

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.

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**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.

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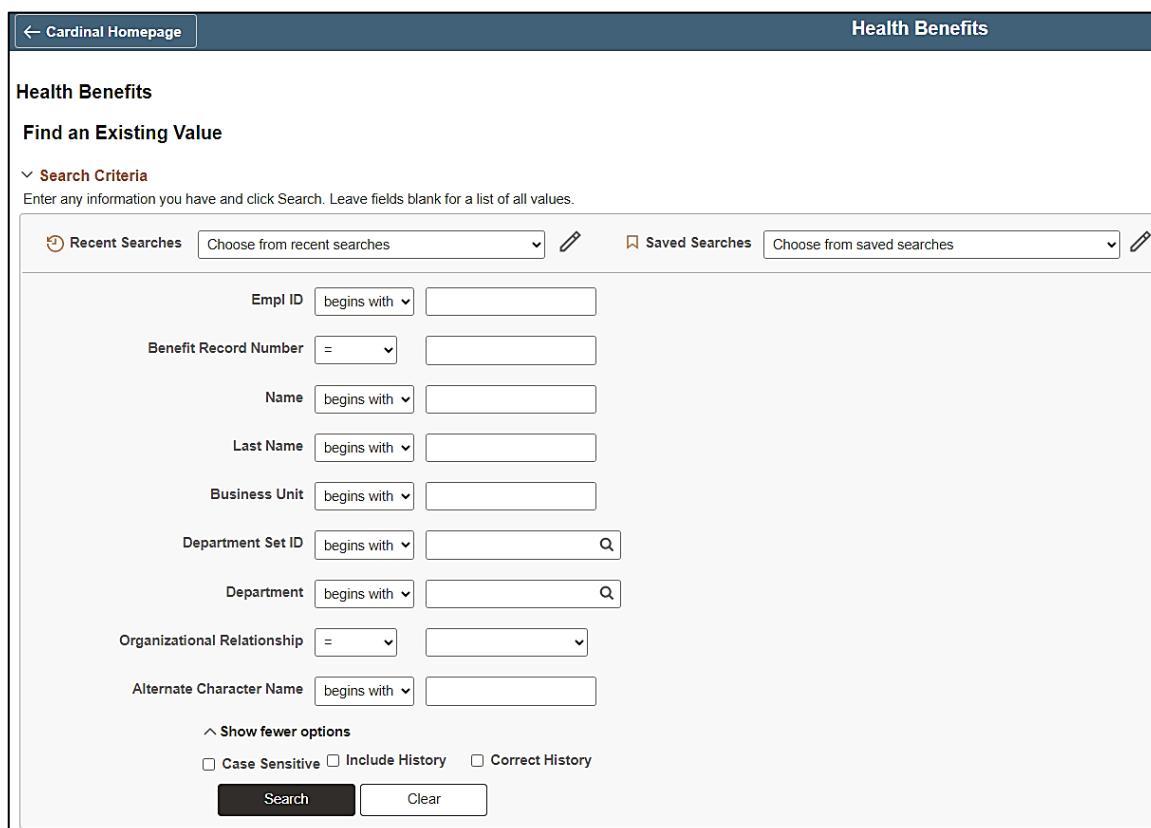
Reviewing the Health Benefits Page

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.

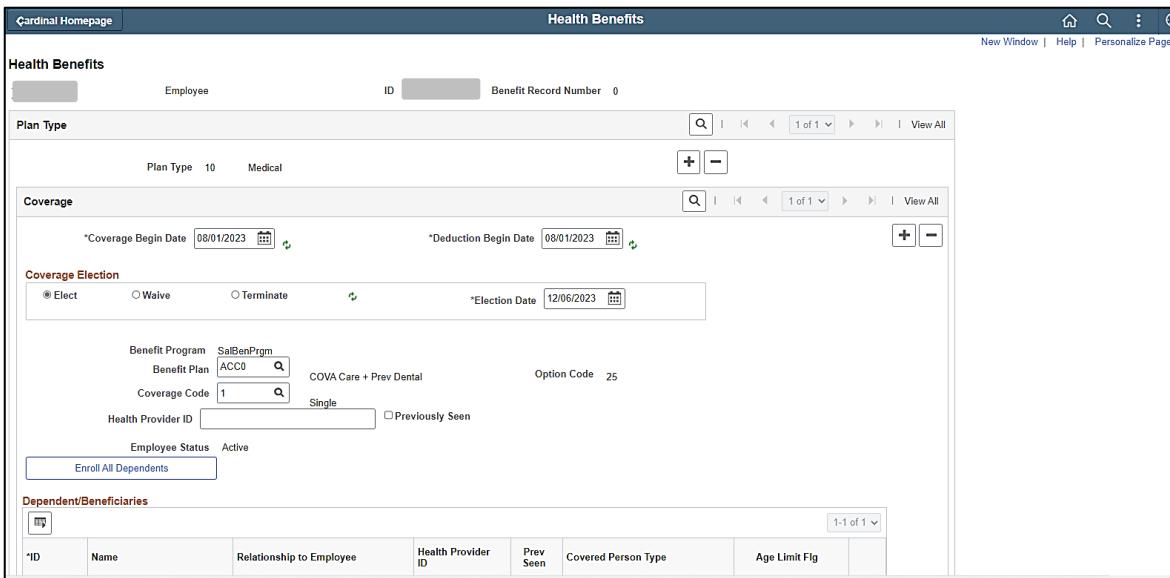



For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled **Overview of the Cardinal HCM Search Pages**. This Job Aid is located on the Cardinal website in **Job Aids** under **Learning**.

