

TLC and HBO Completing a New Hire and Benefit Enrollment Overview

This business process is applicable to both Health Benefits Only (HBO) Agencies and Localities in The Local Choice (TLC) Benefit Program.

This Job Aid provides a walkthrough of the steps required to complete a new hire processing and the benefit enrollments on behalf of the employee and assumes the employee submits a benefit enrollment form to the BA with all the information necessary to complete the process.

All required information must be entered using the tabs on the page or the transaction cannot be saved.

Ensure the job aid is followed carefully as entering incorrect or missing information in personal data fields will cause significant impact to downstream benefits processes. (e.g., Anthem, Aetna, and VRS).

A search is required using the **Search/Match** page before entering a new hire's personal data in Cardinal. The search is to prevent duplicate entries of the employee and uses the employee's SSN. If there is a match but only the employee's personal data is in Cardinal and not their job data, a new employment instance must be created to generate an employee record to use for the hire. Use the **Hiring a Person When Personal Data Exists in Cardinal** section of this Job Aid to process the hire.

Note: If a person's personal data already exists in Cardinal, be sure they are not actually a Rehire. If so, see the Job Aid titled **TLC and HBO Completing a Rehire and Benefit Enrollment**. This Job Aid can be found on the **Cardinal** website in **Job Aids** under **Learning** or on the [Locality Users](#) page.

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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HR and Benefits Job Aid

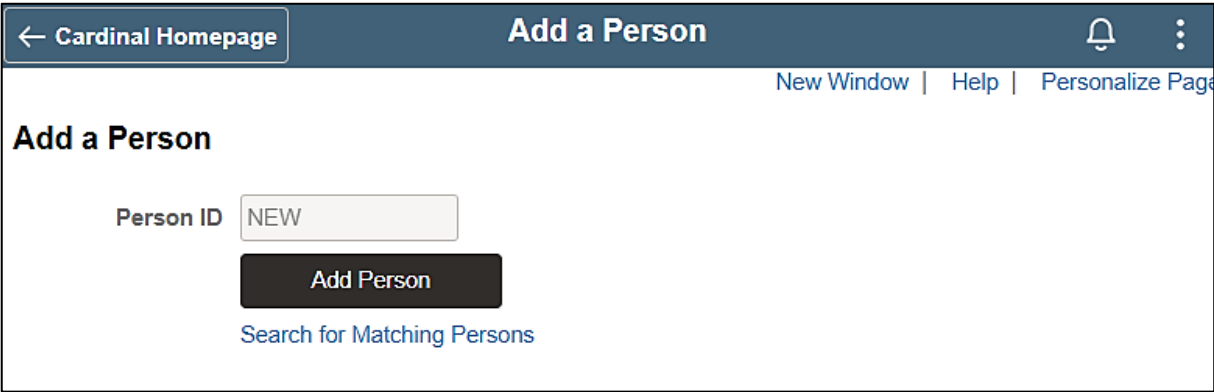
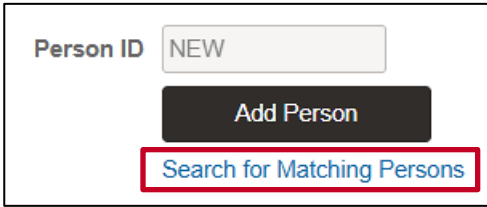
TLC and HBO Completing a New Hire and Benefit Enrollment

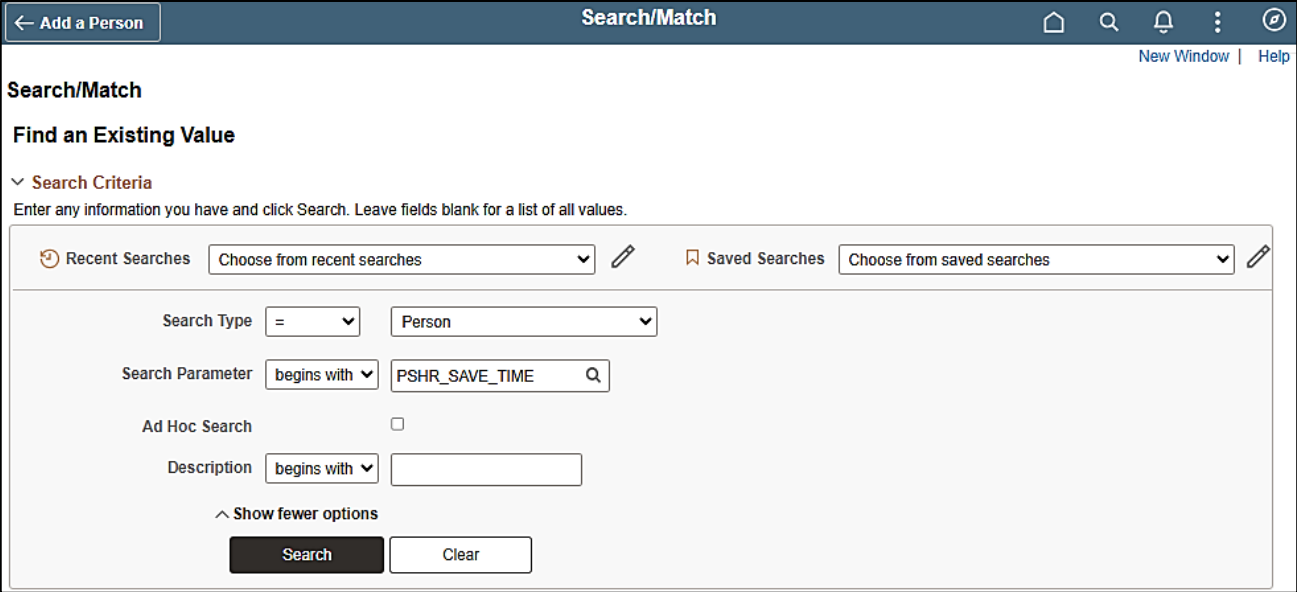


Revision History

Revision Date	Summary of Changes
4/14/2026	Baseline.

Completing a New Hire

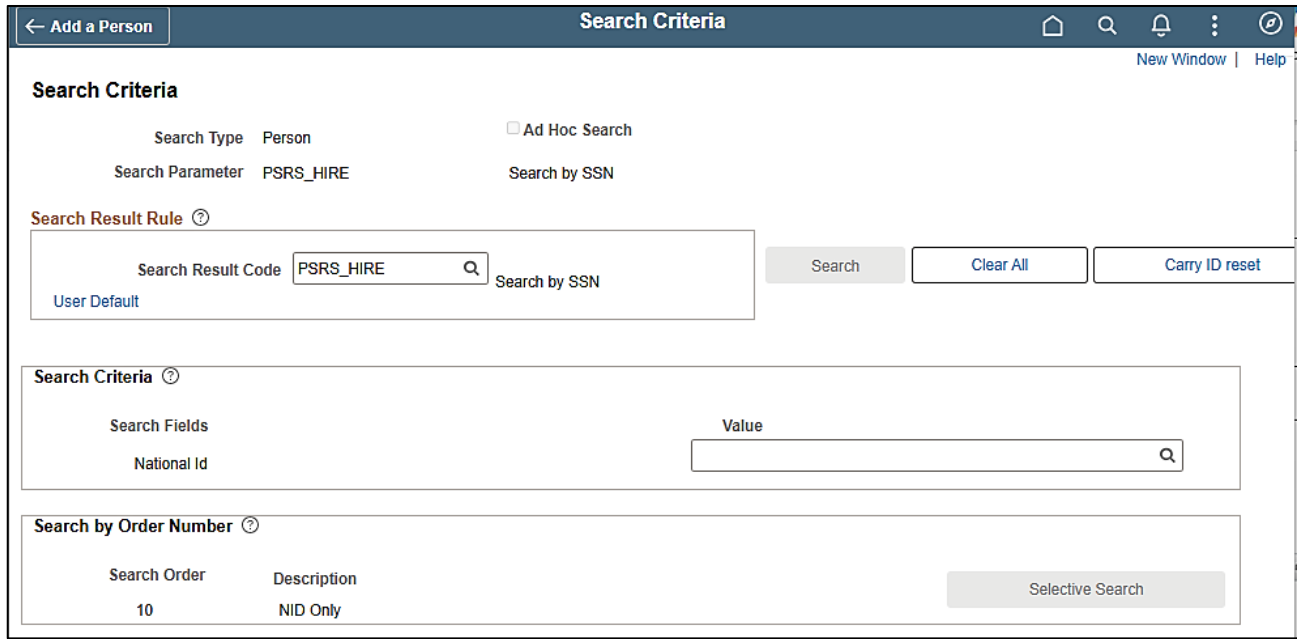
Before beginning, the applicable employee's Social Security Number (SSN) must be available for immediate reference. The Search/Match process is performed to validate that the new employee is not currently in the Cardinal system, or to obtain the existing Employee ID if the employee is already in the system.


Step	Action
1.	Navigate to the Add a Person page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Add a Person
<p>The Add a Person page displays.</p> 	
2.	Click the Search for Matching Persons link. 

Step	Action
	<p>The Search/Match page displays.</p> 
3.	<p>Click the Clear button.</p> 
4.	<p>Click the Search button.</p> 


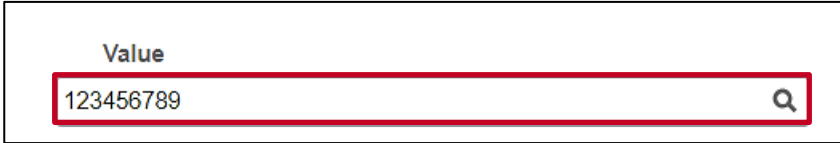
Step	Action
------	--------


The **Search Criteria** page displays.



5.	<p>Enter the employee's SSN into the Value field within the Search Criteria section.</p> 
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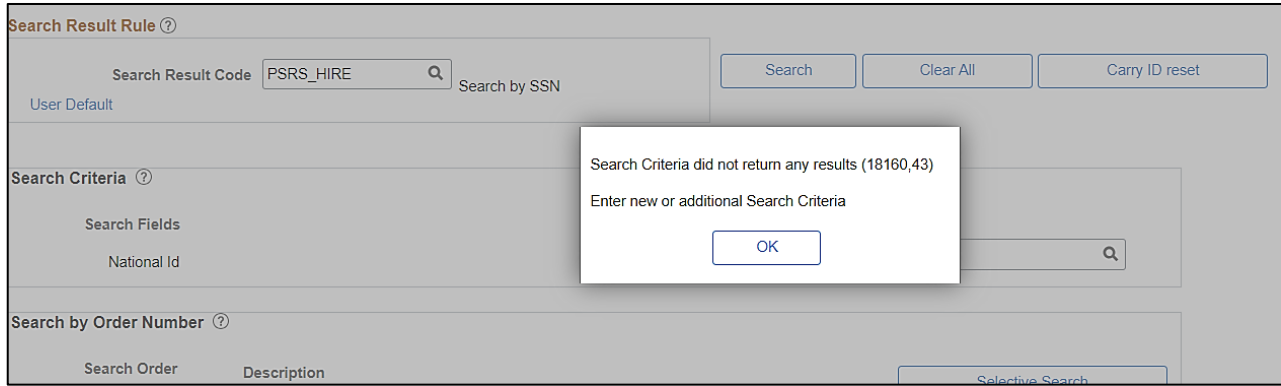
6.	<p>Press the Tab key on the keyboard to enable the Search button to the right of the Search Result Rule section.</p>
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	<p>The SSN is reformatted automatically (e.g., dashes are removed if they were entered).</p> 
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7.	<p>Click the Search button.</p> 
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Step	Action
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The **Search Criteria** results message displays in a pop-up window.



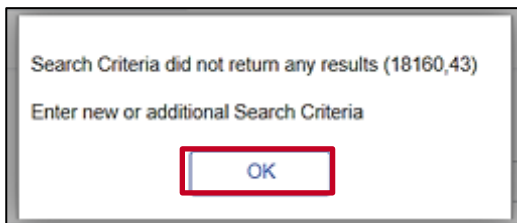
The above message displays when the employee's SSN is not in the Cardinal system. In these cases, proceed to the next Step.

If the system displays an Employee ID, the employee already exists in the Cardinal system. A bit of research, using the **Person Organizational Summary** page, is needed to determine how to proceed. If the person has never worked at the Commonwealth of Virginia, refer to the **Hiring a Person When Personal Data Exists in Cardinal** section of this Job Aid.

If the person has employment history, either a transfer or rehire should be completed as applicable.

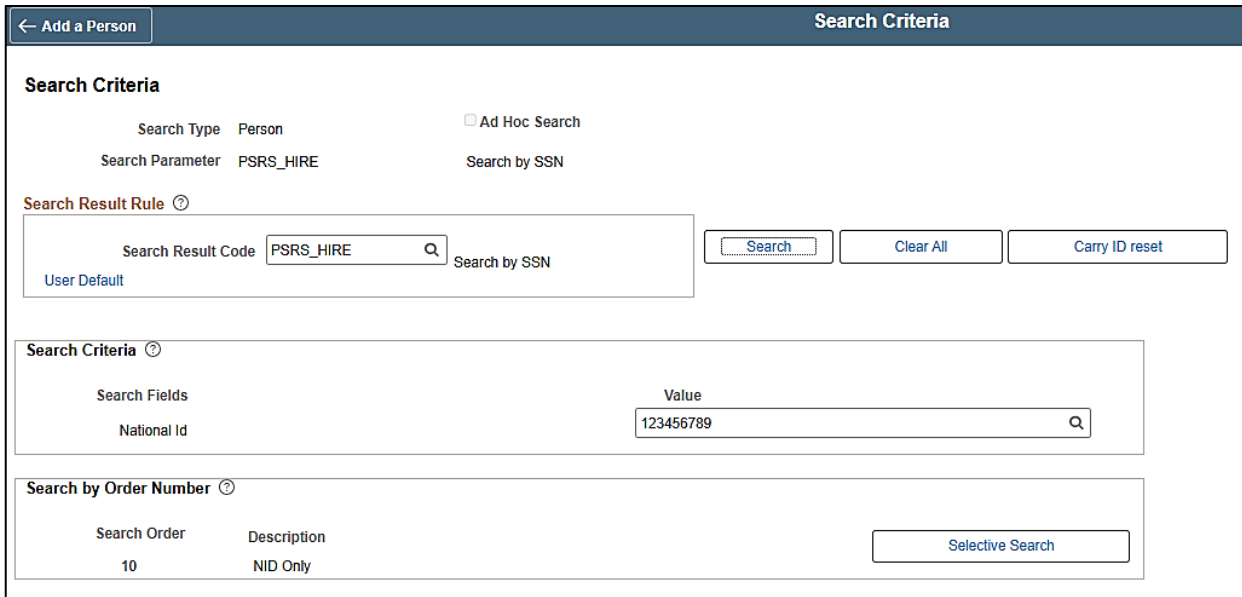
For further information on transferring existing employees, refer to the Job Aid titled **HR351 Completing an Inter-Agency Transfer**. For further information on rehiring employees, refer to the Job Aid titled **TLC HBO Completing a Rehire and Benefit Enrollment**. Both Job Aids are located on the **Cardinal** website in **Job Aids** under **Learning** or on the [Locality Users](#) page.

