

Managing BA Contacts Overview

This Job Aid provides the steps utilized by Agency Benefits Administrators to manage the BA Contacts for their Business Unit/Group ID(s). It is critically important that the BA Contacts are maintained accurate within Cardinal. When employees make changes via Employee Self-Service (ESS), a notification is sent to the Benefits Administrator Contact Type.

Note: Cardinal recommends using a shared email address or distribution list to allow for notifications to be sent to a broader group of individuals.

This Job Aid contains sections that provide the step-by-step instructions used to complete the following:

- Add a new BA Contact
- Edit an existing BA Contact
- Delete an existing BA Contact

This Job Aid does not apply to agencies participating in The Local Choice Health Benefits Program (TLC). Localities enrolled in TLC should refer to the Job Aid titled **BN361_TLC Data Sheet Locality**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

Navigation Note: Please note that you may see 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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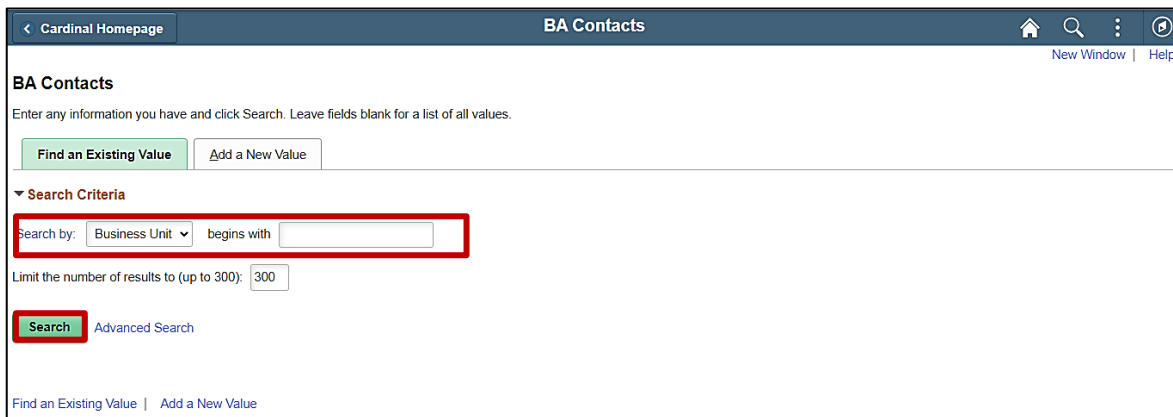
Adding a New BA Contact

This section of the Job Aid should be used when you need to add a new BA Contact for your Business Unit/Group ID. There are six types of contacts that can be defined. Please note that each Contact Type is limited to one person.

1. To add a new BA contact, navigate to the **BA Contacts** page using the following path:

Menu > Benefits > Employer Information > BA Contacts

The **BA Contacts Search** page displays.



BA Contacts

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

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Search by: Business Unit begins with

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

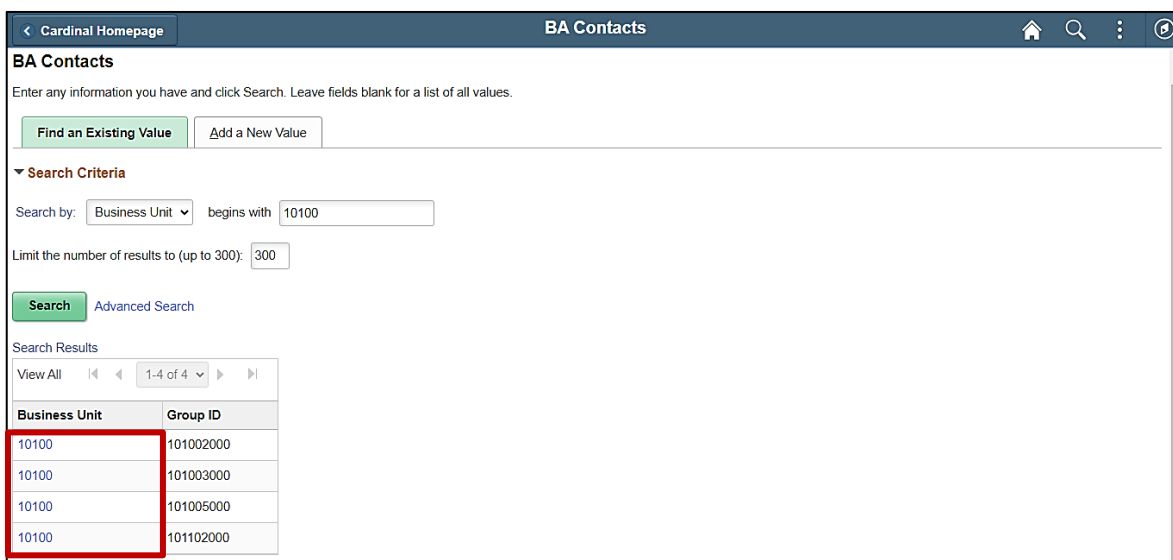
[Search](#) [Advanced Search](#)

[Find an Existing Value](#) | [Add a New Value](#)

2. Enter the applicable Business Unit in the **Business Unit** field.

3. Click the **Search** button.

The page refreshes and the search results display.



BA Contacts

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

[Find an Existing Value](#) [Add a New Value](#)

