

Researching Benefit Events Overview

This Job Aid provides Benefit Administrators with an overview of resources that can be used to research Benefit Events and troubleshoot some of the commons errors received while processing Benefit Events.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes 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 (<u>Section 1</u> , after Step 1; <u>Section</u> <u>2</u> , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid. |



Monitoring Benefit Events on the Event Status Update Page

This section of the Job Aid provides guidance on how to monitor the status of a Benefit Event on the **Event Status Update** page.

| Step | Action |
|------|--|
| 1. | First, navigate to the On-Demand Event Maintenance page using the following path: |
| | NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance |

The **On-Demand Event Maintenance Find an Existing Value** page displays.

| ← Cardinal Home | age On-Demand Event Maintenance |
|--|---|
| On-Demand Ev | ant Maintenance |
| Find an Existir | g Value |
| ✓ Search Criteria Enter any information | you have and click Search. Leave fields blank for a list of all values. |
| 🕙 Recent Sear | hes Choose from recent searches V Saved Searches Choose from saved searches V |
| | Empl ID begins with |
| | |
| | Last Name begins with v |
| | Second Last Name begins with V |
| Alter | tate Character Name begins with 🖌 |
| | Show fewer options Case Sensitive |
| | Search Clear |
| | |
| For m "Over Webs | ore information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titl view of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal ite in Job Aids under Learning . |
| Enter | |
| Searc | the employee's Employee ID in the Empl ID field. |
| to use | the employee's Employee ID in the Empl ID field. hes can also be performed using the employee's name. However, it is recommended the Employee ID as every employee will have a unique Employee ID. |
| to use | the employee's Employee ID in the Empl ID field. thes can also be performed using the employee's name. However, it is recommended the Employee ID as every employee will have a unique Employee ID. |
| to use | the employee's Employee ID in the Empl ID field. thes can also be performed using the employee's name. However, it is recommended the Employee ID as every employee will have a unique Employee ID. pl ID begins with ~ |



| | Action | | | | |
|-----|----------------------------|---------------------|------------------------|------------------------|-----------------------------|
| ו-D | emand Event M | laintenanc | e page displays | for the applicable | e employee. |
| < | Cardinal Homepage | | | | On-Demand Event Maintenance |
| 0 | n-Demand Event Maintenand | e | | | |
| F | Peanut Butter | | Person ID 00863 | 006400 Ben Record 0 | |
| | Activity Date | Source | | Empl Record 0 | |
| | Schedule/Prepare Activity | Pending Activities | 0 Show Activities | Action | |
| | Event ID 0 Event Date | Sta | atus Class | Event Status Update | |
| | Prepare Options | | Event Status | | |
| | Enrollment Statement | Run Date | Frequency | | |
| | | | Deduction Frequency | Annual Frequency | |
| | Election Entry | Entered 0 of 0 | Show Plans | | |
| | Validate/Finalize | Errors 0 | Show Errors | inalize/Apply Defaults | |
| | Confirmation Statement | Run Date | | | |
| l | Reprocess | Process Indicator N | | | |
| | Save Return to Search Noti | fy | Normal Processing | | |
| L | | | | | |
| | Click the Event | Status Ur | date button | | |
| | | | | | |
| | Activity Date | | Source | | Empl Record 0 |
| | Schedule/Prepare | Activity | Pending Activities 0 | Show Activities | Action |
| | | | | | |
| | Event ID 0 | Event Date | Status | Class | Event Status Update |
| | Prepare Optio | ons | | Event Status | |
| | Enrollment State | ement Ru | un Date | Frequency | |
| | | | | Deduction Frequency | Annual Frequency |
| | | | | | |



Step /

Action

The Event Status Update page displays.

| Empl ID 0086300640 | D Peanut Butter | Ben | Record 0 | | |
|-----------------------|-------------------------------|---------------|-------------------------------|---|---------|
| Event Status Update ③ | | | Q 1 of 3 V) | ► | |
| Schedule ID | EM00 | | Address Eligibility Changed | | |
| Event Date | 08/01/2024 Event Disconnected | | MultiJob Indicator Changed | | |
| Event ID | 3 | | Job Eligibility Changed | | |
| Event Class | MAR Marriage | | Event Out of Sequence | | |
| Event Priority | 420 | | Finalize/Apply Defaults | | |
| Benefit Program | SAL | Print Option | Print Confirmation Forms Only | ~ | |
| Process Status | Finalized - Enrolled | *Process | Normal Processing | ~ | |
| Action Source | Manual Event | *Event Status | Closed to Processing | ~ | |
| Schedule ID | EM00 | | Address Eligibility Changed | | |
| Event Date | 07/10/2024 Event Disconnected | | MultiJob Indicator Changed | | |
| Event ID | 1 | | Job Eligibility Changed | | |
| Event Class | HR2 Immediate Enrollment | | Event Out of Sequence | | |
| Event Priority | 99 | | Finalize/Apply Defaults | | |
| Benefit Program | SAL | Print Option | Suppress Print of Both Forms | ~ | |
| Process Status | Finalized - Enrolled | *Process | Normal Processing | ~ | |
| Action Source | Manual Event | *Event Status | Closed to Processing | ~ | |
| Schedule ID | EM00 | | Address Eligibility Changed | | |
| Event Date | 07/10/2024 Event Disconnected | | MultiJob Indicator Changed | | |
| Event ID | 2 | | Job Eligibility Changed | | |
| Event Class | HIR Initial Enrollment | | Event Out of Sequence | | |
| Event Priority | 100 | | Finalize/Apply Defaults | | |
| Benefit Program | SAL | Print Option | Print Both Forms | ~ | |
| Process Status | Finalized - Enrolled | *Process | Normal Processing | ~ | |
| Action Source | Job Data Change | *Event Status | Closed to Processing | ~ | |
| OK Cancel | Apply | | | | Refresh |





