Managing and Approving Dependents Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator to generate the Dependent Waiting Approval Benefits Eligibility Audit Report. This report should be generated and reviewed on a regular basis in order to monitor those dependents that are currently in an "Unapproved Dependent" status. Unapproved dependents are not covered under the employee's selected plan coverage and must be updated to a status of "Approved Dependent" once the applicable supporting documentation is provided by the employee. Use this report to review these dependents pending approval and to follow up with the employee to ensure that the supporting documentation is provided within the established timeframe.

This Job Aid also provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to re-open and reprocess a Benefit Event after the Benefit Event was validated and finalized. Re-opening a Benefit Event may be required in any of the following circumstances:

- Additional dependents need to be enrolled
- Additional enrollments need to be completed
- Updates or corrections to the enrollments or dependents information are needed
- Dependents need to be updated from "Unapproved Dependent" to "Approved Dependent" when the required supporting documentation is provided by the employee

Benefit Events should only be re-opened within their original enrollment window. Request permission from the Office of Health Benefits (OHB) prior to re-opening a Benefit Event outside of the original enrollment window.

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.

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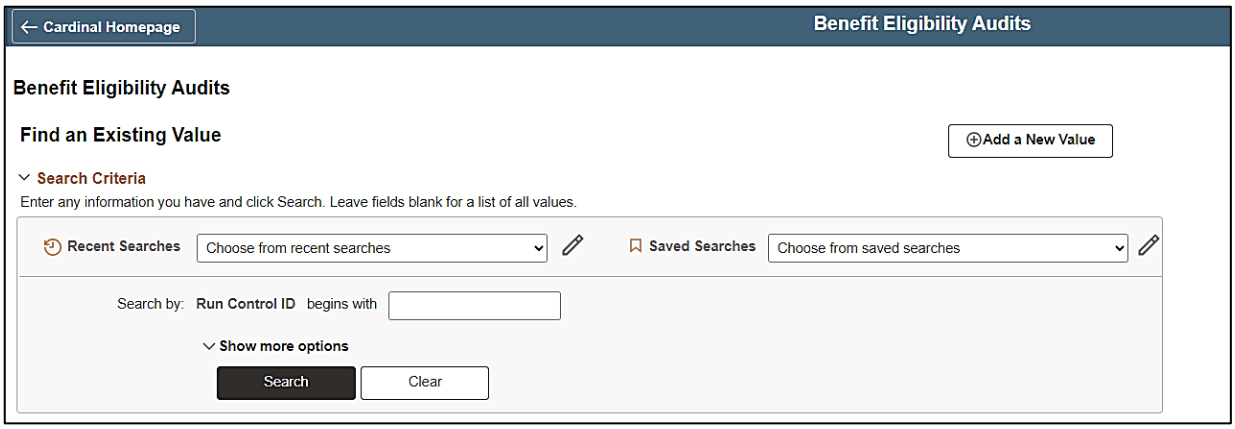
Revision History

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). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

Running the Dependent Waiting Approval Benefits Eligibility Audit Report

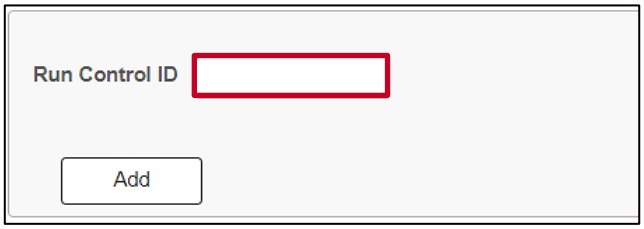
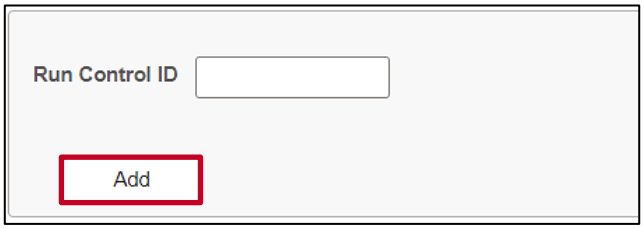
Step	Action
1.	Navigate to the (page or report) using the following path: **NavBar > Menu > Benefits > Reports > Audits > Benefit Eligibility Audits**

The **Benefit Eligibility Audits Search** page displays.

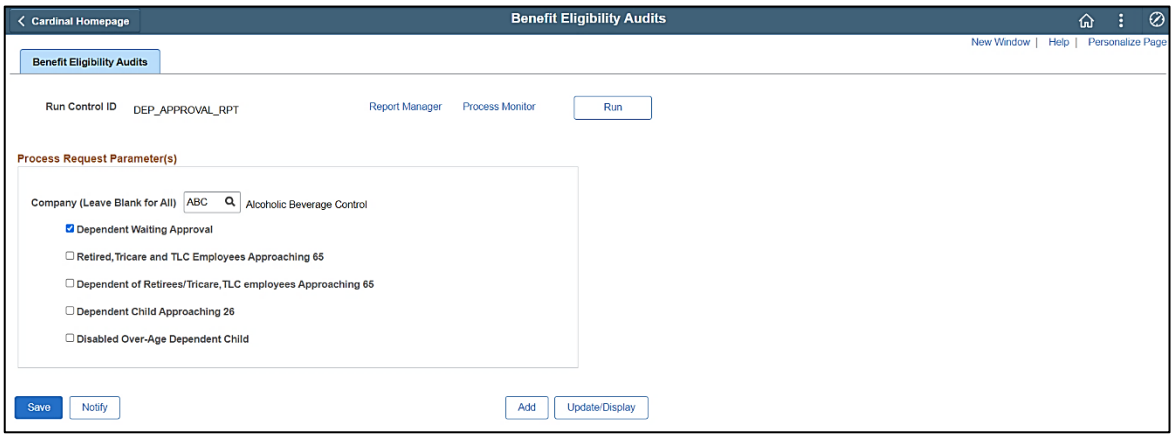


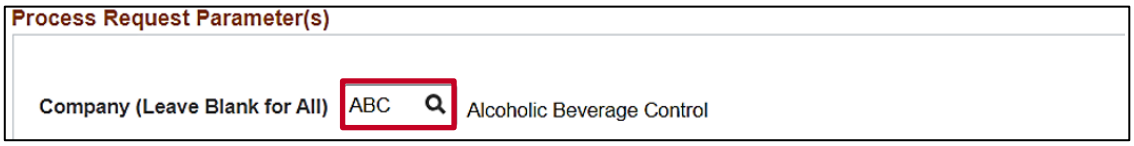
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.
	If this is not the first time generating this report, always search for and use an existing Run Control ID before creating a new one. Users cannot delete Run Control IDs once they are created and saved. The instructions provided in Steps 2-4 assume that this is the first time that this report is being generated.
2.	Click the **Add a New Value** button.

The **Add a New Value** page displays.

Step	Action
3.	Enter a Run Control ID in the **Run Control ID** field based on the following guidelines: a. The Run Control ID must be unique and should be descriptive enough to help locate for future use b. Up to 30 characters are allowed c. No blank spaces can be used; however, an underscore can be used in lieu of spaces d. Do not use wildcard symbols (%) 
4.	Click the **Add** button. 

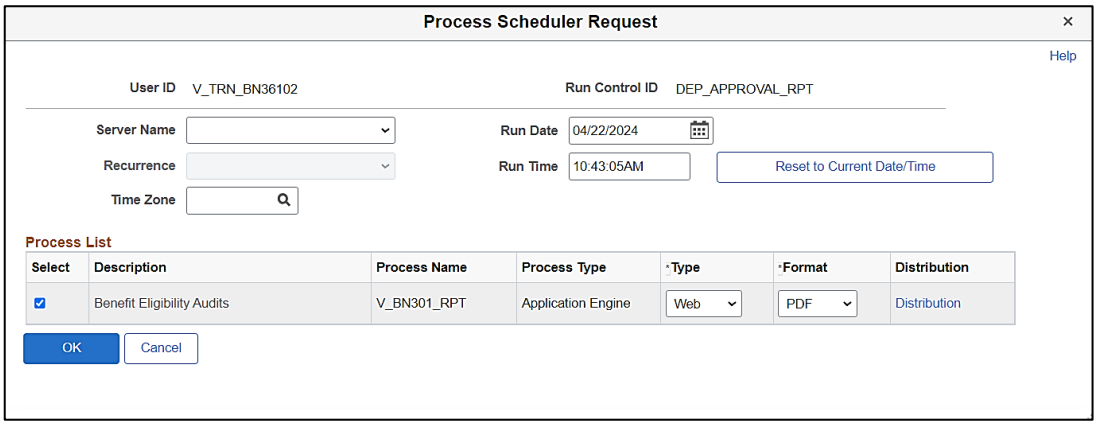
The **Benefits Eligibility Audits** page displays.

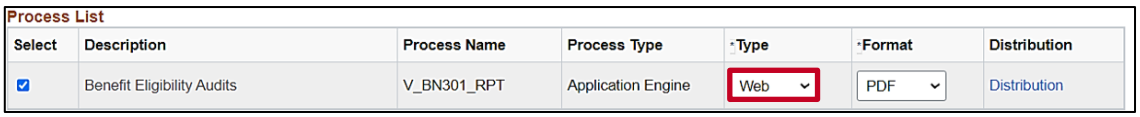


5.	Select the applicable Company using the **Company Look Up** icon. 

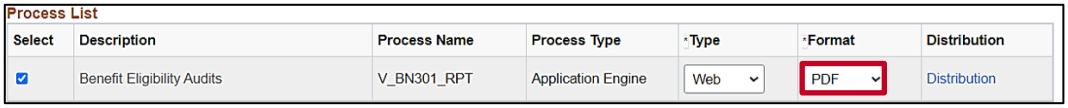
Step	Action
6.	Click the **Dependent Waiting Approval** checkbox option.
7.	Click the **Save** button.
8.	Click the **Run** button.

