Completing a New Hire Enrollment Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to complete a new hire enrollment on behalf of the employee. This process is performed on the **On-Demand Event Maintenance** page after the employee submits their Benefits Enrollment form to the BA with all the information necessary to complete the process.

Hire (HIR and HR2) Benefit Events are triggered after the HR new hire transactions are completed by an Agency HR Administrator.

The HR2 Benefit Event will automatically enroll the eligible employee in the Imputed Life Insurance Income Plan after the Benefits Administration process runs and then the HR2 Benefit Event will automatically close. The Benefits Administration process runs periodically on a schedule. This must be completed prior to completing the employee's other enrollments via the HIR Benefit Event.   If the Agency BA needs to process the HIR Benefit Event before the Benefits Administration process has run, the HR2 Benefit Event can be manually closed. This Job Aid contains the steps used to manually close the HR2 Benefit Event.

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

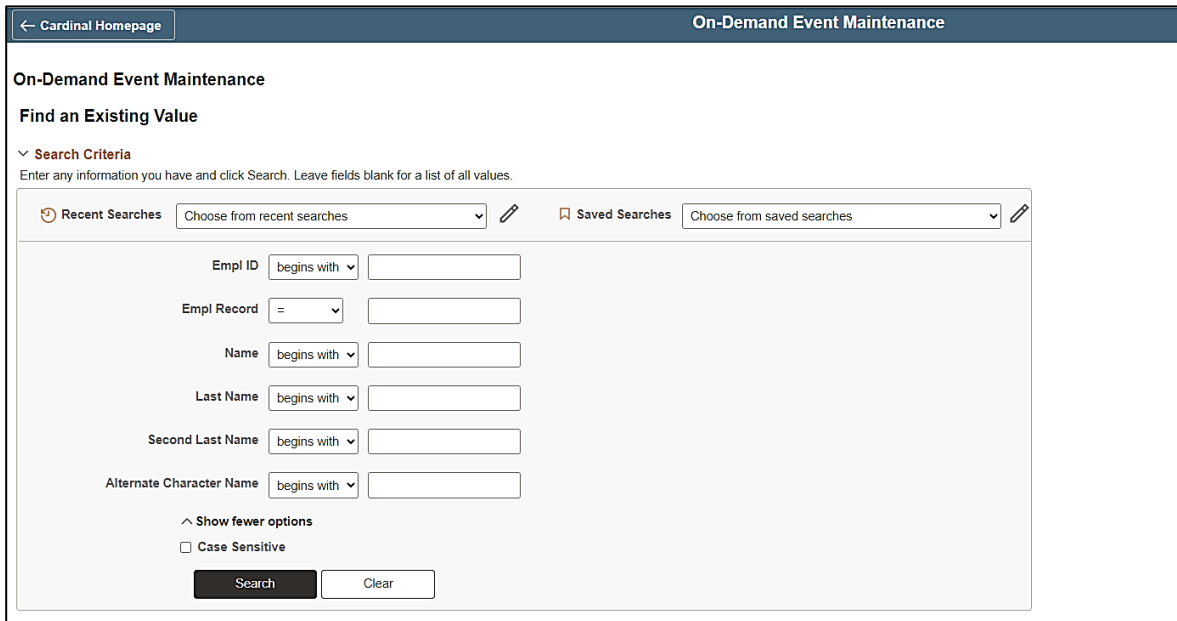## Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Completing a New Hire Benefit Enrollment

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** page displays.
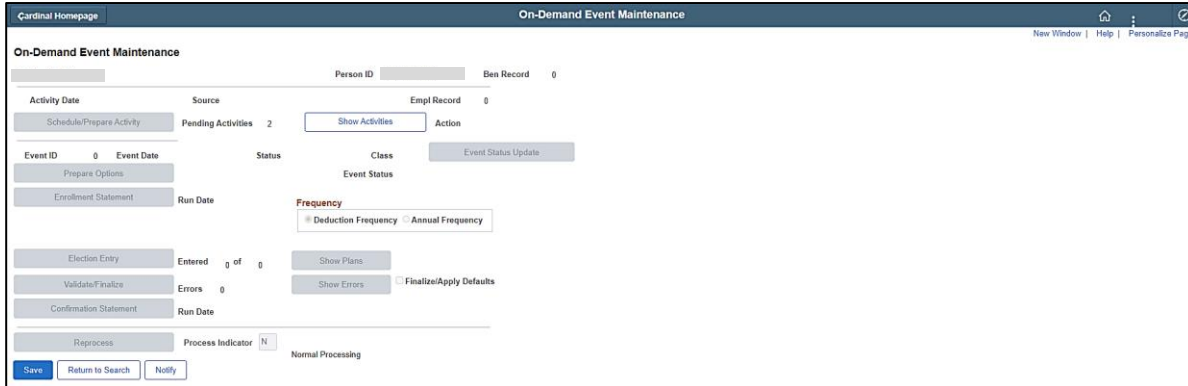
ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field.
ℹ	Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.
3.	Click the **Search** button.

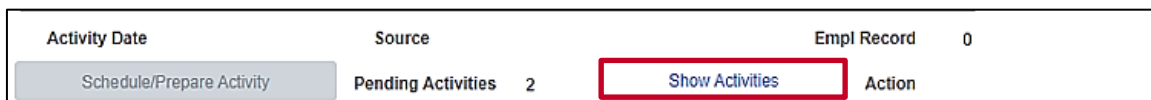| Step	Action
	The **On-Demand Event Maintenance** page displays for the applicable employee.
4.	Review the **Pending Activities** field and proceed based on the following: • If the **Pending Activities** field displays a "2", the Benefits Administration process has not run and the HR2 Benefit Event has not been automatically processed and closed. Proceed with Step 5 • If the **Pending Activities** field displays a "1", the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed but the "HIR" Benefit Event has not been prepared. Proceed with Step 10 • If the **Pending Activities** field displays a "0", the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed. Additionally, the "HIR" Benefit Event has been prepared. Proceed with Step 12
5.	Click the **Show Activities** button.
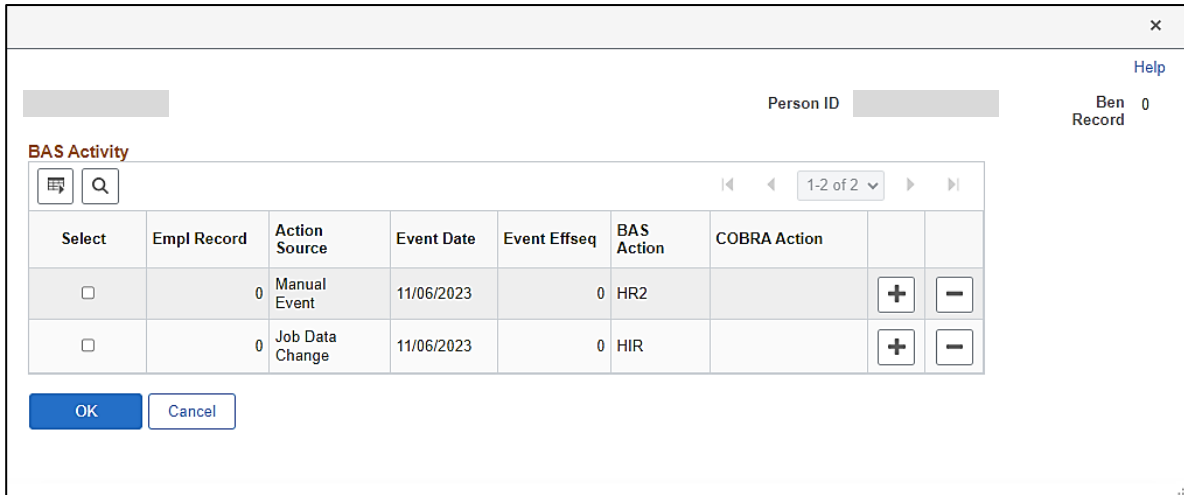
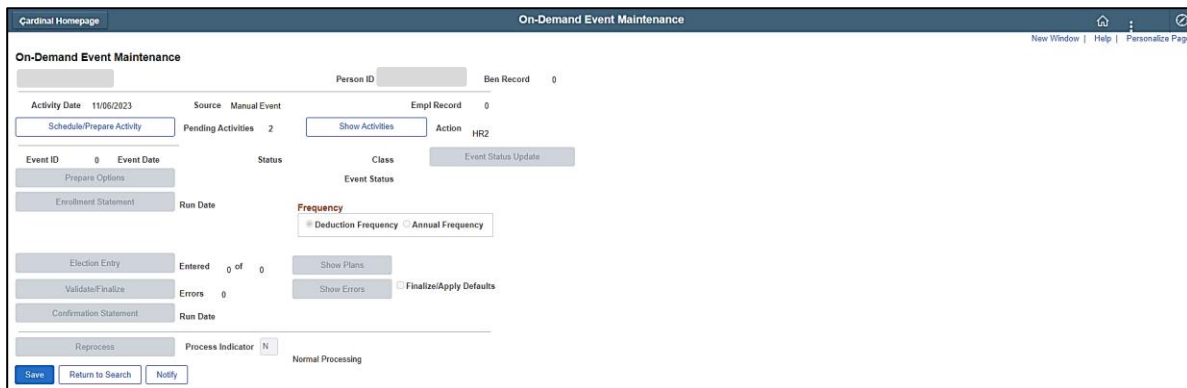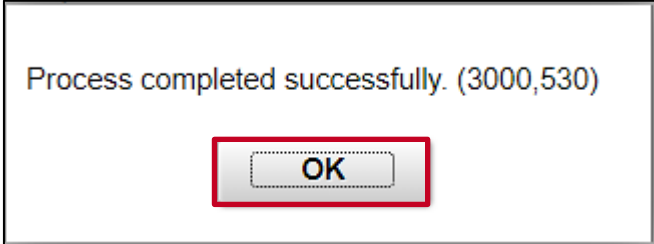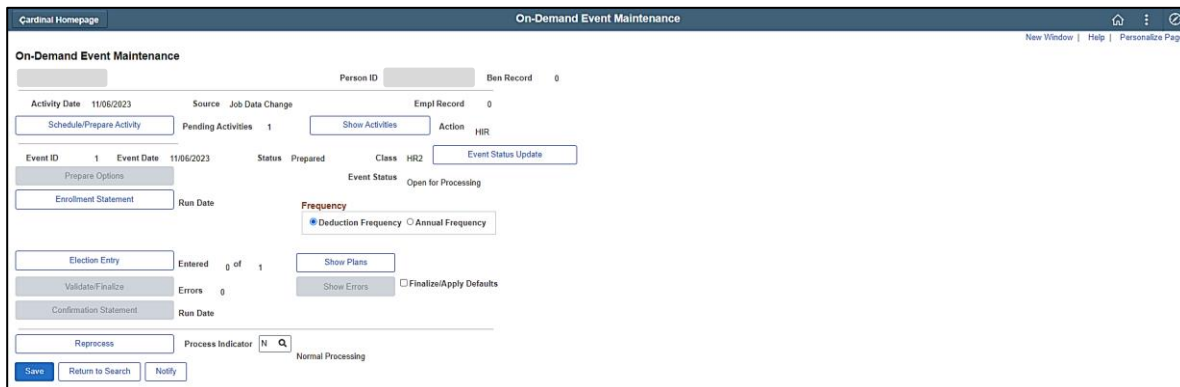| Step	Action
	The **BAS Activity** page displays in a pop-up window.
6.	Click the **Select** checkbox option for the HR2 Benefit Event.
7.	Click the **OK** button.
	The **On-Demand Event Maintenance** page redisplays.

