

Managing and Approving Dependents Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator to generate the Dependent Waiting Approval Benefits Eligibility Audit Report. This report should be generated and reviewed on a regular basis in order to monitor those dependents that are currently in an “Unapproved Dependent” status. Unapproved dependents are not covered under the employee’s selected plan coverage and must be updated to a status of “Approved Dependent” once the applicable supporting documentation is provided by the employee. Use this report to review these dependents pending approval and to follow up with the employee to ensure that the supporting documentation is provided within the established timeframe.

This Job Aid also provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to re-open and reprocess a Benefit Event after the Benefit Event was validated and finalized. Re-opening a Benefit Event may be required in any of the following circumstances:

- Additional dependents need to be enrolled
- Additional enrollments need to be completed
- Updates or corrections to the enrollments or dependents information are needed
- Dependents need to be updated from “Unapproved Dependent” to “Approved Dependent” when the required supporting documentation is provided by the employee

Benefit Events should only be re-opened within their original enrollment window. Request permission from the Office of Health Benefits (OHB) prior to re-opening a Benefit Event outside of the original enrollment window.

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



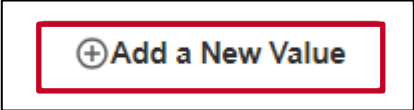
Revision Date	Summary of Changes
1/26/2026	New section added to Job Aid - Managing Dependent Personal Information .
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1; Section 2 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



Running the Dependent Waiting Approval Benefits Eligibility Audit Report



Step	Action
1.	Navigate to the (page or report) using the following path: NavBar > Menu > Benefits > Reports > Audits > Benefit Eligibility Audits

The **Benefit Eligibility Audits Search** page displays.

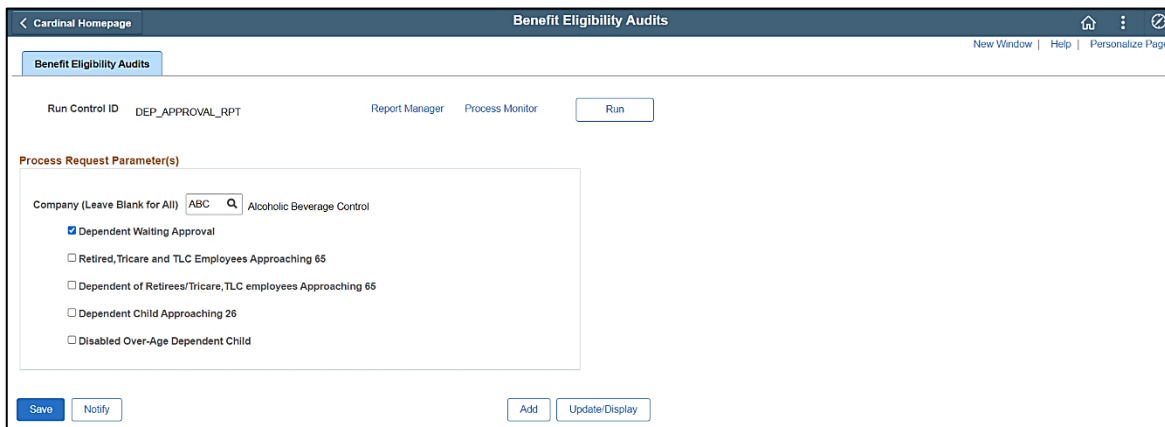
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal website in Job Aids under Learning .
	If this is not the first time generating this report, always search for and use an existing Run Control ID before creating a new one. Users cannot delete Run Control IDs once they are created and saved. The instructions provided in Steps 2-4 assume that this is the first time that this report is being generated.
2.	Click the Add a New Value button. 

The **Add a New Value** page displays.



Step	Action
3.	<p>Enter a Run Control ID in the Run Control ID field based on the following guidelines:</p> <ul style="list-style-type: none">a. The Run Control ID must be unique and should be descriptive enough to help locate for future useb. Up to 30 characters are allowedc. No blank spaces can be used; however, an underscore can be used in lieu of spacesd. Do not use wildcard symbols (%) 
4.	<p>Click the Add button.</p> 

The **Benefits Eligibility Audits** page displays.



5.	<p>Select the applicable Company using the Company Look Up icon.</p> 
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Step	Action
6.	<p>Click the Dependent Waiting Approval checkbox option.</p> <div><p>Process Request Parameter(s)</p><p>Company (Leave Blank for All) <input type="text" value="ABC"/> <input type="button" value="Q"/> Alcoholic Beverage Control</p><p><input checked="" type="checkbox"/> Dependent Waiting Approval</p><p><input type="checkbox"/> Retired, Tricare and TLC Employees Approaching 65</p><p><input type="checkbox"/> Dependent of Retirees/Tricare, TLC employees Approaching 65</p><p><input type="checkbox"/> Dependent Child Approaching 26</p><p><input type="checkbox"/> Disabled Over-Age Dependent Child</p></div>
7.	<p>Click the Save button.</p> <div><input type="button" value="Save"/> <input type="button" value="Notify"/></div>
8.	<p>Click the Run button.</p> <div><p>Benefit Eligibility Audits</p><p>Run Control ID DEP_APPROVAL_RPT Report Manager Process Monitor <input type="button" value="Run"/></p></div>

The **Process Scheduler Request** page displays.

Process Scheduler Request

User ID V_TRN_BN36102 Run Control ID DEP_APPROVAL_RPT

Server Name Run Date 04/22/2024

Recurrence Run Time 10:43:05AM

Time Zone

Process List

Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Benefit Eligibility Audits	V_BN301_RPT	Application Engine	Web	PDF	Distribution

9.


The **Type** field defaults to “Web”. Update to “Email”, “File”, or “Printer” as desired. If “Email” is selected, use the **Distribution** link to identify the email address to send the report.

Process List

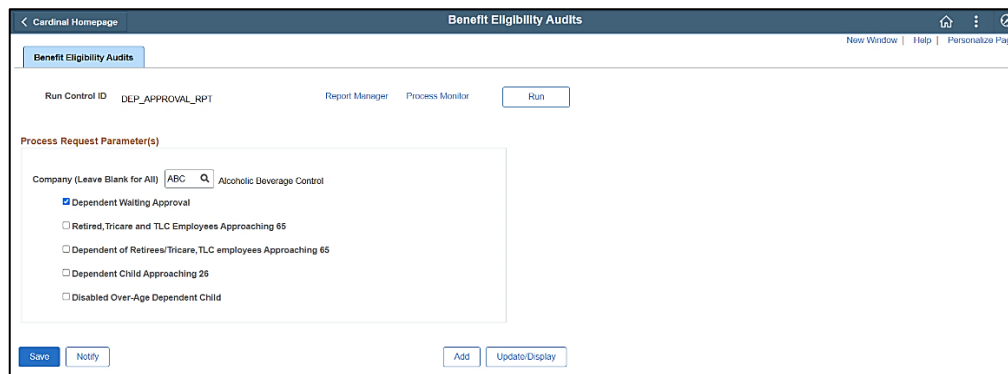
Select	Description	Process Name	Process Type	Type	Format	Distribution
<input checked="" type="checkbox"/>	Benefit Eligibility Audits	V_BN301_RPT	Application Engine	Web	PDF	Distribution



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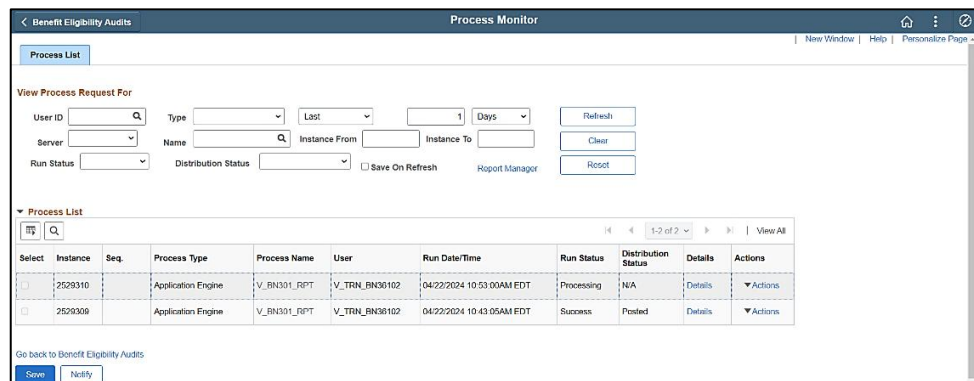
Step	Action														
10.	<p>The Format field defaults based on the report being generated. Update as needed if other formats are available for the report being generated.</p> <div><p>Process List</p><table><tr><th>Select</th><th>Description</th><th>Process Name</th><th>Process Type</th><th>Type</th><th>Format</th><th>Distribution</th></tr><tr><td><input checked="" type="checkbox"/></td><td>Benefit Eligibility Audits</td><td>V_BN301_RPT</td><td>Application Engine</td><td>Web</td><td>PDF</td><td>Distribution</td></tr></table></div>	Select	Description	Process Name	Process Type	Type	Format	Distribution	<input checked="" type="checkbox"/>	Benefit Eligibility Audits	V_BN301_RPT	Application Engine	Web	PDF	Distribution
Select	Description	Process Name	Process Type	Type	Format	Distribution									
<input checked="" type="checkbox"/>	Benefit Eligibility Audits	V_BN301_RPT	Application Engine	Web	PDF	Distribution									
	Refer to the HCM Reports Catalogs to identify the formats available for each specific HCM Report. The HCM Reports Catalogs are located on the Cardinal website under Resources .														
11.	<p>Click the OK button.</p> <div><div>OK</div><div>Cancel</div></div>														

The **Benefit Eligibility Audits** page redisplays.