▼ Search Criteria

Search by: Business Unit begins with

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

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

Search Results

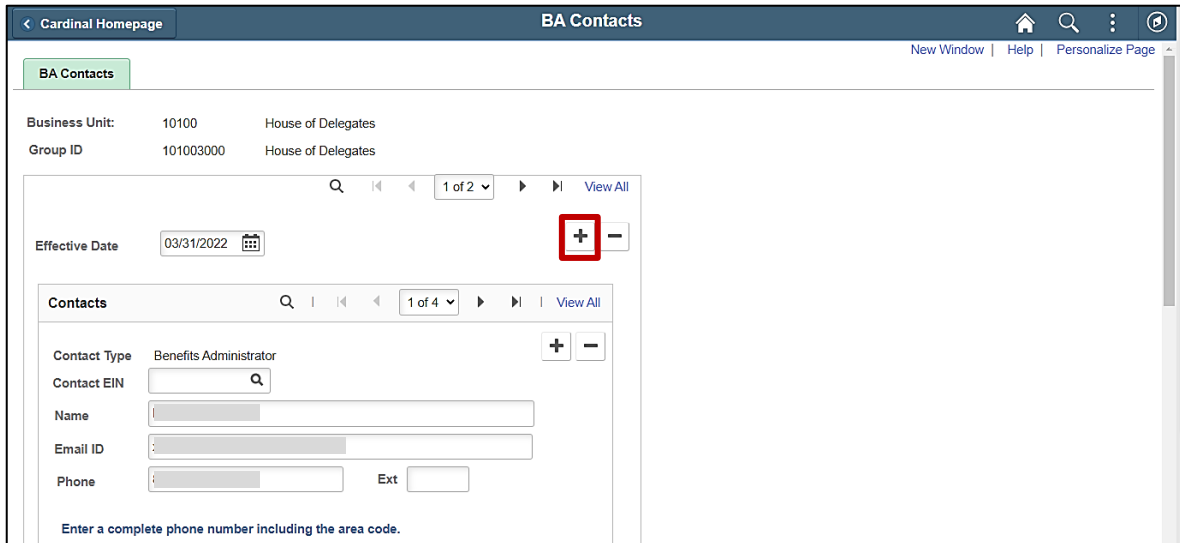
View All

Business Unit	Group ID
10100	101002000
10100	101003000
10100	101005000
10100	101102000

4. Click the **Business Unit** link for the corresponding Group ID.

Note: Each Group ID must be updated individually.

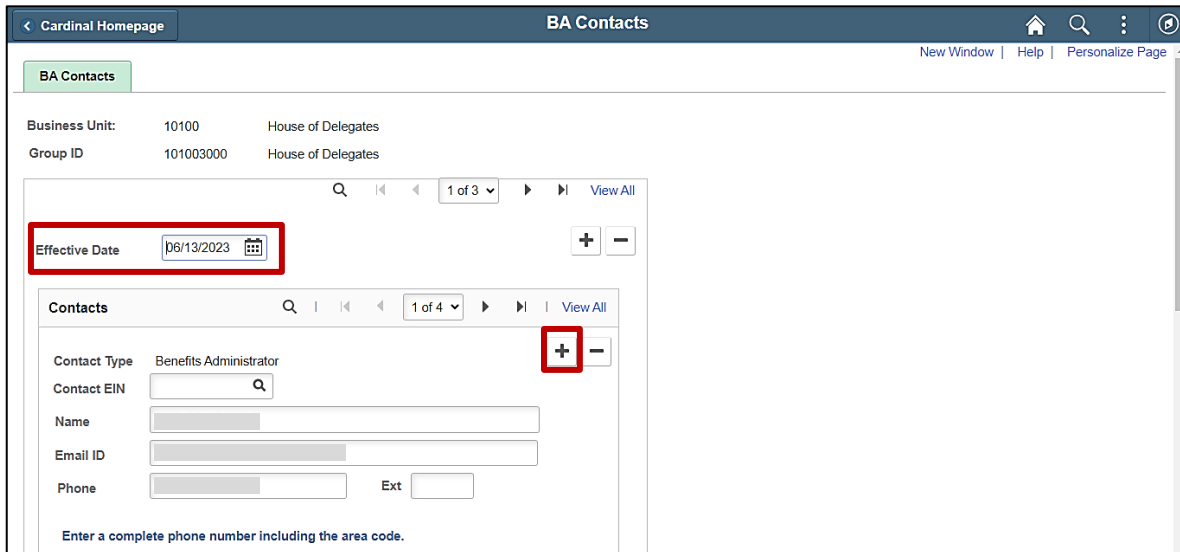
The **BA Contacts** page displays for the applicable Group ID.



The screenshot shows the 'BA Contacts' page in a web browser. The page header includes 'Cardinal Homepage' and 'BA Contacts'. Below the header, there are fields for 'Business Unit' (10100) and 'House of Delegates', and 'Group ID' (101003000) and 'House of Delegates'. A search bar and navigation controls are visible. The 'Effective Date' field is set to '03/31/2022' and has a calendar icon and a red box around the '+' icon. Below this is the 'Contacts' section with a search bar and navigation controls. The 'Contact Type' is set to 'Benefits Administrator' and has a red box around the '+' icon. There are input fields for 'Contact EIN', 'Name', 'Email ID', 'Phone', and 'Ext'. A note at the bottom says 'Enter a complete phone number including the area code.'

5. Click the **Add a New Row (+)** icon to add a new effective dated row.

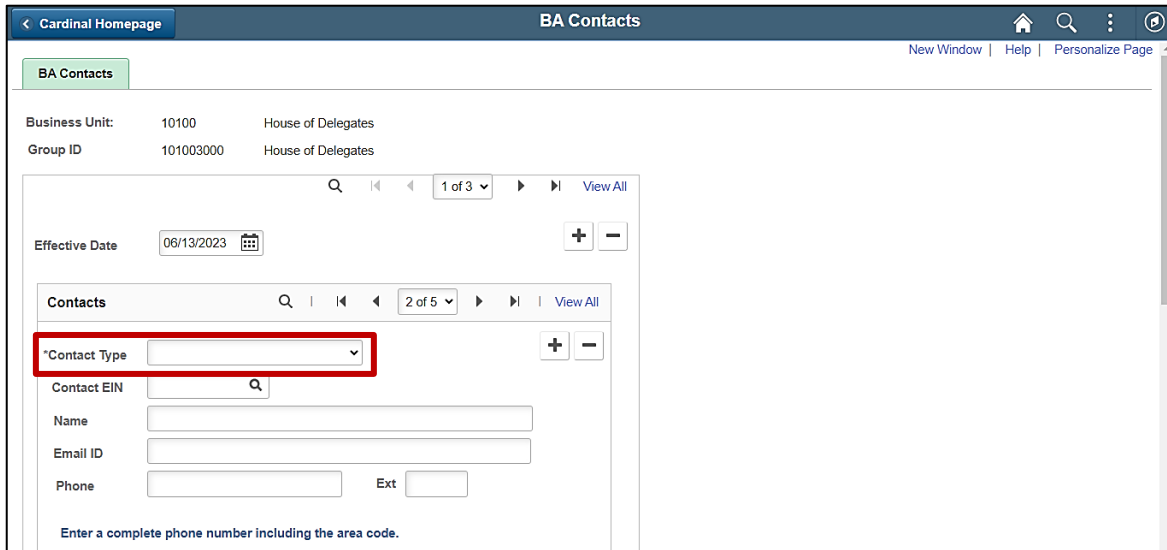
The page refreshes with a new effective dated row.



