Managing BA Contacts Overview

This Job Aid provides the steps utilized by Agency Benefits Administrators to manage the BA Contacts for their Business Unit/Group ID(s). It is critically important that the BA Contacts are maintained accurate within Cardinal. When employees make changes via Employee Self-Service (ESS), a notification is sent to the Benefits Administrator Contact Type.

Note: Cardinal recommends using a shared email address or distribution list to allow for notifications to be sent to a broader group of individuals. This Job Aid contains sections that provide the step-by-step instructions used to complete the following:

· Add a new BA Contact

· Edit an existing BA Contact

· Delete an existing BA Contact

This Job Aid does not apply to Agencies participating in The Local Choice Health Benefits Program (TLC). Localities enrolled in TLC should refer to the Job Aid titled **BN361_TLC Data Sheet Locality**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

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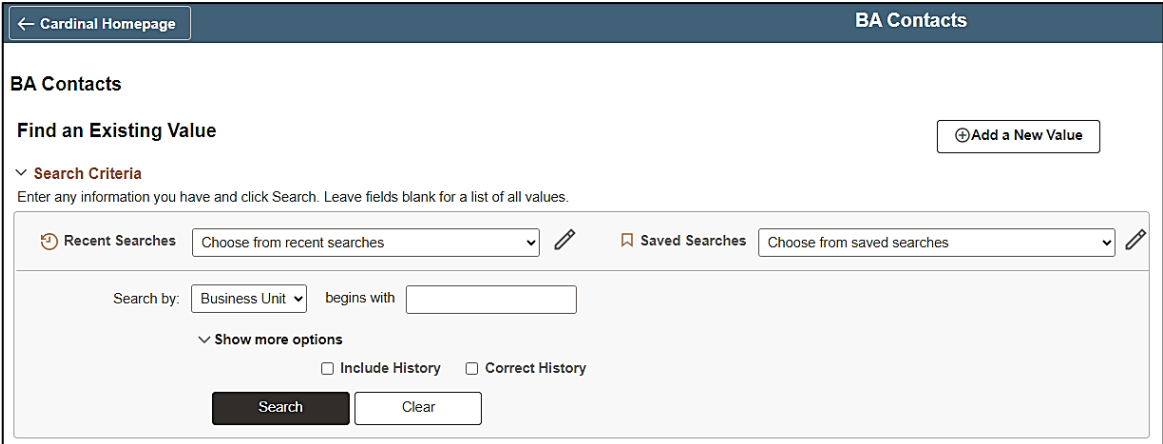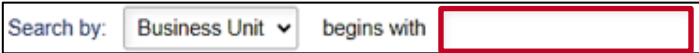
Table of Contents

Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Step 1 and 3; Section 2, after Step 1 and 3; Section 3, after Step 1 and 3). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

![Cardinal logo]

Adding a New BA Contact

This section of the Job Aid should be used when adding a new BA Contact for a Business Unit/Group ID. There are six types of contacts that can be defined. Please note that each Contact Type is limited to one person.

Step	Action
1.	Navigate to the **BA Contacts** page using the following path: **NavBar > Menu > Benefits > Employer Information > BA Contacts**

The **BA Contacts Find an Existing Value** page displays

	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the applicable Business Unit in the **Business Unit** field.
3.	Click the **Search** button.

Step	Action
	The page refreshes and the search results display at the bottom of the page.

> ∨ **Search Results**
> 4 results - Business Unit "10100"

Business Unit	Group ID	
10100	101002000	>
10100	101003000	>
10100	101005000	>
10100	101102000	>

1-4 of 4 | View All

Step	Action
4.	Click the **Drill In** icon **(>)** for the corresponding Group ID.

> ∨ **Search Results**
> 4 results - Business Unit "10100"

Business Unit	Group ID	
10100	101002000	>
10100	101003000	>
10100	101005000	>
10100	101102000	>

1-4 of 4 | View All

ℹ	Each Group ID must be updated individually.

Step	Action
	The **BA Contacts** page displays for the applicable Group ID.
5.	Click the **Add a New Row** (**+**) icon to add a new effective dated row.
	The page refreshes with a new effective dated row.
6.	The **Effective Date** field defaults to the current system date. Update as needed using the **Effective Date Calendar** icon.