The **Process Scheduler Request** page displays.



9.	The **Type** field defaults to “Web”. Update to “Email”, “File”, or “Printer” as desired. If “Email” is selected, use the **Distribution** link to identify the email address to send the report. 

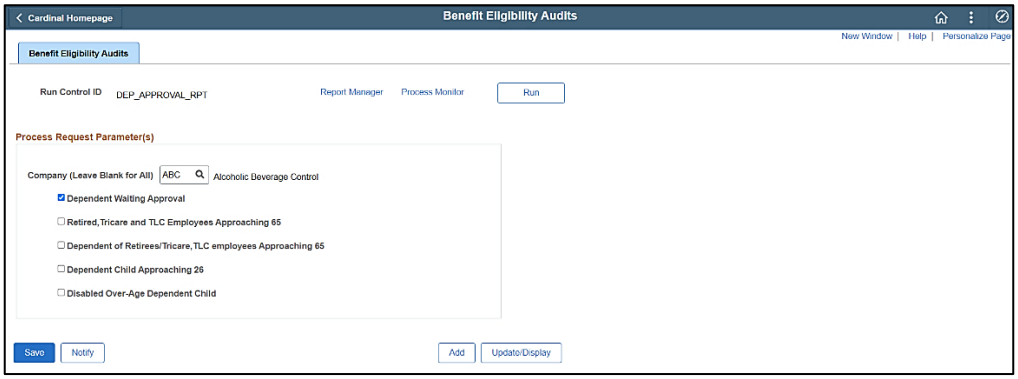
Step	Action
10.	The **Format** field defaults based on the report being generated. Update as needed if other formats are available for the report being generated.



Refer to the HCM Reports Catalogs to identify the formats available for each specific HCM Report. The HCM Reports Catalogs are located on the Cardinal website under **Resources.**

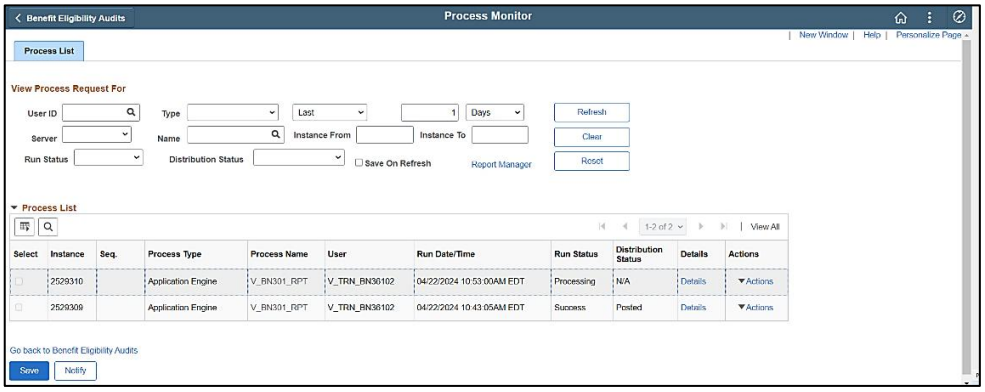
11. Click the **OK** button.

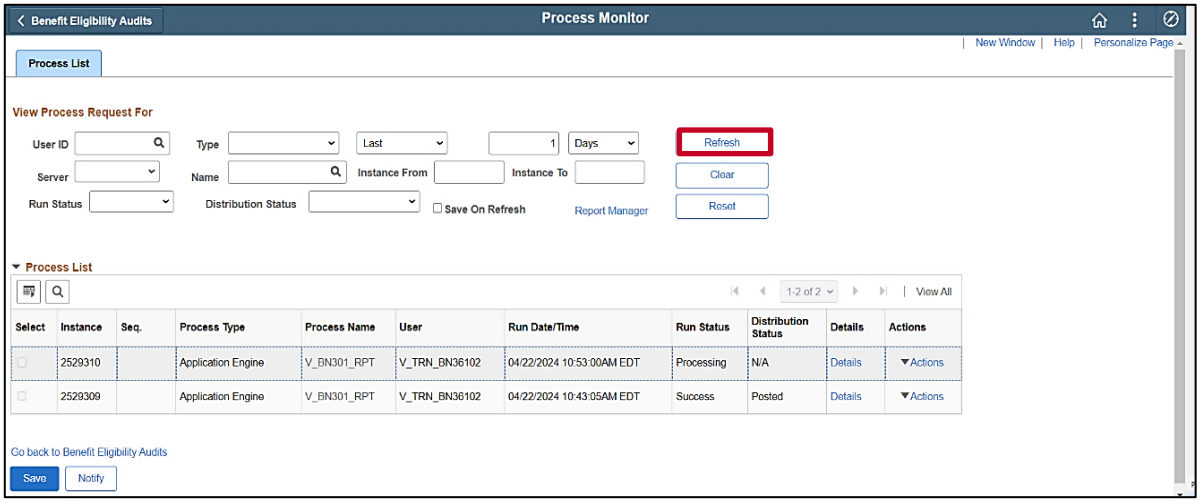
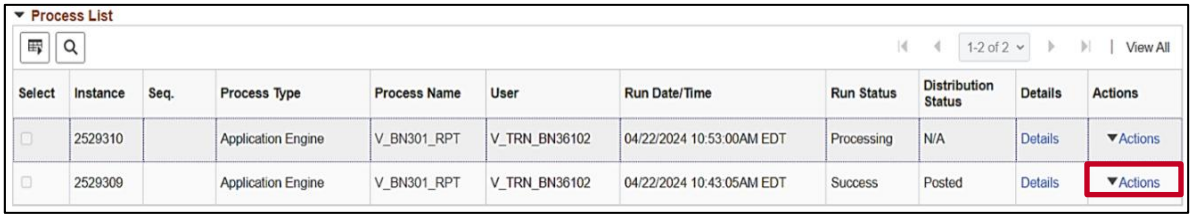
The **Benefit Eligibility Audits** page redisplays.



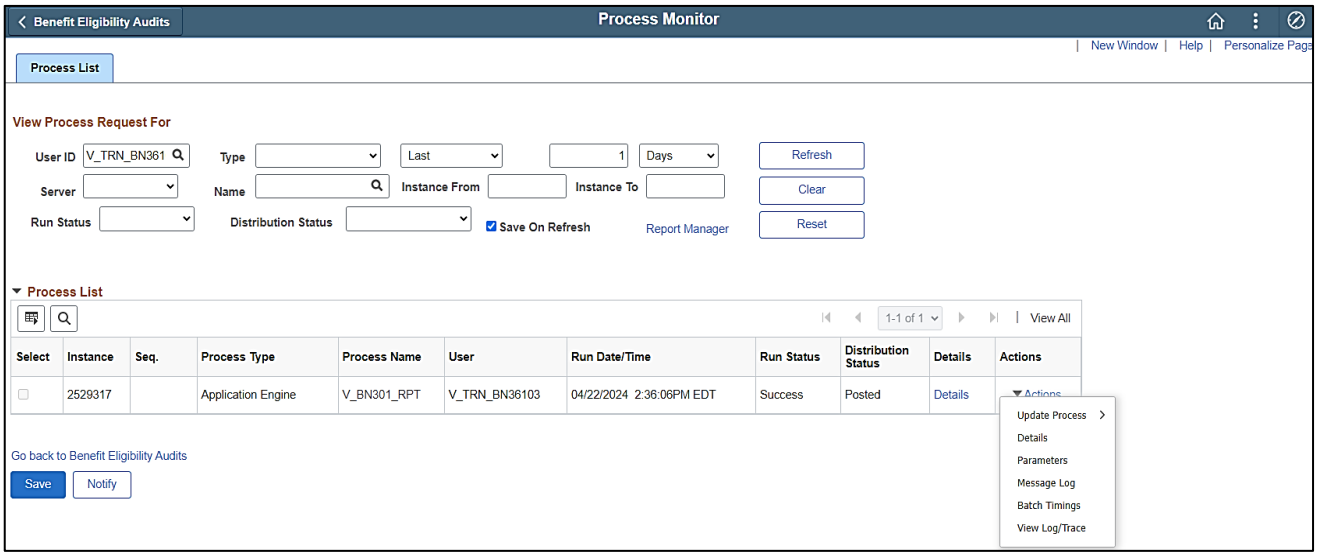
12. Click the **Process Monitor** link.

The **Process Monitor** page displays.

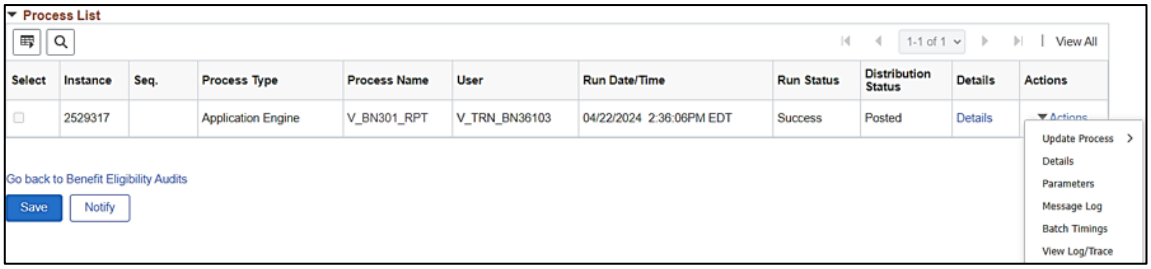


Step	Action
13.	Click the **Refresh** button periodically until the **Run Status** is “Success” and the **Distribution Status** is “Posted”. 
14.	Click the **Actions** dropdown button. 

