

**Employee set up for Medicare Overview**

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

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**Scenario 1: Employee turns 65 (with single coverage)**

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

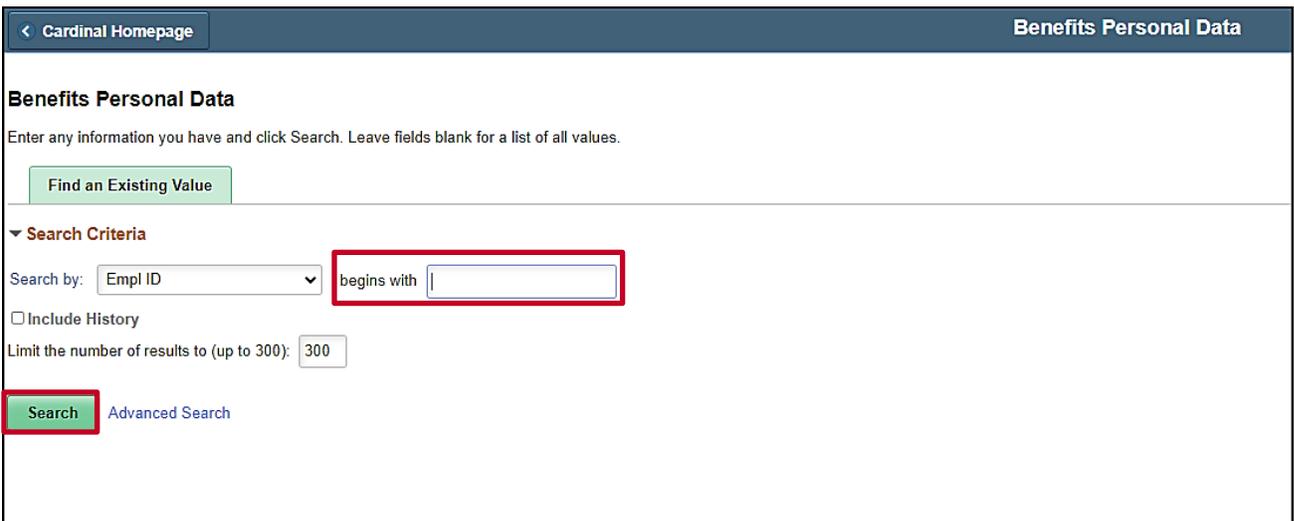
**The Benefits Personal Data Page**

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

1. Access the **Benefits Personal Data** page using the following path:

**Navigator > Benefits > Employee/Dependent Information > Benefits Personal Data**

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



< Cardinal Homepage Benefits Personal Data

**Benefits Personal Data**

Enter any information you have and click Search. Leave fields blank for a list of all values.

▼ Search Criteria

Search by:  begins with

Include History

Limit the number of results to (up to 300):

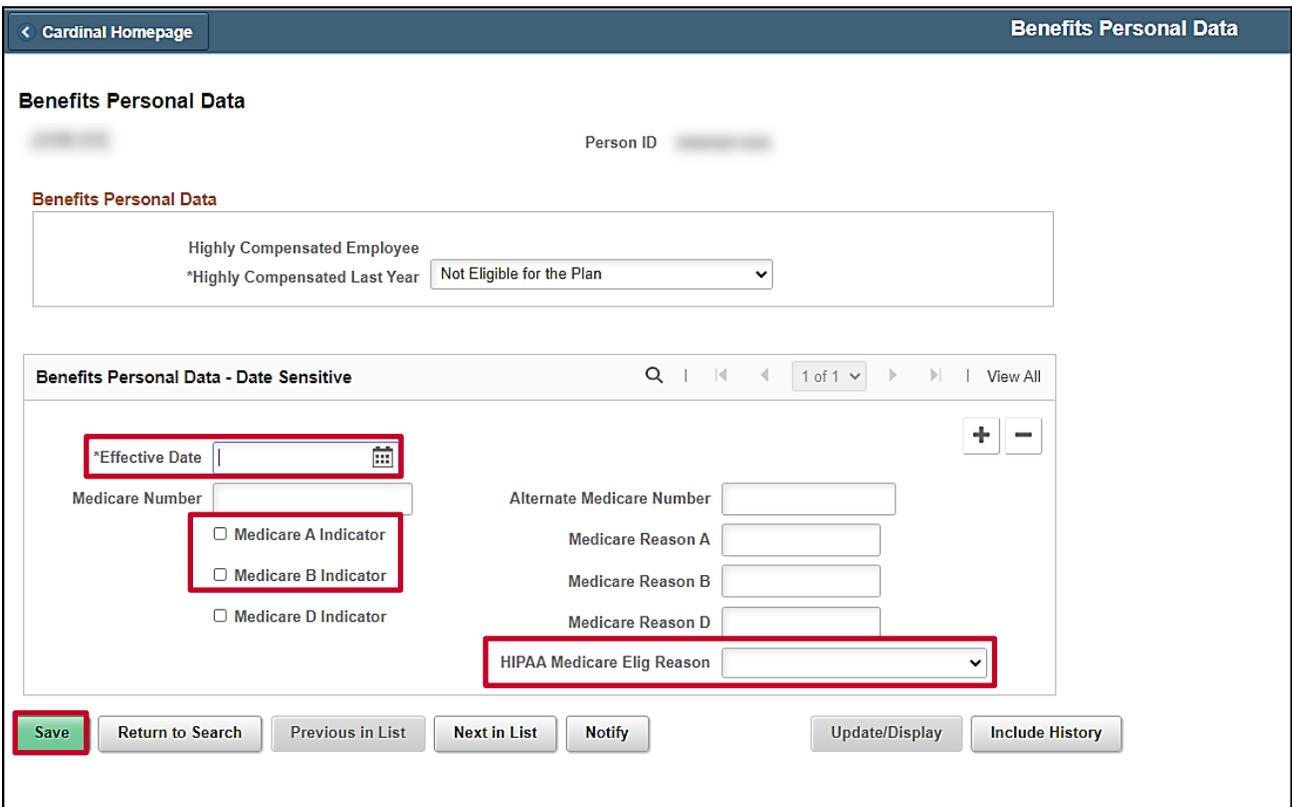
[Advanced Search](#)

2. Enter the Employee ID in the **Empl ID** field.

**Note:** You can also search by entering the beginning of the Name, or other search criteria using the corresponding drop-down options. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Cardinal security restricts the user to seeing only their agency employees.

3. Click the **Search** button.

The **Benefits Personal Data** page refreshes with the employee's information.



The screenshot shows the 'Benefits Personal Data' page. At the top, there is a navigation bar with 'Cardinal Homepage' and 'Benefits Personal Data'. Below this, the page title 'Benefits Personal Data' is displayed. A 'Person ID' field is visible. The main form area contains several sections:

- Benefits Personal Data:** A section with a 'Highly Compensated Employee' label and a dropdown menu for '\*Highly Compensated Last Year' set to 'Not Eligible for the Plan'.
- Benefits Personal Data - Date Sensitive:** A section with a search bar and '1 of 1' indicator. It contains several input fields:
  - \*Effective Date (with a calendar icon)
  - Medicare Number
  - Alternate Medicare Number
  - Medicare Reason A, B, and D (text input fields)
  - HIPAA Medicare Elig Reason (dropdown menu)
  - Three checkboxes: Medicare A Indicator, Medicare B Indicator, and Medicare D Indicator.
- Buttons:** A row of buttons at the bottom: Save (highlighted with a red box), Return to Search, Previous in List, Next in List, Notify, Update/Display, and Include History.

4. Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field on the **Benefits Personal Data** page.

5. Check the boxes next to **Medicare A** and **Medicare B**.

**Note:** For End Stage Renal Failure, the Medicare A, B, and/or C check boxes will not be checked. OHB is establishing the record for End Stage Renal Failure (ESRD).

6. Select the corresponding **HIPAA Medicare Elig Reason**:

- a. Age
- b. Disability

**Note:** The Eligibility Reason of End Stage Renal is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary.

**Note:** The Medicare number will be populated by the Agency BA when received.

7. Click the **Save** button.

**Note:** Now navigate to the **ACA Employee Eligibility** page to complete the ACA status for the Medicare enrolled participants (follow steps below).

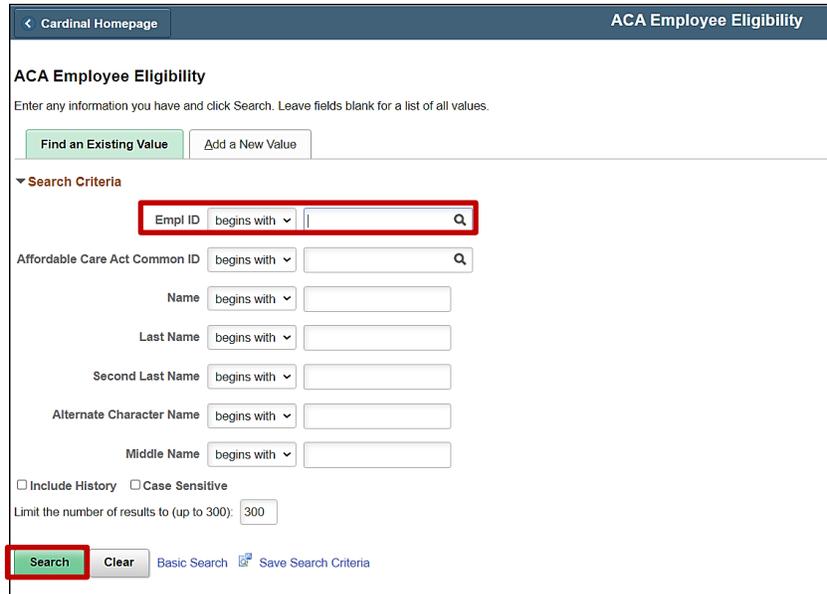
## The ACA Employee Eligibility Page

Before enrolling an employee in Medicare Benefits, the Agency BA must update the ACA Medicare Eligibility information for the employee.

1. Access the **ACA Employee Eligibility** page using the following path:

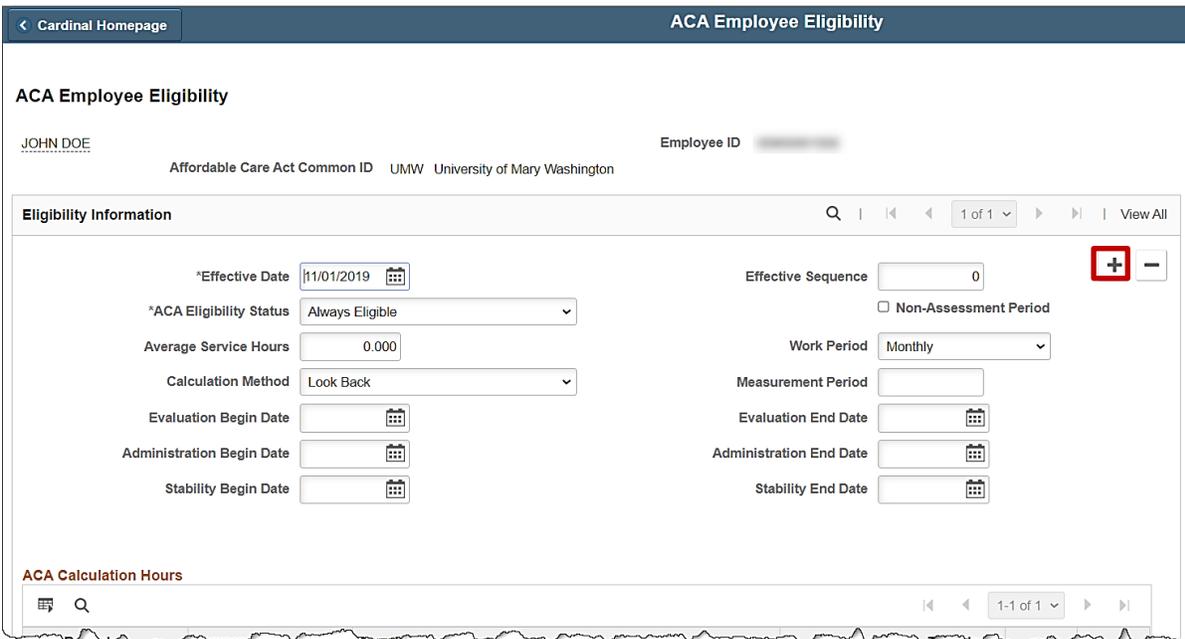
**Navigator > Benefits > Employee/Dependent Information > ACA Employee Eligibility**

The **ACA Employee Eligibility Search** page displays.



2. Enter the Employee ID in the **Empl ID** field.
3. Click on the **Search** button.

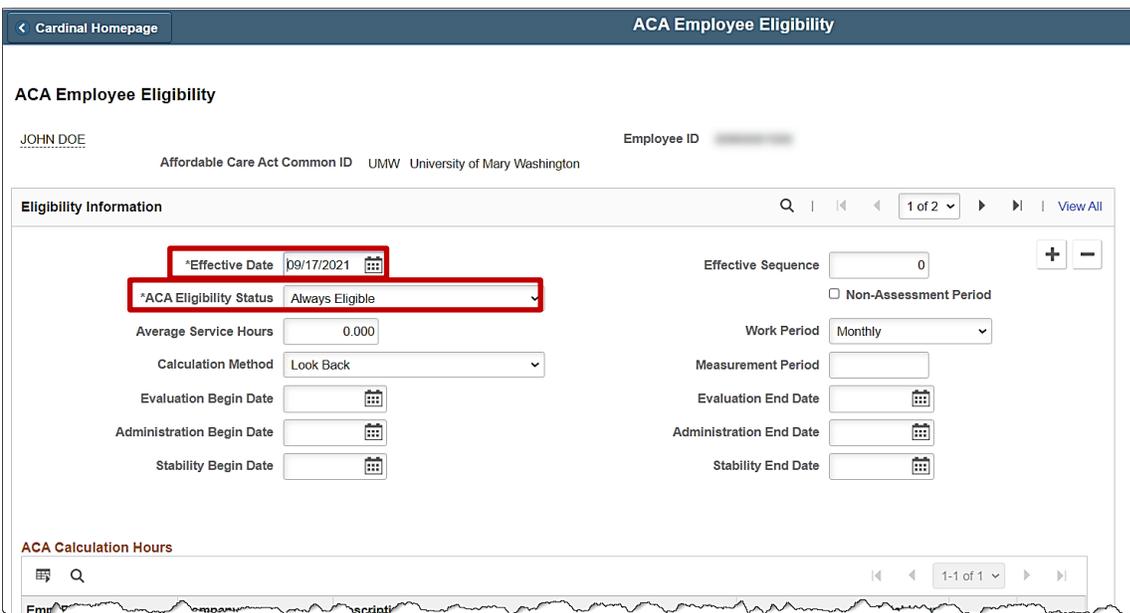
The **ACA Employee Eligibility** page displays with the employee's information.



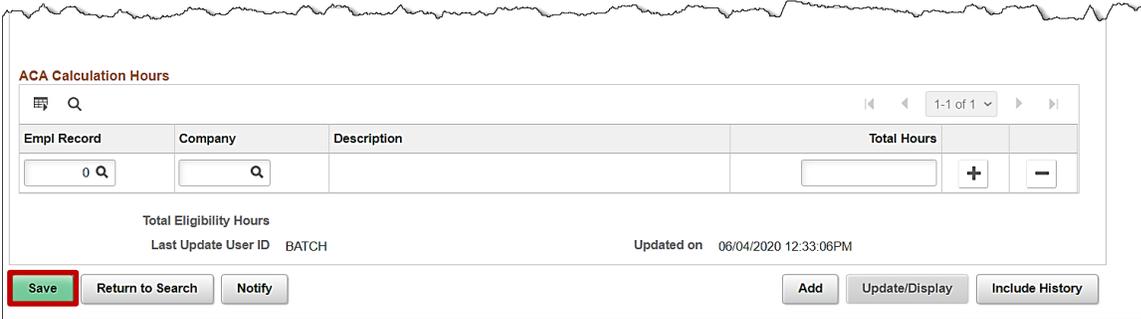
The screenshot shows the "ACA Employee Eligibility" page for employee JOHN DOE. The page displays a table with one row of eligibility information. The table has columns for various fields: \*Effective Date (11/01/2019), \*ACA Eligibility Status (Always Eligible), Average Service Hours (0.000), Calculation Method (Look Back), Evaluation Begin Date, Administration Begin Date, Stability Begin Date, Effective Sequence (0), Non-Assessment Period (unchecked), Work Period (Monthly), Measurement Period, Evaluation End Date, Administration End Date, and Stability End Date. A red box highlights the "+" button next to the Effective Sequence field, indicating where to click to add a new row. The table shows "1 of 1" rows.

4. Click on the "+" button to add a new row.

The **ACA Employee Eligibility** page refreshes with a new row.



The screenshot shows the "ACA Employee Eligibility" page after adding a new row. The table now displays two rows of eligibility information. The first row is highlighted with a red box, showing \*Effective Date (09/17/2021) and \*ACA Eligibility Status (Always Eligible). The second row is identical to the first row. The table shows "1 of 2" rows. The "+" button is still visible next to the Effective Sequence field.



ACA Calculation Hours

1-1 of 1

Empl Record	Company	Description	Total Hours
0			

Total Eligibility Hours

Last Update User ID BATCH Updated on 06/04/2020 12:33:06PM

**Save** Return to Search Notify Add Update/Display Include History

5. The Effective Date will default to the current date. Change the **Effective Date** to be the top of the month in which the employee is being enrolled in Medicare.
6. Select **Excluded** from the drop-down menu next to **Eligibility Status**.
7. Click the **Save** button.

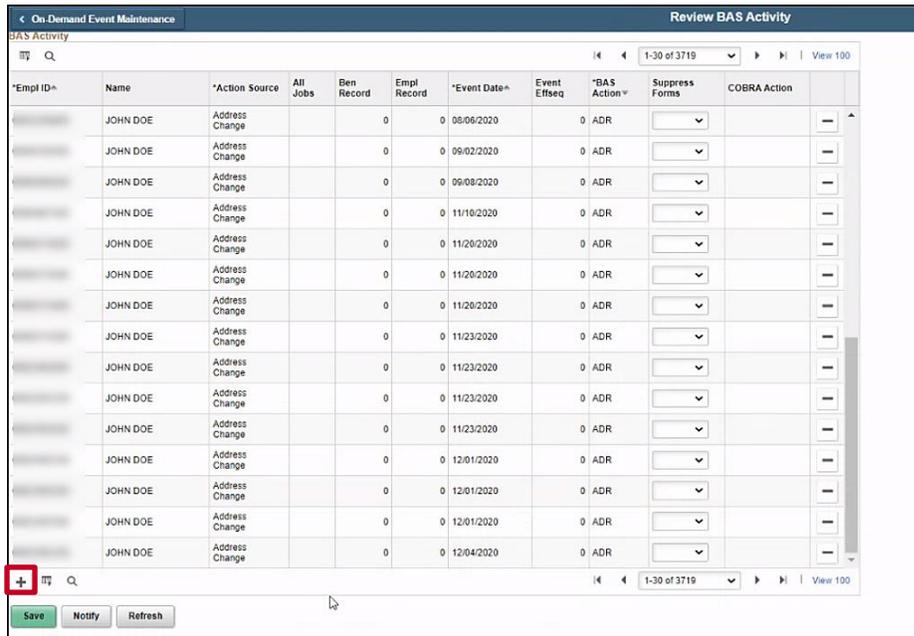
### Process the Medicare Manual Event

To enroll the employee in Medicare, the Benefit Administrator (BA) must first add a **GEM** Manual Event through the **BAS** Activity page and then process the enrollment through the **On-Demand Event Maintenance** page.

1. Access the **BAS Activity** page using the following path:

**Benefit Administrator tile > Manage Automated Enrollment > Review BAS Activity**

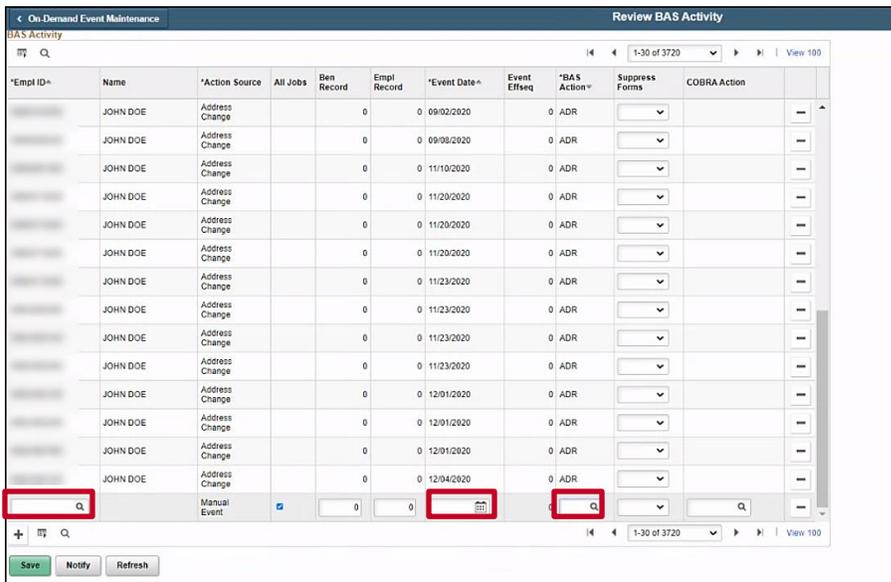
The **Review BAS Activity** page displays.



*Empl ID*	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action
	JOHN DOE	Address Change			0	08/06/2020	0	ADR		
	JOHN DOE	Address Change			0	09/02/2020	0	ADR		
	JOHN DOE	Address Change			0	09/09/2020	0	ADR		
	JOHN DOE	Address Change			0	11/10/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/04/2020	0	ADR		

2. Click the **+** sign to add row.

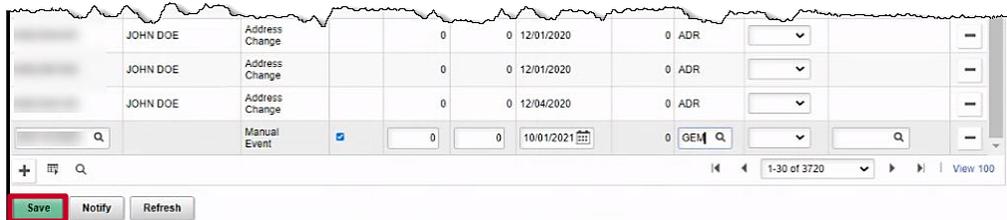
The **Review BAS Activity** page refreshes.



*Empl ID*	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action
	JOHN DOE	Address Change		0	0	09/02/2020	0	ADR		
	JOHN DOE	Address Change		0	0	09/09/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/19/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/20/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR		
	JOHN DOE	Address Change		0	0	11/23/2020	0	ADR		
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR		
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR		
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR		
	JOHN DOE	Address Change		0	0	12/04/2020	0	ADR		
		Manual Event	<input checked="" type="checkbox"/>	0	0	10/01/2021	0	GEM		

3. Enter the **Empl ID** in the first box to the left.
4. Enter the **Effective date** of the event in the date field.
5. Click on the magnifying glass in the **BAS Action** section and select the **GEM** event (Gained Eligibility for Medicare).

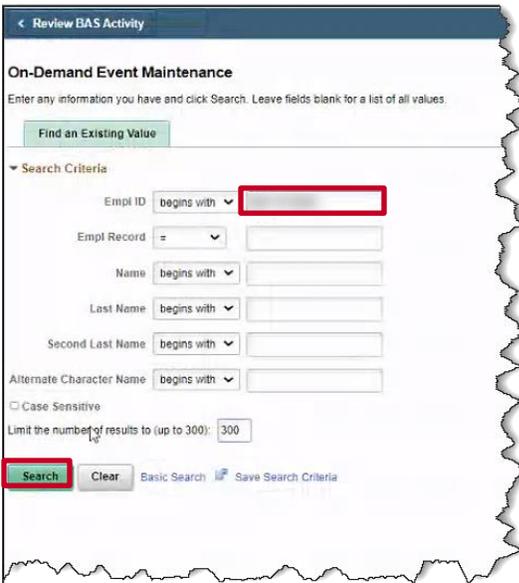
The **BAS Activity** displays with the information in the new row.



	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR		
	JOHN DOE	Address Change		0	0	12/01/2020	0	ADR		
	JOHN DOE	Address Change		0	0	12/04/2020	0	ADR		
		Manual Event	<input checked="" type="checkbox"/>	0	0	10/01/2021	0	GEM		

6. Click **Save**.
7. Navigate to the **On-Demand Event Maintenance** page.

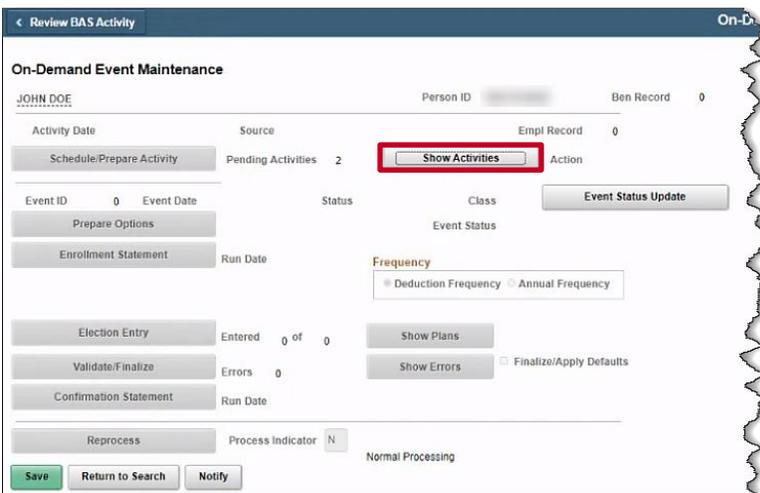
The **On-Demand Event Maintenance** page search page displays.



8. Enter the **Empl ID**.

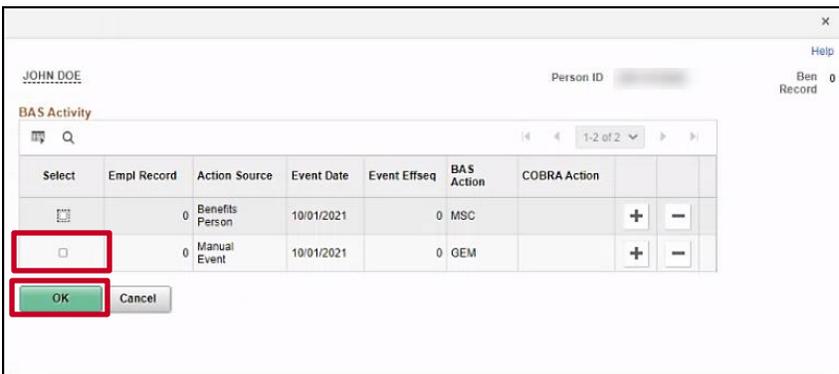
9. Click **Search**.

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



10. Click on the **Show Activities** button.

The **Show Activities** page displays.



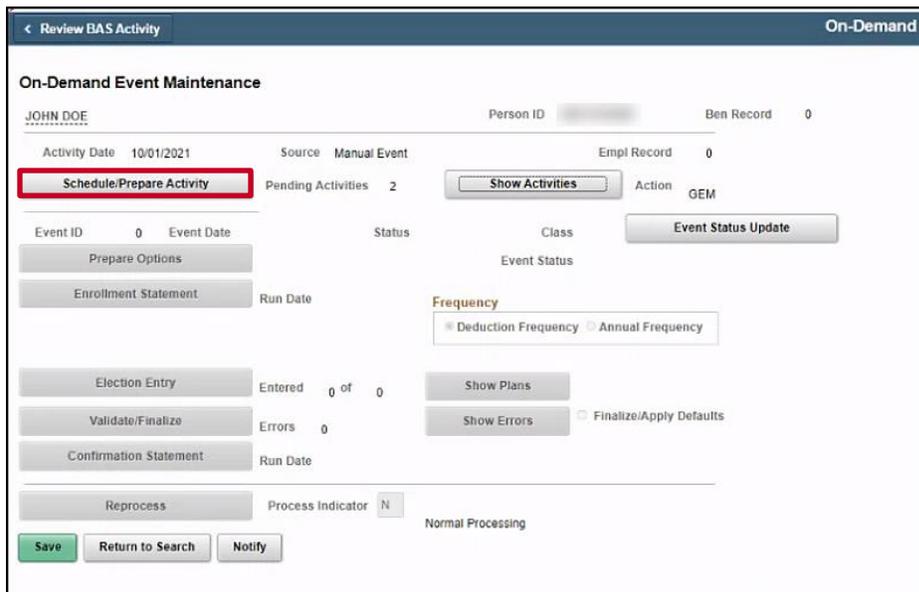
Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input type="checkbox"/>	0	Benefits Person	10/01/2021	0	MSC	+ -
<input checked="" type="checkbox"/>	0	Manual Event	10/01/2021	0	GEM	+ -

11. Select the **GEM** manual event from the **BAS Activity** table.

**Note:** The MSC listed in the BAS Activity table was created as a result of the Medicare information update completed on the **Benefit Personal Data** page.

12. Click **OK**.

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



Activity Date: 10/01/2021 | Source: Manual Event | Empl Record: 0

**Schedule/Prepare Activity** | Pending Activities: 2 | **Show Activities** | Action: GEM

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

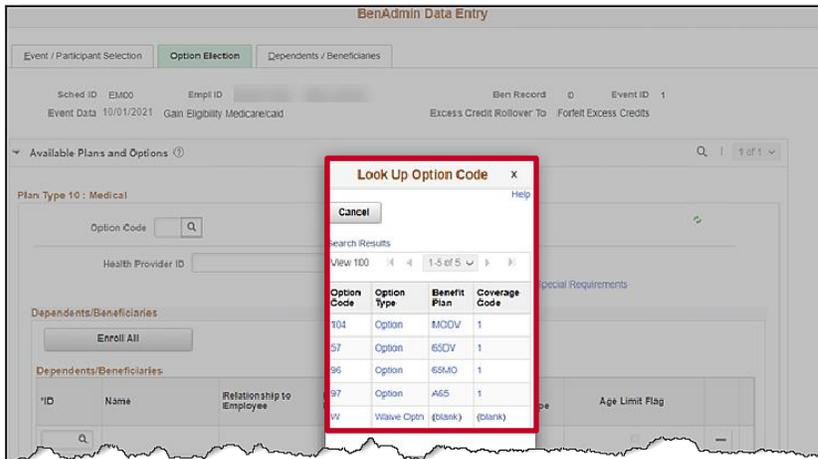
Confirmation Statement | Run Date: | Reprocess | Process Indicator: N | Normal Processing

**Save** | Return to Search | Notify

13. Click the **Schedule/Prepare Activity** button.

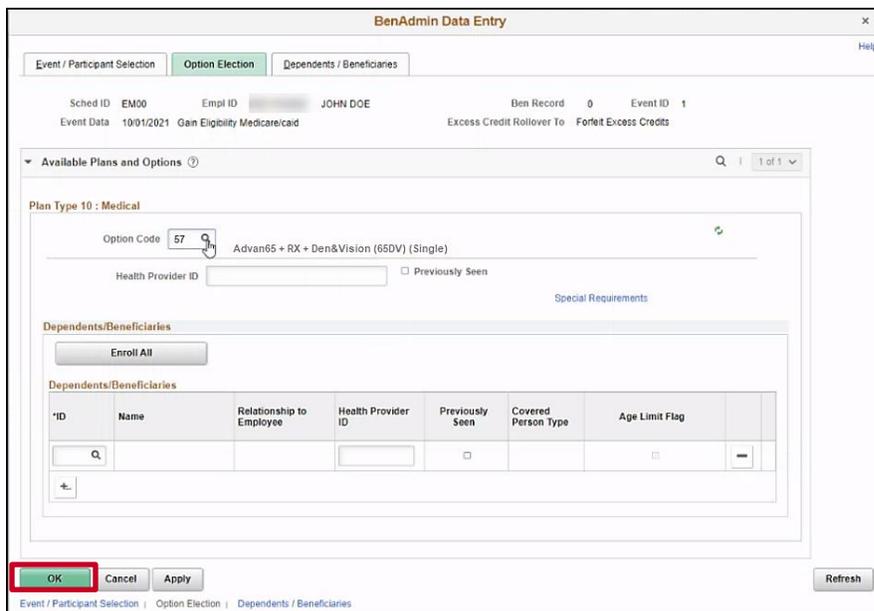


The **Look Up Option Code** pop-up appears.



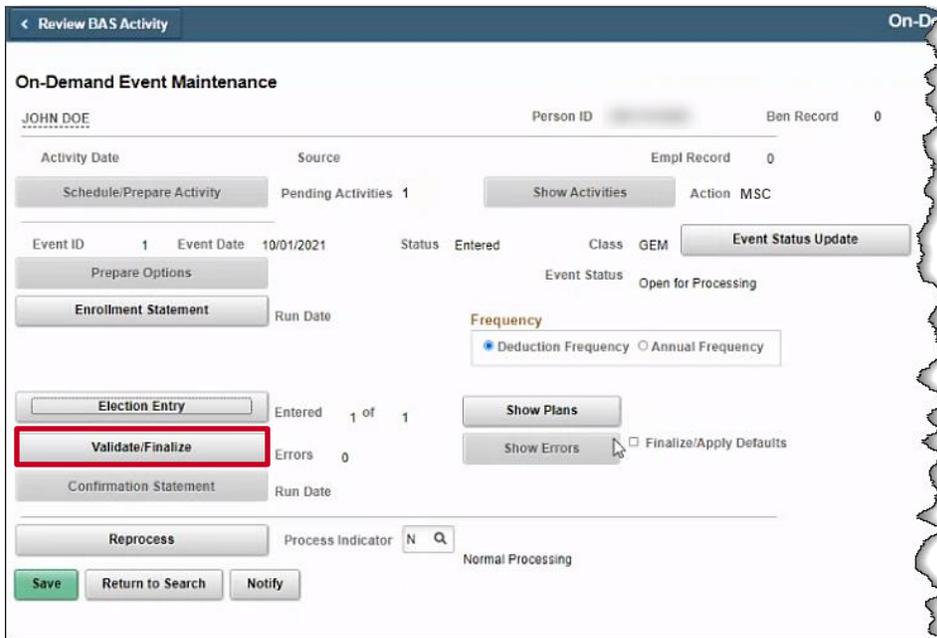
16. Select a **Medical plan**.

The **BenAdmin Data Entry** page returns.