Step	Action
7.	Add a Contact Type for the new BA Contact. Click the **Add a New Row** (**+**) icon within the **Contacts** section.
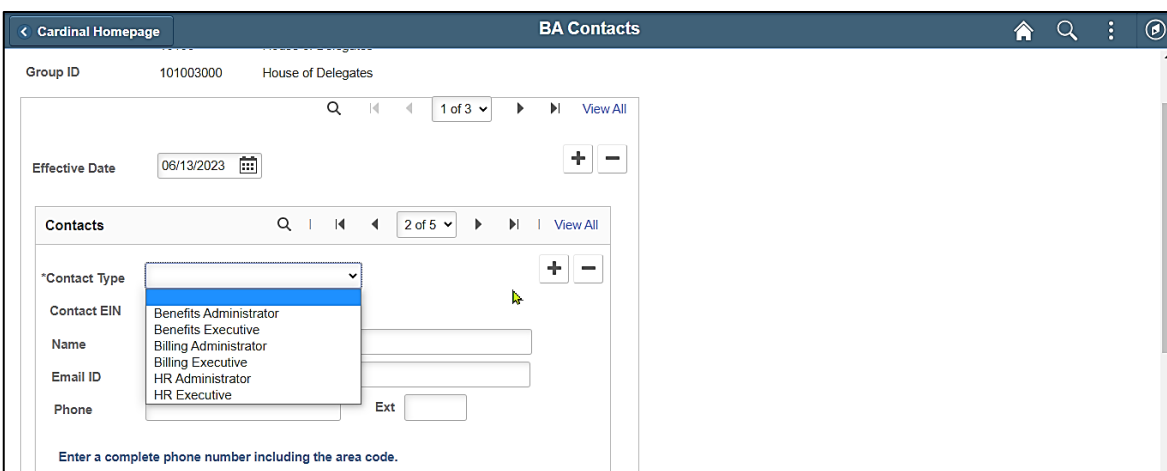
The page refreshes with the new row.
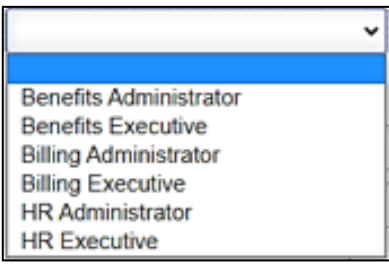
Step	Action
8.	Click the **Contact Type** dropdown button.
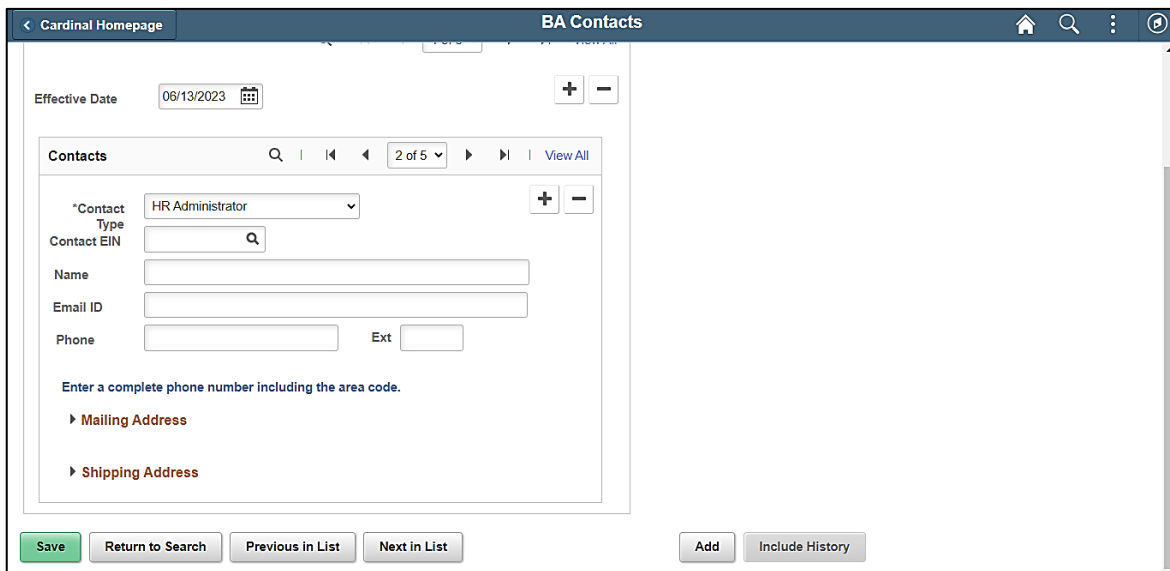
The **Contact Type** menu displays.

