

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.



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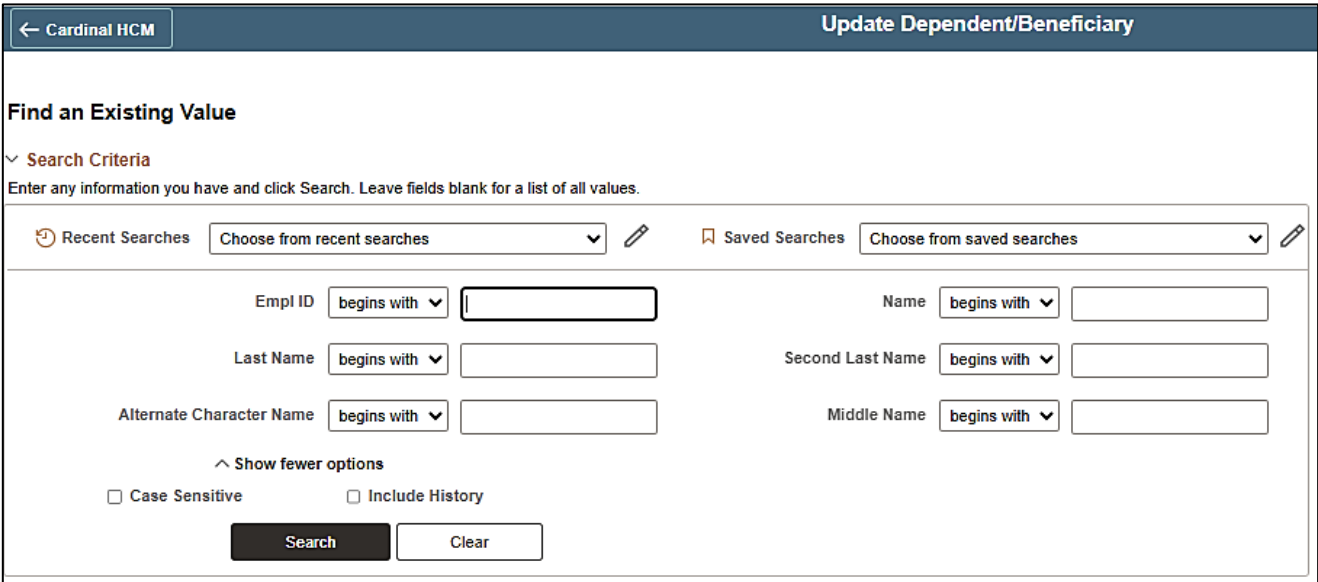
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Revision History

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. 



Benefits Job Aid

BN361 Managing and Approving Dependents

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

← Cardinal HCM

Update Dependent/Beneficiary

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 ▼

Name

begins with ▼

Last Name

begins with ▼

Second Last Name

begins with ▼

Alternate Character Name

begins with ▼

Middle Name

begins with ▼

^ Show fewer options

☐ Case Sensitive

☐ Include History

Search

Clear

🔖 Save Search

▼ Search Results

2 results - Empl ID "00862103400"

1-2 of 2

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>

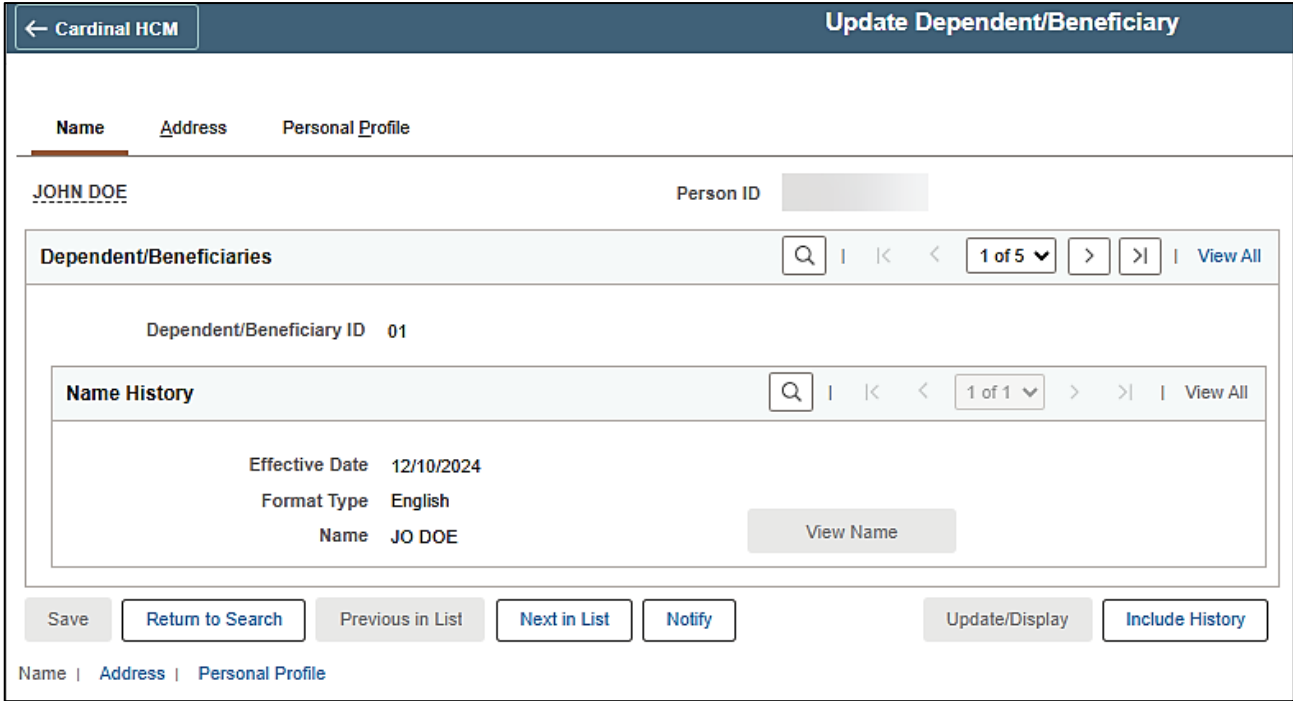
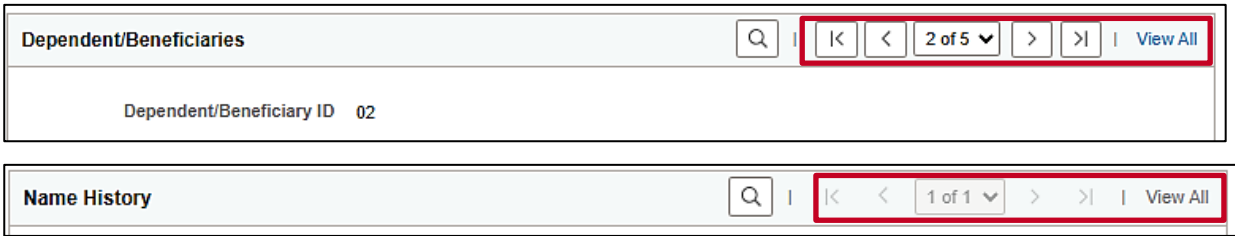
|

View All

Empl ID	Name	First Name	Last Name	Middle Name	Business Unit	Company	HR Status	Payroll Status	
	JOHN DOE	JOHN	DOE	(blank)	99900	ABC	Active	Active	>
	JOHN DOE	JOHN	DOE	(blank)	99900	ABC	Inactive	Terminated	>

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

1-2 of 2									
Empl ID	Name	First Name	Last Name	Middle Name	Business Unit	Company	HR Status	Payroll Status	
	JOHN DOE	JOHN	DOE	(blank)	99900	ABC	Active	Active	>
	JOHN DOE	JOHN	DOE	(blank)	99900	ABC	Inactive	Terminated	>

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.

Name
Address
Personal Profile

Dependent/Beneficiaries

JOHN DOE

Person ID

Dependent/Beneficiary ID 01
Name JO DOE

Address History

Effective Date 12/10/2024

☒ Same Address as Employee

Address Type Home

Employee's Current Address

Country USA United States

Address 100 MAIN ST RICHMOND, VA 99999

Phone Information

1-1 of 1

Same As Employee	Phone Type	Telephone	Extension	Preferred
☐	Mobile			☒

Email

1-1 of 1

Email Type	Email Address

Save
Return to Search
Previous in List
Next in List
Notify

Update/Display
Include History

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.