The screenshot shows the 'BA Contacts' page after a refresh. The 'Effective Date' field is now '06/13/2023' and is highlighted with a red box. The 'Contacts' section now has a red box around the '+' icon. The rest of the page content is the same as the previous screenshot.

6. The **Effective Date** defaults to the current system date. Update as needed using the **Effective Date Calendar** icon.
7. Next, add a Contact Type for the new BA Contact. Click the **Add a New Row (+)** icon within the **Contacts** section.

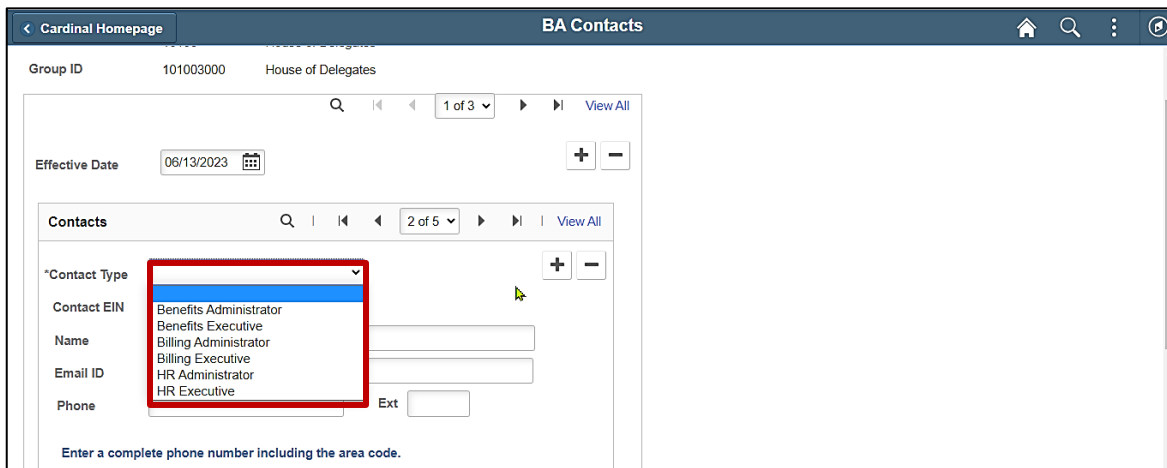
The page refreshes with the new row.



The screenshot shows the 'BA Contacts' form in the Cardinal system. The form is titled 'BA Contacts' and includes fields for 'Business Unit' (10100 House of Delegates) and 'Group ID' (101003000 House of Delegates). Below these fields is a search bar and a 'View All' link. The 'Effective Date' is set to 06/13/2023. The 'Contacts' section is active, showing a list of 2 of 5 contacts. The 'Contact Type' dropdown menu is highlighted with a red box, indicating it is the focus of the next step.

8. Click the **Contact Type** dropdown button.

The **Contact Type** menu displays.

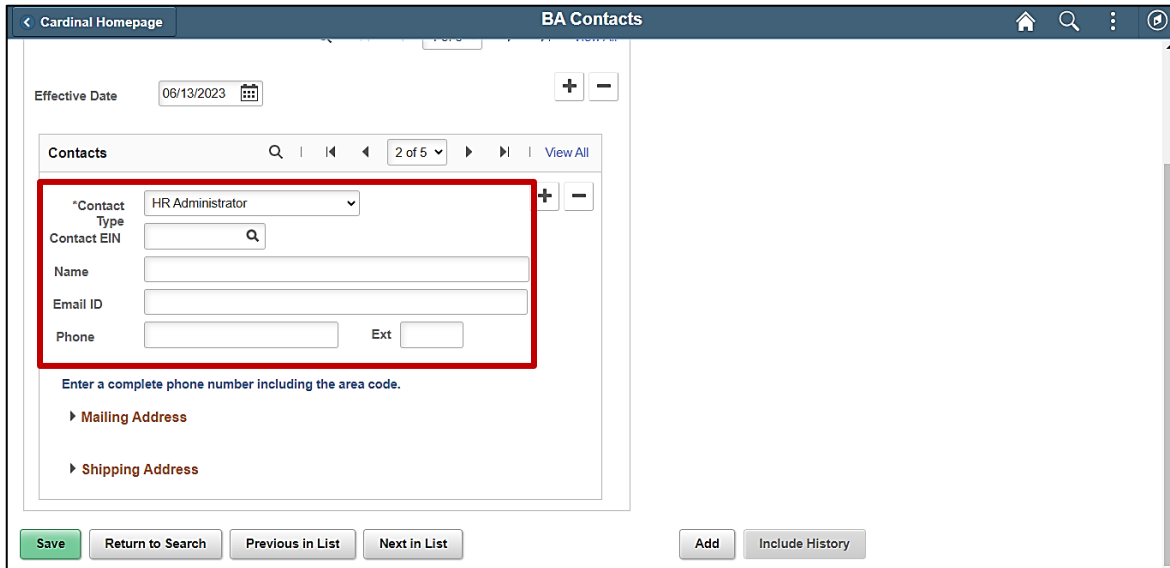


The screenshot shows the 'BA Contacts' form in the Cardinal system. The 'Contact Type' dropdown menu is open, displaying a list of contact types: Benefits Administrator, Benefits Executive, Billing Administrator, Billing Executive, HR Administrator, and HR Executive. The 'Benefits Administrator' option is highlighted with a blue background, indicating it is the selected option.

