Employee Set Up for Medicare Overview

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take on the **Benefits Personal Data** page before enrolling an employee in Medicare benefits.

Navigation Note: Please note that you may see 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
2/25/2026	Baseline.

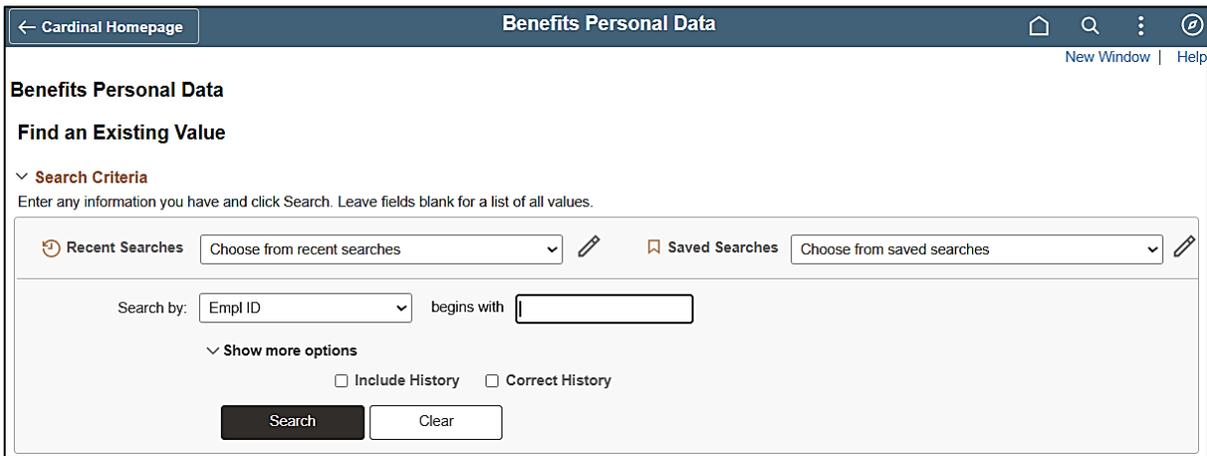## Scenario 1: Employee Turns 65 (with single coverage)

In this scenario the employee has single coverage, turns 65, and is eligible for Medicare. The following actions taken by the BA are completed after the employee has been moved to a job that reflects the "Retiree" status and has a Benefit Program of "RET" or a TLC program.

The Benefits Personal Data Page

Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

Step	Action
1.	Navigate to the **Benefits Personal Data** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Benefits Personal Data**

The **Benefits Personal Data Search** page displays.
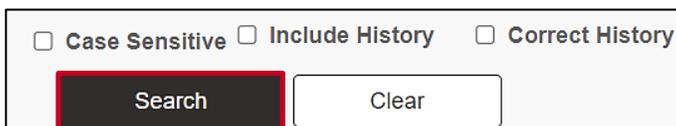

🛈	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
3.	Click the **Search** button.

Step	Action
	The **Benefits Personal Data** page displays for the selected employee.
4.	Click the **Effective Date Calendar** icon in the **Benefits Personal Data – Date Sensitive** section and select the first day of the month in which the employee is retiring.
ℹ	The **Medicare Number** field will be entered by the Agency BA upon receipt. Dashes are not accepted in the field. **Note**: Prescription coverage may be delayed until Medicare Number is provided.

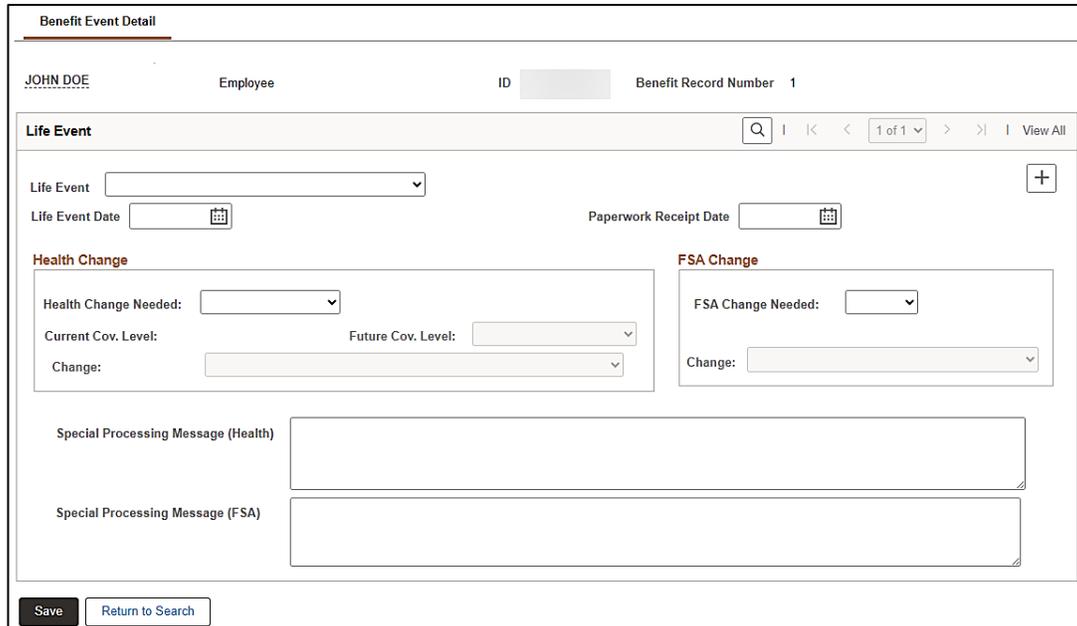| Step	Action
5.	Select both the **Medicare A Indicator** and the **Medicare B Indicator** checkbox options. **Note**: The **Medicare D Indicator** is not used in Cardinal and should not be selected. ☑ Medicare A Indicator ☑ Medicare B Indicator ☐ Medicare D Indicator
ℹ	For End Stage Renal Disease, the **Medicare A**, **B**, and/or **D Indicator** checkbox options will not be checked. OHB is establishing the record for End Stage Renal Disease (ESRD).
6.	Click the **HIPAA Medicare Elig Reason** dropdown button and select either "Age" or "Disability" as the applicable HIPPA Medicare eligibility reason. **Note**: The HIPAA Medicare eligibility reason of "End Stage Renal Disease" is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary. HIPAA Medicare Elig Reason [▾] Age Disability End Stage Renal Disease
7.	Click the **Save** button. [Save] [Return to Search] [Notify]

Process the Medicare Manual Event

To enroll the employee in Medicare, the Benefits Administrator (BA) must create a Benefit Event.

Step	Action
1.	Navigate to the **Benefits Event** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**
	The **Benefit Event Entry Find an Existing Value 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**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **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.
3.	Click the **Search** button.

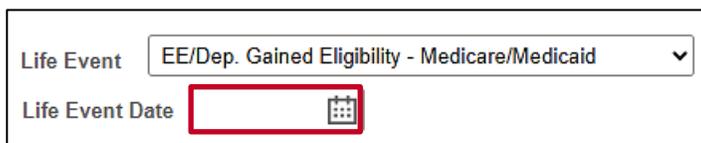| Step	Action
	The **Benefit Event Detail** page displays for the selected employee.
4.	Click the **Life Event** dropdown button and select "EE/Dep. Gained Eligibility – Medicare/Medicaid" list item.
5.	Enter the Effective Date in the **Life Event Date** field. **Note**: The Life Event Date is the first of the month in which the employee is eligible for Medicare.
6.	Enter the **Paperwork Receipt Date**.

Step	Action
7.	Click the **Health Change Needed** dropdown button and select "Yes". Health Change Health Change Needed: [Yes]
8.	Click the **Future Cov. Level** dropdown button and select "Single, Employee". Future Cov. Level: [Single, Employee]
9.	Click the **Change** dropdown button and select "Retiree or Retiree Dependent gained Medicare Eligibility". Change: [Retiree or Retiree Dependent gained Medicare Eligibility]
10.	Click the **FSA Change** dropdown button and select "No". FSA Change FSA Change Needed: [No]
11.	Click the **Save** button. [Save] [Return to Search]
	A **Special Processing Message (Health)** displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created. Special Processing Message (Health): A GEM event will be created for you to: Enroll the retiree in Medicare or Remove the Medicare eligible dependent from existing plan or Remove the Medicare eligible dependent and change plans
ℹ	Now that the GEM Event has been created, the Benefit Event must be processed.
12.	Navigate to the **On-Demand Event Maintenance** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

Step	Action
	The **On-Demand Event Maintenance Find an Existing Value Search** page displays. **On-Demand Event Maintenance** **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 ▾] [ ] Empl Record [= ▾] [ ] Name [begins with ▾] [ ] Last Name [begins with ▾] [ ] Second Last Name [begins with ▾] [ ] Alternate Character Name [begins with ▾] [ ] ∧ Show fewer options ☐ Case Sensitive [Search] [Clear]
13.	Enter the employee's Employee ID in the **Empl ID** field. **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. Empl ID [begins with ▾] [ ]
14.	Click the **Search** button. [Search] [Clear]

Step	Action
	The **On-Demand Event Maintenance** page displays for the selected employee.
15.	Click the **Show Activities** button.
	The **BAS Activity** page displays in a pop-up window.

![Cardinal logo]

Step	Action
ℹ️	If an "MSC" BAS Action is listed, select the "GEM" BAS Action. The "MSC" BAS Action will process automatically when the Ben Admin process runs.
16.	Click the **OK** button.
	The **On-Demand Event Maintenance** page redisplays.

![Cardinal logo]

Step	Action
17.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. Schedule/Prepare Activity
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
18.	Click the **OK** button to close the message. OK
	The **On-Demand Event Maintenance** page redisplays.
19.	Click the **Election Entry** button. Election Entry

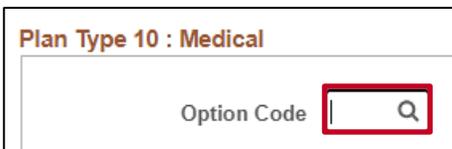| Step	Action
	The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default. **BenAdmin Data Entry** ✕ Help Event / Participant Selection **Option Election** Dependents / Beneficiaries Sched ID EM00 Empl ID JOHN DOE Ben Record 1 Event ID 3 Event Data 01/01/2026 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits ⌄ Available Plans and Options ⓘ 🔍 1 of 1 **Plan Type 10 : Medical** Option Code 🔍 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 🔍 ☐ ☐ − +.. OK Cancel Apply
20.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section. **Plan Type 10 : Medical** Option Code 🔍

Step	Action
	The **Look Up Option Code** page displays in a pop-up window. **Look Up Option Code** ✕ Help Cancel **Search Results** View 100 |< < 1-5 of 5 ∨ > >| | Option Code	Option Type	Benefit Plan	Coverage Code
---	---	---	---
104	Option	MODV	1
57	Option	65DV	1
96	Option	65MO	1
97	Option	A65	1
W	Waive Optn	(blank)	(blank)	
ℹ	If the Over 65 Benefit Plans do not populate, ensure the Medicare information was accurately entered. If the information is incorrect, update as needed and then complete an "Open" / "Assign Benefit Program" to the GEM Event to pick up the change. For additional information on re-opening and reprocessing Benefit Events, see the Job Aid titled **Re-opening and Reprocessing a Benefit Event** located on the Cardinal website in **Job Aids** under **Learning**.
21.	Select the applicable Option Code. In this example, **Option Code** "57" is selected. | Option Code	Option Type	Benefit Plan	Coverage Code
---	---	---	---
104	Option	MODV	1
57	Option	65DV	1
96	Option	65MO	1
97	Option	A65	1
W	Waive Optn	(blank)	(blank)	

![Cardinal logo]

Step	Action
	The **Plan Type 10: Medical** section redisplays with the selected **Option Code** displayed. **Plan Type 10 : Medical** Option Code 57 🔍 Advan65 + RX + Den&Vision (65DV) (Single) Health Provider ID [ ] ☐ Previously Seen
22.	Click the **OK** button. [OK] [Cancel] [Apply]
	The **On-Demand Event Maintenance** page redisplays. **On-Demand Event Maintenance** JOHN DOE Person ID [ ] Ben Record 1 Activity Date Source Empl Record 0 [Schedule/Prepare Activity] Pending Activities 0 [Show Activities] Action Event ID 3 Event Date 01/01/2026 Status Entered Class GEM [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 🔍 Normal Processing [Save] [Return to Search] [Previous in List] [Next in List] [Notify]
23.	Click the **Validate/Finalize** button. [Validate/Finalize]

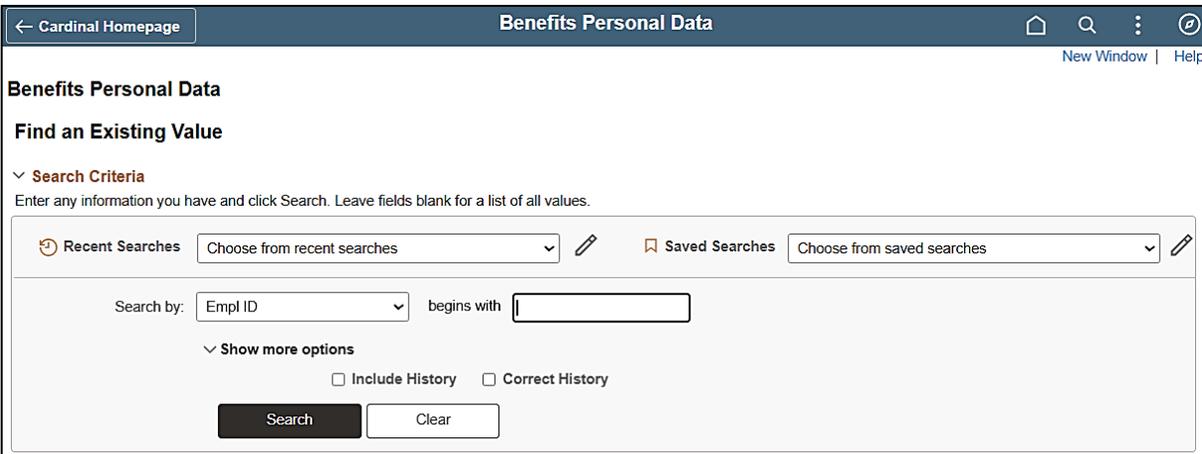| Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
24.	Click the **OK** button to close the message. OK

Scenario 2: Employee Turns 65 (with dependents covered)

In this scenario, the employee has "Employee + Spouse" coverage, the employee turns 65 and is eligible for Medicare, however the spouse is not eligible for Medicare. The following actions taken by the BA are completed after the employee has been moved to a job that reflects the "Retiree" status and has a Benefit Program of "RET" or a TLC program.

