

Reviewing Employee Benefits Information Overview

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to review the various elements of Benefits information for an employee. This Job Aid contains sections detailing the processes for reviewing each of the following pages:

- **Health Benefits** page: Used to review the current, historical, and future dated health benefit enrollments for an employee
- **Simple Benefits** page: Used to review the current, historical, and future dated premium reward and flex spending admin fee enrollments for an employee
- **Life and AD/D Benefits** page: Used to review the imputed life enrollment for an employee
- **Spending Accounts** page: Used to review the current, historical, and future dated Flex Spending Medical and/or Flex Spending Dependent Care enrollments for an employee
- **Savings Plan** page: Used to review the current, historical, and future dated Savings Plan enrollments for an employee
- **Retirement Plans** page: Used to review the current, historical, and future dated Retirement Plan enrollments for an employee
- **Current Benefits Summary** page: Used to review all of the current enrollments for an employee

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

Table of Contents

Revision History	2
Reviewing the Health Benefits Page	3
Reviewing the Simple Benefits Page.....	5
Reviewing the Life and AD/D Benefits Page	7
Reviewing the Spending Accounts Page.....	9
Reviewing the Savings Plans Page.....	11
Reviewing the Retirement Plans Page	13
Reviewing the Current Benefits Summary Page	15



BN361 Reviewing Employee Benefits Information

Revision History

Revision Date	Summary of Changes
1/12/2026	Cross reference added to the BN361 Linking Dependents to Retirees Job Aid in Section 1 , after Step 5.
3/1/2025	Updated the screenshots of the Search pages (Section 1 , after Step 1, Section 2 , after Step 1; Section 3 , after Step 1; Section 4 , after Step 1; Section 5 , after Step 1; Section 6 , after Step 1; Section 7 , after Step 1). Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.



Reviewing the Health Benefits Page

The **Health Benefits** page is used to review the health plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The enrolled dependents are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Health Benefits page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Health Benefits

The **Health Benefits Find an Existing Value** page displays.

← Cardinal Homepage Health Benefits

Health Benefits

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

Benefit Record Number =

Name begins with

Last Name begins with

Business Unit begins with

Department Set ID begins with

Department begins with

Organizational Relationship =

Alternate Character Name begins with

^ Show fewer options

☐ Case Sensitive ☐ Include History ☐ Correct History

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**.



Benefits Job Aid

BN361 Reviewing Employee Benefits Information

Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> <div><div>Empl ID</div><div>begins with ▾</div><div></div></div>
3.	<p>Click the Include History checkbox.</p> <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div>
4.	<p>Click the Search button.</p> <div><div>Search</div><div>Clear</div></div>

The **Health Benefits** page displays.

5.	Review the information as needed.
	<p>If a red link appears on this page with the words “THIS PARTICIPANT HAS A LINKED RELATIONSHIP”, this means the employee is a Retiree with one or more Linked Dependent, or a Dependent linked to a Retiree. For more information, refer to the Job Aid titled BN361 Linking Dependents and Retirees on the Cardinal website in Job Aids under Learning.</p> <div><div>Enroll All Dependents</div><div>THIS PARTICIPANT HAS A LINKED RELATIONSHIP</div></div>



Reviewing the Simple Benefits Page

The **Simple Benefits** page is used to review the Premium Reward and Flex Spending Admin Fee enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Simple Benefits page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Simple Benefits

The **Simple Benefits Find an Existing Value** page displays.

← Cardinal Homepage Simple Benefit

Simple Benefit

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

Benefit Record Number =

Name begins with

Last Name begins with

Business Unit begins with

Department Set ID begins with

Department begins with

Organizational Relationship =

Alternate Character Name begins with

^ Show fewer options

☐ Case Sensitive ☐ Include History ☐ Correct History

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**.



Benefits Job Aid

BN361 Reviewing Employee Benefits Information

Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> <div><div>Empl ID</div><div>begins with ▾</div><div></div></div>
3.	<p>Click the Include History checkbox.</p> <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div>
4.	<p>Click the Search button.</p> <div><div>Search</div><div>Clear</div></div>

The **Simple Benefits** page displays.

