

Creating and Completing a Life Event on behalf of an Employee Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to create and complete a manual Benefit Event (Life Event) on behalf of the employee.

This process is utilized when the employee does not initiate the qualifying Life Event through Employee Self-Service (ESS).

This Job Aid also contains sections that provide the step-by-step instructions utilized by an Agency BA to complete the following after the Benefit Event is completed and finalized:

- Viewing the employee’s benefits information to validate accuracy
- Viewing/printing the Confirmation Statement for the employee

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History	2
Creating and Processing a Life Event on behalf of an Employee (Adding Dependent(s)).....	3
Creating and Processing a Life Event on behalf of an Employee (Removing Dependent(s)).....	29
Creating and Processing a Birth Event on behalf of an Employee (with a tag along dependent and Flex Spending Dependent Care change)	49
Viewing the Employee’s Benefits Information.....	107
Viewing/Printing a Confirmation Statement	110



Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Steps 1 and 12; Section 2, after Steps 1 and 11; Section 3, after Steps 1, 11, 43, 54, 88, and 98; Section 4, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



BN361_Creating and Completing a Life Event on behalf of an Employee

Creating and Processing a Life Event on behalf of an Employee (Adding Dependent(s))

This section of the Job Aid should be referenced when creating and processing a Life Event on behalf of the employee wherein one or more dependents is being added to the employee’s coverage (marriage, birth, adoption, etc.). The steps included in this section of the Job Aid are based on the following example scenario.

Scenario: An employee got married on 12/16/2022. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 12/19/2022 to add their spouse as a dependent and enroll them in their benefits. Additionally, a stepchild will be added and enrolled in the employee’s benefits. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being added to the employee’s coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

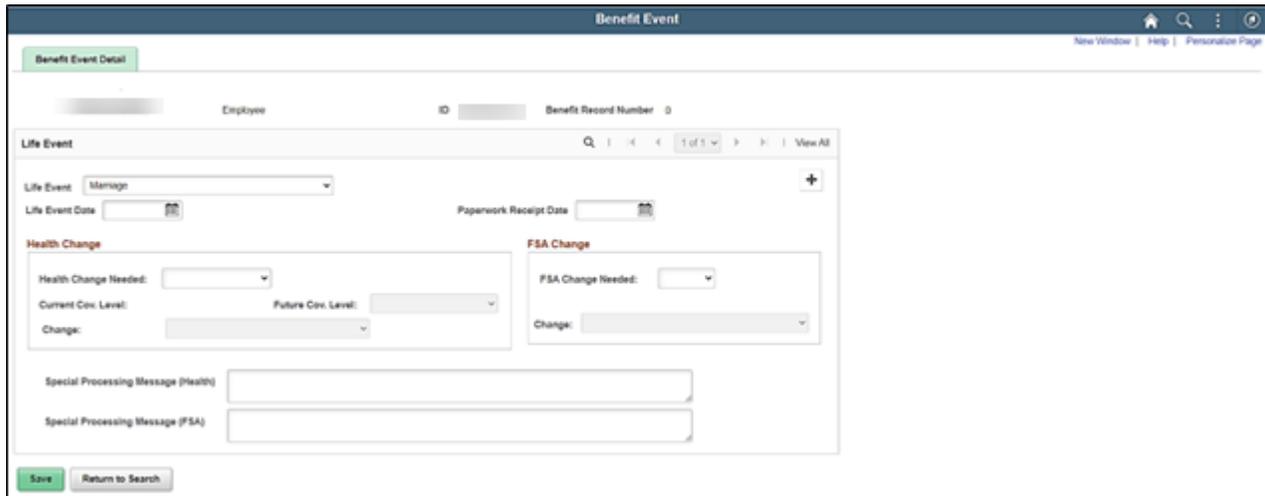
Table with 2 columns: Step, Action. Step 1: Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The Benefit Event Entry Find an Existing Value page displays.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter the employee’s Employee ID in the Search by field. Note: The other search by options available (Search by dropdown button) are Business Unit, Department, and Name. 
3.	Click the Search button. 

The **Benefit Event** page displays for the applicable employee.

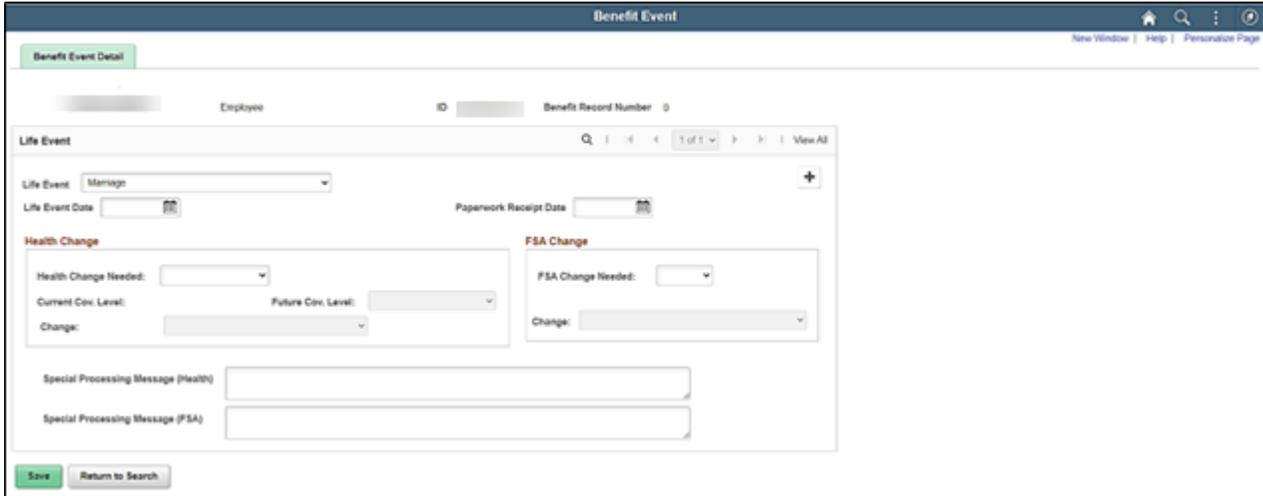


4.	Click the Life Event dropdown button and select the applicable life event (“Marriage” in this scenario). 
----	--

BN361_Creating and Completing a Life Event on behalf of an Employee

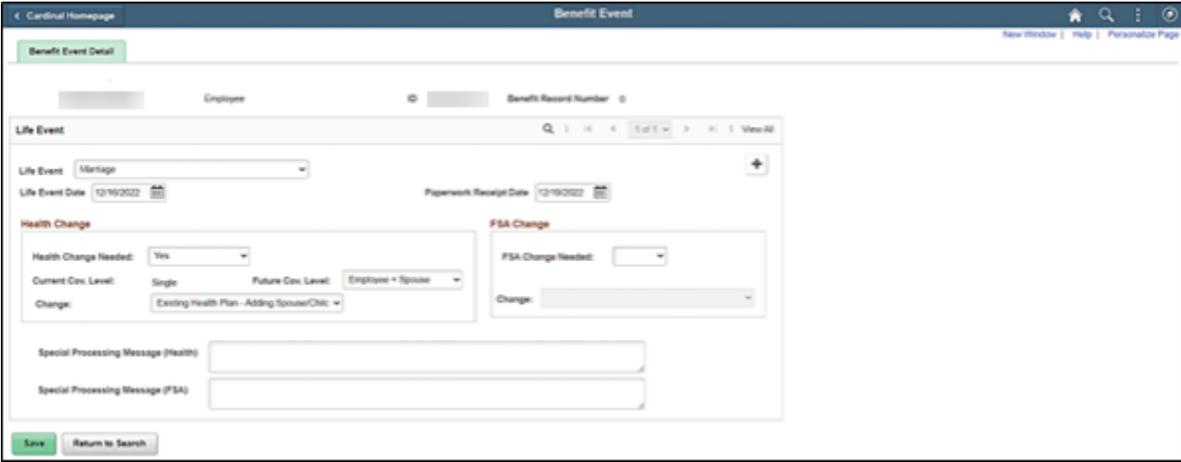
Step	Action
------	--------

The **Benefit Event** page redisplay with the selected Life Event.

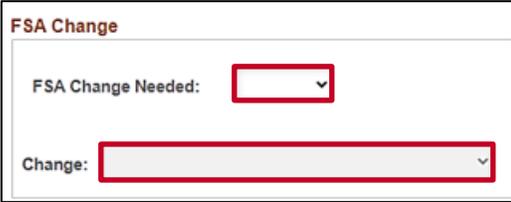


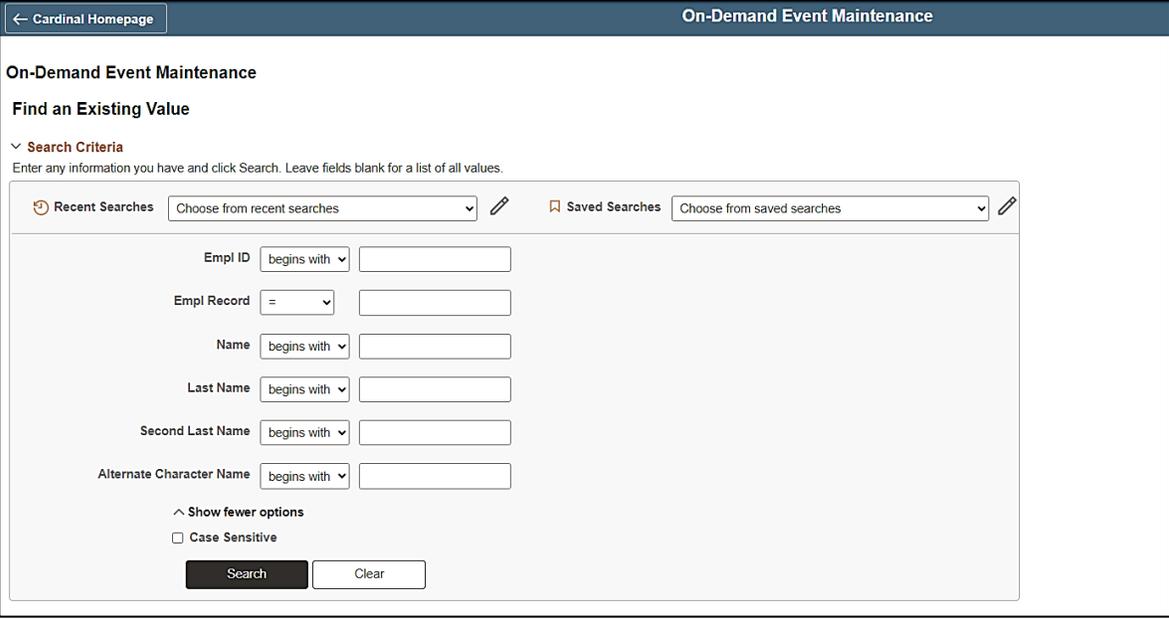
5.	Click the Life Event Date Calendar icon and select the applicable date. 
	This is the date of the actual event (marriage, birth, divorce, etc.).
6.	Click the Paperwork Receipt Date Calendar icon and select the applicable date. 
	This is the date that the Benefits Enrollment form was received from the employee.
7.	Click the Health Change Needed dropdown button and select “Yes”. 
	Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes” (i.e., this is a birth event, and the employee is already enrolled in “Family” coverage. However, a new dependent is being added (newborn)). If “Yes” is not selected, a Benefit Event will not be created.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The Benefit Event page refreshes.</p> 
	<p>The Current Cov. Level field auto-populates with the employee's current Health Plan enrollment coverage level.</p>
<p>8.</p>	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> 
	<p>The coverage levels available for selection are “Single, Employee”, “Employee + Spouse”, “Employee + CH (Child)”, and “Family”. Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed.</p>
<p>9.</p>	<p>Click the Change dropdown button and select “Existing Health Plan – Adding Spouse/Children”.</p> 
	<p>The selections available will vary based on the type of Life Event previously selected.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
10.	<p>Complete the fields within the FSA Change section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee's FSA elections will be made for this scenario).</p> 
11.	<p>Click the Save button.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions.</p> <p>If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
12.	<p>Navigate to the On-Demand Event Maintenance page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>

Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
<p>13.</p>	<p>Enter the employee’s Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee’s name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
<p>14.</p>	<p>Click the Search button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

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



15.	Review the Activity Date field.
-----	--

Activity Date 01/01/2023

i For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a marriage, so the **Activity Date** field defaults to the first day of the month following the date of marriage). Ensure that this date is accurate.

The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“MAR” for Marriage in this scenario).

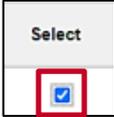
16.	Click the Show Activities button.
-----	--

Show Activities

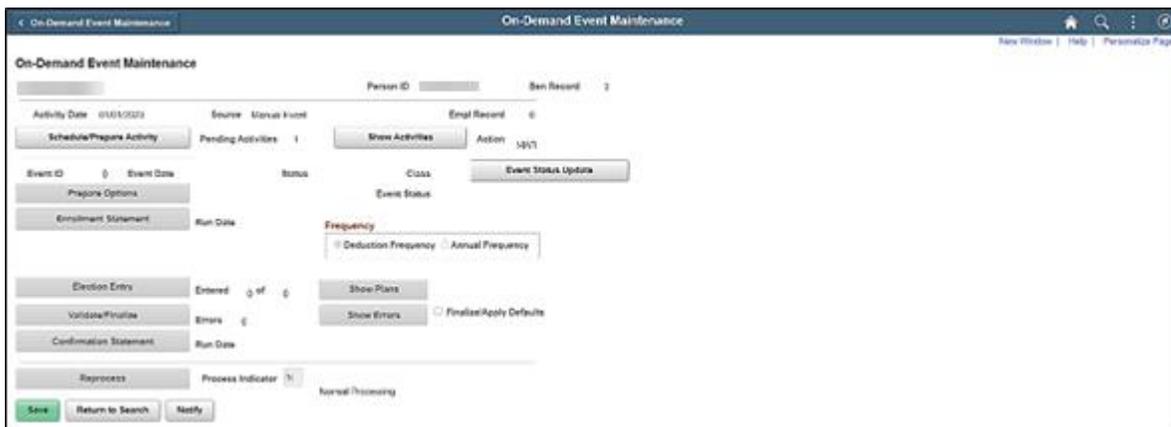
The **BAS Activity** page displays in a pop-up window.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
17.	Ensure that the Select checkbox option for the applicable Manual Benefit Event is selected. 
18.	Click the OK button. 

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



	If the Benefits Administration process has already run since the time the Benefit Event was created, the Pending Activities field will display a “0”. In this case, proceed to Step 21.
19.	If the Pending Activities field displays a “1”, click the Schedule/Prepare Activity button. 
	Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

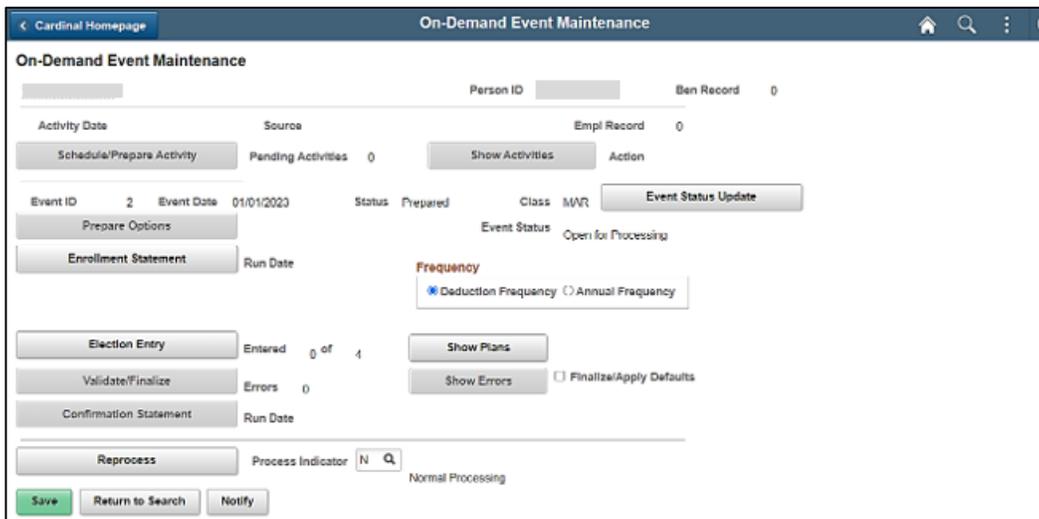
A **Confirmation** message displays in a pop-up window once the automated program completes.



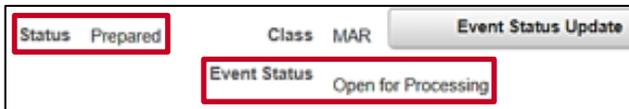
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
20.	Click the OK button. 

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



Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.

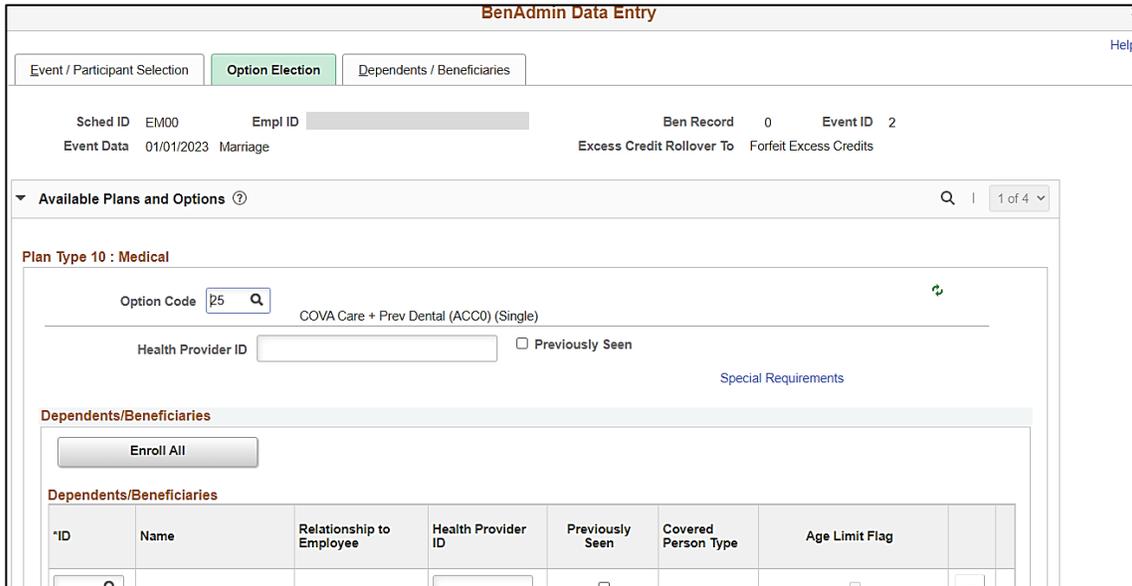
If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.

21.	Click the Election Entry button. 
-----	--

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.



First, select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and select the applicable Option Code based on the coverage being elected.



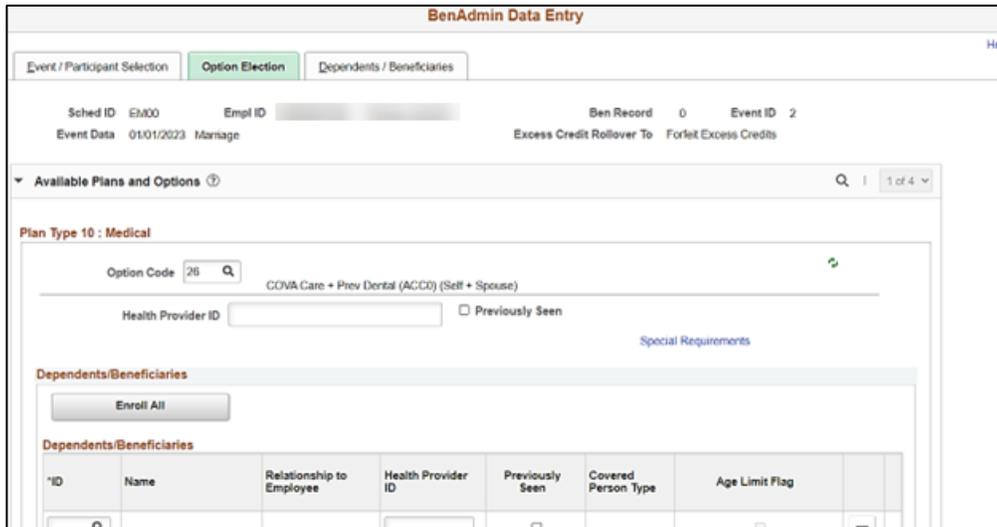
Select the same Benefit Plan that the employee is currently enrolled in but with the new Coverage Code (based on the employee's Benefits Enrollment form) by clicking the corresponding link in the **Option Code** column (Benefit Plan "ACC0" with Coverage Code "4" will be selected in this example as this is a marriage and the employee is adding the spouse and a stepchild).

The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child (except for Tricare), and 4 – Employee + 2 or More Dependents (Family – except for Tricare), 8 – Employee + Child(ren) (Tricare only), and 9 – Family (EE + SP + Child/ren for Tricare only).

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Option Election** tab redisplay.

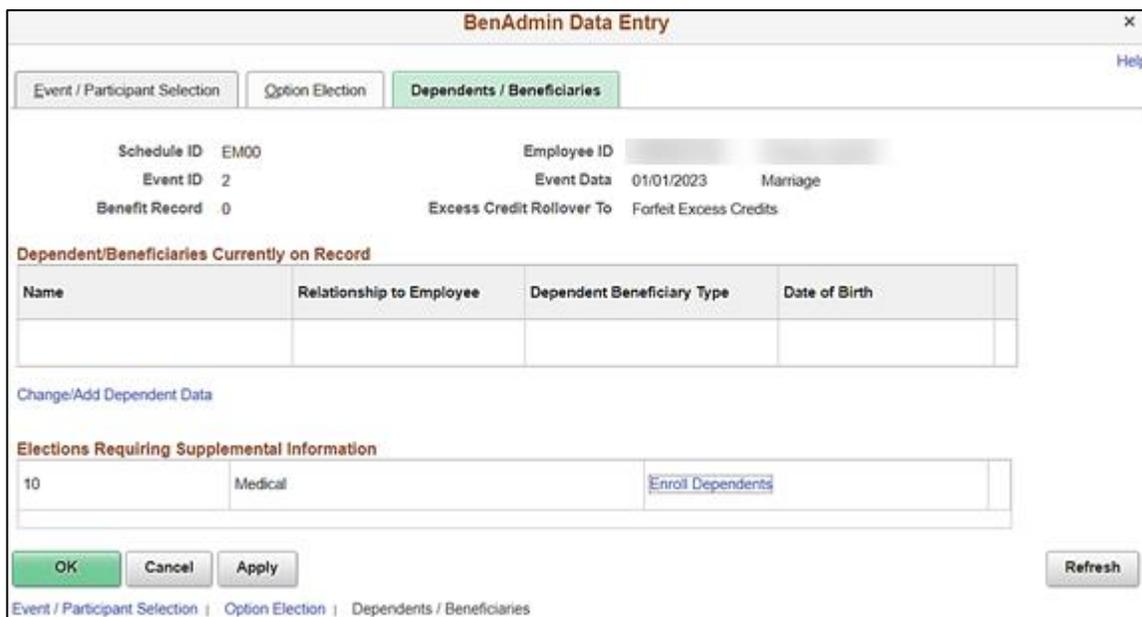


The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. It displays fields for 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Key information includes: Sched ID: EM00, Empl ID: [redacted], Ben Record: 0, Event ID: 2, Event Data: 01/01/2023 Marriage, and Excess Credit Rollover To: Forfeit Excess Credits. Under 'Available Plans and Options', 'Plan Type 10: Medical' is selected with Option Code 26. Below this, there are fields for 'Health Provider ID' and 'Previously Seen'. At the bottom, there is a table for 'Dependents/Beneficiaries' with columns: *ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag.

21. Next, add the new dependent(s). Click the **Dependents / Beneficiaries** tab.

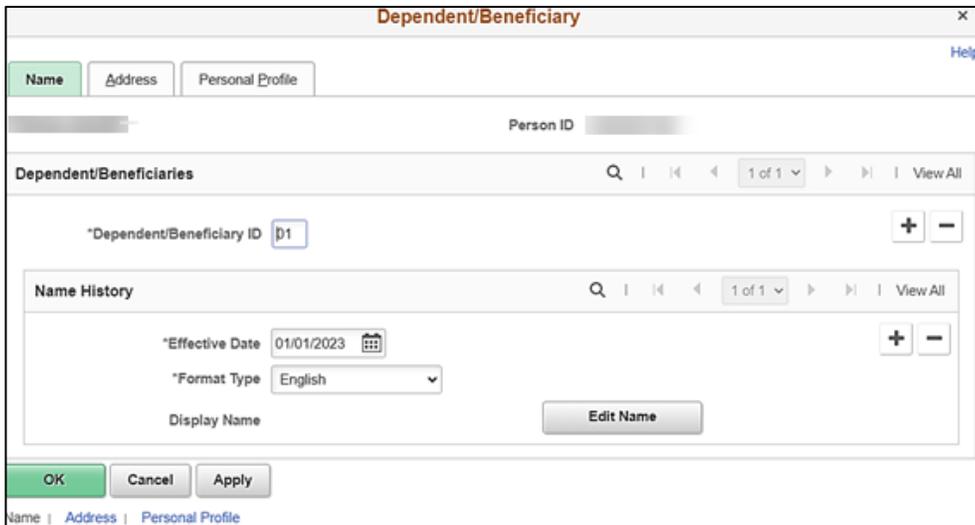


The **Dependent / Beneficiaries** tab displays.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. It displays fields for 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Key information includes: Schedule ID: EM00, Employee ID: [redacted], Event ID: 2, Event Data: 01/01/2023 Marriage, Benefit Record: 0, and Excess Credit Rollover To: Forfeit Excess Credits. Below this, there is a table for 'Dependent/Beneficiaries Currently on Record' with columns: Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. Underneath, there is a section for 'Elections Requiring Supplemental Information' with a table containing one row: 10, Medical, and an 'Enroll Dependents' link. At the bottom, there are buttons for 'OK', 'Cancel', 'Apply', and 'Refresh'.

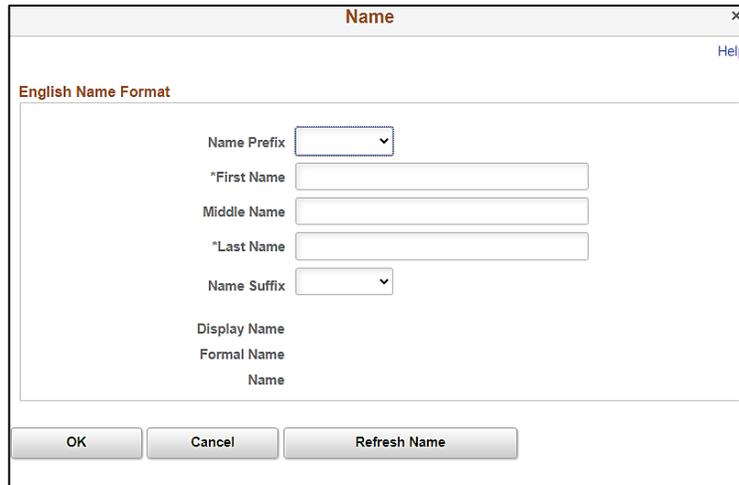
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
22.	Click the Change/Add Dependent Data link. 
<p>The Dependent/Beneficiary page displays in a pop-up window with the Name tab displayed by default.</p> 	
	<p>For Life Events, the Effective Date field defaults to the date that the coverage will begin (in this scenario, the Life Event is a marriage, so the Effective Date field defaults to the first day of the month following the date of marriage). Do not change this date as it must match the Event Date or the system will not recognize this dependent as eligible for coverage. The Dependent/Beneficiary ID field will default to the next available Dependent/Beneficiary ID number (“01” in this scenario) and increment by 1 for each additional dependent subsequently added.</p>
23.	Click the Edit Name button. 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

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




At a minimum, enter the dependent's first and last name in the corresponding fields. The **Name Prefix**, **Middle Name**, and **Name Suffix** fields are optional but should be entered as applicable.

24. Click the **Refresh Name** button.



The **Name** page refreshes.




The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.

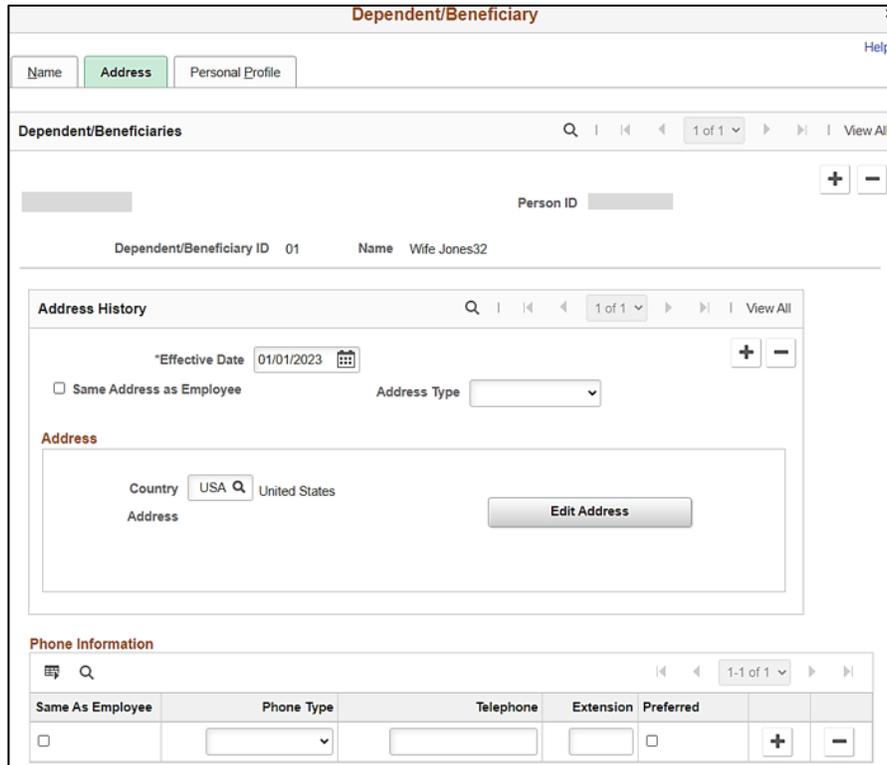
BN361_Creating and Completing a Life Event on behalf of an Employee

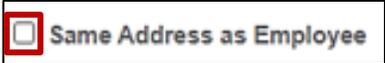
Step	Action
25.	Click the OK button. <div data-bbox="256 420 873 483" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 2px 10px;">OK</div> <div style="padding: 2px 10px;">Cancel</div> <div style="padding: 2px 10px;">Refresh Name</div> </div> </div>
	The Name tab redisplay. <div data-bbox="289 567 1347 1144" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <div style="text-align: right; font-weight: bold; color: #A52A2A;">Dependent/Beneficiary</div> <div style="text-align: right; font-size: small; color: #000080;">Help</div> <div style="display: flex; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> <div style="border: 1px solid #ccc; padding: 2px 5px; background-color: #E0FFE0;">Name</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Address</div> <div style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Personal Profile</div> </div> <div style="margin-bottom: 5px;"> <div style="border: 1px solid #ccc; width: 100%; height: 15px; background-color: #f0f0f0;"></div> <div style="text-align: right; font-size: small; color: #666;">Person ID </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Dependent/Beneficiaries Q < > 1 of 1 View All </div> <div style="margin-top: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> *Dependent/Beneficiary ID 01 + - </div> </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Name History Q < > 1 of 1 View All </div> <div style="margin-top: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> *Effective Date 01/01/2023 + - </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> *Format Type English v </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> Display Name Wife Jones32 Edit Name </div> </div> </div> <div style="display: flex; justify-content: space-between; align-items: center; margin-top: 5px;"> OK Cancel Apply </div> <div style="font-size: x-small; color: #666; margin-top: 5px;"> Name Address Personal Profile </div> </div> </div>
	The Display Name field auto-populates with the name information previously entered.
26.	Click the Address tab. <div data-bbox="256 1344 695 1407" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; gap: 10px;"> <div style="background-color: #E0FFE0; padding: 2px 10px;">Name</div> <div style="border: 2px solid red; padding: 2px 10px;">Address</div> <div style="padding: 2px 10px;">Personal Profile</div> </div> </div>

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Address** tab displays.



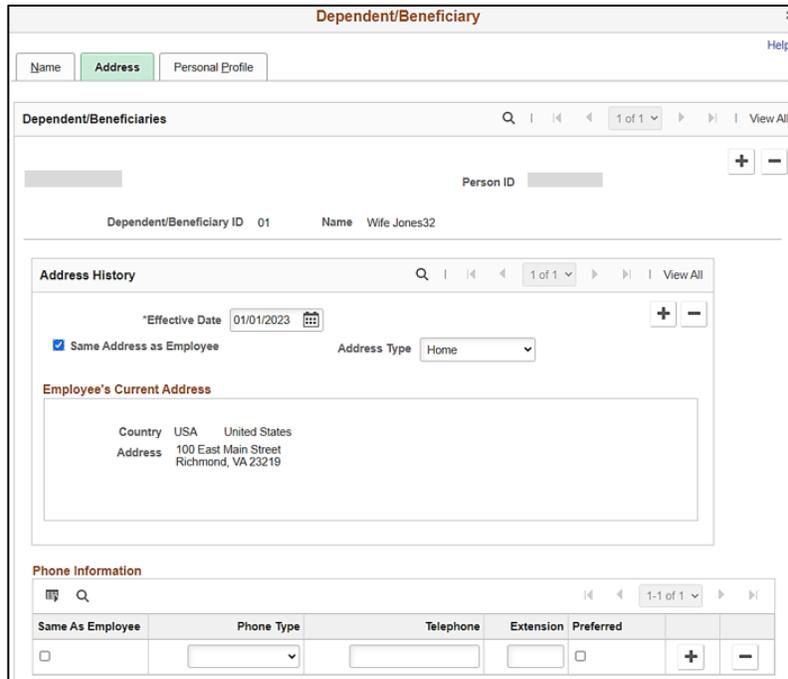
27.	Click the Same Address as Employee checkbox option (applicable for this scenario). 
-----	--

	The address information can be completed as applicable for the dependent by either selecting the applicable Address Type using the dropdown button provided and then clicking the Edit Address button (the Edit Address page will display in a pop-up window and the applicable address information can be entered). 
---	--

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Address** tab refreshes.



Dependent/Beneficiary

Name | **Address** | Personal Profile

Dependent/Beneficiaries

Person ID

Dependent/Beneficiary ID 01 Name Wife Jones32

Address History

*Effective Date 01/01/2023

Same Address as Employee Address Type Home

Employee's Current Address

Country USA United States
Address 100 East Main Street
Richmond, VA 23219

Phone Information

Same As Employee	Phone Type	Telephone	Extension	Preferred
<input type="checkbox"/>				<input type="checkbox"/>



The address information auto-populates in the **Employee's Current Address** section.

28. Click the **Personal Profile** tab.

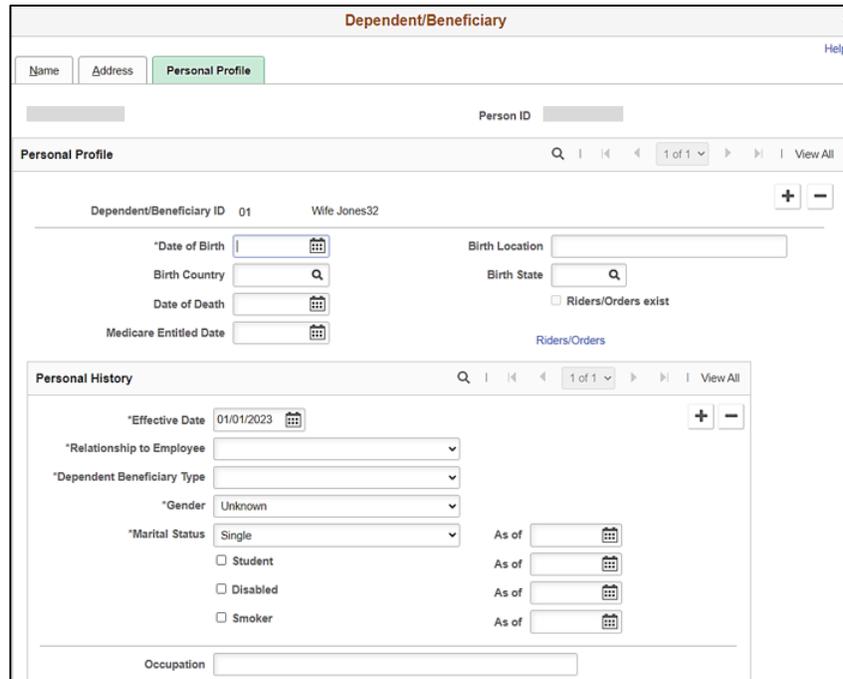


Name | Address | **Personal Profile**

BN361_Creating and Completing a Life Event on behalf of an Employee

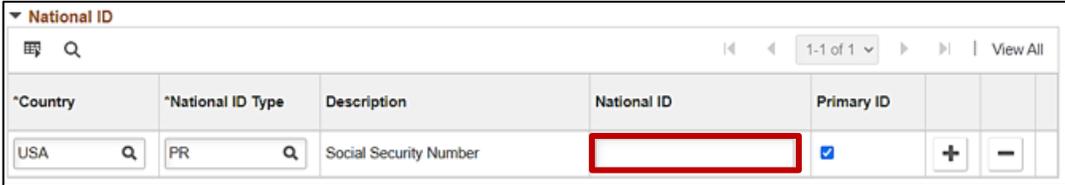
Step	Action
------	--------

The **Personal Profile** tab displays.



	The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The Student and Smoker checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor).
29.	Click the Date of Birth Calendar icon and select the dependent's date of birth. <div style="border: 1px solid red; padding: 5px; display: inline-block;"> *Date of Birth <input type="text"/>  </div>
30.	Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee ("Spouse" in this scenario). <div style="border: 1px solid red; padding: 5px; display: inline-block;"> *Relationship to Employee <input type="text"/> </div>
31.	Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent". <div style="border: 1px solid red; padding: 5px; display: inline-block;"> *Dependent Beneficiary Type <input type="text"/> </div>
	"Approved Dependent" is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.