Dependent/Beneficiaries

2 of 5

[View All](#)

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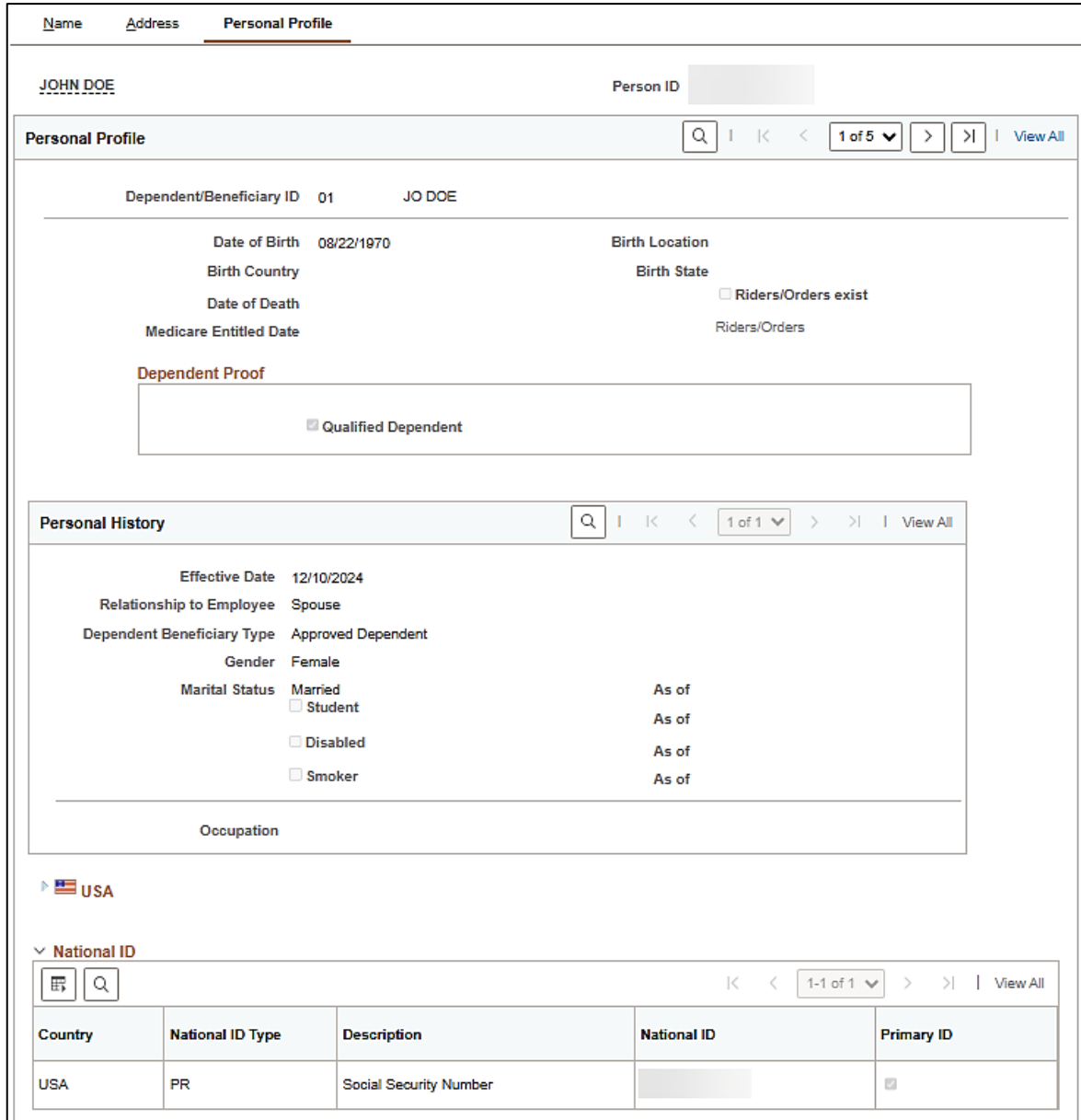


Benefits Job Aid

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Step	Action
6.	Click the Personal Profile tab. 

The **Personal Profile** page displays.



Name Address **Personal Profile**

JOHN DOE Person ID [REDACTED]

Personal Profile [Search] [1 of 5] [View All]

Dependent/Beneficiary ID 01 JO DOE

Date of Birth 08/22/1970 Birth Location Birth State
Birth Country
Date of Death
Medicare Entitled Date
☐ Riders/Orders exist
Riders/Orders

Dependent Proof

☒ Qualified Dependent

Personal History [Search] [1 of 1] [View All]

Effective Date 12/10/2024
Relationship to Employee Spouse
Dependent Beneficiary Type Approved Dependent
Gender Female
Marital Status Married As of
☐ Student As of
☐ Disabled As of
☐ Smoker As of

Occupation

USA

▼ **National ID**

[Search] [1-1 of 1] [View All]

Country	National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	[REDACTED]	☒

Step

Action

i

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.

Personal Profile

Q

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K

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2 of 5

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View All

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.

Personal Profile

Q

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K

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3 of 5

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|

View All

Dependent/Beneficiary ID

03

Jack DOE

Date of Birth

04/02/2013

Birth Location

Birth Country

Birth State

Date of Death

☐ Riders/Orders exist

Medicare Entitled Date

Riders/Orders

Dependent Proof

☒ Qualified Dependent

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.

Personal History

Q

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K

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1 of 1

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View All

Effective Date

12/10/2024

Relationship to Employee

Child

Dependent Beneficiary Type

Approved Dependent

Gender

Male

Marital Status

Single

☒ Student

☐ Disabled

☐ Smoker

As of

As of

As of

As of

Occupation

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

National ID

Q

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1-1 of 1

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View All

Country	National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number		☒



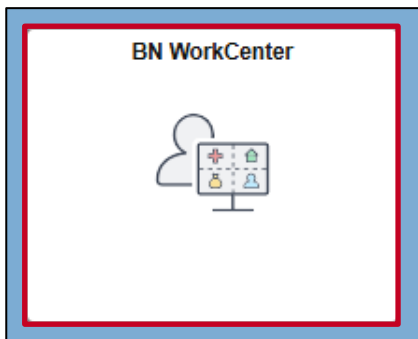
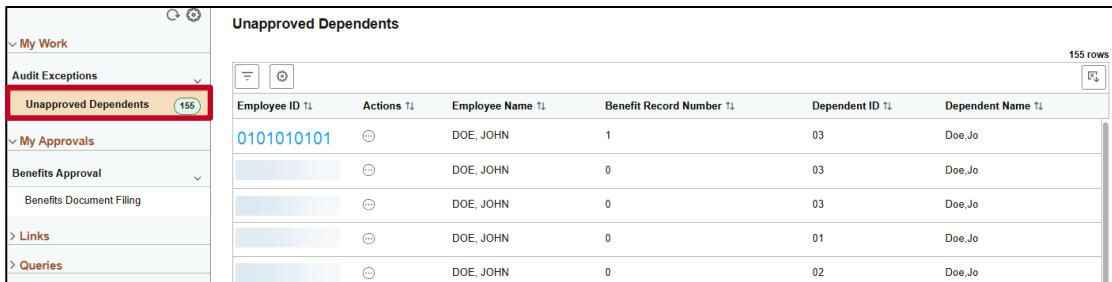
BN361 Managing and Approving Dependents

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. Save Return to Search Previous in List Next in List Notify Update/Display Include History

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. My Work Audit Exceptions Unapproved Dependents 155 My Approvals Benefits Approval Benefits Document Filing Links Queries Unapproved Dependents 155 rows <table><tr><th>Employee ID</th><th>Actions</th><th>Employee Name</th><th>Benefit Record Number</th><th>Dependent ID</th><th>Dependent Name</th></tr><tr><td>0101010101</td><td></td><td>DOE, JOHN</td><td>1</td><td>03</td><td>Doe,Jo</td></tr><tr><td></td><td></td><td>DOE, JOHN</td><td>0</td><td>03</td><td>Doe,Jo</td></tr><tr><td></td><td></td><td>DOE, JOHN</td><td>0</td><td>03</td><td>Doe,Jo</td></tr><tr><td></td><td></td><td>DOE, JOHN</td><td>0</td><td>01</td><td>Doe,Jo</td></tr><tr><td></td><td></td><td>DOE, JOHN</td><td>0</td><td>02</td><td>Doe,Jo</td></tr></table>	Employee ID	Actions	Employee Name	Benefit Record Number	Dependent ID	Dependent Name	0101010101		DOE, JOHN	1	03	Doe,Jo			DOE, JOHN	0	03	Doe,Jo			DOE, JOHN	0	03	Doe,Jo			DOE, JOHN	0	01	Doe,Jo			DOE, JOHN	0	02	Doe,Jo
Employee ID	Actions	Employee Name	Benefit Record Number	Dependent ID	Dependent Name																																
0101010101		DOE, JOHN	1	03	Doe,Jo																																
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		DOE, JOHN	0	01	Doe,Jo																																
		DOE, JOHN	0	02	Doe,Jo																																

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

On-Demand Event Maintenance

Help

JOHN DOE

Person ID

Ben Record 1

Activity Date

Source

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 0

Event Date

Status

Class

Event Status Update

Prepare Options

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

4.	Click the Event Status Update button. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID Event Date Status Class Event Status Update
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Step	Action
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The **BenAdmin Event Status Update** page displays in a pop-up window.