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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 style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Empl ID <input style="border: 1px solid #ccc; padding: 2px; margin-right: 10px;" type="text" value="began with"/> <input style="border: 2px solid red; width: 150px; height: 25px;" type="text"/> </div>
3.	<p>Click the Include History checkbox.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <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 style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <input style="background-color: #2e6b2e; color: white; padding: 5px; border: 1px solid #2e6b2e; border-radius: 5px; margin-right: 10px;" type="button" value="Search"/> <input style="border: 1px solid #ccc; padding: 5px; border-radius: 5px;" type="button" value="Clear"/> </div>

The **Health Benefits** page displays.



The screenshot shows the Health Benefits page with the following fields:

- Plan Type:** Plan Type 10, Medical.
- Coverage:** Coverage Begin Date: 08/01/2023, Deduction Begin Date: 08/01/2023.
- Coverage Election:** Elect (radio button selected), Waive, Terminate, Election Date: 12/06/2023.
- Benefit Program:** SalBenPrgm, Benefit Plan: ACC0, Coverage Code: 1.
- Health Provider ID:** COVA Care + Prev Dental, Option Code: 25, Single, Previously Seen.
- Employee Status:** Active.
- Dependent/Beneficiaries:** A table showing 1-1 of 1 record with columns: ID, Name, Relationship to Employee, Health Provider ID, Prev Seen, Covered Person Type, Age Limit Flg.

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 style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <input style="border: 1px solid #ccc; padding: 5px; border-radius: 5px; margin-right: 10px;" type="button" value="Enroll All Dependents"/> THIS PARTICIPANT HAS A LINKED RELATIONSHIP </div>

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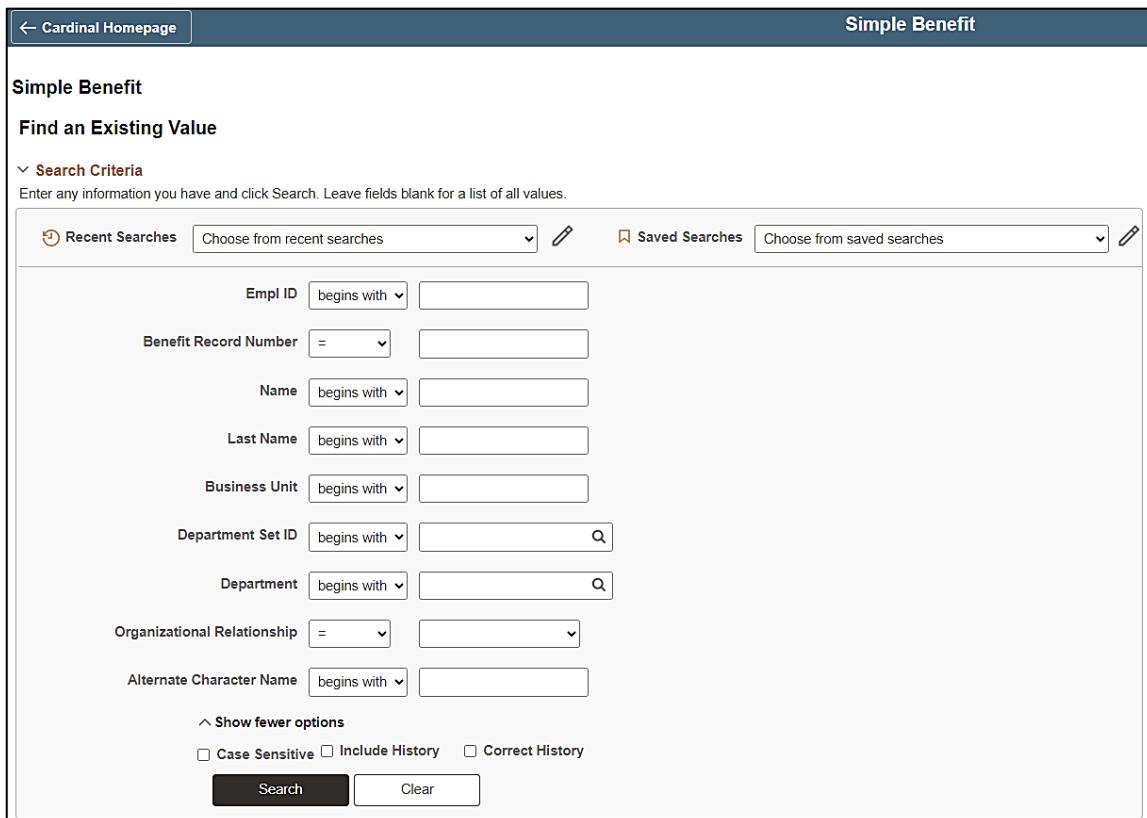
Reviewing the Simple Benefits Page

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.