17. Click **OK**.

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



**Review BAS Activity** On-Demand

**On-Demand Event Maintenance**

JOHN DOE Person ID [REDACTED] Ben Record 0

Activity Date Empl Record 0

**Schedule/Prepare Activity** Pending Activities 1 **Show Activities** Action MSC

Event ID 1 Event Date 10/01/2021 Status Entered Class GEM **Event Status Update**

**Prepare Options** Event Status Open for Processing

**Enrollment Statement** Run Date

**Election Entry** Entered 1 of 1 **Show Plans**

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

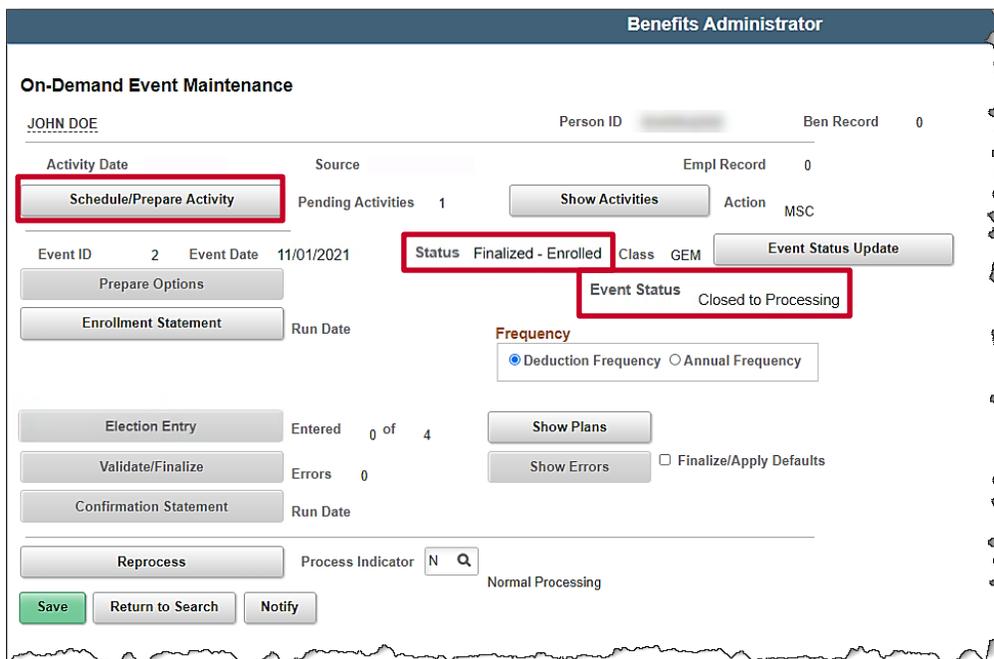
**Confirmation Statement** Run Date

**Reprocess** Process Indicator N Normal Processing

**Save** **Return to Search** **Notify**

18. Click **Validate/Finalize**.

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



**Benefits Administrator**

**On-Demand Event Maintenance**

JOHN DOE Person ID [REDACTED] Ben Record 0

Activity Date Empl Record 0

**Schedule/Prepare Activity** Pending Activities 1 **Show Activities** Action MSC

Event ID 2 Event Date 11/01/2021 Status Finalized - Enrolled Class GEM **Event Status Update**

**Prepare Options** Event Status Closed to Processing

**Enrollment Statement** Run Date

**Election Entry** Entered 0 of 4 **Show Plans**

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

**Confirmation Statement** Run Date

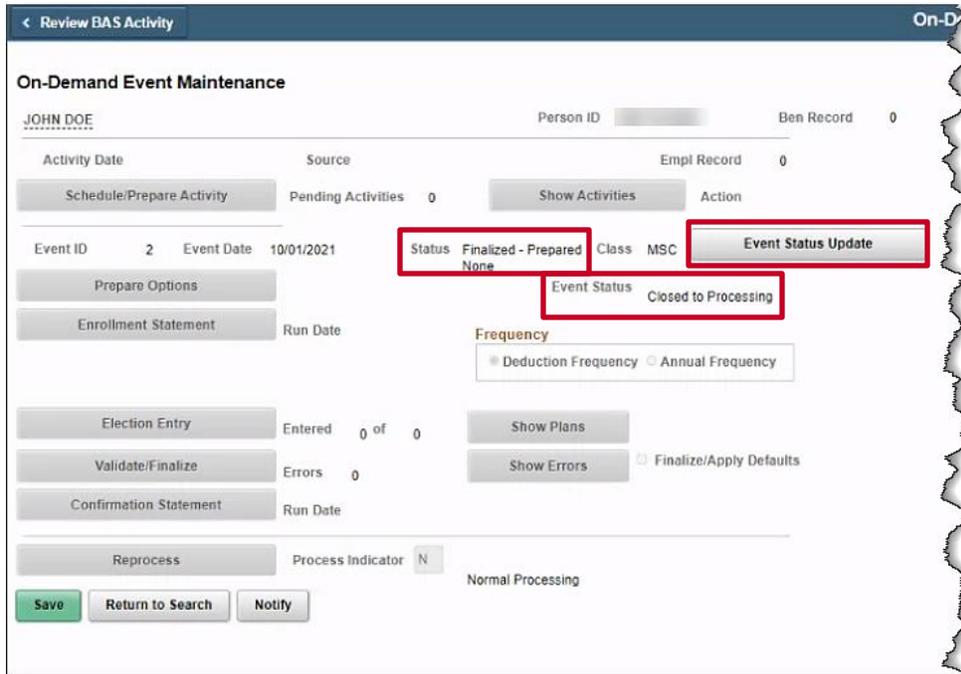
**Reprocess** Process Indicator N Normal Processing

**Save** **Return to Search** **Notify**

19. Confirm the **Status** is Finalized-Enrolled, and the **Event Status** is Closed for Processing.

20. Click **Schedule/Prepare Activity** to now process the **MSC** event.

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



**On-Demand Event Maintenance**

JOHN DOE Person ID [redacted] Ben Record 0

Activity Date Source Pending Activities 0 Show Activities Action

Event ID 2 Event Date 10/01/2021 Status Finalized - Prepared Class MSC Event Status Update

Prepare Options Event Status Closed to Processing

Enrollment Statement Run Date Frequency

Deduction Frequency  Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

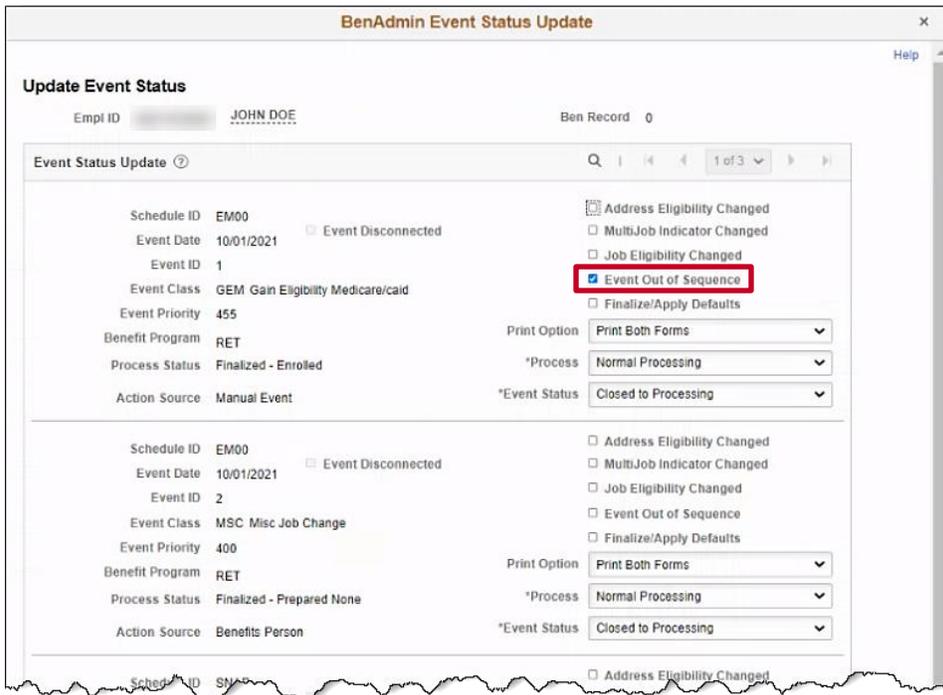
Save Return to Search Notify

21. The event processes automatically successfully.

**Note:** The **GEM** event is processed first so that in Cardinal an audit trail exists depicting the enrollment opportunity was due to Gain Eligibility for Medicare. While the **MSC** event will provide the same enrollment opportunities, the connection would be too "Miscellaneous" which does not depict the reason.

22. Click on the **Event Status Update** button to see statuses of the events.

The **Update Event Status** page displays.



**BenAdmin Event Status Update**

Update Event Status

Empl ID [REDACTED] JOHN DOE Ben Record 0

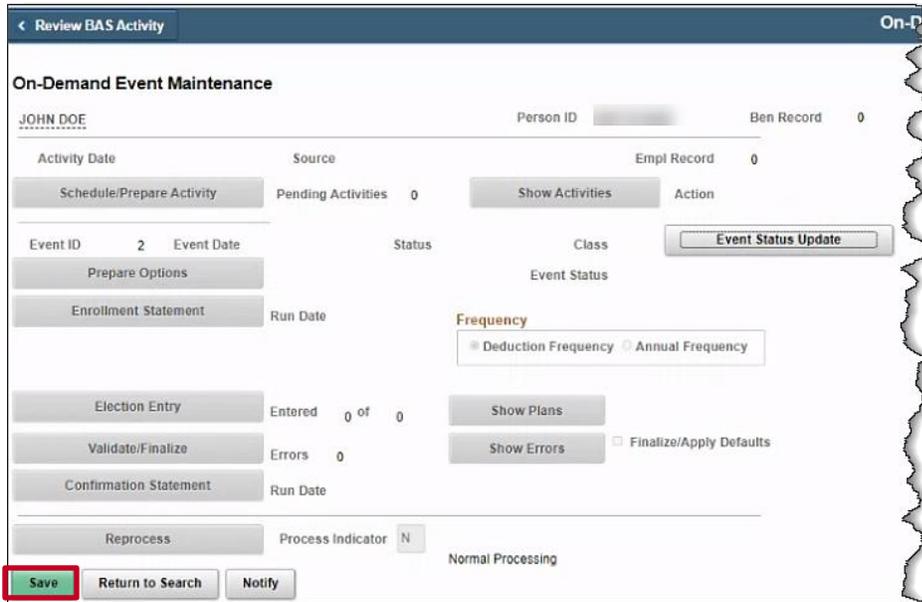
Event Status Update

Event ID	Schedule ID	Event Date	Event Class	Event Priority	Benefit Program	Process Status	Action Source	Event Out of Sequence	Print Option	*Process	*Event Status
1	EM00	10/01/2021	GEM Gain Eligibility Medicare/caid	455	RET	Finalized - Enrolled	Manual Event	<input checked="" type="checkbox"/>	Print Both Forms	Normal Processing	Closed to Processing
2	EM00	10/01/2021	MSC Misc Job Change	400	RET	Finalized - Prepared None	Benefits Person	<input type="checkbox"/>	Print Both Forms	Normal Processing	Closed to Processing

**Note:** The **GEM** event is flagged with an event out of sequence because according to the Event Class order, the **MSC** event should have been processed first. However, the BA needs to process the **GEM** event first so that it is recorded that the employee gained eligibility for Medicare.

23. Click on the box next to **Event Out of Sequence** for the **GEM** event.
24. Click **OK**.

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



**Review BAS Activity** On-D

**On-Demand Event Maintenance**

**JOHN DOE** Person ID [redacted] Ben Record 0

Activity Date Empl Record 0

Pending Activities 0  Action

Event ID 2 Event Date Class

Status Event Status

Enrollment Statement Run Date Frequency

Deduction Frequency  Annual Frequency

Entered 0 of 0

Errors 0   Finalize/Apply Defaults

Run Date

Process Indicator N Normal Processing

25. Click **Save**.

**Scenario 2: Employee turns 65 (with dependents covered)**

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

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

**The Benefits Personal Data Page**

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

1. Access the **Benefits Personal Data** page using the following path:

**Navigator > Benefits > Employee/Dependent Information > Benefits Personal Data**

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

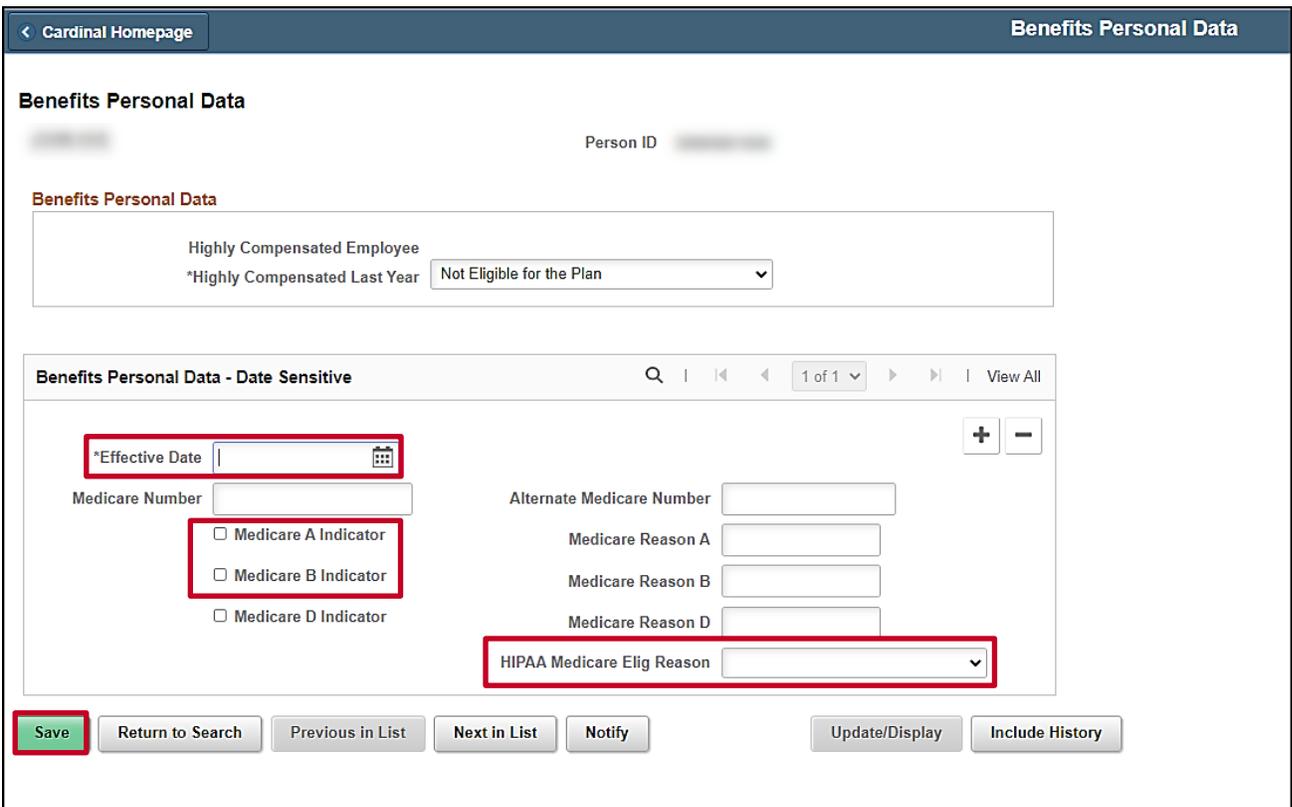


2. Enter the Employee ID in the **Empl ID** field.

**Note:** You can also search by entering the beginning of the Name, or other search criteria using the corresponding drop-down options. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Cardinal security restricts the user to seeing only their agency employees.

3. Click the **Search** button.

The **Benefits Personal Data** page refreshes with the employee's information.



4. Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field on the **Benefits Personal Data** page.

5. Check the boxes next to **Medicare A** and **Medicare B**.

**Note:** For End Stage Renal Failure, the Medicare A, B, and/or C check boxes will not be checked. OHB is establishing the record for End Stage Renal Failure (ESRD).

6. Select the corresponding **HIPAA Medicare Elig Reason**:

- a. Age
- b. Disability

**Note:** The Eligibility Reason of End Stage Renal is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary.

**Note:** The Medicare number will be populated by the Agency BA when received.

7. Click the **Save** button.

**Note:** Now navigate to the **ACA Employee Eligibility** page to complete the ACA status for the Medicare enrolled participants (follow steps below).

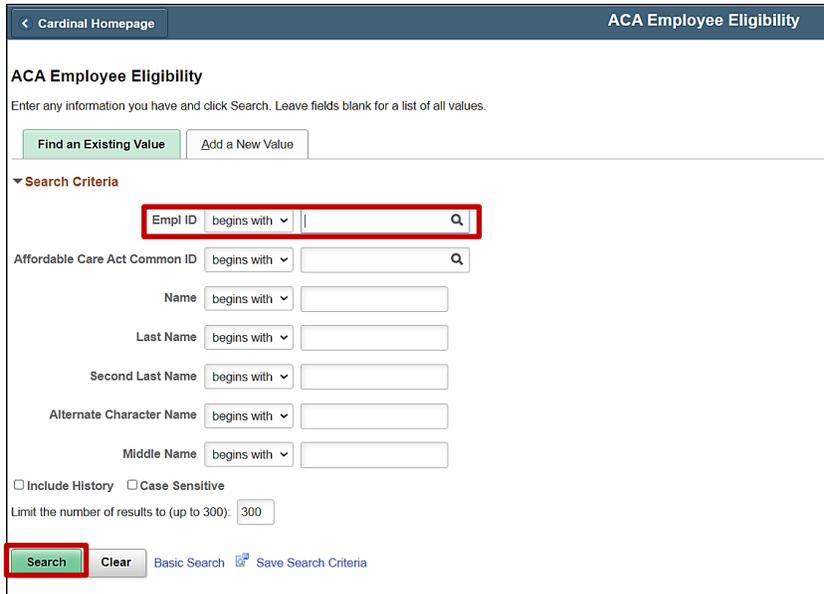
## The ACA Employee Eligibility Page

Before enrolling an employee in Medicare Benefits, the Agency BA must update the **ACA Medicare Eligibility** information for the employee.

1. Access the **ACA Employee Eligibility** page using the following path:

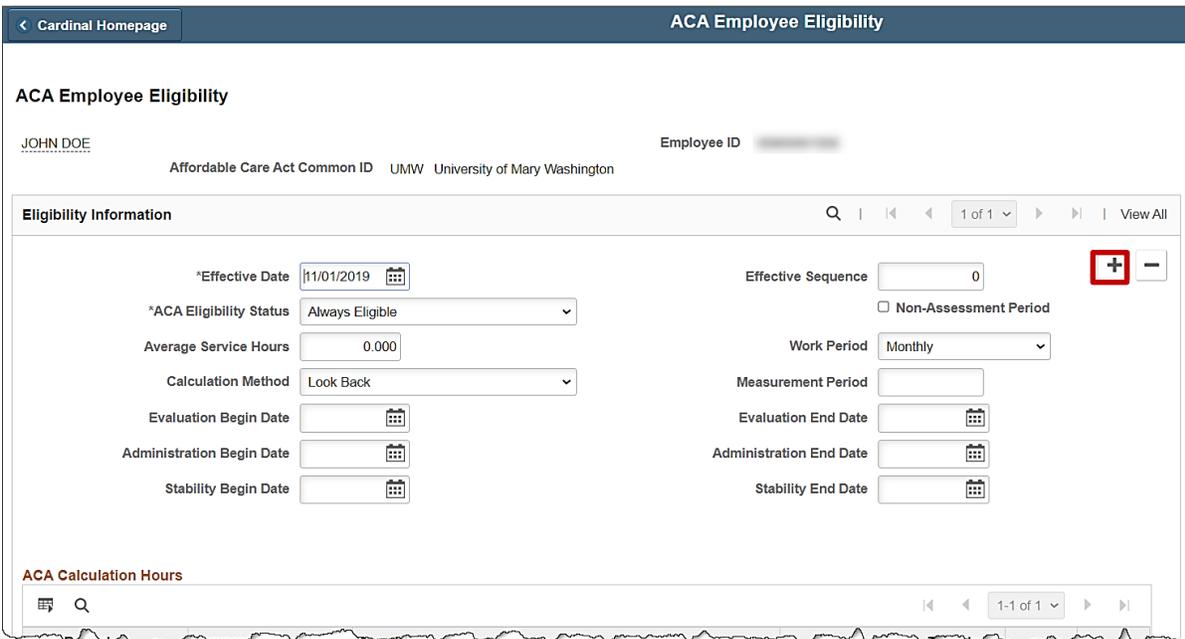
**Navigator > Benefits > Employee/Dependent Information > ACA Employee Eligibility**

The **ACA Employee Eligibility Search** page displays.



2. Enter the Employee ID in the **Empl ID** field.
3. Click on the **Search** button.

The **ACA Employee Eligibility** page displays with the employee's information.



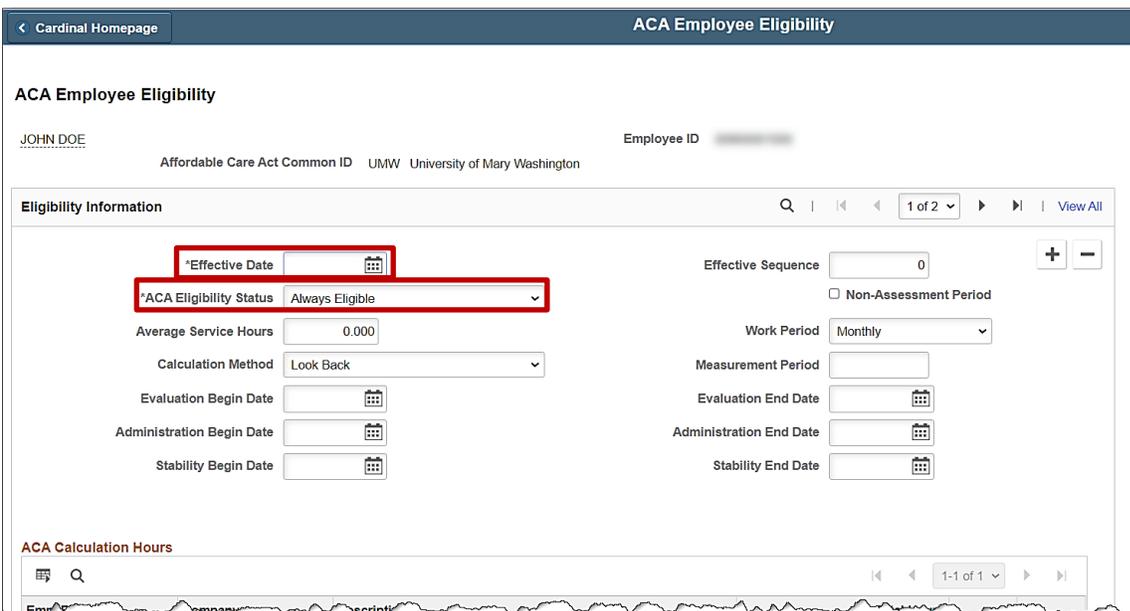
The screenshot shows the "ACA Employee Eligibility" page for employee JOHN DOE. The page title is "ACA Employee Eligibility". Below the header, the employee's name "JOHN DOE" and "Employee ID" are displayed. The page is for "Affordable Care Act Common ID UMW University of Mary Washington". The "Eligibility Information" section contains the following fields:

*Effective Date	11/01/2019	Effective Sequence	0
*ACA Eligibility Status	Always Eligible	<input type="checkbox"/> Non-Assessment Period	
Average Service Hours	0.000	Work Period	Monthly
Calculation Method	Look Back	Measurement Period	
Evaluation Begin Date		Evaluation End Date	
Administration Begin Date		Administration End Date	
Stability Begin Date		Stability End Date	

The "Effective Sequence" field has a red box around the "+" button next to it. The "1 of 1" pagination indicator is visible at the bottom right of the table.

4. Click on the "+" button to add a new row.

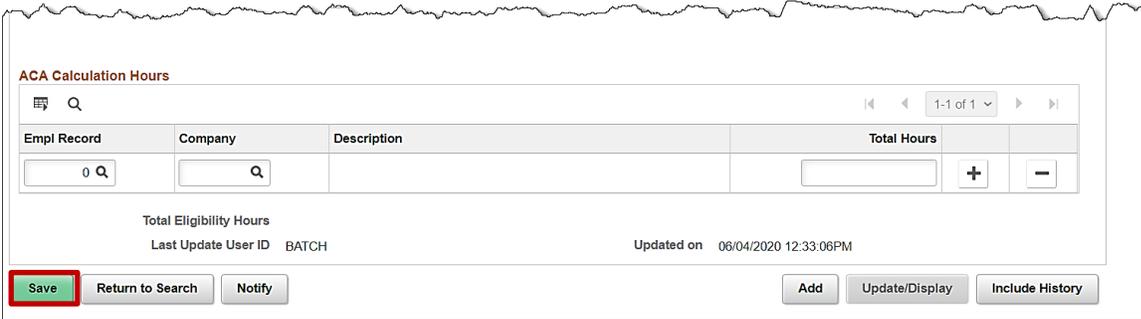
The **ACA Employee Eligibility** page refreshes with a new row.



The screenshot shows the "ACA Employee Eligibility" page for employee JOHN DOE, now displaying two rows of information. The "Eligibility Information" section contains the following fields:

*Effective Date		Effective Sequence	0
*ACA Eligibility Status	Always Eligible	<input type="checkbox"/> Non-Assessment Period	
Average Service Hours	0.000	Work Period	Monthly
Calculation Method	Look Back	Measurement Period	
Evaluation Begin Date		Evaluation End Date	
Administration Begin Date		Administration End Date	
Stability Begin Date		Stability End Date	

The "Effective Date" and "\*ACA Eligibility Status" fields in the first row are highlighted with red boxes. The "Effective Sequence" field has a red box around the "+" button next to it. The "1 of 2" pagination indicator is visible at the bottom right of the table.



ACA Calculation Hours

Empl Record Company Description Total Hours

Total Eligibility Hours

Last Update User ID BATCH Updated on 06/04/2020 12:33:06PM

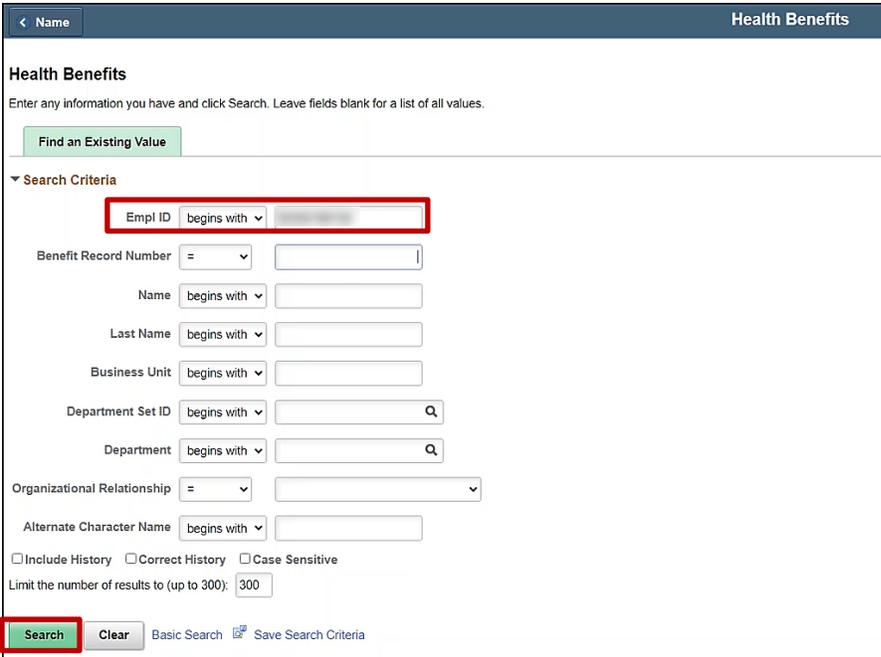
Save Return to Search Notify Add Update/Display Include History

5. The Effective Date will default to the current date. Change the **Effective Date** to be the top of the month in which the employee is being enrolled in Medicare.
6. Select **Excluded** from the drop-down menu next to **Eligibility Status**.
7. Click the **Save** button.

**Process the Medicare Manual Event**

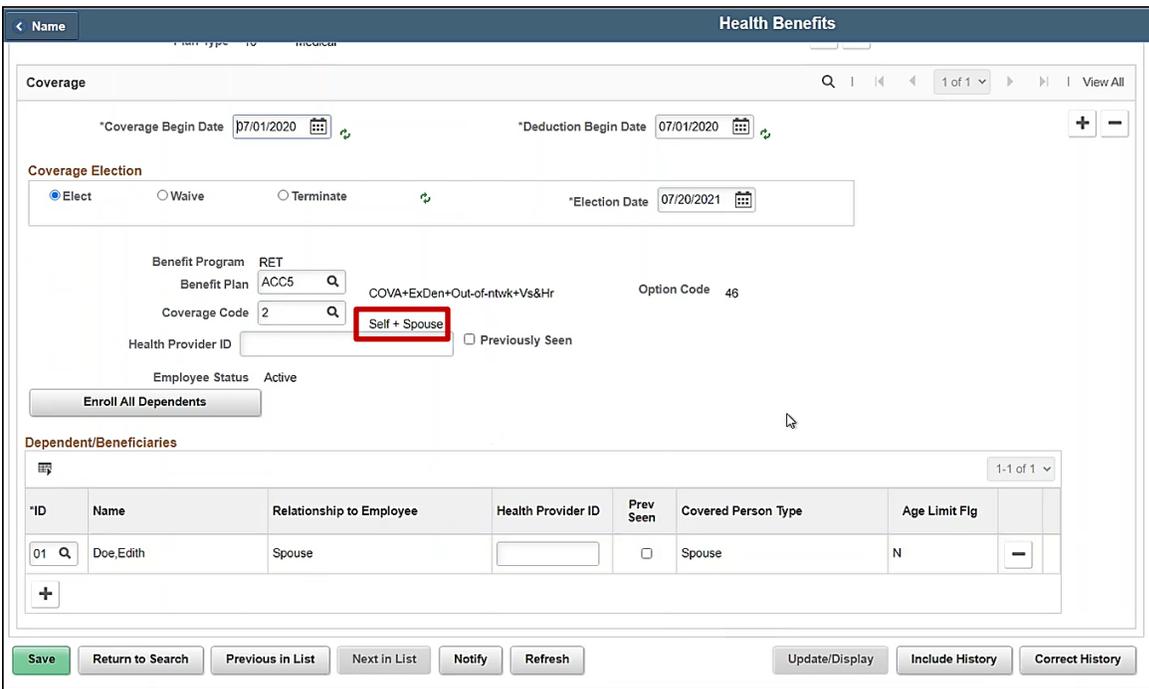
To enroll the employee in Medicare, the Benefit Administrator (BA) must first add a **GEM** Manual Event through the **BAS Activity** page and then process the enrollment through the **On-Demand Event Maintenance** page. Before adding the manual event for the employee, the Agency BA must confirm that the employee has a spouse listed in their current benefit enrollment.

1. Access the **Health Benefit** page by using the following path:  
**Navigator > Benefits > Enroll in Benefits > Health Benefits**



2. Enter the **Empl ID**.
3. Click **Search**.

The **Health Benefit** page refreshes.



**Health Benefits**

Coverage

\*Coverage Begin Date: 07/01/2020      \*Deduction Begin Date: 07/01/2020

Coverage Election

Elect     Waive     Terminate    \*Election Date: 07/20/2021

Benefit Program: RET  
 Benefit Plan: ACC5  
 Coverage Code: 2    **Self + Spouse**    Option Code: 46

Health Provider ID:     Previously Seen

Employee Status: Active

**Enroll All Dependents**

**Dependent/Beneficiaries**

ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg
01	Doe, Edith	Spouse		<input type="checkbox"/>	Spouse	N

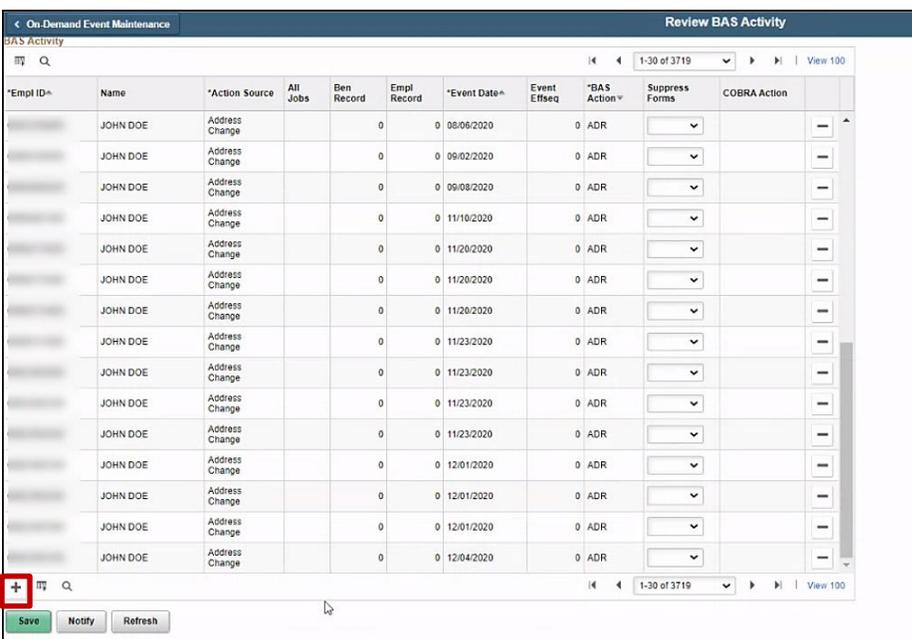
Buttons: Save, Return to Search, Previous in List, Next in List, Notify, Refresh, Update/Display, Include History, Correct History

**Note:** Here the Agency BA can see that the employee currently has a Self + Spouse medical coverage with their Spouse covered under the current medical plan.

- Navigate to the **BAS Activity** page to add the manual event for the employee using the following path:

**Benefit Administrator tile > Manage Automated Enrollment > Review BAS Activity**

The **Review BAS Activity** page displays.



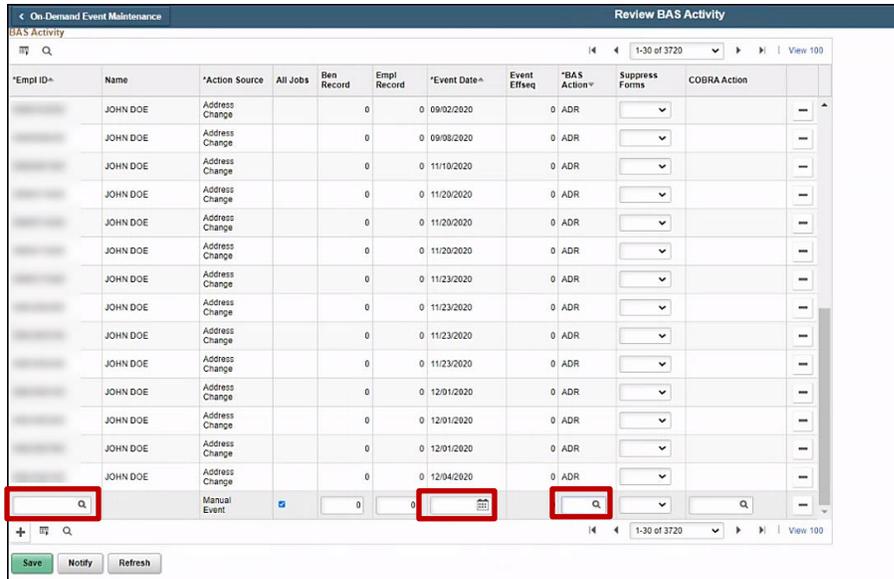
**Review BAS Activity**

Empl ID	Name	Action Source	All Jobs	Ben Record	Empl Record	Event Date	Event Effseq	BAS Action	Suppress Forms	COBRA Action
	JOHN DOE	Address Change			0	08/09/2020	0	ADR		
	JOHN DOE	Address Change			0	09/02/2020	0	ADR		
	JOHN DOE	Address Change			0	09/08/2020	0	ADR		
	JOHN DOE	Address Change			0	11/10/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/04/2020	0	ADR		

Buttons: Save, Notify, Refresh

5. Click the **+** sign to add row.

The **Review BAS Activity** page refreshes.



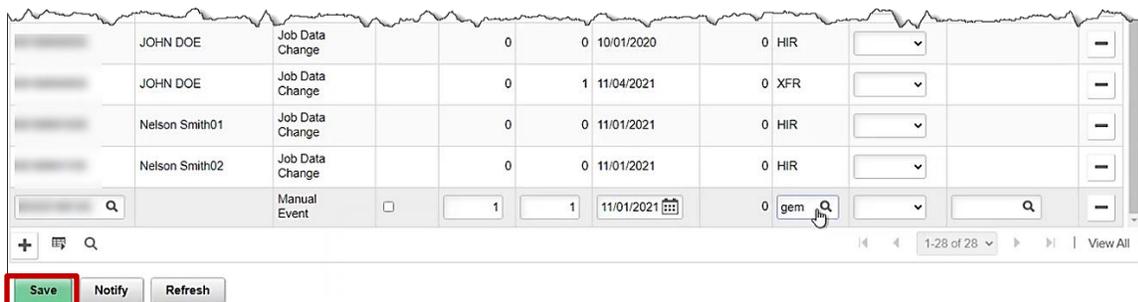
Empl ID	Name	Action Source	All Jobs	Ben Record	Empl Record	Event Date	Event Effseq	BAS Action	Suppress Forms	COBRA Action
JOHN DOE	JOHN DOE	Address Change			0	09/02/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	09/08/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/10/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
JOHN DOE	JOHN DOE	Address Change			0	12/04/2020	0	ADR		
		Manual Event			0					

6. Enter the **Empl ID** in the first box to the left.

7. Enter the **Effective date** of the event in the date field (Same date as the Medicare Information Update).

8. Click on the magnifying class in the **BAS Action** section and select the **GEM** event (Gained Eligibility for Medicare).

The **BAS Activity** displays with the information in the new row.



Empl ID	Name	Action Source	All Jobs	Ben Record	Empl Record	Event Date	Event Effseq	BAS Action	Suppress Forms	COBRA Action
JOHN DOE	JOHN DOE	Job Data Change			0	0	10/01/2020	0	HIR	
JOHN DOE	JOHN DOE	Job Data Change			0	1	11/04/2021	0	XFR	
Nelson Smith01	Nelson Smith01	Job Data Change			0	0	11/01/2021	0	HIR	
Nelson Smith02	Nelson Smith02	Job Data Change			0	0	11/01/2021	0	HIR	
		Manual Event			1	1	11/01/2021	0	gem	

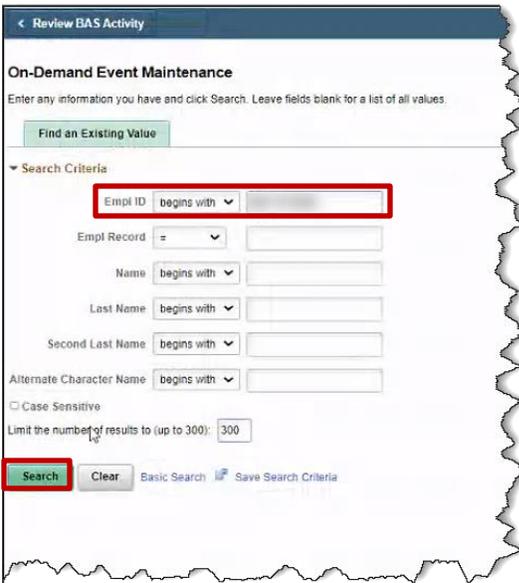
**Note:** The Agency BA needs to confirm the Manual Event is being added to the correct employee and benefit record number.

