

Reviewing Employee Benefits Information Overview

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

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

Navigation Note: Please note that 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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Reviewing the Health Benefits Page

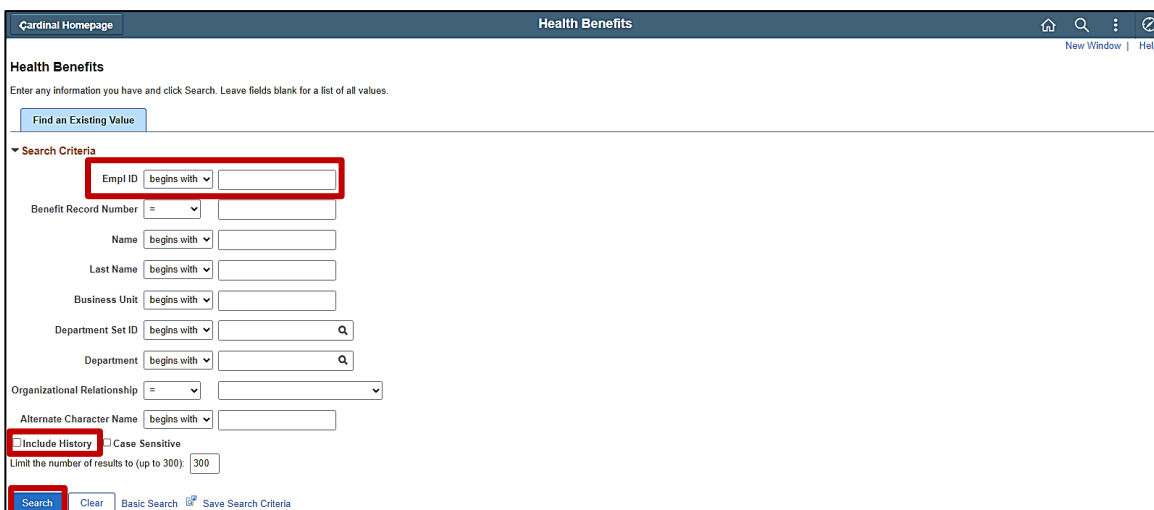
The **Health Benefits** page is used to review the health plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The enrolled dependents are also available for review on this page as applicable.

Note: Do not use this page to create or update enrollments. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

1. Access the **Health Benefits** page using the following navigation path:

NavBar > Menu > Benefits > Enroll in Benefits > Health Benefits

The **Health Benefits Search** page displays.



2. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

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



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The **Health Benefits** page displays.

The screenshot shows the 'Health Benefits' page for an employee. At the top, it displays 'Cardinal Homepage' and 'Health Benefits'. Below this, the employee's name 'Top Water' and ID '00860035000' are shown. The 'Plan Type' section shows 'Plan Type 10 Medical' with a 'View All' link highlighted in a red box. The 'Coverage' section includes fields for '*Coverage Begin Date' (08/01/2023) and '*Deduction Begin Date' (08/01/2023). The 'Coverage Election' section has radio buttons for 'Elect' (selected), 'Waive', and 'Terminate', with an '*Election Date' of 12/06/2023. Below this, there are dropdown menus for 'Benefit Program' (SalBenPrgrm), 'Benefit Plan' (ACCO), 'Coverage Code' (1), and 'Option Code' (25). There is also a checkbox for 'Previously Seen'. An 'Enroll All Dependents' button is visible. At the bottom, there is a 'Dependent/Beneficiaries' section with a table header including 'ID', 'Name', 'Relationship to Employee', 'Health Provider ID', 'Prev Seen', 'Covered Person Type', and 'Age Limit Flg'.