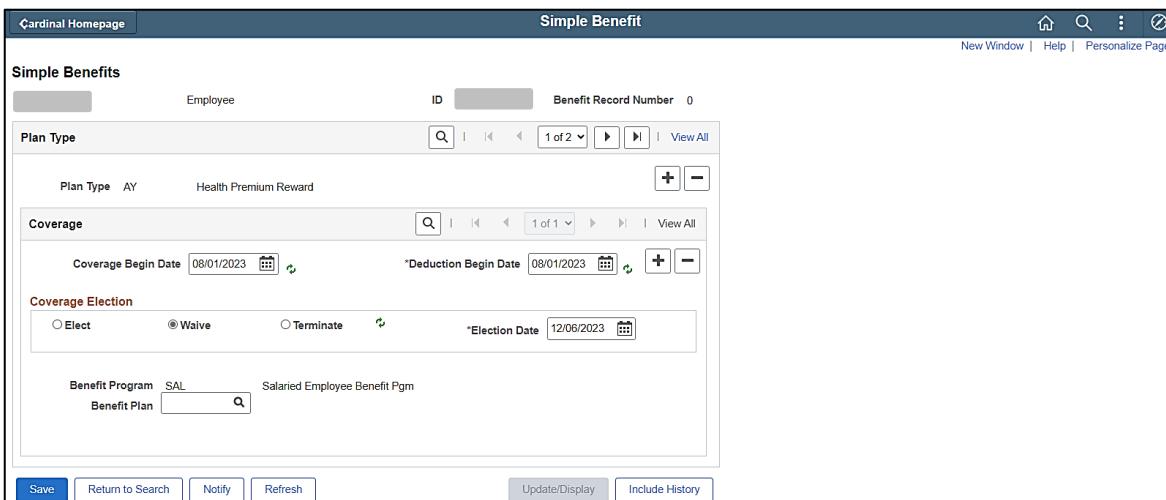


	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal website in Job Aids under Learning .
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Step	Action
2.	<p>Enter the employee's 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 style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Empl ID <input style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;" type="text" value="began with"/> <input style="border: 2px solid red; width: 150px; height: 25px;" type="text"/> </div>
3.	<p>Click the Include History checkbox.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <input type="checkbox" value="Case Sensitive"/> Case Sensitive <input checked="" type="checkbox"/> Include History <input type="checkbox"/> Correct History </div>
4.	<p>Click the Search button.</p> <div style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <input style="background-color: #333; color: white; padding: 5px; margin-right: 10px;" type="button" value="Search"/> <input style="border: 1px solid #ccc; padding: 5px;" type="button" value="Clear"/> </div>

The **Simple Benefits** page displays.



The screenshot shows the 'Simple Benefit' page with the following details:

- Employee:** [Redacted]
- ID:** [Redacted] **Benefit Record Number:** 0
- Plan Type:** AY Health Premium Reward
- 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:** SAL Salaried Employee Benefit Pgm
- Benefit Plan:** [Redacted]

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 style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Simple Benefits <div style="display: flex; justify-content: space-between;"> Employee ID: [Redacted] Benefit Record Number: 0 </div> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> Plan Type <div style="display: flex; justify-content: space-between;"> <input type="text"/> <input type="button" value="View All"/> </div> </div> </div>
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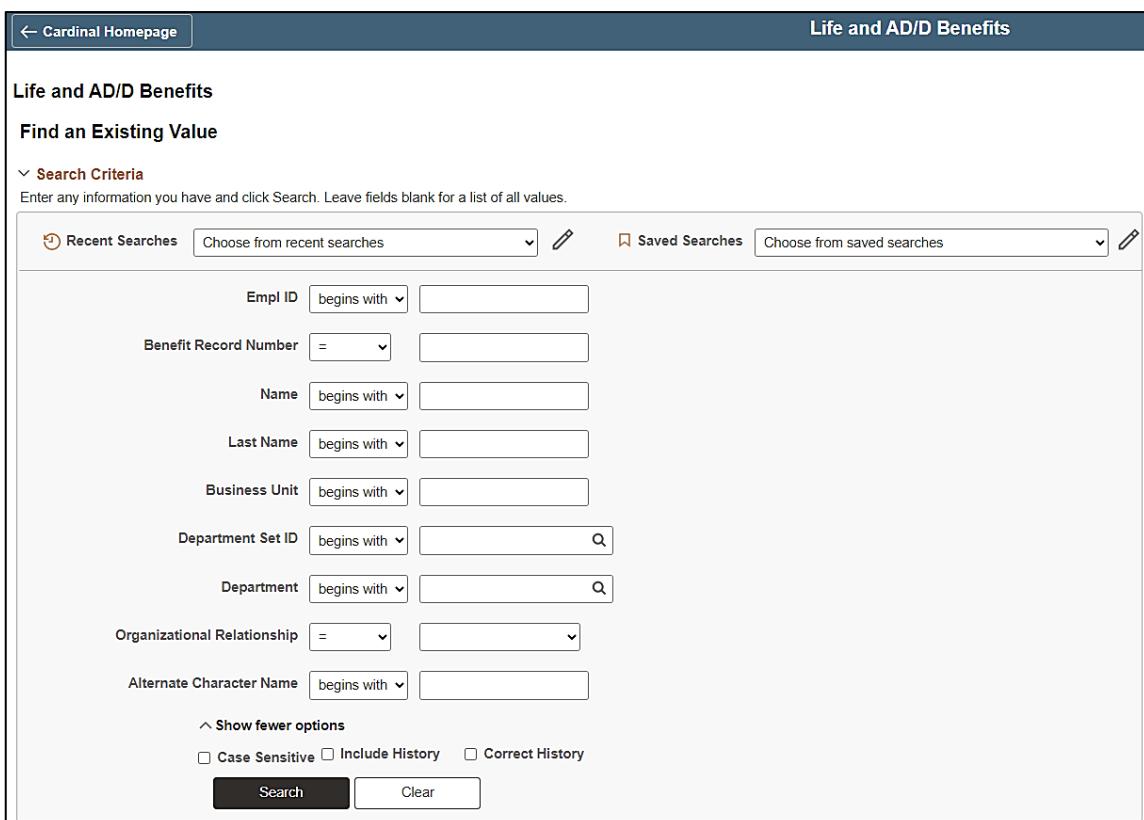
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Reviewing the Life and AD/D Benefits Page

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.