8. Click the **OK** button to close the Search Criteria message.



Step	Action
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The **Search Criteria** page redisplays.



The screenshot shows the 'Search Criteria' page with the following elements:

- Header: **← Add a Person** (left), **Search Criteria** (right)
- Search Criteria Section:
 - Search Type: Person
 - Search Parameter: PSRS_HIRE
 - Ad Hoc Search
 - Search by SSN
- Search Result Rule Section:
 - Search Result Code: PSRS_HIRE
 - Search by SSN
 - Buttons: Search, Clear All, Carry ID reset
- Search Criteria Section (expanded):
 - Search Fields: National Id
 - Value: 123456789
- Search by Order Number Section:
 - Search Order: 10
 - Description: NID Only
 - Button: Selective Search

9. Click the **Add a Person** button in the top left corner of the page.




This screenshot is identical to the previous one, but the **← Add a Person** button in the top left corner is highlighted with a red border.

The **Add a Person** page displays.



The screenshot shows the 'Add a Person' page with the following elements:

- Header: **← Cardinal Homepage** (left), **Add a Person** (center), notification and menu icons (right)
- Navigation: [New Window](#) | [Help](#) | [Personalize Page](#)
- Section: **Add a Person**
- Form:
 - Person ID: NEW
 - Button: Add Person
 - Text: [Search for Matching Persons](#)

Step	Action
	<p>The Person ID field defaults to “NEW”.</p> <div data-bbox="256 420 738 619"> <p>Person ID <input type="text" value="NEW"/></p> <p>Add Person</p> <p>Search for Matching Persons</p> </div>
10.	<p>Click the Add Person button.</p> <div data-bbox="256 703 738 913"> <p>Person ID <input type="text" value="NEW"/></p> <p>Add Person</p> <p>Search for Matching Persons</p> </div>

The **Modify a Person** page displays with the **Biographical Details** tab displayed by default.

← Add a Person
Modify a Person

Biographical Details
Contact Information
Regional
Organizational Relationships
VA Person Info

Person ID NEW

Name Q | < > | 1 of 1 | View All

*Effective Date

*Format Type

Display Name **Add Name**

Biographic Information

Date of Birth Years 0 Months 0

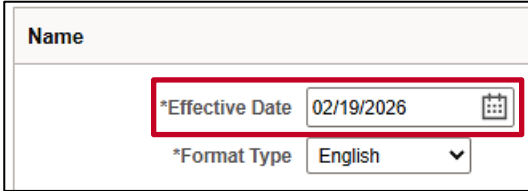

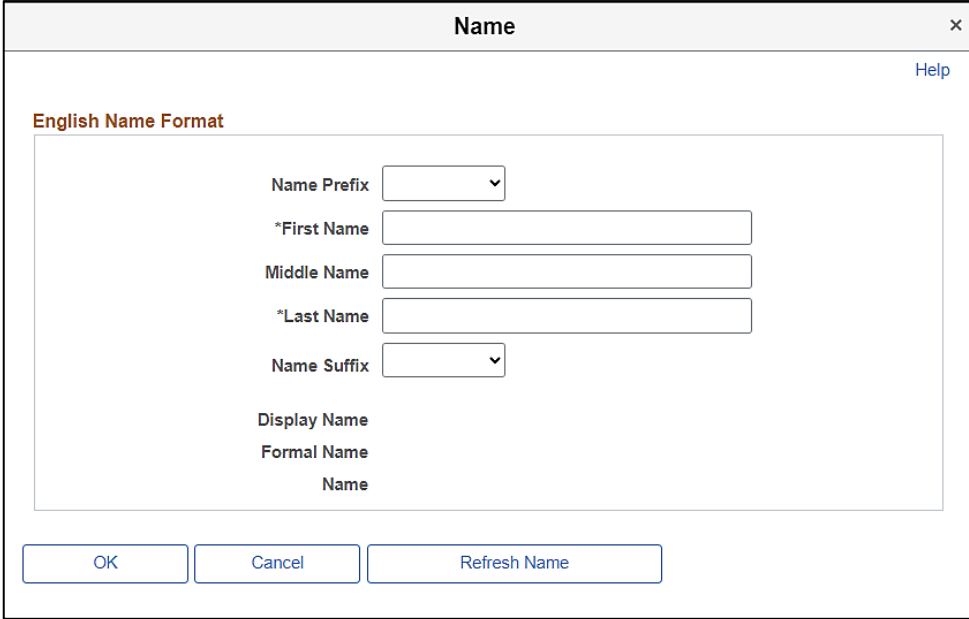

Birth Country United States






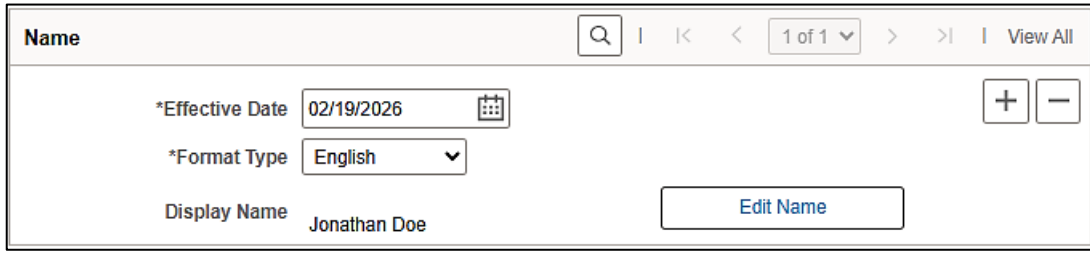
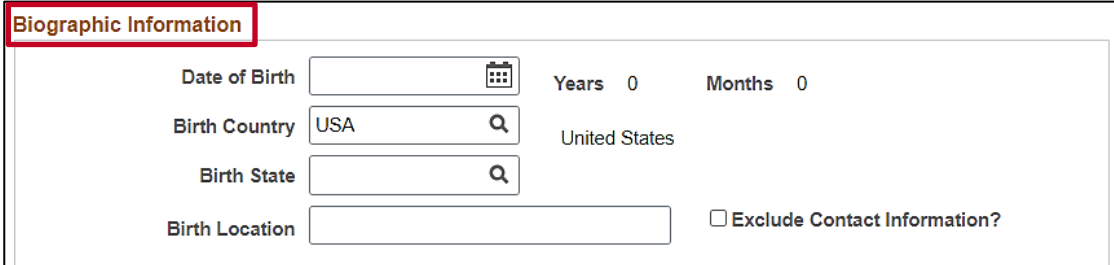
Birth State


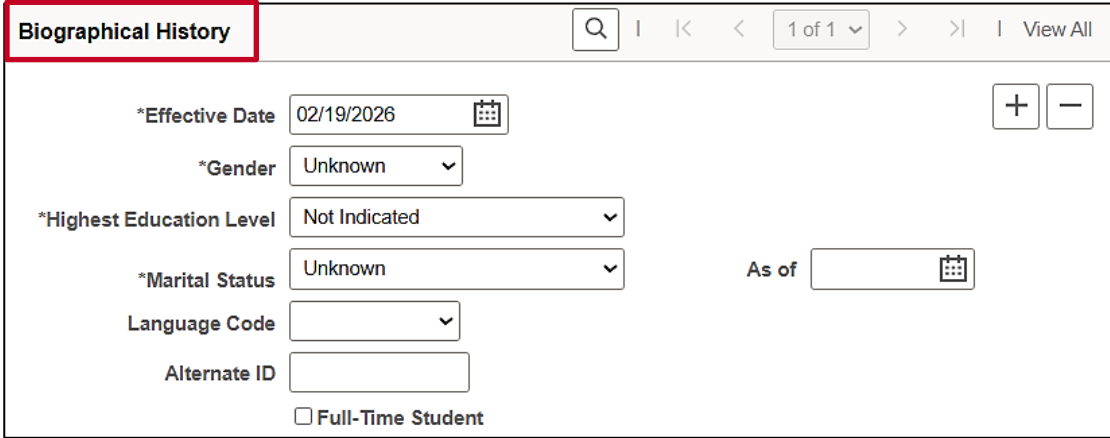

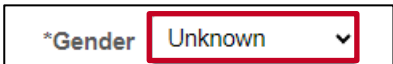

Birth Location Exclude Contact Information?


Biographical History Q | < > | 1 of 1 | View All

*Effective Date

Step	Action
11.	<p>The Effective Date field defaults to the current date. Update this date to the applicable date of the new hire as needed using the Effective Date Calendar icon.</p> 
12.	<p>The Effective Date cannot be greater than today's date when adding or modifying a person in Cardinal. For further information on Effective Dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
13.	<p>Click the Add Name button.</p> 
<p>The Name page displays in a pop-up window.</p> 	
14.	<p>Optionally, click the Name Prefix dropdown button and select the applicable prefix.</p> 

Step	Action
15.	Enter the employee's first name in the First Name field (required). 
16.	Optionally, enter the employee's middle name in the Middle Name field.
17.	Enter the employee's last name in the Last Name field (required). Note: Do not include suffixes (e.g., Jr, Sr, or IV) in the Last Name field. 
18.	Optionally, click the Name Suffix dropdown button and select the applicable suffix. 
	Do not use periods, hyphens, apostrophes, or any special characters in the name fields. For example, do not add a period behind the middle initial (i.e., enter John M Doe instead of John M. Doe).
19.	Click the OK button. 
The Biographical Details page refreshes with the Display Name field updated. 	
20.	Scroll down to the Biographic Information section. 

Step	Action
21.	<p>Click the Date of Birth Calendar icon and select the employee’s date of birth (required). Note: The Birth Country field defaults to “USA”. This can be updated but is not required as this data is not reported.</p> 
22.	<p>Scroll down to the Biographical History section.</p> 
	<p>The Effective Date field within this section defaults to the effective date selected above. Do not change.</p>
23.	<p>Click the Gender dropdown button and select the employee’s gender. Note: This field is a required field for benefits and the employee’s legal gender must be provided.</p> 
24.	<p>Click the Highest Education Level dropdown button and select the employee’s highest level of education (required).</p> 

Step	Action												
25.	<p>Click the Marital Status dropdown button and select the employee's legal marital status.</p> <p>Note: This field is required for benefits purposes and prevents errors from being reported on audit reports.</p> <div data-bbox="256 501 883 569" style="border: 1px solid black; padding: 5px;"> *Marital Status Unknown </div>												
26.	<p>Click the As of Calendar icon and select the date that the Marital Status is entered for the new hire.</p> <p>Note: This can be the date of hire.</p> <div data-bbox="256 737 574 833" style="border: 1px solid black; padding: 5px;"> As of [Calendar Icon] </div>												
	<p>The Language Code, Alternate ID, and Full-Time Student fields are not currently tracked or used in Cardinal.</p>												
27.	<p>Scroll down to the National ID section.</p> <div data-bbox="256 1031 1463 1257" style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid red; padding: 2px; margin-bottom: 5px;"> ▼ National ID </div> <div style="border: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> 🗃️ 🔍 ⏪ < 1-1 of 1 > ⏩ View All </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">*Country</th> <th style="width: 20%;">*National ID Type</th> <th style="width: 30%;">National ID</th> <th style="width: 15%;">Primary ID</th> <th style="width: 10%;"></th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td>USA 🔍</td> <td>Social Security Number ▼</td> <td></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> </div> </div>	*Country	*National ID Type	National ID	Primary ID			USA 🔍	Social Security Number ▼		<input checked="" type="checkbox"/>	+	-
*Country	*National ID Type	National ID	Primary ID										
USA 🔍	Social Security Number ▼		<input checked="" type="checkbox"/>	+	-								
28.	<p>Enter the employee's Social Security Number (SSN) in the National ID field.</p> <div data-bbox="256 1346 1349 1562" style="border: 1px solid black; padding: 5px;"> <div style="border: 1px solid gray; padding: 5px;"> <div style="border: 1px solid gray; padding: 2px; margin-bottom: 5px;"> ▼ National ID </div> <div style="border: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between; align-items: center;"> 🗃️ 🔍 ⏪ < 1-1 of 1 > ⏩ View All </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">*Country</th> <th style="width: 20%;">*National ID Type</th> <th style="width: 30%;">National ID</th> <th style="width: 15%;">Primary ID</th> <th style="width: 10%;"></th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td>USA 🔍</td> <td>Social Security Number ▼</td> <td style="border: 1px solid red;"></td> <td style="text-align: center;"><input checked="" type="checkbox"/></td> <td style="text-align: center;">+</td> <td style="text-align: center;">-</td> </tr> </tbody> </table> </div> </div> </div>	*Country	*National ID Type	National ID	Primary ID			USA 🔍	Social Security Number ▼		<input checked="" type="checkbox"/>	+	-
*Country	*National ID Type	National ID	Primary ID										
USA 🔍	Social Security Number ▼		<input checked="" type="checkbox"/>	+	-								



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
29.	<p>Scroll back up to the top of the page and click the Contact Information tab.</p> <div style="border: 1px solid #ccc; padding: 10px;"> <div style="background-color: #2c4e64; color: white; padding: 5px; display: flex; justify-content: space-between;"> ← Add a Person Modify a Person </div> <div style="padding: 10px;"> <p style="margin: 0;"> Biographical Details Contact Information Regional Organizational Relationships VA Person Info </p> <hr/> <p style="margin: 0;"> Jonathon Doe Person ID NEW </p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p style="margin: 0;"> Name 1 of 1 View All </p> <p style="margin: 5px 0;"> *Effective Date 02/19/2026 + - </p> <p style="margin: 5px 0;"> *Format Type English </p> <p style="margin: 5px 0;"> Display Name Jonathon Doe Edit Name </p> </div> <p style="margin: 5px 0; font-size: small; color: #800000;">Biographic Information</p> </div> </div>

The **Contact Information** page displays.

