

TLC and HBO Completing a Rehire 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.

Employee Records are used to manage the history of the different jobs an employee may have. An employee's initial hire is assigned to employee record 0. All new employee records are incremented by 1. When adding a new employment instance, Cardinal asks if the new employment instance should be associated to the current employee record. For guidance on when to answer "Yes" or "No" to this question, see the below guidance:

- Answer "Yes" if the employee is being rehired into the same HBO Agency or Locality **and** back into the same employee type (e.g., Wage to Wage or Salary to Salary). This will hire the employee back into the same employee record they had previously. Use this Job Aid to complete this process.
- Answer "No" if the employee is being rehired into a different HBO Agency or Locality **or** is being hired back as a different employee type (e.g., Wage to Salary or Salary to Wage). This creates a new employee record and hires the employee into it. Refer to the Job Aid titled **TLC and HBO Completing a New Hire and Benefit Enrollment** to complete this process. This Job Aid can be found on the Cardinal website in **Job Aids** under **Learning** or on the [Locality Users](#) page.

The **Personal Organizational Summary** page provides summarized information related to all current or previous jobs an employee has at the Commonwealth of Virginia. This page may also return results for people with no job information in Cardinal. A review of the information on this page is necessary to determine how to process the rehire.

Note: Personal data for the person being rehired will not be available to view or modify in Cardinal until the rehire is processed.

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 Rehire and Benefit Enrollment Overview

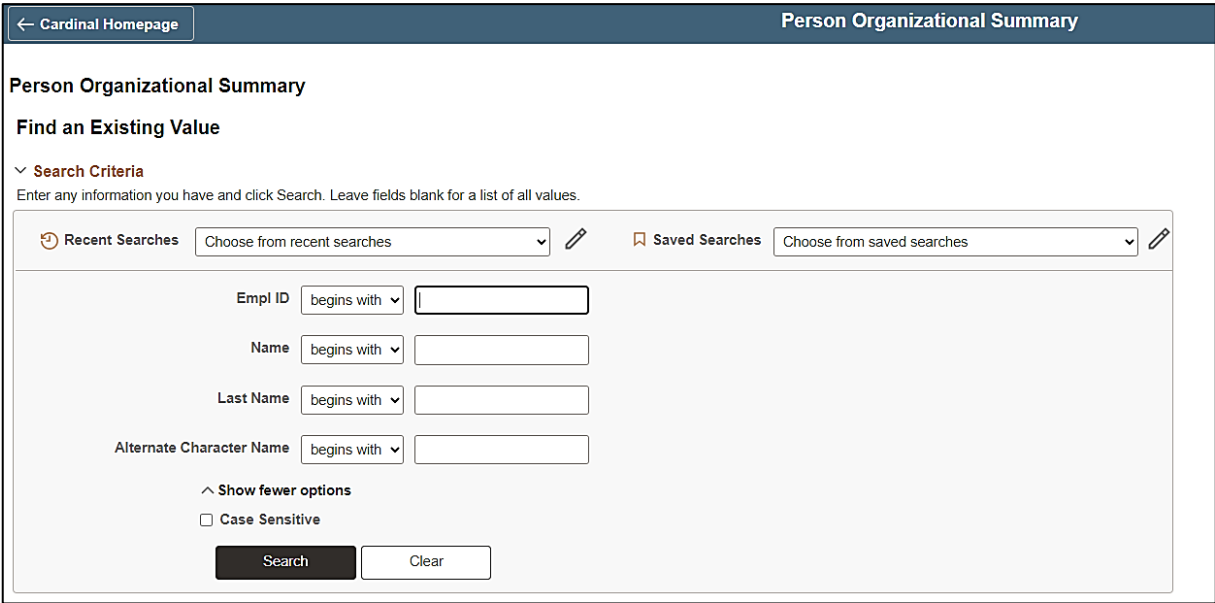

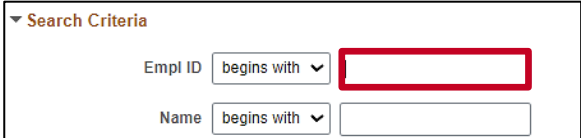
Revision History



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

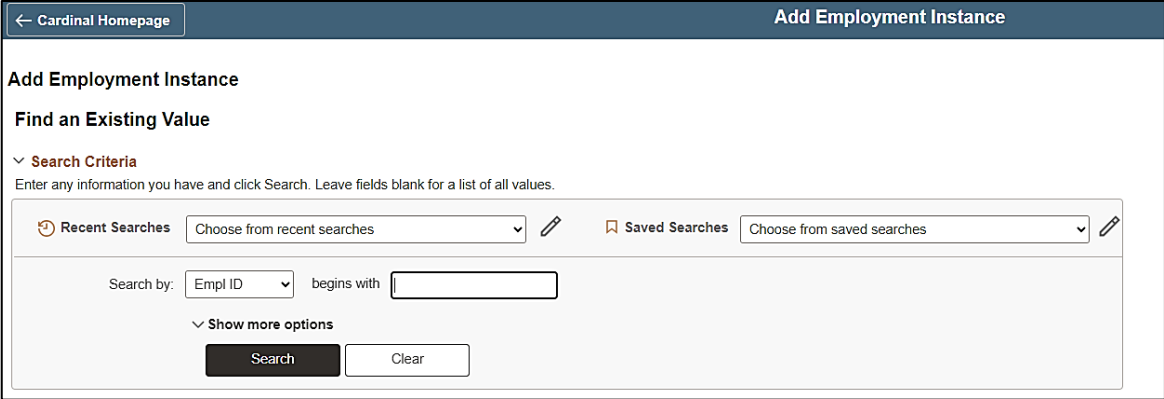

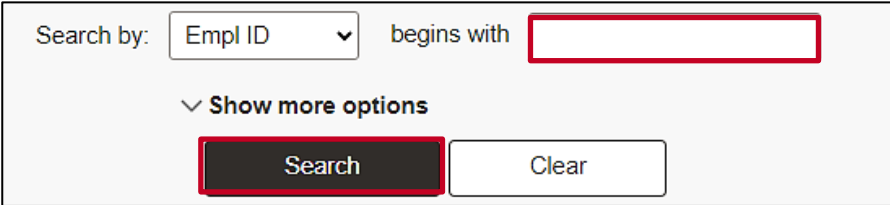
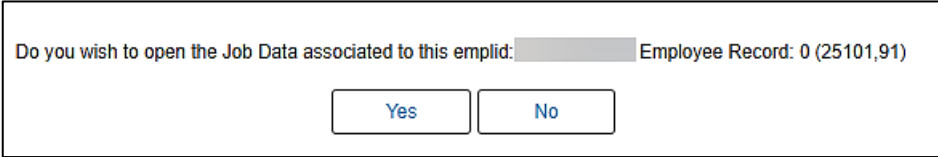
Rehiring an Employee


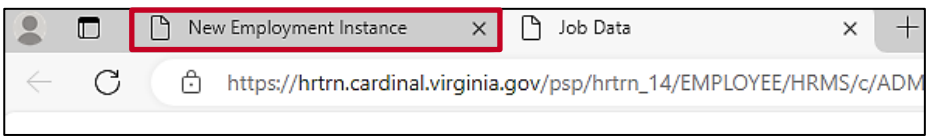
Before beginning, review the **Person Organizational Summary** page to get information about the employee's previous employment at the Commonwealth of Virginia.

Note: If the employee's previous employment with the Commonwealth of Virginia ended prior to 2020, only their name and employee ID will display on the **Person Organizational Summary** page. Research must be conducted in the legacy system. For further information and assistance, contact ihelp@dhrm.virginia.gov.

Step	Action
1.	Navigate to the Person Organizational Summary page using the following path: NavBar > Menu > Workforce Administration > Personal Information > Person Organizational Summary
<p>The Person Organizational Summary Find an Existing Value Search page displays.</p> 	
	<p>For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.</p>
2.	Enter the Employee's ID in the Empl ID field. 

