



Human Capital Management (HCM)

Benefits Administrator Open Enrollment (OE) Forum

April 24, 2024



Agenda

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OHB Reminders



The Office of Health Benefits Open Enrollment Communications and Resources

Find out what's new in 2024 in the redesigned Spotlight and on DHRM's Open Enrollment webpage!

- Employees received a mailed and electronic copy of [2024 Spotlight Publication](#).
- Use [DHRM's 2024 Open Enrollment webpage](#) to access Spotlight, Summaries of Benefits and Coverage (SBC), Premiums, Important Notices and more.
- Please review detailed guidance provided to BAs:
 - BA Memo #24-01, “Communications and Materials”
 - BA Memo #24-03, “Open Enrollment Instructions”





Supporting Documentation for Newly Enrolled Dependents

- Employees have **60 days** from the end of Open Enrollment to **submit supporting eligibility documentation.**
- Newly added dependents will be in an **Unapproved** Dependent status until the required documentation is provided.
- Dependent(s) **will not have access to health care coverage** until they are updated to an **Approved** Dependent status.
- If the documentation **is received within the 60 days from the end of Open Enrollment**, the agency should reopen the event to change the dependent to **Approved.**
- Making the change directly to the Update Dependent/Beneficiary screen **will not go over on the daily file** to the vendor(s) and access to coverage for the dependent will be delayed.
- If documentation **is not received within 60 days from the end of Open Enrollment**, the agency should reopen the event and update the health benefits enrollment to remove (-) the **Unapproved Dependent and adjust the plan option, if applicable.**

Benefit Eligibility Audits Report (RBN301)

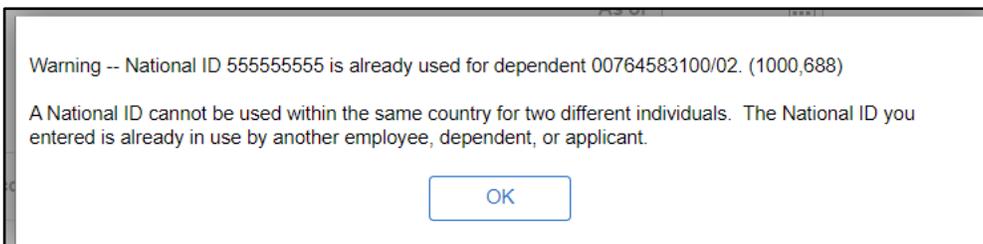
For Open Enrollment, check the Dependents Waiting Approval box to identify Unapproved Dependents.



Dual Enrollment in the State Health Plan

No person can be enrolled in more than one state health benefits plan under any circumstances!

If this warning message appears after entering a dependent SSN, it means that the dependent you are adding to your employee's policy is also listed as a dependent on another person's record in Cardinal.



- The Employee ID of the other person is listed in the warning message.
- If a corresponding election is not made during open enrollment to remove the dependent from the other plan, OHB will run an audit to identify employees/dependents enrolled in two state plans and terminate the coverage effective 07/01/2024 according to policy.



Employee Reminders to Review Open Enrollment Elections

Employees will receive an email to access their confirmation statement in Cardinal after successfully submitting an open enrollment election.

- Employees should review their elections to ensure they are the intended election for the new plan year.
- Employees should check healthcare and FSA deductions for the new plan year on their first paycheck received after July 1.

From: noreply.HRPRD1@doa.virginia.gov <noreply.HRPRD1@doa.virginia.gov>
Sent: Tuesday, May 3, 2022 9:38 PM
To: [Redacted]
Subject: Benefits Confirmation Available

This email is to confirm that a benefit enrollment has been completed in the Cardinal system. Your Benefits Confirmation Statement has been posted on the Employee Self Service website.

To view your statement:

- login to the Cardinal website
- click on Human Capital Management (HCM) link
- navigate to the Benefit Details tile
- click on Benefit Statements
- Select Confirmation Statement as the Statement Type

Open Enrollment Overview



Open Enrollment – Benefits Administrator Timeline

May 1

OE Begins

- Employee Self Service (ESS)
OE opens 12:00 a.m.

May 15

OE Elections Due

- ESS OE closes 11:59 p.m.
- Paper forms due

May 24

OE Events Closed

- Cardinal closes all OE events

May 31

Keying Deadline

- All paper forms must be keyed by 5:30 p.m.

Employee Timeline



Open Enrollment – Employee Log In

Employees must be able to successfully log in to Cardinal to make online OE elections.

- Valid email address in Cardinal is required.
- Incorrect email addresses must be updated by an HR Administrator.
- Once an email address is fixed a job runs every 2 hours (8:00 a.m. – 4:00 p.m.) in Cardinal to grant access. After the job runs the employee will be able to register.
- Cardinal locks users out after 3 failed password attempts.
 - The lockout is reset after 30 minutes.
- If a ticket is needed to resolve an access issue, the Cardinal Security Team answers tickets 8:00 a.m. to 5:00 p.m. Monday-Friday.
- **IMPORTANT:** Employees who have unresolved access issues in Cardinal on the final day of open enrollment should submit a paper form to the agency BA.



Open Enrollment Reminders

Adding Dependents

- Requires BA approval in Cardinal.
- Supporting documentation must be received within 60 days of the end of OE.
- If an employee does not have an SSN for their dependent(s), they can still add their dependent(s) and submit their OE elections in Cardinal.

