



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### Benefits Quick Reference Guide Overview

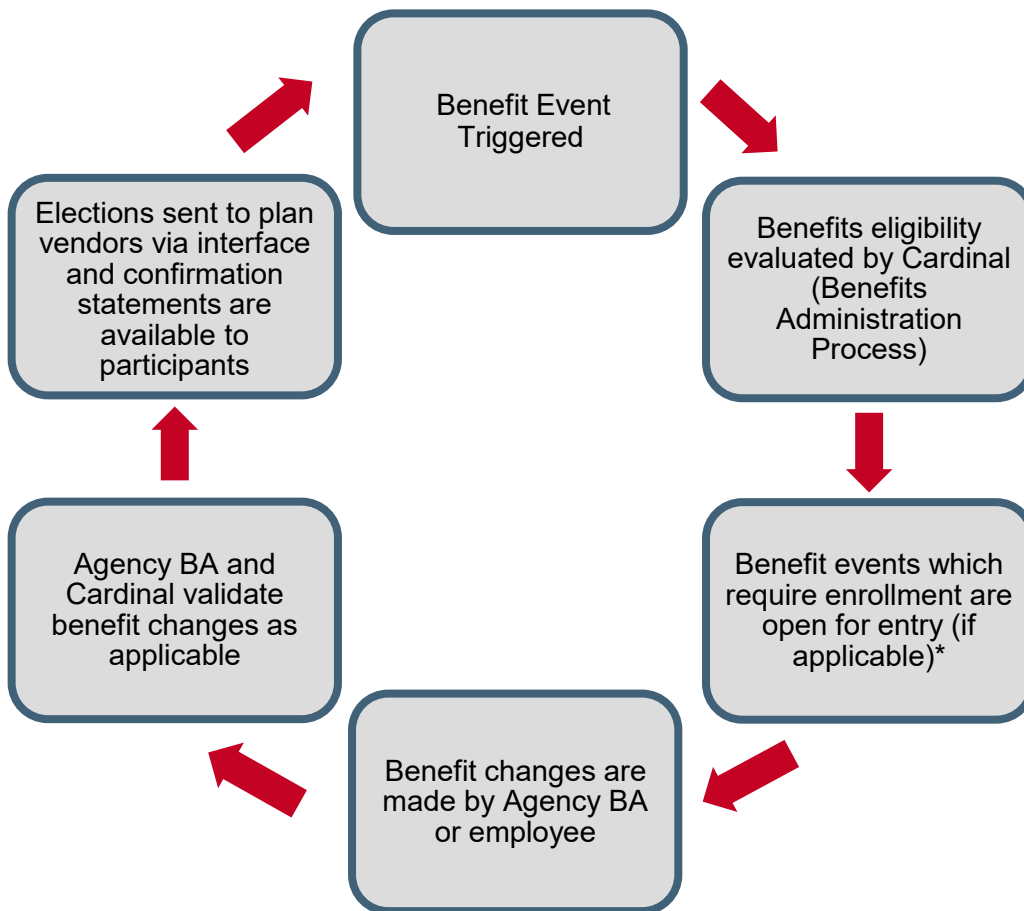
This Job Aid provides guidance on the most common Benefit Administration (BA) actions, including completing the enrollment process for an employee, approving newly added dependents, and troubleshooting errors (identify, research, and resolve) related to benefit enrollment.

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### Benefit Administration Process



\*Most job changes invoke a Benefit Event to be evaluated by Benefit Administration; however, many are immediately closed as the evaluation determines that no benefit eligibility change exists (e.g., supervisor change).



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### Benefit Event Classes

The following benefit events are used in the Cardinal System.

Event Class	Description	Event Class	Description
ADR	Address Change	JOB	Job Change
A26	Covered Child Lost Eligibility	LAT	LOA Benefits Termination
BEN	Benefits Change (OHB Only)	LEG	Lost Eligibility Gov't Plan
BIR	Birth or Adoption	LEM	Lost Eligibility Medicare/caid
DCH	Death of Child	LOA	Leave of Absence
DGE	Dependent Gained Eligibility with ER	LOF	Layoff
DIV	Divorce	MAR	Marriage
DLE	Dependent Lost Eligibility with ER	MSA	Medical Support Order – Add
DSP	Death of Spouse	MSC	Misc Job Change
DWD	Deceased EE w/ Covered Dependent	MSR	Medical Support Order – Remove
ELIG	Elig Config Change	REH	Rehire
FPP	Failure to Pay Premium	RET	Retirement
FSC	Family Status Change	RFL	Return from Leave
FSD	Dependent Care Cost/Covrg Chg	STC	Employment Change PT/FT FT/PT
GEM	Gain Eligibility Medicare/aid	TER	Termination
HIP	HIPAA Spec Enroll/Loss Covrg	XFO	Transfer to Agency
HIR	Initial Enrollment	XFR	Transfer within Agency



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### The On-Demand Event Maintenance Page

The On-Demand Event Maintenance Page is used to create and maintain Benefit Events. Benefit Events are created when an employee experiences a qualifying midyear event or experiences a job or personal data change that might potentially have an impact to an employee's benefits.

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

**Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance**

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

### 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): 

300

Search

Clear

Basic Search

 Save Search Criteria

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

**Note:** You can also search by Employee Record or Name using the corresponding fields. 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.



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The **Search Results** display on the bottom portion of the page.

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

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

Search Results

View All 1-1 of 1

Empl ID	Empl Record	Name	First Name	Last Name	Second Last Name	Alternate Character Name	Middle Name
<span style="border: 2px solid red; padding: 2px;">0</span>	0				(blank)	(blank)	D

4. Click on the **Empl ID** link.

The **On-Demand Event Maintenance** page for the applicable employee displays.

**On-Demand Event Maintenance**

Person ID

Ben Record 1

Activity Date

Source

Empl Record 0

Pending Activities 2

Action

Event ID 0

Event Date

Status

Class

Event Status

Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Entered 0 of 0

Errors 0

☐ Finalize/Apply Defaults

Run Date

Process Indicator N

Normal Processing

5. Review the fields displayed. There are several important items on the **On-Demand Event Maintenance** page for the Agency BA to understand:
  - a. **Activity Date** – This is the date on which the trigger activity for the Benefits Administration event occurred. If the system finds only one activity for the employee, the system automatically displays the date
  - b. **Source** – Displays the type of action that triggered the event, e.g., a change to the employee address or job data, or manually adding an event



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- c. **Schedule/Prepare Activity** – Click to prepare the benefit options available for a Benefit Event
  - d. **Pending Activities** – Displays the number of activities waiting to be processed. If no activities are waiting to be processed, the Pending Activity field is blank
  - e. **Show Activities** – Click to select a Benefit Event to process if more than one activity exists
  - f. **Prepare Options** – Typically, after the Benefit Event has been scheduled and assigned, options and costs are automatically prepared, provided no errors occur during scheduling and program assignment. However, if errors occur and need further resolution, click the **Prepare Options** button to continue automated processing and to prepare benefit options and election defaults. Due to an error during the scheduling and assignment, the **Prepare Options** button is available only when the Benefit Event's process status is "Assigned", "Assigned Error", and "Prepared Error"
  - g. **Enrollment Statement** – Not Used in Cardinal
  - h. **Election Entry** – Click to perform employee election entry  
**Note:** See the [Entering Benefit Elections](#) section of this Job Aid for additional information.
  - i. **Show Plans** – Click to show the types of benefits available for enrollment
  - j. **Validate/Finalize** – Click the **Validate/Finalize** button after entering the employee's elections to validate and load the information to the benefit tables. This button also determines default elections for the participant and enrolls them
  - k. **Show Errors** – Click to review error messages produced by Benefit Event processing  
**Note:** See the [Troubleshooting Errors](#) section of this Job Aid for additional information on errors.
  - l. **Confirmation Statements** – This button is not used on the **On-Demand Event Maintenance** page. Confirmation Statements can be reviewed using the following path:  
**Benefits Administrator Tile > Benefits Management > Online Confirmation Statements**
  - m. **Reprocess** – Click to reprocess Benefit Events once the status has been changed on the **Event Status Update** page
6. Click the **Show Activities** button to select a Benefit Event to process.



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The **BAS Activity** table displays.

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
<input type="checkbox"/>	0	Manual Event	06/01/2021	0	BIR		+	-
<input type="checkbox"/>	0	Job Data Change	12/01/2020	0	JOB		+	-

OK Cancel

- Click the Select checkbox option for the Benefit Event you want to process from the options shown in the **BAS Activity** table.
- Click the **OK** button.