Biographical Details
Contact Information
Regional
Organizational Relationships
VA Person Info

Jonathon Doe
Empl ID NEW

Current Addresses


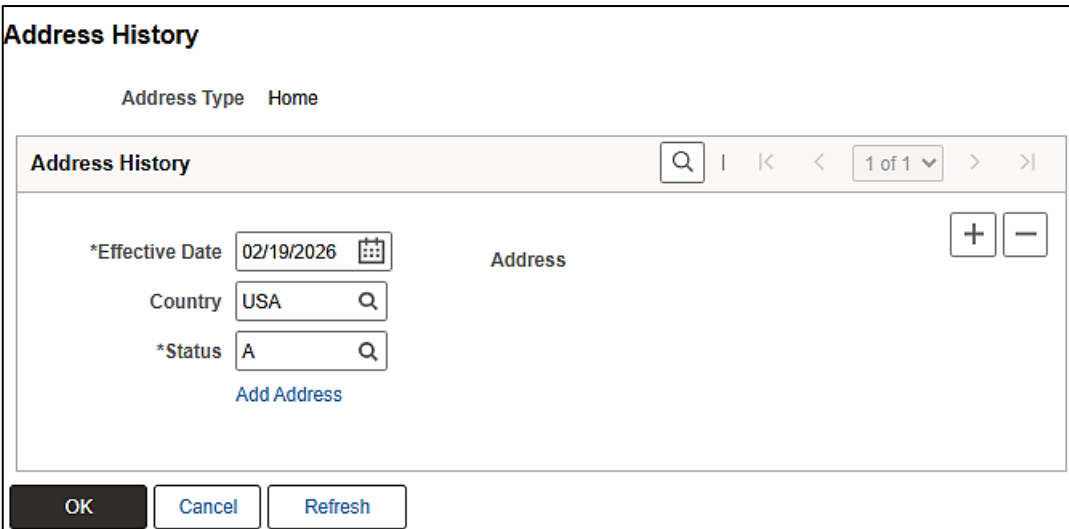

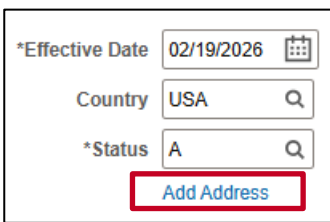
🗕 🔍
|< < 1-1 of 1 > >| View All


Address Type	As Of Date	Status	Address		
Home	02/19/2026	A		Add Address Detail	+ -

Phone Information

🗕 🔍
|< < 1-1 of 1 > >| View All

*Phone Type	Telephone	Extension	Preferred		
▼			☐	+	-

Step	Action												
30.	<p>Click the Add Address Detail link.</p>  <p>The Current Addresses table shows one entry:</p> <table border="1" data-bbox="259 504 1453 630"> <thead> <tr> <th>Address Type</th> <th>As Of Date</th> <th>Status</th> <th>Address</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Home</td> <td>02/19/2026</td> <td>A</td> <td></td> <td>Add Address Detail</td> <td>+ -</td> </tr> </tbody> </table>	Address Type	As Of Date	Status	Address			Home	02/19/2026	A		Add Address Detail	+ -
Address Type	As Of Date	Status	Address										
Home	02/19/2026	A		Add Address Detail	+ -								
	<p>The Address History page displays.</p>  <p>The Address History form displays the following fields:</p> <ul style="list-style-type: none"> Address Type: Home *Effective Date: 02/19/2026 Country: USA *Status: A Address: (empty) <p>Buttons: Add Address, OK, Cancel, Refresh</p>												
	<p>An Address Type of “Home” is required for healthcare extract file requirements. If the mailing address and the home address are the same, only enter the home address. Do not duplicate the same address information.</p>												
31.	<p>Click the Add Address link.</p>  <p>The Address History form displays the following fields:</p> <ul style="list-style-type: none"> *Effective Date: 02/19/2026 Country: USA *Status: A Add Address (highlighted) 												

Step	Action
	<p>The Edit Address page displays.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <p>Edit Address</p> <p>Country United States</p> <p>Address 1 <input type="text"/></p> <p>Address 2 <input type="text"/></p> <p>Address 3 <input type="text"/></p> <p>City <input type="text"/> State <input type="text" value="Q"/></p> <p>Postal <input type="text"/></p> <p>County <input type="text"/></p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div>
32.	Enter the employee's address information using the applicable fields.
	<p>The Address 1, City, State, and Postal are required fields. The employee's personal data cannot be saved if any of these fields are blank.</p> <p>Note: Do not use special characters in the address fields.</p>
33.	Click the OK button.
	<div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: center; gap: 20px;"> <div style="border: 2px solid red; padding: 5px 15px;">OK</div> <div style="border: 1px solid blue; padding: 5px 15px;">Cancel</div> </div> </div>



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **Address History** page refreshes with the employee's address information displayed.

Address History

Address Type Home

Address History 1 of 1

*Effective Date Address
Richmond, VA 12345

Country

*Status

[Add Address](#)

34.	Click the OK button.
-----	-----------------------------

The **Contact Information** page redisplay.

Biographical Details **Contact Information** Regional Organizational Relationships VA Person Info

Jonathan Doe Empl ID NEW

Current Addresses

1-1 of 1 View All

Address Type	As Of Date	Status	Address		
Home	02/19/2026	A	123 Main St Richmond, VA 12345	Edit/View Address Detail	<input type="button" value="+"/> <input type="button" value="-"/>


Phone Information


1-1 of 1 View All

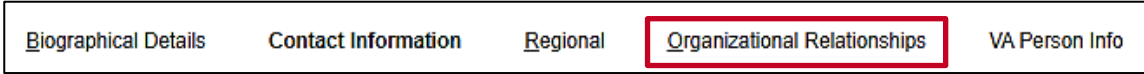
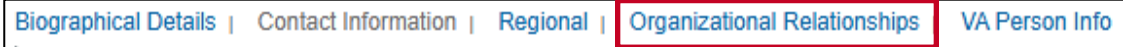
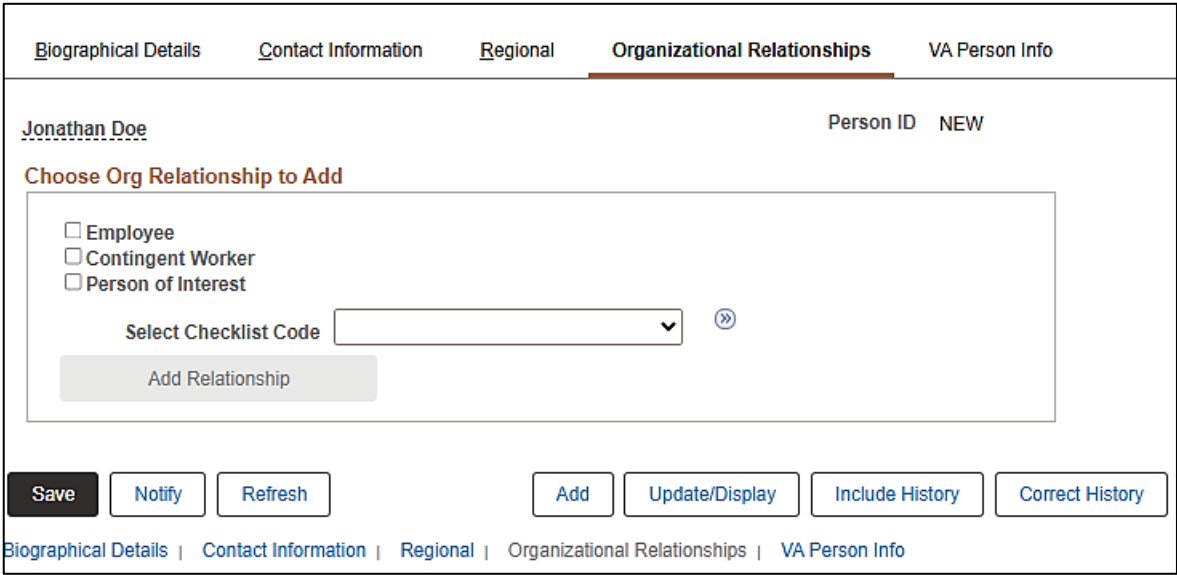


*Phone Type	Telephone	Extension	Preferred		
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="button" value="+"/>	<input type="button" value="-"/>


Email Option Selection

Agency Provided Email
 Pending Agency Provided Email
 Employee Provided Email

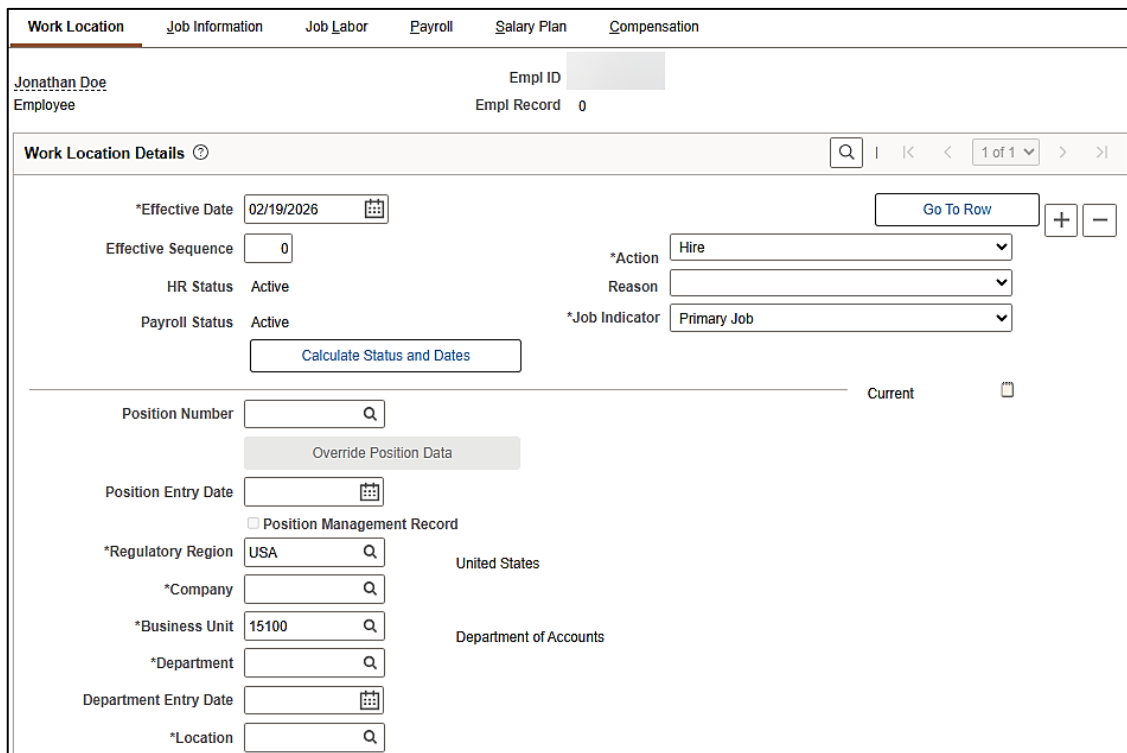
Step	Action												
35.	<p>Click the Phone Type dropdown button and select the type of phone.</p> <table border="1"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>..</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Phone Type	Telephone	Extension	Preferred			..			<input type="checkbox"/>	+	-
*Phone Type	Telephone	Extension	Preferred										
..			<input type="checkbox"/>	+	-								
36.	<p>Enter the applicable telephone number in the Telephone field.</p> <table border="1"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td></td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Phone Type	Telephone	Extension	Preferred			Business			<input type="checkbox"/>	+	-
*Phone Type	Telephone	Extension	Preferred										
Business			<input type="checkbox"/>	+	-								
	<p>It is not necessary to enter dashes. When tabbing out of the field, the appropriate phone number format will auto-populate.</p>												
37.	<p>Click the Preferred checkbox option to identify the employee's preferred phone number.</p> <table border="1"> <thead> <tr> <th>*Phone Type</th> <th>Telephone</th> <th>Extension</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td>Business</td> <td>555/555-5555</td> <td></td> <td><input checked="" type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table>	*Phone Type	Telephone	Extension	Preferred			Business	555/555-5555		<input checked="" type="checkbox"/>	+	-
*Phone Type	Telephone	Extension	Preferred										
Business	555/555-5555		<input checked="" type="checkbox"/>	+	-								
38.	<p>Add additional phone numbers for the employee as needed by clicking the Add a New Row icon (+) and then repeating Steps 35 – 37.</p>												
39.	<p>Scroll down to the Email Option Selection and Email Addresses sections.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Email Option Selection</p> <p> <input checked="" type="radio"/> Agency Provided Email <input type="radio"/> Pending Agency Provided Email <input type="radio"/> Employee Provided Email </p> <p> 1. Agency Provided Email and Employee Provided Email must be a valid email address that is unique to the employee, except: 2. When no email address is available, select applicable email option and ALWAYS use noemail@virginia.gov </p> <p>Email Addresses</p> <table border="1"> <thead> <tr> <th>*Email Type</th> <th>*Email Address</th> <th>Preferred</th> <th></th> <th></th> </tr> </thead> <tbody> <tr> <td></td> <td></td> <td><input type="checkbox"/></td> <td>+</td> <td>-</td> </tr> </tbody> </table> </div>	*Email Type	*Email Address	Preferred					<input type="checkbox"/>	+	-		
*Email Type	*Email Address	Preferred											
		<input type="checkbox"/>	+	-									

Step	Action
40.	<p>Complete these sections based on the following guidelines:</p> <ol style="list-style-type: none"> a. If the employee has been issued a business email: <ol style="list-style-type: none"> i. Accept the default email option of Agency Provided Email ii. Click the Email Type dropdown button and select “Business” iii. Enter the email address in the Email Address field iv. Select the Preferred checkbox option v. Notify the employee of their email address and provide information to register for Cardinal Employee Self Service (ESS) using this email (ESS applies to HBO Agencies only) b. If the employee’s business email has been requested, but not yet assigned or the employee chooses not to provide a personal email: <ol style="list-style-type: none"> i. Click the Pending Agency Provided Email option ii. Click Email Type dropdown button and select “Business” iii. Enter “noemail@virginia.gov” in the Email Address field iv. Select the Preferred checkbox option c. If a business email will not be provided to the employee: <ol style="list-style-type: none"> i. Click the Employee Provided Email option ii. Click the Email Type dropdown button and select “Personal” iii. Enter the email address in the Email Address field iv. Select the Preferred checkbox option
	<p>Once the employee’s business email is obtained, the Pending Agency Provided Email address must be replaced with the new business email address. The email address must be provided to the employee as they will need it to register and access Cardinal Employee Self-Services (ESS). If this is not updated, the employee will not be able to register for access to Cardinal ESS. (ESS applies to HBO Agencies only)</p> <p>Note: For employees with multiple jobs at different Agencies, the business email must match the Agency of their primary job.</p> <ul style="list-style-type: none"> • If an employee has both an hourly (wage) and a salaried job, the salaried job will always be the primary job • If an employee has multiple hourly jobs, the oldest job is considered primary <p>For further information on updating email addresses, refer to the Job Aid titled HR351 Viewing and Modifying Personal Data. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>

Step	Action
41.	<p>Click the Organizational Relationships tab at the top of the page, or the link at the bottom of the page.</p>  
	<p>The Organizational Relationships page displays.</p> 
42.	<p>Select the Employee checkbox option.</p> <p>Note: The Select Checklist Code field automatically updates with the “Hire” list item after selecting the Employee checkbox option.</p> 
43.	<p>Click the Add Relationship button.</p> 


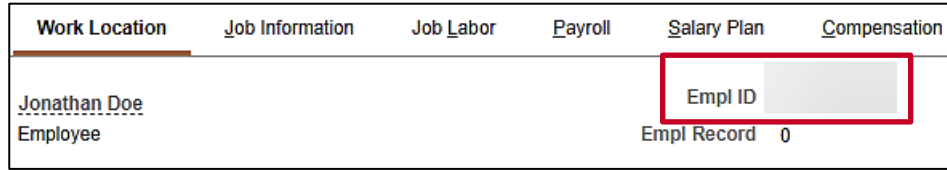
Step	Action
	<p>This is the step where information entered for the employee's personal data is validated. If there is any missing required information, Cardinal will generate an alert at this point.</p> <div style="border: 2px solid red; padding: 5px;"> <p>Do not click the Back button in the browser to go back, as all information that has been entered will be lost.</p> </div> <p>Review the message and go to the tab where the missing information is captured and enter it. Once the missing information is entered, return to the Organizational Relationships tab and click the Add Relationship button again.</p>




The new employee's **Job Record** page displays with the **Work Location** tab displayed by default.



