

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.

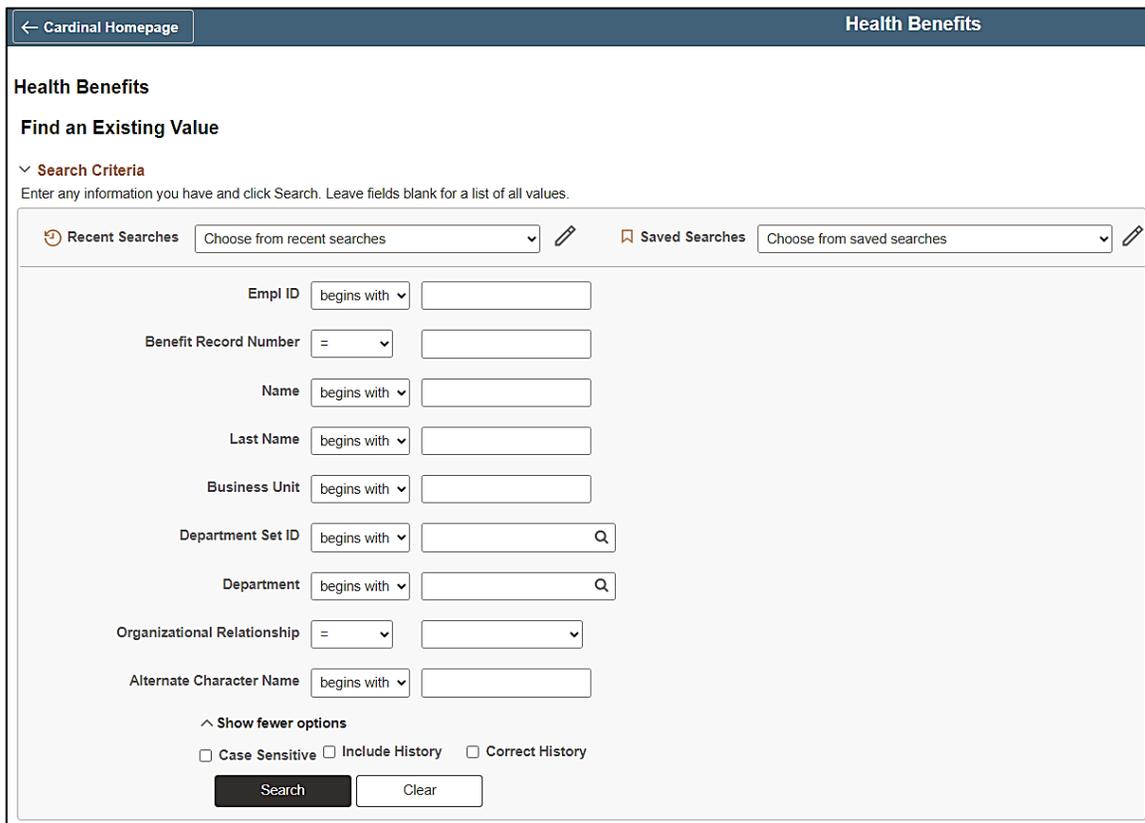
Reviewing the Health Benefits Page

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

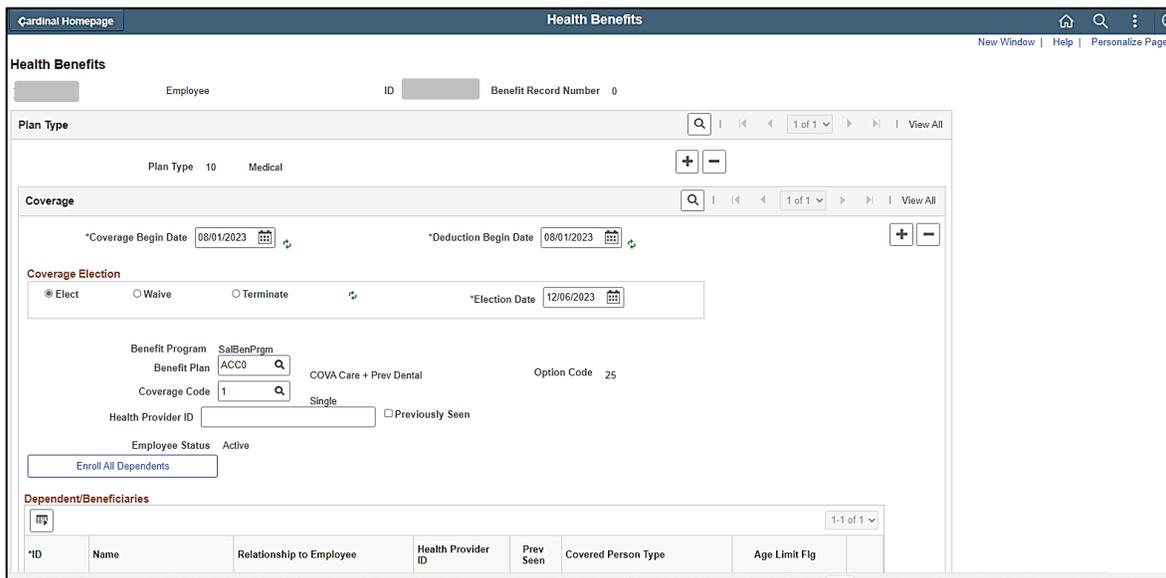
The **Health Benefits Find an Existing Value** page displays.




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.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> 
3.	<p>Click the Include History checkbox.</p> 
4.	<p>Click the Search button.</p> 

The **Health Benefits** page displays.