Flexible Spending Accounts (FSAs)

Medical FSA and Dependent Care FSA elections **do not automatically carry forward**. Re-election is required to continue using these accounts.

- **New for 2024:** The Flexible Spending Administration Fee will be automatically added when a Flexible Spending Account is selected in ESS.

Confirmation Statements

Emailed nightly to employees (with a valid email) when:

- Employee submits online OE elections or makes changes in ESS.
- Benefit Administrator submits OE elections or makes changes on behalf of employee.



Open Enrollment System Changes

Plan Changes

- Optima plan name is now Sentara
- FSA annual election maximum increased to \$3200
- FSA fee enrollment is automatic in Employee Self-Service

Coverage Code/Level Changes

Coverage levels will remain the same for Anthem, Aetna, Sentara, and Kaiser plans

- 1 – Single
- 2 – Self + Spouse
- 3 – Self + Child
- 4 – Family (Employee + 2 or more Dependents)

New for 2024: Tricare plan will have 2 new Coverage Codes

- 1 – Single
- 2 – Self + Spouse
- 8 – Self + Child(ren)
- 9 – Family (Employee + Spouse + Child(ren))



Open Enrollment System Changes (continued)

Confirmation Statements

- Statements (Printed and Online) reflect annual costs
- Printed Statements now will show coverage begin date

New Hires

- From May 1 to June 1, an automated process creates OE Events each night for newly hired employees who qualify.



Piedmont Geriatric Hospital
Salaried Employee Benefit Pgm

CONFIRMATION OF 2024 ELECTIONS
EVENT MAINTENANCE
Statement Issue Date: 02/14/2024

Employee ID: 000[REDACTED]00

This statement confirms your recent benefit elections. These coverages will remain in effect until you experience a change in family status or in your employment situation. If an error has been made in recording your elections, please contact your benefits administrator. Please keep a copy of this form for your records.

PERSONAL INFORMATION

Home Address [REDACTED], AMELIA COURT HOUSE, VA 23002-5809
 Email Address noemail@virginia.gov
 Gender Female
 Marital Status Unknown
 Birthdate [REDACTED]

ELECTION SUMMARY			
Benefit	Coverage	Coverage Begin Date	Your Cost Annually
COVA High Ded Plan + PrevDen	Single	07/01/2023	\$ 0.00
Medical Flex Spending Account		07/01/2024	\$ 500.00
Dependent Care FSA		07/01/2024	\$ 5,000.00
Flex Spending Admin Fee		07/01/2024	\$ 25.20



Important Enrollment Transmission Dates

Premium Rewards

- New plan year premium rewards will be received from the vendor and visible in Cardinal by June 24.

Health Enrollments

- New plan year health elections will be sent to vendors on June 3 and will be visible in the vendors' systems on June 4.
- All agency BAs can see new plan year enrollments at any time by running the Cardinal Enrollment Report with a 07/01/2024 as of date.

FSA Enrollments

- New plan year FSA elections will be sent to the vendor on June 3.



Employee Self-Service Reminders

- Employees must check the box next to each dependent they want to cover **prior** to selecting their medical plan.
- **Important!** If an employee needs to add someone to their health plan who isn't already listed under Enroll Your Dependents, they must click the **Add Dependent** button first.
- Enter the **total FSA contribution for the plan year** (not per paycheck) in the **Annual Pledge** field.

Flex Spending Medical Done

The Health Care Spending Account allows you to use pre-tax dollars to pay for eligible health care expenses. If you selected a Flex Spending Medical Plan, you must elect the Flex Spending Admin Fee.

▼ Enroll in Your Plan

Plan Name

- Select Waive
- ✓ Medical Flex Spending Account

▼ Contribution Amount

Annual Pledge

Minimum \$1.00 Maximum \$2,850.00.
Annual pledge amount for all Flexible Spending Accounts must not exceed \$7,850.00.

Medical Cancel

▼ Enroll Your Dependents

The following list displays all individuals who are eligible for coverage as a dependent. Dependents with a check by their name are currently enrolled on your plan. You may enroll other eligible dependents by checking the box next to their name. If you would like to enroll a new dependent, select Add Dependent below. Once added, you must check the box next to their name to enroll them for the new plan year. NOTE: Please follow up with your agency Benefits Administrator to provide supporting documentation to validate eligibility for all newly enrolled dependents.

Dependents	Relationship
<input checked="" type="checkbox"/> Child Akman	Child

Add Dependent

▼ Enroll in Your Plan

The Single Cost showing is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage cost, select the the

Plan Name	Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
Select Waive				\$0.00
Select COVA HlthAwr + Prev Den	\$26.00		\$634.00	\$26.00
Select COVA HlthAwr + Exp Den&Vis	\$66.00		\$634.00	\$66.00
Select COVA HlthAwr + Exp Den	\$55.50		\$634.00	\$55.50
Select COVA High Ded Plan + PrevDen			\$560.00	\$0.00
Select COVA High Ded Plan + Exp Den	\$30.50		\$560.00	\$30.50
✓ COVA Care + Prev Dental	\$108.50		\$634.00	\$108.50
Select COVACr+Prev Den+Out-of-ntwk	\$125.50		\$634.00	\$125.50
Select COVA Care + Expanded Dental	\$140.00		\$634.00	\$140.00
Select COVA Cr+Exp Den+Out-of-ntwk	\$157.00		\$634.00	\$157.00
Select COVA Cr+Exp Den+Vision&Hrng	\$158.00		\$634.00	\$158.00
Select COVA+ExDen+Out-of-ntwk+Vs&Hr	\$175.00		\$634.00	\$175.00
Select TRICARE	\$60.00			\$60.00

Overview of All Plans

Don't Forget, Click Submit!