The screenshot shows the 'Work Location' tab selected. At the top, the employee's name 'Jonathan Doe' and 'Employee' are displayed. To the right, the 'Empl ID' is shown in a greyed-out box, and 'Empl Record' is set to '0'. Below this is a 'Work Location Details' section with a search icon and navigation arrows. The details include:

- *Effective Date: 02/19/2026
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire
- Reason: (empty dropdown)
- *Job Indicator: Primary Job
- Position Number: (empty search field)
- Position Entry Date: (empty date picker)
- *Regulatory Region: USA (United States)
- *Company: (empty search field)
- *Business Unit: 15100 (Department of Accounts)
- *Department: (empty search field)
- Department Entry Date: (empty date picker)
- *Location: (empty search field)

	<p>Cardinal will auto-assign the Employee ID Number. It is located at the top of the Work Location tab. Take note of the assigned Empl ID Number for the employee.</p> 
---	---

Step	Action
	<p>The Effective Date field defaults to the date entered on the Personal Information page. If this date is not the first date of employment for the employee, it can be updated now.</p> <p>A help desk ticket is required to adjust the new employee’s effective date after their Job Record is saved. For further information on Effective Dating, see the Job Aid titled HR351 Overview of Effective Dating. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
44.	<p>The Action field defaults to “Hire” and no other selections are available.</p> <div data-bbox="256 667 912 835" style="border: 1px solid #ccc; padding: 5px;"> <p>*Action <input type="text" value="Hire"/></p> <p>Reason <input type="text"/></p> <p>*Job Indicator <input type="text" value="Primary Job"/></p> </div>
45.	<p>Click the Reason dropdown button and select “New Hire”.</p> <div data-bbox="256 928 912 1087" style="border: 1px solid #ccc; padding: 5px;"> <p>*Action <input type="text" value="Hire"/></p> <p>Reason <input type="text" value="New Hire"/></p> <p>*Job Indicator <input type="text" value="Primary Job"/></p> </div>
	<p>If processing an Inter-Agency Transfer for the employee, use the applicable Transfer In (XXX) Reason code. For further information on Inter-Agency Transfers, see the Job Aid titled HR351 Managing an Inter-Agency Transfer. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
	<p>Users may see a notification message displayed in a pop-up window. In this case, review the message, confirm the effective date is correct, and then click the OK button.</p> <div data-bbox="256 1375 1328 1612" style="border: 1px solid #ccc; padding: 10px;"> <p>Confirm that the effective date matches the Job Begin Date on the New Hire paperwork. (25101,146)</p> <p>Confirm that the effective date matches the Job Begin Date on the New Hire paperwork. Otherwise, correction by the Cardinal PPS Team would be required</p> <p style="text-align: center;"><input type="button" value="OK"/></p> </div>
46.	<p>Click the Position Number Look up icon and select the applicable pooled position for the employee.</p> <div data-bbox="256 1732 722 1801" style="border: 1px solid #ccc; padding: 5px;"> <p>Position Number <input type="text" value=""/> <input type="button" value="Q"/></p> </div>



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
------	--------

The **Work Location** page refreshes and the remaining position related fields on this page auto-populate.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Jonathan Doe Empl ID [REDACTED]
Employee Empl Record 0

Work Location Details ☺
🔍 | |< < 1 of 1 > >|

*Effective Date 📅

Effective Sequence

HR Status Active

Payroll Status Active

[Go To Row](#)

*Action

Reason

*Job Indicator

Position Number 🔍

Override Position Data

Position Entry Date

Position Management Record

Regulatory Region USA United States

Company A01 Lee County - DSS

Business Unit LOCAL The Local Choice Participants

Department 047001000 Lee County - DSS

Department Entry Date

Location DHRM Office of Health Benefits

Establishment ID 🔍 Localities

Current 📅

TLC 047001000 Full Time Pos

Date Created 02/20/2026

47.	Click the Job Information tab.
-----	---------------------------------------

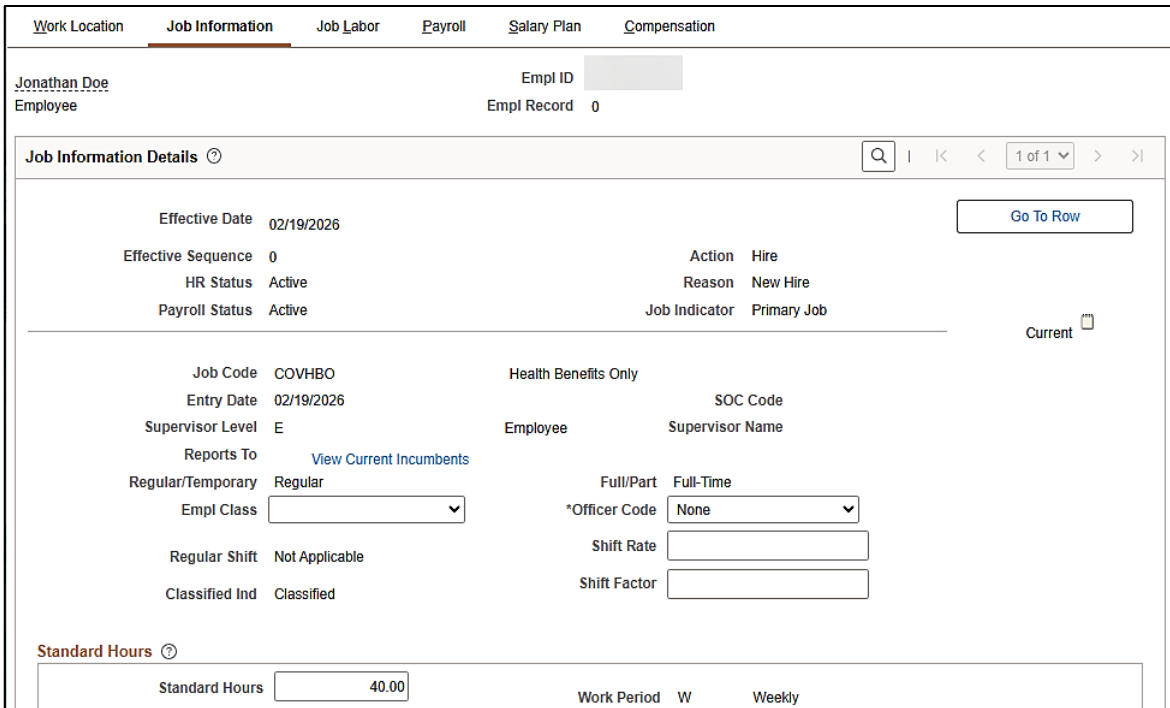
Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Rev 4/14/2026

Page 23 of 64

Step	Action
------	--------


The **Job Information** page displays.




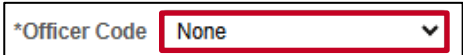
48. Review the information within the **Job Information Details** section. These values are populated when the Position Number is selected on the **Work Location** tab.

49. Click the **Empl Class** dropdown button and select the applicable Employee Class. This is a required field.

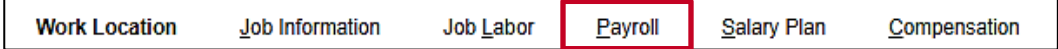
- If the employee is assigned to a TLC position, select the “TLC EE” value
- If the employee is assigned to an HBO position, select the value that describes the employee filling the job (e.g., ONC, OTO, etc.)



 The **Officer Code** field defaults to “None”. Do not change.



50. The **Job Labor** tab is not utilized in Cardinal. Click the **Payroll** tab.



Step	Action
------	--------

The **Payroll** page displays.

Work Location
Job Information
Job Labor
Payroll
Salary Plan
Compensation

Jonathan Doe
Employee
Empl ID
Empl Record 0

Payroll Information 1 of 1

Effective Date 02/19/2026
Go To Row

Effective Sequence 0
Action Hire

HR Status Active
Reason New Hire

Payroll Status Active
Job Indicator Primary Job

Current

*Payroll System Payroll for North America

Absence System Other

Payroll for North America

Pay Group

Holiday Schedule

Employee Type

FICA Status Exempt

Tax Location Code

[Edit ChartFields](#)

GL Pay Type

Combination Code

i

The **Payroll System** field defaults to "Payroll for North America". Do not change.

The **Absence System** field defaults to "Other". Do not change.

*Payroll System
Payroll for North America

Absence System
Other

51. Click the **Pay Group Look up** icon within **Payroll for North America** section and select "MNP" – Non-Payroll.

Payroll for North America
?

Pay Group
MNP
?

i

The **Employee Type** field defaults to "S" (Salaried). Do not change.

The **Holiday Schedule** field defaults to "NOHOL". Do not change.

Pay Group
MNP
Non-Payroll


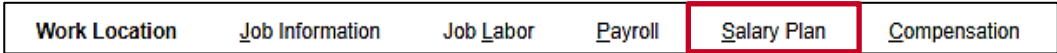
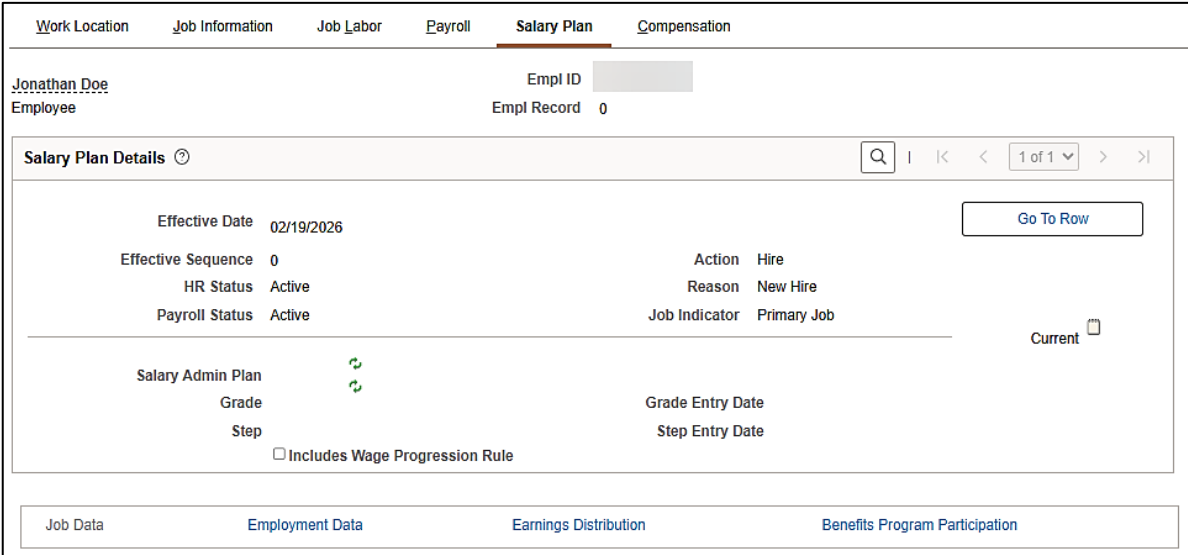
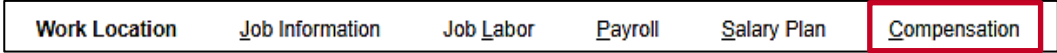
Employee Type
S
Salaried

Holiday Schedule
NOHOL
LOCALITY



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
52.	<p>Click the Tax Location Code Look up icon and select the applicable code based on the location of the employee's office.</p> 
53.	<p>Click the Salary Plan tab.</p> 
<p>The Salary Plan page displays.</p> 	
54.	<p>Click the Compensation tab.</p> 



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **Compensation** page displays.

55.	Click the Frequency Look up button In the Compensation Details section and select “M” (Monthly).
-----	--

56.	Click the Default Pay Components button.
-----	---

57.	Click the Rate Code Look up icon in the Pay Components section and select “NAANNL”.
-----	---

*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 NAANNL	0		USD	A	

Step	Action												
	<p>The Currency and Frequency fields default based on the Rate Code selected. Do not change.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0;"> <p>Pay Components ⓘ</p> <p>Amounts Controls Changes Conversion</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>*Rate Code</th> <th>Seq</th> <th>Comp Rate</th> <th>Currency</th> <th>Frequency</th> <th>Percent</th> </tr> </thead> <tbody> <tr> <td>1 NAANNL</td> <td style="text-align: center;">0</td> <td></td> <td style="border: 2px solid red;">USD</td> <td style="border: 2px solid red;">A</td> <td style="text-align: center;">+ -</td> </tr> </tbody> </table> <p style="text-align: center; margin-top: 5px;">Calculate Compensation</p> </div>	*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent	1 NAANNL	0		USD	A	+ -
*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent								
1 NAANNL	0		USD	A	+ -								
58.	<p>Click the Calculate Compensation button.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0; text-align: center;"> Calculate Compensation </div>												
59.	<p>Click the Benefits Program Participation link at the bottom of the page.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 5px 0; text-align: center;"> Job Data Employment Data Earnings Distribution Benefits Program Participation </div>												

The **Benefit Program Participation** page displays.