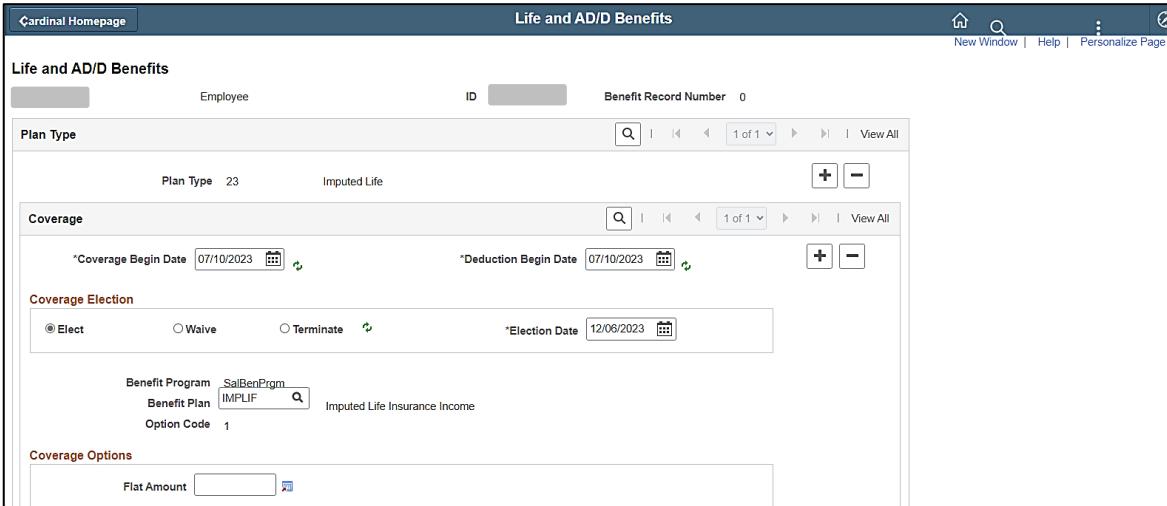


	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> <div data-bbox="306 1812 997 1881"> <p>Empl ID began with <input type="text"/></p> </div>

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Step	Action
3.	Click the Include History checkbox. 
4.	Click the Search button. 

The **Life and AD/D Benefits** page displays.



5.	Review the information as needed.
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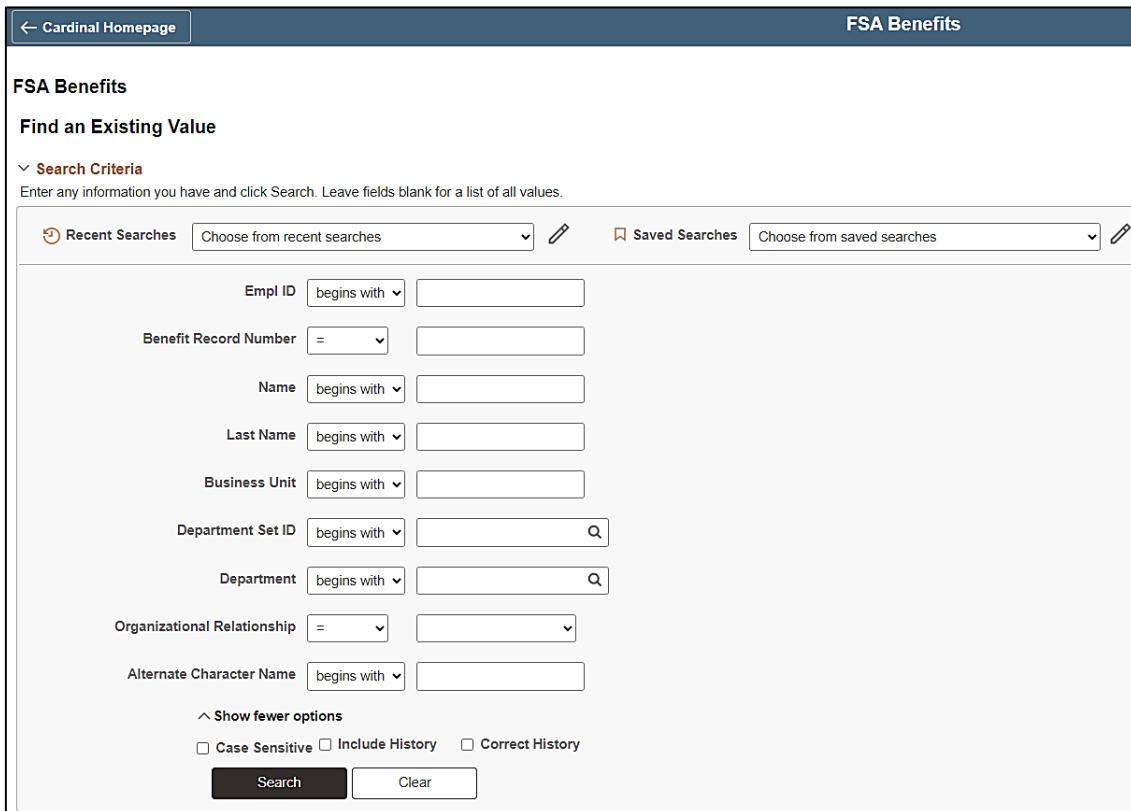
Reviewing the Spending Accounts Page

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.

