

HUMAN CAPITAL MANAGEMENT

Benefits WorkCenter and Important Changes to the Life Event Document Submittal Process

August 19, 2026



Agenda

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Welcome & Cardinal Upgrade Overview

02

Benefits WorkCenter

03

New Features

04

Live Demonstration

05

Wrap-up and Question & Answer

Welcome to Today's Webinar!

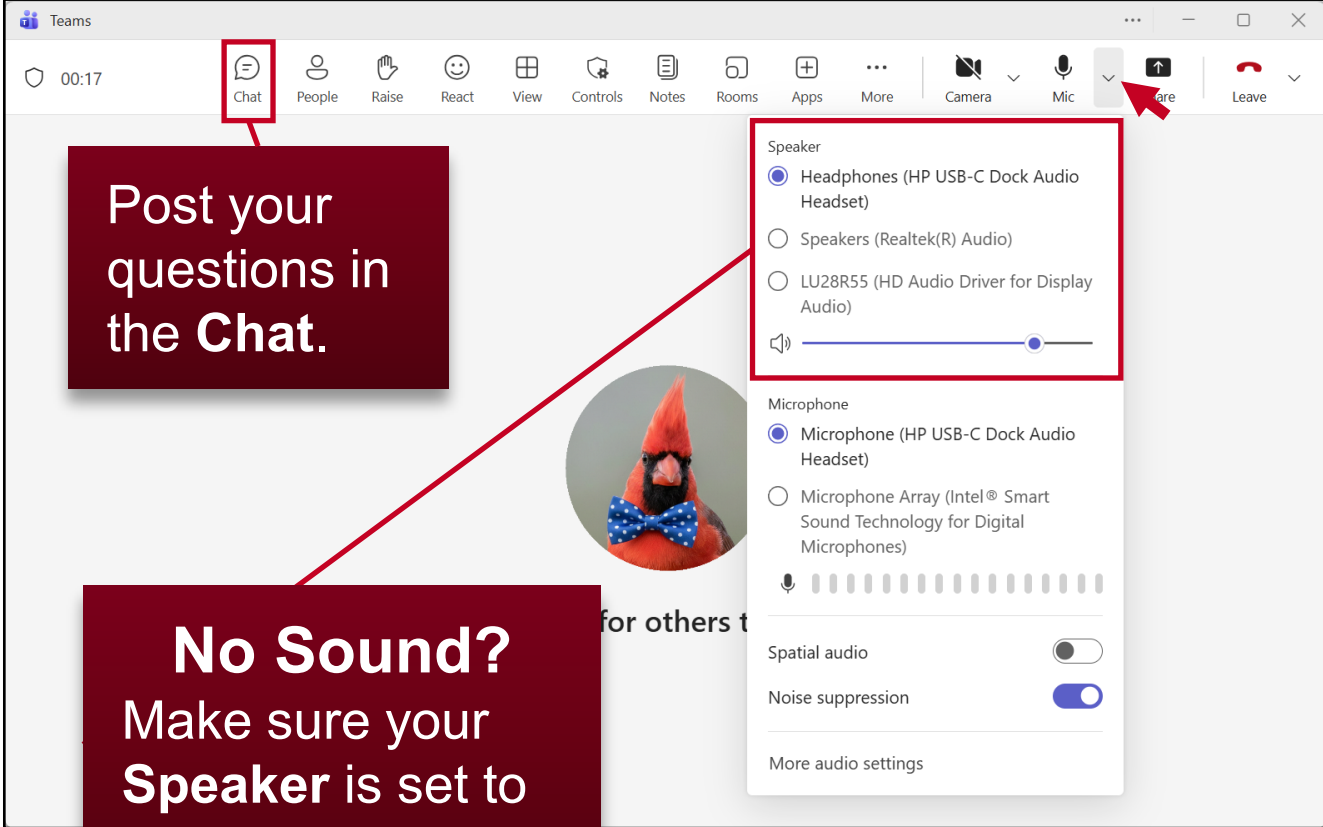
Q&A Format

Post your questions in the Chat.
While we may not answer every question during today's session, all inquiries will be captured for follow-up.

Agency-Specific Questions

Will **not** be addressed today – please open a ticket instead.

