
BN361 Creating and Completing a Life Event on Behalf of an Employee**Creating and Completing a Life Event on Behalf of an Employee Overview**

This Job Aid provides the step-by-step instructions utilized by an Agency Benefits Administrator (BA) to create and complete a manual Benefit Event (Life Event) on behalf of the employee.

This process is utilized when the employee does not initiate the qualifying Life Event through Employee Self-Service (ESS).

This Job Aid also contains sections that provide the step-by-step instructions utilized by an Agency BA to complete the following after the Benefit Event is completed and finalized:

- Viewing the employee's benefits information to validate accuracy
- Viewing/printing the Confirmation Statement for the employee

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



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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
1/14/2026	Clarification regarding birth events and tag along in the Creating a Birth Event on Behalf of an Employee (with a tag along dependent) section, 3 rd bullet.
12/8/2025	Notes added to all sections providing additional information regarding the Schedule/Prepare Activity button. Language added regarding the use of special characters in name fields.
3/1/2025	Updated the screenshots of the Search pages. Added reference information to the Overview of the Cardinal HCM Search Pages Job Aid.

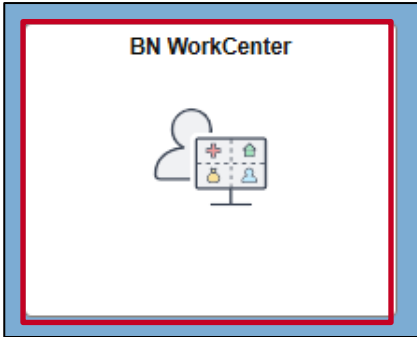
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Adding Dependent(s)

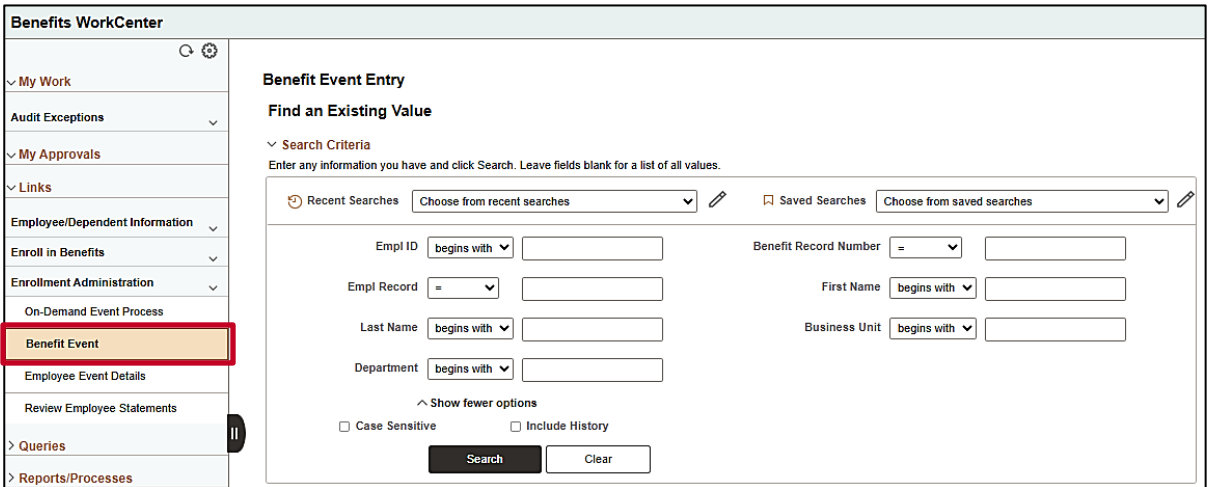
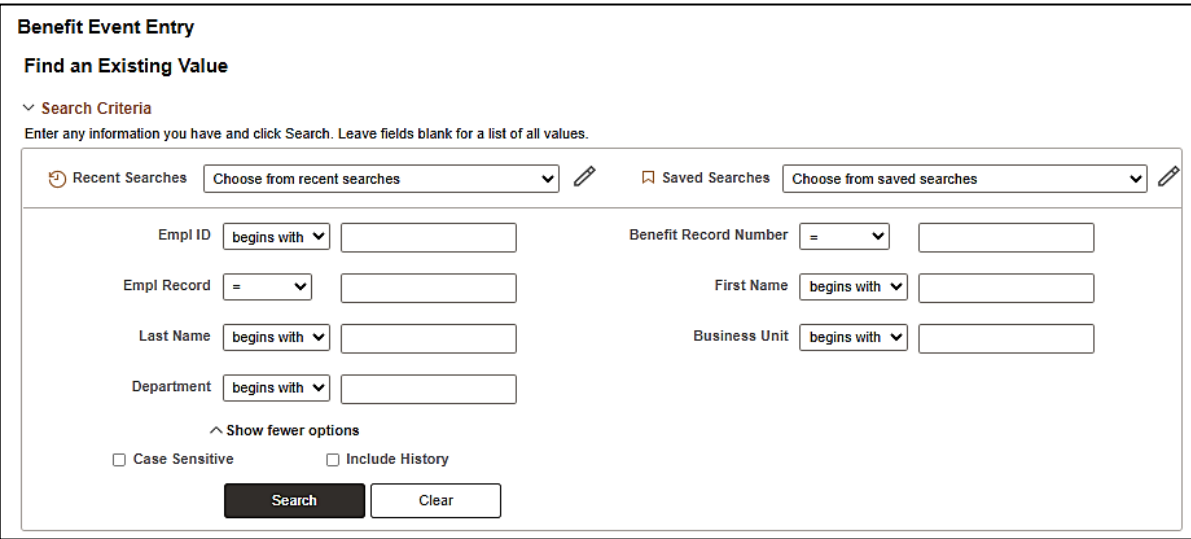
This section of the Job Aid should be referenced when creating and processing a Life Event on behalf of the employee wherein one or more dependents is being added to the employee's coverage (marriage, birth, adoption, etc.). The steps included in this section of the Job Aid are based on the example scenario below.

Scenario: An employee got married on 4/16/2026. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 4/19/2026 to add their spouse as a dependent and enroll them in their benefits. Additionally, a stepchild will be added and enrolled in the employee's benefits. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). The BN Administrator will need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being added to the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in the system.

Step	Action
1.	Navigate to the Benefit Event page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.

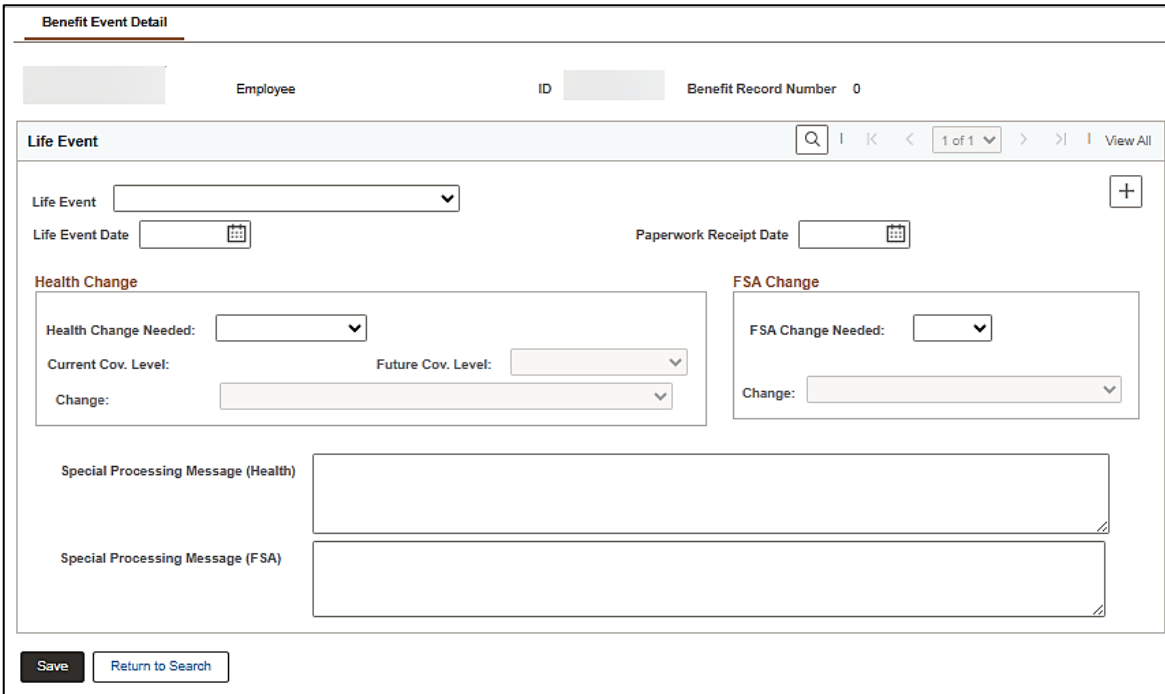
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Step	Action
2.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > Benefit Event Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 
The Benefit Event Entry Find an Existing Value Search page displays. 	
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.



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Step	Action
3.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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. 
4.	Click the Search button. 
The Benefit Event Detail page displays for the selected employee. 	
5.	Click the Life Event dropdown button and select the applicable Life Event ("Marriage" for this scenario). 
6.	Click the Life Event Date Calendar icon and select the applicable date. 

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Step	Action
	This is the date of the actual event (marriage, birth, divorce, etc.).
7.	Click the Paperwork Receipt Date Calendar icon and select the applicable date. Paperwork Receipt Date 
	This is the date that the Benefits Enrollment form was received from the employee.
8.	Click the Health Change Needed dropdown button and select “Yes”. Note: Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes”. If “Yes” is not selected, a Benefit Event will not be created. Health Change Needed:
	The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.
9.	Click the Future Cov. Level dropdown button and select the applicable coverage level. Future Cov. Level:
	The coverage levels available for selection are: • “Single, Employee” • “Employee + Spouse” • “Employee + CH (Child)” • “Family” • “Waive Coverage” Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed.
10.	Click the Change dropdown button and select “Existing health plan – add eligible dependents”. Change:
	The selections available will vary based on the type of Life Event previously selected.



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Step	Action
11.	Complete the fields within the FSA Change section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee's FSA elections will be made for this scenario). FSA Change FSA Change Needed: Change:
12.	Click the Save button. Save Return to Search

The **Benefit Event Detail** page redisplay.

Benefit Event Detail

Employee

ID

Benefit Record Number 0

Life Event
Life Event Date Paperwork Receipt Date

Health Change
Health Change Needed:
Current Cov. Level: Future Cov. Level:
Change:

FSA Change
FSA Change Needed:
Change:

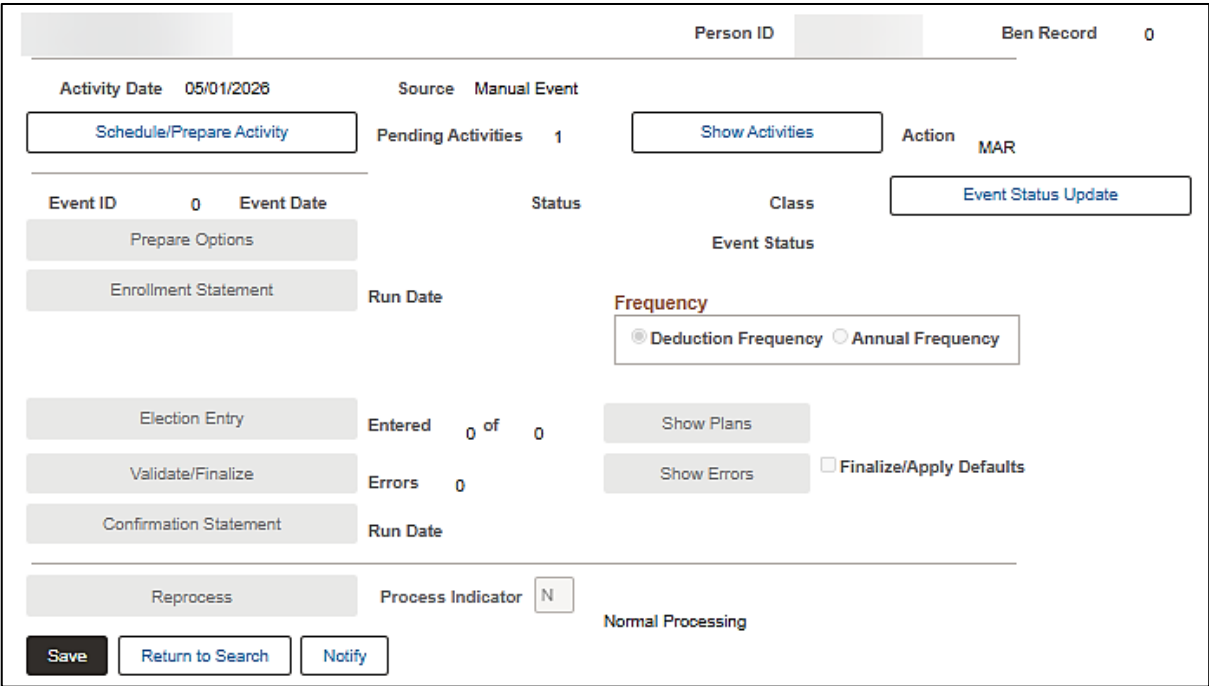
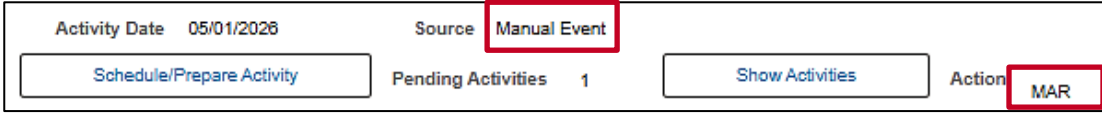
Special Processing Message (Health)
Use the MAR event to add eligible dependents to existing health plan. Documentation Needed: Spouse- photocopy of official marriage certificate. Children - birth certificate or legal adoption agreement showing employees/spouses' name.

Special Processing Message (FSA)

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Step	Action
	After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval is required based on the dates entered, or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field. The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.
13.	Navigate to the On-Demand Event Process page using the following navigation path in the Benefits WorkCenter: Links > Enrollment Administration > On-Demand Event Process
The On-Demand Event Maintenance Find an Existing Value Search page displays. On-Demand Event Maintenance Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.  Recent Searches Choose from recent searches ▼  Saved Searches Choose from saved searches ▼ Empl ID begins with ▼ Empl Record = ▼ Name begins with ▼ Last Name begins with ▼ Second Last Name begins with ▼ Alternate Character Name begins with ▼ ^ Show fewer options ☐ Case Sensitive Search Clear	
14.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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. Empl ID begins with ▼
15.	Click the Search button. Search Clear

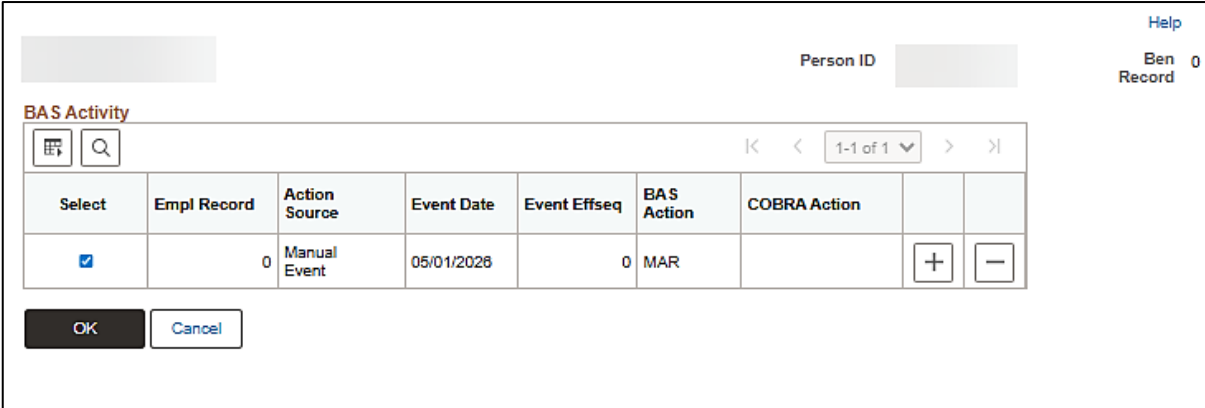
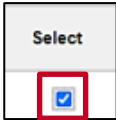
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Step	Action
	The On-Demand Event Process page displays for the selected employee. 
	If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a “0”. In this case, proceed to Step 22.
16.	Review the Activity Date field for accuracy. 
	For Life Events, this date will auto-populate based on the coverage begin date for the applicable type of Life Event (for this scenario, the Life Event is a marriage, so the Activity Date field defaults to the first day of the month following the date of marriage). Ensure that this date is accurate. The Source field will be “Manual Event”. The Action field will default based on the type of Life Event (“MAR” for Marriage for this scenario). 

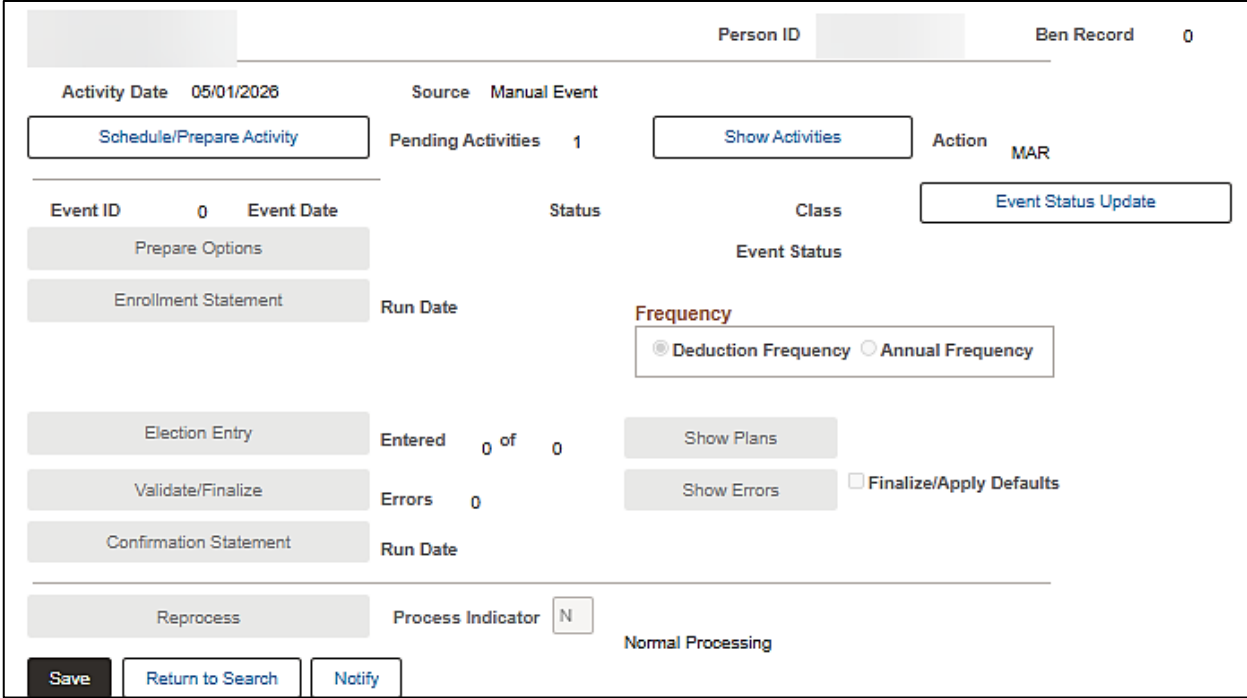
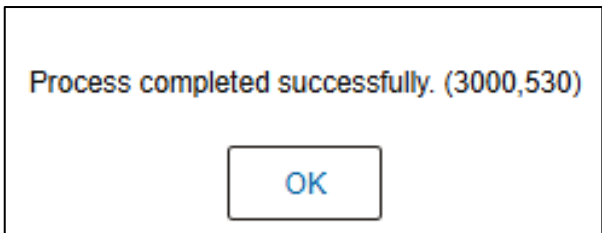


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Step	Action
17.	Click the Show Activities button. 
	The BAS Activity page displays in a pop-up window. 
18.	Ensure that the Select checkbox option for the applicable Manual Benefit Event is selected. 
19.	Click the OK button. 

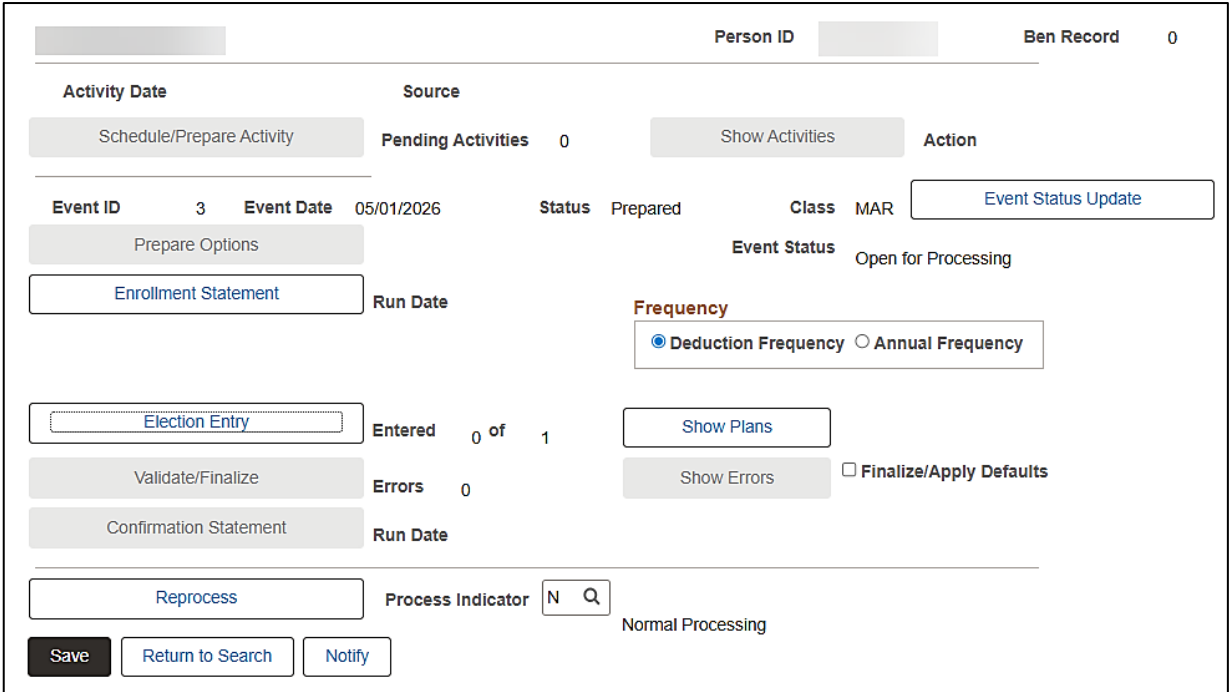
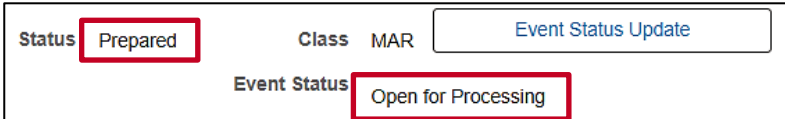
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Step	Action
	The On-Demand Event Process page redisplay. 
20.	If the Pending Activities field displays a “1” or more, click the Schedule/Prepare Activity button. Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. 
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 



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Step	Action
21.	Click the OK button to close the message. 
The On-Demand Event Process page redisplay. 	
22.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. Note: If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line. 
23.	Click the Election Entry button. 



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

24. Select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the **Option Code Look up** icon (magnifying glass) within the **Plan Type 10: Medical** section and select the applicable Option Code based on the coverage being elected.

Select the same Benefit Plan that the employee is currently enrolled in but with the new Coverage Code (based on the employee's Benefits Enrollment form) by clicking the corresponding link in the **Option Code** column (Benefit Plan "ACC4" with Coverage Code "4" will be selected in this example as this is a marriage and the employee is adding the spouse and a stepchild).

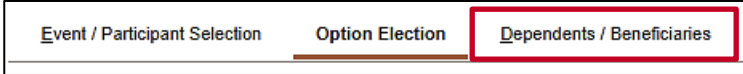
The Coverage Codes are as follows:

- 1 – Single
- 2 – Employee + Spouse
- 3 – Employee + Child (except for Tricare)
- 4 – Employee + 2 or More Dependents (Family – except for Tricare)
- 8 – Employee + Child(ren) (Tricare only)
- 9 – Family (EE + SP + Child/ren for Tricare only)

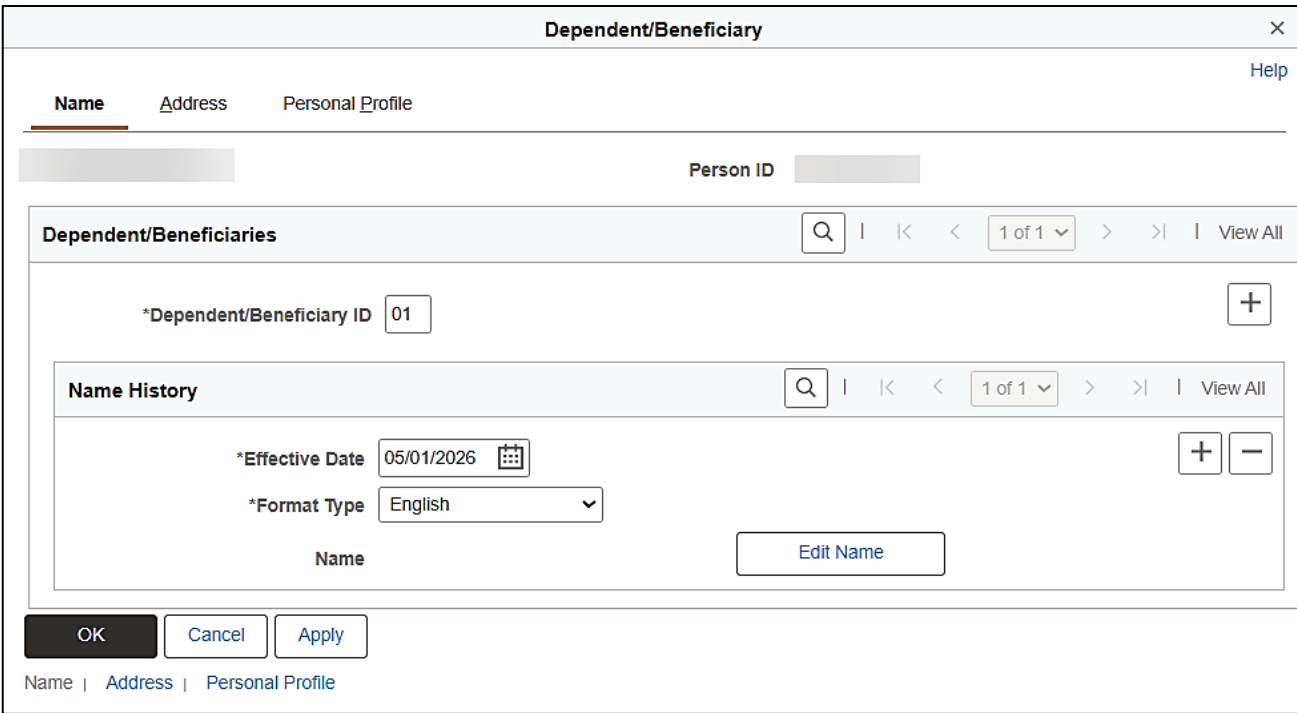


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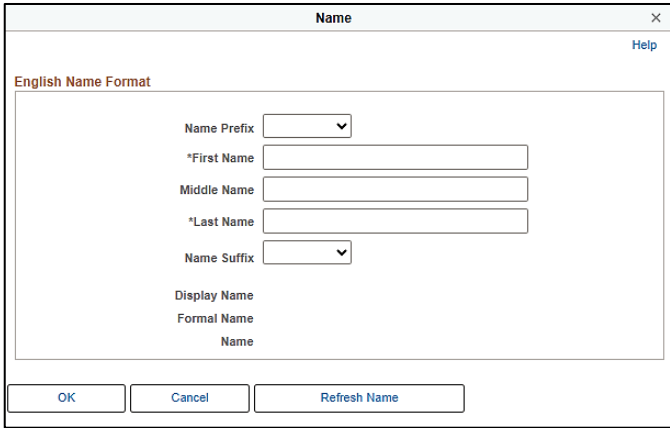
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Step	Action
25.	Click the Dependents / Beneficiaries tab to add the new dependent(s).  The screenshot shows the 'BenAdmin Data Entry' window with three tabs: 'Event / Participant Selection', 'Option Election', and 'Dependents / Beneficiaries'. The 'Dependents / Beneficiaries' tab is highlighted with a red box. Below the tabs, there are fields for 'Schedule ID' (EM00), 'Employee ID' (empty), 'Event ID' (3), 'Event Data' (05/01/2026), 'Benefit Record' (0), and 'Excess Credit Rollover To' (Forfeit Excess Credits). A section titled 'Dependent/Beneficiaries Currently on Record' contains a table with columns: Name, Relationship to Employee, Dependent Beneficiary Type, and Date of Birth. Below this table is a link 'Change/Add Dependent Data'. Another section titled 'Elections Requiring Supplemental Information' contains a table with columns: Election ID (10), Election Description (Medical), and a link 'Enroll Dependents'. At the bottom are buttons 'OK', 'Cancel', 'Apply', and 'Refresh'.
26.	Click the Change/Add Dependent Data link.  The screenshot shows a red box around the 'Change/Add Dependent Data' link in the 'Elections Requiring Supplemental Information' section.

