

#### Managing BA Contacts Overview

This Job Aid provides the steps utilized by Agency Benefits Administrators to manage the BA Contacts for their Business Unit/Group ID(s). It is critically important that the BA Contacts are maintained accurate within Cardinal. When employees make changes via Employee Self-Service (ESS), a notification is sent to the Benefits Administrator Contact Type.

**Note**: Cardinal recommends using a shared email address or distribution list to allow for notifications to be sent to a broader group of individuals. This Job Aid contains sections that provide the step-by-step instructions used to complete the following:

- · Add a new BA Contact
- · Edit an existing BA Contact
- · Delete an existing BA Contact

This Job Aid does not apply to Agencies participating in The Local Choice Health Benefits Program (TLC). Localities enrolled in TLC should refer to the Job Aid titled **BN361\_TLC Data Sheet Locality**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

**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 and 3; <u>Section 2</u> , after Step 1 and 3; <u>Section 3</u> , after Step 1 and 3). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



#### Adding a New BA Contact

This section of the Job Aid should be used when adding a new BA Contact for a Business Unit/Group ID. There are six types of contacts that can be defined. Please note that each Contact Type is limited to one person.

Step	Action
1.	Navigate to the <b>BA Contacts</b> page using the following path:
	NavBar > Menu > Benefits > Employer Information > BA Contacts
The <b>BA C</b>	contacts Find an Existing Value page displays
(	Cardinal Homepage BA Contacts
ВА	Contacts
Fi	nd an Existing Value
En	Search Criteria ter any information you have and click Search. Leave fields blank for a list of all values.
	Recent Searches Choose from recent searches
	Search by: Business Unit  begins with
	Show more options     Include History      Correct History
	Search Clear
	For more information partaining to the Cardinal HCM Search pages, refer to the Job Aid titled
1	"Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal
	Website in <b>Job Aids</b> under <b>Learning</b> .
2.	Enter the applicable Business Unit in the <b>Business Unit</b> field.
	Search by: Business Unit  begins with
3.	Click the <b>Search</b> button.
	Clear



The page refreshes and the search results display at the bottom of the page.	Step	Action							
Search Results         4 results - Business Unit "10100"         Image: Contract of the con	The page	refreshes and the sear	ch results display at the bottom of the	page.					
Image: Contract of the contract	<ul> <li>✓ Search Results</li> <li>4 results - Business Unit "10100"</li> </ul>								
Business Unit         Group ID         Image: Control of the control o			< 1-4 of 4 v	> >     View All					
10100       101002000       >         10100       101003000       >         10100       101005000       >         10100       101102000       >         10100       101102000       >         4.       Click the Drill In icon (>) for the corresponding Group ID.         ✓ Search Results       4 results - Business Unit "10100"         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Image: Subject of the corresponding Group ID       Image: Subject of the corresponding Group ID         Ima		Business Unit	Group ID						
10100       101003000       >         10100       101005000       >         10100       101102000       >         4.       Click the Drill In icon (>) for the corresponding Group ID.         Search Results       4 results - Business Unit "10100"         Image: Search Results       Image: Search Results         Image: Image: Search Results       Image: Search Results         Image: Image: Image: Search Results       Image: Search Results         Image: Ima		10100	101002000	>					
10100         101005000         >           10100         101102000         >           4.         Click the Drill In icon (>) for the corresponding Group ID.           • Search Results         4 results - Business Unit "10100"           • Search Results         14 of 4 ~> >   View All           Business Unit         Group ID           10100         101002000           10100         101002000           10100         101002000           10100         101002000           10100         101002000           10100         101002000           10100         101002000           10100         101002000           10100         101002000           10100         101002000		10100	101003000	>					
10100         101102000         >           4.         Click the Drill In icon (>) for the corresponding Group ID.            Search Results         4 results - Business Unit "10100"            Image: I		10100	101005000	>					
4.       Click the Drill In icon (>) for the corresponding Group ID.         ✓ Search Results       4 results - Business Unit "10100"         ✓ ( 14 of 4 √ > >) / View All         Business Unit       Group ID         10100       101002000         10100       101003000         10100       101005000         10100       101102000         10100       101102000         10100       101102000         10100       101102000         Each Group ID must be updated individually.		10100	101102000	>					
Business Unit         Group ID           10100         101002000           10100         101003000           10100         101005000           10100         1011002000           10100         101005000           10100         101102000           Each Group ID must be updated individually.		✓ Search Results 4 results - Business Unit "10100"							
Business Unit         Group ID           10100         101002000           10100         101003000           10100         101005000           10100         101005000           10100         101102000           Each Group ID must be updated individually.			< <	4 View All					
10100       101002000       >         10100       101003000       >         10100       101005000       >         10100       101002000       >         10100       101102000       >         Each Group ID must be updated individually.		Business Unit	Group ID						
10100       101003000       >         10100       101005000       >         10100       101102000       >         Each Group ID must be updated individually.		10100	101002000	>					
10100         101005000         >           10100         101102000         >           Each Group ID must be updated individually.		10100	101003000	>					
10100     101102000       Image: Sector of Computing Sector of Computer Sector of Computer Sector		10100	101005000	>					
Each Group ID must be updated individually.		10100	101102000	>					
Each Group ID must be updated individually.									
•	i	Each Group ID must b	be updated individually.						



