Managing and Approving Dependents Overview

This Job Aid provides an overview of reviewing dependent information for users with **Benefits Read Only** access, as well as step-by-step instructions for an Agency Benefits Administrator to monitor dependents that are currently in an “Unapproved Dependent” status. Unapproved dependents are not covered under the employee’s selected plan coverage and must be updated to a status of “Approved Dependent” once the applicable supporting documentation is provided by the employee. Review the dependents pending approval and follow up with the employee to ensure that the supporting documentation is provided within the established timeframe.

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

- Additional dependents need to be enrolled
- Additional enrollments need to be completed
- Updates or corrections to the enrollments or dependents information are needed
- Dependents need to be updated from “Unapproved Dependent” to “Approved Dependent” when the required supporting documentation is provided by the employee
- Dependents need to be removed from the Health Plan enrollment because the documentation was not received or did not meet the eligibility requirement

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

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

Table of Contents

Revision History 3
Reviewing Dependent Information with Read Only Access 4
How to Approve a Dependent 11
How to Remove an Unapproved Dependent 25
Managing Dependent Personal Information 36

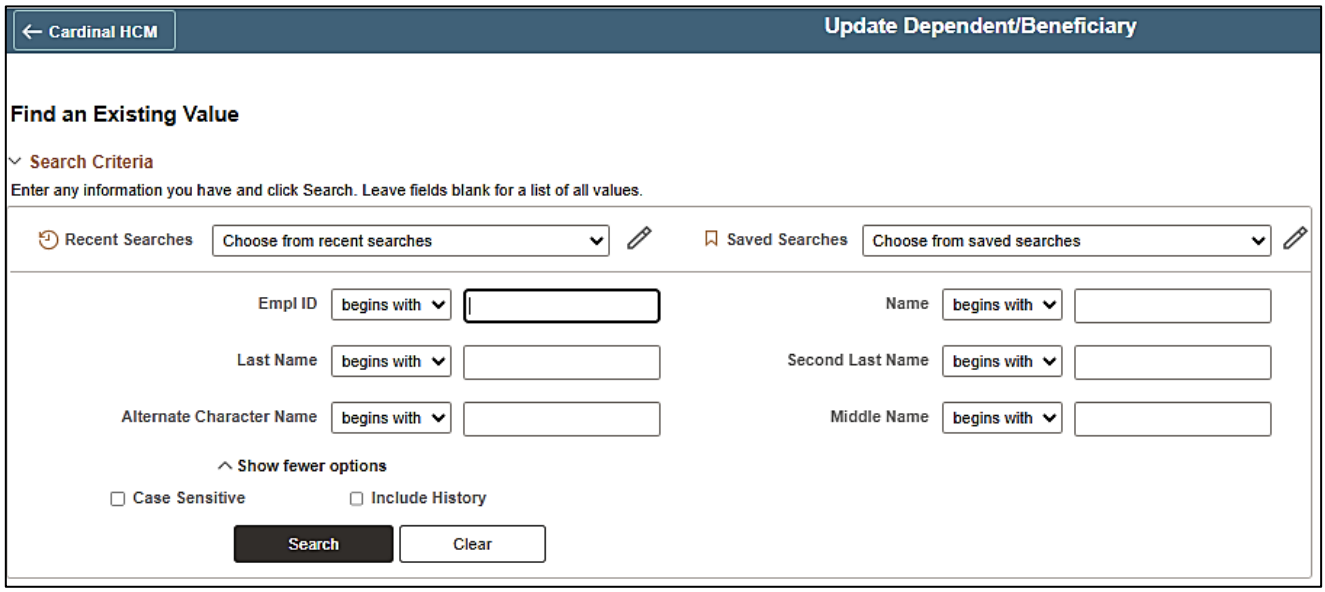
Revision History

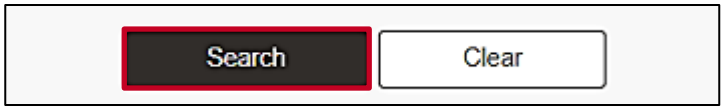
Revision Date	Summary of Changes
9/10/2026	Reviewing Dependent Information with Read Only Access section added for users with Read Only access.
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/26/2026	New section added to Job Aid - Managing Dependent Personal Information.
3/1/2025	Updated the screenshots of the Search pages. Added reference information to the **Overview of the Cardinal HCM Search Pages** Job Aid.

Reviewing Dependent Information with Read Only Access

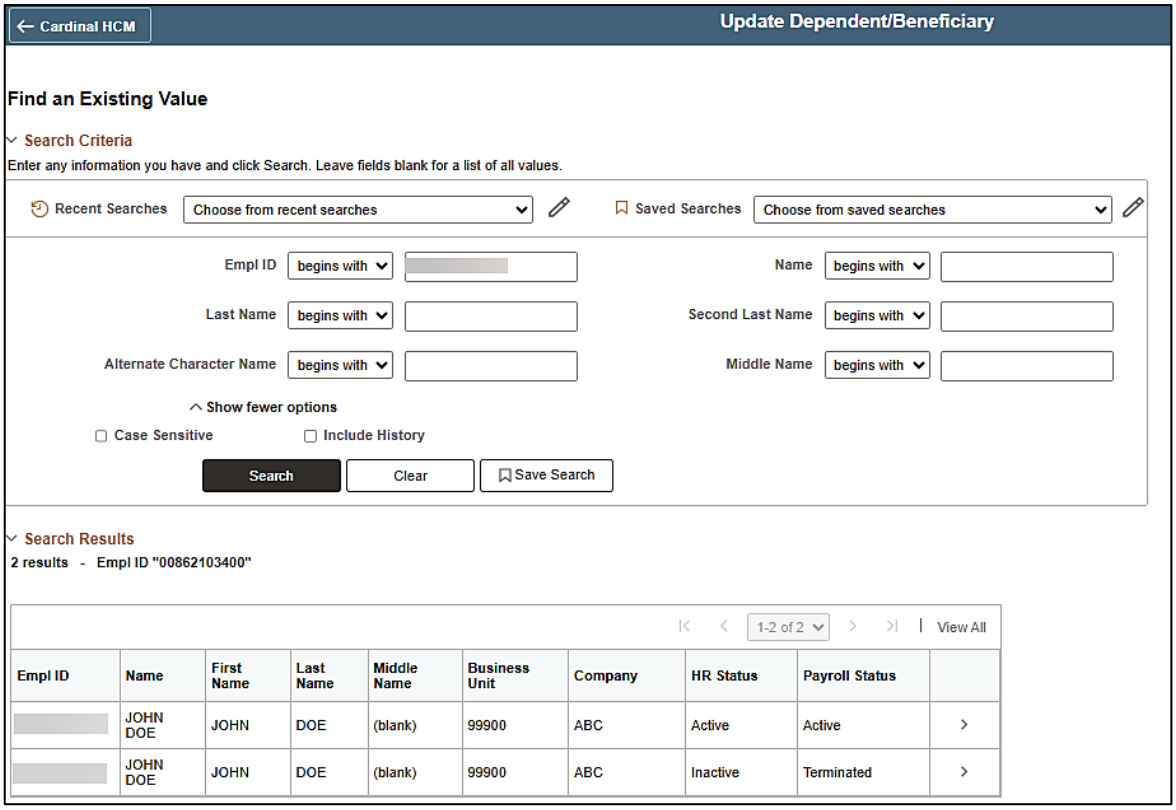
Step	Action
1.	Navigate to the **Update Dependent/Beneficiary** page using the following path: **NavBar > Menu > Benefits > Employee/Dependent Information > Update Dependent/Beneficiary**

The **Update Dependent/Beneficiary Find an Existing Value Search** page displays.

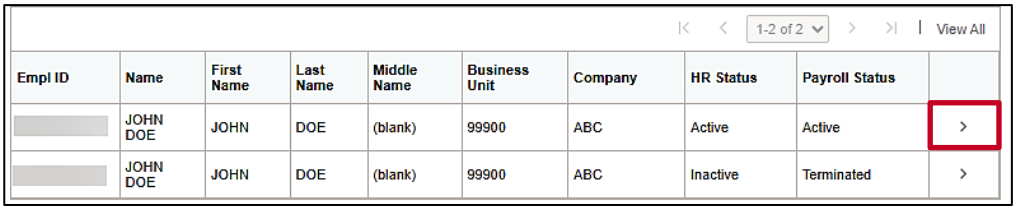


2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search by name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.
3.	Click the **Search** button. 

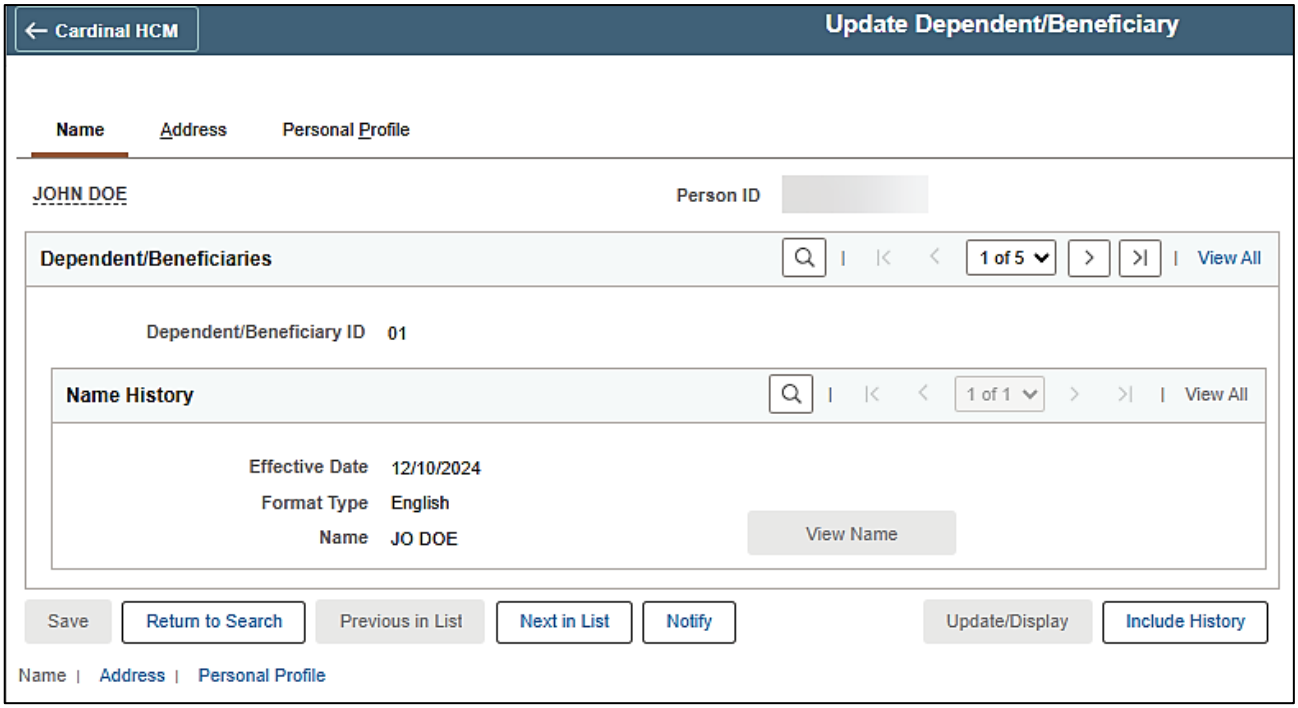
Step	Action
	The **Search Results** display at the bottom of the page.



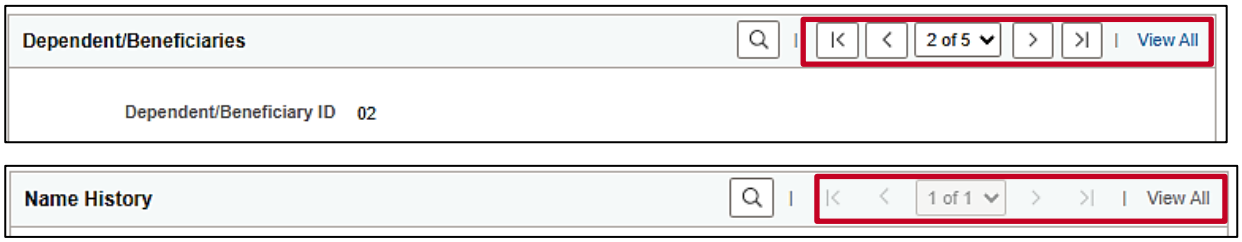
4.	Click the **Drill in** icon for the applicable Search Result.



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



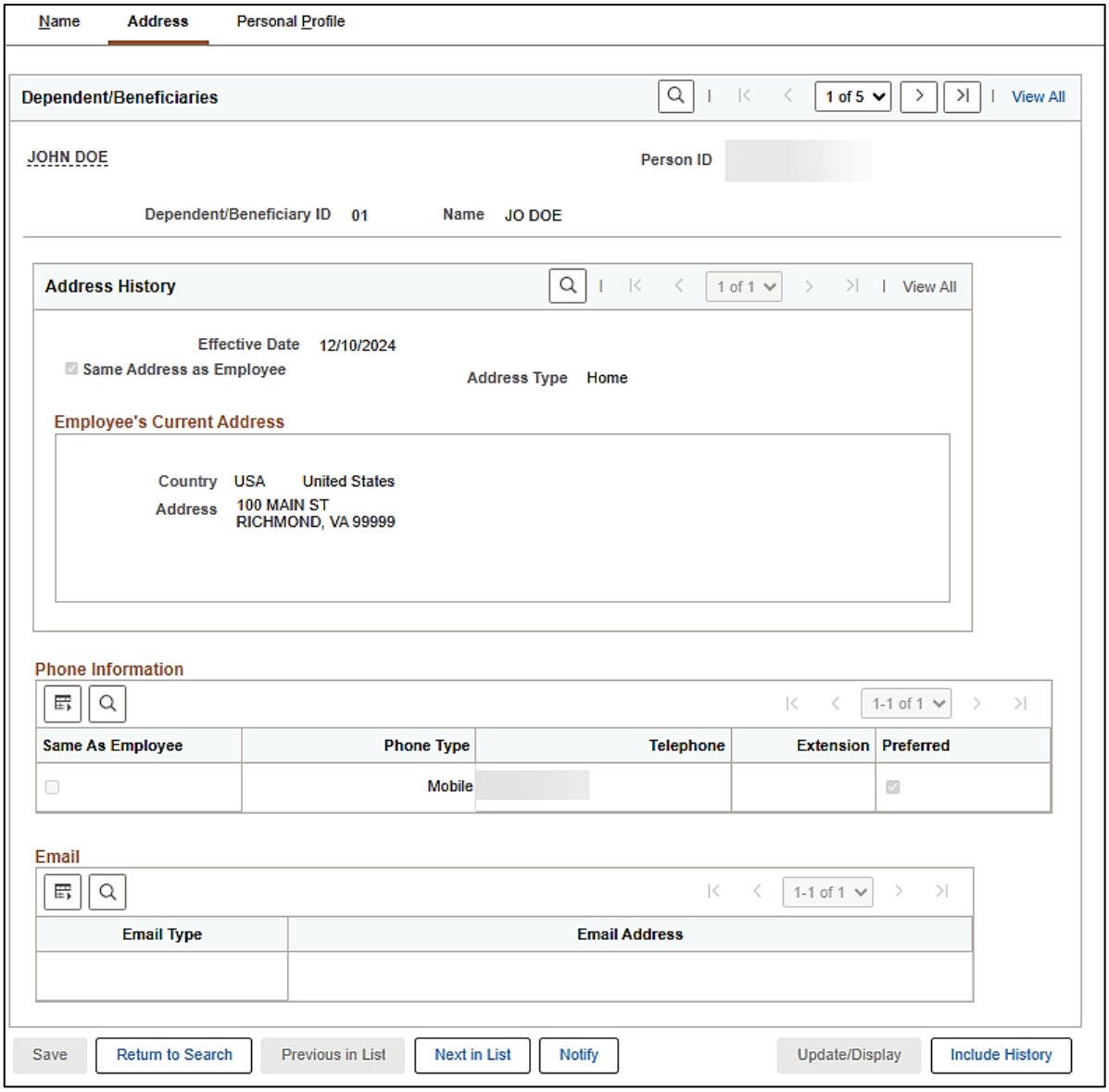
The navigational arrow buttons and the **View All** link can be used to review the names of each dependent associated with the employee and the corresponding Name History if applicable.