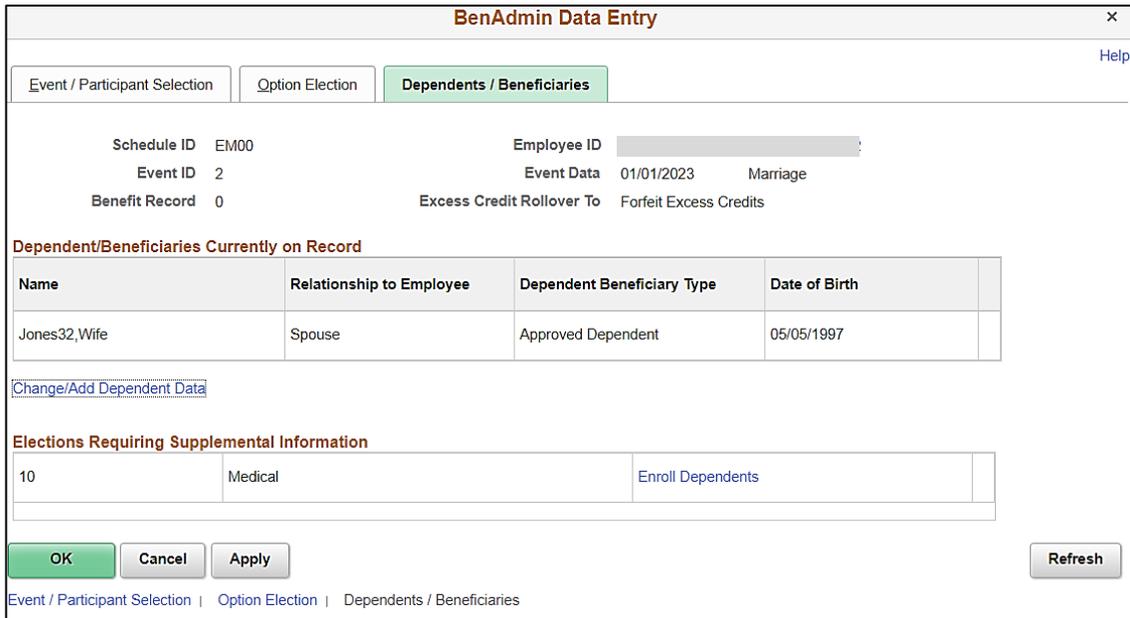
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
32.	Click the Gender dropdown button and select the dependent’s gender (“Unknown”, “Male”, or “Female”) (“Female” in this scenario). 
33.	The Marital Status field defaults to “Single”. Update as needed for the dependent (“Married” in this scenario).  If any status other than “Single” is selected, select the applicable date using the Marital Status as of Calendar icon (“12/16/2022” in this scenario).
34.	Click the vertical scrollbar to scroll down on the page to the National ID section.
35.	Enter the dependent’s Social Security Number (SSN) in the National ID field. 
	If the employee did not provide the dependent’s SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.
36.	Click the OK button. 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Dependents / Beneficiaries** tab redisplay.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. It displays fields for Schedule ID (EM00), Employee ID, Event ID (2), Event Data (01/01/2023 Marriage), and Benefit Record (0). Below this is a table titled 'Dependent/Beneficiaries Currently on Record' with one entry: Jones32,Wife (Spouse, Approved Dependent, 05/05/1997). A link 'Change/Add Dependent Data' is visible below the table. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

i The dependent just added displays in the **Dependent/Beneficiaries Currently on Record** section. If additional dependents need to be added (i.e; birth of twins, adding stepchildren as a result of marriage, etc.), proceed with Step 37. If no additional dependents need to be added, skip to Step 39.

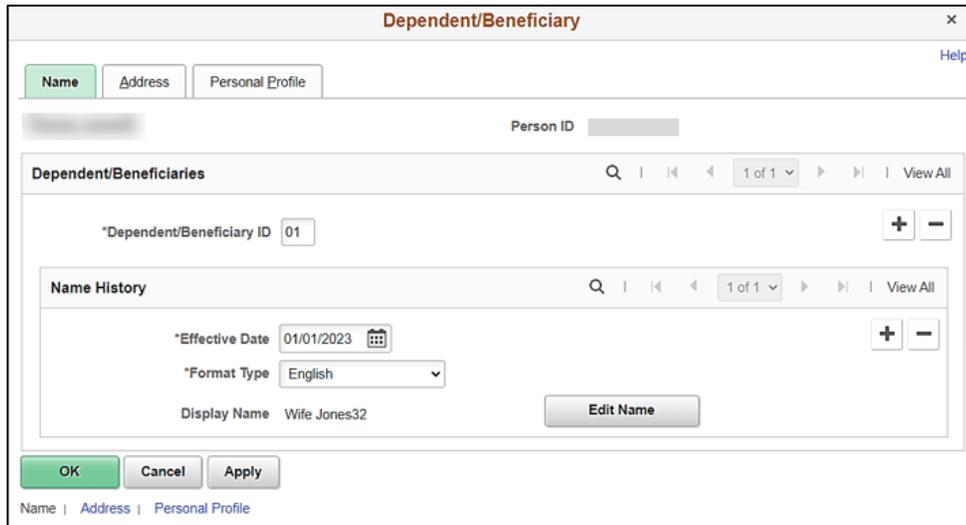
37. In this scenario, a stepchild will be added. Click the **Change/Add Dependent Data** link.

[Change/Add Dependent Data](#)

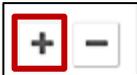
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

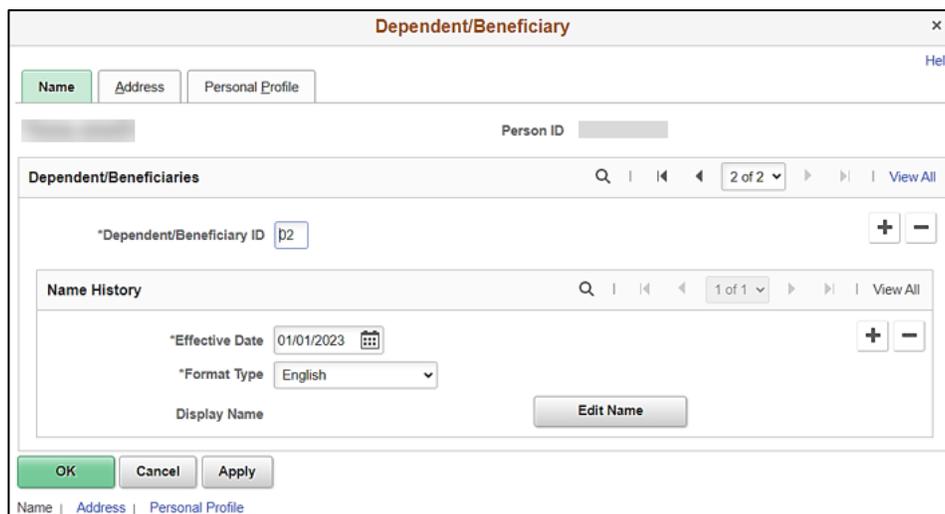
The **Name** tab redisplay.



38. Click the **Add a New Row** icon (+) within the **Dependent/Beneficiaries** section.



The page refreshes with a new row.

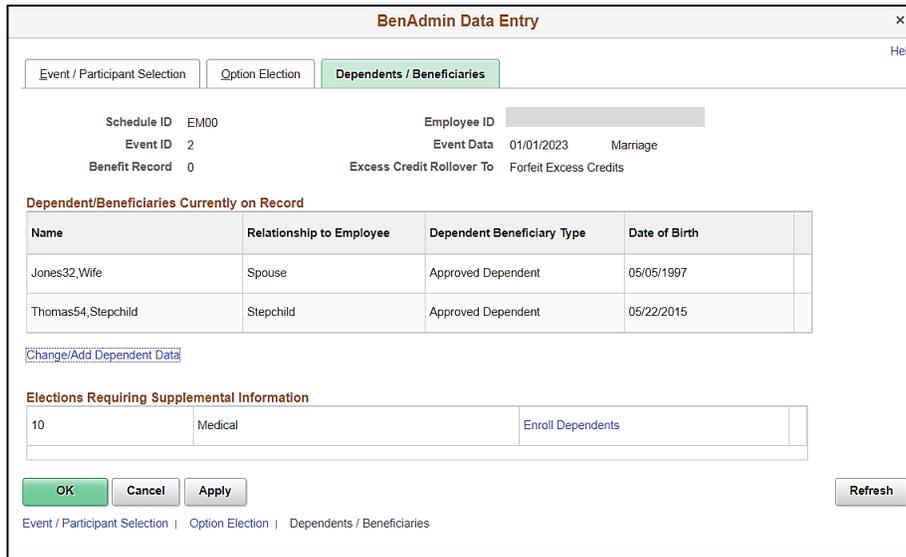



The **Dependent/Beneficiary ID** field increments by “1” (“02” in this scenario as this is the second dependent being added). Dependent/Beneficiary IDs do not need to be sequential and should never be manually updated for existing records. Repeat Steps 23 - 36 to complete the data entry for the next dependent and then repeat Steps 23 – 38 as needed until all dependents have been added.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Dependent/Beneficiaries** tab displays after all dependents have been added.

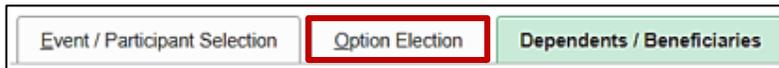


The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. It displays employee information (Schedule ID: EM00, Employee ID: [redacted], Event ID: 2, Event Data: 01/01/2023, Marriage), a table of 'Dependent/Beneficiaries Currently on Record' with two entries (Jones32,Wife and Thomas54,Stepchild), and an 'Elections Requiring Supplemental Information' section with a 'Medical' election and an 'Enroll Dependents' button. Navigation buttons (OK, Cancel, Apply, Refresh) and a breadcrumb trail are also visible.



All dependents that have been added display in the **Dependent/Beneficiaries Currently on Record** section (spouse and a stepchild in this scenario).

39. Click the **Option Election** tab.

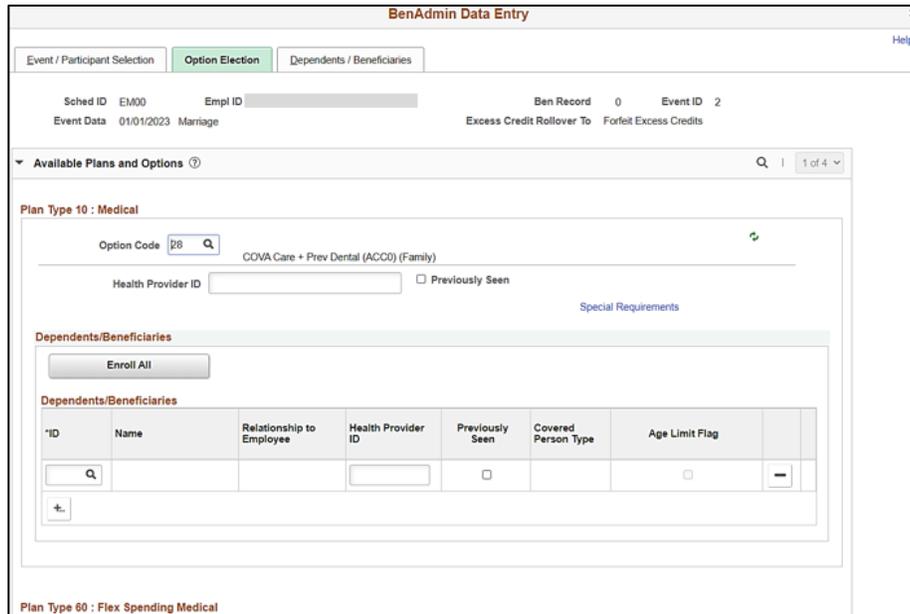


The screenshot shows the three tabs at the top of the BenAdmin Data Entry window: 'Event / Participant Selection', 'Option Election' (highlighted with a red box), and 'Dependents / Beneficiaries'.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Option Election** tab redisplay.



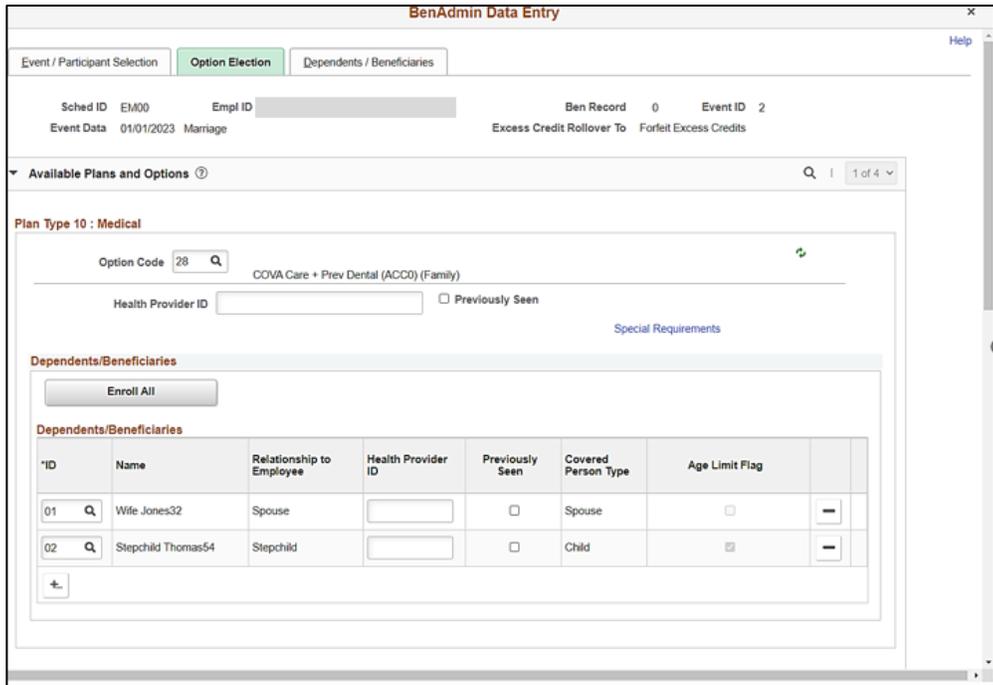
40.	<p>Next, enroll the dependent(s) in the previously selected Medical Plan by Clicking the Enroll All button if all dependents will be enrolled (applicable for this scenario).</p> <div style="border: 2px solid red; padding: 5px; display: inline-block; margin: 10px 0;"> Enroll All </div>
-----	---

	<p>User can also enroll the dependent(s) in the previously selected Medical Plan by adding the applicable dependents individually using the ID Look Up icon within the Dependents/Beneficiaries section. Additional rows can be added in this section by clicking the Add Multiple Rows icon (+...).</p>
---	---

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The page refreshes.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] Ben Record 0 Event ID 2
 Event Data 01/01/2023 Marriage Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 4

Plan Type 10 : Medical

Option Code 28 COVA Care + Prev Dental (ACCO) (Family)
 Health Provider ID [REDACTED] Previously Seen
[Special Requirements](#)

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Wife Jones32	Spouse	[REDACTED]	<input type="checkbox"/>	Spouse	<input type="checkbox"/>
02	Stepchild Thomas54	Stepchild	[REDACTED]	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

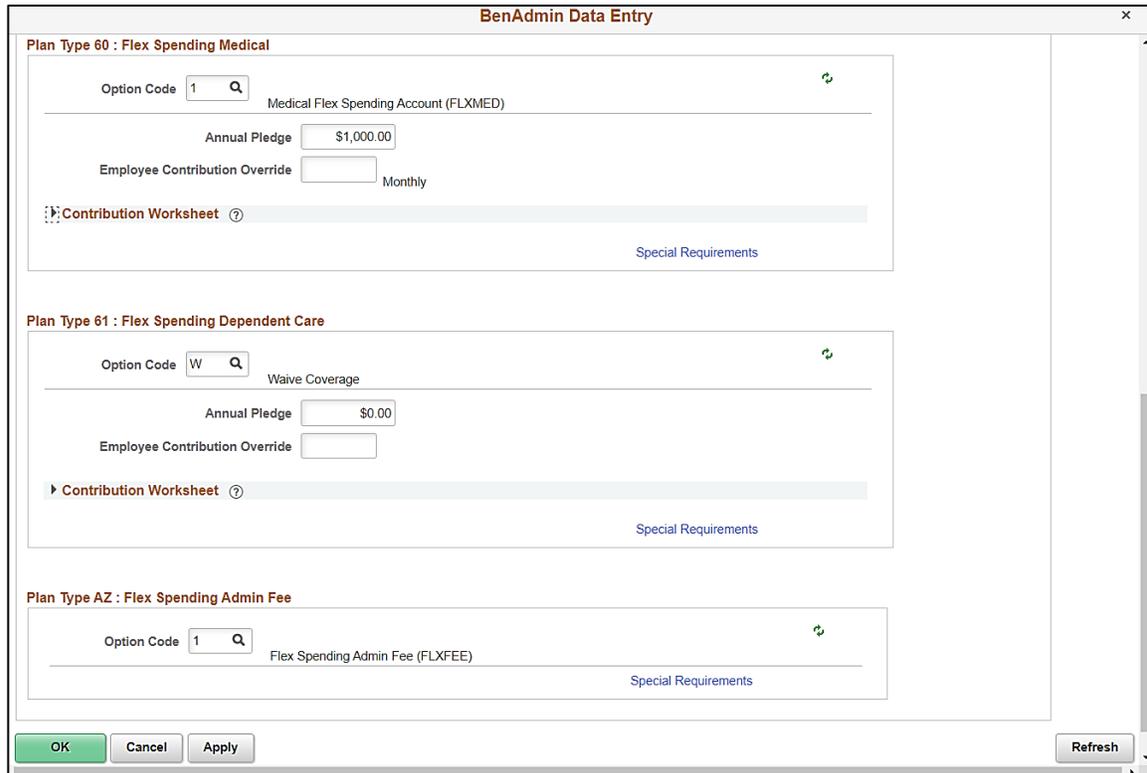
 The dependents enrolled display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.

41. Click the vertical scrollbar to scroll down on the page.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **FSA Elections** section of the **Option Election** page.



The screenshot shows a 'BenAdmin Data Entry' window with three sections for FSA elections:

- Plan Type 60 : Flex Spending Medical**: Option Code '1', Medical Flex Spending Account (FLXMED), Annual Pledge '\$1,000.00', Employee Contribution Override (empty), Contribution Worksheet (expandable), and Special Requirements (link).
- Plan Type 61 : Flex Spending Dependent Care**: Option Code 'W', Waive Coverage, Annual Pledge '\$0.00', Employee Contribution Override (empty), Contribution Worksheet (expandable), and Special Requirements (link).
- Plan Type AZ : Flex Spending Admin Fee**: Option Code '1', Flex Spending Admin Fee (FLXFEE), and Special Requirements (link).

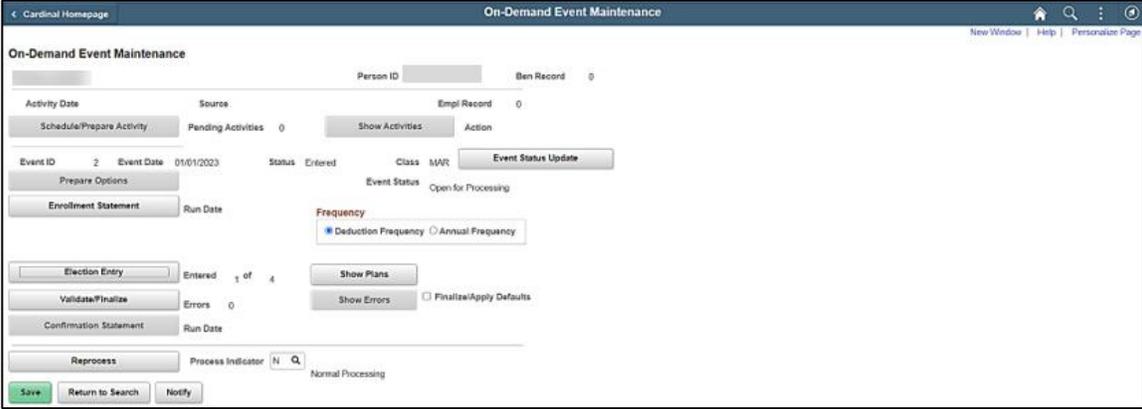
Buttons at the bottom include OK, Cancel, Apply, and Refresh.

 Review the employee's FSA elections and make updates as needed based on the information provided by the employee (in this example, the employee is not making any updates to their FSA elections).

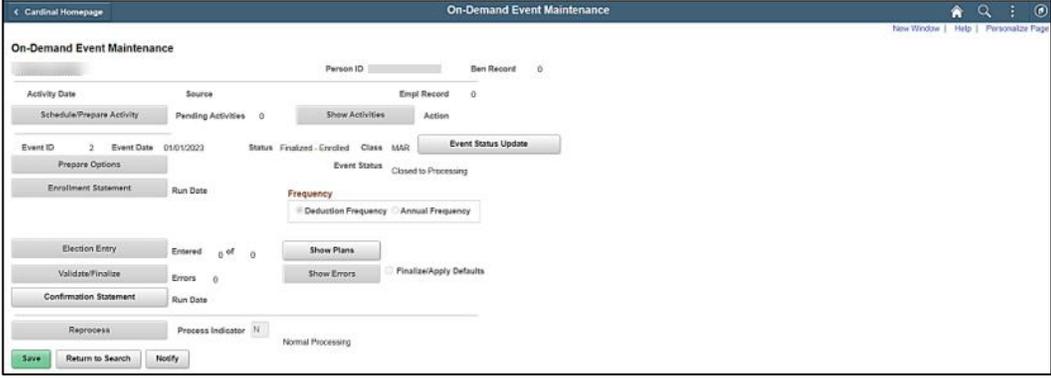
42. Once all elections have been made/updated, click the **OK** button at the bottom of the page.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>Note: The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.</p>
<p>43.</p>	<p>Click the Validate/Finalize button.</p> 
	<p>This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.</p>
	<p>A Confirmation message displays in a pop-up window once the process completes.</p> 
<p>44.</p>	<p>Click the OK button to close the message.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.</p>
<p>45.</p>	<p>Click the Save button.</p> 
	<p>This process is now complete. Refer to the Viewing the Employee's Benefit Information section of this Job Aid for instructions on how to validate accuracy. Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee
Creating and Processing a Life Event on behalf of an Employee (Removing Dependent(s))

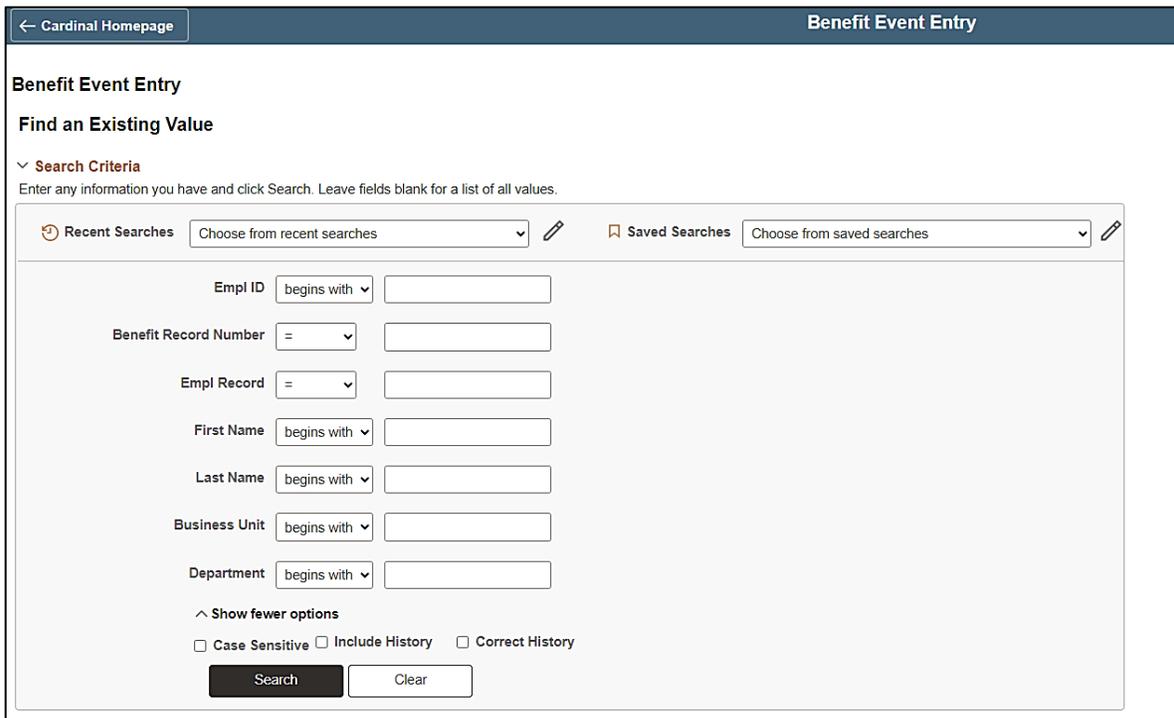
This section of the Job Aid should be referenced when creating and processing a Life Event on behalf of the employee wherein one or more dependents is being removed from the employee's coverage (divorce, death, etc.). The steps included in this section of the Job Aid are based on the following example scenario.

Scenario: An employee got divorced on 6/21/2024. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 6/21/2024 to remove their ex-spouse from enrollment in their Health Plan. The children from the marriage are going to remain enrolled in the employee's Health Plan. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being removed from the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

Step	Action
1.	Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Find an Existing Value** page displays.



← Cardinal Homepage Benefit Event Entry

Benefit Event Entry

Find an Existing Value

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

🕒 Recent Searches

Empl ID

Benefit Record Number

Empl Record

First Name

Last Name

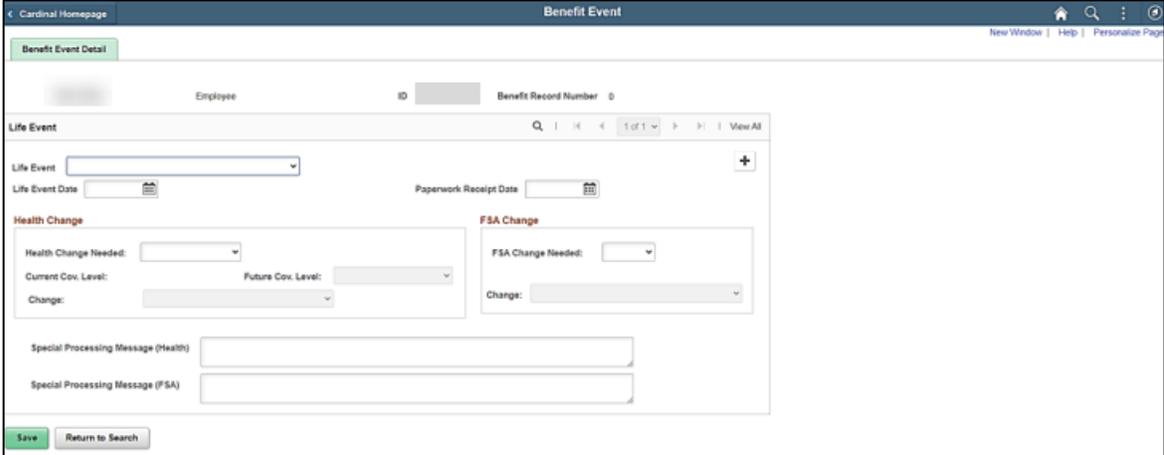
Business Unit

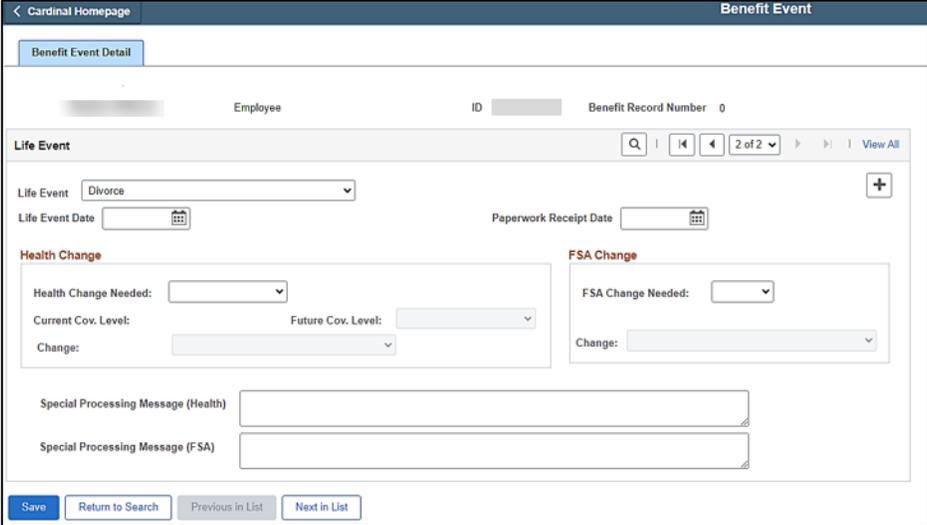
Department

^ Show fewer options

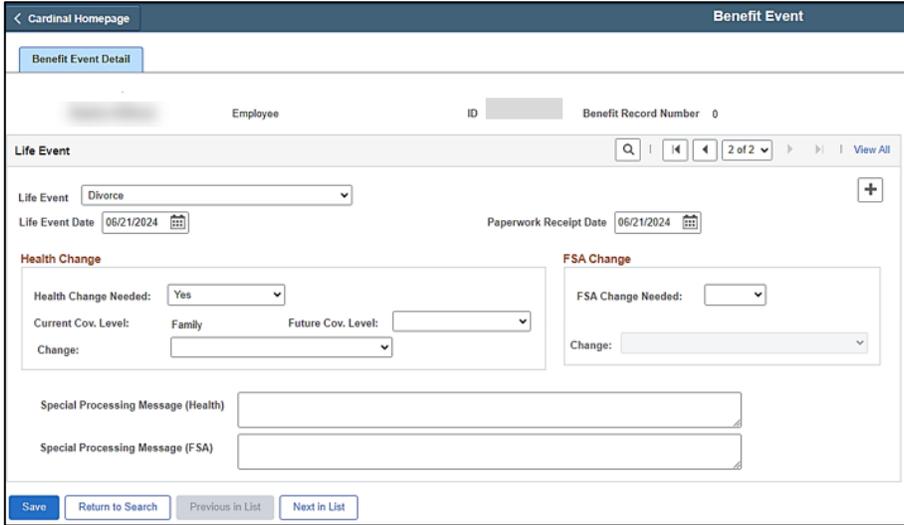
Case Sensitive Include History Correct History

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter the employee's Employee ID in the Search by field. The other search by options available (Search by dropdown button) are Business Unit, Department, and Name. <div data-bbox="284 636 1084 709" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Search by: <input type="text" value="Empl ID"/> begins with <input style="border: 2px solid red;" type="text"/> </div>
3.	Click the Search button. <div data-bbox="284 800 995 898" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: center; gap: 20px;"> <div style="border: 2px solid red; padding: 5px 15px; background-color: #333; color: white; font-weight: bold;">Search</div> <div style="border: 1px solid black; padding: 5px 15px;">Clear</div> </div> </div>
The Benefit Event page displays for the applicable employee.	
<div data-bbox="237 989 1401 1444" style="border: 1px solid black; padding: 10px;">  <p>The screenshot shows the 'Benefit Event' page with the 'Life Event' dropdown menu open. The dropdown list includes 'Divorce', which is highlighted in red. Other options visible include 'Marriage', 'Death', 'Retirement', 'Change of Address', 'Change of Name', 'Change of Social Security Number', 'Change of Date of Birth', 'Change of Gender', 'Change of Marital Status', 'Change of Religion', 'Change of Race', 'Change of Ethnicity', 'Change of Nationality', 'Change of Citizenship', 'Change of Country of Birth', 'Change of Country of Residence', 'Change of Country of Employment', 'Change of Country of Social Security Number', 'Change of Country of Health Insurance', 'Change of Country of Life Insurance', 'Change of Country of Disability Insurance', 'Change of Country of Long-Term Care Insurance', 'Change of Country of Life Annuity Insurance', 'Change of Country of Pension Insurance', 'Change of Country of Other Insurance', 'Change of Country of Other Benefits', 'Change of Country of Other Services', 'Change of Country of Other Programs', 'Change of Country of Other Plans', 'Change of Country of Other Policies', 'Change of Country of Other Contracts', 'Change of Country of Other Agreements', 'Change of Country of Other Documents', 'Change of Country of Other Records', 'Change of Country of Other Information', 'Change of Country of Other Data', 'Change of Country of Other Files', 'Change of Country of Other Images', 'Change of Country of Other Videos', 'Change of Country of Other Audio', 'Change of Country of Other Text', 'Change of Country of Other Graphics', 'Change of Country of Other Animations', 'Change of Country of Other Applications', 'Change of Country of Other Software', 'Change of Country of Other Hardware', 'Change of Country of Other Peripherals', 'Change of Country of Other Accessories', 'Change of Country of Other Components', 'Change of Country of Other Parts', 'Change of Country of Other Materials', 'Change of Country of Other Supplies', 'Change of Country of Other Consumables', 'Change of Country of Other Services', 'Change of Country of Other Programs', 'Change of Country of Other Plans', 'Change of Country of Other Policies', 'Change of Country of Other Contracts', 'Change of Country of Other Agreements', 'Change of Country of Other Documents', 'Change of Country of Other Records', 'Change of Country of Other Information', 'Change of Country of Other Data', 'Change of Country of Other Files', 'Change of Country of Other Images', 'Change of Country of Other Videos', 'Change of Country of Other Audio', 'Change of Country of Other Text', 'Change of Country of Other Graphics', 'Change of Country of Other Animations', 'Change of Country of Other Applications', 'Change of Country of Other Software', 'Change of Country of Other Hardware', 'Change of Country of Other Peripherals', 'Change of Country of Other Accessories', 'Change of Country of Other Components', 'Change of Country of Other Parts', 'Change of Country of Other Materials', 'Change of Country of Other Supplies', 'Change of Country of Other Consumables'.</p> </div>	
4.	Click the Life Event dropdown button and select the applicable type of Life Event by clicking the corresponding list item ("Divorce" in this scenario). <div data-bbox="284 1566 821 1612" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Life Event <input style="border: 2px solid red;" type="text"/> </div>

Step	Action
	<p>The Benefit Event page redispays with the selected Life Event.</p> 
5.	<p>Click the Life Event Date Calendar icon and select the applicable date (“6/21/2024” in this scenario).</p> 
	<p>This is the date of the actual event (marriage, birth, divorce, etc.).</p>
6.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date (“6/21/2024” in this scenario).</p> 
	<p>This is the date that the Benefits Enrollment form was received from the employee.</p>

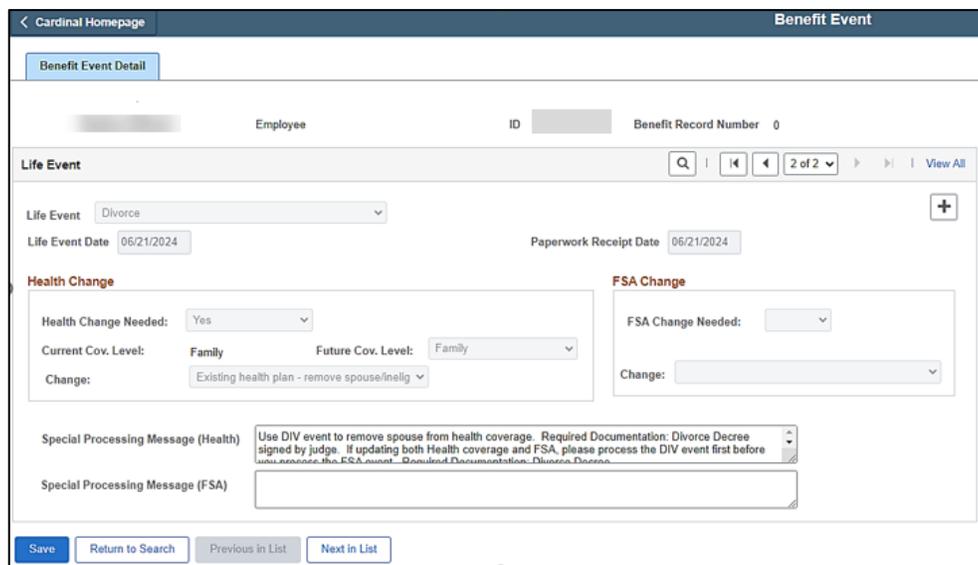
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
7.	<p>Click the Health Change Needed dropdown button and select the applicable answer based on the following:</p> <ul style="list-style-type: none"> • If the Life Event does require a change in the Health Plan Coverage Code for the employee, select “Yes” (i.e; this is a divorce event, and the employee will still cover two children dependents (no change from “Family” coverage)) • Even if the Life Event does not require a change in the Health Plan Coverage Code, but it will require changes to the covered dependent(s), select “Yes”. If “Yes” is not selected, a Benefit Event will not be created <div data-bbox="284 688 782 747" style="border: 1px solid black; padding: 5px;"> Health Change Needed: <input style="border: 2px solid red;" type="text" value=""/> </div>
<p>The Benefit Event page refreshes.</p> <div data-bbox="365 831 1269 1356" style="border: 1px solid black; padding: 10px;">  </div>	
	<p>The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.</p>
8.	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> <div data-bbox="284 1556 794 1614" style="border: 1px solid black; padding: 5px;"> Future Cov. Level: <input style="border: 2px solid red;" type="text" value=""/> </div>
	<p>The coverage levels available for selection are “Single, Employee”, “Employee + Spouse”, “Employee + CH (Child)”, and “Family”. Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
9.	Click the Change dropdown button and select the applicable list item (“Existing health plan – remove spouse/ineligible dependents” in this scenario). 
	The selections available will vary based on the type of Life Event previously selected.

 Completed **Benefit Event Entry** page.