Benefit Program Participation

Jonathan Doe Employee Empl ID [redacted] Empl Record 0

Benefit Status ⓘ

Benefit Record Number 0 Go To Row

Effective Date 02/19/2026

Effective Sequence 0 Action Hire

HR Status Active Reason New Hire

Payroll Status Active Job Indicator Primary Job



*Benefits System Benefits Administration Current

Annual Benefits Base Rate USD Benefits Employee Status Active

[ACA Eligibility Details](#)

Benefits Administration Eligibility ⓘ

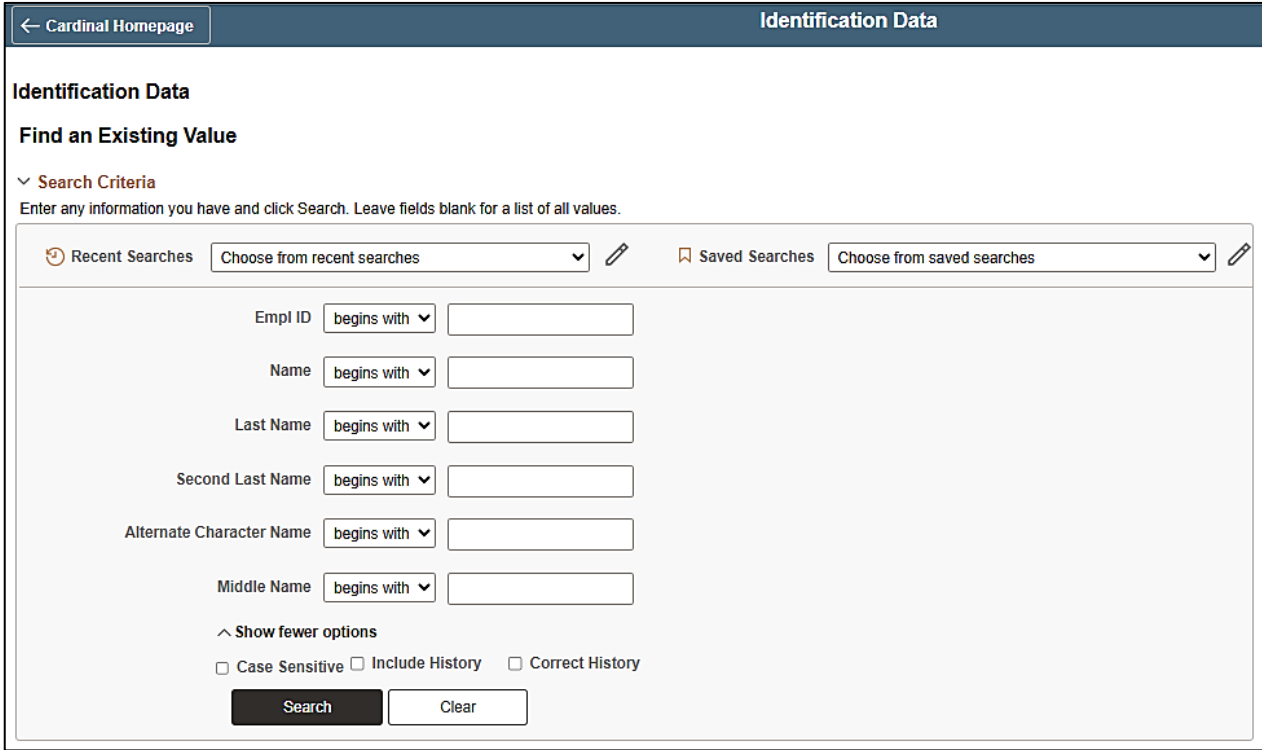


BAS Group ID <input type="text"/>	Elig Fld 1 <input type="text"/>	Elig Fld 2 <input type="text"/>	Elig Fld 3 <input type="text"/>
Elig Fld 4 <input type="text"/>	Elig Fld 5 <input type="text"/>	Elig Fld 6 <input type="text"/>	Elig Fld 7 <input type="text"/>
Elig Fld 8 <input type="text"/>	Elig Fld 9 <input type="text"/>		

Step	Action
60.	<p>Complete the Elig Fld 2, Elig Fld 3, Elig Fld 8, and Elig Fld 9 fields:</p> <ul style="list-style-type: none"> • Click the Elig Fld 2 Look up icon and select the applicable value • Click the Elig Fld 3 Look up icon and select “N” (No) • Click the Elig Fld 8 Look up icon and select “12-12” (12 months, 12 pays) • Click the Elig Fld 9 Look up icon and select the applicable benefits payment breakdown <div data-bbox="256 657 1425 890" style="border: 1px solid black; padding: 5px;"> <p>Benefits Administration Eligibility ⓘ</p> <p>BAS Group ID <input type="text"/></p> <p>Elig Fld 1 <input type="text"/></p> <p>Elig Fld 4 <input type="text"/></p> <p>Elig Fld 7 <input type="text"/></p> <p>Elig Fld 2 <input type="text"/></p> <p>Elig Fld 5 <input type="text"/></p> <p>Elig Fld 8 <input type="text"/></p> <p>Elig Fld 3 <input type="text"/></p> <p>Elig Fld 6 <input type="text"/></p> <p>Elig Fld 9 <input type="text"/></p> </div>
	<p>For further information on eligibility configuration valid values, see the Job Aid titled BN361 Overview of the Eligibility Configuration Fields. This Job Aid can be found on the Cardinal website in Job Aids under Training.</p>
61.	<p>Click the OK button.</p> <div data-bbox="256 1108 662 1205" style="border: 1px solid black; padding: 5px;"> <p>OK <input type="button" value="Cancel"/> <input type="button" value="Apply"/></p> </div>
	<p>If any of the following fields are blank, a warning message will display: Elig Fld 2, Elig Fld 3, Elig Fld 8, and Elig Fld 9. Once the record is saved, if anything is incorrect a help desk ticket must be entered to make the correction.</p>
<p>A Warning message displays in a pop-up window. A Compensation Rate of zero is correct because payroll is not managed in Cardinal.</p> <div data-bbox="464 1461 1172 1726" style="border: 1px solid gray; padding: 10px;"> <p>Warning -- Compensation Rate is zero. (1000,31)</p> <p>Either the action is Hire or the Compensation Rate has been changed to zero.</p> <p>If zero is correct, leave as is. Otherwise, enter a Compensation Rate.</p> <p style="text-align: center;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>	
62.	<p>Click the OK button.</p> <div data-bbox="256 1818 552 1902" style="border: 1px solid black; padding: 5px;"> <p>OK <input type="button" value="Cancel"/></p> </div>

Step	Action
	<p>The Organizational Relationships page redisplay.</p> <div style="border: 1px solid black; padding: 10px;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 10px;"> ← Organizational Relationships Modify a Person </div> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid black; margin-bottom: 10px;"> Biographical Details Contact Information Regional Organizational Relationships VA Person Info </div> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> Jonathan Doe Person ID </div> <div style="margin-bottom: 10px;"> <p>Choose Org Relationship to Add</p> <div style="border: 1px solid #ccc; padding: 10px; margin-bottom: 10px;"> <input checked="" type="checkbox"/> Employee <input type="checkbox"/> Contingent Worker <input type="checkbox"/> Person of Interest </div> <div style="display: flex; justify-content: space-between; margin-bottom: 5px;"> Empl Record 0 </div> <div style="display: flex; align-items: center; margin-bottom: 10px;"> Select Checklist Code <div style="border: 1px solid #ccc; padding: 2px 5px; margin-left: 5px;">Hire</div> » </div> <div style="background-color: #cccccc; padding: 5px; text-align: center; width: 100px; margin-left: auto;">Add Relationship</div> </div> <div style="display: flex; justify-content: space-between; margin-bottom: 10px;"> <div style="display: flex; gap: 5px;"> <div style="background-color: #000000; color: white; padding: 5px 10px;">Save</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">Notify</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">Refresh</div> </div> <div style="display: flex; gap: 5px;"> <div style="border: 1px solid #ccc; padding: 5px 10px;">Add</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">Update/Display</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">Include History</div> <div style="border: 1px solid #ccc; padding: 5px 10px;">Correct History</div> </div> </div> <div style="font-size: small; color: #000080;"> Biographical Details Contact Information Regional Organizational Relationships VA Person Info </div> </div>

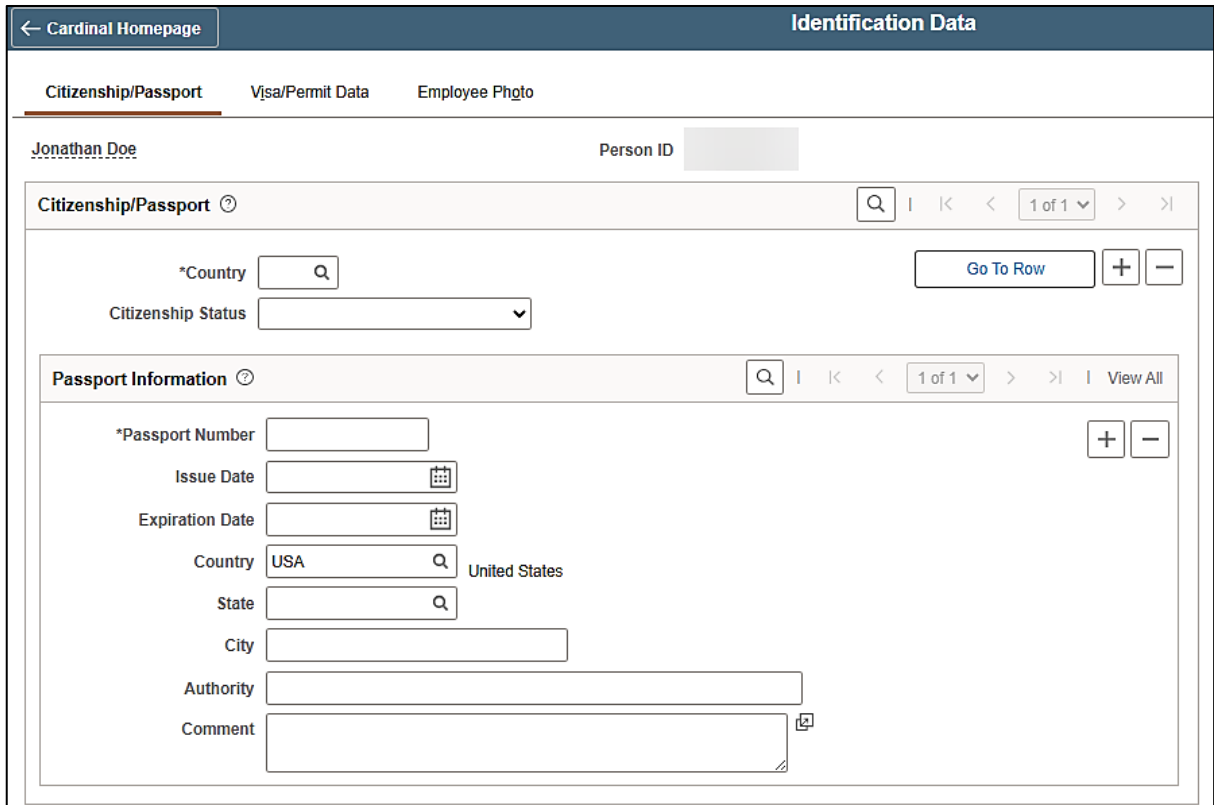
Adding Citizenship

To complete the hire process, a citizenship value must be added to the personal information for the employee.

Step	Action
1.	<p>Navigate to the Identification Data page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Citizenship > Identification Data</p>
<p>The Identification Data Find an Existing Value Search page displays.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;">  </div>	
2.	<p>Enter the applicable Employee ID in the Empl ID field.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>
3.	<p>Click the Search button.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;">  </div>


Step	Action
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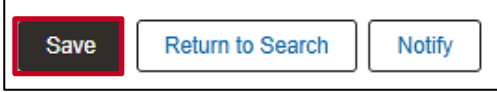
The **Identification Data** page displays with the **Citizenship/Passport** tab displayed by default.



4.	<p>Click the Country Look up icon and select “USA”.</p> <p>Note: This field must always be “USA” as this field references the country of employment.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>*Country USA <input type="text"/></p> </div>
----	---

5.	<p>Click the Citizenship Status dropdown button and select “Native”.</p> <p>Note: If citizenship status is unknown at the time of hire, select the option of “Not Indicated”.</p> <p>Do not leave this field blank.</p> <div style="border: 1px solid black; padding: 5px; width: fit-content;"> <p>*Country USA <input type="text"/> United States</p> <p>Citizenship Status Native <input type="text"/></p> </div>
----	---

	<p>For additional information on Citizenship Information, see the Updating Citizen Status section of the Job Aid titled HR351 Viewing and Modifying Personal Data. This Job Aid can be found on the Cardinal website in Job Aids under Learning.</p>
---	--

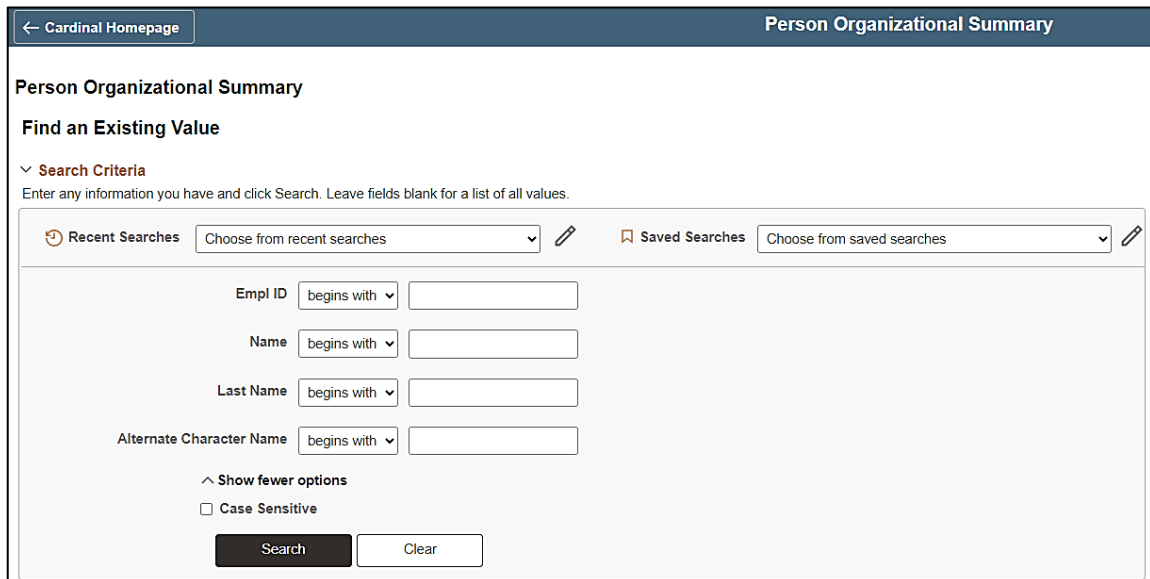
Step	Action
6.	Click the Save button. 

Hiring a Person When Personal Data Exists in Cardinal

There are times when only Personal Data exists in Cardinal for a person. In these cases, only the person's name and Employee ID will display on the **Person Organizational Summary** page. To complete the hire, the person must be hired by creating a new employment instance to create an employee record.

Step	Action
1.	Navigate to the Person Organizational Summary page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Person Organizational Summary

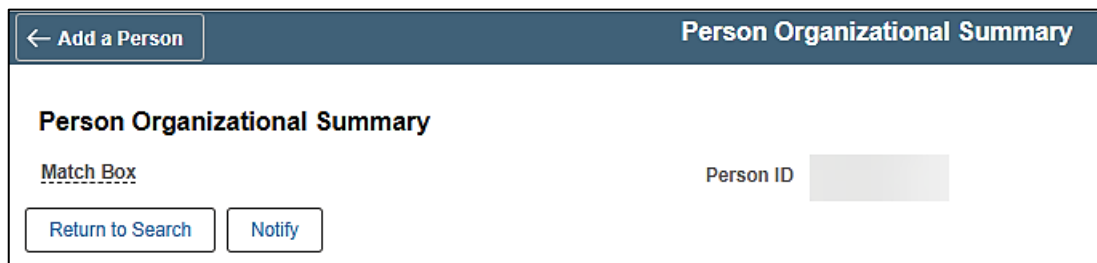
The **Person Organizational Summary Find an Existing Value** page displays.

