National Medical Support Notice (NMSN) and QMCSO Overview

A National Medical Support Notice (NMSN) requires the employer group health plan to extend health coverage to a child of an eligible participant. It is served upon the agency by the entity requiring the dependent coverage and requires that the information on the Rider is stored in Cardinal. A Qualified Medical Child Support Order (QMCSO) is received by the agency from the Employee. Rider information does not need to be stored in Cardinal. This job aid refers only to the National Medical Support Notice.

When a National Medical Support Notice (NMSN) is received by an Agency, it is the responsibility of the Benefit Administrator (BA) to enter the Rider information and process the DSS/National Medical Support Order event in Cardinal.

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to process the NMSN in Cardinal for each of the following scenarios:

- Processing the DSS/National Medical Support Order to Enroll Event when the dependent(s) already exists in Cardinal

- Processing the DSS/National Medical Support Order to Enroll Event when the dependent(s) does not already exist in Cardinal

- Processing a DSS/National Medical Support Order to Remove Event

This Job Aid also contains sections that provide the step-by-step instructions utilized by an Agency BA to complete the following after the DSS/National Medical Support Order 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 you may see 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.

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Revision History

Revision Date	Summary of Changes
3/1/2025	Updated the screenshots of the Search pages (Section 1, after Step 1; Section 2, after Step 1 and 14; Section 3, after Step 1 and 14; Section 4, after Step 1 and 5; Section 6, after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Validating the NMSN and Employee for Validity

The NMSN is sent by the court to the Agency outside of Cardinal. Prior to processing a DSS/National Medical Support Order event, the Benefits Administrator (BA) must first review the NMSN to determine if it meets the necessary legal requirements and validate that the employee is still employed by the Agency and being paid. Additionally, the BA must coordinate with an Agency Payroll Administrator or the Payroll Service Bureau to ensure that processing the NMSN event will not cause the employee to go over their State or Federal withholding limitations. Questions regarding the validity of court orders should be directed to the Office of Health Benefits (OHB).

This section of the Job Aid should be referenced prior to processing any DSS/National Medical Support Order event within Cardinal. The steps included in this section of the Job Aid are based on the following example scenario:

Scenario: A NMSN was received for an employee on 12/5/2023. As the BN Administrator, you need to verify that the employee is still employed by the Agency and being paid.

Step	Action
1.	Access the **Job Data** page using the following navigation path: **NavBar > Menu > Workforce Administration > Job Information > Job Data**

The **Job Data Search** page displays.

Step	Action
ℹ️	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 **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ▼] [＿＿＿＿＿＿]
3.	Click the **Search** button. [Search] [Clear]

The **Job Data** page displays for the applicable employee.
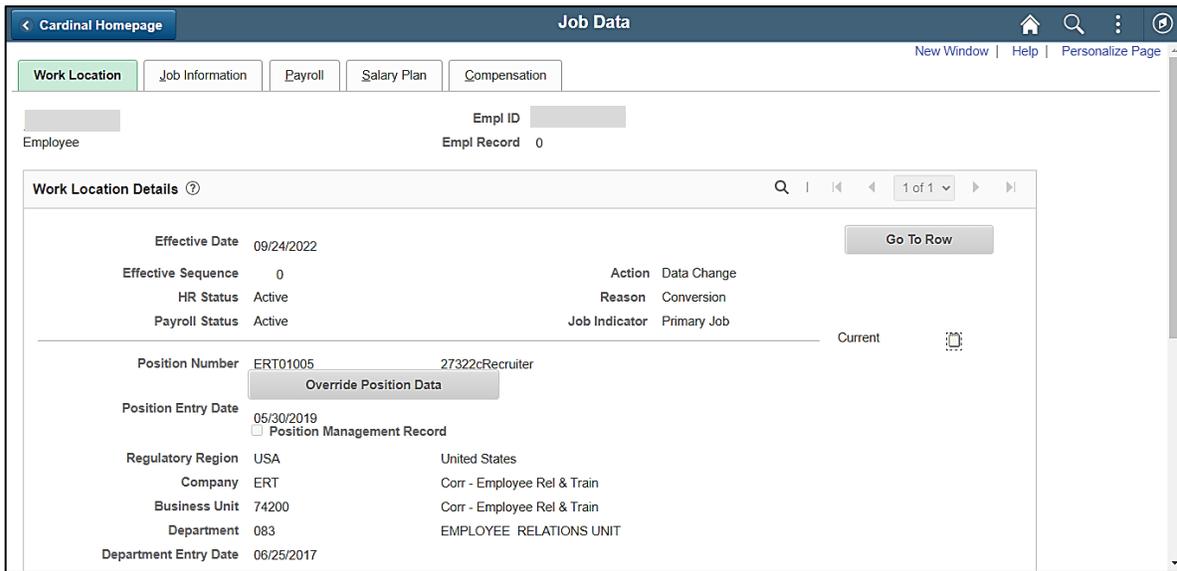
Step	Action
4.	Review the **HR Status** and the **Payroll Status** fields and ensure that they both display a status of "Active". Work Location Details ⓘ Effective Date 09/24/2022 Effective Sequence 0 HR Status Active Payroll Status Active
ⓘ	If the employee is no longer actively employed within the Agency or is not being paid, return the NMSN to the court in accordance with established Agency business practices.
5.	Once validated, notify the employee of the NMSN in accordance with established Agency business practices.

Processing a DSS/National Medical Support Order to Enroll Event (Dependent(s) already in Cardinal)

This section of the Job Aid should be referenced when you are creating and processing a DSS/National Medical Support Order to Enroll event when the dependent(s) requiring coverage per the NMSN are already in Cardinal. The steps included in this section of the Job Aid are based on the following example scenario:

Scenario: A NMSN was received for an employee on 12/5/2023 from a Virginia Court. The effective date of the NMSN is 12/3/2023. You have already validated the NMSN and verified that the employee is still employed by the Agency and being paid. This NMSN mandates that the employee maintains Health Plan coverage for their one named child dependent on the order through their 18th birthday (9/10/2031). The employee is currently enrolled in an "Employee + Child" plan and the named dependent is currently covered. You need to process this NMSN and mark the child dependent as a NMSN Rider to ensure that the child dependent is not inadvertently removed from the coverage prior to the mandated end date.

Step	Action
ⓘ	Generally speaking, the steps in this Job Aid can be used to create and process any DSS/National Medical Support Order to Enroll event wherein the dependent(s) are already in Cardinal. Be sure to use the actual dates and information from the NMSN when completing this process in Production.
1.	First, the Benefit Event must be created. Access the **Benefit Event Entry** page using the following navigation path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**

Step	Action
	The **Benefit Event Entry Find an Existing Value** page displays.
(i)	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 **Empl ID** field. **Note**: If there are more than one Empl Record or Benefit Record, be sure to select the correct record. Users can also search for the applicable employee using the various Name fields, Business Unit and Department if the Employee ID is not known.
3.	Click the **Search** button.

Step	Action
	The **Benefit Event Entry** page displays for the applicable employee.
4.	Click the **Life Event** dropdown button.
	The **Life Event** menu displays.
5.	Select the "DSS/National Medical Support Order to Enroll" list item.

Step	Action
	The **Benefit Event Entry** page redisplays with the selected Life Event.
6.	Click the **Life Event Date Calendar** icon and select the applicable date. **Note**: This is the date of the NMSN ("12/3/2023" in this scenario).
7.	Click the **Paperwork Receipt Date Calendar** icon and select the applicable date. **Note**: This is the date that the NMSN was received ("12/5/2023" in this scenario).
8.	Click the **Health Change Needed** dropdown button and select "Yes".
ℹ	Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select "Yes" as this Life Event will involve updating the information for a covered dependent. If "Yes" is not selected, a Benefit Event will not be created.

Step	Action
	The page refreshes. The **Current Cov. Level** field auto-populates with the employee's current Health Plan enrollment coverage level. *(Benefit Event screen — Benefit Event Detail tab)* **Life Event:** DSS/National Medical Support Order to Enroll **Life Event Date:** 12/03/2023 **Paperwork Receipt Date:** 12/05/2023 **Health Change** Health Change Needed: Yes Current Cov. Level: Self + Child Future Cov. Level: Change: **FSA Change** FSA Change Needed: Change: Special Processing Message (Health) Special Processing Message (FSA) Save Return to Search
9.	Click the **Future Cov. Level** dropdown button and select the applicable coverage level. Future Cov. Level:
ℹ	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 DSS/National Medical Support Order to Enroll event is processed.
10.	Click the **Change** dropdown button and select "Change an employee's plan and/or add court ordered dependent". Change:
ℹ	The selections available will vary based on the type of Life Event previously selected.