Step	Action																										
	<p>Users can also search by name using the corresponding fields. However, it is recommended to use the Employee ID as it is a unique identifier for each employee.</p>																										
<p>3.</p>	<p>Click the Search button.</p> <div data-bbox="256 533 967 632" style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <div style="display: flex; justify-content: space-around; align-items: center;"> <div style="border: 2px solid red; padding: 5px 15px; background-color: #333; color: white; font-weight: bold;">Search</div> <div style="border: 1px solid #ccc; padding: 5px 15px;">Clear</div> </div> </div>																										
	<p>The Person Organizational Summary page displays showing the employee's previous job information.</p> <div data-bbox="186 722 1451 1045" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Person Organizational Summary</p> <p>JOHN DOE Person ID [REDACTED]</p> <hr/> <p>Employment Instances [Search] < > 1 of 1 View All</p> <p>ORG Instance 0 Last Hire 10/01/2013 Termination Date 12/30/2024 HR Status Inactive Payroll Status Terminated</p> <p>Assignments</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>Empl Record</th> <th>HR Status</th> <th>Payroll Status</th> <th>Date Last Change</th> <th>Business Unit</th> <th>Last Asgn Start</th> <th>Employee Class</th> <th>Term Date</th> <th>Action</th> <th>Action Reason</th> <th>Job Code</th> <th>Grade</th> <th>Benefits Status</th> </tr> </thead> <tbody> <tr> <td>0</td> <td>Inactive</td> <td>Terminated</td> <td>12/31/2024</td> <td>LOCAL</td> <td>10/01/2013</td> <td>TLC Employee</td> <td>12/30/2024</td> <td>Termination</td> <td>Resignation</td> <td>COVHBO</td> <td></td> <td>Terminated</td> </tr> </tbody> </table> <p style="margin-top: 10px;"> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> </p> </div>	Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Action	Action Reason	Job Code	Grade	Benefits Status	0	Inactive	Terminated	12/31/2024	LOCAL	10/01/2013	TLC Employee	12/30/2024	Termination	Resignation	COVHBO		Terminated
Empl Record	HR Status	Payroll Status	Date Last Change	Business Unit	Last Asgn Start	Employee Class	Term Date	Action	Action Reason	Job Code	Grade	Benefits Status															
0	Inactive	Terminated	12/31/2024	LOCAL	10/01/2013	TLC Employee	12/30/2024	Termination	Resignation	COVHBO		Terminated															
	<p>This page provides summarized information regarding any other jobs the person currently holds, or previously held, at the Commonwealth of Virginia. This information helps to determine how to process the employee in Cardinal.</p> <p>If there is no previous job information for the person in Cardinal, the Person Organizational Summary page displays with only the employee's name and Person ID. Research must be conducted in the legacy system. For further information and assistance, contact ihelp@dhrm.virginia.gov.</p> <div data-bbox="256 1352 1149 1528" style="border: 1px solid #ccc; padding: 10px; margin: 10px 0;"> <p>Person Organizational Summary</p> <p>[REDACTED] Person ID [REDACTED]</p> <p style="margin-top: 5px;"> <input type="button" value="Return to Search"/> <input type="button" value="Notify"/> </p> </div>																										
<p>4.</p>	<p>Navigate to the Add Employment Instance page using the following path:</p> <p>NavBar > Menu > Workforce Administration > Personal Information > Organizational Relationships > New Employment Instance</p>																										

Step	Action
	<p>The New Employment Instance Find an Existing Value Search page displays.</p> 
	<p>Users may not have to search and may be able to bypass step 5.</p>
<p>5.</p>	<p>Enter the Employee ID or Person ID and click the Search button.</p> 
	<p>The following Decision message displays.</p> 

Step	Action
6.	<p>For guidance on how to answer this question, review the following scenarios below:</p> <p>Scenario 1:</p> <p>Click the Yes button if the employee is being rehired back into the same Agency or Locality <u>and</u> back as the same employee type (e.g., wage to wage or salary to salary). This hires the employee back into the same employee record they had previously.</p> <div data-bbox="256 583 1198 787" style="border: 1px solid black; padding: 5px;"> <p>Do you wish to open the Job Data associated to this emplid: [redacted] Employee Record: 0 (25101,91)</p> <p style="text-align: center;"> <input data-bbox="565 703 730 756" type="button" value="Yes"/> <input data-bbox="738 703 889 756" type="button" value="No"/> </p> </div> <p>Scenario 2:</p> <p>Click the No button if the employee is being rehired into a different Agency or Locality <u>or</u> back into the same Agency or Locality but as a different employee type (e.g., wage to salaried). The New Employment Instance page displays. Clicking the Add Relationship button creates a new employee record that the employee is hired into. Refer to the Job Aid titled TLC HBO Completing a New Hire and Benefit Enrollment to finish this rehire. This Job Aid can be found on the Cardinal website in Job Aids under Learning or on the Locality Users page.</p> <div data-bbox="256 1071 800 1291" style="border: 1px solid black; padding: 5px;"> <p>New Employment Instance</p> <p>Empl ID [redacted]</p> <p>Empl Record 1</p> <p style="text-align: center;"><input data-bbox="446 1207 755 1249" type="button" value="Add Relationship"/></p> </div>
	<p>If “Yes” is selected, please go back and click the “X” to close the New Employment Instance tab at the top of your screen.</p> <div data-bbox="256 1407 1177 1543" style="border: 1px solid black; padding: 5px;">  </div>



TLC and HBO Completing a Rehire and Benefit Enrollment Overview

Step	Action
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The **Job Data** page displays the most recent transaction for the employee (with the **Action** of "Termination" and the **Reason** "Resignation" in this scenario).

Work Location | Job Information | Job Labor | Payroll | Salary Plan | Compensation

JOHN DOE
Employee

Empl ID [REDACTED]
Empl Record 0

Work Location Details [Search] | 1 of 1

*Effective Date: 12/31/2024 [Calendar] | Go To Row [+] [-]

Effective Sequence: 0 | *Action: Termination [Dropdown]

HR Status: Inactive | Reason: Resignation [Dropdown]

Payroll Status: Terminated | *Job Indicator: Primary Job [Dropdown]

Position Number: E070000F [Search] | TLC 048037000 Full Time Pos
[Override Position Data]

Position Entry Date: 10/01/2013 [Calendar] | Position Management Record

Regulatory Region: USA | United States

Company: E07 | Greenville County Schools

Business Unit: LOCAL | The Local Choice Participants

Department: 048037000 | Greenville Schools 12 Month

Department Entry Date: 10/01/2013

Location: OHB | DHRM Office of Health Benefits

Establishment ID: LOCAL [Search] | Localities | Date Created: 03/24/2025

Last Start Date: 10/01/2013 | Termination Date: 12/30/2024 | STD Claim Number [Input]

Override Last Date Worked | Layoff Notice Date [Calendar]

Recall Eligibility Flag

Last Date Worked: 12/30/2024

Turn Off Auto Pay
 Yes No

7. Click the **Add a Row** button (+) to add a new effective dated row.

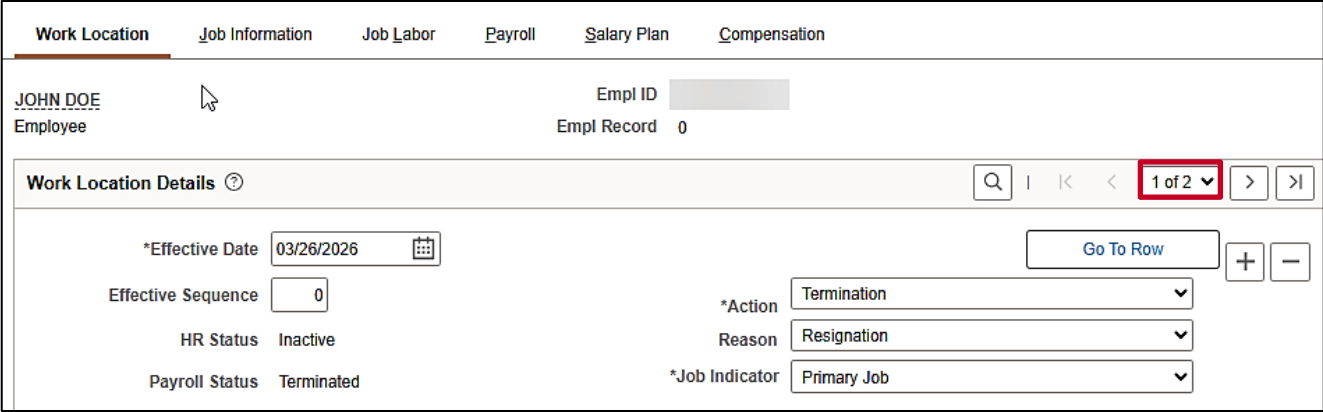
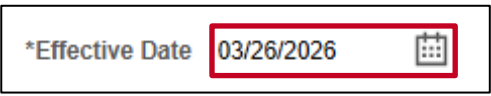
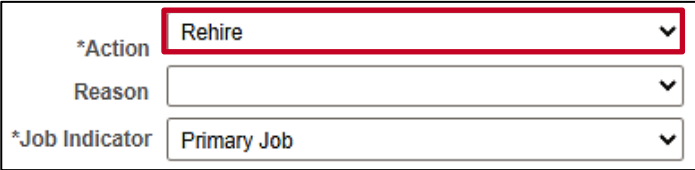