Note: If the employee turns 65 with family coverage, hire the youngest dependent as an employee.

The Benefits Personal Data Page
Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

Step	Action
1.	Navigate to the **Benefits Personal Data** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Benefits Personal Data**

The **Benefits Personal Data Search** page displays.

ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **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.

Step	Action
3.	Click the **Search** button.
	The **Benefits Personal Data** page displays for the selected employee.
4.	Click the **Effective Date Calendar** icon in the **Benefits Personal Data – Date Sensitive** section and select the first day of the month in which the employee is retiring.
ⓘ	The **Medicare Number** field will be entered by the Agency BA when received, and dashes are not accepted in the field. **Note**: Prescription coverage may be delayed until Medicare Number is provided.

Step	Action
5.	Select both the **Medicare A Indicator** and the **Medicare B Indicator** checkbox options. **Note**: The **Medicare D Indicator** is not used in Cardinal and should not be selected. ☑ Medicare A Indicator ☑ Medicare B Indicator ☐ Medicare D Indicator
ⓘ	For End Stage Renal Disease, the **Medicare A**, **B**, and/or **D Indicator** checkbox options will not be checked. OHB is establishing the record for End Stage Renal Disease (ESRD).
6..	Click the **HIPAA Medicare Elig Reason** dropdown button and select either "Age" or "Disability" as the applicable HIPPA Medicare eligibility reason. **Note**: The HIPAA Medicare eligibility reason of "End Stage Renal Disease" is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary. HIPAA Medicare Elig Reason ⌄ Age Disability End Stage Renal Disease
7..	Click the **Save** button. Save Return to Search Notify

Process the Medicare Manual Event

To enroll the employee in Medicare, the Benefits Administrator (BA) must create a Benefit Event.

Before adding the manual event for the employee, the Agency BA must confirm that the employee has a dependent listed on their current benefit enrollment on the **Health Benefits** page.

Step	Action
1.	Navigate to the **Health Benefits** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Health Benefits**
	The **Health Benefits Find an Existing Value 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**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

Step	Action
3.	Click the **Search** button.

☐ Case Sensitive ☐ Include History ☐ Correct History

[Search] [Clear]

	The **Health Benefits** page displays for the selected employee.

Health Benefits

JOHN DOE   Employee   ID [   ]   Benefit Record Number 0

Plan Type   🔍 | |◁ ◁ 1 of 1 ▾ ▷ ▷| | View All

Plan Type 10   Medical

Coverage   🔍 | |◁ ◁ 1 of 1 ▾ ▷ ▷| | View All

Coverage Begin Date 07/01/2021   Deduction Begin Date 07/01/2021

Coverage Election

◉ Elect   ○ Waive   ○ Terminate   Election Date 04/15/2022

Benefit Program RET
Benefit Plan CHA1   COVA HlthAwr + Exp Den&Vis   Option Code 6
Coverage Code 2   Self + Spouse   ☐ Previously Seen
Health Provider ID
Employee Status Active

[Enroll All Dependents]

Dependent/Beneficiaries   1-1 of 1 ▾

ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg
01	Doe,Jo	Spouse		☐	Spouse	N

[Save] [Return to Search] [Notify] [Refresh]   [Update/Display] [Include History] [Correct History]

ℹ	In this example, the Agency BA can see that the employee currently has a "Self + Spouse" medical coverage with their spouse covered under the current medical plan.
4.	Navigate to the **Benefits Event** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**

Step	Action
	The **Benefit Event Entry Find an Existing Value Search** page displays.
5.	Enter the employee's Employee ID in the **Empl ID** field. **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.
6.	Click the **Search** button.

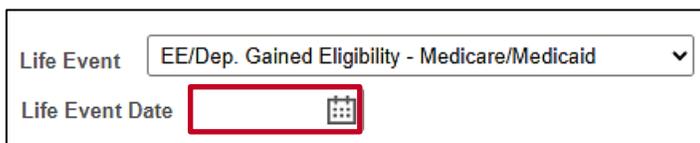| Step	Action
	The **Benefit Event Detail** page displays for the selected employee.
7.	Click the **Life Event** dropdown button and select "EE/Dep. Gained Eligibility – Medicare/Medicaid" list item.
8.	Enter the Effective Date in the **Life Event Date** field. **Note**: The Life Event Date is the first of the month in which the employee is eligible for Medicare.
9.	Enter the **Paperwork Receipt Date**.

Step	Action
10.	Click the **Health Change Needed** dropdown button and select "Yes". **Health Change** Health Change Needed: Yes
11.	Click the **Future Cov. Level** dropdown button and select "Single, Employee". Future Cov. Level: Single, Employee
12.	Click the **Change** dropdown button and select "Retiree or Retiree Dependent gained Medicare Eligibility". Change: Retiree or Retiree Dependent gained Medicare Eligibility
13.	Click the **FSA Change** dropdown button and select "No". **FSA Change** FSA Change Needed: No
14.	Click the **Save** button. Save Return to Search
	A **Special Processing Message (Health)** displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created. Special Processing Message (Health) A GEM event will be created for you to: Enroll the retiree in Medicare or Remove the Medicare eligible dependent from existing plan or Remove the Medicare eligible dependent and change plans
ⓘ	Now that the GEM Event has been created, the Benefit Event must be processed.
15.	Navigate to the **On-Demand Event Maintenance** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

Step	Action
	The **On-Demand Event Maintenance Find an Existing Value Search** page displays. **On-Demand Event Maintenance** **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 ▾] [ ] Empl Record [= ▾] [ ] Name [begins with ▾] [ ] Last Name [begins with ▾] [ ] Second Last Name [begins with ▾] [ ] Alternate Character Name [begins with ▾] [ ] ∧ Show fewer options ☐ Case Sensitive [Search] [Clear]
16.	Enter the employee's Employee ID in the **Empl ID** field. **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. Empl ID [begins with ▾] [ ]
17.	Click the **Search** button. [Search] [Clear]

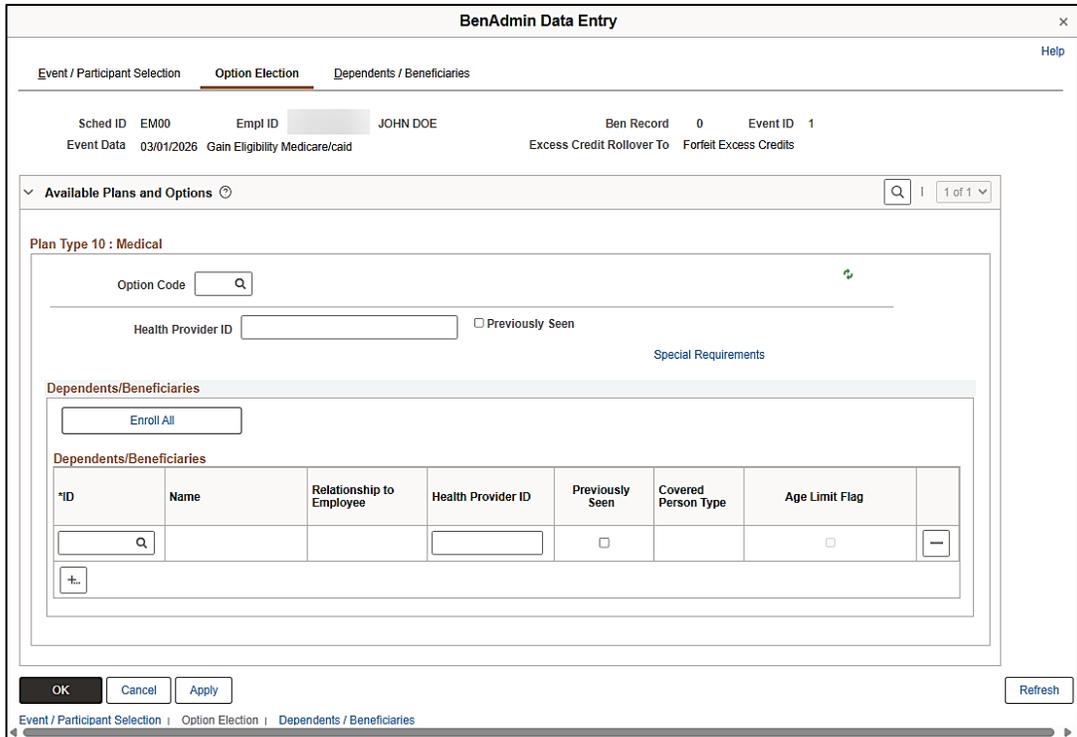| Step	Action
	The **On-Demand Event Maintenance** page displays.
18.	Click the **Show Activities** button.
	The **BAS Activity** page displays in a pop-up window.

Step	Action
ℹ	If an "MSC" BAS Action is listed, select the "GEM" BAS Action. The "MSC" BAS Action will process automatically when the Ben Admin process runs.
19.	Click the **OK** button.
	The **On-Demand Event Maintenance** page redisplays.

Step	Action
20.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. Schedule/Prepare Activity
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
21.	Click the **OK** button to close the message. OK
	The **On-Demand Event Maintenance** page redisplays.
22.	Click the **Election Entry** button. Election Entry

Step	Action
	The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.
23.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section.

Step	Action
	The **Look Up Option Code** page displays in a pop-up window.
(i)	If the Over 65 Benefit Plans do not populate, ensure the Medicare information was accurately entered. If the information is incorrect, update as needed and then complete an "Open" / "Assign Benefit Program" to the GEM Event to pick up the change. For additional information on re-opening and reprocessing Benefit Events, see the Job Aid titled **Re-opening and Reprocessing a Benefit Event** located on the Cardinal website in **Job Aids** under **Learning**.
24.	Select the applicable Option Code. In this example, **Option Code** "57" is selected.

Step	Action
	The **Plan Type 10: Medical** section redisplays with the selected Option Code displayed.
25.	Click the **OK** button.
	The **On-Demand Event Maintenance** page redisplays.
26.	Click the **Validate/Finalize** button.

Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
27.	Click the **OK** button to close the message. OK

Hire the Dependent as an Employee

Before hiring the dependent as an employee, the Agency BA must gather the personal information (e.g., Social Security number, date of birth, etc.) from the **Update Dependent/Beneficiary** page. The information on this page must be confirmed with the dependent. Once the information is gathered, the Agency BA can complete the hire process. In this example, the spouse is being hired as an employee.

Step	Action
1.	Navigate to the **Update Dependent/Beneficiary** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary**
	The **Update Dependent/Beneficiary Find an Existing Value Search** page displays.
ℹ️	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 **Empl ID** field. **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.
3.	Click the **Search** button.

Step	Action

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

4.	Click the **Address** tab to review the Address information for the dependent.

The **Address** page displays.

Step	Action
5.	Confirm that the information on this page is accurate for the dependent.
6.	Click the **Personal Profile** tab. Name Address Personal Profile
	The **Personal Profile** page displays.
7.	Confirm that the information on this page is accurate for the dependent. **Note**: This information will be used to hire the dependent as an employee.
8.	Navigate to the **Add a Person** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Add a Person**
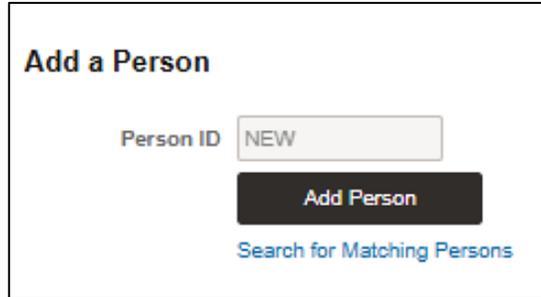
Step	Action
	The **Add a Person** page displays.
9.	Click the **Add Person** button.
	The **Modify a Person** page displays with the **Biographical Detail** tab displayed by default.
10.	The **Effective Date** field defaults to the system date. If the hire date is prior to system date, update to the hire date. **Note**: The system will not allow a future Effective Date on the **Modify a Person** page. However, this can be done on the **Job Data** page.
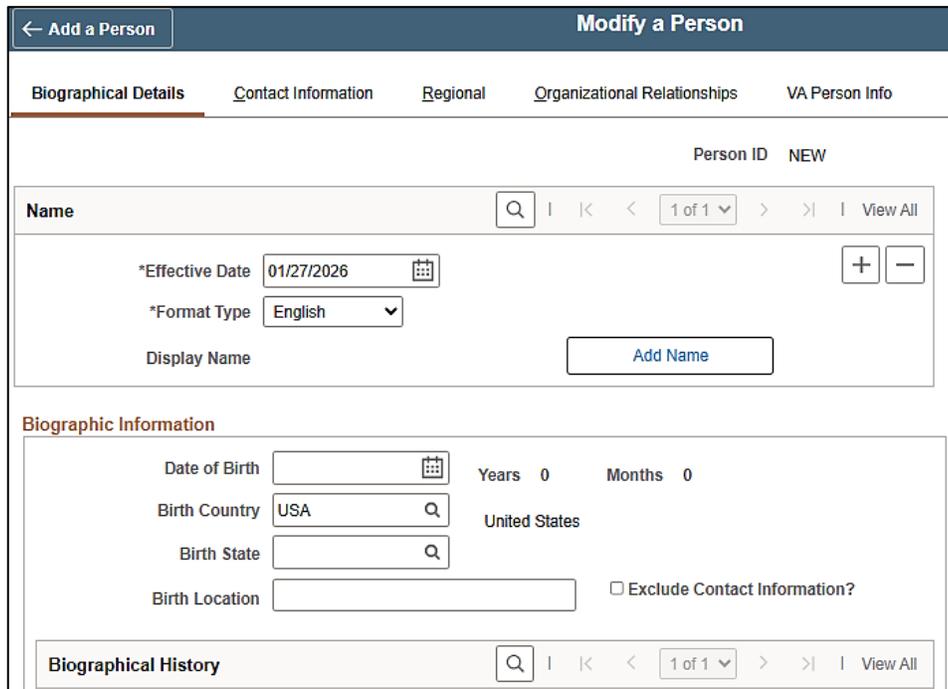
Step	Action
ℹ	The **Effective Date** cannot be greater than today's date when adding/modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled **HR351 Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.
11.	Click the **Add Name** button. Add Name

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

Step	Action
12.	Optionally, click the **Name Prefix** dropdown button and select the applicable prefix. Name Prefix
13.	Enter the dependent's first name in the **First Name** field (required). *First Name
14.	Optionally, enter the dependent's middle name in the **Middle Name** field. Middle Name
ℹ	Do not add a period after the middle initial.