12.	<p>Click the Process Monitor link.</p> <div><p>Benefit Eligibility Audits</p><p>Run Control ID DEP_APPROVAL_RPT Report Manager Process Monitor Run</p></div>
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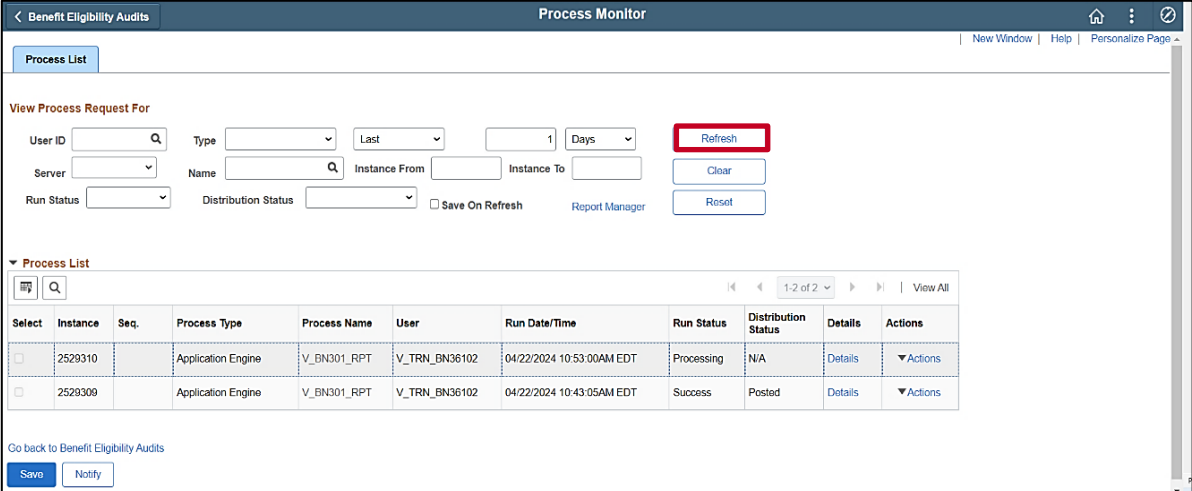
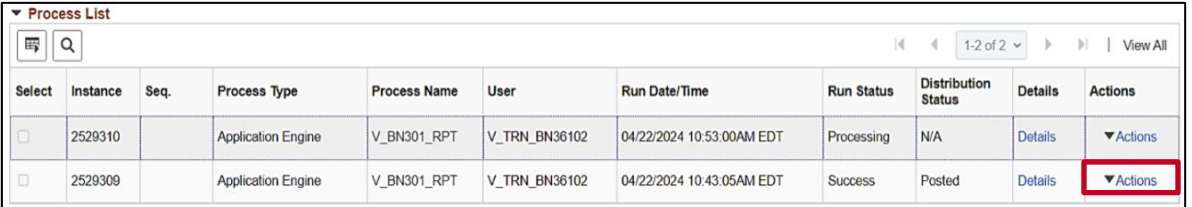
The **Process Monitor** page displays.



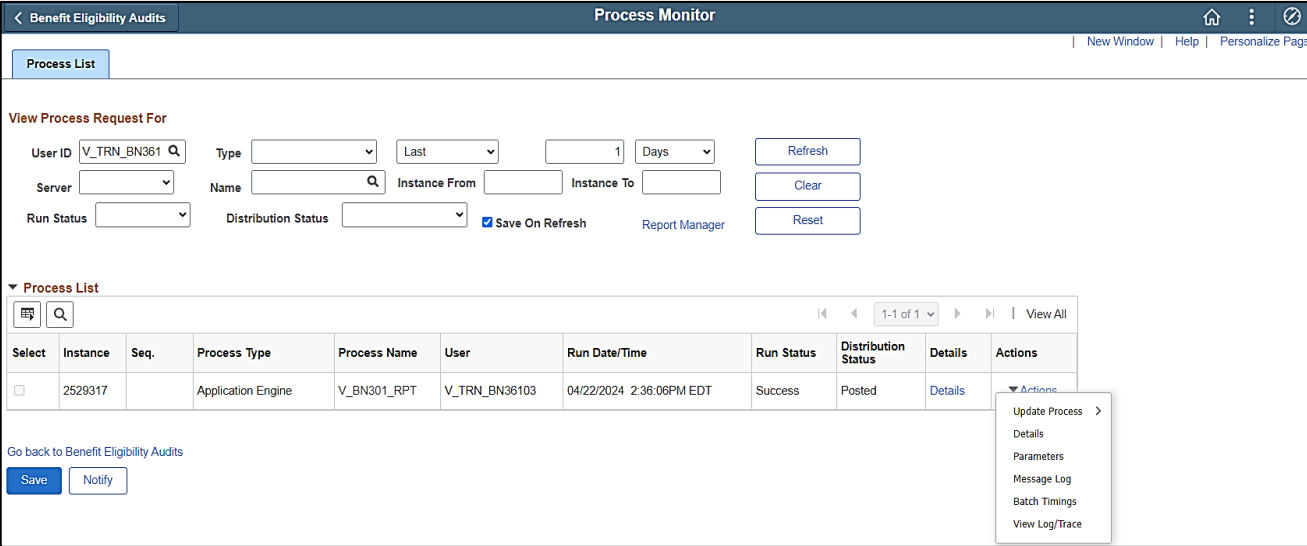


Benefits Job Aid

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Step	Action
13.	<p>Click the Refresh button periodically until the Run Status is “Success” and the Distribution Status is “Posted”.</p>  <p>The screenshot shows the 'Process Monitor' window with the 'Process List' tab selected. The 'View Process Request For' section has search filters for User ID, Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. The 'Refresh' button is highlighted with a red box. Below the search filters is a table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, Details, and Actions. The table contains two rows of data. The first row has a 'Processing' status and 'N/A' for Distribution Status. The second row has a 'Success' status and 'Posted' for Distribution Status. The 'Actions' column for the second row is highlighted with a red box.</p>
14.	<p>Click the Actions dropdown button.</p>  <p>The screenshot shows the 'Process List' table from the previous step. The 'Actions' dropdown button for the second row is highlighted with a red box. The dropdown menu is open, showing options: Update Process, Details, Parameters, Message Log, Batch Timings, and View Log/Trace.</p>

The **Actions** dropdown menu displays.



The screenshot shows the 'Process Monitor' window with the 'Process List' tab selected. The 'View Process Request For' section has search filters for User ID, Type, Last, Days, Server, Name, Instance From, Instance To, Run Status, and Distribution Status. The 'Refresh' button is highlighted with a red box. Below the search filters is a table with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, Details, and Actions. The table contains one row of data. The first row has a 'Success' status and 'Posted' for Distribution Status. The 'Actions' column for the first row is highlighted with a red box. The dropdown menu is open, showing options: Update Process, Details, Parameters, Message Log, Batch Timings, and View Log/Trace.