5. Click the **Address** tab.

Step	Action

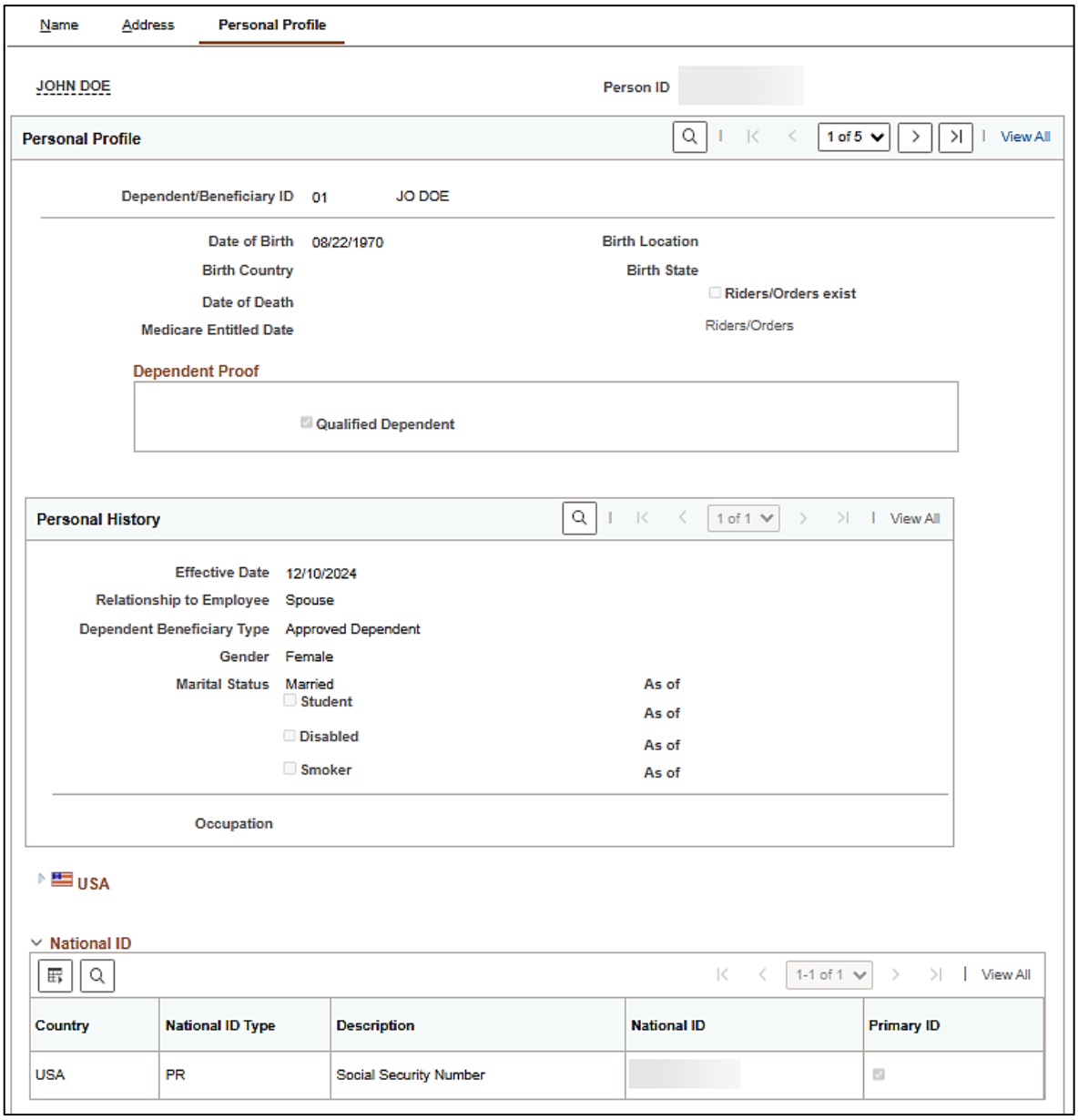
The **Address** page displays.



The navigational arrow buttons and the **View All** link can be used to review the address information for each dependent associated with the employee and corresponding Address History, Phone Information, and Email if applicable.

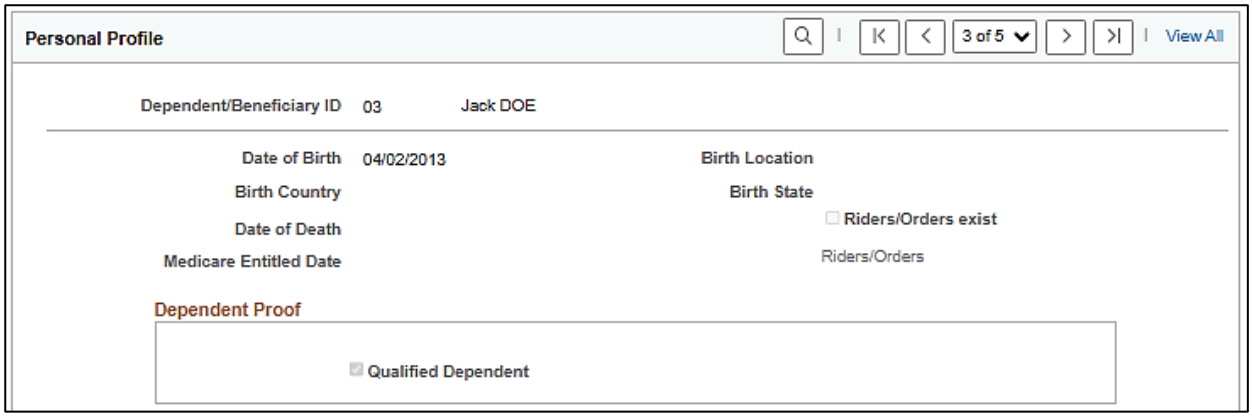
Step	Action
6.	Click the **Personal Profile** tab.

The **Personal Profile** page displays.

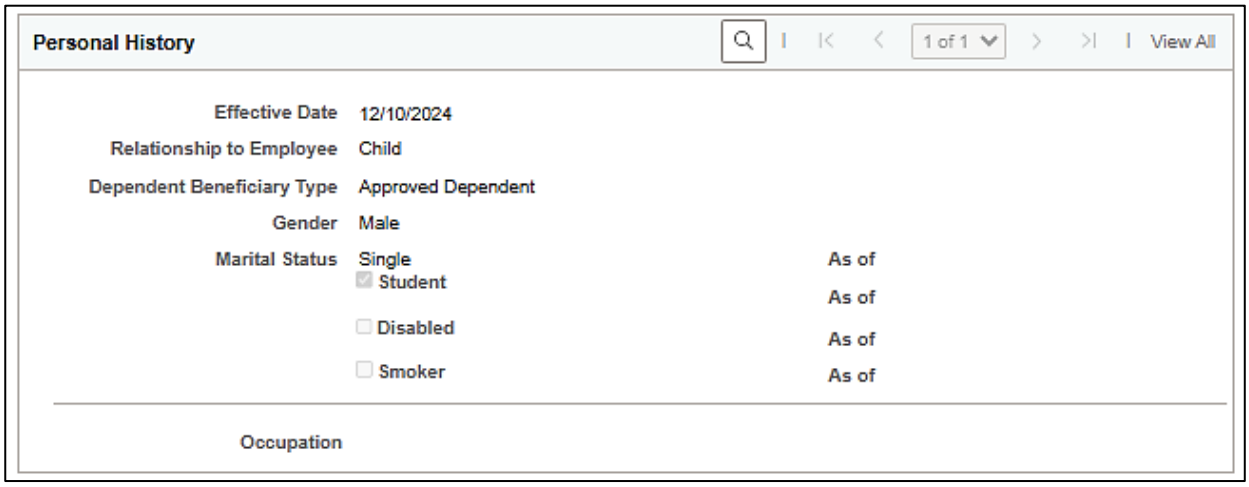


Step	Action
	The navigational arrow buttons and the **View All** link can be used to review the Personal Profile information for each dependent associated with the employee.

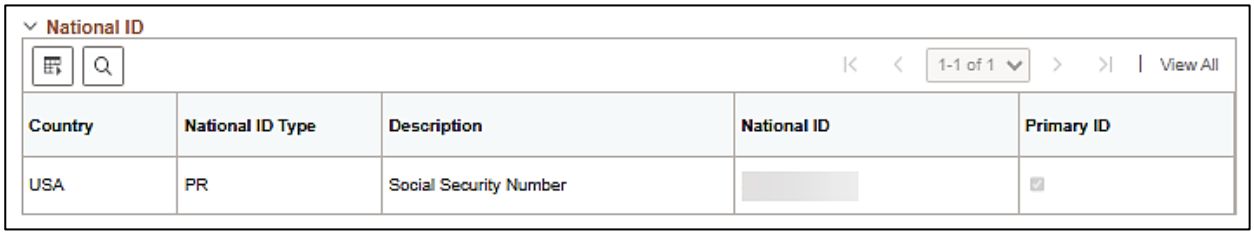
The **Personal Profile** section displays the date of birth (or death if applicable) as well as any Riders or Court Orders that may be in place.



The **Personal History** section displays the dependent's relationship to the employee, whether they are an approved dependent or not, their legal gender, and marital status if applicable.



The **National ID** section houses the Social Security Number for the dependent.

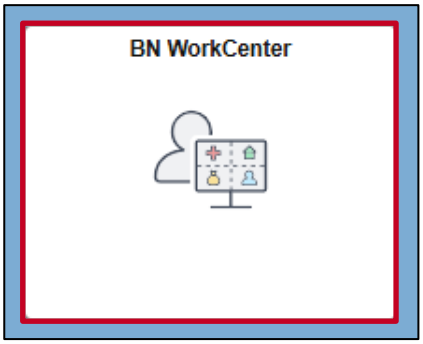
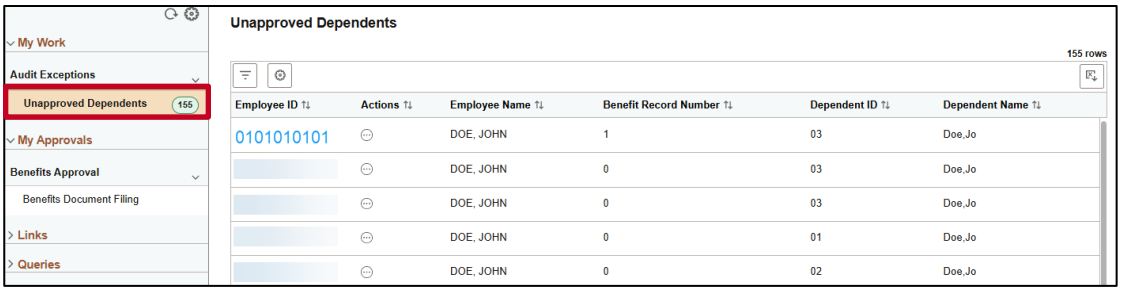


Step	Action
	Users with Read Only access will not be able to add or modify dependent information, and will notice that the **Save** button is disabled. If changes need to be made to dependent information for an employee, reach out to the Agency BN Administrator.

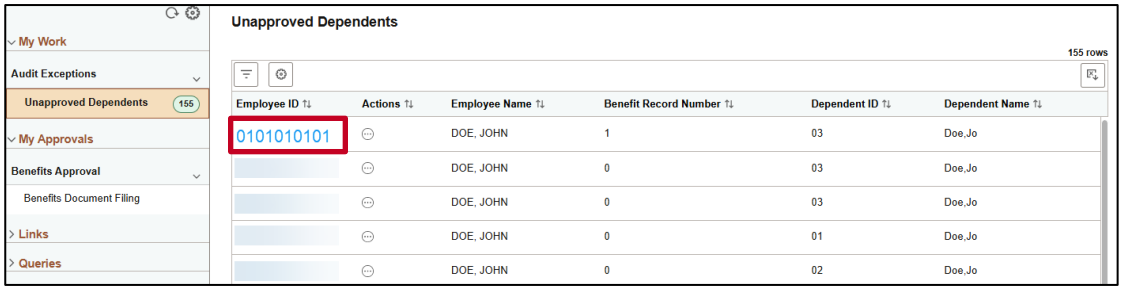
How to Approve a Dependent

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

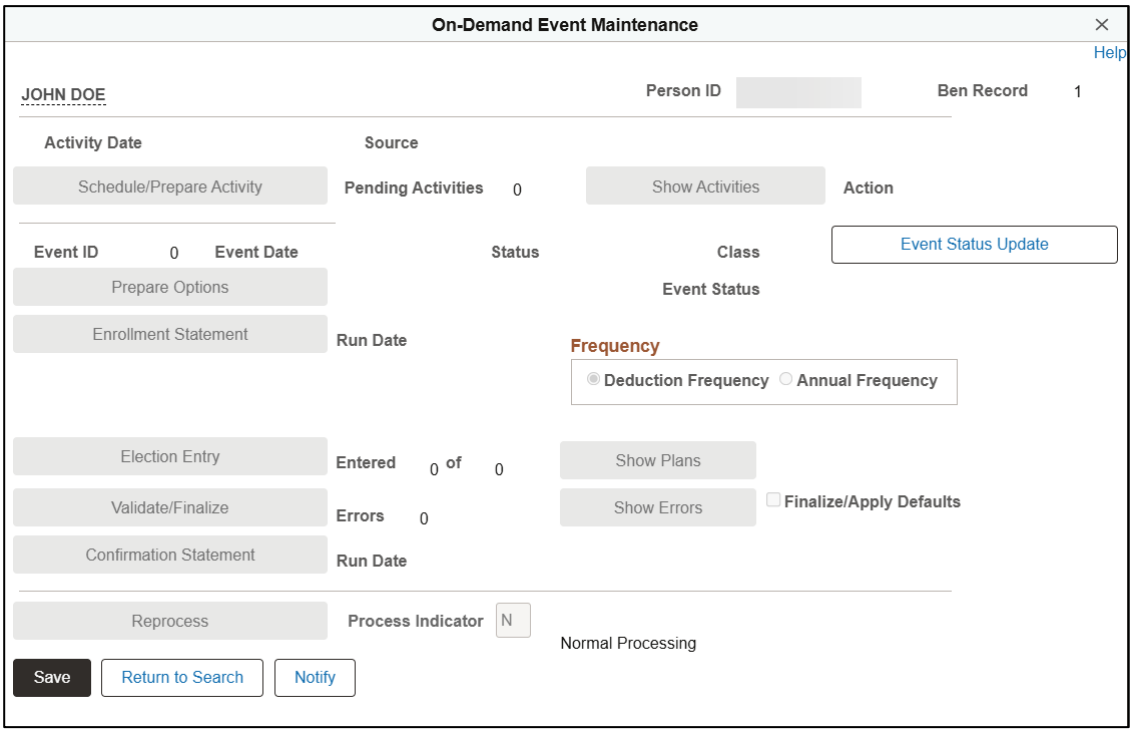
- A Life Event manually created by a Benefits Administrator
- A Job Record (e.g., hire, re-hire, etc.)
- An Open Enrollment Event including the addition of dependents to coverage with supporting documentation provided as a hard copy.

Step	Action
1.	Navigate to the **Unapproved Dependents** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **My Work > Audit Exceptions > Unapproved Dependents** **Note**: WorkCenter sections, folders, and pages may vary based on the user’s Security roles. 

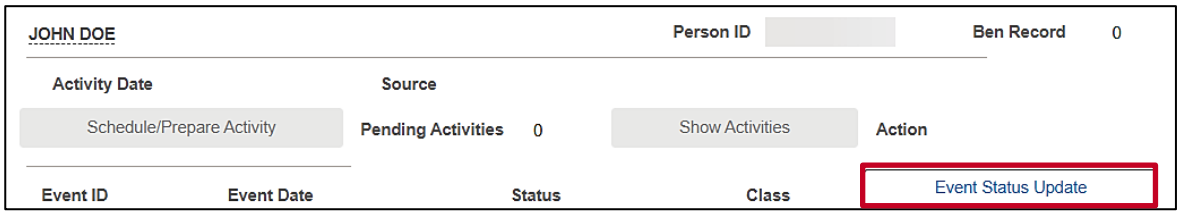
Step	Action
3.	Click the **Employee ID** link of the unapproved dependent.



