



Creating and Completing a Life Event on Behalf of an Employee Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to create and complete a manual Benefit Event (Life Event) on behalf of the employee.

This process is utilized when the employee does not initiate the qualifying Life Event through Employee Self-Service (ESS).

This Job Aid also contains sections that provide the step-by-step instructions utilized by an Agency BA to complete the following after the Benefit Event is completed and finalized:

- Viewing the employee’s benefits information to validate accuracy
- Viewing/printing the Confirmation Statement for the employee

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
12/8/2025	Notes added in all sections to provide additional information regarding the Schedule/Prepare Activity button. Language added regarding the use of special characters in name fields.
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Steps 1 and 12; Section 2, after Steps 1 and 11; Section 3, after Steps 1, 11, 43, 54, 88, and 98; Section 4, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



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Adding Dependent(s)

This section of the Job Aid should be referenced when creating and processing a Life Event on behalf of the employee wherein one or more dependents is being added to the employee's coverage (marriage, birth, adoption, etc.). The steps included in this section of the Job Aid are based on the following example scenario.

Scenario: An employee got married on 12/16/2022. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 12/19/2022 to add their spouse as a dependent and enroll them in their benefits. Additionally, a stepchild will be added and enrolled in the employee's benefits. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being added to the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

Step	Action
1.	Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Find an Existing Value** page displays.

← Cardinal Homepage

Benefit Event Entry

Benefit Event Entry

Find an Existing Value

▼ Search Criteria

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

🕒 Recent Searches

Choose from recent searches

✎

🔖 Saved Searches

Choose from saved searches

✎

Empl ID

begins with

Benefit Record Number

=

Empl Record

=

First Name

begins with

Last Name

begins with

Business Unit

begins with

Department

begins with

^ Show fewer options

☐ Case Sensitive

☐ Include History

☐ Correct History


Search

Clear

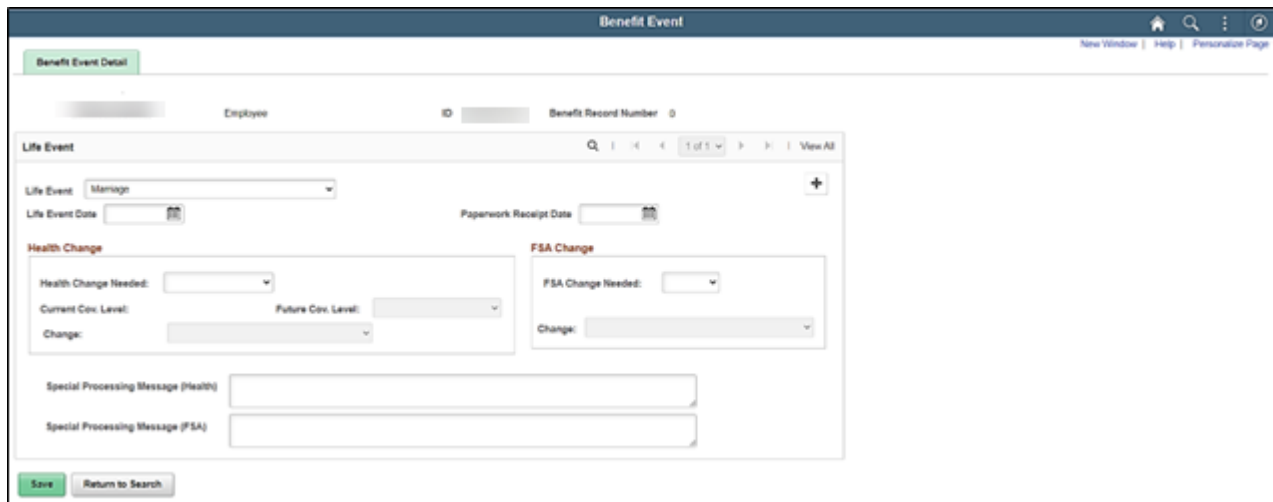


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Step	Action
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	<p>Enter the employee's Employee ID in the Search by field.</p> <p>Note: The other search by options available (Search by dropdown button) are Business Unit, Department, and Name.</p> <div data-bbox="256 636 995 703"> <p>Search by: Empl ID begins with <input type="text"/></p> </div>
3.	<p>Click the Search button.</p> <div data-bbox="256 789 969 890"> <p><input type="button" value="Search"/> <input type="button" value="Clear"/></p> </div>

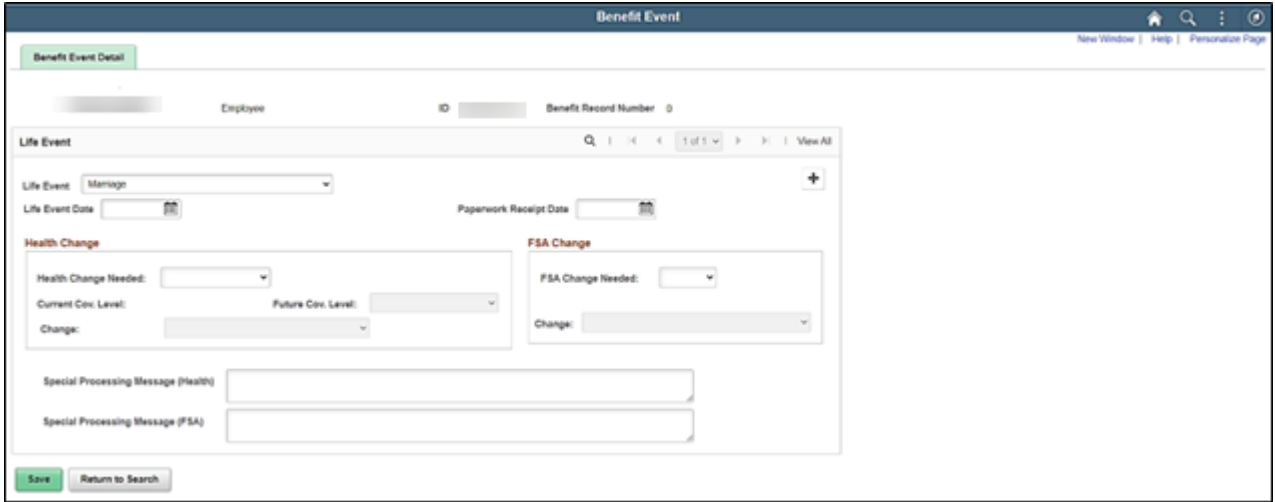






The **Benefit Event** page displays for the applicable employee.



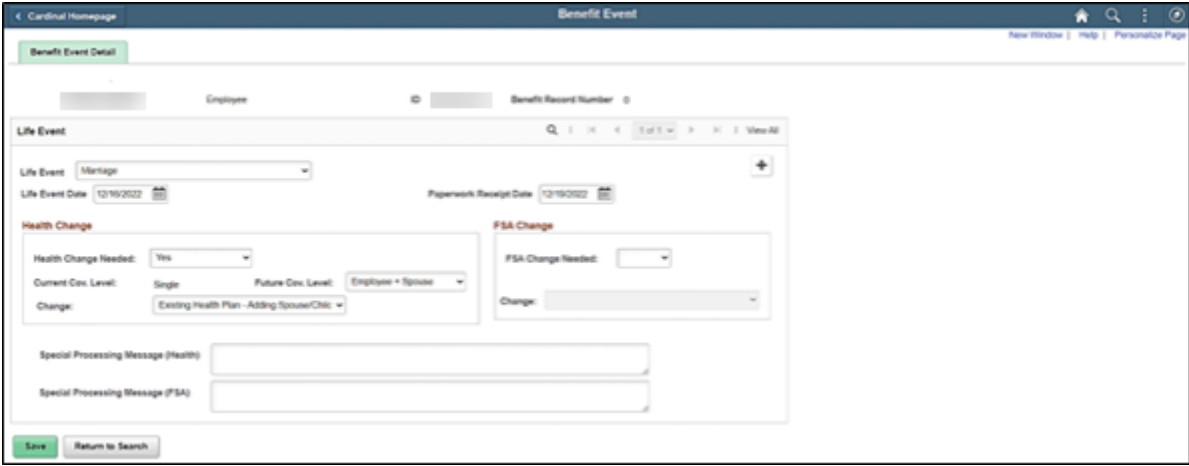





4.	<p>Click the Life Event dropdown button and select the applicable Life Event ("Marriage" in this scenario).</p> <div data-bbox="264 1591 889 1646"> <p>Life Event <input type="text"/></p> </div>
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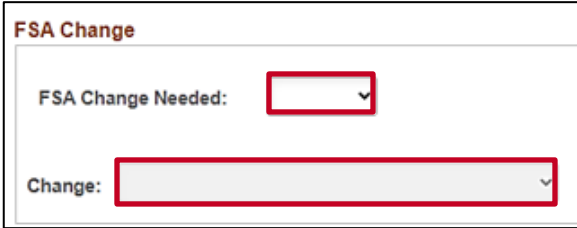
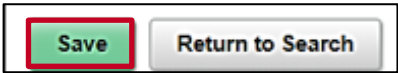

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Step	Action
	<p>The Benefit Event page redisplay with the selected Life Event.</p> 
5.	<p>Click the Life Event Date Calendar icon and select the applicable date.</p> 
	<p>This is the date of the actual event (marriage, birth, divorce, etc.).</p>
6.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date.</p> 
	<p>This is the date that the Benefits Enrollment form was received from the employee.</p>
7.	<p>Click the Health Change Needed dropdown button and select “Yes”.</p> 
	<p>Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes” (e.g., this is a birth event, and the employee is already enrolled in “Family” coverage. However, a new dependent is being added (newborn)). If “Yes” is not selected, a Benefit Event will not be created.</p>

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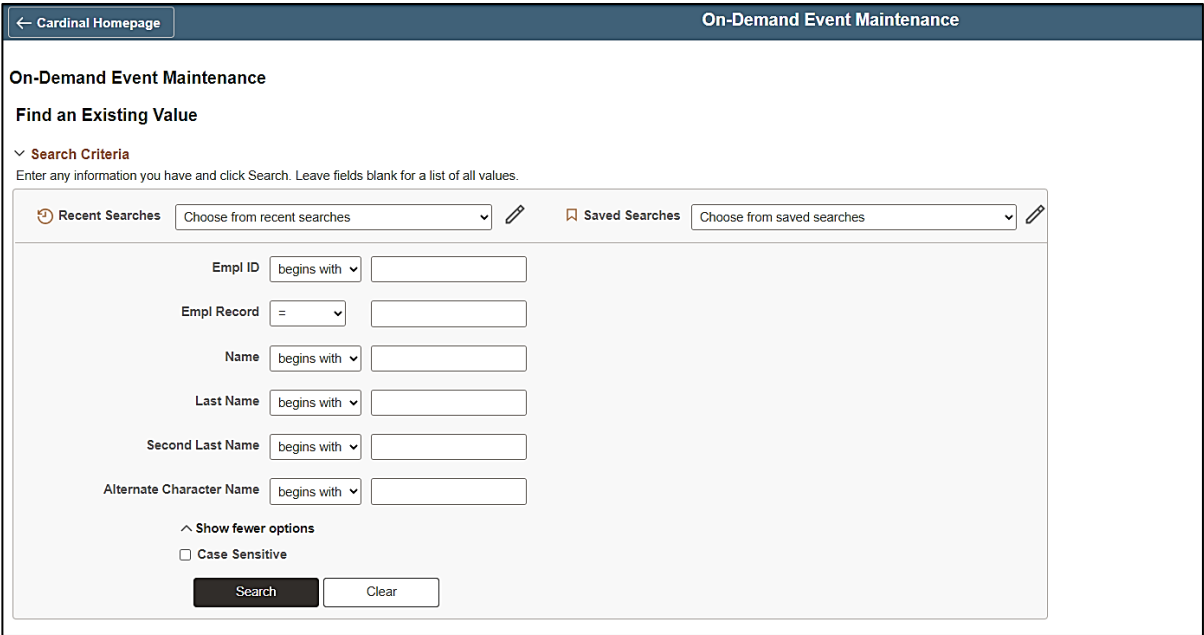



Step	Action
	<p>The Benefit Event page refreshes.</p> 
	<p>The Current Cov. Level field auto-populates with the employee's current Health Plan enrollment coverage level.</p>
8.	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> 
	<p>The coverage levels available for selection are "Single, Employee", "Employee + Spouse", "Employee + CH (Child)", and "Family". Please note that this does not actually change the employee's enrollment. This will be done when the Life Event is processed.</p>
9.	<p>Click the Change dropdown button and select "Existing Health Plan – Adding Spouse/Children".</p> 
	<p>The selections available will vary based on the type of Life Event previously selected.</p>

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Step	Action
10.	<p>Complete the fields within the FSA Change section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee's FSA elections will be made for this scenario).</p> 
11.	<p>Click the Save button.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions.</p> <p>If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
12.	<p>Navigate to the On-Demand Event Maintenance page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>



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Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> <div></div>
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
13.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> <div></div>
14.	<p>Click the Search button.</p> <div></div>

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Step	Action
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The **On-Demand Event Maintenance** page displays for the applicable employee.



15. Review the **Activity Date** field.



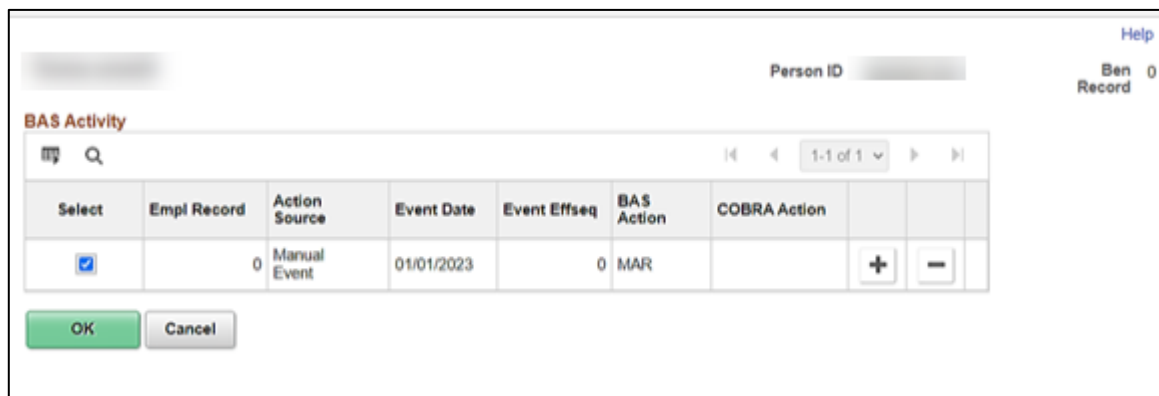

For Life Events, this date will auto-populate based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a marriage, so the **Activity Date** field defaults to the first day of the month following the date of marriage). Ensure that this date is accurate.

The **Source** field will be "Manual Event". The **Action** field will default based on the type of Life Event ("MAR" for Marriage in this scenario).

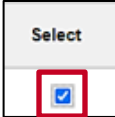

16. Click the **Show Activities** button.



The **BAS Activity** page displays in a pop-up window.




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Step	Action
17.	Ensure that the Select checkbox option for the applicable Manual Benefit Event is selected. 
18.	Click the OK button. 

The **On-Demand Event Maintenance** page redisplay.




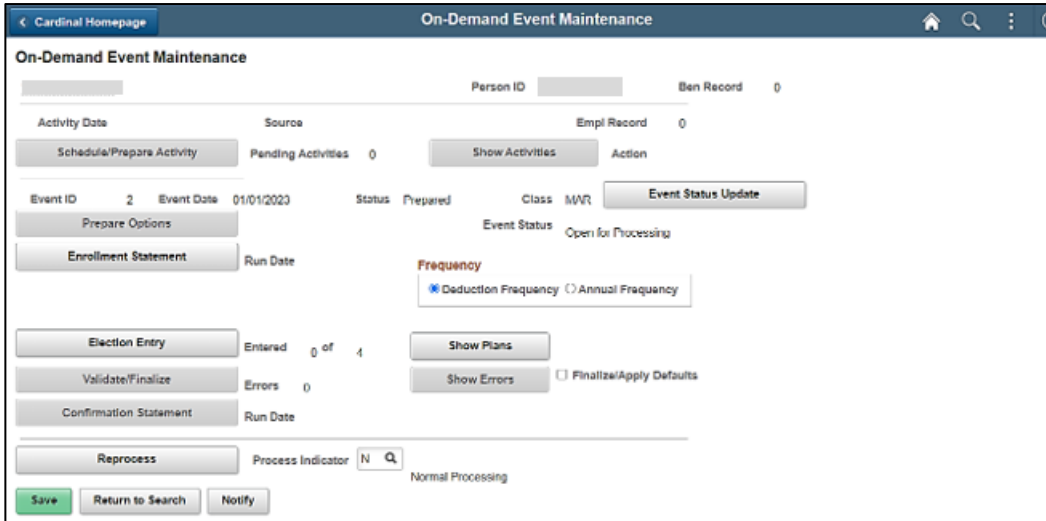
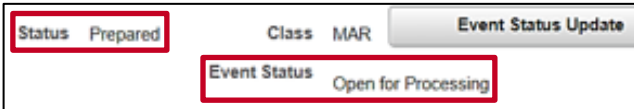

19.	<p>If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a “0”. In this case, proceed to Step 22.</p> <p>If the Pending Activities field displays a “1”, click the Schedule/Prepare Activity button.</p> <p>Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity.</p> 
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A **Confirmation** message displays in a pop-up window once the automated program completes.

Process completed successfully. (3000,530)

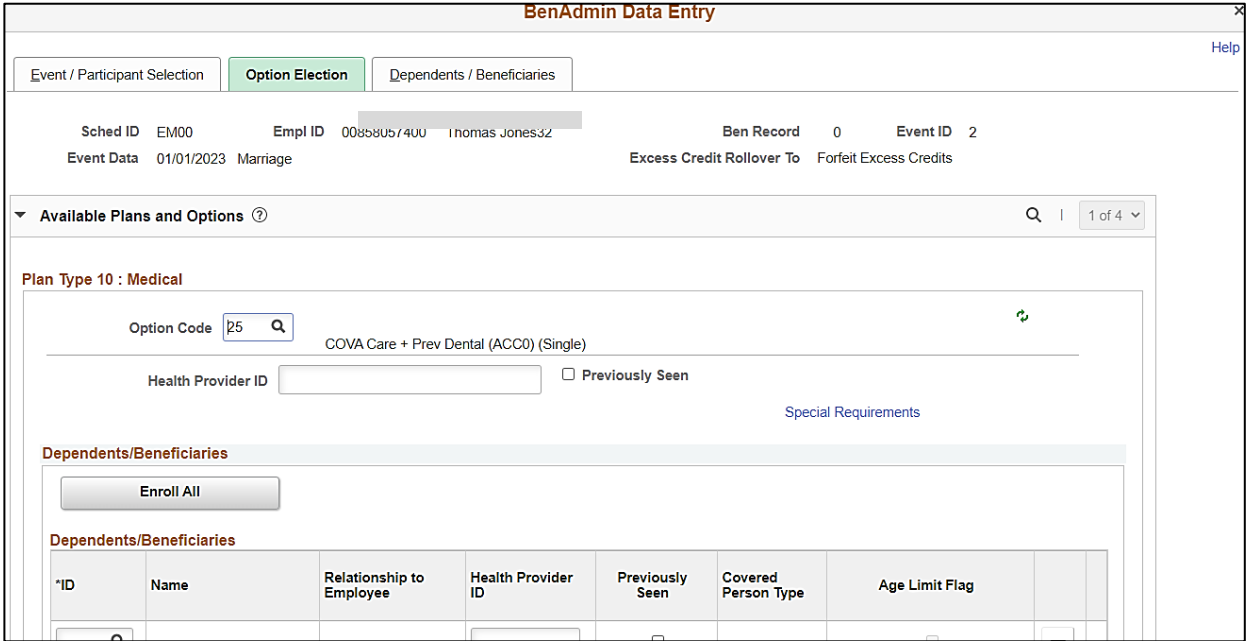

OK

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Step	Action
20.	<p>Click the OK button.</p> 
<p>The On-Demand Event Maintenance page redisplay.</p> 	
21.	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p>  <p>If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.</p>
22.	<p>Click the Election Entry button.</p> 



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Step	Action
	<p>The Election Entry page displays in a pop-up window with the Option Election tab displayed by default.</p> 
23.	<p>Select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the Option Code Look Up icon (magnifying glass) within the Plan Type 10: Medical section and select the applicable Option Code based on the coverage being elected.</p> <p>Select the same Benefit Plan that the employee is currently enrolled in but with the new Coverage Code (based on the employee's Benefits Enrollment form) by clicking the corresponding link in the Option Code column (Benefit Plan "ACC0" with Coverage Code "4" will be selected in this example as this is a marriage and the employee is adding the spouse and a stepchild).</p> <p>The Coverage Codes are as follows:</p> <ul style="list-style-type: none">• 1 – Single• 2 – Employee + Spouse• 3 – Employee + Child (except for Tricare)• 4 – Employee + 2 or More Dependents (Family – except for Tricare)• 8 – Employee + Child(ren) (Tricare only)• 9 – Family (EE + SP + Child/ren for Tricare only) 



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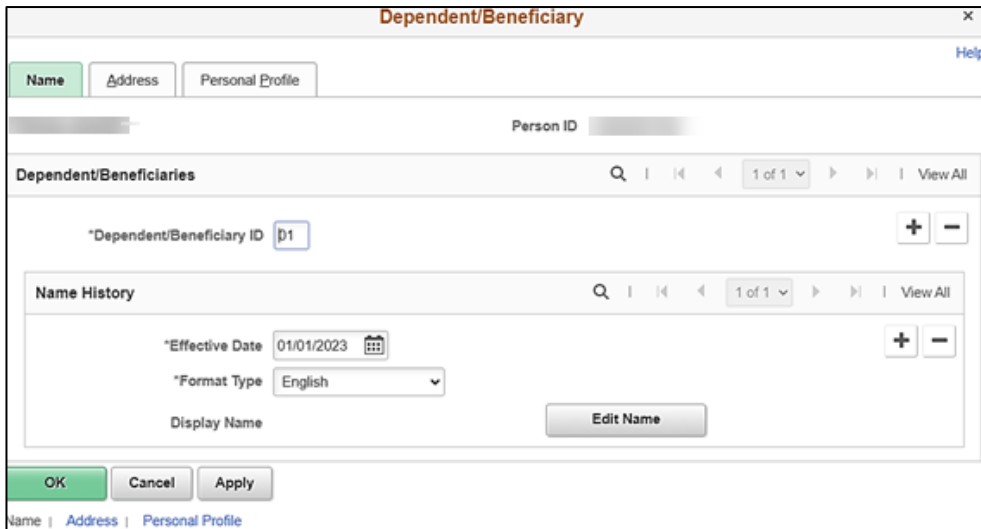


Step	Action
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The **Option Election** tab redisplay.

24. Click the **Dependents / Beneficiaries** tab to add the new dependent(s).

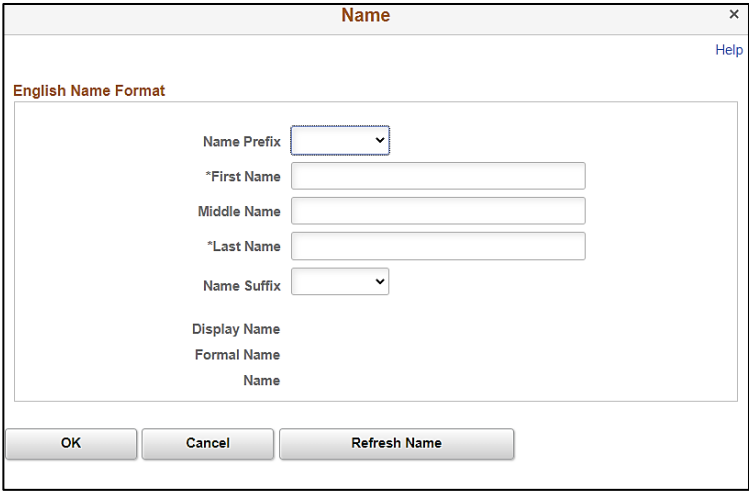


The **Dependent / Beneficiaries** tab displays.

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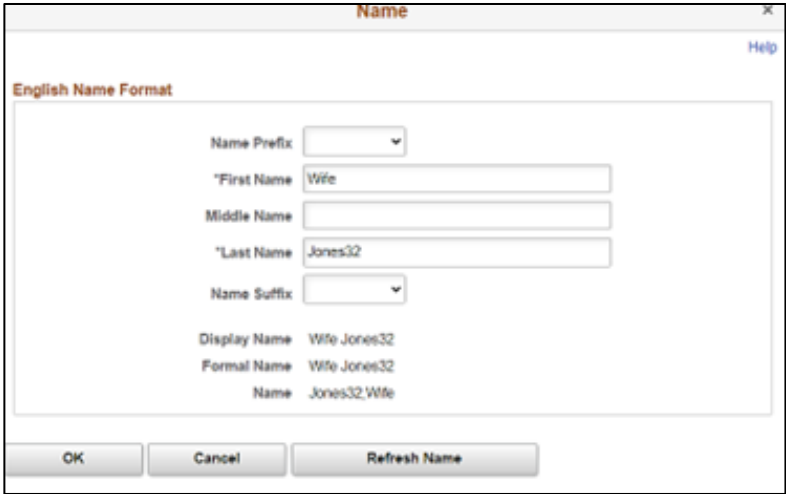


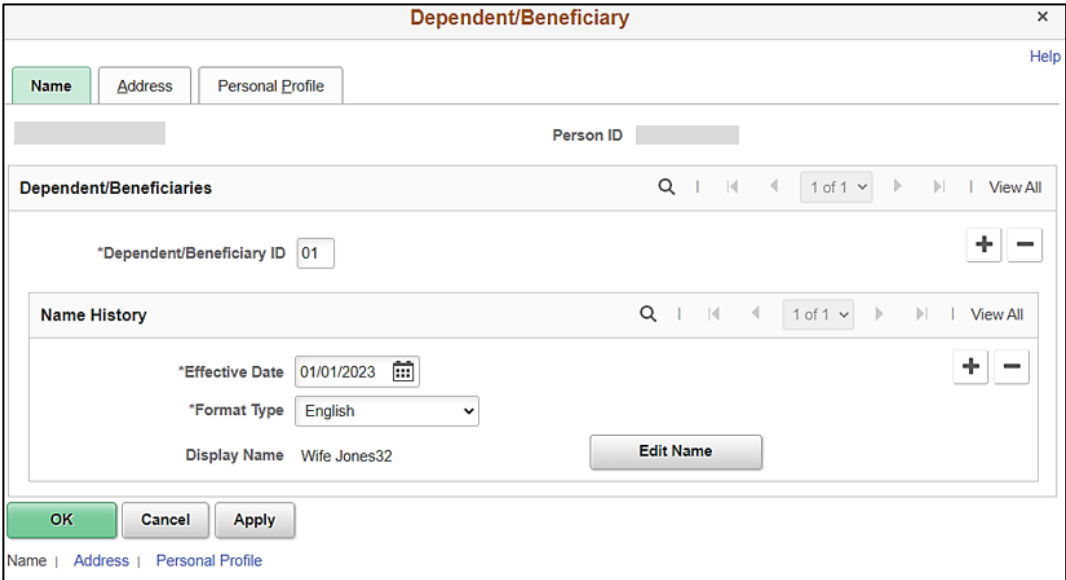
Step	Action
25.	<p>Click the Change/Add Dependent Data link.</p> 
<p>The Dependent/Beneficiary page displays in a pop-up window with the Name tab displayed by default.</p> 	
	<p>For Life Events, the Effective Date field defaults to the date that the coverage will begin (in this scenario, the Life Event is a marriage, so the Effective Date field defaults to the first day of the month following the date of marriage). Do not change this date as it must match the Event Date or the system will not recognize this dependent as eligible for coverage.</p> <p>The Dependent/Beneficiary ID field will default to the next available Dependent/Beneficiary ID number ("01" in this scenario) and increment by 1 for each additional dependent subsequently added.</p>
26.	<p>Click the Edit Name button.</p> 





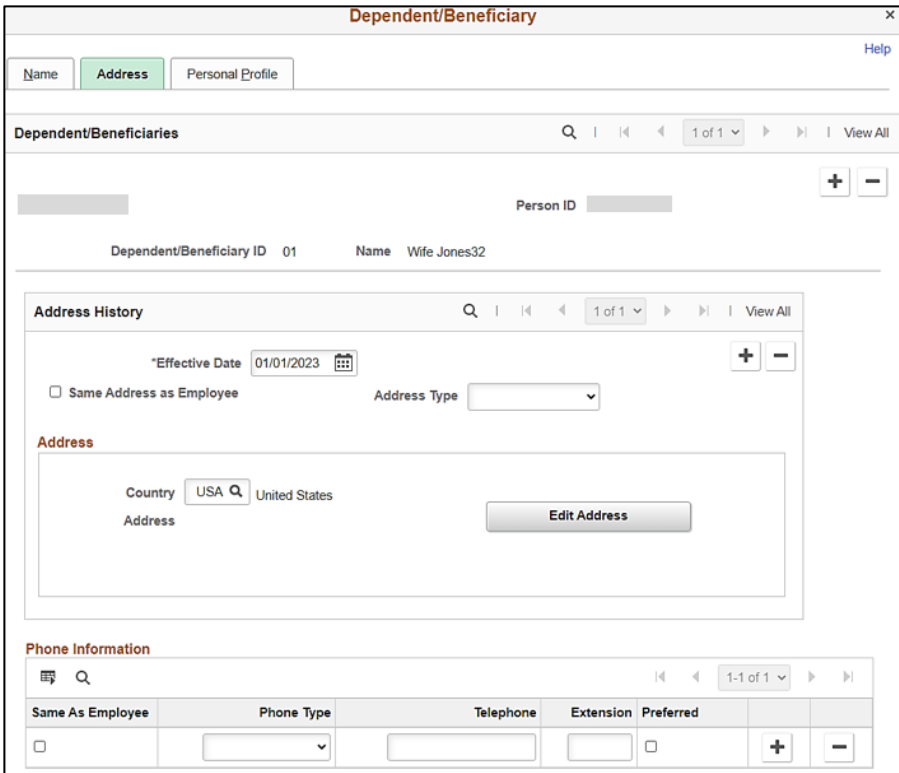
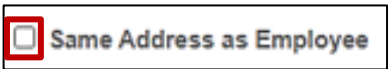


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Step	Action
	<p>The Name page displays in a pop-up window.</p> 
27.	<p>At a minimum, enter the dependent's first and last name in the corresponding fields. The Name Prefix, Middle Name, and Name Suffix fields are optional but should be entered as applicable.</p> <p>Note: Do not use accent marks or special characters in the name fields. These are not recognized and can cause errors when uploading to the Vendor.</p> 
28.	<p>Click the Refresh Name button.</p> 

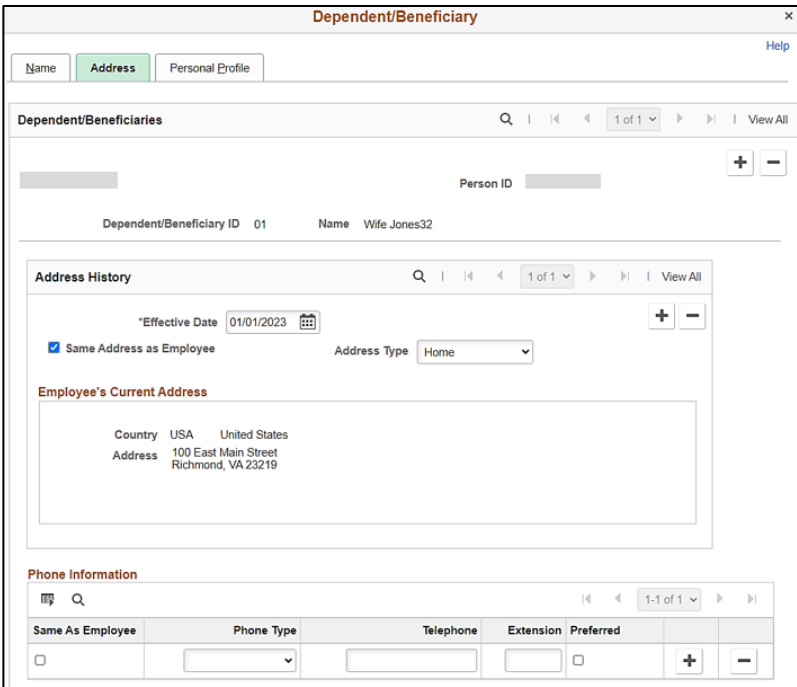


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Step	Action
	<p>The Name page refreshes.</p> 
	<p>The Display Name, Formal Name, and Name fields will populate based on the name information entered.</p>
29.	<p>Click the OK button.</p> 
	<p>The Name tab redisplay.</p> 

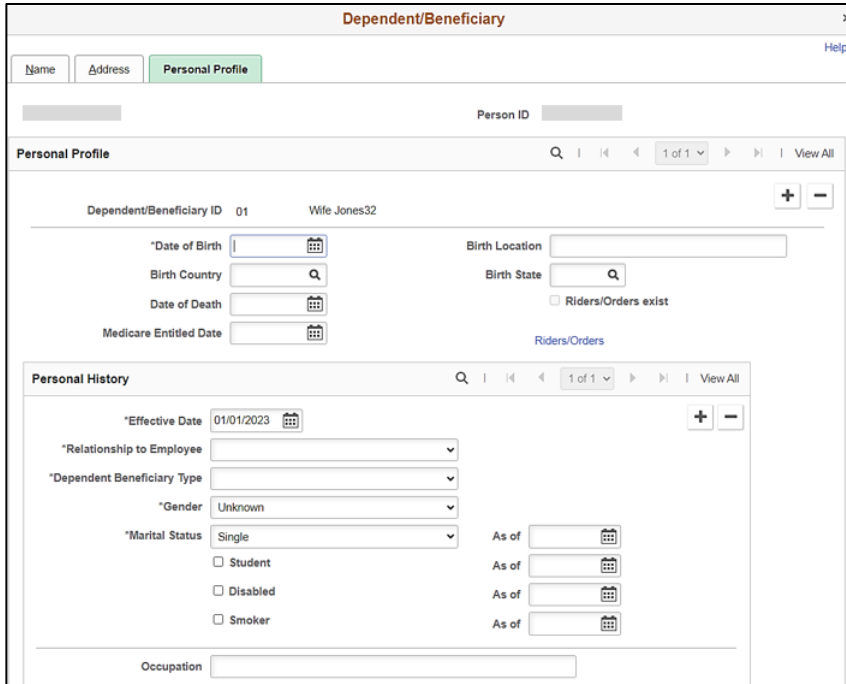




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Step	Action
	The Display Name field auto-populates with the name information previously entered.
31.	<p>Click the Address tab.</p> 
	<p>The Address tab displays.</p> 
32.	<p>Click the Same Address as Employee checkbox option (applicable for this scenario).</p> 
	<p>The address information can be completed as applicable for the dependent by either selecting the applicable Address Type using the dropdown button provided and then clicking the Edit Address button (the Edit Address page will display in a pop-up window, and the applicable address information can be entered).</p> 