9. Select the applicable Contact Type by clicking the corresponding list item based on the following:

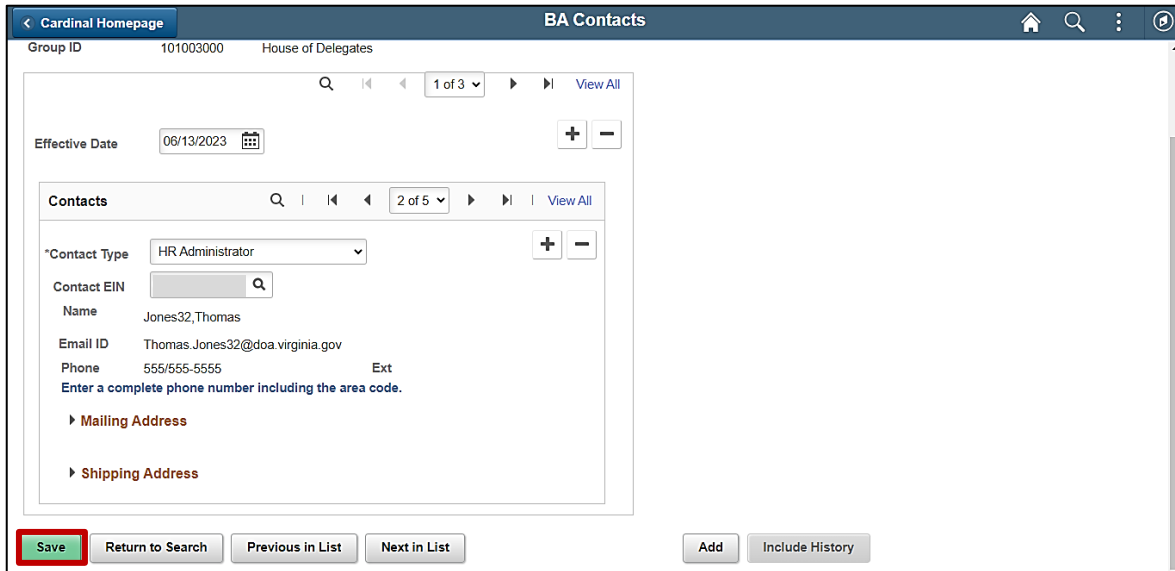
- The Benefits Administrator is the only required contact type and is the only contact who receives email notifications of updates made to dependent information through Employee Self-Service (ESS)
- The Benefit Administrator, Benefits Executive, Billing Administrator, and Billing Executive contact type details are reported to DHRM
- The HR Administrator and HR Executive contact types are for informational purposes in Cardinal

The **BA Contacts** page redisplay.



10. Enter or select the applicable employee's Employee ID Number in the **Contact EIN** field.
Note: Once entered, the **Name**, **Email ID**, and **Phone** fields will automatically populate. If a shared email address is being used, this field must not be populated.
11. Enter the applicable employee's name into the **Name** field.
12. Enter the applicable employee's email address or the shared email address into the **Email ID** field.
13. Enter the phone number information into the **Phone** and **Ext** fields as applicable.
14. Expand the **Mailing Address** section and **Shipping Address** section and populate the address information as needed.

Sample with completed data entry.



The screenshot shows a web application interface for managing BA Contacts. The top navigation bar includes 'Cardinal Homepage' and 'BA Contacts'. The main content area displays a form for a contact entry. The form is titled 'BA Contacts' and shows a 'Save' button highlighted with a red box at the bottom left. The form contains the following fields and sections:

- Group ID: 101003000
- House of Delegates
- Effective Date: 06/13/2023
- Contact Type: HR Administrator
- Contact EIN: [Searchable field]
- Name: Jones32,Thomas
- Email ID: Thomas.Jones32@doa.virginia.gov
- Phone: 555/555-5555 Ext
- Enter a complete phone number including the area code.
- Mailing Address (expandable)
- Shipping Address (expandable)

At the bottom of the form, there are buttons for 'Save', 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Include History'.

15. Click the **Save** button at the bottom of the page.

Repeat these steps for each Group ID within the Business Unit to add this new BA Contact as needed.

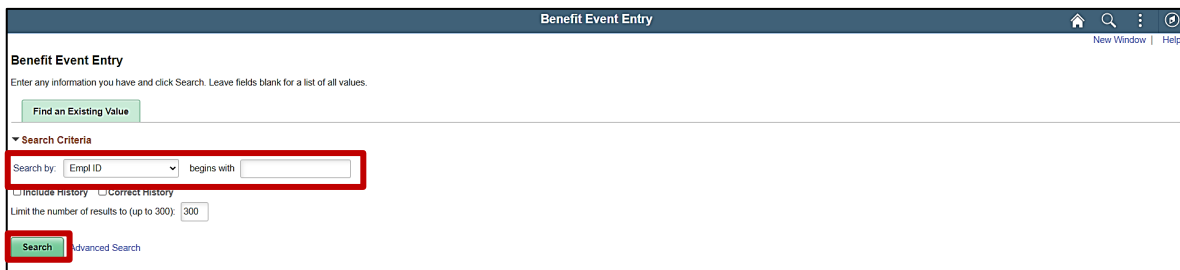
Editing an Existing BA Contact

This section of the Job Aid should be used when you need to edit the information for an existing BA Contact for your Business Unit/Group ID. This functionality can be used to edit information such as the BA Contact's phone number information and address information. A group email address can also be edited using this functionality.

1. To edit the information for an existing BA contact, navigate to the **BA Contacts** page using the following path:

Menu > Benefits > Employer Information > BA Contacts

The **BA Contacts Search** page displays.



Benefit Event Entry

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

Find an Existing Value

Search Criteria

Search by: Empl ID begins with

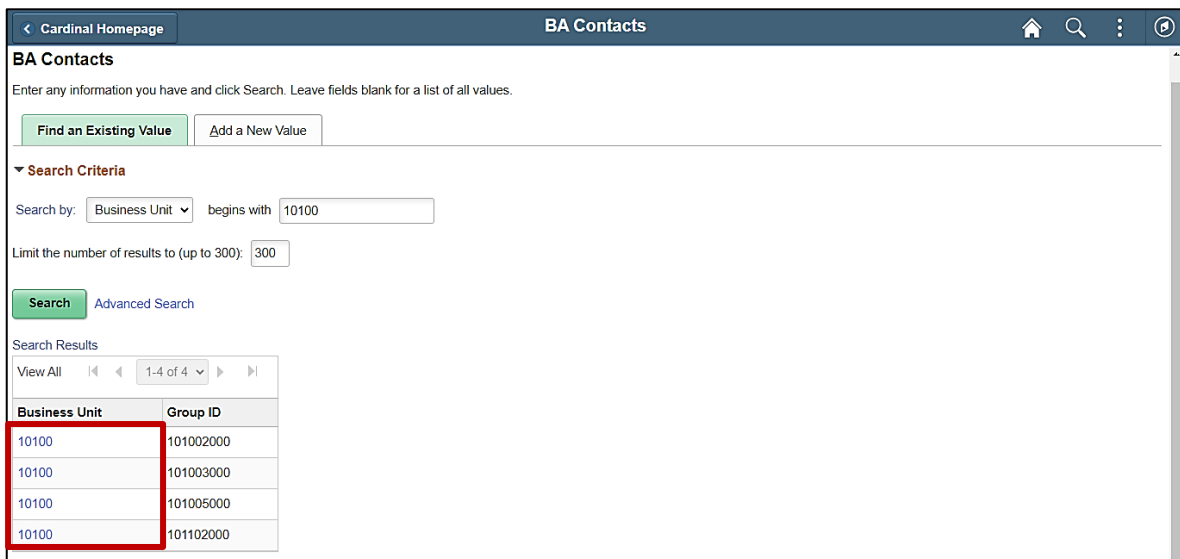
Include history Correct history

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

Search Advanced Search

2. Enter the applicable Business Unit in the **Business Unit** field.
3. Click the **Search** button.

The page refreshes and the search results display.