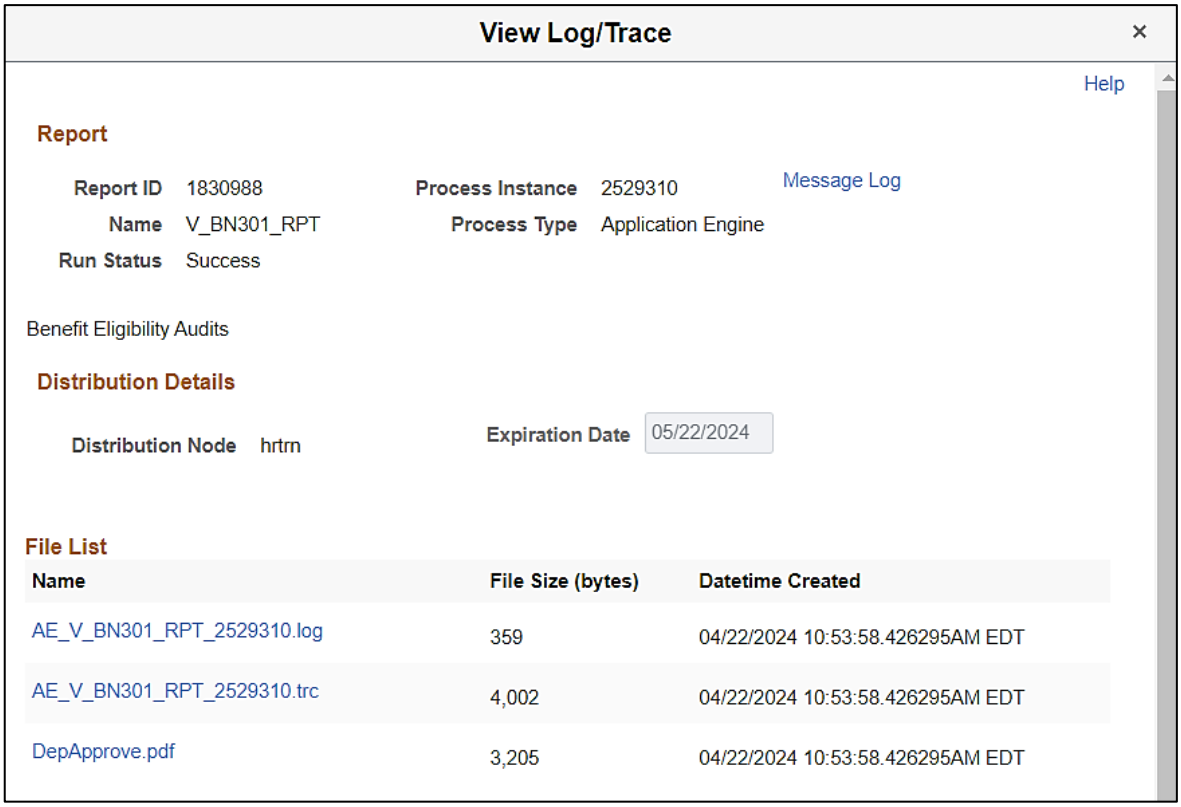
The **Actions** dropdown menu displays.



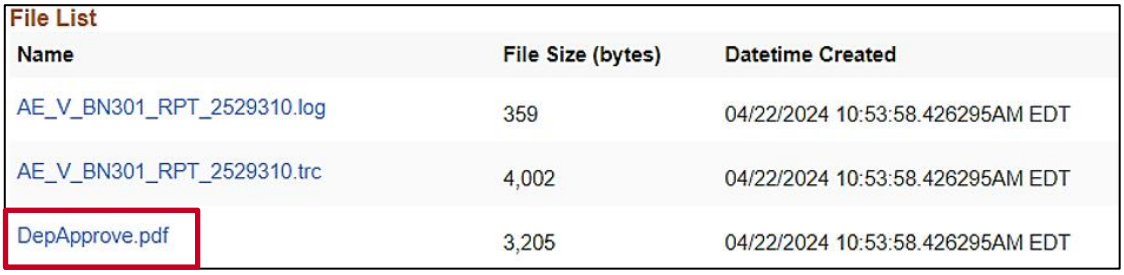
Step	Action
15.	Click the **View Log/Trace** list item.



The **View Log/Trace** page displays in a new window.



16.	Click the **DepApprove.pdf** link.



Step	Action
The **Dependent Waiting Approval Benefits Eligibility Audit** report displays.	

Dependent Waiting Approval

Company	Employee ID	Ben Record	Last Name	First Name	Middle Name	Depend/Be	Dep Last	Dep First	Dep Middle	DEP DOB	Relatio	Disable	Effective Date	Disabled As of Date	Medicare Date	Address 1	Address 2	City	State	Postal	Email Address	Email Type	Benefit Group	Unit	Dept ID	Audit Reason
ABC	00860033500	0	Snaps	Sugar		01	Snaps	Ginger		4/1/1999	SP	N	5/1/2024			200 Main Street		Richmond	VA	23219	noemail@virginia	BUSN	9990001000	99900	190705	Documentation Approval
ABC	00860033500	0	Snaps	Sugar		02	Snaps	Finger		4/12/2019	SC	N	5/1/2024			200 Main Street		Richmond	VA	23219	noemail@virginia	BUSN	9990001000	99900	190705	Documentation Approval

	Review this report to identify any dependents that are currently “Unapproved” and are pending approval when the applicable supporting documentation is received. Follow up with the employee(s) as needed to obtain the supporting documentation as dependents displayed on this report are not currently covered on the employee’s selected plan.

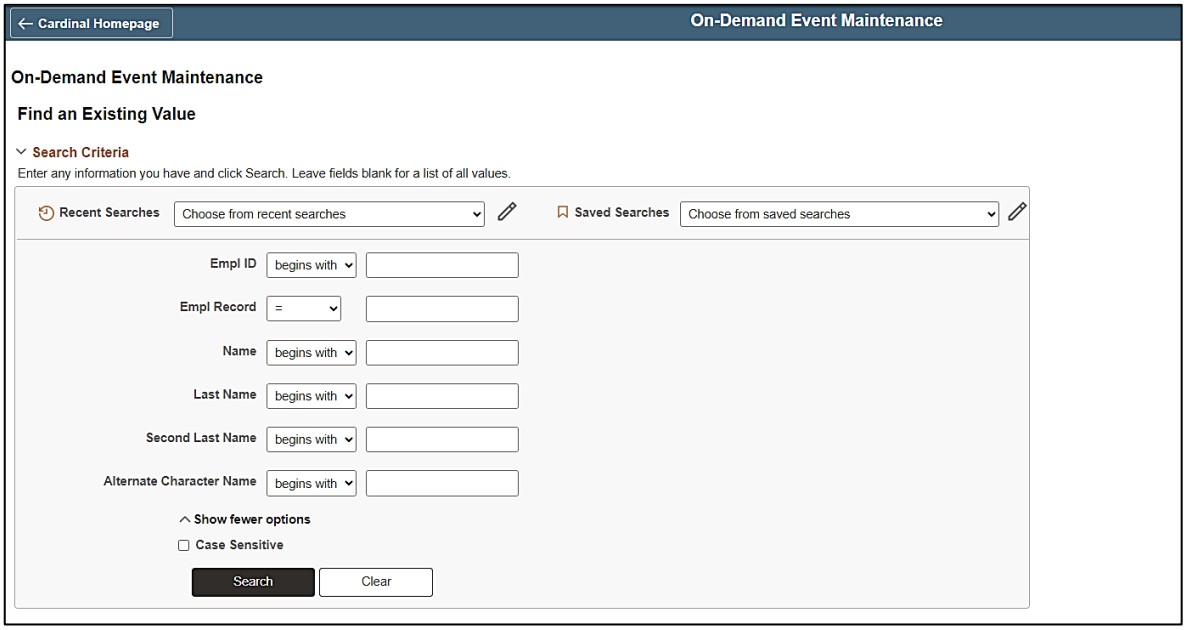
How to Approve a Dependent

Once the employee provides the applicable supporting documentation to add the dependent(s) to their plan coverage, the applicable Benefit Event will need to be re-opened and reprocessed in order to update the dependent(s) to a status of “Approved Dependent”. This Benefit Event could have been triggered by:

- A Life Event manually created by a Benefits Administrator
- A Life Event initiated by the employee through Employee Self-Service (ESS)
- An Open Enrollment Event including the addition of dependents to coverage

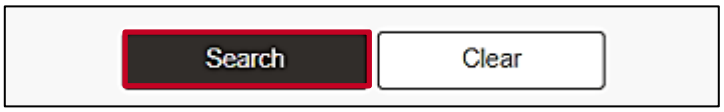
Step	Action
1.	Navigate to the **On-Demand-Event Maintenance** page using the following navigation path: **NavBar > Menu > Benefits > Managed Automated Enrollments > Events > On-Demand Event Maintenance**

