

**ORP Retiree Guide Overview**

The purpose of this Job Aid is to provide the complete step-by-step process for the two most common ORP Retiree scenarios. These instructions include transactions completed both by a Human Resources (HR) Administrator and a Benefits (BN) Administrator. The two scenarios covered in this guide are:

- Scenario 1: Employee has Self + Spouse coverage. The employee retires and both the employee and spouse are under the age of 65
- Scenario 2: Employee retires with family coverage. The employee is over 65 and the spouse is not. If the employee turns 65 with family coverage, hire the youngest dependent as an employee following the same steps as hiring a spouse and enrolling in benefits

The HR Administrator and the BN Administrator will need to work together closely to complete these transactions.

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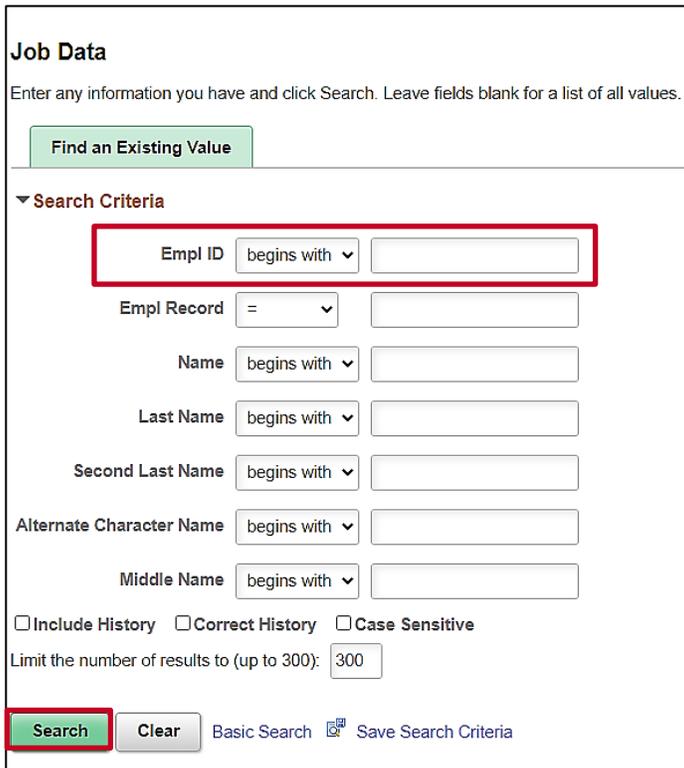
**Scenario 1****Retirement Process**

First, the employee must be retired. This transaction is completed by an HR Administrator.

1. Navigate to the **Job Data** page using the following path:

**Navigator > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.



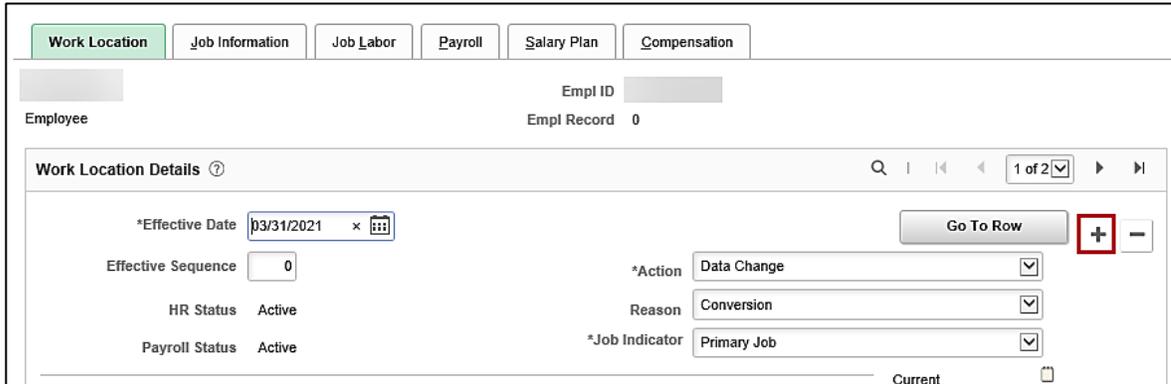
2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

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The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section displays one row with the following information:

- \*Effective Date: 03/31/2021
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- \*Action: Data Change
- Reason: Conversion
- \*Job Indicator: Primary Job

The 'Go To Row' button has a '+' icon highlighted with a red box.

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

The **Work Location** tab refreshes with a new effective dated row displayed.



The screenshot shows the 'Work Location' tab selected. The 'Work Location Details' section displays two rows:

- Row 1: \*Effective Date: 03/31/2021, Effective Sequence: 0, HR Status: Active, Payroll Status: Active, \*Action: Data Change, Reason: Conversion, \*Job Indicator: Primary Job.
- Row 2: \*Effective Date: 05/24/2022, Effective Sequence: 0, HR Status: Active, Payroll Status: Active, \*Action: Data Change, Reason: (Invalid Value), \*Job Indicator: Primary Job.

The '+' icon next to the 'Go To Row' button is highlighted with a red box.

**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

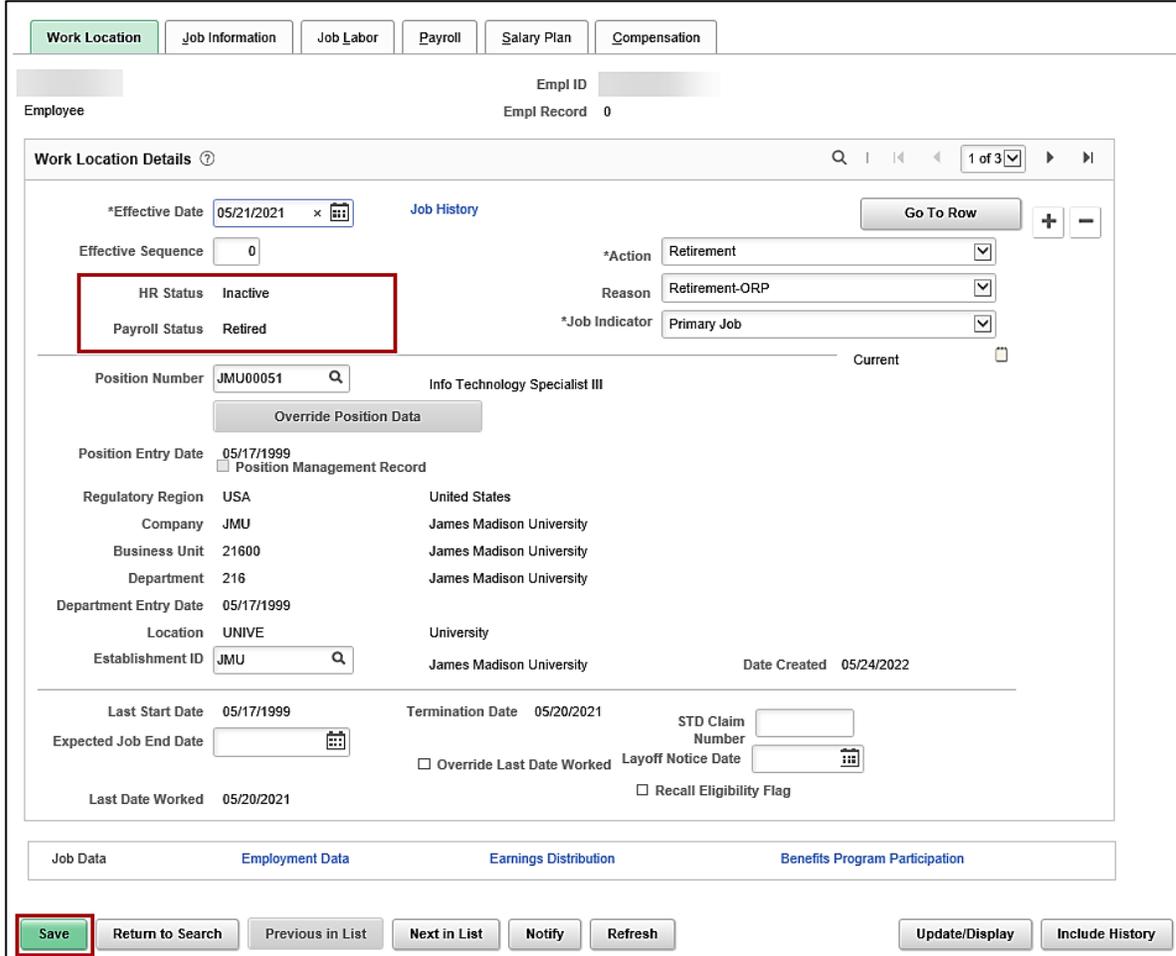
- The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.

**Note:** Set the effective date to be one day after the employee's last day worked. If an employee's last day is 5/20/2021, the effective date of the retirement should be 05/21/2021. For further information on effective dating, see the Job Aid titled **HR351\_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Make a note of the retirement effective date. This will be used as the effective date when entering the ORP hire row.

- Select the "Retirement" list item using the **Action** field dropdown button.
- Select the "Retirement – ORP" list item using the **Reason** field dropdown button.

The **Job Data** page (**Work Location** tab) refreshes.



The screenshot displays the 'Work Location Details' page for an employee. The page is divided into several sections:

- Navigation:** Tabs for Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation.
- Employee Info:** Empl ID and Empl Record 0.
- Work Location Details:**
  - \*Effective Date: 05/21/2021
  - Effective Sequence: 0
  - HR Status: Inactive (highlighted in red)
  - Payroll Status: Retired (highlighted in red)
  - \*Action: Retirement
  - Reason: Retirement-ORP
  - \*Job Indicator: Primary Job
  - Position Number: JMU00051 (Info Technology Specialist III)
  - Position Entry Date: 05/17/1999
  - Regulatory Region: USA (United States)
  - Company: JMU (James Madison University)
  - Business Unit: 21600 (James Madison University)
  - Department: 216 (James Madison University)
  - Department Entry Date: 05/17/1999
  - Location: UNIVE (University)
  - Establishment ID: JMU (James Madison University)
  - Date Created: 05/24/2022
  - Last Start Date: 05/17/1999
  - Termination Date: 05/20/2021
  - Expected Job End Date: (calendar icon)
  - Last Date Worked: 05/20/2021
  - STD Claim Number: (input field)
  - Layoff Notice Date: (calendar icon)
  - Override Last Date Worked: (checkbox)
  - Recall Eligibility Flag: (checkbox)
- Bottom Navigation:** Job Data, Employment Data, Earnings Distribution, Benefits Program Participation.
- Buttons:** Save (highlighted in red), Return to Search, Previous in List, Next in List, Notify, Refresh, Update/Display, Include History.

- After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.
- Click the **Save** button.

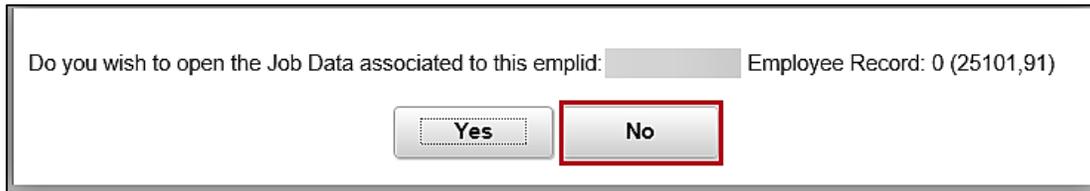
**ORP Retiree New Hire**

Next, if the retiree is eligible, the retiree is now hired into the ORP Retirement position using a new employment instance. This transaction is completed by an HR Administrator.

10. Navigate to the **New Employment Instance** page using the following path:

**Navigator > Workforce Administration > Personal Information > Organizational Relationship > New Employment Instance**

A **Confirmation** message displays.



Do you wish to open the Job Data associated to this emplid: [redacted] Employee Record: 0 (25101,91)

11. Click the **No** button.

The **New Employment Instance** page displays.



< Work Location **New Employment Instance**

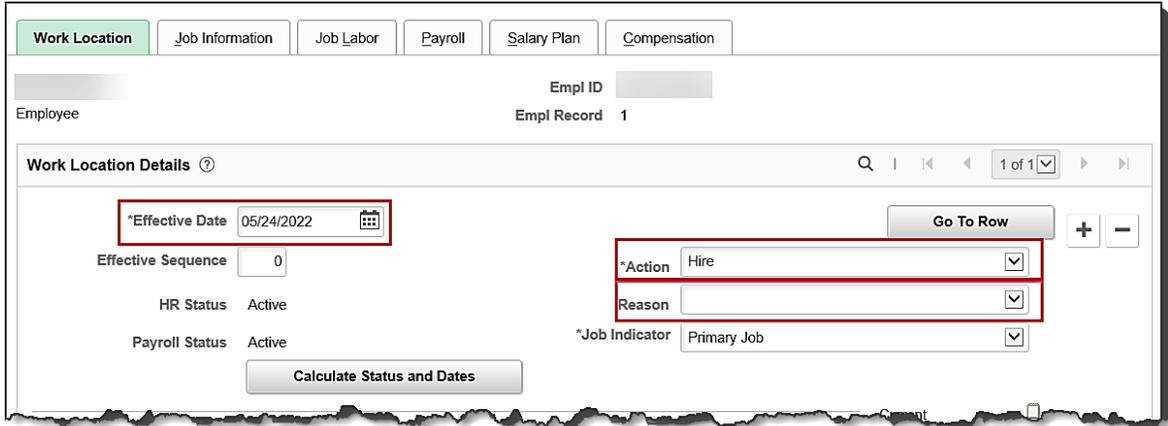
**New Employment Instance**

Empl ID [redacted]

Empl Record 1

12. Click the **Add Relationship** button to add job information for the new employee record.

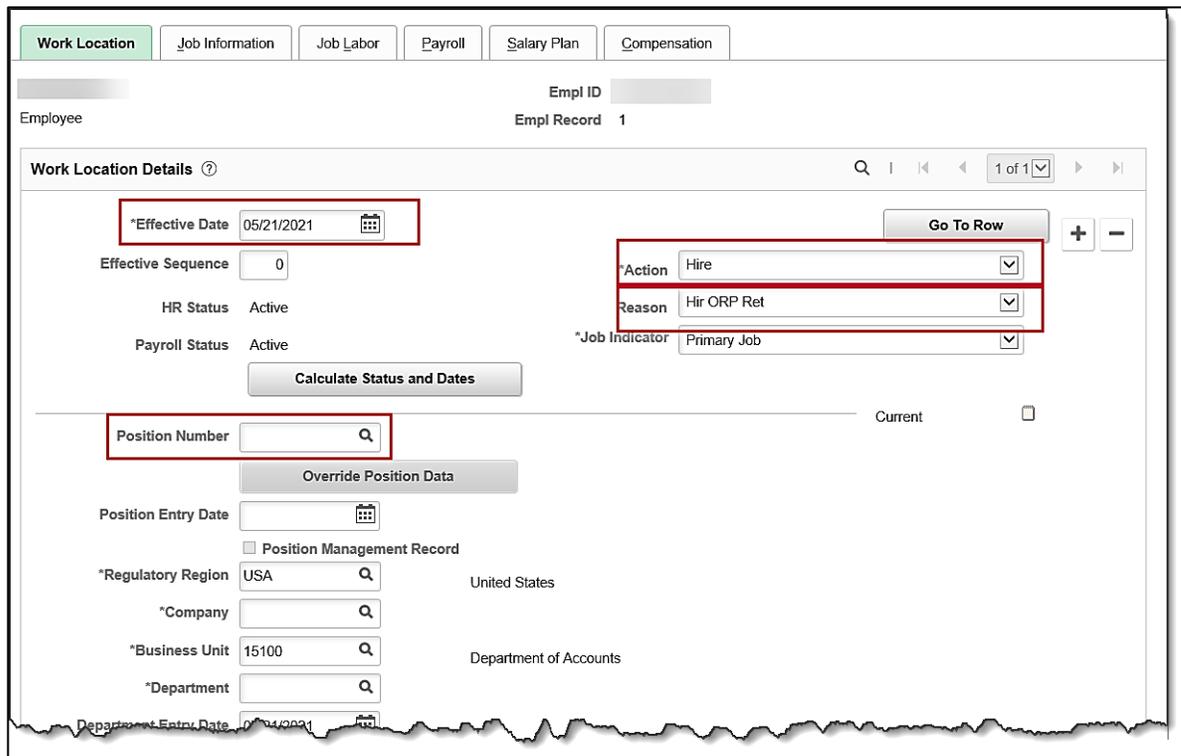
The **Job Data** page displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. The 'Effective Date' field is highlighted with a red box and contains the date 05/24/2022. The 'Action' field is highlighted with a red box and contains 'Hire'. The 'Reason' field is highlighted with a red box and is empty. The 'Job Indicator' is 'Primary Job'. The 'Effective Sequence' is 0, 'HR Status' is Active, and 'Payroll Status' is Active. A 'Calculate Status and Dates' button is visible below the fields.

13. The **Effective Date** field defaults to the current system date. Change the effective date as needed to be the same date of the retirement action completed previously using the **Calendar** icon.
14. Verify that the **Action** field populated by default to “Hire”.
15. Select the “Hir ORP Ret” list item using the **Reason** field dropdown button.

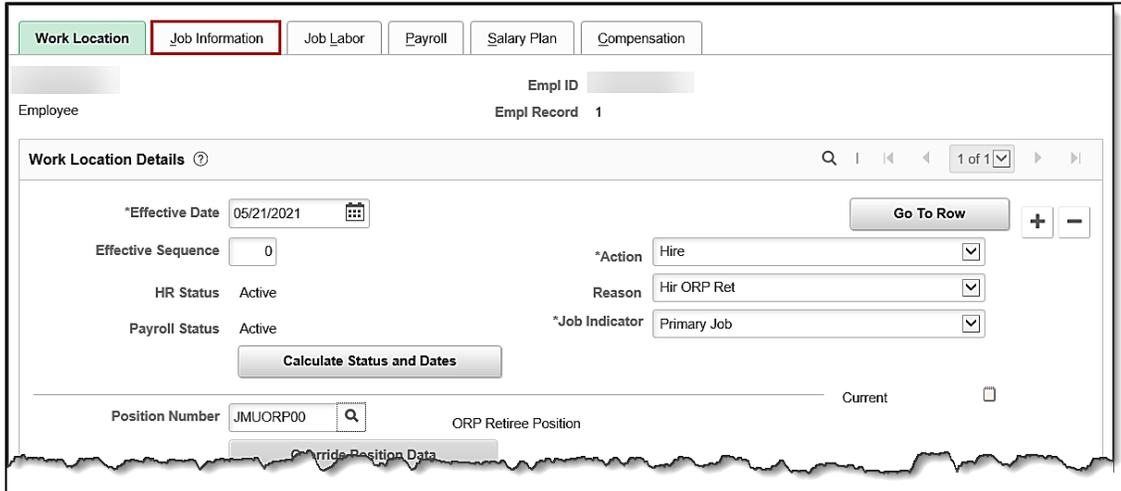
The **Work Location** tab refreshes with the selected effective date and reason.



The screenshot shows the 'Work Location' tab selected. The 'Effective Date' field is highlighted with a red box and contains the date 05/21/2021. The 'Action' field is highlighted with a red box and contains 'Hire'. The 'Reason' field is highlighted with a red box and contains 'Hir ORP Ret'. The 'Job Indicator' is 'Primary Job'. The 'Effective Sequence' is 0, 'HR Status' is Active, and 'Payroll Status' is Active. A 'Calculate Status and Dates' button is visible below the fields. Below the main form, there is a 'Position Number' field highlighted with a red box, an 'Override Position Data' button, and a 'Position Entry Date' field. Below these are several dropdown menus for 'Regulatory Region' (USA), 'Company', 'Business Unit' (15100), and 'Department'.

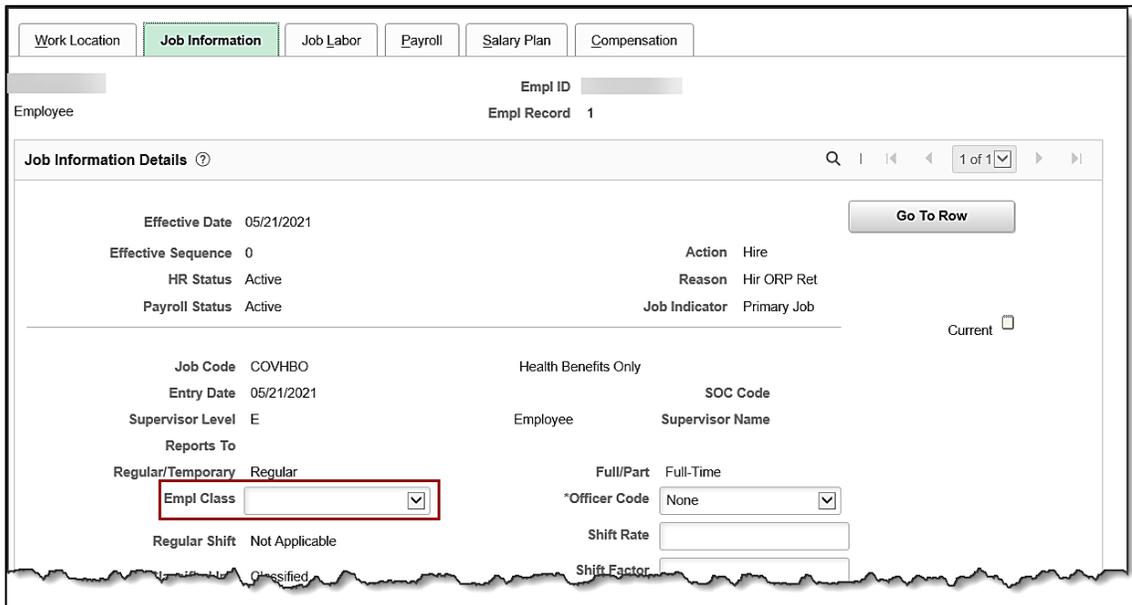
16. Search for or enter your agency’s ORP Retiree Position using the **Position Number** field.

The **Work Location** tab refreshes with the applicable Position Number.



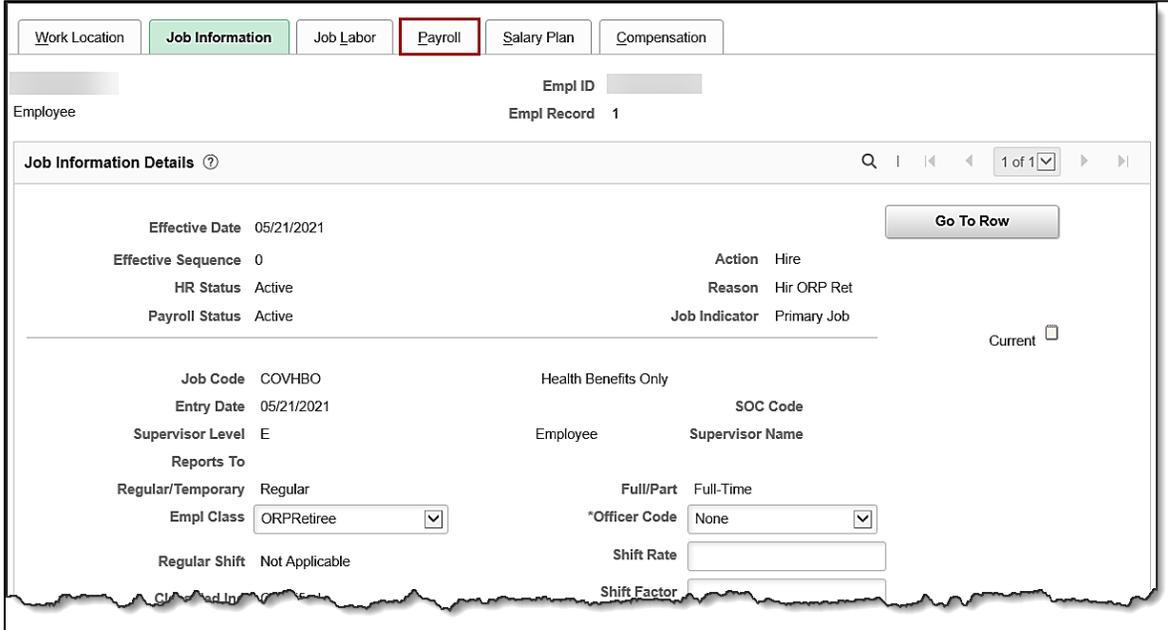
17. Click the **Job Information** tab.

The **Job Information** tab displays.



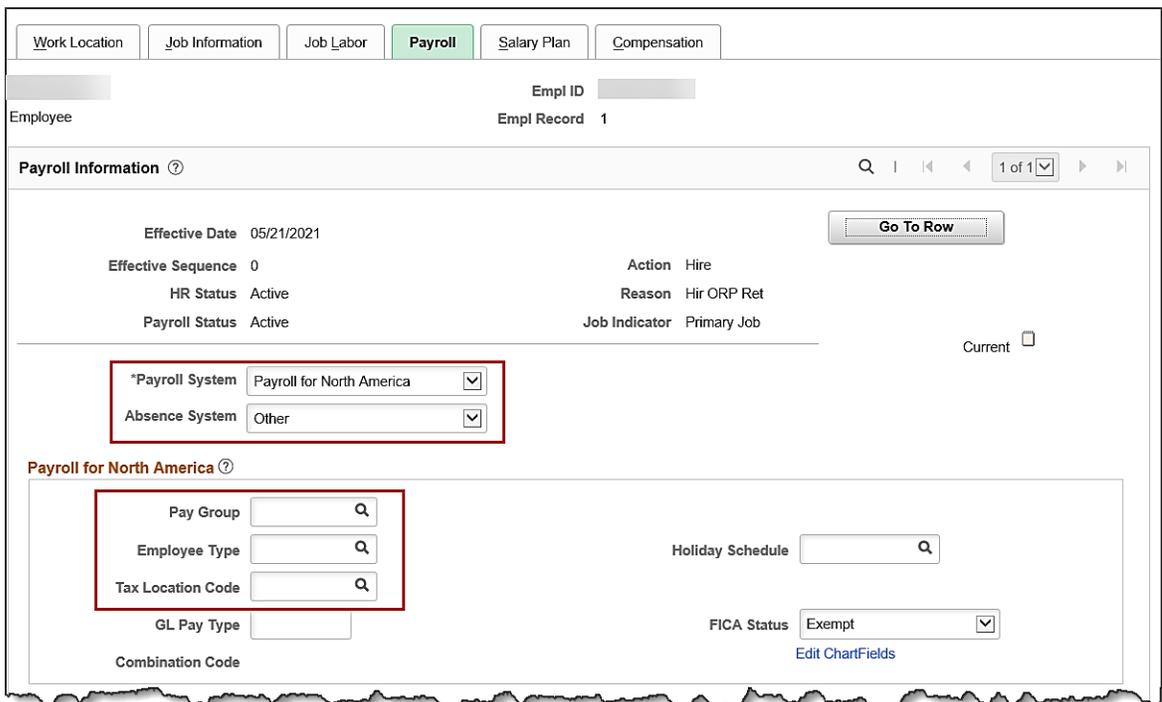
18. Select the “ORPRetiree” list item using the **Empl Class** field dropdown button.

The **Job Information** tab refreshes with the selected Employee Class.



19. Click the **Payroll** tab.

The **Payroll** tab displays.



20. The **Payroll System** field defaults to “Payroll for North America”. Do not change.

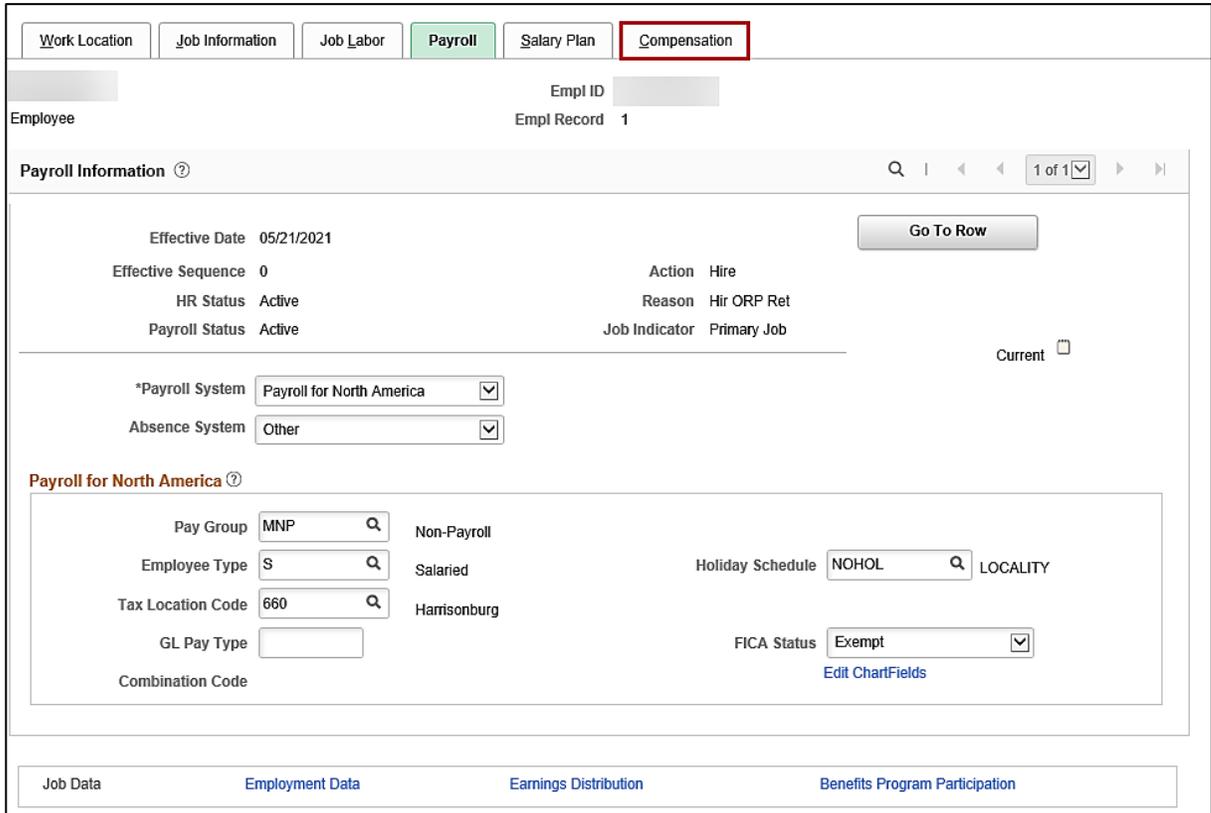
21. The **Absence System** field defaults to “Other”. Do not change.

22. Select the “MNP” list item using the **Pay Group Search and Select** icon (magnifying glass). This is the Non-Payroll Pay Group.

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23. Select the applicable tax location using the **Tax Location Code Search and Select** icon (magnifying glass).

The **Payroll** tab refreshes with the selected Pay Group and Tax Location Code.

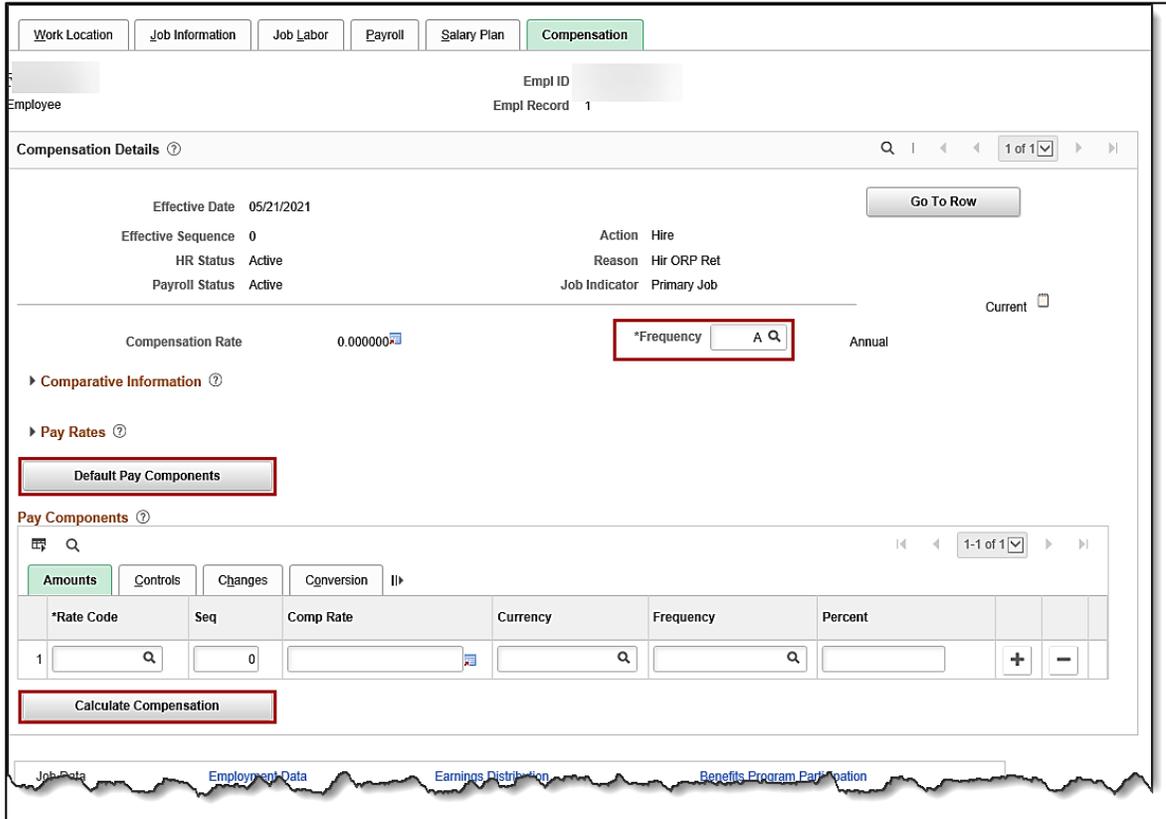


The screenshot shows the HR system interface with the following elements:

- Navigation Tabs:** Work Location, Job Information, Job Labor, **Payroll** (highlighted in green), Salary Plan, **Compensation** (highlighted in red).
- Employee Information:** Employee, Empl ID, Empl Record 1.
- Payroll Information:**
  - Effective Date: 05/21/2021
  - Effective Sequence: 0
  - HR Status: Active
  - Payroll Status: Active
  - Action: Hire
  - Reason: Hir ORP Ret
  - Job Indicator: Primary Job
  - Go To Row button
  - Current icon
- System Settings:**
  - \*Payroll System: Payroll for North America
  - Absence System: Other
- Payroll for North America:**
  - Pay Group: MNP (with magnifying glass icon) - Non-Payroll
  - Employee Type: S (with magnifying glass icon) - Salaried
  - Tax Location Code: 660 (with magnifying glass icon) - Harrisonburg
  - GL Pay Type: (empty field)
  - Holiday Schedule: NOHOL (with magnifying glass icon) - LOCALITY
  - FICA Status: Exempt
  - Edit ChartFields link
- Bottom Navigation:** Job Data, Employment Data, Earnings Distribution, Benefits Program Participation

24. Click the **Compensation** tab.

The **Compensation** tab displays.