9. Click **Save**.

10. Navigate to the **On-Demand Event Maintenance** page by using the following path:

**Homepage > Benefit Administrator tile > Benefit Management > On-Demand Event Maintenance page**

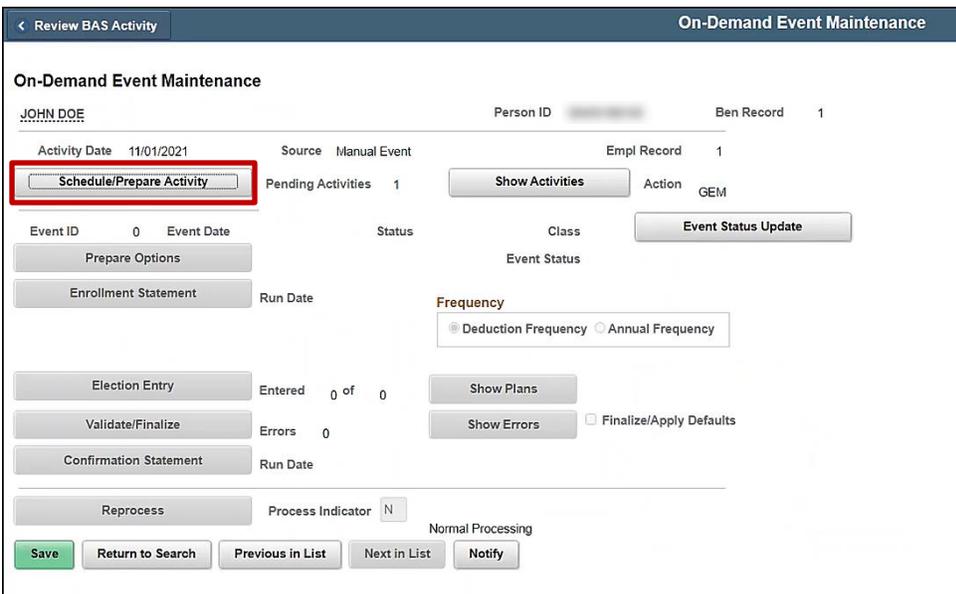
The **On-Demand Event Maintenance** page search page displays.



11. Enter the **Empl ID**.

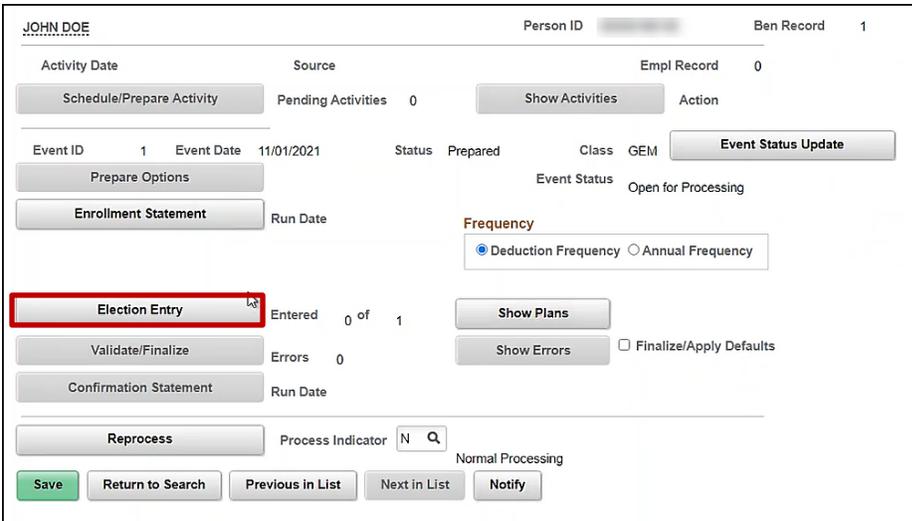
12. Click **Search**.

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



13. Click the **Schedule/Prepare Activity** button.

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



JOHN DOE Person ID [REDACTED] Ben Record 1

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 11/01/2021 Status Prepared Class GEM Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency  
 Deduction Frequency  Annual Frequency

**Election Entry** Entered 0 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

Confirmation Statement Run Date

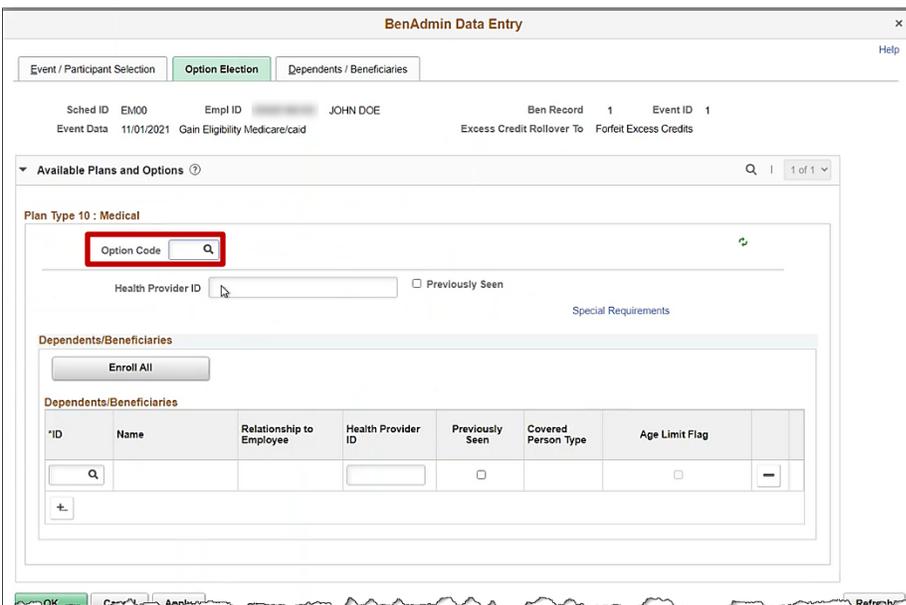
Reprocess Process Indicator N Q Normal Processing

Save Return to Search Previous in List Next in List Notify

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

**Note:** The GEM event is not available in Employee Self Service (ESS), so the BA needs to elect on behalf of the employee.

The **BenAdmin Data Entry** page displays.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] JOHN DOE Ben Record 1 Event ID 1

Event Data 11/01/2021 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

**Option Code** [magnifying glass icon]

Health Provider ID   Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

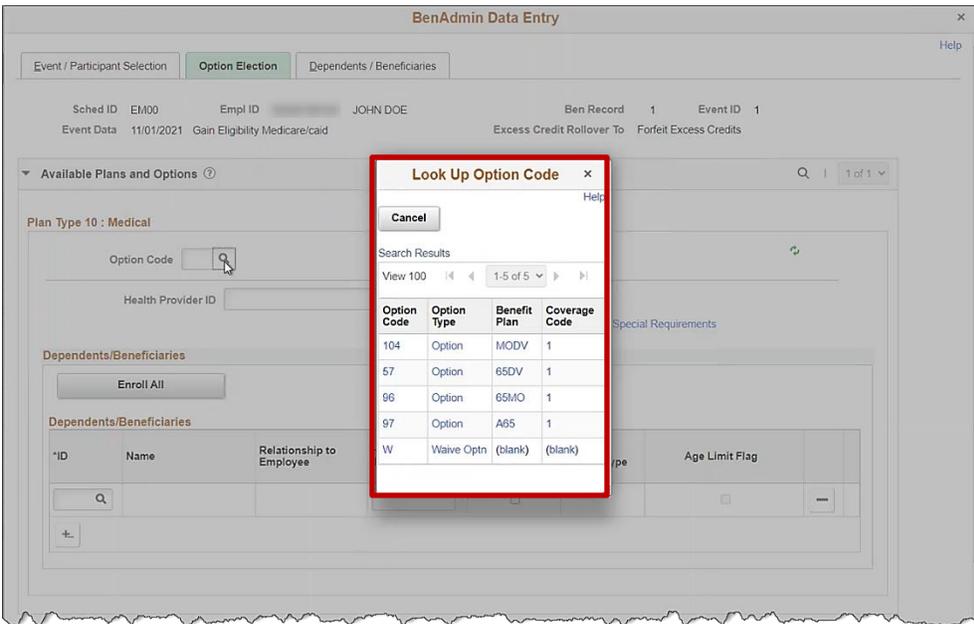
Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
[magnifying glass icon]			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>

OK Cancel Apply Refresh

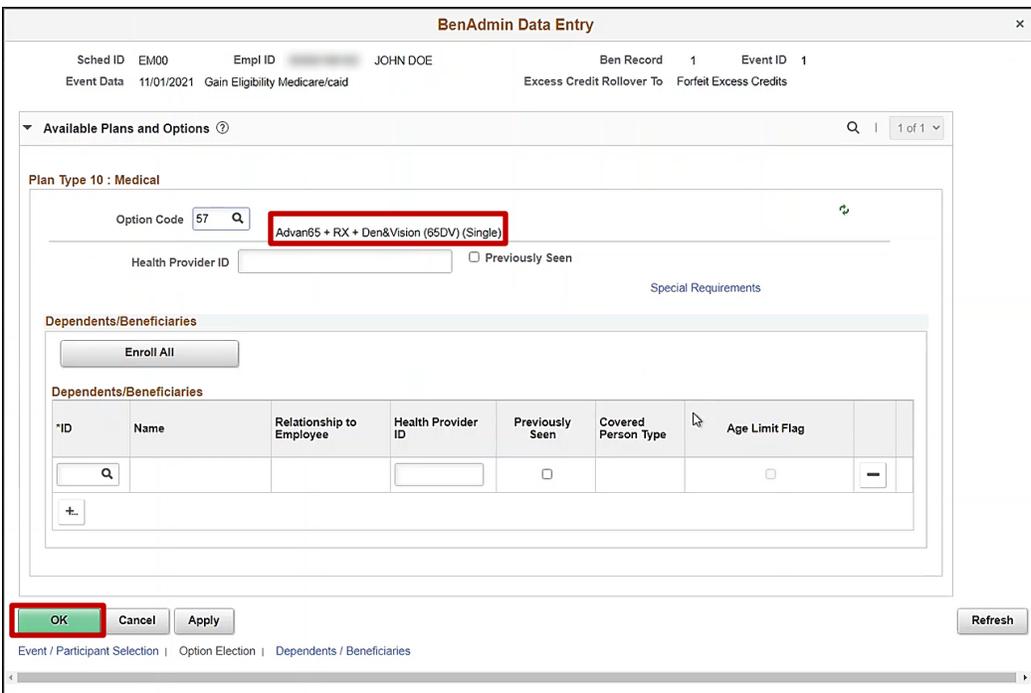
15. Click on the magnifying glass to select a **Plan Type 10: Medical** plan.

The **Look Up Option Code** pop-up appears.



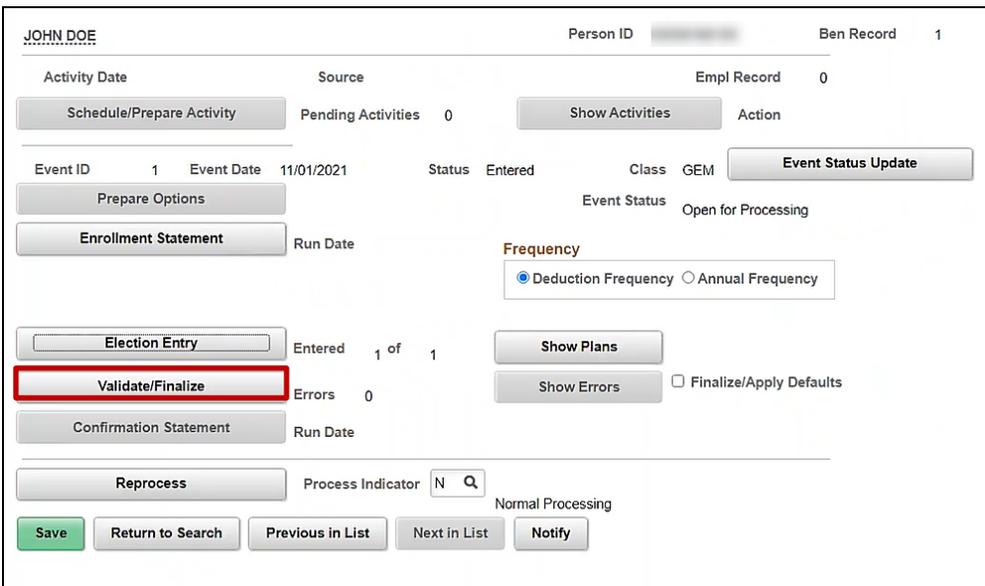
16. Select a **Medical** plan.

The **BenAdmin Data Entry** page returns.



17. Click **OK**.

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



JOHN DOE Person ID [REDACTED] Ben Record 1

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 11/01/2021 Status Entered Class GEM Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency  Annual Frequency

Election Entry Entered 1 of 1 Show Plans

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

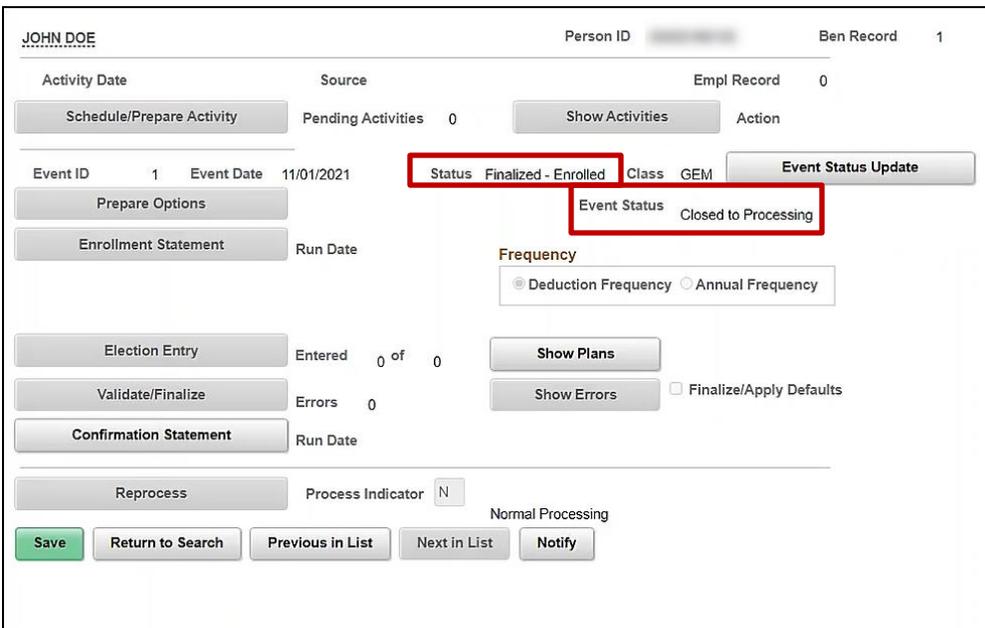
Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Previous in List Next in List Notify

18. Click **Validate/Finalize**.

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



JOHN DOE Person ID [REDACTED] Ben Record 1

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 11/01/2021 **Status Finalized - Enrolled** Class GEM Event Status Update

Prepare Options **Event Status Closed to Processing**

Enrollment Statement Run Date Frequency

Deduction Frequency  Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

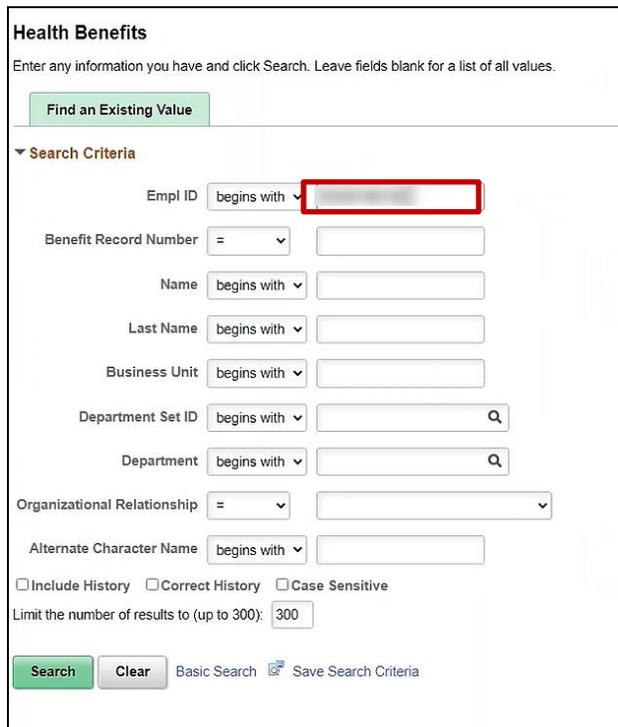
Save Return to Search Previous in List Next in List Notify

19. Confirm the **Status** is Finalized-Enrolled, and the **Event Status** is Closed for Processing.

20. Navigate to the **Health Benefits** page to confirm the updated medical plan enrollment for the employee by using the following path:

**Navigator > Benefits > Enroll in Benefits > Health Benefits**

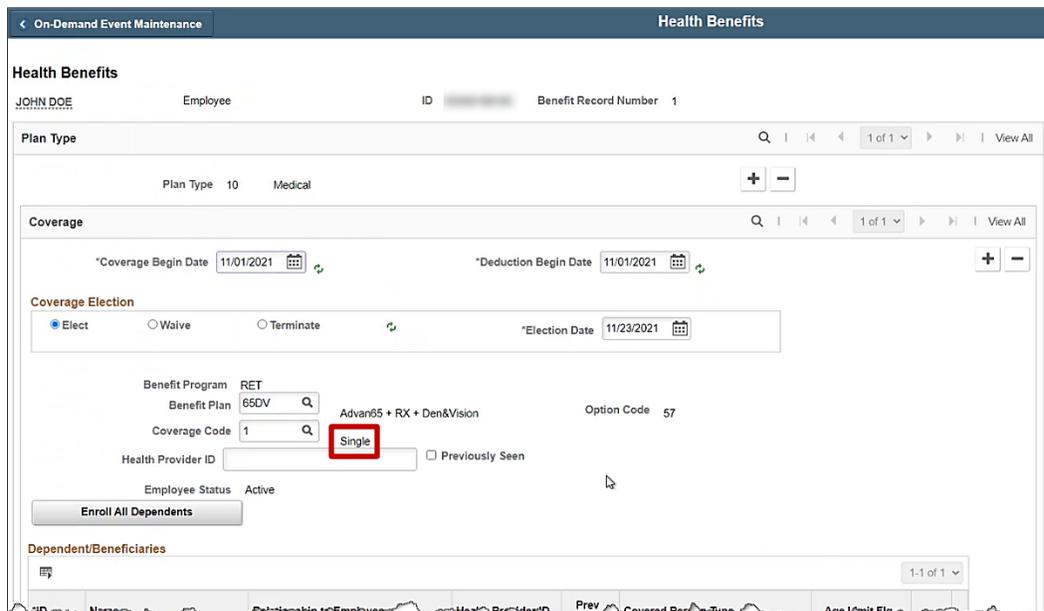
The **Health Benefits** search page displays.



21. Enter the **Empl ID**.

22. Click **Search**.

The **Health Benefits** page displays.



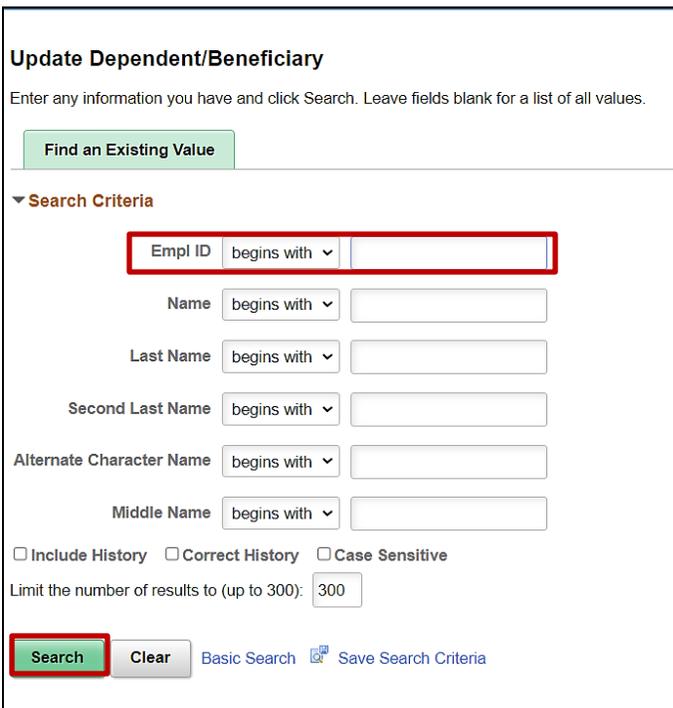
**Note:** Now the Agency BA can see that the employee has **Single** medical benefit plan coverage.

### Hire the Spouse as an Employee

Before hiring the spouse as an employee, the Agency BA must gather the personal information (e.g., Social Security number, date of birth, etc.) from the **Update Dependent/Beneficiary** page. Once the information is gathered, then the Agency BA can complete the hire process.

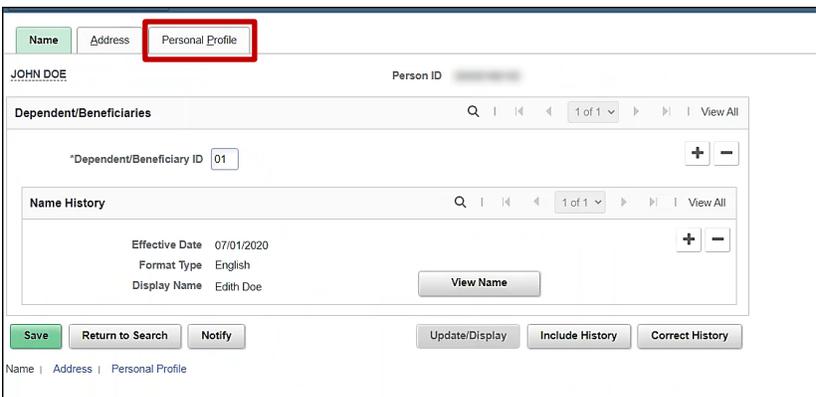
1. Navigate to the **Update Dependent/Beneficiary** page using the following path:  
**Benefit Administrator tile > Employee/Dependent Information > Update Dependent/Beneficiary**

The **Update Dependent/Beneficiary** search page displays.



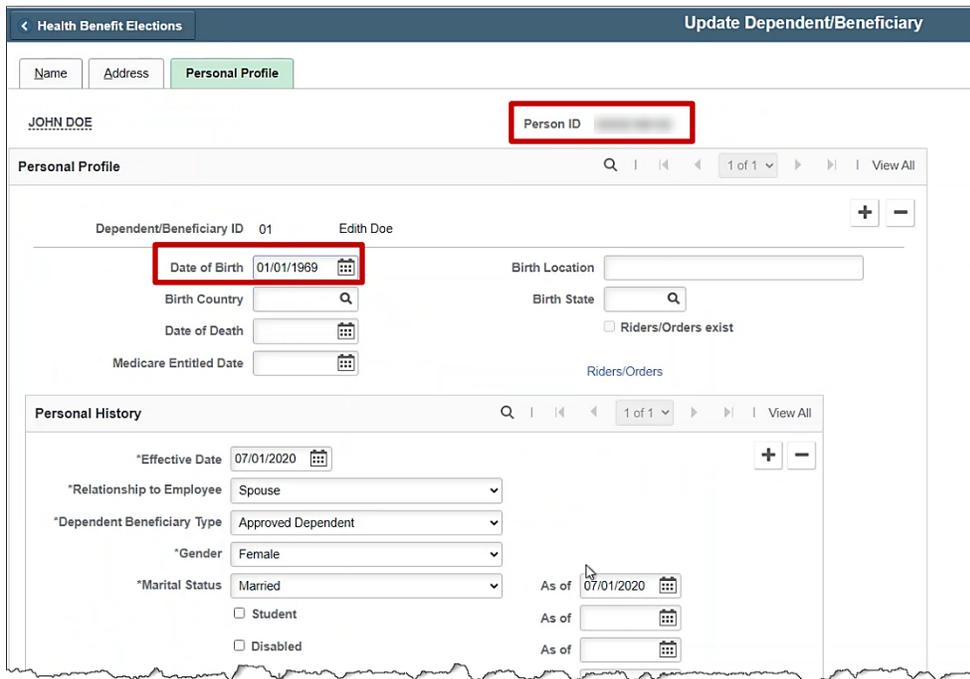
2. Enter the **Empl ID** of the employee.

The **Dependent/Beneficiary** page will display.



3. Click on the **Personal Profile** tab.

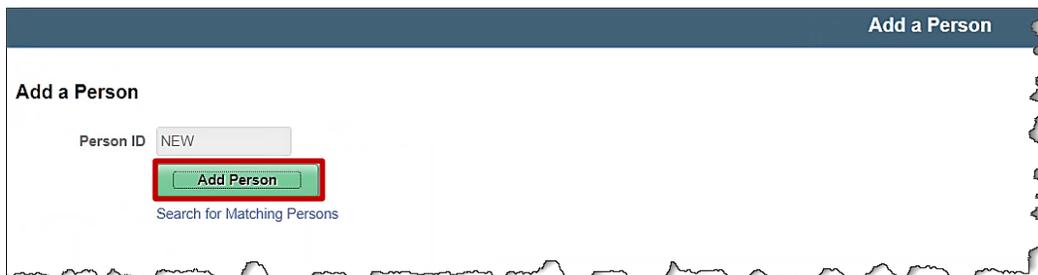
The **Personal Profile** tab displays.



The screenshot shows the 'Update Dependent/Beneficiary' interface. At the top, there are tabs for 'Name', 'Address', and 'Personal Profile'. The 'Personal Profile' tab is active. Below the tabs, the name 'JOHN DOE' is displayed, followed by a 'Person ID' field which is highlighted with a red box. The main section is titled 'Personal Profile' and shows details for 'Edith Doe' with 'Dependent/Beneficiary ID 01'. The 'Date of Birth' field is set to '01/01/1969' and is highlighted with a red box. Other fields include 'Birth Location', 'Birth Country', 'Birth State', 'Date of Death', and 'Medicare Entitled Date'. There are also sections for 'Riders/Orders' and 'Personal History' with various dropdown menus and dates.

4. Write down the dependent's **Date of Birth** and the **Social Security** number. In addition, write down the **Empl ID** of the Employee for future use.
5. Navigate to the **Add a Person** page to hire the dependent into Cardinal using the following path: **Navigator > Workforce Administration > Personal Information > Biographical > Add a Person**

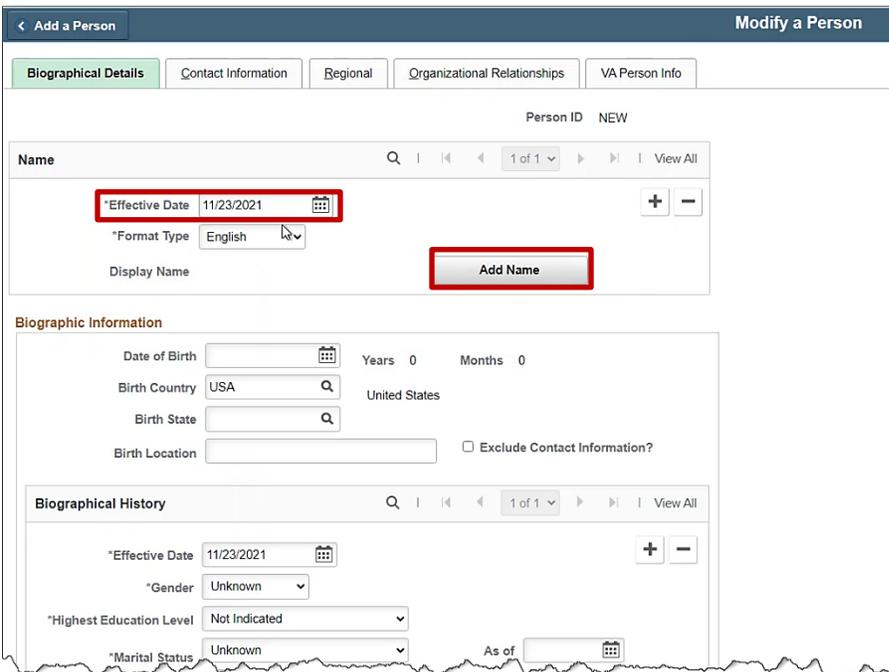
The **Add a Person** page displays.



The screenshot shows the 'Add a Person' page. At the top right, there is a header 'Add a Person'. Below it, the text 'Add a Person' is displayed. There is a 'Person ID' field with the value 'NEW'. Below the field is a green button labeled 'Add Person', which is highlighted with a red box. Underneath the button, it says 'Search for Matching Persons'.

6. Click on **Add Person** button.

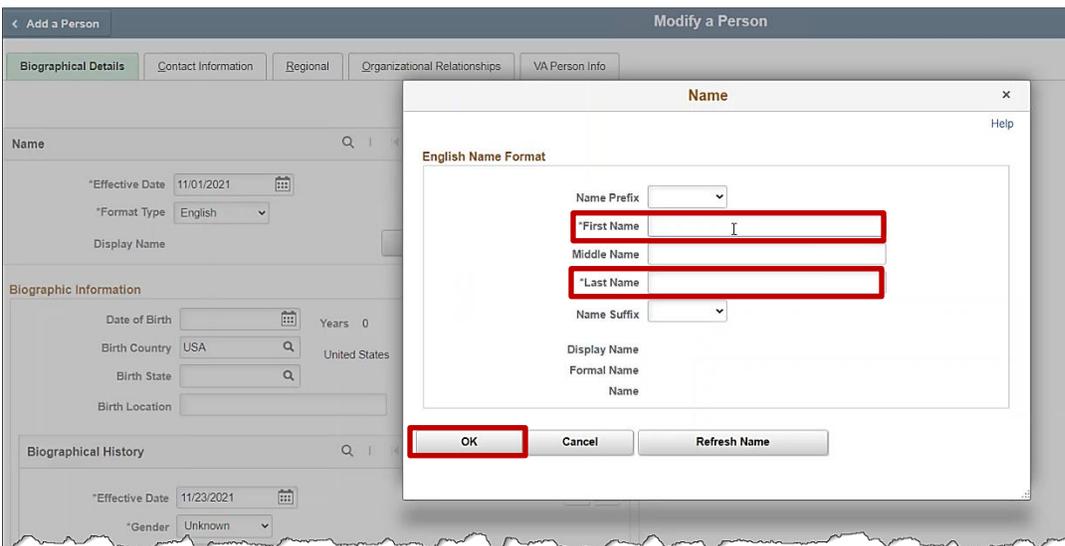
The **Modify a Person** page displays.



The screenshot shows the 'Modify a Person' page with the 'Name' section active. The 'Effective Date' field is set to 11/23/2021 and is highlighted with a red box. The 'Format Type' is set to English. The 'Add Name' button is also highlighted with a red box. Below the 'Name' section is the 'Biographic Information' section, which includes fields for Date of Birth, Birth Country (USA), Birth State, and Birth Location. There is also a 'Biographical History' section with fields for Effective Date, Gender, Highest Education Level, and Marital Status.

7. Change the **Effective Date** to the day the dependent is Medicare eligible.
8. Click on **Add Name** button.

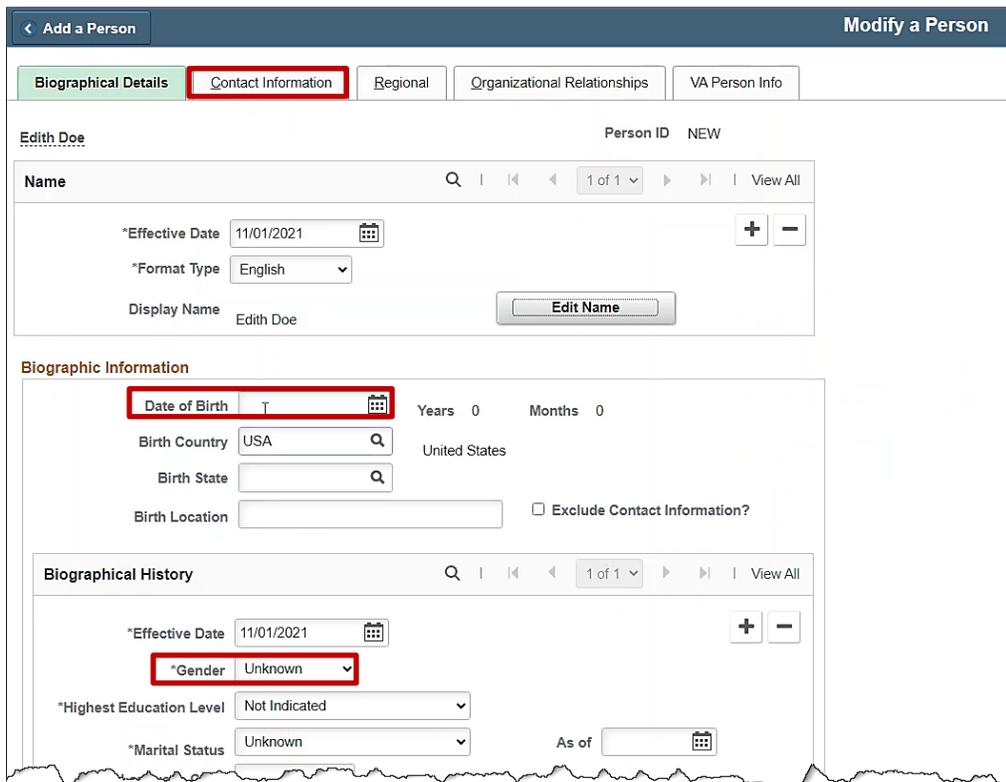
The **Name** page displays.



The screenshot shows the 'Name' dialog box with the 'English Name Format' section. The 'First Name' and 'Last Name' fields are highlighted with red boxes. The 'OK' button is also highlighted with a red box. The dialog box includes fields for Name Prefix, First Name, Middle Name, Last Name, Name Suffix, Display Name, Formal Name, and Name. There are 'OK', 'Cancel', and 'Refresh Name' buttons at the bottom.

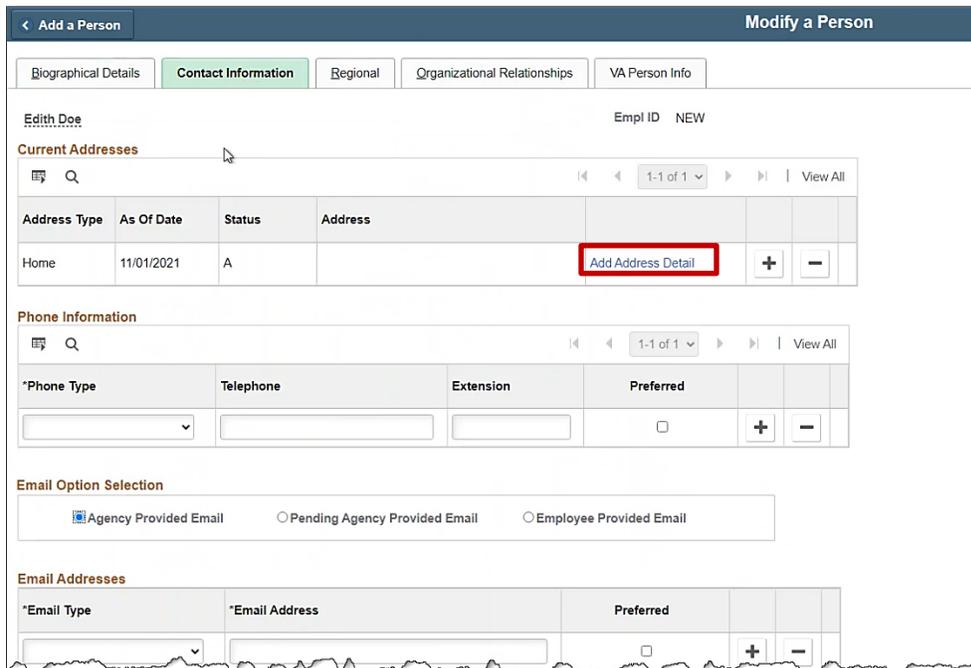
9. Add the dependent's **name information**.
10. Click **OK**.

The **Modify a Person** page returns.



11. Enter the **Date of Birth**.
12. Select a **Gender**.
13. At the bottom of the page, enter the **Social Security** number.
14. Click on the **Contact Information** tab.

The **Contact Information** tab displays.



Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

Edith Doe Empl ID NEW

Current Addresses

Address Type	As Of Date	Status	Address
Home	11/01/2021	A	<a href="#">Add Address Detail</a>

Phone Information

*Phone Type	Telephone	Extension	Preferred
			<input type="checkbox"/>

Email Option Selection

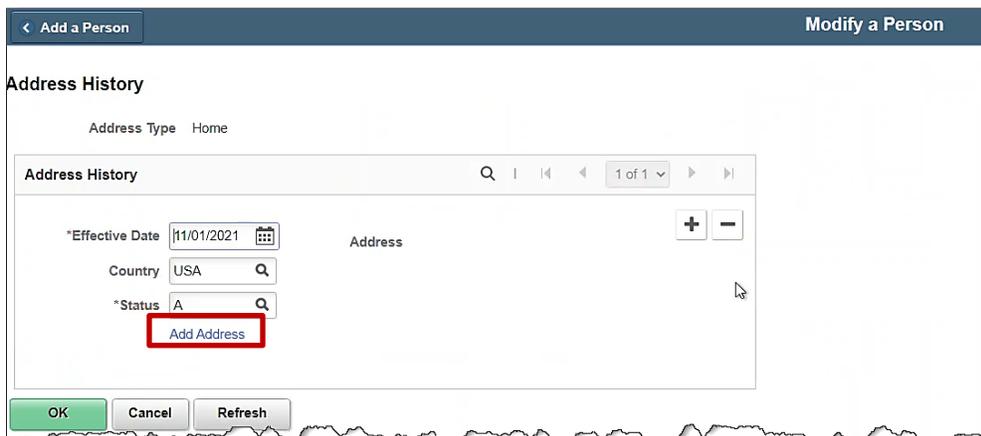
Agency Provided Email  Pending Agency Provided Email  Employee Provided Email

Email Addresses

*Email Type	*Email Address	Preferred
		<input type="checkbox"/>

15. Click on the **Add Address Detail** hyperlink.

The **Address History** page displays.