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

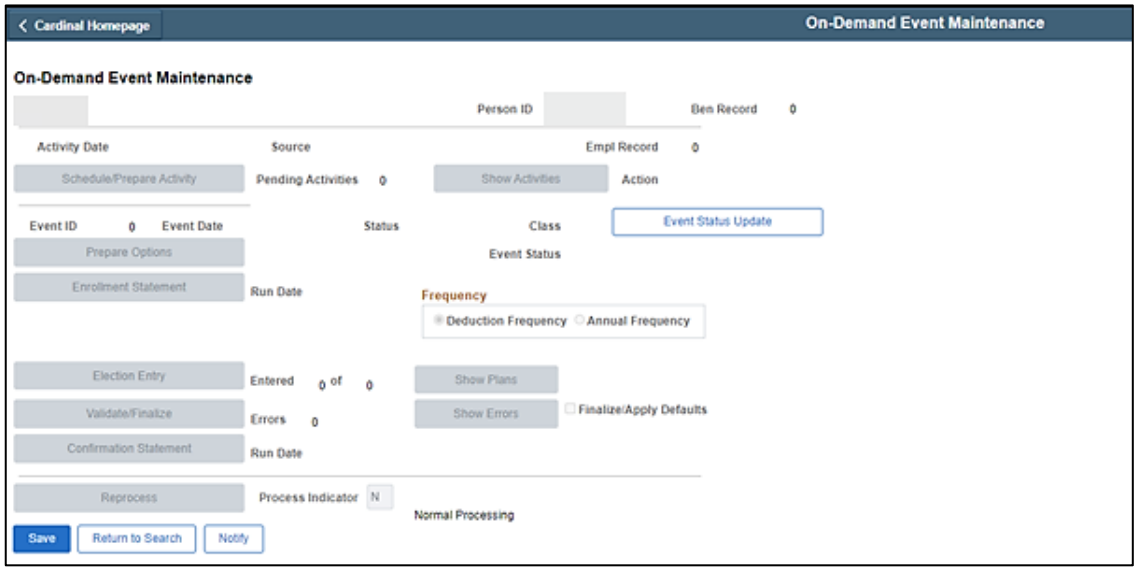


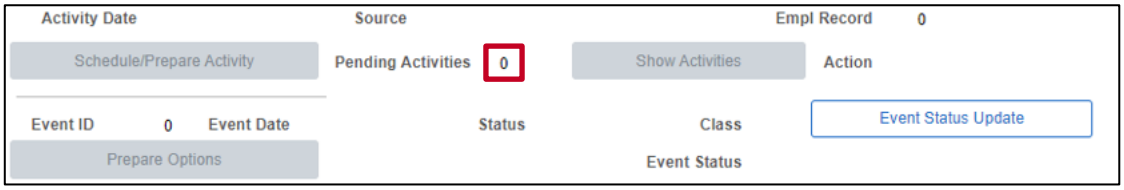
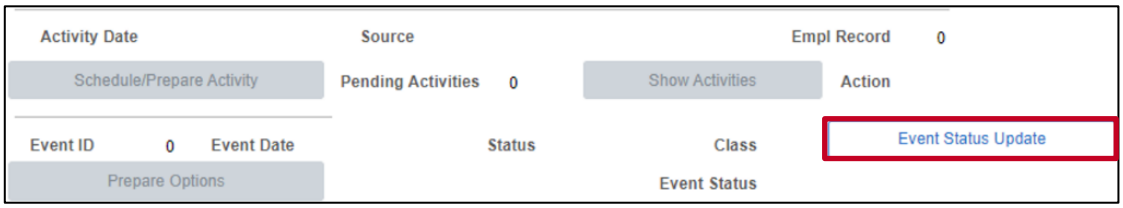
For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

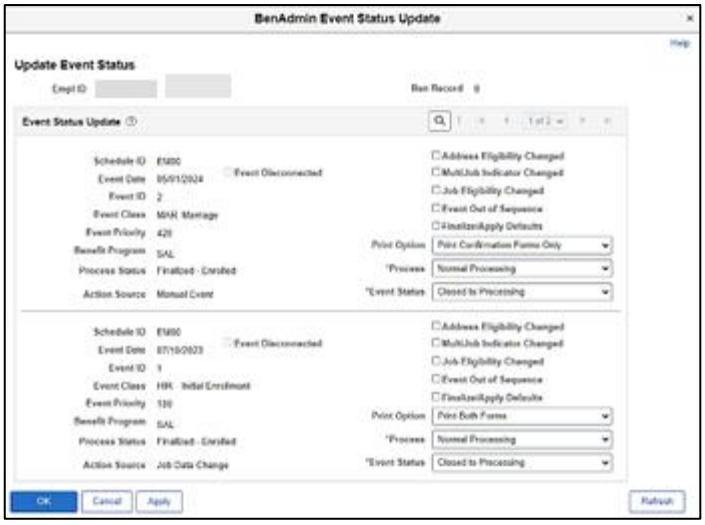
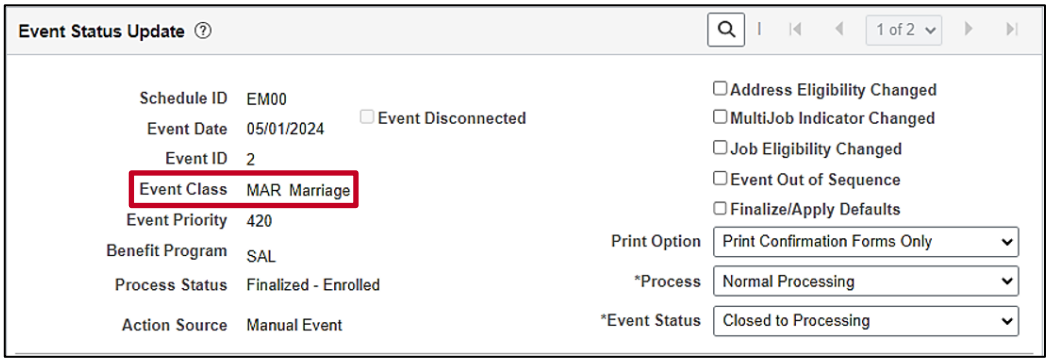
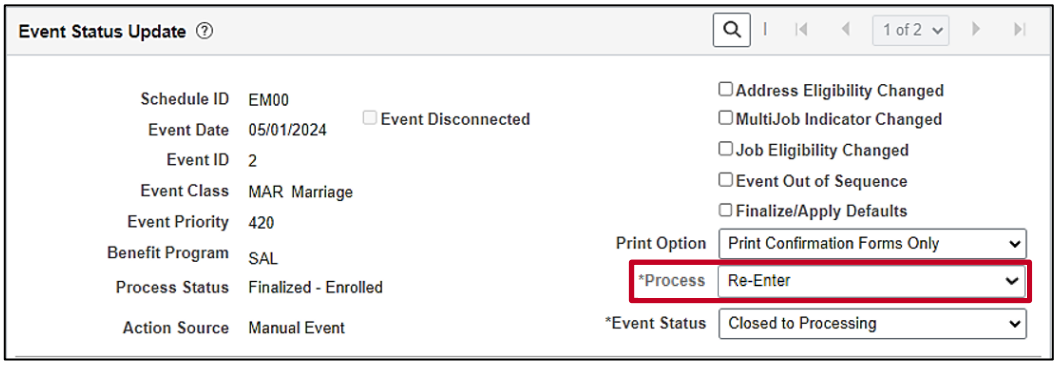
2. Enter the applicable employee’s Employee ID in the **Empl ID** field.

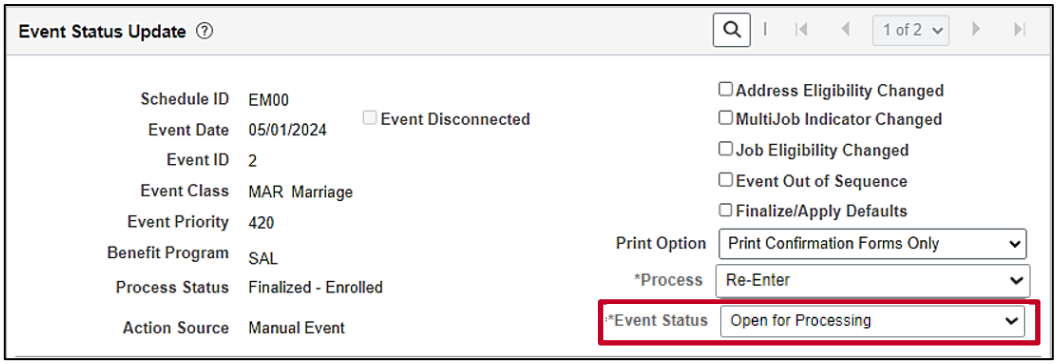
Step	Action
	Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.
3.	Click the **Search** button. 