Step	Action																																																																																																		
The Dependent Waiting Approval Benefits Eligibility Audit report displays.																																																																																																			
<table><tr><th colspan="20">Dependent Waiting Approval</th></tr><tr><th>Company</th><th>Employee ID</th><th>Ben Reason</th><th>Last Name</th><th>First Name</th><th>Middle Name</th><th>Dependent ID</th><th>Dep Last</th><th>Dep First</th><th>Dep Middle</th><th>DOB DOB</th><th>Acute/Chronic</th><th>Effective Date</th><th>Disabled As of Date</th><th>Medicare Date</th><th>Address 1</th><th>Address 2</th><th>City</th><th>State</th><th>Postal</th><th>Email Address</th><th>Email Type</th><th>Benefit Group</th><th>Unit</th><th>Dept ID</th><th>Audit Reason</th></tr><tr><td>ABC</td><td>0000000000</td><td>D</td><td>Jaysa</td><td>Jager</td><td></td><td>01</td><td>Jaysa</td><td>Jager</td><td></td><td>01/01/1999</td><td>01</td><td>01/01/2004</td><td></td><td></td><td>200 Main Street</td><td></td><td>Richmond</td><td>VA</td><td>23218</td><td>jeemai@virginia.gov</td><td>000001000</td><td>00000</td><td>100700</td><td></td><td>Documentation Approval</td></tr><tr><td>ABC</td><td>0000000000</td><td>D</td><td>Jaysa</td><td>Jager</td><td></td><td>02</td><td>Jaysa</td><td>Frieger</td><td></td><td>01/02/2008</td><td>02</td><td>01/01/2004</td><td></td><td></td><td>200 Main Street</td><td></td><td>Richmond</td><td>VA</td><td>23218</td><td>jeemai@virginia.gov</td><td>000001000</td><td>00000</td><td>100700</td><td></td><td>Documentation Approval</td></tr></table>		Dependent Waiting Approval																				Company	Employee ID	Ben Reason	Last Name	First Name	Middle Name	Dependent ID	Dep Last	Dep First	Dep Middle	DOB DOB	Acute/Chronic	Effective Date	Disabled As of Date	Medicare Date	Address 1	Address 2	City	State	Postal	Email Address	Email Type	Benefit Group	Unit	Dept ID	Audit Reason	ABC	0000000000	D	Jaysa	Jager		01	Jaysa	Jager		01/01/1999	01	01/01/2004			200 Main Street		Richmond	VA	23218	jeemai@virginia.gov	000001000	00000	100700		Documentation Approval	ABC	0000000000	D	Jaysa	Jager		02	Jaysa	Frieger		01/02/2008	02	01/01/2004			200 Main Street		Richmond	VA	23218	jeemai@virginia.gov	000001000	00000	100700		Documentation Approval
Dependent Waiting Approval																																																																																																			
Company	Employee ID	Ben Reason	Last Name	First Name	Middle Name	Dependent ID	Dep Last	Dep First	Dep Middle	DOB DOB	Acute/Chronic	Effective Date	Disabled As of Date	Medicare Date	Address 1	Address 2	City	State	Postal	Email Address	Email Type	Benefit Group	Unit	Dept ID	Audit Reason																																																																										
ABC	0000000000	D	Jaysa	Jager		01	Jaysa	Jager		01/01/1999	01	01/01/2004			200 Main Street		Richmond	VA	23218	jeemai@virginia.gov	000001000	00000	100700		Documentation Approval																																																																										
ABC	0000000000	D	Jaysa	Jager		02	Jaysa	Frieger		01/02/2008	02	01/01/2004			200 Main Street		Richmond	VA	23218	jeemai@virginia.gov	000001000	00000	100700		Documentation Approval																																																																										
<div></div>	Review this report to identify any dependents that are currently “Unapproved” and are pending approval when the applicable supporting documentation is received. Follow up with the employee(s) as needed to obtain the supporting documentation as dependents displayed on this report are not currently covered on the employee’s selected plan.																																																																																																		

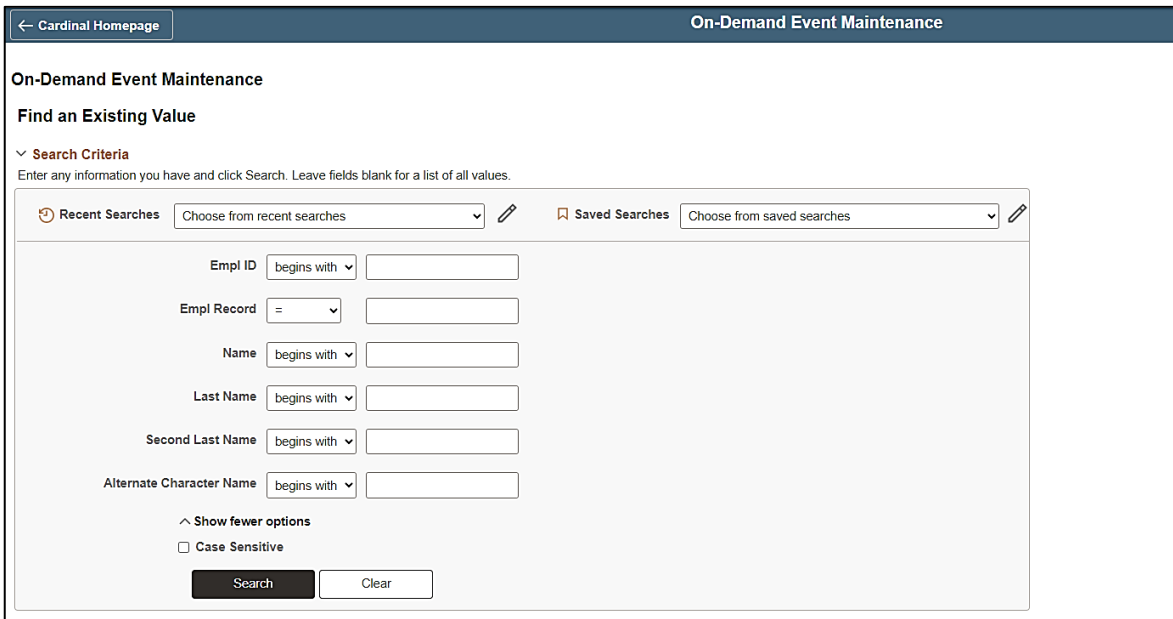
How to Approve a Dependent

Once the employee provides the applicable supporting documentation to add the dependent(s) to their plan coverage, the applicable Benefit Event will need to be re-opened and reprocessed in order to update the dependent(s) to a status of "Approved Dependent". This Benefit Event could have been triggered by:

- A Life Event manually created by a Benefits Administrator
- A Life Event initiated by the employee through Employee Self-Service (ESS)
- An Open Enrollment Event including the addition of dependents to coverage

Step	Action
1.	Navigate to the On-Demand-Event Maintenance page using the following navigation path: NavBar > Menu > Benefits > Managed Automated Enrollments > Events > On-Demand Event Maintenance

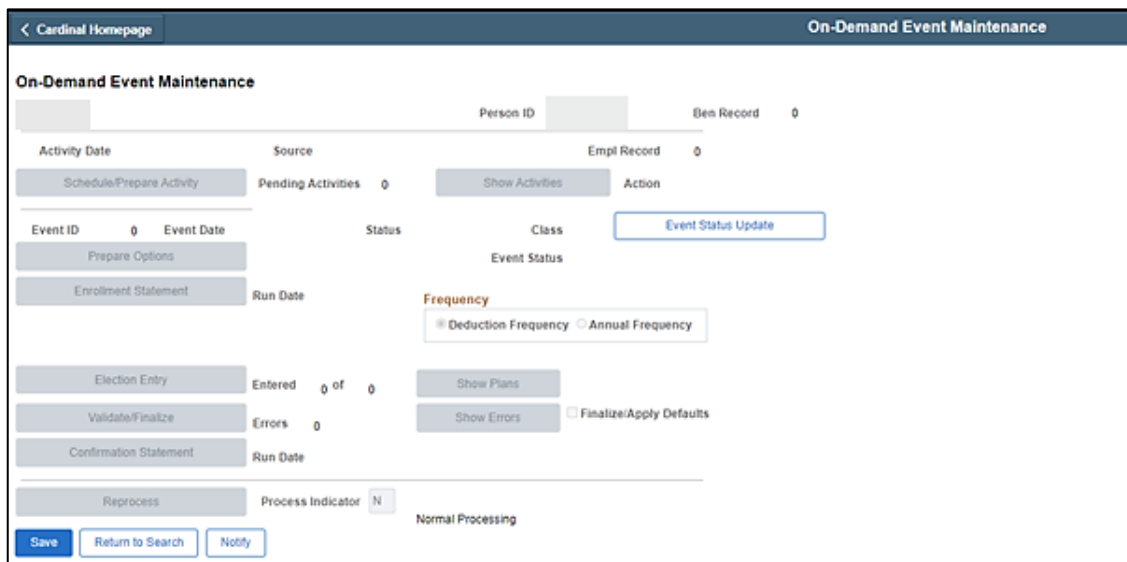
The **On-Demand-Event Maintenance Search** page displays.