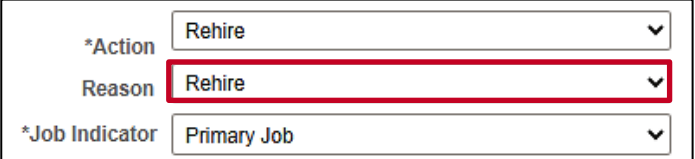
Work Location Details [Search] | 1 of 1



*Effective Date: 12/31/2024 [Calendar] | Go To Row [Red +] [-]

Effective Sequence: 0 | *Action: Termination [Dropdown]

HR Status: Inactive | Reason: Resignation [Dropdown]

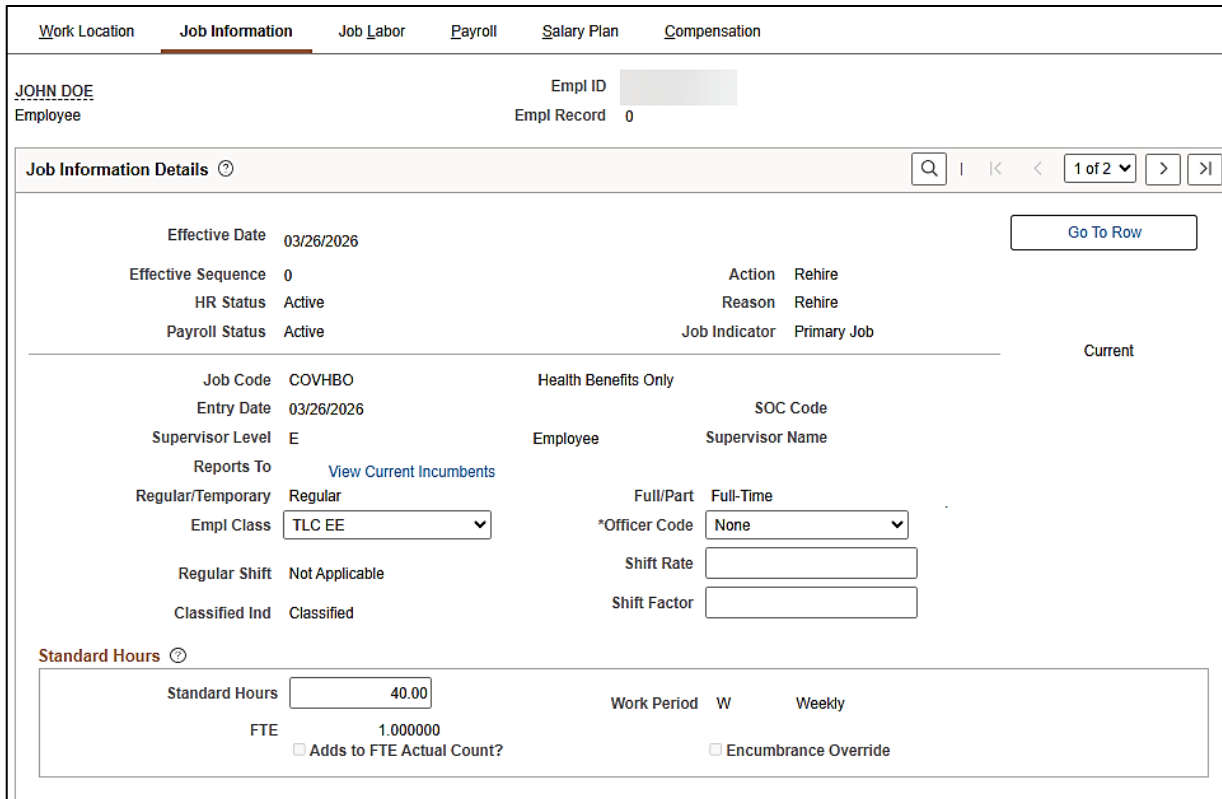
Payroll Status: Terminated | *Job Indicator: Primary Job [Dropdown]

Step	Action
	<p>The Job Data page refreshes with the new effective dated row (row “1 of 2” in this example).</p> 
8.	<p>The Effective Date field defaults to the current system date. Update to the date of the rehire as needed using the Effective Date Calendar icon.</p> 
9.	<p>Click the Action dropdown button and select “Rehire”.</p> 
	<p>The action of “Rehire” is only available if the employee has an historical job record (employee record) in Cardinal. When Cardinal was established, all employee personal data from the legacy system was converted into Cardinal, but not all inactive employment history (job data) was converted. Therefore, the action of “Hire” and reason of “New Hire” must be used if no Cardinal employment history (job record) exists. The Employment Data page is used to address prior service using the appropriate fields.</p>
10.	<p>Click the Reason dropdown button and select the applicable reason for “Rehire”.</p> 

Step	Action
	For further information pertaining to valid Action and Reason code combinations, see the Job Aid titled TLC HBO Action Reason Codes . This Job Aid can be found on the Cardinal website in Job Aids under Learning or on the Locality Users page.
<p>A message displays asking the user to confirm that the effective date matches the Job Begin Date.</p> <div style="border: 1px solid black; padding: 10px; margin: 10px 0;"> <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> <div style="text-align: center; margin-top: 10px;"> <input type="button" value="OK"/> </div> </div>	
11.	Confirm the effective date and click the OK button. <div style="border: 1px solid black; padding: 5px; margin: 10px 0; text-align: center;"> <input type="button" value="OK"/> </div>
12.	Enter the Position Number in the Position field and press the Tab key. <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> Position Number <input style="border: 2px solid red;" type="text"/> </div>
	The remaining Position data populates based upon the Position Number that was entered. Review the information.
13.	Click the Job Information tab. <div style="border: 1px solid black; padding: 5px; margin: 10px 0; display: flex; gap: 10px;"> Work Location Job Information Job Labor Payroll Salary Plan Compensation </div>

Step	Action
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The **Job Information** page displays.



Work Location | **Job Information** | Job Labor | Payroll | Salary Plan | Compensation

JOHN DOE Employee | Empl ID [REDACTED] | Empl Record 0

Job Information Details

Effective Date: 03/26/2026 | Action: Rehire | Reason: Rehire | Job Indicator: Primary Job | Current

Job Code: COVHBO | Health Benefits Only | SOC Code

Entry Date: 03/26/2026 | Supervisor Level: E | Employee | Supervisor Name

Reports To: View Current Incumbents

Regular/Temporary: Regular | Full/Part: Full-Time

Empl Class: **TLC EE** | *Officer Code: None

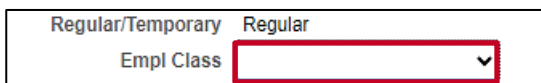
Regular Shift: Not Applicable | Shift Rate: [REDACTED]

Classified Ind: Classified | Shift Factor: [REDACTED]

Standard Hours: 40.00 | Work Period: W Weekly

FTE: 1.000000 | Add to FTE Actual Count? [] | Encumbrance Override []

14. Click the **Empl Class** dropdown button and select the applicable Employee Class. This is a required field.
 - a. If the employee is assigned to a TLC position, select the “TLC EE” value
 - b. If the employee is assigned to an HBO position, select the value that describes the employee filling the job (e.g., ONC, OTO, etc.)