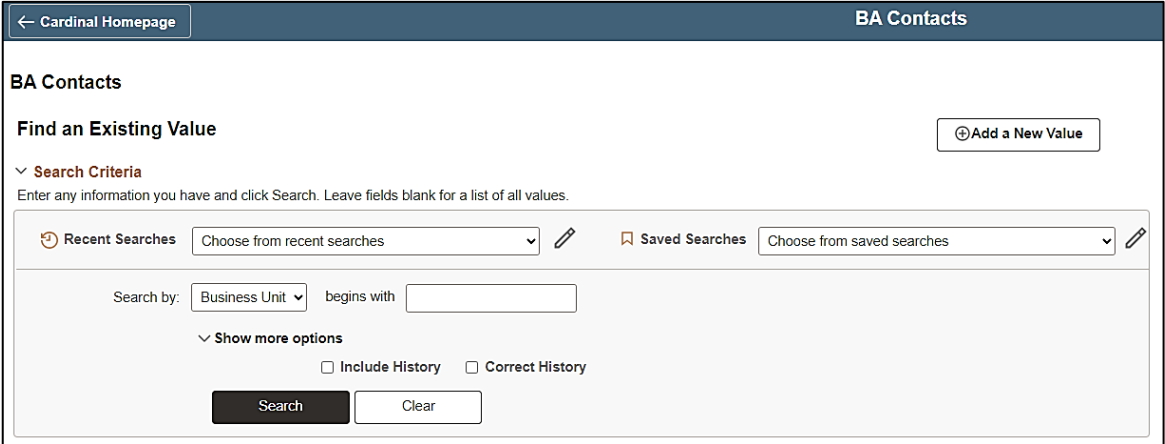| Step	Action
9.	Select the applicable Contact Type by clicking the corresponding list item based on the following: • The Benefits Administrator is the only required Contact Type and is the only contact who receives email notifications of updates made to dependent information through Employee Self-Service (ESS) • The Benefit Administrator, Benefits Executive, Billing Administrator, and Billing Executive Contact Type details are reported to DHRM • The HR Administrator and HR Executive Contact Types are for informational purposes only in Cardinal Benefits Administrator Benefits Executive Billing Administrator Billing Executive HR Administrator HR Executive
	The **BA Contacts** page redisplays.
10.	Enter or select the applicable employee's Employee ID Number in the **Contact EIN** field. Contact EIN [🔍]
ℹ️	Once entered, the **Name**, **Email ID**, and **Phone** fields will automatically populate. Skip to Step 12. If a shared email address is being used, do not populate the **Contact EIN** field. In this case, proceed with Step 11.

Step	Action
11.	Enter the applicable employee's email address or the shared email address into the **Email ID** field. Email ID [ ]
12.	Expand the **Mailing Address** section and **Shipping Address** section and populate the address information as needed. ▶ Mailing Address

Sample with completed data entry.