The screenshot shows the 'Compensation' tab in a software application. The interface includes several sections:

- Navigation Tabs:** Work Location, Job Information, Job Labor, Payroll, Salary Plan, **Compensation**.
- Employee Information:** Employee ID, Empl ID, Empl Record 1.
- Compensation Details:**
  - Effective Date: 05/21/2021
  - Effective Sequence: 0
  - HR Status: Active
  - Payroll Status: Active
  - Action: Hire
  - Reason: Hir ORP Ret
  - Job Indicator: Primary Job
  - Compensation Rate: 0.000000
  - \*Frequency: A (highlighted with a red box and a magnifying glass icon)
  - Annual
- Buttons:** Go To Row, Default Pay Components (highlighted with a red box), Calculate Compensation (highlighted with a red box).
- Pay Components Table:**

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0					+	-
- Bottom Navigation:** Job Data, Employment Data, Earnings Distribution, Benefits Program Participation.

25. The **Frequency** field defaults to “A” for Annual. Update the pay frequency to “M” Monthly using the **Frequency Search and Select** icon (magnifying glass).
26. Click the **Defaults Pay Components** button.
 

**Note:** The Compensation Rate should be “0”. No additional **Pay Component** fields should be entered.
27. Click the **Calculate Compensation** button.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee Empl ID  

Empl Record 1

**Compensation Details** 1 of 1

Effective Date 05/21/2021

Effective Sequence 0

HR Status Active

Payroll Status Active

Action Hire

Reason Hir ORP Ret

Job Indicator Primary Job

Go To Row

Current

Compensation Rate 0.000000 \*Frequency M Monthly

▶ **Comparative Information**

▶ **Pay Rates**

Default Pay Components

**Pay Components**

1-1 of 1

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	+	-
1	0					+	-

Calculate Compensation

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

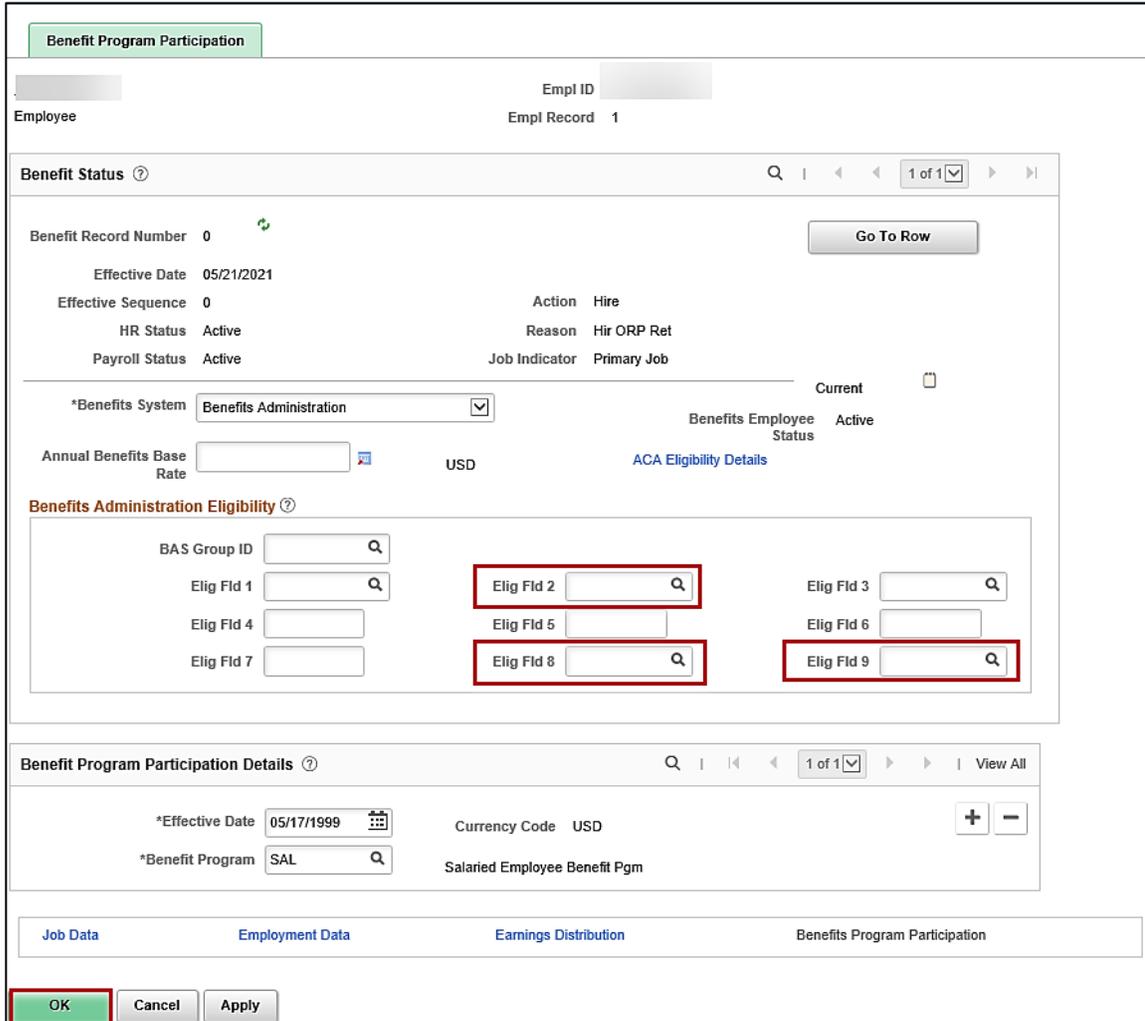
Save
Return to Search
Previous in List
Next in List
Notify
Refresh

Update/Display
Include History
Correct History

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

28. Click the **Benefits Program Participation** link.

The **Benefit Program Participation** page displays.



**Benefit Program Participation**

Employee [Redacted] Empl ID [Redacted]  
Empl Record 1

**Benefit Status** 1 of 1

Benefit Record Number 0 [Go To Row](#)

Effective Date 05/21/2021  
Effective Sequence 0  
HR Status Active  
Payroll Status Active

Action Hire  
Reason Hir ORP Ret  
Job Indicator Primary Job

\*Benefits System Benefits Administration [ACA Eligibility Details](#)

Annual Benefits Base Rate [Redacted] USD

**Benefits Administration Eligibility**

BAS Group ID [Redacted]

Elig Fld 1 [Redacted]

Elig Fld 2 [Redacted]

Elig Fld 3 [Redacted]

Elig Fld 4 [Redacted]

Elig Fld 5 [Redacted]

Elig Fld 6 [Redacted]

Elig Fld 7 [Redacted]

Elig Fld 8 [Redacted]

Elig Fld 9 [Redacted]

**Benefit Program Participation Details** 1 of 1 [View All](#)

\*Effective Date 05/17/1999  Currency Code USD

\*Benefit Program SAL  Salaried Employee Benefit Pgm

[Job Data](#) [Employment Data](#) [Earnings Distribution](#) [Benefits Program Participation](#)

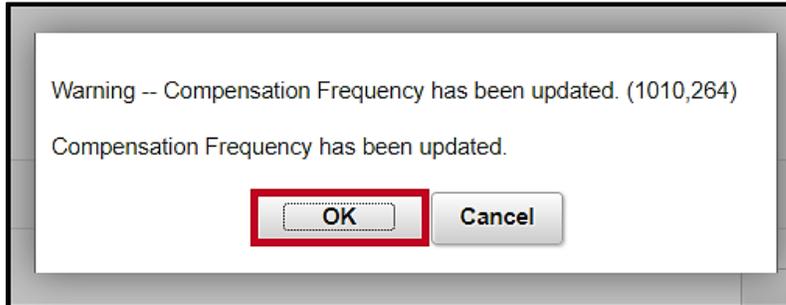
**Note:** Use the **Configuration Workbook** to complete **Eligibility Fields 2, 8, and 9** based on the appropriate scenarios for the retiree.

29. Select the applicable value for the **Eligibility 2** field using the **Search and Select** icon (magnifying glass).

**Note:** If the retiree is selecting to decline medical coverage permanently, select the value of “999999999”. If the retiree is selecting medical coverage, select the value of “007108000”.

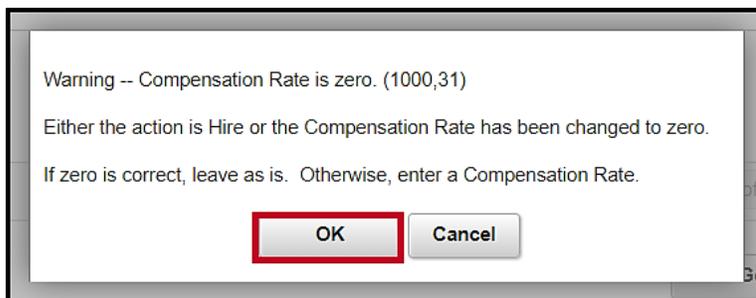
30. Select the applicable value for the **Eligibility 8** field using the **Search and Select** icon (magnifying glass). Example: “12-12”.
31. Select the applicable value for the **Eligibility 9** field using the **Search and Select** icon (magnifying glass). Example: “RR-DB”.
32. Click the **OK** button.

The following warning displays in a pop-up window.



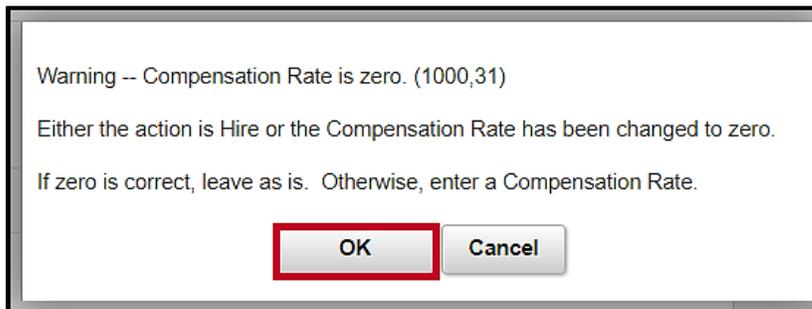
33. Click the **OK** button.

The following warning displays in a pop-up window.



34. Click the **OK** button.

The following warning displays in a pop-up window.



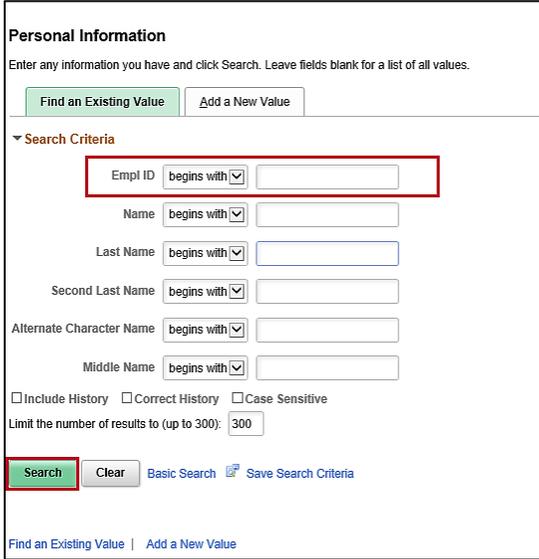
35. Click the **OK** button.

Update the retiree's email address to a personal email address by completing the following steps:

36. Navigate to the **Modify a Person** page using the following path:

**Navigator > Workforce Administration > Personal Information > Modify a Person**

The **Personal Information Search** page displays.



**Personal Information**  
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**

Empl ID  begins with

Name  begins with

Last Name  begins with

Second Last Name  begins with

Alternate Character Name  begins with

Middle Name  begins with

Include History  Correct History  Case Sensitive

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

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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

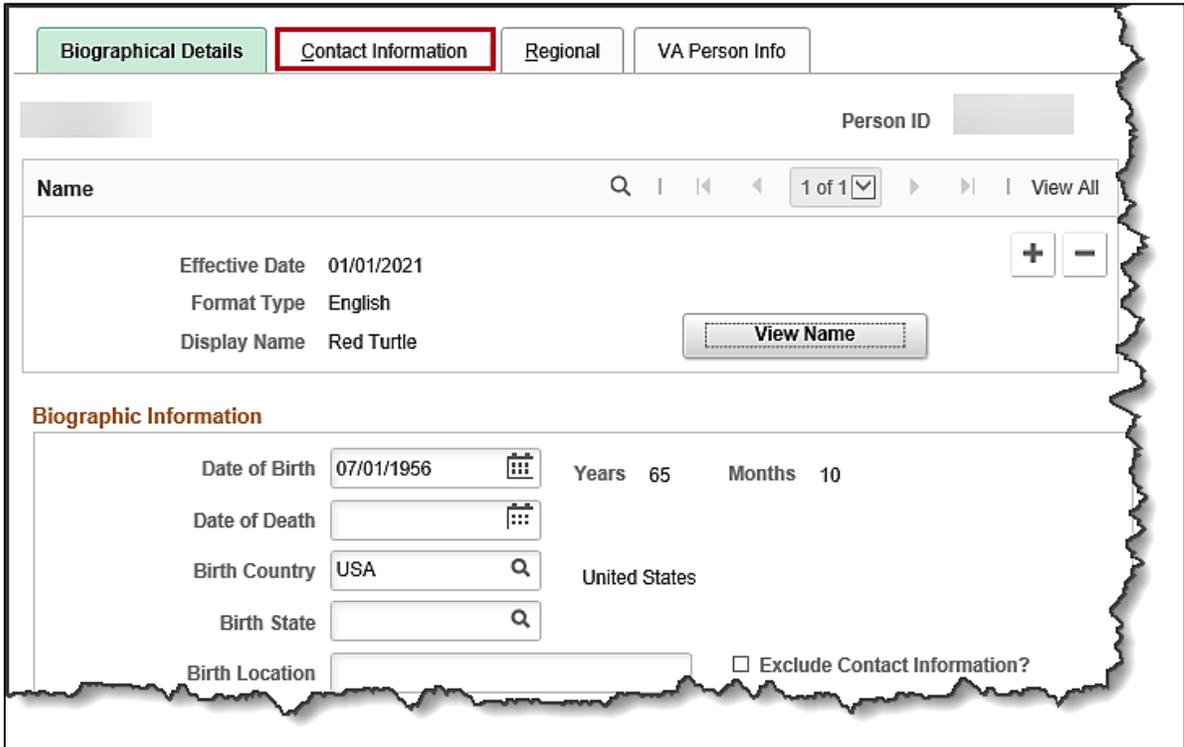
37. Search for the applicable retiree (employee) by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/retiree.

38. Click the **Search** button.

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The **Personal Information** page displays with the **Biographical Details** tab displayed by default.



The screenshot shows a web interface with four tabs: **Biographical Details**, **Contact Information** (highlighted with a red border), **Regional**, and **VA Person Info**. Below the tabs is a search bar with a magnifying glass icon and a dropdown menu showing "1 of 1". To the right of the search bar is a "Person ID" field. Below the search bar is a table with the following data:

Effective Date	01/01/2021	<input type="button" value="+"/>	<input type="button" value="-"/>
Format Type	English		
Display Name	Red Turtle	<input type="button" value="View Name"/>	

Below the table is a section titled **Biographic Information** with the following fields:

- Date of Birth: 07/01/1956 (with a calendar icon)
- Years: 65
- Months: 10
- Date of Death: (with a calendar icon)
- Birth Country: USA (with a search icon)
- United States
- Birth State: (with a search icon)
- Birth Location: (with a search icon)
- Exclude Contact Information?

37. Click the **Contact Information** tab.

The **Contact Information** tab displays.

Biographical Details
Contact Information
Regional
VA Person Info

Empl ID

**Current Addresses**

🔍
1-1 of 1
View All

Address Type	As Of Date	Status	Address		
Home	09/25/2010	A	100 MAIN ST RICHMOND, VA 22834-2300 Rockingham	<a href="#">View Address Detail</a>	+ -

**Phone Information**

🔍
1-2 of 2
View All

*Phone Type	Telephone	Extension	Preferred		
Business	555/555-5555		<input checked="" type="checkbox"/>	+ -	
Home	555/555-5555		<input type="checkbox"/>	+ -	

**Email Option Selection**

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

**Email Addresses**

*Email Type	*Email Address	Preferred		
Business	noemail@virginia.gov	<input checked="" type="checkbox"/>	+ -	

**Instant Message IDs**

🔍
1-1 of 1
View All

*IM Protocol	*IM Domain	*Network ID	Preferred		
			<input type="checkbox"/>	+ -	

Save
Return to Search
Previous in List
Next in List
Notify
Refresh
Add
Update/Display
Include History
Correct History

[Biographical Details](#) | 
 [Contact Information](#) | 
 [Regional](#) | 
 [VA Person Info](#)

38. Within the **Email Option Selection** section, click the **Employee Provided Email** radio button.
  39. Within the **Email Addresses** section, change the existing email type to “Personal” using the **Email Type** field dropdown button.
  40. Enter the retiree’s personal email address (provided by the retiree) in the **Email Address** field.
- Note:** This email address will be what is used when registering for access to Cardinal. It is important for this to be populated with the personal email address provided by the retiree.
41. Click the **Save** button.

To run the Employee Activity Report for the retiree, use the following navigation path:

**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**

42. Run/print the Employee Activity Report for the retiree and insert into your paper file as needed.

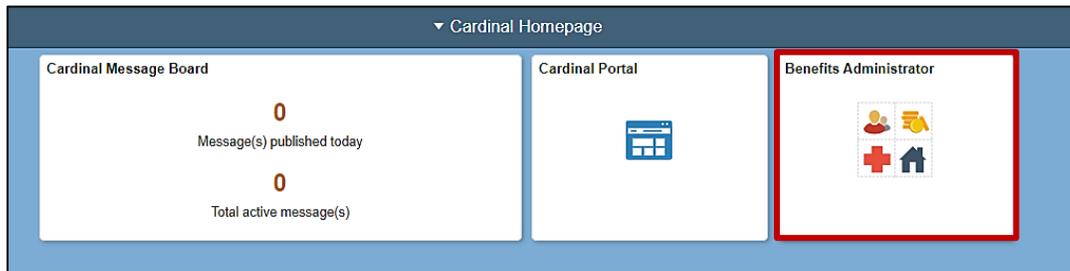
**Note:** Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

**Enroll ORP Retiree into Non-Medicare Medical Plan**

Next, enroll the retiree into a Non-Medicare Medical Plan. This transaction is completed by a BN Administrator **after** the Ben Admin process runs (every 4 hours).

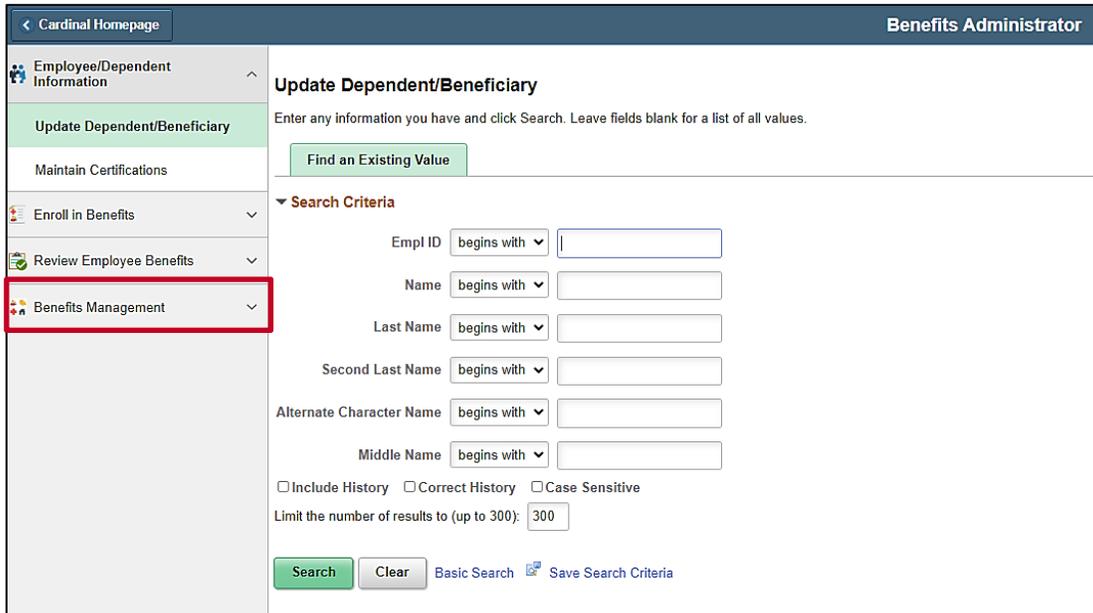
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



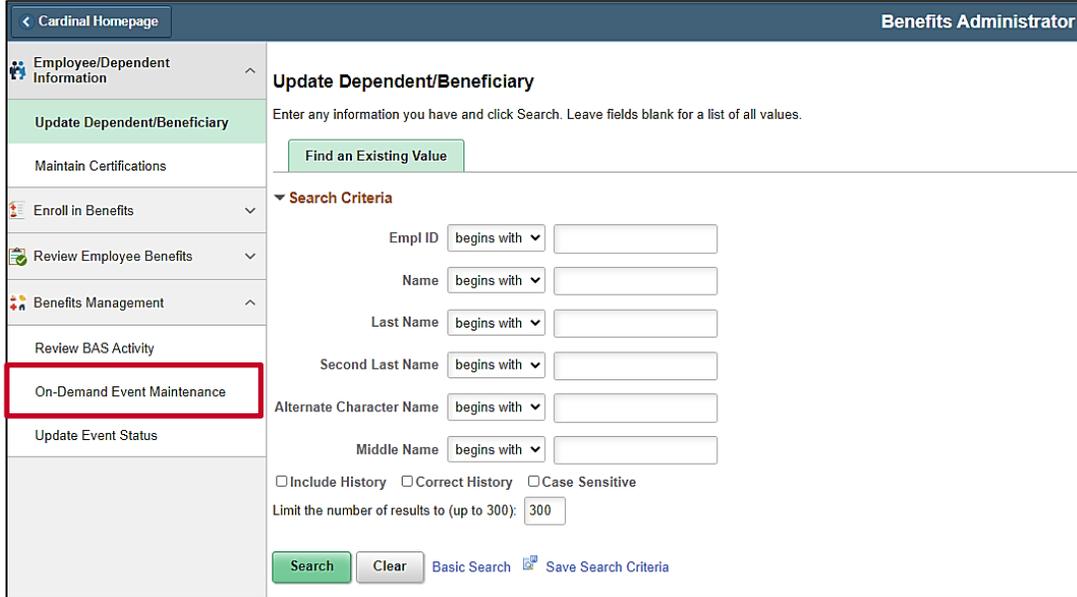
2. Click the **Benefits Administrator** tile.

The **Update Dependent/Beneficiary Search** page displays.

A screenshot of the "Update Dependent/Beneficiary" search page. The page has a dark blue header with "Cardinal Homepage" on the left and "Benefits Administrator" on the right. On the left side, there is a navigation menu with items: "Employee/Dependent Information", "Update Dependent/Beneficiary", "Maintain Certifications", "Enroll in Benefits", "Review Employee Benefits", and "Benefits Management" (highlighted with a red box). The main content area is titled "Update Dependent/Beneficiary" and contains a search form. The form includes a "Find an Existing Value" button, a "Search Criteria" section with dropdown menus for "Empl ID", "Name", "Last Name", "Second Last Name", "Alternate Character Name", and "Middle Name", each followed by a text input field. Below the search criteria are checkboxes for "Include History", "Correct History", and "Case Sensitive". There is also a "Limit the number of results to (up to 300):" field with the value "300". At the bottom, there are "Search" and "Clear" buttons, and links for "Basic Search" and "Save Search Criteria".

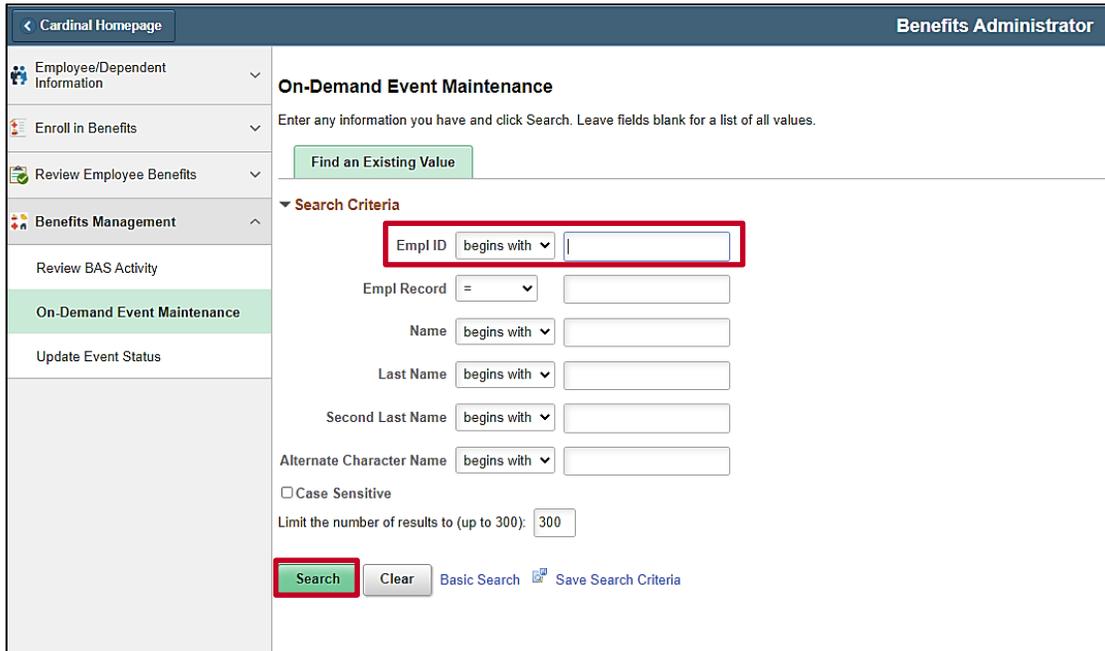
3. Click the **Benefits Management** menu item on the left-hand side of the screen.

The **Benefits Management** menu expands.



- Click the **On-Demand Event Maintenance** menu list item.

The **On-Demand Event Maintenance Search** page displays.



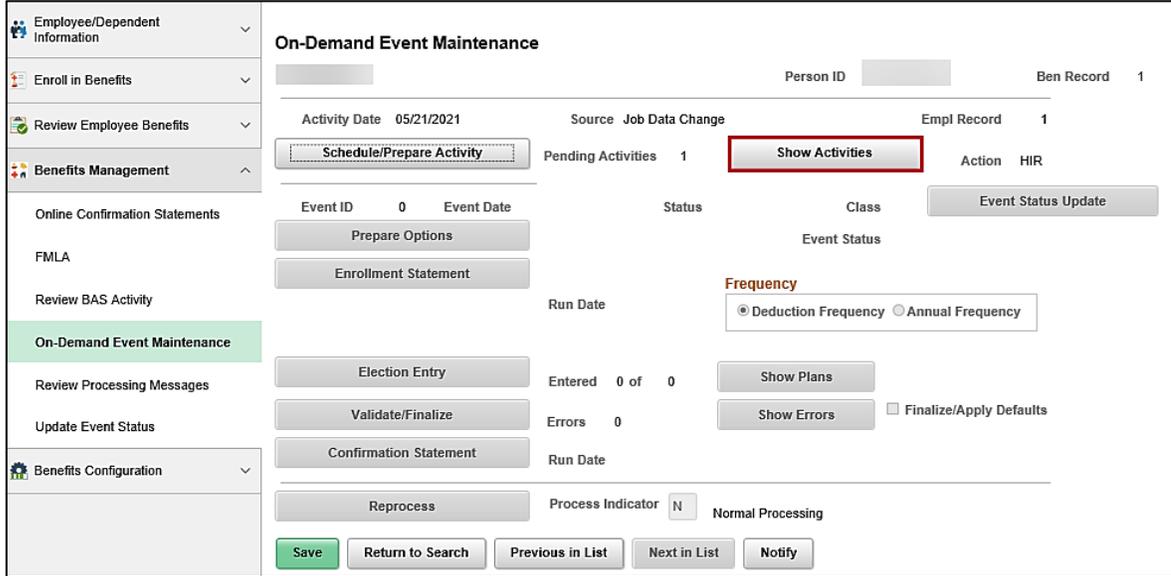
- Search for the applicable retiree (employee) by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/retiree.

- Click the **Search** button.

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The **On-Demand Event Maintenance** page displays for the applicable retiree.



**On-Demand Event Maintenance**

Person ID [redacted] Ben Record 1

Activity Date 05/21/2021 Source Job Data Change Empl Record 1

Pending Activities 1  Action HIR

Event ID 0 Event Date [redacted] Status [redacted] Class [redacted]

Event Status [redacted]

Run Date [redacted] **Frequency**

Deduction Frequency  Annual Frequency

Entered 0 of 0

Errors 0   Finalize/Apply Defaults

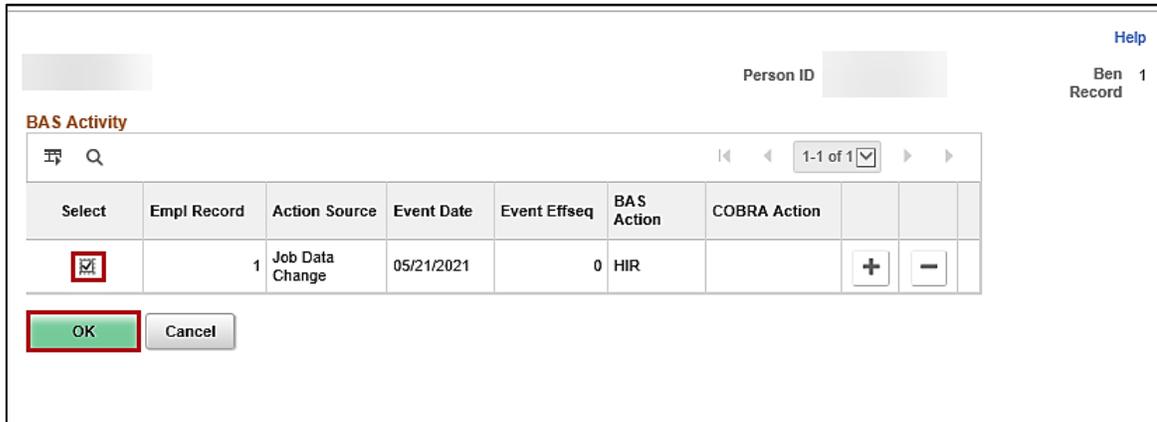
Run Date [redacted]

Process Indicator N Normal Processing

**Note:** If the **On-Demand Event Maintenance** page does not display, select Empl Record 1 (or higher) on the **On-Demand Event Maintenance Search** page.

- Click the **Show Activities** button.

The **Show Activities** page displays in a pop-up window.



Person ID [redacted] Ben Record 1

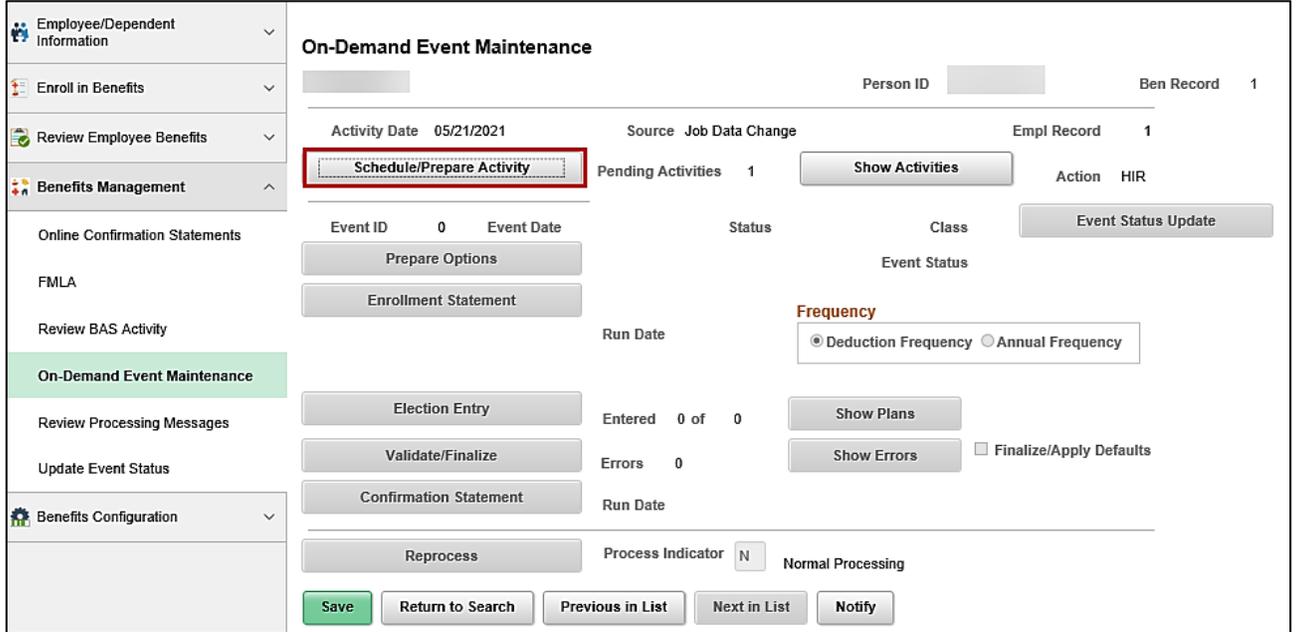
**BAS Activity**

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
<input checked="" type="checkbox"/>	1	Job Data Change	05/21/2021	0	HIR		<input type="button" value="+"/>	<input type="button" value="-"/>

- Confirm that the Job Data Change event (**Action Source** field) **Select** checkbox option for the HIR action (**BAS Action** field) is checked in the **BAS Activity** table.
- Click the **OK** button.