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

Reviewing the Simple Benefits Page

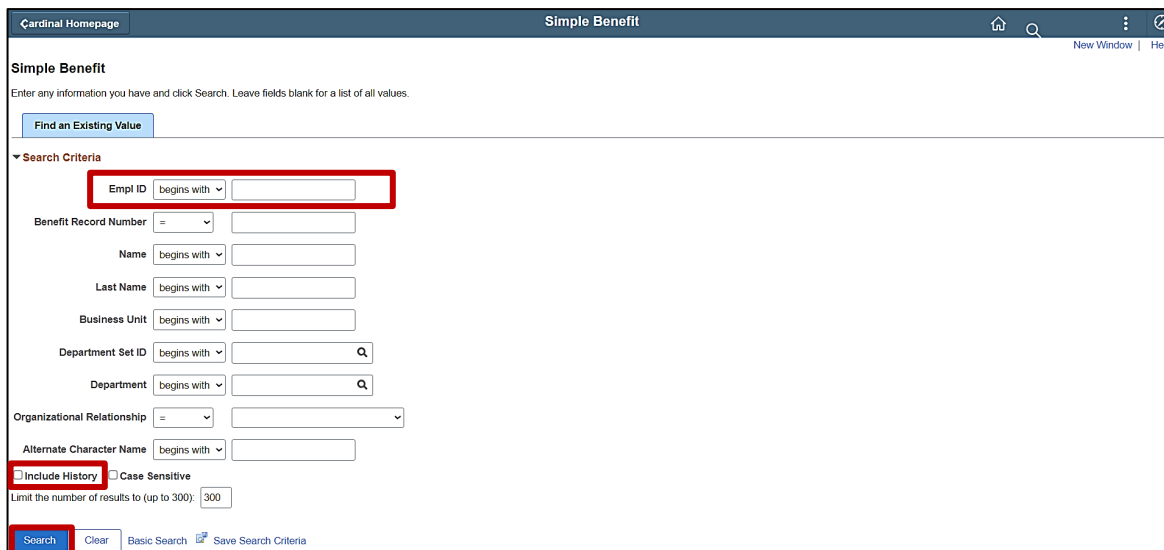
The **Simple Benefits** page is used to review the Premium Reward and Flex Spending Admin Fee enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Do not use this page to create or update enrollments. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

1. Access the **Simple Benefits** page using the following navigation path:

NavBar > Menu > Benefits > Enroll in Benefits > Simple Benefits

The **Simple Benefits Search** page displays.

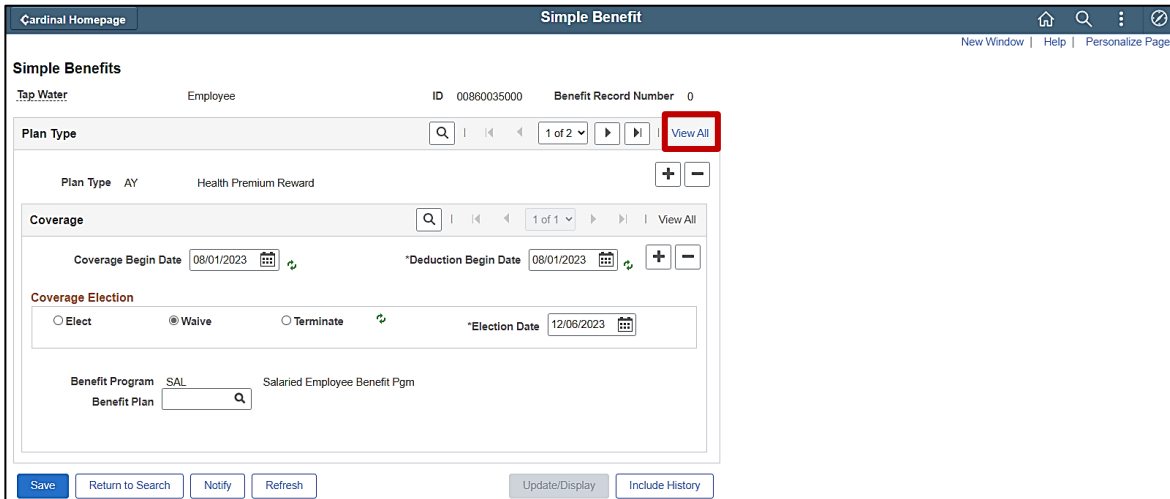


2. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

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

The **Simple Benefits** page displays.