[Back](#) Benefit Details

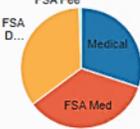
Benefits Enrollment
DHRM Employee Benefits
The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

Enrollment Summary

Your Pay Period Cost **\$360.60** Full Cost **\$360.60**
Employer Cost **\$634.00**

Status **Pending Review**

[Enrollment Preview Statement](#)
[Submit Enrollment](#) 



Benefit Plans

Medical	Flex Spending Medical	Flex Spending Dependent Care
Current: Waive New: COVA Care + Prev Dental Status: ✔ Changed ✖ 1 Dependents	Current: Waive New: Medical Flex Spending Account \$1,000 Status: ✔ Changed	Current: Waive New: Dependent Care FSA \$1,000 Status: ✔ Changed
Pay Period Cost \$108.50 Review	Pay Period Cost \$125.00 Review	Pay Period Cost \$125.00 Review

Flex Spending Admin Fee

Current: Waive
New: Flex Spending Admin Fee
Status: ✔ Changed

Pay Period Cost **\$2.10** Review

Processing OE Events



The Open Enrollment Event

- All employees eligible to participate will have an OE event generated.
- BAs will access the OE event by navigating to the On-Demand Event Maintenance Page.

Navigation: **Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

On-Demand Event Maintenance

Person ID 00 [redacted]00 Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 0 Event Date 07/01/2024 Status Prepared Class OE Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date

Frequency Deduction Frequency Annual Frequency

Election Entry Entered 0 of 4 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify



Keying Paper Open Enrollment Forms

The enrollment steps during Open Enrollment are the same as any other enrollment.

Reminders

- Add and approve dependents from within the OE event.
- Remove dependents using the Election Entry Health Enrollment page; to maintain history **do not delete** the dependent profile.
- The **Enroll All** button can be your best friend but be careful.
- If changes are made to an enrollment (including dependent approvals), a new confirmation statement is generated.
- Benefit Administrators have access to all confirmation statements; employees only see the most recent statement generated for each event.
- Keying errors can be fixed by reopening an event.

Keying Deadline: Friday, May 31, 5:30 p.m.



Reopening an Event





Reopening an Event (continued)

When do I need permission?

Benefit Events should only be reopened by Benefit Administrators within their original enrollment window, except for paperwork received within that window but keyed late.

OE Enrollment Window	Types of Changes
May 1 – May 31	All Changes
May 31 – July 13	Dependent Approvals/Life Event Processing

Exception requests can be made to the Office of Health Benefits (OHB) and must be approved prior to reopening a Benefit Event.



How to Reopen an Event

Navigation: **Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

1. Click the Event Status Update Button.
2. Find the Event that needs to be reopened.
3. Change the Process value from 'Normal Processing' to 'Re-Enter'.
4. Change the Event Status value from 'Closed to Processing' to 'Open for Processing'.
5. Click the **OK** button (you might have to scroll down) to return to the On-Demand Page.
6. Click the **Reprocess** Button.

Before

Update Event Status	
Empl ID
Ben Record	0
Event Status Update ? <input type="text"/> <input type="button" value="1 of 8"/> <input type="button" value="Previous"/> <input type="button" value="Next"/>	
Schedule ID 247COV	<input type="checkbox"/> Address Eligibility Changed
Event Date 07/01/2024 <input type="checkbox"/> Event Disconnected	<input type="checkbox"/> MultiJob Indicator Changed
Event ID 0	<input type="checkbox"/> Job Eligibility Changed
Event Class OE Open Enrollment	<input type="checkbox"/> Event Out of Sequence
Event Priority 900	<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program SAL	Print Option <input type="text" value="Print Confirmation Forms Only"/>
Process Status Prepared	*Process <input type="text" value="Normal Processing"/>
Action Source Open Enrollment	*Event Status <input type="text" value="Closed to Processing"/>

After

Update Event Status	
Empl ID
Ben Record	0
Event Status Update ? <input type="text"/> <input type="button" value="1 of 8"/> <input type="button" value="Previous"/> <input type="button" value="Next"/>	
Schedule ID 247COV	<input type="checkbox"/> Address Eligibility Changed
Event Date 07/01/2024 <input type="checkbox"/> Event Disconnected	<input type="checkbox"/> MultiJob Indicator Changed
Event ID 0	<input type="checkbox"/> Job Eligibility Changed
Event Class OE Open Enrollment	<input type="checkbox"/> Event Out of Sequence
Event Priority 900	<input type="checkbox"/> Finalize/Apply Defaults
Benefit Program SAL	Print Option <input type="text" value="Print Confirmation Forms Only"/>
Process Status Prepared	*Process <input type="text" value="Re-Enter"/>
Action Source Open Enrollment	*Event Status <input type="text" value="Open for Processing"/>

New Hires & Life Events



Why Would a New Hire Need an OE Event?

NEW! We have automated the creation of OE Events for those hired between May 1st – June 1st each night a process will run and create OE Events for eligible newly hired employees.

Scenario: An employee hired May 26 wants to enroll in Medical FSA as of June 1 for \$200.00 and then wants their annual election for the new plan year to be \$3200.00.