Cardinal Homepage Benefit Event

Benefit Event Detail

Employee ID: [redacted] Benefit Record Number: 0

Life Event: Divorce +

Life Event Date: 06/21/2024 Paperwork Receipt Date: 06/21/2024

Health Change

Health Change Needed: Yes +

Current Cov. Level: Family Future Cov. Level: Family

Change: Existing health plan - remove spouse/inelig +

FSA Change

FSA Change Needed: +

Change: +

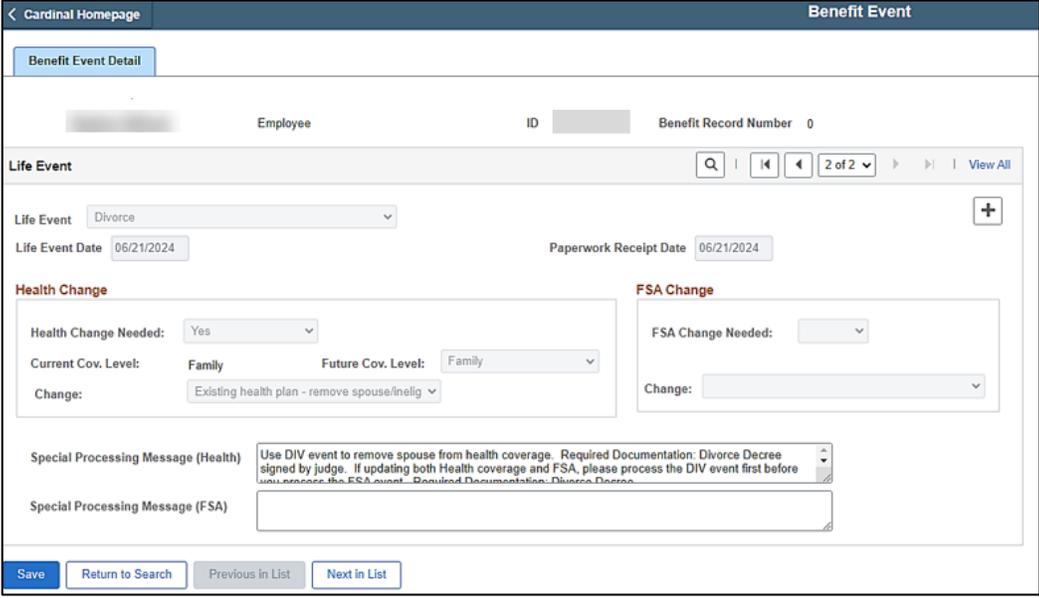
Special Processing Message (Health): Use DIV event to remove spouse from health coverage. Required Documentation: Divorce Decree signed by judge. If updating both Health coverage and FSA, please process the DIV event first before updating the FSA event. Required Documentation: Divorce Decree.

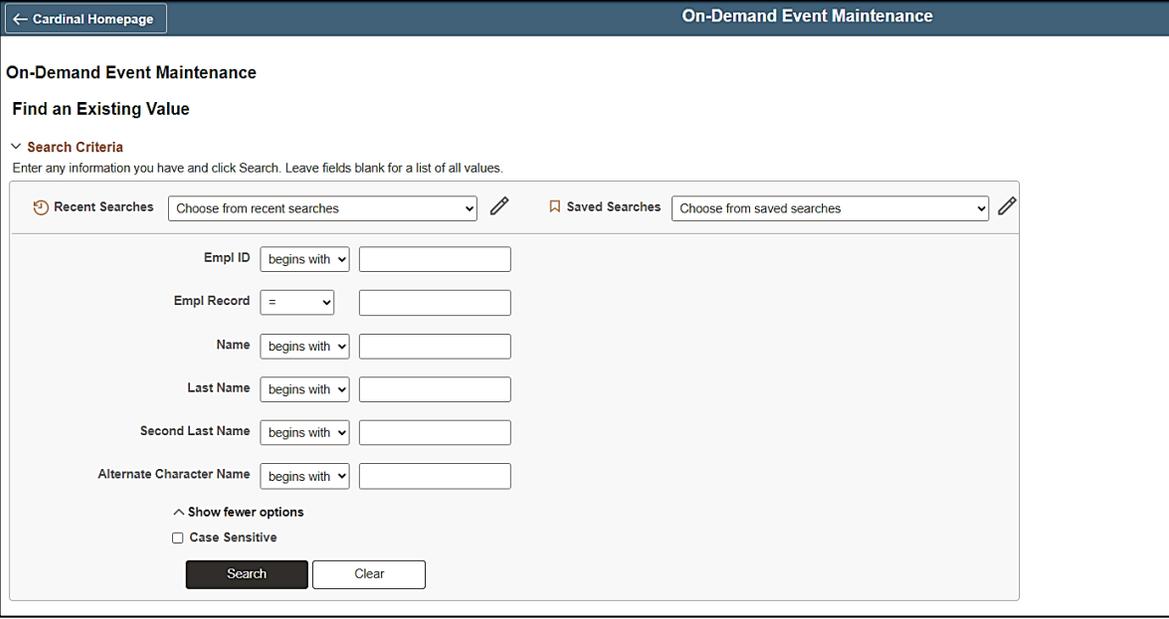
Special Processing Message (FSA):

Save Return to Search Previous in List Next in List

10.	Click the Save button. 
-----	--

BN361_Creating and Completing a Life Event on behalf of an Employee

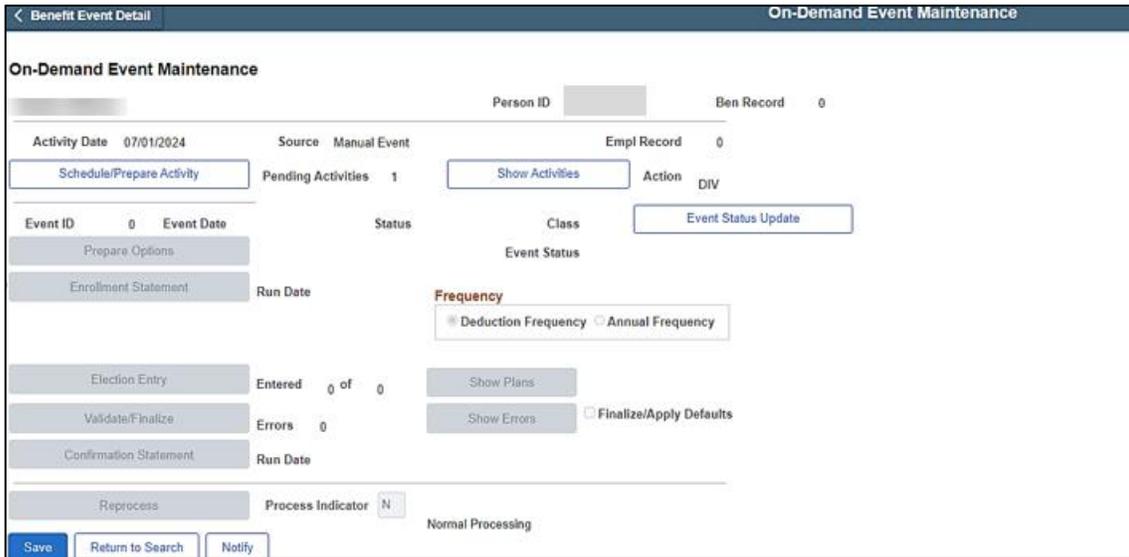
Step	Action
	<p>The page refreshes once the save is complete.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions.</p> <p>Note: If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
<p>11.</p>	<p>Navigate to the On-Demand Event Maintenance page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance</p>

Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
<p>12.</p>	<p>Enter the employee’s Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee’s name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
<p>13.</p>	<p>Click the Search button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

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



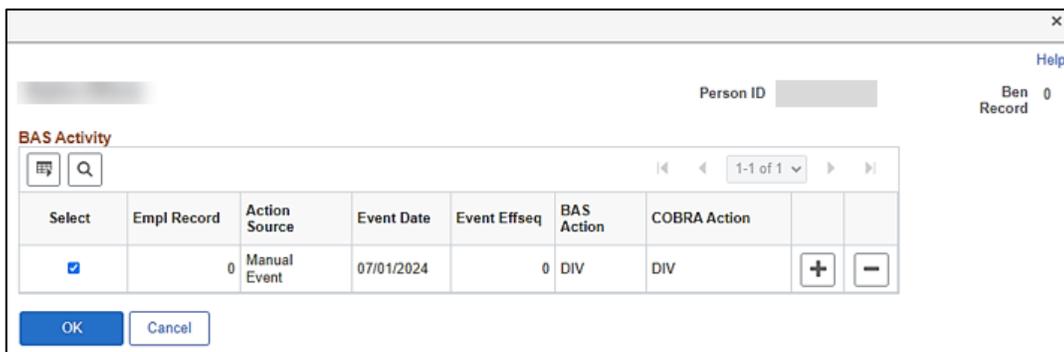

Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Life Event is a divorce, so the **Activity Date** field defaults to the first day of the following month). Ensure that this date is accurate.

The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“DIV” for Divorce in this scenario).

14. Click the **Show Activities** button.

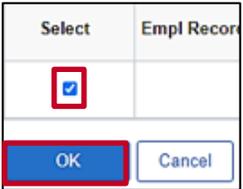


The **BAS Activity** page displays in a pop-up window.

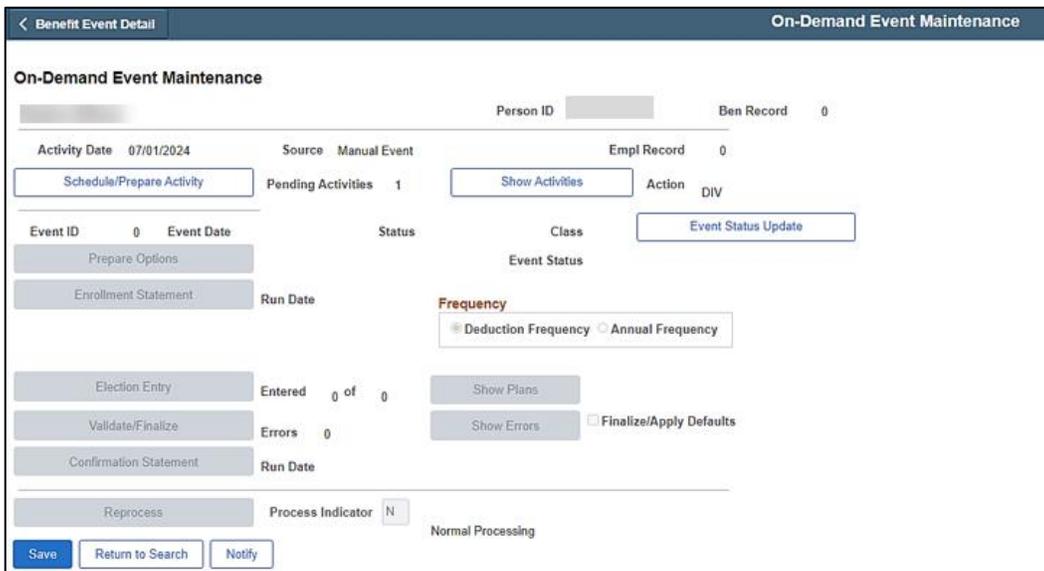


Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	07/01/2024	0	DIV	DIV

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
15.	<p>Ensure that the Select checkbox option for the Manual Benefit Event is selected and then click the OK button.</p> 

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



The screenshot shows the 'On-Demand Event Maintenance' page. Key elements include:

- Activity Date: 07/01/2024
- Source: Manual Event
- Pending Activities: 1
- Event ID: 0
- Event Date: [blank]
- Status: [blank]
- Class: [blank]
- Frequency: Deduction Frequency (selected), Annual Frequency
- Entered: 0 of 0
- Errors: 0
- Run Date: [blank]
- Process Indicator: N
- 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, and Notify.



If the Benefits Administration process has already run since the time the manual event was created, the **Pending Activities** field will display a “0”. In this case, proceed to Step 18. If the **Pending Activities** field displays a “1”, click the **Schedule/Prepare Activity** button.

Clicking the **Schedule/Prepare Activity** button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

A **Confirmation** message displays in a pop-up window once the automated program completes.

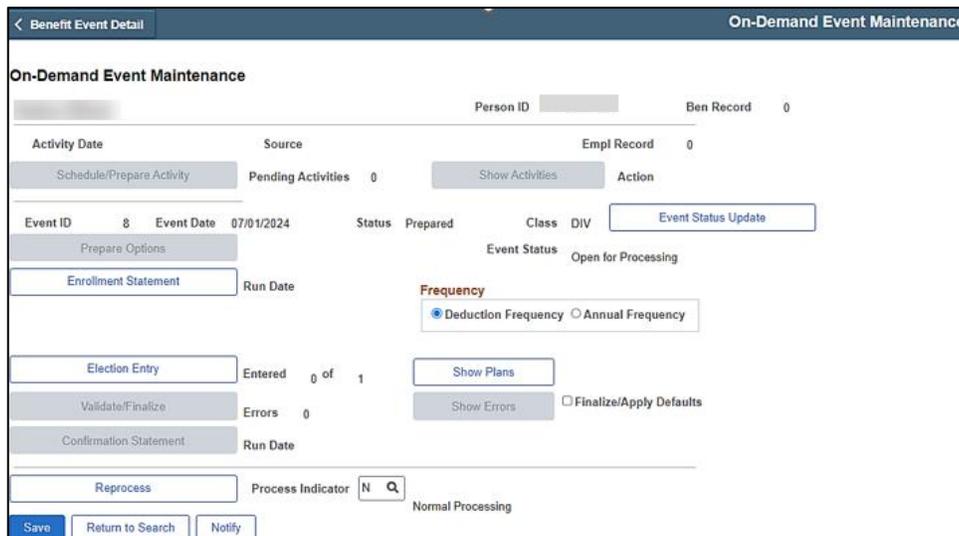


The confirmation message reads: "Process completed successfully. (3000,530)" with an **OK** button below it.

BN361_Creating and Completing a Life Event on behalf of an Employee

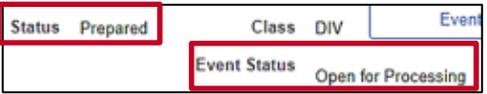
Step	Action
16.	Click the OK button. 

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



The screenshot shows the 'On-Demand Event Maintenance' interface. Key fields include:

- Person ID: [redacted]
- Ben Record: 0
- Activity Date: [redacted]
- Source: [redacted]
- Empl Record: 0
- Event ID: 8
- Event Date: 07/01/2024
- Status: Prepared
- Class: [redacted]
- DIV: [redacted]
- Event Status: Open for Processing
- Frequency: Deduction Frequency Annual Frequency
- Entered: 0 of 1
- Errors: 0
- Process Indicator: N
- Normal Processing

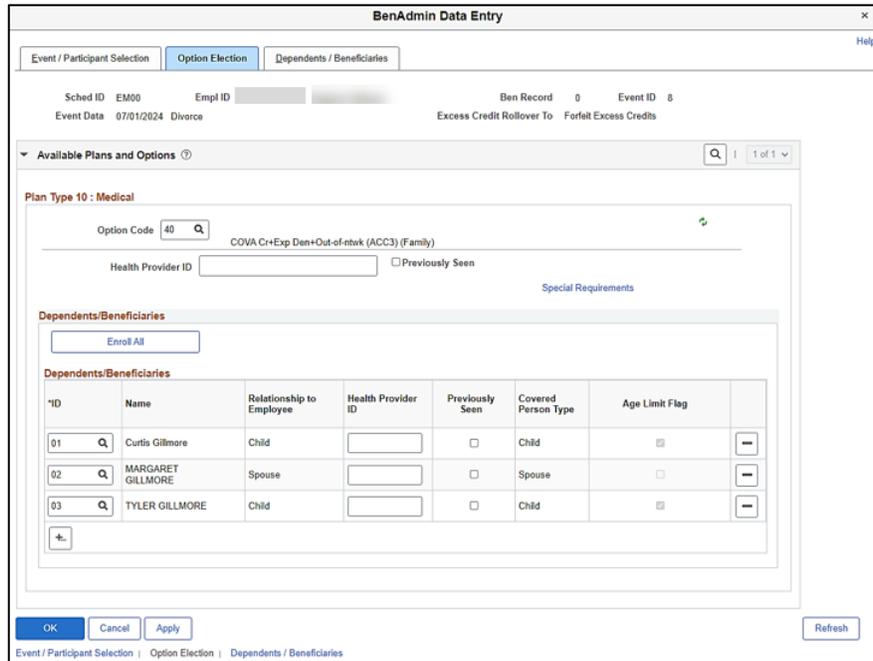
	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p>  <p>If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.</p>
---	---

18.	Click the Election Entry button. 
-----	--

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. It displays event details (Sched ID: EM00, Event Data: 07/01/2024 Divorce), available plans (Plan Type 10: Medical), and a table of dependents/beneficiaries.

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Curtis Gillmore	Child		<input type="checkbox"/>	Child	<input type="checkbox"/>
02	MARGARET GILLMORE	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>
03	TYLER GILLMORE	Child		<input type="checkbox"/>	Child	<input type="checkbox"/>

19. First, select the applicable Medical Plan based on the employee's Benefits Enrollment form as needed by clicking the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and then selecting the applicable Medical Plan/Coverage Code (in this scenario, the employee has three children dependents that are not being removed and therefore, the Medical Plan coverage code does need to be updated).

The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child (except for Tricare), and 4 – Employee + 2 or More Dependents (Family – except for Tricare), 8 – Employee + Child(ren) (Tricare only), and 9 – Family (EE + SP + Child/ren for Tricare only).



A close-up of the 'Option Code' field in the 'Plan Type 10: Medical' section. The value '40' is entered, and the magnifying glass icon is highlighted with a red box.

20. Next, update the applicable dependent being removed from coverage. Click the **Dependents / Beneficiaries** tab.

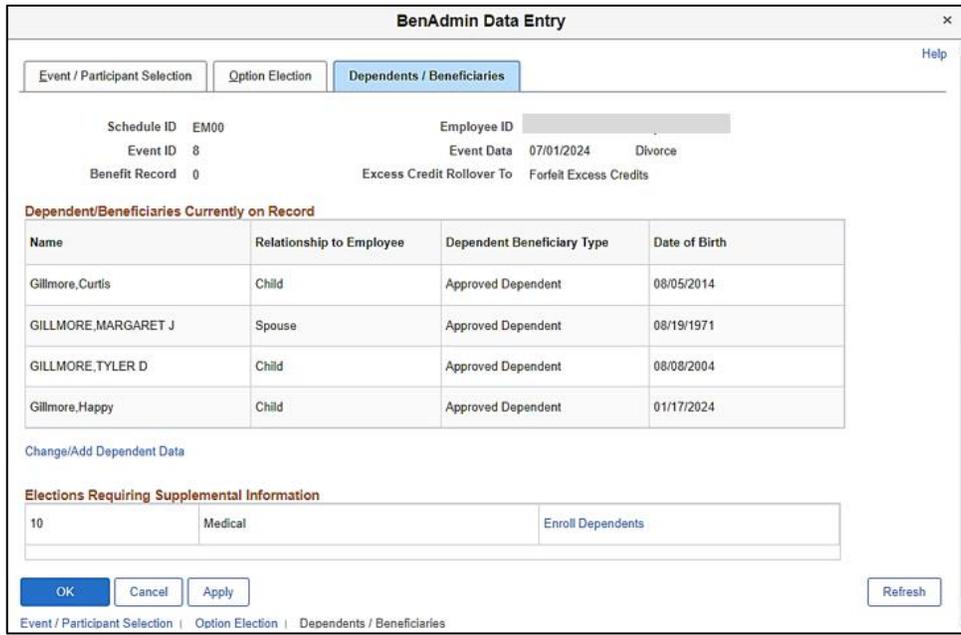


A close-up of the navigation tabs: 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Dependents / Beneficiaries' tab is highlighted with a red box.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Dependents / Beneficiaries** tab displays.



BenAdmin Data Entry

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

Schedule ID EM00 Employee ID [Redacted]
 Event ID 8 Event Data 07/01/2024 Divorce
 Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Gillmore,Curtis	Child	Approved Dependent	08/05/2014
GILLMORE,MARGARET J	Spouse	Approved Dependent	08/19/1971
GILLMORE,TYLER D	Child	Approved Dependent	08/08/2004
Gillmore,Happy	Child	Approved Dependent	01/17/2024

Change/Add Dependent Data

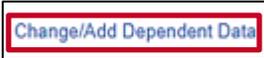
Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-------------------

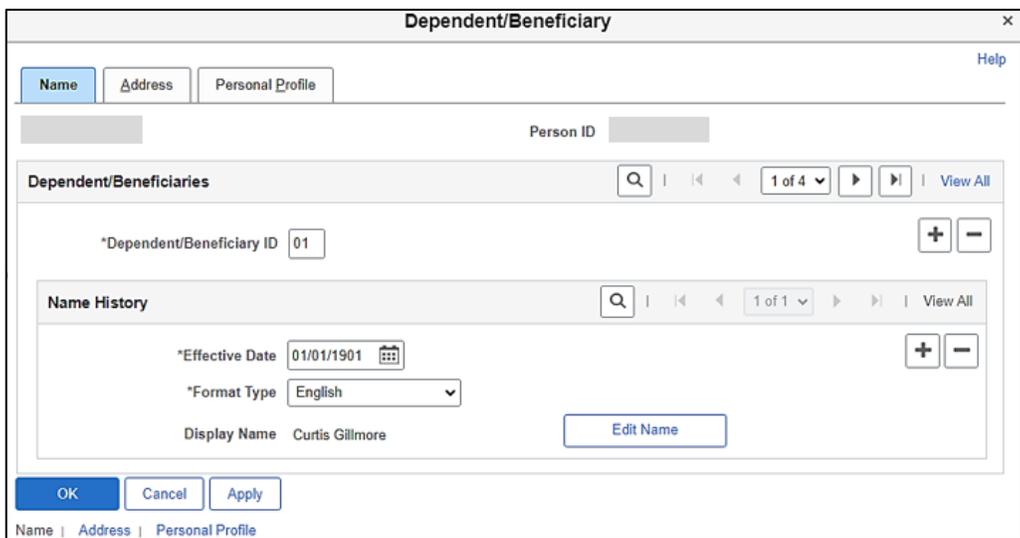
OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

21. Click the **Change/Add Dependent Data** link.



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



Dependent/Beneficiary

Name | Address | Personal Profile | Help

[Redacted] Person ID [Redacted]

Dependent/Beneficiaries [Search] | [Page 1 of 4] | View All

*Dependent/Beneficiary ID 01 [+ -]

Name History [Search] | [Page 1 of 1] | View All

*Effective Date 01/01/1901 [Calendar] [+ -]
 *Format Type English [Dropdown]
 Display Name Curtis Gillmore [Edit Name]

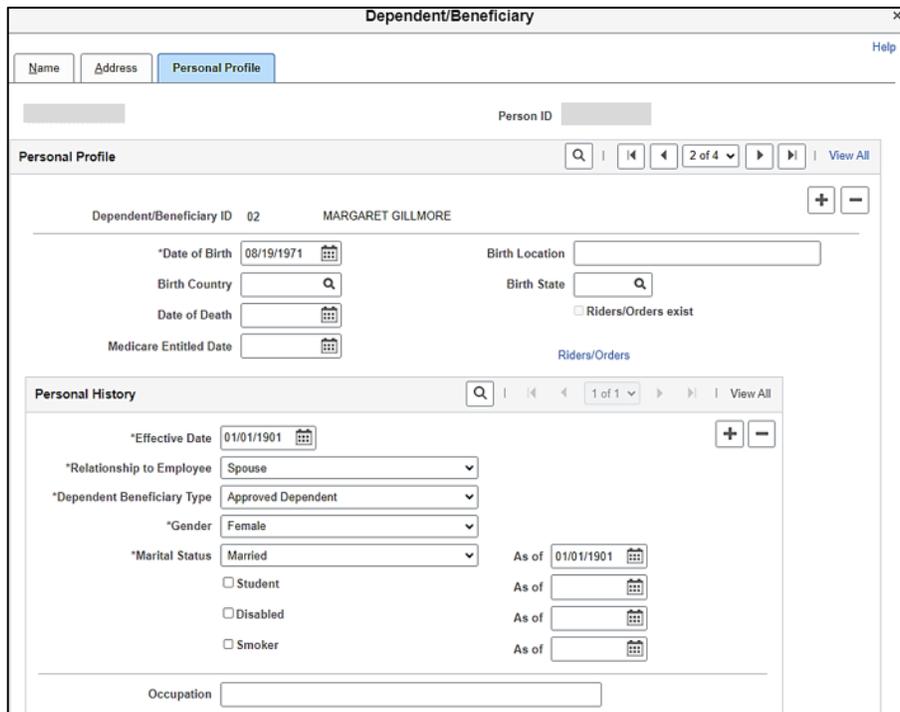
OK Cancel Apply

Name | Address | Personal Profile

BN361_Creating and Completing a Life Event on behalf of an Employee

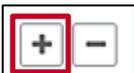
Step	Action
22.	Next, locate the dependent being removed. Click the Personal Profile tab. 

The **Personal Profile** tab displays.



The screenshot shows a web form titled "Dependent/Beneficiary" with tabs for "Name", "Address", and "Personal Profile". The "Personal Profile" section includes fields for "Date of Birth" (08/19/1971), "Birth Location", "Birth Country", "Birth State", "Date of Death", "Medicare Entitled Date", and "Riders/Orders exist". The "Personal History" section includes fields for "Effective Date" (01/01/1901), "Relationship to Employee" (Spouse), "Dependent Beneficiary Type" (Approved Dependent), "Gender" (Female), "Marital Status" (Married), and "Occupation". There are also "As of" date fields and checkboxes for "Student", "Disabled", and "Smoker".

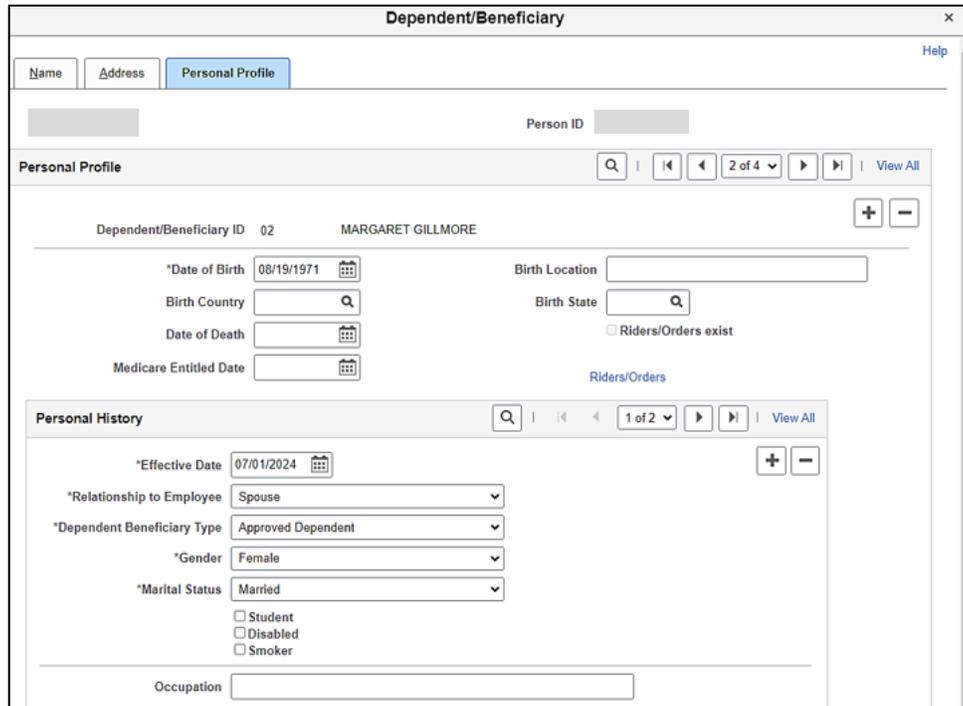
	<p>When removing dependents from coverage due to a Life Event, do not remove the dependent from Cardinal entirely as this will remove important audit history information from the system. The Delete icon (-) would delete the dependent from Cardinal. Do not use this icon. Complete the following steps to correctly remove the no longer eligible dependent from coverage.</p> 
---	--

23.	Click the Add a Row icon (+) within the Personal History section. 
-----	--

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The page refreshes with a new row.



Dependent/Beneficiary

Name | Address | **Personal Profile** | Help

Person ID [redacted]

Personal Profile | Search | Navigation | 2 of 4 | View All

Dependent/Beneficiary ID 02 MARGARET GILLMORE

*Date of Birth 08/19/1971 | Birth Location [redacted]
 Birth Country [redacted] | Birth State [redacted]
 Date of Death [redacted] | Riders/Orders exist
 Medicare Entitled Date [redacted] | Riders/Orders

Personal History | Search | Navigation | 1 of 2 | View All

*Effective Date 07/01/2024

*Relationship to Employee Spouse
 *Dependent Beneficiary Type Approved Dependent
 *Gender Female
 *Marital Status Married
 Student
 Disabled
 Smoker

Occupation [redacted]



The **Effective Date** field defaults to the date on which coverage for the dependent will be stopped based on the Life Event being processed (first day of the following month in this scenario due to a Divorce event being processed).

24.

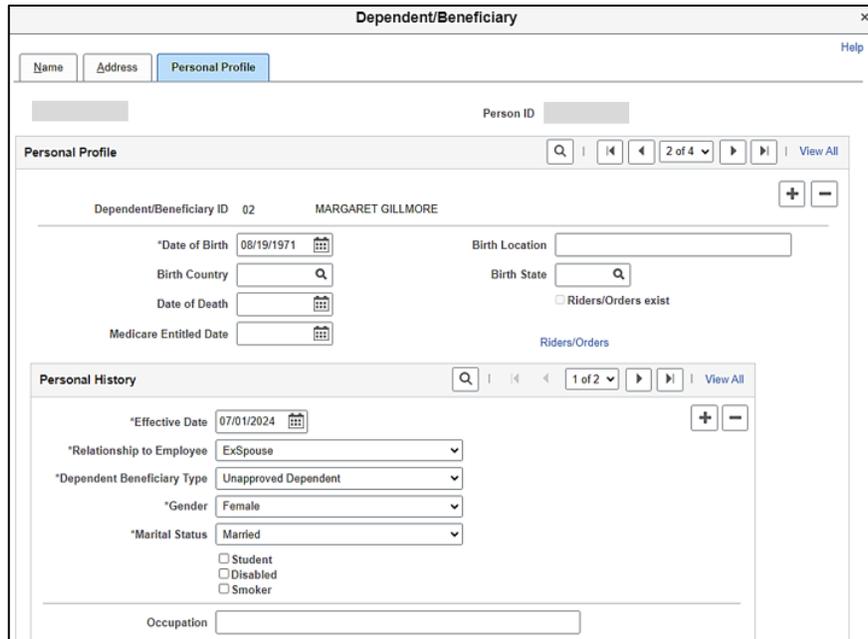
Click the **Relationship to Employee dropdown** button and select the applicable list item (“ExSpouse” in this scenario).

*Relationship to Employee **Spouse** ▼

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The page refreshes based on the relationship to employee selection.



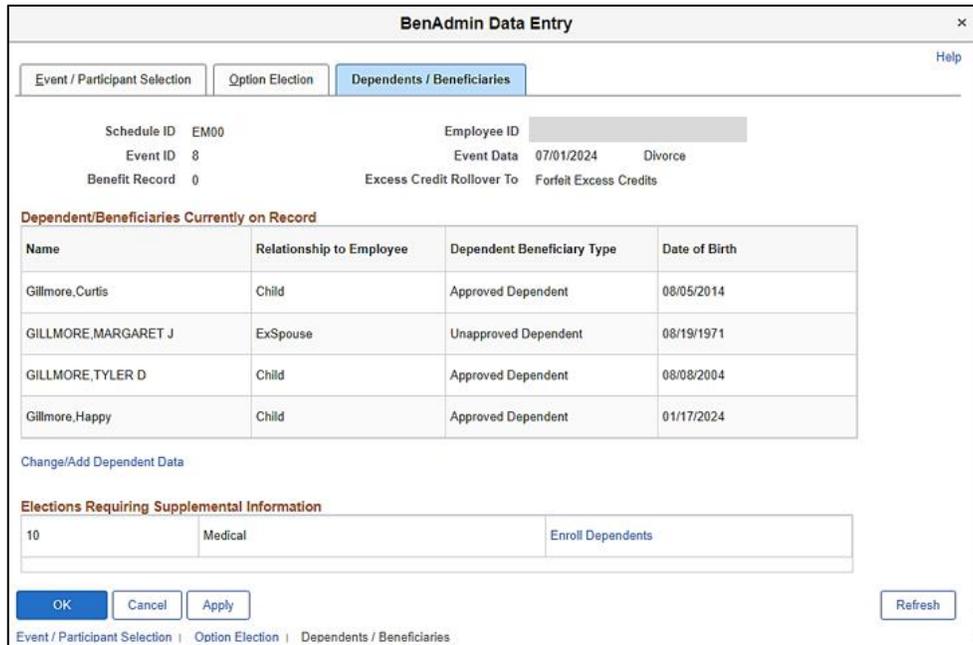
The screenshot shows a web form titled "Dependent/Beneficiary" with tabs for "Name", "Address", and "Personal Profile". The "Personal Profile" section includes fields for "Date of Birth" (08/19/1971), "Birth Country", "Date of Death", "Medicare Entitled Date", "Birth Location", "Birth State", and "Riders/Orders exist". The "Personal History" section includes fields for "Effective Date" (07/01/2024), "Relationship to Employee" (ExSpouse), "*Dependent Beneficiary Type" (Unapproved Dependent), "Gender" (Female), and "*Marital Status" (Married). There are also checkboxes for "Student", "Disabled", and "Smoker", and an "Occupation" field.

	<p>The Dependent Beneficiary Type field updates to “Unapproved Dependent” based on the relationship to employee selection.</p> 
25.	<p>Click the Marital Status dropdown button and select the applicable list item (“Divorced” in this scenario).</p> 
26.	<p>Scroll down to the bottom of the page as needed and click the OK button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **BenAdmin Data Entry** page redispays.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The window displays the following information:

- Schedule ID: EM00
- Event ID: 8
- Benefit Record: 0
- Employee ID: [Redacted]
- Event Data: 07/01/2024
- Divorce
- Excess Credit Rollover To: Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Gillmore, Curtis	Child	Approved Dependent	08/05/2014
GILLMORE, MARGARET J	ExSpouse	Unapproved Dependent	08/19/1971
GILLMORE, TYLER D	Child	Approved Dependent	08/08/2004
Gillmore, Happy	Child	Approved Dependent	01/17/2024

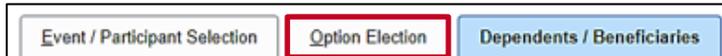
Below the table, there is a section for 'Elections Requiring Supplemental Information' with a dropdown menu set to '10' and a label 'Medical'. There is an 'Enroll Dependents' button. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.



The applicable dependent is updated to an unapproved dependent in the **Dependent/Beneficiaries Currently on Record** table.

27.

Next, update the enrolled dependents. Click the **Option Election** tab.

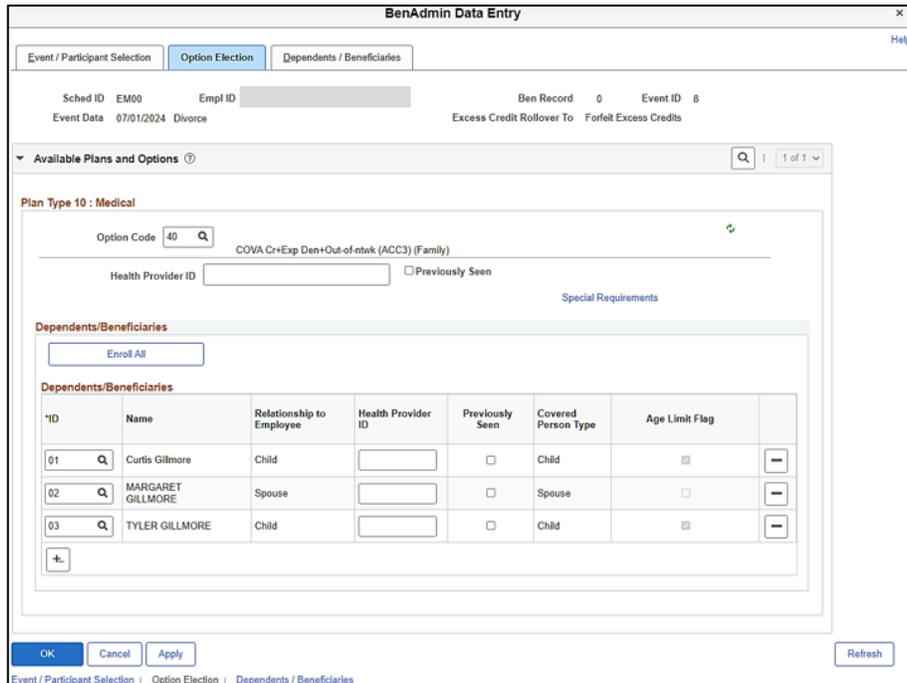


The screenshot shows the three tabs at the top of the BenAdmin Data Entry window: 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Option Election' tab is highlighted with a red border.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Option Election** tab redisplay.



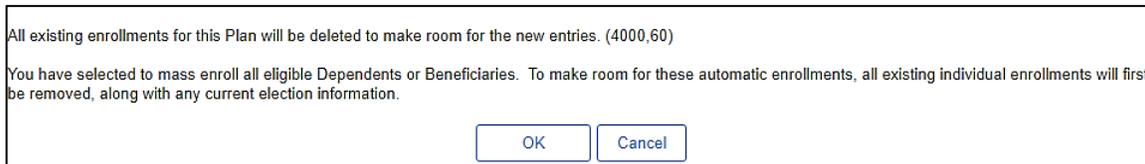
The screenshot shows the 'BenAdmin Data Entry' application window with the 'Option Election' tab selected. The 'Available Plans and Options' section is expanded to show 'Plan Type 10 : Medical'. Below this, there are fields for 'Option Code' (40), 'Health Provider ID', and a 'Previously Seen' checkbox. A table titled 'Dependents/Beneficiaries' is visible, containing three rows of dependent information.