All attendees have been muted.



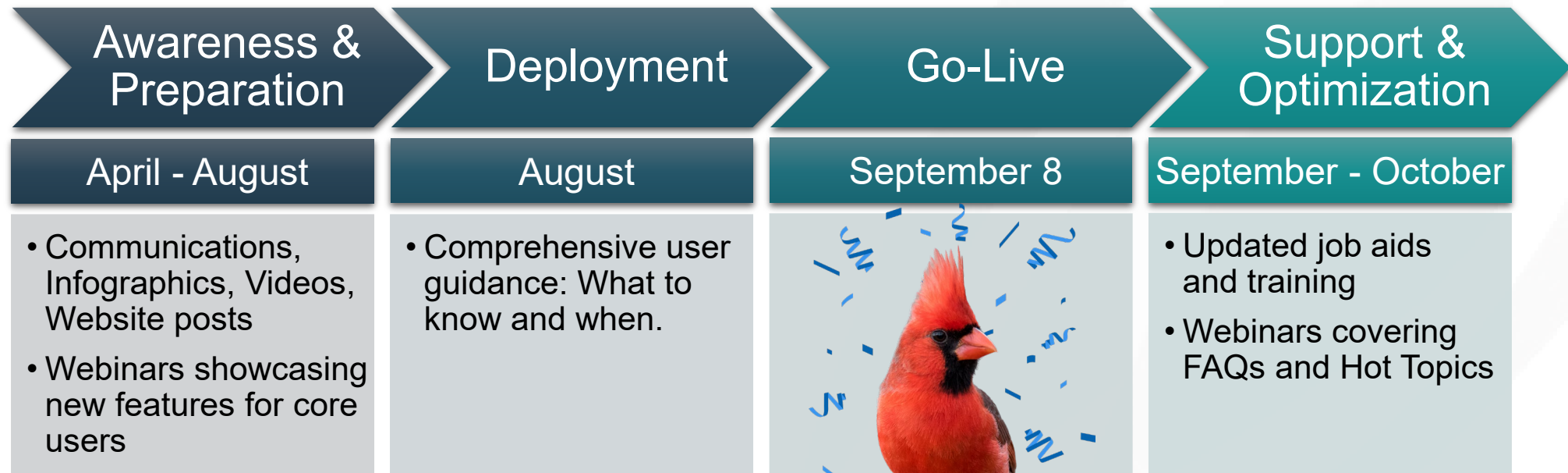
The screenshot shows the Microsoft Teams interface. At the top, the 'Chat' icon is highlighted with a red box. A red callout box points to it with the text: "Post your questions in the Chat." On the right side, the 'More' menu is open, showing the 'Speaker' and 'Microphone' settings. The 'Speaker' section has three options: 'Headphones (HP USB-C Dock Audio Headset)' (selected), 'Speakers (Realtek(R) Audio)', and 'LU28R55 (HD Audio Driver for Display Audio)'. A red arrow points to the 'Speaker' dropdown menu. Below the speaker settings, the 'Microphone' section shows 'Microphone (HP USB-C Dock Audio Headset)' as the selected device. A red callout box points to the microphone settings with the text: "No Sound? Make sure your Speaker is set to the correct device." The background of the Teams window shows a video feed of a person wearing a red cardinal hat and a blue bow tie.

What to Expect in This Webinar

- ✓ This session highlights new features and changes in the Cardinal Upgrade. It is an informational overview, not a formal training class.
- ✓ If we have not discussed a particular Cardinal function in today's webinar, it is likely unchanged as part of the upgrade.
- ✓ Agency users will not have access to a training environment to preview the upgraded system.
- ✓ All job aids, training, and support materials are being updated and will be made available before the upgrade.
- ✓ Retaking completed Cardinal training is **not required**.
- ✓ **This session is being recorded.** The recording will be made available shortly after the event.

What is the Cardinal Upgrade?

- The Cardinal team is enhancing the Financials (FIN) and Human Capital Management (HCM) applications.
- This upgrade will deliver a range of new features designed to improve system functionality and your overall user experience.
- Scheduled to go live on **September 8, 2026**.