The **On-Demand Event Maintenance** page returns.

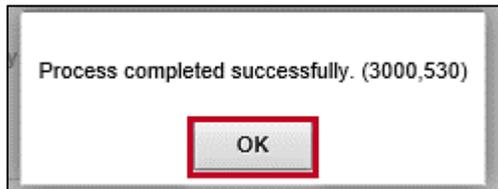


The screenshot shows the 'On-Demand Event Maintenance' page. On the left is a navigation menu with options like 'Employee/Dependent Information', 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', 'Online Confirmation Statements', 'FMLA', 'Review BAS Activity', 'On-Demand Event Maintenance' (highlighted), 'Review Processing Messages', 'Update Event Status', and 'Benefits Configuration'. The main content area displays 'On-Demand Event Maintenance' with fields for 'Activity Date' (05/21/2021), 'Source' (Job Data Change), and 'Empl Record' (1). A 'Schedule/Prepare Activity' button is highlighted with a red box. Other buttons include 'Show Activities', 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Election Entry', 'Validate/Finalize', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. There are also status indicators for 'Pending Activities' (1), 'Entered' (0 of 0), and 'Errors' (0).

10. Click the **Schedule/Prepare Activity** button to initiate the automated programming process that schedules and prepares pending activity.

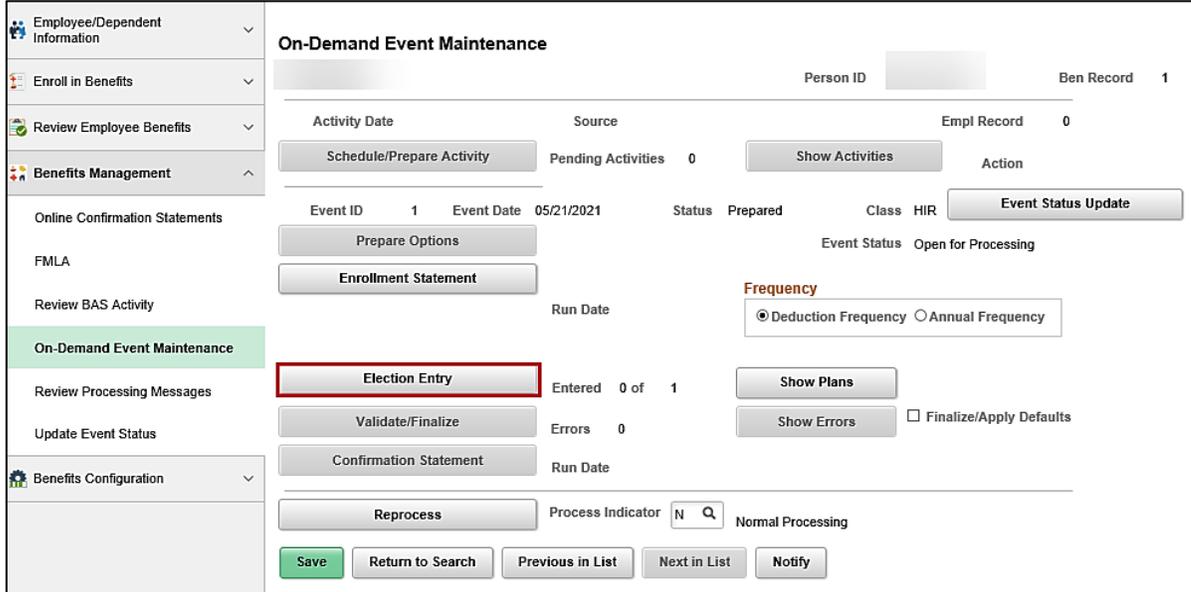
**Note:** If the **Schedule/Prepare Activity** button is already greyed out, proceed to Step 12.

The following **Confirmation** message displays in a pop-up window when the process has completed successfully.



11. Click the **OK** button.

The **On-Demand Event Maintenance** page refreshes.



**On-Demand Event Maintenance**

Person ID [redacted] Ben Record 1

Activity Date [redacted] Source [redacted] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 05/21/2021 Status Prepared Class HIR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement

Run Date Frequency

Deduction Frequency  Annual Frequency

**Election Entry** Entered 0 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

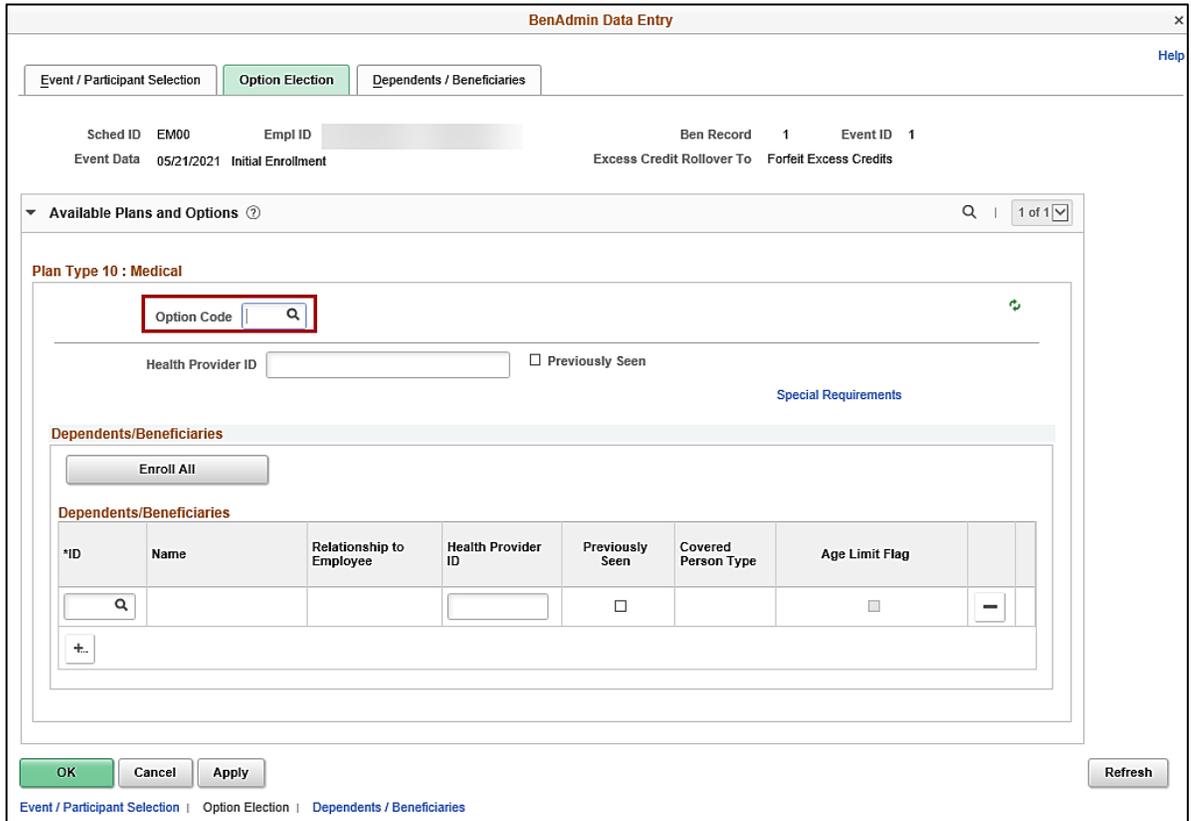
Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Previous in List Next in List Notify

12. Click the **Election Entry** button.

The **Election Entry** page displays with the **Option Election** tab displayed by default.



**BenAdmin Data Entry**

Event / Participant Selection **Option Election** Dependents / Beneficiaries

Sched ID EM00 Empl ID [redacted] Ben Record 1 Event ID 1

Event Data 05/21/2021 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

**Plan Type 10 : Medical**

**Option Code Search and Select**

Health Provider ID   Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

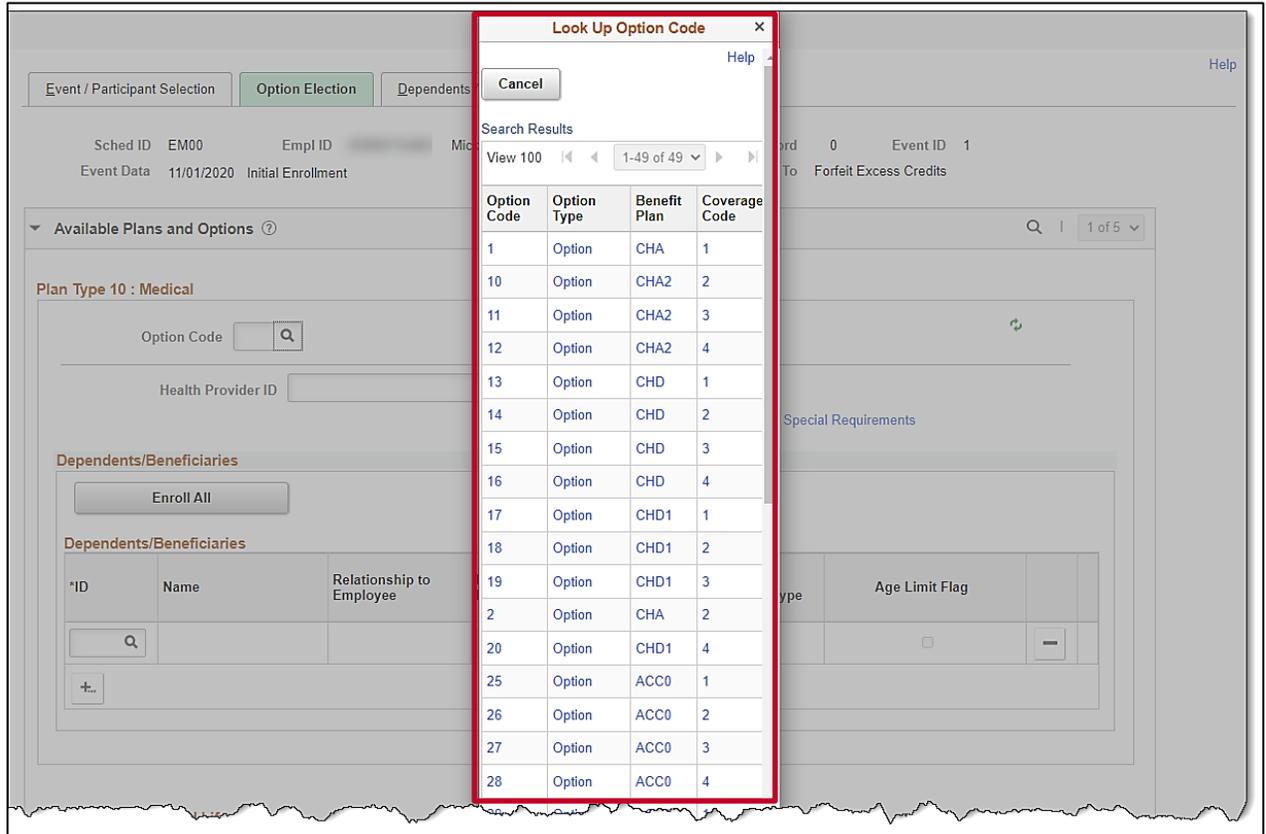
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

13. Within the **Plan Type 10: Medical** section, click the **Option Code Search and Select** icon (magnifying glass).

The **Look Up Option Code** page displays in a pop-up window.



14. Select the Benefit Plan and Coverage Code indicated on the enrollment form submitted by the retiree.

**Note:** The coverage codes are: 1 – Single Coverage, 2 – Employee + Spouse, 3 – Employee + Child, and 4 – Employee + 2 or More Dependents (Family).

The **Election Entry** page returns.

BenAdmin Data Entry

Help

Event / Participant Selection
Option Election
Dependents / Beneficiaries

Sched ID EM00    Empl ID      Ben Record 1    Event ID 1  
 Event Data 05/21/2021 Initial Enrollment    Excess Credit Rollover To    Forfeit Excess Credits

Available Plans and Options 1 of 1

**Plan Type 10 : Medical**

Option Code  COVA Care + Expanded Dental (ACC2) (Self + Spouse)

Health Provider ID   Previously Seen

Special Requirements

**Dependents/Beneficiaries**

Enroll All

**Dependents/Beneficiaries**

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
Q			<input style="width: 50px;" type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	-
<input style="width: 20px;" type="button" value="±"/>							

OK
Cancel
Apply

Refresh

Event / Participant Selection | 
 Option Election | 
 Dependents / Beneficiaries

15. Click the **Enroll All** button.

The retiree's spouse displays in the **Dependents/Beneficiaries** table.

BenAdmin Data Entry x

Help

---

Event / Participant Selection
Option Election
Dependents / Beneficiaries

---

Sched ID EM00    Empl ID [REDACTED]    Ben Record 1    Event ID 1  
Event Data 05/21/2021 Initial Enrollment    Excess Credit Rollover To    Forfeit Excess Credits

---

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 34    COVA Care + Expanded Dental (ACC2) (Self + Spouse)

---

Health Provider ID     Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
02	Faster Runner	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>	-

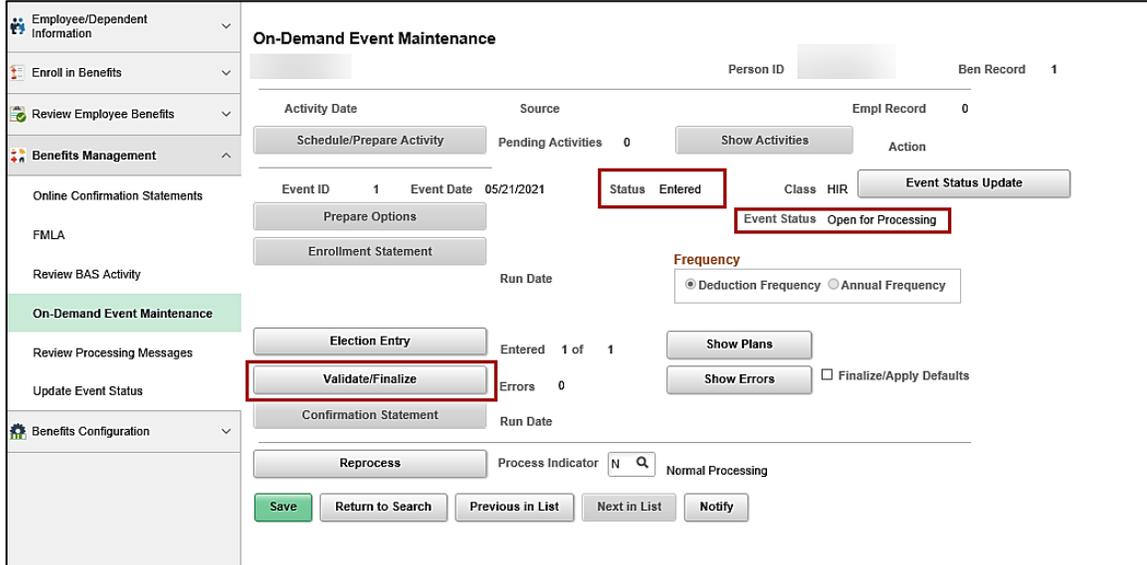
+

OK
Cancel
Apply
Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

16. Click the **OK** button.

The **On-Demand Event Maintenance** page returns.

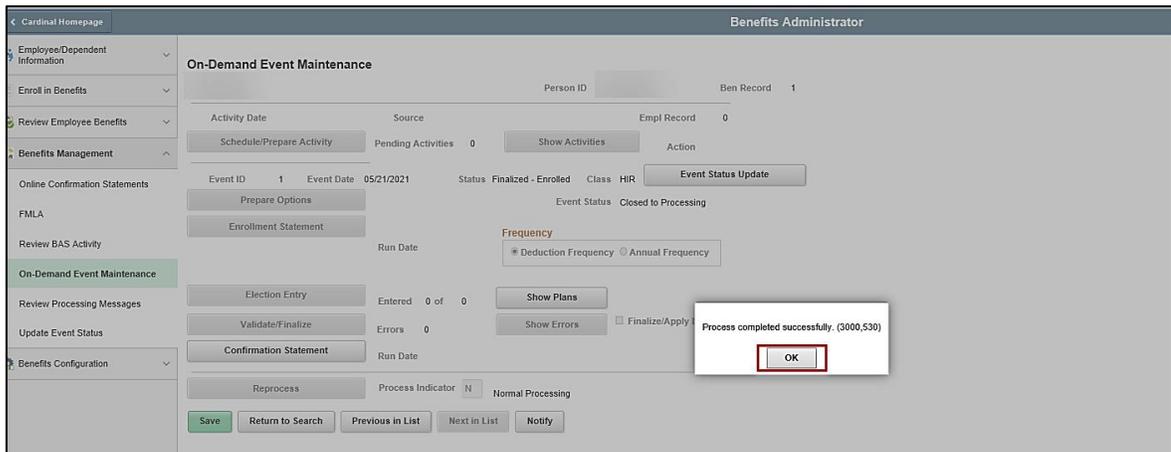


The screenshot shows the 'On-Demand Event Maintenance' page. The left sidebar contains navigation options like 'Employee/Dependent Information', 'Enroll in Benefits', 'Review Employee Benefits', and 'Benefits Management'. The main content area displays event details for Event ID 1 on 05/21/2021. The 'Status' is 'Entered' and 'Event Status' is 'Open for Processing'. A red box highlights the 'Validate/Finalize' button. Other buttons include 'Schedule/Prepare Activity', 'Show Activities', 'Event Status Update', 'Election Entry', 'Confirmation Statement', 'Reprocess', 'Save', 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'.

17. Confirm that the **Status** field is “Entered” and that the **Event Status** field is “Open for Processing”.
18. Click the **Validate/Finalize** button to validate the elections, close the event, and update the Base Benefits Tables.

**Note:** Once the event has been finalized, you will receive a message indicating that the process has completed successfully.

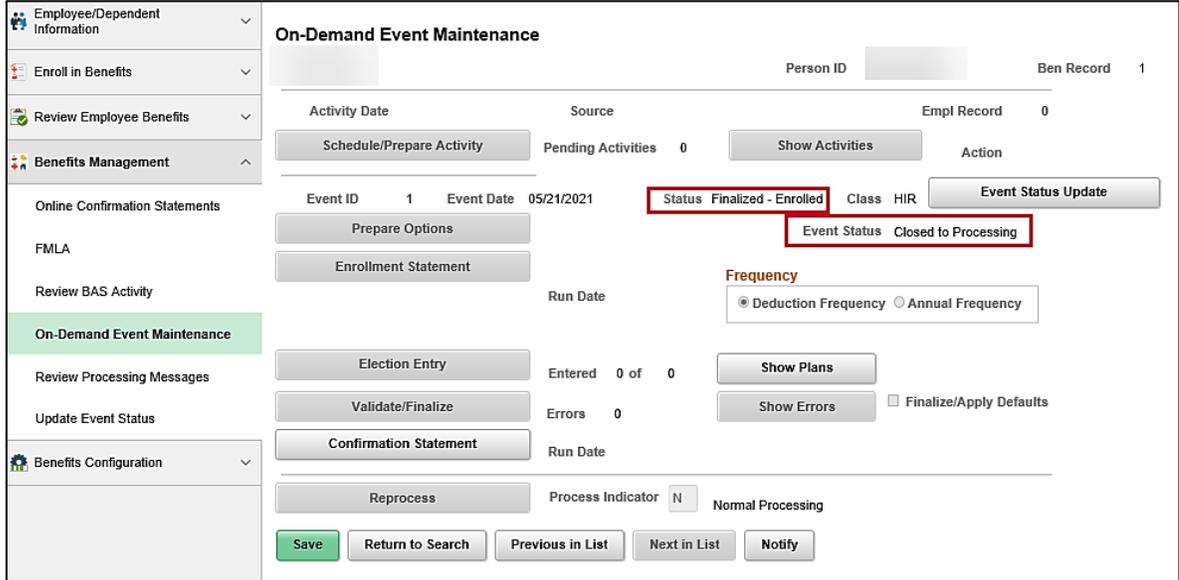
The page refreshes and the process confirmation message displays in a pop-up window.



The screenshot shows the 'On-Demand Event Maintenance' page after the 'Validate/Finalize' button was clicked. The 'Status' is now 'Finalized - Enrolled' and 'Event Status' is 'Closed to Processing'. A pop-up window displays the message 'Process completed successfully. (3000,530)' with an 'OK' button highlighted by a red box. The 'Validate/Finalize' button is now disabled.

19. Click the **OK** button.

The **On-Demand Event Maintenance** page returns.



**On-Demand Event Maintenance**

Person ID [ ] Ben Record 1

Activity Date [ ] Source [ ] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 05/21/2021 Status Finalized - Enrolled Class HIR Event Status Update

Prepare Options Event Status Closed to Processing

Enrollment Statement

Frequency  
 Deduction Frequency  Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

Confirmation Statement Run Date [ ]

Reprocess Process Indicator N Normal Processing

Save Return to Search Previous in List Next in List Notify

- Confirm that the **Status** field is “Finalized – Enrolled” and the **Event Status** field is “Closed to Processing”.

This process is now complete.

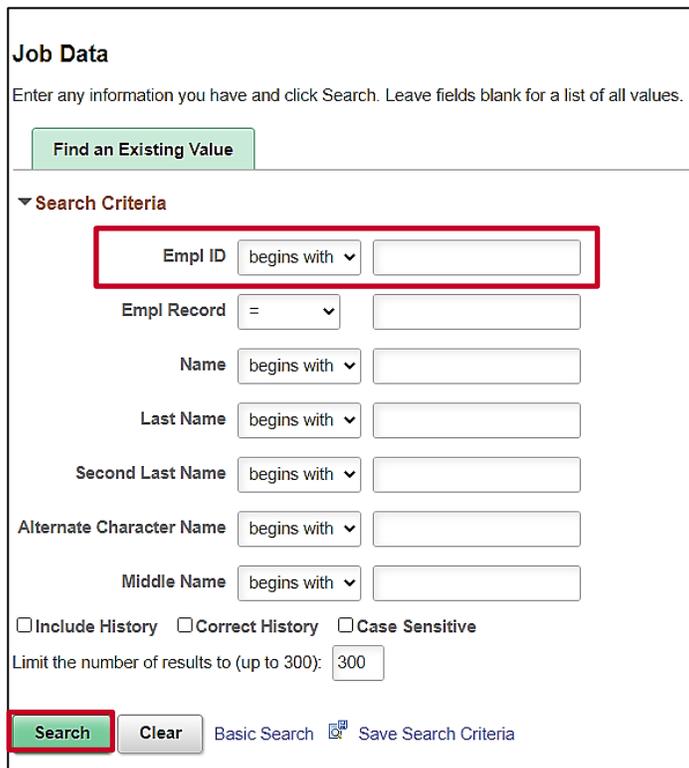
**Scenario 2****Retirement Process**

First, the employee must be retired. This transaction is completed by an HR Administrator.

1. Navigate to the **Job Data** page using the following path:

**Navigator > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.



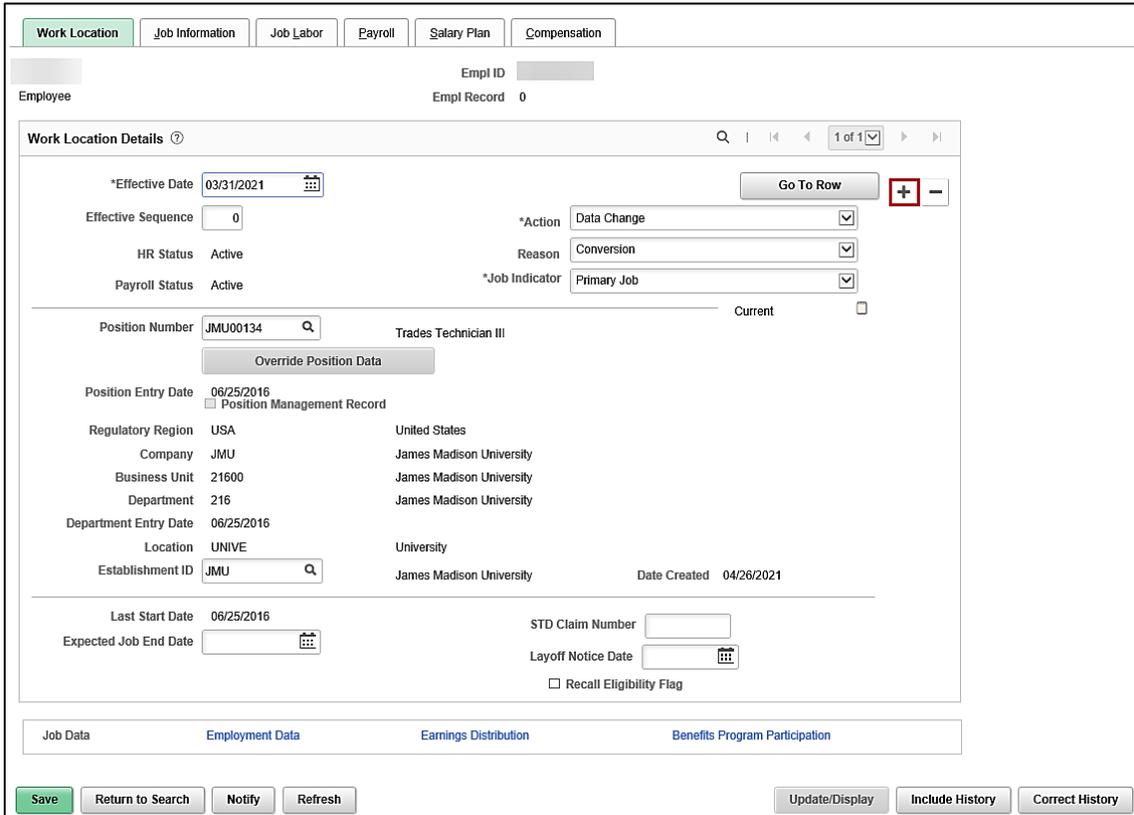
2. Search for the applicable employee by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.

3. Click the **Search** button.

**BN361\_ORP Retiree Guide**

The **Job Data** page for the applicable employee displays with the **Work Location** tab displayed by default.



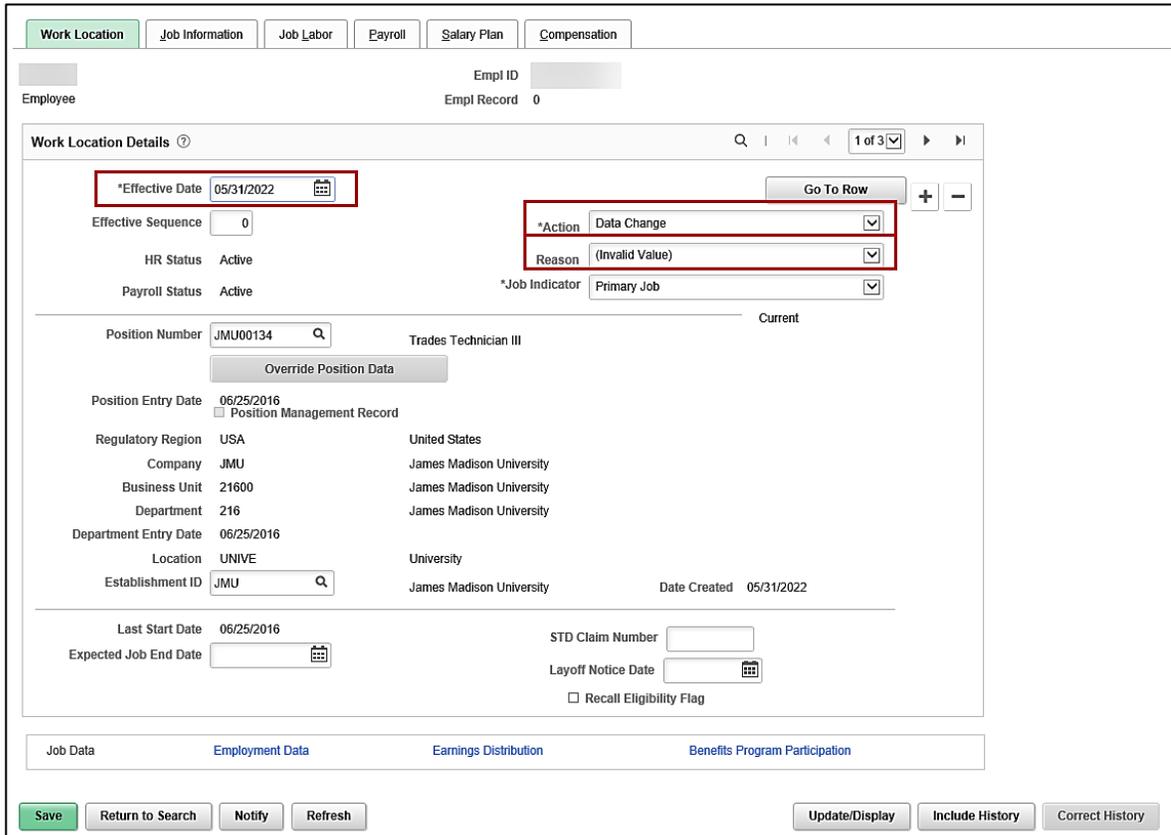
The screenshot shows the 'Work Location Details' form with the following fields and values:

- Effective Date:** 03/31/2021
- Effective Sequence:** 0
- HR Status:** Active
- Payroll Status:** Active
- Position Number:** JMU00134
- Position Title:** Trades Technician III
- Position Entry Date:** 06/25/2016
- Regulatory Region:** USA
- Company:** JMU
- Business Unit:** 21600
- Department:** 216
- Department Entry Date:** 06/25/2016
- Location:** UNIVE
- Establishment ID:** JMU
- Last Start Date:** 06/25/2016
- Expected Job End Date:** (empty)
- \*Action:** Data Change
- Reason:** Conversion
- \*Job Indicator:** Primary Job
- Current:**
- STD Claim Number:** (empty)
- Layoff Notice Date:** (empty)
- Recall Eligibility Flag:**

The 'Go To Row' button with a plus sign icon is highlighted with a red box.

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

The **Work Location** tab refreshes with a new effective dated row displayed.



The screenshot shows the 'Work Location' tab in the Cardinal HR system. The 'Effective Date' field is highlighted with a red box and contains the date '05/31/2022'. The '\*Action' dropdown menu is also highlighted with a red box and is set to 'Data Change'. The '\*Reason' dropdown menu is highlighted with a red box and is set to '(Invalid Value)'. Other fields include Position Number 'JMU00134', Position 'Trades Technician III', and various organizational details for James Madison University.

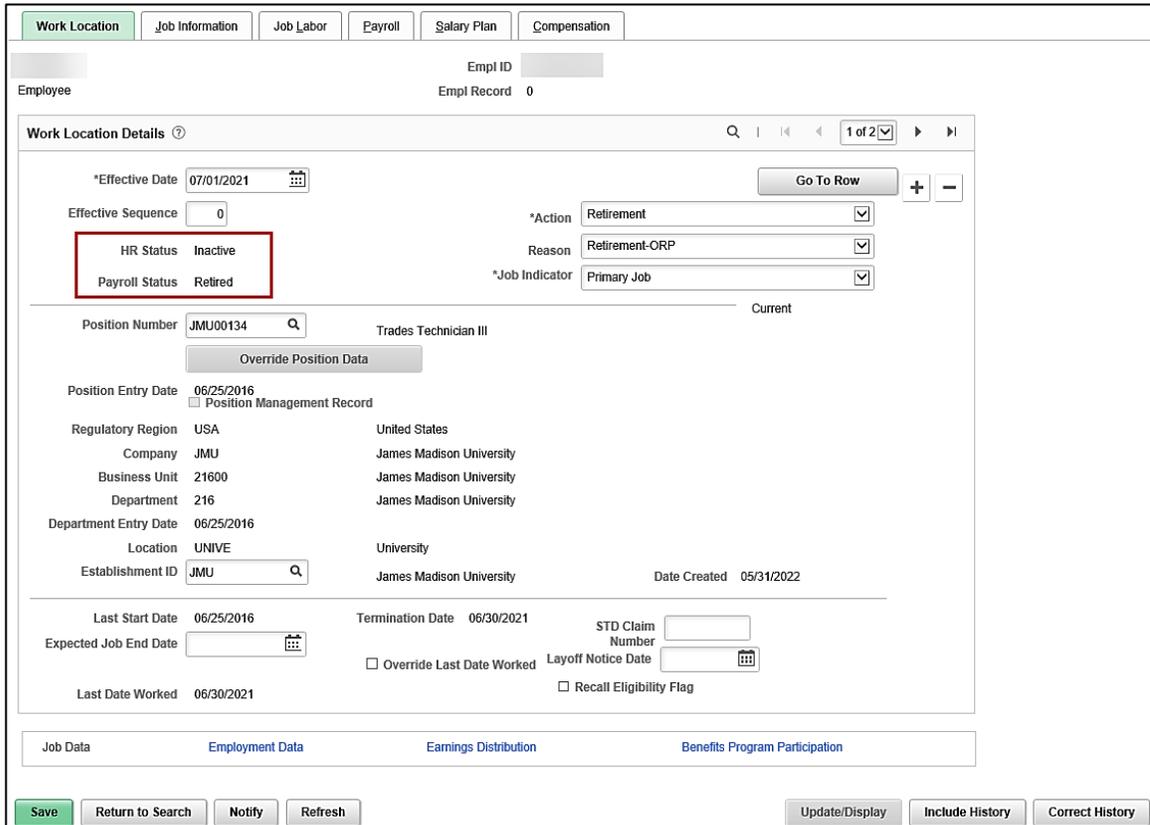
**Note:** When adding a new effective dated row, Cardinal copies the data from the previous row to reduce the amount of data entry required.