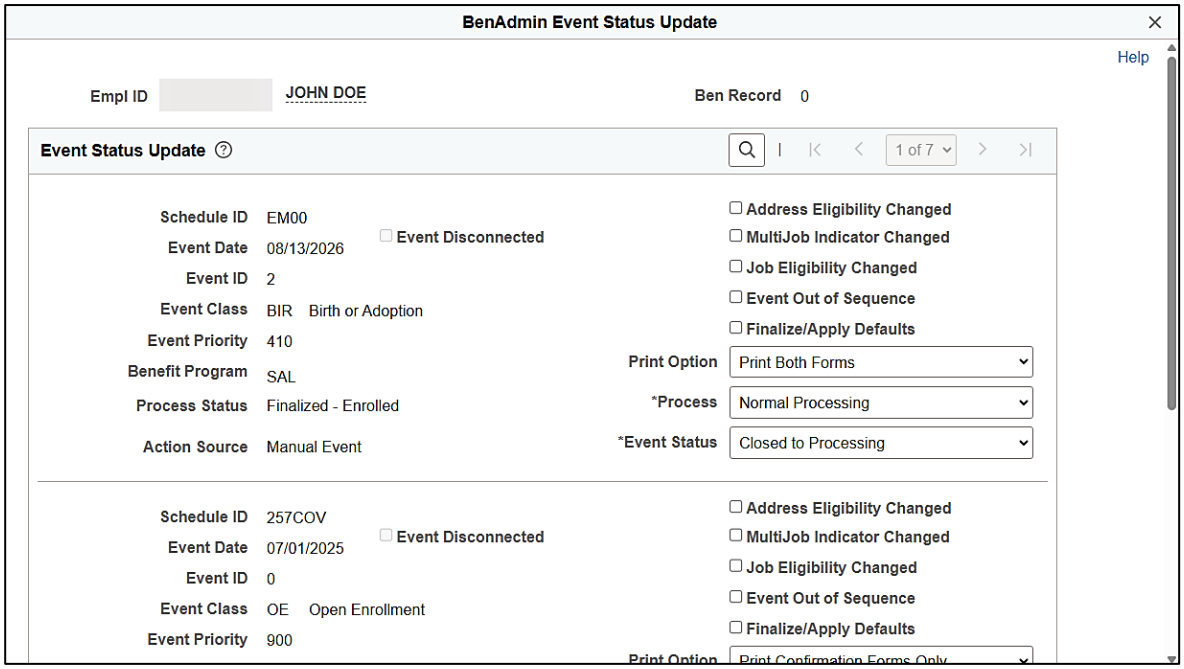
The **On-Demand Event Maintenance** page displays in a pop-up window.



4.	Click the **Event Status Update** button.

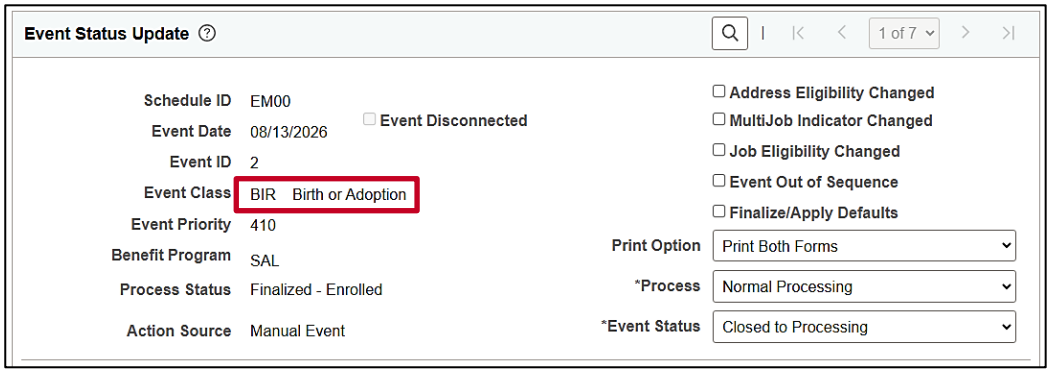


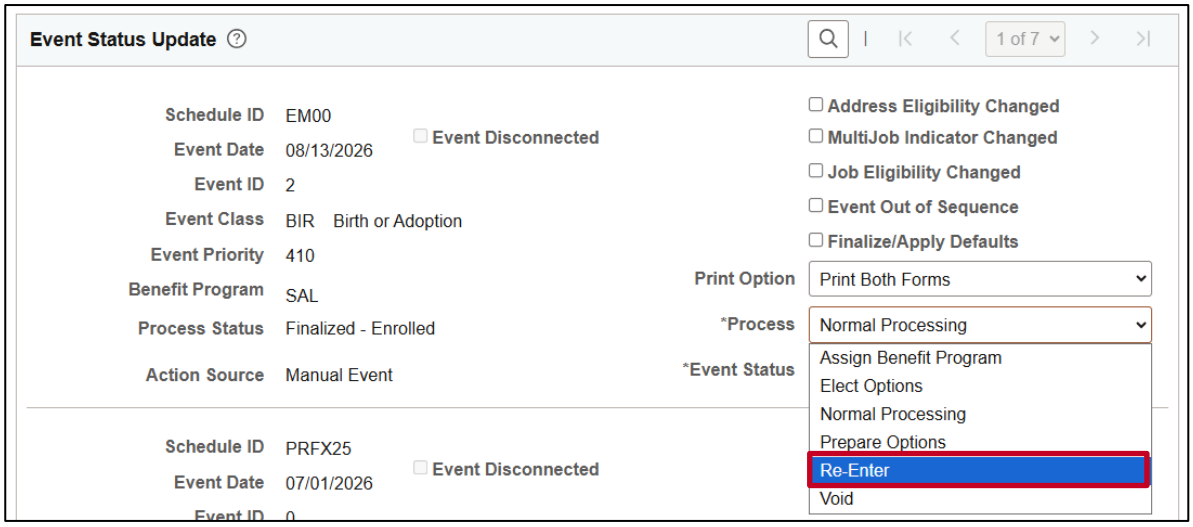
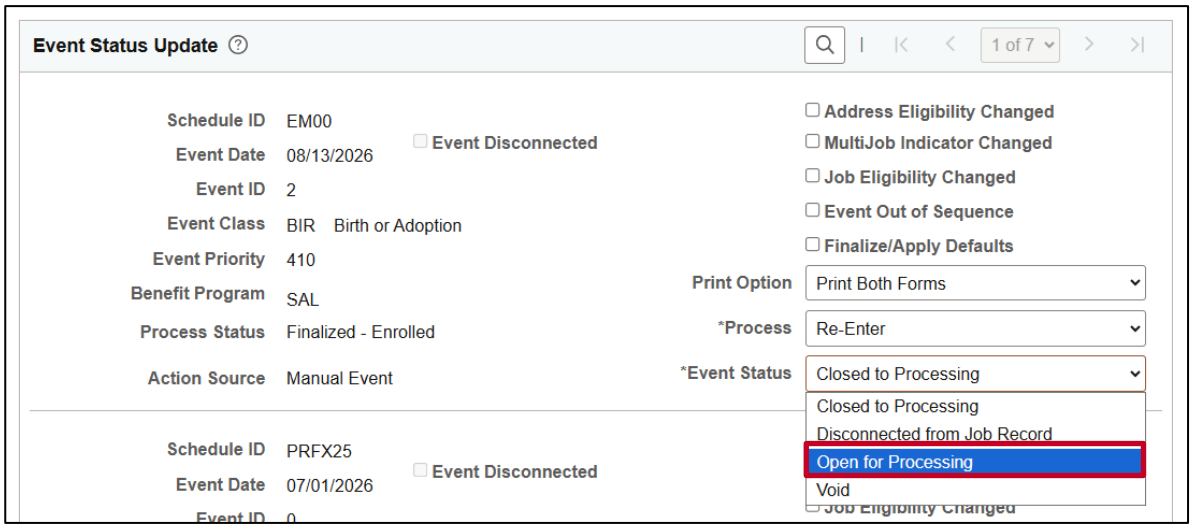
Step	Action
	The **BenAdmin Event Status Update** page displays in a pop-up window.



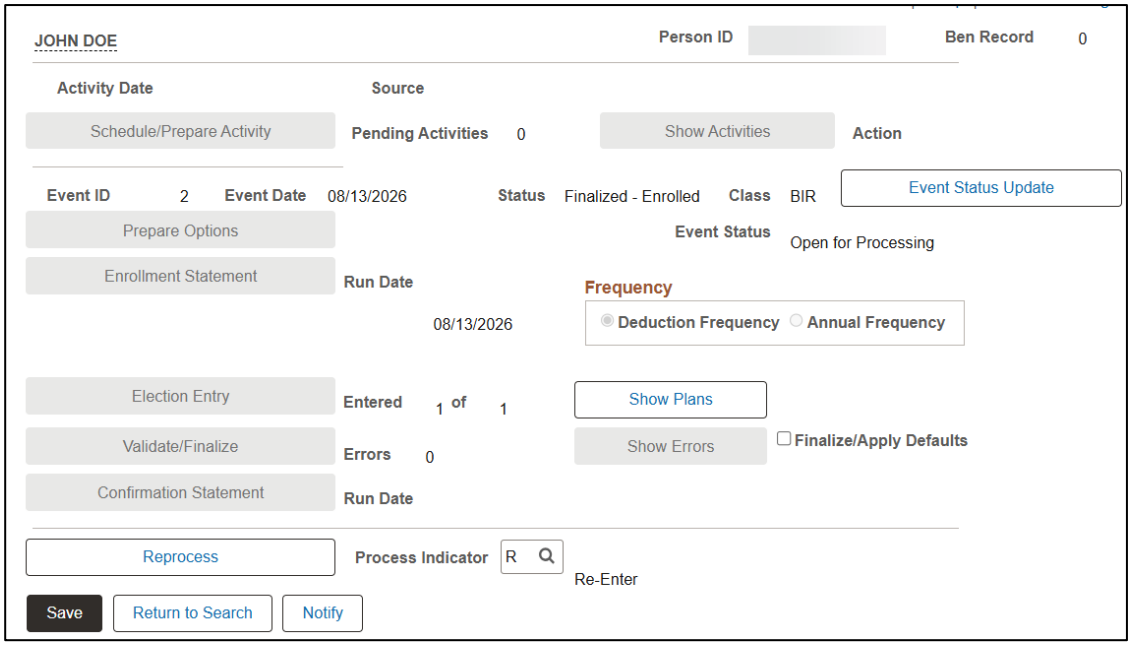
5. Review the events listed and identify the event used to enroll the dependent(s).

Note: Most of the time, this process involves searching for a New Hire, recent life event, or Open Enrollment event. In this example, it is a BIR (Birth or Adoption) Benefit Event. Once the event is identified, it will need to be re-opened to approve the dependent(s).

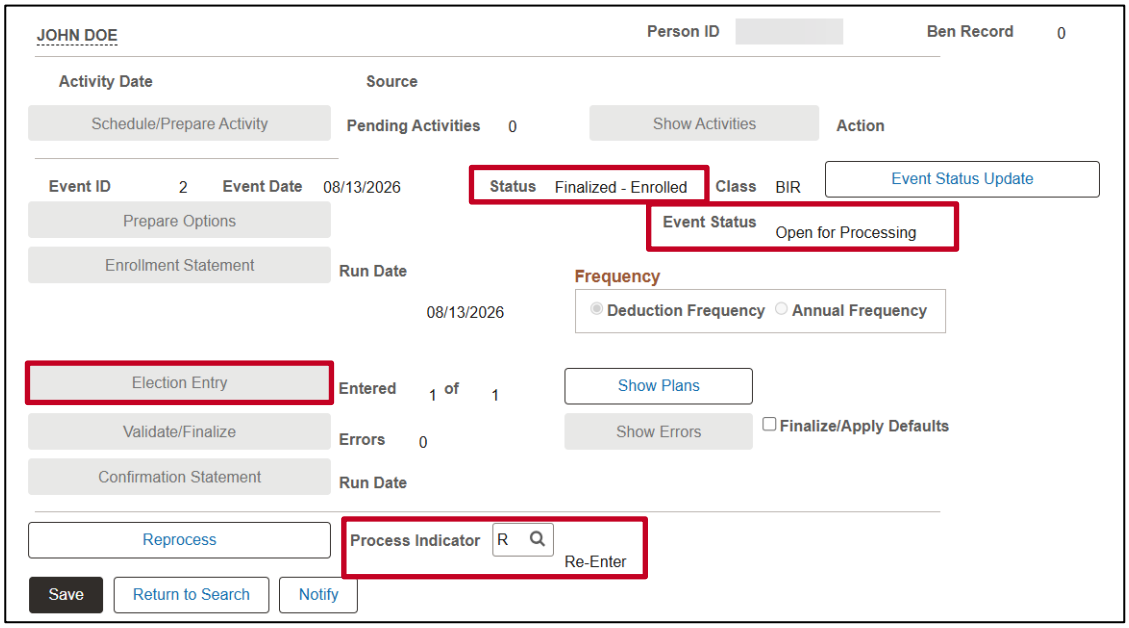


Step	Action
6.	Click the **Process** dropdown button and select “Re-Enter”. 
7.	Click the **Event Status** dropdown button and select “Open for Processing”. 
8.	Click the **OK** button at the bottom of the page.

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



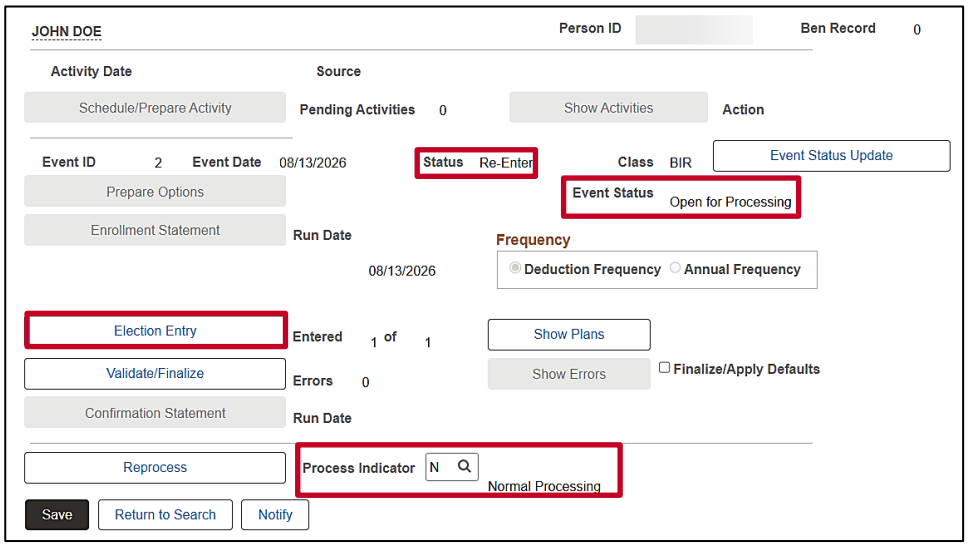
The **Status** field still displays “Finalized – Enrolled”. The **Event Status** field now displays as “Open for Processing”. The **Process Indicator** field displays an “R” for Re-Enter. Notice that the **Election Entry** button is disabled.



Step	Action
9.	Click the **Reprocess** button. Reprocess
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	
10.	Click the **OK** button to close the message. OK
The **On-Demand Event Maintenance** page redisplays.	