| Step | Action | |
|------|--|---|
| | Schedule ID EM00 Event Date 08/01/2024 Event ID 3 Event Class MAR Marriage Event Priority 420 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event • The Event Class field identifies the system (the first day of the following Month base) The Event Class field identifies the type example) The Benefit Program field identifies the time the Benefit Event was processed The Process Status field identifies the conducting a Benefit Event and can result Process Statuses Overview section of the and a description for each along with solution process (Process Indicator) for the Benefit Process Indicators and a description The Event Status field identifies the current the Statuses Overview section of the and a description for each along with solution process (Process Indicator) for the Benefit Process Indicators and a description for each one | Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults Print Option Print Confirmation Forms Only Process Normal Processing tevent Status Closed to Processing tevent Status of the Benefit Date and on the date of marriage in this example) of Benefit Event ("MAR Marriage" in this Benefit Program that the employee was in at ad urrent process status of the Benefit Event. Ess, there are a series of actions taken in It in various Process Statuses. See the his Job Aid for a list of the Process Statuses me potential reasons for the Process Status on executed by the Benefits Administration efit Event. Typically, this will reflect "Normal s Overview section of this Job Aid for a list of for each one ent Event Status for the Benefit Event. See this Job Aid for a list of the Event Statuses |
| 1 | Schedule ID EM00 Event Date 08/01/2024 Event ID 3 Event Class MAR Marriage Event Priority 420 Benefit Program SAL Process Status Finalized - Enrolled Action Source Manual Event There are also a series of Benefit Event flags th systematically assign. These occur when change after a Benefit Event has been processed. These Event may need to be re-processed. See the F this Job Aid for additional information pertaining | Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults Print Option Print Confirmation Forms Only *Process Normal Processing *Event Status Closed to Processing at the Benefits Administration process may ges, insertions, or deletions have occurred se Benefit Event flags indicate that a Benefit Clagged Benefit Events Overview section of to these Benefit Event flags. |



Overview of the Employee Event Detail Page

This section of the Job Aid provides guidance on how to review details related to the nature and status of a Benefit Event on the **Employee Event Details** page.

| Step | Action |
|------|---|
| 1. | Navigate to the Employee Event Detail page using the following path: |
| | NavBar > Menu > Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail |
| | |

The **Employee Event Detail Find an Existing Value** page displays.

| | Employee Event Detail |
|---|--|
| Employee Event Detail | |
| 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 Choose from recent searches | Choose from saved searches |
| Schedule ID begins with | Q |
| Empl ID begins with v | Q |
| Benefit Record Number = - | |
| Event Identification = - | |
| Benefit Program begins with 🖌 | ٩ |
| Show fewer options Search Clear | |
| | |
| For more information pertaining to "Overview of the Cardinal HCM Se Website in Job Aids under Learn | the Cardinal HCM Search pages, refer to the Job Aid titled arch Pages". This Job Aid is located on the Cardinal ng . |
| | 5 |
| If you are searching for a specific s applicable Schedule ID. To see al Schedule ID field blank and popul Employee ID. | Schedule ID, use the Schedule ID field to define the I Benefit Events for a specific employee, leave the ate the Empl ID field with the applicable employee's |
| If you are searching for a specific s applicable Schedule ID. To see al Schedule ID field blank and popul Employee ID. Unless you are looking for Open E "EM00". | Schedule ID, use the Schedule ID field to define the I Benefit Events for a specific employee, leave the ate the Empl ID field with the applicable employee's nrollment Benefit Events, the Schedule ID is typically |
| If you are searching for a specific applicable Schedule ID. To see al Schedule ID field blank and popul Employee ID. Unless you are looking for Open E "EM00". This Job Aid demonstrates search applicable employee. | Schedule ID, use the Schedule ID field to define the I Benefit Events for a specific employee, leave the ate the Empl ID field with the applicable employee's nrollment Benefit Events, the Schedule ID is typically ing for a specific Schedule ID first and then defining the |
| If you are searching for a specific applicable Schedule ID. To see al Schedule ID field blank and popul Employee ID. Unless you are looking for Open E "EM00". This Job Aid demonstrates search applicable employee. | Schedule ID, use the Schedule ID field to define the I Benefit Events for a specific employee, leave the ate the Empl ID field with the applicable employee's nrollment Benefit Events, the Schedule ID is typically ing for a specific Schedule ID first and then defining the edule ID in the Schedule ID field. |