The screenshot shows the 'Health Benefits' page with the following details:

- Plan Type:** Medical
- Coverage:** *Coverage Begin Date: 08/01/2023; *Deduction Begin Date: 08/01/2023
- Coverage Election:** Elect (selected), Waive, Terminate; *Election Date: 12/06/2023
- Benefit Program:** ACCO COVA Care + Prev Dental
- Option Code:** 25
- Coverage Code:** 1
- Health Provider ID:** Single
- Employee Status:** Active
- Dependent/Beneficiaries Table:**

*ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg

5.	Review the information as needed.
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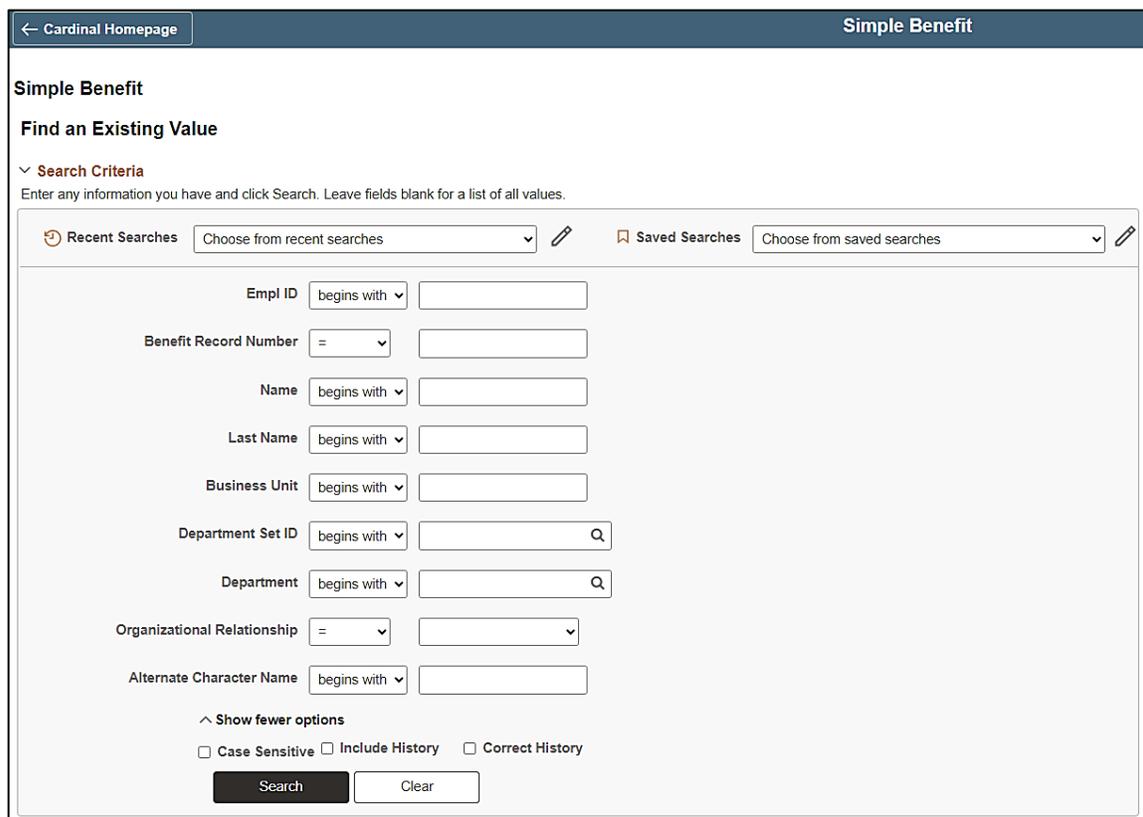
Reviewing the Simple Benefits Page

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

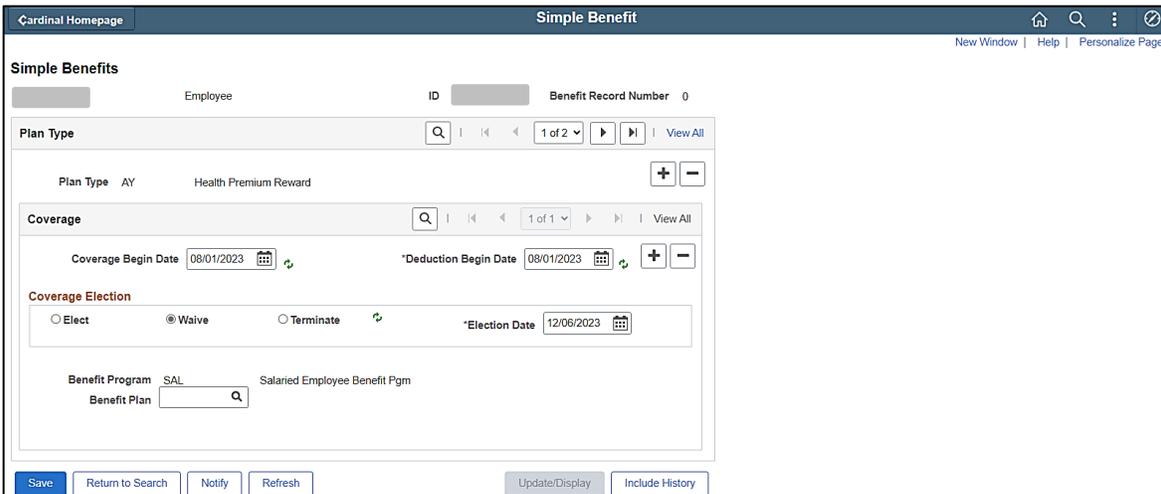
The **Simple Benefits Find an Existing Value** page displays.