Enrollment Actions Needed:

- Employee is enrolled in a \$200.00 Medical FSA on the Hire Event.
- Upon successful initial hire enrollment, employee is also enrolled in the OE Event for the new plan year maximum FSA election of \$3200.00.

IMPORTANT: Refer to BA Memo “#24-03” for information on processing new hires during open enrollment.



New Hire Open Enrollment OHB Guidelines

Newly eligible employees hired after the OE period cannot make a separate or different health care election to begin July 1, 2024.

- Their initial health care election will continue to be in effect for the new plan year that begins July 1, 2024.
- Employees with a May 1 or June 1 hire date may make a separate election to enroll in one or both FSA's by submitting a paper enrollment form after open enrollment ends for the new plan year to begin July 1.
 - The form must be received within the newly eligible window.



Enrolling New Hires During Open Enrollment

An employee with a HIR and an OE event will look the same as any other hire on the On-Demand page.

1. Enroll the employee in their new hire benefits and when complete, click the **Validate/Finalize** button as you do with each enrollment.
2. Click the **Return to Search** Button and then select the employee again.

The screenshot displays the 'On-Demand Event Maintenance' interface for 'Jane Employee'. The interface includes the following elements:

- Employee Information:** Jane Employee, Person ID 00861759600, Ben Record 0.
- Activity Summary:** Activity Date, Source, Empl Record 0. Buttons: Schedule/Prepare Activity, Pending Activities 0, Show Activities, Action.
- Event Details:** Event ID 2, Event Date 05/06/2024, Status Prepared, Class HIR. Buttons: Prepare Options, Enrollment Statement, Run Date, Event Status Update.
- Frequency:** Event Status Open for Processing. Radio buttons: Deduction Frequency (selected), Annual Frequency.
- Processing Summary:** Election Entry, Entered 0 of 5, Show Plans, Show Errors, Finalize/Apply Defaults (checkbox).
- Validation:** Validate/Finalize, Errors 0, Confirmation Statement, Run Date.
- Process Control:** Reprocess, Process Indicator N, Normal Processing.
- Navigation:** Save, Return to Search, Notify.



Enrolling New Hires During Open Enrollment (continued)

3. The employee's OE Event is now displayed on the On-Demand Page.
4. Click the **Prepare Options** button to prepare the OE Event for data entry.
5. Once prepared, the **Election Entry** button will be available for you to enter the employee's new plan year elections.

On-Demand Event Maintenance

Jane Employee Person ID 00861759600 Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 0 Event Date 07/01/2024 Status Program Elig Assigned Class OE Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date Frequency

Deduction Frequency Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify



New Hire Benefit Events in Employee Self-Service

Employees hired between May 1 - 15 will see:

- Initial Enrollment
- Open Enrollment

After May 15, they will only see the new hire event (Initial Enrollment).

Cardinal Homepage Benefit Details Home Search More

Jack Employee
Health Benefits Only

Benefits Enrollment

After your initial enrollment, the only time you may change your benefit choices is during open enrollment or a life event. The information icon provides you with additional information about your enrollment. The Start button next to an event means it is currently open for enrollment. Use the Start button to begin your enrollment.

Note: Some events may be temporarily closed until you have completed enrollment for a prior event.

Your Benefit Events

Event Description		Event Date	Event Status	Job Title	
Initial Enrollment	i	05/06/2024	Open	Health Benefits Only	<input type="button" value="Start"/>
Open Enrollment	i	07/01/2024	Closed	Health Benefits Only	



Life Event Changes and Open Enrollment

Special care needs to be taken when processing Life Events that happen between May 1 and July 1 to ensure that benefits are correct with both Cardinal and the vendors.

Before making any change to the employee's benefits it is imperative to have a complete picture of any changes the employee made for Open Enrollment (OE).

To review elections, navigate to:

Health: Benefits > Enroll In Benefits > Health Benefits

FSA: Benefits > Enroll In Benefits > Spending Accounts



Demo
Open Enrollment Events

Reports & Queries



Benefit Eligibility Audits/Dependent Waiting Approval

Navigation: Menu > Benefits > Reports > Audits > Benefit Eligibility Audits

Use the Dependent Waiting Approval report to identify dependents added during Open Enrollment that still require approval and supporting documentation.

Benefit Eligibility Audits

Run Control ID: Dependent_Approval_Report Report Manager Process Monitor **Run**

Process Request Parameter(s)

Company (Leave Blank for All)

- Dependent Waiting Approval**
- Retired, Tricare and TLC Employees Approaching 65
- Dependent of Retirees/Tricare, TLC employees Approaching 65
- Dependent Child Approaching 26
- Disabled Over-Age Dependent Child

Save **Notify** **Add** **Update/Display**



OE Incomplete Election Query

Navigation: Menu > Reporting Tools > Query > Query Viewer > V_BN_OE_ELECT_NO_SUBMIT

Returns a list of employees who made an election on their Open Enrollment event using Employee Self-Service (ESS) but did not click the submit enrollment button.

