



HR352

**Cardinal HR and Benefits for HBO
Agencies and Decentralized Localities**

Instructor Led Training



Welcome to Cardinal Training

This training provides participants with the skills and information necessary to use Cardinal and is not intended to replace existing Commonwealth and/or agency policies.

The following HCM training materials are located on the Cardinal website (www.cardinalproject.virginia.gov) under Learning:

- Job Aids on topics across all functional areas
- Functional process and instructional videos

The Cardinal HCM Reports Catalogs are located on the Cardinal website under Resources.

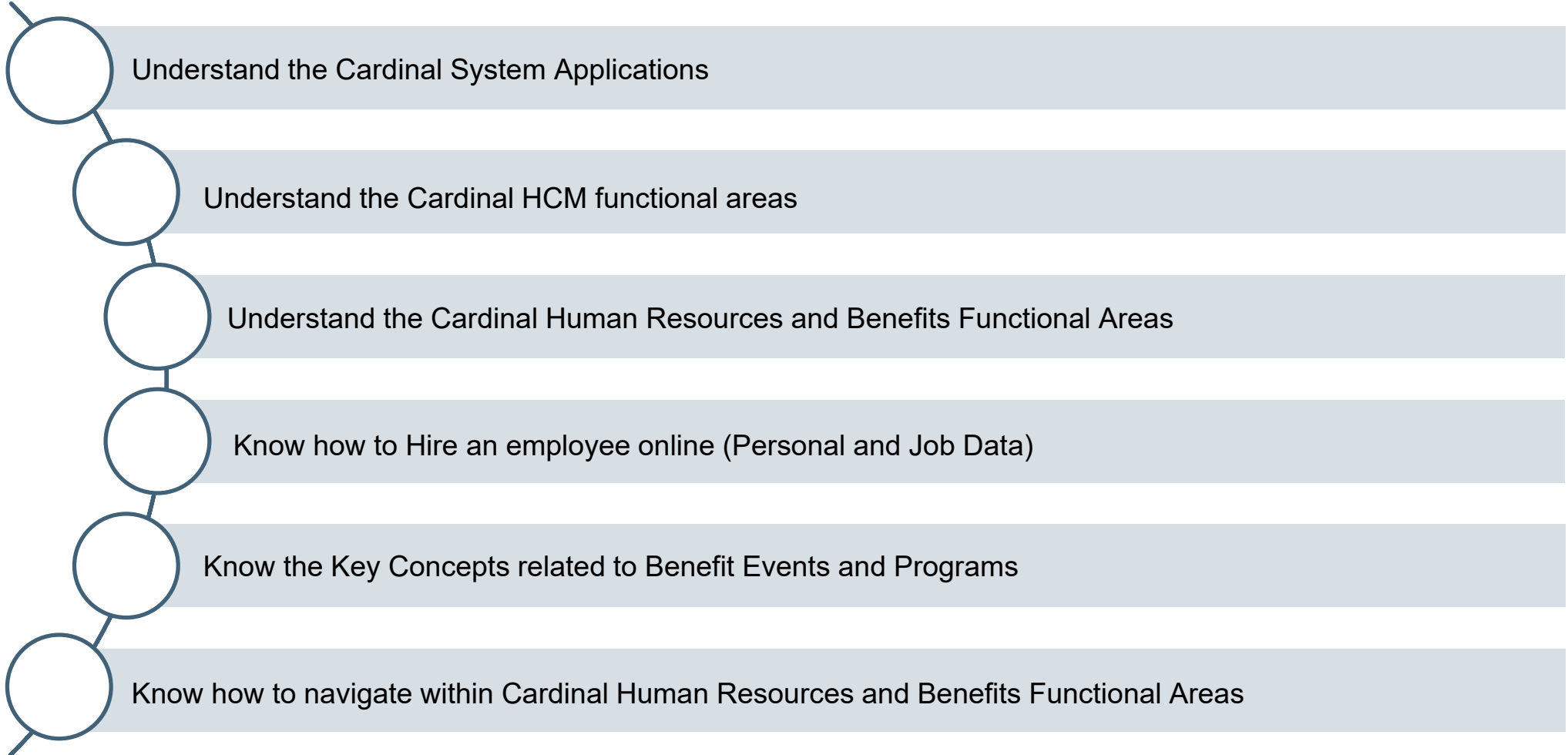
The system screenshots included in the Cardinal HCM training courses show system pages and processes that some users may not have access to due to security roles and/or how specific responsibilities relate to the overall transaction or process being discussed.

- For a list of available roles and descriptions, see the Statewide Cardinal Security Handbook on the Cardinal website in the Security section under Resources.



Course Objectives

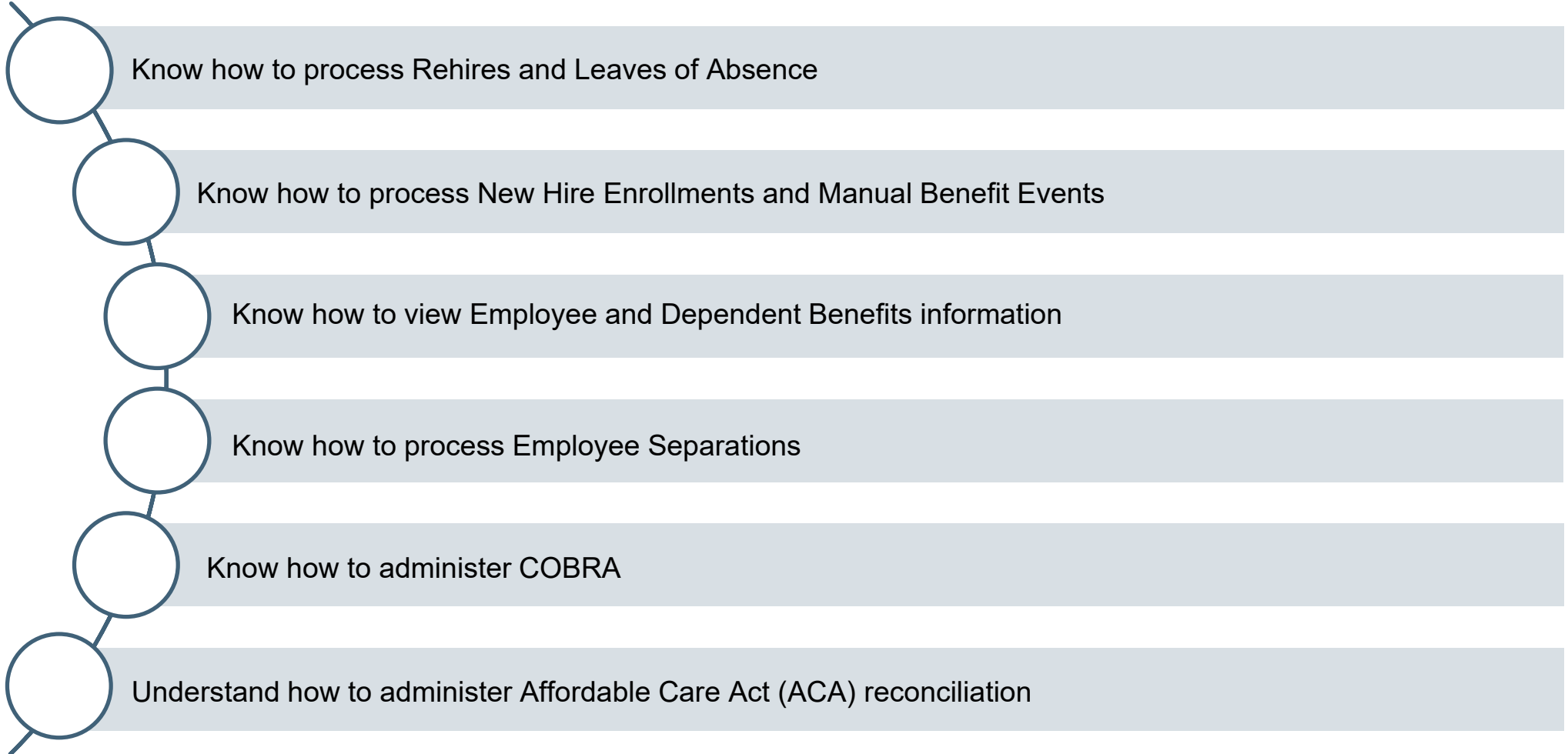
After completing this course, you will be able to:





Course Objectives

After completing this course, you will be able to:





Agenda

1

Overview of Cardinal HCM

2

HR Key Concepts

3

Setup Employee HR Data

4

Benefit Events and Programs

5

Benefits Navigation Overview

6

Processing New Hire Enrollments



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Processing Rehires and Leaves of Absence

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Processing Manual Benefit Events

9

Viewing Other Employee and Dependent Benefits Information

10

Processing Employee Separations

11

COBRA Administration

12

Affordable Care Act (ACA) Administration



Lesson

1

Overview of Cardinal HCM

This lesson covers the following topics:

- Overview of Cardinal HCM
- Overview of HCM Functional Areas:
 - Human Resource (HR)
 - Benefits (BN)
- Cardinal Effective Dating



Overview of Cardinal HCM

Cardinal provides better access to essential business functions and improved single sign-on technology.

The Cardinal system is comprised of two applications: Human Capital Management (HCM) and Financials (FIN).

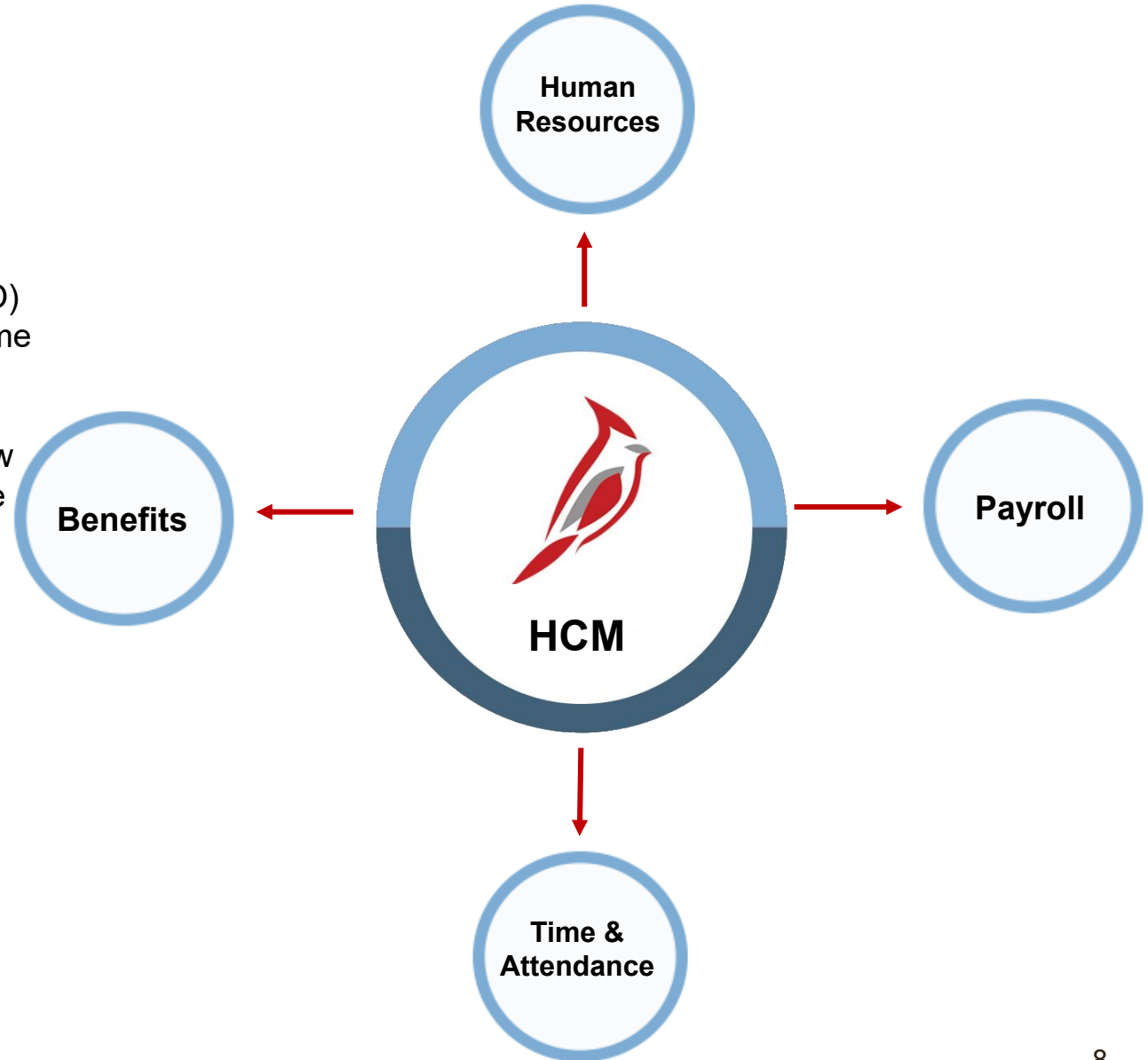




Cardinal Human Capital Management (HCM)

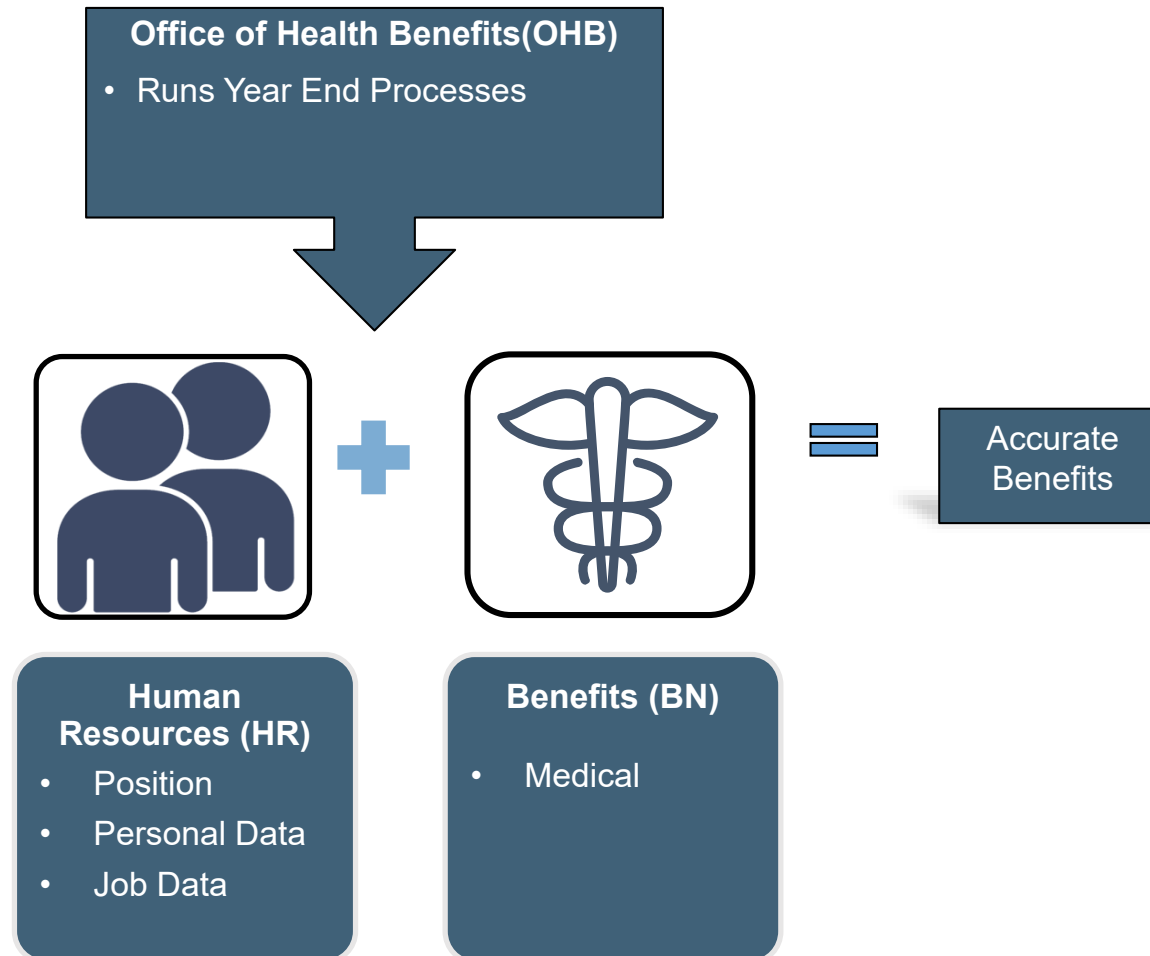
In Cardinal HCM, **HR Administrators**, **BN Administrators**, **TL Administrators**, **Payroll Administrators**, and **State Payroll Operations (SPO)** work together so that all employees are paid on time and accurately and are benefited properly.