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Step	Action
	<p>The Address tab refreshes.</p> 
	The address information auto-populates in the Employee's Current Address section.
33.	<p>Click the Personal Profile tab.</p> 

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Step	Action
	<p>The Personal Profile tab displays.</p> 
	<p>The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields.</p> <p>The Student and Smoker checkbox options are not required in Cardinal, and this information is not transmitted to the Plan Provider (Vendor).</p>
34.	<p>Click the Date of Birth Calendar icon and select the dependent's date of birth.</p> 
35.	<p>Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee ("Spouse" in this scenario).</p> 
36.	<p>Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent".</p> 

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Step	Action
	<p>“Approved Dependent” is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.</p>
37.	<p>Click the Gender dropdown button and select the dependent’s gender (“Unknown”, “Male”, or “Female”) (“Female” in this scenario).</p> 
38.	<p>The Marital Status field defaults to “Single”. Update as needed for the dependent (“Married” in this scenario).</p>  <p>If any status other than “Single” is selected, select the applicable date using the Marital Status as of Calendar icon (“12/16/2022” in this scenario).</p>
39.	Click the vertical scrollbar to scroll down on the page to the National ID section.
40.	<p>Enter the dependent’s Social Security Number (SSN) in the National ID field.</p> 
	<p>If the employee did not provide the dependent’s SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event.</p> <p>Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.</p>
41.	<p>Click the OK button.</p> 



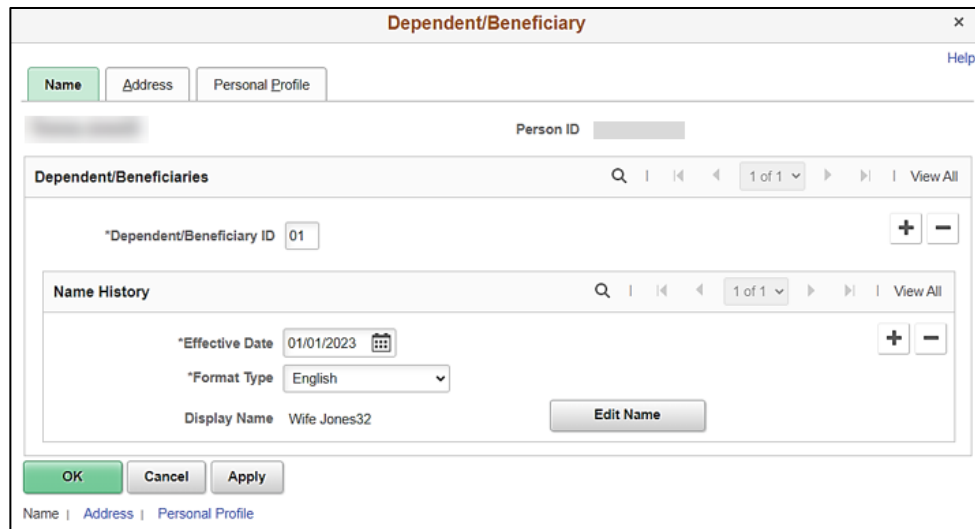
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Step	Action											
	<p>The Dependents / Beneficiaries tab redisplay.</p> <div><div><div>BenAdmin Data Entry</div><div><div>Event / Participant Selection</div><div>Option Election</div><div>Dependents / Beneficiaries</div></div><div><div>Schedule ID EM00</div><div>Employee ID</div><div>Event ID 2</div><div>Event Data 01/01/2023 Marriage</div><div>Benefit Record 0</div><div>Excess Credit Rollover To Forfeit Excess Credits</div></div><div><div>Dependent/Beneficiaries Currently on Record</div><table><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr><tr><td>Jones32,Wife</td><td>Spouse</td><td>Approved Dependent</td><td>05/05/1997</td></tr></table><div>Change/Add Dependent Data</div></div><div><div>Elections Requiring Supplemental Information</div><table><tr><td>10</td><td>Medical</td><td>Enroll Dependents</td></tr></table></div><div><div>OK</div><div>Cancel</div><div>Apply</div><div>Refresh</div></div><div>Event / Participant Selection Option Election Dependents / Beneficiaries</div></div></div>	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Jones32,Wife	Spouse	Approved Dependent	05/05/1997	10	Medical	Enroll Dependents
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth									
Jones32,Wife	Spouse	Approved Dependent	05/05/1997									
10	Medical	Enroll Dependents										
<div><div>i</div></div>	<p>The add dependent displays in the Dependent/Beneficiaries Currently on Record section. If additional dependents need to be added (e.g., birth of twins, adding stepchildren as a result of marriage, etc.), proceed with Step 42.</p> <p>If no additional dependents need to be added, skip to Step 44.</p>											
42.	<p>In this scenario, a stepchild will be added. Click the Change/Add Dependent Data link.</p> <div><div>Change/Add Dependent Data</div></div>											

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Step	Action
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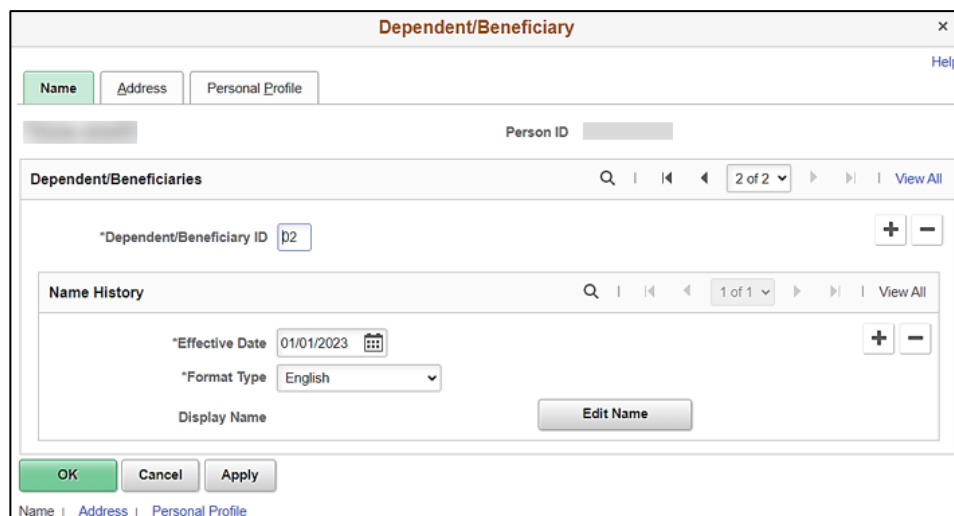
The **Name** tab redisplay.




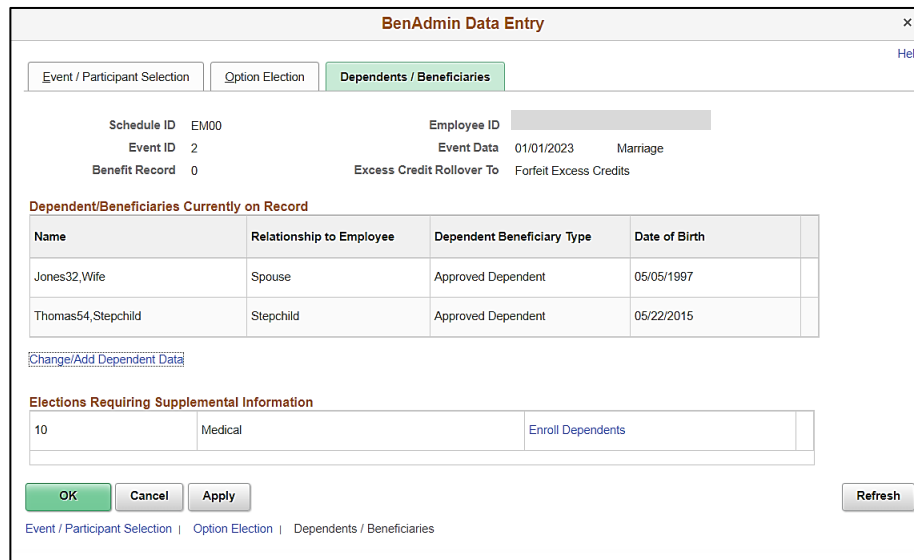

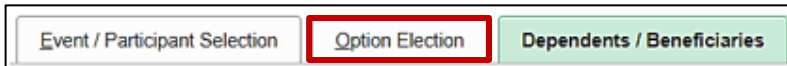
43. Click the **Add a New Row** icon (+) within the **Dependent/Beneficiaries** section.



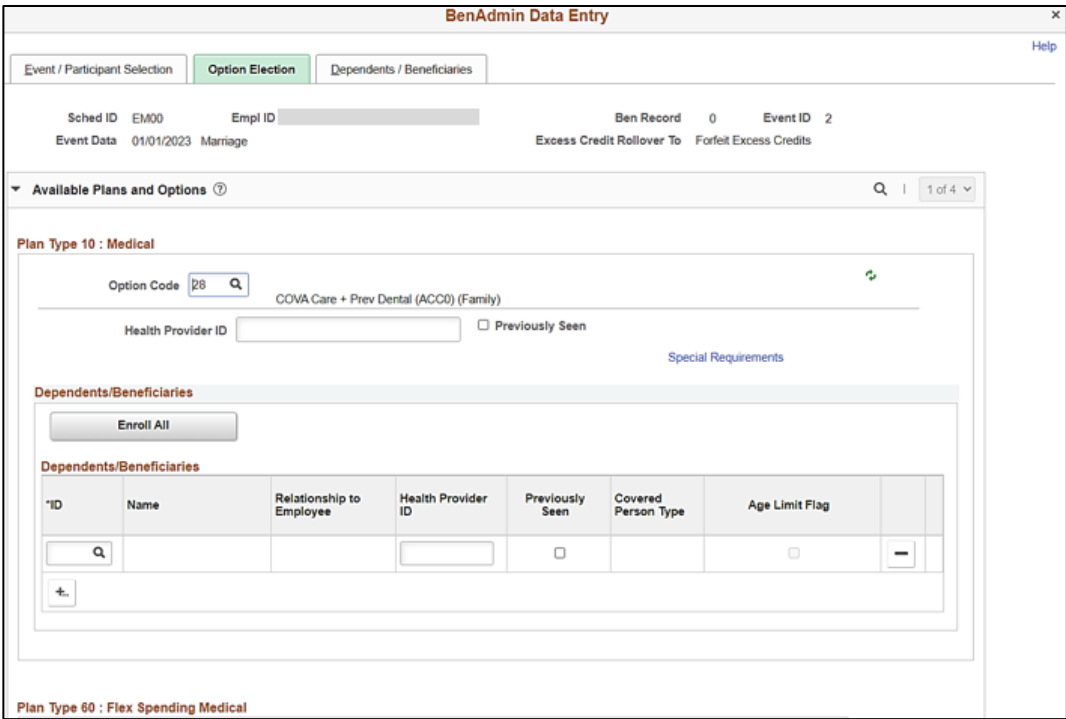
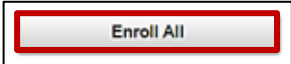

The page refreshes with a new row.



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Step	Action
	<p>The Dependent/Beneficiary ID field increments by “1” (“02” in this scenario as this is the second dependent being added). Dependent/Beneficiary IDs do not need to be sequential and should never be manually updated for existing records.</p> <p>Repeat Steps 23 - 36 to complete the data entry for the next dependent and then repeat Steps 23 – 38 as needed until all dependents have been added.</p>
<p>The Dependent/Beneficiaries tab displays after all dependents have been added.</p> <div data-bbox="358 630 1266 1186" data-label="Form">  </div>	
	<p>All dependents that have been added display in the Dependent/Beneficiaries Currently on Record section (spouse and a stepchild in this scenario).</p>
44.	<p>Click the Option Election tab.</p> <div data-bbox="254 1388 1036 1453" data-label="Form">  </div>

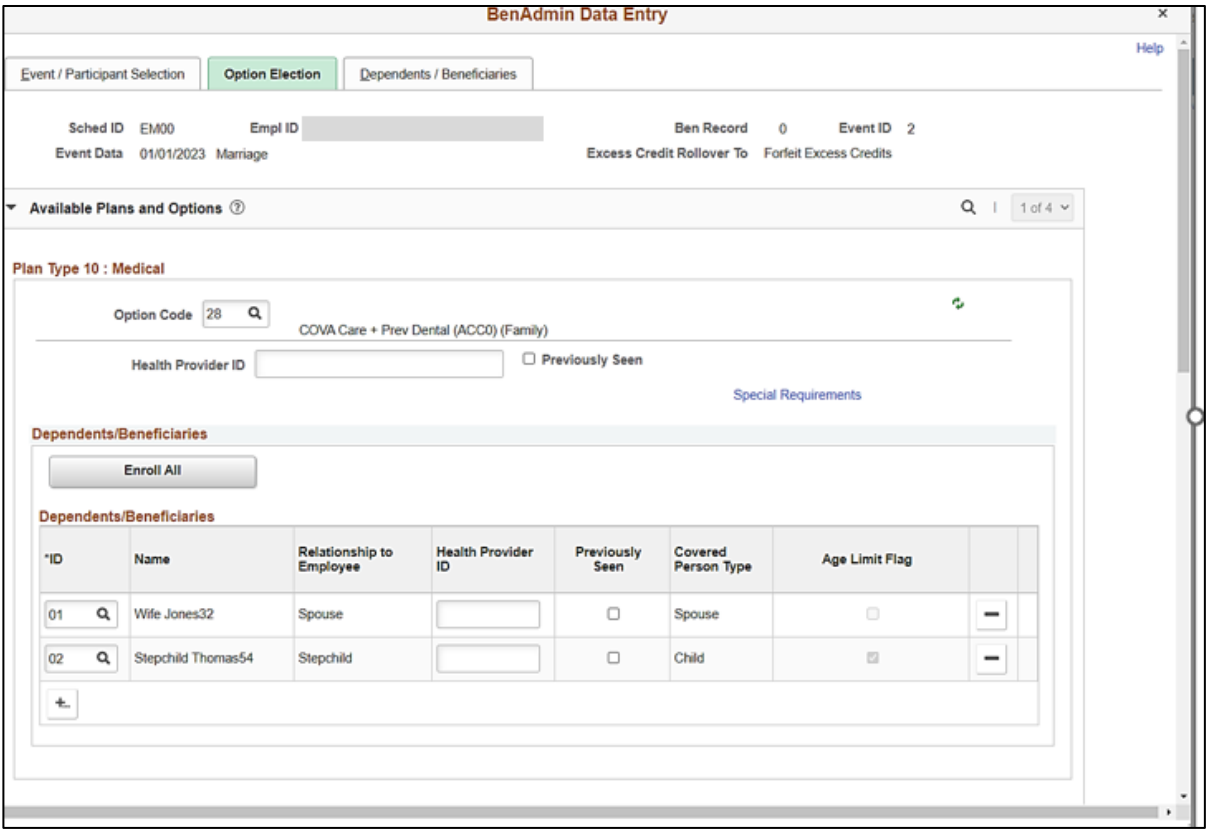

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Step	Action
	<p>The Option Election tab redisplay.</p> 
45.	<p>Next, enroll the dependent(s) in the previously selected Medical Plan by Clicking the Enroll All button if all dependents will be enrolled (applicable for this scenario).</p> 
	<p>User can also enroll the dependent(s) in the previously selected Medical Plan by adding the applicable dependents individually using the ID Look Up icon within the Dependents/Beneficiaries section.</p> <p>Additional rows can be added in this section by clicking the Add Multiple Rows icon (+...).</p>



Benefits Job Aid

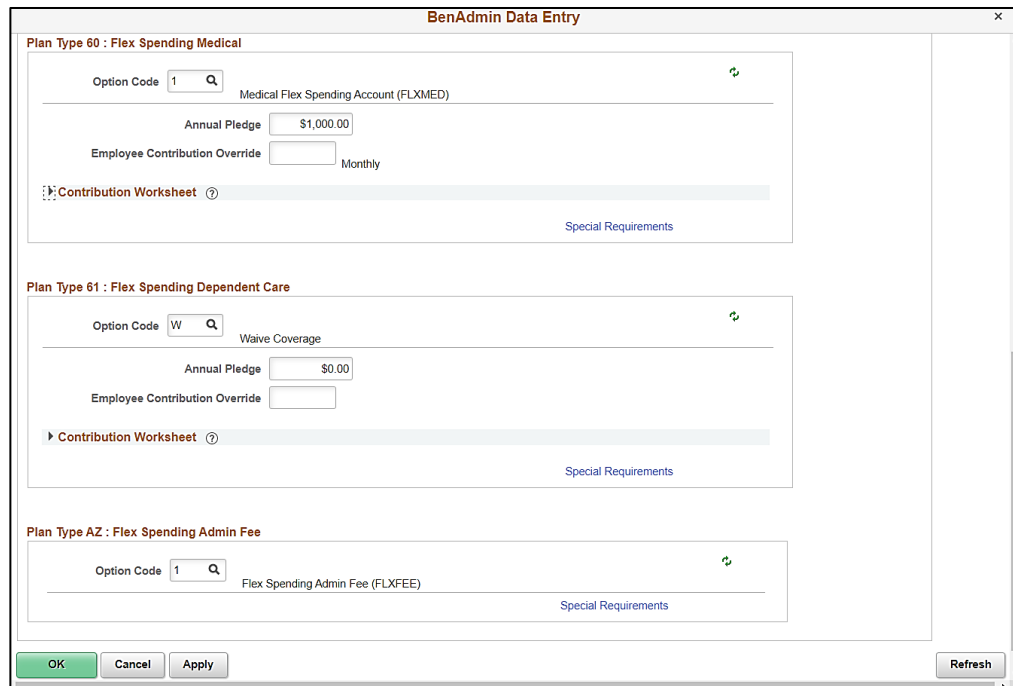
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Step	Action
	<p>The page refreshes.</p> 
	<p>The dependents enrolled display in the Dependents/Beneficiaries section. Validate for accuracy and ensure that all applicable dependents are listed.</p>
46.	<p>Click the vertical scrollbar to scroll down on the page.</p>

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Step	Action
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The **FSA Elections** section of the **Option Election** page.



The screenshot shows the 'BenAdmin Data Entry' window with three sections for FSA Elections:

- Plan Type 60 : Flex Spending Medical**: Option Code 1, Medical Flex Spending Account (FLXMED), Annual Pledge \$1,000.00, Employee Contribution Override (blank), Monthly. Includes links for Contribution Worksheet and Special Requirements.
- Plan Type 61 : Flex Spending Dependent Care**: Option Code W, Waive Coverage, Annual Pledge \$0.00, Employee Contribution Override (blank). Includes links for Contribution Worksheet and Special Requirements.
- Plan Type AZ : Flex Spending Admin Fee**: Option Code 1, Flex Spending Admin Fee (FLXFEE). Includes a link for Special Requirements.

Buttons at the bottom: OK, Cancel, Apply, and a Refresh button on the right.

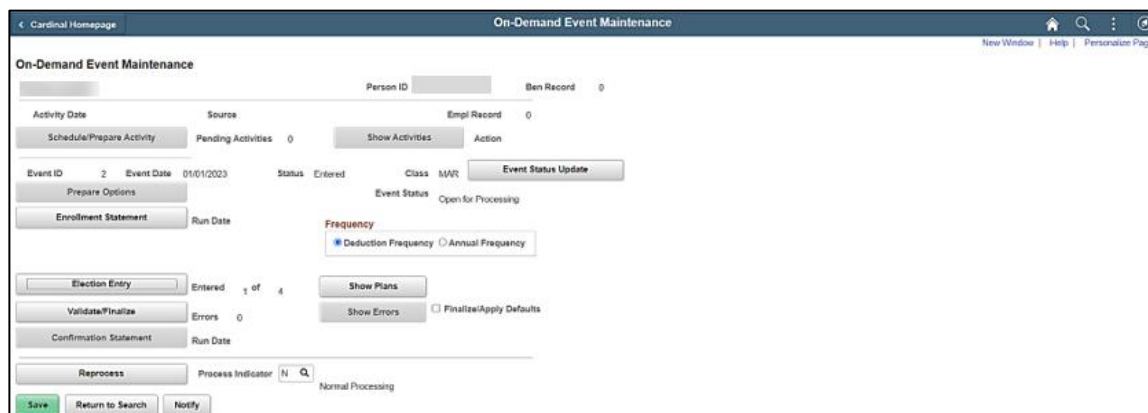
47. Review the employee's FSA elections and make updates as needed based on the information provided by the employee (in this example, the employee is not making any updates to their FSA elections).

48. Click the **OK** button at the bottom of the page once all elections have been made/updated.



The image shows a close-up of the buttons at the bottom of the window: OK (highlighted with a red border), Cancel, and Apply.






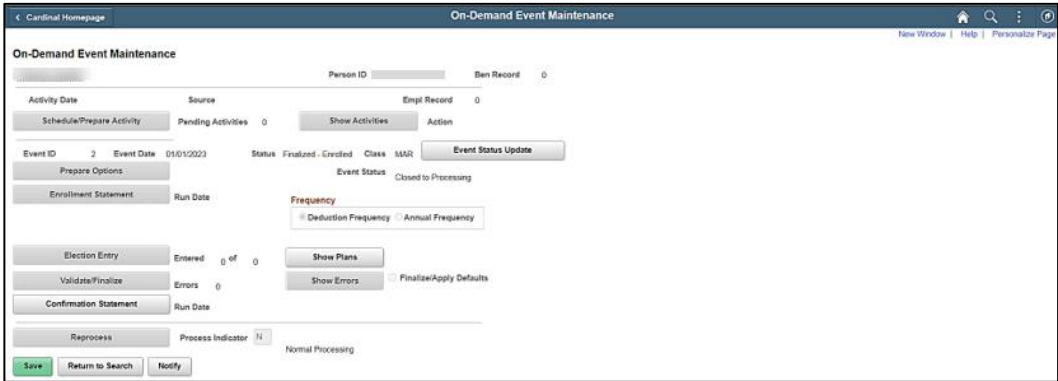

The **On-Demand Event Maintenance** page redispays.



The screenshot shows the 'On-Demand Event Maintenance' page with various fields and buttons:

- Person ID, Ben Record, and Empl Record fields.
- Activity Date, Source, and Pending Activities (0) section.
- Event ID 2, Event Date 01/01/2023, Status Entered, Class MAR, and Event Status Open for Processing.
- Frequency section with Deduction Frequency selected and Annual Frequency unselected.
- Buttons: Schedule/Prepare Activity, Show Activities, Action, Event Status Update, Prepare Options, Enrollment Statement, Run Date, Election Entry, Validate/Finalize, Errors 0, Confirmation Statement, Reprocess, Process Indicator N, Normal Processing, Save, Return to Search, and Notify.

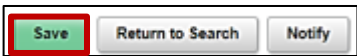

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.
49.	Click the Validate/Finalize button. 
	This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.
A Confirmation message displays in a pop-up window once the process completes. <div data-bbox="506 781 1128 1003"> <p>Process completed successfully. (3000,530)</p>  </div>	
50.	Click the OK button to close the message. <div data-bbox="256 1087 876 1310"> <p>Process completed successfully. (3000,530)</p>  </div>
The On-Demand Event Maintenance page redispays. 	
	The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
51.	<p>Click the Save button.</p>  A screenshot of a web interface showing three buttons: "Save", "Return to Search", and "Notify". The "Save" button is highlighted with a red rectangular border.
	<p>This process is now complete. Refer to the Viewing the Employee's Benefit Information section of this Job Aid for instructions on how to validate accuracy.</p> <p>Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee.</p>



BN361 Creating and Completing a Life Event on Behalf of an Employee

Removing Dependent(s)

This section of the Job Aid should be referenced when creating and processing a Life Event on behalf of the employee wherein one or more dependents is being removed from the employee's coverage (divorce, death, etc.). The steps included in this section of the Job Aid are based on the following example scenario.

Scenario: An employee got divorced on 6/21/2024. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 6/21/2024 to remove their ex-spouse from enrollment in their Health Plan. The children from the marriage are going to remain enrolled in the employee's Health Plan. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being removed from the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

Step	Action
1.	Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Find an Existing Value** page displays.

← Cardinal Homepage

Benefit Event Entry

Benefit Event Entry

Find an Existing Value

▼ Search Criteria

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

🕒 Recent Searches

Choose from recent searches

✎

🔖 Saved Searches

Choose from saved searches

✎

Empl ID

begins with

Benefit Record Number

=

Empl Record

=

First Name

begins with

Last Name

begins with

Business Unit

begins with

Department

begins with

^ Show fewer options

☐ Case Sensitive

☐ Include History

☐ Correct History


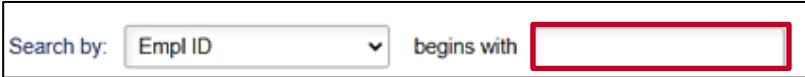

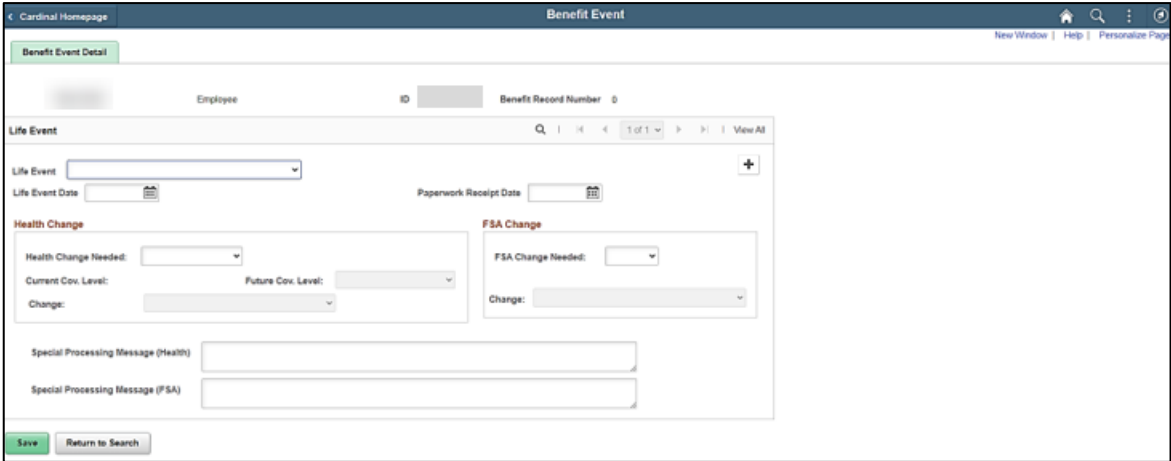

Search

Clear



Benefits Job Aid

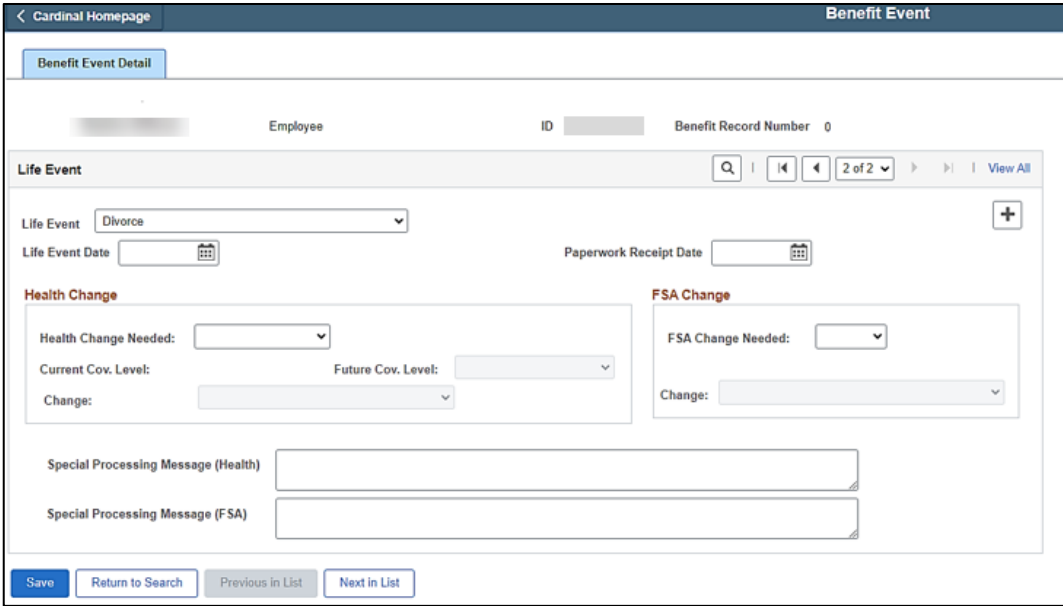




BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Page . This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	<p>Enter the employee's Employee ID in the Search by field.</p> <p>The other search by options available (Search by dropdown button) are Business Unit, Department, and Name.</p> 
3.	<p>Click the Search button.</p> 
<p>The Benefit Event page displays for the applicable employee.</p> 	
4.	<p>Click the Life Event dropdown button and select the applicable type of Life Event by clicking the corresponding list item ("Divorce" in this scenario).</p> 

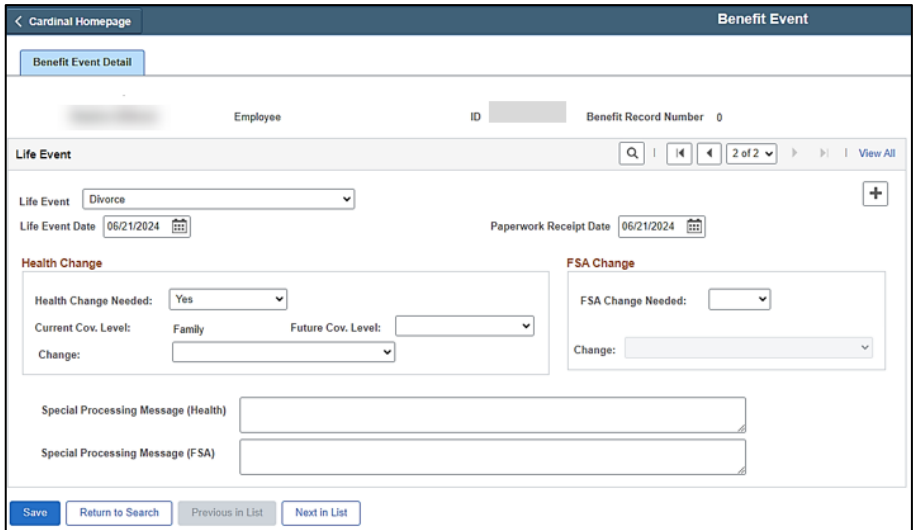



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Benefit Event page redisplay with the selected Life Event.</p> 
5.	<p>Click the Life Event Date Calendar icon and select the applicable date (“6/21/2024” in this scenario).</p> 
	<p>This is the date of the actual event (marriage, birth, divorce, etc.).</p>
6.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date (“6/21/2024” in this scenario).</p> 
	<p>This is the date that the Benefits Enrollment form was received from the employee.</p>



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
7.	<p>Click the Health Change Needed dropdown button and select the applicable answer based on the following:</p> <ul style="list-style-type: none"> If the Life Event does require a change in the Health Plan Coverage Code for the employee, select “Yes” (e.g., this is a divorce event, and the employee will still cover two children dependents (no change from “Family” coverage)) Even if the Life Event does not require a change in the Health Plan Coverage Code, but it will require changes to the covered dependent(s), select “Yes”. If “Yes” is not selected, a Benefit Event will not be created <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Health Change Needed: ▼ </div>
<p>The Benefit Event page refreshes.</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;">  </div>	
	<p>The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.</p>
8.	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Future Cov. Level: ▼ </div>

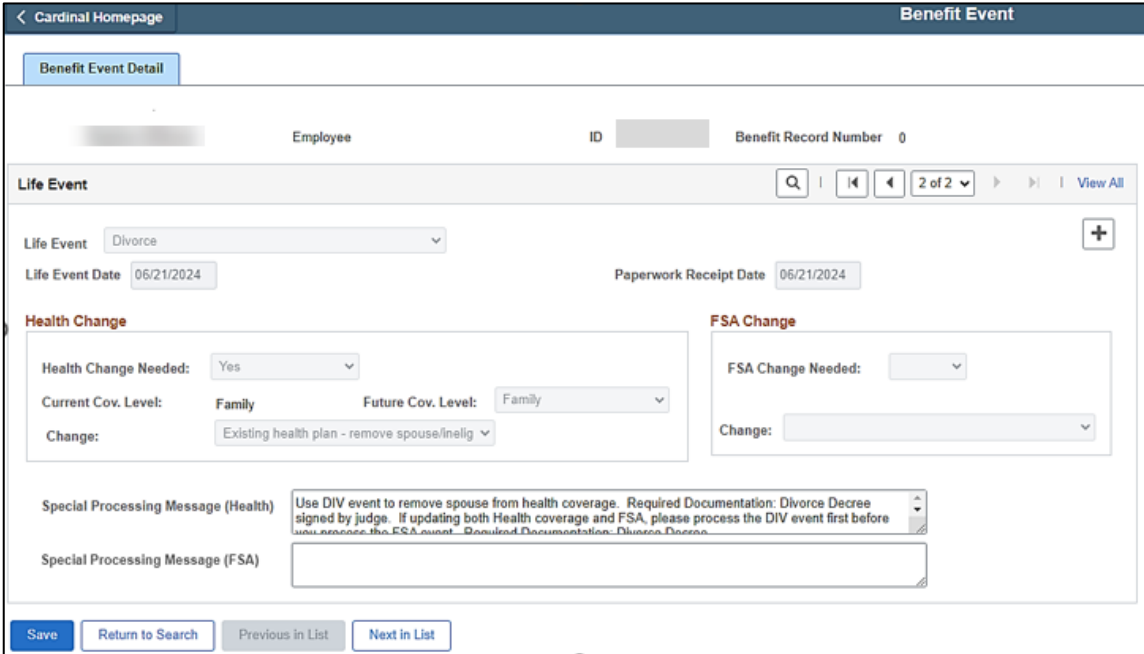


Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The coverage levels available for selection are:</p> <ul style="list-style-type: none">• “Single, Employee”• “Employee + Spouse”• “Employee + CH (Child)”• “Family” <p>Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed.</p>
9.	<p>Click the Change dropdown button and select the applicable list item (“Existing health plan – remove spouse/ineligible dependents” in this scenario).</p> <div><div>Change:</div><div></div></div>
	<p>The selections available will vary based on the type of Life Event previously selected.</p>

Completed **Benefit Event Entry** page.