Step	Action
ℹ️	Review the **Activity Date** field. This is the date of the employee's New Hire transaction completed by HR. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with your Agency HR to correct prior to processing the new hire benefits enrollment. For HR2 Benefit Events, the **Source** field will be "Manual Event" and the **Action** field will be "HR2". Activity Date 09/16/2024 Source Manual Event Empl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HR2
8.	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. Activity Date 09/16/2024 Source Manual Event Empl Record 0 Schedule/Prepare Activity Pending Activities 2 Show Activities Action HR2
9.	A **Confirmation** message displays in a pop-up window once the automated program completes. Click the **OK** button to close the message. Process completed successfully. (3000,530) OK

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

Step	Action
ℹ️	Review the **Activity Date** field. This is the date of the employee's New Hire transaction completed by HR. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with Agency HR to correct prior to processing the new hire benefits enrollment. For HIR Benefit Events, the **Source** field will be "Job Data Change" and the **Action** field will be "HIR". Activity Date 09/16/2024 Source Job Data Change Empl Record 0 Schedule/Prepare Activity Pending Activities 1 Show Activities Action HIR
10.	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. Activity Date 09/16/2024 Source Job Data Change Empl Record 0 Schedule/Prepare Activity Pending Activities 1 Show Activities Action HIR
11.	A **Confirmation** message displays in a pop-up window once the automated program completes. Click the **OK** button to close the message. Process completed successfully. (3000,530) OK

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

Step	Action
ℹ	Confirm that the **Status** field displays as "Prepared" and the **Event Status** field displays as "Open for Processing". Thomas Jones35 — Person ID 00858059200 — Ben Record 0 Activity Date — Source — Empl Record 0 Schedule/Prepare Activity — Pending Activities 0 — Show Activities — Action Event ID 1 — Event Date 10/25/2022 — **Status Prepared** — Class HIR — Event Status Update Prepare Options — **Event Status Open for Processing** Enrollment Statement — Run Date — Frequency: ⦿ Deduction Frequency ○ Annual Frequency
12.	Click the **Election Entry** button. Event ID 2 — Event Date 09/16/2024 — 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

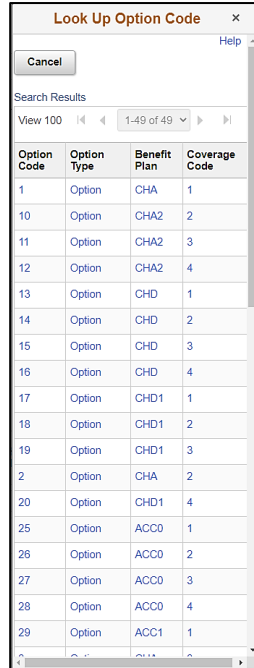| Step	Action
	The **BenAdmin Data Entry** page displays in a pop-up window with the **Option Election** tab displayed by default. **BenAdmin Data Entry** Event / Participant Selection Option Election Dependents / Beneficiaries Sched ID EM00 Empl ID Ben Record 0 Event ID 1 Event Data 10/25/2022 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits **Available Plans and Options** 1 of 5 **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	| **Plan Type 23 : Imputed Life**
13.	First, select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section. **Plan Type 10 : Medical** Option Code

Step	Action
	The **Look Up Option Code** page displays in a pop-up window.
14.	Select the applicable Benefit Plan and Coverage Code (based on the employee's Benefits Enrollment form) by clicking the corresponding link in the **Option Code** column (Benefit Plan "ACC0" with Coverage Code "4" will be selected in this example). The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child (except for Tricare), and 4 – Employee + 2 or More Dependents (Family -except for Tricare), 8 – Employee + Child(ren) (Tricare only), and 9 – Family (EE + SP +Child/ren for Tricare only).

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

| | If the employee is single and elected a Benefit Plan with a Coverage Code of "1", skip to Step 38. If the employee selected a Benefit Plan with any other Coverage Code, the employee's dependent(s) must be added. Proceed with Step 15. |

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

BenAdmin Data Entry ✕

Help

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

Schedule ID   EM00   Employee ID [   ] [   ]
Event ID   1   Event Data 10/25/2022   Initial Enrollment
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	

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents	

[OK] [Cancel] [Apply]   [Refresh]