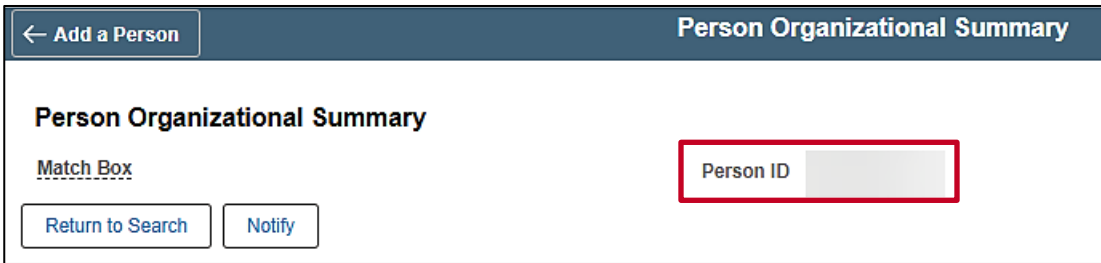
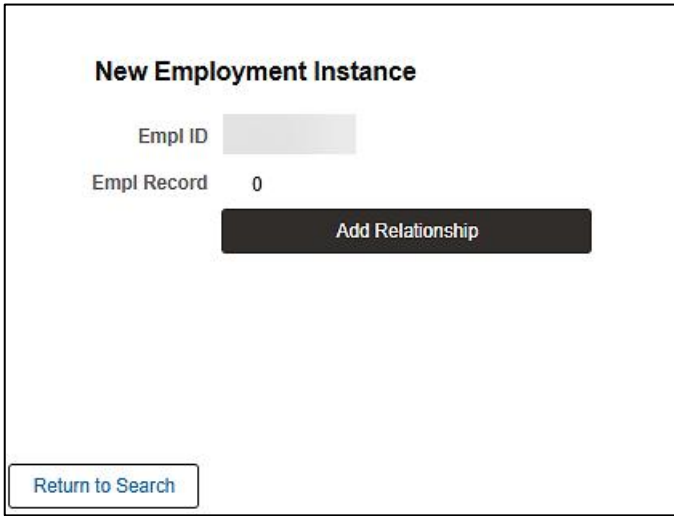
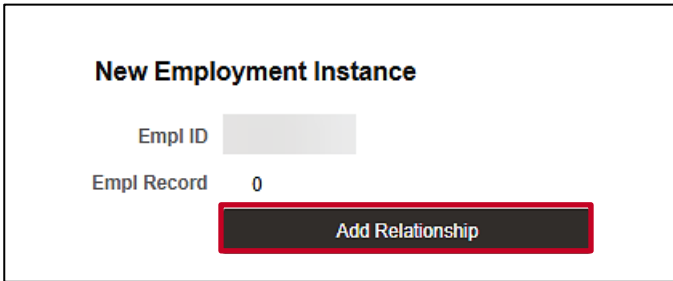


2. Enter any search criteria and click the **Search** button.



The **Person Organizational Summary** page displays.



Step	Action
3.	<p>Copy the Employee ID from the Person ID field.</p>  <p>The screenshot shows a dark blue header with a back arrow and 'Add a Person' button on the left, and 'Person Organizational Summary' on the right. Below the header, there's a 'Person Organizational Summary' section with a 'Match Box' label and a 'Person ID' input field highlighted with a red border. At the bottom, there are 'Return to Search' and 'Notify' buttons.</p>
4.	<p>Navigate to the Add Employment Instance page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance</p> <p>The New Employment Instance page displays.</p>  <p>The screenshot shows a form titled 'New Employment Instance' with two input fields: 'Empl ID' and 'Empl Record' (containing the value '0'). Below these fields is a dark grey 'Add Relationship' button highlighted with a red border. A 'Return to Search' button is located at the bottom left of the form area.</p>
5.	<p>Click the Add Relationship button.</p>  <p>This is a close-up of the 'Add Relationship' button from the previous screenshot, which is highlighted with a red border.</p>



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **Job Data** page displays with the **Work Location** tab displayed by default.

The screenshot shows the 'Work Location' tab selected in a system interface. The page title is 'Match Box Employee' and it displays 'Empl ID' and 'Empl Record 0'. The 'Work Location Details' section includes the following fields and controls:

- *Effective Date: 03/30/2026 (with a calendar icon)
- Effective Sequence: 0
- HR Status: Active
- Payroll Status: Active
- *Action: Hire (dropdown menu)
- Reason: (dropdown menu)
- *Job Indicator: Primary Job (dropdown menu)
- Buttons: 'Calculate Status and Dates', 'Go To Row', '+', '-'
- Position Number: (input field with search icon)
- Position Entry Date: (input field with calendar icon)
- *Regulatory Region: USA (dropdown menu) with 'United States' displayed below.
- *Company: (input field with search icon)
- *Business Unit: 15100 (dropdown menu) with 'Department of Accounts' displayed below.
- *Department: (input field with search icon)
- Department Entry Date: 03/30/2026 (with a calendar icon)
- *Location: (input field with search icon)
- Establishment ID: (input field with search icon)
- Date Created: 03/30/2026

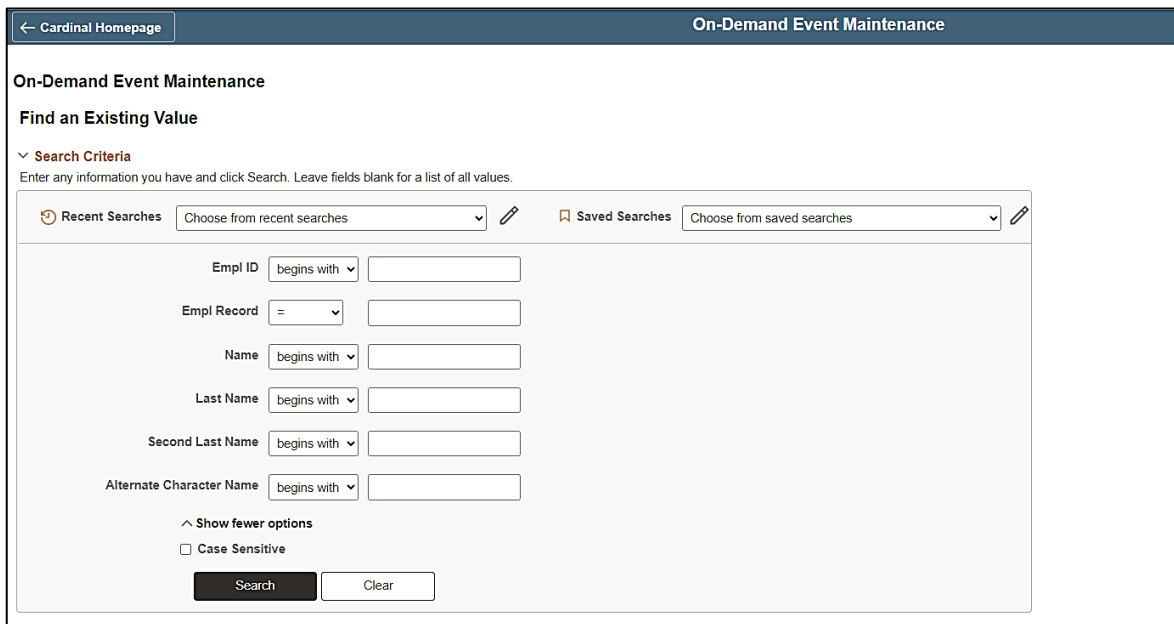
6.	Complete the hire as detailed in the Completing a New Hire section of this Job Aid beginning with Step 44 .
----	--

New Hire Benefit Enrollment

Now that New Hire processing is complete, the Benefits Administrator will be able to complete the benefit enrollment elections for the new hire employee. This process is performed on the **On-Demand Event Maintenance** page after the employee submits their Benefits Enrollment form to the BA with all the information necessary to complete the process.

Step	Action
1.	Navigate to the On-Demand Event Maintenance page using the following path: NavBar > Menu > Benefits > Manage Automated Enrollment > Events > On-Demand Event Maintenance

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



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. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.
----	--



3.	Click the Search button.
----	---------------------------------



Step	Action
------	--------

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

On-Demand Event Maintenance

Jonathan Doe Person ID Ben Record 0

Activity Date Empl Record 0

Schedule/Prepare Activity Pending Activities 2 Show Activities Action

Event ID 0 Event Date Status Class Event Status Update

Prepare Options Event Status

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 Normal Processing

Save Return to Search Notify

4. Review the **Pending Activities** field and proceed based on the following:

- If the **Pending Activities** field displays a “2”, the Benefits Administration process has not run and the HR2 Benefit Event has not been automatically processed and closed. Proceed with **Step 5**.
- If the **Pending Activities** field displays a “1”, the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed but the “HIR” Benefit Event has not been prepared. Skip to **Step 9**.
- If the **Pending Activities** field displays a “0”, the Benefits Administration process has run and the HR2 Benefit Event has been automatically processed and closed. Additionally, the “HIR” Benefit Event has been prepared. Skip to **Step 12**.

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 2 Show Activities Action

5. Click the **Show Activities** button.

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 2 Show Activities Action

Step	Action
------	--------

The **BAS Activity** page displays in a pop-up window.

Jonathan Doe
Person ID
Ben Record 0
Help

BAS Activity

1-2 of 2

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
<input type="checkbox"/>	0	Manual Event	02/19/2026	0	HR2		+	-
<input type="checkbox"/>	0	Job Data Change	02/19/2026	0	HIR		+	-

OK
Cancel

6. Click the **Select** checkbox option for the HR2 Benefit Event.

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
<input checked="" type="checkbox"/>	0	Manual Event	02/19/2026	0	HR2		+	-

7. Click the **OK** button.

OK

Cancel



Step	Action
------	--------

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

On-Demand Event Maintenance

Jonathan Doe Person ID Ben Record 0

Activity Date 02/19/2026 Source Manual Event Empl Record 0

Pending Activities 2 Action HR2

Event ID 0 Event Date Status Class

Event Status

Run Date **Frequency**

Entered 0 of 0

Errors 0 Finalize/Apply Defaults

Run Date

Process Indicator Normal Processing

8. Review the **Activity Date** field. The Activity Date is the effective date of the Event that matches the Effective Date on the Job Record from the New Hire transaction completed by the HR Administrator.

Note: For HR2 Benefit Events, the **Source** field will be "Manual Event", and the **Action** field will be "HR2".

Activity Date 02/19/2026 **Source Manual Event** Empl Record 0

Pending Activities 2 **Action HR2**

9. Click the **Schedule/Prepare Activity** button to manually run the Benefits Administration process for this Benefit Event.

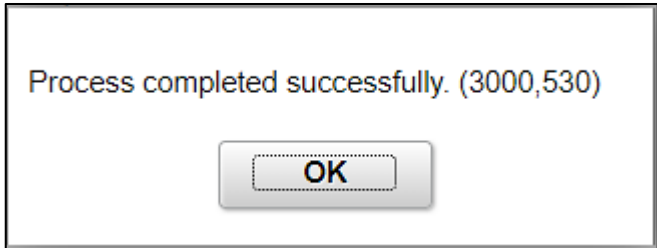
Note: This will process and close the HR2 Benefit Event.

Activity Date 02/19/2026 Source Manual Event Empl Record 0

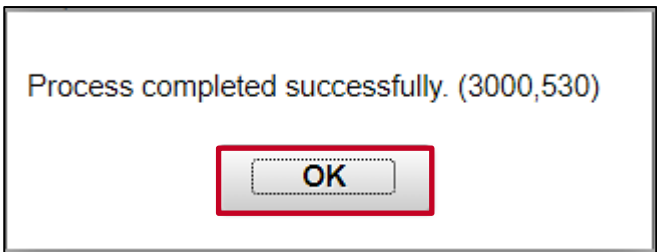
Pending Activities 2 Action HR2

Step	Action
------	--------

A **Confirmation** message displays in a pop-up window once the automated program completes.



10. Click the **OK** button to close the message.



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

On-Demand Event Maintenance

Jonathan Doe Person ID Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 02/19/2026 Status Prepared Class HIR Event Status Update

Prepare Options Event Status Open for Processing

Enrollment Statement Run Date **Frequency**

Deduction Frequency Annual Frequency

Election Entry Entered 0 of 1 Show Plans

Validate/Finalize Errors 0 Show Errors Finalize/Apply Defaults

Confirmation Statement Run Date

Reprocess Process Indicator N Q Normal Processing

Save Return to Search Notify



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
11.	<p>Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”.</p> <div data-bbox="256 453 1455 762"><p>Activity Date Source Empl Record 0</p><p>Schedule/Prepare Activity Pending Activities 0 Show Activities Action</p><hr/><p>Event ID 2 Event Date 02/19/2026 Status Prepared Class HIR Event Status Update</p><p>Prepare Options Event Status Open for Processing</p><p>Enrollment Statement Run Date Frequency</p><p><input checked="" type="radio"/> Deduction Frequency <input type="radio"/> Annual Frequency</p></div>
12.	<p>Click the Election Entry button.</p> <div data-bbox="256 848 1455 1136"><p>Enrollment Statement Run Date Frequency</p><p><input checked="" type="radio"/> Deduction Frequency <input type="radio"/> Annual Frequency</p><p>Election Entry Entered 0 of 1 Show Plans</p><p>Validate/Finalize Errors 0 Show Errors <input type="checkbox"/> Finalize/Apply Defaults</p><p>Confirmation Statement Run Date</p></div>



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

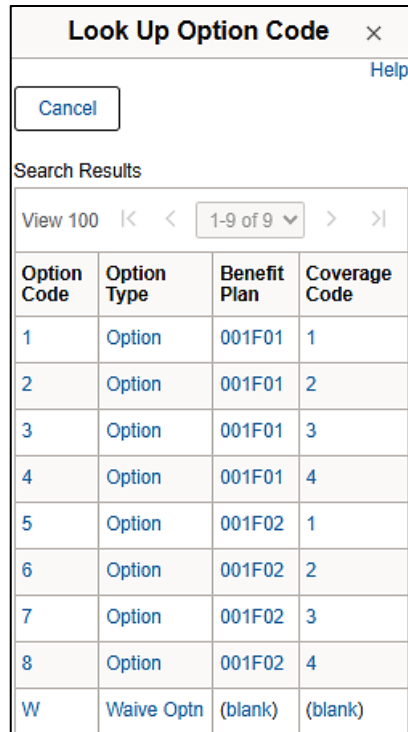
Step	Action
------	--------

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

13. 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.



Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	001F01	1
2	Option	001F01	2
3	Option	001F01	3
4	Option	001F01	4
5	Option	001F02	1
6	Option	001F02	2
7	Option	001F02	3
8	Option	001F02	4
W	Waive Optn	(blank)	(blank)

- Select the applicable Medical Plan based on the employee’s Benefits Enrollment form by clicking the corresponding link in the corresponding **Option Code** column (In this example, Option Code “4”, Benefit Plan “001F01” with Coverage Code “4”, will be selected).

Note: The Coverage Codes are as follows: 1 – Single, 2 – Employee + Spouse, 3 – Employee + Child, and 4 – Employee + 2 or More Dependents (Family).

Option Code	Option Type	Benefit Plan	Coverage Code
1	Option	001F01	1
2	Option	001F01	2
3	Option	001F01	3
4	Option	001F01	4
5	Option	001F02	1
6	Option	001F02	2

Step	Action
------	--------

The **BenAdmin Data Entry** page redisplay with the **Option Election** tab refreshed.