- Follow up with employees on this list prior to Wednesday, May 15

V_BN_OE_ELECT_NO_SUBMIT - OE Incomplete Election Query

Business Unit (Optional): Q

Company (Optional): Q

[View Results](#)

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (177 kb)

View All First 1-100 of 200 Last

Row	Event ID	Business Unit	Company	Description	Enroll	Enroll Recs	First Name	Middle Name	Last Name	Event Status	Status Date	Process Status	Election Made	Event	SA Name	SA Event
1	23700V	99900	ABC	Alcoholic Beverage Control		0				Open	05/11/2023	Notified	Y			
2	23700V	99900	ABC	Alcoholic Beverage Control		0				Open	05/15/2023	Notified	Y			
3	23700V	99900	ABC	Alcoholic Beverage Control		0				Open	05/03/2023	Notified	Y			
4	23700V	99900	ABC	Alcoholic Beverage Control		0				Open	05/10/2023	Notified	Y			
5	23700V	99900	ABC	Alcoholic Beverage Control		0				Open	05/12/2023	Notified	Y			
6	23700V	75400	ACC	Augalia Correctional Center		0				Open	05/10/2023	Notified	Y			
7	23700V	30100	ACB	Agriculture & Consumer Svcs		0				Open	05/12/2023	Notified	Y			
8	23700V	30100	ACB	Agriculture & Consumer Svcs		0				Open	05/14/2023	Notified	Y			
9	23700V	30100	ACB	Agriculture & Consumer Svcs		0				Open	05/10/2023	Notified	Y			
10	23700V	22900	ACB	Coop Extension & Agr Experiment		0				Open	05/09/2023	Notified	Y			
11	23700V	28200	ARS	Dept for Aging & Rehab Svcs		0				Open	05/13/2023	Notified	Y			
12	23700V	28200	ARS	Dept for Aging & Rehab Svcs		0				Open	05/09/2023	Notified	Y			
13	237TLC	LOCAL	B68	New River Valley Center Services		1				Open	05/11/2023	Notified	Y			
14	23700V	71800	BCC	Stand Correctional Center		0				Open	05/05/2023	Notified	Y			
15	23700V	71800	BCC	Stand Correctional Center		1				Open	05/15/2023	Notified	Y			
16	23700V	72000	BHD	Dept Behavioral Health/Develop		0				Open	05/15/2023	Notified	Y			
17	23700V	72000	BHD	Dept Behavioral Health/Develop		0				Open	05/15/2023	Notified	Y			
18	23700V	60600	BPD	W. Board People w/Disabilities		0				Open	05/15/2023	Notified	Y			
19	23700V	74900	BUC	Buckingham Correctional Center		0				Open	05/10/2023	Notified	Y			
20	23700V	74900	BUC	Buckingham Correctional Center		0				Open	05/11/2023	Notified	Y			
21	23700V	70200	BVI	Dept for Blind/Vison Impaired		0				Open	05/14/2023	Notified	Y			
22	237TLC	LOCAL	CB7	Winchester, City Of		2				Open	05/15/2023	Notified	Y			
23	23700V	72450	CAT	Catawba Hospital		0				Open	05/10/2023	Notified	Y			
24	23700V	72450	CAT	Catawba Hospital		0				Open	05/10/2023	Notified	Y			



Cardinal Enrollment Report (RBN350)

Navigation: Menu > Benefits > Reports > Cardinal Enrollment

Provides employee benefit enrollment information including health, FSA, premium reward, and medical premiums.

The report includes:

- Active/LOA/Suspended employees
- Terminated employees

Note: Terminated employees remain on the report for 90 days from date of termination.

The screenshot shows the 'Cardinal Enrollment Report' interface. At the top left is the Cardinal logo. The main title is 'Cardinal Enrollment Report'. Below the title, there is a 'Run Control ID' field containing 'CARDINAL_ENROLLMENT_RPT'. To the right of this field are links for 'Report Manager' and 'Process Monitor', and a 'Run' button. Below this is a 'Run Control Parameters' section with three input fields: '*As Of Date' (with a calendar icon), 'Business Unit (Optional)' (with a search icon), and 'Company (Optional)' (with a search icon). At the bottom of the form are three buttons: 'Save', 'Add', and 'Update/Display'.



Benefit Enrollment Changes Report (RBN287)

Navigation: Menu > Benefits > Reports > Benefit Enrollment Changes

Lists all employees who enrolled in benefits or made changes to existing benefits within a specific date range.

Note: On the Benefit Enrollment Changes Report **Run Control Page** the From Date and To Date fields are required fields. At least one Plan Type must be selected.

Example: Benefit Enrollment Changes Report

EMPID		BEN RCD	NAME	PLAN TYPE	BENEFIT PLAN	DATE OF ACTION	FIELD CHANGED	PRIOR VALUE	CURRENT VALUE
		0		10	002KA500C	01/13/2021	Coverage Begin Date	09/01/2018	12/01/2020
		0		10	002KA500C	01/13/2021	Coverage Code	Family	EE+Spouse
		0		10	002KA500C	01/13/2021	Coverage Elect Date	08/04/2020	01/13/2021

Questions?

Support



Job Aids

All training support materials are posted to the [Cardinal website](#) and available for users. Below are key job aids to have on hand during Open Enrollment:

[BN361 Benefits Event Status Report](#) – instructions on how to run this report, which lists all participants in a particular process status or set of status levels. This document also includes common error results shown on the report and how to troubleshoot each one.

[BN361 Open Enrollment Life Event](#) – guidance on the actions a Benefits Administrator (BA) must take when adding a Life Event during Open Enrollment (OE). These actions will ensure that the life event changes are reflected in the OE elections and are transmitted to the vendors.

[BN361 Reopening and Reprocessing a Benefit Event](#) – step-by-step instructions for the BA to reopen and reprocess a Benefit Event after the Benefit Event has been validated and finalized.