Cardinal Upgrade: Impact on Your Favorites

As Cardinal transitions to a modern navigation experience, existing personalizations and favorites may be linked to pages or menu items that no longer exist. Please note the following impacts on your saved items:

- **Homepage Personalization and NavBar Favorites:** Automatically removed at go-live due to the new navigation structure.
 - A communication will go out to all users with instructions about re-creating favorites in the upgraded system.
- **Queries & Run Controls:** Existing favorite queries and Run Control IDs will remain intact—no action required.

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New Features

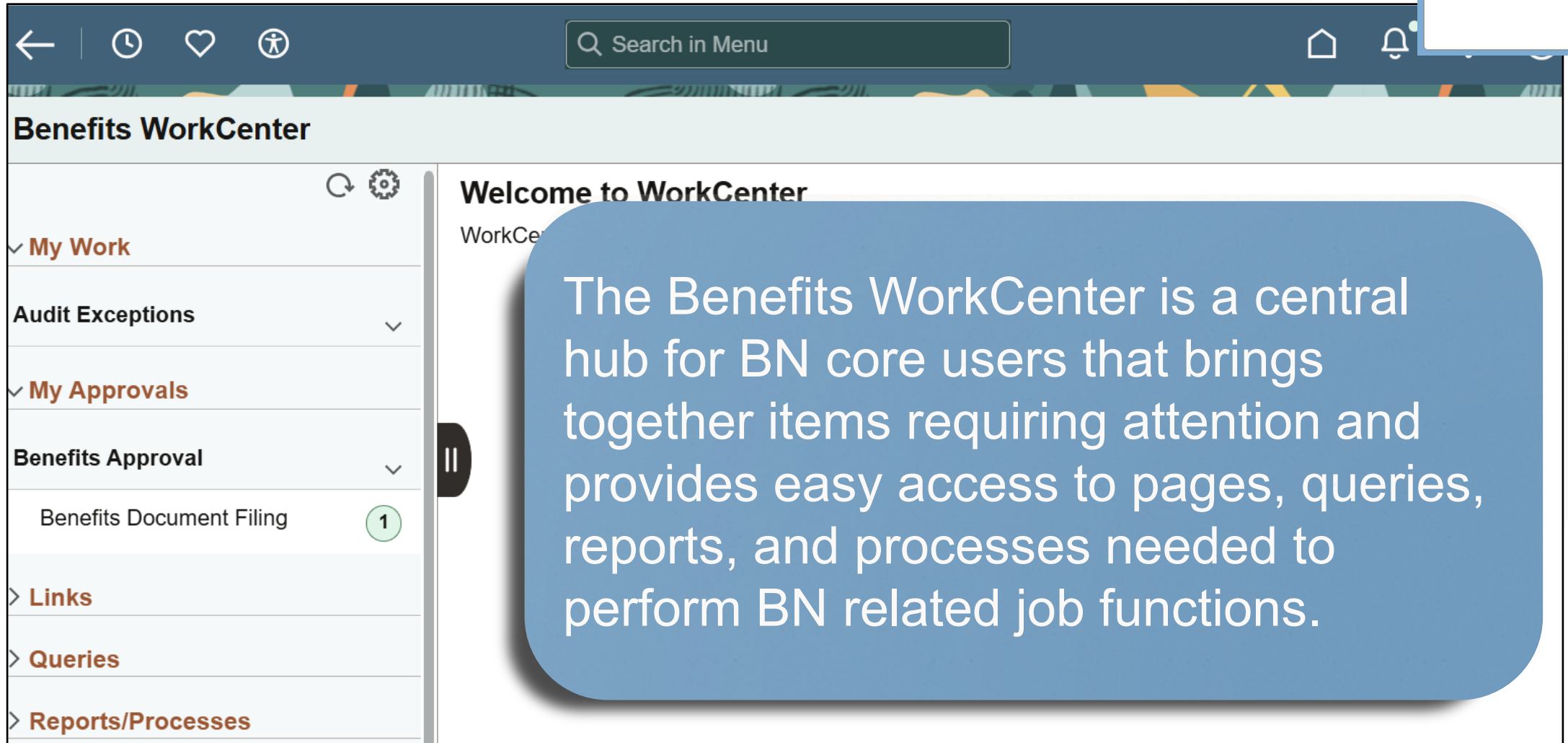
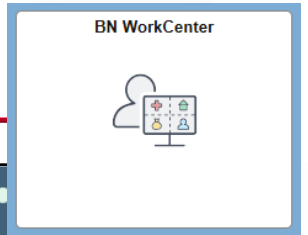
04

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Benefits WorkCenter



The Benefits WorkCenter is a central hub for BN core users that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform BN related job functions.