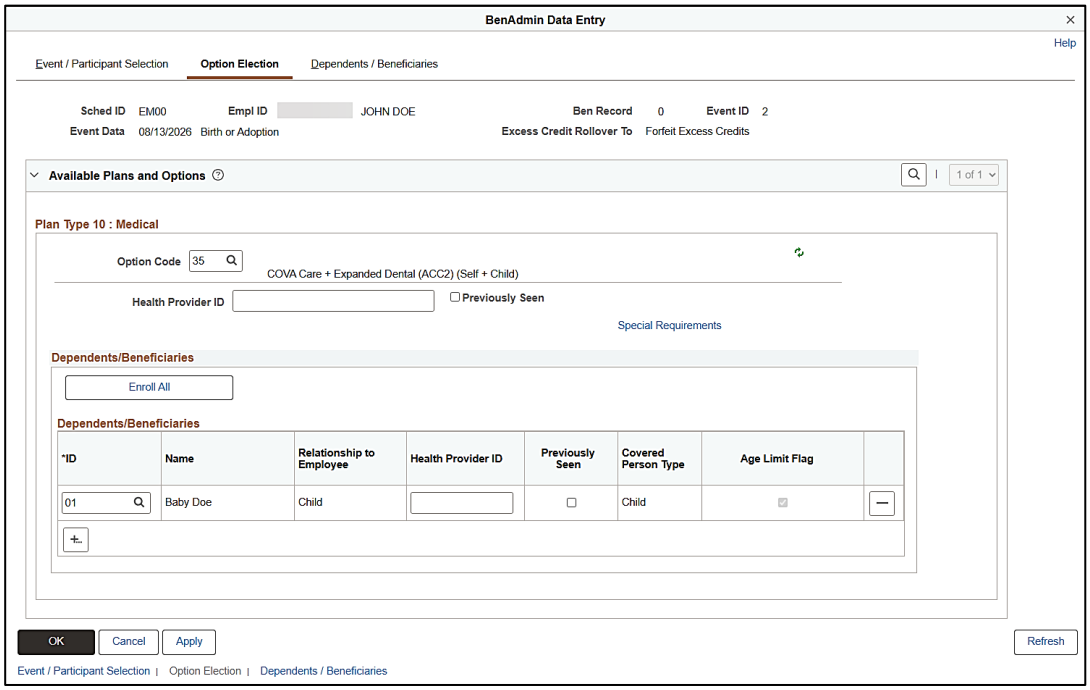
JOHN DOE | Person ID | Ben Record 0
Activity Date | Source
Schedule/Prepare Activity | Pending Activities 0 | Show Activities | Action
Event ID 2 | Event Date 08/13/2026 | Status Re-Enter | Class BIR | Event Status Update
Prepare Options | Event Status Open for Processing
Enrollment Statement | Run Date 08/13/2026 | 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
	The **Status** field now displays “Re-Enter”. The **Event Status** field still displays as “Open for Processing”. The **Process Indicator** field now displays an “N” for Normal Processing. Notice that the **Election Entry** button is enabled.

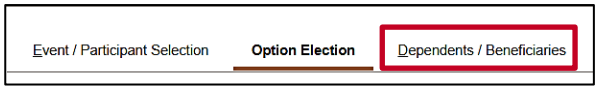


11.	Click the **Election Entry** button.

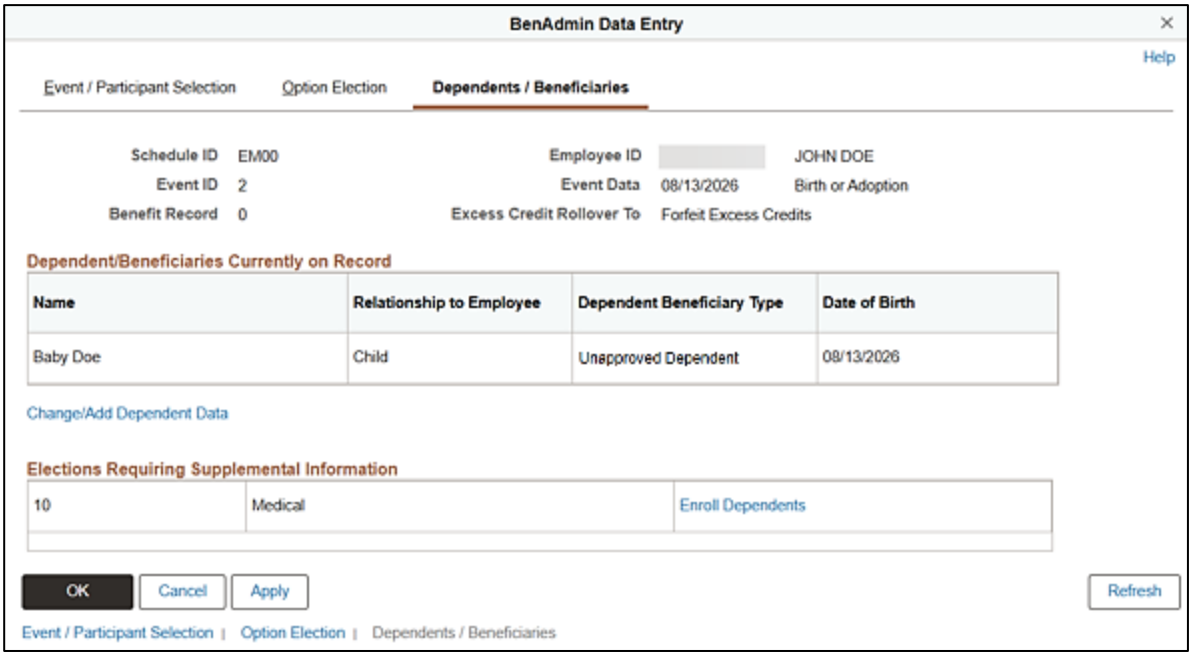
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.



Step	Action
12.	Click the **Dependents / Beneficiaries** tab.

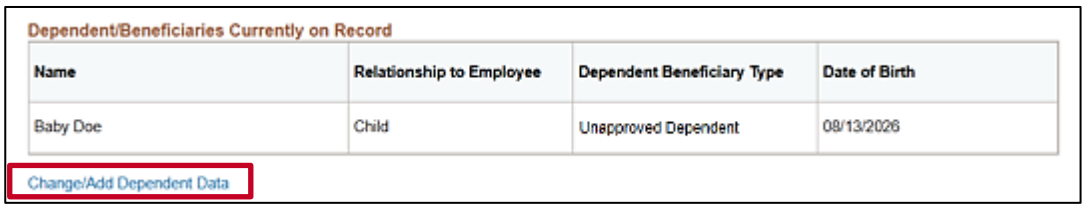


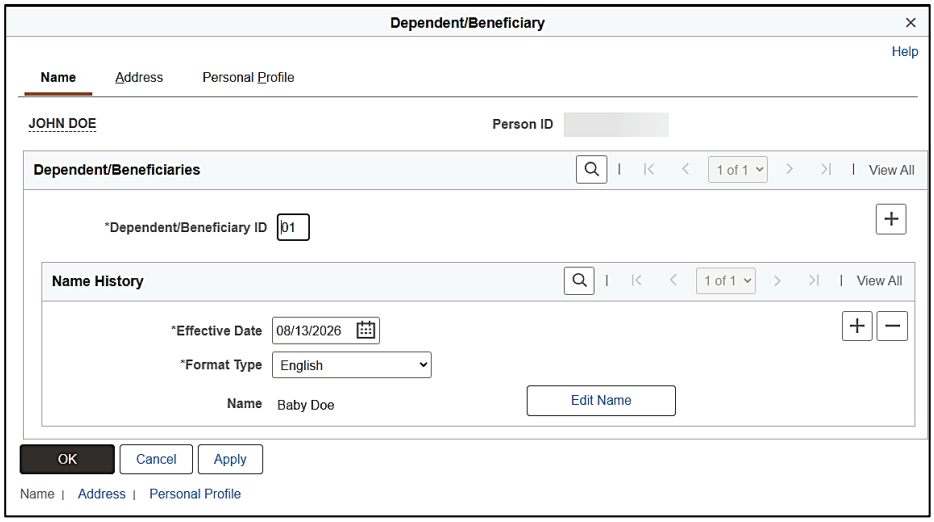
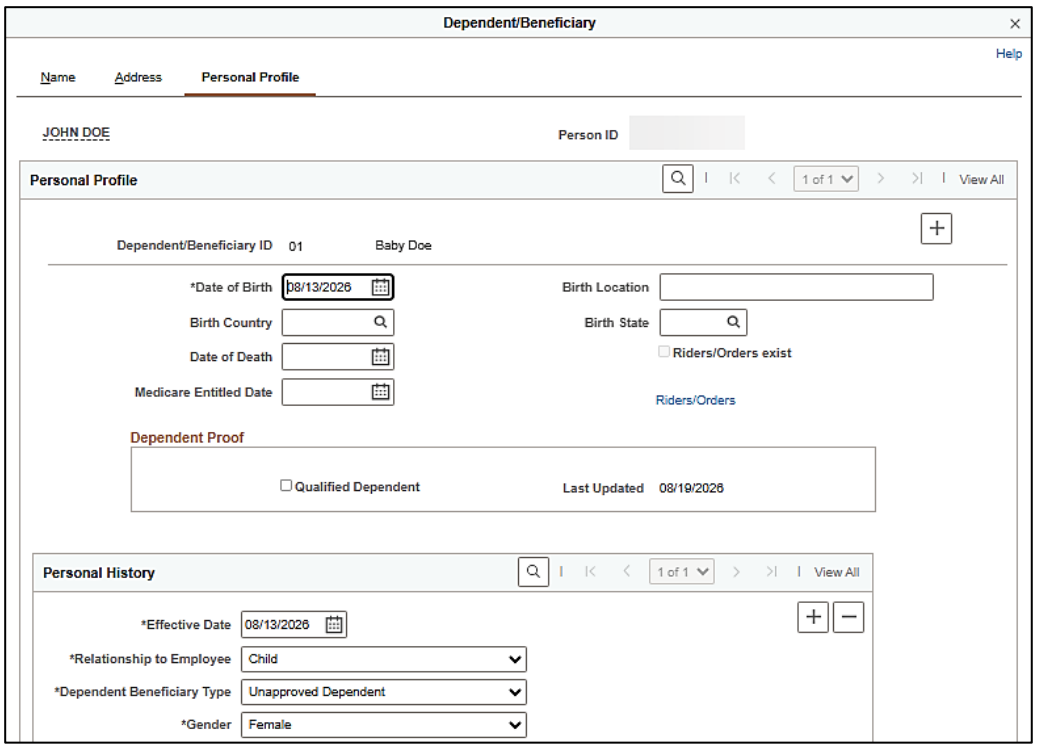
The **Dependents / Beneficiaries** tab displays.

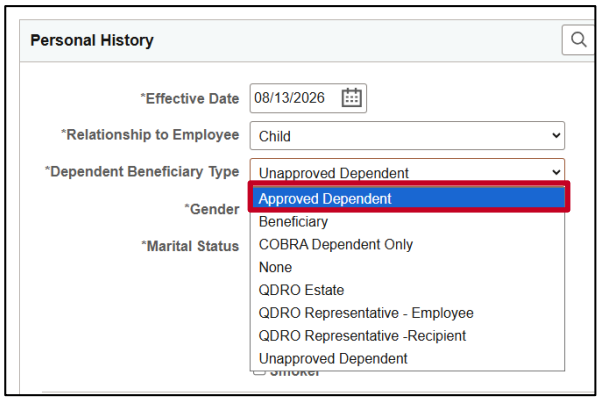


13.	Review the dependent(s) in the **Dependent/Beneficiaries Currently on Record** table. Note that the dependent(s) currently have a status of “Unapproved Dependent”.

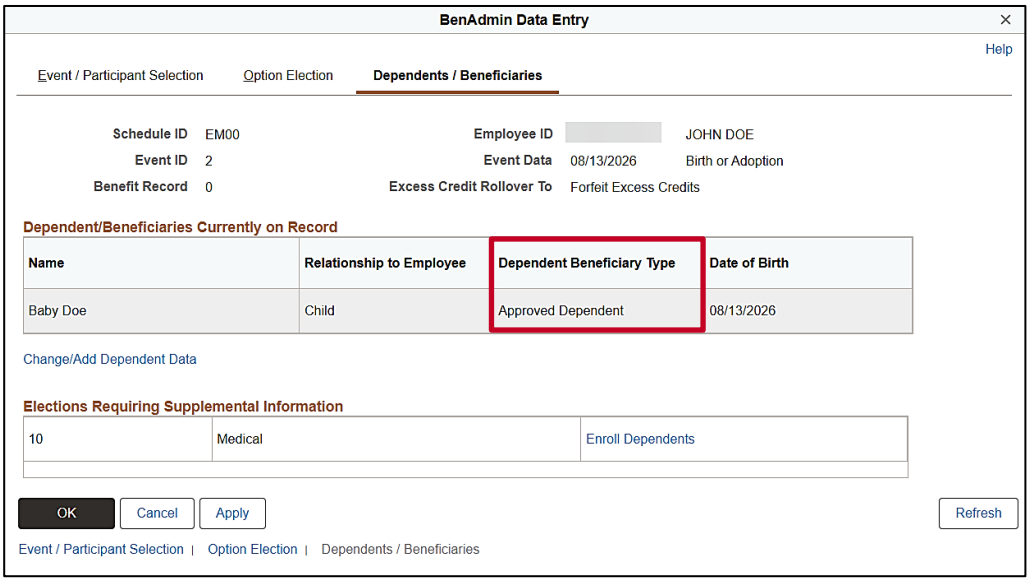
14.	Click the **Change/Add Dependent Data** link.



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

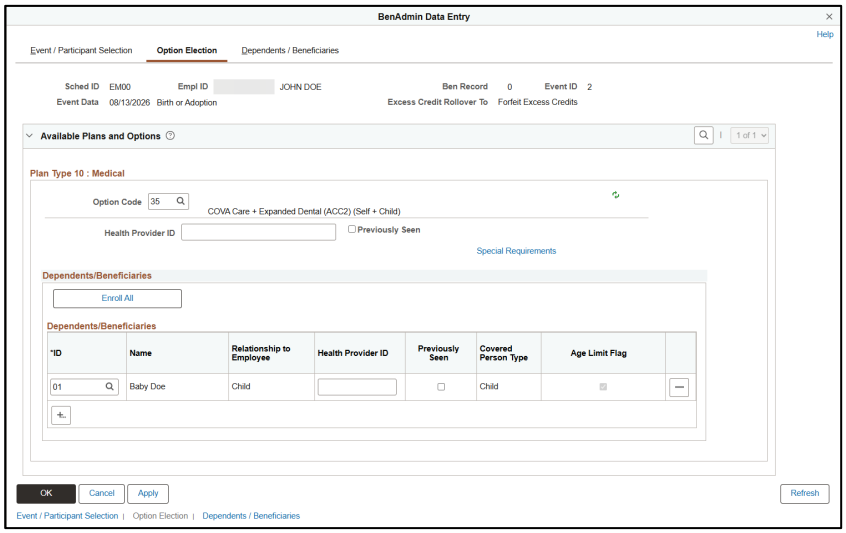
Step	Action
16.	Ensure the applicable dependent is being viewed.
17.	Click the **Dependent Beneficiary Type** dropdown button and select “Approved Dependent”. 
18.	Repeat these steps to update the status to “Approved Dependent” for any additional dependents as needed and then click the **OK** button at the bottom of the page.

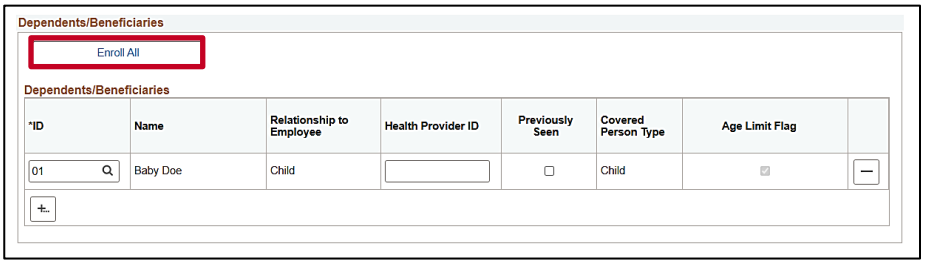
The **Dependents / Beneficiaries** tab redisplays with the updated **Dependent Beneficiary Type**.



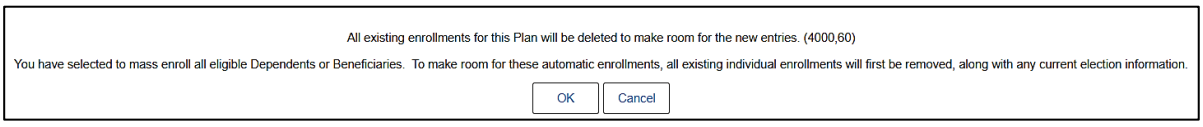
Step	Action
19.	Once all dependents have been changed from “Unapproved Dependent” to “Approved Dependent”, click the **Option Election** tab.

The **Option Election** tab displays.



20.	Review the **Dependents / Beneficiaries** table and ensure that are applicable dependents are listed. Click the **Enroll All** button. 