![Cardinal logo]

Step	Action
11.	Complete the fields within the **FSA Change** section regardless of whether the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the DSS/National Medical Support Order to Enroll Event. **Scenario**: Although no changes to the employee's FSA elections will be made. "No" must be selected for the event to create properly.
12.	Click the **Save** button.

The page refreshes.

Step	Action
13.	After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions.

Special Processing Message (Health)   A DSS event will be created for you to make this benefit change.   NOTE: National Medical Support Notices are served on the employer requiring coverage for the dependents listed in the order. Select and complete Riders/Orders Exist on the dependent profile.

Special Processing Message (FSA)

	The manual Benefit Event (DSS/National Medical Support Order to Enroll Event) is now created.
	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.

| 14. | Next, this DSS/National Medical Support Order to Enroll Event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path:

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

The **On-Demand Event Maintenance Find an Existing Value** page displays.

← Cardinal Homepage   On-Demand Event Maintenance

On-Demand Event Maintenance

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   Choose from recent searches   🔖 Saved Searches   Choose from saved searches

Empl ID   begins with
Empl Record   =
Name   begins with
Last Name   begins with
Second Last Name begins with
Alternate Character Name begins with
∧ Show fewer options
☐ Case Sensitive
[Search]   [Clear]

	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**.

Step	Action
15.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. Empl ID [begins with ∨] [ ]
16.	Click the **Search** button. [Search] [Clear]

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

Step	Action
17.	Review the **Activity Date** field. For DSS/National Medical Support Order Events, this date will be auto-populated based on the Life Event date previously entered. **Scenario**: The effective date is 1/1/2024. The 1st of the month following the paperwork receipt date. Ensure that this date is accurate. Activity Date [01/01/2024]
(i)	The **Source** field will be "Manual Event". The **Action** field will default to "DSS".

Step	Action
18.	Click the **Show Activities** button **only** if there is more than one activity. Since there is only one activity, proceed to the next step. Show Activities
19.	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 22. If the **Pending Activities** field displays a "1", click the **Schedule/Prepare Activity** button. Schedule/Prepare Activity Pending Activities 1
ⓘ	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.
20.	A **Confirmation** message displays in a pop-up window once the automated program completes. Click the **OK** button. Process completed successfully. (3000,530) OK

Step	Action
	The **On-Demand Event Maintenance** page redisplays.
21.	Confirm that the **Status** field displays as "Prepared" and the **Event Status** field displays as "Open for Processing".
22.	Click the **Election Entry** button.

Step	Action
	The **Election Entry** page displays in a pop-up window with the **Option Election** tab displayed by default.
23.	First, review the current Health Plan enrollment and coverage code for the employee. If adding the dependent as a NMSN Rider requires an update to the coverage code, click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section and select the applicable coverage code **Scenario**: The coverage code is already "Self + Child" and does not to be updated.
24.	Next, mark the child dependent as a NMSN Rider. Click the **Dependents / Beneficiaries** tab.
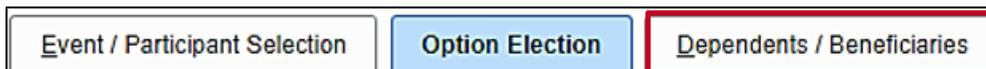
Step	Action
	The **Dependent / Beneficiaries** tab displays.
25.	Review the **Dependent/Beneficiaries Currently on Record** section and verify that the child dependent(s) on the NMSN is displayed.
26.	Click the **Change/Add Dependent Data** link.

Step	Action
	The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.
27.	Review the **Display Name** field and ensure that you are on the record for the applicable child dependent. Use the navigation arrows or the **View All** link within the **Dependent/Beneficiaries** section as needed to locate the applicable child dependent.
28.	Click the **Personal Profile** tab.

Step	Action
	The **Personal Profile** tab displays.
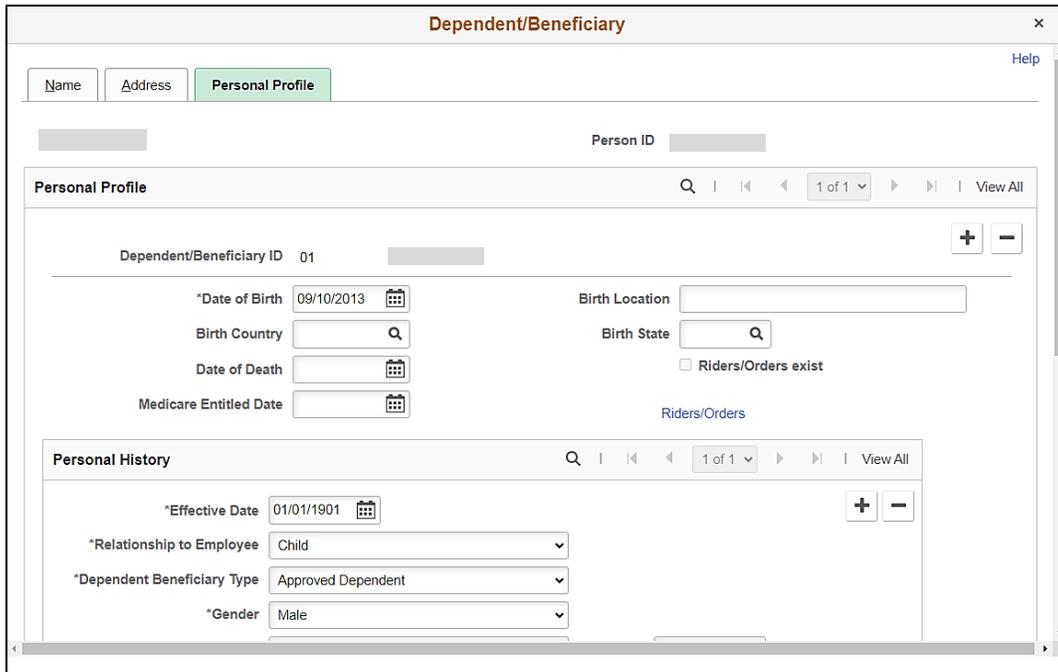
Step	Action
29.	Verify that the correct child dependent is displayed and then click the **Riders/Orders** link.

Riders/Orders

The **Dependent/Beneficiary Riders** page displays in a pop-up window.
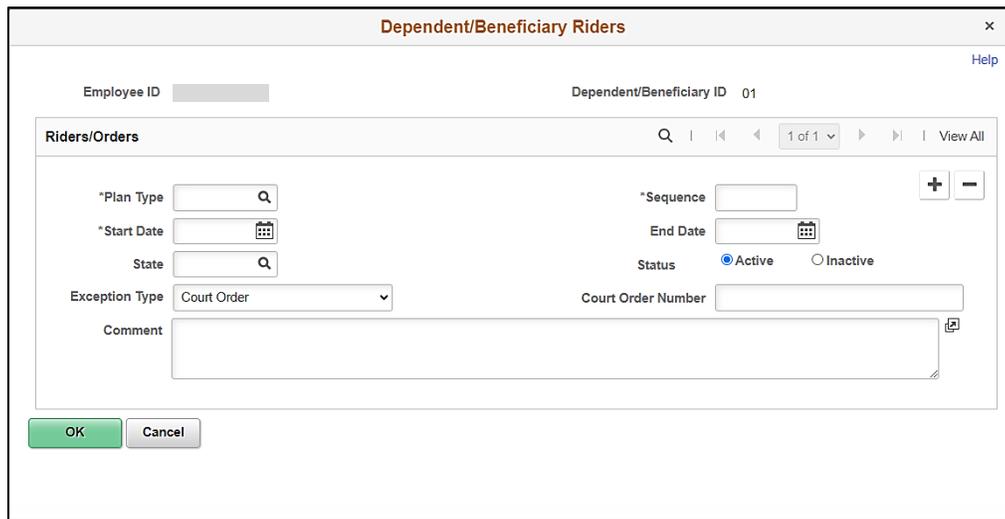
Step	Action
30.	Click the **Plan Type Look Up** icon and select the applicable plan type. **Scenario**: Medical is being selected as the employee is currently enrolled in a Medical + Expanded Dental Plan. *Plan Type [🔍]
31.	Enter "1" in the **Sequence** field. *Sequence [ ]
32.	Click the **Start Date Calendar** icon and select the applicable start date based on the dates provided in the NMSN ("12/3/2023" in this scenario). *Start Date [📅]
33.	Click the **End Date Calendar** icon and select the applicable end date if an end date is provided in the NMSN ("9/10/2031" in this scenario). End Date [📅]
34.	Click the **State Look Up** icon and select the applicable State that issued the NMSN (Virginia in this scenario). State [🔍]
35.	Verify that the **Active** radio button option is selected. Status ● Active ○ Inactive
36.	The **Exception Type** field defaults to "Court Order". Do not update. Exception Type [Court Order ⌄]
37.	Enter the NMSN Number in the **Court Order Number** field ("ACRVA123" in this scenario). Court Order Number [ ]
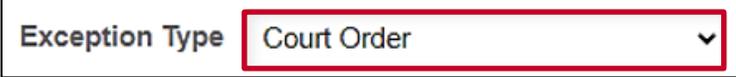
Step	Action
38.	Enter comments in the **Comment** field to include the date the NMSN was received and the address and contact information for the issuing entity.