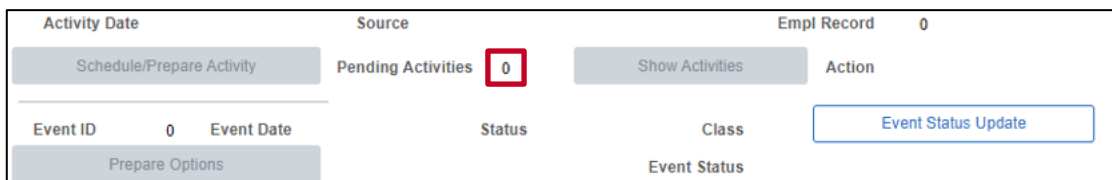

For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> <div> Empl ID begins with ▼ <input type="text"/> </div>
3.	<p>Click the Search button.</p> <div> <input type="button" value="Search"/> <input type="button" value="Clear"/> </div>

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

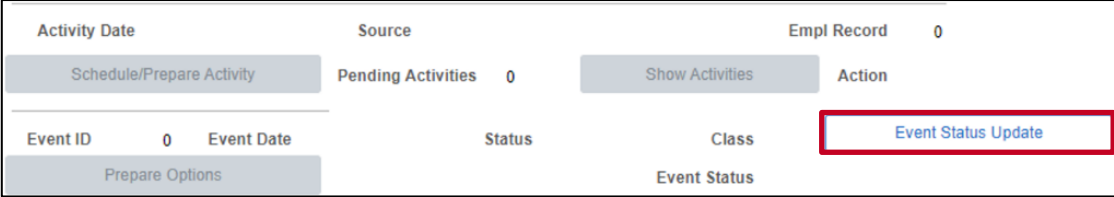



The **Pending Activities** field displays a "0" as there are no Benefit Events for this employee that are open for processing.

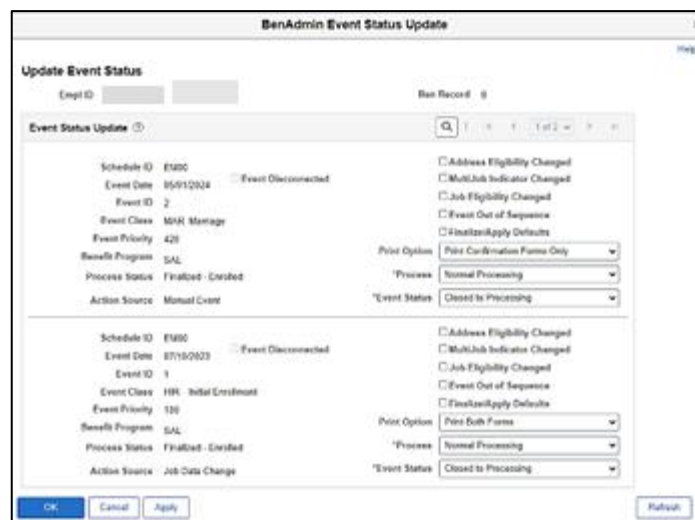


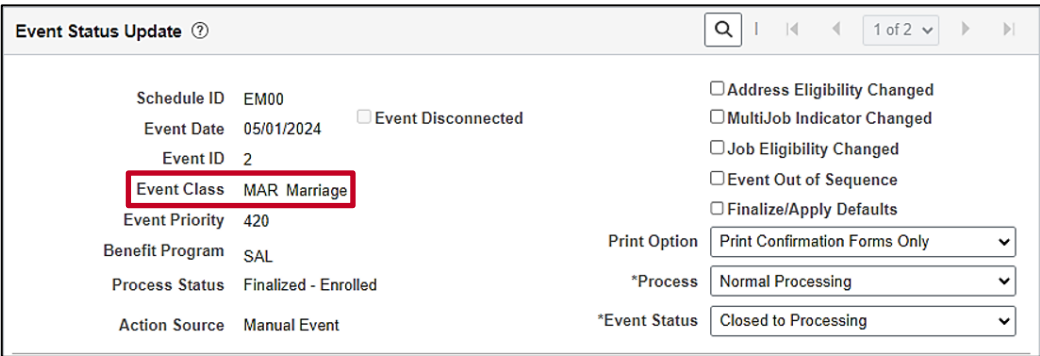


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Step	Action
4.	<p>Click the Event Status Update button.</p> 

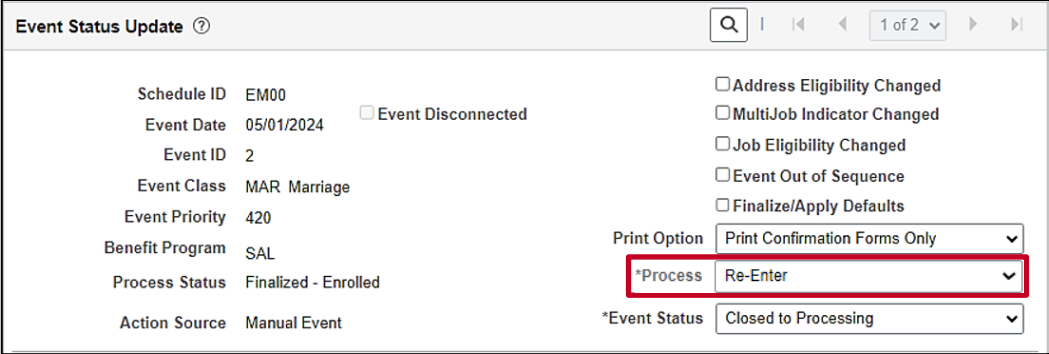
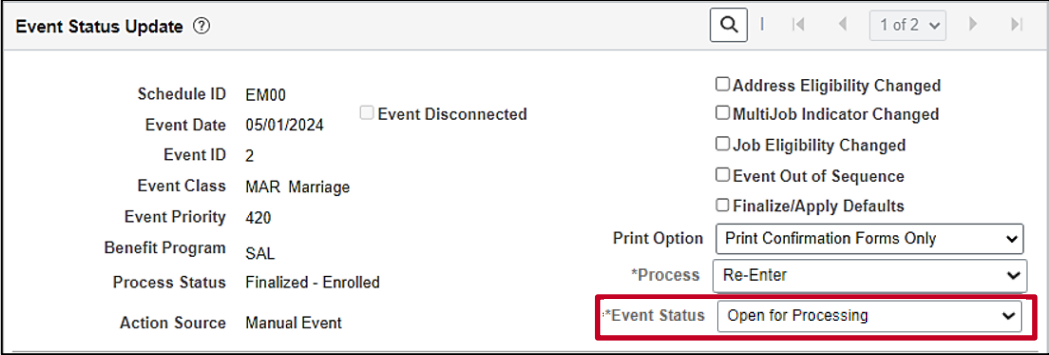

The **Update Event Status** page displays in a pop-up window.