Benefits Job Aid

BN361_Researching Benefit Events

| Step | Action |
|----------|--|
| 3. | Enter or select the employee's Employee ID in the Empl ID field. |
| | Schedule ID begins with V EM00 Q |
| | Empl ID begins with 🗸 |
| 4. | Click the Search button. |
| | Clear |
| The Empl | ovee Event Detail page for the employee displays with the Participant tab displayed by |

The **Employee Event Detail** page for the employee displays with the Participant tab displayed by default.

| Sched | ID EM00 | Event Maintenanc | e | | | Benefit Be | cord 0 | |
|-----------------------------|---|--|--|---|--|--|--|--|
| Event Informa | tion | | utter | | | Eligibility Information | | |
| Statu Clas | D 3 s Closed to Pro s MARMarriage e Manual Event | cessing | | Empl Record Date Effseq Priority | 0 08/01/2024 0 420 | Englishty mennded Empl Recor COBRA Actio Addr Effc Job Effc | d 0 n ti 07/10/2024 ti 07/10/2024 | |
| | Multi-Activ | vity Indicator | | . nong | 120 | Effse | q 0 | |
| Pr I Igibility Source | Status Date occess Indicator Election Source Excess Credit Option Notify Confirm Notify uppress Forms | 09/25/2024 Normal Process Online Forfeit Excess (Print Confirmati | ing Credits Elec Cor on Forms Only | ction Rcvd nfirm Rcvd | Job Eligit Event Out Event Discussion Available Finalize/A Enrl/Print | ility Changed of Sequence connected through Self Service pply Defaults Days 0 | | |
| Empl Record | Effdt | Effseq | Primary Job | Include Job for Eligibility | r Include Job for Deductions | Eligibility Source | | |
| | 07/10/2024 | | | | | ADDRESSES | | |
| 0 | 07/10/2024 | 0 | | 12 | 5 | JOB | | |
| Return to Sear | ch Previous | in List Nex | t in List N | otify | , | | | |



| Step | Action |
|------|--|
| i | Event Information section: Event Information ID 3 Empl Record 0 Status Closed to Processing Class MARMarriage Effseq 0 Source Manual Event Priority 420 Multi-Activity Indicator |
| | The Status field identifies the current status of the Benefit Event. See the Event Statuses Overview section of this Job Aid for a list of the Event Statuses and a description for each one The Event Source field identifies how the Benefit Event was triggered ("Job Data Change", "Address Change", "Manual Event", etc.) The Date field identifies the applicable Benefit Event date |
| i | Eligibility Information section: Eligibility Information Empl Record COBRA Action Addr Effdt 07/10/2024 Job EffDt 07/10/2024 Effseq The Empl Record field identifies the employee's Employee Record that was utilized by the Benefits Administration process to determine eligibility The COBRA Action field will display the applicable Action Code ("DIV", "TER", etc.) if the Benefit Event may make the employee eligible for COBRA coverage The Addr Effdt field displays the effective date for the employee's address information (State and/or Postal Zip Code) that was utilized by the Benefits Administration process to determine eligibility The Job Effdt field displays the effective date of the employee's Job Data that was utilized by the Benefits Administration process to determine eligibility The Job Effdt field displays the effective sequence number of the Job Data row that was utilized by the Benefits Administration process to determine eligibility |