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

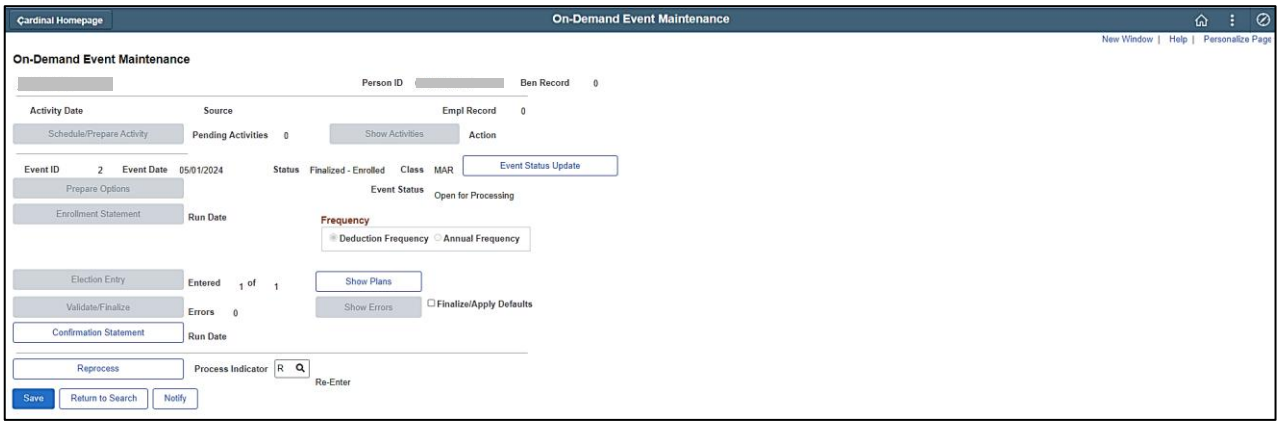


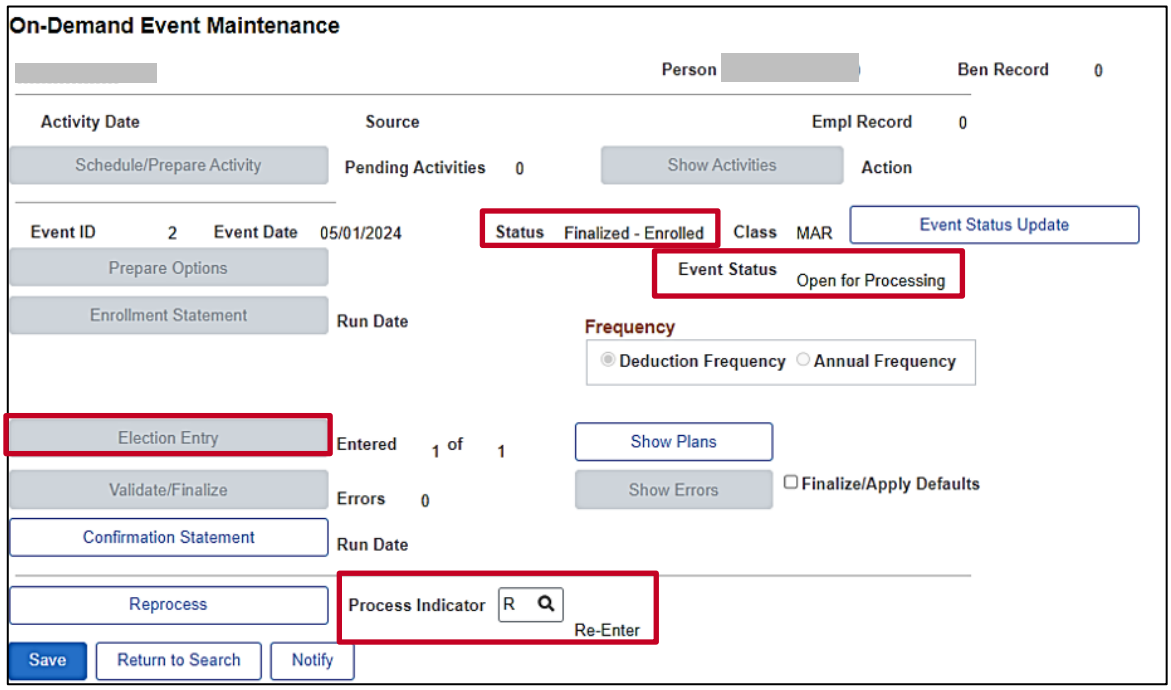
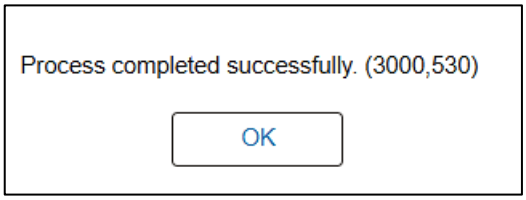
	The **Pending Activities** field displays a "0" as there are no Benefit Events for this employee that are open for processing. 
4.	Click the **Event Status Update** button. 

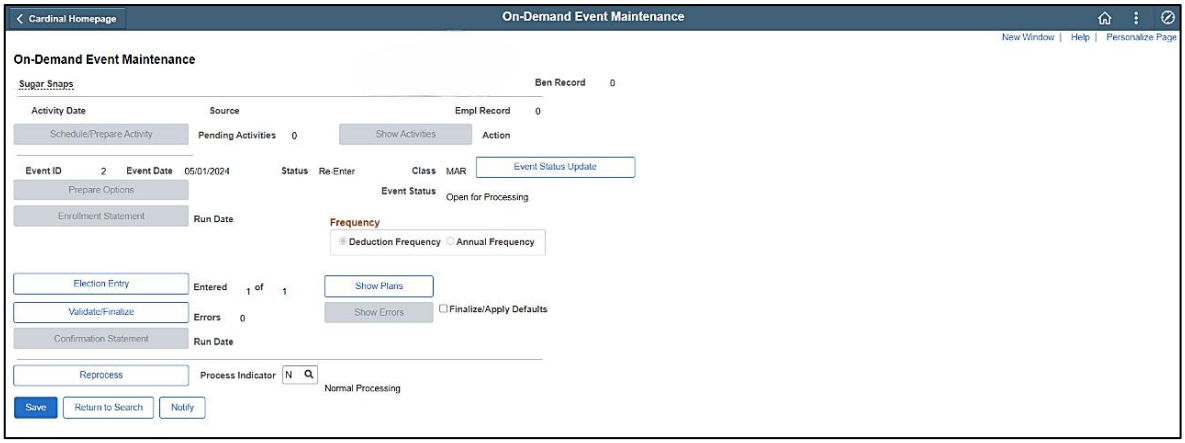
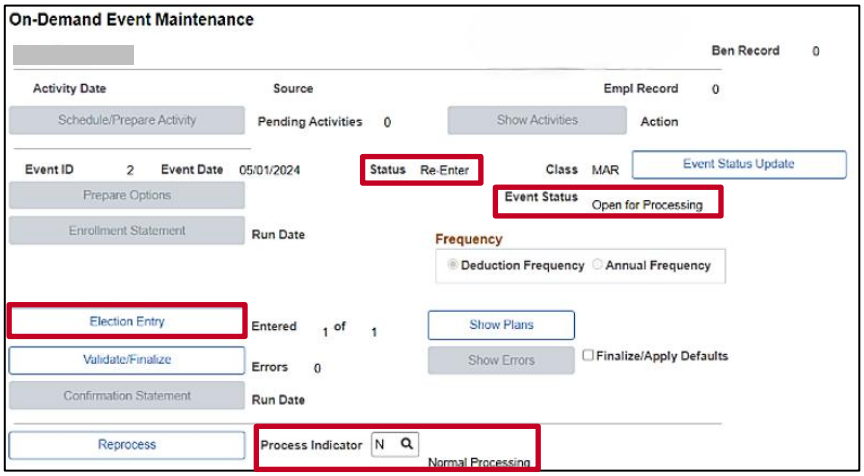
Step	Action
The **Update Event Status** page displays in a pop-up window. 	
5.	Review the events listed and identify the event used to enroll the dependents. **Note**: Most of the time, this process involves searching for a New Hire, recent life event, or Open Enrollment event. In this example, it is a MAR (Marriage) Benefit Event. Once the event is identified, it will need to be re-opened to approve the dependent. 
6.	Click the **Process** dropdown button and select “Re-Enter”. 

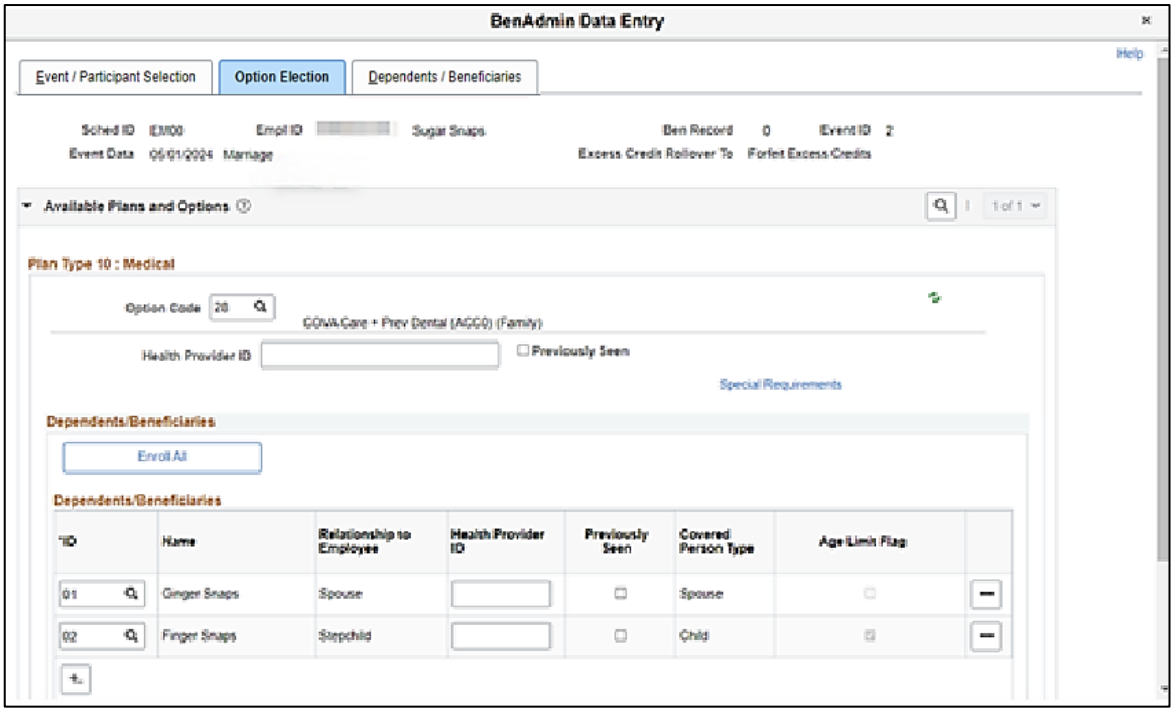
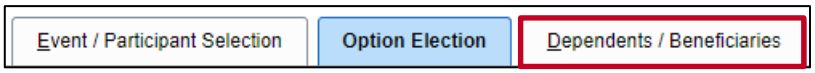
Step	Action
7.	Click the **Event Status** dropdown button and select “Open for Processing”. 
8.	Click the **OK** button at the bottom of the page.