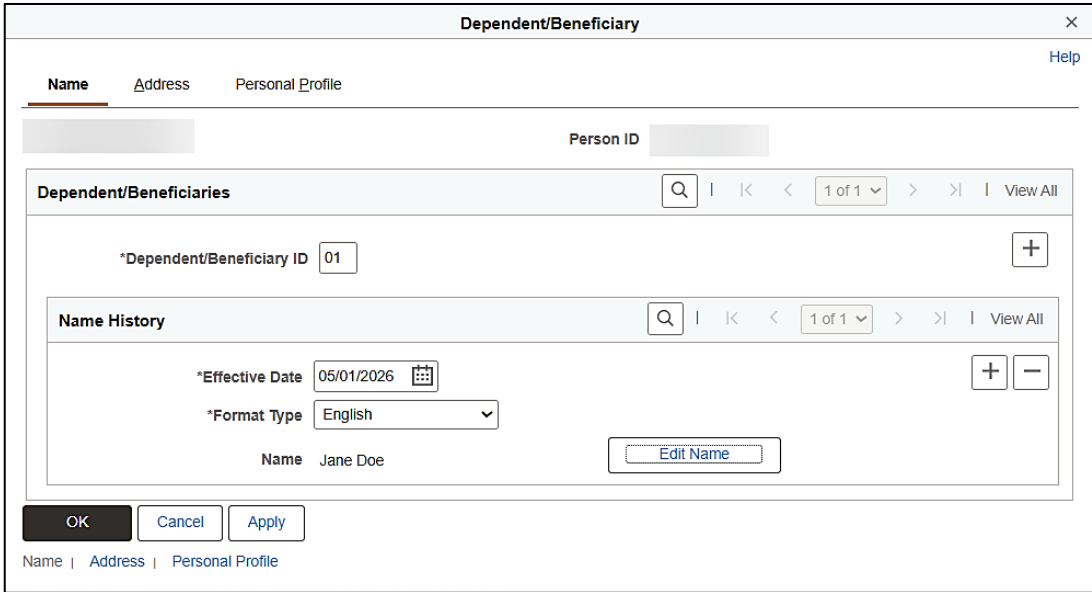
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Step	Action
	The Dependent/Beneficiary page displays in a pop-up window with the Name tab displayed by default. 
	For Life Events, the Effective Date field defaults to the date that the coverage will begin. For this scenario, the Life Event is a marriage, so the Effective Date field defaults to the first day of the month following the date of marriage. Do not change this date as it must match the Event Date or the system will not recognize this dependent as eligible for coverage. The Dependent/Beneficiary ID field will default to the next available Dependent/Beneficiary ID number ("01" for this scenario) and increment by 1 for each additional dependent subsequently added.
27.	Click the Edit Name button. 

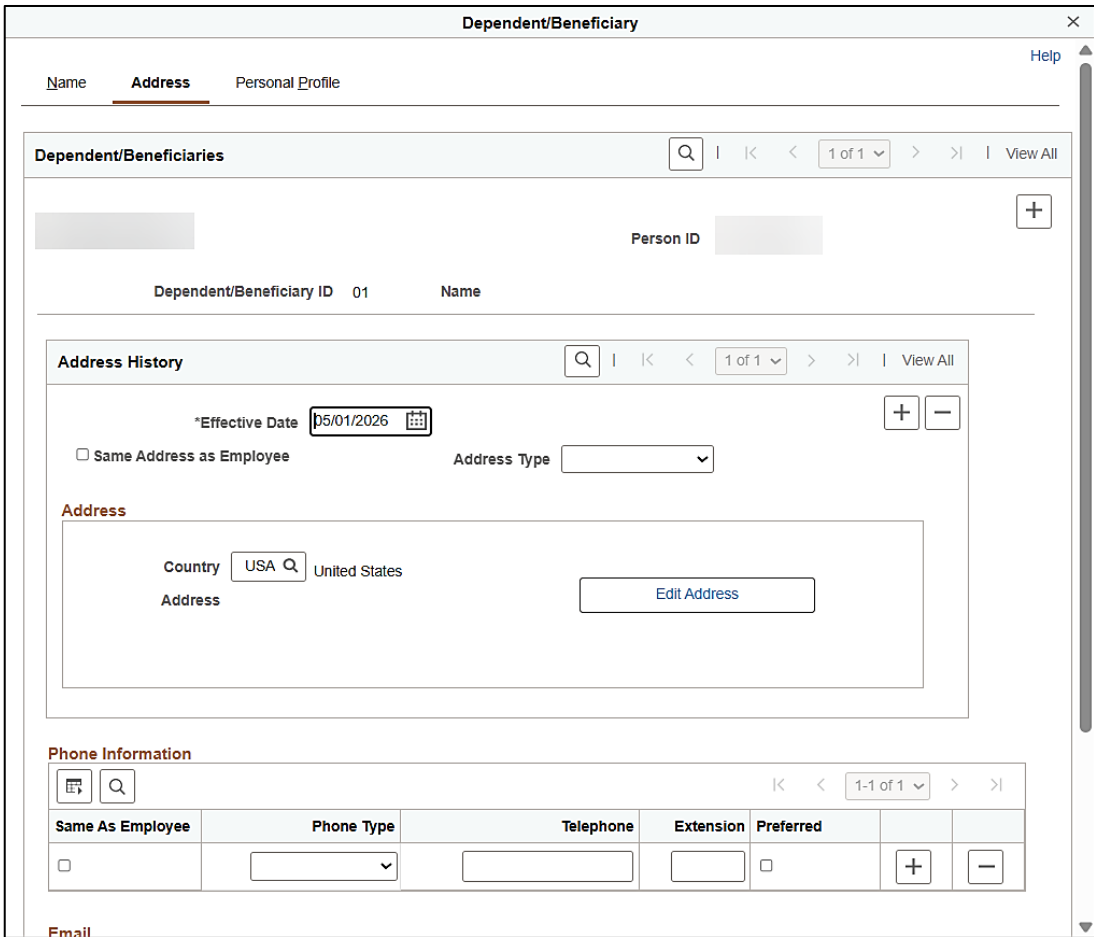
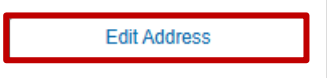
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Step	Action
	The Name page displays in a pop-up window. 
28.	At a minimum, enter the dependent's first and last name in the corresponding fields. The Name Prefix, Middle Name, and Name Suffix fields are optional but should be entered as applicable. Note: Do not use accent marks or special characters in the name fields. These are not recognized and can cause errors when uploading to the Vendor. 
29.	Click the OK button. 

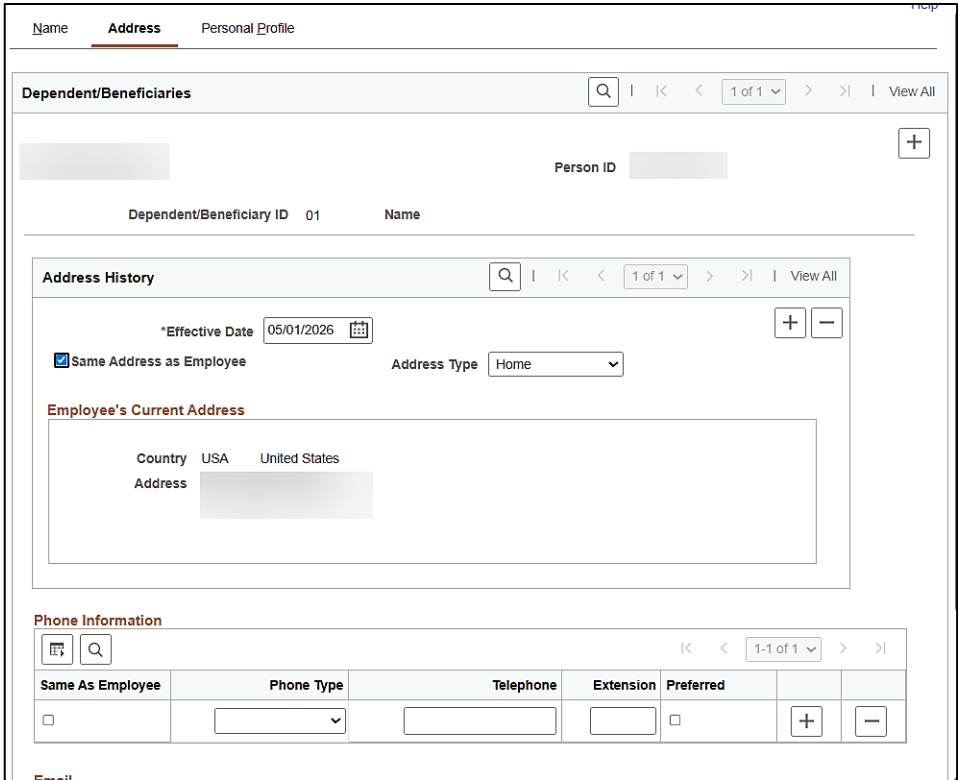
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Step	Action
	The Name page redisplay. 
	The Name field in the Name History section auto-populates with the name information previously entered.
30.	Click the Address tab. 

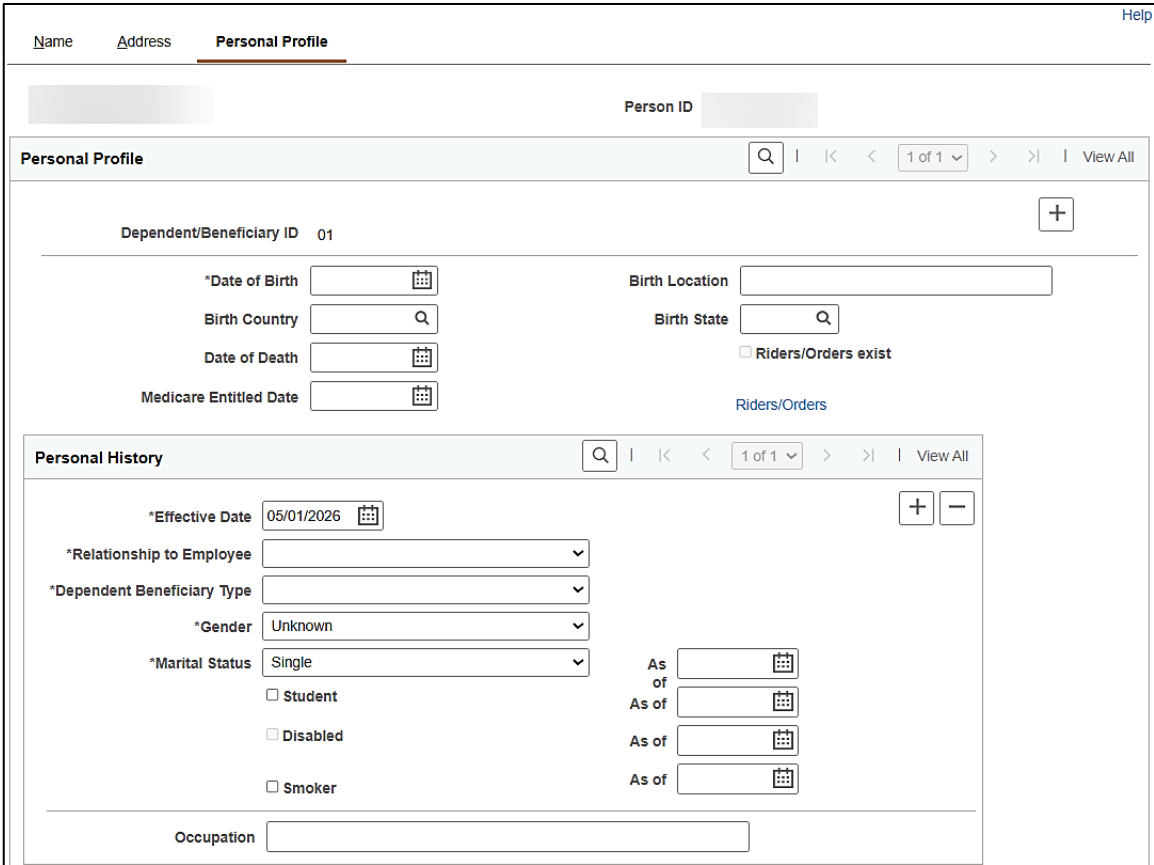
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Step	Action
	The Address page displays. 
31.	Select the Same Address as Employee checkbox option if applicable. For this scenario, the box is checked. 
	The address information can be completed as applicable for the dependent by either selecting the applicable Address Type using the dropdown button provided 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). 

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Step	Action
	The Address page refreshes. 
	The address information auto-populates in the Employee's Current Address section. Phone information can be added, but it is not required.
32.	Click the Personal Profile tab. 

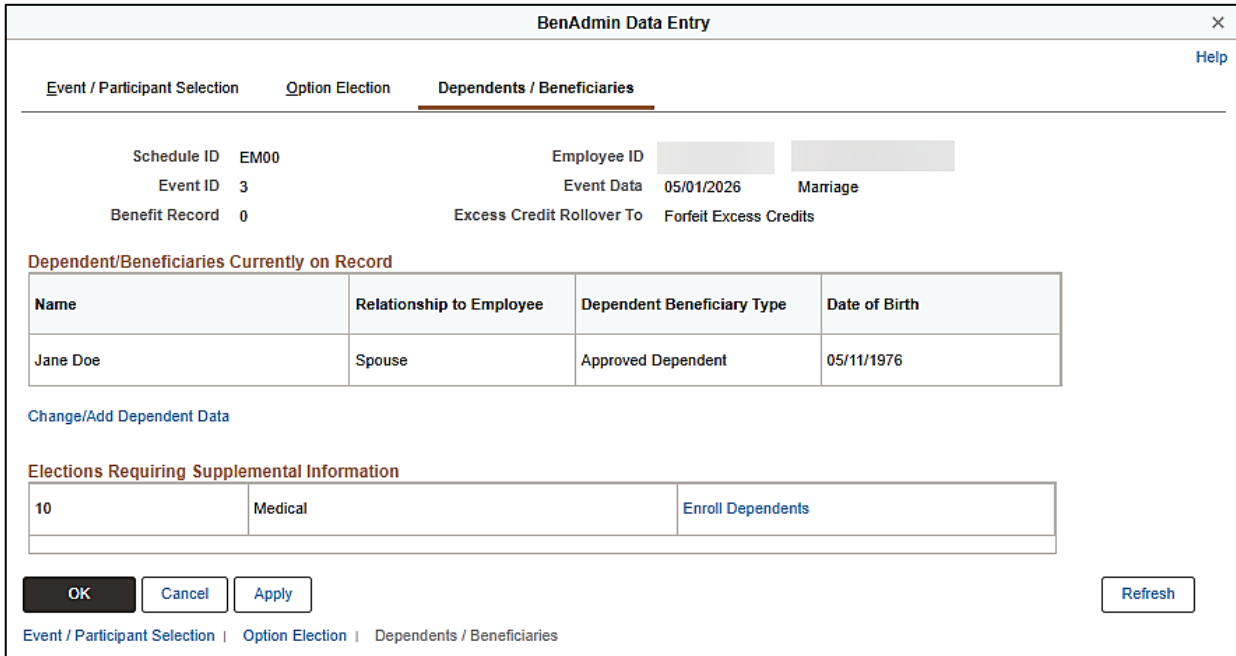
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Step	Action
	The Personal Profile page displays. 
	The following steps provide instructions for completing the required dependent information. If any of the other optional information is provided by the employee, it can be entered in the corresponding fields. The Student and Smoker checkbox options are not required in Cardinal, and this information is not transmitted to the Plan Provider (Vendor).
33.	Click the Date of Birth Calendar icon and select the dependent's date of birth. 
34.	Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee ("Spouse" for this scenario). 

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Step	Action														
35.	The Dependent Beneficiary Type field defaults to “Unapproved Dependent” upon the selection of the relationship. Click the Dependent Beneficiary Type dropdown button and select the applicable type (“Approved Dependent” for this scenario). *Dependent Beneficiary Type														
i	“Approved Dependent” is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.														
36.	Click the Gender dropdown button and select the dependent’s gender: “Unknown”, “Male”, or “Female” (“Female” for this scenario). Note: For benefits purposes, “Male” or “Female” must be selected. If unsure at the time of entry, select “Unknown” and update once Gender is confirmed. *Gender Unknown														
37.	The Marital Status field defaults to “Single”. Update as needed for the dependent (“Married” for this scenario). Note: If any status other than “Single” is selected, select the applicable date using the Marital Status As of Calendar icon (“4/16/2026” for this scenario). *Marital Status Married As of 04/16/2026														
38.	Click the vertical scrollbar to scroll down on the page to the National ID section and enter the dependent’s Social Security Number (SSN) in the National ID field. ▼ National ID << 1-1 of 1 >> View All <table><thead><tr><th>*Country</th><th>*National ID Type</th><th>Description</th><th>National ID</th><th>Primary ID</th><th></th><th></th></tr></thead><tbody><tr><td>USA</td><td>PR</td><td>Social Security Number</td><td></td><td>☒</td><td> + </td><td> − </td></tr></tbody></table> OK Cancel Apply Name Address Personal Profile	*Country	*National ID Type	Description	National ID	Primary ID			USA	PR	Social Security Number		☒	+	−
*Country	*National ID Type	Description	National ID	Primary ID											
USA	PR	Social Security Number		☒	+	−									
i	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 by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.														

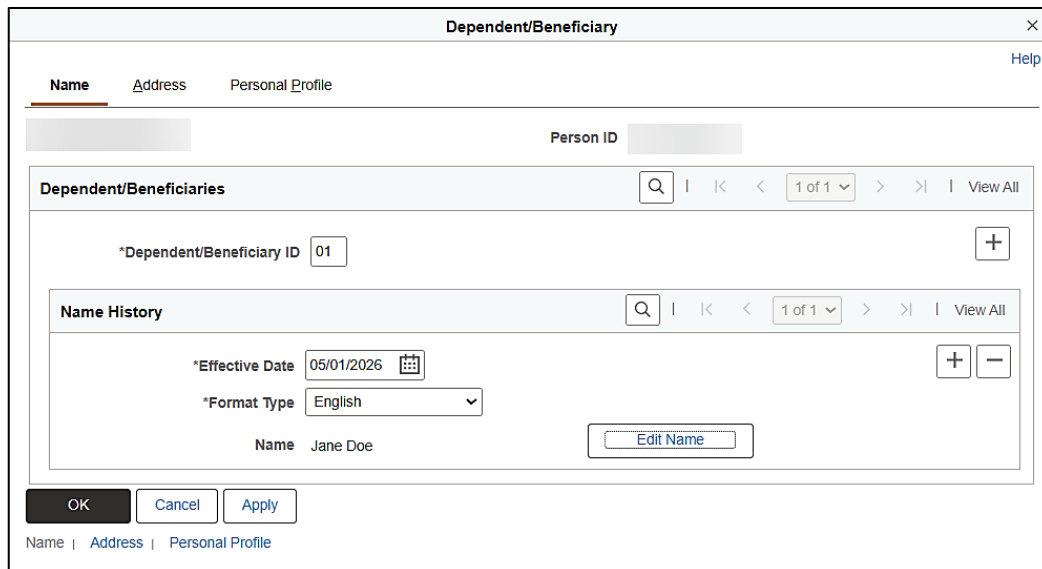
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Step	Action
39.	Click the OK button. 
The Dependents / Beneficiaries page redisplay with the added dependent in the Dependent/Beneficiaries Currently on Record section. 	
	If additional dependents need to be added (e.g., birth of twins, adding stepchildren as a result of marriage, etc.), proceed to the next step. If no additional dependents need to be added, proceed to Step 44.
40.	For this scenario, a stepchild will be added. Click the Change/Add Dependent Data link. 

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Step	Action
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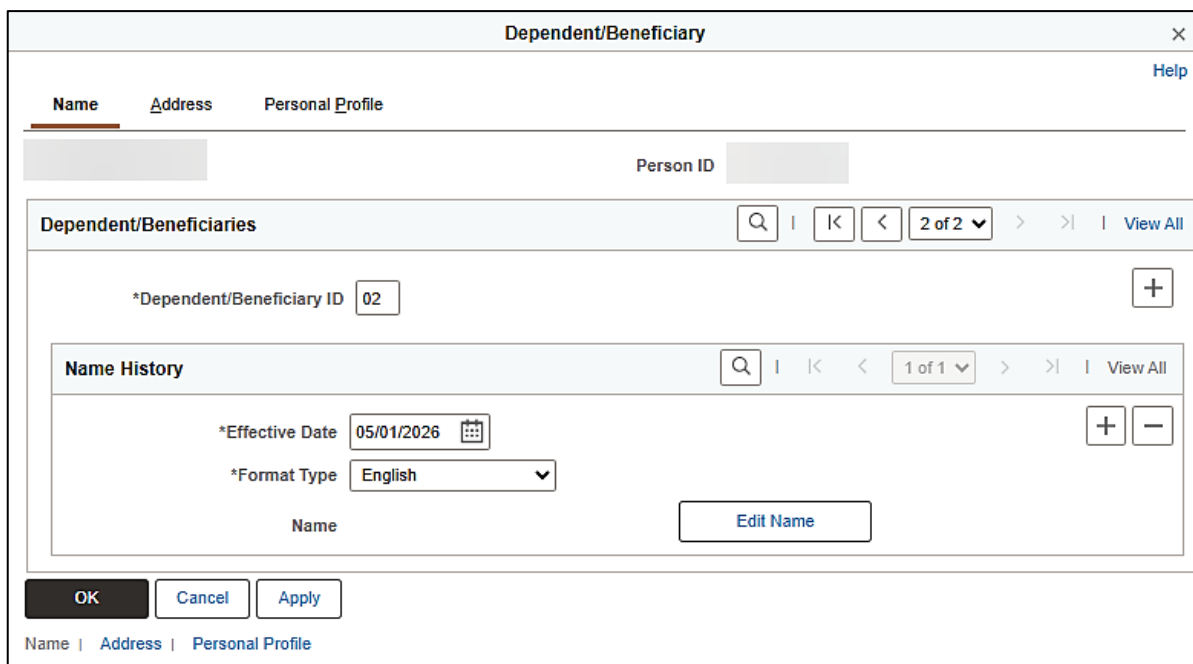
The **Dependent/Beneficiary Name** page redisplay in a pop-up window.



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



The page refreshes with a new row.



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Step

Action

i

The **Dependent/Beneficiary ID** field increments by “1” (“02” for this scenario as this is the second dependent being added).

Dependent/Beneficiary IDs do not need to be sequential and should never be manually updated for existing records.

Dependent/Beneficiaries

|

K

<

2 of 2

>

>|

|

View All

*Dependent/Beneficiary ID

02

+

42.

Repeat **Steps 26 - 39** to complete the data entry for the next dependent and then repeat as needed until all dependents have been added.

43.

Click the **OK** button.

OK

Cancel

Apply

The **Dependents / Beneficiaries** page redisplay,

BenAdmin Data Entry

×

Help

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Event ID

3

Event Data

05/01/2026

Marriage

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
Jane Doe	Spouse	Approved Dependent	05/11/1976
Jonathan Smith	Stepchild	Approved Dependent	05/01/2000

Change/Add Dependent Data

Elections Requiring Supplemental Information

10

Medical

Enroll Dependents

OK

Cancel

Apply

Refresh

Event / Participant Selection

|

Option Election

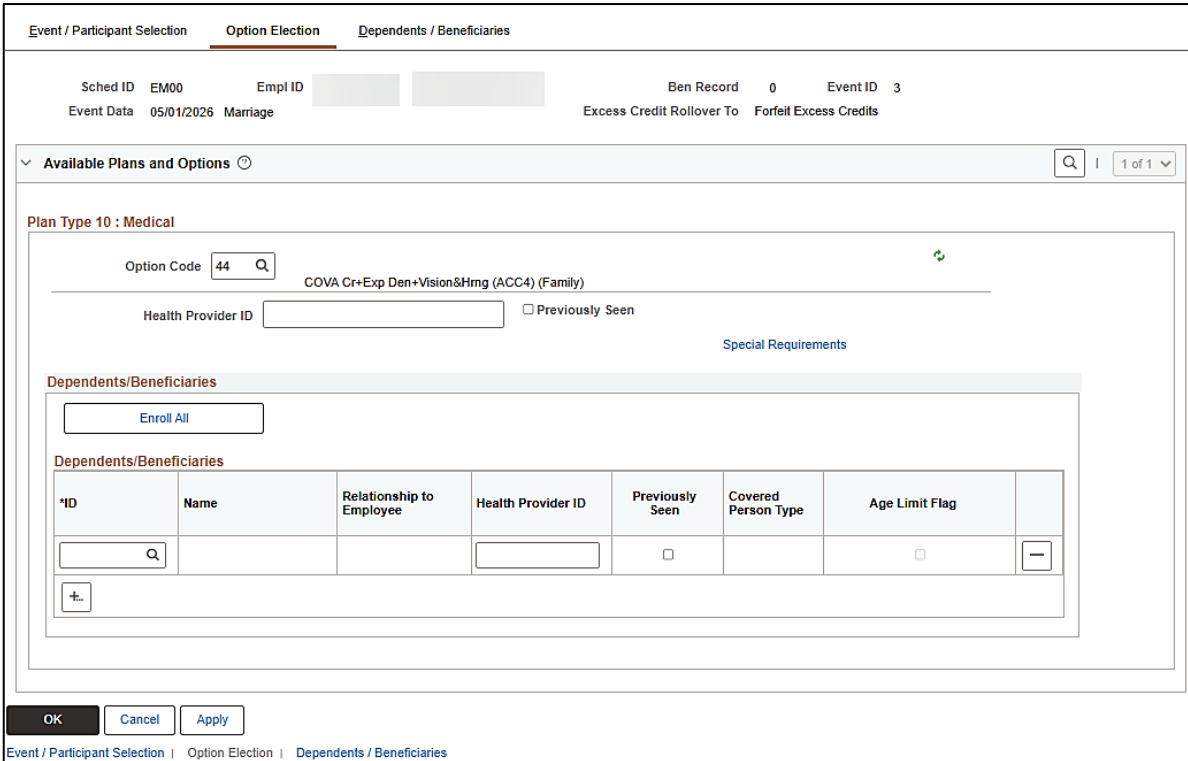
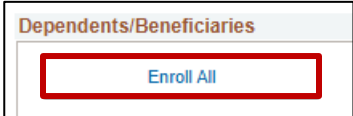
|

Dependents / Beneficiaries

i

All added dependents will display in the **Dependent/Beneficiaries Currently on Record** section (spouse and stepchild for this scenario).

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Step	Action
44.	Click the Option Election tab. 
	The Option Election page displays. 
45.	Click the Enroll All button to enroll the dependent(s) in the previously selected Medical Plan (applicable for this scenario). 
	Users can also enroll the dependent(s) in the previously selected Medical Plan by 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 (+...).



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Step

Action

The **Option Election** page refreshes with the enrolled dependent(s) displayed.

Event / Participant SelectionOption ElectionDependents / Beneficiaries

Sched IDEM00Empl IDBen Record0Event ID3

Event Data05/01/2026MarriageExcess Credit Rollover ToForfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code44

COVA Cr+Exp Den+Vision&Hrng (ACC4) (Family)

Health Provider ID

Previously Seen

Special Requirements

Dependents/Beneficiaries

Enroll All

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Jane Doe	Spouse		☐	Spouse	☐	—
02	Jonathan Smith	Stepchild		☐	Child	☒	—
+ -							

OKCancelApply

Event / Participant Selection | Option Election | Dependents / Beneficiaries

46.