Benefits Job Aid

| Processing Information section: Processing Information Benefit Program SAL Salaried Employee Benefit Pgm Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Use on 25/2024 Process Indicator Normal Processing Election Source Online Excess Credits Option Notify Election Rovd Online Excess Credits Forfeit Excess Credits Option Notify Confirm Rovd Suppress Forms Print Confirmation Forms Only EnriPrint Days 0 The Process Status field identifies the current processing status for the Benefit Event. During the Benefit Event and can result in various Process Statuses. See the Process Statuses Overview section of this Job Aid for a list of the Process Status The Status Date field identifies the date on which the Benefit Event moved to the current Process Indicator field identifies the last action executed by the Benefits the Current Process Status | Action | | |
|---|--|--|--|
| Processing Information Benefit Program SAL Salaried Employee Benefit Pgm Address Eligibility Changed Process Status Finalized - Enrolled Status Date 09/25/2024 Process Indicator Normal Processing Election Source Online Event Out of Sequence Event Disconnected Available through Self Service Option Notify Confirm Notify Confirm Notify Confirm Notify Confirm Notify Confirm Notify Enr/Print Days 0 The Process Status field identifies the current processing status for the Benefit Event. During the Benefit Event and can result in various Process Statuses. See the Process Statuses Overview section of this Job Aid for a list of the Process Statuses and a description for each along with some potential reasons for the Process Status The Status Date field identifies the date on which the Benefit Event moved to the current Process Indicator field identifies the last action executed by the Benefits | Processing Information section: | | |
| Administration process for the Benefit Event. Typically, this will reflect "Normal Processing". See the <u>Process Indicators Overview</u> section of this Job Aid for a list of the Process Indicators and a description for each one The Election Source defines how the benefit elections were made for the Benefit Event. "Online" indicates that a BN Administrator made the elections on behalf of the employee and "Web" indicates that the employee made the elections through | Action Processing Information section: Processing Information Benefit Program SAL Salaried Employee Benefit Pgm Process Status Process Status Status Date 0925/2024 Process Indicator Normal Processing Election Source Election Source Option Houtity Election Source Suppress Forms Print Confirm Notify Suppress Forms Print Confirmation Forms Only Envent. During the Benefits Administration process, there are a | ⇒ ⊃f ne | |
| | | Action Processing Information section: Processing Information Benefit Program SAL Salaried Employee Benefit Pgm Process Status FindExed - Enrolled Status Date OPCOSS Status Election Source Online Excess Credit Process Status FindExed - Enrolled Suppress Forms Print Confirm Notify Confirm Revd Suppress Forms Print Confirmation Forms Only EnrolProcess Status Find Lexen in evaluating a Benefit Event and can result in various Process Statuses. See the Process Statuses Overview section of this Job Aid for a list of the Process Statuses Statuses and a description for each along with some potential reasons for the Process Status The Status Date field identifies the last action executed by the Benefits Administration process for the Benefit Event. Typically, this will reflect "Normal Process Indicators and a description for each one The Process Indicators | |



Benefits Job Aid

BN361_Researching Benefit Events

| Step | Action | |
|------|--|--------------------|
| i | Processing Information Benefit Program SAL Salaried Employee Benefit Pgm Process Status Finalized - Enrolled Status Date 09/25/2024 Process Indicator Normal Processing Election Source Online Excess Credit Forfeit Excess Credits Option Notify Election Rcvd Confirm Notify Confirm Rcvd Suppress Forms Print Confirmation Forms Only Enrl/Print Days 0 | nay ed nefit |
| 6. | Click the Plan Type tab at the top of the page. | |



| Step | Action | | |
|-----------------|---|--|---|
| The Plan | Type tab displays. | | |
| < | Cardinal Homepage | | Employee Event Detail |
| | Sched ID EM00 | Empl ID 00863006400 Ben Record 0 Event ID 3 | |
| F | Plan Types | Q [4] 4 2 of 15 V [F] View All | |
| | Plan Seq 10 Option Code 28 Curr Election No Enroll Action Enroll Ignore Plan No | Plan Type 10 Medical Benefit Plan ACC0 Coverage Code 4 Elections Allowed Coverage Begin 08/01/2024 BAS Error Deduction Begin 07/25/2024 Proof Received Coverage Elect 09/25/2024 | |
| | Coverage Elect Elect Dependents Crown License 1 | Addi Pay Eff | |
| | Group Header 1 | Flat Amount | |
| | Group Header 2 | | |
| | Savings Coverage Flat Amt Deduct Amount % of Gross | Savings Coverage After-Tax Flat Amt Ann Excess Credits Deduct Amount ATax % of Gross ATax | |
| | Group Header 10 | Investments | |
| | Plan Type BTax Benefit Plan BTax Ded Code BTax Ded Class BTax | Plan Type ATax Benefit Plan ATax Deduction Code ATax Deduction Class ATax | |
| | Group Hondor 2 | | |
| | Employee Contribution | Ann Excess Credits FSA Annual Pledge | |
| | Group Header 4 Pension Base | Voluntary Amount Voluntary Percent | |
| | Group Header 5 Vacation Hours Goal Amount | Vacation Buy Amount Vacation Sell Amount | |
| | Group Header 6 | | |
| | Effdt | Effect On Billing N None % of 0 Employee Rate Plus \$0.00 | |
| Par | Return to Search Previous in List | Next in List Notify | |
| 7. | The Plan Type ta employee. Use th and review the ke guidelines. | Ib is used to review information related to the app ne navigation arrows provided to toggle between by information within the Plan Types section base | licable Plan Types for the the different Plan Types ed on the following |