All these roles and their unique responsibilities flow to one another in order to ensure that all employee records are accurate and up-to-date.





Cardinal HCM Responsibilities and Relationships





Cardinal HCM Human Resources

The Human Resources (HR) functional area contains all employee HR data related to the employee lifecycle. The business processes and sub-processes that make up the core HR functionality enable agencies to add and update:

- Position data (e.g., job code, department, location)
- Employee personal data (e.g., name, address)
- Employee job data (e.g., employee type)

HR data maintained in the Human Resources functional area feeds into and supports all other HCM functional areas.

The personal data record for an employee working in multiple agencies or HR Offices can be accessed by the applicable agency or locality.

The following HR business processes and sub-processes are part of Cardinal HCM:

- Hire/Rehire Employee
- Maintain Unpaid Leave Status
- Separate Employee

The data is utilized by the Benefits module to administer employee benefits.

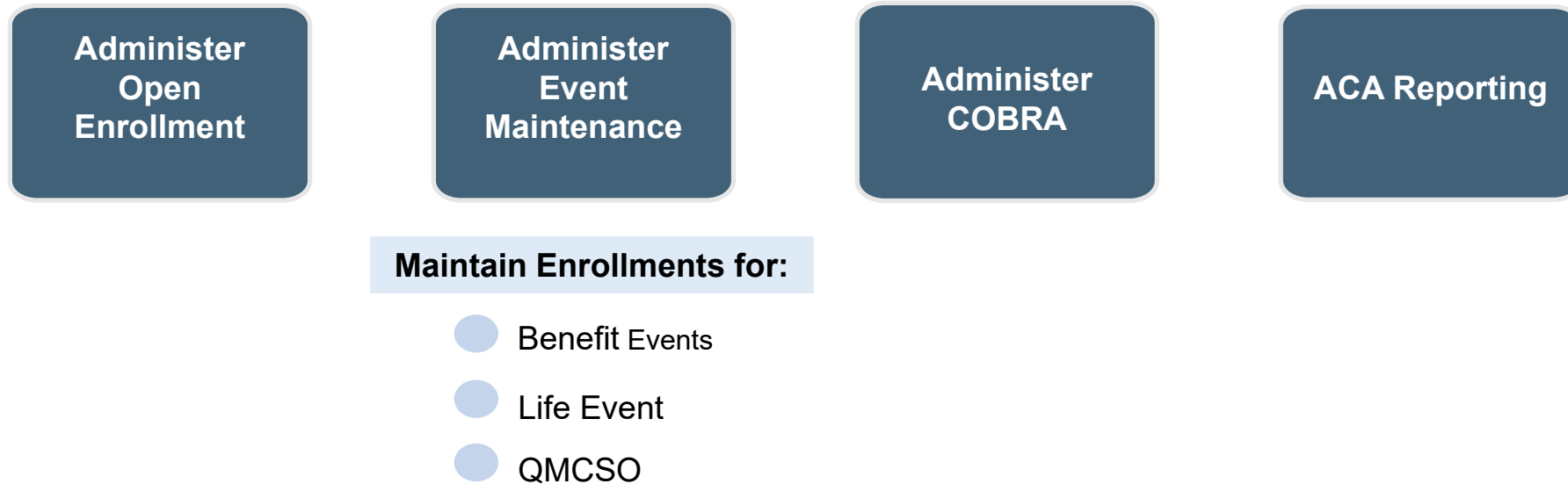




Overview of the Benefits Functionality

The Benefits functional area includes all processes and sub-processes required for maintaining benefits for the organization's employees and their dependents.

The Benefits processes and sub-processes are:



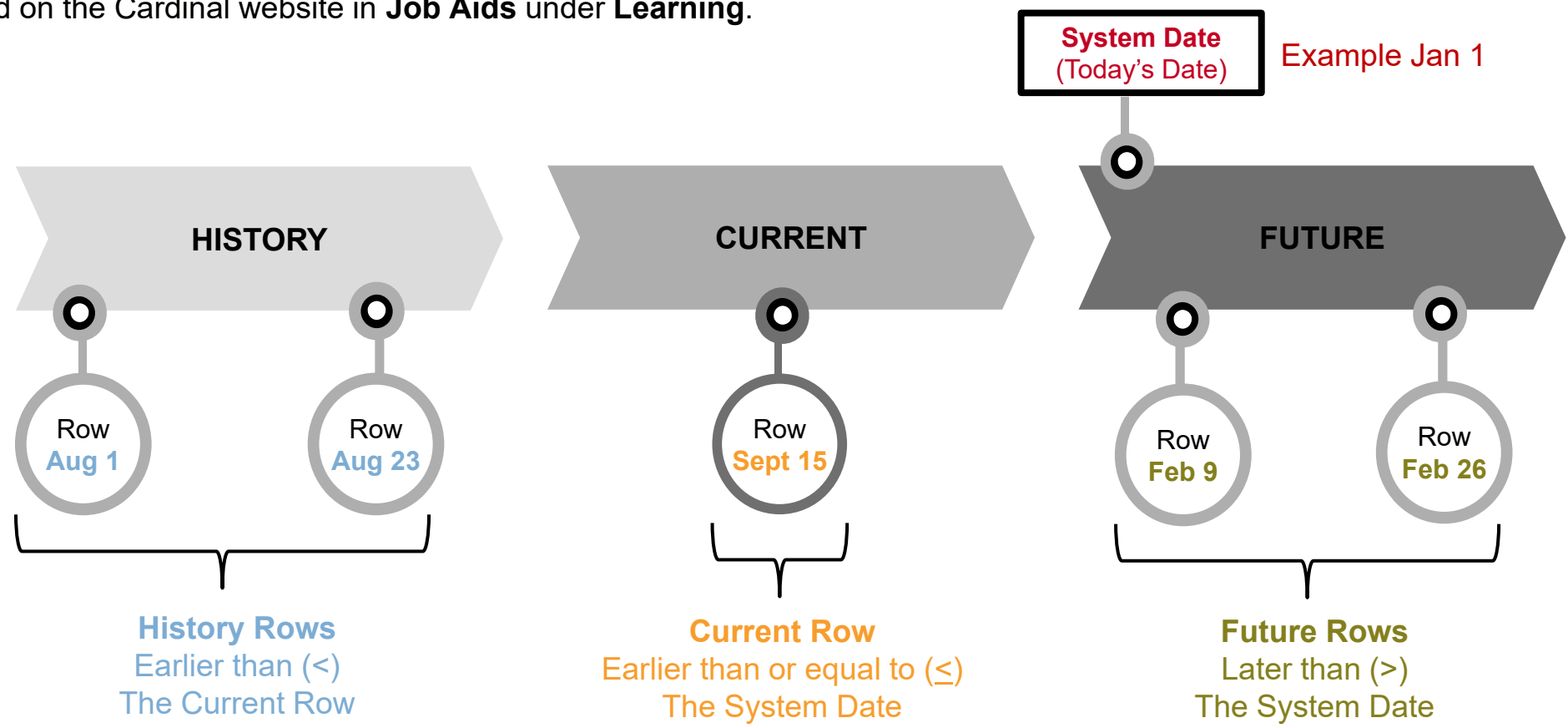


Cardinal Effective Dating

When entering new information related to existing data, such as a leave of absence, retaining the data already in the database is imperative. To retain history, insert a data row identified by a date that indicates when the new information goes into effect: an effective date.

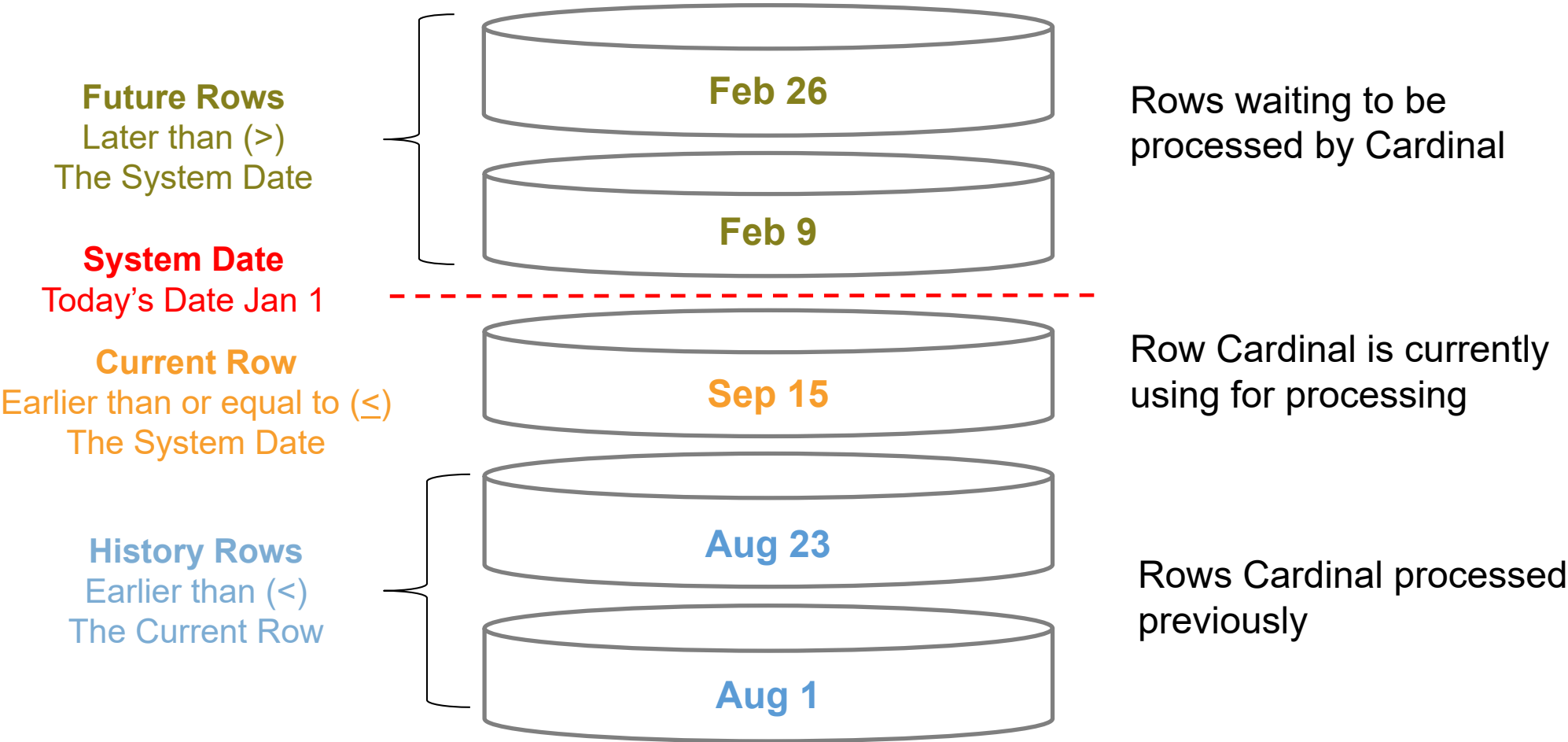
Effective dating provides the ability to keep historical, current, and future-dated information and the ability to update existing information without losing or overwriting the data already in Cardinal.

For further information on effective dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.





Cardinal Effective Dating (continued)





Cardinal Effective Dating (continued)

Group Effective Dating Activity

The employee has transactions in the system for the dates listed in gray below. Review each date and identify if it is a History, Current or Future dated row based on the system date.

System Date: 01/10/2023

03/12/2022

07/02/2022

02/01/2023

02/01/2022

History

Current

Future



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Viewing effective dated rows in job data



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. The effective date does not impact anything in the system.
 - a. True
 - b. False



2. When completing a hire, the Personal Data page must be effective dated:
 - a. Prior to or equal to the effective date of the Job Record
 - b. After the effective date of the Job Record



3. The data entered on the Personal and Job Record will NOT be used in determining benefits.
 - a. True
 - b. False



Lesson Summary

1

Overview of Cardinal HCM

In this lesson, you learned:

- Cardinal HCM system applications
- Cardinal HCM functional areas: Human Resources and Benefits
- The importance of effective dating in Cardinal HR



Lesson

2

HR Key Concepts

This lesson covers the following topics:

- HR Data Relationships: Position Data, Personal Data, Employee Job Record
- Core employee data used for administering Benefits



HR Data Relationships Video



HR Data Relationships

① POSITION DATA*

Pooled Position: XXX10001

Pos Descr: Full Time Kaiser
Business Unit: XXXXX

Pooled Position: XXX10002

Pos Descr: Part Time Kaiser
Business Unit: XXXXX

③ JOB DATA*

Empl ID: 00100123400

Empl Rcd: 0
Position: XXX10001
Business Unit**: XXXXX
Benefit Program: XXX
Full Time/Part Time: Full Time

Empl ID: 00100123600

Empl Rcd: 0 (salary job)
Position: XXX10001
Business Unit**: XXXXX
Benefit Program: XXX
Full Time/Part Time: Full Time

Empl ID: 00100123600

Empl Rcd: 1 (wage job)
Position: XXX10002
Business Unit**: XXXXX
Benefit Program: XXX
Full Time/Part Time: Part Time

② PERSONAL DATA*

Empl ID: 00100123400

Name: Jane Doe
DOB: 5/1/2000
Address: 123 Main Street,
Richmond, VA 23222
SSN: 123-45-6789
Legal Gender: Female

Empl ID: 00100123600

Name: Mark Thomas
DOB: 5/1/2000
Address: 123 Valley Dr,
Richmond VA 23222
SSN: 345-67-8999
Legal Gender: Male

*Fields/data elements listed are only a sample for representative purposes

**Indicates a field on job data that is inherited from position data



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. What three data types can be entered online or interfaced to Cardinal? (Select all that apply)
 - a. Positions
 - b. Personal Data
 - c. Weather Data
 - d. Job Data



2. HBO agencies or Localities have which type of positions?
 - a. Ocean
 - b. Lake
 - c. Stream
 - d. Pooled



3. True or False. All employees for HBO agencies or Localities are placed in either the full time or part time position.



Updates to Personal and Job Data

When making an update to an employee's personal information, a new effective dated row is added to capture the change.

Biographical Details

Contact Information

Regional

VA Person Info

Blue

Person ID

Name

1 of 1

View All

Effective Date

09/23/2022

+

-

Format Type

English

Display Name

Blue

View Name

Updating the employee's name

When updating the employee's job record to process an unpaid leave of absence or a termination, a new effective dated row is added to the employee's job data and not the position.

Updating the employee's job related information

Work Location

Job Information

Payroll

Salary Plan

Compensation

Blue

Empl ID

Employee

Empl Record 0

Work Location Details

1 of 2

*Effective Date

09/24/2022

Go To Row

+

-

Effective Sequence

0

*Action

Data Change

HR Status

Active

Reason

Conversion

Payroll Status

Active

*Job Indicator

Primary Job

Position Number

DLI00316

Current



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. True or False: An employee can have two salaried jobs in Cardinal.