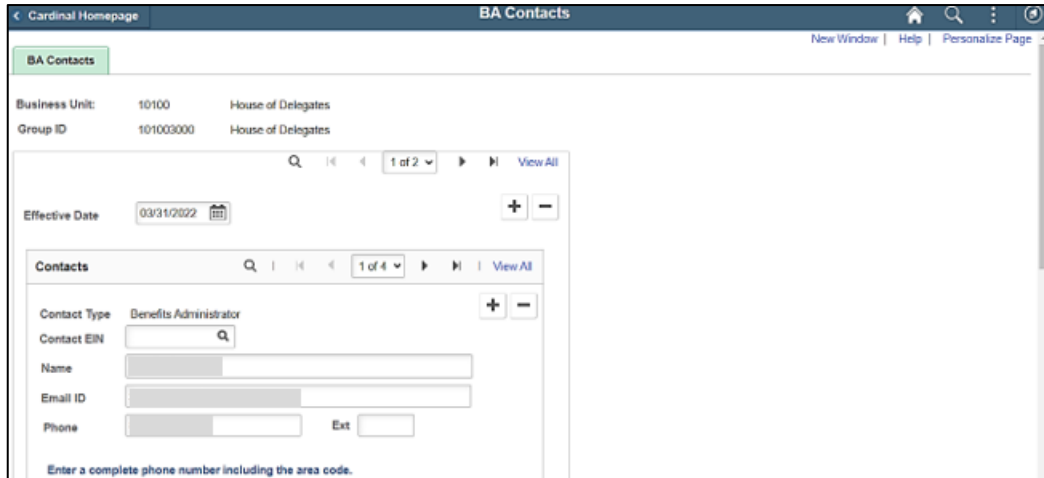| Step	Action
13.	Click the **Save** button at the bottom of the page. Save Return to Search Previous in List Next in List
ℹ	Repeat these steps for each Group ID within the Business Unit to add the new BA Contact as needed.

Editing an Existing BA Contact

This section of the Job Aid should be used when editing the information for an existing BA Contact for a Business Unit/Group ID. This functionality can be used to edit information such as the BA Contact's phone number information and address information. A group email address can also be edited using this functionality.

Step	Action
1.	Navigate to the **BA Contacts** page using the following path: **NavBar > Menu > Benefits > Employer Information > BA Contacts**
	The **BA Contacts Find an Existing Value** page displays.
ℹ️	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the applicable Business Unit in the **Business Unit** field.
3.	Click the **Search** button.

Step	Action
	The page refreshes and the search results display at the bottom of the page. ∨ **Search Results** 4 results - Business Unit "10100" |< < 1-4 of 4 ∨ > >| | View All **Business Unit** **Group ID** 10100 101002000 > 10100 101003000 > 10100 101005000 > 10100 101102000 >
4.	Click the **Drill In** icon (**>**) for the corresponding Group ID. ∨ **Search Results** 4 results - Business Unit "10100" |< < 1-4 of 4 ∨ > >| | View All **Business Unit** **Group ID** 10100 101002000 > 10100 101003000 > 10100 101005000 > 10100 101102000 >
🛈	Each Group ID must be updated individually.

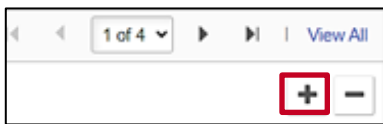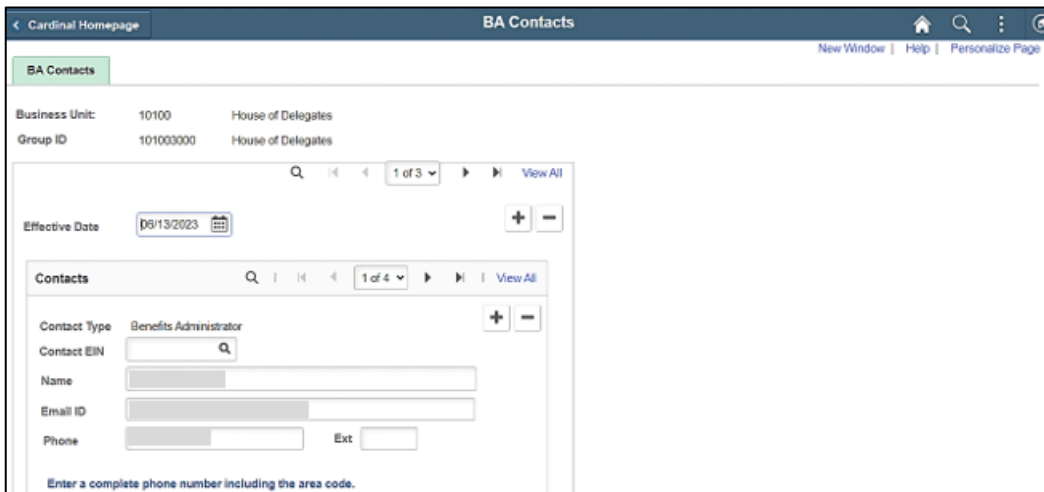| Step	Action
The **BA Contacts** page displays for the applicable Group ID.	