Cardinal Homepage Simple Benefit

Employee ID 00860035000 Benefit Record Number 0

Plan Type AY Health Premium Reward

Coverage Begin Date 08/01/2023 Deduction Begin Date 08/01/2023

Coverage Election

Elect Waive Terminate Election Date 12/06/2023

Benefit Program SAL Salaried Employee Benefit Pgm

Benefit Plan

Save Return to Search Notify Refresh Update/Display Include History

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

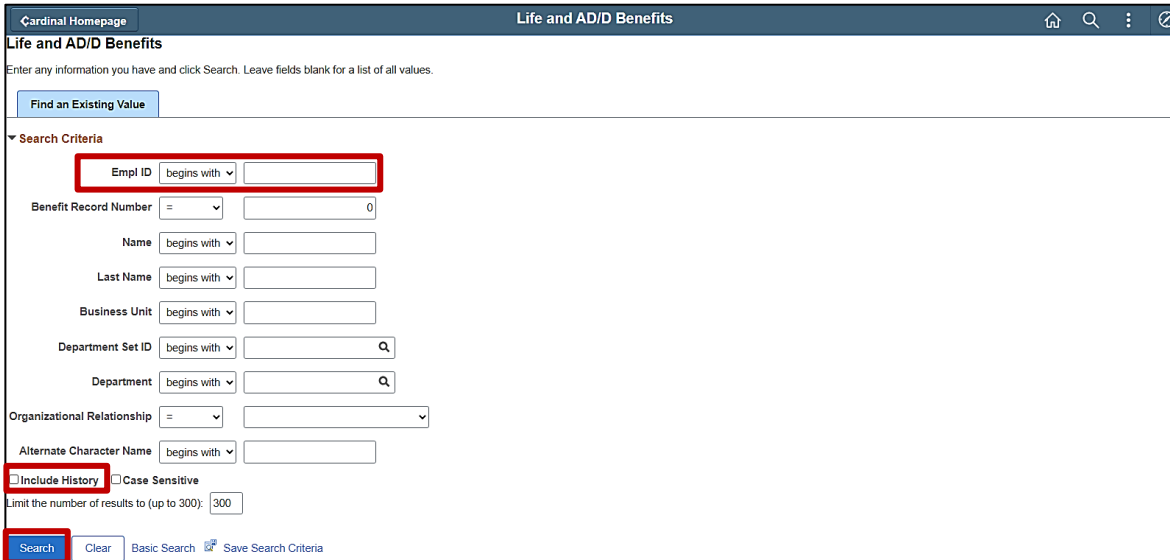
Reviewing the Life and AD/D Benefits Page

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

1. Access the **Life and AD/D Benefits** page using the following navigation path:

NavBar > Menu > Benefits > Enroll in Benefits > Life and AD/D Benefits

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



Cardinal Homepage Life and AD/D Benefits

Life and AD/D Benefits

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

Find an Existing Value

▼ Search Criteria

Empl ID begins with []

Benefit Record Number = [] 0

Name begins with []

Last Name begins with []

Business Unit begins with []

Department Set ID begins with []

Department begins with []

Organizational Relationship = []

Alternate Character Name begins with []