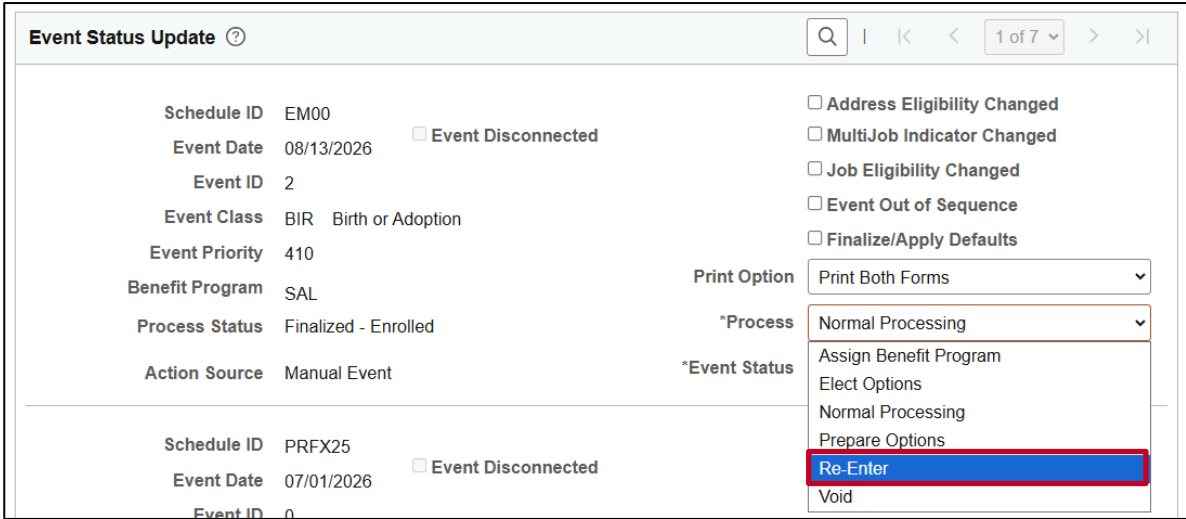
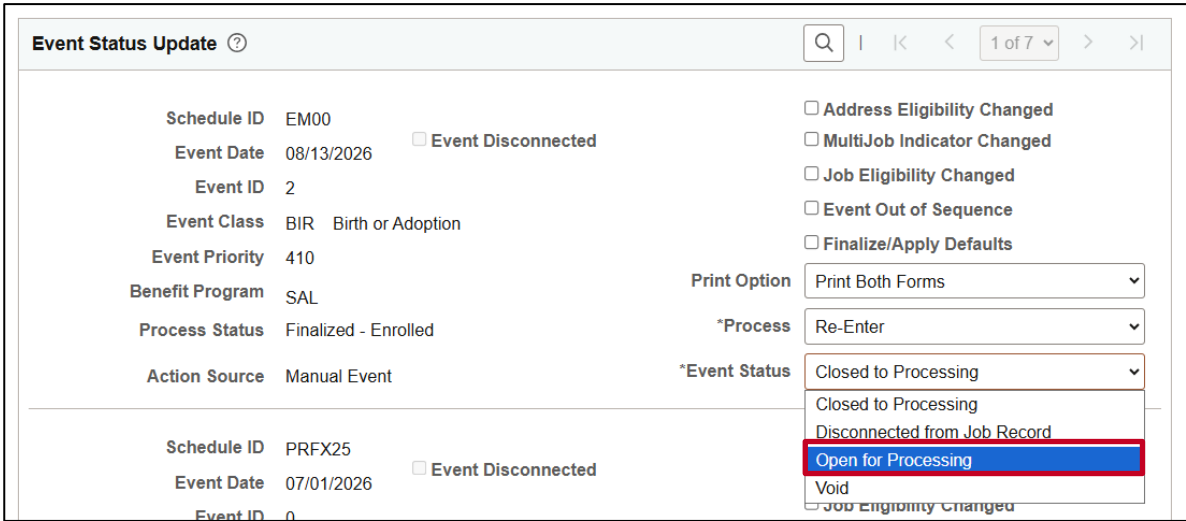
Event Status Update ?		1 of 7
Schedule ID	EM00	☐ Address Eligibility Changed
Event Date	08/13/2026	☐ MultiJob Indicator Changed
Event ID	2	☐ Job Eligibility Changed
Event Class	BIR Birth or Adoption	☐ Event Out of Sequence
Event Priority	410	☐ Finalize/Apply Defaults
Benefit Program	SAL	Print Option: Print Both Forms
Process Status	Finalized - Enrolled	*Process: Normal Processing
Action Source	Manual Event	*Event Status: Closed to Processing
Event Disconnected		
Schedule ID	257COV	☐ Address Eligibility Changed
Event Date	07/01/2025	☐ MultiJob Indicator Changed
Event ID	0	☐ Job Eligibility Changed
Event Class	OE Open Enrollment	☐ Event Out of Sequence
Event Priority	900	☐ Finalize/Apply Defaults
Event Disconnected		Print Option: Print Confirmation Forms Only

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).

Event Status Update ?		1 of 7
Schedule ID	EM00	☐ Address Eligibility Changed
Event Date	08/13/2026	☐ MultiJob Indicator Changed
Event ID	2	☐ Job Eligibility Changed
Event Class	BIR Birth or Adoption	☐ Event Out of Sequence
Event Priority	410	☐ Finalize/Apply Defaults
Benefit Program	SAL	Print Option: Print Both Forms
Process Status	Finalized - Enrolled	*Process: Normal Processing
Action Source	Manual Event	*Event Status: Closed to Processing
Event Disconnected		



Step	Action
6.	Click the Process dropdown button and select “Re-Enter”.  The screenshot shows the 'Event Status Update' form. On the left, there are two event entries. The first entry has Schedule ID EM00, Event Date 08/13/2026, Event ID 2, Event Class BIR (Birth or Adoption), Event Priority 410, Benefit Program SAL, Process Status Finalized - Enrolled, and Action Source Manual Event. The second entry has Schedule ID PRFX25, Event Date 07/01/2026, and Event ID 0. On the right, there are checkboxes for 'Address Eligibility Changed', 'MultiJob Indicator Changed', 'Job Eligibility Changed', 'Event Out of Sequence', and 'Finalize/Apply Defaults'. Below these are two dropdown menus: 'Print Option' (set to 'Print Both Forms') and '*Process' (set to 'Normal Processing'). The '*Event Status' dropdown menu is open, showing options: 'Assign Benefit Program', 'Elect Options', 'Normal Processing', 'Prepare Options', 'Re-Enter' (highlighted with a red border), and 'Void'.
7.	Click the Event Status dropdown button and select “Open for Processing”.  The screenshot shows the same 'Event Status Update' form. The '*Process' dropdown menu is now set to 'Re-Enter'. The '*Event Status' dropdown menu is open, showing options: 'Closed to Processing', 'Closed to Processing', 'Disconnected from Job Record', 'Open for Processing' (highlighted with a red border), and 'Void'. The 'Job Eligibility Changed' checkbox is now visible at the bottom.
8.	Click the OK button at the bottom of the page.  The screenshot shows the bottom of the page with three buttons: 'OK' (highlighted with a red border), 'Cancel', and 'Apply'.

Step	Action
------	--------

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

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 Finalized - Enrolled

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 R

Re-Enter

Save

Return to Search

Notify



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.

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 Finalized - Enrolled

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 R

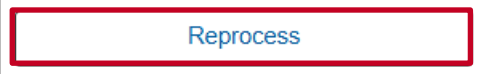
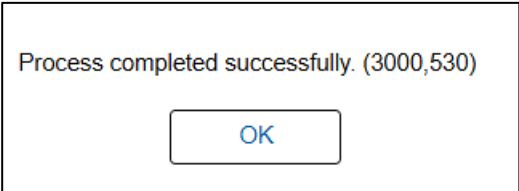
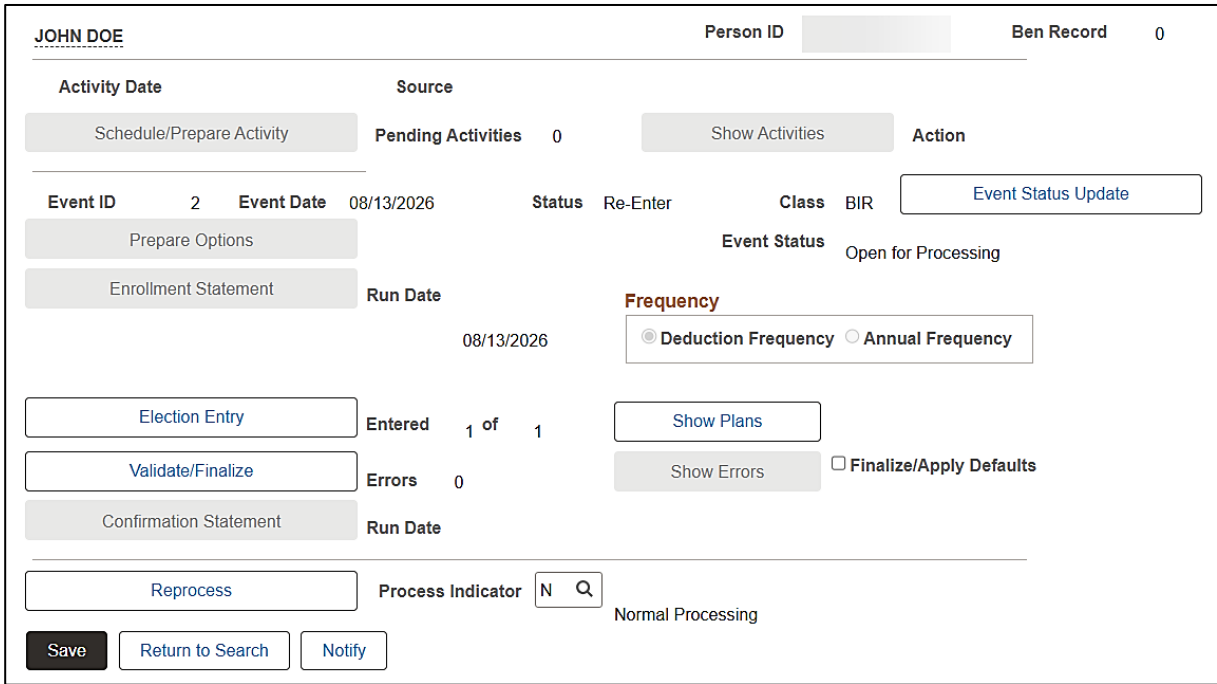
Re-Enter