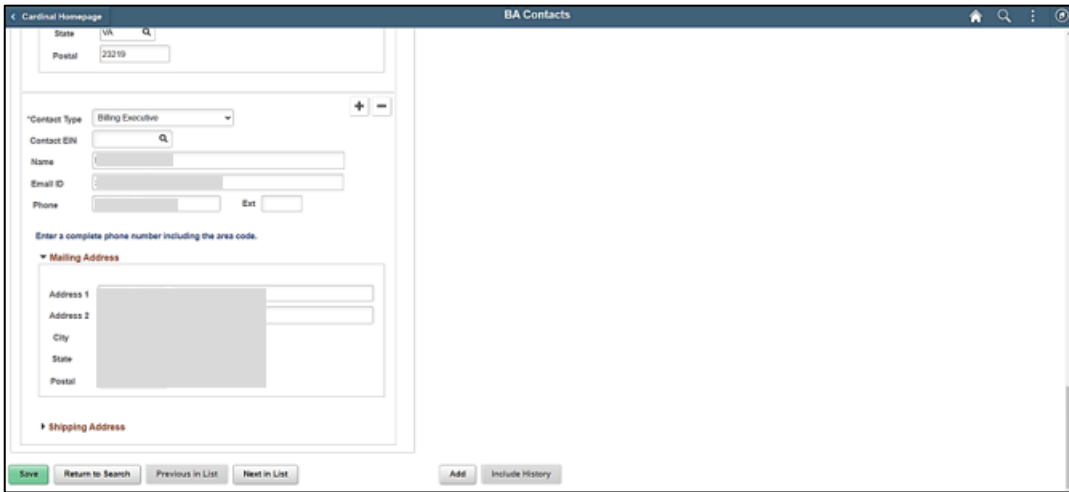|	A new effective dated row must be created before making the required edits to the BA Contact information.

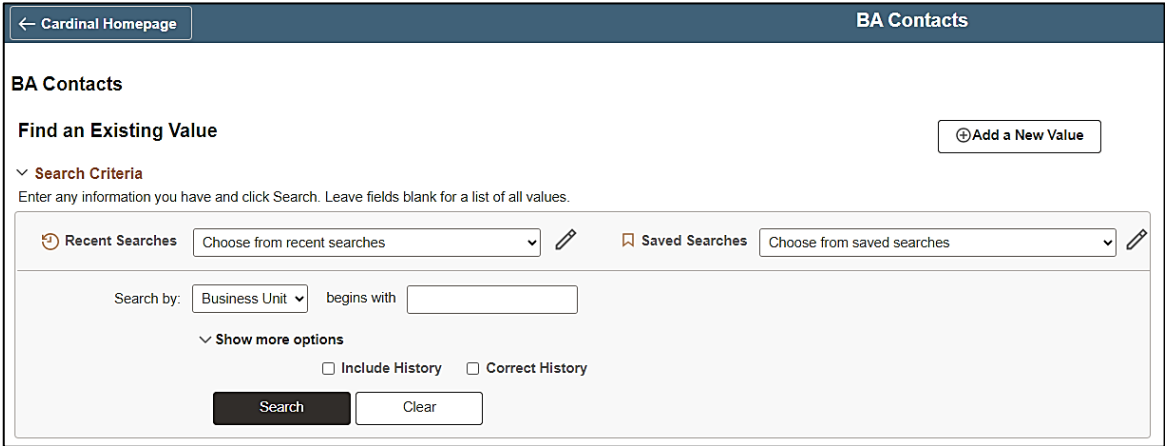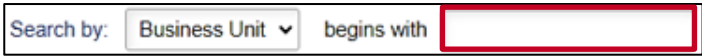| 5.	Click the **Add a New Row** (**+**) icon to add a new effective dated row.