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
01	Curtis Gillmore	Child		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>
02	MARGARET GILLMORE	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>
03	TYLER GILLMORE	Child		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>

28. Click the **Enroll All** button.



A message displays in a pop-up window indicating that all dependents will be removed in order to re-enroll the eligible dependents. This is an expected message and not an error.



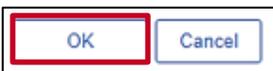
The pop-up message contains the following text:

All existing enrollments for this Plan will be deleted to make room for the new entries. (4000,60)

You have selected to mass enroll all eligible Dependents or Beneficiaries. To make room for these automatic enrollments, all existing individual enrollments will first be removed, along with any current election information.

At the bottom of the message are two buttons: 'OK' and 'Cancel'.

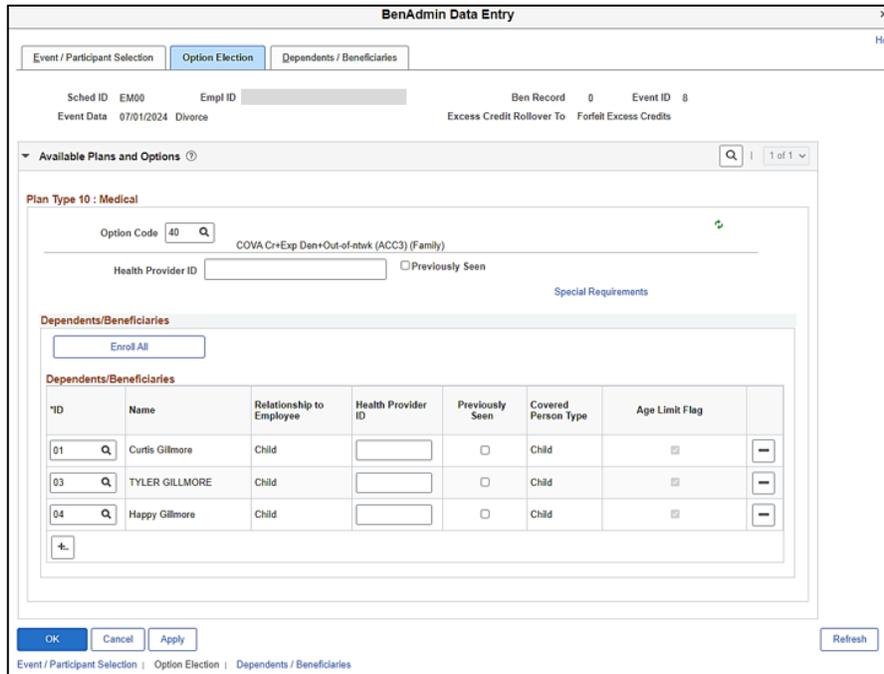
29. Click the **OK** button to close the message.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Option Election** tab redisplay.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] Ben Record 0 Event ID 8
 Event Data 07/01/2024 Divorce Excess Credit Rollover To Forfeited Excess Credits

Available Plans and Options 1 of 1

Plan Type 10 : Medical

Option Code 40 COVA Cr+Exp Den+Out-of-ntwk (ACC3) (Family)
 Health Provider ID [REDACTED] Previously Seen Special Requirements

Dependents/Beneficiaries

Enroll All

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Curtis Gillmore	Child	[REDACTED]	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	[-]
03	TYLER GILLMORE	Child	[REDACTED]	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	[-]
04	Happy Gillmore	Child	[REDACTED]	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	[-]

OK Cancel Apply Refresh

 The removed dependent no longer displays in the **Dependents/Beneficiaries** section.

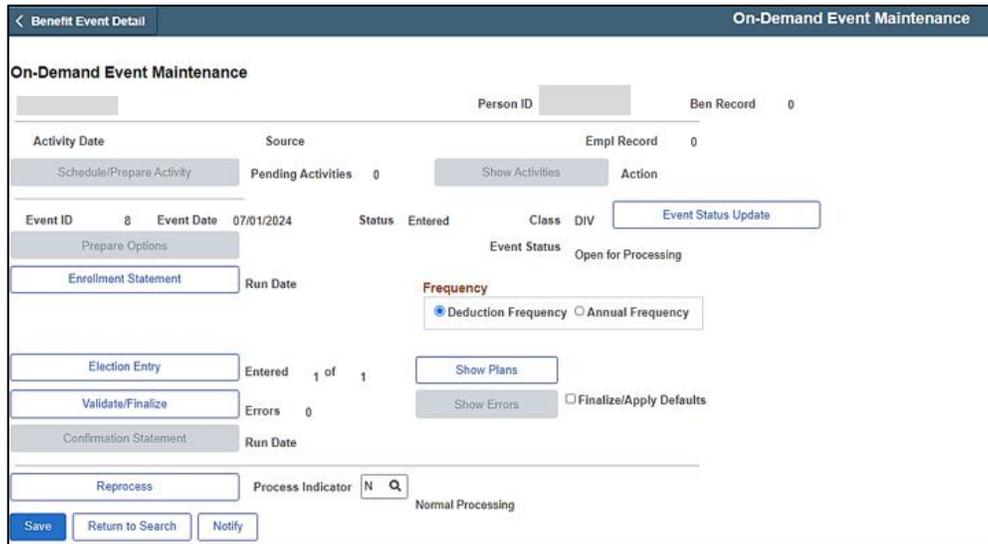
30. Once all elections have been made/updated, click the **OK** button at the bottom of the page.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

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

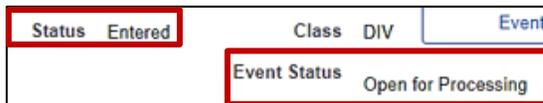


The screenshot shows the 'On-Demand Event Maintenance' interface. Key fields include:

- Status:** Entered
- Event Status:** Open for Processing
- Event ID:** 8
- Event Date:** 07/01/2024
- Frequency:** Deduction Frequency (selected)
- Process Indicator:** N



The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.



This close-up shows the 'Status' field containing the text 'Entered' and the 'Event Status' field containing the text 'Open for Processing'.

31.

Click the **Validate/Finalize** button.



The 'Validate/Finalize' button is highlighted with a red rectangular box.



This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.

A **Confirmation** message displays in a pop-up window once the process completes.



The confirmation message reads: "Process completed successfully. (3000,530)" with an "OK" button below it.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
32.	Click the OK button. 

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



The screenshot shows the 'On-Demand Event Maintenance' interface. At the top, there's a navigation bar with 'Benefit Event Detail' and 'On-Demand Event Maintenance'. Below that, the main content area displays various fields and buttons. The 'Status' field is set to 'Finalized - Enrolled' and 'Event Status' is 'Closed to Processing'. There are several buttons including 'Event Status Update', 'Show Plans', 'Show Errors', and 'Save'. The 'Save' button is highlighted with a red box in the original image.

	The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.
33.	Click the Save button. 
	This process is now complete. Refer to the Viewing the Employee’s Benefit Information section of this Job Aid for instructions on how to validate accuracy. Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee.

BN361_Creating and Completing a Life Event on behalf of an Employee**Creating and Processing a Birth Event on behalf of an Employee (with a tag along dependent and Flex Spending Dependent Care change)**

This section of the Job Aid should be referenced when creating and processing a Birth Event on behalf of the employee wherein one or more tag along dependents will also be added to the employee's coverage. The steps included in this section of the Job Aid are based on the following example scenario.

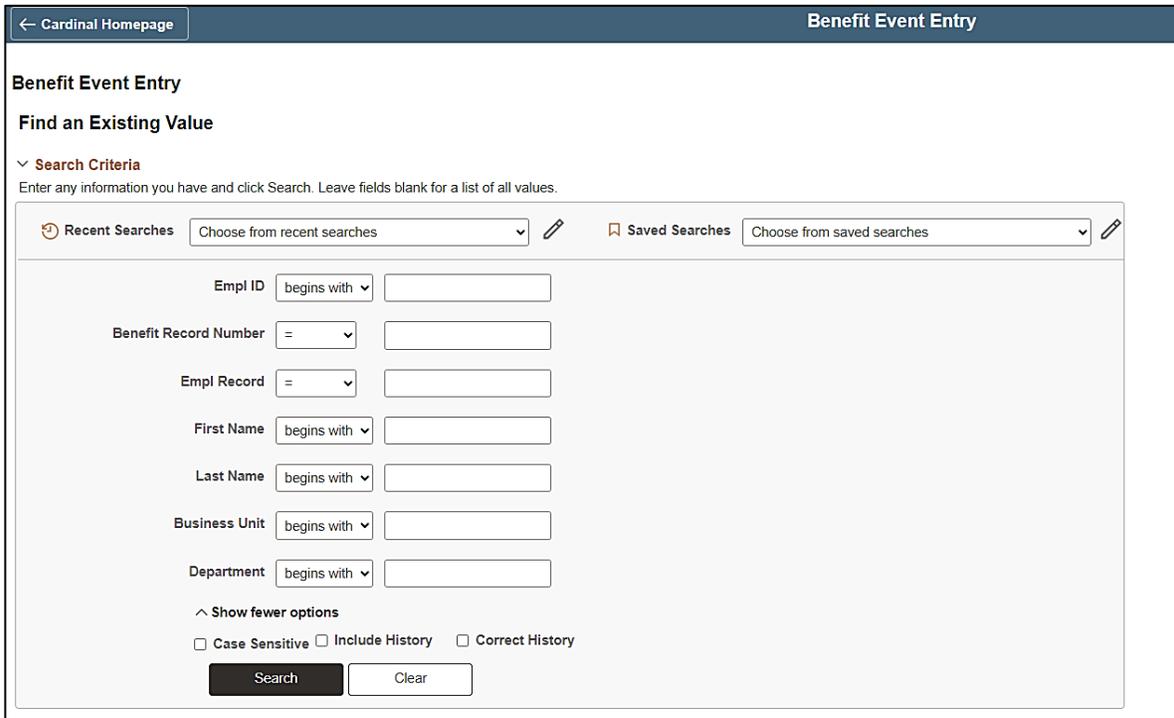
Scenario: An employee had a child born on 6/21/2024. This employee is currently enrolled in a "Single" coverage code Health Plan. The employee submitted the appropriate supporting documentation for the birth and a benefits enrollment request form on 6/24/2024 to add their new child as a dependent and enroll them in their benefits. Additionally, the employee now wants to add their spouse to their coverage as a tag along dependent (eligible based on the qualifying birth event). Finally, the employee also now wants to enroll in the Flex Spending Dependent Care plan. The employee did not initiate this Qualifying Mid-Year Birth Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process multiple Benefit Events for this employee based on the following guidelines:

- Separate Benefit Events must be created for each of these enrollment changes as they will have different coverage begin dates
- The Health Plan coverage begin date for the newborn child will be immediate on the child's date of birth (6/21/2024 in this scenario)
- The Health Plan coverage begin date for the employee's spouse will be the first of the month in which the paperwork was received (6/1/2024 in this scenario)
- The enrollment in the Flex Spending Dependent Care plan will be effective as of the first of the month following the employee's enrollment (7/1/2024 in this scenario)
- These Benefit Events must be processed in the correct order (based on the coverage begin and effective dates). Specifically in this scenario, the tag along dependent must be enrolled first because that Benefit Event has the earliest coverage begin date. Subsequently, the newborn child can be enrolled next (separate Benefit Event being processed), and finally, the Flex Spending Dependent Care Plan Benefit Event can be processed
- After the Benefit Event is processed to add the tag along dependent, the dependent' enrollment will be transmitted to the Health Vendor in the evening interface file. This must be completed before the Benefit Event to add the newborn child is processed. Therefore, the first Benefit Event to add the tag along dependent must be processed on one day (enrollment transmitted to the Health Vendor on that evening's interface file) and the Benefit Event to add the newborn child can be processed the next day (enrollment transmitted to the Health Vendor on that evening's interface file). These Benefit Events must be processed one day apart so that the Health Vendor is notified as of each effective date

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
1.	Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event

The **Benefit Event Entry Find an Existing Value** page displays.

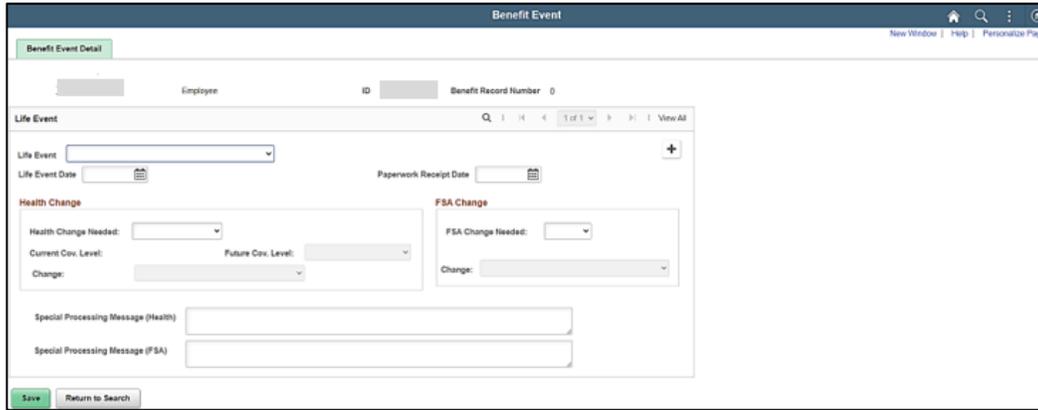


	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning .
2.	Enter the employee's Employee ID in the Search by field. 
	The other search by options available (Search by dropdown button) are Business Unit, Department, and Name.
3.	Click the Search button. 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Benefit Event** page displays for the applicable employee.



The screenshot shows the 'Benefit Event' page with the 'Life Event' dropdown menu open. The dropdown menu is currently empty, and the 'Life Event' label is highlighted with a red box.

- Click the **Life Event** dropdown button and select the applicable type of Life Event (Birth/Adoption in this scenario).

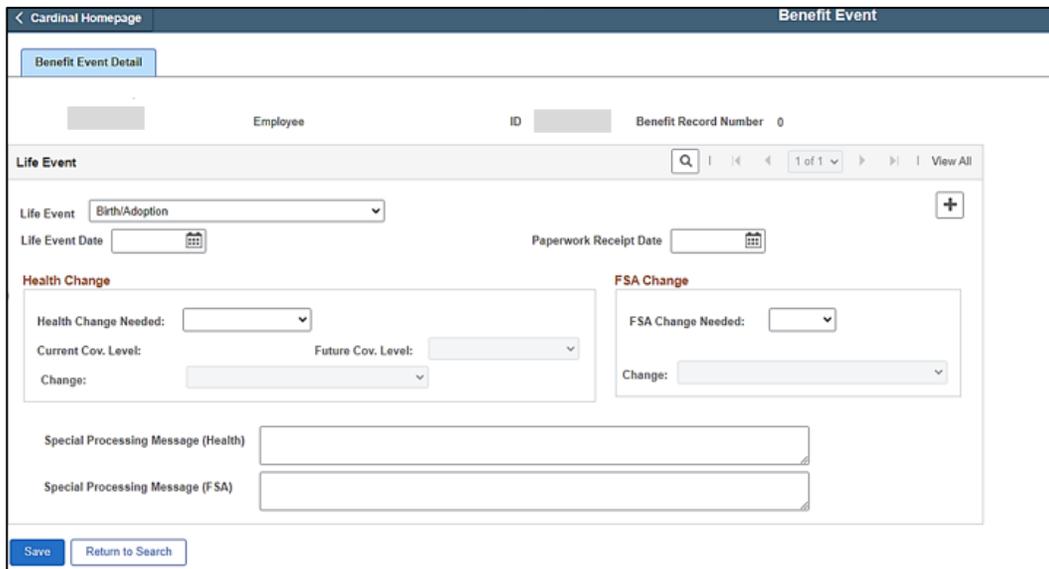


A close-up of the 'Life Event' dropdown menu, showing the text 'Life Event' and a red rectangular box around the dropdown arrow.



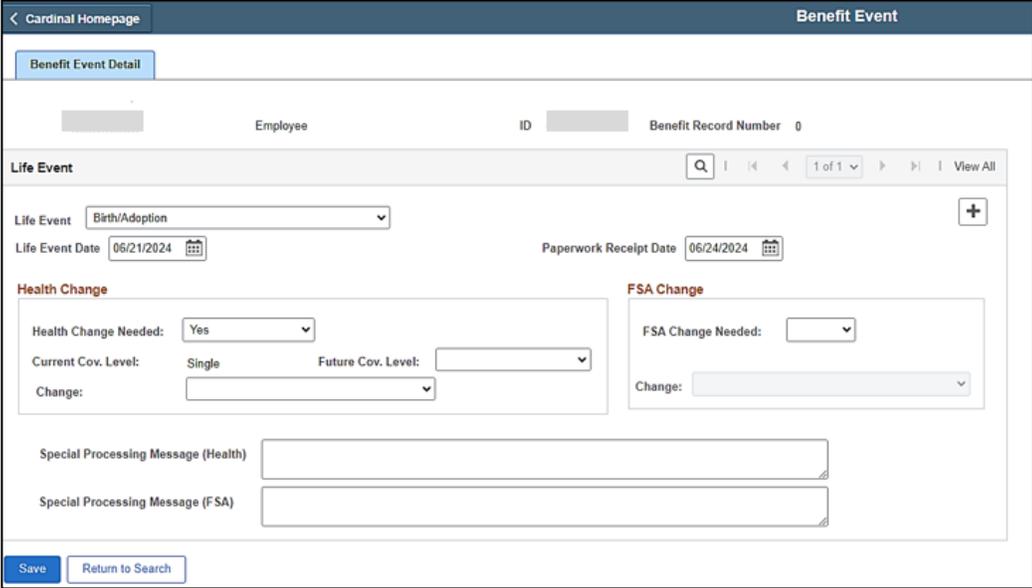
Although this Benefit Event is being utilized to add the tag along dependent and not the newborn child, "Birth/Adoption" is still the correct selection here as this is the Life Event that opened up the employee's eligibility to add the tag along dependent. The appropriate change reason associated with this selection will be made later in this process (Step 9).

The **Benefit Event** page redisplay with the selected Life Event.



The screenshot shows the 'Benefit Event' page with the 'Life Event' dropdown menu now displaying 'Birth/Adoption'. The 'Life Event' label is highlighted with a red box.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
5.	<p>Click the Life Event Date Calendar icon and select the applicable date (“6/21/2024” in this scenario).</p> <p>This is the date of the actual birth.</p> 
6.	<p>Click the Paperwork Receipt Date Calendar icon and select the applicable date (“6/24/2024” in this scenario)</p> <p>This is the date that the Benefits Enrollment form was received from the employee.</p> 
7.	<p>Click the Health Change Needed dropdown button and select “Yes”.</p> 
	<p>Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes”. If “Yes” is not selected, a Benefit Event will not be created.</p>
<p>The page refreshes.</p>	
	
	<p>The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.</p>

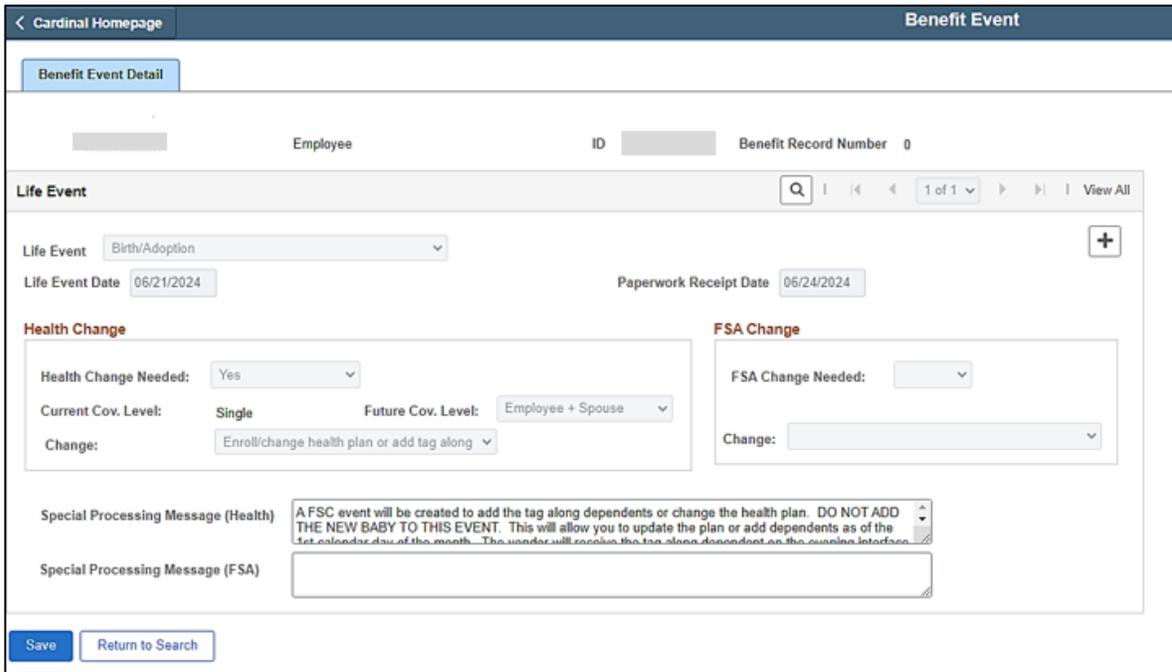
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
8.	Click the Future Cov. Level dropdown button and select the applicable coverage level. 
	The coverage levels available for selection are “Single, Employee”, “Employee + Spouse”, “Employee + CH (Child)”, and “Family”. Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed. For this Benefit Event, only select the applicable coverage code based on the tag along dependent(s) being added. The coverage code will be changed again as needed when the Birth Event to add the newborn is created.
9.	Click the Change dropdown button and select “Enroll/change health plan or add tag along dependent (1st of the month)”. The selections available will vary based on the type of Life Event previously selected. 
	Do not enter any information in the FSA Change section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.
10.	Click the Save button. 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The page refreshes after the save action completes.



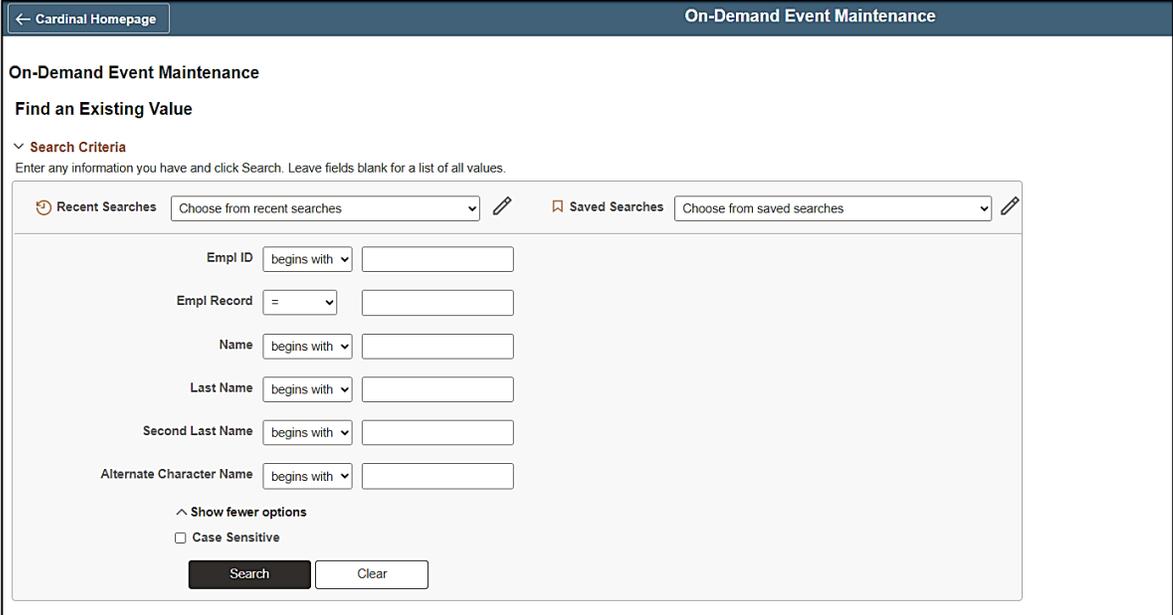

After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the **Special Processing Message (Health)** field and/or the **Special Processing Message (FSA)** field.

In this scenario, an FSC Benefit Event has been created solely for the purpose of adding and enrolling the employee's tag along dependent. This Benefit Event has a coverage begin date of the first of the current month ("6/1/2024" in this scenario). **Do not utilize this Benefit Event to add and enroll the newborn child dependent.**

The first Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.

11.

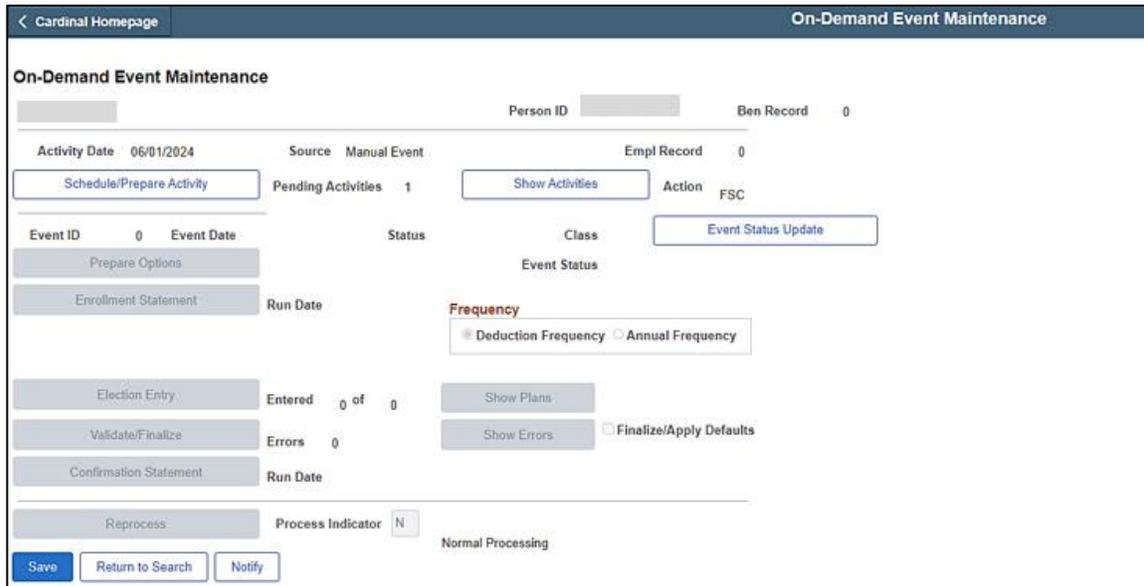
Navigate to the **On-Demand Event Maintenance** page using the following path:
NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
<p>12.</p>	<p>Enter the employee’s Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee’s name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
<p>13.</p>	<p>Click the Search button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

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




Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to add a tag along dependent based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the first day of the month wherein the birth took place (“6/1/2024” in this scenario). Ensure that this date is accurate.

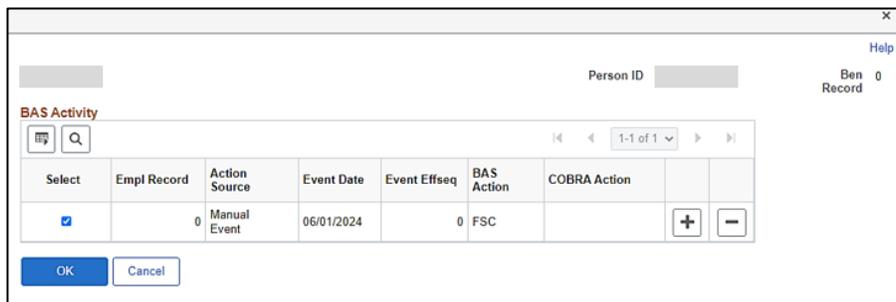
The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“FSC” in this scenario).

Activity Date	06/01/2024	Source	Manual Event
---------------	------------	--------	--------------

14. Click the **Show Activities** button.

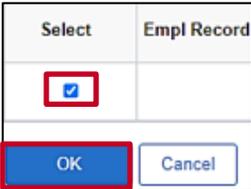
Show Activities

The **BAS Activity** page displays in a pop-up window.

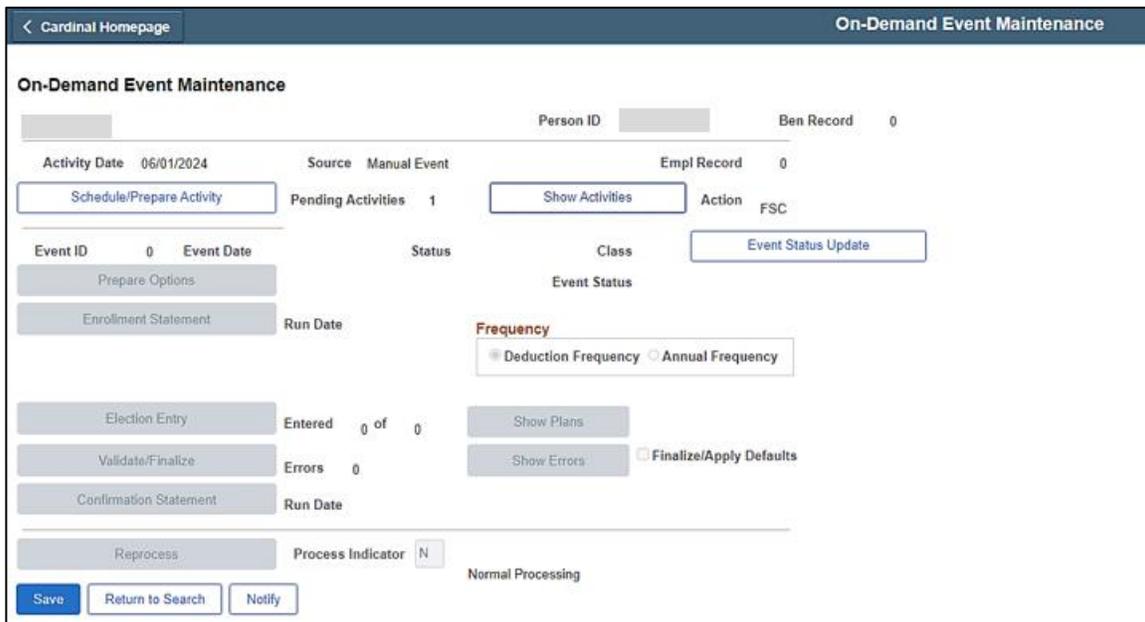


Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	06/01/2024	0	FSC	+ -

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
15.	<p>Ensure that the Select checkbox option for the Benefit Event is selected and then click the OK button.</p> 

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



On-Demand Event Maintenance

Person ID [redacted] Ben Record 0

Activity Date 06/01/2024 Source Manual Event Empl Record 0

Schedule/Prepare Activity Pending Activities 1 Show Activities Action FSC

Event ID 0 Event Date Status Class Event Status Update

Prepare Options Enrollment Statement Run Date

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 Notify

	If the Benefits Administration process has already run since the time the manual event was created, the Pending Activities field will display a “0”. In this case, proceed to Step 18.
16.	<p>If the Pending Activities field displays a “1”, click the Schedule/Prepare Activity button.</p> 
	Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.

BN361_Creating and Completing a Life Event on behalf of an Employee

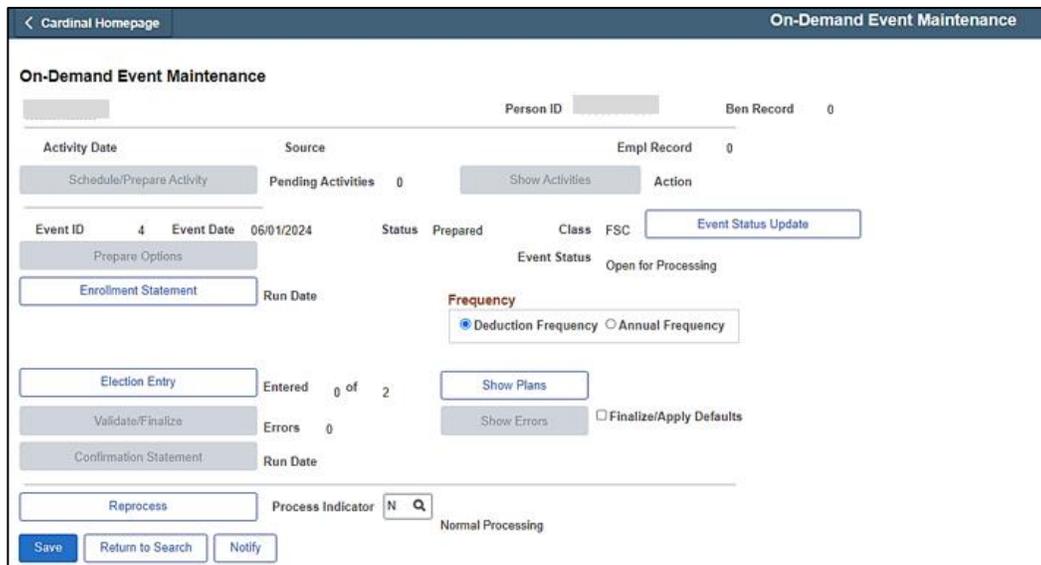
Step	Action
------	--------

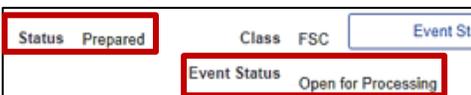
A **Confirmation** message displays in a pop-up window once the automated program completes.



17.	Click the OK button. 
-----	--

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

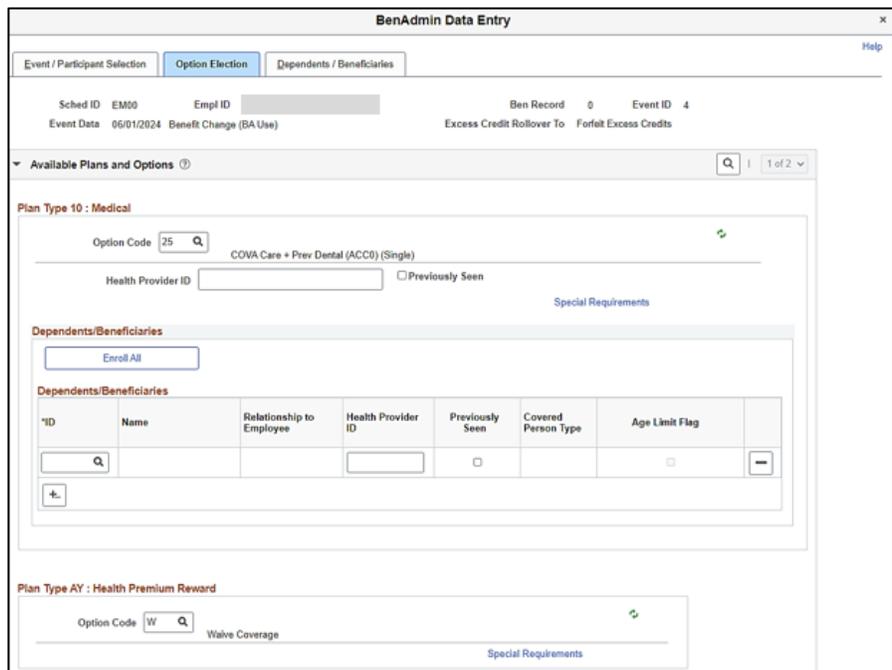


	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p>  <p>If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.</p>
---	---

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
18.	Click the Election Entry button. 

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.



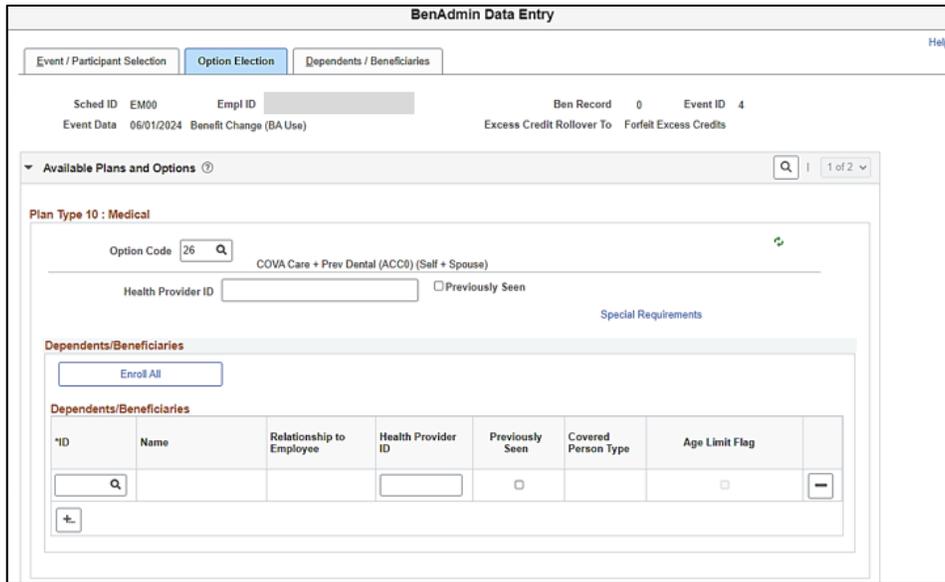
19.	<p>First, select the applicable Medical Plan based on the employee’s Benefits Enrollment form. Click the Option Code Look Up icon (magnifying glass) within the Plan Type 10: Medical section and select the applicable coverage code.</p> <p>The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child (except for Tricare), and 4 – Employee + 2 or More Dependents (Family – except for Tricare), 8 – Employee + Child(ren) (Tricare only), and 9 – Family (EE + SP + Child/ren for Tricare only).</p> 
-----	--

	<p>For this Benefit Event, only select the applicable coverage code based on the tag along dependent(s) being added. The coverage code will be changed again as needed when the Birth Event to add the newborn is processed.</p>
---	--

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Option Election** tab redispays.