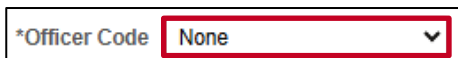


Regular/Temporary: Regular

Empl Class: [REDACTED]

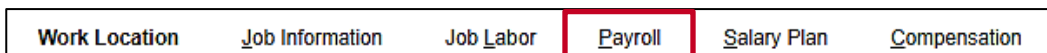


The **Officer Code** field defaults to “None”. Do not change.



*Officer Code: None

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



Work Location | Job Information | Job Labor | **Payroll** | Salary Plan | Compensation

Step	Action
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The **Payroll** page displays.



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

16.

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



HR and Benefits Job Aid

TLC and HBO Completing a Rehire and Benefit Enrollment Overview

Step	Action
	<p>The Employee Type field defaults to “S” (Salaried). Do not change. The Holiday Schedule field defaults to “NOHOL”. Do not change.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Pay Group <input type="text" value="MNP"/> Non-Payroll</p> <p>Employee Type <input type="text" value="S"/> Salaried Holiday Schedule <input type="text" value="NOHOL"/> LOCALITY</p> </div>
17.	<p>Click the Tax Location Code Look up icon and select the applicable code based on the location of the employee’s office.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Tax Location Code <input type="text"/></p> </div>
18.	<p>Click the Compensation tab.</p> <div style="border: 1px solid black; padding: 5px;"> <p>Work Location Job Information Job Labor Payroll Salary Plan Compensation</p> </div>

The **Compensation** page displays.

Work Location Job Information Job Labor Payroll Salary Plan **Compensation**

JOHN.DOE Employee Empl ID [REDACTED] Empl Record 0

Compensation Details 1 of 2

Effective Date 03/26/2026 [Go To Row](#)

Effective Sequence 0 Action Rehire

HR Status Active Reason Rehire

Payroll Status Active Job Indicator Primary Job Current

Compensation Rate 2,083.333333 *Frequency Monthly

> Comparative Information

> Pay Rates



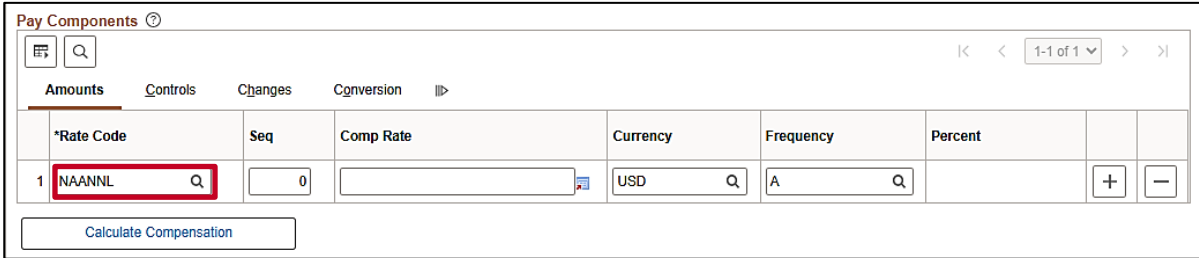

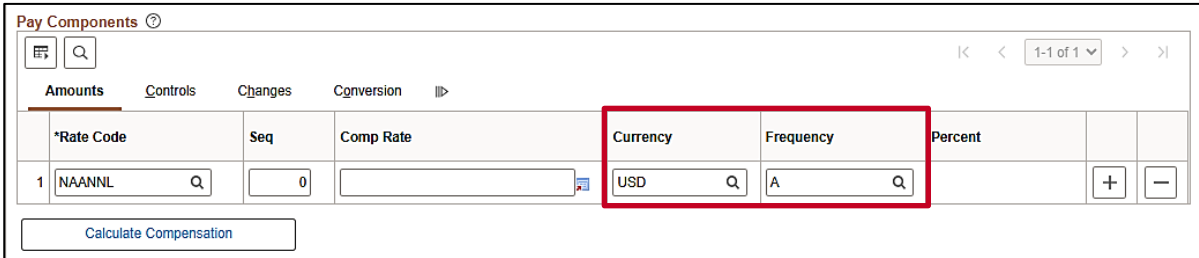


[Default Pay Components](#)

Pay Components 1-1 of 1

Amounts	Controls	Changes	Conversion		
*Rate Code	Seq	Comp Rate	Currency	Frequency	Percent
1 <input type="text"/>	<input type="text" value="0"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>



[Calculate Compensation](#)

Job Data Employment Data Earnings Distribution Benefits Program Participation

Step	Action
19.	<p>Click the Frequency Look up button In the Compensation Details section and select “M” (Monthly).</p> 
20.	<p>Click the Default Pay Components button.</p> 
21.	<p>Click the Rate Code Look up icon in the Pay Components section and select “NAANNL”.</p> 
	<p>The Currency and Frequency fields default based on the Rate Code selected. Do not change.</p> 
22.	<p>Click the Calculate Compensation button.</p> 
23.	<p>Click the Benefits Program Participation link at the bottom of the page.</p> 