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

On-Demand Event Maintenance

Person ID [ ] Ben Record 1

Activity Date [ ] Source [ ] Empl Record 0

**Schedule/Prepare Activity** Pending Activities 2 **Show Activities** Action

Event ID 0 Event Date [ ] Status [ ] Class [ ] **Event Status Update**

Prepare Options

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

- Click the **Schedule/Prepare Activity** button to prepare the Benefit Event for election entry.

**Note:** To continue the enrollment process for the Manual Event, reference the Job Aid titled BN361\_Completing a Manual Event. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.



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- Click the **Event Status Update** button to select the Benefit Event to be reprocessed if it is necessary to reopen an event.

The **BenAdmin Event Status Update** page displays.

**BenAdmin Event Status Update**

Update Event Status

Empl ID [ ] Ben Record 0

Event Status Update ?

1 of 3

Schedule ID	EM00	<input type="checkbox"/> Event Disconnected	<input type="checkbox"/> Address Eligibility Changed
Event Date	07/21/2020		<input type="checkbox"/> MultiJob Indicator Changed
Event ID	3		<input type="checkbox"/> Job Eligibility Changed
Event Class	BIR Birth or Adoption		<input checked="" type="checkbox"/> Event Out of Sequence
Event Priority	410		<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program	SAL	Print Option	Print Both Forms
Process Status	Prepared	*Process	Normal Processing
Action Source	Manual Event	*Event Status	Open for Processing

Schedule ID EM00 ☐ Event Disconnected

Event Date 07/05/2020

Event ID 2

Event Class JOB Job Change

Event Priority 125

Benefit Program SAL

Process Status Notified

Action Source Job Data Change

☐ Address Eligibility Changed

☐ MultiJob Indicator Changed

☐ Job Eligibility Changed

☐ Event Out of Sequence

☐ Finalize/Apply Defaults

Print Option Print Confirmation Forms Only

\*Process Normal Processing

\*Event Status Closed to Processing

OK Cancel Apply Refresh

**Note:** See the [Event Status: Working with Events](#) section of this Job Aid for additional information.





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### Entering Benefit Elections

1. To enter benefit elections on behalf of employees who did not enroll online, access the **Options Elections** tab of the **BenAdmin Data Entry** page using the following path:

**Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance > Empl ID > Election Entry**

**Note:** See steps 1-4 of the [On-Demand Event Maintenance Page](#) section for details on entering and selecting the Employee ID.

The **BenAdmin Data Entry** page displays.

The screenshot shows the **BenAdmin Data Entry** page with the **Option Election** tab selected. The page displays employee information for GLADYS ALVAREZ PORTILLO and a list of available plans. A red box highlights the **Option Code** search field, and a red arrow points to a **Look Up Option Code** pop-up window. The pop-up window shows a table of search results for option codes.

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

2. Click on the **Options Elections** tab.
3. Click the **Option Code Look Up** icon to view the medical plans available in a pop-up window.

**Note:** On the **BenAdmin Data Entry** page in the **Option Election** tab, Benefit Administrators will enter benefit elections on behalf of employees who did not enroll online. For more detailed information on how to enroll an employee in benefits, see the Course titled BN361\_Benefit Enrollment and Maintenance Course. This course can be found on the Cardinal Website in **Course Materials** under **Learning**.



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### Approving Dependents

1. Follow the section above to Reopen the benefit event that requires a dependent to be approved and then, access the **Dependents/Beneficiaries** tab of the **BenAdmin Data Entry** page using the following path:

**Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance > Empl ID > Election Entry**

**Note:** See steps 1-4 of the [On-Demand Event Maintenance Page](#) section for details on entering and selecting the Employee ID.

The **Ben/Admin Data Entry** page displays.

The screenshot shows the BenAdmin Data Entry page with the 'Dependents / Beneficiaries' tab selected. The page displays various fields for event and participant information, a table of dependents, and a link to change or add dependent data.

**BenAdmin Data Entry**

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

Schedule ID EM00 Employee ID [Redacted]  
Event ID 1 Event Data 09/29/2020 Birth or Adoption  
Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits

**Dependent/Beneficiaries Currently on Record**

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Portillo,Baby	Child	Unapproved Dependent	09/29/2020

[Change/Add Dependent Data](#)

**Elections Requiring Supplemental Information**

10	Medical	<a href="#">Enroll Dependents</a>
----	---------	-----------------------------------

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

2. Click the **Dependent/Beneficiaries** tab.

**Note:** On the **BenAdmin Data Entry** page in the **Dependents/Beneficiaries** tab, employee dependents are listed with their approval status.

3. Click the **Change/Add Dependent Data** link to update the status of a dependent.



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The **Dependent/Beneficiary** page displays.

The screenshot shows the 'Dependent/Beneficiary' page with the 'Personal Profile' tab selected. The page displays fields for Date of Birth, Birth Country, Date of Death, Medicare Entitled Date, Birth Location, Birth State, and Riders/Orders exist. Below these fields is the 'Personal History' section, which includes a dropdown menu for '\*Dependent Beneficiary Type'. The dropdown menu is open, showing options: Unapproved Dependent, Approved Dependent (highlighted), Beneficiary, COBRA Dependent Only, None, QDRO Estate, QDRO Representative - Employee, QDRO Representative - Recipient, and Unapproved Dependent. The 'Approved Dependent' option is highlighted in blue.

4. Click the **Personal Profile** tab.
5. Select the "Approved Dependent" from the **Dependent Beneficiary Type** field dropdown list.

**Note:** For more detailed information on how to update dependents approval status, see the Course titled BN361\_Benefit Enrollment and Maintenance Course. This course can be found on the Cardinal Website in **Course Materials** under **Learning**.



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### Event Status: Working with Events

1. To monitor an event status, access the **Event Status Update** page using the following path:

**Benefits Administrator > Benefits Management > On-Demand Event Maintenance > Empl ID > Event Status Update**

**Note:** See steps 1-4 of the [On-Demand Event Maintenance Page](#) section for details on entering and selecting the Employee ID.

The **Event Status Update** page displays.

The screenshot shows the 'BenAdmin Event Status Update' window. It contains three event entries, each with a set of fields on the left and a set of checkboxes and dropdowns on the right. Red boxes highlight specific fields in each entry:

- Event 1:** Event Date (06/01/2020), Event ID (2), Event Class (DIV Divorce), Event Priority (415), Benefit Program (SPT), Process Status (Finalized - Enrolled), Action Source (Manual Event).
- Event 2:** Event Date (05/07/2020), Event ID (6), Event Class (BIR Birth or Adoption), Event Priority (410), Benefit Program (SPT), Process Status (Prepared), Action Source (Manual Event).
- Event 3:** Event Date (04/27/2020), Event ID (1), Event Class (HIR Initial Enrollment), Event Priority (100), Benefit Program (SPT), Process Status (Finalized - Enrolled), Action Source (Job Data Change).

On the right side of each entry, there are checkboxes for 'Address Eligibility Changed', 'MultiJob Indicator Changed', 'Job Eligibility Changed', 'Event Out of Sequence', and 'Finalize/Apply Defaults'. Below these are dropdowns for 'Print Option', '\*Process', and '\*Event Status'. The highlighted fields in the red boxes are: Event Date, Event ID, Event Class, Event Priority, Benefit Program, Process Status, and \*Event Status.

2. Review the fields displayed. There are several important items on the **Event Status Update** page for the Agency BA to understand:

- a. **Basic Event information**

- i. **Event Date:** The date in which an event occurred
- ii. **Event Class:** The type of event
- iii. **Benefit Program:** The benefit program the employee was in at the time of the event processing



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- b. **Event Flags:** When changes, insertions or deletions have occurred to some employee data after an event has been processed, the system sets flags on the event. These flags indicate that a participant's event may need to be reprocessed  
**Note:** See the **Flagged Events** section of this Job Aid for additional information.
- c. **Event Status:** Indicates if an event is Open (ready for processing), Closed (awaiting processing/already processed) or Voided (manually voided)
- d. **Process Status:** During Benefits Administration, there are a series of actions taken in evaluating an event and varying results from these actions. The Event Status chart describes each status and possible reasons for the event resulting in that status
- e. **Process Indicator:** The Process indicator reflects the action last executed by Benefits Administration to the event. Typically, this will reflect Normal Processing. At times, an event will need to be reprocessed. This may require a reassignment of the Benefits Program or simply opening the Election Entry for corrections of enrollment elections

The following chart describes the different types of **Event Statuses**.

Event Status	Description
<b>Open (O)</b>	Open events are those events that are currently being processed. Only one event for a participant can be open at a time. If more than one event is open, one event must be closed to process the other event. Open events can be updated to Closed, either by the system or manually.
<b>Closed (C)</b>	Closed events are those events that are not currently being processed by the system. Events could be closed because they are waiting for another event to be processed prior to opening, or they could be closed because they have already been enrolled. Closed events can be updated to Open, either by the system or manually.
<b>Void (V)</b>	Voided events are those events that have been manually voided because the event is no longer needed, and all eligibility processing related to it has been reversed. In effect, it is as if the event never occurred. This should never be used without prior consultation with DHRM. Voided events can be updated to Open or Closed through event reprocessing.



