

## **Employee Event Detail Page Overview**

This Job Aid provides guidance on how to review details related to the nature and status of a Benefit Event on the **Employee Event Details** page. This page is also helpful when troubleshooting Benefit Event errors.

This page includes the following:

- Event, Eligibility, and Processing Information
- Information related to Plan Types
- Option and Cost information associated with elected plans and coverage codes

**Navigation Note**: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This "Notify" functionality is not currently turned on to send email notifications to specific users within Cardinal.

## Table of Contents

Revision History	2
Employee Event Detail Page	3
Participants	5
Plan Type	8
Option and Cost	10



## **Revision History**

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



## **Employee Event Detail Page**

To view relevant details related to the nature and status of a Benefit Event, the Agency Benefit Administrator would access the **Employee Event Detail** page.

Step	Action
1.	Navigate to the Employee Event Detail page using the following path:
	NavBar > Menu > Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail

The Employee Event Detail Find an Existing Value page displays.

( <del>(</del>	Cardinal Homepage Event Detail
Em	iployee Event Detail
Fir	nd an Existing Value
∽ § Ent	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
	Schedule ID begins with V
	Empl ID begins with v Q
	Benefit Record Number =
	Event Identification =
	Benefit Program begins with v Q
	Search 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 or select the appropriate Schedule ID using the Schedule ID Look Up icon.
	Schedule ID begins with 🗸 Q
i	To see all Benefit Events for an employee, leave the <b>Schedule ID</b> field blank. In most cases the value will be "EM00" unless viewing Open Enrollment Benefit Events.
3.	Enter or select the applicable Employee ID using the Empl ID Look Up icon.
	Empl ID begins with 🗸



4. (	Click the Sea	Search	Clea				
The Employ	yee Event D	Search	Clea				
The Emplo	yee Event D			ir			
Part Event In		etails page o	lisplays with t	he <b>Parti</b>	i <b>cipant</b> tab s	selected.	
Event ir	ticipant Plan <u>T</u> ype	Option and Cost					
Event Ir	Sched ID EM00 F	Event Maintenance				Benefit Reco	rd 0
Lvent	Information					Eligibility Information	
	ID 4		Empl Record	0		Empl Record	0
	Status Closed to Pro	cessing	Empi Record Date	10/01/2023		COBRA Action	
	Class BIR Birth or /	Adoption	Effseg	0		Addr Effdt	02/09/2023
	Source Manual Event	1	Priority	410		Job EffDt	09/29/2023
	Multi-Activ	rity Indicator				Effseq	0
Process	sing Information						
	Benefit Program	SAL Salaried Employee	Benefit Pgm	Add	dress Eligibility Chang	ed	
	Process Status	Finalized - Enrolled	-	Mult	tiJob Indicator Chang	ed	
	Status Date	11/02/2023		Job	Eligibility Changed		
	Process Indicator	Normal Processing		Eve	nt Out of Sequence		
	Election Source	Online		Eve	ent Disconnected		
	Excess Credit	Forfeit Excess Credits		Ava	ulable through Self Se	rvice	
	Option Notify	10/27/2023	Election Rovd 10/2	7/2023 Elha	anzerAppiy Defaults		
	Confirm Notify	11/02/2023	Confirm Rovd	_			
	Suppress Forms	Print Both Forms		Enrl	I/Print Days 0		
	Numerous Be	enefit Events	can occur sin	nultaneo	ously, all in v	varving points i	n the process wit

The following sub-sections within this Job Aid provide an overview of the information available for review on each of the tabs contained on this page.