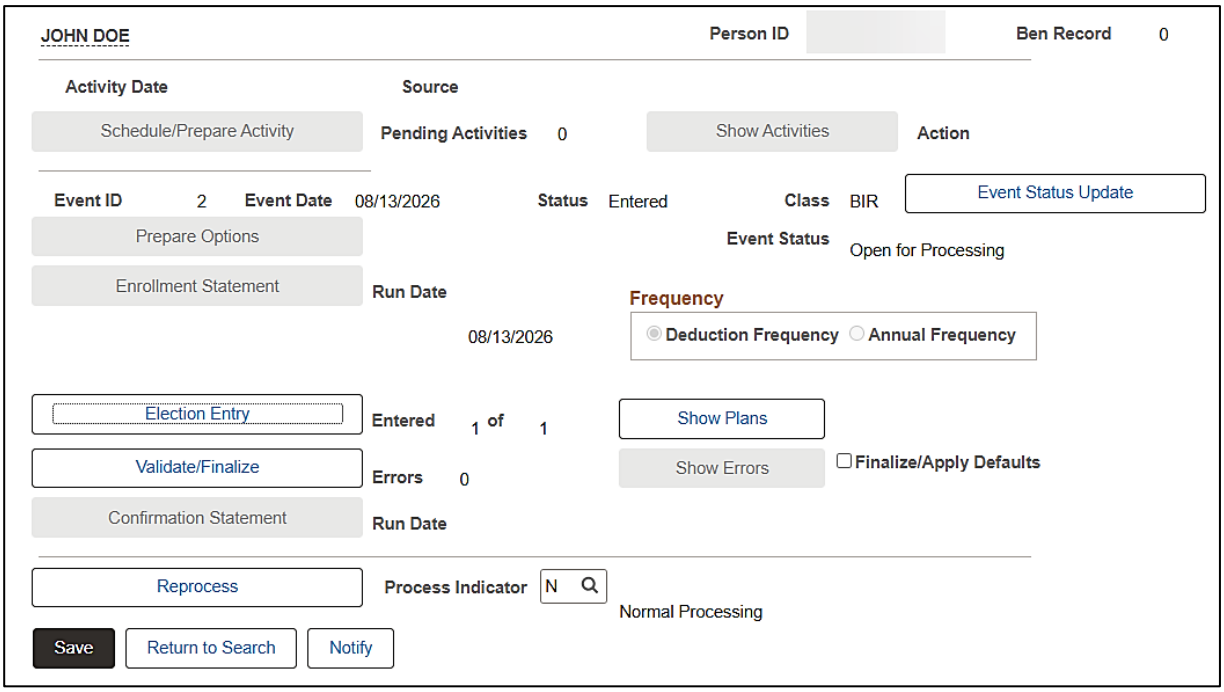
A **Confirmation** message displays in a pop-up window.

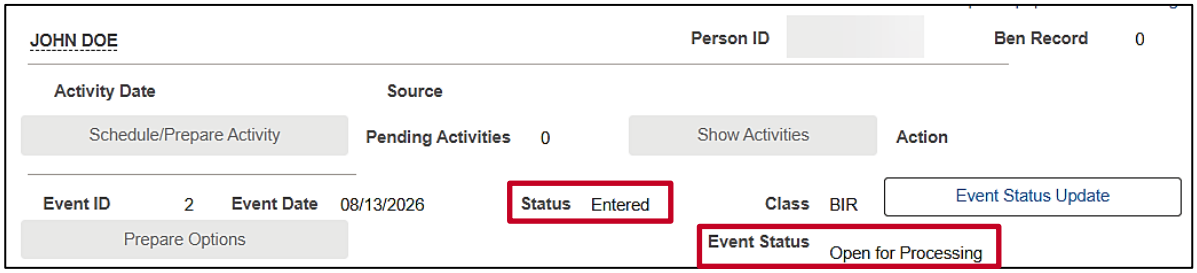
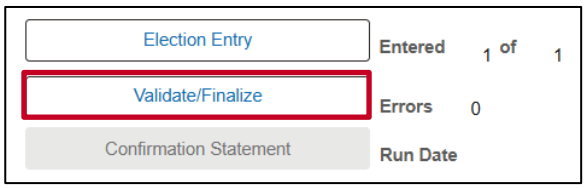


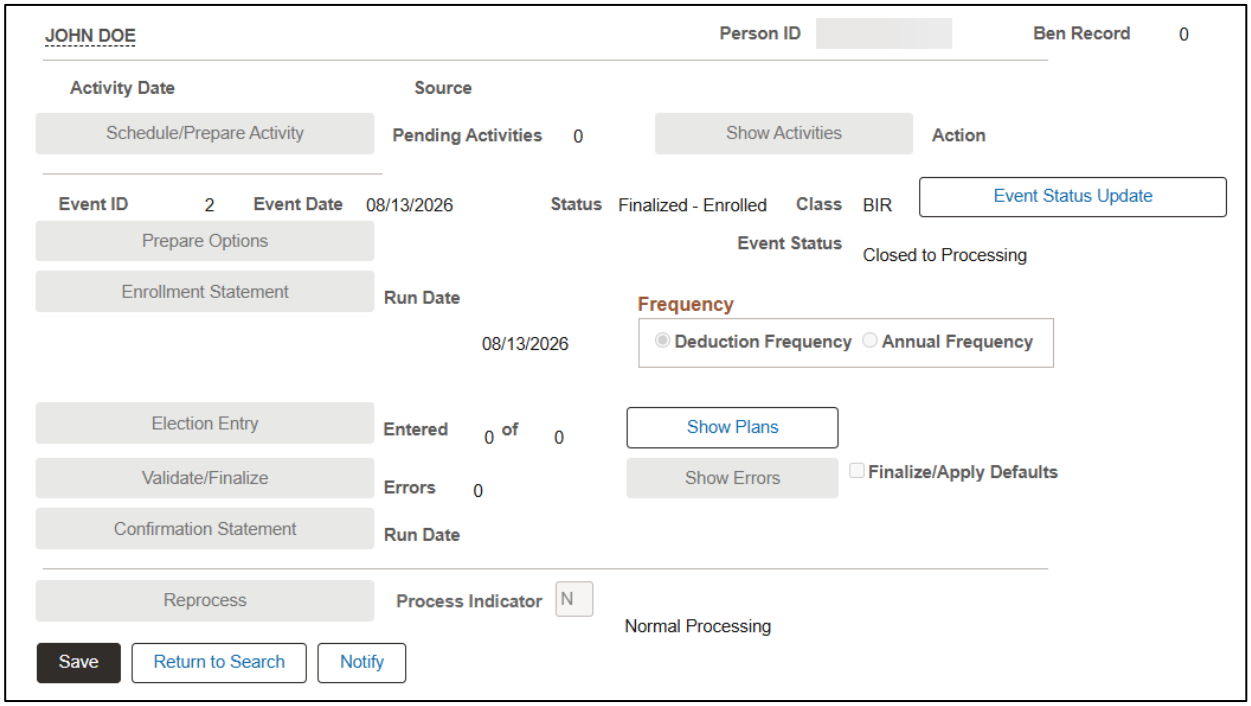
21.	Click the **OK** button.

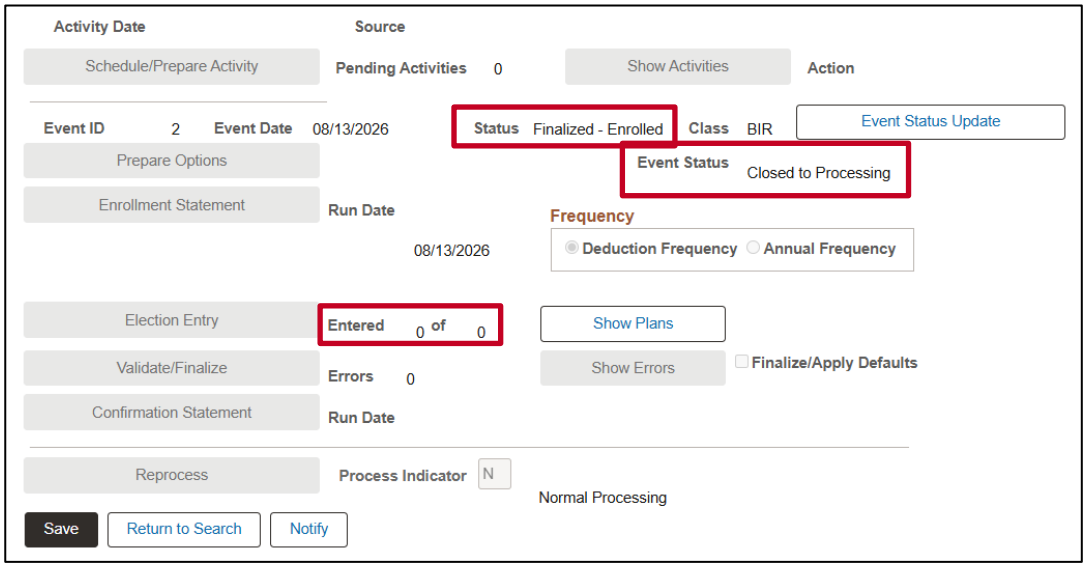
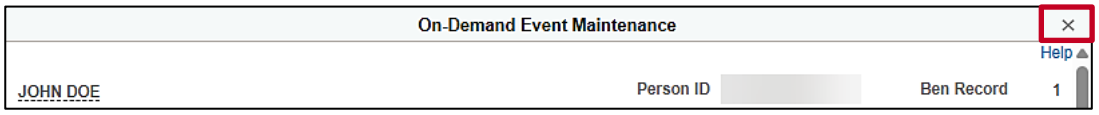
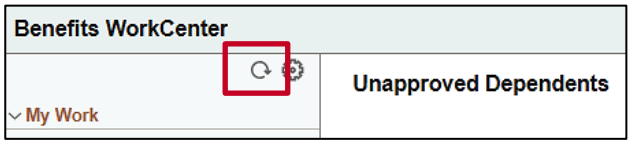
Step	Action
22.	Click the **OK** button at the bottom of the page.

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



23.	Confirm that the **Status** field now displays as “Entered” and the **Event Status** field is still “Open for Processing”. 
24.	Click the **Validate/Finalize** button. 

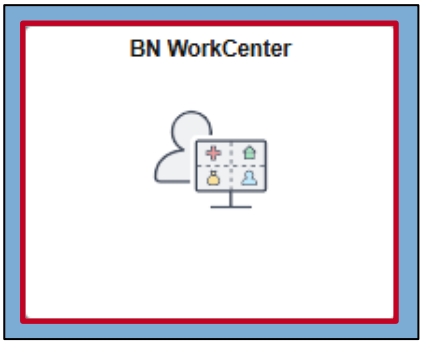
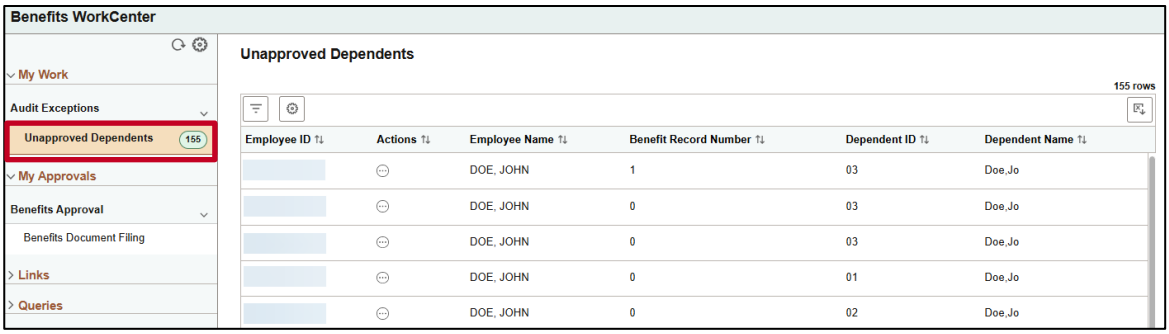
Step	Action
A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.	
25.	Click the **OK** button.
The **On-Demand Event Maintenance** page redisplays. 	

Step	Action
26.	Confirm that the **Status** field now displays as “Finalized-Enrolled” and the **Event Status** field is now “Closed to Processing”. **Note**: The number of elections entered will reset back to “0 of 0”. 
27.	Click the **Close** button (**X**) to close the window. 
28.	Refresh the list by clicking the **Refresh** button at the top of the Benefits WorkCenter. 
	The dependent is removed from the list and the count is reduced. Repeat the process as needed.

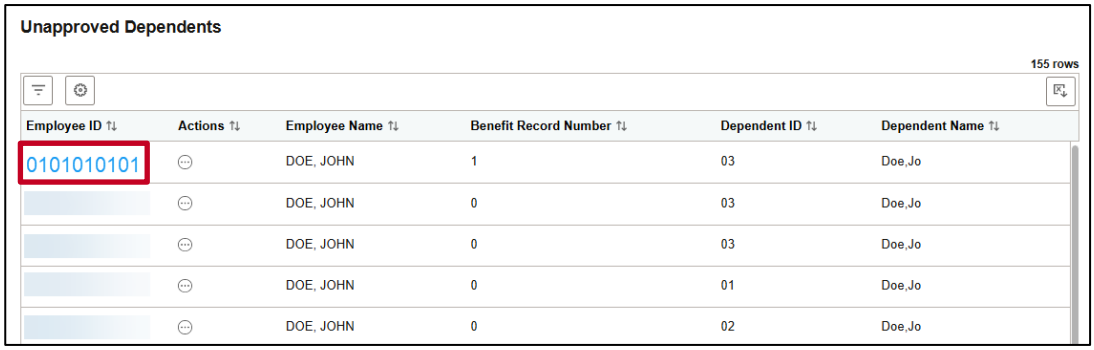
How to Remove an Unapproved Dependent

If no documentation is provided or the documentation does not meet the eligibility requirements for the dependent(s) that were added to their plan coverage, the applicable Benefit Event will need to be re-opened and reprocessed in order to remove the dependent(s) from the Health Plan enrollment election. This Benefit Event could have been triggered by:

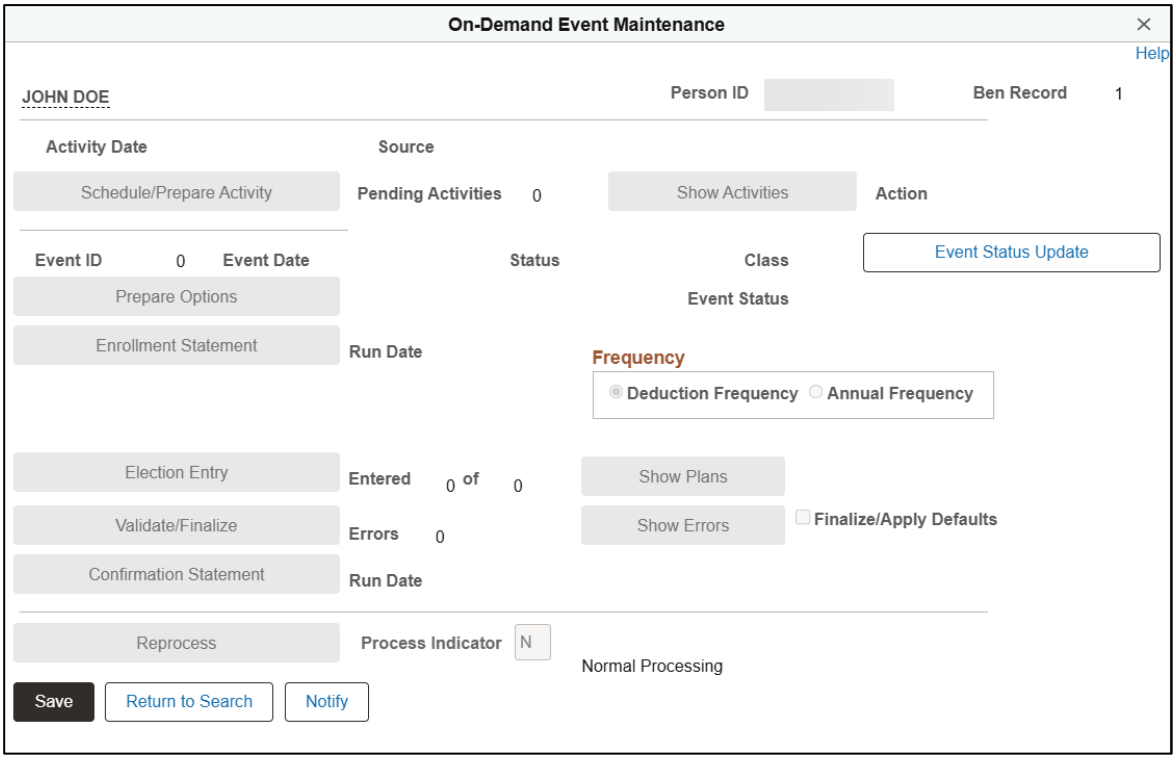
- A Life Event manually created by a Benefits Administrator
- A Job Record (e.g., hire, re-hire, etc.)
- An Open Enrollment Event including the addition of dependents to coverage with supporting documentation provided as a hard copy.

