



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](#)
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Event Class Changes



What are Event Classes?

Event Class is a code used in Cardinal to indicate 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 | Dpendnt 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

[< Cardinal Homepage](#) Benefit Event Entry

Benefit Event Entry

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

[Find an Existing Value](#)

▼ **Search Criteria**

Search by: begins with

Include History Correct History

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

[Search](#) [Advanced Search](#)



Benefit Event **Entry** Detail Page

Benefit Event Detail

GLEN LEONARD

Employee

ID 00858361500

Benefit Record Number 0

Life Event

Search | Navigation | 1 of 1 | View All

Life Event



Life Event Date

Paperwork Receipt Date

Health Change

Health Change Needed:

Current Cov. Level: Future Cov. Level:

Change:

FSA Change

FSA Change Needed:

Change:

Special Processing Message (Health)

Special Processing Message (FSA)

Save | Return to Search | Previous in List | Next in List



Benefit Event Detail Demo



Questions

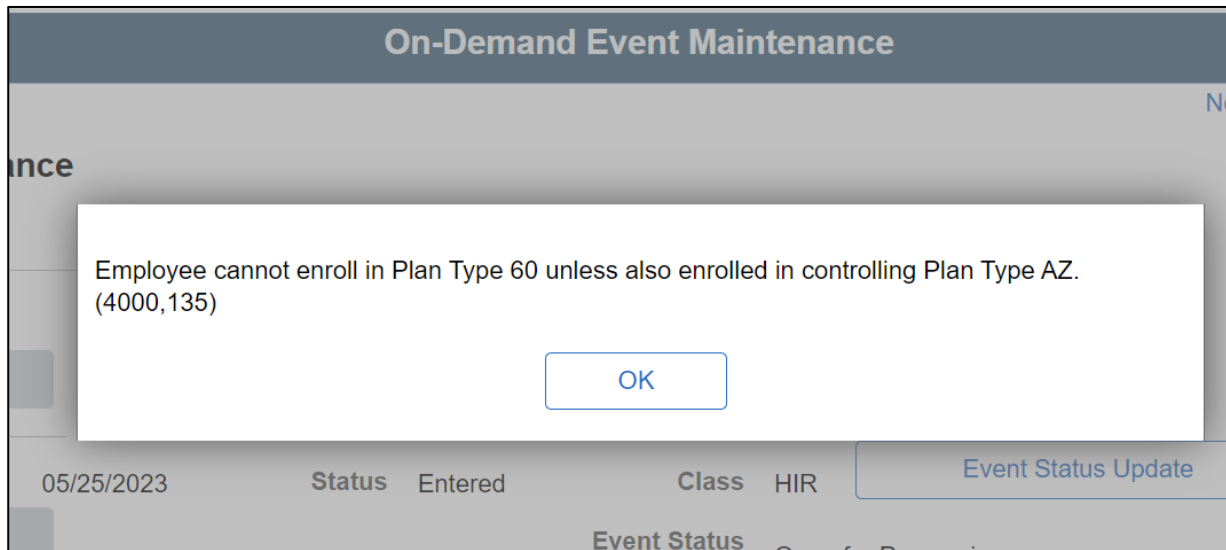


Medical FSA/FSA Fee Enrollment Rule



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 Viewer

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

*Search By begins with

[Advanced Search](#)

*Folder View

Query

| Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule |
|--------------------------------|--------------------------|--------|--------|----------------------|-----------------------|---------------------|--------------------------|
| V_BN_FSA_ADMINFEE_ENROLL_AUDIT | FSA and Admin Fee Errors | Public | | HTML | Excel | XML | Schedule |



V_BN_FSA_ADMINFEE_ENROLL_AUDIT - FSA and Admin Fee Errors

*Effective Date:

| Row | Employee ID | Employee Record | Employee Name | Company | Pay Group | HR Status | Dept Descr | HCARE Effdt | HCARE Election | HCARE Benefit Plan | DCARE Effdt | DCARE Election | DCARE Benefit Plan | Admin Fee Effdt | Admin Fee Election | Admin Fee Benefit Plan | Email Type | Email |
|-----|-------------|-----------------|---------------|---------|-----------|-----------|------------|-------------|----------------|--------------------|-------------|----------------|--------------------|-----------------|--------------------|------------------------|------------|-------|
|-----|-------------|-----------------|---------------|---------|-----------|-----------|------------|-------------|----------------|--------------------|-------------|----------------|--------------------|-----------------|--------------------|------------------------|------------|-------|



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 | | | | | |



Query Demo



Upcoming Changes and Enhancements



Updates Coming for the Benefit Summary Page

The Benefits Summary page will be transformed this summer!

Benefits Summary

Charles Baran
Chief Operating Officer

Person ID KU0002
Benefit Record Number 0

[Return to Select Employee](#)

Benefits Summary Deduction Summary

To view benefits as of another date, enter the date and select Refresh.

Benefits On Refresh

Primary Empl Record 0

Benefits System Benefits Administration
Benefit Program KU1 GBI US Fulltime Benefit Pgm
Benefits Status Active

Benefit Plans

| | | |
|--|---|---|
| Medical Plan Basic Out-of-Network Medical Coverage Employee Only 0 Dependents Coverage Begin 01/01/2000 Review | Dental Plan Standard Dental Plan Coverage Employee Only 0 Dependents Coverage Begin 11/10/2008 Review | Vision Plan Standard Vision Plan Coverage Employee Only 0 Dependents Coverage Begin 11/10/2008 Review |
| Life | Supplemental Life | AD and D |



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