Address History

Address Type Home

Address History

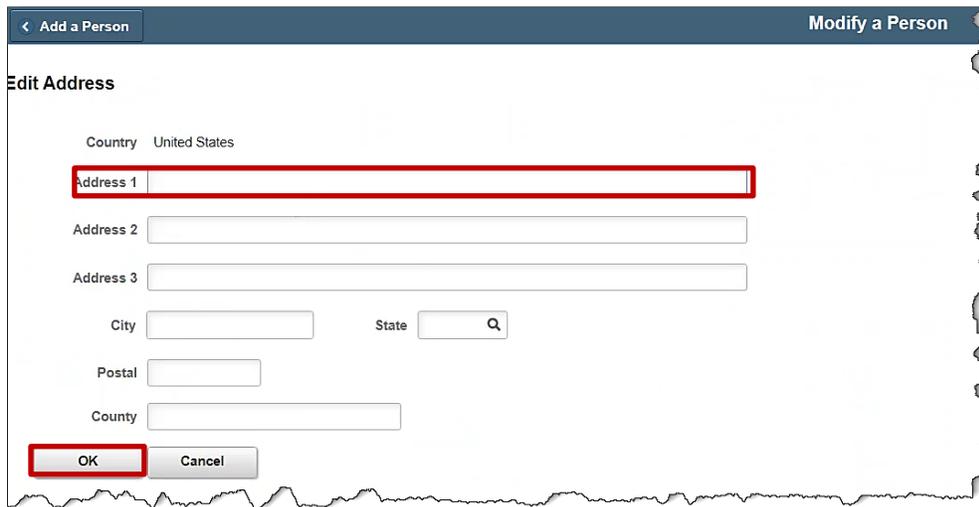
*Effective Date	11/01/2021	Address
Country	USA	
*Status	A	

[Add Address](#)

OK Cancel Refresh

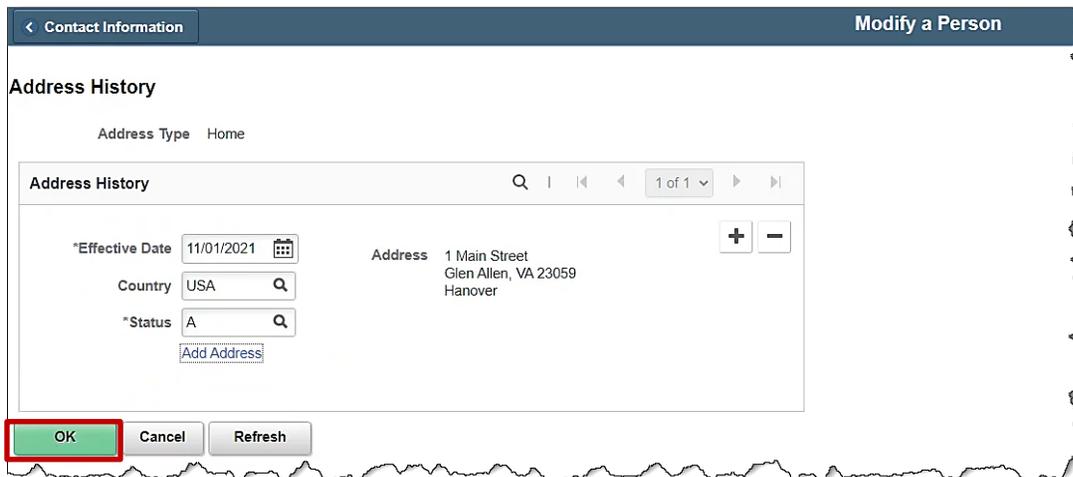
16. Click on **Add Address** hyperlink.

The **Edit Address** page displays.



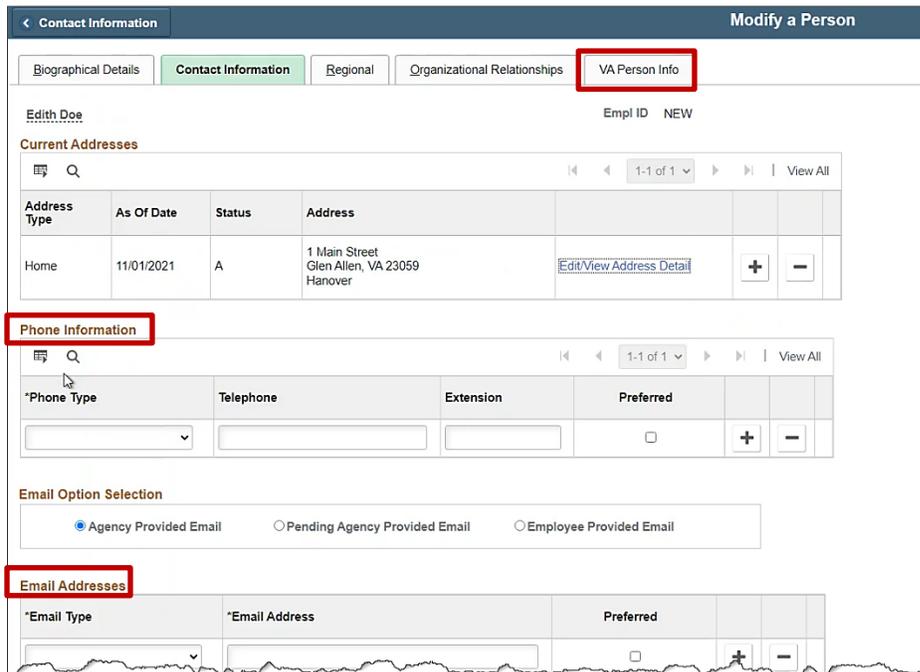
17. Enter the dependent's **address**.
18. Click **OK**.

The Address History page displays.



19. Click **OK**.

The **Contact Information** tab displays.



← Contact Information Modify a Person

Biographical Details **Contact Information** Regional Organizational Relationships **VA Person Info**

Edith Doe Empl ID NEW

**Current Addresses**

Address Type	As Of Date	Status	Address		
Home	11/01/2021	A	1 Main Street Glen Allen, VA 23059 Hanover	<a href="#">Edit/View Address Detail</a>	+ -

**Phone Information**

*Phone Type	Telephone	Extension	Preferred		
			<input type="checkbox"/>	+ -	

**Email Option Selection**

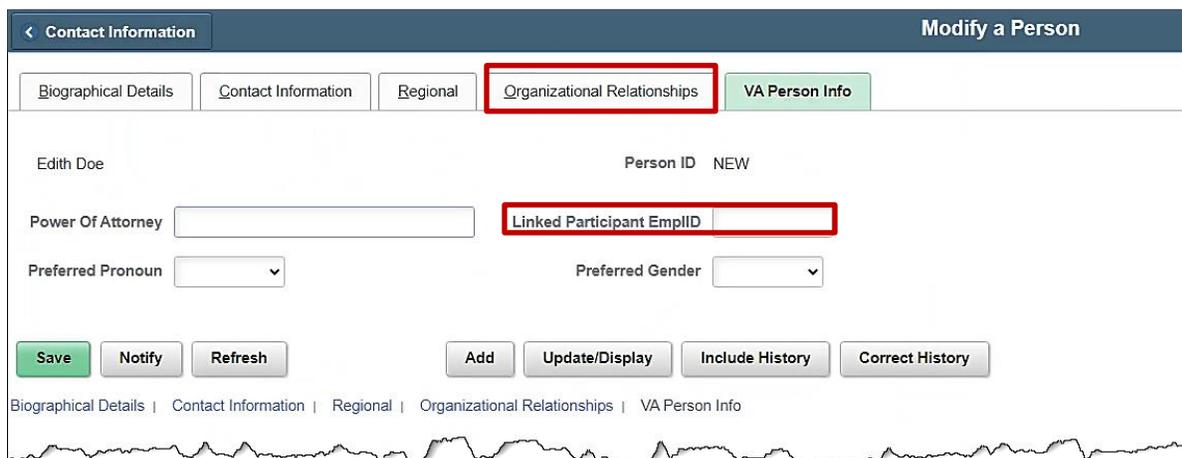
Agency Provided Email  Pending Agency Provided Email  Employee Provided Email

**Email Addresses**

*Email Type	*Email Address	Preferred		
		<input type="checkbox"/>	+ -	

20. Enter the **Phone Number** information.
21. Enter the **Email** information.
22. Click on the **VA Person Info** tab.

The **VA Person Info** tab displays.



← Contact Information Modify a Person

Biographical Details Contact Information Regional **Organizational Relationships** **VA Person Info**

Edith Doe Person ID NEW

Power Of Attorney  **Linked Participant EmplID**

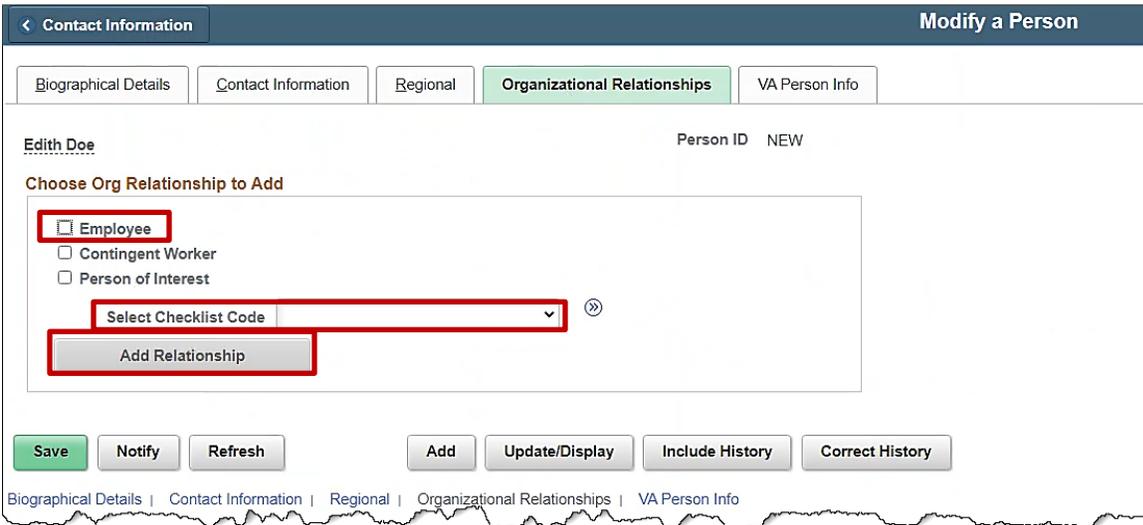
Preferred Pronoun  Preferred Gender

**Save** **Notify** **Refresh** **Add** **Update/Display** **Include History** **Correct History**

Biographical Details | Contact Information | Regional | Organizational Relationships | **VA Person Info**

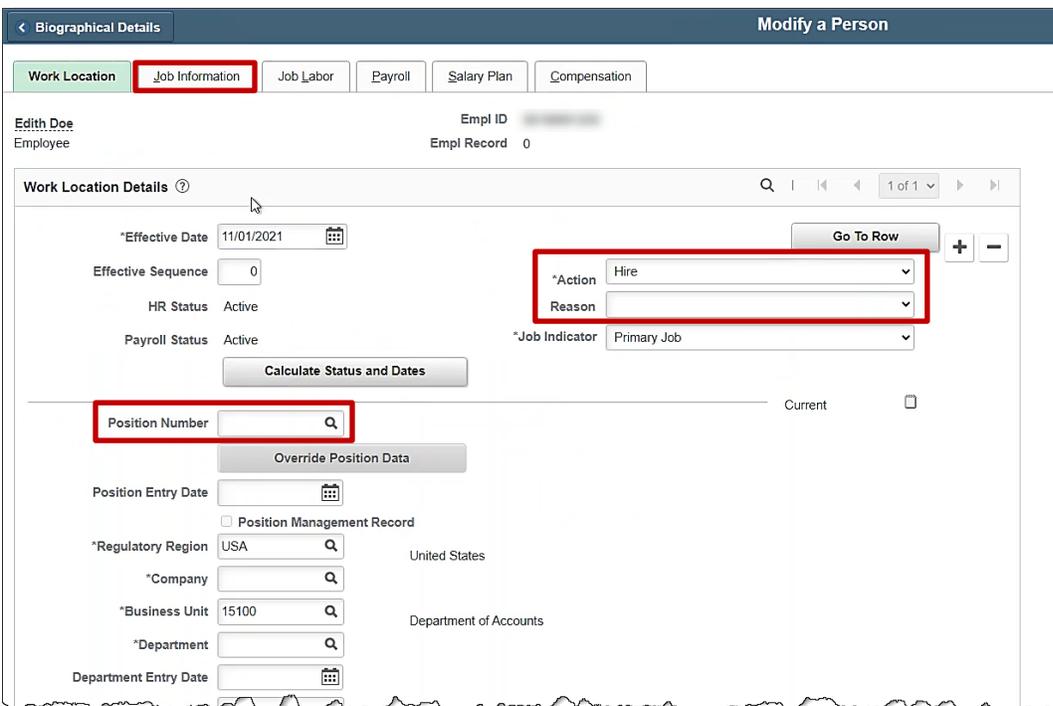
23. Input the **Employee's Empl ID** in the **Linked Participant EmplID** field.
24. Click on the **Organization Relationship** tab.

The **Organizational Relationship** tab displays.



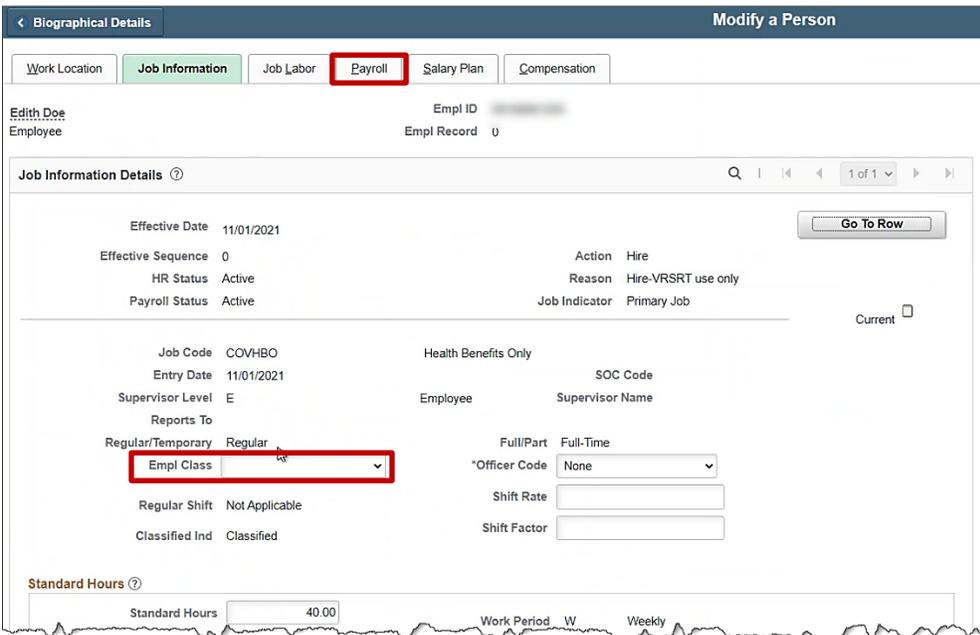
25. Check the box next to **Employee**.
26. Select **Hire** from the drop-down menu next to **Select Checklist Code**.
27. Click **Add Relationship** button.

The **Work Location** tab displays.



28. Select **Hire-VRSRT use only** from the drop-down menu next to **Reason**.
29. Enter the **Position Number** for **VRS Retiree Position**.
30. Click on the **Job Information** tab.

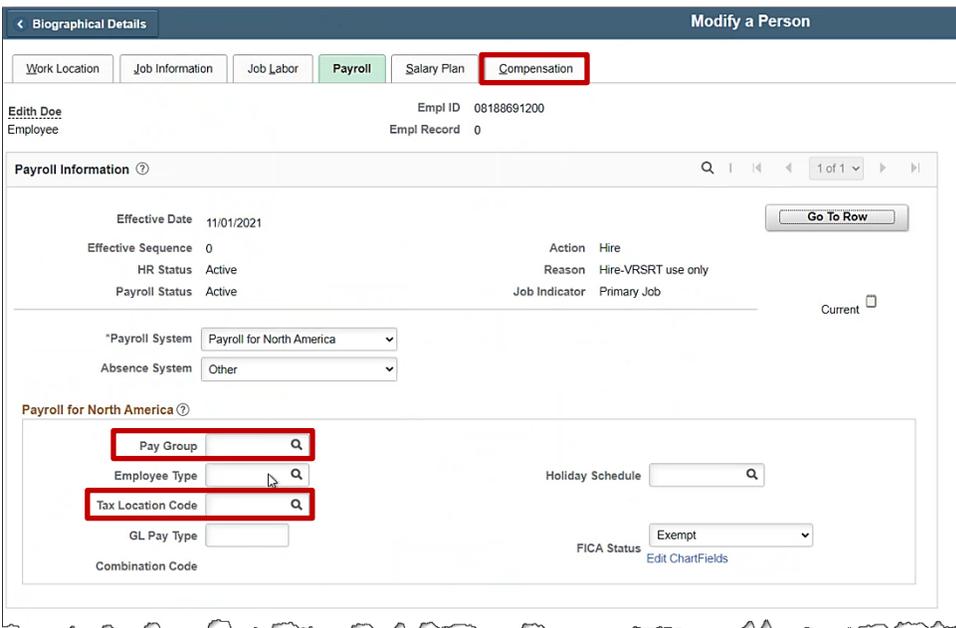
The **Job Information** tab displays.



The screenshot shows the 'Modify a Person' interface with the 'Job Information' tab selected. The 'Empl Class' dropdown menu is highlighted with a red box. Other visible fields include Effective Date (11/01/2021), Job Code (COV/HBO), and Standard Hours (40.00).

31. Select **VRSRetiree** from the drop-down menu next to **Empl Class**.
32. Click on the **Payroll** tab.

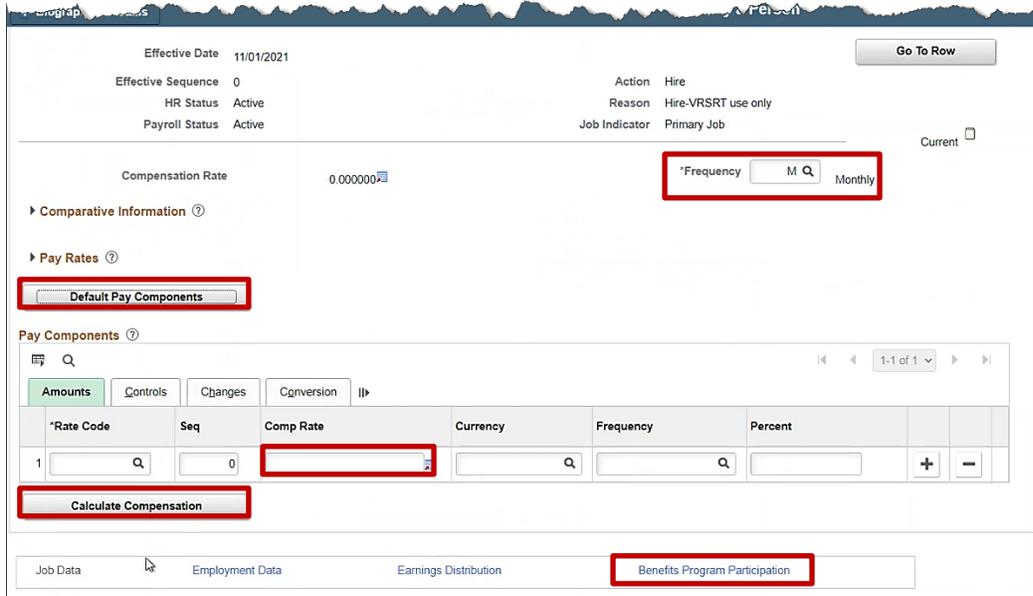
The **Payroll** tab displays.



The screenshot shows the 'Modify a Person' interface with the 'Payroll' tab selected. The 'Pay Group' and 'Tax Location Code' dropdown menus are highlighted with red boxes. Other visible fields include Effective Date (11/01/2021), Payroll System (Payroll for North America), and FICA Status (Exempt).

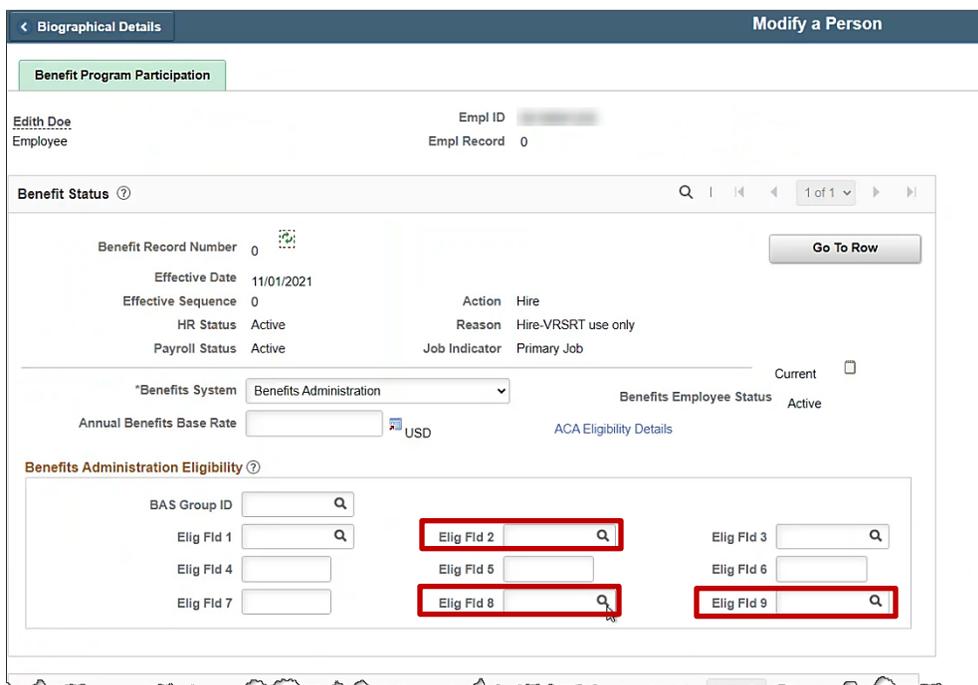
33. Select the **MNP (Non-Payroll) Pay Group**.
34. Input the corresponding **Tax Location code**.

The **Compensation** tab displays.



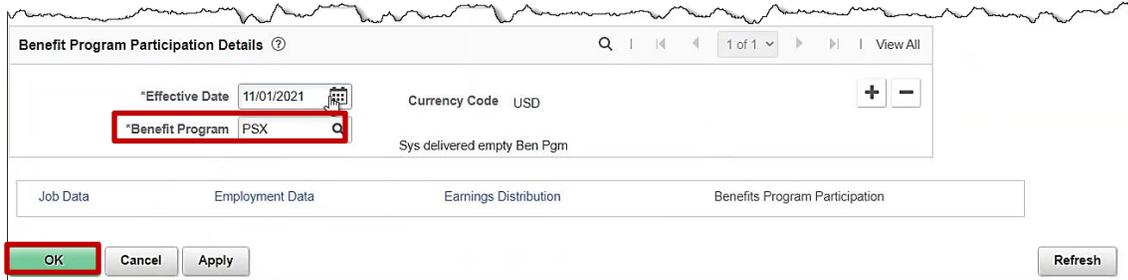
35. Change the **Frequency** to **M**.
36. Click on the **Default Pay Components** button.
37. Enter "0" in the **Com Rate** field.
38. Click on the **Calculate Compensation** button.
39. Click on the **Benefit Program Participation** hyperlink.

The **Benefit Program Participation** page displays.



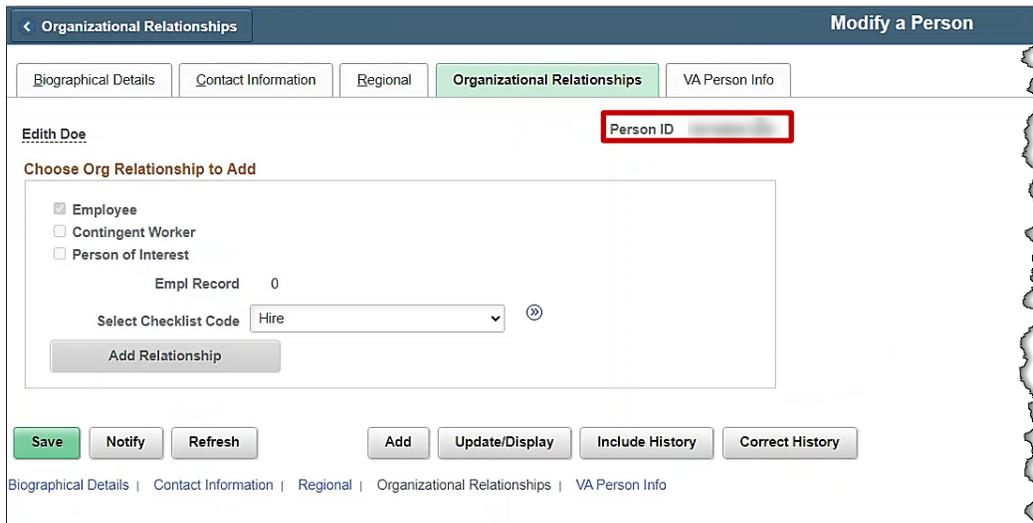
40. Enter **Elig Fid 2** (e.g., 005001000).
41. Enter **Elig Fid 8** (e.g., 12-12).
42. Enter **Elig Fid 9** (e.g., LS-GB).
43. Scroll down to the bottom of the page.

The **Benefit Program Participation** bottom of the page displays.



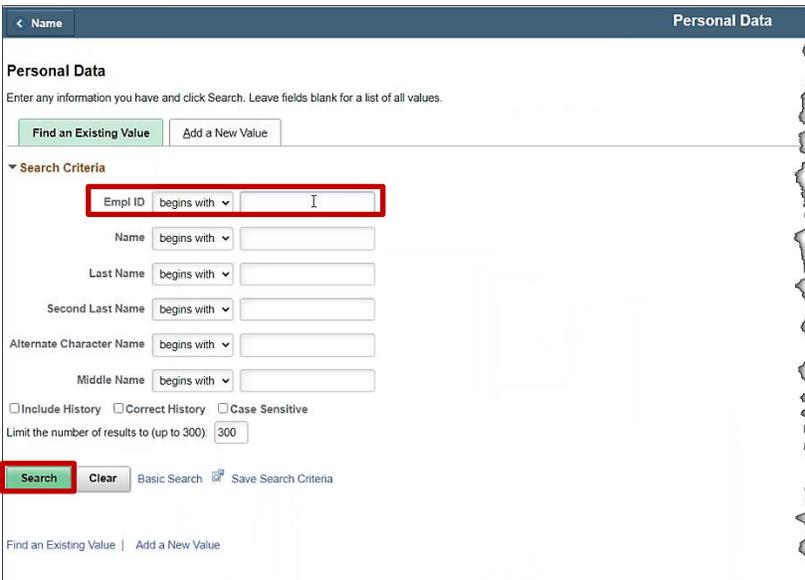
44. Change the **Benefit Program** to **RET**.
45. Click **OK**.
46. Click **OK** through any warning messages that pop-up.

The **Organization Relationships** page returns.



47. The dependent now has an Employee ID. Write down the **Person ID** (Empl ID) for future use.
48. Navigate to the **Modify a Person** page using the following path:  
**Navigator > Workforce Administration > Personal Information > Biographical > Modify a Person**

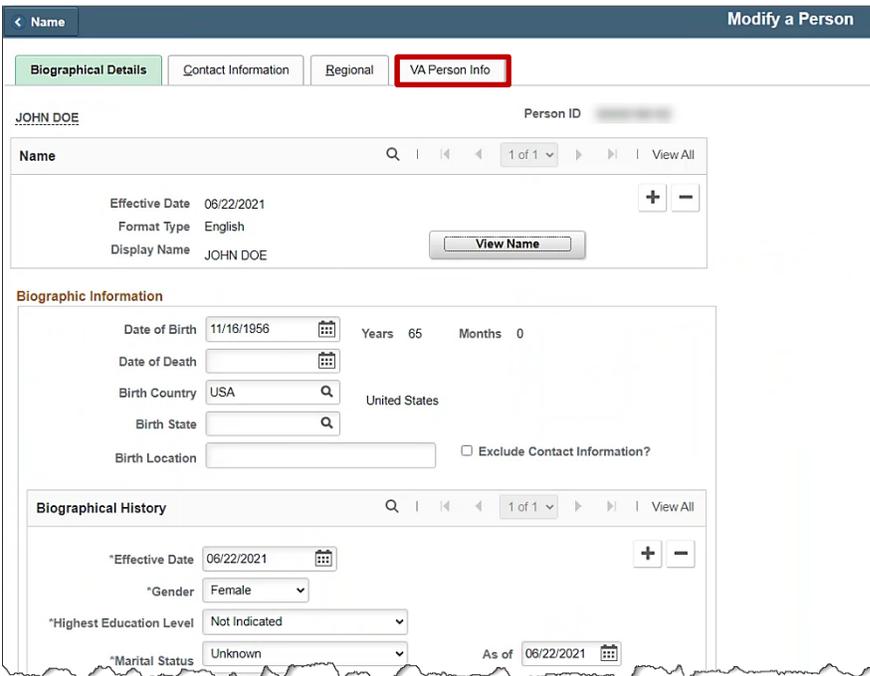
The **Personal Data** search page displays.



49. Enter the **Employee Empl ID**. (Recorded on Step 50)

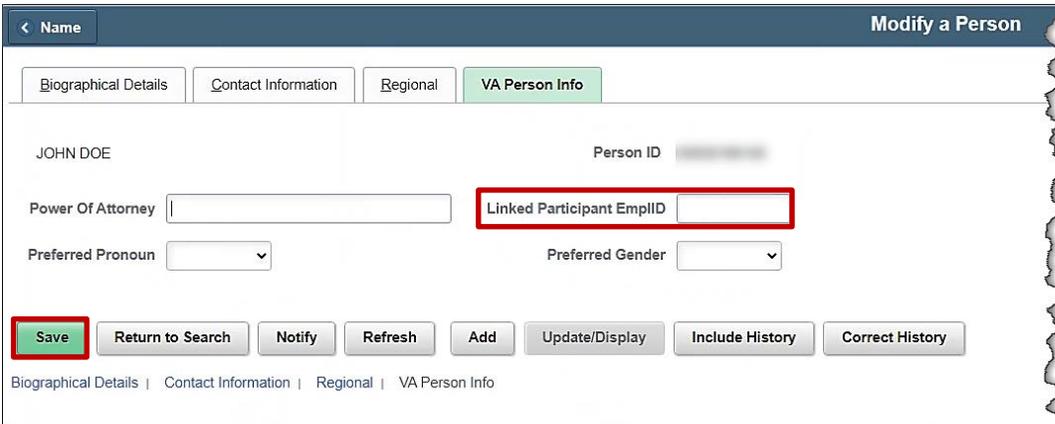
50. Click **Search**.

The **Modify a Person** page displays.



51. Click on the **VA Person Info** tab.

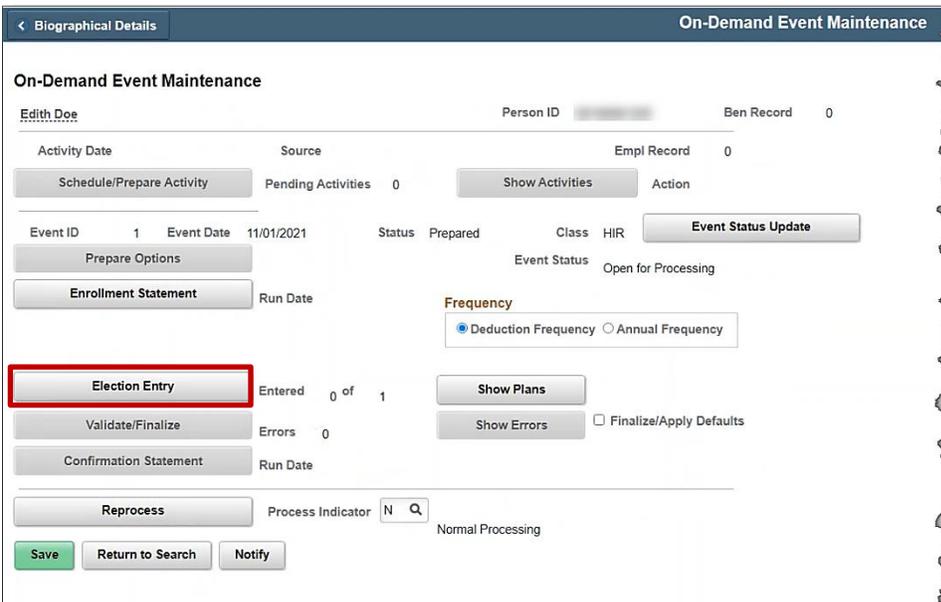
The **VA Person Info** tab displays.



The screenshot shows the 'Modify a Person' interface with the 'VA Person Info' tab selected. The form contains fields for 'JOHN DOE', 'Person ID', 'Power Of Attorney', 'Linked Participant EmplID', 'Preferred Pronoun', and 'Preferred Gender'. The 'Linked Participant EmplID' field is highlighted with a red box. Below the form, a row of buttons includes 'Save', 'Return to Search', 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'. The 'Save' button is also highlighted with a red box. A breadcrumb trail at the bottom reads: 'Biographical Details | Contact Information | Regional | VA Person Info'.

52. Enter the **Dependent's Empl ID** in the **Linked Participant EmplID** field.
53. Click **Save**.
54. Navigate to the **On-Demand Event Maintenance** page to process the dependent's new hire benefit event by using the following path:  
**Benefit Administrator tile > Managed Automated Enrollment > On-Demand Event Maintenance**

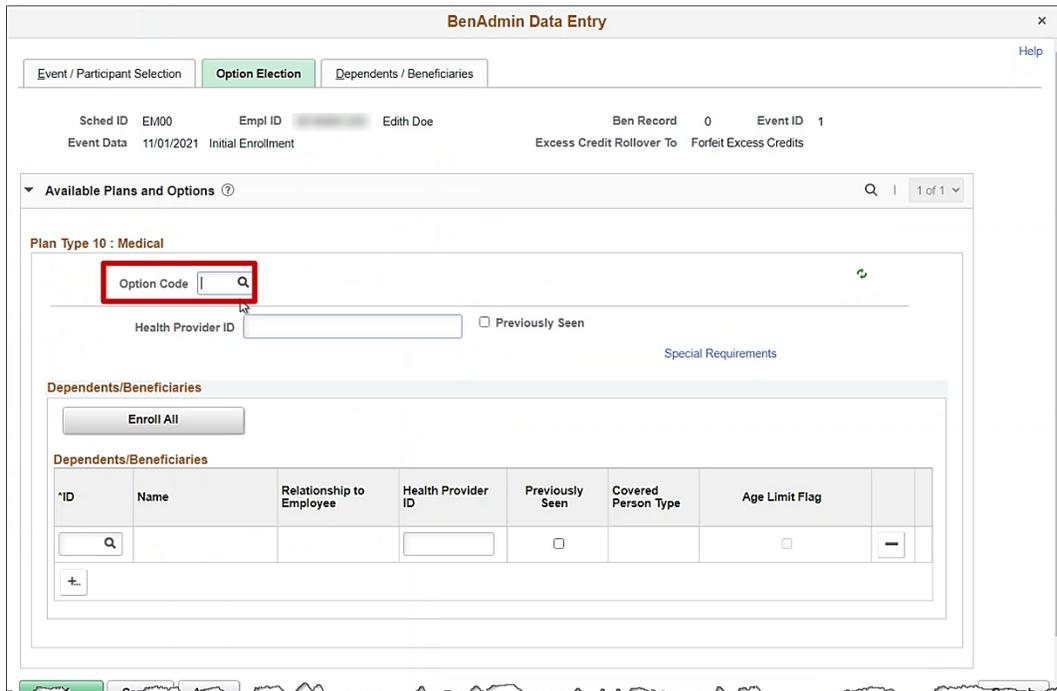
The **On-Demand Event Maintenance** page displays.



The screenshot shows the 'On-Demand Event Maintenance' page for 'Edith Doe'. The page displays various activity and event details, including 'Activity Date', 'Source', 'Empl Record', and 'Event ID'. The 'Event Status' is 'Prepared'. The 'Election Entry' button is highlighted with a red box. Other buttons include 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Show Plans', 'Show Errors', 'Finalize/Apply Defaults', 'Reprocess', 'Save', 'Return to Search', and 'Notify'. The 'Frequency' section has 'Deduction Frequency' selected. The 'Process Indicator' is 'N' and the status is 'Normal Processing'.

