Reviewing Employee Benefits Information Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to review the various elements of Benefits information for an employee. This Job Aid contains sections detailing the processes for reviewing each of the following pages:

- **Health Benefits** page: Used to review the current, historical, and future dated health benefit enrollments for an employee
- **Simple Benefits** page: Used to review the current, historical, and future dated premium reward and flex spending admin fee enrollments for an employee
- **Life and AD/D Benefits** page: Used to review the imputed life enrollment for an employee
- **Spending Accounts** page: Used to review the current, historical, and future dated Flex Spending Medical and/or Flex Spending Dependent Care enrollments for an employee
- **Savings Plan** page: Used to review the current, historical, and future dated Savings Plan enrollments for an employee
- **Retirement Plans** page: Used to review the current, historical, and future dated Retirement Plan enrollments for an employee
- **Current Benefits Summary** page: Used to review all of the current enrollments for an employee

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.

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Revision History

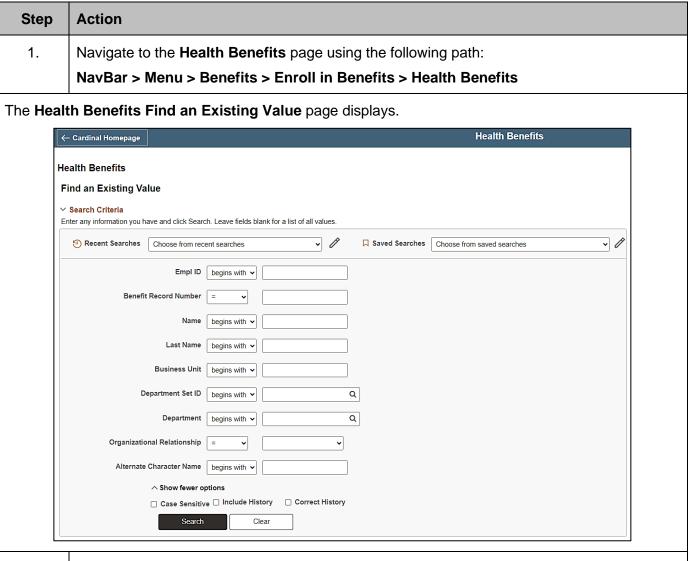| Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Step 1, Section 2, after Step 1; Section 3, after Step 1; Section 4, after Step 1; Section 5, after Step 1; Section 6, after Step 1; Section 7, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Reviewing the Health Benefits Page

The **Health Benefits** page is used to review the health plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The enrolled dependents are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the **Health Benefits** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Health Benefits**

The **Health Benefits 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**.

Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ▾] [_____]
3.	Click the **Include History** checkbox. ☐ Case Sensitive ☐ Include History ☐ Correct History
4.	Click the **Search** button. [Search] [Clear]

The **Health Benefits** page displays.

Step	Action
5.	Review the information as needed.

Reviewing the Simple Benefits Page

The **Simple Benefits** page is used to review the Premium Reward and Flex Spending Admin Fee enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the **Simple Benefits** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Simple Benefits**

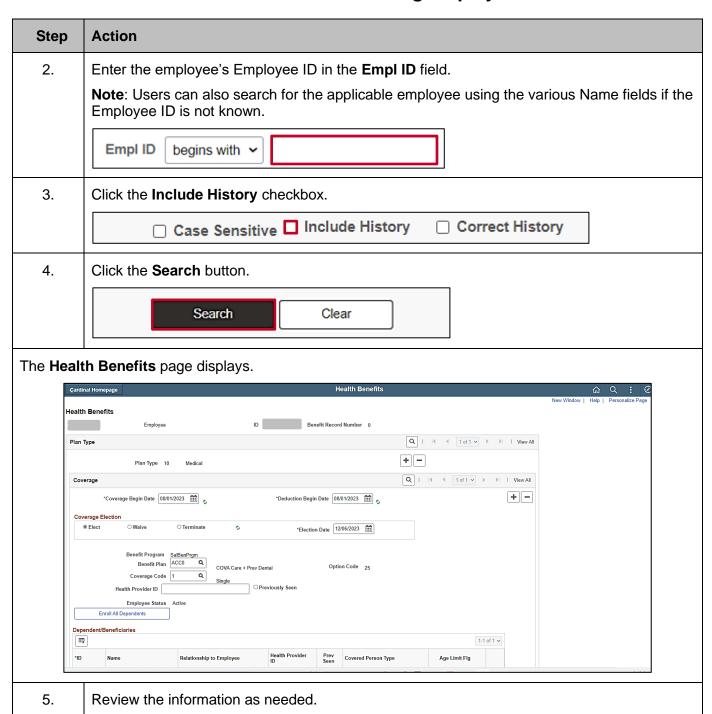The **Simple Benefits Find an Existing Value** page displays.

