

Employee Event Detail Page Overview

This Job Aid provides guidance on how to review details related to the nature and status of a Benefit Event on the **Employee Event Details** page. This page is also helpful when troubleshooting Benefit Event errors.

This page includes the following:

- Event, Eligibility, and Processing Information
- Information related to Plan Types
- Option and Cost information associated with elected plans and coverage codes

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

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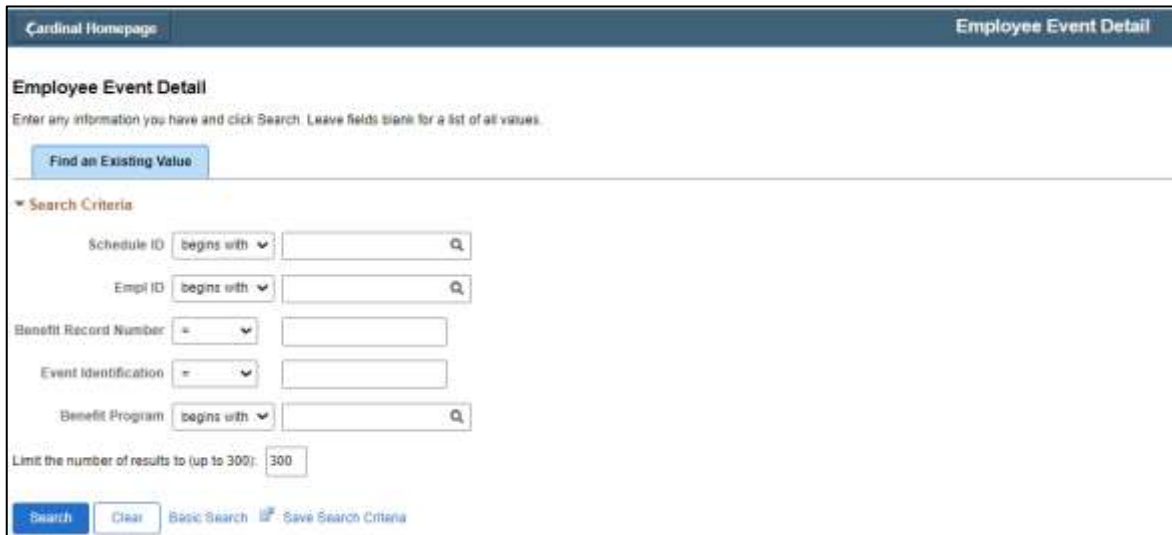
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Employee Event Detail Page

To view relevant details related to the nature and status of a Benefit Event, the Agency Benefit Administrator would access the **Employee Event Detail** page.

Step	Action
1.	Navigate to the Employee Event Detail page using the following path: Menu > Benefits > Manage Automated Enrollment > Review Processing Results > Employee Event Detail

The **Employee Event Detail Search** page displays.



2.	Enter or select the appropriate Schedule ID using the Schedule ID Look Up icon. 
	To see all Benefit Events for an employee, leave the Schedule ID field blank. In most cases the value will be "EM00" unless viewing Open Enrollment Benefit Events.
3.	Enter or select the applicable Employee ID using the Empl ID Look Up icon. 
4.	Click the Search button. 

Step	Action
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The **Employee Event Details** page displays with the **Participant** tab selected.

Participant
Plan Type
Option and Cost

Sched ID EM00 Event Maintenance

Empl ID

Benefit Record 0

Event Information

ID	4	Empl Record	0
Status	Closed to Processing	Date	10/01/2023
Class	BIR Birth or Adoption	Effseq	0
Source	Manual Event	Priority	410

Multi-Activity Indicator

Eligibility Information

Empl Record	0
COBRA Action	
Addr Effdt	02/09/2023
Job Effdt	09/29/2023
Effseq	0

Processing Information

Benefit Program	SAL Salaried Employee Benefit Pgm	<input type="checkbox"/> Address Eligibility Changed		
Process Status	Finalized - Enrolled	<input type="checkbox"/> MultiJob Indicator Changed		
Status Date	11/02/2023	<input type="checkbox"/> Job Eligibility Changed		
Process Indicator	Normal Processing	<input type="checkbox"/> Event Out of Sequence		
Election Source	Online	<input type="checkbox"/> Event Disconnected		
Excess Credit	Forfeit Excess Credits	<input checked="" type="checkbox"/> Available through Self Service		
Option Notify	10/27/2023	Election Rcvd	10/27/2023	<input type="checkbox"/> Finalize/Apply Defaults
Confirm Notify	11/02/2023	Confirm Rcvd		
Suppress Forms	Print Both Forms	Enrl/Print Days	0	