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

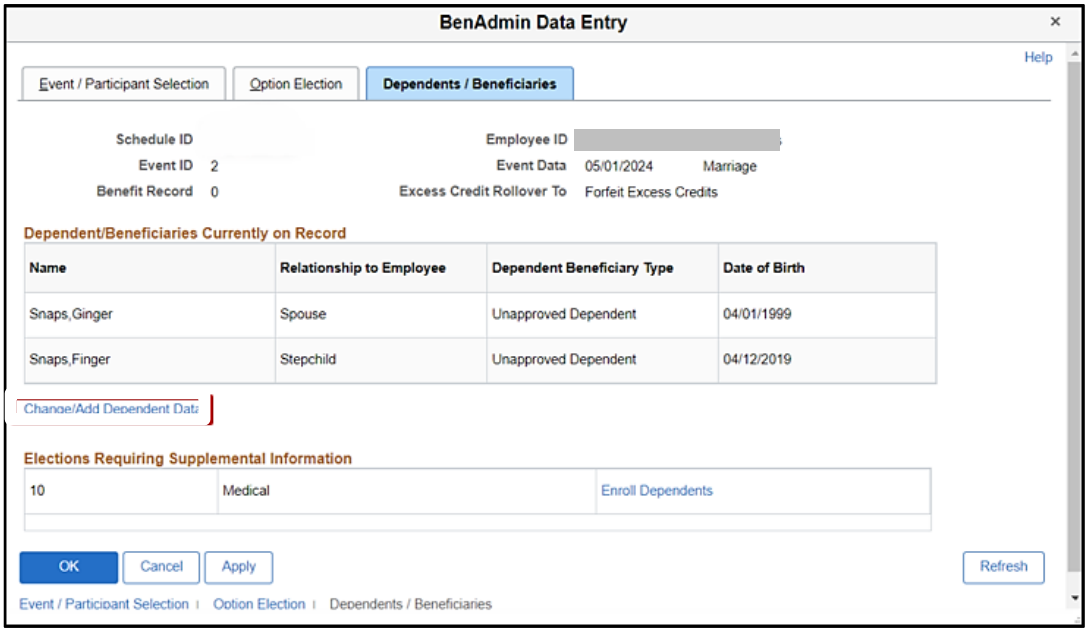


Step	Action
	The **Status** field still displays “Finalized – Enrolled”. The **Event Status** field now displays as “Open for Processing”. The **Process Indicator** field displays an “R” for Re-Enter. Notice that the **Election Entry** button is disabled. 
9.	Click the **Reprocess** button.
A **Confirmation** messages displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	
10.	Click the **OK** button to close the message.

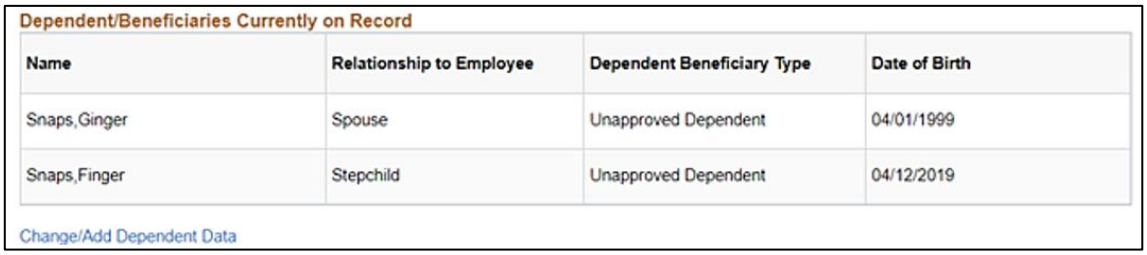
Step	Action
	The **On-Demand Event Maintenance** page redisplays. 
	The **Status** field now displays “Re-Enter”. The **Event Status** field still displays as “Open for Processing”. The **Process Indicator** field now displays an “N” for Normal Processing. Notice that the **Election Entry** button is enabled. 
11.	Click the **Election Entry** button.

Step	Action
The **BenAdmin Data Entry** page displays with the **Option Election** tab displayed by default. 	
12.	Click the **Dependents / Beneficiaries** tab. 

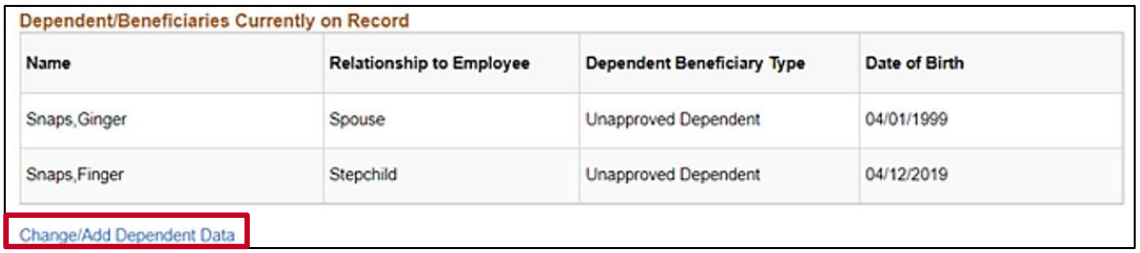
Step	Action
	The **Dependents/Beneficiaries** tab displays.

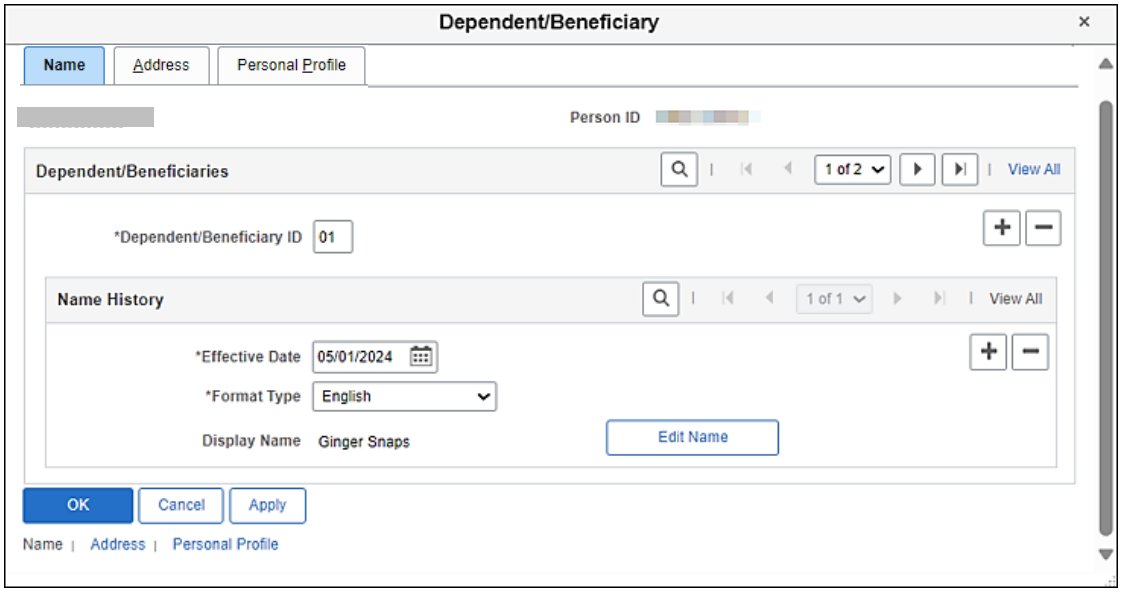


Review the dependents in the **Dependent/Beneficiaries Currently on Record** table. Note that the dependents currently have a status of “Unapproved Dependent”.