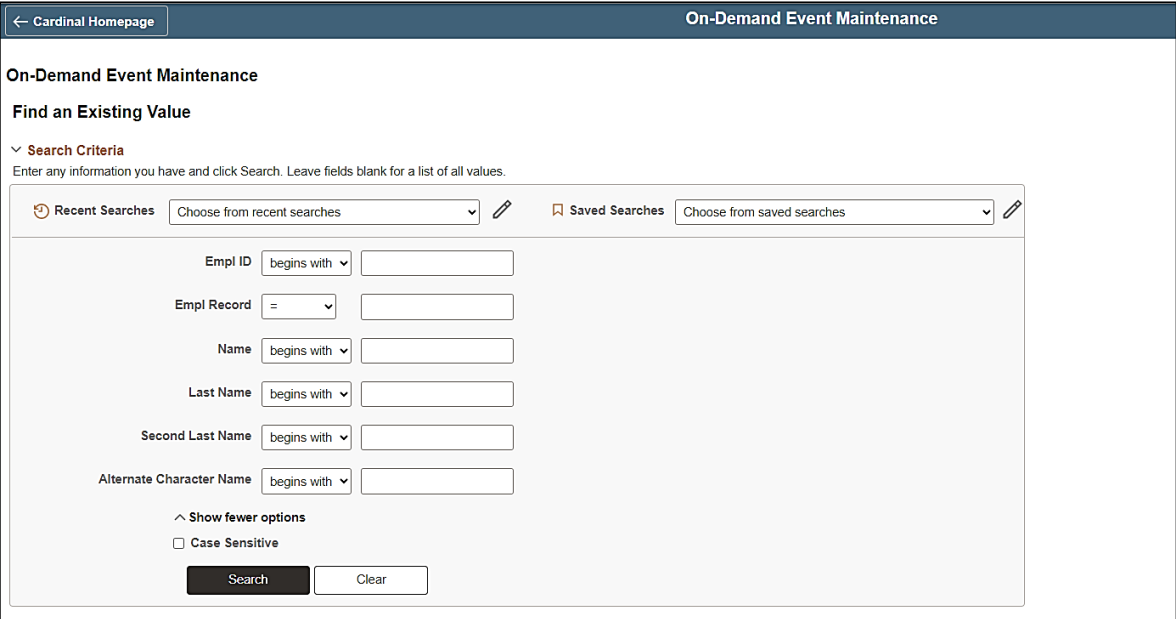


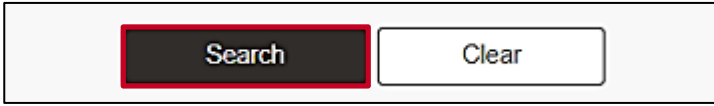


Step	Action
	The Benefit Program Participation page displays.
<div style="border: 1px solid black; padding: 10px;"> <div style="border-bottom: 1px solid black; padding-bottom: 5px;"> <p>Benefit Program Participation</p> </div> <div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 30%;"> <p><u>JOHN DOE</u> Employee</p> </div> <div style="width: 30%;"> <p>Empl ID </p> <p>Empl Record 0</p> </div> </div> <div style="border-top: 1px solid black; padding-top: 5px;"> <p>Benefit Status [Q] < > 1 of 2</p> <div style="display: flex; justify-content: space-between; align-items: flex-start; margin-top: 10px;"> <div style="width: 60%;"> <p>Benefit Record Number 0 ↻</p> <p>Effective Date 03/26/2026</p> <p>Effective Sequence 0</p> <p>HR Status Active</p> <p>Payroll Status Active</p> </div> <div style="width: 35%;"> <p>Action Rehire</p> <p>Reason Rehire</p> <p>Job Indicator Primary Job</p> </div> <div style="width: 20%; text-align: right;"> <p>Go To Row</p> </div> </div> <div style="margin-top: 10px;"> <p>*Benefits System Benefits Administration Current</p> <p>Annual Benefits Base Rate USD Benefits Employee Status Active</p> <p style="text-align: right;">ACA Eligibility Details</p> </div> <div style="border-top: 1px solid #ccc; padding-top: 5px; margin-top: 10px;"> <p>Benefits Administration Eligibility ?</p> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="width: 30%;"> <p>BAS Group ID Q</p> <p>Elig Fld 1 Q</p> <p>Elig Fld 4 Q</p> <p>Elig Fld 7 Q</p> </div> <div style="width: 30%;"> <p>Elig Fld 2 048037000 Q</p> <p>Elig Fld 5 Q</p> <p>Elig Fld 8 12-12 Q</p> </div> <div style="width: 30%;"> <p>Elig Fld 3 N Q</p> <p>Elig Fld 6 Q</p> <p>Elig Fld 9 TF-GB Q</p> </div> </div> </div> </div> <div style="border-top: 1px solid black; padding-top: 5px; margin-top: 10px;"> <p>Benefit Program Participation Details [Q] < > 1 of 1 View All</p> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="width: 30%;"> <p>Effective Date 10/01/2013</p> <p>Benefit Program 030</p> </div> <div style="width: 30%;"> <p>Currency Code USD</p> <p>TLC 048037000 Ben Program</p> </div> </div> </div> <div style="border-top: 1px solid black; padding-top: 5px; margin-top: 10px;"> <p style="display: flex; justify-content: space-between; font-size: small;"> Job Data Employment Data Earnings Distribution Benefits Program Participation </p> </div> </div>	

Step	Action												
24.	<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> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">BAS Group ID <input type="text"/></td> <td style="width: 33%;">Elig Fld 2 <input type="text"/></td> <td style="width: 33%;">Elig Fld 3 <input type="text"/></td> </tr> <tr> <td>Elig Fld 1 <input type="text"/></td> <td>Elig Fld 5 <input type="text"/></td> <td>Elig Fld 6 <input type="text"/></td> </tr> <tr> <td>Elig Fld 4 <input type="text"/></td> <td>Elig Fld 8 <input type="text"/></td> <td>Elig Fld 9 <input type="text"/></td> </tr> <tr> <td>Elig Fld 7 <input type="text"/></td> <td></td> <td></td> </tr> </table> </div>	BAS Group ID <input type="text"/>	Elig Fld 2 <input type="text"/>	Elig Fld 3 <input type="text"/>	Elig Fld 1 <input type="text"/>	Elig Fld 5 <input type="text"/>	Elig Fld 6 <input type="text"/>	Elig Fld 4 <input type="text"/>	Elig Fld 8 <input type="text"/>	Elig Fld 9 <input type="text"/>	Elig Fld 7 <input type="text"/>		
BAS Group ID <input type="text"/>	Elig Fld 2 <input type="text"/>	Elig Fld 3 <input type="text"/>											
Elig Fld 1 <input type="text"/>	Elig Fld 5 <input type="text"/>	Elig Fld 6 <input type="text"/>											
Elig Fld 4 <input type="text"/>	Elig Fld 8 <input type="text"/>	Elig Fld 9 <input type="text"/>											
Elig Fld 7 <input type="text"/>													
	<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>												
25.	<p>Click the Save button.</p> <div data-bbox="256 1108 881 1205" style="border: 1px solid black; padding: 5px;"> Save Return to Search Notify Refresh </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 1170 1728" style="border: 1px solid gray; padding: 10px; margin: 10px auto; width: 80%;"> <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> <div style="text-align: right; margin-top: 10px;"> OK Cancel </div> </div>													
26.	<p>Click the OK button.</p> <div data-bbox="256 1818 553 1902" style="border: 1px solid black; padding: 5px;"> OK Cancel </div>												

Rehire Benefit Enrollment

Now that the Rehire processing is complete, the Benefits Administrator will be able to complete the benefit enrollment elections for the rehired 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
<p>The On-Demand Event Maintenance Find an Existing Value Search page displays.</p> 	
2.	Enter the employee's Employee ID in the Empl ID field. 
	Searches can also be performed using the employee's name. However, it is recommended to use the Employee ID as every employee will have a unique Employee ID.
3.	Click the Search button. 



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 Status Update

Event Date Class

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 Empl Record 0

Schedule/Prepare Activity Pending Activities 2 Show Activities Action

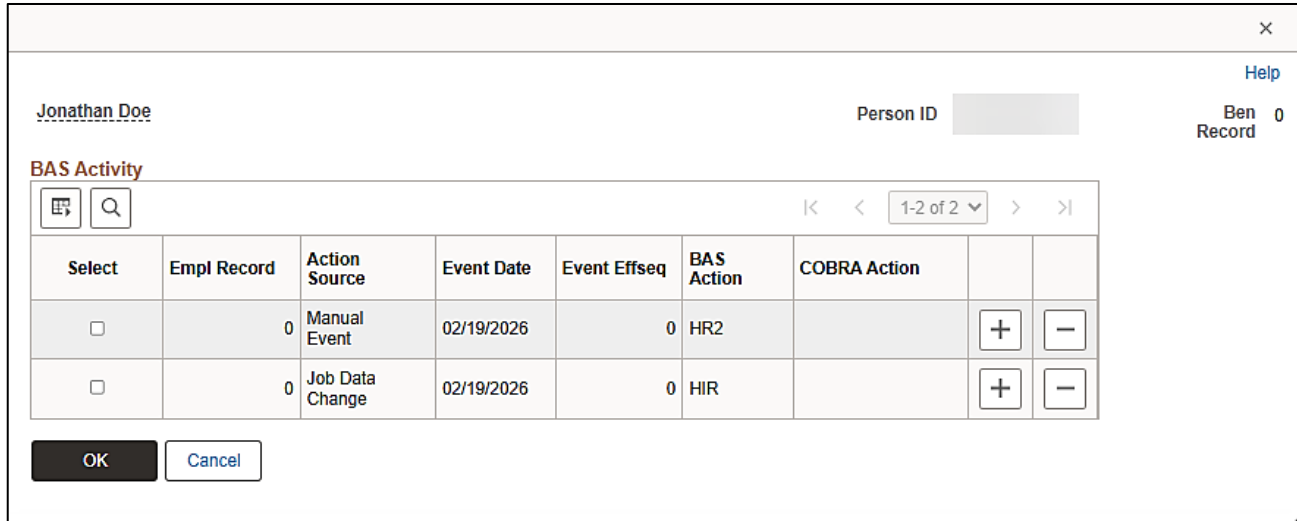
5. Click the **Show Activities** button.

Activity Date 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 [redacted] Ben Record 0

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

Deduction Frequency Annual Frequency

Entered 0 of 0

Errors 0 Finalize/Apply Defaults

Run Date

Process Indicator Normal Processing

8. Review the **Activity Date** field. This is the date of the employee's New Hire transaction completed by HR Administrator. This date will impact the Benefits enrollment begin date. Therefore, if this date is not accurate, work with the HR Administrator to correct prior to processing the rehire benefits enrollment.

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.

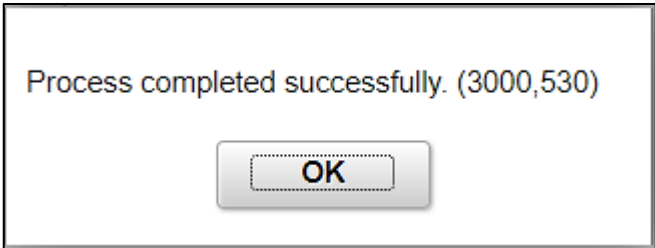
Note: This will process and close the HR2 Benefit Event.