Comment

Step	Action
39.	Click the **OK** button.

OK   Cancel

The **Personal Profile** tab redisplays.

Dependent/Beneficiary

Name Address **Personal Profile**

Person ID

Personal Profile   1 of 1   View All

Dependent/Beneficiary ID   01

*Date of Birth   09/10/2013   Birth Location
Birth Country   Birth State
Date of Death   ☑ Riders/Orders exist
Medicare Entitled Date   Riders/Orders

Personal History   1 of 1   View All

*Effective Date   01/01/1901
*Relationship to Employee   Child
*Dependent Beneficiary Type   Approved Dependent
*Gender   Male

Step	Action
40.	Verify that the **Riders/Order exist** checkbox option is selected (read-only).

☑ Riders/Orders exist

Step	Action
41.	Repeat Steps 26 – 40 for any additional child dependents that need to be marked as NMSN Riders.

Step	Action
42.	Scroll down to the bottom of the page and click the **OK** button.

	The **Dependents / Beneficiaries** tab redisplays.

BenAdmin Data Entry

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

Schedule ID	EM00	Employee ID
Event ID	6	Event Data 01/01/2024 DSS/Natl Med Support Notice
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
DANIEL,BENNETT E	Child	Approved Dependent	09/10/2013

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical		Enroll Dependents

OK | Cancel | Apply | Refresh

Step	Action
43.	Click the **Option Election** tab.

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

Step	Action
	The **Option Election** tab redisplays.
44.	Scroll down to the bottom of the page and click the **OK** button.
	The **On-Demand Event Maintenance** page redisplays.

Step	Action
(i)	The **Status** field will now display as "Entered". The **Event Status** field will still display as "Open for Processing". Event ID 6 Event Date 01/01/2024 **Status Entered** Class DSS Event Status Update Prepare Options **Event Status Open for Processing** Enrollment Statement Run Date **Frequency** ● Deduction Frequency ○ Annual Frequency
45.	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. Validate/Finalize Errors 0
46.	A **Confirmation** message displays in a pop-up window once the process completes. Click the **OK** button. Process completed successfully. (3000,530) [OK]
	The **On-Demand Event Maintenance** page redisplays. < On-Demand Event Maintenance On-Demand Event Maintenance **On-Demand Event Maintenance** Person ID _____ Ben Record 0 **Activity Date** **Source** **Empl Record** 0 Schedule/Prepare Activity Pending Activities 0 Show Activities Action **Event ID** 6 **Event Date** 01/01/2024 Status Finalized - Enrolled Class DSS Event Status Update Prepare Options Event Status Closed to Processing 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]

Step	Action
ⓘ	The **Status** field will now display as "Finalized-Enrolled". The **Event Status** field will still display as "Closed to Processing".
47.	Click the **Save** button. Save Return to Search Notify
ⓘ	This process is now complete. Refer to the Viewing the Employee's Benefit Information section of this Job Aid to validate accuracy. Refer to the Viewing/Printing a Confirmation Statement if you need to print the Confirmation Statement for the employee or the NMSN Issuing Entity.

Processing a DSS/National Medical Support Order to Enroll Event (Dependent(s) not already in Cardinal)

This section of the Job Aid should be referenced when you are creating and processing a DSS/National Medical Support Order to Enroll event when the dependent(s) requiring coverage per the NMSN are **not** already in Cardinal. The steps included in this section of the Job Aid are based on the following example scenario:

Scenario: A NMSN was received for an employee on 12/5/2023 from a North Carolina Court. The effective date of the NMSN is 12/3/2023. You have already validated the NMSN and verified that the employee is still employed by the Agency and being paid. This NMSN mandates that the employee maintains Health Plan coverage for their one named child dependent on the order through their 18th birthday (9/10/2031). The employee is currently enrolled in a "Single" plan and the named dependent is not currently covered. You need to process this NMSN to enroll the child dependent in coverage and mark the child dependent as a NMSN Rider to ensure that the child dependent is not inadvertently removed from the coverage prior to the mandated end date.

Note: Generally speaking, the steps in this Job Aid can be used to create and process any DSS/National Medical Support Order to Enroll event wherein the dependent(s) are not already in Cardinal. Be sure to use the actual dates and information from the NMSN when completing this process in Production.

Step	Action
1.	First, the Benefit Event must be created. Access the **Benefit Event Entry** page using the following navigation path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**

Step	Action
	The **Benefit Event Entry Find an Existing Value** page displays.
(i)	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 **Empl ID** field. **Note**: If there are more than one Empl Record or Benefit Record, be sure to select the correct record. Users can also search for the applicable employee using the various Name fields, Business Unit and Department if the Employee ID is not known.
3.	Click the **Search** button.

Step	Action
The **Benefit Event Entry** page displays for the applicable employee.	

Step	Action
4.	Click the **Life Event** dropdown button.

The **Life Event** menu displays.

Step	Action
5.	Select the "DSS/National Medical Support Order to Enroll" list item.

Step	Action
	The **Benefit Event Entry** page redisplays with the selected Life Event.

Step	Action
6.	Click the **Life Event Date Calendar** icon and select the applicable date. **Note**: This is the date of the NMSN ("12/3/2023" in this scenario).
7.	Click the **Paperwork Receipt Date Calendar** icon and select the applicable date. **Note**: This is the date that the NMSN was received ("12/5/2023" in this scenario).
8.	Click the **Health Change Needed** dropdown button and select "Yes".
ℹ	Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select "Yes" as this Life Event will require adding a new dependent to the coverage. If "Yes" is not selected, a Benefit Event will not be created.

Step	Action

The page refreshes. The **Current Cov. Level** field auto-populates with the employee's current Health Plan enrollment coverage level.

‹ Benefit Event Detail			Benefit Event

Benefit Event Detail

Employee   ID   Benefit Record Number   0

Life Event   [🔍] | |◀ ◀ 1 of 1 ▼ ▶ ▶| | View All

Life Event   DSS/National Medical Support Order to Enroll ▼   [+]

Life Event Date   12/03/2023 📅   Paperwork Receipt Date   12/05/2023 📅

Health Change   **FSA Change**

Health Change Needed: Yes ▼   FSA Change Needed: ▼

Current Cov. Level: Single   Future Cov. Level: ▼

Change: ▼   Change: ▼

Special Processing Message (Health) [ ]

Special Processing Message (FSA) [ ]

[Save] [Return to Search]

| 9. | Click the **Future Cov. Level** dropdown button and select the applicable coverage level. |
| | Future Cov. Level: [▼] |

| ℹ | 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. |

| 10. | Click the **Change** dropdown button and select the applicable list item ("Change an employee's plan and/or add court ordered dependent" in this scenario). |
| | Change: [Change an employee's plan and/or add court ordered dependent. ▼] |

| ℹ | The selections available will vary based on the type of Life Event previously selected. |

Step	Action
11.	Complete the fields within the **FSA Change** section regardless of whether the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the DSS/National Medical Support Order to Enroll event. **Scenario**: Although no changes to the employee's FSA elections will be made. "No" must be selected for the event to create properly.
12.	Click the **Save** button.
13.	After saving, review the messages in the **Special Processing Message (Health)** and **Special Process Message (FSA)** fields. These messages will provide next step instructions.
ⓘ	The manual Benefit Event (DSS/National Medical Support Order to Enroll Event) is now created. 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.
14.	Next, this DSS/National Medical Support Order to Enroll Event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

Step	Action
	The **On-Demand Event Maintenance Find an Existing Value** page displays.