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. 
3.	Click the Include History checkbox. 
4.	Click the Search button. 

The **Simple Benefits** page displays.



The screenshot shows the 'Simple Benefit' page with the following details:

- Employee ID: [Redacted]
- Benefit Record Number: 0
- Plan Type: Health Premium Reward (1 of 2 items)
- Coverage: Coverage Begin Date 08/01/2023, Deduction Begin Date 08/01/2023
- Coverage Election: Waive (selected), Election Date 12/06/2023
- Benefit Program: SAL (Salaried Employee Benefit Pgm)
- Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History

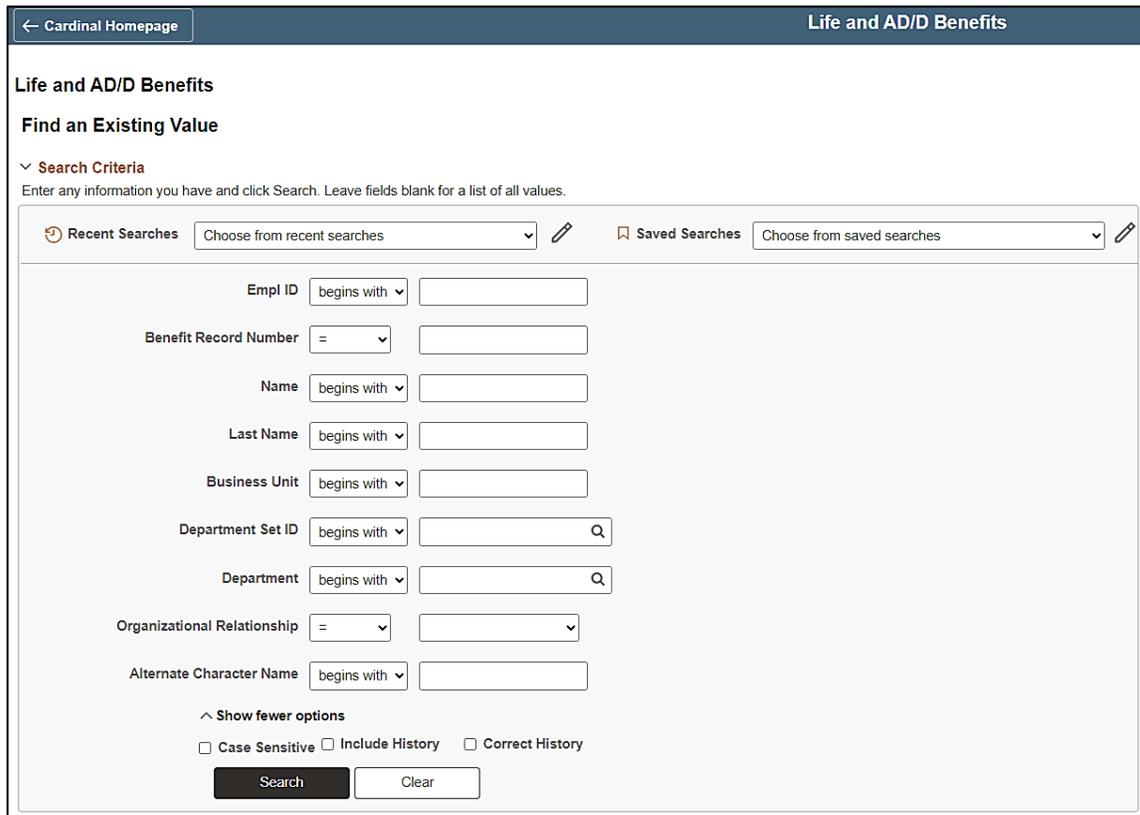
5.	Click the View All link in order to see all of the enrollments and review the information as needed. 
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Reviewing the Life and AD/D Benefits Page

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.



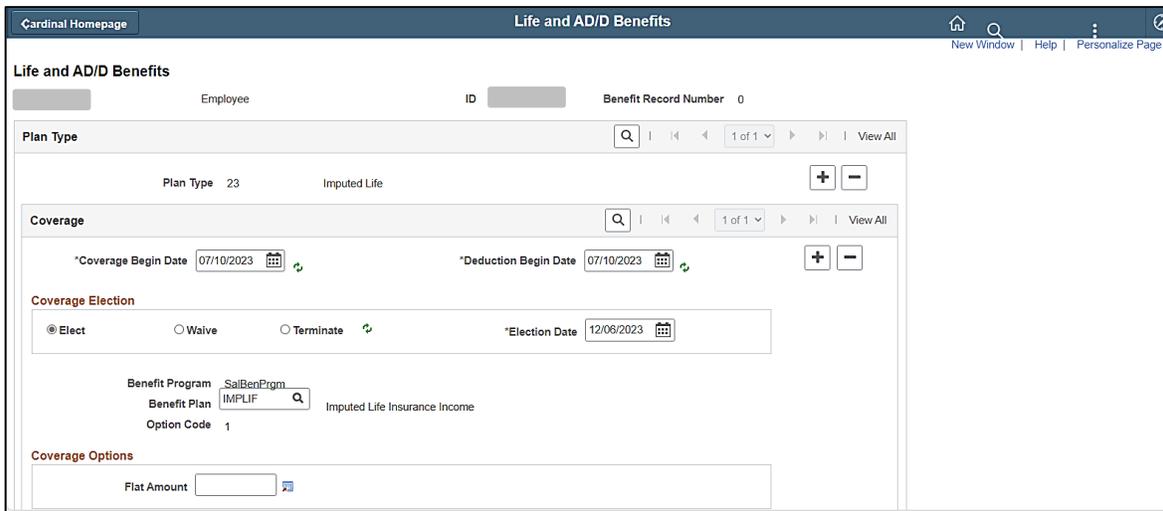
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
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2.	Enter the employee's Employee 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.
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Empl ID begins with ▼

Step	Action
3.	Click the Include History checkbox. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History </div>
4.	Click the Search button. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: inline-block; border: 2px solid red; padding: 5px 15px; background-color: black; color: white; margin-right: 10px;">Search</div> <input style="border: 1px solid black; padding: 5px 20px;" type="text" value="Clear"/> </div>

The **Life and AD/D Benefits** page displays.