Include History Case Sensitive

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

Search Clear Basic Search Save Search Criteria

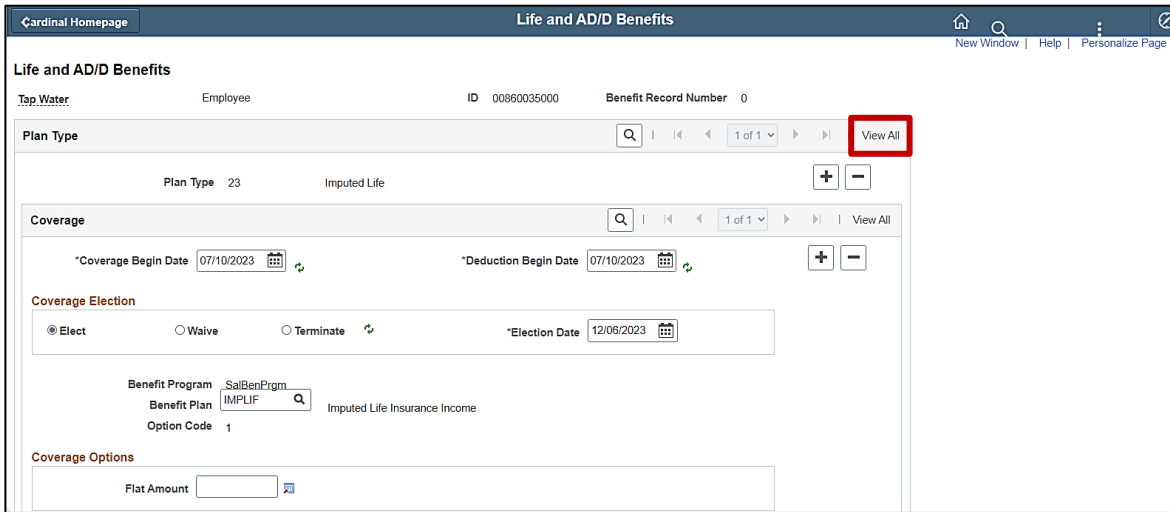
2. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

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

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



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

Reviewing the Spending Accounts Page

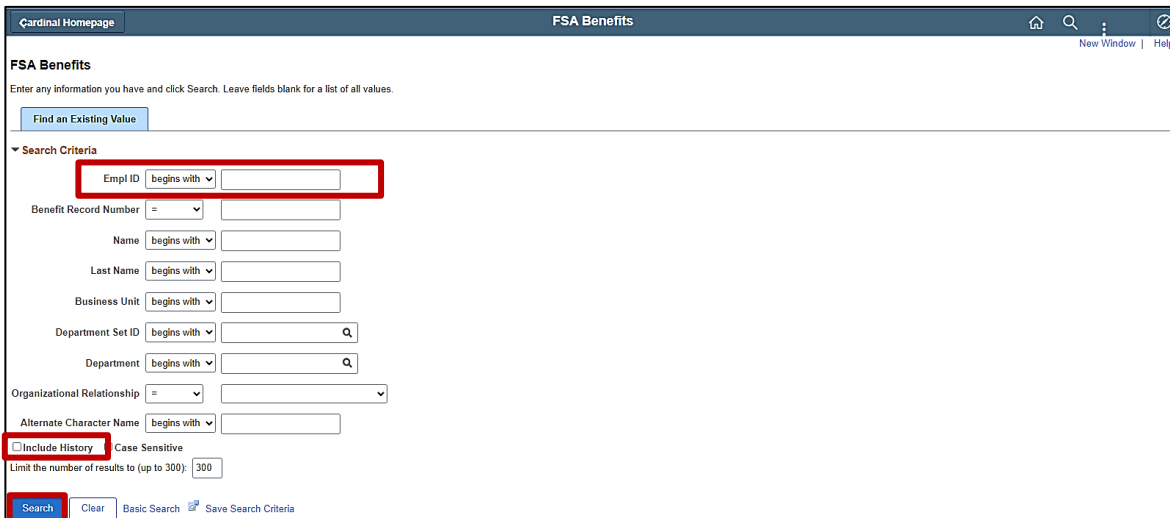
The **Spending Accounts** page is used to review the Flex Spending Medical and Flex Spending Dependent Care plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. Remember, employees must elect Flex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

Note: Do not use this page to create or update enrollments. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

1. Access the **Spending Accounts** page using the following navigation path:

NavBar > Menu > Benefits > Enroll in Benefits > Spending Accounts

The **FSA Benefits Search** page displays.



2. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

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



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The **Spending Accounts** page displays.

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

Reviewing the Savings Plans Page

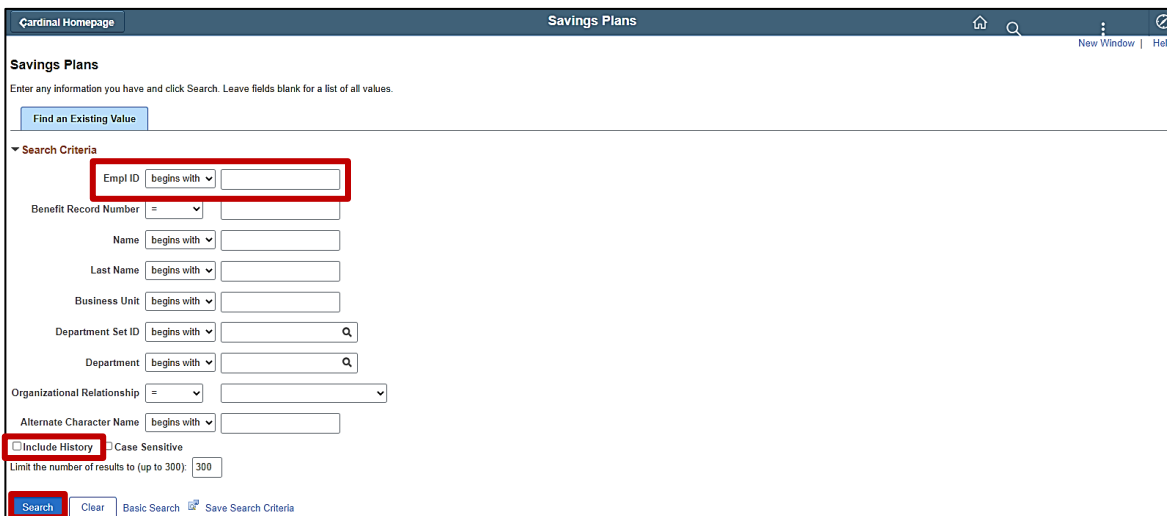
The **Savings Plans** page is used to review the Savings Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The assigned Beneficiary(ies) are also available for review on this page as applicable.

Note: Do not use this page to create or update enrollments. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

1. Access the **Savings Plans** page using the following navigation path:

NavBar > Menu > Benefits > Enroll in Benefits > Savings Plans

The **Savings Plans Search** page displays.



2. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

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



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The **Savings Plans** page displays.

The screenshot shows the 'Savings Plans' page for an employee. The page includes the following sections:

- Plan Type:** Shows Plan Type 46 and 403(b). A red box highlights the 'View All' link.
- Coverage:** Shows Coverage Begin Date 01/01/2024 and Deduction Begin Date 01/01/2024.
- Coverage Election:** Shows options for Elect, Waive, and Terminate. The Election Date is 12/06/2023.
- Benefit Program:** Shows SAL (SalBenPrgm) and Benefit Plan 403P12 (403(b) Plan 12 pay period EE).
- Option Code:** Shows 1.
- Investment Options:** Includes 'Before Tax Investment' and 'After Tax Investment' sections, each with 'Flat Amount' and 'Percent of Earnings' input fields. The 'Percent of Earnings' field is set to 5.000.
- Payroll Status:** Active.
- Dependent/Beneficiaries:** A section with a search icon and a '1-1 of 1' dropdown.
- Table:** A table with columns: *ID, Name, Relationship to Employee, Beneficiary Percentage, Flat Amount, Excess, and Contingent.