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

Dependents/Beneficiaries

*ID	Name	Relationship to Employee	Health Provider ID	Previously Seen	Covered Person Type	Age Limit Flag	
01	Jane Doe	Spouse		☐	Spouse	☐	—
02	Jonathan Smith	Stepchild		☐	Child	☒	—

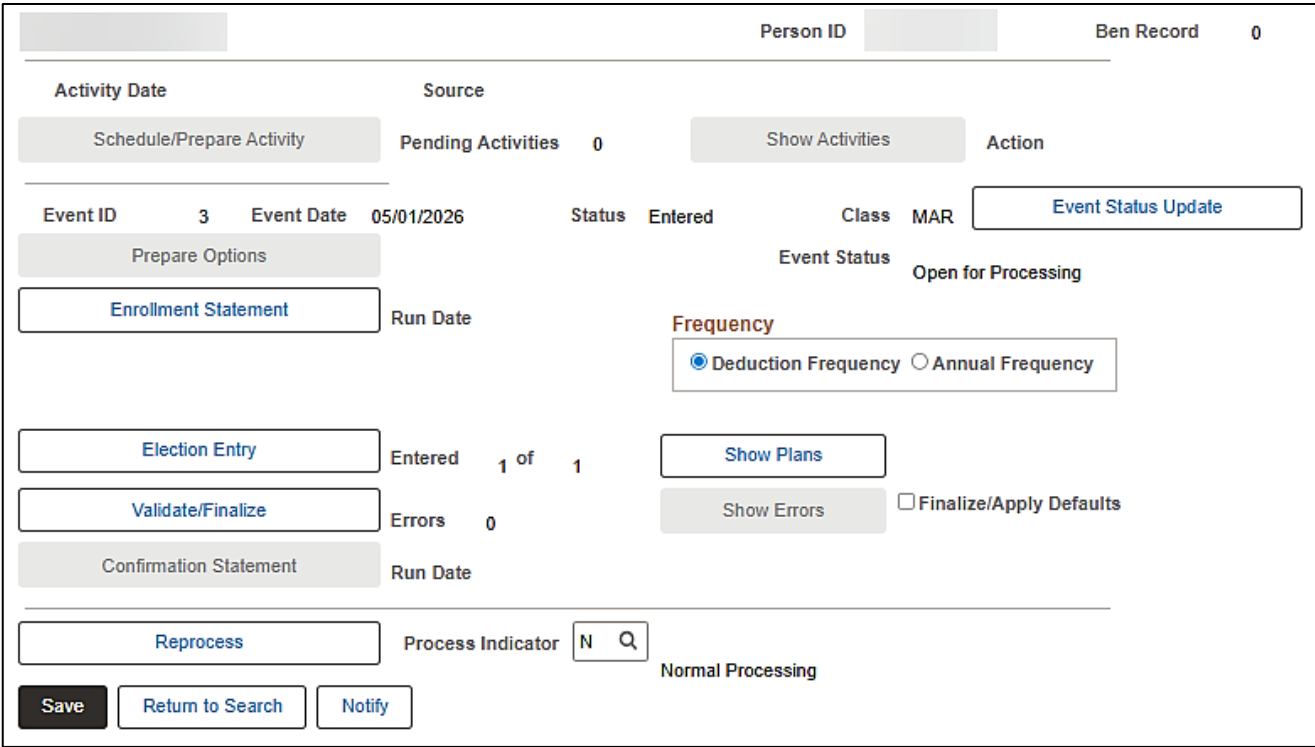
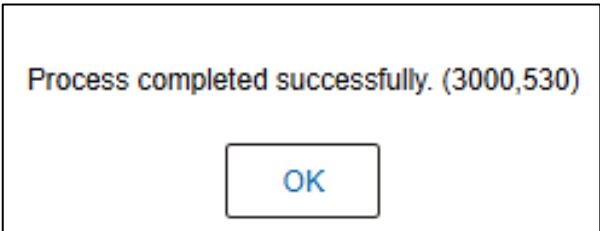
47.

Click the **OK** button.

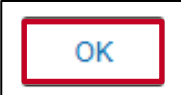
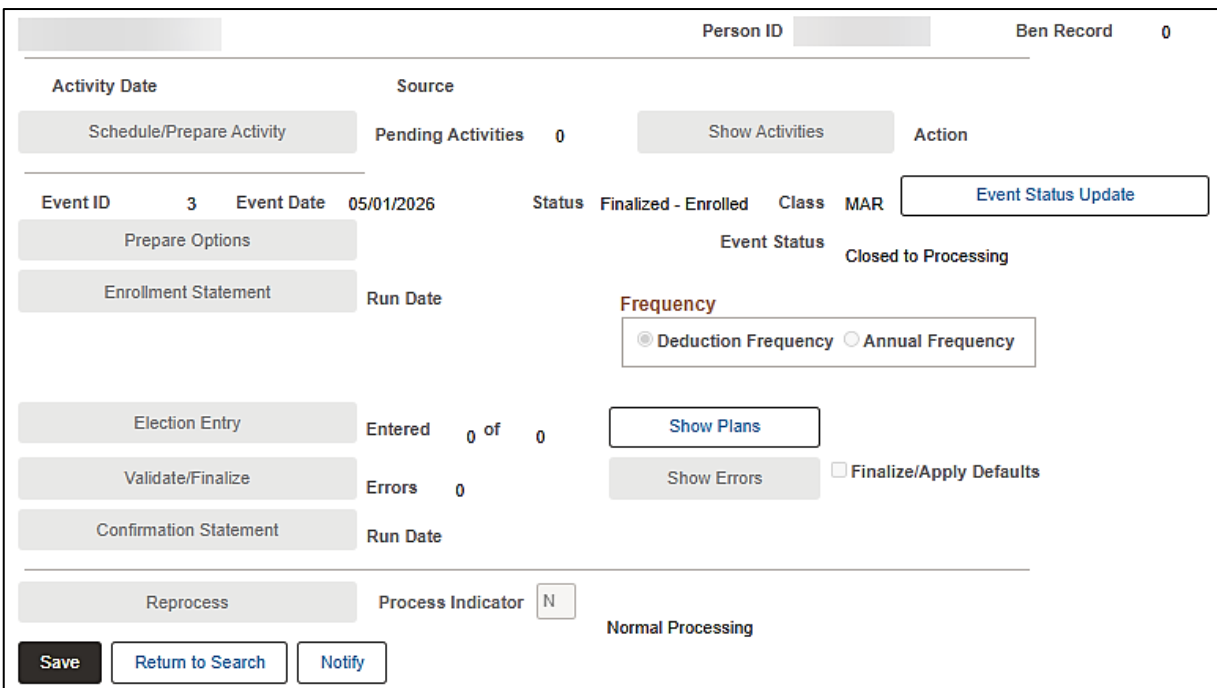
OKCancelApply

If FSA changes were elected on the **Benefit Event** page, they will be entered on the FSA event that was created after the MAR event is finalized.

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Process page redisplay. 
	The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.
48.	Click the Validate/Finalize button. 
	This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.
A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 	

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
49.	Click the OK button to close the message. 
The On-Demand Event Process page redisplay. 	
	The Status field will now display as “Finalized-Enrolled”. The Event Status field will display as “Closed to Processing”.
	This process is now complete. Refer to the BN361 Reviewing Employee Benefits Information Job Aid (specifically, the Reviewing the Benefits Summary Page section), located on the Cardinal website in Job Aids under Learning for instructions on how to validate accuracy. For more information pertaining to viewing and printing a Confirmation Statement, refer to the Job Aid titled BN361 How to Review Benefits Statements, located on the Cardinal website in Job Aids under Learning.

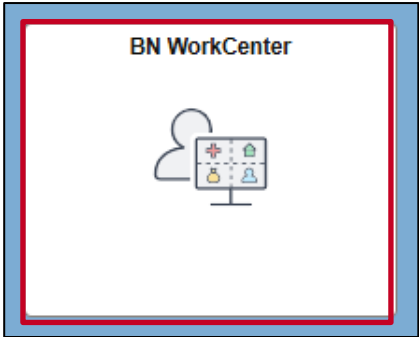
BN361 Creating and Completing a Life Event on Behalf of an Employee

Removing Dependent(s)

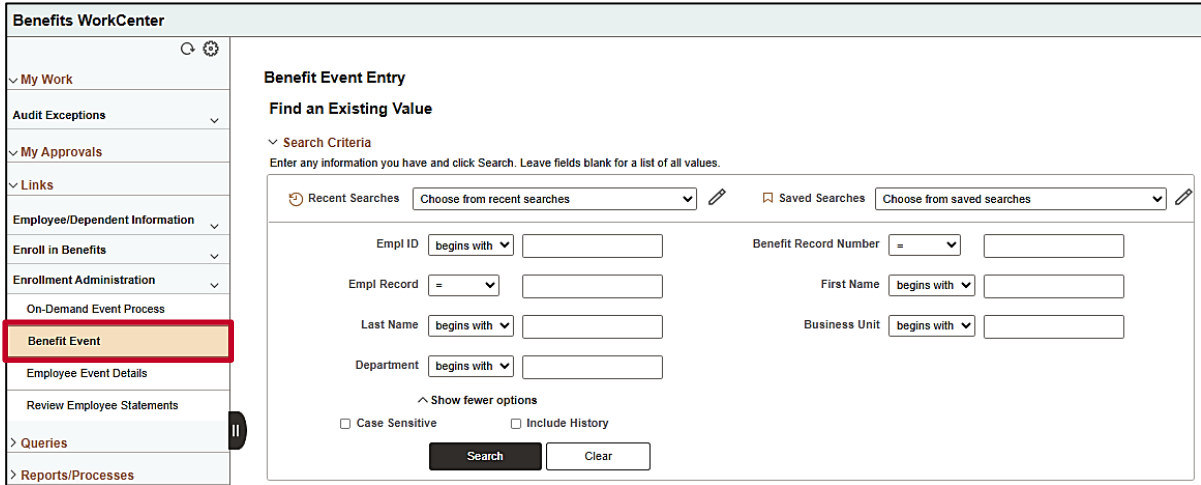
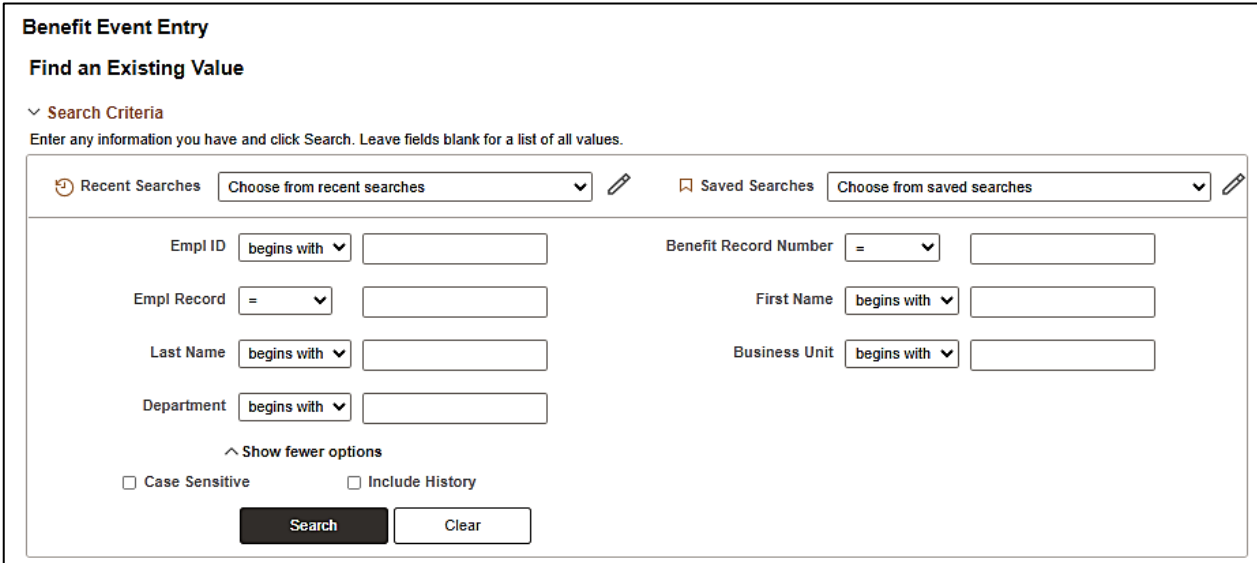
This section of the Job Aid should be referenced when creating and processing a Life Event on behalf of the employee wherein one or more dependents is being removed from the employee's coverage (divorce, death, etc.). The steps included in this section of the Job Aid are based on the example below.

Scenario: An employee got divorced on 4/21/2026. The employee submitted the appropriate supporting documentation and a benefits enrollment request form on 4/21/2026 to remove their ex-spouse from enrollment in their Health Plan. The children from the marriage are going to remain enrolled in the employee's Health Plan. The employee did not initiate this Qualifying Mid-Year Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process this manual Benefit Event (Life Event).

Note: Generally speaking, the steps in this Job Aid can be used to create and process any manual Life Event on behalf of an employee wherein dependents are being removed from the employee's coverage. Be sure to use the actual dates and information provided by the employee when completing this process in Production.

Step	Action
1.	Navigate to the Benefit Event page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning .

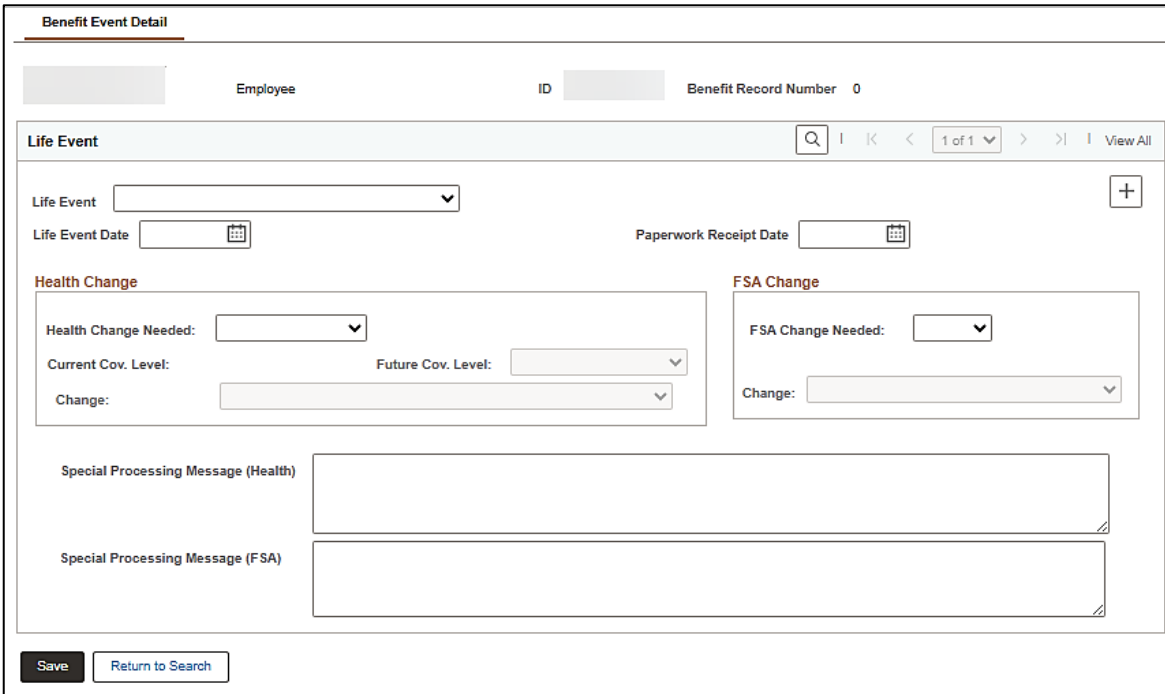
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
2.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > Benefit Event Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles.  The Benefit Event Entry Find an Existing Value Search page displays. 
	For more information pertaining to the Cardinal HCM Search pages, refer to the Job Aid titled Overview of the Cardinal HCM Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.



Benefits Job Aid

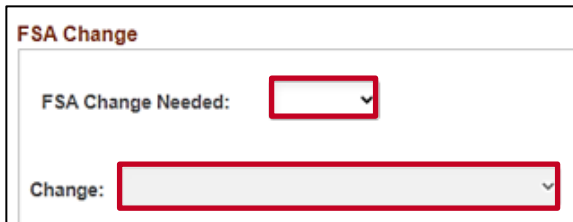
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
3.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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. 
4.	Click the Search button. 
The Benefit Event Detail page displays for the selected employee. 	
5.	Click the Life Event dropdown button and select the applicable Life Event ("Divorce" for this scenario). 

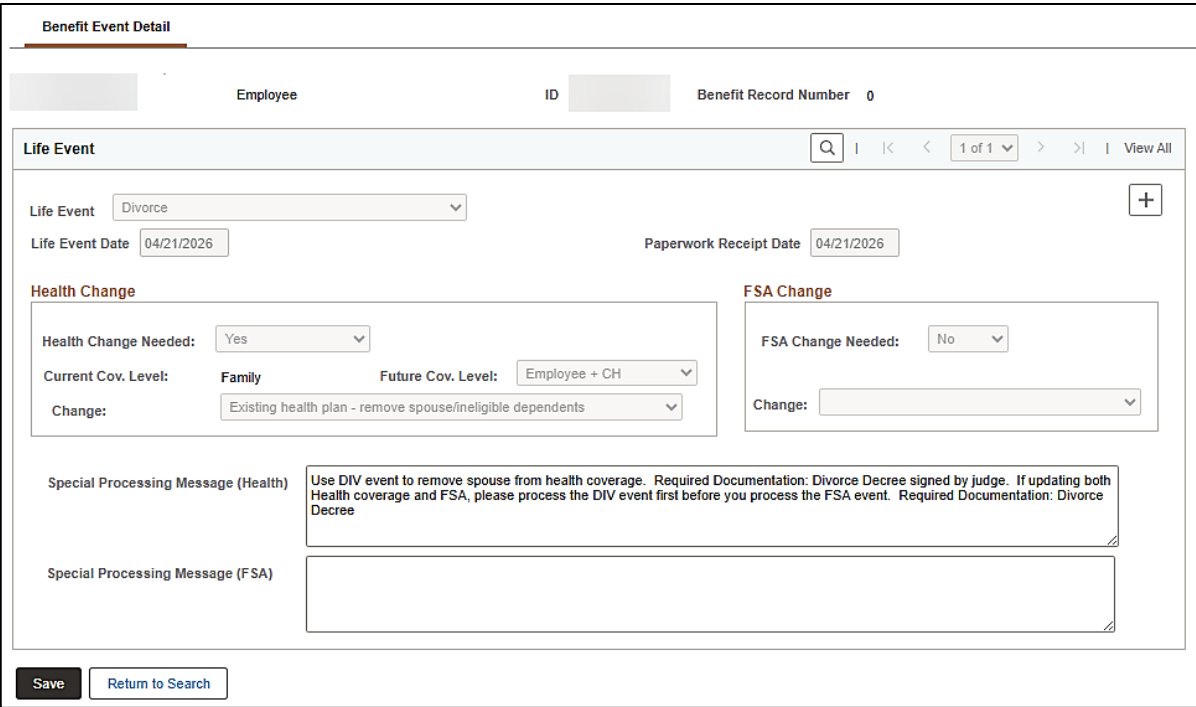
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
6.	Click the Life Event Date Calendar icon and select the applicable date ("4/21/2026" for this scenario). Life Event Date 4/21/2026
	This is the date of the actual event (marriage, birth, divorce, etc.).
7.	Click the Paperwork Receipt Date Calendar icon and select the applicable date ("4/21/2026" for this scenario). Paperwork Receipt Date 4/21/2026
	This is the date that the Benefits Enrollment form was received from the employee.
8.	Click the Health Change Needed dropdown button and select the applicable answer based on the following: • If the Life Event requires a change in the Health Plan Coverage Code for the employee, select "Yes" (e.g., this is a divorce event, and the employee will still cover one dependent which is a change from "Family" coverage) • Even if the Life Event does not require a change in the Health Plan Coverage Code, but it will require changes to the covered dependent(s), select "Yes". If "Yes" is not selected, a Benefit Event will not be created Health Change Needed: Yes
	The Current Cov. Level field auto-populates with the employee's current Health Plan enrollment coverage level.
9.	Click the Future Cov. Level dropdown button and select the applicable coverage level ("Employee + CH" for this scenario). Future Cov. Level: Employee + CH

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The coverage levels available for selection are: • “Single, Employee” • “Employee + Spouse” • “Employee + CH (Child)” • “Family” • “Waive Coverage” Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed.
10.	Click the Change dropdown button and select the applicable Change (“Existing health plan – remove spouse/ineligible dependents” for this scenario). 
	The selections available will vary based on the type of Life Event previously selected.
11.	Complete the fields within the FSA Change section if the employee is making any changes to their Flex Spending Account(s) (Flex Spending Medical or Flex Spending Dependent Care) in conjunction with the Life Event (no changes to the employee’s FSA elections will be made for this scenario). 
12.	Click the Save button. 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Benefit Event Detail page redispays. 
	After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval is required based on the dates entered, or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field. The manual Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.
13.	Navigate to the On-Demand Event Process page using the following navigation path in the Benefits WorkCenter: Links > Enrollment Administration > On-Demand Event Process

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Maintenance Find an Existing Value Search page displays. On-Demand Event Maintenance Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Empl Record = Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive Search Clear
14.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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. Empl ID begins with
15.	Click the Search button. Search Clear



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Process page displays for the applicable employee. Person ID Ben Record 0 Activity Date 05/01/2026 Source Manual Event Schedule/Prepare Activity Pending Activities 1 Show Activities Action DIV Event ID 0 Event Date Status Class Event Status Event Status Update Prepare Options 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



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

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

Person ID [] Ben Record 0

BAS Activity

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☒	0	Manual Event	05/01/2026	0	DIV	DIV	+	-

OK Cancel

18. Review to validate that the **Select** checkbox option for the Manual Benefit Event is selected and then click the **OK** button.

Select	Empl Record
☒	0

OK Cancel

The **On-Demand Event Process** page redispays.

Person ID [] Ben Record 0

Activity Date 05/01/2026 Source Manual Event

Schedule/Prepare Activity Pending Activities 1 Show Activities Action DIV

Event ID 0 Event Date Status Class Event Status

Prepare Options

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

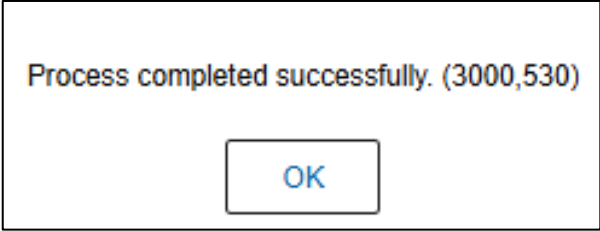
Confirmation Statement Run Date

Reprocess Process Indicator N

Normal Processing

Save Return to Search Notify

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
19.	If the Pending Activities field displays a “1” or more, click the Schedule/Prepare Activity button. Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. 
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 
20.	Click the OK button to close the message. 



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Process page redisplay. Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 6 Event Date 05/01/2026 Status Prepared Class DIV 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
21.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. Note: If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line. Status Prepared Class DIV Event Event Status Open for Processing
22.	Click the Election Entry button. Election Entry



BN361 Creating and Completing a Life Event on Behalf of an Employee

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

BenAdmin Data Entry

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

Sched ID EM00 Empl ID Ben Record 0 Event ID 6
Event Data 05/01/2026 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 36 COVA Care + Expanded Dental (ACC2) (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
01		Spouse		☐	Spouse	☐
02		Child		☐	Child	☒

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

23. Select the applicable Medical Plan based on the employee's Benefits Enrollment form as needed by clicking the **Option Code Look up** icon (magnifying glass) within the **Plan Type 10: Medical** section and then select the applicable Medical Plan/Coverage Code (for this scenario, the employee has one child dependent that is not being removed and therefore, the Medical Plan coverage code will be changed to "Employee + Child").

The Coverage Codes are as follows:

- 1 – Single
- 2 – Employee + Spouse
- 3 – Employee + Child (except for Tricare)
- 4 – Employee + 2 or More Dependents (Family – except for Tricare)
- 8 – Employee + Child(ren) (Tricare only)
- 9 – Family (EE + SP + Child/ren for Tricare only)

Plan Type 10 : Medical

Option Code 35 COVA Care + Expanded Dental (ACC2) (Self + Child)



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
24.	Click the Dependents / Beneficiaries tab to update the applicable dependent(s) being removed from coverage. Event / Participant Selection Option Election Dependents / Beneficiaries

The **Dependent / Beneficiaries** page displays.

BenAdmin Data Entry

×

Help

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID EM00

Employee ID

Event ID 6

Event Data 05/01/2026

Divorce

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
	Spouse	Approved Dependent	
	Child	Approved Dependent	

Change/Add Dependent Data

Elections Requiring Supplemental Information

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

OK

Cancel

Apply

Refresh

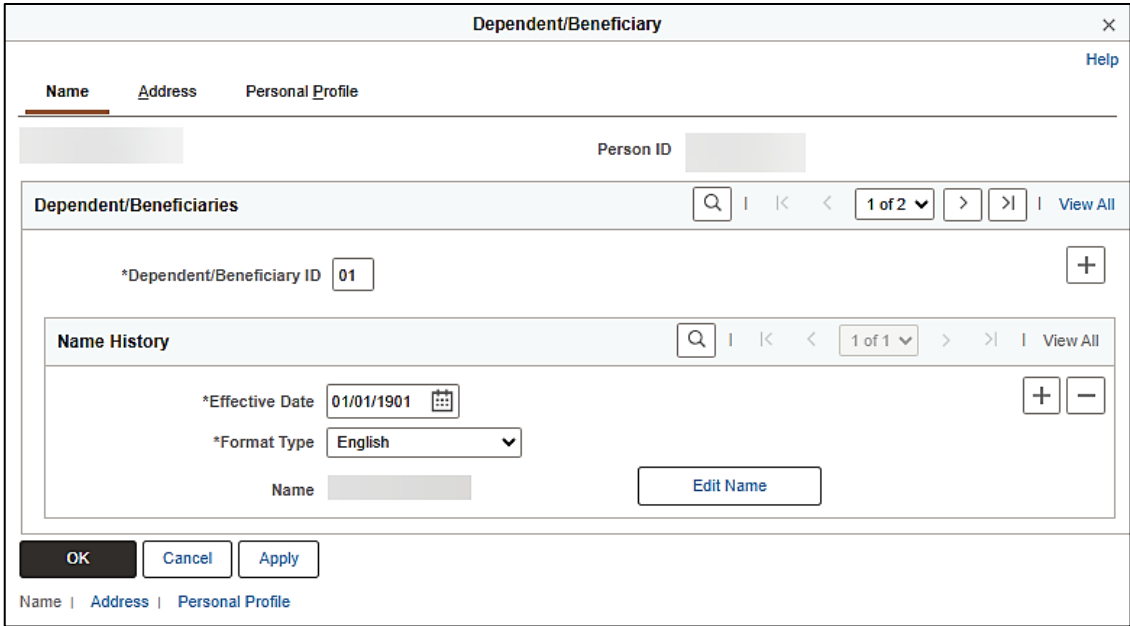
Event / Participant Selection | Option Election | Dependents / Beneficiaries

25.	Click the Change/Add Dependent Data link. Change/Add Dependent Data
-----	---

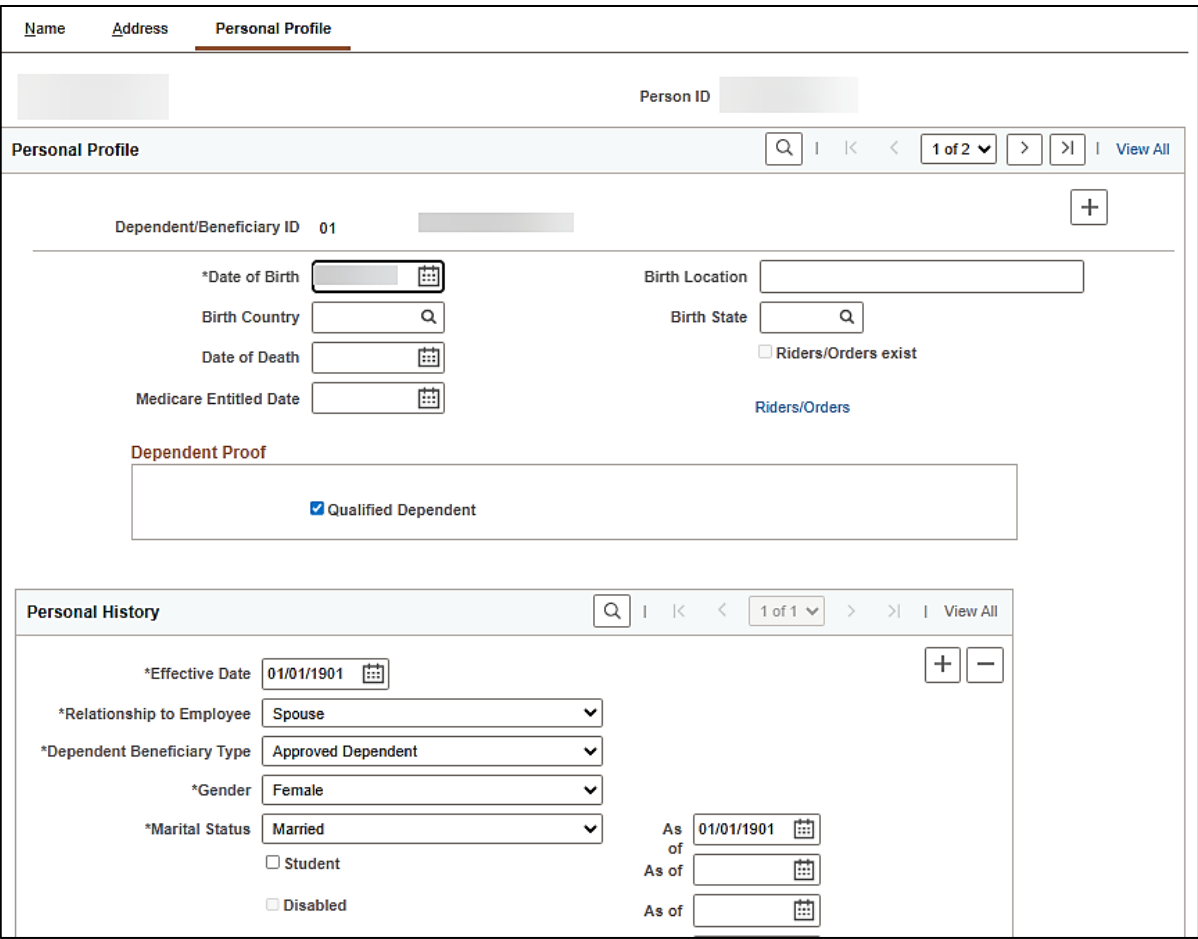


Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Dependent/Beneficiary page displays with the Name tab displayed by default. 
26.	Click the Personal Profile tab. 