Step	Action
14.	Enter the dependent's last name in the **Last Name** field (required).
	*Last Name [ ]
ℹ	Do not include suffixes (Jr, Sr, or IV) in the **Last Name** field.
15.	Click the **Name Suffix** dropdown button and select the applicable suffix as needed.
	Name Suffix [▼]
16.	Click the **OK** button.
	OK Cancel Refresh Name

The **Modify a Person** page refreshes.

Biographical Details	Contact Information Regional Organizational Relationships VA Person Info

Jo Doe   Person ID   NEW

Name   🔍 I |< < 1 of 1 ✔ > >| I View All

*Effective Date 01/27/2026 📅   [+] [−]
*Format Type English ▼
Display Name Jo Doe   [Edit Name]

Biographic Information

Date of Birth [   ] 📅   Years 0   Months 0
Birth Country USA 🔍   United States
Birth State [   ] 🔍
Birth Location [   ]   ☐ Exclude Contact Information?

Step	Action
17.	Scroll down to the **Biographic Information** section.
	Biographic Information Date of Birth [ ] 📅 Years 0 Months 0 Birth Country USA 🔍 United States Birth State [ ] 🔍 Birth Location [ ] ☐ Exclude Contact Information?

Step	Action
18.	Click the **Date of Birth Calendar** icon and select the dependent's date of birth (required). **Note**: the **Birth Countr**y field defaults to "USA". This can be updated but is not required as this data is not reported.
19.	Scroll down to the **Biographical History** section.
ℹ	The **Effective Date** field within this section defaults to the effective date selected above. Do not change.
20.	Click the **Gender** dropdown button and select the dependent's gender. **Note**: This field is a required field for benefits and payroll purposes and must provide the dependent's legal gender. This is not to be confused with the optional **Preferred Gender** field located on the **VA Person** Info tab.
21.	Click the **Marital Status** dropdown button and select the dependent's legal marital status.
ℹ	The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.

Step	Action
22.	Scroll down to the **National ID** section.
23.	Enter the employee's Social Security Number (SSN) in the **National ID** field. **Note**: It is not necessary to enter dashes. When tabbing out of the field, the appropriate format will auto-populate.
24.	Click the **Contact Information** tab at the top of the page or the **Contact Information** link at the bottom of the page.

The **Contact Information** page displays.

Step	Action
25.	Click the **Add Address Detail** link. Add Address Detail
	The **Address History** page displays. **Address History** Address Type Home **Address History** 🔍 | I< < 1 of 1 ∨ > >I *Effective Date 01/27/2026 📅 Address + — Country USA 🔍 *Status A 🔍 Add Address OK Cancel Refresh
ℹ	The **Effective Date** field within this section defaults to the date previously selected. Do not change.
ℹ	An **Address Type** of "Home" is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information.
26.	Click the **Add Address** link. *Status A 🔍 Add Address

Step	Action
	The **Edit Address** page displays. **Edit Address** Country United States Address 1 [_____] Address 2 [_____] Address 3 [_____] City [_____] State [____🔍] Postal [____] County [_____] [OK] [Cancel]
27.	Click the **OK** button. [**OK**] [Cancel]
	The **Address History** page refreshes. **Address History** Address Type Home **Address History** 🔍 | |< < [1 of 1 ⌄] > >| [+] [−] *Effective Date [01/27/2026 📅] Address 100 Main St Country [USA 🔍] Richmond, VA 99999 *Status [A 🔍] Add Address [OK] [Cancel] [Refresh]
28.	Click the **OK** button. [**OK**] [Cancel] [Refresh]

Step	Action
	The **Contact Information** page redisplays.
29.	Click the **Phone Type** dropdown button and select the type of phone.
30.	Enter the applicable telephone number in the **Telephone** field.
ℹ	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.
31.	Click the **Preferred** checkbox option to identify the dependent's preferred phone number.

Step	Action
32.	Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (**+**) and then repeating **Steps 29 – 31**. **Phone Information** 1-1 of 1 | View All *Phone Type: Mobile | Telephone: 555/555-5555 | Extension: | Preferred: ☑ | + | −
33.	Scroll down to the **Email Option Selection** and **Email Addresses** sections. **Email Option Selection** ⦿ Agency Provided Email ○ Pending Agency Provided Email ○ Employee Provided Email 1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, **except:** 2. When no email address is available, select applicable email option and **ALWAYS** use noemail@virginia.gov **Email Addresses** *Email Type: | *Email Address: | Preferred: ☐ | + | −
34.	Select the **Employee Provided Email** radio button option in the **Email Option Selection** section. **Email Option Selection** ○ Agency Provided Email ○ Pending Agency Provided Email ⦿ Employee Provided Email
35.	Complete the following information for the dependent: • Click the **Email Type** dropdown button and select "Personal" • Enter the email address in the **Email Address** field • Select the **Preferred** checkbox option **Email Addresses** *Email Type: Personal | *Email Address: Jo.Doe@zmail.com | Preferred: ☑ | + | −
ℹ	When no email address is available, use **noemail@virginia.gov**. This can be replaced with a personal email address once it is obtained.

![Cardinal logo]

Step	Action
36.	Click the **Regional** tab at the top of the page or the **Regional** link at the bottom of the page. Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info
	The **Regional** page displays.
ℹ	The **Ethnic Group** field is optional, but can be entered if provided by the dependent. It may also be filled out by the dependent in Employee Self-Service. The **Regulatory Region** field defaults to "USA". Do not change. The **Veteran** field is also optional and can be entered if the dependent provided their military service and service documentation. This information is used for reporting purposes and should be entered if provided.
37.	Click the **VA Person Info** tab at the top of the page or **VA Person Info** link at the bottom of the page. Biographical Details Contact Information **Regional** Organizational Relationships VA Person Info Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info

Step	Action
	The **VA Person Info** page displays. *[Screenshot of VA Person Info page showing tabs: Biographical Details, Contact Information, Regional, Organizational Relationships, VA Person Info. Fields include Jo Doe, Person ID NEW, Power Of Attorney, Linked Participant EmplID, Preferred Pronoun, Preferred Gender. Buttons: Save, Notify, Refresh, Add, Update/Display]*
38.	Enter the Employee ID of the employee to be linked to the dependent in the **Linked Participant EmplID** field and tab out of the field. Linked Participant EmplID [🔍]
	The **VA Person Info** page redisplays with the **Click here to add Other Linked Participant Details** link displayed. *[Screenshot of VA Person Info page with tabs: Biographical Details, Contact Information, Regional, Organizational Relationships, VA Person Info. Fields: Jo Doe, Person ID NEW, Power Of Attorney, Linked Participant EmplID with "Click here to add Other Linked Participant Details" link, Preferred Pronoun, Preferred Gender. Buttons: Save, Notify, Refresh, Add, Update/Display, Include History, Correct History]*
ℹ️	If more than one dependent needs to be linked, refer to the Job Aid titled **BN361 Linking Dependents and Retirees**, located on the Cardinal website under **Job Aids** in **Learning**.
39.	Click the **Organizational Relationships** tab. *[Screenshot of tabs: Biographical Details, Contact Information, Regional, Organizational Relationships (highlighted), VA Person Info]*

Step	Action
	The **Organizational Relationships** page displays.

| 40. | Select the **Employee** checkbox option. |
| | **Note**: The **Hire** list item appears in the **Select Checklist Code** field after selecting the **Employee** checkbox option. |

| 41. | Click the **Add Relationship** button. |
| | **Note**: Clicking the **Add Relationship** button validates all the dependent's personal data. If any required information is missing, Cardinal will generate an alert. |

| (i) | **IMPORTANT**: **Do not** click the **Back** button in the browser to go back, as all information that has been entered will be lost. |
| | Review missing information alert message, and go to the tab where the missing information is captured. Reenter the information before coming back to the **Organizational Relationships** tab and click the **Add Relationship** button again. |

Step	Action
	The **Job Data** page displays with the **Work Location** tab displayed by default.
ℹ	Cardinal will auto-assign the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for future use.
42.	The **Effective Date** field defaults to the date entered on the **Personal Information** page. Update to the first of the month of eligibility.
ℹ	If a warning message displays, review for accuracy and click the **OK** button.

Step	Action
43.	The **Action** field defaults to "Hire" and no other selections are available. *Action [Hire ▾] Reason [▾] *Job Indicator [Primary Job ▾]
44.	Click the **Reason** dropdown button and select the applicable retiree type. In this example, "Hire ORP Ret" has been selected. *Action [Hire ▾] Reason [Hir ORP Ret ▾]
ⓘ	If a warning message displays, review for accuracy and click the **OK** button. Warning -- date out of range. (15,9) The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date. [OK]
45.	Enter the retiree Position Number in the **Position Number** field ("Company Code + Retiree Type + 00"). In this example, "CWMORP00" has been selected. Position Number [CWMORP00 🔍]
ⓘ	The remaining position related fields on this page will auto-populate once the Position Number is entered and tab out of the **Position Number** field.
46.	Click the **Job Information** tab. Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation

Step	Action
	The **Job Information** page displays.
47.	Click the **Empl Class** dropdown button and select the applicable Employee Class. In this example "ORPRetiree" has been selected.
48.	Click the **Payroll** tab.

Step	Action
	The **Payroll** page displays.
49.	Click the **Pay Group Look up** icon and select "MNP" (Non-Payroll).
50.	Enter the applicable Tax Location Code in the **Tax Location Code** field.
ℹ	Other fields in the **Payroll for North America** section auto-populate based upon the selected Pay Group. Do not change.

Step	Action
51.	Click the **Compensation** tab. Work Location Job Information Job Labor **Payroll** Salary Plan Compensation

The **Compensation** page displays.

Step	Action
52.	Click the **Frequency** Look up icon and select "M" (Monthly). *Frequency M Monthly
53.	Click the **Default Pay Components** button. Default Pay Components
54.	Click the **Rate Code** Look up icon and select "State". *Rate Code 1 STATE
55.	Click the **Calculate Compensation** button. Calculate Compensation

Step	Action
56.	Click the **Benefit Program Participation** link at the bottom of the page.

The **Benefit Program Participation** page displays.

| 57. | Scroll down to the **Benefits Administration Eligibility** section and complete the following fields:

• **Elig Fld 2** (e.g., "007008000" for ORP)
• **Elig Fld 3** ("N")
• **Elig Fld 8** ("12-12")
• **Elig Fld 9** (e.g., "LS-GB") |

Step	Action
58.	Click the **OK** button. OK Cancel Apply
59.	Multiple **Warning** messages appear in a pop-up window. Click the **OK** button for each. OK Cancel
	The **Organizational Relationships** page redisplays. Biographical Details Contact Information Regional **Organizational Relationships** VA Person Info Jo Doe Person ID **Choose Org Relationship to Add** ☑ Employee ☐ Contingent Worker ☐ Person of Interest Empl Record 0 Select Checklist Code Hire ▾ ⟫ Add Relationship Save Notify Refresh Add Update/Display Include History Correct History Biographical Details	Contact Information	Regional	Organizational Relationships	VA Person Info
ⓘ	As a reminder, Cardinal has auto assigned the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for the next steps.
60.	Navigate to the **Modify a Person** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Biographical > Modify a Person**

Step	Action
	The **Personal Information Find an Existing Value Search** page displays. **Personal Information** **Find an Existing Value** ⊕ Add a New 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 ▾ ✎ Search by: Empl ID ▾ begins with [ ] ∨ Show more options ☐ Include History ☐ Correct History Search Clear ⚲ Save Search
ⓘ	If the **Modify a Person** page displays, skip to **Step 63**.
61.	Enter the Employee ID for the dependent in the **begins with** field. Search by: Empl ID ▾ begins with [ ]
62.	Click the **Search** button. Search Clear ⚲ Save Search

Step	Action
	The **Modify a Person** page displays with the **Biographical Details** tab displayed by default. ![Biographical Details screen showing Name, Biographic Information, and Biographical History sections for Jo Doe with Date of Birth 11/02/1963, Gender Female, Highest Education Level Bachelors Level Degree, Marital Status Married]
63.	Click the **VA Person Info** tab. ![Tabs: Biographical Details, Contact Information, Regional, VA Person Info (highlighted)]

Step	Action
	The **VA Person Info** page displays. Biographical Details Contact Information Regional **VA Person Info** Jo Doe Person ID _____ Power Of Attorney [_____] Linked Participant EmplID [_____] 🔍 Click here to add Other Linked Participant Details Preferred Pronoun [____ ▾] Preferred Gender [____ ▾] **Save** Return to Search Notify Refresh Add Update/Display Include History Correct History Biographical Details	Contact Information	Regional	VA Person Info
64.	Validate that the retiree's Employee ID is populated in the **Linked Participant EmplID** field. If not, enter the retiree's Employee ID and click the **Save** button. Power Of Attorney [_____] Linked Participant EmplID [_____] 🔍 Click here to add Other Linked Participant Details Preferred Pronoun [____ ▾] Preferred Gender [____ ▾] **Save** Return to Search Notify Refresh Add Update/Display Include History Co
65	Navigate to the **On-Demand Event Maintenance** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

Step	Action
	The **On-Demand Event Maintenance Find an Existing Value Search** page displays.