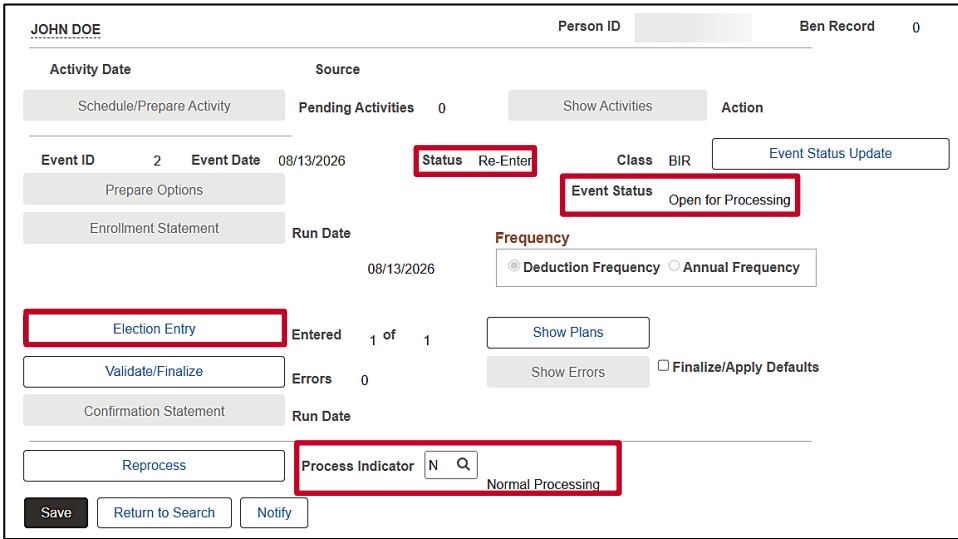
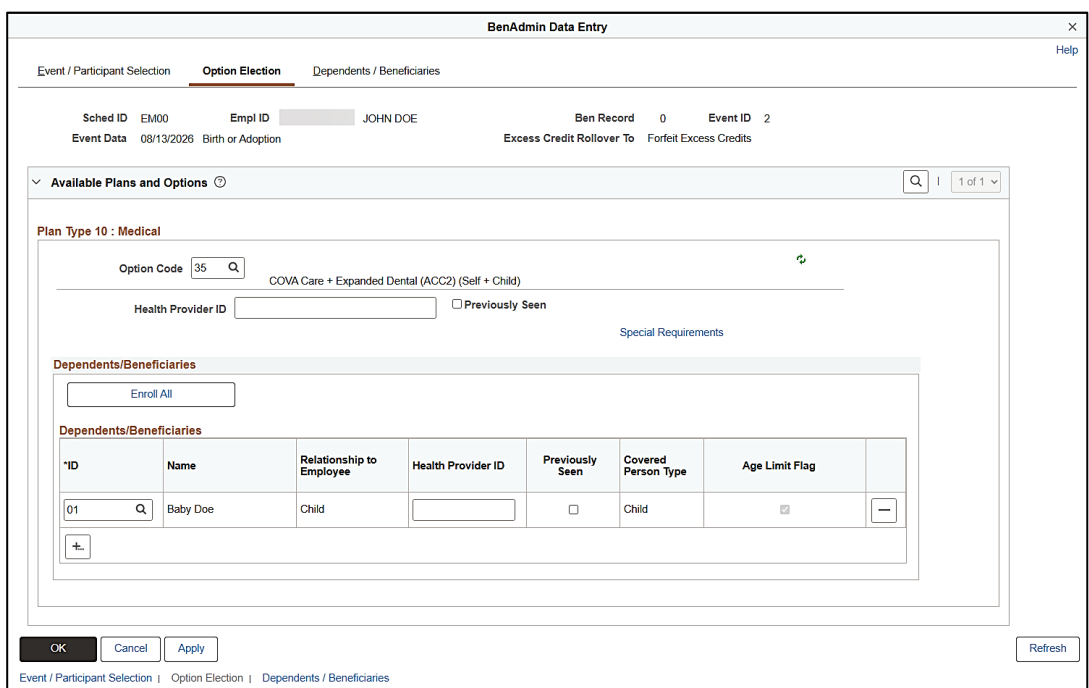
Save

Return to Search

Notify



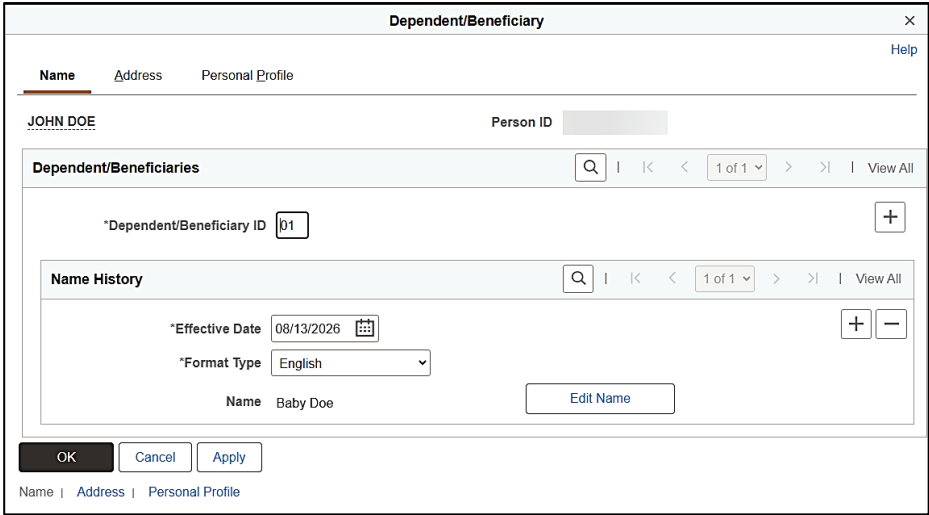
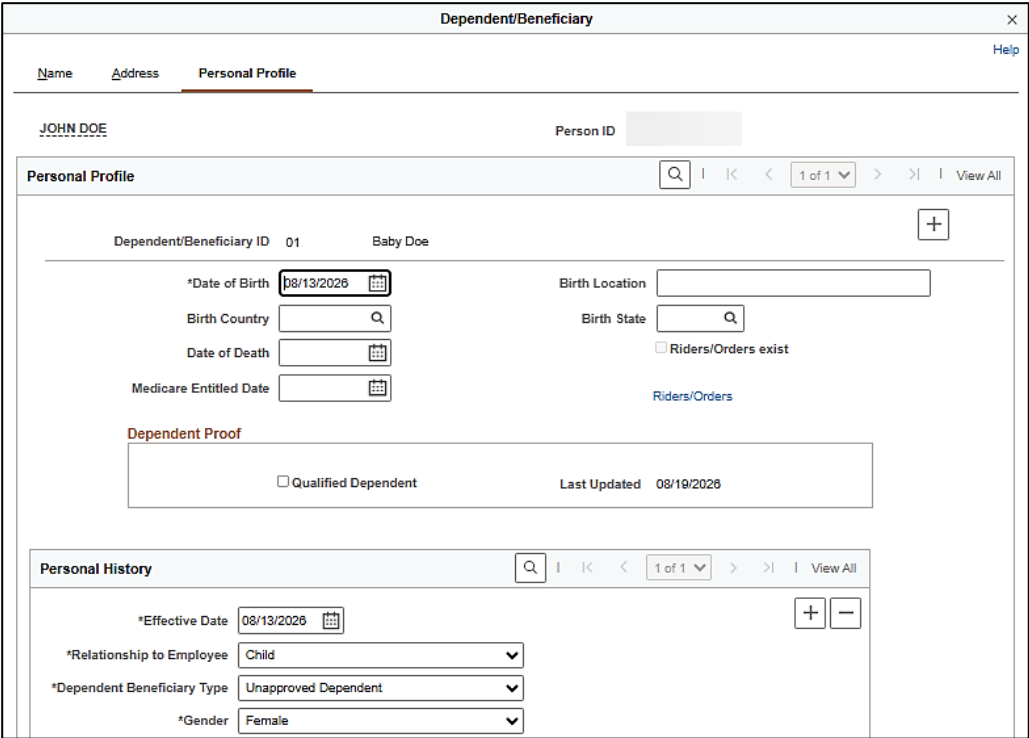
Step	Action
9.	Click the Reprocess button. 
A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	
10.	Click the OK button to close the message. 
The On-Demand Event Maintenance page redisplay. 	

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. 	