The screenshot shows the 'Life and AD/D Benefits' page with the following details:

- Page Header:** Cardinal Homepage, Life and AD/D Benefits, New Window, Help, Personalize Page.
- Employee Information:** Employee ID, Benefit Record Number 0.
- Plan Type:** Plan Type 23, Imputed Life.
- Coverage:** *Coverage Begin Date 07/10/2023, *Deduction Begin Date 07/10/2023.
- Coverage Election:**
 - Radio buttons: Elect, Waive, Terminate.
 - *Election Date: 12/08/2023.
- Benefit Program:** SalBenPrgm, Benefit Plan IMPLIF, Imputed Life Insurance Income, Option Code 1.
- Coverage Options:** Flat Amount.

5.	Review the information as needed.
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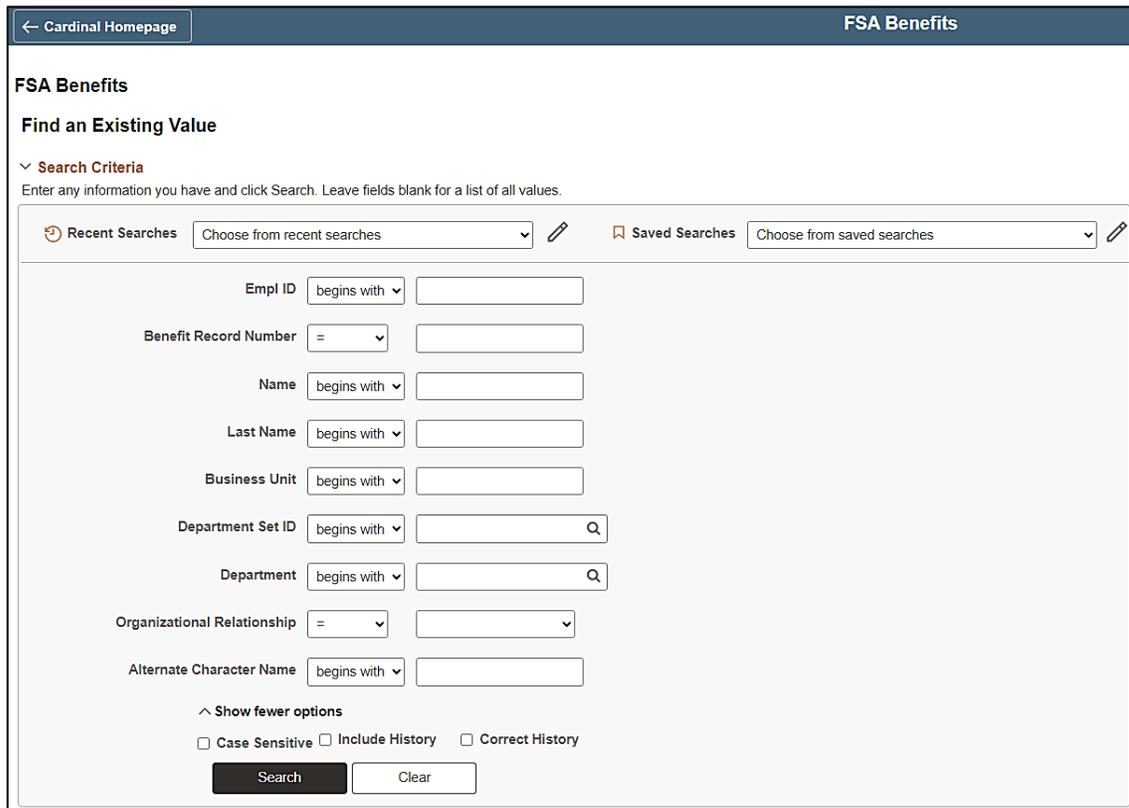
Reviewing the Spending Accounts Page

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

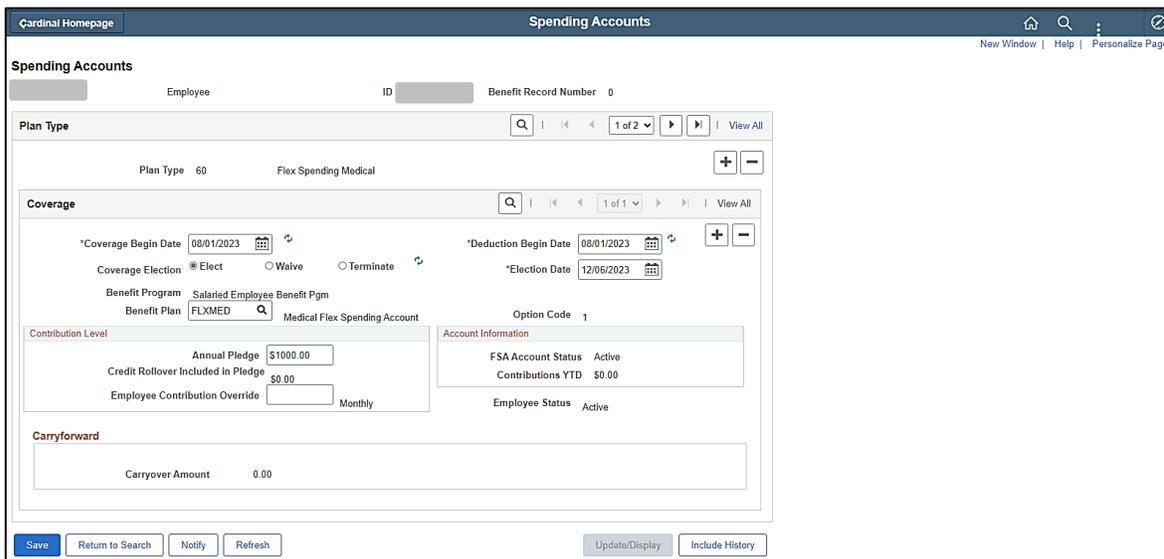
The **FSA Benefits Find an Existing Value** page displays.