#### **Participants**

The **Participants** tab reflects various information related to a Benefit Event. There are several important items on the **Participants** tab for the Agency BA to understand:

Step	Action							
	The Event Information section:							
	<ul> <li>a. Event Status: Identifies the current status for the Benefit Event ("Open", "Closed", "Disconnected", or "Voided"</li> <li>b. Event Source: Displays the trigger for the Benefit Event such as a changed employee address, job information, Medicare updates, or the insertion of a manual Benefit Event. Note that this field does not distinguish between a manual Benefit Event such as Birth entered by the employee in ESS or a BIR Benefit Event created</li> </ul>							
i	Event Information							
	ID 4 Empl Record	0						
	Status Closed to Processing Date	10/01/2023						
	Class BIR Birth or Adoption Effseq	0						
	Source Manual Event Priority	410						
	Multi-Activity Indicator							



Step	Action
	The Eligibility Information section:
	a. Emp Rcd: Displays the Employee Record of the job used to determine eligibility
	<ul> <li>b. COBRA Action: If the Benefit Event is associated with an action that may make the employee eligible for COBRA coverage, the system displays that action code (e.g., DIV, TER)</li> </ul>
A	<ul> <li>Address Effdt: Displays the effective date of the address (state or postal code) used to evaluate eligibility</li> </ul>
	d. Job Effdt: Displays the effective date of the job data used to evaluate eligibility
	Eligibility Information
	Empl Record 0
	COBRA Action
	Addr Effdt 02/09/2023
	Job EffDt 09/29/2023
	Effseq 0
	The Processing Information section:
	a. <b>Processing Status</b> : Indicates the step that the Benefit Event is at in the Ben Admin process. This status changes as the Benefit Event moves through the process.
	("Prepared", "Notified", "Entered", "Finalized-Enrolled")
	<ul> <li>Status Date: Displays the date that the Benefit Event moved to the process status indicated</li> </ul>
	c. <b>Election Source</b> : This field identifies how the election was made. "Online" indicates
Í	indicates that the employee made the election through Employee Self-Service (ESS).
	"None" indicates that the Benefit Event was finalized with no elections entered d. <b>Confirm Notify</b> : Displays the date that the system sent an email notifying the
	employee that a Confirmation Statement is available to view online
	Processing Information Renefit Program SAL Salaried Employee Renefit Prom
	Process Status Finalized - Enrolled Status Date 11/02/2023
	Process Indicator Normal Processing Election Source Online
	Excess Creat     Forfeit Excess Credits       Option Notify     10/27/2023       Confirm Notify     11/02/2023       Confirm Notify     11/02/2023
	Suppress Forms Print Both Forms



Step	Action
	There are a series of checkboxes or "flags" that reflect the type of changes made to an employee's data that may impact benefit eligibility. The BA can review the information shown under this section and interpret what each possible "flag" means:
	<ul> <li>Job or Address Eligibility Changed: The system flags these events when the HR data used for processing event eligibility is changed, a new row affecting eligibility is inserted, or the row used for eligibility is deleted</li> </ul>
<b>f</b>	b. Event Out of Sequence: The Event Out of Sequence flag refers to Benefit Events that have been processed out of order according to their effective date or priority. An out of sequence Benefit Event might need to be reprocessed because an earlier, opened Benefit Event might have changed the defaults, eligibility, or event rule processing results for the later, closed Benefit Event
	c. Event Disconnected: The Event Disconnected flag generally refers to open or closed Benefit Events based on job rows that have been deleted. It can also refer to an open Benefit Event where the BAS Group ID has been changed.
	Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Event Disconnected Available through Self Service Finalize/Apply Defaults
	Enrl/Print Days 0



### Plan Type

The **Plan Type** tab is used to view information for each Plan Type. Use the arrow keys to toggle between the different plan types for the employee. In addition, users can click on the **Dependents** hyperlink to view the names of the dependents that the employee is covering.