Benefits Job Aid

| Step | Action | | |
|------|---|--|--|
| | Plan Types section: | | |
| | Plan Types Q I I 2 of 15 I View All | | |
| | Plan Seq 10 Option Code 28 Curr Election No Enroll Action Enroll Ignore Plan No Coverage Elect Elect The Plan Type field identifies the Plan Type The Plan Type field identifies whether the employee kept their current election for this Plan Type when the Benefits enrollments were completed for this Benefit Event. "Xes" indicates that the enrollment for this Plan Type was not changed and "No" | | |
| i | The Enroll Action field identifies what action was taken for this Plan Type was changed and No Benefit Event The Enroll Action field identifies what action was taken for this Plan Type while processing this Benefit Event. "Enroll" indicates that there was an election made. "None" indicates that no election was made. "Terminate" indicates that the prior election was terminated | | |
| | The Coverage Elect field identifies whether the employee made an election, waived, or terminated the election for this Plan Type while processing this Benefit Event The Benefit Plan field identifies the Benefit Plan that the employee enrolled in for this Plan Type while processing this Benefit Event (when applicable) The Coverage Code field identifies the severage code that the employee anrolled in | | |
| | • The Coverage Code field identifies the coverage code that the employee enrolled in for this Plan Type while processing this Benefit Event (when applicable) | | |
| | The Coverage Begin field identifies the coverage begin date of the election for this Plan Type (when applicable) | | |
| | The Deduction Begin field identifies the payroll deduction begin date of the election for this Plan Type (when applicable) | | |
| | The Coverage Elect field identifies the date that the Benefit Event was finalized. This date matches the election date on the Base Benefit pages. | | |
| | The employee's dependents covered for this Plan Type can be reviewed by clicking the Dependents link | | |
| 8. | Click the Option and Cost tab at the top of the page. | | |
| | Participant Plan Type Option and Cost | | |



| Step | Action | | | | |
|--|---|---|--|--|--|
| The Option and Cost tab displays. | | | | | |
| | Cardinal Homepage | Employee Event Detail | | | |
| | Participant Plan Type Option and Cost | | | | |
| | Sched ID EM00 Empl ID 00863006400 Ben Record 0 Event ID 3 | | | | |
| | lan Types Q [4 4 3 of 15 •] | I View All | | | |
| | Plan Seq 23 Plan Type Imputed Life | | | | |
| | Options Q I I d 1 of 1 v > > I I | View All | | | |
| | Option Seq 1 Option ID 59 Option Type Option Benefit Plan IMPLIF Coverage Code Implies Default Election Option Code 1 Option Level 1 Implies Coverage Base 102000.00 Premium Base 102000.00 Proof Required Dedn Class Taxable Implies Implies Implies | | | | |
| | First Second Third Fourth Fifth | | | | |
| | Option Cost | | | | |
| | Cost ID Cost Type Annual After Tax Annual Before Tax Annual ER After Tax Deduction Before Tax Deduction Before Tax | eduction | | | |
| | 57 Price | | | | |
| Pe | Return to Search Previous in List Next in List ticipant Plan Type Option and Cost | | | | |
| 9. | The Option and Cost tab is used to review the cost information related Plan Types for the employee. Use the navigation arrows provided to different Plan Types and review the key cost information. | ted to the applicable toggle between the | | | |



Process Statuses Overview

During the Benefits Administration process, there are a series of actions taken in evaluating Benefit Events and there are varying results from these actions. The Process Status table below describes each Process Status and possible reasons for the event resulting in that Process Status:

| Process Status | Reason/Description | |
|--------------------------------------|--|--|
| Assign Error (AE) | The Benefits Administration process was unable to assign the applicable Benefit Program due to missing or incorrect information. | |
| Assign None (AN) | The Benefits Administration process was unable to assign a Benefit Program. This could be a result of the Benefit Flag set to a terminated Employee Record (Empl_Rcd). | |
| Assigned (AS) | The Benefits Administration process assigned the applicable Benefit Program. | |
| Elections Entered (ET) | Entered A Benefits Administrator (or the employee through Employee Self-Service (ESS)) has entered the employee's new elections into the system and they are ready for validation by the Benefits Administration process. | |
| Elections Error (EE) | The system encountered an error in processing the elections for the employee associated with the Benefit Event. This could be a result of the dependent effective dates or a mismatch between the selected coverage code and listed dependents. | |
| Finalized – Benefit Pgm None (FA) | Indicates that the Benefit Event has no program assignment and no current elections. This could be a result of the Benefit Flag being set to a terminated Empl_Rcd. It could also be the result of an address change when the employee is not active. | |
| Finalized – Enrolled (FE) | nalized – rolled (FE)The Benefits Administration process is complete for the Benefit Event. elections have been validated and loaded. | |
| Finalized – Prepare None (FP) | The Benefits Administration process is complete and indicates that the employee's eligibility has not changed. | |
| Notified (NT) | Employee has accessed or initiated the Benefit Event through Employee Self-Service (ESS) but has not submitted their elections. | |
| Prepare Error (PE) | Indicates that there is an error in the preparation of options. The system has encountered an error. This could be a result of a missing ICI ABBR or a missing Payroll Calendar. | |



| Process Status | Reason/Description | |
|----------------|---|--|
| Prepared (PR) | The system has calculated eligible options, credits, rates, and proof requirements for the employee associated with the Benefit Event. The current elections have been identified for proof, eligibility level, and default processing. | |
| Re-Enter (RE) | Indicates that a Benefits Administrator has re-opened the Benefit Event. | |