On-Demand Event Maintenance

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 ▾] [_____]

Empl Record [= ▾] [_____]

Name [begins with ▾] [_____]

Last Name [begins with ▾] [_____]

Second Last Name [begins with ▾] [_____]

Alternate Character Name [begins with ▾] [_____]

∧ Show fewer options

☐ Case Sensitive

[Search] [Clear]

Step	Action
66.	Enter the Employee ID of the dependent just hired in the **Empl ID** field.

Empl ID [begins with ▾] [_____] |
| 67. | Click the **Search** button.

☐ Case Sensitive ☐ Include History ☐ Correct History

[Search] [Clear] |

Step	Action
	The **On-Demand Event Maintenance** page displays. **On-Demand Event Maintenance** Jo Doe Person ID ▓▓▓▓ Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action Event ID 0 Event Date Status Class Event Status Update Prepare Options Event Status Enrollment Statement Run Date **Frequency** ◉ Deduction Frequency ○ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify
68.	Click the **Show Activities** button. **Show Activities**
	The **BAS Activity** page displays in a pop-up window. Jo Doe Person ID 00865982900 Ben Record 0 **BAS Activity**

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☐	0	Manual Event	03/01/2026	0	HR2		+	−
☐	0	Job Data Change	03/01/2026	0	HIR		+	−

OK   Cancel

Step	Action
69.	Select the "HR2" **BAS Action** checkbox. **BAS Activity** 1-2 of 2 **Select / Empl Record / Action Source / Event Date / Event Effseq / BAS Action / COBRA Action** ☑ / 0 / Manual Event / 03/01/2026 / 0 / HR2 / / + − ☐ / 0 / Job Data Change / 03/01/2026 / 0 / HIR / / + −
70.	Click the **OK** button. OK Cancel
	The **On-Demand Event Maintenance** redisplays. **On-Demand Event Maintenance** Jo Doe Person ID Ben Record 0 Activity Date 03/01/2026 Source Manual Event Empl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HR2 Event ID 0 Event Date Status Class Event Status Update Prepare Options Event Status Enrollment Statement Run Date Frequency ⦿ Deduction Frequency ○ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify
71.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. Schedule/Prepare Activity

Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
72.	Click the **OK** button to close the message. OK
73.	Select the **Finalize/Apply Defaults** checkbox option. Show Plans Show Errors ☑ Finalize/Apply Defaults
74.	Click the **Validate/Finalize** button. Validate/Finalize
	The **On-Demand Event Maintenance** page redisplays with the HIR Event. **On-Demand Event Maintenance** Jo Doe Person ID ▢ Ben Record 0 Activity Date 03/01/2026 Source Job Data Change Empl Record 0 Schedule/Prepare Activity Pending Activities 1 Show Activities Action HIR Event ID 1 Event Date 03/01/2026 Status Prepared Class HR2 Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date **Frequency** ◉ Deduction Frequency ○ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N 🔍 Normal Processing Save Return to Search Notify

Step	Action
75.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event.
	Schedule/Prepare Activity
	The **On-Demand Event Maintenance** page redisplays.
	Jo Doe 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** 03/01/2026 **Status** Prepared **Class** HIR Event Status Update Prepare Options **Event Status** Open for Processing Enrollment Statement **Run Date** **Frequency** ● Deduction Frequency ○ Annual Frequency 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 🔍 Normal Processing Save Return to Search Notify
76.	Click the **Election Entry** button.
	Election Entry

Step	Action
	The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.
77.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section and select the applicable Option Code. In this example, Option Code "1" is selected – "COVA HlthAwr + Prev Den (CHA) (Single)"
78.	Click the **OK** button.

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

On-Demand Event Maintenance

Jo Doe   Person ID [redacted]   Ben Record   0

Activity Date   Source   Empl Record   0

Schedule/Prepare Activity   Pending Activities   0   Show Activities   Action

Event ID   2   Event Date   03/01/2026   Status   Entered   Class   HIR   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

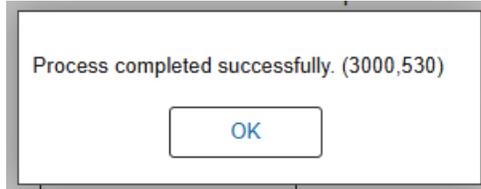Reprocess   Process Indicator   N 🔍   Normal Processing

Save   Return to Search   Notify

Step	Action
79.	Click the **Validate/Finalize** button.

Validate/Finalize

	A **Confirmation** message 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
80.	Click the **OK** button.

OK   Cancel   Apply

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

On-Demand Event Maintenance

Jo Doe   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   03/01/2026   Status   Finalized - Enrolled   Class   HIR   Event Status Update

Prepare Options   **Event Status**   Closed to Processing

Enrollment Statement   Run Date   **Frequency**

                                  ⦿ Deduction Frequency   ◯ Annual Frequency

Election Entry   Entered   0 of   0   Show Plans

Validate/Finalize   Errors   0   Show Errors   ☐ Finalize/Apply Defaults

Confirmation Statement   Run Date

Reprocess   Process Indicator   N   Normal Processing

Save   Return to Search   Notify

| | The employee is now enrolled in Medicare, the dependent (the spouse in this example) has been hired into Cardinal, linked to the retired employee, and enrolled in single coverage medical. |

Scenario 3: Under 65 Employee with Dependent Turning 65

In this scenario, the employee has "Employee + Spouse" coverage, the employee is not eligible for Medicare, but the spouse turns 65 and is eligible for Medicare. Once the Agency BA confirms that the spouse is eligible for Medicare, the BA must create a Life Event (GEM) to change the employee's coverage from "Employee + Spouse" to "Single". Then, the BA must hire the spouse and enroll the spouse in Medicare Benefits.

The Benefits Personal Data Page

After hiring the spouse and before enrolling the spouse in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

Process the Medicare Manual Event

Step	Action
1.	Navigate to the **Health Benefits** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Health Benefits**
	The **Health Benefits Find an Existing Value Search** page displays.
ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ▾] [⬚ 🔍]
3.	Click the **Search** button. ☐ Case Sensitive ☐ Include History ☐ Correct History [Search] [Clear]

The **Health Benefits** page displays for the selected employee.

Health Benefits

JOHN DOE   Employee   ID ▨▨▨   Benefit Record Number 0

Plan Type   🔍 | |< < 1 of 1 ▾ > >| | View All

Plan Type 10   Medical

Coverage   🔍 | |< < 1 of 1 ▾ > >| | View All

Coverage Begin Date 07/01/2021 ↻   Deduction Begin Date 07/01/2021 ↻

Coverage Election

⦿ Elect   ○ Waive   ○ Terminate   ↻   Election Date 09/28/2021

Benefit Program SalBenPrgm
Benefit Plan ACC5   COVA+ExDen+Out-of-ntwk+Vs&Hr   Option Code 46
Coverage Code 2   Self + Spouse
Health Provider ID   ☐ Previously Seen
Employee Status Active

[Enroll All Dependents]

Dependent/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg
05	Doe,Jo	Spouse		☐	Spouse	N

[Save] [Return to Search] [Notify] [Refresh]   [Update/Display] [Include History] [Correct History]

ℹ️	In this example, the Agency BA can see that the employee currently has a "Self + Spouse" medical coverage with their spouse covered under the current medical plan.

4.	Navigate to the **Benefits Event** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**

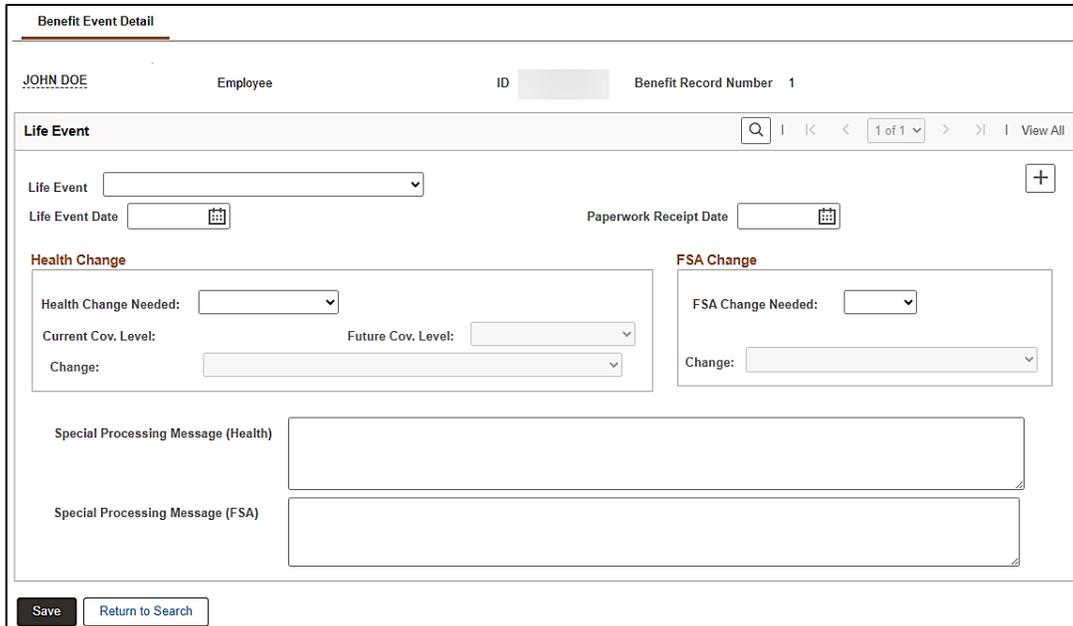| Step	Action
	The **Benefit Event Entry Find an Existing Value Search** page displays. **Benefit Event Entry** **Find an Existing Value** ⌄ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. 🕓 Recent Searches [Choose from recent searches ▾] ✎ 🔖 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]
5.	Enter the employee's Employee ID in the **Empl ID** field. **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. Empl ID [begins with ▾] [ ]
6.	Click the **Search** button. ☐ Case Sensitive ☐ Include History ☐ Correct History [Search] [Clear]

Step	Action
	The **Benefit Event Detail** page displays for the selected employee.
7.	Click the **Life Event** dropdown button and select "EE/Dep. Gained Eligibility – Medicare/Medicaid" list item.
8.	Enter the Effective Date in the **Life Event Date** field. **Note**: The Life Event Date is the first of the month in which the employee is eligible for Medicare.
9.	Enter the **Paperwork Receipt Date**.

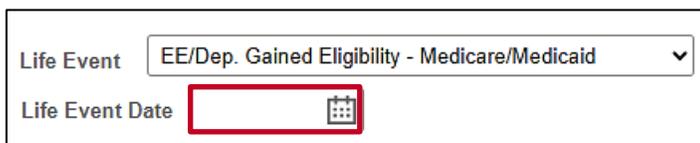| Step	Action
10.	Click the **Health Change Needed** dropdown button and select "Yes". **Health Change** Health Change Needed: [Yes]
11.	Click the **Future Cov. Level** dropdown button and select "Single, Employee". Future Cov. Level: [Single, Employee]
12.	Click the **Change** dropdown button and select "Retiree or Retiree Dependent gained Medicare Eligibility". Change: [Retiree or Retiree Dependent gained Medicare Eligibility]
13.	Click the **FSA Change** dropdown button and select "No". **FSA Change** FSA Change Needed: [No]
14.	Click the **Save** button. [Save] [Return to Search]
	A **Special Processing Message (Health)** displays with the notification that a GEM (Gain Eligibility Medicare/caid) Event has been created. Special Processing Message (Health): A GEM event will be created for you to: Enroll the retiree in Medicare or Remove the Medicare eligible dependent from existing plan or Remove the Medicare eligible dependent and change plans
🛈	Now that the GEM Event has been created, it must be processed.
15.	Navigate to the **On-Demand Event Maintenance** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

Step	Action
	The **On-Demand Event Maintenance Find an Existing Value Search** page displays. **On-Demand Event Maintenance** **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 ▾] [_____] Empl Record [= ▾] [_____] Name [begins with ▾] [_____] Last Name [begins with ▾] [_____] Second Last Name [begins with ▾] [_____] Alternate Character Name [begins with ▾] [_____] ∧ Show fewer options ☐ Case Sensitive [Search] [Clear]
16.	Enter the employee's Employee ID in the **Empl ID** field. **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. Empl ID [begins with ▾] [_____]
17.	Click the **Search** button. [Search] [Clear]

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

Step	Action
18.	Click the **Show Activities** button.

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

Step	Action
19.	Click the **OK** button.