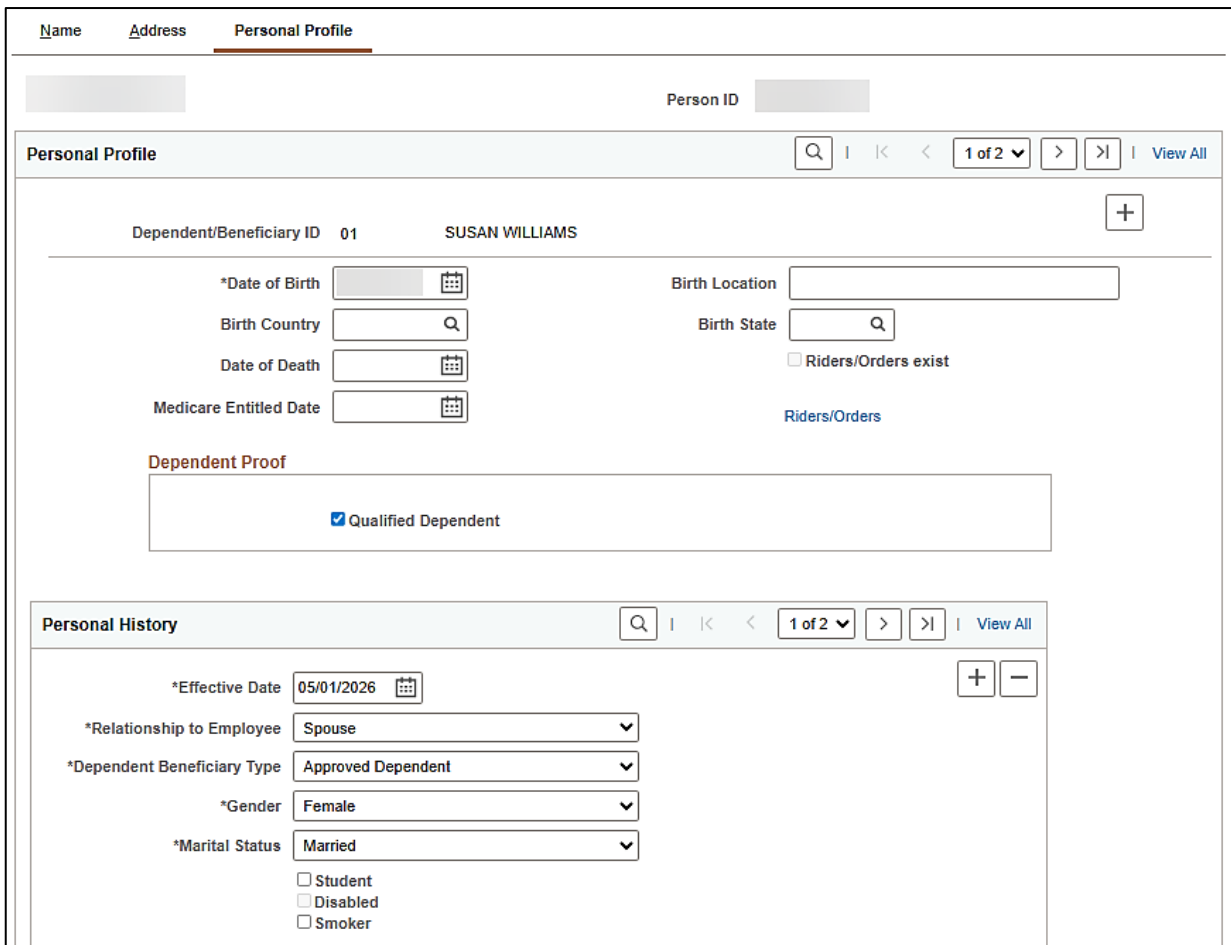
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Personal Profile page displays. 
27.	Use the arrow buttons or View All link to locate the dependent(s) to be removed (the spouse for this scenario). Note: The Personal History section displays the dependent information. 
	When removing dependents from coverage due to a Life Event, do not remove the dependent from Cardinal entirely as this will remove important audit history information from the system. The Delete icon (-) would delete the dependent from Cardinal. Do not use this icon. Complete the following steps to correctly remove the dependent that is no longer eligible from coverage. 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
28.	Click the Add a Row icon (+) within the Personal History section. 

The **Personal Profile** page redisplay with a new effective dated row.



The screenshot shows the 'Personal Profile' page. At the top, there are tabs for 'Name', 'Address', and 'Personal Profile'. Below the tabs, there is a 'Person ID' field. The main section is titled 'Personal Profile' and contains fields for 'Dependent/Beneficiary ID' (01), 'SUSAN WILLIAMS', and a '+ Add' button. Below this, there are fields for '*Date of Birth', 'Birth Country', 'Date of Death', 'Medicare Entitled Date', 'Birth Location', 'Birth State', and a checkbox for 'Riders/Orders exist'. A 'Dependent Proof' section shows a checked box for 'Qualified Dependent'. At the bottom, the 'Personal History' section is visible, showing a table with columns for '*Effective Date', '*Relationship to Employee', '*Dependent Beneficiary Type', '*Gender', and '*Marital Status'. The first row in the table has the following values: 05/01/2026, Spouse, Approved Dependent, Female, and Married. There are '+ Add' and '- Remove' buttons at the end of the table.

	The Effective Date field defaults to the date on which coverage for the dependent will be stopped based on the Life Event being processed (first day of the following month for this scenario due to a Divorce event being processed).
29.	Click the Relationship to Employee dropdown button and select the applicable list item ("ExSpouse" for this scenario). 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action															
	The Dependent Beneficiary Type field updates to “Unapproved Dependent” based on the relationship to employee selection. *Dependent Beneficiary Type Unapproved Dependent															
30.	Click the Marital Status dropdown button and select the applicable list item (“Divorced” for this scenario). *Marital Status Divorced															
31.	Click the OK button at the bottom of the page. OK Cancel Apply															
The BenAdmin Data Entry page redispays. BenAdmin Data Entry × Help Event / Participant Selection Option Election Dependents / Beneficiaries Schedule ID EM00 Employee ID Event ID 6 Event Data 05/01/2026 Divorce Benefit Record 0 Excess Credit Rollover To Forfeit Excess Credits Dependent/Beneficiaries Currently on Record <table><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></td><td>ExSpouse</td><td>Unapproved Dependent</td><td></td></tr><tr><td></td><td>Child</td><td>Approved Dependent</td><td></td></tr></tbody></table> Change/Add Dependent Data Elections Requiring Supplemental Information <table><tbody><tr><td>10</td><td>Medical</td><td>Enroll Dependents</td></tr></tbody></table> OK Cancel Apply Refresh Event / Participant Selection Option Election Dependents / Beneficiaries		Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth		ExSpouse	Unapproved Dependent			Child	Approved Dependent		10	Medical	Enroll Dependents
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth													
	ExSpouse	Unapproved Dependent														
	Child	Approved Dependent														
10	Medical	Enroll Dependents														
	The applicable dependent is updated to an unapproved dependent in the Dependent/Beneficiaries Currently on Record table.															
32.	Click the Option Election tab to update the enrolled dependents. Event / Participant Selection Option Election Dependents / Beneficiaries															



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

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

BenAdmin Data Entry

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

Sched ID EM00 Empl ID 00246068300 CARL WILLIAMS Ben Record 0 Event ID 6
Event Data 05/01/2026 Divorce Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 35 COVA Care + Expanded Dental (ACC2) (Self + Child)

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	
01	SUSAN WILLIAMS	Spouse		☐	Spouse	☐	-
02	SIMON WILLIAMS	Child		☐	Child	☒	-
+							

OK Cancel Apply Refresh

Event / Participant Selection | Option Election | Dependents / Beneficiaries

33. Click the **Enroll All** button.

A message displays in a pop-up window indicating that all dependents will be removed in order to re-enroll the eligible dependents. This is an expected message and not an error.

All existing enrollments for this Plan will be deleted to make room for the new entries. (4000,60)

You have selected to mass enroll all eligible Dependents or Beneficiaries. To make room for these automatic enrollments, all existing individual enrollments will first be removed, along with any current election information.

OK Cancel

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



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

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

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Sched ID EM00

Empl ID

Ben Record 0

Event ID 6

Event Data 05/01/2026

Divorce

Excess Credit Rollover To

Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 35

COVA Care + Expanded Dental (ACC2) (Self + Child)

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	
02		Child		☐	Child	☒	-
+...							

OK

Cancel

Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries

The removed dependent no longer displays in the **Dependents/Beneficiaries** section.

35.

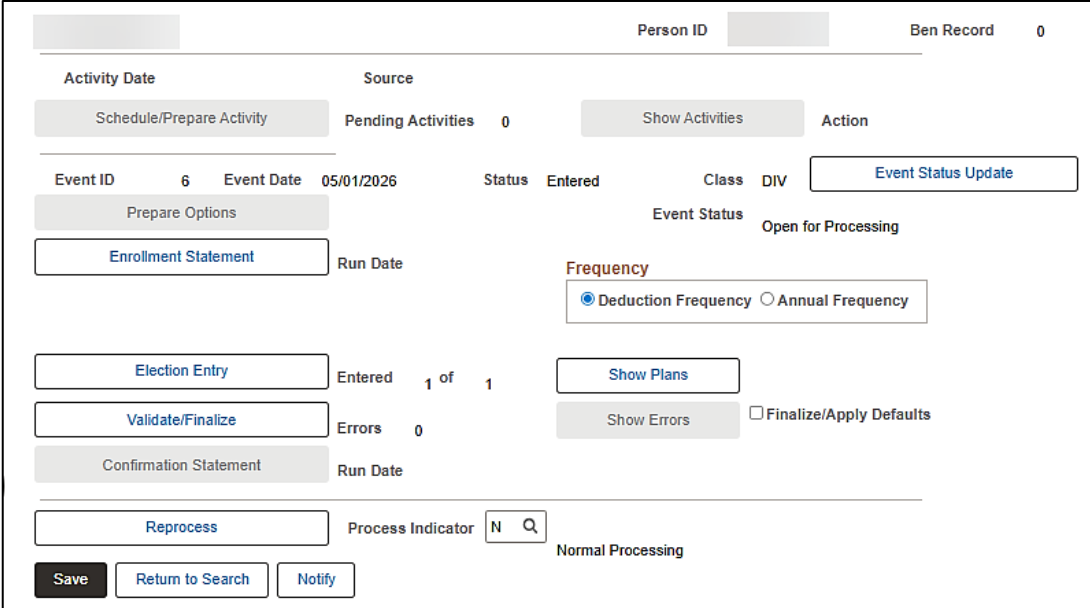
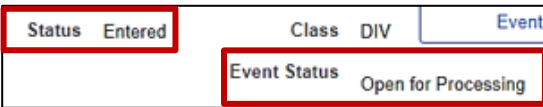
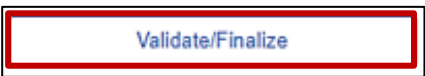
Click the **OK** button at the bottom of the page once all elections have been made/updated.

OK

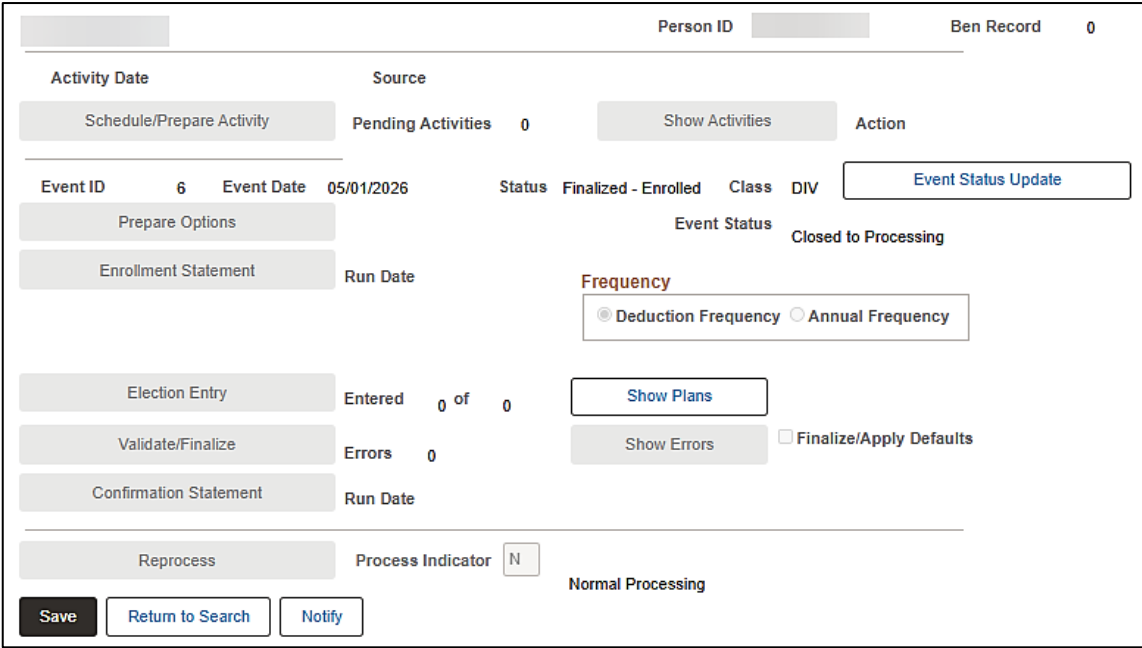
Cancel

Apply

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Process page redisplay. 
	The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”. 
36.	Click the Validate/Finalize button. 
	This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables.
A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 	

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
37.	Click the OK button to close the message. 
The On-Demand Event Process page redisplay. 	
	The Status field will now display as “Finalized-Enrolled”. The Event Status field will display as “Closed to Processing”.
	This process is now complete. Refer to the BN361 Reviewing Employee Benefits Information Job Aid (specifically, the Reviewing the Benefits Summary Page section), located on the Cardinal website in Job Aids under Learning for instructions on how to validate accuracy. For more information pertaining to viewing and printing a Confirmation Statement, refer to the Job Aid titled BN361 How to Review Benefits Statements, located on the Cardinal website in Job Aids under Learning.

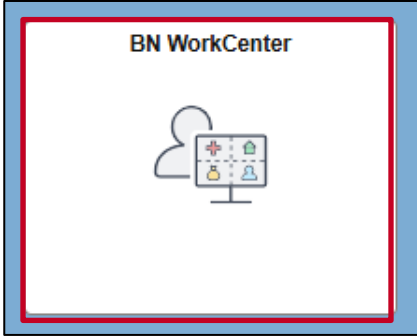
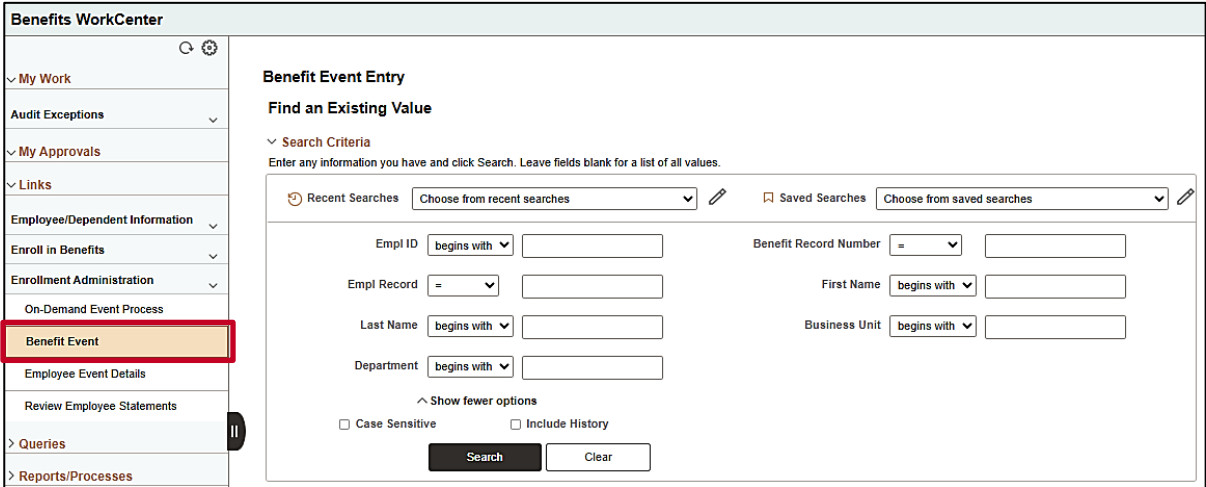
BN361 Creating and Completing a Life Event on Behalf of an Employee**Creating a Birth Event on Behalf of an Employee (with a tag along dependent)**

This section of the Job Aid should be referenced when creating and processing a Birth Event on behalf of the employee wherein one or more tag along dependents will also be added to the employee's coverage. The steps included in this section of the Job Aid are based on the following example scenario.

Scenario: An employee had a child born on 4/21/2026. This employee is currently enrolled in a "Single" coverage code Health Plan. The employee submitted the appropriate supporting documentation for the birth and a benefits enrollment request form on 4/24/2026 to add their new child as a dependent and enroll them in their benefits. Additionally, the employee now wants to add their spouse to their coverage as a tag along dependent (eligible based on the qualifying birth event). Finally, the employee also now wants to enroll in the Flex Spending Dependent Care plan. The employee did not initiate this Qualifying Mid-Year Birth Event through Employee Self-Service (ESS). As the BN Administrator, you need to create and process multiple Benefit Events for this employee based on the following guidelines:

- Separate Benefit Events will be created for each of these enrollment changes as they will have different coverage begin dates.
- The Health Plan coverage begin date for the newborn child will be immediate on the child's date of birth (4/21/2026 for this scenario).
- The Health Plan coverage begin date for the employee's spouse will be the first of the month of the birth event (4/1/2026 for this scenario).
- The enrollment in the Flex Spending Dependent Care plan will be effective as of the first of the month following the employee's enrollment (5/1/2026 for this scenario).
- These Benefit Events must be processed in the correct order (based on the coverage begin and effective dates). Specifically for this scenario, the tag along dependent must be enrolled first because that Benefit Event has the earliest coverage begin date. Subsequently, the newborn child can be enrolled next (separate Benefit Event being processed), and finally, the Flex Spending Dependent Care Plan Benefit Event can be processed.
- After the Benefit Event is processed to add the tag along dependent, the dependent's enrollment will be transmitted to the Health Vendor in the evening interface file. This must be completed before the Benefit Event to add the newborn child is processed. Therefore, the first Benefit Event to add the tag along dependent must be processed on one day (enrollment transmitted to the Health Vendor on that evening's interface file) and the Benefit Event to add the newborn child can be processed the next day (enrollment transmitted to the Health Vendor on that evening's interface file). **These Benefit Events must be processed one day apart so that the Health Vendor is notified as of each effective date.**

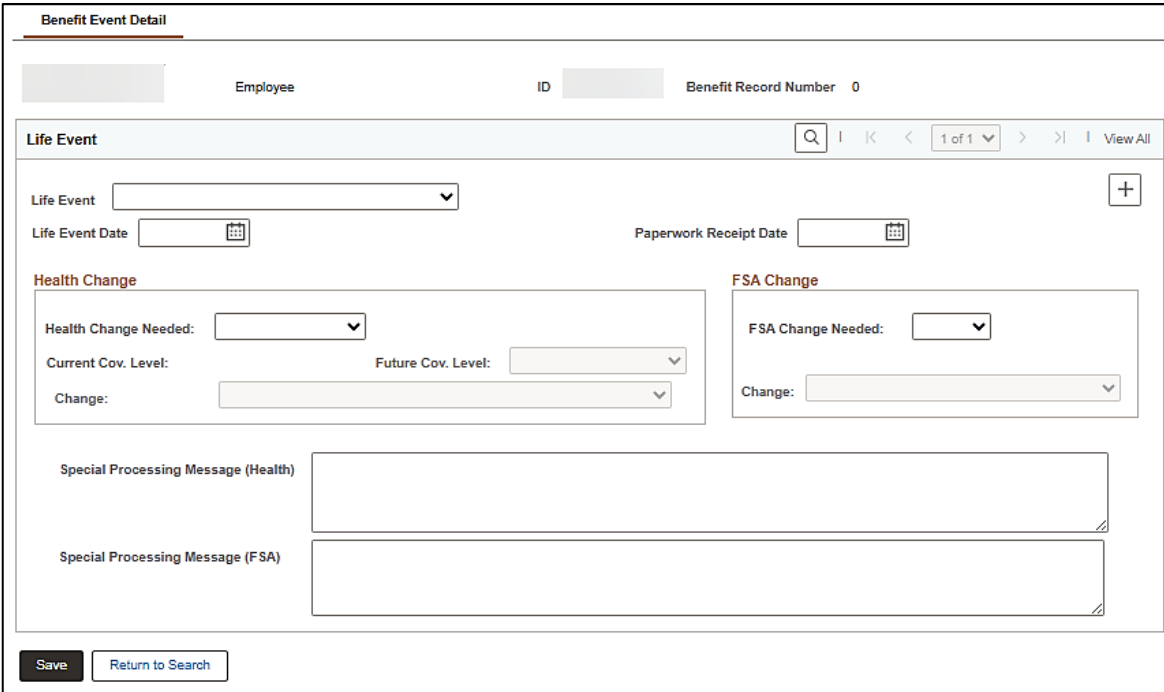
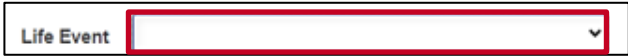
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
1.	Navigate to the Benefit Event page by clicking the BN WorkCenter tile. 
	For more information pertaining to WorkCenters, see the Job Aid titled Overview of Cardinal HCM WorkCenters located on the Cardinal website in Job Aids under Learning.
2.	Use the following navigation path in the WorkCenter: Links > Enrollment Administration > Benefit Event Note: WorkCenter sections, folders, and pages may vary based on the user's Security roles. 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Benefit Event Entry Find an Existing Value Search page displays. Benefit Event Entry Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches ▼ Saved Searches Choose from saved searches ▼ Empl ID begins with ▼ Benefit Record Number = ▼ Empl Record = ▼ First Name begins with ▼ Last Name begins with ▼ Business Unit begins with ▼ Department begins with ▼ ^ Show fewer options ☐ Case Sensitive ☐ Include History Search Clear

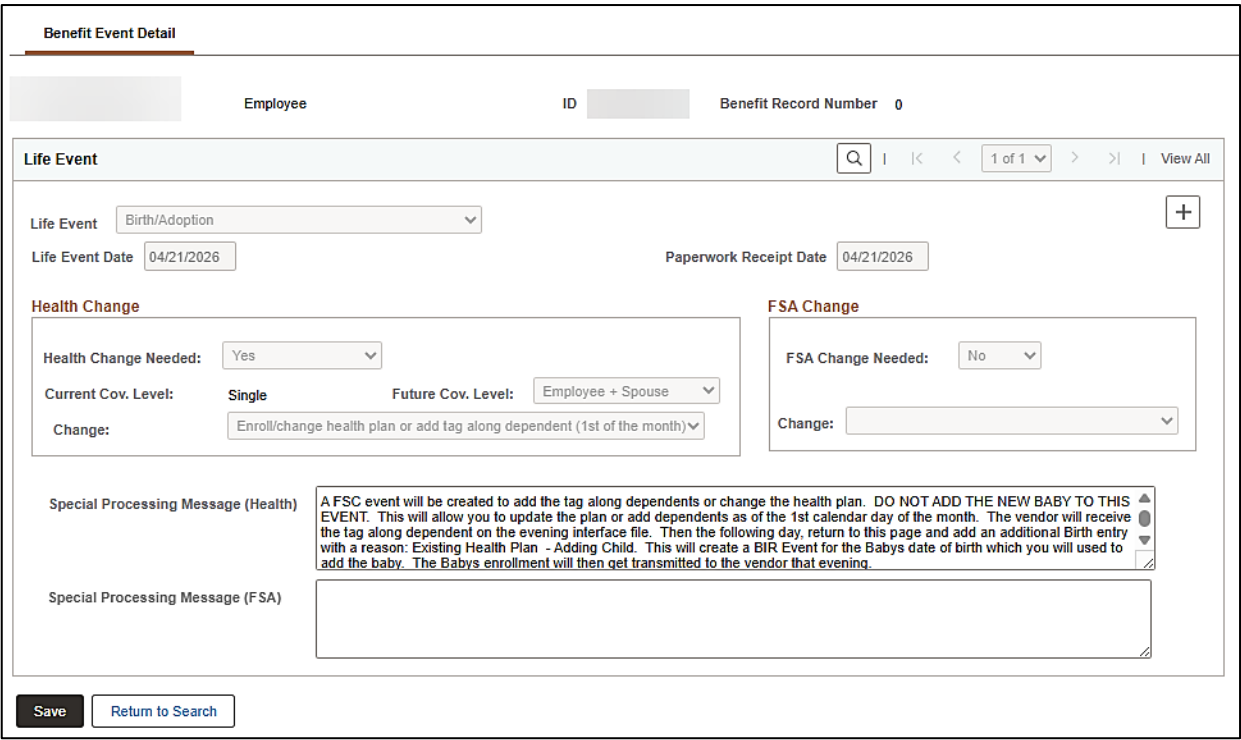
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Benefit Event Detail page displays for the selected employee. 
5.	Click the Life Event dropdown button and select the applicable Life Event (“Birth/Adoption” for this scenario). 
6.	Click the Life Event Date Calendar icon and select the applicable date (“4/21/2026” for this scenario). 
	This is the date of the actual event (marriage, birth, divorce, etc.).
7.	Click the Paperwork Receipt Date Calendar icon and select the applicable date (“4/24/2026” for this scenario). 
	This is the date that the Benefits Enrollment form was received from the employee.

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
8.	Click the Health Change Needed dropdown button and select "Yes". Note: Even if the Life Event does not require a change in the Health Plan Coverage Code, but it will require changes to the covered dependent(s), select "Yes". If "Yes" is not selected, a Benefit Event will not be created Health Change Needed:
	The Current Cov. Level field auto-populates with the employee's current Health Plan enrollment coverage level.
9.	Click the Future Cov. Level dropdown button and select the applicable coverage level. Future Cov. Level:
	The coverage levels available for selection are: • "Single, Employee" • "Employee + Spouse" • "Employee + CH (Child)" • "Family" • "Waive Coverage" Please note that this does not actually change the employee's enrollment. This will be done when the Life Event is processed.
10.	Click the Change dropdown button and select the applicable health coverage change. Note: For this scenario, "Enroll/change health plan or add tag along dependent (1st of the month)" will be selected. Change:
	The selections available will vary based on the type of Life Event previously selected.
	Do not enter any information in the FSA Change section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
11.	Click the Save button. Save Return to Search
The Benefit Event Detail page refreshes. 	
	After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field. In this scenario, an FSC Benefit Event has been created solely for the purpose of adding and enrolling the employee's tag along dependent. This Benefit Event has a coverage begin date of the first of the birth month ("4/1/2026" in this scenario). <u>Do not utilize this Benefit Event to add and enroll the newborn child dependent.</u> The first Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.
12.	Navigate to the On-Demand Event Process page using the following path from the Benefits WorkCenter: Links > Enrollment Administration > On-Demand Event Process

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Maintenance Find an Existing Value Search page displays. On-Demand Event Maintenance Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.  Recent Searches Choose from recent searches ▼  Saved Searches Choose from saved searches ▼ Empl ID begins with ▼ Empl Record = ▼ Name begins with ▼ Last Name begins with ▼ Second Last Name begins with ▼ Alternate Character Name begins with ▼ ^ Show fewer options ☐ Case Sensitive Search Clear



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **On-Demand Event Process** page displays for the applicable employee.