The page refreshes with a new effective dated row.

Step	Action
6.	The **Effective Date** field defaults to the current system date. Update as needed using the **Effective Date Calendar** icon. Effective Date 06/13/2023 ▦
7.	Click the **View All** link within the **Contacts** sections. Contacts Q ◄ ◄ 1 of 4 ⌄ ► ►| View All

The page refreshes and all rows within the **Contacts** section are displayed. Scroll down to the Contact Type that requires editing.

🛈	Edits can be made to the phone information or the address information. Group email address information can also be edited. If edits are required to the name or Contact EIN, the existing BA contact should be deleted and the new BA Contact should be added.
8.	Click the **Save** button. Save Return to Search Previous in List Next in List
🛈	Repeat these steps for each Group ID within the Business Unit to edit this BA Contact as needed.

Deleting an Existing BA Contact

This section of the Job Aid should be used when deleting an existing BA Contact for a Business Unit/Group ID.

Step	Action
1.	Navigate to the **BA Contacts** page using the following path: **NavBar > Menu > Benefits > Employer Information > BA Contacts**
	The **BA Contacts Find an Existing Value** page displays.
ℹ	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the applicable Business Unit in the **Business Unit** field.
3.	Click the **Search** button.

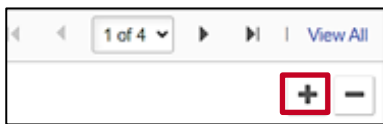| Step	Action
	The page refreshes and the search results display at the bottom of the page.
4.	Click the **Drill In** icon **(>)** for the corresponding Group ID.
ℹ	Each Group ID must be updated individually.