Cardinal Homepage Simple Benefit

Employee ID Benefit Record Number 0

Plan Type 1 of 2 View All

Plan Type AY Health Premium Reward

Coverage 1 of 1 View All

Coverage Begin Date 08/01/2023 Deduction Begin Date 08/01/2023

Coverage Election

Elect Waive Terminate Election Date 12/06/2023

Benefit Program SAL Salaried Employee Benefit Pgm

Benefit Plan

Save Return to Search Notify Refresh Update/Display Include History

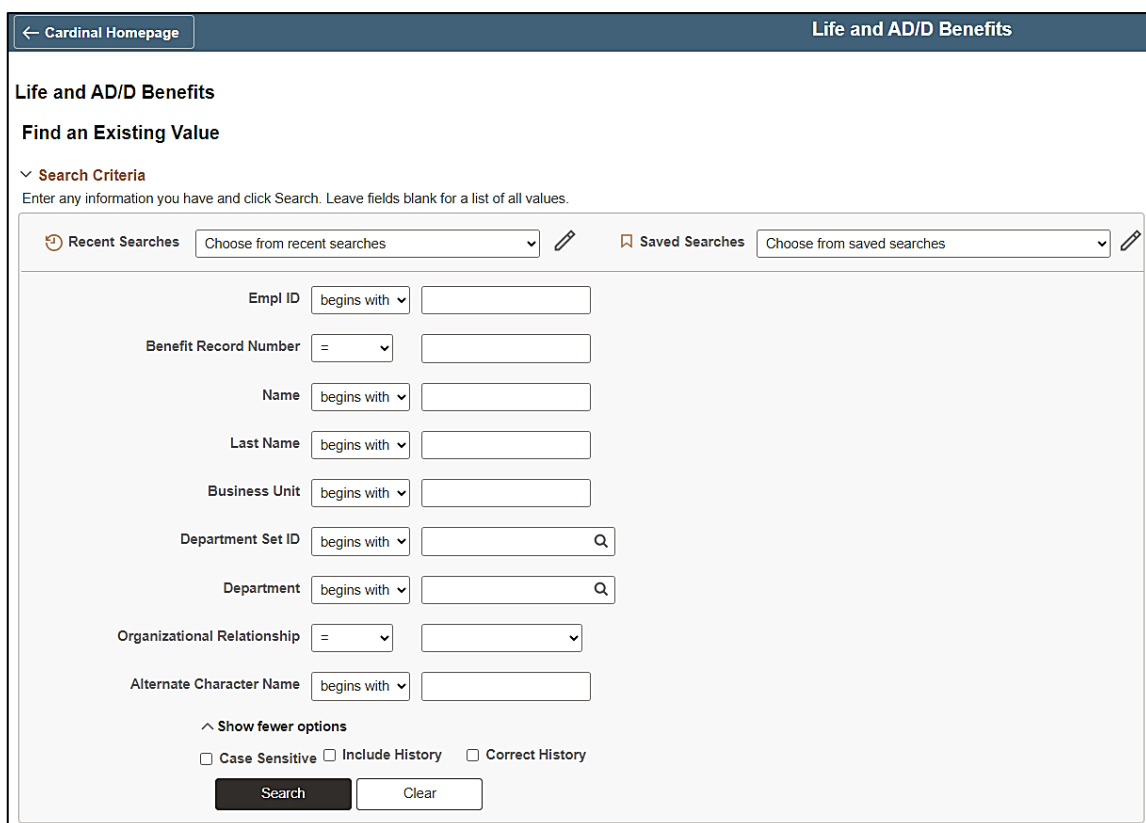
5.	<p>Click the View All link in order to see all of the enrollments and review the information as needed.</p> <div><div>Simple Benefits</div><div>Employee ID Benefit Record Number 0</div><div>Plan Type 1 of 2 View All</div></div>
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Reviewing the Life and AD/D Benefits Page

The **Life and AD/D** page is used to review the Imputed Life Insurance Income Plan enrollment for an employee. The assigned Beneficiary or Beneficiaries are also available for review on this page as applicable.

Step	Action
1.	Navigate to the Life and AD/D Benefits page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Life and AD/D Benefits

The **Life and AD/D Benefits Find an Existing Value** page displays.



	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal website in Job Aids under Learning .
2.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known. 