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The following chart describes the different types of **Process Status**.

Process Status	Reason/Description
<b>Assign Error (AE)</b>	Benefits Administration is unable to assign Benefit Program due to missing or incorrect information.
<b>Assign None (AN)</b>	Benefits Administration was unable to assign a benefit program. This could be a result of the Benefit Flag set to a terminated Employee Record (Empl_Rcd).
<b>Assigned (AS)</b>	Benefits Administration can assign Benefit Program because a prior event is Open. It is possible the Open Event is appearing on the MSC Event Evaluation report.
<b>Elections Entered (ET)</b>	A Benefits Administrator (or the employee through Self Service) has entered the employee's new elections into the system and they are ready for validation by the Benefits Administration Process.
<b>Elections Error (EE)</b>	The system encountered an error in processing the elections for the employee associated with the event. This could be a result of the dependent effective dates, or a mismatch between coverage code and listed dependents. It could also be a result of a missing pay calendar.
<b>Finalized – Benefit Pgm None (FA)</b>	Employee event has no program assignment and no current elections. This could be a result of the Benefit Flag being set to a terminated Empl_Rcd. It could also be the result of an address change when employee is not active.
<b>Finalized – Enrolled (FE)</b>	Benefits Administration processing is complete for the employee event. All elections have been validated and loaded.
<b>Finalized – Prepare None (FP)</b>	Benefit Administration is acknowledging that the employee's eligibility has not changed.
<b>Notified (NT)</b>	Employee has accessed the Self-Service event but has not submitted elections.
<b>Prepare Error (PE)</b>	Error in preparation of options. The system has encountered an error. This could be a result of a missing ICI ABBR or a missing payroll calendar.



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<b>Prepared (PR)</b>	The system has calculated eligible options, credits, rates, and proof requirements for the employee associated with the event, and current elections have been identified for proof, eligibility level, and default processing.
<b>Re-Enter (RE)</b>	Benefit Administrator reopened event.

The following chart describes the different types of **Process Indicator**.

Symbol	Name	Description
<b>A</b>	Assign Benefit Program	Event status must be Open. It takes the event all the way back to defining program eligibility and any data entry done in this event is lost. The system attempts to reprocess participants to PR status.
<b>E</b>	Elect Options	Event status must be Open. Schedule assignment, program assignment, and option eligibility are not reviewed or changed. The system rolls back elections from Base Benefit enrollment tables but retains them on a table. The process re-validates elections for this event and loads them, if no errors occur, back into the Base Benefit enrollment tables, resetting the final process status to FE.
<b>N</b>	Normal Processing	Standard processing for Benefits Administration.
<b>P</b>	Prepare Options	Event status must be Open. Re-evaluates Option eligibility and any data entry done in this event is lost. The system attempts to reprocess participants to PR status.
<b>R</b>	Re-Enter	Reopens the data entry page. If you need to change an election this is where it should be done. The system leaves the event at a process status of RE. When you post-election changes to the data entry component, the system updates the process status to ET.
<b>V</b>	Void	Used when an event needs to void. Do not set the Event Status to void. The system will do that when the employee is reprocessed. If the event is in a process status of FE-Enrolled, elections are rolled back from Base Benefit enrollment tables but retains them on a table. The system leaves the event at a process status of RE.



### Processing Benefit Elections: Terminated Employee

When an employee is terminated from their current Agency, a TER event is created and processed in Cardinal. The TER event will automatically be processed and finalized by the Benefit Administration process that runs each evening. If you wish to manually process these termination events, the process is listed below.

1. Once the employee's job record has been terminated in Cardinal, navigate to the **On Demand Event Maintenance** page using the following path:

**Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

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

The screenshot shows the 'On-Demand Event Maintenance' page in the Cardinal system. The left sidebar contains navigation links: 'Employee/Dependent Information', 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', 'Review BAS Activity', 'On-Demand Event Maintenance' (highlighted), and 'Update Event Status'. The main content area is titled 'On-Demand Event Maintenance' and includes a search bar with the text 'Find an Existing Value'. Below this is a 'Search Criteria' section with several input fields: 'Empl ID' (highlighted with a red box), 'Empl Record', 'Name', 'Last Name', 'Second Last Name', and 'Alternate Character Name'. Each field has a 'begins with' dropdown menu. There is also a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300):' field set to '300'. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

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





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

The screenshot shows the 'On-Demand Event Maintenance' page for JANE SMITH. The page includes a header with the Cardinal logo and a navigation bar with a back arrow and the text 'Review BAS Activity'. The main content area displays the following information:

- Activity Date:** 09/23/2023
- Source:** Job Data Change
- Person ID:** 00839776400
- Ben Record:** 0
- Empl Record:** 0
- Pending Activities:** 1
- Action:** TER
- Event ID:** 0
- Event Date:** (blank)
- Status:** (blank)
- Class:** (blank)
- Event Status:** (blank)
- Frequency:** ☒ Deduction Frequency ☐ Annual Frequency
- Entered:** 0 of 0
- Errors:** 0
- Run Date:** (blank)

The 'Schedule/Prepare Activity' button is highlighted with a red box. Other buttons visible include 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Show Plans', 'Show Errors', and 'Finalize/Apply Defaults'.

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

5. Click **OK** on the pop-up message that appears.

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

The screenshot shows the 'On-Demand Event Maintenance' page for JANE SMITH after a refresh. The page displays the following information:

- Activity Date:** (blank)
- Source:** (blank)
- Person ID:** 00839776400
- Ben Record:** 0
- Empl Record:** 0
- Pending Activities:** 0
- Action:** (blank)
- Event ID:** 4
- Event Date:** 09/23/2023
- Status:** Prepared
- Class:** TER
- Event Status:** Open for Processing
- Frequency:** ☒ Deduction Frequency ☐ Annual Frequency
- Entered:** 0 of 0
- Errors:** 0
- Run Date:** (blank)

The 'Validate/Finalize' button is highlighted with a red box. The 'Finalize/Apply Defaults' checkbox is checked. Other buttons visible include 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Confirmation Statement', 'Show Plans', 'Show Errors', 'Reprocess', 'Process Indicator' (set to N), 'Save', 'Return to Search', and 'Notify'.



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6. Click the **Finalize/Apply Defaults** check box.
7. Click **Validate/Finalize** button.

**Note:** All benefits will be terminated for the employee once the **Validate/Finalize** button has been clicked. To review the employees benefits to confirm that they have been terminated, navigate to the employees **Benefit Summary** page, or review the employees individual benefit pages (see navigations below). Remember, if the benefits termination date is in the future, the Benefit Summary page will not show future dated rows. You can see future dated rows by looking at the individual benefit pages.

Benefit Summary: **Benefits > Review Employee Benefits > Current Benefit Summary**

#### Individual Benefit Pages

Health Benefits: **Benefits > Enroll In Benefits > Health Benefits**

Simple Plan: **Benefits > Enroll In Benefits > Simple Benefits**

Imputed Life: **Benefits > Enroll In Benefits > Life and AD/D Benefits**

FSA Benefits: **Benefits > Enroll In Benefits > Spending Accounts**

Savings Benefits: **Benefits > Enroll In Benefits > Savings Plans**

Retirement Benefits: **Benefits > Enroll In Benefits > Retirement Plans**



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### Processing Benefit Elections: Transfer Out Employee

When an employee transfers out of their current Agency, an XFO event is created and processed in Cardinal. The XFO event will automatically be processed and finalized by the Benefit Administration process that runs each evening. If you wish to manually process these transfer out events, the process is listed below.

**Note:** This section does not apply to **Localities**.

1. Navigate to the **Current Benefits Summary** page using the following path:

**Benefits > Review Employee Benefits > Current Benefits Summary**

The **Current Benefits Summary Search** page displays.

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



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The **Current Benefits Summary** page displays for the applicable employee.