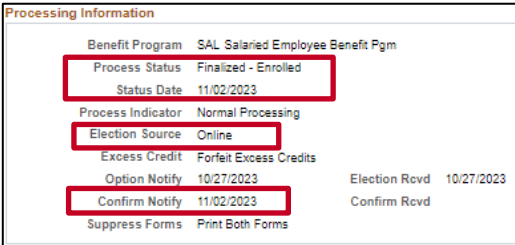
Numerous Benefit Events can occur simultaneously, all in varying points in the process with different statuses.


The following sub-sections within this Job Aid provide an overview of the information available for review on each of the tabs contained on this page.

Participants

The **Participants** tab reflects various information related to a Benefit Event. There are several important items on the **Participants** tab for the Agency BA to understand:

Step	Action																				
	<p>The Event Information section:</p> <ol style="list-style-type: none"> Event Status: Identifies the current status for the Benefit Event (“Open”, “Closed”, “Disconnected”, or “Voided”) Event Source: Displays the trigger for the Benefit Event such as a changed employee address, job information, Medicare updates, or the insertion of a manual Benefit Event. Note that this field does not distinguish between a manual Benefit Event such as Birth entered by the employee in ESS or a BIR Benefit Event created by the BA using the Benefit Event Entry page. It will simply state “Manual Event” <div data-bbox="293 827 1468 1150" style="border: 1px solid black; padding: 10px;"> <p>Event Information</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%;">ID</td> <td style="width: 30%;">4</td> <td style="width: 20%;">Empl Record</td> <td style="width: 20%;">0</td> </tr> <tr> <td>Status</td> <td>Closed to Processing</td> <td>Date</td> <td>10/01/2023</td> </tr> <tr> <td>Class</td> <td>BIR Birth or Adoption</td> <td>Effseq</td> <td>0</td> </tr> <tr> <td>Source</td> <td>Manual Event</td> <td>Priority</td> <td>410</td> </tr> <tr> <td colspan="4" style="text-align: center;"><input type="checkbox"/> Multi-Activity Indicator</td> </tr> </table> </div>	ID	4	Empl Record	0	Status	Closed to Processing	Date	10/01/2023	Class	BIR Birth or Adoption	Effseq	0	Source	Manual Event	Priority	410	<input type="checkbox"/> Multi-Activity Indicator			
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Class	BIR Birth or Adoption	Effseq	0																		
Source	Manual Event	Priority	410																		
<input type="checkbox"/> Multi-Activity Indicator																					


Step	Action
	<p>The Eligibility Information section:</p> <ol style="list-style-type: none"> Emp Rcd: Displays the Employee Record of the job used to determine eligibility COBRA Action: If the Benefit Event is associated with an action that may make the employee eligible for COBRA coverage, the system displays that action code (e.g., DIV, TER) Address Effdt: Displays the effective date of the address (state or postal code) used to evaluate eligibility Job Effdt: Displays the effective date of the job data used to evaluate eligibility 
	<p>The Processing Information section:</p> <ol style="list-style-type: none"> Processing Status: Indicates the step that the Benefit Event is at in the Ben Admin process. This status changes as the Benefit Event moves through the process (“Prepared”, “Notified”, “Entered”, “Finalized-Enrolled”) Status Date: Displays the date that the Benefit Event moved to the process status indicated Election Source: This field identifies how the election was made. “Online” indicates that a Benefit Administrator made the election on behalf of the employee. “Web” indicates that the employee made the election through Employee Self-Service (ESS). “None” indicates that the Benefit Event was finalized with no elections entered Confirm Notify: Displays the date that the system sent an email notifying the employee that a Confirmation Statement is available to view online 