Step	Action				
The <b>BA Contacts</b> page displays for the applicable Group ID.					
	Cardinal Homepage BA Contacts	🏫 Q. I 🕑			
	BA Contacts	New Window   Help   Personalize Page -			
	Business Unit: 10100 House of Delegates Group ID 101003000 House of Delegates Q I 4 1 tof 2 V View All				
	Effective Date 03/31/2022 📾 + -				
	Contacts Q I I d d Tord > > > > > > > > > > > > > > > > > > >				
	Contact EIN Q. Name Email ID				
	Enter a complete phone number including the area code.				
5.	Click the Add a New Row (+) icon to add a new effective	e dated row.			
	Q I4 4 1 of 2 ▼ ▶ ↓ View	All			
	Effective Date 03/31/2022	-			
The page	e refreshes with a new effective dated row.				
	Cardinal Homepage BA Contacts	r 🤉 🤅 🙆			
	BA Contacts	New Window   Help   Personalize Page -			
	Business Unit: 10100 House of Delegates Group ID 101003000 House of Delegates Q 4 1 tot3 V View All				
	Effective Date D6/13/2023 🛗 🕂 -				
	Contacts Q, I H 4 10/4 + H I View Al				
	Contact Type Benefits Administrator				
	Name				
	Email ID Phone Ext				
	Enter a complete phone number including the area code.				
6.	The <b>Effective Date</b> field defaults to the current system date <b>Effective Date Calendar</b> icon.	ate. Update as needed using the			
	Effective Date 06/13/2023				



Step	Action
7.	Add a Contact Type for the new BA Contact. Click the <b>Add a New Row</b> (+) icon within the <b>Contacts</b> section.
	Contacts         Q         I         I         I         I         View All
	Contact Type Benefits Administrator
The page	refreshes with the new row.

Business Unit:	10100 House of Delegates	
Group ID	101003000 House of Delegates	
	Q I I of 3 ▼ ► View All	
Effective Date	06/13/2023	
Lineouve Date		
Contacts	Q I I I I I View All	
*Contact Type	· + -	
Contact FIN		
Name		
Email ID		
Phone	Ext	
Enterior		
Enter a com	plete prone number including the area code.	

The **Contact Type** menu displays.