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**.

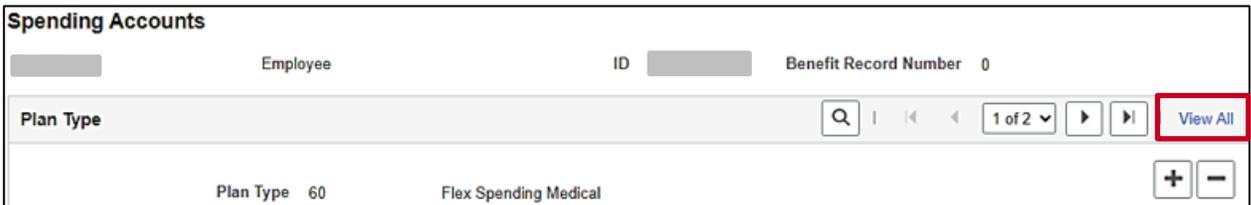
Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> 
3.	<p>Click the Include History checkbox.</p> 
4.	<p>Click the Search button.</p> 

The **Spending Accounts** page displays.



The screenshot shows the 'Spending Accounts' page with the following details:

- Plan Type:** 60, Flex Spending Medical
- Coverage:** Coverage Begin Date 08/01/2023, Deduction Begin Date 08/01/2023, Election Date 12/06/2023
- Contribution Level:** Annual Pledge \$1000.00, Credit Rollover Included in Pledge \$0.00, Employee Contribution Override Monthly
- Account Information:** FSA Account Status Active, Contributions YTD \$0.00, Employee Status Active

5.	<p>Click the View All link in order to see all of the enrollments and review the information as needed.</p> 
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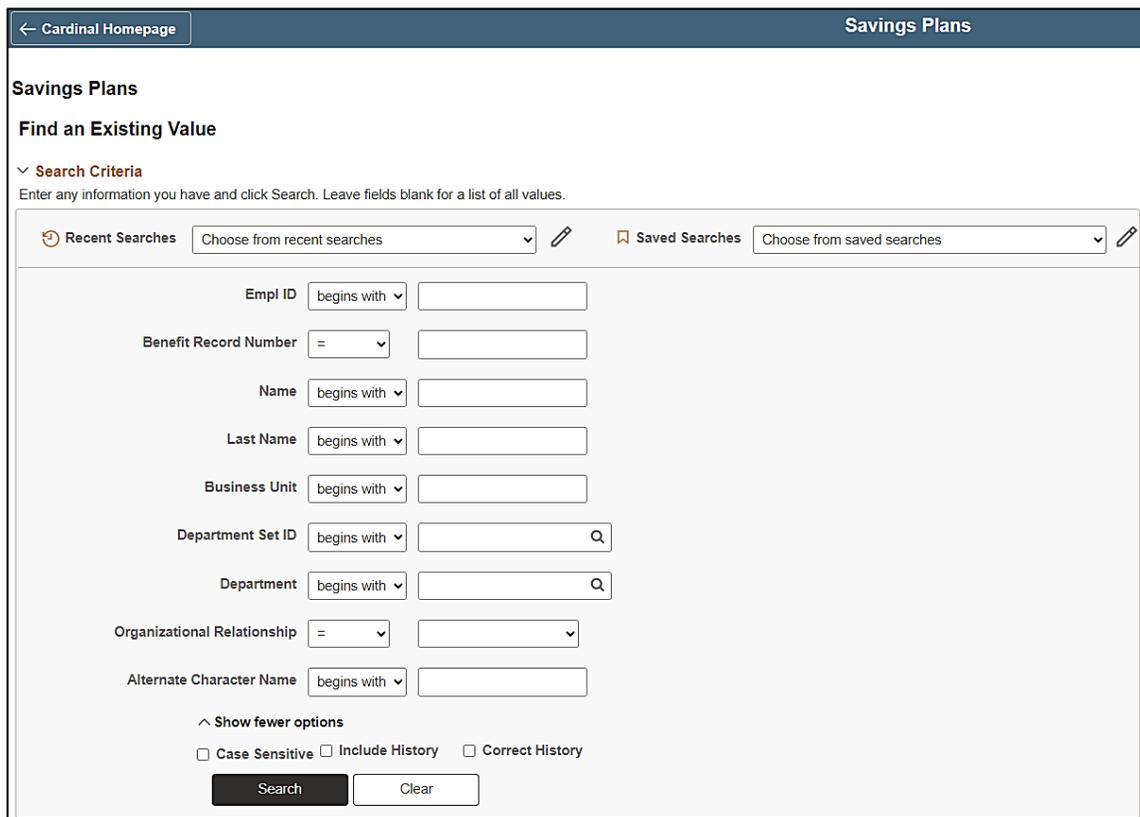
Reviewing the Savings Plans Page

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.