8. The **Effective Date** field defaults to the current system date. Update this date as needed using the **Calendar** icon.
9. **Note:** Set the effective date to be one day after the employee's last day worked. If an employee's last day is 5/20/2021, the effective date of the retirement should be 05/21/2021. For further information on effective dating, see the Job Aid titled **HR351\_Overview of Effective Dating**. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning**.

Make a note of the retirement effective date. This will be used as the effective date when entering the ORP hire row.

10. Select the "Retirement" list item using the **Action** field dropdown button.
11. Select the "Retirement – ORP" list item using the **Reason** field dropdown button.

The **Job Data** page (**Work Location** tab) refreshes.



The screenshot shows the 'Work Location Details' form for employee JMU00134. The 'HR Status' is 'Inactive' and the 'Payroll Status' is 'Retired', both highlighted with a red box. The 'Action' is 'Retirement' and the 'Reason' is 'Retirement-ORP'. The 'Last Date Worked' is 06/30/2021. The form includes various date pickers, dropdown menus, and checkboxes.

12. After selecting the action and action reason, the **HR Status** and **Payroll Status** fields will update as applicable. Validate that the HR status displays as “Inactive” and the Payroll status displays as “Retired”.
13. Click the **Save** button.

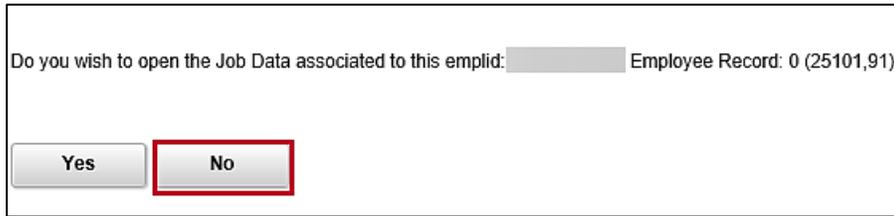
**ORP Retiree New Hire**

Next, if the retiree is eligible, the retiree is now hired into the ORP Retiree position using a new employment instance. This transaction is completed by an HR Administrator.

14. Navigate to **New Employment Instance** page using the following path:

**Navigator > Workforce Administration > Personal Information > Organizational Relationship > New Employment Instance**

A **Confirmation** message displays.



Do you wish to open the Job Data associated to this emplid: [redacted] Employee Record: 0 (25101,91)

15. Click the **No** button.

The **New Employment Instance** page displays.



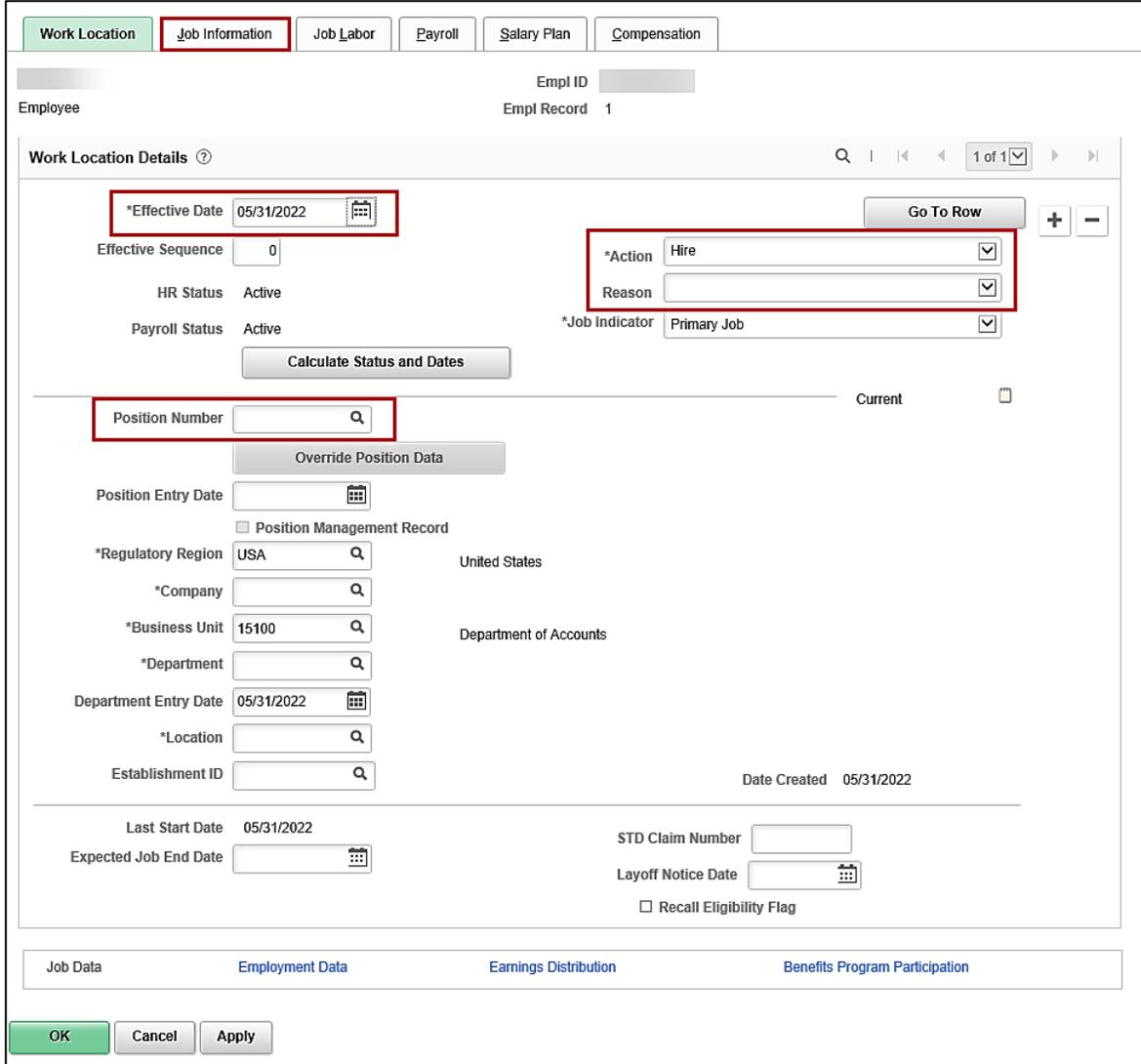
**New Employment Instance**

Empl ID [redacted]

Empl Record 1

16. Click the **Add Relationship** button to add job information for the new employee record.

The **Job Data** page displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Job Information' tab selected. The 'Effective Date' field is highlighted with a red box and contains the date 05/31/2022. The 'Action' field is highlighted with a red box and contains the value 'Hire'. The 'Reason' field is highlighted with a red box and is empty. The 'Position Number' field is highlighted with a red box and is empty. The 'Regulatory Region' is set to 'USA'. The 'Company' field is empty. The 'Business Unit' is set to '15100'. The 'Department' field is empty. The 'Department Entry Date' is set to 05/31/2022. The 'Location' field is empty. The 'Establishment ID' field is empty. The 'Date Created' is 05/31/2022. The 'Last Start Date' is 05/31/2022. The 'Expected Job End Date' field is empty. The 'STD Claim Number' field is empty. The 'Layoff Notice Date' field is empty. The 'Recall Eligibility Flag' is unchecked. The 'Job Data' tab is selected.

17. The **Effective Date** field defaults to the current system date. Change the effective date as needed to be the same date of the retirement action completed previously using the **Calendar** icon.
18. Verify that the **Action** field populated by default to “Hire”.
19. Select the “Hir ORP Ret” list item using the **Reason** field dropdown button.
20. Search for or enter your agency’s ORP Retiree Position using the **Position Number** field.

The **Work Location** page refreshes.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Employee
Empl ID

Empl Record 1

**Work Location Details** 1 of 1

*Effective Date	<input type="text" value="07/02/2021"/>		Go To Row	+ -
Effective Sequence	<input type="text" value="0"/>	*Action	<input type="text" value="Hire"/>	
HR Status	Active	Reason	<input type="text" value="Hir ORP Ret"/>	
Payroll Status	Active	*Job Indicator	<input type="text" value="Primary Job"/>	

Position Number  Current

Position Entry Date   Position Management Record

Regulatory Region	USA	United States	
Company	JMU	James Madison University	
Business Unit	21600	James Madison University	
Department	99999	Agency Wide	

Department Entry Date

Location	CENTR	James Madison University	
Establishment ID	<input type="text" value="JMU"/>	James Madison University	Date Created 05/31/2022

Last Start Date	<input type="text" value="07/02/2021"/>	STD Claim Number	<input type="text"/>
Expected Job End Date	<input type="text"/>	Layoff Notice Date	<input type="text"/>

Recall Eligibility Flag

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

21. Click the **Job Information** tab.

The **Job Information** tab displays.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
Employee		Empl ID		Empl Record 1	
<b>Job Information Details</b> <span>1 of 1</span>					
Effective Date	07/02/2021	Action		Hire	
Effective Sequence	0	Reason		Hir ORP Ret	
HR Status	Active	Job Indicator		Primary Job	
Payroll Status	Active				
Current <input type="checkbox"/>					
Job Code	COVHBO	Health Benefits Only			
Entry Date	07/02/2021	Employee		SOC Code	
Supervisor Level	E	Supervisor Name			
Reports To		Full/Part		Full-Time	
Regular/Temporary	Regular	*Officer Code		None	
Empl Class	<input type="text"/>	Shift Rate		<input type="text"/>	
Regular Shift	Not Applicable	Shift Factor		<input type="text"/>	
Classified Ind	Classified				
<b>Standard Hours</b>					
Standard Hours	<input type="text" value="40.00"/>	Work Period		W Weekly	
FTE	<input type="text" value="1.000000"/>	As of Date		07/02/2021	
<input type="checkbox"/> Adds to FTE Actual Count?		<input type="checkbox"/> Encumbrance Override			
Combined Standard Hours	40.00	FTE	1.000000		
<b>Contract Number</b>					
Contract Number	<input type="text"/>	<input type="button" value="Next Contract Number"/>			
Contract Type					
USA					
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation		
<input type="button" value="OK"/>	<input type="button" value="Cancel"/>	<input type="button" value="Apply"/>			
<a href="#">Work Location</a>   <a href="#">Job Information</a>   <a href="#">Job Labor</a>   <a href="#">Payroll</a>   <a href="#">Salary Plan</a>   <a href="#">Compensation</a>					

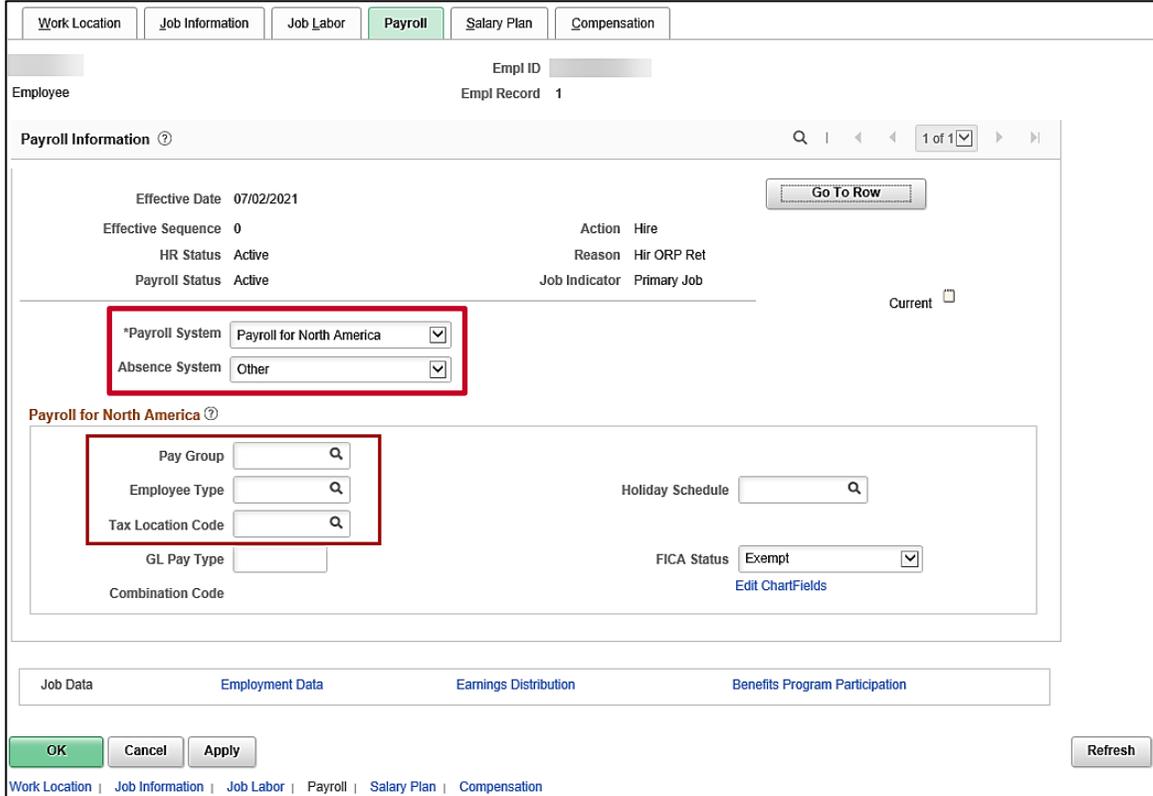
22. Select the “ORP Retiree” list item using the **Empl Class** field dropdown button.

The **Job Information** tab refreshes with the selected Employee Class.

Work Location	Job Information	Job Labor	Payroll	Salary Plan	Compensation
Employee		Empl ID			
		Empl Record		1	
<b>Job Information Details</b> <span>?</span> <span>1 of 1</span>					
Effective Date	07/02/2021			<b>Go To Row</b>	
Effective Sequence	0	Action	Hire		
HR Status	Active	Reason	Hir ORP Ret		
Payroll Status	Active	Job Indicator	Primary Job		
Current <input type="checkbox"/>					
Job Code	COVHBO	Health Benefits Only			
Entry Date	07/02/2021	SOC Code			
Supervisor Level	E	Employee	Supervisor Name		
Reports To					
Regular/Temporary	Regular	Full/Part	Full-Time		
Empl Class	ORPRetiree	*Officer Code	None		
Regular Shift	Not Applicable	Shift Rate			
Classified Ind	Classified	Shift Factor			
<b>Standard Hours</b> <span>?</span>					
Standard Hours	40.00	Work Period	W	Weekly	
FTE	1.000000	As of Date	07/02/2021		
<input type="checkbox"/> Adds to FTE Actual Count?		<input type="checkbox"/> Encumbrance Override			
Combined Standard Hours	40.00	FTE	1.000000		
<b>Contract Number</b> <span>?</span>					
Contract Number				<b>Next Contract Number</b>	
Contract Type					
<span>USA</span>					
Job Data	Employment Data	Earnings Distribution	Benefits Program Participation		
<b>OK</b>	Cancel	Apply			
<a href="#">Work Location</a>   <a href="#">Job Information</a>   <a href="#">Job Labor</a>   <a href="#">Payroll</a>   <a href="#">Salary Plan</a>   <a href="#">Compensation</a>					

23. Click the **Payroll** tab.

The **Payroll** tab displays.



The screenshot shows the 'Payroll' tab selected in a system interface. The interface displays the following information:

- Employee Information:** Empl ID [redacted], Empl Record 1.
- Payroll Information:**
  - Effective Date: 07/02/2021
  - Effective Sequence: 0
  - HR Status: Active
  - Payroll Status: Active
  - Action: Hire
  - Reason: Hir ORP Ret
  - Job Indicator: Primary Job
  - Current:
- Payroll System and Absence System:**
  - \*Payroll System: Payroll for North America (dropdown menu)
  - Absence System: Other (dropdown menu)
- Payroll for North America:**
  - Pay Group: [Search icon]
  - Employee Type: [Search icon]
  - Tax Location Code: [Search icon]
  - GL Pay Type: [Text field]
  - Combination Code: [Text field]
  - Holiday Schedule: [Search icon]
  - FICA Status: Exempt (dropdown menu)
  - Edit ChartFields: [Link]
- Navigation and Action:**
  - Job Data, Employment Data, Earnings Distribution, Benefits Program Participation (links)
  - OK, Cancel, Apply (buttons)
  - Refresh (button)

24. The **Payroll System** field defaults to “Payroll for North America”. Do not change.
25. The **Absence System** field defaults to “Other”. Do not change.
26. Select the “MNP” list item using the **Pay Group Search and Select** icon (magnifying glass). This is the Non-Payroll Pay Group.
27. Select the applicable tax location using the **Tax Location Code Search and Select** icon (magnifying glass).

The **Payroll** tab refreshes with the selected Pay Group and Tax Location Code.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Empl ID

Employee Empl Record 1

**Payroll Information** 1 of 1

---

Effective Date 07/02/2021	<a href="#">Go To Row</a>
Effective Sequence 0	Action Hire
HR Status Active	Reason Hir ORP Ret
Payroll Status Active	Job Indicator Primary Job

Current 🗄

\*Payroll System Payroll for North America

Absence System Other

---

**Payroll for North America**

Pay Group <span style="border: 1px solid #ccc; padding: 2px;">MNP</span>	Non-Payroll	
Employee Type <span style="border: 1px solid #ccc; padding: 2px;">S</span>	Salaried	Holiday Schedule <span style="border: 1px solid #ccc; padding: 2px;">NOHOL</span> LOCALITY
Tax Location Code <span style="border: 1px solid #ccc; padding: 2px;">660</span>		FICA Status <span style="border: 1px solid #ccc; padding: 2px;">Exempt</span>
GL Pay Type <span style="border: 1px solid #ccc; padding: 2px;"></span>		<a href="#">Edit ChartFields</a>
Combination Code		

Job Data
Employment Data
Earnings Distribution
Benefits Program Participation

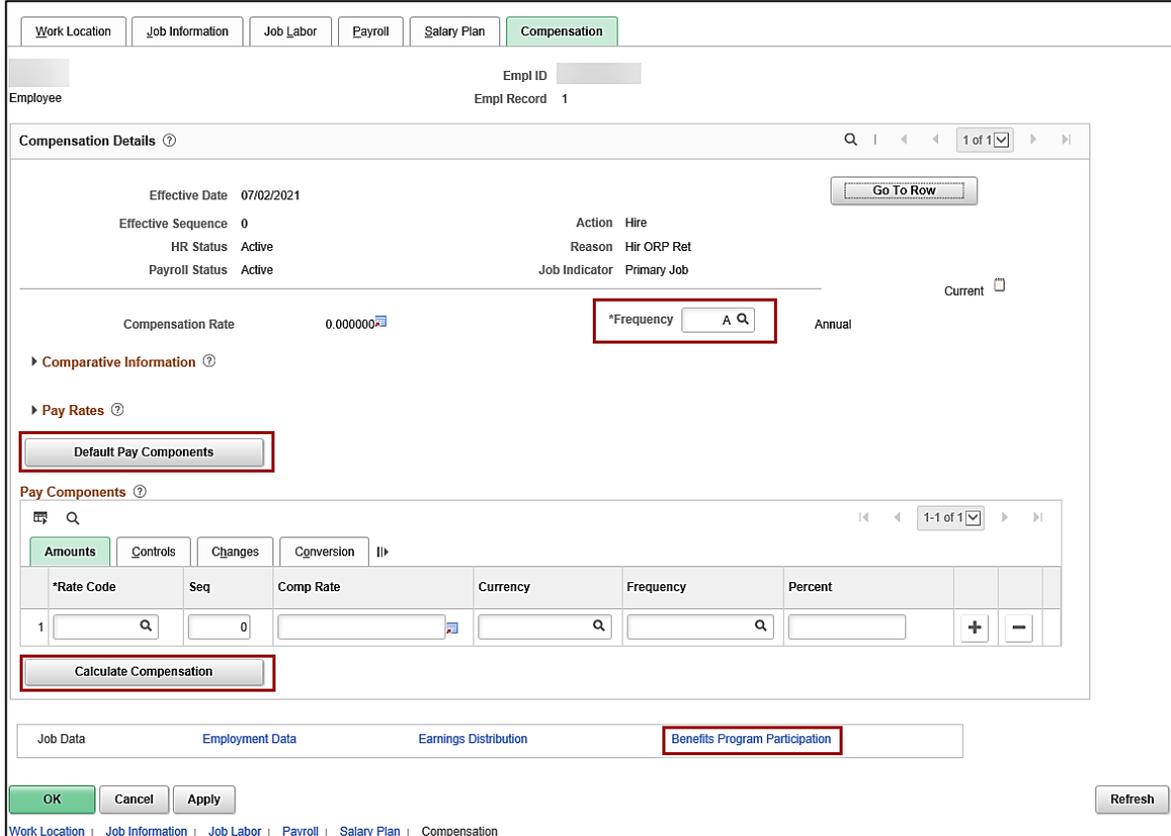
OK
Cancel
Apply

Refresh

[Work Location](#)
[Job Information](#)
[Job Labor](#)
[Payroll](#)
[Salary Plan](#)
[Compensation](#)

28. Click the **Compensation** tab.

The **Compensation** tab displays.



The screenshot displays the 'Compensation' tab of a software application. At the top, there are navigation tabs: Work Location, Job Information, Job Labor, Payroll, Salary Plan, and Compensation (which is selected). Below these, there are fields for Employee ID and Empl Record (1). The main section is titled 'Compensation Details' and contains the following information:

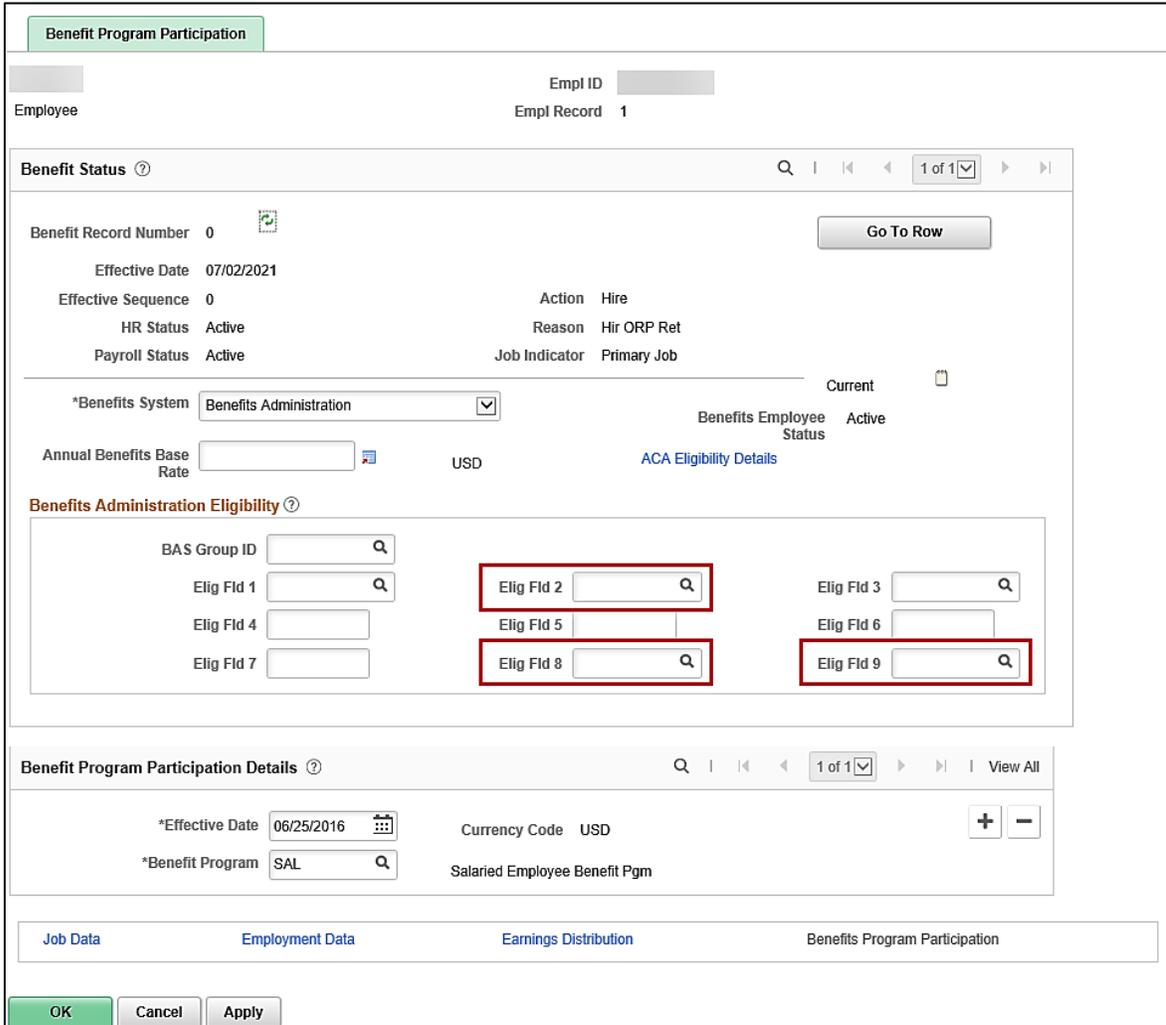
- Effective Date: 07/02/2021
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Action: Hire
- Reason: Hir ORP Ret
- Job Indicator: Primary Job
- Compensation Rate: 0.000000
- \*Frequency: A (highlighted with a red box)
- Annual
- Current:

Below this information are expandable sections: 'Comparative Information' and 'Pay Rates'. Under 'Pay Rates', there is a 'Default Pay Components' button (highlighted with a red box). Below that is a 'Pay Components' table with columns: \*Rate Code, Seq, Comp Rate, Currency, Frequency, and Percent. The table contains one row with values: 1, 0, [empty], [empty], [empty], [empty]. Below the table is a 'Calculate Compensation' button (highlighted with a red box). At the bottom of the main section are links for Job Data, Employment Data, Earnings Distribution, and Benefits Program Participation (highlighted with a red box). At the very bottom, there are buttons for OK, Cancel, Apply, and Refresh.

29. The **Frequency** field defaults to “A” for Annual. Update the pay frequency to “M” Monthly using the **Frequency Search and Select** icon (magnifying glass).
30. Click the **Defaults Pay Components** button.
 

**Note:** The Compensation Rate should be “0”. No additional **Pay Component** fields should be entered.
31. Click the **Calculate Compensation** button.
32. Click the **Benefits Program Participation** link.

The **Benefit Program Participation** page displays.



The screenshot displays the 'Benefit Program Participation' interface. At the top, it shows 'Benefit Program Participation' in a green header. Below this, there's a section for 'Employee' with 'Empl ID' and 'Empl Record 1'. The 'Benefit Status' section includes a search bar, a 'Go To Row' button, and details for 'Benefit Record Number 0', 'Effective Date 07/02/2021', 'Effective Sequence 0', 'Action Hire', 'HR Status Active', 'Reason Hir ORP Ret', 'Payroll Status Active', and 'Job Indicator Primary Job'. There's also a '\*Benefits System' dropdown set to 'Benefits Administration' and 'Annual Benefits Base Rate' field. The 'Benefits Administration Eligibility' section contains search fields for 'BAS Group ID', 'Elig Fld 1-9', with fields 2, 8, and 9 highlighted in red. The 'Benefit Program Participation Details' section shows '\*Effective Date 06/25/2016', 'Currency Code USD', and '\*Benefit Program SAL'. At the bottom, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation', along with 'OK', 'Cancel', and 'Apply' buttons.

**Note:** Use the **Configuration Workbook** to complete **Eligibility Fields 2, 8, and 9** based on the appropriate scenarios for the ORP Retiree.

33. Select the applicable value for the **Eligibility 2** field using the **Search and Select** icon (magnifying glass).

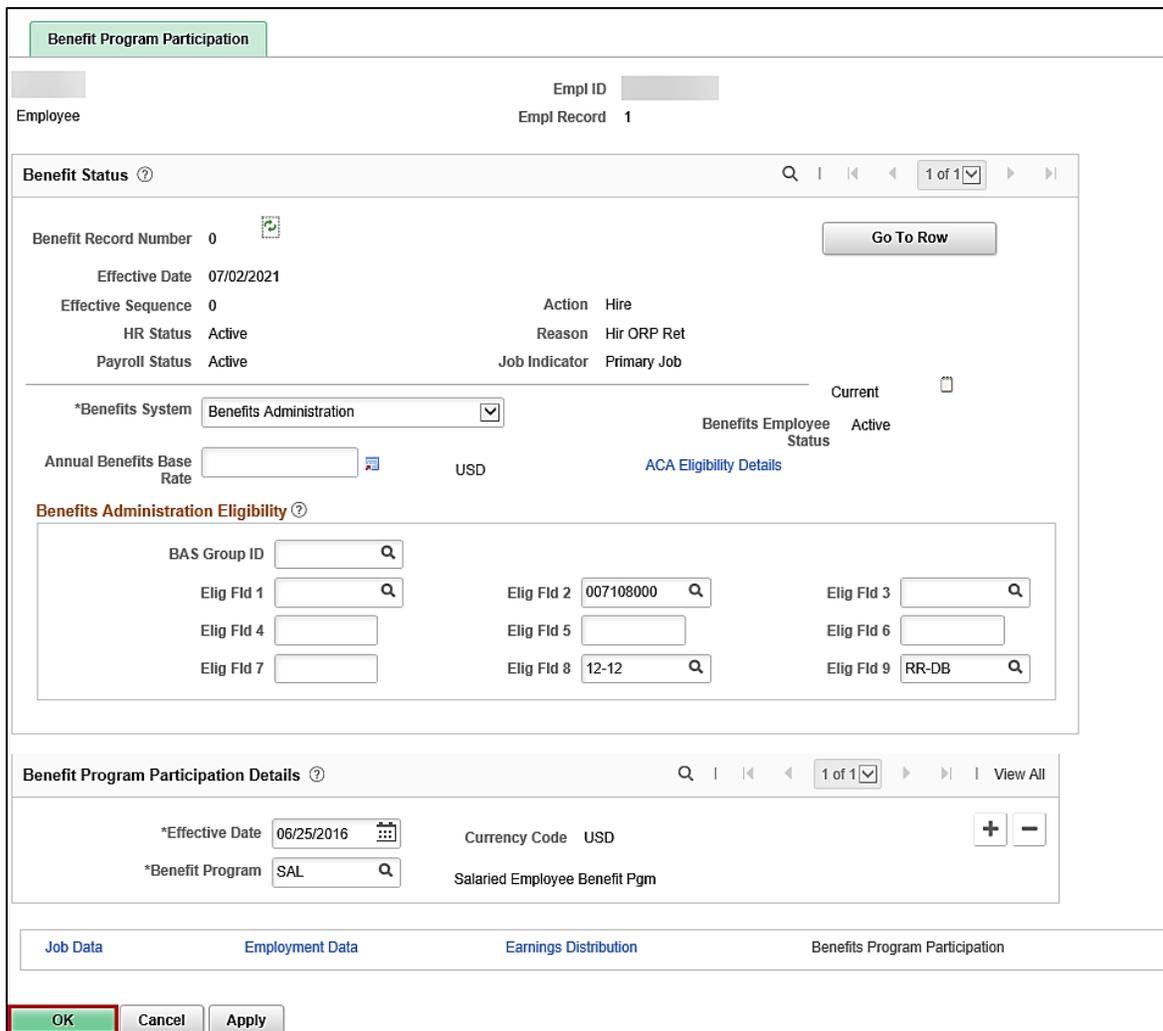
**Note:** If the retiree is selecting to decline medical coverage permanently, select the value of "000000000". If the retiree is selecting medical coverage, select the value of "007108000".

34. Select the applicable value for the **Eligibility 8** field using the **Search and Select** icon (magnifying glass). Example: "12-12".

**BN361\_ORP Retiree Guide**

35. Select the applicable value for the **Eligibility 9** field using the **Search and Select** icon (magnifying glass). Example: "RR-DB".

The **Benefits Program Participation** page refreshes.



The screenshot shows the 'Benefits Program Participation' page. At the top, there is a header with 'Benefit Program Participation' and a search bar. Below this, the 'Benefit Status' section displays details for a specific record, including 'Benefit Record Number 0', 'Effective Date 07/02/2021', and 'HR Status Active'. A 'Go To Row' button is visible. The 'Benefits Administration Eligibility' section contains several fields for eligibility, with 'Elig Fld 9' set to 'RR-DB'. At the bottom, the 'Benefit Program Participation Details' section shows 'Effective Date 06/25/2016' and '\*Benefit Program SAL'. A navigation bar at the bottom includes tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation'. The 'OK' button is highlighted in red.

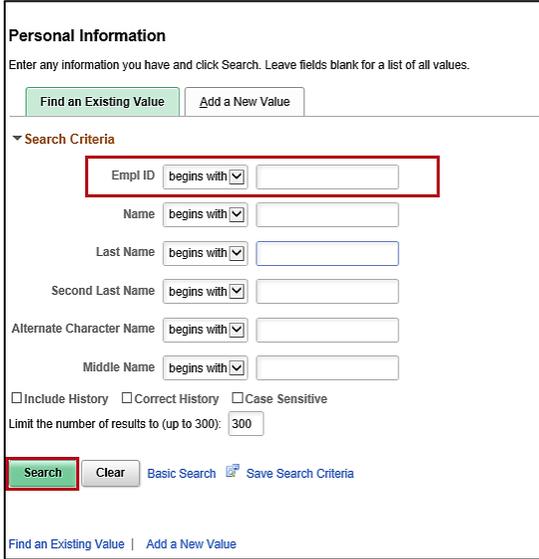
36. Click the **OK** button.