Process Indicators Overview

The Process Indicator table below describes each Process Indicator:

| Symbol | Name | Description | |
|--------|------------------------------|---|--|
| A | Assign Benefit Program | Event Status must be "Open". It takes the Benefit Event all the way back to defining program eligibility and any data entry done in this Benefit Event is lost. The system attempts to re-process participants to PR status. | |
| E | Elect Options | Event Status must be "Open". Schedule assignment, program assignment, and option eligibility are not reviewed or changed. The system rolls back elections from the Base Benefit enrollment tables but retains them on a table. The process re-validates elections for this Benefit Event and loads them, if no errors occur, back into the Base Benefit enrollment tables, resetting the final process status to FE. | |
| Ν | Normal Processing | Standard processing for the Benefits Administration process. | |
| Р | Prepare Options | Event Status must be "Open". Re-evaluates Option eligibility and any data entry done in this Benefit Event is lost. The system attempts to reprocess participants to PR status. | |
| R | Re-Enter | hter Re-opens the data entry page. If you need to change an election this is where it should be done. The system leaves the Benefit Event at a process status of RE. When you post election changes to the data entry component, the system updates the process status to ET. | |
| v | Void | Void Used when a Benefit Event needs to be voided. Do not set the Event Status to "VOID". The system will do that when the Benefit Event is reprocessed. If the Benefit Event is in a process status of FE-Enrolled, elections are rolled back from the Base Benefit enrollment tables but retains them on a table. The system leaves the Benefit Event at a process status of RE. | |



Event Statuses Overview

The Event Status table below describes each Event Status:

| Event Status | Description | |
|---|---|--|
| | Open Benefit Events are those Benefit Events that are currently being processed. | |
| Open (O) "Open for Processing"Only one Benefit Event for a participant can be open at a time. If more one Benefit Event is open, one Benefit Event must be closed in order process the other Benefit Event. | | |
| | Open Benefit Events can be updated to "Closed" either by the system or manually. | |
| Closed (C) "Closed to Processing" Closed Benefit Events are those Benefit Events that are not currently being processed by the system. Benefit Events could be closed because they waiting for another Benefit Event to be processed prior to opening, or the could be closed because they have already been enrolled. Closed Benefit Events can be updated to "Open" either by the system or | | |
| manually. | | |
| Void (V) | Voided Benefit Events are those Benefit Events that have been manually voided because the Benefit Event is no longer needed and all eligibility processing related to it has been reversed. In effect, it is as if the Benefit Event never occurred. This should never be used without prior consultation with DHRM. Voided Benefit Events can be updated to "Open" or "Closed" through Benefit Event re-processing | |



Flagged Benefit Events Overview

The Benefits Administration process identifies changes in Job and Personal data which can impact the employee's eligibility for a Benefit Event created prior to that change. These Benefit Events then become "Flagged Benefit Events" with the associated flags systematically flagged to indicate that benefits eligibility must be re-evaluated. The most common flags seen are **Address Eligibility Changed**, **Job Eligibility Changed**, and **Event Out of Sequence**. A Benefit Event can also be flagged as **Event Disconnected**.

If a flagged Benefit Event has not yet reached the "Prepared" status and one or more of the eligibility flags are set, then the Benefit Event will get set back to "Assign Program" before any further processing on this Benefit Event occurs. If the Benefit Event is already in the "Prepared" status, the options and elections already entered will be re-evaluated upon the next execution of the Benefits Administration process.

| BenAdmin Event Status Update | | | × |
|--|---|---|---|
| Update Event Status | | | - |
| Empl ID | | Ben Record 0 | |
| Event Status Update ⑦ | | Q, 4 4 1 of 6 v | |
| Schedule ID Event Date Event ID Event Class Event Priority Benefit Program Process Status Action Source | EM00 05/10/2024 Event Disconnected 4 HR2 Immediate Enrollment 99 SAL Finalized - Enrolled Manual Event | Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults Print Option Suppress Print of Both Forms Process Normal Processing Closed to Processing | |
| Schedule ID Event Date Event ID Event Class Event Priority Benefit Program | EM00 05/10/2024 Event Disconnected 5 HIR Initial Enrollment 100 SAL | Address Eligibility Changed MultiJob Indicator Changed ØJob Eligibility Changed Event Out of Sequence Finalize/Apply Defaults Print Option Print Both Forms | |
| Process Status Action Source | Finalized - Enrolled Job Data Change | *Event Status Closed to Processing | |
| Schedule ID Event Date Event ID Event Class Event Priority | EM00 05/10/2024 Event Disconnected 6 ELG Elig Config Change 130 | □ Address Eligibility Changed □ MultiJob Indicator Changed □ Job Eligibility Changed □ Event Out of Sequence □ Finalize/Apply Defaults | - |
| Benefit Program Process Status | SPT Prepared | Print Option Print Both Forms *Process Normal Processing | |
| Action Source | Job Data Change | *Event Status Open for Processing 🗸 | • |

Example of a flagged Benefit Event on the Event Status Update page:



Scenario: There was a change on the employee's job data record with an effective date of "5/10/2024" (the ELG Benefit Event) which changed the employee's Benefit Program and impacted the eligibility of the employee's HR2 and HIR Benefit Events with the same date of "5/10/2024". Therefore, the **Job Eligibility Change** flag is checked for both the HR2 and HIR Benefit Events. The following guidelines apply:

- The flag checkboxes display on the Benefit Events that must be re-evaluated (HR2 and HIR Benefit Events) but not the Benefit Event that caused the change (ELG Benefit Event)
- The Benefits Administration process will automatically re-process the flagged Benefit Events. Once re-processed, the **Job Eligibility Changed** flag will reset to unchecked for both the HR2 and HIR Benefit Events

The following are the most common types of flags seen by Agency Benefits Administrators:

- The Address Eligibility Changed flag will become checked when an update is made to the employee's address in Personal information and eligibility must be reviewed to determine if the employee is eligible for a Kaiser or COVA Care plan
- The **Job Eligibility Changed** flag indicates that Job information initially used in determining the employee's benefits eligibility has been changed. The **Job Eligibility Changed** checkbox will become checked when the Job row from which the Benefit Event is based on has been corrected or when a new row is inserted into the Job record with an Effective Date prior to an existing Event Date
- The Event Out of Sequence flag indicates that a Benefit Event has been processed out of order according to its effective date or priority. It will become checked when another Benefit Event is created with an Event Date prior to the Effective Date of the Benefit Event that already exists (regardless of the process status). These may be retroactive, current, or future rows that have an Event Date that precedes that of an existing Benefit Event. This is often seen after Open Enrollment (OE). For example, a Birth Benefit Event was entered effective on "6/15" after the employee had completed enrollment for OE that is effective "7/1". The Event Out of Sequence flag would be checked on the OE Benefit Event because a review is required to determine if the baby is to be added to the OE enrollment
- The **Event Disconnected** flag is checked if a Job Row is deleted. The associated Benefit Event becomes disconnected from the Job. If a Benefit Event is disconnected before it is finalized, the Benefit Administration process will automatically close the Benefit Event and it cannot be processed any further



Troubleshooting Errors Overview

This section of the Job Aid provides information pertaining to some of the common Error Messages that may be encountered while processing Benefit Events. A screenshot of each Error Message is provided along with a description of the information presented and possible corrective actions.

Error Message: Incorrect number of dependents enrolled for Covered Person Type: Child, Plan Type 10. The number of dependents must be consistent with the Coverage Code Control for this Covered Person Type as defined in the Event Rules.

This is an example of the Error Message that displays when an action to add or remove a dependent is not permitted by plan rules. For example, the child enrolled under an Employee + Child coverage is removed from coverage, but the coverage code level is unchanged.

| Incorrect number of dependents enrolled for Cove | ered Person Type: Child, Plan Type 10 (4000,156) |
|---|---|
| The number of dependents must be consistent wi defined in the Event Rules. | ith the Coverage Code Control for this Covered Person Type as |
| | ок |

Error Message: Dependent XX exceeds the maximum age for a non-student (Plan Type 10). The individual shown has attained the maximum age for which they may be covered under this plan while in a Non-Student status. Please remove this dependent from coverage, or change the Benefit Program rules, regarding non-student status.

This is an example of the Error Message that displays when an over-age dependent is covered. State policy allows the dependent age 26 to remain covered until the end of the year that he/she turns 26. For example, while processing a mid-year life event such as a divorce, if there is a dependent age 26 covered, this message will appear when trying to finalize the Benefit Event. After finalizing the Benefit Event, the Benefits Administrator may need to double check the Base Benefits to ensure that the overage dependent is still listed as enrolled.

| Dependent 03 exceeds the maximum age for a non-student (Plan Type 10). (4000,100) |
|--|
| The individual shown has attained the maximum age for which they may be covered under this plan while in a Non-Student |
| status. Please remove this dependent from coverage, or change the Benefit Program rules regarding non-student status. |
| ОК |



Error Message: A person of type Child cannot be enrolled under the selected Coverage Code (Plan Type 10). You have chosen a coverage code for which this type of coverage is not allowed. Please delete the elected dependent row for persons of this type or update the coverage code (option code) to a value which allows coverage for this type of persons.

This Error Message displays when an action to add a dependent is not permitted by plan rules. For example, the Employee Only coverage code is selected, yet a child is listed as a dependent. In this case, the dependent cannot be enrolled in coverage or the coverage code elected must be updated

| A person of type Child cannot be enrolled under the selected Coverage Code (Plan Type 10). (4000,154) | | | | | |
|---|--|--|--|--|--|
| You have chosen a coverage code for which this type of coverage is not allowed. Please delete the elected dependent row for persons of this type or update the coverage code (option code) to a value which allows coverage for this type of persons. | | | | | |
| οκ | | | | | |

Error Message: Job Data for this employee has changed since the event was created. No further action is necessary.