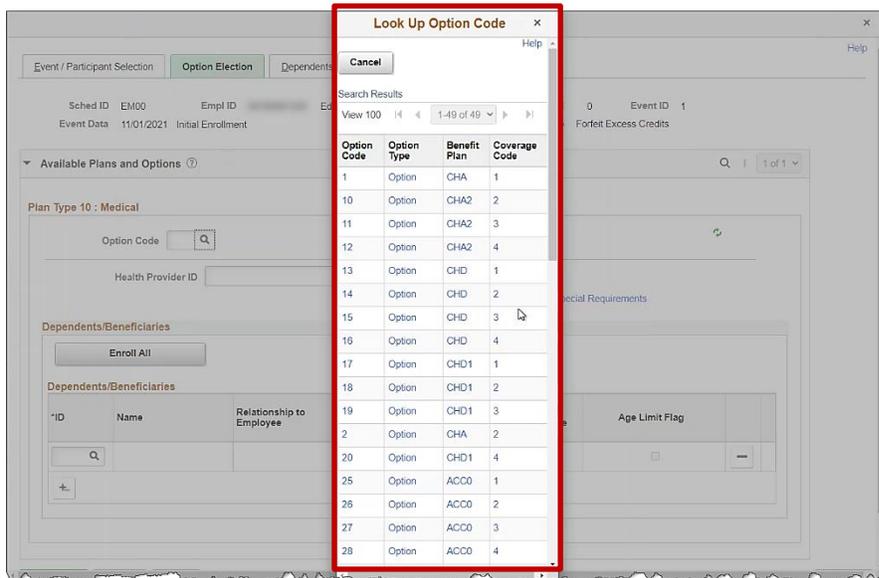
55. Since the Benefit Administration Process has run in Cardinal from the time of hire, the event is already **prepared**. Click on the **Election Entry** button to make the benefit elections for the dependent.

The **BenAdmin Data Entry** page displays.



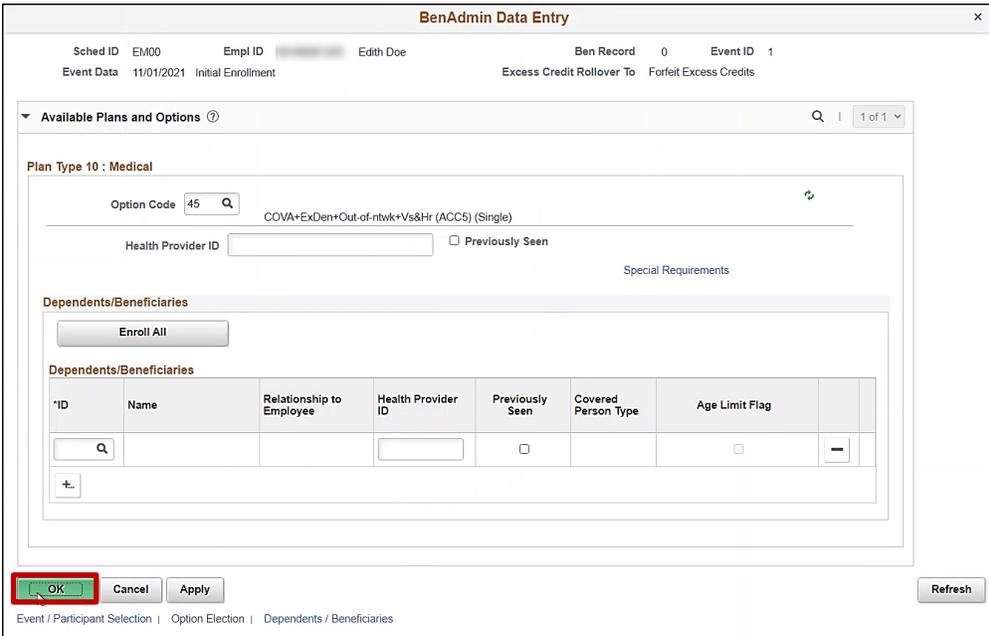
56. Click on the magnifying glass next to **Option Code** for **Plan Type 10: Medical**.

The **Look Up Option Code** pop-up appears.



57. Select a benefit plan with a **Coverage Code 1** for single coverage.

The **BenAdmin Data Entry** page refreshes.



**BenAdmin Data Entry**

Sched ID EM00    Empl ID [REDACTED]    Edith Doe    Ben Record 0    Event ID 1  
 Event Data 11/01/2021    Initial Enrollment    Excess Credit Rollover To    Forfeit Excess Credits

Available Plans and Options

Plan Type 10: Medical

Option Code 45    COVA+ExDen+Out-of-ntwk+Vs&Hr (ACC5) (Single)

Health Provider ID     Previously Seen    Special Requirements

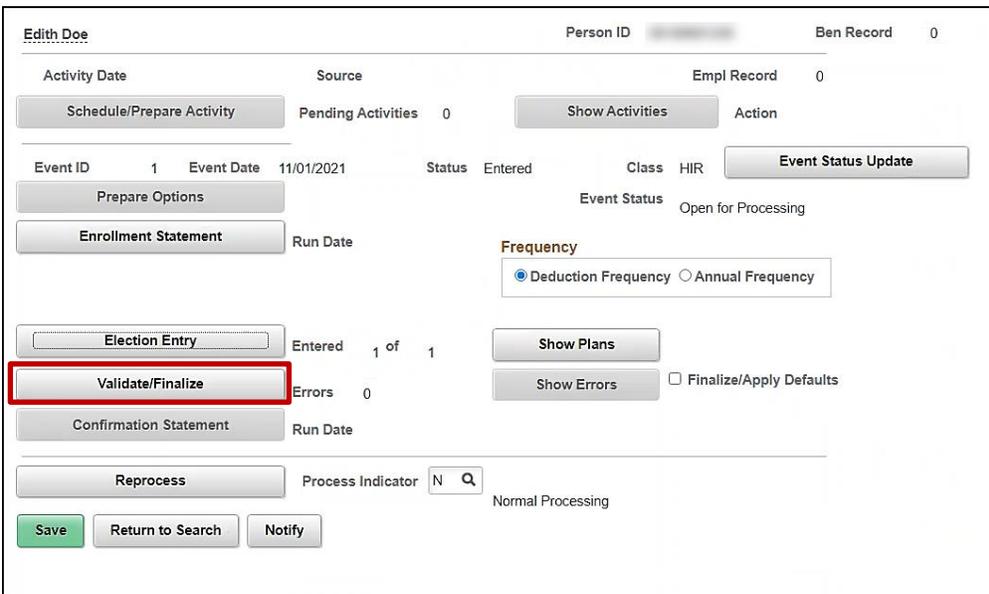
Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
Q				<input type="checkbox"/>		<input type="checkbox"/>

OK    Cancel    Apply    Refresh

58. Click **OK**.

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



**Edith Doe**    Person ID [REDACTED]    Ben Record 0

Activity Date    Source    Empl Record 0

Schedule/Prepare Activity    Pending Activities 0    Show Activities    Action

Event ID 1    Event Date 11/01/2021    Status Entered    Class HIR    Event Status Update

Prepare Options    Event Status Open for Processing

Enrollment Statement    Run Date    Frequency

Deduction Frequency     Annual Frequency

Election Entry    Entered 1 of 1    Show Plans

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

Confirmation Statement    Run Date

Reprocess    Process Indicator N    Normal Processing

Save    Return to Search    Notify

59. Click **Validate/Finalize** button.

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

<b>Edith Doe</b>		Person ID	██████████	Ben Record	0
Activity Date	Source	Empl Record	0		
<a href="#">Schedule/Prepare Activity</a>	Pending Activities	0	<a href="#">Show Activities</a>	Action	
Event ID	1	Event Date	11/01/2021	Status	Finalized - Enrolled
<a href="#">Prepare Options</a>		Class	HIR	<a href="#">Event Status Update</a>	
<a href="#">Enrollment Statement</a>	Run Date	Event Status: Closed to Processing			
<b>Frequency</b>					
<input checked="" type="radio"/> Deduction Frequency <input type="radio"/> Annual Frequency					
<a href="#">Election Entry</a>	Entered	0 of	0	<a href="#">Show Plans</a>	
<a href="#">Validate/Finalize</a>	Errors	0			
<a href="#">Confirmation Statement</a>	Run Date	<a href="#">Show Errors</a>	<input type="checkbox"/> Finalize/Apply Defaults		
<a href="#">Reprocess</a>	Process Indicator	N			
Normal Processing					
<a href="#">Save</a>	<a href="#">Return to Search</a>	<a href="#">Notify</a>			

**Note:** The employee is now enrolled in Medicare, the spouse has been hired into Cardinal, linked to the employee, and enrolled in single coverage medical.

### Scenario 3: Employee's dependent turns 65

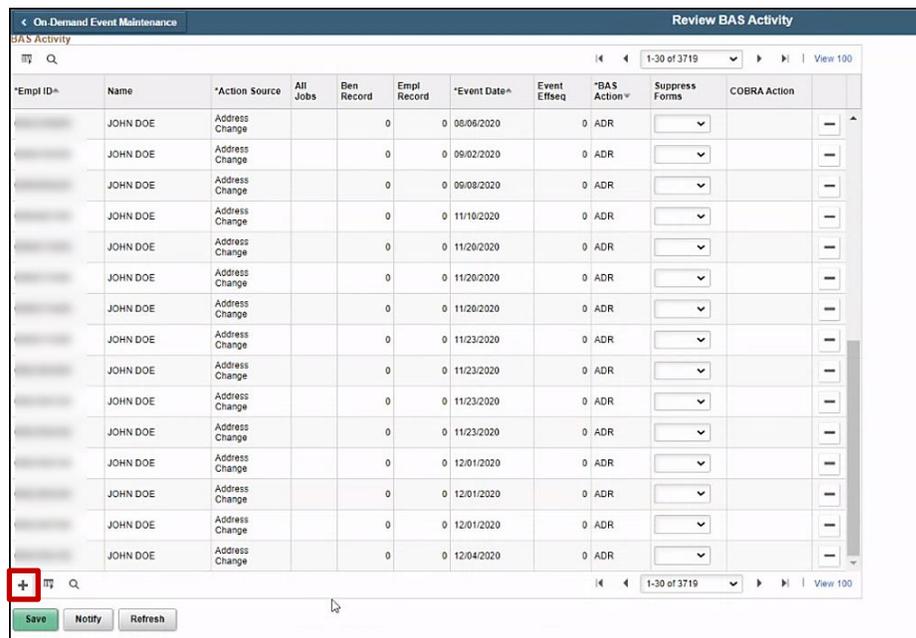
In this scenario, the employee has employee + spouse coverage, the employee is not eligible for Medicare, but the Spouse turns 65 and is eligible for Medicare. Once the BA confirms that the spouse is eligible for Medicare, the BA must add a **GEM** event to change the employee's coverage from Employee + Spouse to Single.

### Process the Medicare Manual Event

1. Access the **BAS Activity** page using the following path:

**Benefit Administrator tile > Manage Automated Enrollment > Review BAS Activity**

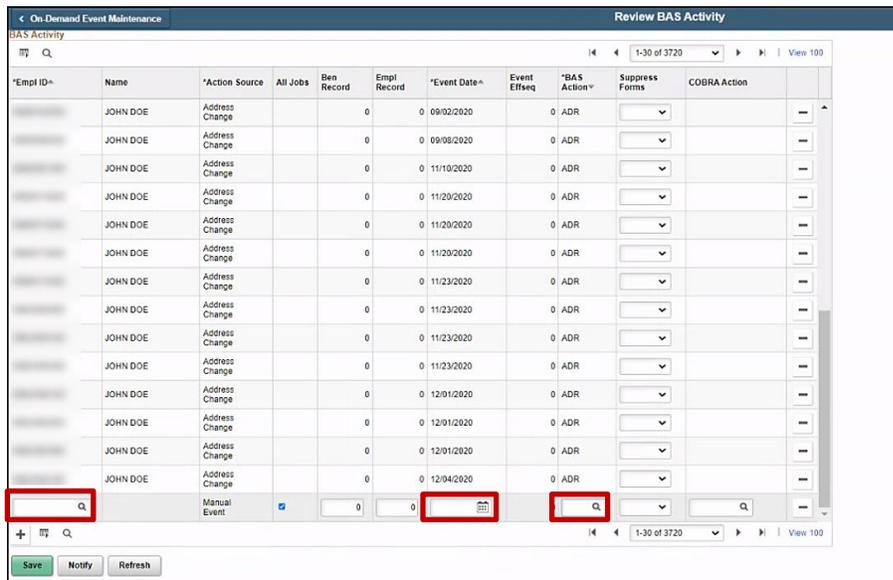
The **Review BAS Activity** page displays.



*Empl ID*	Name	*Action Source	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action
	JOHN DOE	Address Change			0	08/06/2020	0	ADR		
	JOHN DOE	Address Change			0	09/02/2020	0	ADR		
	JOHN DOE	Address Change			0	09/08/2020	0	ADR		
	JOHN DOE	Address Change			0	11/10/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/20/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	11/23/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/01/2020	0	ADR		
	JOHN DOE	Address Change			0	12/04/2020	0	ADR		

2. Click the **+** sign to add row.

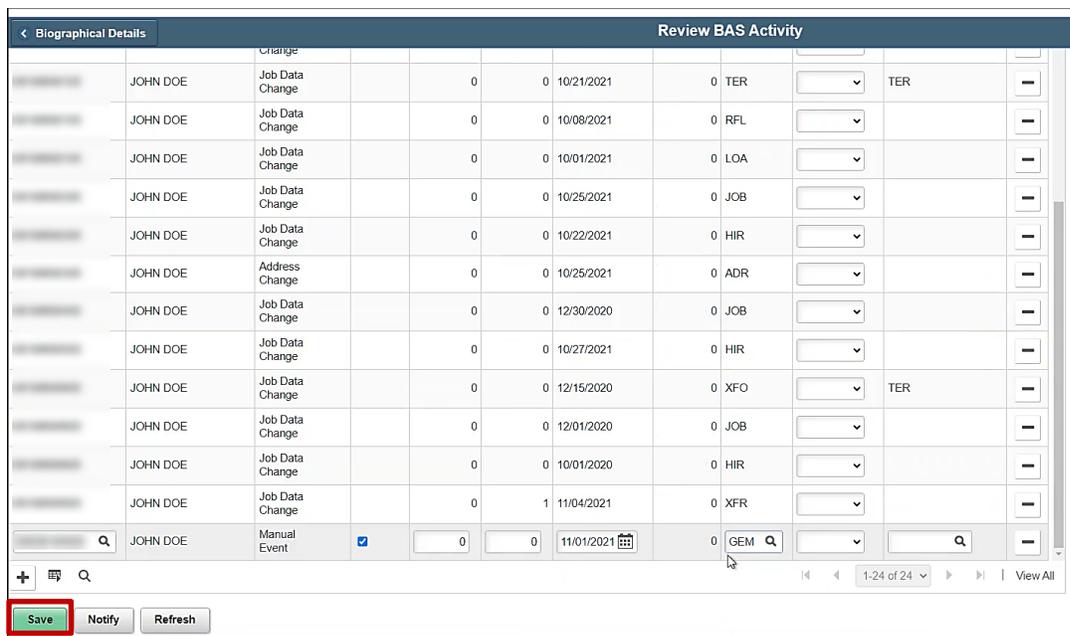
The **Review BAS Activity** page refreshes.



*Empl ID*	Name	*Action Source*	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action
	JOHN DOE	Address Change			0	0	09/02/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	09/08/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	11/10/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	11/20/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	11/20/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	11/23/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	11/23/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	11/23/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	11/23/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	12/01/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	12/01/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	12/01/2020	0 ADR		--
	JOHN DOE	Address Change			0	0	12/04/2020	0 ADR		--
<input type="text"/>		Manual Event	<input checked="" type="checkbox"/>		<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="11/01/2021"/>	0 GEM	<input type="text"/>	<input type="text"/>

3. Enter the **Empl ID** in the first box to the left.
4. Enter the **Effective date** of the event in the date field (Same date as the Medicare Information Update).
5. Click on the magnifying glass in the **BAS Action** section and select the **GEM** event (Gained Eligibility for Medicare).

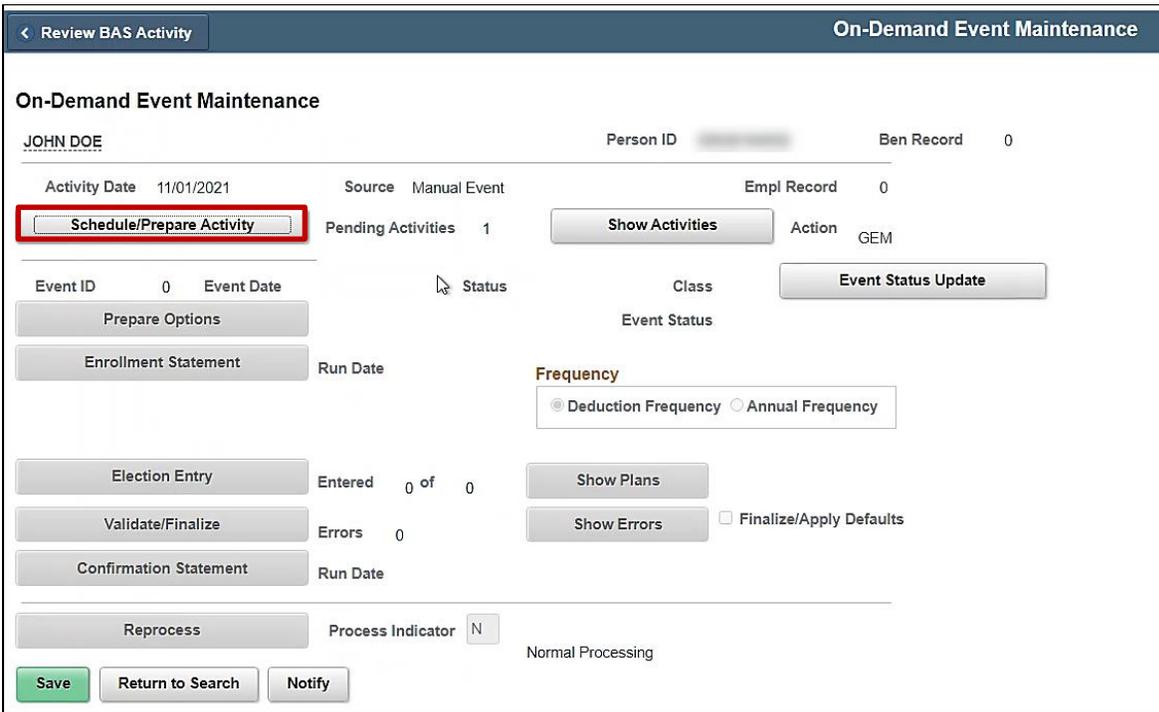
The **BAS Activity** displays with the information in the new row.



*Empl ID*	Name	*Action Source*	All Jobs	Ben Record	Empl Record	*Event Date*	Event Effseq	*BAS Action*	Suppress Forms	COBRA Action
	JOHN DOE	Job Data Change			0	0	10/21/2021	0 TER		TER
	JOHN DOE	Job Data Change			0	0	10/08/2021	0 RFL		--
	JOHN DOE	Job Data Change			0	0	10/01/2021	0 LOA		--
	JOHN DOE	Job Data Change			0	0	10/25/2021	0 JOB		--
	JOHN DOE	Job Data Change			0	0	10/22/2021	0 HIR		--
	JOHN DOE	Address Change			0	0	10/25/2021	0 ADR		--
	JOHN DOE	Job Data Change			0	0	12/30/2020	0 JOB		--
	JOHN DOE	Job Data Change			0	0	10/27/2021	0 HIR		--
	JOHN DOE	Job Data Change			0	0	12/15/2020	0 XFO		TER
	JOHN DOE	Job Data Change			0	0	12/01/2020	0 JOB		--
	JOHN DOE	Job Data Change			0	0	10/01/2020	0 HIR		--
	JOHN DOE	Job Data Change			0	1	11/04/2021	0 XFR		--
<input type="text"/>	JOHN DOE	Manual Event	<input checked="" type="checkbox"/>		<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="11/01/2021"/>	0 GEM	<input type="text"/>	<input type="text"/>

6. Click **Save**.
7. Navigate to the **On-Demand Event Maintenance** page using the following path:  
**Benefit Administrator tile > Manage Automated Enrollment > On-Demand Event Maintenance**

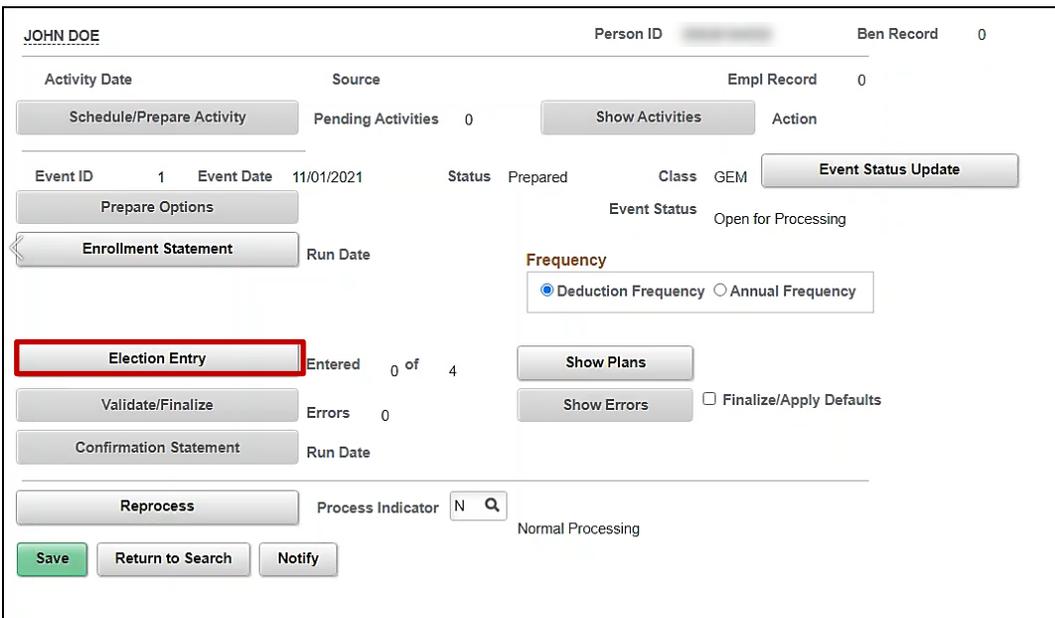
The **On-Demand Event Maintenance** page displays.



The screenshot shows the 'On-Demand Event Maintenance' page for 'JOHN DOE'. The page includes a navigation bar with a back arrow and 'Review BAS Activity' link, and a title 'On-Demand Event Maintenance'. Below the header, the user's name 'JOHN DOE' is displayed, along with 'Person ID' (blurred) and 'Ben Record 0'. The 'Activity Date' is '11/01/2021' and the 'Source' is 'Manual Event'. There are buttons for 'Schedule/Prepare Activity' (highlighted with a red box), 'Show Activities', and 'Event Status Update'. The 'Pending Activities' count is '1'. Below this, there are sections for 'Event ID 0', 'Event Date', 'Status', 'Class', and 'Event Status'. There are also buttons for 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', and 'Confirmation Statement'. The 'Frequency' section has radio buttons for 'Deduction Frequency' (selected) and 'Annual Frequency'. The 'Entered' count is '0 of 0', and the 'Errors' count is '0'. There are buttons for 'Show Plans', 'Show Errors', and 'Finalize/Apply Defaults'. The 'Reprocess' button is also visible, along with a 'Process Indicator' set to 'N' and the text 'Normal Processing'. At the bottom, there are buttons for 'Save', 'Return to Search', and 'Notify'.

8. Click on the **Schedule/Prepare Activity** button.

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



JOHN DOE Person ID [REDACTED] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 11/01/2021 Status Prepared Class GEM Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency  Annual Frequency

**Election Entry** Entered 0 of 4 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

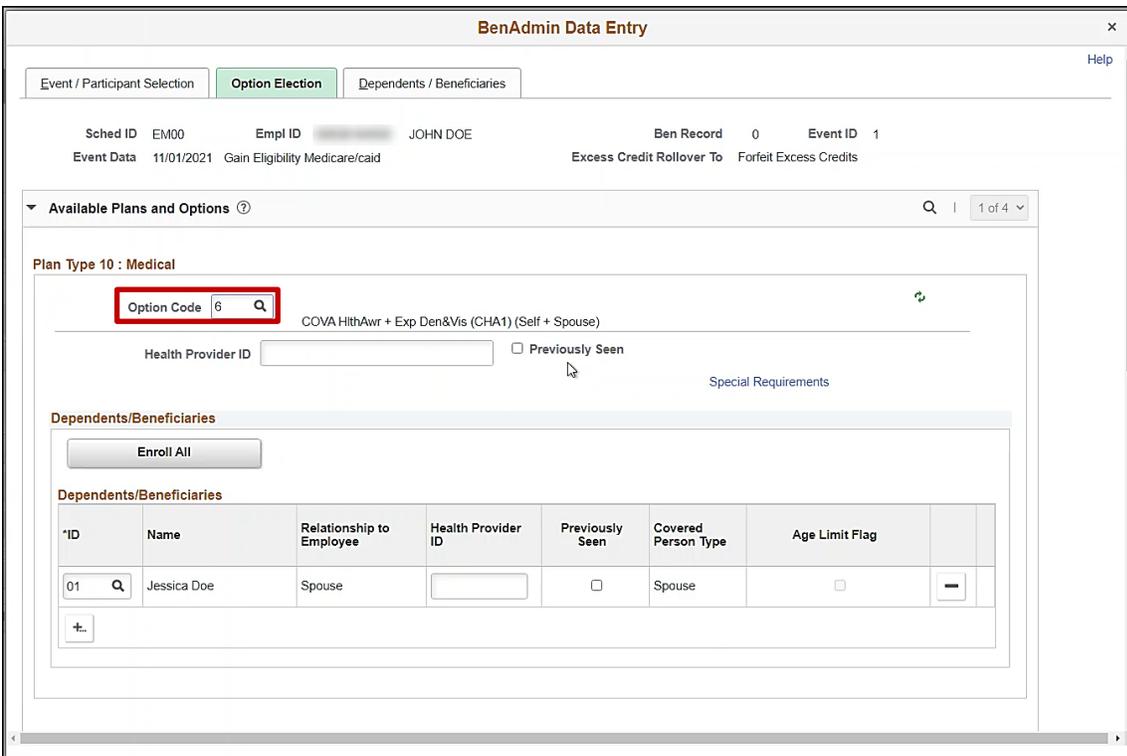
Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify

9. Click on the **Election Entry** button.

The **BenAdmin Data Entry** page displays.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] JOHN DOE Ben Record 0 Event ID 1

Event Data 11/01/2021 Gain Eligibility Medicare/caid Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 4

Plan Type 10 : Medical

Option Code 6 COVA HlthAwr + Exp Den&Vis (CHA1) (Self + Spouse)

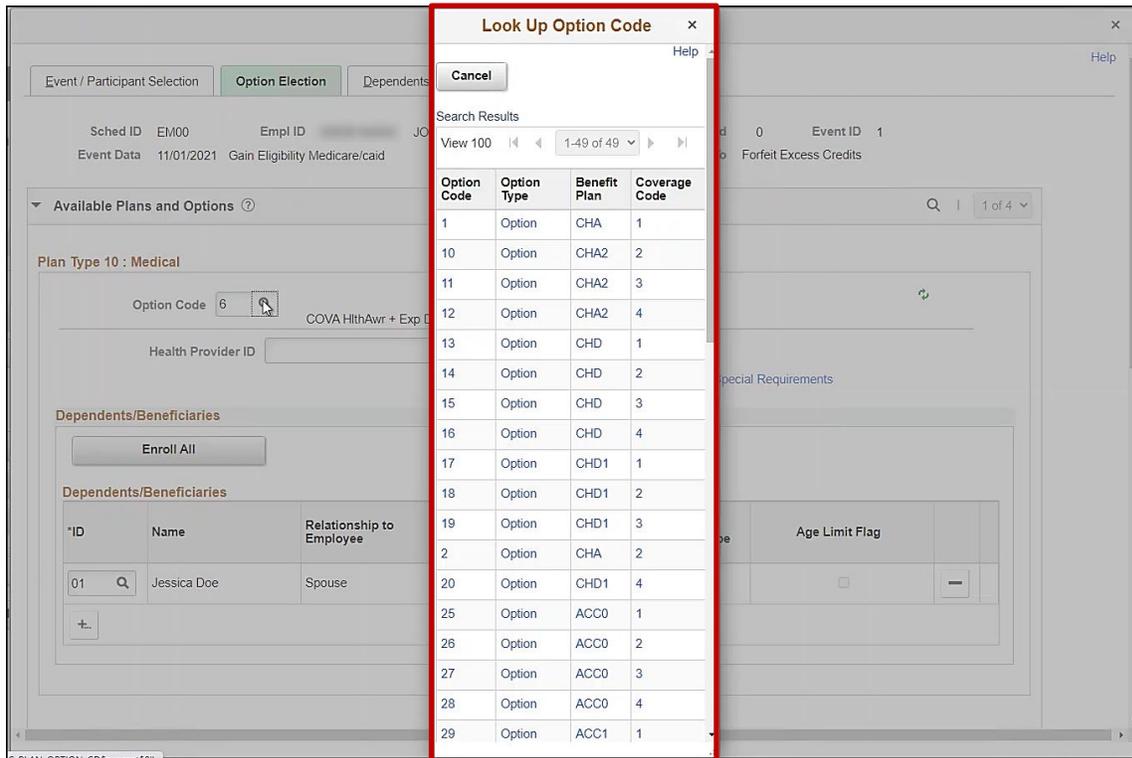
Health Provider ID   Previously Seen Special Requirements

Enroll All

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Jessica Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>

10. Click on the magnifying glass under **Plan Type 10: Medical**.



**Look Up Option Code**

Cancel Help

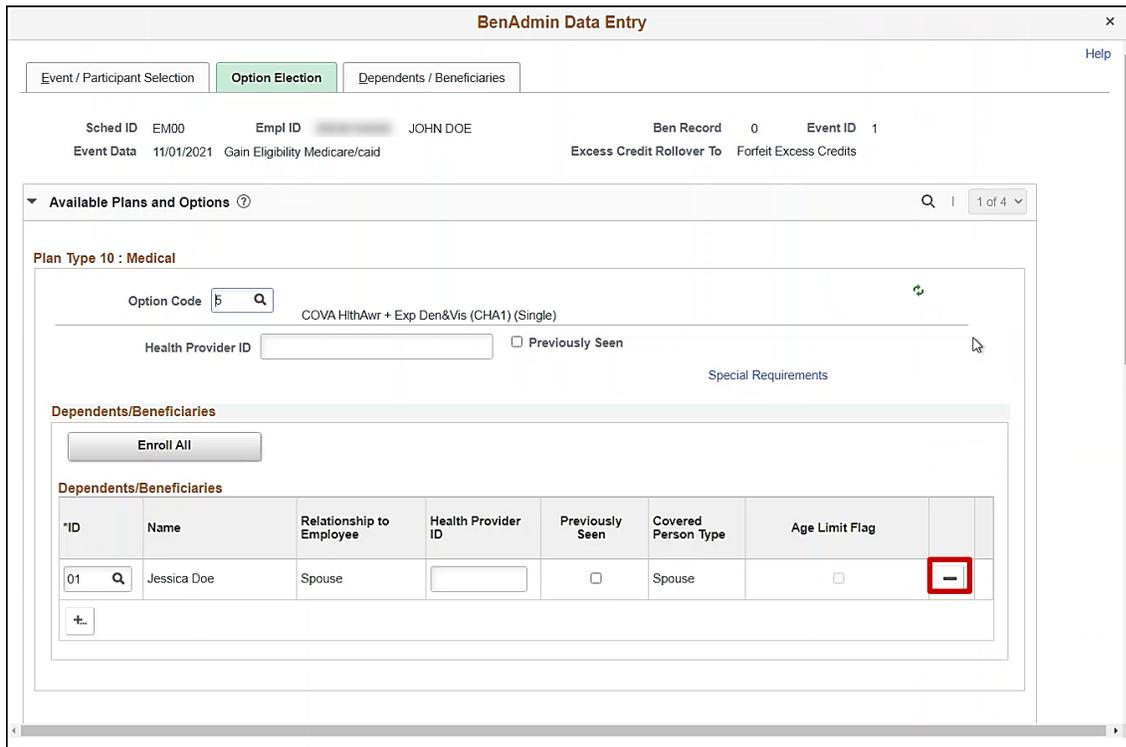
Search Results

View 100 | 1-49 of 49

Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1
18	Option	CHD1	2
19	Option	CHD1	3
2	Option	CHA	2
20	Option	CHD1	4
25	Option	ACC0	1
26	Option	ACC0	2
27	Option	ACC0	3
28	Option	ACC0	4
29	Option	ACC1	1

11. Click on the Medical Plan with **Coverage Code 1 (Single)**.

The **BenAdmin Data Entry** page returns.



**BenAdmin Data Entry**

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

Sched ID EM00 | Empl ID JOHN DOE | Ben Record 0 | Event ID 1

Event Data 11/01/2021 | Gain Eligibility Medicare/caid | Excess Credit Rollover To | Forfeit Excess Credits

**Available Plans and Options**

Plan Type 10 : Medical

Option Code 5 | COVA HlthAwr + Exp Den&Vis (CHA1) (Single)

Health Provider ID |  Previously Seen

Special Requirements

**Dependents/Beneficiaries**

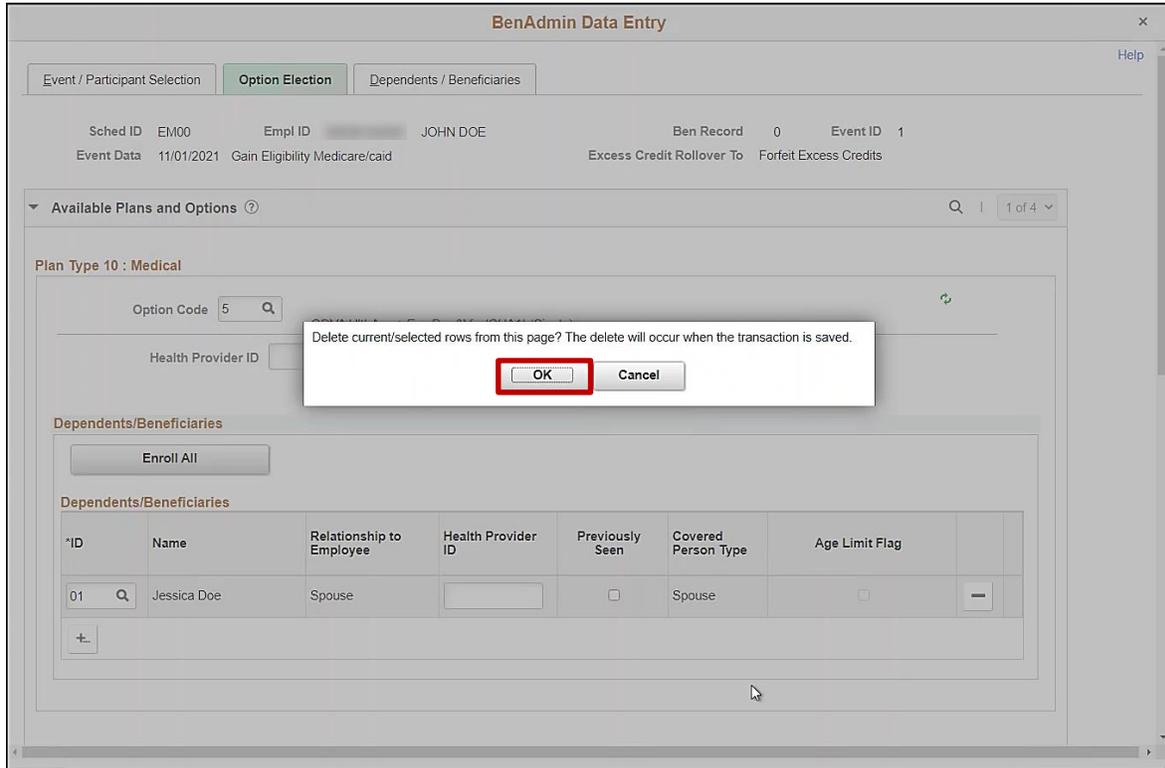
Enroll All

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Jessica Doe	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/> -

**BN361 Employee Set Up for Medicare**

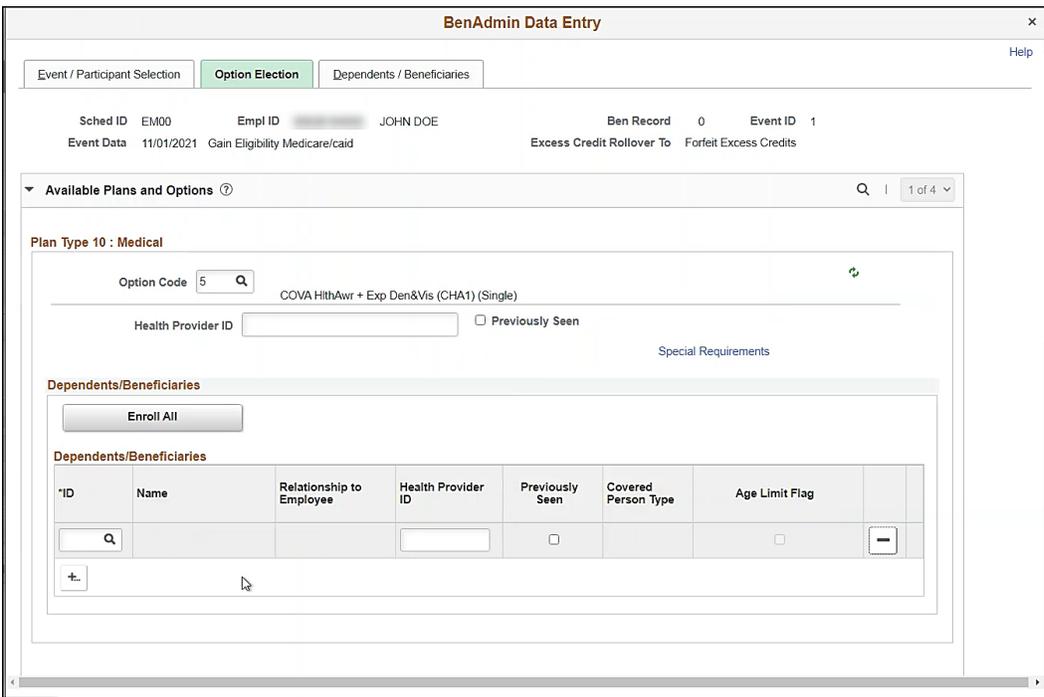
**Note:** Before removing the listed dependent, make sure to record all the personal information for the new hire process. (e.g., Date of Birth, Full Name, Address, etc.)