Event / Participant Selection | Option Election | Dependents / Beneficiaries

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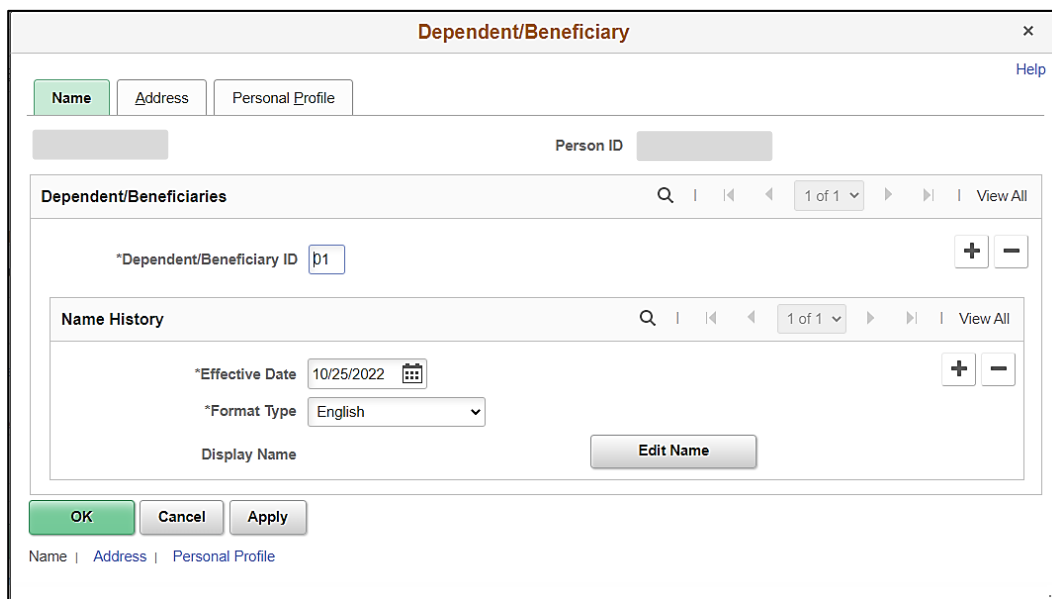
The **Dependent / Beneficiaries** tab displays.
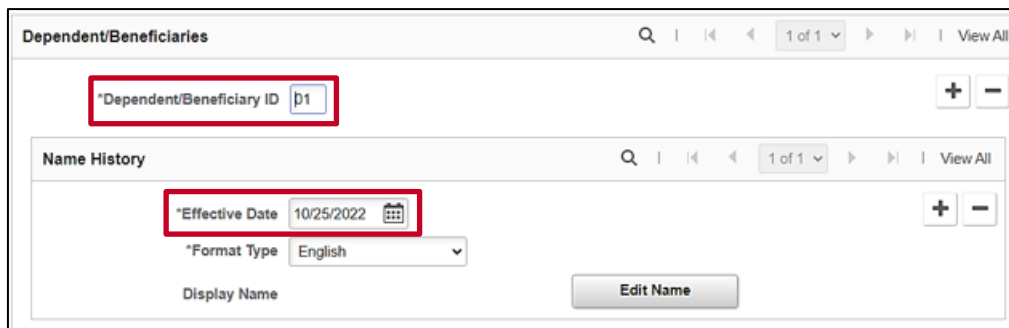
BenAdmin Data Entry ✕

Help

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

Schedule ID   EM00   Employee ID [   ] [   ]
Event ID   1   Event Data 10/25/2022   Initial Enrollment
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	

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents	

[OK] [Cancel] [Apply]   [Refresh]

Event / Participant Selection | Option Election | Dependents / Beneficiaries
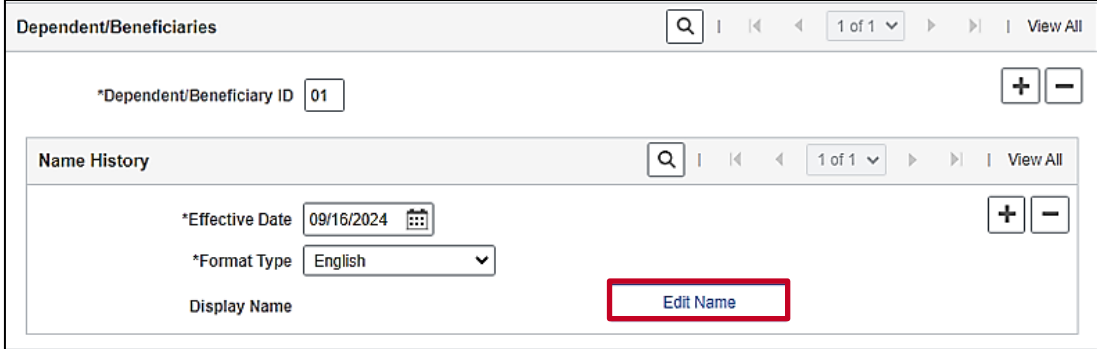
Step	Action
16.	Click the **Change/Add Dependent Data** link.

The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.
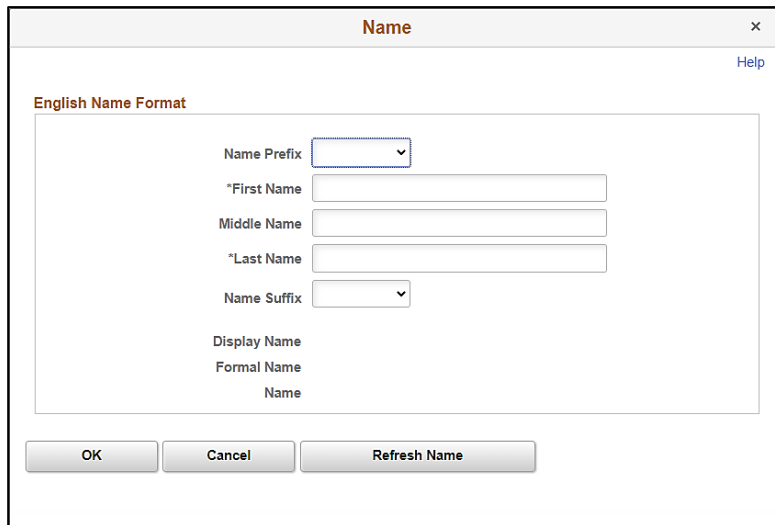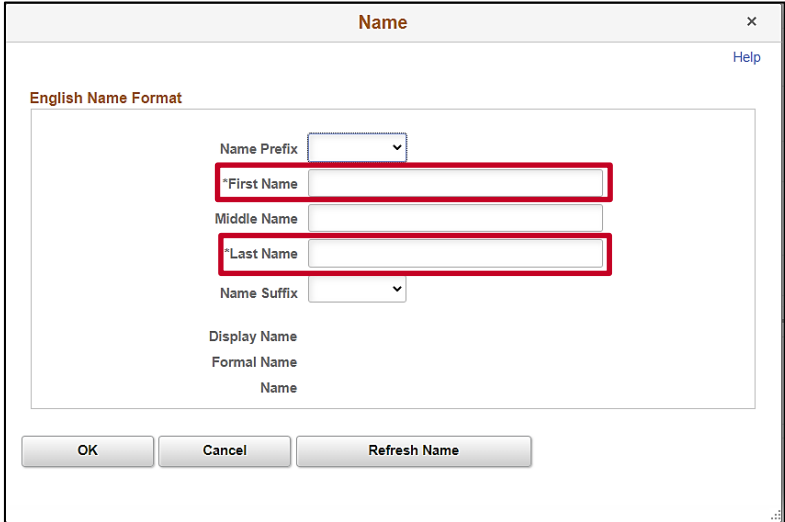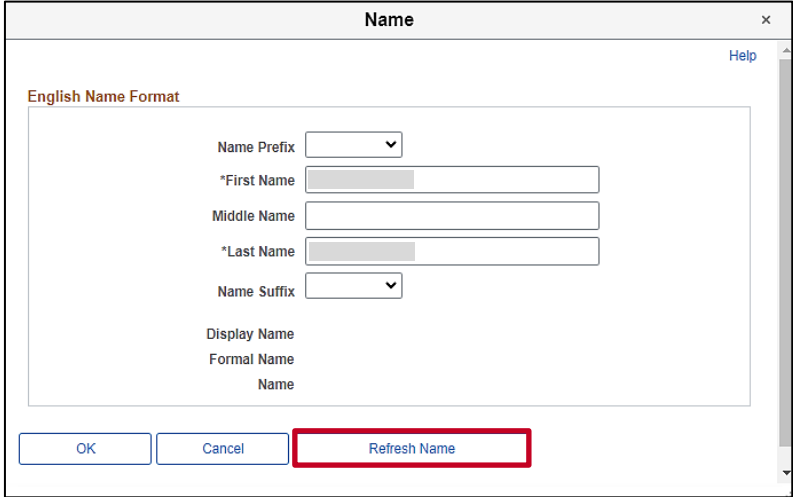
The **Effective Date** field defaults to the Event Date (employee's hire date for new hire enrollments). This date must be on or before the new hire event date and should not be updated. The **Dependent/Beneficiary ID** field will default to "01" for the first dependent and increment by 1 for each additional dependent subsequently added.

Step	Action
17.	Click the **Edit Name** button.

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

Step	Action
18.	At a minimum, enter the dependent's **First** and **Last Name** in the corresponding fields. The **Name Prefix**, **Middle Name**, and **Name Suffix** fields are optional but should be entered as applicable.
19.	Click the **Refresh Name** button.

Step	Action
	The **Name** page refreshes.
	Name ✕
	Help
	English Name Format
	Name Prefix ▼
	*First Name
	Middle Name
	*Last Name
	Name Suffix ▼
	Display Name
	Formal Name
	Name
	OK Cancel Refresh Name
ⓘ	The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.
20.	Click the **OK** button.
	OK Cancel Apply
	Event / Participant Selection | Option Election | Dependents / Beneficiaries

Step	Action
	The **Name** tab redisplays.
(i)	The **Display Name** field auto-populates with the name information previously entered.

Step	Action
21.	Click the **Address** tab at the top of the page.