[BN361 Enrollment Steps for an Employee](#) – walkthrough of the enrollment steps for an employee through both New Hire and Open Enrollment processes in Cardinal ESS.

[BN361 Managing and Approving Dependents](#) – step-by-step instructions on how to generate the Dependent Waiting Approval Eligibility Audit report to review unapproved dependents and instructions on how to reopen a benefit event to approve dependents.



Reports & Queries

Report/Query Name	Open Enrollment Use	Description
Benefit Eligibility Audits Reports (RBN301)	Monitor new added dependents requiring approval.	Select the Dependent Waiting Approval check box to return a list of dependents that are currently pending approval.
Benefit Enrollment Changes Report (RBN287)	Review employees who made open enrollment elections.	Lists all employees who enrolled in or made changes to benefits within a specific date range.
Cardinal Enrollment Report (RBN350)	Review detailed employee enrollment information.	Provides employee benefit enrollment information including health, FSA, premium reward, and medical premiums for the following: <ul style="list-style-type: none">• Active employees• Employees on paid or unpaid leave• Suspended employees• Employees enrolled in COBRA• Terminated employees (within 90 days of term date)
V_BN_OE_ELECT_NO_SUBMIT OE Incomplete Election Query	Monitor & follow up with employees who forgot to click the submit button in ESS.	Returns a list of employees who made an election on their OE event using ESS but did not click the Submit Enrollment button.

Need help running a report or query? Use the [Generating an HCM Report](#) and the [Running an HCM Query](#) job aids for guidance.



DHRM OE Website & Resources

dhrm.virginia.gov/employeebenefits/open-enrollment-2024-25

- [2024 Spotlight Publication](#)
- [Fillable Enrollment Form](#)
- [Benefits At A Glance](#)

Site also includes:

- Health Plan Brochures
- Dental and Vision Information
- Premium and Premium Rewards Information
- Flexible Spending Account Information (State Employees Only)



2024-25 Open Enrollment

No action is required if you have no health plan-related changes, are not enrolling in an FSA, or do not plan to participate in Premium Rewards.



[See Spotlight on Your Benefits](#)

[Spotlight on Your Benefits Spanish Version](#)

Premium and Premium Rewards	Flexible Spending Accounts
Benefits At A Glance	Enrolling And Making Changes



DHRM/OHB Support

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 [Agency Request for Assistance Form](#) is available on the DHRM website.

Open Enrollment questions:

Email: openenrollment@dhrm.virginia.gov

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



Cardinal OE Website & Resources

cardinalproject.virginia.gov/oe

- [Open Enrollment Tutorial Video](#)
- [Cardinal's Quick Guide to Open Enrollment](#)
- [ESS How to Make Open Enrollment Elections job aid](#)



Search (for job aids, videos, or other sup

Home / Open Enrollment

2024 Open Enrollment

Each year, during Open Enrollment (OE, for short), you may make health plan changes.

Note: If you are a state employee, you may enroll in or renew a Flexible Spending Account (FSA).

Enrolling or Changing Benefits?

- Submit your OE updates using Cardinal HCM. Use the links below to help you step-by-step, or
- Complete an enrollment form and submit it to your Benefits Administrator.

No Enrollments or Changes? No action is required if you have no changes to your health plan or you are not enrolling in an FSA (remember - you must re-enroll in an FSA each year).

Questions? See your Benefits Administrator.

Misplaced your Employee **Spotlight** newsletter? Need information on Premiums, Summaries of Benefits and Coverage (SBC), and/or the 2024 Enrollment Form? Visit [DHRM's Open Enrollment](#) page for support resources.



State Employees

CARDINAL'S QUICK GUIDE TO OPEN ENROLLMENT >

OPEN ENROLLMENT TUTORIAL VIDEO >

ESS_HOW TO MAKE OPEN ENROLLMENT ELECTIONS JOB AID >



Cardinal Support

- Is a page not working?
- Need support with Cardinal functions?
- Login issues?

Submit a help desk ticket by emailing vccc@vita.virginia.gov and include the following information:

Subject: Cardinal - <brief summary for routing>

Email Contents:

- Detailed information about your issue (i.e., page, actions, error).
- Agency name and business unit **or** Locality name and 9-digit DHRM Group Number
- Name, email address, and best contact phone number.



Thank You for Attending

Cardinal

Appendix



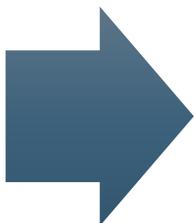
Open Enrollment – Cardinal Log In FAQs

I forgot my Username, how do I retrieve it?



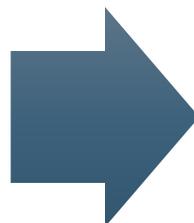
To reset your Cardinal Password, click “Forgot Username”. Enter email address and re-Captcha

I forgot my Password, how do I reset it?



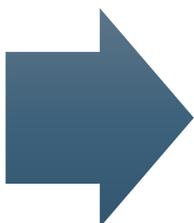
To reset your Cardinal Password, click “Forgot Password”. Enter email address and re-Captcha

What should I do if I’ve locked myself out?



You will receive an email indicating when your account will be unlocked and instructions for next steps

What should I do if I can’t remember my security question?



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



**Cardinal ESS
Online Open Enrollment**



ESS - Online Open Enrollment

On the Cardinal Homepage, click the Benefit Details tile.