	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**.

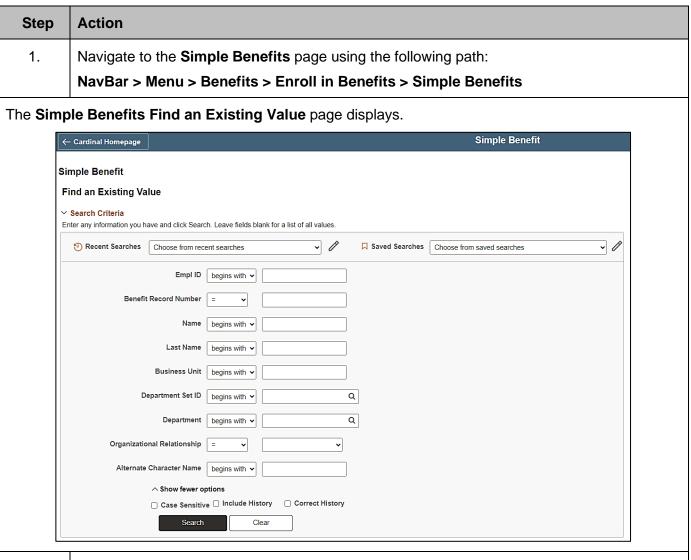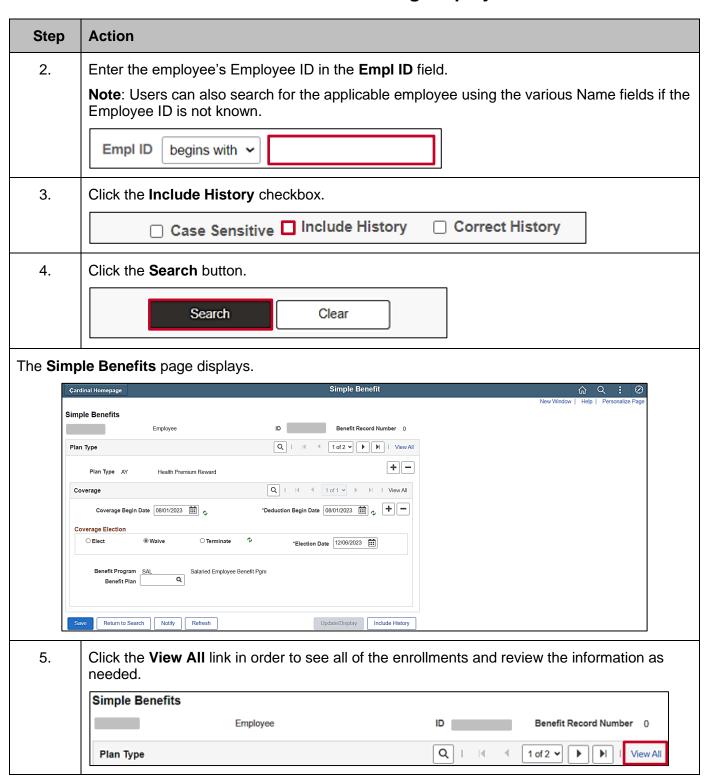| Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ▾] [ ]
3.	Click the **Include History** checkbox. ☐ Case Sensitive ☐ Include History ☐ Correct History
4.	Click the **Search** button. [Search] [Clear]
	The **Simple Benefits** page displays.
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed.