The **Address** tab displays.
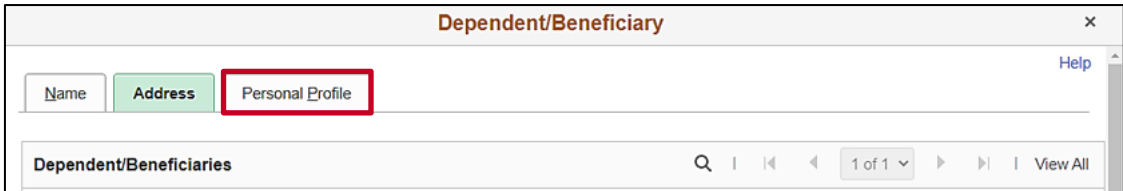
Step	Action
22.	Complete the address information as applicable for the dependent by either: • Clicking the **Same Address as Employee** checkbox option (applicable for this example) or • Selecting the applicable **Address Type** using the dropdown button provided and then clicking the **Edit Address** button (the **Edit Address** page will display in a pop-up window and the applicable address information can be entered)

The **Address** tab refreshes. The Address information auto-populates in the **Employee's Current Address** section.

Step	Action
23.	Click the **Personal Profile** tab at the top of the page.

The **Personal Profile** tab displays.
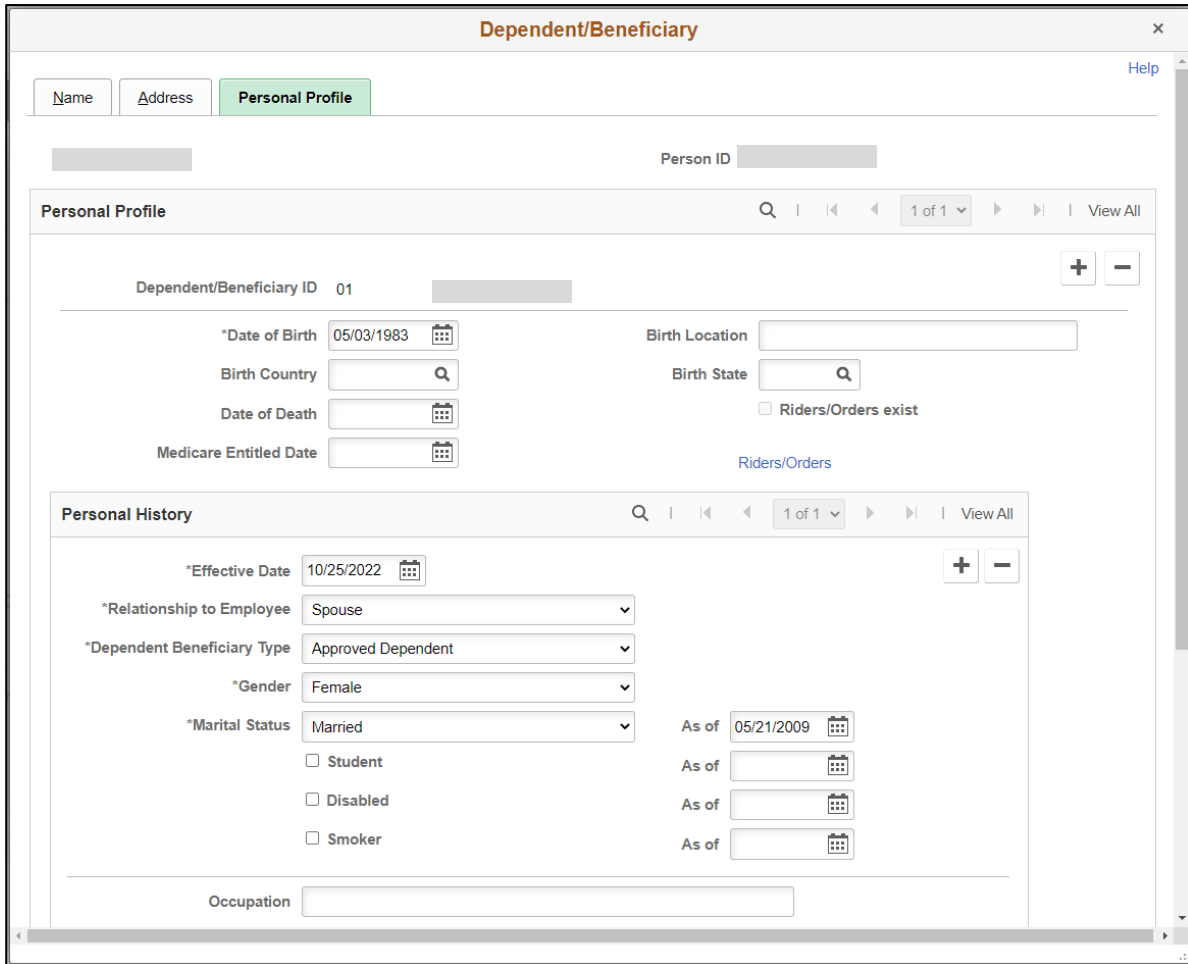
| | The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor). |

Step	Action
24.	Click the **Date of Birth Calendar** icon and select the dependent's date of birth. *Date of Birth [ ] 🗓
25.	Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee. *Relationship to Employee [⌄]
26.	Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent" *Dependent Beneficiary Type [⌄]
27.	Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female"). *Gender [Unknown ⌄]
28.	The **Marital Status** field defaults to "Single". Updated as needed for the dependent. *Marital Status [Single ⌄]
29.	If any status other than "Single" is selected, the **Marital Status As of** field will default to the date of hire and must be updated as applicable using the **Marital Status As of Calendar** icon. *Marital Status [Married ⌄] As of [09/16/2024 🗓]

Step	Action
	The updated **Dependent/ Beneficiary** page displays.
30.	Scroll down to the **National ID** section of the page.

Step	Action
	The bottom of the **Dependent/ Beneficiary** page displays.
31.	Enter the dependent's Social Security Number (SSN) in the **National ID** field. If the employee did not provide the dependent's SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the **Base Benefits Consistency Audit** report to monitor dependents with a missing SSN.

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

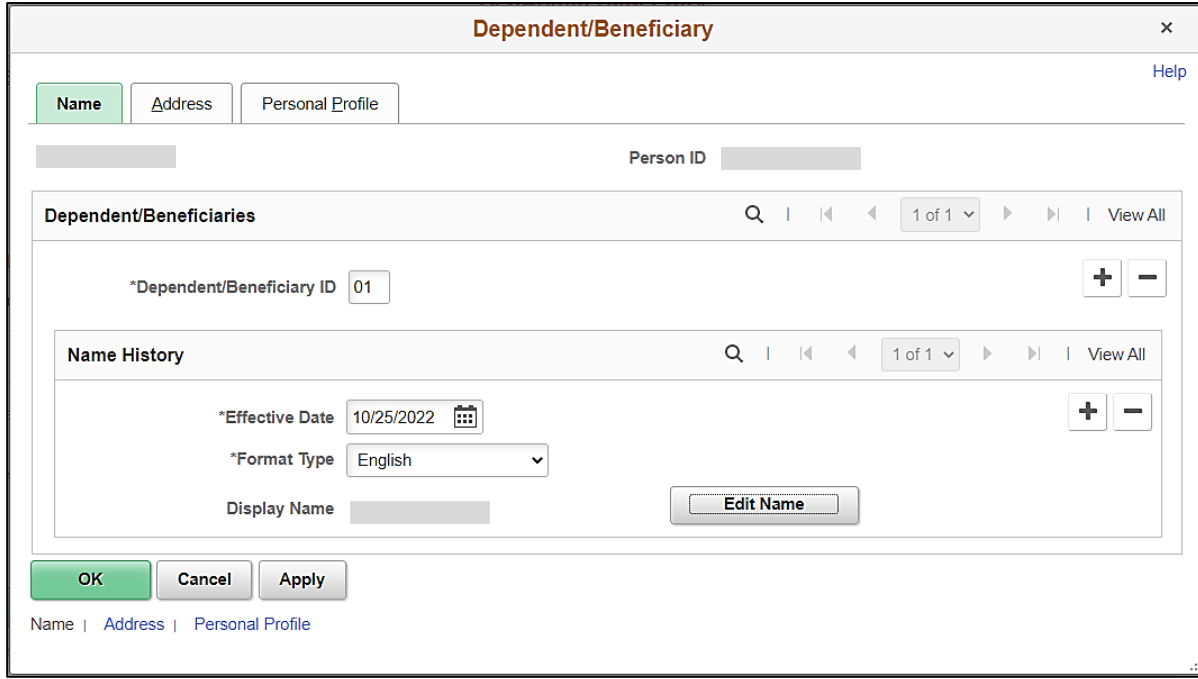|	The **Dependents / Beneficiaries** tab redisplays.
	If additional dependents need to be added, continue with Step 33. If no additional dependents need to be added, skip to Step 38.