Group ID	101003000 House of Delegates	
	Q I I of 3 🗸 🕨 View All	
Effective Date	06/13/2023	
Contacts	Q,    4 4 2 of 5 - + +   View All	
*Contact Type	· · · ·	
Contact EIN	Benefits Administrator	
Name	Billing Administrator	1
Email ID	HR Administrator	
Phone	Ext	



Step	Action
9.	Select the applicable Contact Type by clicking the corresponding list item based on the following:
	<ul> <li>The Benefits Administrator is the only required Contact Type and is the only contact who receives email notifications of updates made to dependent information through Employee Self-Service (ESS)</li> </ul>
	<ul> <li>The Benefit Administrator, Benefits Executive, Billing Administrator, and Billing Executive Contact Type details are reported to DHRM</li> </ul>
	<ul> <li>The HR Administrator and HR Executive Contact Types are for informational purposes only in Cardinal</li> </ul>
	Benefits Administrator Benefits Executive Billing Administrator Billing Executive HR Administrator HR Executive
The <b>BA C</b>	contacts page redisplays.
	Cardinal Homepage BA Contacts
E	ffective Date 06/13/2023 📰 🛨 🗕
	Contacts Q I I 2 of 5 FI View All     "Contact IR Administrator   Type   Contact EIN   Q     Name   Email ID   Phone   Ext   Enter a complete phone number including the area code.   > Mailing Address   Add Include History
10.	Enter or select the applicable employee's Employee ID Number in the <b>Contact EIN</b> field.

Once entered, the **Name**, **Email ID**, and **Phone** fields will automatically populate. Skip to Step 12. If a shared email address is being used, do not populate the **Contact EIN** field. In this case, proceed with Step 11.

Q

i

Contact EIN



Step	Action		
11.	Enter the applicable employee's email address or the shared email address into the <b>Email ID</b> field.		
	Email ID		
12.	Expand the <b>Mailing Address</b> section and <b>Shipping Address</b> section and populate the address information as needed.           Mailing Address		
Sample w	ith completed data entry.		
	Carefond Housepage       BA Contacts         Group ID       101000000         Hasse of Delegates         Contacts       Q         Q       I         Contacts       Q         Contacts       Q         Contact Type       HR Administrator         Contact Type       HR Administrator         Contact Type       Ensil ID         Phone       Exi         Ensil ID       Exi         Ensil ID       Exi         Store       Name         Store       Name         Store       Name         Ensil ID       Exi         Ensil ID       Exi         Store       Exi         Ensil ID       Exi         Store       Previous In List         Name       Add         Include History		
13.	Click the <b>Save</b> button at the bottom of the page.		
i	Repeat these steps for each Group ID within the Business Unit to add the new BA Contact as needed.		



### **Editing an Existing BA Contact**

This section of the Job Aid should be used when editing the information for an existing BA Contact for a Business Unit/Group ID. This functionality can be used to edit information such as the BA Contact's phone number information and address information. A group email address can also be edited using this functionality.

Step	Action
1.	Navigate to the <b>BA Contacts</b> page using the following path: <b>NavBar &gt; Menu &gt; Benefits &gt; Employer Information &gt; BA Contacts</b>
The <b>BA C</b>	ontacts Find an Existing Value page displays.
(+	Cardinal Homepage BA Contacts
ВА	Contacts
Fi	nd an Existing Value
∼ En	Search Criteria ter any information you have and click Search. Leave fields blank for a list of all values.
	Precent Searches Choose from recent searches
	Search by: Business Unit  begins with Show more options Include History Clear Clear
İ	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 <b>Job Aids</b> under <b>Learning</b> .
2.	Enter the applicable Business Unit in the <b>Business Unit</b> field.
	Search by: Business Unit  begins with
3.	Click the <b>Search</b> button.
	Search Clear



Step	Action						
The page	refreshes and the sea	rch results display at the bottom of the p	age.				
<ul> <li>✓ Search Results</li> <li>4 results - Business Unit "10100"</li> </ul>							
		<	> >   View All				
	Business Unit	Group ID					
	10100	101002000	>				
	10100	101003000	>				
	10100	101005000	>				
	10100	101102000	>				
4.	Click the <b>Drill In</b> icon	(>) for the corresponding Group ID.					
	✓ Search Results 4 results - Business Unit "10100"						
		I< < 1-4 of 4	✓ > >   View All				
	Business Unit	Group ID					
	10100	101002000	>				
	10100	101003000	>				
	10100	101005000	>				
	10100	101102000	>				
1	Each Group ID must	be updated individually.					