Update the retiree's email address to a personal email address by completing the following steps:

37. Navigate to the **Modify a Person** page using the following path:

**Navigator > Workforce Administration > Personal Information > Modify a Person**

The **Personal Information Search** page displays.



**Personal Information**  
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**

Empl ID  begins with

Name  begins with

Last Name  begins with

Second Last Name  begins with

Alternate Character Name  begins with

Middle Name  begins with

Include History  Correct History  Case Sensitive

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

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

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

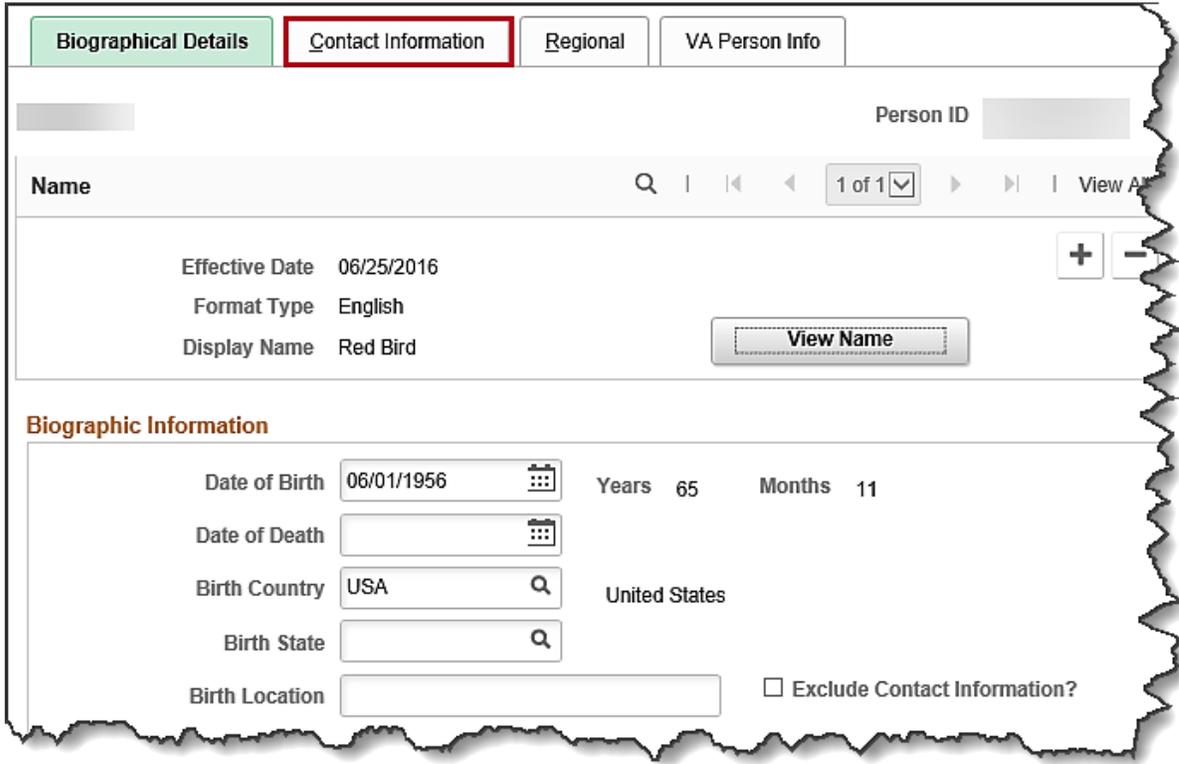
38. Search for the applicable retiree (employee) by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/retiree.

39. Click the **Search** button.

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The **Personal Information** page displays with the **Biographical Details** tab displayed by default.



Biographical Details **Contact Information** Regional VA Person Info

Person ID

Name 1 of 1 View All

Effective Date 06/25/2016 + -

Format Type English

Display Name Red Bird View Name

**Biographic Information**

Date of Birth 06/01/1956 Years 65 Months 11

Date of Death

Birth Country USA United States

Birth State

Birth Location  Exclude Contact Information?

40. Click **Contact Information** tab.

The **Contact Information** tab displays.

Biographical Details		Contact Information	Regional	VA Person Info
Empl ID <input type="text"/>				
<b>Current Addresses</b>				
<input type="text"/> <input type="text"/> <span style="float: right;">1-1 of 1   View All</span>				
Address Type	As Of Date	Status	Address	
Home	09/25/2010	A	100 MAIN ST RICHMOND, VA 22834-2300 Rockingham	<a href="#">View Address Detail</a> <input type="button" value="+"/> <input type="button" value="-"/>
<b>Phone Information</b>				
<input type="text"/> <input type="text"/> <span style="float: right;">1-2 of 2   View All</span>				
*Phone Type	Telephone	Extension	Preferred	
Business	<input type="text" value="555/555-5555"/>	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
Home	<input type="text" value="555/555-5555"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<b>Email Option Selection</b>				
<input type="radio"/> Agency Provided Email <input checked="" type="radio"/> Pending Agency Provided Email <input type="radio"/> Employee Provided Email				
<b>Email Addresses</b>				
*Email Type	*Email Address	Preferred		
Business	<input type="text" value="noemail@virginia.gov"/>	<input checked="" type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>	
<b>Instant Message IDs</b>				
<input type="text"/> <input type="text"/> <span style="float: right;">1-1 of 1   View All</span>				
*IM Protocol	*IM Domain	*Network ID	Preferred	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="button" value="Save"/> <input type="button" value="Return to Search"/> <input type="button" value="Previous in List"/> <input type="button" value="Next in List"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>				
<a href="#">Biographical Details</a>   <a href="#">Contact Information</a>   <a href="#">Regional</a>   <a href="#">VA Person Info</a>				

41. Within the **Email Option Selection** section, click the **Employee Provided Email** radio button.
42. Within the **Email Addresses** section, change the existing email type to “Personal” using the **Email Type** field dropdown button.
43. Enter the retiree’s personal email address (provided by the employee) in the **Email Address** field.
 

**Note:** This email address will be what is used when registering for access to Cardinal. It is important for this to be populated with the personal email address provided by the retiree.
44. Click the **Save** button.

To run the Employee Activity Report for the retiree, use the following navigation path:

**Navigator > Workforce Administration > Job Information > Reports > Employee Activity Report**

45. Run/print the Employee Activity Report for the retiree and insert into your paper file as needed.

**Note:** Refer to the **HCM Reports Catalog** for additional information and the steps used to run this report. The **HCM Reports Catalog** can be found on the Cardinal website under **Resources**.

**Set up Medicare for the ORP Retiree**

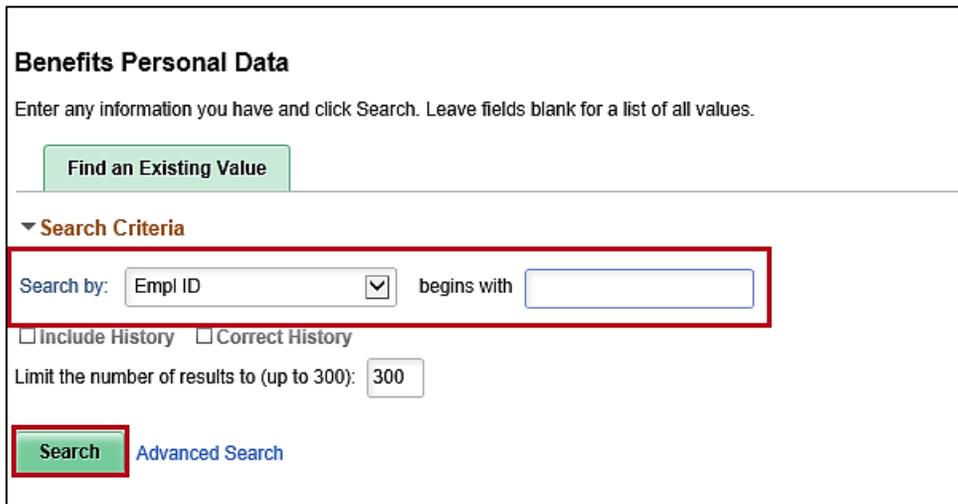
In this scenario, the retiree has employee + spouse coverage, the ORP Retiree turns 65 and is eligible for Medicare, however the spouse is not eligible for Medicare. Next, set up Medicare for the ORP Retiree. This transaction is completed by a BN Administrator after the retiree has been hired into the ORP Retiree Position, the Ben Admin process has run (every 4 hours), and the retiree has a Benefit Program of "RET" or a TLC Program.

Before enrolling the retiree in Medicare Benefits, the BN Administrator must complete the information shown on the **Benefits Personal Data** page.

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

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

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



**Benefits Personal Data**

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:  begins with

Include History  Correct History

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

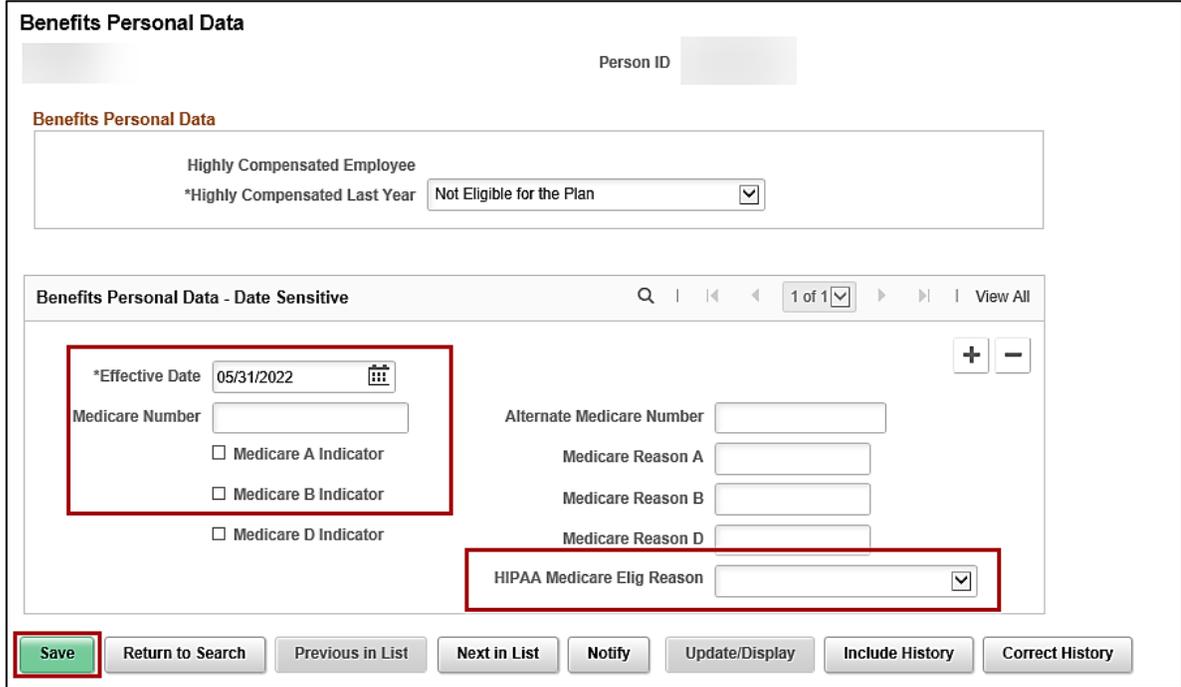
[Search](#) [Advanced Search](#)

2. Search for the applicable retiree (employee) by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/retiree.

3. Click the **Search** button.

The **Benefits Personal Data** page displays with the retiree's information.



**Benefits Personal Data**

Person ID [REDACTED]

**Benefits Personal Data**

Highly Compensated Employee  
 \*Highly Compensated Last Year: Not Eligible for the Plan [v]

**Benefits Personal Data - Date Sensitive** | 1 of 1 | View All

\*Effective Date: 05/31/2022 [Calendar icon]

Medicare Number [REDACTED]

Medicare A Indicator  
 Medicare B Indicator  
 Medicare D Indicator

Alternate Medicare Number [REDACTED]

Medicare Reason A [REDACTED]  
 Medicare Reason B [REDACTED]  
 Medicare Reason D [REDACTED]

HIPAA Medicare Elig Reason [v]

**Save** | Return to Search | Previous in List | Next in List | Notify | Update/Display | Include History | Correct History

4. The **Effective Date** defaults to the current system date. Update to the first day of the month in which the retiree is eligible for Medicare using the **Calendar** icon.

**Note:** Retirees are eligible on the first day of the month in which they turn 65.

5. Click the checkbox options for both the **Medicare A Indicator** and the **Medicare B Indicator**.

**Note:** For End Stage Renal Failure, the Medicare A, B, and/or C checkbox options will not be checked. OHB is establishing the record for End Stage Renal Failure (ESRD).

6. Select the corresponding **HIPAA Medicare Elig Reason** from the following using the dropdown button:

- a. Age
- b. Disability

**Note:** The HIPAA Medicare Eligibility Reason of “End Stage Renal” is only to be used by OHB when the employee is in a Non-Medicare Plan and Medicare is Primary.

The Medicare number will be populated by the BN Administrator when received.

7. Click the **Save** button.

Sample screenshot of the completed **Benefits Personal Data** page:

**Benefits Personal Data**

Person ID

---

**Benefits Personal Data**

Highly Compensated Employee

\*Highly Compensated Last Year Not Eligible for the Plan ▼

**Benefits Personal Data - Date Sensitive** Q | << < 1 of 1 > >> | View All

\*Effective Date 07/01/2021 📅

Medicare Number

Medicare A Indicator

Medicare B Indicator

Medicare D Indicator

HIPAA Medicare Elig Reason Age ▼

Alternate Medicare Number

Medicare Reason A

Medicare Reason B

Medicare Reason D

+ -

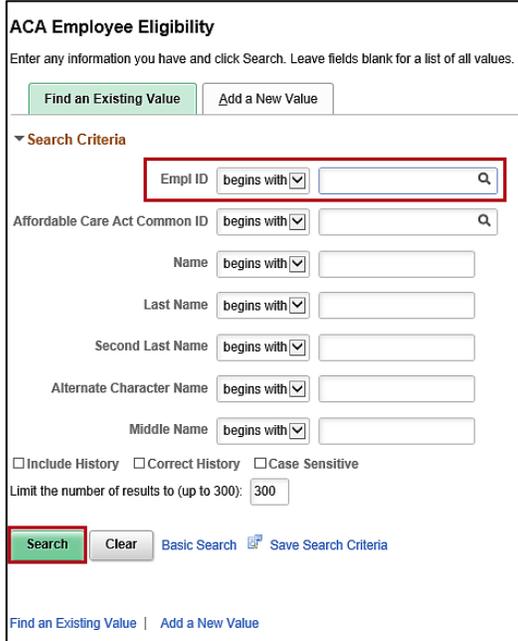
Save
Return to Search
Previous in List
Next in List
Notify
Update/Display
Include History
Correct History

Before enrolling the retiree in Medicare Benefits, the BN Administrator must update the information shown on the **ACA Medicare Eligibility** page.

8. Navigate to the **ACA Employee Eligibility** page using the following path:

**Navigator > Benefits > Employee/Dependent Information > ACA Employee Eligibility**

The **ACA Employee Eligibility Search** page displays.



**ACA Employee Eligibility**  
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**

Empl ID **begins with**

Affordable Care Act Common ID **begins with**

Name **begins with**

Last Name **begins with**

Second Last Name **begins with**

Alternate Character Name **begins with**

Middle Name **begins with**

Include History  Correct History  Case Sensitive

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

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

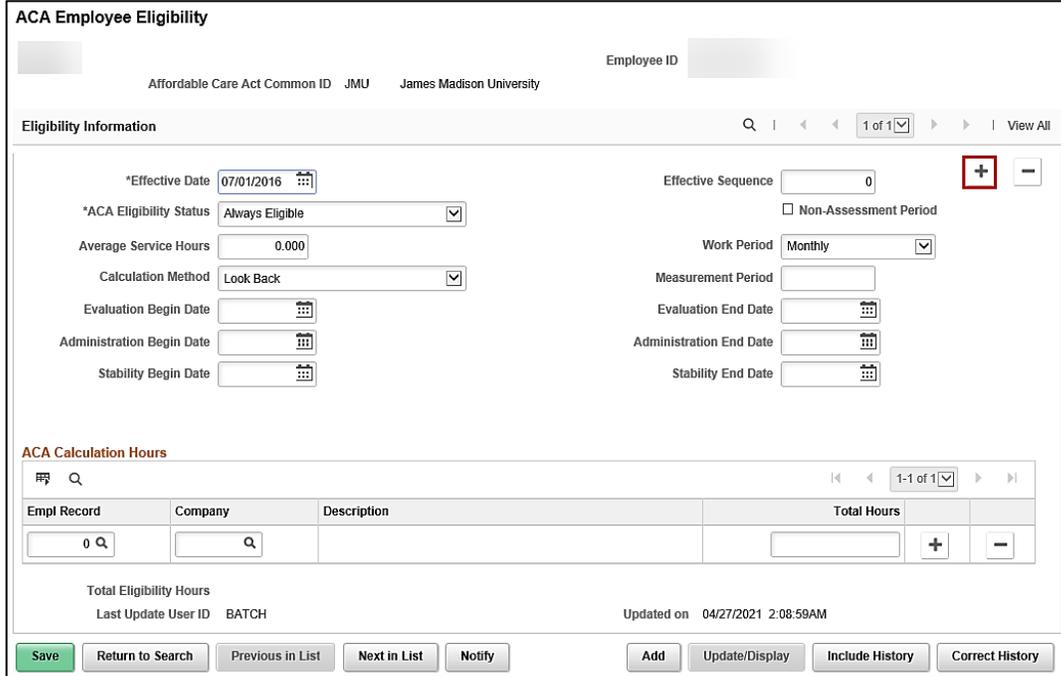
[Find an Existing Value](#) | [Add a New Value](#)

9. Search for the applicable retiree (employee) by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/retiree.

10. Click the **Search** button.

The **ACA Employee Eligibility** page displays with the retiree’s information.



**ACA Employee Eligibility**

Affordable Care Act Common ID JMU James Madison University Employee ID

Eligibility Information 1 of 1 View All

\*Effective Date 07/01/2016 Effective Sequence 0 **+** -

\*ACA Eligibility Status Always Eligible  Non-Assessment Period

Average Service Hours 0.000 Work Period Monthly

Calculation Method Look Back Measurement Period

Evaluation Begin Date Evaluation End Date

Administration Begin Date Administration End Date

Stability Begin Date Stability End Date

**ACA Calculation Hours**

Empl Record	Company	Description	Total Hours
0			

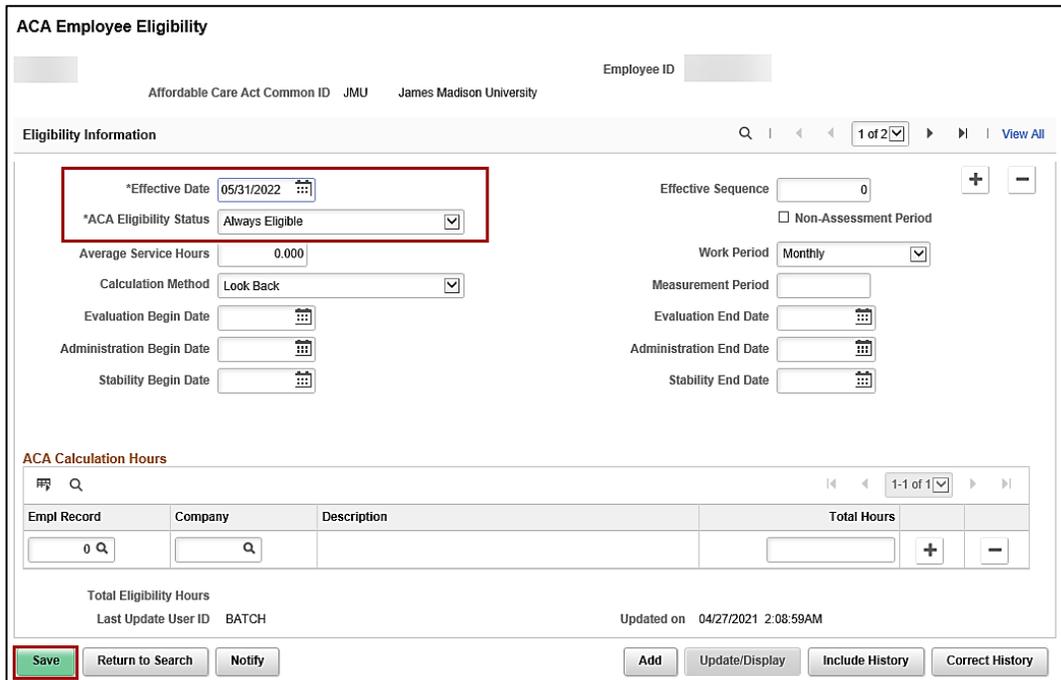
Total Eligibility Hours

Last Update User ID BATCH Updated on 04/27/2021 2:08:59AM

Save Return to Search Previous in List Next in List Notify Add Update/Display Include History Correct History

11. Click the **Add a New Row** icon “+” to add a new effective dated row.

The **ACA Employee Eligibility** page refreshes with a new row.



**ACA Employee Eligibility**

Affordable Care Act Common ID JMU James Madison University Employee ID

Eligibility Information 1 of 2 View All

\*Effective Date 05/31/2022 Effective Sequence 0 + -

\*ACA Eligibility Status Always Eligible  Non-Assessment Period

Average Service Hours 0.000 Work Period Monthly

Calculation Method Look Back Measurement Period

Evaluation Begin Date Evaluation End Date

Administration Begin Date Administration End Date

Stability Begin Date Stability End Date

**ACA Calculation Hours**

Empl Record	Company	Description	Total Hours
0			

Total Eligibility Hours

Last Update User ID BATCH Updated on 04/27/2021 2:08:59AM

Save Return to Search Notify Add Update/Display Include History Correct History

12. The **Effective Date** will default to the current system date. Update to the same date as the retiree’s hire date into the ORP Retiree Position as needed using the **Calendar** icon.

13. Select the “Excluded” list item using the **ACA Eligibility Status** dropdown button.

14. Click the **Save** button.

Sample screenshot of the completed **ACA Employee Eligibility** page:

**ACA Employee Eligibility**

Employee ID

Affordable Care Act Common ID   JMU   James Madison University

---

**Eligibility Information** 1 of 2 | View All

*Effective Date <input type="text" value="07/02/2021"/>	Effective Sequence <input type="text" value="0"/>
*ACA Eligibility Status <input type="text" value="Excluded"/>	<input type="checkbox"/> Non-Assessment Period
Average Service Hours <input type="text" value="0.000"/>	Work Period <input type="text" value="Monthly"/>
Calculation Method <input type="text" value="Look Back"/>	Measurement Period <input type="text"/>
Evaluation Begin Date <input type="text"/>	Evaluation End Date <input type="text"/>
Administration Begin Date <input type="text"/>	Administration End Date <input type="text"/>
Stability Begin Date <input type="text"/>	Stability End Date <input type="text"/>

---

**ACA Calculation Hours**

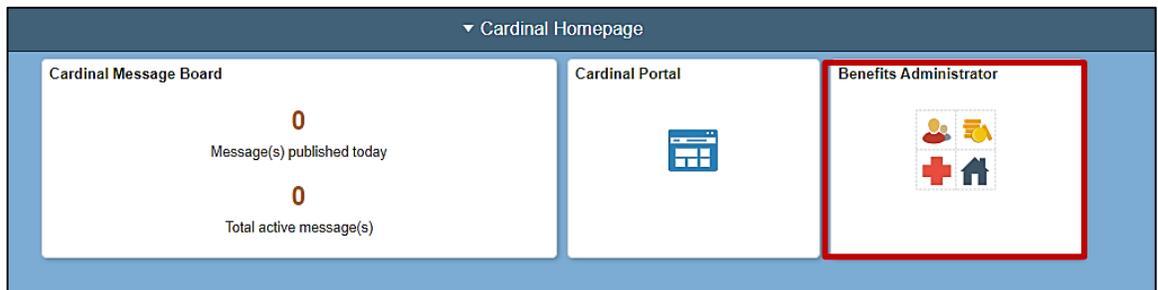
Empl Record	Company	Description	Total Hours
0			+

Total Eligibility Hours  
Last Update User ID BATCH      Updated on 04/27/2021 2:08:59AM

Next, complete the benefits enrollment for the retiree.

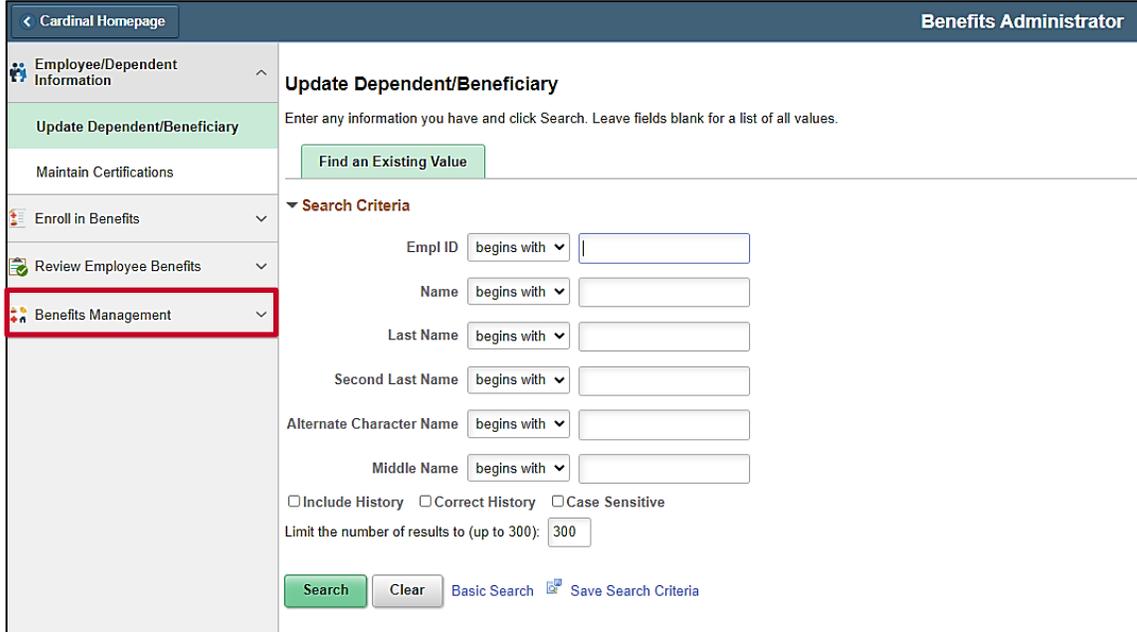
15. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



16. Click the **Benefits Administrator** tile.

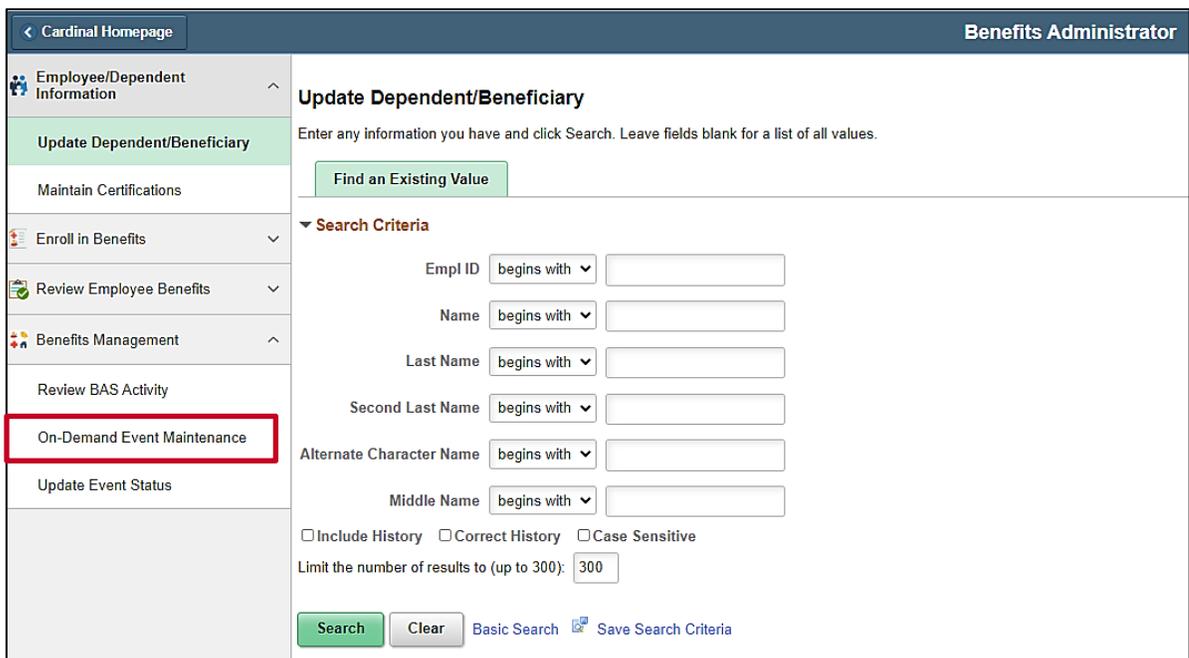
The **Update Dependent/Beneficiary** page displays.



The screenshot shows the 'Update Dependent/Beneficiary' page in the 'Benefits Administrator' role. The left sidebar contains a menu with the following items: 'Employee/Dependent Information', 'Update Dependent/Beneficiary', 'Maintain Certifications', 'Enroll in Benefits', 'Review Employee Benefits', and 'Benefits Management'. The 'Benefits Management' item is highlighted with a red box. The main content area is titled 'Update Dependent/Beneficiary' and includes a 'Find an Existing Value' button, a 'Search Criteria' section with dropdown menus for 'Empl ID', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', and a 'Search' button.

17. Click the **Benefits Management** menu item on the left-hand side of the screen.

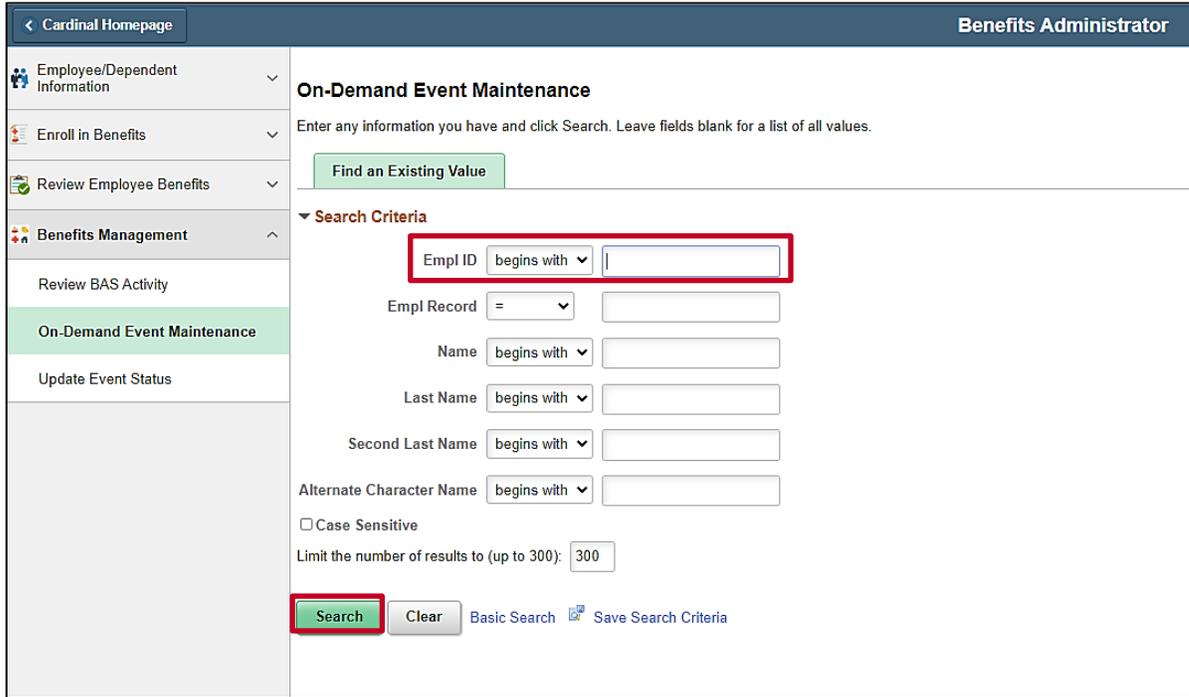
The **Benefits Management** menu expands.



The screenshot shows the 'Update Dependent/Beneficiary' page in the 'Benefits Administrator' role. The left sidebar contains a menu with the following items: 'Employee/Dependent Information', 'Update Dependent/Beneficiary', 'Maintain Certifications', 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', 'Review BAS Activity', 'On-Demand Event Maintenance', and 'Update Event Status'. The 'On-Demand Event Maintenance' item is highlighted with a red box. The main content area is titled 'Update Dependent/Beneficiary' and includes a 'Find an Existing Value' button, a 'Search Criteria' section with dropdown menus for 'Empl ID', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', and a 'Search' button.

18. Click the **On-Demand Event Maintenance** menu list item.

The **On-Demand Event Maintenance** page displays.



19. Search for the applicable retiree (employee) by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/retiree.

20. Click the **Search** button.

**Note:** When the search results display, select Empl record 1 (or higher) when searching for a retiree.

The **On-Demand Event Maintenance** page displays for the applicable retiree.