2. What items are needed to complete entry of personal data? (Select all that apply)
 - a. Effective Date
 - b. Name
 - c. Date of Birth
 - d. SSN
 - e. Legal Gender
 - f. Email Address



3. What items are needed to complete entry of job data? (Select all that apply)
 - a. Effective Date
 - b. Position
 - c. Home Address
 - d. Compensation
 - e. Benefits Program



Lesson Summary

2

HR Key Concepts

In this lesson, you learned:

- Health Benefit Only Agencies (HBOs) and Localities will be provided pooled positions
- Employee personal data is required to save the new hire record
- Employee data will be changed on the job record, not on the position
- Core employee data entered on the personal and job data pages is used for administering benefits



Lesson

3

Setup Employee HR Data

This lesson covers the following topics:

- Viewing Position Data
- Hiring an Employee



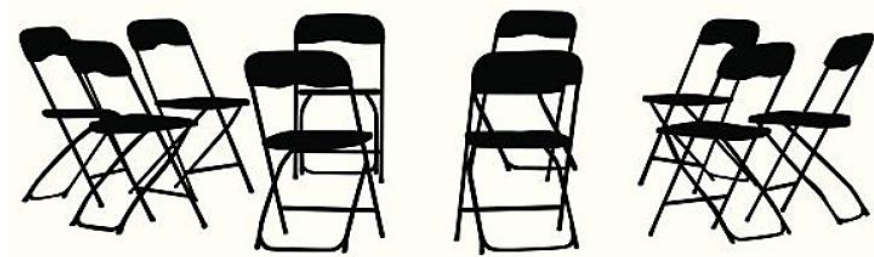
Position Data

Viewing Position Data

- Health Benefit Only Agencies (HBOs) and Localities will be provided pooled positions
- HR Office will have view only access to Position data.
- The HR Office uses a paper form to capture position information changes and routes to DHRM for approval and entry.

Note: Changes to a current position are pushed to all incumbents' job data records.

- DHRM inputs the change(s) in Cardinal after the approval process completes.





Position Data (continued)

Position Number A010000F		
Headcount Status Overallocated		
Current Head Count 59 of 50		
<hr/>		
Effective Date 12/29/2020	Review Date	
Effective Sequence 0	Position Months 12.00	
Reason UPD Position Data Update	Stmt of Economic Interest Req'd No	
Approval Status Approved	VPA Covered No	
<hr/>		
Position Information		
<hr/>		
Position Status Approved	Max Head Count 50	
Status Active	Status Date 01/01/1901	
Action Date 12/29/2020	SOC Code / Extension	
Key Position No	Job Sharing Permitted No	
Budgeted Position Yes	Available for Telework No	
Confidential Position No	EEO-4 Job Category No EEO-4 Reporting	
Alternate Work Schedule No	Workers' Comp Code 8810	
<hr/>		
Job Information		
<hr/>		
Business Unit LOCAL	The Local Choice Participants	Manager Level All Other Positions
Job Code COVA99	COV Default	Full/Part Time Full-Time
Regular/Temporary Regular	Union Code	

Navigation: Navigator > Organizational Development > Position Management > Maintain Position Budgets > Manage Position



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Viewing position data



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. The HR Office will have the ability to:
 - a. Create/Update Position information
 - b. Create/Update Personal and Job Data
 - c. Delete Positions



2. True or False. The Job Record does not require an effective date.



Hiring an Employee

Personal Data Information

If a new hire does not have a SSN, (e.g., Foreign Nationals), the employee must submit an SS-5 Application for a Social Security card to the Social Security Administration. A temporary number can be assigned until the permanent number is received. The “Employee Temporary Number Request” form must be completed and submitted to DHRM. This process is the same as it happens today.

The query RHR187 - Query to Monitor Temporary SSNs monitors temporary SSNs existing in the Cardinal system. For further information on monitoring temporary SSNs, see the Job Aid titled **HR351 Monitoring Temporary SSN**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Prior to completing the new hire, the HR Office conducts an Employee Search Match in Cardinal using the employee’s SSN to identify if the person already exists in the Cardinal system.

- If a match is not found, Cardinal assigns a new employee ID.
- If a match is found (SSN and Name in system must match new entry), the HR Office updates the applicable employee job data record.

For further information on hiring an employee, see the Job Aid titled **HR352 Completing a New Hire**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.





Hiring an Employee (continued)

The Hire process begins with the Employee Search Match to verify whether or not the employee has ever been in Cardinal. The HR Office must have the employee's Social Security Number (National ID) to complete this search. Findings will drive the **Action** and **Reason** fields when completing the hire process (Hire or Rehire).

New Window | Help | Personalize Page

Add a Person

Search Criteria

Search Criteria

Search Results

Person Organizational Summary

Person ID

Employment Instances

ORG Instance 0Last Hire 06/10/2020Termination Date 06/10/2020
HR Status InactivePayroll Status Terminated

Assignments

Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Job Code	Grade	Benefits Status
0	Inactive	Terminated	06/11/2020	71800	06/10/2020	Classified Salary	06/10/2020	91512	6	Active

Return to Search

Notify



Hiring an Employee (continued)

If an existing Employee ID is not found during the Employee Search Match, navigate to the **Add a Person** page. **Person ID** defaults to “NEW.” Leave it as-is and click “**Add Person**.” Cardinal will automatically assign an Empl ID.

The screenshot shows the 'Add a Person' page in the Cardinal system. At the top right, there are links for 'New Window', 'Help', and 'Personalize Page'. The main heading is 'Add a Person'. Below this, there is a 'Person ID' label next to a text input field containing the value 'NEW'. A green button labeled 'Add Person' is highlighted with a red rectangular border. Below the button, there is a blue link that says 'Search for Matching Persons'.



Hiring an Employee (continued)

New Window | Help | Personalize Page

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info

Person ID NEW

Name

1 of 1

View All

*Effective Date

*Format Type

Display Name

English Name Format

Name Prefix

*First Name

Middle Name

*Last Name

Name Suffix

Display Name

Formal Name

Name

OK Cancel Refresh Name

Biographic Information

Date of Birth

Birth Country

Birth State

Birth Location



Hiring an Employee (continued)

[New Window](#) | [Help](#) | [Personalize Page](#)

Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

Person ID NEW

Name Q | ◀ ▶ 1 of 1 ▼ | ▶ | [View All](#)

*Effective Date 01/01/2021 📅 + -

*Format Type English ▼

Display Name ██████████ [Edit Name](#)

Biographic Information

Date of Birth 📅 Years 0 Months 0

Birth Country USA 🔍 United States

Birth State 🔍

Birth Location 🔍

☐ Exclude Contact Information?



Hiring an Employee (continued)

Biographical History

1 of 1

View All

*Effective Date

01/01/2021

+

-

*Gender

Unknown

*Highest Education Level

Not Indicated

*Marital Status

Unknown

As of

Language Code

Alternate ID

☐ Full-Time Student

National ID

1-1 of 1

View All

*Country	*National ID Type	National ID	Primary ID		
USA	Social Security Number		<input checked="" type="checkbox"/>	+	-

Save

Notify

Refresh

Add

Update/Display

Include History

Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)



Hiring an Employee (continued)

New Window | Help | Personalize Page

Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

New Window | Help | Personalize Page

Address History

New Window | Help | Personalize Page

Current Address

Address Type Address

Home 0

Phone Information

*Phone Type

OK

Edit Address

Country United States

Address 1

Address 2

Address 3

City State

Postal

County

OK Cancel

Note: Address 1, City, State, and Postal are required fields. The state selected as part of the address will have a direct impact on benefit options.



Hiring an Employee (continued)

Cardinal HCM leverages the Virginia Information Technologies Agency's (VITA) cloud-based Identify Access Management tool, Okta, to authenticate agency users. This tool requires a valid email address to complete the authentication process. To ensure all employees (active and inactive) can always access Cardinal, Cardinal HCM requires a preferred email address.

The HR Office selects the appropriate **Email Option** radio button.

The HR Office then selects the Email Type (Business or Personal), enters the email address in the **Email Address** field, and selects the **Preferred** checkbox.

The screenshot displays a web form with a torn paper border. The 'Phone Information' section contains a table with columns for Phone Type, Telephone, Extension, and Preferred. The 'Email Option Selection' section features three radio buttons: 'Agency Provided Email' (selected), 'Pending Agency Provided Email', and 'Employee Provided Email'. Below this, the 'Email Addresses' section contains a table with columns for Email Type, Email Address, and Preferred. The 'Email Option Selection' and 'Email Addresses' sections are highlighted with a red border.

*Phone Type	Telephone	Extension	Preferred
Business	555/555-5555		<input type="checkbox"/>

Email Option Selection

☒ Agency Provided Email ☐ Pending Agency Provided Email ☐ Employee Provided Email

*Email Type	*Email Address	Preferred
		<input type="checkbox"/>



Hiring an Employee (continued)

- Select the **Employee** checkbox
- Verify **Hire** auto-populates in the **Select Checklist Code** field
- Click the **Add Relationship** button

[New Window](#) | [Help](#) | [Personalize Page](#)

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | **Organizational Relationships** | [VA Person Info](#)

Person ID NEW

Choose Org Relationship to Add

☐ **Employee**

☐ Contingent Worker

☐ Person of Interest

Select Checklist Code

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

40



Hiring an Employee (continued)

Job Data Information

When entering job details for the new hire or rehire, the effective date represents the hire or rehire date and must be greater than or equal to the effective date of the Personal Data entered

Select the appropriate Action/Action Reason that best describes the hire reason. For further information on valid Action/Action Reason combinations, see the Job Aid titled **HR352 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

The selected **Action/Action Reason** field drives automatic updates to HR, Payroll, and Benefit statuses.

The shared position data automatically populates on the employee's **Job Data** page after the **Position Number** field is entered/selected.

Additional job data information, (e.g., employee class – TLC EE) is entered on the **Job Data** page.

Employees holding multiple concurrent jobs have a single Employee ID, but multiple employee job records.

For further information on hiring an employee, see the Job Aid titled **HR352 Completing a New Hire**. This job aid can be found on the Cardinal website in **Job Aids** under **Learning**.





Hiring an Employee (continued)

Job Data – Work Location

New Window | Help | Personalize Page

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Employee [Redacted] Empl ID [Redacted]
Empl Record 0

Work Location Details ?

*Effective Date 01/25/2021 [Calendar Icon] Effective Sequence 0

HR Status Active
Payroll Status Active

*Action Hire
Reason New Hire
*Job Indicator Primary Job

Go To Row + -

Calculate Status and Dates

Position Number A010000F [Search Icon] TLC 047001000 Full Time Pos
Override Position Data

Position Entry Date 01/25/2021
☐ Position Management Record

Regulatory Region USA
Company A01
Business Unit LOCAL
Department 047001000
Department Entry Date 01/25/2021
Location OHB
Establishment ID LOCAL [Search Icon]

United States
Lee County - DSS
The Local Choice Participants
Lee County - DSS
DHRM Office of Health Benefits
Localities

Date Created 01/29/2021

For further information on Action/Action Reasons, see the Job Aid titled **HR352 Action Reason Codes**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Hiring an Employee (continued)

Job Data – Job Information

[New Window](#) | [Help](#) | [Personalize Page](#)

[Work Location](#) | **[Job Information](#)** | [Job Labor](#) | [Payroll](#) | [Salary Plan](#) | [Compensation](#)

Employee

Empl ID

Empl Record 0

Job Information Details ?

1 of 1

Effective Date01/25/2021

Effective Sequence0

HR StatusActive

Payroll StatusActive

ActionHire

ReasonNew Hire

Job IndicatorPrimary Job

Go To Row

Current

Job CodeCOVA99

Entry Date01/25/2021

Supervisor LevelE

Reports To400HR102

Regular/TemporaryRegular

Empl ClassTLC EE

Regular ShiftNot Applicable

Classified IndClassified

COV Default

EmployeeSecurity Assistant (2)

Full/PartFull-Time

*Officer CodeNone

Shift Rate

Shift Factor

SOC Code

Supervisor Name



Hiring an Employee (continued)

Job Data – Payroll

[New Window](#) | [Help](#) | [Personalize Page](#)

Work Location

Job Information

Job Labor

Payroll

Salary Plan

Compensation

Employee Empl ID Empl Record 0

Payroll Information ?

Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Go To Row

Current

*Payroll System Payroll for North America

Absence System Other

Payroll for North America ?

Pay Group MNP Non-Payroll

Employee Type S Salaried

Tax Location Code 087 Henrico

GL Pay Type

Combination Code

Holiday Schedule NOHOL LOCALITY

FICA Status Exempt

Edit ChartFields



Hiring an Employee (continued)

Job Data – Compensation

Work Location

Job Information

Job Labor

Payroll

Salary Plan

Compensation

Empl ID

Empl Record 0

Compensation Details

Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

Go To Row

Compensation Rate 0.000000

*Frequency A Annual

Current

Comparative Information

Pay Rates

Annual USD Daily USD

Monthly USD Hourly USD

Default Pay Components

Pay Components

Amounts

Controls

Changes

Conversion

*Rate Code

Seq

Comp Rate

Currency

Frequency

Percent

1 NAANL

0

USD

A

+

-

Calculate Compensation

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

OK

Cancel

Apply

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation



Hiring an Employee (continued)

Job Data – Benefits Program Participation

Benefit Program Participation

New Window | Help | Personalize Page

Employee [redacted] Empl ID [redacted]
Empl Record 0

Benefit Status ⓘ

1 of 1

Benefit Record Number 0

Go To Row

Effective Date 01/25/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason New Hire

Job Indicator Primary Job

*Benefits System Benefits Administration

Annual Benefits Base Rate USD

Current ☐

Benefits Employee Status Active

ACA Eligibility Details

Benefits Administration Eligibility ⓘ

BAS Group ID

Elig Fld 1

Elig Fld 2

Elig Fld 3

Elig Fld 4

Elig Fld 5

Elig Fld 6

Elig Fld 7

Elig Fld 8

Elig Fld 9

Benefit Program Participation Details ⓘ

1 of 1

*Effective Date 01/25/2021

*Benefit Program PSX

Currency Code USD

Sys delivered empty Ben Pgm

+ -

Job Data

Employment Data

Earnings Distribution

Benefits Program Participation

Save

Return to Search

Previous in List

Next in List

Notify

Refresh

Update/Display

Include History

For further information on eligibility configuration, see the Job Aid titled **BN361 Overview of the Eligibility Configuration Fields**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Hiring an Employee (continued)

Citizenship/Passport

[New Window](#) | [Help](#) | [Personalize Page](#)

Citizenship/Passport

Person ID [REDACTED]

Citizenship/Passport ⓘ

*Country

USA ⓘ

United States

Citizenship Status

Native ▼

Go To Row

+

-

Passport Information ⓘ

1 of 1 ▼

View All

*Passport Number

+

-

Issue Date

📅

Expiration Date

📅

Country

USA ⓘ

United States

🔍



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Hiring an employee



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. What information must be entered on the Personal Data for the new Employee
 - a. SSN, birth date, name, legal gender, business email address
 - b. Position and Job information
 - c. Compensation



2. What information must be entered on the Job Data for the new Employee
 - a. SSN, birth date, name, legal gender, business address
 - b. Position, Job information, Compensation
 - c. Payroll Paysheet



Lesson Summary

3

Setup Employee HR Data

In this lesson, you learned

- How to view Position Data
- How to hire an Employee



Lesson

4

Benefit Events and Programs

This lesson covers the following topics:

- Key Concepts pertaining to:
 - Benefit Events
 - Lifecycle of a Benefit Event



Benefit Events

Benefit Events evaluate or reevaluate an employee's benefit eligibility and provide the employee with the opportunity to update their enrollment as needed.