Benefits Job Aid

BN361 Reviewing Employee Benefits Information

Step	Action
3.	<p>Click the Include History checkbox.</p> <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div>
4.	<p>Click the Search button.</p> <div><div>Search</div><div>Clear</div></div>
<p>The Life and AD/D Benefits page displays.</p> <div></div>	
5.	<p>Review the information as needed.</p>

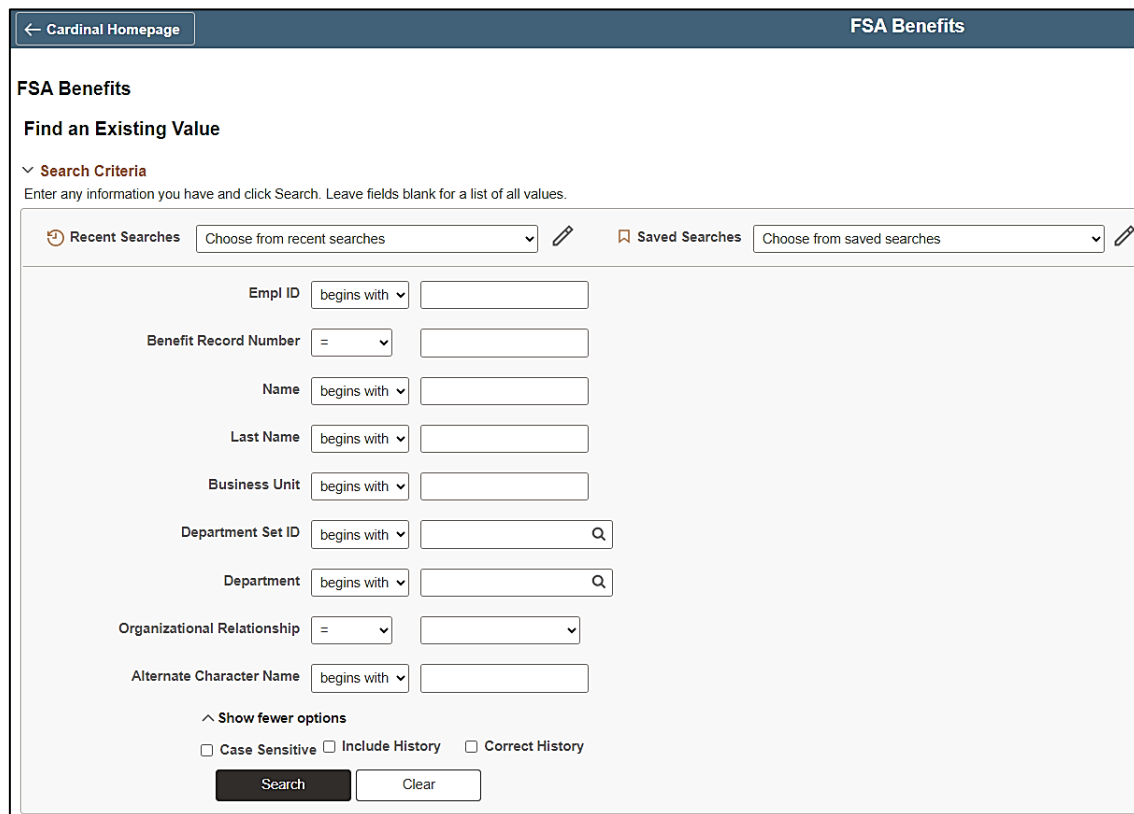
Reviewing the Spending Accounts Page

The **Spending Accounts** page is used to review the Flex Spending Medical and Flex Spending Dependent Care plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. Remember, employees must elect Flex Spending Accounts each Plan Year as desired.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Spending Accounts page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Spending Accounts

The **FSA Benefits Find an Existing Value** page displays.



The screenshot shows the 'FSA Benefits' section of the Cardinal HCM interface. At the top, there is a navigation bar with '← Cardinal Homepage' and 'FSA Benefits'. Below this, the page title 'FSA Benefits' is followed by the sub-header 'Find an Existing Value'. A section titled 'Search Criteria' with a dropdown arrow indicates that users should enter information and click 'Search'. Below this, there are two search history sections: 'Recent Searches' and 'Saved Searches', each with a dropdown menu and an edit icon. The main search area contains several fields with dropdown menus and text input boxes: 'Empl ID' (begins with), 'Benefit Record Number' (=), 'Name' (begins with), 'Last Name' (begins with), 'Business Unit' (begins with), 'Department Set ID' (begins with), 'Department' (begins with), 'Organizational Relationship' (=), and 'Alternate Character Name' (begins with). At the bottom of the search area, there is a 'Show fewer options' link, three checkboxes for 'Case Sensitive', 'Include History', and 'Correct History', and two buttons: 'Search' and '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**.