Step	Action
33.	Click the **Change/ Add Dependent Data** link.

Step	Action
	The **Name** tab redisplays. **Dependent/Beneficiary** ✕ Help [Name] [Address] [Personal Profile] Person ID ▢ **Dependent/Beneficiaries** 🔍 ❘ ⏮ ◀ 1 of 1 ▾ ▶ ⏭ ❘ View All *Dependent/Beneficiary ID 01 ➕ ➖ **Name History** 🔍 ❘ ⏮ ◀ 1 of 1 ▾ ▶ ⏭ ❘ View All ➕ ➖ *Effective Date 10/25/2022 📅 *Format Type English ▾ Display Name ▢ [Edit Name] [OK] [Cancel] [Apply] Name ❘ Address ❘ Personal Profile
34.	Click the **Add a New Row** icon (**+**) within the **Dependent/Beneficiaries** section. **Dependent/Beneficiaries** 🔍 ❘ ⏮ ◀ 1 of 1 ▾ ▶ ⏭ ❘ View All *Dependent/Beneficiary ID 01 ➕ ➖
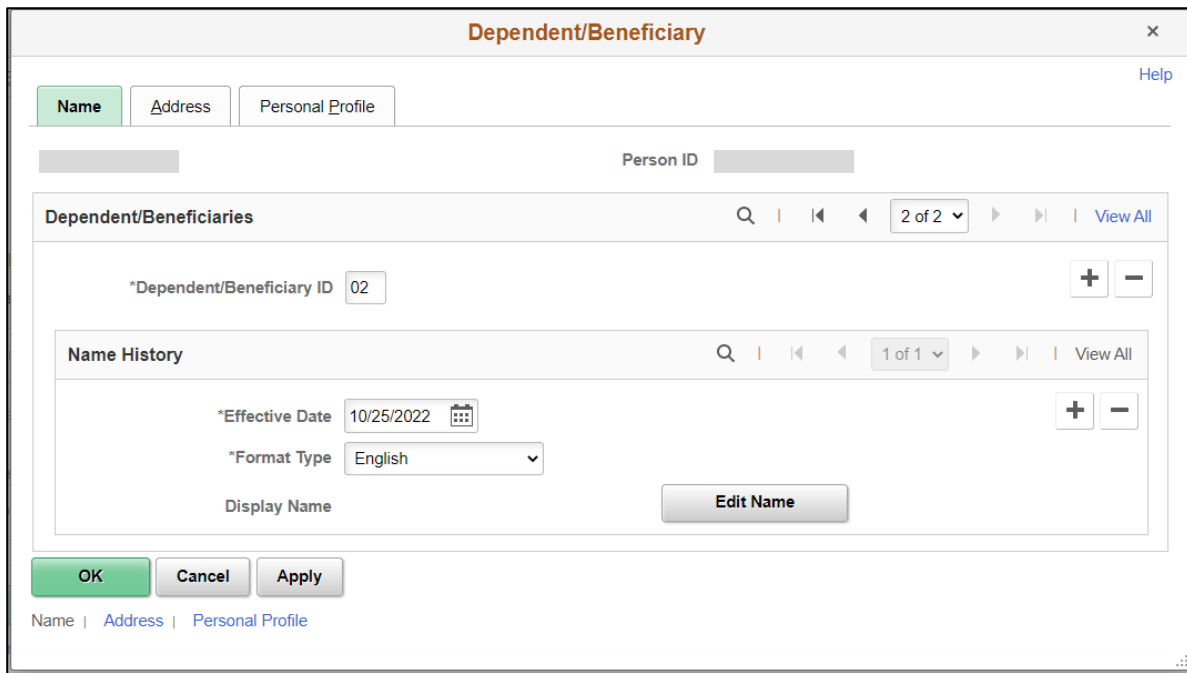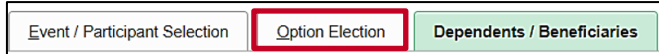
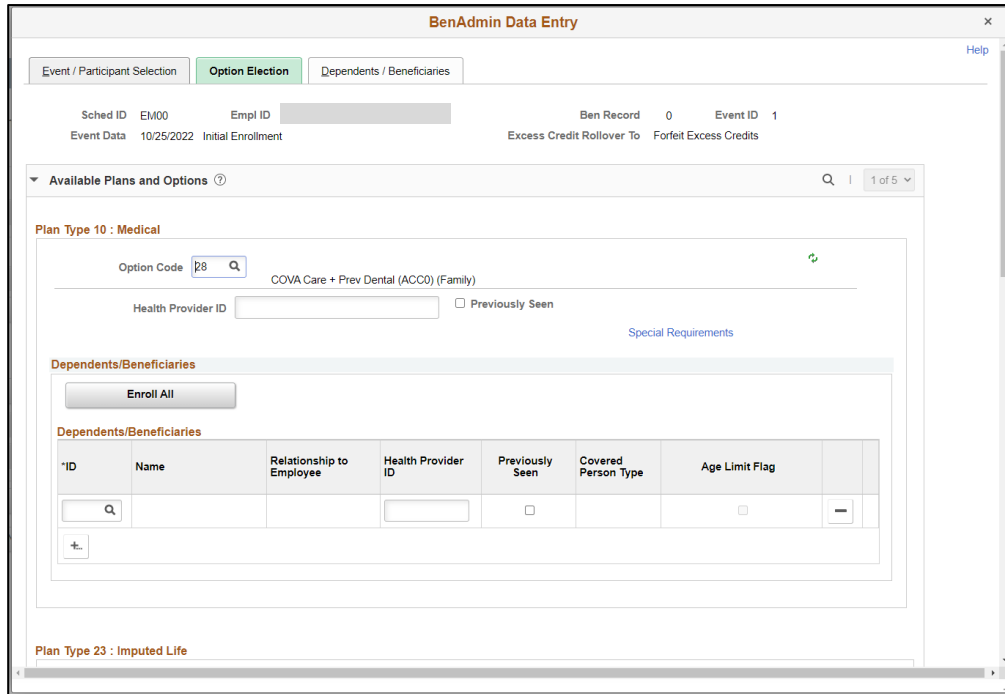| Step	Action
	The page refreshes with a new row. The **Dependent/Beneficiary ID** field increments by "1" ("02" in this example as this is the second dependent being added). Repeat Steps 17 – 32 to complete the data entry for the next dependent and then repeat as needed until all dependents have been added.
ℹ	All dependents that have been added display in the **Dependent/Beneficiaries Currently on Record** section.
35.	Click the **Option Election** tab at the top of the page.