[< Cardinal Homepage](#)[Current Benefits Summary](#)

[Benefit Enrollment Summary](#)[Benefit Deduction Summary](#)

JANE SMITH

Employee

ID 00839776400

Benefit Record Number 0

Primary Empl Record 0

Benefits System Benefits Administration

Benefit Program SAL Salaried Employee Benefit Pgm

Benefits Status Terminated

**Current Enrollments**

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACC4	COVA EVH	Single	10/01/2022
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	09/23/2022
403(b)	Waive			Waived	10/01/2022
Section 457	Elect	457P24	457P24	\$75 Before Tax	10/01/2022
VRS Hb Vol Defined Contr	Elect	HVC000	HVC000	Employer Funded	10/01/2022
Flex Spending Medical	Elect	FLXMED	Med FSA	\$800 Pledge	07/01/2023
Flex Spending Dependent Care	Waive			Waived	07/01/2023
Employee Retirement DB	Elect	HVRMDB	VRS HB MDB	4% of Earnings	10/01/2022
Group Term Life	Elect	GTLR	GTL Reg	0% of Earnings	10/01/2022
Retiree Health Credit	Elect	RTCRRD	RHC Reg	0% of Earnings	10/01/2022
VSDP LTD	Elect	VSDPR	LTD Reg	0% of Earnings	10/01/2022
Hybrid Mandatory DC	Elect	HMC100	HMC100	1% of Earnings	10/01/2022
Health Premium Reward	Elect	PRWDEE	Par Only		08/01/2023
Flex Spending Admin Fee	Elect	FLXFEE	FSA AdmFee		10/01/2022

[Return to Search](#)[Previous in List](#)[Next in List](#)

[Benefit Enrollment Summary](#) | [Benefit Deduction Summary](#)

#### 4. Review the employee's current enrollments.

**Note:** When you process and finalize the XFO event, all benefits highlighted above will remain unchanged. All other enrollments will be terminated.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

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

**Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

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

The screenshot shows the 'On-Demand Event Maintenance' page in the 'Benefits Administrator' interface. The left sidebar contains a navigation menu with options like 'Employee/Dependent Information', 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', 'Review BAS Activity', 'On-Demand Event Maintenance' (which is highlighted), and 'Update Event Status'. The main content area is titled 'On-Demand Event Maintenance' and includes a 'Find an Existing Value' button. Below this is a 'Search Criteria' section with several input fields: 'Empl ID' (highlighted with a red box), 'Empl Record', 'Name', 'Last Name', 'Second Last Name', and 'Alternate Character Name'. Each field has a 'begins with' dropdown menu. There is also a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300):' field set to '300'. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

6. Enter the **Empl ID**.

7. Click the **Search** button.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

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

**On-Demand Event Maintenance**

JANE SMITH

Person ID 00839776400Ben Record 0

Activity Date 10/25/2023Source Job Data ChangeEmpl Record 0

Schedule/Prepare Activity

Pending Activities 1Show Activities

Action XFO

Event ID 0Event DateStatusClassEvent Status

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

Confirmation Statement

Run Date

☐ Finalize/Apply Defaults

Reprocess

Process Indicator N

Normal Processing

Save

Return to Search

Notify

- Click the **Schedule/Prepare Activity** button.
- Click **OK** on the pop-up message that appears.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

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

**On-Demand Event Maintenance**

JANE SMITH

Person ID 00839776400Ben Record 0

Activity Date

Source

Empl Record 0

Schedule/Prepare Activity

Pending Activities 0

Show Activities

Action

Event ID 5Event Date 10/25/2023Status PreparedClass XFO

Event Status Update

Prepare Options

Event Status Open for Processing

Enrollment Statement

Run Date

Frequency

☒ Deduction Frequency ☐ Annual Frequency

Election Entry

Entered 0 of 0

Show Plans

Validate/Finalize

Errors 0

Show Errors

☒ Finalize/Apply Defaults

Confirmation Statement

Run Date

Reprocess

Process Indicator N

Normal Processing

Save

Return to Search

Notify

10. Click the **Finalize/Apply Defaults** checkbox option.

11. Click the **Validate/Finalize** button.

**Note:** Savings and Retirement plans will be terminated for the employee once the **Validate/Finalize** button is clicked. All other plan enrollments will remain unchanged.



## **Benefits Quick Reference Guide Job Aid**

### **BN361 Benefit Enrollment and Maintenance**

To review the employees benefits after the XFO event has been finalized, navigate to the employee's **Current Benefits Summary** page or review the employee's individual benefit pages (see navigations below). A screenshot has been provided of our sample employee's benefit summary on the next page for your review. Remember, if the benefits termination date is in the future, the **Current Benefits Summary** page will not show future dated rows. You can see future dated rows by looking at the individual benefit pages.

Current Benefits Summary: **Benefits > Review Employee Benefits > Current Benefit Summary**

#### Individual Benefit Pages

Health Benefits: **Benefits > Enroll In Benefits > Health Benefits**

Simple Plan: **Benefits > Enroll In Benefits > Simple Benefits**

Imputed Life: **Benefits > Enroll In Benefits > Life and AD/D Benefits**

FSA Benefits: **Benefits > Enroll In Benefits > Spending Accounts**

Savings Benefits: **Benefits > Enroll In Benefits > Savings Plans**

Retirement Benefits: **Benefits > Enroll In Benefits > Retirement Plans**





# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

Benefit Enrollment Summary

Benefit Deduction Summary

JANE SMITH

Employee

ID 00839776400

Benefit Record Number 0

Primary Empl Record 0

Benefits System Benefits Administration

Benefit Program SAL Salaried Employee Benefit Pgm

Benefits Status Terminated With Benefits

Current Enrollments

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACC4	COVA EVH	Single	10/01/2022
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	09/23/2022
403(b)	Terminate				10/25/2023
Section 457	Terminate				10/25/2023
VRS Hb Vol Defined Contr	Terminate				11/01/2023
Flex Spending Medical	Elect	FLXMED	Med FSA	\$800 Pledge	07/01/2023
Flex Spending Dependent Care	Waive			Waived	07/01/2023
Employee Retirement DB	Terminate				11/01/2023
Group Term Life	Terminate				11/01/2023
Retiree Health Credit	Terminate				11/01/2023
VSDP LTD	Terminate				11/01/2023
Hybrid Mandatory DC	Terminate				11/01/2023
Health Premium Reward	Elect	PRWDEE	Par Only		08/01/2023
Flex Spending Admin Fee	Elect	FLXFEE	FSA AdmFee		10/01/2022

Return to Search

Benefit Enrollment Summary | [Benefit Deduction Summary](#)



### Processing Benefit Elections: Transfer In Employee

When an employee transfers into a new Agency, the receiving Benefits Administrator will ensure that the Transfer In process has been done correctly and with as little disruption to the employee as necessary. To do this they must do the following:

- Review the transferring employee's current benefit enrollments to ensure the following:
  - Health, Premium Reward, FSA Plans, FSA Fee, and Imputed Life have not been terminated by the prior Agency
  - Retirement and Savings Accounts all show terminated as of the 1<sup>st</sup> of the month following transfer
- Ensure the employees VNAV Record is established in a timely manner by monitoring the VNAV Cancel Records Report daily and manually loading the job information into VNAV if necessary
- Inform the transferring employee they will need to reenroll in the Annuity/Deferred Compensation plans. (It is the employee's responsibility to do so).

**IMPORTANT NOTE:** As of November 20, 2023, the process of establishing a transfer employee's benefits has changed and this Job Aid has been updated to reflect that the receiving agency BA no longer needs to reelect the employee's health, premium reward, imputed income, flex spending, or flex fee plans.

**Note:** Generally, the employee cannot request any changes to health and flex spending enrollments due to transfer. If you have questions about changes the employee is requesting and if they are allowed, please reach out to the Office of Health Benefits (OHB).

**Note:** This section does not apply to **Localities**.



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### Reviewing your Transfer Employees Benefit Enrollment Record

1. Navigate to the **Current Benefits Summary** page using the following path:

**Benefits > Review Employee Benefits > Current Benefits Summary**

**Hint:** If the transfer benefit changes you are reviewing are future dated, the benefits summary will not show you the changes as it only shows the employees benefits as of today's date. If you need to review future dated benefits look up each benefit individually and skip to step 4.

#### Individual Benefit Pages

Health Benefits: **Benefits > Enroll In Benefits > Health Benefits**

Simple Plan: **Benefits > Enroll In Benefits > Simple Benefits**

Imputed Life: **Benefits > Enroll In Benefits > Life and AD/D Benefits**

FSA Benefits: **Benefits > Enroll In Benefits > Spending Accounts**

Savings Benefits: **Benefits > Enroll In Benefits > Savings Plans**

Retirement Benefits: **Benefits > Enroll In Benefits > Retirement Plans**

The **Current Benefits Summary Search** page displays.

< Cardinal Homepage Current Benefits Summary

**Current Benefits Summary**  
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

☐ Case Sensitive

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

Search Clear Basic Search



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

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

The **Current Benefits Summary** page displays for the applicable employee.