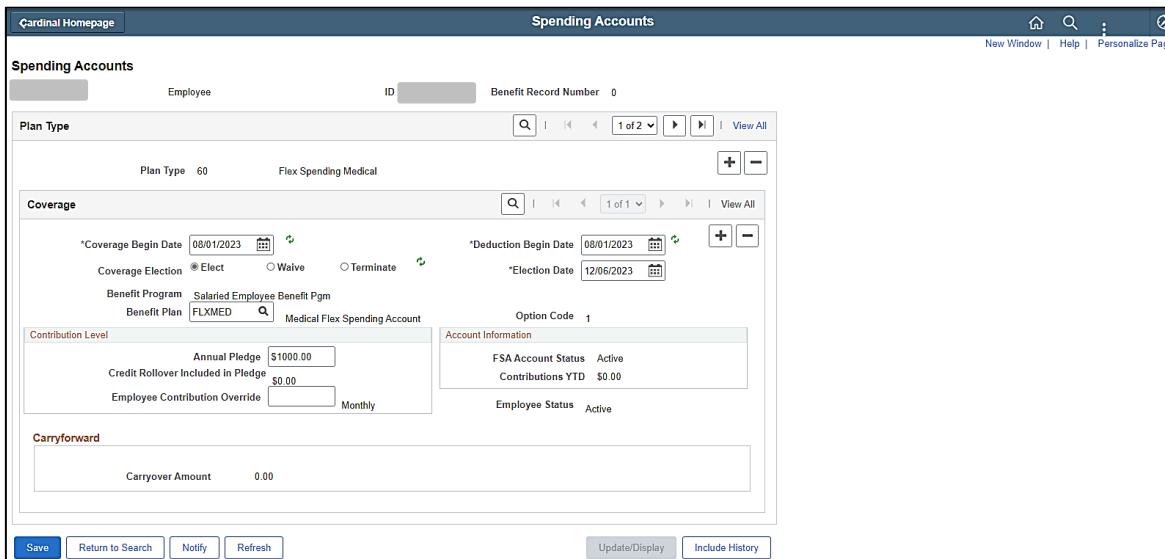


	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal website in Job Aids under Learning .
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Step	Action
2.	<p>Enter the employee's 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 style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Empl ID <input style="border: 1px solid #ccc; width: 100px;" type="text" value="began with"/> <input style="border: 2px solid red; width: 100px;" type="text"/> </div>
3.	<p>Click the Include History checkbox.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <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 style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <input style="background-color: #2196F3; color: white; padding: 5px; border: 1px solid #2196F3;" type="button" value="Search"/> <input style="border: 1px solid #ccc; padding: 5px;" type="button" value="Clear"/> </div>

The **Spending Accounts** page displays.



5.	<p>Click the View All link in order to see all of the enrollments and review the information as needed.</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> Spending Accounts <div style="display: flex; justify-content: space-between;"> Employee ID Benefit Record Number 0 </div> <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> Plan Type 60 Flex Spending Medical </div> </div>
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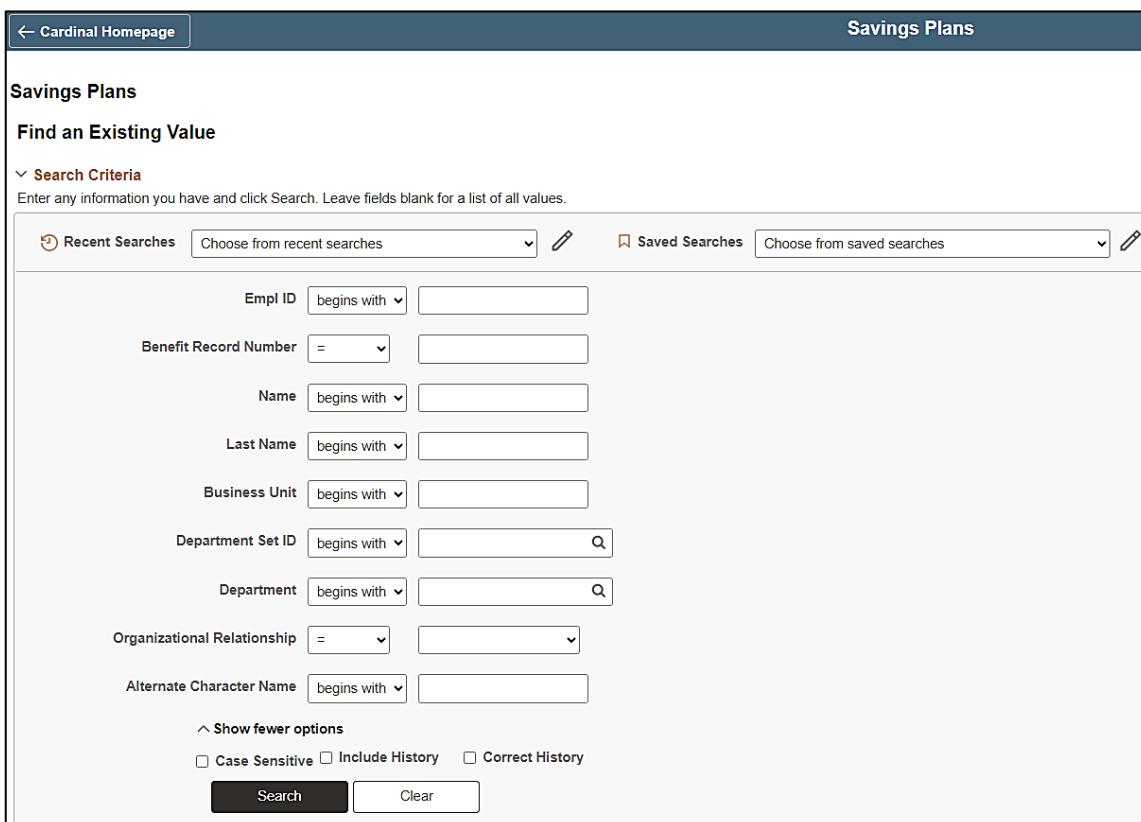
Reviewing the Savings Plans Page

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.