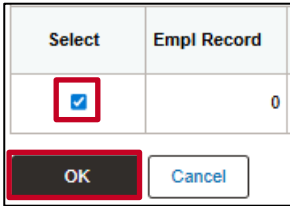
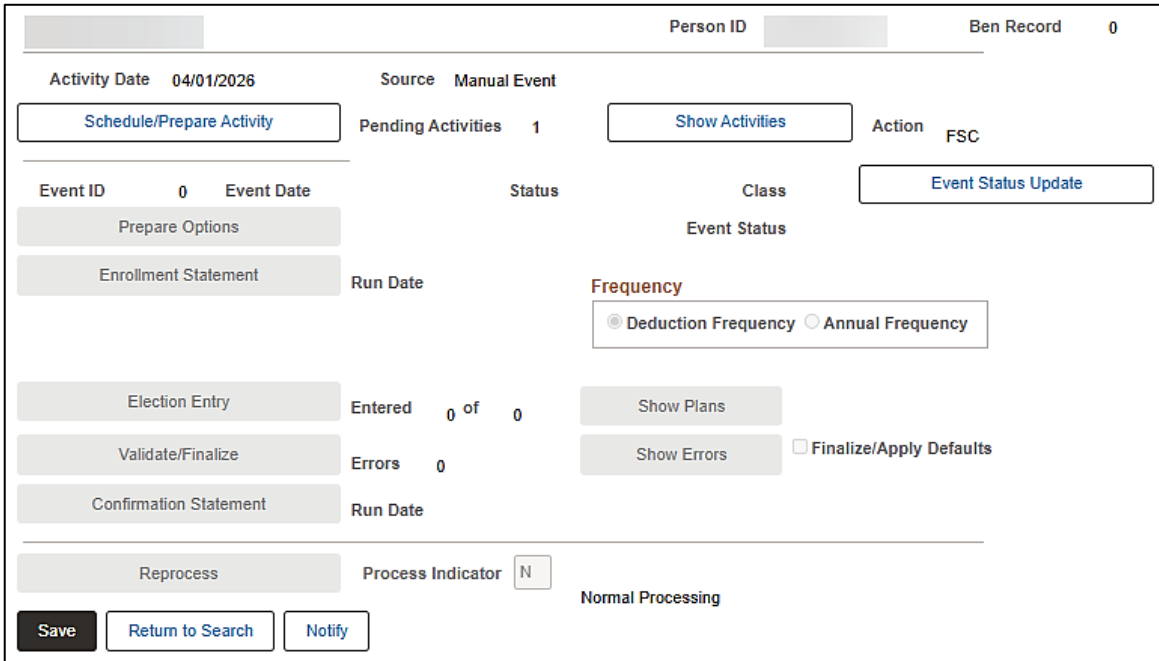
Review the **Activity Date** field. For Life Events, this date will populate based on the coverage begin date for the applicable type of Life Event. For this scenario, the Benefit Event is being processed to add a tag along dependent based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the first day of the month wherein the birth took place ("4/1/2026"). Ensure that this date is accurate.

The **Source** field will be "Manual Event". The **Action** field will default based on the type of Life Event ("FSC" for this scenario).

15. Click the **Show Activities** button.

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

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
16.	Ensure that the Select checkbox option for the Benefit Event is selected and then click the OK button. 
The On-Demand Event Process page redisplay. 	
17.	If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a "0". In this case, proceed to Step 19. If the Pending Activities field displays a "1", click the Schedule/Prepare Activity button. Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. 



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. Process completed successfully. (3000,530) OK
18.	Click the OK button to close the message. OK
	The On-Demand Event Process page redispays. Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 5 Event Date 04/01/2026 Status Prepared Class FSC Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency Election Entry Entered 0 of 2 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
19.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. Note: If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line. Status Prepared Class FSC Event Status Event Status Open for Processing



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
20.	Click the Election Entry button. 

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

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Sched ID EM00

Empl ID

Ben Record 0

Event ID 5

Event Data 04/01/2026

Benefit Change (BA Use)

Excess Credit Rollover To

Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 33

COVA Care + Expanded Dental (ACC2) (Single)

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

Plan Type AY : Health Premium Reward

Option Code 2

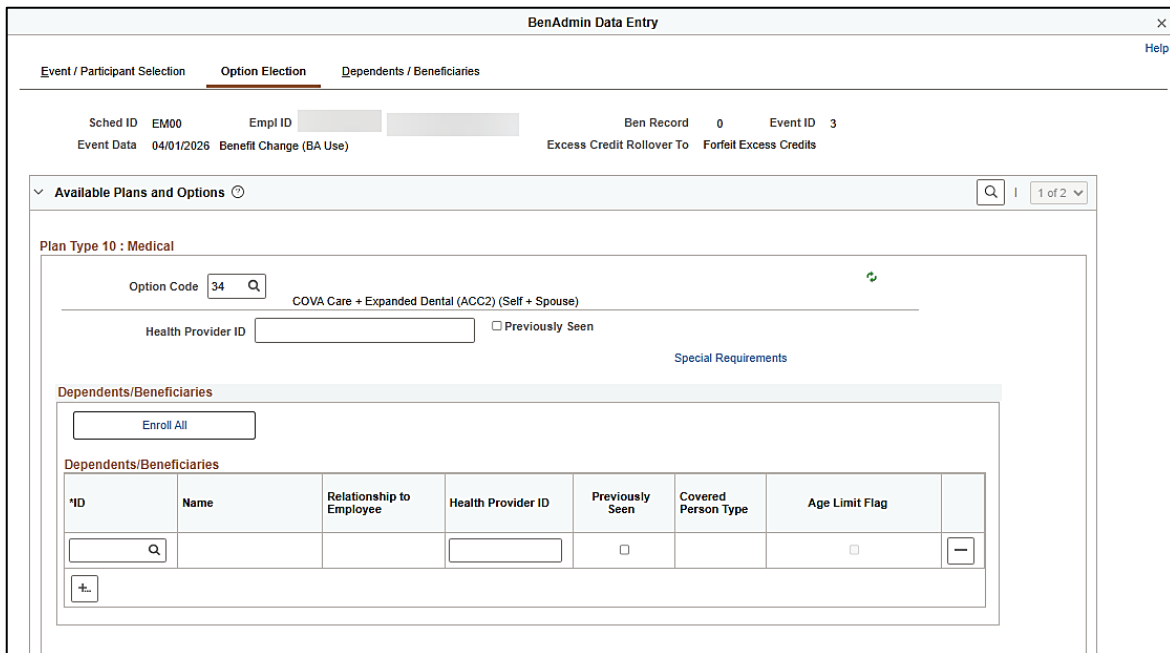
Premium Reward Par Only (PRWDEE)

Special Requirements

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
21.	Select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the Option Code Look up icon (magnifying glass) within the Plan Type 10: Medical section and select the applicable coverage code. The Coverage Codes are as follows: 1 – Single 2 – Employee + Spouse 3 – Employee + Child (except for Tricare) 4 – Employee + 2 or More Dependents (Family – except for Tricare) 8 – Employee + Child(ren) (Tricare only) 9 – Family (EE + SP + Child/ren for Tricare only) Plan Type 10 : Medical Option Code 34  COVA Care + Expanded Dental (ACC2) (Self + Spouse)
	For this Benefit Event, only select the applicable coverage code based on the tag along dependent(s) being added. The coverage code will be changed again as needed when the Birth Event to add the newborn is processed. For this scenario, Option Code "34" has been selected.

The **Option Election** page redisplay.



BenAdmin Data Entry

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

Sched ID EM00 Empl ID Ben Record 0 Event ID 3

Event Data 04/01/2026 Benefit Change (BA Use) Excess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 

COVA Care + Expanded Dental (ACC2) (Self + Spouse)

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
				☐		☐
						



Benefits Job Aid

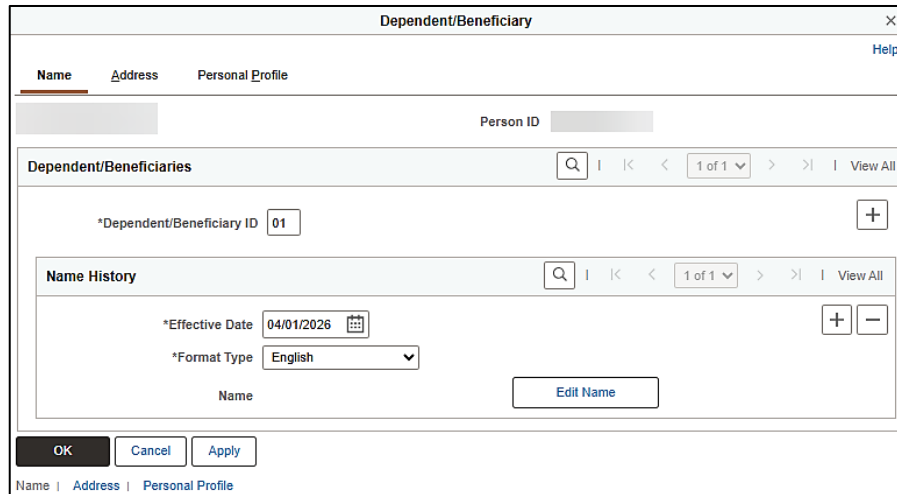
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action											
22.	Click the Dependents / Beneficiaries tab to add the tag along dependent(s). Event / Participant Selection Option Election Dependents / Beneficiaries											
The Dependent / Beneficiaries page displays. BenAdmin Data Entry Event / Participant Selection Option Election Dependents / Beneficiaries Schedule ID EM00 Employee ID Event ID 3 Event Data 04/01/2026 Benefit Record 0 Benefit Change (BA Use) Excess Credit Rollover To Forfeit Excess Credits Dependent/Beneficiaries Currently on Record <table><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr><tr><td></td><td></td><td></td><td></td></tr></table> Change/Add Dependent Data Elections Requiring Supplemental Information <table><tr><td>10</td><td>Medical</td><td>Enroll Dependents</td></tr></table> OK Cancel Apply Refresh Event / Participant Selection Option Election Dependents / Beneficiaries		Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth					10	Medical	Enroll Dependents
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth									
10	Medical	Enroll Dependents										
23.	Click the Change/Add Dependent Data link. Change/Add Dependent Data											

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.




For Life Events, the **Effective Date** field defaults to the date that the coverage will begin. For this scenario, a tag along dependent is being added based on a Birth event. Therefore, the **Effective Date** field defaults to the first day of the month wherein the birth took place.

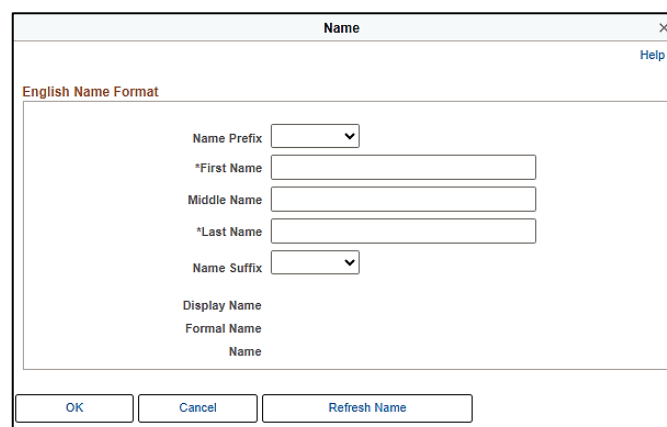
Do not change this date as it must match the Event Date, or the system will not recognize this dependent as eligible for coverage.

The **Dependent/Beneficiary ID** field will default to the next available Dependent/Beneficiary ID number ("01" in this scenario) and increment by 1 for each additional dependent subsequently added.

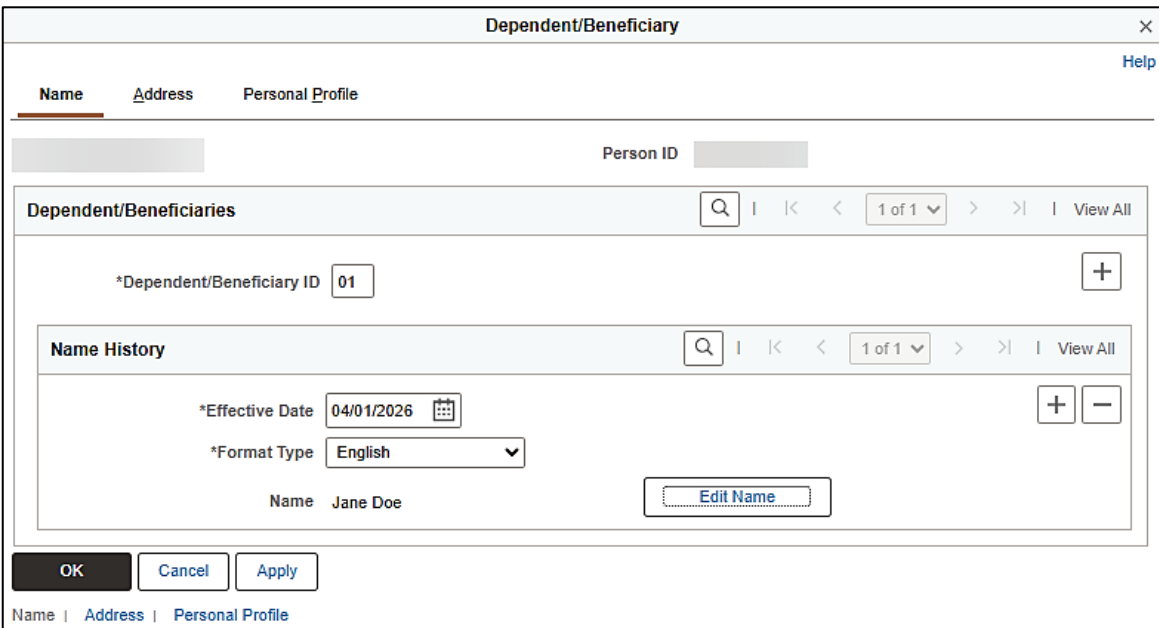
24. Click the **Edit Name** button.



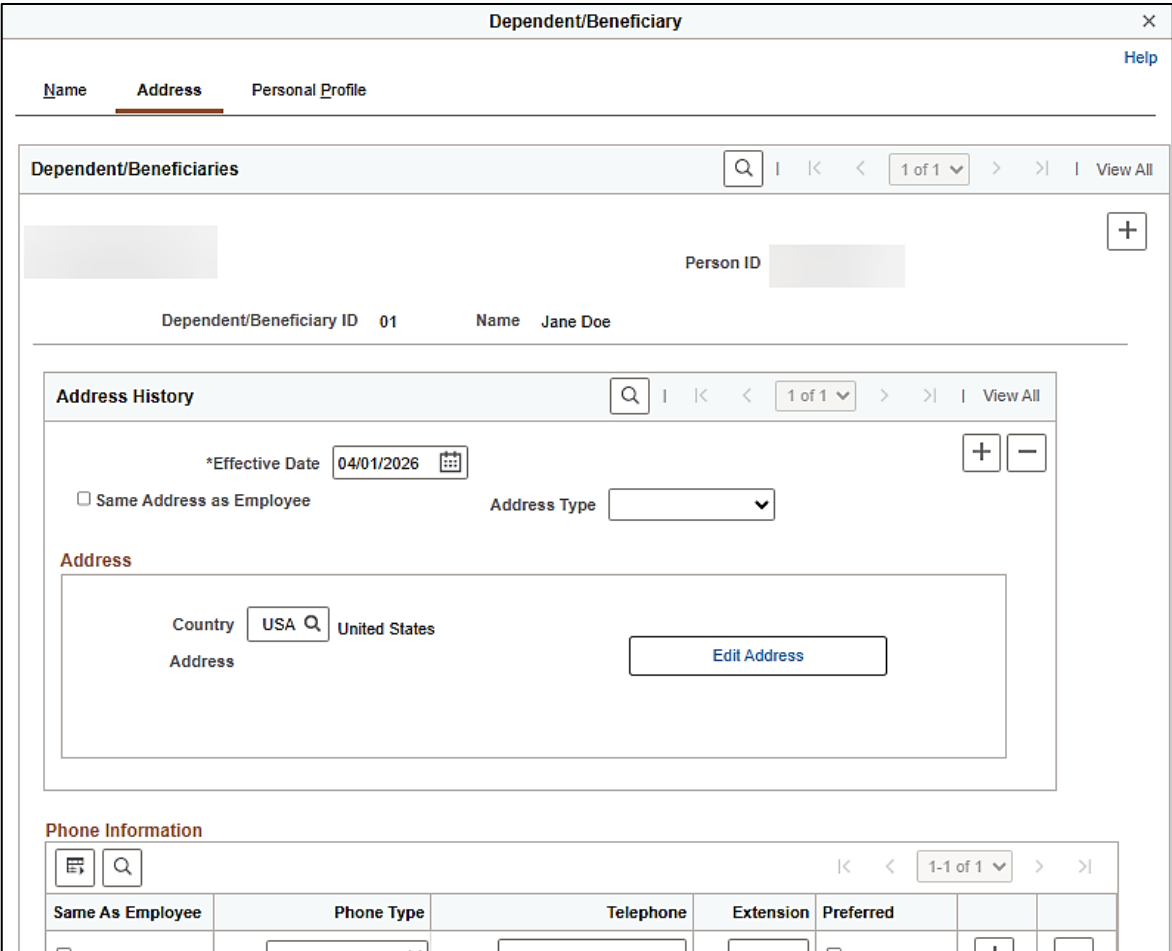
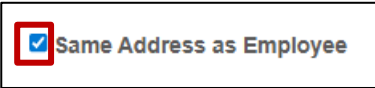
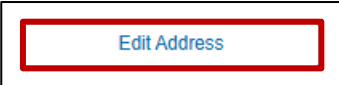
The **Name** page displays in a pop-up window.



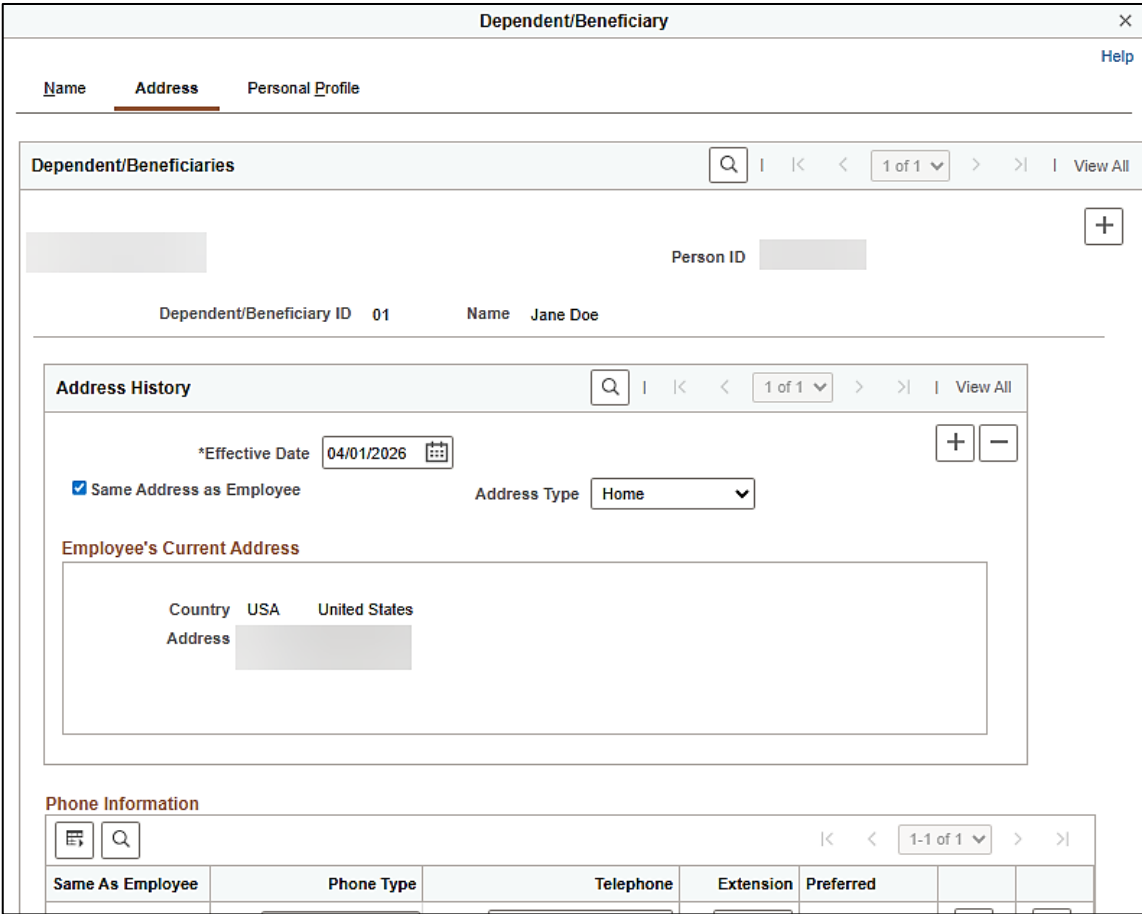
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
25.	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. Note: Do not use accent marks or special characters in the name fields. These are not recognized and can cause errors when uploading to the Vendor. 
26.	Click the OK button. 
The Name page redisplays. 	
	The Display Name field auto-populates with the name information previously entered.
27.	Click the Address tab. 

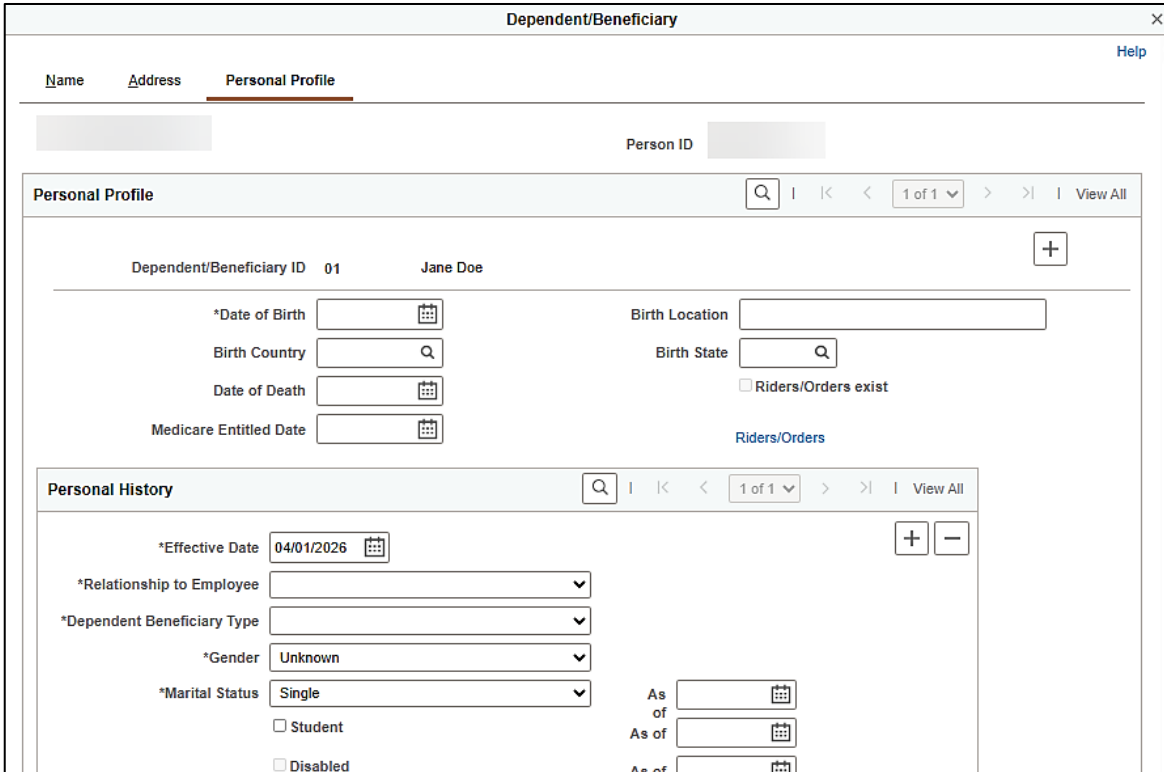
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Address page displays. 
28.	Select the Same Address as Employee checkbox option if applicable. For this scenario, the checkbox is selected. 
	Users can also complete the address information as applicable for the dependent by selecting the applicable Address Type using the dropdown button provided 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). 

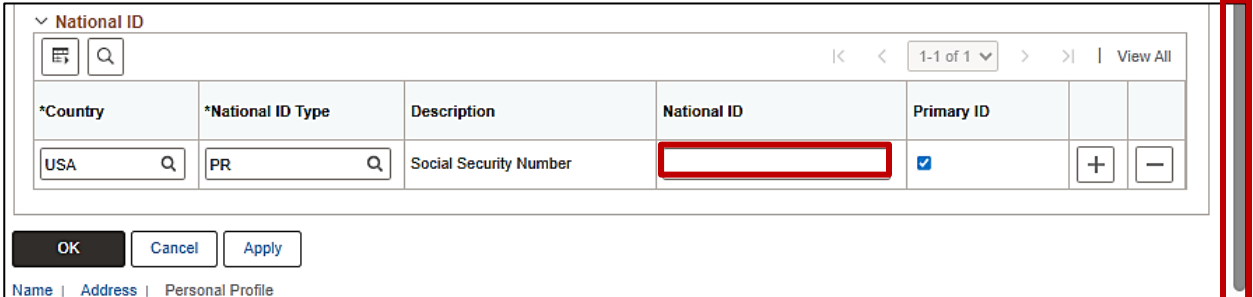
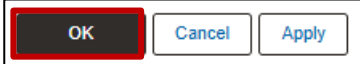
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Address page refreshes. 
	The address information auto-populates in the Employee's Current Address section.
29.	Click the Personal Profile tab. 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Personal Profile page displays. 
	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).
30.	Click the Date of Birth Calendar icon and select the dependent's date of birth. 
31.	Click the Relationship to Employee dropdown button and select the dependent's relationship to the employee ("Spouse" for this scenario). 
32.	Click the Dependent Beneficiary Type dropdown button and select "Approved Dependent". 

BN361 Creating and Completing a Life Event on Behalf of an Employee

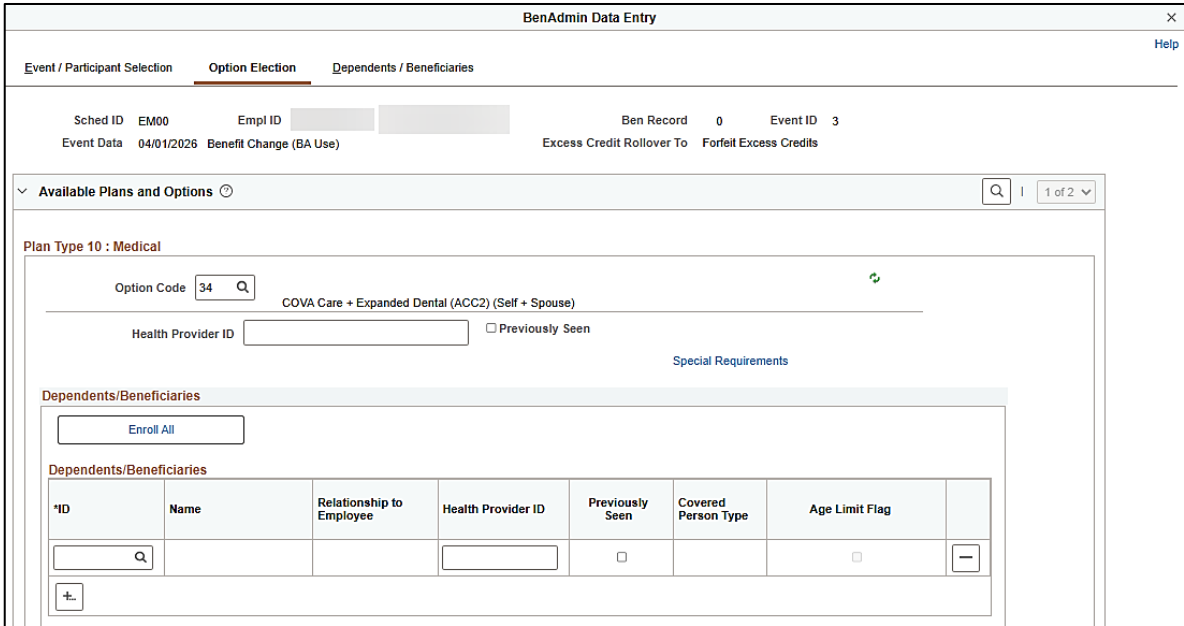
Step	Action
	“Approved Dependent” is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.
33.	Click the Gender dropdown button and select the dependent’s gender: “Unknown”, “Male”, or “Female” (“Female” for this scenario). Note: For benefits purposes, “Male” or “Female” must be selected. If unsure at the time of entry, select “Unknown” and update once Gender is confirmed. 
34.	The Marital Status field defaults to “Single”. Update as needed for the dependent (“Married” for this scenario). Note: If any status other than “Single” is selected, confirm or select the applicable date using the Marital Status As of Calendar icon (For this scenario, “04/01/2026” auto-populates based on the Life Event and Change reason selected). 
35.	Click the vertical scrollbar to scroll down on the page to the National ID section and enter the dependent’s Social Security Number (SSN) in the National ID field. 
	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 by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.
36.	Click the OK button. 