Benefit Enrollment Summary

Benefit Deduction Summary

JANE SMITH

Employee

ID 00839776400

Benefit Record Number 0

Benefits System

Benefits Administration

Benefit Program

SAL Salaried Employee Benefit Pgm

Benefits Status

Terminated With Benefits

Primary Empl Record 0

Current Enrollments

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACC4	COVA EVH	Single	10/01/2022
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	09/23/2022
403(b)	Terminate				10/25/2023
Section 457	Terminate				10/25/2023
VRS Hb Vol Defined Contr	Terminate				11/01/2023
Flex Spending Medical	Elect	FLXMED	Med FSA	\$800 Pledge	07/01/2023
Flex Spending Dependent Care	Waive			Waived	07/01/2023
Employee Retirement DB	Terminate				11/01/2023
Group Term Life	Terminate				11/01/2023
Retiree Health Credit	Terminate				11/01/2023
VSDP LTD	Terminate				11/01/2023
Hybrid Mandatory DC	Terminate				11/01/2023
Health Premium Reward	Elect	PRWDEE	Par Only		08/01/2023
Flex Spending Admin Fee	Elect	FLXFEE	FSAAdmFee		10/01/2022

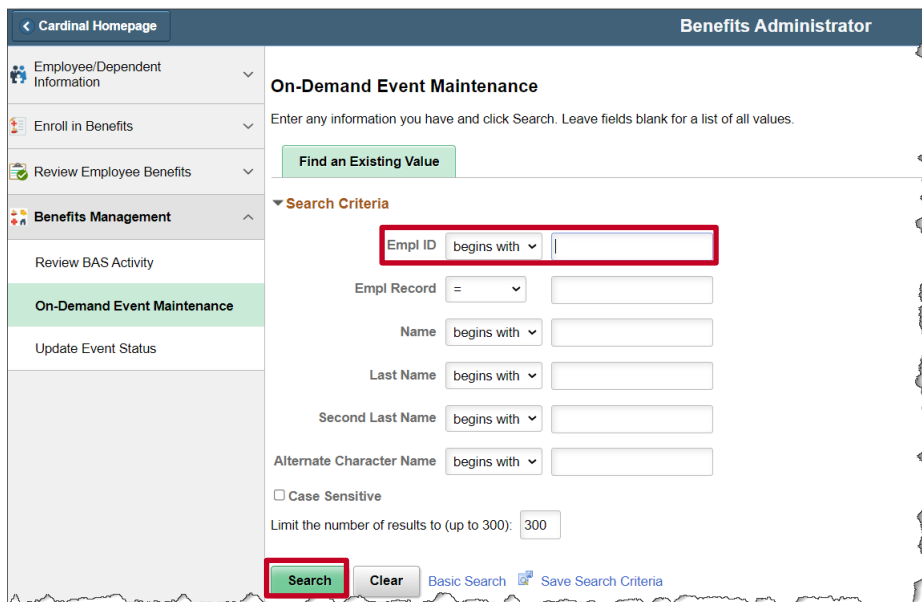
Return to Search

Previous in List

Next in List

Benefit Enrollment Summary | [Benefit Deduction Summary](#)

4. Review the employees benefit summary/individual event pages to ensure that only the retirement and savings plans have a Coverage Election of "Terminate".
  - a. Are All Benefits Terminated? If all benefits have been terminated, it indicates that the employee's prior Agency used the incorrect Action Reason when terminating the employee. A PPS ticket will be needed to fix this issue
  - b. Are None of the Benefits Terminated? If none of the benefits have been terminated, it indicates that either the employee's prior Agency has not entered the employees transfer out, or did so after your HR dept entered the transfer in. A PPS ticket will be needed to fix this issue.
5. Review the employees' healthcare enrollment and note if the employee is enrolled in a regional HMO plan (Kaiser or Optima).
6. Once you have fully reviewed the employees benefits and have determined that the Savings and Retirement are terminated, and no changes have been made to the Health, FSA, Imputed Life, and Premium Reward plans, then you can proceed to the **On Demand Event Maintenance** page to finalize the XFR Benefit Event.
7. Navigate to the **On Demand Event Maintenance** page using the following path:  
**Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**  
 The **On-Demand Event Maintenance Search** page displays.



8. Enter the **Empl ID**.
9. Click the **Search** button.



## **Benefits Quick Reference Guide Job Aid**

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### **BN361 Benefit Enrollment and Maintenance**



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

The **On-Demand Event Maintenance** page displays for the applicable employee.

#### On-Demand Event Maintenance

**JANE SMITH**

Person ID00839776400Ben Record0

Activity Date09/25/2023SourceJob Data ChangeEmpl Record1

Schedule/Prepare Activity

Pending Activities1

Show Activities

ActionXFR

Event ID0Event DateStatusClass

Prepare Options

Enrollment Statement

Run Date

Event Status

Frequency

☒ Deduction Frequency☐ Annual Frequency

Election Entry

Entered0 of 0

Show Plans

Validate/Finalize

Errors0

Show Errors

Confirmation Statement

Run Date

☐ Finalize/Apply Defaults

Reprocess

Process IndicatorN

Normal Processing

Save

Return to Search

Previous in List

Next in List

Notify

- Click the **Schedule/Prepare Activity** button.
- Click **OK** on the pop-up message that appears.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

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

12. If the Employee was enrolled in a regional HMO plan, then you will need to click the **Election Entry** button so you can confirm if the employee is still eligible for the HMO plan. Otherwise, proceed to the next step.

**Note:** If your transferring employee is enrolled in an HMO, you must click on the **Election Entry** button to ensure they did not lose benefits. If you do not see the HMO in the list of available options for the employee, you will need to reach out to the employee to let them know. They will need to fill out a new enrollment form and select a new plan. Once they have made their decision, you can enroll them using the XFR Benefit Event.

13. Click the **Finalize/Apply Defaults** checkbox option.

14. Click the **Validate/Finalize** button.

To review the employees benefits after the XFR event has been finalized, navigate to the employees **Current Benefits Summary** page or review the employees individual benefit pages (see navigations below. Remember, if the benefits enrollment/termination dates is in the future, the **Current Benefits Summary** page will not show future dated rows. You can see future dated rows by looking at the individual benefit pages.





## **Benefits Quick Reference Guide Job Aid**

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### **BN361 Benefit Enrollment and Maintenance**

Benefit Summary: **Benefits > Review Employee Benefits > Current Benefit Summary**

Individual Benefit Pages

Health Benefits: **Benefits > Enroll In Benefits > Health Benefits**

Simple Plan: **Benefits > Enroll In Benefits > Simple Benefits**

Imputed Life: **Benefits > Enroll In Benefits > Life and AD/D Benefits**

FSA Benefits: **Benefits > Enroll In Benefits > Spending Accounts**

Savings Benefits: **Benefits > Enroll In Benefits > Savings Plans**

Retirement Benefits: **Benefits > Enroll In Benefits > Retirement Plans**



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### 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 appears.

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 **Search Results** display on the bottom portion of the page.

Empl ID	Name	Last Name	Middle Name	Benefit Record Number	Business Unit	Department	Organizational Relationship
			D	0	21500	302032	Emp

4. Click on the **Empl ID** link.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

The **Benefits Personal Data** page for the applicable employee displays.

Process List Benefits Personal Data

Benefits Personal Data

Person ID

Benefits Personal Data

Highly Compensated Employee

\*Highly Compensated Last Year Not Eligible for the Plan

Benefits Personal Data - Date Sensitive

Effective Date

Medicare Number

Alternate Medicare Number

Medicare Reason A

Medicare Reason B

Medicare Reason D

HIPAA Medicare Elig Reason

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

5. Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field.
6. Check the **Select** checkbox options next to Medicare A and Medicare B.  
**Note:** Both need to be checked for the employee to be enrolled in Medicare.
7. Select the corresponding **HIPAA Medicare Elig Reason**:
  - a. Age
  - b. Disability
  - c. End Stage Renal Disease
8. Click the **Save** button.



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### The Employee Event Detail Page

To view relevant details related to the nature and status of a Benefit Event, the Agency BA would access the **Employee Event Details** page.

1. Navigate to the **Employee Events Details** page using the following path:

**Navigator > Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail**

The **Employee Event Detail Search** page displays.

2. Enter the Schedule ID in the **Schedule ID** field.
3. Click the **Search** button.

**Note:** Numerous Benefit Events can occur simultaneously, all in varying points in the process and with different statuses.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

The **Employee Event Detail Search** page returns with the search results on the bottom of the page.

**Employee Event Detail**

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

[Find an Existing Value](#)

**Search Criteria**

Schedule ID

Empl ID

Benefit Record Number

Event Identification

Benefit Program

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

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

Search Results

Only the first 300 results can be displayed.