< Cardinal Homepage **Benefit Event**

Benefit Event Detail

Employee ID Benefit Record Number 0

Life Event Q | < > 2 of 2 | View All

Life Event Divorce +

Life Event Date 06/21/2024 Paperwork Receipt Date 06/21/2024

Health Change

Health Change Needed: Yes

Current Cov. Level: Family Future Cov. Level: Family

Change: Existing health plan - remove spouse/inelig

FSA Change

FSA Change Needed:

Change:

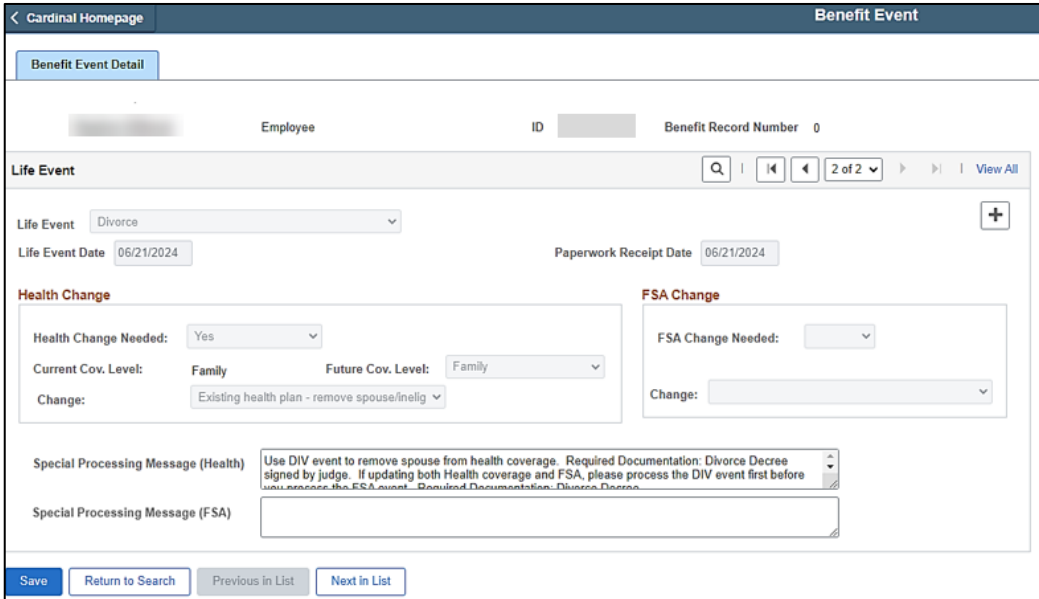

Special Processing Message (Health) Use DIV event to remove spouse from health coverage. Required Documentation: Divorce Decree signed by judge. If updating both Health coverage and FSA, please process the DIV event first before processing the FSA event. Required Documentation: Divorce Decree.

Special Processing Message (FSA)

Save Return to Search Previous in List Next in List

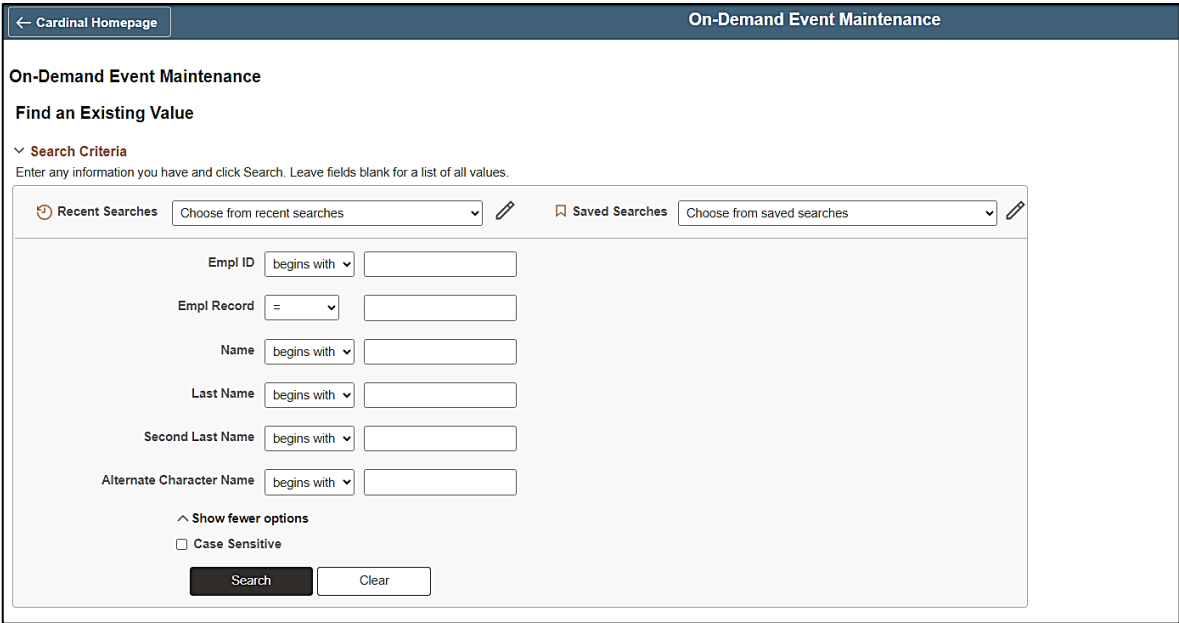



10.	<p>Click the Save button.</p> <div><div>Save</div><div>Return to Search</div><div>Previous in List</div><div>Next in List</div></div>
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BN361 Creating and Completing a Life Event on Behalf of an Employee

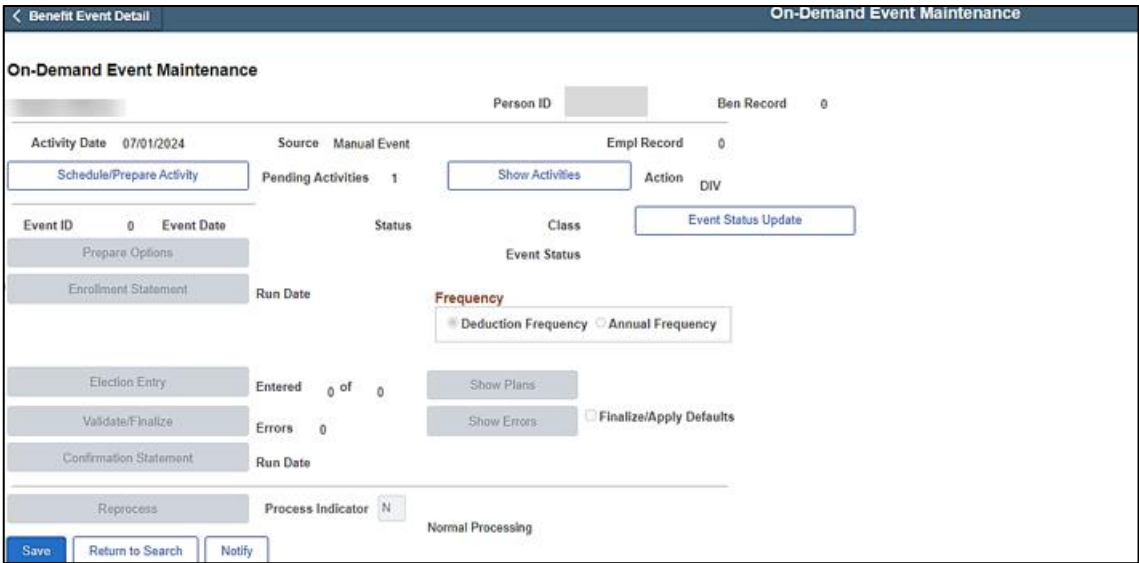

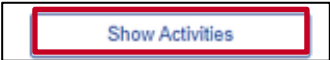
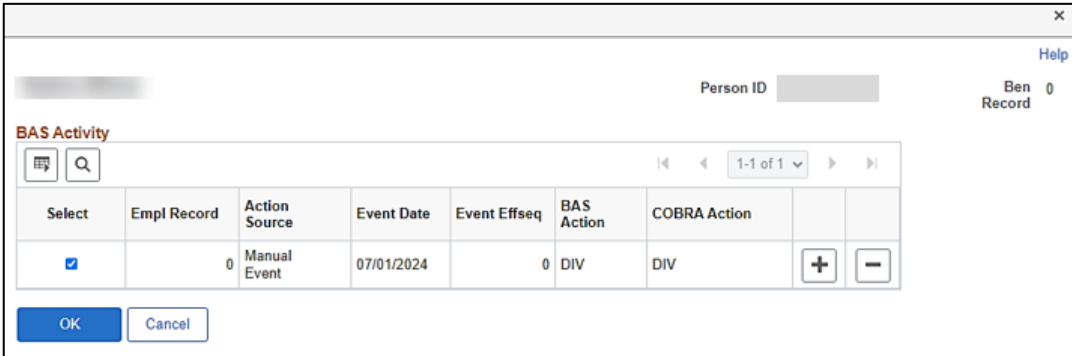
Step	Action
	<p>The page refreshes once the save is complete.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions.</p> <p>Note: If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
11.	<p>Navigate to the On-Demand Event Maintenance page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>



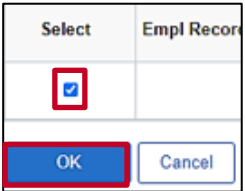
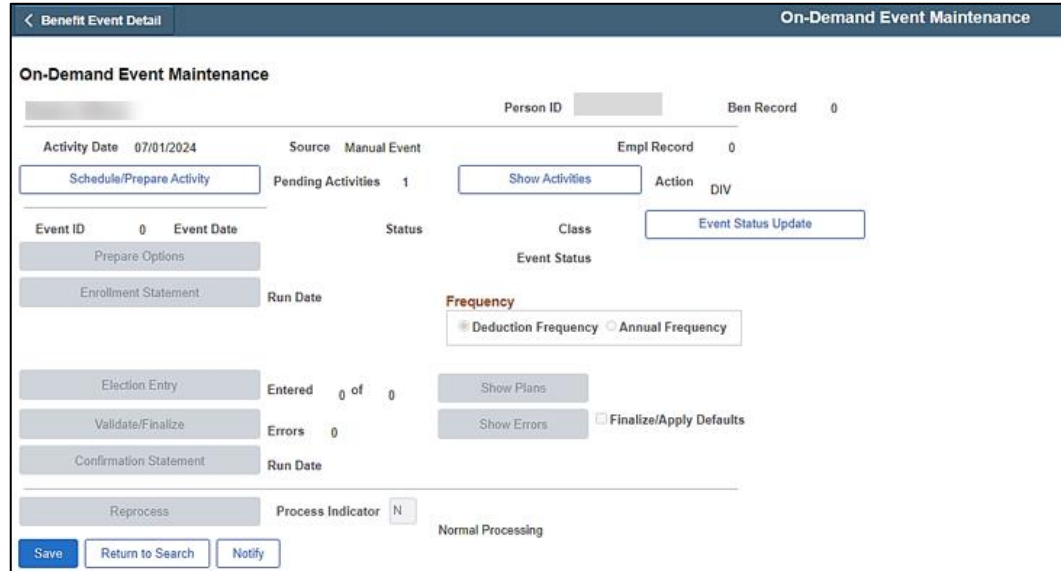

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> <div></div>
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
12.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> <div></div>
13.	<p>Click the Search button.</p> <div></div>

BN361 Creating and Completing a Life Event on Behalf of an Employee

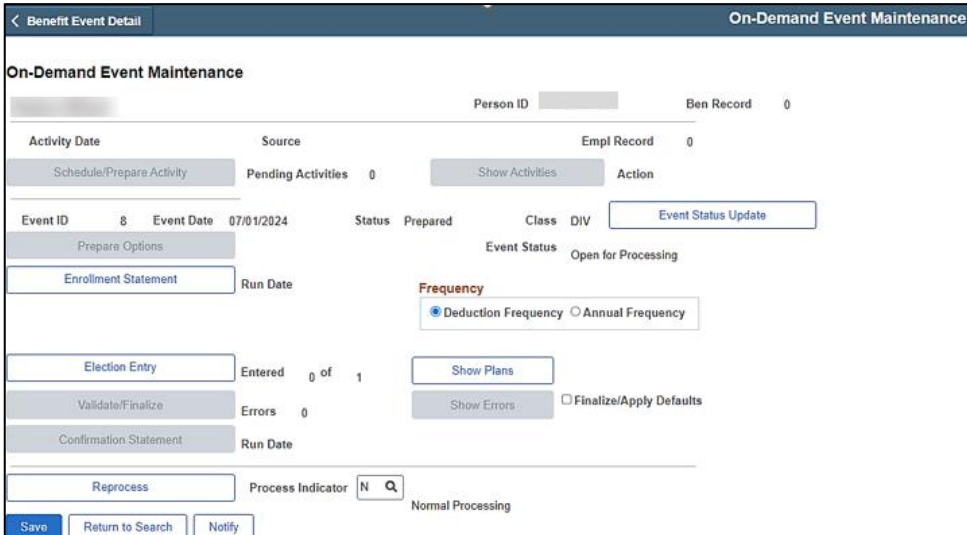
Step	Action
	<p>The On-Demand Event Maintenance page displays for the applicable employee.</p> 
	<p>Review the Activity Date field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a divorce, so the Activity Date field defaults to the first day of the following month). Ensure that this date is accurate.</p> <p>The Source field will be “Manual Event”. The Action field will default based on the type of Life Event (“DIV” for Divorce in this scenario).</p>
14.	<p>Click the Show Activities button.</p> 
	<p>The BAS Activity page displays in a pop-up window.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
15.	<p>Ensure that the Select checkbox option for the Manual Benefit Event is selected and then click the OK button.</p> 
<p>The On-Demand Event Maintenance page redisplay.</p> 	
16.	<p>If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a "0". In this case, proceed to Step 19.</p> <p>If the Pending Activities field displays a "1", click the Schedule/Prepare Activity button.</p> <p>Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity.</p> 

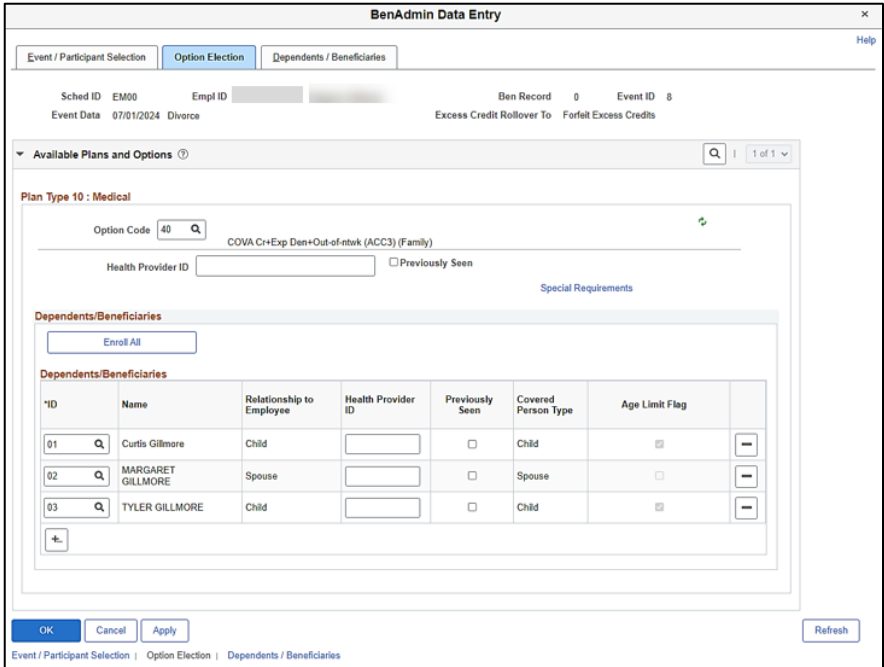



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <div><p>Process completed successfully. (3000,530)</p><p>OK</p></div>
17.	<p>Click the OK button.</p> <div><p>OK</p></div>
	<p>The On-Demand Event Maintenance page redisplay.</p> <div></div>
18	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p> <div><p>Status Prepared Class DIV Event</p><p>Event Status Open for Processing</p></div> <p>If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.</p>
19.	<p>Click the Election Entry button.</p> <div><p>Election Entry</p></div>


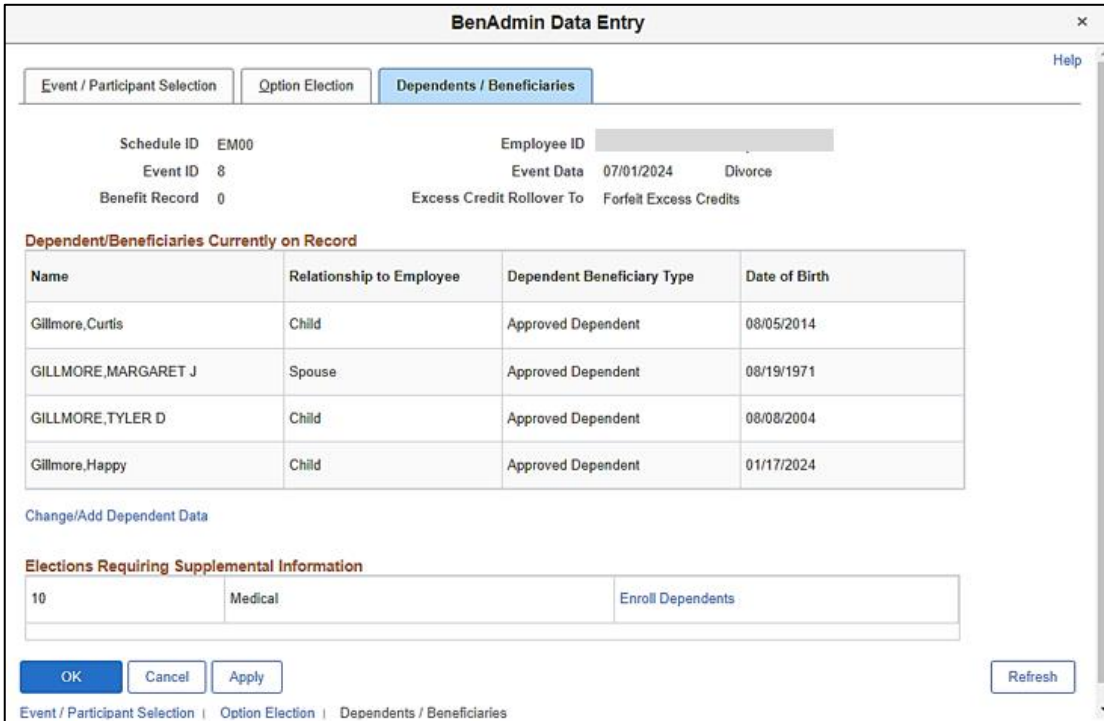



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Election Entry page displays in a pop-up window with the Option Election tab displayed by default.</p> 
20.	<p>Select the applicable Medical Plan based on the employee's Benefits Enrollment form as needed by clicking the Option Code Look Up icon (magnifying glass) within the Plan Type 10: Medical section and then selecting the applicable Medical Plan/Coverage Code (in this scenario, the employee has three children dependents that are not being removed and therefore, the Medical Plan coverage code does need to be updated).</p> <p>The Coverage Codes are as follows:</p> <ul style="list-style-type: none">• 1 – Single• 2 – Employee + Spouse• 3 – Employee + Child (except for Tricare),• 4 – Employee + 2 or More Dependents (Family – except for Tricare)• 8 – Employee + Child(ren) (Tricare only)• 9 – Family (EE + SP + Child/ren for Tricare only) 



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
21.	<p>Click the Dependents / Beneficiaries tab to update the applicable dependent being removed from coverage.</p>  <p>The Dependents / Beneficiaries tab displays.</p> 
22.	<p>Click the Change/Add Dependent Data link.</p> 



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **Dependent/Beneficiary** page displays with the **Name** tab displayed by default.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Name' tab selected. The form includes a 'Person ID' field, a 'Dependent/Beneficiaries' list with a search bar and navigation controls (1 of 4), and a 'Name History' section. The 'Name History' section shows a record for 'Curtis Gillmore' with an effective date of 01/01/1901 and a format type of English. There are buttons for 'Edit Name', 'OK', 'Cancel', and 'Apply' at the bottom.




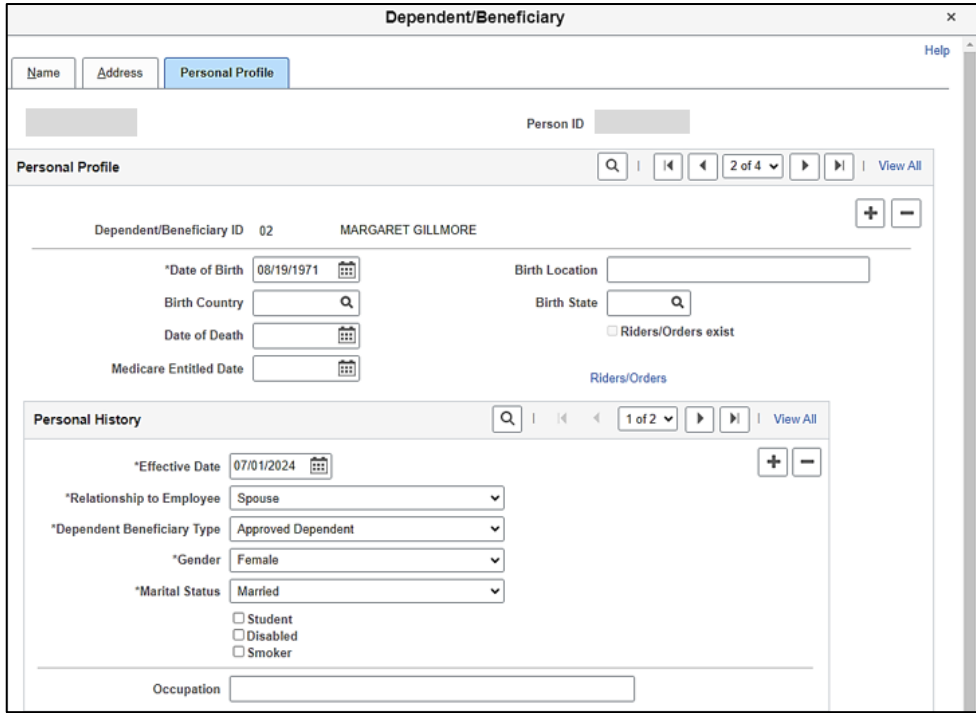

23. Click the **Personal Profile** tab to locate the dependent being removed.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Personal Profile' tab selected. The 'Personal Profile' section is highlighted with a red border. It includes fields for 'Dependent/Beneficiary ID' (02), 'MARGARET GILLMORE', 'Date of Birth' (08/19/1971), 'Birth Location', 'Birth Country', 'Birth State', 'Date of Death', 'Medicare Entitled Date', and 'Riders/Orders exist'.


The **Personal Profile** tab displays.

The screenshot shows the 'Dependent/Beneficiary' form with the 'Personal Profile' tab selected. The 'Personal Profile' section is highlighted with a red border. It includes fields for 'Dependent/Beneficiary ID' (02), 'MARGARET GILLMORE', 'Date of Birth' (08/19/1971), 'Birth Location', 'Birth Country', 'Birth State', 'Date of Death', 'Medicare Entitled Date', and 'Riders/Orders exist'. The 'Personal History' section shows a record for 'Curtis Gillmore' with an effective date of 01/01/1901 and a format type of English. There are buttons for 'Edit Name', 'OK', 'Cancel', and 'Apply' at the bottom.

BN361 Creating and Completing a Life Event on Behalf of an Employee

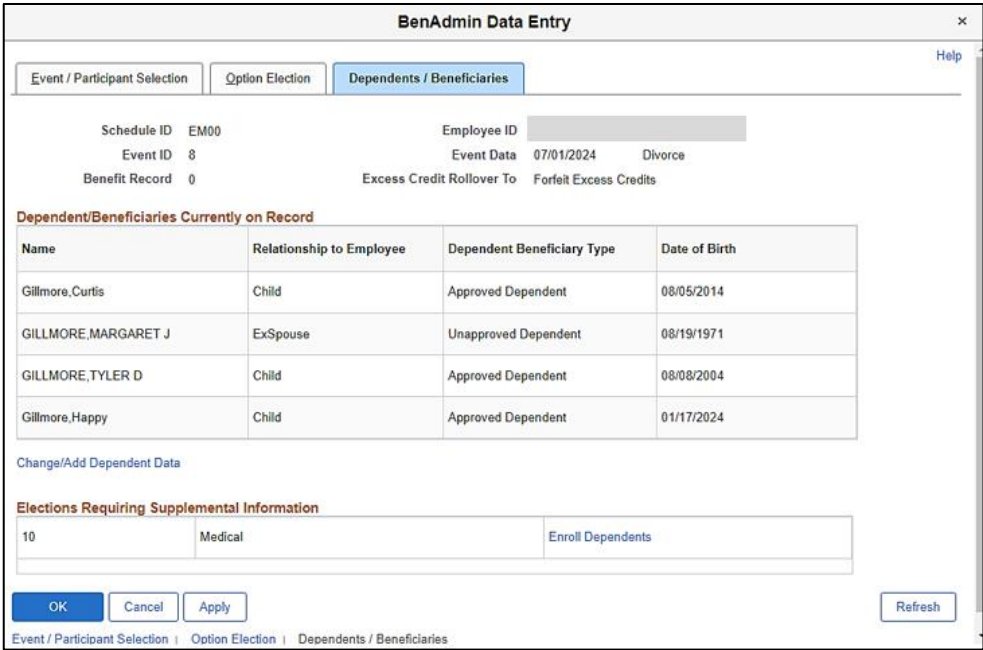


Step	Action
	<p>When removing dependents from coverage due to a Life Event, do not remove the dependent from Cardinal entirely as this will remove important audit history information from the system.</p> <p>The Delete icon (-) would delete the dependent from Cardinal. <u>Do not use this icon</u>. Complete the following steps to correctly remove the no longer eligible dependent from coverage.</p> 
24.	<p>Click the Add a Row icon (+) within the Personal History section.</p> 
<p>The page refreshes with a new row.</p> 	
	<p>The Effective Date field defaults to the date on which coverage for the dependent will be stopped based on the Life Event being processed (first day of the following month in this scenario due to a Divorce event being processed).</p>

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
25.	<p>Click the Relationship to Employee dropdown button and select the applicable list item (“ExSpouse” in this scenario).</p> <div> <div>*Relationship to Employee</div> <div>Spouse</div> </div>
<p>The page refreshes based on the relationship to employee selection.</p> <div> <div>Dependent/Beneficiary</div> <div> <div>Name</div> <div>Address</div> <div>Personal Profile</div> </div> <div> <div>Person ID</div> <div>02</div> </div> <div> <div>Personal Profile</div> <div> <div>Dependent/Beneficiary ID</div> <div>02</div> </div> <div> <div>MARGARET GILLMORE</div> <div> <div>*Date of Birth</div> <div>08/19/1971</div> </div> <div> <div>Birth Country</div> <div></div> </div> <div> <div>Date of Death</div> <div></div> </div> <div> <div>Medicare Entitled Date</div> <div></div> </div> <div> <div>Birth Location</div> <div></div> </div> <div> <div>Birth State</div> <div></div> </div> <div> <div>Riders/Orders exist</div> <div></div> </div> <div> <div>Riders/Orders</div> <div></div> </div> </div> <div> <div>Personal History</div> <div> <div>*Effective Date</div> <div>07/01/2024</div> </div> <div> <div>*Relationship to Employee</div> <div>ExSpouse</div> </div> <div> <div>*Dependent Beneficiary Type</div> <div>Unapproved Dependent</div> </div> <div> <div>*Gender</div> <div>Female</div> </div> <div> <div>*Marital Status</div> <div>Married</div> </div> <div> <div>Student</div> <div></div> </div> <div> <div>Disabled</div> <div></div> </div> <div> <div>Smoker</div> <div></div> </div> <div> <div>Occupation</div> <div></div> </div> </div> </div> </div>	
	<p>The Dependent Beneficiary Type field updates to “Unapproved Dependent” based on the relationship to employee selection.</p> <div> <div>*Dependent Beneficiary Type</div> <div>Unapproved Dependent</div> </div>
26.	<p>Click the Marital Status dropdown button and select the applicable list item (“Divorced” in this scenario).</p> <div> <div>*Marital Status</div> <div>Married</div> </div>
27.	<p>Scroll down to the bottom of the page as needed and click the OK button.</p> <div> <div>OK</div> </div>

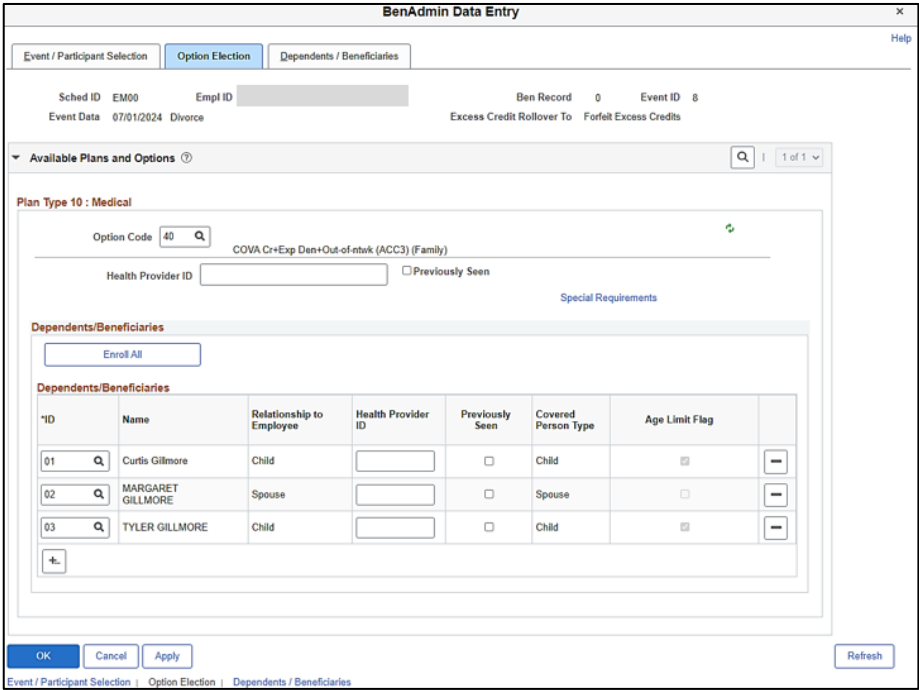

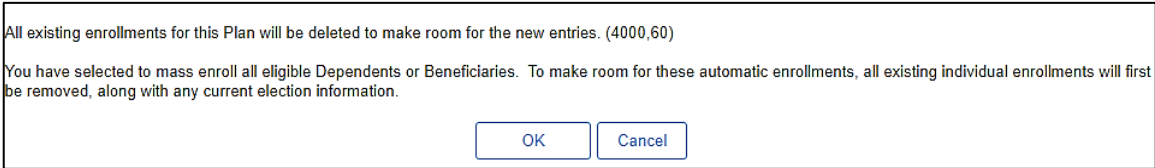



BN361 Creating and Completing a Life Event on Behalf of an Employee

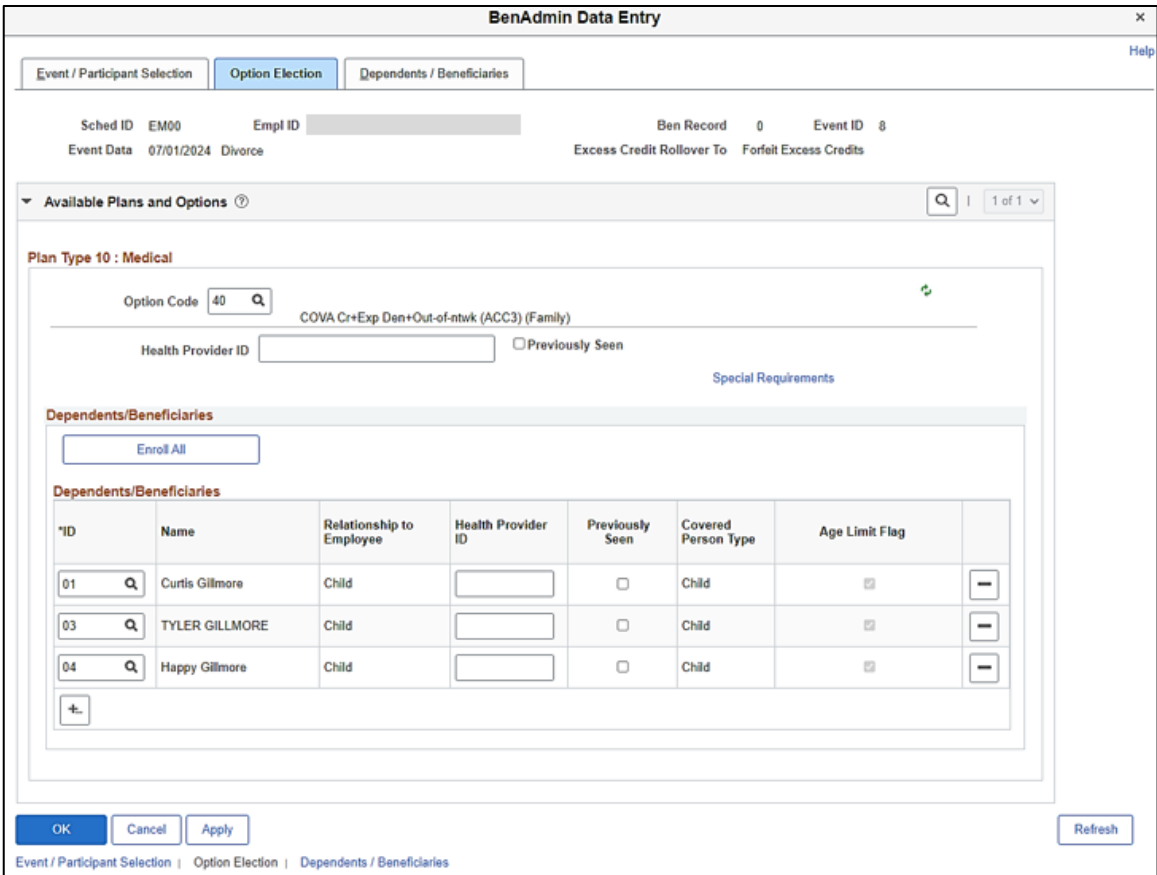


Step	Action
	<p>The BenAdmin Data Entry page redispays.</p> <div></div>
	The applicable dependent is updated to an unapproved dependent in the Dependent/Beneficiaries Currently on Record table.
28.	<p>Click the Option Election tab to update the enrolled dependents.</p> <div></div>