**On-Demand Event Maintenance**

Person ID  Ben Record 1

---

Activity Date Source Empl Record 0

Pending Activities 0

Action

---

Event ID 1 Event Date 07/02/2021 Status Prepared Class HIR

Event Status Open for Processing

Run Date
**Frequency**
 Deduction Frequency  Annual Frequency

Entered 0 of 1

Errors 0

 Finalize/Apply Defaults

Run Date

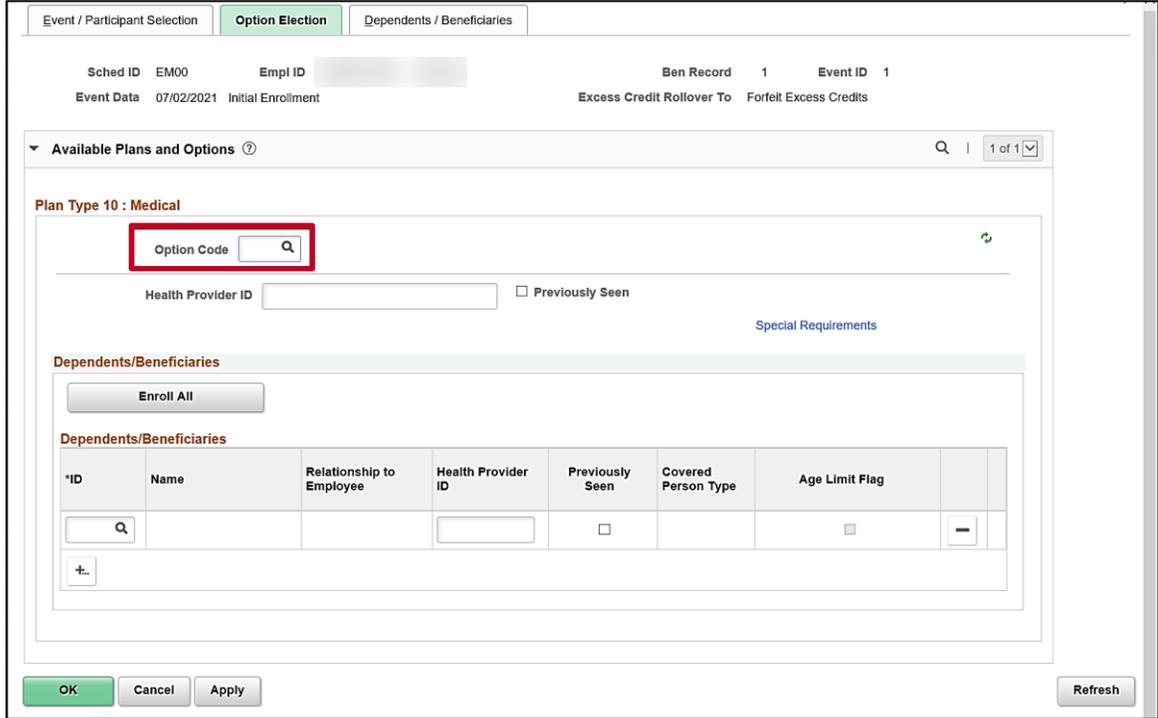
---

Process Indicator N 
Normal Processing

**Note:** Since the Ben Admin Process has run in Cardinal, the event is already prepared.

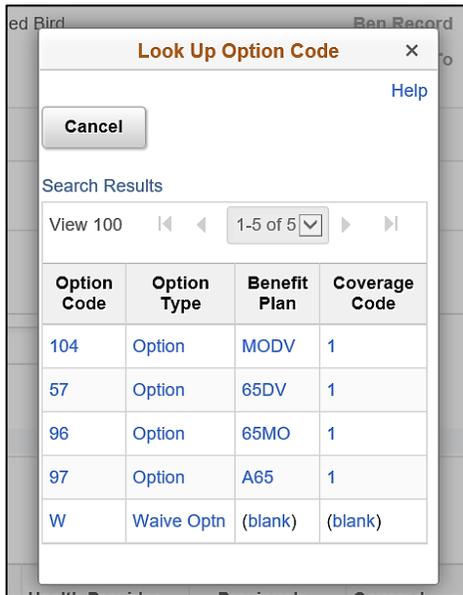
21. Click the **Election Entry** button to make the benefit elections for the retiree.

The **Election Entry** page displays with the **Option Election** tab displayed by default.



22. Within the **Plan Type 10: Medical** section, click the **Option Code Search and Select** icon (magnifying glass).

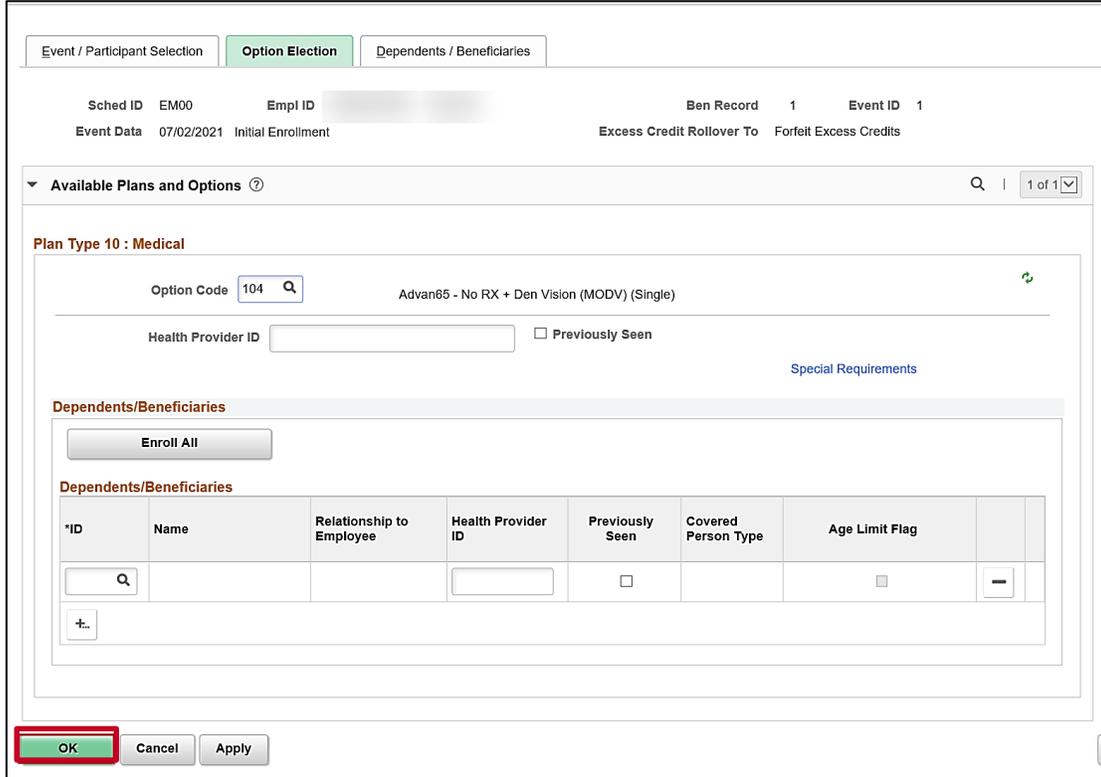
The **Look Up Option Code** page displays in a pop-up window.



Option Code	Option Type	Benefit Plan	Coverage Code
104	Option	MODV	1
57	Option	65DV	1
96	Option	65MO	1
97	Option	A65	1
W	Waive Optn	(blank)	(blank)

23. Select a Benefit Plan with a **Coverage Code 1** for single coverage over the age of 65.

The **Election Entry** page returns.



Event / Participant Selection | **Option Election** | Dependents / Beneficiaries

Sched ID EM00 Empl ID [REDACTED] Ben Record 1 Event ID 1  
 Event Data 07/02/2021 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 1

**Plan Type 10 : Medical**

Option Code  Advan65 - No RX + Den Vision (MODV) (Single)

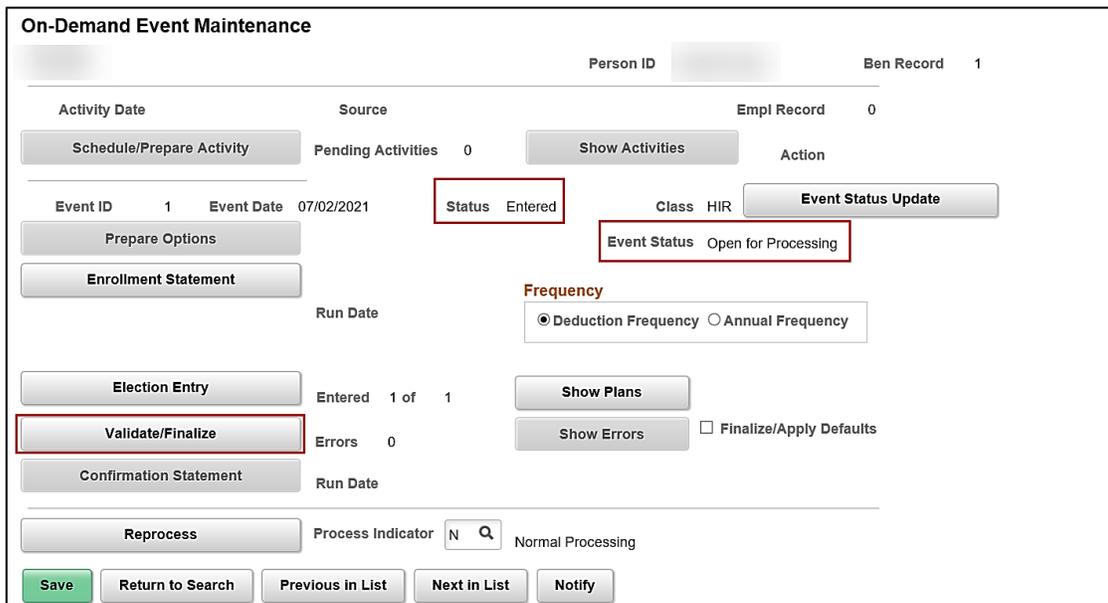
Health Provider ID   Previously Seen [Special Requirements](#)

**Dependents/Beneficiaries**

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
<input type="text"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>

24. Click the **OK** button.

The **On-Demand Event Maintenance** page returns.



**On-Demand Event Maintenance**

Person ID [REDACTED] Ben Record 1

Activity Date Source Empl Record 0

Pending Activities 0  Action

Event ID 1 Event Date 07/02/2021 **Status Entered** Class HIR   
 Event Status Open for Processing

Run Date **Frequency**  
 Deduction Frequency  Annual Frequency

Entered 1 of 1   
 Errors 0   Finalize/Apply Defaults

Run Date

Process Indicator

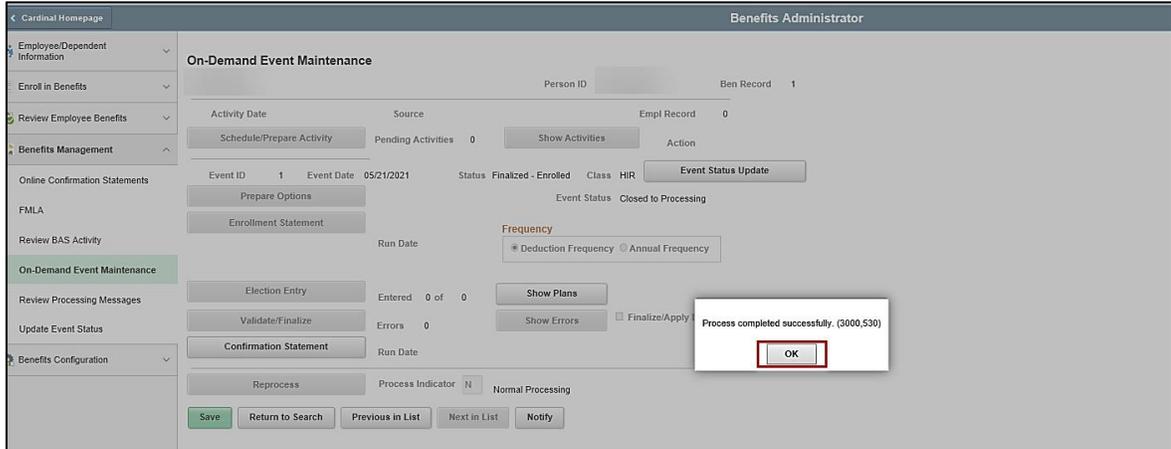
25. Confirm that the **Status** field is “Entered” and that the **Event Status** field is “Open for Processing”.

**BN361\_ORP Retiree Guide**

26. Click the **Validate/Finalize** button to validate the elections, close the event, and update the Base Benefits Tables.

**Note:** Once the event has been finalized, you will receive a message indicating that the process has completed successfully.

The page refreshes and the process confirmation message displays in a pop-up window.



The screenshot shows the 'On-Demand Event Maintenance' interface in the Cardinal Benefits Administrator. The main content area displays the following information:

- Event ID:** 1
- Event Date:** 05/21/2021
- Status:** Finalized - Enrolled
- Class:** HIR
- Event Status:** Closed to Processing
- Entered:** 0 of 0
- Errors:** 0
- Process Indicator:** N
- Normal Processing:** Yes

A pop-up window is displayed in the bottom right corner with the following text:

Process completed successfully. (3000,530)

OK

27. Click the **OK** button.

The **On-Demand Event Maintenance** page returns.

**On-Demand Event Maintenance**

Person ID [redacted] Ben Record 1

---

Activity Date [redacted] Source [redacted] Empl Record 0

Pending Activities 0
 
 Action

---

Event ID 1 Event Date 07/02/2021
 Status Finalized - Enrolled
 Class HIR

Event Status Closed to Processing

Run Date
   
**Frequency**
  
 Deduction Frequency
  Annual Frequency

Entered 0 of 0

Errors 0
 
 Finalize/Apply Defaults

Run Date

---

Process Indicator N Normal Processing

28. Confirm that the **Status** field is “Finalized – Enrolled” and the **Event Status** field is “Closed to Processing”.

This processes for the retiree are now complete.

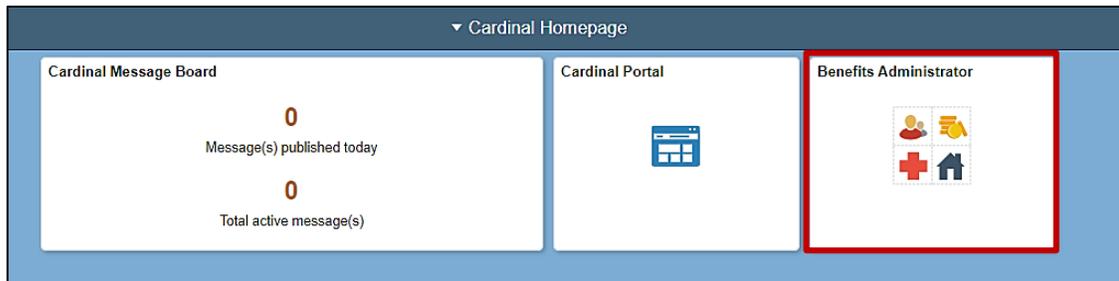
**Hire the Spouse as an Employee**

Next, the HR Administrator needs to hire the spouse as an employee.

Before this can happen, the BN Administrator or the HR Administrator (with the BN Read-only Role) must gather the personal information (e.g., Social Security number, date of birth, etc.) for the spouse from the **Update Dependent/Beneficiary** page and provide it to the HR Administrator.

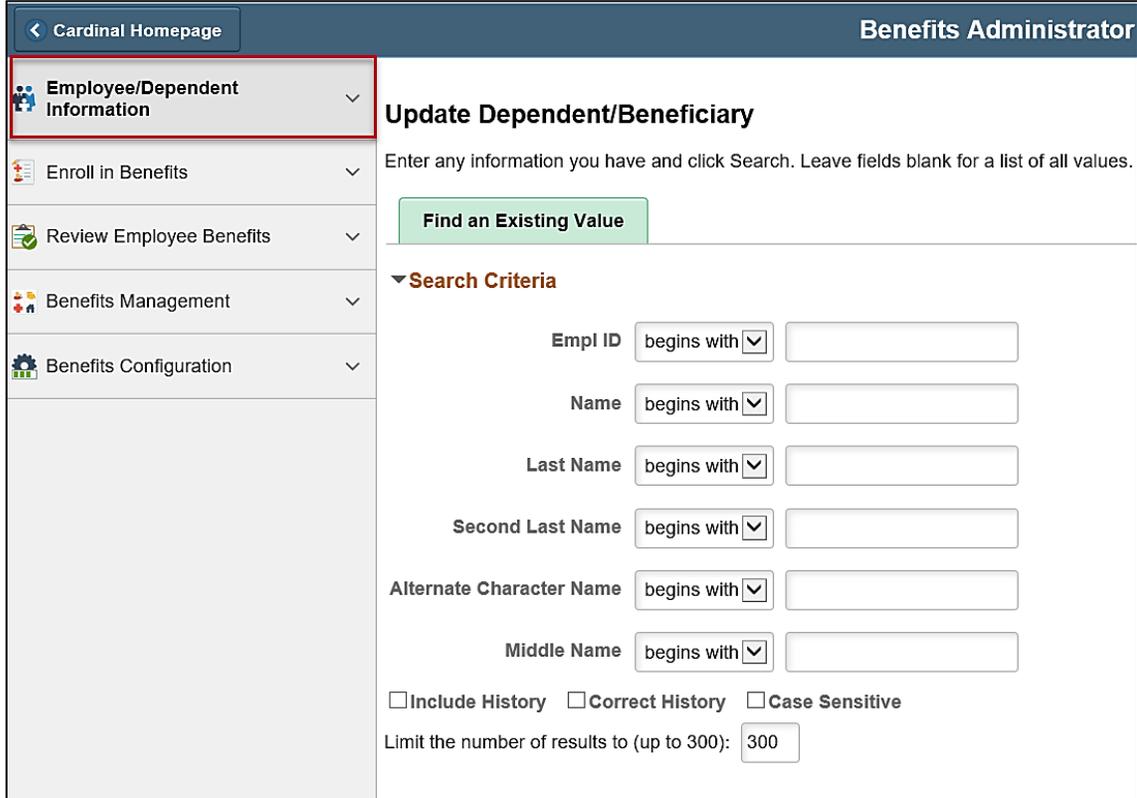
1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



2. Click the **Benefits Administrator** tile.

The **Update Dependent/Beneficiary Search** page displays.



Cardinal Homepage Benefits Administrator

**Employee/Dependent Information** Update Dependent/Beneficiary

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

Review Employee Benefits **Find an Existing Value**

Benefits Management ▼ **Search Criteria**

Benefits Configuration

Empl ID begins with

Name begins with

Last Name begins with

Second Last Name begins with

Alternate Character Name begins with

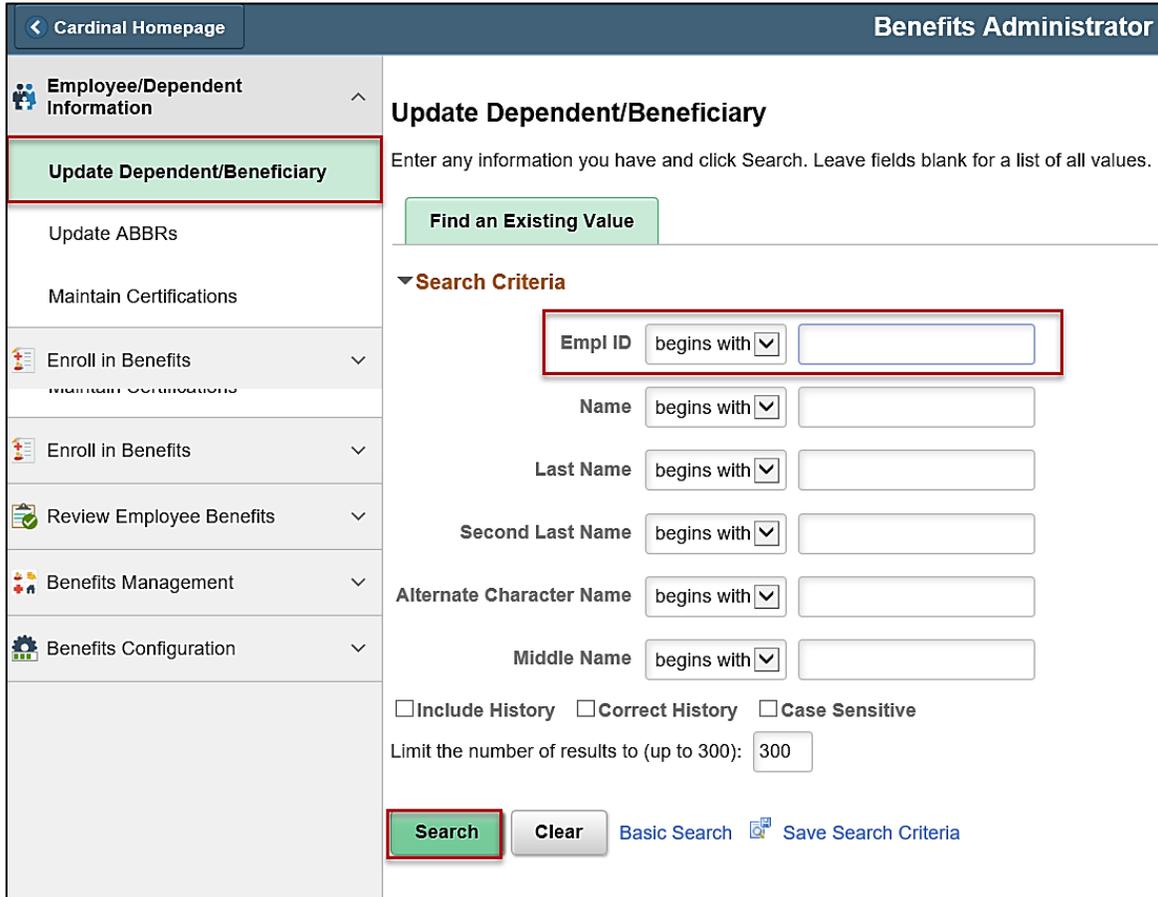
Middle Name begins with

Include History  Correct History  Case Sensitive

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

3. Click the **Employee/Dependent Information** menu item on the left-hand side of the screen.

The **Employee/Dependent Information** menu expands and the **Update Dependent/Beneficiary Search** page is displayed by default.



The screenshot displays the 'Update Dependent/Beneficiary' search interface. On the left is a sidebar with a navigation menu. The main content area is titled 'Update Dependent/Beneficiary' and includes a 'Find an Existing Value' button. Below this is a 'Search Criteria' section with several input fields, each with a 'begins with' dropdown menu. The 'Empl ID' field is highlighted with a red box. At the bottom of the search criteria are checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', along with a text input for 'Limit the number of results to (up to 300):' set to '300'. A 'Search' button is also highlighted with a red box, along with a 'Clear' button and links for 'Basic Search' and 'Save Search Criteria'.

Cardinal Homepage Benefits Administrator

**Employee/Dependent Information** ^

**Update Dependent/Beneficiary**

Update ABBRs

Maintain Certifications

Enroll in Benefits v

Enroll in Benefits v

Review Employee Benefits v

Benefits Management v

Benefits Configuration v

### Update Dependent/Beneficiary

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 v

Name begins with v

Last Name begins with v

Second Last Name begins with v

Alternate Character Name begins with v

Middle Name begins with v

Include History  Correct History  Case Sensitive

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

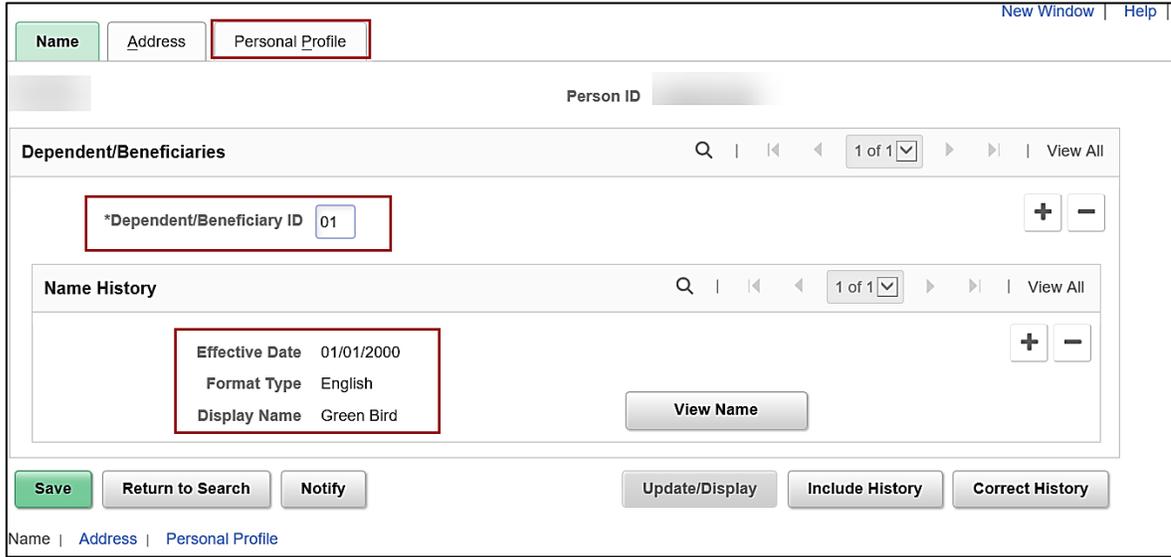
**Search** **Clear** [Basic Search](#) [Save Search Criteria](#)

4. Search for the applicable retiree by entering the Employee ID in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/retiree.

5. Click the **Search** button.

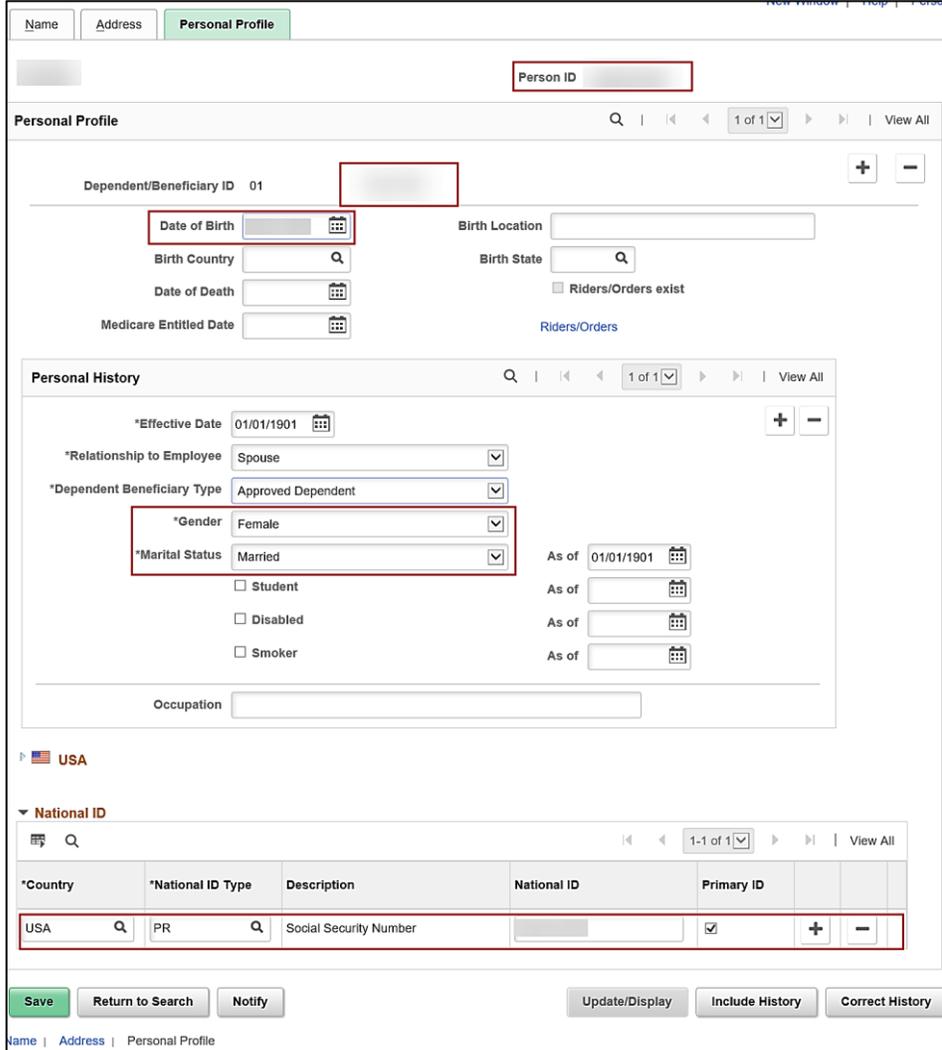
The **Dependent/Beneficiary** page displays with the **Name** tab displayed by default.



The screenshot shows a web application interface for managing dependents and beneficiaries. At the top, there are three tabs: "Name", "Address", and "Personal Profile". The "Personal Profile" tab is selected and highlighted with a red border. Below the tabs, there is a "Person ID" field. The main content area is divided into two sections: "Dependent/Beneficiaries" and "Name History". The "Dependent/Beneficiaries" section has a search bar and a list of dependents. One dependent is shown with a red border around its "\*Dependent/Beneficiary ID" field, which contains the value "01". The "Name History" section also has a search bar and a list of name history entries. One entry is shown with a red border around its "Effective Date", "Format Type", and "Display Name" fields, which contain the values "01/01/2000", "English", and "Green Bird" respectively. At the bottom of the page, there are several buttons: "Save", "Return to Search", "Notify", "Update/Display", "Include History", and "Correct History". The "Name" tab is also visible at the bottom left of the page.

6. Validate that the applicable dependent is displayed and then click the **Personal Profile** tab.

The **Personal Profile** tab displays.



The screenshot shows the 'Personal Profile' tab with the following fields and sections:

- Personal Profile Section:**
  - Person ID: [Red Box]
  - Dependent/Beneficiary ID: 01 [Red Box]
  - Date of Birth: [Red Box]
  - Birth Location: [Text Field]
  - Birth Country: [Text Field]
  - Birth State: [Text Field]
  - Date of Death: [Text Field]
  - Medicare Entitled Date: [Text Field]
  - Riders/Orders exist:
  - Riders/Orders: [Text Field]
- Personal History Section:**
  - \*Effective Date: 01/01/1901
  - \*Relationship to Employee: Spouse
  - \*Dependent Beneficiary Type: Approved Dependent
  - \*Gender: Female [Red Box]
  - \*Marital Status: Married [Red Box]
  - As of: 01/01/1901
  - As of: [Text Field]
  - As of: [Text Field]
  - As of: [Text Field]
  - Occupation: [Text Field]
- National ID Section:**

*Country	*National ID Type	Description	National ID	Primary ID
USA	PR	Social Security Number	[Red Box]	<input checked="" type="checkbox"/>

Buttons at the bottom: Save, Return to Search, Notify, Update/Display, Include History, Correct History.

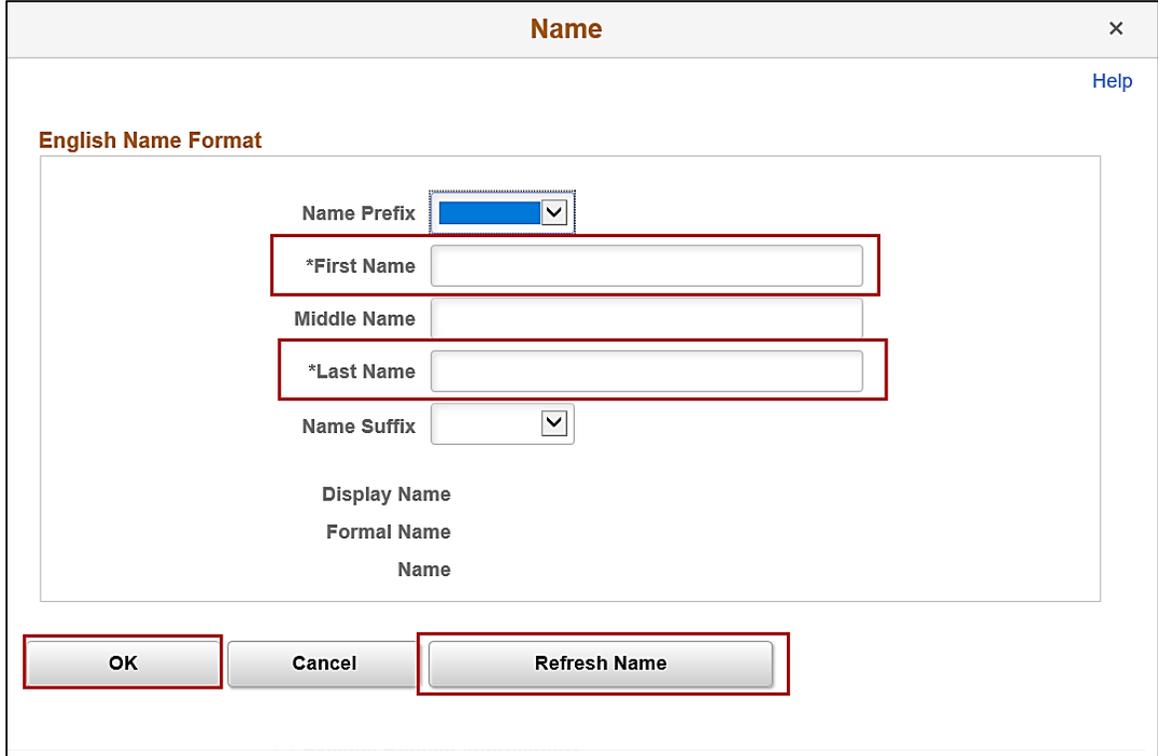
7. Capture the following information to provide to the HR Administrator:

- Person ID
- Name
- Date of Birth
- Social Security Number (SSN)

**Note:** The HR Administrator will need all of this information in order to complete the hire of the dependent that is under 65 and requires medical coverage.