Cardinal Homepage BA Contacts

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

Find an Existing Value Add a New Value

Search Criteria

Search by: Business Unit begins with 10100

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

Search Advanced Search

Search Results

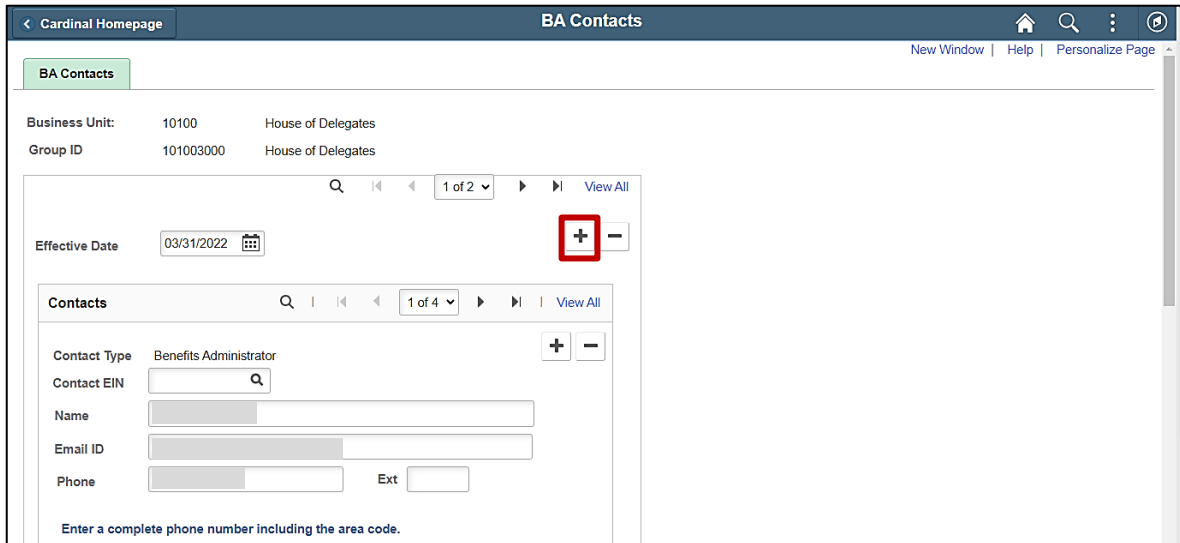
View All 1-4 of 4

Business Unit	Group ID
10100	101002000
10100	101003000
10100	101005000
10100	101102000

4. Click the **Business Unit** link for the corresponding Group ID.

Note: Each Group ID must be updated individually.

The **BA Contacts** page displays for the applicable Group ID.



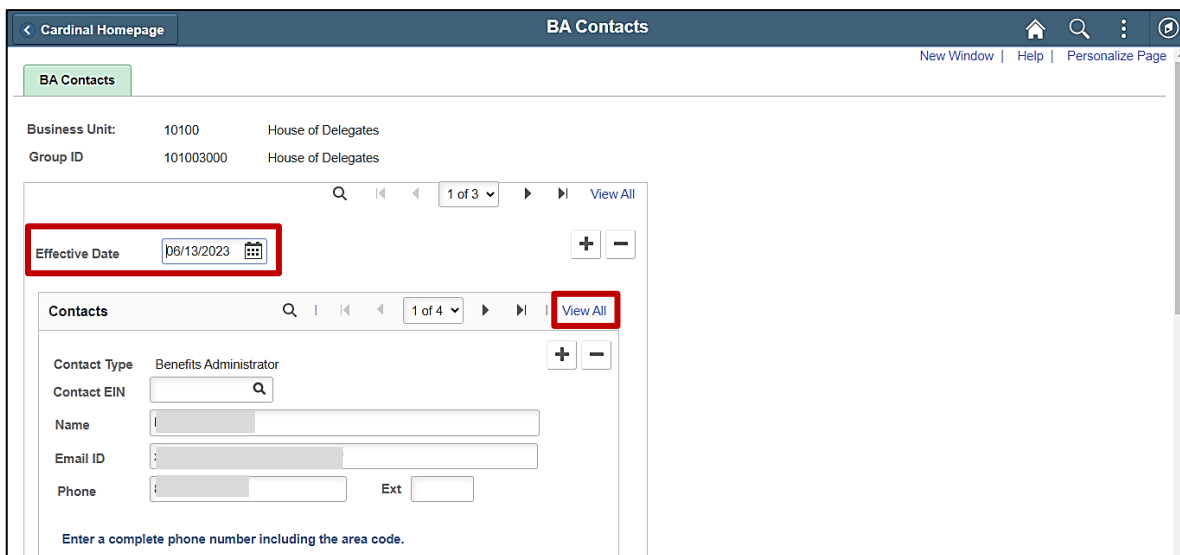
The screenshot shows the 'BA Contacts' page in a web browser. The page title is 'BA Contacts'. The breadcrumb is '< Cardinal Homepage'. The page has a search bar, a home icon, and a 'Personalize Page' link. The main content area shows the following information:

- Business Unit: 10100 House of Delegates
- Group ID: 101003000 House of Delegates

Below this information is a table with one row. The 'Effective Date' is '03/31/2022'. To the right of the date is a red box containing a '+' icon and a '-' icon. Below the table is a 'Contacts' section with a search bar and a 'View All' link. The 'Contacts' section has a dropdown menu set to '1 of 4'. Below the dropdown are several input fields: 'Contact Type' (Benefits Administrator), 'Contact EIN', 'Name', 'Email ID', 'Phone', and 'Ext'. A note at the bottom of the 'Contacts' section says 'Enter a complete phone number including the area code.'