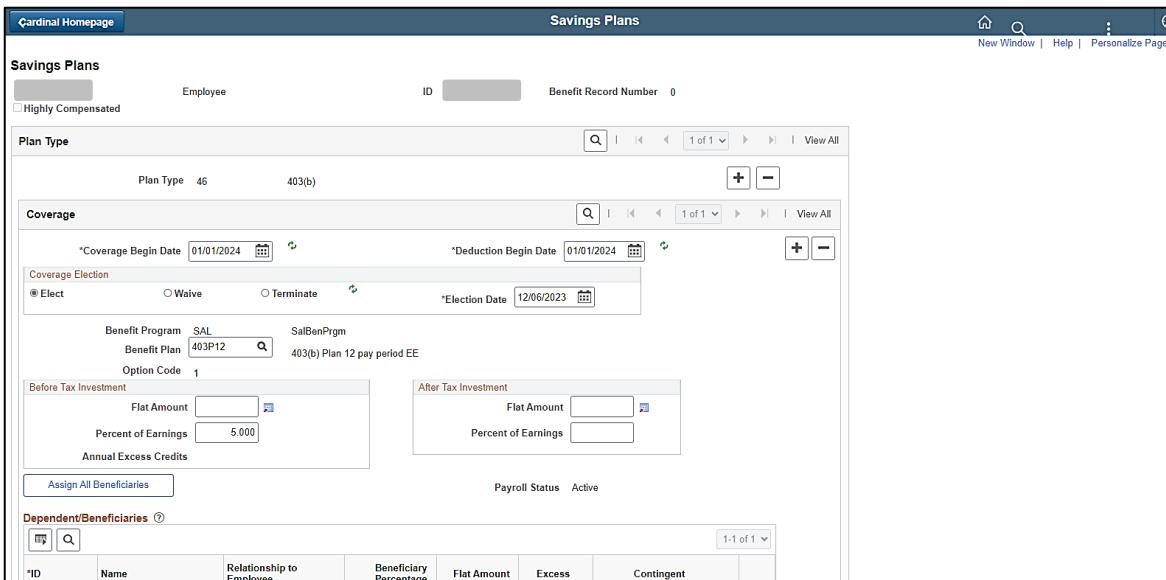


	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages . This Job Aid is located on the Cardinal website in Job Aids under Learning .
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Step	Action
2.	<p>Enter the employee's 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 style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Empl ID <input style="border: 1px solid #ccc; border-radius: 5px; padding: 2px 10px; margin-right: 10px;" type="button" value="begins with"/> <input style="border: 2px solid red; width: 150px; height: 20px;" type="text"/> </div>
3.	<p>Click the Include History checkbox.</p> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> <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 style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> <input style="background-color: #2e6b2e; color: white; border: 1px solid #2e6b2e; border-radius: 5px; padding: 5px; margin-right: 10px;" type="button" value="Search"/> <input style="border: 1px solid #ccc; border-radius: 5px; padding: 5px;" type="button" value="Clear"/> </div>

The **Savings Plans** page displays.



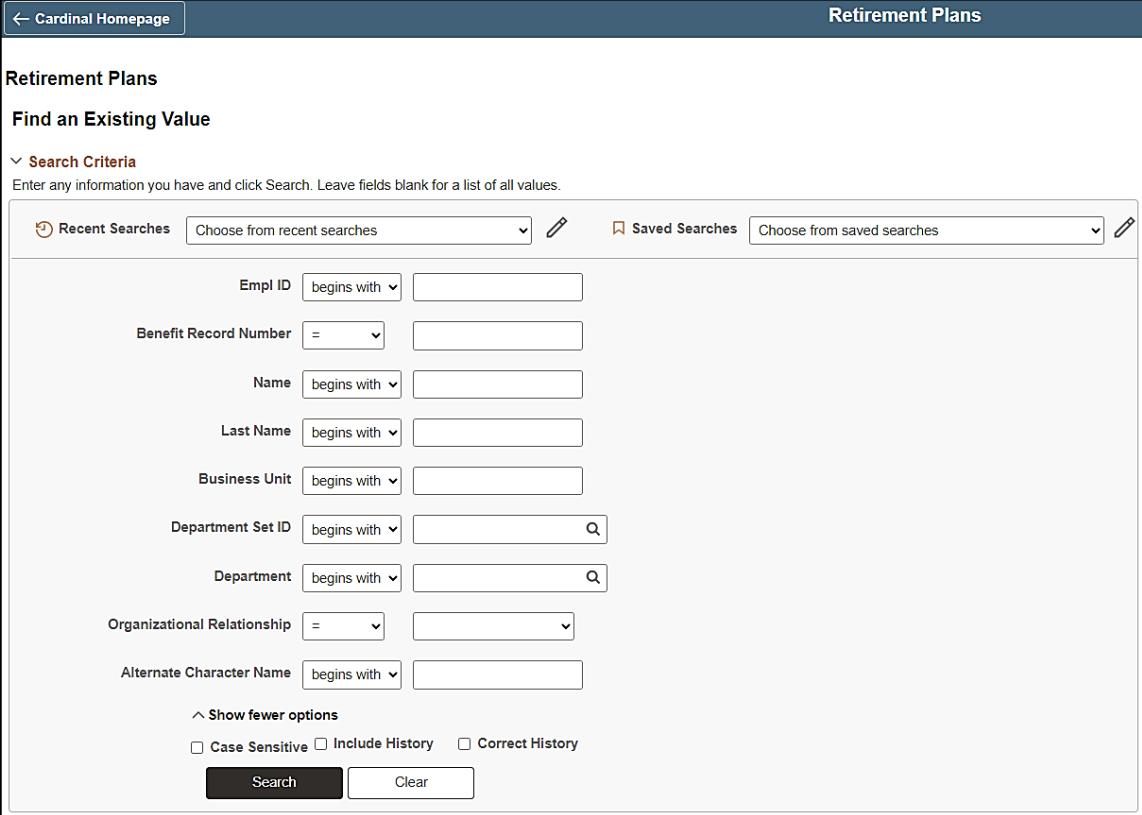
5.	<p>Click the View All link in order to see all of the enrollments and review the information as needed.</p> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block;"> Savings Plans <div style="display: flex; justify-content: space-between; align-items: center;"> <div style="flex: 1;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Employee</div> <input style="border: 1px solid #ccc; border-radius: 5px; width: 15px; height: 15px;" type="checkbox"/> Highly Compensated </div> <div style="flex: 1; text-align: right;"> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">ID</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">Benefit Record Number</div> <div style="border: 1px solid #ccc; padding: 2px; margin-bottom: 5px;">0</div> </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.