![Cardinal logo]

Step	Action
	The **On-Demand Event Maintenance** page redisplays. **On-Demand Event Maintenance** JOHN DOE Person ID Ben Record 0 Activity Date 02/01/2026 Source Manual Event Empl Record 0 [Schedule/Prepare Activity] Pending Activities 1 [Show Activities] Action GEM Event ID 0 Event Date Status Class [Event Status Update] [Prepare Options] Event Status [Enrollment Statement] Run Date **Frequency** ◉ Deduction Frequency ○ Annual Frequency [Election Entry] Entered 0 of 0 [Show Plans] [Validate/Finalize] Errors 0 [Show Errors] ☐ Finalize/Apply Defaults [Confirmation Statement] Run Date [Reprocess] Process Indicator N Normal Processing [Save] [Return to Search] [Notify]
20.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. [Schedule/Prepare Activity]
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) [OK]
21.	Click the **OK** button to close the message. [OK]

Step	Action
	The **On-Demand Event Maintenance** page redisplays. **On-Demand Event Maintenance** JOHN DOE Person ID Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 5 Event Date 02/01/2026 Status Prepared Class GEM Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date **Frequency** ⦿ Deduction Frequency ○ Annual Frequency Election Entry Entered 0 of 2 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N 🔍 Normal Processing Save Return to Search Notify
22.	Click the **Election Entry** button. **Election Entry**

Step	Action
	The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.
23.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section.

Step	Action
	The **Look Up Option Code** page displays in a pop-up window.

Look Up Option Code ✕

Help

Cancel

Search Results

View 100 |< < 1-49 of 49 ∨ > >|

Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1

Step	Action
24.	Select the applicable Option Code. In this example, **Option Code** "1" is selected.

Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1

The **Plan Type 10: Medical** section redisplays with the selected Option Code displayed.

Plan Type 10 : Medical

Option Code 1 🔍

COVA HlthAwr + Prev Den (CHA) (Single)

Step	Action
25.	Before removing the spouse, make sure to record all the personal information for the new hire process (e.g., Date of Birth, Full Name, Address, etc.). This information can be obtained from the **Dependents / Beneficiaries** page. Event / Participant Selection Option Election Dependents / Beneficiaries
26.	Click the **Delete Row** (-) icon to remove the spouse. **Dependents/Beneficiaries** <table><tr><td>*ID</td><td>Name</td><td>Relationship to Employee</td><td>Health Provider ID</td><td>Previously Seen</td><td>Covered Person Type</td><td>Age Limit Flag</td><td></td></tr><tr><td>05</td><td>JO DOE</td><td>Spouse</td><td></td><td>☐</td><td>Spouse</td><td>☐</td><td>—</td></tr></table>
ℹ	Optionally, users can click the **Enroll All** button to remove the spouse. **Dependents/Beneficiaries** Enroll All
	A **Warning** message displays in a pop-up window when the row is manually deleted. Delete current/selected rows from this page? The delete will occur when the transaction is saved. OK Cancel
27.	Click the **OK** button. OK Cancel

Step	Action
	The **Option Election** page redisplays with spouse removed from the **Dependents/Beneficiaries** section. **BenAdmin Data Entry** Event / Participant Selection Option Election Dependents / Beneficiaries Sched ID EM00 Empl ID ___ JOHN DOE Ben Record 0 Event ID 5 Event Data 02/01/2026 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits Available Plans and Options ⓘ 1 of 2 Plan Type 10 : Medical Option Code 1 COVA HlthAwr + Prev Den (CHA) (Single) 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	
---	---	---	---	---	---	---	---
				☐		☐	—	
28.	Click the **OK** button. OK Cancel Apply

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

Step	Action
29.	Click the **Validate/Finalize** button.

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

Step	Action
30.	Click the **OK** button to close the message.

Step	Action
	The **On-Demand Event Maintenance** redisplays.

On-Demand Event Maintenance

JOHN DOE   Person ID _____   Ben Record   0

Activity Date   Source   Empl Record   0

Schedule/Prepare Activity   Pending Activities   0   Show Activities   Action

Event ID   5   Event Date   02/01/2026   Status   Finalized - Enrolled   Class   GEM   **Event Status Update**

Prepare Options   Event Status   Closed to Processing

Enrollment Statement   Run Date   **Frequency**

◉ Deduction Frequency ○ Annual Frequency

Election Entry   Entered   0 of   0   **Show Plans**

Validate/Finalize   Errors   0   Show Errors   ☐ Finalize/Apply Defaults

Confirmation Statement   Run Date

Reprocess   Process Indicator   N

Normal Processing

Save   Return to Search   Notify
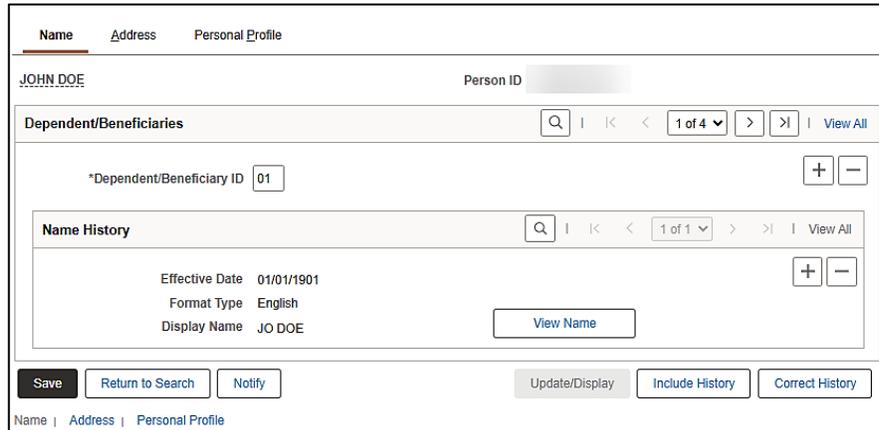
![Cardinal logo]

Hire the Spouse as an Employee

Now that the employee's benefit election has been updated to "Single", the Agency BA must now hire the spouse as an employee in Cardinal.
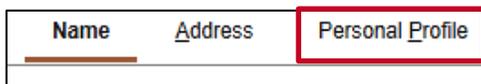
Step	Action
1.	Navigate to the **Update Dependent/Beneficiary** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary**
	The **Update Dependent/Beneficiary Find an Existing Value Search** page displays.
ⓘ	For more information pertaining 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**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **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.
3.	Click the **Search** button.

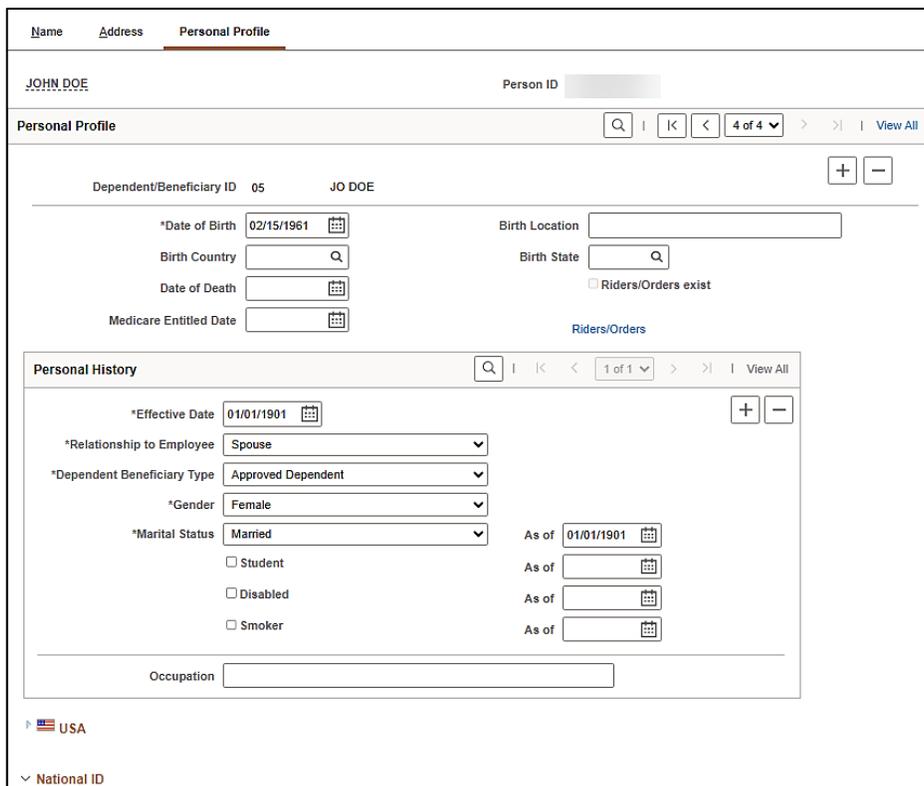| Step	Action
	The **Update Dependent/Beneficiary** page displays for the selected employee with the **Name** tab displayed by default.
4.	Click the **Personal Profile** tab.
	The **Personal Profile** page displays.

Step	Action
5.	Click the **Show next row** arrow until you reach the Personal Profile for the spouse. 〈 1 of 4 ⌄ 〉 〉| | View All
6.	Confirm that the information on this page is accurate for the spouse. **Note**: This information will be used to hire the dependent as an employee.
7.	Click the **Address** tab to review the Address information for the spouse. Name Address Personal Profile

The **Address** page for the spouse displays.
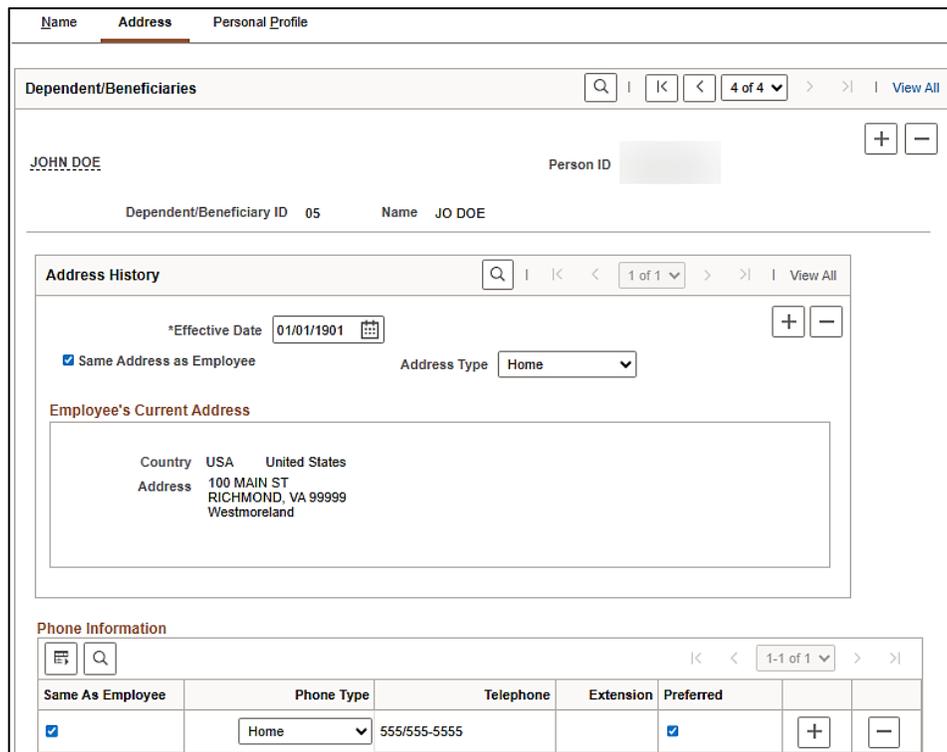
Step	Action
8.	Confirm that the information on this page is accurate for the dependent. **Note**: This information will be used to hire the dependent as an employee.
9.	Navigate to the **Add a Person** page using the following path: **NavBar > Menu > Workforce Administration > Personal Information > Add a Person**

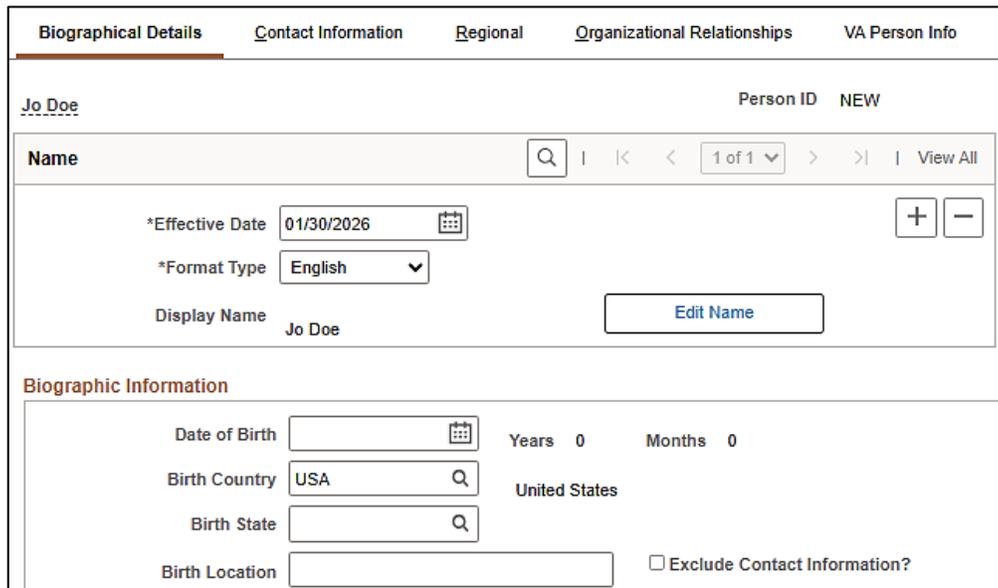| Step	Action
	The **Add a Person** page displays.
10.	Click the **Add Person** button.
	The **Modify a Person** page displays with the **Biographical Detail** tab displayed by default.
11.	The **Effective Date** field defaults to the system date. If the hire date is prior to system date, update to the hire date. **Note**: The system will not allow a future Effective Date on the **Modify a Person** page. However, this can be done on the **Job Data** page. For further information on Effective Dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.