This is a Warning Message that typically displays when a change was made to an employee's Job record between when the Benefit Event was initially created and the time it is processed through the Benefits Administration process. No further action is necessary on the part of the BA.

| Messages | | | Q | | 1 of 1 🗸 | $ \cdot = \cdot $ | I View All |
|-----------------------------|--|---------------------------------------|-----------------------------------|---------------------------|-----------------------------------|---------------------------|------------|
| Schedule ID Empl ID | EM00 | | | | | | |
| Benefit Record Option ID | 0 | Event ID Cost ID | 2 | | | | |
| Description | Job Data for this emplo necessary. (MSGData | wee has changed 1: Job Elig Chg, N | since the event ISGData2: Prim | was create ary Job Chi | d. No further a), MSGData3: / | action is Addr Elig Cł | ng) |
| Message Data | Y N N | | | | | | |



Voiding Benefit Events Overview

At times, a Benefit Event is no longer needed and should be voided. Typically, Benefit Events are voided if the employee submitted the wrong Event Date, the Benefits Administrator keyed the wrong Event Date, or the Benefit Event is disconnected. To have a Benefit Event voided, contact the Office of Health Benefits (OHB).

Scenario: An employee wanted to change plans once they added a new dependent. The DLE Benefit Event shown below only allows additional dependents to be added to an existing plan. OHB determined that this circumstance was eligible for a plan change and indicated that a HIP Benefit Event could be created. The DLE Benefit Event was voided. The Agency's Benefits Administrator used the **Benefit Event Entry** page to create an HIP Benefit Event and used this Benefit Event to change plans while adding a new dependent.

| BenAdmin Event Status Update | | | | | |
|--|---|---|--------|--|--|
| | | | Help 🔺 | | |
| Update Event Status | | | | | |
| Empl ID | | Ben Record 0 | | | |
| Event Status Update ③ | | Q 4 4 1 of 8 🗸 🕨 🕨 | | | |
| Schedule ID Event Date Event ID Event Class Event Priority Benefit Program Process Status Action Source | EM00 05/01/2024 5 HIP HIPAA Spec Enroll/Loss Covrg 460 SAL Finalized - Enrolled Manual Event | Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults Print Option Print Confirmation Forms Only *Process Normal Processing *Event Status Closed to Processing | | | |
| Schedule ID Event Date Event ID Event Class Event Priority Benefit Program Process Status Action Source | EM00 05/01/2024 Event Disconnected 4 DLE EE/Dep LostElig w Other Empir 445 SAL Prepared Manual Event | Address Eligibility Changed MultiJob Indicator Changed Job Eligibility Changed Event Out of Sequence Finalize/Apply Defaults Print Option Print Confirmation Forms Only *Process Normal Processing *Event Status Void Void V | | | |



Scenario: An employee has two MAR Benefit Events listed on the **Event Status Update** page; one dated "5/4/2024" and the other dated "5/10/2024". In this scenario, the employee entered a MAR event in Employee Self-Service (ESS) while the Benefits Administrator created a MAR Benefit Event as well. One of the dates is incorrect. The MAR Benefit Event with the incorrect date needs to be voided, and the other Benefit Event should be processed. Additionally, if an employee changes their Marital Status from "Unknown" to "Married" or "Divorced" in Personal Details in ESS, a Benefit Event is automatically generated, even if no benefit changes were made. In that case, the Benefit Event created in error should be voided as well.

| BenAdmin Event Status Update | | | | | |
|---------------------------------|-------------------------|--|------|--|--|
| | | | Help | | |
| Update Event Status | | | | | |
| Empl ID | | Ben Record 0 | | | |
| - | | | | | |
| Event Status Update () | | | | | |
| Sobodulo ID | 247001 | Address Eligibility Changed | | | |
| Event Date | Event Disconnected | MultiJob Indicator Changed | | | |
| Event ID | 0 | □Job Eligibility Changed | | | |
| Event Class | OE Open Enrollment | Event Out of Sequence | | | |
| Event Priority | 800 | Finalize/Apply Defaults | | | |
| Benefit Program | HBS | Print Option Print Confirmation Forms Only | | | |
| Process Status | Finalized - Enrolled | *Process Normal Processing 💙 | | | |
| Action Source | Open Enrollment | *Event Status Closed to Processing | | | |
| | | | | | |
| Schedule ID | EM00 | Address Eligibility Changed | | | |
| Event Date | 05/10/2024 | Indicator Changed | | | |
| Event ID | 5 | | | | |
| Event Class | MAR Marriage | Event Out of Sequence | | | |
| Event Priority | 420 | Drinalize/Apply Defaults | | | |
| Benefit Program | SAL | | | | |
| Process Status | Prepared | *Process Normal Processing | | | |
| Action Source | Manual Event | *Event Status Open for Processing | | | |
| | | Address Elioibility Changed | | | |
| Schedule ID | EM00 Event Disconnected | MultiJob Indicator Changed | | | |
| Event Date | 05/04/2024 | □ Job Eligibility Changed | | | |
| Event ID | 4 | Event Out of Sequence | | | |
| Event Class | MAK Marnage | Finalize/Apply Defaults | | | |
| Event Phonty Benefit Program | 420 | Print Option Print Both Forms 🗸 | | | |
| Process Status | SAL Prepared | *Process Normal Processing V | | | |
| Action Source | Manual Event | *Event Status Closed to Processing | | | |