Human Capital Management (HCM)

Benefit Event Page Forum

July 13, 2023

Agenda

- Event Class Changes
- New Benefit Event Detail Page
- New Error Message: Healthcare FSA/FSA Fee
- Featured Report: FSA and Admin Fee Errors Query
- Upcoming Changes and Enhancements
- Q & A
- Next Steps
- Additional Support
- Meeting Wrap-Up

Event Class Changes

What are Event Classes?

Event Class is a code used in Cardinal to indicated the type of benefit event. This code is automatically populated in the new Benefit Event ~~Entry~~ Detail page. Several additions and changes have been made to these values.

A summary of all event classes can be found on the Cardinal website: Cardinal Website > Learning > Job Aids > BN361_Benefit Event Class Codes (excel)

Event Class Sample

Event Class	Description	Event Created By	Available in Self Service	Confirmation Generated
A26	Covered Child Lost Eligibility	System Process	No	Yes
ADR	Address Change	Personal Data Entry	Yes	No
BIR	Birth or Adoption	Manual/Ben Event Page	Yes	Yes
DCH	Death of Child	Manual/Ben Event Page	No	Yes
DGE	Dpndnt Gained Eligibility w ER	Manual/Ben Event Page	Yes	Yes
DIV	Divorce	Manual/Ben Event Page	Yes	Yes

Event Class Changes

New Event Classes

Event Class	Description
AEX	Add Dependent to Existing Family Coverage
CLE	Covered Child Lost Eligibility
FSA	FSA Change Only
LOC	Move Affecting Eligibility for Healthcare Plan
OOE	Other Employer's Open Enrollment or Plan Change
MKT	Enroll in Qualified Marketplace Exchange Plan
PTF	Employment Change – Part time to Full time
FTP	Employment Change – Full time to Part time

Changes to Existing Event Classes

Event Class	Description
LOA	Begin Leave Without Pay
RFL	Return from Leave Without Pay
STC	Full time to Part (Term Hlth)
FSC	Benefit Change (BA Only)

Benefit Event ~~Entry~~ Detail Page

Benefit Event ~~Entry~~ Detail Page Overview

The Benefit Event ~~Entry~~ Detail page simplifies the creation of benefit events and will be replacing the Life Event Tool (excel spreadsheet). The Life Event Tool will be removed from the Cardinal website, please delete it from your computer.

The new page performs the following functions:
- Captures Life Event Details
    - Life Event Date
    - Paperwork Receipt Date
    - Prior and Future Coverage Levels
    - Type of Benefit Change
- Calculates Correct Benefit Event Dates
- Automatically Selects the Correct Benefit Class
- Creates Benefit Event

Benefit Event Page Navigation and Search

Navigation: Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

Benefit Event ~~Entry~~ Detail Page
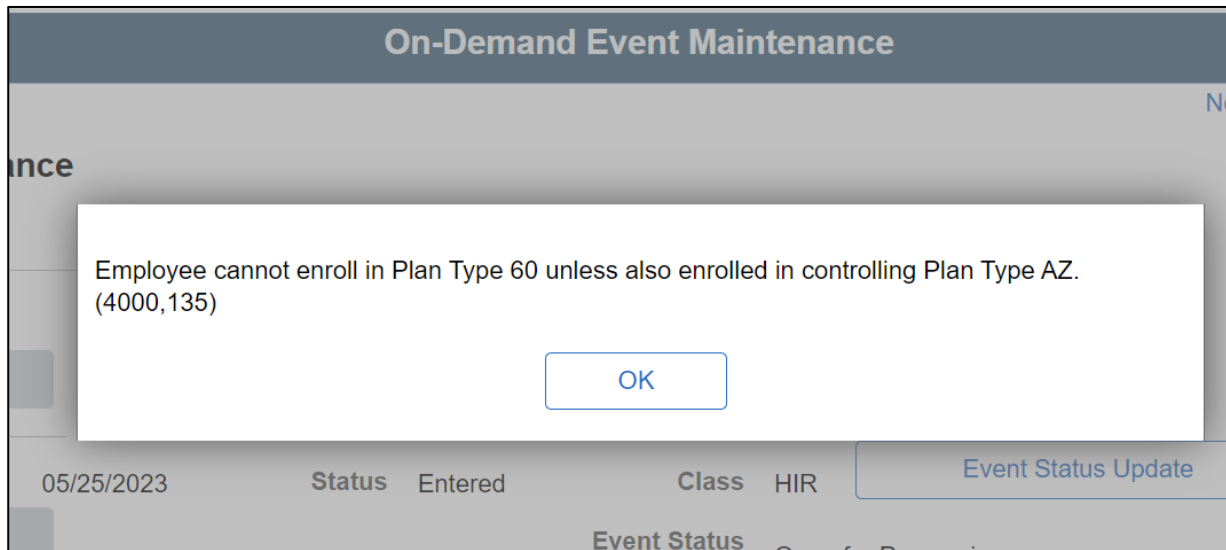
Benefit Event Detail Demo

Questions

Medical FSA/FSA Fee Enrollment Rule

New Error Message

If you or an employee enrolls in FSA (Medical) **without** enrolling in the FSA Fee a new error message will display.