All benefit enrollments or changes are made through a Benefit Event. The types of Benefit Events include:

Hire

**Open
Enrollment**

Life Event

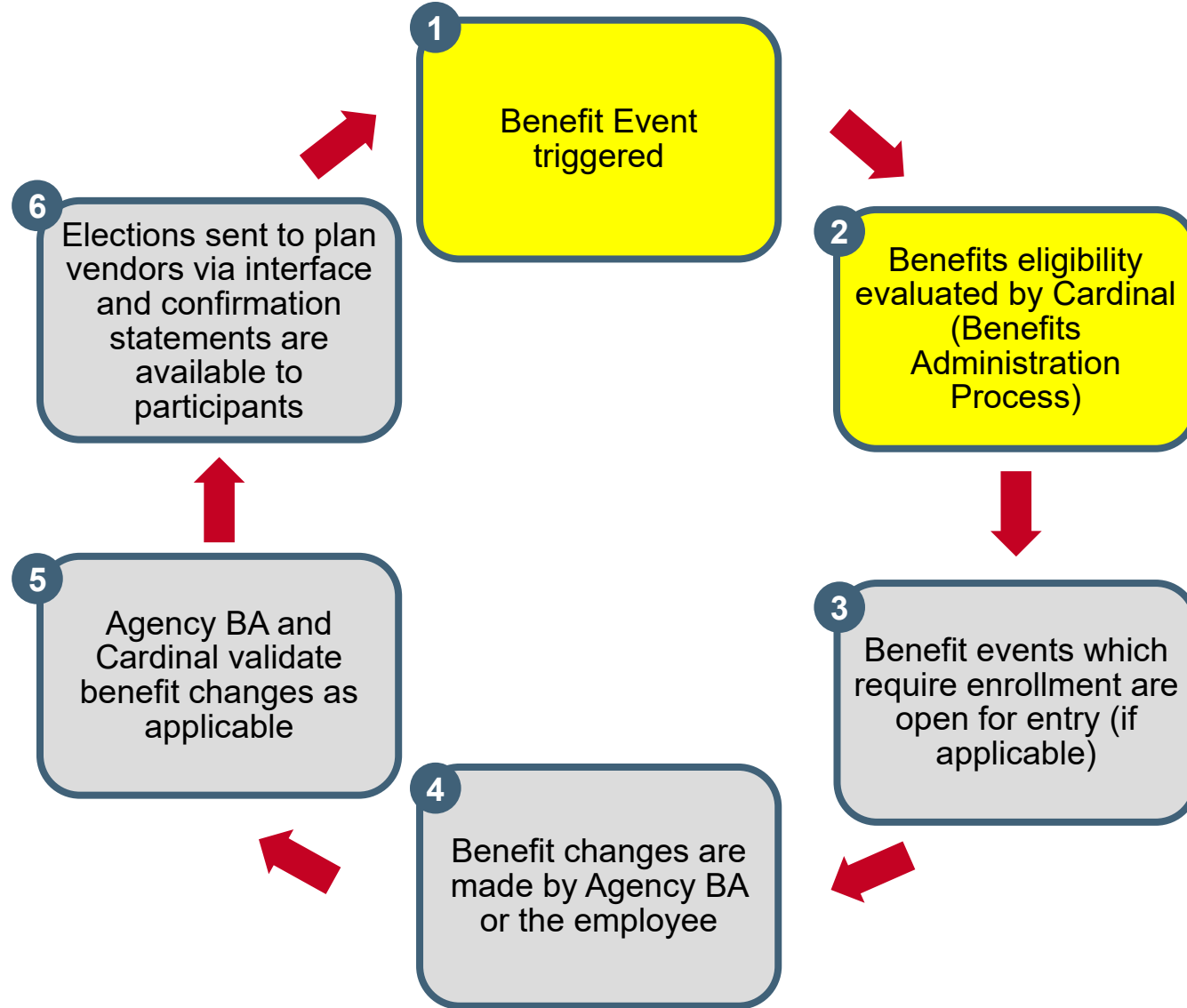
**Address
Change**

**Leave of
Absence**

Only one Benefit Event can be open at any time. It is extremely important that open events are monitored and processed as soon as possible.



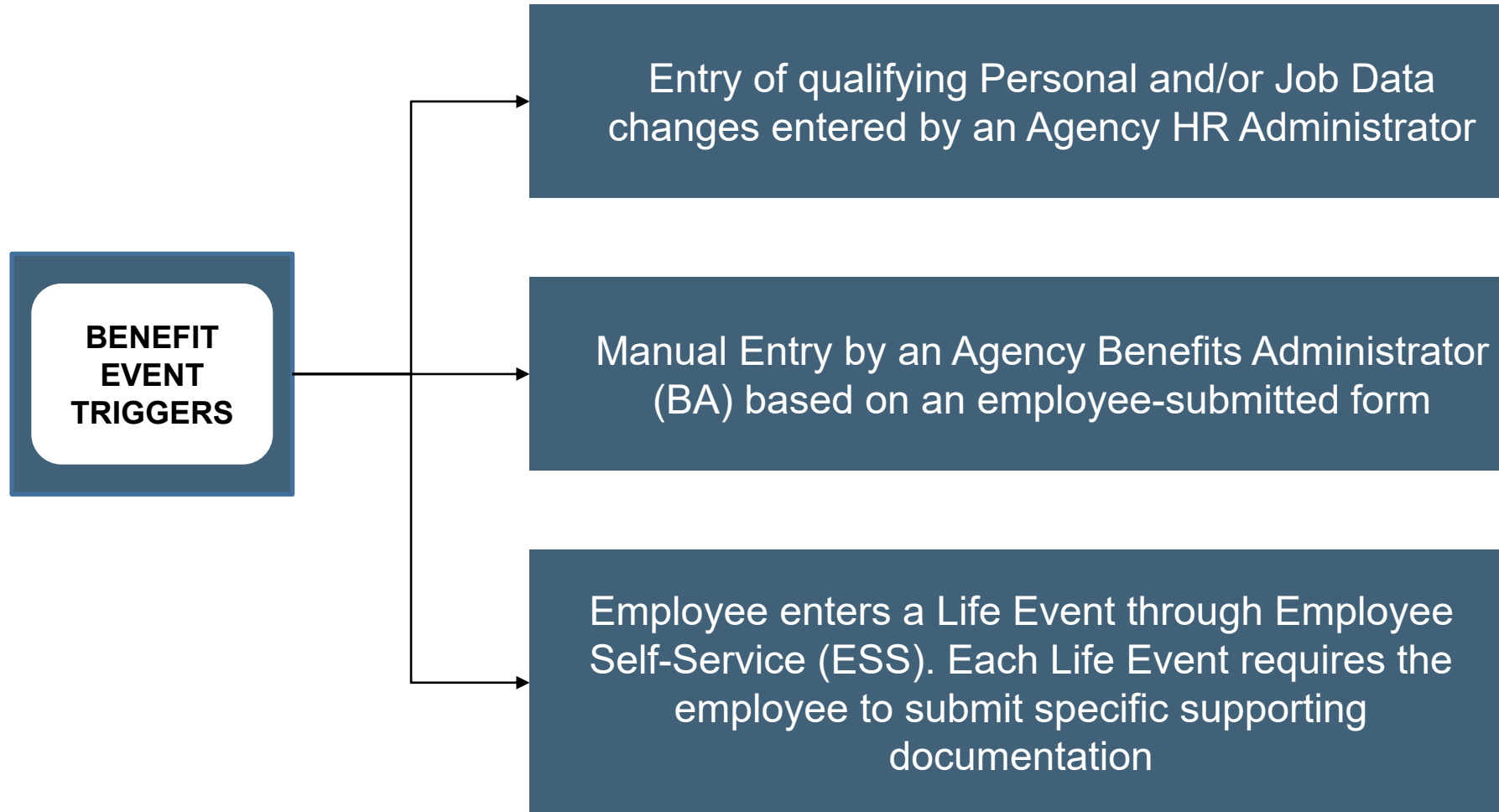
Lifecycle of a Benefit Event





Benefit Events Triggers

Benefit Events can be triggered in three different ways:





Eligibility Determination (Benefits Administration Process)

Most Job Data changes will trigger a Benefit Event. All Benefit Events are evaluated by the Benefit Administration process. However, many are closed because no benefits eligibility change exists (e.g., supervisor change).

Changes that would make the employee eligible to update their benefits include the following:

JOB DATA

- Action / Reason
- Employee Class
- Part / Full / Quasi Status
- Pay Frequency
- Work Location
- Eligibility Configuration Fields

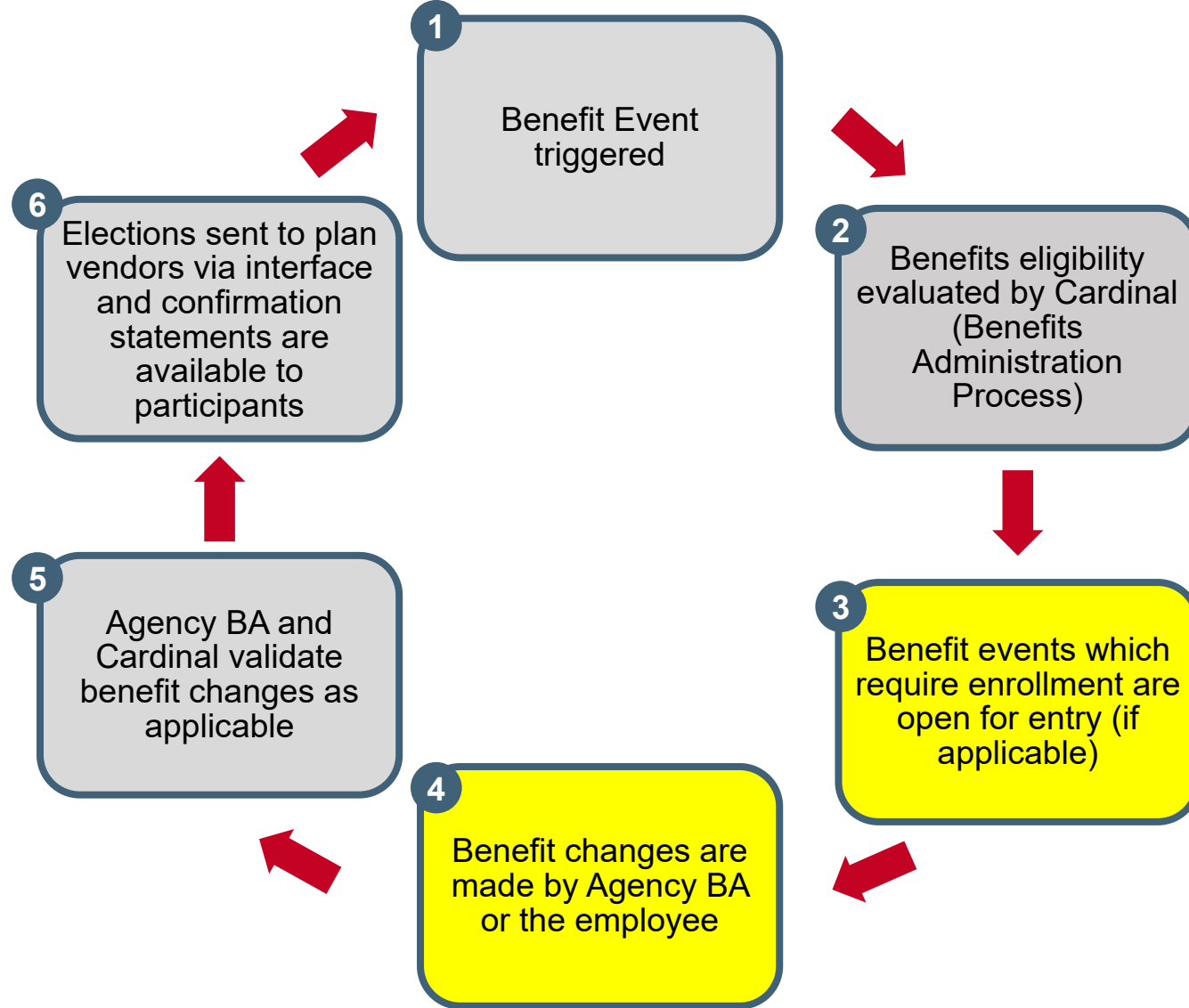
PERSONAL DATA

- Date of Birth
- Gender
- Marital Status
- Address (Zip Code)

Note: The Benefits Administration Process runs every 2 hours.

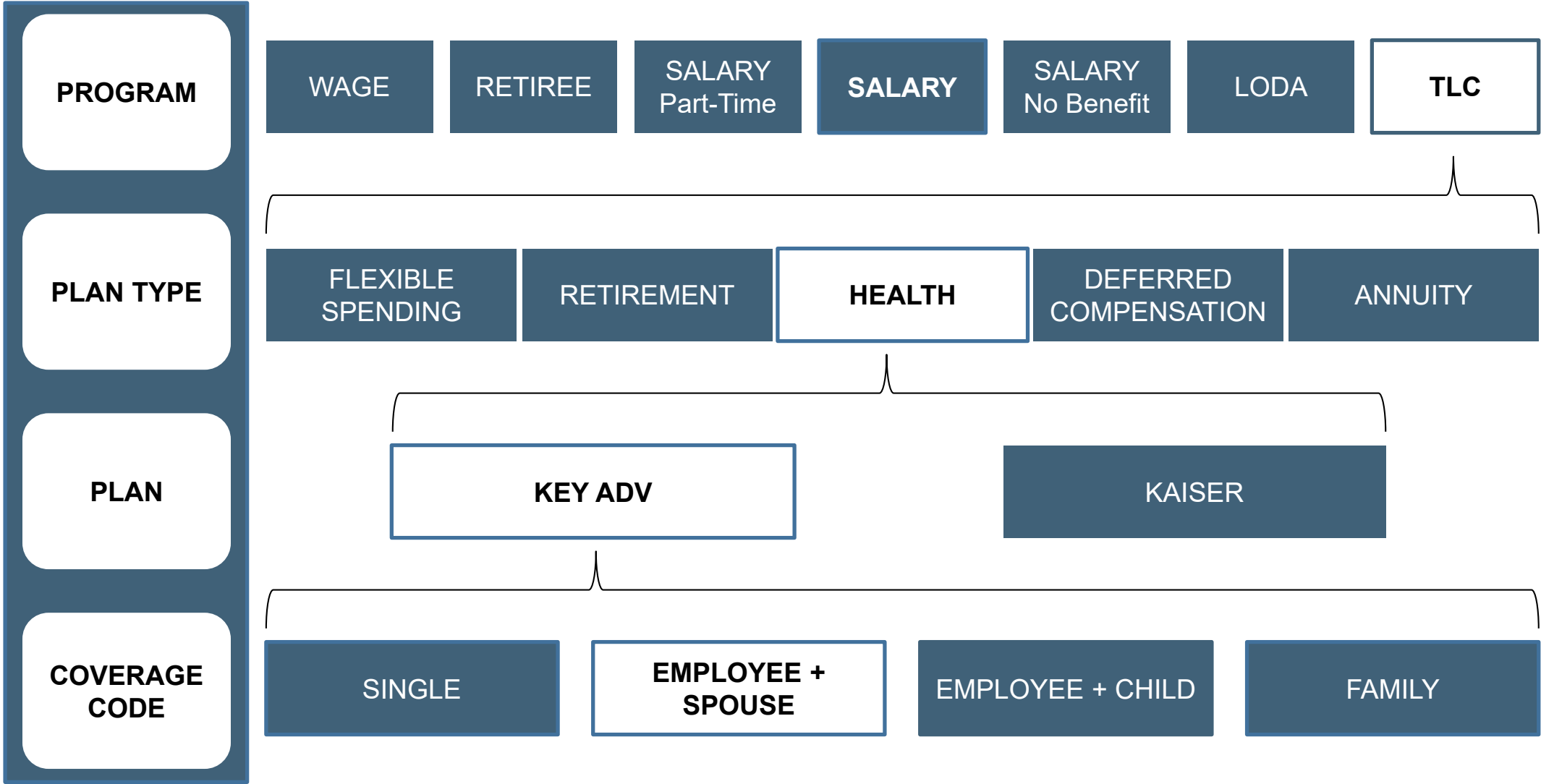


Lifecycle of a Benefit Event (continued.)



