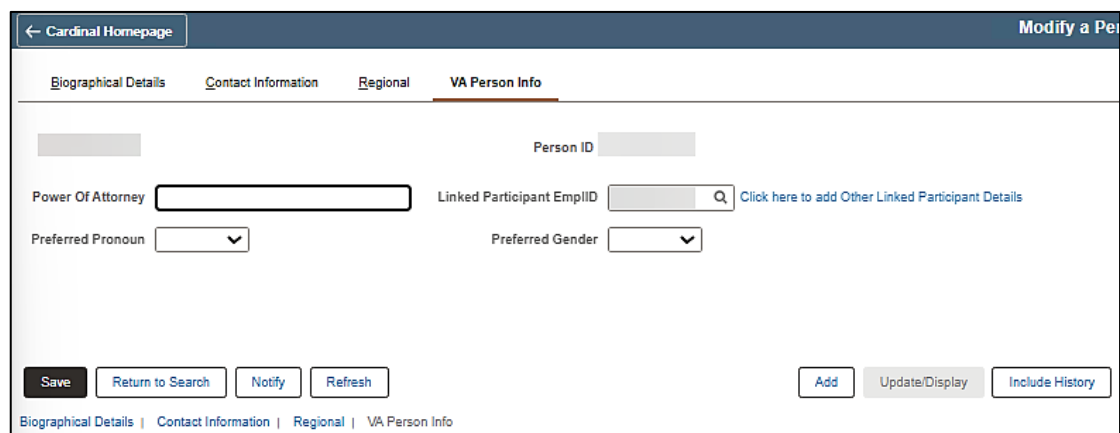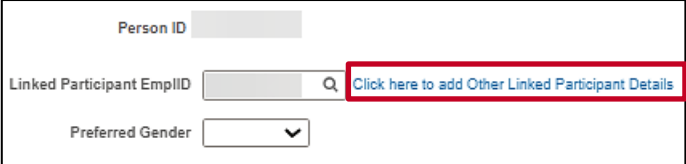
Step	Action
	The **VA Person Info** page displays.
16.	Enter the Employee ID of the Retiree to be linked in the **Linked Participant EmplID** field and tab out of the field.
	The Dependent's record is populated with the Linked Retiree's EmplID.