- Select **Benefits Enrollment** from the menu.
- Click **Start** next to Open Enrollment under Your Benefit Events.

The page will display all available benefit plans the employee can select during Open Enrollment.

To begin making elections for each plan, the employee will click the corresponding tile.

Benefit Details

Admin and Office Spec III

Benefits Enrollment

Your Benefit Events

Event Description	Event Date	Event Status	Job Title
Open Enrollment	07/01/2024	Open	Admin and Office Spec III

Start

Benefit Details

Benefits Enrollment
DHRM Employee Benefits

The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.

▼ Enrollment Summary

Your Pay Period Cost \$0.00 Full Cost \$0.00
 Status Pending Review Employer Cost \$0.00

Enrollment Preview Statement
 Submit Enrollment

Benefit Plans

Medical

Current Waive
New Waive
Status Pending Review
0 Dependents

Pay Period Cost \$0.00 Review

Flex Spending Medical

Current Waive
New Waive
Status Pending Review

Pay Period Cost \$0.00 Review

Flex Spending Dependent Care

Current Waive
New Waive
Status Pending Review

Pay Period Cost \$0.00 Review

Flex Spending Admin Fee

Current Waive
New Waive
Status Pending Review

Pay Period Cost \$0.00 Review



ESS – Enrolling in a Medical Plan

Dependents: A checkbox will be available for each dependent. Select the box next to each dependent who needs coverage under the medical plan.

- **Important!** If an employee needs to add someone to their health plan who isn't already listed under Enroll Your Dependents, they must click the **Add Dependent** button first

Plan Selection: Available medical plans are listed, click the **Select** button next to the desired plan.

- Detailed information about each plan is available by clicking the information icons or the resource links.

Click **Done** make selections.

Enroll Your Dependents

The following list displays all individuals who are eligible for coverage as a dependent. Dependents with a check by their name are currently enrolled on your plan. You may enroll other eligible dependents by checking the box next to their name. If you are removing a dependent, you will need to uncheck the box next to their name. If you would like to enroll a new dependent, select Add Dependent below. Once added, you must check the box next to their name to enroll them for the new plan year. NOTE: Please follow up with your agency Benefits Administrator to provide supporting documentation to validate eligibility for all newly enrolled dependents.

Dependents	Relationship
<input checked="" type="checkbox"/> Child Akman	Child

Add Dependent

Enroll in Your Plan

The Single Cost showing is based on the dependents enrolled. Plans that do not offer coverage for the dependents enrolled are not available to select. To see other coverage cost, select the help icon next to each plan option.

Plan Name	Cost (Before Tax)	Cost (After Tax)	Employer Cost	Pay Period Cost
<input checked="" type="checkbox"/> Waive				\$0.00
<input type="checkbox"/> Select COVA HlthAwr + Prev Den	\$26.00	\$634.00	\$634.00	\$26.00
<input type="checkbox"/> Select COVA HlthAwr + Exp Den&Vis	\$66.00	\$634.00	\$634.00	\$66.00
<input type="checkbox"/> Select COVA HlthAwr + Exp Den	\$55.50	\$634.00	\$634.00	\$55.50
<input type="checkbox"/> Select COVA High Ded Plan + PrevDen	\$560.00	\$560.00	\$560.00	\$0.00
<input type="checkbox"/> Select COVA High Ded Plan + Exp Den	\$30.50	\$560.00	\$560.00	\$30.50
<input type="checkbox"/> Select COVA Care + Prev Dental	\$108.50	\$634.00	\$634.00	\$108.50
<input type="checkbox"/> Select COVAC+Prev Den+Out-of-ntwk	\$125.50	\$634.00	\$634.00	\$125.50
<input type="checkbox"/> Select COVA Care + Expanded Dental	\$140.00	\$634.00	\$634.00	\$140.00
<input type="checkbox"/> Select COVA Cr+Exp Den+Out-of-ntwk	\$157.00	\$634.00	\$634.00	\$157.00
<input type="checkbox"/> Select COVA Cr+Exp Den+Vision&Hmg	\$158.00	\$634.00	\$634.00	\$158.00
<input type="checkbox"/> Select COVA+ExDen+Out-of-ntwk+Vs&Hr	\$175.00	\$634.00	\$634.00	\$175.00
<input type="checkbox"/> Select TRICARE	\$60.00	\$60.00		\$60.00

Resources

- COVA HealthAware
- Anthem
- Tricare

Done



ESS – Electing Flexible Spending Accounts

Two types of Flexible Spending Accounts are available to state employees: Flex Spending Medical and Flex Spending Dependent Care.

- Employees **must** complete the re-election for each account that they participate in.

Click the corresponding FSA tile to begin the account enrollment.

- Click **Select** above the plan.
- Enter the **total FSA contribution for the plan year** (not per paycheck) in the **Annual Pledge** field.
- Click **Done**. Repeat for any other FSA account.



ESS - Confirm & Submit Open Enrollment Elections

Employees can view their elections on the Benefits Enrollment page.
They should review the following:

- **Your Pay Period Cost**
- **Medical Tile**
 - Status
 - Total # of Dependents
- **Flex Spending Medical**
 - Status
 - Pay Period Cost
- **Flex Spending Dependent Care**
 - Status
 - Pay Period Cost

The screenshot displays the 'Benefits Enrollment' page for DHRM Employee Benefits. The page title is 'Benefit Details'. Below the title, it states 'DHRM Employee Benefits' and 'The Enrollment Overview displays which benefit options are open for edits. All of your benefit changes will be effective the date of the open enrollment event.'