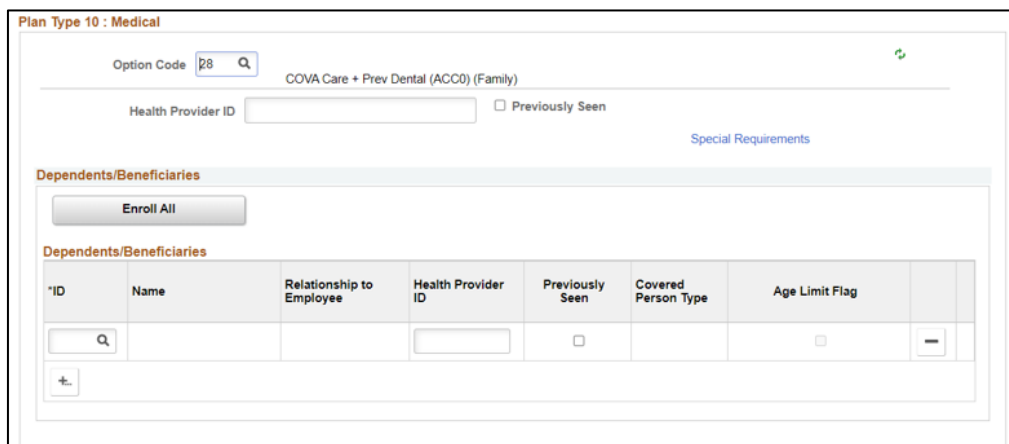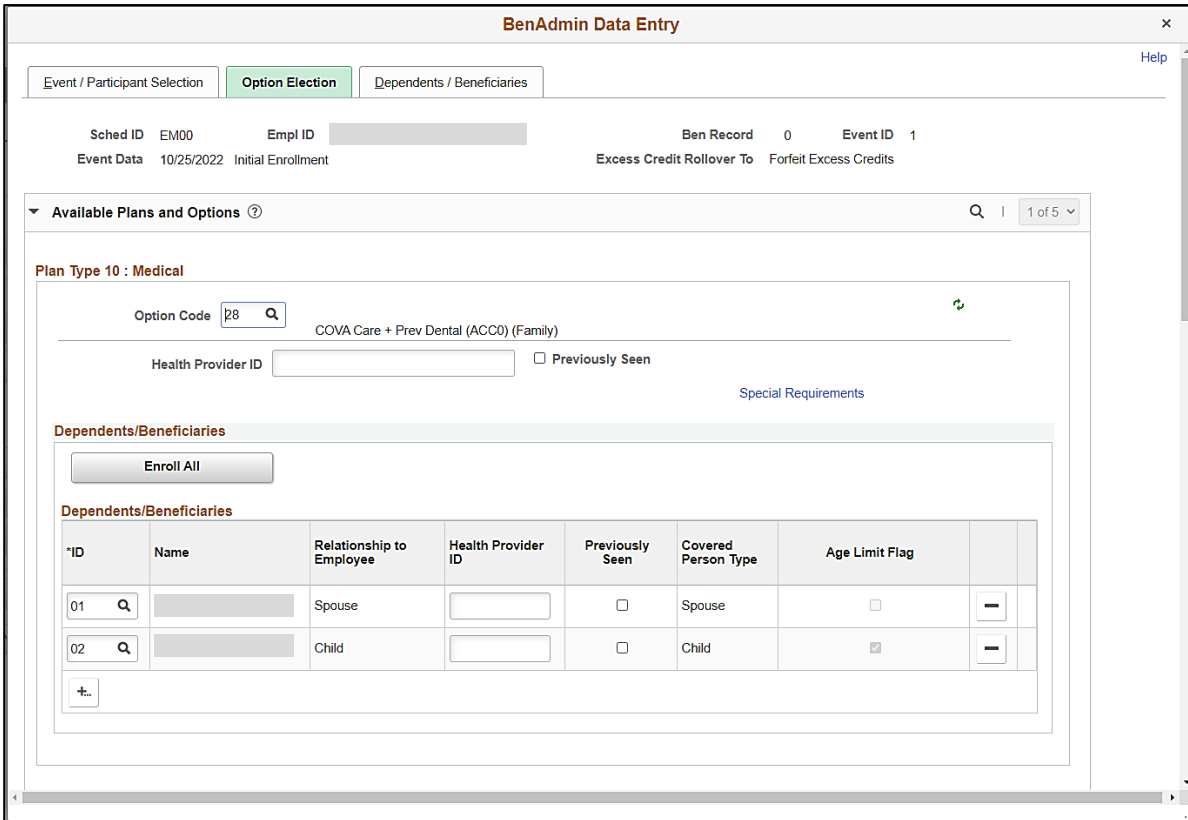| Step	Action
	The **Option Election** tab redisplays.
36.	Next, enroll the dependents in the previously selected Medical Plan by either: • Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example) Or • Adding the applicable dependents individually using the **ID Look Up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (**+...**)

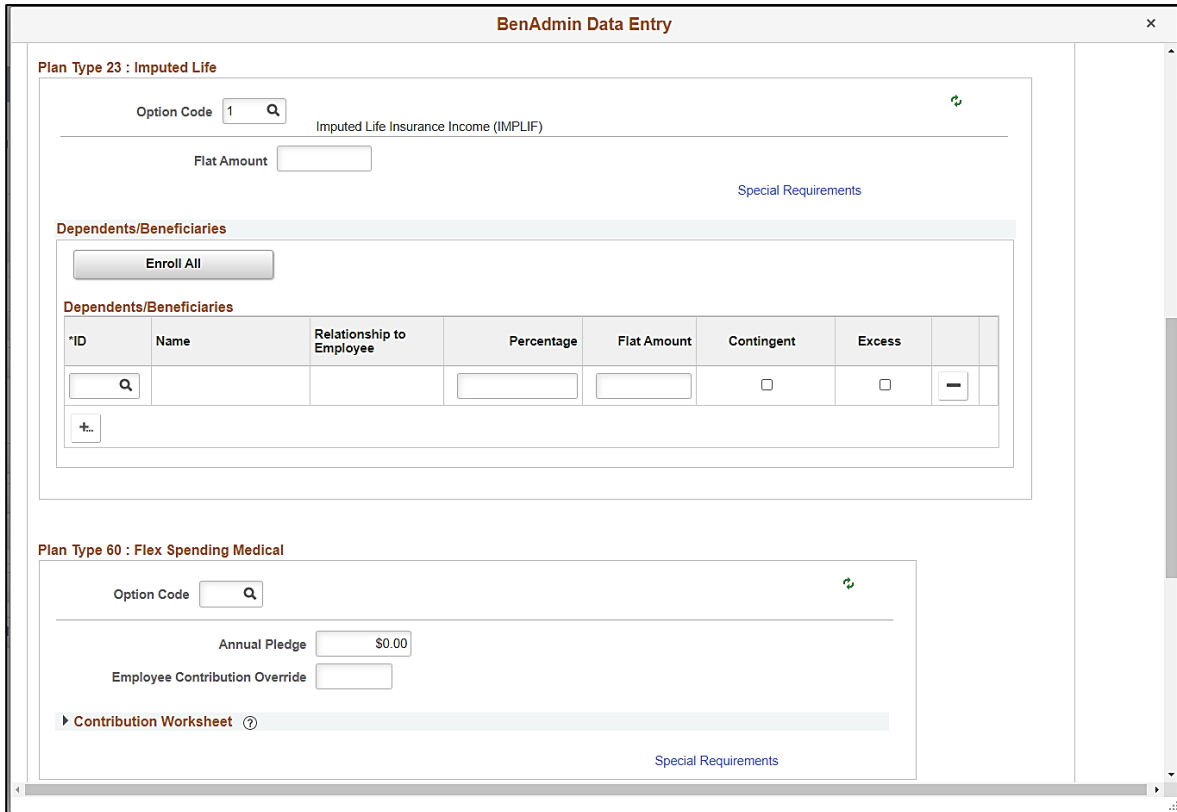| Step	Action
	The page refreshes.
37.	The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.
38.	Click the vertical scrollbar to scroll down on the **Option Election** tab.

Step	Action

The **Plan Type 23: Imputed Life** section displays.

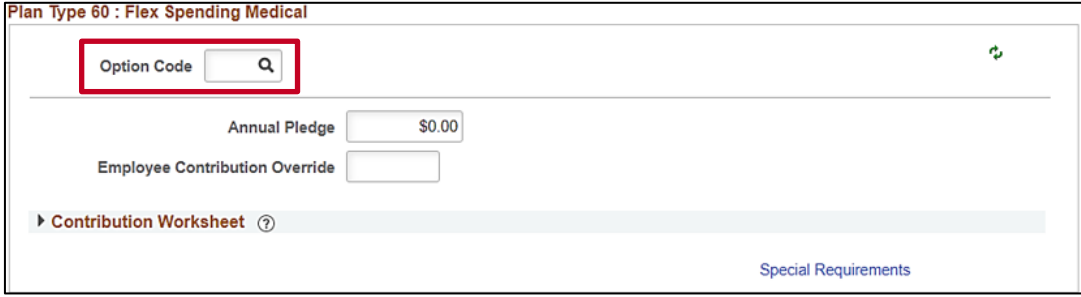**BenAdmin Data Entry** ×

Plan Type 23 : Imputed Life

Option Code [1 🔍]

Imputed Life Insurance Income (IMPLIF)

Flat Amount [ ]

Special Requirements

Dependents/Beneficiaries

[Enroll All]

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Percentage	Flat Amount	Contingent	Excess	
🔍			[ ]	[ ]	☐	☐	−

[+...]

Plan Type 60 : Flex Spending Medical

Option Code [🔍]

Annual Pledge [$0.00]

Employee Contribution Override [ ]

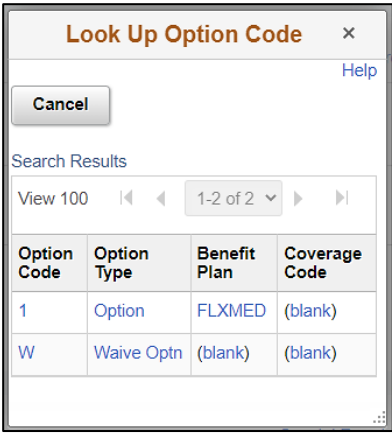▶ Contribution Worksheet ⑦

Special Requirements

ℹ️ Skip the **Imputed Life** section. The eligible employee was automatically enrolled in the Imputed Life Insurance Income Plan when the HR2 Benefit Event was processed. The remaining sections available for the employee on the **Option Election** tab are based on the employee's benefits eligibility.

Cardinal has embedded configurations based on the Commonwealth's Program rules. The specific elections made are based on the employee's Benefit Enrollment form. This Job Aid provides the steps used to elect a Flex Spending Medical Plan, waive the Flex Spending Dependent Care plan, and elect the Flex Spending Admin Fee. If the employee is not electing any additional plans, skip to Step 46.