Step	Action
1.	Navigate to the **Unapproved Dependents** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **My Work > Audit Exceptions > Unapproved Dependents** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

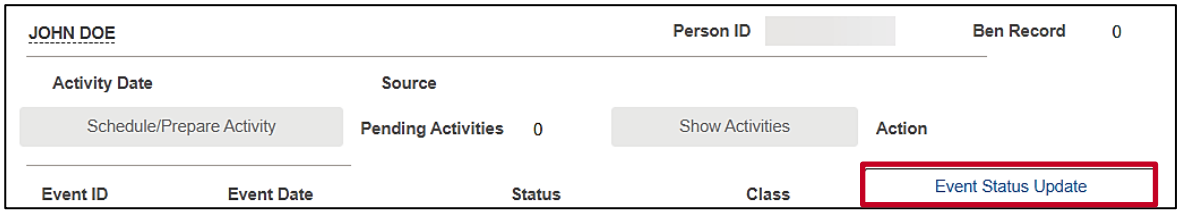
Step	Action
3.	Click the **Employee ID** link of the unapproved dependent.



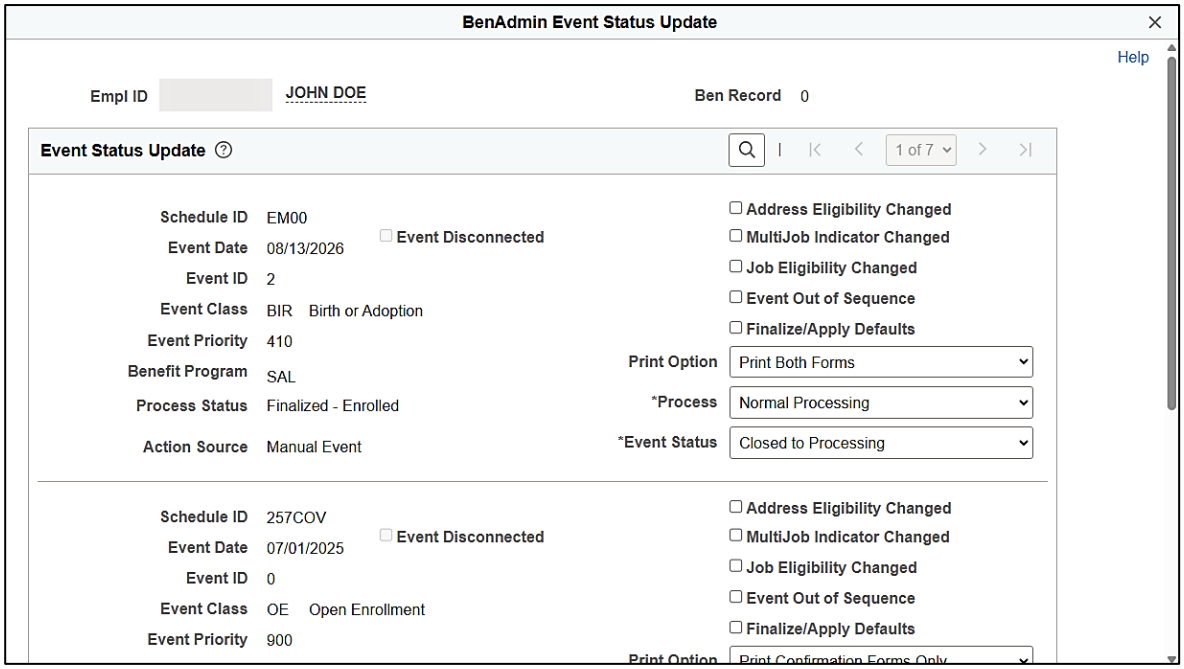
The **On-Demand Event Maintenance** page displays in a pop-up window.



4.	Click the **Event Status Update** button.

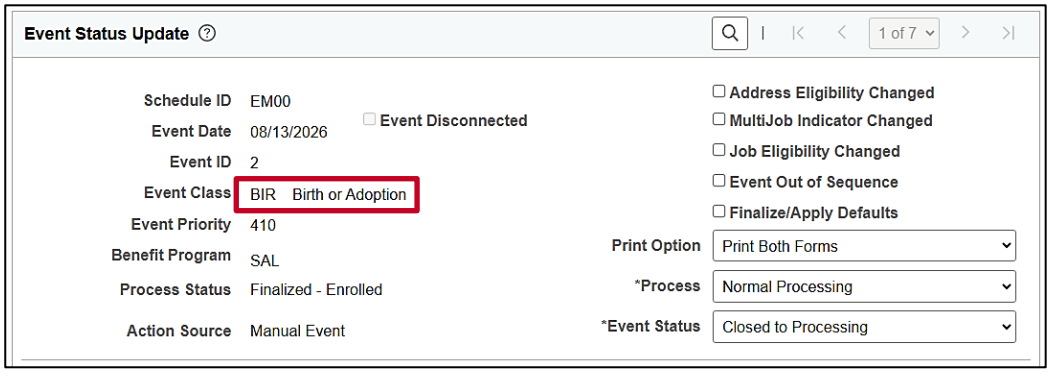


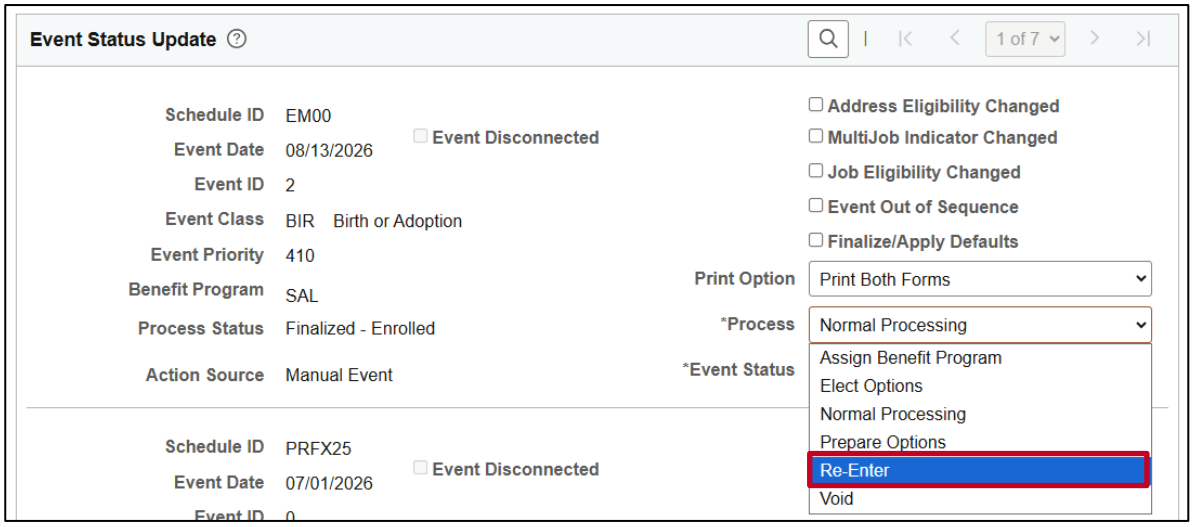
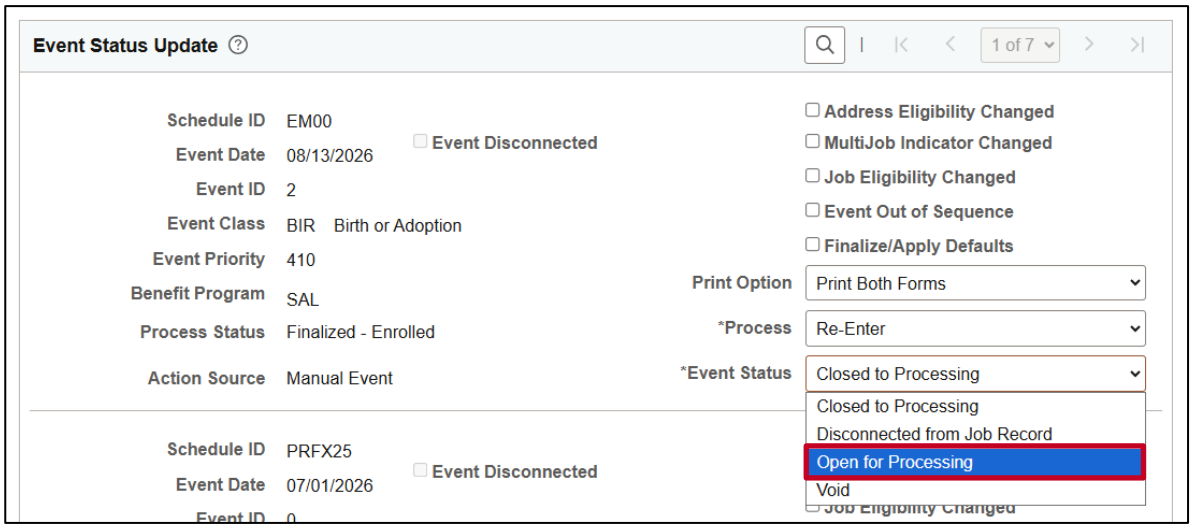
Step	Action
	The **BenAdmin Event Status Update** page displays in a pop-up window.



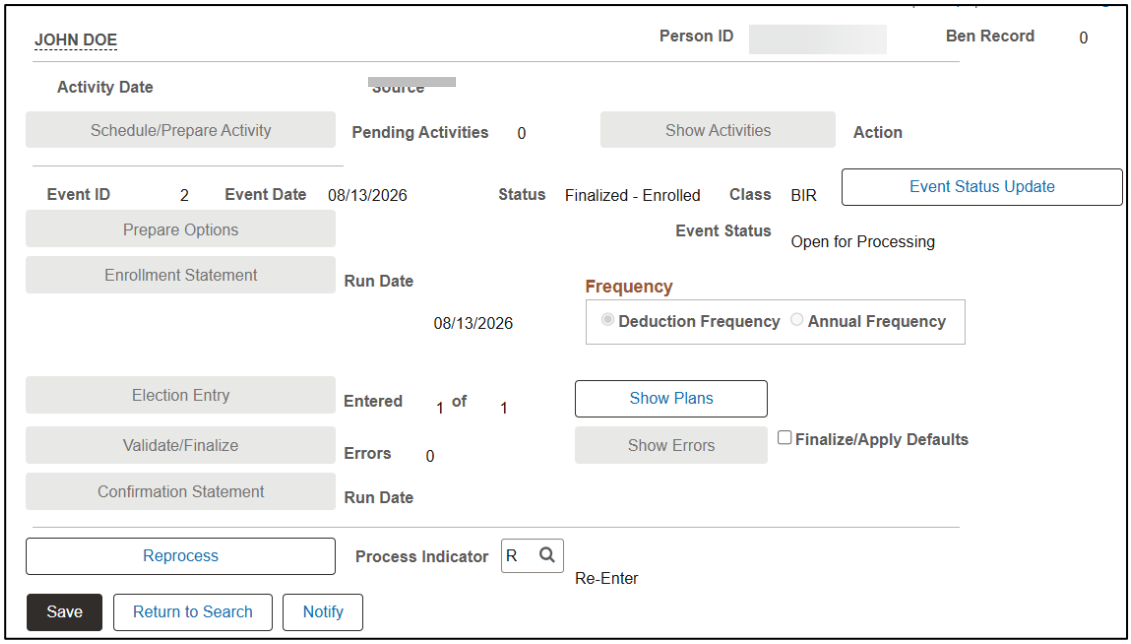
5. Review the events listed and identify the event used to enroll the dependent(s).

Note: Most of the time, this process involves searching for a New Hire, recent life event, or Open Enrollment event. In this example, it is a BIR (Birth) Benefit Event. Once the event is identified, it will need to be re-opened to remove the dependent(s).

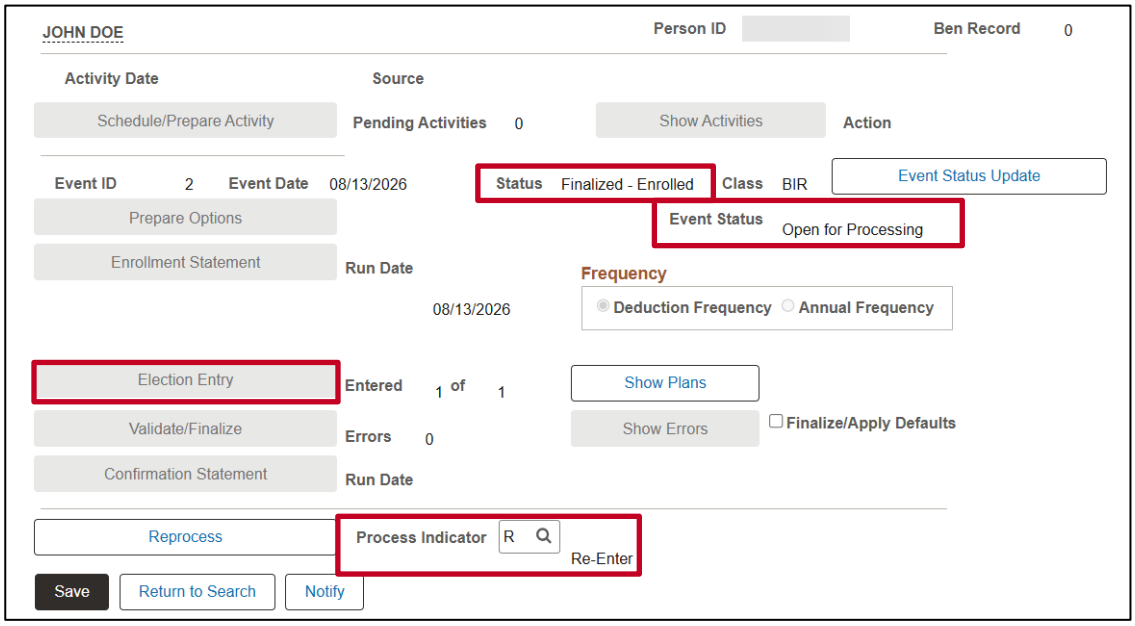


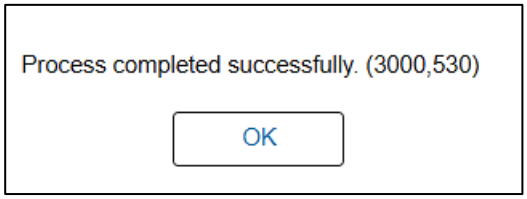
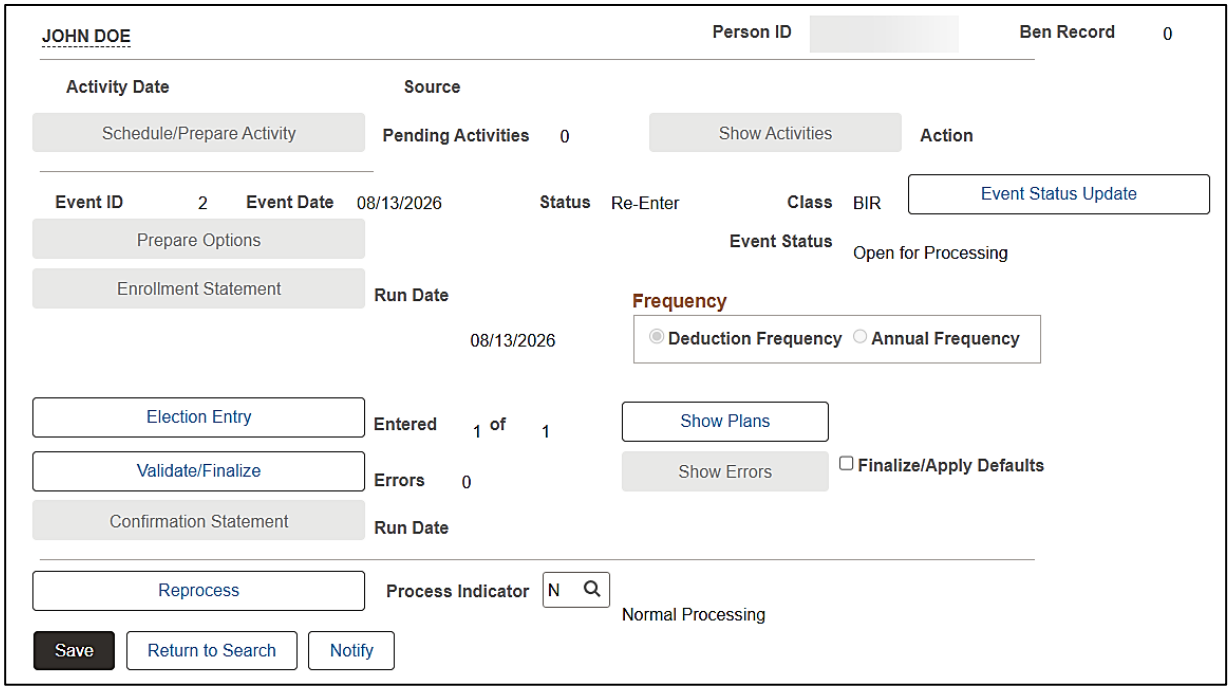
Step	Action
6.	Click the **Process** dropdown button and select “Re-Enter”. 
7.	Click the **Event Status** dropdown button and select “Open for Processing”. 
8.	Click the **OK** button at the bottom of the page.