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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". Personal History *Effective Date: 08/13/2026 *Relationship to Employee: Child *Dependent Beneficiary Type: Approved Dependent *Gender: Beneficiary *Marital Status: COBRA Dependent Only None QDRO Estate QDRO Representative - Employee QDRO Representative - Recipient Unapproved 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. OK Cancel Apply

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

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID: EM00

Employee ID: JOHN DOE

Event ID: 2

Event Data: 08/13/2026

Benefit Record: 0

Excess Credit Rollover To: Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Baby Doe	Child	Approved Dependent	08/13/2026

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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OK Cancel Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries



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

The **Option Election** tab displays.

BenAdmin Data Entry

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

Sched ID: EM00 | Empl ID: JOHN DOE | Ben Record: 0 | Event ID: 2
Event Data: 08/13/2026 | Birth or Adoption | Excess Credit Rollover To: | Forfeit Excess Credits: |

Available Plans and Options: Plan Type 10: Medical

Option Code: 35 | COVA Care + Expanded Dental (ACC2) (Self + Child)

Health Provider ID: | Previously Seen: ☐ | Special Requirements: [Special Requirements](#)

Dependents/Beneficiaries: [Enroll All](#)

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Baby Doe	Child		☐	Child	☐

OK | Cancel | Apply | Refresh

20.

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

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Baby Doe	Child		☐	Child	☒	—

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

All existing enrollments for this Plan will be deleted to make room for the new entries. (4000,60)

You have selected to mass enroll all eligible Dependents or Beneficiaries. To make room for these automatic enrollments, all existing individual enrollments will first be removed, along with any current election information.

OK | Cancel

21.	Click the OK button. OK Cancel
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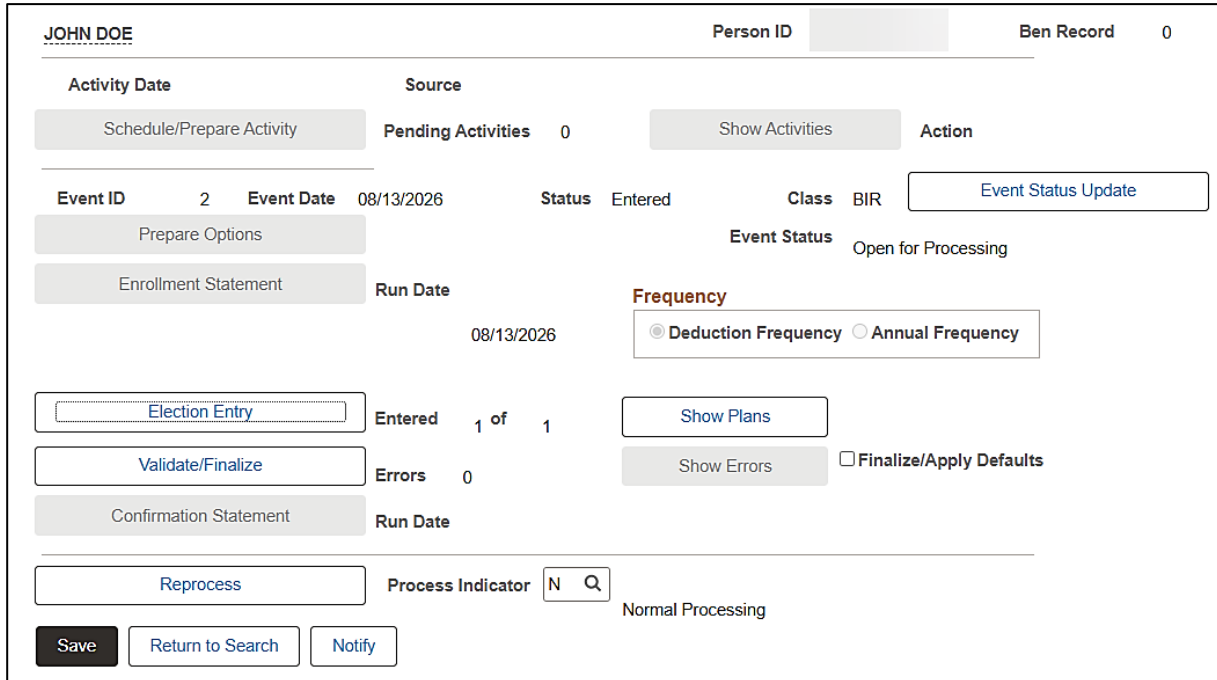


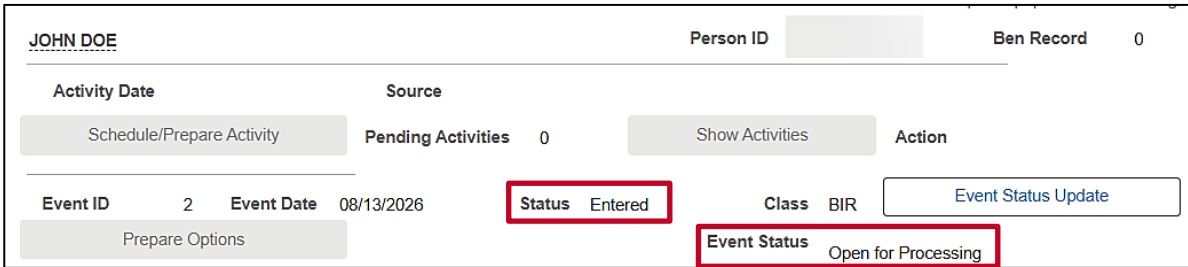
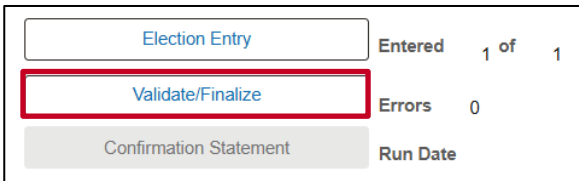
Benefits Job Aid

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

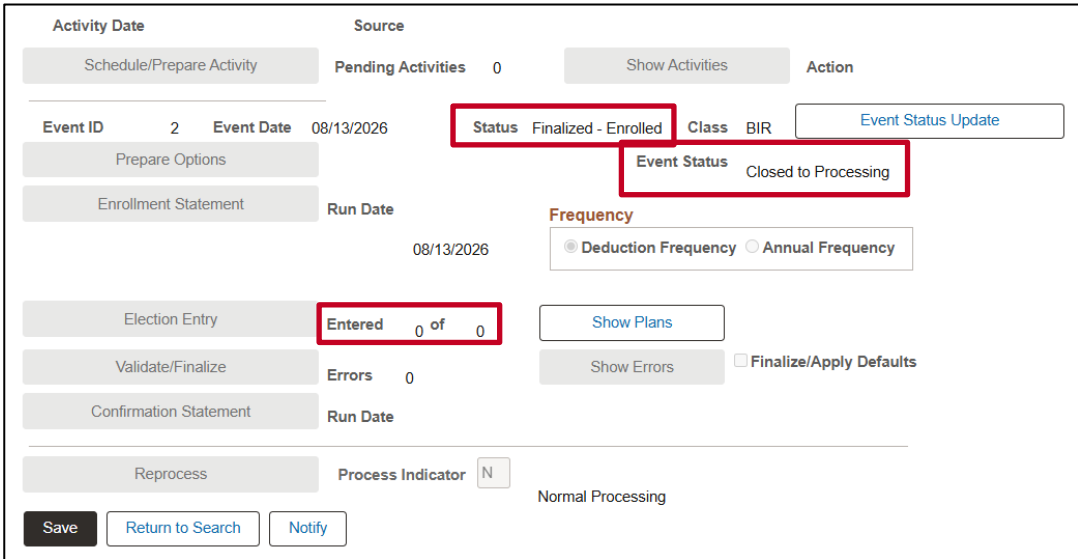
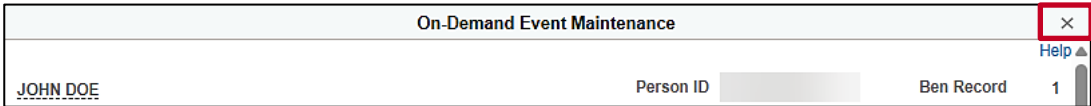
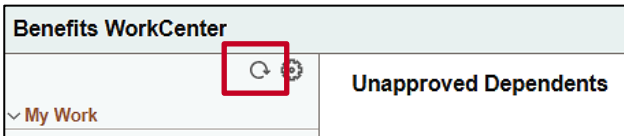
The **On-Demand Event Maintenance** page displays.



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. 