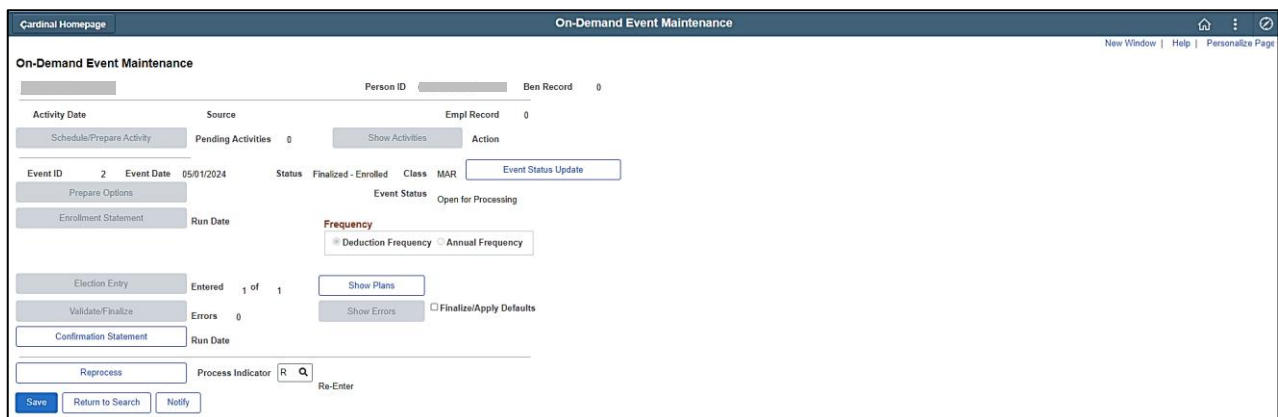
5.	<p>Review the events listed and identify the event used to enroll the dependents.</p> <p>Note: Most of the time, this process involves searching for a New Hire, recent life event, or Open Enrollment event. In this example, it is a MAR (Marriage) Benefit Event. Once the event is identified, it will need to be re-opened to approve the dependent.</p> 
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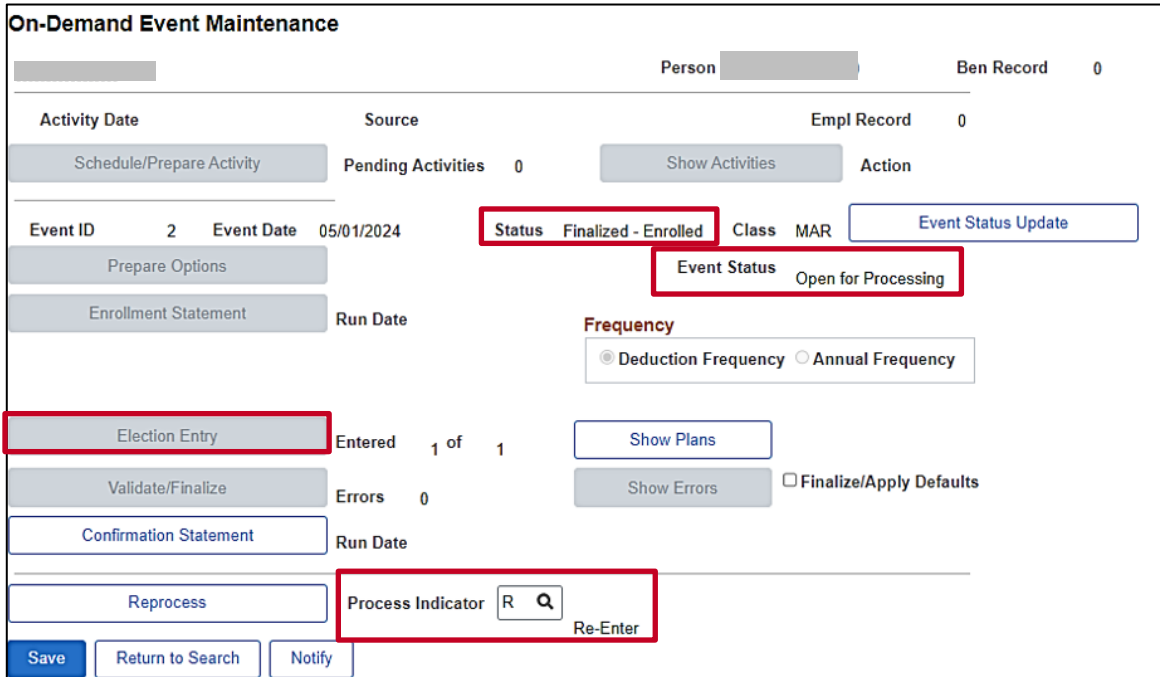
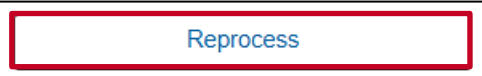
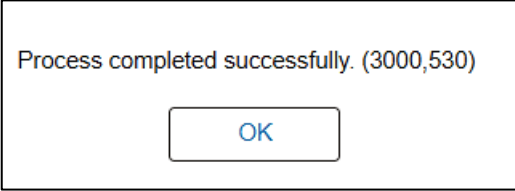
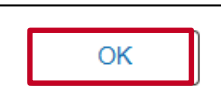
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Step	Action
6.	<p>Click the Process dropdown button and select “Re-Enter”.</p>  <p>The screenshot shows the 'Event Status Update' form. On the left, fields include Schedule ID (EM00), Event Date (05/01/2024), Event ID (2), Event Class (MAR Marriage), Event Priority (420), Benefit Program (SAL), Process Status (Finalized - Enrolled), and Action Source (Manual Event). On the right, there are checkboxes for 'Event Disconnected', 'Address Eligibility Changed', 'MultiJob Indicator Changed', 'Job Eligibility Changed', 'Event Out of Sequence', and 'Finalize/Apply Defaults'. Below these are three dropdown menus: 'Print Option' (Print Confirmation Forms Only), '*Process' (Re-Enter, highlighted with a red box), and '*Event Status' (Closed to Processing).</p>
7.	<p>Click the Event Status dropdown button and select “Open for Processing”.</p>  <p>This screenshot is identical to the previous one, but the '*Event Status' dropdown menu is now highlighted with a red box and set to 'Open for Processing'.</p>
8.	<p>Click the OK button at the bottom of the page.</p>  <p>The screenshot shows three buttons: 'OK' (highlighted with a red box), 'Cancel', and 'Apply'.</p>

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

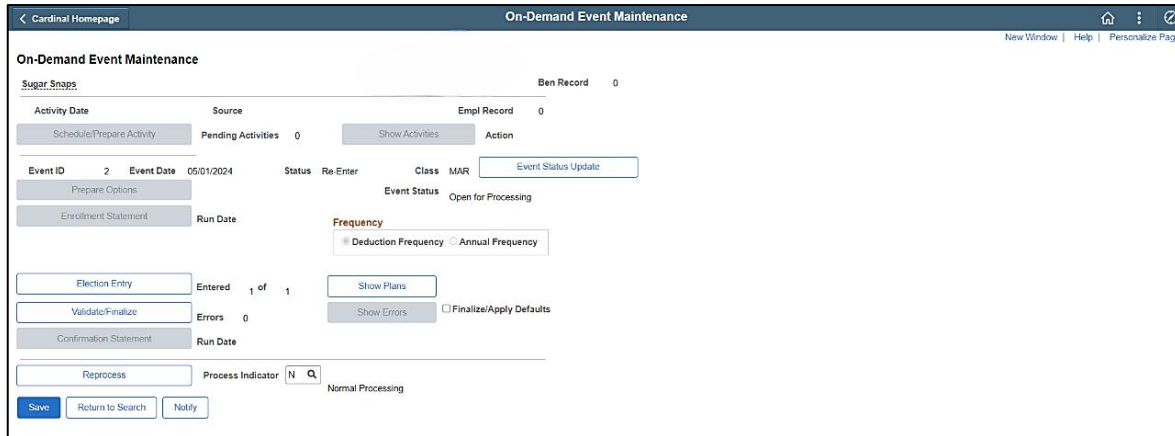


The screenshot shows the 'On-Demand Event Maintenance' page. At the top, there's a header with 'Cardinal Homepage' and 'On-Demand Event Maintenance'. Below this, there are fields for 'Person ID' and 'Ben Record'. The main section contains various tabs and buttons: 'Schedule/Prepare Activity', 'Pending Activities', 'Show Activities', 'Action', 'Event ID', 'Event Date', 'Status', 'Class', 'Event Status', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Run Date', 'Frequency', 'Deduction Frequency', 'Annual Frequency', 'Election Entry', 'Entered', 'Show Plans', 'Validate/Finalize', 'Errors', 'Show Errors', 'Finalize/Apply Defaults', 'Confirmation Statement', 'Reprocess', 'Process Indicator', 'Re-Enter', 'Save', 'Return to Search', and 'Notify'.

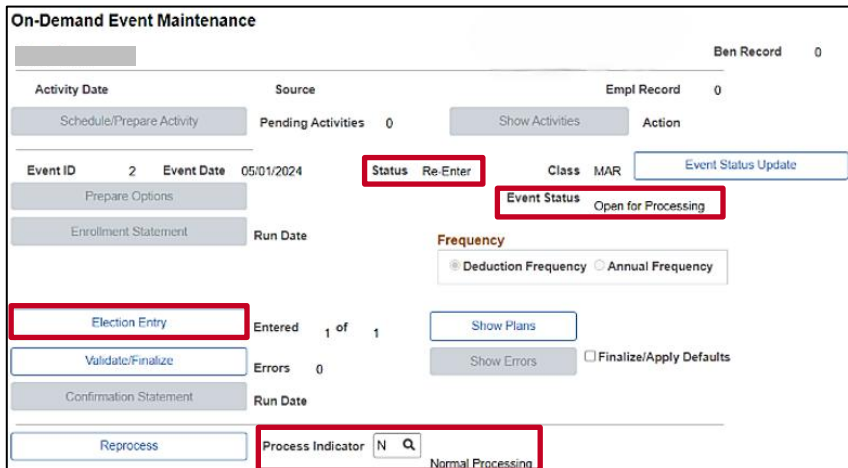
Step	Action
	<p>The Status field still displays “Finalized – Enrolled”. The Event Status field now displays as “Open for Processing”. The Process Indicator field displays an “R” for Re-Enter. Notice that the Election Entry button is disabled.</p> 
9.	<p>Click the Reprocess button.</p> 
	<p>A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.</p> 
10.	<p>Click the OK button to close the message.</p> 