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

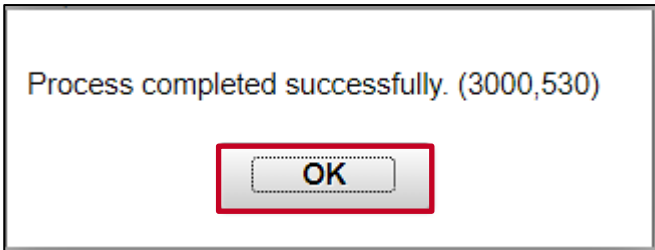
Pending Activities 2 Action HR2

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 [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 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 Rehire and Benefit Enrollment Overview

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>



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

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

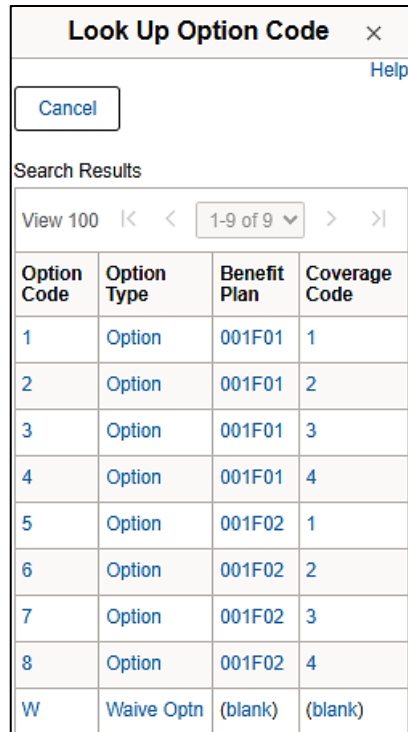
The screenshot shows the 'BenAdmin Data Entry' window with the 'Option Election' tab selected. At the top, there are navigation tabs: 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. Below these, the user information is displayed: 'Sched ID EM00', 'Empl ID [redacted]', 'Jonathan Doe', 'Ben Record 0', and 'Event ID 2'. There are also fields for 'Event Data 02/19/2026 Initial Enrollment', 'Excess Credit Rollover To', and 'Forfeit Excess Credits'. A section titled 'Available Plans and Options' is expanded, showing 'Plan Type 10 : Medical'. Within this section, there is an 'Option Code' field with a magnifying glass icon, a 'Health Provider ID' field, and a 'Previously Seen' checkbox. Below this is a 'Special Requirements' section. A 'Dependents/Beneficiaries' section contains an 'Enroll All' button and a table with columns: '#ID', 'Name', 'Relationship to Employee', 'Health Provider ID', 'Previously Seen', 'Covered Person Type', and 'Age Limit Flag'. The table has one row with a search icon in the first column, a search icon in the second column, a search icon in the fourth column, a checkbox in the fifth column, a search icon in the sixth column, a search icon in the seventh column, and a minus sign in the eighth column. At the bottom of the window are 'OK', 'Cancel', and 'Apply' buttons, and a 'Refresh' button in the bottom right corner.

13. Click the **Option Code Look up** icon within the **Plan Type 10: Medical** section.

This is a close-up of the 'Option Code' field within the 'Plan Type 10 : Medical' section. The field contains the text 'Option Code' followed by a magnifying glass icon. The magnifying glass icon is highlighted with a red rectangular box.

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

The **Look Up Option Code** page displays in a pop-up window.



Look Up Option Code			
			Help
Cancel			
Search Results			
View 100 < < 1-9 of 9 > >			
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)

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

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

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

Event Data 02/19/2026 Initial Enrollment

Ben Record 0 Event ID 2

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"/>			<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 **Dependents / Beneficiaries** page displays.

BenAdmin Data Entry

Event / Participant Selection Option Election Dependents / Beneficiaries

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	

Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
----	---------	-----------------------------------

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

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

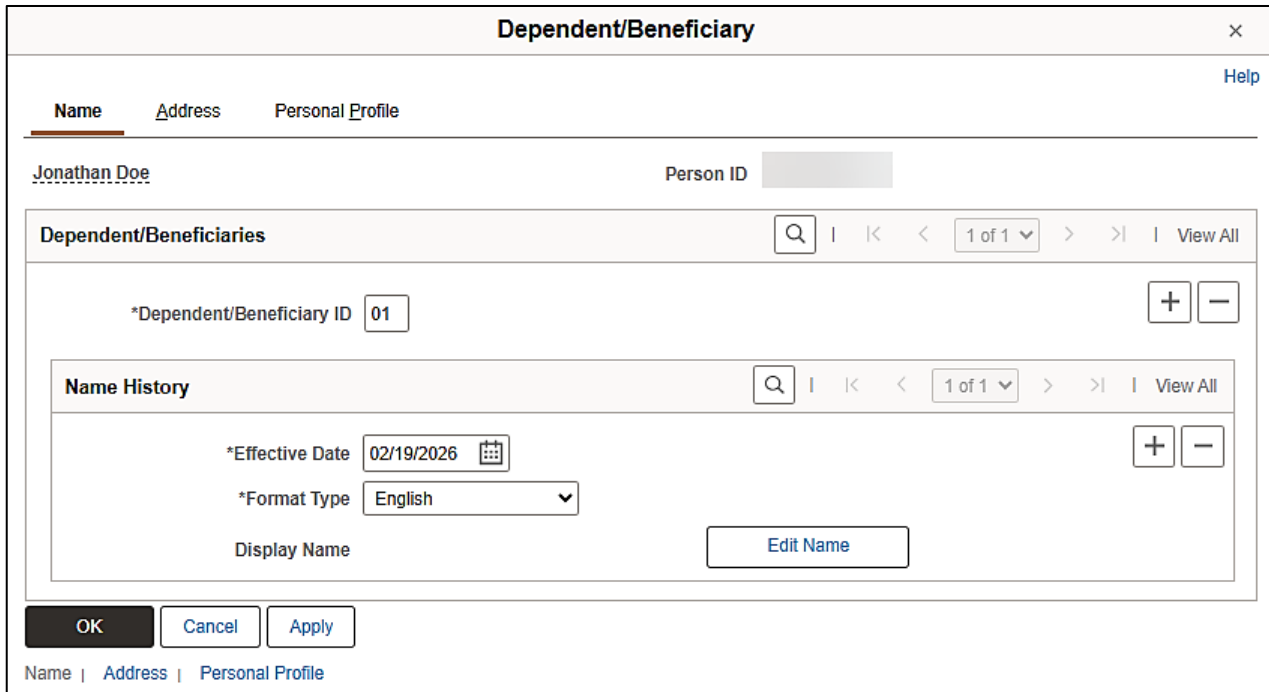
Dependent/Beneficiaries Currently on Record

Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth

[Change/Add Dependent Data](#)