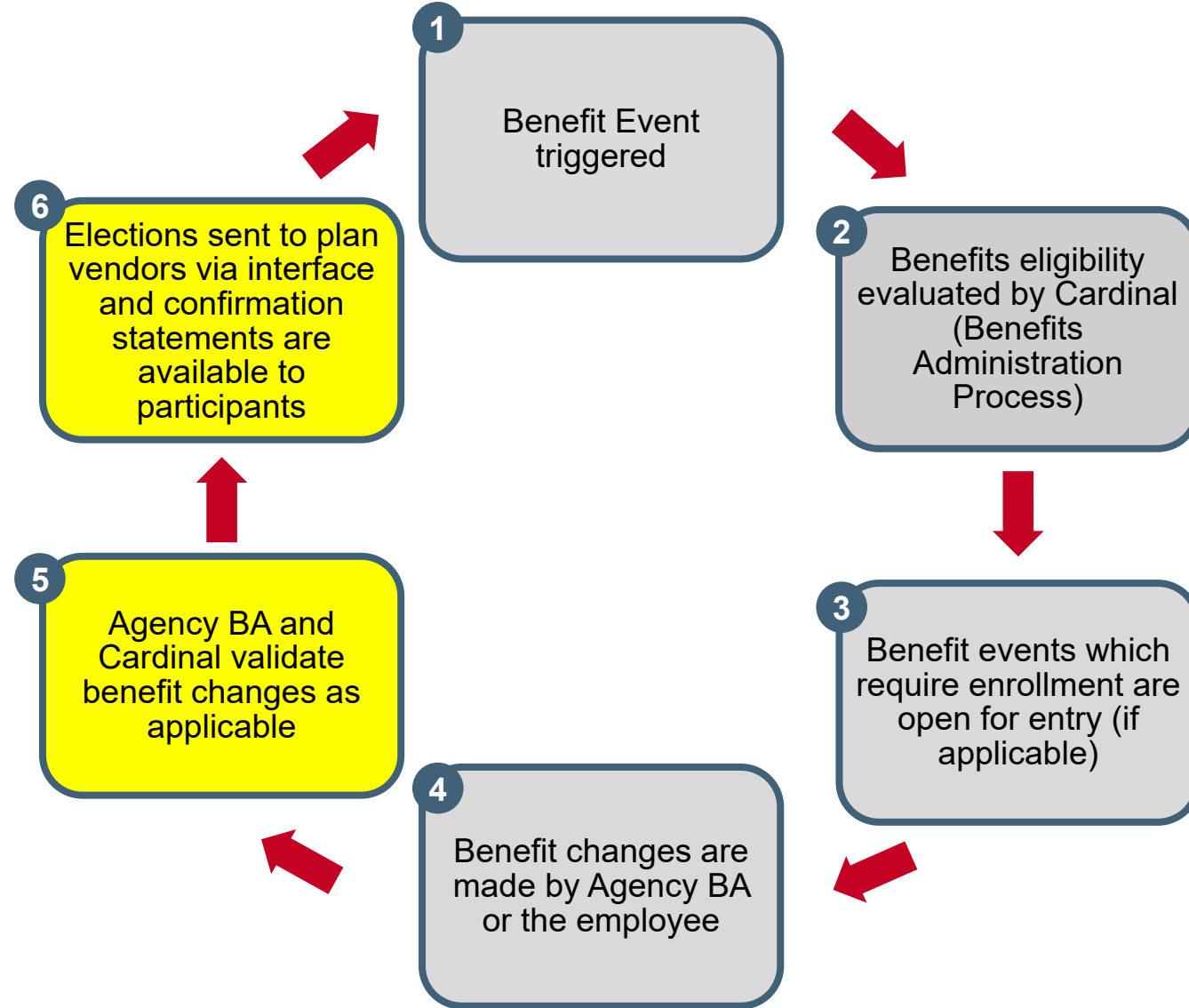


Benefit Program Selection Example



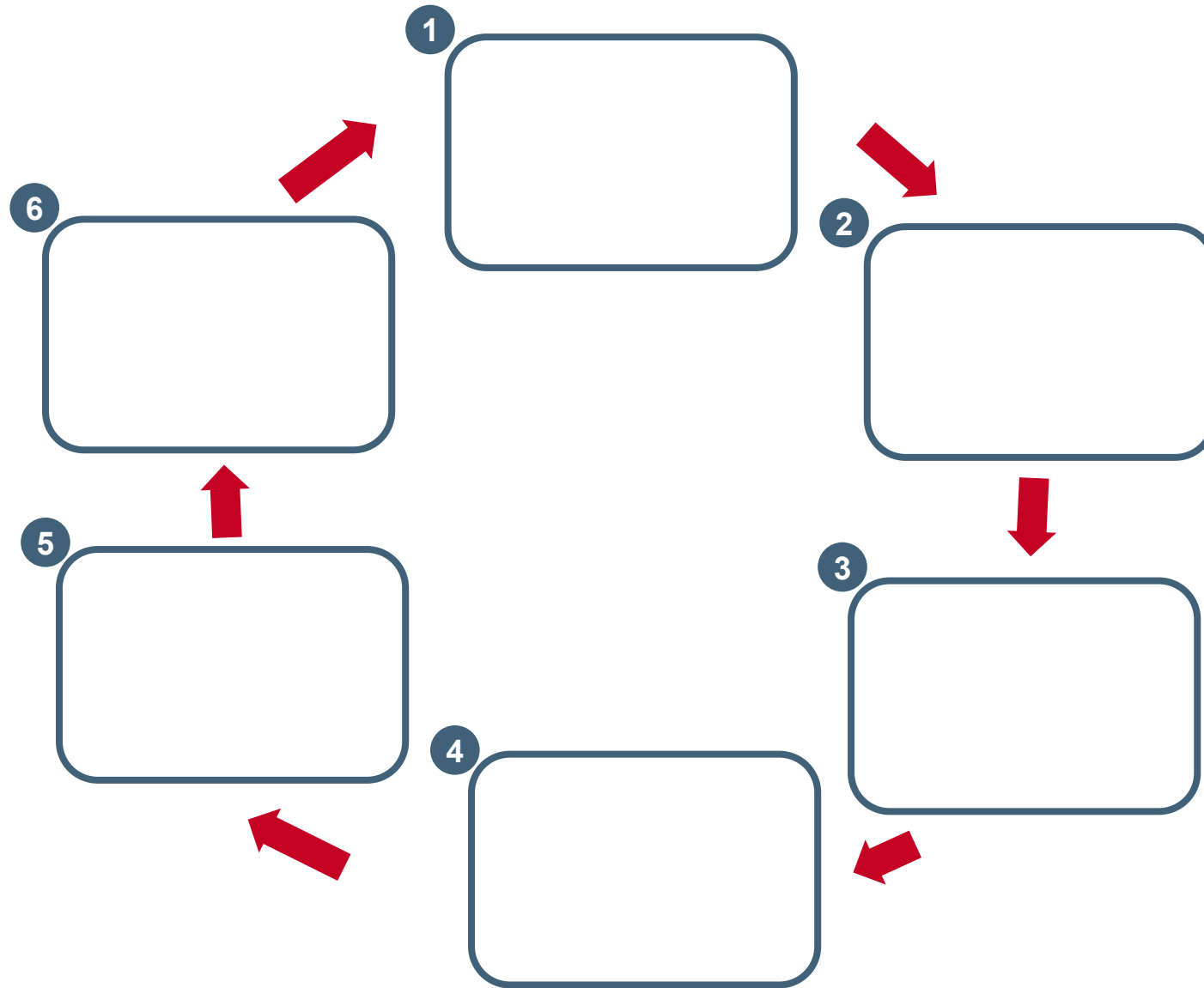


Lifecycle of a Benefit Event (continued..)





Lesson Checkpoint



Benefit events which require enrollment are open for entry (if applicable)

Agency BA and Cardinal validate benefit changes as applicable

Elections sent to plan vendors via interface and confirmation statements are available to participants

Benefit changes are made by Agency BA or the employee

Benefit Event triggered

Benefits eligibility evaluated by Cardinal (Benefits Administration Process)



Lesson Summary

4

Benefit Events and Programs

In this lesson, you learned

- The Key Concepts pertaining to:
 - Benefit Events
 - Benefit Event Triggers
 - Lifecycle of a Benefit Event



Lesson

5

Benefits Navigation Overview

This lesson covers the following topics:

- Benefits Navigation Overview
- Overview of the Benefits Administrator Page Menu
- Accessing the On-Demand Maintenance Page
- Overview of the On-Demand Maintenance Page



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Access the **On-Demand Event Maintenance** page
- Overview of the **On-Demand Event Maintenance** page



Benefits Navigation Overview

Accessing the various Benefits pages, reports, and queries is completed through both:

- **Benefits Administrator** tile
- **Navigator > Benefits**



Benefits Administrator Page Menu Overview

The **Benefits Administrator Page Menu** is used to access most of the Benefits pages that are utilized to:

- Update/View Employee and Dependent information
- Perform Benefit Enrollments
- Review Employee Benefits information
- Process Benefit Events

The screenshot displays the 'Benefits Administrator' interface. On the left is a sidebar menu with a red border around the 'Employee/Dependent Information' section, which includes 'Update Dependent/Beneficiary' (highlighted in green), 'Maintain Certifications', 'Enroll in Benefits', 'Review Employee Benefits', and 'Benefits Management'. The main content area is titled 'Update Dependent/Beneficiary' and includes a search instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. A 'Search Criteria' section contains dropdown menus for 'Empl ID', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown and a text input field. At the bottom, there are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', a text input for 'Limit the number of results to (up to 300):' set to '300', and buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.



On-Demand Event Maintenance Page Overview

The **On-Demand Event Maintenance** page allows the BA to perform maintenance to currently open and closed Benefits Events.

Cardinal Homepage

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Benefits Management

Online Confirmation Statements

Review BAS Activity

On-Demand Event Maintenance

Update Event Status

Benefits Administrator

On-Demand Event Maintenance

Thomas Jones31

Person ID 00858057000 Ben Record 0

Activity Date 10/25/2022 Source Job Data Change Empl Record 0

Schedule/Prepare Activity Pending Activities 1 Show Activities Action HIR

Event ID 0 Event Date Status Class Event Status Update

Prepare Options 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

Note: See the Appendix for a list of Events Statuses, Event Process Statuses, and the Process Indicators.



Lesson Summary

5

Benefits Navigation Overview

In this lesson, you learned

- Benefits Navigation Overview
- Overview of the Benefits Administrator Page Menu
- Accessing the On-Demand Maintenance Page
- Overview of the On-Demand Maintenance Page



Lesson

6

Processing New Hire Enrollments

This lesson covers the following topics:

- General Information about New Hire Enrollments
- Processing a New Hire Enrollment
- Viewing employee Benefits information (current)
- Re-opening and reprocessing Benefit Events
- Viewing employee Confirmation Statements



New Hire Enrollments General Information

Reminder: All benefit enrollments or changes are made through a Benefit Event.

New Hire Benefit Events are triggered when an Agency Human Resources (HR) Administrator processes a “New Hire” action.

The Event Date is driven based on the Effective Date of the “New Hire” action completed by HR.

The Coverage Begin Date for all elected plans will be the first day of the month following employee’s hire date. (ex: employee hired on 10/25/2022, Coverage Begin Date for elected plans will be 11/1/2022)

The Deduction Begin Date for all elected plans will be the same as the coverage begin date for New Hire Benefit Events.

Plan elections are transmitted to the Vendor nightly (Monday – Friday excluding holidays).

Confirmation Statements will be available after the Benefits Administration process runs.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Processing a New Hire Enrollment



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Finalizing Benefit Events Errors

The system performs validations when the **Validate/Finalize** button is clicked. These validations include:

- Validating eligibility
- COVA systematic rules pertaining to valid elections/transactions

If any errors are identified, they will display as a numeric value (1, 2, 3, etc.) in the **Errors** field to the right of the **Validate/Finalize** button. The corrective action will vary based on the actual error received.



Viewing an Employee's Current Benefits Information

The current Benefits information for an employee can be viewed on the **Current Benefits Summary** page at any time. This page does not include any historical benefit elections data for the employee. This is recommended after any Benefit Event is processed to ensure accuracy (New Hire, Life Event, etc.). Navigate to the **Current Benefits Summary** page using the following path:

Benefits Administrator tile > Review Employee Benefits > Current Benefits Summary



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Viewing an employee's current Benefits information to ensure accuracy



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Re-Opening a Benefit Event

If any updates/corrections need to be made after processing a Benefit Event, the Benefit Event can be re-opened for edits and then reprocessed.

Benefit Events are re-opened on the **BenAdmin Event Status Update** page. Navigate to this page using the following path:

Benefits Administrator tile > Benefits Management > On-Demand Event Maintenance > Events Status Update button

BenAdmin Event Status Update

Help

Update Event Status

Empl ID 00858056800 Thomas Jones30 Ben Record 0

Event Status Update ?

Schedule ID EM00
Event Date 10/25/2022
Event ID 1
Event Class HIR Initial Enrollment
Event Priority 100
Benefit Program SAL
Process Status Finalized - Enrolled
Action Source Job Data Change

☐ Event Disconnected

☐ Address Eligibility Changed
☐ MultiJob Indicator Changed
☐ Job Eligibility Changed
☐ Event Out of Sequence
☐ Finalize/Apply Defaults

Print Option Print Both Forms

*Process Re-Enter

*Event Status Open for Processing

OK

Cancel

Apply

Refresh



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Re-opening and reprocessing a Benefit Event (New Hire) to make a plan election correction



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Confirmation Statements General Information

The Agency BA can view and print Confirmation Statements. Each Benefit Event creates a new Confirmation Statement. When an employee performs Benefit Enrollments and/or submits a Life Event, the Agency BA can review the employee's Confirmation Statements.

- Confirmation Statements are created and run as batch jobs once per week
- The Agency BA has access to view/print their employees' Confirmation Statements
- The Benefit Confirmation Statements list the participants' recent benefit elections and the per-pay-period costs
- The participant submits a marked-up Confirmation Statement to the Agency BA for review if any changes are required
The Agency BA would update the enrollment to have a new statement generated
- Federally mandated health benefit notice language is included in the printed Confirmation Statements
- The Confirmation Statements reflect the monthly cost and does not include cost per pay period.

Confirmation Statements are viewed/printed from the **Review Employee Statements** page. Navigate to this page using the following path:

Benefits Administrator tile > Review Employee Benefits > Review Employee Statements



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Viewing an employee's Confirmation Statement



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint



1. New Hire Benefit Events are triggered by:
 - a. Employee initiated through Employee Self-Service
 - b. New Hire action completed by an Agency HR Administrator
 - c. Employee submitted Benefits form



2. The employee's new hire date is 1/15/2023. The New Hire Benefit Event was processed on 1/17/2023. The Coverage Begin Date for the elected plans will be:
 - a. 1/17/2023
 - b. 1/15/2023
 - c. 2/1/2023



3. True or False. Benefit Events can be re-opened and reprocessed in order to make updates or corrections.



Lesson Summary

6

Processing New Hire Enrollments

In this lesson, you learned

- General Information about New Hire Enrollments
- How to process a New Hire Enrollment
- How to view employee benefits information (current and historical)
- How to re-open and reprocess Benefit Events
- How to view an employee's Confirmation Statement



Lesson

7

Processing Rehires and Leaves of Absence

This lesson covers the following topics:

- Rehiring an employee
- Placing an employee on leave and returning an employee from leave



Rehire - Add Employment Instance

After completing the Search and determining that the employee exists in Cardinal, review the information (Business Unit, Employee Classification, etc.). Make note of the employee ID number and navigate to the **New Employment Instance** page using the following path:

Navigator > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance

Add Employment Instance

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Search by:

Empl ID ▼

 begins with

Limit the number of results to (up to 300):

Search

[Advanced Search](#)

Enter the employee ID in the **Empl ID** field and click **Search**.



Rehire - Add Employment Instance

The following message displays.

A screenshot of a web-based confirmation dialog box. The text inside reads: "Do you wish to open the Job Data associated to this emplid: [text box] Employee Record: 0 (25101,91)". Below the text are two buttons: "Yes" and "No". The "Yes" button is highlighted with a dashed border.

Do you wish to open the Job Data associated to this emplid: [text box] Employee Record: 0 (25101,91)

Yes No

Below is guidance as to when you select **Yes** or **No**.

Select **Yes** when

- Rehiring for the Same Agency
- Rehiring for same type (e.g., Salary to Salary, Wage to Wage)

This opens the current Job Data Employee Record so you can add a new Effective Dated row and make any required updates.

The Employee Record # remains the same (e.g., 0)

Select **No** when

- Rehiring but to a different agency
- Rehiring for different type (e.g., Wage to Salary, Salary to Wage)

This opens a new Job Data Employee Record since it is not the same agency or type. Unless the employee worked at your agency, you will not have access to the previous employee record

The Employee Record incremented by one (e.g., 1) to denote it is a different record for an employee that works or worked for the Commonwealth.

For further information on hiring an employee, see the Job Aid titled **HR352 Completing a Rehire**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Rehiring an employee



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. True or False. When rehiring a former wage employee into a salaried position/job for the same agency, the same employee record is used for the rehire.



2. True or False. When rehiring a former salaried employee into a salaried position/job in a different agency, the same employee record is used for the rehire.