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

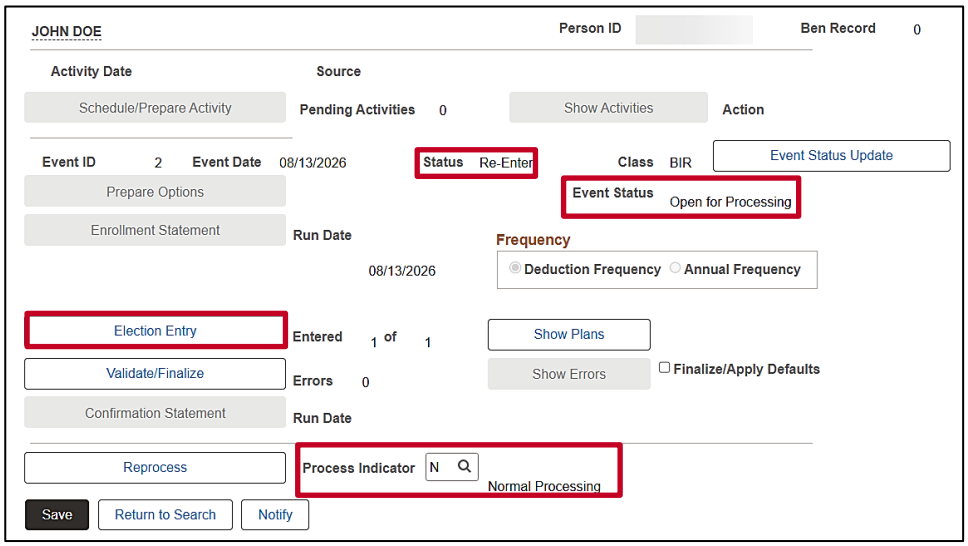


The **Status** field still displays “Finalized – Enrolled”. The **Event Status** field now displays as “Open for Processing”. The **Process Indicator** field displays an “R” for Re-Enter. Notice that the **Election Entry** button is disabled.



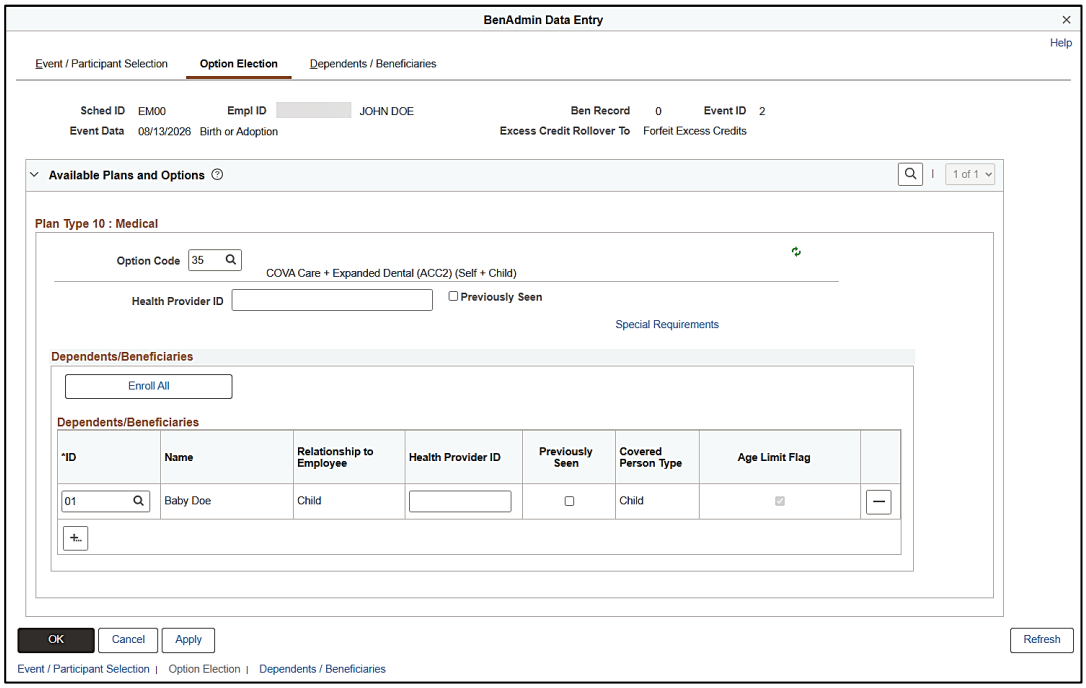
Step	Action
9.	Click the **Reprocess** button.
A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.  	
10.	Click the **OK** button to close the message.
The **On-Demand Event Maintenance** page redisplays.  	

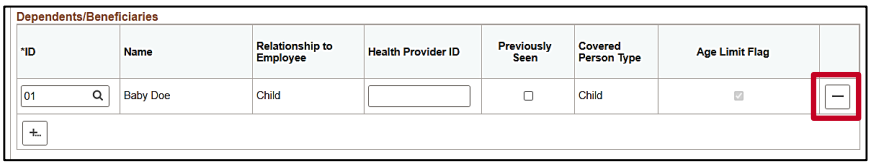
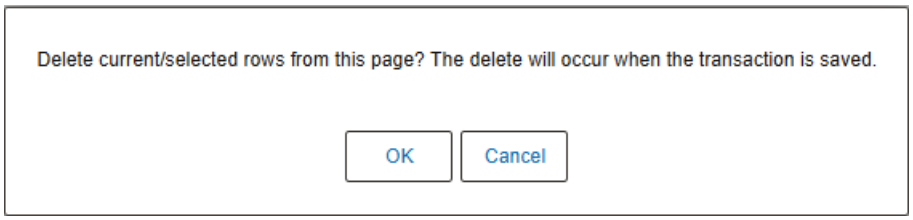
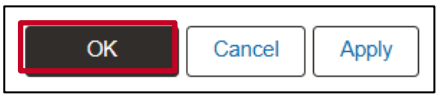
Step	Action
	The **Status** field now displays “Re-Enter”. The **Event Status** field still displays as “Open for Processing”. The **Process Indicator** field now displays an “N” for Normal Processing. Notice that the **Election Entry** button is enabled.



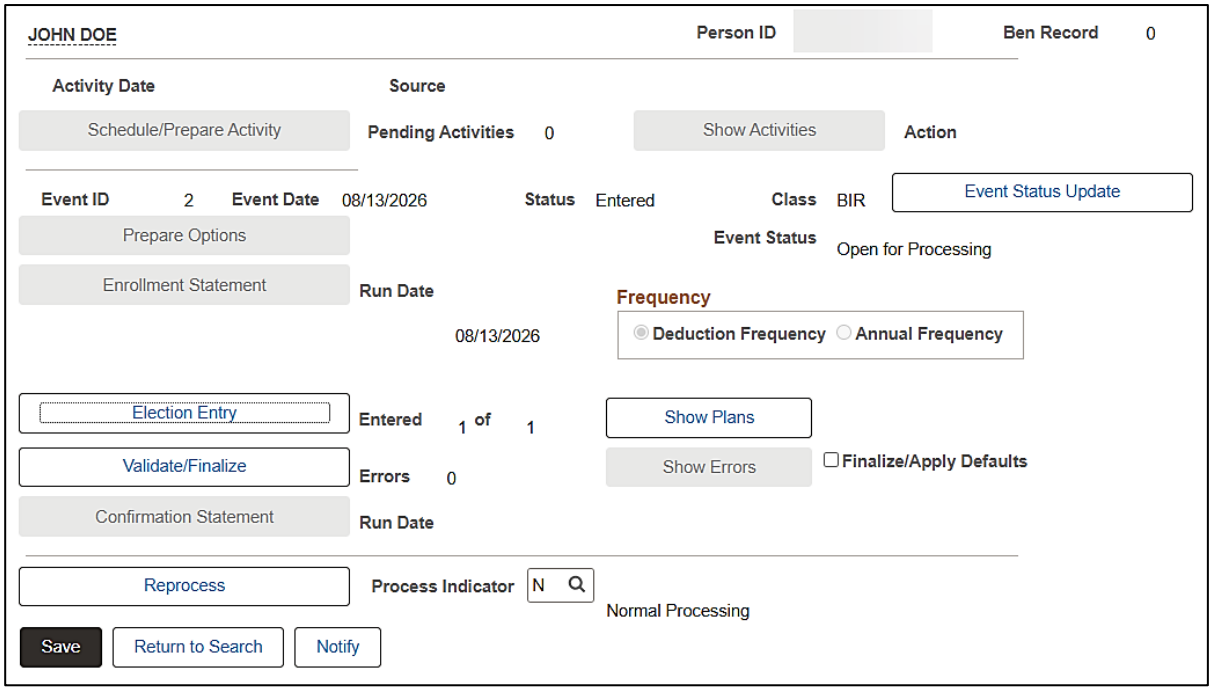
11.	Click the **Election Entry** button.

The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default.

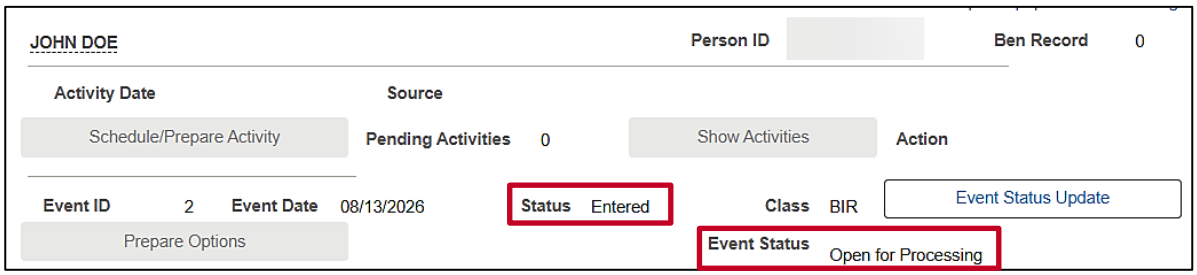


Step	Action
12.	Check the **Option Code** to see if the Coverage Level needs to be changed after removing the dependent(s) (e.g., “Family” to “Self & Spouse”, “Self & Spouse” to “Single”).
13.	In the **Dependents/Beneficiaries** section, click the **Delete** button (**-**) to remove the dependent that was not approved. 
A **Confirmation** message displays to ensure you want to delete this dependent.  	
14.	Click the **OK** button to close the message.
15.	Click the **OK** button at the bottom of the page. 

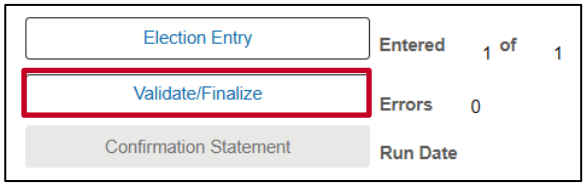
Step	Action
	The **On-Demand Event Maintenance** page redisplays.

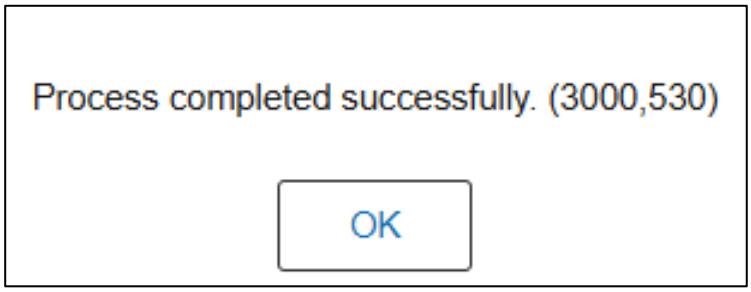
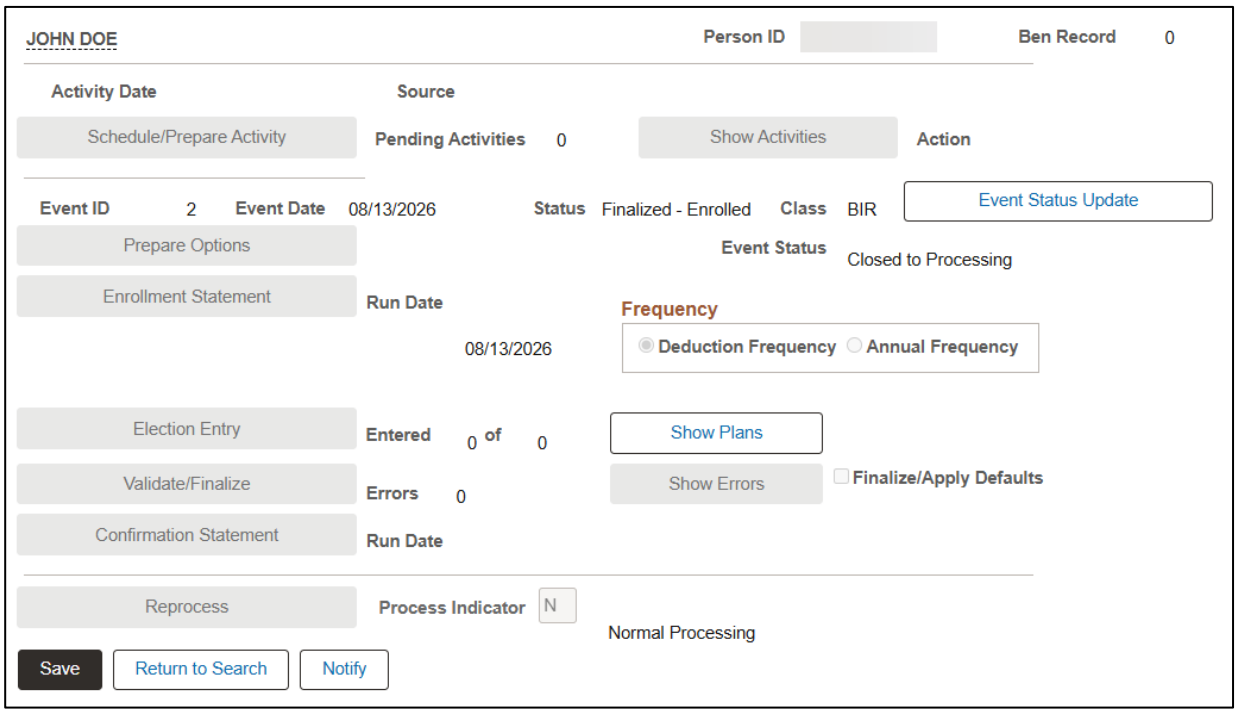


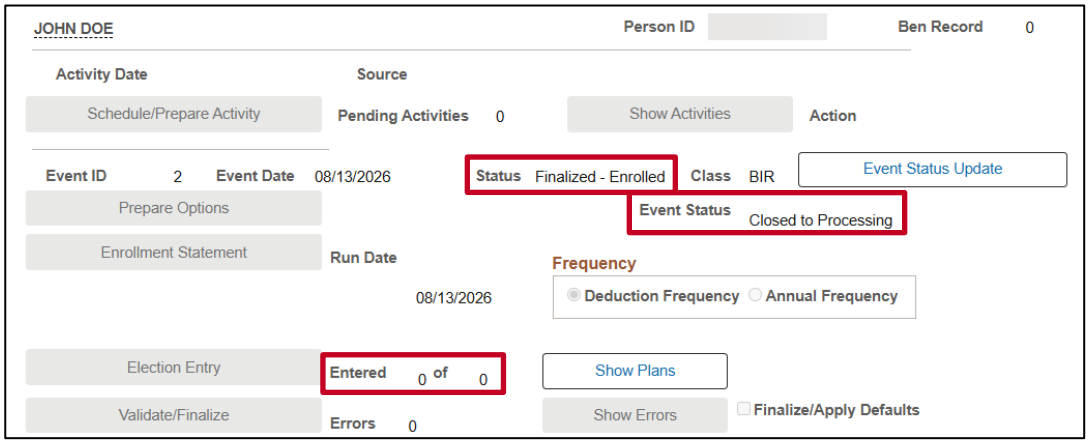
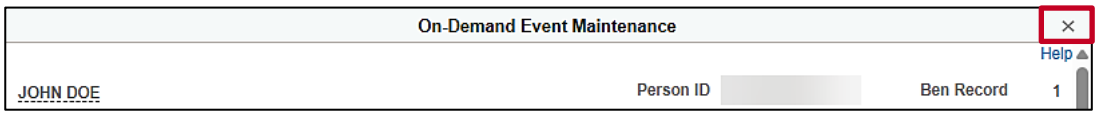
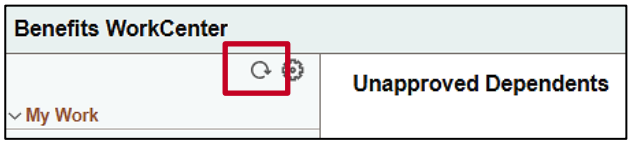
16.	Confirm that the **Status** field now displays as “Entered” and the **Event Status** field is still “Open for Processing”.