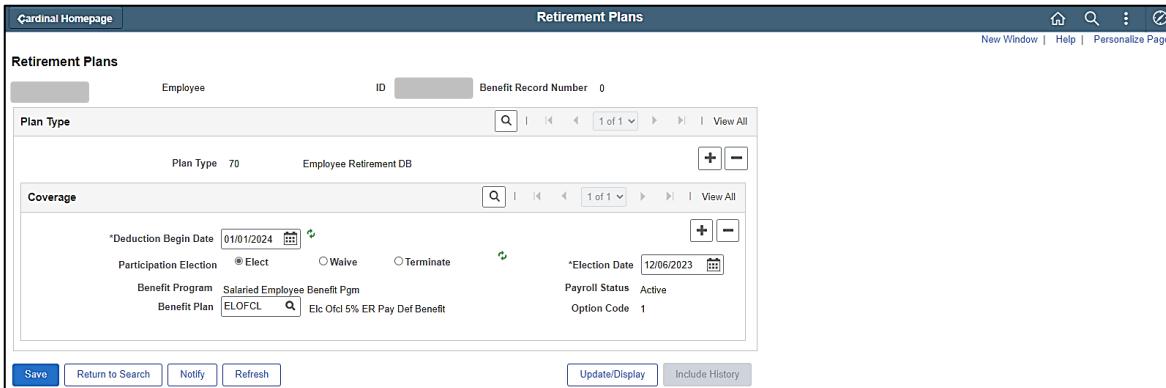
Note: Enrollments cannot be created or updated using this page. All enrollments and enrollment changes must be processed with a Benefit Event in Cardinal.

Step	Action
1.	<p>Navigate to the Retirement Plans page using the following path:</p> <p>NavBar > Menu > Benefits > Enroll in Benefits > Retirement Plans</p>
The Retirement Plans Find an Existing Value page displays.	
	
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>

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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 style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Empl ID <input style="border: 1px solid #ccc; padding: 2px; margin-right: 5px;" type="text" value="began with"/> <input style="border: 2px solid red; width: 150px; height: 30px;" type="text"/> </div>
3.	<p>Click the Include History checkbox.</p> <div style="border: 1px solid #ccc; padding: 5px; margin-top: 10px;"> <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 style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> <input style="background-color: #005a99; color: white; padding: 5px; margin-right: 10px;" type="button" value="Search"/> <input style="border: 1px solid #ccc; padding: 5px;" type="button" value="Clear"/> </div>

The **Retirement Plans** page displays.



The screenshot shows the 'Retirement Plans' page with a single enrollment record displayed. The record details are as follows:

- Employee:** [Redacted]
- ID:** [Redacted] **Benefit Record Number:** 0
- Plan Type:** 70 **Employee Retirement DB**
- Coverage:**
 - Deduction Begin Date:** 01/01/2024
 - Participation Election:** Elect Waive Terminate
 - Election Date:** 12/06/2023
 - Benefit Program:** Salaried Employee Benefit Pgm
 - Benefit Plan:** ELOFCL **Elc Ofcl 5% ER Pay Def Benefit**
 - Payroll Status:** Active
 - Option Code:** 1

At the bottom of the page 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 style="border: 1px solid #ccc; padding: 10px; margin-top: 10px;"> Retirement Plans <div style="display: flex; justify-content: space-between;"> Employee ID: [Redacted] Benefit Record Number: 0 </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Plan Type</th> <th>Employee Retirement DB</th> <th style="text-align: right;">View All</th> </tr> </thead> <tbody> <tr> <td>70</td> <td>Employee Retirement DB</td> <td style="text-align: right;"><input style="border: 2px solid red; padding: 2px;" type="button" value="View All"/></td> </tr> </tbody> </table> </div>	Plan Type	Employee Retirement DB	View All	70	Employee Retirement DB	<input style="border: 2px solid red; padding: 2px;" type="button" value="View All"/>
Plan Type	Employee Retirement DB	View All					
70	Employee Retirement DB	<input style="border: 2px solid red; padding: 2px;" type="button" value="View All"/>					