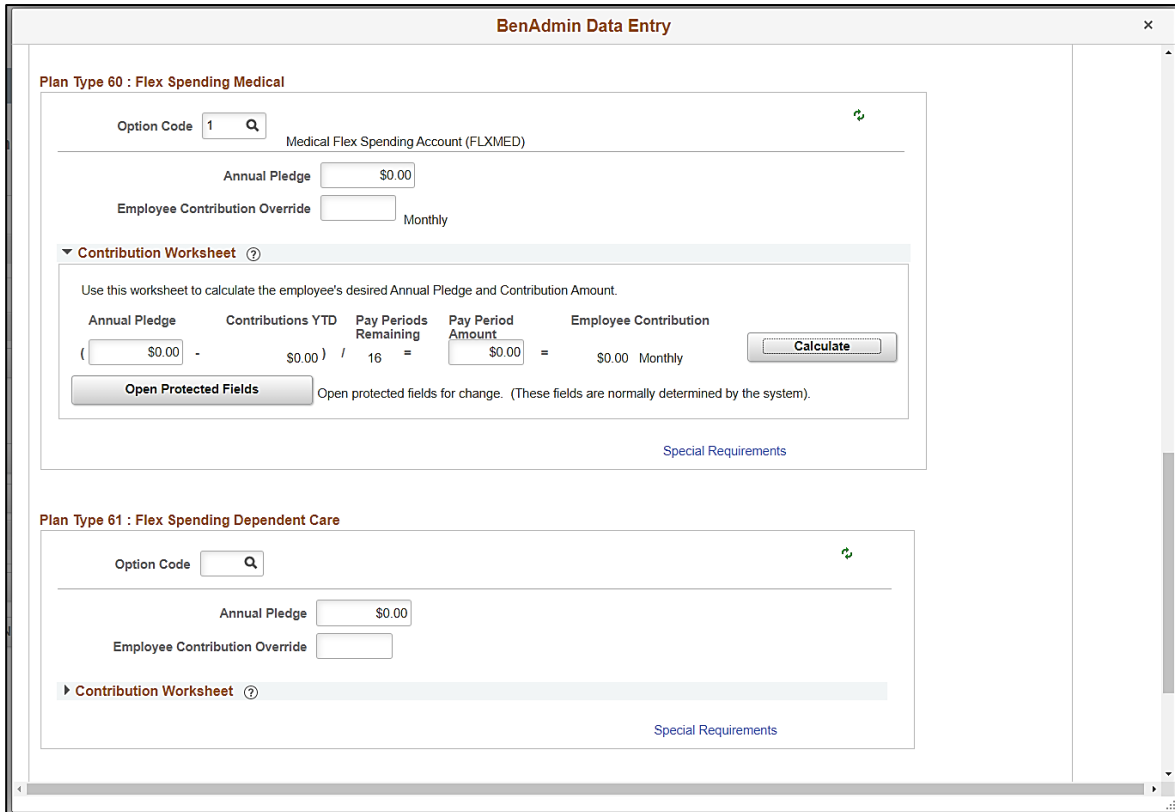| Step	Action
39.	Next, complete the **Plan Type 60: Flex Spending Medical** section. Click the **Flex Spending Medical Option Code Look Up** icon. Plan Type 60 : Flex Spending Medical Option Code [🔍] Annual Pledge $0.00 Employee Contribution Override [ ] ▶ Contribution Worksheet ? Special Requirements
ℹ️	If Steps 39 - 41 are not completed, the system will automatically waive the Flex Spending Medical plan for the employee as this is not a required plan.
	The **Look Up Option Code** page displays in a pop-up window. **Look Up Option Code** ✕ Help [Cancel] Search Results View 100 |◀ ◀ 1-2 of 2 ▾ ▶ ▶| 	Option Code	Option Type	Benefit Plan	Coverage Code	 |---|---|---|---| | 1 | Option | FLXMED | (blank) | | W | Waive Optn | (blank) | (blank) |
40.	Click the **Option Code 1** link. 	Option Code	Option Type	Benefit Plan	Coverage Code	 |---|---|---|---| | 1 | Option | FLXMED | (blank) |

Step	Action
	The **Option Election** tab redisplays

41.	Enter the employee's annual pledge amount in the **Annual Pledge** field.

ℹ	If the employee provided a Pay Period amount vice an annual pledge amount, use the **Contribution Worksheet** section to calculate the annual pledge amount and then enter this calculated amount in the **Annual Pledge** field. To perform this, enter the Pay Period amount provided by the employee in the **Pay Period Amount** field and then click the **Calculate** button. The calculated amount will display in the **Annual Pledge** field (within the **Contribution Worksheet** section). Enter this amount in the **Annual Pledge** field.

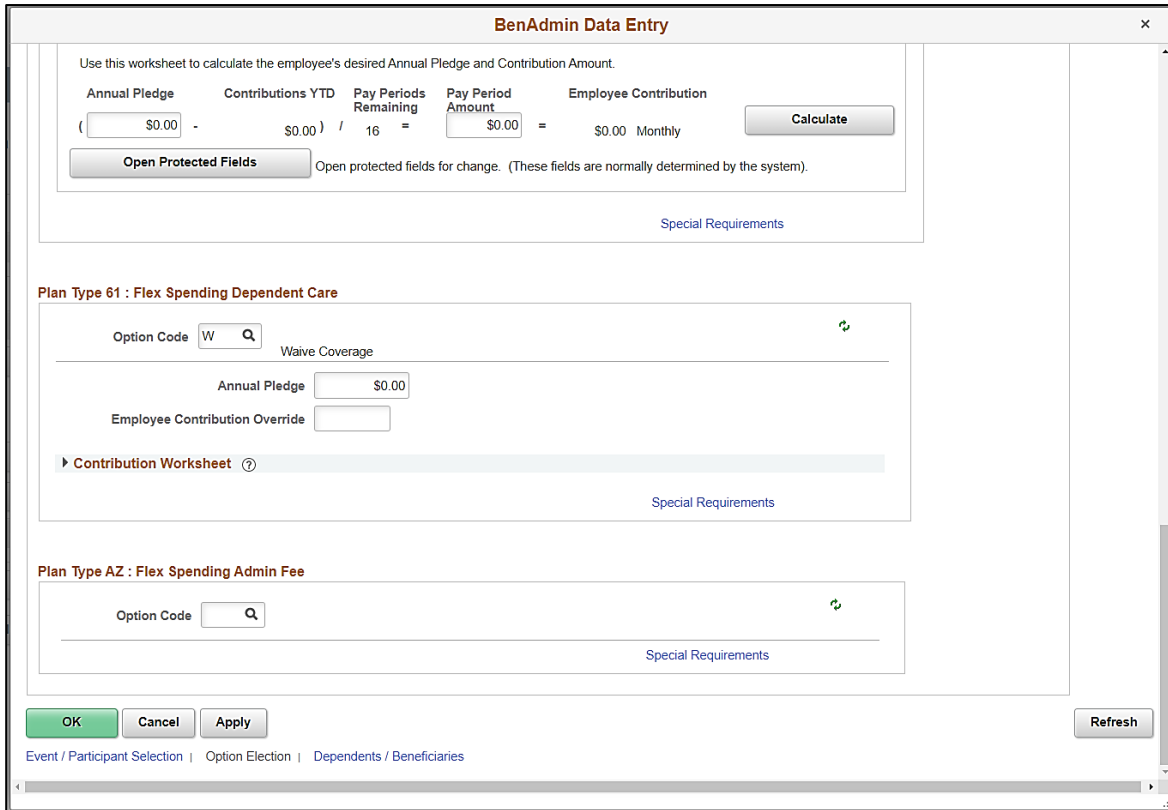| Step	Action
42.	Next, complete the **Plan Type 61: Flex Spending Dependent Care** section. Click the **Flex Spending Dependent Care Option Code Look Up** icon. **Plan Type 61 : Flex Spending Dependent Care** Option Code [🔍] Annual Pledge $0.00 Employee Contribution Override [ ] ▶ Contribution Worksheet ⑦ Special Requirements
ℹ	If Steps 42 - 43 are not completed, the system will automatically waive the Flex Spending Dependent Care plan for the employee as this is not a required plan.
	The **Look Up Option Code** page displays in a pop-up window. **Look Up Option Code** ✕ Help [Cancel] Search Results View 100 ◁ 1-2 of 2 ▾ ▷ ▷▏ 	Option Code	Option Type	Benefit Plan	Coverage Code	 	1	Option	FLXDCR	(blank)	 	W	Waive Optn	(blank)	(blank)	
43.	Click the **Option Code W (Waive)** link. 	Option Code	Option Type	Benefit Plan	Coverage Code	 |---|---|---|---| 	1	Option	FLXDCR	(blank)	 	W	Waive Optn	(blank)	(blank)	