Step	Action
	<p>There are a series of checkboxes or “flags” that reflect the type of changes made to an employee’s data that may impact benefit eligibility. The BA can review the information shown under this section and interpret what each possible “flag” means:</p> <ol style="list-style-type: none"> Job or Address Eligibility Changed: The system flags these events when the HR data used for processing event eligibility is changed, a new row affecting eligibility is inserted, or the row used for eligibility is deleted Event Out of Sequence: The Event Out of Sequence flag refers to Benefit Events that have been processed out of order according to their effective date or priority. An out of sequence Benefit Event might need to be reprocessed because an earlier, opened Benefit Event might have changed the defaults, eligibility, or event rule processing results for the later, closed Benefit Event Event Disconnected: The Event Disconnected flag generally refers to open or closed Benefit Events based on job rows that have been deleted. It can also refer to an open Benefit Event where the BAS Group ID has been changed. <div data-bbox="289 926 672 1220" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p> <input checked="" type="checkbox"/> Address Eligibility Changed <input type="checkbox"/> MultiJob Indicator Changed <input checked="" type="checkbox"/> Job Eligibility Changed <input type="checkbox"/> Event Out of Sequence <input checked="" type="checkbox"/> Event Disconnected <input checked="" type="checkbox"/> Available through Self Service <input type="checkbox"/> Finalize/Apply Defaults </p> <p>Enrl/Print Days 0</p> </div>

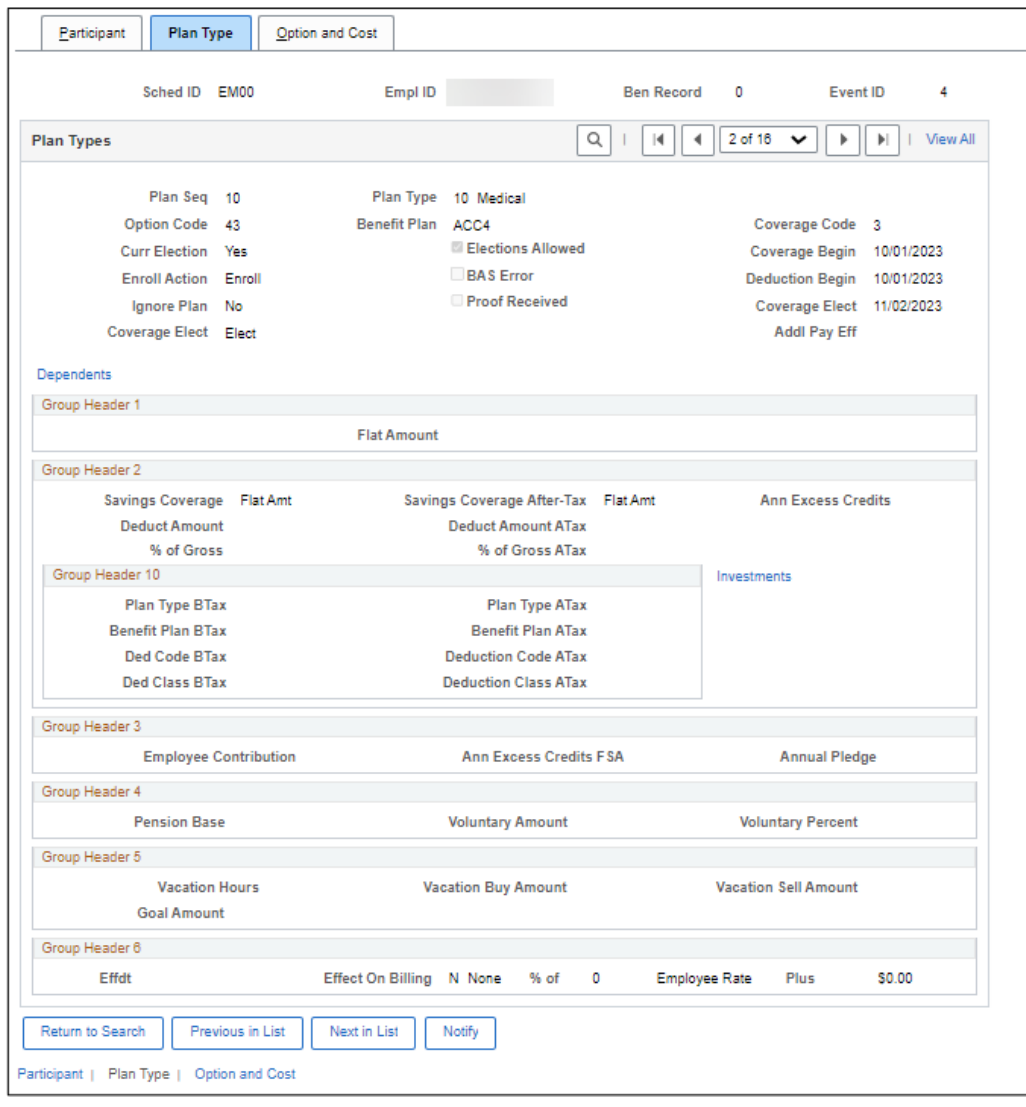


Plan Type

The Plan Type tab is used to view information for each Plan Type. Use the arrow keys to toggle between the different plan types for the employee. In addition, users can click on the Dependents hyperlink to view the names of the dependents that the employee is covering.