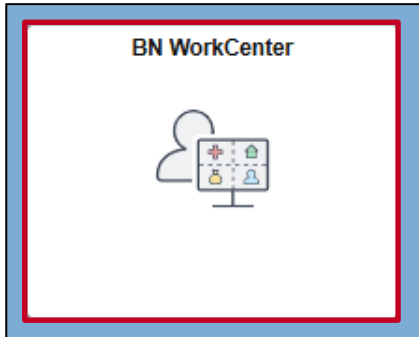
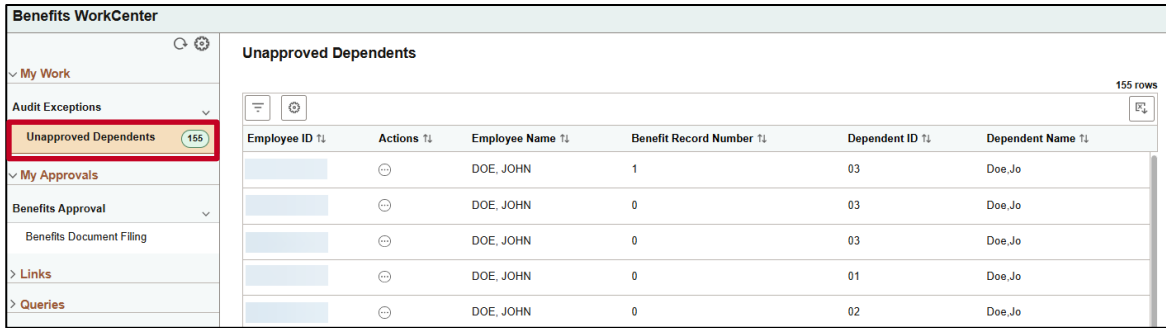
Step	Action
	A Confirmation message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. Process completed successfully. (3000,530) OK
25.	Click the OK button. OK
	The On-Demand Event Maintenance page redisplay. JOHN DOE Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 2 Event Date 08/13/2026 Status Finalized - Enrolled Class BIR Event Status Update Prepare Options Enrollment Statement Run Date 08/13/2026 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
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. 



Benefits Job Aid

BN361 Managing and Approving Dependents

Step

Action

3.

Click the **Employee ID** link of the unapproved dependent.

Unapproved Dependents

155 rows

Employee ID ↕	Actions ↕	Employee Name ↕	Benefit Record Number ↕	Dependent ID ↕	Dependent Name ↕
0101010101	⋮	DOE, JOHN	1	03	Doe,Jo
	⋮	DOE, JOHN	0	03	Doe,Jo
	⋮	DOE, JOHN	0	03	Doe,Jo
	⋮	DOE, JOHN	0	01	Doe,Jo
	⋮	DOE, JOHN	0	02	Doe,Jo

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

On-Demand Event Maintenance × [Help](#)

JOHN DOE Person ID Ben Record 1

Activity Date Source

Pending Activities 0 Action

Event ID 0 Event Date Status Class

Event Status

Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Entered 0 of 0

Errors 0 ☐ Finalize/Apply Defaults

Run Date

Process Indicator Normal Processing

4.	Click the Event Status Update button. <u>JOHN DOE</u> Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID Event Date Status Class Event Status Update
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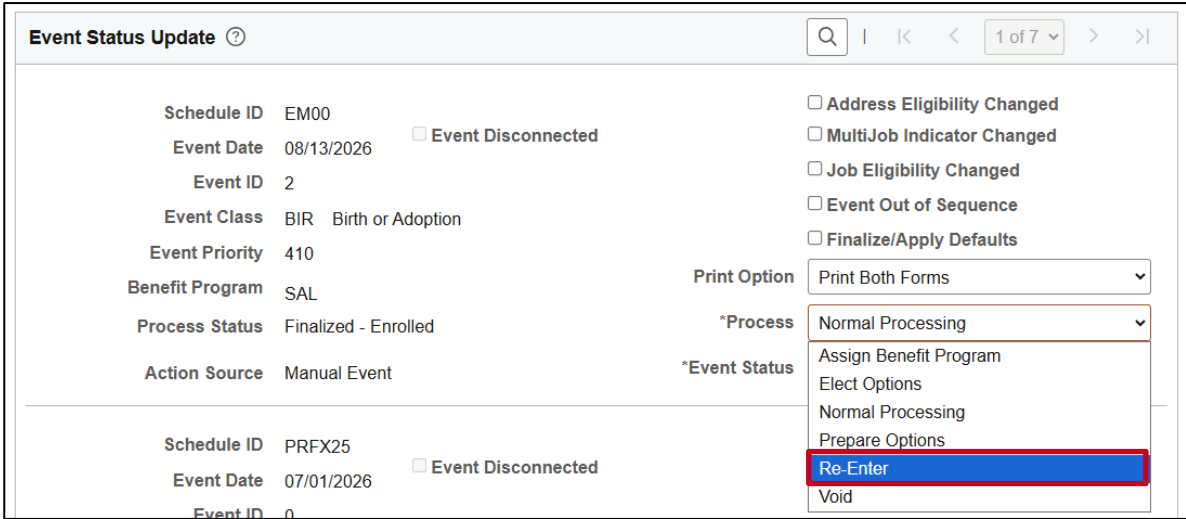
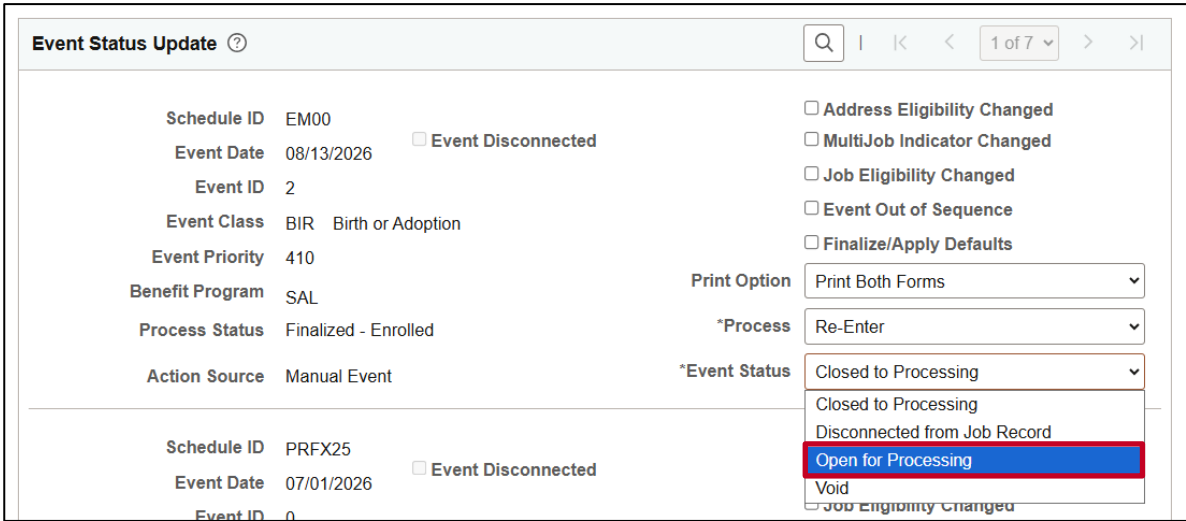


Benefits Job Aid

BN361 Managing and Approving Dependents

Step	Action
	The BenAdmin Event Status Update page displays in a pop-up window. BenAdmin Event Status Update Empl ID JOHN DOE Ben Record 0 Event Status Update ? Schedule ID EM00 Event Date 08/13/2026 Event ID 2 Event Class BIR Birth or Adoption Event Priority 410 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event ☐ Event Disconnected ☐ Address Eligibility Changed ☐ MultiJob Indicator Changed ☐ Job Eligibility Changed ☐ Event Out of Sequence ☐ Finalize/Apply Defaults Print Option Print Both Forms *Process Normal Processing *Event Status Closed to Processing Schedule ID 257COV Event Date 07/01/2025 Event ID 0 Event Class OE Open Enrollment Event Priority 900 ☐ Event Disconnected ☐ Address Eligibility Changed ☐ MultiJob Indicator Changed ☐ Job Eligibility Changed ☐ Event Out of Sequence ☐ Finalize/Apply Defaults Print Option Print Confirmation Forms Only
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). Event Status Update ? Schedule ID EM00 Event Date 08/13/2026 Event ID 2 Event Class BIR Birth or Adoption Event Priority 410 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event ☐ Event Disconnected ☐ Address Eligibility Changed ☐ MultiJob Indicator Changed ☐ Job Eligibility Changed ☐ Event Out of Sequence ☐ Finalize/Apply Defaults Print Option Print Both Forms *Process Normal Processing *Event Status Closed to Processing



Step	Action
6.	Click the Process dropdown button and select “Re-Enter”.  The screenshot shows the 'Event Status Update' form. On the left, there are two event entries. The top entry has Schedule ID EM00, Event Date 08/13/2026, Event ID 2, Event Class BIR (Birth or Adoption), Event Priority 410, Benefit Program SAL, Process Status Finalized - Enrolled, and Action Source Manual Event. The bottom entry has Schedule ID PRFX25, Event Date 07/01/2026, and Event ID 0. On the right, there are checkboxes for 'Address Eligibility Changed', 'MultiJob Indicator Changed', 'Job Eligibility Changed', 'Event Out of Sequence', and 'Finalize/Apply Defaults'. Below these are two dropdown menus: 'Print Option' (set to 'Print Both Forms') and '*Process' (set to 'Normal Processing'). The '*Event Status' dropdown menu is open, showing options: 'Assign Benefit Program', 'Elect Options', 'Normal Processing', 'Prepare Options', 'Re-Enter' (highlighted with a red border), and 'Void'.
7.	Click the Event Status dropdown button and select “Open for Processing”.  The screenshot shows the same 'Event Status Update' form. The '*Process' dropdown menu is now set to 'Re-Enter'. The '*Event Status' dropdown menu is open, showing options: 'Closed to Processing', 'Closed to Processing', 'Disconnected from Job Record', 'Open for Processing' (highlighted with a red border), 'Void', and 'Job Eligibility Changed'.
8.	Click the OK button at the bottom of the page.  The screenshot shows three buttons: 'OK' (highlighted with a red border), 'Cancel', and 'Apply'.

