



NEW FEATURES PREVIEW

Benefits WorkCenter

February 5, 2026

www.cardinalproject.virginia.gov

Agenda

01

Welcome & Introductions

02

Upgrade Project Information

03

Session Objectives

04

Walkthrough & Demonstrations

05

Question & Answer

01

Welcome & Introductions

02

Upgrade Project Information

03

Session Objectives

04

Walkthrough & Demonstrations

05

Question & Answer

Meet the Team

Cardinal Team

- Sara Harrell
- Jill Racine
- Rob Ramey
- Marsha Adams
- Jay Kumar
- Leann Munn
- Jolene Christensen
- Kevin Ferwerda

Today's Presenters:



Sara Harrell

Presenter
BN Team Lead



Dana Smith

Facilitator
Change Leadership



Monica Kauffman

Facilitator
Change Leadership

01

Welcome & Introductions

02

Upgrade Project Information

03

Session Objectives

04

Walkthrough & Demonstrations

05

Question & Answer

What is the PUM Upgrade Project?

The Cardinal team is enhancing the Financials (FIN) and Human Capital Management (HCM) applications.

This upgrade will deliver a variety of new features aimed at improving both the user experience and overall system functionality, including:

WorkCenters

- Centralized tasks, reports, queries, and transactions.

PeopleSoft Insights

- A new tool for analytics, with embedded, visual data metrics

Foundation Upgrades

- A technical refresh of PeopleTools, ensuring a stable and high-performing system

1,400 + Enhancements

- New features designed to improve reporting and processing and refresh the user interface.

Refreshed Learning

- Comprehensive updates to all training materials to ensure a smooth transition for your teams.

Advantages of WorkCenters

WorkCenters serve as a centralized hub for users to access the key module components, tailored to the core user's responsibilities.

Primary advantages include:

- **Centralized Access:** Consolidates reports, queries, tasks, and relevant links into a single workspace.
- **Prioritize Workflows:** “My Work” transaction list highlighting where user action is needed. Refreshes on login or after page refresh.
- **Flexible Filtering:** filters and layouts allow users to sort and view only the most relevant transaction data.

01

Welcome & Introductions

02

Upgrade Project Information

03

Session Objectives

04

Walkthrough & Demonstrations

05

Question & Answer

Session Objectives

Purpose

First Look: An exclusive preview of new features in the Benefit module.

Input: Use your expertise to help the Cardinal team identify nuances in the user journey to ensure our support materials meet real-world needs.

Desired Outcomes

User-Ready Materials: Your insights will help inform our communication and training strategy, ensuring processes and challenges are addressed.

Engagement & Advocacy: Foster excitement and confidence by involving key agency subject matter experts who can carry the value of the new features back to their agencies with enthusiasm, increasing user adoption.

Making the Most of Our Time Together



Stay in the Zone

- Your focus helps us catch the small details that make a big difference.



Curiosity is Encouraged

- Ask questions. If you are thinking it, someone else probably is too.



Bring your Agency Perspective

- Be honest and open-minded. Your constructive feedback helps us build better training and communications.



Leave your Mark

- Complete the post-session survey, ensuring your agency's voice is officially captured in our planning.

01

Welcome & Introductions

02

Upgrade Project Information

03

Session Objectives

04

Walkthrough & Demonstrations

05

Question & Answer

Benefits WorkCenter

The **WorkCenter** is a central hub for BN core users that brings together items requiring attention and provides easy access to pages, queries, reports, and processes needed to perform BN related job functions.

My Work: Your “To-Do” list. Centralizes all items requiring immediate attention or action.

My Approvals: Dedicated queue for Life Event Documents or pending requests.

Links: Direct navigation to your most frequently visited day-to-day task pages.

Queries: Run BN (benefits) queries directly within the workspace.

Reports/Processes: Direct access to common BN reports and automated system processes.

The screenshot displays the Benefits WorkCenter interface. At the top, there is a header with a refresh icon and a settings gear icon. Below the header, the interface is organized into several sections:

- My Work:** A section containing a list of items. The first item is "Audit Exceptions" with a dropdown arrow. The second item is "Dependents Not Qualified" with a count of 16 in a green circle.
- My Approvals:** A section containing a list of items. The first item is "Benefits Approval" with a dropdown arrow. The second item is "Benefits Document Filing" with a count of 1 in a green circle. The third item is "Dependent Updates". The fourth item is "eBenefits Document Filing".
- Links:** A section containing a list of items. The first item is "Employee/Dependent Information" with a dropdown arrow. The second item is "Enroll in Benefits" with a dropdown arrow. The third item is "Enrollment Administration" with a dropdown arrow.
- Queries:** A section with a right-pointing arrow.
- Reports/Processes:** A section with a right-pointing arrow.

Submitting Life Event Documents via ESS

Document uploading will become a required step in the ESS Life Event sequence.

- Employees see a checklist of required documents specific to their Life Event, including upload and approval statuses.
- They select the document type and upload files directly from their device into ESS.
- Upon submission, the documents are in the Benefit Administrator's queue for review and approval.
- Coverage changes will not be processed until the Benefit Administrator approves.

Welcome to the Marriage Event

Marital Status Complete

Acknowledgement Complete

Benefit Summary Visited

Personal Information Not Started

Dependent/Beneficiary Info Not Started

Fluid Document Upload In Progress

Benefit Enrollment Not Started

Summary Visited

Fluid Document Upload

Event Value: Marriage

Instructions: You are required to submit the document(s) listed in the Document List. Select the Add Attachment button to upload your document.

Document	Upload / Status	Approval / Status
Marriage Certificate	Required Uploaded	Required Pending Approval
Social Security Card Copy	Required Attachment Missing	Not Required
Miscellaneous Documents Prior Year Tax Return Copy Utility Bill Copy Bank Statement	Require at least one Attachment Missing	Not Required

Add Document

*Document Type: Marriage Certificate

Add Attachment Add Note

View Document

View All

Document Name 1: Description 1: Do

Fluid Document Upload

Event Value: Marriage

Instructions: You are required to submit the document(s) listed in the Document List. Select the Add Attachment button to upload your document.

Document	Upload / Status	Approval / Status
Marriage Certificate	Required Uploaded	Required Pending Approval
Social Security Card Copy	Required Attachment Missing	Not Required
Miscellaneous Documents Prior Year Tax Return Copy Utility Bill Copy Bank Statement	Require at least one Attachment Missing	Not Required

Add Document

*Document Type: Marriage Certificate

Add Attachment Add Note

Benefits WorkCenter

My Approvals

- Review and approve all pending Life Event documents within this menu.
- Benefit enrollment is locked for the ESS user until document approval is complete.

Benefits Document Filing

Pending Approvals

Benefits Document Filing DENISE TALLEY Life Event Adoption Routed 01/23/2026 >

Approver Comments

Approve Deny 1 row

LIVE DEMONSTRATION

Benefits WorkCenter



01

Welcome & Introductions

02

Upgrade Project Information

03

Session Objectives

04

Walkthrough & Demonstrations

05

Question & Answer

PUM Upgrade – Agency Readiness



Key Agency Actions



Promote participation



Prepare teams



Provide feedback

Thank You

PRESENTATION CONCLUDED

We Value Your Feedback!

Please scan the QR code to complete a brief session survey.

Survey Link:

<https://forms.office.com/g/tYwugXbqv9>



A copy of this presentation will be sent to all attendees and invitees. The Teams recording is available immediately after the session.

www.cardinalproject.virginia.gov