If you receive this message on the On Demand page, return to the Election Entry page and select the FSA Fee.

Featured Report

FSA Admin Fee Enrollment Audit Query

Query Title: The FSA Admin Fee Enrollment Audit
Query Name: V_BN_FSA_ADMINFEE_ENROLL_AUDIT

Query Use: Identifies incorrect FSA Admin Fee Enrollments.
   » Missing the FSA Admin Fee
   » Enrolled in the FSA Admin Fee in error

Suggested Frequency: Twice a Month

Resolution Steps: Once you have identified the employees who are incorrectly enrolled, you will need to reopen the benefit event that enrolled them in FSA and take corrective action.

Job Aid

BN361 Benefits Quick Reference Guide – Use when Reopening an Event to add the FSA Admin Fee (pg 11)

Need help running a query?
Use the NAV225 Running an HCM Query for support.

FSA Admin Fee Enrollment Audit Query – Accessing Results

Query Example

	A	B	C	D	E	F	G
1	**FSA and Admin Fee Errors**	5					
2	**Employee ID**	**Employee Record**	**Employee Name**	**Company**	**Pay Group**	**HR Status**	**Dept Descr**
3		0		BCC	SM1	A	BLAND CORRECTIONAL CENTER
4		1		BCC	SL1	A	BLAND CORRECTIONAL CENTER
5		0		BCC	SM1	A	BLAND CORRECTIONAL CENTER
6		0		BCC	SM1	A	BLAND CORRECTIONAL CENTER
7							

	H	I	J	K	L	M
1						
2	**HCARE Effdt**	**HCARE Election**	**HCARE Benefit Plan**	**DCARE Effdt**	**DCARE Election**	**DCARE Benefit Plan**
3	6/25/2023	E	FLXMED			
4	6/25/2023	W				
5	6/25/2023	E	FLXMED			
6	6/25/2023	E	FLXMED			
7						

	N	O	P	Q	R
1					
2	**Admin Fee Effdt**	**Admin Fee Election**	**Admin Fee Benefit Plan**	**Email Type**	**Email**
3	6/25/2023	W		BUSN	
4	6/25/2023	E	FSAFEE	BUSN	
5	6/25/2023	W		BUSN	
6	6/25/2023	W		BUSN	
7					

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Query Demo

Upcoming Changes and Enhancements

Updates Coming for the Benefit Summary Page

The Benefits Summary page will be transformed this summer!

Daily Enrollment File from VRS

Breaking News! The Cardinal Benefits Team is in the final stages of testing a **daily** VRS enrollment feed.

- Starting **July 28**, Cardinal will start receiving daily files from VRS.
- Look for a communication with more information coming soon.

Q & A

Next Steps

Benefit Event ~~Entry~~ Detail Page Rollout

- **Monday, July 17**, a communication will be sent to Benefits Administrators with instructions, resources, and forum recording.
- The Life Event Tool (excel spreadsheet) will be removed from the Cardinal website, please be sure to remove this document from your computer! (naming convention example: BN361_Life Event Tool.xlsx)
- OHB will begin auditing data entry starting **August 1**.
- Access to the BAS activity table will be available until **August 31**.

Additional Support

Benefit Event Detail Page Job Aids

- [BN361_Creating and Completing a Life Event on behalf of an Employee](#) – new job aid provides step-by-step instructions on creating and completing a manual Benefit Event on behalf of the employee. This job aid replaces a portion of the BN361_Completing a Manual Event job aid

- [BN361_QMCSO Administration](#) – this job aid provides step-by-step instructions for BAs on processing a Qualified Medical Child Support Order (QMCSO)

- [BN361_Benefit Event Class Codes](#) – this excel document provides an explanation of each Cardinal Benefit Event Class code

Cardinal Reporting and Query Support

Job Aids (Continued)

- NAV225 Generating an HCM Report – walkthrough of the processes used to generate an HCM report.

- NAV225 Running an HCM Query – walkthrough of the processes used to run HCM Queries.

- BN361_Managing BA Contacts – overview of the Benefits Administration Contacts page and provides guidance on how to update contact information.

Reports Catalog

- Cardinal HCM Benefits Reports Catalog – covers the Benefits (BN) functional area.

Additional Support

Cardinal Help Desk:

Submit a cardinal help desk ticket by emailing vccc@vita.virginia.gov and include "**Cardinal** …" in the subject line with a brief summary for routing.

- In the email, provide detailed information about your issue (i.e., functional area, page, actions, error).
- Include your name, email address, and a phone number where you can be reached.

Policy, eligibility, and general questions:

- Email: ohb@dhrm.virginia.gov
- Fax: 804-371-0231
- Phone: 888-OHB-4414 (888-642-4414)
  804-225-3642 in Richmond

When you contact the Office of Health Benefits (OHB) about specific issues, be sure to include the employee's name, the ID number, and a brief description of the issue. The Form Agency Request for Assistance Form is available on the DHRM Web site.

Meeting Wrap-Up