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action											
	The Dependents / Beneficiaries page redisplay. BenAdmin Data Entry Event / Participant Selection Option Election Dependents / Beneficiaries Schedule ID EM00 Employee ID Event ID 3 Event Data 04/01/2026 Benefit Record 0 Benefit Change (BA Use) Excess Credit Rollover To Forfeit Excess Credits Dependent/Beneficiaries Currently on Record <table><tr><th>Name</th><th>Relationship to Employee</th><th>Dependent Beneficiary Type</th><th>Date of Birth</th></tr><tr><td>Jane Doe</td><td>Spouse</td><td>Approved Dependent</td><td>05/21/1998</td></tr></table> Change/Add Dependent Data Elections Requiring Supplemental Information <table><tr><td>10</td><td>Medical</td><td>Enroll Dependents</td></tr></table> OK Cancel Apply Refresh Event / Participant Selection Option Election Dependents / Beneficiaries	Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth	Jane Doe	Spouse	Approved Dependent	05/21/1998	10	Medical	Enroll Dependents
Name	Relationship to Employee	Dependent Beneficiary Type	Date of Birth									
Jane Doe	Spouse	Approved Dependent	05/21/1998									
10	Medical	Enroll Dependents										
	The dependent just added displays in the Dependent/Beneficiaries Currently on Record section. If additional tag along dependents needs to be added, repeat Steps 23 - 36 for each additional tag along dependent (for this scenario, no additional tag along dependents are being added).											
37.	Click the Option Election tab. Event / Participant Selection Option Election Dependents / Beneficiaries											

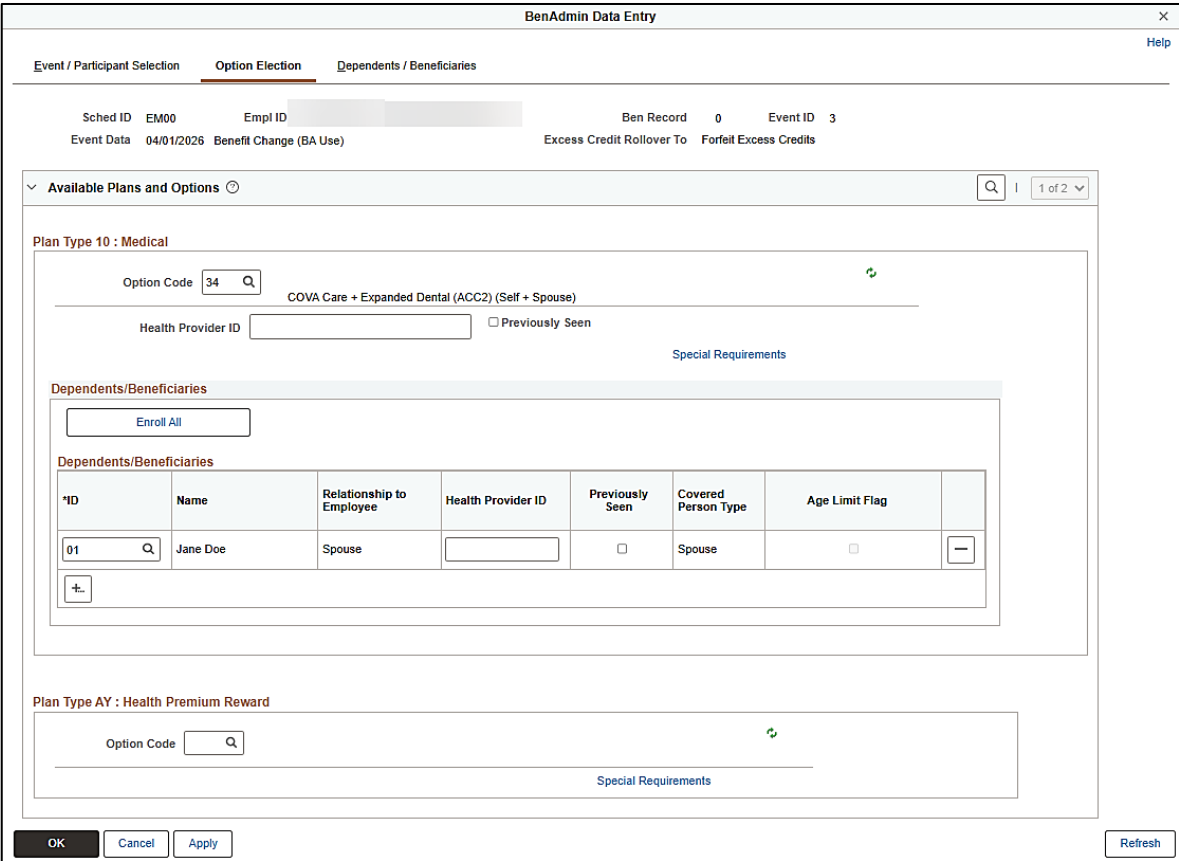
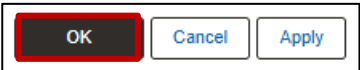
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Option Election page displays. 
38.	Next, enroll the dependent(s) in the previously selected Medical Plan by clicking the Enroll All button if all dependents will be enrolled (applicable for this scenario). 
	Users can also enroll the dependent(s) in the previously selected Medical Plan by 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 (+...).

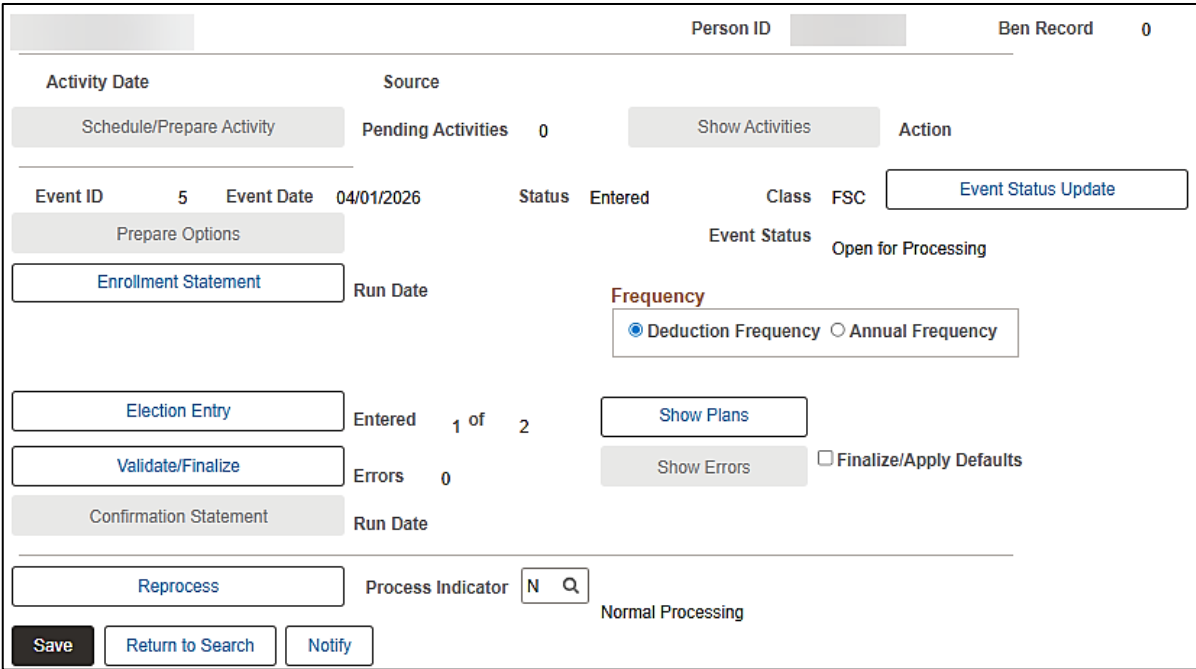
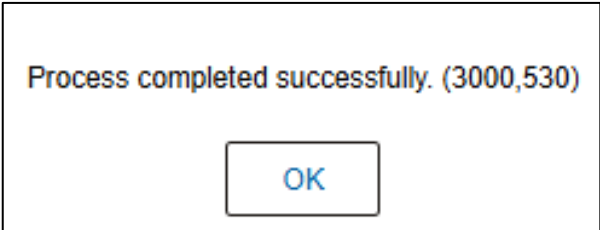


Benefits Job Aid

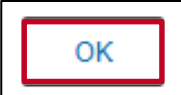
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Option Election page redisplay. 
39.	The enrolled dependents display in the Dependents/Beneficiaries section. Validate for accuracy and ensure that all applicable dependents are listed.
40.	Click the OK button. 

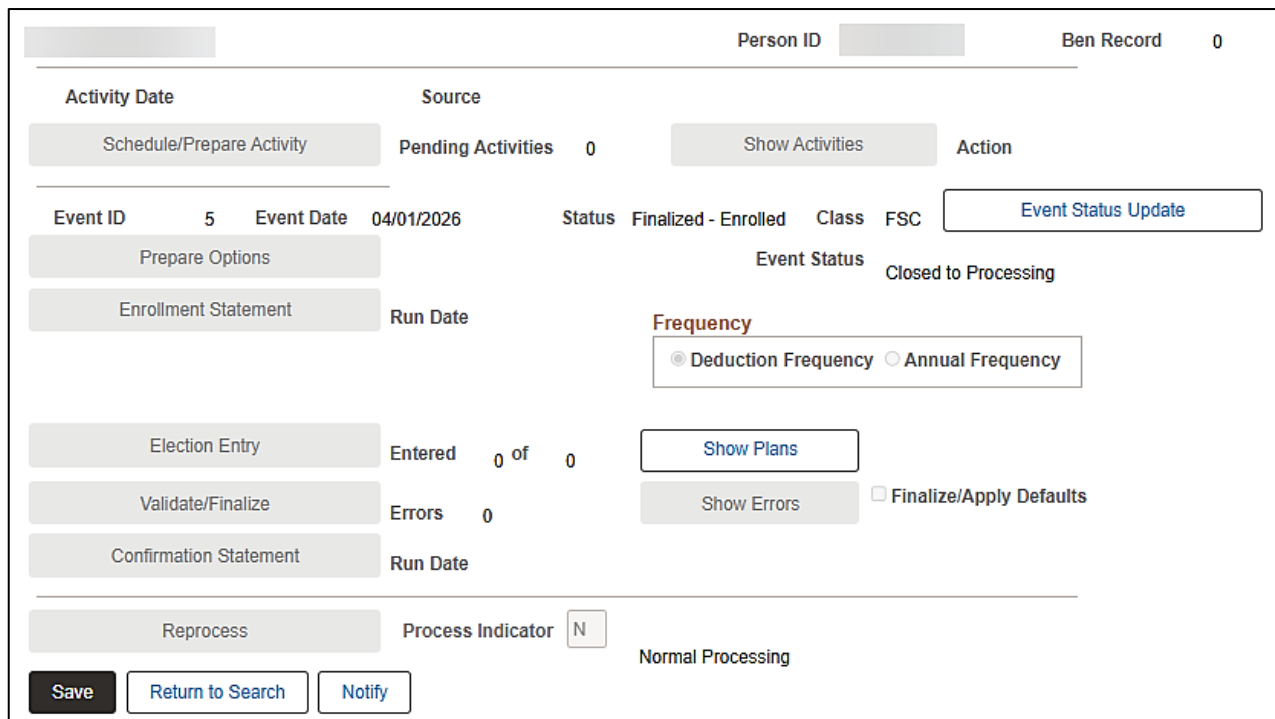
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Process page redisplay. 
	The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.
41.	Click the Validate/Finalize button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables. 
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
42.	Click the OK button to close the message. 

The **On-Demand Event Process** page redisplay.

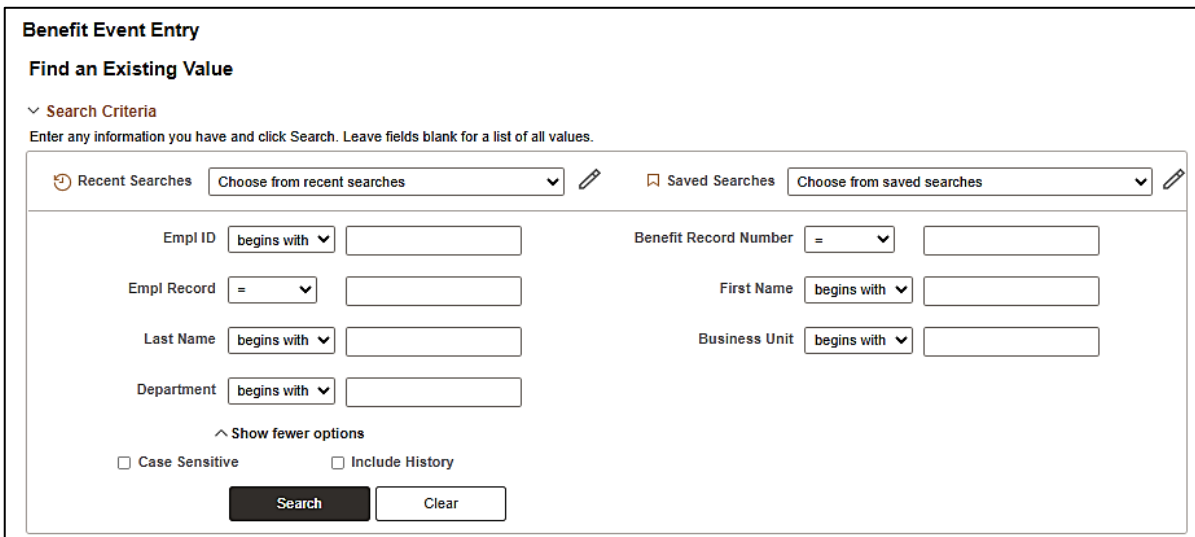


The screenshot shows the 'On-Demand Event Process' page. At the top, there are fields for 'Person ID' and 'Ben Record' (0). Below this is a section for 'Activity Date' and 'Source'. A 'Schedule/Prepare Activity' button is visible, along with 'Pending Activities' (0) and a 'Show Activities' button. An 'Event ID' of 5 is shown, along with 'Event Date' 04/01/2026, 'Status' Finalized - Enrolled, 'Class' FSC, and 'Event Status' Closed to Processing. There are buttons for 'Event Status Update', 'Prepare Options', 'Enrollment Statement', 'Run Date', 'Frequency' (with radio buttons for 'Deduction Frequency' and '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), and 'Normal Processing'. At the bottom are 'Save', 'Return to Search', and 'Notify' buttons.

	The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.
	This Benefit Event to add the tag along dependent(s) is now complete. Refer to the BN361 Reviewing Employee Benefits Information Job Aid (specifically, the Reviewing the Benefits Summary Page section), located on the Cardinal website in Job Aids under Learning for instructions on how to validate accuracy. For more information pertaining to viewing and printing a Confirmation Statement, refer to the Job Aid titled BN361 How to Review Benefits Statements, located on the Cardinal website in Job Aids under Learning. This information will be transmitted to the Health Vendor in the evening interface file. On the next business day, proceed to Step 43. Next, the Benefit Event must be created in order to add the newborn child dependent.



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
43.	Navigate to the Benefit Event page using the following navigation path in the Benefits WorkCenter: Links > Enrollment Administration > Benefit Event
The Benefit Event Entry Find an Existing Value Search page displays. 	
44.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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. 
45.	Click the Search button. 



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Benefit Event Detail page displays for the selected employee. Benefit Event Detail Employee ID [redacted] Benefit Record Number 0 Life Event Life Event Birth/Adoption Life Event Date 04/21/2026 Paperwork Receipt Date 04/24/2026 Health Change Health Change Needed: Yes Current Cov. Level: Single Future Cov. Level: Employee + Spouse Change: Enroll/change health plan or add tag along dependent (1st of the month) FSA Change FSA Change Needed: No Change: Special Processing Message (Health) A FSC event will be created to add the tag along dependents or change the health plan. DO NOT ADD THE NEW BABY TO THIS EVENT. This will allow you to update the plan or add dependents as of the 1st calendar day of the month. The vendor will receive the tag along dependent on the evening interface file. Then the following day, return to this page and add an additional Birth entry with a reason: Existing Health Plan - Adding Child. This will create a BIR Event for the Babys date of birth which you will use to add the baby. The Babys enrollment will then get transmitted to the vendor that evening. Special Processing Message (FSA) Save Return to Search
46.	Click the Add a new row icon (+).



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Benefit Event Detail page refreshes and the new row displays. Benefit Event Detail Employee ID Benefit Record Number 0 Life Event Life Event Life Event Date Paperwork Receipt Date Health Change Health Change Needed: Current Cov. Level: Change: Future Cov. Level: FSA Change FSA Change Needed: Change: Special Processing Message (Health) Special Processing Message (FSA) Save Return to Search
47.	Click the Life Event dropdown button and select the applicable type of Life Event (Birth/Adoption in this scenario). Life Event
48.	Click the Life Event Date Calendar icon and select the applicable date ("4/21/2026" in this scenario). This is the date of birth for the newborn dependent. Life Event Date
49.	Click the Paperwork Receipt Date Calendar icon and select the applicable date ("4/24/2026" in this scenario). This is the date that the Benefits Enrollment form was received from the employee. Paperwork Receipt Date

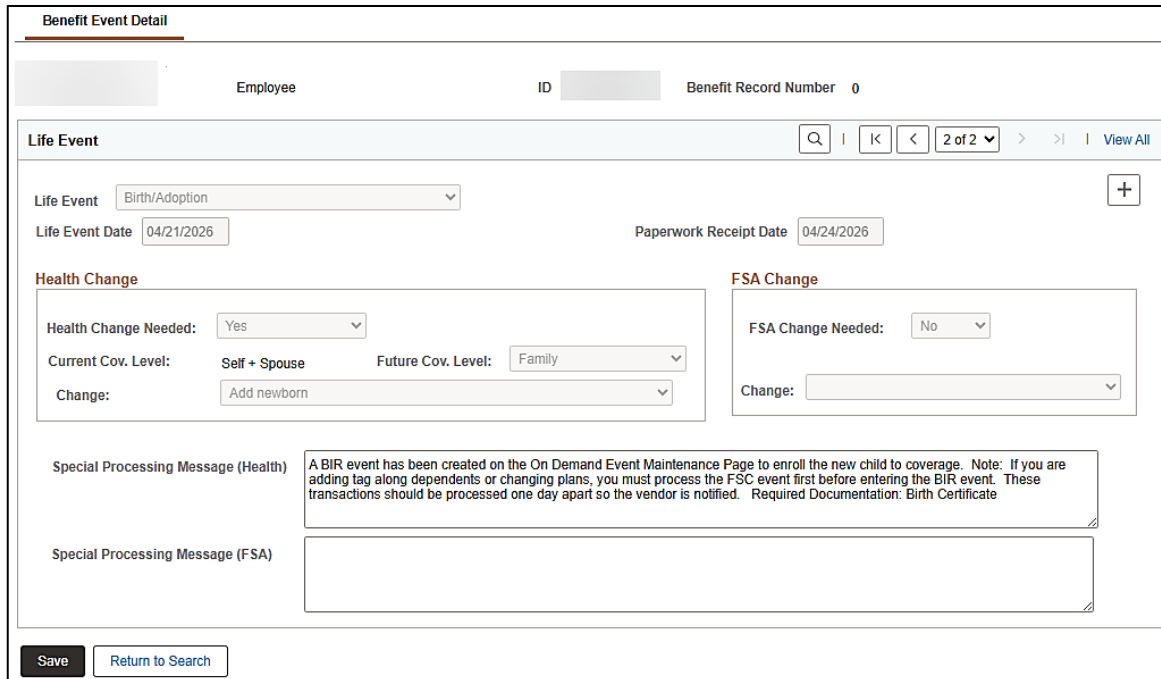
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
50.	Click the Health Change Needed dropdown button and select “Yes”. Note: Even if the Life Event does not require a change in the Health Plan Coverage Code for the employee, select “Yes”. If “Yes” is not selected, a Benefit Event will not be created. Health Change Needed:
The Benefit Event Detail page refreshes. Benefit Event Detail Employee ID Benefit Record Number 0 Life Event Life Event Birth/Adoption Life Event Date 04/21/2026 Paperwork Receipt Date 04/24/2026 Health Change Health Change Needed: Yes Current Cov. Level: Self + Spouse Future Cov. Level: Change: FSA Change FSA Change Needed: Change: Special Processing Message (Health) Special Processing Message (FSA) Save Return to Search	
	The Current Cov. Level field auto-populates with the employee’s current Health Plan enrollment coverage level.
51.	Click the Future Cov. Level dropdown button and select the applicable coverage level (“Family” for this scenario). Future Cov. Level:

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The coverage levels available for selection are: • “Single, Employee” • “Employee + Spouse” • “Employee + CH (Child)” • “Family” • “Waive Coverage” Please note that this does not actually change the employee’s enrollment. This will be done when the Life Event is processed. For this Benefit Event, select the applicable coverage code based on the newborn dependent being added (“Family” for this scenario).
52.	Click the Change dropdown button and select “Add newborn”. Note: The selections available will vary based on the type of Life Event previously selected. Change:
	Do not enter any information in the FSA Change section. Even though the employee is also electing to enroll in the Flex Spending Dependent Care plan for this scenario, the effective date for that enrollment will be different and therefore, will be created later in this process as a separate Benefit Event.
53.	Click the Save button. Save Return to Search

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Benefit Event Details page refreshes. 
	After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) fields. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field. In this scenario, a BIR Benefit Event has been created for the purpose of adding and enrolling the employee's newborn dependent. This Benefit Event has a coverage begin date of the actual date of birth ("4/21/2026" in this scenario). This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.
54.	Navigate to the On-Demand Event Process page using the following navigation path in the Benefits WorkCenter: Links > Enrollment Administration > On-Demand Event Process



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Maintenance Find an Existing Value Search page displays. On-Demand Event Maintenance Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Empl Record = Name begins with Last Name begins with Second Last Name begins with Alternate Character Name begins with ^ Show fewer options ☐ Case Sensitive Search Clear
55.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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. Empl ID begins with
56.	Click the Search button. Search Clear



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Process page displays for the selected employee. Person ID Ben Record 0 Activity Date 04/21/2026 Source Manual Event Schedule/Prepare Activity Pending Activities 1 Show Activities Action BIR Event ID 0 Event Date Status Class Event Status Update Prepare Options 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



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

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

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

Person ID [redacted] Ben Record 0

BAS Activity

1-1 of 1

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action
☒	0	Manual Event	04/21/2026	0	BIR	

OK Cancel

59. Ensure that the **Select** checkbox option for the Benefit Event is selected and then click the **OK** button.

Select	Empl Record
☒	0

OK Cancel

The **On-Demand Event Process** page redisplay.

Person ID [redacted] Ben Record 0

Activity Date 04/21/2026 Source Manual Event

Schedule/Prepare Activity Pending Activities 1 Show Activities Action BIR

Event ID 0 Event Date Status Class Event Status

Prepare Options

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

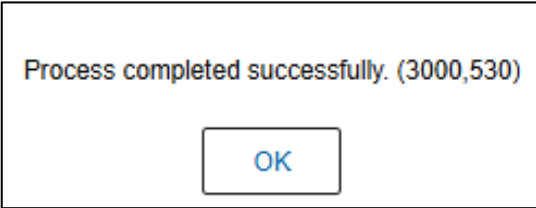
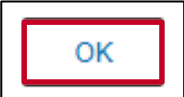
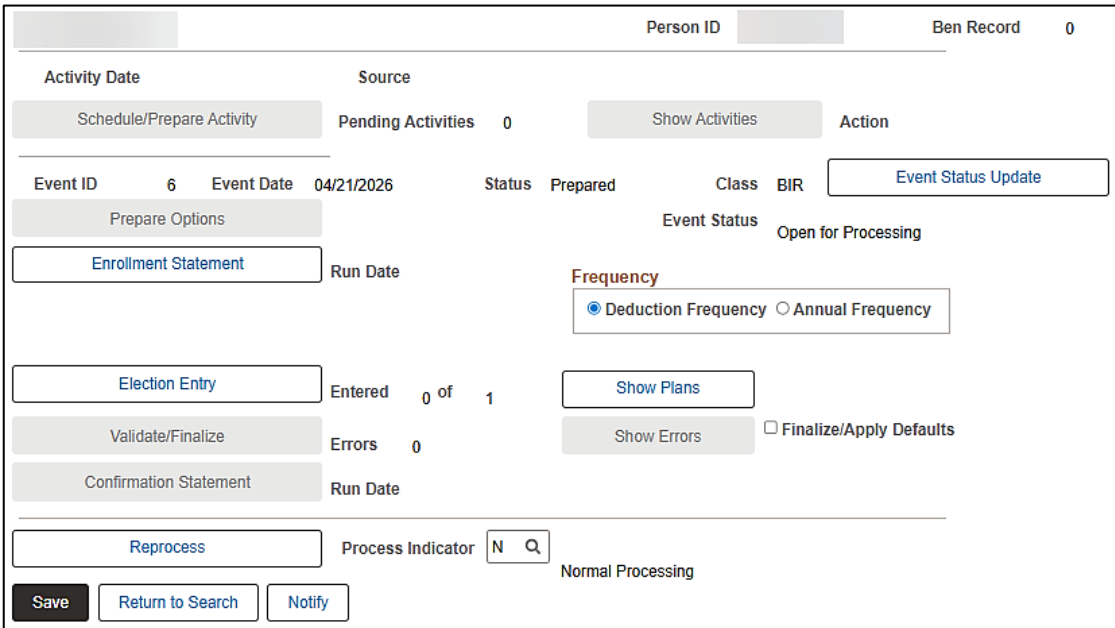
Confirmation Statement Run Date

Reprocess Process Indicator N Normal Processing

Save Return to Search Notify



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
60.	If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a "0". In this case, proceed to Step 62. If the Pending Activities field displays a "1", click the Schedule/Prepare Activity button. Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. 
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 
61.	Click the OK button to close the message. 
	The On-Demand Event Process page redisplay. 



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
62.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. Note: If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line. StatusPreparedClassBIREvent Status Update Event StatusOpen for Processing
63.	Click the Election Entry button. Election Entry

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

BenAdmin Data Entry

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Sched ID EM00Empl ID

Ben Record 0Event ID 6

Event Data 04/21/2026 Birth or AdoptionExcess Credit Rollover To Forfeit Excess Credits

Available Plans and Options

Plan Type 10 : Medical

Option Code 34

COVA Care + Expanded Dental (ACC2) (Self + Spouse)

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
01	Jane Doe	Spouse			Spouse	

OK

Cancel

Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
64.	Select the applicable Medical Plan based on the employee's Benefits Enrollment form. Click the Option Code Look up icon (magnifying glass) within the Plan Type 10: Medical section and select the applicable coverage code. The Coverage Codes are as follows: • 1 – Single • 2 – Employee + Spouse • 3 – Employee + Child (except for Tricare) • 4 – Employee + 2 or More Dependents (Family – except for Tricare) • 8 – Employee + Child(ren) (Tricare only) • 9 – Family (EE + SP + Child/ren for Tricare only) Plan Type 10 : Medical Option Code 36  COVA Care + Expanded Dental (ACC2) (Family)
	For this Benefit Event, select the applicable coverage code based on the newborn dependent being added. If the coverage code does not need to be changed based on the addition of the newborn dependent, proceed to the next step. Note: This Birth Event only allows the employee to change the coverage code. The actual Health Plan election cannot be changed (Option Code "36" has been selected for this scenario).
65.	Click the Dependents / Beneficiaries tab to add the newborn dependent. Event / Participant Selection Option Election Dependents / Beneficiaries



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **Dependent / Beneficiaries** page displays.