← Cardinal Homepage Savings Plans

Savings Plans

Find an Existing Value

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

🕒 Recent Searches

Empl ID

Benefit Record Number

Name

Last Name

Business Unit

Department Set ID 🔍

Department 🔍

Organizational Relationship

Alternate Character Name

^ Show fewer options

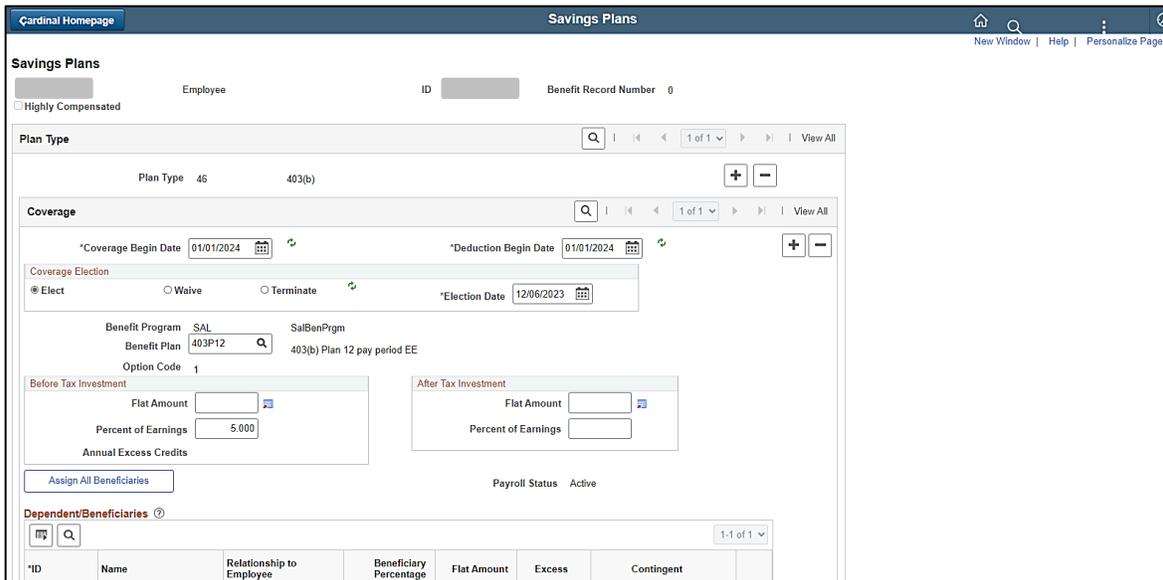
Case Sensitive Include History Correct History



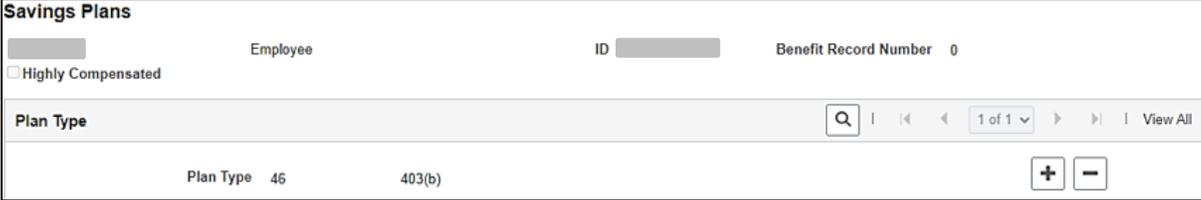
For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

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. 
3.	Click the Include History checkbox. 
4.	Click the Search button. 

The **Savings Plans** page displays.



The screenshot shows the 'Savings Plans' page for an employee. It displays details for a 403(b) plan, including the coverage election (Elect), benefit program (SAL), and investment options (Before Tax and After Tax). The 'View All' link is visible at the top right of the plan details section.