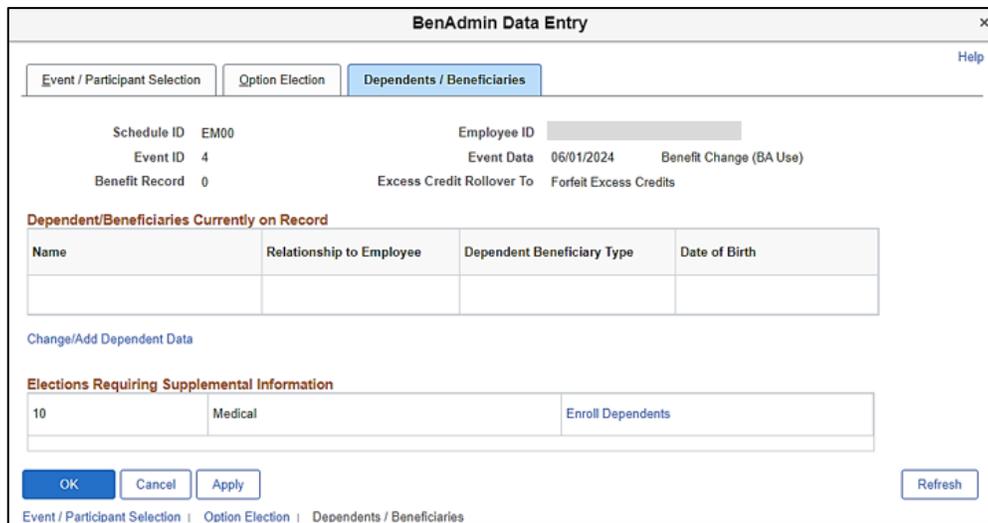
The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The interface includes fields for 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Key information displayed includes: Schedule ID EM00, Employee ID (redacted), Ben Record 0, and Event ID 4. The event data is 06/01/2024, Benefit Change (BA Use). Under 'Available Plans and Options', 'Plan Type 10 : Medical' is selected with 'Option Code 26'. The plan description is 'COVA Care + Prev Dental (AC0) (Self + Spouse)'. There is a 'Health Provider ID' field and a 'Previously Seen' checkbox. Below this is a section for 'Dependents/Beneficiaries' with an 'Enroll All' button and a table with columns: *ID, Name, Relationship to Employee, Health Provider ID, Previously Seen, Covered Person Type, and Age Limit Flag.

20. Next, add the tag along dependent(s). Click the **Dependents / Beneficiaries** tab.



The screenshot shows the top navigation tabs of the BenAdmin Data Entry window: 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Dependents / Beneficiaries' tab is highlighted with a red rectangular box.

The **Dependent / Beneficiaries** tab displays.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. It displays the same header information as the previous screenshot. Below the header, there is a section titled 'Dependent/Beneficiaries Currently on Record' with a table with columns: Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. Below this table is a link 'Change/Add Dependent Data'. There is also a section for 'Elections Requiring Supplemental Information' with a table showing '10' for Plan Type and 'Medical' for Plan Name, with an 'Enroll Dependents' button. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.

21. Click the **Change/Add Dependent Data** link.

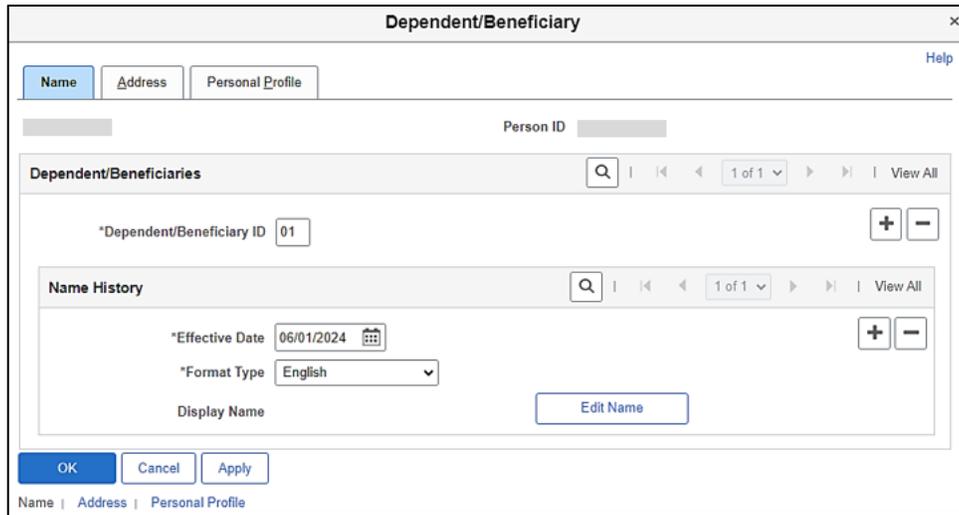


The screenshot shows the 'Change/Add Dependent Data' link highlighted with a red rectangular box.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.



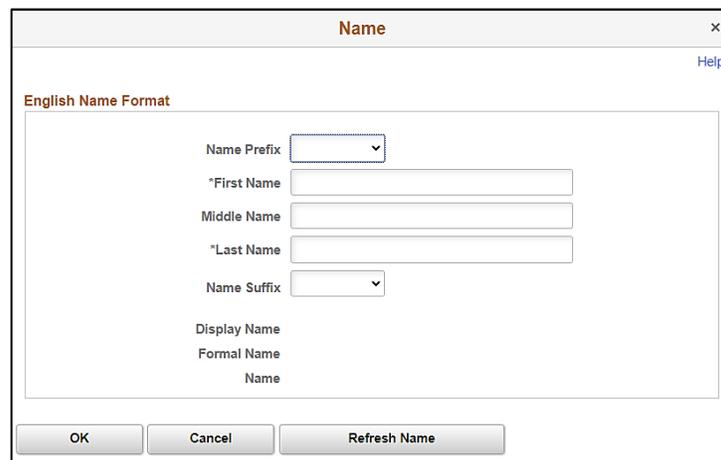

For Life Events, the **Effective Date** field defaults to the date that the coverage will begin (in this scenario, a tag along dependent is being added based on a Birth event. Therefore, the **Effective Date** field defaults to the first day of the month wherein the birth took place). Do not change this date as it must match the Event Date, or the system will not recognize this dependent as eligible for coverage. The **Dependent/Beneficiary ID** field will default to the next available Dependent/Beneficiary ID number ("01" in this scenario) and increment by 1 for each additional dependent subsequently added.

22.

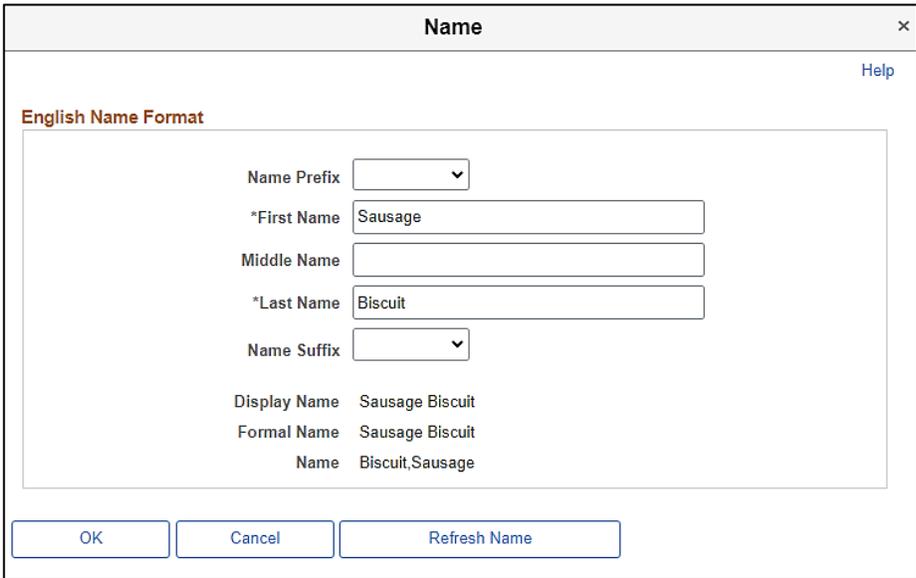
Click the **Edit Name** button.



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



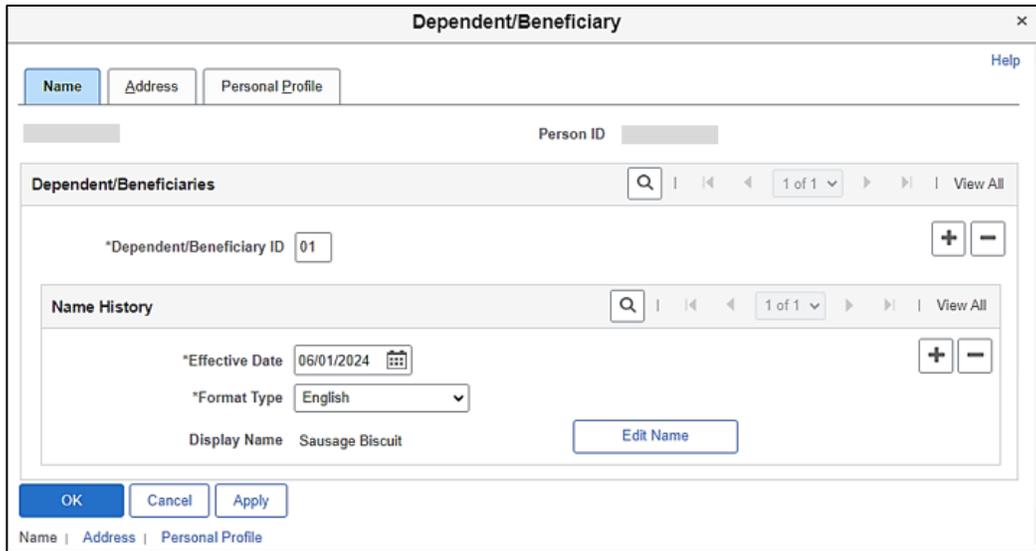
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
23.	<p>At a minimum, enter the dependent's first and last name in the corresponding fields. The Name Prefix, Middle Name, and Name Suffix fields are optional but should be entered as applicable.</p> 
24.	<p>Click the Refresh Name button.</p> 
<p>The Name page refreshes.</p> 	
	<p>The Display Name, Formal Name, and Name fields will populate based on the name information entered.</p>
25.	<p>Click the OK button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Name** tab redisplay.



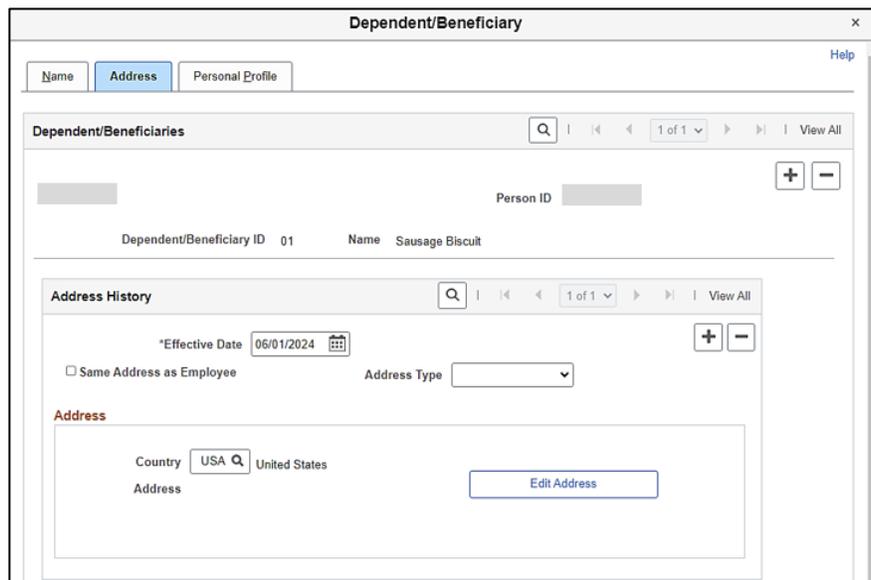

The **Display Name** field auto-populates with the name information previously entered.

26.

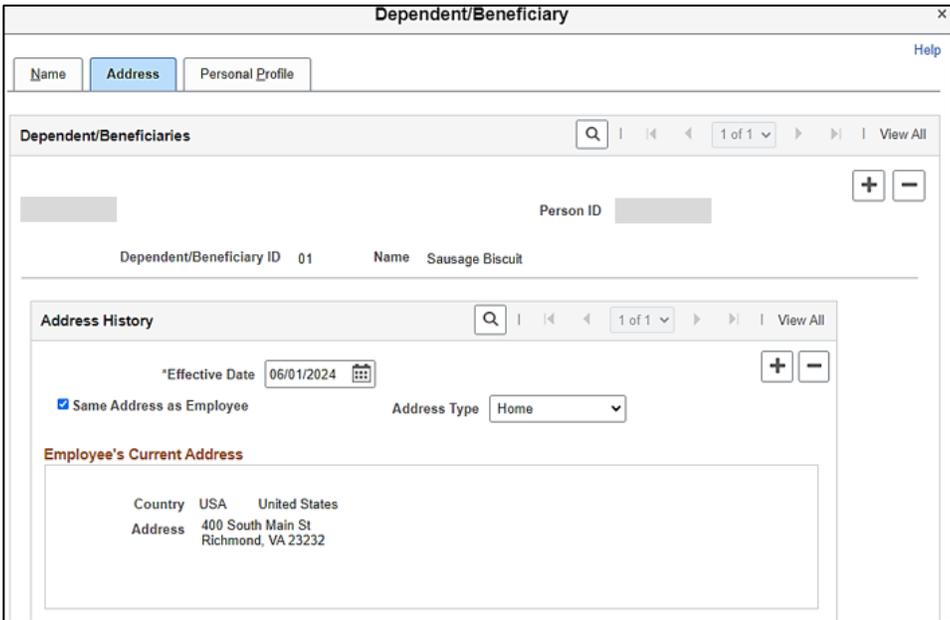
Click the **Address** tab.



The **Address** tab displays.



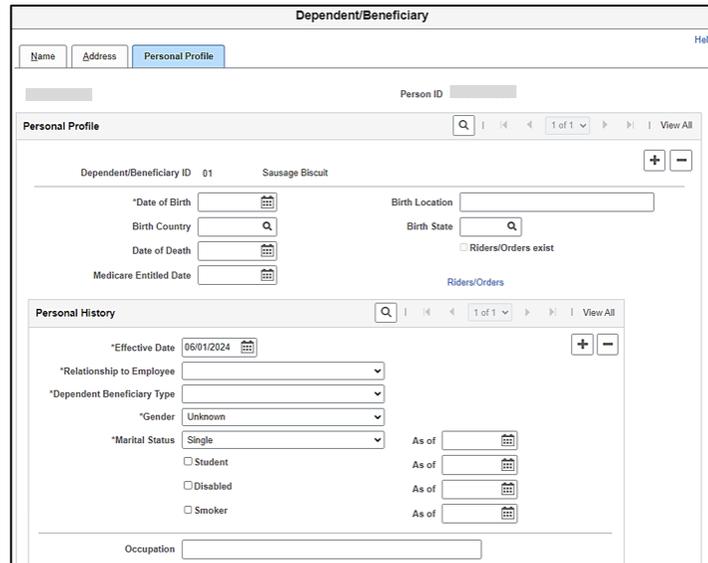
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
27.	Complete the address information as applicable for the dependent by Clicking the Same Address as Employee checkbox option (applicable for this scenario). 
	Users can also complete the address information as applicable for the dependent by selecting the applicable Address Type using the dropdown button provided and then clicking the Edit Address button (the Edit Address page will display in a pop-up window and the applicable address information can be entered).
<p>The Address tab refreshes.</p> 	
	The address information auto-populates in the Employee's Current Address section.
28.	Click the Personal Profile tab. 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Personal Profile** tab displays.




The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The **Student** and **Smoker** checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor).

29.

Click the **Date of Birth Calendar** icon and select the dependent's date of birth.



30.

Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee ("Spouse" in this scenario).



31.

Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent".



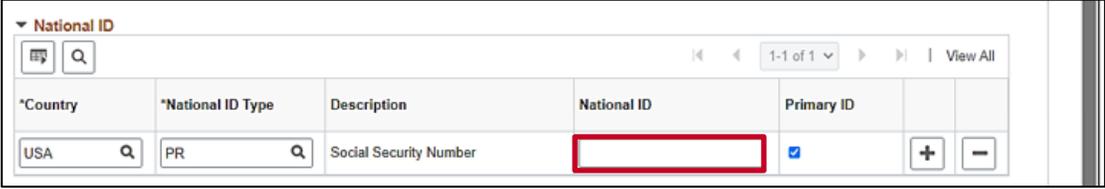

"Approved Dependent" is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.

32.

Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Female" in this example).



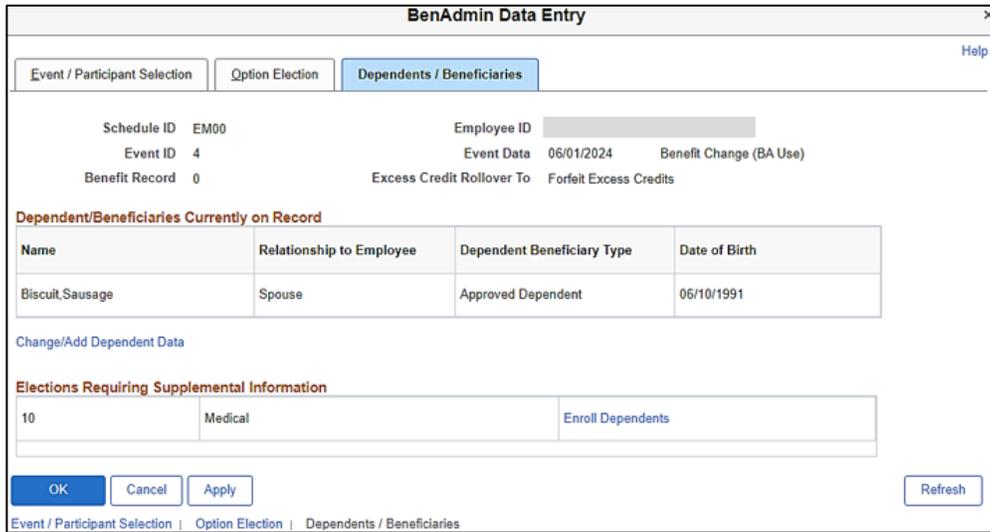
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
33.	<p>The Marital Status field defaults to “Single”. Update as needed for the dependent (“Married” in this scenario).</p> 
	<p>If any status other than “Single” is selected, select the applicable date using the Marital Status As of Calendar icon (“4/22/2020” in this scenario).</p>
34.	Click the vertical scrollbar to scroll down on the page to the National ID section.
35.	<p>Enter the dependent’s Social Security Number (SSN) in the National ID field.</p> 
	<p>If the employee did not provide the dependent’s SSN, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.</p>
36.	<p>Click the OK button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Dependents / Beneficiaries** tab redisplay.



BenAdmin Data Entry

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

Schedule ID EM00 Employee ID [REDACTED]
 Event ID 4 Event Data 06/01/2024 Benefit Change (BA Use)
 Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Biscuit,Sausage	Spouse	Approved Dependent	06/10/1991

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-------------------

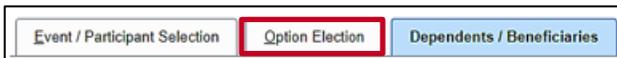
OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries



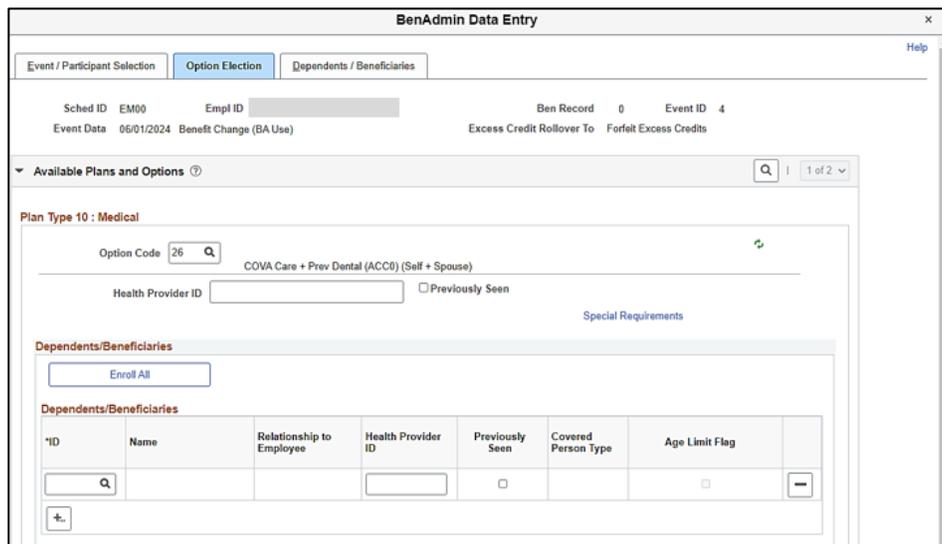
The dependent just added displays in the **Dependent/Beneficiaries Currently on Record** section. If additional tag along dependents needs to be added, repeat Steps 24 – 39 for each additional tag along dependent (in this scenario, no additional tag along dependents are being added).

37. Click the **Option Election** tab.



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

The **Option Election** tab redisplay.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID [REDACTED] Ben Record 0 Event ID 4
 Event Data 06/01/2024 Benefit Change (BA Use) Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options 1 of 2

Plan Type 10 : Medical

Option Code 26 COVA Care + Prev Dental (ACC6) (Self + Spouse)
 Health Provider ID [REDACTED] Previously Seen Special Requirements

Dependents/Beneficiaries

Enroll All

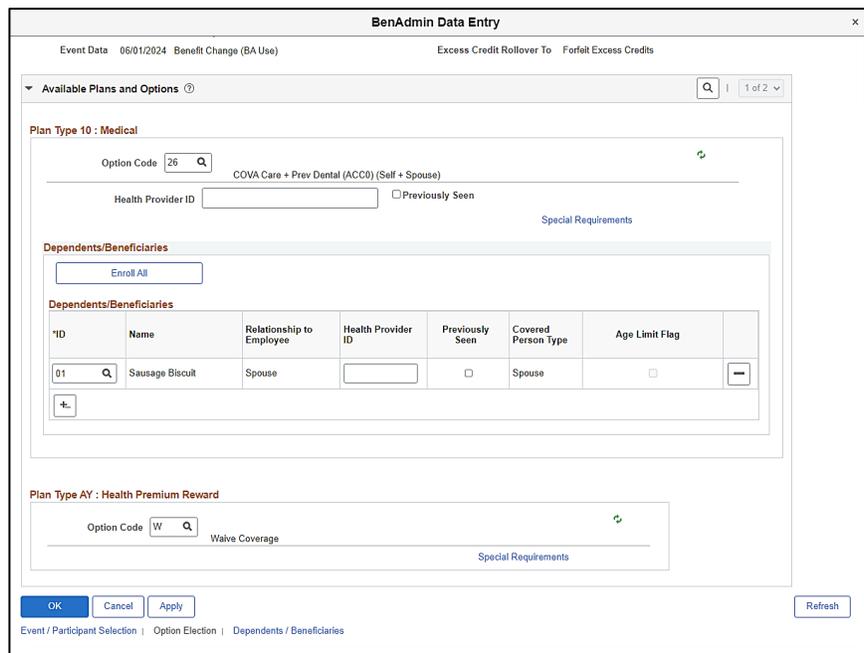
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag
[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	<input type="checkbox"/>	[REDACTED]	<input type="checkbox"/>

+ -

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
38.	Next, enroll the dependent(s) in the previously selected Medical Plan by clicking the Enroll All button if all dependents will be enrolled (applicable for this scenario). 
	Users can also enroll the dependent(s) in the previously selected Medical Plan by adding the applicable dependents individually using the ID Look Up icon within the Dependents/Beneficiaries section. Additional rows can be added in this section by clicking the Add Multiple Rows icon (+...).

The page refreshes.

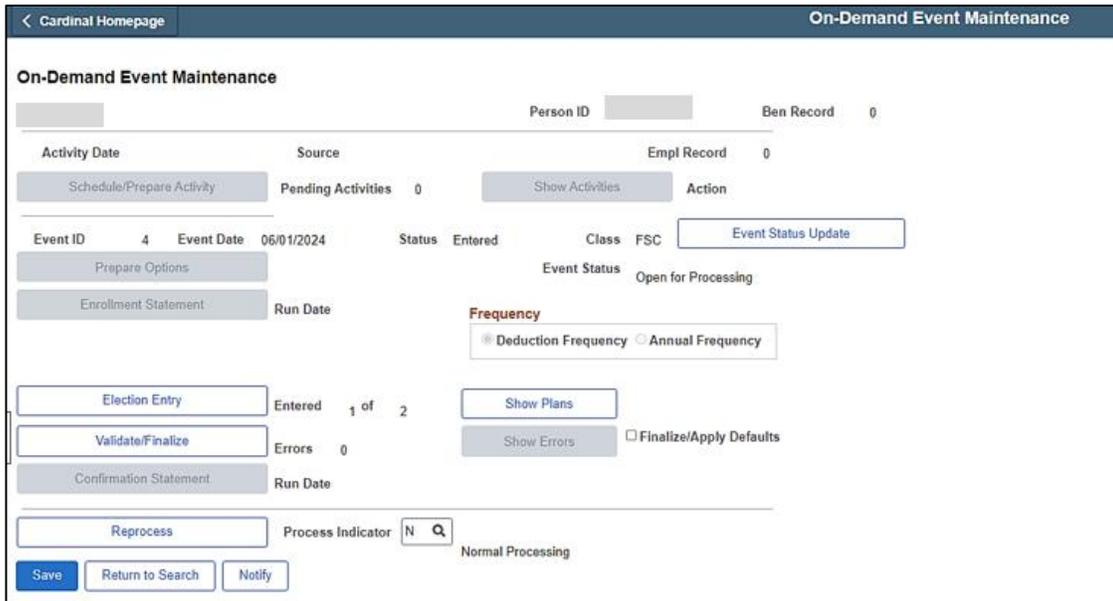


	The dependents enrolled display in the Dependents/Beneficiaries section. Validate for accuracy and ensure that all applicable dependents are listed.
39.	Click the OK button. 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

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




The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.

40.

Click the **Validate/Finalize** button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.



A **Confirmation** message displays in a pop-up window once the process completes.

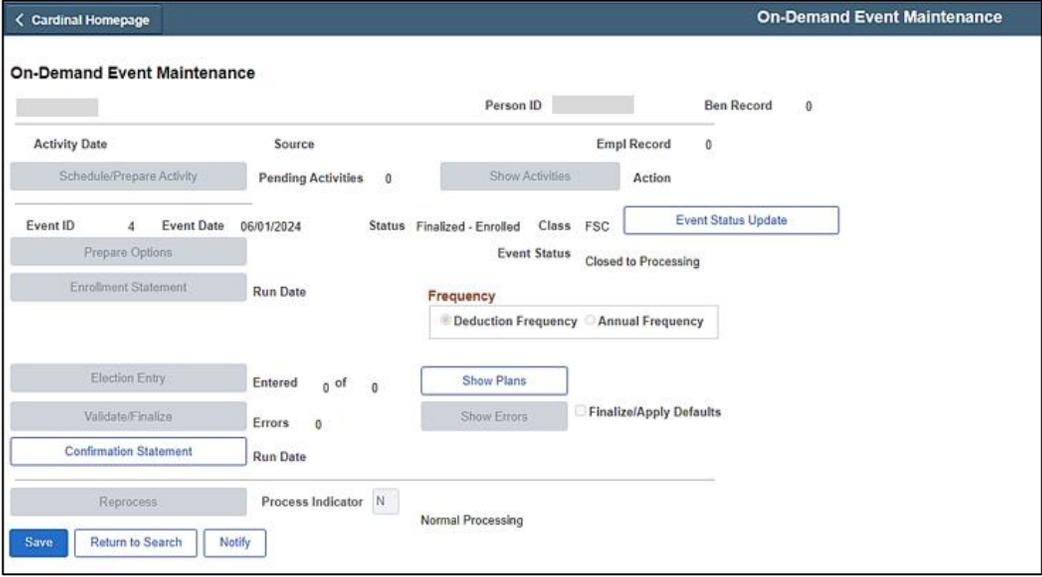
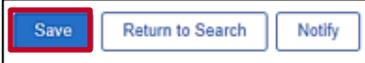


41.

Click the **OK** button.



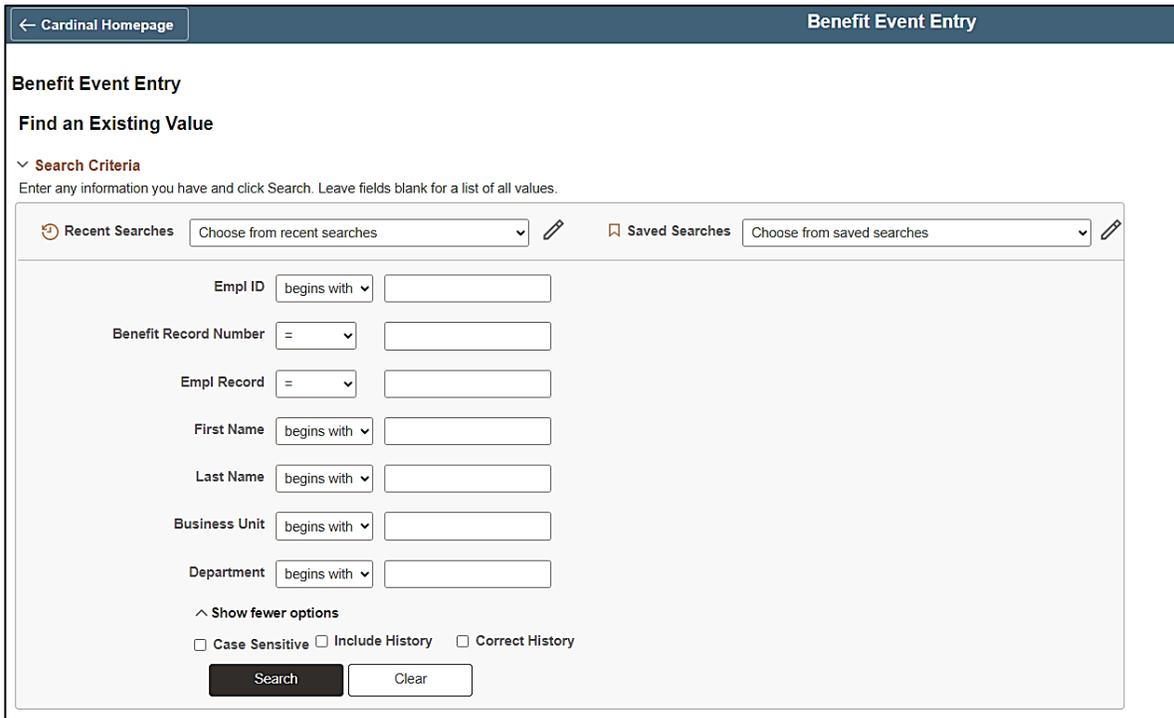
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.</p>
42.	<p>Click the Save button.</p> 
	<p>This Benefit Event to add the tag along dependent(s) is now complete. Refer to the Viewing the Employee’s Benefit Information section of this Job Aid for instructions on how to validate accuracy. Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee. This information will be transmitted to the Health Vendor in the evening interface file. On the next business day, proceed with Step 43.</p> <p>Next, the Benefit Event must be created in order to add the newborn child dependent.</p>
43.	<p>Navigate to the Benefit Event page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Benefit Event Entry Find an Existing Value** page displays.




For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

44.

Enter the employee's Employee ID in the **Empl ID** field.
The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.



45.

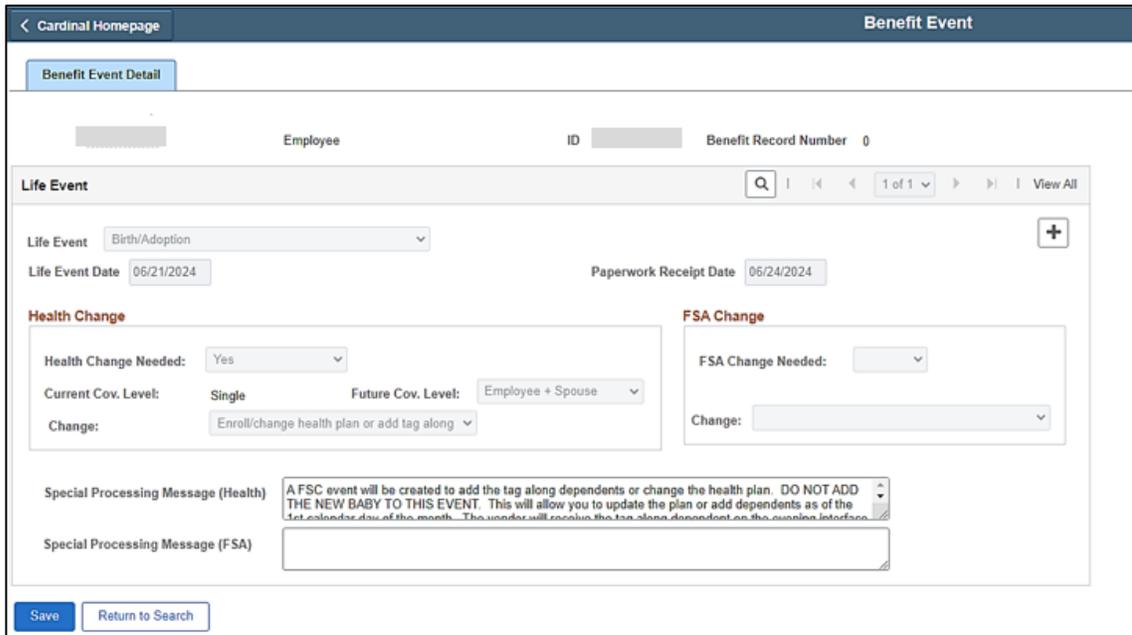
Click the **Search** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Benefit Event** page displays for the applicable employee.



The screenshot shows the 'Benefit Event' page for an employee. At the top, there is a navigation bar with 'Cardinal Homepage' and 'Benefit Event'. Below this is a 'Benefit Event Detail' section. The page displays a single row in a table with the following fields:

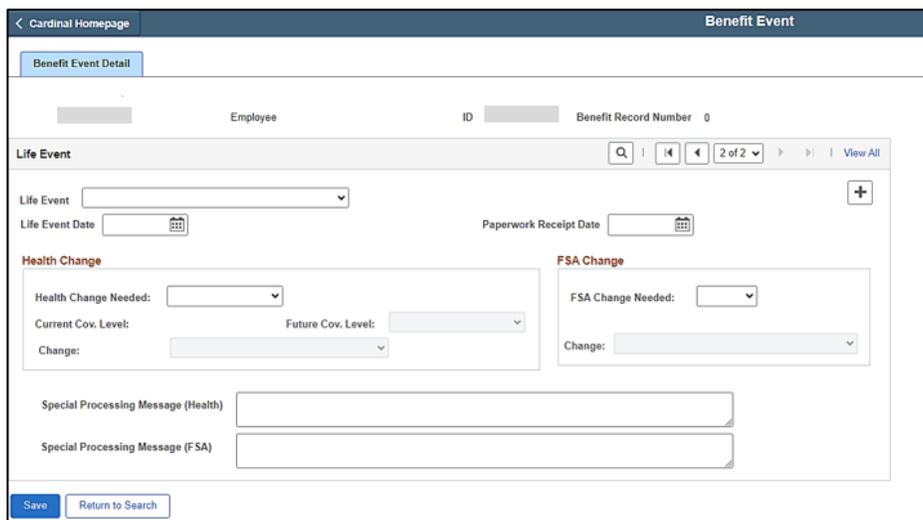
- Life Event:** Birth/Adoption (dropdown), with a '+' icon to add a new row.
- Life Event Date:** 06/21/2024
- Paperwork Receipt Date:** 06/24/2024
- Health Change:**
 - Health Change Needed: Yes (dropdown)
 - Current Cov. Level: Single
 - Future Cov. Level: Employee + Spouse (dropdown)
 - Change: Enroll/change health plan or add tag along (dropdown)
- FSA Change:**
 - FSA Change Needed: (dropdown)
 - Change: (dropdown)
- Special Processing Message (Health):** A FSC event will be created to add the tag along dependents or change the health plan. DO NOT ADD THE NEW BABY TO THIS EVENT. This will allow you to update the plan or add dependents as of the 1st calendar day of the month. The worker will receive the tag along dependent on the online interface.
- Special Processing Message (FSA):** (empty text area)

At the bottom of the form, there are 'Save' and 'Return to Search' buttons.

46. Click the **Add a new row** icon (+).



The page refreshes and the new row displays.