(i)	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**.
15.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
16.	Click the **Search** button.
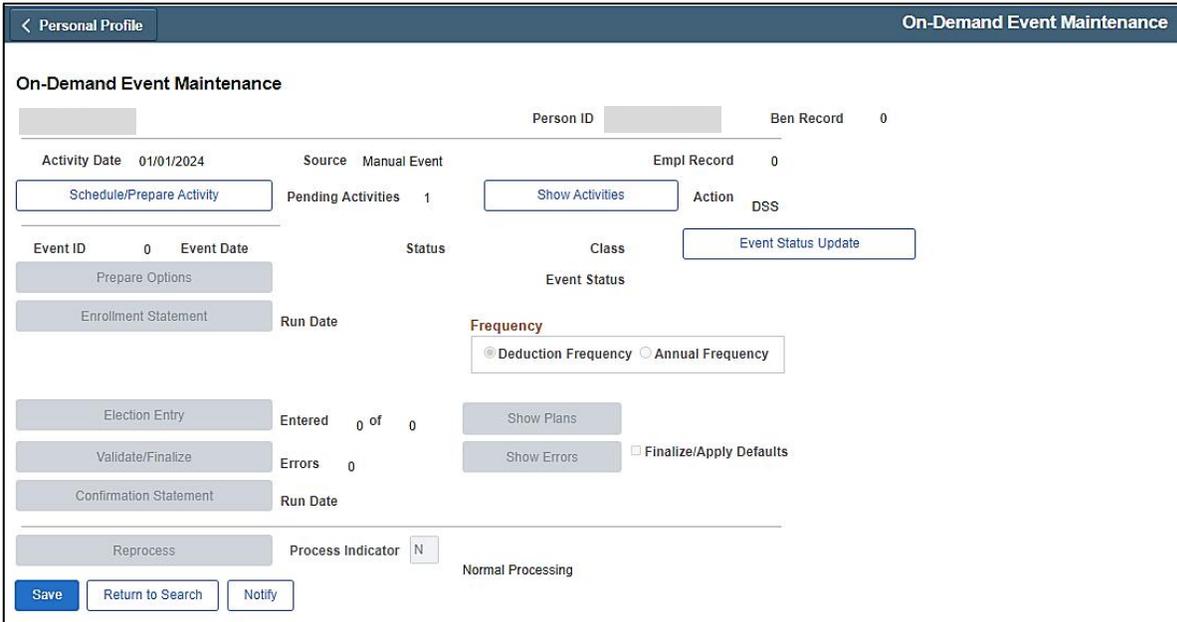
Step	Action
	The **On-Demand Event Maintenance** page displays for the applicable employee.
17.	Review the **Activity Date** field. For DSS/National Medical Support Order events, this date will be auto-populated based on the Life Event date previously entered. **Scenario**: The effective date is 1/1/2024. The 1st of the month following the paperwork receipt date.
ⓘ	The **Source** field will be "Manual Event". The **Action** field will default to "DSS".
18.	Click the **Show Activities** button only if there is more than one activity.

Step	Action
19.	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 22. If the **Pending Activities** field displays a "1", click the **Schedule/Prepare Activity** button. Schedule/Prepare Activity
ℹ	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.
20.	A **Confirmation** message displays in a pop-up window once the automated program completes. Click the **OK** button. Process completed successfully. (3000,530) OK

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

Step	Action
21.	Confirm that the **Status** field displays as "Prepared" and the **Event Status** field displays as "Open for Processing". Event ID 4 Event Date 01/01/2024 Status Prepared Class DSS Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency ◉ Deduction Frequency ○ Annual Frequency
22.	Click the **Election Entry** button. Election Entry

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

BenAdmin Data Entry

Help

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

Sched ID EM00   Empl ID   Ben Record 0   Event ID 4
Event Data 01/01/2024 DSS/Natl Med Support Notice   Excess Credit Rollover To   Forfeit Excess Credits

▼ Available Plans and Options ⓘ   🔍 | 1 of 1 ⌄

Plan Type 10 : Medical

Option Code 41 🔍   COVA Cr+Exp Den+Vision&Hrng (ACC4) (Single)

Health Provider ID   ☐ Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
-----	------	-------------------------	-------------------	-----------------	--------------------	--------------	
🔍				☐		☐	—

Step	Action
23.	First, add the new dependent(s). Click the **Dependents / Beneficiaries** tab. Event / Participant Selection Option Election Dependents / Beneficiaries

Step	Action

The **Dependents / Beneficiaries** tab displays.

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

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

Step	Action
ℹ️	For DSS Medical Support Order Events, the **Effective Date** field defaults to Life Event date previously selected (1st of month following the date that the NMSN was received, which is 1/1/2024 in this scenario). The **Dependent/Beneficiary ID** field will default to "01" for the first dependent and increment by 1 for each additional dependent subsequently added.
25.	Click the **Edit Name** button. Edit Name

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

Name	✕

Help

English Name Format

Name Prefix ⌄

*First Name _____

Middle Name _____

*Last Name _____

Name Suffix ⌄

Display Name

Formal Name

Name

OK   Cancel   Refresh Name

Step	Action
26.	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. *First Name _____ Middle Name _____ *Last Name _____

Step	Action
27.	Click the **Refresh Name** button. **Refresh Name**

The **Name** page refreshes.

	The **Display Name**, **Formal Name**, and **Name** fields will populate based on the name information entered.
28.	Click the **OK** button. OK Cancel Refresh Name

Step	Action
	The **Name** tab redisplays.
29.	Click the **Address** tab.
	The **Address** tab displays.
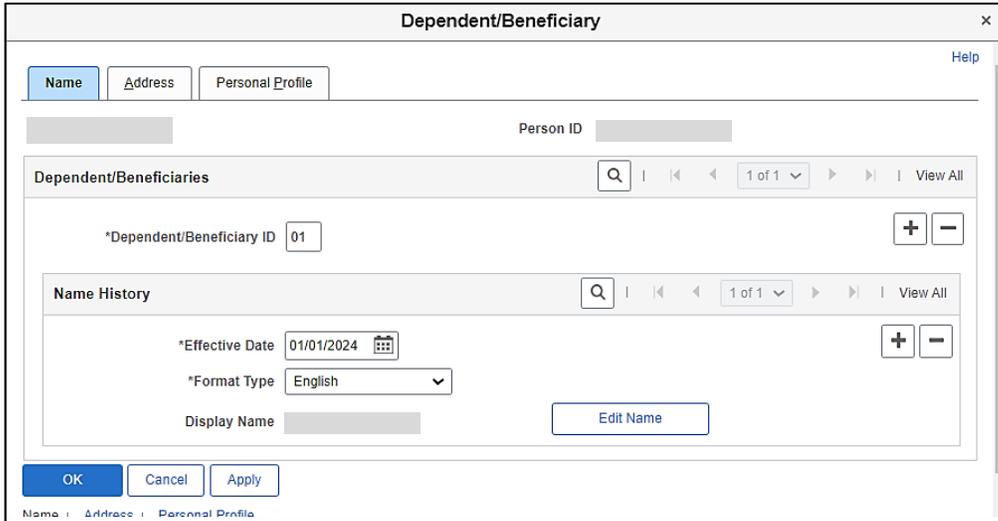
Step	Action
30.	Complete the address information as applicable for the dependent by either: • Clicking the **Same Address as Employee** checkbox option or • Selecting the applicable **Address Type** using the dropdown button provided and then clicking the **Edit Address** button

The **Address** tab refreshes.

Step	Action
ℹ️	The address information auto-populates in the **Employee's Current Address** section.
31.	Click the **Personal Profile** tab.

Name	**Address**	Personal Profile

The **Personal Profile** tab displays.