[View All](#) 1-100 of 300

Schedule ID	Empl ID	Benefit Record Number	Event Identification	Benefit Program	Event Classification	Event Status	Process Status	Event Date
<a href="#">EM00</a>		0	1	SAL	DCH	Open	Entered	08/22/2020
EM00		0	1	SAL	BIR	Closed	Enrolled	08/03/2020
EM00		0	2	SAL	BEN	Closed	Enrolled	08/20/2020
EM00		0	1	SAL	BIR	Closed	Enrolled	08/03/2020

**Note:** When entering a **Schedule ID** on the **Employee Event Detail** search page, all associated events will reflect in the Search Results. (Alternatively, the Empl ID of a specific individual can be entered.) The data can be ordered by clicking on the results headers such as Event Classification, Event Status, Process Status, or Event Date.

- Click on the **Schedule ID** link.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

The **Employee Event Detail** page displays with the **Participant** tab displayed.

**BenAdmin Processing Controls** **Employee Event Detail**

**Participant** Plan Type Option and Cost

Sched ID EM00 Event Maintenance  
Empl ID  Benefit Record 0

**Event Information**

ID 2	Empl Record 1
Status Closed to Processing	Date 08/25/2020
Class HIR Initial Enrollment	Effseq 0
Source Job Data Change	Priority 100
<input type="checkbox"/> Multi-Activity Indicator	

**Eligibility Information**

Empl Record 1
COBRA Action
Addr Effdt 06/01/1992
Job Effdt 08/25/2020
Effseq 0

**Processing Information**

Benefit Program SAL Salaried Employee Benefit Pgm	<input type="checkbox"/> Address Eligibility Changed
Process Status Finalized - Enrolled	<input type="checkbox"/> MultiJob Indicator Changed
Status Date 09/16/2020	<input type="checkbox"/> Job Eligibility Changed
Process Indicator Assign Benefit Program	<input type="checkbox"/> Event Out of Sequence
Election Source None Entered	<input type="checkbox"/> Event Disconnected
Excess Credit Forfeit Excess Credits	<input checked="" type="checkbox"/> Available through Self Service
Option Notify	<input type="checkbox"/> Finalize/Apply Defaults
Confirm Notify	
Suppress Forms Print Both Forms	Enrl/Print Days 0

**Eligibility Source**

**Note:** The **Participant** tab reflects Event information such as the date and class of the event, eligibility information such as any associated COBRA action related to this event, Processing information such as the event Process Status and the Election Source, and eligibility source information related to the Address or Job records that may have relevance to benefit eligibility.

5. Review the information under the **Processing Information** section. There are a series of checkboxes or “flags” that reflect the type of change made to an employee’s data that may impact benefits eligibility. The Agency BA must view the information shown under this section and interpret what each possible “flag” means.
  - a. **Job or Address Eligibility Changed:** The system flags these events when the HR data used for processing event eligibility is changed, a new row affecting eligibility is inserted, or the row used for eligibility is deleted
  - b. **Event Out of Sequence:** The **Event Out of Sequence** flag refers to events that have been processed out of order according to their effective date or priority. An Out of Sequence event might need to be reprocessed because an earlier, opened event might have changed the defaults, eligibility, or event rule processing results for the later, closed event
  - c. **Event Disconnected:** The **Event Disconnected** flag generally refers to open or closed events based on job rows that have been deleted. It can also refer to an open event where the BAS Group ID has been changed



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### Searching for Benefit Events

To search for specific benefit events, the BA must navigate to the **Update Processing Controls** page.

1. Navigate to the **Update Processing Controls** page using the following path:

**Navigator > Benefits > Manage Automated Enrollment > Events > Update Processing Controls**

The **Update Processing Controls Search** page displays.

2. Enter the **Schedule ID** or **Empl ID** in the applicable Required Search Field.
3. Enter Optional Search criteria, when appropriate, in the applicable **Optional Search Fields** section. If there are no Optional Search criteria, proceed to Step 4.

Under the **Optional Search Fields** section, there are several search options with specific characteristics useful for an Agency BA to be able to search for items such as Open events with an Event Out of Sequence flag. This can be helpful to identify, review, and address specific scenarios.

**Note:** For the **Event Status** field, refer to the [Event Status: Working with Events](#) section of this Job Aid for more information on flags and status indicators that provide processing information for a particular event.

4. Click the **Search** button.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

The **Update Processing Controls** page displays. All events which meet the criteria from the search are displayed.

**Update Processing Controls**

Search Results

Sched ID	Empl ID	Ben Record	Event Date	Event Class	Event ID	Pgm	Event Status
EM00		0	01/25/2021	Init Hire	3	SAL	Open
Process Status: Prepared							
*Process Indicator: Assign Benefit Program							
Suppress Forms: Print Both Forms							
<input type="checkbox"/> Addr Elig Chg <input type="checkbox"/> MultJobChg <input type="checkbox"/> Job Elig Chg							
<input type="checkbox"/> Event Out of Sequence <input type="checkbox"/> Disconnected <input type="checkbox"/> Final/Dfit							
EM00		1	09/16/2020	Init Hire	1	RET	Open
Process Status: Prepared							
*Process Indicator: Normal Processing							
Suppress Forms: Print Both Forms							
<input type="checkbox"/> Addr Elig Chg <input type="checkbox"/> MultJobChg <input type="checkbox"/> Job Elig Chg							
<input type="checkbox"/> Event Out of Sequence <input type="checkbox"/> Disconnected <input checked="" type="checkbox"/> Final/Dfit							

Return To Search

Save Notify

**Note:** Typically, the Benefit Administrator would determine if a flag can be removed or if an event needs to be set for reprocessing. When Benefits Administration runs in batch, each event will be processed in the same manner as if the entry was performed on the **On-Demand Event Maintenance** page and manually processed. The Employee Process Status Report will also provide a list of all employees in a schedule with process statuses, but the Agency BA cannot select on the flag indicator values.





# Benefits Quick Reference Guide Job Aid

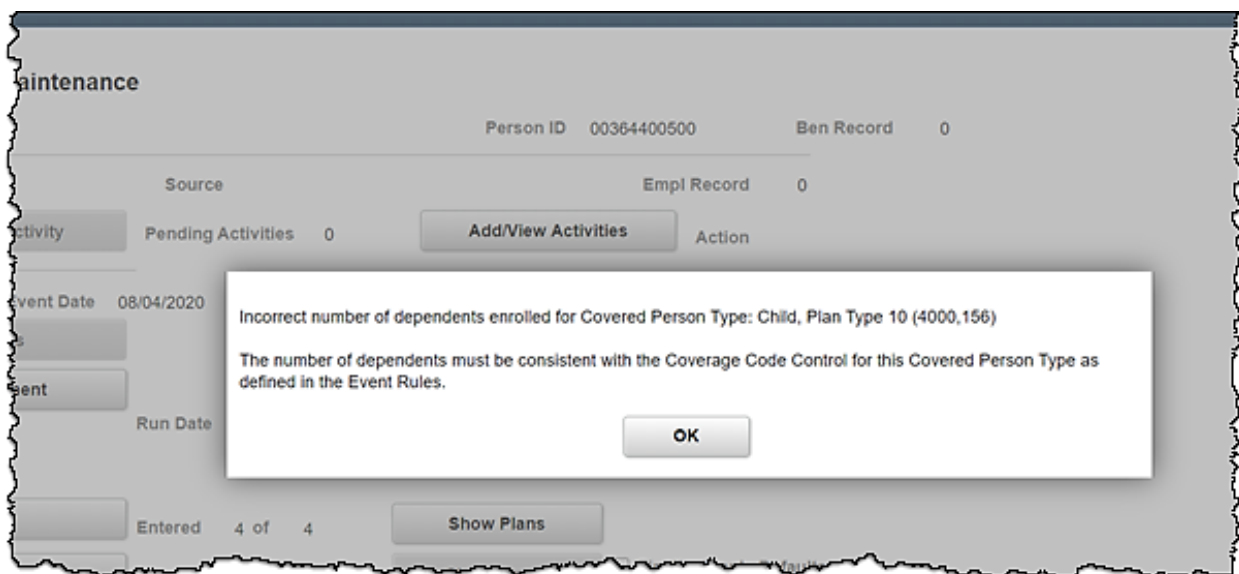
## BN361 Benefit Enrollment and Maintenance

### Troubleshooting Errors

The screen shots that follow reflect a few of the most commonly experienced error messages along with a description of the information presented and possible corrective actions.

- **Error Message:** Incorrect number of dependents enrolled for Covered Person Type: Child, Plan Type 10. The number of dependents must be consistent with the Coverage Code Control for this Covered Person Type as defined in the Event Rules.

This is an example of a message that displays when an action to add or remove a dependent is not permitted by plan rules. For example, the child enrolled under an Employee + Child coverage is removed from coverage, but the coverage level is unchanged.