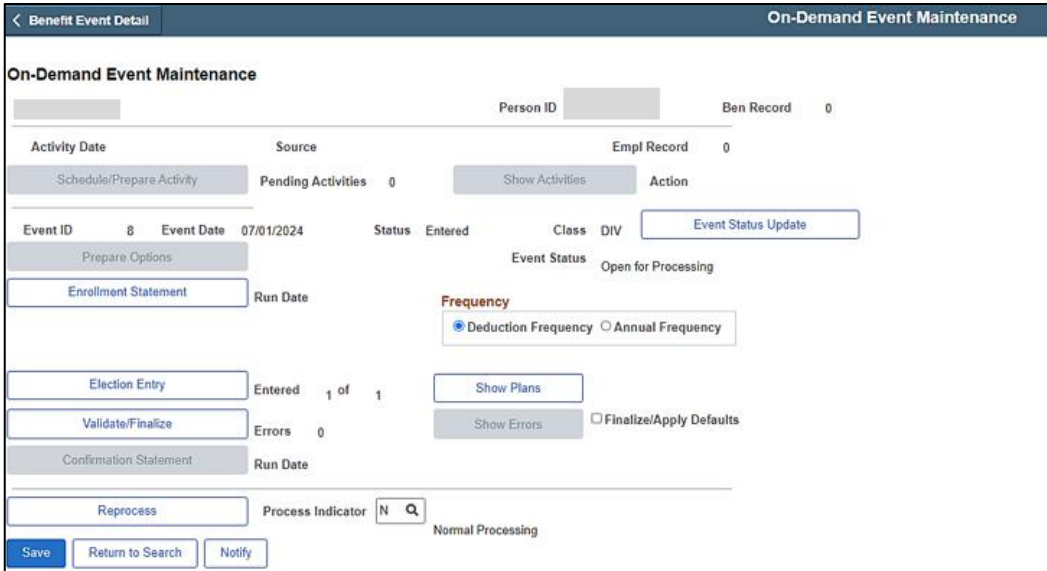

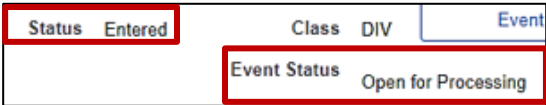



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Option Election tab redispays.</p> <div></div>
29.	<p>Click the Enroll All button.</p> <div></div>
	<p>A message displays in a pop-up window indicating that all dependents will be removed in order to re-enroll the eligible dependents. This is an expected message and not an error.</p> <div></div>
30.	<p>Click the OK button to close the message.</p> <div></div>


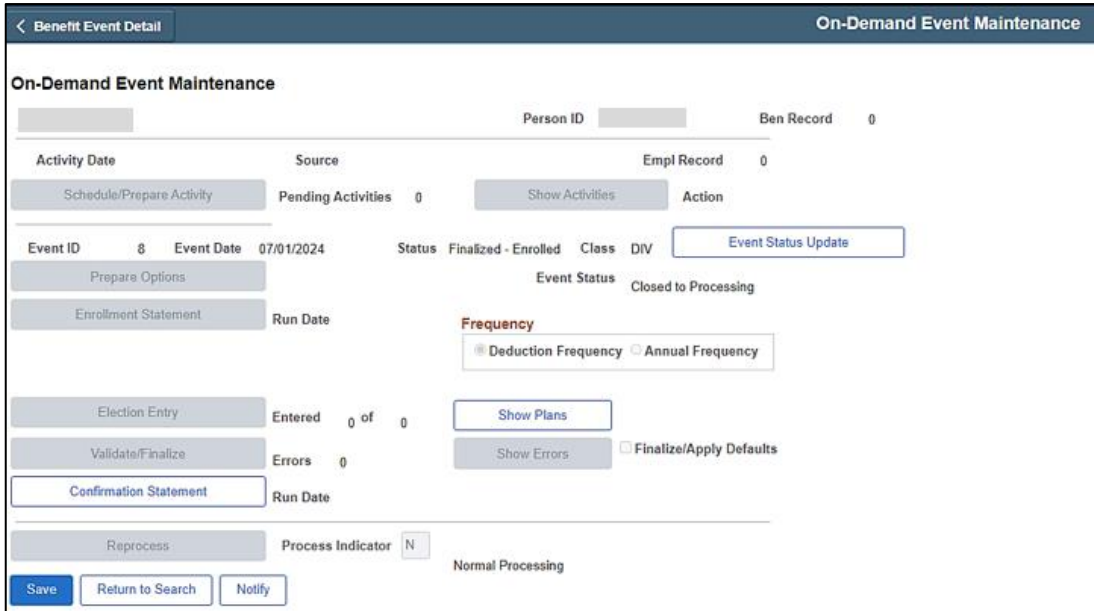

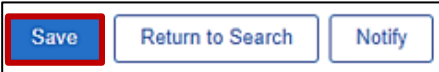

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Option Election tab redisplay.</p> 
	<p>The removed dependent no longer displays in the Dependents/Beneficiaries section.</p>
31.	<p>Click the OK button at the bottom of the page once all elections have been made/updated..</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.</p> 
32.	<p>Click the Validate/Finalize button.</p> 
	<p>This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.</p>
	<p>A Confirmation message displays in a pop-up window once the process completes.</p> 

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Step	Action
33.	<p>Click the OK button.</p> 
<p>The On-Demand Event Maintenance page redisplay.</p> 	
	<p>The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.</p>
34.	<p>Click the Save button.</p> 
	<p>This process is now complete. Refer to the Viewing the Employee's Benefit Information section of this Job Aid for instructions on how to validate accuracy.</p> <p>Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee.</p>

BN361 Creating and Completing a Life Event on Behalf of an Employee**Creating a Birth Event on Behalf of an Employee (with a tag along dependent)**

This section of the Job Aid should be referenced when creating and processing a Birth Event on behalf of the employee wherein one or more tag along dependents will also be added to the employee's coverage. The steps included in this section of the Job Aid are based on the following example scenario.

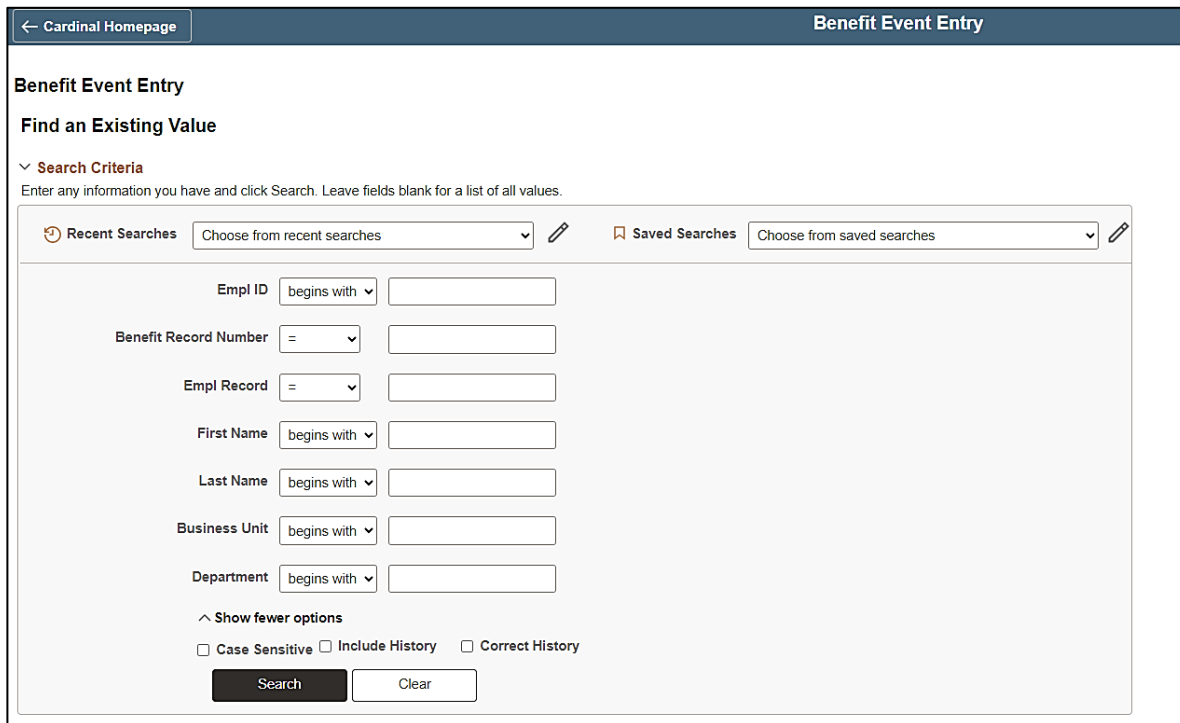
Scenario: An employee had a child born on 6/21/2024. This employee is currently enrolled in a "Single" coverage code Health Plan. The employee submitted the appropriate supporting documentation for the birth and a benefits enrollment request form on 6/24/2024 to add their new child as a dependent and enroll them in their benefits. Additionally, the employee now wants to add their spouse to their coverage as a tag along dependent (eligible based on the qualifying birth event). Finally, the employee also now wants to enroll in the Flex Spending Dependent Care plan. The employee did not initiate this Qualifying Mid-Year Birth Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process multiple Benefit Events for this employee based on the following guidelines:


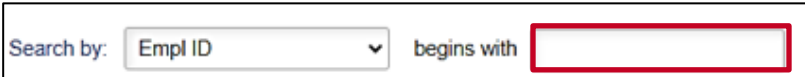


- Separate Benefit Events must be created for each of these enrollment changes as they will have different coverage begin dates
- The Health Plan coverage begin date for the newborn child will be immediate on the child's date of birth (6/21/2024 in this scenario)
- The Health Plan coverage begin date for the employee's spouse will be the first of the month in which the paperwork was received (6/1/2024 in this scenario)
- The enrollment in the Flex Spending Dependent Care plan will be effective as of the first of the month following the employee's enrollment (7/1/2024 in this scenario)
- These Benefit Events must be processed in the correct order (based on the coverage begin and effective dates). Specifically in this scenario, the tag along dependent must be enrolled first because that Benefit Event has the earliest coverage begin date. Subsequently, the newborn child can be enrolled next (separate Benefit Event being processed), and finally, the Flex Spending Dependent Care Plan Benefit Event can be processed
- After the Benefit Event is processed to add the tag along dependent, the dependent's enrollment will be transmitted to the Health Vendor in the evening interface file. This must be completed before the Benefit Event to add the newborn child is processed. Therefore, the first Benefit Event to add the tag along dependent must be processed on one day (enrollment transmitted to the Health Vendor on that evening's interface file) and the Benefit Event to add the newborn child can be processed the next day (enrollment transmitted to the Health Vendor on that evening's interface file). These Benefit Events must be processed one day apart so that the Health Vendor is notified as of each effective date

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
1.	Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

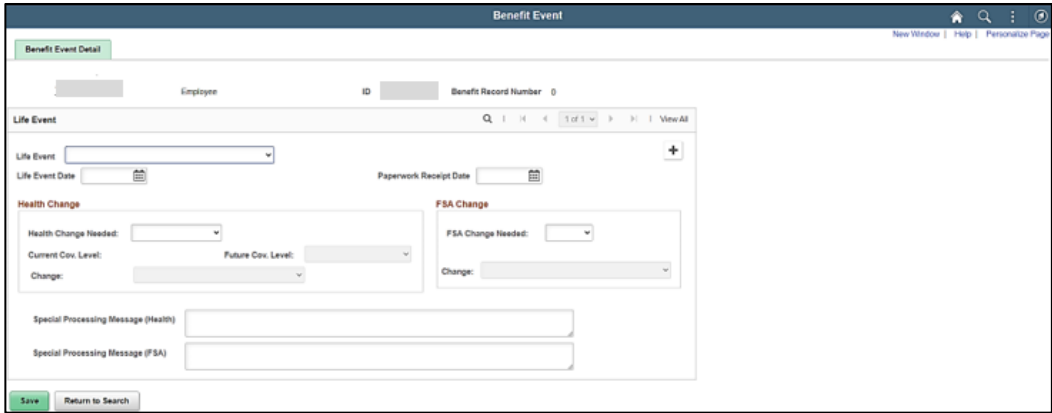


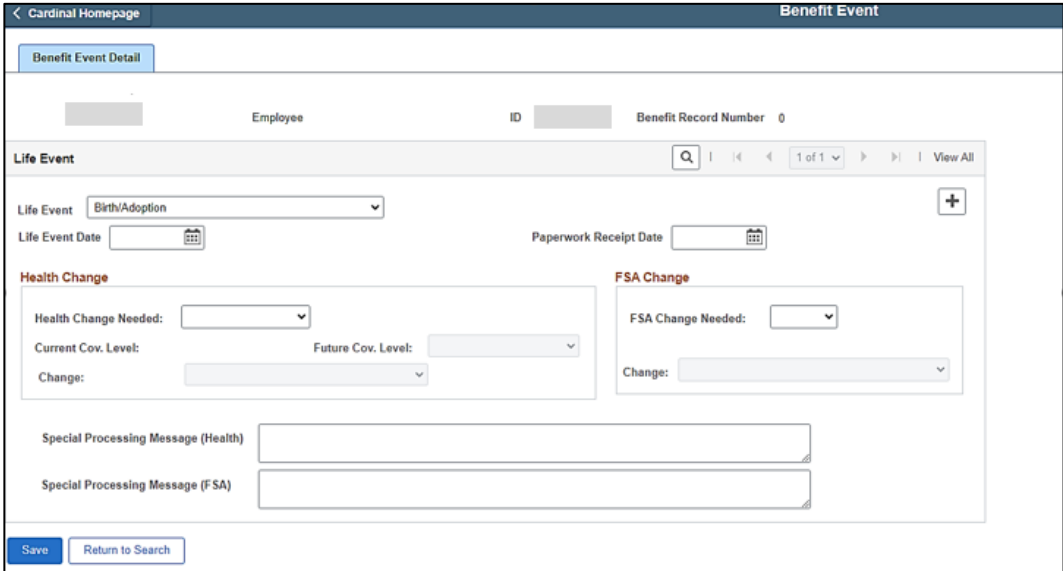
The **Benefit Event Entry Find an Existing Value** page displays.







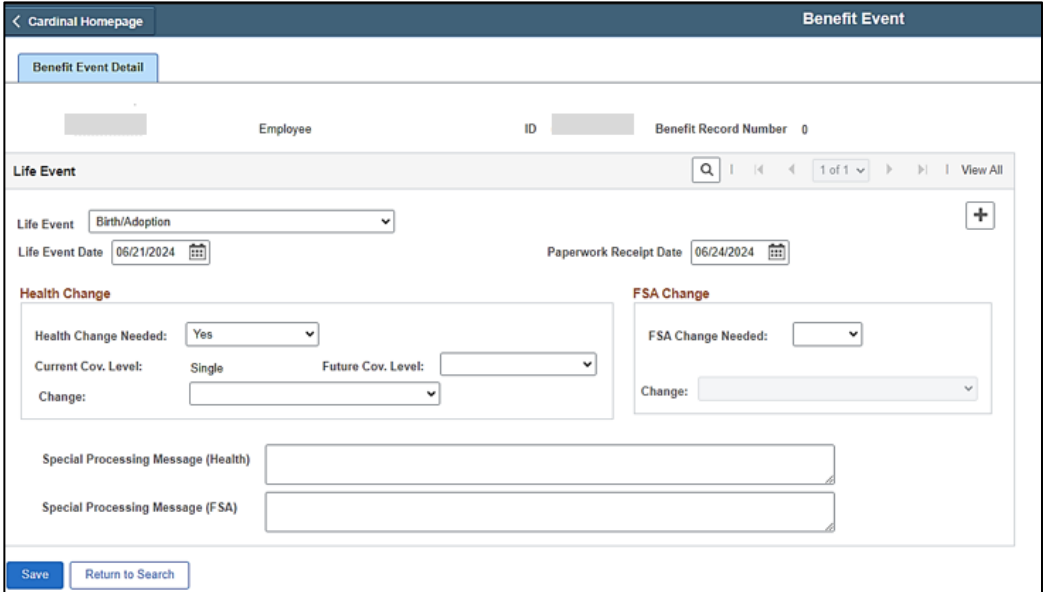

	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter the employee's Employee ID in the Search by field. 
	The other search by options available (Search by dropdown button) are Business Unit, Department, and Name.
3.	Click the Search button. 





BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Benefit Event page displays for the applicable employee.</p> 
4.	<p>Click the Life Event dropdown button and select the applicable type of Life Event (Birth/Adoption in this scenario).</p> 
	<p>Although this Benefit Event is being utilized to add the tag along dependent and not the newborn child, “Birth/Adoption” is still the correct selection here as this is the Life Event that opened up the employee’s eligibility to add the tag along dependent.</p> <p>The appropriate change reason associated with this selection will be made later in this process (Step 9).</p>
	<p>The Benefit Event page redisplay with the selected Life Event.</p> 

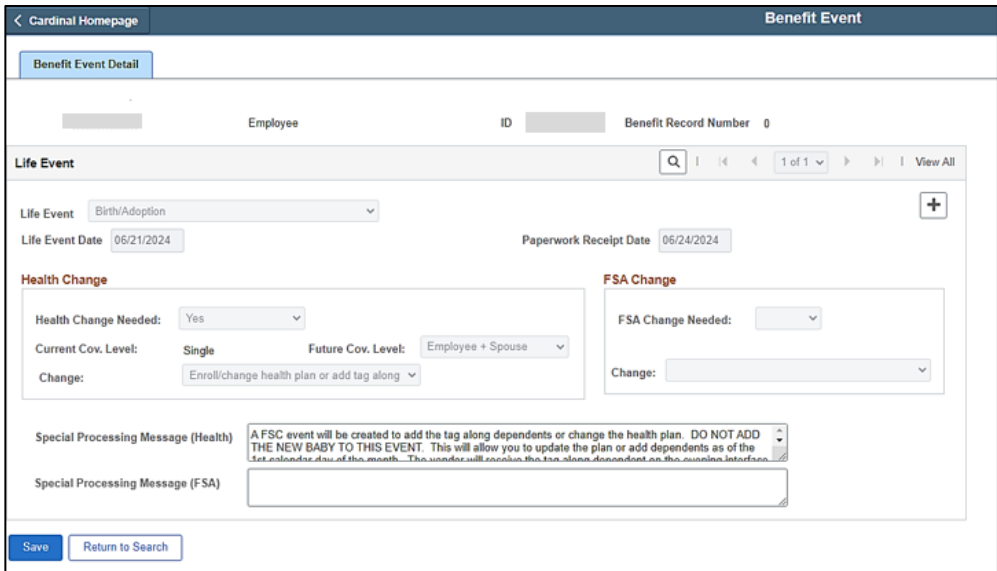

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
5.	<p>Click the Life Event Date Calendar icon and select the applicable date ("6/21/2024" in this scenario).</p> <p>This is the date of the actual birth.</p> 
6.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date ("6/24/2024" in this scenario).</p> <p>This is the date that the Benefits Enrollment form was received from the employee.</p> 
7.	<p>Click the Health Change Needed dropdown button and select "Yes".</p> 
	<p>Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select "Yes". If "Yes" is not selected, a Benefit Event will not be created.</p>
<p>The page refreshes.</p> 	
	<p>The Current Cov. Level field auto-populates with the employee's current Health Plan enrollment coverage level.</p>

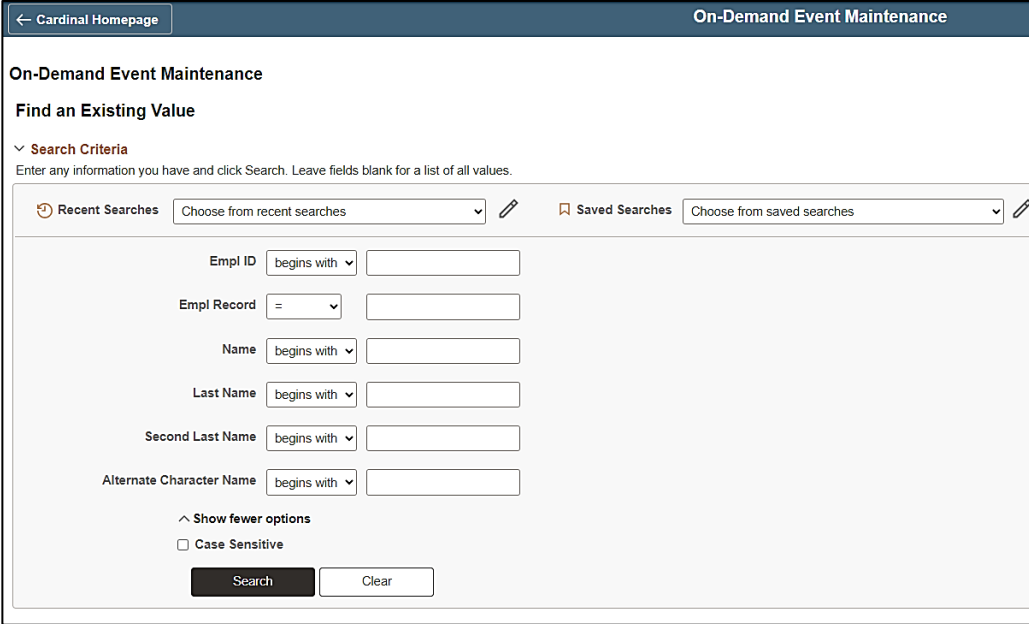



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
8.	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> <p>Future Cov. Level: <input type="text"/></p>
	<p>The coverage levels available for selection are:</p> <ul style="list-style-type: none"> • “Single, Employee” • “Employee + Spouse” • “Employee + CH (Child)” • “Family” <p>Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed. For this Benefit Event, only select the applicable coverage code based on the tag along dependent(s) being added. The coverage code will be changed again as needed when the Birth Event to add the newborn is created.</p>
9.	<p>Click the Change dropdown button and select “Enroll/change health plan or add tag along dependent (1st of the month)”.</p> <p>The selections available will vary based on the type of Life Event previously selected.</p> <p>Change: <input type="text"/></p>
	<p>Do not enter any information in the FSA Change section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.</p>
10.	<p>Click the Save button.</p> <p><input type="button" value="Save"/> <input type="button" value="Return to Search"/></p>

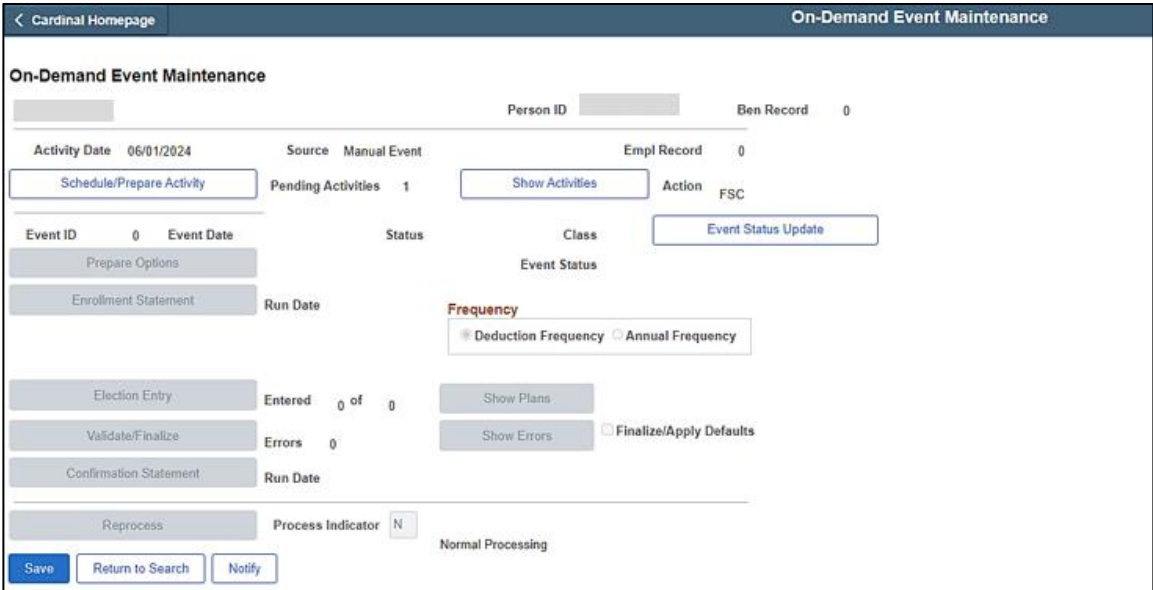



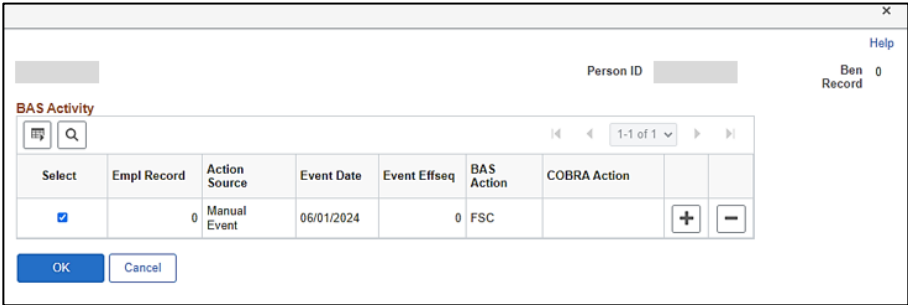
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The page refreshes after the save action completes.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>In this scenario, an FSC Benefit Event has been created solely for the purpose of adding and enrolling the employee's tag along dependent. This Benefit Event has a coverage begin date of the first of the current month ("6/1/2024" in this scenario). <u>Do not utilize this Benefit Event to add and enroll the newborn child dependent.</u></p> <p>The first Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
11.	<p>Navigate to the On-Demand Event Maintenance page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>

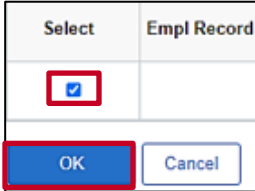
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
12.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
13.	<p>Click the Search button.</p> 

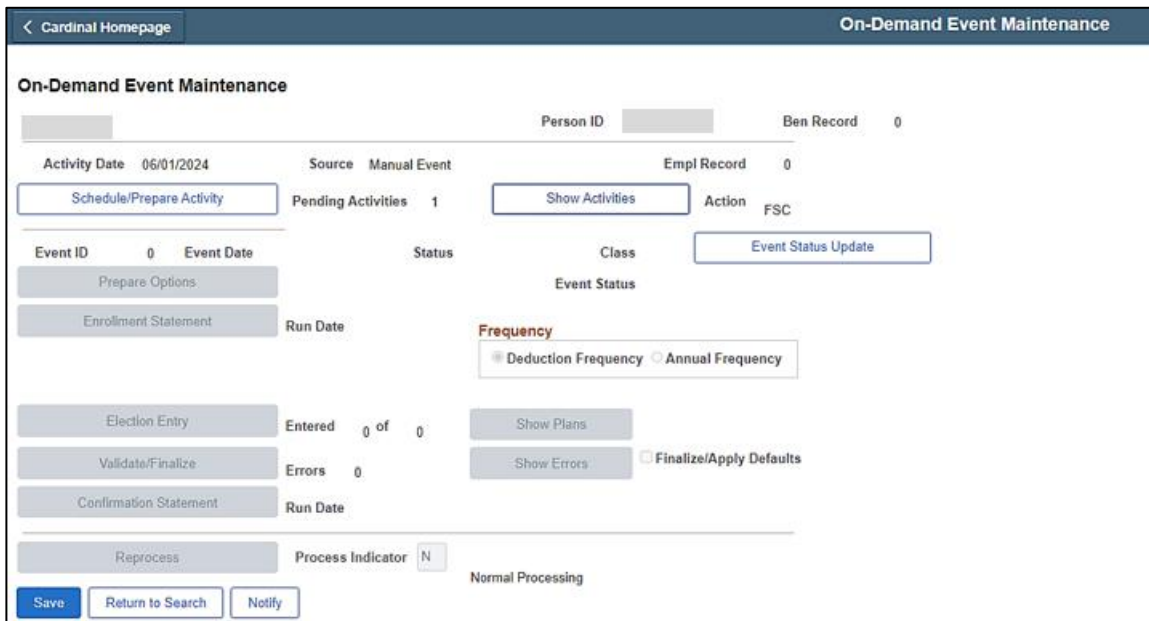
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page displays for the applicable employee.</p> 
	<p>Review the Activity Date field. For Life Events, this date auto-populates based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to add a tag along dependent based on a Birth Life Event. Therefore, the Activity Date field defaults to the first day of the month wherein the birth took place ("6/1/2024" in this scenario). Ensure that this date is accurate.</p> <p>The Source field will be "Manual Event". The Action field will default based on the type of Life Event ("FSC" in this scenario).</p> 
14.	<p>Click the Show Activities button.</p> 
	<p>The BAS Activity page displays in a pop-up window.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
15.	<p>Ensure that the Select checkbox option for the Benefit Event is selected and then click the OK button.</p> 

The **On-Demand Event Maintenance** page redisplay.



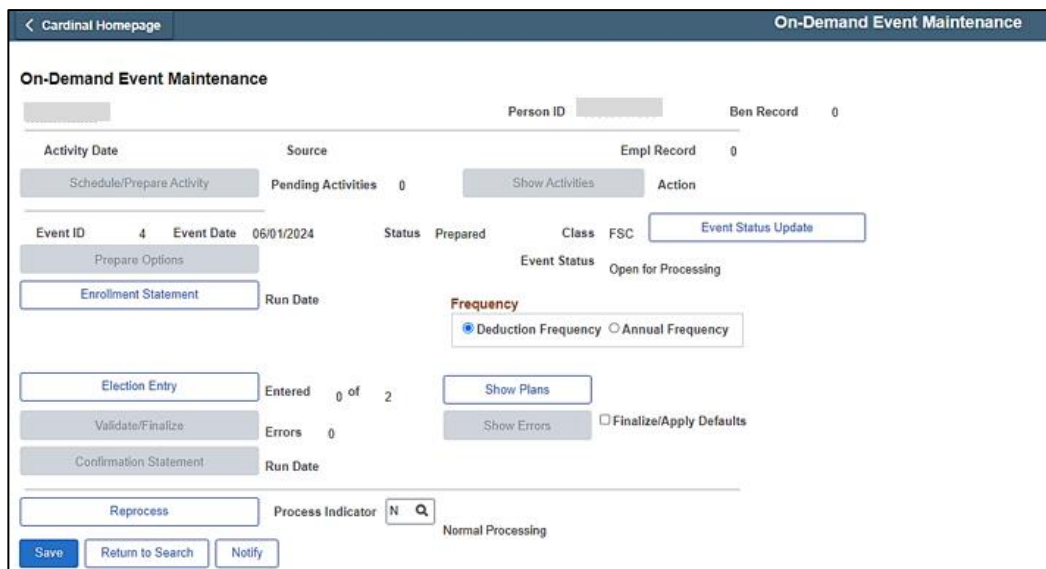
16. If the Benefits Administration process has already run, the **Schedule/Prepare Activity** button will be disabled, and the **Pending Activities** field will display a “0”. In this case, proceed to Step 19.

If the **Pending Activities** field displays a “1”, click the **Schedule/Prepare Activity** button.

Note: Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity.




BN361 Creating and Completing a Life Event on Behalf of an Employee

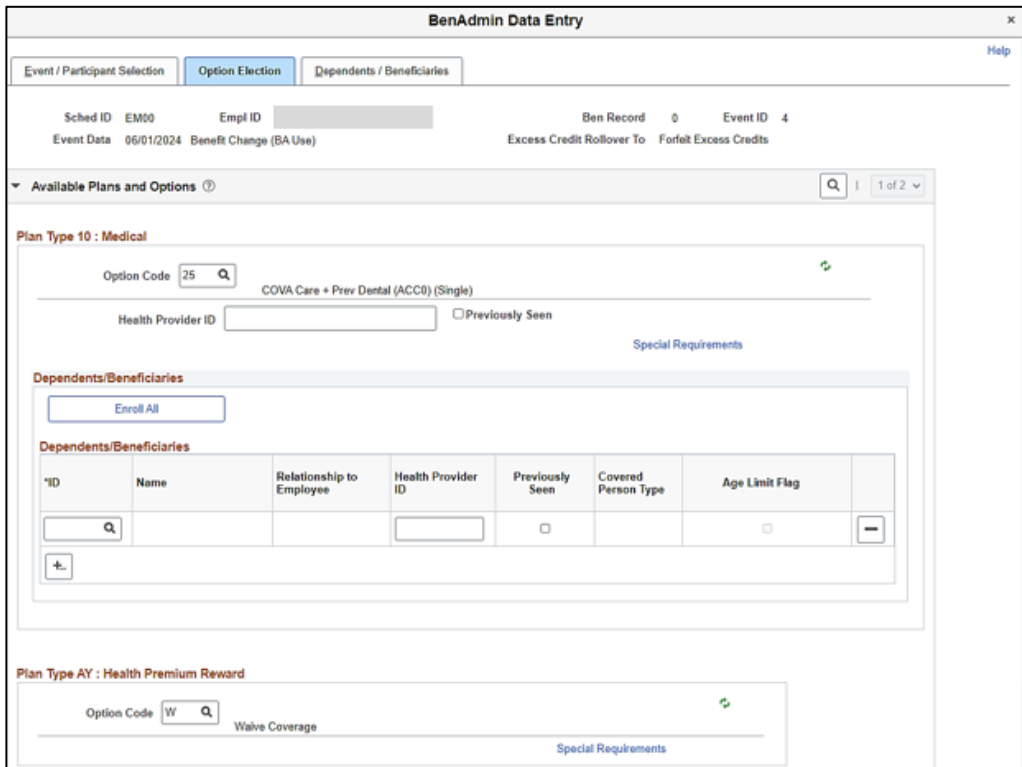
Step	Action
	<p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <div data-bbox="466 415 1156 644"> <p>Process completed successfully. (3000,530)</p> <p>OK</p> </div>
17.	<p>Click the OK button.</p> <div data-bbox="282 728 511 819"> <p>OK</p> </div>
	<p>The On-Demand Event Maintenance page redisplay.</p> <div data-bbox="290 898 1330 1463">  </div>
18.	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p> <div data-bbox="282 1585 758 1677"> <p>Status Prepared Class FSC Event Status</p> <p>Event Status Open for Processing</p> </div> <p>If these statuses do not display as indicated, please submit a VCCC Ticket with ‘Cardinal Benefits’ in the Subject line.</p>



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
19.	Click the Election Entry button. 