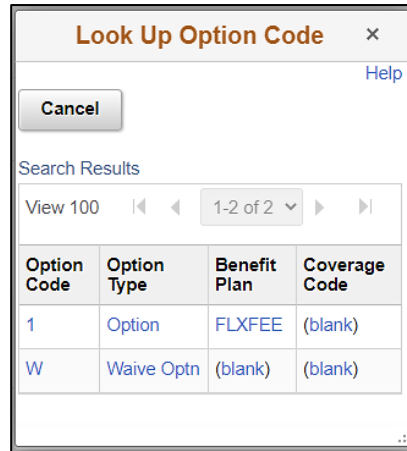| Step	Action
	The **Option Election** tab redisplays. **BenAdmin Data Entry** Use this worksheet to calculate the employee's desired Annual Pledge and Contribution Amount. Annual Pledge — Contributions YTD — Pay Periods Remaining — Pay Period Amount — Employee Contribution ($0.00 — $0.00) / 16 = $0.00 = $0.00 Monthly — **Calculate** **Open Protected Fields** — Open protected fields for change. (These fields are normally determined by the system.) Special Requirements **Plan Type 61 : Flex Spending Dependent Care** Option Code [W] Waive Coverage Annual Pledge [$0.00] Employee Contribution Override [ ] ▶ Contribution Worksheet ⑦ Special Requirements **Plan Type AZ : Flex Spending Admin Fee** Option Code [ ] Special Requirements **OK** **Cancel** **Apply** **Refresh** Event / Participant Selection	Option Election	Dependents / Beneficiaries
ⓘ	If either a Flex Spending Medical plan or a Flex Spending Dependent Care plan was elected for the employee, the Flex Spending Admin Fee must be elected. Cardinal will provide an error if this is not completed. If neither of these plans was elected for the employee, the system will automatically waive the Flex Spending Admin Fee.
44.	Click the **Flex Spending Admin Fee Option Code Look Up** icon. **Plan Type AZ : Flex Spending Admin Fee** Option Code [🔍] Special Requirements

Step	Action
	The **Look Up Option Code** page displays in a pop-up window.
45.	Click the **Option Code 1** link.

Step	Action
	The **Option Election** tab redisplays.
46.	Once all elections have been made, click the **OK** button.
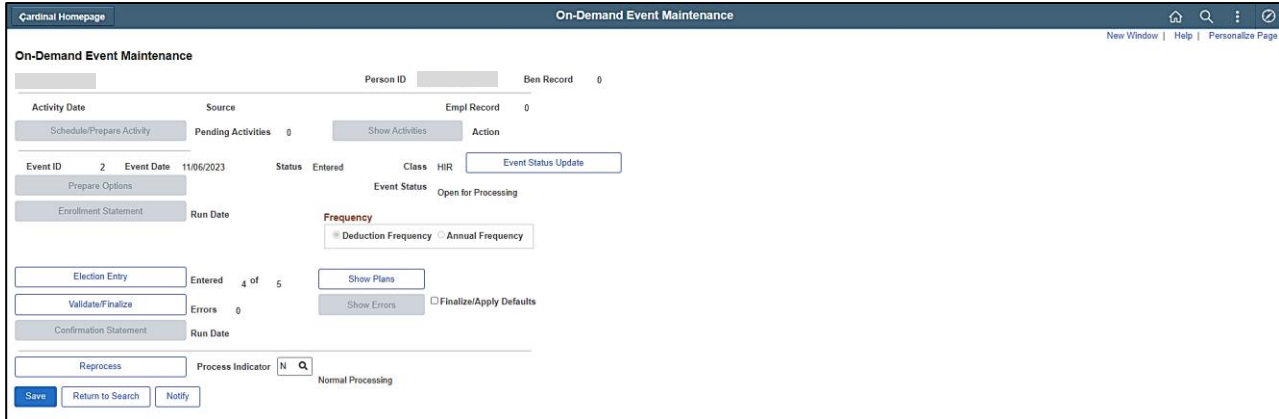
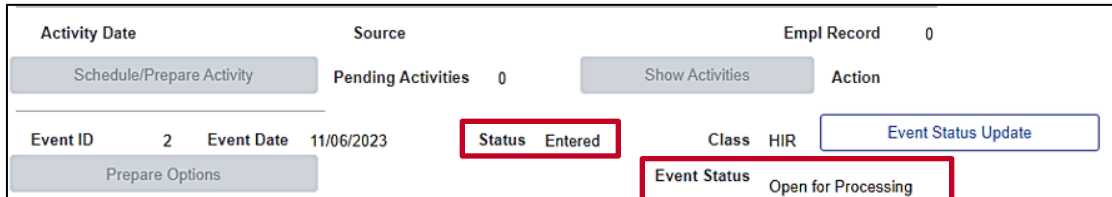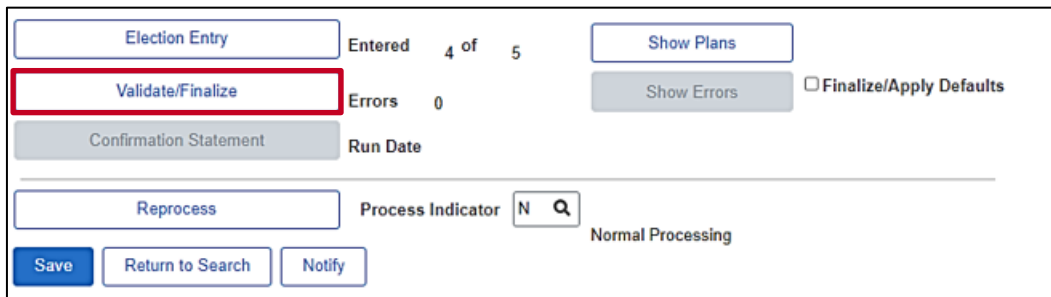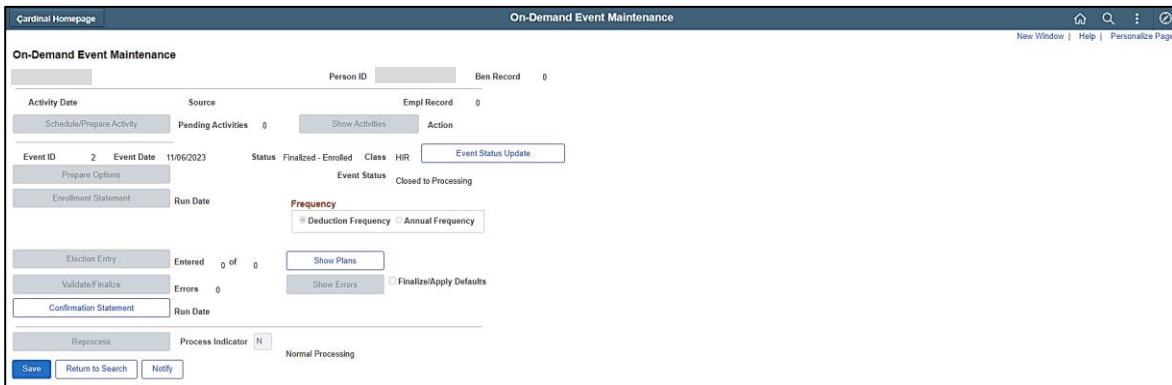| Step	Action
	The **On-Demand Event Maintenance** page redisplays. ![On-Demand Event Maintenance page screenshot] The screenshot shows the On-Demand Event Maintenance page with Person ID, Ben Record 0, Activity Date, Source, Empl Record 0, Schedule/Prepare Activity, Pending Activities 0, Show Activities, Action, Event ID 2, Event Date 11/06/2023, 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 4 of 5, 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.
ℹ	The **Status** field will now display as "Entered". The **Event Status** field will still display as "Open for Processing". ![Screenshot showing Status Entered and Event Status Open for Processing] Activity Date, Source, Empl Record 0, Schedule/Prepare Activity, Pending Activities 0, Show Activities, Action, Event ID 2, Event Date 11/06/2023, **Status Entered**, Class HIR, Event Status Update, Prepare Options, **Event Status Open for Processing**.
47.	Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables. ![Screenshot showing Validate/Finalize button highlighted] Election Entry, Entered 4 of 5, 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
48.	A **Confirmation** message displays in a pop-up window once the process completes. Click the **OK** button to close the message. Process completed successfully. (3000,530) OK
	The **On-Demand Event Maintenance** page redisplays.
	The **Status** field will now display as "Finalized-Enrolled". The **Event Status** field will now display as "Closed to Processing".
49.	Click the **Save** button.