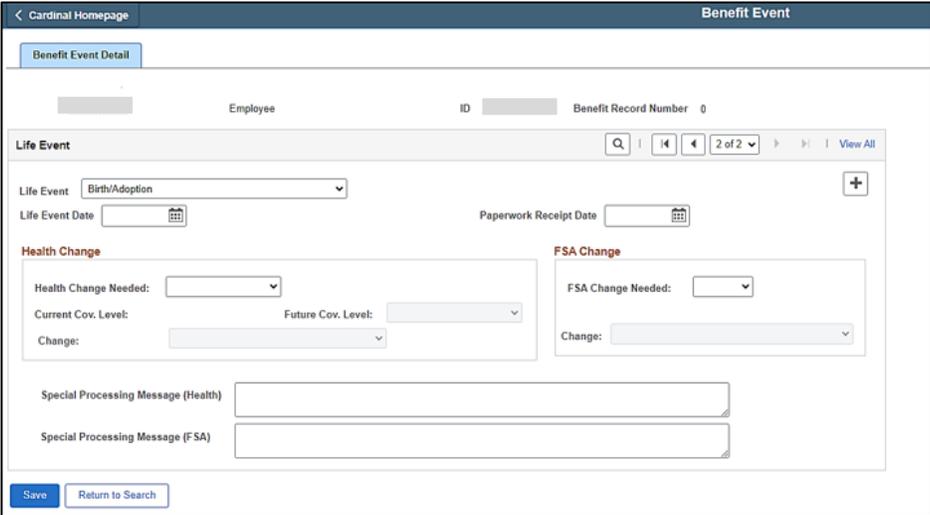


The screenshot shows the 'Benefit Event' page after a refresh. The table now displays two rows. The first row is identical to the one in the previous screenshot. The second row is a new, empty row with the following fields:

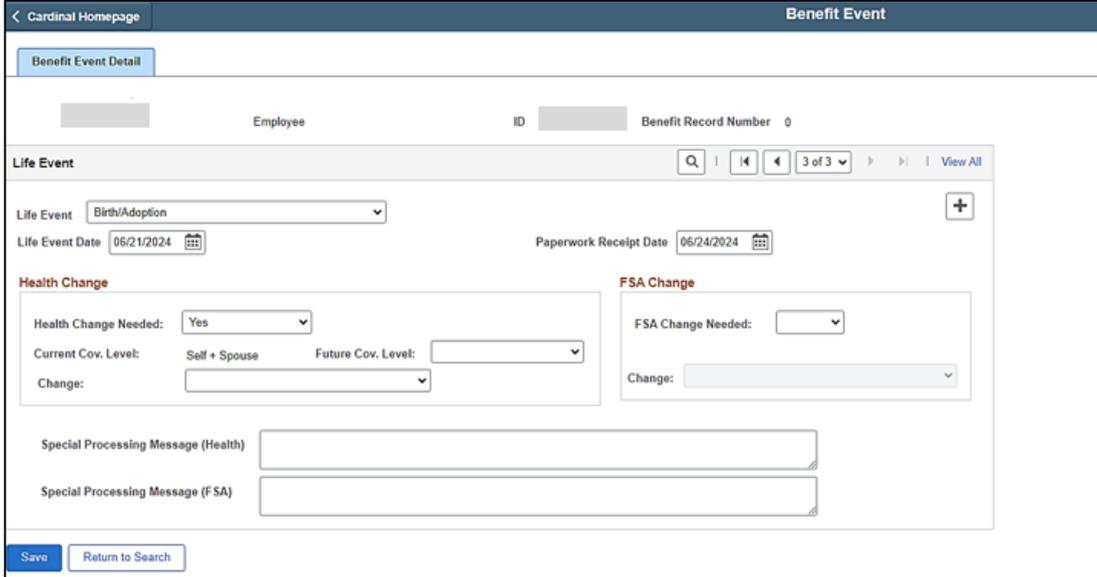
- Life Event:** (empty dropdown), with a '+' icon to add a new row.
- Life Event Date:** (empty date field)
- Paperwork Receipt Date:** (empty date field)
- Health Change:**
 - Health Change Needed: (empty dropdown)
 - Current Cov. Level: (empty dropdown)
 - Future Cov. Level: (empty dropdown)
 - Change: (empty dropdown)
- FSA Change:**
 - FSA Change Needed: (empty dropdown)
 - Change: (empty dropdown)
- Special Processing Message (Health):** (empty text area)
- Special Processing Message (FSA):** (empty text area)

At the bottom of the form, there are 'Save' and 'Return to Search' buttons.

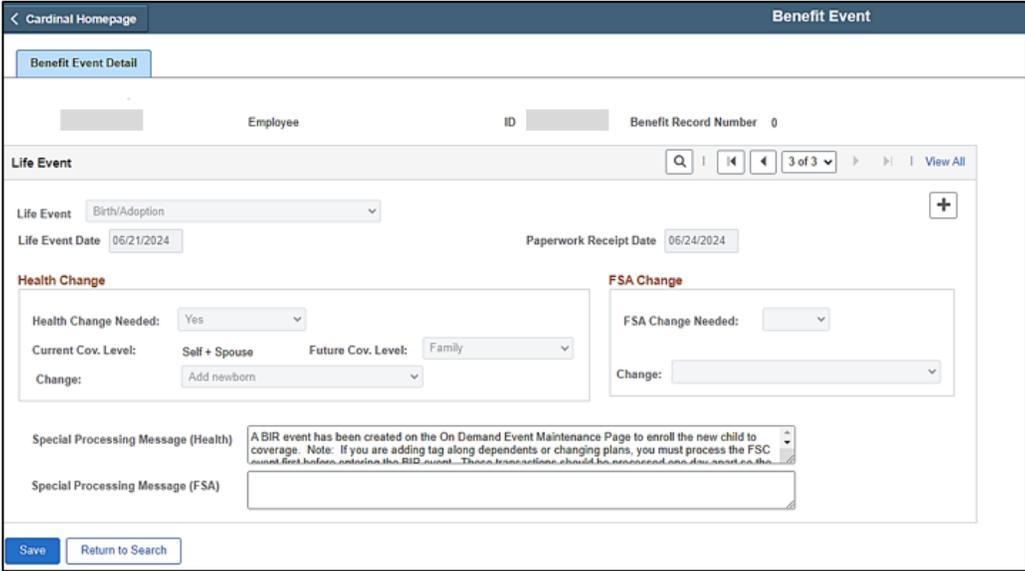
BN361_Creating and Completing a Life Event on behalf of an Employee

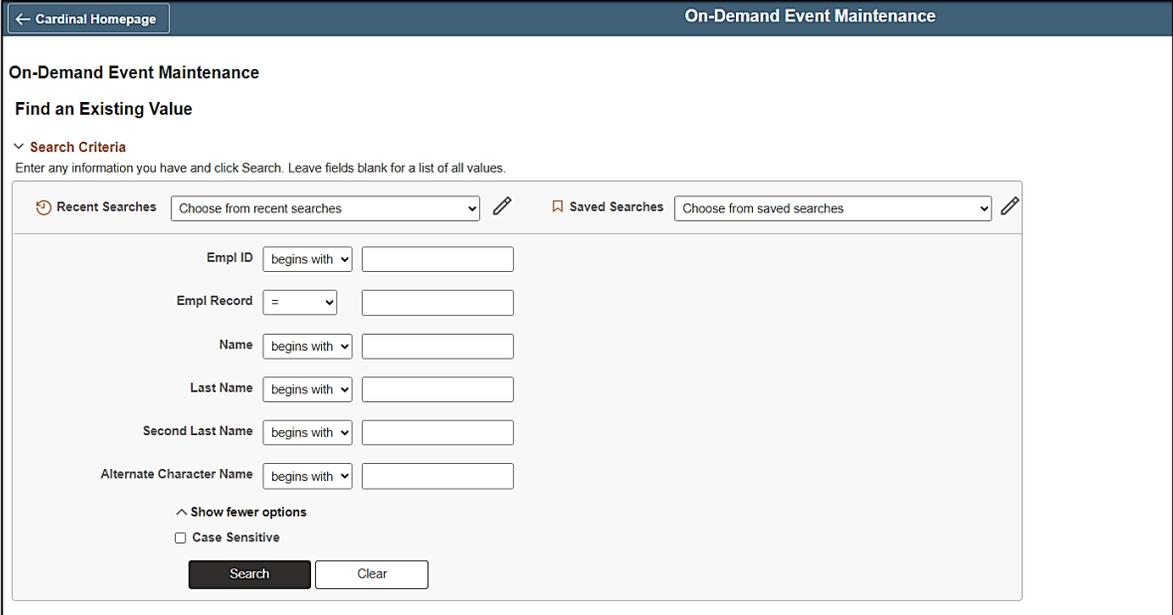
Step	Action
47.	Click the Life Event dropdown button and select the applicable type of Life Event (Birth/Adoption in this scenario). 
The Benefit Event page redispays with the selected Life Event. 	
48.	Click the Life Event Date Calendar icon and select the applicable date (“6/21/2024” in this scenario). This is the date of birth for the newborn dependent. 
49.	Click the Paperwork Receipt Date Calendar icon and select the applicable date (“6/24/2024” in this scenario). This is the date that the Benefits Enrollment form was received from the employee. 
50.	Click the Health Change Needed dropdown button and select “Yes”. 
	Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes”. If “Yes” is not selected, a Benefit Event will not be created.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The page refreshes.</p> 
	<p>The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.</p>
<p>51.</p>	<p>Click the Future Cov. Level dropdown button and select the applicable coverage level.</p> 
	<p>The coverage levels available for selection are “Single, Employee”, “Employee + Spouse”, “Employee + CH (Child)”, and “Family”. Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed. For this Benefit Event, select the applicable coverage code based on the newborn dependent being added.</p>
<p>52.</p>	<p>Click the Change dropdown button and select “Add newborn”. The selections available will vary based on the type of Life Event previously selected.</p> 
	<p>Do not enter any information in the FSA Change section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

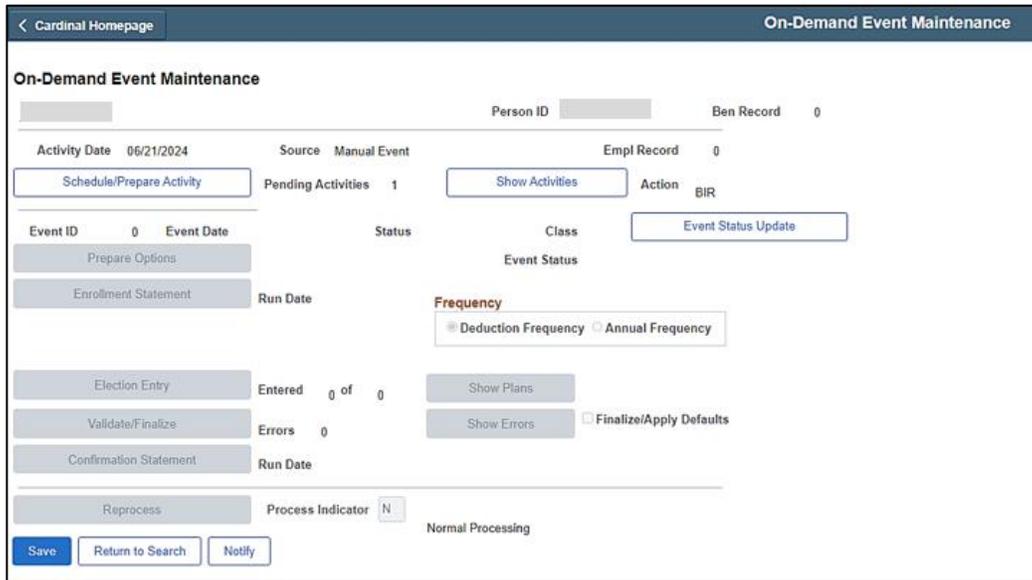
Step	Action
53.	Click the Save button. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <input style="border: 1px solid red; padding: 2px 10px;" type="button" value="Save"/> <input style="padding: 2px 10px;" type="button" value="Return to Search"/> </div>
	<p>The page refreshes after the save action completes.</p> 
	<p>After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field.</p> <p>In this scenario, a BIR Benefit Event has been created for the purpose of adding and enrolling the employee’s newborn dependent. This Benefit Event has a coverage begin date of the actual date of birth (“6/21/2024” in this scenario).</p> <p>This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.</p>
54.	Navigate to the On-Demand Event Maintenance page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

Step	Action
	<p>The On-Demand Event Maintenance Search page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
<p>55.</p>	<p>Enter the employee’s Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee’s name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> 
<p>56.</p>	<p>Click the Search button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

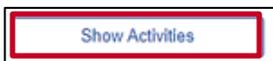
The **On-Demand Event Maintenance** page displays for the applicable employee.



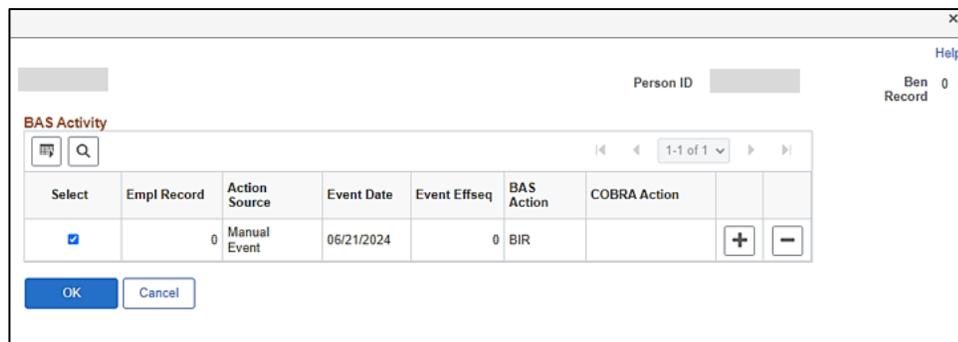

Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to add a newborn dependent based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the date of birth (“6/21/2024” in this scenario). Ensure that this date is accurate.

The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“BIR” in this scenario).

57. Click the **Show Activities** button.

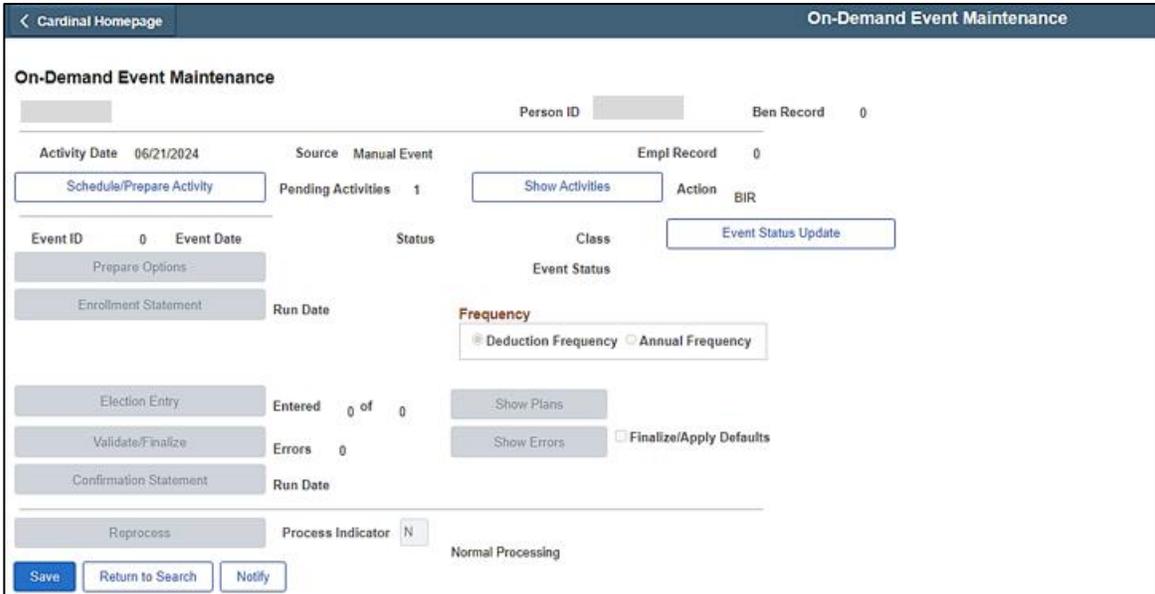
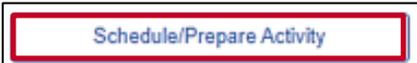


The **BAS Activity** page displays in a pop-up window.



Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	06/21/2024	0	BIR	

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
58.	<p>Ensure that the Select checkbox option for the Benefit Event is selected and then click the OK button.</p> 
<p>The On-Demand Event Maintenance page redispays.</p>	
	
59.	<p>If the Benefits Administration process has already run since the time the manual event was created, the Pending Activities field will display a “0”. In this case, proceed to Step 68. If the Pending Activities field displays a “1”, click the Schedule/Prepare Activity button.</p> 
	<p>Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

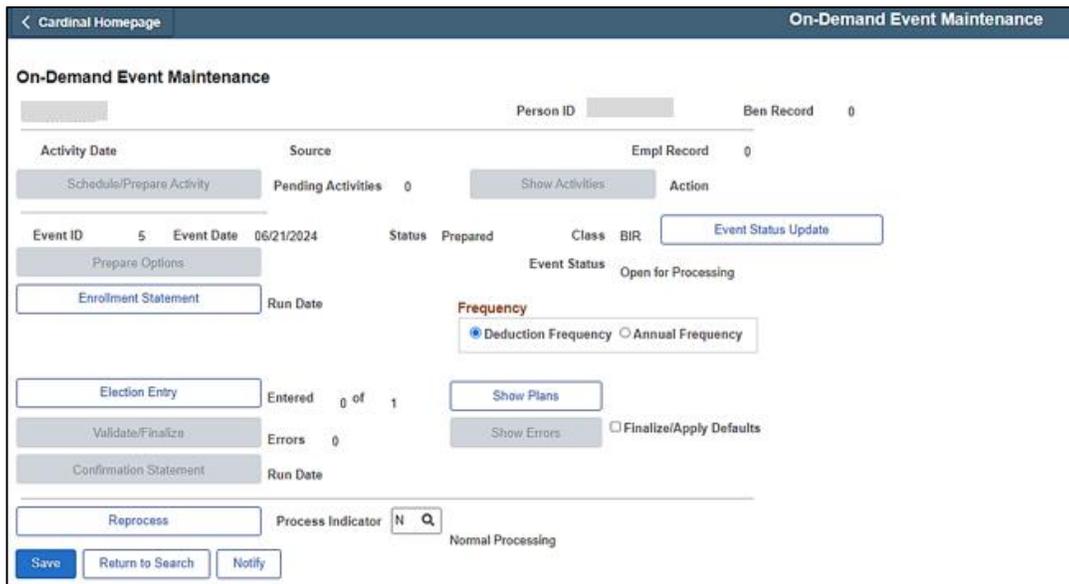
Step	Action
------	--------

A **Confirmation** message displays in a pop-up window once the automated program completes.



60.	Click the OK button. 
-----	--

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

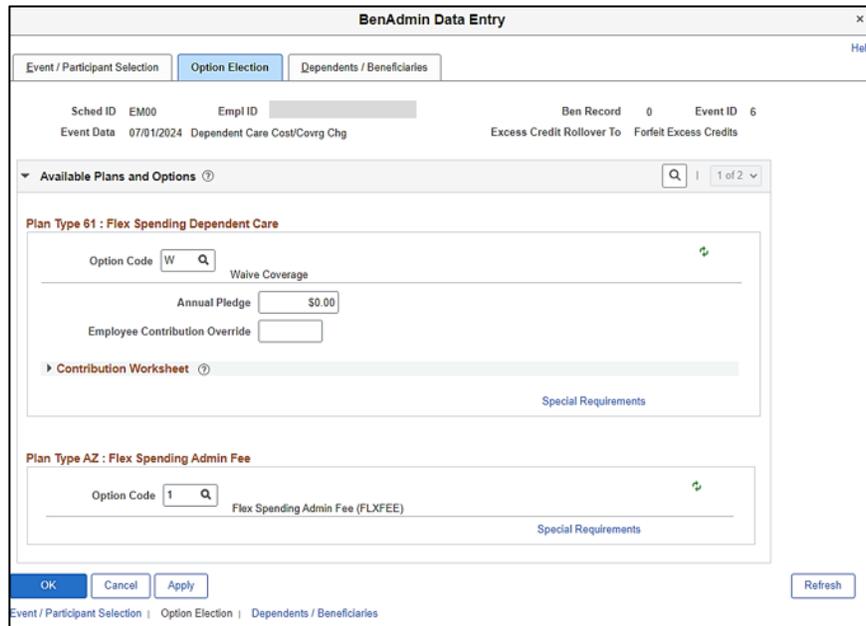


	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.  If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.
---	---

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
61.	Click the Election Entry button. 

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.



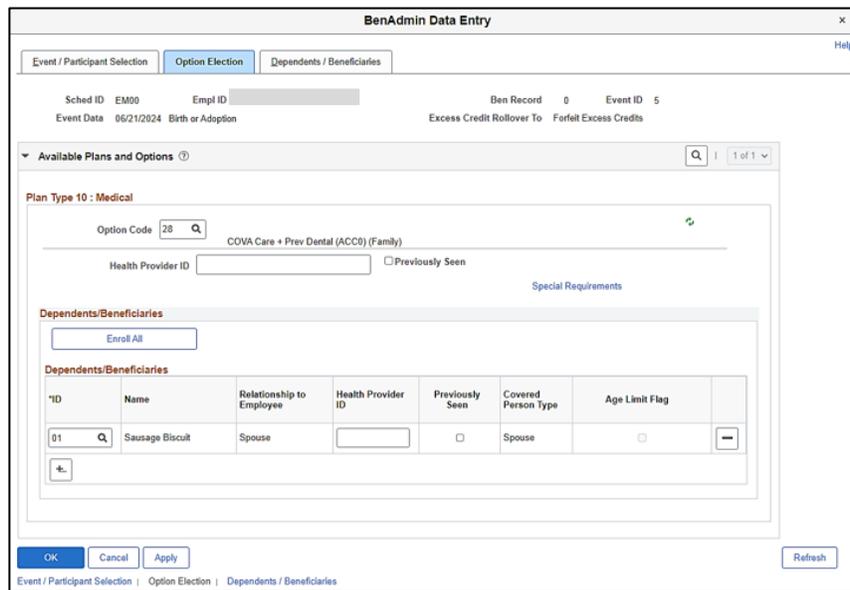
62.	First, select the applicable Medical Plan based on the employee’s Benefits Enrollment form. Click the Option Code Look Up icon (magnifying glass) within the Plan Type 10: Medical section and select the applicable coverage code. The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child (except for Tricare), and 4 – Employee + 2 or More Dependents (Family – except for Tricare), 8 – Employee + Child(ren) (Tricare only), and 9 – Family (EE + SP + Child/ren for Tricare only). 
-----	--

	For this Benefit Event, select the applicable coverage code based on the newborn dependent being added. If the coverage code does not need to be changed based on the addition of the newborn dependent, proceed with Step 63. Please note that this Birth Event only allows the employee to change the coverage code. The actual Health Plan election cannot be changed.
---	---

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Option Election** tab redispays.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. The window displays event details (Sched ID: EM00, Event Data: 06/21/2024 Birth or Adoption) and a list of available plans. The selected plan is 'Plan Type 10: Medical' with Option Code '28'. Below the plan details, there is a table for 'Dependents/Beneficiaries' with one entry: ID '01', Name 'Sausage Biscuit', Relationship to Employee 'Spouse', and Covered Person Type 'Spouse'. The 'Dependents/Beneficiaries' tab is highlighted in the screenshot.

63. Next, add the newborn dependent. Click the **Dependents / Beneficiaries** tab.

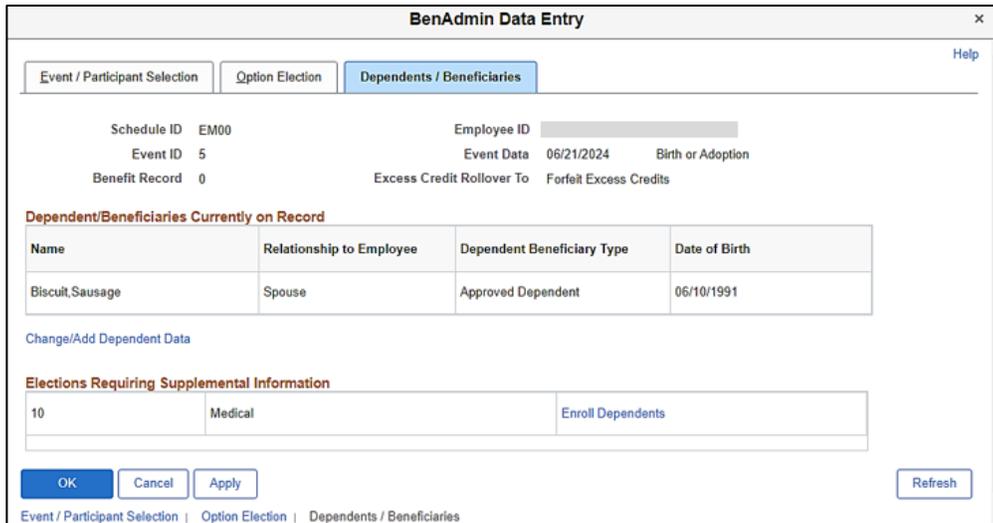


The screenshot shows the 'BenAdmin Data Entry' window with the 'Dependents / Beneficiaries' tab selected. The 'Dependents / Beneficiaries' tab is highlighted with a red box in the screenshot.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Dependent / Beneficiaries** tab displays.



BenAdmin Data Entry

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

Schedule ID EM00 Employee ID [REDACTED]
 Event ID 5 Event Data 06/21/2024 Birth or Adoption
 Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Biscuit,Sausage	Spouse	Approved Dependent	06/10/1991

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-------------------

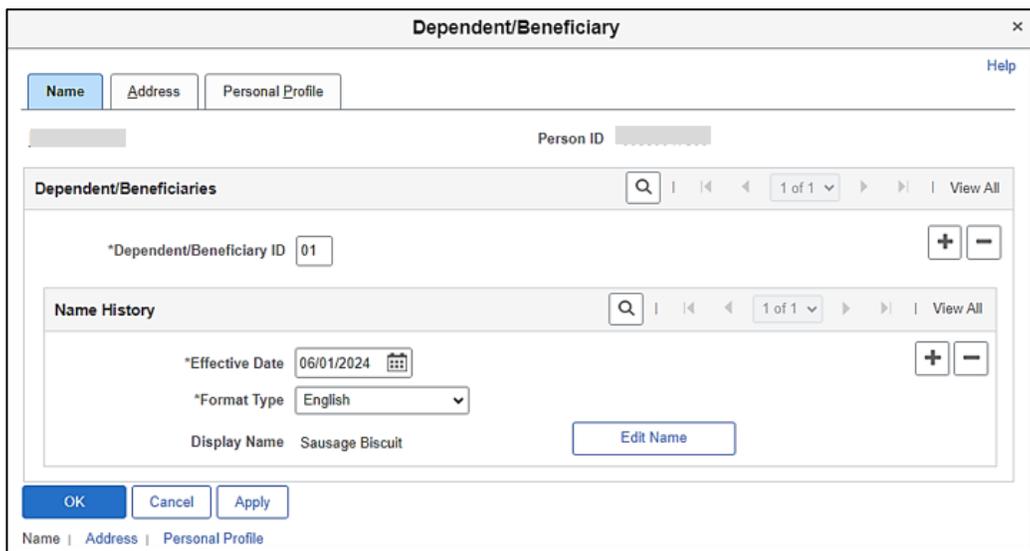
OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

64. Click the **Change/Add Dependent Data** link.

Change/Add Dependent Data

The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.



Dependent/Beneficiary

Name | Address | Personal Profile | Help

Person ID [REDACTED]

Dependent/Beneficiaries [Search] | 1 of 1 | View All

*Dependent/Beneficiary ID 01 [Add] [Remove]

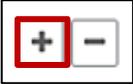
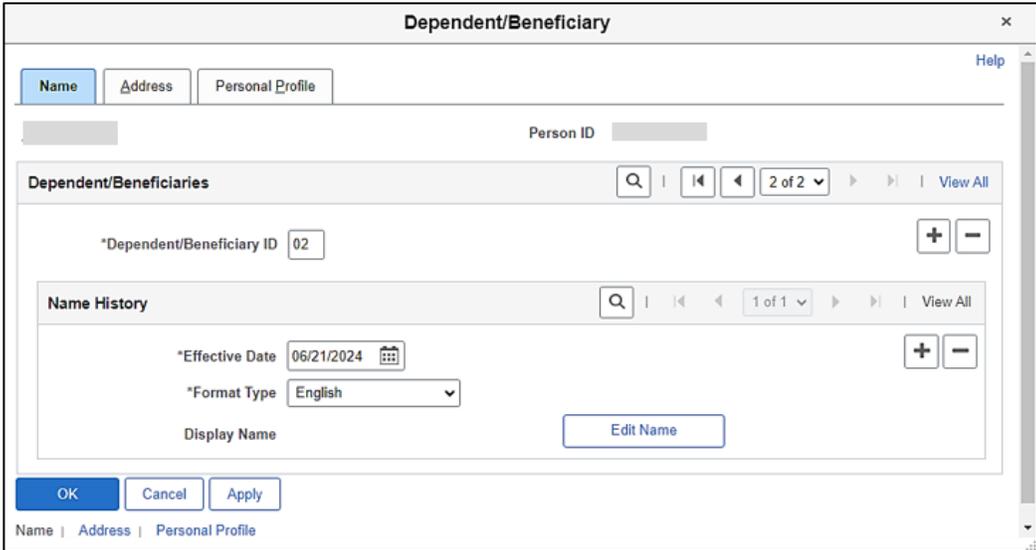
Name History [Search] | 1 of 1 | View All

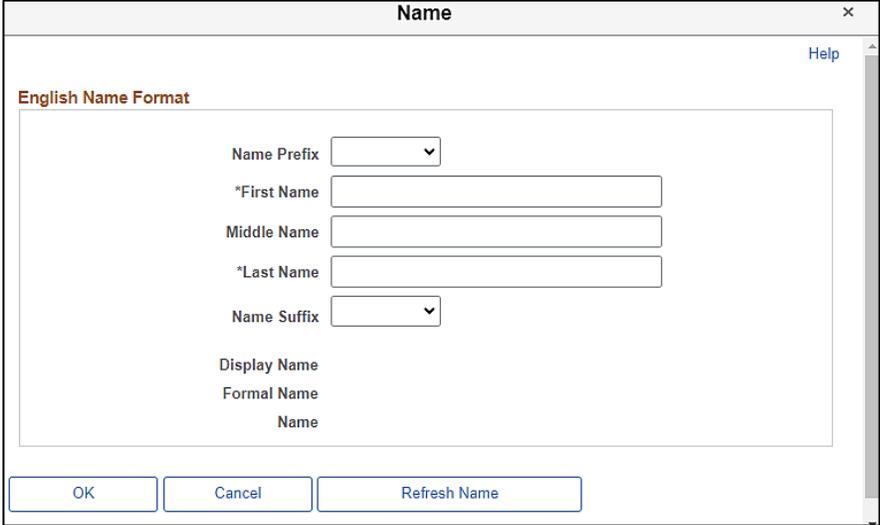
*Effective Date 06/01/2024 [Calendar] [Add] [Remove]
 *Format Type English [Dropdown]
 Display Name Sausage Biscuit [Edit Name]

OK Cancel Apply

Name | Address | Personal Profile

BN361_Creating and Completing a Life Event on behalf of an Employee

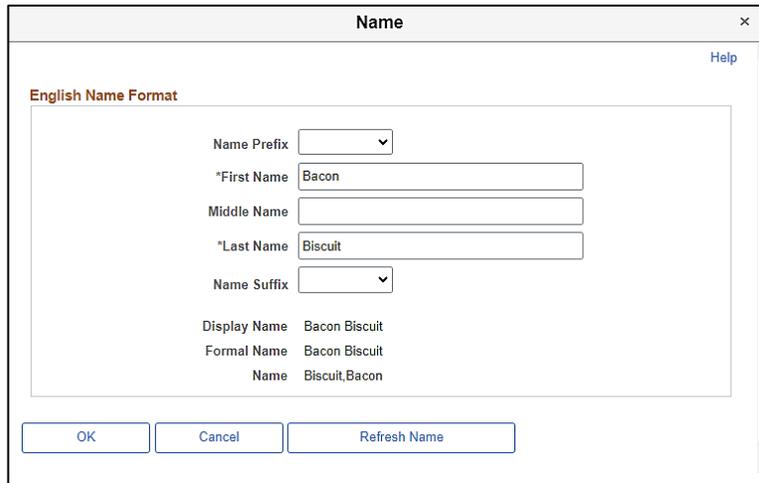
Step	Action
65.	<p>First, add a new Dependent/Beneficiary ID. Click the Add a new row icon (+) within the Dependent/Beneficiaries section.</p> 
<p>The page refreshes and the new row displays (Dependent/Beneficiary ID "02" in this scenario).</p> 	
	<p>For Life Events, the Effective Date field defaults to the date that the coverage will begin (in this scenario, a newborn dependent is being added based on a Birth event. Therefore, the Effective Date field defaults to the newborn's date of birth ("6/21/2024" in this scenario)). Do not change this date as it must match the Event Date, or the system will not recognize this dependent as eligible for coverage. The Dependent/Beneficiary ID field will default to the next available Dependent/Beneficiary ID number ("02" in this scenario) and increment by 1 for each additional dependent subsequently added.</p>
66.	<p>Click the Edit Name button.</p> 

Step	Action
	<p>The Name page displays in a pop-up window.</p> 
67.	<p>At a minimum, enter the dependent's first and last name in the corresponding fields. The Name Prefix, Middle Name, and Name Suffix fields are optional but should be entered as applicable.</p> 
68.	<p>Click the Refresh Name button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Name** page refreshes.



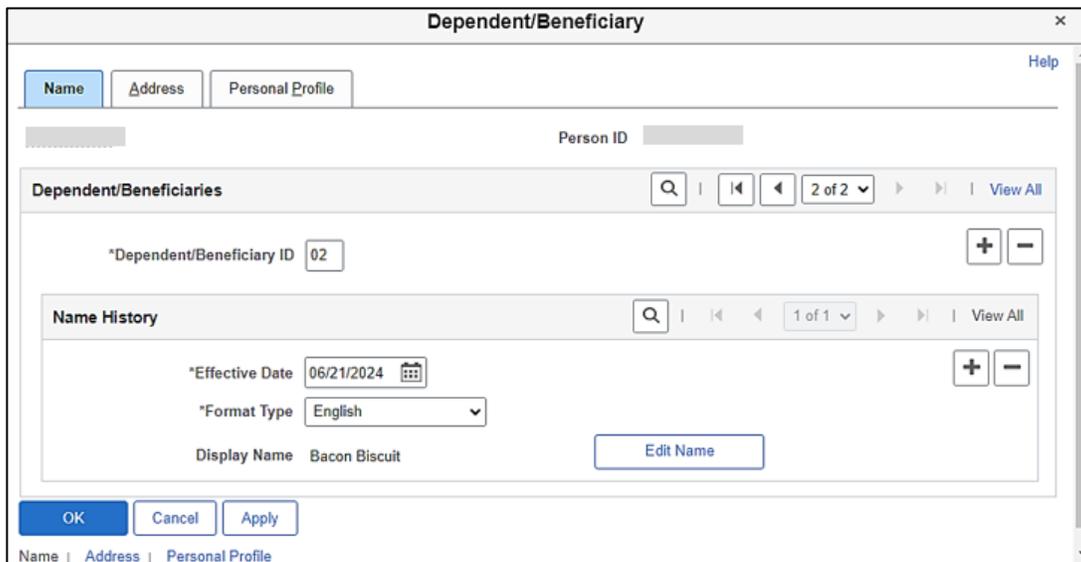

The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.

69.

Click the **OK** button.



The **Name** tab redisplay.

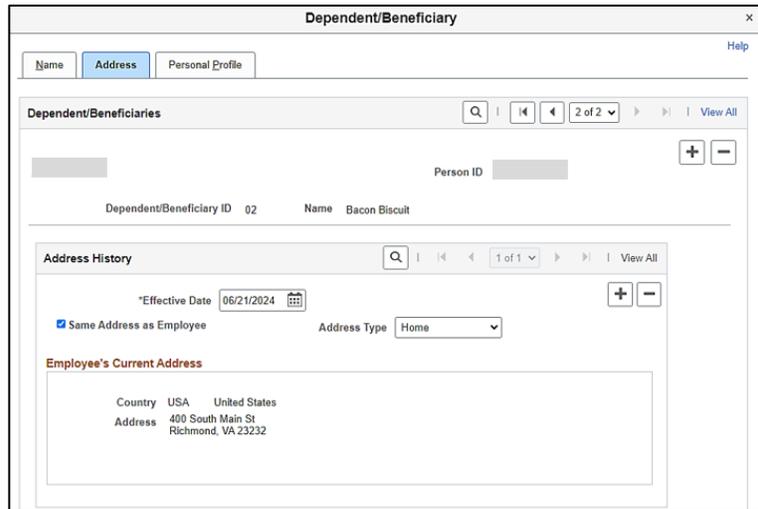


Step	Action
	The Display Name field auto-populates with the name information previously entered.
70.	Click the Address tab. <div data-bbox="285 537 721 611" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <div style="display: flex; justify-content: space-around; border-bottom: 1px solid black;"> Name Address Personal Profile </div> </div>
	The Address tab displays. <div data-bbox="342 695 1294 1318" style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> Dependent/Beneficiary Help </div> <div style="display: flex; justify-content: space-around; border-bottom: 1px solid gray;"> Name Address Personal Profile </div> </div> <div style="padding: 5px 0;"> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid gray;"> Dependent/Beneficiaries Q 2 of 2 View All </div> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid gray;"> <div style="border: 1px solid gray; width: 100px; height: 15px;"></div> Person ID <div style="border: 1px solid gray; width: 100px; height: 15px;"></div> + - </div> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid gray;"> Dependent/Beneficiary ID 02 Name Bacon Biscuit </div> </div> <div style="padding: 5px 0;"> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid gray;"> Address History Q 1 of 1 View All </div> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid gray;"> *Effective Date 06/21/2024 + - </div> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid gray;"> <input type="checkbox"/> Same Address as Employee Address Type ▼ </div> <div style="padding: 5px 0;"> <div style="border: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center; border-bottom: 1px solid gray;"> Country USA United States </div> <div style="display: flex; justify-content: space-between; align-items: center;"> Address Edit Address </div> </div> </div> </div> </div>
71.	Complete the address information as applicable for the dependent by clicking the Same Address as Employee checkbox option (applicable for this scenario). <div data-bbox="293 1451 621 1514" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <input style="border: 2px solid red;" type="checkbox"/> Same Address as Employee </div>
	User can also complete the address information as applicable for the dependent by selecting the applicable Address Type using the dropdown button provided and then clicking the Edit Address button (the Edit Address page will display in a pop-up window and the applicable address information can be entered).

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Address** tab refreshes.



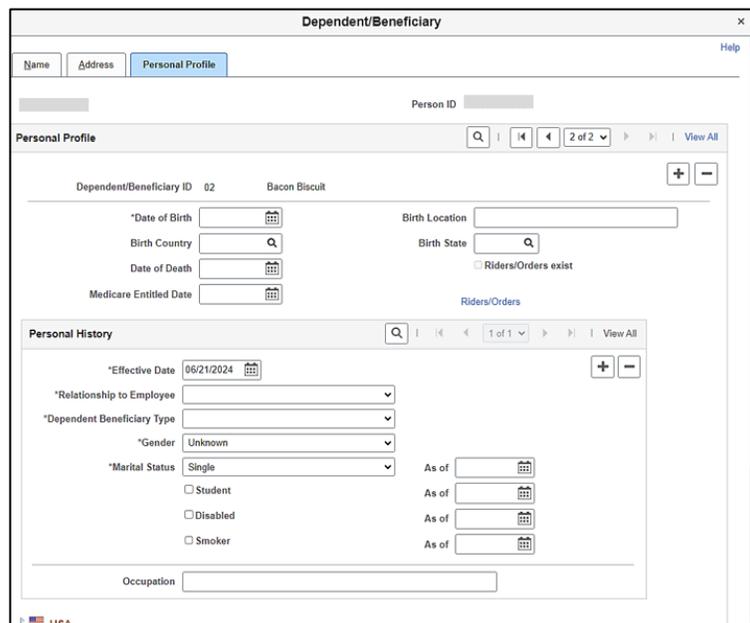

The address information auto-populates in the **Employee's Current Address** section.