Step	Action
1.	Click the Plan Type tab. 

The Plan Type page displays.




The screenshot shows the 'Plan Type' tab selected. At the top, there are tabs for 'Participant', 'Plan Type', and 'Option and Cost'. Below the tabs, the page displays employee information: Sched ID EM00, Empl ID (redacted), Ben Record 0, and Event ID 4. The main section is titled 'Plan Types' and includes a search bar and navigation controls. The plan details are as follows:

Plan Seq	10	Plan Type	10 Medical	Coverage Code	3
Option Code	43	Benefit Plan	ACC4	Coverage Begin	10/01/2023
Curr Election	Yes	<input checked="" type="checkbox"/> Elections Allowed		Deduction Begin	10/01/2023
Enroll Action	Enroll	<input type="checkbox"/> BAS Error		Coverage Elect	11/02/2023
Ignore Plan	No	<input type="checkbox"/> Proof Received		Addl Pay Eff	
Coverage Elect	Elect				

Below the plan details is a 'Dependents' section with several group headers:


- Group Header 1: Flat Amount
- Group Header 2: Savings Coverage, Flat Amt, Savings Coverage After-Tax, Flat Amt, Ann Excess Credits, Deduct Amount, Deduct Amount ATax, % of Gross, % of Gross ATax
- Group Header 10: Plan Type BTax, Plan Type ATax, Benefit Plan BTax, Benefit Plan ATax, Ded Code BTax, Deduction Code ATax, Ded Class BTax, Deduction Class ATax
- Group Header 3: Employee Contribution, Ann Excess Credits FSA, Annual Pledge
- Group Header 4: Pension Base, Voluntary Amount, Voluntary Percent
- Group Header 5: Vacation Hours, Vacation Buy Amount, Vacation Sell Amount, Goal Amount
- Group Header 8: Effdt, Effect On Billing, N None, % of 0, Employee Rate, Plus, \$0.00

At the bottom, there are navigation buttons: 'Return to Search', 'Previous in List', 'Next in List', and 'Notify'. A breadcrumb trail at the very bottom reads: Participant | Plan Type | Option and Cost.