Reviewing the Life and AD/D Benefits Page

The **Life and AD/D** page is used to review the Imputed Life Insurance Income Plan enrollment for an employee. The assigned Beneficiary(ies) are also available for review on this page as applicable.

Step	Action
1.	Navigate to the **Life and AD/D Benefits** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Life and AD/D Benefits**

The **Life and AD/D Benefits Find an Existing Value** page displays.

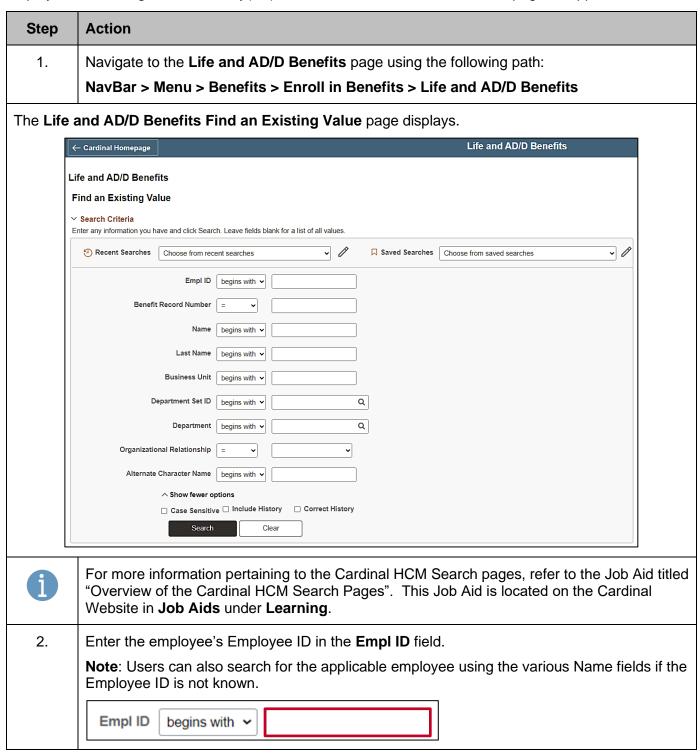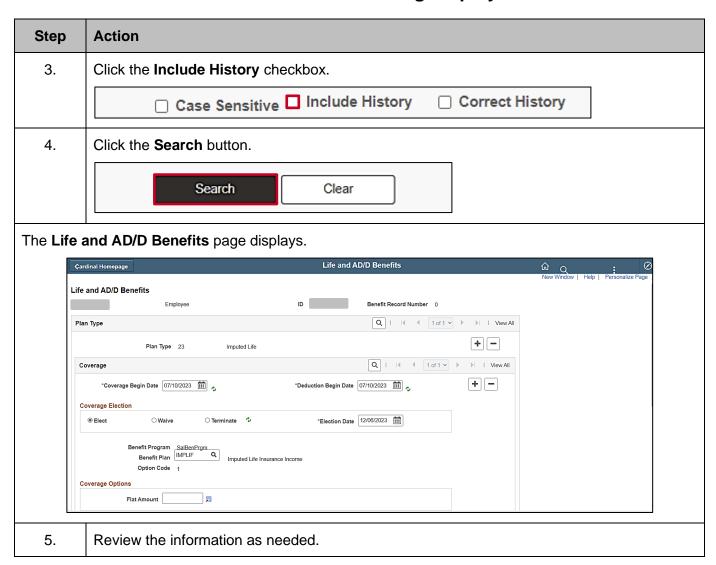|	
ℹ️	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

Step	Action
3.	Click the **Include History** checkbox.
	☐ Case Sensitive ☐ Include History ☐ Correct History
4.	Click the **Search** button.
	Search Clear
	The **Life and AD/D Benefits** page displays.
5.	Review the information as needed.