72.

Click the **Personal Profile** tab.



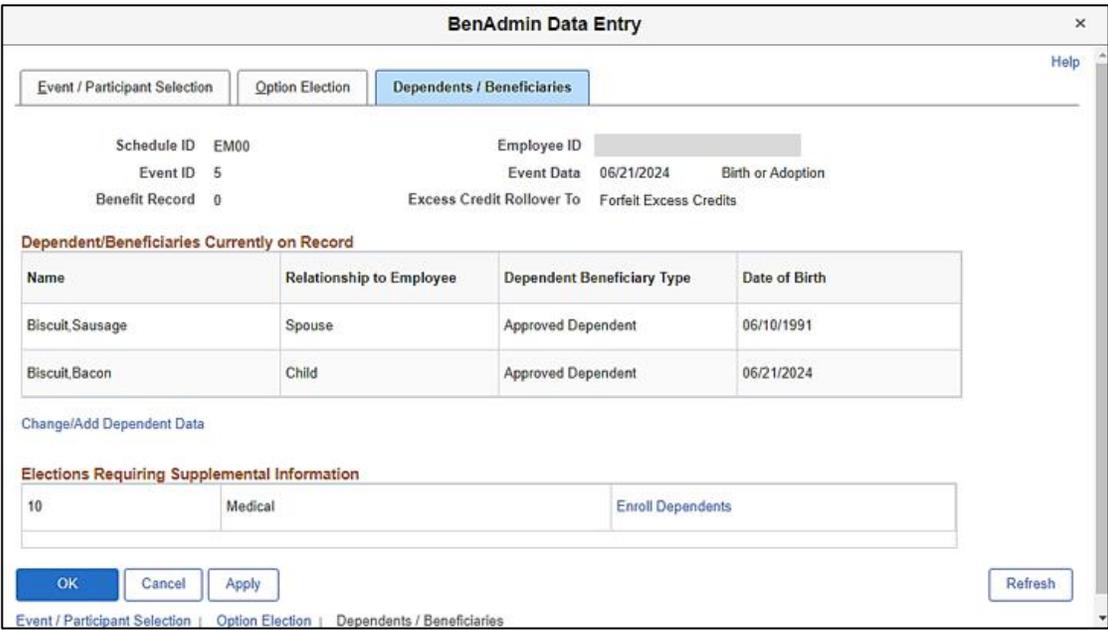
The **Personal Profile** tab displays.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The Student and Smoker checkbox options are not required in Cardinal and this information is not transmitted to the Plan Provider (Vendor).</p>
73.	<p>Click the Date of Birth Calendar icon and select the dependent’s date of birth.</p> 
74.	<p>Click the Relationship to Employee dropdown button and select the dependent’s relationship to the employee (“Child” in this example).</p> 
75.	<p>Click the Dependent Beneficiary Type dropdown button and select “Approved Dependent”.</p> 
	<p>“Approved Dependent” is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.</p>
76.	<p>Click the Gender dropdown button and select the dependent’s gender (“Unknown”, “Male”, or “Female”) (“Male” in this example).</p> 
77.	<p>The Marital Status field defaults to “Single”. Do not update for this newborn dependent.</p> 
78.	<p>Click the vertical scrollbar to scroll down on the page to the National ID section.</p>
79.	<p>Enter the dependent’s Social Security Number (SSN) in the National ID field.</p> 

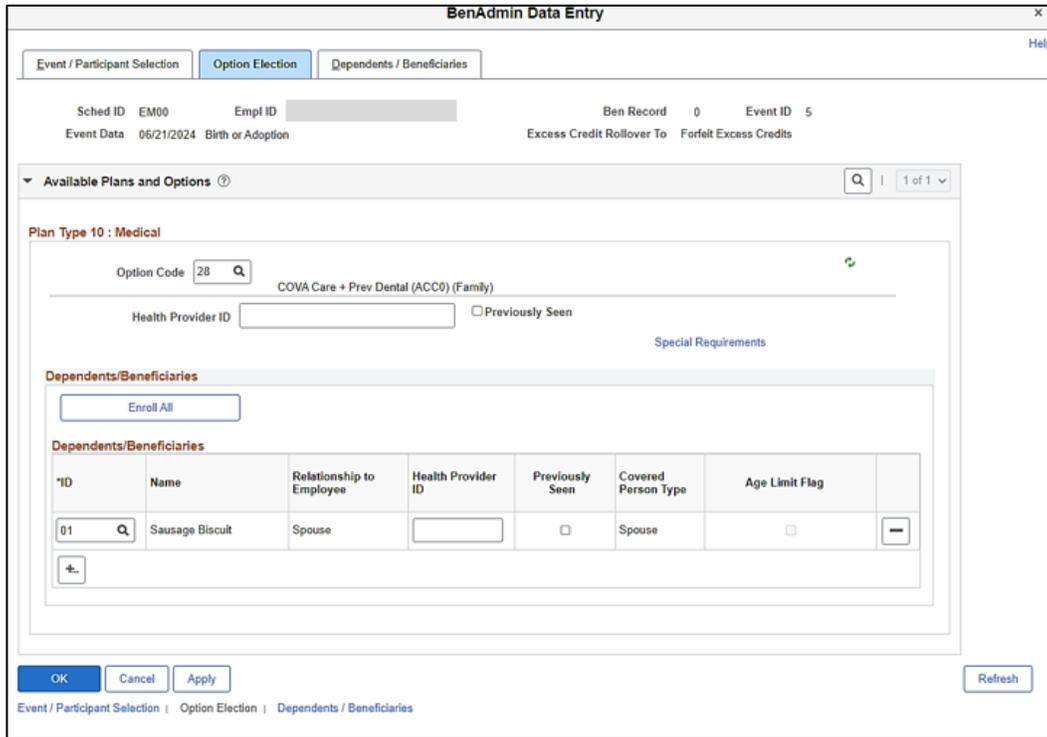
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action															
	<p>If the employee did not provide the dependent’s SSN, or in the case of a newborn, the SSN has not been obtained yet, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.</p>															
80.	<p>Click the OK button.</p> 															
<p>The Dependents / Beneficiaries tab redisplay.</p>  <p>BenAdmin Data Entry</p> <p>Event / Participant Selection Option Election Dependents / Beneficiaries Help</p> <p>Schedule ID EM00 Employee ID [Redacted] Event ID 5 Event Data 06/21/2024 Birth or Adoption Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits</p> <p>Dependent/Beneficiaries Currently on Record</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship to Employee</th> <th>Dependent Beneficiary Type</th> <th>Date of Birth</th> </tr> </thead> <tbody> <tr> <td>Biscuit,Sausage</td> <td>Spouse</td> <td>Approved Dependent</td> <td>06/10/1991</td> </tr> <tr> <td>Biscuit,Bacon</td> <td>Child</td> <td>Approved Dependent</td> <td>06/21/2024</td> </tr> </tbody> </table> <p>Change/Add Dependent Data</p> <p>Elections Requiring Supplemental Information</p> <table border="1"> <tr> <td>10</td> <td>Medical</td> <td>Enroll Dependents</td> </tr> </table> <p>OK Cancel Apply Refresh</p> <p>Event / Participant Selection Option Election Dependents / Beneficiaries</p>		Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Biscuit,Sausage	Spouse	Approved Dependent	06/10/1991	Biscuit,Bacon	Child	Approved Dependent	06/21/2024	10	Medical	Enroll Dependents
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth													
Biscuit,Sausage	Spouse	Approved Dependent	06/10/1991													
Biscuit,Bacon	Child	Approved Dependent	06/21/2024													
10	Medical	Enroll Dependents														
	<p>The dependent just added displays in the Dependent/Beneficiaries Currently on Record section.</p>															
81.	<p>Click the Option Election tab.</p> 															

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Option Election** tab redisplay.



82. Next, enroll the dependent(s) in the previously selected Medical Plan by Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this scenario).



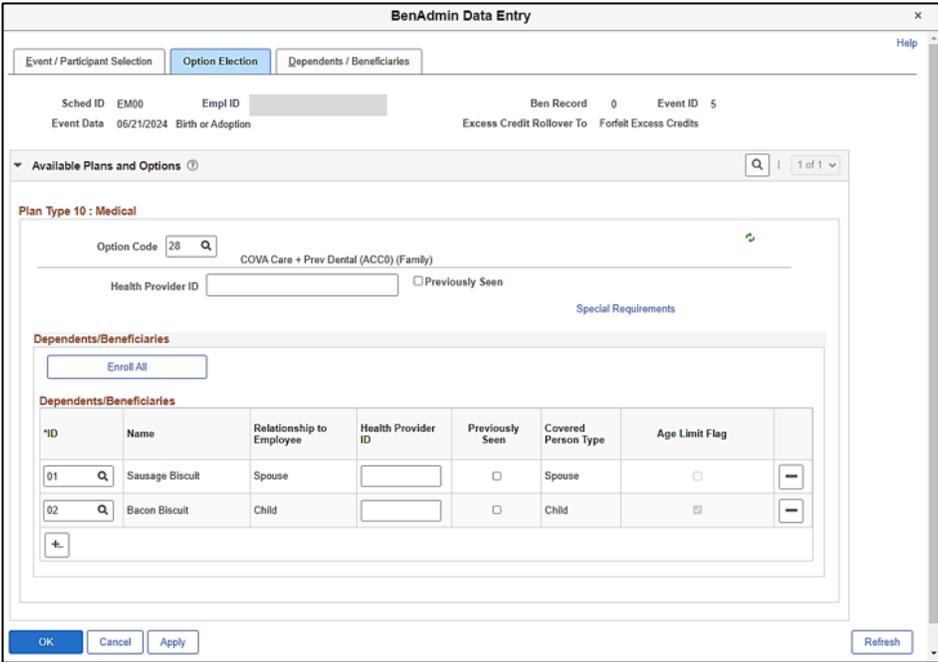
Users can also enroll the dependent(s) in the previously selected Medical Plan by adding the applicable dependents individually using the **ID Look Up** icon within the **Dependents/Beneficiaries** section. Additional rows can be added in this section by clicking the **Add Multiple Rows** icon (+...).

A message displays in a pop-up window.

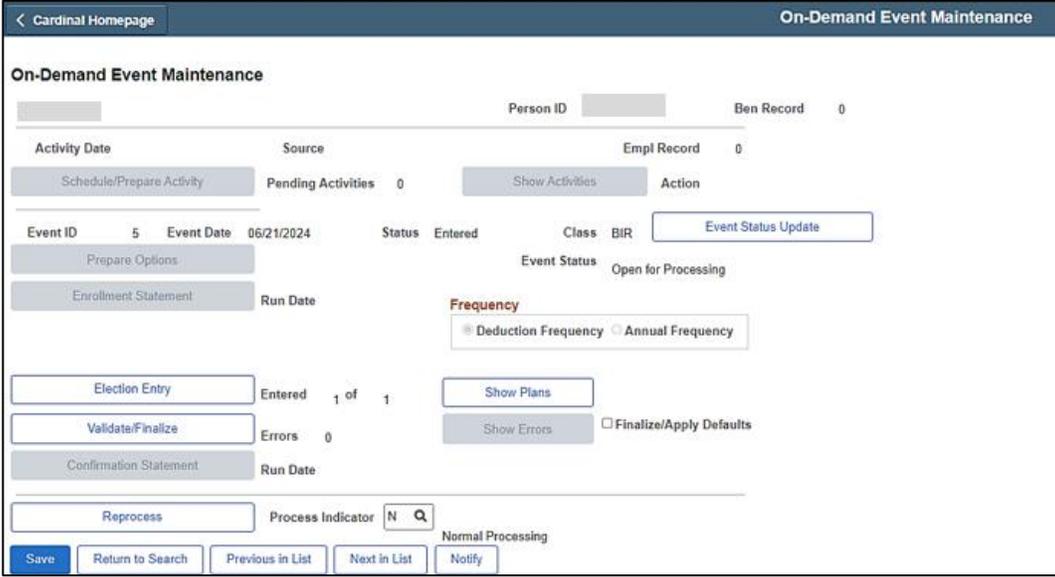
All existing enrollments for this Plan will be deleted to make room for the new entries. (4000,60)

You have selected to mass enroll all eligible Dependents or Beneficiaries. To make room for these automatic enrollments, all existing individual enrollments will first be removed, along with any current election information.

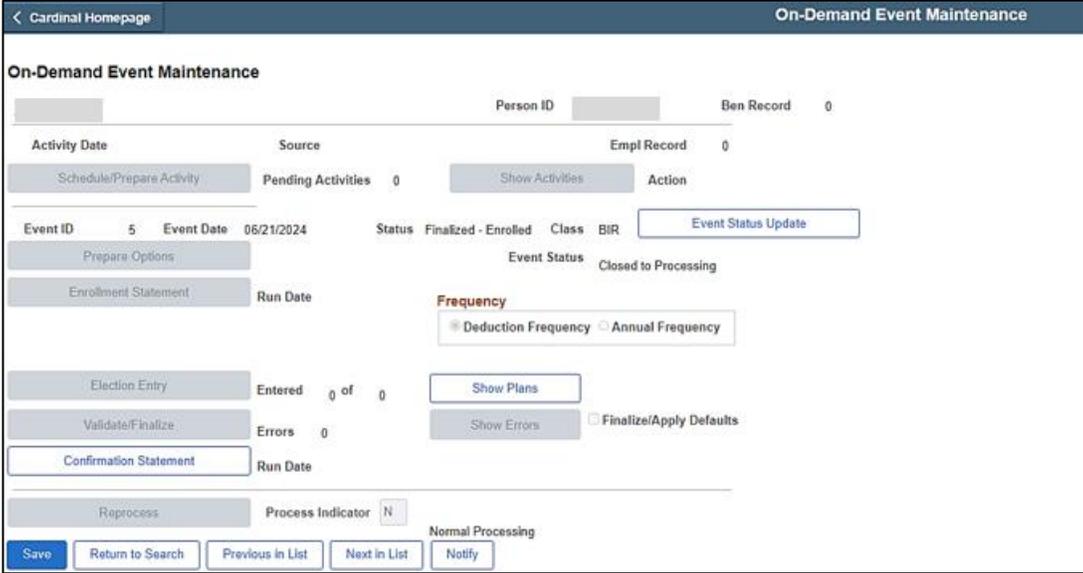
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action																					
	This is not an error message. It is just a message confirming that all dependents will be removed and then all eligible dependents will be enrolled.																					
83.	Click the OK button. 																					
<p>The Option Election tab redispays.</p>  <p>The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. It displays fields for 'Sched ID', 'EM00', 'Emp ID', 'Ben Record', and 'Event ID'. Below these are 'Available Plans and Options' with 'Plan Type 10 : Medical' selected. The 'Option Code' is '28' and the plan is 'COVA Care + Prev Dental (ACC0) (Family)'. There is a section for 'Dependents/Beneficiaries' with an 'Enroll All' button and a table listing dependents:</p> <table border="1" data-bbox="381 1094 1177 1220"> <thead> <tr> <th>*ID</th> <th>Name</th> <th>Relationship to Employee</th> <th>Health Provider ID</th> <th>Previously Seen</th> <th>Covered Person Type</th> <th>Age Limit Flag</th> </tr> </thead> <tbody> <tr> <td>01</td> <td>Sausage Biscuit</td> <td>Spouse</td> <td></td> <td><input type="checkbox"/></td> <td>Spouse</td> <td><input type="checkbox"/></td> </tr> <tr> <td>02</td> <td>Bacon Biscuit</td> <td>Child</td> <td></td> <td><input type="checkbox"/></td> <td>Child</td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table>		*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	01	Sausage Biscuit	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>	02	Bacon Biscuit	Child		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag																
01	Sausage Biscuit	Spouse		<input type="checkbox"/>	Spouse	<input type="checkbox"/>																
02	Bacon Biscuit	Child		<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>																
	The dependents enrolled display in the Dependents/Beneficiaries section. Validate for accuracy and ensure that all applicable dependents are listed.																					
84.	Click the OK button. 																					

BN361_Creating and Completing a Life Event on behalf of an Employee

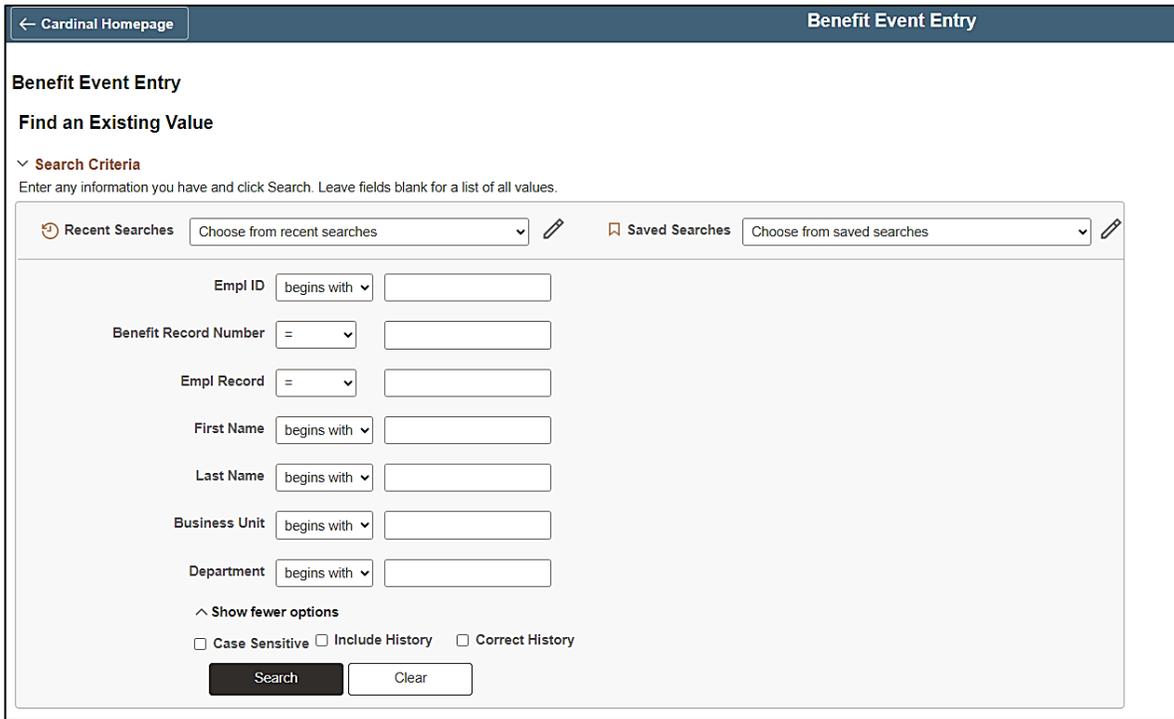
Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.</p>
<p>85.</p>	<p>Click the Validate/Finalize button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.</p> 
	<p>A Confirmation message displays in a pop-up window once the process completes.</p> 
<p>86.</p>	<p>Click the OK button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.</p>
87.	<p>Click the Save button.</p> 
	<p>This Benefit Event to add the newborn dependent is now complete. Refer to the Viewing the Employee’s Benefit Information section of this Job Aid for instructions on how to validate accuracy. Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee. This information will be transmitted to the Health Vendor in the evening interface file. If no other elections are being made by the employee, this process is complete. However, if any Flex Spending elections are being made (as in this scenario), continue with Step 88.</p> <p>Next, the Benefit Event must be created in order to enroll the employee in the Flex Spending Dependent Care plan.</p>
88.	<p>Navigate to the Benefit Event page using the following path:</p> <p>NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event</p>

Step	Action
------	--------

The **Benefit Event Entry Find an Existing Value** page displays.

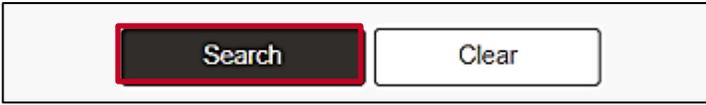


 For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in **Job Aids** under **Learning**.

89. Enter the employee’s Employee ID in the **Empl ID** field.
 The other search by options available (**Search by** dropdown button) are Business Unit, Department, and Name.



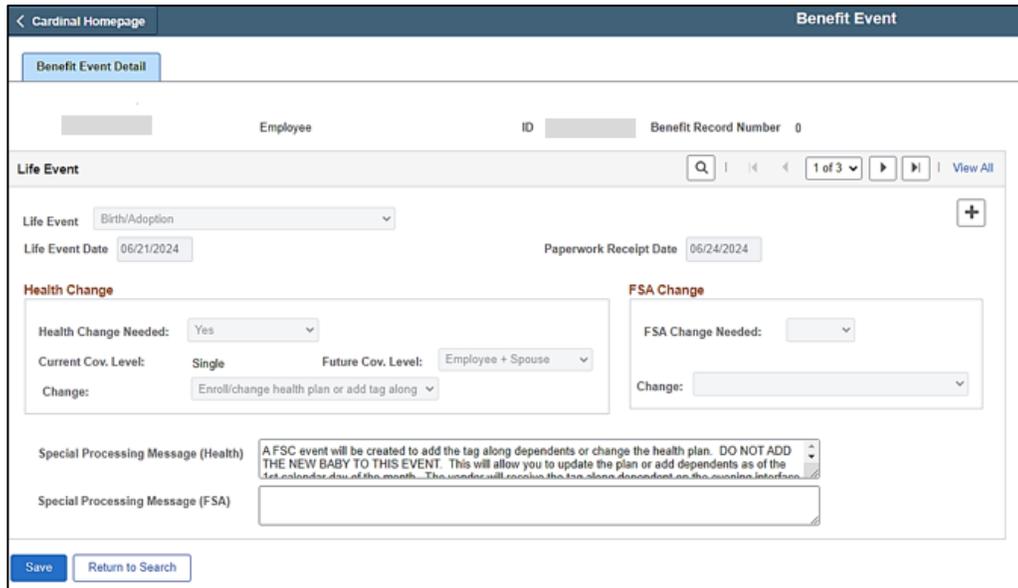
90. Click the **Search** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Benefit Event** page displays for the applicable employee.



The screenshot shows the 'Benefit Event' page for an employee. At the top, there's a navigation bar with 'Cardinal Homepage' and 'Benefit Event'. Below that is a 'Benefit Event Detail' section. The employee's name, ID, and Benefit Record Number (0) are displayed. A 'Life Event' table shows one entry: 'Birth/Adoption' on '06/21/2024' with a 'Paperwork Receipt Date' of '06/24/2024'. Below the table are sections for 'Health Change' and 'FSA Change'. The 'Health Change' section has 'Health Change Needed' set to 'Yes', 'Current Cov. Level' as 'Single', and 'Future Cov. Level' as 'Employee + Spouse'. The 'FSA Change' section has 'FSA Change Needed' set to a dropdown. A 'Special Processing Message (Health)' is displayed: 'A FSC event will be created to add the tag along dependents or change the health plan. DO NOT ADD THE NEW BABY TO THIS EVENT. This will allow you to update the plan or add dependents as of the 1st calendar day of the month. The user will receive the tag along dependent on the online interface.' There are 'Save' and 'Return to Search' buttons at the bottom.



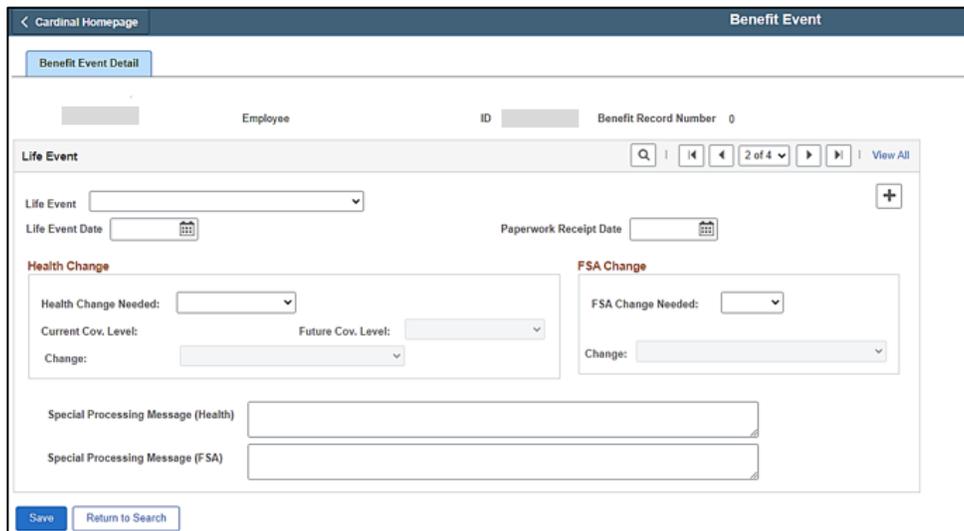
The **Benefit Event Entry** page displays with the information from any previously created Benefit Events for the employee.

91.

Click the **Add a new row** icon (+).

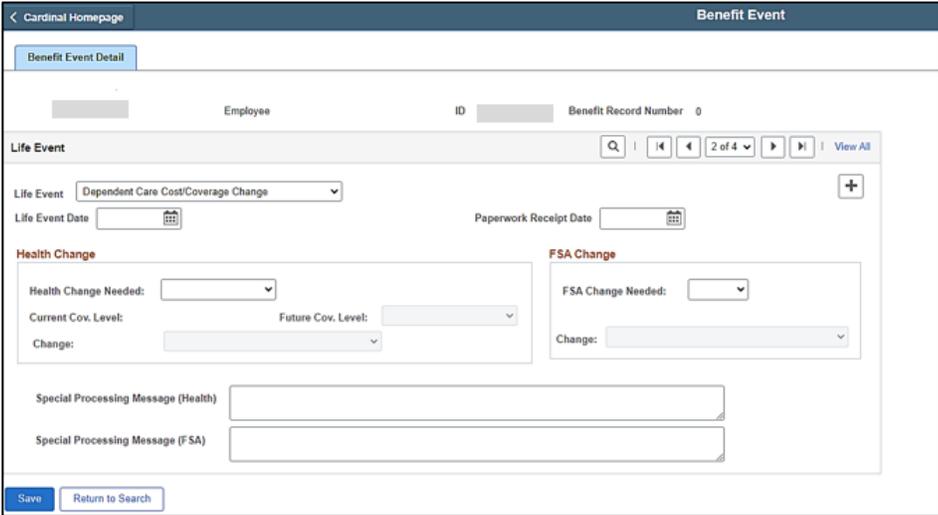


The page refreshes and the new row displays.

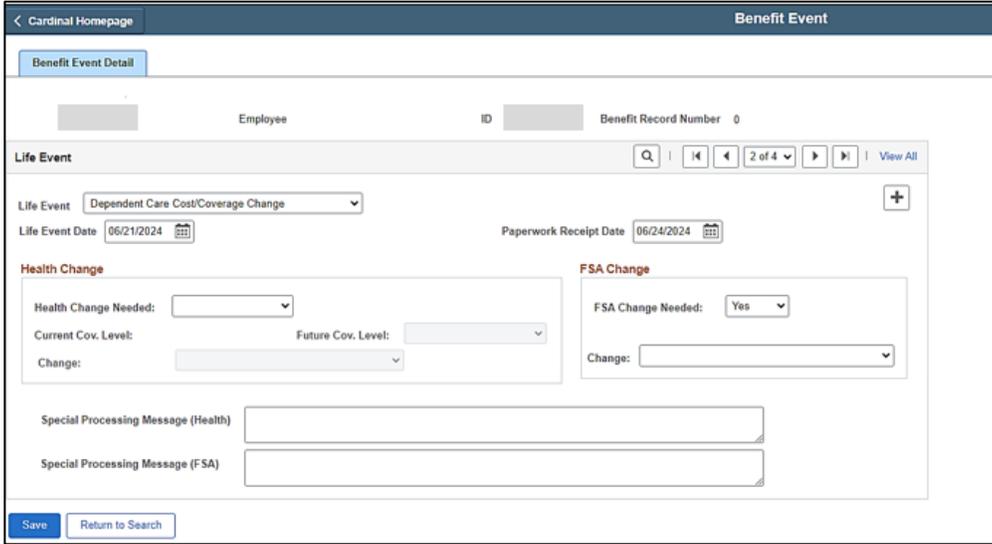


This screenshot shows the 'Benefit Event' page after a refresh. The 'Life Event' table now displays two rows. The first row is the same as in the previous screenshot. The second row is a new, empty entry with a plus sign icon in the 'Life Event' column. The 'Health Change' and 'FSA Change' sections are now empty. The 'Special Processing Message' fields are also empty. The 'Save' and 'Return to Search' buttons remain at the bottom.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
92.	Click the Life Event dropdown button and select the applicable type of Life Event (Dependent Care Cost/Coverage Change in this scenario). 
The Benefit Event page redisplay with the selected Life Event. 	
93.	Click the Life Event Date Calendar icon and select the applicable date (“6/21/2024” in this scenario). 
	This is the date of birth for the newborn dependent as this is the Life Event which occurred that made the employee eligible for this enrollment change.
94.	Click the Paperwork Receipt Date Calendar icon and select the applicable date (“6/24/2024” in this scenario). 
	This is the date that the Benefits Enrollment form was received from the employee.
95.	Click the FSA Change Needed dropdown button and select “Yes”. 

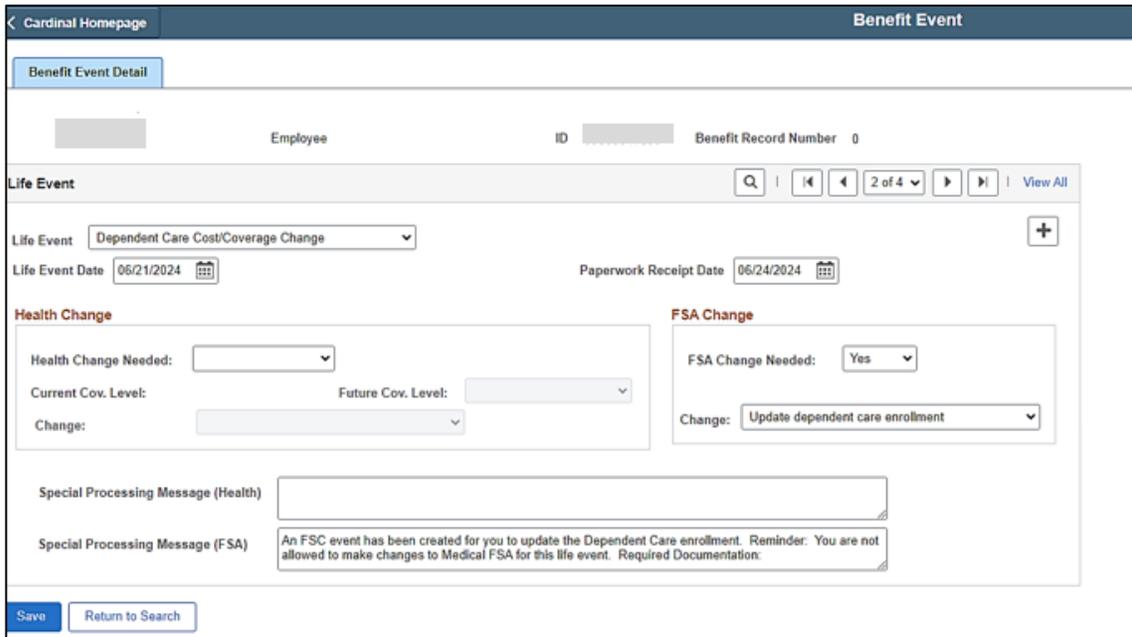
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The page refreshes.</p> 
96.	<p>Click the Change dropdown button and select “Update dependent care enrollment”.</p> 
97.	<p>Click the Save button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The page refreshes after the save action completes.




After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the **Special Processing Message (Health)** field and/or the **Special Processing Message (FSA)** field.

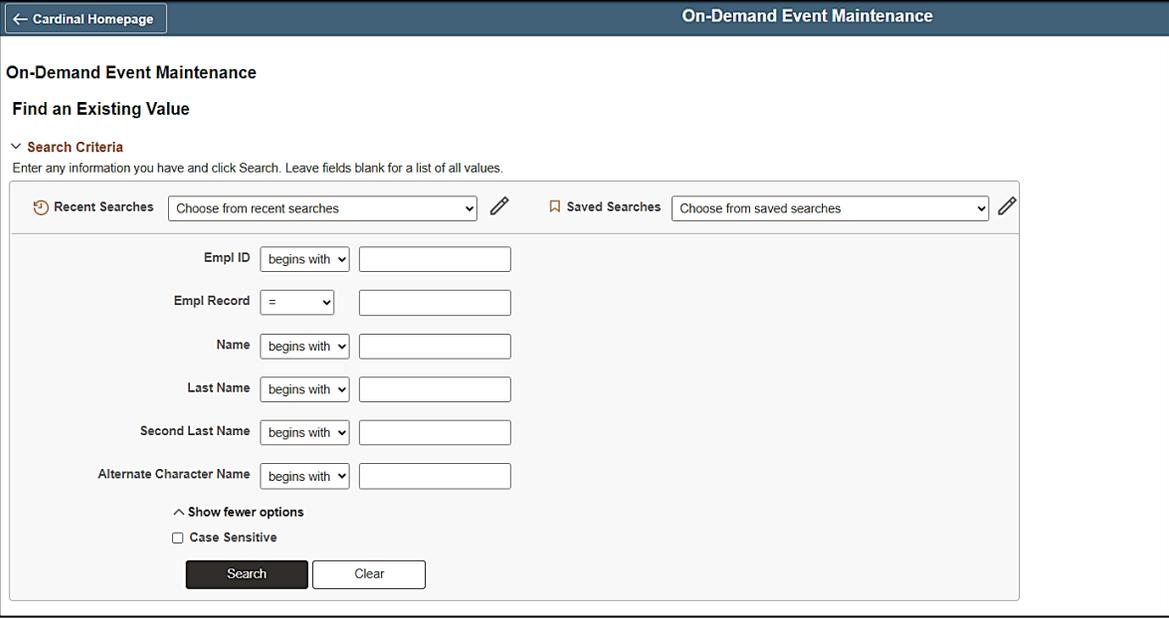
In this scenario, an FSC Benefit Event has been created for the purpose of enrolling the employee in the Flex Spending Dependent Care plan. This Benefit Event has a coverage begin date of the first day of the following month (“7/1/2024” in this scenario).

This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.

98.

Navigate to the **On-Demand Event Maintenance** page using the following path:

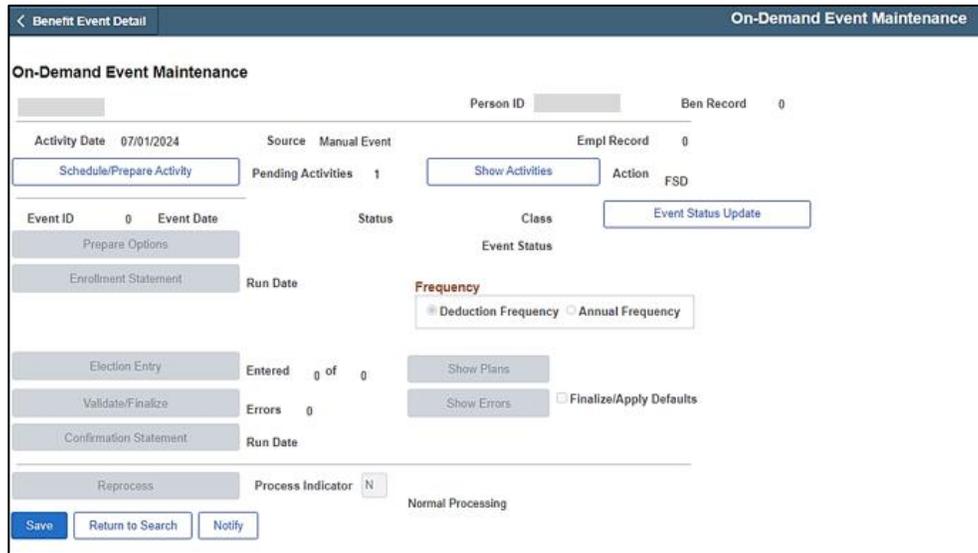
NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

Step	Action
	<p>The On-Demand Event Maintenance Find an Existing Value page displays.</p> 
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled “Overview of the Cardinal HCM Search Pages”. This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
<p>99.</p>	<p>Enter the employee’s Employee ID in the Empl ID field.</p> 
	<p>Searches can also be performed using the employee’s name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p>
<p>100.</p>	<p>Click the Search button.</p> 

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

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




Review the **Activity Date** field. For Life Events, this date will be auto-populated based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to enroll the employee in the Flex Spending Dependent Care plan based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the first day of the following month (“7/1/2024” in this scenario). Ensure that this date is accurate.

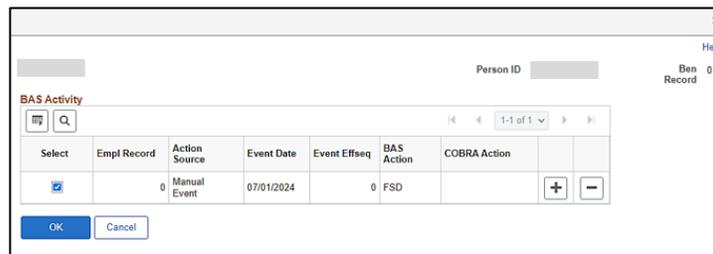
The **Source** field will be “Manual Event”. The **Action** field will default based on the type of Life Event (“FSD” in this scenario).

101.

Click the **Show Activities** button.