- **Error Message:** Dependent 03 exceeds the maximum age for a non-student (Plan Type 10). The individual shown as attained the maximum age for which they may be covered under this plan while in a Non-Student status. Please remove this dependent from coverage, or change the Benefit Program rules, regarding non-student status.

This is an example of a message that appears when an over-age dependent is covered. The overage dependent should remain covered. State policy allows the dependent age 26 to remain covered until the end of the year that he/she turns 26. For example, while processing a mid-year life event like a divorce, if there is a dependent age 26 covered, this message will appear when trying to finalize the event. After finalizing an event, the BA may need to double check the Base Benefits to ensure that the over-age dependent is still listed as enrolled.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

Dependent 03 exceeds the maximum age for a non-student (Plan Type 10). (4000,100)

The individual shown has attained the maximum age for which they may be covered under this plan while in a Non-Student status. Please remove this dependent from coverage, or change the Benefit Program rules regarding non-student status.

OK

☒ Deduction Frequency ☐ Annual Frequency

- **Error Message:** A person of type Child cannot be enrolled under the select Coverage Code (Plan Type 10). You have chosen a coverage code for which this type of coverage is not allowed. Please delete the elected dependent row for persons of this type or update the coverage code (option code) to a value which allows coverage for this type of persons.

This message displays when an action to add a dependent is not permitted by plan rules. For example, the Employee Only coverage is selected, yet a child is listed as a dependent. See view of the Dependent/Beneficiary enrollment that follows.

Activities 0 Add/View Activities Action

A person of type Child cannot be enrolled under the selected Coverage Code (Plan Type 10). (4000,154)

You have chosen a coverage code for which this type of coverage is not allowed. Please delete the elected dependent row for persons of this type or update the coverage code (option code) to a value which allows coverage for this type of persons.

OK

5 of 5 Show Plans

Plan Type 10 : Medical

Option Code 1 COVA HthAwr + Prev Den (CHA) (Single)

Health Provider ID  ☐ Previously Seen

[Special Requirements](#)

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

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



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

- **Error Message:** This eligibility data has changed between benefit program assignment and option processing phases. Review the participant's HR data to determine if reprocessing is required.

This message typically displays when a change was made to a person's Job record between when the event was initially created and the time it is processed through Benefit Administration that may have affected the original evaluation for benefit eligibility. Typically, this would lead to the Benefit Administrator (BA) performing a re-assignment of the Benefit Program followed by benefit enrollment actions. If desired, the BA can work with the Human Resource unit to discuss the changes to the Job and determine if re-assignment is necessary.

The screenshot shows a web application window titled "On Demand EM - Error Messages". At the top right, there are fields for "Person ID:", "Event ID:", and "Ben Rcd#:". Below these is a "Messages" section with a "Find | View All" button and a pagination indicator "First 1 of 1 Last". The main content area displays a message with the following details:

Message ID:	Option ID:	Cost ID:
000328		

**Description:** The eligibility data has changed between benefit program assignment and option processing phases. Review the participant's HR data to determine if reprocessing is required. (MSGData1: Job Elig Chg, MSGData2: Primary Job Chg, MSGData3: Addr Elig Chg)

**Message Data:**

Y
N
N



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### Voiding Events

At times, an event is no longer needed and needs to be voided. Typically, events are voided if the employee submitted the wrong event date, benefits keyed the wrong event date, or the event is disconnected. To have an event voided, contact OHB.

**BenAdmin Event Status Update** ×

**Update Event Status**

Empl ID 87T00000101 Sample 01 T05BN1902 Ben Record 0

Event Status Update ?

Schedule ID EM00  
Event Date 02/01/2020  
Event ID 3  
Event Class TER Termination  
Event Priority 400  
Benefit Program SAL  
Process Status Prepared  
Action Source Job Data Change

☐ Event Disconnected

☐ Address Eligibility Changed  
☐ MultiJob Indicator Changed  
☐ Job Eligibility Changed  
☐ Event Out of Sequence  
☐ Finalize/Apply Defaults

Print Option Print Confirmation Forms Only  
\*Process Normal Processing  
\*Event Status Void



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### Disconnected Events

If a Job row is deleted, the associated Benefit Event becomes disconnected. If a Benefit Event is disconnected before it is finalized, the Benefit Administration process will automatically close the event. However, if the event is already finalized, research is required to determine if that event should be voided.

1. To view disconnected events, access the **On-Demand Event Maintenance** page using the following path:

**Benefits Administrator Tile > Benefits Management > On-Demand Event Maintenance**

**Note:** See steps 1-4 of the [On-Demand Event Maintenance Page](#) section for details on entering and selecting the Employee ID. The screenshot on step 4 also displays the **Event Status Update** button.

2. Click the **Event Status Update** button to view the disconnected events.

The **BenAdmin Event Status Update** page displays.

The screenshot shows the 'BenAdmin Event Status Update' page. The sidebar on the left contains the following links: Cardinal Homepage, Employee/Dependent Information, Enroll in Benefits, Review Employee Benefits, Benefits Management, Review BAS Activity, On-Demand Event Maintenance, and Update Event Status. The main content area is titled 'Update Event Status' and includes an 'Empl ID' field and a 'Ben Record' count of 0. Below this is a table of event details for two events. The first event has Schedule ID J21A, Event Date 07/01/2021, Event ID 0, Event Class OE (Open Enrollment), Event Priority 900, Benefit Program SAL, Process Status Finalized - Benefit Pgm None, and Action Source Open Enrollment. The second event has Schedule ID EM00, Event Date 09/29/2020, Event ID 1, Event Class BIR (Birth or Adoption), and Action Source Open Enrollment. Both events have an 'Event Disconnected' checkbox checked. To the right of the event details are several checkboxes for status updates: Address Eligibility Changed, MultiJob Indicator Changed, Job Eligibility Changed, Event Out of Sequence, and Finalize/Apply Defaults. There are also dropdown menus for 'Print Option' (set to 'Print Confirmation Forms Only'), '\*Process' (set to 'Normal Processing'), and '\*Event Status' (set to 'Open for Processing').

Event ID	Schedule ID	Event Date	Event Class	Event Priority	Benefit Program	Process Status	Action Source	Event Disconnected	Address Eligibility Changed	MultiJob Indicator Changed	Job Eligibility Changed	Event Out of Sequence	Finalize/Apply Defaults
0	J21A	07/01/2021	OE Open Enrollment	900	SAL	Finalized - Benefit Pgm None	Open Enrollment	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1	EM00	09/29/2020	BIR Birth or Adoption					<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### Flagged Events

The Benefits Administration program identifies changes in Job and Personal Data which can impact eligibility for an event created prior to that change. These events then become “flagged events” with the associated flags marked to indicate benefit eligibility must be reevaluated. The most common flags seen are **Address Eligibility Changed**, **Job Eligibility Changed**, and **Event Out of Sequence**.

The Flagged Participants Report, (BAS008) identifies employees with flagged events. If an event has not yet reached Prepared status and one or more of the eligibility flags are set, then the event will get set back to Assign Program before any further processing on this event occurs. If Prepared, the options and elections already entered will be reevaluated upon the next execution of Benefits Administration.

Example of a flagged event on the **BenAdmin Event Status Update** page:

The screenshot shows the 'BenAdmin Event Status Update' window. It contains two event entries. The first event (Event ID 1) has the following details: Schedule ID EM00, Event Date 12/13/2019, Event Class HIR Initial Enrollment, Event Priority 100, Benefit Program SAL, Process Status Prepared, and Action Source Job Data Change. The flags 'Job Eligibility Changed' and 'Event Out of Sequence' are checked. The second event (Event ID 4) has the following details: Schedule ID EM00, Event Date 12/01/2019, Event Class MSC Misc Job Change, Event Priority 120, Benefit Program SAL, and Action Source Job Data Change. The flag 'Event Disconnected' is checked. Both events have the 'Print Both Forms' option selected.

- A change to the Job record with an effective date of 12/01/2019 impacts the eligibility for the employee's 12/13/2019 event. Therefore, the **Job Eligibility Change flag** and **Event Out of Sequence** boxes are **checked**.
  - The flag checkboxes display *on the event that must be reevaluated*, not the row that caused the change.
  - Benefits Administration will automatically reprocess the flagged event. Once reprocessed, both the **Job Eligibility Change** and **Out of Sequence Flags** are **unchecked**.