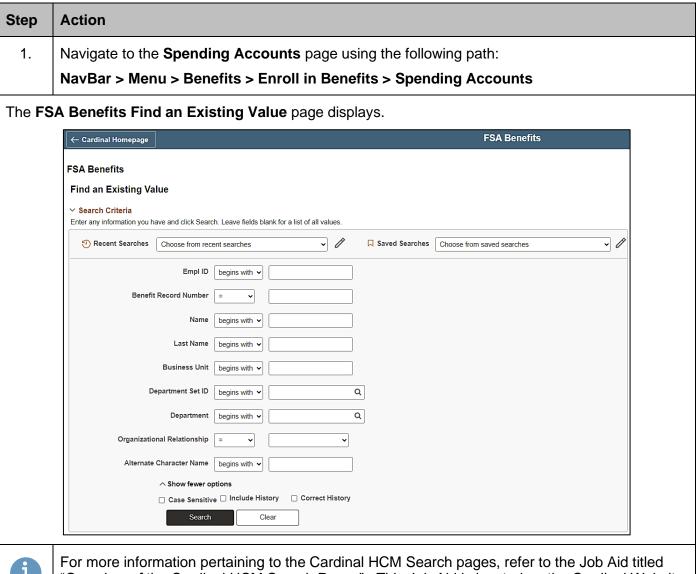## Reviewing the Spending Accounts Page

The **Spending Accounts** page is used to review the Flex Spending Medical and Flex Spending Dependent Care plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. Remember, employees must elect Flex Spending Accounts each Plan Year as desired.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.
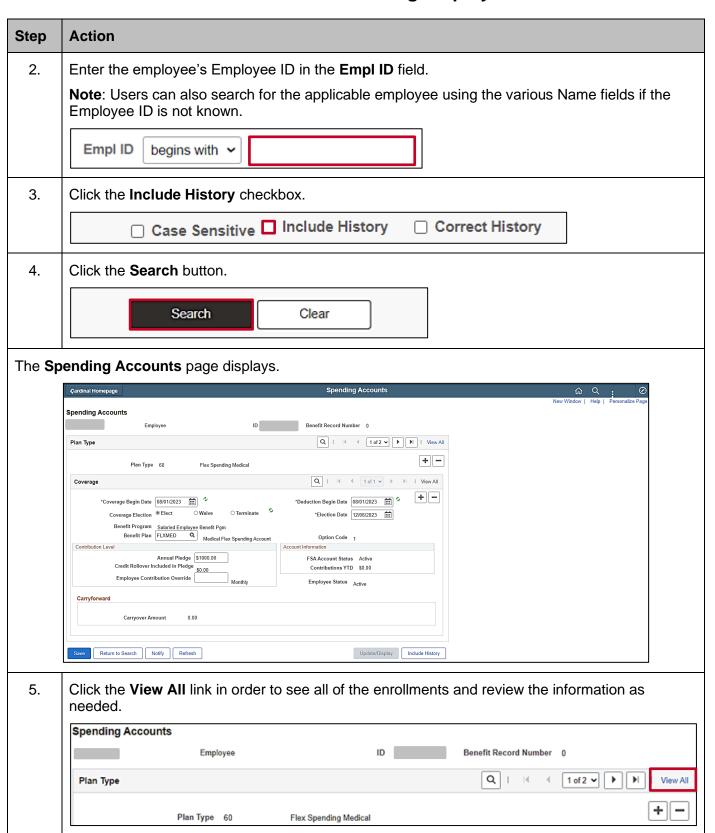
Step	Action
1.	Navigate to the **Spending Accounts** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Spending Accounts**

The **FSA Benefits Find an Existing Value** page displays.