Dependent/Beneficiary			

Help

Name	Address	Personal Profile

Person ID

Personal Profile 🔍 | ◀ ◀ 1 of 1 ▾ ▶ ▶| | View All

➕ ➖

Dependent/Beneficiary ID 01   Matthew Smith

*Date of Birth 📅   Birth Location
Birth Country 🔍   Birth State 🔍
Date of Death 📅   ☐ Riders/Orders exist
Medicare Entitled Date 📅   Riders/Orders

Personal History 🔍 | ◀ ◀ 1 of 1 ▾ ▶ ▶| | View All

➕ ➖

*Effective Date 01/01/2024 📅
*Relationship to Employee ▾
*Dependent Beneficiary Type ▾
*Gender Unknown ▾
*Marital Status Single ▾   As of 📅
☐ Student   As of 📅
☐ Disabled   As of 📅
☐ Smoker   As of 📅

ℹ️	The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided, 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).
32.	Click the **Date of Birth Calendar** icon and select the dependent's date of birth ("9/10/2013" in this scenario).

*Date of Birth 📅

Step	Action
33.	Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee ("Child" in this scenario). *Relationship to Employee [▾]
34.	Click the **Dependent Beneficiary Type** dropdown button and select "Approved Dependent". *Dependent Beneficiary Type [▾]
35.	Click the **Gender** dropdown button and select the dependent's gender ("Unknown", "Male", or "Female") ("Male" in this scenario). *Gender [Unknown ▾]
36.	The **Marital Status** field defaults to "Single". *Marital Status [Single ▾]
37.	Click the vertical scrollbar to scroll down on the page to the **National ID** section.
38.	Enter the dependent's Social Security Number (SSN) in the **National ID** field. ▾ National ID [📋][🔍] ⏮ ◀ 1-1 of 1 ▾ ▶ ⏭ | View All *Country / *National ID Type / Description / National ID / Primary ID USA 🔍 / PR 🔍 / Social Security Number / [ ] / ☑ / [+] [−]
39.	Scroll back up to the top of the page.
40.	Click the **Riders/Orders** link. Riders/Orders

Step	Action
	The **Dependent/Beneficiary Riders** page displays in a pop-up window.

Dependent/Beneficiary Riders

Employee ID   Dependent/Beneficiary ID 01

Riders/Orders   Q | |◀ ◀ 1 of 1 ▾ ▶ ▶| | View All

*Plan Type [Q]   *Sequence [   ]   + −
*Start Date [📅]   End Date [📅]
State [Q]   Status ● Active ○ Inactive
Exception Type [Court Order ▾]   Court Order Number [   ]
Comment [   ]

[OK] [Cancel]

Step	Action
41.	Click the **Plan Type Look Up** icon and select the applicable plan type ("Medical" in this scenario as the employee is currently enrolled in a Medical + Expanded Dental, Vision and Hearing plan). *Plan Type [Q]
42.	Enter "1" in the **Sequence** field. *Sequence [ ]
43.	Click the **Start Date Calendar** icon and select the applicable start date based on the dates provided in the NMSN ("01/01/2024" in this scenario). *Start Date [12/03/2023 📅]
44.	Click the **End Date Calendar** icon and select the applicable end date if an end date is provided in the NMSN ("9/10/2031" in this scenario). End Date [09/10/2031 📅]
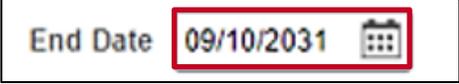
Step	Action
45.	Click the **State Look Up** icon and select the applicable State that issued the NMSN (North Carolina in this scenario).
	State NC 🔍 North Carolina
46.	Verify that the **Active** radio button option is selected.
	Status ⦿ Active ○ Inactive
47.	The **Exception Type** field defaults to "Court Order". Do not update.
	Exception Type Court Order ⌄
48.	Enter the NMSN Number in the **Court Order Number** field ("ACRNC123" in this scenario).
	Court Order Number ACRNC123
49.	Enter comments in the **Comment** field to include the date the NMSN was received and the address and contact information for the issuing entity.
	Comment NMSN Received on 12/5/2023 Onslow County Courthouse, Jacksonville, NC (910) 999-9999
50.	Click the **OK** button.
	OK Cancel

Step	Action

The **Personal Profile** tab redisplays.

51.	Verify that the **Riders/Order exist** checkbox option is selected (read-only).
	Riders/Orders exist

52.	Scroll down to the bottom of the page and click the **OK** button.
	OK Cancel Apply

Step	Action

The **Dependents / Beneficiaries** tab redisplays.

53.	Review the **Dependent/Beneficiaries Currently on Record** section and verify that the child dependent(s) on the NMSN is displayed.
54.	Repeat Steps 23 – 53 for any additional child dependents that need to be added and marked as NMSN Riders.
55.	Next, update the employee's coverage code selection and enroll the child dependent(s). Click the **Option Election** tab.

Step	Action

The **Option Election** tab redisplays.

56.	Select the applicable Medical Plan and coverage code. Click the **Option Code Look Up** icon (magnifying glass) within the **Plan Type 10: Medical** section.

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

31	Option	ACC1	3
29	Option	ACC1	1
34	Option	ACC2	2
33	Option	ACC2	1
35	Option	ACC2	3
36	Option	ACC2	4
37	Option	ACC3	1
39	Option	ACC3	3
38	Option	ACC3	2
40	Option	ACC3	4
41	Option	ACC4	1
44	Option	ACC4	4
43	Option	ACC4	3
42	Option	ACC4	2
46	Option	ACC5	2

Step	Action
57.	Select the same Benefit Plan that the employee is currently enrolled in but with the new Coverage Code by clicking the corresponding link in the **Option Code** column (Benefit Plan **Scenario**: ACC4 with Coverage Code 3 is selected. | 43	Option	ACC4	3	

Step	Action
	The **Option Election** tab redisplays.

The **Option Election** tab redisplays.

Step	Action
58.	Next, enroll the dependent(s) in the selected Medical Plan by either: • Clicking the **Enroll All** button if all dependents will be enrolled (applicable for this example) or • 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 (**+...**)

Step	Action
The page refreshes.	

Step	Action
59.	Scroll down to the bottom of the page and click the **OK** button. OK Cancel Apply

Step	Action

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

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

| 60. | 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. |

Step	Action
61.	A **Confirmation** message displays in a pop-up window once the process completes. Click the **OK** button. Process completed successfully. (3000,530) [OK]
	The **On-Demand Event Maintenance** page redisplays.
(i)	The **Status** field will now display as "Finalized-Enrolled". The **Event Status** field will still display as "Closed to Processing".
62.	Click the **Save** button.

Step	Action
ⓘ	This process is now complete. Refer to the <u>Viewing the Employee's Benefit Information</u> section of this Job Aid to validate accuracy. Refer to the <u>Viewing/Printing a Confirmation Statement</u> if you need to print the Confirmation Statement for the employee.

Processing a DSS/National Medical Support Order to Remove Event

This section of the Job Aid should be referenced when you are creating and processing a Processing a DSS/National Medical Support Order to Remove Event.

The steps included in this section of the Job Aid are based on the following example scenario:

Scenario: A NMSN was received for an employee on 12/12/2023 from a Virginia Court. The effective date of the NMSN is 12/10/2023. You have already validated the NMSN and verified that the employee is still employed by the Agency and being paid. This NMSN is releasing the mandated coverage for the named child dependent. The employee is currently enrolled in a "Family" plan and the named dependent is currently covered. The court has deemed that this child dependent is not the employee's biological child and the child will be removed from coverage.

Note: Generally speaking, the steps in this Job Aid can be used to create and process any DSS/National Medical Support Order to Remove event. Be sure to use the actual dates and information from the NMSN when completing this process in Production.