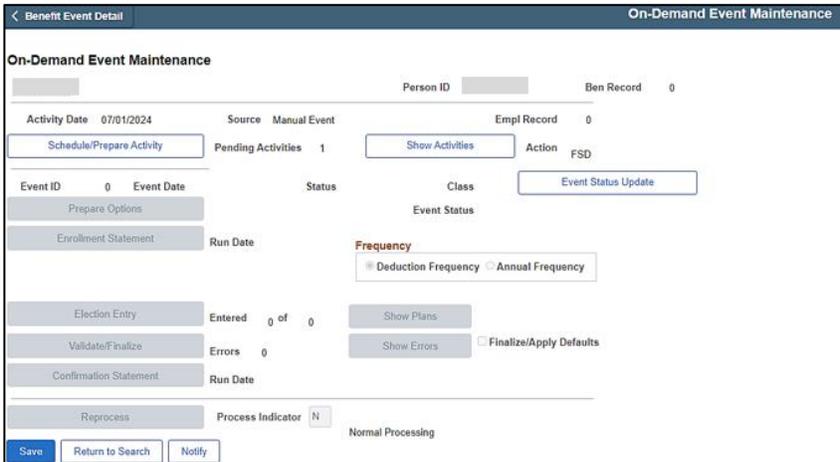


The **BAS Activity** page displays in a pop-up window.



Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
<input checked="" type="checkbox"/>	0	Manual Event	07/01/2024	0	FSD	

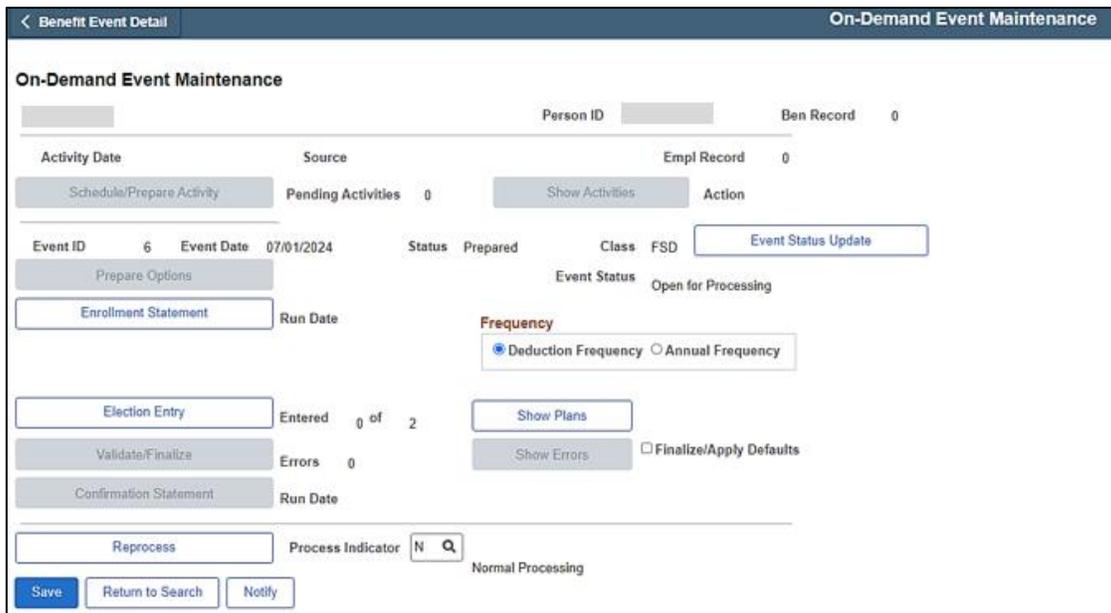
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
102.	<p>Ensure that the Select checkbox option for the Benefit Event is selected and then click the OK button.</p> 
<p>The On-Demand Event Maintenance page redisplay.</p> 	
	<p>If the Benefits Administration process has already run since the time the manual event was created, the Pending Activities field will display a “0”. In this case, proceed to Step 105.</p>
103.	<p>If the Pending Activities field displays a “1”, click the Schedule/Prepare Activity button.</p> 
	<p>Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. This button will be disabled if the Benefits Administration process has already run.</p>
<p>A Confirmation message displays in a pop-up window once the automated program completes.</p> 	

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
104.	Click the OK button. 

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




Confirm that the **Status** field displays as “Prepared” and the **Event Status** field displays as “Open for Processing”.



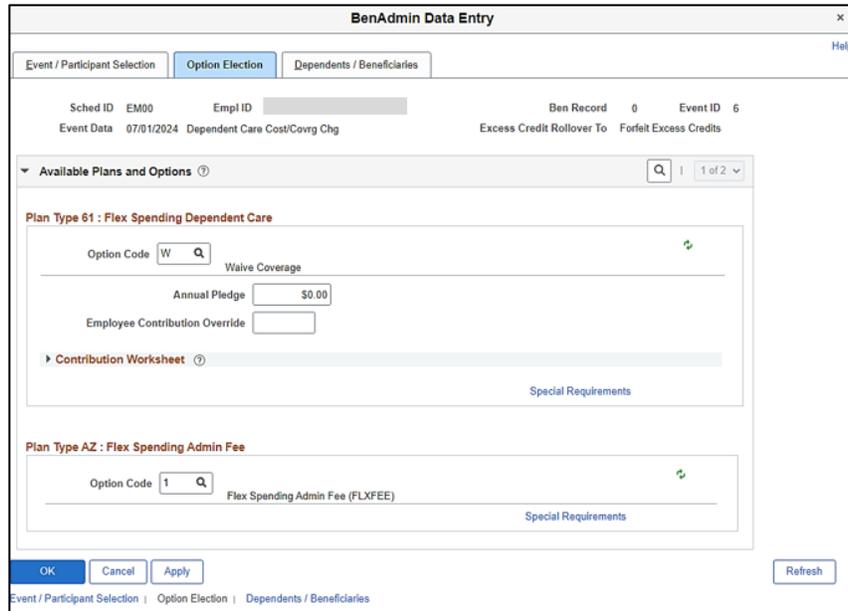
If these statuses do not display as indicated, please submit a VCCC Ticket with Cardinal BN in the Subject line.

105.	Click the Election Entry button. 
------	--

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. It displays fields for Sched ID (EM00), Empl ID, Ben Record (0), and Event ID (6). The event data is dated 07/01/2024 for 'Dependent Care Cost/Covrg Chg'. Under 'Available Plans and Options', two plan types are visible: 'Plan Type 61: Flex Spending Dependent Care' and 'Plan Type AZ: Flex Spending Admin Fee'. The Plan Type 61 section includes an 'Option Code' field with 'W' and a magnifying glass icon, a 'Waive Coverage' checkbox, an 'Annual Pledge' field with '\$0.00', and an 'Employee Contribution Override' field. A 'Contribution Worksheet' link is also present. The Plan Type AZ section includes an 'Option Code' field with '1' and a magnifying glass icon, and a 'Flex Spending Admin Fee (FLXFEE)' field. At the bottom, there are 'OK', 'Cancel', 'Apply', and 'Refresh' buttons.



Based on the manual event created, only the **Plan Type 61: Flex Spending Dependent Care** and **Plan Type AZ: Flex Spending Admin Fee** sections display.

106.

Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 61: Flex Spending Dependent Care** section and select the applicable coverage code (Option Code 1).

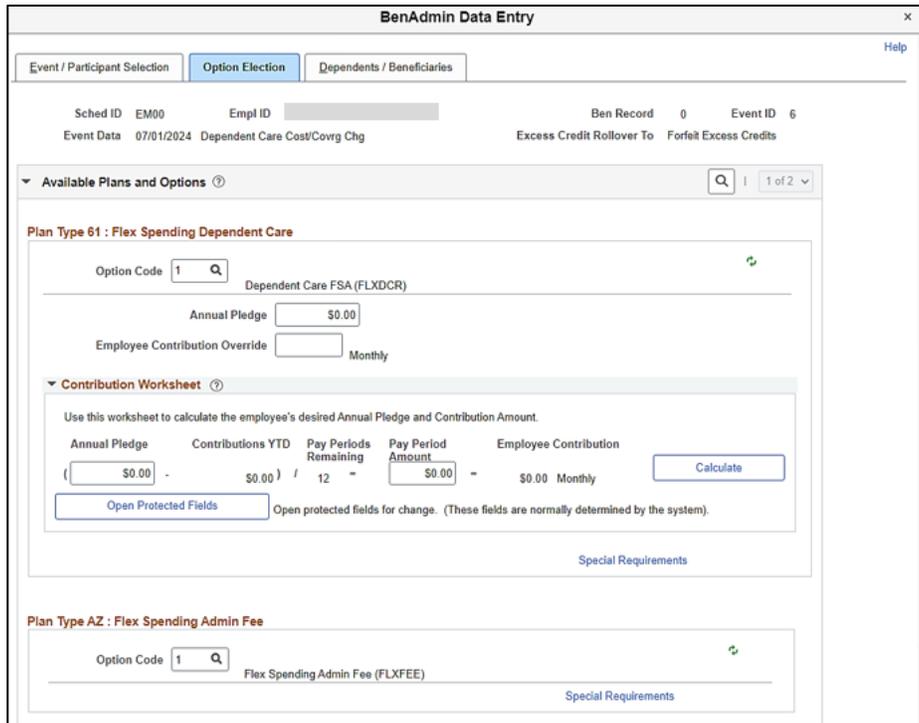


This close-up shows the 'Plan Type 61: Flex Spending Dependent Care' section. The 'Option Code' field contains the letter 'W' and has a magnifying glass icon to its right. A red rectangular box highlights the magnifying glass icon.

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The page refreshes based on the selection.



The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. It displays details for 'Plan Type 61 : Flex Spending Dependent Care' and 'Plan Type AZ : Flex Spending Admin Fee'. The 'Annual Pledge' field in the Plan Type 61 section is currently set to \$0.00. Below it is a 'Contribution Worksheet' section with a table for calculating the annual pledge based on pay periods and amounts.

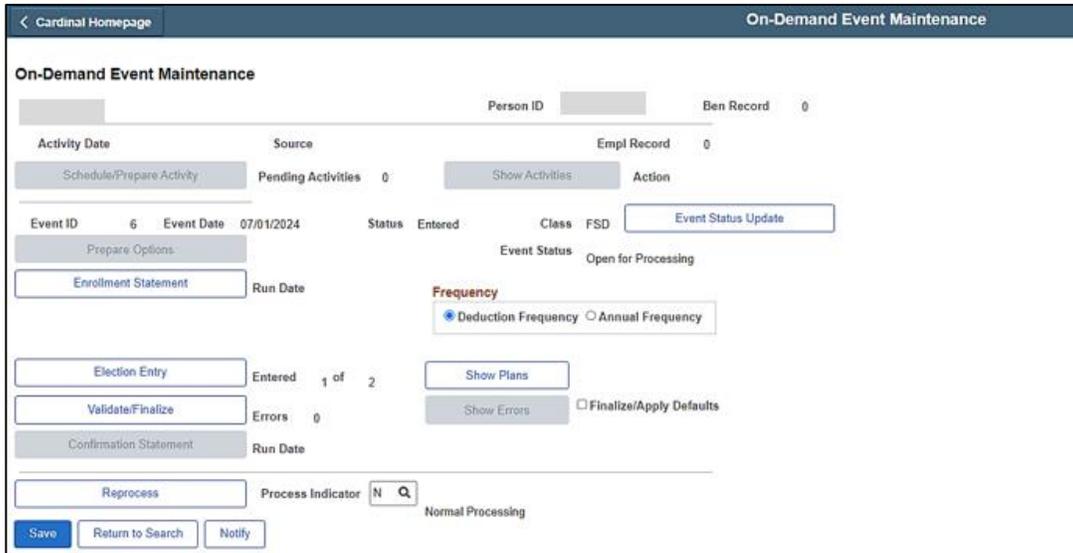
Annual Pledge	Contributions YTD	Pay Periods Remaining	Pay Period Amount	Employee Contribution
\$0.00	\$0.00	12	\$0.00	\$0.00 Monthly

107.	<p>Enter the applicable amount in the Annual Pledge field based on the employee’s Benefit Enrollment form (“1,000.00” in this scenario).</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <p>Annual Pledge <input style="border: 2px solid red;" type="text" value="\$0.00"/></p> </div>
	<p>The fields within the Contribution Worksheet section can also be used to calculate the annual pledge amount if the employee provided a per Pay Period amount.</p>
108.	<p>Complete the Plan Type AZ: Flex Spending Admin Fee section as needed.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> <p>Plan Type AZ : Flex Spending Admin Fee</p> <p>Option Code <input style="border: 2px solid red;" type="text" value="1"/> Flex Spending Admin Fee (FLXFEE)</p> </div>
	<p>If the employee is enrolled in one or more Flex Spending Accounts (Flex Spending Medical or Flex Spending Dependent Care plan), the employee must be enrolled in the Flex Spending Admin Fee (Option Code 1). In this scenario, the employee was already enrolled in the Flex Spending Medical plan and therefore, is already enrolled in the Flex Spending Admin Fee.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
109.	Once complete, click the OK button. 

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




Note: The **Status** field will now display as “Entered”. The **Event Status** field will still display as “Open for Processing”.

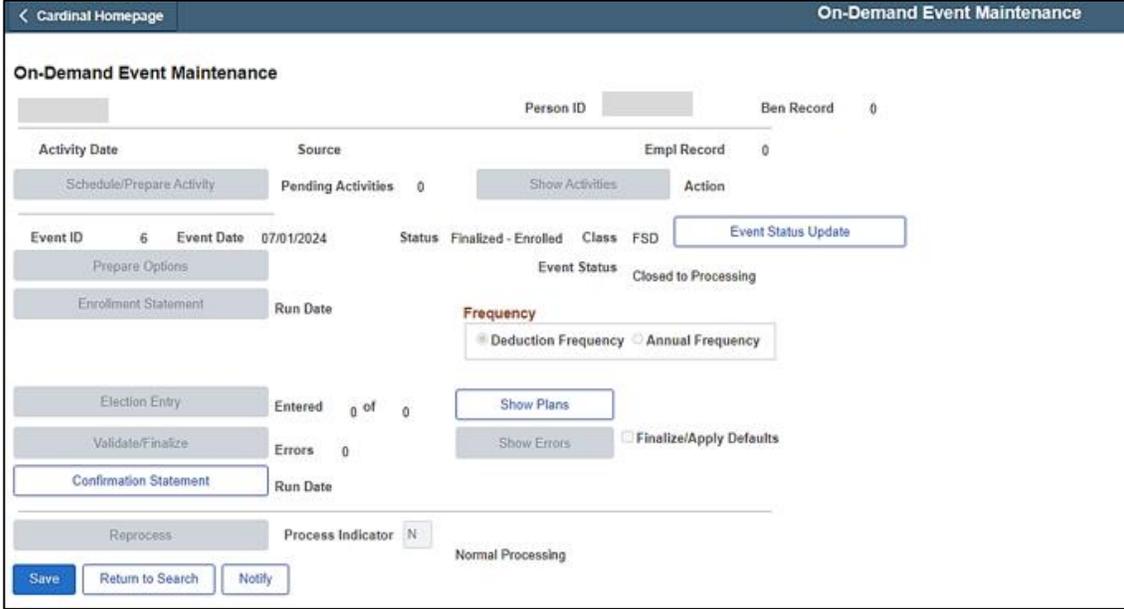
110.	Click the Validate/Finalize button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables. 
------	---

A **Confirmation** message displays in a pop-up window once the process completes.



111.	Click the OK button. 
------	--

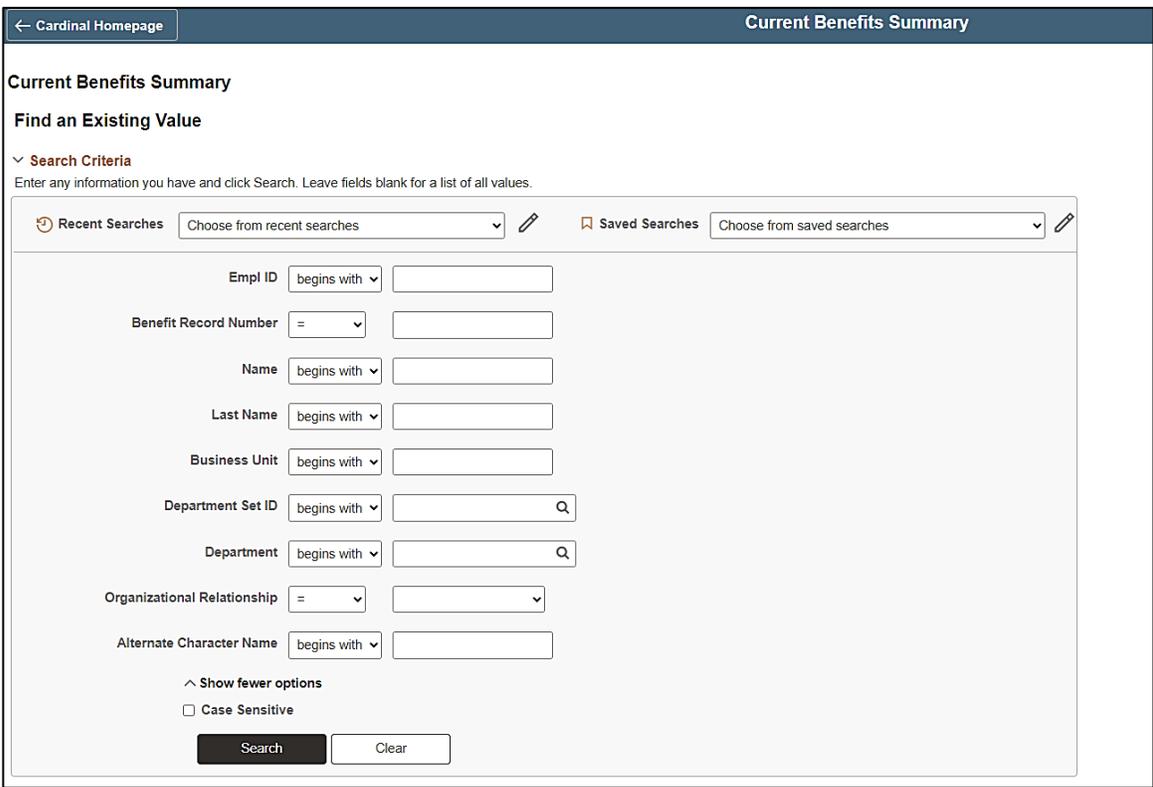
BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
	<p>The On-Demand Event Maintenance page redisplay.</p> 
	<p>The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.</p>
<p>112.</p>	<p>Click the Save button.</p> 
	<p>This Benefit Event to add the Flex Spending Dependent Care plan is now complete. Refer to the Viewing the Employee’s Benefit Information section of this Job Aid for instructions on how to validate accuracy. Refer to the Viewing/Printing a Confirmation Statement for instructions on how to print the Confirmation Statement for the employee.</p>

BN361_Creating and Completing a Life Event on behalf of an Employee

Viewing the Employee's Benefits Information

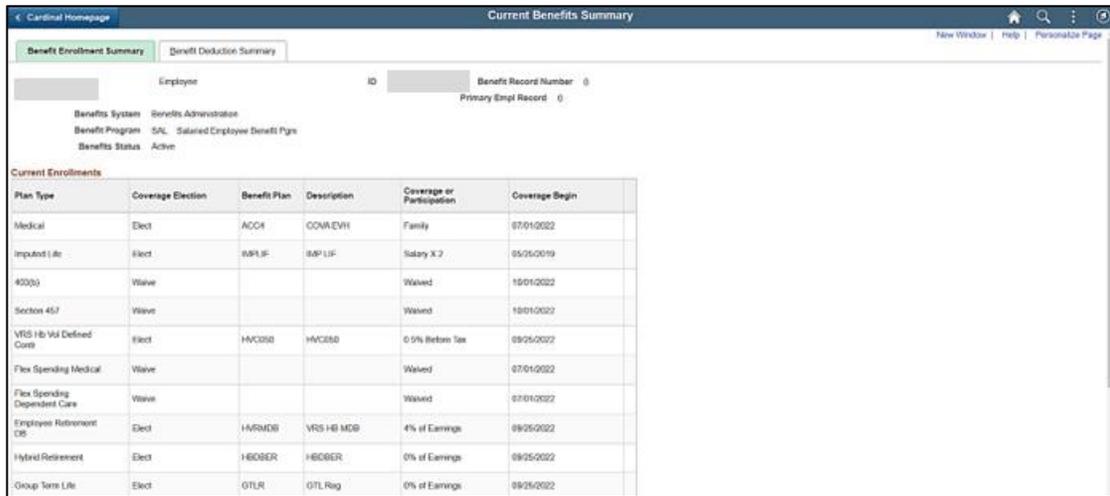
After completing a manual Benefit Event, the Benefits Administrator should view the employee's benefits information to ensure accuracy. This can be completed at any point after the Benefit Event has been finalized.

Step	Action
1.	<p>Navigate to the Current Benefits Summary page using the following path: NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary</p> <p>The Current Benefits Summary Find an Existing Value page displays.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;">  </div>
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled "Overview of the Cardinal HCM Search Pages". This Job Aid is located on the Cardinal Website in Job Aids under Learning.</p>
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;">  </div>

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
3.	Click the Search button. <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="border: 1px solid black; padding: 5px; display: inline-block; background-color: #f0f0f0;">Search</div> <div style="border: 1px solid black; padding: 5px; display: inline-block; margin-left: 20px;">Clear</div> </div>

The **Current Benefits Summary** page displays for the applicable employee with the **Benefit Enrollment Summary** tab displayed by default.



Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACCH	COVAEVIH	Family	07/01/2022
Individual Life	Elect	ISPLIF	ISPLIF	Salary X 2	05/25/2019
402(b)	Waive			Waived	10/01/2022
Section 457	Waive			Waived	10/01/2022
VRS HB Vol Defined Core	Elect	HVCSD	HVCSD	0% Return Tax	09/25/2022
Flex Spending Medical	Waive			Waived	07/01/2022
Flex Spending Dependent Care	Waive			Waived	07/01/2022
Employee Retirement DB	Elect	HVRMDB	VRS HB MDB	4% of Earnings	09/25/2022
Hybrid Retirement	Elect	HIBDBR	HIBDBR	0% of Earnings	09/25/2022
Group Term Life	Elect	OTLR	OTL_Rtg	0% of Earnings	09/25/2022



Review the information within the **Current Enrollments** section and reconcile against the benefits enrollment form submitted by the employee to ensure accuracy.

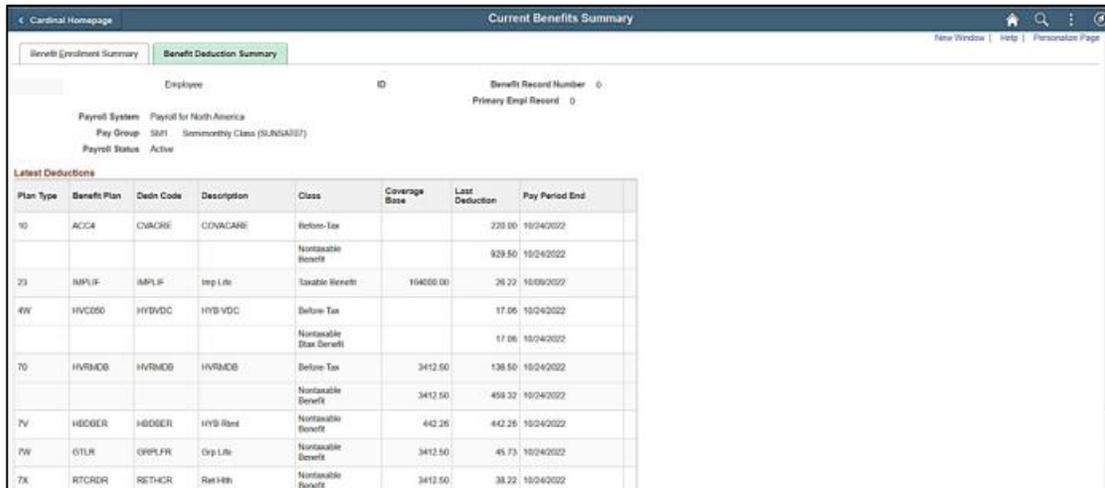
If any data entry errors are identified, refer to the Job Aid titled **BN361_Re-opening and Reprocessing a Benefit Event**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

4.	Click the Benefit Deduction Summary tab. <div style="border: 1px solid black; padding: 10px; margin: 10px auto; width: fit-content;"> <div style="border: 1px solid black; padding: 5px; display: inline-block; background-color: #e0f0e0;">Benefit Enrollment Summary</div> <div style="border: 2px solid red; padding: 5px; display: inline-block; margin-left: 20px;">Benefit Deduction Summary</div> </div>
----	---

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Benefit Deduction Summary** tab displays.



Cardinal Homepage | Current Benefits Summary

Benefit (Enrollment Summary) | **Benefit Deduction Summary**

Employee ID: [Redacted] | Benefit Record Number: 0
Primary Empl Record: 0

Payroll System: Payroll for North America
Pay Group: SM1 | Semi-monthly Class (SUNSA337)
Payroll Status: Active

Latest Deductions

Plan Type	Benefit Plan	Dedn Code	Description	Class	Coverage Base	Last Deduction	Pay Period End
10	ACCA	CVACRE	CVACARE	Before-Tax		239.00	10/24/2022
				Non-taxable Benefit		929.50	10/24/2022
23	IMPLF	IMPLF	Imp Life	Taxable Benefit	194000.00	26.22	10/24/2022
4W	HVC050	HYBVDG	HYB VDC	Before-Tax		17.06	10/24/2022
				Non-taxable (Plan Benefit)		17.06	10/24/2022
70	HVRM00	HVRM00	HVRM00	Before-Tax	3412.50	138.50	10/24/2022
				Non-taxable Benefit	3412.50	459.32	10/24/2022
7V	HDB00R	HDB00R	HYB 00rd	Non-taxable Benefit	442.26	442.26	10/24/2022
7W	OTLR	ORPLFR	Op Life	Non-taxable Benefit	3412.50	45.73	10/24/2022
7X	RTCR0R	RETHCR	Res Hdb	Non-taxable Benefit	3412.50	38.22	10/24/2022



Review the employee's pay group, payroll status, and deductions information to ensure accuracy. If any issues are identified, coordinate corrective action with an Agency HR Administrator and/or an Agency Payroll Administrator.

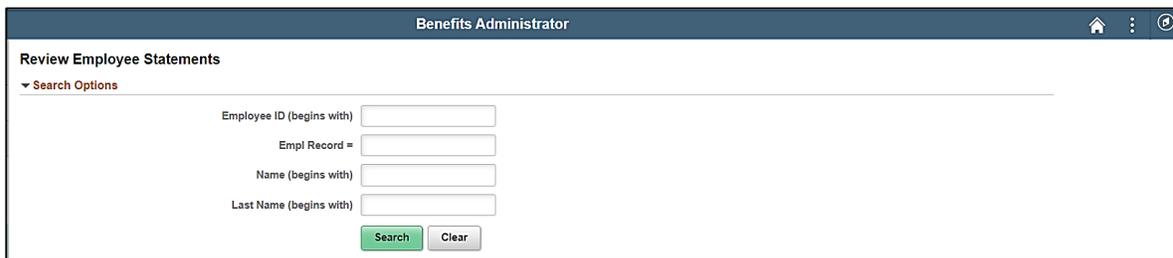
BN361_Creating and Completing a Life Event on behalf of an Employee

Viewing/Printing a Confirmation Statement

After completing the benefits enrollment change, the employee should receive an email with their Confirmation Statement after the next Benefits Administration process runs. However, if the employee does not have an email defined in Cardinal yet, or did not receive the email, the Agency BA can follow the steps in this section to view and print a Confirmation Statement for the employee.

Step	Action
1.	Navigate to the Review Employee Statements page using the following path: Benefits Administrator Tile > Review Employee Benefits > Review Employee Statements

The **Review Employee Statements Search** page displays.



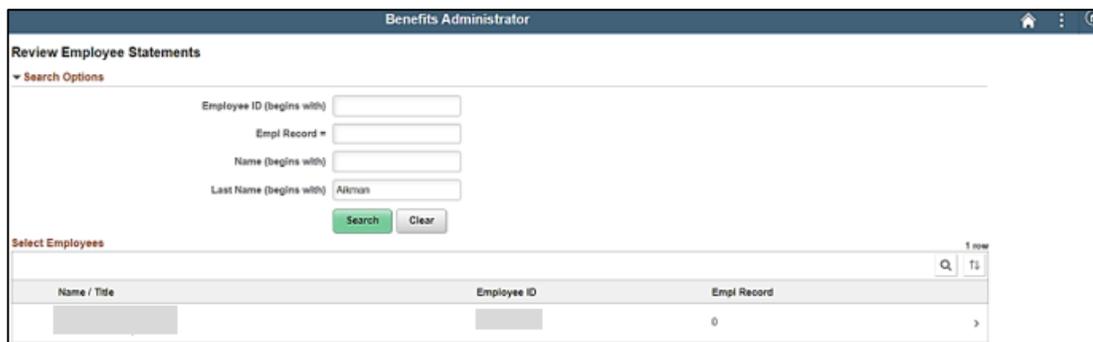
2. Enter the employee's Employee ID in the **Empl ID** field.
Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.



3. Click the **Search** button.



The page refreshes with the search results displayed in the **Select Employees** section.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

4. Click anywhere in the corresponding row for the employee within the **Select Employees** section.



Name / Title	Employee ID	Empl Record
[Redacted]	[Redacted]	0

The **Review Employee Statements** page displays for the selected employee.

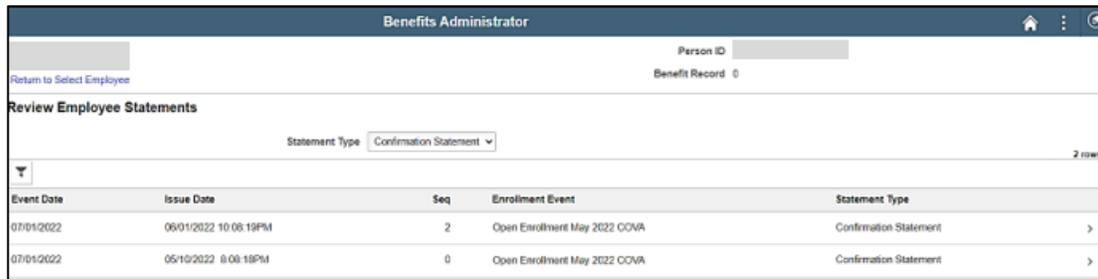


Event Date	Issue Date	Seq	Enrollment Event	Statement Type
07/01/2022	06/01/2022 10:08:18PM	2	Open Enrollment May 2022 COVA	Confirmation Statement
07/01/2022	05/10/2022 8:08:18PM	0	Open Enrollment May 2022 COVA	Confirmation Statement

5. Click the **Statement Type** dropdown button and select "Confirmation Statement".



The page refreshes.



Event Date	Issue Date	Seq	Enrollment Event	Statement Type
07/01/2022	06/01/2022 10:08:18PM	2	Open Enrollment May 2022 COVA	Confirmation Statement
07/01/2022	05/10/2022 8:08:18PM	0	Open Enrollment May 2022 COVA	Confirmation Statement

6. Click anywhere in the corresponding row for the applicable Benefit Event (Open Enrollment May 2022 COVA (Seq Number 2) will be opened in this example).

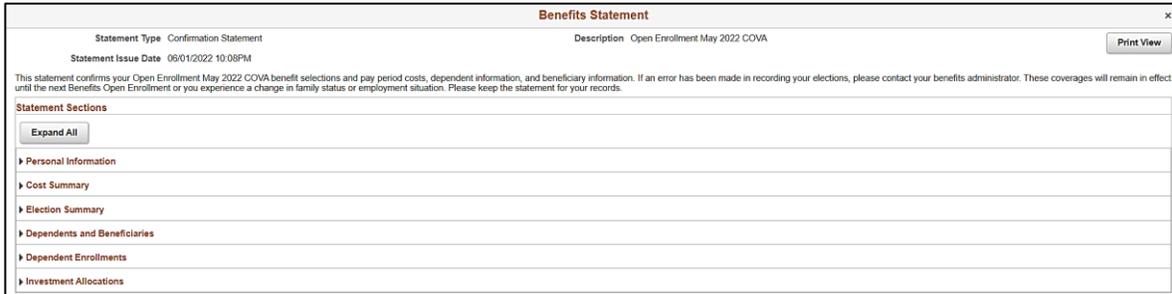


Event Date	Issue Date	Seq	Enrollment Event	Statement Type
07/01/2022	06/01/2022 10:08:18PM	2	Open Enrollment May 2022 COVA	Confirmation Statement
07/01/2022	05/10/2022 8:08:18PM	0	Open Enrollment May 2022 COVA	Confirmation Statement

BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Benefits Statement** page displays for the applicable Benefit Event.

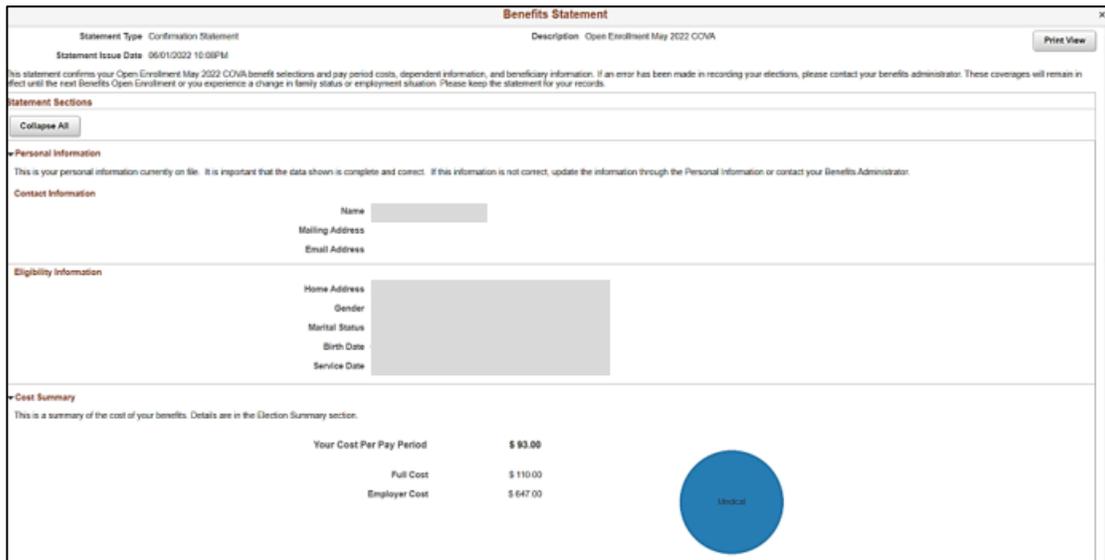


The screenshot shows a web browser window titled "Benefits Statement". At the top, it displays "Statement Type: Confirmation Statement" and "Description: Open Enrollment May 2022 COVA". Below this, there is a "Statement Issue Date" of "05/01/2022 10:08PM" and a "Print View" button. A paragraph of text explains that the statement confirms benefit selections and pay period costs. Below the text is a section titled "Statement Sections" with an "Expand All" button. Underneath, several sections are listed with expandable arrows: Personal Information, Cost Summary, Election Summary, Dependents and Beneficiaries, Dependent Enrollments, and Investment Allocations.

7. Click the **Expand All** button to view the detailed information.



The page refreshes with the sections expanded.



The screenshot shows the "Benefits Statement" page with sections expanded. The "Personal Information" section is expanded, showing "Contact Information" (Name, Mailing Address, Email Address) and "Eligibility Information" (Home Address, Gender, Marital Status, Birth Date, Service Date). The "Cost Summary" section is also expanded, showing a table of costs:

Cost Type	Amount
Your Cost Per Pay Period	\$ 93.00
Full Cost	\$ 110.00
Employer Cost	\$ 647.00

A blue circular icon with the word "Vertical" is visible at the bottom right of the page, indicating a vertical scrollbar.



Review the information as needed. Use the vertical scrollbar to scroll down and view all of the information.

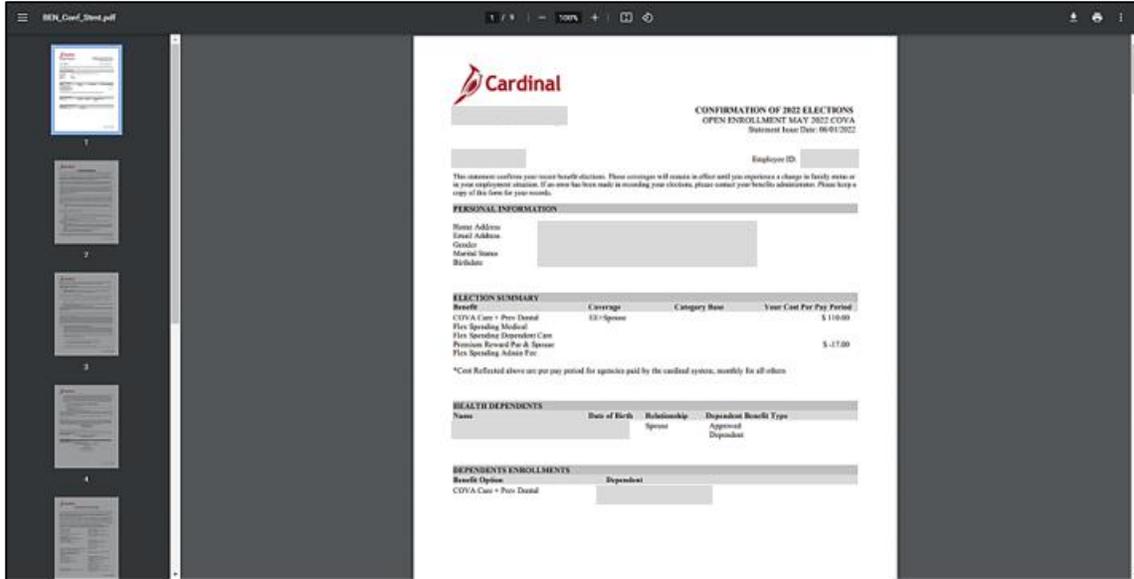
8. Click the **Print View** button.



BN361_Creating and Completing a Life Event on behalf of an Employee

Step	Action
------	--------

The **Confirmation Statement** opens as a PDF document. If the Confirmation Statement does not display, the user may need to allow pop-ups from the website.



Save and/or print the document as needed.