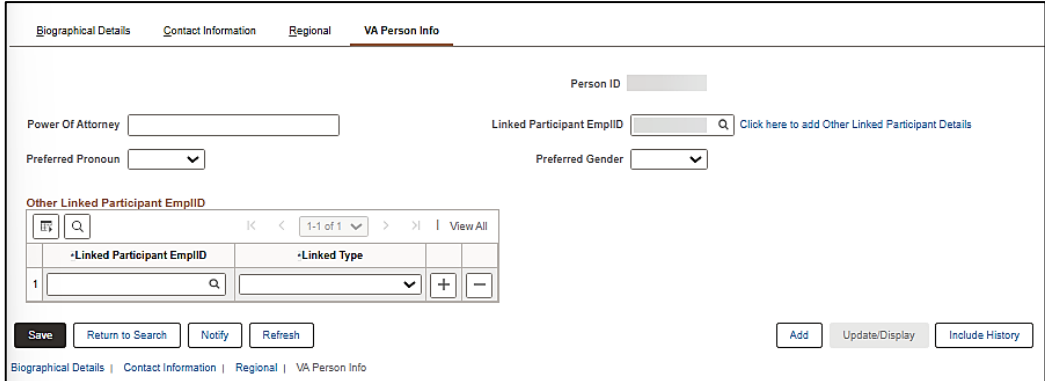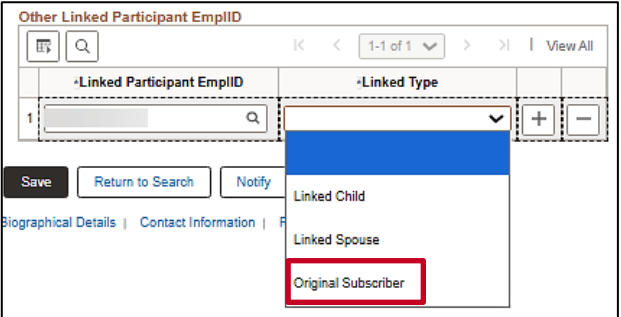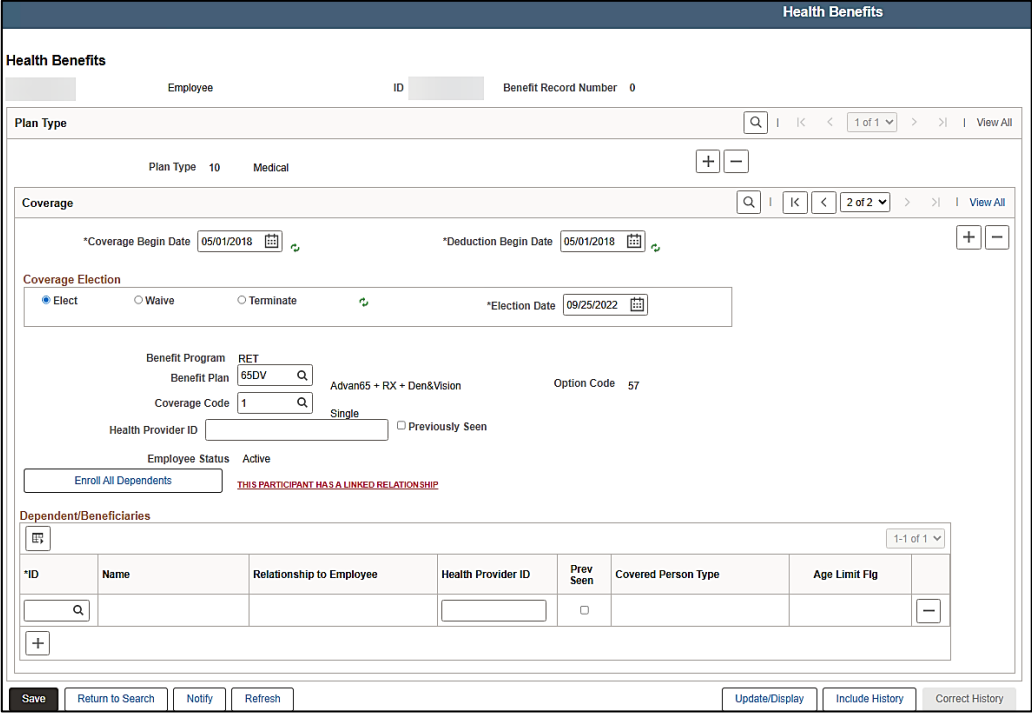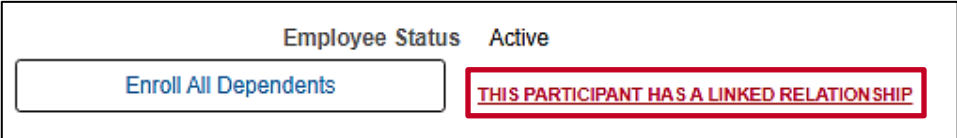| Step	Action
17.	Click the **Click here to add Other Linked Participants Details** link. Person ID [____] Linked Participant EmplID [____] 🔍 Click here to add Other Linked Participant Details Preferred Gender [____ ▾]
	The **VA Person Info** page redisplays with the **Other Linked Participants** section available. Biographical Details Contact Information Regional VA Person Info Person ID [____] Power Of Attorney [____] Linked Participant EmplID [____] 🔍 Click here to add Other Linked Participant Details Preferred Pronoun [____ ▾] Preferred Gender [____ ▾] Other Linked Participant EmplID 🔍 K < 1-1 of 1 ▾ > >I View All •Linked Participant EmplID	•Linked Type 1 [____] 🔍	[____ ▾] ➕ ➖ Save Return to Search Notify Refresh Add Update/Display Include History Biographical Details	Contact Information	Regional	VA Person Info
18.	Enter the Employee ID of the Retiree to be linked in the **Linked Participant EmplID** field. Other Linked Participant EmplID 🔍 K < 1-1 of 1 ▾ > >I View All •Linked Participant EmplID	•Linked Type 1 [____] 🔍	[____ ▾] ➕ ➖
19.	Click the **Linked Type** dropdown button and select "Original Subscriber". Other Linked Participant EmplID 🔍 K < 1-1 of 1 ▾ > >I View All •Linked Participant EmplID	•Linked Type 1 [____] 🔍	[____ ▾] ➕ ➖ [(blank)] Linked Child Linked Spouse Original Subscriber Save Return to Search Notify Biographical Details	Contact Information	F
20.	Click the **Save** button. Save Return to Search Notify Refresh
21.	Repeat **Steps 12 – 20** for each Linked Dependent.

Step	Action
ℹ	The Linked Dependent relationship can now be viewed directly from the **Health Benefits** page.

22.	Click the **THIS PARTICIPANT HAS A LINKED RELATIONSHIP** link.

A new Cardinal tab opens that navigates to the **VA Person Info** page where additional Dependent details can be reviewed.