Step	Action
1.	First, the Benefit Event must be created. Access the **Benefit Event Entry** page using the following navigation path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > Benefit Event**

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

Step	Action
(i)	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. Search by: Empl ID begins with [ ]
3.	Click the **Search** button. [Search] [Clear]

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

Step	Action
4.	Refer to the Processing a DSS/National Medical Support Order to Enroll Event (Dependent(s) not already in Cardinal) section of this Job Aid and complete Steps 4 - 13. For Step 5, select "DSS/National Medical Support Order to Release". Life Event [DSS/National Medical Support Order to Release ⌄]
5.	The manual Benefit Event DSS/National Medical Support Order to Release Event (MSR) is now created. Next, this event must be processed. Access the **On-Demand Event Maintenance** page using the following navigation path: **NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance**

Step	Action

The **On-Demand Event Maintenance 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**.
6.	Enter the employee's Employee ID in the **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
7.	Click the **Search** button.
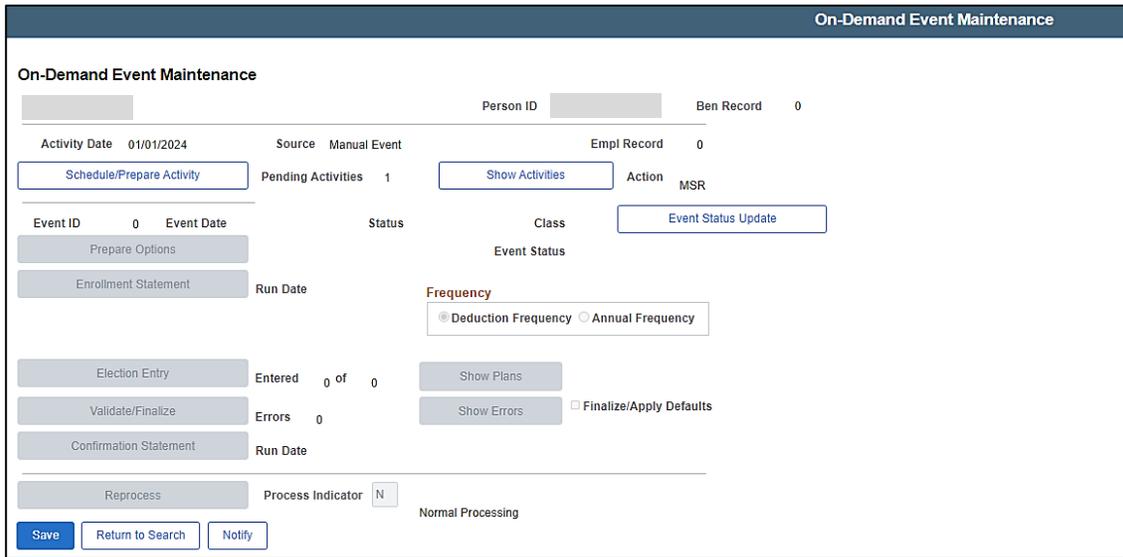
Step	Action
	The **On-Demand Event Maintenance** page displays for the applicable employee.
8.	Review the **Activity Date** field. For DSS/National Medical Support Events, this date will be auto-populated based on the Life Event date previously entered. **Scenario**: The effective date is 1/1/2024. Ensure that this date is accurate.
(i)	The **Source** field will be "Manual Event". The **Action** field will default to "MSR".
9.	Click the **Show Activities** button **Only** if there is more than one activity.

Step	Action
10.	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 13. Since the **Pending Activities** field displays a "1", click the **Schedule/Prepare Activity** button.
(i)	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.
11.	A **Confirmation** message displays in a pop-up window once the automated program completes.
	Click the **OK** button.

The **On-Demand Event Maintenance** page redisplays.
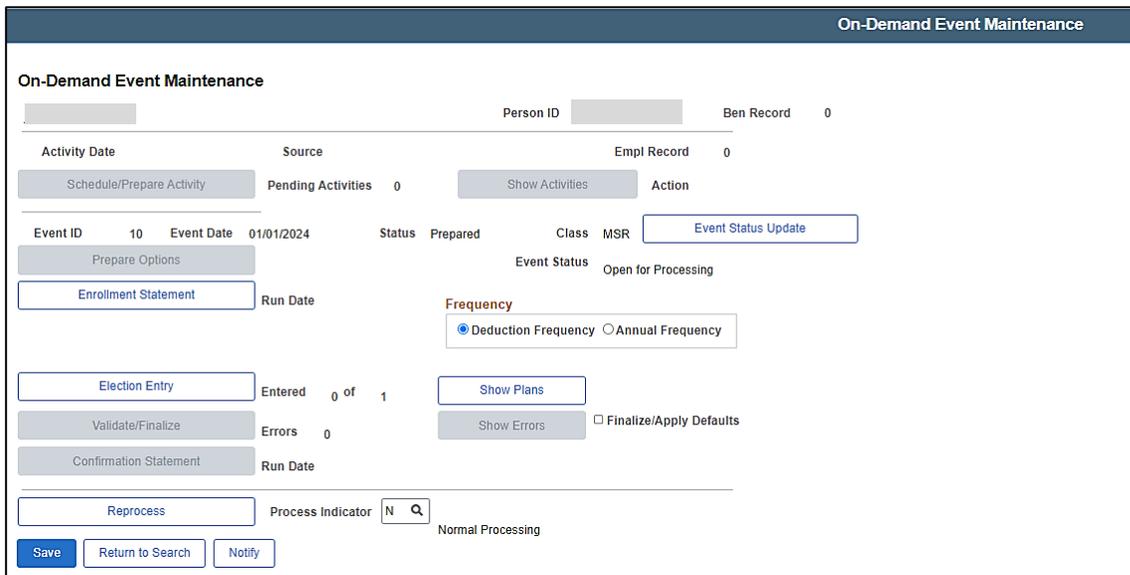
Step	Action
12.	Confirm that the **Status** field displays as "Prepared" and the **Event Status** field displays as "Open for Processing".
13.	Click the **Election Entry** button.

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

Step	Action
14.	First, update the NMSN Rider information for the named child dependent. Click the **Dependents / Beneficiaries** tab. [Event / Participant Selection] [Option Election] [Dependents / Beneficiaries]

The **Dependent / Beneficiaries** tab displays.

Step	Action
15.	Review the **Dependent/Beneficiaries Currently on Record** section and verify that the child dependent(s) on the NMSN is displayed.
16.	Click the **Change/Add Dependent Data** link. Change/Add Dependent Data

Step	Action

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

Step	Action
17.	Review the **Display Name** field and ensure that you are on the record for the applicable child dependent. Use the navigation arrows or the **View All** link within the **Dependent/Beneficiaries** section as needed to locate the applicable child dependent.
18.	Click the **Personal Profile** tab.

Step	Action
The **Personal Profile** tab displays.	
19.	Verify that the correct child dependent is displayed and then click the **Riders/Orders** link. Riders/Orders

Step	Action
	The **Dependent/Beneficiary Riders** page displays in a pop-up window. **Dependent/Beneficiary Riders** ✕ Help Employee ID ▢▢▢▢▢ Dependent/Beneficiary ID 01 Riders/Orders 🔍 I ◄ ◄ 1 of 1 ▾ ► ►I I View All ➕ ➖ *Plan Type 10 🔍 Medical *Sequence 1 *Start Date 06/01/2023 📅 End Date 06/01/2028 📅 State VA 🔍 Virginia Status ◉ Active ○ Inactive Exception Type Court Order ▾ Court Order Number ACRVA123 Comment NMSN Received on 6/1/2023 from Henrico County Courthouse OK Cancel
20.	Click the **End Date Calendar** icon and select the date of the NMSN Release ("12/10/2023" in this scenario). End Date 06/01/2028 📅
21.	Click the **Inactive** radio button option. Status ◉ Active ○ Inactive
22.	Enter applicable comments pertaining to the NMSN in the **Comment** field. Do not overwrite the previous comments. Comment NMSN Received on 6/1/2023 from Henrico County Courthouse
23.	Click the **OK** button once complete. OK Cancel
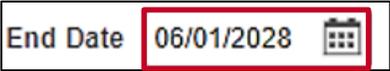
Step	Action
	The **Personal Profile** tab redisplays.

| 24. | Verify that the **Riders/Order exist** checkbox option is not selected (read-only). |
| | ☐ **Riders/Orders exist** |

| 25. | Scroll down to the bottom of the page and click the **OK** button. |
| | **OK**   Cancel   Apply |