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

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 Finalized - Enrolled

Class BIR

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

Entered 1 of 1

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator R

Re-Enter

Save

Return to Search

Notify



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.

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 Finalized - Enrolled

Class BIR

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency
 ☐ Annual Frequency

Entered 1 of 1

Show Plans

Validate/Finalize

Errors 0

Show Errors

☐ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator R

Re-Enter

Save

Return to Search

Notify



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 redisplay. 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 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. 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

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

BenAdmin Data Entry x Help

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

Sched ID EM00 Empl ID JOHN DOE Ben Record 0 Event ID 2

Event Date 08/13/2026 Birth or Adoption Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options Q | 1 of 1

Plan Type 10 : Medical

Option Code 35 COVA Care + Expanded Dental (ACC2) (Self + Child)

Health Provider ID ☐ Previously Seen Special Requirements

Dependents/Beneficiaries

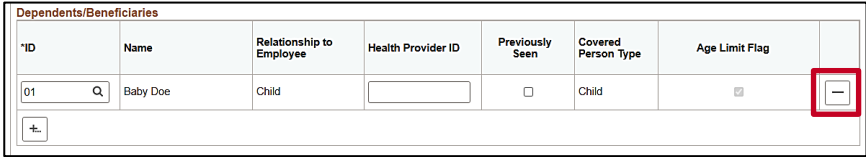
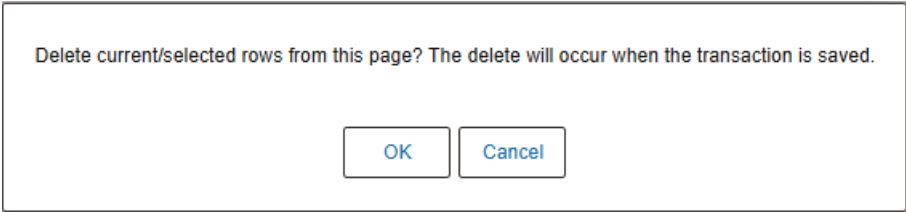
Enroll All

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01 Q	Baby Doe	Child		☐	Child	☒ -
+						

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries



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. 



Benefits Job Aid

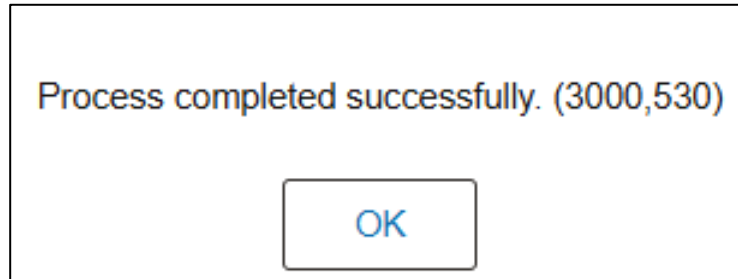
BN361 Managing and Approving Dependents

Step	Action
	The On-Demand Event Maintenance page redisplay. 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 Entered Class BIR Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency Deduction Frequency Annual Frequency Election Entry Entered 1 of 1 Show Plans Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults Confirmation Statement Run Date Reprocess Process Indicator N Q Normal Processing Save Return to Search Notify

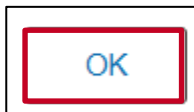


Step	Action
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A **Confirmation** message displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully.



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

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 Finalized - Enrolled Class BIR Event Status Update

Prepare Options Event Status Closed to Processing

Enrollment Statement Run Date 08/13/2026 Frequency Deduction Frequency Annual Frequency

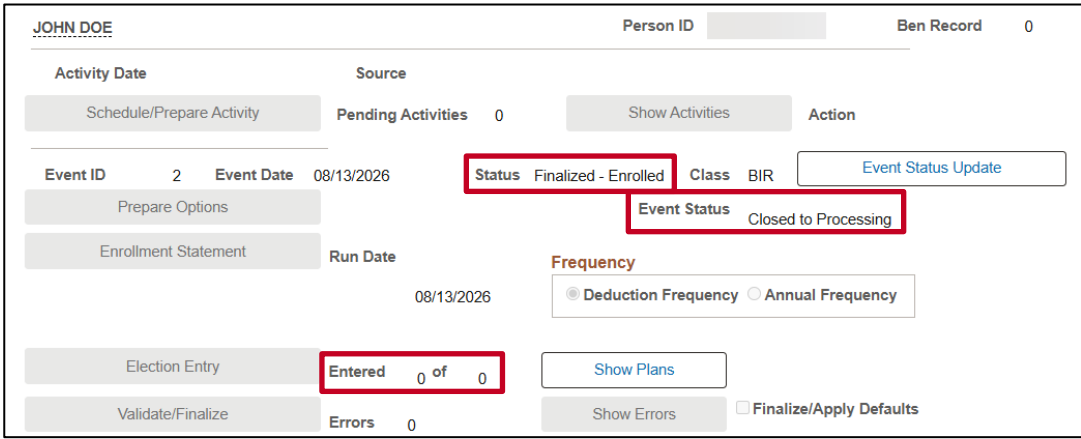
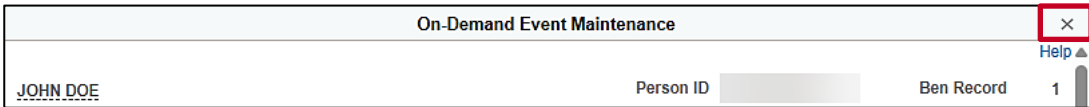
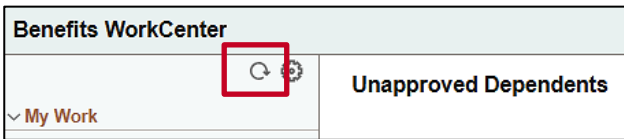
Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

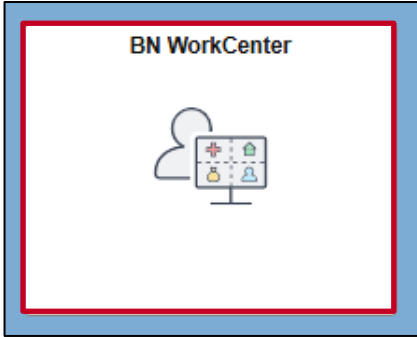
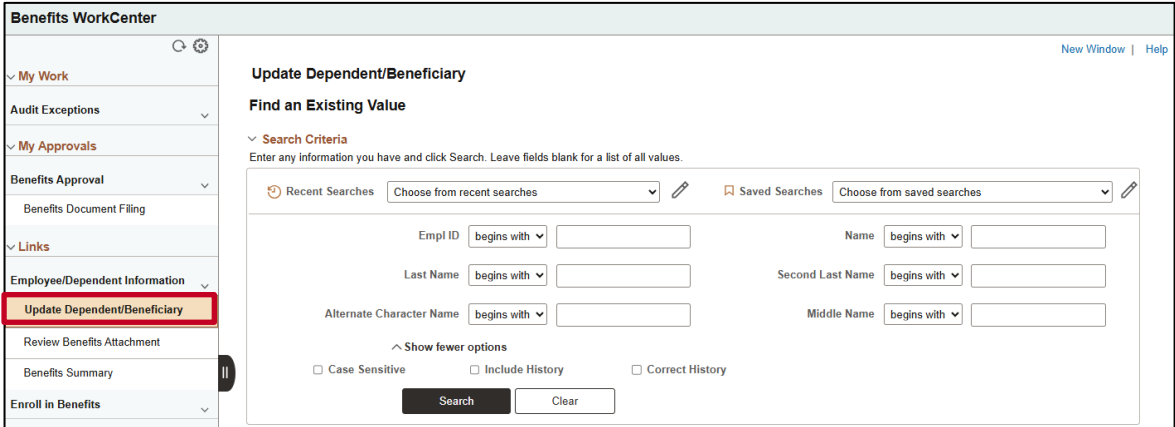
Step	Action
19.	Confirm that the Status field now displays as “Finalized-Enrolled” and the Event Status field is now “Closed to Processing”. Note: The number of elections entered will reset back to “0 of 0”. 
20.	Click the Close button (X) to close the window. 
21.	Refresh the list by clicking the Refresh 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.