- Click on the “ - ” sign next to the listed dependent under the **Dependent/Beneficiaries**.



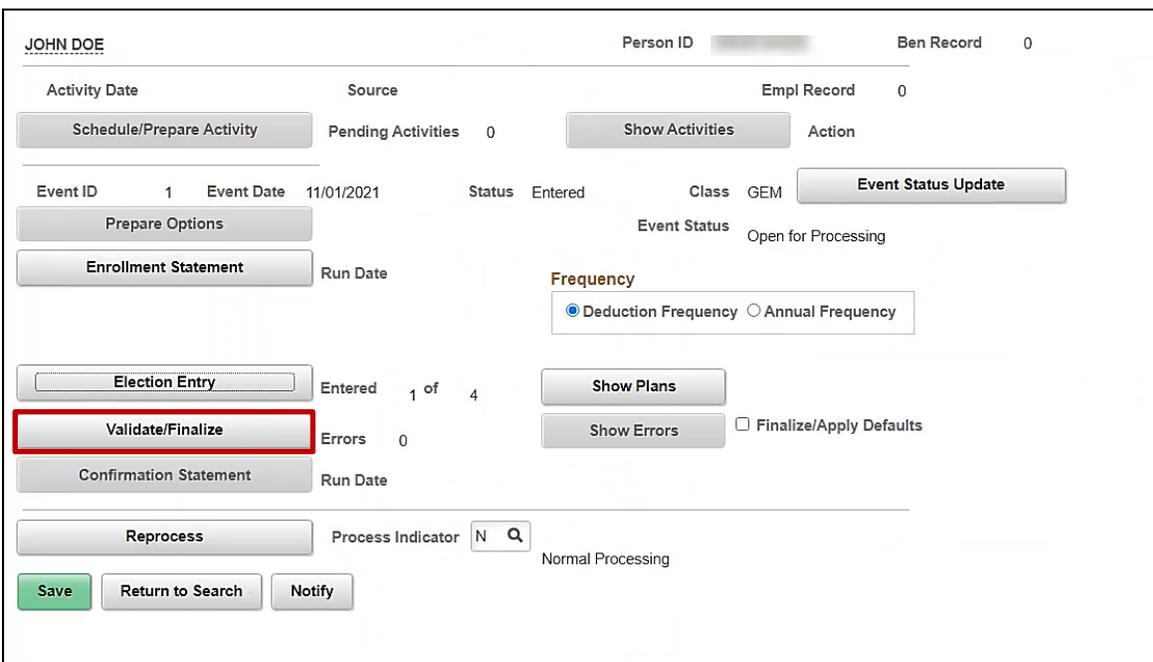
- Click **Ok**.

The **BenAdmin Data Entry** page returns with no listed dependents under **Dependents/Beneficiaries**.



14. Scroll down to the bottom of the page and click **OK**.

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



15. Click on the **Validate/Finalize** button.

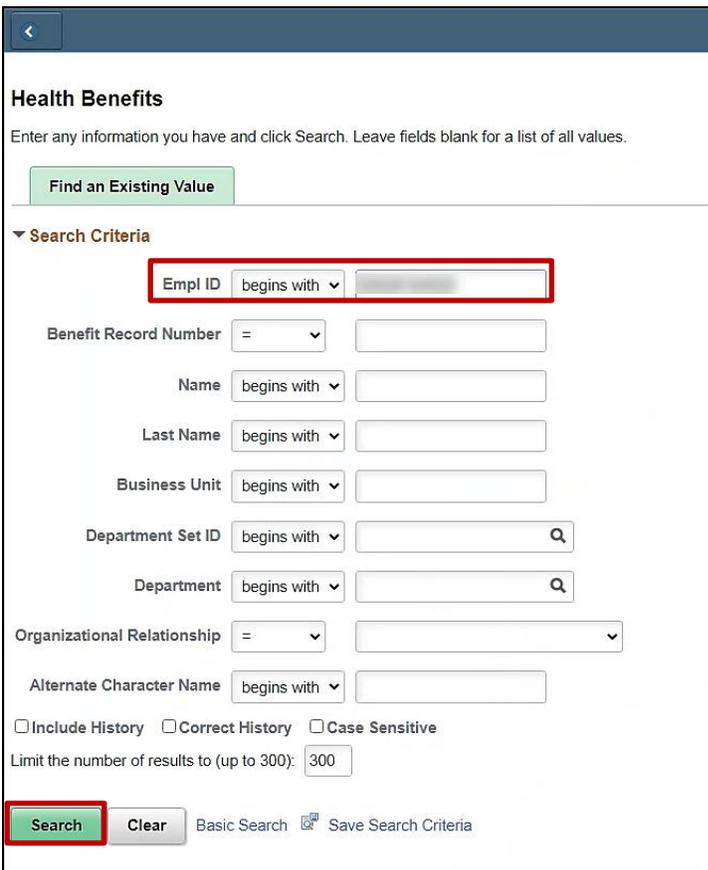
The **On-Demand Event Maintenance** page refreshes.

<u>JOHN DOE</u>		Person ID	[REDACTED]		Ben Record	0
Activity Date	Source	Empl Record		0		
<input type="button" value="Schedule/Prepare Activity"/>		Pending Activities	0	<input type="button" value="Show Activities"/>		Action
Event ID	1	Event Date	11/01/2021	Status	Finalized - Enrolled	Class GEM
<input type="button" value="Prepare Options"/>		Event Status		Closed to Processing		
<input type="button" value="Enrollment Statement"/>		Run Date	<b>Frequency</b> <input checked="" type="radio"/> Deduction Frequency <input type="radio"/> Annual Frequency			
<input type="button" value="Election Entry"/>		Entered	0 of 0	<input type="button" value="Show Plans"/>		
<input type="button" value="Validate/Finalize"/>		Errors	0	<input type="button" value="Show Errors"/> <input type="checkbox"/> Finalize/Apply Defaults		
<input type="button" value="Confirmation Statement"/>		Run Date				
<input type="button" value="Reprocess"/>		Process Indicator	N	Normal Processing		
<input type="button" value="Save"/>	<input type="button" value="Return to Search"/>	<input type="button" value="Notify"/>				

- Navigate to the **Health Benefits** page to confirm the current benefit enrollment for the employee by using the following path:

**Navigator > Enroll in Benefits > Health Benefits**

The **Health Benefits** search page displays.



**Health Benefits**

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

**Search Criteria**

Empl ID begins with [ ]

Benefit Record Number = [ ]

Name begins with [ ]

Last Name begins with [ ]

Business Unit begins with [ ]

Department Set ID begins with [ ]

Department begins with [ ]

Organizational Relationship = [ ]

Alternate Character Name begins with [ ]

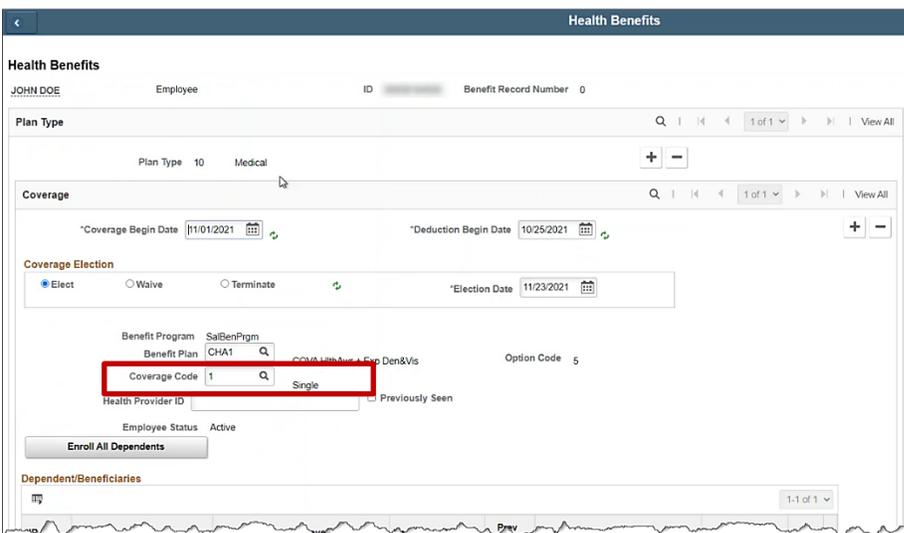
Include History  Correct History  Case Sensitive

Limit the number of results to (up to 300): [ 300 ]

**Search** **Clear** Basic Search  Save Search Criteria

17. Enter the **Employee ID**.

The **Health Benefits** page displays.



**Health Benefits**

JOHN.DOE Employee ID [ ] Benefit Record Number 0

**Plan Type** Plan Type 10 Medical

**Coverage** Coverage Begin Date 11/01/2021 Deduction Begin Date 10/25/2021

**Coverage Election**  Elect  Waive  Terminate Election Date 11/23/2021

Benefit Program SaBenPrgm  
Benefit Plan CHA1 Coverage Code 1 Single  
Health Provider ID [ ]

Employee Status Active

**Enroll All Dependents**

**Dependent/Beneficiaries**

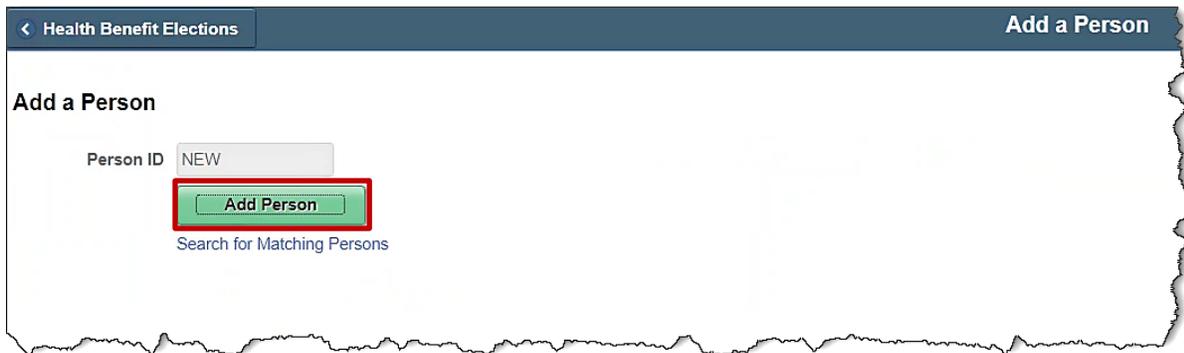
18. Confirm the **Benefit Plans Coverage Code** is **Single**.

## Hire the Spouse as an Employee

Now that the employee's benefit election has been updated to Single, the Agency BA must now hire the Spouse as an employee into Cardinal.

1. Navigate to the **Add a Person** page through the following path:

**Navigator > Workforce Administration > Personal Information > Add Person**



Health Benefit Elections Add a Person

**Add a Person**

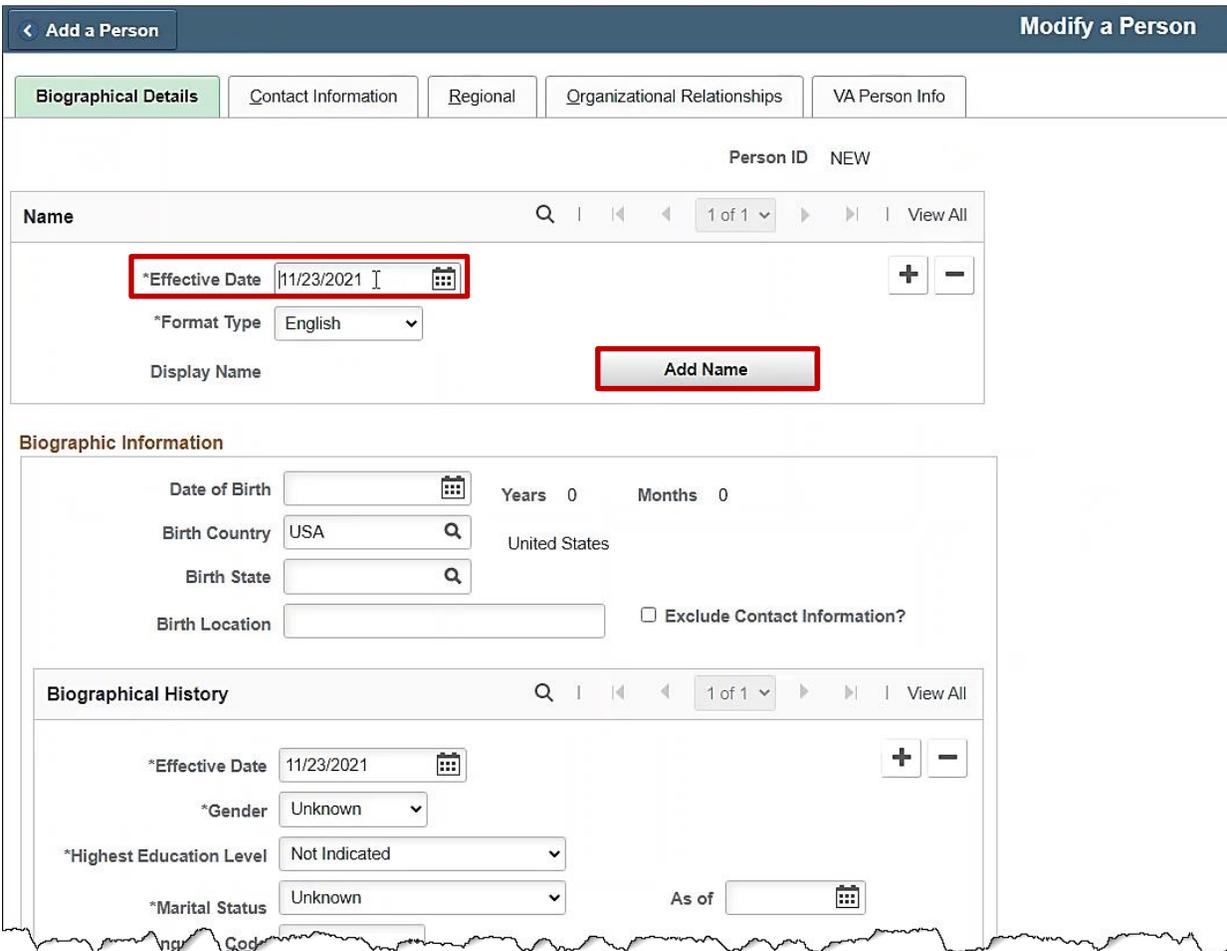
Person ID NEW

**Add Person**

Search for Matching Persons

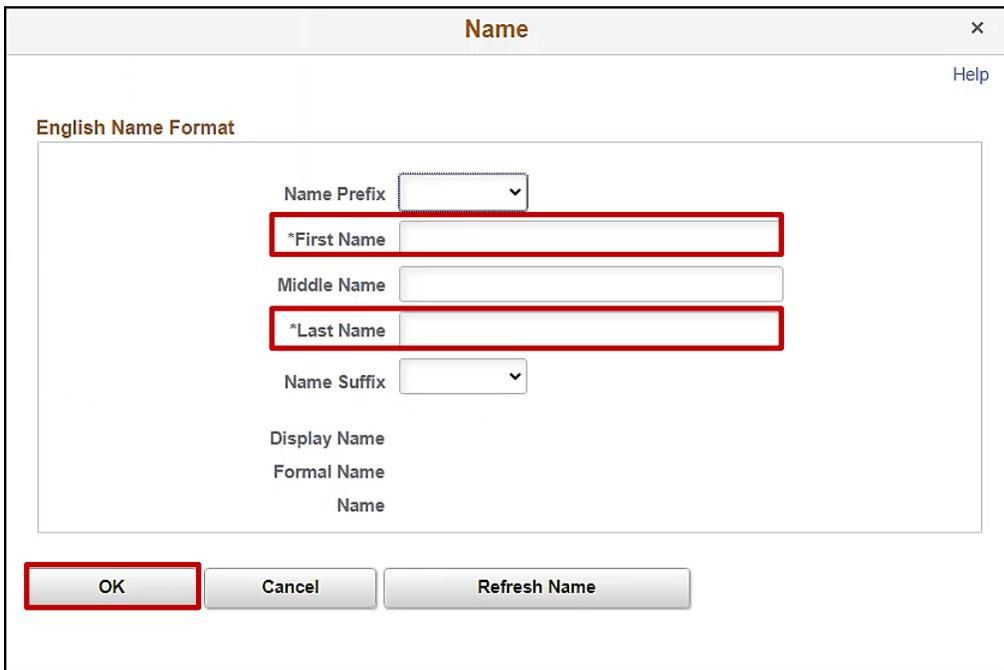
2. Click on **Add Person** button.

The **Modify a Person** page displays.



3. Enter the **Effective Date** (This is the first of the month in which the Spouse turns 65 to be eligible for Medicare).
4. Click **Add Name**.

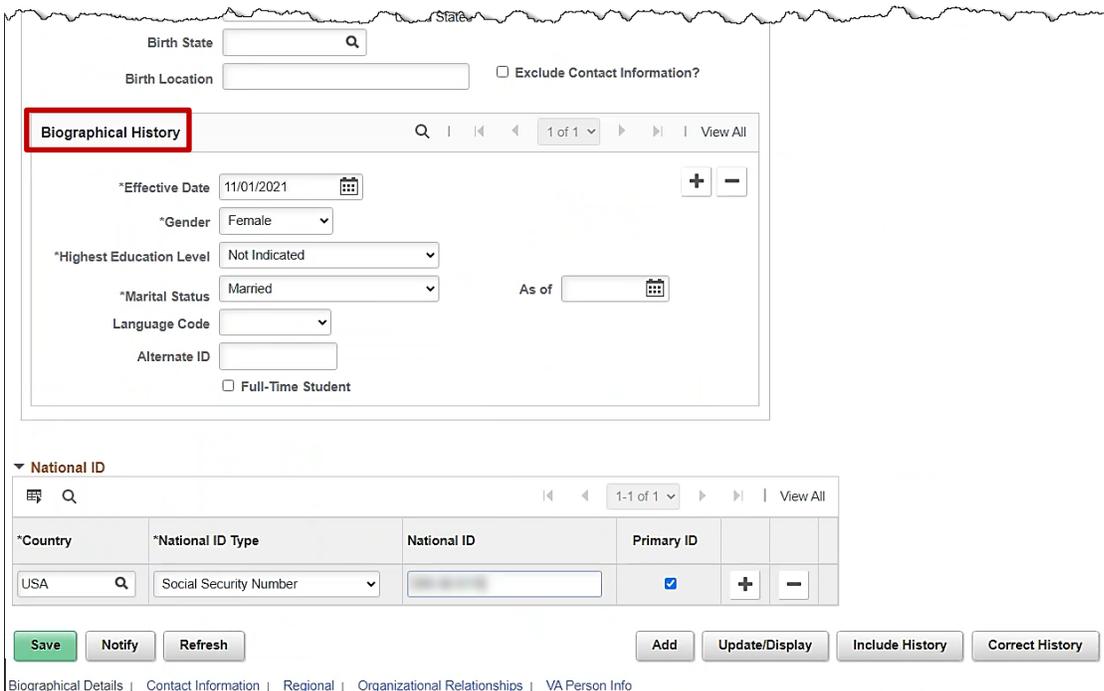
The **Name** pop-up window displays.



5. Enter the **First Name** and **Last Name**.

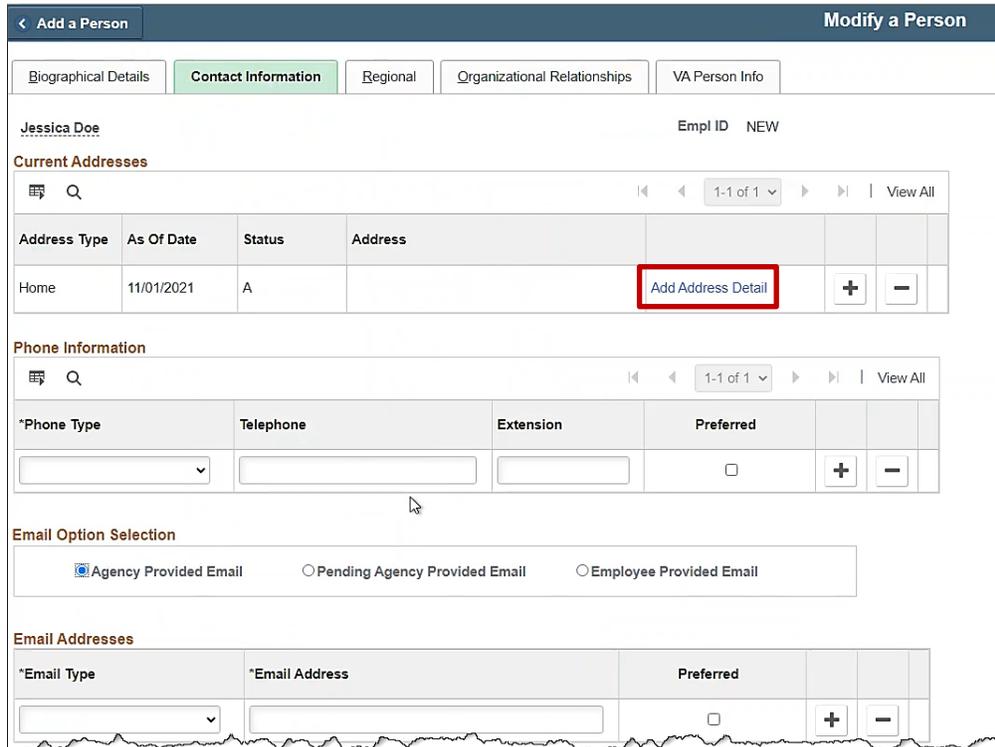
6. Click **OK**.

The **Modify a Person** page returns.



7. Enter the **Date of Birth, Gender, Highest Education Level, Marital Status** and **National ID**.
8. Click on the **Contact Information** tab.

The **Contact Information** tab displays.



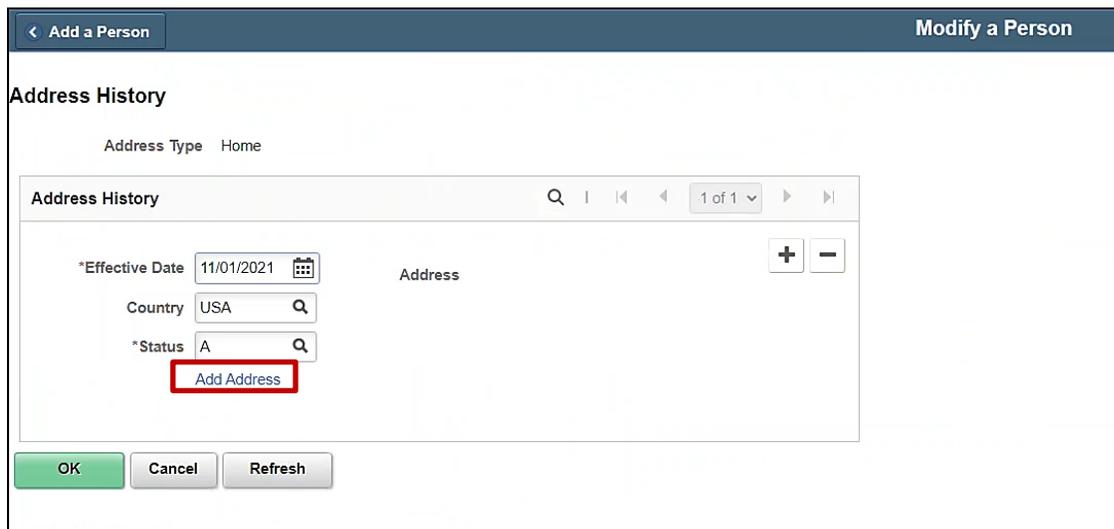
The screenshot shows the 'Contact Information' tab for a person named Jessica Doe. The 'Current Addresses' section contains a table with one entry:

Address Type	As Of Date	Status	Address		
Home	11/01/2021	A		<a href="#">Add Address Detail</a>	+ -

The 'Add Address Detail' link is highlighted with a red box. Below this, there are sections for 'Phone Information' and 'Email Option Selection'.

9. Click on the **Add Address Detail** hyperlink.

The **Address History** page displays.



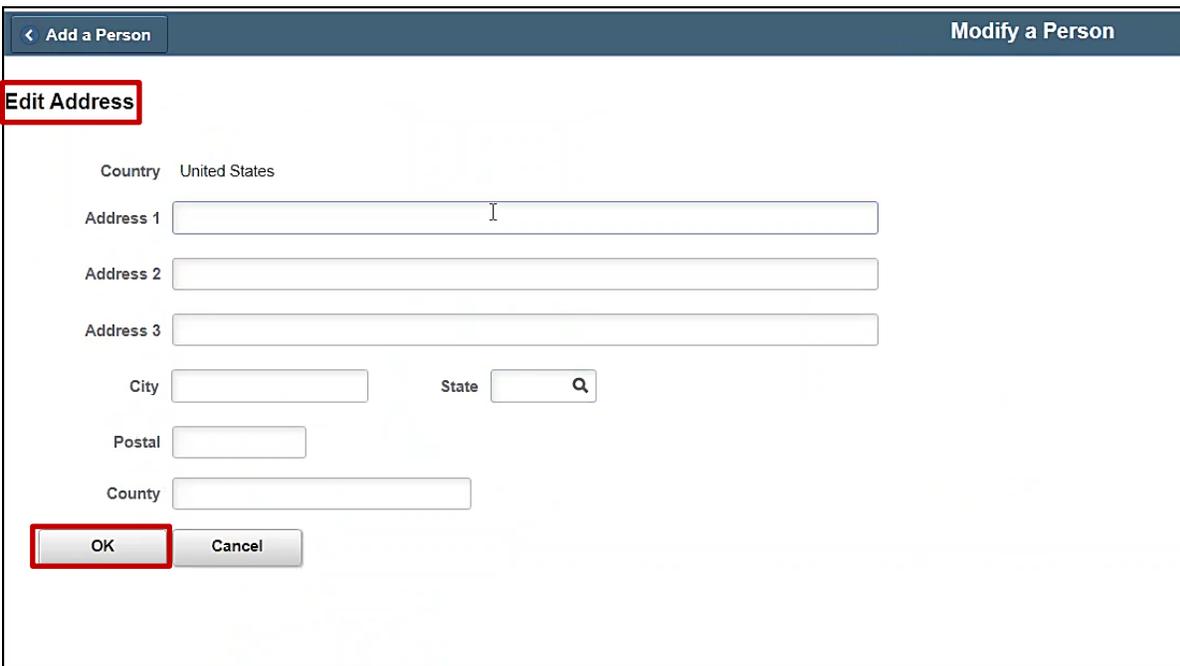
The screenshot shows the 'Address History' page for a person named Jessica Doe. The 'Address History' section contains a form with the following fields:

- \*Effective Date: 11/01/2021
- Country: USA
- \*Status: A

The 'Add Address' link is highlighted with a red box. At the bottom of the form, there are buttons for 'OK', 'Cancel', and 'Refresh'.

10. Click on the **Add Address** hyperlink.

The **Edit Address** page displays.

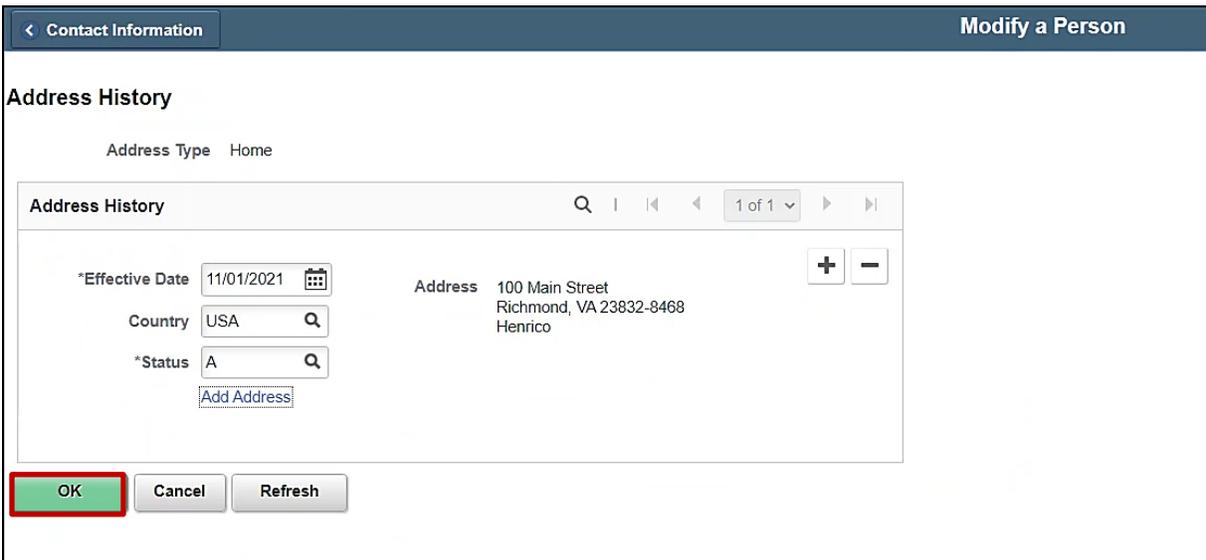


The screenshot shows the 'Edit Address' form within a 'Modify a Person' interface. The form includes fields for Country (United States), Address 1, Address 2, Address 3, City, State (with a search icon), Postal, and County. The 'OK' button is highlighted with a red box.

11. Enter the **Address**.

12. Click **OK**.

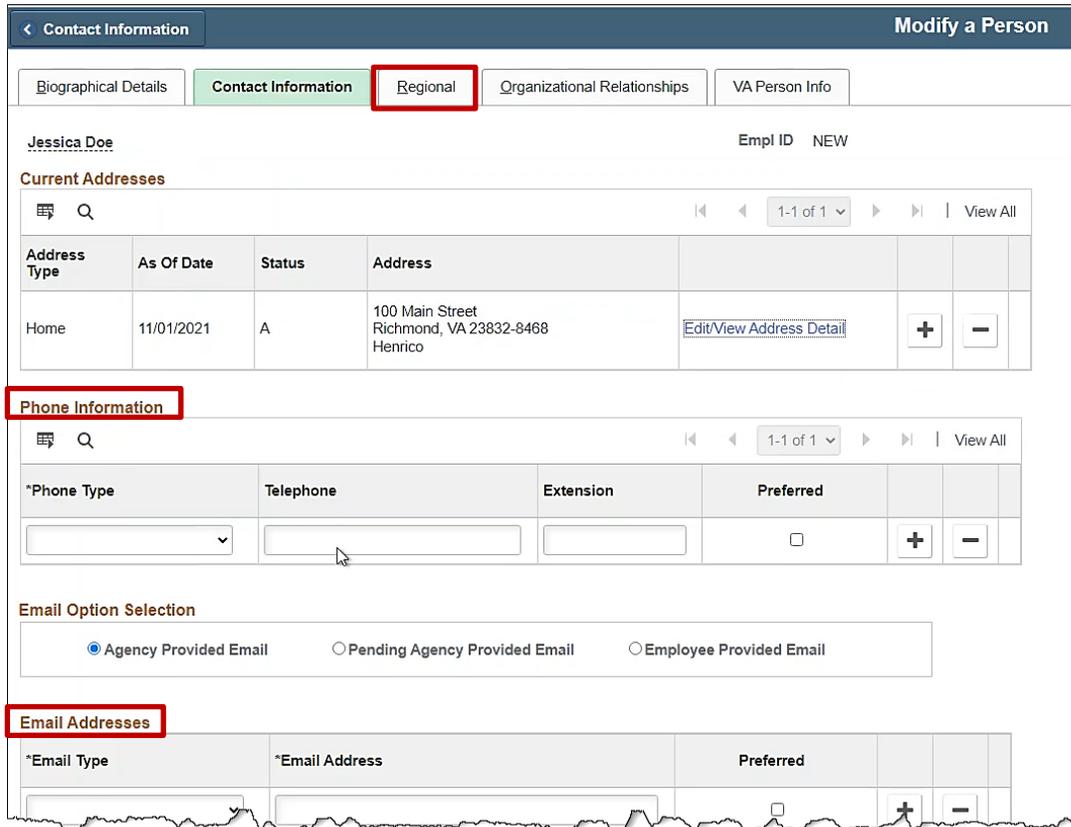
The **Address History** page returns.



The screenshot shows the 'Address History' page within a 'Modify a Person' interface. It displays a table with one address entry: \*Effective Date: 11/01/2021, Country: USA, \*Status: A, and Address: 100 Main Street, Richmond, VA 23832-8468, Henrico. The 'OK' button is highlighted with a red box.

13. Click **OK**.

The **Contact Information** page returns.



**Modify a Person**

< Contact Information **Contact Information** **Regional** Organizational Relationships VA Person Info

Jessica Doe Empl ID NEW

**Current Addresses**

1-1 of 1 | View All

Address Type	As Of Date	Status	Address		
Home	11/01/2021	A	100 Main Street Richmond, VA 23832-8468 Henrico	<a href="#">Edit/View Address Detail</a>	+ -

**Phone Information**

1-1 of 1 | View All

*Phone Type	Telephone	Extension	Preferred		
			<input type="checkbox"/>	+ -	

**Email Option Selection**

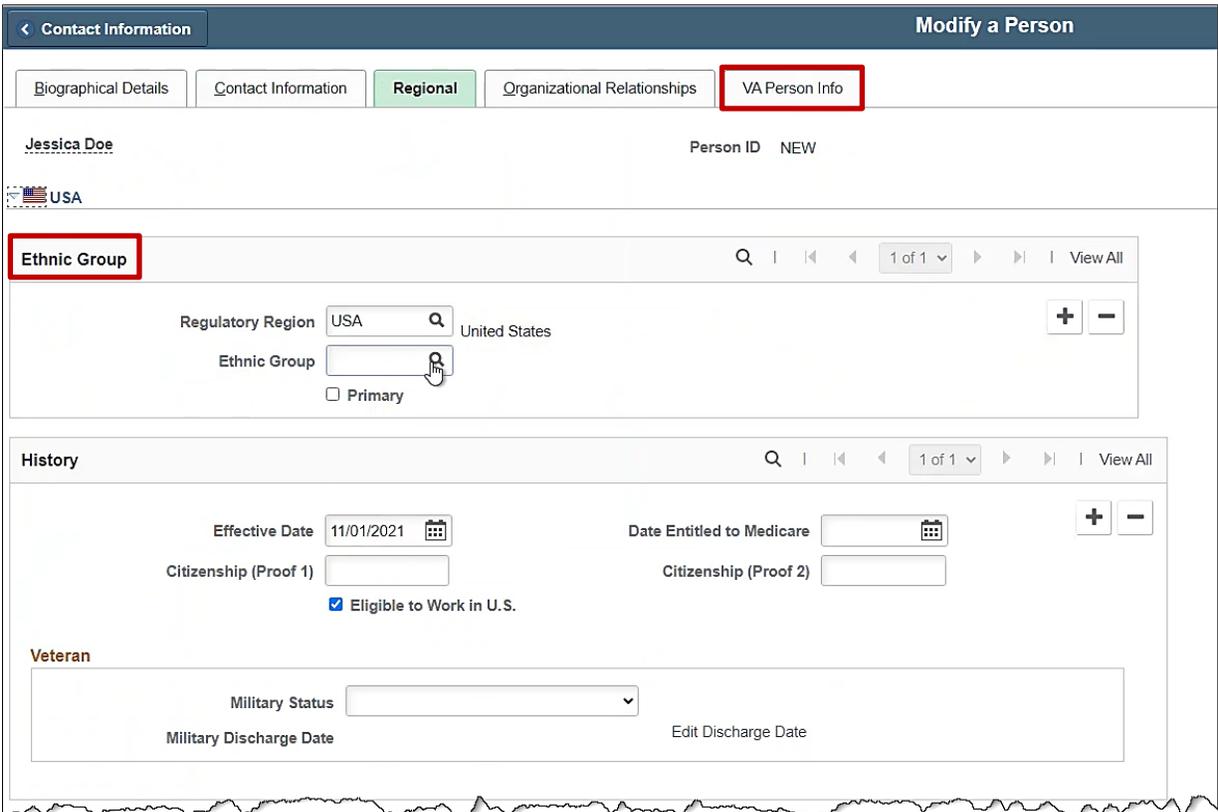
Agency Provided Email
  Pending Agency Provided Email
  Employee Provided Email

**Email Addresses**

*Email Type	*Email Address	Preferred		
		<input type="checkbox"/>	+ -	

14. If there is any other additional information for the Spouse, enter it on the **Contact Information** tab. (e.g., Phone Number, Email Address, etc.)
15. Click on the **Regional** tab.