5. A new effective dated row must be created before making the required edits to the BA Contact information. Click the **Add a New Row (+)** icon to add a new effective dated row.

The page refreshes with a new effective dated row.



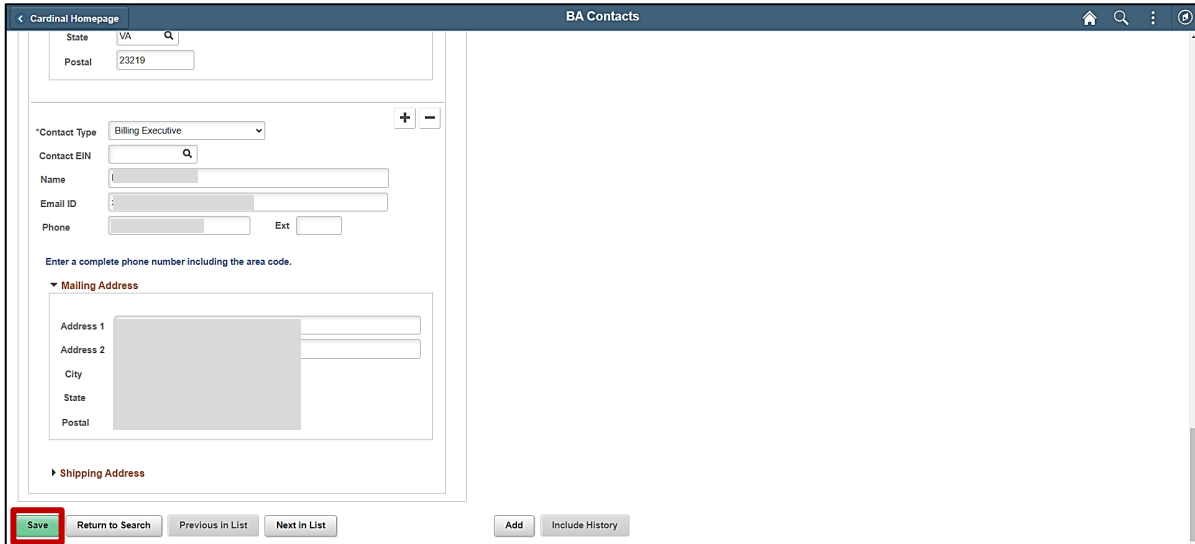
The screenshot shows the 'BA Contacts' page after a refresh. The page title is 'BA Contacts'. The breadcrumb is '< Cardinal Homepage'. The page has a search bar, a home icon, and a 'Personalize Page' link. The main content area shows the following information:

- Business Unit: 10100 House of Delegates
- Group ID: 101003000 House of Delegates

Below this information is a table with one row. The 'Effective Date' is '06/13/2023'. To the right of the date is a '+' icon and a '-' icon. Below the table is a 'Contacts' section with a search bar and a 'View All' link. The 'Contacts' section has a dropdown menu set to '1 of 4'. Below the dropdown are several input fields: 'Contact Type' (Benefits Administrator), 'Contact EIN', 'Name', 'Email ID', 'Phone', and 'Ext'. A note at the bottom of the 'Contacts' section says 'Enter a complete phone number including the area code.'

6. The **Effective Date** defaults to the current system date. Update as needed using the **Effective Date Calendar** icon.
7. Click the **View All** link within the **Contacts** sections.

- The page refreshes and all rows within the **Contacts** section are displayed. Scroll down to the Contact Type that requires editing.



The screenshot shows the 'BA Contacts' form in the Cardinal system. The form is divided into several sections. At the top, there are fields for 'State' (VA) and 'Postal' (23219). Below that is a 'Contact Type' dropdown menu set to 'Billing Executive'. There are also fields for 'Contact EIN', 'Name', 'Email ID', 'Phone', and 'Ext'. A note below the phone fields says 'Enter a complete phone number including the area code.' There are two address sections: 'Mailing Address' and 'Shipping Address'. The 'Mailing Address' section has fields for 'Address 1', 'Address 2', 'City', 'State', and 'Postal'. The 'Shipping Address' section is currently collapsed. At the bottom of the form, there are several buttons: 'Save' (highlighted with a red box), 'Return to Search', 'Previous in List', 'Next in List', 'Add', and 'Include History'.

- Edit and update BA Contact information as needed.

Note: Edits can be made to the phone information or the address information. Group email address information can also be edited. If edits are required to the name or Contact EIN, the existing BA contact should be deleted and the new BA Contact should be added.

- Click the **Save** button.

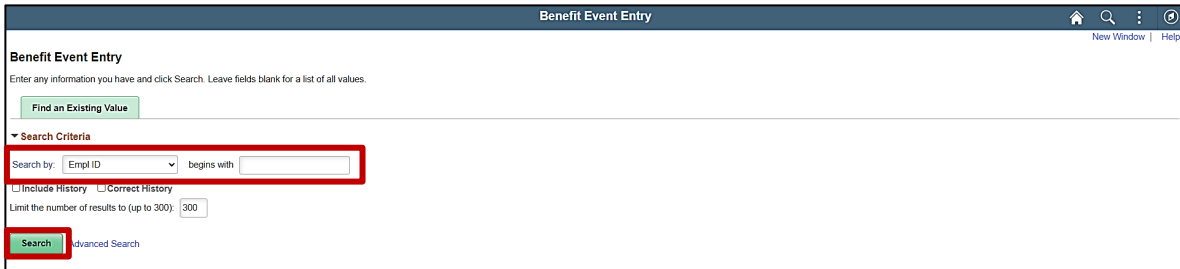
Repeat these steps for each Group ID within the Business Unit to edit this BA Contact as needed.

Deleting an Existing BA Contact

This section of the Job Aid should be used when you need to delete an existing BA Contact for your Business Unit/Group ID.

1. To delete an existing BA contact, navigate to the **BA Contacts** page using the following path:
Menu > Benefits > Employer Information > BA Contacts

The **BA Contacts Search** page displays.