Benefits Job Aid

BN361 Reviewing Employee Benefits Information

Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> <div><div>Empl ID</div><div>begins with ▾</div><div></div></div>
3.	<p>Click the Include History checkbox.</p> <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div>
4.	<p>Click the Search button.</p> <div><div>Search</div><div>Clear</div></div>

The **Spending Accounts** page displays.

Cardinal Homepage Spending Accounts

Employee ID Benefit Record Number 0

Plan Type 60 Flex Spending Medical

Coverage

*Coverage Begin Date 08/01/2023 *Deduction Begin Date 08/01/2023

Coverage Election ☒ Elect ☐ Waive ☐ Terminate

*Election Date 12/06/2023

Benefit Program Salaried Employee Benefit Pgm

Benefit Plan FLXMED Medical Flex Spending Account

Option Code 1

Contribution Level

Annual Pledge \$1000.00

Credit Rollover Included in Pledge \$0.00

Employee Contribution Override Monthly

Carryforward

Carryover Amount 0.00

Account Information

FSA Account Status Active

Contributions YTD \$0.00

Employee Status Active

Save Return to Search Notify Refresh Update/Display Include History

5. Click the **View All** link in order to see all of the enrollments and review the information as needed.

Spending Accounts

Employee ID Benefit Record Number 0

Plan Type 60 Flex Spending Medical

View All

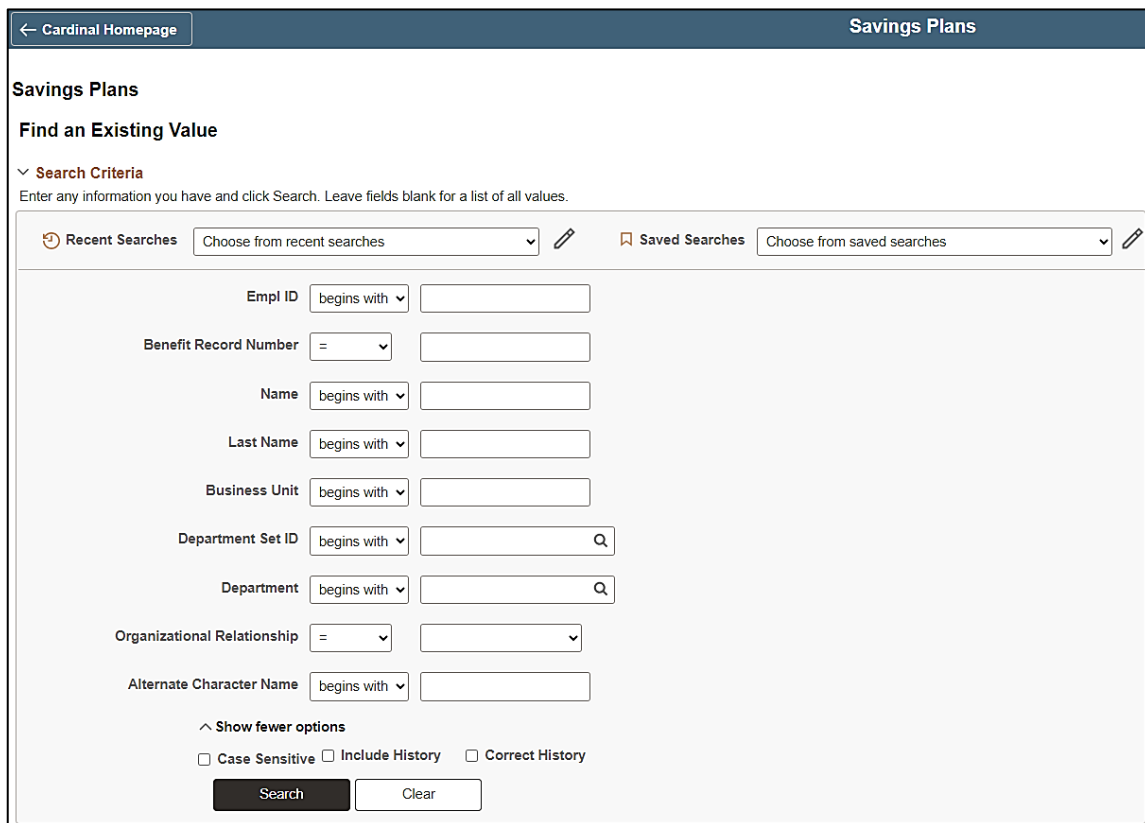
Reviewing the Savings Plans Page

The **Savings Plans** page is used to review the Savings Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments. The assigned Beneficiary or Beneficiaries are also available for review on this page as applicable.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Savings Plans page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Savings Plans

The **Savings Plans Find an Existing Value** page displays.