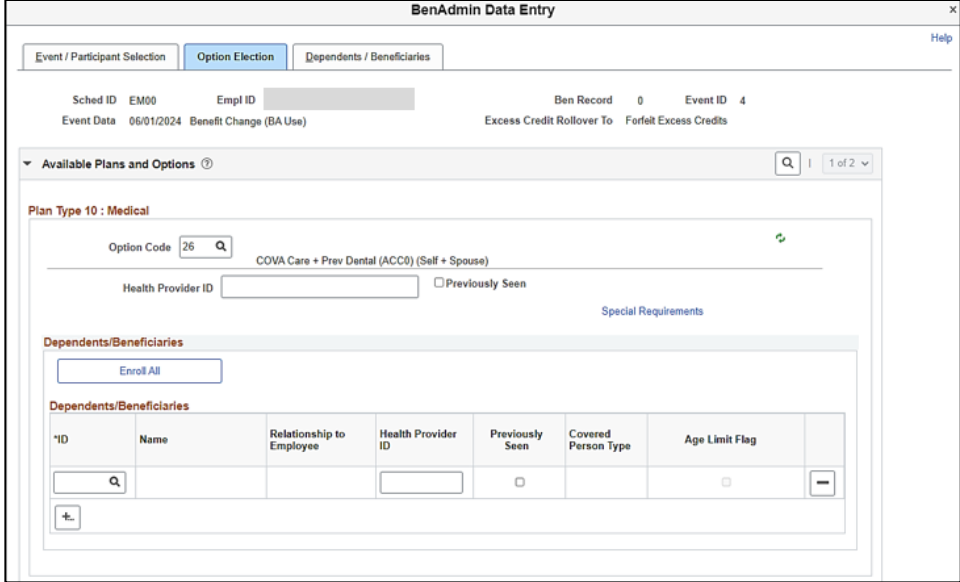

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.



The screenshot shows the BenAdmin Data Entry window with the 'Option Election' tab selected. The window displays the following information:

- Event / Participant Selection:** Sched ID EM00, Empl ID [redacted], Ben Record 0, Event ID 4.
- Event Data:** 06/01/2024, Benefit Change (BA Use), Excess Credit Rollover To: Forfeit Excess Credits.
- Available Plans and Options:** 1 of 2 plans are listed.
- Plan Type 10 : Medical:**
 - Option Code: 25
 - COVA Care + Prev Dental (ACC0) (Single)
 - Health Provider ID: [redacted] ☐ Previously Seen
 - Special Requirements: [link]
- Dependents/Beneficiaries:**
 - Enroll All button
 - Table with columns: ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, Age Limit Flag.
- Plan Type AY : Health Premium Reward:**
 - Option Code: W
 - Waive Coverage
 - Special Requirements: [link]

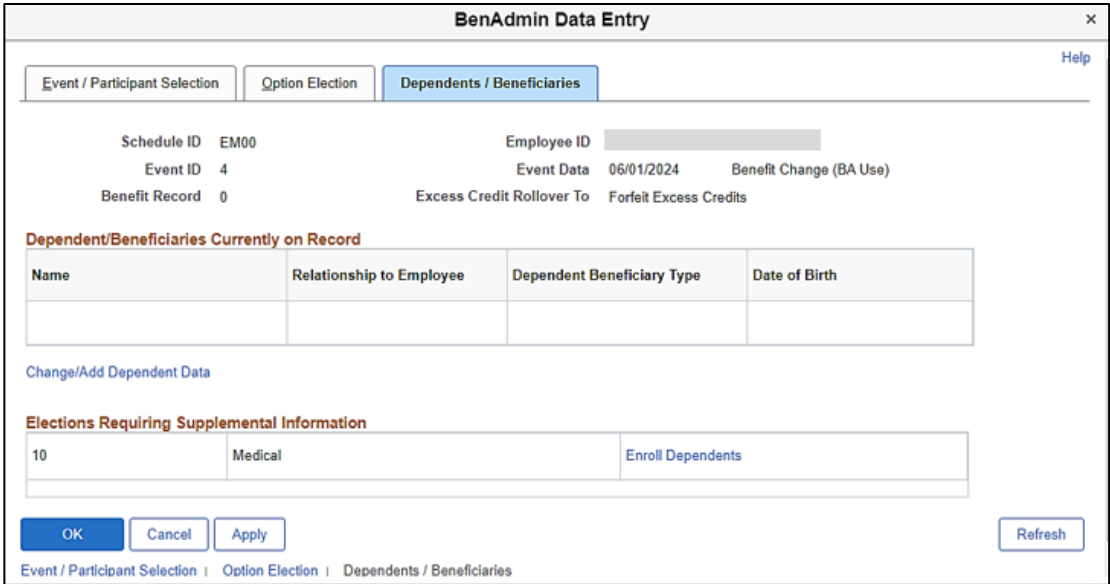

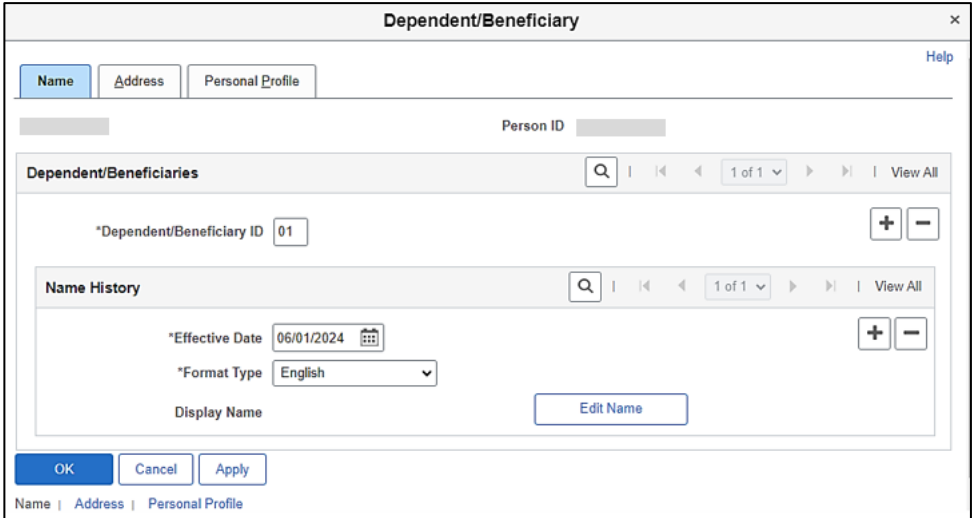
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
20.	<p>Select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the Option Code Look Up icon (magnifying glass) within the Plan Type 10: Medical section and select the applicable coverage code.</p> <p>The Coverage Codes are as follows:</p> <ul style="list-style-type: none"> • 1 – Single • 2 – Employee + Spouse • 3 – Employee + Child (except for Tricare) • 4 – Employee + 2 or More Dependents (Family – except for Tricare) • 8 – Employee + Child(ren) (Tricare only) • 9 – Family (EE + SP + Child/ren for Tricare only) 
	<p>For this Benefit Event, only select the applicable coverage code based on the tag along dependent(s) being added. The coverage code will be changed again as needed when the Birth Event to add the newborn is processed.</p>
<p>The Option Election tab redisplay.</p> 	
21.	<p>Click the Dependents / Beneficiaries tab to add the tag along dependent(s).</p> 


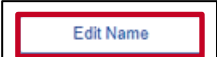
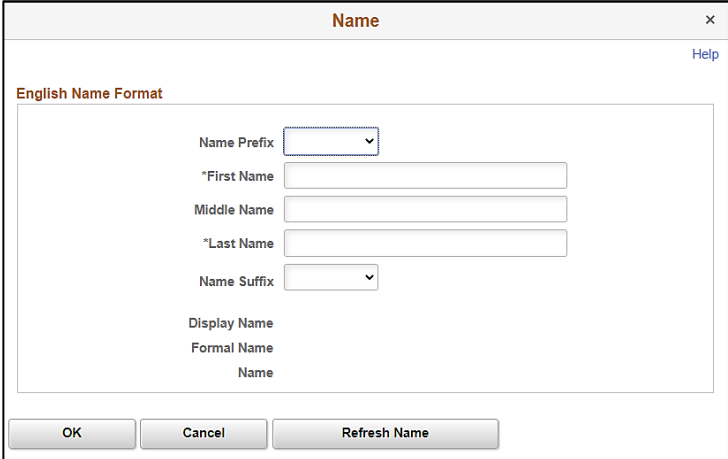




Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

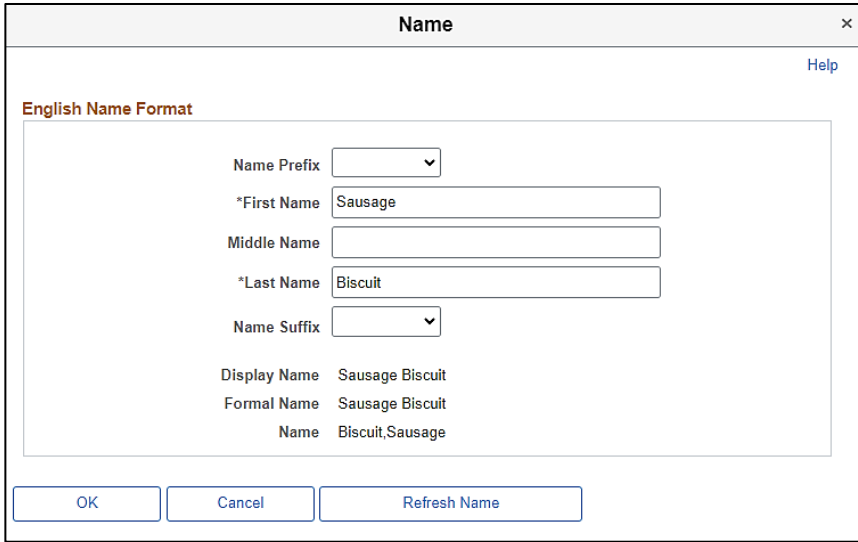


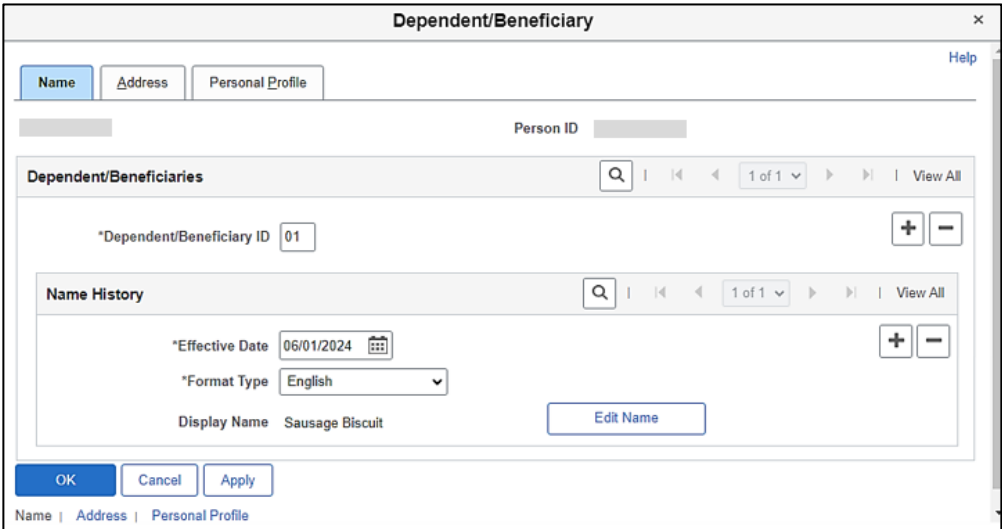
Step	Action
	<p>The Dependent / Beneficiaries tab displays.</p> 
22.	<p>Click the Change/Add Dependent Data link.</p> 
	<p>The Dependent/Beneficiary page displays in a pop-up window with the Name tab displayed by default.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee



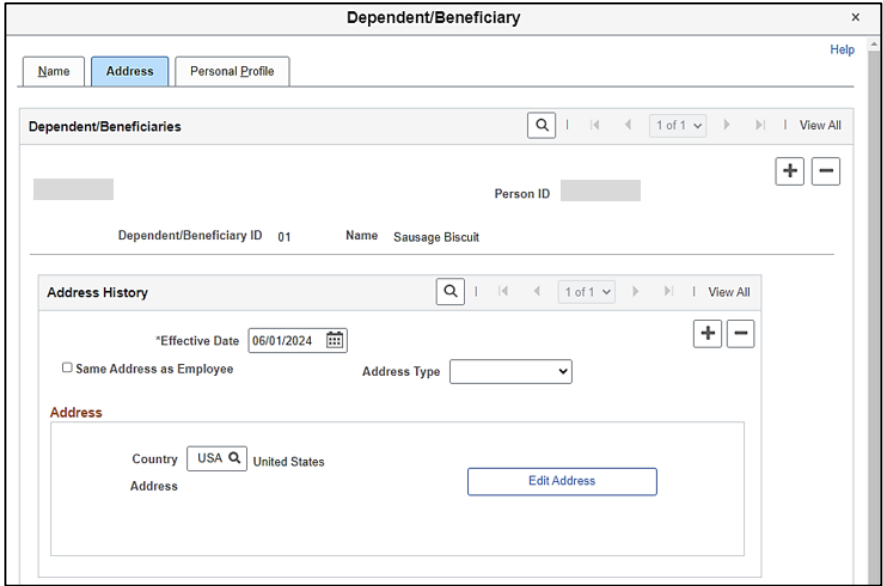
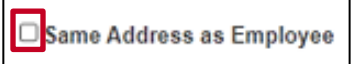

Step	Action
	<p>For Life Events, the Effective Date field defaults to the date that the coverage will begin (in this scenario, a tag along dependent is being added based on a Birth event. Therefore, the Effective Date field defaults to the first day of the month wherein the birth took place). Do not change this date as it must match the Event Date, or the system will not recognize this dependent as eligible for coverage.</p> <p>The Dependent/Beneficiary ID field will default to the next available Dependent/Beneficiary ID number ("01" in this scenario) and increment by 1 for each additional dependent subsequently added.</p>
23.	<p>Click the Edit Name button.</p> 
<p>The Name page displays in a pop-up window.</p> 	
24.	<p>At a minimum, enter the dependent's first and last name in the corresponding fields. The Name Prefix, Middle Name, and Name Suffix fields are optional but should be entered as applicable.</p> <p>Note: Do not use accent marks or special characters in the name fields. These are not recognized and can cause errors when uploading to the Vendor.</p> 
25.	<p>Click the Refresh Name button.</p> 



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Name page refreshes.</p> <div></div>
	The Display Name , Formal Name , and Name fields will populate based on the name information entered.
26.	<p>Click the OK button.</p> <div></div>
	<p>The Name tab redisplay.</p> <div></div>

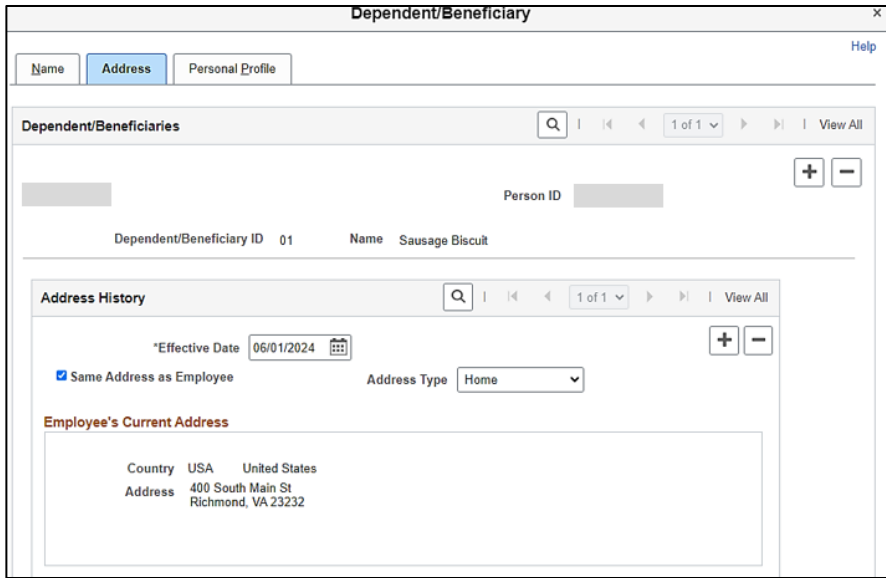

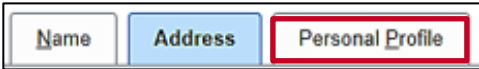
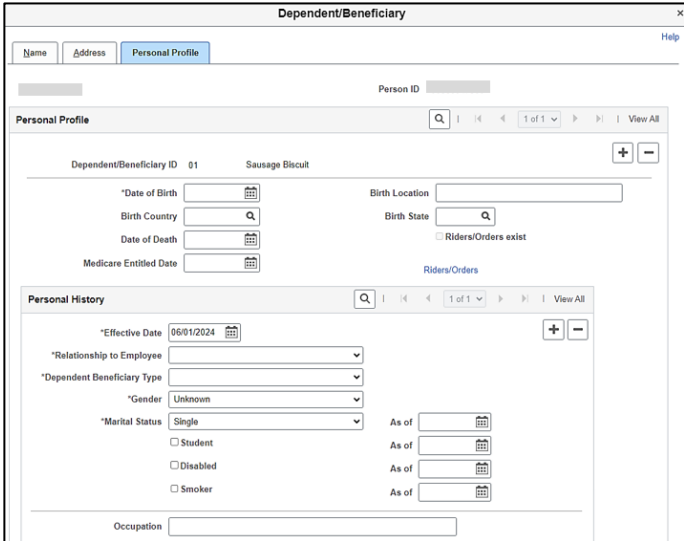
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Display Name field auto-populates with the name information previously entered.
27.	<p>Click the Address tab.</p> 
<p>The Address tab displays.</p> 	
28.	<p>Complete the address information as applicable for the dependent by clicking the Same Address as Employee checkbox option (applicable for this scenario).</p> 
	<p>Users can also complete the address information as applicable for the dependent by selecting the applicable Address Type using the dropdown button provided and then clicking the Edit Address button (the Edit Address page will display in a pop-up window, and the applicable address information can be entered).</p>











Benefits Job Aid

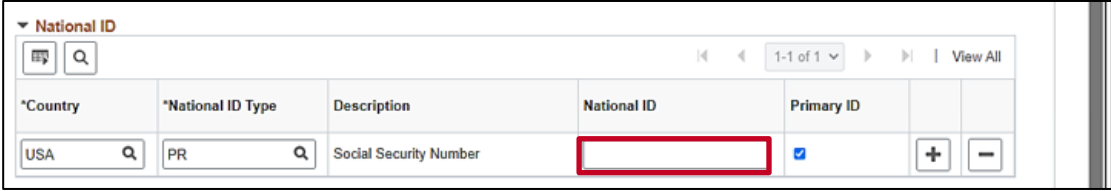


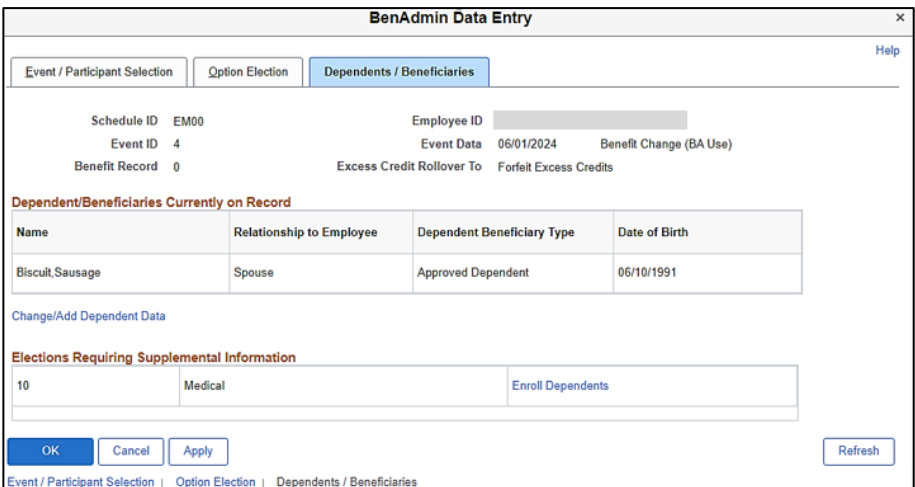

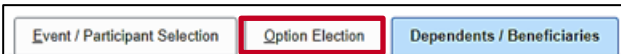
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Address tab refreshes.</p> 
	The address information auto-populates in the Employee's Current Address section.
29.	<p>Click the Personal Profile tab.</p> 
	<p>The Personal Profile tab displays.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee

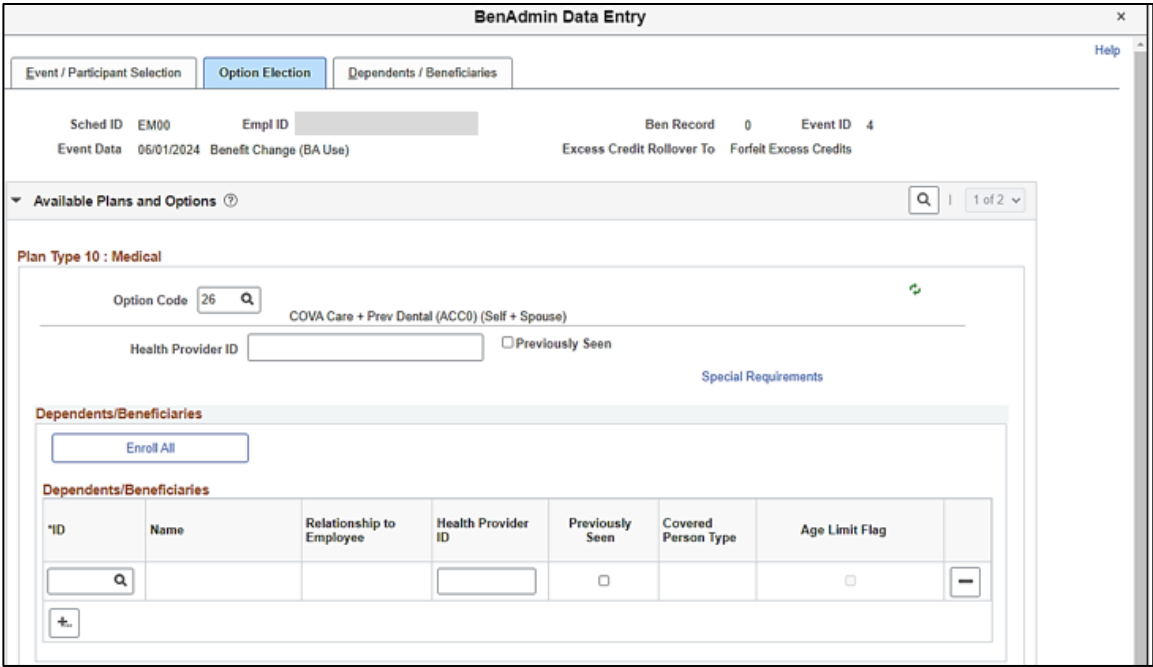


Step	Action
	<p>The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields.</p> <p>The Student and Smoker checkbox options are not required in Cardinal, and this information is not transmitted to the Plan Provider (Vendor).</p>
30.	<p>Click the Date of Birth Calendar icon and select the dependent's date of birth.</p> 
31.	<p>Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee ("Spouse" in this scenario).</p> 
32.	<p>Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent".</p> 
	<p>"Approved Dependent" is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.</p>
33.	<p>Click the Gender dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Female" in this example).</p> 
34.	<p>The Marital Status field defaults to "Single". Update as needed for the dependent ("Married" in this scenario).</p> 
	<p>If any status other than "Single" is selected, select the applicable date using the Marital Status As of Calendar icon ("4/22/2020" in this scenario).</p>
35.	<p>Click the vertical scrollbar to scroll down on the page to the National ID section.</p>

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Step	Action
36.	<p>Enter the dependent's Social Security Number (SSN) in the National ID field.</p> 
	<p>If the employee did not provide the dependent's SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event.</p> <p>Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.</p>
37.	<p>Click the OK button.</p> 
<p>The Dependents / Beneficiaries tab redisplay.</p> 	
	<p>The dependent just added displays in the Dependent/Beneficiaries Currently on Record section.</p> <p>If additional tag along dependents needs to be added, repeat Steps 22 – 40 for each additional tag along dependent (in this scenario, no additional tag along dependents are being added).</p>
38.	<p>Click the Option Election tab.</p> 



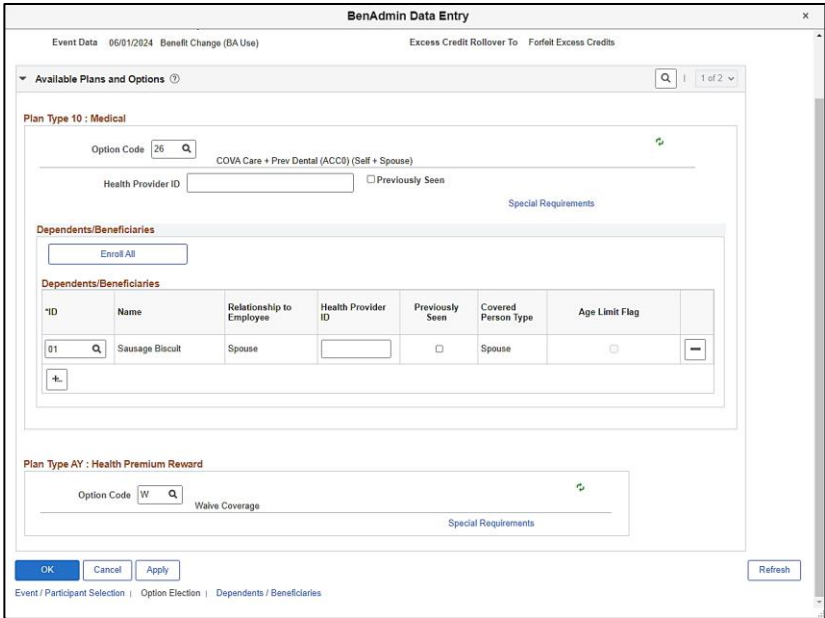


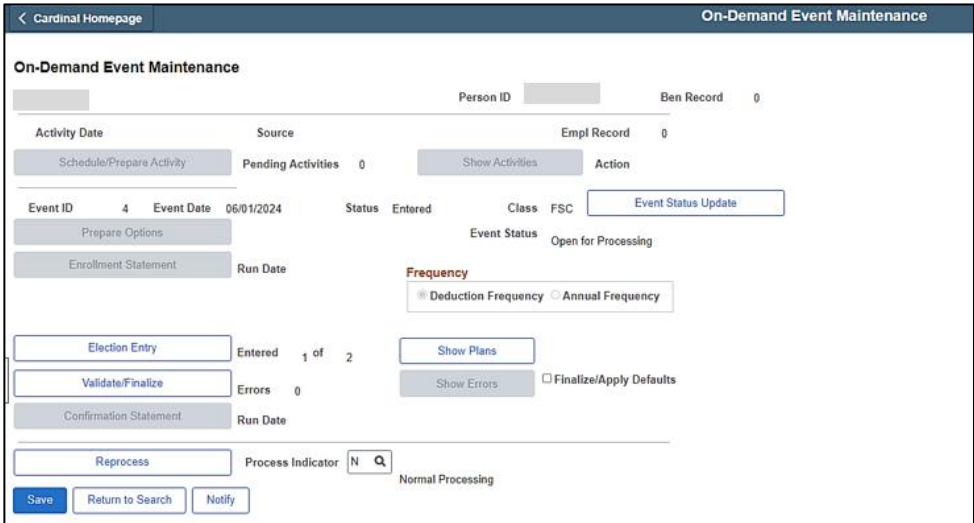
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Option Election tab redisplay.</p> 
39.	<p>Next, enroll the dependent(s) in the previously selected Medical Plan by clicking the Enroll All button if all dependents will be enrolled (applicable for this scenario).</p> 
	<p>Users can also enroll the dependent(s) in the previously selected Medical Plan by adding the applicable dependents individually using the ID Look Up icon within the Dependents/Beneficiaries section.</p> <p>Additional rows can be added in this section by clicking the Add Multiple Rows icon (+...).</p>





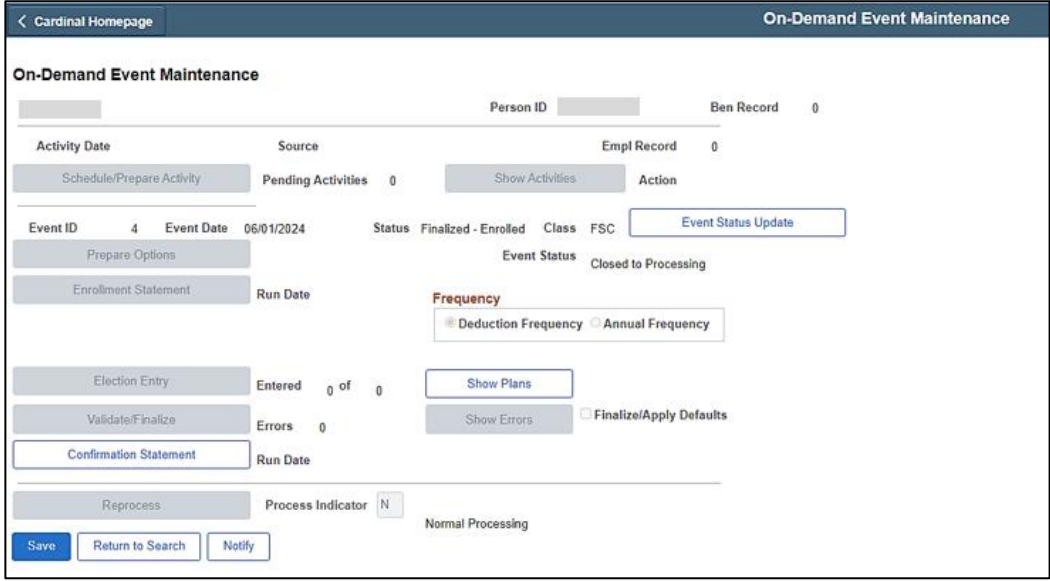



Benefits Job Aid

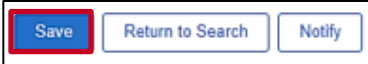

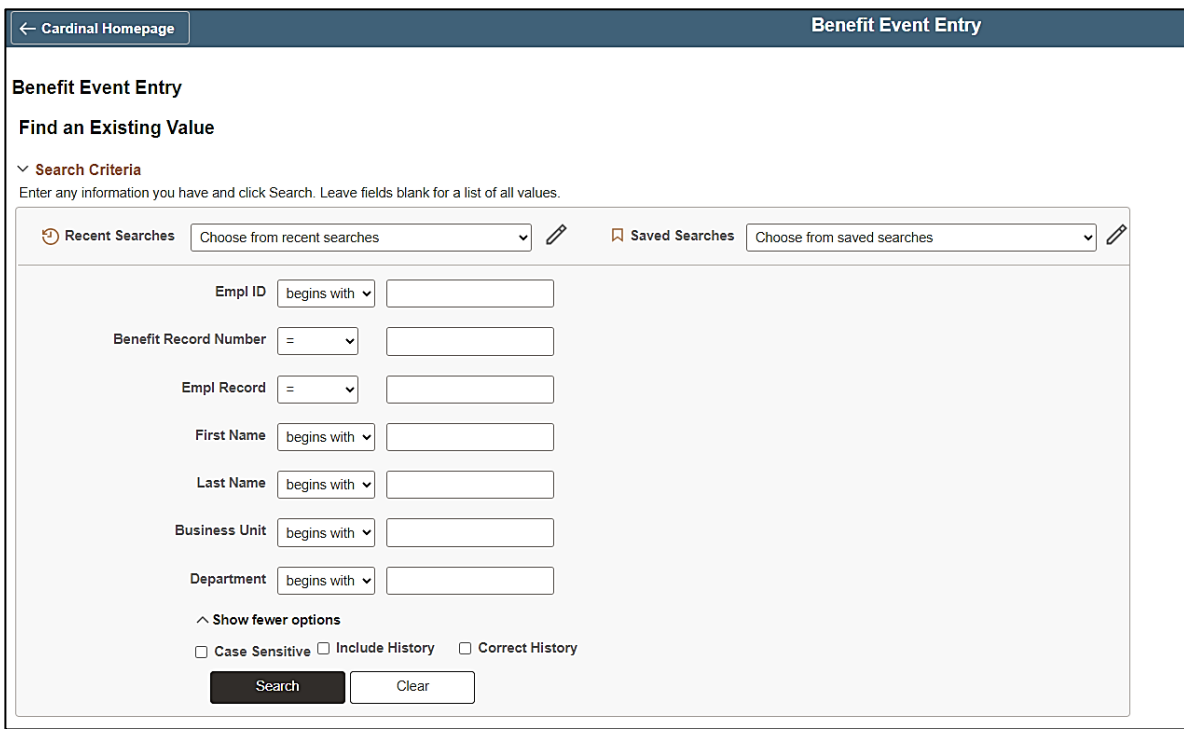

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The page refreshes.</p> 
	<p>The enrolled dependents display in the Dependents/Beneficiaries section. Validate for accuracy and ensure that all applicable dependents are listed.</p>
40.	<p>Click the OK button.</p> 
	<p>The On-Demand Event Maintenance page redisplay.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.
41.	<p>Click the Validate/Finalize button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.</p> 
<p>A Confirmation message displays in a pop-up window once the process completes.</p> 	
42.	<p>Click the OK button.</p> 
<p>The On-Demand Event Maintenance page redisplay.</p> 	
	The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.