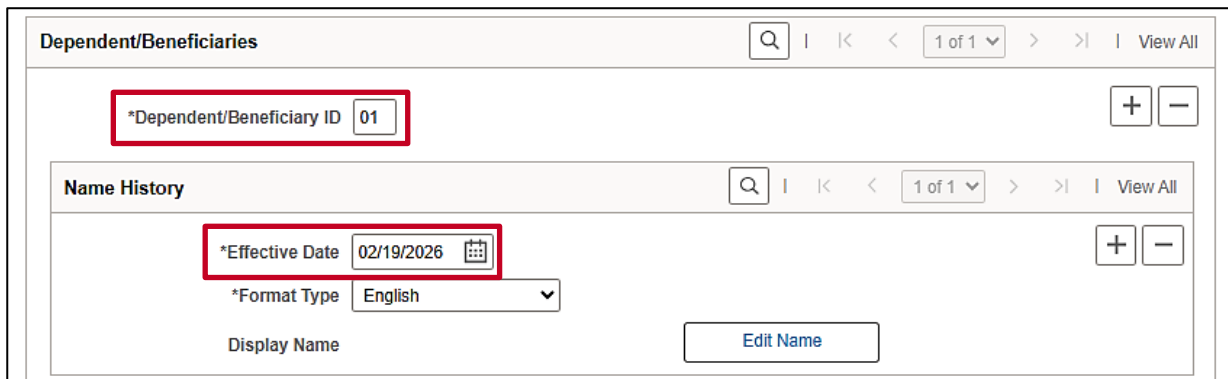
Step	Action
------	--------

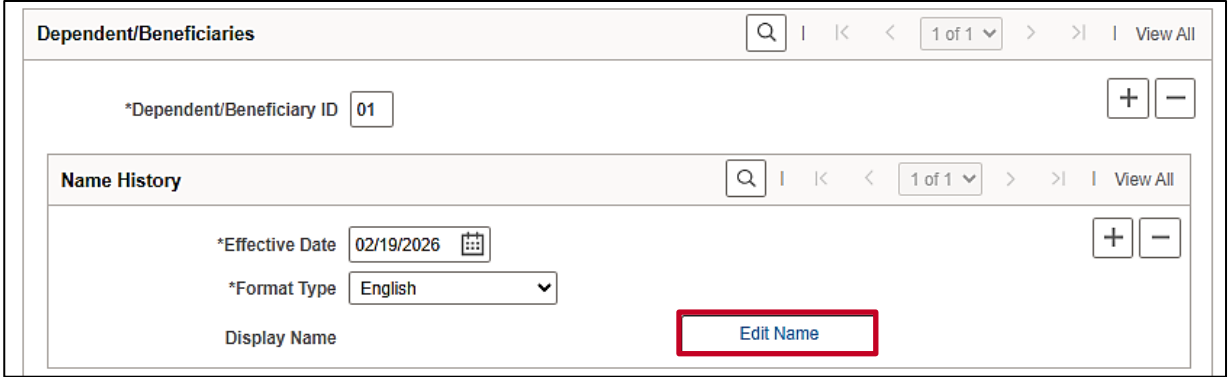
The **Dependent/Beneficiary** page displays in a pop-up window.



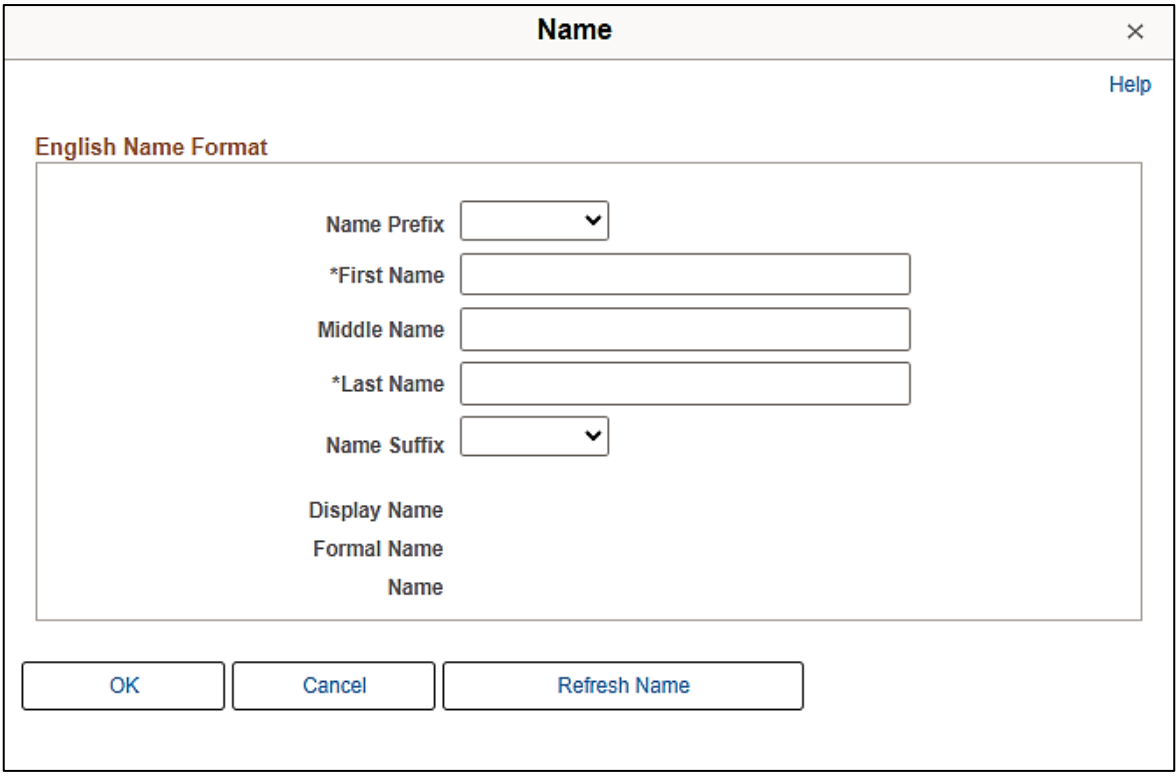

The **Dependent/Beneficiary ID** field will default to “01” for the first dependent and increment by 1 for each additional dependent subsequently added.

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



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

Step	Action
18.	<p>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.</p> <div data-bbox="256 485 1453 961" style="border: 1px solid black; padding: 10px;"> <p style="text-align: center;">Name ×</p> <p style="text-align: right;">Help</p> <p>English Name Format</p> <p>Name Prefix <input type="text"/></p> <p>*First Name <input style="border: 2px solid red;" type="text"/></p> <p>Middle Name <input type="text"/></p> <p>*Last Name <input style="border: 2px solid red;" type="text"/></p> <p>Name Suffix <input type="text"/></p> </div>
19.	<p>Click the OK button.</p> <div data-bbox="256 1052 768 1136" style="border: 1px solid black; padding: 5px;"> <p><input style="border: 2px solid red;" type="button" value="OK"/> <input type="button" value="Cancel"/> <input type="button" value="Apply"/></p> </div>

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

Dependent/Beneficiary ×

[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

Display Name Janet Doe

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

Step	Action
20.	Click the Address tab. 