Benefits WorkCenter

The screenshot shows the Benefits WorkCenter interface. At the top is a navigation bar with icons for back, clock, heart, person, search, home, notifications, and settings. Below the navigation bar is the 'Benefits WorkCenter' header. The main content area is divided into a left sidebar and a main workspace. The sidebar contains five sections: 'My Work' (checked), 'My Approvals' (checked), 'Links', 'Queries', and 'Reports/Processes'. Each section has a dropdown arrow. The 'My Work' section shows 'Audit Exceptions'. The 'My Approvals' section shows 'Benefits Approval' and 'Benefits Document Filing' (with a green circle containing the number 1). The 'Links', 'Queries', and 'Reports/Processes' sections are currently collapsed. The main workspace displays a 'Welcome to WorkCenter' message. Five callout boxes with red lines pointing to the sidebar sections provide descriptions: 'My Work' is a 'To-Do' list; 'My Approvals' is a queue for Life Event Documents; 'Links' provides direct navigation to frequently visited task pages; 'Queries' allows running BN queries directly; and 'Reports/Processes' provides direct access to common BN reports and automated system processes.

My Work: Your “To-Do” list. Centralizes all items requiring immediate action or attention.

My Approvals: Dedicated queue for Life Event Documents or pending requests.

Links: Direct navigation to your most frequently visited day-to-day task pages.

Queries: Run BN (benefits) queries directly within the workspace.

Reports/Processes: Direct access to common BN reports and automated system processes.

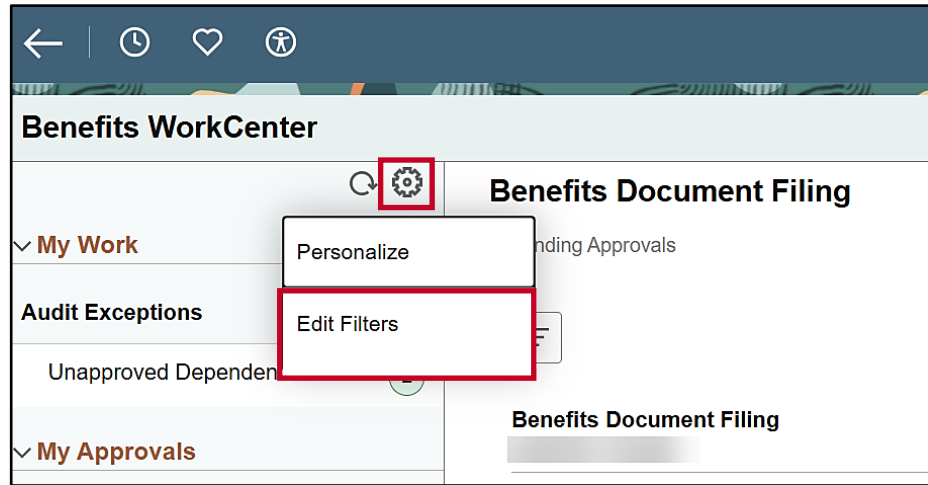
Benefits WorkCenter, Continued

My Approvals: Review and approve all pending Life Event documents within this menu. Benefit Enrollment is locked for the ESS user until document approval is complete.