## Benefits Quick Reference Guide Job Aid

### BN361 Benefit Enrollment and Maintenance

- The following are the three most common types of flags seen by the Agency BA.
  - The **Address Eligibility Changed** checkbox will become checked when an update is made to the employee's address in Personal Information and eligibility must be reevaluated.
  - The **Job Eligibility Changed** checkbox reflects that Job information initially used in determining benefits eligibility has been changed. The Job Eligibility Changed checkbox will become checked when the Job row for which the event is based on has been corrected or when a new row is inserted into the Job record with an Effective Date prior to an existing Event Date.
  - The **Event Out of Sequence** checkbox refers to an event that has been processed out of order according to its effective date or priority. It will become checked when another event is created with an Event Date prior to the Effective Date of the event that already exists (regardless of the process status of the existing row). These may be retroactive, current, or future rows that have an event date that precedes that of an existing event. This is often seen after Open Enrollment (OE). For example, a Birth Event was entered effective June 15 after the employee had completed enrollment for OE that is effective July 1. The Event Out of Sequence Flag would be checked on the OE event because a review is required to determine if the baby is to be added to the OE enrollment.



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### How to Review Benefit Statements

To review an employee's benefit statements the Agency BA can access the **Review Employee Statements** page.

1. Navigate to the **Review Employee Statements** page using the following path:

**Benefit Administrator Tile > Review Employee Benefits > Review Employee Statements**

The **Review Employee Statements Search** page displays.

The screenshot shows the 'Benefits Administrator' interface. On the left is a navigation menu with options: 'Employee/Dependent Information', 'Enroll in Benefits', 'Review Employee Benefits' (expanded), 'Current Benefits Summary', 'Savings Plans', 'Approve Document Upload', 'Review Employee Statements' (highlighted), 'Benefits Management', and 'Benefits Configuration'. The main content area is titled 'Review Employee Statements' and contains a 'Search Options' section. This section has four input fields: 'Employee ID (begins with)', 'Empl Record =', 'Name (begins with)', and 'Last Name (begins with)'. The first and last fields are highlighted with red boxes. Below these fields are 'Search' and 'Clear' buttons, with the 'Search' button also highlighted with a red box.

2. Enter the **Employee ID** or **Last Name** in the applicable search fields.
3. Click the **Search** button.

The **Review Employee Statements Search** page returns and displays results on the bottom of the page.





# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

Homepage Benefits Administrator

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Current Benefits Summary

Savings Plans

Approve Document Upload

Review Employee Statements

Benefits Management

Benefits Configuration

Review Employee Statements

Search Options

Employee ID (begins with)

Empl Record =

Name (begins with)

Last Name (begins with) Harmon

Search Clear

Select Employees

Name / Title	Employee ID	Empl Record
		0
		0
		0
		0
		1
		0
		0
		0
		0
		0

- Select the row for the appropriate employee/participant.

The **Review Employee Statements** page displays for the employee/participant selected.

Back Benefits Administrator

Employee/Dependent Information

Enroll in Benefits

Review Employee Benefits

Current Benefits Summary

Savings Plans

Approve Document Upload

Review Employee Statements

Benefits Management

Benefits Configuration

Review Employee Statements

Statement Type

Person ID 00900004600

Benefit Record 0

Event Date	Issue Date	Seq	Enrollment Event	Statement Type
11/10/2019	07/09/2020	0	Event Maintenance	Confirmation Statement
04/25/2020	07/09/2020	0	Event Maintenance	Confirmation Statement


- Select the Statement desired to view and/or print from the **Statement Type** field drop-down menu.
- Select the specific Statement row to view and/or print from the list that displays.



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

The Statement selected displays.

**University of Mary Washington**  
Salaried Employee Benefit Pgm

**CONFIRMATION OF 2020 ELECTIONS**  
EVENT MAINTENANCE  
Statement Issue Date: 09/11/2020  
Enrollment Effective Date: 06/20/2020

Employee ID

Employee ID:

This statement confirms your recent benefit elections. These coverages will remain in effect until you experience a change in family status or in your employment situation. If an error has been made in recording your elections, please contact your benefits administrator. Please keep a copy of this form for your records.

**PERSONAL INFORMATION**

Home Address

123 Main Street , Richmond, VA 23230

Email Address

yyyldfjdl@doa.virginia.gov

Gender

Male

Marital Status

Married

Birthdate

1978-08-16

**ELECTION SUMMARY**

Benefit	Coverage	Category Base	Your Cost Per Pay Period
COVA Care + Prev Dental	Family		\$ 143.50
Flex Spending Medical			
Flex Spending Dependent Care			
Health Premium Reward			
Flex Spending Admin Fee			

\*Cost Reflected above are per pay period for agencies paid by the cardinal system, monthly for all others

**HEALTH DEPENDENTS**

Name	Date of Birth	Relationship	Dependent Benefit Type
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7. Review the statement and print, as applicable.



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

### Invalid Elections Report

To review invalid elections, the Agency BA will access the Invalid Elections report.

1. Navigate to the **Invalid Elections** report using the following path:

**Navigator > Benefits > Manage Automated Enrollment > Investigate Exceptions > Invalid Elections Rpt**

The **Invalid Elections Rpt Search** page displays.

2. Enter the Run Control ID in the **Run Control ID** field.

**Note:** For more information on running reports, see the resource titled **Cardinal Reports Catalog**. This Job Aid can be found on the Cardinal website in **Resources** under **Learning**.



# Benefits Quick Reference Guide Job Aid

## BN361 Benefit Enrollment and Maintenance

The **Invalid Elections Report** page displays.

**Invalid Elections Rpt**

Run Control ID Is Report Manager Process Monitor **Run**

Language English

Schedule ID  (Leave blank for all schedules)

Save Return to Search Notify Add Update/Display

3. Enter the **Schedule ID**.

**Note:** The **Invalid Elections Report** should be run routinely and more frequently during **Open Enrollment**. This can be run for an individual **Schedule ID** or for all Schedule IDs by leaving the field blank. Separate schedule IDs will be created for ongoing maintenance and Open Enrollment.

4. Click **Run**.

The **BenAdmin Preparation and Elections Errors** report will display if there are errors.

PeopleSoft									
BenAdmin Preparation and Election Errors									
Report ID: BAS003								Page No. 1	
								Run Date 04/27/2020	
								Run Time 16:09:01	
Sched ID	Employee ID	Event ID	Optn ID	Cost ID	Msg-ID	Error Message Description			Message-Data 1/2/3
	0	0	0	0	000327	Valid data from various tables (including Job and Pers_Data_Effdt) could not be found in effect as of the Event Date. There are many possible causes for this. Rows existing at the time of this event may have been subsequently deleted. The Event Date may pre-date all effective-dated rows in critical HR tables.			1: 2019-11-23
						If Multiple Jobs is enabled, this can occur if the primary job for this Benefit Record has its Benefit System flag set to something other than (BA) "Benefits Administration", as of			2: 000
									3: TJ
	0	0	0	0	000327	Valid data from various tables (including Job and Pers_Data_Effdt) could not be found in effect as of the Event Date. There are many possible causes for this. Rows existing at the time of this event may have been subsequently deleted. The Event Date may pre-date all effective-dated rows in critical HR tables.			1: 2019-07-23
						If Multiple Jobs is enabled, this can occur if the primary job for this Benefit Record has its Benefit System flag set to something other than (BA) "Benefits Administration", as of			2: 000
									3: TJ
	0	0	0	0	000327	Valid data from various tables (including Job and Pers_Data_Effdt) could not be found in effect as of the Event Date. There are many possible causes for this. Rows existing at the time of this event may have been subsequently deleted. The Event Date may pre-date all effective-dated rows in critical HR tables.			1: 2019-10-26
						If Multiple Jobs is enabled, this can occur if the primary job for this Benefit Record has its Benefit System flag set to something other than (BA) "Benefits Administration", as of			2: 000
									3: TJ
	0	0	0	0	000155	No Schedule could be found to process a new event. A Schedule-Id must exist that matches the employee's Company and BAS-Group-ID. (MSGData1: Company; MSGData2: BAS-Group-ID)			1: DOA
	0	0	0	0	000327	Valid data from various tables (including Job and Pers_Data_Effdt) could not be found in effect as of the Event Date. There are many possible causes for this. Rows existing at the time of this event may have been subsequently deleted. The Event Date may pre-date all effective-dated rows in critical HR tables.			1: 2019-11-23
						If Multiple Jobs is enabled, this can occur if the primary job for this Benefit Record has its Benefit System flag set to something other than (BA) "Benefits Administration", as of			2: 000
									3: TJ



## **Benefits Quick Reference Guide Job Aid**

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### **BN361 Benefit Enrollment and Maintenance**

**Note:** Once the messages are resolved, when the Ben Admin process runs again, the system will pick up the changes, validate the record again, and close or continue processing the event.

For more information on running reports, see the Job Aid titled NAV225\_Generating an HCM Report. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.