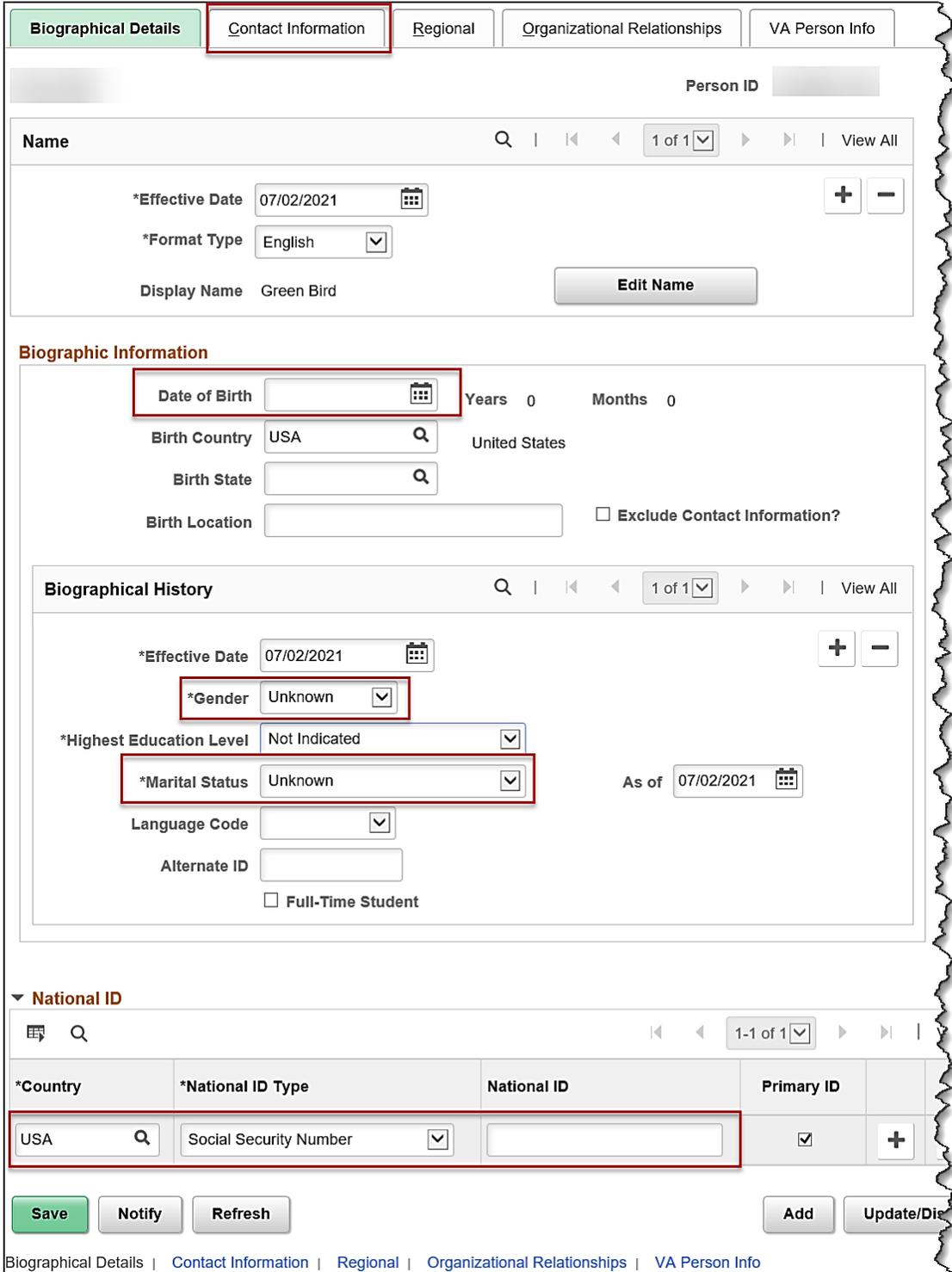


The **Name** page displays in a pop-up window.



5. Add the dependent's name information into the corresponding fields.
6. Click the **Refresh Name** button.
7. Click the **OK** button.

The **Modify a Person** page returns.



**Biographical Details** | **Contact Information** | Regional | Organizational Relationships | VA Person Info

Person ID [ ]

**Name** [ ] | 1 of 1 | View All

\*Effective Date: 07/02/2021 [ ] + -

\*Format Type: English [ ]

Display Name: Green Bird [ **Edit Name** ]

**Biographic Information**

**Date of Birth** [ ] [ ] Years 0 Months 0

Birth Country: USA [ ] United States

Birth State: [ ]

Birth Location: [ ]  Exclude Contact Information?

**Biographical History** [ ] | 1 of 1 | View All

\*Effective Date: 07/02/2021 [ ] + -

\*Gender: Unknown [ ]

\*Highest Education Level: Not Indicated [ ]

\*Marital Status: Unknown [ ] As of: 07/02/2021 [ ]

Language Code: [ ]

Alternate ID: [ ]  Full-Time Student

**National ID**

[ ] [ ] | 1-1 of 1 |

*Country	*National ID Type	National ID	Primary ID
USA [ ]	Social Security Number [ ]	[ ]	<input checked="" type="checkbox"/> [ + ]

[ **Save** ] [ **Notify** ] [ **Refresh** ] [ **Add** ] [ **Update/Di** ]

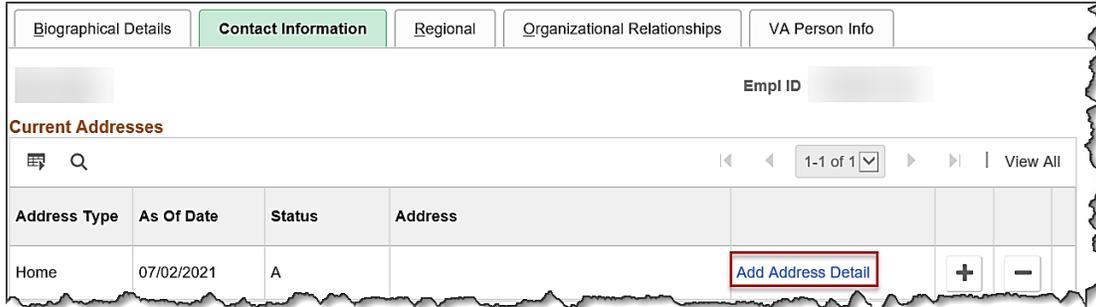
Biographical Details | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

8. Select the dependent's date of birth using the **Date of Birth** field **Calendar** icon.
9. Select the dependent's gender using the **Gender** field dropdown button.
10. Select the dependent's marital status using the **Marital Status** field dropdown button.

**BN361\_ORP Retiree Guide**

11. Within the **National ID** section, enter the dependent's Social Security Number (SSN) in the **National ID** field.
12. Click the **Contact Information** tab.

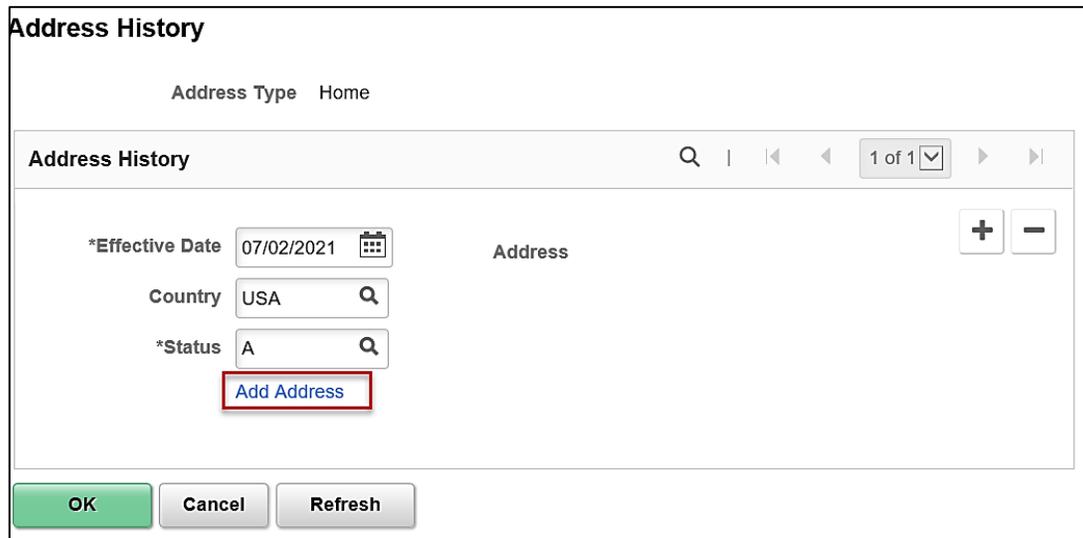
The **Contact Information** tab displays.



Address Type	As Of Date	Status	Address
Home	07/02/2021	A	

13. Click the **Add Address Detail** link.

The **Address History** page displays.



Address History

Address Type Home

\*Effective Date 07/02/2021

Country USA

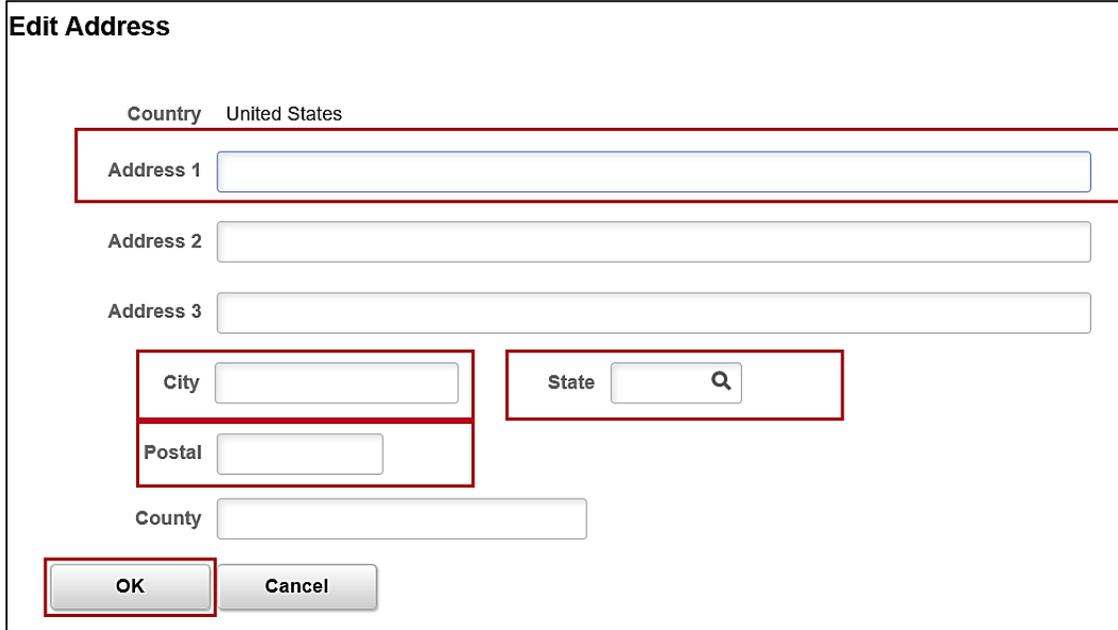
\*Status A

[Add Address](#)

OK Cancel Refresh

14. Click the **Add Address** link.

The **Edit Address** page displays.



**Edit Address**

Country United States

Address 1

Address 2

Address 3

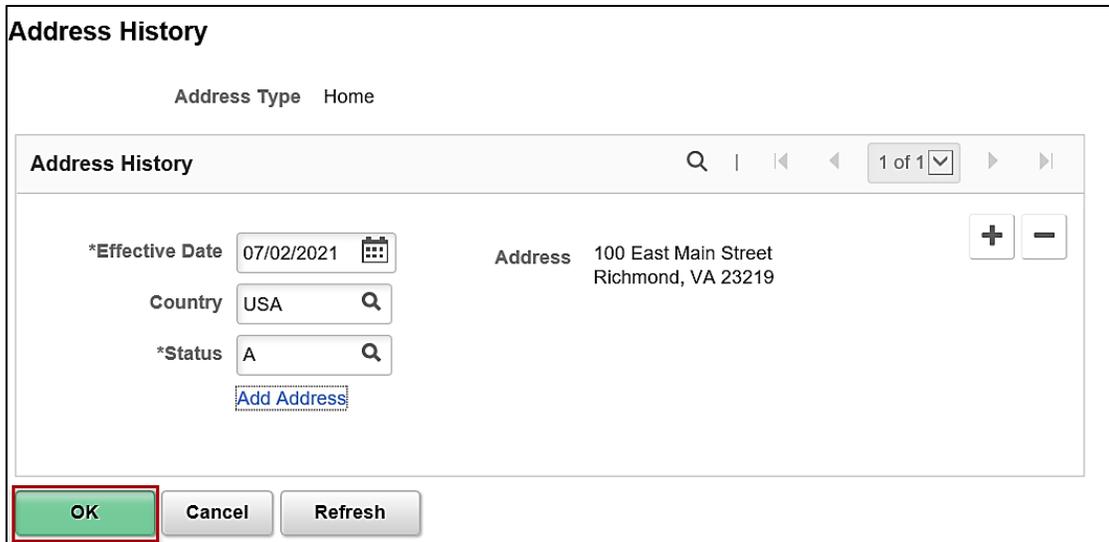
City  State

Postal

County

15. Enter the dependent's address information into the corresponding fields and then click the **OK** button.

The **Address History** page displays with the address information.



**Address History**

Address Type Home

Address History  | << < 1 of 1 > >>

\*Effective Date 07/02/2021  Address 100 East Main Street  
Richmond, VA 23219

Country USA

\*Status A

[Add Address](#)

16. Click the **OK** button.

The **Contact Information** tab returns.

Biographical Details	Contact Information	Regional	Organizational Relationships	VA Person Info
				Empl ID
<b>Current Addresses</b>				
<input type="text"/> <input type="text"/> 1-1 of 1 <input type="button" value="View All"/>				
Address Type	As Of Date	Status	Address	
Home	07/02/2021	A	100 East Main Street Richmond, VA 23219	<a href="#">Edit/View Address Detail</a> <input type="button" value="+"/> <input type="button" value="-"/>
<b>Phone Information</b>				
<input type="text"/> <input type="text"/> 1-1 of 1 <input type="button" value="View All"/>				
*Phone Type	Telephone	Extension	Preferred	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<b>Email Option Selection</b>				
<input type="radio"/> Agency Provided Email <input type="radio"/> Pending Agency Provided Email <input checked="" type="radio"/> Employee Provided Email				
<b>Email Addresses</b>				
*Email Type	*Email Address	Preferred		
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>
<b>Instant Message IDs</b> <input type="button" value="Help"/>				
<input type="text"/> <input type="text"/> 1-1 of 1 <input type="button" value="View All"/>				
*IM Protocol	*IM Domain	*Network ID	Preferred	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/> <input type="button" value="-"/>
<input type="button" value="Save"/> <input type="button" value="Notify"/> <input type="button" value="Refresh"/> <input type="button" value="Add"/> <input type="button" value="Update/Display"/> <input type="button" value="Include History"/> <input type="button" value="Correct History"/>				
<a href="#">Biographical Details</a>   <a href="#">Contact Information</a>   <a href="#">Regional</a>   <a href="#">Organizational Relationships</a>   <a href="#">VA Person Info</a>				

17. Complete the **Phone Information** section by selecting the applicable phone type and entering the dependent's phone number.
18. Within the **Email Option Selection** section, click the **Employee Provided Email** radio button.
19. Complete the **Email Addresses** section by selecting the applicable email type (Personal) and entering the dependent's email address.  
**Note:** This email address will be what is used when registering for access to Cardinal. It is important for this to be populated with the personal email address provided by the retiree for their dependent.
20. Click the **VA Person Info** tab.

The **VA Person Info** tab displays.



Biographical Details | Contact Information | Regional | **Organizational Relationships** | VA Person Info

Person ID [Redacted]

Power Of Attorney [Text Field]

Preferred Pronoun [Dropdown]

Linked Participant EmplID [Text Field]

Preferred Gender [Dropdown]

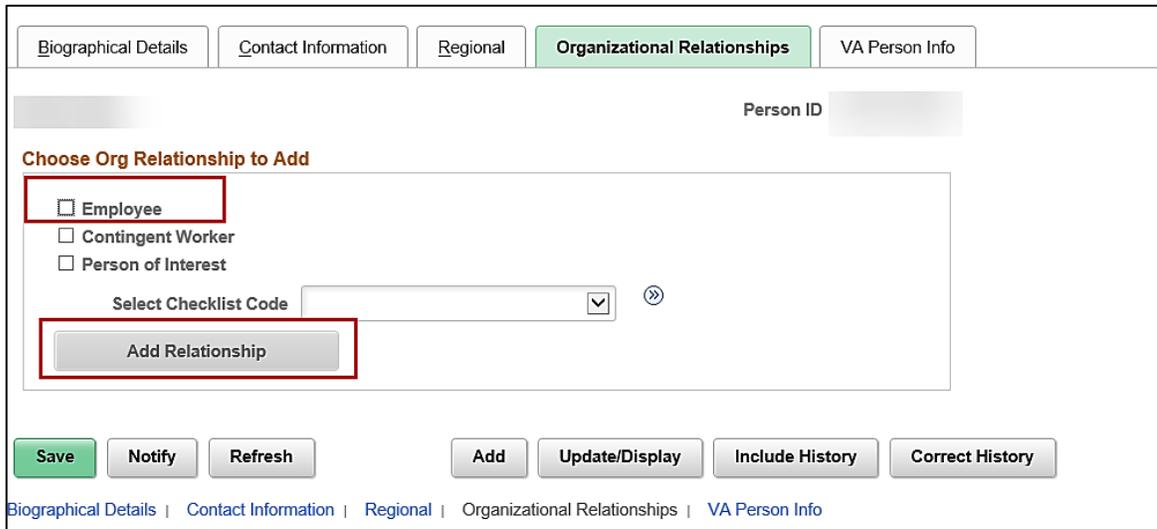
Save | Notify | Refresh | Add | Update/Display | Include History | Correct History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

21. Enter the Retiree's Empl ID (not the dependent Empl ID that was just created) in the **Linked Participant EmplID** field. This will link the Retiree with the dependent.

22. Click the **Organizational Relationship** tab.

The **Organizational Relationship** tab displays.



Biographical Details | Contact Information | Regional | **Organizational Relationships** | VA Person Info

Person ID [Redacted]

**Choose Org Relationship to Add**

Employee

Contingent Worker

Person of Interest

Select Checklist Code [Dropdown] [Right Arrow]

Add Relationship

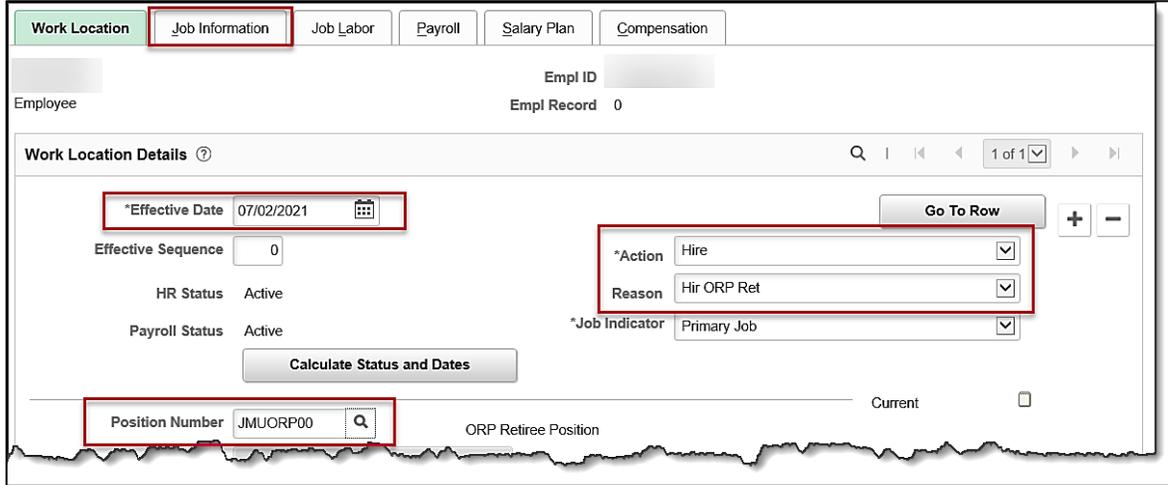
Save | Notify | Refresh | Add | Update/Display | Include History | Correct History

[Biographical Details](#) | [Contact Information](#) | [Regional](#) | [Organizational Relationships](#) | [VA Person Info](#)

23. Select the **Employee** checkbox option within the **Choose Org Relationship to Add** section.

24. Click the **Add Relationship** button.

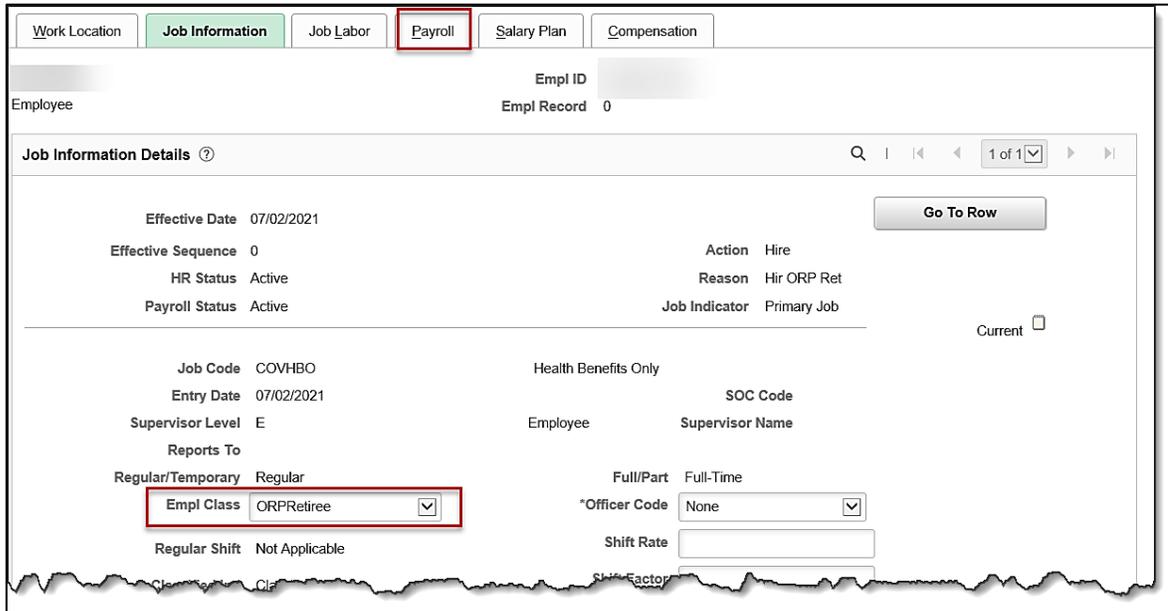
The **Work Location** tab displays.



**Note:** The **Effective Date** and the **Action** fields will default into the **Work Location** tab.

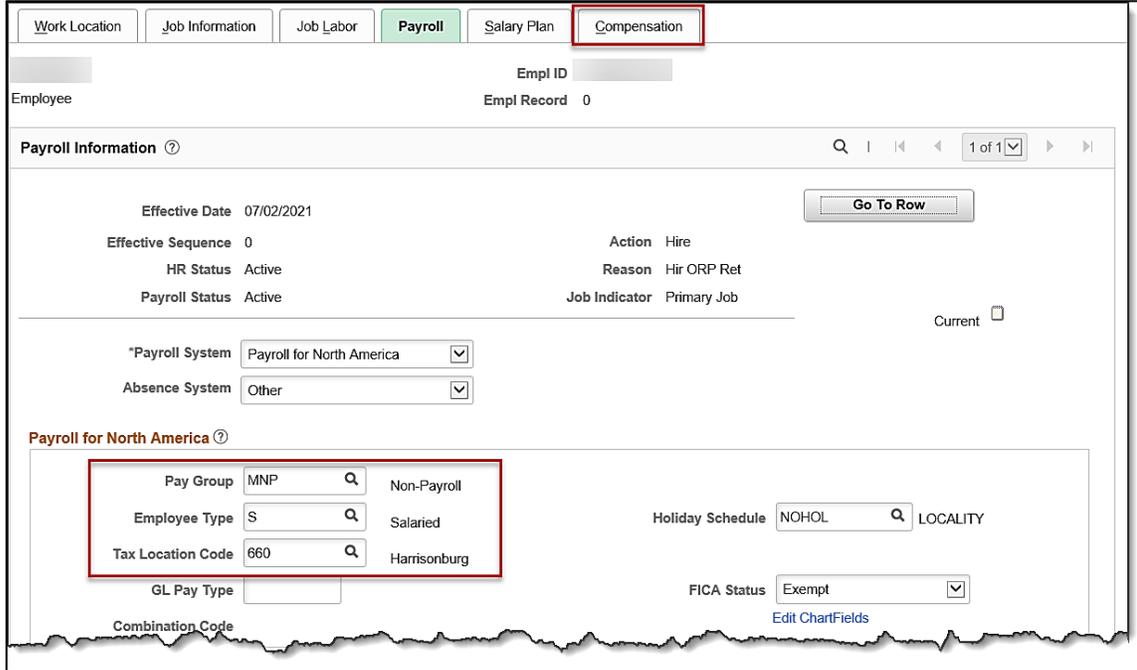
25. Select the “HIR ORP Ret” list item using the **Reason** field dropdown button.
26. Search for or enter your agency’s ORP Retiree Position using the **Position Number** field.
27. Click the **Job Information** tab.

The **Job Information** tab displays.



28. Select the “ORPRetiree” list item using the **Empl Class** field dropdown button.
29. Click the **Payroll** tab.

The **Payroll** tab displays.



Work Location | Job Information | Job Labor | **Payroll** | Salary Plan | Compensation

Empl ID [redacted]  
Employee [redacted] | Empl Record 0

Payroll Information ?

Effective Date 07/02/2021 Go To Row

Effective Sequence 0 | Action Hire  
HR Status Active | Reason Hir ORP Ret  
Payroll Status Active | Job Indicator Primary Job

\*Payroll System Payroll for North America  
Absence System Other

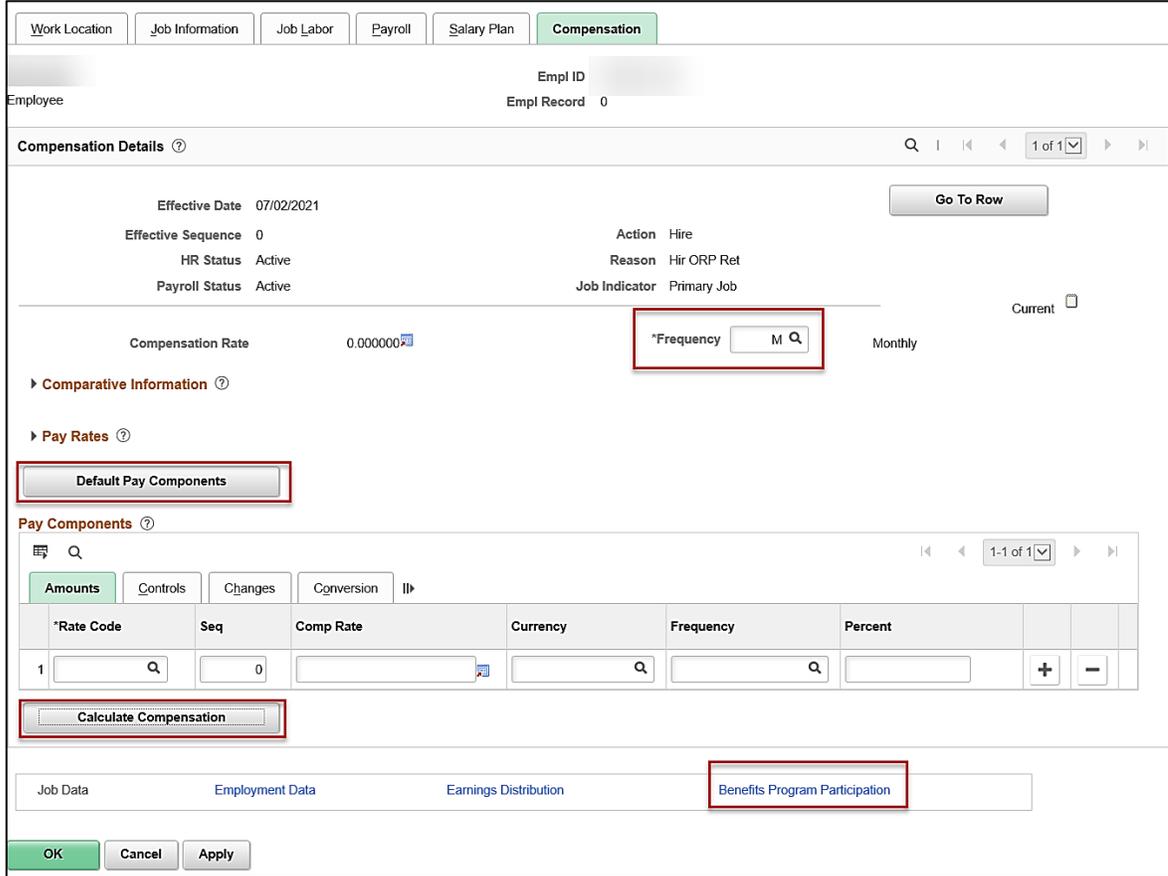
Payroll for North America ?

Pay Group MNP Non-Payroll  
Employee Type S Salaried  
Tax Location Code 660 Harrisonburg

Holiday Schedule NOHOL LOCALITY  
FICA Status Exempt  
GL Pay Type  
Combination Code  
[Edit ChartFields](#)

30. Select the “MNP” list item using the **Pay Group Search and Select** icon (magnifying glass). This is the Non-Payroll Pay Group.
31. Select the applicable tax location using the **Tax Location Code Search and Select** icon (magnifying glass).
32. Click the **Compensation** tab.

The **Compensation** tab displays.



The screenshot shows the 'Compensation' tab with the following details:

- Effective Date: 07/02/2021
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- Action: Hire
- Reason: Hir ORP Ret
- Job Indicator: Primary Job
- Compensation Rate: 0.000000
- \*Frequency: M (highlighted with a red box)
- Monthly
- Current:
- Buttons: **Default Pay Components** (highlighted with a red box), **Calculate Compensation** (highlighted with a red box)
- Pay Components table:
 

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent		
1	0					+	-
- Bottom navigation: Job Data, Employment Data, Earnings Distribution, **Benefits Program Participation** (highlighted with a red box)
- Buttons: OK, Cancel, Apply

33. The **Frequency** field defaults to “A” for Annual. Update the pay frequency to “M” Monthly using the **Frequency Search and Select** icon (magnifying glass).

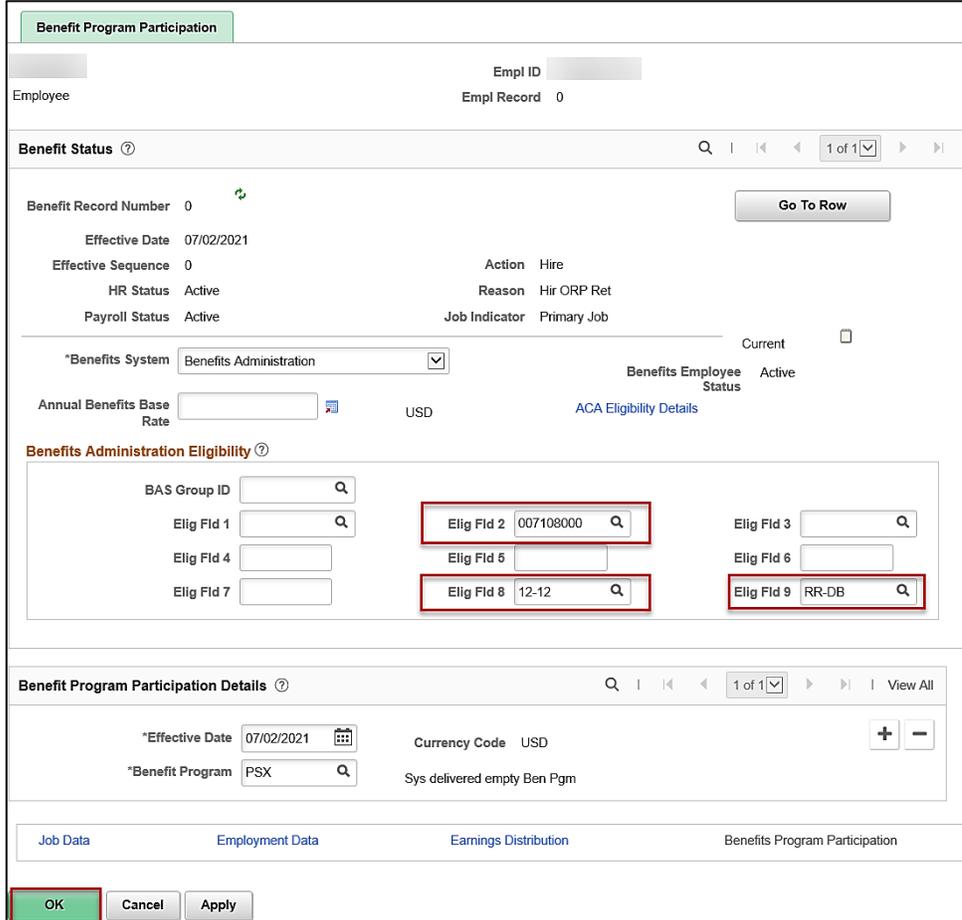
34. Click the **Defaults Pay Components** button.