Maintain Leave Status (Unpaid)

The Enter and Maintain Leave Status business process is used to place employees in a paid or unpaid leave status.

Outside the Cardinal system, the HR Office examines the change in leave status and works with the employee to complete the appropriate documentation.

The HR Office completes the following in Cardinal to document a Leave of Absence (Unpaid):

- Insert a row on Job Data to change the employee's status in the Cardinal system to Leave of Absence (Unpaid)
- Enter the Expected Return Date on the Work Location tab
- If Full Time Employee change the Elig Field 9 on the Benefits Program Participation page to TP-GB (employee will pay)

The HR Office completes the following in Cardinal to document a Return from Leave of Absence (Unpaid):

- Insert a row on Job Data to change the employee's status in the Cardinal system to Return from Leave
- If Full Time Employee change the Elig Field 9 on the Benefits Program Participation page to TF-GB (employee will pay)



Maintain Leave Status (continued)

Leave of Absence (Unpaid)

[New Window](#) | [Help](#) | [Personalize Page](#)

Work Location | Job Information | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Work Location Details ? 1 of 3

*Effective Date: 01/27/2021

Effective Sequence: 0

HR Status: Active

Payroll Status: Leave of Absence

*Job Indicator: Primary Job

Position Number: A010000P TLC 047001000 Part Time Pos

Position Entry Date: 01/26/2021

Action: Leave of Absence - Unpaid
Reason: Non-FMLA Parental Leave

Go To Row + -

Current

[Override Position Data](#)

Return from Leave

[New Window](#) | [Help](#) | [Personalize Page](#)

Work Location | Job Information | Payroll | Salary Plan | Compensation

Employee: [Redacted] Empl ID: [Redacted]
Empl Record: 0

Work Location Details ? 1 of 4

*Effective Date: 01/28/2021

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

*Job Indicator: Primary Job

Position Number: A010000P TLC 047001000 Part Time Pos

Action: Return from Leave
Reason: Return From Leave

Go To Row + -

Current

[Override Position Data](#)



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Place an employee on unpaid leave of absence
- Return an employee from leave of absence



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. True or False. The Local HR Office is required to insert a row on the Job record to place an employee on a Leave of Absence (Unpaid).



2. True or False. The Local HR Office is required to insert a row on the Job record to return an employee from a Leave of Absence (Unpaid).



Lesson Summary

7

Processing a Rehires and Leave of Absence

In this lesson, you learned:

- How to rehire an employee
- How to maintain employee leave status



Lesson

8

Processing Manual Benefit Events

This lesson covers the following topics:

- Manual Benefit Events Overview
- Life Events Overview
- Overview of the BN361_Life Event Tool
- Processing Life Events
- QMCSO Overview
- Processing QMCSO Benefit Events



Manual Benefit Events General Information

Reminder: All benefit enrollments or changes are made through a Benefit Event.

Manual Benefit Events are triggered when any of the following occur:

- A Personal and or Job Data change is entered by an Agency HR Administrator (some of these triggered Benefit Events will automatically close if the Personal or Job Data change does not make the employee eligible to update their Benefit enrollments)
- Employee submits a Benefit enrollment form
- Employee enters a Life Event or Open Enrollment through Employee Self-Service (ESS)
- A QMCSO Order is received



Manual Benefit Events General Information (continued)

The date of the Benefits enrollment is driven based on the Event Date (Life Event, QMSCO Order received).

The Event Date (BAS Activity Event Date) is calculated based on the date of the Life Event or date the QMSCO Order was received. Use the BN361_Life Event Tool Job Aid to determine the appropriate BAS Activity Event Date to utilize when processing the manual Benefit Event. This Job Aid is located on the Cardinal Website in **Job Aids** under [Learning](#).

For Life Events, employees have 60 days* to either:

- Submit a Benefits form with the applicable supporting documentation
- or
- Initiate the Life Event through ESS and then submit the applicable supporting documentation

* **Note:** Enrollment can still be processed after 60 Days, however, OHB approval will be required in these cases.



Manual Benefit Events General Information (continued.)

The coverage begin and deduction begin dates will vary based on the specific type of Life Event. Coverage begin dates can also be identified using the BN361_Life Event Tool Job Aid. Some examples include:

Life Event	Coverage Begin and Deduction Begin Date
Marriage	1 st Day of the Month after the marriage date
Birth	Immediately on date of birth
Divorce	1 st Day of the Month after the divorce date

Plan elections are transmitted to the Vendor nightly (Monday – Friday excluding holidays).

Confirmation Statements will be available after the Benefits Administration process runs and will be available weekly.

Note: See the Appendix for a list of the Manual Benefit Events.



Life Events



Life Events General Information

Life Events are a type of Benefit Event and are also referred to as Qualifying Mid-Year Events.

There are various types of Life Events to include:

**MARRIAGE
EVENT**

**BIRTH
EVENT**

**ADOPTION
EVENT**

**DIVORCE
EVENT**

Reminder: Employees have 60 Days to initiate a Life Event after the event date. Enrollment can still be processed after 60 Days, however, OHB approval will be required in these cases.



Key Benefit Dates Related to Life Events

Benefit Enrollment Field	Definition
ELECTION DATE	The date the employee elects their benefits. This is typically the date the coverage changes are entered into the system.
BAS ACTIVITY EVENT DATE	The date used for entry when performing manual Benefit Events. This is based on the date the Life Event occurred.
COVERAGE BEGIN DATE	The date the coverage starts.
DEDUCTION BEGIN DATE	The date the deduction begins for the employee. This will be the Pay Period start date for the Pay Period that the coverage begin date falls in.



Life Event Example: Marriage

Scenario: An employee got married on 12/15. This is a Qualifying Mid-Year Event which allows the employee to update their Benefit enrollments. On 12/17, the spouse was added as a dependent with an effective date of 12/15. The employee elected to change their benefit plan from “SINGLE” to “EMPLOYEE + SPOUSE” and the enrollment was completed on 1/17. In this scenario, the following dates apply:

- **ELECTION DATE** = 12/17
- **BAS ACTIVITY EVENT DATE** = ____ ?
- **COVERAGE BEGIN DATE** = ____ ?

Note for Localities: Deduction begin dates are not applicable.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Navigating to and opening the BN361_Life Event Tool Job Aid
- Using the BN361_Life Event Tool to identify a scenario-specific BAS Activity Event Date and coverage begin date.



Life Event Example: Marriage (continued)

Scenario: An employee got married on 12/15. This is a Qualifying Mid-Year Event which allows the employee to update their Benefit enrollments. On 12/17, the spouse was added as a dependent with an effective date of 12/15. The employee elected to change their benefit plan from “SINGLE” to “EMPLOYEE + SPOUSE” and the enrollment was completed on 1/17. In this scenario, the following dates apply:

- **ELECTION DATE** = 12/17/2022
- **BAS ACTIVITY EVENT DATE** = 12/17/2022
- **COVERAGE BEGIN DATE** = 1/1/2023

Note for Localities: Deduction begin dates are not applicable.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Processing a Manual Benefit Event (Birth Event)



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Reviewing an employee's historical Benefits information



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





QMCSO



Qualified Medical Court Support Order (QMCSO) General Information

Reminder: All benefit enrollments or changes are made through a Benefit Event.

A Qualified Medical Court Support Order (QMCSO) requires the employer group health plan to extend health coverage to a child of an eligible participant. A QMCSO can be in the form of either a Medical Child Support Order or a National Medical Support Notice (NMSN). In Cardinal, the term QMCSO is used to represent both of these types.

The QMCSO Participants Query (V_BN_PARTIC_QMCSO) can be used to view all employees and their dependent(s) that are currently associated with a QMCSO. For more information and instructions on how to run this query, refer to the HCM Reports Catalogs. The HCM Reports Catalogs are located on the Cardinal Website in **Reports Catalogs** under [Resources](#).

* Enrollment can still be processed after 60 Days, however, OHB approval will be required in these cases.



QMCSO General Information

When a QMCSO is received, the following actions need to be taken by the Agency BA outside of Cardinal before processing a QMCSO Benefit Event:

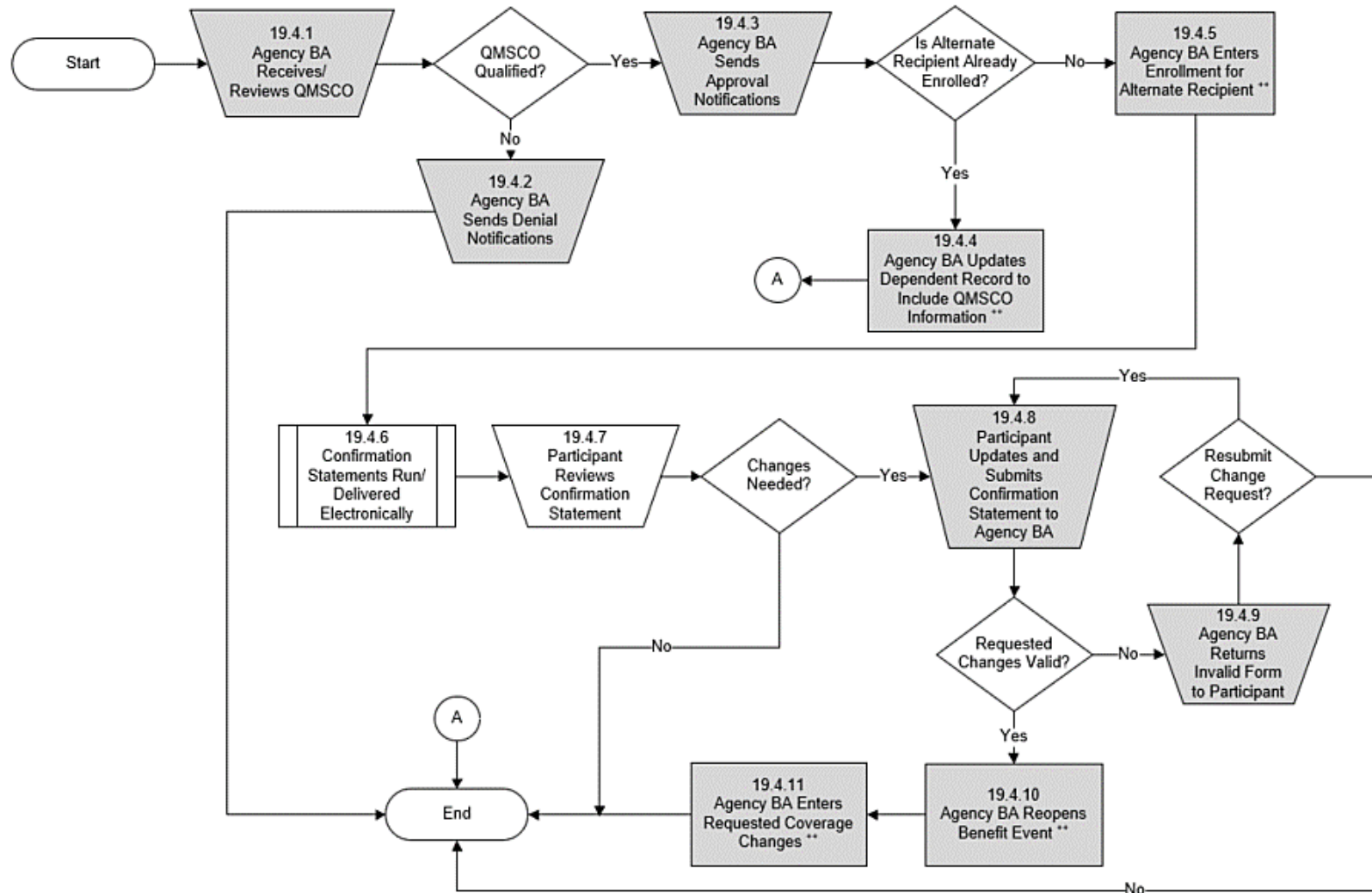
Review the QMCSO and determine:

- Confirm that the employee (participant) is employed within the Agency
- Verify with Agency payroll that the required employee contribution to extend health coverage to the child can be withheld without violating applicable Federal and State withholding limitations or withholding prioritization laws
 - If approved, send notification to the Court or Issuing Agency and the employee (participant)
 - If denied, send notification to the Court or Issuing Agency and the employee (participant) that the QMCSO is not qualified and provide an explanation for denial (ex; employee terminated, defective or missing information, violates withholding limitations or withholding prioritization laws)*

* Court or Issuing Agency may submit a new or revised QMCSO



QMCSO Process Flow





Key Benefit Dates Related to QMCSO Benefit Events

Benefit Enrollment Field	Definition
ELECTION DATE	The date the QMCSO Order is added and the enrollments completed by the BN Administrator.
BAS ACTIVITY EVENT DATE	The date used for entry when performing manual Benefit Events. This is the date the QMCSO Order was received.
COVERAGE BEGIN DATE	The date the coverage starts.
DEDUCTION BEGIN DATE	The date the deduction begins for the employee. This will be the Pay Period start date for the Pay Period that the coverage begin date falls in.

For QMCSO Benefit Events, use the BN361_Life Event Tool to determine the BAS Activity Event Date.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Processing an approved QMCSO Order Benefit Event when the dependent child is already covered under the employee's health plan
- Processing an approved QMCSO Order Benefit Event when the dependent child is not already covered under the employee's health plan



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint



1. The following Job Aid should be used to identify the BAS Activity Event Date:
 - a. BN361_Completing a New Hire
 - b. BN361_BAS Activity Table Overview
 - c. BN361_Life Event Tool



2. An employee got married on 1/12/2023 and this Life Event was processed. The Coverage Begin Date for the spouse on the elected plans will be:
 - a. 1/12/2023
 - b. 2/1/2023
 - c. 1/1/2023



3. True or False. Manual Benefit Events processed after 60 Days will require additional OHB approval.



Lesson Summary

8

Processing Manual Benefit Events

In this lesson, you learned:

- An Overview of Manual Benefit Events
- An Overview of Life Events
- An Overview of the BN361_Life Event Tool
- How to process Life Events
- A QMCSO Overview
- How to process QMCSO Benefit Events



Lesson

9

Viewing Other Employee and Dependent Benefits Information

This lesson covers the following topics:

- Viewing Dependent Information
- Viewing and Creating Disability Certifications
- Monitoring Employee/Dependent Eligibility Information



Viewing Dependent Information

Benefits Administrators have the ability to view and or update dependent information on the **Update Dependent/Beneficiary** page. This page is accessed using the following navigation path:

Benefits Administrator tile > Employee/Dependent Information > Update Dependent/Beneficiary

The key information available to review/update on this page for each dependent includes:

- Name, Address, Contact Information (Phone and Email), Date of Birth, Dependent Beneficiary Type (Approved or Unapproved Dependent), Gender, Marital Status, Disability Status, Student Status, and QMCSO Rider/Order Status

Note: All dependents, regardless of whether they are currently enrolled in a Benefits Plan, will display and be available to view on this page. This data is maintained within Cardinal for cases where the dependent may need to be re-enrolled in a Benefits Plan in the future.



Viewing and Creating Disability Certifications

The ability for employee's to continue coverage for child dependents up to the age of 26 is based on their student status.

Employees can only continue coverage for child dependents after the age of 26 when the dependent has a documented disability. In this case, a Benefits Administrator must create a Disability Certification for the employee and associate it with the corresponding dependent.

Reviewing existing Disability Certifications and creating new Disability Certifications is completed on the **Maintain Certifications** page. This page is accessed using the following navigation path:

Benefits Administrator tile > Employee/Dependent Information > Maintain Certifications

Note: Disability Certifications must be re-certified every 2 years.



Monitoring Employee/Dependent Eligibility Information

The Benefit Eligibility Audit reports are used to monitor and identify employees or dependents meeting specific criteria which may require the Benefits Administrator to take action. The Benefits Eligibility Audit reports are generated using the following navigation path:

Navigator > Benefits > Reports > Audits > Benefit Eligibility Audits

The user will then have the option to generate one or more of the following Reports:

- Dependent Waiting Approval Report
- Retired, Tricare and TLC Employees Approaching 65 Report
- Dependent of Retirees/Tricare/TLC employees Approaching 65
- Dependent Child Approaching 26
- Disabled Over-Age Dependent Child

For more information and instructions on how to run these Reports, refer to the HCM Reports Catalogs. The HCM Reports Catalogs are located on the Cardinal Website in **Reports Catalogs** under [Resources](#).