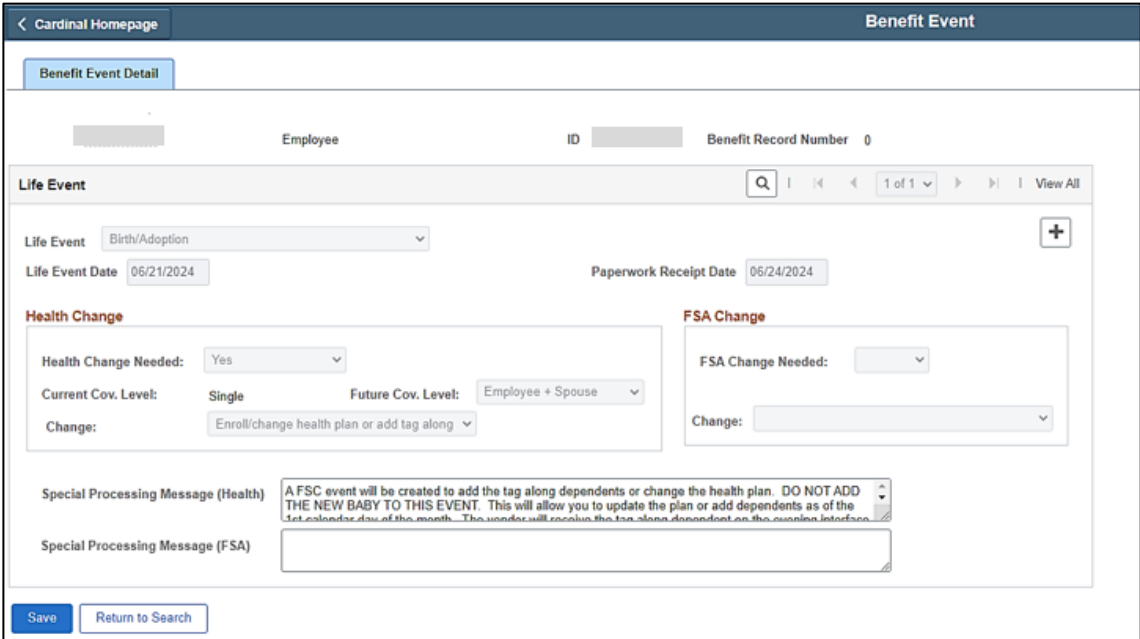

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
43.	<p>Click the Save button.</p> 
	<p>This Benefit Event to add the tag along dependent(s) is now complete. Refer to the Viewing the Employee's Benefit Information section of this Job Aid for instructions on how to validate accuracy.</p> <p>Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee. This information will be transmitted to the Health Vendor in the evening interface file. On the next business day, proceed with Step 44.</p> <p>Next, the Benefit Event must be created in order to add the newborn child dependent.</p>
44.	<p>Navigate to the Benefit Event page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event</p>
<p>The Benefit Event Entry Find an Existing Value page displays.</p> 	
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>



Benefits Job Aid

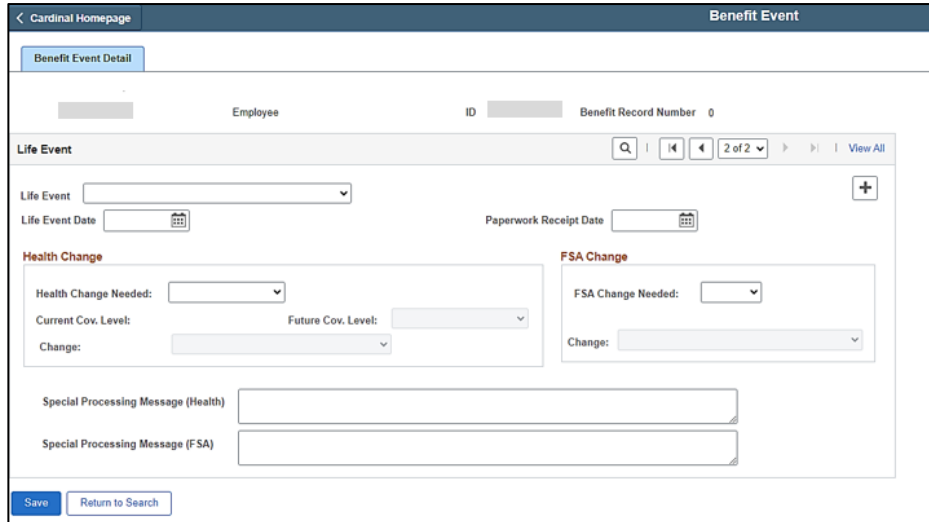

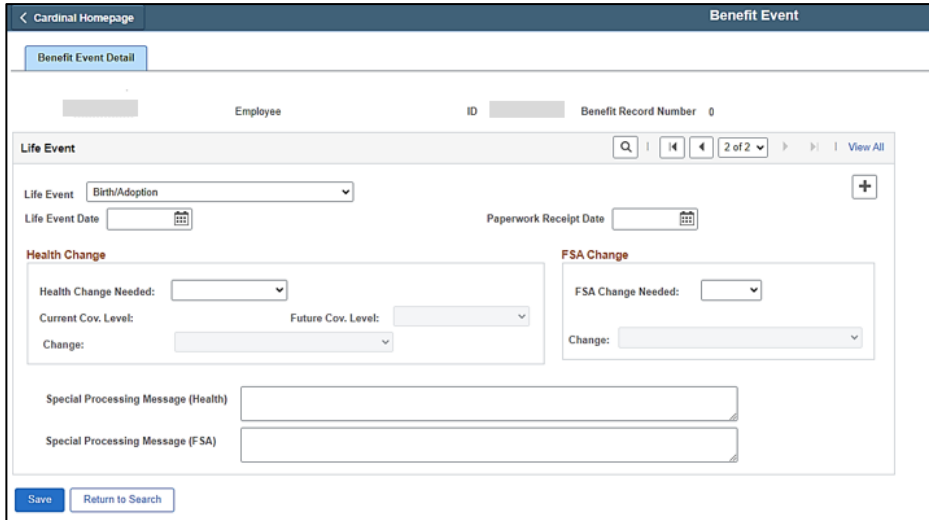
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
45.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>The other search by options available (Search by dropdown button) are Business Unit, Department, and Name.</p> 
46.	<p>Click the Search button.</p> 
<p>The Benefit Event page displays for the applicable employee.</p> 	
47.	<p>Click the Add a new row icon (+).</p> 





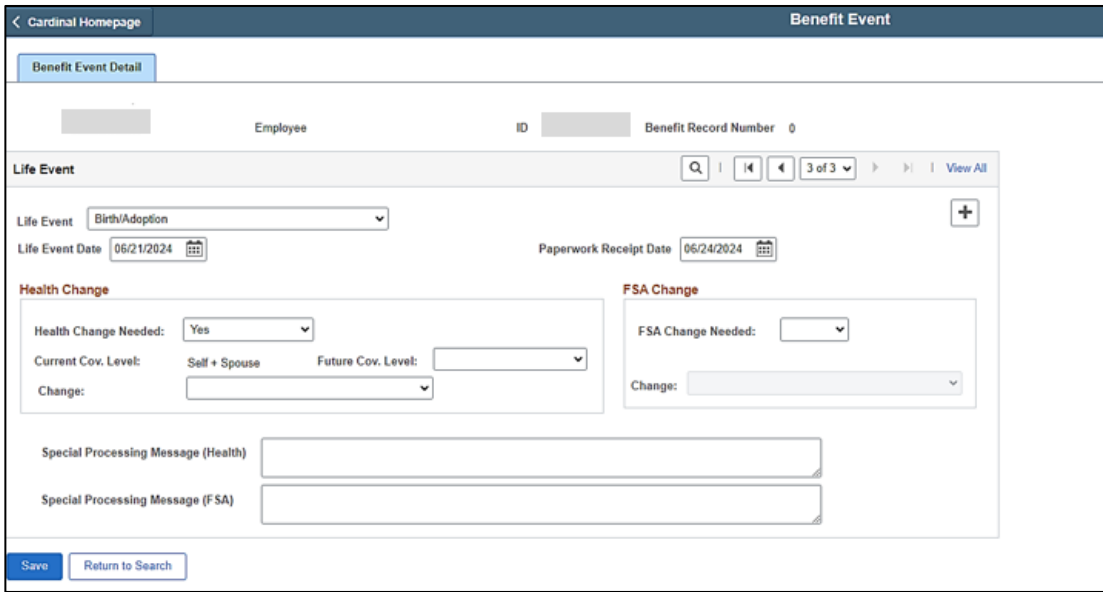



Benefits Job Aid



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The page refreshes and the new row displays.</p>  <p>The screenshot shows the 'Benefit Event' page in the Cardinal system. The 'Life Event' dropdown menu is open, showing a list of options. The 'Birth/Adoption' option is highlighted. The page also displays fields for 'Life Event Date', 'Paperwork Receipt Date', 'Health Change', and 'FSA Change'.</p>
48.	<p>Click the Life Event dropdown button and select the applicable type of Life Event (Birth/Adoption in this scenario).</p>  <p>The screenshot shows the 'Life Event' dropdown menu with 'Birth/Adoption' selected. The dropdown menu is open, showing a list of options. The 'Birth/Adoption' option is highlighted.</p>
	<p>The Benefit Event page redisplay with the selected Life Event.</p>  <p>The screenshot shows the 'Benefit Event' page in the Cardinal system. The 'Life Event' dropdown menu is open, showing a list of options. The 'Birth/Adoption' option is highlighted. The page also displays fields for 'Life Event Date', 'Paperwork Receipt Date', 'Health Change', and 'FSA Change'.</p>

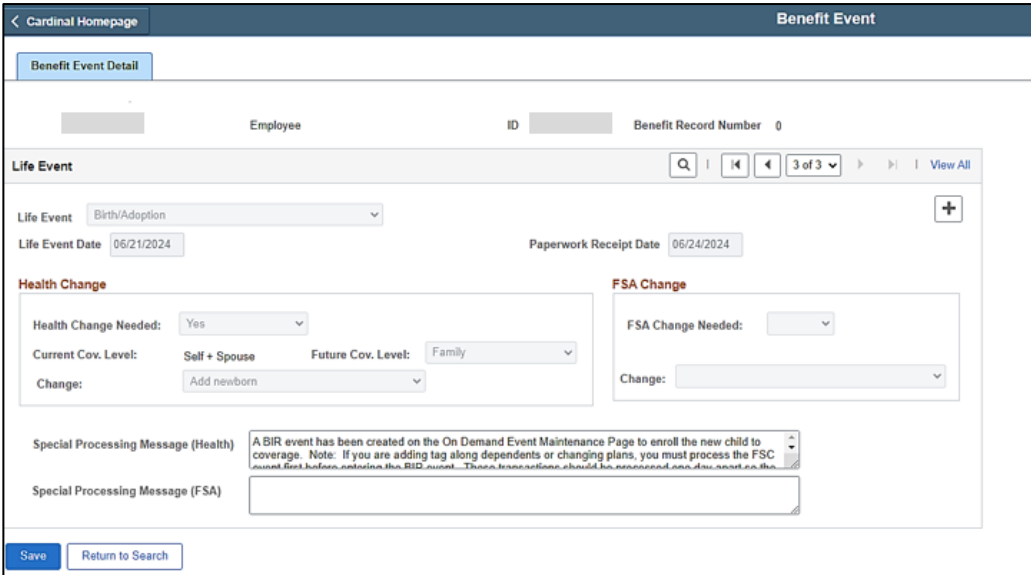

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
49.	<p>Click the Life Event Date Calendar icon and select the applicable date (“6/21/2024” in this scenario).</p> <p>This is the date of birth for the newborn dependent.</p> 
50.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date (“6/24/2024” in this scenario).</p> <p>This is the date that the Benefits Enrollment form was received from the employee.</p> 
51.	<p>Click the Health Change Needed dropdown button and select “Yes”.</p> 
	<p>Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes”. If “Yes” is not selected, a Benefit Event will not be created.</p>
<p>The page refreshes.</p> 	
	<p>The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.</p>

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Step	Action
52.	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> <p>Future Cov. Level: <input type="text"/></p>
	<p>The coverage levels available for selection are:</p> <ul style="list-style-type: none"> • “Single, Employee” • “Employee + Spouse” • “Employee + CH (Child)” • “Family” <p>Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed. For this Benefit Event, select the applicable coverage code based on the newborn dependent being added.</p>
53.	<p>Click the Change dropdown button and select “Add newborn”.</p> <p>The selections available will vary based on the type of Life Event previously selected.</p> <p>Change: <input type="text"/></p>
	<p>Do not enter any information in the FSA Change section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.</p>
54.	<p>Click the Save button.</p> <p><input type="button" value="Save"/> <input type="button" value="Return to Search"/></p>

BN361 Creating and Completing a Life Event on Behalf of an Employee

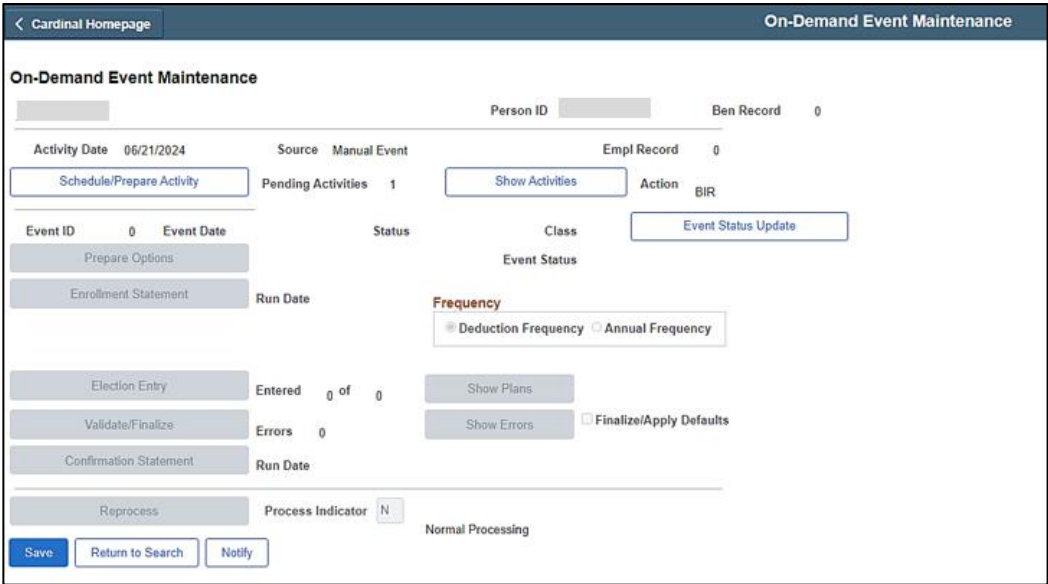

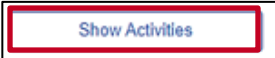
Step	Action
	<p>The page refreshes after the save action completes.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>In this scenario, a BIR Benefit Event has been created for the purpose of adding and enrolling the employee's newborn dependent. This Benefit Event has a coverage begin date of the actual date of birth ("6/21/2024" in this scenario).</p> <p>This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
55.	<p>Navigate to the On-Demand Event Maintenance page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>



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Step	Action
	<p>The On-Demand Event Maintenance Search page displays.</p> <div></div>
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
56.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> <div></div>
57.	<p>Click the Search button.</p> <div></div>

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Step	Action
	<p>The On-Demand Event Maintenance page displays for the applicable employee.</p> 
	<p>Review the Activity Date field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to add a newborn dependent based on a Birth Life Event. Therefore, the Activity Date field defaults to the date of birth (“6/21/2024” in this scenario). Ensure that this date is accurate.</p> <p>The Source field will be “Manual Event”. The Action field will default based on the type of Life Event (“BIR” in this scenario).</p>
58.	<p>Click the Show Activities button.</p> 



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **BAS Activity** page displays in a pop-up window.

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	06/21/2024	0	BIR	

59. Ensure that the **Select** checkbox option for the Benefit Event is selected and then click the **OK** button.

Select	Empl Record
<input checked="" type="checkbox"/>	

OK Cancel

The **On-Demand Event Maintenance** page redisplay.

On-Demand Event Maintenance

Person ID: [] Ben Record: 0

Activity Date: 06/21/2024 Source: Manual Event Empl Record: 0

Pending Activities: 1

Event ID: 0 Event Date: [] Status: [] Class: [] Event Status: []


Frequency: ☒ Deduction Frequency ☐ Annual Frequency

Entered: 0 of 0 Errors: 0

Process Indicator: N Normal Processing

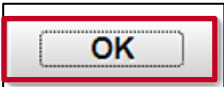


BN361 Creating and Completing a Life Event on Behalf of an Employee

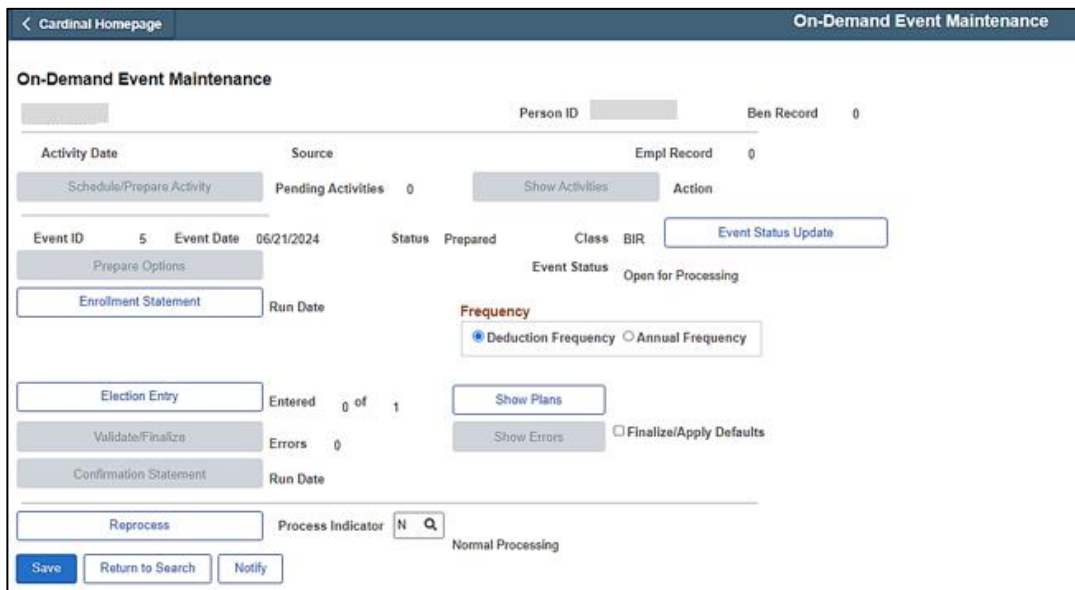
Step	Action
60.	<p>If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a "0". In this case, proceed to Step 69.</p> <p>If the Pending Activities field displays a "1", click the Schedule/Prepare Activity button.</p> <p>Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity.</p> 

A **Confirmation** message displays in a pop-up window once the automated program completes.



61.	<p>Click the OK button.</p> 
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The **On-Demand Event Maintenance** page redisplay.



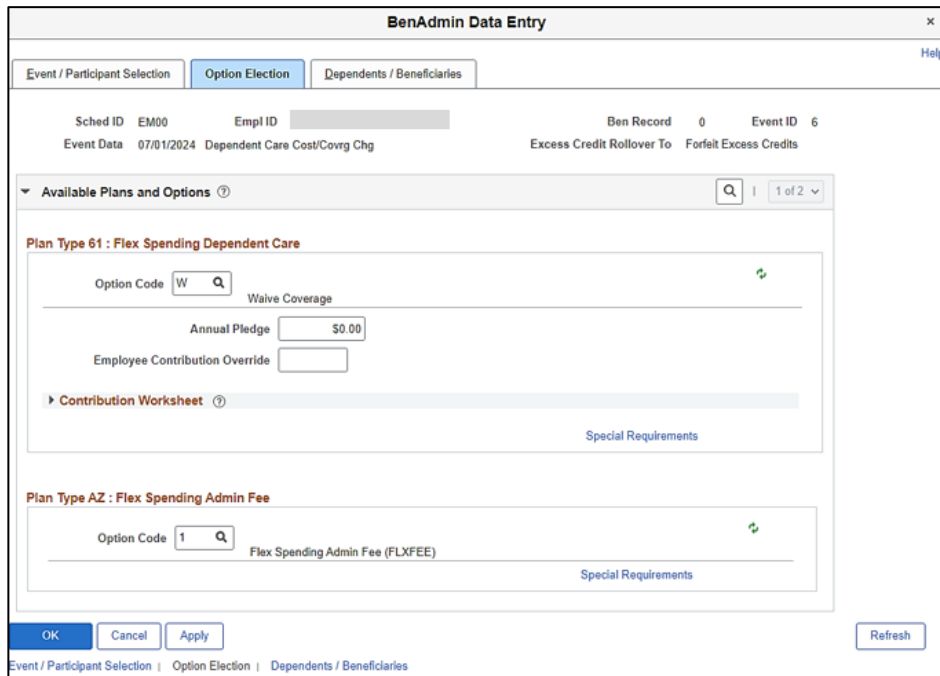
The screenshot shows the 'On-Demand Event Maintenance' page. At the top, there's a navigation bar with 'Cardinal Homepage' and 'On-Demand Event Maintenance'. Below this, the page title 'On-Demand Event Maintenance' is displayed. The main area contains several sections: 'Person ID' and 'Ben Record' fields; 'Activity Date', 'Source', and 'Empl Record' fields; a 'Schedule/Prepare Activity' button; 'Pending Activities' (0); a 'Show Activities' button; and an 'Action' button. Below these, there's a section for 'Event ID' (5), 'Event Date' (06/21/2024), 'Status' (Prepared), 'Class' (BIR), and 'Event Status' (Open for Processing). There are buttons for 'Prepare Options', 'Enrollment Statement', 'Run Date', 'Frequency' (Deduction Frequency selected), 'Election Entry', 'Entered' (0 of 1), 'Show Plans', 'Validate/Finalize', 'Errors' (0), 'Show Errors', 'Finalize/Apply Defaults', 'Confirmation Statement', 'Run Date', 'Reprocess', 'Process Indicator' (N), and 'Normal Processing'. At the bottom, there are 'Save', 'Return to Search', and 'Notify' buttons.



BN361 Creating and Completing a Life Event on Behalf of an Employee

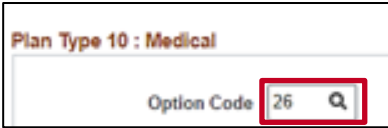

Step	Action
	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p>  <p>If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.</p>
62.	<p>Click the Election Entry button.</p> 

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

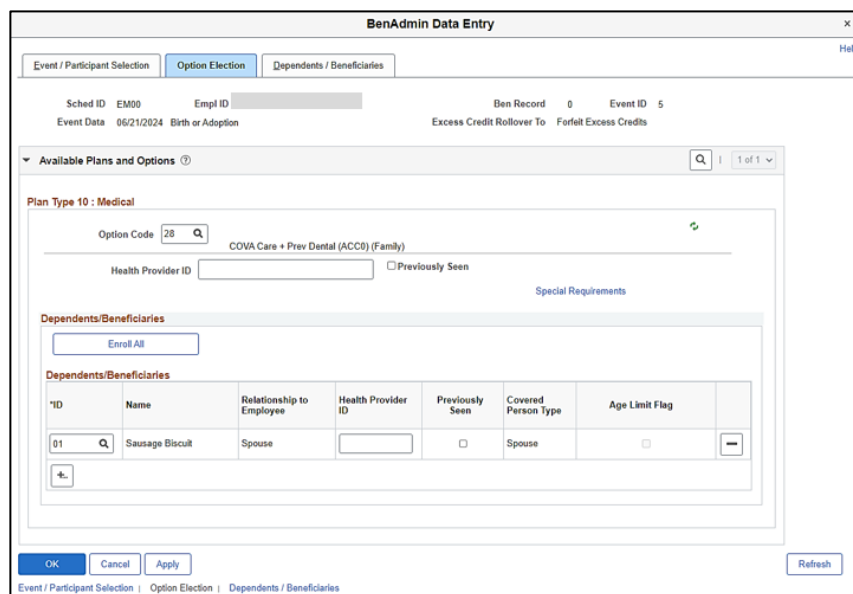


The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The window displays fields for 'Sched ID' (EM00), 'Empl ID' (redacted), 'Ben Record' (0), and 'Event ID' (6). Below these fields, there is a section for 'Available Plans and Options' with a search bar and a dropdown menu. The first plan listed is 'Plan Type 61 : Flex Spending Dependent Care', which includes fields for 'Option Code' (W), 'Waive Coverage', 'Annual Pledge' (\$0.00), and 'Employee Contribution Override'. The second plan listed is 'Plan Type AZ : Flex Spending Admin Fee', which includes fields for 'Option Code' (1) and 'Flex Spending Admin Fee (FLXFEE)'. At the bottom of the window, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'.

BN361 Creating and Completing a Life Event on Behalf of an Employee

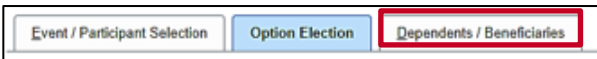
Step	Action
63.	<p>Select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the Option Code Look Up icon (magnifying glass) within the Plan Type 10: Medical section and select the applicable coverage code.</p> <p>The Coverage Codes are as follows:</p> <ul style="list-style-type: none"> • 1 – Single • 2 – Employee + Spouse • 3 – Employee + Child (except for Tricare) • 4 – Employee + 2 or More Dependents (Family – except for Tricare) • 8 – Employee + Child(ren) (Tricare only) • 9 – Family (EE + SP + Child/ren for Tricare only) 
	<p>For this Benefit Event, select the applicable coverage code based on the newborn dependent being added. If the coverage code does not need to be changed based on the addition of the newborn dependent, proceed with Step 64.</p> <p>Please note that this Birth Event only allows the employee to change the coverage code. The actual Health Plan election cannot be changed.</p>

The **Option Election** tab redisplay.

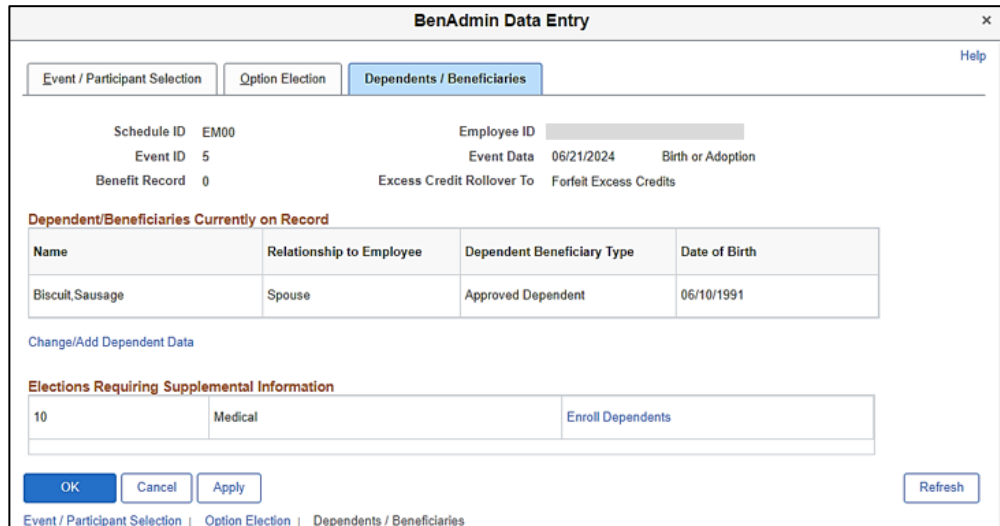


The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The 'Available Plans and Options' section is expanded, showing 'Plan Type 10: Medical'. Under this plan, 'Option Code 28' is selected, with a magnifying glass icon next to it. Below the option code, there is a checkbox for 'Previously Seen' and a 'Special Requirements' link. The 'Dependents/Beneficiaries' section is also visible, showing a table with columns for ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag. A dependent named 'Sausage Biscuit' is listed with a relationship of 'Spouse'. At the bottom of the window, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'.

BN361 Creating and Completing a Life Event on Behalf of an Employee

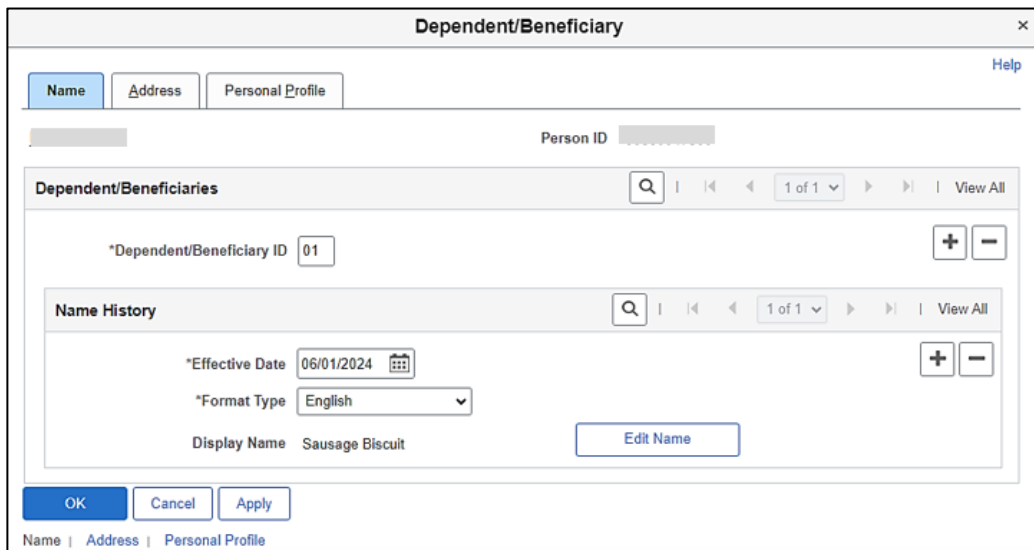
Step	Action
64.	Click the Dependents / Beneficiaries tab to add the newborn dependent. 

The **Dependent / Beneficiaries** tab displays.


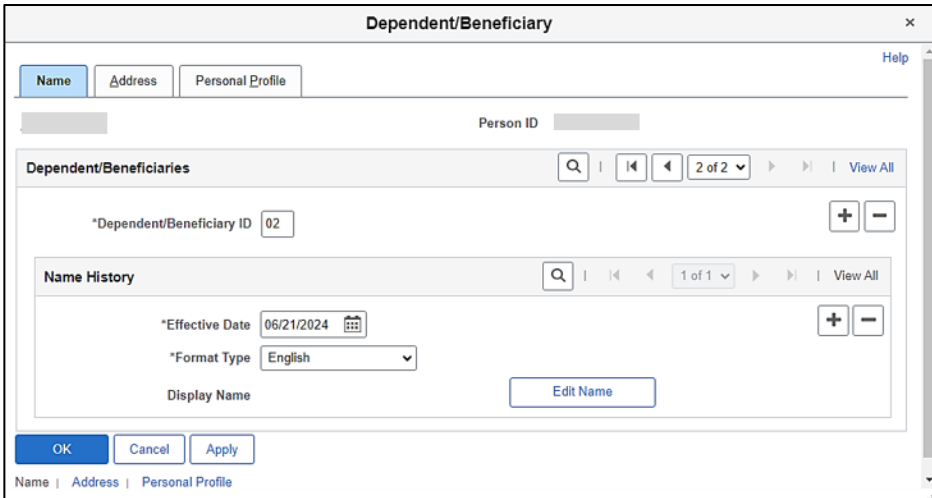




65.	Click the Change/Add Dependent Data link. 
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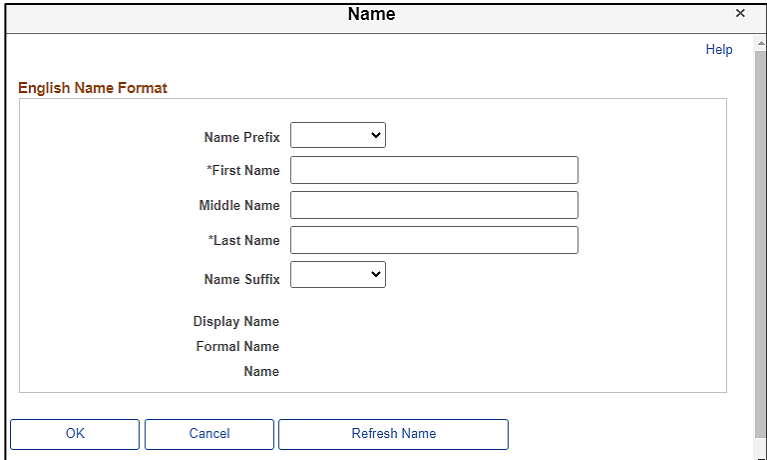


The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.