The screenshot shows the 'Savings Plans' page with the 'Find an Existing Value' section. It includes search criteria fields for Empl ID, Benefit Record Number, Name, Last Name, Business Unit, Department Set ID, Department, Organizational Relationship, and Alternate Character Name. There are also sections for Recent Searches and Saved Searches, and a 'Search' button.



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**.



Benefits Job Aid

BN361 Reviewing Employee Benefits Information

Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> <div><div>Empl ID</div><div>begins with ▾</div><div></div></div>
3.	<p>Click the Include History checkbox.</p> <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div>
4.	<p>Click the Search button.</p> <div><div>Search</div><div>Clear</div></div>

The **Savings Plans** page displays.

The screenshot shows the 'Savings Plans' page. At the top, there are fields for 'Employee ID' and 'Benefit Record Number'. Below these, there's a 'Plan Type' section with '46' and '403(b)' selected. The 'Coverage' section shows 'Coverage Election' with 'Elect' selected, and 'Deduction Begin Date' set to '01/01/2024'. The 'Election Date' is '12/06/2023'. There are also sections for 'Before Tax Investment' and 'After Tax Investment', each with 'Flat Amount' and 'Percent of Earnings' fields. At the bottom, there's a 'Dependent/Beneficiaries' table with columns for ID, Name, Relationship to Employee, Beneficiary Percentage, Flat Amount, Excess, and Contingent.

5.	<p>Click the View All link in order to see all of the enrollments and review the information as needed.</p> <div><div>Savings Plans</div><div><div>Employee ID</div><div>Benefit Record Number 0</div></div><div><input type="checkbox"/> Highly Compensated</div><div><div>Plan Type</div><div>46 403(b)</div><div>View All</div></div></div>
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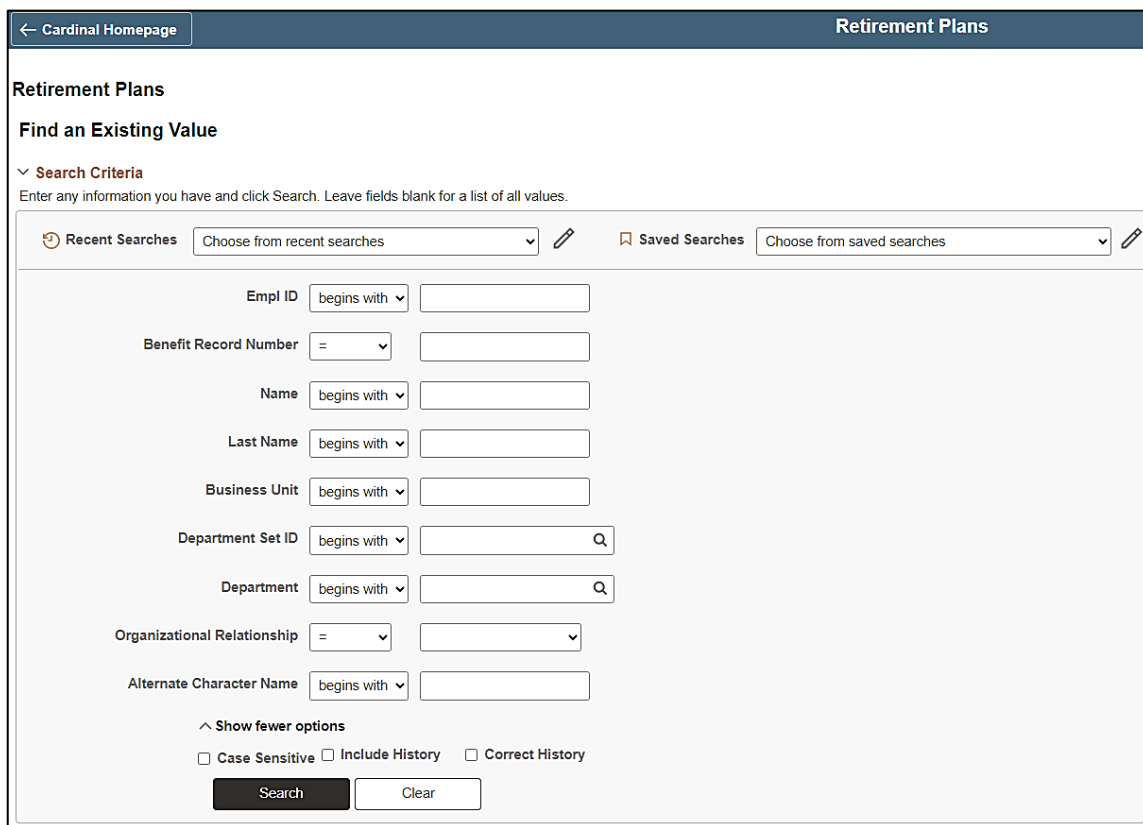
Reviewing the Retirement Plans Page

