Benefits Personal Data Overview

This Job Aid provides guidance on the actions a Benefits Administrator (BA) must take on the Benefits Personal Data page before enrolling an employee in Medicare benefits.

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The Benefits Personal Data Page

Before enrolling an employee in Medicare Benefits, the Agency BA must complete the information shown on the **Benefits Personal Data** page.

1. Access the **Benefits Personal Data** page using the following path:

    Navigator > Benefits > Employee/Dependent Information > Benefits Personal Data

The **Benefits Personal Data Search** page appears.

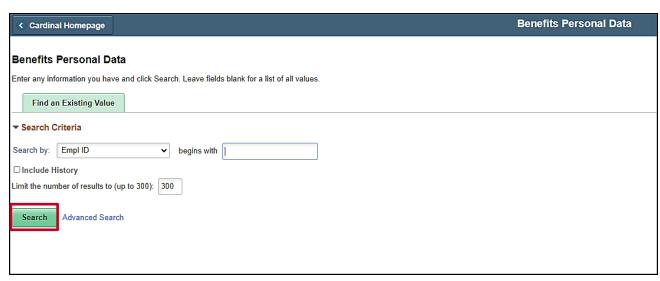2. Enter the Employee ID in the **Empl ID** field.

Note: You can also search by entering the beginning of the Name, or other search criteria using the corresponding drop-down options. However, it is recommended to use the Employee ID as it is a unique identifier for each employee. Cardinal security restricts the user to seeing only their agency employees.

3. Click the **Search** button.
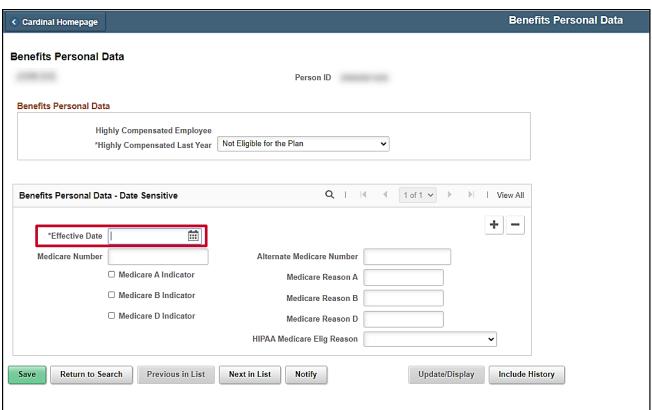

4. Enter the first of the month in which the employee is eligible for Medicare in the **Effective Date** field on the **Benefits Personal Data** page.
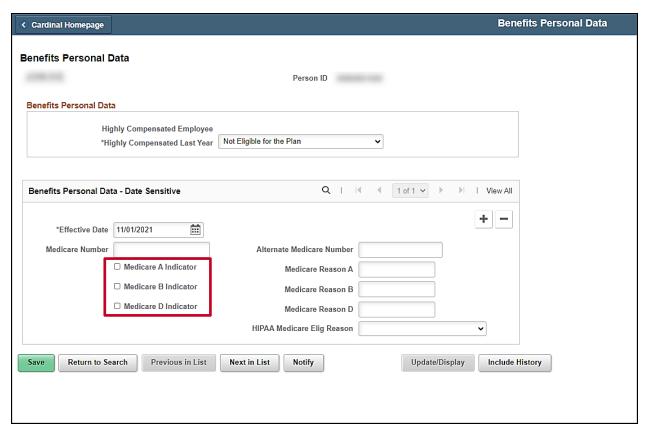
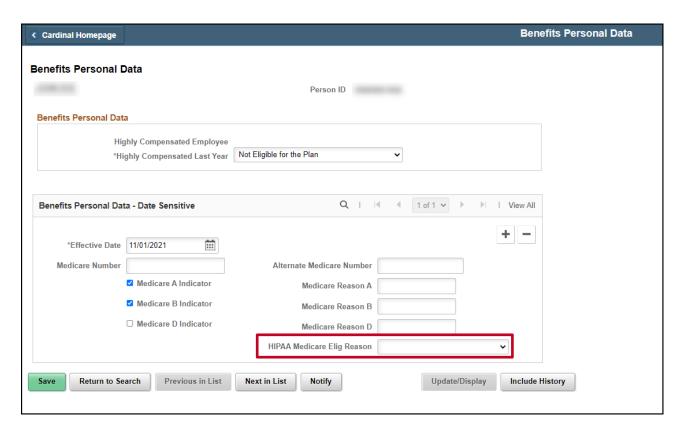5. Check the boxes next to **Medicare A** and **Medicare B**.

Note: Both need to be checked for the employee to be enrolled in Medicare.

6. Select the corresponding **HIPAA Medicare Elig Reason**:

   a. Age

   b. Disability

   c. End Stage Renal Disease
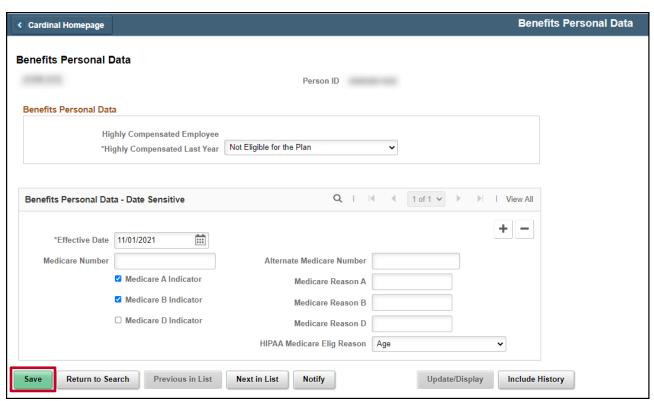
7. Click the **Save** button.