Step	Action
12.	Click the **Add Name** button. Add Name
	The **Name** page displays in a pop-up window. **Name** ✕ Help **English Name Format** Name Prefix ▾ *First Name [_____] Middle Name [_____] *Last Name [_____] Name Suffix ▾ Display Name Formal Name Name OK　　Cancel　　Refresh Name
13.	Optionally, click the **Name Prefix** dropdown button and select the applicable prefix. Name Prefix ▾
14.	Enter the dependent's first name in the **First Name** field (required). *First Name [_____]
15.	Optionally, enter the dependent's middle name in the **Middle Name** field. Middle Name [_____]
🛈	Do not add a period behind the middle initial.
16.	Enter the dependent's last name in the **Last Name** field (required). *Last Name [_____]

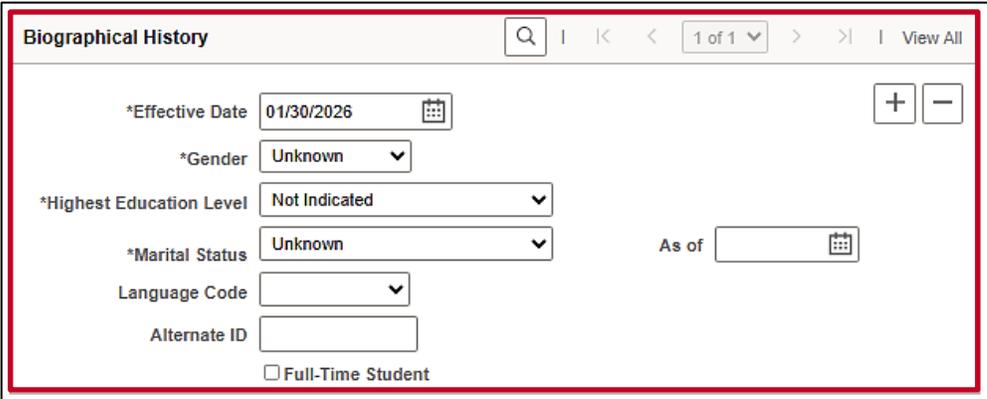| Step	Action
(i)	Do not include suffixes (Jr, Sr, or IV) in the **Last Name** field.
17.	Click the **Name Suffix** dropdown button and select the applicable suffix as needed. Name Suffix [v]
18.	Click the **OK** button. [OK] [Cancel] [Refresh Name]
	The **Modify a Person** page refreshes. Biographical Details Contact Information Regional Organizational Relationships VA Person Info Jo Doe Person ID NEW Name [🔍] I I< < [1 of 1 v] > >I I View All *Effective Date [01/30/2026] [📅] [+] [−] *Format Type [English v] Display Name Jo Doe [Edit Name] **Biographic Information** Date of Birth [ ] [📅] Years 0 Months 0 Birth Country [USA 🔍] United States Birth State [🔍] Birth Location [ ] ☐ Exclude Contact Information?
19.	Scroll down to the **Biographic Information** section. **Biographic Information** Date of Birth [ ] [📅] Years 0 Months 0 Birth Country [USA 🔍] United States Birth State [🔍] Birth Location [ ] ☐ Exclude Contact Information?

Step	Action
20.	Click the **Date of Birth Calendar** icon and select the dependent's date of birth (required). **Note**: the **Birth Countr**y field defaults to "USA". This can be updated but is not required as this data is not reported. **Biographic Information** Date of Birth [　　　　📅] Birth Country [USA　　🔍]
21.	Scroll down to the **Biographical History** section. **Biographical History** 🔍 ❘ ❘< < 1 of 1 ∨ > >❘ ❘ View All *Effective Date [01/30/2026 📅] [＋] [－] *Gender [Unknown ∨] *Highest Education Level [Not Indicated ∨] *Marital Status [Unknown ∨] As of [　　📅] Language Code [　∨] Alternate ID [　　　] ☐ Full-Time Student
🛈	The **Effective Date** field within this section defaults to the effective date selected above. Do not change.
22.	Click the **Gender** dropdown button and select the dependent's gender. **Note**: This field is a required field for benefits and payroll purposes and must provide the dependent's legal gender. This is not to be confused with the optional **Preferred Gender** field located on the **VA Person** Info tab. *Gender [Unknown ∨]
23.	Click the **Marital Status** dropdown button and select the dependent's legal marital status. *Marital Status [Unknown ∨]
🛈	The **Language Code**, **Alternate ID**, and **Full-Time Student** fields are not currently tracked or used in Cardinal.

Step	Action
24.	Scroll down to the **National ID** section.
25.	Enter the employee's Social Security Number (SSN) in the **National ID** field. **Note**: It is not necessary to enter dashes. When tabbing out of the field, the appropriate format will auto-populate.
26.	Click the **Contact Information** tab at the top of the page or the **Contact Information** link at the bottom of the page.

The **Contact Information** page displays.

Step	Action
27.	Click the **Add Address Detail** link. Add Address Detail

	The **Address History** page displays. **Address History** Address Type Home **Address History** 🔍 I I< < 1 of 1 ∨ > >I *Effective Date 01/30/2026 🗓 Address Country USA 🔍 *Status A 🔍 Add Address OK Cancel Refresh
ⓘ	The **Effective Date** field within this section defaults to the date previously selected. Do not change.
ⓘ	An **Address Type** of "Home" is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information.
28.	Click the **Add Address** link. *Status A 🔍 Add Address

Step	Action
	The **Edit Address** page displays. **Edit Address** Country United States Address 1 [ ] Address 2 [ ] Address 3 [ ] City [ ] State [🔍] Postal [ ] County [ ] [OK] [Cancel]
29.	Click the **OK** button. [**OK**] [Cancel]
	The **Address History** page refreshes. **Address History** Address Type Home **Address History** 🔍 | |< < 1 of 1 ∨ > >| *Effective Date 01/30/2026 📅 Address 100 Main St Richmond, VA 99999 Country USA 🔍 [+] [−] *Status A 🔍 Add Address [OK] [Cancel] [Refresh]
30.	Click the **OK** button. [**OK**] [Cancel] [Refresh]

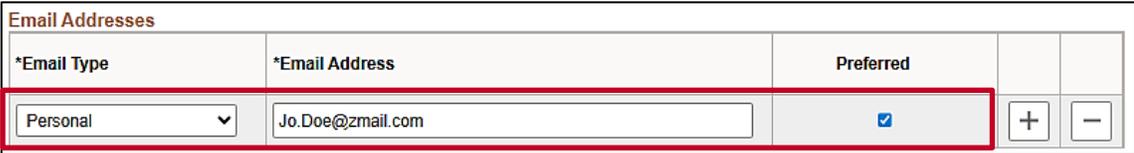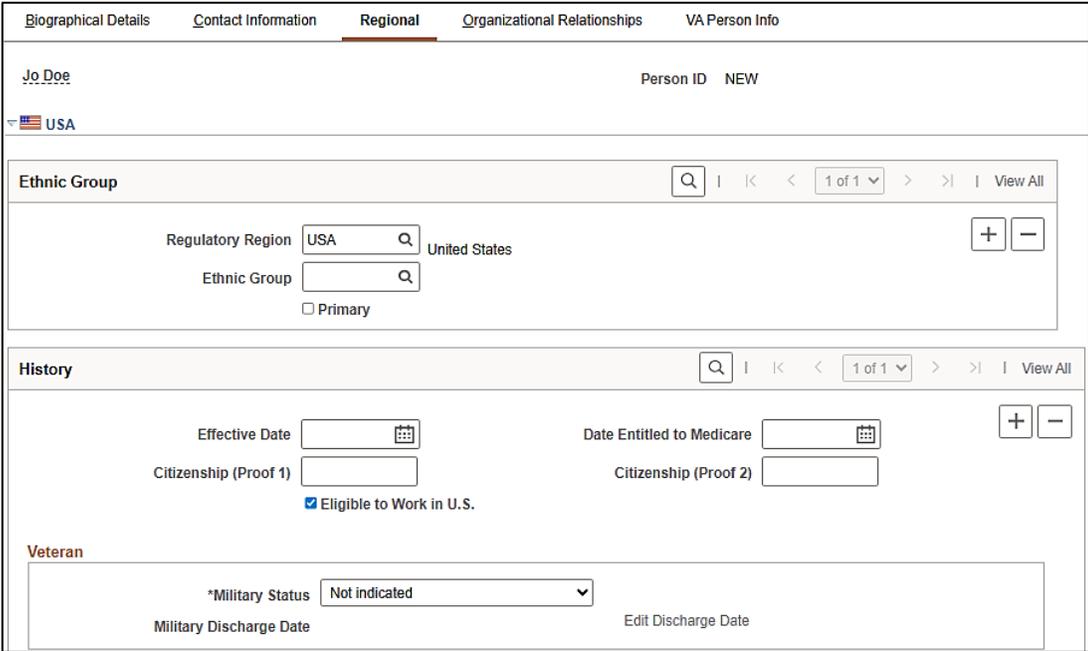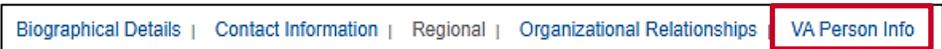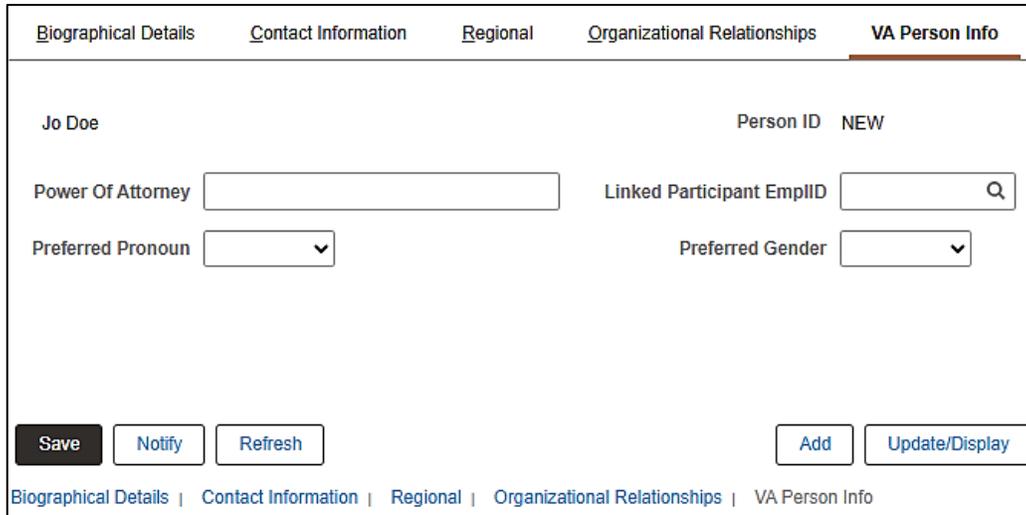| Step	Action
	The **Contact Information** page redisplays.
31.	Click the **Phone Type** dropdown button and select the type of phone.
32.	Enter the applicable telephone number in the **Telephone** field.
(i)	It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.
33.	Click the **Preferred** checkbox option to identify the dependent's preferred phone number.

Step	Action
34.	Add additional phone numbers for the employee as needed by clicking the **Add a New Row** icon (**+**) and then repeating **Steps 31 – 33**.
35.	Scroll down to the **Email Option Selection** and **Email Addresses** sections.
36.	Select the **Employee Provided Email** radio button option in the **Email Option Selection** section.
37.	Complete the following information for the dependent: • Click the **Email Type** dropdown button and select "Personal" • Enter the email address in the **Email Address** field • Select the **Preferred** checkbox option
ℹ️	When no email address is available, use **noemail@virginia.gov**. This can be replaced with a personal email address once it is obtained.

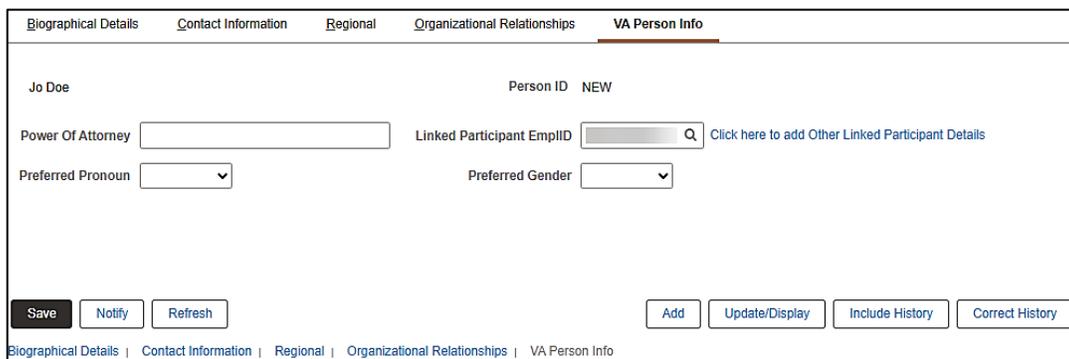| Step	Action
38.	Click the **Regional** tab at the top of the page or the **Regional** link at the bottom of the page. Biographical Details Contact Information [Regional] Organizational Relationships VA Person Info Biographical Details	Contact Information	[Regional]	Organizational Relationships	VA Person Info
	The **Regional** page displays. Biographical Details Contact Information Regional Organizational Relationships VA Person Info Jo Doe Person ID NEW ▽ 🇺🇸 USA **Ethnic Group** 🔍 | |< < 1 of 1 ∨ > >| | View All Regulatory Region USA 🔍 United States [+] [−] Ethnic Group 🔍 ☐ Primary **History** 🔍 | |< < 1 of 1 ∨ > >| | View All Effective Date [📅] Date Entitled to Medicare [📅] [+] [−] Citizenship (Proof 1) [ ] Citizenship (Proof 2) [ ] ☑ Eligible to Work in U.S. **Veteran** *Military Status [Not indicated ∨] Military Discharge Date Edit Discharge Date
ℹ️	The **Ethnic Group** field is optional, but can be entered if provided by the dependent. It may also be filled out by the dependent in Employee Self-Service. The **Regulatory Region** field defaults to "USA". Do not change. The **Veteran** field is also optional and can be entered if the dependent provided their military service and service documentation. This information is used for reporting purposes and should be entered if provided.
39.	Click the **VA Person Info** tab at the top of the page or **VA Person Info** link at the bottom of the page. Biographical Details Contact Information **Regional** Organizational Relationships [VA Person Info] Biographical Details	Contact Information	Regional	Organizational Relationships	[VA Person Info]