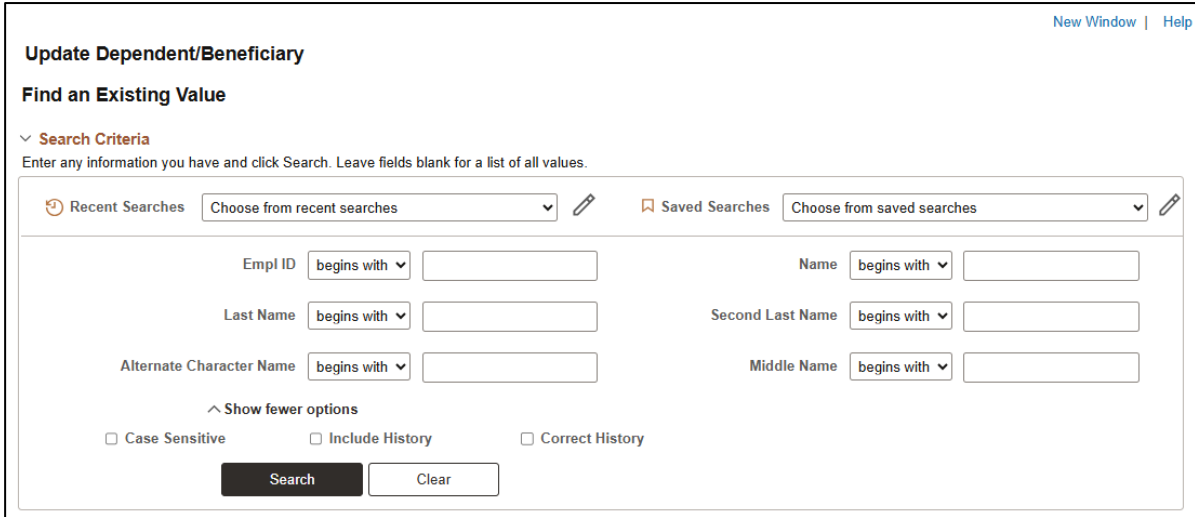
Managing Dependent Personal Information

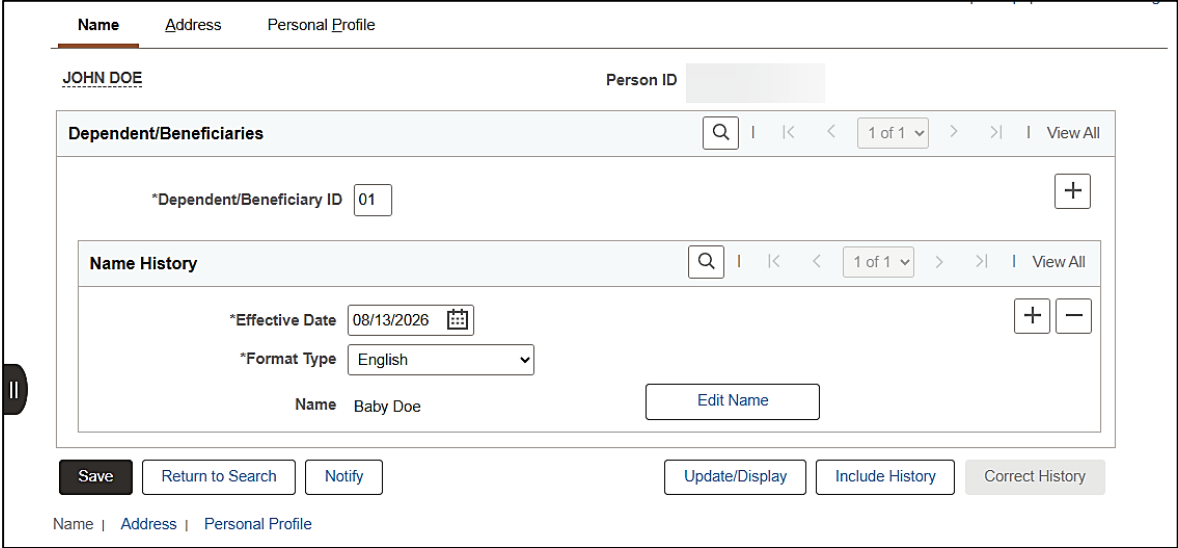
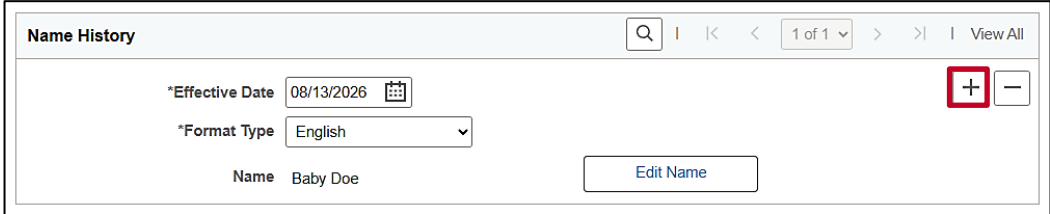
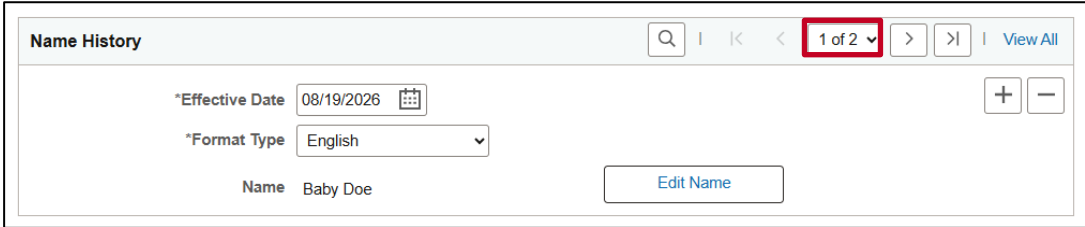
If a Benefit Event has been finalized and the dependent is enrolled, changes can be made by re-opening the Benefit Event and making the necessary changes. For more information on re-opening and reprocessing a Benefit Event, refer to the Job Aid titled **BN361 Re-opening and Reprocessing a Benefit Event**. 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.

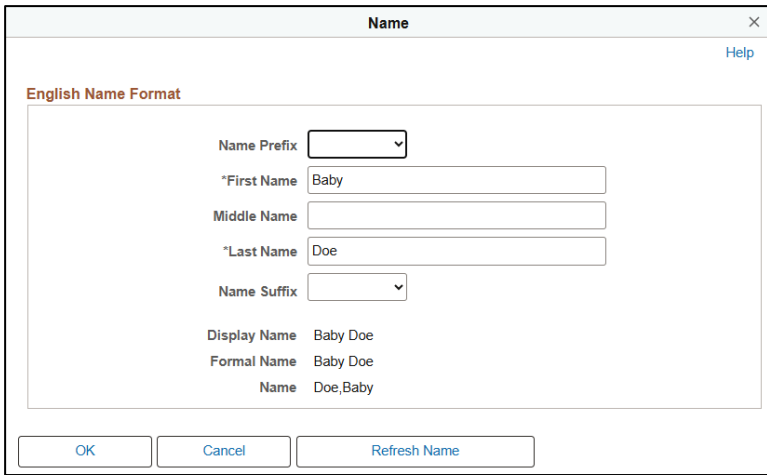
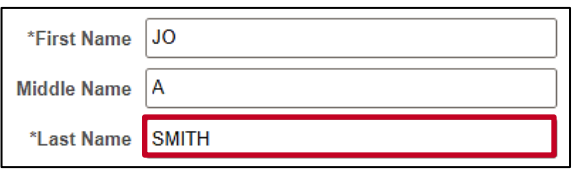
If no Benefit Event is available, changes must be made on the **Update Dependent/Beneficiary** page. All updates will be sent to the Vendors on the Monthly Reconciliation File which is sent on the first Monday of each month.

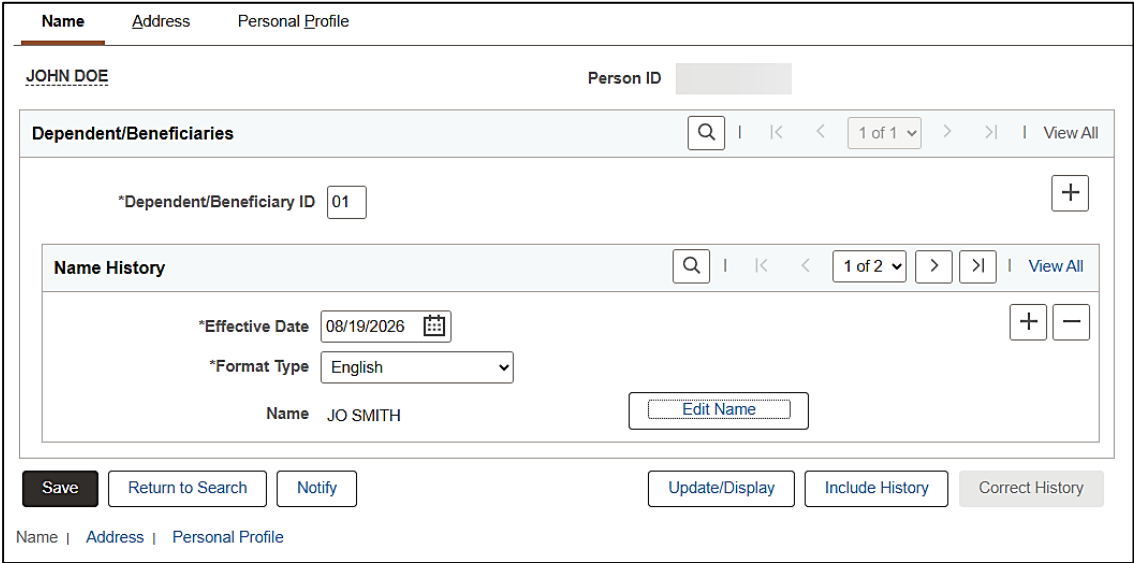
In this scenario, there is no Benefit Event available to make the changes.

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 redisplay 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 redispays with the Display Name field updated in the Name History section. 
11.	Click the Save button. 