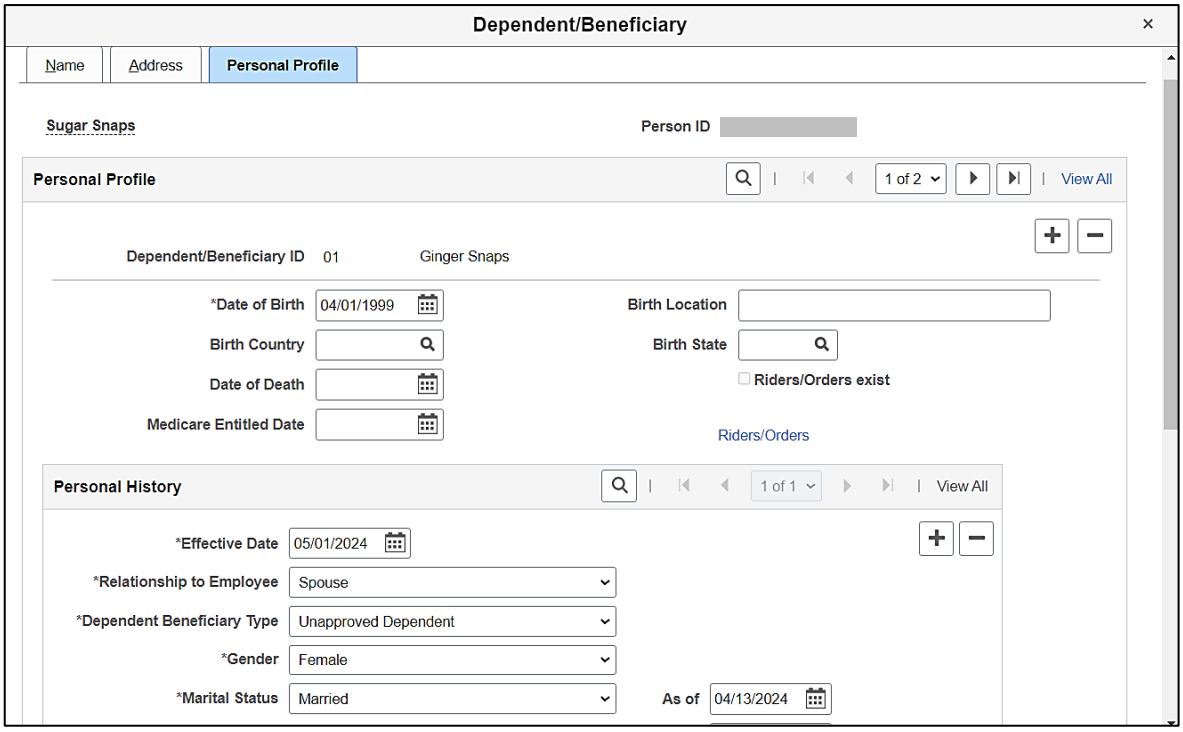


13. Click the **Change/Add Dependent** Data link.

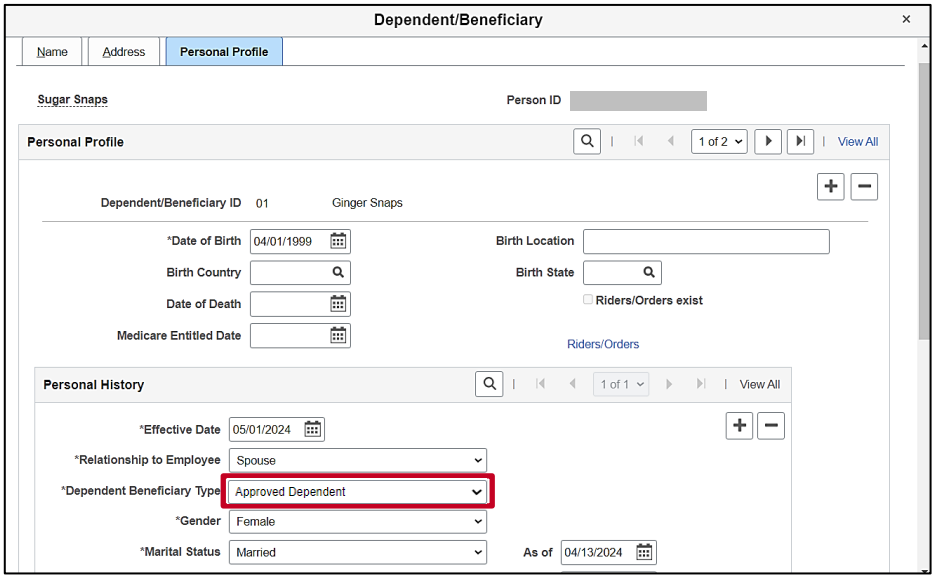


Step	Action
The **Dependent/Beneficiary** page displays. 	
14.	Click the **Personal Profile** tab.

Step	Action
The **Personal Profile** tab displays.	

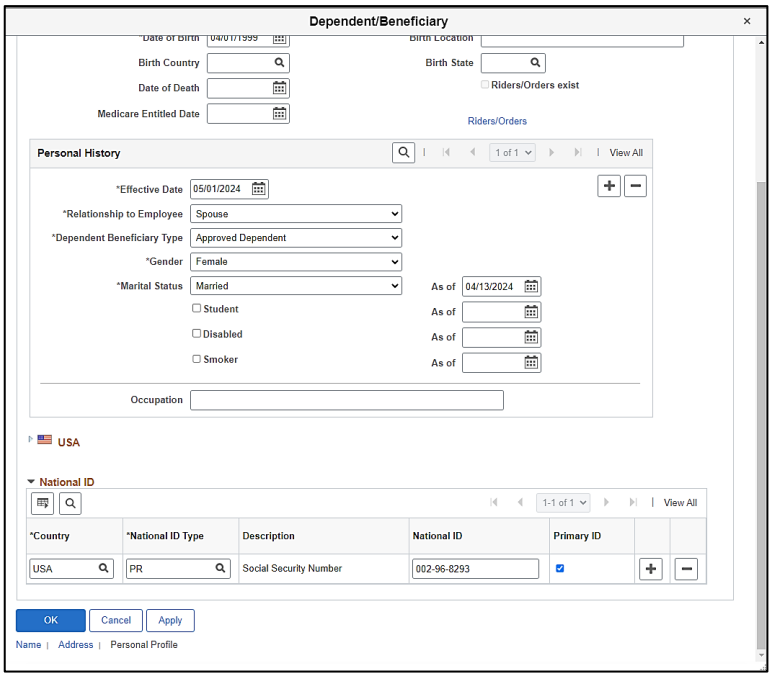


	Ensure that you are viewing the applicable dependent.
15.	Click the **Dependent Beneficiary Type** dropdown button and select “Approved Dependent”



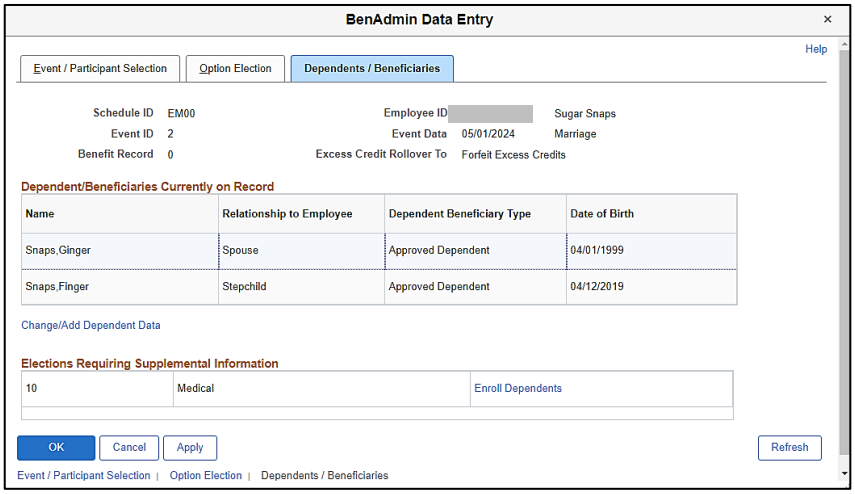
Step	Action
16.	Scroll down to the bottom of the page.

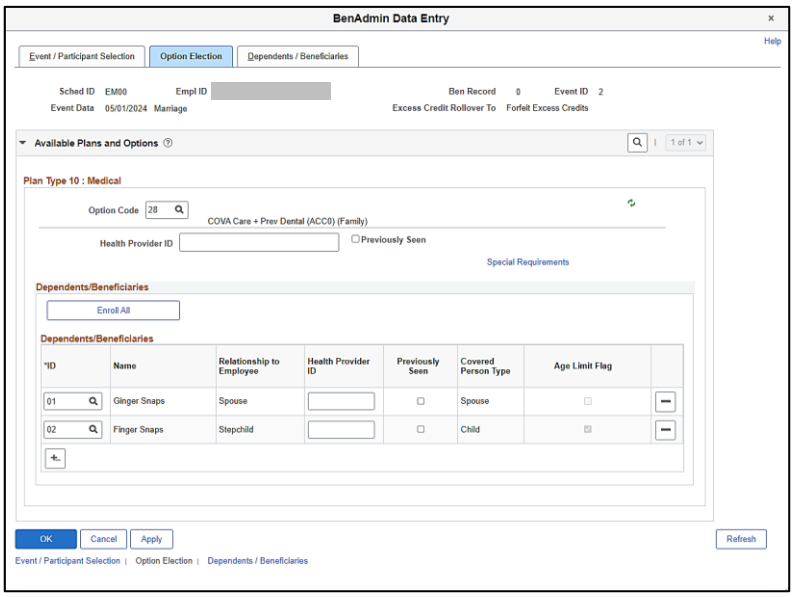
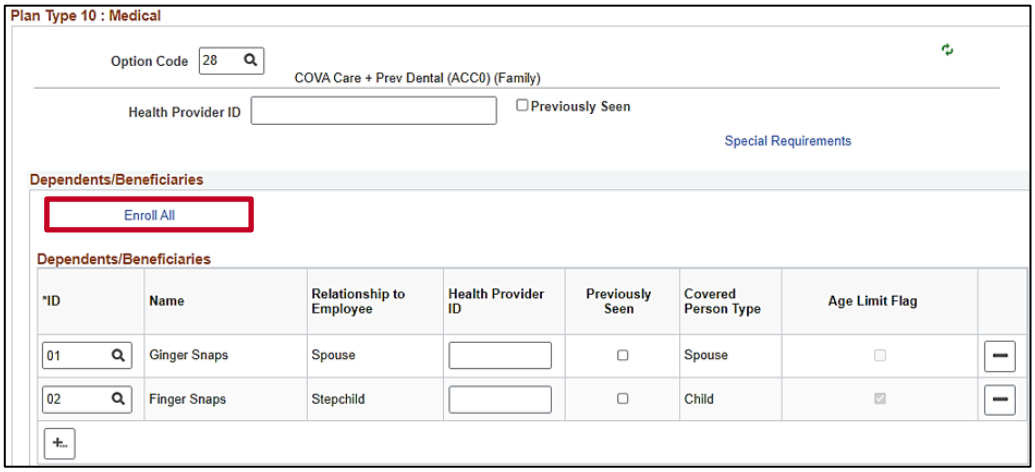
The bottom of the **Dependent/Beneficiary** page displays.