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

Reviewing the Retirement Plans Page

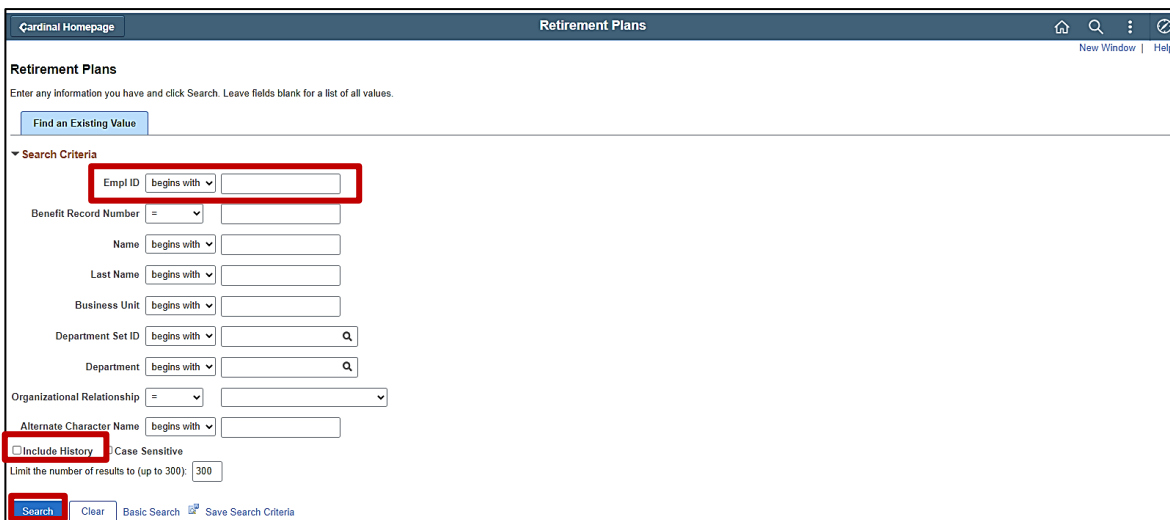
The **Retirement Plans** page is used to review the Retirement Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Do not use this page to create or update enrollments. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal or through VRS.

1. Access the **Retirement Plans** page using the following navigation path:

NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans

The **Retirement Plans Search** page displays.

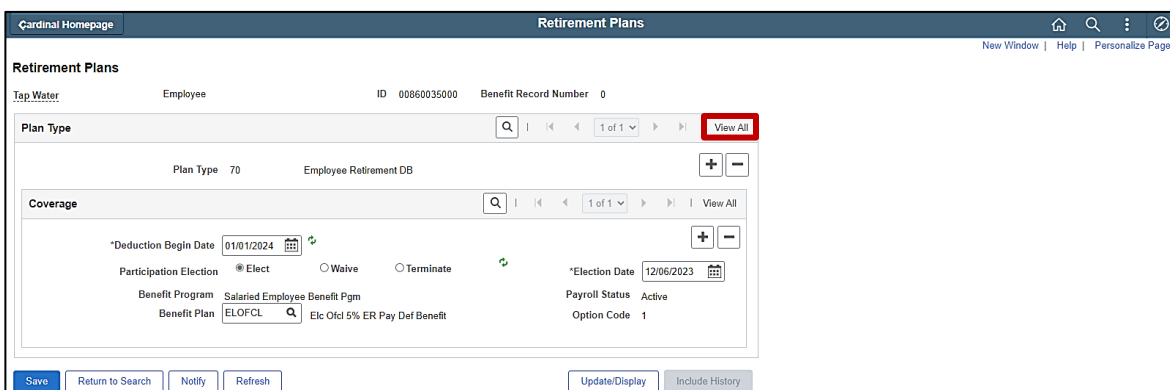


2. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

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

The **Retirement Plans** page displays.