BenAdmin Data Entry

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

Schedule ID EM00 Employee ID [Redacted]
Event ID 6 Event Data 04/21/2026 Birth or Adoption
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
Jane Doe	Spouse	Approved Dependent	04/15/1990

[Change/Add Dependent Data](#)

Elections Requiring Supplemental Information

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

OK Cancel Apply Refresh

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

66. Click the **Change/Add Dependent Data** link.

[Change/Add Dependent Data](#)

The **Dependent/Beneficiary** page displays in a pop-up window with the **Name** tab displayed by default.

Dependent/Beneficiary

Name Address Personal Profile

[Redacted] Person ID [Redacted]

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

*Dependent/Beneficiary ID 01

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

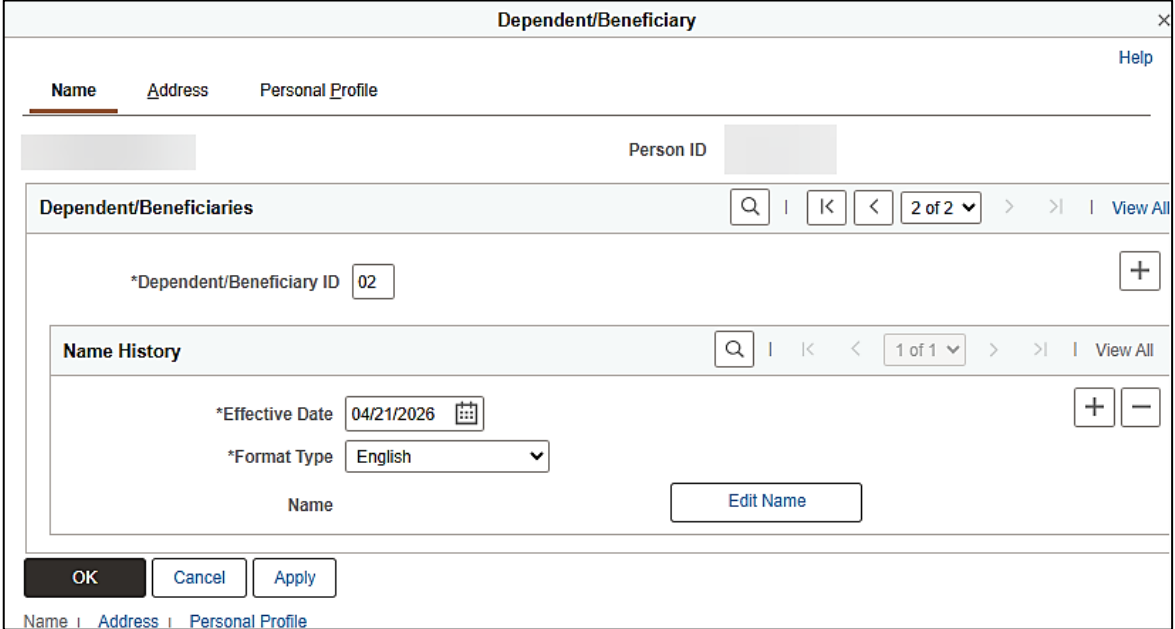
*Effective Date 04/01/2026
*Format Type English

Name Jane Doe [Edit Name](#)

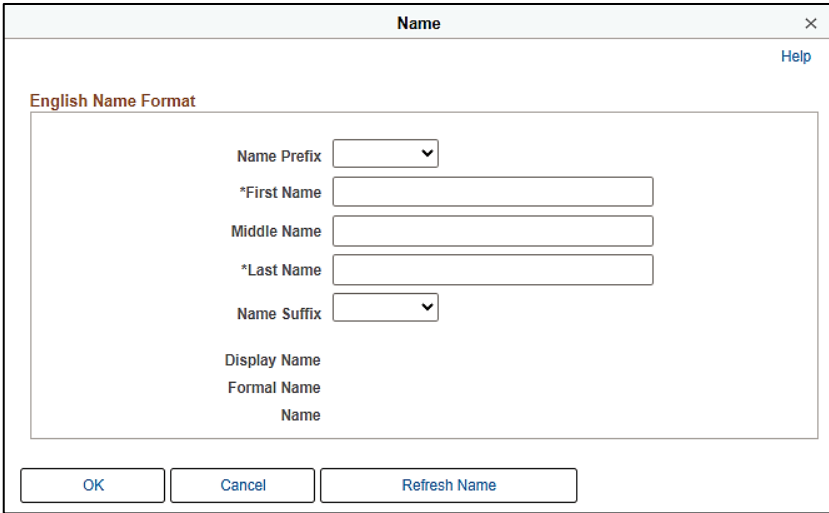
OK Cancel Apply

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

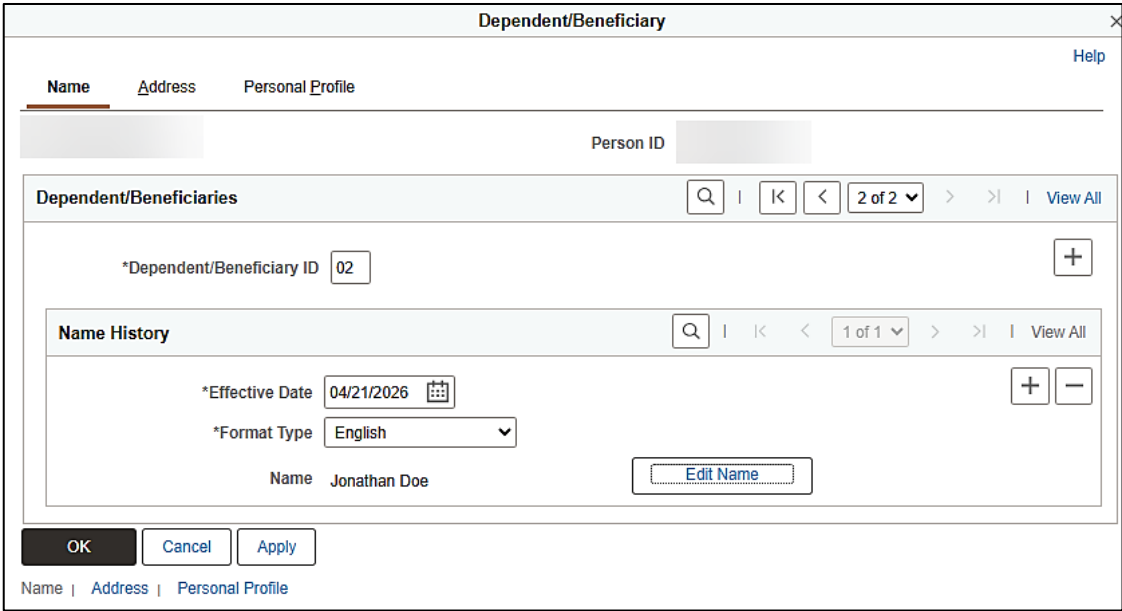
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
67.	Click the Add a new row icon (+) within the Dependent/Beneficiaries section to add the new Dependent/Beneficiary ID. 
The Dependent/Beneficiary Name page refreshes and the new row displays (Dependent/Beneficiary ID "02" for this scenario). 	
	For Life Events, the Effective Date field defaults to the date that the coverage will begin. For this scenario, a newborn dependent is being added based on a Birth event. Therefore, the Effective Date field defaults to the newborn's date of birth ("4/21/2026" for this scenario). Do not change this date as it must match the Event Date, or the system will not recognize this dependent as eligible for coverage. The Dependent/Beneficiary ID field will default to the next available Dependent/Beneficiary ID number ("02" in this scenario) and increment by 1 for each additional dependent subsequently added.
68.	Click the Edit Name button. 

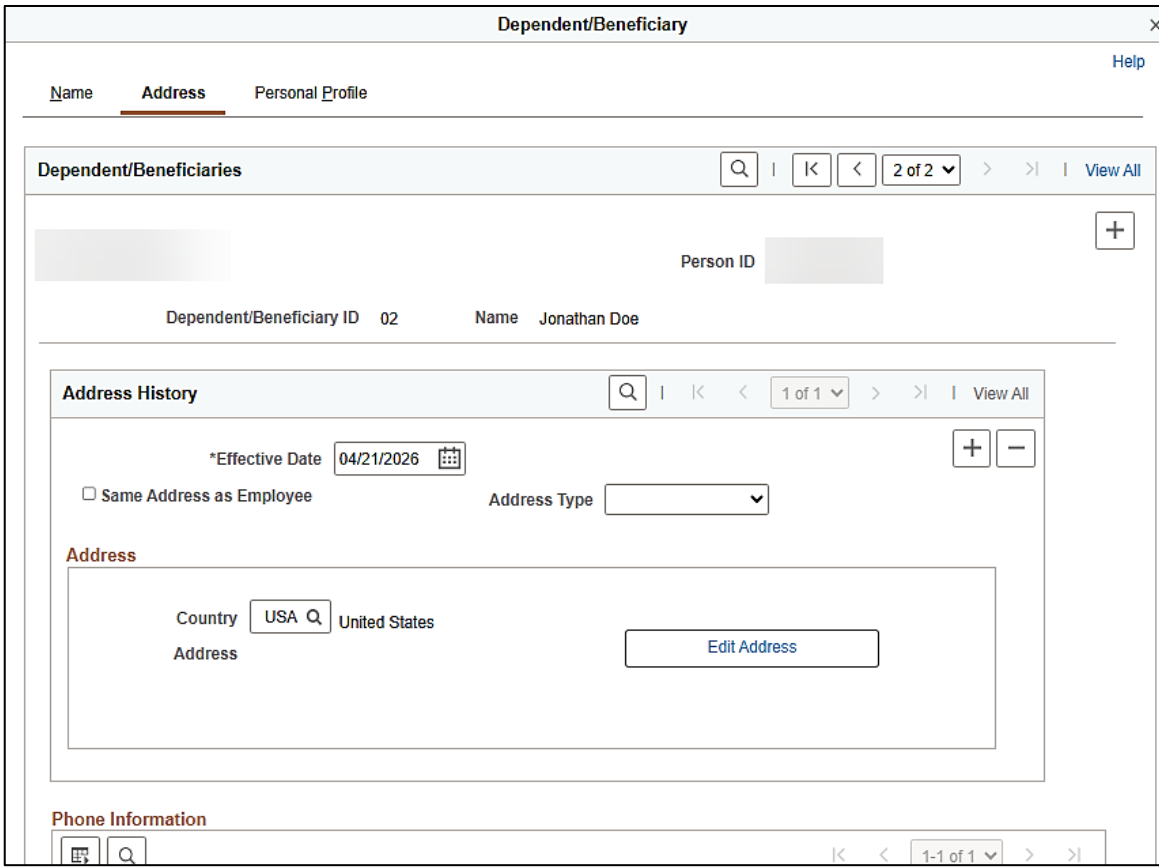
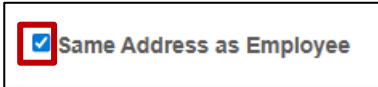
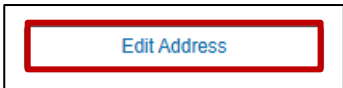
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Name page displays in a pop-up window. 
69.	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. Note: Do not use accent marks or special characters in the name fields. These are not recognized and can cause errors when uploading to the Vendor. 
70.	Click the OK button. 

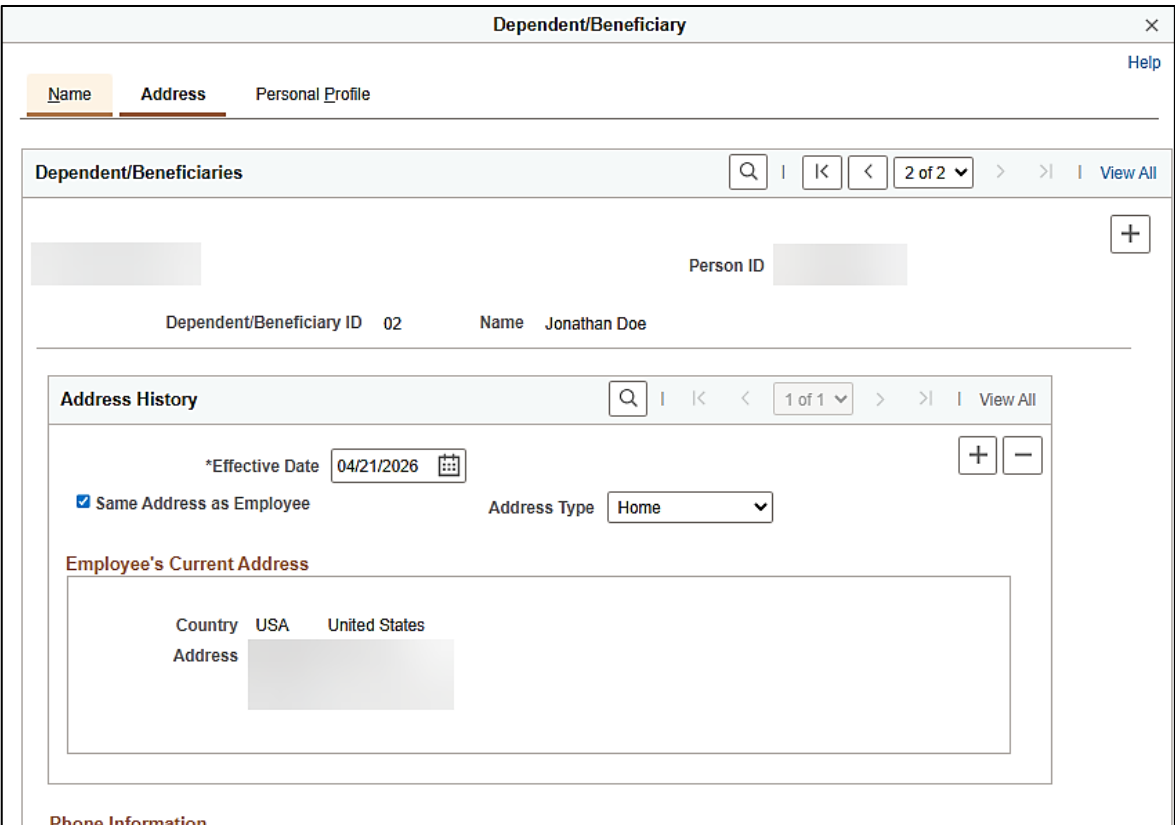
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Dependent/Beneficiary Name page redisplay. 
	The Display Name field auto-populates with the name information previously entered.
71.	Click the Address tab. 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Address page displays. 
72.	Select the Same Address as Employee checkbox option if applicable. For this scenario the checkbox is selected. 
	The address information can be completed as applicable for the dependent by either selecting the applicable Address Type using the dropdown button provided 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). 

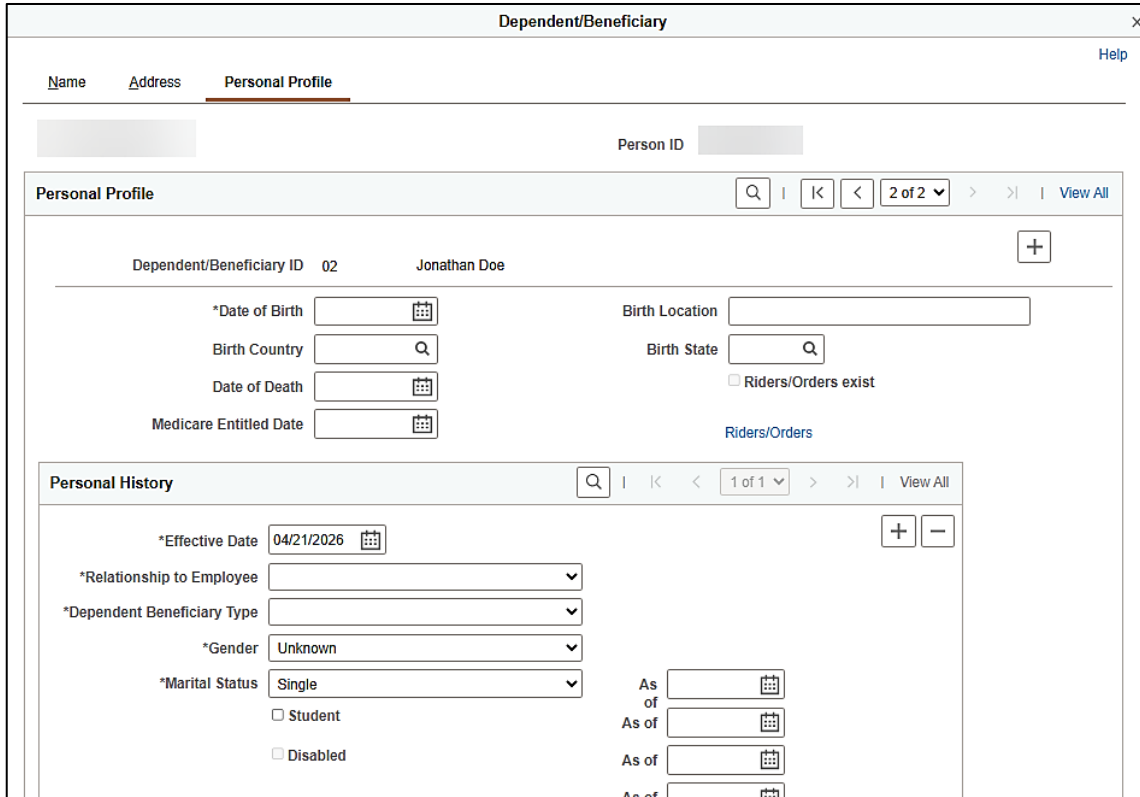
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Address page refreshes. 
	The address information auto-populates in the Employee's Current Address section.
73.	Click the Personal Profile tab. 

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **Personal Profile** page displays.



The screenshot shows the 'Personal Profile' page for a dependent/beneficiary named Jonathan Doe. The page is divided into two main sections: 'Personal Profile' and 'Personal History'.

Personal Profile Section:

- Dependent/Beneficiary ID: 02
- Name: Jonathan Doe
- *Date of Birth: [Calendar icon]
- Birth Country: [Search icon]
- Date of Death: [Calendar icon]
- Medicare Entitled Date: [Calendar icon]
- Birth Location: [Text field]
- Birth State: [Search icon]
- ☐ Riders/Orders exist
- [Riders/Orders](#)

Personal History Section:

- *Effective Date: 04/21/2026 [Calendar icon]
- *Relationship to Employee: [Dropdown menu]
- *Dependent Beneficiary Type: [Dropdown menu]
- *Gender: Unknown [Dropdown menu]
- *Marital Status: Single [Dropdown menu]
- ☐ Student
- ☐ Disabled
- As of: [Calendar icon]
- As of: [Calendar icon]
- As of: [Calendar icon]
- As of: [Calendar icon]



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).

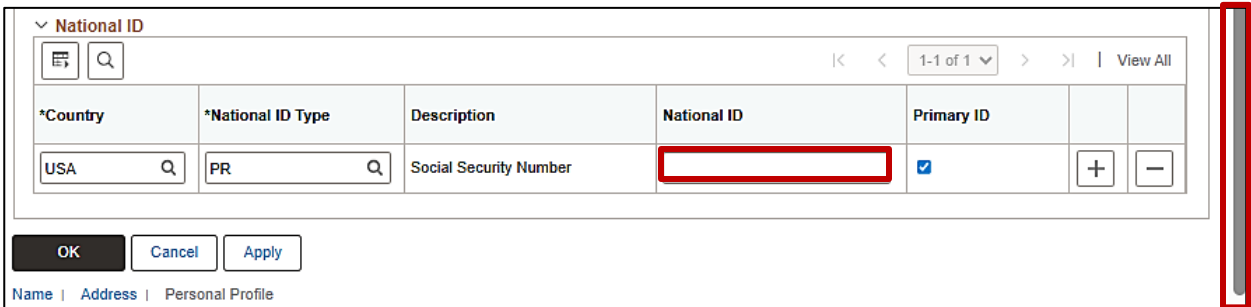
74. Click the **Date of Birth Calendar** icon and select the dependent's date of birth ("04/21/2026" for this example).

*Date of Birth [Calendar icon]

75. Click the **Relationship to Employee** dropdown button and select the dependent's relationship to the employee ("Child" for this example).

*Relationship to Employee [Dropdown menu]

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
76.	Click the Dependent Beneficiary Type dropdown button and select “Approved Dependent”. 
	“Approved Dependent” is selected once the applicable supporting documentation has been provided by the employee. The coverage for the dependent is not reported to the Vendor until the dependent is in this approved status.
77.	Click the Gender dropdown button and select the dependent’s gender (“Unknown”, “Male”, or “Female”) (“Male” in this example). Note: For benefits purposes, “Male” or “Female” must be selected. If unsure at the time of entry, select “Unknown” and update once Gender is confirmed. 
78.	The Marital Status field defaults to “Single”. Do not update for this newborn dependent. 
79.	Click the vertical scrollbar to scroll down on the page to the National ID section and enter the dependent’s Social Security Number (SSN) in the National ID field. 
	If the employee did not provide the dependent’s SSN, or in the case of a newborn, the SSN has not been obtained yet, this field can be left blank for now. However, as soon as the SSN is obtained, it should be entered as soon as possible by re-opening and reprocessing the Benefit Event. Dependent SSNs are necessary for accurate ACA reporting. Agency BAs can use the Base Benefits Consistency Audit report to monitor dependents with a missing SSN.
80.	Click the OK button. 



BN361 Creating and Completing a Life Event on Behalf of an Employee

Step

Action

The **Dependents / Beneficiaries** page redisplay.

BenAdmin Data Entry

×

Event / Participant Selection

Option Election

Dependents / Beneficiaries

Schedule ID

EM00

Employee ID

Event ID

6

Event Data

04/21/2026

Birth or Adoption

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
Jane Doe	Spouse	Approved Dependent	04/15/1990
Jonathan Doe	Child	Approved Dependent	04/21/2026

Change/Add Dependent Data

Elections Requiring Supplemental Information

10	Medical	Enroll Dependents
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OK

Cancel

Apply

Refresh

Event / Participant Selection

Option Election

Dependents / Beneficiaries

81. Click the **Option Election** tab.

Event / Participant Selection

Option Election

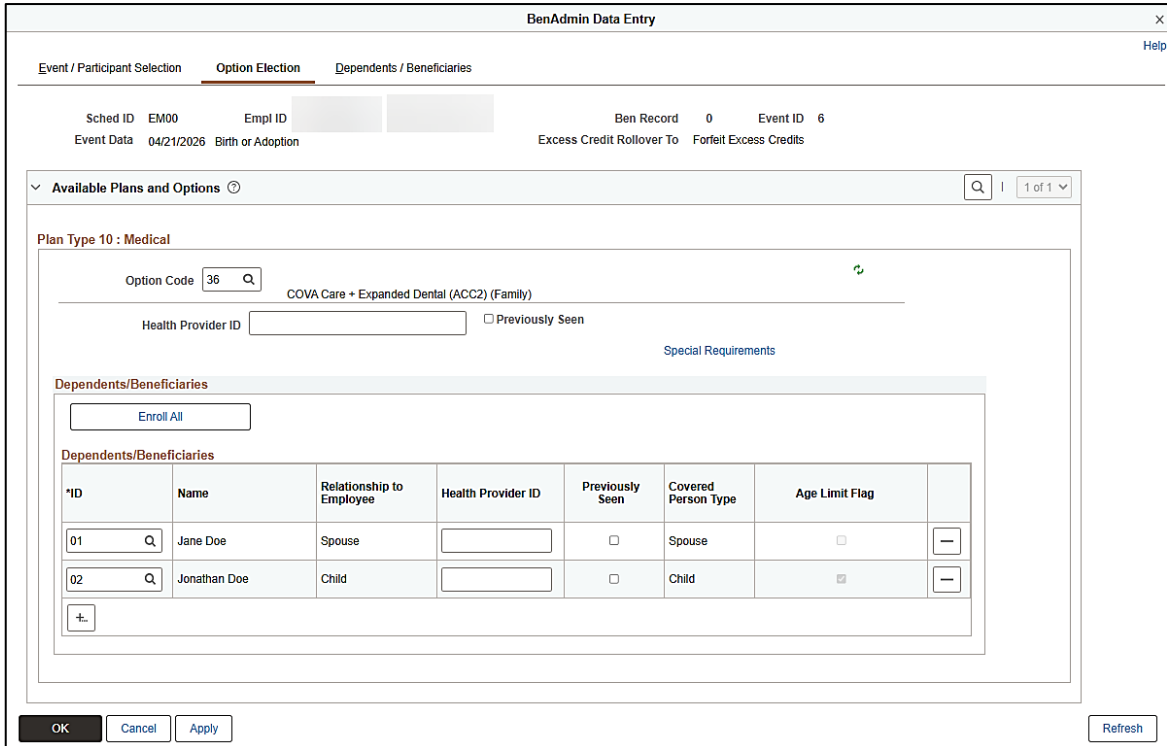
Dependents / Beneficiaries



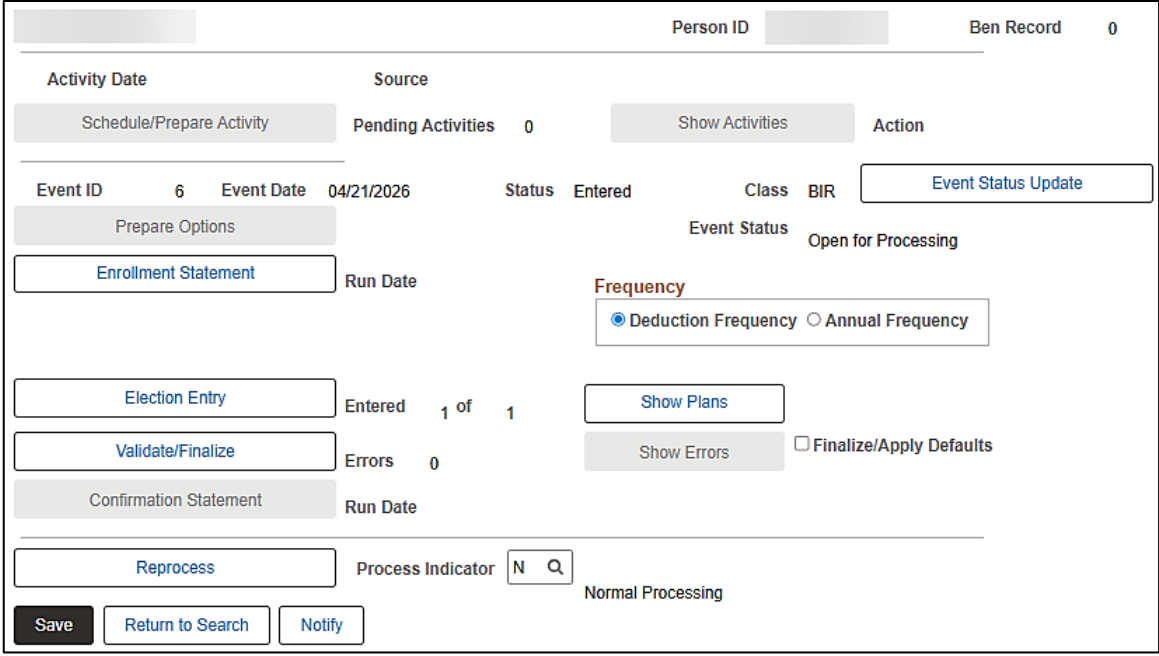
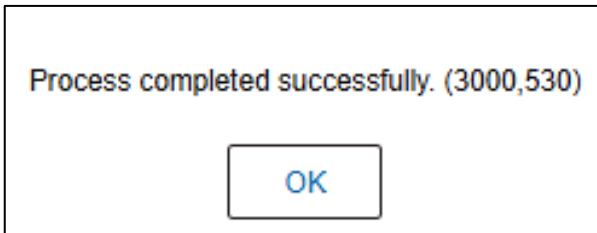
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Option Election page redisplay.
82.	Click the Enroll All button if all dependents will be enrolled (applicable for this scenario) to enroll the dependent(s) in the previously selected Medical Plan.
	Users can also enroll the dependent(s) in the previously selected Medical Plan by 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 (+...).
A message displays in a pop-up window indicating that all dependents will be removed in order to re-enroll the eligible dependents. This is an expected message and not an error.	

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
83.	Click the OK button to close the message. 
The Option Election page redisplay. 	
	The dependents enrolled display in the Dependents/Beneficiaries section. Validate for accuracy and ensure that all applicable dependents are listed.
84.	Click the OK button. 