Step	Action			
The <b>BA Contacts</b> page displays for the applicable Group ID.				
	Cardinal Homepage BA Contacts A C : O			
	BA Contacts			
	Business Unit: 10100 House of Delegates Group ID 101003000 House of Delegates			
	Q, If if 1 of 2 → F M View All			
	Effective Date 03/31/2022 m			
	Contacts         Q, 1         I         I of 4         I         View All			
	Contact Type Benefits Administrator			
	Name			
	Phone Ext			
	Enter a complete phone number including the area code.			
i	A new effective dated row must be created before making the required edits to the BA Contact information.			
5.	Click the Add a New Row (+) icon to add a new effective dated row.			
	I of 4 View All			
	+ -			
The page	refreshes with a new effective dated row.			
	< Cardinal Homepage BA Contacts			
	New Window   Help   Personalize Page - BA Contacts			
	Business Unit:     10100     House of Delegates       Group ID     101000000     House of Delegates			
	Q, 14 4 1 of 3 - H View All			
	Effective Date D9/13/2023 🗰 🛨 🗖			
	Contacts         Q, I H H         I of 4 ~         I H I View All			
	Contact Type Benefits Administrator			
	Name			
	Email ID			
	Priore Exc			
	uner a comprese priorie nomber including ete area code.			



Step	Action		
6.	The <b>Effective Date</b> field defaults to the current system date. Update as needed using the <b>Effective Date Calendar</b> icon.		
	Effective Date D6/13/2023		
7.	Click the View All link within the Contacts sections.		
	Contacts         Q, I         I         I of 4 ▾         I         I View All		
The page refreshes and all rows within the <b>Contacts</b> section are displayed. Scroll down to the Contact Type that requires editing.			
	C Cardinal Homepage BA Contacts ♠ Q. ; @		
	Poetal 22219		
	Centant type Billing Executive		
	Contact EIN Q, Name		
	Envil D Ent		
	Enter a complete phone number including the area code.		
	Mailing Address		
	Address 2		
	Store The second se		
	Save Return to Search Previous in List Next in List Add Include History		
	Edits can be made to the phone information or the address information. Group email		
	address information can also be edited. If edits are required to the name or Contact EIN, the		
	existing BA contact should be deleted and the new BA Contact should be added.		
8.	Click the <b>Save</b> button.		
	Save Return to Search Previous in List Next in List		
	Repeat these steps for each Group ID within the Business Unit to edit this BA Contact as		
	needed.		



#### **Deleting an Existing BA Contact**

This section of the Job Aid should be used when deleting an existing BA Contact for a Business Unit/Group ID.

Step	Action		
1.	Navigate to the <b>BA Contacts</b> page using the following path: <b>NavBar &gt; Menu &gt; Benefits &gt; Employer Information &gt; BA Contacts</b>		
The BA Contacts Find an Existing Value page displays.			
	Cardinal Homepage BA Contacts		
	BA Contacts		
	Find an Existing Value  Control Add a New Value		
	<ul> <li>✓ Search Criteria</li> <li>Enter any information you have and click Search. Leave fields blank for a list of all values.</li> </ul>		
	🔁 Recent Searches Choose from recent searches 🗸 🖉 🛛 Saved Searches Choose from saved searches 🗸		
	Search by: Business Unit  begins with Show more options Include History Clear Clear		
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 <b>Job Aids</b> under <b>Learning</b> .		
2.	Enter the applicable Business Unit in the <b>Business Unit</b> field.		
	Search by: Business Unit  begins with		
3.	Click the <b>Search</b> button.		
	Search Clear		