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

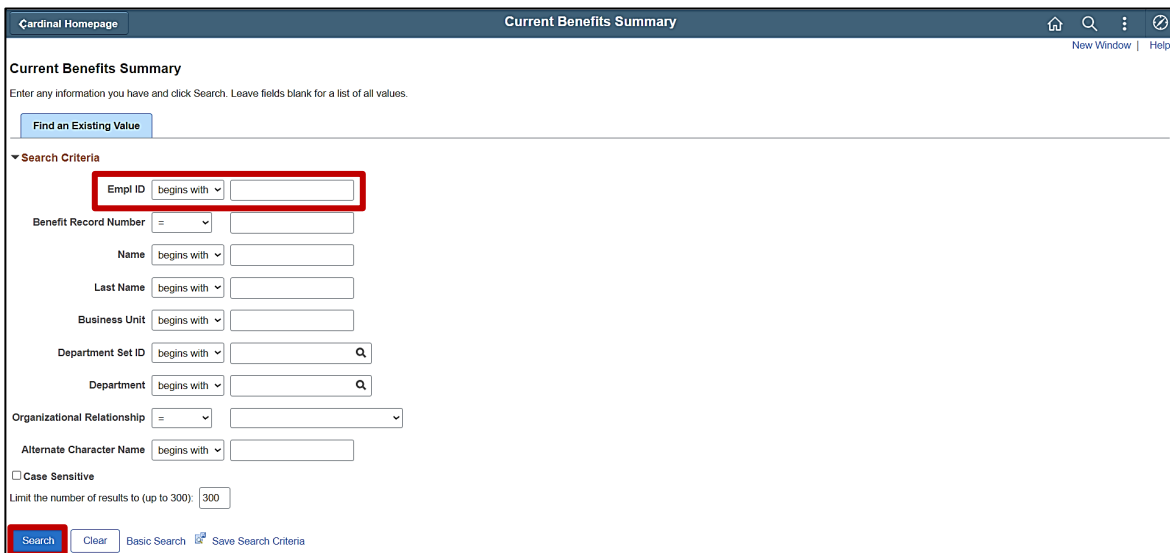
Reviewing the Current Benefits Summary Page

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

1. Access the **Current Benefits Summary** page using the following navigation path:

NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary

The **Current Benefits Summary** page displays:



The screenshot shows a web browser window titled "Current Benefits Summary". The page has a search bar at the top with the text "Enter any information you have and click Search. Leave fields blank for a list of all values." Below the search bar is a "Find an Existing Value" button. The main section is titled "Search Criteria" and contains several search fields: "Empl ID" (with a dropdown menu set to "begins with" and a text input field), "Benefit Record Number" (with a dropdown menu set to "=" and a text input field), "Name" (with a dropdown menu set to "begins with" and a text input field), "Last Name" (with a dropdown menu set to "begins with" and a text input field), "Business Unit" (with a dropdown menu set to "begins with" and a text input field), "Department Set ID" (with a dropdown menu set to "begins with" and a text input field with a search icon), "Department" (with a dropdown menu set to "begins with" and a text input field with a search icon), "Organizational Relationship" (with a dropdown menu set to "=" and a text input field), and "Alternate Character Name" (with a dropdown menu set to "begins with" and a text input field). There is also a "Case Sensitive" checkbox and a "Limit the number of results to (up to 300):" field with a value of "300". At the bottom of the search criteria section are buttons for "Search", "Clear", "Basic Search", and "Save Search Criteria".

2. Enter the employee's Employee ID in the **Empl ID** field.

Note: Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.

3. Click the **Search** button.



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

The screenshot shows the 'Current Benefits Summary' page for employee Tap Water. The 'Benefit Deduction Summary' tab is highlighted with a red box. The page displays employee information and a table of current enrollments.

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

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

The **Benefit Deduction Summary** tab displays.

The screenshot shows the 'Current Benefits Summary' page for employee Tap Water. The 'Benefit Deduction Summary' tab is selected. The page displays payroll information.

Payroll System	Payroll for North America
Pay Group	SM1 - Semimonthly Class (FRITHU07)
Payroll Status	Active

6. Review the information as needed.