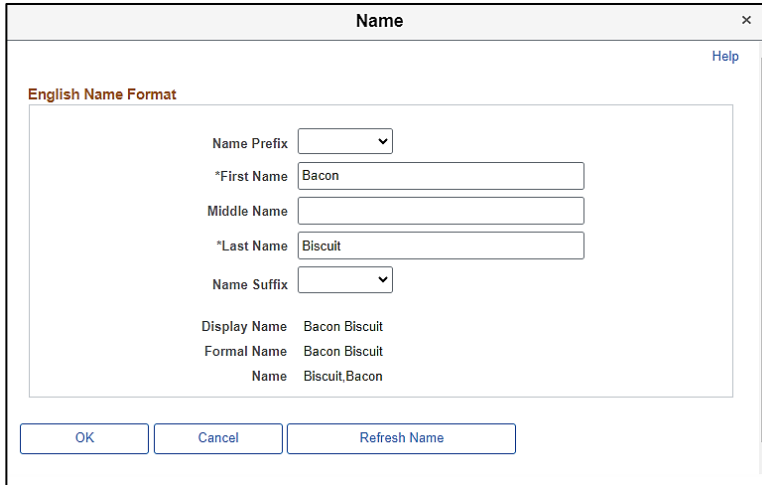


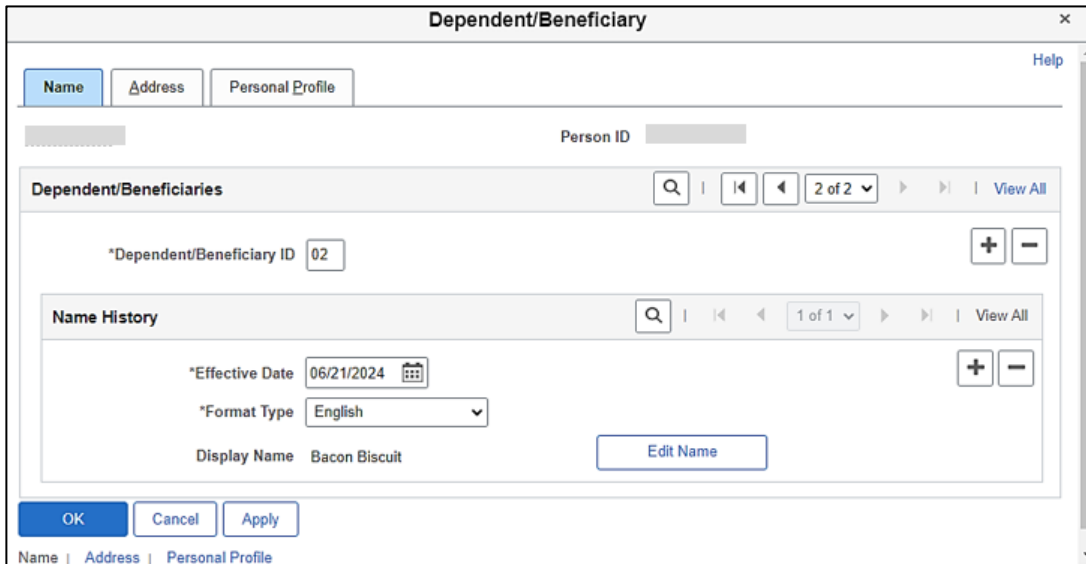
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
66.	<p>Click the Add a new row icon (+) within the Dependent/Beneficiaries section to add the new Dependent/Beneficiary ID.</p> 
<p>The page refreshes and the new row displays (Dependent/Beneficiary ID “02” in this scenario).</p> 	
	<p>For Life Events, the Effective Date field defaults to the date that the coverage will begin (in this scenario, a newborn dependent is being added based on a Birth event. Therefore, the Effective Date field defaults to the newborn’s date of birth (“6/21/2024” in this scenario)). Do not change this date as it must match the Event Date, or the system will not recognize this dependent as eligible for coverage.</p> <p>The Dependent/Beneficiary ID field will default to the next available Dependent/Beneficiary ID number (“02” in this scenario) and increment by 1 for each additional dependent subsequently added.</p>
67.	<p>Click the Edit Name button.</p> 



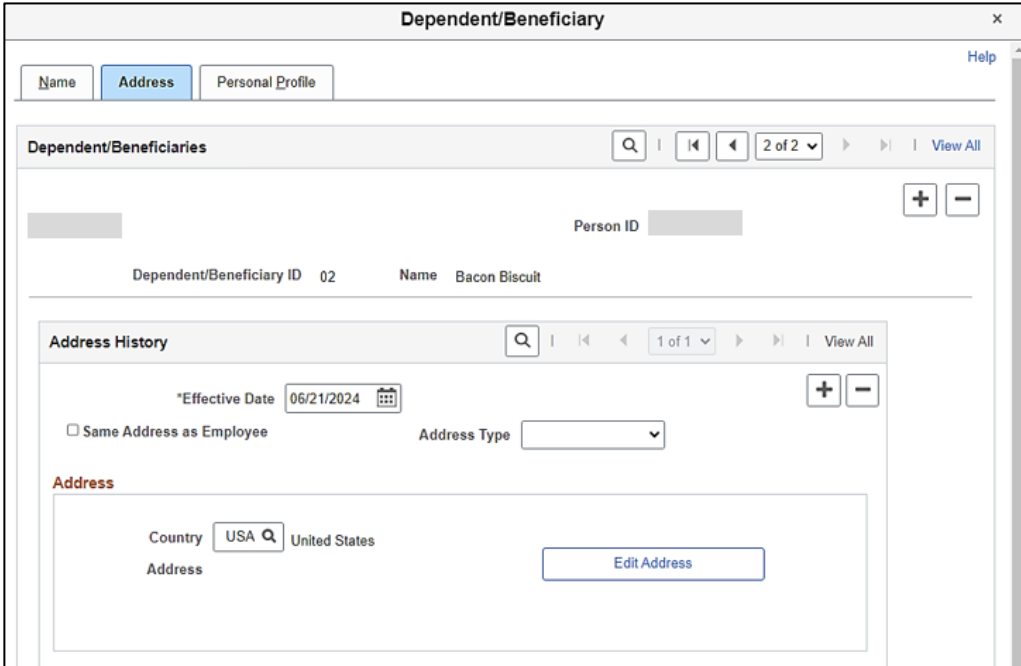


BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Name page displays in a pop-up window.</p> 
68.	<p>At a minimum, enter the dependent's first and last name in the corresponding fields. The Name Prefix, Middle Name, and Name Suffix fields are optional but should be entered as applicable.</p> <p>Note: Do not use accent marks or special characters in the name fields. These are not recognized and can cause errors when uploading to the Vendor.</p> 
69.	<p>Click the Refresh Name button.</p> 

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Step	Action
	<p>The Name page refreshes.</p> 
	<p>The Display Name, Formal Name, and Name fields will populate based on the name information entered.</p>
70.	<p>Click the OK button.</p> 
	<p>The Name tab redisplays.</p> 

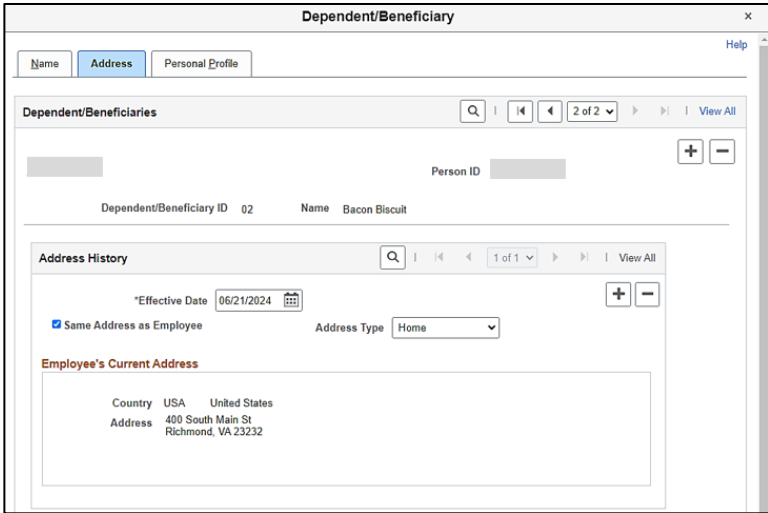

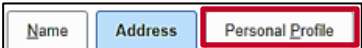
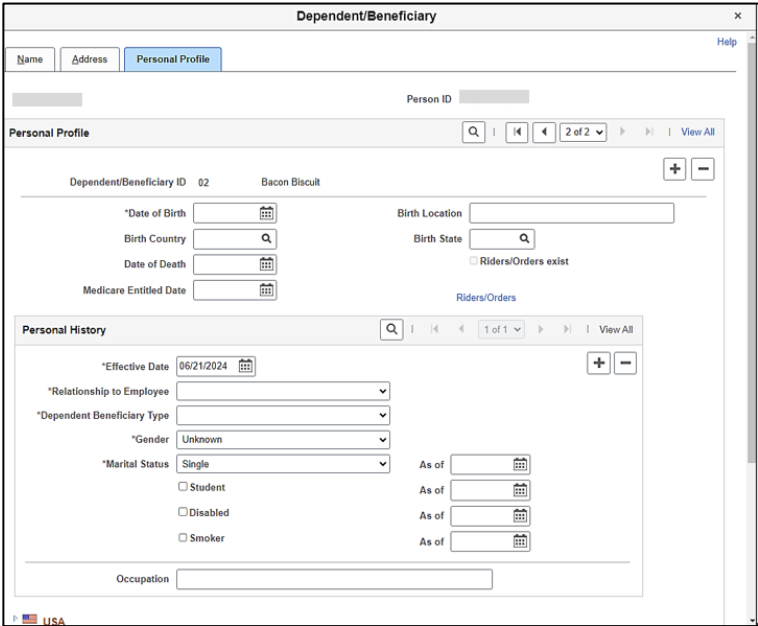
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Display Name field auto-populates with the name information previously entered.
71.	<p>Click the Address tab.</p> 
	<p>The Address tab displays.</p> 
72.	<p>Complete the address information as applicable for the dependent by clicking the Same Address as Employee checkbox option (applicable for this scenario).</p> 
	<p>Users can also complete the address information as applicable for the dependent by clicking the Address Type dropdown button and selecting the applicable Address Type, and then clicking the Edit Address button. The Edit Address page will display in a pop-up window, and the applicable address information can be entered.</p>











Benefits Job Aid


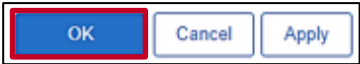
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Address tab refreshes.</p> 
	The address information auto-populates in the Employee's Current Address section.
73.	<p>Click the Personal Profile tab.</p> 
	<p>The Personal Profile tab displays.</p> 

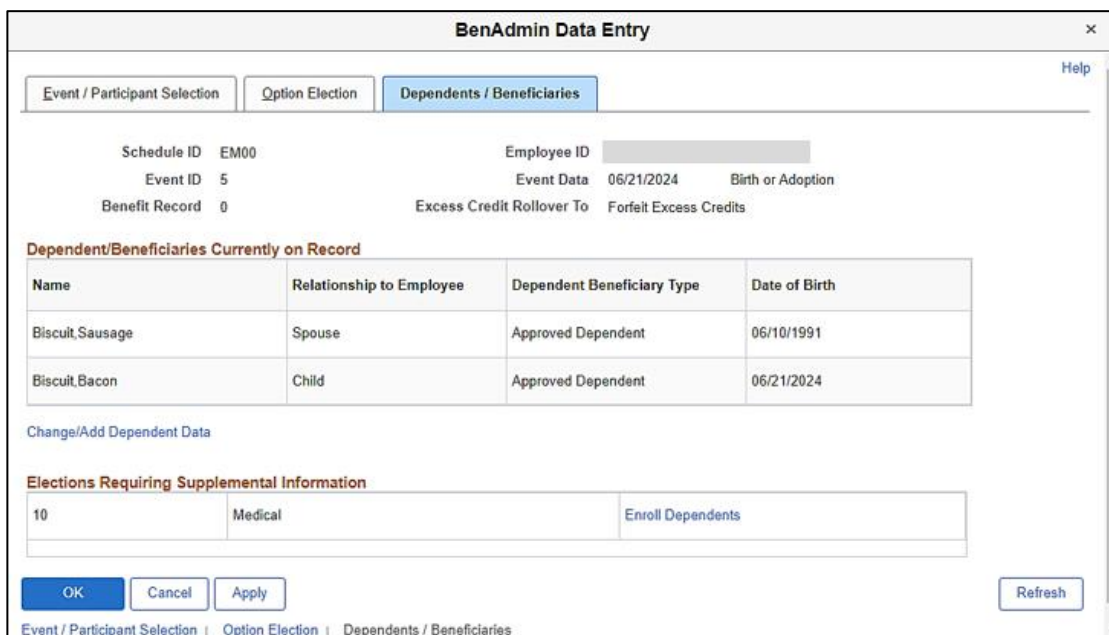
BN361 Creating and Completing a Life Event on Behalf of an Employee



Step	Action
	<p>The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields.</p> <p>The Student and Smoker checkbox options are not required in Cardinal, and this information is not transmitted to the Plan Provider (Vendor).</p>
74.	<p>Click the Date of Birth Calendar icon and select the dependent's date of birth.</p> 
75.	<p>Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee ("Child" in this example).</p> 
76.	<p>Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent".</p> 
	<p>"Approved Dependent" is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.</p>
77.	<p>Click the Gender dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Male" in this example).</p> 
77.	<p>The Marital Status field defaults to "Single". Do not update for this newborn dependent.</p> 
79.	<p>Click the vertical scrollbar to scroll down on the page to the National ID section.</p>
80.	<p>Enter the dependent's Social Security Number (SSN) in the National ID field.</p> 

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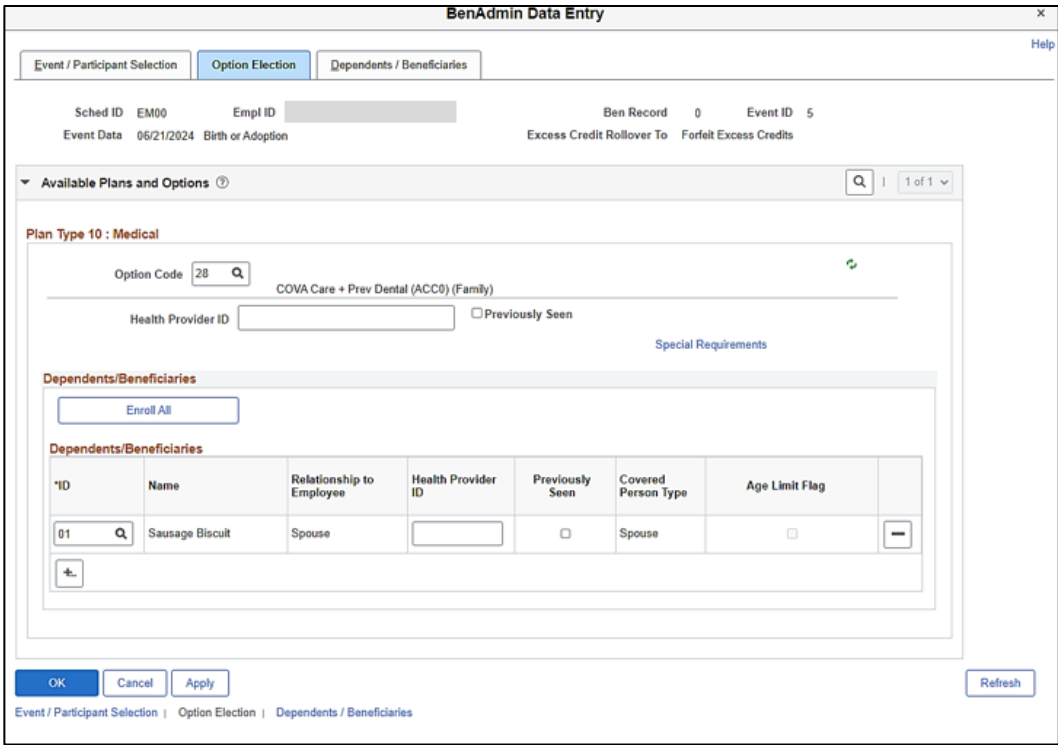


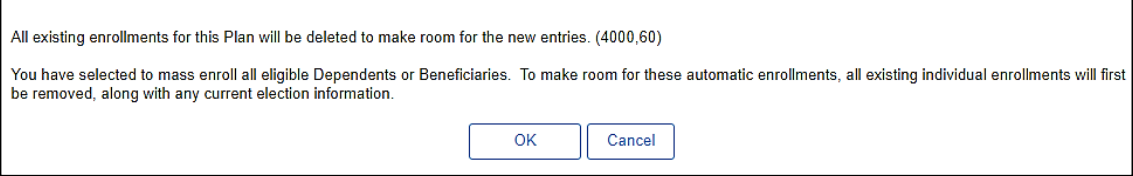
Step	Action
	<p>If the employee did not provide the dependent's SSN, or in the case of a newborn, the SSN has not been obtained yet, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event.</p> <p>Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.</p>
81.	<p>Click the OK button.</p> 

The **Dependents / Beneficiaries** tab redisplay.



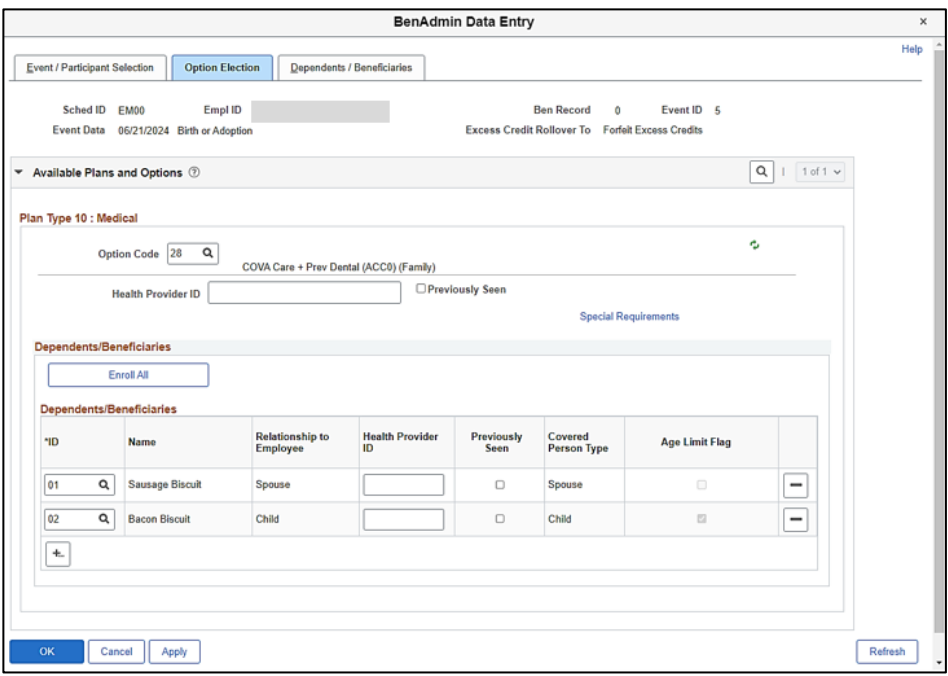




	<p>The dependent just added displays in the Dependent/Beneficiaries Currently on Record section.</p>
82.	<p>Click the Option Election tab.</p> 

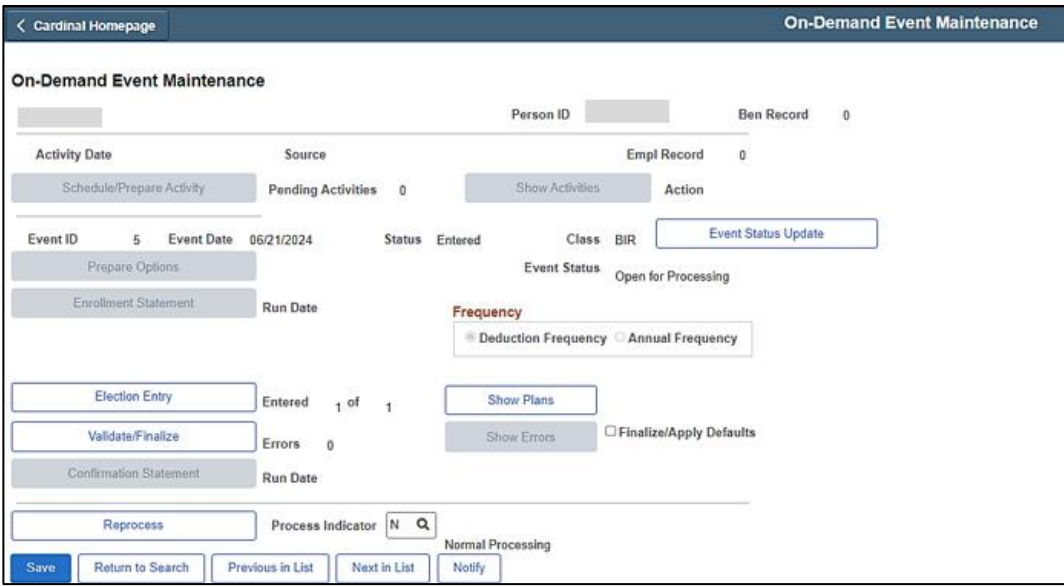




BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Option Election tab redispays.</p> 
83.	<p>Click the Enroll All button if all dependents will be enrolled (applicable for this scenario) to enroll the dependent(s) in the previously selected Medical Plan.</p> 
	<p>Users can also enroll the dependent(s) in the previously selected Medical Plan by adding the applicable dependents individually using the ID Look Up icon within the Dependents/Beneficiaries section.</p> <p>Additional rows can be added in this section by clicking the Add Multiple Rows icon (+...).</p>
	<p>A message displays in a pop-up window.</p> 

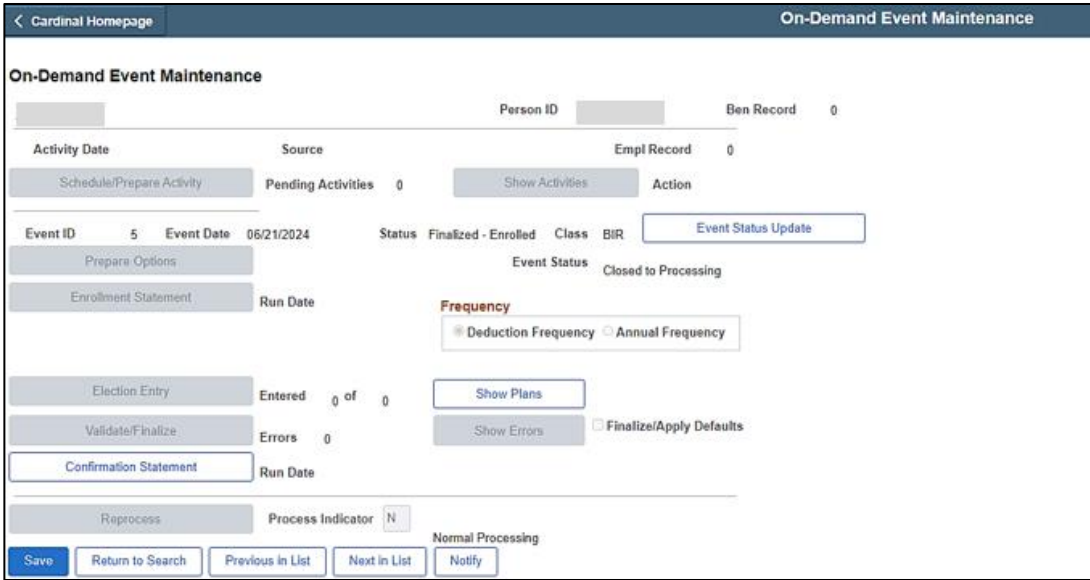



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Step	Action
	This is not an error message. It is just a message confirming that all dependents will be removed and then all eligible dependents will be enrolled.
84.	<p>Click the OK button.</p> 
<p>The Option Election tab redisplay.</p> 	
	The dependents enrolled display in the Dependents/Beneficiaries section. Validate for accuracy and ensure that all applicable dependents are listed.
85.	<p>Click the OK button.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.</p>
86.	<p>Click the Validate/Finalize button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.</p> 
	<p>A Confirmation message displays in a pop-up window once the process completes.</p> 
87.	<p>Click the OK button.</p> 

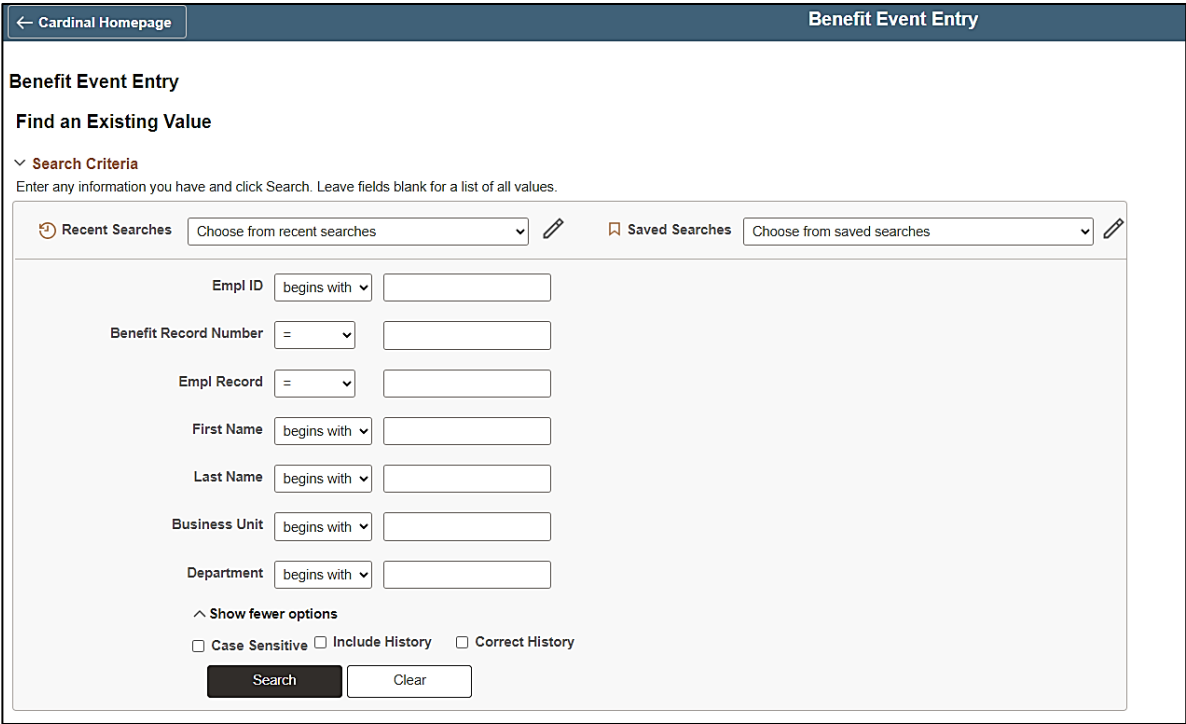



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.</p>
88.	<p>Click the Save button.</p> 
	<p>This Benefit Event to add the newborn dependent is now complete. Refer to the Viewing the Employee's Benefit Information section of this Job Aid for instructions on how to validate accuracy.</p> <p>Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee. This information will be transmitted to the Health Vendor in the evening interface file. If no other elections are being made by the employee, this process is complete. However, if any Flex Spending elections are being made (as in this scenario), continue with Step 89.</p> <p>Next, the Benefit Event must be created in order to enroll the employee in the Flex Spending Dependent Care plan.</p>
89.	<p>Navigate to the Benefit Event page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event</p>



Benefits Job Aid

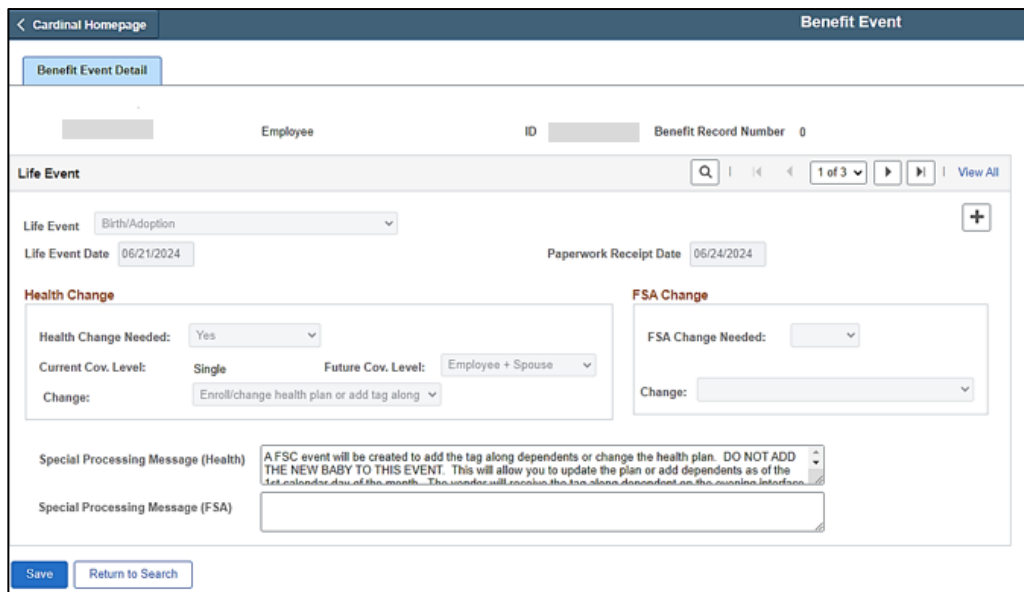
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Benefit Event Entry Find an Existing Value page displays.</p> <div></div>
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
90.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>The other search by options available (Search by dropdown button) are Business Unit, Department, and Name.</p> <div></div>
91.	<p>Click the Search button.</p> <div></div>

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **Benefit Event** page displays for the applicable employee.



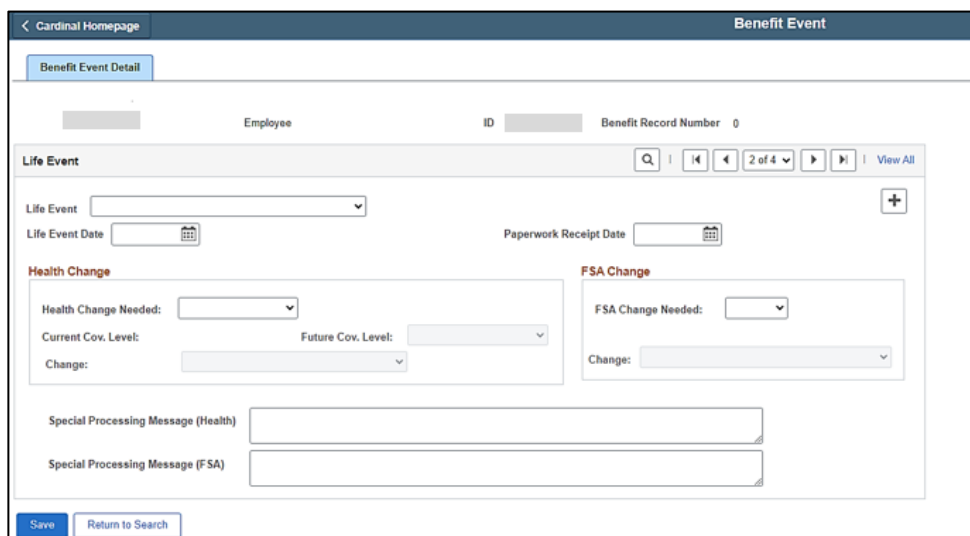

The **Benefit Event Entry** page displays with the information from any previously created Benefit Events for the employee.

92.


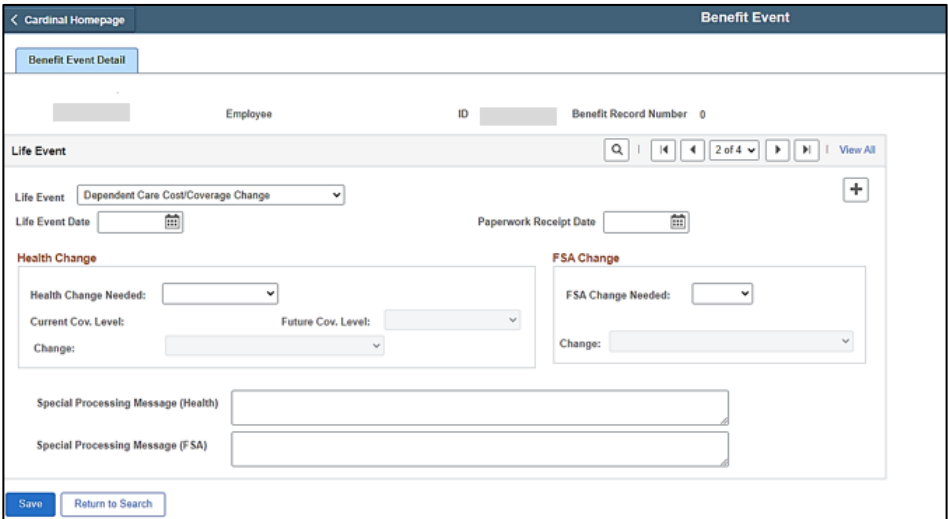




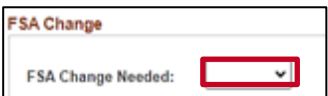
Click the **Add a new row** icon (+).



The page refreshes and the new row displays.