The screenshot displays the Benefits WorkCenter interface. At the top, there is a navigation bar with icons for back, clock, heart, person, search, home, notifications, and a menu icon. Below the navigation bar, the main header reads "Benefits WorkCenter". On the left side, there is a sidebar menu with the following items: "My Work", "Audit Exceptions", "My Approvals", "Benefits Approval", and "Benefits Document Filing". The "Benefits Document Filing" item is highlighted with a red border and a green circle containing the number "1". The main content area is titled "Benefits Document Filing" and shows "Pending Approvals". Below this, there is a table with one row of data:

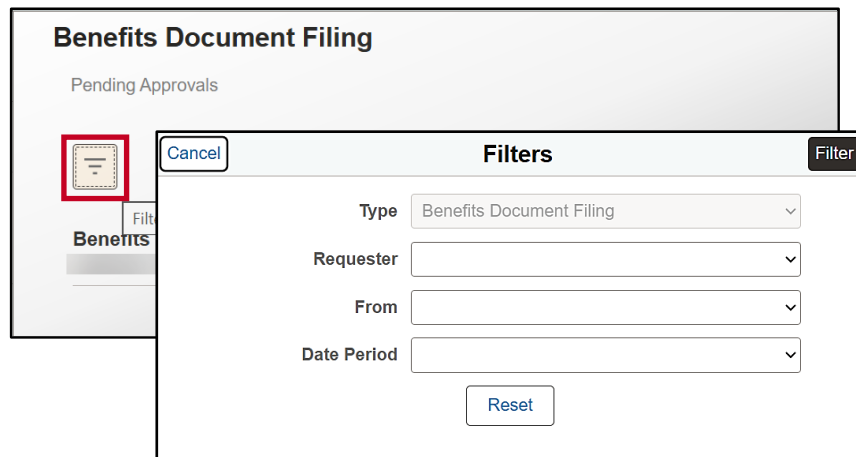
Benefits Document Filing			Life Event	Routed	1 row
JOHN DOE	Divorce	05/01/2026	>		

WorkCenter Filters



Set Default Filters

Users may update the pre-set filters using the **Edit Filters** available in the Navigation panel. This is saved and will be applied every time the user accesses the WorkCenter.



Set Temporary Filters

While working with a category, a user may refine the filter in the Transaction panel to temporarily focus on a particular Business Unit(s) or other criteria by using the **Refine Filter** option.

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What's Changing?

Additional benefits enhancements coming with the Cardinal Upgrade



Online Documents

Electronic submission of Life
Event Documents



ESS Benefits Tiles

New look to ESS Benefits Pages



Mobile Functionality

Access to Benefit functions on
smartphones and tablets

Submitting Life Event Documents via ESS

Document uploading will become a required step in the ESS Life Event sequence.

- Employees see a checklist of required documents specific to their Life Event, including upload and approval statuses.
- The employee selects the document type and uploads files directly from their device into ESS.
- Upon submission, the documents are in the Benefits Administrator's queue for review and approval.
- Coverage changes will not be processed until the Benefits Administrator approves.

Fluid Document Upload

Event Value: Marriage

~Instructions

You are required to submit the document(s) listed in the Document List. Select the Add Attachment button to upload your document.

~Document List

Document	Upload / Status	Approval / Status
Marriage Certificate	Required Uploaded	Required Pending Approval
Social Security Card Copy	Required Attachment Missing	Not Required
Miscellaneous Documents Prior Year Tax Return Copy Utility Bill Copy Bank Statement	Require at least one Attachment Missing	Not Required

Add Document

*Document Type: Marriage Certificate

Add Attachment Add Note

View Document

View All ☒

Document Name Description

Fluid Document Upload

Event Value: Marriage

~Instructions

You are required to submit the document(s) listed in the Document List. Select the Add Attachment button to upload your document.

~Document List

Document	Upload / Status	Approval / Status
Marriage Certificate	Required Uploaded	Required Pending Approval
Social Security Card Copy	Required Attachment Missing	Not Required
Miscellaneous Documents Prior Year Tax Return Copy Utility Bill Copy Bank Statement	Require at least one Attachment Missing	Not Required

Add Document

*Document Type: Marriage Certificate

Add Attachment Add Note

Working with Life Event Documents as a BA

BAs will review and approve or reject Life Event Documents before the employee can submit any enrollment changes.