BenAdmin Data Entry
×

[Help](#)

Event / Participant Selection
Option Election
Dependents / Beneficiaries

Sched ID EM00 Empl ID [redacted] Jonathan Doe

Ben Record 0 Event ID 2

Event Data 02/19/2026 Initial Enrollment

Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options
🔍 | 1 of 1

Plan Type 10 : Medical

Option Code

🔄

Key Adv Exp Comprehensive Dent (001F01) (Family)

Health Provider ID

Previously Seen

Special Requirements

Dependents/Beneficiaries

[Enroll All](#)

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	-
<input type="button" value="+"/>							

[Event / Participant Selection](#) | [Option Election](#) | [Dependents / Beneficiaries](#)



If the employee is single and elected a Benefit Plan with a Coverage Code of "1", skip to **Step 35**. If the employee selected a Benefit Plan with any other Coverage Code, the employee's dependent(s) must be added. Proceed to the next step.

15. Click the **Dependents / Beneficiaries** tab.

Event / Participant Selection
Option Election
Dependents / Beneficiaries

Step	Action
------	--------

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

×
Help

Name Address Personal Profile

Jonathan Doe
Person ID

Dependent/Beneficiaries
🔍 | < | << | 1 of 1 | >> | > | View All

*Dependent/Beneficiary ID

+ -

Name History
🔍 | < | << | 1 of 1 | >> | > | View All

*Effective Date

📅
+ -

*Format Type

English ▼

Display Name
Edit Name

OK
Cancel
Apply

Name | [Address](#) | [Personal Profile](#)



The **Dependent/Beneficiary ID** field will default to “01” for the first dependent and increment by 1 for each additional dependent subsequently added.

The **Effective Date** field defaults to the Event Date (employee’s hire date for new hire enrollments). This date must be on or before the new hire Event Date and should not be updated.

Dependent/Beneficiaries
🔍 | < | << | 1 of 1 | >> | > | View All

*Dependent/Beneficiary ID

+ -

Name History
🔍 | < | << | 1 of 1 | >> | > | View All

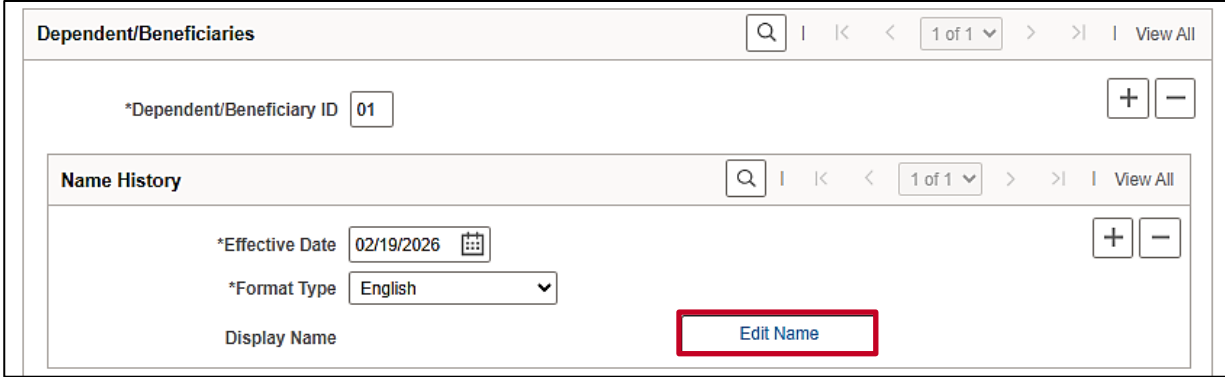
*Effective Date

📅
+ -

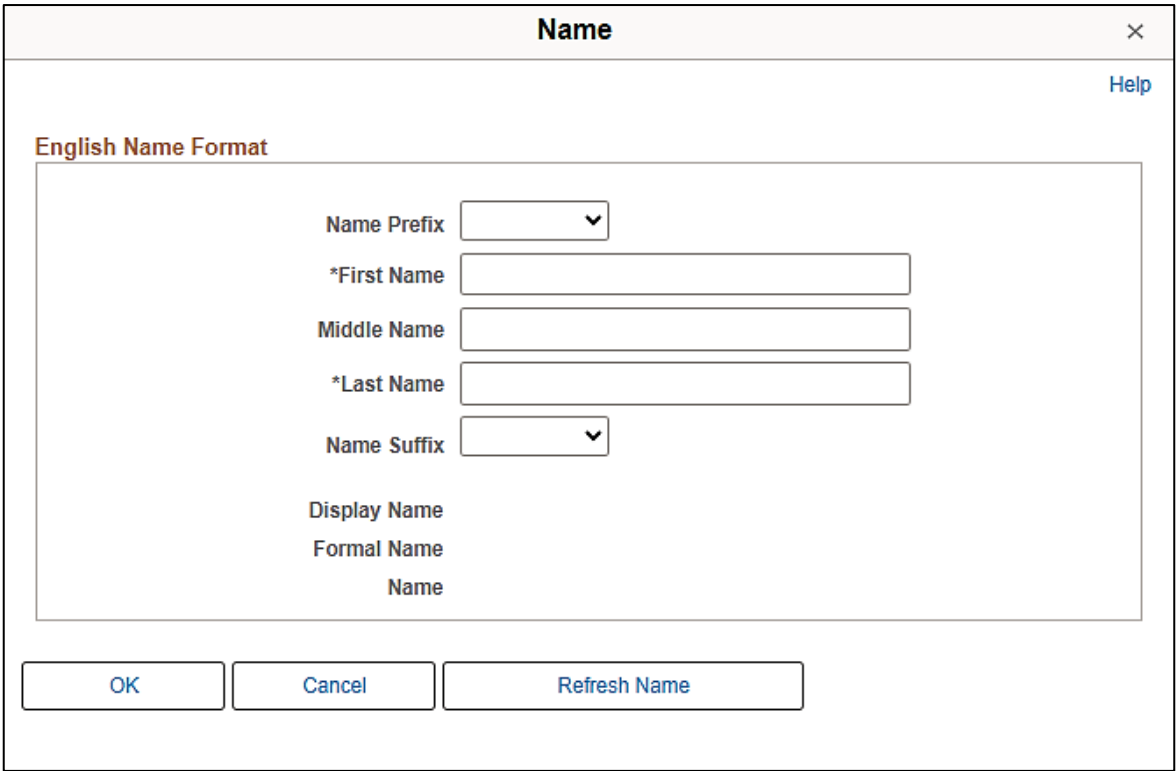
*Format Type

English ▼

Display Name
Edit Name

Step	Action
17.	<p>Click the Edit Name button.</p>  <p>The screenshot shows two sections: 'Dependent/Beneficiaries' and 'Name History'. In the 'Name History' section, there are fields for '*Effective Date' (02/19/2026), '*Format Type' (English), and 'Display Name'. A blue button labeled 'Edit Name' is highlighted with a red rectangular box.</p>

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

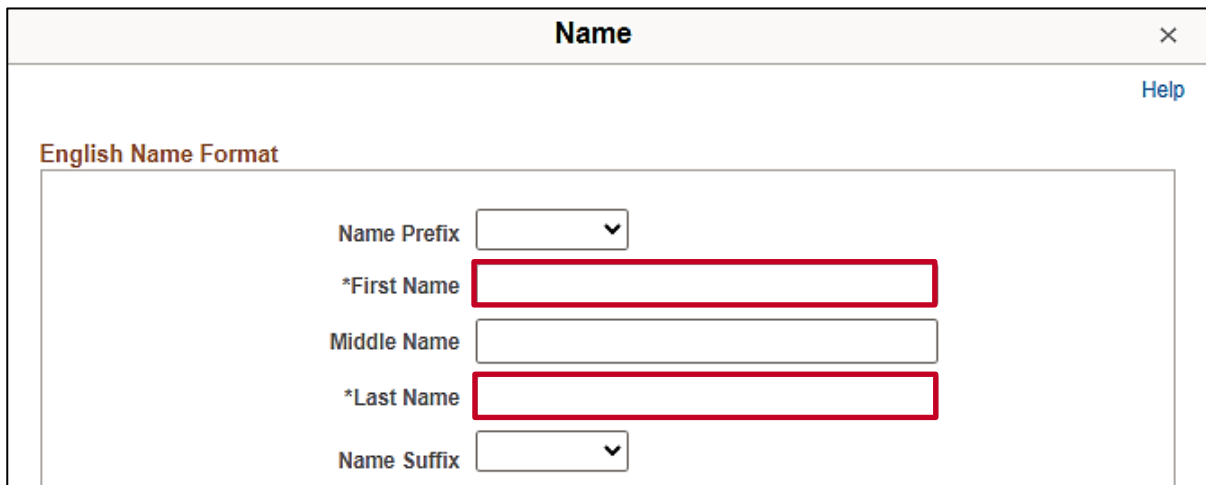


The 'Name' pop-up window contains the following elements:

- Title:** Name
- Buttons:** Close (X), Help
- Section:** English Name Format
- Fields:**
 - Name Prefix (dropdown)
 - *First Name (text input)
 - Middle Name (text input)
 - *Last Name (text input)
 - Name Suffix (dropdown)
 - Display Name (text input)
 - Formal Name (text input)
 - Name (text input)
- Bottom Buttons:** OK, Cancel, Refresh Name

Step	Action
------	--------

18. 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.



Name [Close]

[Help](#)

English Name Format

Name Prefix [Dropdown]


*First Name [Red Box]

Middle Name [Text Field]

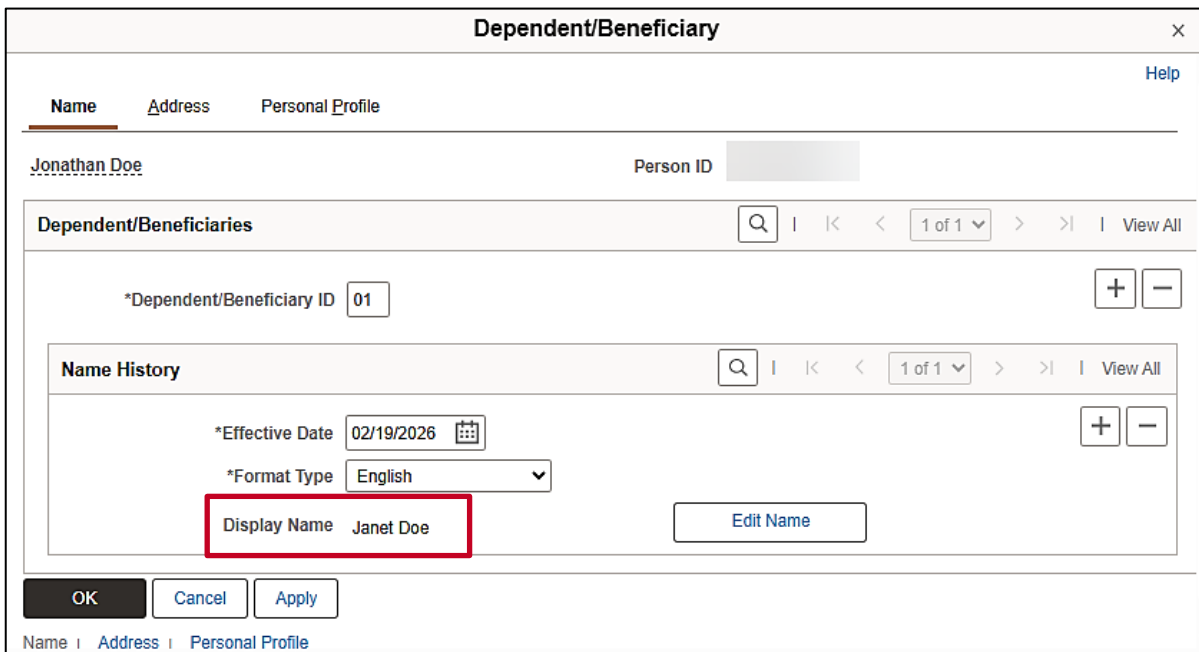
*Last Name [Red Box]

Name Suffix [Dropdown]

19. Click the **OK** button.



The **Name** page refreshes with the dependent's name displayed in the **Display Name** field.



Dependent/Beneficiary [Close]

[Name](#) | [Address](#) | [Personal Profile](#) | [Help](#)

Jonathan Doe Person ID [Redacted]

Dependent/Beneficiaries [Search] | [Page 1 of 1] | View All

*Dependent/Beneficiary ID [01] [+ -]

Name History [Search] | [Page 1 of 1] | View All

*Effective Date [02/19/2026] [+ -]

*Format Type [English] [Dropdown]

Display Name Janet Doe [Red Box] [Edit Name]

[OK] [Cancel] [Apply]

[Name](#) | [Address](#) | [Personal Profile](#)

Step	Action
20.	Click the Address tab. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Name <div style="border: 2px solid red; padding: 2px; display: inline-block;">Address</div> Personal Profile </div>

The **Address** page displays.

x
Help

Name
Address
Personal Profile

Dependent/Beneficiaries
Q
|
<
>
1 of 1
>
>|
|
View All

Jonathan Doe
Person ID
+ -

Dependent/Beneficiary ID 01
Name Janet Doe

Address History
Q
|
<
>
1 of 1
>
>|
|
View All

*Effective Date
02/19/2026 📅
+ -

Same Address as Employee
Address Type

Country
USA Q
United States

Address
Edit Address

Phone Information
Q
|
<
>
1-1 of 1
>
>|

Same As Employee	Phone Type	Telephone	Extension	Preferred		
<input type="checkbox"/>	 	 	 	<input type="checkbox"/>	+	-



Step	Action
21.	<p>Complete the address information as applicable for the dependent by either: Clicking the Same Address as Employee checkbox option (applicable for this example)</p> <div data-bbox="256 470 1393 653"><p>Address History Q < > 1 of 1 View All</p><p>*Effective Date 02/19/2026 + -</p><p><input checked="" type="checkbox"/> Same Address as Employee Address Type ▼</p></div> <p>or:</p> <p>Clicking the Address Type dropdown button provided, selecting the applicable Address Type, and then clicking the Edit Address button. The Edit Address page will display in a pop-up window, and the applicable address information can be entered.</p> <div data-bbox="256 837 1393 1291"><p>Address History Q < > 1 of 1 View All</p><p>*Effective Date 02/19/2026 + -</p><p><input type="checkbox"/> Same Address as Employee Address Type ▼</p><p>Address</p><p>Country USA Q United States</p><p>Address Edit Address</p></div>

Step	Action
------	--------

The **Address** page refreshes with Address History section with the dependent's address information displayed in the **Address History** section.

X
Help

Name
Address
Personal Profile

Dependent/Beneficiaries
Q | | < 1 of 1 > | View All

Jonathan Doe
Person ID
+
-

Dependent/Beneficiary ID 01
Name Janet Doe

Address History
Q | | < 1 of 1 > | View All

*Effective Date 📅
+
-

Same Address as Employee
Address Type Home ▾

Employee's Current Address

Country USA United States

Address 123 Main St
Richmond, VA 12345

Phone Information

22.	Click the Personal Profile tab. <div style="border: 1px solid black; padding: 5px; margin-top: 10px; display: flex; justify-content: space-between; align-items: center;"> Name Address Personal Profile </div>
-----	--

Step	Action
------	--------

The **Personal Profile** page displays.