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

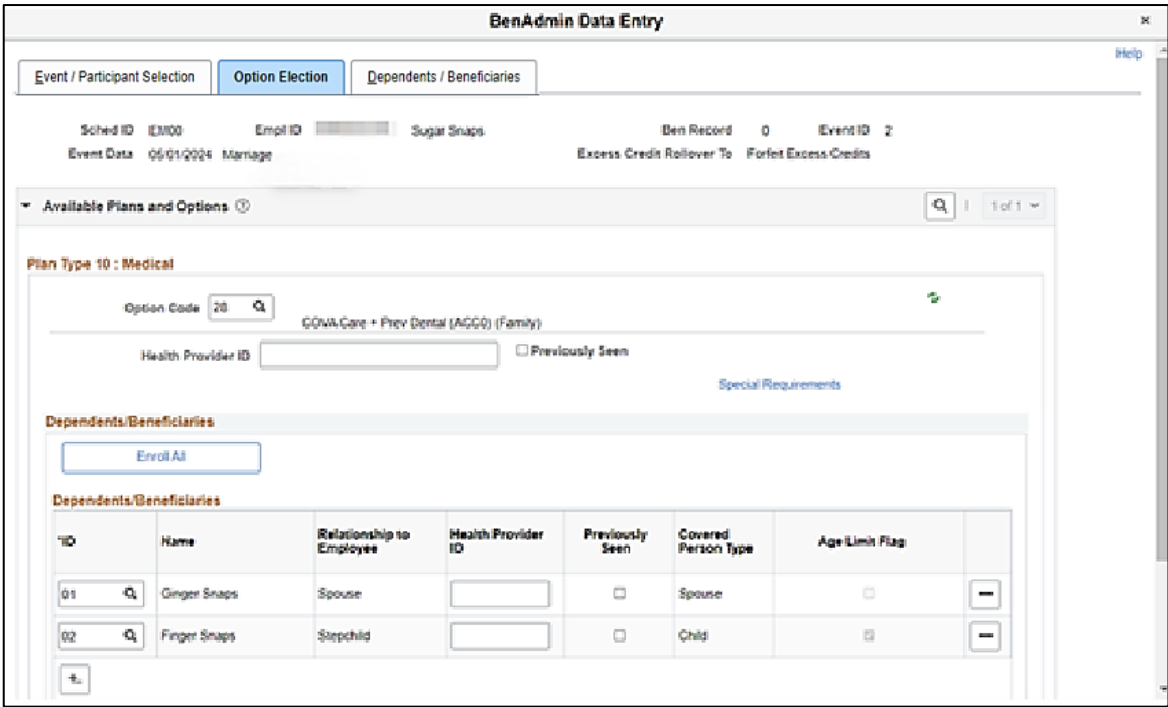
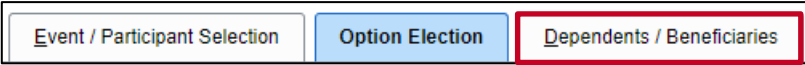



The **Status** field now displays “Re-Enter”. The **Event Status** field still displays as “Open for Processing”. The **Process Indicator** field now displays an “N” for Normal Processing. Notice that the **Election Entry** button is enabled.



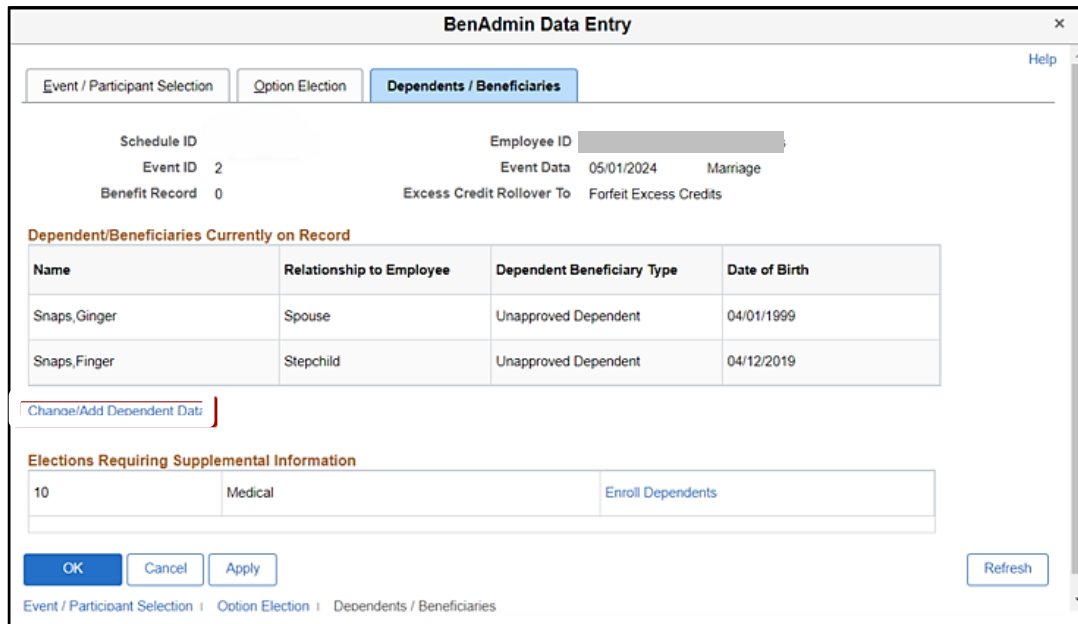
11. Click the **Election Entry** button.



Step	Action
	<p>The BenAdmin Data Entry page displays with the Option Election tab displayed by default.</p> 
12.	<p>Click the Dependents / Beneficiaries tab.</p> 

Step	Action
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The **Dependents/Beneficiaries** tab displays.



BenAdmin Data Entry

Event / Participant Selection | Option Election | **Dependents / Beneficiaries**

Schedule ID: _____ Employee ID: _____
 Event ID: 2 Event Data: 05/01/2024 Marriage
 Benefit Record: 0 Excess Credit Rollover To: Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Snaps, Ginger	Spouse	Unapproved Dependent	04/01/1999
Snaps, Finger	Stepchild	Unapproved Dependent	04/12/2019

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries



Review the dependents in the **Dependent/Beneficiaries Currently on Record** table. Note that the dependents currently have a status of “Unapproved Dependent”.

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Snaps, Ginger	Spouse	Unapproved Dependent	04/01/1999
Snaps, Finger	Stepchild	Unapproved Dependent	04/12/2019

[Change/Add Dependent Data](#)

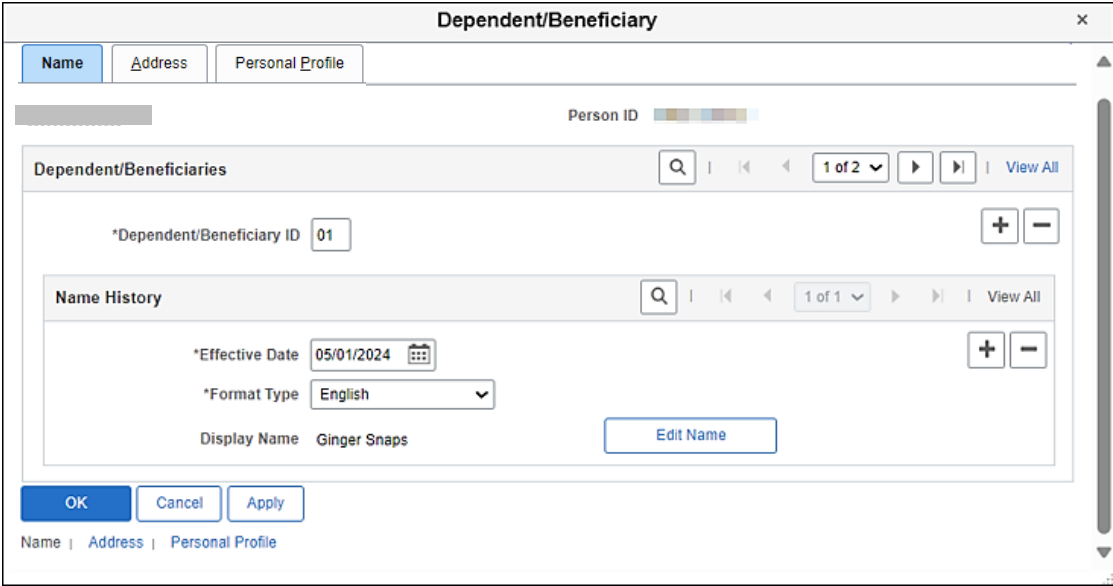

13. Click the **Change/Add Dependent Data** link.

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Snaps, Ginger	Spouse	Unapproved Dependent	04/01/1999
Snaps, Finger	Stepchild	Unapproved Dependent	04/12/2019

[Change/Add Dependent Data](#)



Step	Action
	<p>The Dependent/Beneficiary page displays.</p> 
14.	<p>Click the Personal Profile tab.</p> 



Step	Action
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The **Personal Profile** tab displays.

Dependent/Beneficiary

Name Address **Personal Profile**

Sugar Snaps Person ID

Personal Profile

Dependent/Beneficiary ID 01 Ginger Snaps

*Date of Birth 04/01/1999 Birth Location Birth Country Birth State Birth State Riders/Orders exist

Date of Death Medicare Entitled Date

Riders/Orders

Personal History

*Effective Date 05/01/2024

*Relationship to Employee Spouse

*Dependent Beneficiary Type Unapproved Dependent

*Gender Female

*Marital Status Married As of 04/13/2024



Ensure the applicable dependent is being viewed.

15.

Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent"

Dependent/Beneficiary

Name Address **Personal Profile**

Sugar Snaps Person ID

Personal Profile

Dependent/Beneficiary ID 01 Ginger Snaps

*Date of Birth 04/01/1999 Birth Location Birth Country Birth State Birth State Riders/Orders exist

Date of Death Medicare Entitled Date

Riders/Orders

Personal History

*Effective Date 05/01/2024

*Relationship to Employee Spouse

*Dependent Beneficiary Type **Approved Dependent**

*Gender Female

*Marital Status Married As of 04/13/2024



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Step	Action
16.	Scroll down to the bottom of the page.

The bottom of the **Dependent/Beneficiary** page displays.

The screenshot shows the bottom portion of the 'Dependent/Beneficiary' form. It includes a 'Personal History' section with fields for Effective Date (05/01/2024), Relationship to Employee (Spouse), Dependent Beneficiary Type (Approved Dependent), Gender (Female), and Marital Status (Married). Below this is the 'National ID' section, which contains a table with columns for Country, National ID Type, Description, National ID, and Primary ID. The table shows a record for USA with National ID Type PR and Social Security Number 002-96-8293. At the bottom are buttons for OK, Cancel, and Apply, and a breadcrumb trail: Name | Address | Personal Profile.

17.	Repeat these steps to update the status to “Approved Dependent” for any additional dependents as needed and then click the OK button at the bottom of the page.
-----	--

OK

Cancel

Apply

Name | Address | Personal Profile

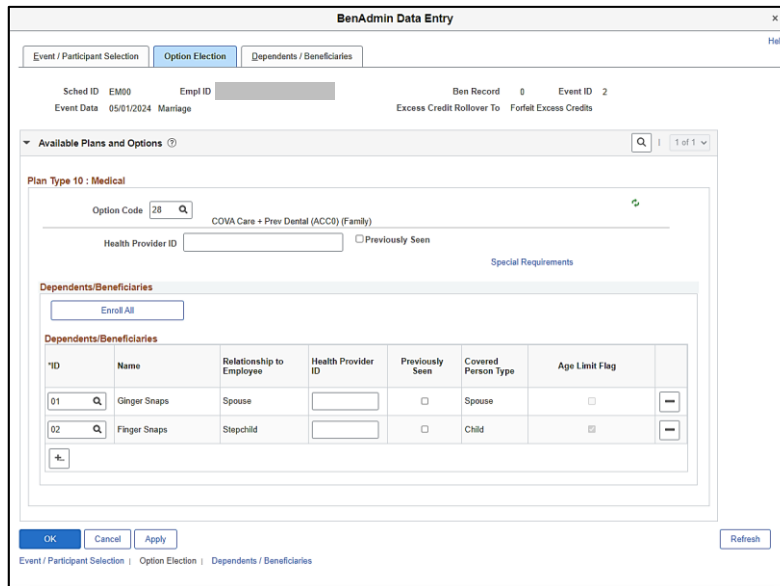
The **Dependents / Beneficiaries** tab redispays

The screenshot shows the 'BenAdmin Data Entry' form with the 'Dependents / Beneficiaries' tab selected. It displays summary information for Schedule ID EM00, Employee ID, and Event ID 2. Below this is a table titled 'Dependent/Beneficiaries Currently on Record' with columns for Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. The table lists two dependents: Snaps, Ginger (Spouse, Approved Dependent, 04/01/1999) and Snaps, Finger (Stepchild, Approved Dependent, 04/12/2019). At the bottom are buttons for OK, Cancel, Apply, and Refresh, and a breadcrumb trail: Event / Participant Selection | Option Election | Dependents / Beneficiaries.

BN361 Managing and Approving Dependents

Step	Action
18.	Once all dependents have been changed from “Unapproved Dependent” to “Approved Dependent”, click the Option Election tab. <div> Event / Participant Selection Option Election Dependents / Beneficiaries </div>

The **Option Election** tab displays.



BenAdmin Data Entry

Event / Participant Selection **Option Election** Dependents / Beneficiaries

Sched ID EM00 Empl ID Ben Record 0 Event ID 2
Event Data 05/01/2024 Marriage Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 28 COVA Care + Prev Dental (ACC0) (Family)

Health Provider ID ☐ Previously Seen Special Requirements

Dependents/Beneficiaries

Enroll All

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Ginger Snaps	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Finger Snaps	Stepchild	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>



OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

19.

Review the **Dependents/Beneficiaries** table and ensure that are applicable dependents are enrolled. Click the **Enroll All** button as needed.

Plan Type 10 : Medical

Option Code  

COVA Care + Prev Dental (ACC0) (Family)





Health Provider ID ☐ Previously Seen


[Special Requirements](#)

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text" value="01"/> 	Ginger Snaps	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	
<input type="text" value="02"/> 	Finger Snaps	Stepchild	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	



20.

Click the **OK** button at the bottom of the page.

OK

[Event / Participant Selection](#) | [Option Election](#) | [Dependents / Beneficiaries](#)



Step	Action
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The **On-Demand Maintenance** page displays.

On-Demand Event Maintenance

Sugar Snaps Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 05/01/2024 Status Entered Class MAR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 1 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

Save Return to Search Notify

21. Confirm that the **Status** field now displays as “Entered” and the **Event Status** field is still “Open for Processing”.

Event ID 2 Event Date 05/01/2024 Status Entered Class MAR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

22. Click the **Validate/Finalize** button.

Election Entry Entered 1 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults


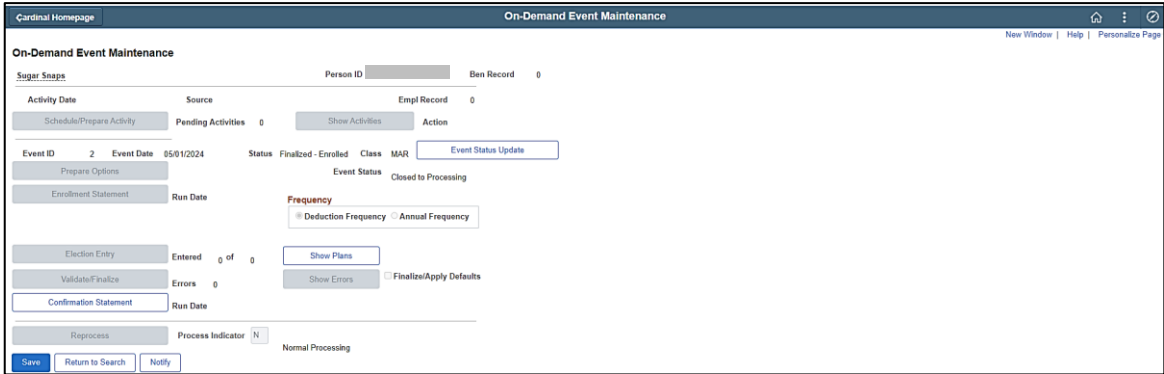
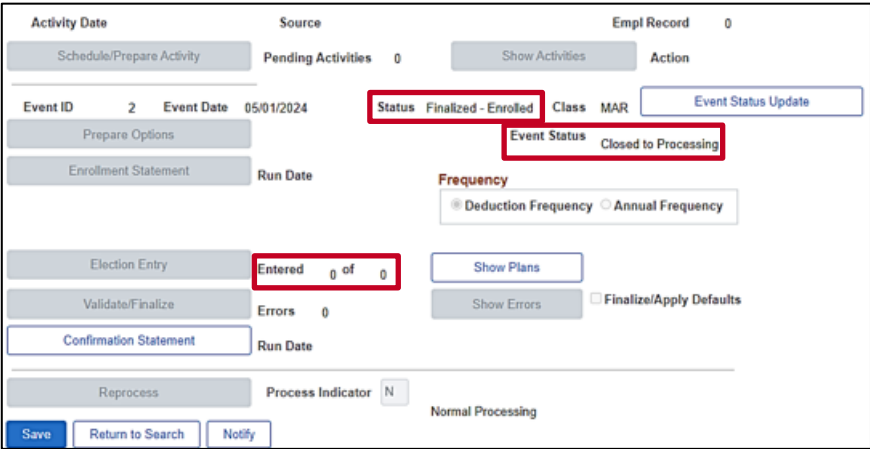

Confirmation Statement Run Date

A **Confirmation** messages displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.