	Action		
bag	e refreshes and the sea	rch results display at the bottom of the page.	
	<ul> <li>✓ Search Results</li> <li>4 results - Business Unit "1</li> </ul>	10100''	
		I< < 1-4 of 4 → > >   View	v All
	Business Unit	Group ID	
	10100	101002000 >	
	10100	101003000 >	
	10100	101005000 >	
	10100	101102000 >	
	Click the <b>Drill In</b> icon (>)           Search Results           4 results           Business Unit "1	) for the corresponding Group ID.	
		< < 1-4 of 4 → > >    Viev	v All
	Business Unit	< < 1-4 of 4 → > >    View	v All
	Business Unit	I         <	v All
	Business Unit           10100           10100	I     I-4 of 4 v     >>I     View       Group ID     I01002000     >       101003000     >	v All
	Business Unit           10100           10100           10100	I     1-4 of 4 v     > >I     View       Group ID     101002000     >       101003000     >       101005000     >	v All
	Business Unit           10100           10100           10100           10100           10100	I     1-4 of 4 v     >>I     View       Group ID     101002000     >       101003000     >       101005000     >       101102000     >	v All



Step	Action		
The <b>BA Contacts</b> page displays for the applicable Group ID.			
	Cardinal Homepage BA Contacts A C		
	BA Contacts		
	Business Unit:     10100     House of Delegates       Group IID     101003000     House of Delegates		
	Q,  4  4   1 of 2 → ▶ ▶ View All Effective Date 03/31/2022 前		
	Contact Type Benefits Administrator Contact EIN Q		
	Name		
	Email ID Phone Ext		
	Enter a complete phone number including the area code.		
j	A new effective dated row must be created before making the required edits to the BA Contact information.		
5.	Click the Add a New Row (+) icon to add a new effective dated row.		
	I of 4 → ▶ ↓   View All		
	+ -		
The pa	ge refreshes with a new effective dated row.		
•	Cardinal Homepage BA Contacts A Q : (1)		
	New Window   Help   Personalize Page -		
	Business Unit: 10100 House of Delegates		
	Group ID 101000000 House of Delegates		
	Effective Date 09/13/2023 💼 + -		
	Contact EIN Q		
	Name		
	Phone Ext		
	Enter a complete phone number including the area code.		



Step	Action		
6.	The Effective Date field defaults to the current system date. Update as needed using the Effective Date Calendar icon.		
	Effective Date D6/13/2023		
7.	Click the View All link within the Contacts sections.		
	Contacts Q I Id d 1 of 4 V I View All		
The page of the contact	The page refreshes and all rows within the <b>Contacts</b> section are displayed. Scroll down to the BA Contact that needs to be deleted.		
	C Cardinal Homopage       € Cardinal Homopage     BA Contacts       State     VA       Postal     22319		
	Centart Type Bitro Excelue + -		
	Contact EIN Q		
	Phone Ext		
	Maling Address  Address		
	Address 2 City State		
	Postal		
	Same         Resurt to Search         Previous in List         Med in List         Add         Include History		
8.	Click the <b>Delete Row</b> icon (-) for the applicable BA Contact.		
	*Contact Type Billing Executive ~		
A <b>Confirmation</b> message displays in a pop-up window.			
	Delete current/selected rows from this page? The delete will occur when the transaction is saved.		
	Cancel		
9	Click the <b>OK</b> button to confirm the deletion.		
	OK		



Step	Action			
The <b>BA Contacts</b> page redisplays.				
	C Cardiol Homespage       BA Contlacts         Store       0         Pestal       2210         Contract Type       0         Contract Type       0			
i	The deleted BA Contact no longer displays.			
10.	Click the Save button.			
	Save Return to Search Previous in List Next in List			
i	Repeat these steps for each Group ID within the Business Unit to delete this BA Contact as needed.			