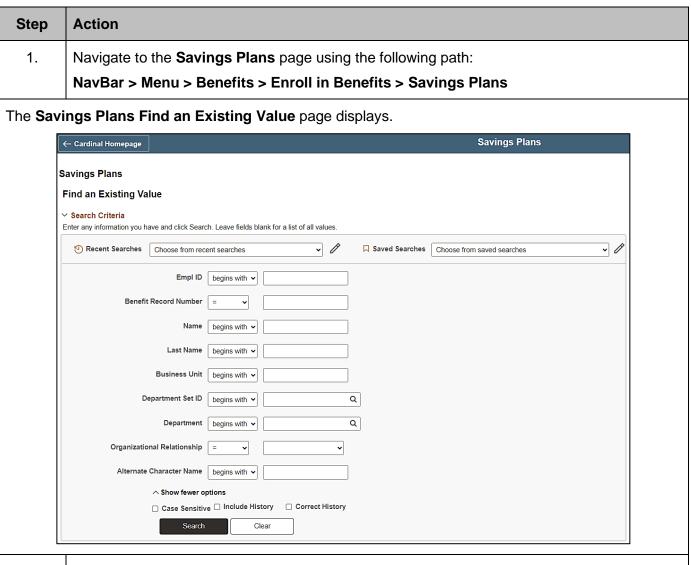|	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ▾] [_____]
3.	Click the **Include History** checkbox. ☐ Case Sensitive ☐ Include History ☐ Correct History
4.	Click the **Search** button. [Search] [Clear]
	The **Spending Accounts** page displays.
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed.

Reviewing the Savings Plans Page

The **Savings Plans** page is used to review the Savings Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The assigned Beneficiary(ies) are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.
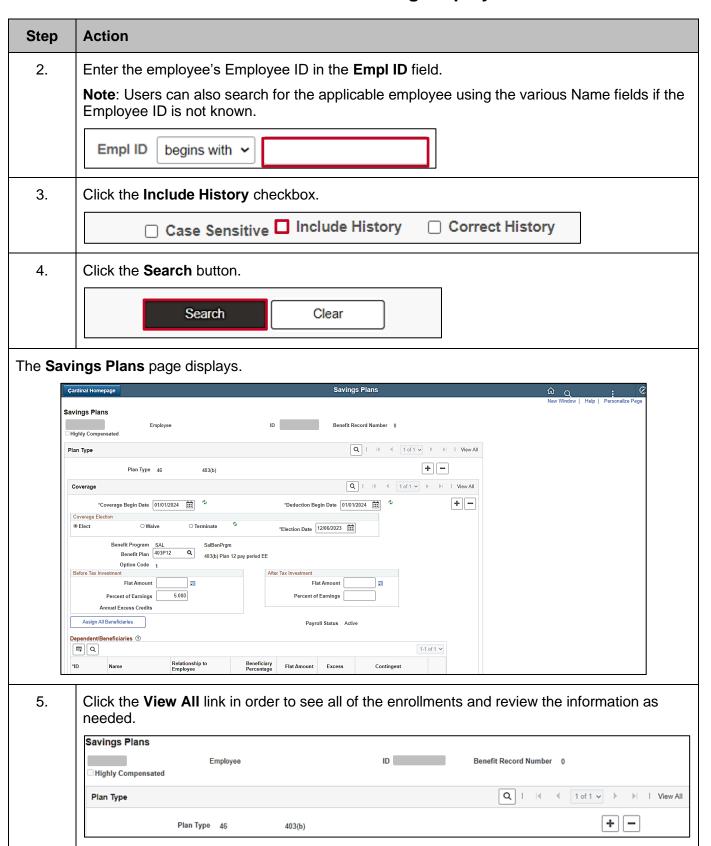
Step	Action
1.	Navigate to the **Savings Plans** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Savings Plans**

The **Savings Plans 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**.

Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ▾] [_____]
3.	Click the **Include History** checkbox. ☐ Case Sensitive **☐** Include History ☐ Correct History
4.	Click the **Search** button. [Search] [Clear]

The **Savings Plans** page displays.