The **Retirement Plans** page is used to review the Retirement Plan enrollments for an employee. On this page, the Benefits Administrator can review current enrollments, historical enrollments, and future dated enrollments.

Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	Navigate to the Retirement Plans page using the following path: NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans

The **Retirement Plans Find an Existing Value** page displays.



The screenshot shows the 'Retirement Plans' section with a 'Find an Existing Value' sub-header. Below this is a 'Search Criteria' section with a note: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There are two search history sections: 'Recent Searches' and 'Saved Searches', both with dropdown menus and edit icons. The main search area contains several fields with dropdown menus and text inputs: 'Empl ID' (begins with), 'Benefit Record Number' (=), 'Name' (begins with), 'Last Name' (begins with), 'Business Unit' (begins with), 'Department Set ID' (begins with), 'Department' (begins with), 'Organizational Relationship' (=), and 'Alternate Character Name' (begins with). At the bottom, there are checkboxes for 'Case Sensitive', 'Include History', and 'Correct History', followed by 'Search' and 'Clear' buttons.



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**.



Benefits Job Aid

BN361 Reviewing Employee Benefits Information

Step	Action
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> <div><div>Empl ID</div><div>begins with ▾</div><div></div></div>
3.	<p>Click the Include History checkbox.</p> <div><input type="checkbox"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History</div>
4.	<p>Click the Search button.</p> <div><div>Search</div><div>Clear</div></div>

The **Retirement Plans** page displays.

The screenshot shows the 'Retirement Plans' page. At the top, there's a header with 'Cardinal Homepage' and 'Retirement Plans'. Below this, there are search filters for 'Employee ID' and 'Benefit Record Number'. The main section is titled 'Retirement Plans' and contains a 'Plan Type' dropdown set to '70' and 'Employee Retirement DB'. Below this, there's a 'Coverage' section with various options: 'Deduction Begin Date' (01/01/2024), 'Participation Election' (Elect, Waive, Terminate), 'Benefit Program' (Salaried Employee Benefit Pgm), 'Benefit Plan' (ELOFCL), 'Election Date' (12/06/2023), 'Payroll Status' (Active), and 'Option Code' (1). At the bottom, there are buttons for 'Save', 'Return to Search', 'Notify', 'Refresh', 'Update/Display', and 'Include History'.