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

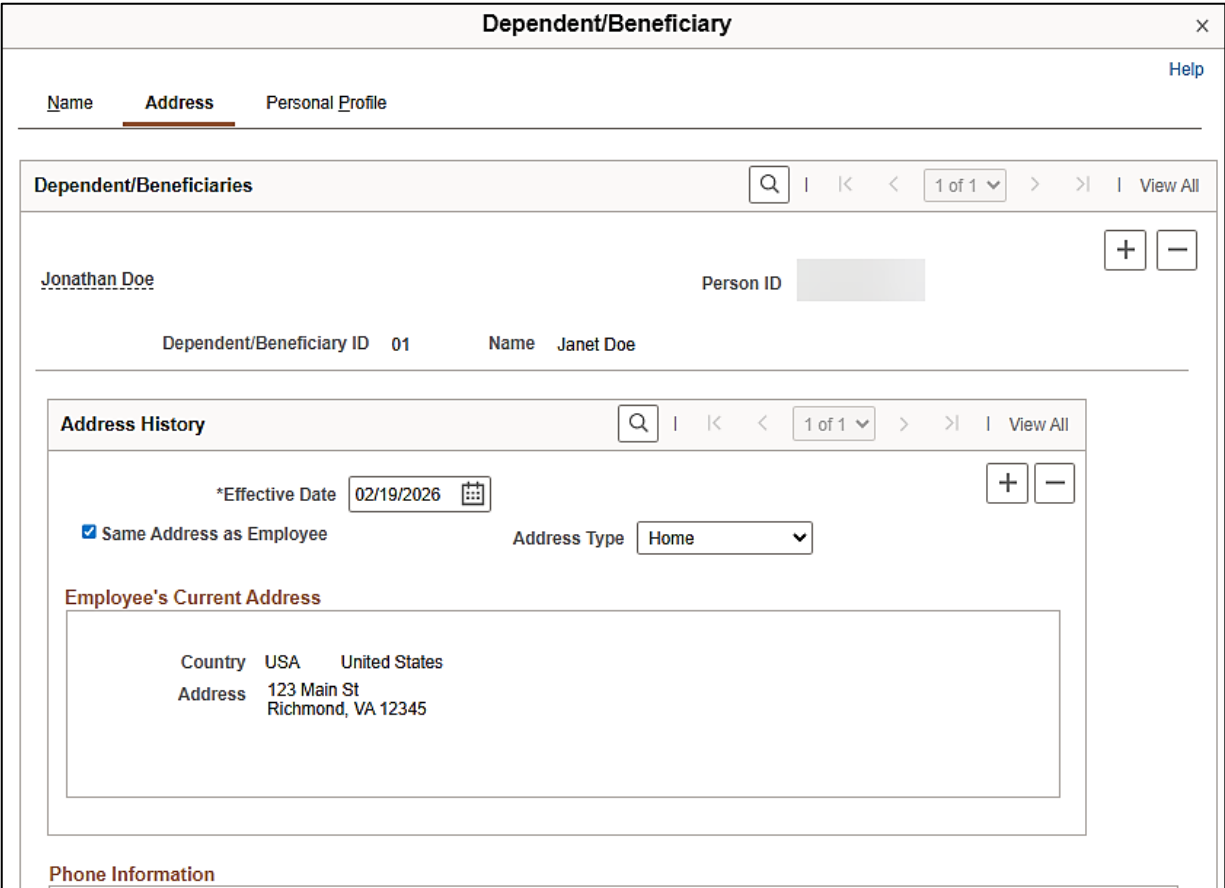

Address
Edit Address

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 [Search] [Previous] [Next] [1 of 1] [View All]</p><p>*Effective Date: 02/19/2026 [Calendar] [Add] [Remove]</p><p><input checked="" type="checkbox"/> Same Address as Employee Address Type: [Dropdown]</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 [Search] [Previous] [Next] [1 of 1] [View All]</p><p>*Effective Date: 02/19/2026 [Calendar] [Add] [Remove]</p><p><input type="checkbox"/> Same Address as Employee Address Type: [Dropdown]</p><p>Address</p><p>Country: USA [Search] United States</p><p>Address: [Text Area]</p><p>[Edit Address]</p></div>

Step	Action
	<p>The Address page refreshes with Address History section with the dependent's address information displayed in the Address History section.</p> 
22.	<p>Click the Personal Profile tab.</p> 

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

The **Personal Profile** page displays.

Dependent/Beneficiary x

Name Address Personal Profile Help

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

Personal History
 | < > 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

	<p>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).</p>
23.	<p>Click the Date of Birth Calendar icon and select the dependent's date of birth.</p> <div style="border: 1px solid black; padding: 5px; margin: 10px 0;"> <div style="border-bottom: 1px solid black; display: flex; justify-content: space-between;"> Dependent/Beneficiary ID 01 Janet Doe </div> <div style="display: flex; justify-content: space-between;"> *Date of Birth <div style="border: 2px solid red; padding: 2px;"> <input type="text" value=""/> <input type="button" value="📅"/> </div> </div> </div>
	<p>The Effective Date in the Personal History section defaults to the date of rehire. Do not change.</p>

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. 



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

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

Dependent/Beneficiary x

[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 Disabled Smoker

As of

As of

As of

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"/>	<input type="text" value=""/>	<input type="text" value=""/> <input type="text" value=""/>

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, as soon as the SSN is obtained, it should be 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; text-align: center;">OK</div> <div style="border: 1px solid #ccc; padding: 5px 15px; text-align: center;">Cancel</div> <div style="border: 1px solid #ccc; padding: 5px 15px; text-align: center;">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;"> <div style="text-align: right; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> × Help </div> <div style="display: flex; justify-content: space-between; font-size: small; border-bottom: 1px solid #ccc; padding-bottom: 5px;"> Event / Participant Selection Option Election Dependents / Beneficiaries </div> <div style="padding: 10px 0;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 33%;">Schedule ID EM00</td> <td style="width: 33%;">Employee ID [REDACTED]</td> <td style="width: 33%;">Jonathan Doe</td> </tr> <tr> <td>Event ID 2</td> <td>Event Data 02/19/2026</td> <td>Initial Enrollment</td> </tr> <tr> <td>Benefit Record 0</td> <td>Excess Credit Rollover To</td> <td>Forfeit Excess Credits</td> </tr> </table> <p style="font-size: small; margin-top: 5px;">Dependent/Beneficiaries Currently on Record</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <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 style="font-size: small; margin-top: 5px;">Change/Add Dependent Data</p> <p style="font-size: small; margin-top: 5px;">Elections Requiring Supplemental Information</p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: small;"> <tr> <td style="width: 33%;">10</td> <td style="width: 33%;">Medical</td> <td style="width: 33%; text-align: right;">Enroll Dependents</td> </tr> </table> <div style="margin-top: 10px; display: flex; justify-content: space-between;"> <div style="display: flex; gap: 5px;"> <div style="background-color: #333; color: white; padding: 5px 15px; text-align: center;">OK</div> <div style="border: 1px solid #ccc; padding: 5px 15px; text-align: center;">Cancel</div> <div style="border: 1px solid #ccc; padding: 5px 15px; text-align: center;">Apply</div> </div> <div style="border: 1px solid #ccc; padding: 5px 15px; text-align: center; font-size: small;">Refresh</div> </div> <p style="font-size: x-small; margin-top: 5px;">Event / Participant Selection Option Election Dependents / Beneficiaries</p> </div> </div>		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	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Doe,Janet	Spouse	Approved Dependent	03/01/2003	10	Medical	Enroll Dependents
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																			
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 English

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.



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 black; padding: 5px; margin-top: 10px;"> Event / Participant Selection Option Election Dependents / Beneficiaries </div>
-----	---



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

The **Option Election** page displays.

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

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="256 470 638 594" 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="256 781 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: 20%;">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: 10%;">Age Limit Flag</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td style="border: 2px solid red; text-align: center;"> <input style="width: 90%;" type="text"/> <input style="width: 10%; height: 15px;" type="button" value="Q"/> </td> <td></td> <td></td> <td style="border: 1px solid black; text-align: center;"> <input style="width: 90%;" type="text"/> </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;"><input style="width: 20px; height: 15px;" type="button" value="-"/></td> </tr> <tr> <td colspan="8" style="border: 1px solid black; padding: 2px;"> <div style="border: 2px solid red; padding: 2px; display: inline-block; width: 20px; height: 15px; text-align: center;">+...</div> </td> </tr> </tbody> </table> </div>	*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag		<input style="width: 90%;" type="text"/> <input style="width: 10%; height: 15px;" type="button" value="Q"/>			<input style="width: 90%;" type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input style="width: 20px; height: 15px;" type="button" value="-"/>	<div style="border: 2px solid red; padding: 2px; display: inline-block; width: 20px; height: 15px; text-align: center;">+...</div>							
*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag																			
<input style="width: 90%;" type="text"/> <input style="width: 10%; height: 15px;" type="button" value="Q"/>			<input style="width: 90%;" type="text"/>	<input type="checkbox"/>		<input type="checkbox"/>	<input style="width: 20px; height: 15px;" type="button" value="-"/>																		
<div style="border: 2px solid red; padding: 2px; display: inline-block; width: 20px; height: 15px; text-align: center;">+...</div>																									



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

The **Option Election** page redisplay.

BenAdmin Data Entry x

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

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

Dependents/Beneficiaries

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

38. Click the **OK** button.



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

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

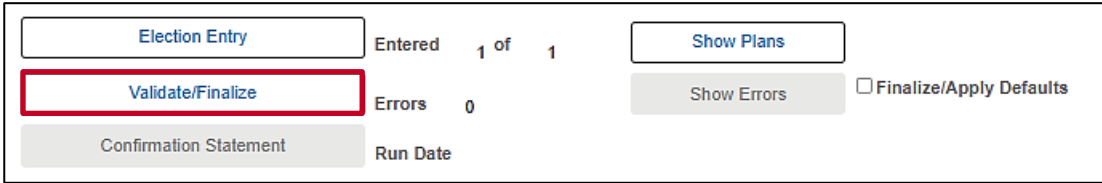
Jonathan Doe Person ID [redacted] Ben Record 0

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 data-bbox="256 535 1352 716" style="border: 1px solid black; padding: 5px;">  </div>
<p>A Confirmation message displays in a pop-up window once the automated program completes.</p> <div data-bbox="493 800 1143 1045" style="border: 1px solid black; padding: 10px; text-align: center;"> <p>Process completed successfully. (3000,530)</p> <p>OK</p> </div>	
41.	<p>Click the OK button to close the message.</p> <div data-bbox="256 1136 906 1381" style="border: 1px solid black; padding: 10px; text-align: center;"> <p>Process completed successfully. (3000,530)</p> <p>OK</p> </div>



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

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. Confirm that the **Status** is “Finalized - Enrolled” and the **Event Status** is “Closed to 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 Finalized - Enrolled** Class HIR [Event Status Update](#)

Prepare Options **Event Status Closed to Processing**