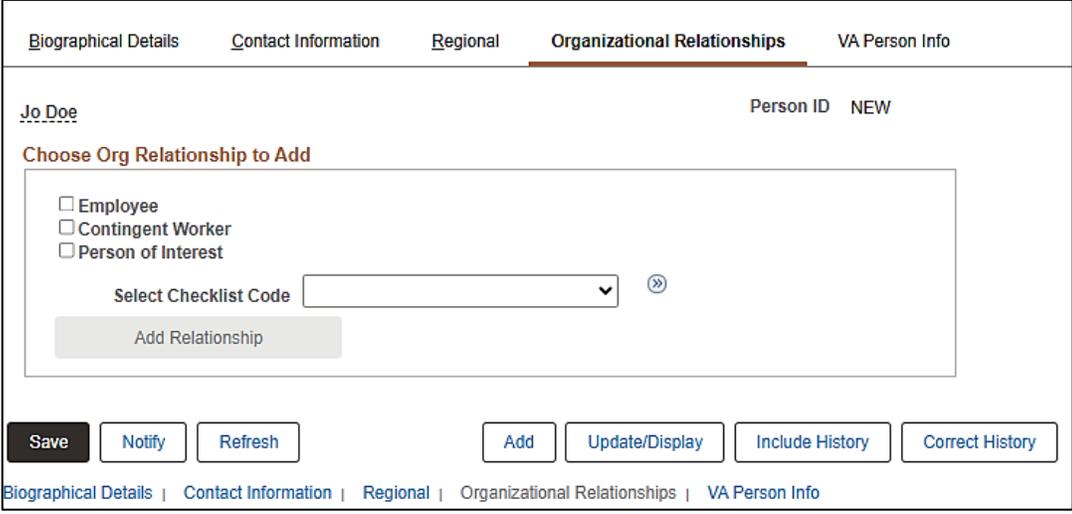| Step	Action
	The **VA Person Info** page displays.
40.	Enter the Employee ID of the employee to be linked to the dependent in the **Linked Participant EmplID** field and tab out of the field.
	The **VA Person Info** page redisplays with the **Click here to add Other Linked Participant Details** link displayed.
(i)	If more than one dependent needs to be linked, refer to the Job Aid titled **BN361 Linking Dependents and Retirees**, located on the Cardinal website under **Job Aids** in **Learning**.
41.	Click the **Organizational Relationships** tab.

Step	Action
	The **Organizational Relationships** page displays.

Step	Action
42.	Select the **Employee** checkbox option. **Note**: The **Hire** list item appears in the **Select Checklist Code** field after selecting the **Employee** checkbox option.
43.	Click the **Add Relationship** button. **Note**: Clicking the **Add Relationship** button validates all the dependent's personal data. If any required information is missing, Cardinal will generate an alert.
ⓘ	**IMPORTANT**: <u>Do not</u> click the **Back** button in the browser to go back, as all information that has been entered will be lost. Review missing information alert message, and go to the tab where the missing information is captured. Reenter the information before coming back to the **Organizational Relationships** tab and click the **Add Relationship** button again.

Step	Action
	The **Job Data** page displays with the **Work Location** tab displayed by default.
ℹ	Cardinal will auto-assign the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for future use.
44.	The **Effective Date** field defaults to the date entered on the **Personal Information** page. Update to the first of the month of eligibility.
ℹ	If a warning message displays, review for accuracy and click the **OK** button.

Step	Action
45.	The **Action** field defaults to "Hire" and no other selections are available. *Action: Hire Reason: *Job Indicator: Primary Job
46.	Click the **Reason** dropdown button and select the applicable retiree type. In this example, "Hire ORP Ret" has been selected. *Action: Hire Reason: Hir ORP Ret
ℹ	If a warning message displays, review for accuracy and click the **OK** button. Warning -- date out of range. (15,9) The date entered is either more than 30 days in the past or 30 days in the future. This is not normally true for this date. Either acknowledge that the date is OK, or correct the entered date. OK
47.	Enter the retiree Position Number in the **Position Number** field ("Company Code + Retiree Type + 00"). In this example, "CWMORP00" has been selected. Position Number: CWMORP00
ℹ	The remaining position related fields on this page will auto-populate once the Position Number is entered and tab out of the **Position Number** field.
48.	Click the **Job Information** tab. Work Location Job Information Job Labor Payroll Salary Plan Compensation

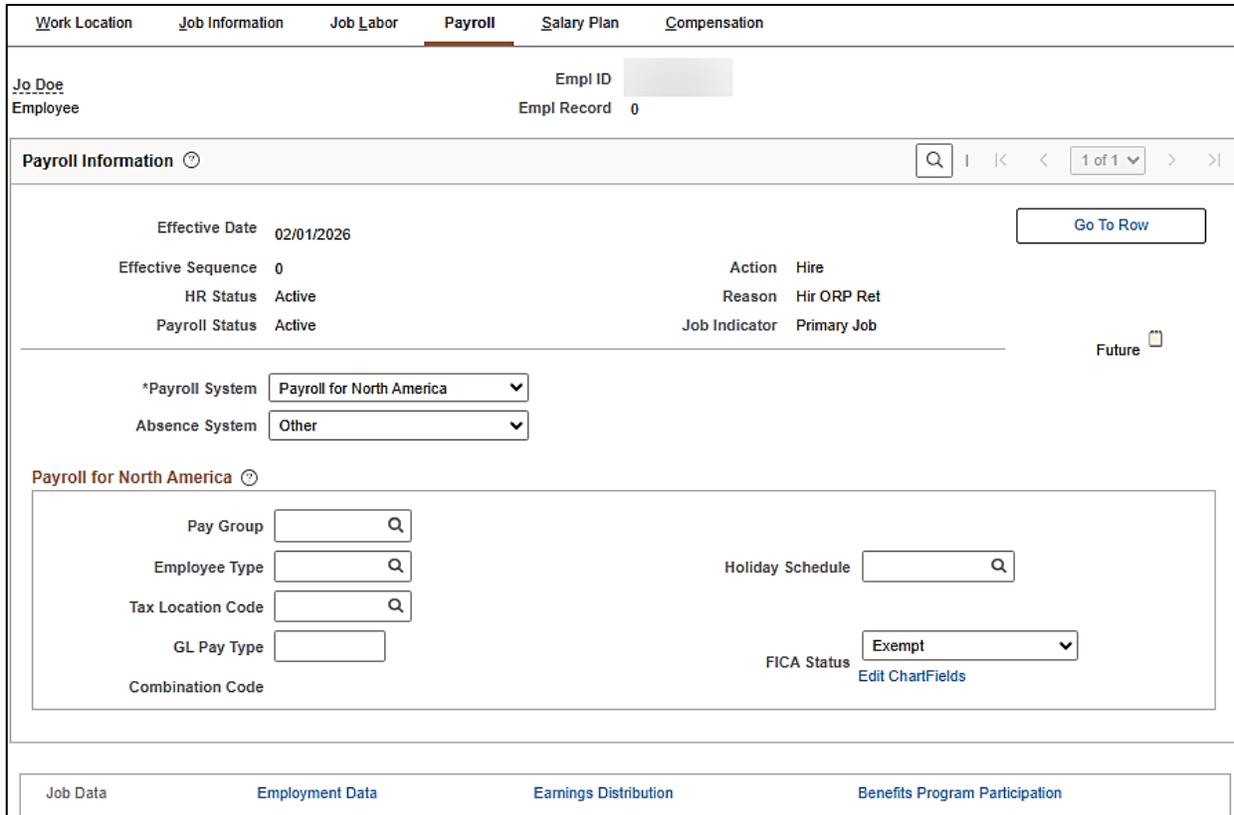| Step	Action
	The **Job Information** page displays.
49.	Click the **Empl Class** dropdown button and select the applicable Employee Class. In this example "ORPRetiree" has been selected.
50.	Click the **Payroll** tab.

Step	Action
	The **Payroll** page displays.

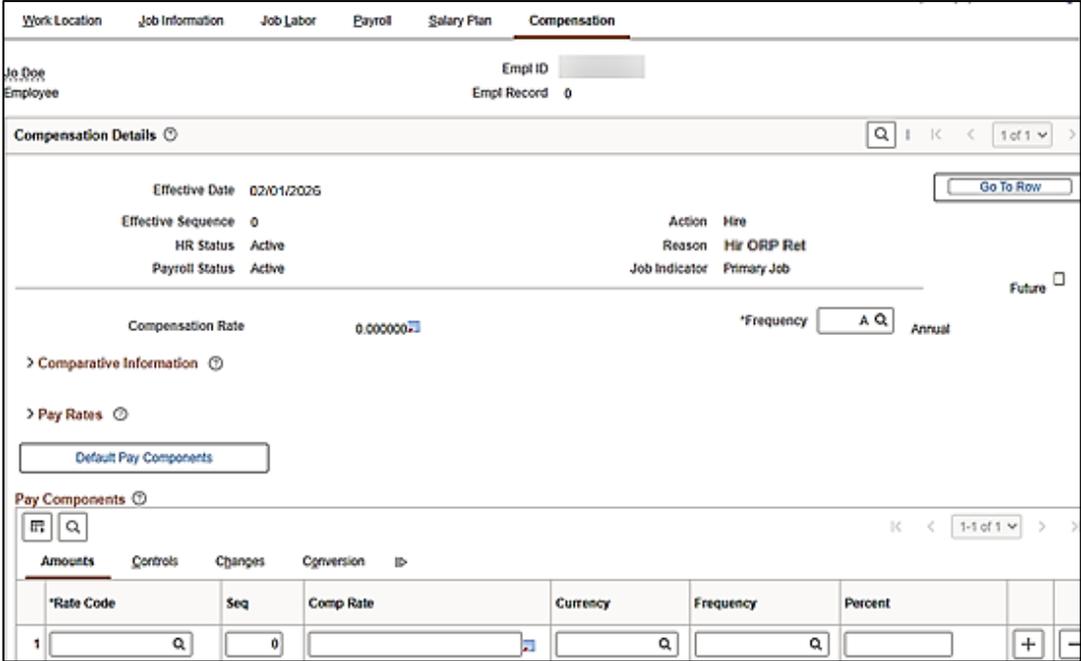| 51.	Click the **Pay Group Look up** icon and select "MNP" (Non-Payroll).

52.	Enter the applicable Tax Location Code in the **Tax Location Code** field.

ⓘ	Other fields in the **Payroll for North America** section auto-populate based upon the selected Pay Group. Do not change.

Step	Action
53.	Click the **Compensation** tab. Work Location Job Information Job Labor **Payroll** Salary Plan `Compensation`

The **Compensation** page displays.

Step	Action
54.	Click the **Frequency** Look up icon and select "M" (Monthly). *Frequency `M 🔍` Monthly
55.	Click the **Default Pay Components** button. `Default Pay Components`
56.	Click the **Rate Code** Look up icon and select "State". *Rate Code 1 `STATE 🔍`
57.	Click the **Calculate Compensation** button. `Calculate Compensation`

Step	Action
58.	Click the **Benefit Program Participation** link at the bottom of the page. Job Data Employment Data Earnings Distribution Benefits Program Participation

The **Benefit Program Participation** page displays.

Benefit Program Participation

Jo Doe   Empl ID
Employee   Empl Record   0

Benefit Status   1 of 1

Benefit Record Number   0   Go To Row
Effective Date   02/01/2026
Effective Sequence   0   Action   Hire
HR Status   Active   Reason   Hir ORP Ret
Payroll Status   Active   Job Indicator   Primary Job
     Future
*Benefits System   Benefits Administration   Benefits Employee Status   Active
Annual Benefits Base Rate   USD   ACA Eligibility Details

Benefits Administration Eligibility

BAS Group ID
Elig Fld 1   Elig Fld 2   Elig Fld 3
Elig Fld 4   Elig Fld 5   Elig Fld 6
Elig Fld 7   Elig Fld 8   Elig Fld 9

Benefit Program Participation Details   1 of 1 | View All

Effective Date   02/01/2026   Currency Code   USD
Benefit Program   PSX   Sys delivered empty Ben Pgm

Step	Action
59.	Scroll down to the **Benefits Administration Eligibility** section and complete the following fields: • **Elig Fld 2** (e.g., "007008000" for ORP) • **Elig Fld 3** ("N") • **Elig Fld 8** ("12-12") • **Elig Fld 9** (e.g., "LS-GB") Elig Fld 2 Elig Fld 3 Elig Fld 5 Elig Fld 6 Elig Fld 8 Elig Fld 9

Step	Action
60.	Click the **OK** button.
61.	Multiple **Warning** messages appear in a pop-up window. Click the **OK** button for each.

The **Organizational Relationships** page redisplays.