X
Help

Name
Address
Personal Profile

Jonathan Doe
Person ID

Personal Profile
Q | < > 1 of 1 > | View All

Dependent/Beneficiary ID 01 Janet Doe
+
-

*Date of Birth

Birth Country

Date of Death

Medicare Entitled Date

Birth Location

Birth State

Riders/Orders exist

Personal History
Q | < > 1 of 1 > | View All

*Effective Date 02/19/2026
+
-

*Relationship to Employee

*Dependent Beneficiary Type

*Gender Unknown

*Marital Status Single

Student

Disabled

Smoker

As of






As of

As of

As of

Occupation

	The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, 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).
23.	<p>Click the Date of Birth Calendar icon and select the dependent's date of birth.</p> <div style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; border-bottom: 1px solid #ccc; margin-bottom: 5px;"> Dependent/Beneficiary ID 01 Janet Doe </div> <div style="display: flex; justify-content: space-between; align-items: center;"> *Date of Birth <div style="border: 2px solid red; padding: 2px; display: flex; align-items: center;"> <input style="width: 80px; height: 20px; border: none;" type="text"/> </div> </div> </div>
	The Effective Date in the Personal History section defaults to the date of hire. Do not change.

Step	Action
24.	Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee. 
25.	Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent". 
26.	Click the Gender dropdown button and select the dependent's gender ("Male" or "Female"). 
27.	The Marital Status field defaults to "Single". Updated as needed for the dependent. 
28.	If any status other than "Single" is selected, the Marital Status As of field will default to the date of hire and must be updated as applicable using the Marital Status As of Calendar icon. 



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
------	--------

The updated **Dependent/Beneficiary** page displays.

×
Help

Name
Address
Personal Profile

Jonathan Doe
Person ID

Personal Profile

 | < > | 1 of 1 | View All

Dependent/Beneficiary ID 01 Janet Doe
+ -

*Date of Birth

Birth Country

Date of Death

Medicare Entitled Date

Birth Location

Birth State

Riders/Orders exist

Riders/Orders

Personal History

 | < > | 1 of 1 | View All

*Effective Date + -

*Relationship to Employee

*Dependent Beneficiary Type

*Gender

*Marital Status

Student As of

Disabled As of

Smoker As of

29. Scroll down to the **National ID** section.

National ID

 | < > | 1-1 of 1 | View All

*Country	*National ID Type	Description	National ID	Primary ID
<input type="text" value="USA"/> <input type="text" value=""/>	<input type="text" value="PR"/> <input type="text" value=""/>	Social Security Number	<input type="text" value=""/>	<input checked="" type="checkbox"/> + -



Step	Action											
30	<p>Enter the dependent's Social Security Number (SSN) in the National ID field.</p> <p>If the employee did not provide the dependent's SSN, this field can be left blank for now. However, the SSN should be obtained and entered as soon as possible. Dependent SSNs are necessary for accurate ACA reporting. Benefits Administrators can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.</p> <div data-bbox="256 569 1442 762" style="border: 1px solid black; padding: 5px;"> <p>▼ National ID</p> <table border="1"> <thead> <tr> <th>*Country</th> <th>*National ID Type</th> <th>Description</th> <th>National ID</th> <th>Primary ID</th> </tr> </thead> <tbody> <tr> <td>USA</td> <td>PR</td> <td>Social Security Number</td> <td style="border: 2px solid red;"></td> <td><input checked="" type="checkbox"/></td> </tr> </tbody> </table> </div>	*Country	*National ID Type	Description	National ID	Primary ID	USA	PR	Social Security Number		<input checked="" type="checkbox"/>	
*Country	*National ID Type	Description	National ID	Primary ID								
USA	PR	Social Security Number		<input checked="" type="checkbox"/>								
31.	<p>Click the OK button.</p> <div data-bbox="256 850 768 934" style="border: 1px solid black; padding: 5px;"> <div style="display: flex; gap: 10px;"> <div style="border: 2px solid red; padding: 5px 15px; background-color: #333; color: white; font-weight: bold;">OK</div> <div style="border: 1px solid #ccc; padding: 5px 15px; color: #0070c0;">Cancel</div> <div style="border: 1px solid #ccc; padding: 5px 15px; color: #0070c0;">Apply</div> </div> </div>											
<p>The Dependents / Beneficiaries page redisplay.</p> <div data-bbox="186 1024 1453 1612" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center; font-weight: bold;">BenAdmin Data Entry</p> <p style="text-align: right;">Help</p> <p>Event / Participant Selection Option Election <u>Dependents / Beneficiaries</u></p> <hr/> <p>Schedule ID EM00 Employee ID [redacted] Jonathan Doe Event ID 2 Event Data 02/19/2026 Initial Enrollment Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits</p> <p>Dependent/Beneficiaries Currently on Record</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Relationship to Employee</th> <th>Dependent Beneficiary Type</th> <th>Date of Birth</th> </tr> </thead> <tbody> <tr> <td>Doe,Janet</td> <td>Spouse</td> <td>Approved Dependent</td> <td>03/01/2003</td> </tr> </tbody> </table> <p>Change/Add Dependent Data</p> <p>Elections Requiring Supplemental Information</p> <table border="1"> <tbody> <tr> <td>10</td> <td>Medical</td> <td style="text-align: right;">Enroll Dependents</td> </tr> </tbody> </table> <p style="display: flex; justify-content: space-between; margin-top: 10px;"> OK Cancel Apply Refresh </p> <p style="font-size: small; margin-top: 5px;">Event / Participant Selection Option Election Dependents / Beneficiaries</p> </div>		Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Doe,Janet	Spouse	Approved Dependent	03/01/2003	10	Medical	Enroll Dependents
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth									
Doe,Janet	Spouse	Approved Dependent	03/01/2003									
10	Medical	Enroll Dependents										
32.	<p>If additional dependents need to be added, proceed to the next step. If no additional dependents need to be added, skip to Step 35.</p>											

Step	Action
------	--------

33. Click the **Change/Add Dependent Data** link in the **Dependent/Beneficiaries Currently on Record** section.

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe,Janet	Spouse	Approved Dependent	03/01/2003

[Change/Add Dependent Data](#)

The **Dependent/Beneficiary** page displays with the **Name** tab displayed by default.

X
Help

Name
Address
Personal Profile

Jonathan Doe
Person ID

Dependent/Beneficiaries
Q | < > | 1 of 1 | View All

*Dependent/Beneficiary ID
+ -

Name History
Q | < > | 1 of 1 | View All

*Effective Date
+ -

*Format Type

Display Name Janet Doe
Edit Name

OK
Cancel
Apply

Name | Address | Personal Profile

34. Click the **Add a New Row** icon (+) within the **Dependent/Beneficiaries** section.

Dependent/Beneficiaries
Q | < > | 1 of 1 | View All

*Dependent/Beneficiary ID
+ -

Step	Action
------	--------

The **Name** page refreshes with a new row in the **Dependent/Beneficiaries** section (“2 of 2” in this example).

The **Dependent/Beneficiary ID** field increments by one (“02” in this example as this is the second dependent being added). Repeat **Steps 17 – 31** to complete the data entry for the next dependent and then repeat as needed until all dependents have been added.

Dependent/Beneficiary x

[Help](#)

Name
Address
Personal Profile

Jonathan Doe
Person ID

Dependent/Beneficiaries
Q | <K> < 2 of 2 > >I | [View All](#)

*Dependent/Beneficiary ID 02
+ -

Name History
Q | <K> < 1 of 1 > >I | [View All](#)

*Effective Date
+ -

*Format Type English

Display Name
[Edit Name](#)

Name
[Address](#)
[Personal Profile](#)



All dependents that have been added display in the **Dependent/Beneficiaries Currently on Record** section.

Dependent/Beneficiaries Currently on Record			
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth
Doe,Janet	Spouse	Approved Dependent	03/01/2003
Doe,Jeremiah	Child	Approved Dependent	02/01/2025

[Change/Add Dependent Data](#)

35.	Click the Option Election tab. <div style="border: 1px solid #ccc; padding: 5px; margin-top: 5px; display: flex; justify-content: space-around; align-items: center;"> Event / Participant Selection Option Election Dependents / Beneficiaries </div>
-----	--



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
------	--------

The **Option Election** page displays.

BenAdmin Data Entry [Close]

Help

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

Sched ID EM00 Empl ID [Redacted] Jonathan Doe Ben Record 0 Event ID 2
Event Data 02/19/2026 Initial Enrollment Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options [Search] | 1 of 1 [Dropdown]

Plan Type 10 : Medical

Option Code [Search] Key Adv Exp Comprehensive Dent (001F01) (Family) [Refresh]

Health Provider ID Previously Seen [Special Requirements](#)

Dependents/Beneficiaries

ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text"/>			<input type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

Event / Participant Selection | Option Election | Dependents / Beneficiaries

Step	Action																								
36.	<p>Enroll the dependents in the previously selected Medical Plan by either: Clicking the Enroll All button if all dependents will be enrolled (applicable for this example)</p> <div data-bbox="256 470 638 596" style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p style="text-align: center; margin: 0;">Dependents/Beneficiaries</p> <div style="border: 2px solid red; padding: 5px; text-align: center; margin: 5px auto; width: 80%;">Enroll All</div> </div> <p>OR</p> <p>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 (+...)</p> <div data-bbox="256 783 1471 999" style="border: 1px solid black; padding: 5px;"> <p style="text-align: center; margin: 0;">Dependents/Beneficiaries</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 15%;">*ID</th> <th style="width: 20%;">Name</th> <th style="width: 15%;">Relationship to Employee</th> <th style="width: 15%;">Health Provider ID</th> <th style="width: 10%;">Previously Seen</th> <th style="width: 10%;">Covered Person Type</th> <th style="width: 15%;">Age Limit Flag</th> <th style="width: 5%;"></th> </tr> </thead> <tbody> <tr> <td style="border: 2px solid red; text-align: center;">🔍</td> <td></td> <td></td> <td style="border: 1px solid black;"></td> <td style="text-align: center;"><input type="checkbox"/></td> <td></td> <td style="text-align: center;"><input type="checkbox"/></td> <td style="text-align: center;">-</td> </tr> <tr> <td colspan="8" style="border: 2px solid red; text-align: center;">+...</td> </tr> </tbody> </table> </div>	*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		🔍				<input type="checkbox"/>		<input type="checkbox"/>	-	+...							
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag																			
🔍				<input type="checkbox"/>		<input type="checkbox"/>	-																		
+...																									



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **Option Election** page redisplay.

BenAdmin Data Entry x

Help

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

Sched ID	EM00	Empl ID	Jonathan Doe	Ben Record	0	Event ID	2
Event Data	02/19/2026	Initial Enrollment		Excess Credit Rollover To		Forfeit Excess Credits	

Available Plans and Options
1 of 1

Plan Type 10 : Medical

Option Code ↻

Key Adv Exp Comprehensive Dent (001F01) (Family)

Health Provider ID Previously Seen

[Special Requirements](#)

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text" value="01"/>	Janet Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="02"/>	Jeremiah Doe	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

Event / Participant Selection | Option Election | Dependents / Beneficiaries

37. The enrolled dependents display in the **Dependents/Beneficiaries** section. Validate for accuracy and ensure that all applicable dependents are listed.

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
<input type="text" value="01"/>	Janet Doe	Spouse	<input type="text"/>	<input type="checkbox"/>	Spouse	<input type="checkbox"/>	<input type="button" value="-"/>
<input type="text" value="02"/>	Jeremiah Doe	Child	<input type="text"/>	<input type="checkbox"/>	Child	<input checked="" type="checkbox"/>	<input type="button" value="-"/>
<input type="button" value="+"/>							

38. Click the **OK** button.

OK

Cancel

Apply



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **On-Demand Event Maintenance** page redisplay.

On-Demand Event Maintenance

Jonathan Doe Person ID [redacted] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 02/19/2026 Status Entered Class HIR [Event Status Update](#)

Prepare Options Event Status Open for Processing

[Enrollment Statement](#) Run Date

Frequency Deduction Frequency Annual Frequency

[Election Entry](#) Entered 1 of 1 [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](#)

39. Confirm the **Status** is “Entered”, and the **Event Status** is “Open for Processing”.

On-Demand Event Maintenance

Jonathan Doe Person ID [redacted] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 02/19/2026 **Status Entered** Class HIR [Event Status Update](#)

Prepare Options **Event Status Open for Processing**

Step	Action
40.	<p>Click the Validate/Finalize button to manually run the Benefits Administration process for this Benefit Event.</p> <p>Note: This process will validate elections, close the event, and send the elections to the benefits vendors.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="border: 1px solid #ccc; padding: 2px;">Election Entry</div> <div style="text-align: center;">Entered 1 of 1</div> <div style="border: 1px solid #ccc; padding: 2px;">Show Plans</div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start; margin-top: 5px;"> <div style="border: 2px solid red; padding: 2px;">Validate/Finalize</div> <div style="text-align: center;">Errors 0</div> <div style="border: 1px solid #ccc; padding: 2px; background-color: #eee;">Show Errors</div> <div style="text-align: right;"><input type="checkbox"/> Finalize/Apply Defaults</div> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start; margin-top: 5px;"> <div style="border: 1px solid #ccc; padding: 2px; background-color: #eee;">Confirmation Statement</div> <div style="text-align: center;">Run Date</div> </div> </div>
	<p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <div style="border: 1px solid #ccc; padding: 20px; text-align: center; margin: 10px 0;"> <p>Process completed successfully. (3000,530)</p> <div style="border: 1px solid #ccc; padding: 5px; display: inline-block; margin: 10px 0;">OK</div> </div>
41.	<p>Click the OK button to close the message.</p> <div style="border: 1px solid #ccc; padding: 20px; text-align: center; margin: 10px 0;"> <p>Process completed successfully. (3000,530)</p> <div style="border: 2px solid red; padding: 5px; display: inline-block; margin: 10px 0;">OK</div> </div>



HR and Benefits Job Aid

TLC and HBO Completing a New Hire and Benefit Enrollment

Step	Action
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The **On-Demand Event Maintenance** page refreshes.

On-Demand Event Maintenance

Jonathan Doe Person ID [redacted] Ben Record 0

Activity Date Source Empl Record 0

Schedule/Prepare Activity Pending Activities 0 Show Activities Action

Event ID 2 Event Date 02/19/2026 Status Finalized - Enrolled Class HIR 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

42.	<p>Confirm that the Status is "Finalized - Enrolled" and the Event Status is "Closed to Processing".</p> <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <h3>On-Demand Event Maintenance</h3> <p><u>Jonathan Doe</u> Person ID [redacted] Ben Record 0</p> <hr/> <p>Activity Date Source Empl Record 0</p> <p>Schedule/Prepare Activity Pending Activities 0 Show Activities Action</p> <hr/> <p>Event ID 2 Event Date 02/19/2026 Status Finalized - Enrolled Class HIR Event Status Update</p> <p>Prepare Options Event Status Closed to Processing</p> </div>
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