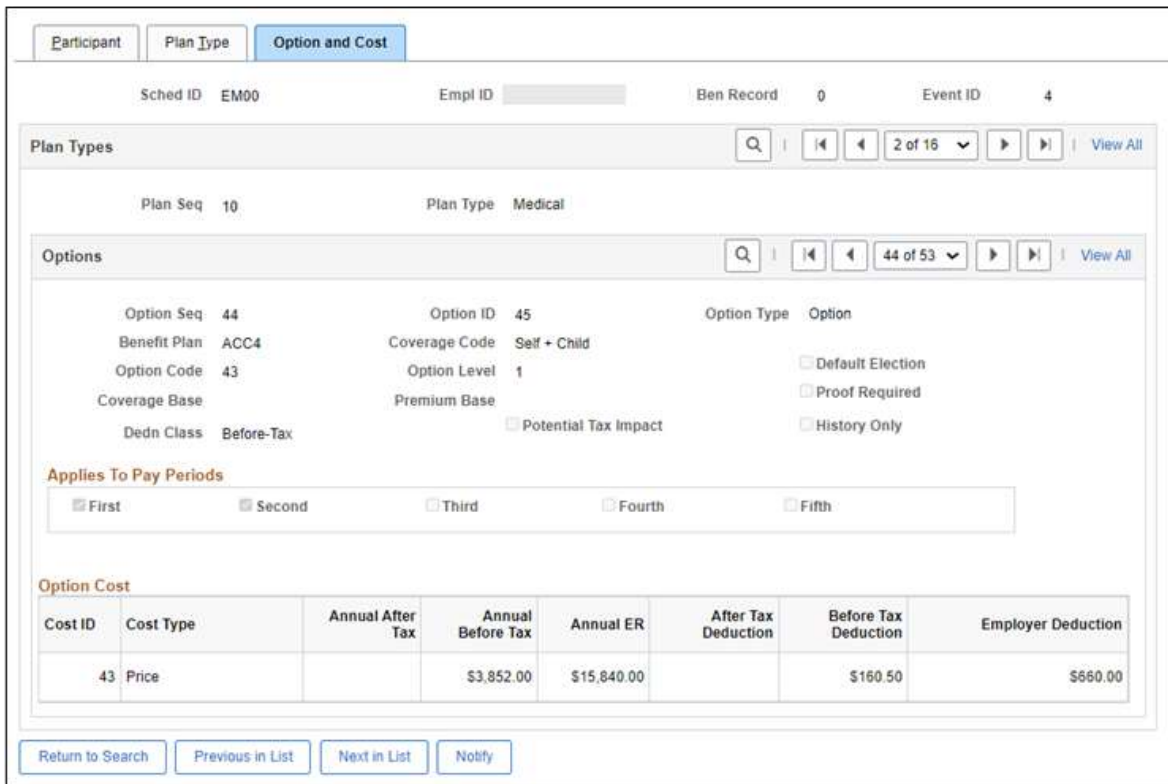
Step	Action																		
	<p>Review the following information on this tab for each Plan Type:</p> <ol style="list-style-type: none"> Curr Election: Indicates that an employee kept their current election Enroll Action: The action taken by the Benefit Event for the plan type. “Enroll” indicates there was an election made. “None” indicates that no election was made. “Terminate” indicates that the prior election was terminated Coverage Elect: Indicates if the employee made an election, waived, or terminated the benefit Benefit Plan: Displays the Benefit Plan that the employee enrolled in Coverage Code: Displays the coverage level that the employee selected Coverage Begin: Displays the effective date of the coverage Deduction Begin: Displays the date payroll deductions begin Coverage Elect: Displays the date that the Benefit Event was finalized. This date matches the election date on the base benefit pages <div data-bbox="272 861 1485 1197" style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p>Plan Types 2 of 16 View All</p> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Plan Seq 10</td> <td style="width: 33%;">Plan Type 10 Medical</td> <td style="width: 33%;"></td> </tr> <tr> <td>Option Code 43</td> <td>Benefit Plan ACC4</td> <td>Coverage Code 3</td> </tr> <tr> <td>Curr Election Yes</td> <td><input checked="" type="checkbox"/> Elections Allowed</td> <td>Coverage Begin 10/01/2023</td> </tr> <tr> <td>Enroll Action Enroll</td> <td><input type="checkbox"/> BAS Error</td> <td>Deduction Begin 10/01/2023</td> </tr> <tr> <td>Ignore Plan No</td> <td><input type="checkbox"/> Proof Received</td> <td>Coverage Elect 11/02/2023</td> </tr> <tr> <td>Coverage Elect Elect</td> <td></td> <td>Add Pay Eff</td> </tr> </table> <p>Dependents</p> </div>	Plan Seq 10	Plan Type 10 Medical		Option Code 43	Benefit Plan ACC4	Coverage Code 3	Curr Election Yes	<input checked="" type="checkbox"/> Elections Allowed	Coverage Begin 10/01/2023	Enroll Action Enroll	<input type="checkbox"/> BAS Error	Deduction Begin 10/01/2023	Ignore Plan No	<input type="checkbox"/> Proof Received	Coverage Elect 11/02/2023	Coverage Elect Elect		Add Pay Eff
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Option and Cost

Use the **Option and Cost** tab to review the cost of the plans elected by the employee. This tab shows the cost associated with the plan and the coverage code that was elected.

Step	Action
1.	Click on the Option and Cost tab. 

The **Option and Cost** tab displays.



The screenshot shows the 'Option and Cost' tab selected. It displays the following information:

- Participant:** Sched ID EM00, Empl ID [redacted], Ben Record 0, Event ID 4
- Plan Types:** Plan Seq 10, Plan Type Medical
- Options:** Option Seq 44, Option ID 45, Option Type Option, Benefit Plan ACC4, Coverage Code Self + Child, Option Code 43, Option Level 1, Coverage Base, Dedn Class Before-Tax, Premium Base, Potential Tax Impact, Default Election, Proof Required, History Only.
- Applies To Pay Periods:** First, Second, Third, Fourth, Fifth
- Option Cost Table:**

Cost ID	Cost Type	Annual After Tax	Annual Before Tax	Annual ER	After Tax Deduction	Before Tax Deduction	Employer Deduction
43	Price		\$3,852.00	\$15,840.00		\$160.50	\$660.00

Buttons at the bottom: Return to Search, Previous in List, Next in List, Notify.



Use the arrow keys to toggle between the different Plan Types and review the cost information for the employee.