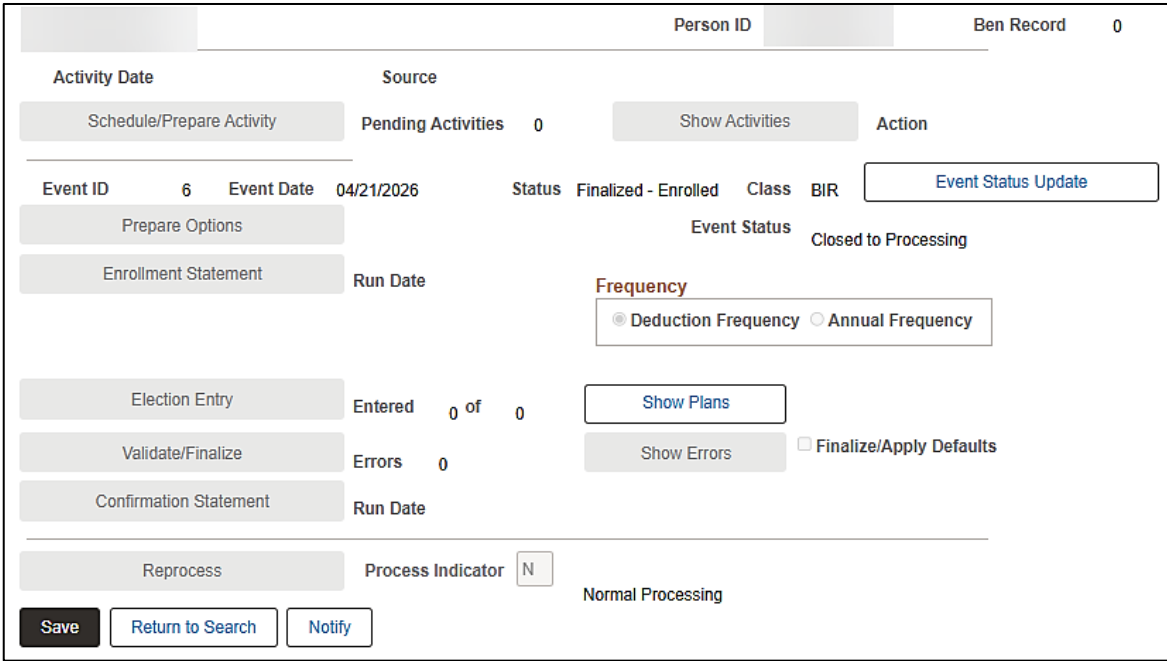
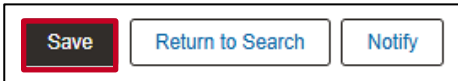
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The On-Demand Event Process page redisplay. 
	The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.
85.	Click the Validate/Finalize button. This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables. 
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 
86.	Click the OK button to close the message. 



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

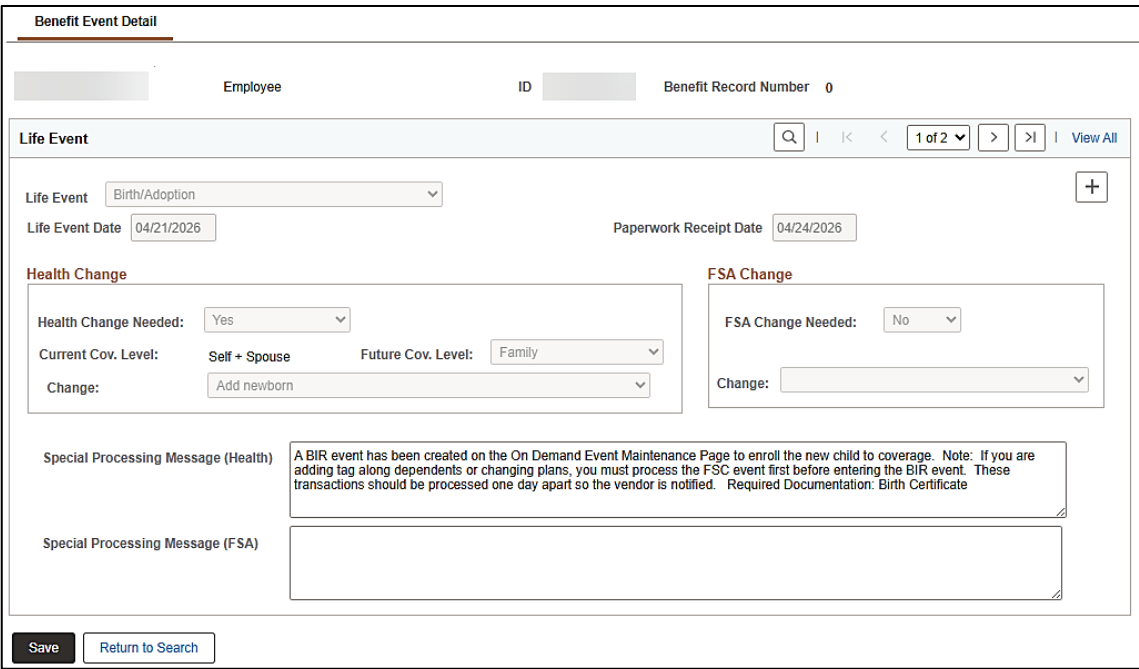
Step	Action
	The On-Demand Event Process page redisplay. 
	The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.
87.	Click the Save button. 
	This Benefit Event to add the newborn dependent is now complete. Refer to the BN361 Reviewing Employee Benefits Information Job Aid (specifically, the Reviewing the Benefits Summary Page section), located on the Cardinal website in Job Aids under Learning for instructions on how to validate accuracy. For more information pertaining to viewing and printing a Confirmation Statement, refer to the Job Aid titled BN361 How to Review Benefits Statements, located on the Cardinal website in Job Aids under Learning. This information will be transmitted to the Health Vendor in the evening interface file. If no other elections are being made by the employee, this process is complete. However, if any Flex Spending elections are being made (as in this scenario), continue with the next step. Next, the Benefit Event must be created in order to enroll the employee in the Flex Spending Dependent Care plan.



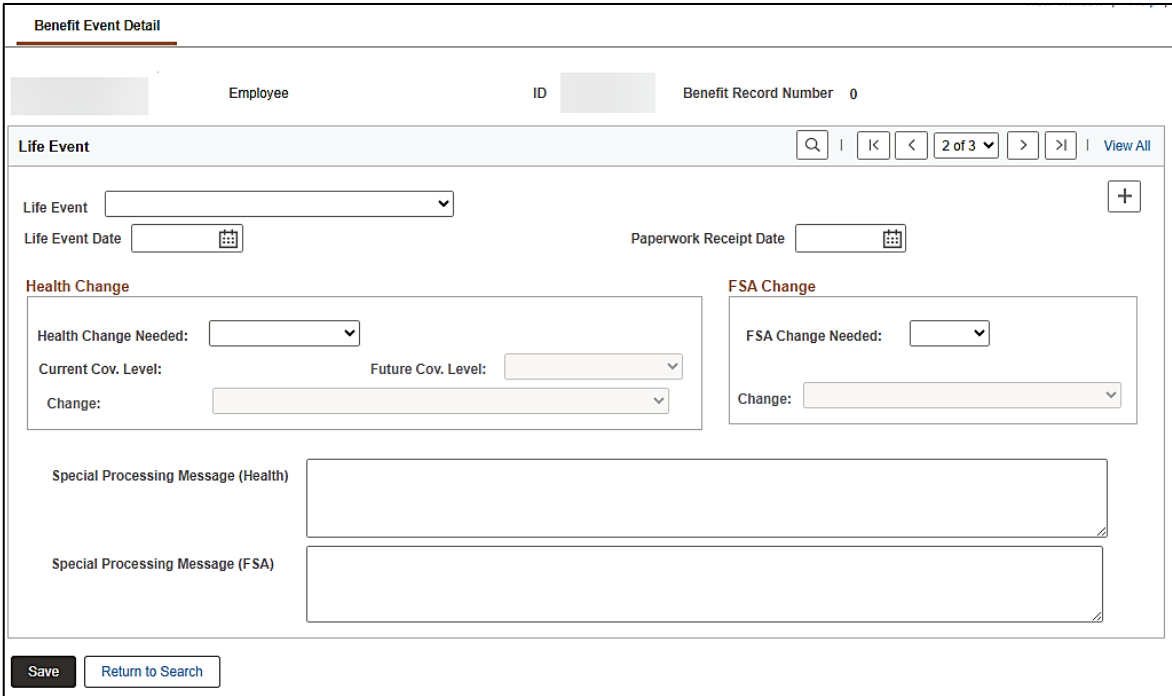
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
88.	Navigate to the Benefit Event page using the following path in the Benefits WorkCenter: Links > Enrollment Administration > Benefit Event
The Benefit Event Entry Find an Existing Value Search page displays.	
Benefit Event Entry Find an Existing Value Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches Empl ID begins with Benefit Record Number = Empl Record = First Name begins with Last Name begins with Business Unit begins with Department begins with Show fewer options Case Sensitive Include History Search Clear	
89.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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.
Empl ID begins with	
90.	Click the Search button.
Search Clear	

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The Benefit Event Detail page displays. 
	The Benefit Event Entry page displays with the information from any previously created Benefit Events for the employee.
91.	Click the Add a new row icon (+). 

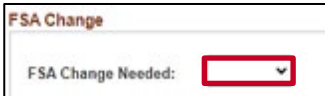
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	The page refreshes and the new row displays. 
92.	Click the Life Event dropdown button and select the applicable type of Life Event (Dependent Care Cost/Coverage Change for this scenario). 
93.	Click the Life Event Date Calendar icon and select the applicable date ("4/21/2026" in this scenario). 
94.	Click the Paperwork Receipt Date Calendar icon and select the applicable date ("4/24/2026" in this scenario). 
	This is the date that the Benefits Enrollment form was received from the employee.



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
95.	Click the FSA Change Needed dropdown button and select "Yes". 
96.	Click the Change dropdown button and select "Update dependent care enrollment". 
97.	Click the Save button. 

The **Benefit Event Detail** page refreshes.

Benefit Event Detail

Employee

ID

Benefit Record Number 0

Life Event

Q | K < 2 of 3 > > | View All

Life Event

Dependent Care Cost/Coverage Change

+

Life Event Date

04/21/2026

Paperwork Receipt Date

04/24/2026

Health Change

FSA Change

Health Change Needed:

Current Cov. Level:

Future Cov. Level:

Change:

FSA Change Needed:

Change:

Special Processing Message (Health)

Special Processing Message (FSA)

An FSD event has been created for you to update the Dependent Care enrollment. Reminder: You are not allowed to make changes to Medical FSA for this life event.

Save

Return to Search

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	After saving, review the messages in the Special Processing Message (Health) and Special Process Message (FSA) field. These messages will provide next step instructions. If an additional Office of Health Benefits (OHB) approval will be required based on the dates entered or if any other processing guidance is applicable, a comment will display in the Special Processing Message (Health) field and/or the Special Processing Message (FSA) field. In this scenario, an FSC Benefit Event has been created for the purpose of enrolling the employee in the Flex Spending Dependent Care plan. This Benefit Event has a coverage begin date of the first day of the following month ("5/1/2026" for this scenario). This Benefit Event (Life Event) is now created. Next, this Benefit Event must be processed.
98.	Navigate to the On-Demand Event Process page using the following path in the Benefits WorkCenter: Links > Enrollment Administration > On-Demand Event Process
The On-Demand Event Maintenance Find an Existing Value Search page displays. On-Demand Event Maintenance Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values.  Recent Searches Choose from recent searches ▼  Saved Searches Choose from saved searches ▼ Empl ID begins with ▼ Empl Record = ▼ Name begins with ▼ Last Name begins with ▼ Second Last Name begins with ▼ Alternate Character Name begins with ▼ ^ Show fewer options ☐ Case Sensitive Search Clear	
99.	Enter the employee's Employee ID in the Empl ID field. Note: Users can also search for the applicable employee using the various available 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. Empl ID begins with ▼
100.	Click the Search button. Search Clear



Benefits Job Aid

BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
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The **On-Demand Event Process** page displays.

Person ID [] Ben Record 0

Activity Date 05/01/2026 Source Manual Event

[Schedule/Prepare Activity](#) Pending Activities 1 [Show Activities](#) Action FSD

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 N Normal Processing

[Save](#) [Return to Search](#) [Notify](#)



Review the **Activity Date** field. For Life Events, this date will populate based on the coverage begin date for the applicable type of Life Event (in this scenario, the Benefit Event is being processed to enroll the employee in the Flex Spending Dependent Care plan based on a Birth Life Event. Therefore, the **Activity Date** field defaults to the first day of the following month ("5/1/2026" in this scenario). Ensure that this date is accurate.

The **Source** field will be "Manual Event". The **Action** field will default based on the type of Life Event ("FSD" in this scenario).

101. Click the **Show Activities** button.

[Show Activities](#)

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

Person ID [] Ben Record 0

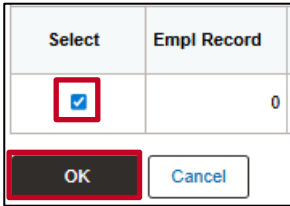
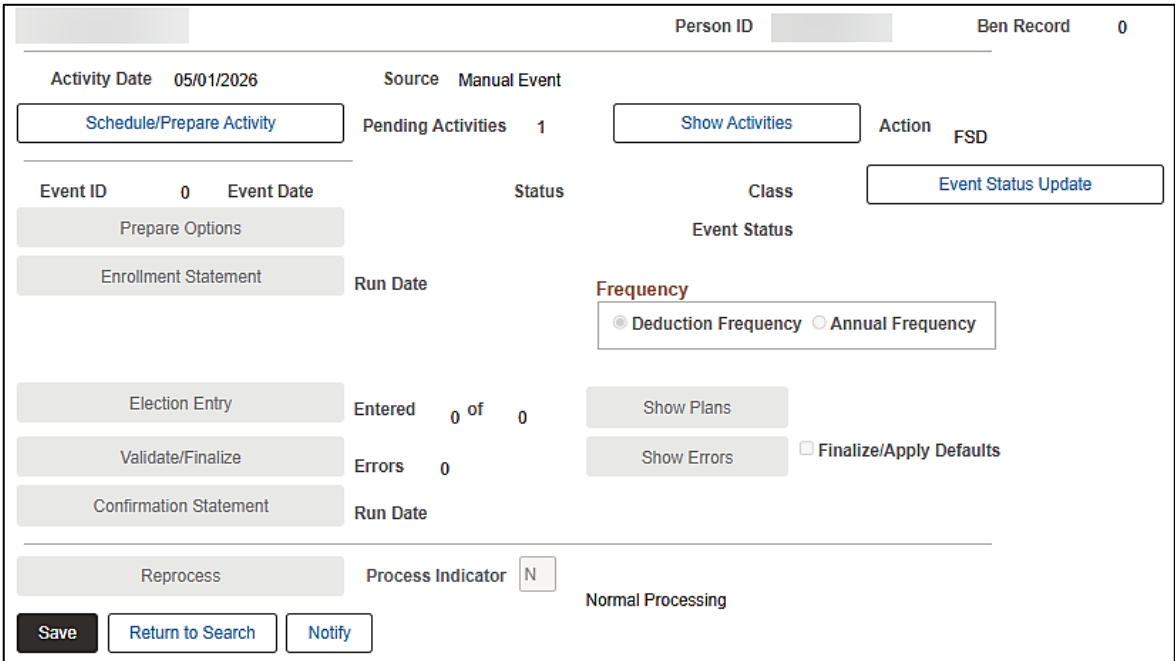
BAS Activity

[\[\]](#) [\[\]](#) [1-1 of 1](#) [\[\]](#) [\[\]](#)

Select	Empl Record	Action Source	Event Date	Event Effseq	BAS Action	COBRA Action		
☒	0	Manual Event	05/01/2026	0	FSD		+	-

[OK](#) [Cancel](#)

BN361 Creating and Completing a Life Event on Behalf of an Employee

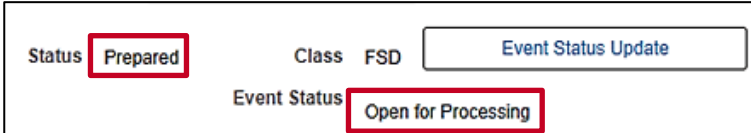
Step	Action
102.	Ensure that the Select checkbox option for the Benefit Event is selected and then click the OK button. 
The On-Demand Event Process page redisplay. 	
103.	If the Benefits Administration process has already run, the Schedule/Prepare Activity button will be disabled, and the Pending Activities field will display a "0". In this case, proceed to Step 105. If the Pending Activities field displays a "1", click the Schedule/Prepare Activity button. Note: Clicking the Schedule/Prepare Activity button will launch an automated program that schedules and prepares the activity. 



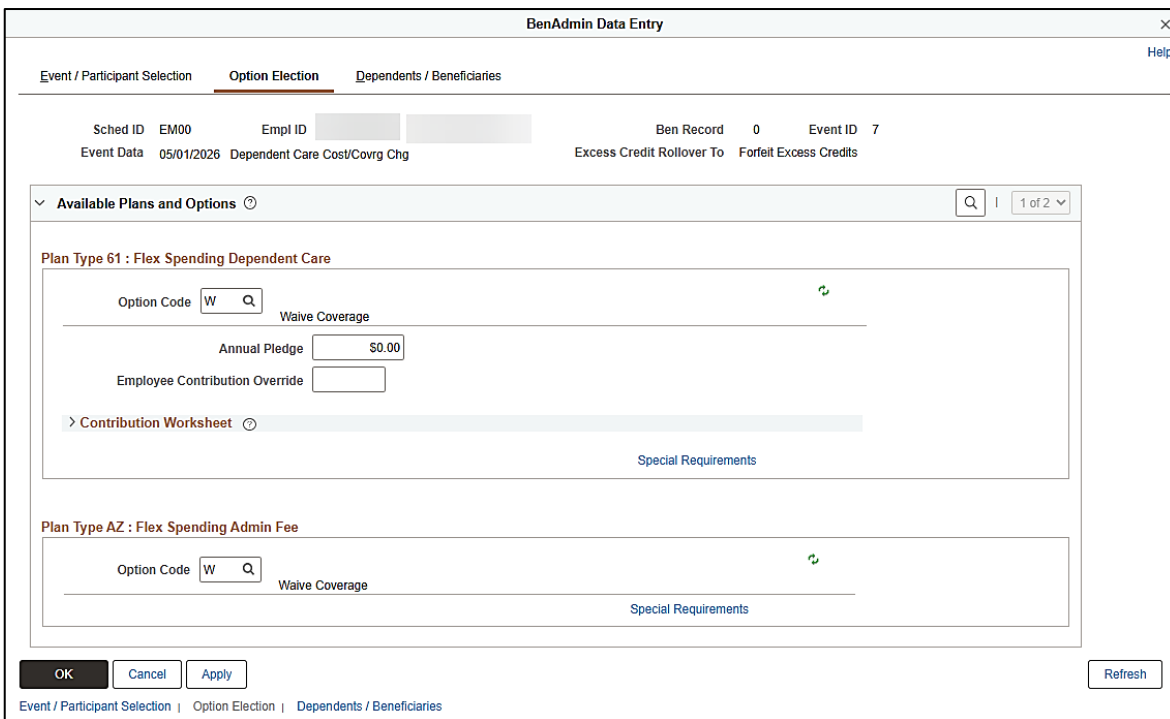
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. Process completed successfully. (3000,530) OK
104.	Click the OK button to close the message. OK
	The On-Demand Event Process page redisplay. Person ID Ben Record 0 Activity Date Source Schedule/Prepare Activity Pending Activities 0 Show Activities Action Event ID 7 Event Date 05/01/2026 Status Prepared Class FSD Event Status Update Prepare Options Event Status Open for Processing Enrollment Statement Run Date Frequency Deduction Frequency Annual Frequency Election Entry Entered 0 of 2 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

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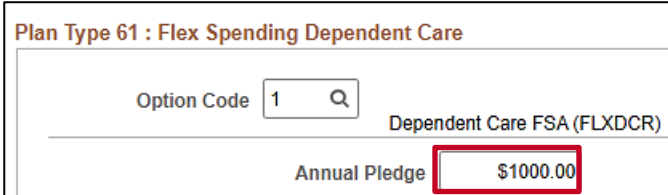
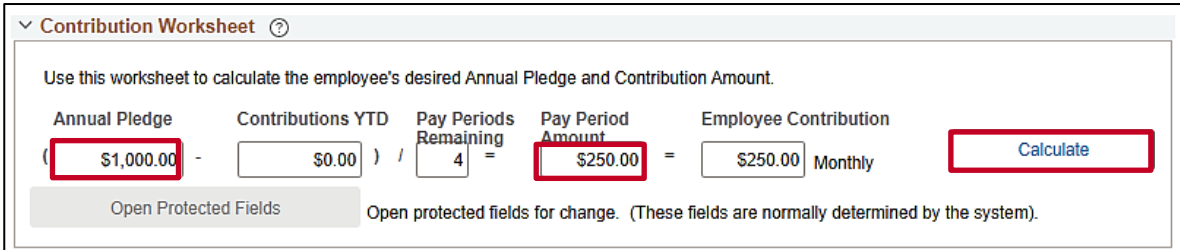
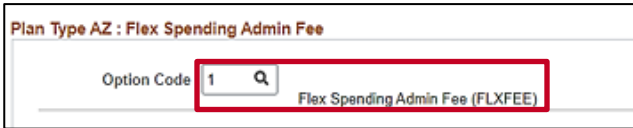
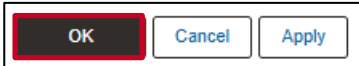
Step	Action
105.	Confirm that the Status field displays as “Prepared” and the Event Status field displays as “Open for Processing”. Note: If these statuses do not display as indicated, please submit a VCCC Ticket with “Cardinal Benefits” in the Subject line. 
106.	Click the Election Entry button. 

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

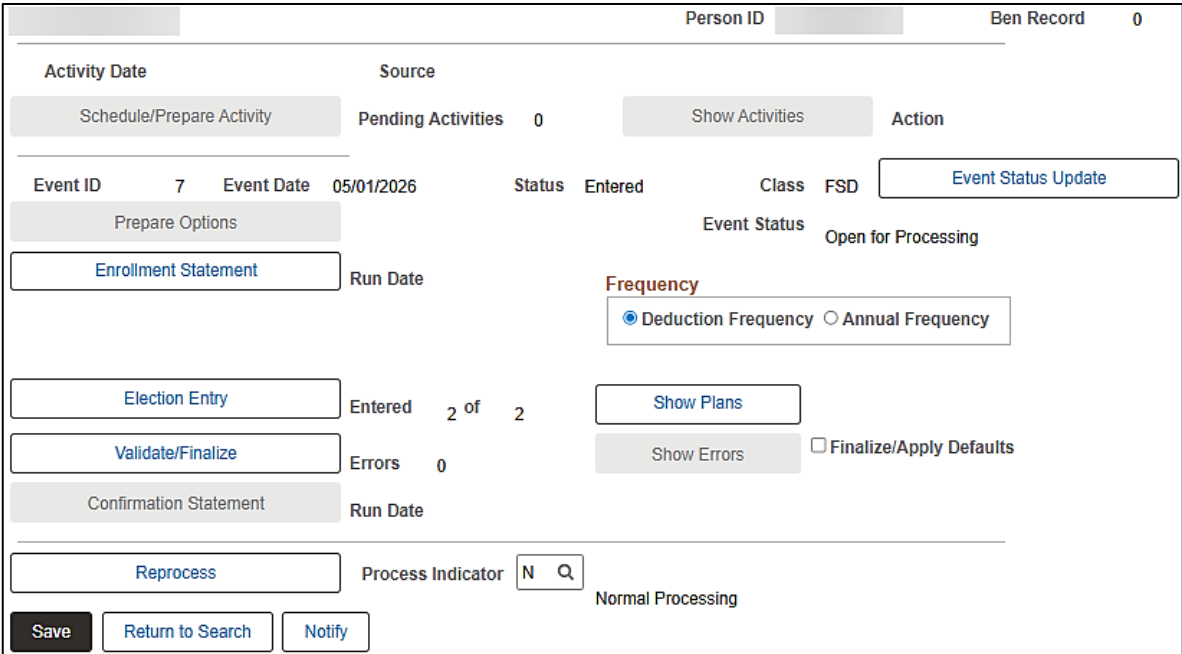
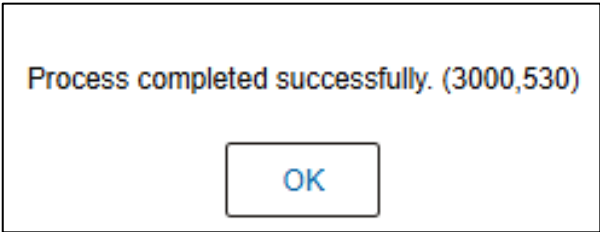



Based on the manual event created, only the **Plan Type 61: Flex Spending Dependent Care** and **Plan Type AZ: Flex Spending Admin Fee** sections display.

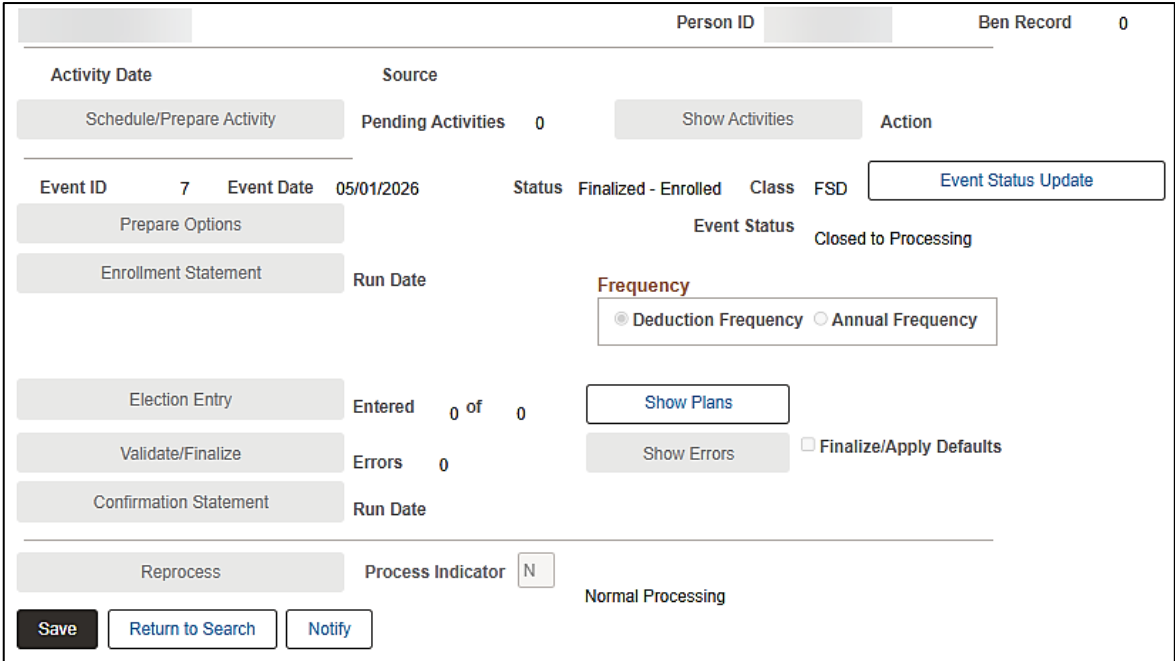
BN361 Creating and Completing a Life Event on Behalf of an Employee

Step	Action
107.	Click the Option Code Look up icon (magnifying glass) within the Plan Type 61: Flex Spending Dependent Care section and select the applicable coverage code (Option Code "1"). 
108.	Enter the applicable amount in the Annual Pledge field based on the employee's Benefit Enrollment form ("1,000.00" for this scenario). 
	The fields within the Contribution Worksheet section can also be used to calculate the Annual Pledge amount if the employee provided a per Pay Period. 
109.	Complete the Plan Type AZ: Flex Spending Admin Fee section as needed. 
	If the employee is enrolled in one or more Flex Spending Accounts (Flex Spending Medical or Flex Spending Dependent Care plan), the employee must be enrolled in the Flex Spending Admin Fee (Option Code "1").
110.	Click the OK button once complete. 

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Step	Action
	The On-Demand Event Process page redisplay. 
	The Status field will now display as “Entered”. The Event Status field will still display as “Open for Processing”.
111.	Click the Validate/Finalize button. Note: This process will validate that all of the elections are valid, close the Benefit Event, and update the Base Benefits Tables. 
	A Confirmation message displays in a pop-up window once the manual Benefits Administration process completes. 

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Step	Action
112.	Click the OK button to close the message. 
The On-Demand Event Process page redisplay. 	
	The Status field will now display as “Finalized-Enrolled”. The Event Status field will still display as “Closed to Processing”.
113.	Click the Save button. 
	This Benefit Event to add the Flex Spending Dependent Care plan is now complete. Refer to the BN361 Reviewing Employee Benefits Information Job Aid (specifically, the Reviewing the Benefits Summary Page section), located on the Cardinal website in Job Aids under Learning for instructions on how to validate accuracy. For more information pertaining to viewing and printing a Confirmation Statement, refer to the Job Aid titled BN361 How to Review Benefits Statements, located on the Cardinal website in Job Aids under Learning.