The 'Enrollment Summary' section shows 'Your Pay Period Cost \$360.60' (highlighted in a red box), 'Status Pending Review', 'Full Cost \$360.60', and 'Employer Cost \$634.00'. There are buttons for 'Enrollment Preview Statement' and 'Submit Enrollment'. A pie chart shows the cost breakdown: FSA Fee, FSA D..., Medical, and FSA Med.

The 'Benefit Plans' section is divided into four tiles:

- Medical:** Shows 'Current Waive' and 'New COVA Care + Prev Dental' with 'Status Changed' and '1 Dependents'. The 'Pay Period Cost' is \$108.50.
- Flex Spending Medical:** Shows 'Current Waive' and 'New Medical Flex Spending Account \$1,000' with 'Status Changed'. The 'Pay Period Cost' is \$125.00.
- Flex Spending Dependent Care:** Shows 'Current Waive' and 'New Dependent Care FSA \$1,000' with 'Status Changed'. The 'Pay Period Cost' is \$125.00.
- Flex Spending Admin Fee:** Shows 'Current Waive' and 'New Flex Spending Admin Fee' with 'Status Changed'. The 'Pay Period Cost' is \$2.10.

If everything is correct, click the **Submit Enrollment** button.

Life Events and Open Enrollment



Processing Life & Open Enrollment Events

Special care needs to be taken when processing Life Events that happen between May 1 and July 1 to ensure that benefits are correct with both Cardinal and the vendors.

Before making any change to the employee's benefits it is critical to have a complete picture of any changes the employee made for Open Enrollment (OE).

To review elections, navigate to:

Health: Benefits > Enroll In Benefits > Health Benefits

FSA: Benefits > Enroll In Benefits > Spending Accounts



Health Benefits Page

Health Benefits

JOHN SMITH Employee ID 00123456700 Benefit Record Number 0

Plan Type 10 Medical

Coverage 1 of 2

*Coverage Begin Date 07/01/2023 *Deduction Begin Date 07/01/2023

Coverage Election: Elect Waive Terminate *Election Date 05/15/2023

Benefit Program SalBenPrgm
Benefit Plan ACC0 COVA Care + Prev Dental Option Code 27
Coverage Code 3 Self + Child
Health Provider ID Previously Seen

Employee Status Active

[Enroll All Dependents](#)

Dependent/Beneficiaries 1-1 of 1

*ID	Name	Relationship to Employee	Health Provider ID	Prev Seen	Covered Person Type	Age Limit Flg
01	SMITH, JANE	Child	<input type="text"/>	<input type="checkbox"/>	Child	Y

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)



Spending Account Page

Spending Accounts

JOHN SMITH Employee ID 00123456700 Benefit Record Number 0

Plan Type 1 of 2 [View All](#)

Plan Type 60 Flex Spending Medical + -

Coverage 1 of 2 [View All](#)

*Coverage Begin Date 07/01/2023 🔄 *Deduction Begin Date 06/25/2023 🔄 + -

Coverage Election Elect Waive Terminate 🔄 *Election Date 05/08/2023 🔄 + -

Benefit Program Salaried Employee Benefit Pgm
Benefit Plan FLXMED 🔍 Medical Flex Spending Account Option Code 1

Contribution Level

Annual Pledge \$900.00
Credit Rollover Included in Pledge \$0.00
Employee Contribution Override Monthly

Account Information

FSA Account Status Active
Contributions YTD \$0.00
Employee Status Active

Carryforward

Carryover Amount 0.00

[Save](#) [Return to Search](#) [Notify](#) [Refresh](#) [Update/Display](#) [Include History](#) [Correct History](#)

Toggle Between Health and Dependent FSA (points to right arrow in Plan Type section)

Toggle Between Coverage Enrollment Dates (points to right arrow in Coverage section)



Current Benefit Summary

Why do I have to use the Health and FSA pages, why not just look at the Current Benefit Summary page?

The **Current Benefit Summary** page **only** shows the benefits the employee has on the day you look up the information. It **does not display** future dated elections.

Benefit Enrollment Summary		Benefit Deduction Summary			
JOHN SMITH	Employee	ID 00123456700	Benefit Record Number 0		
			Primary Empl Record 1		
Benefits System	Benefits Administration				
Benefit Program	SAL Salaried Employee Benefit Pgm				
Benefits Status	Active				
Current Enrollments					
Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACC2	COVA EXD	Family	06/01/2023
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	05/25/2023
403(b)	Terminate				05/25/2023
Section 457	Terminate				05/25/2023
VRS Hb Vol Defined Contr	Elect	HVC000	HVC000	Employer Funded	06/01/2023
Flex Spending Medical	Waive			Waived	06/01/2023
Flex Spending Dependent Care	Waive			Waived	06/01/2023



Processing Life & Open Enrollment Events

1. Enter the Life Event on the Benefit Event Entry page.
2. Navigate to the On-Demand Event Maintenance page, make the life event updates then finalize the event.
3. Reopen the OE Event and note the elections made.
4. Refresh the OE Event and then re-elect the benefits you had noted the employee made.

Note: If an employee is making a change to healthcare on the Life Event and the Open Enrollment Event you **MUST wait a day** between steps 3 and 4 to **allow for the vendor** to be notified of the Life Event change before you make the OE change.