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Viewing Dependent information on the **Update Dependent/Beneficiary** page
- Creating a Disability Certification on the **Maintain Certifications** page
- Running the Benefit Eligibility Audit Reports



Lesson Summary

9

Viewing Other Employee and Dependent Benefits Information

In this lesson, you learned:

- How to View Dependent Information
- How to View and Create Disability Certifications
- How to Monitor Employee/Dependent Eligibility Information



Lesson

10

Processing Separations

This lesson covers the following topics:

- Separating employees



Separate Employee

Types of Separations covered in this section of the course:

Involuntary Termination

- Layoff
- Standards of Conduct
- Unsatisfactory Performance during Probationary Period
- Inability to Perform Duties

Voluntary Termination

- Resignation
- Retirement: Service Retirement, Retirement In Lieu of Layoff, or Enhanced Retirement
- Separation: Completion of Limited Appointment or Contract
- Death of Employee

Voluntary and Involuntary separations are keyed to inactivate the employee record. Action/Action Reasons are used to reflect the type of separation.

After the Termination transaction is saved, the Benefits status is updated appropriately, and COBRA eligibility is triggered if applicable.

Generally a TLC would just use resignation or retirement as the personnel actions/records would be maintained in the HR system of record.



Separate Employee

The Effective date of all termination transactions in Cardinal must be the date after the last day worked.

Example: If the employee last worked on a Friday, the termination effective date is Saturday, as it is the date immediately following the last day worked.

For further information on Separating Employees, refer to the Job Aid titled **HR351 Separation Statues**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

For further information on the Layoff Process, refer to the Job Aid titled **HR351 Managing the Layoff Process**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Navigation: **Navigator > Workforce Administration > Job Information**



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Separating an employee



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. True or False. Examples of Involuntary Termination include Standards of Conduct, Unsatisfactory Performance during Probationary Period, and Inability to Perform Duties.



2. True or False. Examples of Voluntary Termination include Resignation, Retirement, and Death.



3. True or False. The effective date of a termination is the day after the last day worked.



Lesson Summary

10

Processing Separations

In this lesson, you learned:

- How to process a separation/termination for an employee



Lesson

11

COBRA Administration

This lesson covers the following topics:

- Overview of COBRA
- Monitoring COBRA Eligibility and Status



COBRA Overview

COBRA is an extension of the current group health insurance plan offered to employees after they have left the Organization. This coverage can be kept for up to 18 months and is only available to individuals and families covered under a plan with more than 20 employees enrolled.

Upon onboarding with the Agency, a General Letter must be distributed to every employee and spouse regarding COBRA. This General Letter is not systematically generated by Cardinal and is created and distributed by the Agency.



COBRA Overview (continued)

After onboarding with the Agency, there are various reasons that an employee, spouse, or child dependent may become eligible (COBRA qualifying events) to enroll in COBRA.

Employee	Spouse	Child Dependent
Job Transaction: Termination	Marital Status Change for the Employee to “Divorced”	Removal of child dependent by the employee
Job Transaction: Reduction in Hours	Death of the employee	Child dependent going over the age of 26 (no disability status)
Waiving Coverage		
Retirement		



COBRA Overview (continued.)

COBRA processing is centralized at the Office of Health Benefits (OHB). When an employee, spouse, or child dependent(s) becomes eligible for COBRA, no processing action is required by the Agency Benefits Administrator. OHB will send the COBRA Notification Letter(s).

If the employee, spouse, and child dependent(s) elects to enroll in COBRA, OHB will process and manage the enrollment.



Monitoring COBRA Eligibility and Status

Although OHB performs all actions related to COBRA, other than the initial distribution of the General Letter(s) upon onboarding, the Agency Benefits Administrators have the ability to monitor COBRA eligibility and the current status.

The Agency BA can monitor an employee and dependent COBRA eligibility and status in the following ways:

- The Review Event Summary Page
- Event Summary Report
- COBRA Enrollment Report



Monitoring COBRA Eligibility and Status (continued)

Review Event Summary page can be viewed to review information to include the Event Class (reason for COBRA eligibility), Qualification Status, Process Status, and health coverage information (coverage begin and end date). Navigate to this page using the following path:

Navigator > Benefits > Administer COBRA Benefits > Review Processing Results > Review Event Summary



Monitoring COBRA Eligibility and Status (continued).

There are several reports that the BA can generate to monitor COBRA eligibility and status:

Event Summary Report: Provides a list of all COBRA eligible individuals with event and enrollment status. Generate this report using the following navigation path:

Navigator > Benefits > Administer COBRA Benefits > Review Processing Results > Event Summary Report

COBRA Enrollment Report: Displays all individuals enrolled in COBRA along with their health coverage information (coverage begin and end date) and dependent information. Generate this report using the following navigation path:

Navigator > Benefits > Administer COBRA Benefits > Review Processing Results > Enrollment Report

For more information and instructions on how to run the Event Summary Report or COBRA Enrollment Report, refer to the HCM Reports Catalogs. The HCM Reports Catalogs are located on the Cardinal Website in **Reports Catalogs** under [Resources](#).



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Viewing the Review Event Summary Page
- Running the Event Summary Report
- Running the COBRA Enrollment Report



Hands-On Exercise

Now you have an opportunity to practice the lessons learned today in a training environment.

Your instructor will provide direction on how to log in and complete the exercise.

If you have any questions, please ask your instructor.





Lesson Checkpoint



1. In regards to COBRA, Agency Benefit Administrators are responsible for:
 - a. Sending the COBRA Notification Letters
 - b. Performing the COBRA enrollments
 - c. Sending the initial General Letter to the Employee and Spouse as part of onboarding



2. Eligible participants can enroll in COBRA coverage for _____ months.
 - a. 24
 - b. 12
 - c. 18



3. True or False. COBRA processing is centralized and handled by OHB.



Lesson Summary

11

COBRA Administration

In this lesson, you learned:

- An Overview of COBRA
- How to Monitor COBRA Eligibility and Status



Lesson

12

Affordable Care Act (ACA) Administration

This lesson covers the following topics:

- Overview of ACA Administration Process Flow
- Agency Responsibilities during ACA Reconciliation
- Generating the ACA Reconciliation Report
- Certifying the ACA Data



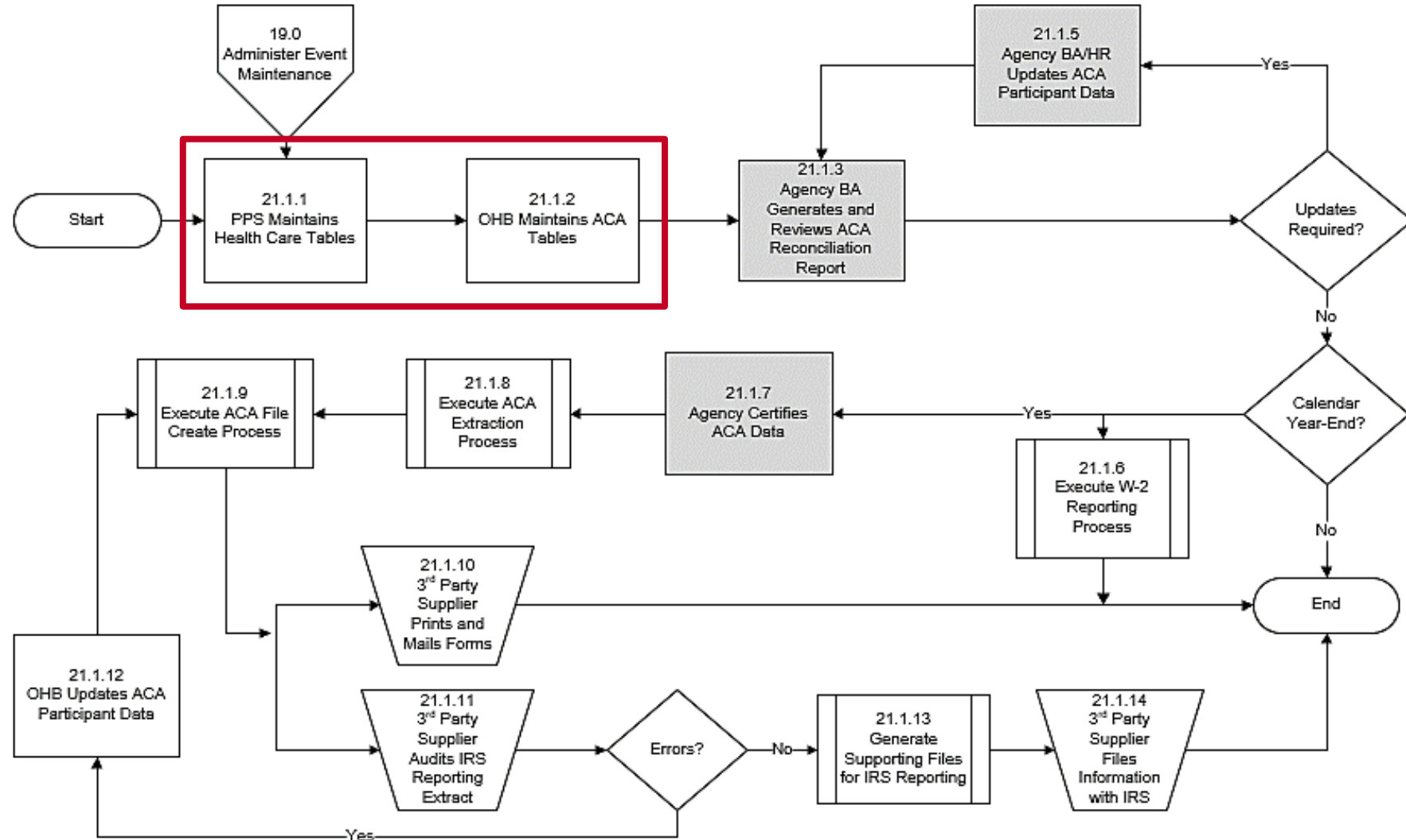
ACA Administration Overview

The **ACA Administration** business process involves:

- Capturing the data elements required to create annual regulatory forms for health benefit participants
- Capturing the data elements required to perform annual regulatory reporting to the Internal Revenue Service (IRS)



ACA Administration Process Flow





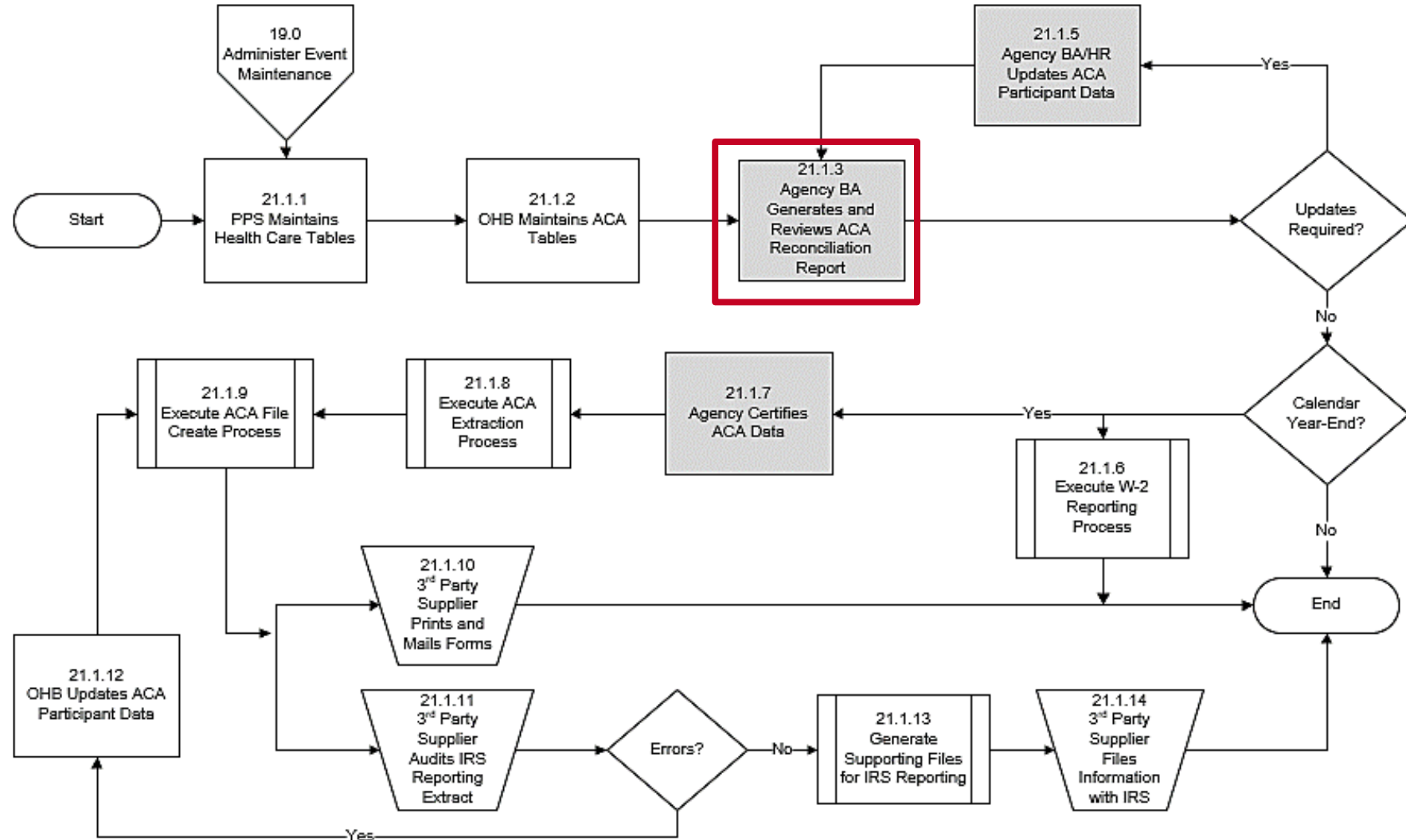
ACA Reconciliation Data Sources

Health Care Tables: Within Cardinal, the Health Care Tables are utilized to select the applicable plan and coverage code. These Tables are maintained by the Cardinal Post Production Support (PPS) Team.

ACA Tables: OHB maintains the ACA Tables which contain the approved ACA Health Benefit Plans.



ACA Administration Process Flow



Note: For agencies supported by DHRM Shared Services, the steps in gray will be completed by DHRM, not the agency BA.



ACA Reconciliation Report

The ACA Reconciliation Report is used to view data that identifies all employment and enrollment statuses for each participant and dependent by Month.

- It is recommended to run this report on a Monthly basis
- This report must be run on a Quarterly basis at a minimum and must be run twice in the last quarter of the Calendar Year and the ACA Certification must be completed

Navigator > Benefits > ACA Annual Processing > ACA Preparation > ACA Reconciliation Report

For more information and instructions on how to run this report, refer to the HCM Reports Catalogs. The HCM Reports Catalogs are located on the Cardinal Website in **Reports Catalogs** under [Resources](#).

Note: For Non Cardinal Payroll Agencies, this report is utilized to obtain the amounts that must be reported on the year-end W-2s for each employee. The healthcare premium amount (column L) is reported on the W-2, in box 12, with a code of “DD”. This process is completed by the Cardinal PPS Team.



Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Generating the ACA Reconciliation Report

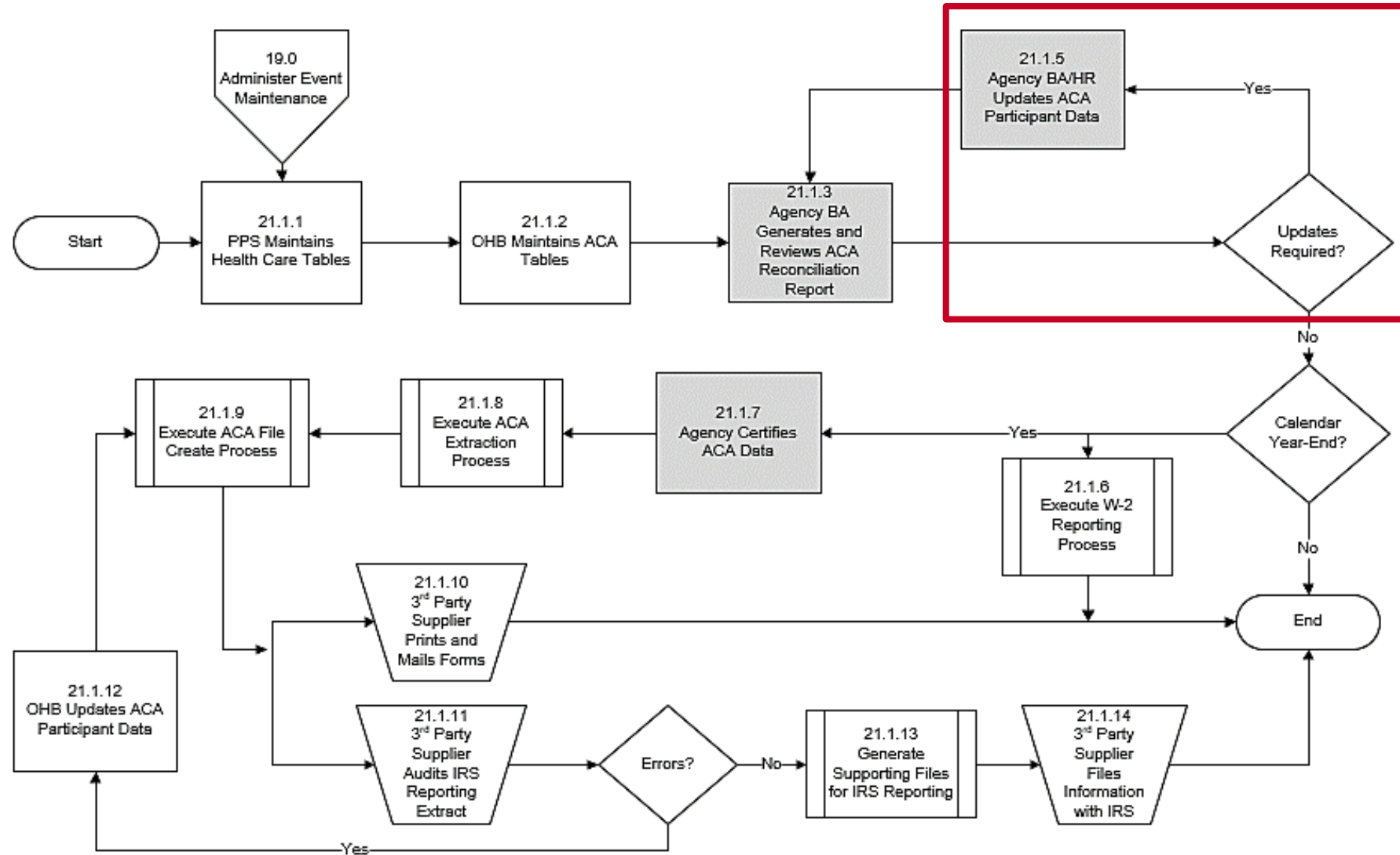


Sample ACA Reconciliation Report

1	ACA Reconciliation	83													
2	Instance = 1836904														
3	Company	Department ID	FEIN	SSN	Employee ID	Empl Record	Last Name	First Name	Middle Name	Sfx	Seq	ValHC	Dep DOB	Jan	Feb
4	A01	047001000	546001386		00270543600	2	DOE	JOHN			0	23814.00000		TF/E	TF/E
5	A01	047001000	546001386		00271365200	0	DOE	JOHN			0	12870.00000		TF/E	TF/E
6	A01	047001000	546001386		00370100100	0	DOE	JOHN			0	23814.00000		TF/E	TF/E
7	A01	047001000	546001386		00539022900	0	DOE	JOHN			0	23814.00000		TF/E	TF/E
8	A01	047001000	546001386		00539176300	0	DOE	JOHN			0	5645.00000		TG/E	TG/E
9	A01	047001000	546001386		00540667500	0	DOE	JOHN			0	0.00000		TG/E	TG/E
10	A01	047001000	546001386		00540931700	0	DOE	JOHN			0	23814.00000		TF/E	TF/E
11	A01	047001000	546001386		00540931700	0	DOE	JOHN	G		1	0.00000	10/12/2000	-/E	-/E



ACA Reporting Process Flow



Note: For agencies supported by DHRM Shared Services, the steps in gray will be completed by DHRM, not the agency BA.



Review and Update ACA Participant Data

Agencies review the ACA Reconciliation Report to identify if any updates are required. If discrepancies are identified, one of the following corrective actions may be required:

- The Agency HR and BN Administrators will work together to trigger a Benefit Event and then process the corrective enrollments
- Employees (participants) will only display on the ACA Reconciliation Report if they have a record on the **ACA Employee Eligibility** page. The participant's eligibility may need to be manually corrected on this page if they are not displaying on the ACA Reconciliation Report



ACA Employee Eligibility Page

ACA Employee Eligibility page guidelines:

- On the employee's hire date, a row is automatically added to this page (effective dated based on the hire date) with a status of "Eligible" unless the hire date is the first of the Month. In these cases, only one row will be automatically added and the status will be "Always Eligible"
- For all hire dates other than the first of the Month, once the employee's elected benefits become effective, another effective dated row is added to this page with a status of "Always Eligible"
- If the employee is not eligible for health coverage, their status will be "Ineligible"

Navigator > Benefits > Employee/Dependent Information > ACA Employee Eligibility



Sample ACA Employee Eligibility Page

Always Eligible ▼

Always Eligible

Eligible

Excluded

Ineligible

To be determined

Benefits Administrator

ACA Employee Eligibility

New Window | Help | Personalize Page

ACA Employee Eligibility

Affordable Care Act Common ID DOT VA Dept of Transportation

Employee ID

Eligibility Information

*Effective Date 02/01/2020

*ACA Eligibility Status Always Eligible

Average Service Hours 0.000

Calculation Method Look Back

Evaluation Begin Date

Administration Begin Date

Stability Begin Date

Effective Sequence 0

☐ Non-Assessment Period

Work Period Monthly

Measurement Period

Evaluation End Date

Administration End Date

Stability End Date

ACA Calculation Hours

Empl Record	Company	Description	Total Hours
0			

Total Eligibility Hours

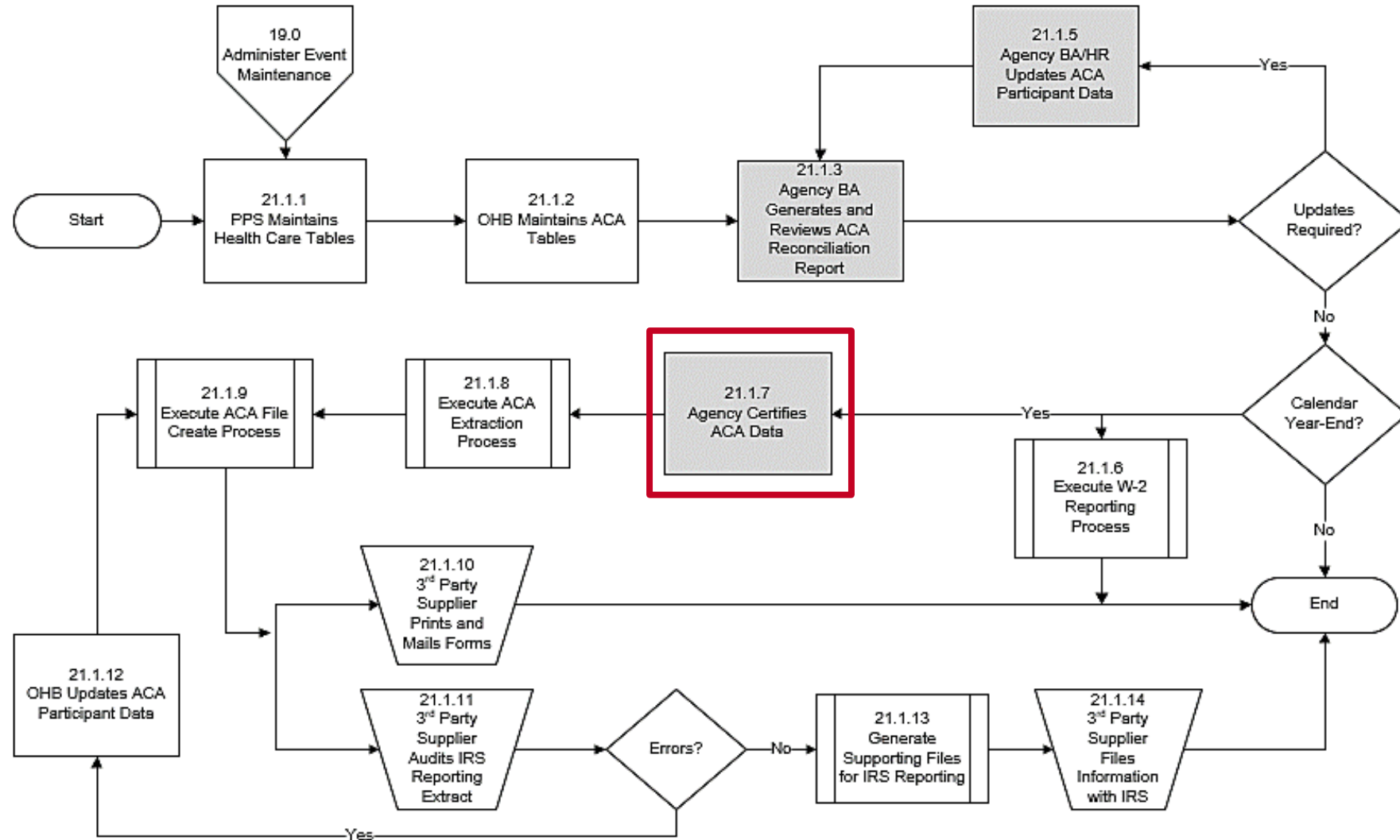
Last Update User ID BATCH

Updated on 06/04/2020 12:33:06PM

OK Cancel Apply



ACA Reporting Process Flow



Note: For agencies supported by DHRM Shared Services, the steps in gray will be completed by DHRM, not the agency BA.



ACA Certification

The ACA Reconciliation Report must be certified by the Agency during the last quarter of the Calendar Year.

Once the ACA Reconciliation Report has been reviewed and all discrepancies have been updated (corrected), the Agency Benefits Administrator must certify the ACA data.

Certification is completed on the **ACA Data Entry** page. This process will include:

- Defining the Agency Contact
- Entering the total Full-Time and total employee counts for each Month of the Calendar Year
- Completing the Certification Statement

Navigator > Benefits > Employer Information > ACA Data Entry

For more information and instructions on how to complete the ACA certification, refer to the Job Aid titled BN361_ACA Data Entry. This Job Aid is located on the Cardinal Website in **Job Aids** under [Learning](#).



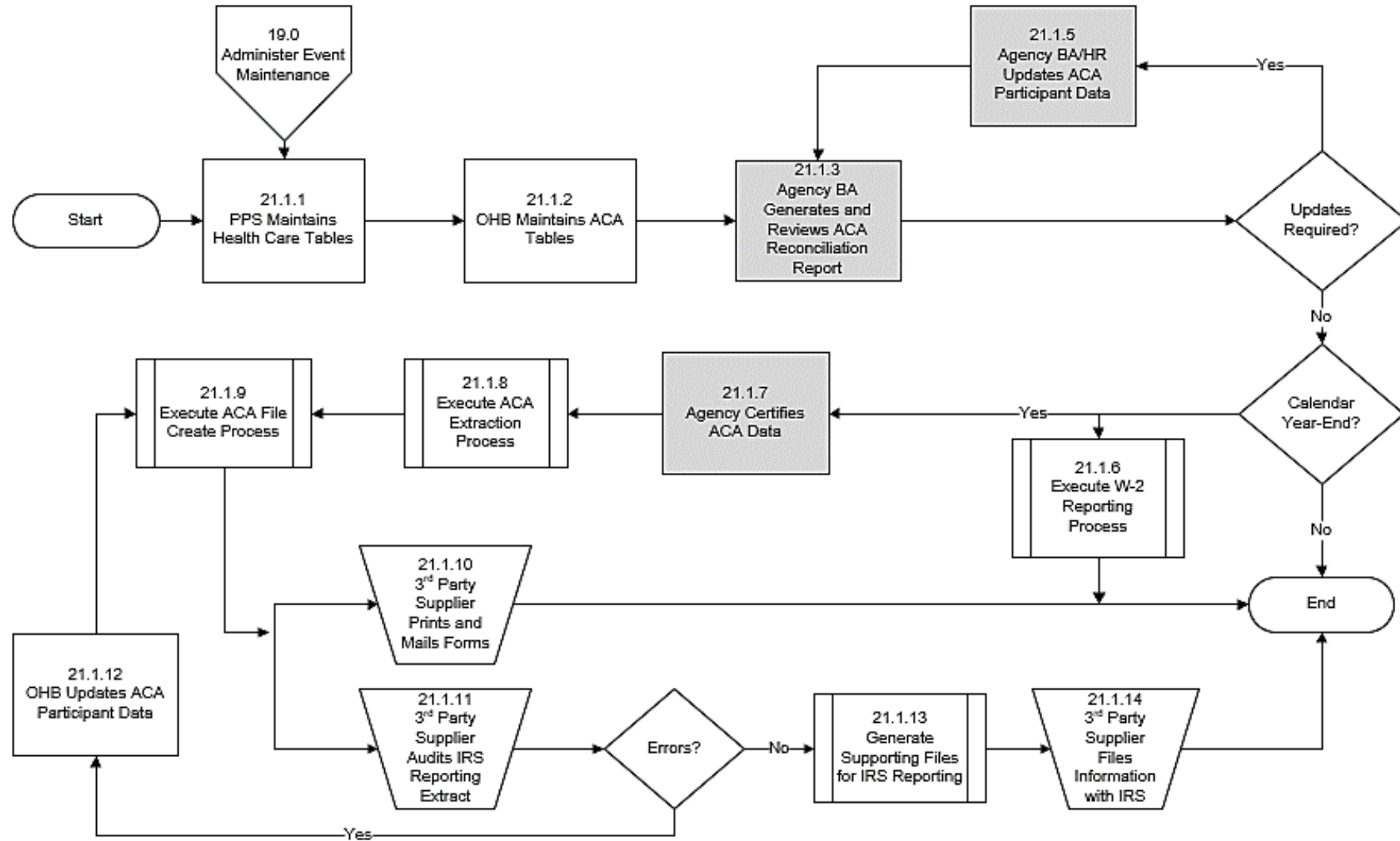
Demonstration

In this demonstration, the Instructor will demonstrate the following:

- Completing the **ACA Data Entry** page certification



ACA Reporting Process Flow



Note: Once Agency certification is complete, OHB, the 3rd Party Supplier(s), and the Cardinal PPS Team will complete the rest of the ACA Calendar Year-End processing.



Lesson Checkpoint

Now is your opportunity to check your understanding of the course material. Read the question and make note of your answer below.



1. An employee will only get picked up by the ACA Process if he/she has a record set on the ACA Employee Eligibility page.
 - a. True
 - b. False



2. How often should the ACA Reconciliation Report be run by Agency Benefit Administrators?
 - a. Monthly
 - b. Weekly
 - c. Daily
 - d. Yearly



Lesson Summary

12

Affordable Care Act (ACA) Administration

In this lesson, you learned:

- Overview of ACA Administration Process Flow
- Overview of the Agency Responsibilities during ACA Reconciliation
- How to generate the ACA Reconciliation Report
- How to certify the ACA Data



Course Summary

HR352

HCM Cardinal Employee Data Setup and Maintenance

In this course, you learned:

- The importance of effective dating
- There is a relationship between position, job data, personal data, and job record
- How to hire and rehire an employee online
- How to process leaves of absences
- How to process separations



Course Summary

BN361

Cardinal Employee Benefit Enrollment and Maintenance

In this course, you learned:

- An overview of Cardinal and Benefits
- The key concepts pertaining to Benefit Events and Programs
- An overview of Benefits navigation
- How to process New Hire Enrollments and Manual Benefit Events
- How to view other Employee and Dependent Benefits information
- How to administer COBRA
- How to administer ACA Administration