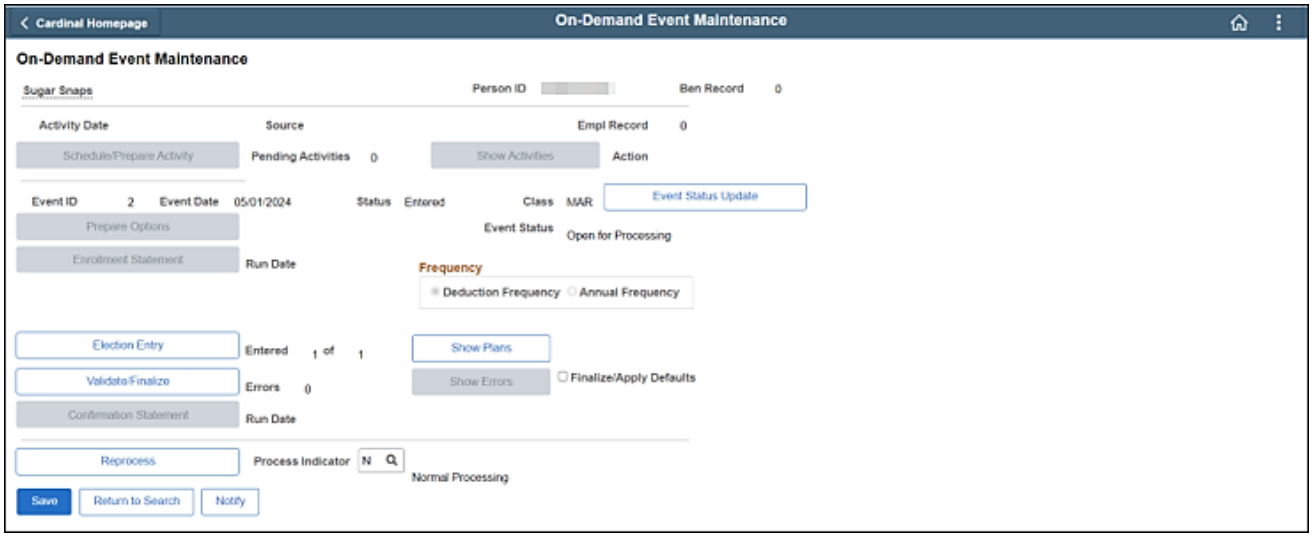
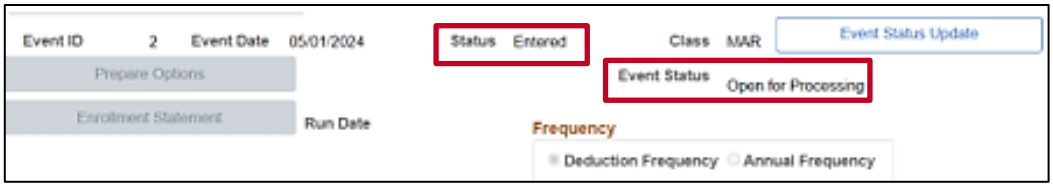
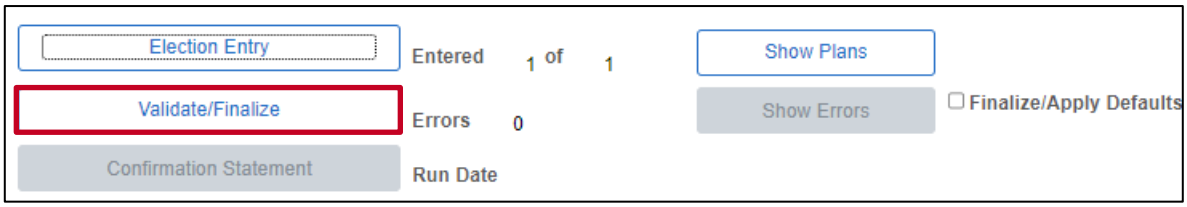
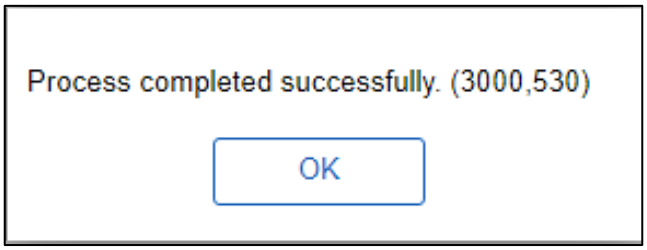


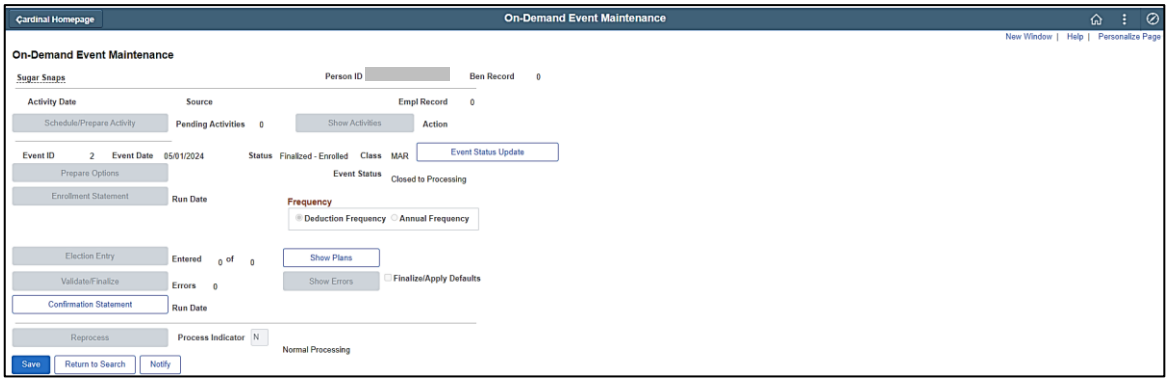
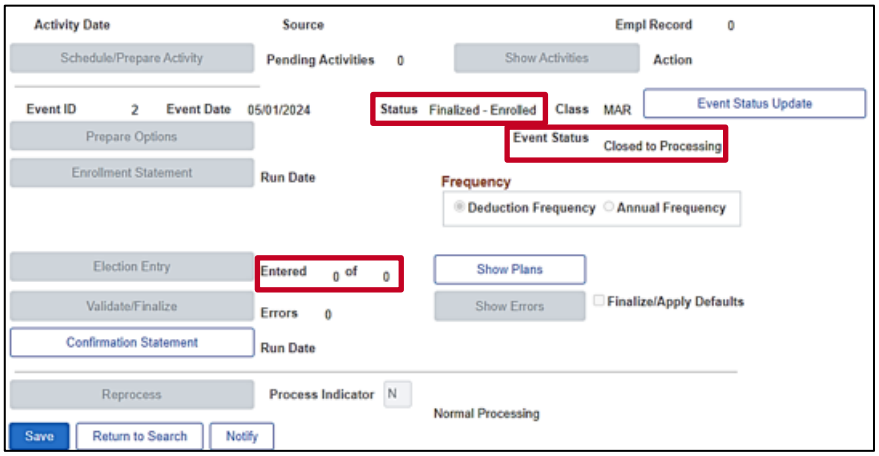
17.	Repeat these steps to update the status to “Approved Dependent” for any additional dependents as needed and then click the **OK** button at the bottom of the page.

The **Dependents / Beneficiaries** tab redisplays



Step	Action
18.	Once all dependents have been changed from “Unapproved Dependent” to “Approved Dependent”, click the **Option Election** tab.
The **Option Election** tab displays.  	
19.	Review the **Dependents/Beneficiaries** table and ensure that are applicable dependents are enrolled. Click the **Enroll All** button as needed. 
20.	Click the **OK** button at the bottom of the page.

Step	Action
The **On-Demand Maintenance** page displays. 	
21.	Confirm that the **Status** field now displays as “Entered” and the **Event Status** field is still “Open for Processing”. 
22.	Click the **Validate/Finalize** button. 
A **Confirmation** messages displays in a pop-up window to acknowledge that the manual Benefits Administration process has been completed successfully. 	

Step	Action
23.	Click the **OK** button.
The **On-Demand Event Maintenance** page redisplays. 	
24.	Confirm that the **Status** field now displays as “Finalized-Enrolled” and the **Event Status** field is now “Closed to Processing”. **Note**: The number of elections entered will reset back to “0 of 0”. 
25.	Click the **Save** button.