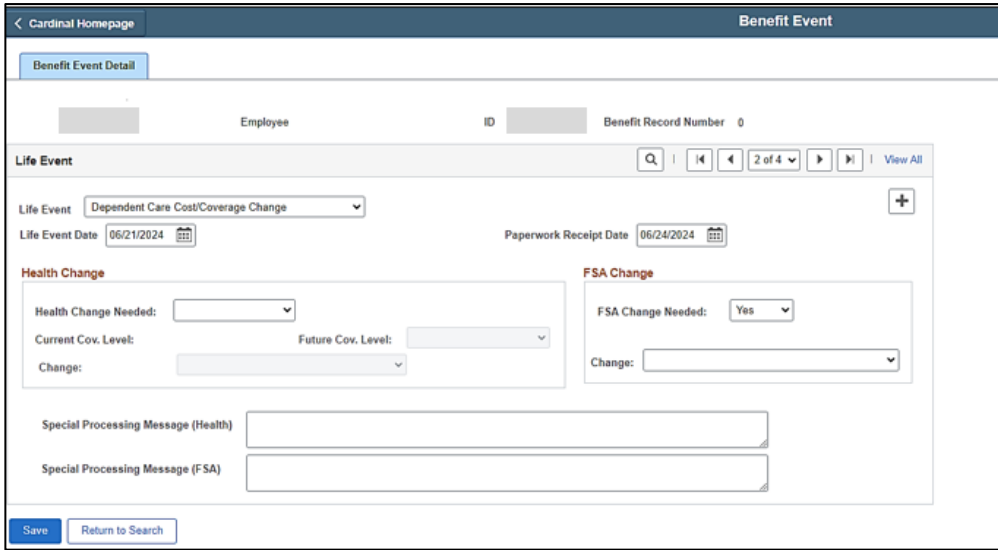


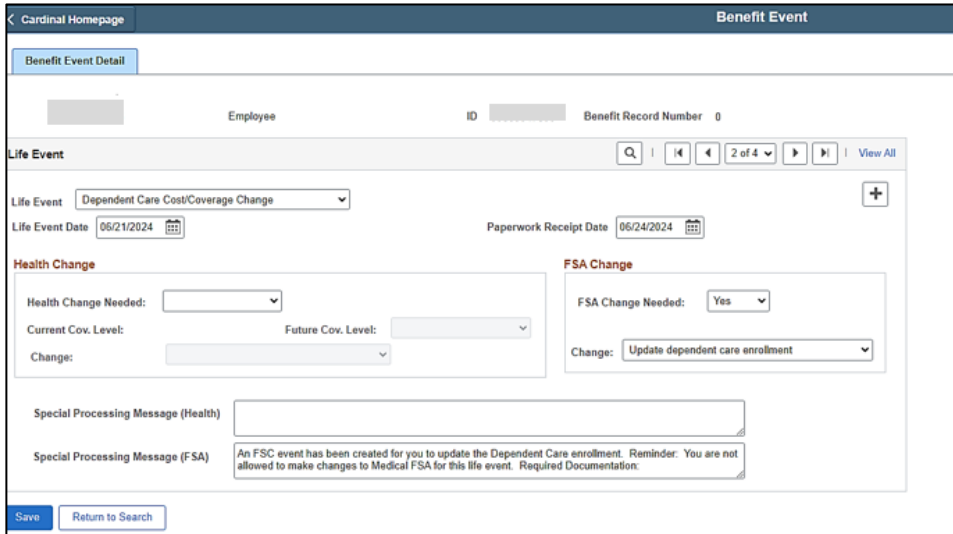
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
93.	<p>Click the Life Event dropdown button and select the applicable type of Life Event (Dependent Care Cost/Coverage Change in this scenario).</p> 
<p>The Benefit Event page redisplay with the selected Life Event.</p> 	
94.	<p>Click the Life Event Date Calendar icon and select the applicable date (“6/21/2024” in this scenario).</p> 
	<p>This is the date of birth for the newborn dependent as this is the Life Event which occurred that made the employee eligible for this enrollment change.</p>
95.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date (“6/24/2024” in this scenario).</p> 
	<p>This is the date that the Benefits Enrollment form was received from the employee.</p>
96.	<p>Click the FSA Change Needed dropdown button and select “Yes”.</p> 


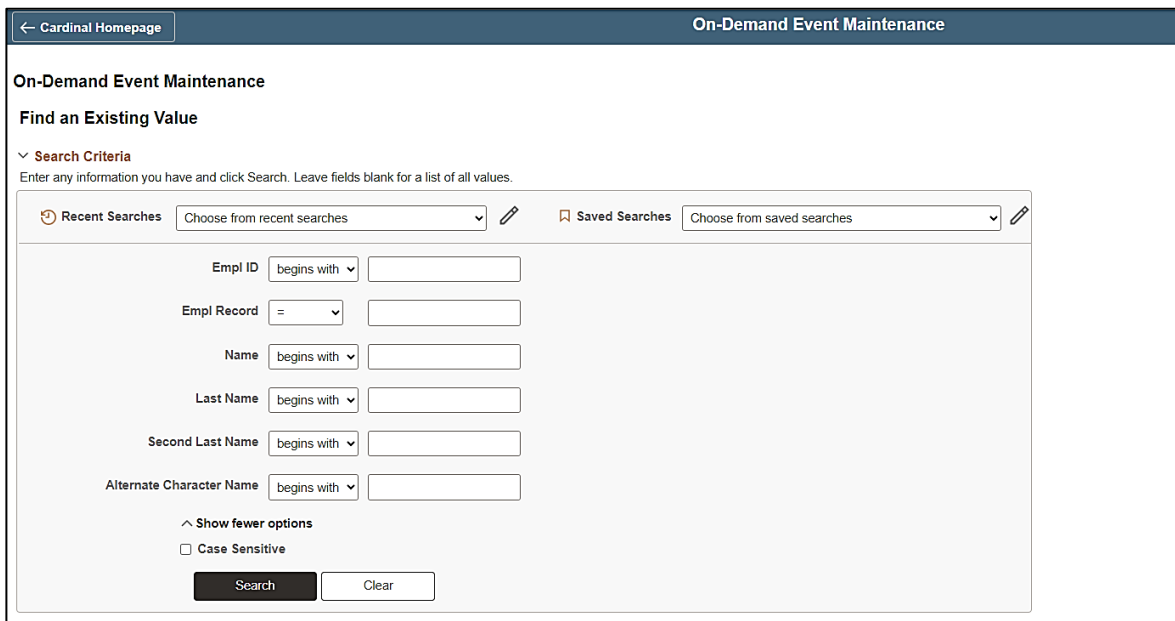



Benefits Job Aid



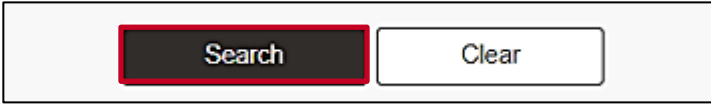
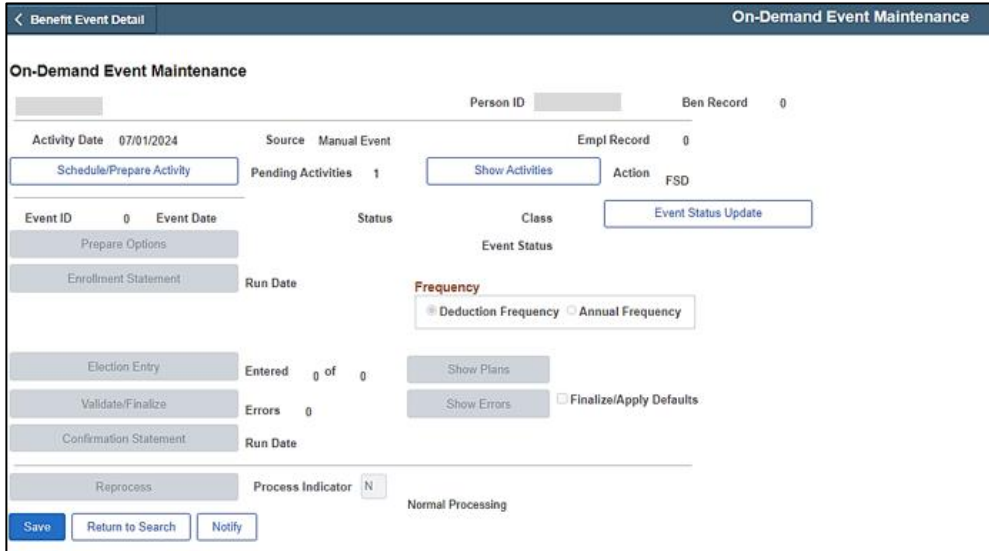


BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The page refreshes.</p> 
97.	<p>Click the Change dropdown button and select “Update dependent care enrollment”.</p> 
98.	<p>Click the Save button.</p> 
	<p>The page refreshes after the save action completes.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>In this scenario, an FSC Benefit Event has been created for the purpose of enrolling the employee in the Flex Spending Dependent Care plan. This Benefit Event has a coverage begin date of the first day of the following month ("7/1/2024" in this scenario).</p> <p>This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
99.	<p>Navigate to the On-Demand Event Maintenance page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>
<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> <div data-bbox="228 1012 1396 1629" data-label="Form">  </div>	
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>


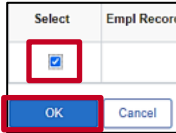
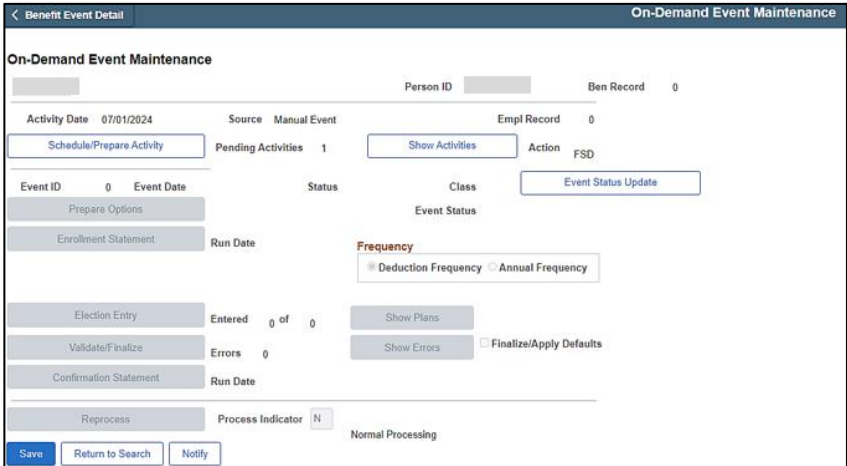

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
100.	<p>Enter the employee's Employee ID in the Empl ID field.</p> 
	<p>Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p>
101.	<p>Click the Search button.</p> 
<p>The On-Demand Event Maintenance page displays for the applicable employee.</p> 	
	<p>Review the Activity Date field. For Life Events, this date auto-populates based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to enroll the employee in the Flex Spending Dependent Care plan based on a Birth Life Event. Therefore, the Activity Date field defaults to the first day of the following month ("7/1/2024" in this scenario). Ensure that this date is accurate.</p> <p>The Source field will be "Manual Event". The Action field will default based on the type of Life Event ("FSD" in this scenario).</p>
102.	<p>Click the Show Activities button.</p> 

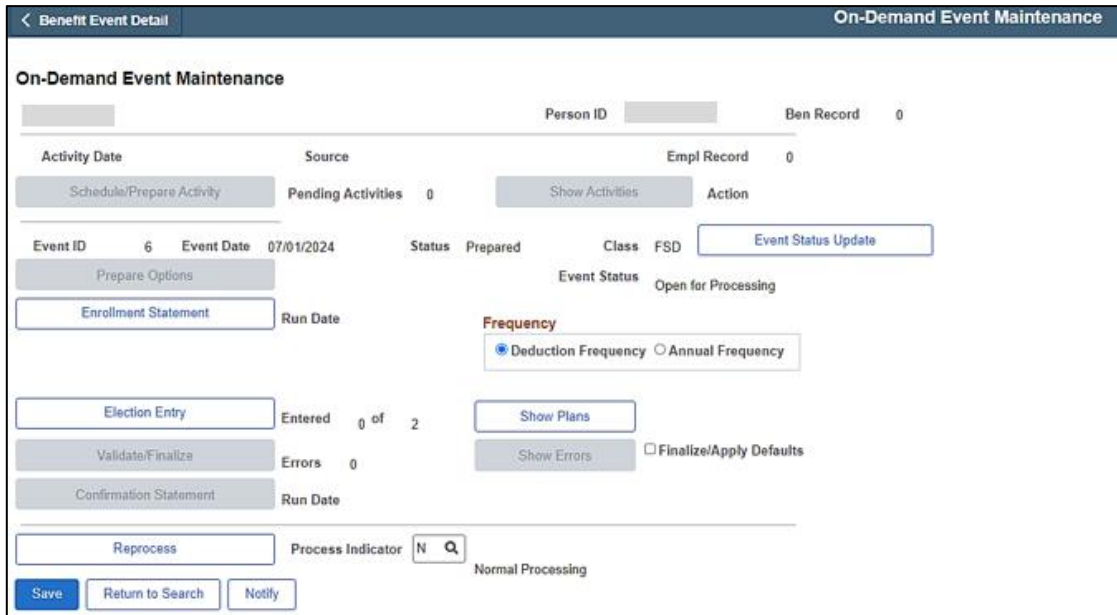



Benefits Job Aid


BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The BAS Activity page displays in a pop-up window.</p> 
103.	<p>Ensure that the Select checkbox option for the Benefit Event is selected and then click the OK button.</p> 
	<p>The On-Demand Event Maintenance page redispays.</p> 
104.	<p>If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a "0". In this case, proceed to Step 106.</p> <p>If the Pending Activities field displays a "1", click the Schedule/Prepare Activity button.</p> <p>Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity.</p> 

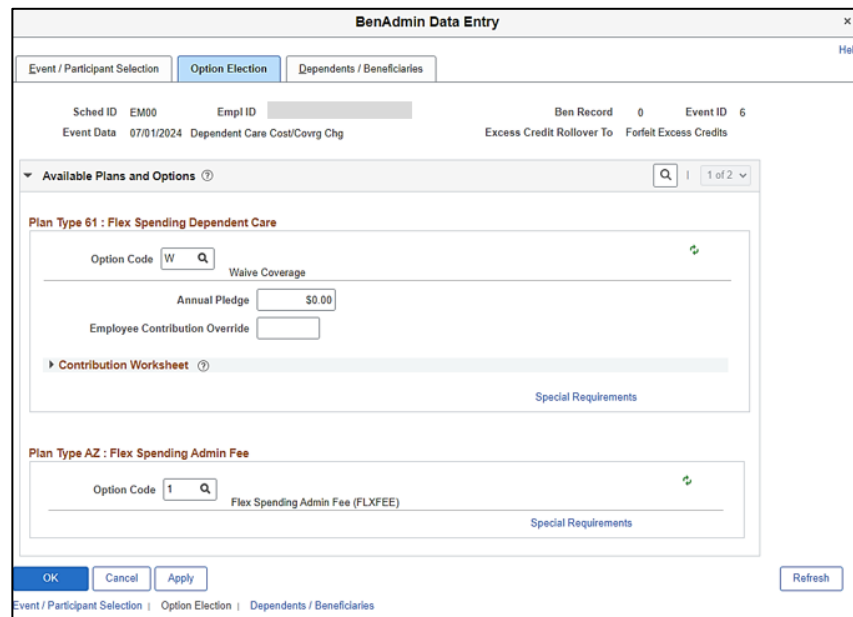
BN361 Creating and Completing a Life Event on Behalf of an Employee



Step	Action
	<p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <div data-bbox="477 417 1143 636"> <p>Process completed successfully. (3000,530)</p> <p>OK</p> </div>
105.	<p>Click the OK button.</p> <div data-bbox="282 722 498 800"> <p>OK</p> </div>
	<p>The On-Demand Event Maintenance page redisplay.</p> <div data-bbox="240 882 1351 1493">  </div>
	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p> <div data-bbox="282 1625 721 1711"> <p>Status Prepared Class FSD Event Status Open for Processing</p> </div> <p>If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line.</p>

BN361 Creating and Completing a Life Event on Behalf of an Employee

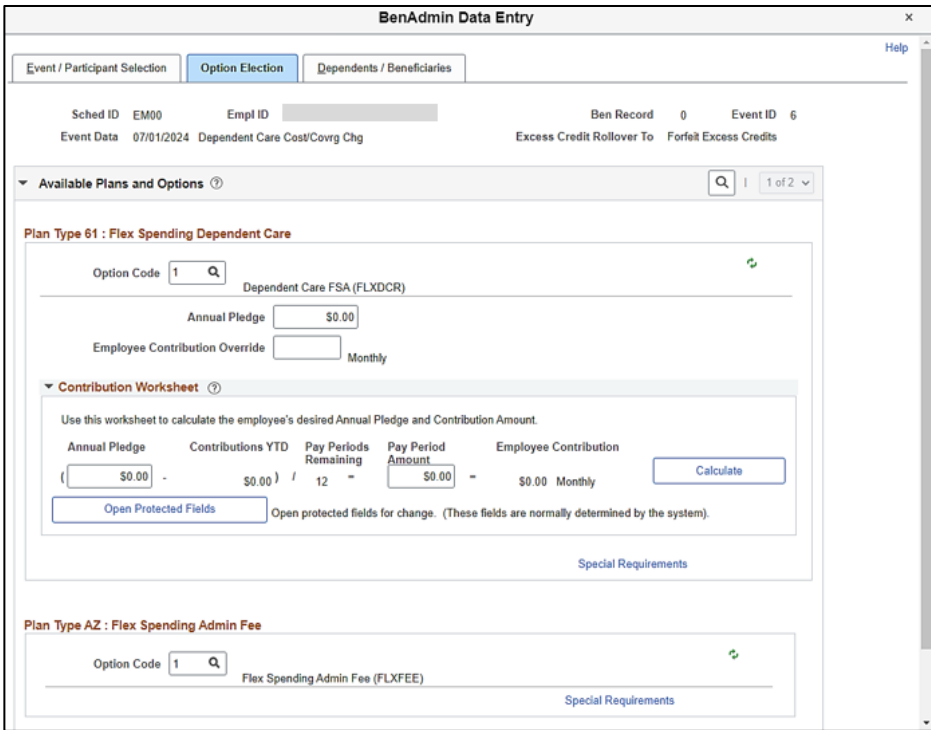


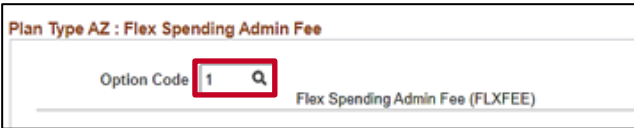

Step	Action
106.	Click the Election Entry button. 

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.

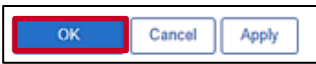
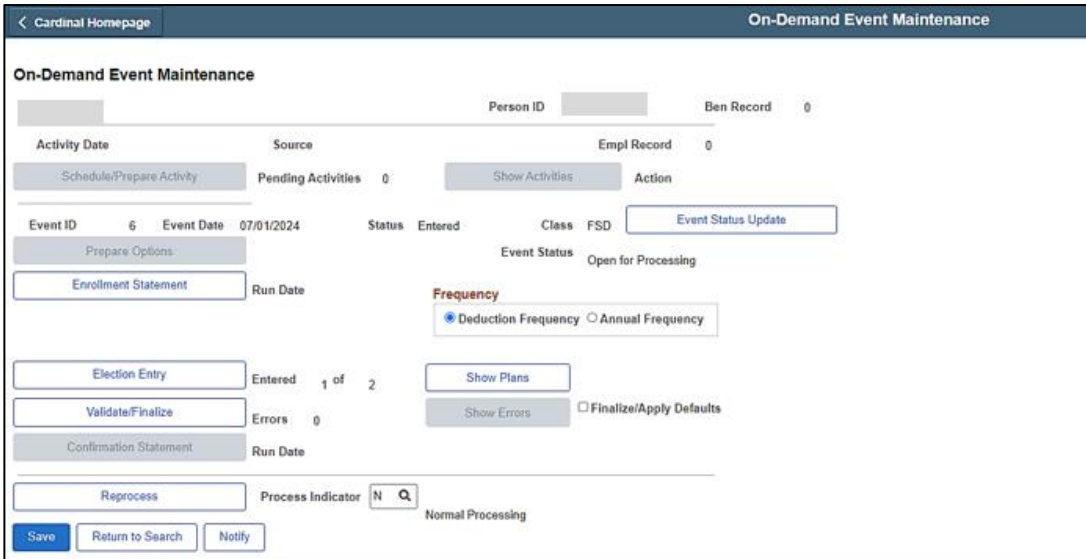






	Based on the manual event created, only the Plan Type 61: Flex Spending Dependent Care and Plan Type AZ: Flex Spending Admin Fee sections display.
107.	Click the Option Code Look Up icon (magnifying glass) within the Plan Type 61: Flex Spending Dependent Care section and select the applicable coverage code (Option Code 1). 

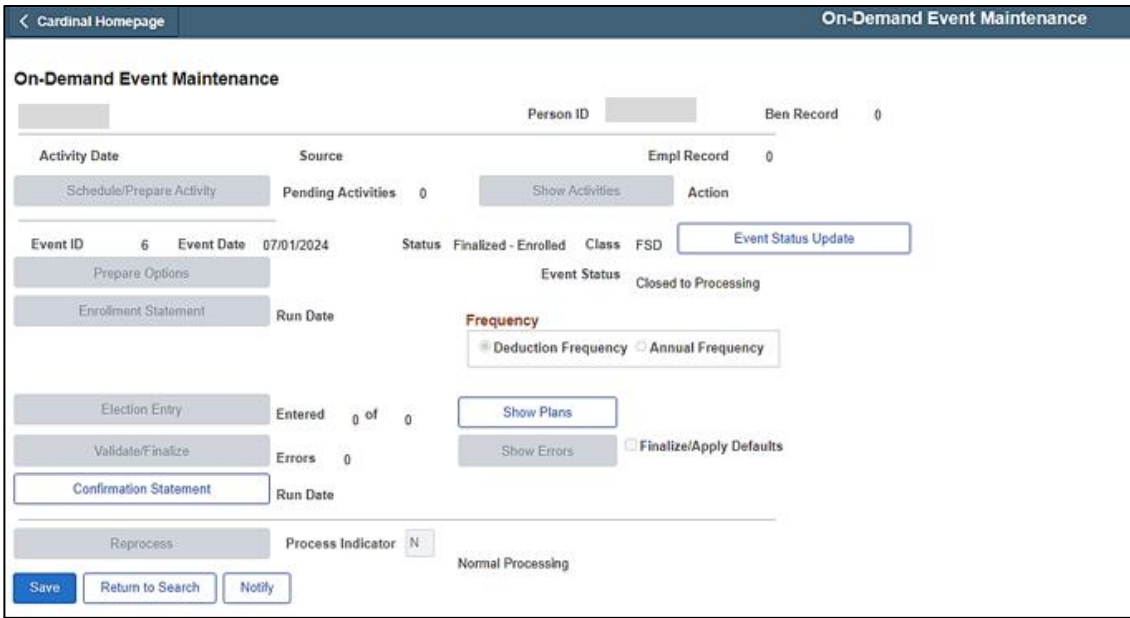

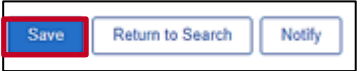

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The page refreshes based on the selection.</p> 
108.	<p>Enter the applicable amount in the Annual Pledge field based on the employee's Benefit Enrollment form ("1,000.00" in this scenario).</p> 
	<p>The fields within the Contribution Worksheet section can also be used to calculate the annual pledge amount if the employee provided a per Pay Period amount.</p>
109.	<p>Complete the Plan Type AZ: Flex Spending Admin Fee section as needed.</p> 
	<p>If the employee is enrolled in one or more Flex Spending Accounts (Flex Spending Medical or Flex Spending Dependent Care plan), the employee must be enrolled in the Flex Spending Admin Fee (Option Code 1).</p> <p>In this scenario, the employee was already enrolled in the Flex Spending Medical plan and therefore, is already enrolled in the Flex Spending Admin Fee.</p>

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
110.	<p>Once complete, click the OK button.</p> 
<p>The On-Demand Event Maintenance page redispays.</p> 	
	<p>Note: The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.</p>
111.	<p>Click the Validate/Finalize button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.</p> 
<p>A Confirmation message displays in a pop-up window once the process completes.</p> 	
112.	<p>Click the OK button.</p> 

BN361 Creating and Completing a Life Event on Behalf of an Employee


Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.</p>
113.	<p>Click the Save button.</p> 
	<p>This Benefit Event to add the Flex Spending Dependent Care plan is now complete. Refer to the Viewing the Employee's Benefit Information section of this Job Aid for instructions on how to validate accuracy.</p> <p>Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee.</p>



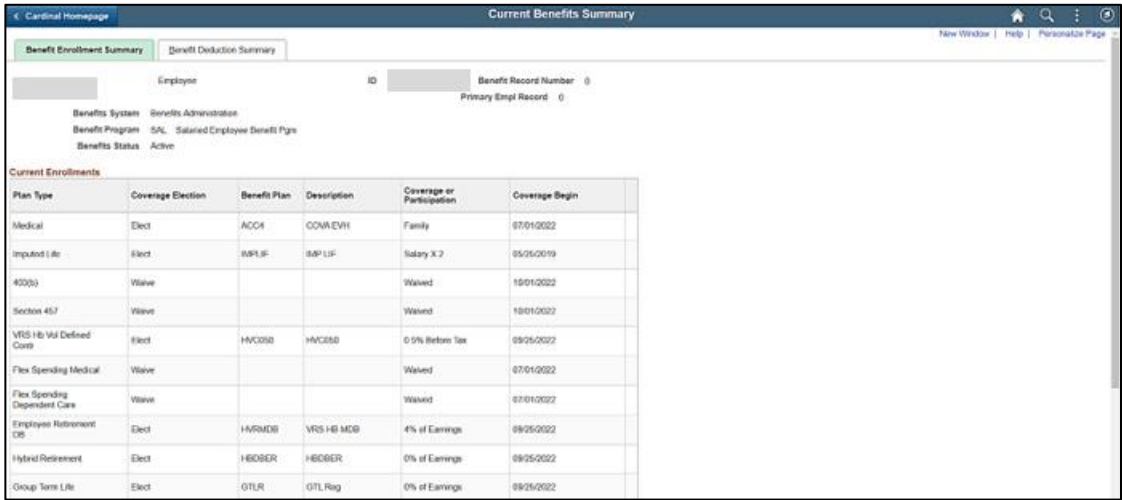

BN361 Creating and Completing a Life Event on Behalf of an Employee

Viewing the Employee's Benefits Information

After completing a manual Benefit Event, the Benefits Administrator should view the employee's benefits information to ensure accuracy. This can be completed at any point after the Benefit Event has been finalized.

Step	Action
1.	<p>Navigate to the Current Benefits Summary page using the following path: NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary</p> <p>The Current Benefits Summary Find an Existing Value page displays.</p> <div data-bbox="238 693 1385 1474"></div>
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> <div data-bbox="254 1782 725 1845"></div>

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
3.	<p>Click the Search button.</p> <div> <input type="button" value="Search"/> <input type="button" value="Clear"/> </div>
<p>The Current Benefits Summary page displays for the applicable employee with the Benefit Enrollment Summary tab displayed by default.</p> 	
	<p>Review the information within the Current Enrollments section and reconcile against the benefits enrollment form submitted by the employee to ensure accuracy.</p> <p>If any data entry errors are identified, refer to the Job Aid titled BN361 Re-opening and Reprocessing a Benefit Event. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
4.	<p>Click the Benefit Deduction Summary tab.</p> <div> <input type="button" value="Benefit Enrollment Summary"/> <input type="button" value="Benefit Deduction Summary"/> </div>

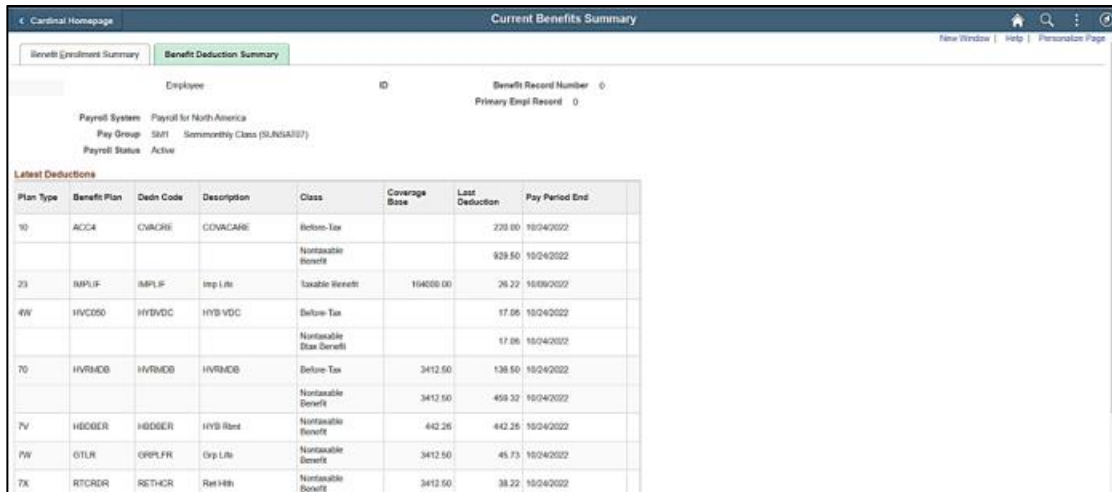


Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **Benefit Deduction Summary** tab displays.



Current Benefits Summary

Employee ID: [blank] Benefit Record Number: 0
Primary Empl Record: 0

Payroll System: Payroll for North America
Pay Group: SM1 Semi-monthly Class (SUNDA337)
Payroll Status: Active

Latest Deductions

Plan Type	Benefit Plan	Debn Code	Description	Class	Coverage Base	Last Deduction	Pay Period End
10	ACCA	CONCARE	CONCARE	Before-Tax		239.00	10/24/2022
				Non-taxable Benefit		929.50	10/24/2022
23	IMPLIF	IMPLIF	Imp Life	Insurable Benefit	164000.00	26.22	10/24/2022
4W	HVCDS0	HYBVDC	HYB VDC	Before-Tax		17.06	10/24/2022
				Non-taxable (Plan Benefit)		17.06	10/24/2022
70	HVRM00	HVRM00	HVRM00	Before-Tax	3412.50	138.50	10/24/2022
				Non-taxable Benefit	3412.50	459.32	10/24/2022
7V	HDDER	HDDER	HYB Hdb	Non-taxable Benefit	442.26	442.26	10/24/2022
7W	OTLIR	ORPLFR	Org Life	Non-taxable Benefit	3412.50	45.73	10/24/2022
7X	RTCHCR	RETHCR	Ret Hdb	Non-taxable Benefit	3412.50	38.22	10/24/2022

Review the employee's pay group, payroll status, and deductions information to ensure accuracy. If any issues are identified, coordinate corrective action with an Agency HR Administrator and/or an Agency Payroll Administrator.



BN361 Creating and Completing a Life Event on Behalf of an Employee

Viewing/Printing a Confirmation Statement

After completing the benefits enrollment change, the employee should receive an email with their Confirmation Statement after the next Benefits Administration process runs. However, if the employee does not have an email defined in Cardinal yet, or did not receive the email, the Agency BA can follow the steps in this section to view and print a Confirmation Statement for the employee.

Step	Action
1.	Navigate to the Review Employee Statements page using the following path: Benefits Administrator Tile > Review Employee Benefits > Review Employee Statements

The **Review Employee Statements Search** page displays.

2. Enter the employee's Employee ID in the **Empl ID** field.
Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.


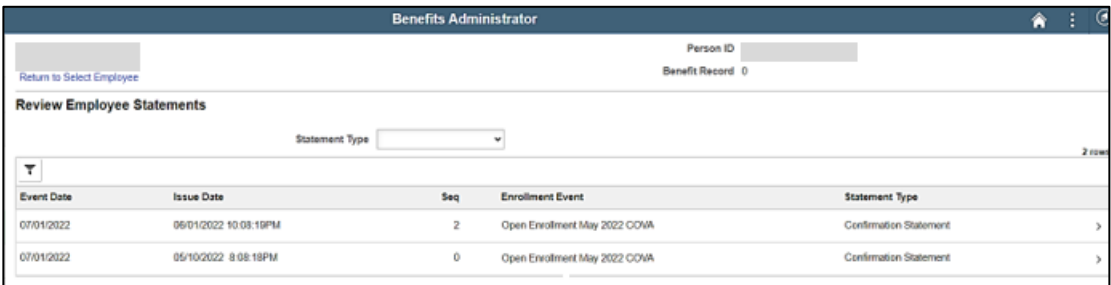

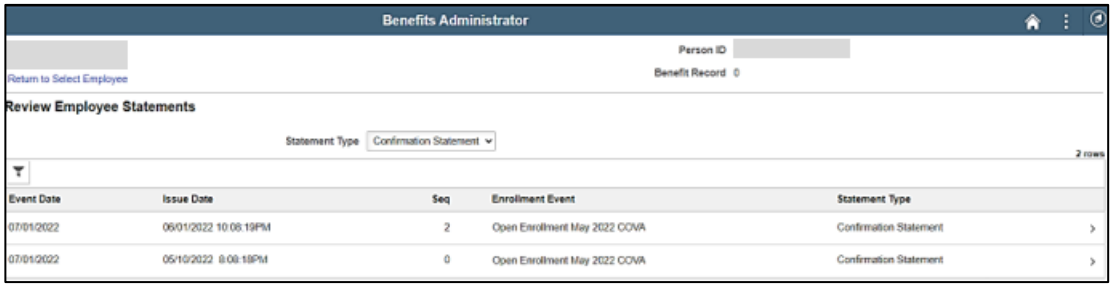
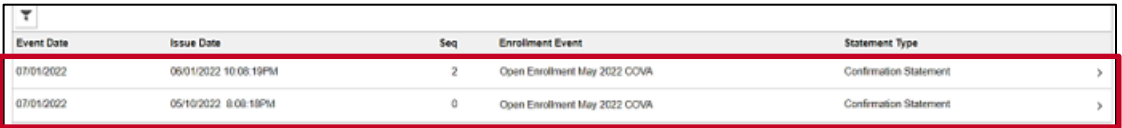
3. Click the **Search** button.

The page refreshes with the search results displayed in the **Select Employees** section.



Benefits Job Aid

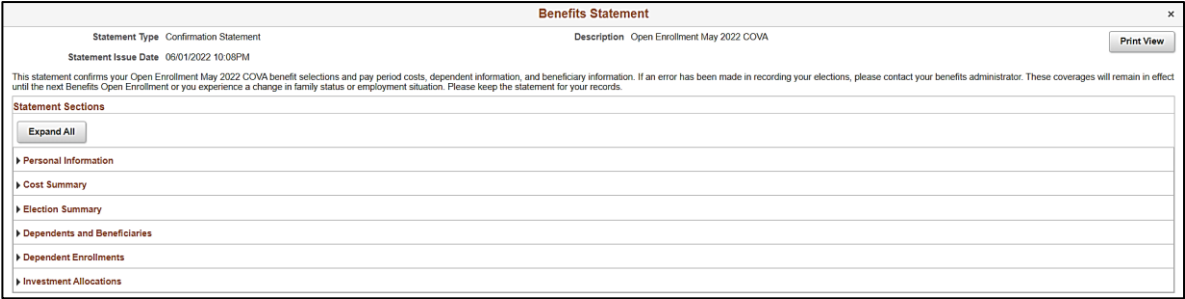

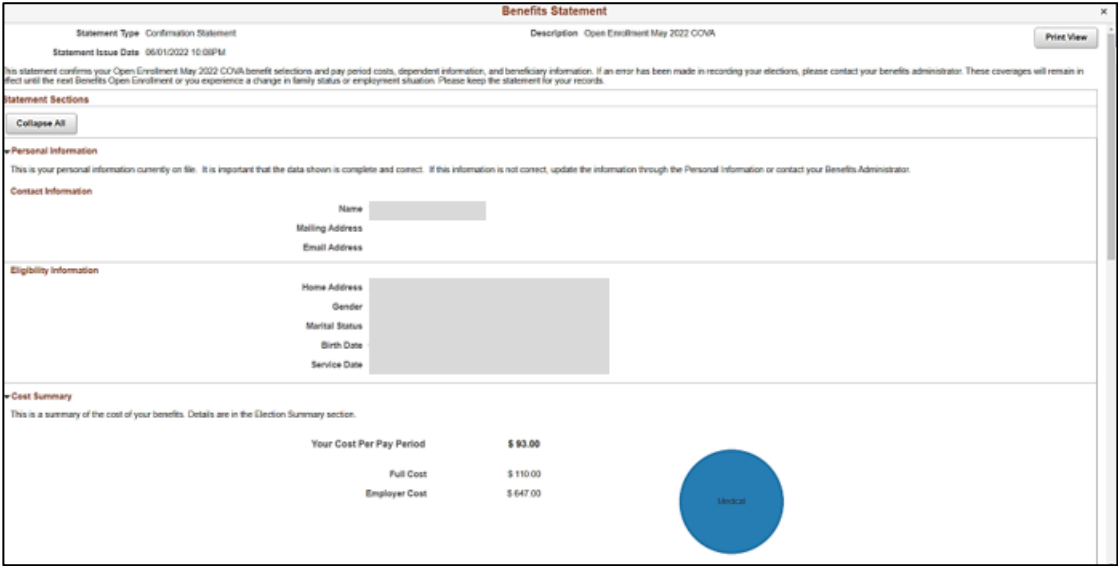
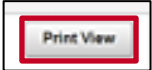
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
4.	<p>Click anywhere in the corresponding row for the employee within the Select Employees section.</p> 
<p>The Review Employee Statements page displays for the selected employee.</p> 	
5.	<p>Click the Statement Type dropdown button and select "Confirmation Statement".</p> 
<p>The page refreshes.</p> 	
6.	<p>Click anywhere in the corresponding row for the applicable Benefit Event (Open Enrollment May 2022 COVA (Seq Number 2) will be opened in this example).</p> 



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	<p>The Benefits Statement page displays for the applicable Benefit Event.</p> 
7.	<p>Click the Expand All button to view the detailed information.</p> 
	<p>The page refreshes with the sections expanded.</p> 
8.	<p>Review the information as needed. Use the vertical scrollbar to scroll down and view all of the information.</p>
9.	<p>Click the Print View button.</p> 



Step	Action
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Note: If the Confirmation Statement does not display, the user may need to allow pop-ups from the website.

10. Save and/or print the document as needed.