17.	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. 	
18.	Click the **OK** button.
The **On-Demand Event Maintenance** page redisplays. 	

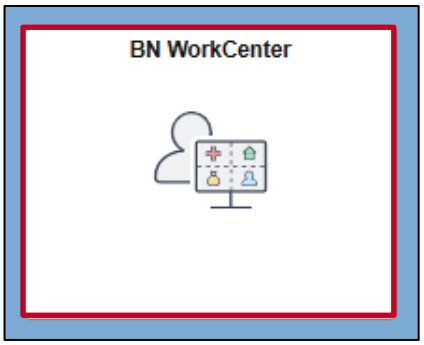
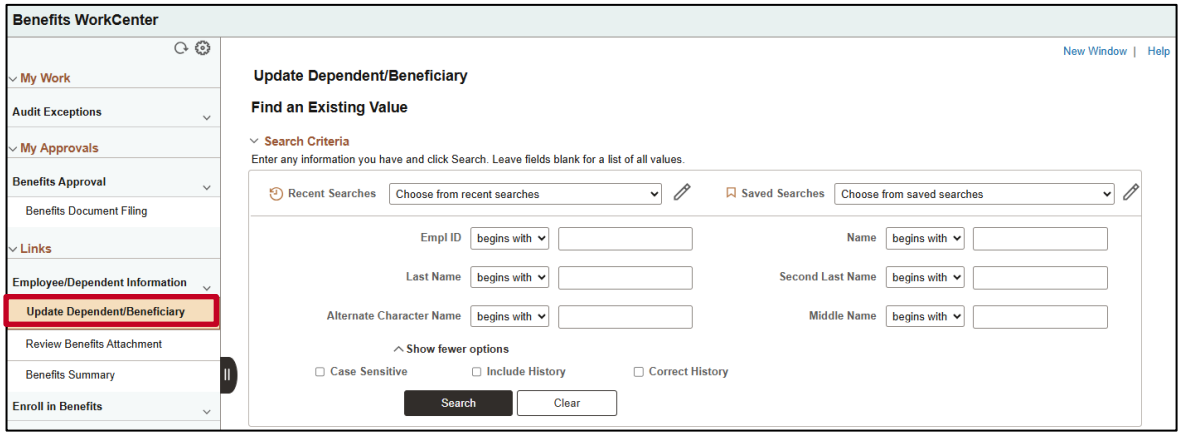
Step	Action
19.	Confirm that the **Status** field now displays as “Finalized-Enrolled” and the **Event Status** field is now “Closed to Processing”. **Note**: The number of elections entered will reset back to “0 of 0”. 
20.	Click the **Close** button (**X**) to close the window. 
21.	Refresh the list by clicking the **Refresh** button at the top of the Benefits WorkCenter. 
	The dependent is removed from the list and the count is reduced. Repeat the process as needed.

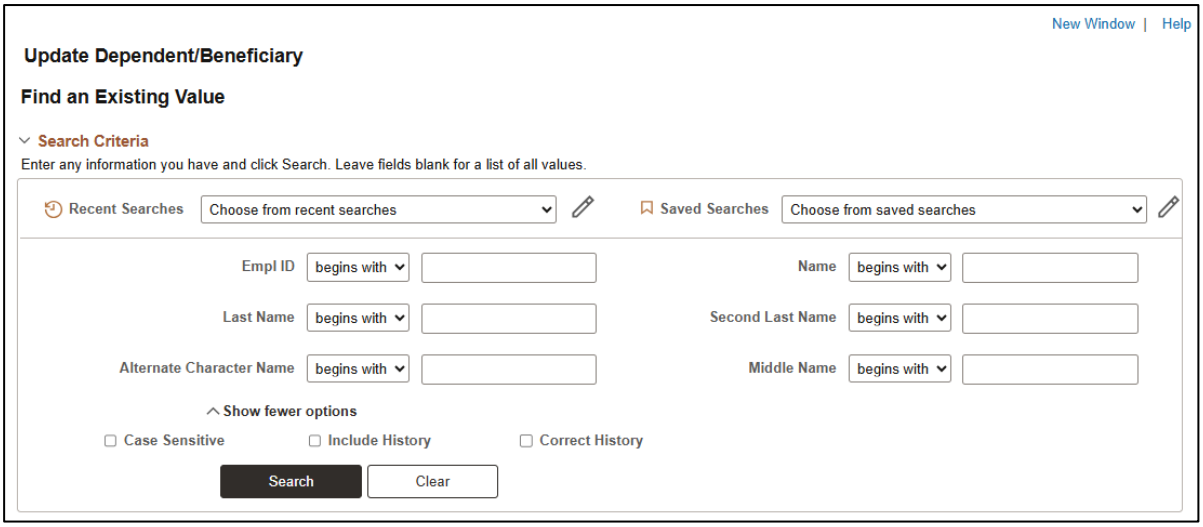
Managing Dependent Personal Information

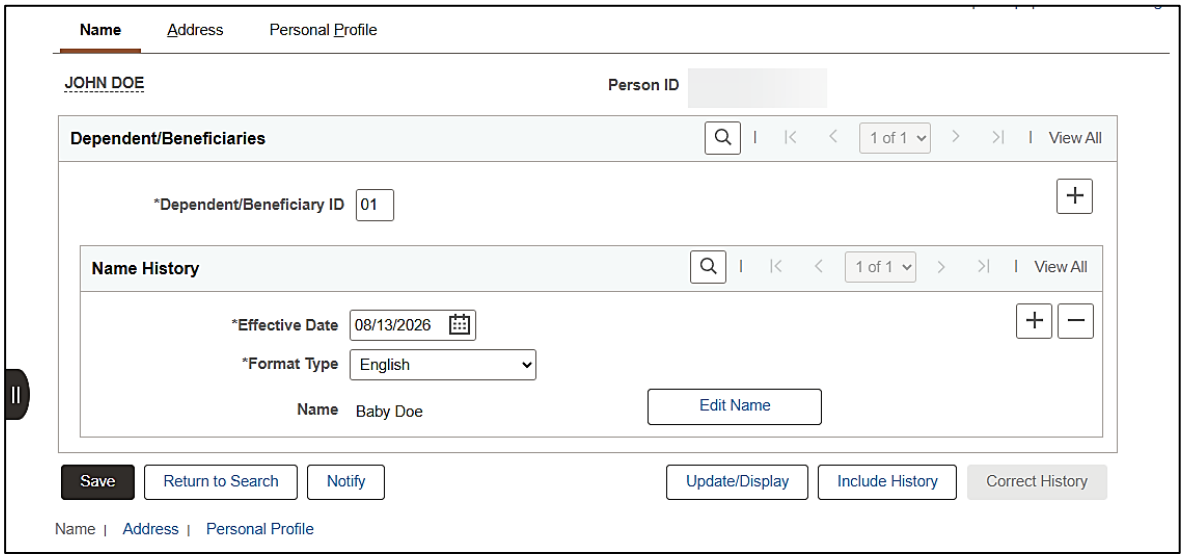
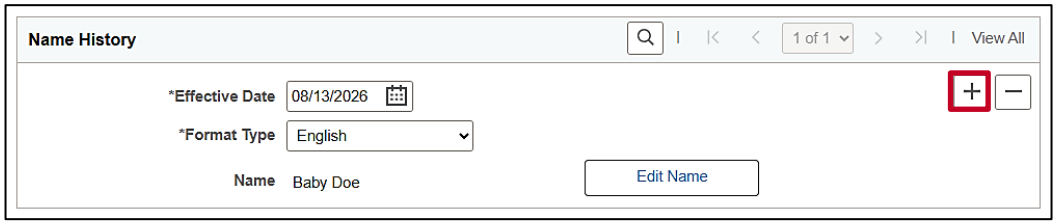
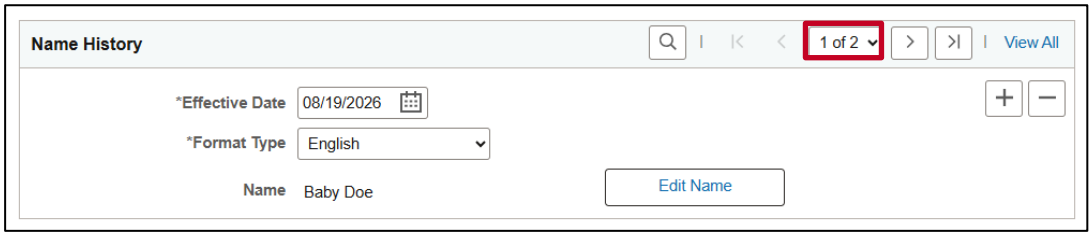
If a Benefit Event has been finalized and the dependent is enrolled, changes can be made by re-opening the Benefit Event and making the necessary changes. For more information on re-opening and reprocessing a Benefit Event, refer to the Job Aid titled **BN361 Re-opening and Reprocessing a Benefit Event**.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

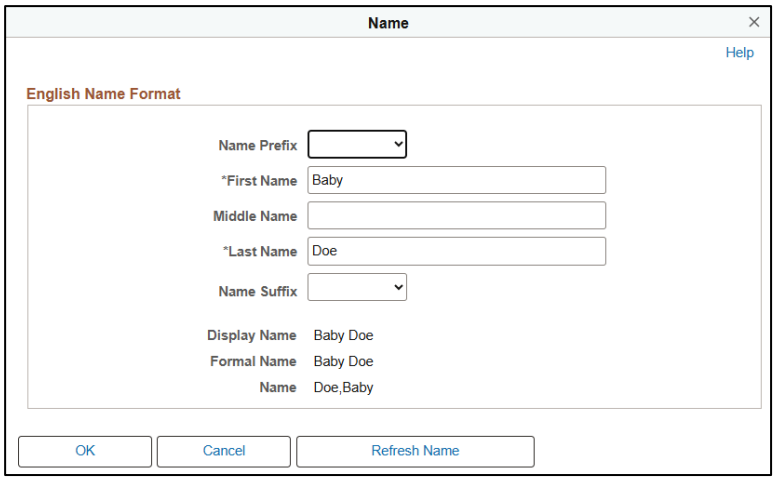
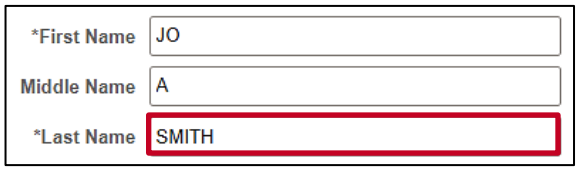
If no Benefit Event is available, changes must be made on the **Update Dependent/Beneficiary** page. All updates will be sent to the Vendors on the Monthly Reconciliation File which is sent on the first Monday of each month.

In this scenario, there is no Benefit Event available to make the changes.

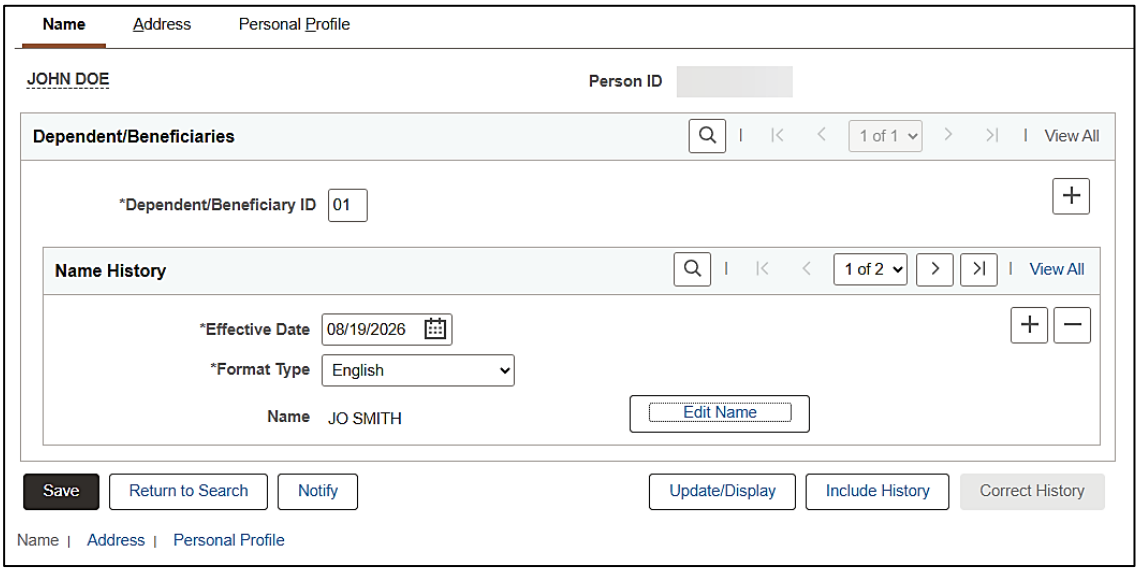
Step	Action
1.	Navigate to the **Update Dependent/Beneficiary** page by clicking the **BN WorkCenter** tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled **Overview of the Cardinal HCM WorkCenters** located on the Cardinal website in **Job Aids** under **Learning**.
2.	Use the following navigation path in the WorkCenter: **Links > Employee/Dependent Information > Update Dependent/Beneficiary** **Note**: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

Step	Action
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** located on the Cardinal website in **Job Aids** under **Learning**.
3.	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.
4.	Select the **Correct History** checkbox option.
5.	Click the **Search** button.

Step	Action
	The **Update Dependent/Beneficiary** page displays for the selected employee with the **Name** tab displayed by default. 
	As an example, the steps below outline the process for a name change.
6.	Click the **Add a new row** (**+**) icon in the **Name History** section to add a new effective dated row. 
	The **Name History** section redisplays with the new effective dated row. 
7.	The Effective Date defaults to today's date. Update the **Effective Date** field as needed.

Step	Action
8.	Click **Edit Name** button.
The **Name** page displays in a pop-up window.  	
9.	Update the Name fields as needed. For this example, “Smith” has been entered in the **Last Name** field as an update. 
10.	Click the **OK** button.

Step	Action
	The **Update Dependent/Beneficiary** page redisplays with the **Display Name** field updated in the **Name History** section.



11.	Click the **Save** button.