	As a reminder, Cardinal has auto assigned the Employee ID Number for the dependent. Make note of the Employee ID Number in the **Empl ID** field for the next steps.

| 62. | Navigate to the **Modify a Person** page using the following path:

NavBar > Menu > Workforce Administration > Personal Information > Biographical > Modify a Person |

Step	Action
	The **Personal Information Find an Existing Value Search** page displays. **Personal Information** **Find an Existing Value** ⊕ Add a New 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 ⌄ ✎ Search by: Empl ID ⌄ begins with ▢ ⌄ Show more options ☐ Include History ☐ Correct History Search Clear 🔖 Save Search
ℹ️	If the **Modify a Person** page displays, skip to **Step 65**.
63.	Enter the Employee ID for the dependent in the **begins with** field. Search by: Empl ID ⌄ begins with ▢
64.	Click the **Search** button. Search Clear 🔖 Save Search

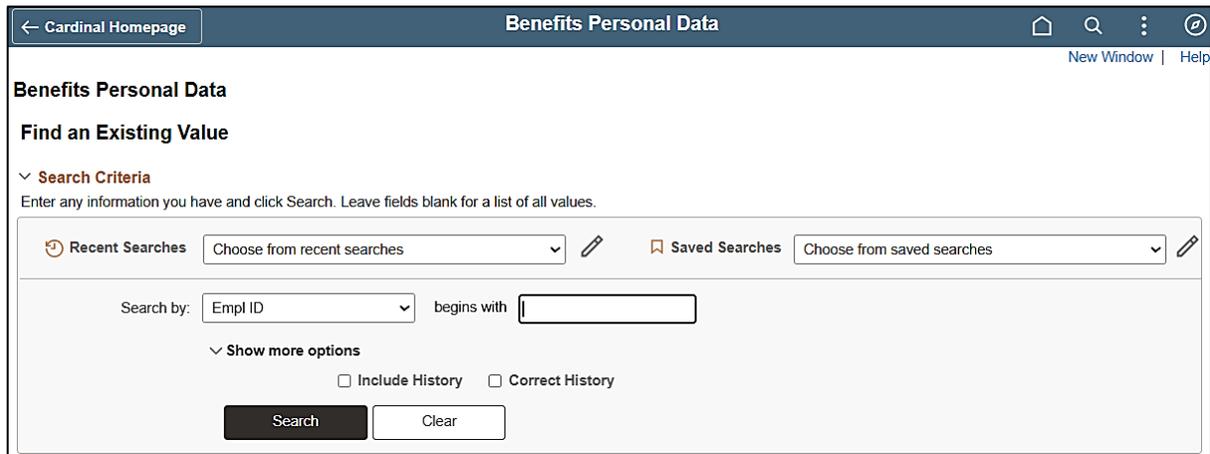| Step	Action
	The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.
65.	Click the **VA Person Info** tab.
	The **VA Person Info** page displays.

Step	Action
66.	Validate that the retiree's Employee ID is populated in the **Linked Participant EmplID** field. If not, enter the retiree's Employee ID and click the **Save** button.
67.	Click the **Save** button.

The Benefits Personal Data Page

Before enrolling the spouse in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

Step	Action
1.	Navigate to the **Benefits Personal Data** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Benefits Personal Data**
	The **Benefits Personal Data 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**.
2.	Enter the spouse's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
3.	Click the **Search** button.

Step	Action
	The **Benefits Personal Data** page displays for the spouse.
4.	Click the **Effective Date Calendar** icon in the **Benefits Personal Data – Date Sensitive** section and select the first day of the month in which the spouse is Medicare eligible.
(i)	The **Medicare Number** field will be entered by the Agency BA when received, and dashes are not accepted in the field. **Note**: Prescription coverage may be delayed until Medicare Number is provided.
5.	Select both the **Medicare A Indicator** and the **Medicare B Indicator** checkbox options. **Note**: The **Medicare D Indicator** is not used in Cardinal and should not be selected.

Step	Action
(i)	For End Stage Renal Disease, the **Medicare A**, **B**, and/or **D Indicator** checkbox options will not be checked. OHB is establishing the record for End Stage Renal Disease (ESRD).
6.	Click the **HIPAA Medicare Elig Reason** dropdown button and select either "Age" or "Disability" as the applicable HIPPA Medicare eligibility reason. **Note**: The HIPAA Medicare eligibility reason of "End Stage Renal Disease" is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary.
7.	Click the **Save** button.

Enroll the Spouse in Medicare

Once the spouse has been hired into Cardinal and linked with the employee, and Benefits Personal Data has been updated, the spouse is now eligible for Medicare benefit enrollment. The Agency BA will now navigate to the **On-Demand Event Maintenance** page and process the New Hire (HIR) benefit event for the spouse to enroll the spouse in Medicare.

Step	Action
1.	Navigate to the **On-Demand Event Maintenance** page using the following path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**
	The **On-Demand Event Maintenance Find an Existing Value Search** page displays.
2.	Enter the employee's Employee ID in the **Empl ID** field. **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.
3.	Click the **Search** button.

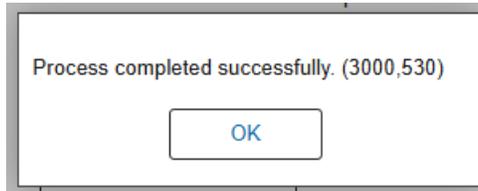| Step	Action
	The **On-Demand Event Maintenance** page displays.
4.	Click the **Show Activities** button.
	The **BAS Activity** page displays in a pop-up window.
ℹ️	Benefits Personal Data may trigger an "MSC" event. Events should be processed in the following order: "HR2", "HIR", and the "MSC" event last.

Step	Action
5.	Click the **Select** checkbox option for the "HR2" Benefit Event.

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☐	0	Benefits Person	02/01/2026	0	MSC		+	−
☑	0	Manual Event	02/01/2026	0	HR2		+	−
☐	0	Job Data Change	02/01/2026	0	HIR		+	−

Step	Action
6.	Click the **OK** button.

OK   Cancel

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

On-Demand Event Maintenance

Jo Doe   Person ID   00865982000   Ben Record   0

Activity Date   02/01/2026   Source   Manual Event   Empl Record   0

Schedule/Prepare Activity   Pending Activities   3   Show Activities   Action   HR2

Event ID   0   Event Date   Status   Class   Event Status Update

Prepare Options   Event Status

Enrollment Statement   Run Date   **Frequency**

⦿ Deduction Frequency ◯ Annual Frequency

Election Entry   Entered   0 of   0   Show Plans

Validate/Finalize   Errors   0   Show Errors   ☐ Finalize/Apply Defaults

Confirmation Statement   Run Date

Reprocess   Process Indicator   N

Normal Processing

Save   Return to Search   Notify

Step	Action
7.	Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event. This will process and close the HR2 Benefit Event. Schedule/Prepare Activity

Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
8.	Click the **OK** button to close the message. OK
	The **On-Demand Event Maintenance** page redisplays. **On-Demand Event Maintenance** Jo Doe Person ID ▊▊▊▊▊ Ben Record 0 Activity Date Source Empl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action Event ID 1 Event Date 02/01/2026 Status Prepared Class HR2 Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency ● Deduction Frequency ○ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N 🔍 Normal Processing Save Return to Search Notify
9.	Click the **Show Activities** button. Show Activities

Step	Action
	The **BAS Activity** page displays in a pop-up window.
10.	Click the **Select** checkbox option for the "HIR" Benefit Event.
11.	Click the **OK** button.
	The **On-Demand Event Maintenance** page redisplays.

Step	Action
12.	Click the **Schedule/Prepare Activity** button.
	Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.
	Schedule/Prepare Activity

A **Confirmation** message 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
13.	Click the **OK** button to close the message.
	OK

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

On-Demand Event Maintenance

Jo Doe   Person ID _____   Ben Record   0

Activity Date   02/01/2026   Source   Benefits Person   Empl Record   0

Schedule/Prepare Activity   Pending Activities   1   Show Activities   Action   MSC

Event ID   2   Event Date 02/01/2026   Status   Prepared   Class HIR   Event Status Update

Prepare Options   Event Status   Open for Processing

Enrollment Statement   Run Date   Frequency

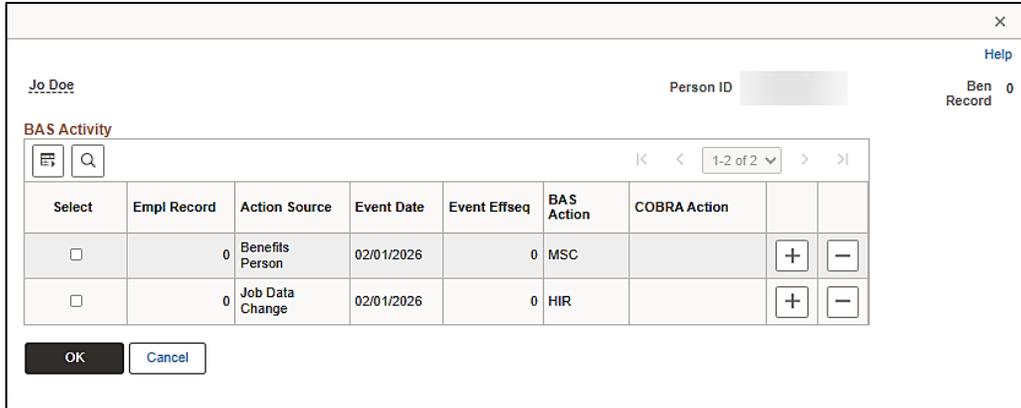   ● Deduction Frequency ○ Annual Frequency

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 Q

                                         Normal Processing

Save   Return to Search   Notify

Step	Action
14.	Click the **Election Entry** button. Election Entry

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

Step	Action
15.	Click the **Option Code Look up** icon in the **Plan Type 10: Medical** section. Plan Type 10 : Medical Option Code

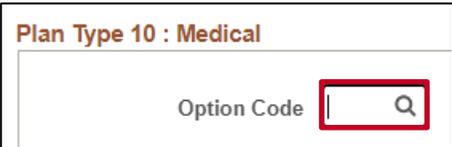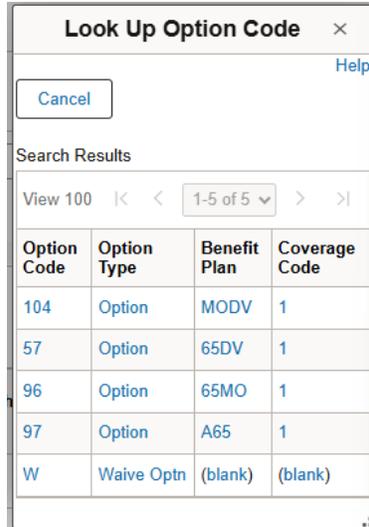| Step	Action
	The **Look Up Option Code** page displays in a pop-up window. **Look Up Option Code** ✕ Help Cancel Search Results View 100 |< < 1-5 of 5 ∨ > >| | Option Code	Option Type	Benefit Plan	Coverage Code | |---|---|---|---| | 104 | Option | MODV | 1 | | 57 | Option | 65DV | 1 | | 96 | Option | 65MO | 1 | | 97 | Option | A65 | 1 | | W | Waive Optn | (blank) | (blank) |
ℹ	If the Over 65 Benefit Plans do not populate, ensure the Medicare information was accurately entered. If the information is incorrect, update as needed and then complete an "Open" / "Assign Benefit Program" to the GEM Event to pick up the change. For additional information on re-opening and reprocessing Benefit Events, see the Job Aid titled **Re-opening and Reprocessing a Benefit Event** located on the Cardinal website in **Job Aids** under **Learning**.
16.	Select the applicable **Option Code**. In this example, **Option Code** "57" is selected. | Option Code	Option Type	Benefit Plan	Coverage Code | |---|---|---|---| | 104 | Option | MODV | 1 | | 57 | Option | 65DV | 1 | | 96 | Option | 65MO | 1 | | 97 | Option | A65 | 1 | | W | Waive Optn | (blank) | (blank) |

Step	Action
	The **Plan Type 10: Medical** section redisplays with the selected Option Code displayed.

Plan Type 10 : Medical

Option Code 57 🔍

Advan65 + RX + Den&Vision (65DV) (Single)

Health Provider ID [_____] ☐ Previously Seen

Step	Action
17.	Click the **OK** button.

OK | Cancel | Apply

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

On-Demand Event Maintenance

Jo Doe   Person ID [____]   Ben Record   0

Activity Date   02/01/2026   Source   Benefits Person   Empl Record   0

Schedule/Prepare Activity   Pending Activities   1   Show Activities   Action   MSC

Event ID   2   Event Date 02/01/2026   Status   Entered   Class   HIR   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 🔍   Normal Processing

Save | Return to Search | Notify

Step	Action
18.	Click the **Validate/Finalize** button.

Validate/Finalize

Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
19.	Click the **OK** button to close the message. OK
	The **On-Demand Event Maintenance** page redisplays. **On-Demand Event Maintenance** Jo Doe — Person ID — Ben Record 0 Activity Date 02/01/2026 — Source Benefits Person — Empl Record 0 Schedule/Prepare Activity — Pending Activities 1 — Show Activities — Action MSC Event ID 2 — Event Date 02/01/2026 — Status Finalized - Enrolled — Class HIR — Event Status Update Prepare Options — Event Status Closed to Processing Enrollment Statement — Run Date — Frequency — Deduction Frequency — Annual Frequency Election Entry — Entered 0 of 0 — Show Plans Validate/Finalize — Errors 0 — Show Errors — Finalize/Apply Defaults Confirmation Statement — Run Date Reprocess — Process Indicator N — Normal Processing Save — Return to Search — Notify
20.	Click the **Schedule/Prepare Activity** button for the "MSC" event if applicable. Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run. Schedule/Prepare Activity

![Cardinal logo]

Step	Action
	A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
21.	Click the **OK** button to close the message. OK
	The **On-Demand Event Maintenance** page redisplays. **On-Demand Event Maintenance** Jo Doe Person ID [ ] Ben Record 0 **Activity Date** **Source** **Empl Record** 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 0 Event Date Status Class Event Status Update Prepare Options Event Status Enrollment Statement Run Date **Frequency** ● Deduction Frequency ○ Annual Frequency Election Entry Entered 0 of 0 Show Plans Validate/Finalize Errors 0 Show Errors ☐ Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Normal Processing Save Return to Search Notify
ℹ️	The spouse has been hired, linked to the employee, and enrolled in Medicare.