



BN361_Important Tips & Reminders Overview

The purpose of this document is to provide Benefit Administrators with tips and reminders on their day-to-day tasks. This desk aid is to be used as a guide for daily transactions.

Tips & Reminders

1. Processing a Divorce Event
 - a. Submitted by the BA:
 - i. Remember to add the COBRA Action of DIV in the **Review BAS Activity** page when adding the manual event
 - ii. Remember to update the dependent's status to Ex-Spouse on the Personal Profile tab before finalizing the event
 - b. Submitted through ESS:
 - i. Confirm the employee (EE) submitted the supporting documentation in time according to policy and confirm the EE updated the spouse to Ex-Spouse
 - ii. Remember to check and make sure the EE updated the spouse to Ex-Spouse
2. Daily Reports to track events submitted through ESS.
 - a. Run the Benefit Event Status report daily to know if an employee has created an event in ESS.
 - b. Run the Benefit Eligibility Audits Report to see if any dependents need BA approval.
3. Missing Social Security Number (SSN):
 - a. Leave the field BLANK if the SSN is unknown, do not put a filler number
4. Reopening an event:
 - a. Process Status of Assign Benefit Program is used to completely erase all current elections made on that event. It will reevaluate eligibility for that benefit event
 - i. It will not delete any dependent data that was added
 - b. Process Status of Re-Enter is used to change a specific election on the event or to approve a dependent
5. Approving a Dependent:
 - a. Receive the supporting documentation from the employee
 - b. Reopen the benefit event with a process status of Re-Enter
 - c. Change the Dependent Type to Approved Dependent on the Personal Profile tab
 - d. Validate/Finalize the event to trigger a new confirmation statement
6. Reviewing benefit elections:
 - a. The Current Benefits Summary displays elections as of "today", not future, or past dates
 - b. The Enroll in Benefits section in Cardinal shows future dated elections and history rows