The **Regional** page displays.



**Modify a Person**

Biographical Details | Contact Information | **Regional** | Organizational Relationships | VA Person Info

Jessica Doe Person ID NEW

USA

**Ethnic Group** [magnifying glass icon] 1 of 1 | View All

Regulatory Region: USA United States [+ -]

Ethnic Group: [dropdown menu] [magnifying glass icon]

Primary

**History** 1 of 1 | View All

Effective Date: 11/01/2021 Date Entitled to Medicare: [calendar icon] [+ -]

Citizenship (Proof 1): [text field] Citizenship (Proof 2): [text field]

Eligible to Work in U.S.

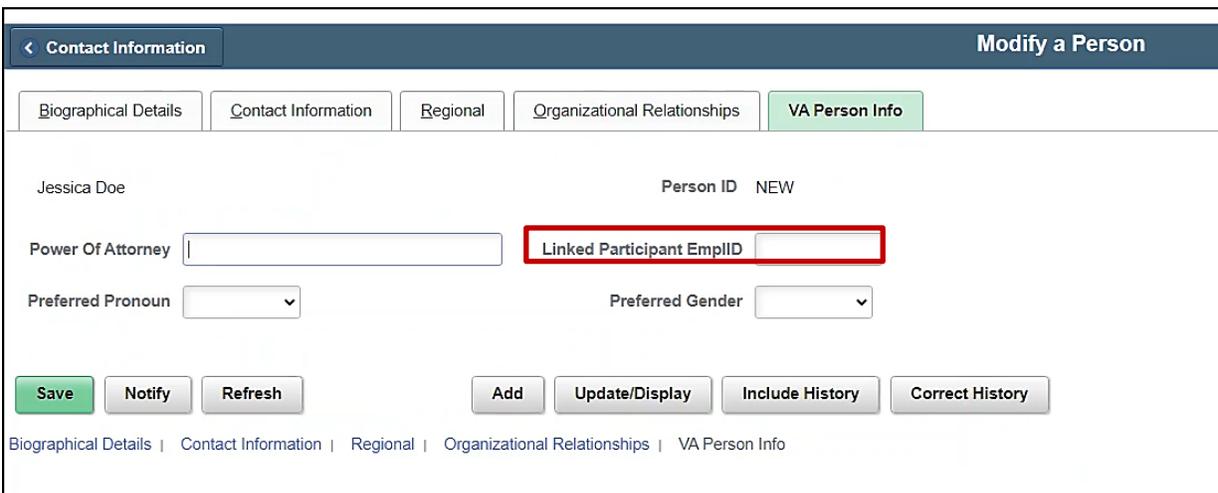
**Veteran**

Military Status: [dropdown menu] Edit Discharge Date: [text field]

16. Click on the magnifying glass next to **Ethnic Group** and select the corresponding one for the Spouse.

17. Click on the **VA Person Info** tab.

The **VA Person Info** tab displays.



**Modify a Person**

Biographical Details | Contact Information | Regional | Organizational Relationships | **VA Person Info**

Jessica Doe Person ID NEW

Power Of Attorney: [text field] **Linked Participant EmplID**: [text field]

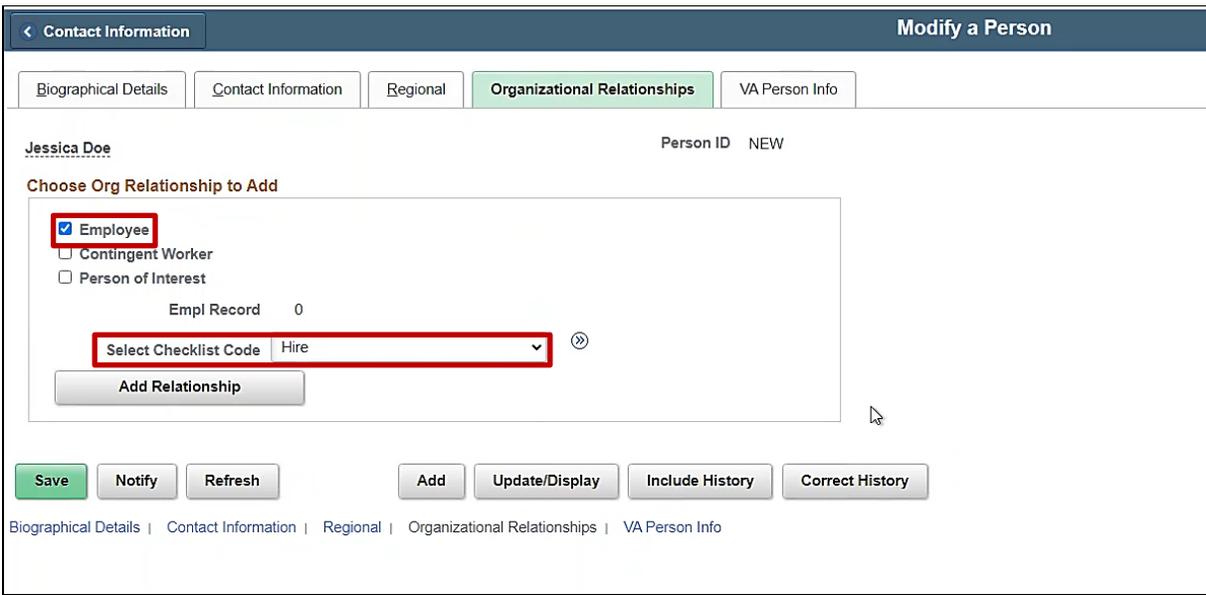
Preferred Pronoun: [dropdown menu] Preferred Gender: [dropdown menu]

**Save** **Notify** **Refresh** **Add** **Update/Display** **Include History** **Correct History**

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info

18. Enter the **Employee ID** of the employee whose spouse is receiving Medicare, in the **Linked Participant EmplID** field.
19. Click the **Organizational Relationships** tab.

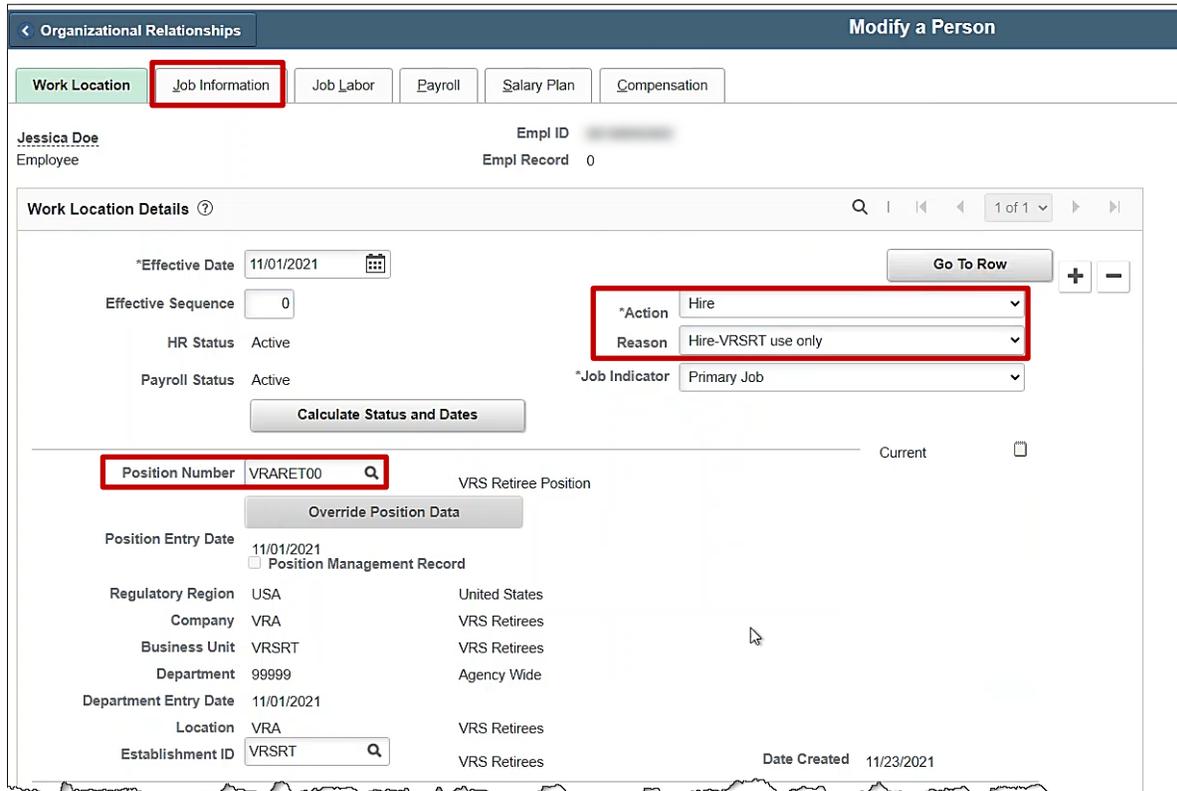
The **Organizational Relationships** tab displays.



The screenshot shows the 'Organizational Relationships' tab for a person named Jessica Doe. The interface includes a header with a back arrow and 'Contact Information', and a title bar with 'Modify a Person'. Below the header are tabs for 'Biographical Details', 'Contact Information', 'Regional', 'Organizational Relationships' (which is active), and 'VA Person Info'. The main content area shows the person's name 'Jessica Doe' and 'Person ID NEW'. A section titled 'Choose Org Relationship to Add' contains three radio button options: 'Employee' (checked), 'Contingent Worker', and 'Person of Interest'. Below these is a label 'Empl Record' with the value '0'. A dropdown menu labeled 'Select Checklist Code' is set to 'Hire'. An 'Add Relationship' button is located below the dropdown. At the bottom of the form are buttons for 'Save', 'Notify', 'Refresh', 'Add', 'Update/Display', 'Include History', and 'Correct History'. A breadcrumb trail at the very bottom reads: 'Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info'.

20. Check the box next to **Employee**.
21. Click on the drop-down arrow next to **Select Checklist Code** and select **Hire**.
22. Click on **Add Relationship** button.

The **Work Location** tab displays.



**Organizational Relationships** Modify a Person

**Work Location** | Job Information | Job Labor | Payroll | Salary Plan | Compensation

Jessica Doe  
Employee      Empl ID [REDACTED]  
Empl Record 0

**Work Location Details** 1 of 1

\*Effective Date: 11/01/2021 Go To Row

Effective Sequence: 0

HR Status: Active

Payroll Status: Active

\*Action: Hire

Reason: Hire-VRSRT use only

\*Job Indicator: Primary Job

Calculate Status and Dates

Position Number: VRARET00 Current

Override Position Data

Position Entry Date: 11/01/2021  Position Management Record

Regulatory Region: USA United States

Company: VRA VRS Retirees

Business Unit: VRSRT VRS Retirees

Department: 99999 Agency Wide

Department Entry Date: 11/01/2021

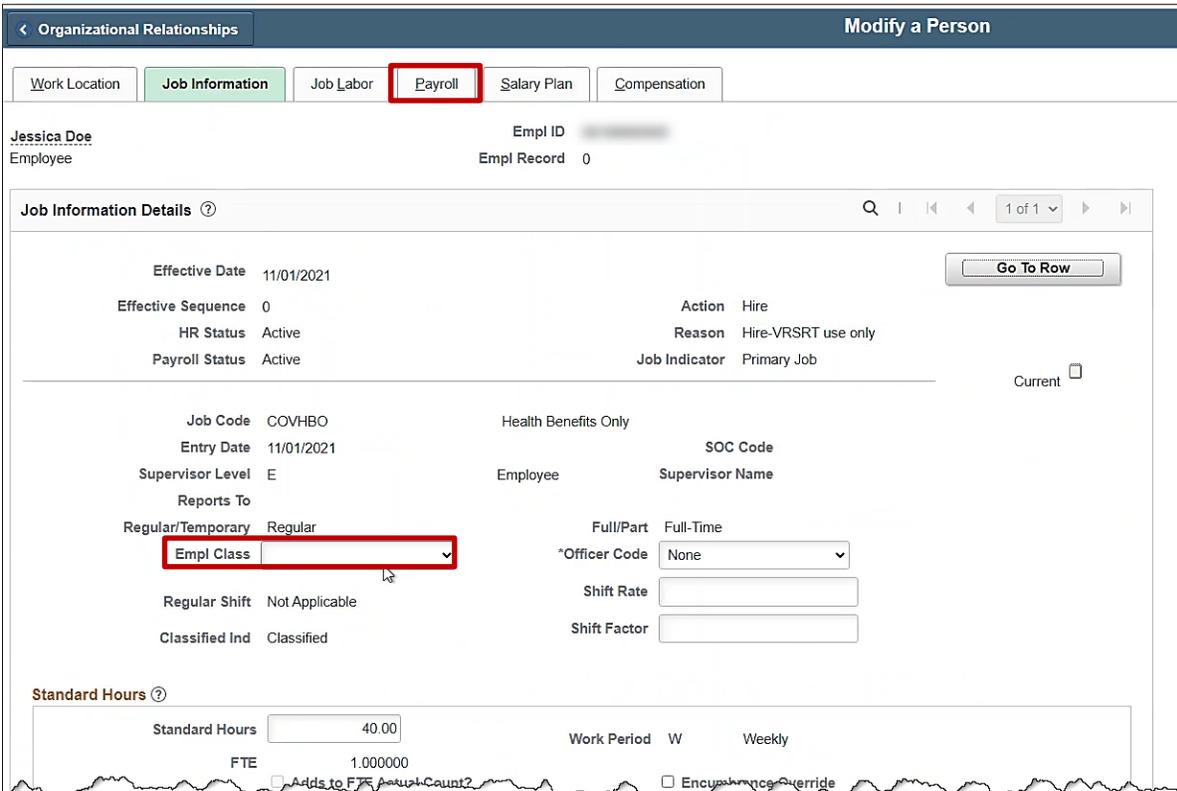
Location: VRA VRS Retirees

Establishment ID: VRSRT VRS Retirees

Date Created: 11/23/2021

23. Select **Hire** from the drop-down menu next to **Action**.
24. Select **Hire-VRSRT use only** from the drop-down menu next to **Reason**.
25. Click on the magnifying glass next to **Position Number** and select the **VRS Retiree Position** number.
26. Click on **Job Information** tab.

The **Job Information** tab displays.

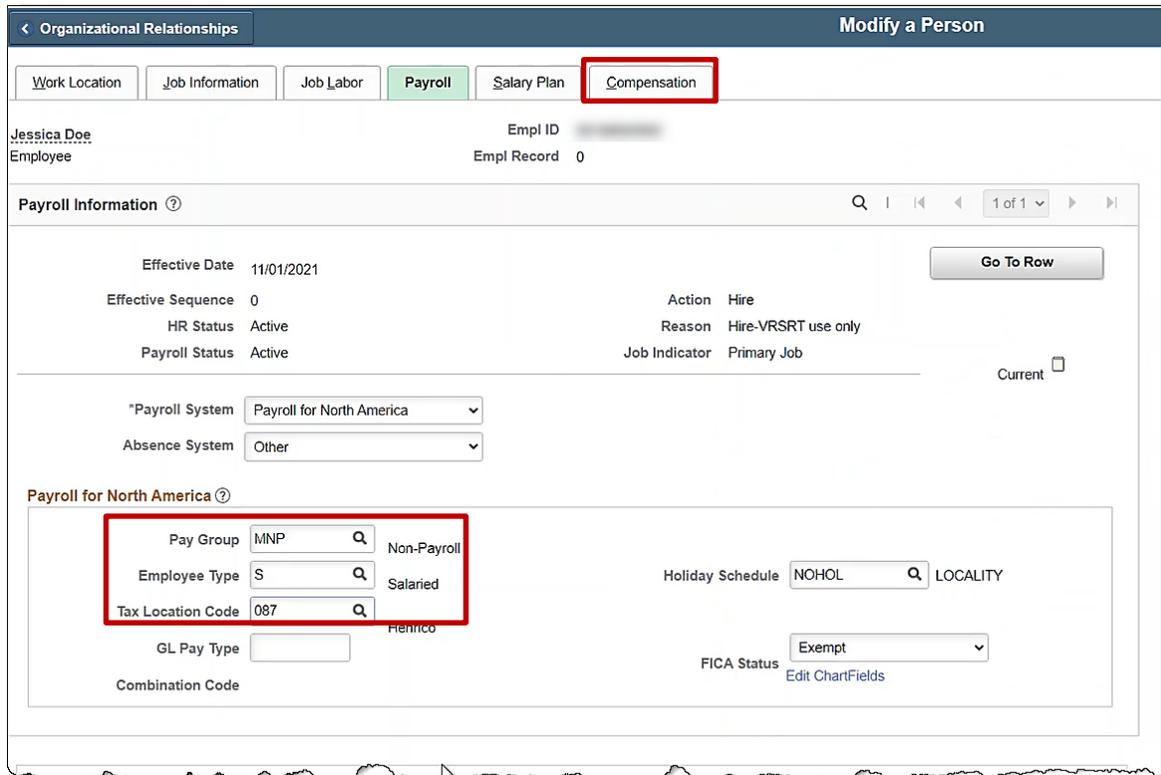


The screenshot shows the 'Modify a Person' interface for Jessica Doe. The 'Job Information' tab is active, and the 'Payroll' tab is highlighted with a red box. The 'Empl Class' dropdown menu is also highlighted with a red box. The interface displays various fields for job information, including Effective Date, HR Status, Payroll Status, Job Code, Entry Date, Supervisor Level, Regular/Temporary status, and Standard Hours.

Field	Value
Effective Date	11/01/2021
Effective Sequence	0
HR Status	Active
Payroll Status	Active
Job Code	COVHBO
Entry Date	11/01/2021
Supervisor Level	E
Regular/Temporary	Regular
Empl Class	[Dropdown Menu]
Regular Shift	Not Applicable
Classified Ind	Classified
Standard Hours	40.00
FTE	1.000000
Work Period	W Weekly

27. Click on the drop-down menu next to **Empl Class** and select **VRSRetiree**.
28. Click on the **Payroll** tab.

The **Payroll** tab displays.



**Organizational Relationships** Modify a Person

Work Location | Job Information | Job Labor | **Payroll** | Salary Plan | Compensation

Jessica Doe  
Employee

Empl ID [REDACTED]  
Empl Record 0

**Payroll Information** 1 of 1

Effective Date 11/01/2021 Go To Row

Effective Sequence 0      Action Hire

HR Status Active      Reason Hire-VRSRT use only

Payroll Status Active      Job Indicator Primary Job

\*Payroll System Payroll for North America

Absence System Other

**Payroll for North America**

Pay Group MNP Non-Payroll

Employee Type S Salaried

Tax Location Code 087

GL Pay Type

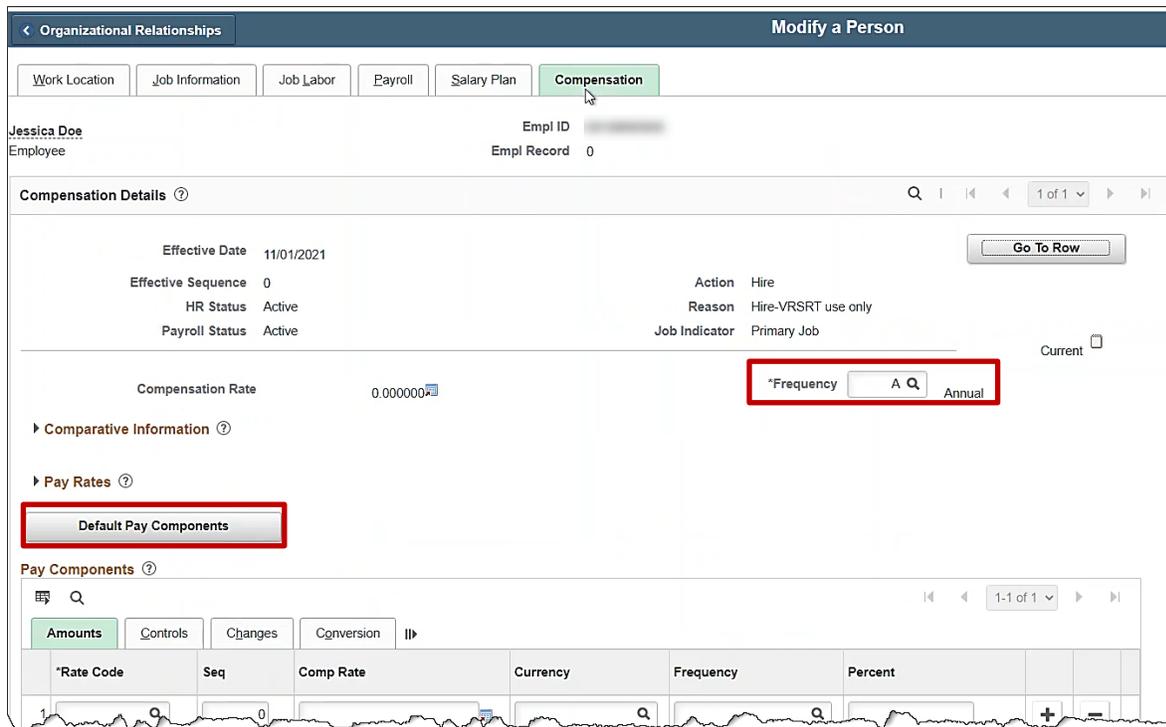
Combination Code

Holiday Schedule NOHOL LOCALITY

FICA Status Exempt

29. Click on the magnifying glass next to **Pay Group** and select **MNP** (Non-Payroll).
30. Click on the magnifying glass next to **Tax Location** and select the corresponding code.
31. Click on the **Compensation** tab.

The **Compensation** tab displays.



Organizational Relationships Modify a Person

Work Location | Job Information | Job Labor | Payroll | Salary Plan | **Compensation**

Jessica Doe  
Employee Empl ID [REDACTED]  
Empl Record 0

**Compensation Details** Go To Row

Effective Date 11/01/2021  
Effective Sequence 0  
HR Status Active  
Payroll Status Active

Action Hire  
Reason Hire-VRSRT use only  
Job Indicator Primary Job

Compensation Rate 0.000000 \*Frequency **A** Annual

▶ Comparative Information Current

▶ Pay Rates

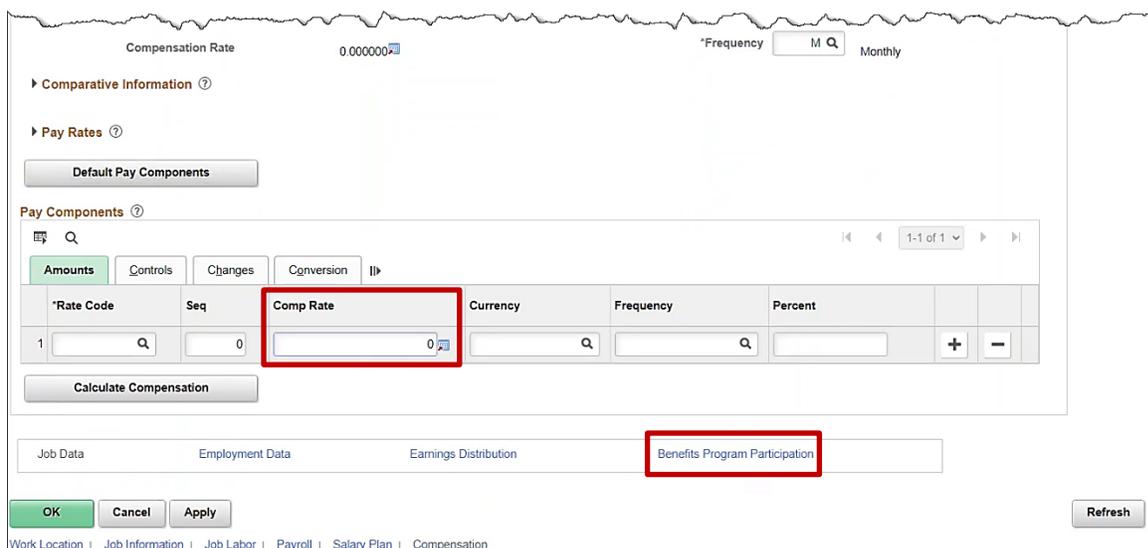
**Default Pay Components**

**Pay Components**

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1	0	0.000000		A	

32. Click on the magnifying glass next to **Frequency** and select **M** for **Monthly**.
33. Click on **Default Pay Components**.
34. Scroll down to the bottom of the page.

The bottom of the **Compensation** page displays.



Compensation Rate 0.000000 \*Frequency **M** Monthly

▶ Comparative Information

▶ Pay Rates

**Default Pay Components**

**Pay Components**

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1	0	0.000000		M	

Calculate Compensation

Job Data | Employment Data | Earnings Distribution | **Benefits Program Participation**

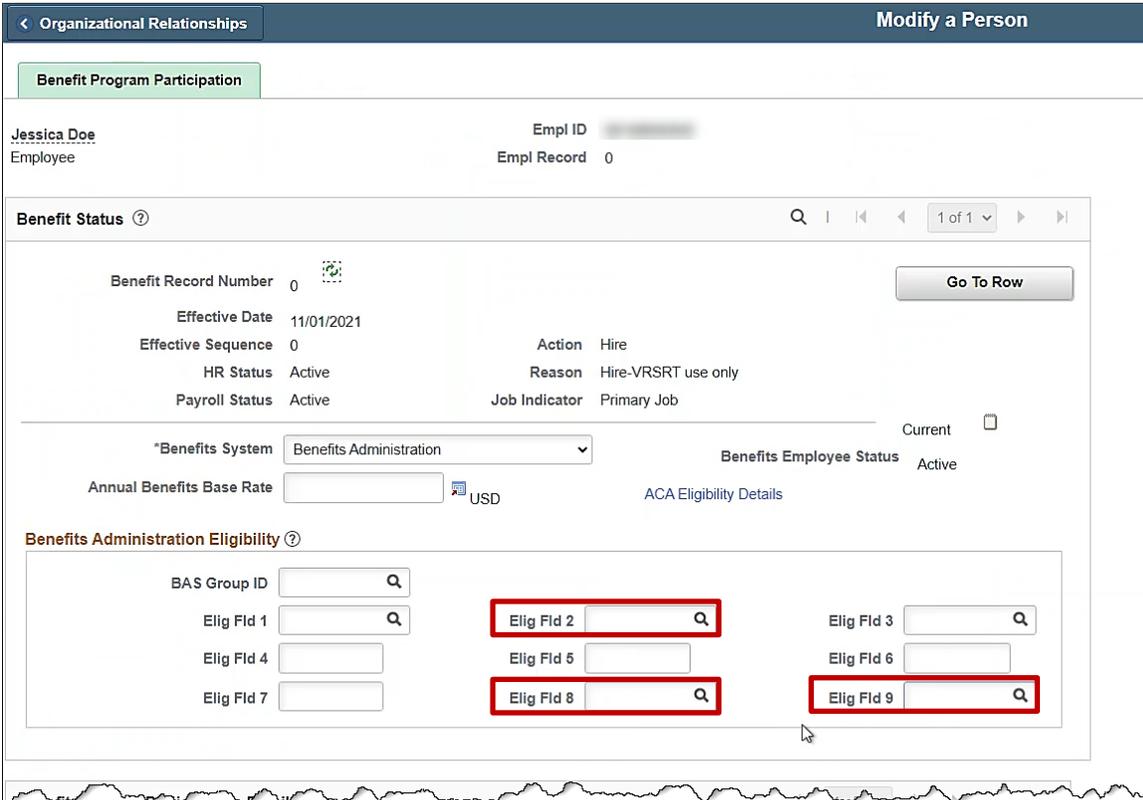
OK | Cancel | Apply Refresh

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

35. Enter **"0"** in the **Comp Rate** field.

36. Click the **Benefit Program Participation** hyperlink.

The **Benefit Program Participation** page displays.



**Organizational Relationships** **Modify a Person**

**Benefit Program Participation**

Jessica Doe  
Employee

Empl ID [REDACTED]  
Empl Record 0

**Benefit Status** 1 of 1

Benefit Record Number 0 **Go To Row**

Effective Date 11/01/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason Hire-VRSRT use only

Job Indicator Primary Job

\*Benefits System Benefits Administration Current

Annual Benefits Base Rate [REDACTED] USD Benefits Employee Status Active

ACA Eligibility Details

**Benefits Administration Eligibility**

BAS Group ID [REDACTED]

Elig Fld 1 [REDACTED]

Elig Fld 2 [REDACTED]

Elig Fld 3 [REDACTED]

Elig Fld 4 [REDACTED]

Elig Fld 5 [REDACTED]

Elig Fld 6 [REDACTED]

Elig Fld 7 [REDACTED]

Elig Fld 8 [REDACTED]

Elig Fld 9 [REDACTED]

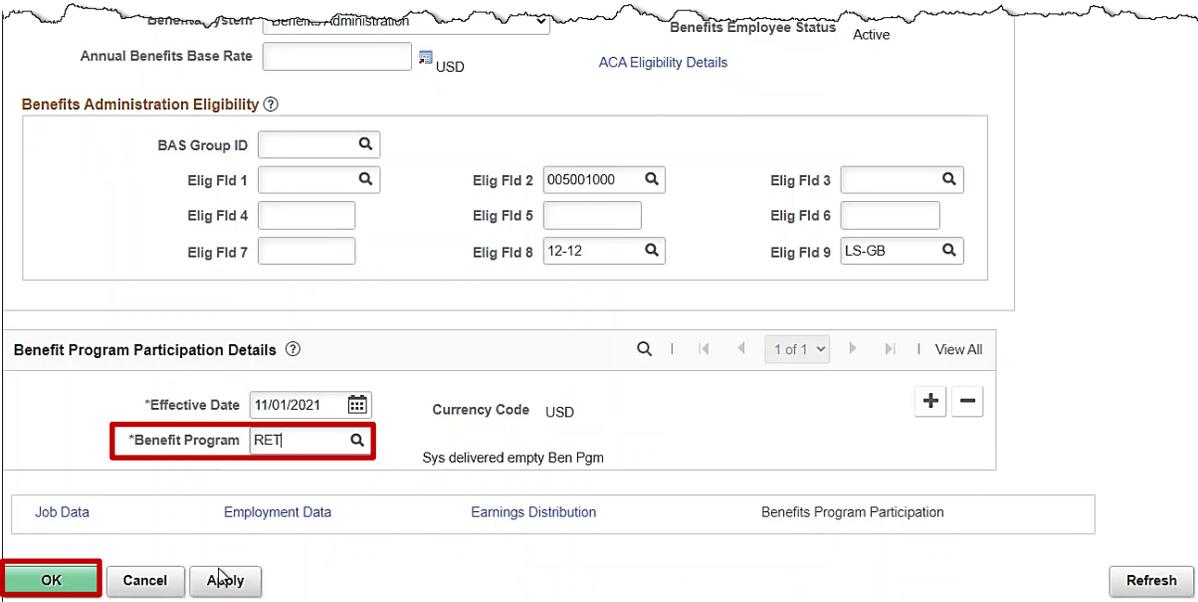
37. Enter **“005001000”** into **Elig Fld 2** for **Retiree Regular – VRS Managed**.

38. Enter **“12-12”** into **Elig Fld 8**.

39. Enter **“LS-GB”** into **Elig Fld 9** for **Retiree Linked Spouse-Grp Bill**.

40. Scroll down to the bottom of the page.

The bottom of the **Benefit Program Participation** page displays.



The screenshot shows the 'Benefit Program Participation' page. At the top, there are tabs for 'Benefits Administration' and 'Benefits Employee Status'. The 'Annual Benefits Base Rate' is set to USD. Below this is the 'Benefits Administration Eligibility' section with various fields for Elig Fld 1 through 9. The 'Benefit Program Participation Details' section is active, showing an effective date of 11/01/2021 and a currency code of USD. The 'Benefit Program' field is highlighted with a red box and contains the value 'RET'. Below this are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'. The 'OK' button is highlighted with a red box.

41. Change the **Benefit Program** to “RET”.

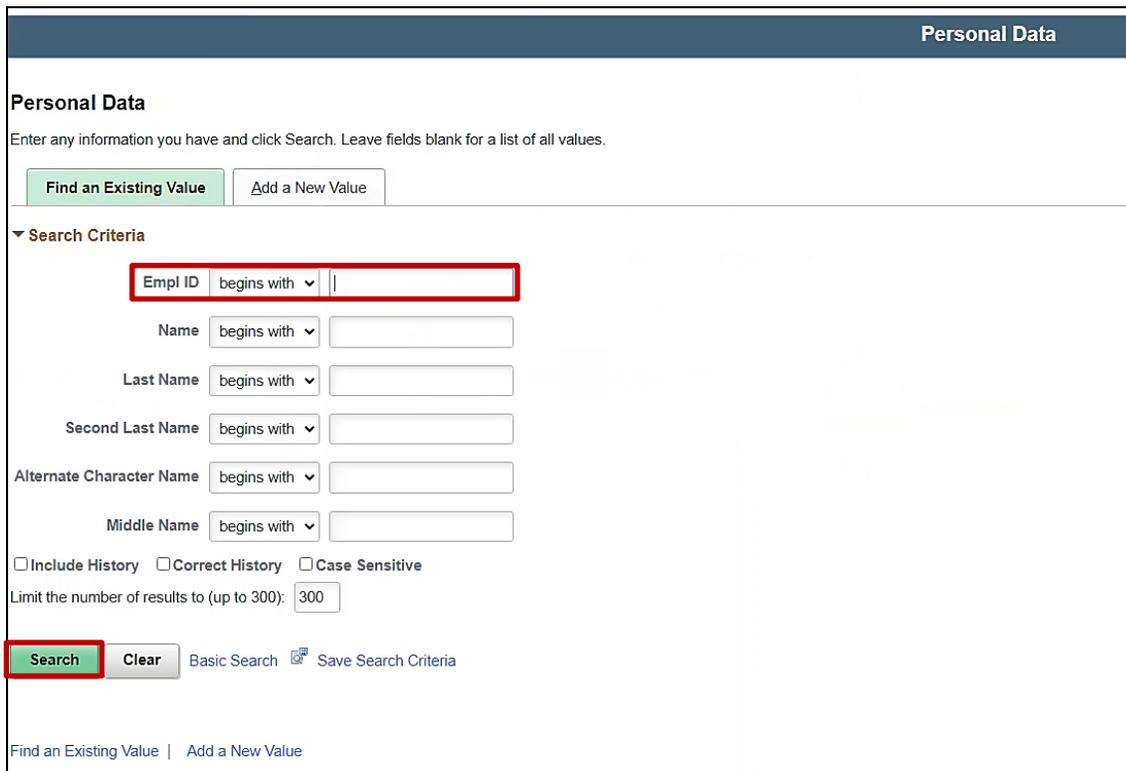
42. Click **OK**.

**Note:** Click **OK** if any warning pop-up boxes appear.

43. Navigate to the **Modify a Person** page of the employee through the following path:

**Navigator > Workforce Administration > Personal Information > Modify a Person**

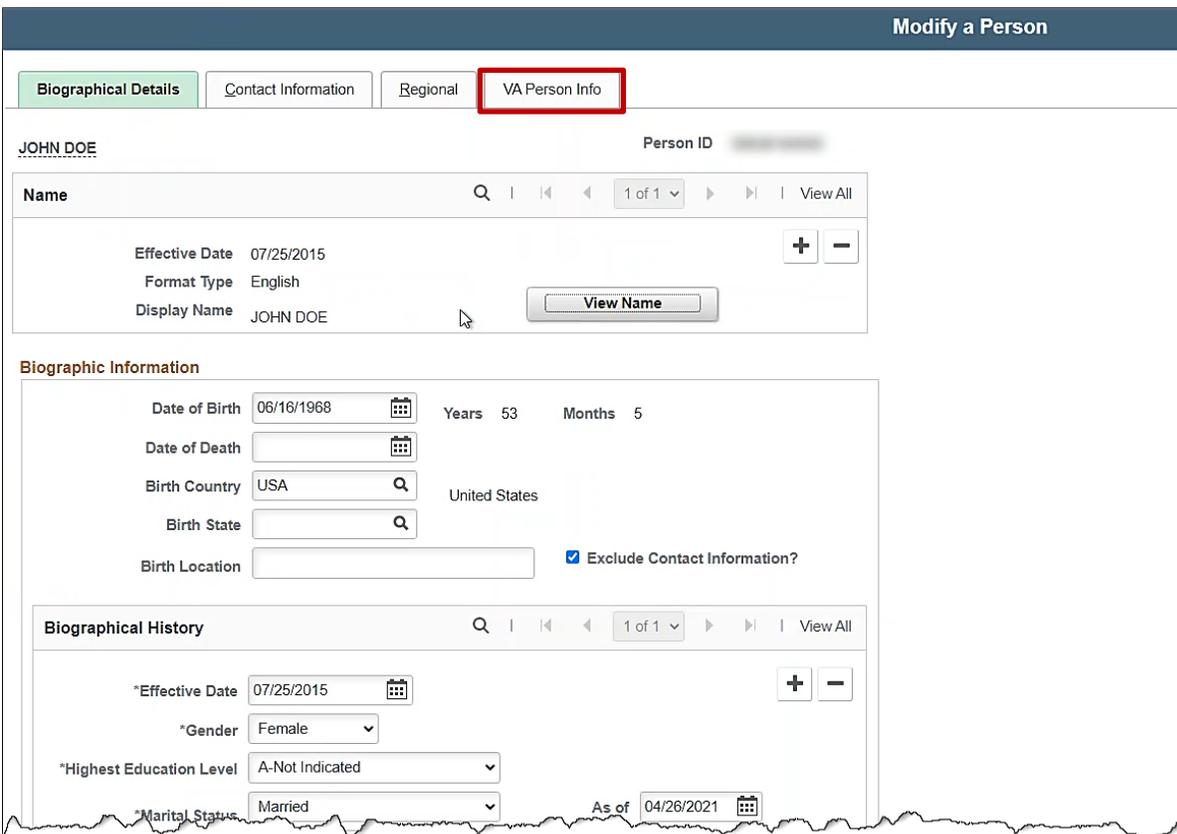
The **Personal Data** search page displays.