Benefits WorkCenter

Search in Menu

My Work

Audit Exceptions

My Approvals

Benefits Approval

Benefits Document Filing 1

Links

Queries

Reports/Processes

Benefits Document Filing

Pending Approvals > Header

1 line(s) are pending your approval

Approve Deny

Summary

Event Name Life Event: Adoption

Effective Date 05/25/26

Benefits Documents Details

Pending All

Select	Attachment Type	Subject	Created Date	Attached File
☐	Final Adoption Agreement	eligible-active-employees-and-family-members.pdf	05/29/26 - 11:30 AM	eligible-active-employees-and-family-members.pdf

Approver Comments

Approval Chain

Benefits Document Filing

Pending Approvals > Header > Line

Benefits Documents Line Details

Created Date 05/29/26 - 11:30 AM

Authorization Entry ID BN_ADOPTCERT

Subject eligible-active-employees-and-family-members.pdf

Attachment eligible-active-employees-and-family-members.pdf

View Attachment

Employee Self-Service Benefit Details Tile & Pages

What changes after the upgrade?

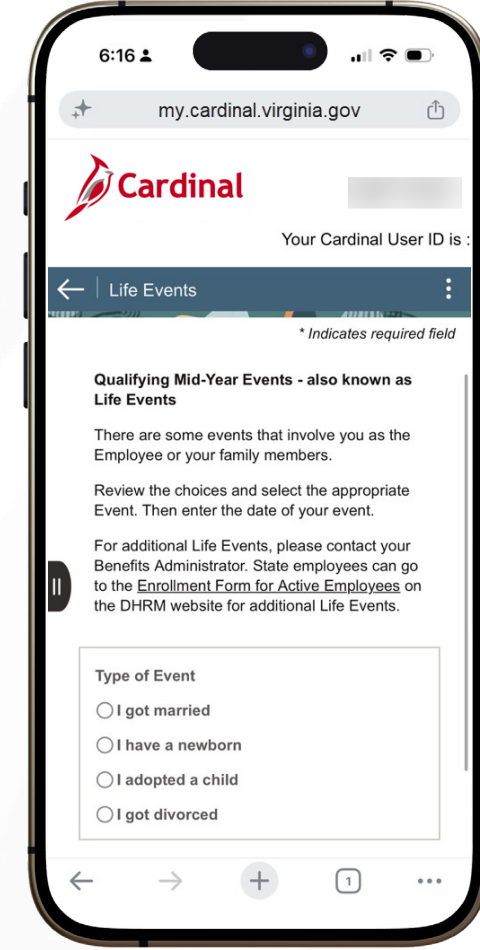
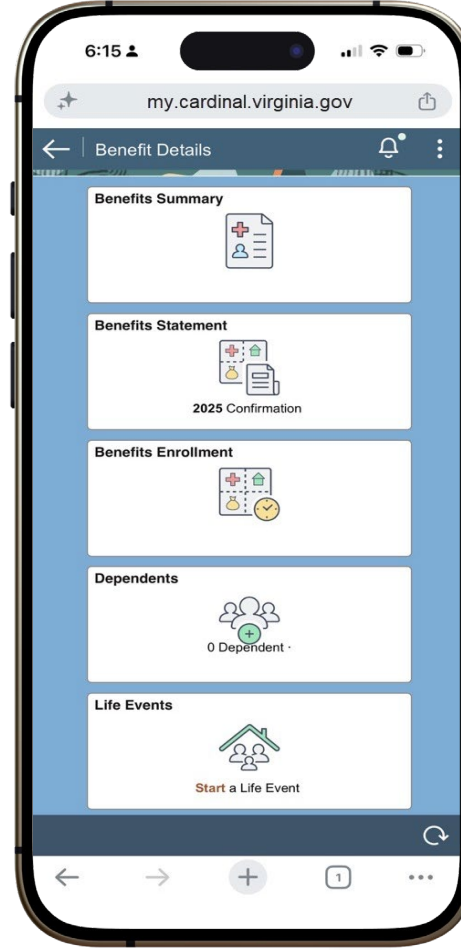
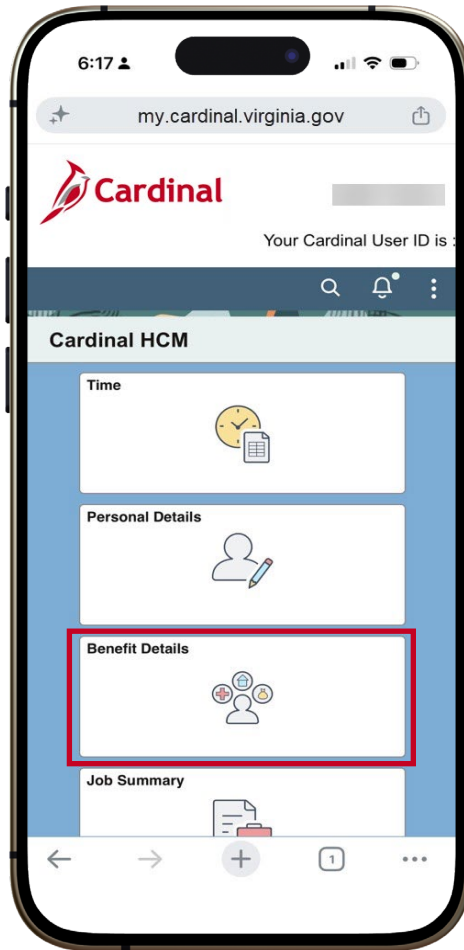
- Users still click the Benefit Details Tile, but the landing page layout changes.
- Users can upload required documents for Life Events.
- Navigation to Benefits Summary, Statements, and Enrollment is through icons rather than a sidebar.
- Cleaner layout improves readability on mobile devices.