5.	Click the View All link in order to see all of the enrollments and review the information as needed. 
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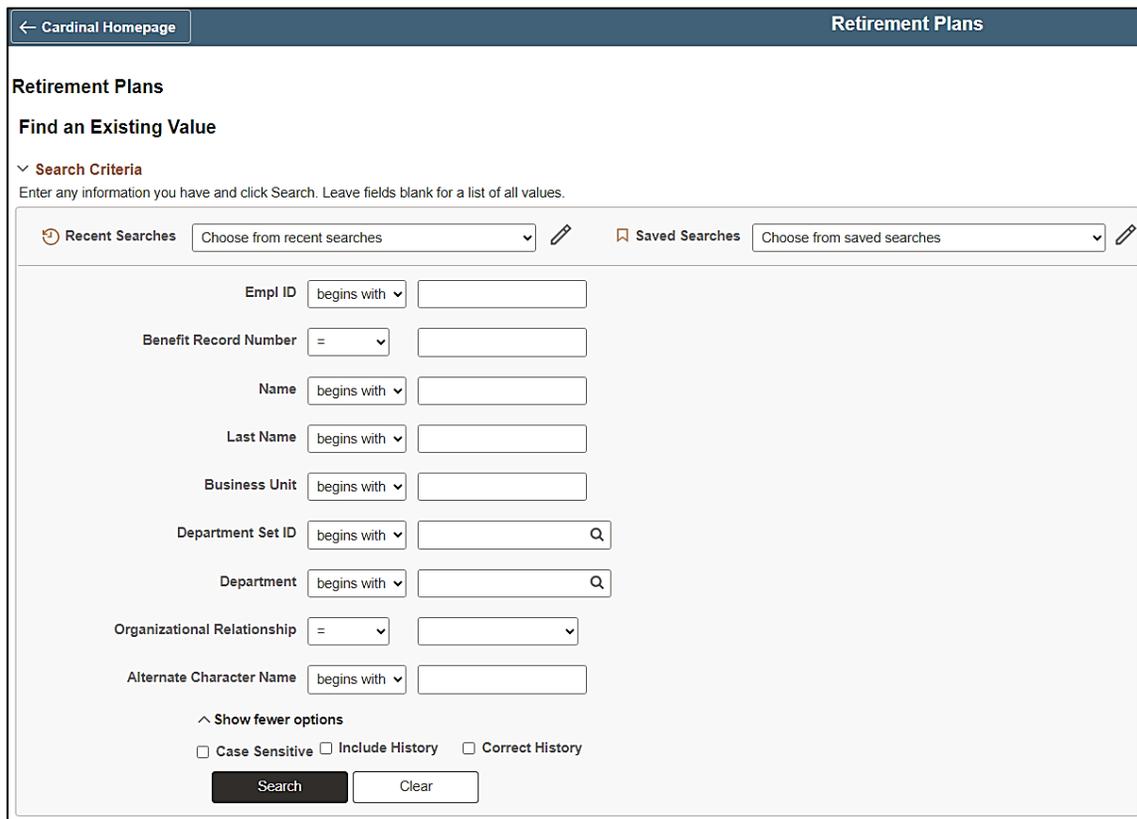
Reviewing the Retirement Plans Page

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

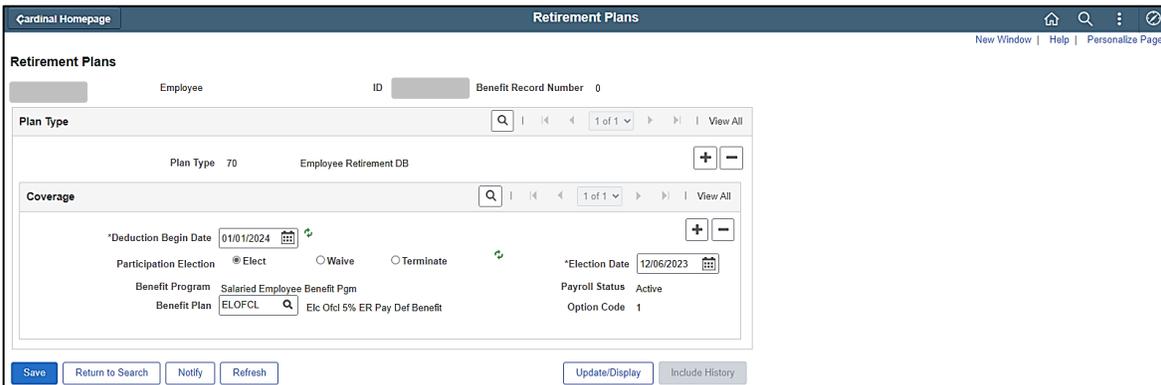
The **Retirement Plans Find an Existing Value** page displays.




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**.

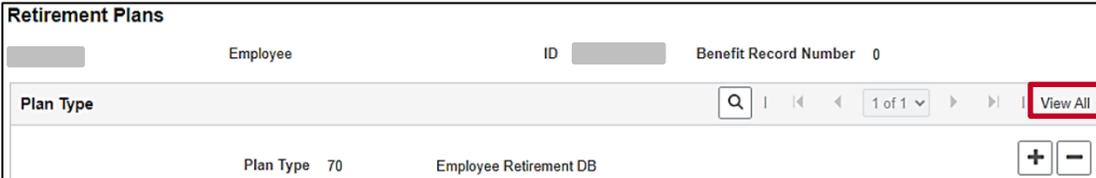
Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> 
3.	<p>Click the Include History checkbox.</p> 
4.	<p>Click the Search button.</p> 

The **Retirement Plans** page displays.



The screenshot shows the 'Retirement Plans' page with the following details:

- Employee ID: [Redacted]
- Benefit Record Number: 0
- Plan Type: 70, Employee Retirement DB
- Coverage: Deduction Begin Date 01/01/2024, Participation Election (Elect selected), Election Date 12/06/2023, Payroll Status Active, Option Code 1.
- Buttons: Save, Return to Search, Notify, Refresh, Update/Display, Include History.