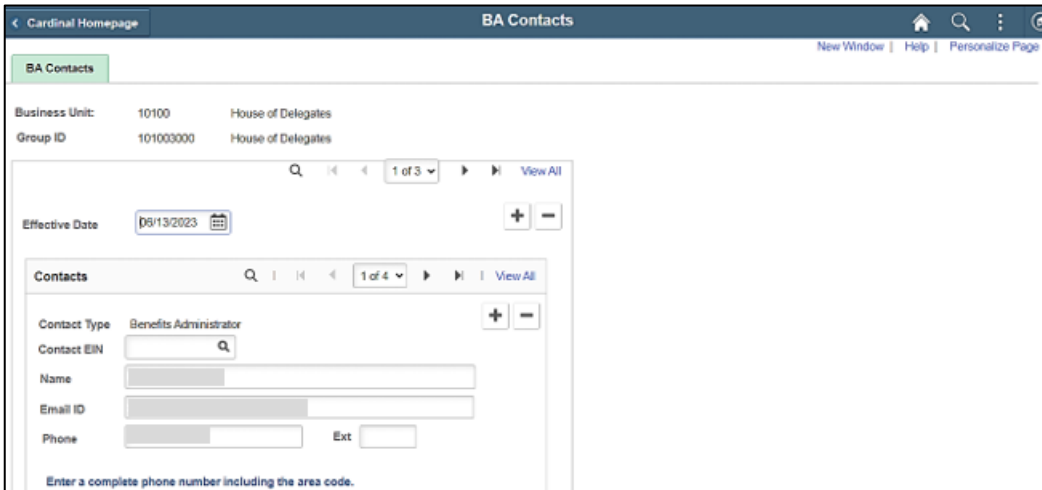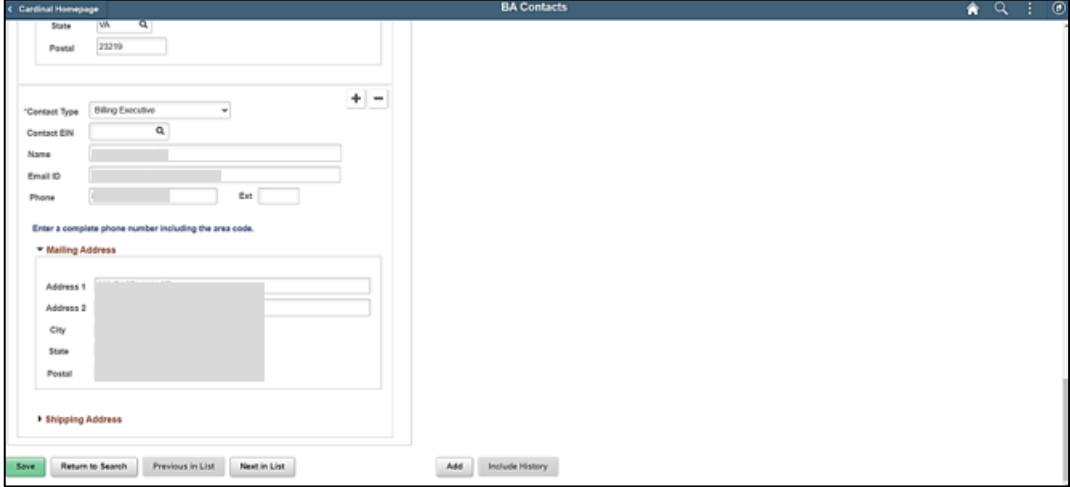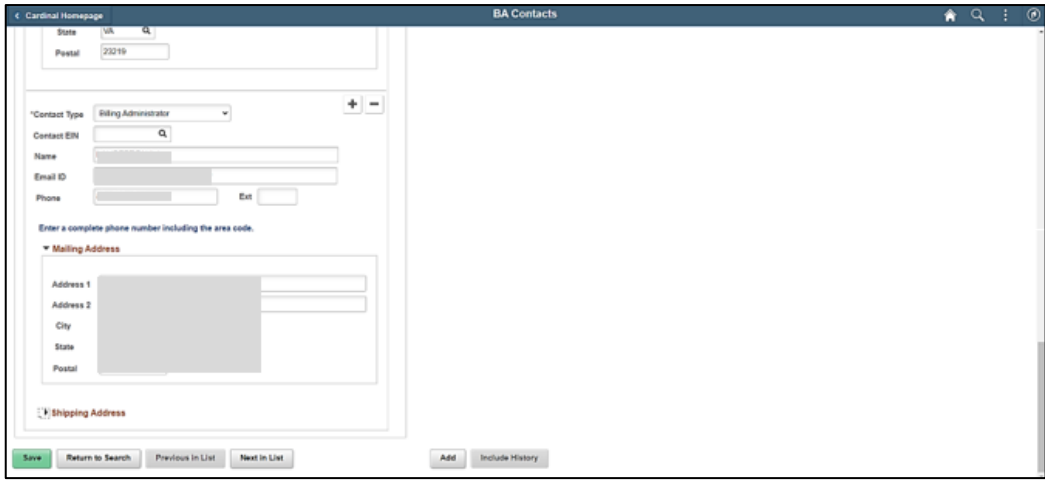| Step	Action
	The **BA Contacts** page displays for the applicable Group ID.
ⓘ	A new effective dated row must be created before making the required edits to the BA Contact information.
5.	Click the **Add a New Row** (**+**) icon to add a new effective dated row.
	The page refreshes with a new effective dated row.

Step	Action
6.	The **Effective Date** field defaults to the current system date. Update as needed using the **Effective Date Calendar** icon. Effective Date 06/13/2023 📅
7.	Click the **View All** link within the **Contacts** sections. Contacts 🔍 ◀◀ ◀ 1 of 4 ▾ ▶ ▶▶ View All

The page refreshes and all rows within the **Contacts** section are displayed. Scroll down to the BA Contact that needs to be deleted. 	

Step	Action
8.	Click the **Delete Row** icon (**-**) for the applicable BA Contact. *Contact Type Billing Executive ➕ ➖

A **Confirmation** message displays in a pop-up window. Delete current/selected rows from this page? The delete will occur when the transaction is saved. [OK] [Cancel]	

Step	Action
9	Click the **OK** button to confirm the deletion. [**OK**]

Step	Action
	The **BA Contacts** page redisplays.
ℹ	The deleted BA Contact no longer displays.
10.	Click the **Save** button.
ℹ	Repeat these steps for each Group ID within the Business Unit to delete this BA Contact as needed.