Benefit Event Entry

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

Find an Existing Value

Search Criteria

Search by: Empl ID begins with

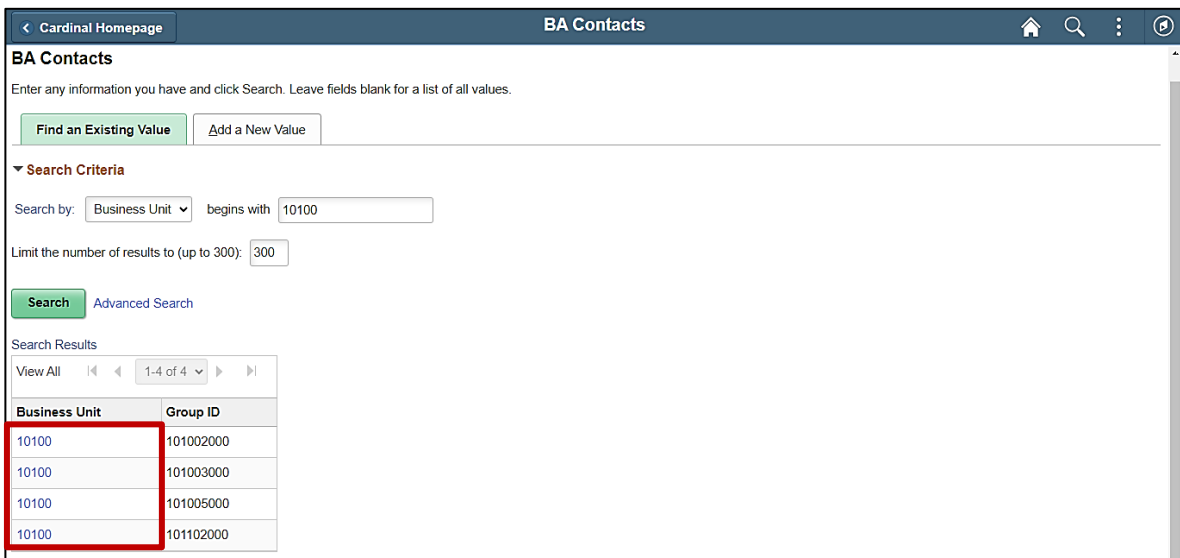
Include History Correct History

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

Search Advanced Search

2. Enter the applicable Business Unit in the **Business Unit** field.
3. Click the **Search** button.

The page refreshes and the search results display.



Cardinal Homepage BA Contacts

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

Find an Existing Value Add a New Value

Search Criteria

Search by: Business Unit begins with 10100

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

Search Advanced Search

Search Results

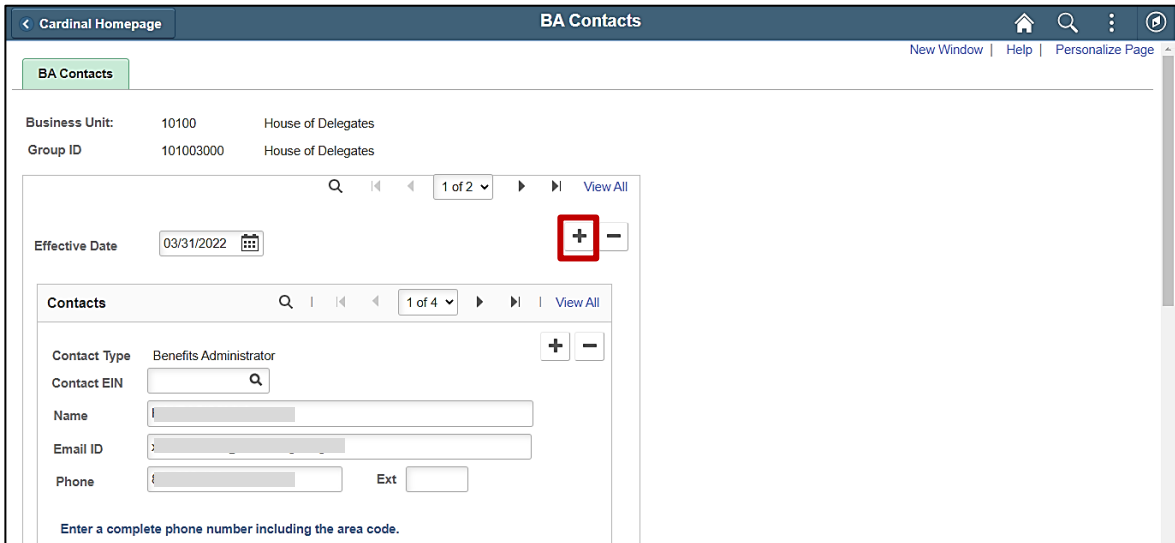
View All 1-4 of 4

Business Unit	Group ID
10100	101002000
10100	101003000
10100	101005000
10100	101102000

4. Click the **Business Unit** link for the corresponding Group ID.

Note: Each Group ID must be updated individually.

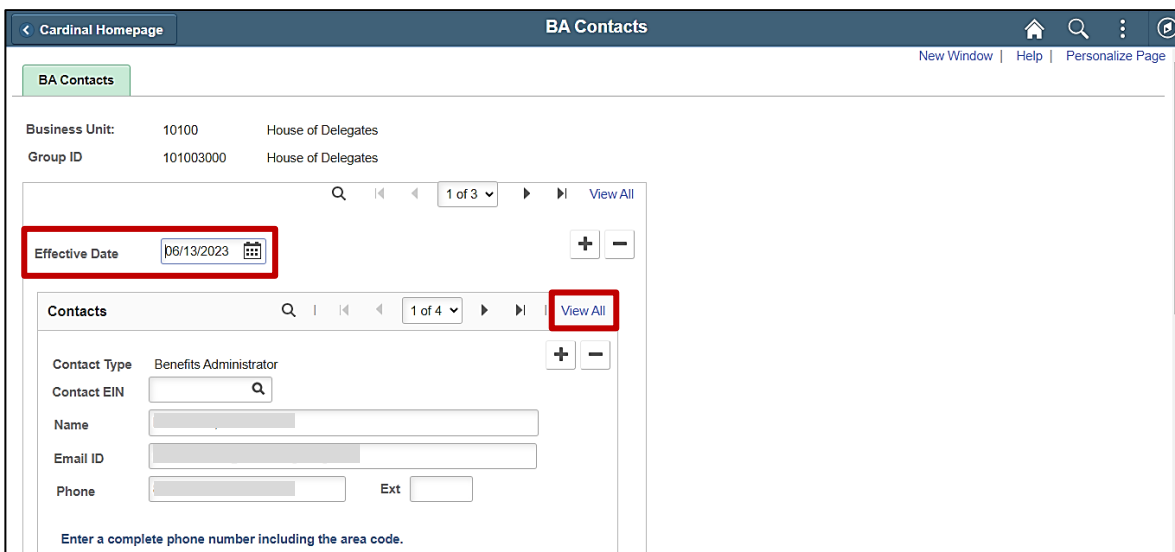
The **BA Contacts** page displays for the applicable Group ID.