Step	Action	
1.	Click the <b>Plan Type</b> tab.	
	Participant Plan Type Option and Cost	
The <b>Pla</b>	<b>n Type</b> page displays.	
	Participant Plan Type Option and Cost	
	Sched ID EM00 Empl ID Ben Record 0 Event ID 4	
	Plan Types Q   I I 2 of 18 View All	
	Plan Seq     10     Plan Type     10 Medical       Option Code     43     Benefit Plan     ACC4     Coverage Code     3       Curr Election     Yes     Elections Allowed     Coverage Begin     10/01/2023       Enroll Action     Enroll     BAS Error     Deduction Begin     10/01/2023       Ignore Plan     No     Proof Received     Coverage Elect     11/02/2023	
	Dependents Group Header 1	
	Flat Amount	
	Group Header 2         Savings Coverage         Flat Amt         Savings Coverage After-Tax         Flat Amt         Ann Excess Credits           Deduct Amount         Deduct Amount ATax         % of Gross         % of Gross ATax         Investments	
	Plan Type BTax     Plan Type ATax       Benefit Plan BTax     Benefit Plan ATax       Ded Code BTax     Deduction Code ATax       Ded Class BTax     Deduction Class ATax	
	Group Header 3	
	Employee Contribution Ann Excess Credits FSA Annual Pledge	
	Group Header 4	
	Pension Base Voluntary Amount Voluntary Percent Group Header 5	
	Vacation Hours Vacation Buy Amount Vacation Sell Amount Goal Amount	
	Group Header 8 Effdt Effect On Billing N None % of 0 Employee Rate Plus \$0.00	
	Return to Search     Previous in List     Next in List       Participant     Plan Type     Option and Cost	



Step	Action							
	Review th	e following	g informatio	on on this ta	b for each	Plan Type:		
1	<ul> <li>a. Curr Election: Indicates that an employee kept their current election</li> <li>b. Enroll Action: The action taken by the Benefit Event for the plan type. "Enroll" indicates there was an election made. None" indicates that no election was made. "Terminate" indicates that the prior election was terminated</li> <li>c. Coverage Elect: Indicates if the employee made an election, waived, or terminated t benefit</li> <li>d. Benefit Plan: Displays the Benefit Plan that the employee enrolled in</li> <li>e. Coverage Code: Displays the coverage level that the employee selected</li> <li>f. Coverage Begin: Displays the effective date of the coverage</li> <li>g. Deduction Begin: Displays the date payroll deductions begin</li> <li>h. Coverage Elect: Displays the date that the Benefit Event was finalized. This date matches the election date on the base benefit pages</li> </ul>							
	Plan Types					Q	2 of 18 🖌 🕨	View All
		Plan Seq	10	Plan Type	10 Medical			
		Option Code	43	Benefit Plan	ACC4		Coverage Code	3
		Curr Election	Yes		Elections Allo	wed	Coverage Begin	10/01/2023
	L	Enroll Action	Enroll		BAS Error	s	Deduction Begin	10/01/2023
		Ignore Plan	No		Proof Receive	d	Coverage Elect	11/02/2023
	C	overage Elect	Elect				Addl Pay Eff	
	Dependents							



### **Option and Cost**

Use the **Option and Cost** tab to review the cost of the plans elected by the employee. This tab shows the cost associated with the plan and the coverage code that was elected.

)	Actio	n								
١.	Click on the <b>Option and Cost</b> tab.									
	Ea	articipant	P	lan Type	<u>O</u> ptio	n and Cost				
Opti	ion and	d Cost	tab disp	olays.						
	Participan	t Plan I	/pe Optic	on and Cost						
		Sched ID	EM00		Ben Record	0 Ev	vent ID 4			
	Plan Types						Q	4 4 2 of 16	5 🗸 🕨 🕨 I View All	
		Plan Seq	10	F	Plan Type Medic	cal				
	Options				Q    4 4 of 53 V       View All					
	Option Seq 44 Benefit Plan ACC4			Option ID 45 Coverage Code Self + Child			Option Type Option			
							Default Election			
	6	Option Code	43	Option Level 1 Premium Base			Proof Required			
		Dedn Class	Before-Tax				History Only			
	Applies T	o Pay Period	ls							
	🖾 Firs	t	Second	J Third Fourth			🗍 Fifth			
	Option Co	st								
	Cost ID	Cost Type		Annual After Tax	Annual Before Tax	Annual ER	After Tax Deduction	Before Tax Deduction	Employer Deduction	
	43	Price			\$3,852.00	\$15,840.00		\$160.50	\$660.00	
	Return to Se	earch Pr	evious in List	Next in List	Notify					