Step	Action

The **Dependents / Beneficiaries** tab redisplays.
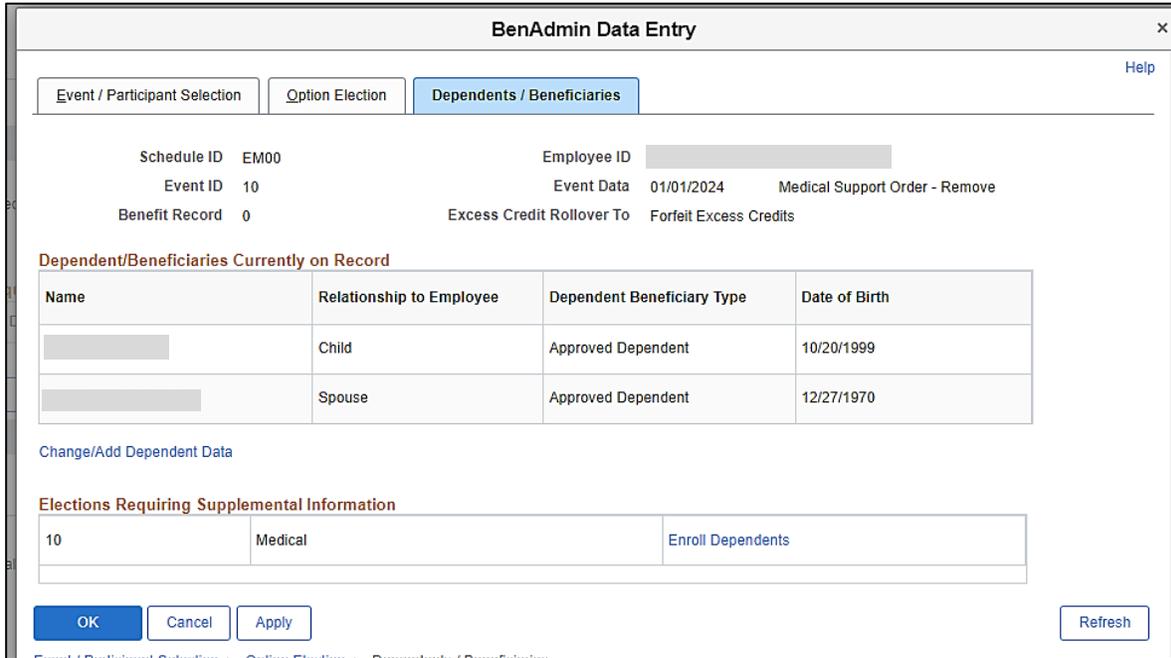
BenAdmin Data Entry

Help

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Schedule ID	EM00	Employee ID
Event ID	10	Event Data 01/01/2024 Medical Support Order - Remove
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
	Child	Approved Dependent	10/20/1999
	Spouse	Approved Dependent	12/27/1970

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents

OK | Cancel | Apply | Refresh

| 26. | Click the **Option Election** tab. |

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

Step	Action
	The **Option Election** tab redisplays.

Step	Action
27.	Next, update the employee's elected Medical Plan and coverage code as needed. **Scenario**: The child dependent will be removed from coverage. Therefore, the coverage code needs to be updated. Click the **Option Code Look Up** icon and select the applicable coverage code ("Self + Spouse" in this scenario).
ⓘ	If the coverage code does not need to be updated, skip to Step 29.
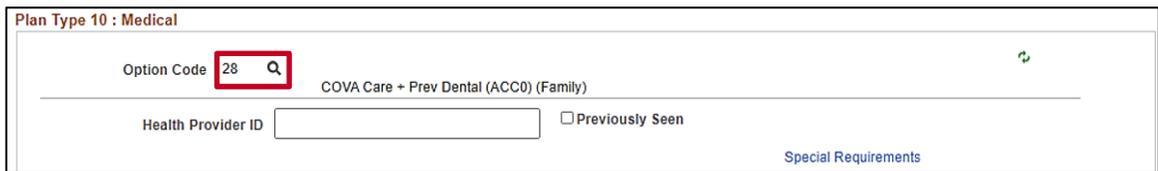
Step	Action
28.	If the child dependent is being removed from coverage, click the corresponding **Delete Row** icon (-).
ℹ	If the dependent is not being removed from coverage, skip to Step 31.
	A **Warning** message displays in a pop-up window. Delete current/selected rows from this page? The delete will occur when the transaction is saved.
29.	Click the **OK** button.

Step	Action
	The **Option Election** tab redisplays.

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

30.	Scroll down to the bottom of the page and click the **OK** button.

Step	Action
	The **On-Demand Event Maintenance** page redisplays.
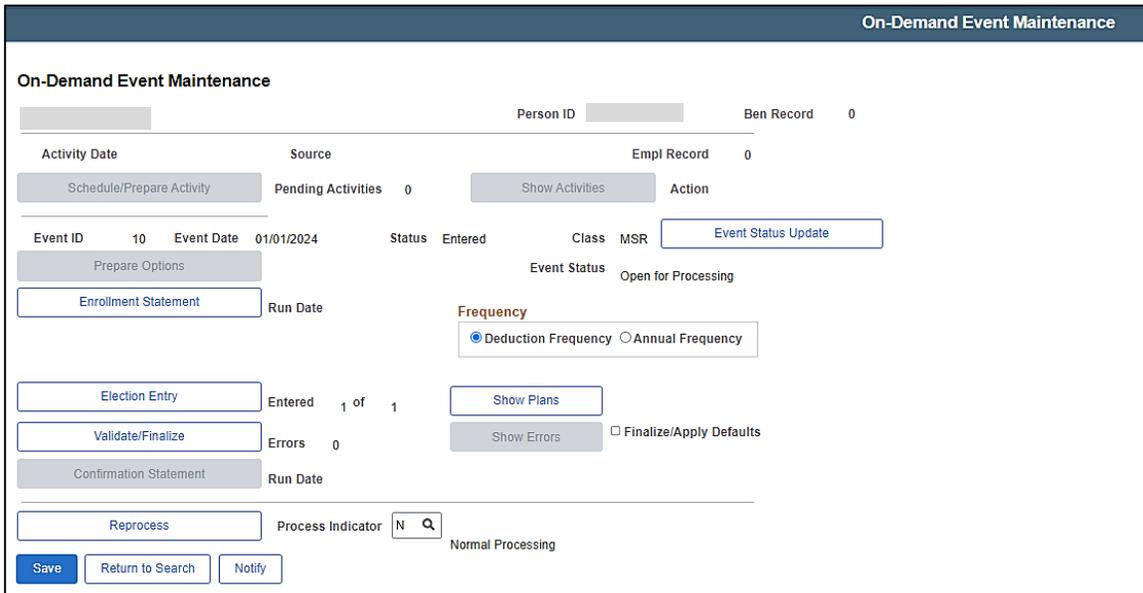
(i)	The **Status** field will now display as "Entered". The **Event Status** field will still display as "Open for Processing".

| 31. | 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. |

Step	Action
32.	A **Confirmation** message displays in a pop-up window once the process completes. Click the **OK** button.

Process completed successfully. (3000,530)

OK

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

On-Demand Event Maintenance

Person ID   Ben Record   0

Activity Date	Source	Empl Record 0

Schedule/Prepare Activity   Pending Activities   0   Show Activities   Action

Event ID   10   Event Date   01/01/2024   Status   Finalized - Enrolled   Class   MSR   Event Status Update

Prepare Options   Event Status   Closed to Processing

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

ℹ	The **Status** field will now display as "Finalized-Enrolled". The **Event Status** field will still display as "Closed to Processing".

Activity Date	Source	Empl Record 0

Schedule/Prepare Activity   Pending Activities   0   Show Activities   Action

Event ID   10   Event Date   01/01/2024   Status   Finalized - Enrolled   Class   MSR   Event Status Update

Prepare Options   Event Status   Closed to Processing

Step	Action
33.	Click the **Save** button. This process is now complete.

Processing QMCSO Information

For a **Qualified Medical Child Support Order (QMCSO)** that is received from the Agency, select the "Judgment, Decree or Order to Add Child or Judgment" or "Decree or Order to Remove Child" on the **Benefit Event Entry** page. A Medical Support Order - Add (MSA) or Medical Support Order – Remove (MSR) event would be created.

Follow all steps in the above scenarios to create and process the event. It is not required that the Rider information be completed on the **Dependents/Beneficiaries** tab.

Refer to the Viewing the Employee's Benefit Information section of this Job Aid to validate accuracy. Refer to the Viewing/Printing a Confirmation Statement if you need to print the Confirmation Statement for the employee or the NMSN Issuing Entity.

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.	Access the **Current Benefits Summary** page using the following navigation path: **NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary**

The **Current Benefits Summary Find an Existing Value** page displays.

ℹ️	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 **Empl ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.

Step	Action
3.	Click the **Search** button.

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

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

Current Enrollments

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin	
Medical	Elect	ACC4	COVA EVH	Family	07/01/2022	
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	05/25/2019	
403(b)	Waive			Waived	10/01/2022	
Section 457	Waive			Waived	10/01/2022	
VRS Hb Vol Defined Contr	Elect	HVC050	HVC050	0.5% Before 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	HBDBER	HBDBER	0% of Earnings	09/25/2022	
Group Term Life	Elect	GTLR	GTL Reg	0% of Earnings	09/25/2022	

Step	Action
ℹ️	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**.
5.	Click the **Benefit Deduction Summary** tab.