The screenshot shows the 'BA Contacts' page. At the top, there are navigation links: '< Cardinal Homepage', 'BA Contacts', 'New Window', 'Help', and 'Personalize Page'. Below this, the page displays 'Business Unit: 10100 House of Delegates' and 'Group ID 101003000 House of Delegates'. A search bar and pagination controls (1 of 2) are visible. The 'Effective Date' field is set to '03/31/2022' and has a calendar icon and a red box around a '+' icon. Below this is the 'Contacts' section with a search bar and pagination (1 of 4). The 'Contact Type' is 'Benefits Administrator'. There are input fields for 'Contact EIN', 'Name', 'Email ID', and 'Phone' (with an 'Ext' field). A note at the bottom says 'Enter a complete phone number including the area code.'

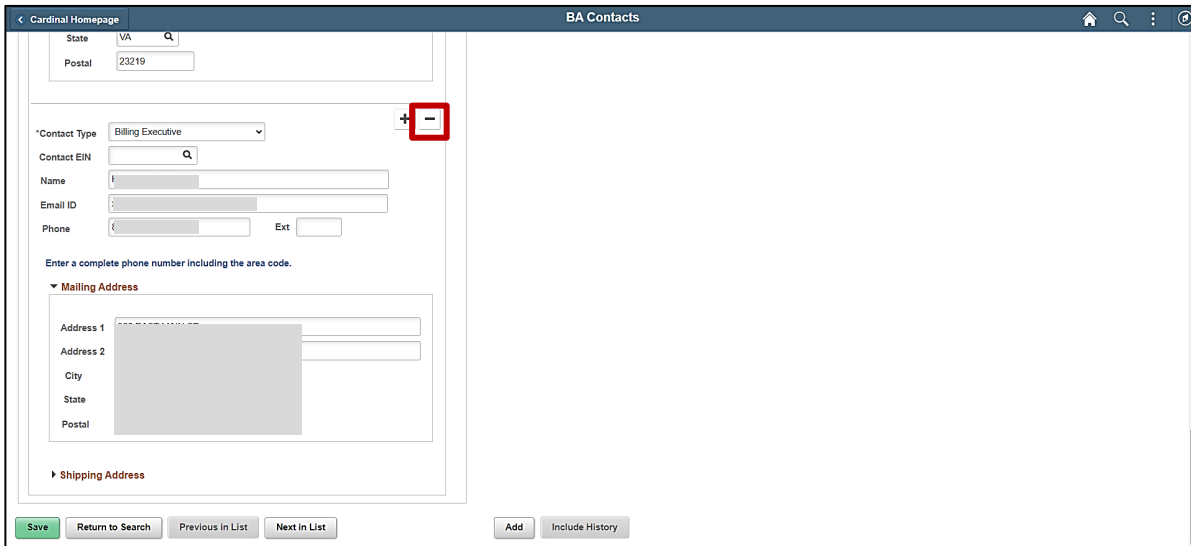
5. A new effective dated row must be created before deleting the BA Contact. Click the **Add a New Row (+)** icon to add a new effective dated row.

The page refreshes with a new effective dated row.



The screenshot shows the 'BA Contacts' page after a refresh. The 'Effective Date' field is now '06/13/2023' and is highlighted with a red box. The 'Contacts' section now shows '1 of 4' contacts, and the 'View All' link is highlighted with a red box. The rest of the page layout is the same as the previous screenshot.

6. The **Effective Date** defaults to the current system date. Update as needed using the **Effective Date Calendar** icon.
7. Click the **View All** link within the **Contacts** sections.
8. The page refreshes and all rows within the **Contacts** section are displayed. Scroll down to the BA Contact that needs to be deleted.



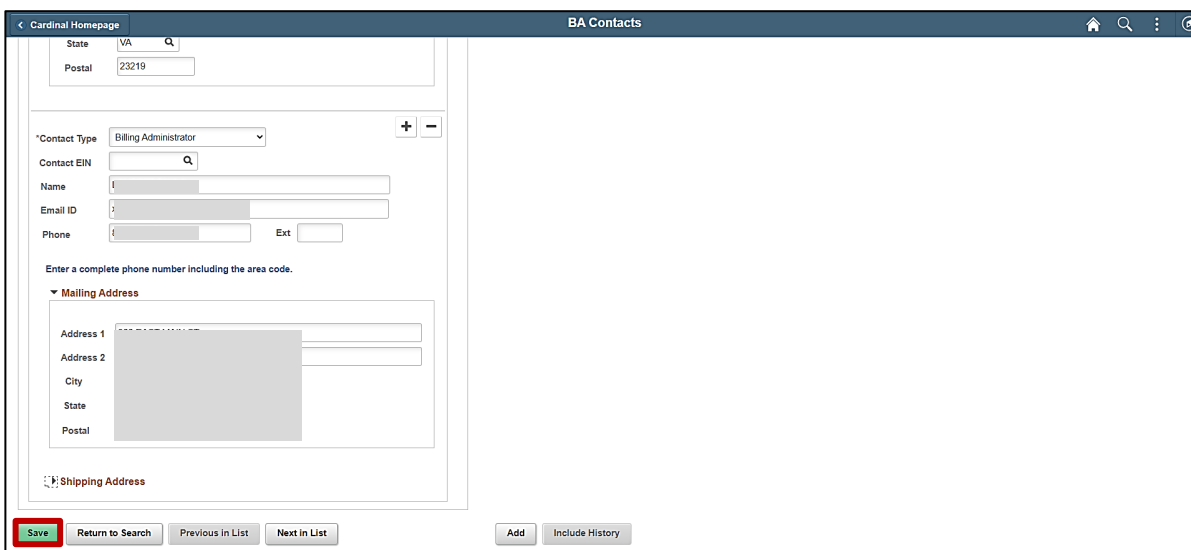
9. Click the **Delete Row** icon (-) for the applicable BA Contact.

A **Confirmation** message displays in a pop-up window.



10. Click the **OK** button to confirm the deletion.

The **BA Contacts** page redisplay.



Note: The deleted BA Contact no longer displays.

11. Click the **Save** button.

Repeat these steps for each Group ID within the Business Unit to delete this BA Contact as needed.