**Note:** The Compensation Rate should be “0”. No additional **Pay Component** fields should be entered.

35. Click the **Calculate Compensation** button.

36. Click the **Benefits Program Participation** link.

The **Benefit Program Participation** page displays.



The screenshot displays the 'Benefit Program Participation' interface. At the top, it shows 'Benefit Program Participation' and 'Empl ID'. Below this, there are fields for 'Employee' and 'Empl Record 0'. The 'Benefit Status' section includes a search bar and a 'Go To Row' button. Key details include: 'Benefit Record Number 0', 'Effective Date 07/02/2021', 'Effective Sequence 0', 'Action Hire', 'Reason Hir ORP Ret', 'HR Status Active', 'Payroll Status Active', 'Job Indicator Primary Job', and 'Benefits System Benefits Administration'. The 'Benefits Administration Eligibility' section contains several fields: 'BAS Group ID', 'Elig Fld 1-7', 'Elig Fld 2' (with value 007108000), 'Elig Fld 3', 'Elig Fld 5', 'Elig Fld 6', 'Elig Fld 8' (with value 12-12), and 'Elig Fld 9' (with value RR-DB). The 'Benefit Program Participation Details' section shows 'Effective Date 07/02/2021', 'Currency Code USD', and 'Benefit Program PSX'. At the bottom, there are tabs for 'Job Data', 'Employment Data', 'Earnings Distribution', and 'Benefits Program Participation', along with 'OK', 'Cancel', and 'Apply' buttons.

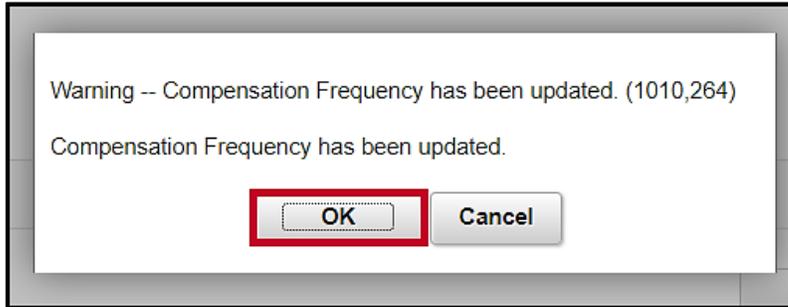
**Note:** Use the **Configuration Workbook** to complete **Eligibility Fields 2, 8, and 9** based on the appropriate scenarios for the ORP Retiree.

37. Select the applicable value for the **Eligibility 2** field using the **Search and Select** icon (magnifying glass).

**Note:** If the dependent is selecting to decline medical coverage permanently, select the value of "000000000". If the dependent is selecting medical coverage, select the value of "007108000".

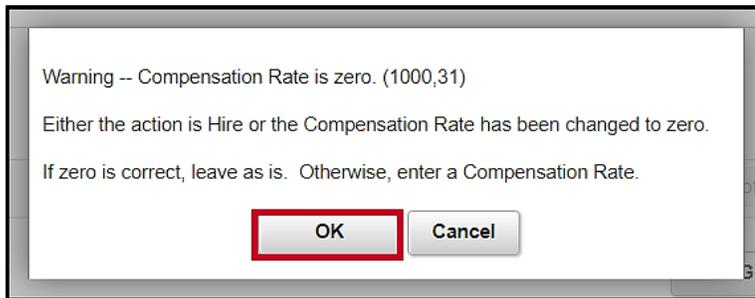
38. Select the applicable value for the **Eligibility 8** field using the **Search and Select** icon (magnifying glass). Example: "12-12".
39. Select the applicable value for the **Eligibility 9** field using the **Search and Select** icon (magnifying glass). Example: "LS-DB".
40. Click the **OK** button.

The following warning displays in a pop-up window.



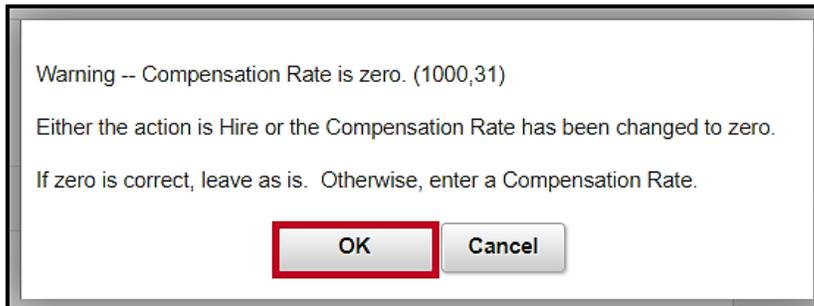
41. Click the **OK** button.

The following warning displays in a pop-up window.



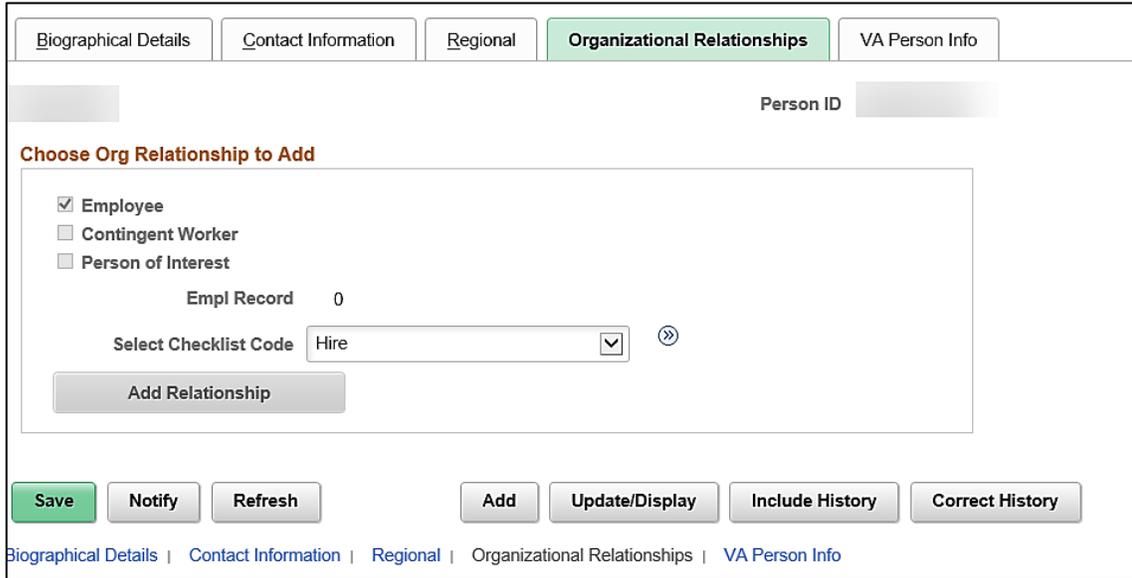
42. Click the **OK** button.

The following warning displays in a pop-up window.



43. Click the **OK** button.

The **Organization Relationships** page returns.



Biographical Details | Contact Information | Regional | **Organizational Relationships** | VA Person Info

Person ID

**Choose Org Relationship to Add**

Employee  
 Contingent Worker  
 Person of Interest

Empl Record 0

Select Checklist Code Hire

Add Relationship

Save Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | Organizational Relationships | VA Person Info

44. Click the **Save** button.

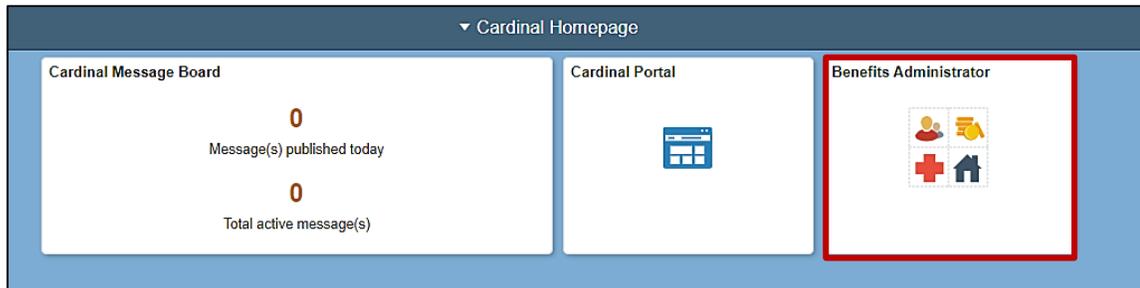
**Note:** The dependent now has an Employee ID. Provide the **Person ID** (Empl ID) to the BN Administrator for use when they enroll the spouse in the applicable benefits.

## Enroll the Spouse in Benefits

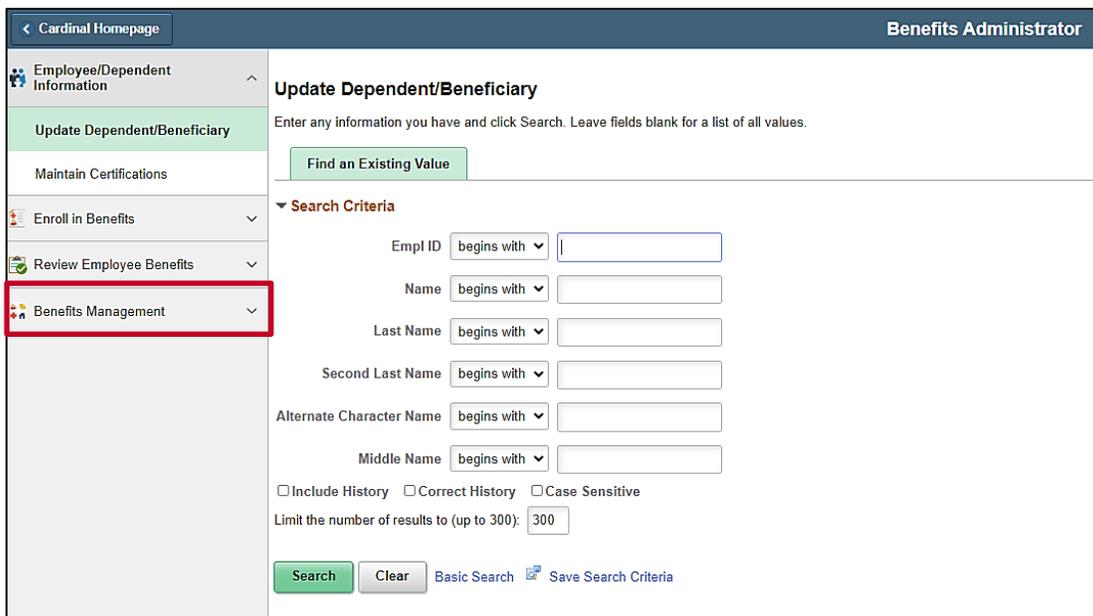
Next, enroll the spouse in Benefits. This transaction is completed by a BN Administrator **after** the Ben Admin process runs (every 4 hours).

1. Navigate to the **Cardinal Homepage**.

The **Cardinal Homepage** displays.



The **Update Dependent/Beneficiary** page displays.



**Update Dependent/Beneficiary**

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

Name  begins with

Last Name  begins with

Second Last Name  begins with

Alternate Character Name  begins with

Middle Name  begins with

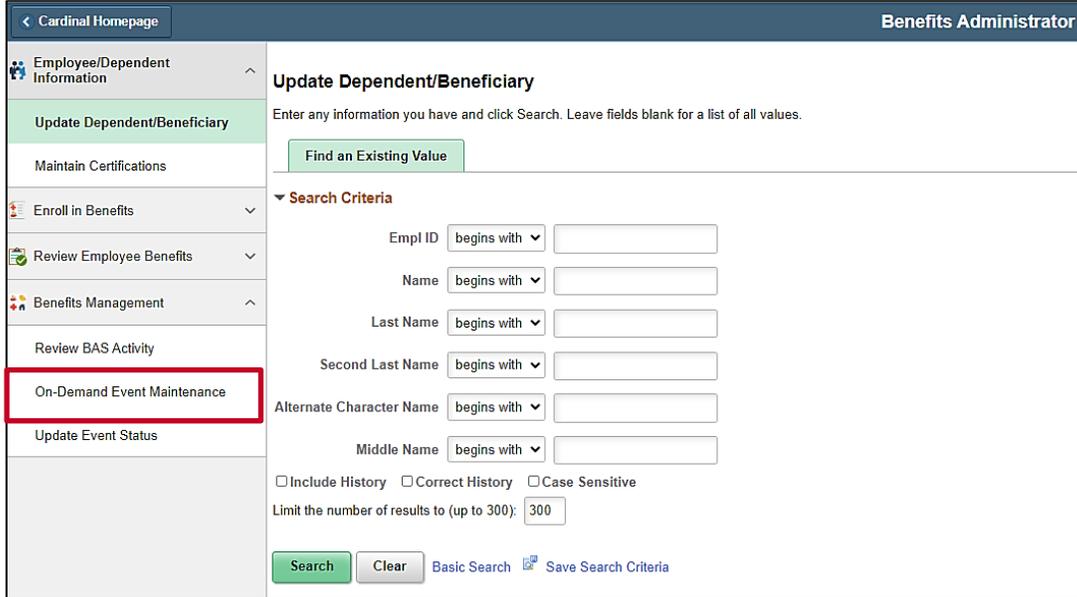
Include History  Correct History  Case Sensitive

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

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Click the **Benefits Management** menu item on the left-hand side of the screen.

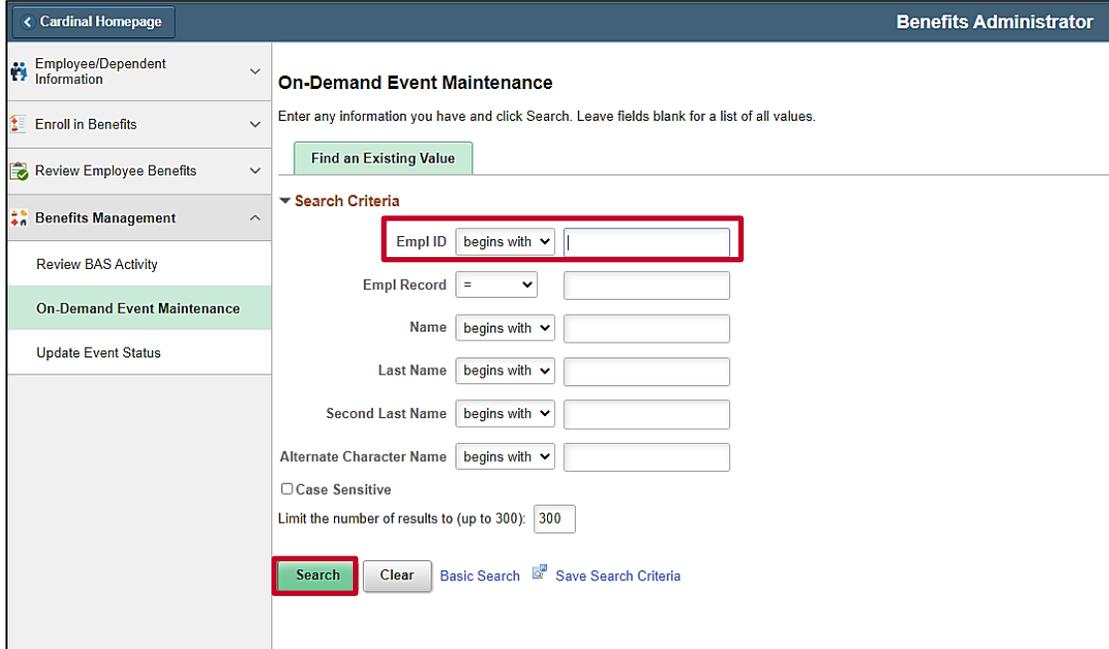
The **Benefits Management** menu expands.



The screenshot shows the 'Benefits Administrator' interface. On the left is a navigation menu with the following items: 'Employee/Dependent Information', 'Update Dependent/Beneficiary' (highlighted in green), 'Maintain Certifications', 'Enroll in Benefits', 'Review Employee Benefits', 'Benefits Management', 'Review BAS Activity', 'On-Demand Event Maintenance' (highlighted with a red box), and 'Update Event Status'. The main content area is titled 'Update Dependent/Beneficiary' and contains a search form. The form includes a 'Find an Existing Value' button, a 'Search Criteria' section with dropdown menus for 'Empl ID', 'Name', 'Last Name', 'Second Last Name', 'Alternate Character Name', and 'Middle Name', each with a 'begins with' dropdown. There are also checkboxes for 'Include History', 'Correct History', and 'Case Sensitive', and a 'Limit the number of results to (up to 300):' field set to '300'. At the bottom are 'Search' and 'Clear' buttons, along with links for 'Basic Search' and 'Save Search Criteria'.

3. Click the **On-Demand Event Maintenance** menu list item.

The **On-Demand Event Maintenance Search** page displays.



The screenshot shows the "On-Demand Event Maintenance" search interface. The left sidebar contains navigation options: "Employee/Dependent Information", "Enroll in Benefits", "Review Employee Benefits", "Benefits Management", "Review BAS Activity", "On-Demand Event Maintenance" (highlighted), and "Update Event Status". The main content area is titled "On-Demand Event Maintenance" and includes a "Find an Existing Value" button. Below this is the "Search Criteria" section with the following fields and options:

- Empl ID**: dropdown menu set to "begins with" and an empty text input field (highlighted with a red box).
- Empl Record**: dropdown menu set to "=" and an empty text input field.
- Name**: dropdown menu set to "begins with" and an empty text input field.
- Last Name**: dropdown menu set to "begins with" and an empty text input field.
- Second Last Name**: dropdown menu set to "begins with" and an empty text input field.
- Alternate Character Name**: dropdown menu set to "begins with" and an empty text input field.

Additional options include a "Case Sensitive" checkbox (unchecked) and a "Limit the number of results to (up to 300):" input field set to "300". At the bottom, there are buttons for "Search" (highlighted with a red box), "Clear", "Basic Search", and "Save Search Criteria".

4. Search for the applicable dependent by entering the Employee ID (Person ID) in the **Empl ID** field.

**Note:** You can also search by Employee Record or Name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee/dependent.

5. Click the **Search** button.

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The **On-Demand Event Maintenance** page displays for the applicable employee (dependent).

**On-Demand Event Maintenance**

Person ID [ ] Ben Record 0

---

Activity Date [ ] Source [ ] Empl Record 0

Pending Activities 0  Action

---

Event ID 1 Event Date 07/02/2021 Status Prepared Class HIR

Event Status Open for Processing

Run Date **Frequency**

Deduction Frequency  Annual Frequency

Entered 0 of 1

Errors 0   Finalize/Apply Defaults

Run Date

---

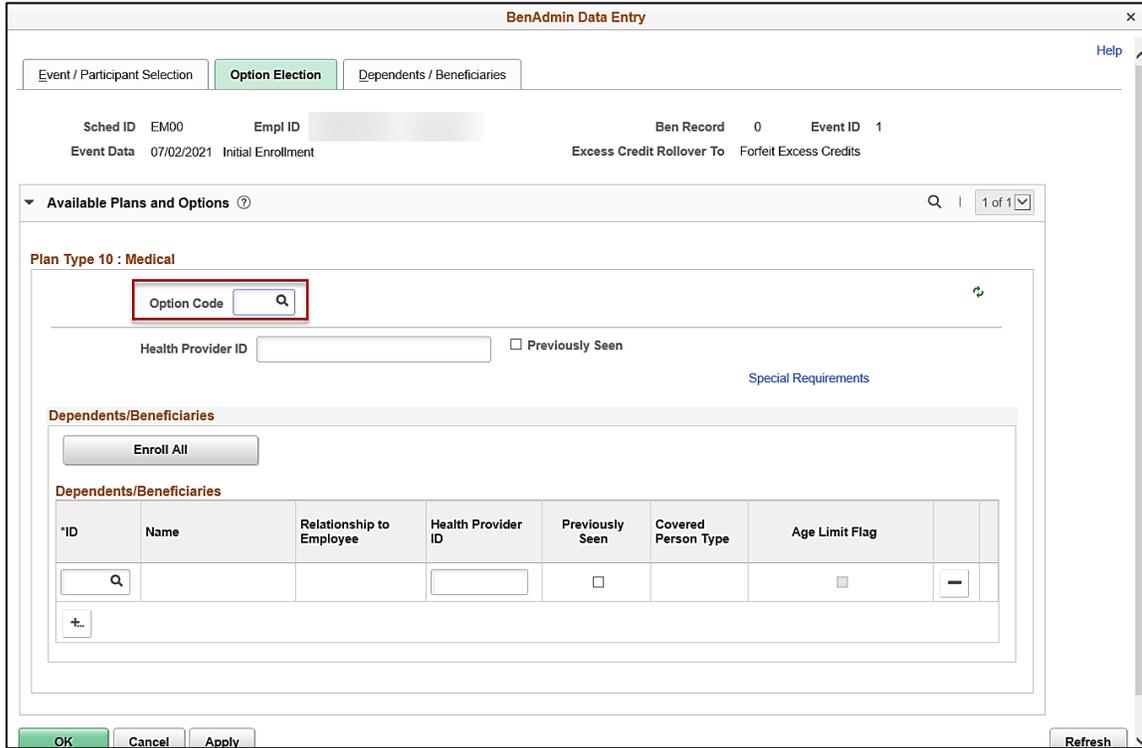
Process Indicator N  Normal Processing

**Note:** Since the Ben Admin Process has run in Cardinal since the time of hire, the event is already **prepared**.

6. Click the **Election Entry** button to make the benefit elections for the dependent.

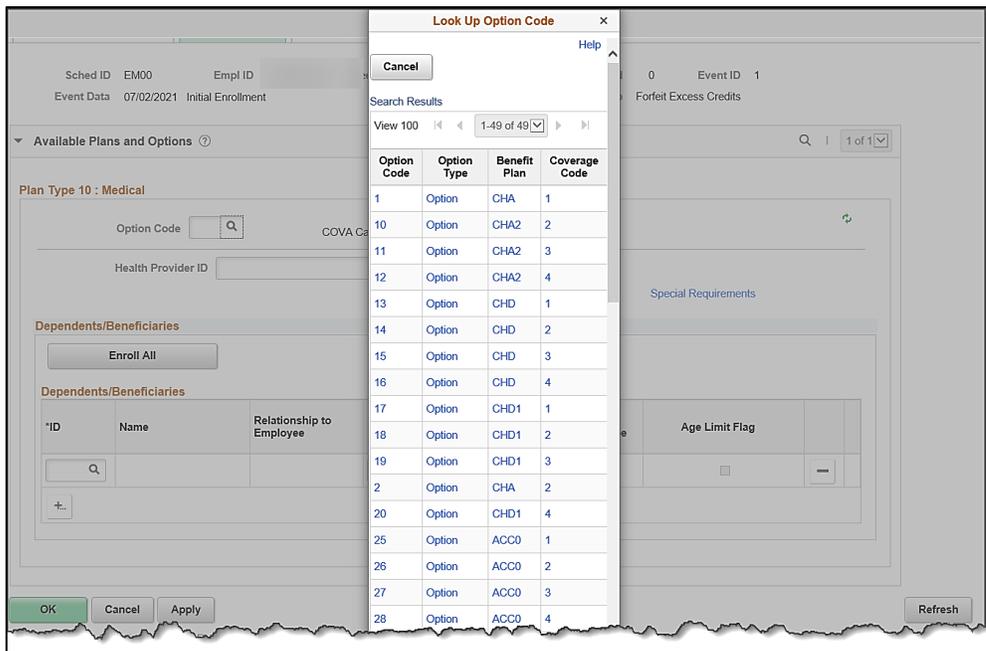
**BN361\_ORP Retiree Guide**

The **Election Entry** page displays with the **Option Election** tab displayed by default.



7. Within the **Plan Type 10: Medical** section, click the **Option Code Search and Select** icon (magnifying glass).

The **Look Up Option Code** page displays in a pop-up window.



Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	CHA	1
10	Option	CHA2	2
11	Option	CHA2	3
12	Option	CHA2	4
13	Option	CHD	1
14	Option	CHD	2
15	Option	CHD	3
16	Option	CHD	4
17	Option	CHD1	1
18	Option	CHD1	2
19	Option	CHD1	3
2	Option	CHA	2
20	Option	CHD1	4
25	Option	ACC0	1
26	Option	ACC0	2
27	Option	ACC0	3
28	Option	ACC0	4

8. Select a benefit plan with a **Coverage Code 1** for single coverage.

The **Election Entry** page returns.

**BenAdmin Data Entry**

Sched ID EM00    Empl ID [REDACTED]    Ben Record 0    Event ID 1

Event Data 07/02/2021 Initial Enrollment
Excess Credit Rollover To    Forfeit Excess Credits

▼ Available Plans and Options ?
Q | 1 of 1

**Plan Type 10 : Medical**

Option Code  Q
COVA Care + Expanded Dental (ACC2) (Single)

Health Provider ID 
 Previously Seen

[Special Requirements](#)

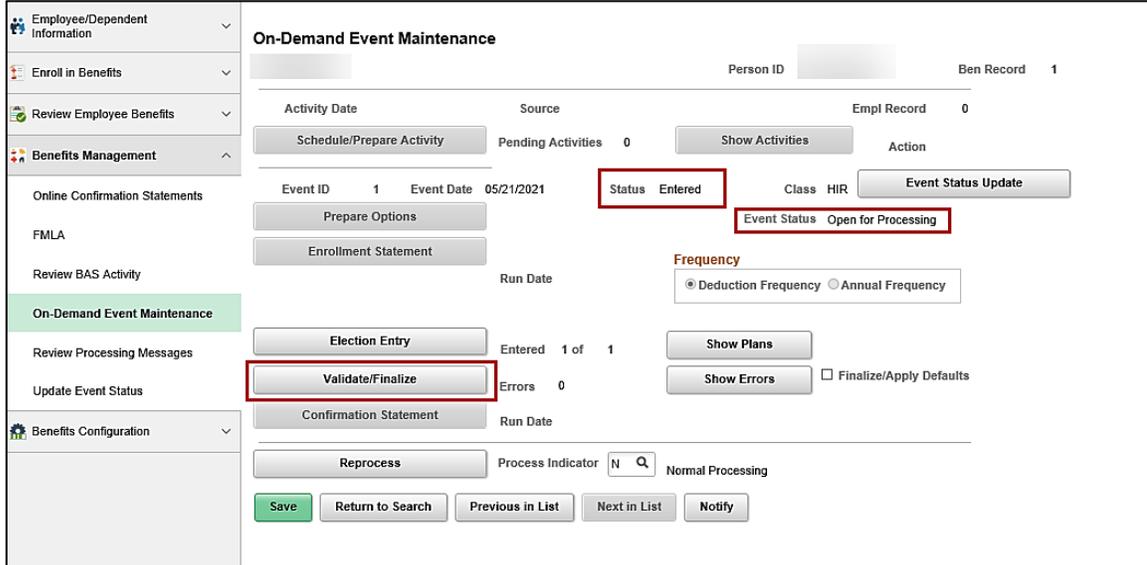
**Dependents/Beneficiaries**

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text" value="Q"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	-
<input type="button" value="+"/>							

Event / Participant Selection | Option Election | Dependents / Beneficiaries

9. Click the **OK** button.

The **On-Demand Event Maintenance** page returns.



The screenshot shows the 'On-Demand Event Maintenance' page for a specific event. The event details are as follows:

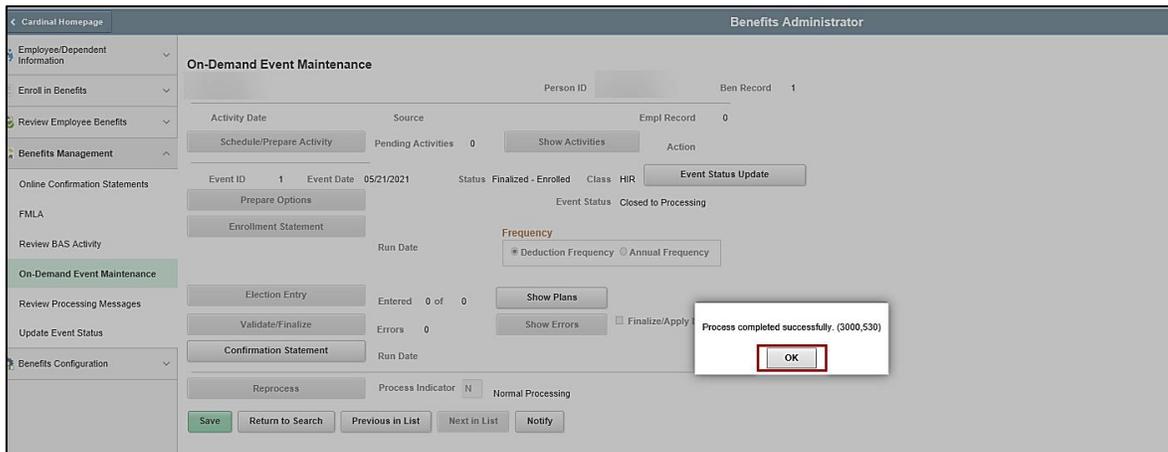
Field	Value
Event ID	1
Event Date	05/21/2021
Status	Entered
Class	HIR
Event Status	Open for Processing
Frequency	Deduction Frequency (selected)
Election Entry	Entered 1 of 1
Errors	0
Process Indicator	N
Normal Processing	Normal Processing

Buttons visible include: Schedule/Prepare Activity, Show Activities, Event Status Update, Prepare Options, Enrollment Statement, Election Entry, Validate/Finalize, Confirmation Statement, Reprocess, Save, Return to Search, Previous in List, Next in List, and Notify.

10. Confirm that the **Status** field is “Entered” and that the **Event Status** field is “Open for Processing”.
11. Click the **Validate/Finalize** button to validate the elections, close the event, and update the Base Benefits Tables.

**Note:** Once the event has been finalized, you will receive a message indicating that the process has completed successfully.

The page refreshes and the process confirmation message displays in a pop-up window.



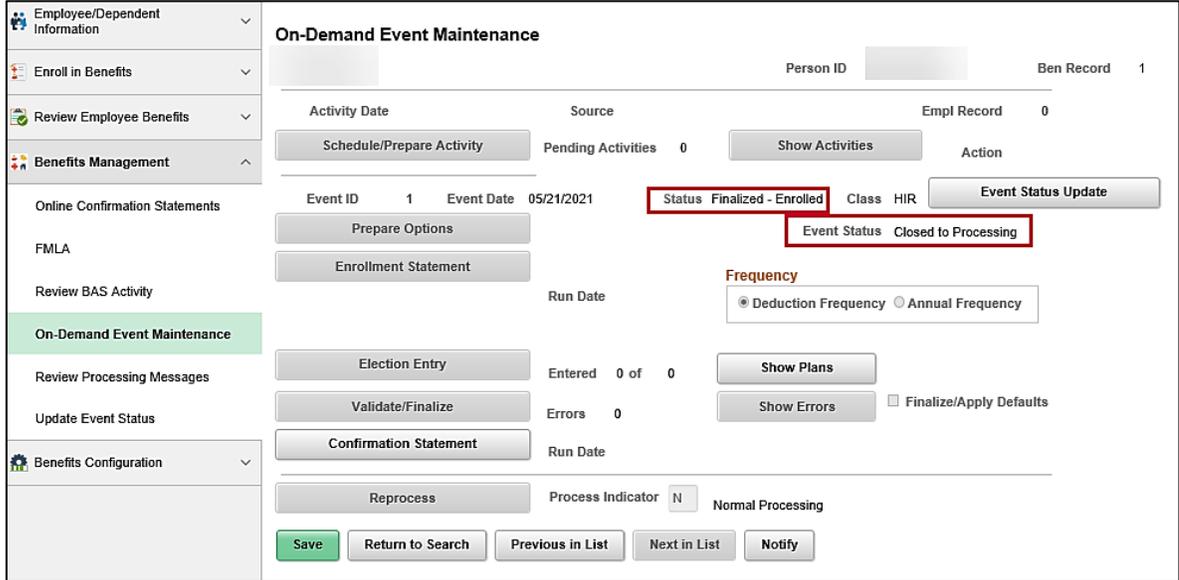
The screenshot shows the 'On-Demand Event Maintenance' page after the event has been finalized. The event details are as follows:

Field	Value
Event ID	1
Event Date	05/21/2021
Status	Finalized - Enrolled
Class	HIR
Event Status	Closed to Processing
Frequency	Deduction Frequency (selected)
Election Entry	Entered 0 of 0
Errors	0
Process Indicator	N
Normal Processing	Normal Processing

A pop-up window displays the message: "Process completed successfully. (3000,530)". The 'OK' button in the pop-up is highlighted with a red box.

12. Click the **OK** button.

The **On-Demand Event Maintenance** page returns.



**On-Demand Event Maintenance**

Person ID [ ] Ben Record 1

Activity Date [ ] Source [ ] Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 1 Event Date 05/21/2021 Status Finalized - Enrolled Class HIR Event Status Update

Prepare Options Event Status Closed to Processing

Enrollment Statement

Frequency  
 Deduction Frequency  Annual Frequency

Election Entry Entered 0 of 0 Show Plans

Validate/Finalize Errors 0 Show Errors  Finalize/Apply Defaults

Confirmation Statement Run Date [ ]

Reprocess Process Indicator N Normal Processing

Save Return to Search Previous in List Next in List Notify

- Confirm that the **Status** field is “Finalized – Enrolled” and the **Event Status** field is “Closed to Processing”.

Finally, link the dependent’s Employee ID (Person ID) to the **VA Person Info** tab of the retiree’s personal information.

- Navigate to the **Personal Data** page for the retiree using the following path:

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



The **VA Person Info** tab displays.



Biographical Details | Contact Information | Regional | **VA Person Info**

Person ID

Power Of Attorney

Preferred Pronoun

Preferred Gender

Linked Participant EmplID

**Save** Return to Search Previous in List Next in List Notify Refresh Add Update/Display Include History Correct History

Biographical Details | Contact Information | Regional | VA Person Info

18. Enter the dependent's Employee ID (Person ID) in the **Linked Participant EmplID** field.
19. Click the **Save** button.

This process is now complete.