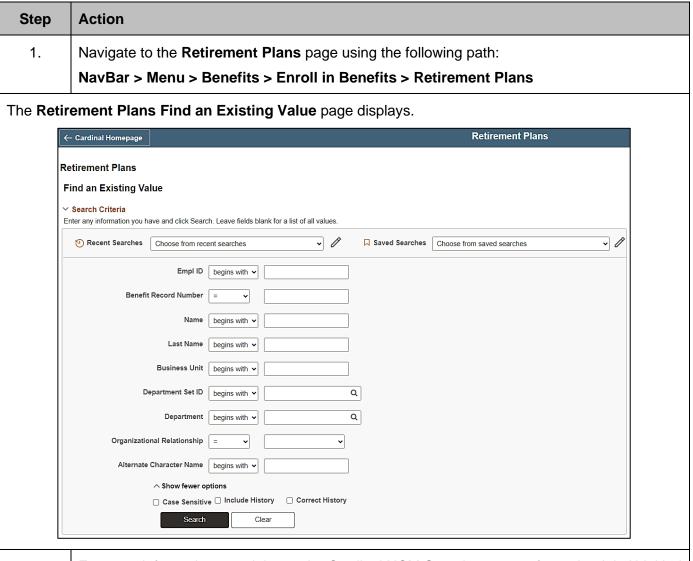| Step	Action
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed.

Reviewing the Retirement Plans Page

The **Retirement Plans** page is used to review the Retirement Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the **Retirement Plans** page using the following path: **NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans**

The **Retirement Plans Find an Existing Value** page displays.
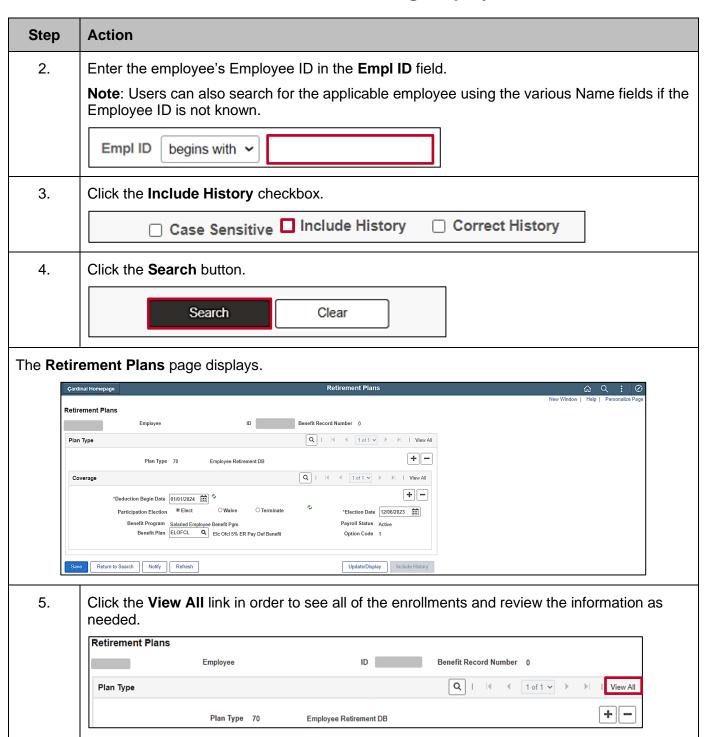

	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

Step	Action
2.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID begins with ⌄ [ ]
3.	Click the **Include History** checkbox. ☐ Case Sensitive ☐ Include History ☐ Correct History
4.	Click the **Search** button. [Search] [Clear]
	The **Retirement Plans** page displays.
5.	Click the **View All** link in order to see all of the enrollments and review the information as needed.

Reviewing the Current Benefits Summary Page

The **Current Benefits Summary** page is used to review all of the current enrollments for an employee. Historical and future dated enrollments will not display on this page. This page can also be used to review the current deductions summary information for the employee.

Step	Action
1.	Navigate to the Current Benefits Summary page using the following path: **NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary**
	The **Current Benefits Summary 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 employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

Step	Action
3.	Click the **Search** button.

The **Current Benefits Summary** page displays with the **Benefits Enrollment Summary** tab displayed by default.

Step	Action
4.	Review the information as needed.
5.	Click the **Benefit Deduction Summary** tab.

The **Benefit Deduction Summary** tab displays.

Step	Action
6.	Review the information as needed.
ℹ	Data will only be reflected on this tab if the agency utilizes Cardinal payroll.