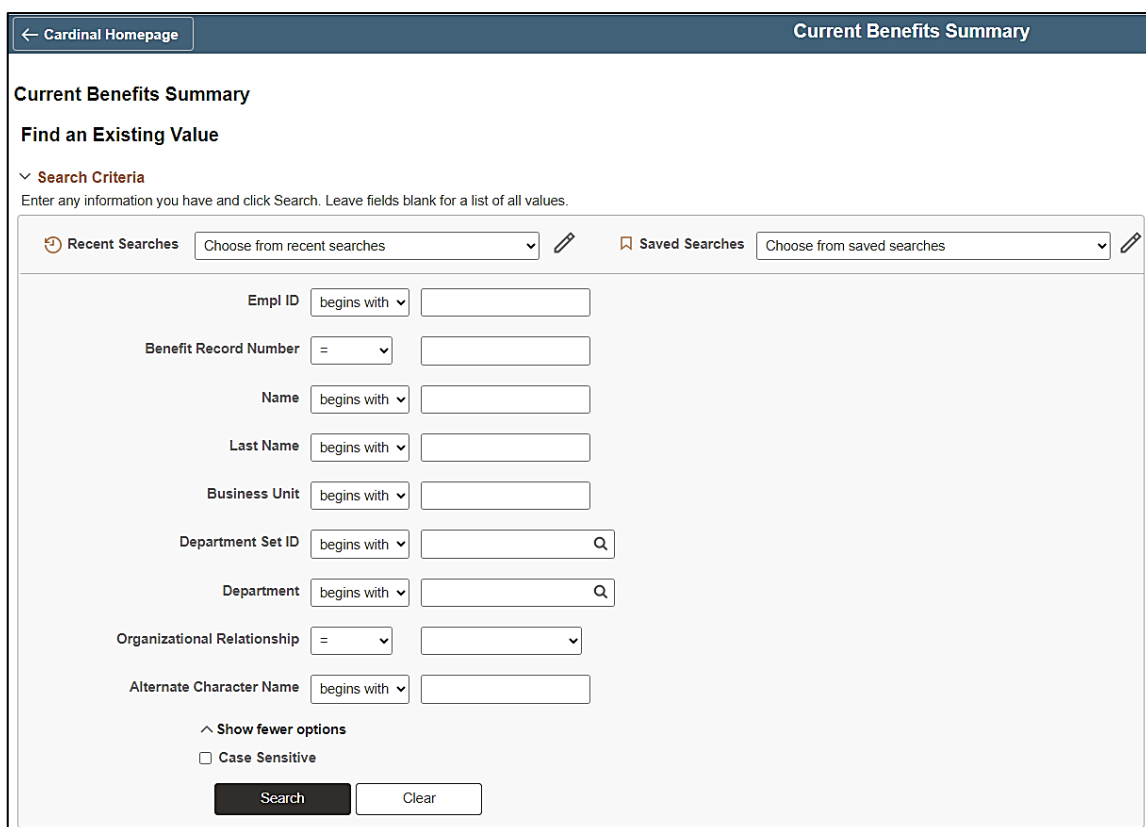
5.	<p>Click the View All link in order to see all of the enrollments and review the information as needed.</p> <div><div><div>Retirement Plans</div><div><div>Employee ID</div><div>Benefit Record Number 0</div></div><div><div>Plan Type</div><div>1 of 1 ▾</div><div>View All</div></div><div><div>Plan Type 70</div><div>Employee Retirement DB</div></div></div></div>
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BN361 Reviewing Employee Benefits Information
Reviewing the Current Benefits Summary Page

The **Current Benefits Summary** page is used to review all of the current enrollments for an employee. Historical and future dated enrollments will not display on this page. This page can also be used to review the current deductions summary information for the employee.

Step	Action
1.	Navigate to the Current Benefits Summary page using the following path: NavBar > Menu > Benefits > Review Employee Benefits > Current Benefits Summary

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




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

2.

Enter the employee's Employee ID in the **Empl ID** field.

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





Benefits Job Aid

BN361 Reviewing Employee Benefits Information

Step	Action
3.	Click the Search button. <div><div>Search</div><div>Clear</div></div>

The **Current Benefits Summary** page displays with the **Benefits Enrollment Summary** tab displayed by default.

The screenshot shows the 'Current Benefits Summary' page with the 'Benefits Enrollment Summary' tab selected. The page displays employee information, benefits system details, and a table of current enrollments.

Plan Type	Coverage Election	Benefit Plan	Description	Coverage or Participation	Coverage Begin
Medical	Elect	ACCO	COVA Basic	Single	08/01/2023
Imputed Life	Elect	IMPLIF	IMP LIF	Salary X 2	07/10/2023
Flex Spending Medical	Elect	FLXMED	Med FSA	\$1000 Pledge	08/01/2023
Flex Spending Dependent Care	Waive			Waived	08/01/2023
Health Premium Reward	Waive			Waived	08/01/2023
Flex Spending Admin Fee	Elect	FLXFEE	FSA Admin Fee		08/01/2023

4.	Review the information as needed.
5.	Click the Benefit Deduction Summary tab. <div><div>Benefit Enrollment Summary</div><div>Benefit Deduction Summary</div></div>

The **Benefit Deduction Summary** tab displays.

The screenshot shows the 'Current Benefits Summary' page with the 'Benefit Deduction Summary' tab selected. The page displays employee information, payroll system details, and a 'Return to Search' button.

6.	Review the information as needed.
	Data will only be reflected on this tab if the Agency utilizes Cardinal payroll.