44. Enter the **Empl ID** of the employee.

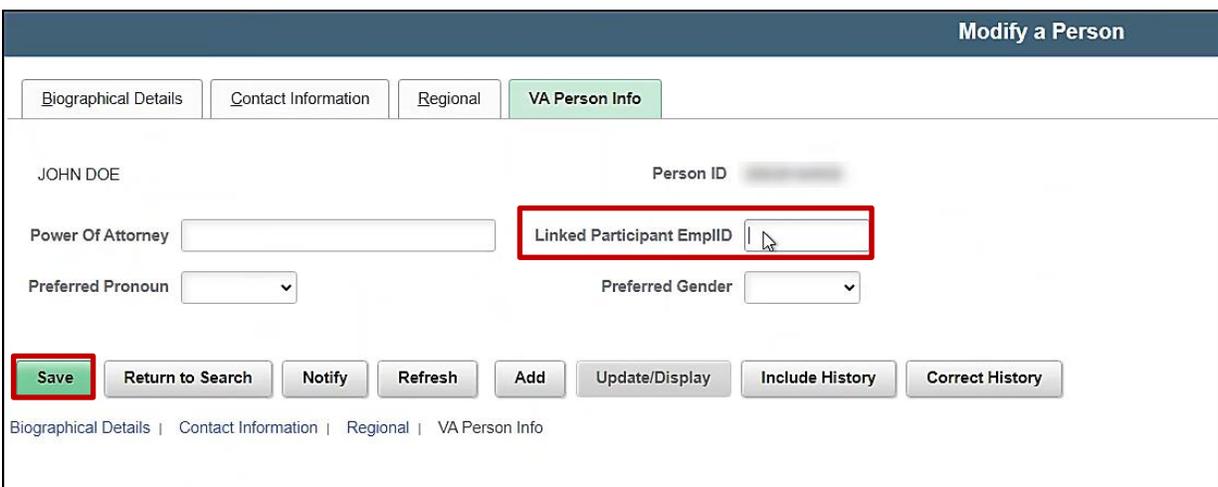
45. Click **Search**.

The **Biographical Details** page displays.



46. Click on the **VA Person Info** tab.

The **VA Person Info** tab displays.



47. Enter the Employee Spouse's EmplID in the **Linked Participant EmplID** field.

48. Click **Save**.

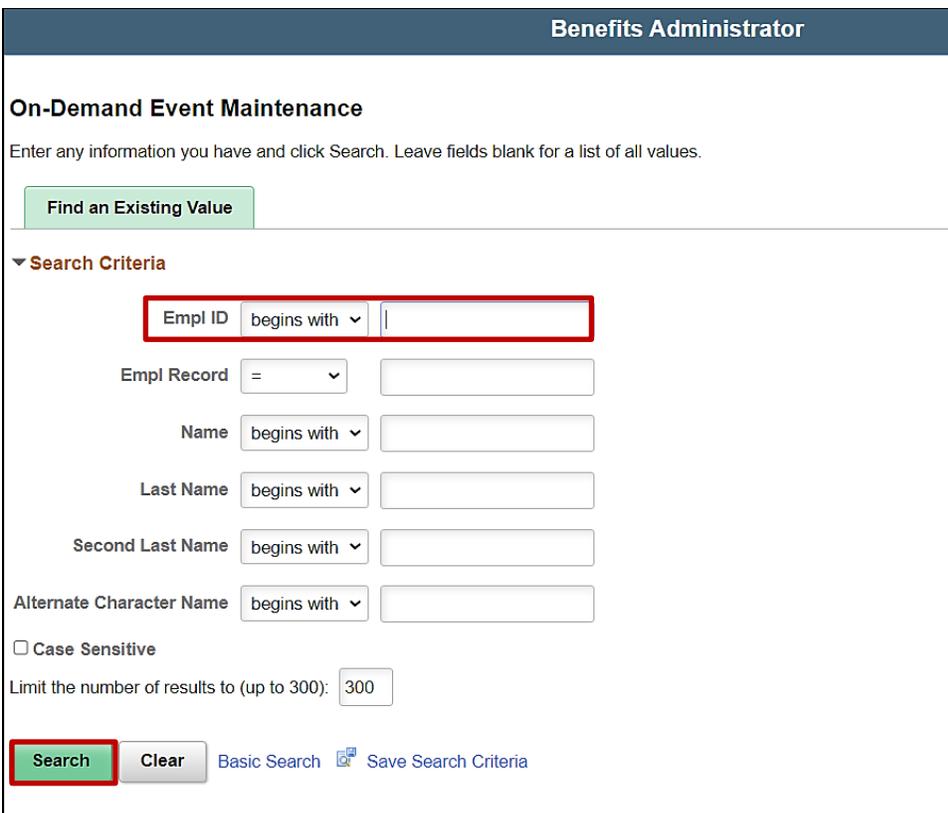
## Enroll the Spouse in Medicare

Once the Spouse has been hired into Cardinal and linked with the employee, the Spouse will now be eligible for Medicare benefit enrollment. The Agency BA will now navigate to the **On-Demand Event Maintenance** page and process the New Hire Medicare benefit enrollment for the Spouse.

1. Navigate to the **On-Demand Event Maintenance** page using the following path:

**Homepage > Benefit Administrator Tile > Benefit Management > On-Demand Event Maintenance**

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



**Benefits Administrator**

### On-Demand Event Maintenance

Enter any information you have and click Search. Leave fields blank for a list of all values.

**Find an Existing Value**

▼ **Search Criteria**

Empl ID begins with

Empl Record =

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

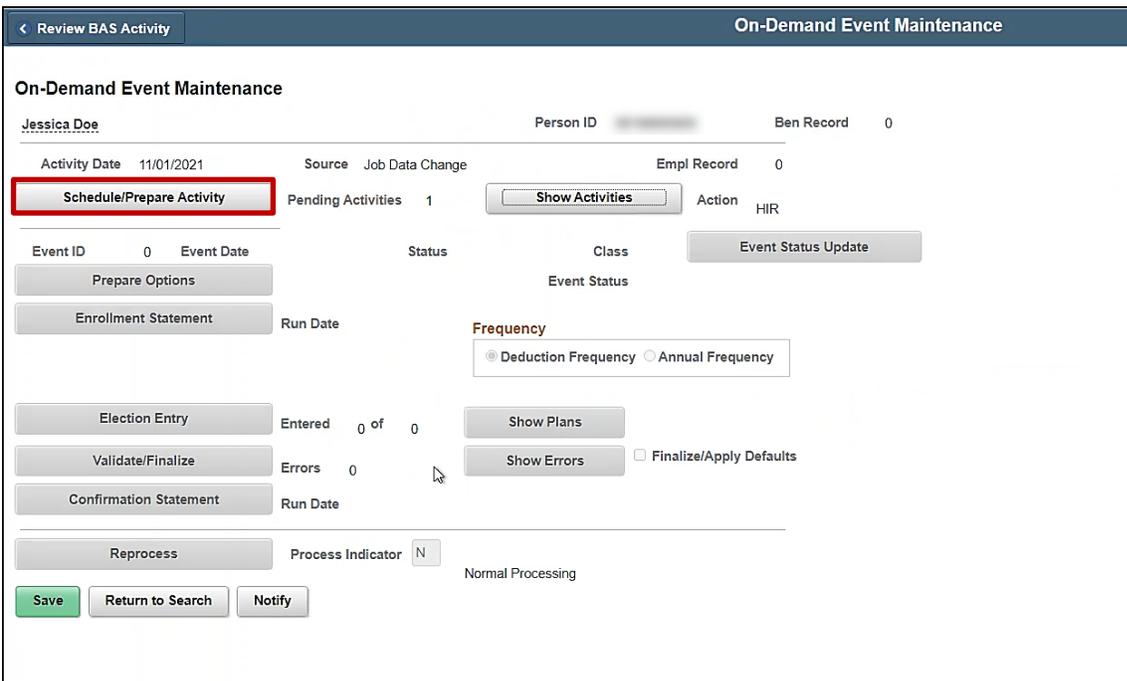
Case Sensitive

Limit the number of results to (up to 300):

**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

2. Enter the Spouse's **Empl ID** in the search field.
3. Click **Search**.

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



**On-Demand Event Maintenance**

Review BAS Activity | On-Demand Event Maintenance

Jessica Doe | Person ID [redacted] | Ben Record 0

Activity Date 11/01/2021 | Source Job Data Change | Empl Record 0

**Schedule/Prepare Activity** | Pending Activities 1 | Show Activities | Action HIR

Event ID 0 | Event Date | Status | Class | Event Status Update

Prepare Options | Enrollment Statement | Run Date | Frequency: Deduction Frequency (selected) / Annual Frequency

Election Entry | Entered 0 of 0 | Show Plans

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

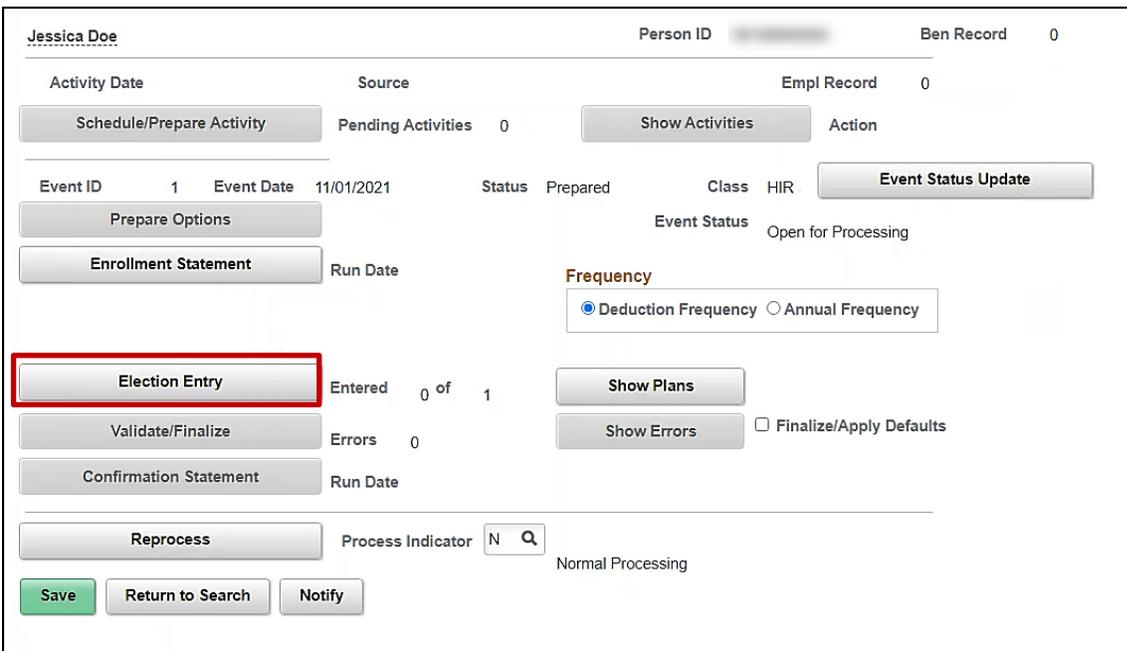
Confirmation Statement | Run Date

Reprocess | Process Indicator N | Normal Processing

Save | Return to Search | Notify

4. Click the **Schedule/Prepare Activity** button.

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



Jessica Doe | Person ID [redacted] | Ben Record 0

Activity Date | Source | Empl Record 0

Schedule/Prepare Activity | Pending Activities 0 | Show Activities | Action

Event ID 1 | Event Date 11/01/2021 | Status Prepared | Class HIR | Event Status Update

Prepare Options | Event Status Open for Processing

Enrollment Statement | Run Date | Frequency: Deduction Frequency (selected) / Annual Frequency

**Election Entry** | Entered 0 of 1 | Show Plans

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

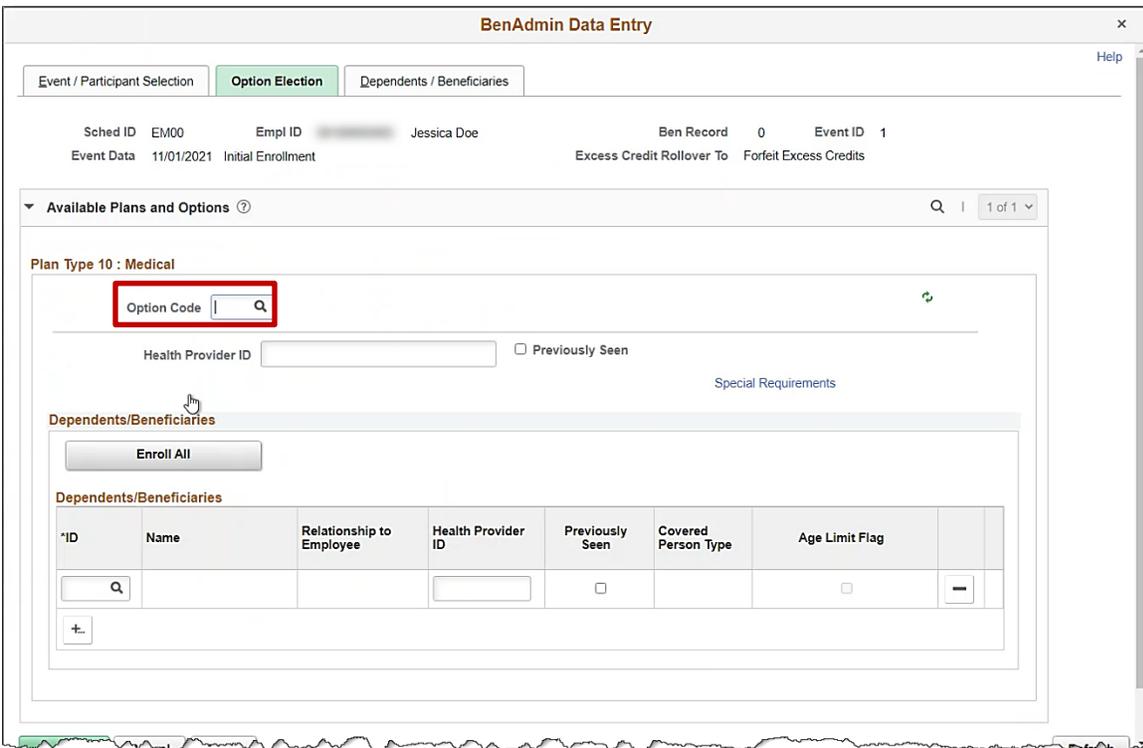
Confirmation Statement | Run Date

Reprocess | Process Indicator N | Normal Processing

Save | Return to Search | Notify

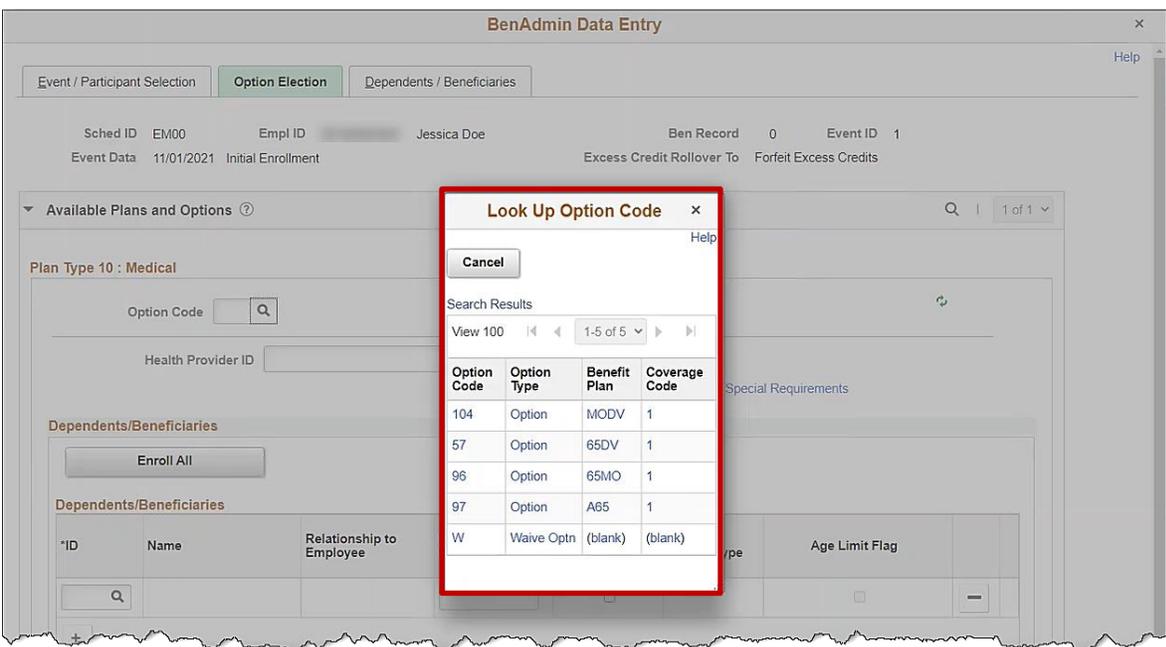
5. Click the **Election Entry** button.

The **BenAdmin Data Entry** page displays.



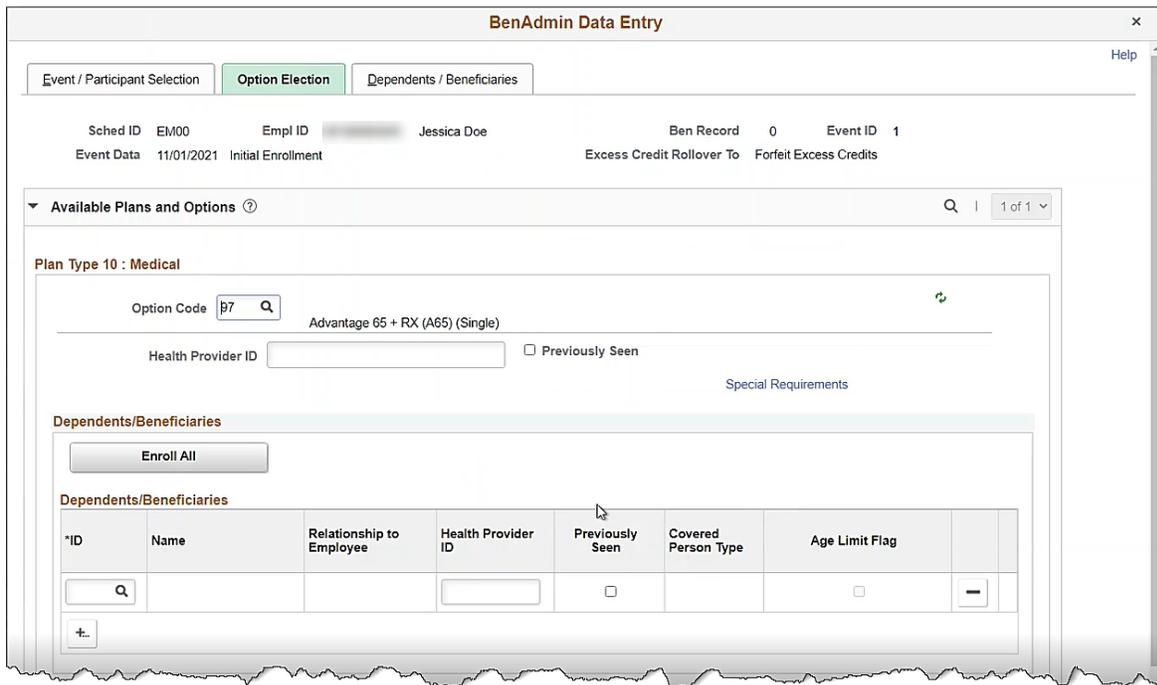
6. Click on the magnifying glass next to **Option Code** under **Plan Type 10: Medical**.

The **Look Up Option Code** pop-up displays.



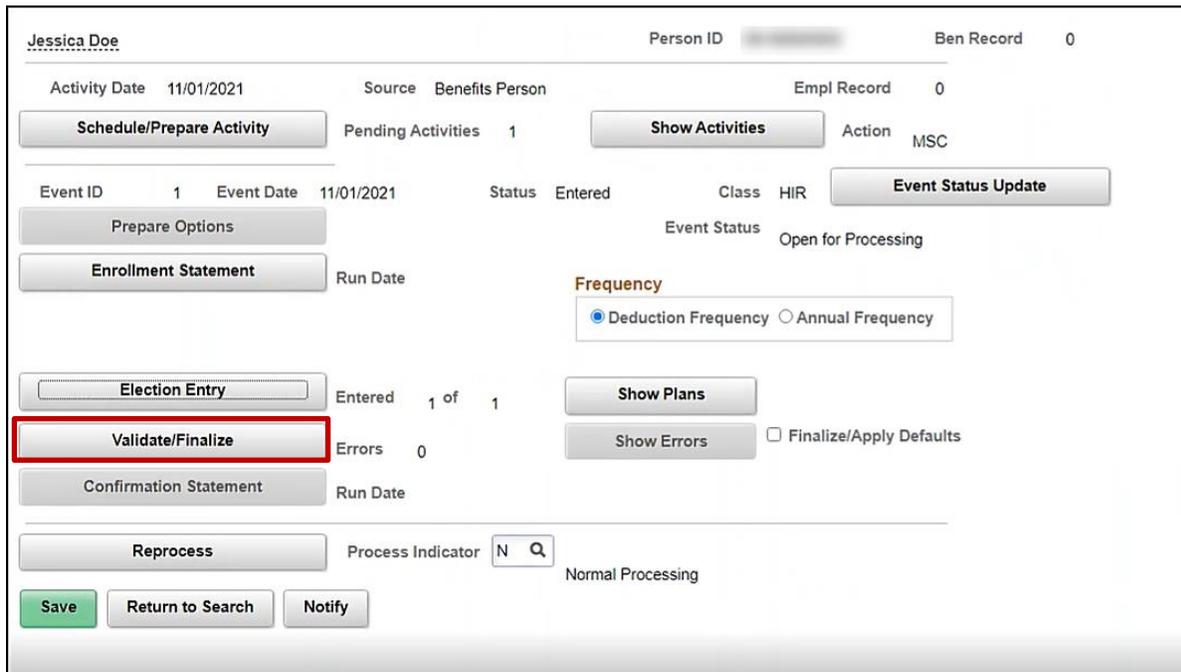
7. Select one of the available **Medical Plans**.

The **BenAdmin Data Entry** page returns.



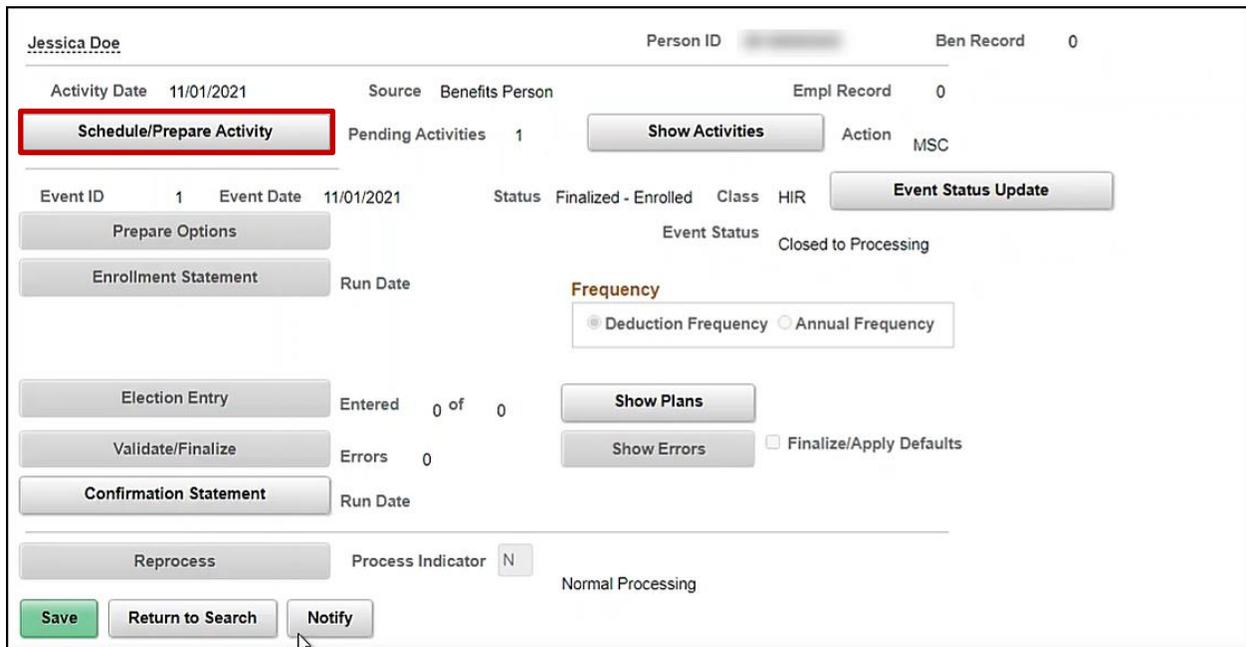
8. Click **OK** at the bottom of the page.

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



9. Click **Validate/Finalize** button.

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



Activity Date 11/01/2021 Source Benefits Person Empl Record 0

**Schedule/Prepare Activity** Pending Activities 1 **Show Activities** Action MSC

Event ID 1 Event Date 11/01/2021 Status Finalized - Enrolled Class HIR **Event Status Update**

Prepare Options Event Status Closed to Processing

Enrollment Statement Run Date **Frequency**

Deduction Frequency  Annual Frequency

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

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

Confirmation Statement Run Date

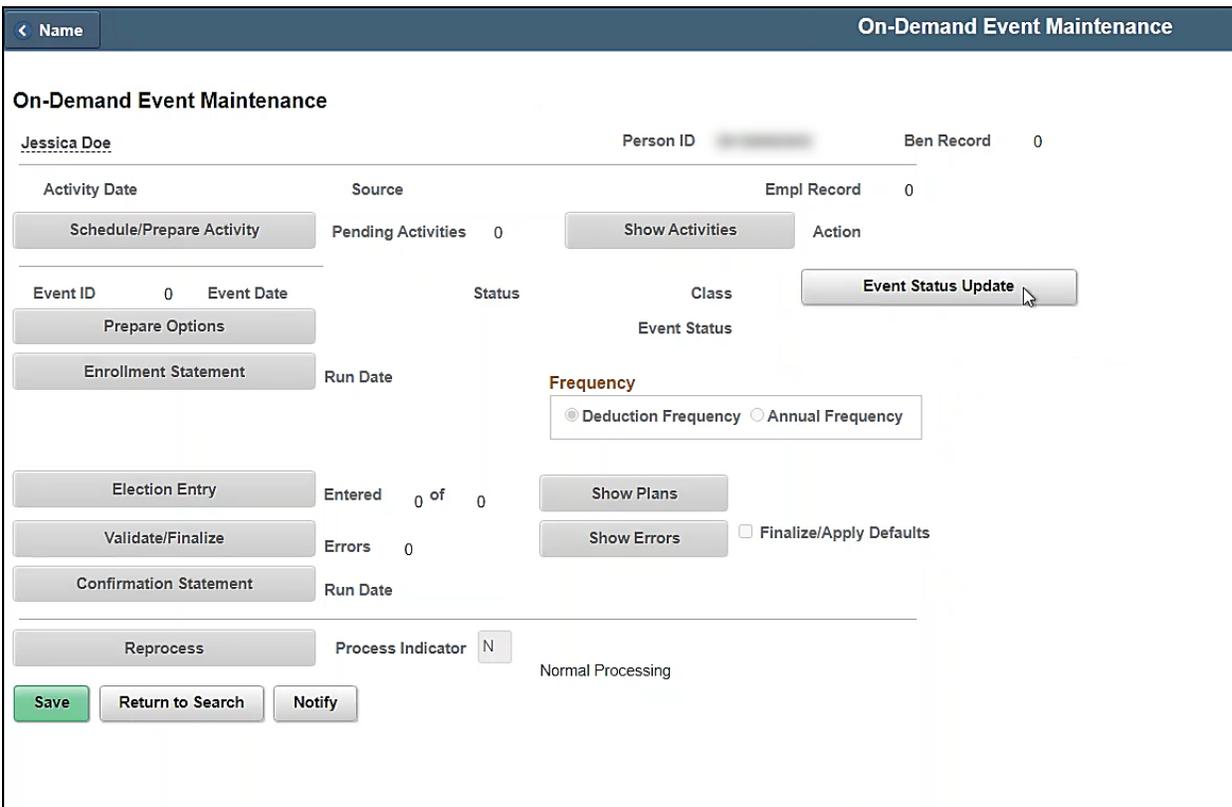
Reprocess Process Indicator N Normal Processing

**Save** **Return to Search** **Notify**

**Note:** The **Hire** event has been closed to processing, but the **MSC** is still waiting to be processed.

10. Click the **Schedule/Prepare Activity** button.

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



**On-Demand Event Maintenance**

← Name On-Demand Event Maintenance

**On-Demand Event Maintenance**

Jessica Doe Person ID [REDACTED] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 0 Event Date Status Class Event Status Update

Prepare Options Event Status

Enrollment Statement Run Date

**Frequency**

Deduction Frequency  Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

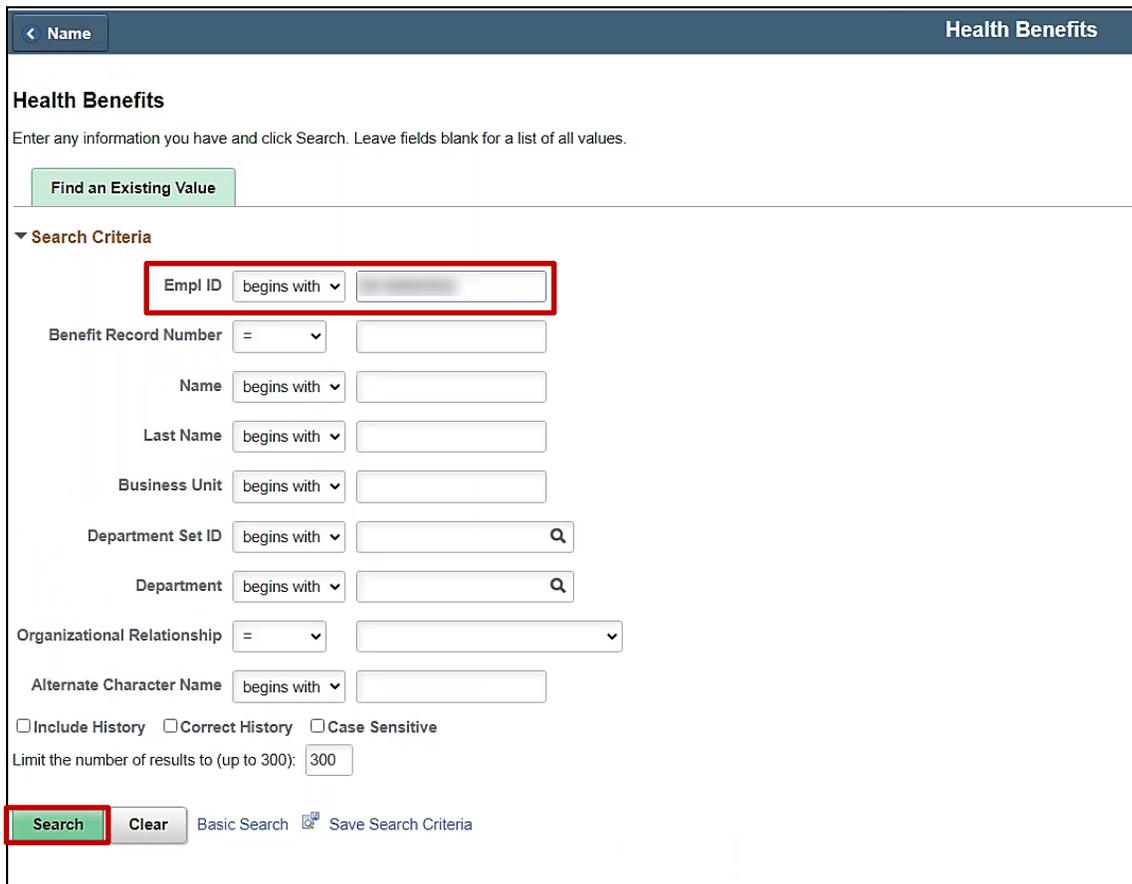
Save Return to Search Notify

**Note:** Once the **MSC** event is scheduled the event automatically closes out. The **GEM** event is processed first so that in Cardinal an audit trail exists depicting the enrollment opportunity was due to Gain Eligibility for Medicare. While the MSC event will provide the same enrollment opportunities, the connection would be too "Miscellaneous" which does not depict the reason.

11. Navigate to the **Health Benefits** page for the Spouse to confirm medical benefit enrollment using the following path:

**Navigator > Benefits > Enroll in Benefits > Health Benefits**

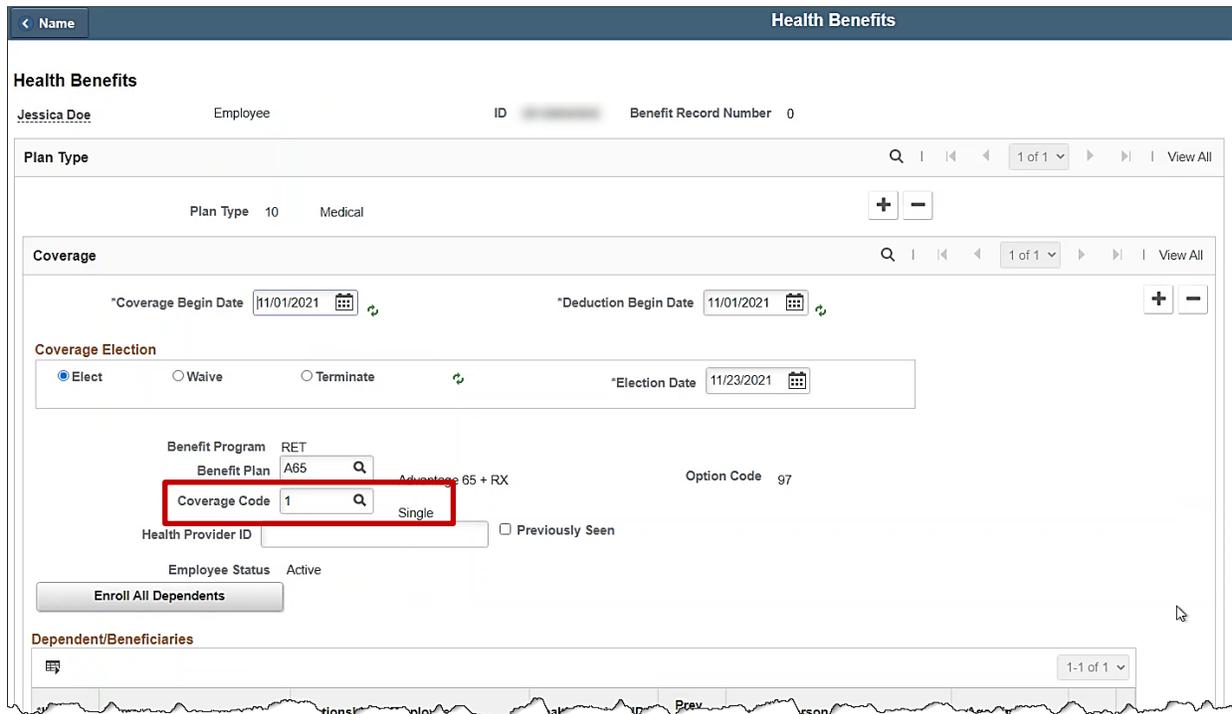
The **Health Benefits** search page displays.



12. Enter the Spouse's **Empl ID**.

13. Click **Search**.

The **Health Benefits** page displays.



**Health Benefits**

Jessica Doe Employee ID [REDACTED] Benefit Record Number 0

**Plan Type** Plan Type 10 Medical

**Coverage** \*Coverage Begin Date 11/01/2021 \*Deduction Begin Date 11/01/2021

**Coverage Election**  Elect  Waive  Terminate \*Election Date 11/23/2021

Benefit Program RET  
Benefit Plan A65 Advantage 65 + RX  
Coverage Code 1 Single  
Option Code 97

Health Provider ID [REDACTED]  Previously Seen

Employee Status Active

Enroll All Dependents

**Dependent/Beneficiaries**

14. Confirm the **Medical** plan enrollment for the **Spouse** is correct.