Benefit Enrollment Summary	**Benefit Deduction Summary**

The **Benefit Deduction Summary** tab displays.

Step	Action
6.	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.

Payroll System Payroll for North America
Pay Group SM1 Semimonthly Class (SUNSAT07)
Payroll Status Active

Latest Deductions

Plan Type	Benefit Plan	Dedn Code	Description	Class	Coverage Base	Last Deduction	Pay Period End
10	ACC4	CVACRE	COVACARE	Before-Tax		220.00	10/24/2022
				Nontaxable Benefit		929.50	10/24/2022
23	IMPLIF	IMPLIF	Imp Life	Taxable Benefit	164000.00	26.22	10/09/2022
4W	HVC050	HYBVDC	HYB VDC	Before-Tax		17.06	10/24/2022
				Nontaxable Btax Benefit		17.06	10/24/2022
70	HVRMDB	HVRMDB	HVRMDB	Before-Tax	3412.50	136.50	10/24/2022
				Nontaxable Benefit	3412.50	459.32	10/24/2022
7V	HBDBER	HBDBER	HYB Rtmt	Nontaxable Benefit	442.26	442.26	10/24/2022
7W	GTLR	GRPLFR	Grp Life	Nontaxable Benefit	3412.50	45.73	10/24/2022
7X	RTCRDR	RETHCR	Ret Hlth	Nontaxable Benefit	3412.50	38.22	10/24/2022

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.	Access the **Current Benefits Summary** page using the following navigation 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 **Employee ID** field. **Note**: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.
3.	Click the **Search** button.

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

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

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

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

Step	Action

The page refreshes.

Benefits Administrator	

Environmental Specialist I
Return to Select Employee

Review Employee Statements

Statement Type: Confirmation Statement

2 rows

Event Date	Issue Date	Seq	Enrollment Event	Statement Type	
07/01/2022	06/01/2022 10:08:19PM	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 **Scenario**: Open Enrollment May 2022 COVA (Seq Number 2) will be opened

Event Date	Issue Date	Seq	Enrollment Event	Statement Type	
07/01/2022	06/01/2022 10:08:19PM	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	>

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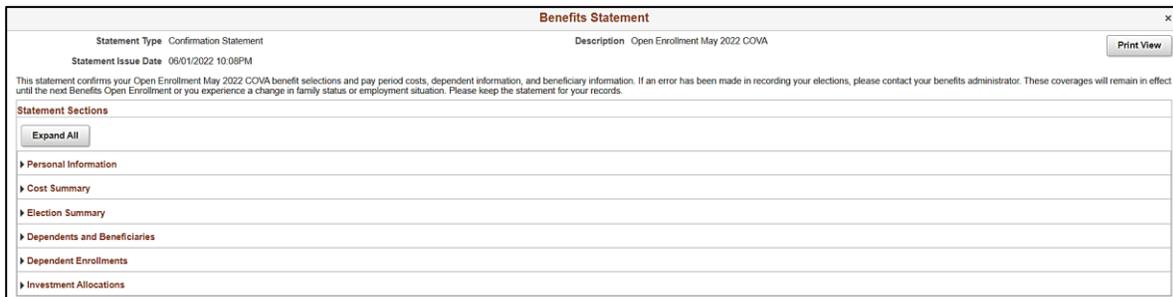
Benefits Statement

Statement Type Confirmation Statement

Description Open Enrollment May 2022 COVA

Print View

Statement Issue Date 06/01/2022 10:08PM

This statement confirms your Open Enrollment May 2022 COVA benefit selections and pay period costs, dependent information, and beneficiary information. If an error has been made in recording your elections, please contact your benefits administrator. These coverages will remain in effect until the next Benefits Open Enrollment or you experience a change in family status or employment situation. Please keep the statement for your records.

Statement Sections

Expand All

▸ Personal Information
▸ Cost Summary
▸ Election Summary
▸ Dependents and Beneficiaries
▸ Dependent Enrollments
▸ Investment Allocations

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

Statement Sections

Expand All

Step	Action
	The page refreshes with the sections expanded.

The page refreshes with the sections expanded.
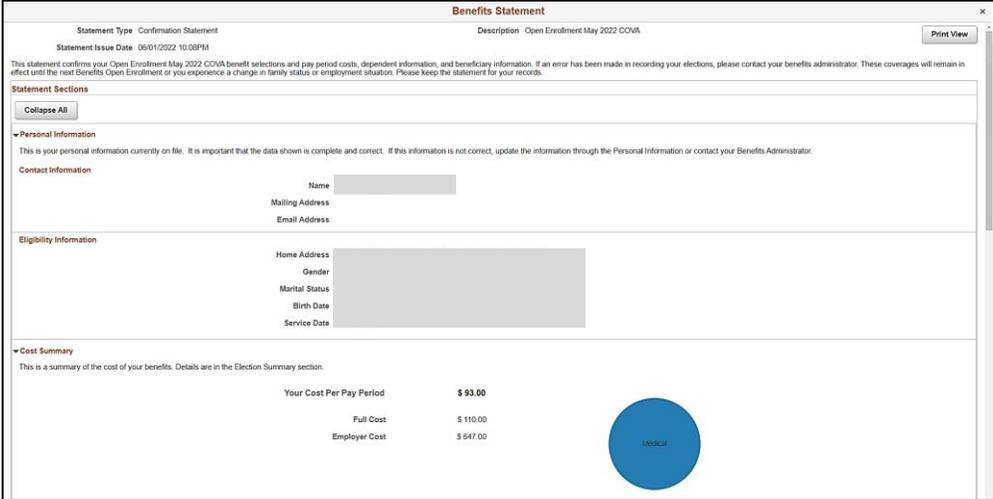
Step	Action
8.	Review the information as needed. Use the vertical scrollbar to scroll down and view all of the information.
9.	Click the **Print View** button. Print View
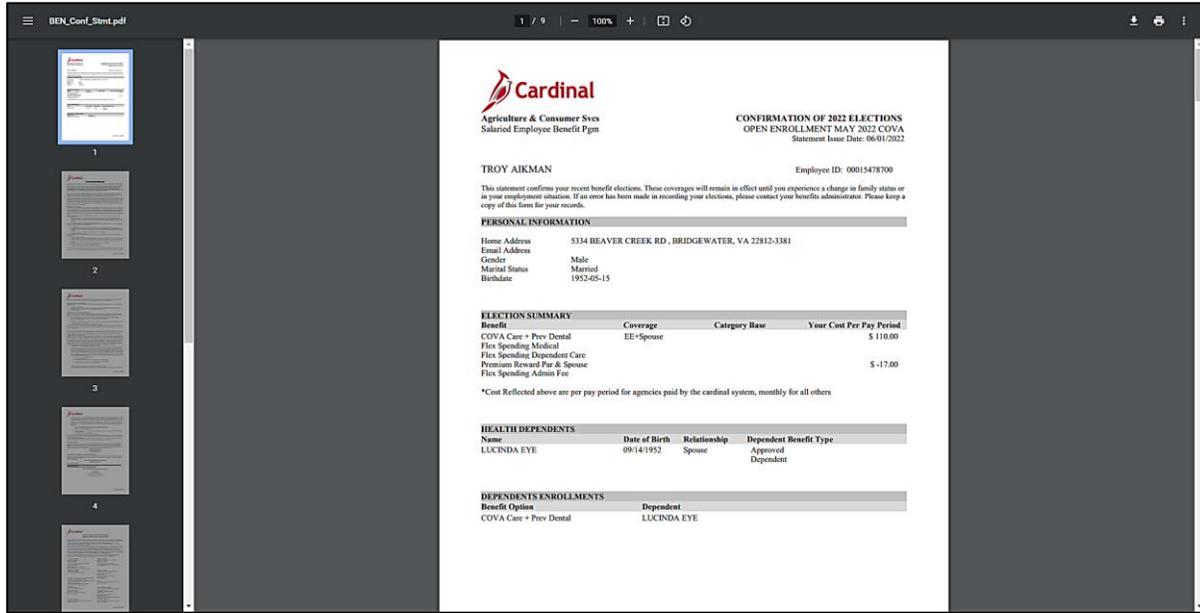
Step	Action
	The **Confirmation Statement** opens as a PDF document. If the Confirmation Statement does not display, you may need to allow pop-ups from the website.
10.	Save and/or print the document as needed.