Today – Current ESS Benefit Tile View

Type of Benefit	Plan Description	Coverage or Participation
Medical	COVA Cr+Exp Den+Vision&Hrng	Family

After Upgrade – ESS Benefit Details Tile View

Mobile Functionality



LIVE DEMONSTRATION

BN (Benefits) WorkCenter





Q & A

Next Steps

EXPLORE THE CARDINAL UPGRADE WEBPAGE

 cardinalproject.virginia.gov/upgrade



Communications & Infographics



Videos



Webinar Recordings & Presentations



Go-Live Resources

Share Your Feedback!

Scan the QR code or click the link below to take a brief survey.



<https://forms.office.com/g/mn8Qni7PzF>

Important Job Data and Position Data Changes

With the Cardinal Upgrade, the look and feel of the Job Data and Position Data pages is substantially changing!

The updated HR353 Reviewing the Human Resources Read-Only Pages Job Aid is available now on the Upgrade page of the Cardinal website.

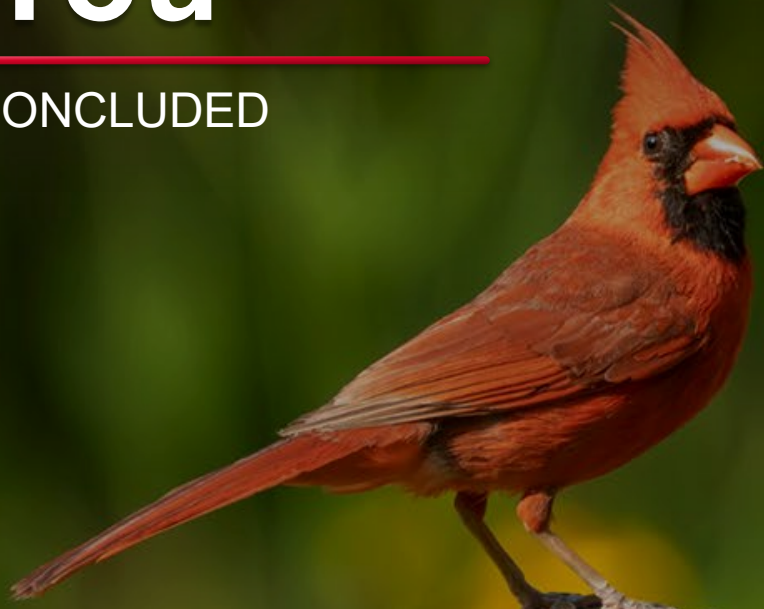
Additional information will be available later this summer, including:

- Communication announcing these changes
- Updated HR353 HR Read-Only Web-based Training

The Cardinal Team strongly encourages you to review these materials prior to the Upgrade Go-Live.

Thank You

PRESENTATION CONCLUDED



We Value Your Feedback!

Scan the QR code or click the link below to take a brief survey.



<https://forms.office.com/g/mn8Qni7PzF>

A copy of this presentation and the recording will be sent to all attendees and invitees.

www.cardinalproject.virginia.gov