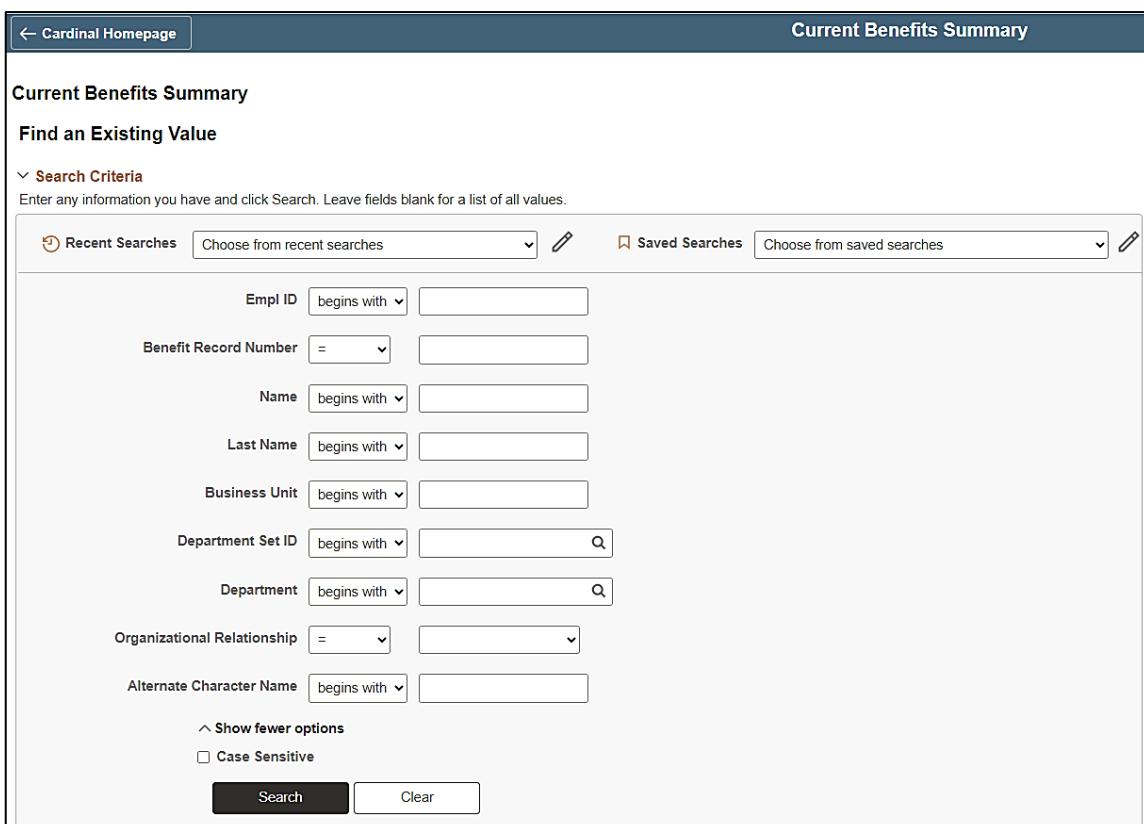
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Reviewing the Current Benefits Summary Page

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.

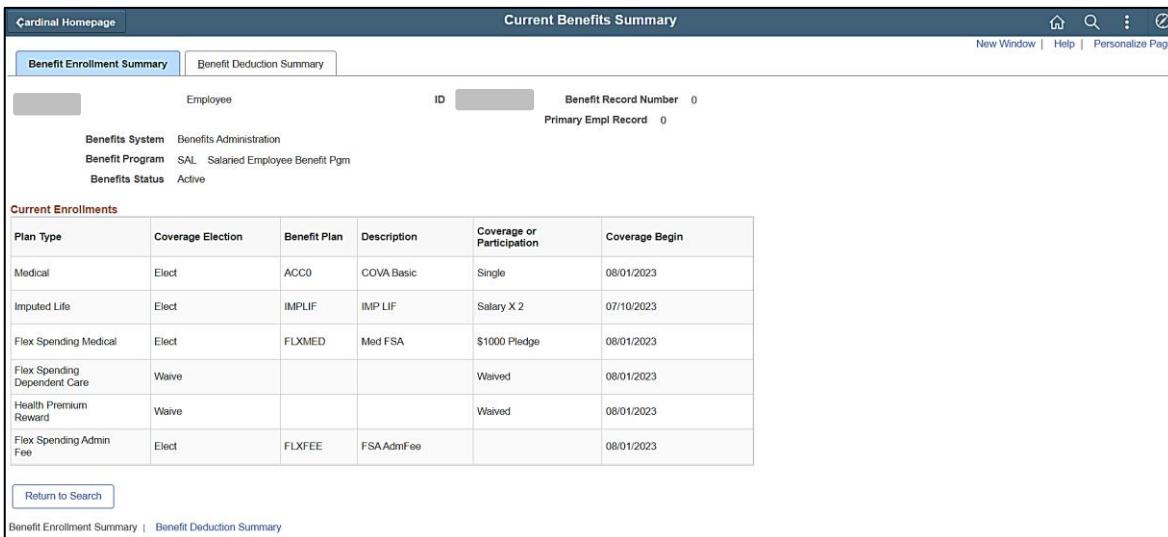


	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
2.	<p>Enter the employee's Employee ID in the Empl ID field.</p> <p>Note: Users can also search for the applicable employee using the various Name fields if the Employee ID is not known.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Empl ID begins with <input type="text"/> </div>

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Step	Action
3.	Click the Search button.

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



The screenshot shows the 'Current Benefits Summary' page. At the top, there are two tabs: 'Benefit Enrollment Summary' (which is highlighted in blue) and 'Benefit Deduction Summary'. Below the tabs, there is a search bar with a 'Search' button (which is highlighted with a red box) and a 'Clear' button. The main content area displays employee benefit enrollment information, including plan types, coverage elections, benefit plans, descriptions, coverage or participation, and coverage begin dates. At the bottom of the page, there is a 'Return to Search' button and a link to 'Benefit Enrollment Summary'.

4.	Review the information as needed.
5.	Click the Benefit Deduction Summary tab.

Benefit Enrollment Summary **Benefit Deduction Summary**

The **Benefit Deduction Summary** tab displays.



The screenshot shows the 'Current Benefits Summary' page. The 'Benefit Deduction Summary' tab is highlighted in blue. Below the tabs, there is a search bar with a 'Search' button and a 'Clear' button. The main content area displays employee benefit deduction information, including payroll system, pay group, payroll status, and payroll record number. At the bottom of the page, there is a 'Return to Search' button and a link to 'Benefit Deduction Summary'.

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