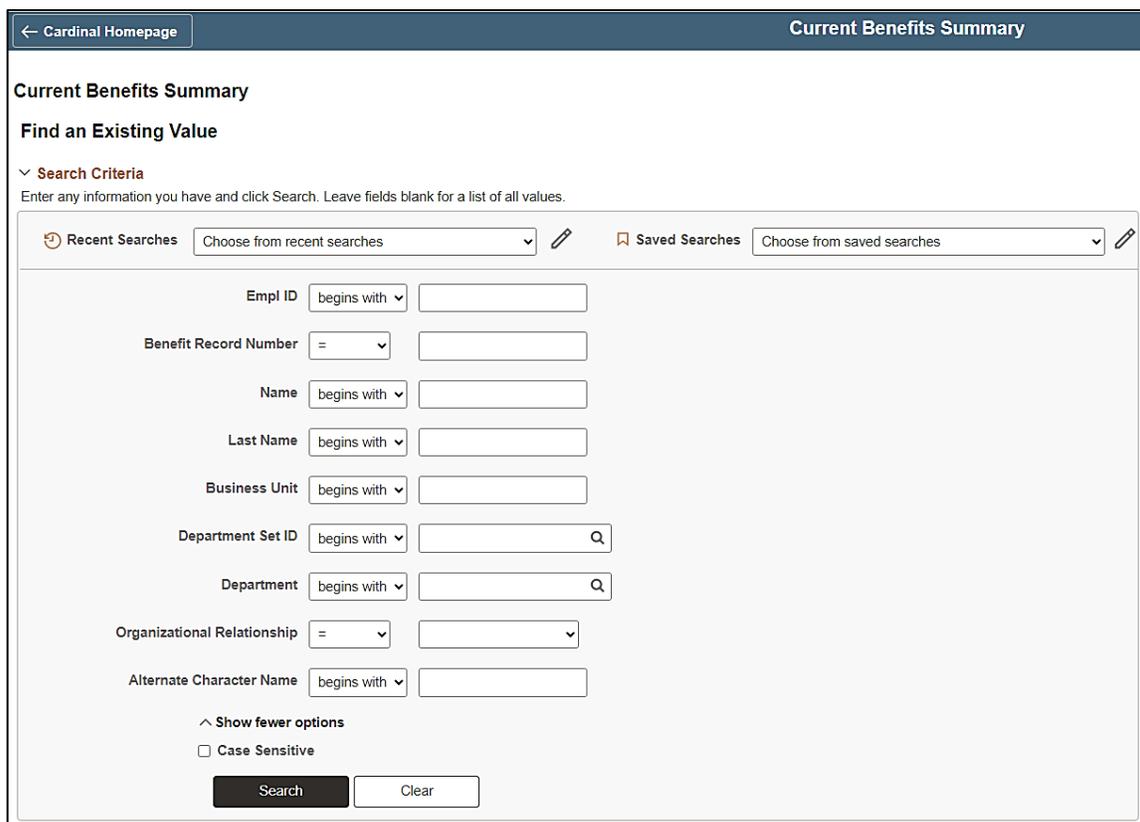
5.	<p>Click the View All link in order to see all of the enrollments and review the information as needed.</p> 
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Reviewing the Current Benefits Summary Page

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.




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.

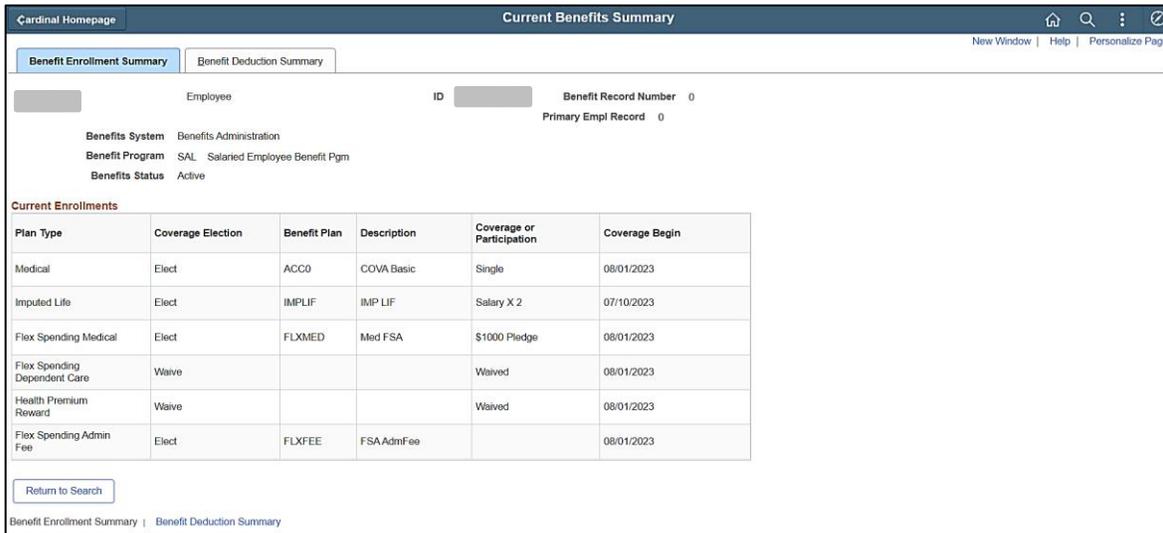


Step	Action
3.	Click the Search button.

Search

Clear

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



The screenshot shows the 'Current Benefits Summary' page with the 'Benefits Enrollment Summary' tab selected. The page displays employee information and a table of current enrollments.

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACCO	COVA Basic	Single	08/01/2023
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	07/10/2023
Flex Spending Medical	Elect	FLXMED	Med FSA	\$1000 Pledge	08/01/2023
Flex Spending Dependent Care	Waive			Waived	08/01/2023
Health Premium Reward	Waive			Waived	08/01/2023
Flex Spending Admin Fee	Elect	FLXFEE	FSA AdmFee		08/01/2023

4.	Review the information as needed.
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5.	Click the Benefit Deduction Summary tab.
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Benefit Enrollment Summary

Benefit Deduction Summary

The **Benefit Deduction Summary** tab displays.



The screenshot shows the 'Current Benefits Summary' page with the 'Benefit Deduction Summary' tab selected. The page displays employee information and payroll details.

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACCO	COVA Basic	Single	08/01/2023
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	07/10/2023
Flex Spending Medical	Elect	FLXMED	Med FSA	\$1000 Pledge	08/01/2023
Flex Spending Dependent Care	Waive			Waived	08/01/2023
Health Premium Reward	Waive			Waived	08/01/2023
Flex Spending Admin Fee	Elect	FLXFEE	FSA AdmFee		08/01/2023

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