Process completed successfully. (3000,530)

OK

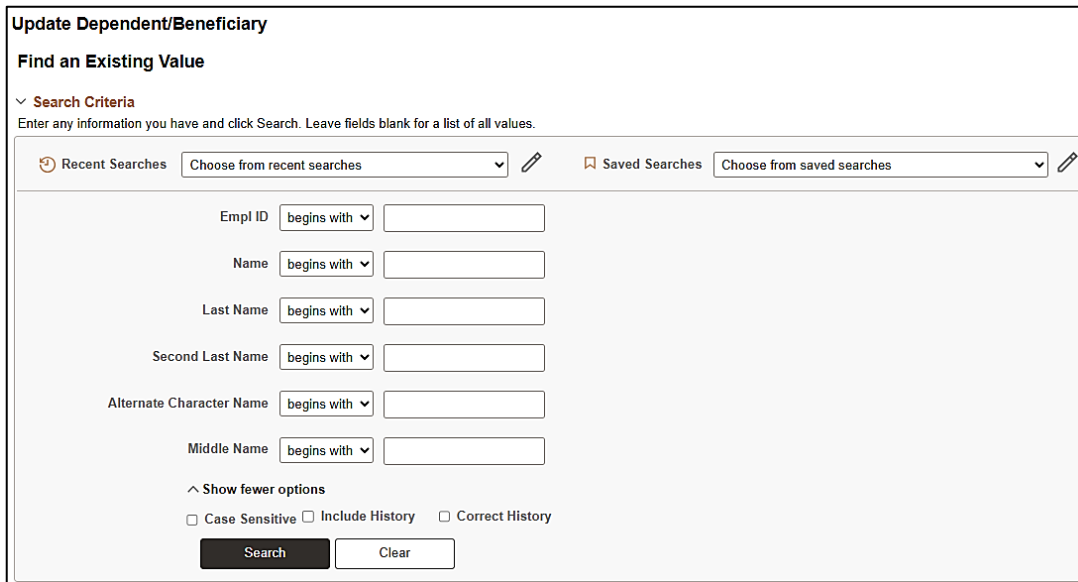



Step	Action
23.	<p>Click the OK button.</p> 
<p>The On-Demand Event Maintenance page redisplay.</p> 	
24.	<p>Confirm that the Status field now displays as “Finalized-Enrolled” and the Event Status field is now “Closed to Processing”.</p> <p>Note: The number of elections entered will reset back to “0 of 0”.</p> 
25.	<p>Click the Save button.</p> 

Managing Dependent Personal Information

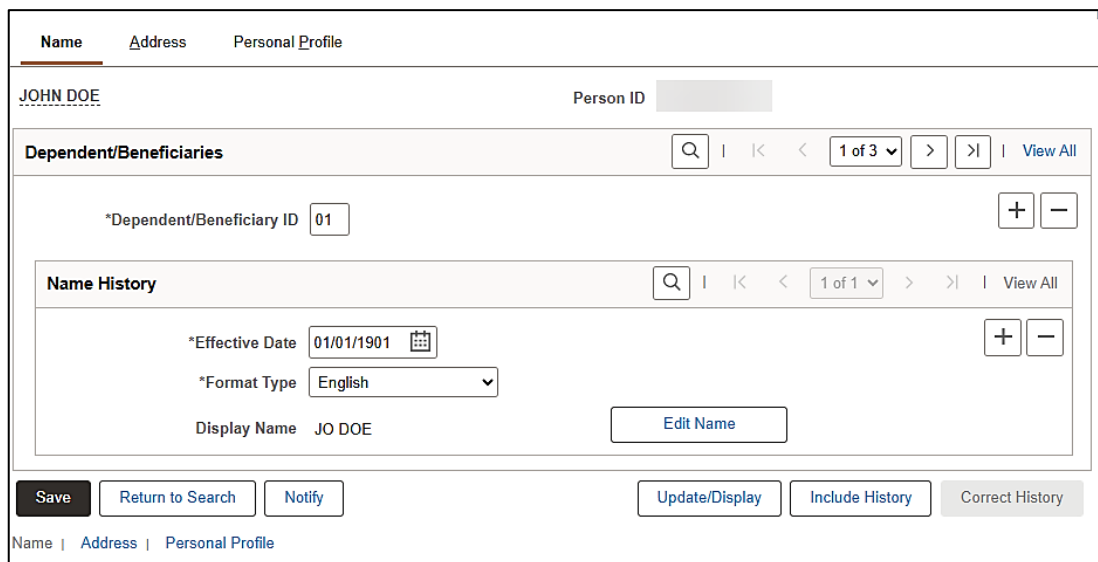
If an Event has been finalized and the Dependent is enrolled, changes can be made by re-opening the Benefit Event and making the necessary changes. For more information on re-opening and reprocessing a Benefit Event, refer to the Job Aid titled **BN361 Re-opening and Reprocessing a Benefit Event**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**. Updates will be sent to the Vendors on the Daily Change file.

If no Benefit Event is available, changes must be made on the **Update Dependent/Beneficiary** page. All updates will be sent to the Vendors on the Monthly Reconciliation File which is sent on the first Monday of each month.

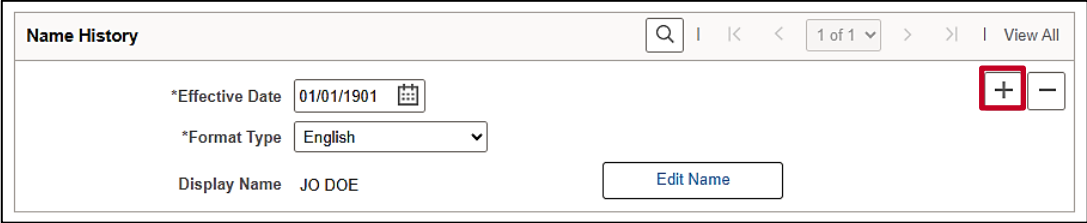
Step	Action
1.	<p>Navigate to the Update Dependent / Beneficiary page using the following navigation path: NavBar > Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary</p> <p>The Update Dependent/Beneficiary Find an Existing Value Search page displays.</p> <div data-bbox="282 915 1354 1493">  </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>

Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> <div> Empl ID begins with <input type="text"/> </div>
3.	<p>Select the Correct History checkbox option.</p> <div> <input type="checkbox"/> Case Sensitive <input type="checkbox"/> Include History <input checked="" type="checkbox"/> Correct History </div> <div> Search Clear </div>
4.	<p>Click the Search button.</p> <div> Search Clear </div>

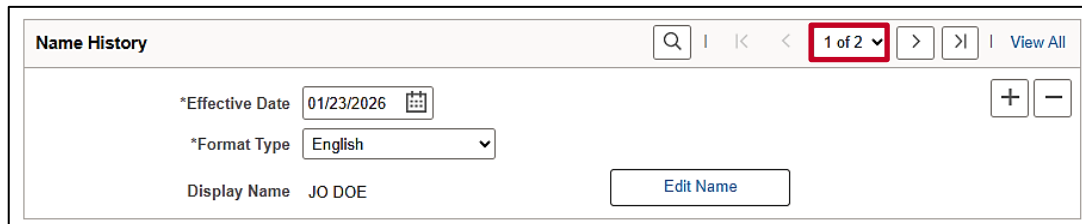
The **Update Dependent/Beneficiary** page displays for the selected employee with the **Name** tab displayed by default.






As an example, the steps below outline the process for a Name Change.

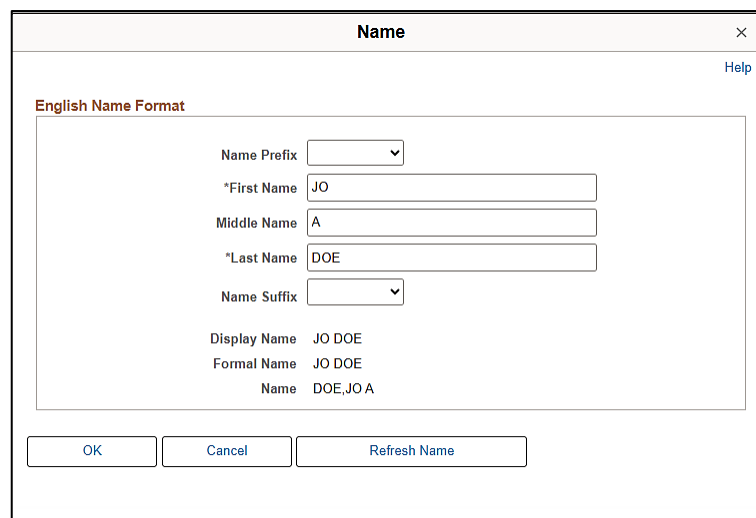
Step	Action
5.	<p>Click the Add a New Row (+) icon in Name History section to add a new effective dated row.</p> 

The **Name History** section redispays with the new effective dated row.



6.	<p>The Effective Date defaults to today's date. Update the Effective Date field as needed.</p> 
7.	<p>Click Edit Name button.</p> 

The **Name** page displays in a pop-up window.



Step	Action
8.	<p>Update the Name fields as needed. For this example, “Smith” has been entered in the Last Name field as an update.</p> <div> <div>*First Name</div> <input type="text" value="JO"/> </div> <div> <div>Middle Name</div> <input type="text" value="A"/> </div> <div> <div>*Last Name</div> <input type="text" value="SMITH"/> </div>